

# ML Schedules Implementation

## **Step 1: Gather Existing Data from SchoolDude**

(This will take about 2 days for us to gather this information)

The first step will be for MasterLibrary to gain access to SchoolDude and run reports to export the backend data such as Locations, Users/Roles, Approval Processes, Organizations, etc. You will need to set us up with an Administrator account in order for us to run these reports. This data will be entered on a Google Spreadsheet. Once this data is gathered, MasterLibrary will reach out to the district to schedule the first implementation meeting.

Here is a [sample spreadsheet](#) to give you an idea of the data and format that we will be working with during this step.

## **Meeting 1: Review Google Spreadsheet with SchoolDude information**

(We usually plan on about 2 weeks to review this data and make any changes)

During the first implementation call we will review the Google spreadsheet containing your SchoolDude information. We will review your buildings, rooms, fee schedule, approval process, users/roles, classifications, and organizations. Sometimes there is information within SchoolDude that you would like to delete or update. We will make the necessary changes on this spreadsheet before we import this information into ML Schedules. Once your team is satisfied with the information on the spreadsheet, we will import the data into ML Schedules, send your team login credentials and schedule our next meeting.

## **Meeting 2: Setup the Request Form, Blocked Dates, and Review Backend Settings**

(We usually plan on about a week to complete these setup items)

During this session we will review the facilities use request form and make sure that the proper questions are on your form. We will also review the “Additionally Notified Users” that need to be notified when certain equipment or personnel are needed for the events. During this call we will show you how to set up Blocked Dates, for those dates throughout the year that you do not allow requests to be submitted. We will also review the backend settings and how you can adjust any of the information that was imported into the system from the spreadsheet that was originally used.

At this step we will also discuss any integrations that you would like to set up (ScheduleStar Athletics, Revtrak Online Payments, Google Calendars, etc.). After this call we will send your tech team the information that they will need to update your existing Building Rentals webpage. We will provide the links that they will need, videos on how to create an account and submit requests, and a PDF guide for community users as well.

### **Meeting 3: Staff Training (The month before going live)**

We will schedule 3 unique meeting dates/times for the approvers to attend. Approvers will only need to attend one of the 3 time slots available. We will block out an hour for each training session. All training sessions will be recorded and sent to your team after each session as well. This will allow you to share it with other staff members in the future as well.

We will schedule a separate training session for Administrators who need to know how to invoice as well.

This session is a training session for the system Administrators:

- 1) Review Questions
- 2) Review Approving New Community Group Accounts
- 3) Review Submitting a Request through ML Schedules
- 4) Review Approving/Declining/Editing Requests
- 5) Review Invoicing
- 6) Review Reports and Calendar

**Export Existing SchoolDude Events:** We will have a discussion to determine how far back in the past you would like us to go when importing in your existing event information from SchoolDude. We will import your existing events prior to going live with ML Schedules. This is done the day prior to going live with ML Schedules.