This job aid provides step-by-step instructions for using the Owned Facility Review wizard to view and update existing owned facility data.
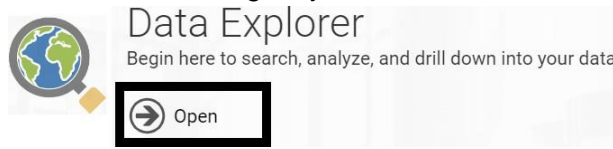
Contents

Overview

The owned facility review wizard allows users to view and update all tables associated with existing owned facilities. FPMT will guide you through a sequence of steps to review/edit data.

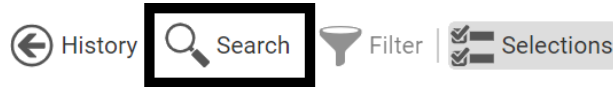| Step	Action	Additional Information
1	Start business process wizard	Use the search option to find your agency and select owned facility review business process wizard from the agency menu options.
2	Review/edit owned facilities	Review and edit data if needed.
3	Review changes and exit business process wizard	Use the data review section to review your changes. ✓ Select save and close to exit the business process wizard. ✓ You must go through the entire wizard and select save and close in the data review section in order to save your changes to the database.

Start Business Process Wizard

The owned facility review wizard is available from the agency menu.

1. Select: Open.

Data Explorer
Begin here to search, analyze, and drill down into your data

➔ Open

2. Select: Search.

History | Search | Filter | Selections

T

3. Select: Filter by.
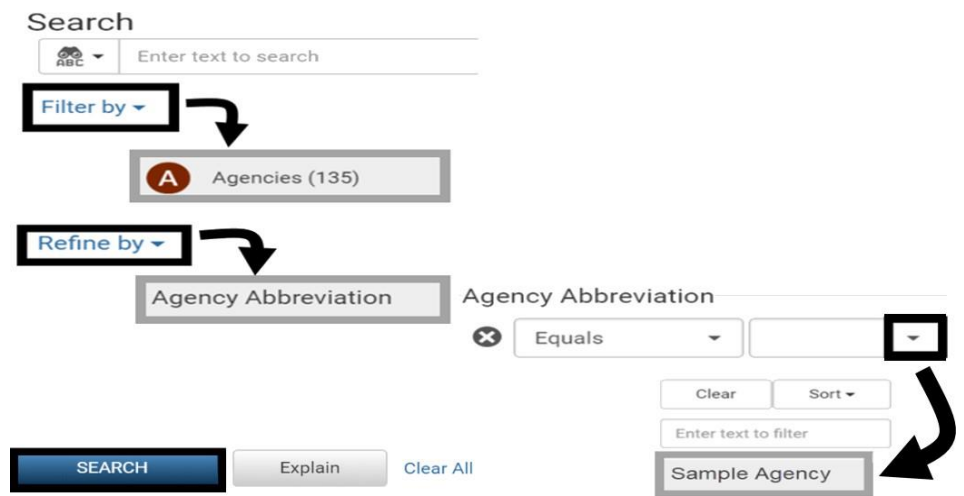➔ FPMT will display a list of criteria.
4. Select: Agencies.
5. Select: Refine by.
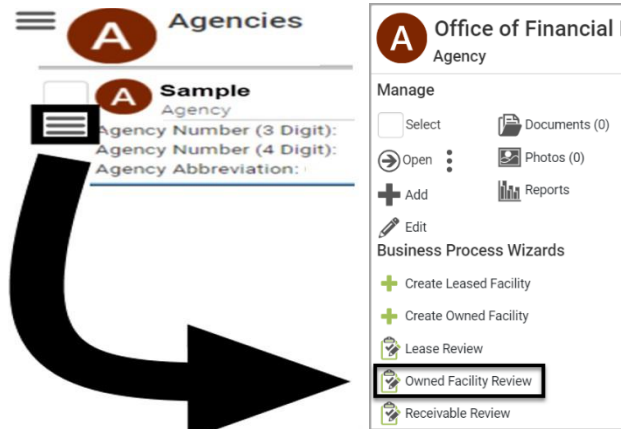**6. Select:** Agency Abbreviation.
➔ FPMT will display additional options depending on your search criteria.
7. Select: Search.

