



# 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.


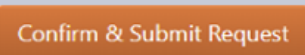
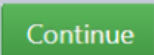

We're sure you'll find ML Schedules™ Software both easy to use and beneficial in terms of saving time and energy...not to mention reducing your school district's carbon footprint.

# Contents

## ML Schedules™ Software Commonly Used Icons

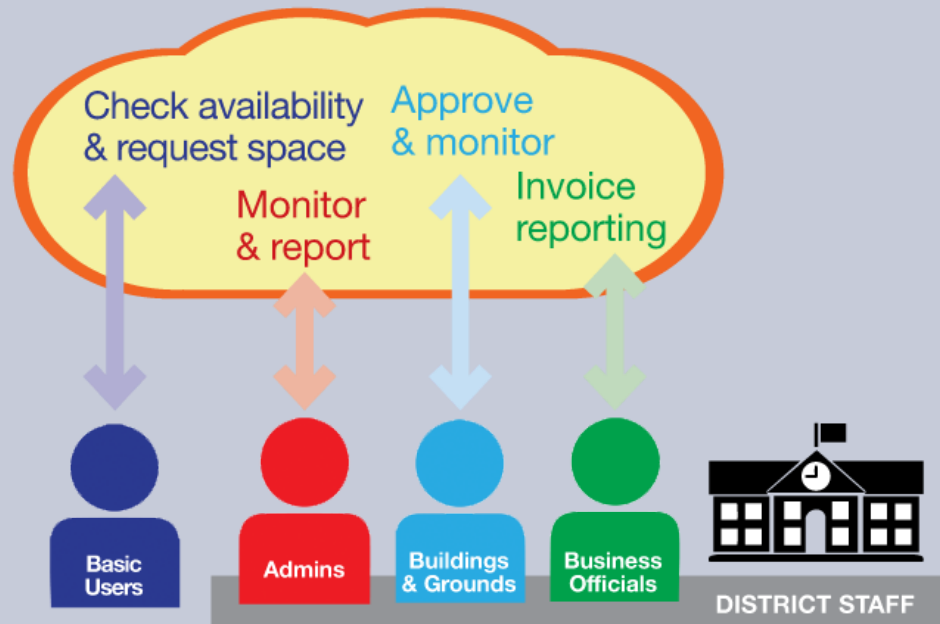
-  **Add/Create** new item (e.g., add Group)
-  **Edit** an existing item (e.g., a User or Group profile)
-  **Help** to open the online Help website
-  **Cancel** procedure or delete selected item

## ML Schedules™ Software Commonly Used Buttons

-  **View Availability** to verify that a space(s) is available to request based on the criteria entered.
-  **Confirm & Submit Request** 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

- How the application works . . . . . 3
  - People in the process . . . . . 4
  - Supporting media . . . . . 5
- First-time overview . . . . . 6
  - 1. Register new account . . . . . 7
  - 2. Log in . . . . . 10
    - Add Group Insurance Information . . . . . 11
  - 3. Submit Facility Requests . . . . . 13
    - Three ways to request a facility. . . . . 13
    - Accessing the *Make A Request* screen. . . . . 14
    - Make a New Request . . . . . 15
    - Provide Additional Information . . . . . 21
    - Submit Request . . . . . 11
- Edit a User Profile and Add Groups . . . . . 23
- Edit Group Information . . . . . 24
- Online Documentation . . . . . 25

