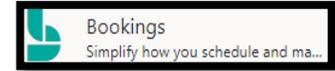


This document explains how to set up the *MS Bookings* application to allow users to schedule meetings. You can define various types of meetings, for example: in-person and online. The scheduled meetings will automatically appear in your *Outlook* calendar. If the user selects a virtual meeting, *MS Bookings* will automatically schedule an *MS Teams* meeting. This document explains how to set up *MS Bookings* for your account and how to use it from the faculty and end-user perspective.



Bookings Setup

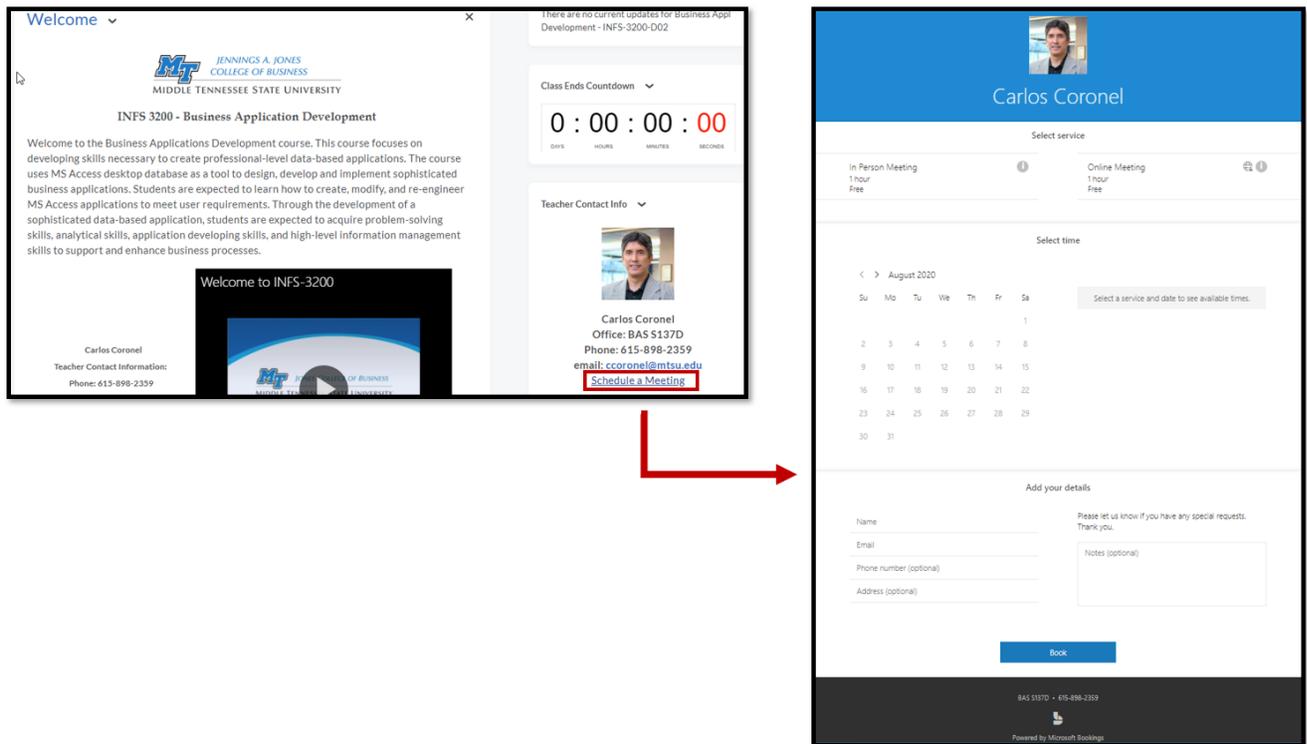
- 1) Login to MS Office 365. Go to <https://portal.office365.com>, use your MTSU FSA credentials.
- 2) Click on **All Apps** then, click on **Bookings**
- 3) A page will appear, click on **[Get it Now]**. In the **[Add Booking Calendar]** window, click on the **[+]** symbol then, enter your name and click on **[Continue]**
- 4) In your **Bookings** homepage, you must configure several items.
- 5) **Business Information:** enter your name, address, phone, email, and use your picture as a business logo. Optionally, you can configure your (default) business hours.
- 6) **Staff:** Your name will appear in the staff members page. Edit your details (phone, office, etc.). Click on **"Email notifications"** to get emails when someone schedules a meeting. Click on **"Events on Office calendar affect availability."** This way, Bookings will only show time slots that you do not have any events in your Outlook calendar. Under **Availability**, use the **+** sign to add multiple blocks of hours per day. For example, you are only available Monday & Wednesday from 1 pm to 4 pm, and Friday from 9 am to 11:30 am.
- 7) **Services:** There is a default meeting created. You can add a new service type. For example, you could define an in-person and an online meeting; or an advising and an orientation meeting. For each service type, you enter a name, a description (optional), and a location. Click on the **"Add online meeting"** button for online meetings (adds **Join Teams meeting** link). Enter the **"Default Duration"** for the meeting type.
Default Price, set to Free.
 Check **Show this service on the Booking page** to show this option on the main booking page.
 Check **"Use the default scheduling policy."** The default scheduling policy is defined in the **Booking Page** settings. Or, create a scheduling policy for each service here.
Assign Staff: Assign a staff member to this service type. *** Important ***
- 8) **Booking Page:** This configures the look of your default booking page. Select a **color scheme** and check **"Display business logo..."** to show your picture.
Scheduling policy: defines the time increments, maximum, and minimum lead time for the bookings.
Email notification: I suggest to click on both options.
Staff: if you have multiple staff, check **"Allow customers to choose a specific person for the booking."**
General availability: select **"Bookable when staff are free."**
Publish the page. On the top menu bar, click on **Save and publish**.
 At this time, you can click on **[Open published page]** to see how your page looks.
 Notice the URL of your page at the top of your page. You will use this URL later.

