TRAINING GUIDE · WARD LEADERSHIP

Ward clerk

The ward clerk keeps My Ward Info's leader directory and roles current, adds ward business to the program, and — with the bishop's grant — clears callings once they are recorded in LCR. He edits the ward site like any site editor and prints the QR poster for the doors.

Demo sign-in (Demo accounts → Sign in with email and password): `clerk1@steepl.test` · password `clerk1`

What you can do

- Clear callings and releases once recorded in LCR (with the **Callings** grant)
- Add sustainings, releases and other ward business to Sunday's bulletin
- Invite leaders by Google e-mail and import a typed-up leaders list
- Print the QR poster for the chapel doors
- Edit the bulletin, the calendars and announcements like any ward editor

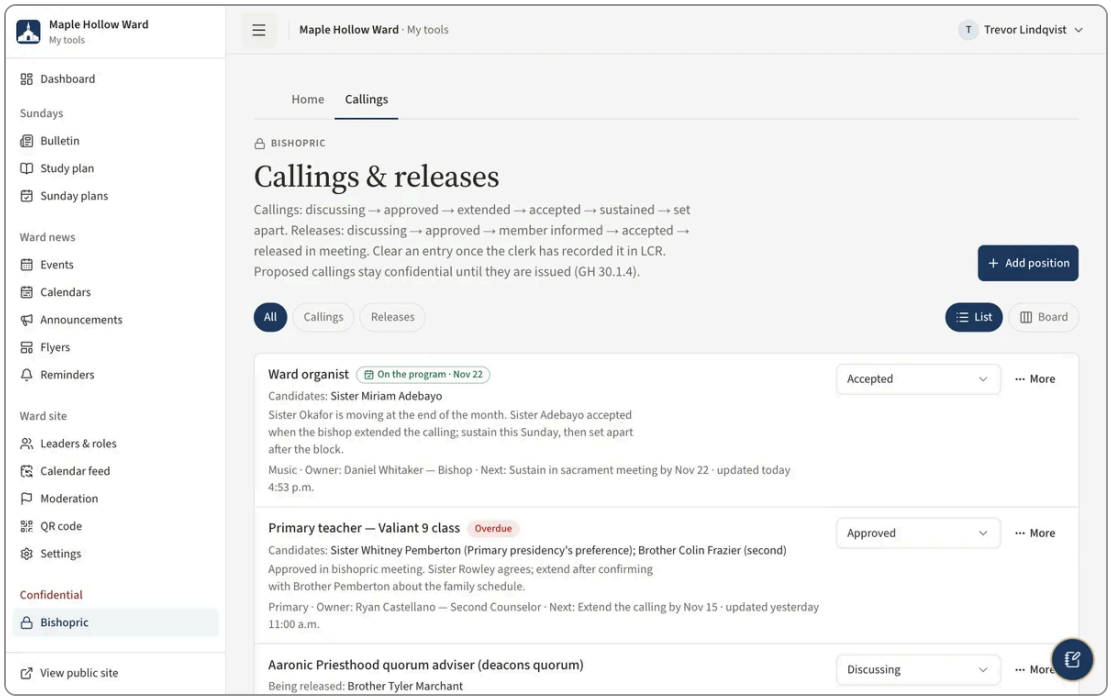
Before you start

- 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**.
- The **Bishopric** item appears under **Confidential** in the admin sidebar once the bishop has granted you a module. The demo clerk has **Callings** only.
- 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 Clear callings recorded in LCR

1. Open **Bishopric**, then **Callings**.
2. Entries that are sustained, set apart or declined have **Recorded in LCR** in the row's **More** menu.

3. Record the calling or release in LCR first, then open **More** on the row and choose **Recorded in LCR**.
4. The entry moves to **Cleared — recorded in LCR** at the bottom of the page.



The demo ward's callings pipeline, seen with the callings grant.

> ⓘ **Tip.** My Ward Info never replaces LCR. Clearing only removes the entry from the bishopric's active list.

