THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

How To

Microsoft Dynamics

Microsoft Dynamics is a customer relationship management (CRM) system intended to display accurate data for S&I personnel concerning the status of all current and potential seminary and institute students. The intent of this system is to assist in recruitment efforts for S&I administrators and personnel.

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View Students for Recruitment

View Students in a Program

The following views are available for programs. See the instructions following the list of views to learn how to access a view.

View	What you see
Converts	Students baptized within the last 90 days.
Enrolled	Students who have registered for and attended a seminary or institute class, as recorded in WISE.
Missionaries	Students eligible for institute who have returned from a mission within the last 90 days.
Move-ins	Students who have moved into the area within the last 90 days.
New Potential	Students who have become eligible for seminary or institute within the last 90 days.
Non Registered	Students who have not registered.
Not Enrolled	Students who have registered but have not yet attended a class.
PENCES—Anytime	Students who were previously enrolled at any time but are not currently enrolled.
PENCES—Previous Term	Students who were enrolled in the previous term but are not currently enrolled.
Potential	Campus programs: Students who attend a given school who are potential students for the program that the school supports. Stake programs: Students who are potential students for the program that is agent to the stake in which they live.
Registered	Students who are registered.
Returning Missionaries—Next 90 Days	Students eligible for institute who will return from a mission within the next 90 days (based on scheduled return date).

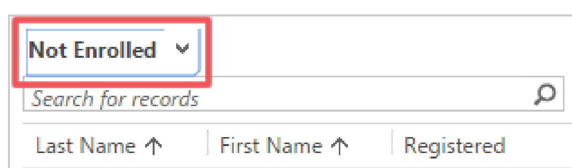
For this example, we'll find students who are not enrolled.

1. At the top of the page, under **Menu**, click **Programs**.

   Note: Double-click the program you want if more than one option is available.

2. On the view drop-down list, select **Not Enrolled**.

   Note: Click a column heading to sort the list by ward, stake, age, school, and so forth.



3. To print a report, at the top of the report, click **Run Report** and select **Not Enrolled**.

4. At the top of the report, click the **Export** button and select **CSV (comma delimited), Excel**, or **Word**, depending on which program you have.

5. After you export the report, delete any information not needed. For example, you may want to keep only the name, school, and phone number or the name, ward, and address.
6. Print the list.

Filtering Select Reports

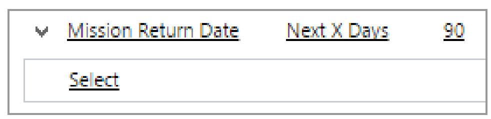
Some reports show potential students within the last 90 days. On these reports, you can use the Edit Filter button to change the number of days to display. For example, you can view returned missionaries for 365 days or within the last year. Or you could view new converts from the past year vs the past 90 days. The reports with this added feature are:

- Converts
- Missionaries
- Move-ins
- New Potential

1. At the top of the Programs page, click **Run Report** and click the report you want, such as **Missionaries**.

2. At the top of the report, click **Edit Filter**.

3. On the first filter, "Mission Return Date," change 90 to the number of days you want the report to cover, such as 365.



4. At the bottom, click **Run Report**. The report will be generated again.

5. To export the report, click the **Export** button at the top. Click **CSV (comma delimited)**, **Excel**, or **Word**, depending on which program you have.

6. After you export the report, delete any information not needed.
7. Print the list.

View Students in a Stake

The following views are available for stakes. All views are available as seminary only or institute only. See the instructions following the list of views to learn how to access a view.

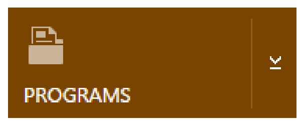
View	What you see
Enrolled	Students who have registered for and attended a seminary or institute class, as recor-

View	What you see
	ded in WISE.
Non Registered	Students who have not registered.
Not Enrolled	Students who have registered but have not yet attended a class.
Potential	Students in a given stake who meet the age requirement and who have completed eighth grade (potential for seminary) or graduated high school (potential for institute), according to Church membership records.
Registered	Students who are registered.
Registered not Enrolled	Students who have registered but have not attended a class, as recorded in WISE.
Stake Summary	Statistics and list of all potential students in a stake and their current registration and enrollment status.

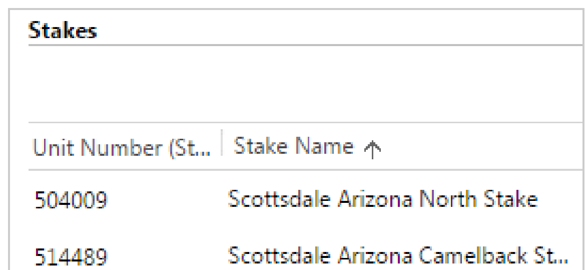
For this example we'll find potential students.

1. At the top of the page, under **Menu**, click **Programs**.

   Note: Select the program you want if more than one option is available.



2. In the list of stakes, click the stake you want to view information about.



3. At the top, click **Run Report**, and select **Potential**.

4. At the top of the report, click the **Export** button, and select **CSV**, **Excel**, or **Word**, depending on which program you have.

5. After you export the report, delete any information that is not needed. For example, you may want to keep only the name, school, and phone number.
6. Print the list.

View Students in a Ward

The following views are available for wards. All views are available as seminary only or institute only. See the instructions following the list of views to learn how to access these views.

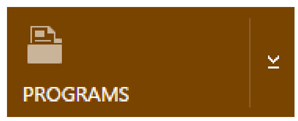
View	What you see
Enrolled	Students who have registered for and attended a seminary or institute class, as recor-

View	What you see
	ded in WISE.
Non Registered	Students who have not registered.
Not Enrolled	Students who have registered but have not yet attended a class.
Potential	Students in a given ward who meet the age requirement and who have completed eighth grade (potential for seminary) or graduated high school (potential for institute), according to Church membership records.
Registered	Students who are registered.
Registered not Enrolled	Students who have registered but have not attended a class, as recorded in WISE.
Ward Summary	Statistics and list of all potential students in a ward and their current registration and enrollment status.

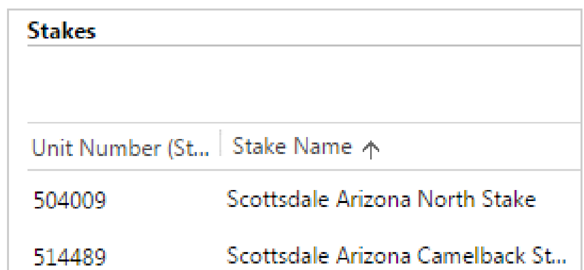
For this example we'll find students who are registered but not enrolled.

1. At the top, under **Menu**, click **Programs**.

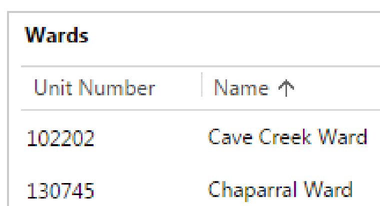
   Note: Select the program you want if more than one option is available.



2. In the list of stakes, click the stake you want to view information about.

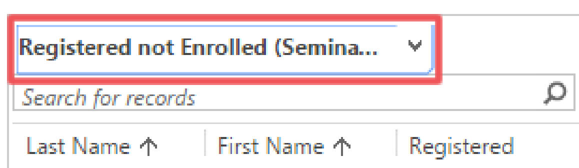


3. In the list of wards, click the ward you want to view information about.



4. On the view drop-down list, select **Registered not Enrolled**.

   Note: Click a column heading to re-sort the list by age, school, and so forth.



5. To print a report, at the top click **Run Report**, and select **Registered not Enrolled**.

6. At the top of the report, click the **Export** button and select **CSV, Excel**, or **Word**, depending on which program you have. 
7. After you export the report, delete any information that is not needed. For example, you may want to keep only the name, school, and phone number.
8. Print the list.

Recruitment Examples

Following are examples of how you can use Microsoft Dynamics in your recruitment efforts. The solution lists the steps you would follow. Each step is separated by a greater-than sign (>).

1. At the end of the first term, a seminary or institute administrator wants to know which students have not registered for the next term in order to contact those who had a class but are not scheduled for another class (list by teacher).

   Solution: Program page > Views > PENCES – Previous Term > RUN VIEWS > PENCES – Previous Term > Export and modify the report > Sort by school and grade.

2. A seminary or institute student council adviser wants to give members of the seminary or institute council lists of students who are not enrolled, including student contact information, so that personal contacts can be made (limit info, limit number).

   Solution: Program page > Views > Not Enrolled > RUN VIEWS > Not Enrolled > Export and modify the report.

3. The list of students who are not enrolled is being reviewed in a faculty meeting. Reports are made on invitations that have been extended during the week, and assignments are made for the upcoming week's contacts.

   Solution: Program page > Search for student > Student page > Notes > Add note.

4. The local seminary or institute program administrator wants to connect with local full-time missionaries about recent youth or YSA converts in the area in order to coordinate invitations and have the missionaries bring the converts to their first class.

   Solution: Program page > Views > Converts – Last 30 Days > RUN VIEWS > Converts – Last 30 Days > Export and modify the report.

5. Local institute leaders want to invite all the current high school seniors to an event and introduce them to the institute program.

   Solution: Program page > Views > Potential > RUN VIEWS > Potential > Export and modify the report.

6. Institute personnel want to make weekly contact with those who have recently returned from missions.

   Solution: Program page > Views > Returning Missionaries – Last 30 Days > RUN VIEWS > Returning Missionaries – Last 30 Days > Export and modify the report.

7. Stake representatives want to report their seminary and institute recruitment effort to their local priesthood

leaders.

Solution: Stake page > Views > Stake Summary > RUN VIEWS > Stake Summary > Export and modify the report.

8. Local institute personnel want to know who the potential students are for their program in the summer, immediately after high school graduation.

   Solution: Program page > Views > Potential > RUN VIEWS > Potential > Export and modify the report > Sort by grade.

9. A seminary or institute teacher wants to know who has moved into his or her ward (area) over the summer so that personal invitations may be extended.

   Solution: Program page > Views > Move-ins – Last 30 Days > RUN VIEWS > Move-ins – Last 30 Days > Export and modify the report.

10. A coordinator wants to know when missionaries are returning home so that institute personnel can meet them at the airport.

    Solution: Program page > Views > Returning Missionaries – Last 30 Days > RUN VIEWS > Returning Missionaries – Last 30 Days > Export and modify the report.

11. A coordinator wants to know which students are off-track from BYU–Idaho so that they can be invited to participate in institute.

    Solution: Program page > Views > PENCES – Anytime in Past > RUN VIEWS > PENCES – Anytime in Past > Export and modify the report.

12. An S&I teacher takes a personal invitation to the home of a potential student. The teacher wants to be able to easily record the results of the visit.

    Solution: Program page > Search for student > Student page > Notes > Add note.

13. A high school graduate wants to know what institute options are available immediately after graduation.

    Solution: Microsoft Dynamics cannot answer this question. It only indicates what program students are in.

14. A seminary or institute program administrator wants to invite all institute students and high school seniors to the worldwide devotional for young adults that is held in May.

    Solution: Program page > Views > Potential > RUN VIEWS > Potential > Export and modify the report > Sort by grade.

15. During the registration process for seminary or institute, a coordinator wants to send a weekly status email to priesthood leaders.

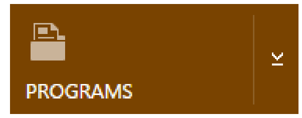
    Solution: Stake page > RUN VIEWS > Stake Summary > Export and modify the report > Export the report as a PDF > Send the report in the email.

Prepare Reports

Create a Report from a View

You can export and print a report from any view. In this example we'll create a report of students who are not enrolled, so that personal contacts can be made.

1. At the top, under **Menu**, click **Programs**.

   Note: Select the program you want if more than one option is available.
2. At the top, click **Run Report**, and then select **Not Enrolled**.

   Note: Some reports have options for all students, seminary only, or institute only.
3. At the top of the report, click the **Export** button, and select **CSV (comma delimited)**, **Excel**, or **Word**, depending on which program you have.

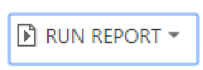
   
4. After you export the report, delete any information not needed. For example, you may want to keep only the name and phone number or the name and address.
5. Print the list.

Filtering Select Reports

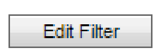
Some reports show potential students within the last 90 days. On these reports, you can use the Edit Filter button to change the number of days to display. For example, you can view returned missionaries for 365 days or within the last year. Or you could view new converts from the past year versus the past 90 days. The reports with this added feature are:

- Converts
- Missionaries
- Move-ins
- New Potential

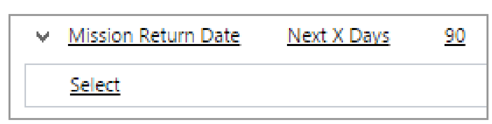
1. At the top of the Programs page, click **Run Report**. Click the report you want, such as **Missionaries**.

2. At the top of the report, click **Edit Filter**.

3. On the first filter, "Mission Return Date," change 90 to the number of days you want the report to cover, such as 365.

4. At the bottom, click **Run Report**. The report will be generated again.

5. To export the report, click the **Export** button at the

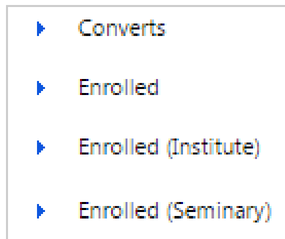
top. Click **CSV (comma delimited)**, **Excel**, or **Word**, depending on which program you have.

6. After you export the report, delete any information not needed.
7. Print the list.

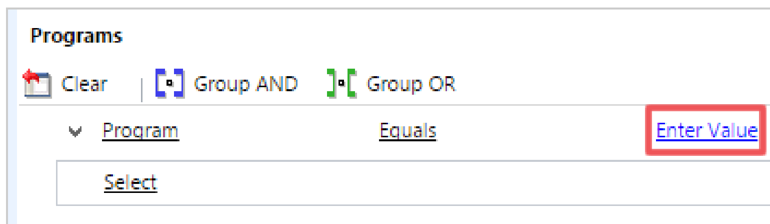
Create a Report from the Reports Page

1. At the top, under **Menu**, click **Reports**.

2. Select the report you want from the list. Some reports have options for all students, seminary only, or institute only. After you select the report you want from the list, the Advanced Find window will open.



