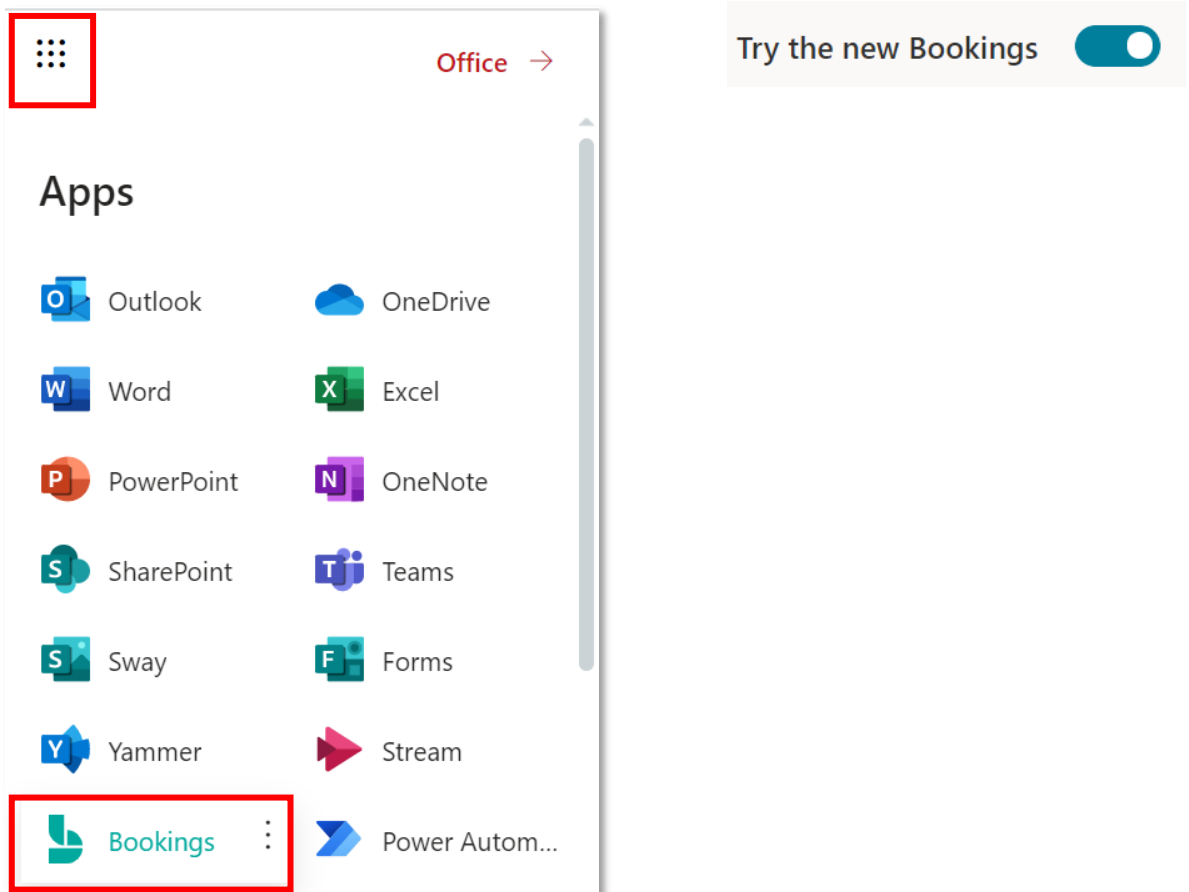


Microsoft Bookings for Parents Day

Accessing Microsoft Bookings

Open your browser, log on to **office.com** using your iLearn account, click on the **app launcher button** and select **Bookings**. Switch on **Try the new Bookings** if you are still using the old interface.



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. When setting up a calendar for the first time, the wizard will guide you through the following settings:

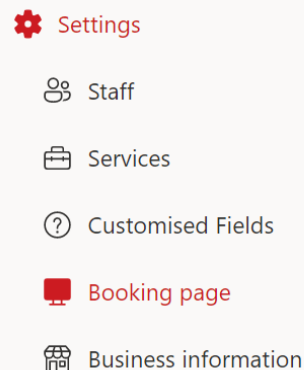
- Give a name to your calendar, e.g. Parent's Day
- Add a logo.
- Set business type to Education.
- Add your services - skip this part and click Continue
- Who can book appointments? - set to People in my Organization.
- Click Complete Setup.

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.



Configure booking page



Available to people in your organisation

People in your organisation can book with an internal-only self-service page



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 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.

Delete the days that are not bookable by clicking on the bin. These days will appear as Not bookable.

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



The day of the Parent's day.

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



Here the Parent's day will be held on a Friday. The rest of the dates must be Not bookable.

Here we omit the break from 12:30 till 13:00.

