

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.

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ML Schedules™ Software Commonly Used Icons

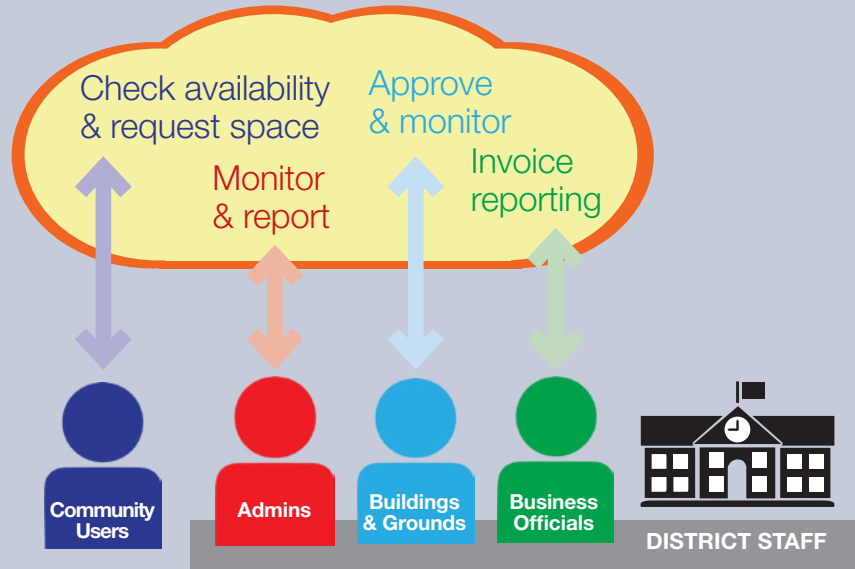
-  **Add/Create** new item (e.g., add Group)
-  **Edit** an existing item (e.g., a User or Group profile)
-  **Help** to open the online Help website
-  **Cancel** procedure or delete selected item

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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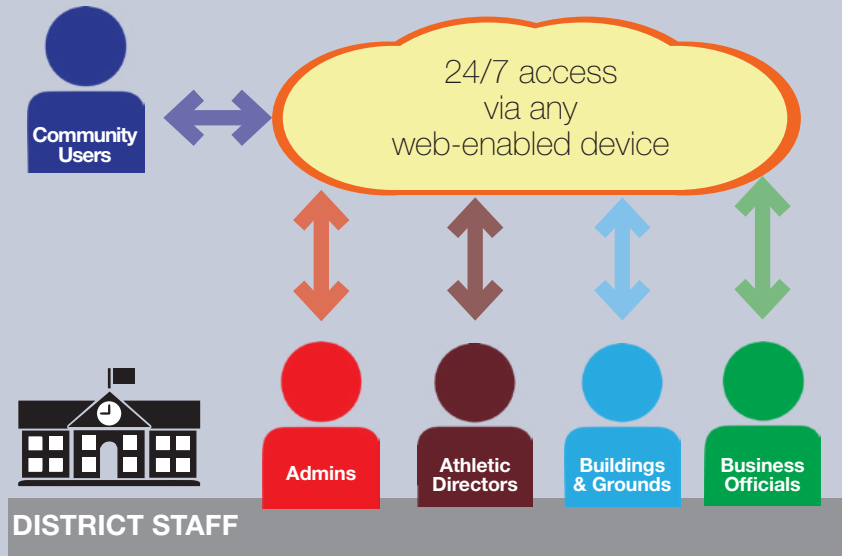
How the software works



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. **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

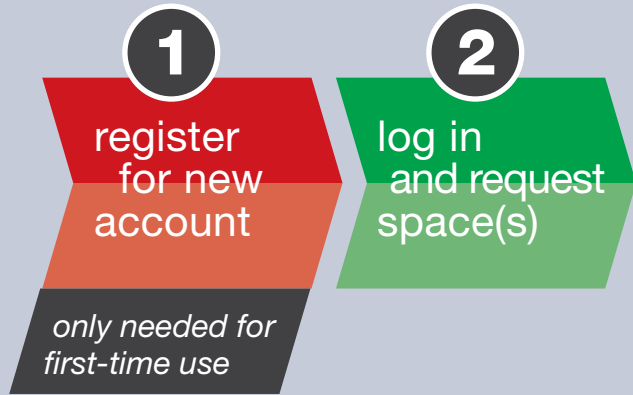


A wide variety of media is usually used by a District to process Community Facility Use Requests including:

- **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

Please enter your email address and password to Log In.