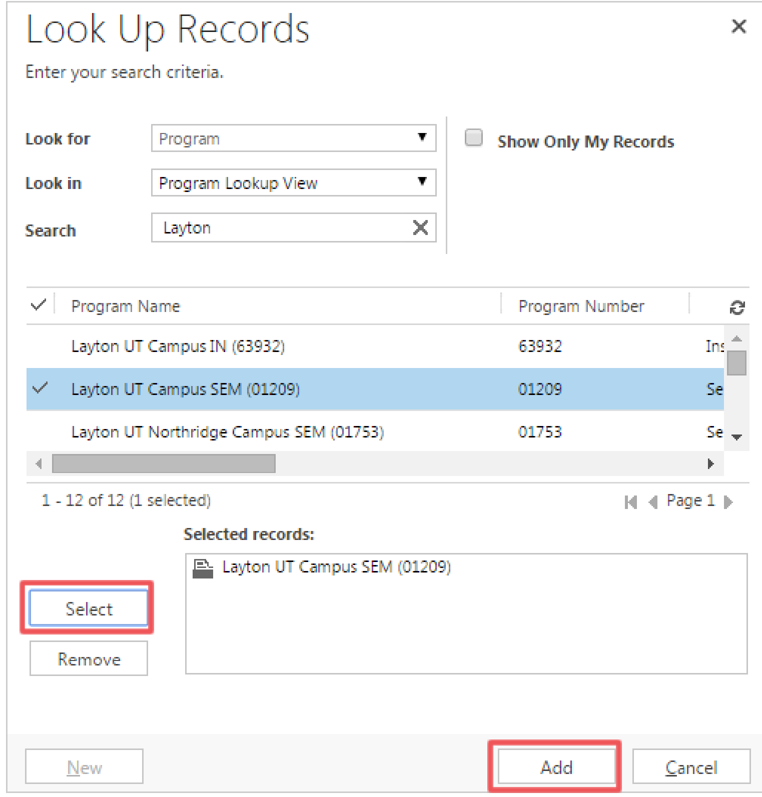
3. For the item listed, such as Programs, click **Enter Value** on the right.



4. Enter part of the program name that you want to find a report for, and then click the **Search** button.

5. From the list of program names, click the desired program to highlight it, and then click **Select**. When you are finished, click **Add**.

   Note: If you want to print reports for more than one program, click all of the programs you want to print, and click **Select.** Then click **Add.**



6. At the bottom of the Advanced Find screen, click **Run Report**.

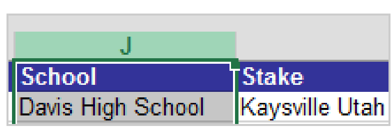
7. At the top of the report, click the **Export** button, and select **CSV**, **Excel**, or **Word**, depending on which program you have.

8. After you export the report, delete any information not needed.
9. Print the list.

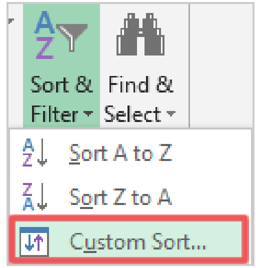
Modify a Report in Excel

Because much of the information about students is confidential, delete any information that is not needed by leaders or teachers with whom you are sharing reports. Only include information about students who are the responsibility of the person you are giving the report to.

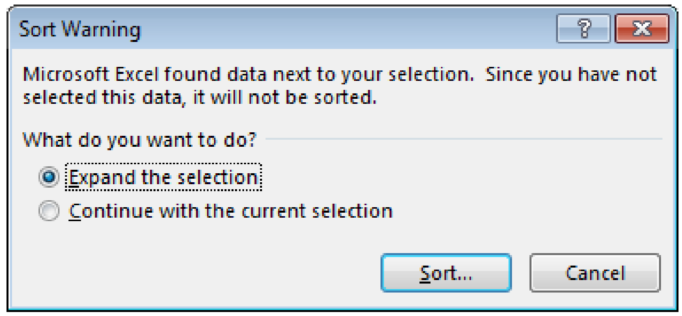
1. Depending on the export options, your report may or may not have headings in the list. To re-sort the list, click the column header that you want to sort on.



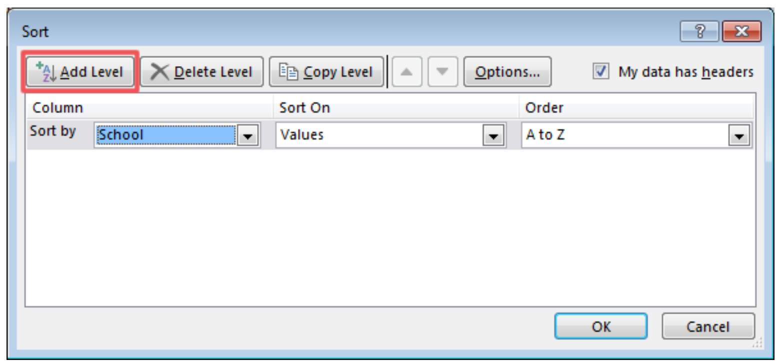
2. At the top right of the Excel file, click Sort & Filter, and select Custom Sort.



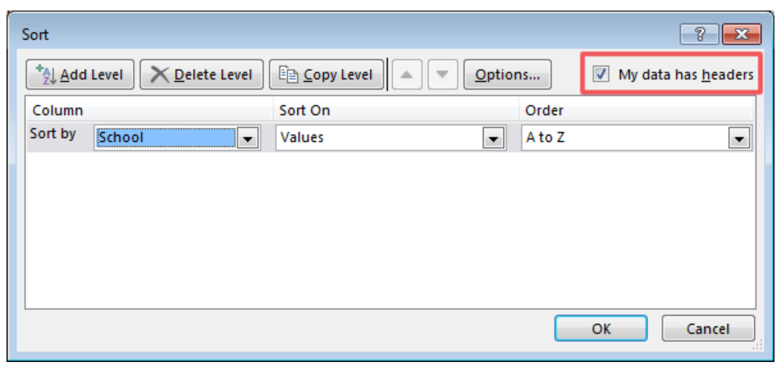
3. A pop-up window titled Sort Warning will appear. Keep the option Expand the selection. This will keep all of your data together when you re-sort this column. Click Sort.



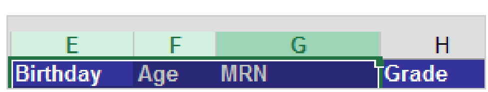
4. After you click Sort, a new window will open. This Sort window allows you to sort by levels. For example, you could sort first by school or ward and then by age. Click Add Level if you want to add another level to your sort.



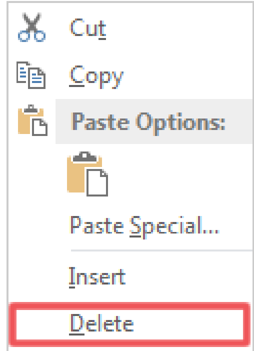
5. If the data has headers, click My data has headers. This will sort the rows with data and not the headers. Then click OK.



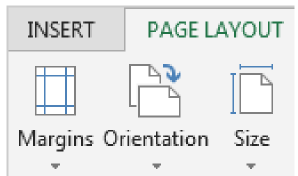
6. To delete columns or rows, click and drag to highlight the columns or rows you want to delete.



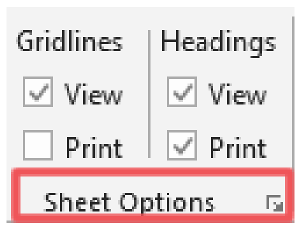
7. Right-click what you have highlighted, and select **Delete**. If columns are deleted, any columns to the right will move left. If rows are deleted, any rows below will move up.



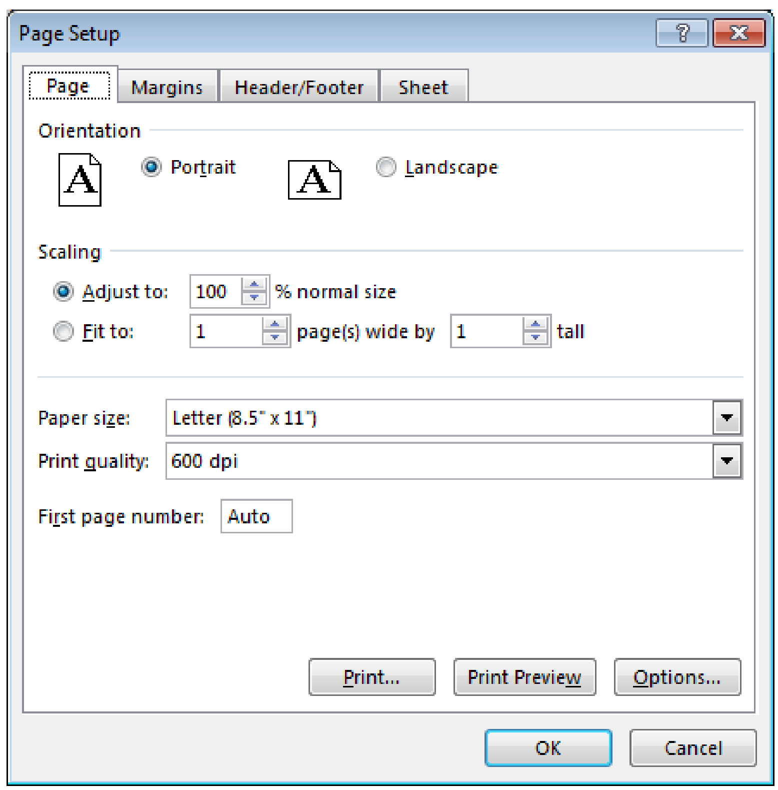
8. At the top of the Excel file, click **Page Layout**.



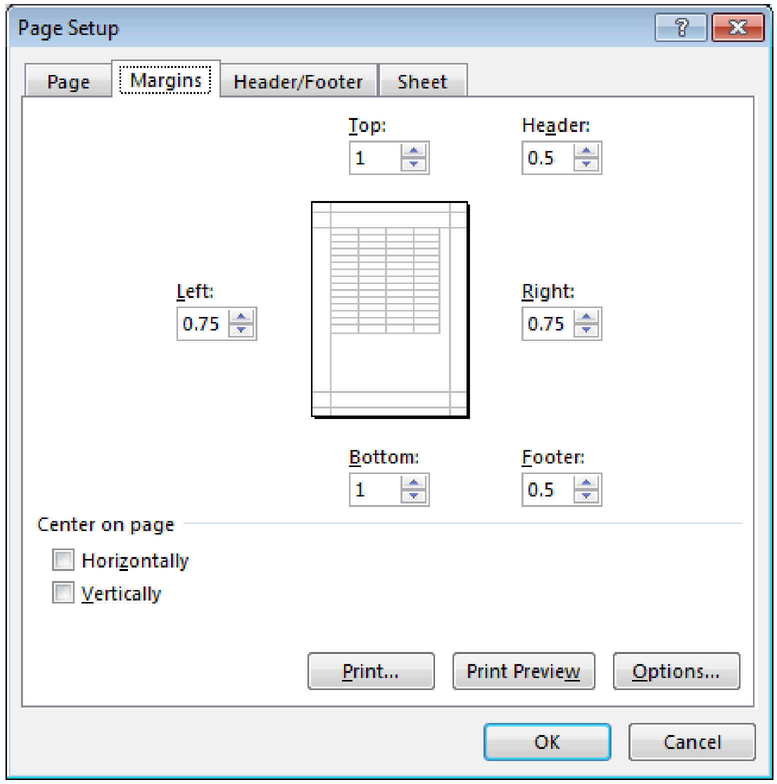
9. You can set different print options. To print the heading labels on each page, go to Sheet Options under Headings, and click the **Print check box**. This will print the heading labels on each page.
10. Click the small button to the right of **Sheet Options**.



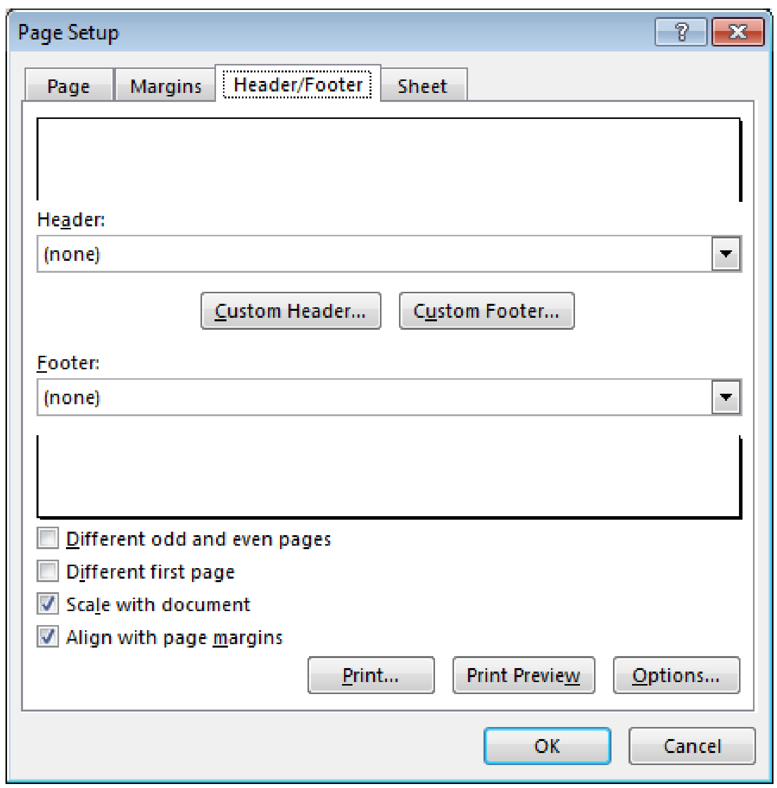
11. The Page Setup window will open. On the Page tab, you can set the page orientation and paper size.



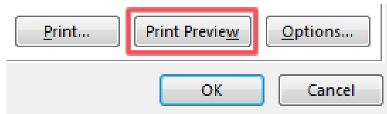
12. On the Margins tab, you can set the printing margins.



13. On the Header/Footer tab, you can add a title for your report in the header and a date or page number in the footer.

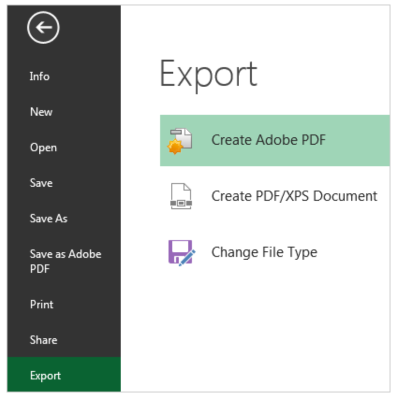


14. When you are done setting print options, click Print Preview at the bottom of the Page Setup window.



15. If you are satisfied with the report, click Print. If not, return and adjust your settings.

16. When you are finished preparing your report, you can print it or export it as a PDF to email to someone.

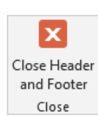


Modify a Report in Word

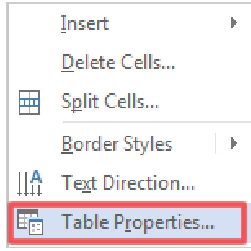
Because much of the information about students is confidential, delete any information not needed by leaders or teachers with whom you are sharing reports. Only include information about students who are the responsibility of the person you are giving the report to.

