



This job aid provides step-by-step instructions for using FPMT's owned facility creation wizard.

FPMT has been expanded to meet new Governmental Accounting Standards Board (GASB) requirements. In addition to new functionality, system updates include new user roles as well as changes to existing business processes. For more information about system updates, refer to the [What's New with FPMT](#) job aid.

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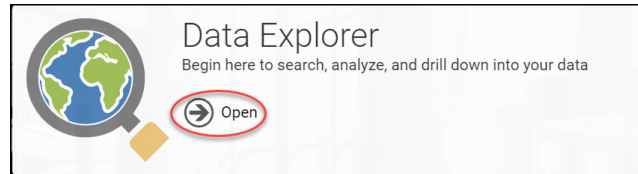
Overview



Which FPMT user roles can create a new owned facility?	<ul style="list-style-type: none"> The Create Owned Facility wizard can only be accessed by users with the Facilities role and edit rights. Users with the Accounting role cannot access this wizard. Per agency discretion, an individual can be assigned both the Accounting and Facilities user roles.
Where do I access the owned facility creation wizard?	<ul style="list-style-type: none"> The Create Owned Facility wizard is accessed via the menu button on the agency tile.
When should I enter a new owned facility?	<ul style="list-style-type: none"> New owned facilities should be entered into FPMT no earlier than one month, and no later than two weeks, prior to the occupancy date.
What should I do if I need to create a new facility in the same location as a previous building that was demolished?	<ul style="list-style-type: none"> Use the Deactivation wizard for the building that was demolished. Use the Create Owned Facility wizard to add a new facility to your portfolio. If the primary address is the same, you must add a secondary address.
What information do I need to create a new owned facility?	<ul style="list-style-type: none"> A copy of the deed A floor plan that shows the total square footage Parcel Number Legislative District
How do I get the new unique facility identifier (UFI) into HRMS?	<ul style="list-style-type: none"> Make sure to select “yes” for the HRMS field in the facility table. The UFI will be uploaded to HRMS after the new facility record has been reviewed for accuracy and approved by OFM. Refer to the UFI Frequently Asked Questions for more information.
Why should I use the wizard?	<ul style="list-style-type: none"> The wizard simplifies the owned facility creation process by guiding you through each step and reducing manual activity in the system. The wizard also includes business rules, or validation checks, to prevent incomplete data and common data entry errors.
Wizard basics: <ul style="list-style-type: none"> The wizard opens in a new window, which will close when you complete the owned facility creation process. Once the window closes, you will need to refresh your original FPMT window to see all of the changes. Once you Save and Close, you cannot go back into the wizard. Make sure to allow enough time to complete the wizard process in one sitting. If you time out during the process, <u>you will lose your data</u>. You navigate through the wizard by clicking the Next or Previous buttons. 	

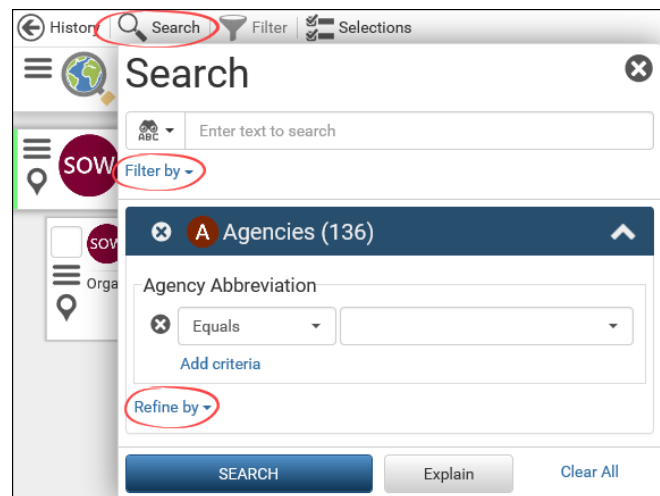
Launch the Owned Facility Creation Wizard

Navigate to the agency tile and launch the owned facility creation wizard.

