Community User Quick Start Guide

Hi community member, and welcome to ML Schedules™ K12 Facility Request Software. You'll find the software easy to use with online instructions and a Help site that guides you through the process of setting up an account and requesting spaces at your school district.

For those users who want additional guidance, this *Quick Start Guide* provides a brief overview of the request process as well as step-by-step instructions for account setup and requesting spaces by various parameters.

We're sure you'll find ML Schedules™ Software both easy to use and beneficial in terms of saving time and energy…not to mention reducing your school district's carbon footprint.

MasterLibrary™
Construction and Facilities Software

Contents

ML Schedules™ Software Commonly Used Icons

Add/Create *new item (e.g., add Group)*

Edit *an existing item (e.g., a User or Group profile)*

Help *to open the online Help website*

Cancel *procedure or delete selected item*

ML Schedules™ Software Commonly Used Buttons

View

View *to search for spaces that match entered criteria*

Request Space

Request Space *to submit a completed Request form for approval by the district*

Continue

Continue *to select available spaces during a Recurring or Multiple Spaces at the Same Time requests*

Add New Group

Add New Group *in the User Profile page*

How the software works 3
- People in the process 4
- Supporting media 5

First-time overview. 6

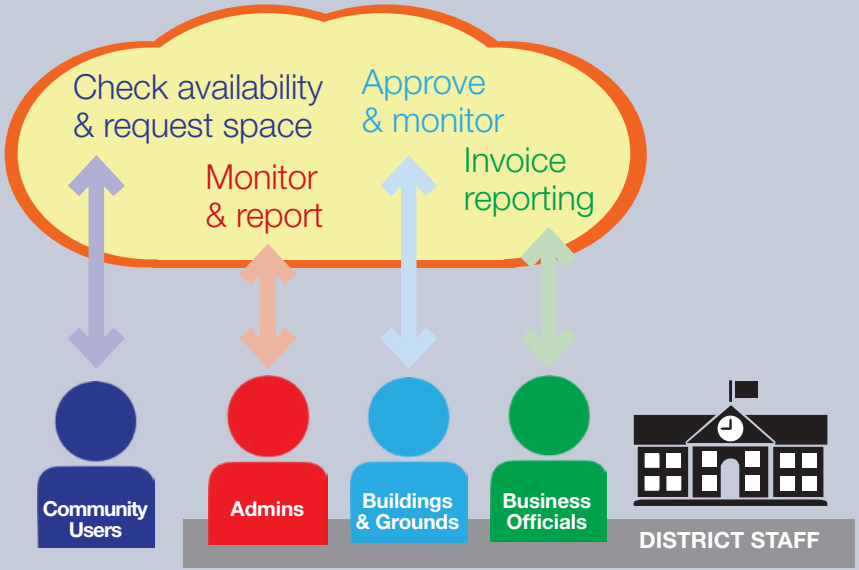
1. Register new account 7
2. Log in 10
   - Add Group Insurance Information 11
3. Submit Facility Requests 13
   - Request a Specific Date and Time 14
   - Facility Use Request form sections and fields. . . 16
   - Request a Specific Space 23
   - Make a Recurring Request (in the same or different Spaces) 25
   - Request Multiple Spaces at Once 30

Edit a User Profile and Add Groups 34

Edit a Group Profile 35

Other Resources 36

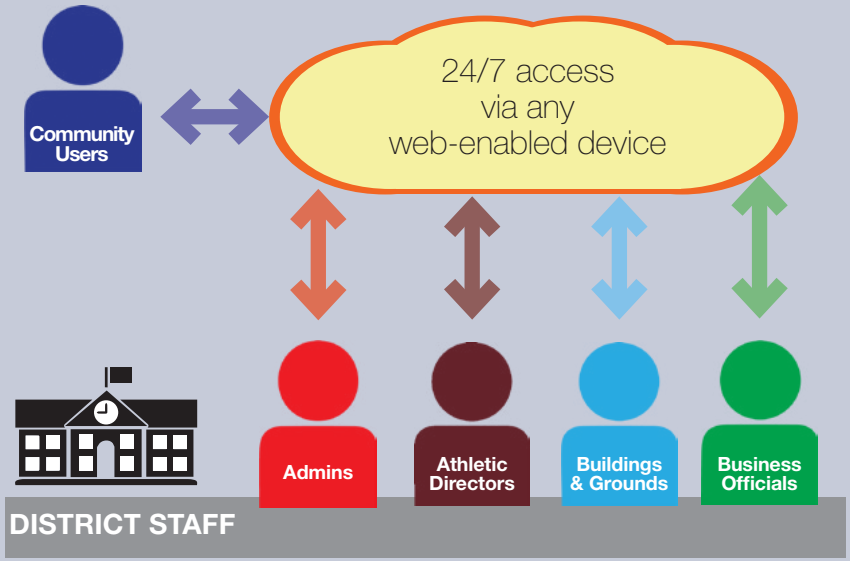
How the software works



ML Schedules™ software moves the process you use to request facility space from your school district's office to **"the cloud"** which brings many benefits to you:

- **Saves time** with ability to search and request available District spaces 24/7 via a secure website.
- **Reduces approval times** based on automated email notifications to appropriate District officials.
- **Saves money** with reduced need for phone calls, hard copies, postage costs, and trips to District offices.
- **Reduces environmental impact** by eliminating the need for paper copies.

People in the process



ML Schedules™ Software puts everyone involved with district Facility Use Requests on the same page including:

1. **Community users** like you.
2. **School administrators** responsible for managing the Facility Use Request process.
3. **Athletic Directors** and their staff responsible for managing Facility Requests for athletic fields and spaces.
4. **School Buildings and Grounds staff** responsible for the maintenance of District spaces
5. **School Business Officials** who need to approve all Facility Use Requests and who also manage invoices and payments for approved events.

Everyone involved in the process has instant access to real-time data via any web-connected device such as a home computer, tablet or smartphone.

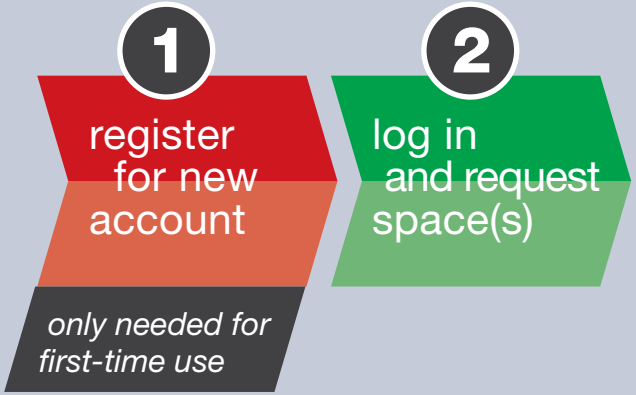
Supporting Media

A wide variety of media is usually used by a District to process Community Facility Use Requests including:

- **Printed forms** such as a Facility Use Request
- **Spreadsheets** to track spaces
- **Phone calls** when requested spaces are not available
- **Emails** as another means of communication
- **Ledgers** to enter invoices and payments received
- **Log books** to track spaces
- **Snail mail** to send forms and invoices
- **Signatures** of Business Officials

ML Schedules™ Software consolidates data into one secure place—the cloud.

First-Time Overview



The first time you use ML Schedules™ software, you will need to register for a new User account with a Group Name (e.g., for a youth sports team or Girl Scout troop).

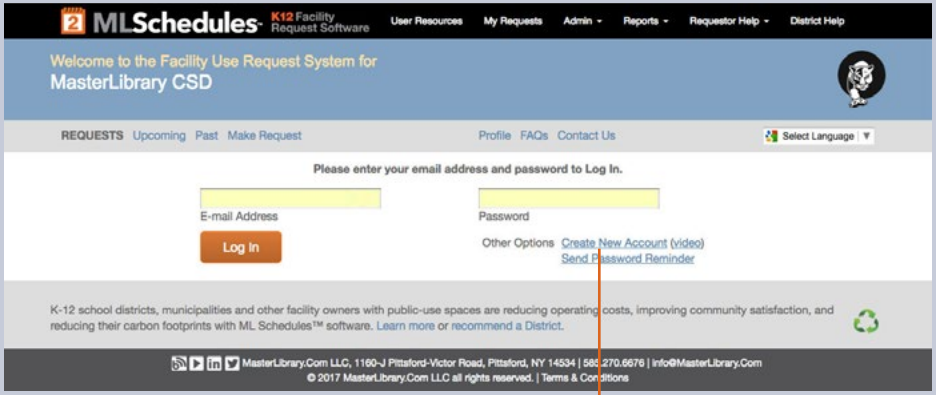
You can also create multiple Group Names under one user account. Adding New Groups is described in the Log In procedure

This Account set step is only necessary the first time you use the software. After that, all you'll need to do is log into your district's ML Schedules™ software account using your e-mail address and password to search for and submit requests for a desired space(s).

Many districts require external (community) Group Managers to upload the Group's insurance certificate (in PDF or JPG format) and enter the insurance expiration date the first time you log into the system as described on page 11 of this Guide.

1. Register new account

ML Schedules™ Software sample school district login page



Create New Account

Access ML Schedules™ Software from your school district's website

From any web browser connected to the internet:

1. Access the ML Schedules™ software login screen using your district-specific URL.

Note: The format of the district-specific URL is a two character State Abbreviation followed by a number-dot-mlschedules.com. For example screen: http://www.ny9.mlschedules.com.

An ML Schedules™ Software login screen similar to the one shown at left will be displayed.