Note: If you export a report in Word, the report appears as a table. Word includes the title of the report as the first row and the column headers as the second row. You will need to move the title into a header and delete that row so the column headers become the first row of the table.

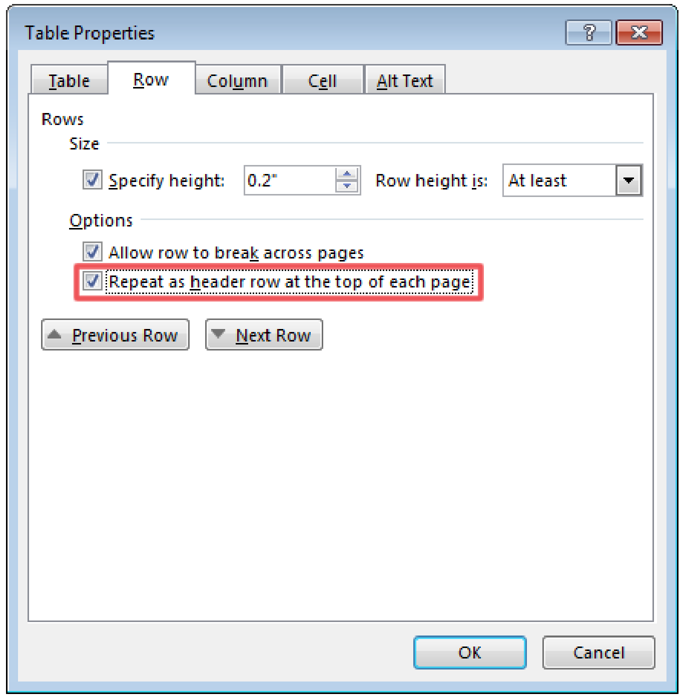
1. To move the title into a header, copy the title of the report. Then at the top of the Word file, click Insert, and then click Header.
2. Paste the title into the header, and then click Close Header and Footer.



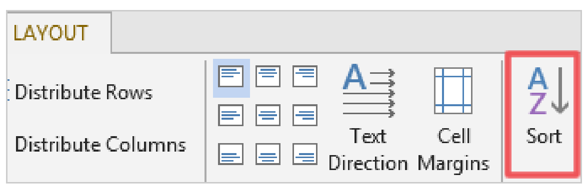
3. Delete the first row, which has the title of the report.
4. Right-click the column header row, and select Table Properties.



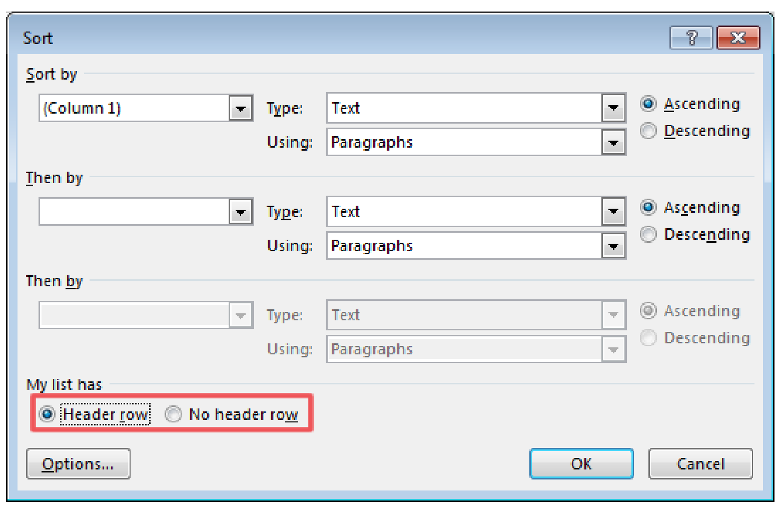
5. At the top of the Table Properties window, click the Row tab, and then click the check box Repeat as header row at the top of each page. Click OK. The column headers will now display at the top of each page.



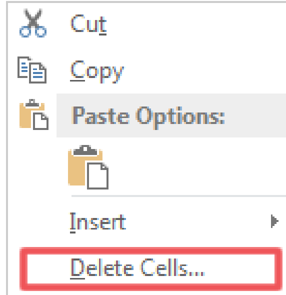
6. To re-sort the list, click inside the table. At the top of the Word file, click Layout, and then click Sort.



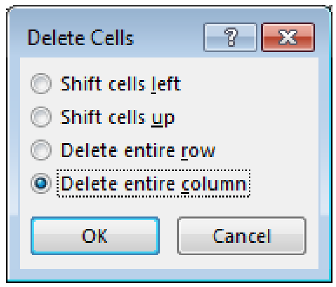
7. This will open the Sort window, which allows you to sort by levels. For example, you could sort first by school or ward and then by age. If the table has headers, click Header row. This will sort the rows with data and not the header row.
8. When you are done selecting options, click OK.



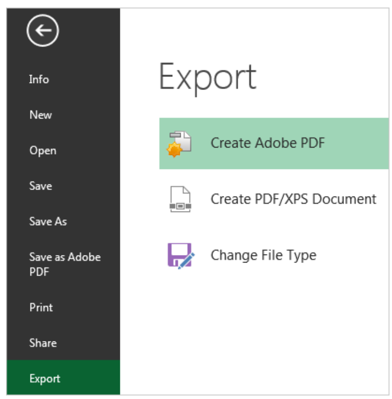
9. To delete columns or rows, click and drag to highlight the columns or rows you want to delete.
10. Right-click, and select **Delete Cells**.



11. Indicate whether to Delete entire row or Delete entire column, and click **OK**.



12. When you are finished preparing your report, you can print it or export it as a PDF to email to someone.

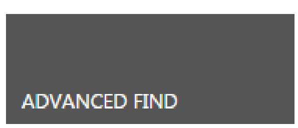


Use Advanced Find to Create a Report (Single Program)

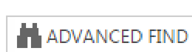
Use Advanced Find to create your own reports or to find records for an email list. There is a slight difference in how you use Advanced Find depending on whether you are over one program or multiple programs. These instructions apply when you are over only one program.

In this example we'll create a list of high school seniors in a stake.

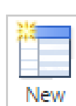
1. At the top of any page, under Menu, click **Advanced Find**.



2. At the top of the Advanced Find page, click **Advanced Find**.

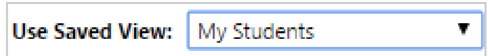


3. At the top of the Advanced Find screen, click **New**.

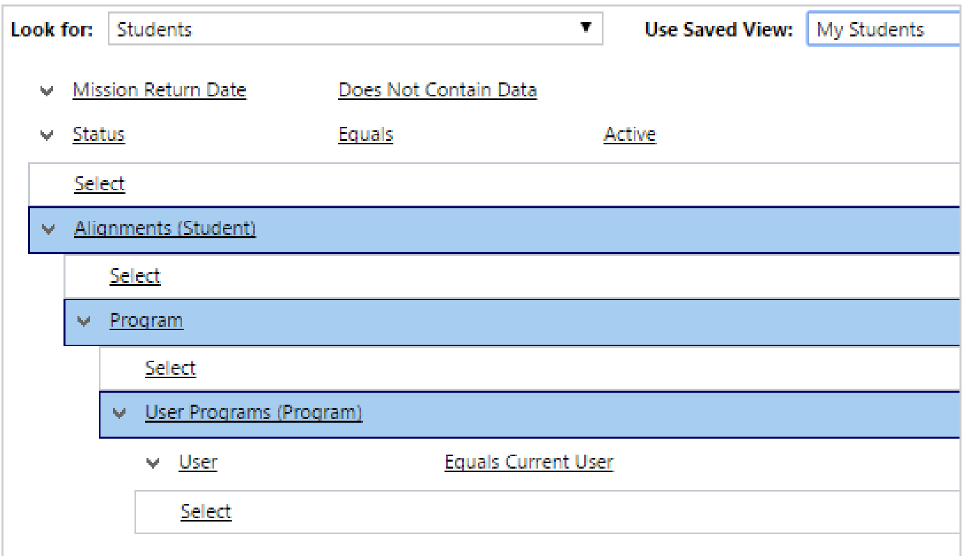


4. In the Look for drop-down menu, select **Students**.

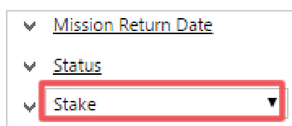
5. Under Use Saved View, click **My Students**.



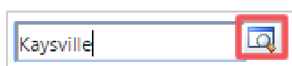
There will be two criteria listed below the Look for drop-down menu and Use Saved View: (1) **Mission Return Date**, **Does Not Contain Data** and (2) **Status**, **Equals**, **Active**. There will also be several blue rectangles. Do not change the criteria or select items under the blue rectangles.



6. Under Status, click **Select**, and select **Stake**.

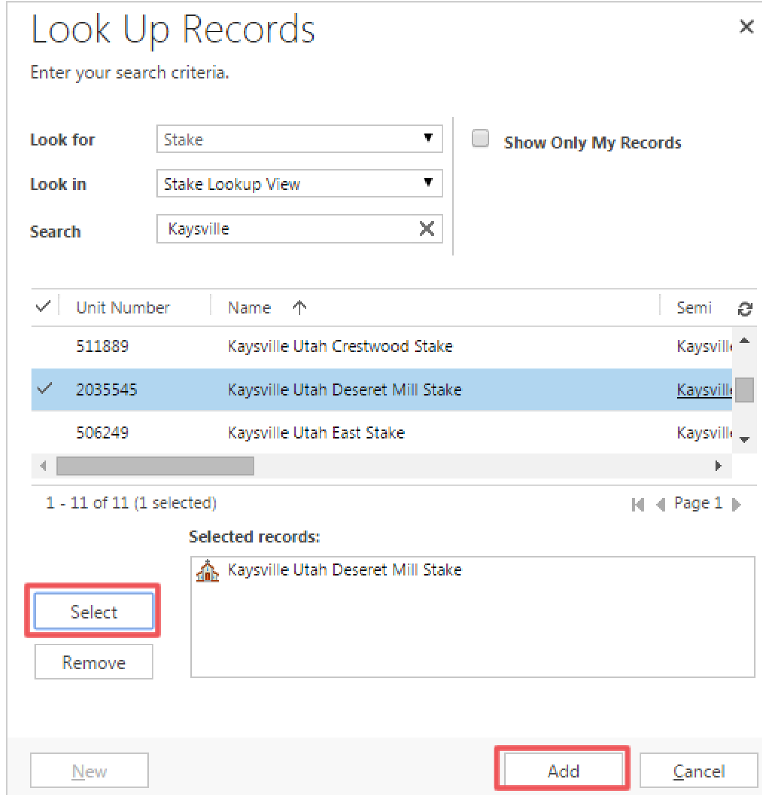


7. Click **Enter Value**, and type part of the name of the stake you want to find. Then click the **Search** button.

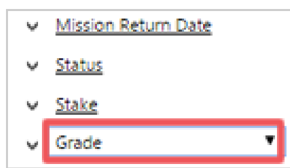


8. Click the stake you want to view to highlight the stake. Click **Select**, and then click **Add**.

   Note: If you want to view information for more than one stake, select all the desired stakes before clicking Add.

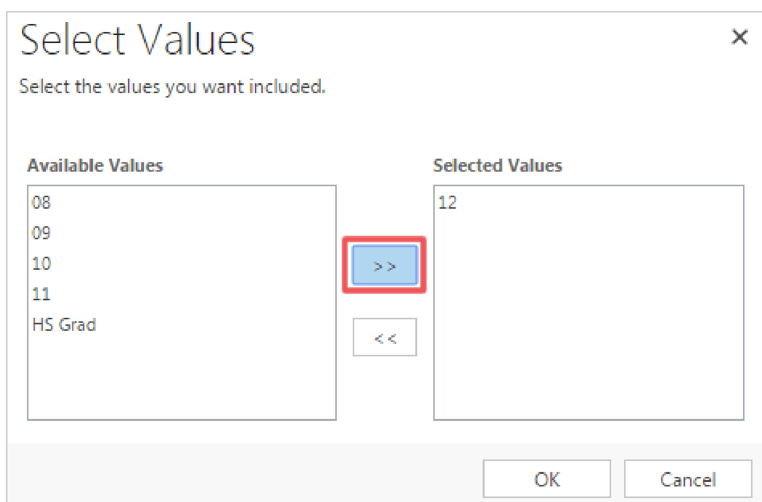


9. Below Stake, click **Select**, and select **Grade**.

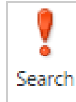


10. Click **Enter Value**, and click the button with **three dots**.

11. Click the grade number you want information about, such as **12**, to highlight it. Click the **right arrow** button to move it to the Selected Values list, and click **OK**.

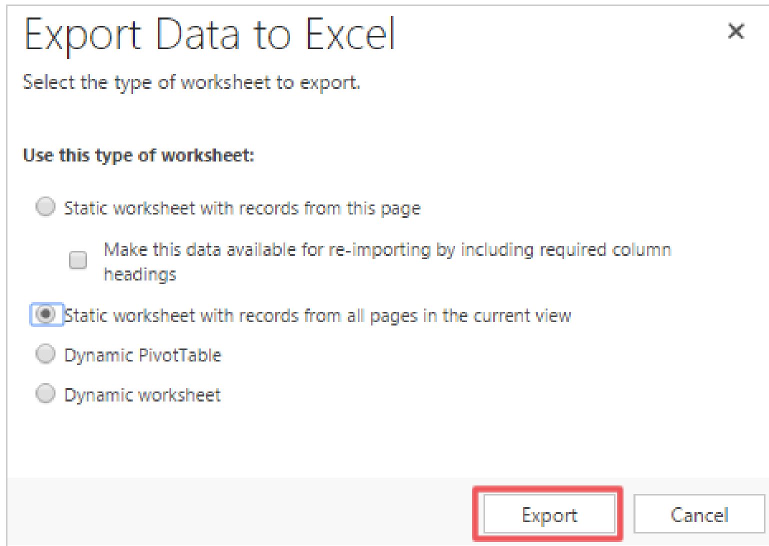


12. At the top of the Advanced Find screen, click **Search**. You now have a list of all the seniors in that stake.



13. Click **Export Students** to export the list.

14. After you click Export Students, select **Static worksheet with records from this page**. Or, if there is more than one page of data and this second option is shown, select **Static worksheet with records from all pages in the current view**. Then click **Export**.
15. Customize the report in Excel and print.



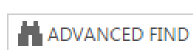
Use Advanced Find to Create a Report (Multiple Programs)

Use Advanced Find to create your own reports or to find records for an email list. There is a slight difference in how you use Advanced Find depending on whether you are over one program or multiple programs. If you are over several programs, you will need to use the Alignment Method, as explained in this section. *Note:* Since it is possible for a student to be in more than one program over time, student records are aligned with programs.