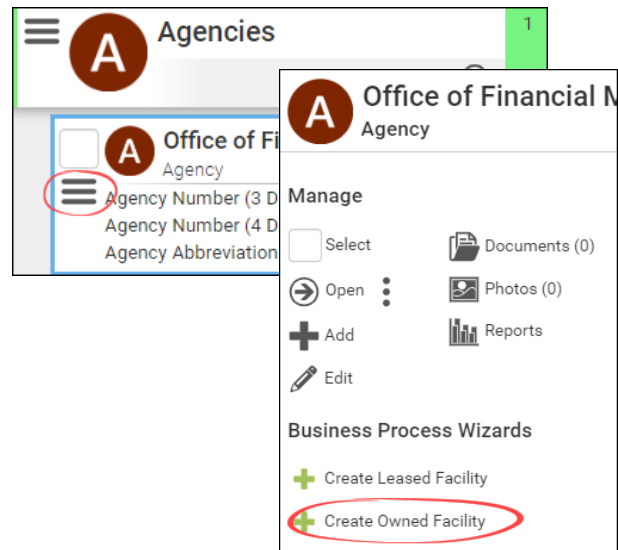
1. Open the Data Explorer module.



2. Select the  Search button on the data explorer tool bar.
3. Select **Filter by** and choose Agencies.
4. Select **Refine by** and choose Agency Abbreviation.
5. Enter the abbreviation.
→ These are [SAAM acronyms](#).
6. Select 




7. Select the  menu button on the agency tile.
8. Select 



Add a New Facility

1. **Enter** agency data. Red fields are system required. Other required fields are noted in this job aid.

→ Additional guidance is available by selecting the information icon 

- Name

→ Use the primary address. If the facility address is not unique, include a building number. (e.g., 1313 N 13th Ave – BLDG 1W165000)

- Primary address

→ This is the legal address. Refer to [USPS Addressing Standards](#).

→ The system will require a secondary address if a facility with the same primary address already exists.

→ The system will only catch duplicate addresses if they are entered exactly the same. If you are entering multiple facilities with the same primary address, make sure to use the same formatting. (e.g., Jefferson St)

- Secondary Address

→ A secondary designator, such as a building number or name.

- Alternative Address

→ Only populate this field if the facility has an address other than the legal address, for example a different mailing address.

Note: If a new facility has the same address as a previous facility that was demolished, you must enter a secondary address.

Edit Facility Details

Name

Description

Primary Address 

Secondary Address 

Alternative Address 

- Property Tax Parcel or Account Number
 - ➔ This information can be found on the county assessor's website.
 - ➔ If there is no parcel number for this facility or it is located out of state, enter N/A.
- Latitude & Longitude (**required**)
 - ➔ FPMT will automatically populate this data after you geocode the facility.
- Legislative District
 - ➔ Based on location of the facility. You can locate the legislative district on the [Legislature's website](#).
- Registered Historic Property
 - ➔ If unsure, refer to the Department of Archaeology and Historic Preservation for more information
- Essential Public Facility
 - ➔ Essential public facility generally refers to public facilities that are typically hard to cite and critical to state government. Refer to [WAC 365.196.550](#), [RCW 36.70A.200](#), [RCW 47.06.140](#) or [RCW 71.09.020](#).

Property Tax Parcel or Account Number [?](#)

Latitude [?](#)

Longitude [?](#)

Legislative District [?](#)

Registered Historic Property [?](#)

Essential Public Facility [?](#)

- Facility Type (Building/Structure)
 - ➔ A building is a facility with at least one wall, a roof and permanent foundation, regardless of occupancy. **Only buildings are included in the facilities inventory.**
 - ➔ A structure is a real property improvement constructed on or in the land, which is not a building.
- Property Class
 - ➔ Auto-populated based on the primary space type with the most square feet in the space table.
- Surplus
 - ➔ Select "yes" if the facility is no longer needed by the agency and can be surplus.

Facility Type

Property Class [?](#)

Surplus [?](#)

- Campus
 - ➔ Is this facility part of a campus? (Yes/No)
- Campus Identification Number
 - ➔ As defined in the Energy Star Portfolio Management System. The format should be the agency SAAM number and campus ID (e.g., 405-0123).
- Conditioned Space
 - ➔ Select Yes if the facility meets the criteria for conditioned space as defined by the Washington State Energy Code. This code defines conditioned space as any facility which has a room or area that is being heated or cooled, containing uninsulated ducts or with a fixed opening directly into adjacent conditioned space.

Campus ?	<input type="text"/>
Campus Identification Number ?	<input type="text"/>
Conditioned Space ?	<input type="text"/>

➔ Populate the following fields with the corresponding value from the Energy Star Portfolio Management System.

- Portfolio Management Identification Number
- Parent Portfolio Management Identification Number
- Energy Use Intensity (EUI)

➔ Refer to the Department of Commerce's [website](#) for more information on Clean Buildings Act compliance criteria.