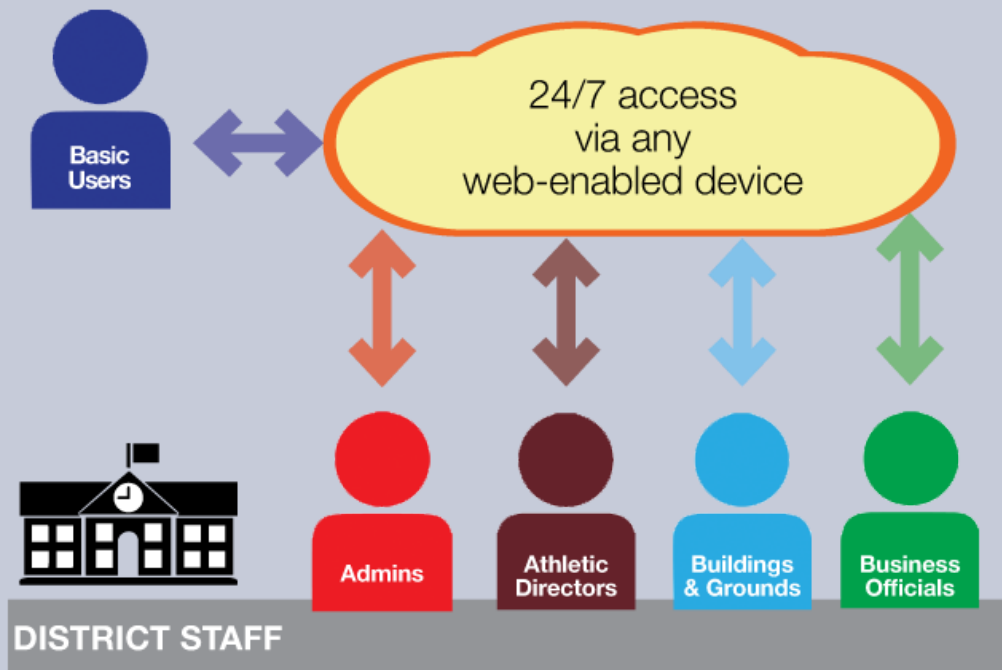
# How the application works



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

- **Basic users** including school district staff and community members who submit Facility Requests.
- **School administrators** responsible for managing the Facility Request process.
- **Athletic Directors (ADs)** and their staff responsible for managing Facility Requests for athletic fields and spaces.
- **School Buildings and Grounds staff** responsible for the maintenance of District spaces
- **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



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).

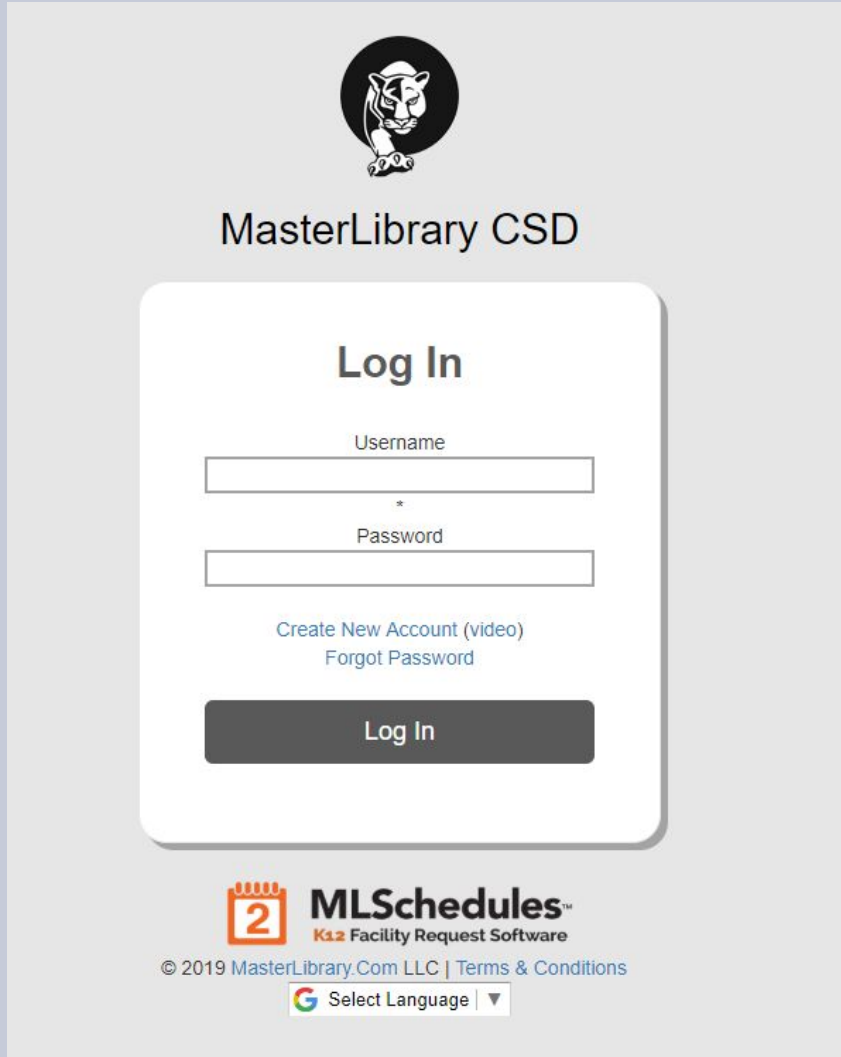
You can also create multiple Group Names under one user account. Adding new Groups is described in the Log In procedure.