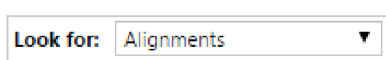
In this example, we will create a list of incoming ninth-grade students in a program.

1. At the top of any page, under Menu, click **Advanced Find**.

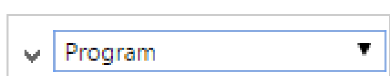
2. At the top of the Advanced Find screen, click **Advanced Find**.



3. In the Look for drop-down menu, select **Alignments**.



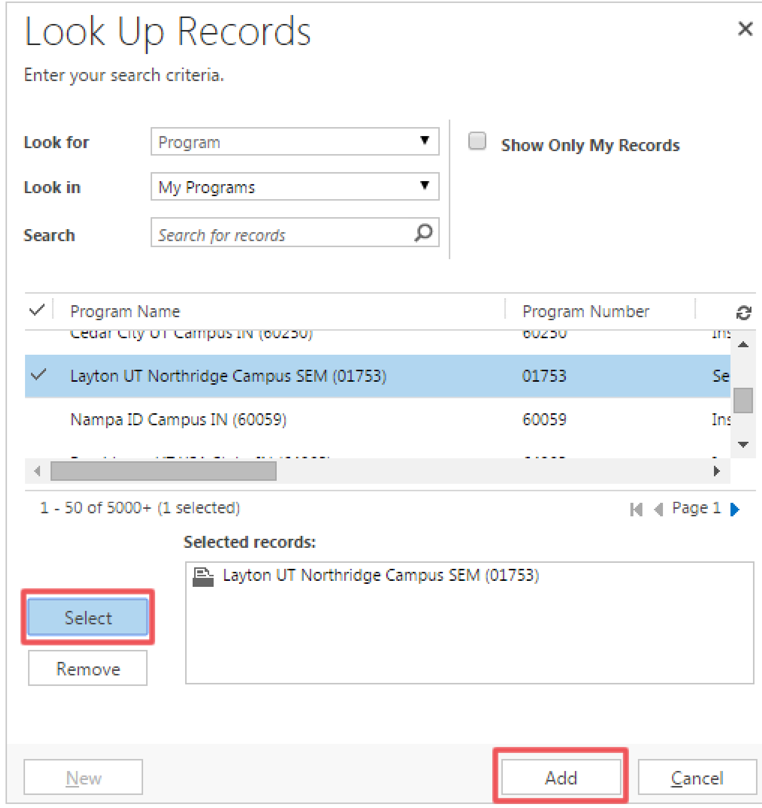
4. Click **Select**, and select **Program**.



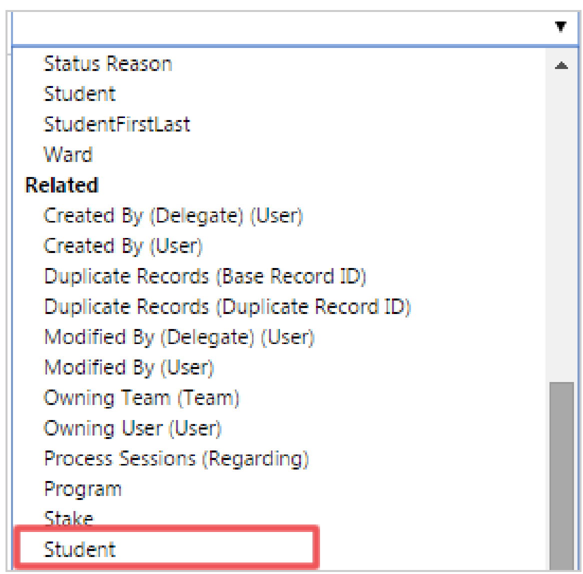
5. Click **Enter Value**, and then click the **Search** button.

6. Click the program you want to view to highlight the program, and click **Select**. Then click **Add**.

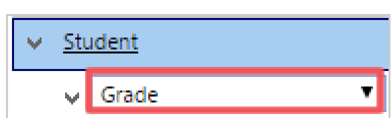
   Note: If you want to view information for more than one program, select all of the desired programs before clicking **Add**.



7. Click **Select**, and select **Student** under the Related section.

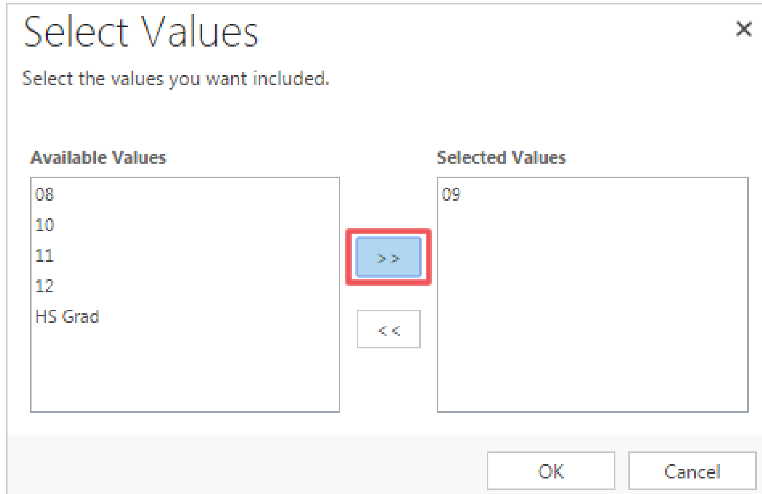


8. Under Student, click **Select**, and select **Grade**.



9. Click **Enter Value**, and click the button with **three dots**.

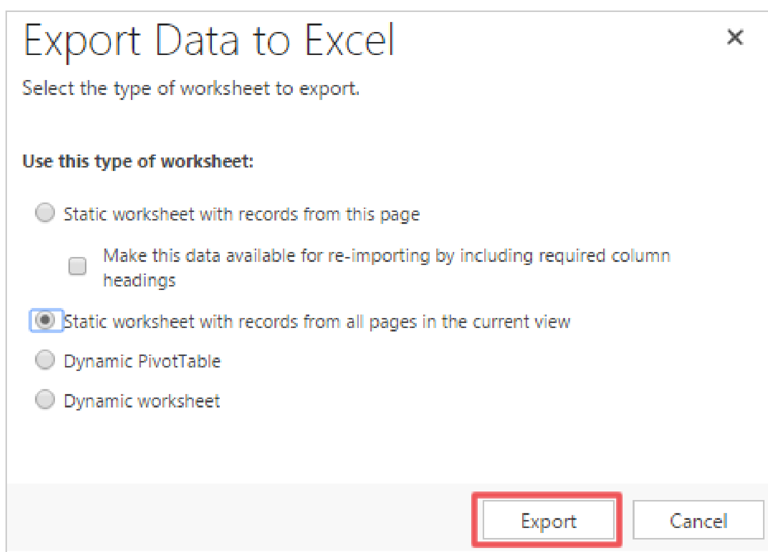
10. Click the grade number you want information about, such as **9**, to highlight it. Click the **right arrow** button to move it to the Selected Values list, and click **OK**.



11. At the top of the Advanced Find screen, click **Search**. You now have a list of all the ninth-grade students in that stake.

12. Click **Export Students** to export the list.

13. After you click Export Students, select **Static worksheet with records from this page**. Or, if there is more than one page of data and this second option is shown, select **Static worksheet with records from all pages in the current view** to export all of the names. Then click **Export**.
14. Customize and print the report in Excel.

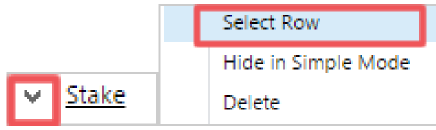


More with Advanced Find

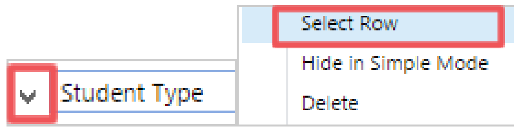
Using "Group And" and "Group Or"

Some Boolean-type searches are available in Advanced Find. You can select two or more criteria and group them as a "Group And" statement or "Group Or" statement. For example, in a specific stake you may want to view only the seminary students (Student Type = Seminary). In that case, you will want to use "Group And" when searching.

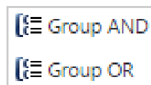
1. Click the arrow to the left of the first criteria, and click **Select Row**.



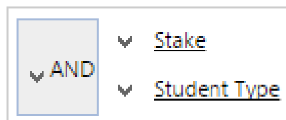
2. Click the arrow to the left of the second criteria, and click **Select Row**.



3. Click **Group AND**.



The word "AND" will appear to the left of both criteria.

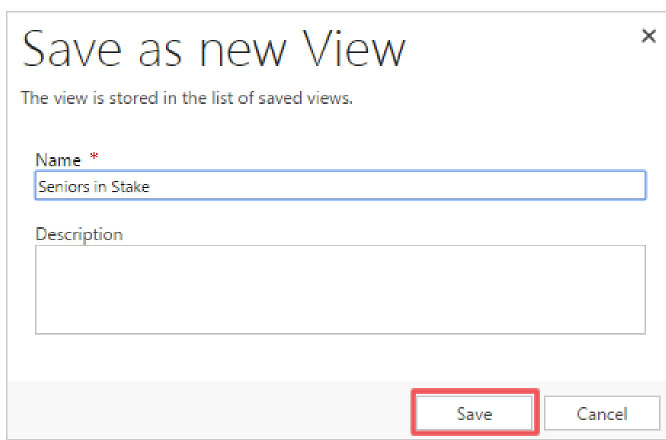


Saving and Reusing an Advanced Find Query

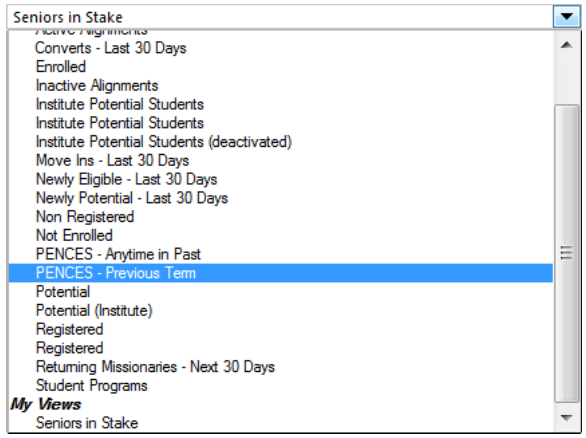
If you create a query in Advanced Find that you would like to reuse, you can save the query and reuse it at any time.

1. After selecting your search criteria, click **Save**.

2. Give your query a name, and click **Save**.



3. To reuse your query, go to **Use Saved View**, and click your query.

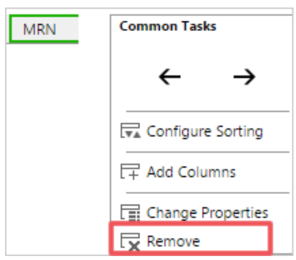


Editing Columns

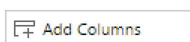
When you are creating a report, you can edit which columns you want to appear and in which order they appear before you run the report.

1. After selecting your search criteria, click **Edit Columns** at the top of the Advanced Find screen.

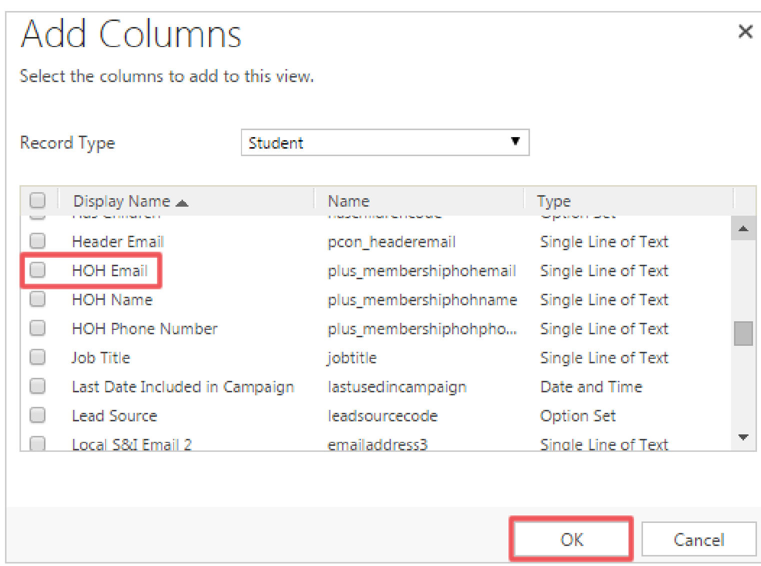
2. To delete a column, click a column header to highlight it, and click **Remove**.



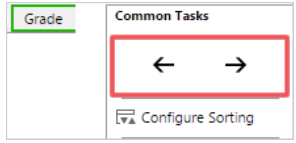
3. To add a column, click **Add Columns**.



4. Click the item you want to add, and click **OK**.



5. To move a column, click the column header to highlight it, and click the **left** or **right arrow** to move it.

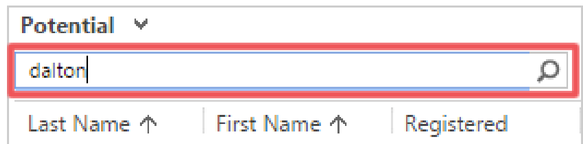


6. When you are finished, click **OK**.

Contact Students and Record Recruitment Efforts

Find a Student from a Program or Ward Page

1. From a Program or Ward page, type a student's first or last name into the search box, and click the **Search** button to find the student in the list.

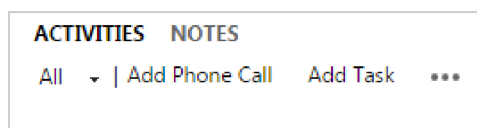
   Note: If you are not sure how to spell the student's name, use an asterisk (*) before or after your entry. For example, if you are looking for *Johnson* but you do not know if the name is spelled with an *o* or an *e*, you could type *Johns* and an asterisk (Johns*). This will display all names that start with *Johns*.

2. Double-click a student's name to view the student's information.

3. You will be able to see general, membership, contact, and enrollment information. Click **Contact Information** to view a student's address, phone number, and email.

4. To track communication activities, use the options under Activities or Notes.

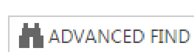
   

Find a Student from the Student Page

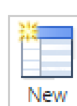
1. At the top of any page, under **Menu**, click **Students**.

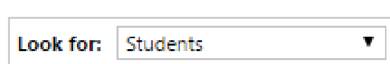
2. At the top of the Student page, click **Advanced Find**.

