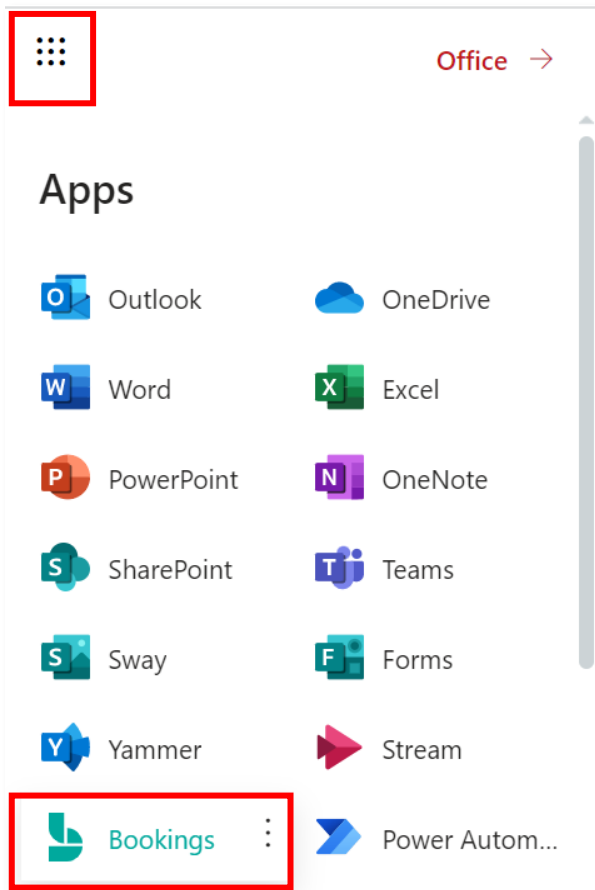


Microsoft Bookings for Parents Day

Accessing Microsoft Bookings

Open your browser, log on to **office.com** using your iLearn account, click on the **app launcher button** and select **Bookings**.



Creating a New Booking Calendar

If this is the first time using Bookings, click on **Create a New Booking Calendar**. If you already have a calendar you do not need to create a new calendar, you can use last year's calendar

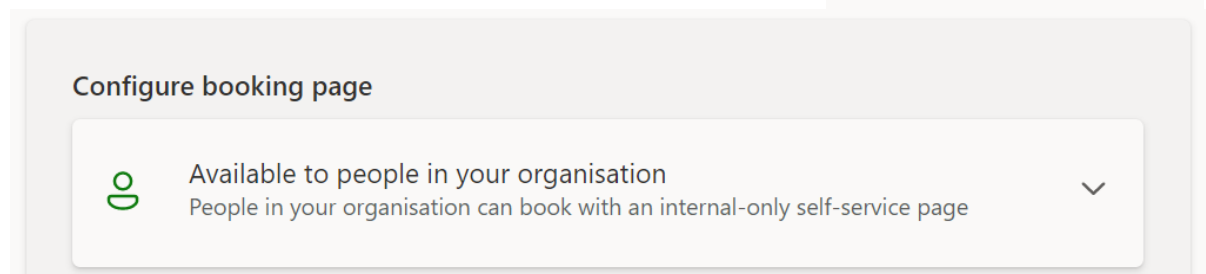
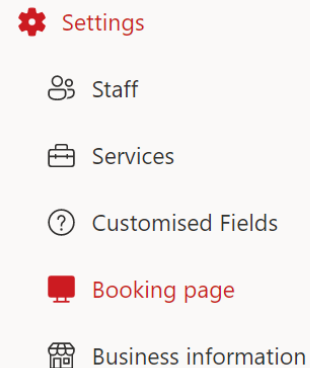
- Give a name to your calendar, e.g. Parents Day
- Add a logo.
- Set business type to Education.
- Add your services skip this part and click Continue
- Who can book appointments? - set to People in my Organization.
- Click Complete Setup.

Setting up Microsoft bookings for Online Parent's Day Meetings

Booking Page

From the Settings menu click on **Booking Page**

Set **Configure booking page** to Available to people in your organization. This will only allow guardians to access the booking page only after they enter a valid iLearn account.



Default Scheduling Policy

- **Time Increments:** These are the time increments that will be available for booking the meetings. Ideally this would be equivalent to the duration of the meetings. Example 10 minutes.
- **Minimum Lead time:** Guardians cannot book after the Minimum Lead time. For example, the guardians will not be able to book 24 hours before the parent's day.
- **Maximum Lead time:** How many days in advance is the guardian allowed to make a booking. For example, setting the Maximum Lead time to 7 days will allow Guardians to make a booking 7 days before the Parents' Day.

