MasterLibrary™ **ML Schedules™**
Community Facility Use Request Software

Community User Quick Start Guide

Hi community member, and welcome to MasterLibrary™ Software. Our ML Schedules™ software is easy to use with online instructions that guide you through the process of setting up an account and reserving spaces with your participating school district.
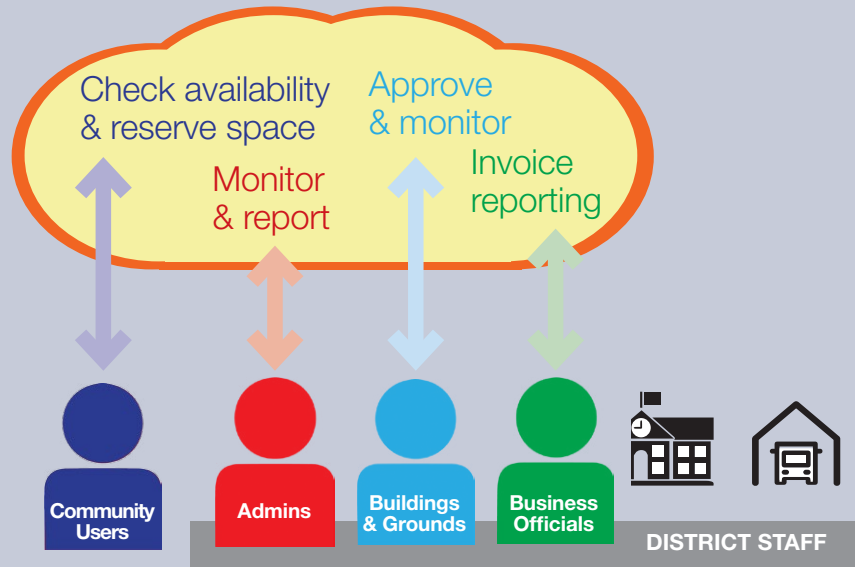
For those users who want additional guidance, this *Quick Start Guide* provides a brief overview of the reservation process as well as step-by-step instructions for account setup and reserving spaces by various type.

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 district's carbon footprint.

MASTERLIBRARY™
Construction and Facilities Software

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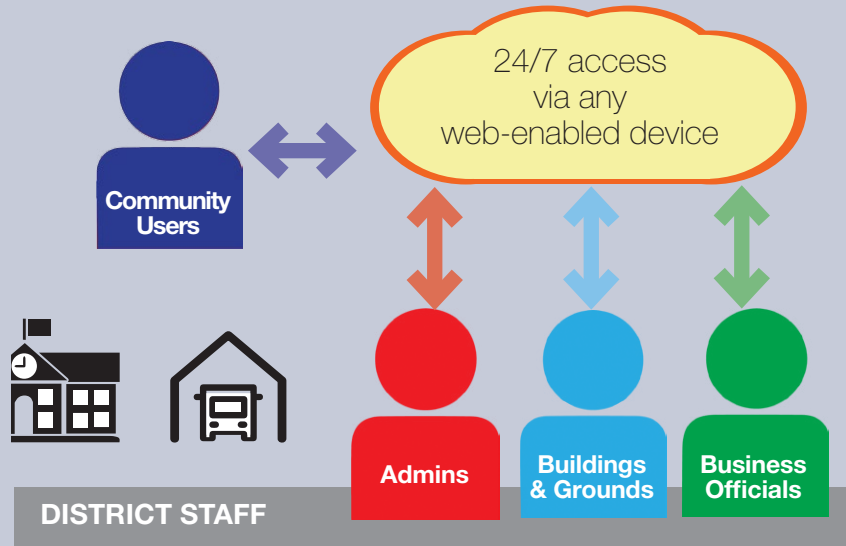
ML Schedules™ software moves the process you use to reserve facility space from your school district's office to **"the cloud"** which brings many benefits to you:

- **Saves time** with ability to search and reserve 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

Community Users

24/7 access via any web-enabled device

Admins

Buildings & Grounds

Business Officials

DISTRICT STAFF

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. **School Buildings and Grounds staff** responsible for the maintenance of District spaces
4. **School Business Officials** who need to approve all Facility Use Requests and who also manage invoices and payments for reserved spaces.

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

Printed Forms

Spreadsheets

Phone Calls

Emails

Ledgers

Logbooks

Snail mail

Signatures

A wide variety of media are 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.