2. Select the **Create New Account** command.

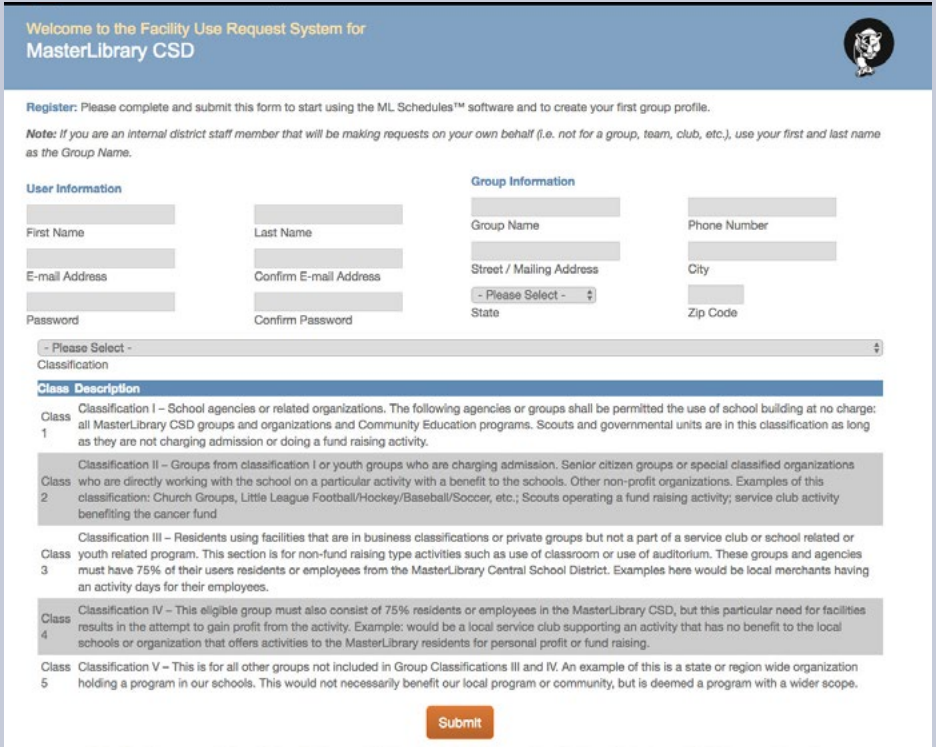
A Register screen will be displayed (see next page) to enter information about yourself and your Group(s).

Note: Once your account is set up, you may want to bookmark the URL for your district's log-in page.

(continued on next page)

1. Register new account (cont.)

ML Schedules™ Register screen



Enter User and Group information

From the Register screen:

3. Enter all of the requested data including:

User Information

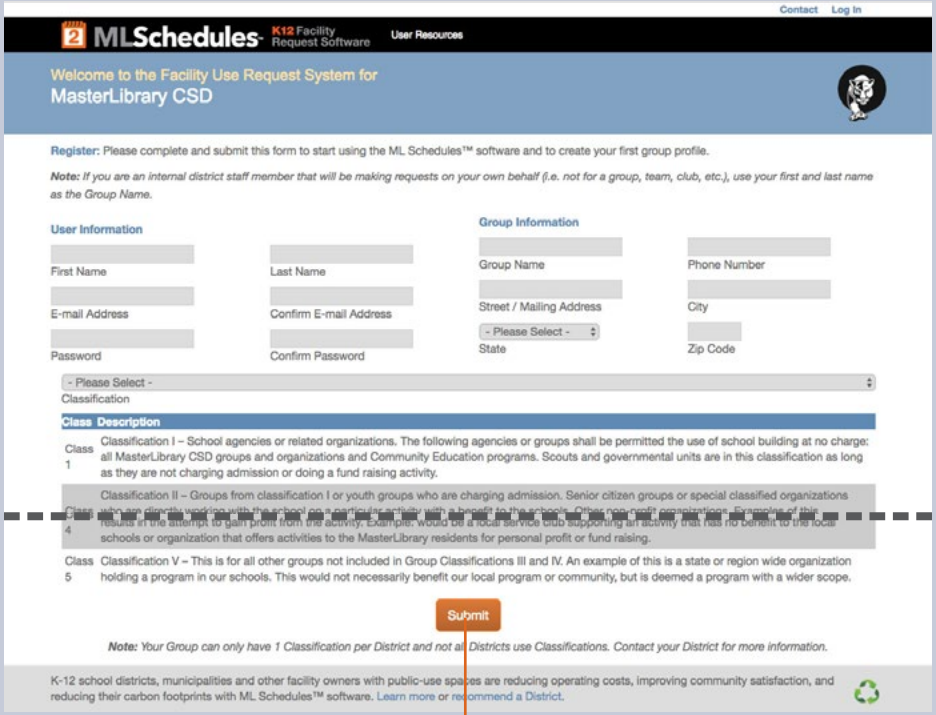
- First and Last Name
- Email address including confirmation
- Password with confirmation

Group Information

- Your Group's Name
- A phone number with Area Code in specified format
- Street mailing address including ZIP Code
- Requested Group Classification (e.g., 5 for external for-profit non-school groups)

(continued on next page)

ML Schedules™ Register screen



Submit button

Enter User and Group information (cont.)

When all the data is entered:

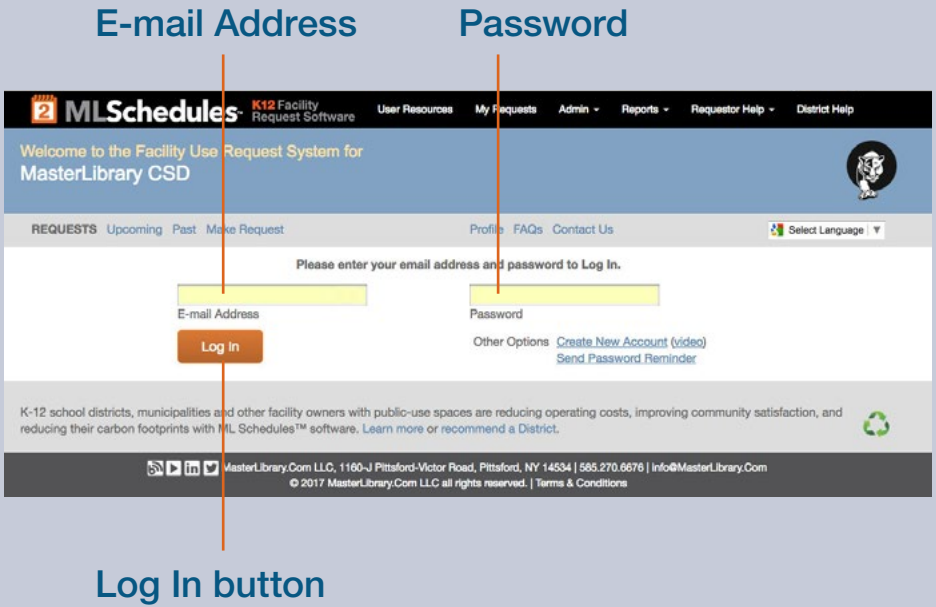
4. Select the **Submit** button at the bottom of the screen

An email message confirming your registration will be sent to you. Please keep this message for your records.

Note: Many districts require external (community) Group Managers to upload the Group's insurance certificate (in PDF or JPG format) and enter the insurance expiration date the first time you log into the system as described on page 11 of this Guide.

2. Log in

ML Schedules™ Software sample school district login page



Log into ML Schedules™ Software

You can now start making space reservations using the software. If you are not already in the software:

1. Access the ML Schedules™ software login screen using your district-specific URL. (See page 7 for an example of the URL format.)
2. Enter your **E-mail Address** and **Password.**
3. Select **Log In** button.

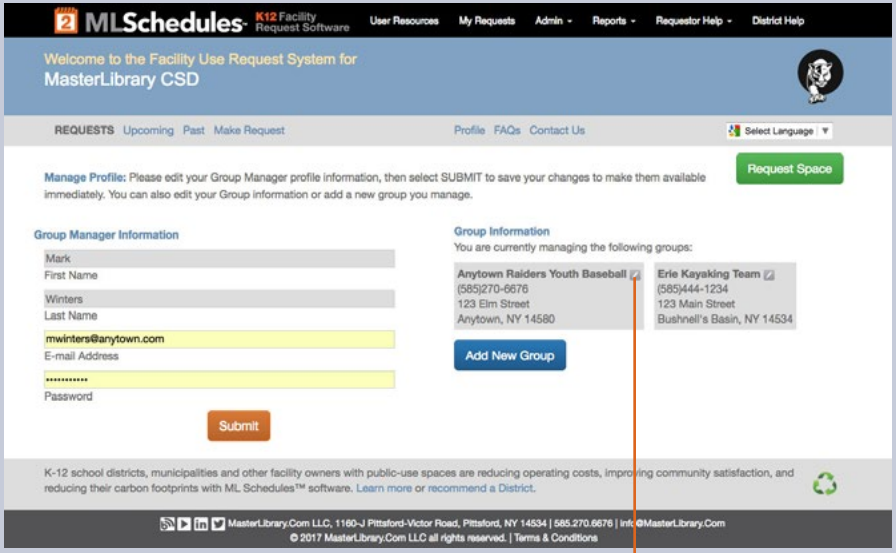
The *Select Reservation Type* screen will be displayed (see next page) where you can start the process of submitting a Facility Use Request for district spaces.

Important: Many districts require external (community) Group Managers to upload the Group's insurance certificate (in PDF or JPG format) and enter the insurance expiration date the first time you log into the system as described on the next page of this Guide.