This Account setup step is only necessary the first time you use the software. After that, you will be able to log into your district's ML Schedules™ software account using your email 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



MasterLibrary CSD

**Log In**

Username


\*

Password


[Create New Account \(video\)](#)

[Forgot Password](#)

**Log In**

 **ML Schedules™**  
K-12 Facility Request Software

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 Select Language ▼

### Access the ML Schedules™ application 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.  
E.g.: **http://www.ny9.mlschedules.com.**


An ML Schedules™ 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.

1. Register new account (cont.)



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

Phone Number

E-mail Address

Password

Confirm E-mail Address

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

- Please Select -

State

Zip Code

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

(continued on next page)

# 1. Register new account (cont.)

ADDITIONAL GROUP INFORMATION.

Classification

- Please Select -

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.
Government Agencies	All Government Agencies
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: Upload the Group's Certificate of Insurance and its Expiration Date.

Choose File

No file chosen

Expiration Date

Additional Group 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

☐ I'm not a robot

  
reCAPTCHA  
Privacy · Terms

Create User Account

## Enter User and Group information (cont.) Additional Group Information

Request a group Classification from the drop-down menu. If you will be submitting requests on behalf of an **non-district group** (e.g., 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 (PDF or JPG), and;
- Enter the insurance **Expiration Date**.

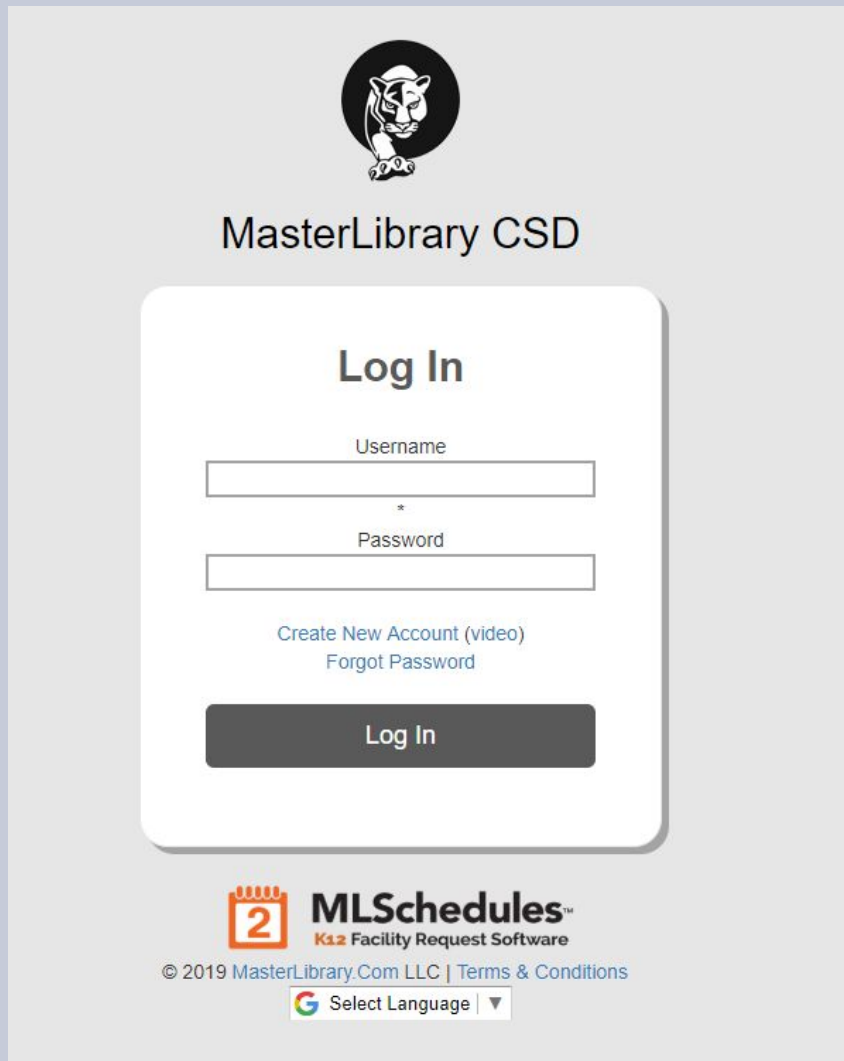
**Note:** If the Classification you have chosen requires insurance, you will need to upload insurance before selecting **Create User Account**.