You can now use this URL in your Outlook email signature, D2L course page, web page, etc.

Using Booking to Schedule Meetings

This section describes the steps the end-users see when they click on the Booking link.

1. You can add the link to your bookings page to your email signature, your web page and also to your D2L content and even, create a widget for teacher contact information.
2. When the user clicks on the link, your personalized Bookings page opens in the web browser



3. In this page, the end-user will:
 - a. Select the type of meeting (if you have defined various Services). In the sample page above, we have two type of meetings: In-Person Meeting and Online Meeting. The user must select the type of meeting first.
If you used the individual service URL to create the link, this step is not required.
 - b. Next, select the date and time for the meeting. *Bookings* will show the available times you selected for the assigned staff. *Bookings* will only show the time slots available according to the staff calendar and hours of availability.
 - c. Next, you must enter the name and email. (see picture below)

Carlos Coronel

In Person Meeting

In Person Meeting
1 hour
Free

Online Meeting
1 hour
Free

July 30, 3:00 pm

< > July 2020

Su	Mo	Tu	We	Th	Fr	Sa	9:00 am	9:30 am	10:00 am
			1	2	3	4	10:30 am	1:30 pm	2:00 pm
5	6	7	8	9	10	11	2:30 pm	3:00 pm	3:30 pm
12	13	14	15	16	17	18	4:00 pm		
19	20	21	22	23	24	25			
26	27	28	29	30	31				

All times are in (UTC-06:00) Central Time (US & Canada)

Add your details

Tetiana Bak

tb5u@mtmail.mtsu.edu

Phone number (optional)

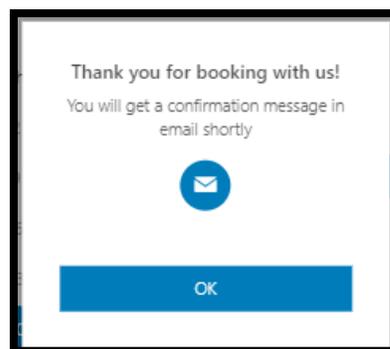
Address (optional)

Please let us know if you have any special requests. Thank you.