(continued on next page)

Add Group Insurance Information

ML Schedules™ User Profile screen



Edit Group Information icon

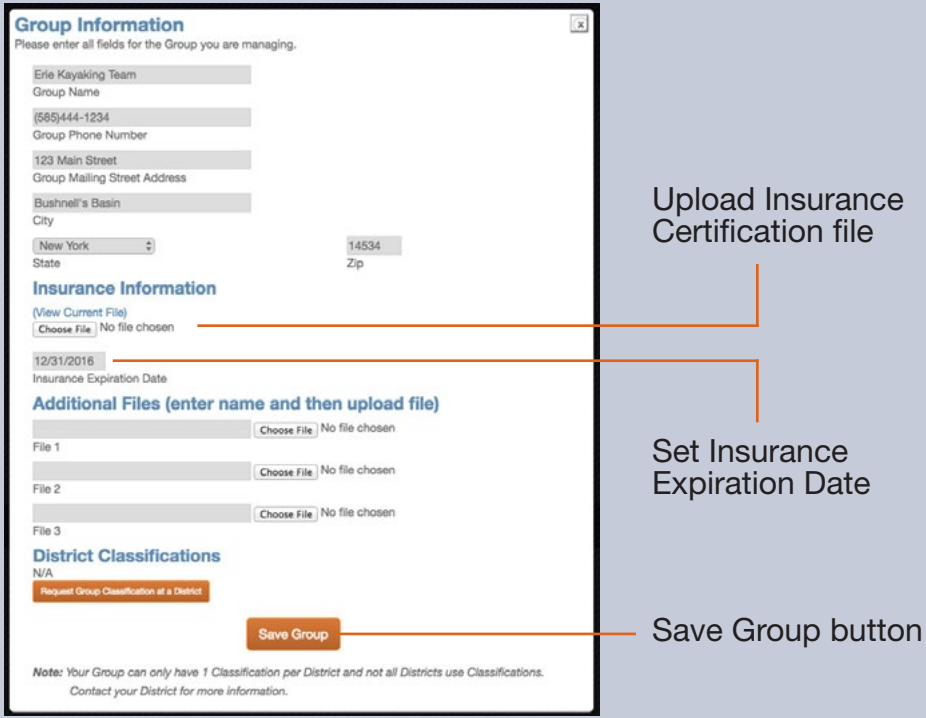
If your district requires community Group insurance information, your User Profile screen will be displayed the first time you log into the software.

To add the required community Group insurance information:

1. Select the Edit ( ) icon next to the Group name to display a new window with the selected Group's current information.

Add Group Insurance Information (cont.)

ML Schedules™ Group Information screen



In the Insurance Information section of the Group Information screen:

2. Select the **Choose File** button and navigate to the desired file from your local drive. Select OK.
3. Enter the Insurance Expiration Date field.
4. Select the **Save Group** button.

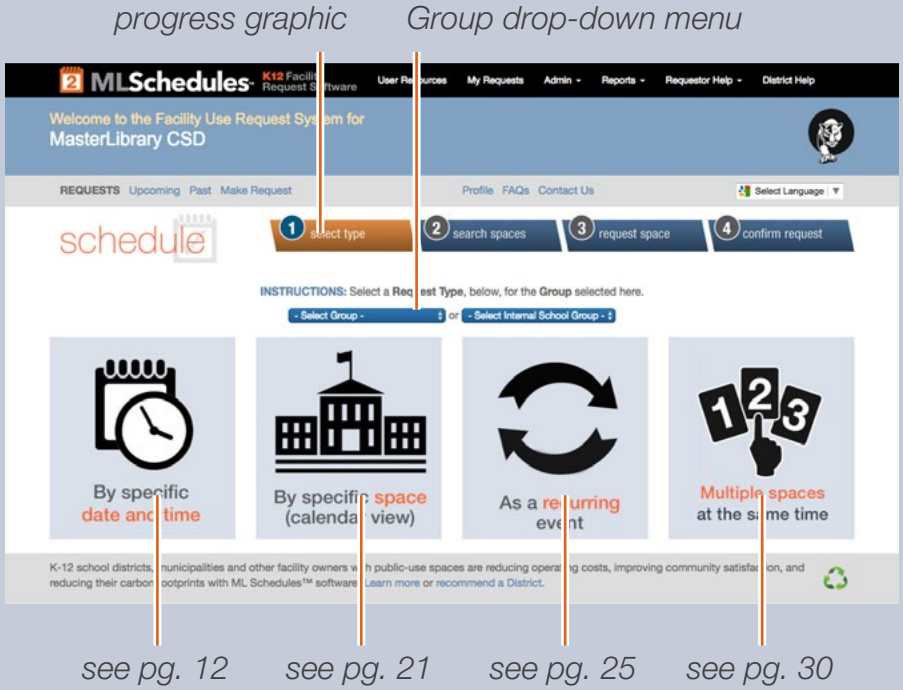
Your User Profile screen will be displayed.

Notes:

- You will only need to perform this procedure once per Group that you manage.
- The red flag icon ( ) will be displayed after login next to your email address in the top white bar if your Group's insurance information is about to or has already expired.

3. Submit Facility Requests

ML Schedules™ Select Request Type screen



You can submit **four different types** of Facility Use Requests using ML Schedules™ Software:

A. By specific time and date *(see pg. 12)*
B. By a specific space (calendar view) *(see pg. 21)*
C. As a recurring event either in the same or in different spaces *(see pg. 25)*
D. Multiple spaces at the same time (e.g., gym, locker rooms and concession area) *(see pg. 30)*

Note the progress graphic that shows the four steps to make a reservation regardless of type. The current step is shown in **orange** to help guide you through the process.

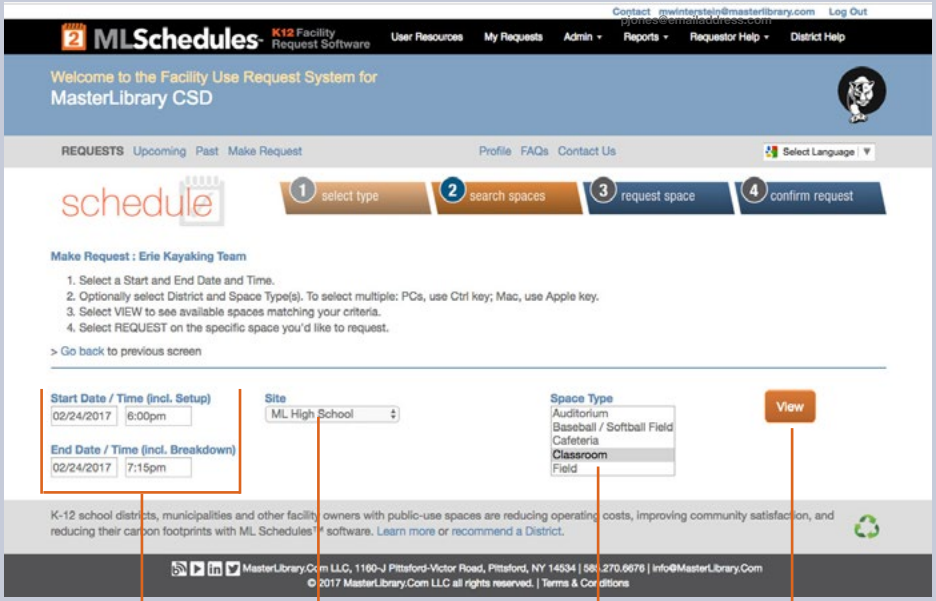
Select a Request Type

1. **If managing more than one Group:** Select the appropriate name from the **Group** drop-down menu.
2. Select the type of Facility Request you want to submit.

Go to the page number shown on the graphic at left for instructions on submitting that type of request.

3-A. Request a Date and Time

ML Schedules™ Search Spaces screen



A. Request a Specific Date and Time

By specific date and time

All request types require four basic steps:

1. Search spaces by date(s) for availability.
2. Request the available space(s).
3. Provide additional Request information including the need for support personnel and/or equipment.
4. Confirm and submit your Request.

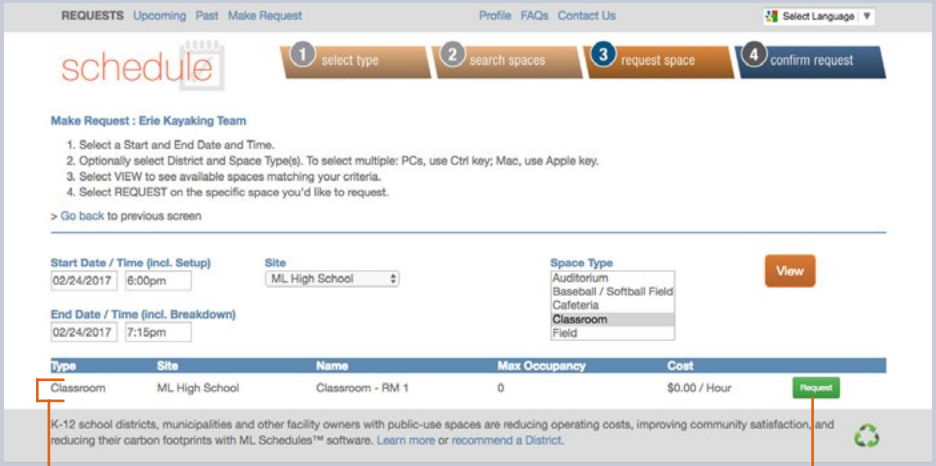
Search Spaces

1. Select the **Start Date** field.
   A calendar will be displayed that you can advance through to select the desired Start Date.
2. Repeat for the **End Date** field.
3. Select **Start** and **End Times** from the drop-down menu. Start and End times are available in 15-minute intervals.
4. Select a **Site** and/or **Space Type.**

(continued on next page)

3-A. Request a Date and Time (cont.)

ML Schedules™ Search Spaces screen with available spaces shown



available spaces

Request button

Note: You can select multiple Space Types by holding the following keys while selecting additional menu items:

- PC: Ctrl key
- Mac: Apple key

5. Select the **View** button to see if the selected space is available at the desired date(s) and times.

Note: If the desired space is not available, no results will be shown. Try changing the settings in one or more of fields to find available spaces.