E-mail Address

Password

Log In

Other Options [Create New Account \(video\)](#)
[Send Password Reminder](#)

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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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

Register: Please complete and submit this form to start using the ML Schedules™ software and to create your first group profile.

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

User Information

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

Group Information

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

- Please Select -
Classification

Class Description

Class 1 Classification I – School agencies or related organizations. The following agencies or groups shall be permitted the use of school building at no charge: all MasterLibrary CSD groups and organizations and Community Education programs. Scouts and governmental units are in this classification as long as they are not charging admission or doing a fund raising activity.

Class 2 Classification II – Groups from classification I or youth groups who are charging admission. Senior citizen groups or special classified organizations who are directly working with the school on a particular activity with a benefit to the schools. Other non-profit organizations. Examples of this classification: Church Groups, Little League Football/Hockey/Baseball/Soccer, etc.; Scouts operating a fund raising activity; service club activity benefiting the cancer fund

Class 3 Classification III – Residents using facilities that are in business classifications or private groups but not a part of a service club or school related or youth related program. This section is for non-fund raising type activities such as use of classroom or use of auditorium. These groups and agencies must have 75% of their users residents or employees from the MasterLibrary Central School District. Examples here would be local merchants having an activity days for their employees.

Class 4 Classification IV – This eligible group must also consist of 75% residents or employees in the MasterLibrary CSD, but this particular need for facilities results in the attempt to gain profit from the activity. Example: would be a local service club supporting an activity that has no benefit to the local schools or organization that offers activities to the MasterLibrary residents for personal profit or fund raising.

Class 5 Classification V – This is for all other groups not included in Group Classifications III and IV. An example of this is a state or region wide organization holding a program in our schools. This would not necessarily benefit our local program or community, but is deemed a program with a wider scope.

Submit

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)

1. Register new account (cont.)

ML Schedules™ Register screen

Register: Please complete and submit this form to start using the ML Schedules™ software and to create your first group profile.

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

User Information

First Name Last Name

E-mail Address Confirm E-mail Address

Password Confirm Password

Group Information

Group Name Phone Number

Street / Mailing Address City

State Zip Code

Classification

Class Description

Class 1 Classification I – School agencies or related organizations. The following agencies or groups shall be permitted the use of school building at no charge: all MasterLibrary CSD groups and organizations and Community Education programs. Scouts and governmental units are in this classification as long as they are not charging admission or doing a fund raising activity.

Class 4 Classification II – Groups from classification I or youth groups who are charging admission. Senior citizen groups or special classified organizations who are directly working with the school on a particular activity with a benefit to the schools. Other non-profit organizations. Examples of this type of use would be a local business sponsoring an activity that has no benefit to the school or organization that offers activities to the MasterLibrary residents for personal profit or fund raising.

Class 5 Classification V – This is for all other groups not included in Group Classifications III and IV. An example of this is a state or region wide organization holding a program in our schools. This would not necessarily benefit our local program or community, but is deemed a program with a wider scope.

Submit

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

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.

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

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.

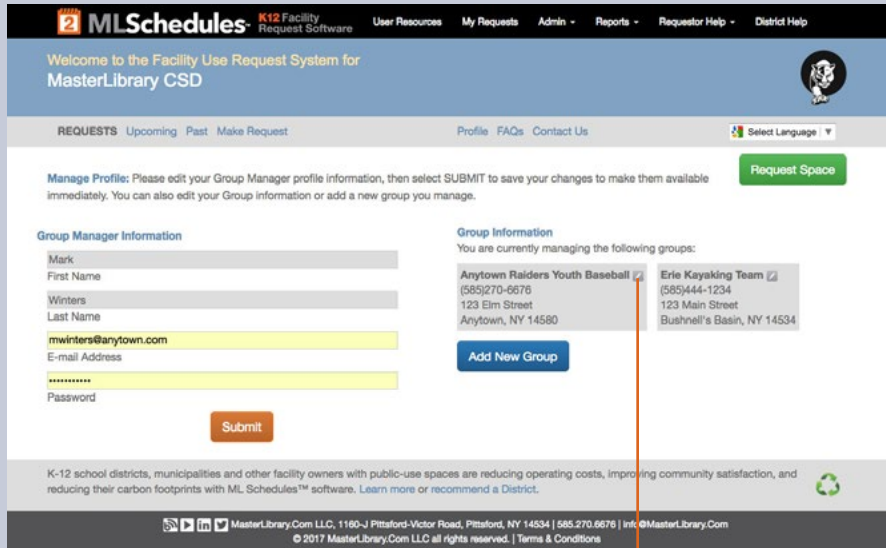
The *Select Reservation Type* screen will be displayed (see next page) where you can start the process of submitting a Facility Use Request for district spaces.