3. At the top of the Advanced Find screen, click **New**.

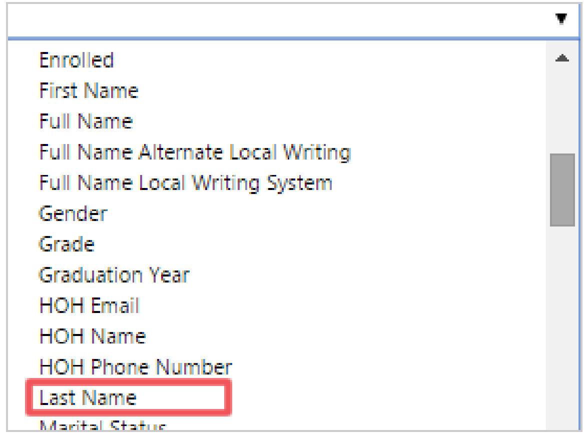
   

4. In the Look for drop-down menu, select **Stu-**

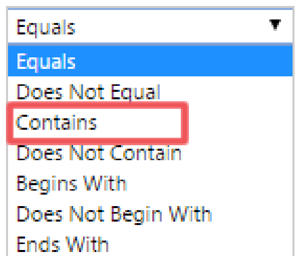
   

dents.

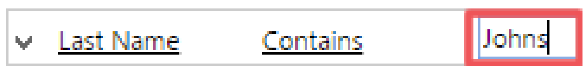
5. Click **Select**, and select **First Name** or **Last Name**.



6. Click **Equals**, and select **Contains**, **Begins with**, or **Ends with**, according to the part of the name you would like to search for.

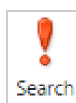


7. Click **Enter Text**, and type in the letters of the name you are searching for.



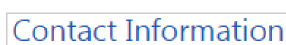
   Note: After entering a last name, you can click **Select** to enter a first name.

8. At the top of the Advanced Find screen, click **Search**.

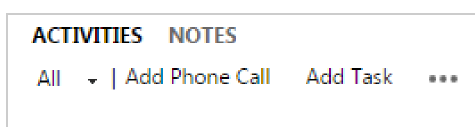


9. Double-click a student's name to view the student's information.

10. You will be able to see general, membership, contact, and enrollment information. Click **Contact Information** to view a student's address, phone number, and email.

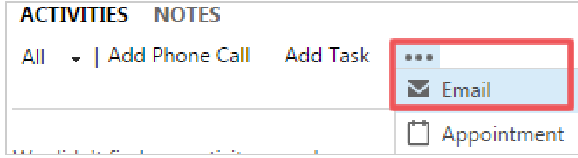


11. To track communication activities, use the options under Activities or Notes.



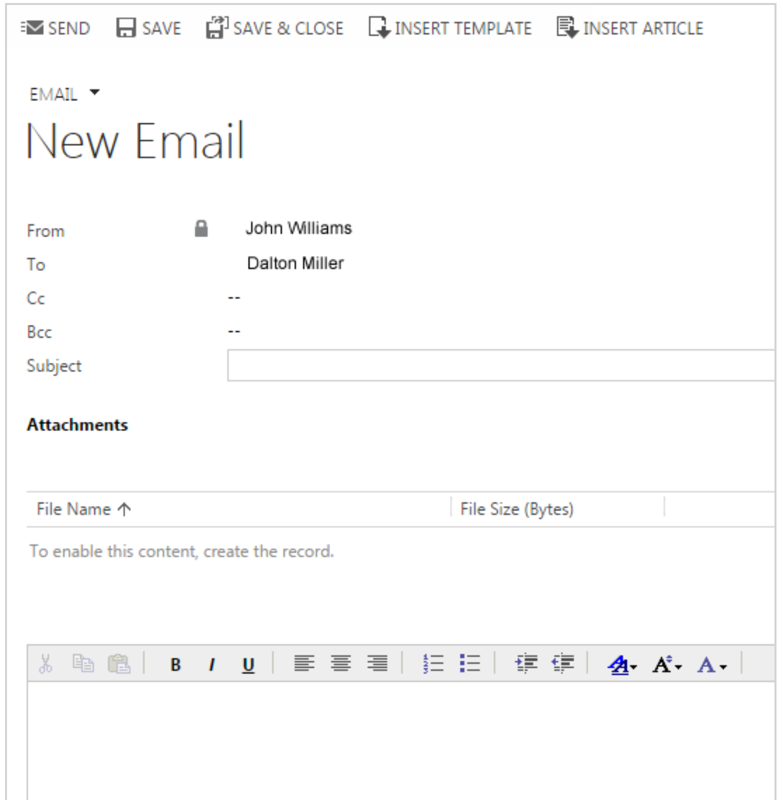
Email a Student

1. At the top of the Student page under Activities, click the **three dots** to the right of Add Task, and select **Email**.



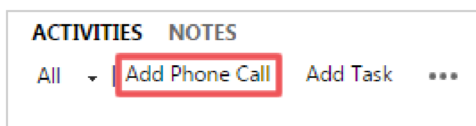
2. You can add a subject, attach a file, and draft a message. If you are not ready to send the email, you can click **Save & Close** and finish it later. Or, click **Send** to send it.

   Note: Sending an email in Microsoft Dynamics allows the system to save the conversation for future reference.The email will be sent to the primary customer relations management (CRM) email address listed in the student's record.

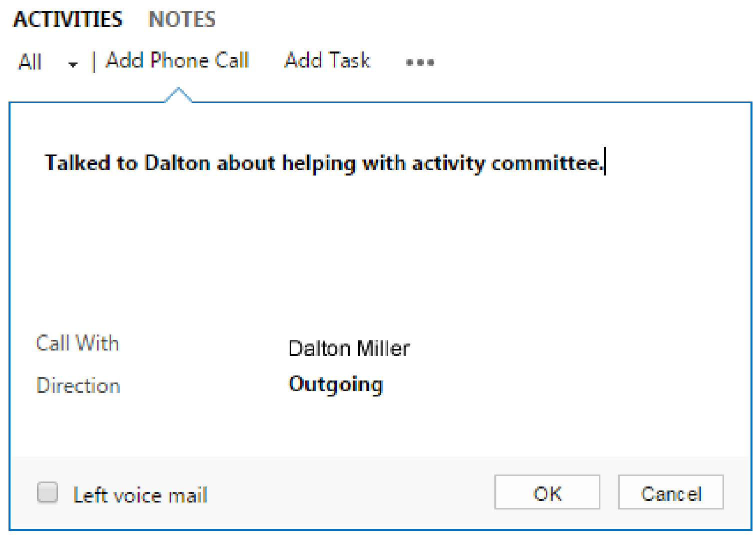


Keep Notes about a Phone Call

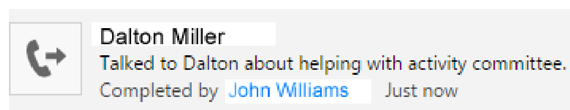
1. At the top of the Student page, under Activities, click **Add Phone Call**.



2. You can enter notes about the phone call or indicate that you left a voice message. Click **OK** when you are finished taking notes.

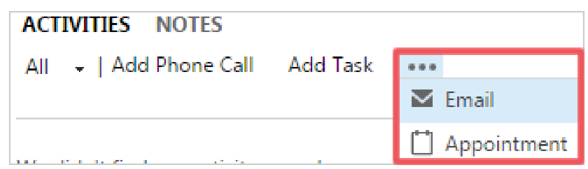


Note: You can reference these notes later.

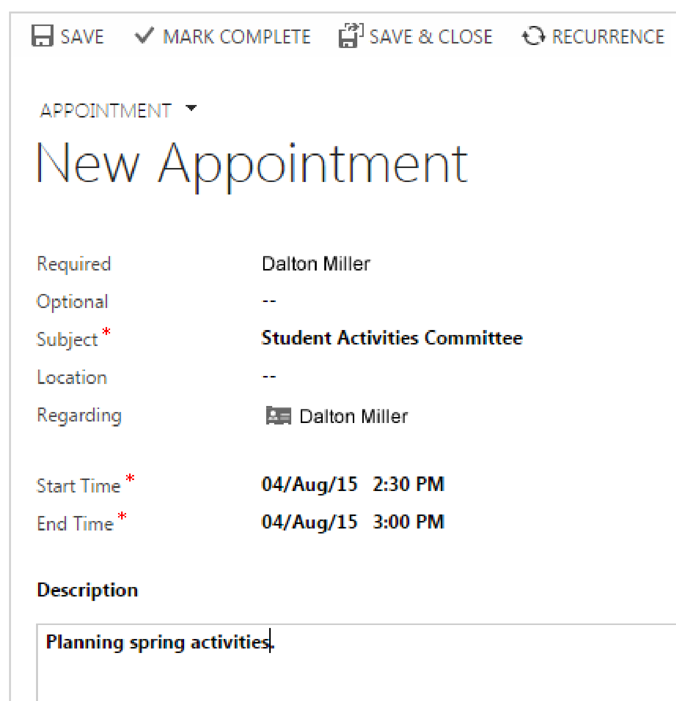


Keep Track of Appointments

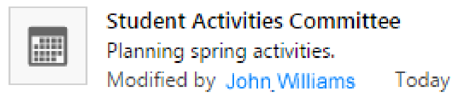
1. At the top, on the right side under Activities, click the **three dots** to the right of Add Task, and select **Appointment**.



2. You can add other attendees, a subject, location, start and end time, and description. At the top, click **Save and Close** when you are finished recording your appointment.

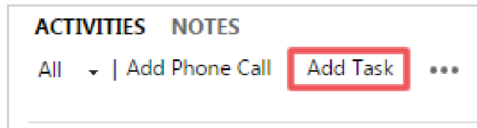


Note: You can view appointments in Microsoft Dynamics, and they can also appear in your Outlook calendar (if you have Outlook Client installed).

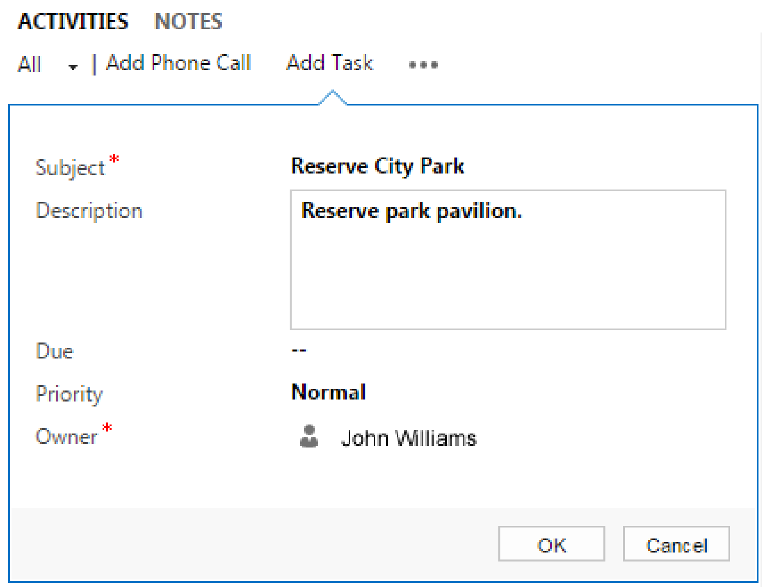


Create a Task

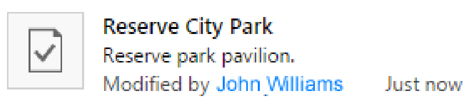
1. At the top, on the right side under Activities, click Add Task.



2. You can enter a subject and description of what you need to do as well as a due date. When you finish recording this information, click OK.

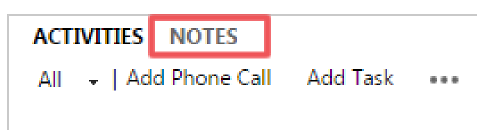


Note: You can view these tasks in Microsoft Dynamics, and they can also appear in your Outlook list of tasks (if you have Outlook Client installed).

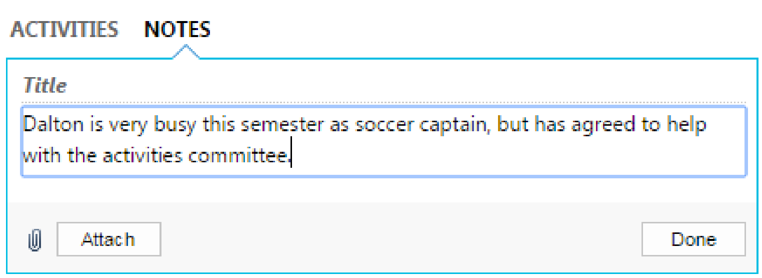


Create a Note

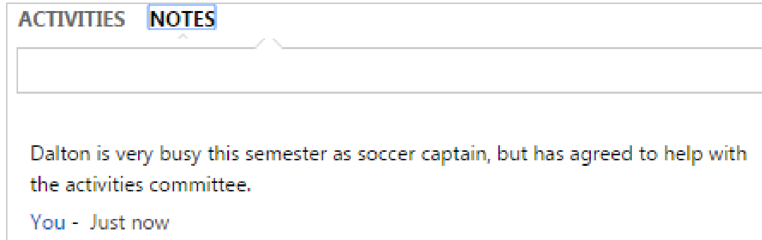
1. At the top of the Student page, on the right side, click Notes.



2. Enter a note or attach a document, and click Done. This is a useful way to attach a copy of a seminary registration form.



Note: You can reference these notes later.



Create an Email List for a Ward, Stake, or Program

To send emails to all students in a ward, stake, or program, you must first create a marketing email list.

1. At the top of the page, under **Menu**, click **the arrow** at the top right, and then click **Marketing Lists**.

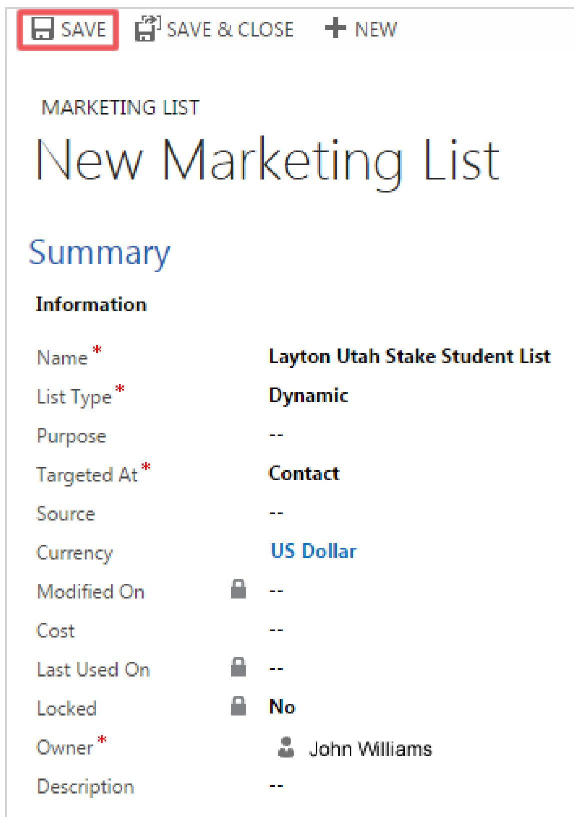
2. At the top of the Marketing Lists page, click **New**.

