Using MLS—Ward and Branch Instructions

System Sign-On

Each member using MLS must sign on to the system using his or her own user ID and password. Each user will see a different set of menus depending on his or her individual system access rights.

Important: Before entering MLS, make sure your system clock is set to the correct time and date. You should NEVER set the clock forward. You could corrupt your database, and you will be unable to enter MLS.

Security

1. **System Administrator.** An MLS system administrator must be assigned by the bishop. The system administrator maintains the list of MLS users and controls the security rights for those users.
2. **Passwords:** User passwords should not be shared with others. Each user should change his or her password periodically. Passwords must be at least eight characters long and must contain at least one numeric character and one alphabetic character.
3. **Who May Use MLS?** Bishopric members, the executive secretary, the ward clerk and assistant clerks, and priesthood and auxiliary leaders and their secretaries may be given access to MLS. It is important that all MLS users are assigned the correct access rights according to their callings.
4. **User Rights.** An MLS user should receive only the rights needed to perform his or her calling. For example, those who use MLS for entering donations (e.g., financial clerks, bishopric counselors) should have "Finance" rights. As members receive new callings or are released from callings, their access to MLS should be changed to reflect current assignments. The rights that may be assigned to MLS users include:
   a. **Administrative:** All MLS functions are available, including the rights to delete and add new users.
   b. **Update Membership:** Ability to view and update membership data.
   c. **Finance:** Ability to view and update ward financial data and view membership data.
   d. **View Membership:** Ability to view membership data but not update it.
   e. **Organization:** Ability to view and update organization data, such as callings or home and visiting teaching.
5. **Tasks Requiring Two Passwords.** Some tasks, such as the authorization of donation batches, require the entry of two passwords. This is to ensure an extra level of security for sensitive tasks.

Security (continued)	6. **MLS to Be Installed in Meetinghouses Only.** MLS should not be installed on home or office computers. The database contains sensitive membership and financial information that should not leave the meetinghouse.
System Navigation and Data Entry	1. **Menu Bar and Picture Panel Menus.** MLS has two types of menus. The menu bar at the top of the screen has standard drop-down menus. The picture panel menus provide lists of the most commonly used system functions for a given topic, with the ability to view additional functions by clicking on **More** at the bottom of the panel or by clicking on the panel picture. Both types of menus allow you to access many of the same system features, although some features are found only in the drop-down menus. 2. **Function Keys.** The following function keys may be used with many screens: F3 - Next Record F4 - Previous Record F5 - Chooser List 3. **Required Fields.** Required data items on a data entry screen are shaded to distinguish them from other data items. If this shading is difficult to see on your monitor, you may change the color using **User Options** on the **System Options** screen. 4. **Hot Links.** Many of the data screens and reports have underlined words in blue that transfer you to a related screen or allow you to perform a related action. 5. **Shortcut Keys.** Type **hot keys** in the search tool found in the help screen for information about these keys.
Headquarters Communication	1. **Single Communication Session.** Clicking **Send/Receive Changes** communicates both finance and membership data to Church headquarters. During the same session, changes are received from Church headquarters and applied to the MLS database. At this time, the user can print any resulting reports as prompted by MLS. It is essential that the clerk using **Send/Receive Changes** print and file all reports intended for him or any others. 2. **MLS software upgrades.** As part of the communication session, any updates to the MLS software are automatically sent to the local unit. You will be notified on the screen when changes are sent. These changes take effect the next time the computer is rebooted.

Data Backup	Data should be backed up at the end of each session. Select **Backup MLS to a File** on the **File** pull-down menu to back up data to the hard drive or a removable disk. You should back up to a removable disk at least once a week. Once a month you should make a copy of the backup and store it at a location away from the building.
MLS Training	**1. Test Units.** Two test units have been provided to allow you to train on MLS without modifying actual ward data. You may add these units to your MLS installation by selecting **Units** on the **System Options** screen. The unit numbers are 108–Test Ward, and 2224445–Test Stake. Data for these units is automatically added to the database when you add the units to MLS. You should not add the data for these test units until you have first added your own unit's data to MLS. **2. MLS Help.** At any time in MLS you may click **Help** in the upper right corner of the screen. A screen appears that provides instructions for the task you are currently performing. You may also select a different help topic using the help index on the left side of the help screen. **3. Tool Tips.** As you move the cursor over the menu options, a text box (tool tip) appears on the screen with a more detailed description of the menu option. Tool tips may be turned on or off by checking the box shown on the **User Options** screen under the **System Options** tab.
Additional New Features and Changes	***General*** **1. Urgent Tasks.** If there are overdue or unfinished tasks, a notification box pops up when you sign on to MLS. This box allows you to view the outstanding tasks that you need to perform. This box allows you to navigate to the area of MLS where the task may be performed. For example, you may need to send changes to Church headquarters, or the Member Progress Report may be due. **2. Report Formats.** Although most MLS reports contain the same information as the reports in MIS and FIS, their formats have been changed to take advantage of the graphic capabilities of the laser printer. **3. Sorting Reports.** Most reports can be sequenced in various ways by clicking on the column header of the column you wish to sort on. Each time you click the column header, the order is reversed between ascending and descending. When viewing the report, you may change the column width by placing the mouse pointer between column headers, clicking and holding, and then dragging the line left or right.