Search

ABC ▾ | Enter text to search

Filter by ▾

Ⓐ Agencies (135)

Refine by ▾

Agency Abbreviation

Agency Abbreviation

✕ Equals ▾ | ▾

Clear | Sort ▾

Enter text to filter

Sample Agency

SEARCH | Explain | Clear All

8. Select: Menu.
9. Select: Lease review.

☰ Ⓐ Agencies

Ⓐ Sample
Agency
Agency Number (3 Digit):
Agency Number (4 Digit):
Agency Abbreviation:

Ⓐ Office of Financial M
Agency

Manage

☐ Select | 📄 Documents (0)
➔ Open ⋮ | 🖼 Photos (0)
➕ Add | 📊 Reports
✏ Edit

Business Process Wizards

➕ Create Leased Facility
➕ Create Owned Facility
📝 Lease Review
📝 Owned Facility Review
📝 Receivable Review

Edit Owned Facilities

FPMT will display a list of active owned facilities for the agency.

✓　FPMT will guide you through the sequence of steps to review and edit data for owned facilities.

1. Select: Details.

➜ FPMT will display owned facility details.

➜ Use the search option to find a UFI in the list.

Owned Facilities

Search Owned Unique Facility Identifiers

Enter Search Text

Owned Name	Unique Facility Identifier	Primary Address	City	Details
Test Owned Facility	A27034	123 4th Ave W	Olympia	
Testing New Facility/VL	A27039	100 Fair St	Clarkston	

2. Review/Edit: Owned facility details.

➜ Use the scroll bar to review/edit additional data.

3. Select: Next.

➜ FPMT will display an error message if there are data validation issues that you need to correct.

Owned Facility

Name

Test Owned Facility

Description

Agency Assigned Regional Name ⑦

Agency Assigned Regional Number ⑦

Agency Assigned Common Name ⑦

Agency Assigned Number ⑦

Agency Assigned Associated Complex, Campus, Regional Center ⑦

Square Feet ⑦

1,500

◀ Previous　　Next ▶　　Cancel Changes

FPMT Owned Facility Review Wizard
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Edit Facility

FPMT will display the facility associated with the owned facility.

1. **Review/Edit:** Facility details.

➔ Use the scroll bar to review/edit additional data.

2. **Select:** Next.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

Edit Facility Details

Name

Test Facility

Description

Primary Address (?)

123 4th Ave W

Secondary Address (?)

Alternative Address (?)

City

Olympia

City - Out of State (?)

County

Thurston

◄ Previous   Next ►   Cancel Changes

Edit Condition Matrix

FPMT will display any condition matrices associated with the owned facility.

1. **Select:** Details.

➔ FPMT will display condition matrix details.

➔ If you do not want to review/edit your condition matrix, select next to go to the next step in the business process wizard.

Condition Matrix

Condition Matrix Name	Details	Delete
Test UFI - FY 2024	↗	🗑

2. Review/Edit: Condition matrix details.

➔ Use the scroll bar to review/edit additional data.

3. Select: Save changes.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

4. Select: Next

Edit Condition Matrix Details

Name
Test UFI - FY 2024

Description

Date of Assessment
3/1/24

Facility Support and Response Time
Adequate - Response to most service needs, including limited non-maintenance activities, is typic... ▾

Satisfaction
Adequate - Satisfied with facilities- related services, usually complimentary of facilities staff. ▾

Preventive vs. Corrective Maintenance
Adequate - 75–99% ▾

Maintenance
Adequate - A well-developed PM program: most required PMs are done at a frequency slightly les... ▾

Interior
Adequate - Clean/crisp finishes. ▾

SAVE CHANGES   Cancel Changes

‹ Previous   Next ›   Cancel Changes

Edit Owned Spaces

FPMT will display a list of active spaces for the owned facility.

1. Select: Details.

➔ FPMT will display space details.

➔ If you do not want to review/edit your space(s), select Save Changes to go to the next step in the business process wizard.