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



The image shows the login interface for MasterLibrary CSD's ML Schedules™ software. At the top is the MasterLibrary CSD logo, which features a stylized tiger head. Below the logo, the text "MasterLibrary CSD" is displayed. The main login area is a white box with rounded corners. Inside this box, the heading "Log In" is centered. Below the heading are two input fields: "Username" and "Password". The "Password" field has a small asterisk icon indicating it is a password field. Below the input fields are two links: "Create New Account (video)" and "Forgot Password". At the bottom of the login box is a dark grey button labeled "Log In". Below the login box, there is a logo for "ML Schedules™ K12 Facility Request Software", which includes a calendar icon with the number 2. At the bottom of the page, there is a copyright notice: "© 2019 MasterLibrary.Com LLC | Terms & Conditions" and a language selection dropdown menu labeled "Select Language".

### 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™ login screen using your district-specific URL. (See page 7 for an example of the URL format.)
2. Enter your **Username** (i.e., email address) and **Password**.
3. Select the **Log In** button.

*(continued on next page)*

# Add Group Insurance Information

User Information

Reset Password

ML

First Name

Admin

Last Name

admin@masterlibrary.com

E-mail Address

Phone Number

0

Email Reminder: This will send a daily email for events scheduled for the following # of days

Calendar

Default Homepage:

Save User Information

Group Information

Add New Group

Group Name	Group Classification	Group Status	
Basketball Team 200	District Groups	Approved	<div>Edit</div> <div>Delete</div>
Jane Doe	District Groups	Approved	<div>Edit</div>
JV Soccer	District Groups	Approved	<div>Edit</div>
Nicole Barley	Non-Profit Groups	Approved	<div>Edit</div>
Nicole Test	District Groups	Approved	<div>Edit</div>
Test notification	District Groups	Pending	<div>Edit</div> <div>Delete</div>
Test123	District Groups	Approved	<div>Edit</div> <div>Delete</div>

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

The Group Information section of the screen lists all the groups for which you have administrator privileges.

To add the required group insurance information:

1. Select the **Edit** button next to the Group name to display a new window with the selected Group’s current information.

(continued on next page)

## Add Group Insurance Information (cont.)

Insurance Information

Choose File

No file chosen

Insurance Expiration Date

Additional Files (enter name and then upload file)

Choose File

No file chosen

File 1

Choose File

No file chosen

File 2

Choose File

No file chosen

File 3

District Classification

MasterLibrary CSD - District Groups

Group Status Approved

Group Managers

Add Group Manager

Name	E-mail	Phone
ML Admin	admin@masterlibrary.com	<div></div>

Group Contacts

Add Contact to Group

Name	E-mail	Phone
------	--------	-------


Save Group

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

**Make A Request:**

Select Group

or

Request on Behalf of

**Site(s)**

- Select Site -

**Space(s)**

- Select Space -

**Frequency**

One Time Event

**Date & Time Information**

Start Date\*

End Date\*

Start Time \*  
(including Setup)

End Time \*  
(including Breakdown)

