

Facility Issue Reporting (FIR) System

User's Manual

Content

- INTRODUCTION..... 1**
 - Who should use FIR? 1
 - Setting up Users..... 2
 - How does FIR work?..... 9
- FIR BASICS 10**
 - Accessing the FIR System..... 10
 - FIR Screen Parts..... 11
 - Filtering Issues 12
- CREATING AND EDITING ISSUES 12**
 - Creating Issues 12
 - Adding and Removing Attachments 13
 - Editing Issues 16
 - Exporting an Issue list 17
- WORKING WITH ISSUES..... 18**
 - Marking Issues as Read..... 18
 - Marking Issues as Duplicates..... 19
 - Status and Resolution..... 20
 - Escalating Issues 21
 - Canceling Issues..... 22
 - Notifications..... 23
- FIR AND FMAT 24**
 - Viewing Escalated Issues..... 24
 - Parts of the Escalation Screen 27
- MEETINGHOUSE CLEANLINESS REPORTS..... 29**
- APPLICATION SUPPORT 31**
 - Access Problems..... 31
 - Application Questions and Concerns..... 31

Introduction

The Facility Issue Reporting (FIR) system provides LDS Church leaders, building representatives, and facilities management groups the ability to report and review facility issues electronically. It uses a web interface to streamline reporting, viewing, and resolving facility issues.

Following the introduction, this document covers six topics surrounding the FIR system:

- FIR Basics
- Creating and Editing Issues
- Working with Issues
- FIR and FMAT
- Meetinghouse Cleanliness Reports
- Application Support

The remainder of this introduction will help you understand who should use FIR and how it works.

Who should use FIR?

Two conditions determine whether you are eligible to use the FIR system:

1. Your position
2. The facilities for which you are responsible

FIR Permissions

Position	Issue Viewer	Issue Creator	Issue Escalator	Issue Closer	Notification Email	Cleanliness Report Creator	Cleanliness Report Viewer	Admin
Ward Building Representative	X	X			X	X	X	
Stake Physical Facilities Representative (Stake PFR)	X	X	X	X	X	X	X	
Stake Presidency	X	X	X	X	X		X	
Stake Clerk, Stake Assistant Clerk, Stake Technology Specialist	X	X	X	X	X	X	X	
Ward Bishopric member	X	X			X	X	X	
Ward Clerk & Assistant	X	X			X	X	X	
Temple Presidency	X	X	X	X	X			
Temple Engineer, Temple Recording Engineer	X	X	X	X	X			
Seminary Teacher	X	X			X			
Seminary Principal	X	X	X	X	X			
Mission President	X	X	X	X	X			

FIR Permissions

Position	Issue Viewer	Issue Creator	Issue Escalator	Issue Closer	Notification Viewer	Cleanliness Report Creator	Cleanliness Report Viewer	Admin
Welfare Grain Storage Manager	X	X	X	X	X			
Welfare DI Store Manager	X	X	X	X	X			
LDS Family Services Manager	X	X	X	X	X			
Distribution Services Manager	X	X	X	X	X			
Family History Center Regional Manager	X	X	X	X	X			
HQ Administrator – Help Desk	X		X	X			X	X
Facilities Manager (FM)	X	X	X	X	X		X	
FM Assistant Facilities Manager	X	X	X	X	X		X	
Administrative Assistant (AA)	X	X	X	X	X		X	
Mechanic	X	X	X	X	X			
Area Physical Facilities Manager	X						X	
Area O&M Manager	X						X	
O&M Regional Manager	X						X	

Note: The HQ Administrator position is for Help Desk personnel to assist with researching problems with the FIR system. This role can assume the role of another so they can view the data and issues related to that user.

The FIR system only shows facilities that an FM group services using FMAT. For example, buildings belonging to Welfare, like canneries, will not show unless the servicing agent is an FM Group.

Setting up Users

An LDS Account is required to access the FIR system. If a user needs an LDS Account, they can setup an account at <https://ldsaccount.lds.org>.

Individuals must also be setup in the Member and Leader System (MLS) by the ward or stake clerk before they can access the FIR system. When setting up individuals in MLS, please note that one person may have multiple positions.

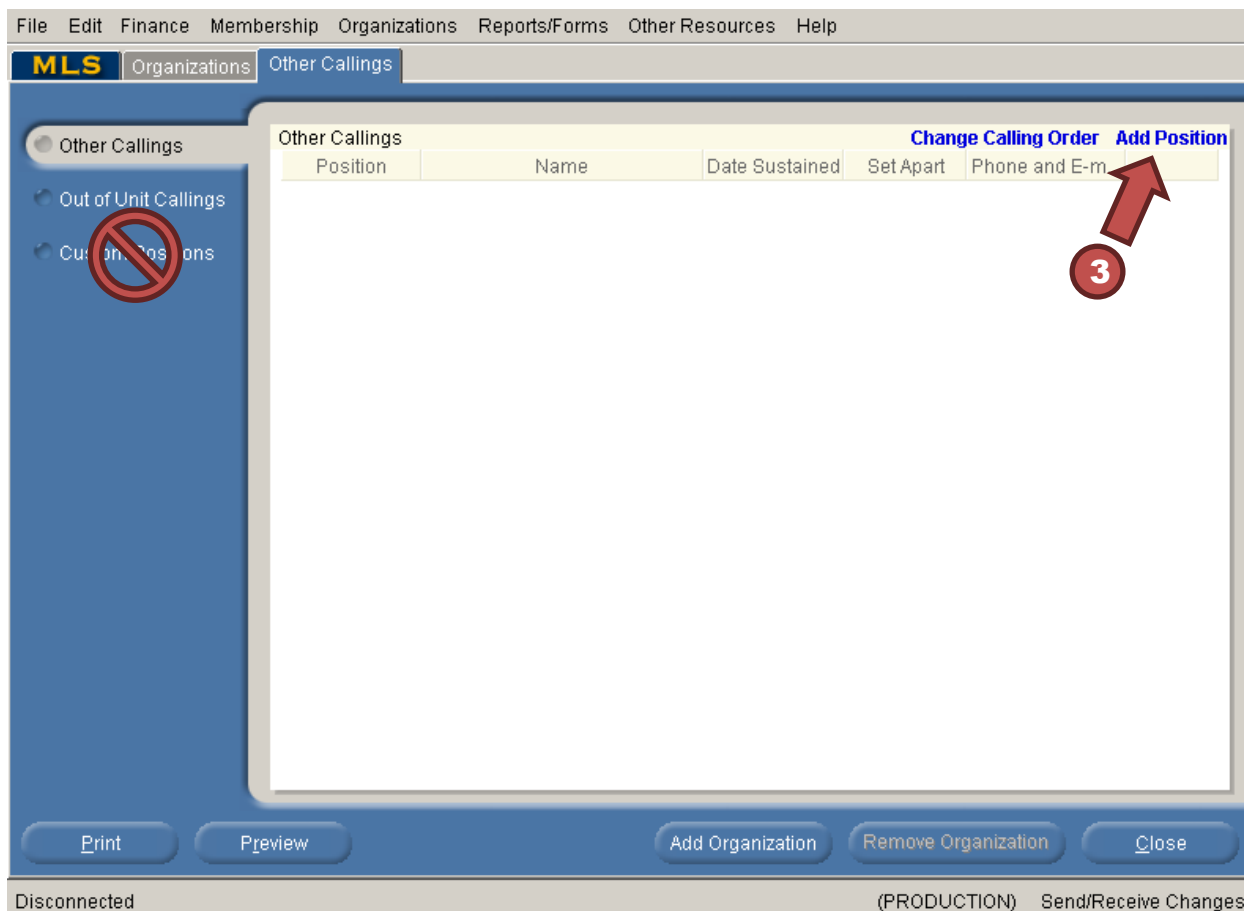
To assign a position to someone in MLS, do the following:



Step 1: Log into MLS, then click More in the Organizations box.

