MEETINGHOUSE FACILITIES DEPARTMENT

Facility Issue Reporting (FIR) System

User's Manual

Release Date: 29 March 2012

Content

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

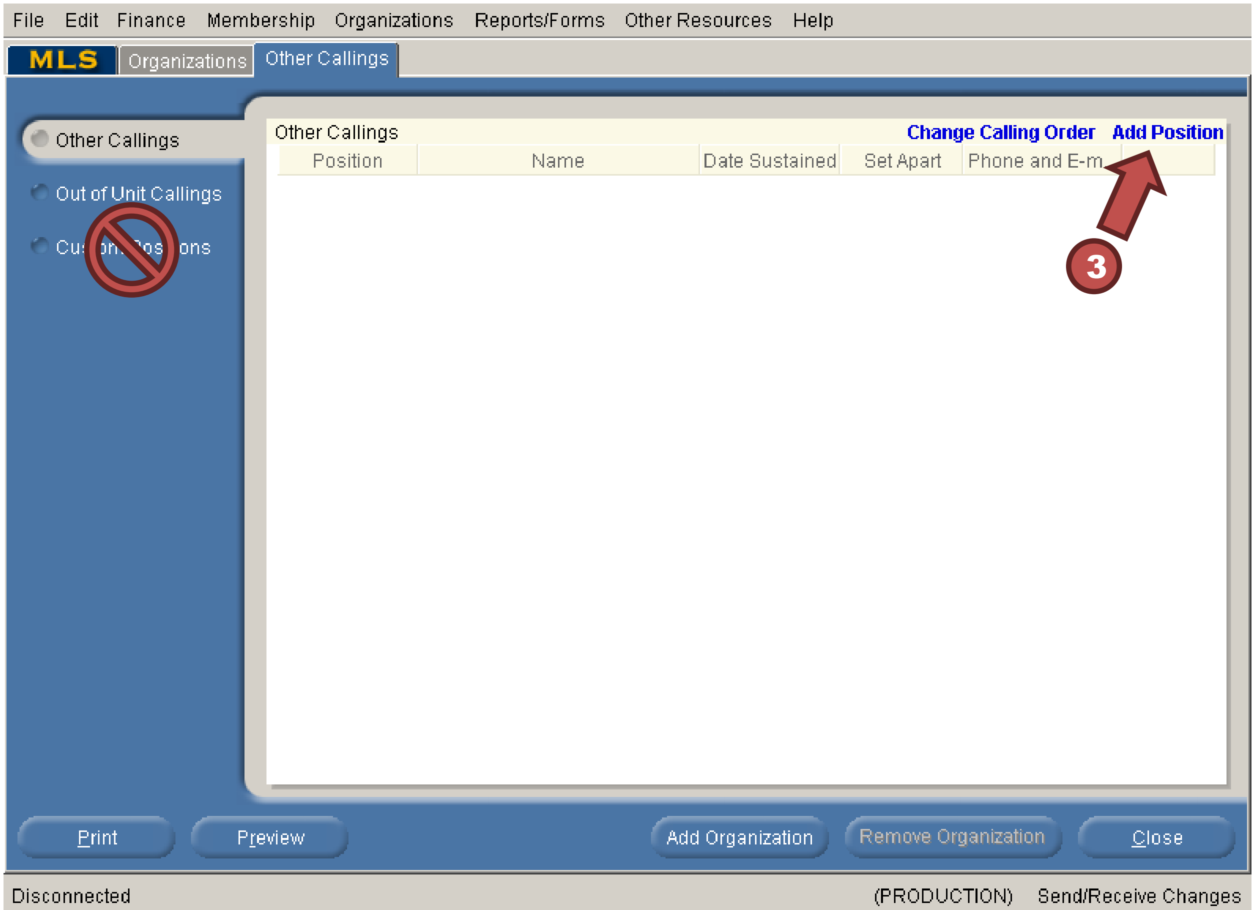
An LDS Account is required to access the FIR system. If a user needs an LDS Account, they can setup an account at https://ldsaccount.lds.org.

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:

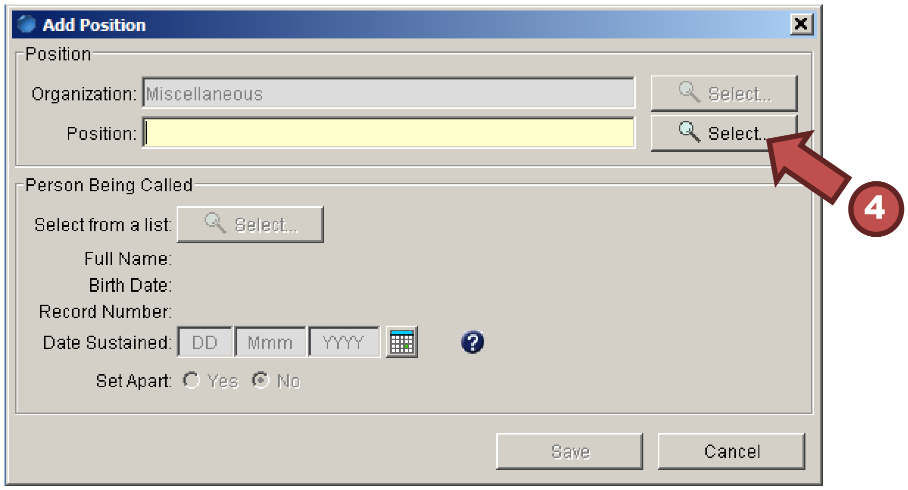
Step 1: Log into MLS, then click More in the Organizations box.

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

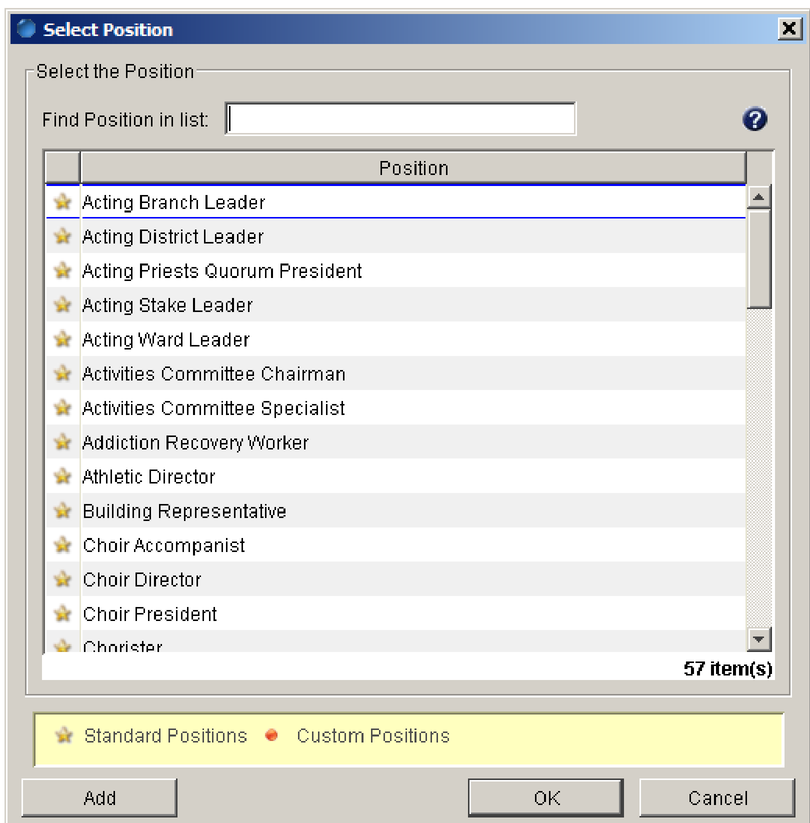


Step 3: Click Add Position to open the Add Position dialog box.

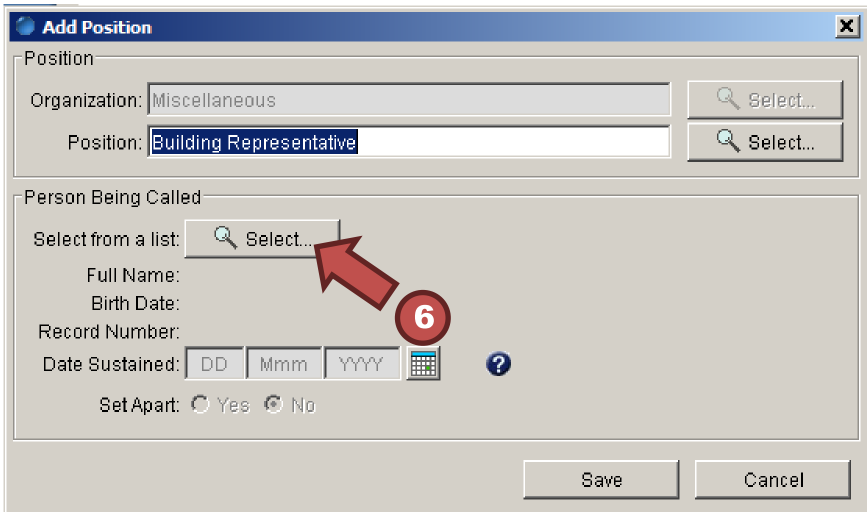
Important: Do not use the Custom Positions option for assigning positions. Custom positions are not valid in the FIR system.



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

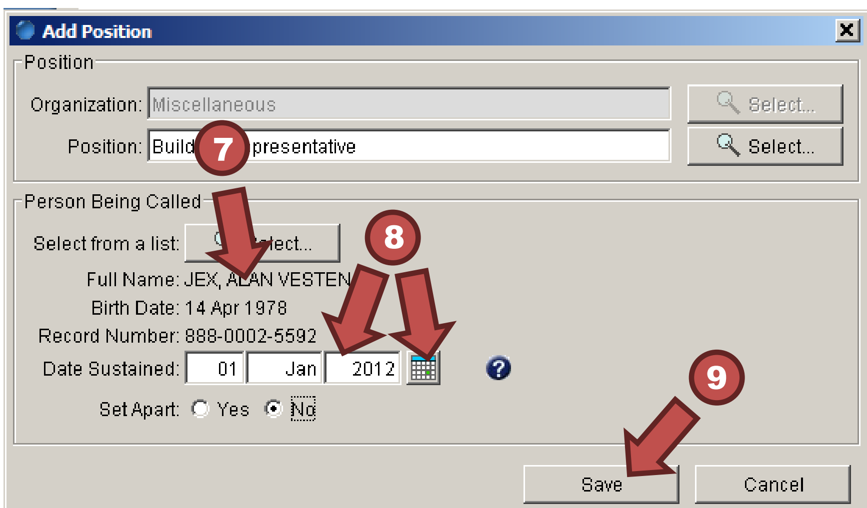


Step 5: Select the appropriate position from the list and click OK (see the FIR Permissions matrix for roles that have access to FIR).



