

Transcript

00:00:00 Joe

The #ShiftShow captains log episode 11.

00:00:03 Joe

In today's episode we take you through Microsoft bookings and how it can help you manage your time, resources and in person or virtual appointments.

00:00:12 Joe

For services offered to your customers and crew mates.

00:00:15 Joe

Whether you're setting office hours with the counselor, scheduling away time on the holodeck, or offering an instructional class on tridimensional chess bookings can help.

00:00:25 Joe

These runs smoothly.

00:00:27 Joe

So it's time to grab your calendar for the shift show computer bookm.

00:00:49 Dewayne

Hey buddy, glad we could book this recording.

00:00:52 Joe

It's good to have some type of program that allows us to schedule this meeting so we don't forget that kind of import.

00:01:02 Joe

That's terrible.

00:01:05 Joe

Hey you started.

00:01:06 Joe

Off with with with booking.

00:01:08 Dewayne

Booking puns anyway.

00:01:10 Dewayne

Yeah, we're gonna talk about bookings today so bookings is, you know we're just gonna jump right into it.

00:01:16 Dewayne

Bookings is a uh scheduling tool and it's something that we really like a lot.

00:01:21 Dewayne

It's one of our, you know.

00:01:22 Dewayne

We say this about all the apps.

00:01:23 Dewayne

But it's one of our favorite apps 'cause we find it to be the most.

00:01:26 Dewayne

I would say practical functional.

00:01:29 Dewayne

Useful even, and so we thought we would highlight some of the ways that we use bookings and some of the ways that we try to encourage our our faculty, staff, users to use bookings in their life to make their life easier. 'cause it's really the goal right? Make everybody's life a little bit easier.

00:01:48 Joe

Yeah, I think we'll take you through some of the some of the changes and a little bit of the history of bookings.

00:01:54 Joe

It's been around I, I think at least since 2018, if not earlier. It's been around for a number of years.

00:02:02 Joe

But it got.

00:02:03 Joe

Its start in the business side of the Microsoft licensing world in the Business Standard business premium.

00:02:11 Joe

Those licenses as like you said, kind of a tool.

00:02:14 Joe

For booking appointments with a business massage tattoo uh.

00:02:22 Joe

Visit to hospital.

00:02:25 Joe

See your doctor, those kind of things is what it was really meant for.

00:02:29 Joe

Small, small businesses.

00:02:31 Joe

I think now it's it's moved a little bit into potentially for for hospitals.

00:02:35 Joe

But definitely small business world, so it didn't initially have a lot of the features you'd come to expect in more of an enterprise tool, but they've been slowly adding them.

00:02:47 Joe

I think one of the first biggest ones is making it so you could actually do an online appointment that wasn't one of.

00:02:52 Joe

The first things that it could.

00:02:53 Dewayne

Do I think it is important to?

00:02:56 Dewayne

Kind of cover the roots of bookings and it's it's you know, origin story.

00:03:00 Dewayne

If you will of coming from that small business.

00:03:03 Dewayne

Universe because when you see it in enterprise and education you might wonder like well, why doesn't it do this?

00:03:10 Dewayne

You know, 'cause that's not the way it started, so I think you know we we like to do the why behind things and I think that really helps understanding you know why bookings, looks and feels the way it does.

00:03:23 Dewayne

And that might just be our interpretation of it, but I feel like it's accurate, you know.

00:03:28 Dewayne

And there's there's some quirks to it, you know.

00:03:31 Dewayne

And and there's also some creative things that you can do with it too.

00:03:34 Dewayne

That we'll talk about.

00:03:35 Dewayne

Towards the end, but.

00:03:37 Dewayne

Yeah, bookings is.

00:03:38 Dewayne

You know like you said, started off in that business world and now we're finding ways that we can leverage it in education and get some really cool use cases out of it.

00:03:48 Dewayne

So I guess the first thing that we should do, like always, is how do we, Joe?

00:03:53 Dewayne

How do we get to bookings and and what would we what we would?

00:03:56 Dewayne

Do to start.

00:03:57 Joe

There's a few things that you need in order to use bookings.

00:04:01 Joe

First thing it has to be turned on and enabled for your organization, so it may not.

00:04:06 Joe

It may be disabled, kind of at the.

00:04:07 Joe

Tenant level

00:04:08 Joe

So that would be the first big piece that you need to work on.

00:04:13 Joe

You need a mailbox in the cloud, so if your mailbox has not been moved to the cloud.

00:04:20 Joe

If you've been hybrid and you have some users in the cloud and some users on premises, your mailbox needs to live in exchange online for this to work and licensing of course.

00:04:33 Joe

Is thrown in there. You're going to need an Office 365 or a Microsoft 365.

00:04:40 Joe

A3 A 5 E 3 E 5 and they have extended it to frontline workers so your F1 and your F3 can take advantage of bookings. Also along of course with the Business Standard or business premium licenses.

00:04:59 Joe

And the last little piece, which probably isn't a problem if you're in in this world and using these tools is you've got to have basically a A teams meeting policy.

00:05:10 Joe

You gotta be able to schedule teams meetings.

00:05:14 Joe

And have a license provisioned for that and.

00:05:16 Joe

A policy set.

00:05:18 Dewayne

That's, uh, that's an important thing to point out too. 'cause, like you, you mentioned before the the the online meeting aspect of this was kind of new because originally bookings was to schedule an appointment with me to come in to consume some service that ioffer, you know, as a business owner. And now it's way more versitile.

00:05:38 Dewayne

Than that, and in you know, 2021 when everything we're doing is online. Still, it's. It's nice to have this scheduling tool that you can use to schedule an online meeting now, and by default you can. You can make it a teams meet.

00:05:54 Dewayne

So when you set.

00:05:56 Dewayne

Up a bookings page, you know, again, looking at this through the lens of if I were like a customer or if I were a company offering a service to a customer, you're going to see a few things that might look a little weird.

00:06:08 Dewayne

The first thing that you're going to see is you know some categories of you have staff.

00:06:13 Dewayne

That are assigned to your bookings page and then you have services that you offer so that might look kind of out of place.