- **Email Notifications**

Tick **Send a Message Invite to Customer**. Once this is ticked the guardians will receive an email with the link for the meeting. It is important that guardians enter a valid email address, ideally, we recommend that they enter the student's iLearn account so that all the bookings will be easily accessible from the student's Teams calendar.

- **Staff Control**

Tick allow customers to choose a specific person for booking

- **Availability** set General Availability to Not Bookable

- **Availability during these dates:**

Set both the **start date** and **end date** to the day of the date of the Parents' Day.

Set to **Customised Hours (recurring weekly)** from the drop-down menu.

Set the available hours next to the day of the week of the Parents' day. These are normally the duration of the Parent's Day with the breaks factored in.

Example:



Default scheduling policy

Default scheduling policy, availability, notifications and staff settings

Time increments

Show available times in increments of

10 minutes



Minimum lead time

Minimum lead time for bookings and cancellations

24 hrs



Maximum lead time

Maximum days a booking can be made advanced in

7 days



Email notifications



Notify the business via email when a booking is created or changed



Send a meeting invite to the customer

Staff control



Allow customers to choose a specific person for the booking

Availability

In general, a service can be booked when its staff are free. If you wish to customise this further, you can do so below.

General availability:

Not bookable



Availability during these dates:



Start

End (inclusive)

14/01/2022



14/01/2022



Customised hours (recurring weekly)





Monday	Not bookable		+
Tuesday	Not bookable		+
Wednesday	Not bookable		+
Thursday	Not bookable		+
Friday	08:00	12:30	+
	13:00	14:30	+
Saturday	Not bookable		+
Sunday	Not bookable		+

The above shows an example of a Parents' Day held on the 14th of January from 08:00 till 14:30. Since the 14th of January is a Friday, we set the available hours on Friday and we exclude the break.



Region and Time Zone:

Make sure that the **current time zone** is set to (UTC+01:00).

Tick **Always show time slots in business time zone**.



 **Region and time zone settings** Choose your booking page language and time zone settings 

Language Current time zone

English (United Kingdom)  (UTC+01:00) Amsterdam, Be... 

Always show time slots in business time zone

Remember to scroll all the way up and click SAVE to save your settings.

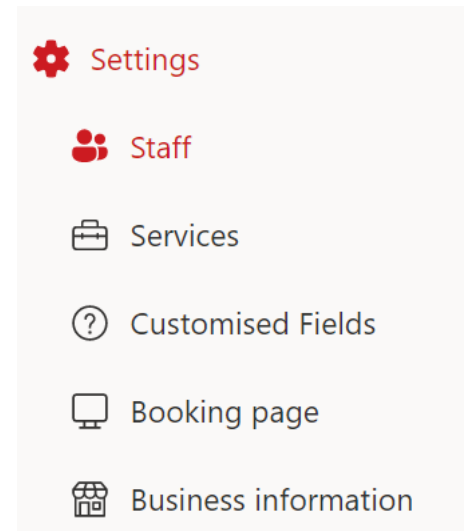
 **Save**  Discard

Staff

From the Settings menu click on **Staff**.

This is where you add all the staff members that will be taking part in the Parents' Day. To add staff, click on **+Add new staff**.

- Type the name of the staff member and select him/her from the list.
- Enter the initials
- Set the Role as Viewer. If you need this member of staff to help you with the Bookings system, you can assign Administrator rights.
- If needed, tick or untick **notify staff member via email when a booking assigned to them is created or changed**. When ticked the staff member will receive an email every time a Guardian makes a booking.
- Untick **Events on Office calendar affect availability**.
- Tick **Use business hours**.
- Click on **Save Changes** to create the staff member entry.



Add staff ✕

Joe Micallef ✕

JM

Orange Dark ▼

joe.micallef@ilearn.edu.mt

Viewer
Viewers can see all the bookings on the calendar. They can't modify or delete them. They have read-only access to settings.
▼

Notify the staff member via email when a booking assigned to them is created or changed

