

# Basic User Quick Start Guide





Hi 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.

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## ML Schedules™ Software Commonly Used Icons

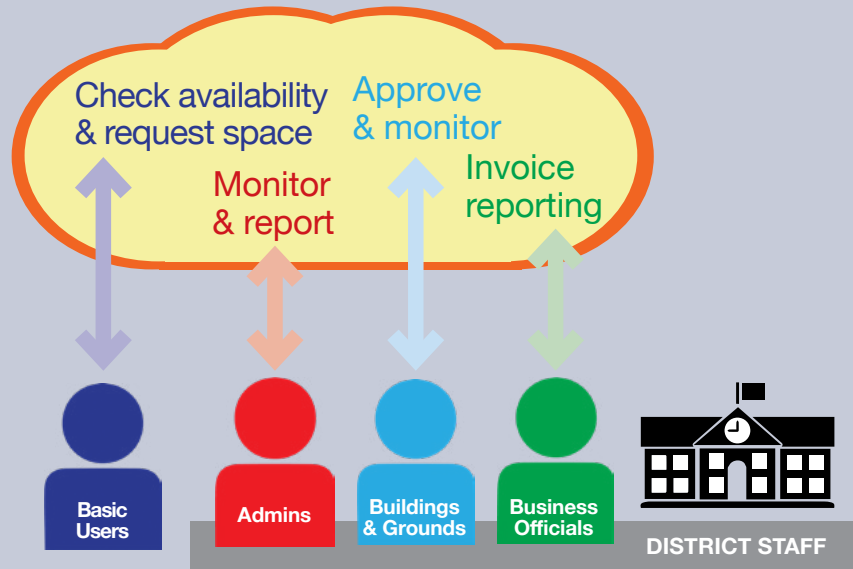
-  **Add/Create** new item (e.g., add Group)
-  **Edit** an existing item (e.g., a User or Group profile)
-  **Help** to open the online Help website
-  **Cancel** procedure or delete selected item

## ML Schedules™ Software Commonly Used Buttons

-  **View** to search for spaces that match entered criteria
-  **Request Space** to submit a completed Request form for approval by the district
-  **Continue** to select available spaces during a Recurring or Multiple Spaces at the Same Time requests
-  **Add New Group** in the User Profile page

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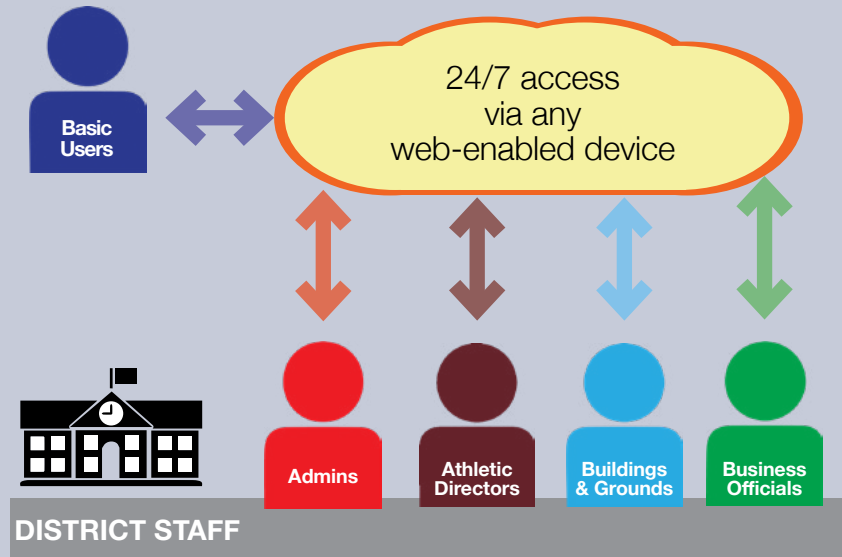
# How the software works



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. **Basic users** including school district staff and community members who submit Facility Requests.
2. **School administrators** responsible for managing the Facility 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 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 submitted 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 all this data into one secure place—the cloud.

# First-Time Overview



**register** for a  
new account  
*(only needed  
for first-time use)*



**log in** and  
request  
space(s)

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 district club 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 setup step is only necessary the first time you use the software. After that, you'll just log into your district's ML Schedules™ software account using your e-mail address and password to 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

The screenshot shows the ML Schedules™ Software login interface. At the top, there is a navigation menu with links for 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below this is a blue header with the text 'Welcome to the Facility Use Request System for MasterLibrary CSD'. The main content area contains a login form with the prompt 'Please enter your email address and password to Log In.' The form has two input fields: 'E-mail Address' and 'Password'. Below the 'E-mail Address' field is a 'Log In' button. To the right of the 'Password' field are two links: 'Create New Account (video)' and 'Send Password Reminder'. A red vertical line originates from the 'Create New Account (video)' link and points down to the text 'Create New Account' located below the screenshot.