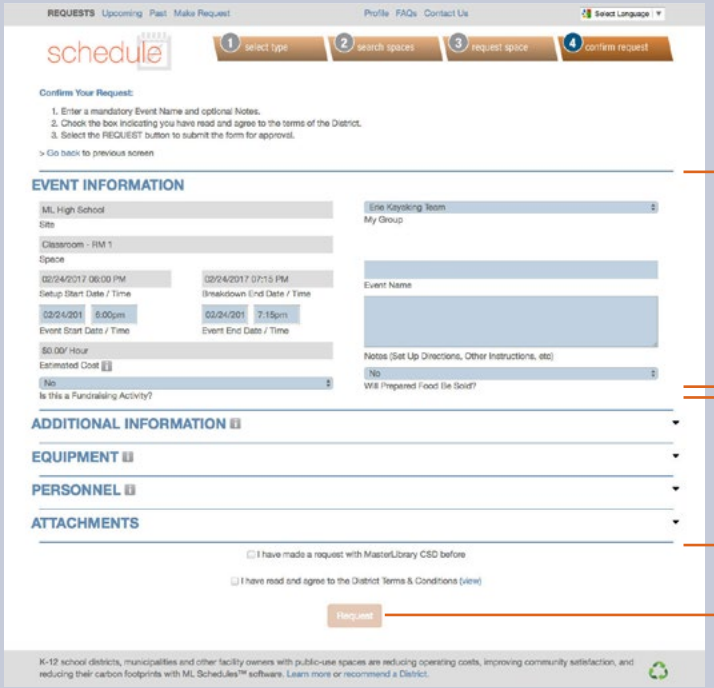
Request the available Space

6. Select the **Request** button on the same line as the desired space, noting its maximum occupancy and hourly rate.

(continued on next page)

3-A. Request a Date and Time (cont.)

ML Schedules™ Confirm Request screen



Event information section

Other sections (collapsed view)

Request button

Provide Additional Request Information

By specific date and time

The **Confirm Request** screen will be displayed with the previously selected space and reservation criteria already completed.

The **Confirm Request** screen provides five sections to provide more data about the requested event including:

A. **Event Information** (see pg. 15)
B. **Additional Information** (see pg. 15)
C. **Equipment** (see pg. 17)
D. **Personnel** (see pg. 18)
E. **Attachments** (see pg. 19)

Note that your district may not use all the fields described.

(continued on next page)

3-A. Request a Date and Time (cont.)

Event Information section *of the Confirm Request screen*

A. Event Information fields

These fields allow you to provide basic information about the Request including:

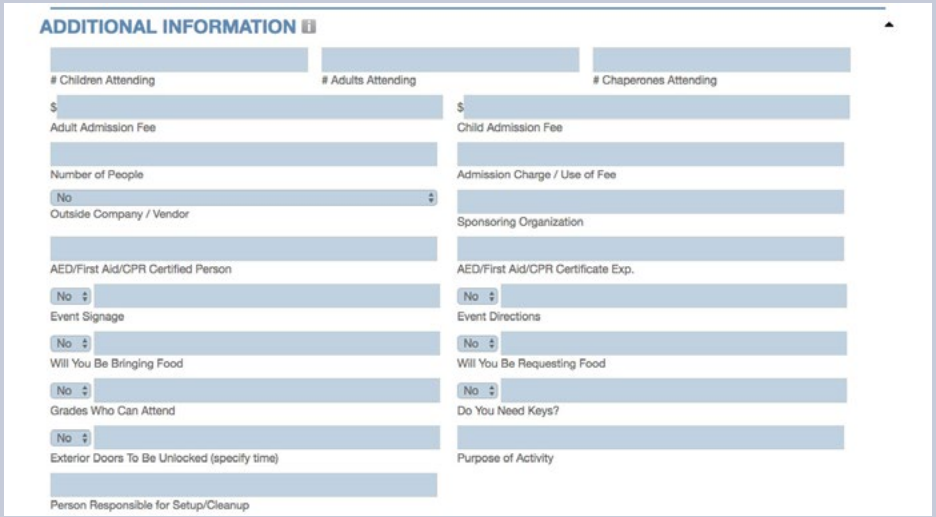
- **Event Name.** Make the name meaningful to the general public, not just your Group, as all Community Users will see Event Names on calendars.
- **Event Notes.** May be visible to the general public if the district chooses to display event details.
- **Is this a fundraising event?**
- **Will prepared food be sold?**

Multiple Group Managers: Check that the correct **My Group** is displayed for the Request. If the wrong Group is selected, select your browser's Back button to go back to the initial Request form where you can select the correct Group.

(continued on next page)

3-A. Request a Date and Time (cont.)

Additional Information section *of the Confirm Request screen*



Note that your district may not use all the fields shown here.

B. Additional Information fields

These fields allow you to provide more detailed information about the event. Some of these fields may be required by your district to submit the Request.

- No. of children, adults and chaperones attending
- Adult and Child admission fees
- Total No. of people expected and admission charge
- AED/First Aid/CPR Certified Person with certification expiration date

Other fields in this section:

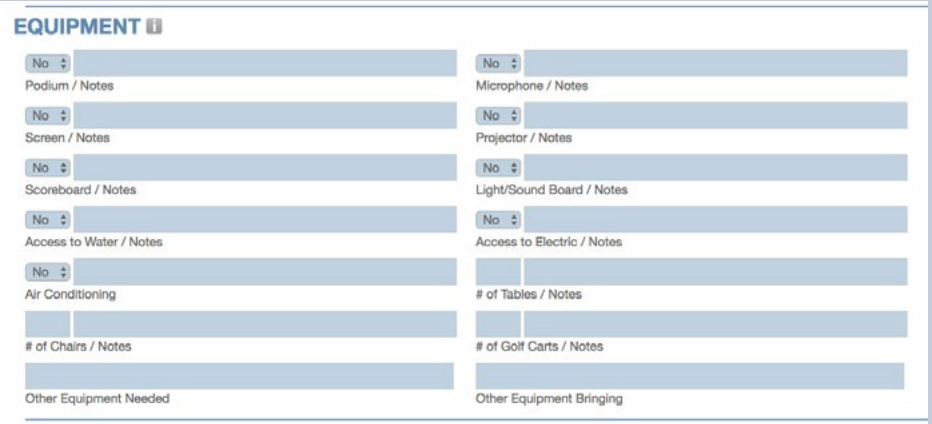
- Let you request signage, directions, room keys, and for the space to be unlocked at a specific time.
- Define other Request parameters including food-related questions, grade levels who can attend, event purpose and person responsible for setup/cleanup.

Note: The available field displayed on Request forms are based on district selections. Not all the fields listed here may be available from your district.

(continued on next page)

3-A. Request a Date and Time (cont.)

Equipment section *of the Confirm Request screen*



Note that your district may not use all the fields shown here.

C. Equipment fields

These fields allow you to request supporting seats, tables, AV equipment and other items for the event. Notes including quantities needed can be entered for each item.

- Presentation items including podium, microphone, screen, projector, and light/soundboard
- Access to water, electric and/or air conditioning
- No. of tables, chairs and golf carts needed
- Other Equipment Needed and Bringing

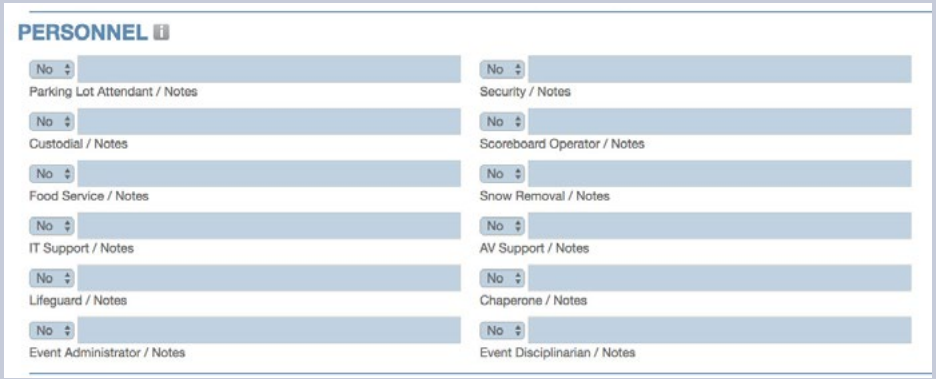
Your district may charge an additional fee for the use of supporting equipment.

Note: The available field displayed on Request forms are based on district selections. Not all the fields listed here may be available from your district.

(continued on next page)

3-A. Request a Date and Time (cont.)

Personnel section *of the Confirm Request screen*



Note that your district may not use all the fields shown here.

D. Personnel fields

By specific date and time

These fields allow you to request supporting district staff to assist with your event. Notes including quantities of support staff needed can be entered for each item. Possible fields include:

- Parking Lot Attendant
- Custodial
- Food Service
- IT Support
- Lifeguard
- Event Administrator
- Security
- Scoreboard Operator
- Snow Removal
- AV Support
- Chaperone
- Event Disciplinarian

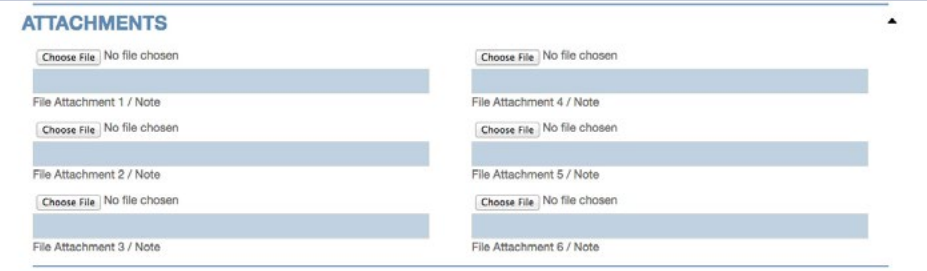
Your district may charge an additional fee for requested support staff.