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 so that Guardians won't be able to book meetings during 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.

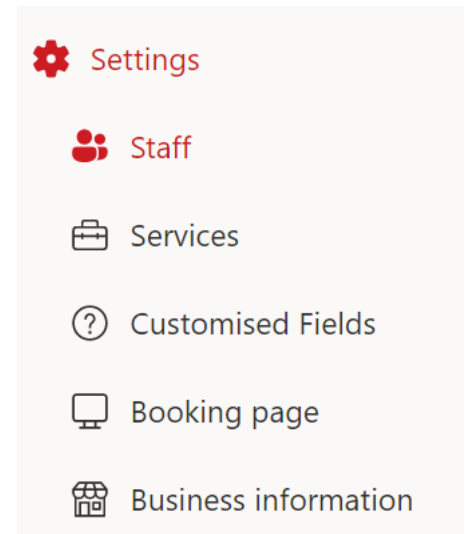
 **Save**  Discard

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

☎ Phone number

👤

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

Modifying Individual Staff Availability

Some educators may not be available for the whole day. You can edit their availability individually.

- From the Settings menu select Staff and edit the staff entry.
- Scroll down and turn off **Use business hours**. This will enable you to enter the availability of the educator.
- Delete all days when the educator is unavailable.
- Enter the availability of the educator as needed. You can add additional time slots by pressing +.
- Finally click **Save Changes**.

Edit staff

Use business hours

Turn off Use business hours

Turn off business hours to edit availability

Monday	Closed	+	Unavailable days should appear as closed.
Tuesday	Closed	+	
Wednesday	Closed	+	
Thursday	Closed	+	
Friday	<div style="display: flex; justify-content: space-between; align-items: center;"> 12:30 ▼ 14:30 ▼ </div>	<div style="display: flex; align-items: center; justify-content: center;"> 🗑️ + </div>	Enter the time slots that when the educator is available.
Saturday	Closed	+	
Sunday	Closed	+	

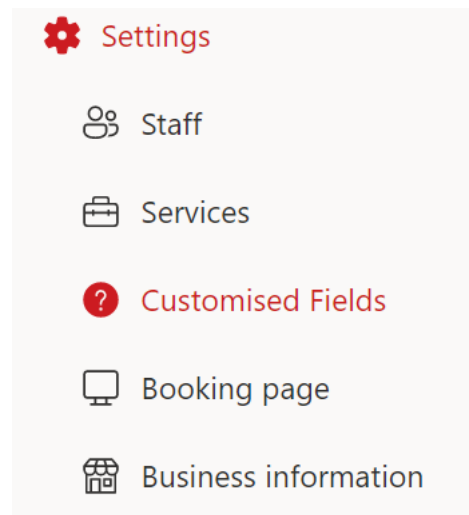
Discard

Save changes

In this example the educator is only available on Friday between 12:30 and 14:30.

Customised Fields

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

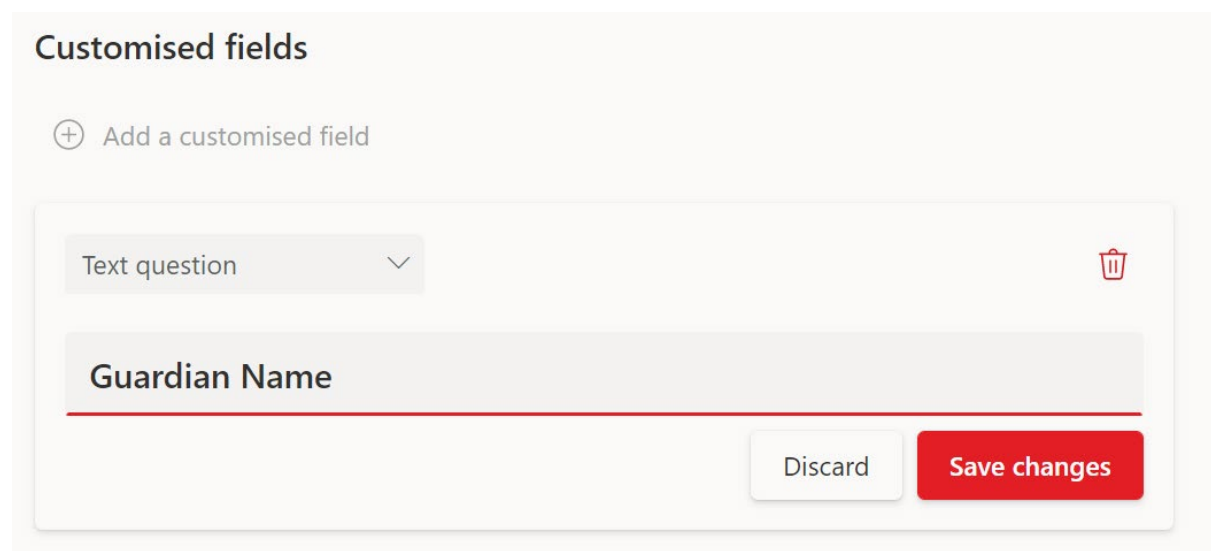


A vertical settings menu with a light grey background. It contains five items, each with an icon and text. The 'Customised Fields' item is highlighted in red. The items are: Settings (gear icon), Staff (people icon), Services (briefcase icon), Customised Fields (question mark icon), Booking page (monitor icon), and Business information (store icon).