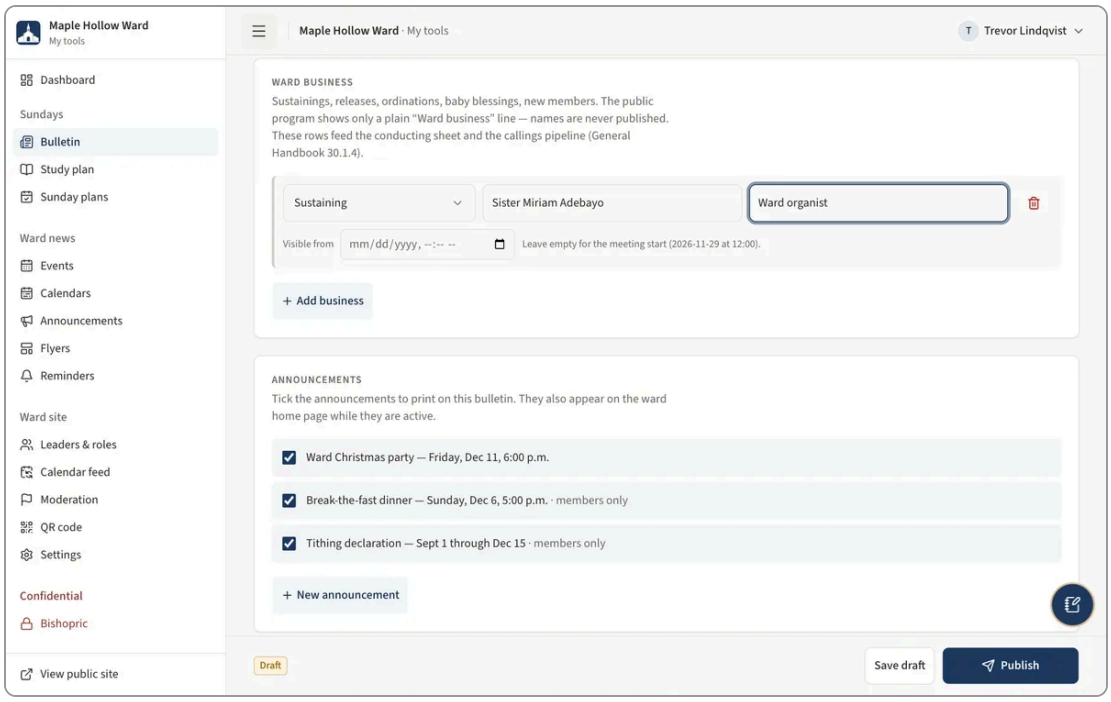
> ⓘ **Tip.** If the bishop grants you **Roster**: When the ward's LCR reports are getting old (about every three months), or hold no e-mail addresses, a notice appears at the top of the **Dashboard** and the bishopric **Home**. Choose **Upload LCR reports** to open **Roster** and upload fresh ones, or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

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02 Add ward business to the program

1. Open **Admin → Bulletin** and choose the Sunday's date (or **Start** for a Sunday with no program yet).
2. Under **Ward business**, choose **Add business**.
3. Pick the kind — **Sustaining**, **Release**, **Ordination (Aaronic Priesthood)**, **New ward member**, **Naming and blessing of a child**, **Confirmation** or **Other** — and type the name and position.
4. Leave **Visible from** empty (it defaults to the meeting start), then **Save draft**.

5 The names appear on the bishopric's conducting sheet. The members' program shows only a bare **Ward business** line — never the names.



Ward business on a demo program.

> 🕮 **Handbook note.** Callings are confidential until the person is presented (GH 30.1.4), which is why the public bulletin never lists ward business names.