00:06:21 Dewayne

I guess at first, but again, thinking about the fact that this was a a business tool that will start to make more sense as as you go forward.

00:06:29 Dewayne

So the first I guess scenario that I'd like to.

00:06:32 Dewayne

About is just using bookings for yourself to allow people to schedule you for something.

00:06:40 Dewayne

We've seen this, you know.

00:06:42 Dewayne

I think office hours or faculty you know to be able to have open office hours so that anybody can book.

00:06:49 Dewayne

Them you could do that through.

00:06:50 Dewayne

This tool Joe you and I.

00:06:52 Dewayne

We use this in our email every single time we send.

00:06:55 Dewayne

An email, right?

00:06:56 Dewayne

I think it's a great way to use it.

00:06:58 Joe

Yeah, we take advantage of that.

00:07:00 Joe

We make ourselves open and available to our users and that's one easy way we do it.

00:07:06 Joe

We include, uh, a book me link to our.

00:07:10 Joe

Bookings calendar that anybody could come pick us up and spend some time with us.

00:07:15 Joe

A little bit of you know 30 minutes to an hour or consulting time and I think what I like about it with that aspect about booking yourself is.

00:07:28 Joe

Setting my own parameters around the time I want to be doing that, I can specify my own hours that I'm open for that, and the more I advertise that, the better chance I have meetings.

00:07:42 Joe

Taking place in the time that I want those to take place and I have feel like I have a little more control around my weekly schedule.

00:07:52 Dewayne

Yeah, there's a lot of granularity to defining your availability, and again one of those things that you'll see that tells you this was a business tool is when you go into the settings of your bookings page at the very bottom, you're going to see business information like where you would define your your businesses.

00:08:11 Dewayne

Operating hours, well, I'm not a business I'm Dwayne but my operating hours are from 8-5 or whatever it may be. So you can kind of set like this. I I guess we call it.

00:08:23 Dewayne

Uhm, where all services would have to fall within your business operating hours and then you could create if you could dial it in even further and say a specific service would only be available between these hours.

00:08:38 Dewayne

So you can have some really fine grained control over when people can book.

00:08:43 Dewayne

You so if anybody is listening and kind of having a little mini freak out.

00:08:46 Dewayne

Like I don't want people putting stuff on my calendar all the time.

00:08:49 Dewayne

Well, you can control it.

00:08:51 Dewayne

You could really zero in on when you want to offer those office hours or consultations or or whatever it may be.

00:08:59 Joe

I think along those lines, something to kind of understand too.

00:09:03 Joe

If this service is that.

00:09:05 Joe

It's sort of a proxy to your calendar.

00:09:08 Joe

It can look into your calendar and determine when you already have some type of meeting and not double book you.

00:09:17 Joe

Of course, you wouldn't want that to happen, so it can see into your bookings that you already have scheduled into your appointments that you've scheduled.

00:09:26 Joe

In other ways on your calendar.

00:09:28 Joe

But also I think it's important to understand what we've kind of seen.

00:09:32 Joe

Some people worry about is.

00:09:35 Joe

Someone who is one of your quote customers.

00:09:38 Joe

They don't have any knowledge as to what's on your calendar.

00:09:41 Joe

None of that is exposed in any way, just the fact that there's.

00:09:46 Joe

Available time slots, sort of.

00:09:49 Joe

The old exchange free busy time.

00:09:51 Joe

You kind of know when someone is available, but you may not actually know what they're doing, so just something to I think initially we've had some people kind of worry a little bit about that, but it's just sort of a proxy to your calendar, but doesn't really.

00:10:04 Joe

It doesn't expose those.

00:10:05 Joe

Meetings that are that are on there that aren't something to do with booking.

00:10:09 Dewayne

I think calendar proxy is an excellent way to describe it.

00:10:14 Dewayne

Just make that up.

00:10:15 Dewayne

'cause I haven't heard us say that before.

00:10:19 Joe

Doing some research trying to figure out ways to kind of kind of understand how this how this works.

00:10:24 Joe

'cause it does tie into and we'll talk about this.

00:10:28 Joe

You know, calendars that aren't yours.

00:10:31 Joe

Also on top of it, so we'll we'll dive.

00:10:33 Joe

Into that, yeah.

00:10:34 Dewayne

So when you're looking in the settings of your bookings page and you go to the staff menu, which is where you could add yourself.

00:10:43 Dewayne

Obviously when you create a bookings page, you'll be the only staff, but if you added other staff in there for more complex scenarios that will probably talk about there's a checkbox in the settings of each staff member.

00:10:54 Dewayne

And I believe now it's defaulted to on, but it says events on office calendar effect availability.

00:11:02 Dewayne

And this is what Joe is referring to, where if I already have some other appointment that I either blocked my calendar off for some reason, or it's another kind of call or whatever it may be that time slot won't even be visible on my services page where somebody is trying to book me for that service.

00:11:18 Dewayne

Like if I have meeting from one to two they can even see one to two as a time slot.

00:11:22 Dewayne

Because it knows my calendar is already busy, which is great if you if you live by your calendar, you will love this tool hands down.

00:11:32 Joe

I think it's important to right now maybe describe, maybe take us through.

00:11:37 Joe

Your services that you have just, I think, conceptually understand what what makes up a service and how do you decide.

00:11:48 Joe

I mean you can.

00:11:49 Joe

You can name a service you can.

00:11:50 Joe

Set times and dates and slots it's available.

00:11:55 Joe

I think kind of descriptively taking someone through that right now would be.

00:11:59 Dewayne

Good yeah, so on my calendar my bookings.

00:12:02 Dewayne

Page that I used just.

00:12:03 Dewayne

For Duane, the one that's in my email signature.

00:12:08 Dewayne

I have two services.

00:12:09 Dewayne

I have one service that's called a one hour meeting and one service that's called a 30 minute meeting.

00:12:14 Dewayne

And they're pretty self explanatory. Usually when people book me, it's because they have a teams question or Office 365 in general, and it's easier for me when someone says, hey, when can we chat?