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

Welcome to the Facility Use Request System for MasterLibrary CSD

**New Account Setup**  
Please complete all fields and upload the requested documents (in PDF or JPG format) to create a new ML Schedules™ Software user account and related Group(s).

**USER INFORMATION.**

First Name  Last Name   
E-mail Address  Confirm E-mail Address   
Password  Confirm Password

**GROUP INFORMATION.** If you are an internal district staff member who will be submitting requests on your own behalf (i.e. not for a group, team, club, etc), use your first and last name as the Group Name.

Group Name  Phone Number   
Street / Mailing Address  City   
State  Zip Code

**ADDITIONAL GROUP INFORMATION.**

Group Classification

Class	Description
District Groups	District Staff Members
For-Profit	Private parties, commercial, business and profit-making organizations. A rental fee and payment of personnel fees will be required when any group or individual organization requests use of any facility for private gain.

## 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

### Additional Group Information

- Requested Group Classification (e.g., 1 for district clubs; 5 for external for-profit non-school groups)

(continued on next page)



## 1. Register new account (cont.)

ML Schedules™ Register screen (cont. from previous page)

The screenshot displays the 'Register' screen with the following elements:

- Group Classification:** A dropdown menu with '- Please Select -'.
- Class Description Table:**

Class	Description
District Groups	District Staff Members
For-Profit Groups	Private parties, commercial, business and profit-making organizations. A rental fee and payment of personnel fees will be required when any group or individual organization requests use of any facility for private gain.
Non-Profit Groups	The group or organization has been approved by the Superintendent as an "approved school-related group" or as a non-profit group (i.e. does not collect a fee for private gain). A minimal rental fee may be required. Class 2 groups will be charged a custodial fee if a custodian is required outside of normal working hours.
- Non-District Groups:** A section for uploading the group's Certificate of Insurance and its Expiration Date. It includes a 'Choose File' button (with 'No file chosen' text) and an 'Expiration Date' field.
- Additional Group Files:** A section for uploading additional files. It includes a header 'Enter name and then upload file.' and three rows, each with a text input field, a 'Choose File' button (with 'No file chosen' text), and a file name label (File 1, File 2, File 3).
- Create User Account:** An orange button at the bottom center.
- Note:** 'Your Group can only have 1 Classification per District and not all Districts use Classifications. Contact your District for more information.'

Choose File button to upload insurance certificate

insurance certificate Expiration Date field

Create User Account button

## Enter User and Group information (cont.)

### Additional Group Information (cont.)

- If you will be submitting requests on behalf of an **external community group** (e.g., for a scout troop, community athletic league), it is highly recommended that you:

- Use the **Choose File** button to upload a copy of the group's current insurance certificate in PDF or JPG file format, and;
- Enter the insurance **Expiration Date** in the appropriate field.

When all the data is entered:

4. Select the **Create User Account** 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.

## 2. Log in

ML Schedules™ Software sample school district login page

**E-mail Address**

**Password**

**Log In button**

### 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

The screenshot shows the ML Schedules user profile interface. At the top, there is a navigation bar with the ML Schedules logo and various menu items like 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below this is a welcome message for the Facility Use Request System for MasterLibrary CSD. The main content area is titled 'Manage Profile' and includes a 'Request Space' button. The 'Group Manager Information' section contains fields for 'Mark', 'First Name', 'Winters', 'Last Name', 'E-mail Address', and 'Password', with a 'Submit' button. The 'Group Information' section lists groups currently managed by the user, including 'Anytown Raiders Youth Baseball' and 'Erie Kayaking Team'. An 'Add New Group' button is located below the list. A red line points from the 'Edit Group Information icon' label below to the edit icon next to the 'Anytown Raiders Youth Baseball' group name.

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

The screenshot shows the 'Group Information' form with the following fields and sections:

- Group Information:** Group Name (Erie Kayaking Team), Group Phone Number (565444-1234), Group Mailing Street Address (123 Main Street), City (Bushnell's Basin), State (New York), Zip (14534).
- Insurance Information:** (View Current File), Choose File (No file chosen), Insurance Expiration Date (12/31/2016).
- Additional Files (enter name and then upload file):** File 1, File 2, File 3 (each with a 'Choose File' button and 'No file chosen' text).
- District Classifications:** N/A, Request Group Classification at a District button.
- Save Group button:** A prominent orange button at the bottom.

Annotations with orange lines point to:


- 'Choose File' button in the Insurance Information section: Upload Insurance Certification file
- '12/31/2016' field: Set Insurance Expiration Date
- 'Save Group' button: Save Group button

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.