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 divided into two sections: 'Group Manager Information' and 'Group Information'. The 'Group Manager Information' section contains form fields for 'Mark', 'First Name', 'Winters', 'Last Name', 'E-mail Address', and 'Password', along with a 'Submit' button. The 'Group Information' section displays a list of groups currently managed by the user, including 'Anytown Raiders Youth Baseball' and 'Erie Kayaking Team'. Each group entry includes contact information and an 'Edit' icon (a pencil in a square). A red line points from the 'Edit' icon for the 'Anytown Raiders Youth Baseball' group to the caption below.

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. It has several sections: 'Group Information' with fields for Group Name, Group Phone Number, Group Mailing Street Address, City, State, and Zip; 'Insurance Information' with a 'Choose File' button and an 'Insurance Expiration Date' field; 'Additional Files (enter name and then upload file)' with three 'Choose File' buttons; and 'District Classifications' with a 'Request Group Classification at a District' button and a 'Save Group' button. Orange lines connect text labels to specific elements: 'Upload Insurance Certification file' points to the 'Choose File' button in the Insurance Information section; 'Set Insurance Expiration Date' points to the date field; and 'Save Group button' points to the 'Save Group' button.

Upload Insurance Certification file


Set Insurance Expiration Date

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

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

INSTRUCTIONS: Select a Request Type, below, for the Group selected here.

- Select Group - - Select Internal School Group -

By specific date and time By specific space (calendar view) As a recurring event Multiple spaces at the same time

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

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

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

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

Site
ML High School

Space Type
Auditorium
Baseball / Softball Field
Cafeteria
Classroom
Field

View

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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

schedule

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)

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

ML Schedules™ Confirm Request screen

REQUESTS Upcoming Past Make Request Profile FAQs Contact Us Select Language

schedule

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

Confirm Your 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 the REQUEST button to submit the form for approval.

> Go back to previous screen

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 8:00pm Event Start Date / Time
02/24/2017 7:15pm Event End Date / Time
\$0.00 Hour
Estimated Cost
No Is this a Fundraising Activity?

Elite Kayaking Team My Group
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.

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:

- Event Information** (see pg. 15)
- Additional Information** (see pg. 15)
- Equipment** (see pg. 17)
- Personnel** (see pg. 18)
- Attachments** (see pg. 19)

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

(continued on next page)



By specific date and time

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 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

ADDITIONAL INFORMATION

Children Attending # Adults Attending # Chaperones Attending

\$ _____ \$ _____

Adult Admission Fee Child Admission Fee

Number of People Admission Charge / Use of Fee

No Sponsoring Organization

Outside Company / Vendor

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.

- 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.



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

Equipment section of the Confirm Request screen

EQUIPMENT	
No [dropdown] [text area] Podium / Notes	No [dropdown] [text area] Microphone / Notes
No [dropdown] [text area] Screen / Notes	No [dropdown] [text area] Projector / Notes
No [dropdown] [text area] Scoreboard / Notes	No [dropdown] [text area] Light/Sound Board / Notes
No [dropdown] [text area] Access to Water / Notes	No [dropdown] [text area] Access to Electric / Notes
[text area] Air Conditioning	[text area] # of Tables / Notes
[text area] # of Chairs / Notes	[text area] # of Golf Carts / Notes
[text area] Other Equipment Needed	[text area] 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 [v] []	No [v] []
Parking Lot Attendant / Notes	Security / Notes
No [v] []	No [v] []
Custodial / Notes	Scoreboard Operator / Notes
No [v] []	No [v] []
Food Service / Notes	Snow Removal / Notes
No [v] []	No [v] []
IT Support / Notes	AV Support / Notes
No [v] []	No [v] []
Lifeguard / Notes	Chaperone / Notes
No [v] []	No [v] []
Event Administrator / Notes	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.