00:12:28 Dewayne

You know I have a question or I'm working on a project.

00:12:30 Dewayne

When can you help me with it?

00:12:32 Dewayne

I say I can help you whenever you can book here and I just send them a link and it makes it makes that conversation so much more efficient.

00:12:41 Dewayne

You know people going back all the time and meeting polls and all that kind of stuff.

00:12:45 Dewayne

Now forget all that.

00:12:46 Dewayne

I just send them a say.

00:12:47 Dewayne

Just go schedule me here.

00:12:48 Dewayne

Anytime that you can book and and we'll make it happen.

00:12:51 Dewayne

So that's the thing that I love the most.

00:12:53 Dewayne

Is just the efficiency of communication there.

00:12:56 Dewayne

And then each one of these services is, you know, again, defined within my operating hours of when I'm usually at work, one of them has a duration of an hour, the other one has a duration of 30 minutes, and then they're both configured to be online meetings.

00:13:13 Dewayne

So when somebody books me on either one of those slots that automatically.

00:13:17 Dewayne

Schedules a teams meeting.

00:13:18 Dewayne

It sends them an invite.

00:13:19 Dewayne

It throws it on my calendar and then one thing it does is really cool is it does reminders.

00:13:25 Dewayne

So let's say they booked me for now.

00:13:27 Dewayne

This week

00:13:28 Dewayne

You know prior to that meaning, it's actually going to automate sending them reminders.

00:13:32 Dewayne

Hey, don't forget you book Duane for an hour to talk about.

00:13:35 Dewayne

You know whatever, they'll get a reminder of that, and so those are the only two services I use for my personal personal page, which is pretty straightforward and simple and easy, which is what I like.

00:13:49 Joe

Yeah, I initially had a couple of services that were based around.

00:13:54 Joe

Office 365 products that had been pretty popular at the time when I was kind of setting this up, I had a service for people who wanted help with forms and another one. Someone who wanted help with teams that I kind of went back and just consolidated.

00:14:09 Joe

Those, and instead I did sort of a little bit of a advanced portion of bookings where you can actually ask different questions of the person who's your customers.

00:14:22 Joe

You can add information in there you'd like to collect other than just their name and their email address.

00:14:29 Joe

And I just I try to collect what service they're interested in learning about or what you know what they're calling about and collect it that way instead.

00:14:40 Dewayne

Yeah, you can do a little bit of pseudo forms type of thing that it's it's referred to in the interface as custom fields, but you can do like a text or a drop down.

00:14:52 Dewayne

You know stuff like that where you can you can.

00:14:55 Dewayne

You can set it as required or optional, but you can request all kinds of various bits and pieces of information, which I think now is the appropriate time to say that in our episode we did on webinars, we noticed that the custom fields and webinars and the page in general look suspiciously familiar.

00:15:14 Dewayne

It looks a lot like bookings.

00:15:16 Dewayne

And bookings already has the capability of automatically scheduling an online meeting and sending reminders and stuff.

00:15:22 Dewayne

And so Microsoft we see what you did there and we don't blame you for it with if you already have a tool for it, why not reshape it and mold it into into something new?

00:15:32 Dewayne

But yeah, I'm pretty sure it's.

00:15:35 Dewayne

Webinars and bookings are probably the same thing under the hood.

00:15:38 Dewayne

So so yeah, you can use those to select or require different kinds of information from your from your folks.

00:15:46 Dewayne

So if you were offering various, you know specific product consultations, you could make those products available in a dropdown.

00:15:54 Dewayne

So if somebody says I need to know how to do morphing in PowerPoint.

00:15:58 Dewayne

You know they could select PowerPoint from the dropdown.

00:16:01 Dewayne

I left mine a little bit more.

00:16:02

I'll book that.

00:16:03 Dewayne

Yeah, we love more and we love PowerPoint but we we I went like a little bit more.

00:16:12 Dewayne

Chaotic approach I guess where I just left it like hey, whatever it is, you need.

00:16:16 Dewayne

Book it here.

00:16:17 Dewayne

But one thing that I do require is like a little notes field like an open text field where they do have to at least type in some sort of description about what it is that they want.

00:16:27 Dewayne

But they have to make it up in their own words and that gets added on the appointment.

00:16:32 Dewayne

That goes on my calendar so I can review it.

00:16:35 Dewayne

And actually kind of know what I'm going to be talking about before we talk.

00:16:39 Joe

Another use that we've seen here at our university is counseling offices.

00:16:46 Joe

Taking advantage of this.

00:16:50 Joe

Enabling students to book time with financial counselors.

00:16:57 Joe

Student health counselors and that seems to have taken off really well in that you know, handling those kind of categories again because it's it is.

00:17:08 Joe

So easy to you know, reduce the need to bounce a bunch of emails back and forth trying to set up time.

00:17:14 Joe

And I think even in their services they have set aside some particular individuals on their teams that are that specialize in in managing students with disabilities and things like that.

00:17:29 Joe

So students can help them choose someone who's going to be, you know, easier to help them when they're asking for assistance.

00:17:37 Dewayne

Yeah, that'll get into a I guess more complex bookings configuration, which would be again through the small business thing if we decided like we're a massage place and you want to book a one hour massage, you could technically add multiple employees to the to the.

00:17:58 Dewayne

And when somebody comes and selects that service, it will randomly choose one of those employees based on their availability.

00:18:07 Dewayne

So if Joe's already scheduled from, you know one to two and Dwayne's not, it'll just pick Dwayne.

00:18:13 Dewayne

Which kind of brings me up to one scenario that we originally tried to use bookings for that didn't work out so well, which was we wanted somebody to be able to book both of us.

00:18:21 Dewayne

You know, if they wanted a Shift show Council, you know consultation they could go to the shift show bookings page and it would book both of us and it.

00:18:30 Dewayne

It doesn't do that.

00:18:31 Dewayne

It just randomly picks.

00:18:32 Dewayne

One or the other, which was a little frustrating, but hey, you know we were trying to make it do something it wasn't designed to do, so I'll give it a pass.

