TRAINING GUIDE · WARD LEADERSHIP

Ward executive secretary

The executive secretary keeps the bishopric's calendar: interview appointments (including tithing declaration), the Sunday interview sheet, and meeting agendas with their assignments. He sees only the bishopric modules the bishop grants, and can edit the whole ward site like any site editor.

Demo sign-in (Demo accounts → Sign in with email and password):
`execsec@steepl.test` · password `execsec`

What you can do

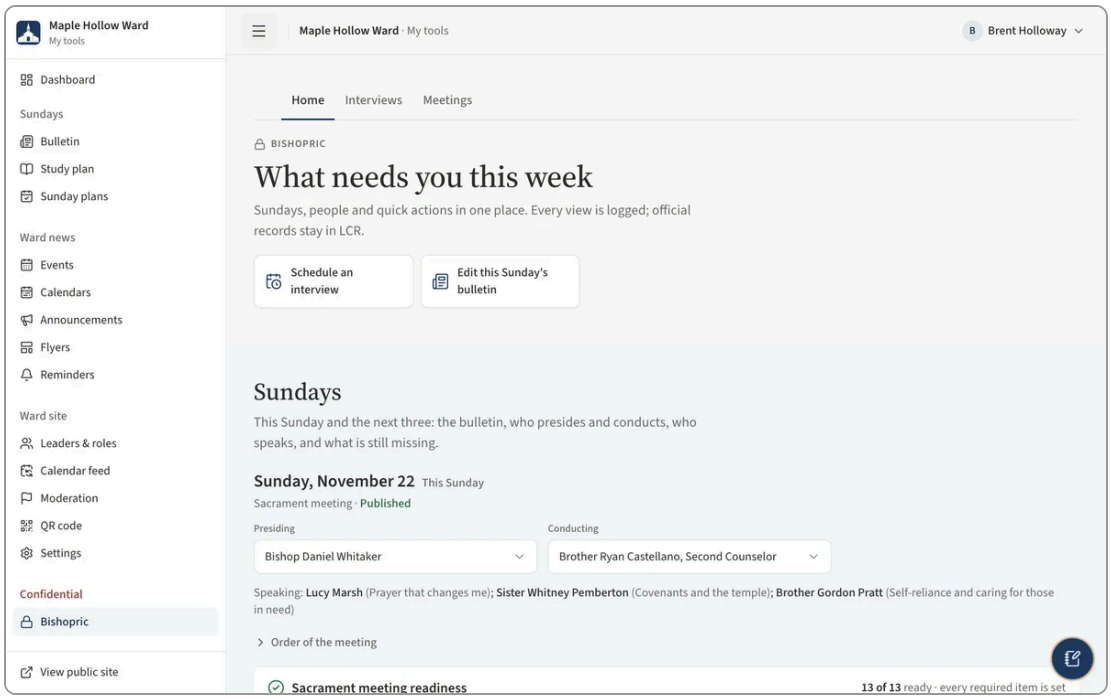
- Schedule interviews in a week or day view and print the Sunday interview sheet
- Add a list of tithing declaration appointments at once with **Add several**
- Create bishopric and council meetings from Handbook templates and track assignments
- Use **Visits** or the **Conducting sheet** only when the bishop grants them
- Edit the bulletin, the calendars, announcements and the rest of the ward site

Before you start

- To sign in, tap **Sign in** at the top right. Choose **Sign in with Google**, or type your e-mail address and choose **Email me a sign-in code**, then type the 6-digit code from the e-mail and choose **Sign in**. Use the e-mail address the ward clerk has for you. Trying the demo: on the sign-in page open **Demo accounts** and choose **Sign in with email and password**. Enter the test account e-mail and its demo password (the start of the e-mail address — see **Demo accounts** on the Instructions page), then choose **Sign in**.
- In the admin sidebar, the **Confidential** group shows **Bishopric** once the bishop has granted you at least one module. Inside, you see **Home** plus your granted tabs (the demo account has **Interviews** and **Meetings**).
- **Needs attention** and **Access & audit** are for the bishop and his counselors only and are never granted.
- General Handbook 38.8.32: confidential Church information — membership status, temporal needs, other non-public personal information — is not stored outside Church-provided systems. Keep notes here to a few words, never record worthiness, tithing or welfare details, and record official information in LCR.

01 Know what your grants show

1. Open **Admin**, then **Bishopric** under **Confidential**.
2. The tabs show only the modules the bishop has granted you; the line at the bottom of each page says the area is visible to you for those modules.
3. **Home** (**What needs you this week**) shows only the parts for your modules — for example **Interviews this week** and **Follow-ups from meetings**.