View Availability

## Three ways to Request a Facility

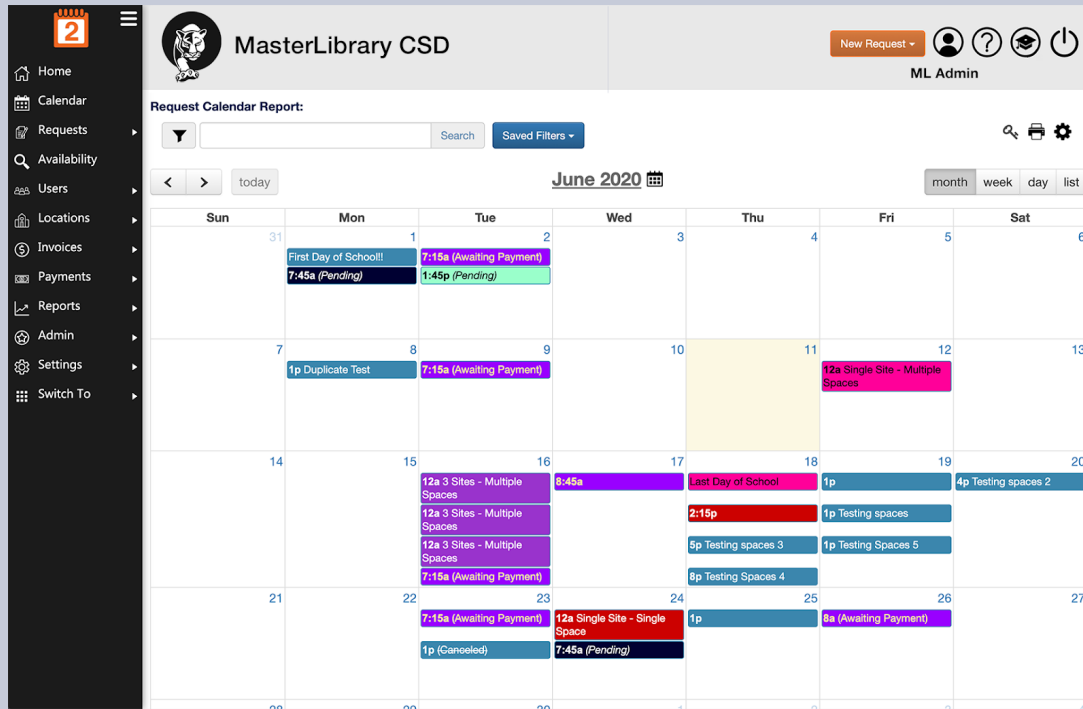
There are three ways to submit a Facility Use Request with the ML Schedules™ application:

- A. By specific time and date.
- B. By a specific space (calendar view).
- C. Multiple spaces at the same time (e.g., gym, locker rooms, and concession area).

Regardless of which way in which you make the request, the same procedure is used from the **Make A Request** screen as shown at left. This screen can be accessed in a number of ways as described on the next page.

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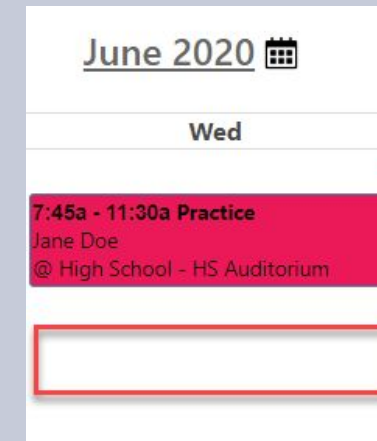
### 3. Submit Facility Requests (cont.)



#### Accessing the *Make A Request* screen

There are a number of ways to access the **Make A Request** from within the ML Schedules™ application:

1. By selecting **Requests > Submit New Request** from the left-panel toolbox on any screen (*below left*).
2. By double clicking an **open day/time slot** on the calendar panel (*below center*) from the default screen (*shown at left*).
3. By selecting **New Request > Add Event** at the top right of the screen on any screen (*below right*).



### 3. Submit Facility Requests (cont.)

The screenshot shows the 'Make A Request' interface in the MasterLibrary CSD system. On the left is a navigation menu with options like Home, Calendar, Requests, Availability, Users, Locations, Invoices, Payments, Reports, Admin, Settings, and Switch To. The main form area has a header with the MasterLibrary CSD logo and a 'New Request' button. Below this, the 'Make A Request' section contains several input fields: 'Request on Behalf of' (with 'Jane Doe' entered), 'Site(s)', 'Space(s)', 'Frequency' (set to 'One Time Event'), and 'Date & Time Information' which includes 'Start Date', 'End Date', 'Start Time (including Setup)', and 'End Time (including Breakdown)'. A 'View Availability' button is located at the bottom of the form. The footer contains copyright information for 2019 MasterLibrary.Com LLC, the ML Schedules logo, and a 'Select Language' dropdown.

### Make a New Request

All request types require three basic steps:

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

To request an available space:

1. Select **New Request > Make New Request** from the upper right of the screen or use one of the other two access methods shown on page 15.

The **Make A Request** screen will be displayed. If you only manage one group, the group name will be displayed in the *Select Group* menu.