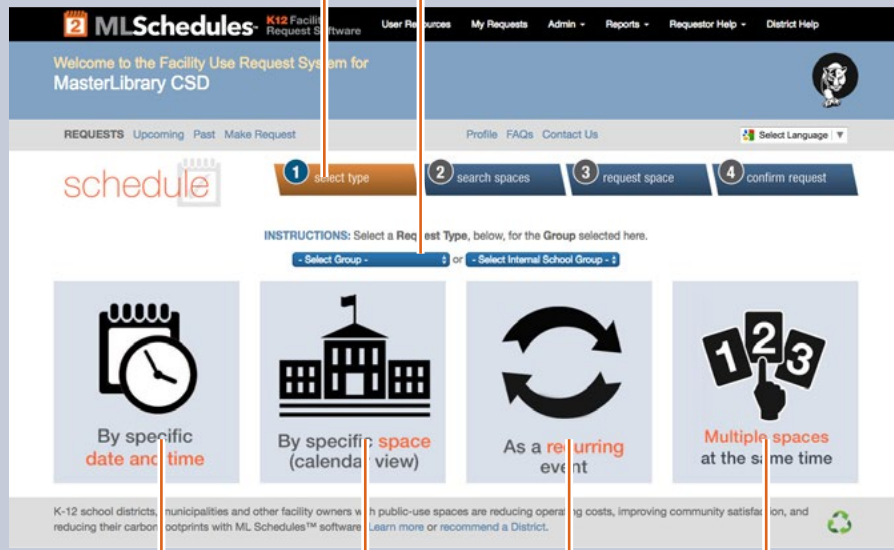
## Notes:

- 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

progress graphic      Group drop-down menu



see pg. 12

see pg. 21

see pg. 25

see pg. 30

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

Start Date / Time (incl. Setup)  
02/24/2017 | 6:00pm

End Date / Time (incl. Breakdown)  
02/24/2017 | 7:15pm

Site  
ML High School

Space Type  
Auditorium  
Baseball / Softball Field  
Cafeteria  
Classroom  
Field

View

Start and  
End Dates

Site  
menu

Space Type  
menu

View button

## A. Request a 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**.



By specific  
date and time

*(continued on next page)*

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

ML Schedules™ Search Spaces screen with available spaces shown

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

1 select type 2 search spaces 3 request space 4 confirm request

Make Request : Erie Kayaking Team

1. Select a Start and End Date and Time.
2. Optionally select District and Space Type(s). To select multiple: PCs, use Ctrl key; Mac, use Apple key.
3. Select VIEW to see available spaces matching your criteria.
4. Select REQUEST on the specific space you'd like to request.

> Go back to previous screen

Start Date / Time (incl. Setup) 02/24/2017 6:00pm Site ML High School Space Type Auditorium Baseball / Softball Field Cafeteria Classroom Field View

End Date / Time (incl. Breakdown) 02/24/2017 7:15pm

Type	Site	Name	Max Occupancy	Cost	
Classroom	ML High School	Classroom - RM 1	0	\$0.00 / Hour	Request

K-12 school districts, municipalities and other facility owners with public-use spaces are reducing operating costs, improving community satisfaction, and reducing their carbon footprints with ML Schedules™ software. [Learn more](#) or [recommend a District](#).

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)



By specific  
date and time

### 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

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*

Estimated Cost and  
More Info button

My Group

Event Name

**EVENT INFORMATION**

ML High School  
Site

Classroom - RM 1  
Space

02/24/2017 06:00 PM  
Setup Start Date / Time

02/24/2017 07:15 PM  
Breakdown End Date / Time

02/24/2017 6:00pm  
Event Start Date / Time

02/24/2017 7:15pm  
Event End Date / Time

\$0.00/ Hour  
Estimated Cost ⓘ

No  
Is this a Fundraising Activity?

Erie Kayaking Team  
My Group

Event Name

Notes (Set Up Directions, Other Instructions, etc)

No  
Will Prepared Food Be Sold?

Fundraising activity?

Will prepared food be sold?

Event Notes  
visible to public

### 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 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)*



By specific  
date and time

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

*Additional Information section of the Confirm Request screen*

**ADDITIONAL INFORMATION**

# Children Attending      # Adults Attending      # Chaperones Attending

\$ \_\_\_\_\_ \$ \_\_\_\_\_

Adult Admission Fee      Child Admission Fee

Number of People      Admission Charge / Use of Fee

No      \_\_\_\_\_

Outside Company / Vendor      Sponsoring Organization

\_\_\_\_\_

AED/First Aid/CPR Certified Person      AED/First Aid/CPR Certificate Exp.

No      No

Event Signage      Event Directions

No      No

Will You Be Bringing Food      Will You Be Requesting Food

No      No

Grades Who Can Attend      Do You Need Keys?

No      \_\_\_\_\_

Exterior Doors To Be Unlocked (specify time)      Purpose of Activity

\_\_\_\_\_

Person Responsible for Setup/Cleanup

*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.