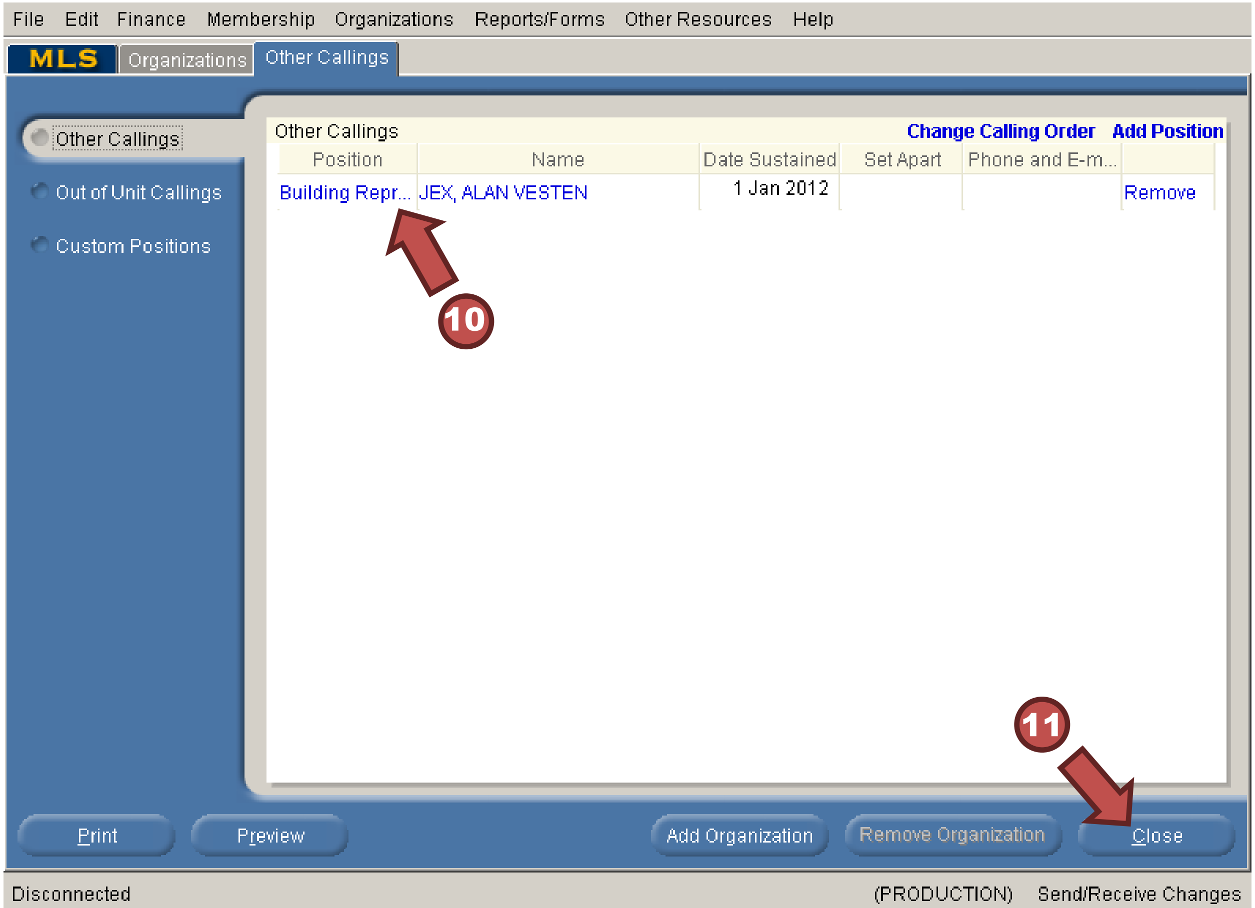
Step 6: Click Select... under the Person Being Called heading to select the member you are assigning to the position you selected in step 5.

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.

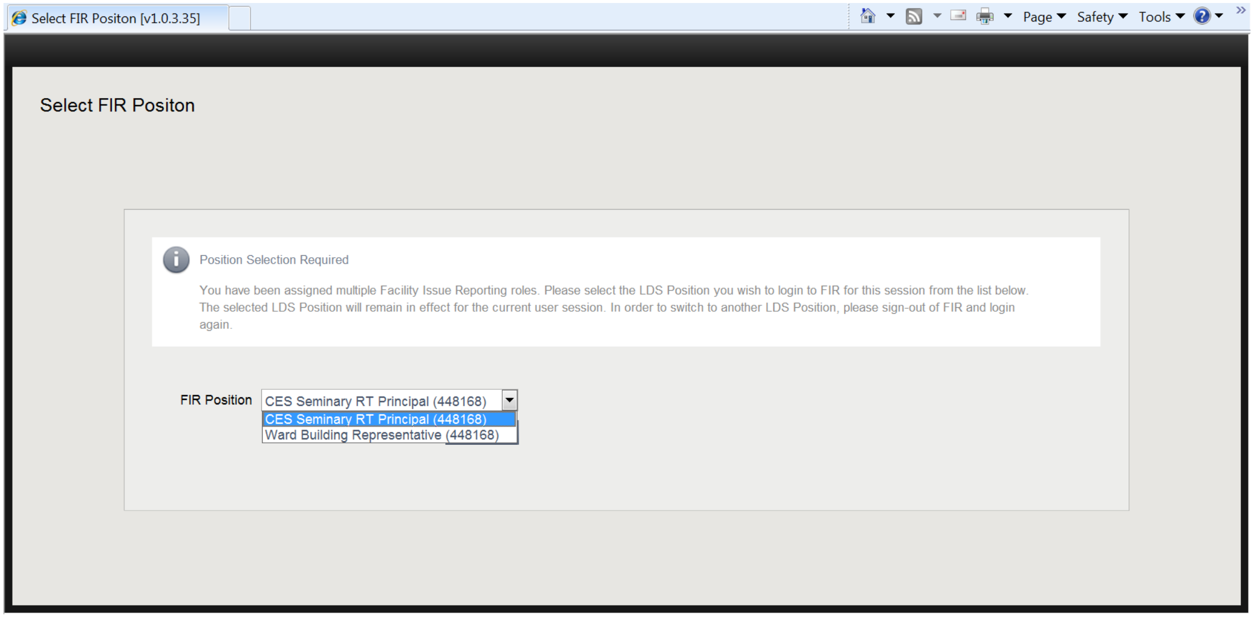
Please be aware that it may take some time for the updates to become effective. Below is a typical timeframe for this to happen:

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.

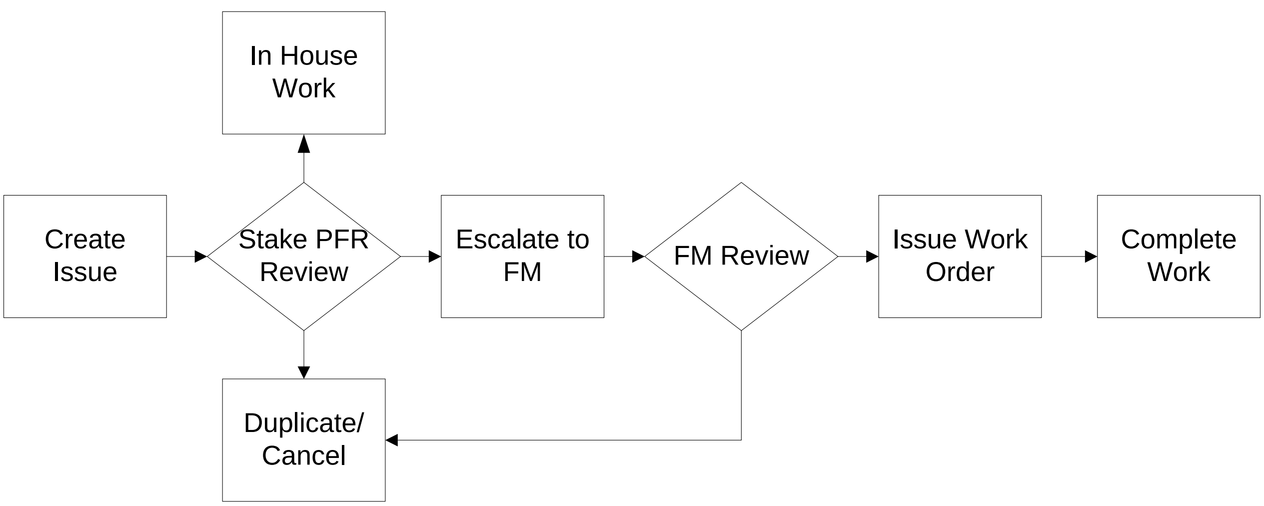
Persons with Multiple Positions: If a person has multiple positions that are accessible in the FIR system, the system will prompt them to select the role with which they want to sign in. For example if the person has the position of Stake Physical Facilities Representative and CES Seminary Teacher, FIR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