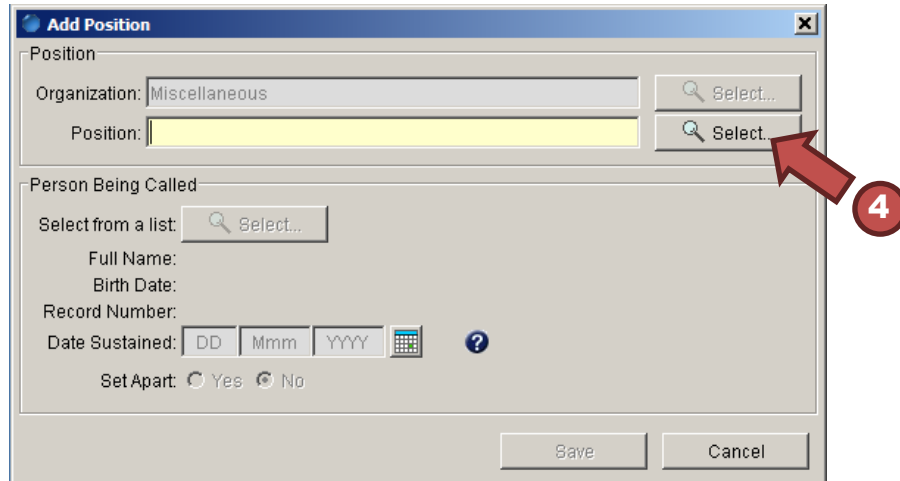


Step 2: Select Other Callings from the Bishopric/Other Callings Box

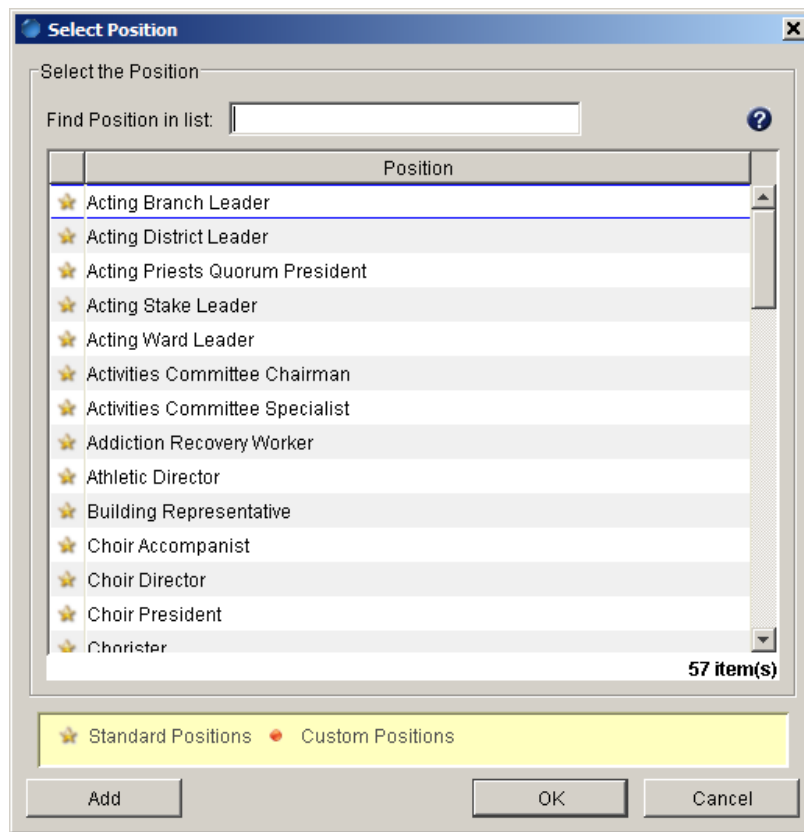


Step 3: Click Add Position to open the Add Position dialog box.

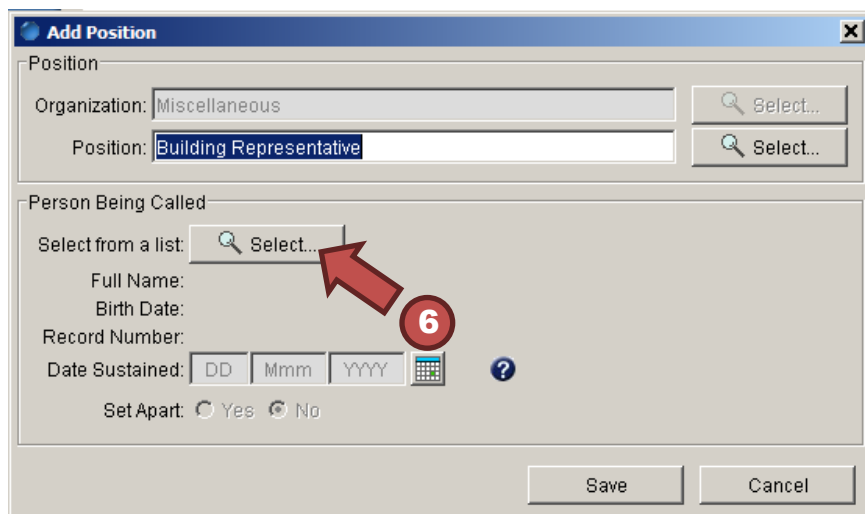
Important: Do not use the Custom Positions option for assigning positions. Custom positions are not valid in the FIR system.



Step 4: Click Select... to the right of the Position field to open the list of positions.

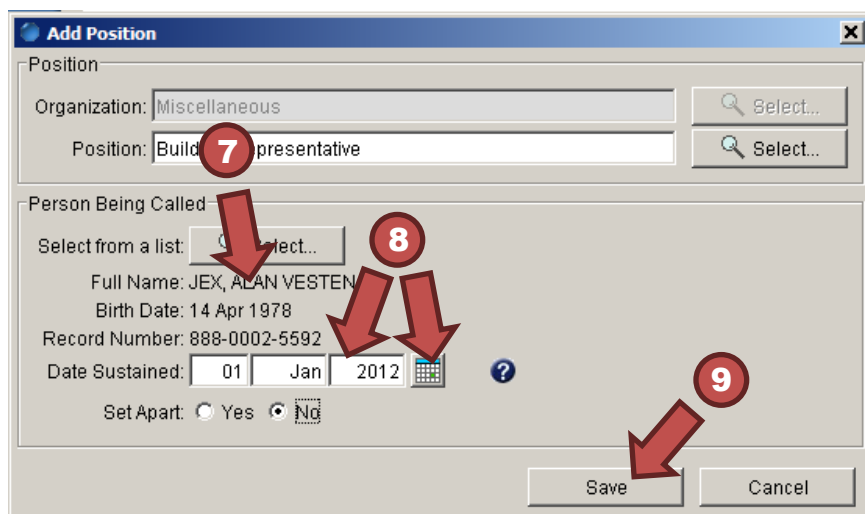


Step 5: Select the appropriate position from the list and click OK (see the FIR Permissions matrix for roles that have access to FIR).



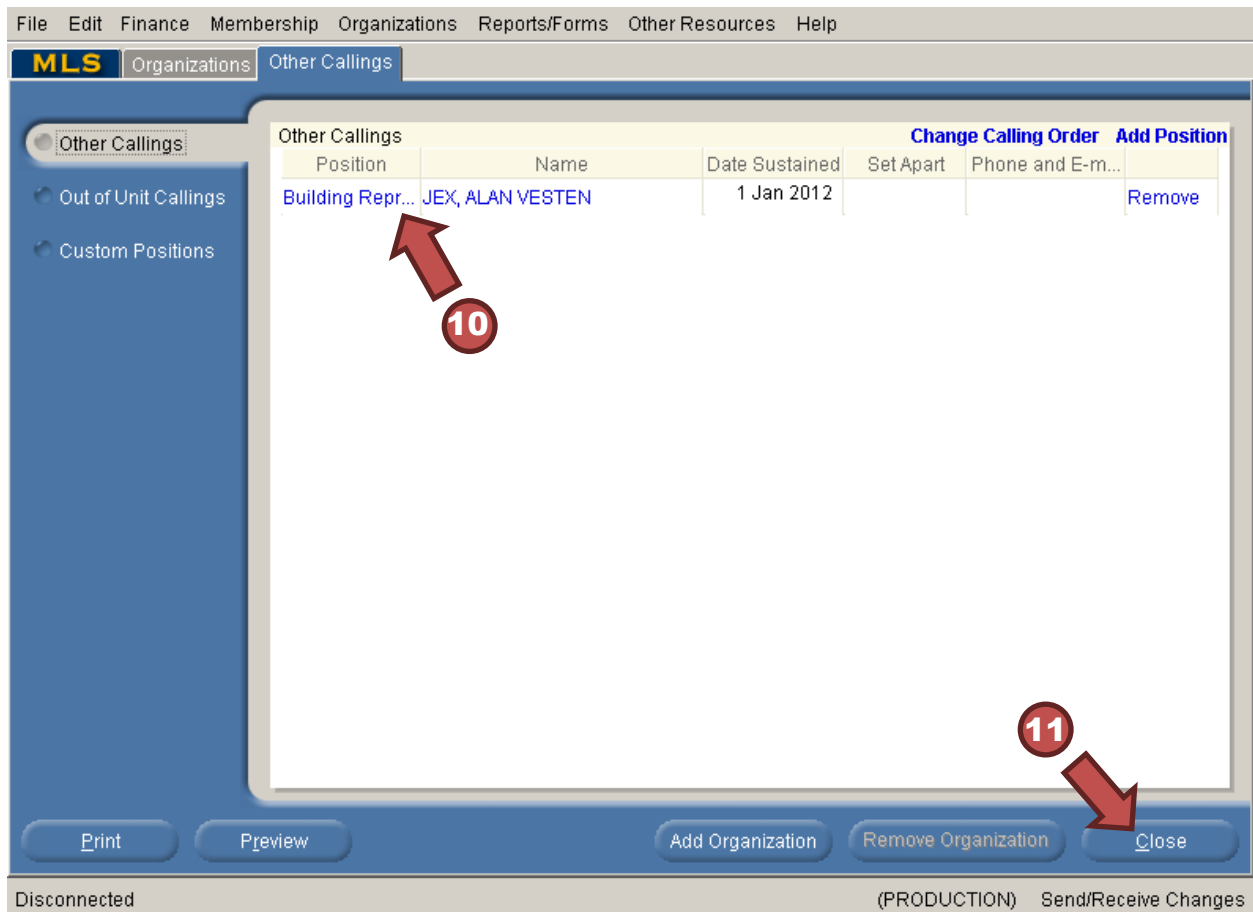
Step 6: Click Select... under the Person Being Called heading to select the member you are assigning to the position you selected in step 5.

Step 7: Select a member from the list and click OK.



Step 8: Set the Date Sustained by selecting the calendar icon or typing the date in the fields.

Step 9: Click Save on the Add Position dialog box.



Step 10: Verify that the position has been set correctly on the Other Callings screen.

Step 11: Click Close to exit the Other Callings section.



Step 12: Click Send/Receive Changes to submit the change to Church Headquarters.

Note: Some members may have been setup with Custom callings. The FIR system does not recognize custom callings.