The demo executive secretary's view, with the interviews and meetings grants.

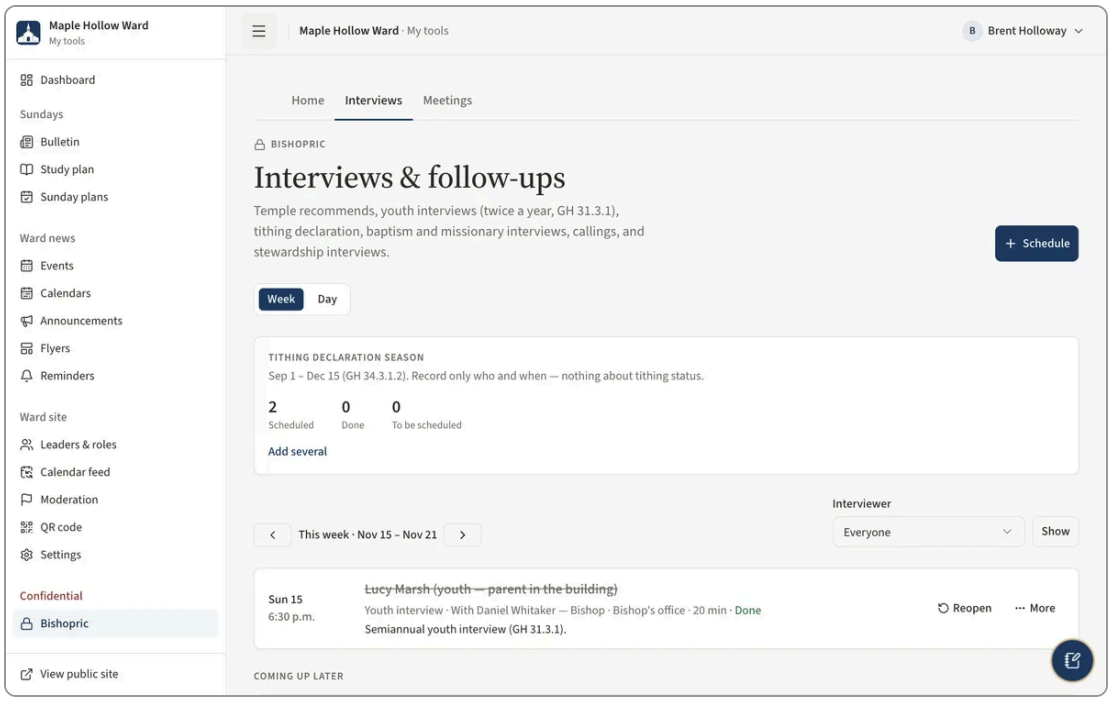
> ⓘ **Tip.** If the bishop grants you **Roster**: When the ward's LCR reports are getting old (about every three months), or hold no e-mail addresses, a notice appears at the top of the **Dashboard** and the bishopric **Home**. Choose **Upload LCR reports** to open **Roster** and upload fresh ones, or **Remind me later** to hide it for two weeks.

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02 Schedule interviews

1. Open **Interviews** and choose **Schedule**.
2. Enter the **Person (confidential)**, choose the **Kind**, **When**, **Length** (15 min by default) and **With**.
3. Add **Where** (a room, not a name), tick **Confirmed with the member** once they agree, and choose **Schedule**.
4. Use **Week** with the **Previous week** / **Next week** arrows, or **Day** for one Sunday with a column per interviewer.

5 Requests without a time go to **To be scheduled** — choose **Schedule** on the row when you have one. To change or remove an appointment, open the row's **More** menu and choose **Edit** or **Remove**.



The demo ward's interviews this week.

> ⓘ **Tip.** A save that clashes with the same interviewer's appointment warns **It overlaps another interview with the same interviewer.** — back-to-back is fine.