MasterLibrary. Construction and Facilities Software   *ML Schedules™ Software Community User Quick Start Guide*

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First-Time Overview

1 register for new account

only needed for first-time use

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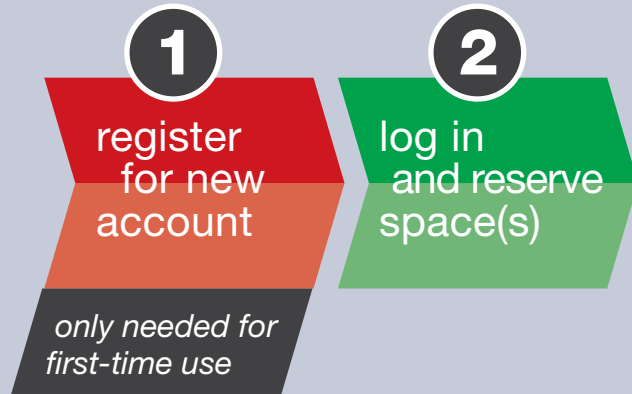
The first time you use ML Schedules™ software, you will need to register for a new User account with a Group Name (e.g., for a youth sports team or Girl Scout troop).

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 ML Schedules™ software using your e-mail address and password to search for and reserve your space(s).

1. Register new account

ML Schedules web home page **Create Account**
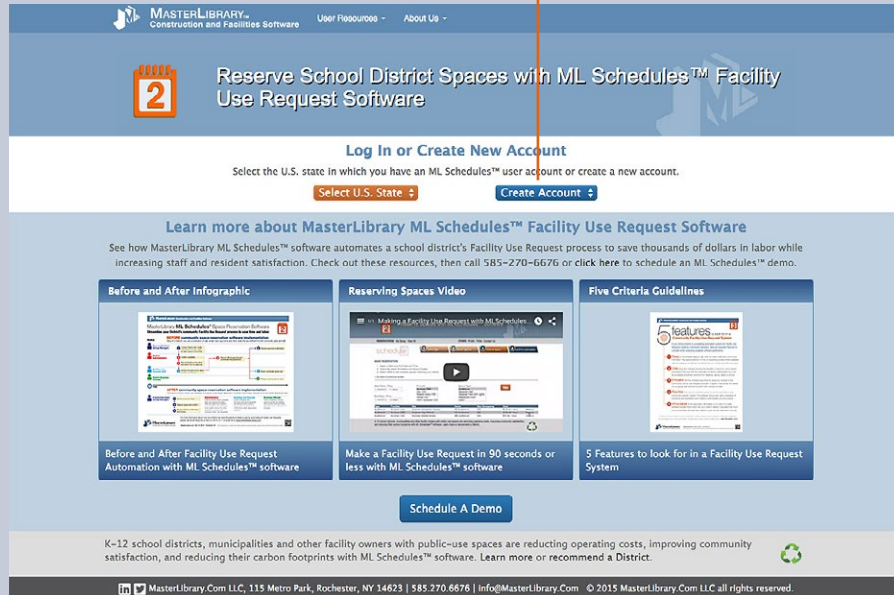
Access the ML Schedules™ software online

From any web browser connected to the internet:

1. Go to www.MLSchedules.com.

2. Select the **Create Account** drop-down menu from the home page: then select the U.S. state in which your school district is located (e.g., New York).

A Register screen will be displayed (see next page) where you can enter information about yourself and the Group you represent.

Note: ML Schedules™ software operates using state-specific websites. Once your account is set up, you may want to bookmark the URL for your state's log-in page in your web browser.

1. Register new account (cont.)

ML Schedules™ Register screen

Submit button

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
   - Your Default Provider (i.e., the school district to automatically associate with your account)

   Group Information
   - Your Group's Name
   - A phone number with Area Code in specified format
   - Street mailing address including ZIP Code

When all the data is entered:

4. Select the **Submit** button.

   An email message confirming your registration will be sent to the email address entered in the Register screen. Keep this message for your records.

2. Log in

Log In command

Log In button   **U.S. State indicator strip**

Log into ML Schedules™ software

You can now start making space reservations using the software. From any ML Schedules™ website screen:

1. Select **Log In** command at the upper right of the screen.

   The ML Schedules™ Log-in screen will be displayed.

2. Enter your email address and password, then select the **Log In** button.

   Note the U.S. State indicator strip on the log in page: be sure you are in the correct ML Schedules™ state website when you log into your account.