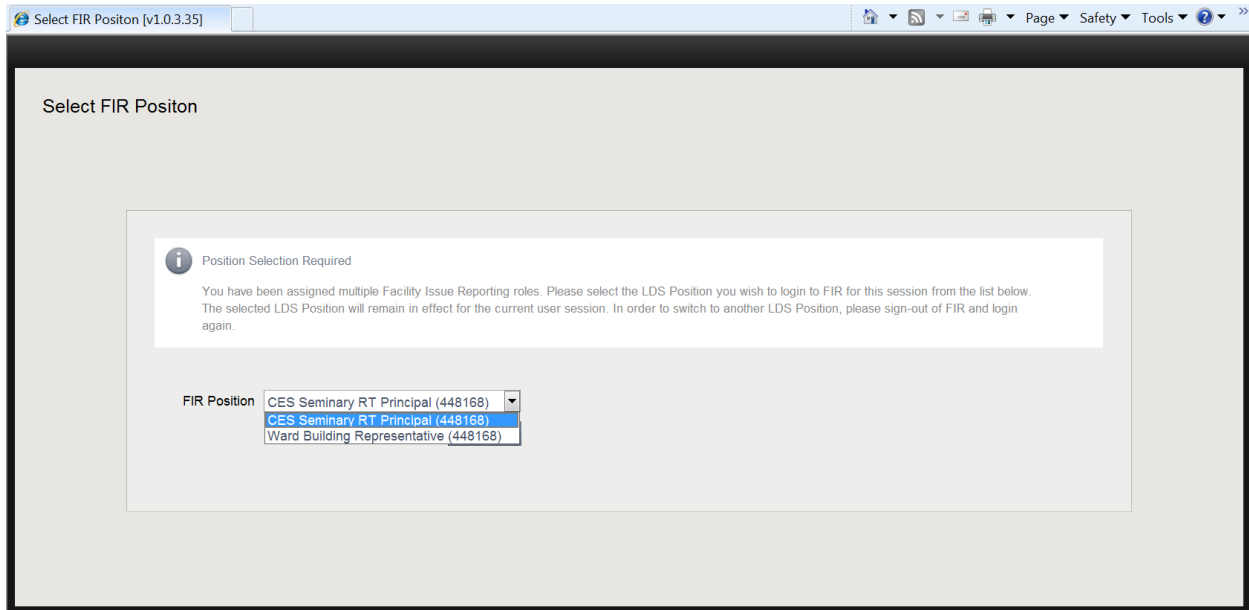
Please be aware that it may take some time for the updates to become effective. Below is a typical timeframe for this to happen:

Day 1 – Clerk sets the position for a person in MLS

Day 2 – 7: Church Directory of Leaders (CDOL) system will reflect the position change

The FIR system will recognize a person’s access after CDOL receives the change.

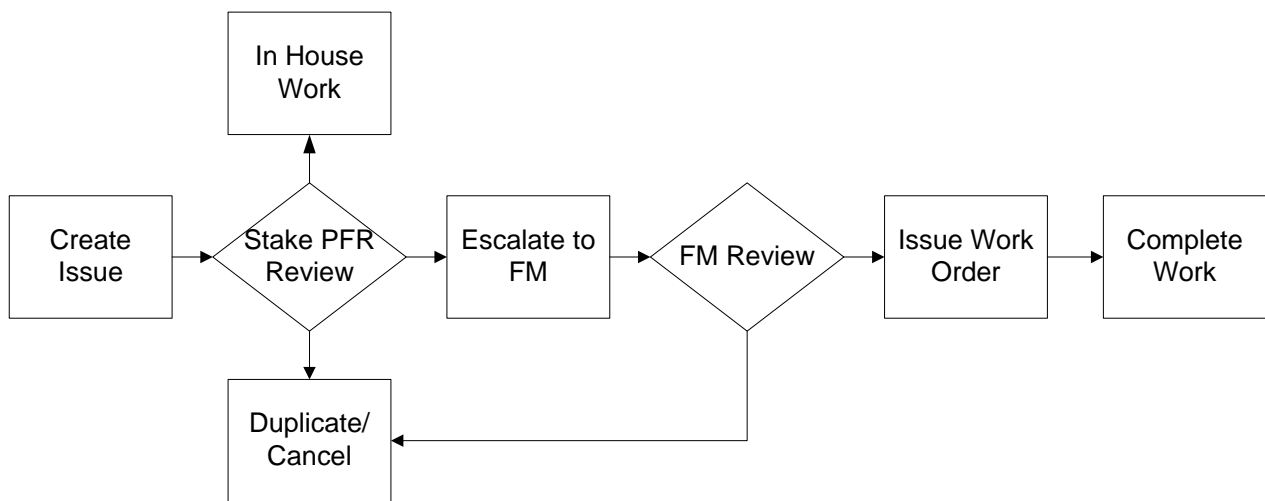
Persons with Multiple Positions: If a person has multiple positions that are accessible in the FIR system, the system will prompt them to select the role with which they want to sign in. For example if the person has the position of Stake Physical Facilities Representative and CES Seminary Teacher, FIR will provide a screen that will require the person to select which role to use.



To switch between roles the user will have to log out and back in with the other role.

How does FIR work?

The flowchart below shows the cycle of an issue in the FIR system:



Note: Reporters can edit and cancel their own issues until they are escalated. Once escalated, issue information can no longer be edited, and their status can only be edited through FMAT.

FIR Basics

To get you started with the FIR system, this section will discuss the following:

- Accessing the FIR System
- Screen Parts
- Filtering Issues

After reading this section, you should feel comfortable navigating the FIR system and viewing reported issues.

Accessing the FIR System

1. Access the FIR system login screen through the tools menu at lds.org or by going to <http://lds.org/fir>.
2. Enter your LDS Account username and password.

FIR Screen Parts

The screenshot shows the FIR system interface with the following components highlighted:

- 1) Top Bar:** Located at the top of the page, containing navigation links like 'View Issues', 'Create Issue', and 'View Cleanliness Reports', along with user information and a help button.
- 2) Issue Categories:** A vertical sidebar on the left side of the screen, listing categories such as 'New Issues', 'All Issues', 'Notifications', and 'Kuna Idaho East Stake'.
- 3) Issue List:** A table in the main content area displaying a list of issues with columns for Issue #, Title, Facility, Date Reported, Reporter, Priority, and Facility Issue Status.
- 4) Issue Quick View:** A detailed view of a specific issue (Issue # 8) showing its description, facility information, dates, reporter, and resolution details.
- 5) Filter Bar:** A horizontal bar above the issue list, providing search and filter options for the displayed data.

1) Top Bar: The top bar across all screens will show the tasks you can perform in FIR. Click the titles to view the screens associated with that task. The default screen when you log in is the View Issues screen.

Note: Tasks in the top bar include View Issues, Create Issue, View Cleanliness Reports, and Create Cleanliness Report. Your role will determine which tasks are available.

The upper right side of the top bar contains information about who is logged in, a link to sign out, and a help button from which this user's manual can be obtained.

2) Issue Categories: Issues are categorized in the left column for easier navigation. Clicking a category changes the issues shown in the issue list. *New Issues* displays issues users have reported that you have not viewed. *All Issues* displays every issue reported for any facility. *Notifications* displays messages regarding action being taken for issues. The remainder of the list displays issues by stake, ward, or other area categories.

3) Issue List: This top right area displays submitted issues for the category selected and the status of those issues. The default view for all users is new issues they are authorized to see for their building or surrounding buildings. If you click All Issues in the Issue Categories area, the Issue List will display all issues in the FIR system.

Important: Check this list to see if anyone has already reported an issue you might want to submit.

4) Issue Quick View: This bottom right area displays details for one of the issues in the list. The default is the first issue in the list.

Tip: You can move the bar that separates the upper and lower half of the screen to show more or less of the quick view area. Left click and hold the left mouse button on the three dots to move the dividing bar up or down.

5) Filter Bar: Use the fields in this area to search for issues.

Filtering Issues

The fields across the columns of the issue list allow you to search for an issue or related set of issues. To search using text fields, type in all or part of the search criteria, then press Enter.

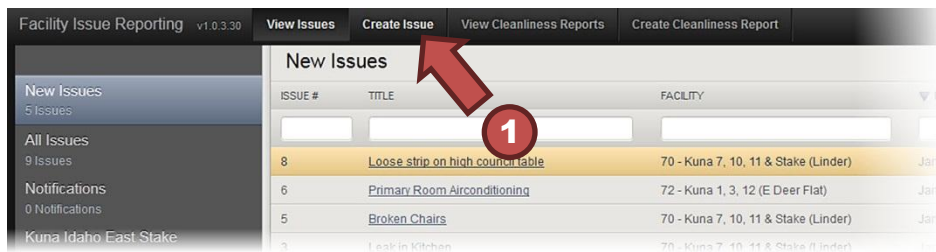
To search using menu fields, click on the arrow on that field, then select a filter option.

Creating and Editing Issues

The FIR system provides options that enhance the issue reporting and resolution process. This section will cover the following:

- Creating Issues
- Adding and Removing Attachments
- Editing Issues
- Exporting an Issue List

Creating Issues



Step 1: Click on Create Issue in the top bar.

Creating and Editing Issues

The screenshot shows the 'Create Facility Issue' form with the following fields and annotations:

- * Reporter (text input)
- * Reporter Phone (text input)
- * Reporter Email (text input)
- * Date Last Observed (date picker)
- * Facility (dropdown menu)
- Priority (dropdown menu)
- Issue Type (dropdown menu) - Annotated with a red arrow and the number '2'.
- * Title (text input)
- * Description (text area)
- * Location of Issue (text input)
- Buttons: Cancel, Next >, Save Changes - Annotated with a red arrow and the number '3'.

Step 2: Fill in information about the issue.

Step 3: Click Save Changes to save your input and return to the View Issues screen.