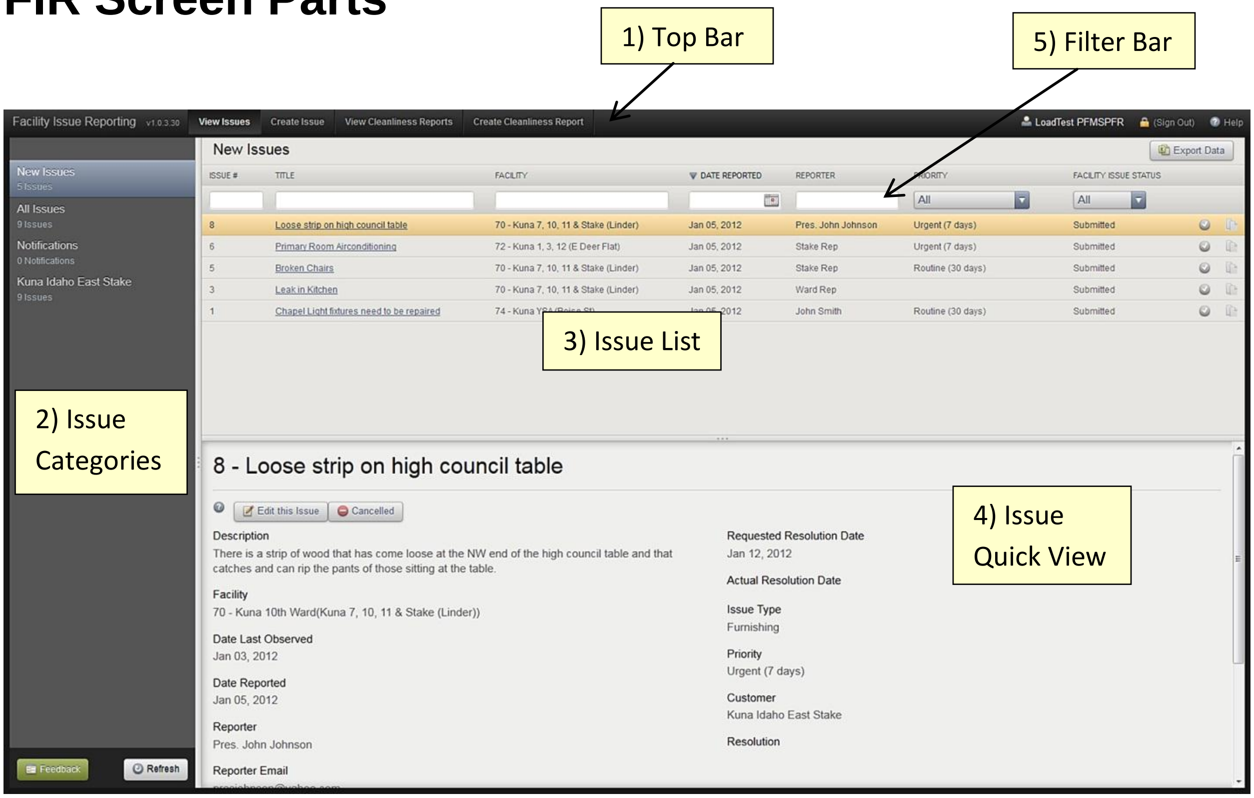
- Accessing the FIR System
- Screen Parts
- Filtering Issues

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



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.

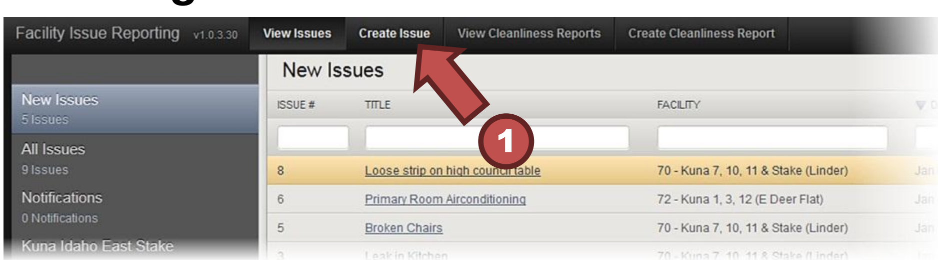
To search using menu fields, click on the arrow on that field, then select a filter option.

Creating and Editing Issues

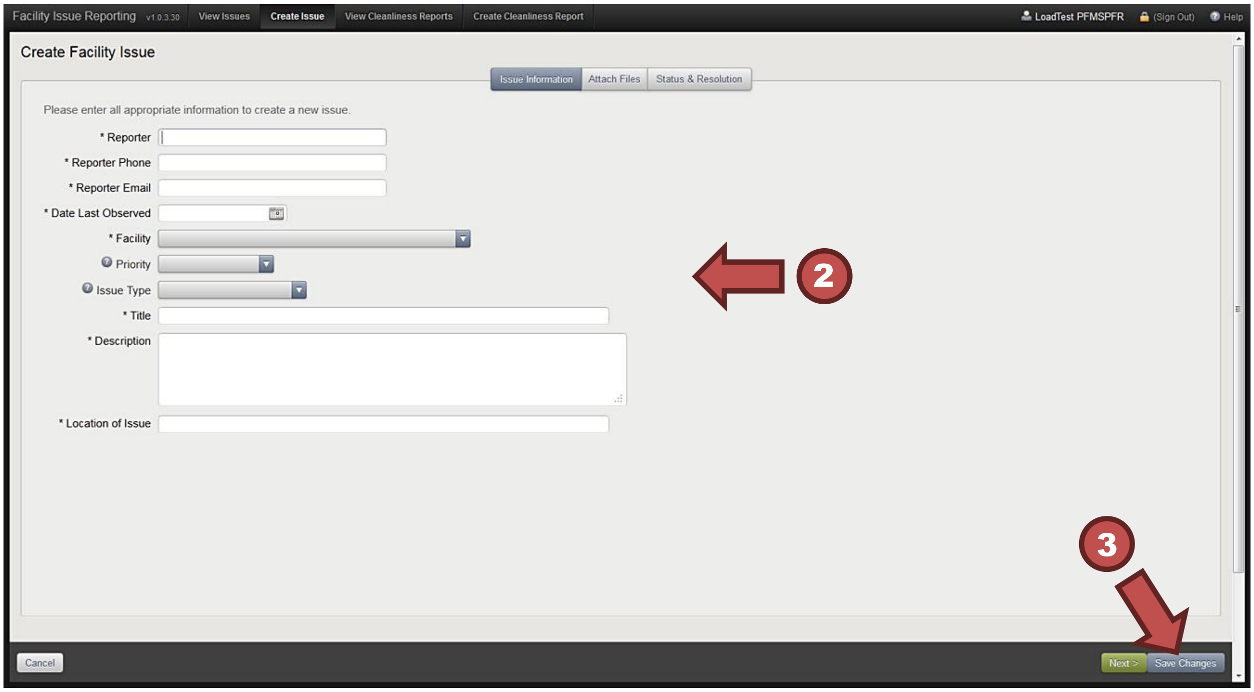
The FIR system provides options that enhance the issue reporting and resolution process. This section will cover the following:

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

Creating Issues



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



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

Adding and Removing Attachments

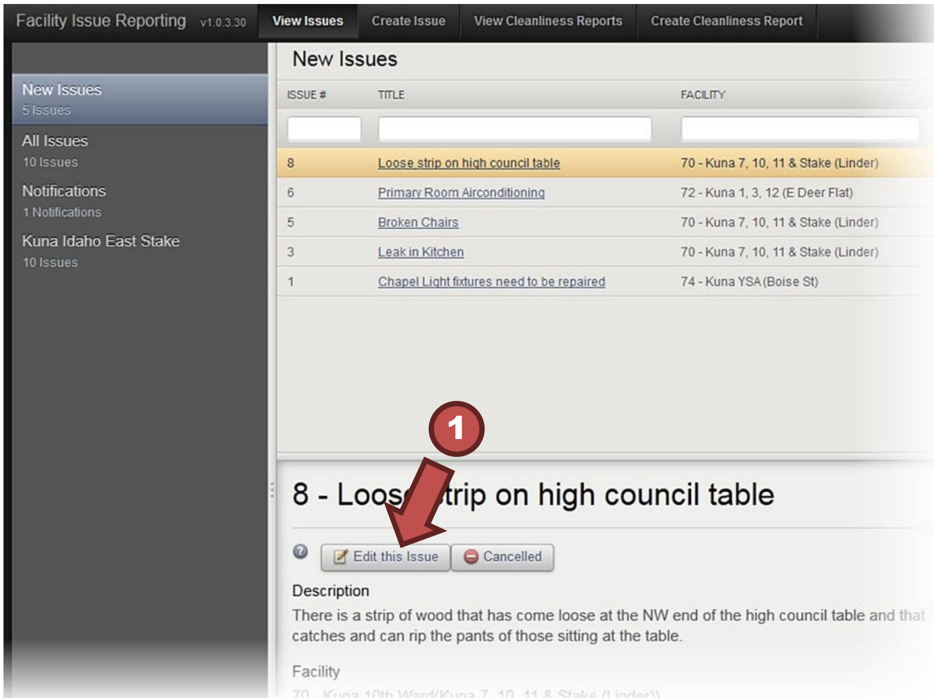
The reporter and escalator can add attachments to an issue until the status changes to Escalated.

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

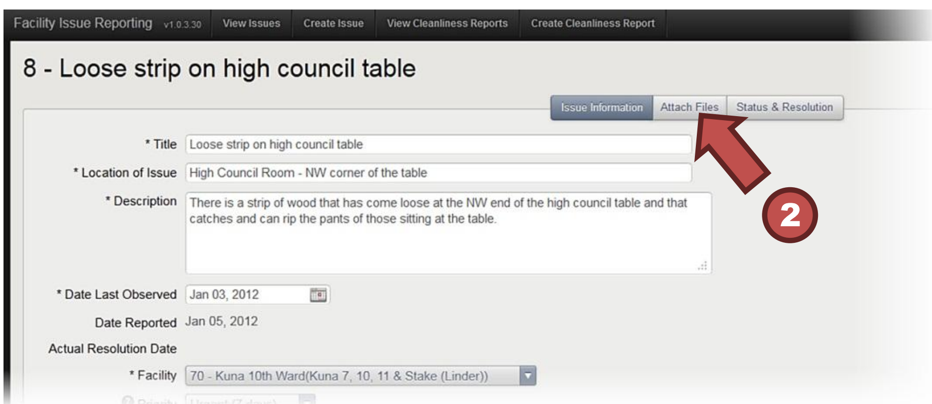
Description	Extension
Power Point Presentation	.ppt
JPEG Image	.jpg
Word Document	.doc
Excel Spreadsheet	.xls
GIF Image	.gif
PNG Image	.png
Adobe Acrobat PDF	.pdf
Microsoft Document like PDF	.xps
Text document	.txt
Visio flowchart or diagram	.vsd

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

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.