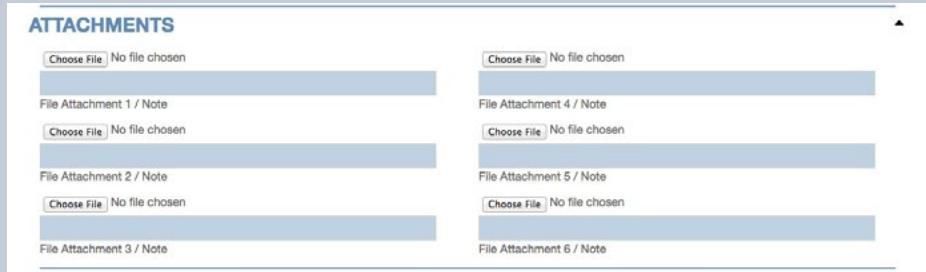
(continued on next page)



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

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

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 : Anytown Raiders Youth Baseball

There are two options for searching for the availability of a specific district 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.

1. Select the fields in Option 1 or 2 below.

2. Select the Search button to display the availability of the desired space. If a calendar date is blank, the desired space should be available for that date.

3. Single click the desired date to display an hourly view of the date.

4. Single click on the desired starting time (including setup) if no events are scheduled.

> Go back to previous screen

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

OR

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

Search

< > today February 2017 month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	29	30	31	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	1	2	3
4	5	6	7	8	9	10

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.



By specific space
(calendar view)

(continued on next page)

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

ML Schedules™ Make Reservation Daily Calendar View

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 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below the navigation bar, there is a welcome message: 'Welcome to the Facility Use Request System for MasterLibrary CSD'. The main content area features a 'REQUESTS' section with tabs for 'Upcoming', 'Past', and 'Make Request'. A progress bar indicates four steps: 1. select type, 2. search spaces, 3. request space, and 4. confirm request. The current step is 'request space', which is highlighted. Below the progress bar, there is a 'Make Request : Anytown Raiders Youth Baseball' section with instructions: 1. Select a specific Space. 2. Optionally select Space Type, District and Site to limit your Spaces. 3. Single Click the day you want and then again on the specific starting time if there are no events there already. Below the instructions, there is a search bar with dropdown menus for 'Select Type' (set to 'ML High School') and 'HS Gym', and a 'Search' button. Below the search bar, there is a calendar view for 'February 3, 2017' (Friday). The calendar shows a grid of time slots from 'all-day' to '5am'. A vertical orange line is positioned at the 5am slot on Friday, indicating the selected event's starting time.

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 - 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

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) 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 0 # 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:

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

Or:

- 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

- 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

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

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
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.



(continued 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
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

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

02/24/201 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)

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 community 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 'User Resources', 'My Requests', 'Admin', 'Reports', 'Requestor Help', and 'District Help'. Below the navigation bar, a welcome message reads 'Welcome to the Facility Use Request System for MasterLibrary CSD'. A secondary navigation bar contains '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 search bar and a progress indicator with four steps: 1. select type, 2. search spaces, 3. request space, and 4. confirm request. Below this, a section titled 'Request Multiple Spaces At The Same Time : Erie Kayaking Team' provides instructions: 1. Select Start and End Dates and Times. 2. Narrow your search by selecting a Site and/or a Space. To select multiple settings: • PCs, use the Ctrl key to extend your selection • Macs, use the Apple key. 3. Select the View button when all desired selections have been made to check availability. 4. Select the checkboxes next to the available spaces you want to request. 5. Select the Continue button to confirm your request and add information prior to submitting. A note below the instructions says '> Go back to previous screen to select a different request type.' The search form includes three columns: 'Start Date / Time (incl. Setup)' and 'End Date / Time (incl. Breakdown)' with calendar pickers and a 'View' button; 'Site' with a list of options (ML Elementary School, ML High School, ML Middle School); and 'Space Type' with a list of options (Arena, Auditorium, Baseball / Softball Field, Baseball / Softball field with Lights, Basketball Court). A footer contains contact information for MasterLibraryCom LLC and copyright notice for 2017.

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 Multiple 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

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

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

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

1-12 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

The screenshot shows the 'Manage Profile' page. At the top, a navigation bar includes 'Profile' and 'FAQs'. A 'Profile command' label points to the 'Profile' link. The main content area is divided into two sections: 'Group Manager Information' and 'Group Information'. The 'Group Manager Information' section contains fields for Mark, First Name (Winters), Last Name, E-mail Address (mwinters@anytown.com), and Password, with a 'Submit' button below. The 'Group Information' section shows a list of groups: 'Anytown Raiders Youth Baseball' and 'Erie Kayaking Team', with an 'Add New Group' button below. An 'Edit Group icon' label points to the edit icon next to the 'Erie Kayaking Team' group. A 'Request Space' button is visible in the top right of the main content area.

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.

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.