00:18:40 Dewayne

But in the case of student affairs like you said there, there is a there is a checkbox that you can use that allows someone to.

00:18:50 Dewayne

Pick a particular staff member and so you could have a staff member that, like you said specializes in.

00:18:57 Dewayne

You know some I'm fluent in Spanish and so you can drop down and pick that particular staff member knowing that they're fluent in Spanish, which I think is really cool to to give you some to give the customer some control.

00:19:10 Dewayne

Over you know how their appointment is is handled, which I think is really neat.

00:19:16 Joe

Some of the.

00:19:16 Joe

Some features that have been changing recently too, I think would be great to talk about.

00:19:22 Joe

We've seen again these slow changes for bookings with the ability to do an online booking.

00:19:31 Joe

The other one that had happened a little while ago was the ability to have.

00:19:36 Joe

Multiple people book the same.

00:19:41 Joe

Service at the same time and that was sort of a way that you could almost do a webinar registration.

00:19:51 Joe

Previously you could set up a service to handle a maximum of 50 people, and you could set it to have a single.

00:20:02 Joe

Date single time that was actually available and the 1st 50 people to to book that were basically registered.

00:20:12 Dewayne

You know we have a group on campus that has specific time slots that they provide a orientation or a facility, and you know every every Tuesday from 2:00 o'clock to 3:00 o'clock, you know, or every Thursday from 2:00 o'clock to 3:00 o'clock and and they set a maximum occupancy.

00:20:33 Dewayne

On that service, and so it it allows them to kind of control the.

00:20:38 Dewayne

Blow it allows the customer to book whenever it's convenient for them, but from their perspective it makes sure that they don't exceed any kind of capacity limit of how many people can we.

00:20:49 Dewayne

You know effectively provide an orientation for at the same.

00:20:51 Dewayne

Time and so?

00:20:53 Dewayne

Yeah, that's a really cool thing, but we did notice one thing about this that was kind of a quirk I guess was.

00:20:58 Dewayne

When you initially create a service.

00:21:01 Dewayne

If you leave the maximum, the maximum attendee count at one, you can't ever increase it.

00:21:09 Dewayne

You have to make it at least 2.

00:21:11 Dewayne

And then from that point forward, then you can modify it.

00:21:14 Dewayne

Now it's not a hassle to delete a service and recreate it, it doesn't break anything.

00:21:19 Dewayne

It's really not that big of a deal, but it was just kind of a quirky behavior that we noticed was if it's set to one from the get go, it's going to be one forever.

00:21:27 Dewayne

So just if you run into that, keep that in mind.

00:21:31 Joe

Now, can you set that at two and bring it back down to one you just got to do it initially greater than one.

00:21:37 Dewayne

I don't know.

00:21:40 Dewayne

I could try it, see what happens.

00:21:42 Joe

So something for the audience to try.

00:21:44 Joe

So maybe that's, uh, maybe that's an important tip just in case down the road.

00:21:49 Joe

So some of the again continuing some of these changes.

00:21:52 Dewayne

I I and no.

00:21:53 Dewayne

There's not, you cannot.

00:21:55 Dewayne

Yeah I said it.

00:21:56 Dewayne

I set it to two and you cannot lower it lower than two.

00:22:00 Dewayne

So it's almost like when you define a service.

00:22:03 Dewayne

You have to know in your mind is this a multi seat service or is this a solo service and you have to make that decision at its inception.

00:22:12 Joe

Right on the fly tips.

00:22:14 Dewayne

Yeah, thanks for that curveball.

00:22:18 Joe

So the.

00:22:20 Joe

Again, some of the some of the changes that have been happening we've gotten.

00:22:24 Joe

A number of new ones very recently and they are starting to roll out.

00:22:30 Joe

You can actually start to turn these on now.

00:22:33 Joe

There's a couple places in the interface you're going to find where you can start experiencing the the new bookings, so you're going to find like when you first log into this service there is a.

00:22:45 Joe

Little radio button.

00:22:46 Joe

I think in the upper right to turn that on to experience.

00:22:50 Joe

I would say that's more the administration side of bookings and some of the features that have changed there.

00:22:56 Joe

And if you dive in a little bit further into where you manage your bookings page, there's another checkbox that is more for the.

00:23:06 Joe

Customer facing interface.

00:23:07 Joe

The web page that they go to to do their bookings and there's a new version of.

00:23:12 Joe

I probably throwing out some fluent UI and some rounded boxes and things like that at you.

00:23:18 Joe

It definitely looks so a little little prettier.

00:23:21 Dewayne

Yeah, they did go a little Windows 11 on it I noticed so I guess sharp edges are not cool anymore.

00:23:30 Dewayne

Uh, yeah, the old interface.

00:23:33 Dewayne

I think in one of our original bookings trainings we instructed our users that.

00:23:39 Dewayne

It was more intuitive to go from the bottom up the way that the settings, the orientation of the settings, and the navigation bar was a little weird, and so we told.

00:23:48 Dewayne

People start at the bottom to find your business information 1st and then walk your way up the settings menu, which didn't make a lot of sense.

00:23:57 Dewayne

The the newer interfaces.

00:23:59 Dewayne

Is almost the same way, but it looks prettier so you know business information is at the bottom and staff and services are at the top so.

00:24:09 Dewayne

It's a little a little bit.

00:24:10 Dewayne

Different, but I do like the the newer page the the public facing page which I guess one thing that we should have said a little while ago was you have some options for your bookings page you can set it so that it requires an organizational login or you can let it be public and if it requires.

00:24:31 Dewayne

An organizational login.

00:24:32 Dewayne

It automatically captures the the person who's booking it, captures their email address and all that.

00:24:37 Dewayne

Stuff, so that's one less thing that you have to worry about.

00:24:40 Dewayne

So if it were a faculty member doing open office hours for students, you would probably be better off selecting that option to ensure that the I've had people typo their own email address before and notice it in the in the schedule and had to correct it.

00:24:57 Dewayne

On their behalf, so if you if you require that log and that becomes a non issue, it can't happen so.

00:25:05 Joe

I think the other important feature that they've been rolling out is new roles with respect to.