Important: When filling out an issue report, click Back to return to the prior screen. Click Next to go to the next step in the process. The Close button will not appear until you click Next.

Important: Required fields are marked with an asterisk.

Tip: You can save the information and come back later to finish. You do this by clicking on the “Save Changes” button on the bottom right of the screen. Saving sets the issue to Submitted status and can be edited until that status is changed.

Once saved, the system sends the reported issue to the Stake Physical Facilities Representative or other escalator for review and action.

Adding and Removing Attachments

The reporter and escalator can add attachments to an issue until the status changes to Escalated.

Creating and Editing Issues

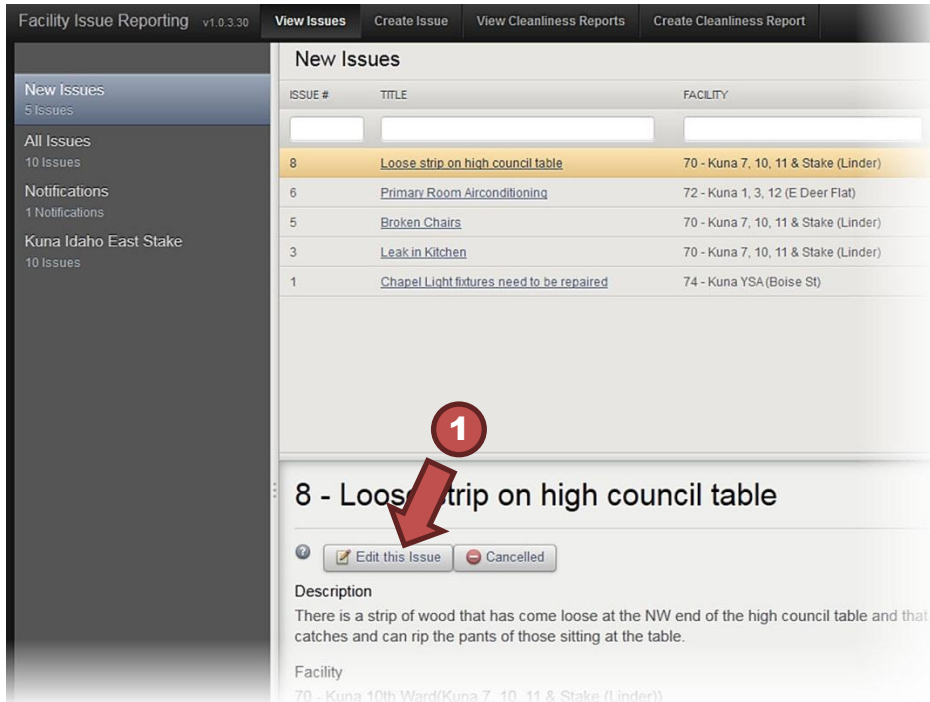
The FIR system can accept any of the following formats as an attachment (Max size is 10MB):

Description	Extension
Power Point Presentation	.ppt
JPEG Image	.jpg
Word Document	.doc
Excel Spreadsheet	.xls
GIF Image	.gif
PNG Image	.png
Adobe Acrobat PDF	.pdf
Microsoft Document like PDF	.xps
Text document	.txt
Visio flowchart or diagram	.vsd

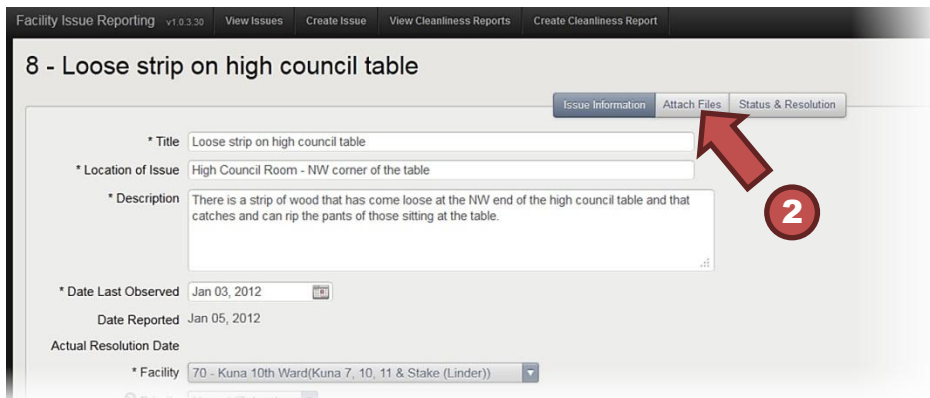
Note: The FIR system does not yet forward attachments to FMAT; however, they can be seen in the FIR system.

Creating and Editing Issues

To add an attachment, follow the steps below:



Step 1: Click Edit this Issue in the Issue Quick View panel.



Step 2: Click the Attach Files tab to display the attachments screen.

Creating and Editing Issues



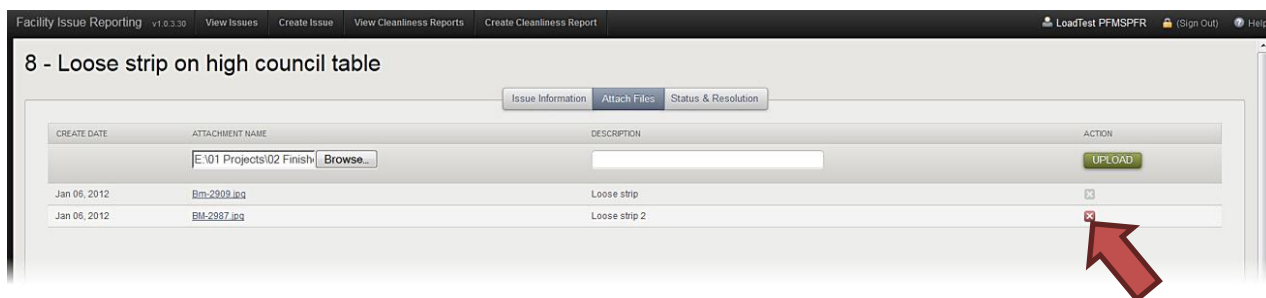
Step 3: Click Browse... to search your computer for the image or document you would like to attach.

Step 4: Enter a description for the attachment.

Step 5: Click Upload.

Important: Users can add attachments to an issue as long as it still has a Submitted status. The FIR system assigns an issue a Submitted status after the issuer saves it. The Submitted status remains until an escalator closes, cancels, escalates, or marks the issue as a duplicate.

To remove an attachment, click the red X in the action column.

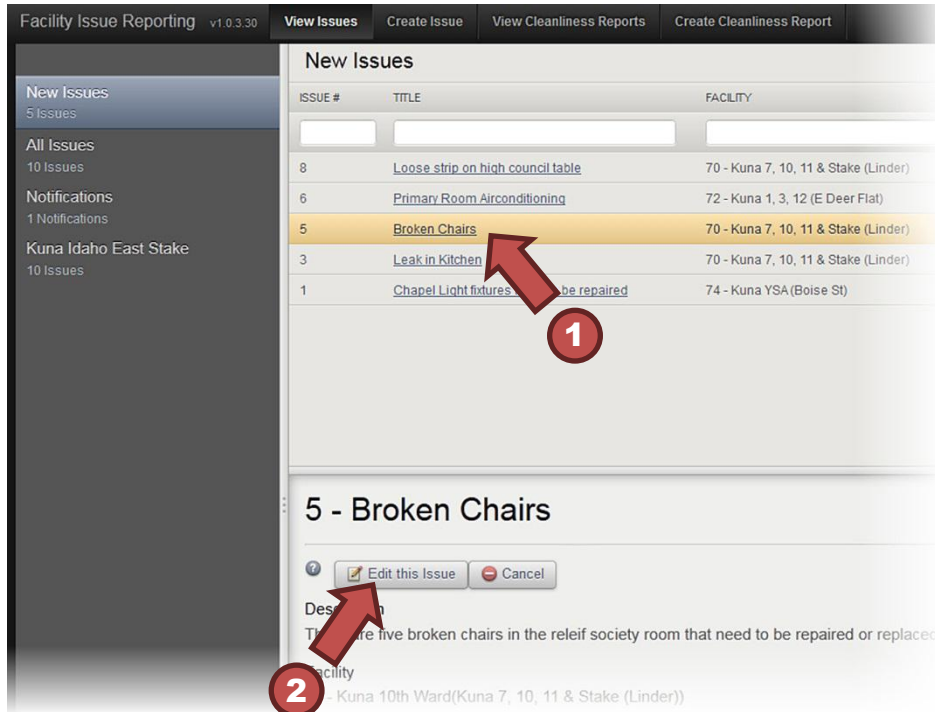


Editing Issues

Important: A reporter can only edit an issue while it is in Submitted status.

Important: Only certain roles can edit issues.