   The Select Reservation Type screen will be displayed (see next page) where you can start the process of searching for and reserving District spaces.

3. Reserve spaces

ML Schedules™ Select Reservation Type screen

progress graphic   Group drop-down menu

see pg. 11   see pg. 15   see pg. 17   see pg. 21
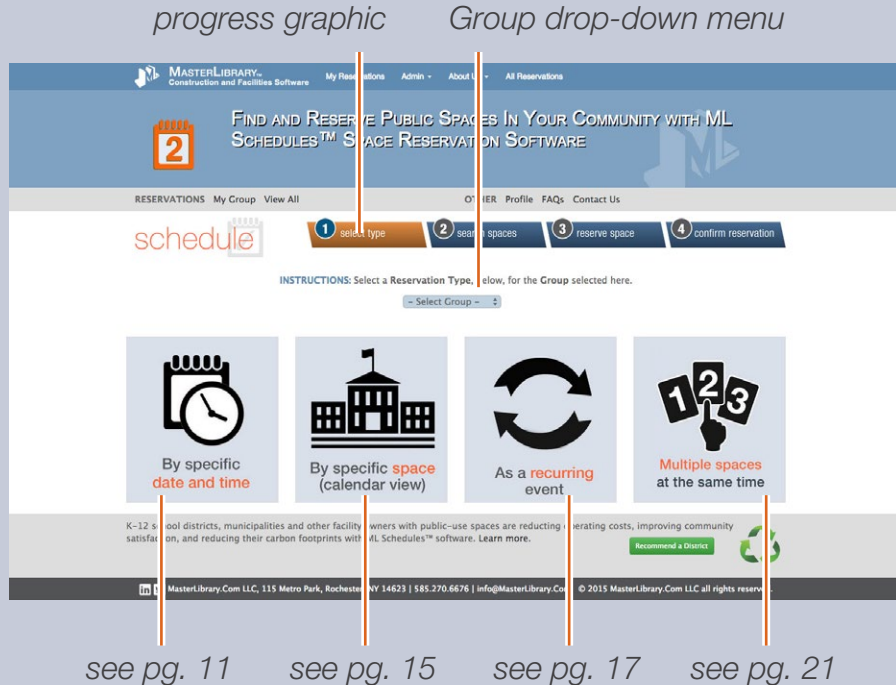
You can make four different types of Facility Use Requests using ML Schedules™ software:

A. By specific time and date *(see pg. 11)*
B. By a specific space (calendar view) *(see pg. 15)*
C. As a recurring event in the same space *(see pg. 17)*
D. Multiple spaces at the same time (e.g., gym, locker rooms and concession area) *(see pg. 21)*

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 Reservation Type

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

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

ML Schedules™ Search Spaces screen

View button

A. Reserve by Specific Date and Time

All reservation types require three basic steps:

1. Search spaces by date(s) for availability
2. Reserve the available space(s)
3. Confirm your reservation information

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 30 minute intervals.

4. Select the desired space **Provider** (e.g., School District)

3-A. Reserve by Date and Time (cont.)

ML Schedules™ Search Spaces screen with available spaces shown

available spaces

Reserve command

5. Select a **Space Type.**

Note: You can select multiple Providers and/or Space Types by holding the following keys while selecting additional menu items:
- PC: Ctrl key   • Mac: Apple key

6. 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 one or more of the field settings to find available spaces.

Reserve the Desired Space

7. Select the **Reserve** command on the same line as the desired space, noting its maximum occupancy and hourly rate.

3-A. Reserve by Date and Time (cont.)

ML Schedules™ Confirm Reservation screen

Provider Terms acceptance   Reserve command

Confirm Reservation

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

Multiple Group Managers: Check that the correct **Group** is displayed for the event. (You can change this setting from the **Group** drop-down menu.)

Other fields are also available to provide more information about the Facility Use 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.** Visible to general public.
- **Automated Electronic Defibrillator (AED) Certified Person In Charge** and certification **Expiration Date.**

3-A. Reserve by Date and Time (cont.)

ML Schedules™ Confirm Reservation screen

Provider Terms acceptance   Reserve command

8. Complete all fields in the **Confirm Reservation** screen including Event Name and Notes (optional), and event AED person as well as certification expiration date.

9. Select the check box signifying you have read and agree to Provider terms.

Note: Provider Terms are available from the District's website.

10. Select the **Reserve button** to complete the Facility Use Request.

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.