Note: The available field displayed on Request forms are based on district selections. Not all the fields listed here may be available from your district.

(continued on next page)

3-A. Request a Date and Time (cont.)

***Attachments section** of the Confirm Request screen*



Note that your district may not use all the fields shown here.

E. Attachments fields

The Attachments fields allow you to upload and add notes for PDF and other files, some of which may be required by your district to submit a Request. Examples of attachments include:

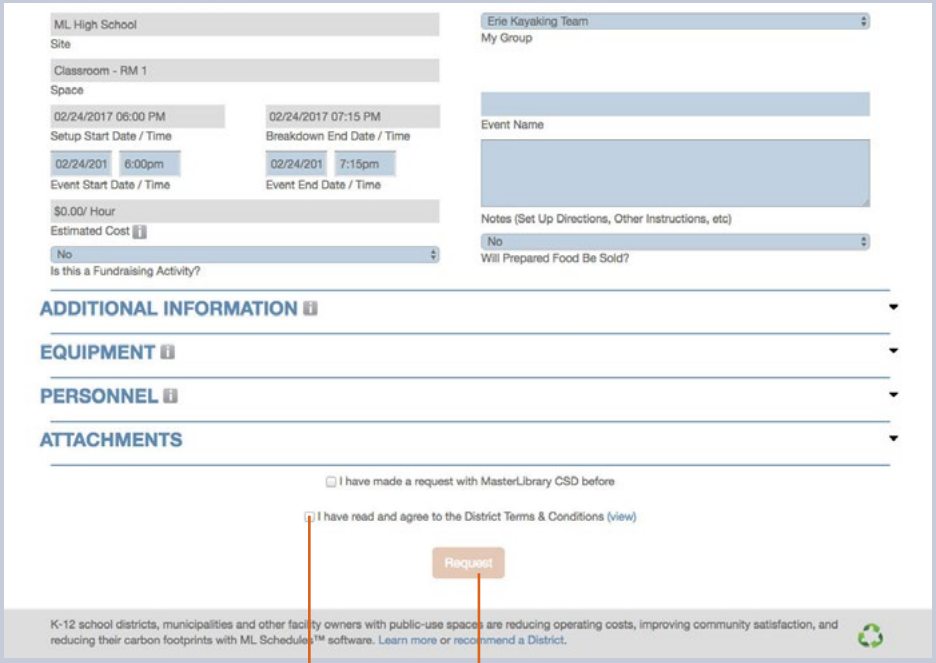
- Anti-hazing forms
- How you want the space setup for your event
- Event participant rosters

Note: Group Insurance certificates should be uploaded with other Group data using the procedure shown on pages 11 – 12 of this Guide.

(continued on next page)

3-A. Request a Date and Time (cont.)

ML Schedules™ Confirm Request screen, bottom



District Terms acceptance

Request button

Confirm and Submit your Request

By specific date and time

Once all mandatory and desired sections have been completed:

6. Select the check box signifying you have read and agree to district's Terms of Use.

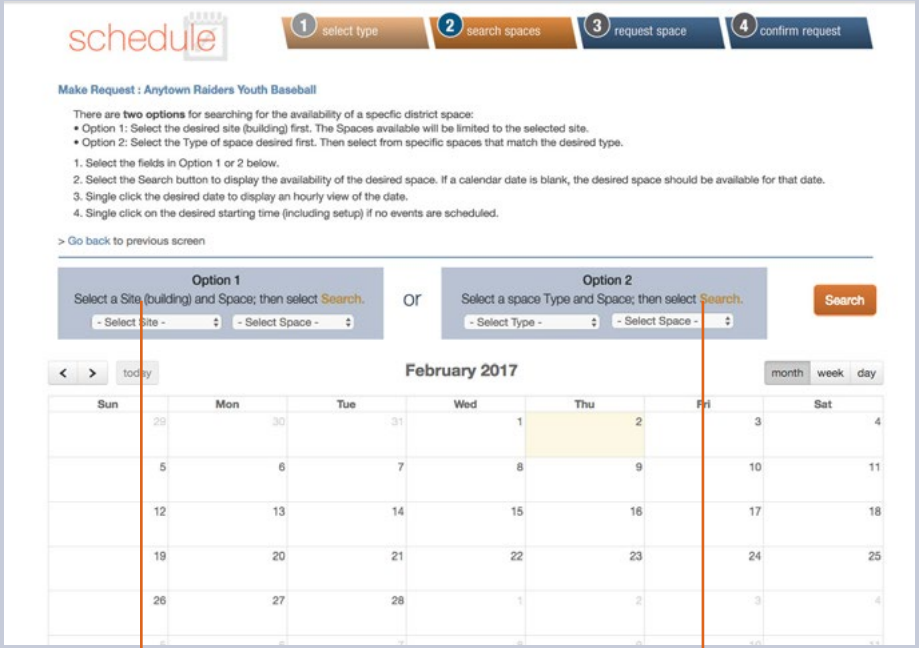
Note: The Terms of Use are available from the District's website.

7. Select the **Request** button to submit the Facility Use Request for review and approval.

A thank-you screen will be displayed indicating your Request is being processed and that you will be notified of its progress.

3-B. Request a Specific Space

ML Schedules™ Make Reservation Calendar View, Month screen



search by Site, then Space

search by Type, then Space

B. Request a Specific Space (Calendar View)

By specific space (calendar view)

All request types require four basic steps:

1. Search spaces by date(s) for availability.
2. Request the available space(s).
3. Provide additional Request information including the need for support personnel and/or equipment.
4. Confirm and submit your Request.

Search Spaces

There are two options for searching for a specific space:

1. Search by Site (e.g., High School), then Space
2. Search by Type (e.g., gym), then Space

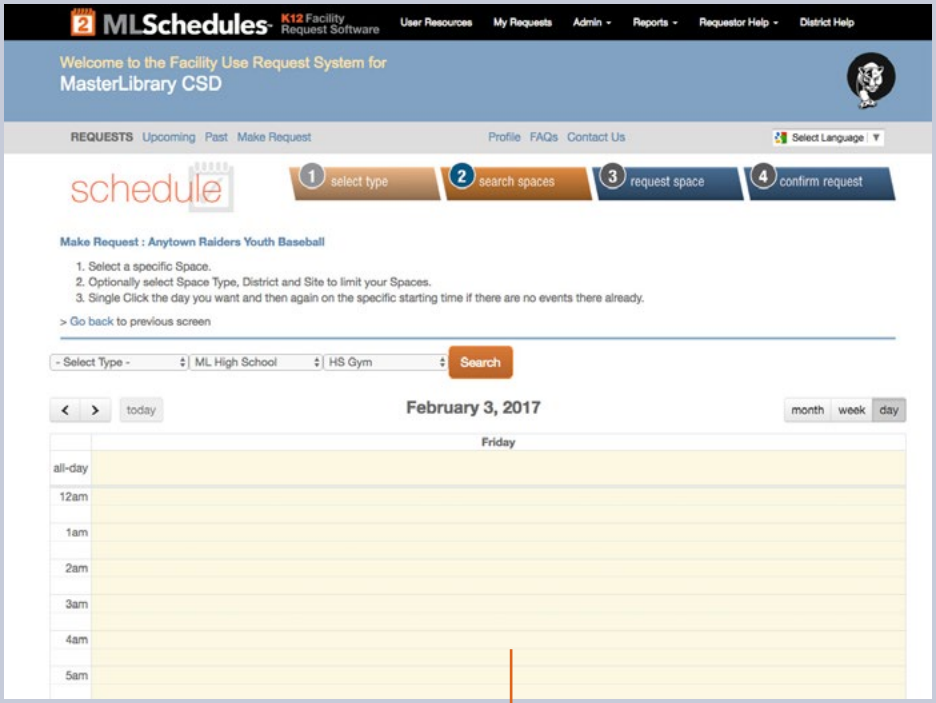
From the Make Request Calendar View screen:

1. Select the fields in either Option 1 or 2.
2. Select the **Search** button.

(continued on next page)

3-B. Request a Specific Space (cont.)

ML Schedules™ Make Reservation Daily Calendar View



single click on the event's starting time (including setup)

If the selected space is already requested (or pending approval), the booked event name or "Not Available" will appear on the calendar.

By specific space (calendar view)

3. Click on the desired **Start Date.**

A **Daily Calendar** view of the selected Start Date will be displayed.

Request Space

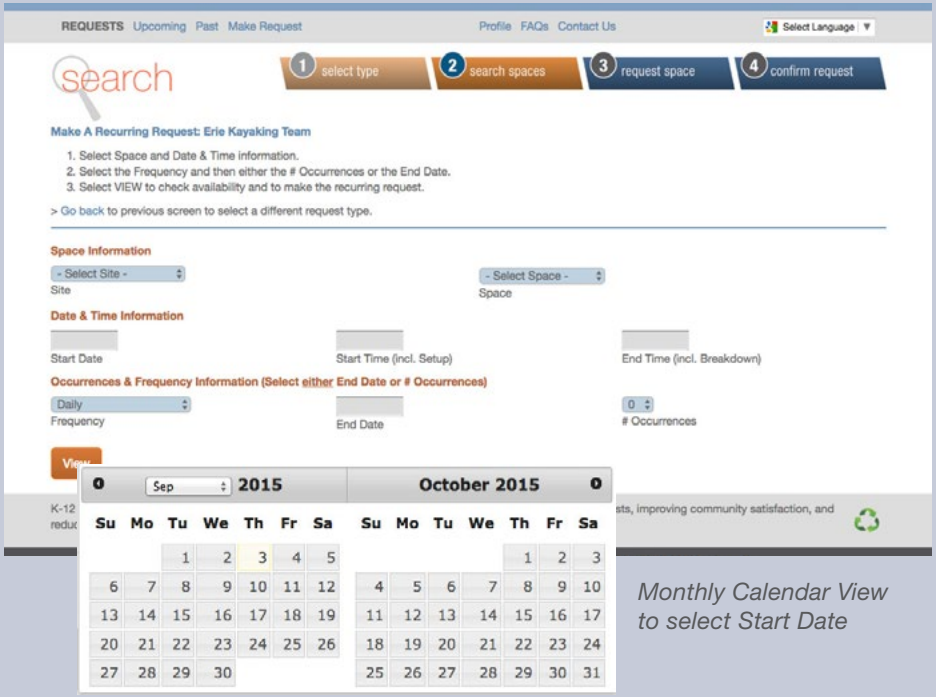
4. Click on the desired **Start Time** (including Setup)

The **Confirm Reservation** screen will be displayed as described on pages 15 of this Guide.