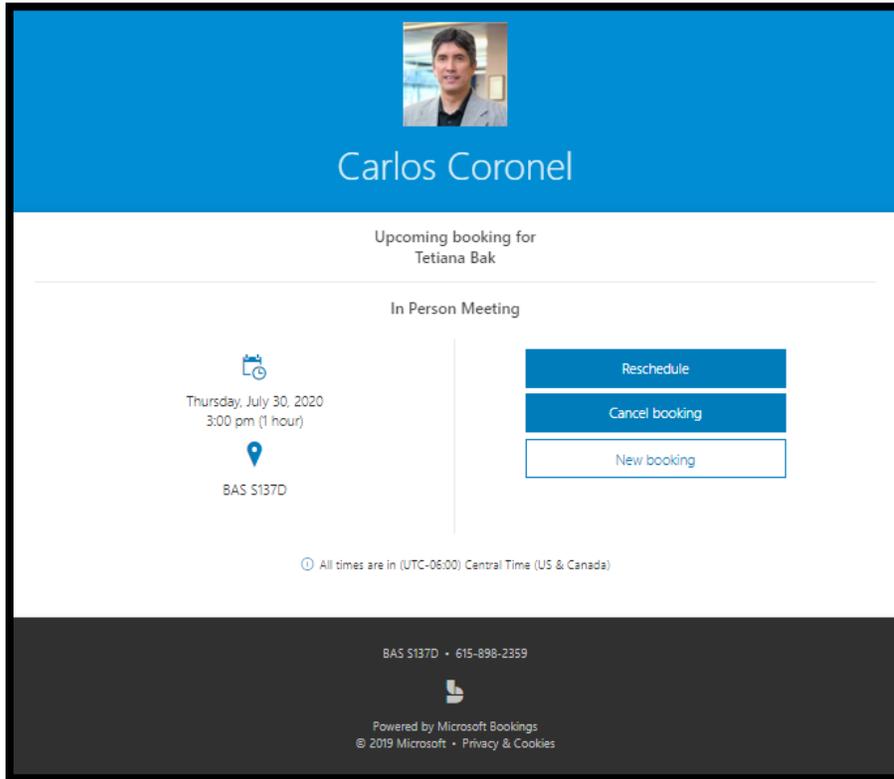
Test meeting

Book

- d. Click on the **Book** button.
- 4. After a few seconds, the message below will appear on the screen.



- Click **OK**. *Bookings* will show the screen below. As shown in the picture below, there are options to **Reschedule** or **Cancel** the meeting. Close the browser.

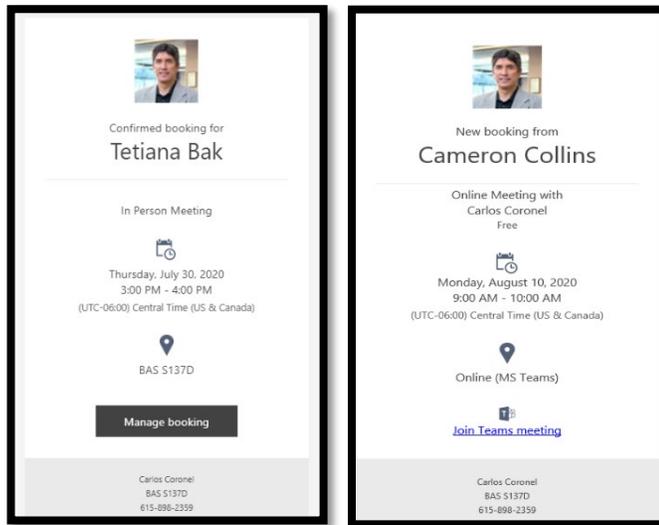


- The meeting will automatically appear in the teacher and student's Calendar in Outlook.
- Remember, the end-user or the teacher can cancel or reschedule the meeting at any time. If this is the case, the participants will receive emails notifying about the changes.
- If an end-user cancels a meeting, then the teacher's calendar will still show the meeting as canceled meeting. The teacher has to delete the meeting event manually. However, the time slot is available to schedule meetings.
- The next section explains the email chain that is generated by a booking.