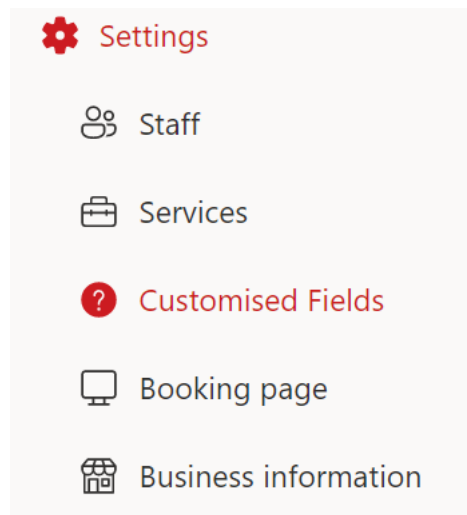
Availability

Discard

Save changes

Customised Fields

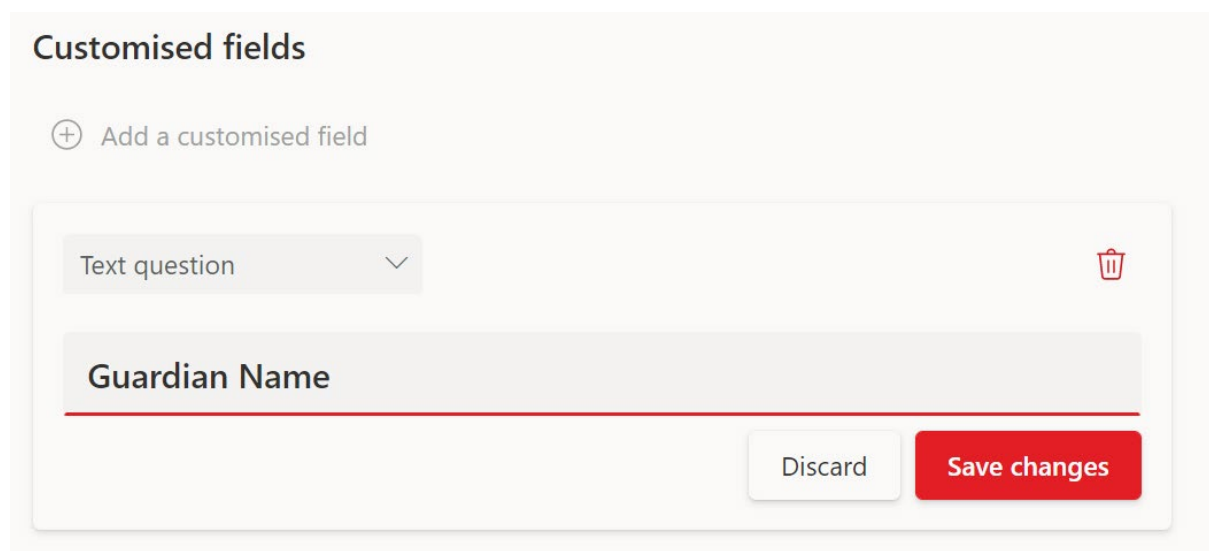
From the Settings menu click on **Customised Fields**.



A vertical menu with a light grey background. At the top is a red gear icon followed by the text 'Settings' in red. Below it are five items, each with an icon and text: 'Staff' (people icon), 'Services' (briefcase icon), 'Customised Fields' (red question mark icon, text in red), 'Booking page' (computer monitor icon), and 'Business information' (storefront icon).

Whenever a guardian books a meeting with a teacher, he/she will be asked to enter some details such as the Student Name and the Student Email. You can use Customised Fields to ask the guardian additional questions using drop down or text question fields. Additional questions can include Guardian Name and Surname, Student Class etc. These fields can later be added to the services.

Click on **Add Customised Field**, from the menu select Text Question or Drop-Down question. Type the **Question** and click **Save changes**.



The 'Customised fields' interface. At the top left is a plus sign icon and the text 'Add a customised field'. Below this is a form with a dropdown menu set to 'Text question' and a trash can icon to its right. A text input field contains 'Guardian Name'. At the bottom right of the form are two buttons: 'Discard' and 'Save changes'.

Drop-down question ▼ 🗑️

Class

3.1 🗑️

3.2 🗑️

3.3 🗑️

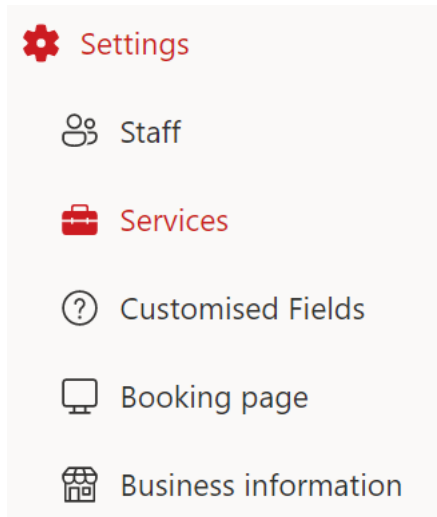
⊕ Add option

Discard Save changes

Services

Services is a way of grouping teachers by subject. One teacher can belong to more than one service. When Guardians book appointments they first choose the service (the subject) and then the teacher belonging to that service.