3-B. Reserve by Specific Space

ML Schedules™ Make Reservation Calendar View, Month screen

space and site drop-down menus

B. Reserve by a Specific Space (Calendar View)

All reservation types require three basic steps:

1. Search spaces by date(s) for availability
2. Reserve the available space(s)
3. Confirm your reservation information

Search Spaces

From the Make Reservation Calendar View screen:

1. Select a **Provider, Type, Site** and **Space** from the drop-down menu selections.

   If the selected space is already reserved (or pending approval), the event name will appear on the calendar.

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

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

(continued on next page)

3-B. Reserve by Specific Space (cont.)

ML Schedules™ Make Reservation Daily Calendar View

Reserve Space

3. Click on the desired **Start Time.**
   The **Confirm Reservation** screen will be displayed as described on pages 13 – 14 of this Guide.

Confirm Reservation

4. Perform steps 8 – 10 on page 14 to complete the Facility Use Request.

ML Schedules™ Make Recurring Reservation screen

Monthly Calendar View to select Start Date

C. Make a Recurring Reservation

All reservation types require three basic steps:

1. Search spaces by date(s) for availability
2. Reserve the available space(s)
3. Confirm your reservation information

Search Spaces

From the Make Recurring Reservation screen:

1. Select a **Provider, Site** and **Space** from the drop-down menu selections.
2. Click on the desired **Start Date.**

   A **Monthly Calendar** will be displayed from which a Start Date can be selected.
3. Select a **Start Time** and **End Time** in 30-minute increments from the drop-down menus.

(continued on next page)

3-C. Make Recurring Reservation (cont.)

ML Schedules™ Make Recurring Reservation screen

Occurrences
drop-down menu

Frequency
drop-down menu

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

5. Select the event **Frequency** from the drop-down menu:
   - Daily (Mon. - Sun.)
   - Daily – Weekday Only (Mon. – Fri.)
   - Weekly (on same day of week)

6. 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)
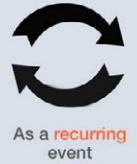
3-C. Make Recurring Reservation (cont.)

ML Schedules™ Make Recurring Reservation/Reserve Spaces screen

available spaces

Reserve Space

If the desired space is available for the selected start date, times and frequency, it will show a **Yes** status in the **Available** column. In the sample screen at left, the Elementary School's Soccer Field is available from 12 – 1 p.m. on 5 consecutive Mondays starting Oct. 19.

7. Select the **Continue** button to confirm the recurring reservation.

Notes: To search spaces using different parameters, enter new field data and select the **View button.** To select a different Reservation 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 sending the request.

3-C. Make Recurring Reservation (cont.)

ML Schedules™ Confirm Recurring Reservations screen

Confirm Reservation

The Confirm Recurring Reservation screen includes the selected spaces, dates and times, as well as the fields described on pages 12 – 13.

8. Complete all fields in the **Confirm Reservation** screen including Event Name and (optional) Notes, and AED event person and certification expiration date.

9. Select the check box signifying you have read and agree to Provider terms (available from its website).

Multiple Group Managers: Check that the correct **Group** is displayed for the event. (You can change this setting from the **Group** drop-down menu.)

10. Select the **Reserve button** to complete the Request. A thank-you screen will be displayed.

Note that the requested space will now appear as **Pending Approval** to other community users when searching spaces.

3-D. Reserve Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

Start and End Dates

Provider

View button

Start and End Times

D. Reserve Multiple Spaces at Once

This procedure allows you to search for and select multiple sites and spaces based on specific dates and times. There are a few ways you can search for spaces using this reservation type:
- Any site or space from one provider (pg. 21)
- Specific sites and/or spaces from one provider (pg. 22)
- Any site and space from any providers (pg. 23)

Search All Sites and Spaces from one Provider
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 a **Provider** from the drop-down menu.
4. Select the **View** button to see what sites and spaces are available from the selected Provider for the specified dates and times.

3-D. Reserve Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

multiple spaces
selected at same site

View button

Search for Specific Sites and Spaces from One Provider and/or at One Site

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 a **Provider** from the drop-down menu.
4. Select a **Site** from the drop-down menu if all spaces will be at the same site. Otherwise leave it blank.
5. Select the first **Space Type** you want.
6. Extend your **Space Type** selections by holding the following keys while clicking on additional items:
   - PC: Ctrl key   • Mac: Apple key
7. Select the **View** button to see if the selected spaces are available for the desired date(s) and times.