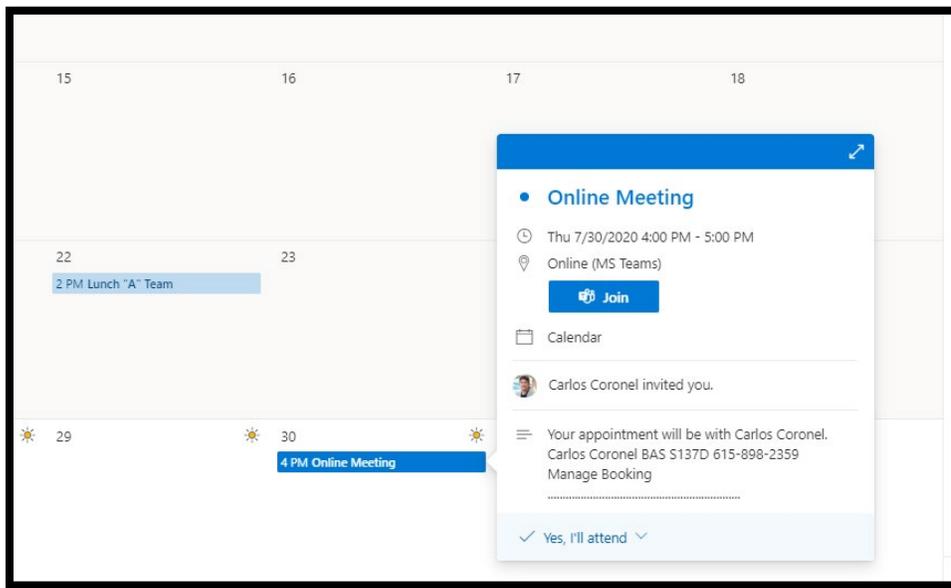
Emails Generated

Scheduling a meeting using *Bookings* generates several emails.

- The student receives an email, and he/she must confirm the meeting to add the entry in his/her Outlook Calendar.
- The teacher receives an email informing of the new meeting scheduled. Then, another email when the end-user confirms the meeting. *Bookings* will automatically add the meeting to the teacher's Outlook Calendar. Notice that if the meeting is an online meeting, the email contains a link to **"Join Teams meeting"**.

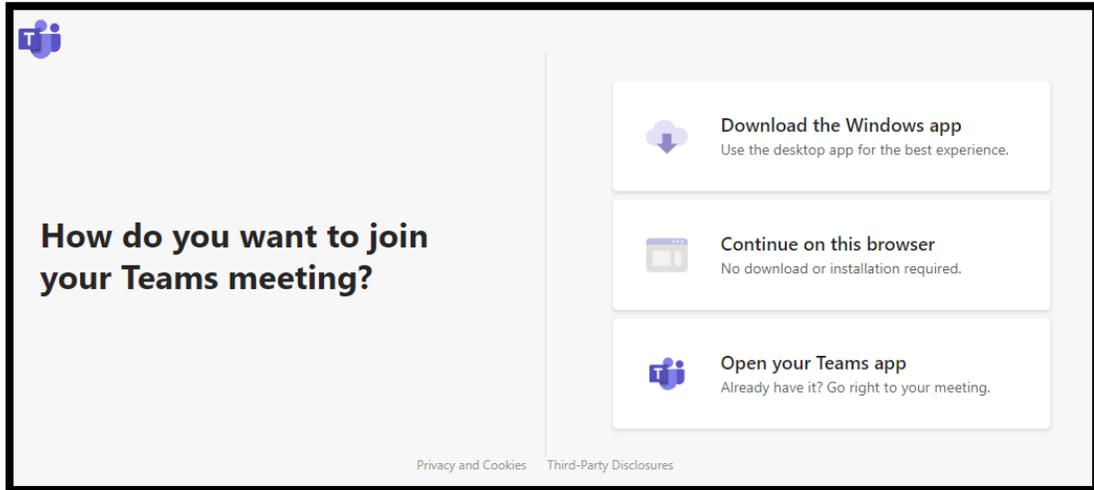


- The meeting will appear in the Outlook Calendar of both teacher and student. If the meeting is an online/virtual meeting, there will be a **Join** button to launch *MS Teams* in the calendar event details. See the picture below.



Joining the MS Teams Meeting

- The day and time of the meeting click on the **[Join]** in the calendar event or the **[Join Teams meeting]** in the email.
- If the teacher or student is not logged in to MS Teams, they will see this screen



- The best option is to run the full MS Teams application.
- **The teacher must log in to MS Teams client to start the meeting.** The *MS Teams* client program can be configured to start minimized in the Windows taskbar. This way, the *MS Teams* meeting will begin when the teacher clicks on the **Join** button.
- The picture below shows an example of an *MS Teams'* meeting online. Notice the controls are very similar to the Zoom controls. It is recommended that both the host and attendee run the MS Teams client program to have the full features.