By specific  
date and time

- 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*

**EQUIPMENT**

No [v] Podium / Notes	No [v] Microphone / Notes
No [v] Screen / Notes	No [v] Projector / Notes
No [v] Scoreboard / Notes	No [v] Light/Sound Board / Notes
No [v] Access to Water / Notes	No [v] Access to Electric / Notes
No [v] Air Conditioning	No [v] # of Tables / Notes
No [v] # of Chairs / Notes	No [v] # of Golf Carts / Notes
No [v] Other Equipment Needed	No [v] Other Equipment Bringing

*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*

PERSONNEL ⓘ	
No ▾ Parking Lot Attendant / Notes	No ▾ Security / Notes
No ▾ Custodial / Notes	No ▾ Scoreboard Operator / Notes
No ▾ Food Service / Notes	No ▾ Snow Removal / Notes
No ▾ IT Support / Notes	No ▾ AV Support / Notes
No ▾ Lifeguard / Notes	No ▾ Chaperone / Notes
No ▾ Event Administrator / Notes	No ▾ Event Disciplinarian / Notes

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

### D. Personnel fields

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
- Security
- Custodial
- Scoreboard Operator
- Food Service
- Snow Removal
- IT Support
- AV Support
- Lifeguard
- Chaperone
- Event Administrator
- 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.

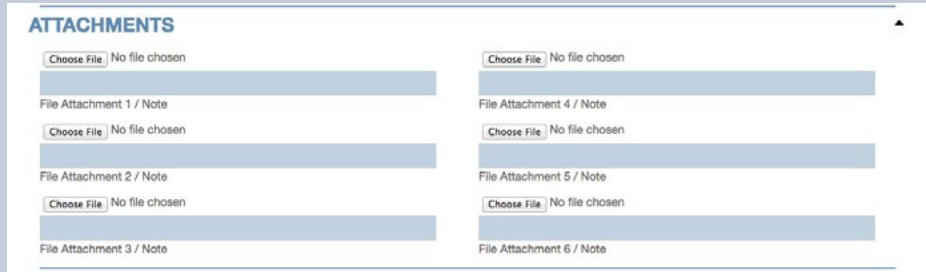
*(continued on next page)*



By specific  
date and time

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

*Attachments section of the Confirm Request screen*



**ATTACHMENTS**

Choose File No file chosen  
File Attachment 1 / Note

Choose File No file chosen  
File Attachment 2 / Note

Choose File No file chosen  
File Attachment 3 / Note

Choose File No file chosen  
File Attachment 4 / Note

Choose File No file chosen  
File Attachment 5 / Note

Choose File No file chosen  
File Attachment 6 / Note

*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)*



By specific  
date and time

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

ML Schedules™ Confirm Request screen, bottom

The screenshot shows the bottom portion of the 'Confirm Request' screen. It includes several form fields: 'ML High School' (Site), 'Erie Kayaking Team' (My Group), 'Classroom - RM 1' (Space), '02/24/2017 06:00 PM' (Setup Start Date / Time), '02/24/2017 07:15 PM' (Breakdown End Date / Time), '02/24/201 6:00pm' (Event Start Date / Time), '02/24/201 7:15pm' (Event End Date / Time), '\$0.00/ Hour' (Estimated Cost), 'No' (Is this a Fundraising Activity?), 'Event Name', 'Notes (Set Up Directions, Other Instructions, etc)', and 'No' (Will Prepared Food Be Sold?). Below these fields are expandable sections for 'ADDITIONAL INFORMATION', 'EQUIPMENT', 'PERSONNEL', and 'ATTACHMENTS'. At the bottom, there are two checkboxes: 'I have made a request with MasterLibrary CSD before' and 'I have read and agree to the District Terms & Conditions (view)'. A red line points from the 'Request' button to the second checkbox. A 'Request' button is located at the bottom center of the form area.

District Terms acceptance

Request button

### Confirm and Submit your Request

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.



By specific  
date and time

## 3-B. Request a Specific Space

ML Schedules™ Make Reservation Calendar View, Month screen

**schedule**

1 select type 2 search spaces 3 request space 4 confirm request

**Make Request : Team 1**

There are two options for searching for the availability of a specific space:

- Option 1: Select the desired site (building) first. The Spaces available will be limited to the selected site.
- Option 2: Select the Type of space desired first. Then select from specific spaces that match the desired type.

After clicking "Search", click the day you are looking to reserve, then click to the right of the time your event starts if there is not already an event there.