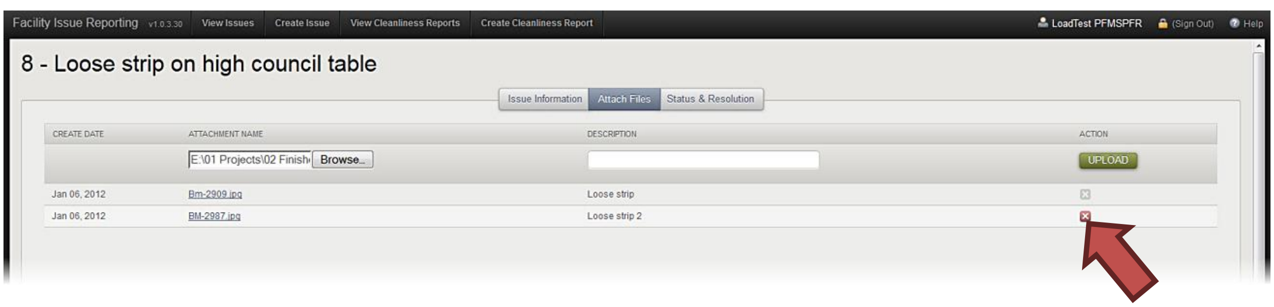
Step 3: Click Browse... to search your computer for the image or document you would like to attach.

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.

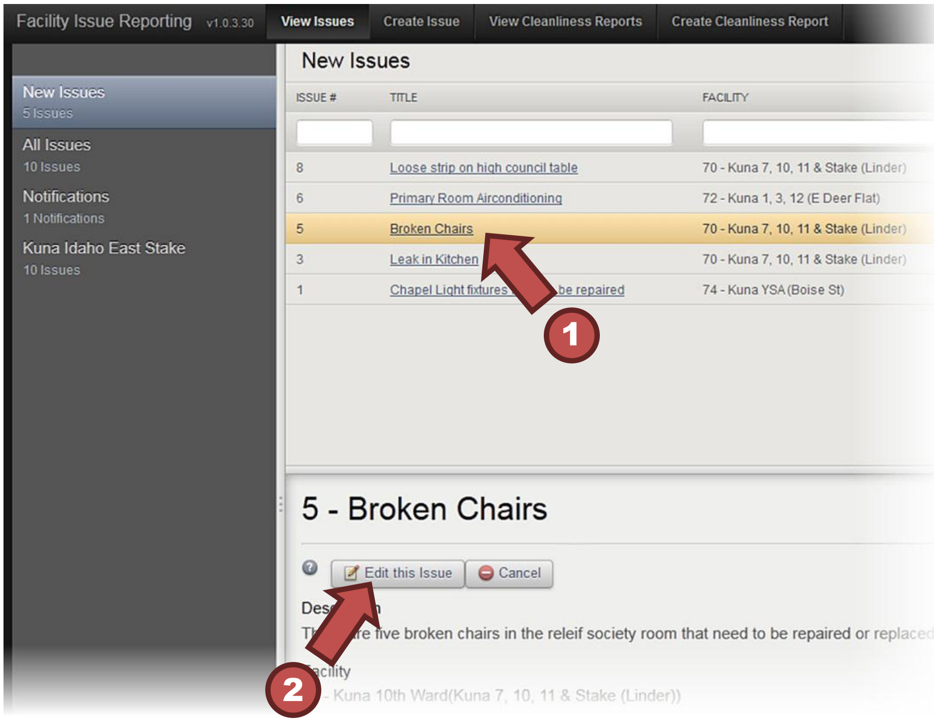


Editing Issues

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:

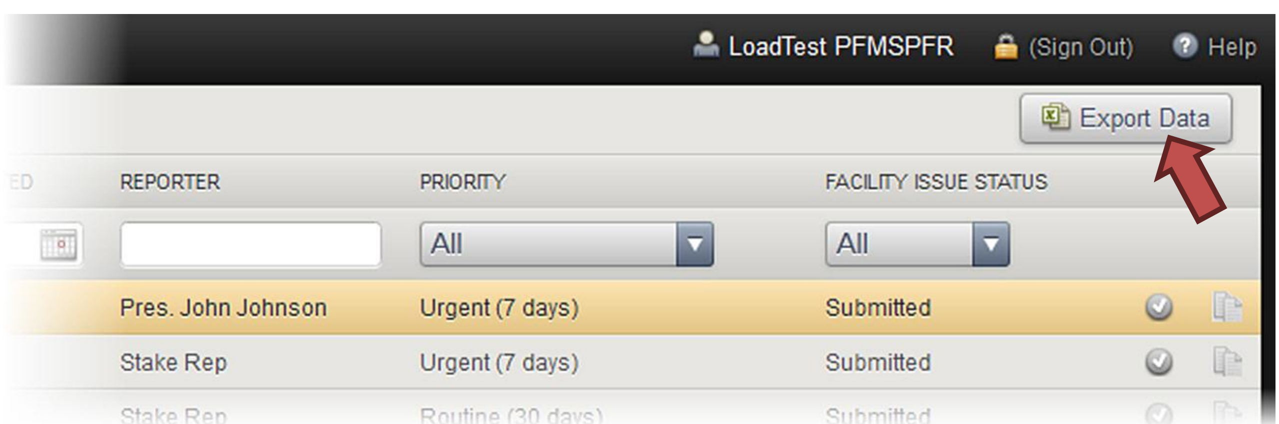


Step 1: Highlight the issue from the issue list.

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.

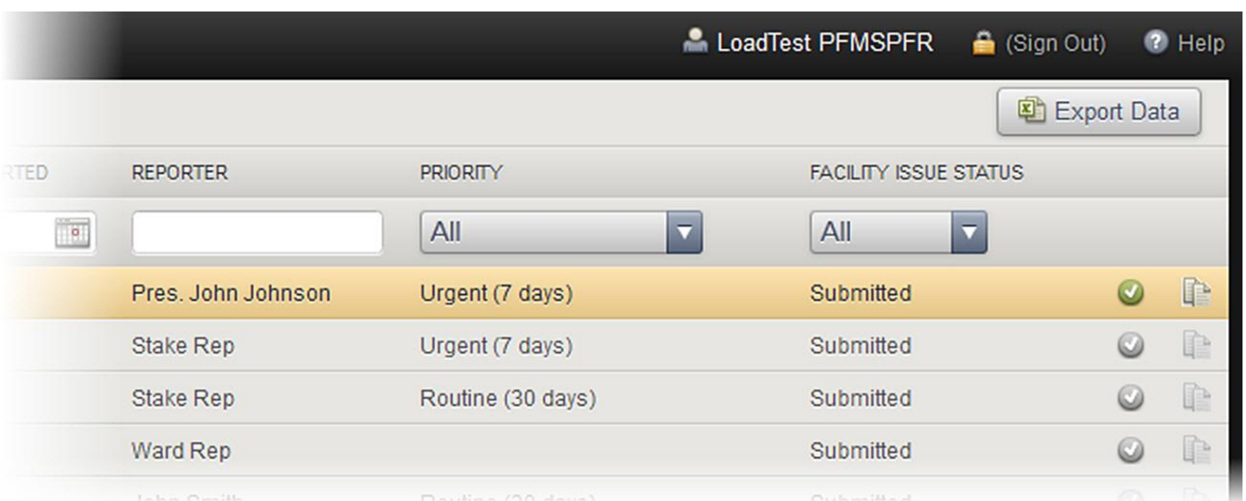
Working with Issues

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

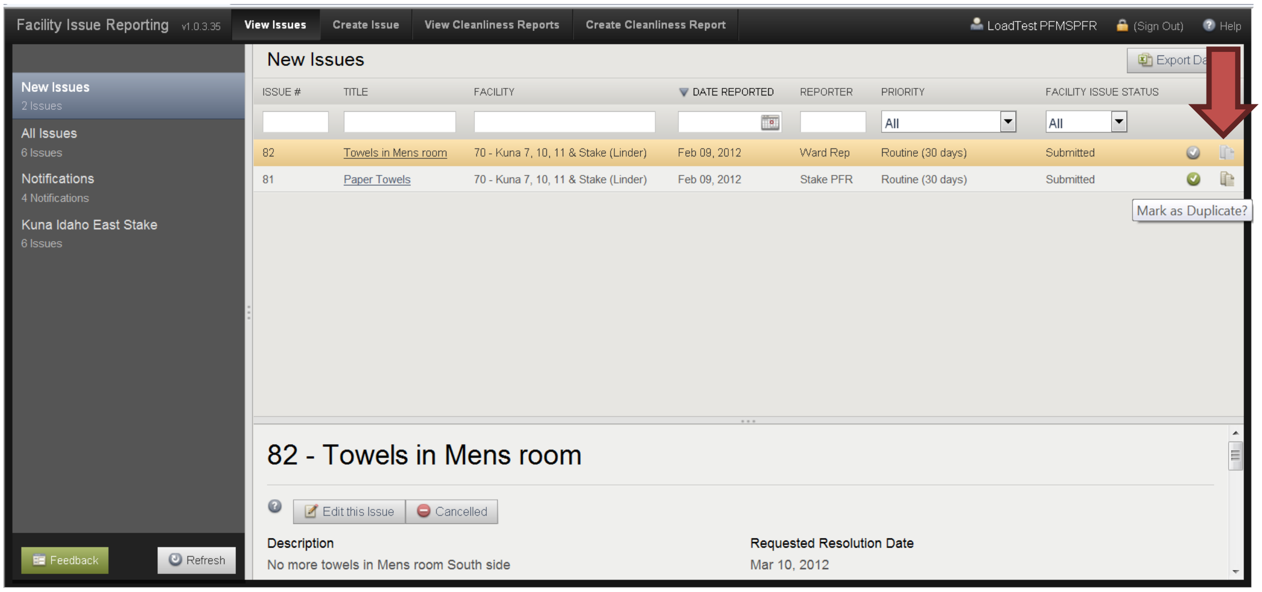
Marking Issues as Read

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.