00:25:11 Joe

To your bookings calendars.

00:25:14 Joe

Uhm, you can do.

00:25:17 Joe

Obviously a full administrator.

00:25:19 Joe

Now again you can.

00:25:20 Joe

You can bring other people into these bookings calendars to help you manage them or bring other staff in to be participating in these services.

00:25:28 Joe

Is and they've expanded these roles now, so there's you know, uh, scheduled or role?

00:25:36 Joe

That's sort.

00:25:37 Joe

I feel like again, like I said, this is sort of like a calendar proxy.

00:25:40 Joe

Some of these roles feel like you were used to with flying exchange and exchange mailbox, where you've given, you know, an assistant.

00:25:49 Joe

Or another team member roles to manage a exchange resource mailbox and you know who can.

00:25:58 Joe

Who can book who can approve.

00:26:00 Joe

Who can view open slots so they have new roles around team members and scheduler viewer guest administrator levels that you can now take advantage of, and you may be someone who has a bookings calendar.

00:26:19 Joe

You may never actually even have to go into bookings.

00:26:21 Joe

And manage anything in there someone else may be able to just completely take care of it and all you see are events showing up on your calendar.

00:26:31 Dewayne

Yeah, not every staff needs to.

00:26:34 Dewayne

And when I say staff, I mean somebody who's been defined inside of bookings.

00:26:38 Dewayne

Not every staff needs to have the ability to go in and manage the bookings page.

00:26:42 Dewayne

Like you're saying you may.

00:26:43 Dewayne

You may never look at it but but one thing that bookings does that I've found is useful to open up is that.

00:26:51 Dewayne

Viewer role if you have multiple staff in defined in your bookings page and you look at the calendar you get this nice consolidated calendar that shows everything that's happening.

00:27:04 Dewayne

From that you know top down view as if that were a business and so you can give somebody a viewer role so they can go in and look and see that view of that calendar.

00:27:14 Dewayne

And it almost looks like a SharePoint calendar kind of merged with a a calendar that came out of planner.

00:27:20 Dewayne

You know, I don't.

00:27:20 Dewayne

I don't really know what it is, but it is nice to be able to see that.

00:27:24 Dewayne

View of everything all at the same.

00:27:25 Dewayne

Time, and I think that's a pretty valuable thing to be able to do, and I don't know when these roles.

00:27:30 Dewayne

Came out, we just kind of noticed them.

00:27:32 Dewayne

I don't know.

00:27:33 Dewayne

A couple weeks ago when we were playing around with this, this is fairly new.

00:27:36 Dewayne

But I find it.

00:27:37 Dewayne

Very useful.

00:27:37 Joe

Yeah, this is.

00:27:38 Joe

Yeah, this is part of the the new the new bookings rollout of of these is.

00:27:43 Joe

Yeah definitely definitely very new.

00:27:45 Joe

They've also added a feature where you can clone a bookings calendar, so you could go set up a calendar.

00:27:55 Joe

Configure it as basically a template.

00:27:58 Joe

If you were wanting to roll.

00:28:00 Joe

Roll these out for other individuals.

00:28:02 Joe

So like we were talking about maybe maybe get the basis of of an office hours template set up.

00:28:11 Joe

And faculty could use that as a as a way to initiate their first creation of a bookings calendar for them.

00:28:20 Joe

There's also something that.

00:28:23 Joe

We've taken advantage of and it's it's kind of iffy what that means right now, but there's the ability to enable SMS notifications.

00:28:33 Joe

It's a little vague.

00:28:34 Joe

There is a in the settings interface.

00:28:37 Joe

There's a checkbox for this to enable SMS notifications, but it's a little vague it it?

00:28:42 Joe

I wouldn't say vague really though it's more like yeah.

00:28:45 Joe

This may change.

00:28:46 Joe

This may be deleted.

00:28:48 Joe

This may be removed.

00:28:49 Joe

Don't expect this to be exactly the way it is.

00:28:54 Joe

I think they were pretty clear about that, but vague as far as what might change, but we do now see in finally in the road map in office Microsoft 365 road map that is officially getting listed now as part of the booking service. No real clear indication if this is going to cost anything.

00:29:14 Joe

Or maybe if there is a.

00:29:16 Joe

Set number that you get per month per user of SMS notification.

00:29:20 Joe

Or not.

00:29:22 Joe

But at least we know it's going to stay around if that's something you've been taken advantage of.

00:29:28 Dewayne

Yeah, I mean it says flat out this features in preview, which you know, as it nerds we know.

00:29:34 Dewayne

OK, tread lightly here is this could be anything but I think it said it's been in preview since I've started using booking so it's Forever preview.

00:29:47

But I think.

00:29:48 Dewayne

This is a really cool thing because this gives you one extra method of engagement with your with your customers, and I'm going to go on a on a little side rant here.

00:29:58 Dewayne

Or side tangent.

00:29:59 Dewayne

Joe and I work for a land grant university and land grant.

00:30:02 Dewayne

Universities have a program called extension.

00:30:05 Dewayne

An extension is a service.

00:30:08 Dewayne

That we offer to every single person that lives in the state of Florida, and so our mission.

00:30:13 Dewayne

Part of our mission and extension, is to bring the research that our university learns and generates the knowledge that we create and best practices and all those things to every person who lives in the state of Florida.

00:30:27 Dewayne

And so I think even something simple like this checkbox is so useful because that's our mission is to engage people more morpnic, efficient efficiently.

00:30:38 Dewayne

I guess I should say.

00:30:39 Dewayne

And so this tool I just see this tool being so incredibly useful specifically in extension.

00:30:47 Dewayne

Because we have nutrition specialists and people who can, you know, I know I've said this before.

00:30:53 Dewayne

People who can help you learn how to do your taxes and and manage your farmland and and rehabilitate a landscape and all these things.

00:31:01 Dewayne

And all of our agents offer services.

00:31:04 Dewayne

And those services you know, like bookings is not just an online thing.

00:31:09 Dewayne

Like if you have a workshop or you want somebody to schedule you and punch in their address of where they want you to meet them, you can do all of that with this product.

