MICROSOFT BOOKINGS

Appointment Booking at the MIT Sloan Help Desk

Disclaimer: I am not an expert, this is my experience, and these are my opinions :)

GETTING STARTED

- Available to all MIT Microsoft 365 Account Holders with A3 Licensing***
- Get started today at https://outlook.office.com/bookings/
- Will work with on-prem users – in addition to Exchange Online mailboxes
- Helpful documentation found (thanks UCONN!):
  - https://kb.uconn.edu/space/IKB/10817011782/Microsoft+Bookings

***A3 licensing is limited to Full Time MIT community members – Temps/Affiliates do not have access by default

SIMPLE BUT CUSTOMIZABLE

Bookings is simple on the surface, but I've been pleased with the level of configuration options available.

- The main parts of the Booking Tool:
  - Business Information – Basic info on the "business" including contact info, logo, default business hours
  - Booking Page (Client Facing): Availability, Access Controls, Branding (Colors), Global scheduling policy, region/time settings
  - Services – Define what services can be booked through the Bookings Tool. Each service can be highly customized
  - Staff – Add in all your staff who will (a) deliver the services or (b) manage the booking process
  - Custom Fields – Additional questions you want the customer to provide on a PER SERVICE basis. Can be optional or mandatory.
  - Calendar – The Resource calendars everything rolls up to. This calendar is available in Exchange as well (to view from Outlook)

CLIENT FACING BOOKINGS PAGE

Sloan Technology Services

⊘ SELECT A SERVICE

Walk-in Appointment ○

Schedule a visit to the STS Walk In Center, a... Read more
30 minutes

30 min - Remote Troubleshooting Appointment ○

Brief appointment to help an STS Technicia... Read more
30 minutes

1 hour - Remote Troubleshooting Appointment ○

Extended troubleshooting session for comp... Read more
1 hour

New Hire: Computer Setup ○

New computer setups for new hires, or whe... Read more
1 hour

Replacement Laptop: Setup & Data Transfer ○

Are you getting a replacement laptop? Sch... Read more
2 hours

Select a service to see available dates and times

⚇ SELECT STAFF (OPTIONAL)

DEMO: BUSINESS INFO & BOOKINGS PAGE

STAFF

Who will be managing your Booking Service, or available to be booked.

- Booking Access Level

- Notifications

- Important: Calendaring availability - allow personal calendar to impact booking availability

- Custom hours (or default)

SERVICES

- Service Details, including description (as shown on Bookings Page), time length, number of "slots" (attendees)

- Availability Options - Follow the default, or customize per service

- Assign Staff (per service) and choose if bookers can choose a staff member by name

- Choose fields, both default fields and custom fields created (per service)

- Define reminders and custom notification messaging

DEMO: STAFF & SERVICES
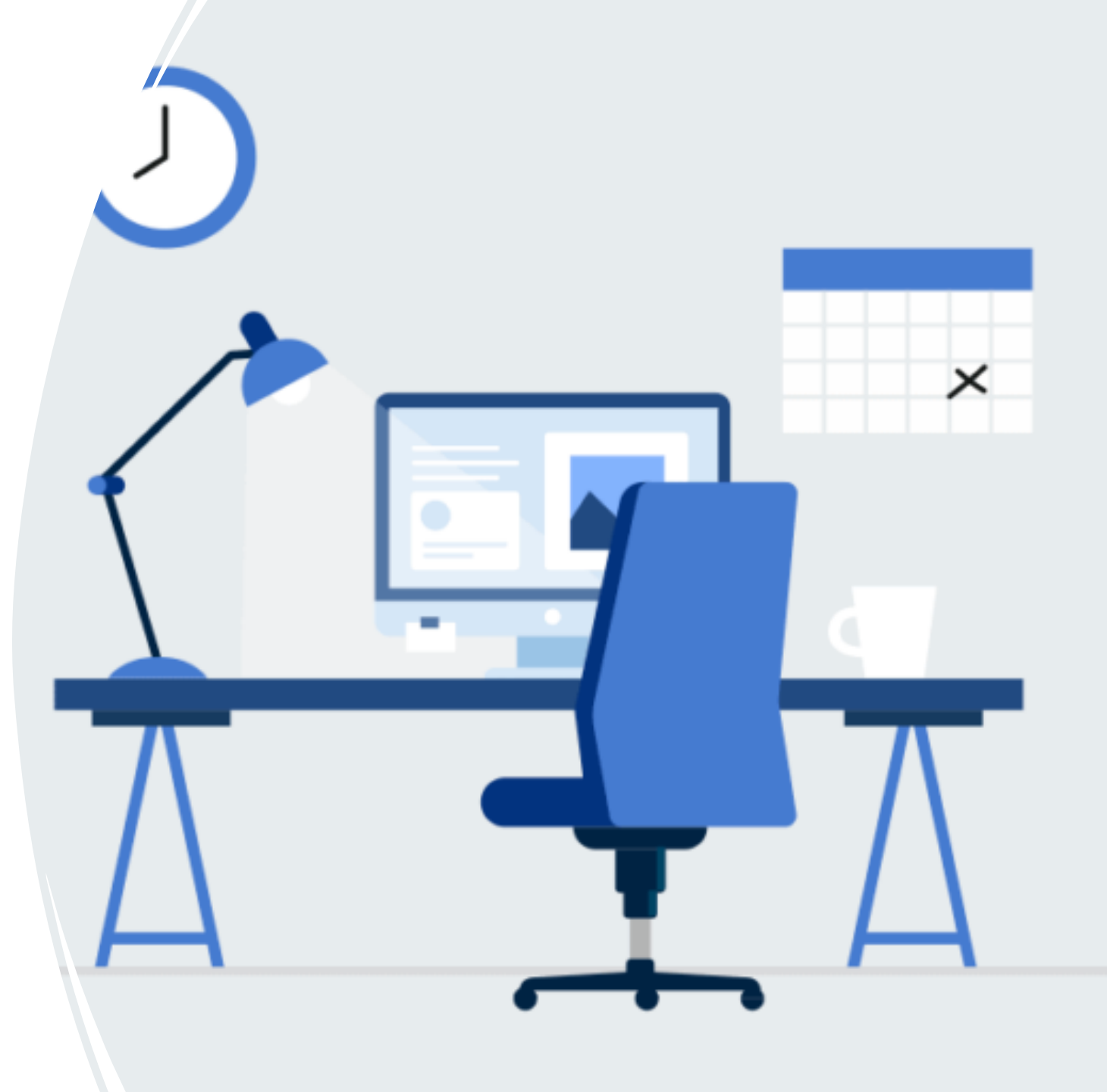
LESSONS LEARNED TO-DATE

- Requires <u>ACCURATE</u> personal calendaring. Your availability (or lack of) feeds the bigger system. Your calendar must be accurate to ensure an accurate central service.

- Licensing for Temps

- Email Notifications do not contain custom fields - must go to the booking to review custom details

- Best Practice to manage bookings on the web using the tool, not through direct calendaring

- Tool goes a good job of offering the option to apply a global option (ie. Scheduling, business hours) or deviate from global and set custom.

- No good way to make someone unavailable based on remote/on campus - Example: Unavailable from walk-in service on Mondays, but available for the other services that date.