To edit an issue, do the following:

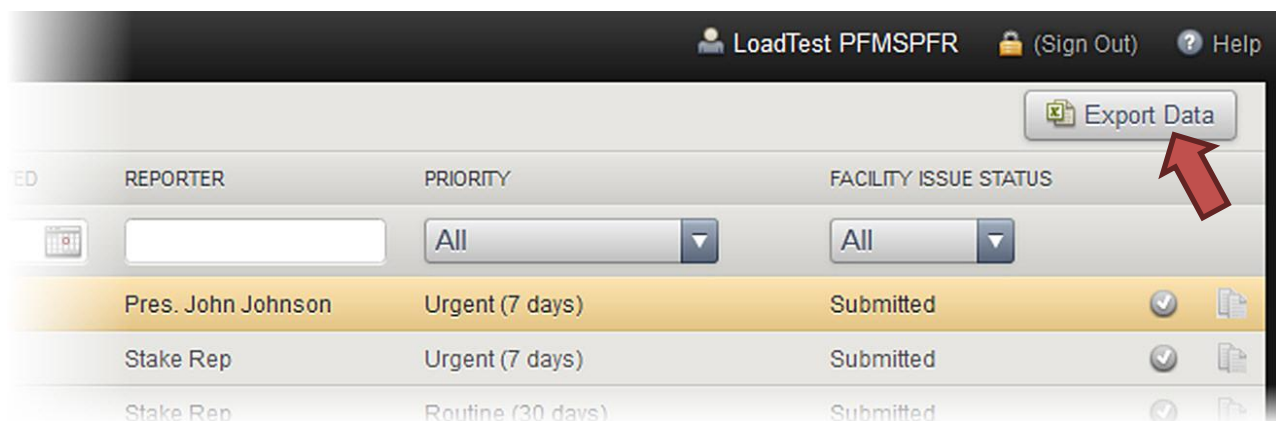


Step 1: Highlight the issue from the issue list.

Step 2: In the Issue Quick View panel, click Edit this Issue.

Exporting an Issue list

Click Export Data to export all issues shown in the Issue List to a CSV file that is readable by Excel.



Note: What is a CSV file? CSV stands for comma-separated values. So, a CSV file is a file that separates

text entries with commas. When you open a CSV file in a spreadsheet program (e.g. Excel), it places the text into cells based on the location of the commas.

Note: Exporting data exports the fields currently listed on the screen. If you are looking at a category, you will only export the data within that category. If you have filtered the data, you will only export what was filtered.

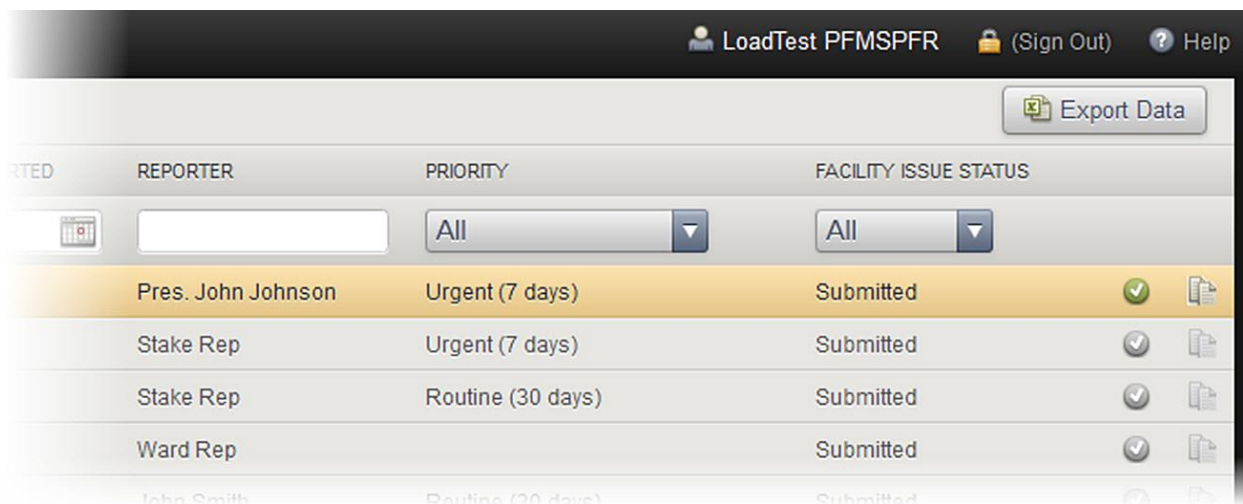
Working with Issues

After a user creates an issue, several things can happen. This section will discuss the following common actions related to submitted issues:

- Marking Issues as Read
- Marking Issues as Duplicates
- Status and Resolution
- Escalating Issues
- Cancelled Issues
- Notifications

Marking Issues as Read

A user can mark a new issue as read so they can note what they have and have not viewed. To mark an issue as read, click on the checkmark in a green circle at the end of the issue row. This removes the issue from the New Issues category.

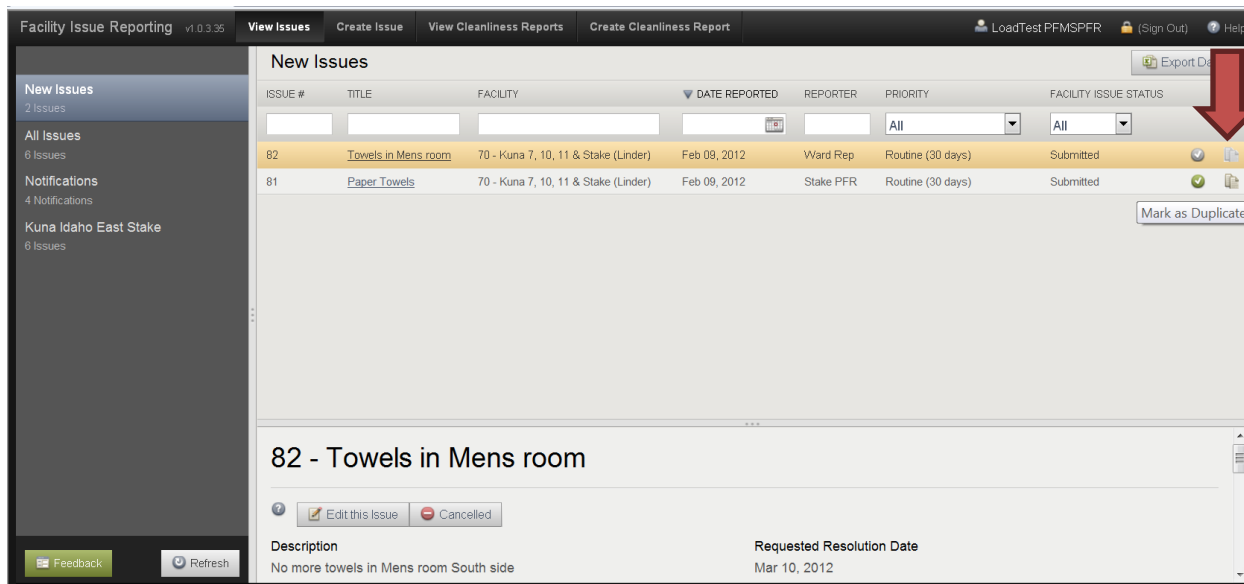


The screenshot shows the top navigation bar with 'LoadTest PFMSPPFR', '(Sign Out)', and 'Help'. Below is an 'Export Data' button. The table has columns: REPORTED, REPORTER, PRIORITY, FACILITY ISSUE STATUS, and a column for actions (checkmarks and document icons). The first row is highlighted in yellow.

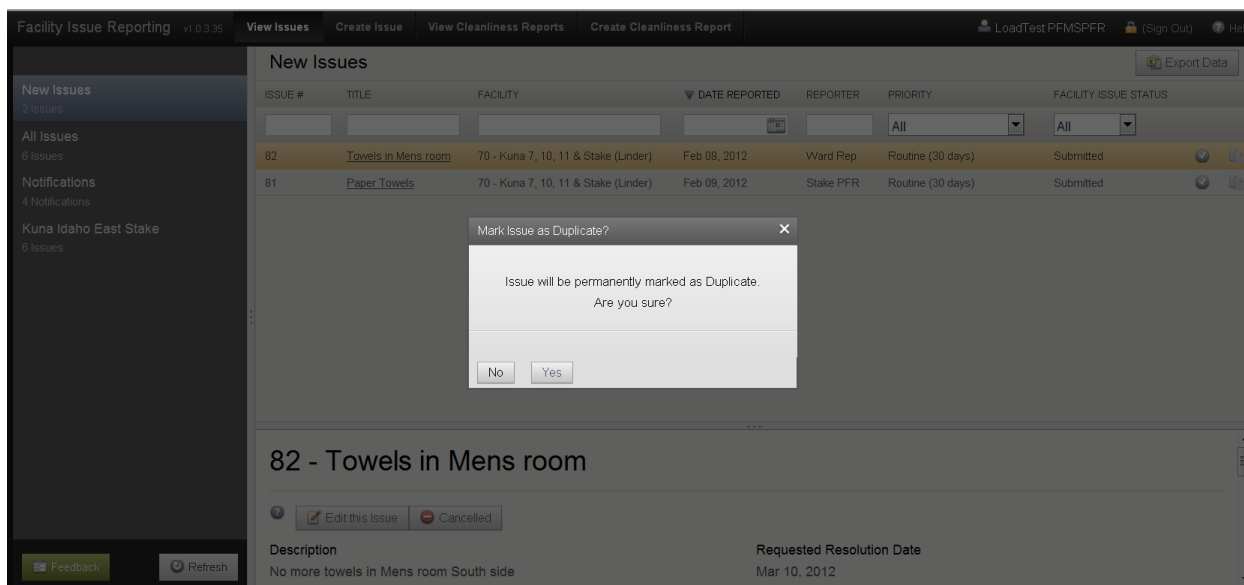
REPORTED	REPORTER	PRIORITY	FACILITY ISSUE STATUS	
		All	All	
	Pres. John Johnson	Urgent (7 days)	Submitted	✓
	Stake Rep	Urgent (7 days)	Submitted	✓
	Stake Rep	Routine (30 days)	Submitted	✓
	Ward Rep		Submitted	✓
	John Smith	Routine (30 days)	Submitted	✓

Marking Issues as Duplicates

A user can mark an issue as a duplicate if more than one issue was submitted for the same problem. To mark an issue as a duplicate, click on the paper icon at end of the issue row.