- Does this facility meet the Clean Buildings Act standard? (Yes/No)

➔ Click the information icon ? for electric vehicle charging port definitions.

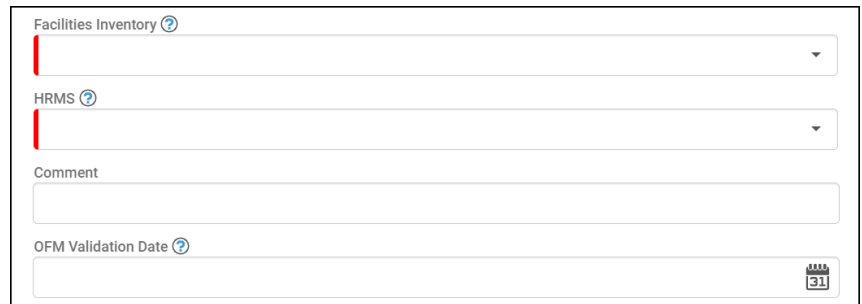
- Number of Level 2 Charging Ports
- Number of Level 3 Charging Ports
- Number of Publicly Available Charging Ports

Portfolio Management Identification Number ?	<input type="text"/>
Parent Portfolio Management Identification Number ?	<input type="text"/>
Energy Use Intensity (EUI)	<input type="text"/>
Does this facility meet the Clean Buildings Act standard?	<input type="text"/>

Number of Level 2 Charging Ports ?	<input type="text"/>
Number of Level 3 Charging Ports ?	<input type="text"/>
Number of Publicly Available Charging Ports ?	<input type="text"/>

- **Facilities Inventory**
 - ➔ Select “yes” if the facility is a building with at least one wall, a roof and a permanent foundation, regardless of occupancy.
- **HRMS**
 - ➔ Select “yes” if the facility serves as a duty station for employees.
- **OFM Validation Date**

➔ All new facilities are saved in pending approval status. OFM must review key data for accuracy and will change the status of the facility to “approved” and populate the OFM validation date.



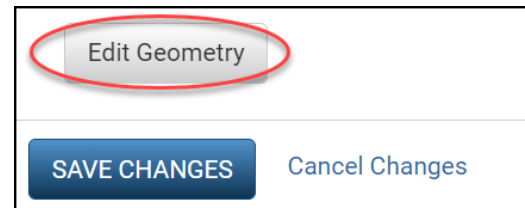
Facilities Inventory ?

HRMS ?

Comment

OFM Validation Date ?

2. **Select Edit Geometry** to geocode your facility (place a point on the map).
 - ➔ You must geocode the facility or manually populate the coordinates.
 - ➔ You will receive an error if you skip this step.



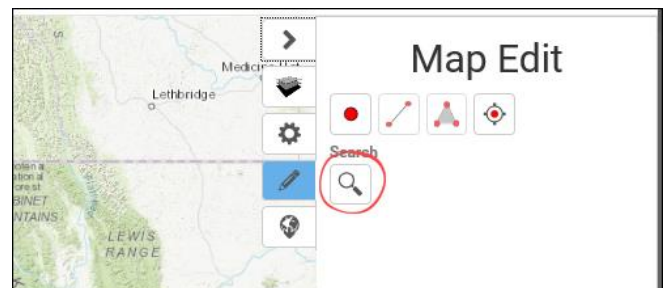
Edit Geometry

SAVE CHANGES Cancel Changes

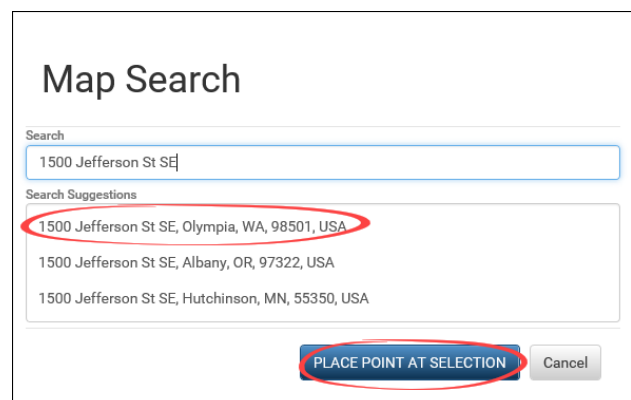
Errors

- Facility must have Latitude and Longitude or be geocoded.