> Go back to previous screen

**Option 1**  
Select a Site (building) and Space; then select Search.

- Select Site -  
- Select Space -

**OR**

**Option 2**  
Select a space Type and Space; then select Search.

- Select Type -  
- Select Space -

**Search**

March 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

search by Site, then Space

search by Type, then Space

## B. Request a 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.



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

ML Schedules™ Make Reservation Daily Calendar View

The screenshot displays the ML Schedules web application interface. At the top, there is a navigation bar with the ML Schedules logo and various menu items like 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below this is a blue banner with the text 'Welcome to the Facility Use Request System for MasterLibrary CSD'. A secondary navigation bar includes 'REQUESTS', 'Upcoming', 'Past', 'Make Request', 'Profile', 'FAQs', 'Contact Us', and a 'Select Language' dropdown. The main content area features a 'schedule' logo and a four-step process: 1. select type, 2. search spaces, 3. request space, and 4. confirm request. Below this, there is a section for 'Make Request : Anytown Raiders Youth Baseball' with three numbered instructions: 1. Select a specific Space, 2. Optionally select Space Type, District and Site to limit your Spaces, and 3. Single Click the day you want and then again on the specific starting time if there are no events there already. A 'Go back to previous screen' link is provided. A search bar contains '- Select Type -', 'ML High School', 'HS Gym', and a 'Search' button. Below the search bar, there are navigation controls for 'today', 'February 3, 2017', and view options for 'month', 'week', and 'day'. The main calendar area shows a grid for 'Friday' with time slots from 'all-day' to '5am'. A vertical orange line is positioned at the 5am slot.

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.

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.





## 3-C. Make Recurring Request

ML Schedules™ Make Recurring Request screen

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

search 1 select type 2 search spaces 3 request space 4 confirm request

Make A Recurring Request: Erie Kayaking Team

1. Select Space and Date & Time Information.  
2. Select the Frequency and then either the # Occurrences or the End Date.  
3. Select VIEW to check availability and to make the recurring request.

> Go back to previous screen to select a different request type.

Space Information

- Select Site - - Select Space -  
Site Space

Date & Time Information

Start Date Start Time (incl. Setup) End Time (incl. Breakdown)

Occurrences & Frequency Information (Select either End Date or # Occurrences)

Daily Frequency 0 # Occurrences

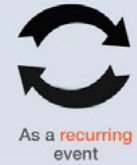
View

2015 October 2015

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5				1	2	3	
6	7	8	9	10	11	12	4	5	6	7	8	9	10
13	14	15	16	17	18	19	11	12	13	14	15	16	17
20	21	22	23	24	25	26	18	19	20	21	22	23	24
27	28	29	30				25	26	27	28	29	30	31

Monthly Calendar View to select Start Date

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



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) 25

## 3-C. Make Recurring Request (cont.)

ML Schedules™ Make Recurring Request screen

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

search 1 select type 2 search spaces 3 request space 4 confirm request

Make A Recurring Request: Erie Kayaking Team

1. Select Space and Date & Time Information.  
2. Select the Frequency and then either the # Occurrences or the End Date.  
3. Select VIEW to check availability and to make the recurring request.

> Go back to previous screen to select a different request type.

**Space Information**

- Select Site - Site - Select Space - Space

**Date & Time Information**

Start Date Start Time (incl. Setup) End Time (incl. Breakdown)

**Occurrences & Frequency Information (Select either End Date or # Occurrences)**

Daily Frequency End Date # Occurrences

View

K-12 school districts, municipalities and other facility owners with public-use spaces are reducing operating costs, improving community satisfaction, and reducing their carbon footprints with ML Schedules™ software. Learn more or recommend a District.

View button

Frequency menu

# Occurrences menu

### 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



As a recurring event

Daily  
Daily – Weekdays Only  
Weekly  
✓ 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

Make A Recurring Request: Erie Kayaking Team

1. Select Space and Date & Time information.
2. Select the Frequency and then either the # Occurrences or the End Date.
3. Select VIEW to check availability and to make the recurring request.

> Go back to previous screen to select a different request type.

**Space Information**

Site: ML High School      Space: HS Gym

**Date & Time Information**

Start Date: 03/18/2017      Start Time (incl. Setup): 3:30pm      End Time (incl. Breakdown): 5:45pm

**Occurrences & Frequency Information (Select either End Date or # Occurrences)**

Frequency: Weekly      End Date:      # Occurrences: 6

View   Continue

Date	Start Time (incl. Setup)	End Time (incl. Breakdown)	Available
X 3/18/2017	3:30pm	5:45pm	YES
X 3/25/2017	3:30pm	5:45pm	YES
X 4/1/2017	3:30pm	5:45pm	YES
X 4/8/2017	3:30pm	5:45pm	YES
X 4/15/2017	3:30pm	5:45pm	YES
X 4/22/2017	3:30pm	5:45pm	YES

available spaces automatically selected

Available status

## Request Space

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.

( on next page)



### 3-C. Make Recurring Request (cont.)

ML Schedules™ Make Recurring Reservation/Request Spaces screen

Go back to previous screen command

Make a Recurring Request: Erie Kayaking Team

1. Select Space and Date & Time Information.
2. Select the Frequency and then either the # Occurrences or the End Date.
3. Select VIEW to check availability and to make the recurring request.