3-D. Reserve Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

Start and
End Dates

Start and End Times

View button

Search All Sites and Spaces from Any Provider

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 all sites and spaces available from any Provider for the specified dates and times.

Go to page 24 to complete this procedure.

3-D. Reserve Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

selected spaces to reserve

Select Spaces and Confirm Reservations

To complete Multiple Reservations:

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

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

A Confirm Multiple Reservations screen will be displayed similar to the one shown for Recurring Reservations on page 20 except it will list the multiple spaces you reserved (see next page).

3-D. Reserve Multiples Spaces at Once

ML Schedules™ Search Multiple Spaces screen

Select Spaces and Confirm (cont.)

3. Complete all fields in the **Confirm Reservation** screen including Event Name and (optional) Notes, and AED event person and certification expiration date.

4. Select the check box signifying you have read and agree to Provider terms (available from the District's website).

Multiple Group Managers: Check that the correct **Group** is displayed for the event. (You can change this setting from the **Group** drop-down menu.)
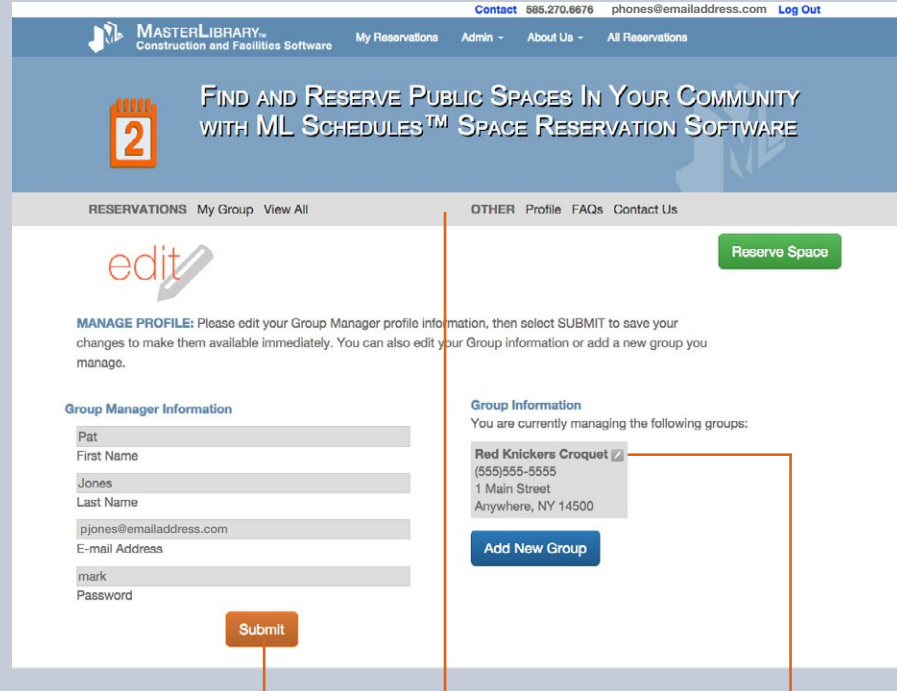
5. Select the **Reserve button** to complete the Request.

A thank-you screen will be displayed.

Note that the requested space will now appear as **Pending Approval** to other community users when searching spaces.

Editing Profiles & Adding Groups

ML Schedules™ User Profile screen

Submit toolbar Edit Group icon

To Edit Group Manager (User) information

1. Select *Profile* from the gray toolbar.

   The Edit User Profile screen will be displayed.

To edit Group Manager (User) information

2. Select and enter the new data in the desired fields.

3. Select the **Submit** button.

   The updated information will be displayed.

To edit Group information

1. Select the edit (pencil) 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 **Submit** button.

   The User Profile screen will display the updated data.

Editing Profiles & Adding Groups (cont.)

ML Schedules™ User Profile screen

Add New Group   Reserve Space

To add a New Group

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

   An Add New Group window will be displayed.

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.

To make a new Facility Use Request:

1. Select the **Reserve Space** button.

   The Select Reservation Type screen will be displayed. See page 10 for instructions.

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.
- MasterLibrary's <u>Resources</u> page for case studies, best practice tip sheets and more.
- MasterLibrary's <u>blog site</u> with articles about new features, new customers, and other items of interest.
- ML Schedules™ User e-newsletter

If you have a suggestion on how to improve the usability of ML Schedules™ software or this *Quick Start Guide,* please send an email or call **1-585-270-6676.**

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