*(continued on next page)*

### 3. Submit Facility Requests/Make A New Request (cont.)

**MasterLibrary CSD** ML Admin

**Make A Request:**

or

**Site(s)**

**Space(s)**

**Frequency**

**Date & Time Information**

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**Site(s)**

- 2a. **If managing more than one Group:** Select the desired group from the *Select Group* drop-down menu.
- 2b. **If submitting the Request on behalf of another user:** Select the user from the *Request on Behalf of* menu.
3. Select the location(s) of the space you want to reserve from the **Site(s)** drop-down menu.

**Multiple Selections:** To select multiple options in the **Site(s), Space(s)** and other menus:

- Select your first option. A tag with the selected space name will appear at the top of the menu.
- Select the Site(s) field again to select other options. Each selected site will appear as a tag at the top of the menu as shown at lower left.
- Select the **x** in each tag to delete the selection.

(continued on next page)

### 3. Submit Facility Requests/Make A New Request (cont.)

2

Home

Calendar

Requests

Availability

Users

Locations

Invoices

Payments

Reports

Admin

Settings

Switch To

MasterLibrary CSD

New Request

ML Admin

Make A Request:

Jane Doe

or

Request on Behalf of

Site(s)

Elementary School High School Middle School

Space(s)

ES Cafeteria ES Gym HS Cafeteria HS Gym MS Cafeteria MS Gym

Frequency

One Time Event

Date & Time Information

Start Date\*

End Date\*

Start Time\*

End Time\*

(including Setup)

(including Breakdown)

View Availability

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2 ML Schedules K12 Facility Request Software

Select Language

Frequency

Multiple Days Per Week

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

Frequency

Custom Frequency

June 2020 - July 2020

June							July								
S	M	T	W	T	F	S	S	M	T	W	T	F	S		
23	31	1	2	3	4	5	6	27	28	29	30	1	2	3	4
24	7	8	9	10	11	12	13	28	5	6	7	8	9	10	11
25	14	15	16	17	18	19	20	29	12	13	14	15	16	17	18
26	21	22	23	24	25	26	27	30	19	20	21	22	23	24	25
27	28	29	30	1	2	3	4	31	26	27	28	29	30	31	1
28	5	6	7	8	9	10	11	32	2	3	4	5	6	7	8

4. Select the desired space(s) from the **Space(s)** drop-down menu. Make multiple selections, if desired.
5. Select a request **Frequency** from the drop-down menu. Available options include:

- One Time Event (default)

-Every Other Week

-Daily

-Multiple Days Per Week

-Daily - Weekdays only

-Monthly

-Weekly

-Custom Frequency
- 5a. **Multiple Days Per Week:** Select the desired days for the weekly event (left center).
- 5b. **Custom Frequency:** Select the desired dates from the drop-down calendar (left bottom) selecting as many dates as needed.

(continued on next page)

### 3. Submit Facility Requests/Make A New Request (cont.)

The screenshot shows the 'Make A Request' interface for MasterLibrary CSD. The left sidebar contains navigation links: Home, Calendar, Requests, Availability, Users, Locations, Invoices, Payments, Reports, Admin, Settings, and Switch To. The main form area is titled 'Make A Request:' and includes the following sections:

- Name:** A text input field containing 'Jane Doe' and a dropdown menu for 'Request on Behalf of'.
- Site(s):** A multi-select dropdown menu with options: 'x Elementary School', 'x High School', and 'x Middle School'.
- Space(s):** A multi-select dropdown menu with options: 'x ES Cafeteria', 'x ES Gym', 'x HS Cafeteria', 'x HS Gym', 'x MS Cafeteria', and 'x MS Gym'.
- Frequency:** A dropdown menu currently set to 'One Time Event'.
- Date & Time Information:**
  - Start Date:** 07/15/2020
  - End Date:** 07/15/2020
  - Start Time (including Setup):** 3:30pm
  - End Time (including Breakdown):** 5:15pm

At the bottom of the form is a prominent orange button labeled 'View Availability'. The footer of the page includes copyright information for 2019 MasterLibrary.Com LLC, the ML Schedules K-12 Facility Request Software logo, and a 'Select Language' dropdown.

The application will calculate all other Frequency settings based on the **Starting Date** selected in step 6.

6. Select **Start and End Dates** from the drop-down calendars.

**Note:** If the **Make A Request** screen was accessed from the calendar panel, these fields will be prefilled with the date selected on the calendar.

7. Select **Start and End Times** from the drop-down menus. Be sure to include all setup and breakdown times in these settings.
8. Select the **View Availability** button.