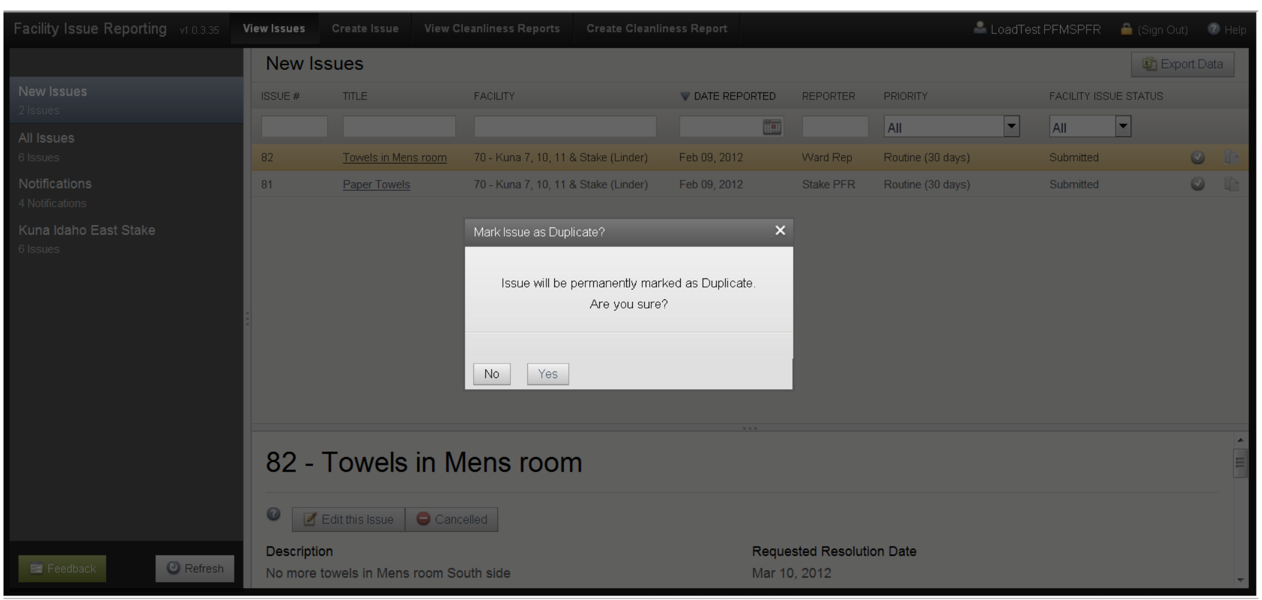


Marking Issues as Duplicates

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:

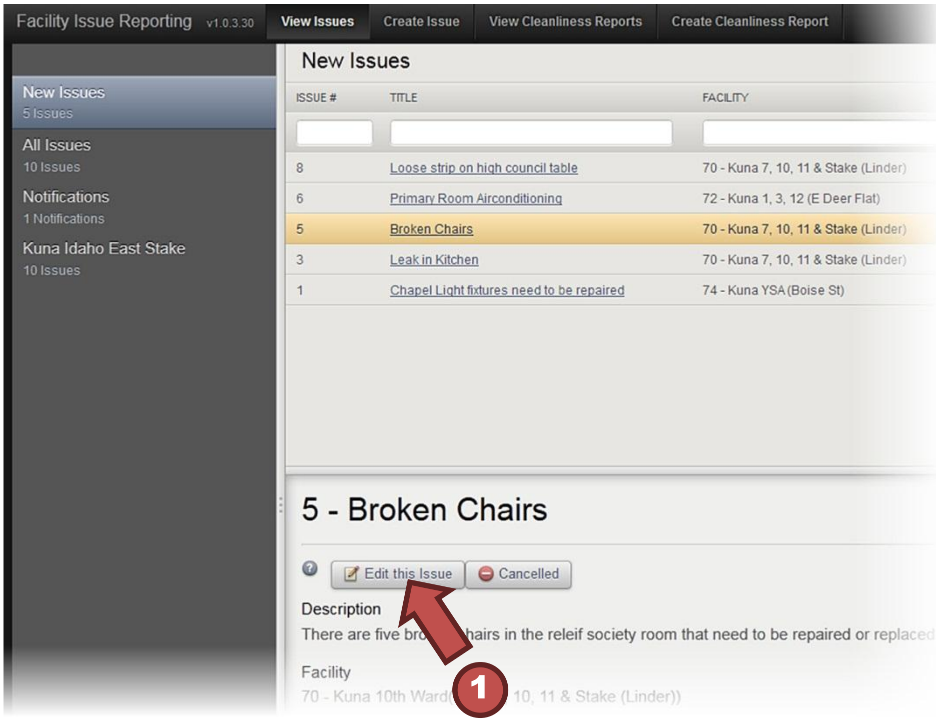
- Submitted – Waiting review by the escalator (Stake PFR)
- Escalated – Forwarded to the FM Office for review/work
- Open - Accepted by the FM Office in FMAT
- Cancelled – Not accepted
- Duplicate – Issue reported matches an already existing issue
- Closed – Work completed

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.

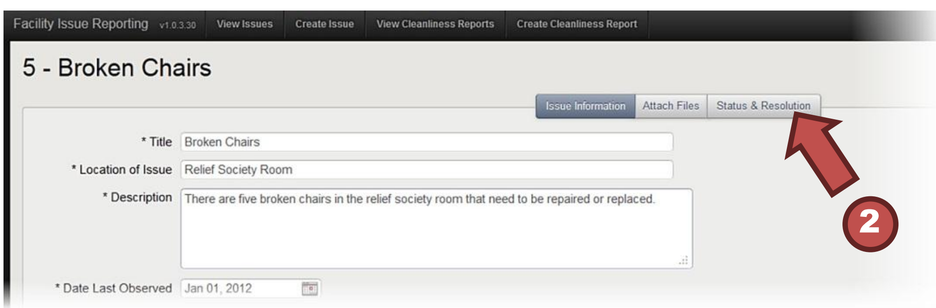
Note: Escalated issues can only have their statuses changed through FMAT by the FM, AA, or Help Desk.

Escalating Issues

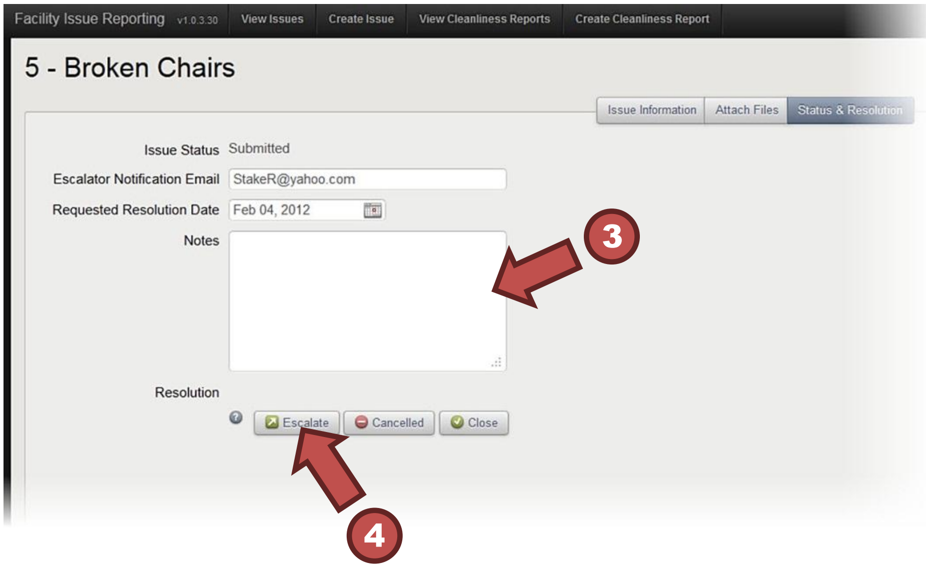
If the Escalator determines that an issue should be addressed by an FM Office, they can escalate the issue by doing the following:



Step 1: Open the issue for editing.



Step 2: Click the Status & Resolution tab.



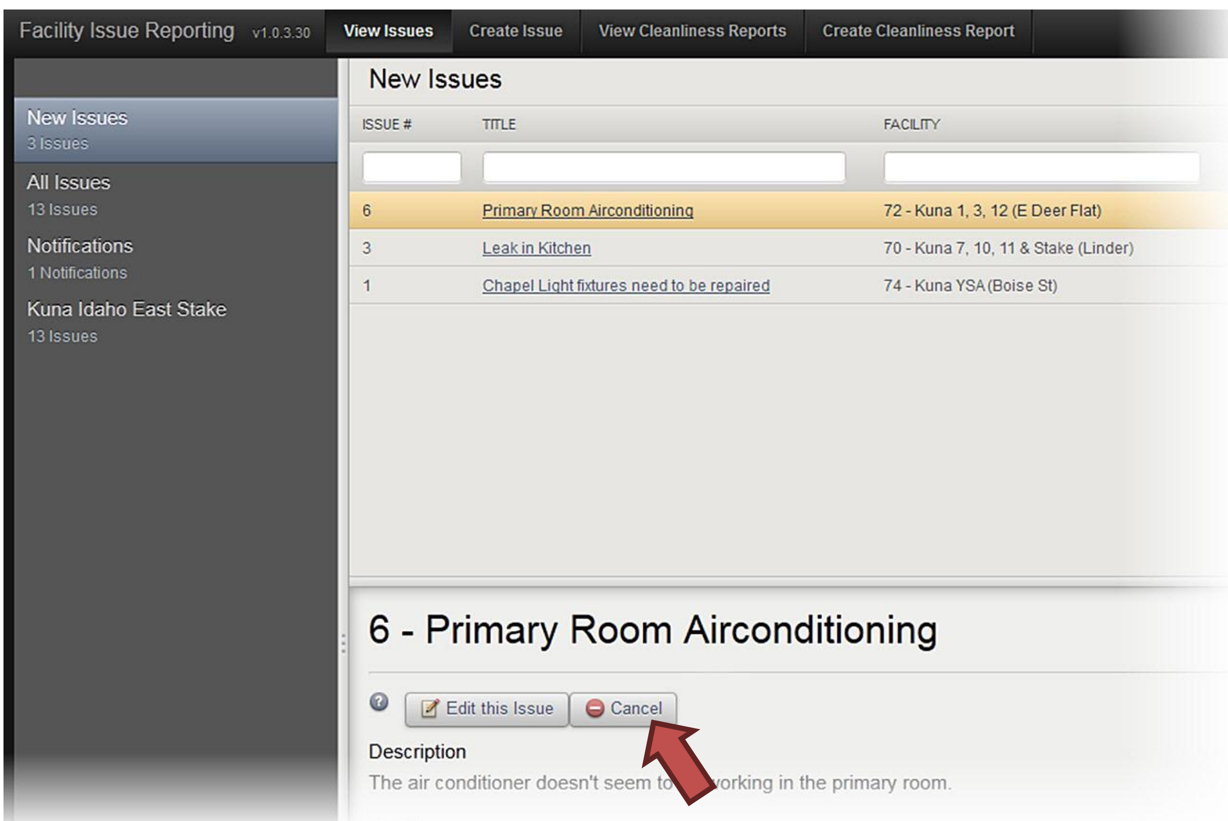
Step 3: Enter notes or comments to clarify the issue for the facility management office in the Notes field.

