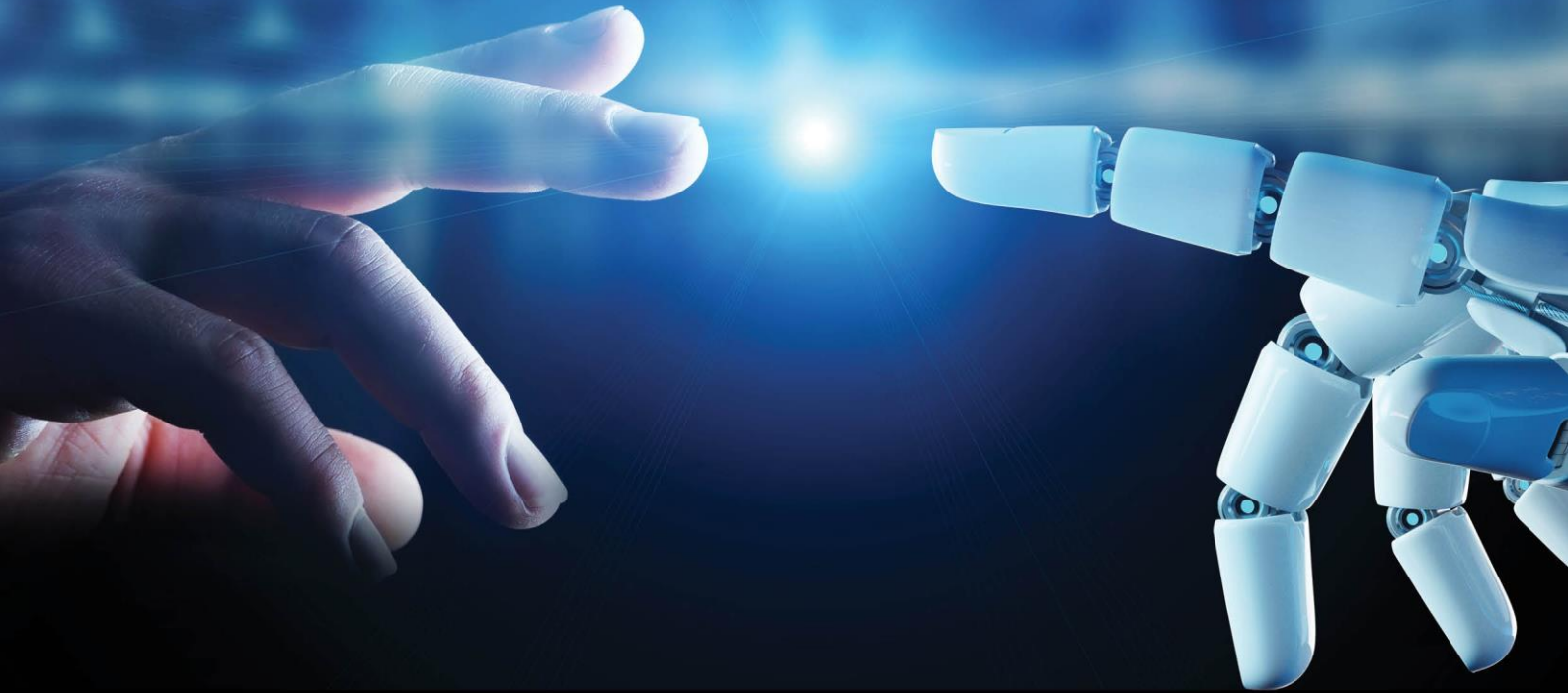


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QUEENSLAND DIGITAL ACADEMY

Microsoft Bookings Process Document

For Administrators

V1.0

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An electronic version of this document is available at [MNHHS Working Virtually](#)

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About Microsoft Bookings

What is Microsoft Bookings?

Microsoft Bookings is an application that functions as a scheduling tool a part of the Office 365 Suite available to Queensland Health employees, which enables it to integrate into Microsoft Outlook among other applications. This application was originally intended as a bookings tool for customers to book an appointment with a business, however, in a Metro North setting this is useful tool for automating bookings across many work areas.

When do I use Microsoft Bookings?

Microsoft Bookings can be used by your work area to streamline your booking process and automate correspondence to customers and staff. It should be noted that although setup requires a large initial investment the ongoing benefit lays in the establishment of set templates.

How do I get Microsoft Bookings?