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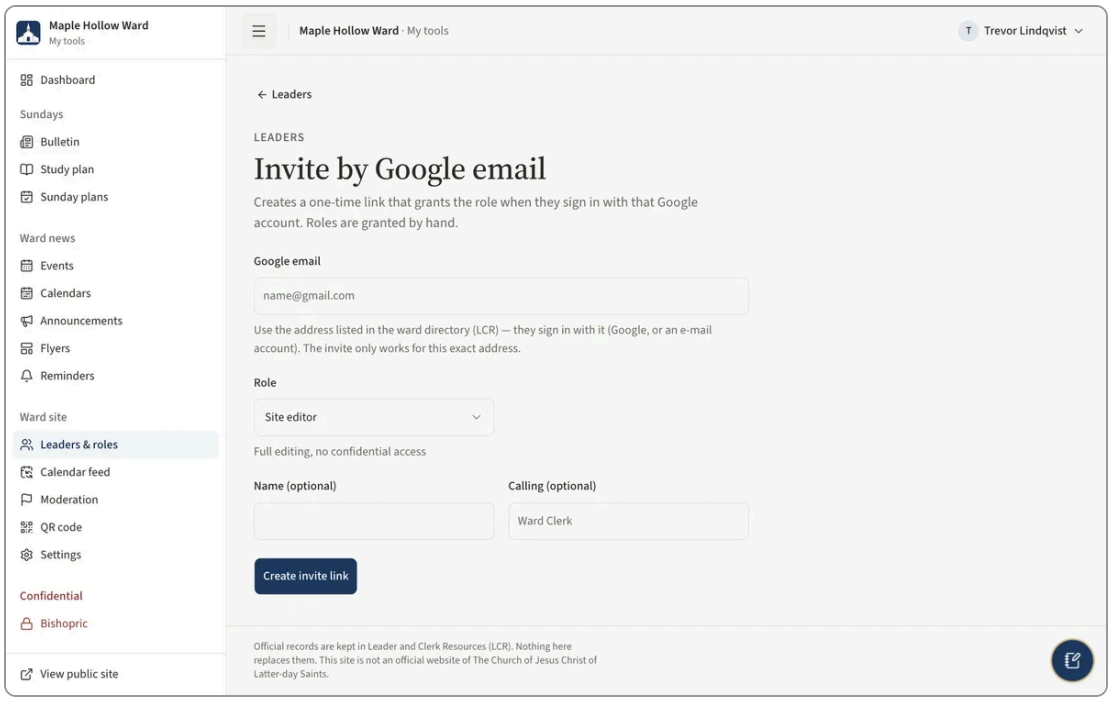
03 Invite a leader by Google e-mail

1 Open **Leaders & roles**, open **More** at the top and choose **Invite by email**.

2 Enter their **Google email**, the **Role** (and **Organization** for an organization leader), and optionally **Name** and **Calling**.

3 Choose **Create invite link**, then **Copy link** and send it. It works once, for that Google e-mail, and expires in 14 days.

4 Use **Add leader** for a directory-only entry (no sign-in), and **Record a release** on a leader's page when someone is released.



Inviting a leader in the demo ward.

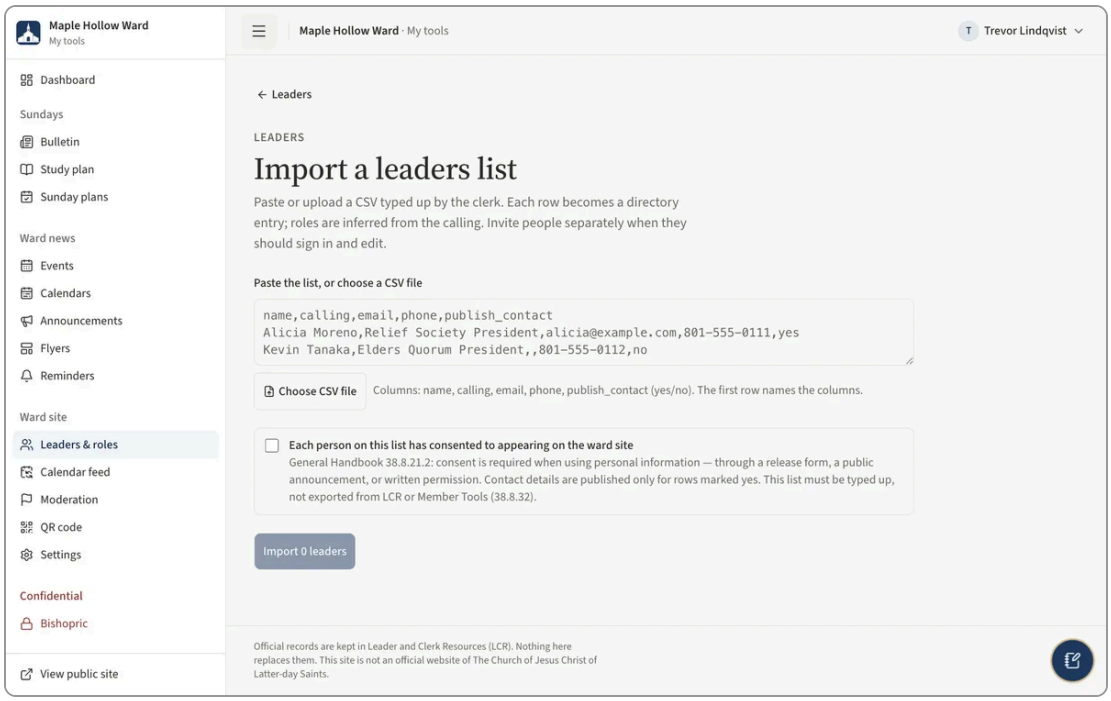
> ⓘ **Tip.** A clerk can invite organization leaders, music, site editors and members. Bishopric roles are granted by the bishopric (and the bishop role by the stake).