00:31:17 Dewayne

And even you know, I know that little checkbox about texting kind of set me off, but I just got me.

00:31:22 Dewayne

Excited about that's.

00:31:24 Dewayne

Our whole goal.

00:31:25 Dewayne

Is to make sure that we engage people.

00:31:29 Dewayne

More efficiently and give them, you know, I always like to say make the technology work for us.

00:31:34 Dewayne

You know, give these tools to our agents and see what they can do with it.

00:31:37 Dewayne

And I I just feel like this is a super useful thing.

00:31:41 Joe

And that's an important part of those. Those notifications you can get, which is important for something where, like you said, an extension agent might be going out to someone's farm to help them do some soil samples.

00:31:56 Joe

And you can set up your bookings to do notifications a week out a day before an hour before you can.

00:32:05 Joe

You can have all of those notifications available, and adding the text messaging I think is an important little feature that helps your customers.

00:32:15 Joe

Make sure that everybody is at the right place at the right time.

00:32:20 Dewayne

Before we get into a crazy scenario that we've been experimenting with, I did want to point out that there is no payment collection type mechanism in this like you can define a service as having a cost associated with it.

00:32:37 Dewayne

Again, think of this through the lens of a small business, so you could say.

00:32:41 Dewayne

You can come do XYZ kind of appointment with me and it costs \$50.00 an.

00:32:45 Dewayne

Hour or whatever.

00:32:46 Dewayne

So there is a way that you can define what it would cost, but there is no collection, so just keep that in mind.

00:32:53 Dewayne

If if if you.

00:32:54 Dewayne

Or brainstorming or thinking about this.

00:32:56 Dewayne

You will need to have some sort of payment type type mechanism.

00:33:01 Joe

It's interesting, again, going back to the history of bookings 'cause there used to be a service that you could do that in Microsoft that that they did remove.

00:33:11 Joe

What was that invoice? Invoicing?

00:33:13 Dewayne

Yep, Yep, Microsoft invoice.

00:33:14 Speaker 1

Yeah so.

00:33:15 Dewayne

It was a small business tool.

00:33:18 Dewayne

Used it myself, thought it was really great till they yanked it.

00:33:24 Dewayne

Yeah, oops.

00:33:26 Joe

So so yeah, talk about talk about this other kind of advanced scenario that.

00:33:34 Joe

You were going to mention, I know that we've had over the years a number of.

00:33:41 Joe

Ways to do this?

00:33:42 Joe

I won't say struggles, just maybe this because there's so many ways to do something like this where someone struggles yet somebody somebody wants to book and set up the ability to book a conference room.

00:33:47 Dewayne

Now we call this troubles.

00:33:56 Joe

Or book a greenhouse or book a laptop and projector.

00:34:02 Joe

Or book a vehicle.

00:34:04 Joe

We've done that through SharePoint calendars.

00:34:09 Joe

We've done those through exchange mailbox resources.

00:34:14 Joe

And and they all have their kind of pros and cons.

00:34:18 Joe

Uhm, and you went through a scenario and went through the process of trying this in bookings.

00:34:25 Dewayne

Yeah, we we kind of got inspired by a blog that we'll leave in the show notes, but it was talking about booking workspaces.

00:34:36 Dewayne

And we started thinking about it and we're like, yeah, bookings is like it, books things right?

00:34:41 Dewayne

So why does it have to book humans?

00:34:42 Dewayne

Why can't it book objects and so?

00:34:45 Dewayne

We went through this blog and kind of brainstormed around it a little bit and we've got a proof of concept going that we're going to try to launch it at one of our offices.

00:34:53 Dewayne

But they had requested like 20 resource calendars and I just was thinking about the the process of trying to manage those like the poor person who has those in their outlook.

00:35:06 Speaker 1

You know?

00:35:07 Dewayne

It just seemed.

00:35:08 Dewayne

Very overwhelming and so why not try to put these at booking?

00:35:13 Dewayne

So we went ahead and generated.

00:35:14 Dewayne

All the resource calendars or you know resource mailboxes.

00:35:18 Dewayne

But then we added them as staff members to a bookings page.

00:35:25 Dewayne

So the Ford F-150 is a staff member, you know. And so then we made specific services that we felt like would kind of encompass.

00:35:36 Dewayne

You know as many scenarios as we could think of, so we had a one hour booking a 2 hour booking a half a day and a whole day.

00:35:44 Dewayne

And you could reserve a vehicle or a room, and because there's staff members, you have to select that option that says let the customer select specific staff.

00:35:55 Dewayne

And so when you select.

00:35:57 Dewayne

You're meeting your two hour meeting.

00:35:59 Dewayne

You get a dropdown and you can select whichever room it is that you want to use.

00:36:04 Dewayne

And so now you've got this utility that automatically handles scheduling automatically, handles conflict.

00:36:11 Dewayne

In fact conflict is impossible because you can't even book the thing if it's not available.

00:36:16 Dewayne

It automatically handles reminders.

00:36:19 Dewayne

It automatically lets the customer manage their own appointment.

00:36:23 Dewayne

So if I booked that room for, you know next Wednesday and all of a sudden now I don't need it, I can just go to the email that booking sent me and I can cancel it and then free that slot.

00:36:34 Dewayne

Allows administration, you know, a top down view that calendar I was referring to before where they can see everything at like a high level.

00:36:42 Dewayne

They can.

00:36:43 Dewayne

They can get that information out of this it's.

00:36:47 Dewayne

Very very cool.

00:36:48 Dewayne

I'm really excited to try this.

00:36:49 Dewayne

I I think it's going to be a lot of fun.

00:36:52 Dewayne

Definitely had some quirks like you can't.

00:36:55 Dewayne

You can't sort the staff into a specific order, it just kind of randomly throws them into a list.

00:37:02 Dewayne

So like I couldn't group vehicles and rooms together, which I found a little frustrating, but I think if we can get over that, I think the advantages of this will far outweigh the fact that I can't have, you know, perfect ordering of staff members.