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.



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

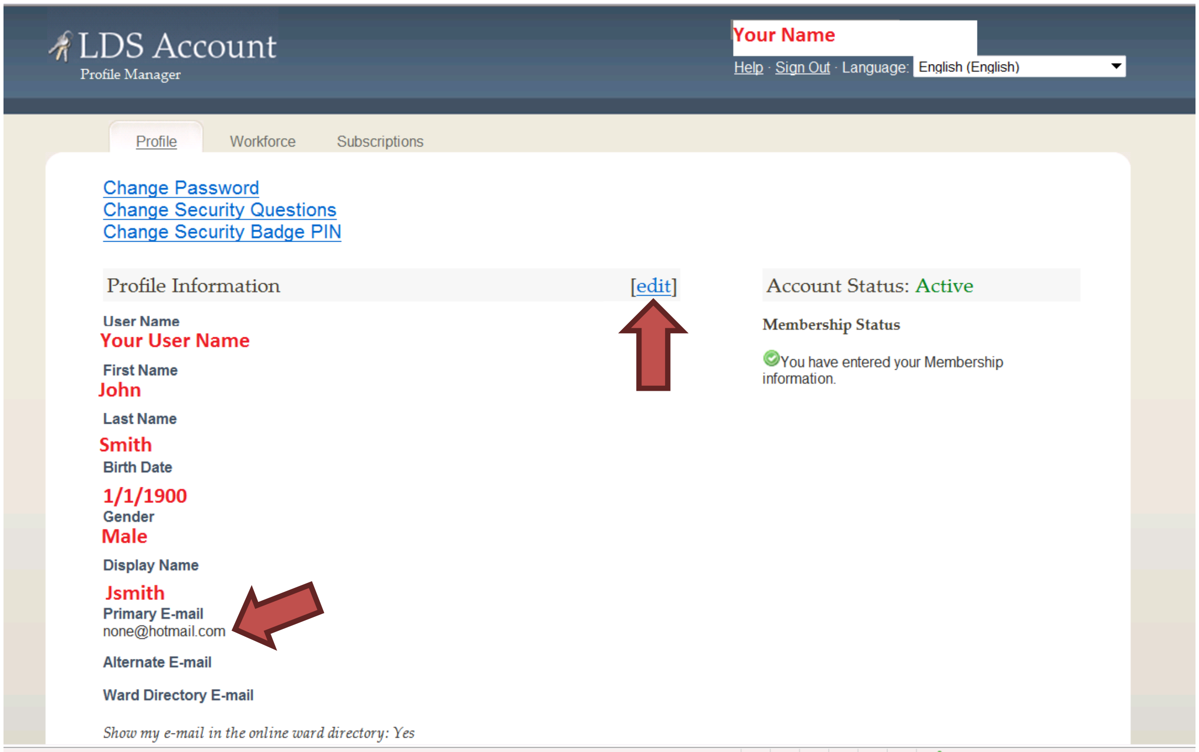
When the status of an issue changes, the FIR system notifies reporters and escalators by email. The chart below shows who receives event notifications:

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.

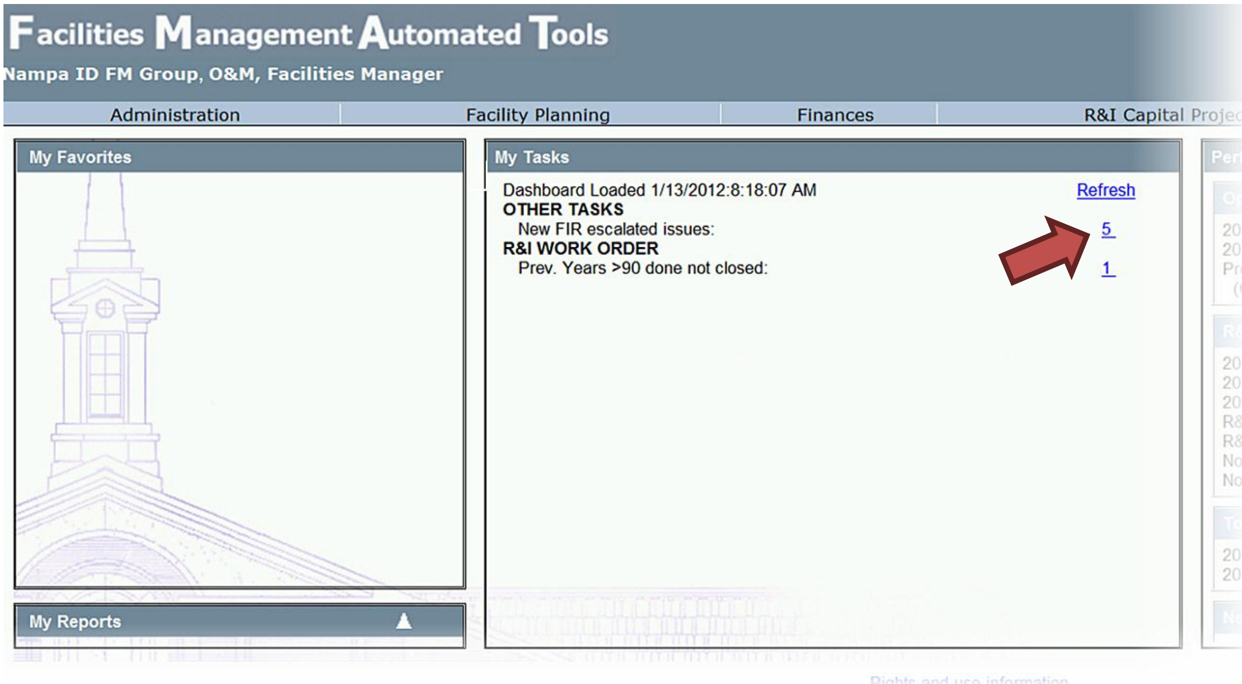
FIR and FMAT

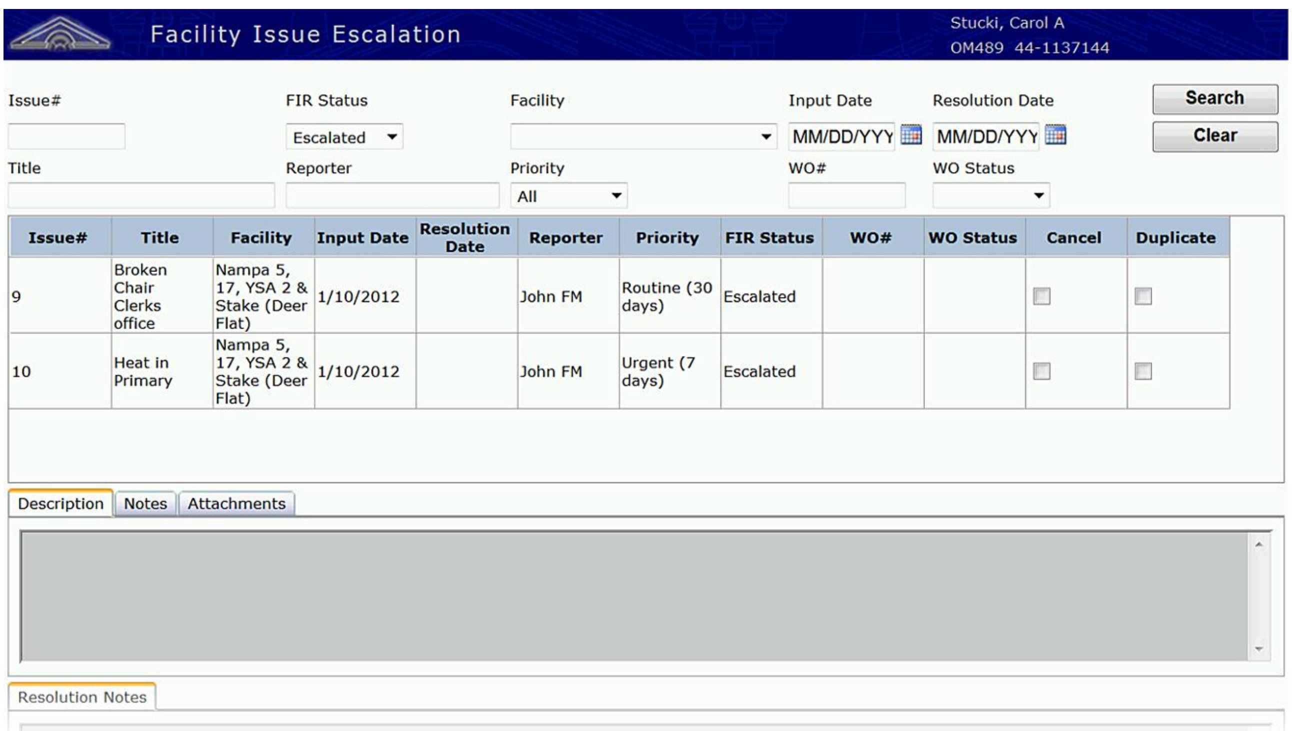
The FIR system integrates with FMAT to streamline reporting and resolution. Only the facility manager, administrative assistant, regional facility manger, Area O&M manager, and Help Desk will be able to see the following FMAT screens. To help you understand how the FIR system integrates with FMAT, this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

- Viewing escalated issues
- Parts of the escalation screen

Viewing Escalated Issues

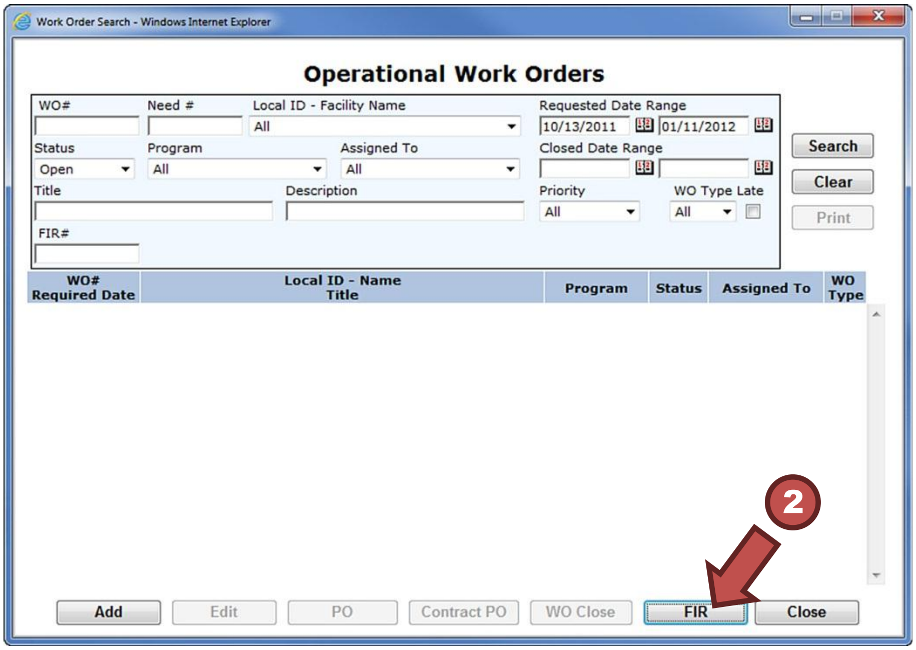
Facilities managers, assistant facilities managers, and administrative assistants will see the number of recently escalated FIR issues on the dashboard when they log into FMAT. Clicking on the number in the right column will take the user to the Facility Issue Escalation Screen where they can view new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





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.