Provide Additional Information and Submit Request

5. Perform the steps on page 15 – 21 to submit the Facility Use Request for approval.

ML Schedules™ Make Recurring Request screen



Monthly Calendar View to select Start Date

C. Make a Recurring Request (either in the same or in different spaces)

As a recurring event

All request types require four basic steps:

1. Search spaces by date(s) for availability.
2. Request the available space(s).
3. Provide additional Request information including the need for support personnel and/or equipment.
4. Confirm and submit your Request.

Search Spaces

From the Make A Recurring Request screen:

1. Select a **Site** and **Space** from the drop-down menus.

Note: To add a different space in the same recurring request, select the desired space from the ***Add Another Space*** drop-down menu and continue to step 2.

2. Click on the desired **Start Date** field.

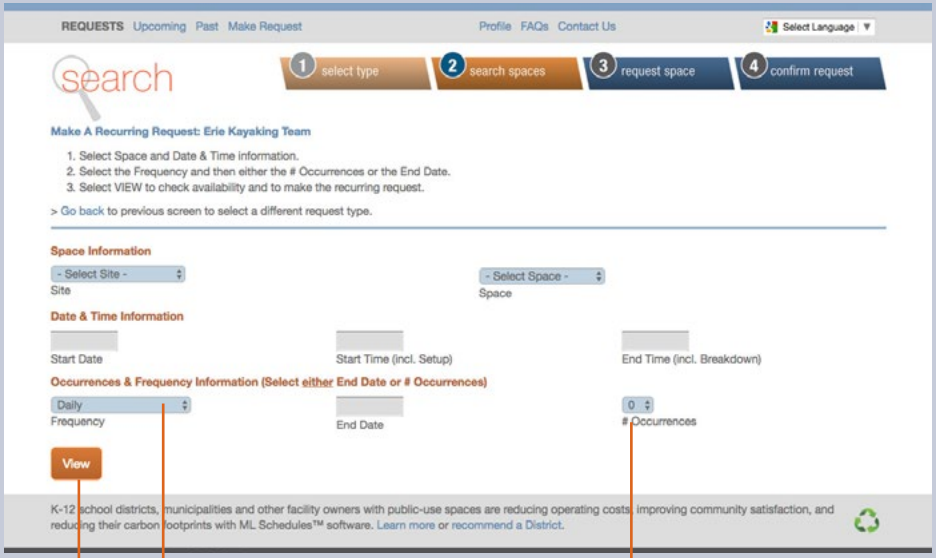
A **Monthly Calendar** will be displayed from which a Start Date can be selected.

3. Select a **Start Time** and **End Time** in 15-minute increments from the drop-down menus.

(continued on next page)

3-C. Make Recurring Request (cont.)

ML Schedules™ Make Recurring Request screen



Frequency menu

Occurrences menu

View button

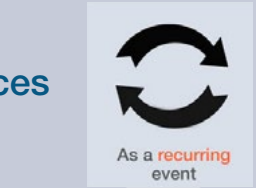
4. Either:

a. Select the **Number of (#) Occurrences** from the drop-down menu. Available selections range from 2 – 20.

Or:

b. Select the event **Frequency** from the drop-down menu:

- Daily (Mon. - Sun.)
- Daily – Weekdays Only (Mon. – Fri.)
- Weekly (on same day of week)
- Every Other Week
- Multiple Days Per Week
- Monthly



5. Select the **View** button to check space availability.

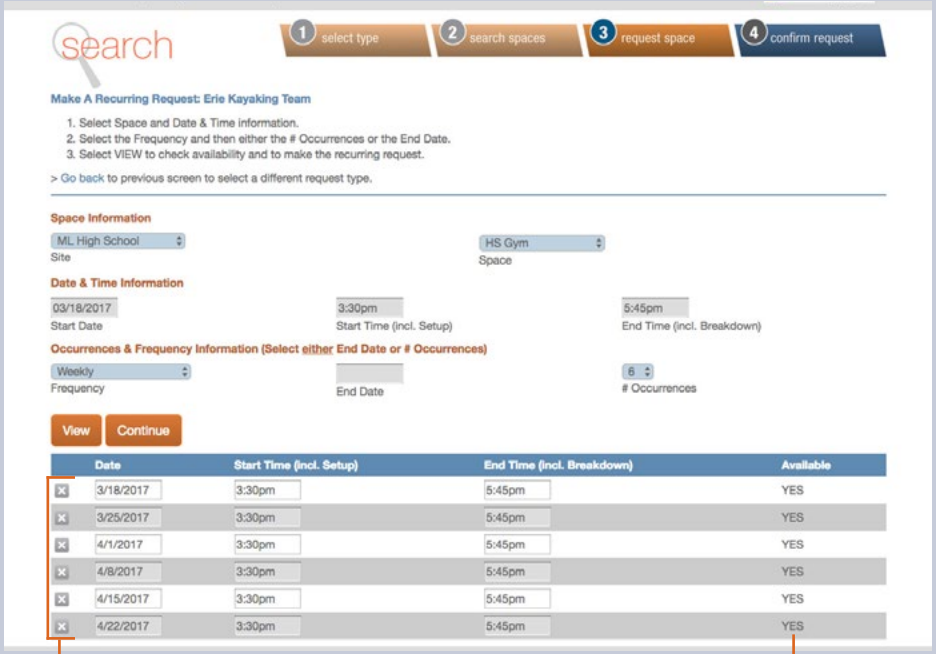
A list of each occurrence showing an Available status (Yes or No) for the selected space will be displayed.

Note: If the desired space is not available, try changing one or more of the field settings to find available spaces that meet your group's needs.

(continued on next page)

3-C. Make Recurring Request (cont.)

ML Schedules™ Make Recurring Reservation/Request Spaces screen



available spaces automatically selected

Available status

Request Space

As a recurring event

If the desired space **is available** for the selected start date, times and frequency, **Yes** will be displayed in the **Available** column. In the sample screen at left, the High School's Gymnasium is available from 3:30 – 5:45 p.m. on 6 consecutive Saturdays starting March 18.

6. Select the **Continue** button to confirm the recurring request. You will now be able to add more event data.

If the desired space **is not available** for the selected start date, times and frequency, **No** will be displayed in the **Available** column. To find available spaces:

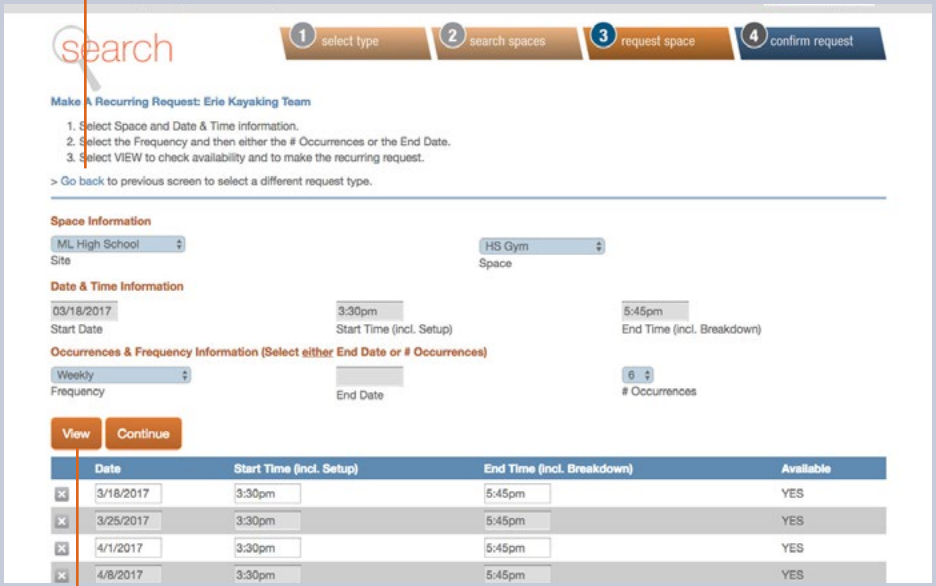
- Enter a different Date and/or Start and End Times to try to find an available time slot.
- The Available status will change to Yes if available
- Select the available space and proceed to step 6 above.

(continued on next page)

3-C. Make Recurring Request (cont.)