3. Enter a name for your list, such as "Layton Utah Stake Student List."
4. Select the List Type.

   Static means the list will not change after you create it.

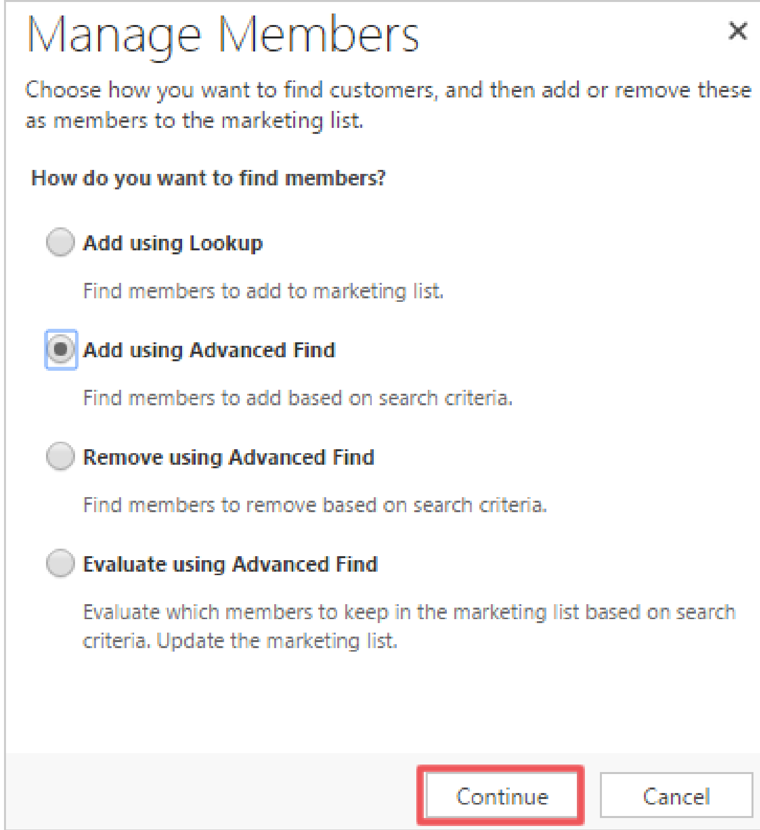
   Dynamic means the list will be updated based on your criteria. When students move in or out of the stake, they will automatically be added to or removed from the list. This prevents emails being sent to students who should no longer be receiving them.

5. Set the Targeted At field to **Contact**.
6. Keep the Owner as yourself.
7. Add a description of this list, if desired.
8. At the top, click **Save**.



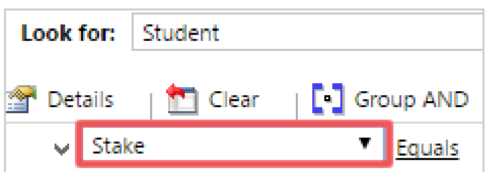
9. At the top, click **Manage Members**.

10. The Manage Members screen will appear. Click Add using Advanced Find, and then click Continue.



11. Click Select, and select Stake.

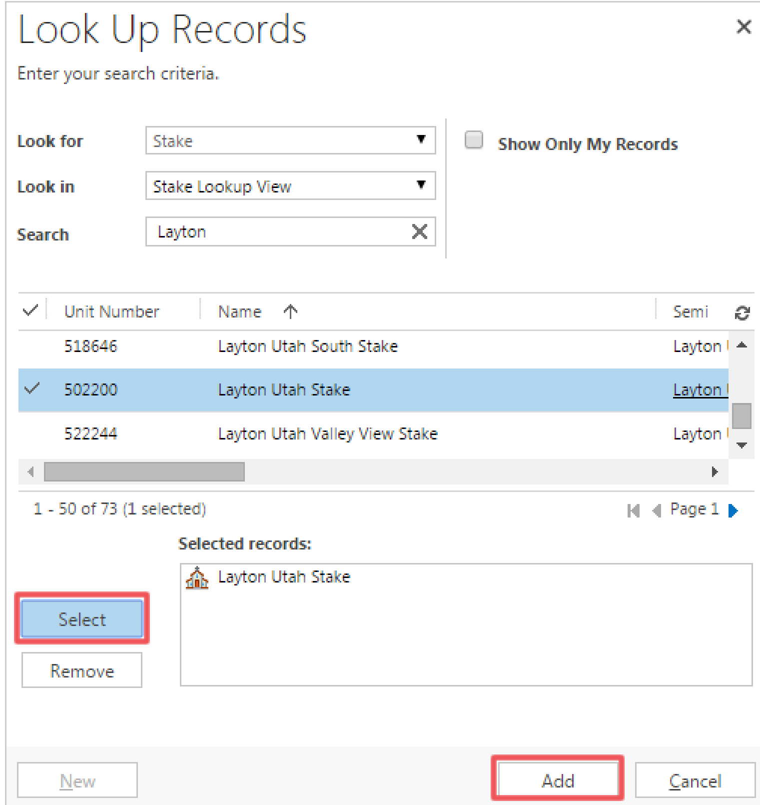
    Note: If you are creating an email list for a ward, select Ward.



12. Click Enter Value, and type part of the name of the stake you wish to collect email addresses for. Then click the Search button.

13. Click the stake you want information about to highlight the stake, and click **Select**. Then click **Add**.

    Note: If you want to collect information about more than one stake, select each stake in the program before you click **Add**.

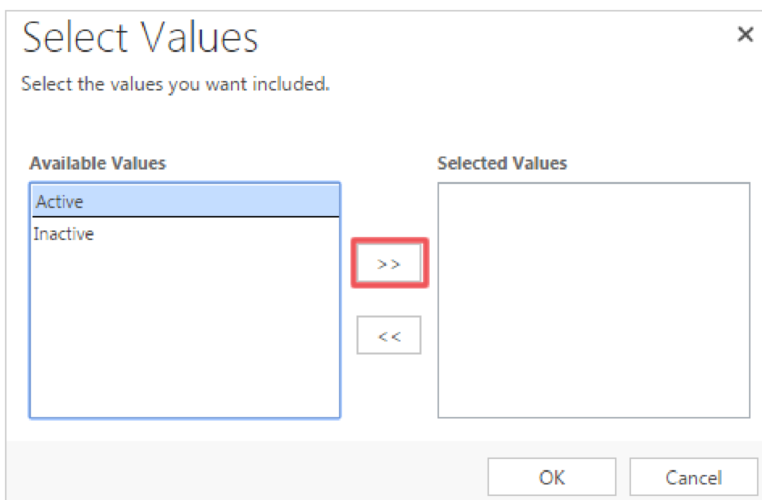


14. Click **Select**, and **select Status**.

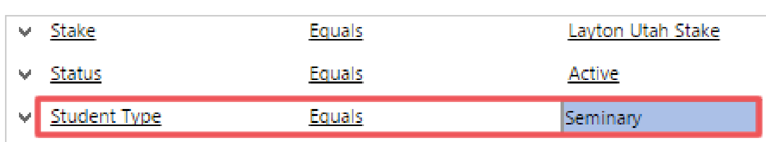
15. Click **Enter Value**, and then click the box with **three dots**.

16. Click **Active**, and then click the **right arrow** button to move it to the Selected Values list. Then click **OK**.

    Note: Clicking **Active** and moving it to the Selected Values list ensures emails are sent to active students only.



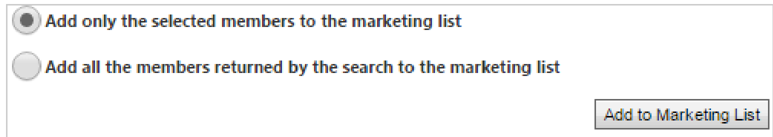
17. If desired, select **Student Type**, and set it to **Seminary** or **Institute**.



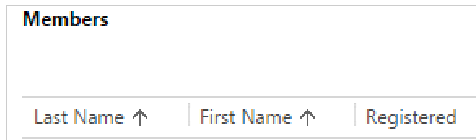
18. Click **Find**.

19. When the list of students appears, click **Use Query** at the bottom left.

Note: If you are creating a static list rather than a dynamic list, you will be able to select certain students to be on the list or choose to add all students. Then click **Add to Marketing List**.



Note: All of the students you found in your query will be listed under Members. You can edit this list at any time.

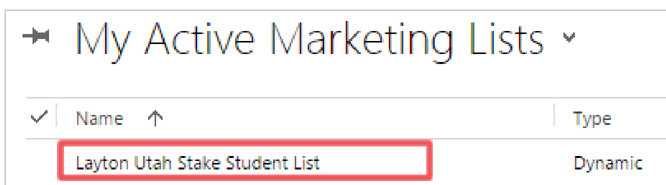


Send an Email to a Specific List of Students

Use this method to send a one-time email to a list of students. In Microsoft Dynamics, this is called a Quick Campaign.

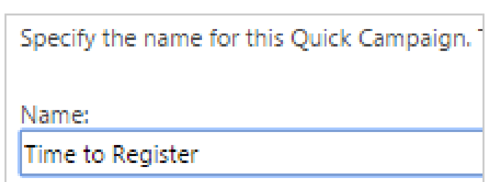
1. At the top of the page, under **Menu**, click the arrow at the top right, and then click **Marketing Lists**.

2. Click the marketing list you want to send the email to.

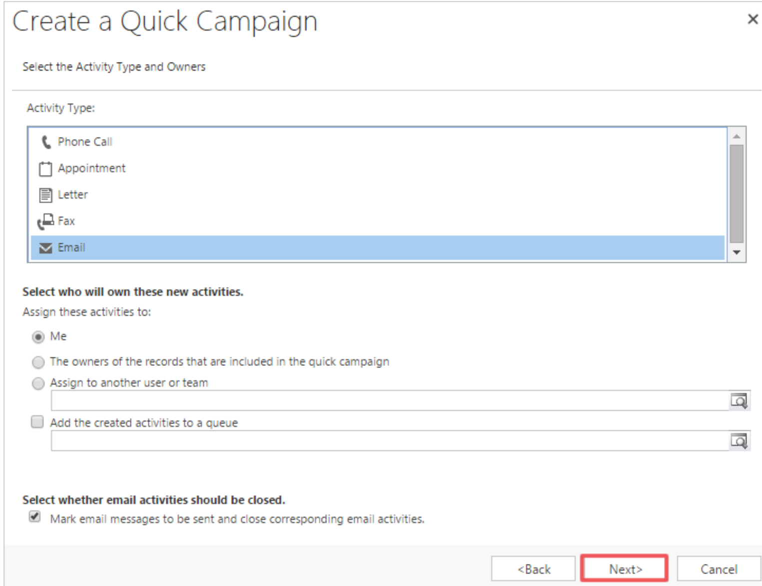


3. On the right, next to Quick Campaigns, click the **plus** (+) sign.

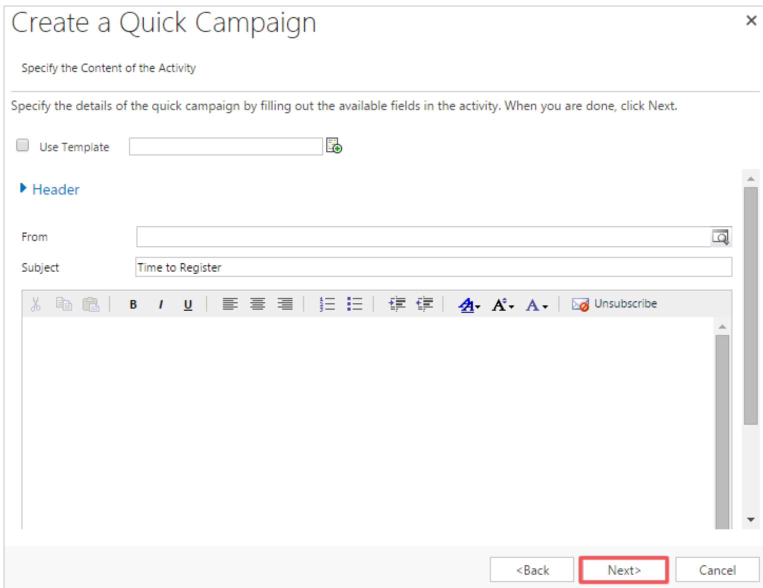
4. This will take you to the Quick Campaign Wizard welcome page. Click **Next**.
5. Enter a name for the Quick Campaign, and click **Next**.



6. For the Activity Type, select **Email**.
7. Under Select who will own these new activities, select **Me**.
8. Click the check box **Mark email messages to be sent and close corresponding email activities**.
9. Click **Next**.



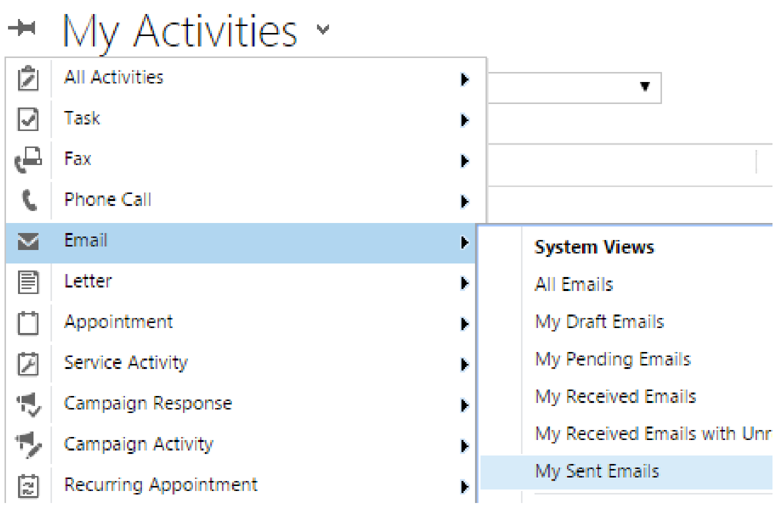
10. Enter a subject and message for the email. Click **Next**.
11. Click **Create**. The emails will be sent to all members in the list.



12. To confirm the emails were sent, under Menu, select **Activities**.

13. Under My Activities, select **Email**, and then select **My Sent Emails**.

    The emails you have sent will be listed.



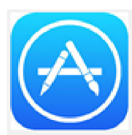
Using the App

Download and Set Up the Microsoft Dynamics App

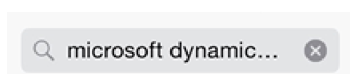
The iPad app version of Microsoft Dynamics allows you to view information about programs, stakes, wards, and students for contacting and recruiting, similar to the web version. You can track communication notes with the iPad version, but you cannot download and print reports.

Note: There is an iPhone version, but you can only view student contact information. To find and view student contact information, use the Programs, Stakes, Wards, or Students options from the menu. There are no statistics, reports, or potential student views on the iPhone version.