Additional New Features and Changes (continued)	4. **Stake Data Transfer.** At the beginning of each month, Church headquarters sends a copy of the ward's data to the stake to include in its database. This process should be transparent to the ward. There may be times other than the first of the month when the stake needs ward data. The ward may then send its data by selecting **Send Membership Data to Stake** on the **File** drop-down menu. 5. **Unit-to-Unit Messaging.** Wards may send messages to the stake and the stake may send messages to the ward. Sending messages between the ward and Church headquarters support is also available. *Membership* 1. **Certificates and Forms.** You can prepare and print membership-related certificates and forms in MLS. Click **More** on the **Record Ordinances** panel of the **Membership** tab. You will see the options **Print Certificate** and **Print Form** on the **Certificate** screen. 2. **Organizations.** Organization positions and classes have standardized names in MLS. You can add custom organizations and positions to the standardized names. 3. **Home and Visiting Teaching.** The method of entering home and visiting teaching organizations has changed with MLS. The new method allows quicker entry and better visibility of data. 4. **Custom Reporting.** Custom reporting has been greatly simplified. There is a set of predefined talents and skills available. You may also assign custom talents and skills to members to enhance custom reporting. 5. **Unit Statistics.** You may print lists of members making up the counts in the Unit Statistics Report. This feature is currently available in MIS, although it is not as visible and easy to use.

Additional New Features and Changes (continued)

6. **Data Export.** You may export selected MLS membership data for use in a spreadsheet or a handheld-computer application. Select **Export** on the **File** drop-down menu to produce data exports. The first four options on the selection list are comma-separated files (.csv) that may be loaded into a spreadsheet or any application that accepts this type of file. The last two file types are also .csv files specifically formatted for Palm® handheld computers. To load these files, go to the Palm Desktop application. Click on the **Address** feature. Add categories for family data and individual data. While in the family data category, use the **File – Import** menu option to bring up a file selection box. Change the **Files of Type** field to "Comma Separated (*.csv, *.txt)." Go to the folder containing the file called "PalmFamily.csv" that you created from the MLS export. Select this file and click on **Import** to load the data into the Palm Desktop application. Repeat the process with the "PalmIndividual.csv" file. When the files are loaded into the Palm Desktop application, hot sync with the handheld unit to transfer the data. Names are listed in the address list of the handheld in the category you selected. To see the detail information on the handheld, tap the name.

Finance

Important: After installing and implementing MLS, all manual checks in the checkbook must be turned in to the stake and shredded. All MLS-enabled units must input expenses into MLS and print checks using the check stock sent by Church headquarters. And immediately after a check is printed, the unit must transmit the expense to Church headquarters using the **Send/Receive Changes** option found under the unit name on the main MLS menu.

If MLS check information is not transmitted to Church headquarters as soon as the check is prepared, the check may not show up as an authorized payment on headquarters treasury reports. Consequently, the check may inadvertently be rejected as a possible forged or fraudulent item.

To avoid the possibility of embarrassment to the Church and the recipient because of a rejected MLS check, it is essential that all MLS checks be immediately transmitted to Church headquarters as soon as the checks are prepared. (See "Positive Pay" below.)

1. **Tithing Settlement.** Each donor statement now takes one page instead of two. The bishop is now required to make a tithing declaration for all ward members, both children and adults. FIS requires a declaration for donors only.

Additional New Features and Changes (continued	2. **Positive Pay.** All expenses by the ward must be entered into MLS immediately. This allows the Church to verify the authenticity of the check when asked to disperse funds to cover the check. ***Your check could be rejected if you do not immediately enter it in MLS and transmit.*** 3. **Automatic Check Writing.** Automatic check preparation allows you to print checks on your printer and record the check in MLS at the same time. Select **Finances** from **System Options** and check the **Print Checks** box. ***All manual checks should be turned in to the stake.*** 4. **Missionary Funds.** Record missionary charges by selecting **Enter Expenses** on the **Finances** tab. However, you must check the **Not a Check** box when recording the expense. (You may also enter these missionary funds on the **Other Items** tab of the **Reconcile** screen.) 5. **Recording Distribution Services Charges.** Record Distribution Services charges by selecting **Enter Expenses** on the **Finances** tab. However, you must mark the **Not a Check** box when recording the expense. (Do not use the **Other Items** tab of the **Reconcile** screen to record distribution charges.) 6. **Recording Interest.** Click on **Reconcile** on the **Finances** tab. This will bring you to the **Reconcile** screen. Click on **Balances** on the left side of the screen. Enter any interest received in the account in the **Interest** field. 7. **Reconciliation.** MLS will help you reconcile your checking account. See the reconciliation instructions that came with your implementation packet for details.
Getting Help	The stake clerk and assistant stake clerks should become experts at using MLS and should ensure that ward and assistant ward clerks are trained to use the system. Ward clerks should consult with the stake clerks if they have questions about MLS.