00:37:16 Joe

I think the two, the two features that I'm interested in and really like about this concept, is it still enables someone who has been used to using.

00:37:31 Joe

Outlook to add a room to a meeting.

00:37:36 Joe

They can still do that, it will.

00:37:39 Joe

You're still going to get conflict resolution that way.

00:37:42 Joe

They're still going to be able to see times that are open for those rooms or vehicles and book it that way, and bookings will of course look at that calendar and can pick it up if someone has put something on that calendar but didn't do it through bookings.

00:37:58 Joe

So if you've got someone.

00:37:59 Joe

Who's used to doing it that way?

00:38:00 Joe

They don't have to switch over necessarily and use bookings and the other feature.

00:38:05 Joe

You kind of mentioned that I like about bookings is.

00:38:08 Joe

Like you said, if you've got someone who's trying to manage, in this case 20 different resource calendars.

00:38:16 Joe

That's not a great.

00:38:17 Joe

You know.

00:38:18 Joe

It's not a great way to do that in Outlook.

00:38:21 Joe

That's a lot of a lot of moving pieces in there, and a lot of extra mailboxes you know tossed into into your outlook where in bookings.

00:38:32 Joe

You can get this role added and you could go in through bookings and you have sort of 1 interface to a bunch of other calendars.

00:38:39 Joe

One place to go to view these and manage these.

00:38:43 Joe

UM, I like that kind of concept too.

00:38:46 Joe

With this hopefully successful method of using.

00:38:51 Joe

Using bookings.

00:38:53 Dewayne

You're right, it is super flexible and I feel like exactly what you said will make this.

00:39:00 Dewayne

Theoretically, very successful is even if you have a few people who would rather just use outlook to schedule an appointment with a room, they can still do that.

00:39:11 Dewayne

But these other folks you know, like we like to use tabs a lot in teams.

00:39:16 Dewayne

And so you know this department in the general channel for their departmental team.

00:39:21 Dewayne

This bookings page becomes a.

00:39:23 Dewayne

Tab and now you have this workflow and it's easy for people to find it.

00:39:27 Dewayne

They just open up teams, hit the bookings tab, make their appointment and now they have the van for the afternoon.

00:39:33 Dewayne

You know, so I think that's I think there's a lot of advantages you know.

00:39:38 Dewayne

Like I said, I think the the pros of this outweigh the cons and and change is difficult and this is new and you know anytime you have a a process change.

00:39:47 Dewayne

You have to kind of show people why this is better and that's one of our foundational things that we always do.

00:39:53 Dewayne

We even have an episode on why why matters, so we will try to try to, you know, present this in a way that we show them why it's easier, why it's better, why it's more efficient.

00:40:06 Dewayne

Why it makes their life better in some way, so I'm looking forward to trying it.

00:40:11 Joe

One on one other tip.

00:40:13 Joe

Wanted to mention was the how do you. How do you access bookings we mentioned it's you know you can go to office.com and get in there. That's the the web interface and and that's.

00:40:24 Joe

Probably the best way to initially set up your service is you want to do it through the web interface.

00:40:31 Joe

You can bring in bookings into teams, but there's portions of that that aren't accessible to you.

00:40:39 Joe

There's certain features and settings that you can't change through through the teams.

00:40:45 Joe

Interface so jump out to the web interface if you're going to want to do any.

00:40:49 Joe

Things specific.

00:40:51 Joe

When you're initially setting this up, or maybe you know after you've set it up, you want to make some major changes certainly usable once you have it set up inside of the teams.

00:41:01 Joe

And there's also, uh, a mobile app for this, so there's a, uh, bookings mobile app that you can install.

00:41:07 Joe

It was, I think, the last updates July or so, so it's still an active tool.

00:41:13 Dewayne

Awesome, more ways to get your work done that's better.

00:41:18 Dewayne

Cool, well this was.

00:41:19 Dewayne

I mean, this was fun.

00:41:20 Dewayne

You know, I know we can talk about just about anything forever, but.

00:41:25 Dewayne

Bookings I really enjoy it.

00:41:27 Dewayne

I feel like just the just sheer practicality of it makes it something worth looking at and the fact that you know we've we've had shadow services pop up where people are trying to do something like this and we introduce them to bookings and they're just like, whoa, I had no idea that we could do this, you know, and so I feel like.

00:41:45 Dewayne

Sharing the word about this and other other organizations out there who may already have access to this, but not really realize why it's there or what it does.

00:41:53 Dewayne

You should definitely look into it 'cause.

00:41:55 Dewayne

Like I said, every single time Joe or I send an email, we're using bookings 'cause there's a link right in our email signature that anybody can click on and book a meeting with us and that makes our time more efficient, makes us more efficient and it's just easy and fun so.

00:42:12 Joe

What's it up?

00:42:13 Joe

Book him dannno.

00:42:17 Dewayne

On that note.

00:42:20 Dewayne

You got any wins man.

00:42:21 Dewayne

I mean we've had a busy month, but I think we both had some some successes.

00:42:26 Joe

Yeah, I I snuck one in.

00:42:29 Joe

It's it's it's it's.

00:42:33 Joe

But kind of person.

00:42:34 Joe

I I was attending a PowerShell user group.

00:42:39 Joe

Their research triangle does a has a great PowerShell on online now I think they've gone back to meeting in person, but I'm not going to drive up to up to the research triangle up to the Carolinas.

00:42:54 Joe

But one of their last sessions they were chatting at the end about one of the participants was writing some PowerShell code on producing passwords and just creating some random randomized passwords right in some PowerShell code.

00:43:09 Joe

That, and I remembered that I had started to work on a project just for the fun of it on doing something similar and I went back and found my code and it was.

00:43:21 Joe

It was at least like 6 years old and I had never finished it.

00:43:24 Joe

It was early.

00:43:26 Joe

Stages of learning PowerShell doing full on commandlets and and functions.

00:43:35 Joe

And, well, I spent a number of years doing PowerShell now and I went back and.

00:43:40 Joe

And fixed it up a bit.

00:43:42 Joe

Spent about a couple hours on it and got it working.