Microsoft Bookings is available to all Queensland Health staff as a part of the Office 365 suite and accessible through the Office 365 homepage. [Accessing Microsoft Bookings](#)

Where can I find Microsoft Bookings resources?

Digital Metro North has developed support materials that can be found online [here](#).

Microsoft Bookings information can be found on the Microsoft homepage [here](#)

Bookings Calendar Setup

Microsoft Bookings requires initial investment into the calendar and business setup to ensure that the business information, services and staff are added correctly. [Setting up a calendar](#)

Business Information

Time in motion: ~3 minutes not recurring

Business Information consists of the contact details, logo and hours for your work area. All information that is entered in this tab will be used for the booking form, messages and reminders.

Required details

The only mandatory field is the Business Name with all other fields being optional, though it is required that the following information entered is at a minimum:

- Business phone: Preferably a generic number.
- Email address: Preferably a generic email address.
- Business hours: Maintain the default (Mon-Fri; 8am-5pm), changing this will impact the availability on the bookings page.

Recommended details

It is recommended that other relevant fields are completed to be able to provide as much information as possible to people booking.

- Business address
- Website URL
- Privacy Policy URL

- Terms and conditions URL
- Business Type
- Business logo: Upload a logo that will be used for all booking emails.

Services

Services are the appointment or meeting types that are available to be booked. These require significant initial setup as there are many options that can be modified within a service and compounds depending on the number of services being offered. [Managing Services](#)

Service details

When creating a service that can be booked the following details are visible by users, these options include a recommendation for inclusion for each option:

- Service Name: **Mandatory** field so users can differentiate between services.
- Description: **Recommended** to provide users a brief outline of the service type.
- Default location: **Not recommended** as the location will be viewable by users booking.
- Online Meeting: **Optional** as this will depend if the service is virtual or physical.
- Buffer time: **Recommended** as you can allocate a period before a service where you will not be bookable during this time for setting up.
- Customer management: **Optional** as this provides customers the option to change dates and times, limited use within MNHHS and **should not** be used when the customer is a patient.

Custom fields

Custom fields are useful for collecting additional data that you require for your booking. By default, the only required fields are customer name and email, with phone number address and notes being optional.

Custom fields can be added to the service when on the booking page and designated required or optional. When there are multiple information fields select/ deselect to toggle field's visibility on the bookings page, ensuring only the essential fields are listed. There is also the option to include added drop-down and free text questions.

Recommended Required fields

- Email: This forwards the booking confirmation and reminder to the customer.

Reminders and Confirmation information

Another advantage that Microsoft Bookings has is the ability to set confirmation and reminder emails, with the option to provide additional information in these communications.

Recommendations

- Reminders: Attendees (staff, customer and both) can be sent appointment and meeting reminders in the lead up to the booking. The reminder period, the group of people these are sent to and reminder message can be modified.
- Confirmation information: Within the confirmation email additional information can be added and this is an ideal space to include any useful hyperlinks or resources for attendees.

Publishing options

Any service that has the 'Show this service on the booking page' enabled will display on the Bookings page and be accessible by the end users of the page.

Online Scheduling Options

The online scheduling option applied to a service are by default the same as the scheduling policy that is set in the Booking page. Changing the scheduling policy in the Booking Page will cause a change in the service scheduling policy when using the default scheduling policy. If a service has the default scheduling policy disabled, these settings can be changed. The scheduling policy dictates when and who can be booked on the Bookings Page for any given service. [Online Scheduling](#)

Scheduling Policy

The scheduling policy sets when a customer can book services setting the lead times and time increments. The scheduling policy will default to what the scheduling policy is for the Booking Page. If specific services require a modified scheduling policy this can be done from the service settings.

Recommendations

- **Not recommended** to adjust time increments, minimum and maximum lead times at a service level unless the service is unique, and it is required. **Recommended** to control or modify the scheduling policy at the Booking Page level, so it applies to all services.
- Time increments: **Not recommended** to change the increments at service level unless the service is unique.
- Minimum and Maximum lead-time: **Not recommended** to change the increments at service level unless the service is unique.

Email notifications

The default options for email notifications are the same as what is set in the Booking Page. Even when not using the default policy these options should always be enabled to ensure that all parties are aware of the new booking.

Staff and availability

The default option for Staff and availability is determined by the Bookings Page scheduling policy, though these can be modified when the default options are not being used. At the service level, staff can be assigned to specific services, so that when this booking is created that staff member will always be assigned to that booking.