> ⓘ **Tip.** Roles are granted by hand — My Ward Info never reads callings from LCR.

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04 Import a leaders list

1. Open **Leaders & roles**, open **More** at the top and choose **Import CSV**.
2. Paste the list or choose **Choose CSV file**. Columns: name, calling, email, phone, publish_contact (yes/no); the first row names the columns.
3. Check **Preview** — name, calling, detected organization, contact, publish.
4. Tick **Each person on this list has consented to appearing on the ward site** and choose **Import** (the button shows the number of rows, for example **Import 12 leaders**).



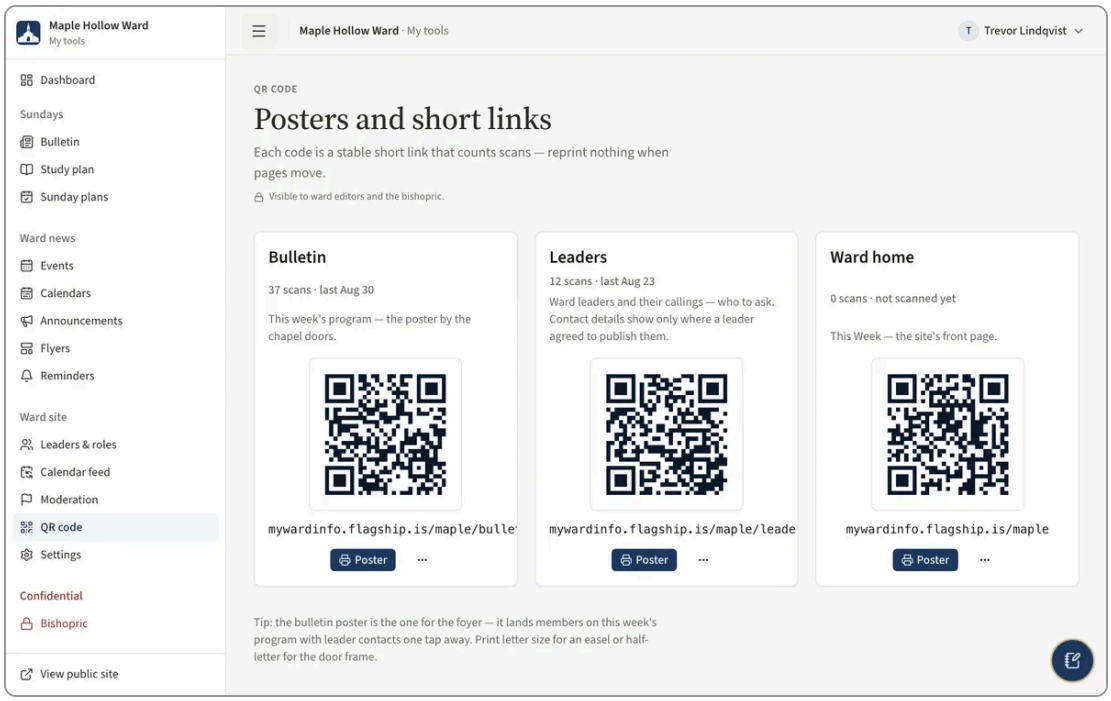
The leaders import page in the demo ward.

> **Handbook note.** Consent is required before personal information is published (GH 38.8.21.2). The list must be typed up — never exported from LCR or Member Tools (GH 38.8.32).

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05 Print the QR poster

1. Open **QR code**. The **Bulletin** card shows its scans and short link.
2. Choose **Poster**, then **Letter** or **Half-letter**, and **Print**.
3. To put the code in another document, open **More** on the card and choose **Download SVG** or **Download PNG**.



QR codes for the demo ward (short links shown on a sample domain).

> **Tip.** The code is a stable short link — reprint nothing when pages move.

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** and **Callings** for the demo clerk
- [ ] **Recorded in LCR** moves a calling to the cleared section
- [ ] A sustaining added under **Ward business** shows on the conducting sheet; the public bulletin shows only a bare **Ward business** line
- [ ] **Create invite link** returns a link for a site editor role
- [ ] The CSV import preview shows detected organizations and needs the consent box
- [ ] The QR **Poster** prints on Letter and Half-letter

What did you see?

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

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