00:43:46 Joe

But it was. It was sort of a unique way of creating passwords. There's a. There's a way of creating passwords called dice passwords, and it's basically a list of 7000 plus words that are matched up with a 5 digit number and that number. Each digit is one through 6.

00:44:06 Joe

And the concept is your rule.

00:44:08 Joe

You roll some dice to get this 5 digit number and that matches up with a word and you.

00:44:14 Joe

You do that a number of times until you get a number of random random words and you create a phrase.

00:44:20 Joe

And so there's word lists on the Internet, so I was pulling down a word list on the Internet, parsing it, and making it available to randomly grab words out of that.

00:44:35 Joe

And I took it a little bit further, 'cause they were also showing how they were trying to make a bunch of passwords at one at. You know, at a time you know here it spit out 100 passwords at once.

00:44:46 Joe

And I took the the new for each object.

00:44:51 Joe

The ability to do parallelism in in PowerShell core and updated it a little bit further to enable that feature.

00:44:59 Joe

So that was just a little fun side project.

00:45:02 Joe

I really probably don't need it for anything, but it does something.

00:45:05 Joe

I never finished way back when and now have the skills and spends a little time to do that and it was kind of fun.

00:45:16 Dewayne

All of a sudden my win feels so lame.

00:45:22 Dewayne

Not nearly that nerdy.

00:45:24 Joe

It's only like 20 lines of code that seriously, it's really.

00:45:27 Joe

It's not, it's just a.

00:45:31 Dewayne

Yeah, so mines mines not a technical win at all.

00:45:31 Joe

I'm smarter now, so I'm smart.

00:45:36 Dewayne

It's a it was.

00:45:38 Dewayne

A personal thing and it was very frustrating.

00:45:40 Dewayne

Variance that it's finally over.

00:45:42 Dewayne

But I, uh, I had, uh, some car trouble with a car and I had to go through the entire process of a lemon law, and I had never done that before.

00:45:54 Dewayne

And that was.

00:45:55 Dewayne

Nerve wracking and frustrating and you know my car was gone for a really long time.

00:46:01 Dewayne

And that was annoying.

00:46:02 Dewayne

And it's finally over and I feel like I survived this like gauntlet of auto industry and right now as a is.

00:46:11 Dewayne

It's really a terrible time to be trying to deal with getting a new car, and but I made it.

00:46:17 Dewayne

I made it through that, finally got that sorted out and that was, you know, I mainly my win is I I survived, I didn't lose my mind I think.

00:46:27 Joe

So you're back.

00:46:28 Joe

You have to go back to two.

00:46:29 Joe

Cars that are both working.

00:46:32 Dewayne

Yeah, it's.

00:46:32 Joe

One isn't going to, 1 isn't going to catch fire.

00:46:36 Dewayne

Yeah, the old one had a habit of spontaneously exploding and it was an EV so they would they would blow up in your garage.

00:46:43 Dewayne

So yeah, that was great.

00:46:46 Dewayne

But it kind of inspired me to do some work on the other car, 'cause now I was like, huh?

00:46:51 Dewayne

I'm in car mode and I want to get things done and and do some stuff and and so I the headlights were a little foggy.

00:46:57 Dewayne

So I went through that whole process of of polishing the headlights and and I'm sore from it so, but they're super clear now.

00:47:06 Dewayne

I wet sanded, you know, the living daylights out of these things and then tried to go the extra mile and and wrapped them in a 3M film which I have never done before. And that is a.

00:47:19 Dewayne

Infuriating process if you're not good at it, so I have a feeling I'll probably be redoing them soon, 'cause it's probably going to come off, but hopefully it'll keep them clear for a long time now 'cause I've done it before.

00:47:33 Dewayne

Tried the chemical sealant stuff, it didn't last and and yeah, hopefully this is like it.

00:47:40 Dewayne

So, so I felt good about it.

00:47:42 Dewayne

You know, I survived the car gauntlet and made my headlight shiny.

00:47:47 Dewayne

I didn't do anything cool with dice passwords and lists and commandlets and stuff like that.

00:47:51 Dewayne

So I feel bad.

00:47:53 Joe

Well, I'm I'm I'm excited to get a ride in ride in the new vehicle eventually someday and.

00:47:58 Joe

So it's got like 12 cameras, DVD players and.

00:48:03 Dewayne

So my kids love it.

00:48:04 Dewayne

That's what matters.

00:48:06 Dewayne

They didn't believe me, but when I said we were looking at cars, every car we looked at was OK.

00:48:10 Dewayne

How will the kids feel sitting in the back?

00:48:14 Dewayne

They were the deciding factor.

00:48:16 Dewayne

Even whether they knew it or not.

00:48:17 Dewayne

So yeah, they'll be happy, but well, this was fun.

00:48:22 Dewayne

This was a good a good chat about bookings again.

00:48:26 Dewayne

I just it's just useful that's that's the most important thing I can say about it.

00:48:31 Dewayne

Is this just useful?

00:48:33 Dewayne

And I feel like everybody should try.

00:48:35 Dewayne

It out so.

00:48:36 Joe

Well another good episode.

00:48:39 Dewayne

Yeah, next month special.

00:48:41 Dewayne

It'll be our one year anniversary, Joe.

00:48:43 Dewayne

Gotta do something big.

00:48:44 Joe

I know that's that's great.

00:48:45 Dewayne

Start planning.

00:48:46 Joe

Number 12.

00:48:48 Dewayne

All right, well thank you everybody for listening to us blab about bookings.

00:48:51 Dewayne

We hope that we've inspired you to check it out if you aren't already using it, so we will see you next month.

00:49:02 Dewayne

We hope you enjoyed this episode of The Shift Show.

00:49:05 Dewayne

If you found our content useful, please consider subscribing and leaving us a five star review.

00:49:10 Dewayne

This will help others find our show. If you'd like to connect with us, you can find us on LinkedIn or on our home page at a KMY forward slash shift show. We'll be back.

00:49:22 Dewayne

Next month for a new episode.

00:49:25 Scotty

Transporter room standby to beam up landing party.