> Go back to previous screen to select a different request type.

**Space Information**

ML High School Site HS Gym Space

**Date & Time Information**

03/18/2017 Start Date 3:30pm Start Time (incl. Setup) 5:45pm End Time (incl. Breakdown)

**Occurrences & Frequency Information (Select either End Date or # Occurrences)**

Weekly Frequency 6 # Occurrences

View Continue

Date	Start Time (incl. Setup)	End Time (incl. Breakdown)	Available
3/18/2017	3:30pm	5:45pm	YES
3/25/2017	3:30pm	5:45pm	YES
4/1/2017	3:30pm	5:45pm	YES
4/8/2017	3:30pm	5:45pm	YES

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

ML High School  
Site

Erie Kayaking Team  
My Group

Classroom - RM 1  
Space

02/24/2017 06:00 PM  
Setup Start Date / Time

02/24/2017 07:15 PM  
Breakdown End Date / Time

02/24/2017 6:00pm  
Event Start Date / Time

02/24/2017 7:15pm  
Event End Date / Time

\$0.00/ Hour  
Estimated Cost ⓘ

No  
Is this a Fundraising Activity?

Event Name

Notes (Set Up Directions, Other Instructions, etc)

No  
Will Prepared Food Be Sold?

**ADDITIONAL INFORMATION** ⓘ

**EQUIPMENT** ⓘ

**PERSONNEL** ⓘ

**ATTACHMENTS** ⓘ

I have made a request with MasterLibrary CSD before

I have read and agree to the District Terms & Conditions (view)

Request

K-12 school districts, municipalities and other facility owners with public-use spaces are reducing operating costs, improving community satisfaction, and reducing their carbon footprints with ML Schedules™ software. Learn more or recommend a District.

District Terms acceptance

Request button

### Provide Additional Information and Submit Request

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 basic users when searching spaces if your district has enabled this feature.



As a recurring event

## 3-D. Request Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

The screenshot shows the ML Schedules web application interface. At the top, there is a navigation bar with the ML Schedules logo and various menu items like 'K-12 Facility Request Software', 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below the navigation bar, there is a welcome message and a search bar. The search bar has a magnifying glass icon and the word 'search' in a large font. To the right of the search bar, there are four numbered steps: 1. select type, 2. search spaces, 3. request space, and 4. confirm request. Below the search bar, there is a section titled 'Request Multiple Spaces At The Same Time : Erie Kayaking Team'. This section contains a list of instructions for searching for multiple spaces at once. Below the instructions, there are three columns of search criteria: 'Start Date / Time (Incl. Setup)', 'End Date / Time (Incl. Breakdown)', 'View', 'Site', and 'Space Type'. The 'View' button is highlighted with an orange box. Below the search criteria, there is a footer with contact information and a copyright notice.

View button

Start and End Dates and Times

Sites

Space Types

## D. Request Multiple Spaces at Once

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

1 select type 2 search spaces 3 request space 4 confirm request

Request Multiple Spaces At The Same Time : Erie Kayaking Team

1. Select Start and End Dates and Times.
2. Select District to see available Sites and Spaces.
3. Select desired Sites and Spaces. To select multiple: PCs, use Ctrl key; Mac, use Apple key.
4. Select VIEW to check availability
5. Check the Spaces you want to request. Then select CONTINUE to make the requests

> Go back to previous screen to select a different request type.

Start Date / Time (incl. Setup)  
02/14/2017 5:15pm

End Date / Time (incl. Breakdown)  
02/14/2017 7:45pm

View

Site  
ML Elementary School  
ML High School  
ML Middle School

Space Type  
Pool  
Press Box  
Rec Center  
Restrooms  
Room

K-12 school districts, municipalities and other facility owners with public-use spaces are reducing operating costs, improving community satisfaction, and reducing their carbon footprints with ML Schedules™ software. [Learn more](#) or [recommend a District](#).