A confirmation box will appear to ensure you want to mark this item as duplicate. After you confirm the issue as a duplicate, the issue status will change. You cannot make changes to an issue after it is marked as a duplicate.



Status and Resolution

Only those that have an escalator role can see the Status and Resolution screen. Users perform three tasks on this screen:

- Record actions taken to resolve an issue
- Provide additional information to the FM Office about an issue
- Change the status of an issue

Issues have the following statuses:

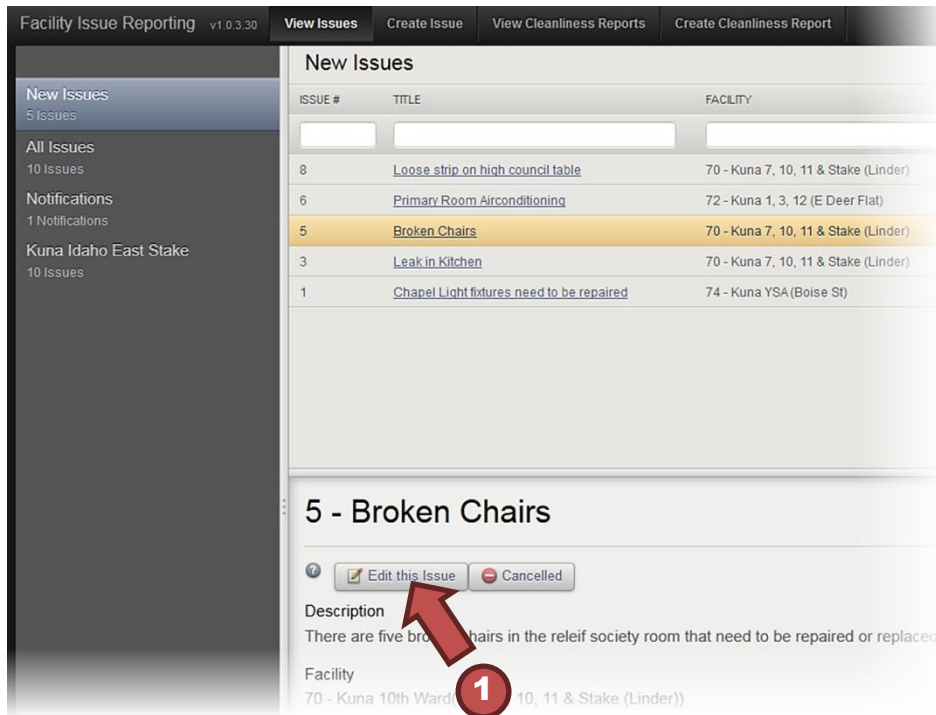
- Submitted – Waiting review by the escalator (Stake PFR)
- Escalated – Forwarded to the FM Office for review/work
- Open - Accepted by the FM Office in FMAT
- Cancelled – Not accepted
- Duplicate – Issue reported matches an already existing issue
- Closed – Work completed

Important: If an issue has been Closed or Cancelled, it cannot be reopened even if deemed unresolved. A new issue must be created to resolve the issue.

Note: Escalated issues can only have their statuses changed through FMAT by the FM, AA, or Help Desk.

Escalating Issues

If the Escalator determines that an issue should be addressed by an FM Office, they can escalate the issue by doing the following:



Step 1: Open the issue for editing.



Step 2: Click the Status & Resolution tab.

Facility Issue Reporting v1.0.3.30 View Issues Create Issue View Cleanliness Reports Create Cleanliness Report

5 - Broken Chairs

Issue Information Attach Files Status & Resolution

Issue Status Submitted

Escalator Notification Email StakeR@yahoo.com

Requested Resolution Date Feb 04, 2012

Notes

Resolution

Escalate Cancelled Close

Step 3: Enter notes or comments to clarify the issue for the facility management office in the Notes field.

Step 4: Click Escalate at the bottom of the screen.

Clicking Escalate will send the issue to FMAT for the FM Office to review.

Canceling Issues

If an issue is no longer valid or has already been resolved, click Cancel in the Issue Quick View panel.

Facility Issue Reporting v1.0.3.30 View Issues Create Issue View Cleanliness Reports Create Cleanliness Report

New Issues

ISSUE #	TITLE	FACILITY
6	Primary Room Airconditioning	72 - Kuna 1, 3, 12 (E Deer Flat)
3	Leak in Kitchen	70 - Kuna 7, 10, 11 & Stake (Linder)
1	Chapel Light fixtures need to be repaired	74 - Kuna YSA (Boise St)

6 - Primary Room Airconditioning

Edit this Issue Cancel

Description

The air conditioner doesn't seem to be working in the primary room.

Note: Only users with appropriate permissions can cancel issues.

After clicking Cancel, a text box will open requiring a reason for canceling the issue. Reasons entered in this box will be viewable by the original reporter in the Notifications category.

Notifications

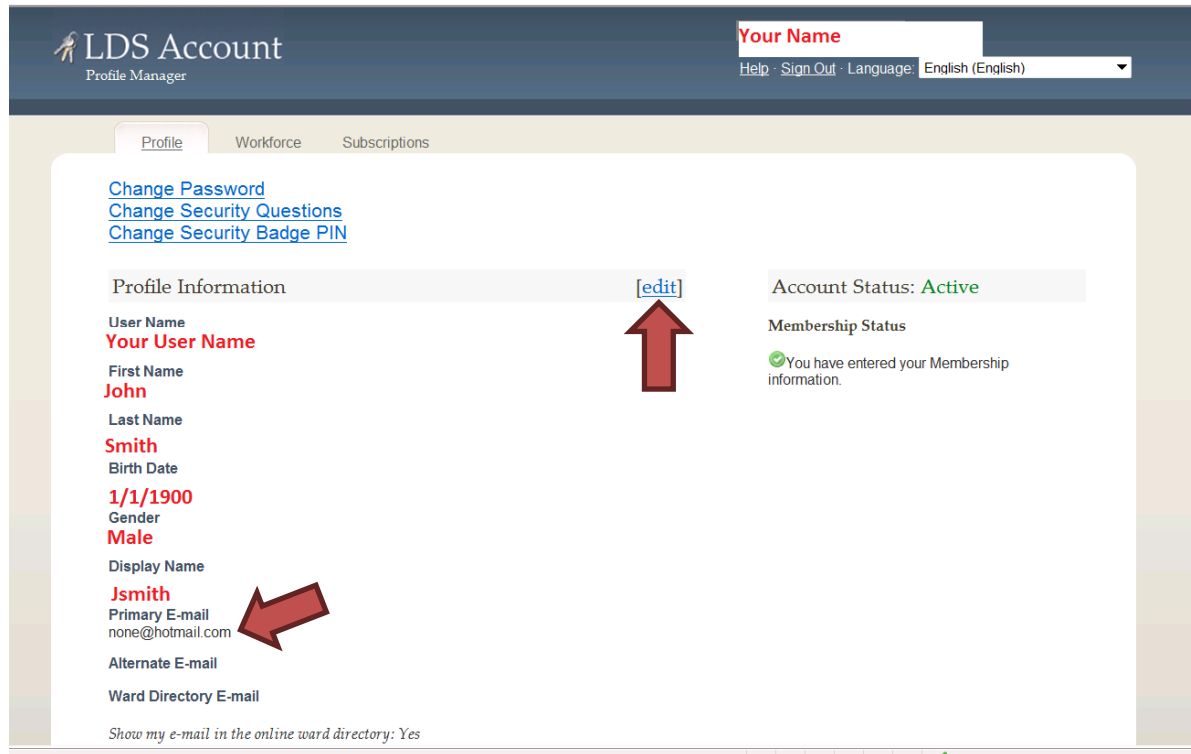
When the status of an issue changes, the FIR system notifies reporters and escalators by email. The chart below shows who receives event notifications:

Event	User Notified	Email
Reporter Submits Issue	Stake PFR/Updater-Escalator	X
Issue is Escalated	Stake PFR/Updater-Escalator, FM, Assistant FM, AA	X
Operational Work Order associated with FIR Issue has been Opened	Stake PFR/Updater-Escalator	X
FIR Issue is Closed, Cancelled, Duplicated	Reporter	X
Operational Work Order associated with FIR Issue is Closed	Stake PFR/Updater-Escalator	X

Be sure to include a valid email address in your LDS Account profile as the Primary E-mail so you can receive notifications from the FIR system. To verify the email address in your LDS Account, do the following:

Step 1: Go to ldsaccount.lds.org

Step 2: Sign in using your LDS Account username and password.



Step 3: If the Primary E-mail address is not correct or not listed on the profile page, click “edit” and enter the correct email address.

FIR and FMAT

The FIR system integrates with FMAT to streamline reporting and resolution. Only the facility manager, administrative assistant, regional facility manger, Area O&M manager, and Help Desk will be able to see the following FMAT screens. To help you understand how the FIR system integrates with FMAT, this section will discuss the following:

- Viewing escalated issues
- Parts of the escalation screen

Viewing Escalated Issues

Facilities managers, assistant facilities managers, and administrative assistants will see the number of recently escalated FIR issues on the dashboard when they log into FMAT. Clicking on the number in the right column will take the user to the Facility Issue Escalation Screen where they can view new escalated FIR issues (see images below).

