

Attaching Attendees to a Portal Request

Once you see that you have a request you will want to “Approve” the request:

Portal Requests > Portal Request: SO0004

PORTAL REQUEST: SO0004

Accept Decline Cancel Reassign

Details Additional Information Workflow

General Information

Scheduling Data Set: SO - Events
ID: SO0004
Booking Type: SO Room Request
Description: Other

Requestor: Bob Burnquist
Status: New Request
Number of Attendees: 10

Time Preferences

Start Date: Wednesday, October 21, 2020
End Date: Wednesday, October 21, 2020
Start Time: 7:00 PM
End Time: 7:30 PM
Duration: 00:30
Note: <not specified>

Room Request

Selected Room

Campus: NPS
Building: Glasgow Hall
Room: Glasgow Hall 110
Room Configuration: Default (COVID)

Room Request Criteria

Campus: NPS
Building: Glasgow Hall

Room Types: <not specified>
Floor Levels: <not specified>
Pavilions: <not specified>

Characteristics: <not specified>
Configuration Types: <not specified>
Minimum Capacity: 0
Minimum Area: 0

Note: <not specified>

Once approved you will see a different view:

Portal Requests > Portal Request: SO0004 > New Reservation

NEW RESERVATION

Details Attendees (0) Services (0) Cost Tracking Workflow (0) Reminders (0) Portal Settings Attachments (0) Note Additional Information

Approve Save

Classification

Scheduling Data Set: Events
Event: Portal Room Requests
Activity: 01

General Information

Status: Pending
Managed By: Jennifer Barnhill
Reservation Type: Meeting
Requestor's Unit: XXX
ID: SO0004
Requestor Contact: Bob Burnquist
Reference Number:
Number of Attendees: 10
Description: Other
Website URL:

Time and Room Information

Start Date: 2020/10/21
Start Time: 7:00 PM
End Time: 7:30 PM
Duration: 00:30
Setup: 00:00
Teardown: 00:00

Rooms (1) Room Request Criteria (1)

Status	Room	Room Type - ID	Room Configuration - Capacity
<input type="checkbox"/>	Glasgow Hall 110	Classroom	11

Room Setup Instructions and Notes:

You will notice that there are no attendees when the user makes their initial request. This is something that administrators will have to add onto the booking.

Portal Requests > Portal Request: SO0004 > New Reservation

Reservations Search...

NEW RESERVATION

Details Attendees (0) Services (0) Cost Tracking Workflow (0) Reminders (0) Portal Settings Attachments (0) Note **Additional Information** ⚙️

Additional Information

What is the purpose of your request:
Other

Please provide additional details to help the Scheduler process your request:
TEST

I agree to follow campus COVID-19 protocols (cleaning the room after use, etc.):
Agreed

List the names of everyone who will be in attendance to adhere to campus COVID tracing regulations. Failure to list names will result in a denied request.:
TEST

You can find this information in the Additional Information Field.

With this list in hand you can move over to the Attendees section.

Click on the icon that looks like a link to attach attendees.

Portal Requests > Portal Request: SO0004 > New Reservation

Reservations Search...

NEW RESERVATION

Approve Save

Details Attendees (0) Services (0) Cost Tracking Workflow (0) Reminders (0) Portal Settings Attachments (0) Note Additional Information ⚙️

⚙️ ⌂ ⚙️

1 / 1

Show: 30 Search:

Contact ID	Display As	E-mail	Unit - ID
Please use the Attach icon to attach records.			
No records			

Once the Attach screen appears you can search for the name of the attendee.

Portal Requests > Portal Request: SO0004 > New Reservation

Reservations Search...

NEW RESERVATION

Approve Save

Details Attendees (0) Services (0) Cost Tracking Workflow (0) Reminders (0) Portal Settings Attachments (0) Note Additional Information ⚙️

⚙️ ⌂ ⚙️

1 / 1

Show: 15 Search:

Address Book: Ancillary Organizational Unit: All

Attach

Contact ID	Display As	E-mail	Unit - ID
The list cannot be displayed because the number of records matching the search criteria exceeds the maximum number of records that can be displayed (10000). Please use the search box to reduce the number of matching records to display.			
No records			

Select the name of the first attendee and click "Select and Close"

Attach

Address Book: Ancillary Organizational Unit: All

Contacts

1 / 1 Show: 15 Search: barnhill

Contact ID	Display As	E-mail	Unit - ID
<input type="checkbox"/> Admin Test	Admin Test	jennifer.barnhill@nps.edu	XXX
<input type="checkbox"/> Bob	Bob Burnquist	jennifer.barnhill@nps.edu	XXX
<input type="checkbox"/> david.barnhill	David Barnhill	david.barnhill@nps.edu	Students
<input checked="" type="checkbox"/> jennifer.barnhill	Jennifer Barnhill	jennifer.barnhill@nps.edu	Employees

4 / 32 records (1 selected)

Select and Close

Repeat for each attendee.

Portal Requests > Portal Request: SO0004 > New Reservation

Reservations Search...

NEW RESERVATION Approve

Details Attendees (1) Services (0) Cost Tracking Workflow (0) Reminders (0) Portal Settings Attachments (0) Note Additional Information

1 / 1 Show: 30 Search:

Contact ID	Display As	E-mail	Unit - ID
<input type="checkbox"/> jennifer.barnhill	Jennifer Barnhill	jennifer.barnhill@nps.edu	Employees

Your attendee will now appear on the booking and will appear in COVID tracing reports.

You can now return to the main screen to complete your approval.