1. From the Home screen of your iPad or iPhone, select the **Apple App Store** application.

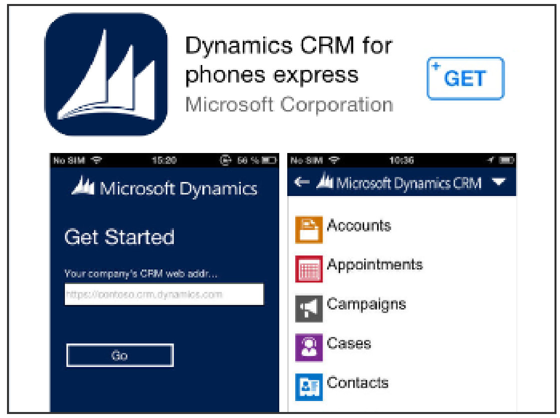


2. Type **Microsoft Dynamics CRM** into the search box, and then tap **Search**. Tap the **Microsoft Dynamics CRM** app for iPads or the **Dynamics CRM for phones express** app for iPhones.



3. Tap **Get** next to the app name to download the app.

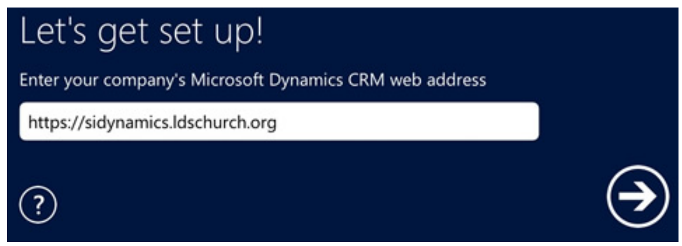
For iPad



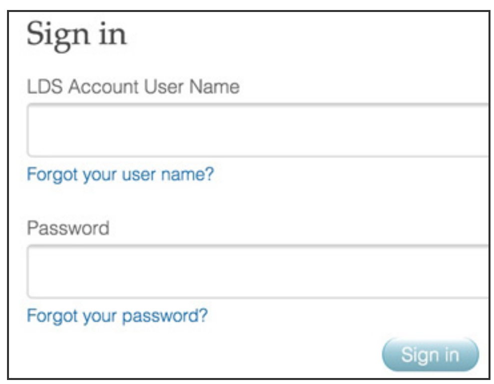
For iPhone

4. After the app has finished downloading, tap the **Microsoft Dynamics icon** on your tablet or phone.

5. Enter **https://sidynamics.ldschurch.org**, and then tap the **Go arrow** on the right.



6. After you sign in with your LDS account user name and password, the Microsoft Dynamics dashboard will appear.



Note: To use the app later, tap the Microsoft Dynamics app icon on your iPad or iPhone and sign in with your LDS account.

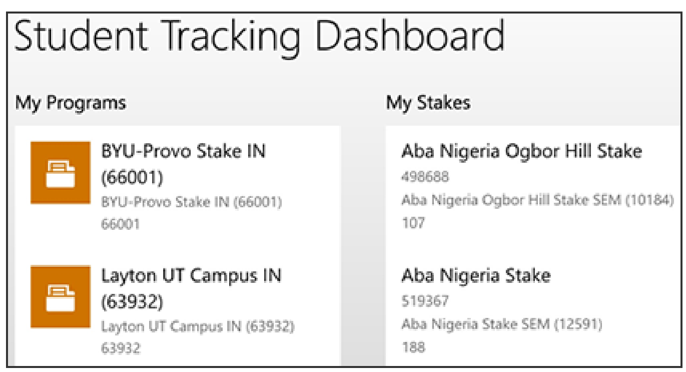
View Students in a Program

The following views are available on the iPad app for programs. To learn how to access a view, see the instructions following the list of views.

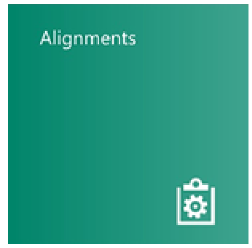
View	What you see
Active Alignments	Students who are enrolled or have attended a class
Converts	Students baptized within the last 90 days
Enrolled	Students who have registered for and attended a seminary or institute class, as recor-ded in WISE
Inactive Alignments	Students who are not enrolled or have not yet attended a class
Missionaries	Students eligible for institute who have returned within the last 90 days
Move-Ins	Students who have moved into the area within the last 90 days
New Potential	Students who have become eligible for seminary or institute by either moving to a new school or from one stake to another within the last 90 days
Newly Eligible	Students who have completed eighth grade (eligible for seminary) or graduated high school (eligible for institute) within the last 90 days
Non-Registered	Students who have not registered
Not Enrolled	Students who have registered but have not yet attended a class
PENCES—Anytime	Students who were previously enrolled at any time but are not currently enrolled
PENCES—Previous Term	Students who were enrolled in the previous term but are not currently enrolled
Potential	Campus programs: Students attending a given school who are potential students for the program that the school supports Stake programs: Students who are potential students for the program that is agent to the stake in which they live
Registered	Students who are registered
Returning Missionaries—Next 90 Days	Students eligible for institute who will return from a mission within the next 90 days (based on scheduled return date)
Student Programs	The seminary or institute program students attend

For this example we'll find students who are not enrolled.

1. From the dashboard, tap the program you want to view. *Note:* Only programs you are over are listed.



2. On the Program page, tap **Alignments**.



3. On the bottom right, tap the **Options** menu, and then tap **Select View**.

4. Tap the view you want, such as **Not Enrolled**.

View Students in a Stake

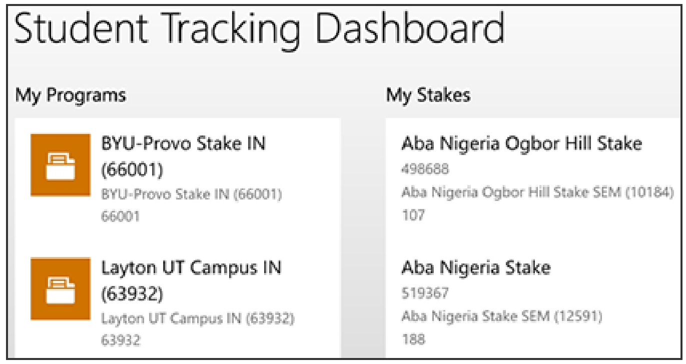
The following views are available on the iPad app for stakes. All views available are either of seminary students only or institute students only. To learn how to access a view, see the instructions following the list of views.

View	What you see
Converts	Students baptized within the last 90 days
Enrolled	Students who have registered for and attended a seminary or institute class, as recorded in WISE
Move-Ins	Students who have moved into the area within the last 90 days
Not Enrolled	Students who have registered but have not yet attended a class
Not Registered	Students who have not registered
Not Registered, Has Released Time, Enrolled	Seminary students who are not registered, have released-time seminary in their school schedule, and are enrolled
Potential	Students in a given stake who meet the age requirement and who have completed eighth grade (potential for seminary) or graduated high school (potential for institute), according to Church membership records
Registered	Students who are registered
Registered, Has Released Time, Enrolled	Seminary students who are registered, have released-time seminary in their school schedule, and are enrolled
Registered, Has Released Time, Not Enrolled	Seminary students who are registered, have released-time seminary in their school schedule, and are not enrolled
Registered, No Released Time, Enrolled	Seminary students who are registered, do not have released-time seminary in their school schedule, and are enrolled
Registered, No Released Time, Not Enrolled	Seminary students who are registered, do not have released-time seminary in their school schedule, and are not enrolled
Registered, Not Enrolled	Students who have registered but have not attended a class, as recorded in WISE
Released-Time Students	This is to be used by administrators to update in bulk released times for students

View	What you see
Export View	
Returning Missionaries—Next 90 Days	Students eligible for institute who will return from a mission within the next 90 days (based on scheduled return date)

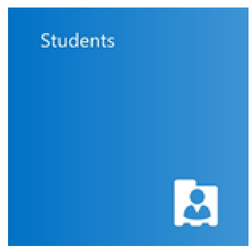
For this example we'll find potential students.

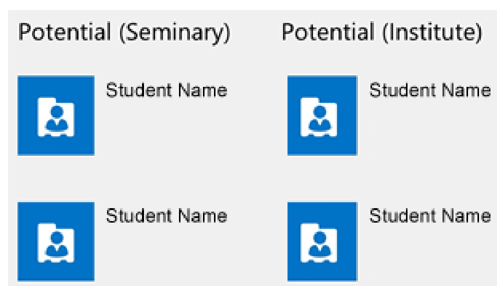
1. On the dashboard, tap the stake you want to view. *Note:* Only stakes you are over are listed.



2. On the Stake page, tap **Students**.

   You can also quickly view a list of potential students by swiping across to the lists of potential students. Tap **Potential (Seminary)** or **Potential (Institute)** to view details.





3. On the bottom right, tap the **Options** menu, and then tap **Select View**.

4. Tap **Potential**.

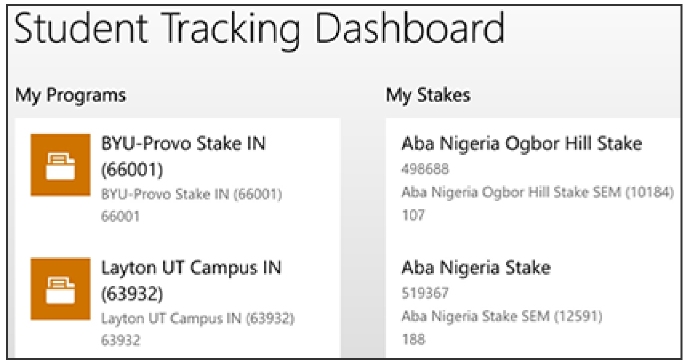
View Students in a Ward

The following views are available on the iPad app for wards. All views available are either of seminary students only or institute students only. See the instructions following the list of views to learn how to access these views.

View	What you see
Converts	Students baptized within the last 90 days
Enrolled	Students who have registered for and attended a seminary or institute class, as recorded in WISE
Move-Ins	Students who have moved into the area within the last 90 days
Not Enrolled	Students who have registered but have not yet attended a class
Not Registered	Students who have not registered
Not Registered, Has Released Time, Enrolled	Seminary students who are not registered, have released-time seminary in their school schedule, and are enrolled
Potential	Students in a given stake who meet the age requirement and who have completed eighth grade (potential for seminary) or graduated high school (potential for institute), according to Church membership records
Registered	Students who are registered
Registered, Has Released Time, Enrolled	Seminary students who are registered, have released-time seminary in their school schedule, and are enrolled
Registered, Has Released Time, Not Enrolled	Seminary students who are registered, have released-time seminary in their school schedule, and are not enrolled
Registered, No Released Time, Enrolled	Seminary students who are registered, do not have released-time seminary in their school schedule, and are enrolled
Registered, No Released Time, Not Enrolled	Seminary students who are registered, do not have released-time seminary in their school schedule, and are not enrolled
Registered, Not Enrolled	Students who have registered but have not attended a class, as recorded in WISE
Released-Time Students Export View	This is to be used by administrators to update in bulk released times for students
Returning Missionaries—Next 90 Days	Students eligible for institute who will return from a mission within the next 90 days (based on scheduled return date)

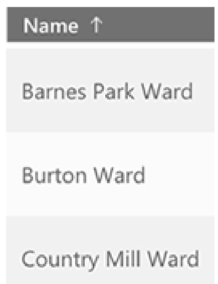
For this example we'll find students who are registered but not enrolled.

1. From the dashboard, tap the stake you want to view. *Note:* Only stakes you are over are listed.



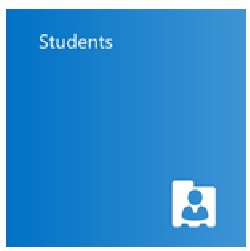
2. On the Stake page, tap **Wards**.

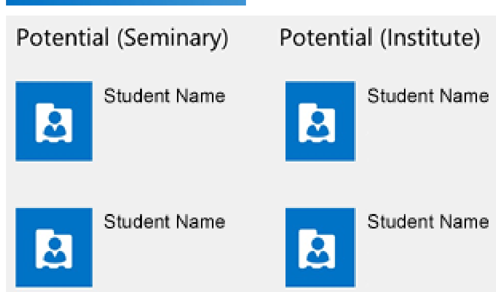
3. Tap the name of the ward you want to view.



4. On the Ward page, tap **Students**.

   You can also quickly view a list of potential students by swiping across to the list of potential students. Tap **Potential (Seminary)** or **Potential (Institute)** to view details.





5. On the bottom right, tap the **Options** menu, and then tap **Select View**.

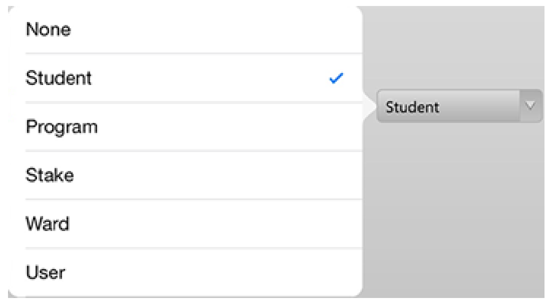
6. Tap the view you want, such as **Registered not Enrolled**.

Find a Student

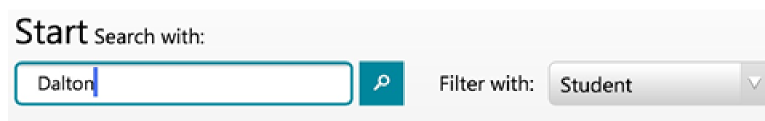
There are several ways to find students using the iPad app. When you are viewing lists of students from a Program, Stake, or Ward page, tap a student's name in the list to view his or her information. For this example we'll search for a student.

1. At the top right corner of the dashboard or the Program, Stake, or Ward page, tap the **Search icon**.

2. Tap the **Filter with** list, and select **Student**. Notice that you can also search for a program, stake, or ward.

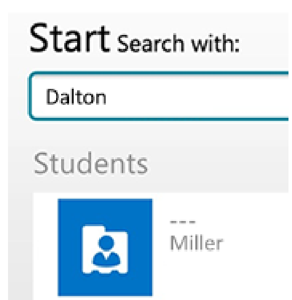


3. Type the student's first or last name, and tap the **Search icon**.



Note: If you are not sure how to spell the student's name, put an asterisk (*) before or after your entry. For example, if you are looking for *Johnson* but do not know if the name is spelled with an *o* or an *e,* you could type *Johns* and an asterisk (Johns*). This will display all names that start with *Johns*.

4. From the results displayed, tap the student's name. You can now view information about the student. To track communication activities, use the options under Activities or Notes.



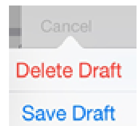
Email a Student

Using the app, you can send an email message to a student, but you cannot add attachments. Sending an email in Microsoft Dynamics allows the system to save the conversation for future reference.

1. In the Relationship column on the Student page, tap the **Email icon**. This will open a new email message.

2. Enter a subject and message. Then tap **Send**.

Note: To save a draft, tap **Cancel**, and then tap **Save Draft**.