ML Schedules™ Make Recurring Reservation/Request Spaces screen

Go back to previous screen command



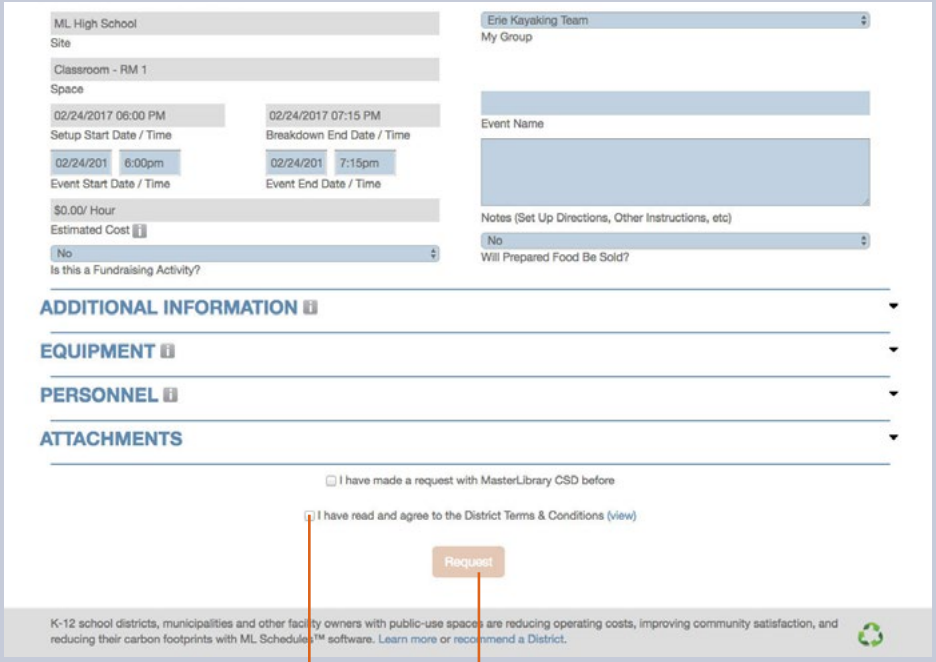
View button

Notes:

- To search using different parameters, enter new field data and select the **View** button.
- To select a different request type, select the **Go back to previous screen…**command under the online instructions.
- You can edit the **Date,** and **Start** and **End Time** fields before confirming the request.

3-C. Make Recurring Request (cont.)

ML Schedules™ Confirm Recurring Requests screen



District Terms acceptance

Request button

Provide Additional Information and Submit Request

As a recurring event

Once all mandatory and desired sections have been completed:

7. Select the check box signifying you have read and agree to the district's terms of use.

Note: The Terms of Use are usually available from the district's website.

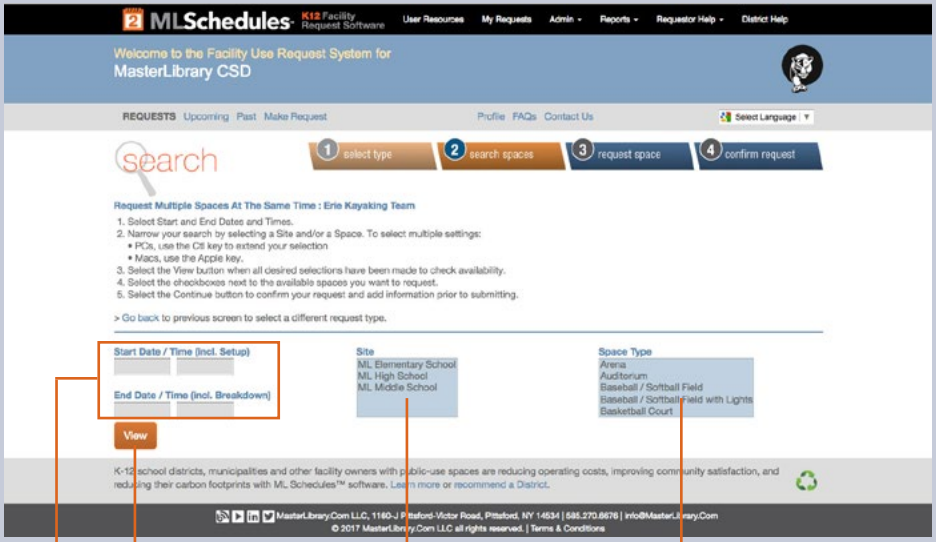
8. Select the **Request** button to submit the Facility Use Request for review and approval.

A thank-you screen will be displayed indicating your Request is being processed and that you will be notified of its progress.

Note that the requested space will now appear as **Pending Approval** to other community users when searching spaces if your district has enabled this feature.

3-D. Request Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen



D. Request Multiple Spaces at Once

Multiple spaces at the same time

This procedure allows you to search for and select multiple sites and space types based on specific dates and times. There are two ways you can search for spaces using this request type:

- All district sites and spaces *(pg. 27)*
- Specific sites and/or spaces in a district *(pg. 28)*

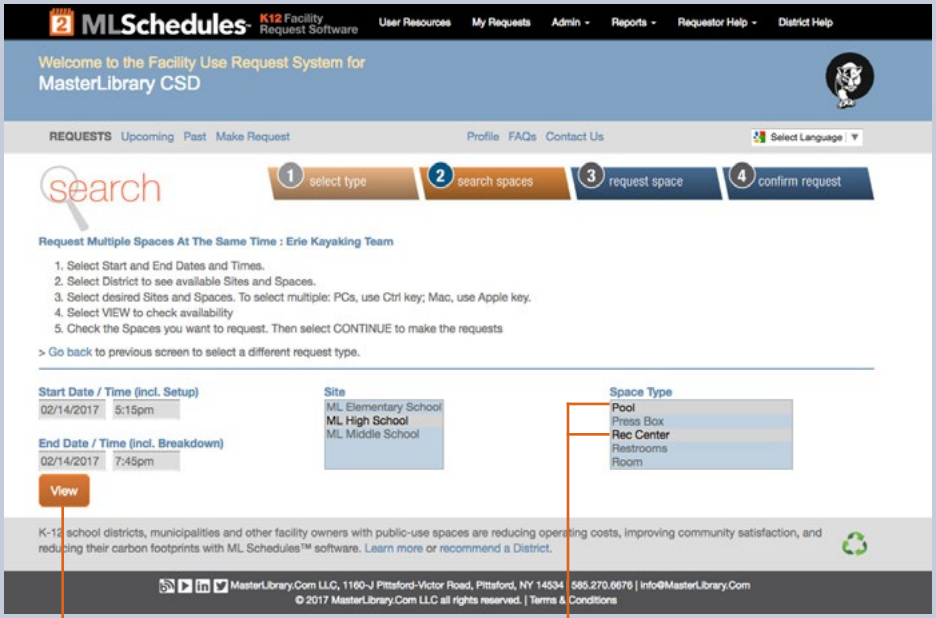
Search All Sites and Spaces in a District

1. Enter a **Start** and **End Date** from the calendar menu.
2. Enter a **Start** and **End Time** from the drop-down menus.
3. Select the **View** button to see what sites and spaces are available for the specified dates and times.

Go to page 29 to complete this procedure.

3-D. Request Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen



View button

multiple spaces selected at same site

Search for Specific Sites and Spaces at One Site

Multiple spaces at the same time

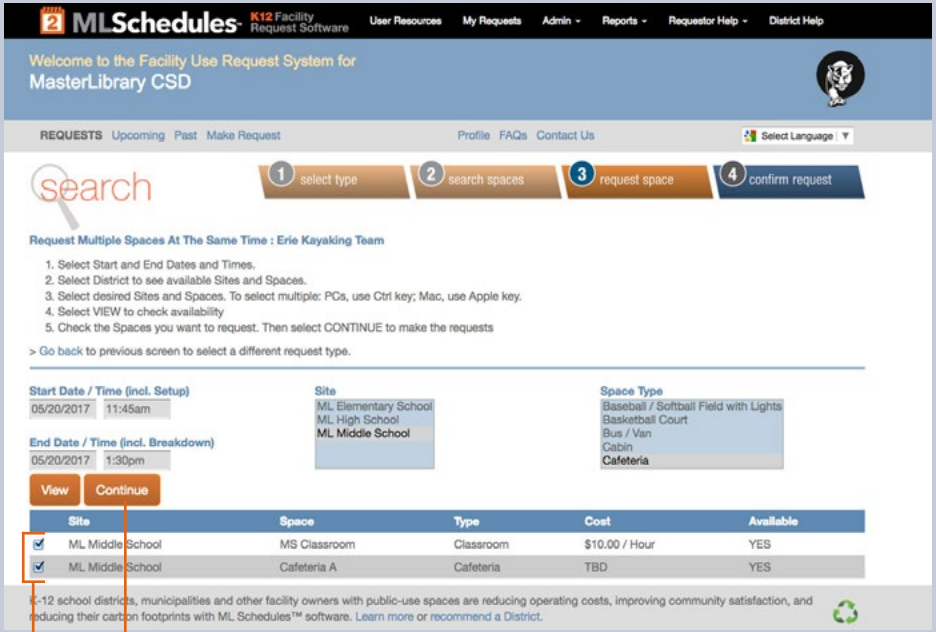
1. Enter a **Start** and **End Date.**
2. Enter a **Start** and **End Time.**
3. Select a **Site** from the drop-down menu.
4. **Optional:** Select the first **Space Type** desired.
5. Extend your **Space Type** selections by holding the following keys while clicking on additional items:
   - PC: Ctrl key
   - Mac: Apple key
6. Select the **View** button to see if the selected spaces are available for the desired date(s) and times.

Go to page 29 to complete this procedure.