Microsoft Bookings can be oriented towards a staff member or a service. A people-oriented work area will allow users to specify who they would like to book with. A service-oriented work area will allow users to select a service and the staff member is assigned during the service setup.

Recommendations

- Staff: **Optional** as this option should be enabled when users are required to specify a staff member (staff-oriented) and disabled when required staff are assigned to specific services (service-oriented)
- Availability of bookings are generally available when staff are free, however, they can be customised from a staff or service level:
 - o General Availability:
 - Staff-oriented: **Recommended** to maintain 'Bookable when staff are free' option and staff to manage their calendars to indicate times to not be booked.
 - Service-oriented: **Recommended** to customise the hours that the service is available on when services are restricted by day or time.
 - o Availability during these dates:
 - Staff-oriented: **Not recommended** to modify this option as staff should manage their calendars to indicate times not to be booked.
 - Service-oriented: **Optional** only when the service has temporarily changed availability, if this is a long-term change consider adjusting the general availability.

Staff members

Adding staff members to the Booking calendar is essential, as the staff list are the people available to be booked through Microsoft Bookings. Once a staff member has been added an email will be automatically sent to the staff email to approve bookable status. Depending on the type of business will determine what staff are added:

- Staff-oriented: A staff member's Queensland Health details should be used when adding their contact email to the Staff tab for bookings that are person specific e.g. Metro North Peer Responder Program.
- Service-oriented: Generic email addresses should be used when adding contacts to the Staff tab for a work area where the booking is not person specific e.g. virtual clinics.

Staff need to be added to the bookings system as an Administrator first. Once the staff member has accepted their membership, their access can then be changed to a Guest.

Email notifications

Administrators can set if staff receive an email when a booking has been assigned to them, is created or changed, it is recommended that is enabled for all staff to alert them to the booking.

Permissions

There are three levels of staff access:

- Administrator: Can edit all settings, add and remove staff, and create, edit and delete bookings.
- Viewer: Can see all the bookings on the calendar. They cannot modify or delete them. They have read-only access to settings.
- Guest: Can be assigned to bookings but they cannot open the bookings mailbox/ calendar.

Your work area and workflow will determine what and who will have each type of permission, noting that Administrator should be reserved for a limited group of people that are able to manage Booking calendar settings.

Availability

When an Administrator adds a staff member the staff availability can be set, using the Microsoft Outlook Calendar availability and/ or setting business hours.

Recommendations

- **Recommended** to enable 'Events on Office calendar affect availability', so personal calendar will determine availability rather than Administrators needing to regularly maintain business hours.
 - o **Optionally** can also enable 'Use business hours' if the staff member is regularly not available certain days.

Customers

All customers that are booked in for a service will have their details added to the customer database only viewable by staff with Viewer permission and editable by Administrators. This is useful when booking services with regular customers, however, this tab has limited use beyond that function. It is not recommended that the Customer tab is used widely.

Bookings page

The Bookings page is where users can book their own services, selecting the service type, date, time and normally staff member. This gives users the agency to book times that best suits them. It important that all the information regarding the business, services and staff is included and correct as once the Booking page is published and distributed users will be able to book. Once all the settings have been finalised, publishing the page creates a link that can be shared, hyperlinked or embedded on a website for everyone to start booking on desktop or mobile device.

[Booking a Peer Responder](#)

Booking page access control

Depending on who are the users of you Bookings Page will enable users to need Microsoft 365 or Office 365 account. However, when embedding the bookings page ensure that 'require a Microsoft 365 of Office 365 account from my organisation to book' is disabled so it can be accessed. When embedding the bookings page HTML and IFrame code is already available.

Customer data usage consent

Enabling this feature is optional and will create a check box to be added to the Bookings Page.

Scheduling policy

The scheduling policy sets when customer can book services setting the lead times and time increments. The scheduling policy will default to what the scheduling policy is for the Booking Page. If specific services require a modified scheduling policy this can be done from the service settings.

Recommendations

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 - o Availability during these dates:
 - Staff-oriented: **Not recommended** to modify this option as staff should manage their calendars to indicate times not to be booked.

- Service-oriented: **Optional** only when the service has temporarily changed availability, if this is a long-term change consider adjusting the general availability.

Calendar

Administrators have calendar access which will show all bookings made over a day, week or month period. In calendar you can:

- Create bookings.
- Manage bookings.
- Delete bookings.

Once a service is created, Service and Staff oriented departments or work areas should manage bookings through a generic or personal Microsoft Outlook calendar, respectively.