3. **Select the search**  **button.**



4. **Enter** the street address – the system will populate addresses in the dropdown menu.
5. **Select** the appropriate address.
6. **Select Place Point at Selection**



Map Search

Search

1500 Jefferson St SE

Search Suggestions

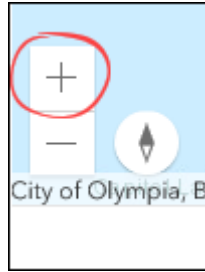
1500 Jefferson St SE, Olympia, WA, 98501, USA

1500 Jefferson St SE, Albany, OR, 97322, USA

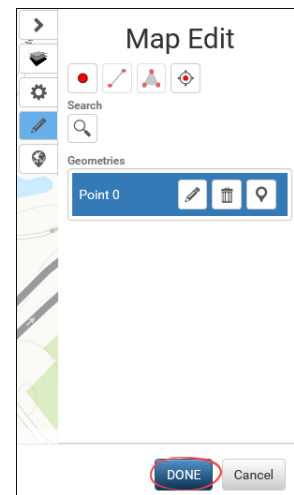
1500 Jefferson St SE, Hutchinson, MN, 55350, USA

PLACE POINT AT SELECTION Cancel

7. Select the **+** button to zoom in on the map.
→ A dark blue dot will appear at the specified address.



8. If the point is in a road, you will need to move it so it is on the actual facility.
- Select** the dot – it will become light blue.
 - Move** the dot to the approximate center of the building.
 - Click/tap** anywhere on the map to change the dot back to a darker blue.
9. **Select Done.**



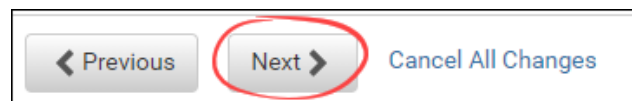
→ In the event that a building shape does not exist yet at the address you have entered, do your best to approximate the location and add a comment.

HRMS ?

Comment

Edit Geometry

10. Select **Next >**






Add a New Owned Facility


1. Enter agency data. Red fields are required.

- Name
 - ➔ Agency SAAM acronym – agency common name (e.g., DSHS – Auditorium)
- Condition Assessment Score
 - ➔ **This field is required for all facilities in the inventory.** (1-5, or NA)
 - ➔ The [Condition Matrix](#) table, which is available later in the wizard, is an optional way to populate this score.
 - ➔ If you skip this field and the matrix, you will receive an error.
- Six-Year Facilities Plan
 - ➔ Select “yes” if this owned facility is in scope for the [Six-Year Facilities Plan](#). Otherwise, select “no.”

2. Navigate to the the next needed form.

- To add a condition matrix, select 
- To add operating costs, select  twice.
- If you do not need to add a condition matrix or operating costs, select  three times to reach the [Owned Spaces](#) section.

Owned Facility

Name 


Condition Assessment Score 


- Superior - 1
- Adequate - 2
- Fair - 3
- Limited - 4
- Emergent Services Only - 5
- Not Assessed - NA

Errors

- Owned Facility must have a Condition Assessment Score or have a Condition Matrix.

Six-Year Facilities Plan 

 Previous

Next 

Cancel All Changes

Condition Matrix

1. Select Add New Condition Matrix

2. Enter data. Red fields are required.

- ➔ Refer to the [Condition Matrix](#) job aid for more information.

3. Select SAVE CHANGES

Condition Matrix

There are no condition matrices



Edit Condition Matrix Details

Name 

Description 

Date of Assessment 

Facility Support and Response Time 



Satisfaction 





Cancel Changes

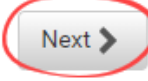
→ Once the condition matrix is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.

Condition Matrix

Condition Matrix Name	Details	Delete
Test Condition Matrix		

4. Navigate to the next needed form.

- To add operating costs, select 
- If you do not need to add operating costs, select  twice to reach the [Owned Spaces](#) section.



[Cancel All Changes](#)

Operating Costs

1. Select Add New Operating Costs

→ Operating costs are required for facilities that are in scope for the [Six-Year Facilities Plan](#). Costs only need to be entered during the plan data collection cycle. If this facility is being entered off-cycle (in an odd year, e.g., 2023), you can skip this table and enter operating costs manually the next year.

Operating Costs

There are **no** operating costs



[Add New Operating Costs](#)

2. Enter data. Red fields are required.



- Name
 - Fiscal year (e.g., FY 2024)
- Operating Costs ID
 - A number to identify the record (e.g., 1)
- Fiscal Year
 - Enter 2024
 - It is critical that this field is properly populated. OFM's baseline report pulls data based on this field.