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View button

multiple spaces selected at same site

### Search for Specific Sites and Spaces at One Site

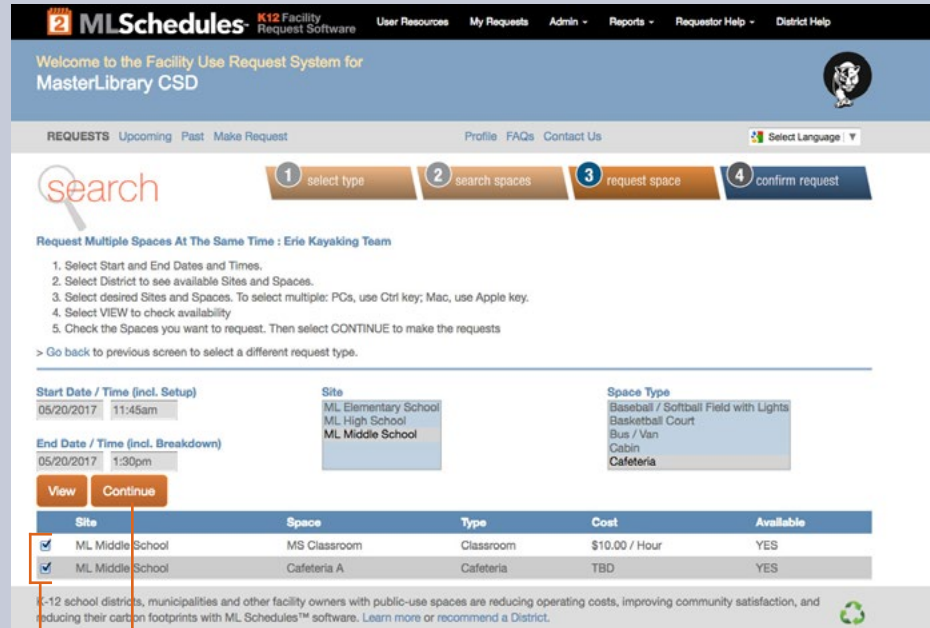
1. Enter a **Start** and **End Date**.
  2. Enter a **Start** and **End Time**.
  3. Select a **Site** from the drop-down menu.
  4. **Optional:** Select the first **Space Type** desired.
  5. Extend your **Space Type** selections by holding the following keys while clicking on additional items:
    - 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



ML Schedules™ K-12 Facility Request Software

Welcome to the Facility Use Request System for MasterLibrary CSD

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

1 select type 2 search spaces 3 request space 4 confirm request

Request Multiple Spaces At The Same Time : Erie Kayaking Team

1. Select Start and End Dates and Times.
2. Select District to see available Sites and Spaces.
3. Select desired Sites and Spaces. To select multiple: PCs, use Ctrl key; Mac, use Apple key.
4. Select VIEW to check availability
5. Check the Spaces you want to request. Then select CONTINUE to make the requests

> Go back to previous screen to select a different request type.

Start Date / Time (incl. Setup) 05/20/2017 11:45am

End Date / Time (incl. Breakdown) 05/20/2017 1:30pm

Site ML Elementary School ML High School ML Middle School

Space Type Baseball / Softball Field with Lights Basketball Court Bus / Van Cabin Cafeteria

View Continue

Site	Space	Type	Cost	Available
<input checked="" type="checkbox"/> ML Middle School	MS Classroom	Classroom	\$10.00 / Hour	YES
<input checked="" type="checkbox"/> ML Middle School	Cafeteria A	Cafeteria	TBD	YES

K-12 school districts, municipalities and other facility owners with public-use spaces are reducing operating costs, improving community satisfaction, and reducing their carbon footprints with ML Schedules™ software. Learn more or recommend a District.

Continue button

selected spaces to request

## Select Spaces and Confirm Requests

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

ML Schedules™ K12 Facility Request Software

Welcome to the Facility Use Request System for MasterLibrary CSD

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

1 select type 2 search spaces 3 request space 4 confirm request

**CONFIRM YOUR MULTIPLE SPACE REQUEST:**

1. Enter a mandatory Event Name and optional Notes.
2. Check the box indicating you have read and agree to the terms of the District.
3. Select REQUEST to complete the reservation request.
4. Note: Any items flagged as unavailable will not be submitted for a reservation request.

> Go back to previous screen

Site	Space	Type	Estimated Cost *	Available
ML Middle School	MS Classroom	Classroom	\$10.00 / Hour	YES
ML Middle School	Cafeteria A	Cafeteria	TBD	YES

\* this is an estimated cost ⓘ

**EVENT INFORMATION**

05/20/2017 11:45am Setup Start Date / Time

05/20/2017 11:45am Event Start Date / Time

Erie Kayaking Team Group

Event Name

05/20/2017 1:30pm Breakdown End Date / Time

05/20/2017 1:30pm Event End Date / Time

- Select Internal School Group - Internal School Group

Notes (Set Up Directions, Other Instructions, etc)

## Provide Additional Information and Submit Request

3. Complete 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

Profile command

Submit button

Add New Group button

Edit Group icon

## 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

**Group Information**  
Please enter all fields for the Group you are managing.

Erie Kayaking Team  
Group Name

(565)444-1234  
Group Phone Number

123 Main Street  
Group Mailing Street Address

Bushnell's Basin  
City

New York  
State

14534  
Zip

**Insurance Information**  
(View Current File)  
Choose File No file chosen

12/31/2016  
Insurance Expiration Date

**Additional Files (enter name and then upload file)**

File 1 Choose File No file chosen

File 2 Choose File No file chosen

File 3 Choose File No file chosen

**District Classifications**  
N/A  
Request Group Classification at a District

Save Group

Note: Your Group can only have 1 Classification per District and not all Districts use Classifications.  
Contact your District for more information.