From the Settings menu click on **Services**.



- Click on **+Add New Service**
- In the **Basic Details** tab, type the name of the service e.g. Chemistry.
 - Tick **Add online meeting**.
 - Set the **Duration** of the meeting.
 - Tick **Use the default online scheduling policy**.
 - Tick **Show this service on the booking page**.

Add service

 A screenshot of the 'Add service' form. On the left is a sidebar with a menu icon and five options: 'Basic details' (highlighted in red), 'Availability options', 'Assign staff', 'Customised fields', and 'Reminders and notifications'. Below the sidebar is a 'Default scheduling options' section with a red toggle switch and the text 'Use the default online scheduling policy'. The main form area has a header with a briefcase icon and the text 'Chemistry'. Below the header are three input fields: 'Description', 'Location', and 'Add online meeting' (with a red toggle switch and an information icon). At the bottom is a 'Duration' section with a clock icon and three input fields: '0' days, '0' h, and '10' min, each with up and down arrows.

Publishing options

Show this service on the booking page

Buffer time

Price not set

Notes

Maximum number of attendees

1 attendees

Let customers manage their appointment when it was booked by you or your staff on their behalf.

From the **Customized fields** tab:

In the Customer Information section, tick the fields that you would like to be entered by the Guardian to book the appointment. Some fields can be set as Required if needed.

It is important to tick **Customer email** and set this to **required**. This is the email where the invite for the online meeting will be sent. We suggest that the Guardian inputs the student iLearn email in this field so that the meeting links will be easily accessible through the student's Teams Calendar.

Under Customised Fields you can add the customized fields previously created in the Customised Fields menu. Tick **select** to select the field and tick **Required** to make this a required field. You can change the order of the fields by pressing the arrows.

Customised fields

2 required and 0 optional customised fields selected.

Selected

Required
 ↑
↓

Guardian Name



From the **Assign Staff** tab:

Tick the staff members that are part of this service. In this example, tick the teachers that teach Chemistry.

Assign staff to the service

Allow customers to choose a particular staff for booking

Search for a staff member

-  Andre Bugeja
-  Joe Micallef

Discard

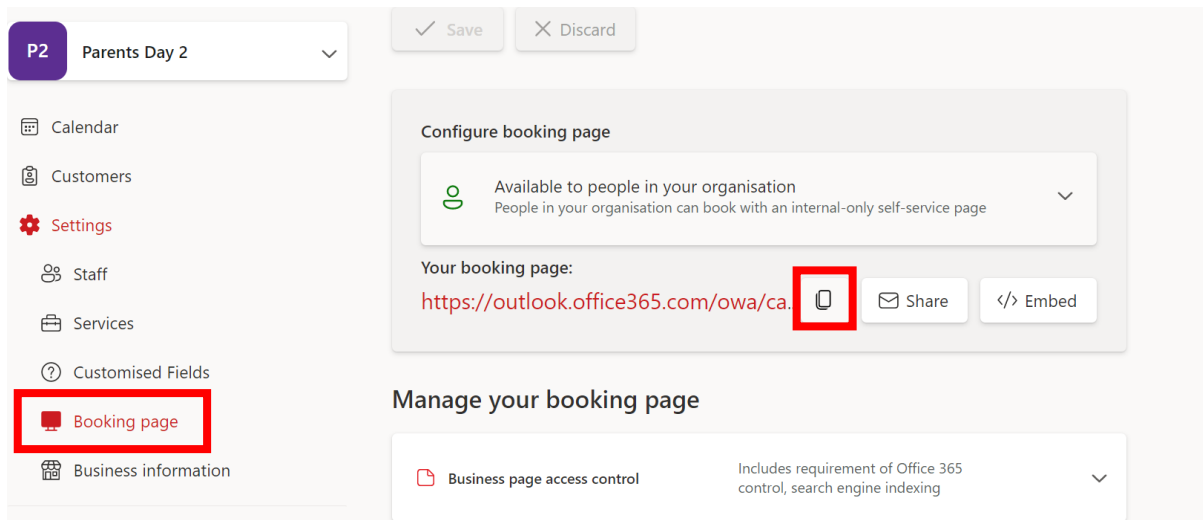
Save changes

Finally click **Save changes**.

Note: If you are using Bookings for the first time you may have a demo service called Initial Consult. Please delete this service.

Sharing the Booking Page

The link for the booking page can be obtained from **Settings – Booking Page**. Simply Copy the link and send it to your audience via email.



Note that you can also use this link to see how the Booking Page looks before sending it to the Guardians.