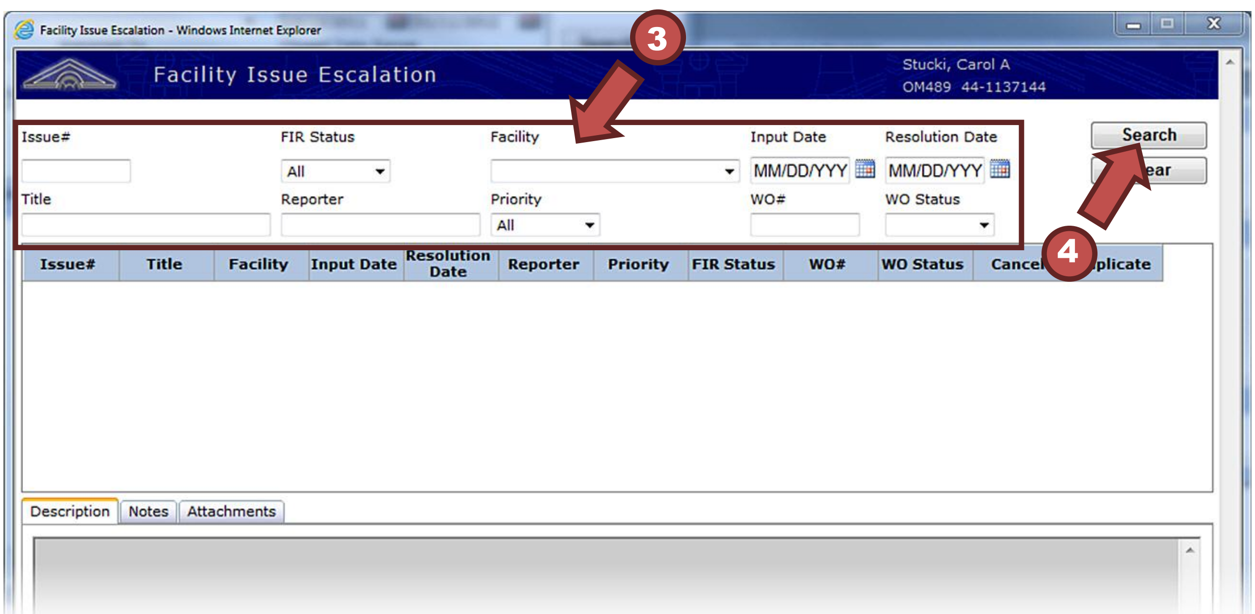
To view issues that users have reported using the FIR system, do the following:



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.

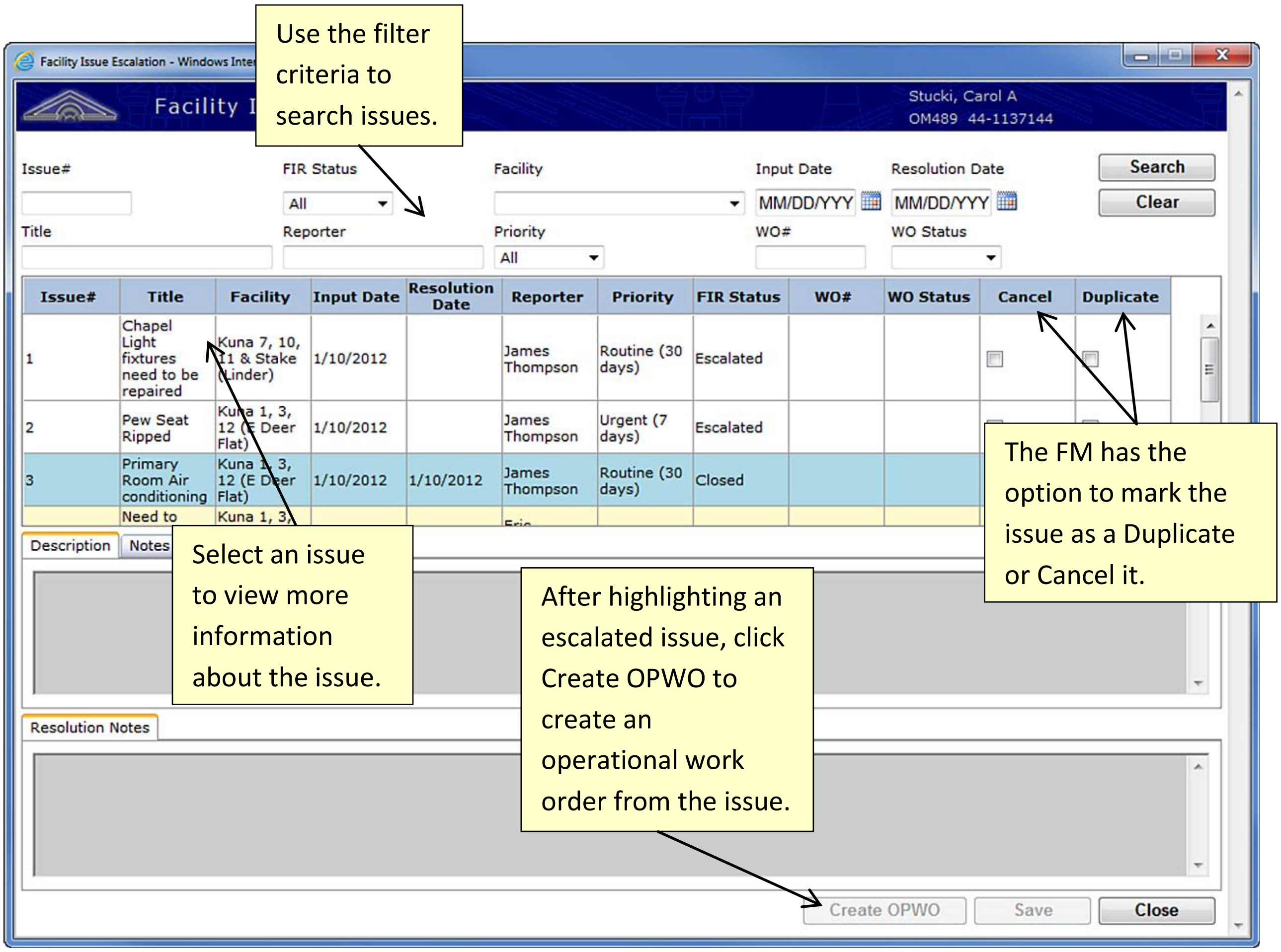
Clicking on this button will open the Facility Issue Escalation screen.



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.

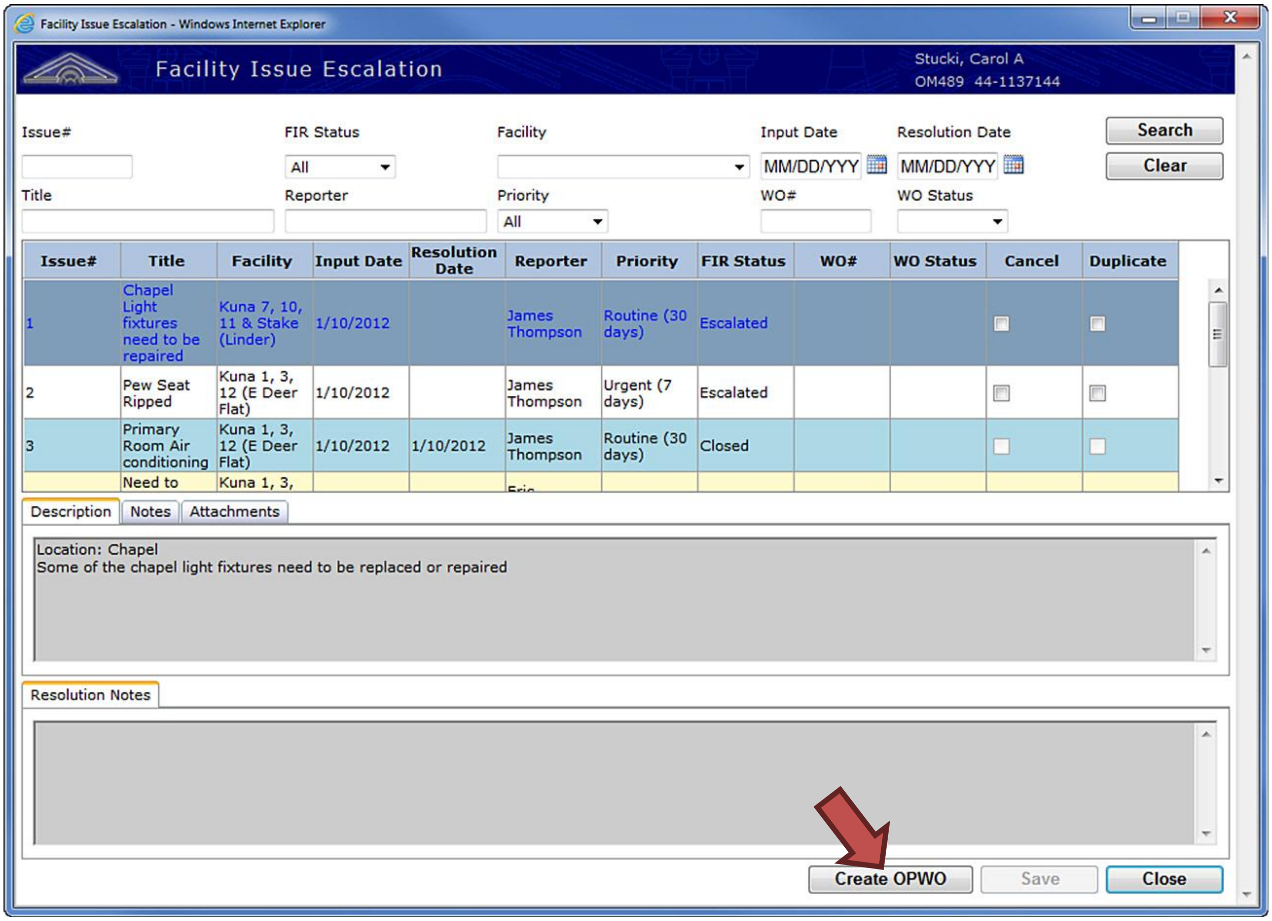
Parts of the Escalation Screen



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.