Facilities Management Automated Tools

Nampa ID FM Group, O&M, Facilities Manager

Administration
Facility Planning
Finances
R&I Capital Project

My Favorites

My Tasks

Dashboard Loaded 1/13/2012:8:18:07 AM [Refresh](#)

OTHER TASKS
 New FIR escalated issues: [5](#)
R&I WORK ORDER
 Prev. Years >90 done not closed: [1](#)

Performance

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My Reports

Rights and use information

Facility Issue Escalation
Stucki, Carol A
OM489 44-1137144

Issue#	FIR Status	Facility	Input Date	Resolution Date	<input type="button" value="Search"/>
<input type="text"/>	Escalated	<input type="text"/>	MM/DD/YYYY	MM/DD/YYYY	<input type="button" value="Clear"/>
Title	Reporter	Priority	WO#	WO Status	
<input type="text"/>	<input type="text"/>	All	<input type="text"/>	<input type="text"/>	

Issue#	Title	Facility	Input Date	Resolution Date	Reporter	Priority	FIR Status	WO#	WO Status	Cancel	Duplicate
9	Broken Chair Clerks office	Nampa 5, 17, YSA 2 & Stake (Deer Flat)	1/10/2012		John FM	Routine (30 days)	Escalated			<input type="checkbox"/>	<input type="checkbox"/>
10	Heat in Primary	Nampa 5, 17, YSA 2 & Stake (Deer Flat)	1/10/2012		John FM	Urgent (7 days)	Escalated			<input type="checkbox"/>	<input type="checkbox"/>

Description

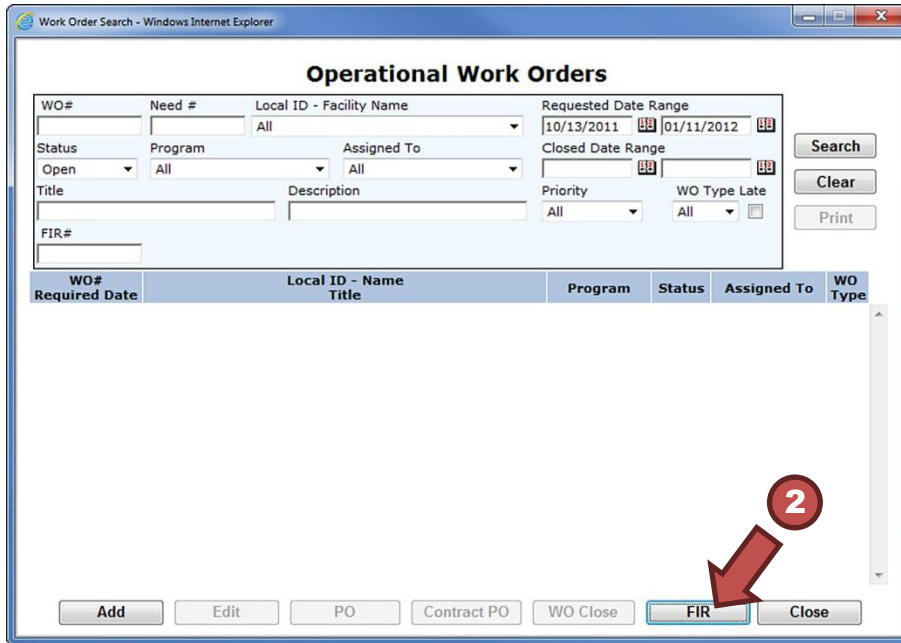
Notes

Attachments

Resolution Notes

Note: Clicking the number on the dashboard shows only new escalated issues. FMAT receives new escalated issues immediately, but the dashboard number updates only once every 24 hours.

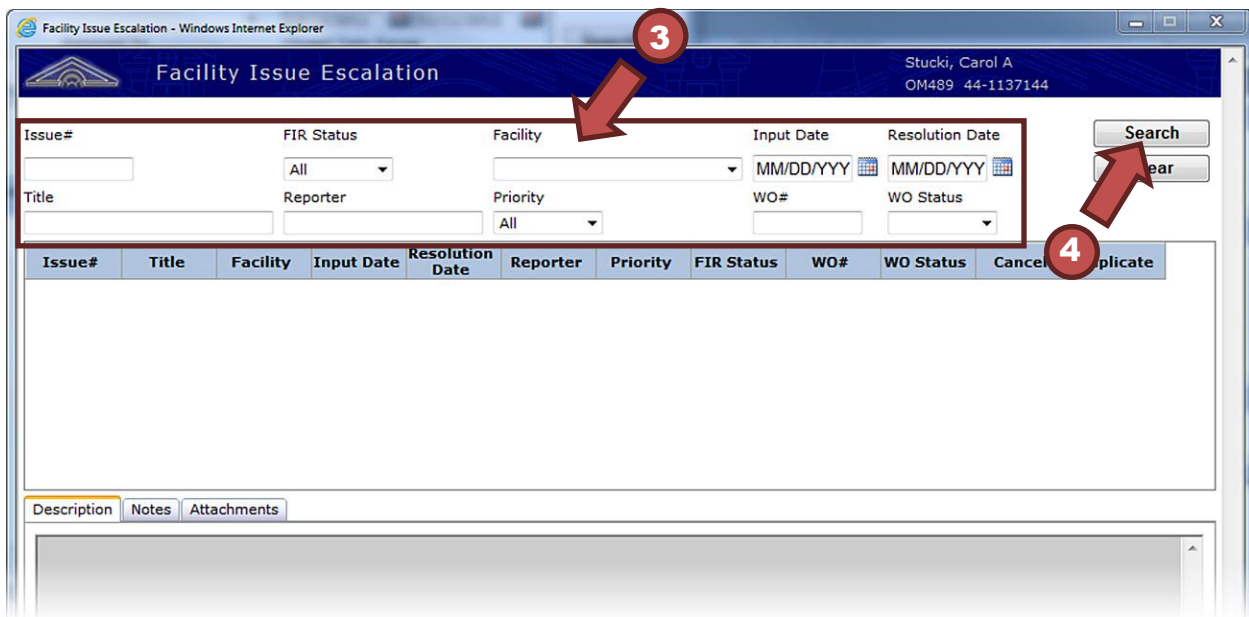
To view issues that users have reported using the FIR system, do the following:



Step 1: Select Operational Work Orders from the Operations tab on the FMAT home screen (not shown).

Step 2: Click the FIR button at the bottom of the Operational Work Orders search screen.

Clicking on this button will open the Facility Issue Escalation screen.



Step 3: Enter the desired filter data at the top of the screen.

Step 4: Click Search to see the list of FIR issues that match the filter criteria.

Parts of the Escalation Screen

The screenshot shows the 'Facility Issue Escalation' application window. At the top, it displays the user's name 'Stucki, Carol A' and ID 'OM489 44-1137144'. Below this is a search and filter section with fields for Issue#, FIR Status (set to 'All'), Facility, Input Date, Resolution Date, Title, Reporter, Priority, WO#, and WO Status. A 'Search' button and a 'Clear' button are also present.

The main data table lists three issues:

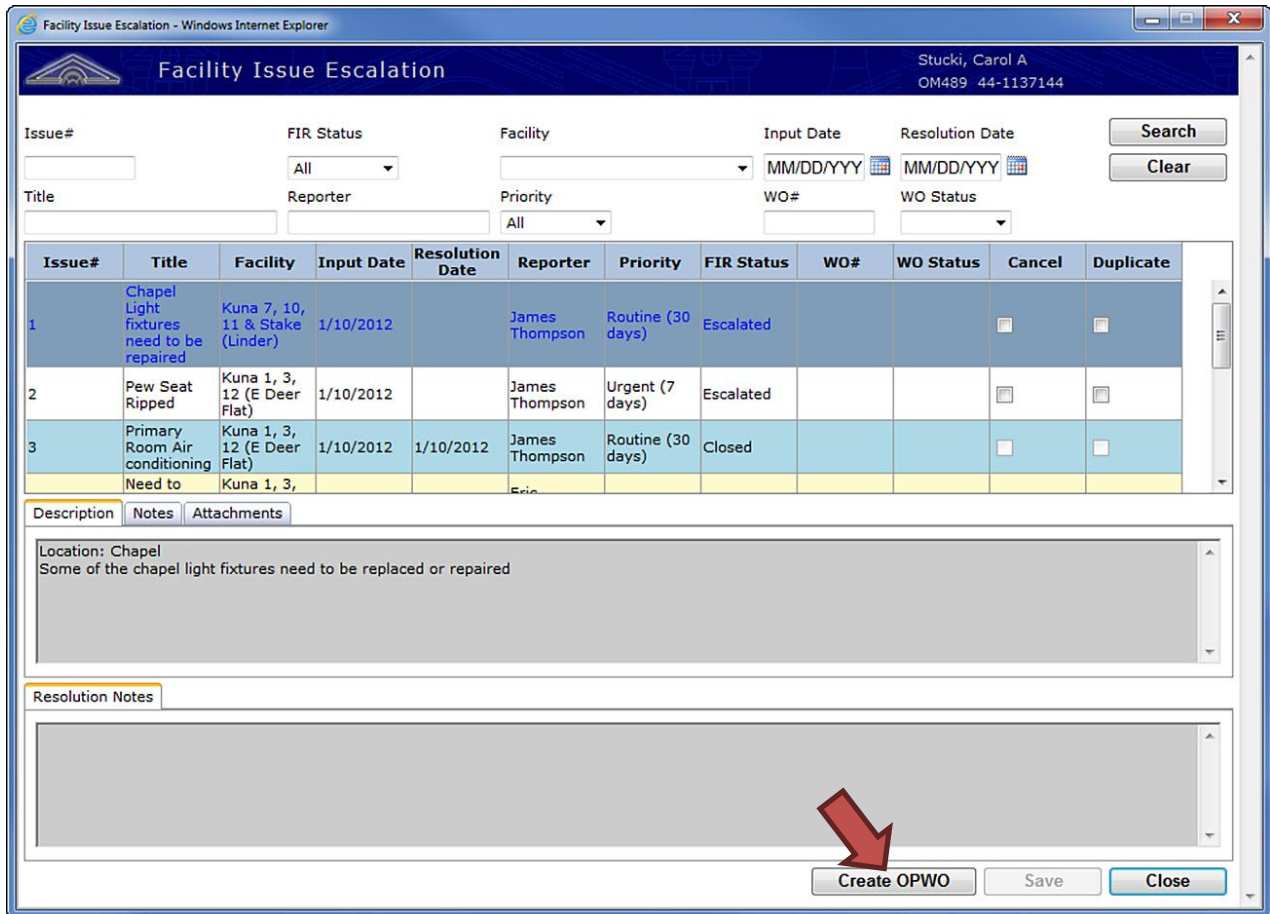
Issue#	Title	Facility	Input Date	Resolution Date	Reporter	Priority	FIR Status	WO#	WO Status	Cancel	Duplicate
1	Chapel Light fixtures need to be repaired	Kuna 7, 10, 11 & Stake (Linder)	1/10/2012		James Thompson	Routine (30 days)	Escalated			<input type="checkbox"/>	<input type="checkbox"/>
2	Pew Seat Ripped	Kuna 1, 3, 12 (E Deer Flat)	1/10/2012		James Thompson	Urgent (7 days)	Escalated			<input type="checkbox"/>	<input type="checkbox"/>
3	Primary Room Air conditioning Need to	Kuna 1, 3, 12 (E Deer Flat)	1/10/2012	1/10/2012	James Thompson	Routine (30 days)	Closed			<input type="checkbox"/>	<input type="checkbox"/>