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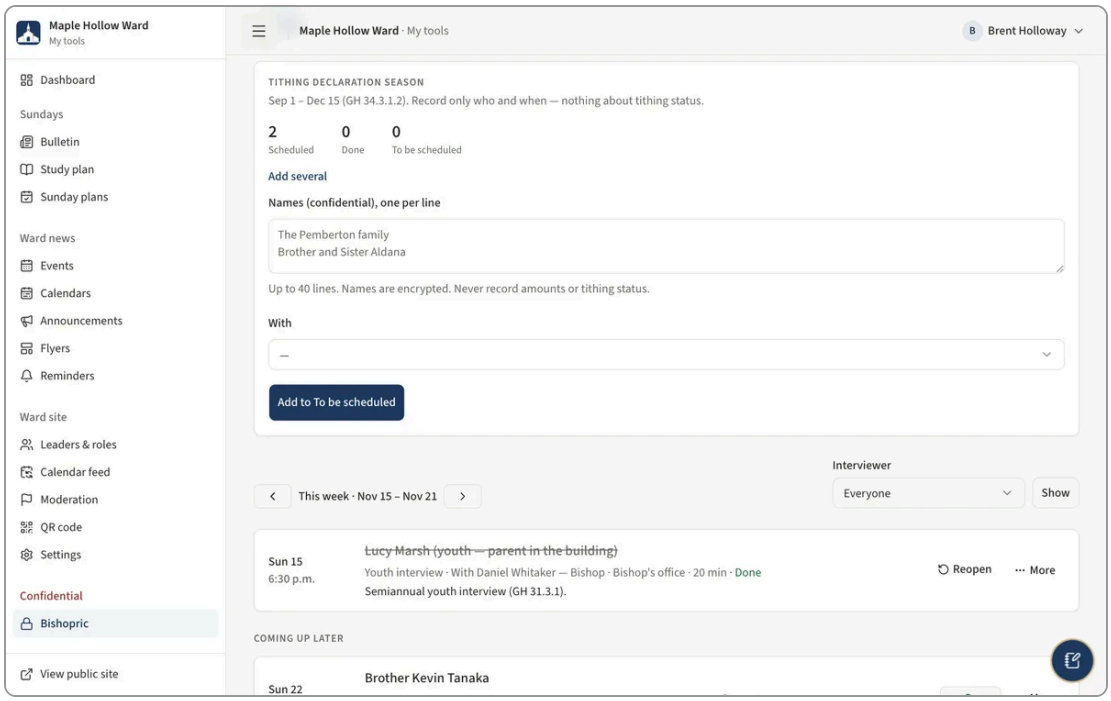
03 Add tithing declaration appointments in bulk

1 On **Interviews**, find **Tithing declaration season** and open **Add several**.

2 Type one family or person per line under **Names (confidential), one per line** (up to 40).

3 Pick **With** and choose **Add to To be scheduled**.

4 Give each one a time from **To be scheduled** with **Schedule**.



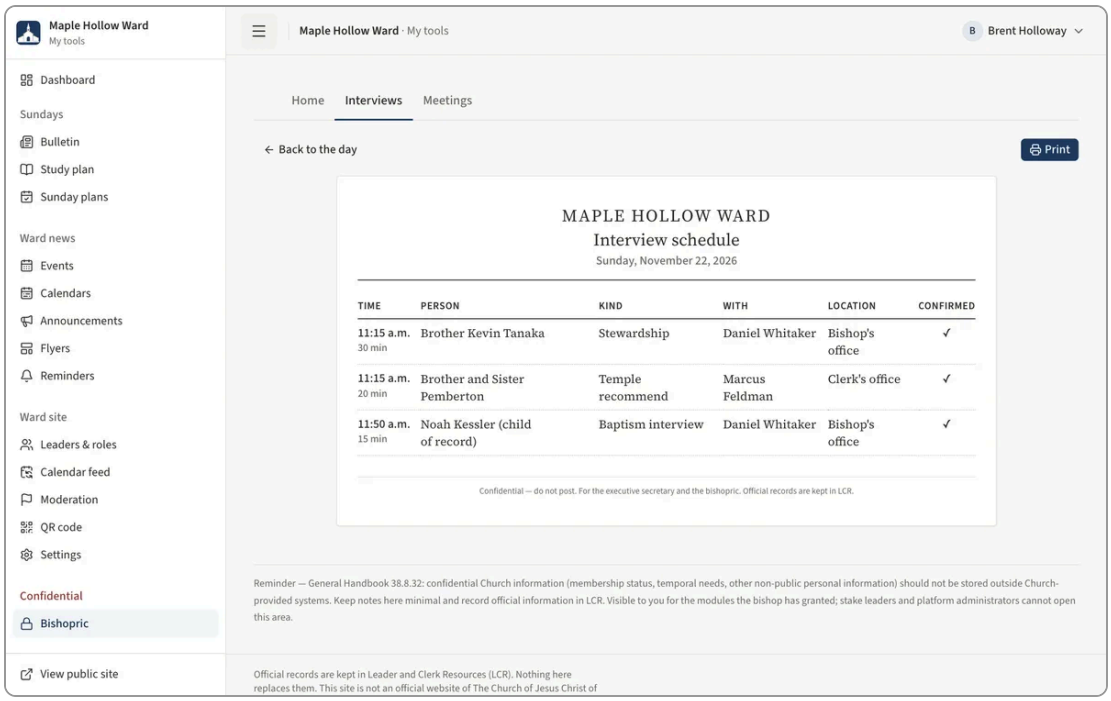
Tithing declaration season in the demo ward.