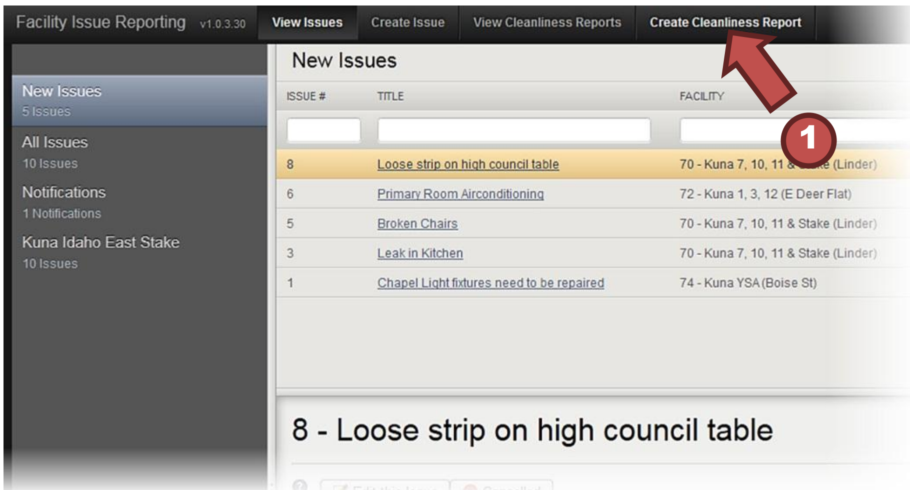


At this time an Operational Work Order can be created by clicking on the Create OPWO button. Most of the needed data will already be populated. Multiple Work Orders can be created from a single FIR issue.

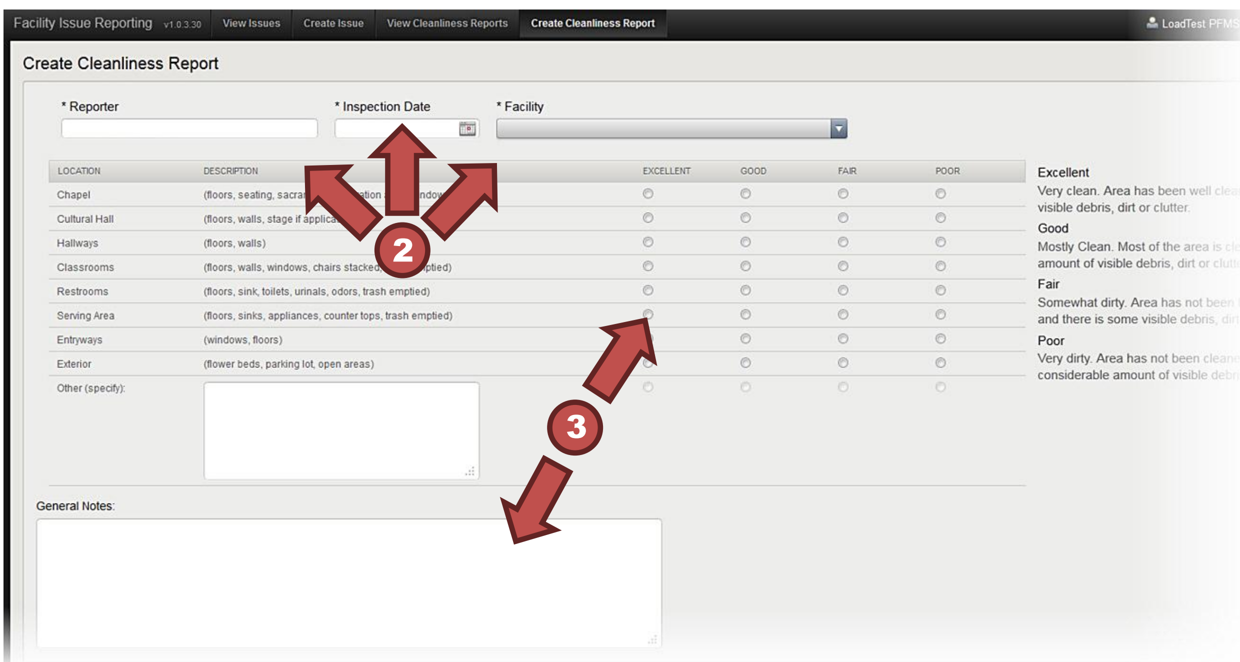
Important: After creating the OPWO, you will need to click Save on the work order screen in order for FMAT to create the work order.

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:

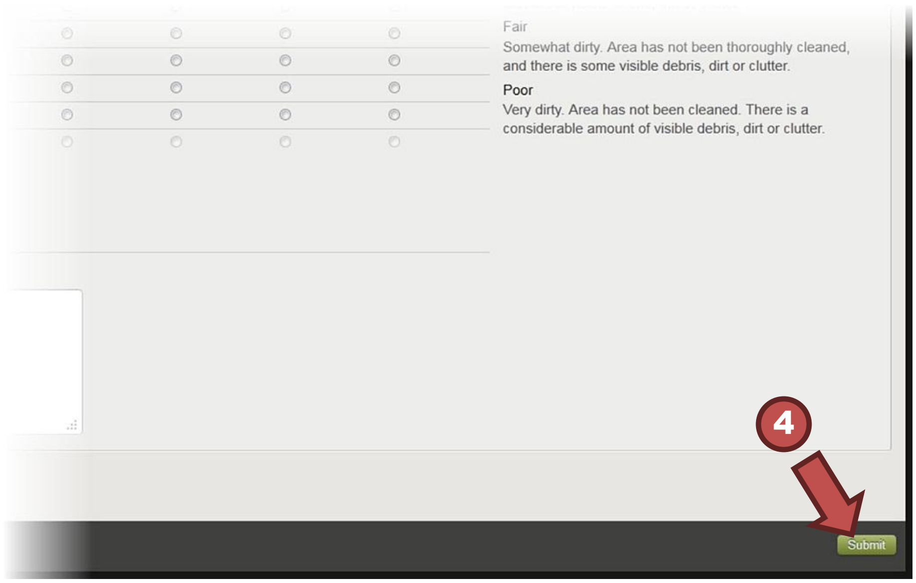


Step 1: Click Create Cleanliness Report in the top bar of the FIR system to bring up the Create Cleanliness Report screen.



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

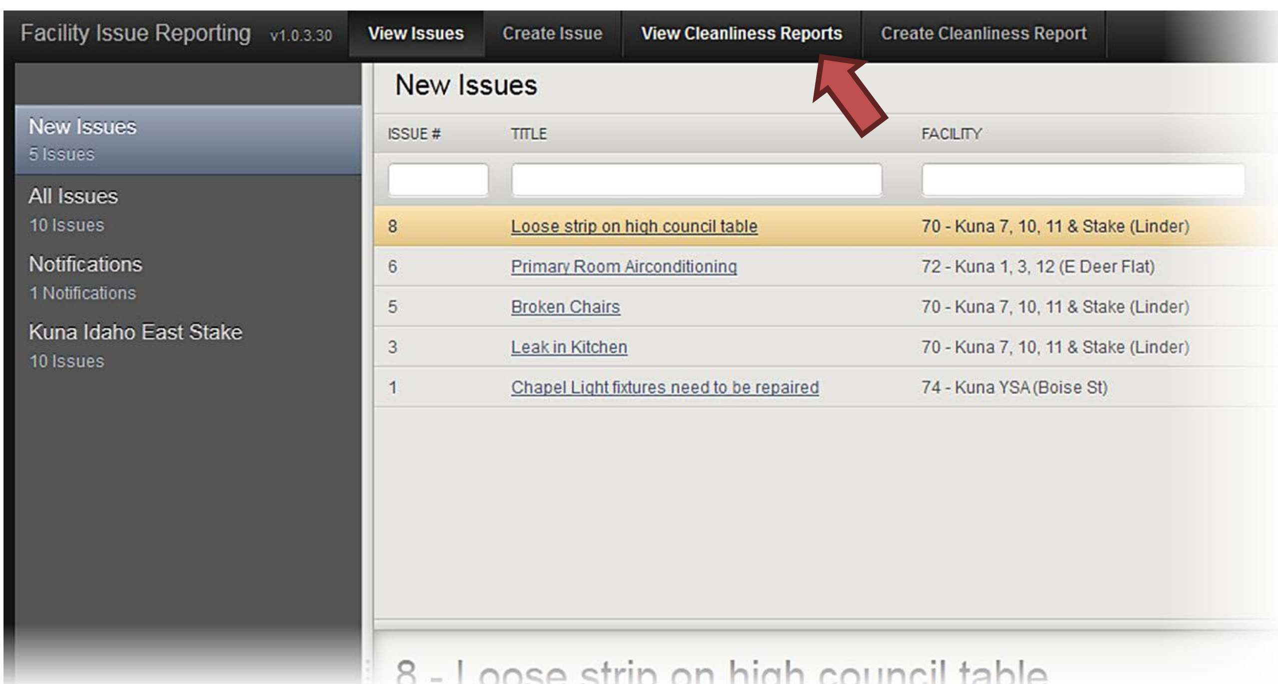
Step 3: Mark the appropriate rating buttons and enter notes for information or clarification.



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.



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