- Settings
- Staff
- Services
- Customised Fields**
- Booking page
- Business information

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, there is a title 'Customised fields' and a button with a plus sign and the text 'Add a customised field'. Below this is a form for creating a new field. The form has a dropdown menu set to 'Text question' with a downward arrow and a trash icon to its right. Below the dropdown is a text input field containing '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 🗑️

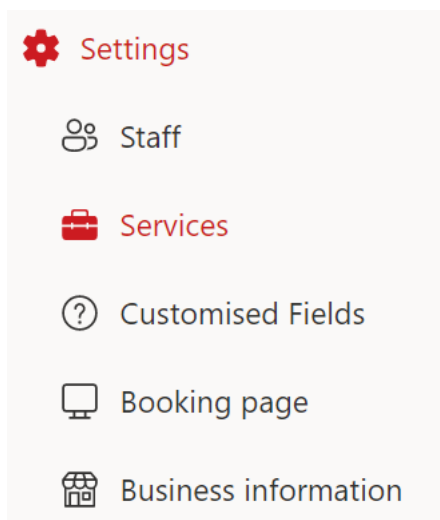
⊕ Add option

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 educator 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 items: 'Basic details' (highlighted in pink), 'Availability options', 'Assign staff', 'Customised fields', and 'Reminders and notifications'. The main area shows the 'Basic details' tab with a briefcase icon and the text 'Chemistry'. Below this are three text input fields: 'Description', 'Location', and 'Add online meeting' (which has a red toggle switch turned on). At the bottom, there is a 'Duration' section with a clock icon and three input fields: '0' days, '0' h, and '10' min. A 'Default scheduling options' box on the left contains a red toggle switch and the text 'Use the default online scheduling policy'.

* Note: If this service will have a different Duration than the default duration policy set in the Booking Page tab, untick **Use the default online scheduling policy** and edit the **Time Increments** field in the **Availability options** tab, this must match the duration of the service.

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

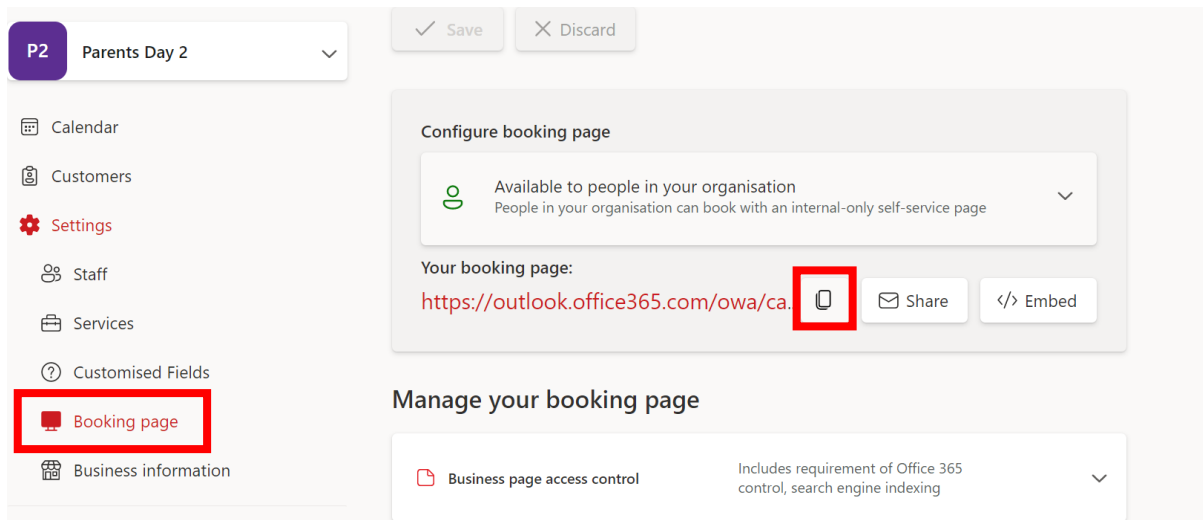
Save changes

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 the Initial Consult 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 the Parents/Guardians via email.



Tip: You can use the Booking Page link at any time to check how the Booking Page looks. We recommend that you test the link before sending it to the Guardians.