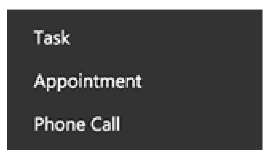
Keep Notes About a Phone Call

You can keep notes about a phone call on the app.

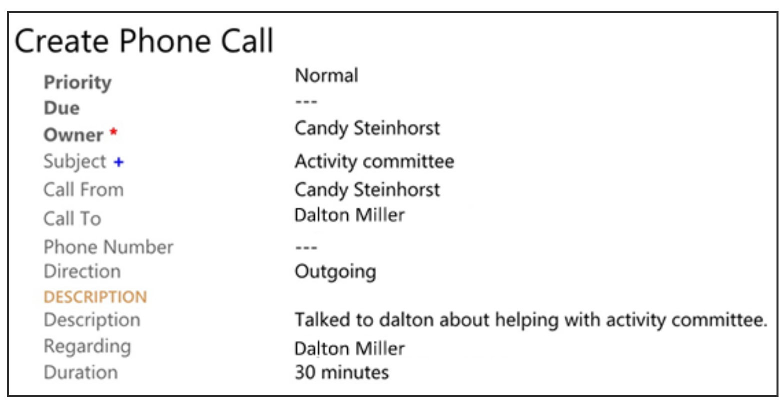
Note: There is a phone button below the email button that will start a phone call using the Skype app. However, you must install the Skype app to use this feature, and Skype phone calls are not free.

1. On the Student page, tap the **plus sign** (+) next to All Activities.

2. Tap **Phone Call**.

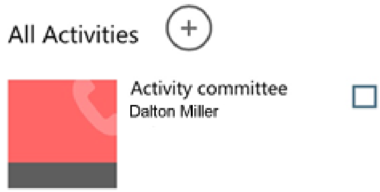


3. Tap a field, such as Subject or Description, to add details.



4. When you are finished, tap **Save**.

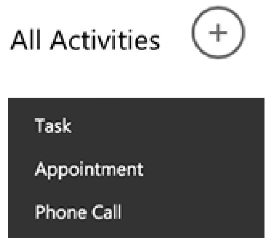
Note: You can reference these notes under All Activities. Tap a phone call note to view or edit it. Tap the **Options** menu, and select the option to delete the note.



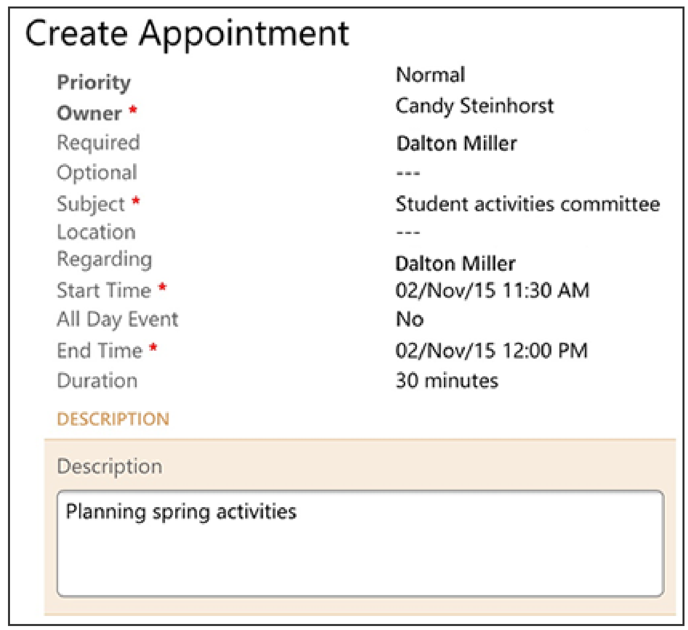
Keep Track of Appointments

You can track appointments on the app.

1. On the Student page, tap the **plus sign** (+) next to All Activities.

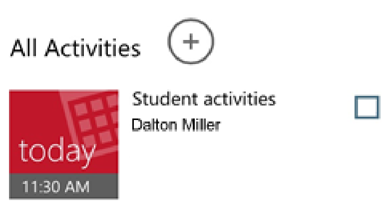


2. Tap **Appointment**.
3. Enter a subject. You can add other attendees by tapping **Optional** and changing the filter to Student. You can also set a location, start and end time, and a description.



4. When you are finished, tap **Save**.

Note: You can view appointments under All Activities. Tap an appointment to view or edit the details. Tap the **Options** menu to mark an appointment as complete or delete an appointment.

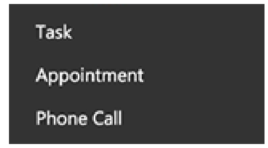


Create a Task

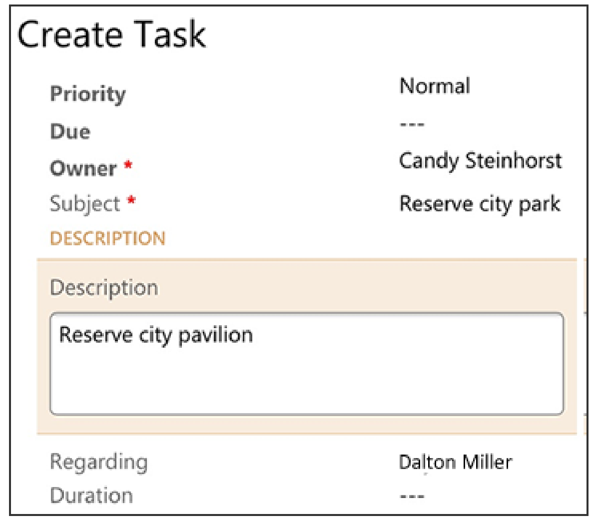
You can add tasks on the app.

1. On the Student page, tap the plus sign (+) next to All Activities.

2. Tap Task.

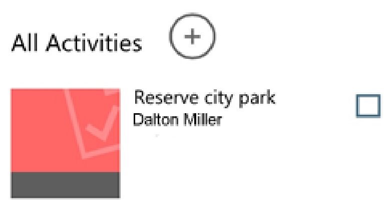


3. Tap a field, such as Subject or Description, to add details.



4. When you are finished, tap Save.

Note: You can view tasks under All Activities. Tap a task to view or edit details. Tap the Options menu to mark a task as complete or delete a task.

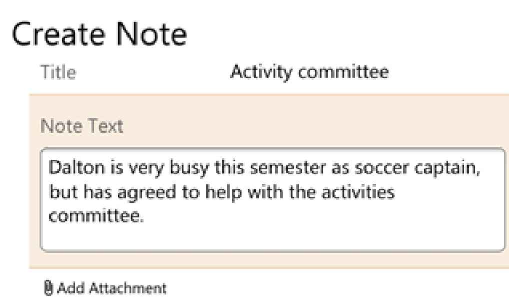


Create a Note

You can add notes about students on the app.

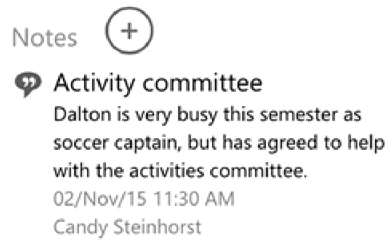
1. On the Student page, tap the plus sign (+) next to Notes.

2. Enter a note or attach a document. This is a useful way to attach a copy of a seminary registration form.



3. When you are finished, tap **Save**.

Note: You can reference these notes later. Touch and hold on the note to open the options to edit or delete it.



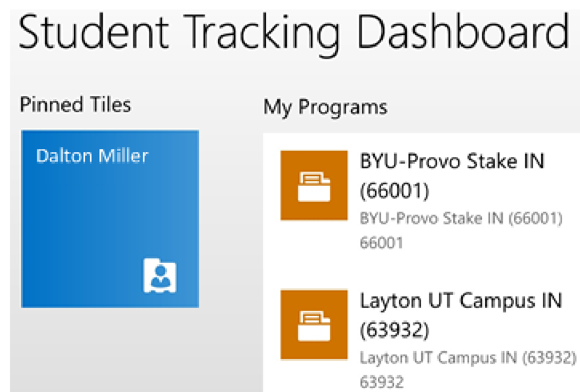
Pin a Student to the Dashboard

Using the app, you can pin a student to the dashboard to view his or her information quickly.

1. At the bottom right of the Student page for the student, tap the **Options** menu, and then tap **Pin to Dashboard**.

2. Tap the **Home icon** to return to the dashboard. A tile icon with the student's name will be listed.

3. To view or track information about a student, tap the student's name on the dashboard to go to the Student page.



Note: To unpin a student from the dashboard, tap the **Options** menu on the Student page, and then tap **Unpin from Dashboard**.

Frequently Asked Questions

Where does the information in Dynamics come from?

The information in Microsoft Dynamics comes from several sources:

- Member and Leader Services (MLS): A database for membership records, managed by ward and stake clerks and leaders.

- Worldwide Institute and Seminary Enrollment (WISE): A database for student records, managed by seminary and institute teachers and administrators.
- Church Directory of Leaders (CDOL): A directory of Church leaders, managed by Church clerks, leaders, and administrators.

Who is included or excluded in Microsoft Dynamics?

- Only baptized members are listed.
- While the database includes all students, you are able to view students in your current assignment only.
- Student assignment is based on membership records. It is possible for a student to move into your area and not appear on your lists if their membership records are still in the old area.

When is the data updated?

Microsoft Dynamics is refreshed every night, with the goal of eventually being real-time.

If I see an error, how do I fix it?

If you see an error, you will need to correct it in the appropriate source. For example:

- If a student's date of birth or baptism date is incorrect, contact their ward clerk to fix the information in Member and Leader Services (MLS).
- If a student's name, address, or enrollment status is incorrect, fix it in Worldwide Institute and Seminary Enrollment (WISE).

Which browser is best to use Microsoft Dynamics?

You can view data in any browser. Some features may not work in older browsers. The print button only works in Internet Explorer.

With whom can I share data?

There are many instances when you may be asked to share data with priesthood leaders, other leaders, and teachers. Please remember that much of the data in Microsoft Dynamics is considered confidential. Confidential information includes any information relating to the Church, its members and leaders, General Authorities or Church organizations which is not generally known or readily available to the public. This includes:

- Personal information (such as name, address, phone number, date of birth, baptism date, confirmation date, membership record number) about members, non-members, students, faculty, and staff.
- Contact information for priesthood leaders, General Authorities, or Church organizations.
- Church financial information.

As part of your employee obligations, you agreed to:

- Use Confidential Information only for approved business purposes.
- Never browse Confidential Information out of curiosity or to look up information for your personal use.
- Release Confidential Information only to priesthood leaders or General Authorities as it pertains to their stewardship and verify the identity of a priesthood leader prior to releasing the data.
- Not e-mail any Confidential Information to or from your personal e-mail address or account.
- Not release any Confidential Information to unauthorized individuals or entities for any reason.

- Upon the Church's request, or at the conclusion of your Church employment, promptly return all materials in your possession or control that contain Confidential Information.

To review data privacy policies, see the [Data Privacy Statement] in the Church's Policy Point.

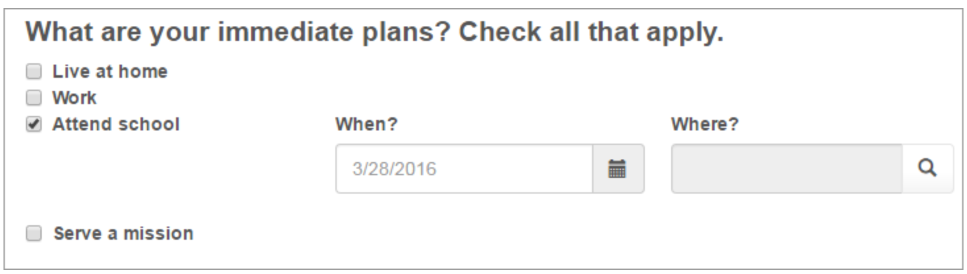
When generating reports for leaders and teachers, delete all non-essential information and only include student information that is part of their responsibility.

How is the seminary graduates "What's Next" form used?

Seminary graduates will now be invited to fill out an online What's Next form at lds.org/si/institute/whats-next. After signing in with their LDS Account, they click a link to fill out a form. Basic contact information from their membership record is displayed. They can add an alternate phone number and email. To correct contact information, they can 1) sign in on LDS.org and, under Account Settings, edit their email and mobile phone number, or 2) talk to their ward clerk.

At the bottom of the form, they can indicate their plans for the immediate future. Plans include:

- **Live at home**. This option lists them as a potential institute student in their home stake.
- **Work**. This option lists them as a potential institute student in their home stake.
- **Attend school**. This option lists them as a potential institute student at a school or city for the designated date. They can click the **Search** icon to search for a school by name, city, or state.
- **Serve a mission**. This option lists them as a potential institute student in their home stake until the selected starting date.



The options they chose and any additional contact information is displayed in Dynamics on their Student Information page under What's Next? They will also be added to the appropriate New Potential list for institute students.

Microsoft Dynamics Definitions

Activities: A record of tasks, phone conversations, email messages, and appointment notes you can enter and review for each student. When you add a note, you can also attach files, such as a scanned registration form.

Advanced Find: A way to search the database using your own criteria to create a report or gather emails for an email list.

Campaign: An activity that leads to a goal. There are two types of campaigns, 1) a quick campaign to track emails only, and 2) a standard campaign where you can track email messages sent to a group of students, phone calls, mailed flyers, or event plans.

Current Year Statistics: The statistics for the current school year. When you close the year in WISE, next year statistics move to the current year statistics.

Dashboard: A page that displays several lists or charts together. You can create your own customized dashboard.

Enrolled: Students who have attended a seminary or institute class, as indicated in WISE. It is possible for students to be enrolled and not registered.

Marketing List: A page in Dynamics where you can create and save email lists for sending messages to all students in a ward, stake, or program at once.

New Convert: A potential student who was recently baptized (listed for 30 days).

New Eligible: Students who have recently completed 8th grade (eligible for seminary) or recently graduated from high school (eligible for institute) (listed for 30 days).

New Move-ins: Individuals who have recently moved into the area (listed for 30 days).

PENCES: Previously enrolled but not currently enrolled students.

Potential: Individuals who are eligible for seminary or institute but have not registered or not enrolled.

Program: The wards and stakes that make up an area managed by a seminary principal, institute or region director, or coordinator.

Registered: Students who are registered in WISE, either using the online registration, or a paper registration form that was entered by a teacher or administrator.

Returning Missionary: Someone who has returned from a mission as indicated by the scheduled return date (listed for 30 days).

Views: Various lists or ways to view information. The views available on a particular screen, such as Programs, Stakes, Wards, Students, depend on the situation. Each view can be printed or downloaded and saved as xml, excel, csv, pdf, html, tiff, or Word files.