> **Confidential.** Record only who and when (GH 34.3.1.2). Never amounts or tithing status.

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04 Print the Sunday interview sheet

1. On **Interviews**, choose **Day**. It opens on the coming Sunday; **This Sunday** jumps back to it.
2. Choose **Print sheet**.
3. Check the sheet — time, person, kind, with, location and confirmed — and choose **Print**.



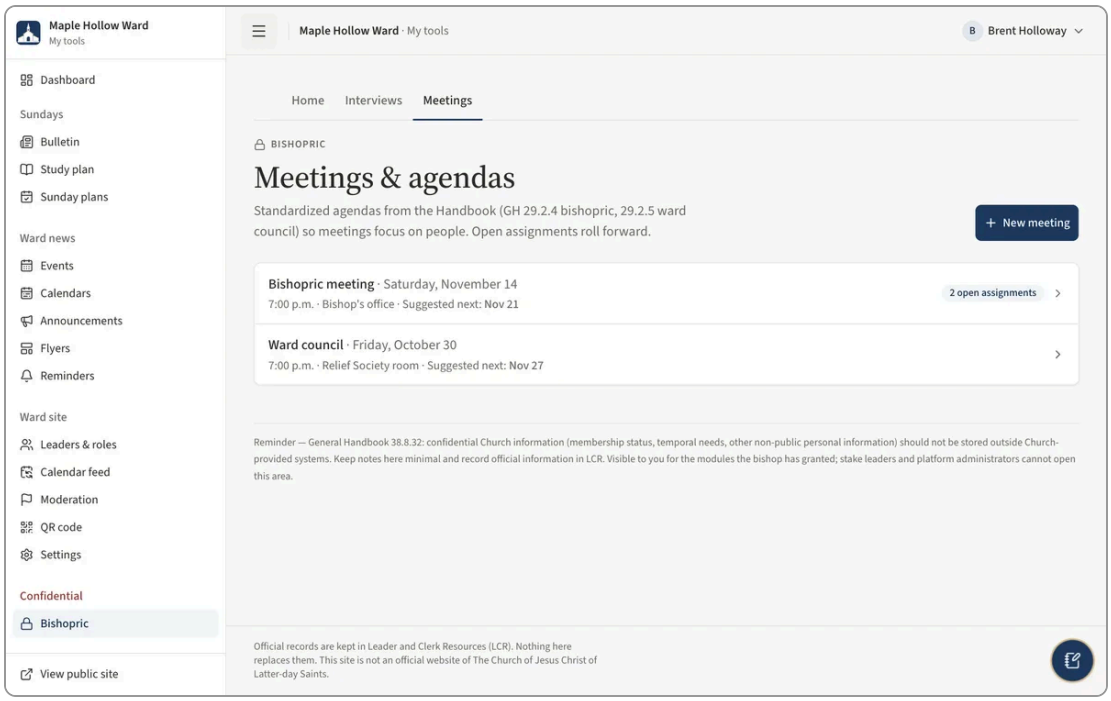
The demo ward's Sunday interview sheet, ready to print.

> **Confidential.** The sheet says **Confidential — do not post**. Notes are never printed; shred it after Sunday.

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05 Prepare agendas and track assignments

1. Open **Meetings** and choose **New meeting**. Pick **Bishopric meeting**, **Ward council** or **Ward youth council**, the **Date**, and the Handbook **Agenda template**, then **Create meeting**.
2. Open assignments from the last meeting of that kind are carried forward automatically.
3. During the meeting, choose **Add assignment**, enter the assignment, owner and due date, and **Add**. Tick it when done.
4. Choose **Print agenda** for paper copies. Back on **Meetings**, the latest meeting of each kind shows **Suggested next:** with a date — use **New meeting** to set it up.

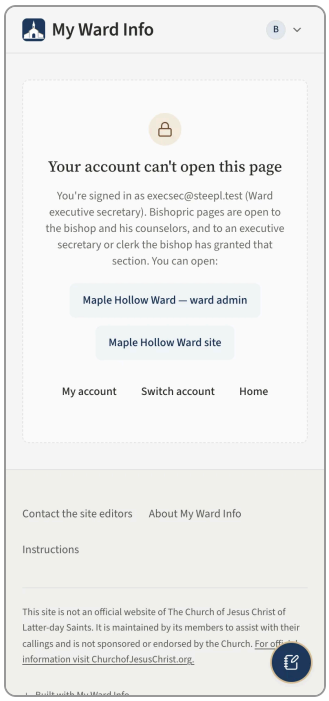


Meetings in the demo ward.