Owned Spaces

Space Name	Space ID	Details	Delete
Test space	001	↗	🗑

Add New Space

‹ Previous   Next ›   SAVE CHANGES   Cancel Changes

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2. Review/Edit: Space details.

➔ Use the scroll bar to review/edit additional data.

3. Select: Save changes.

➔ The sum of all space square feet (including any receivable contract square feet) cannot exceed the total owned facility square feet.

➔ FPMT will display an error message if there are data validation issues that you need to correct.

Add New Space

You can add additional spaces.

1. Select: Add new space.

➔ FPMT will display lease space details.

➔If you are reporting available space, ensure you decrease the square feet in your original space before adding a new space table.

2. Input: Name.

➔ Use the Space ID.

➔ Description is optional.

3. Input: Space ID

➔ Agency Acronym-UFI-Space Number.

➔e.g., DSHS-A27122-1

➔Use sequential space numbers if there is more than one space (e.g., 1, 2, 3).

4. Input: Square Feet

5. Input: Square Feet Measurement type.

6. Input: Primary Space Type.

Edit Space Details

Name
Test space

Description

Unique Facility ID
A27034

Space ID ?
001

Receivable Lease Number ?

Tenant ?
Office of Financial Management - 105

Other Tenant ?

Square Feet ?
1,250

SAVE CHANGES   Cancel Changes

Add New Space

‹ Previous   Next ›   Cancel Changes

Name

Description

Space ID ?

Square Feet ?

Square Feet Measurement Type

Primary Space Type ?

➔ Secondary Space Type is optional.
➔ Additional Space Type is optional.

Secondary Space Type ⑦

[▾]

Additional Space Type ⑦

[▾]

7. Input: Available Space
➔ Defaulted to No.
➔ Annual Full Service Rate per Square Foot and Available Occupancy Date fields become required when Available Space is Yes.

Available Space ⑦

[No   ▾]

➔ Available Space Type is optional.
➔ Backfill is optional.

Available Space Type

[▾]

Backfill

[▾]

8. Input: Workstation counts.
➔ This data is required for facilities that are in scope for the Six-Year Facilities Plan.
➔ Select ⑦ for definitions.

Number of Offices (Required For Six-Year Plan) ⑦

[   ]

Number of Cubicles (Required For Six-Year Plan) ⑦

[   ]

Number of Touchdown Spaces (Required For Six-Year Plan) ⑦

[   ]

➔ Annual Full Service Rate per Square Foot and Available Occupancy Date are required when Available Space is Yes.
➔ Additional fields related to available space are optional.
➔ Agencies are encouraged to provide as much detail as possible about their available spaces.

Annual Full Service Rate per Square Foot ⑦

[   ]

Available Space Status

[▾]

Available Occupancy Date

[📅]

Available Shared Resources ⑦

[   ]

Available Furniture ⑦

[   ]

Building Access/Security

[▾]

Near Public Transportation

[▾]

Parking Available

[▾]

Available As A Separate Lease At Lease Renewal? ⑦

[▾]

9. **Select:** Save changes.
10. **Select:** Next.

SAVE CHANGES   Cancel Changes

‹ Previous   Next ›   Cancel Changes

Data Review and Exit Business Process Wizard

You can expand each area to display specific lease contracts. This provides a quick way to review the information before you save your changes and exit the business process wizard.

1. **Select:** Open.
➔ FPMT will display owned facility information.
2. **Select:** Save and close.
➔ Select Previous to return to an earlier screen for edits.
➔ FPMT will display an error message if there are data validation issues that you need to correct.
➔ FPMT will save all changes and close the business process wizard.
- ✓ Save and close = save all changes and close the business process wizard.
- ✓ Cancel all changes = cancel all changes and close the business process wizard.

History | Filter | Hierarchy

Starting Point — 4
Navigate all data

☰ F **Facilities** — 2

☰ OF **Owned Facilities** — 2

OF **Test Owned Facility**
Owned Facility
Open

OF **Testing New Facility/VL**
Owned Facility
Open

‹ Previous   Next ›   SAVE AND CLOSE   Cancel All Changes