Below the table are sections for 'Description Notes' and 'Resolution Notes'. At the bottom right, there are buttons for 'Create OPWO', 'Save', and 'Close'. Several callout boxes provide instructions: 'Use the filter criteria to search issues.' points to the filter fields; 'Select an issue to view more information about the issue.' points to the first row; 'After highlighting an escalated issue, click Create OPWO to create an operational work order from the issue.' points to the 'Create OPWO' button; and 'The FM has the option to mark the issue as a Duplicate or Cancel it.' points to the 'Cancel' and 'Duplicate' checkboxes.

If the user does not fill out any filter fields, they will see a listing of all FIR issues in this list, regardless of status.

Note: Only those issues in Escalated or Open status can be edited from FMAT.

Highlighting an issue in Escalated status will show the description and notes information in the tabs. The FIR system does not forward attachments to FMAT in the current version; therefore, the attachments tab does not contain any information.

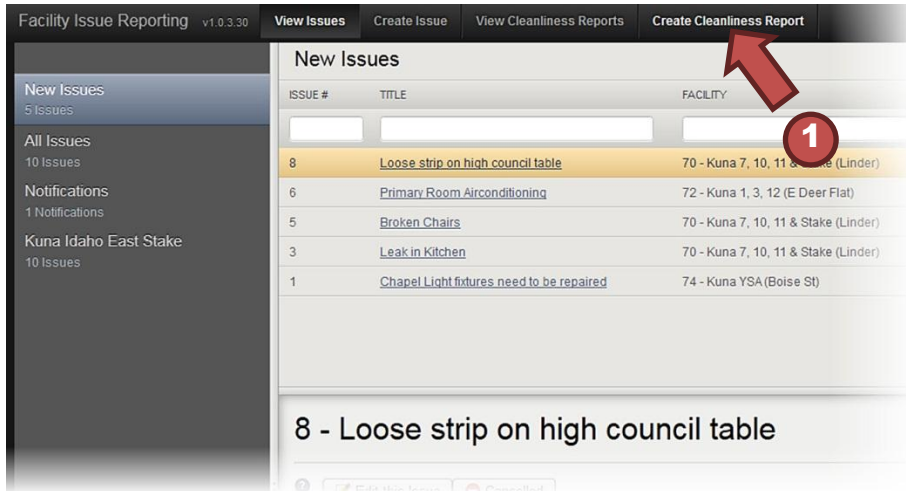


At this time an Operational Work Order can be created by clicking on the Create OPWO button. Most of the needed data will already be populated. Multiple Work Orders can be created from a single FIR issue.

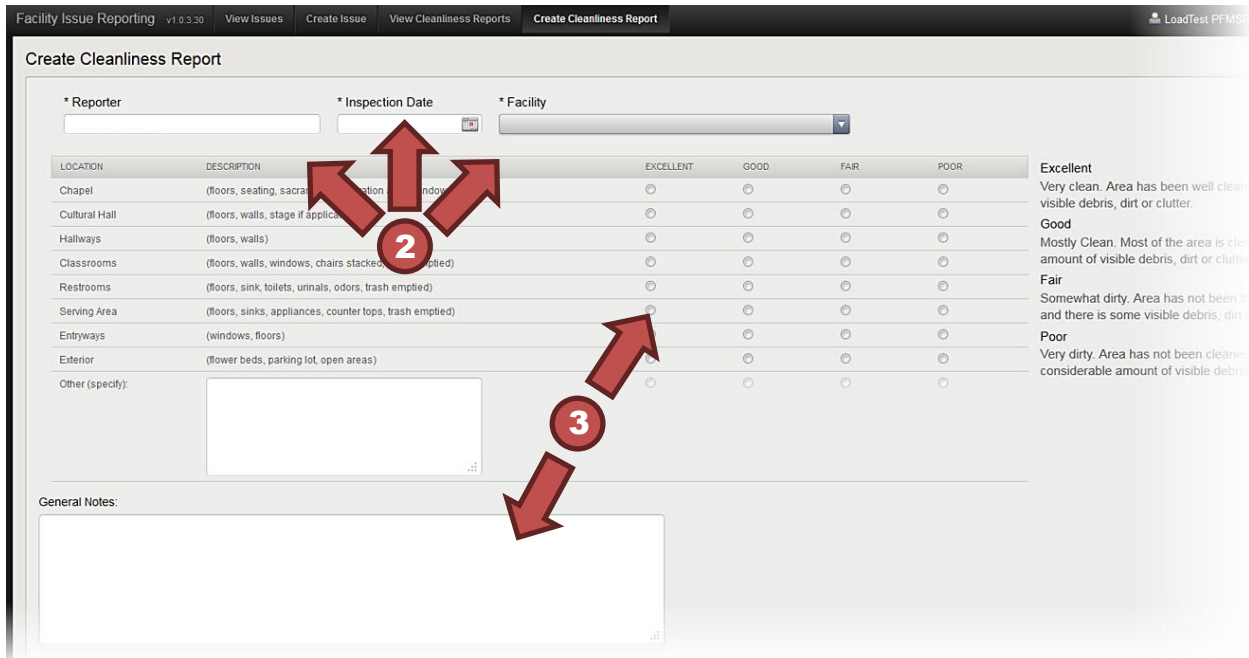
Important: After creating the OPWO, you will need to click Save on the work order screen in order for FMAT to create the work order.

Meetinghouse Cleanliness Reports

The stake PFR, ward building representative, or bishopric member can fill out a Meetinghouse Cleanliness Report using the FIR system. To create a report, do the following:



Step 1: Click Create Cleanliness Report in the top bar of the FIR system to bring up the Create Cleanliness Report screen.



Step 2: Type your name as the reporter, enter the date, and select the facility you are rating.

Step 3: Mark the appropriate rating buttons and enter notes for information or clarification.

The screenshot shows a form with several rows of radio buttons for selecting a cleanliness level. To the right of the radio buttons are three text descriptions:

- Fair**: Somewhat dirty. Area has not been thoroughly cleaned, and there is some visible debris, dirt or clutter.
- Poor**: Very dirty. Area has not been cleaned. There is a considerable amount of visible debris, dirt or clutter.

A red circle with the number '4' and a red arrow points to a green 'Submit' button located in the bottom right corner of the form.

Step 4: Click the submit button in the bottom right corner of the screen.

Important: No changes to the report will be allowed once it has been submitted.

The ward building representative, bishopric, stake PFR, stake presidency, stake clerk, ward clerk, FM, AA, or Help Desk can search for a report within the history. To view past reports, click View Cleanliness Reports in the top bar of the FIR system.

The screenshot shows the 'Facility Issue Reporting' system interface. The top navigation bar includes buttons for 'View Issues', 'Create Issue', 'View Cleanliness Reports', and 'Create Cleanliness Report'. A red arrow points to the 'View Cleanliness Reports' button. The main content area displays a table titled 'New Issues' with the following data:

ISSUE #	TITLE	FACILITY
8	Loose strip on high council table	70 - Kuna 7, 10, 11 & Stake (Linder)
6	Primary Room Airconditioning	72 - Kuna 1, 3, 12 (E Deer Flat)
5	Broken Chairs	70 - Kuna 7, 10, 11 & Stake (Linder)
3	Leak in Kitchen	70 - Kuna 7, 10, 11 & Stake (Linder)
1	Chapel Light fixtures need to be repaired	74 - Kuna YSA (Boise St)

Below the table, a partial view of another issue is visible: '8 - Loose strip on high council table'.

Note: Only the last 12 months will be stored.

Application Support

Access Problems

If you are having problems gaining access to the FIR system, please contact the Global Service Desk.

By Phone

US and Canada – (866)678-2763
Salt Lake City area – (801)240-HELP(4357)
Europe and Africa – +800-2950-2950
Other International Areas – +1-801-240-4357

By Email

globalservicecenter@ldschurch.org

Application Questions and Concerns

For questions or concerns with the FIR system, please contact the FM office that is responsible for your area. FM office personnel, contact your DTA FMAT support person or Meetinghouse Facilities Administrative Support for assistance.

Meetinghouse Facilities Administrative Support
(801)240-5688
FMD-FMG-Support@ldschurch.org