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.

# Screen Instructions

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

The screenshot shows the ML Schedules software interface. At the top, there is a navigation bar with the ML Schedules logo and various menu items like 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below this is a welcome message for 'MasterLibrary CSD'. A secondary navigation bar includes 'REQUESTS' with sub-links for 'Upcoming', 'Past', and 'Make Request', along with 'Profile', 'FAQs', 'Contact Us', and a 'Select Language' dropdown. The main content area features a 'schedule' logo and a four-step process indicator: 1. select type, 2. search spaces, 3. request space, and 4. confirm request. Below the indicator, there is a 'Make Request : Erie Kayaking Team' section with a list of instructions: 1. Select a Start and End Date and Time. 2. Optionally select District and Space Type(s). To select multiple: PCs, use Ctrl key; Mac, use Apple key. 3. Select VIEW to see available spaces matching your criteria. 4. Select REQUEST on the specific space you'd like to request. A '> Go back to previous screen' link is also present. The form includes input fields for 'Start Date / Time (incl. Setup)' and 'End Date / Time (incl. Breakdown)', a 'Site' dropdown menu, and a 'Space Type' dropdown menu with options: Auditorium, Baseball / Softball Field, Cafeteria, Classroom, and Field. A 'View' button is located to the right of the Space Type dropdown. At the bottom, there is a footer with a message about reducing operating costs and carbon footprints, and a recycling symbol.

online instructions

step-by-step indicator

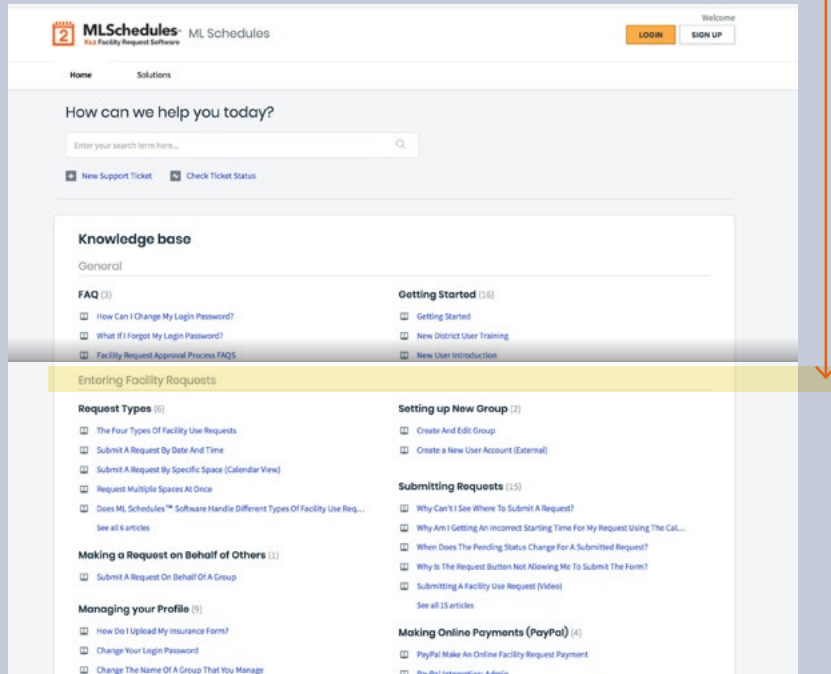
Thanks for using ML Schedules™ Software and we hope you found this *Quick Start Guide* helpful.

Like anything else, the more you use the software, the more comfortable you will be using it.

Remember to follow the step-by-step text instructions and graphics that indicate your place in the process.

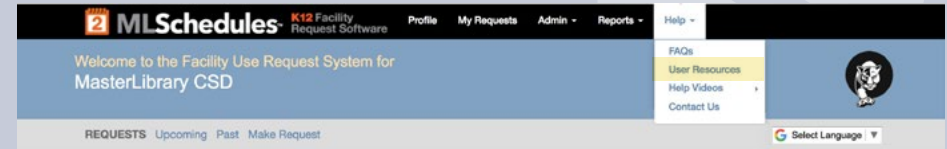
# Online Documentation

scroll down to the *Entering Facility Requests* section



ML Schedules™ Software's online Knowledge Base home page

When you're logged into ML Schedules™ Software, comprehensive online documentation can be accessed from any screen by selecting **Help > User Resources** from the drop-down menu displayed at the top of all pages as shown below.



FAQs (Frequently Asked Questions and answers) appear at the top of the main Help screen. Scroll down to the **Entering Facility Requests** section for detailed step-by-step procedures for using 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.