3. Select SAVE CHANGES

Edit Operating Costs Details

Name
 Description
 Operating Costs ID
 Fiscal Year 
 Parking Annual Cost
 Assessment Annual Cost
 Natural Gas Annual Cost
 Electric Annual Cost
 Garbage Annual Cost
 [Cancel Changes](#)

→ Once the operating costs table is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.

Operating Costs		
Operating Costs Name	Details	Delete
Test Operating Costs		

4. Select Next >

< Previous
Next >
Cancel All Changes

Add a New Space


1. Select Add New Space

Owned Spaces

No owned spaces found


Add New Space

2. Enter agency data. Red fields are required.



→ Select the information  icon for additional guidance.


- Name
 - Tenant SAAM Acronym – Space ID
(e.g., DSHS – 0001)
- Space ID
 - A unique number to identify the space.
(e.g., 0001)
- Tenant

Edit Space Details

Name 

Description

Space ID  

Tenant 

- Square Feet
 - The sum of all space square feet cannot exceed the total square feet in the owned facility.
- Square Feet Measurement Type (dropdown)
- Primary Space Type (dropdown)
 - Refer to the [Property Class & Space Type Categories](#) job aid for additional information.

Square Feet 

Square Feet Measurement Type

Primary Space Type 


- If part of your new space is available for use by another agency, refer to the [Available Space](#) job aid for details on how to populate these additional fields for potential collocation.

→ If Available Space is marked “yes,” you must populate the **Annual Full Service Rate per Square Foot** and **Available Occupancy Date** fields.


Available Space 


No 


→ If this owned facility is in scope for the [Six-Year Facilities Plan](#), you must populate the following additional fields.


→ Select the information  icon for definitions.


- Number of Offices
- Number of Cubicles
- Number of Touchdown Spaces
 - Refer to any unassigned workspace (office, cube, bench etc.) that could be used for hoteling as a touchdown space.
- Number of Resident Users
- Number of Externally Mobile Users
- Number of Fully Remote Users


Number of Offices (Required For Six-Year Plan) 

Number of Cubicles (Required For Six-Year Plan) 

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

Number of Resident Users (Required For Six-Year Plan) 



Number of Externally Mobile Users (Required For Six-Year Plan) 

Number Of Fully Remote Users (Required For Six-Year Plan) 

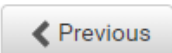

3. Select SAVE CHANGES

SAVE CHANGES Cancel Changes




→ Once the new space is saved, you can update the information by selecting the details icon or delete the space by selecting the trash can.

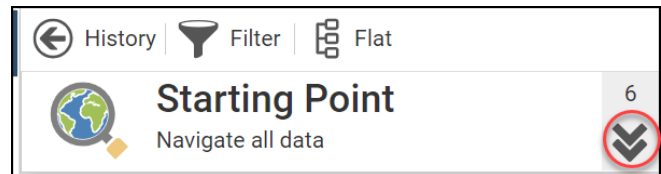
Owned Spaces			
Space Name	Space ID	Details	Delete
Test Space	001		
Add New Space			

4. Select

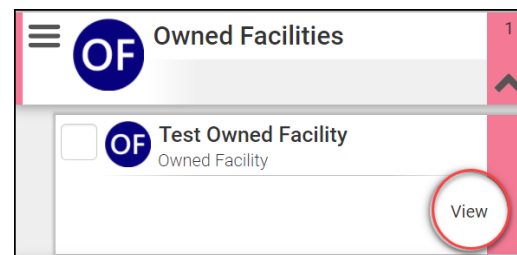
 **Next**  Cancel All Changes

Data Review

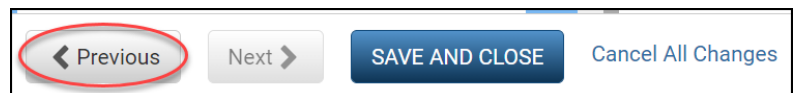
1. **Select** the  **Hierarchy** button to change to the  **Flat** view. You can now see all of the tables you have added or edited as part of the wizard process.
2. **Select** the arrows  on the Starting Point tile to expand all of the tiles below.



3. **Select** View on each tile to see the data you have entered.
4. **Review** your data.



→ To edit your data, use the Previous button to navigate back to an earlier screen.



5. **Select** SAVE AND CLOSE to complete the wizard.
6. You will see a warning that lets you know you can't go back into the wizard after saving and closing. If you don't need to make any additional edits, select YES.



→ When you complete the wizard, the window will automatically close. FPMT will still be open in the original window. You will need to refresh your screen in order to see your changes.

