What is Microsoft Bookings?

Bookings is a scheduling tool that is a part of Microsoft 365. See more about Microsoft 365 at uOttawa here. Bookings allows units to create a calendar so that users can book appointments with their services through a designated bookings webpage.

How do I access Bookings?

Bookings is accessible through your uOttawa Microsoft 365 online account. Use your uOttawa email address, password, and chosen multifactor authentication device to log-in.

Things to keep in mind when using Bookings

- **Do not keep notes of your encounters/appointments in the notes sections of Bookings**. Only keep general notes about the appointment, since these notes are visible to all staff assigned to that service. Information of long-term value, or confidential information should not be managed in the Bookings application.

- **You must configure your bookings page to include an information collection notice.** The collection notice must include the following three requirements:
    - o The legal authority for the collection;
    - o The principle purposes for which the personal information is intended to be used;
    - o The contact information of an employee of the University of Ottawa who can answer questions about the collection.

Customer data usage consent

☐ Show a personal data collection and usage consent toggle along with a message on my booking page

Enter your personal data collection and usage terms here.

For more information on collection of personal information, consult the Access to Information and Privacy Office's website.

For more on how to manage your information, see the Information Management Handbook.

How do I use Bookings?

Create and add a Booking calendar

Log-in to your Microsoft 365 account and open the Bookings application. This is where you create a new booking calendar for yourself or your unit. A Booking calendar can have more than one service. Ex. An academic unit can have a tutoring service as well as office hours as separate services within the same booking calendar.

Bookings is highly customizable depending on your needs. Here are the steps and basic instructions for setting up a Bookings page once you have added a bookings calendar:

Step 1: Enter your business information

Enter the address and business hours of your service or unit.

🧳 Business Information

Step 2: Set your scheduling policies

This is where you set the length of appointments, acceptable lead and cancellation times, and automatic notifications of booking changes.

🖥 Booking Page

Step 3: Define your service offerings

At this stage you set a service name, description, location (choose whether you want to meet in person or have an online meeting), duration, default reminders to users and staff, internal notes about the service, etc.

🔧 Services

Step 4: Create your staff list

Add and remove staff members that you would like to assign to certain services. It is a good idea to select the option "events on Office calendar affect availability" when you create a staff profile. This means that customers will not be able to book appointments if their calendar is not free during that time-slot. **Note that the customer does not see the actual calendar or its contents.**

👥 Staff

Step 5: Set employee working hours

Ensure that staff availability is accurately represented in your calendar when you or your users try to book them for services.

Step 6: Schedule business closures, time off, and vacation time

Close your business for holidays or team events, or staff time off.

📅 Calendar

Step 7: Publish or unpublish your booking page

The booking page is the page on your web site where customers can schedule appointments with your business. Embed this bookings page onto your website so it is accessible to customers, and publish and un-publish this page whenever you need to.

⬆ Save and publish   ⬆ Unpublish   </> Embed

Step 8: Create and staff your bookings

Bookings can be done by the customer through your embedded bookings page, or manually by staff if a customer calls or emails to book an appointment.

⊕ New booking ⌄

Learn more about Bookings here.