*(continued on next page)*

### 3. Submit Facility Requests/Make A New Request (cont.)

Date & Time Information

07/15/2020

Start Date\*

07/15/2020

End Date\*

3:30pm

Start Time \*

5:15pm

End Time \*

(including Setup)

(including Breakdown)

View Availability

Continue

Space	Date	Start Time (Incl. Setup)	End Time (Incl. Breakdown)	Available
<input checked="" type="checkbox"/> ES Cafeteria	07/15/2020	3:30pm	5:15pm	YES
<input checked="" type="checkbox"/> ES Gym	07/15/2020	3:30pm	5:15pm	YES
<input checked="" type="checkbox"/> MS Cafeteria	07/15/2020	3:30pm	5:15pm	YES
<input checked="" type="checkbox"/> MS Gym	07/15/2020	3:30pm	5:15pm	YES
<input checked="" type="checkbox"/> HS Cafeteria	07/15/2020	3:30pm	5:15pm	YES
<input checked="" type="checkbox"/> HS Gym	07/15/2020	3:30pm	5:15pm	NO

A list of each occurrence showing an **Available** status (YES or NO) for the selected space will be displayed. If the desired space is available for the selected start date, times and frequency, **YES** will be displayed in the **Available** column.

**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.

6. **If you searched for multiple sites/spaces:**  
Select the Delete icon ( ☒ ) for any spaces that you don’t want included on the request.
7. Select the **Continue** button to confirm the request.  
You will now be able to add more event data.

(continued on next page)

### 3. Submit Facility Requests/Make A New Request (cont.)

**MasterLibrary CSD** New Request ML Admin

**Make A Request:**

Jane Doe or Request on Behalf of

**Site(s)**

× Elementary School × High School × Middle School

**Space(s)**

× ES Cafeteria × ES Gym × HS Cafeteria × HS Gym × MS Cafeteria × MS Gym

**Frequency**

One Time Event

**Date & Time Information**

07/15/2020 Start Date\* 07/15/2020 End Date\*

3:30pm Start Time\* (including Setup) 5:15pm End Time\* (including Breakdown)

View Availability Continue

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 different dates and/or Start and End Times.
- The **Available** status will change to **YES** if available.
- Select the available space and proceed to step 6 above.

#### Notes:

- To search using different parameters, enter new field data and select the **View Availability** button.
- You can edit the **Start and End Date and Time** fields before selecting **Continue** to confirm your entries and proceed to the next step of the request process.





(continued on next page)

### 3. Submit Facility Requests (cont.)



MasterLibrary CSD

New Request



ML Admin

CONFIRM YOUR RECURRING REQUEST:

> Go back to previous screen

View Requested Events

EVENT INFORMATION

Event Name\*

Minutes for Setup

Select Event Type

Event Type\*

Minutes for Breakdown

Notes (Set Up Directions, Other Instructions, etc)

ADDITIONAL INFORMATION

Multi Select Dropdown Field

Option 1

Single Select Required

Number of people attending

Rehearsal

Type of Event

Multi-Select

EQUIPMENT

PERSONNEL

No

Parking Lot Attendant / Notes

No

Auditorium Supervisor

No

IT Support / Notes

No

Security / Notes

No

Custodial Staff / Notes

CALENDAR INFORMATION (Optional section to show event details to public calendar. Commonly used for ticketing links, images, and flyers.)

ATTACHMENTS

Choose File

No file chosen

File Attachment 1 / Note

Choose File

No file chosen

File Attachment 4 / Note

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

☐ Send me a Confirmation E-mail

☐ Do not require approval on this request

### Provide Additional Information

After confirming that the requested space(s) meet your needs, a screen will be displayed where you can:

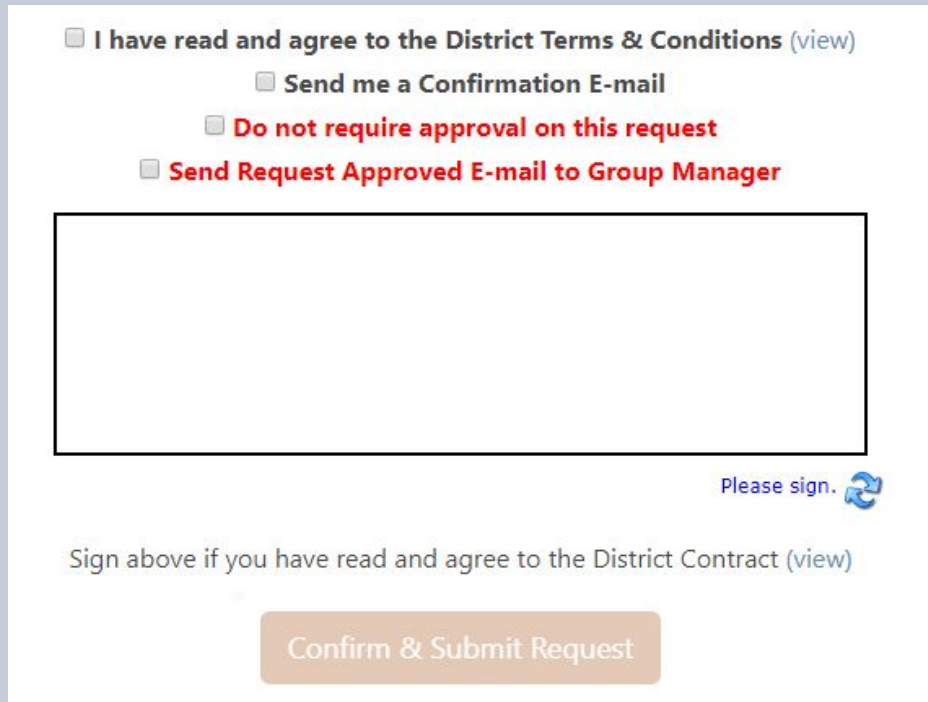
- Provide additional information for the district including how the event should be displayed on its calendar.
- Select required seating, equipment and support staff.
- Upload attachments such as setup drawings, event registration forms, attendee lists, etc.
- Confirm that you agree to all terms and conditions, sign the form, and submit it for processing.

**Note:** Use the arrow buttons to the upper right of each section to view its contents. Available options will vary by district based on local preferences.


8. Complete the **Event Information, Additional Information, Calendar Information, and Attachments** sections as needed.

(continued on next page)

### 3. Submit Facility Requests (cont.)



☐ I have read and agree to the District Terms & Conditions [\(view\)](#)  
☐ Send me a Confirmation E-mail  
☐ Do not require approval on this request  
☐ Send Request Approved E-mail to Group Manager

Please sign. 

Sign above if you have read and agree to the District Contract [\(view\)](#)

Confirm & Submit Request

### Submit Request

Once all desired additional event information has been completed:

9. Select the checkbox 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.

10. Using a mouse (or your finger on a tablet or phone), sign your name in the box.

11. Select the **Confirm & Submit Request** button to submit the Request for review and approval.

A thank-you screen will confirm that your Request is being processed. You will be notified of its progress via email.

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.

# Edit a User Profile and Add Groups

**MasterLibrary CSD** New Request ML Admin

**Manage Profile:**

**User Information** Reset Password

ML:  Admin

First Name:  Last Name:

E-mail Address:  (585) 555-1212

Phone Number:

0

Email Reminder: This will send a daily email for events scheduled for the following # of days

Calendar:

Default Homepage:

Save User Information

**Group Information** Add New Group

Group Name	Group Classification	Group Status
	Class 1	Approved

Edit

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## Edit Group Manager (User) information

1. Select the Profile icon (👤) located at the top right of the screen. The **Manage Profile** screen will be displayed.
2. Select and enter the new data in the desired fields.
3. Select the **Save User Information** 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 **Save Group** button.

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

# Edit Group Information

Basketball Team 200

Group Name

321 Cheer Street

Group Mailing Street Address

New York

State

Choose File

No file chosen

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 Classification

MasterLibrary CSD - District Groups

Group Status Approved

Group Managers

Add Group Manager

Name	E-mail	Phone
ML Admin	admin@masterlibrary.com	

Group Contacts

Add Contact to Group

Name	E-mail	Phone
------	--------	-------

Save Group

Group Phone Number

Canandaigua

City

14424

Zip

Insurance Expiration Date

1. Select the **Edit** button next to the Group name (see previous page) 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.

## Online Documentation

When you're logged into ML Schedules™ Software, comprehensive online documentation can be accessed from any screen by selecting the Help icon ⓘ from the gray header menu displayed at the top of all pages.

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.

## Thanks for using ML Schedules™!

Thanks for trusting your district's facility use requests to ML Schedules™ Software. 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.

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