(continued on next page)

3-D. Request Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen



Continue button

selected spaces to request

Select Spaces and Confirm Requests

Multiple spaces at the same time

To submit Multiple Requests:

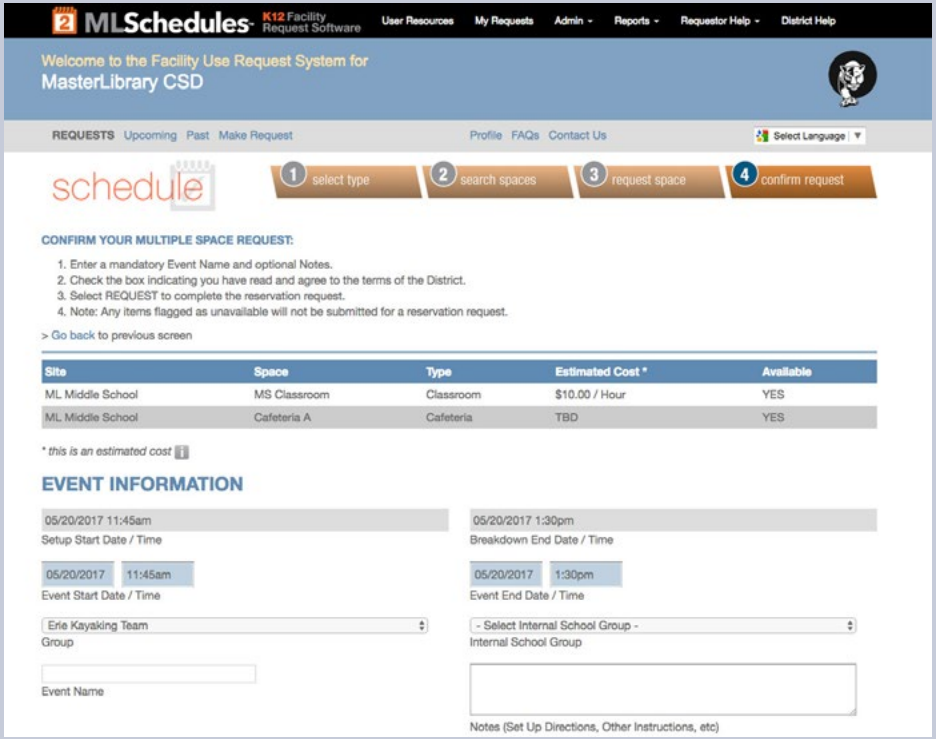
1. Select the check box next to each space shown as Available that you want to request.
2. Select the **Continue** button.

Note: If you want to look for other spaces, enter new search parameters and select the **View** button

(continued on next page)

3-D. Request Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen



Provide Additional Information and Submit Request

Multiple spaces at the same time

3. Compete the Event Information section (see pg. 15).
4. Add more information, request supporting staff and equipment, and add attachments (see pp. 16 – 19).
5. Select the check box at the bottom of the screen signifying that you agree to the district's Terms of Use.

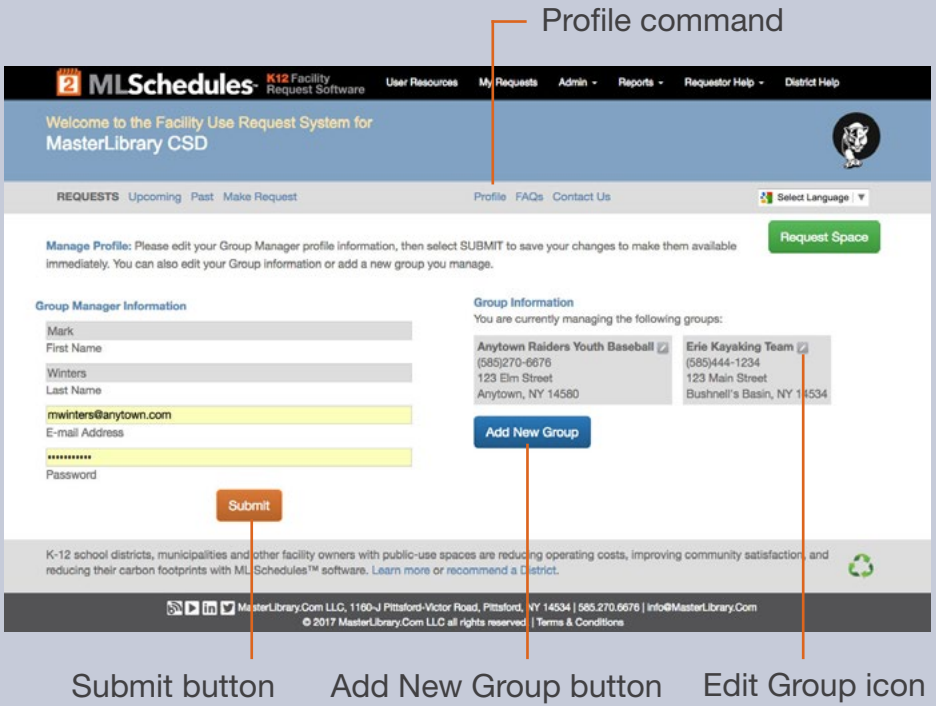
Note: The Terms of Use are available from the district's website.

6. Select the **Request** button to submit the Facility Use Request for review and approval.

A thank-you screen will be displayed indicating your Request is being processed and that you will be notified of its progress.

Edit a User Profile and Add Groups

ML Schedules™ User Profile screen



Edit Group Manager (User) information

1. Select ***Profile*** from the gray toolbar.

The Edit User Profile screen will be displayed.

2. Select and enter the new data in the desired fields.
3. Select the **Submit** button.

The updated information will be displayed.

Add a New Group

1. Select the **Add New Group** button.

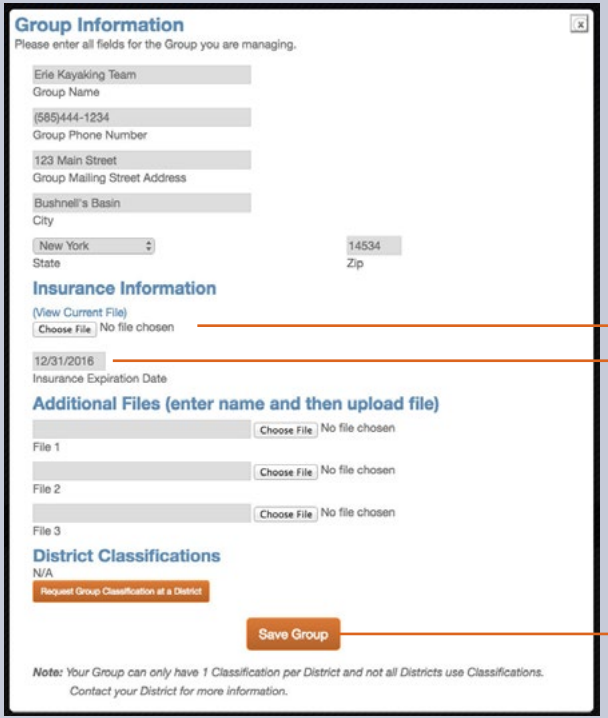
An Add New Group window will be displayed (see example on next page).

2. Enter the new Group information in all fields.
3. Select the **Submit** button.

The User Profile screen will be displayed with the new Group information.

Edit Group Information

ML Schedules™ Group Information screen



Upload Insurance Certification file

Set Insurance Expiration Date

Save Group button

To edit Group information

1. Select the Edit ( ) icon next to the Group name to display a new window with your current information.
2. Enter the new data in the desired fields.
3. Select the **Save Group** button.

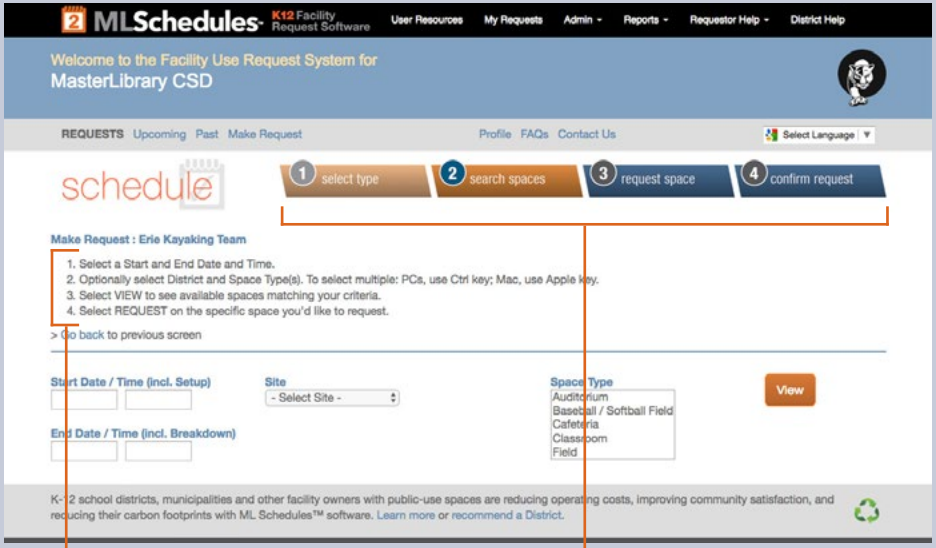
   The User Profile screen will display the new Group which will also appear in your Group drop-down menu when submitting a Facility Use Request.

To add Group Insurance information

See the procedure on pp. 11 – 12.

Other Resources

ML Schedules™ Online instructions and step-by-step graphic indicator



online instructions

step-by-step indicator

Thanks for using ML Schedules™ Software and we hope you found this *Quick Start Guide* helpful. If you want to learn more about the software or help MasterLibrary™ improve our products, please check out the following additional resources:

- On-screen instructions and step-by-step phase graphics that indicate your place in the process.
- ML Schedules™ Software's Resources web page for case studies, best practice tip sheets and more.
- MasterLibrary's Help blog site with step-by-step procedures for software users accessed through the Help menu within the software.

If you have a suggestion on how to improve the usability of ML Schedules™ software or this *Quick Start Guide,* please let us know using the Contact Us form.

© 2017, MasterLibrary LLC. All rights reserved. MasterLibrary and ML Schedules are trademarks of MasterLibrary LLC. All other product names mentioned are copyrights of their respective companies and all rights are acknowledged. Please handle this document electronically if possible: only print if needed and recycle when done. Thanks.