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06 When a page needs a grant

1. **Visits** and the **Conducting sheet** open only if the bishop grants them on **Access & audit**.
2. Without the grant, the page says **Your account can't open this page** and explains who can.
3. Ask the bishop; a grant takes effect immediately.



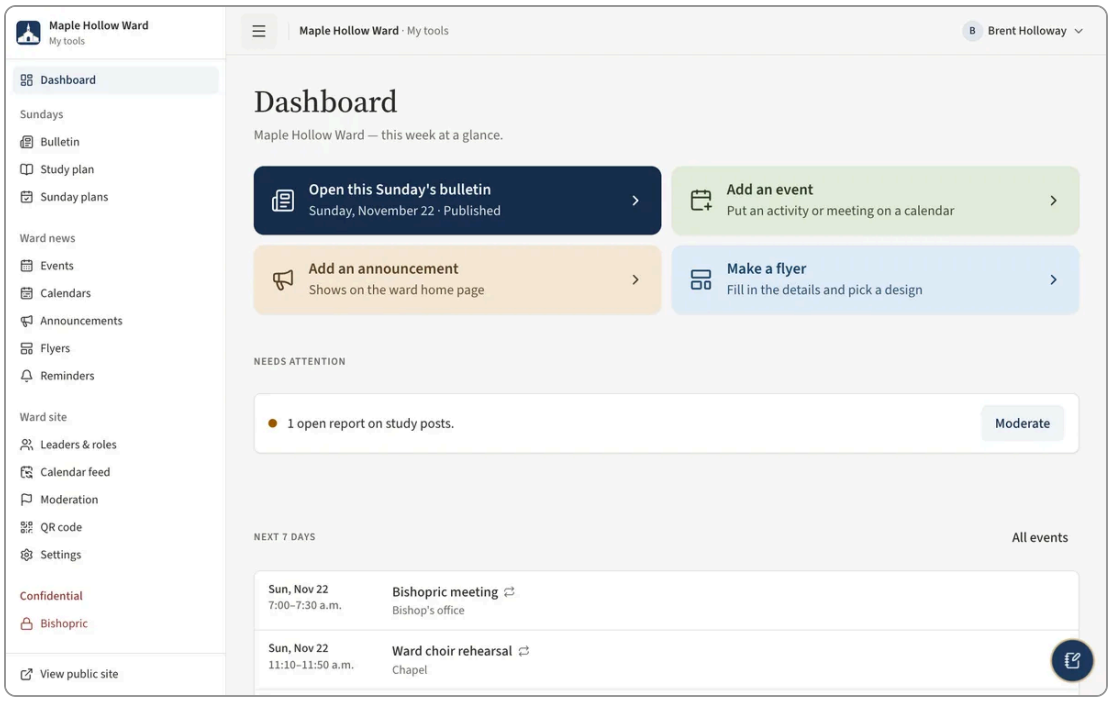
Opening Visits without the visits grant (demo executive secretary).

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07 Edit the ward site

As executive secretary you are a full ward editor. The site editor guide covers each page in detail.

1. Open **Admin**. The sidebar lists **Dashboard**, **Bulletin**, **Events**, **Announcements** and the other ward pages. On a phone or a tablet held upright, open it with the menu button at the top left.
2. The **Dashboard** lists what needs attention this week — a missing program, announcements waiting for approval.
3. Open **Bulletin** and choose a Sunday's date to fill in or publish its program.



The demo ward's admin dashboard.

UAT checklist

Tick each flow once you have confirmed it works as described. Note anything unexpected — a wrong label, a missing button, an error — under “What did you see?” and send it to your UAT coordinator.

- [ ] **Bishopric** shows only **Home**, **Interviews** and **Meetings** for the demo account
- [ ] **Schedule** adds an interview; leaving **When** empty puts it under **To be scheduled**
- [ ] **Add several** adds tithing declaration rows to **To be scheduled**
- [ ] **Print sheet** opens the Sunday interview schedule without notes
- [ ] **New meeting** creates an agenda; **Add assignment** adds an owner and due date
- [ ] Opening **Visits** without a grant shows **Your account can't open this page**
- [ ] After the bishop grants **Visits**, the tab appears and opens

What did you see?

Account used, date, device, and anything that did not match this guide.

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