This job aid provides step-by-step instructions for using FPMT's deactivation wizard to deactivate an owned, leased or receivable leased facility. These instructions do not apply to land or other assets.

FPMT has updated roles and permissions, which determine which data and functionality a user can access. Refer to the What's New with FPMT job aid for a high-level overview of system changes, including a breakdown of user role permissions.

Contents

Overview

Which FPMT user roles can deactivate a facility?	• Access to the deactivation wizard varies by role. All users must have edit rights to deactivate an owned, leased, or receivable leased facility. • Users with the Accounting role can deactivate leased and receivable leased facilities, but they cannot deactivate owned facilities. • Users with the Facilities role can deactivate owned facilities, but they cannot deactivate leased or receivable leased facilities. • Per agency discretion, an individual can be assigned both the Accounting and Facilities user roles.
Where do I access the deactivation wizard?	• The deactivation wizard is available via the menu button on the owned facility, leased facility, and receivable leased facility tiles.
What does it mean to deactivate an owned, leased, or receivable leased facility?	• Deactivation means you are removing a record from the agency's inventory report. The data remains in the system. • You should not deactivate facilities that are simply vacant or unused. You may update the space type or condition assessment score for vacant or unusable facilities to more accurately reflect their current state. • If the space is currently vacant but could be used by another agency, refer to the Available Space job aid for instructions on how to "advertise" this space.
When should I deactivate an owned, leased, or receivable leased facility?	• An owned facility should be deactivated when it is no longer obligated to the state because it has been sold or demolished. o Owned facilities that are vacant and unused should not be deactivated, even if they will eventually be demolished. Facilities should not be deactivated until they have actually been sold or demolished. • A leased facility should be deactivated when it has been vacated due to relocation or building closure. The data will remain in the system but will no longer be included in reports. • A receivable leased facility should be deactivated when it has been vacated by the tenant agency.
Will the wizard always deactivate all associated records?	• The wizard will not deactivate the facility table if there is more than one active leased facility associated with that record. • The wizard will not deactivate the lease contract table if there is an active receivable leased facility associated with that record.

What information do I need to deactivate an owned, leased, or receivable leased facility?	• While you do not need any specific information to use the deactivation wizard, the UFI is an easy way to search for and locate an owned or leased facility, and the receivable lease number is an easy way to search for a receivable leased facility.
	• If agency operations are relocating from a leased facility to a different facility, you will need:
	    o Relocation UFI
	    o Relocation Lease Contract Number (N/A if not applicable)

Why should I use the wizard?	• The wizard simplifies the deactivation process by reducing manual activity in the system and automatically deactivating associated tables.

Wizard basics:
- The wizard opens in a new window, which will close when you complete the process. Once the deactivation wizard 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, you will lose your data.

Deactivate an Owned Facility

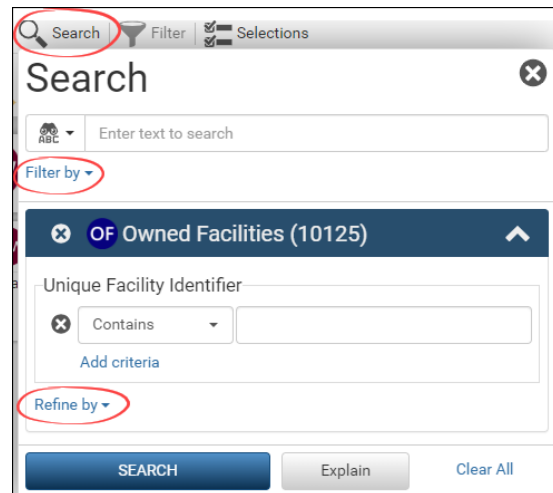Navigate to the owned facility tile and launch the deactivation wizard.
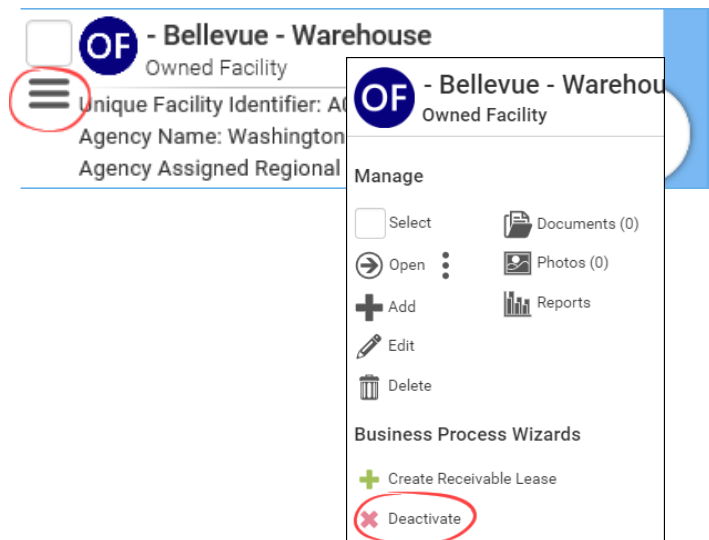
1. **Open** the Data Explorer module.

Data Explorer
Begin here to search, analyze, and drill down into your data
Open
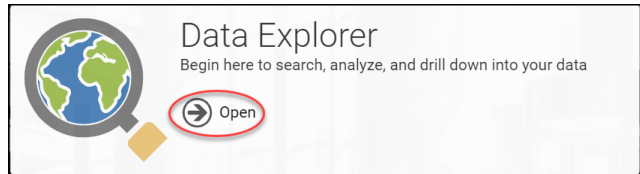
2. **Select** the 🔍 Search button on the data explorer tool bar.
3. **Select** Filter by ▾ and choose **Owned Facilities**.
4. **Select** Refine by ▾ and choose **Unique Facility Identifier**.
5. **Enter** the UFI.
   ➜ If you need to locate a UFI, run the Owned Facilities Inventory Report available via the menu button on your agency tile.
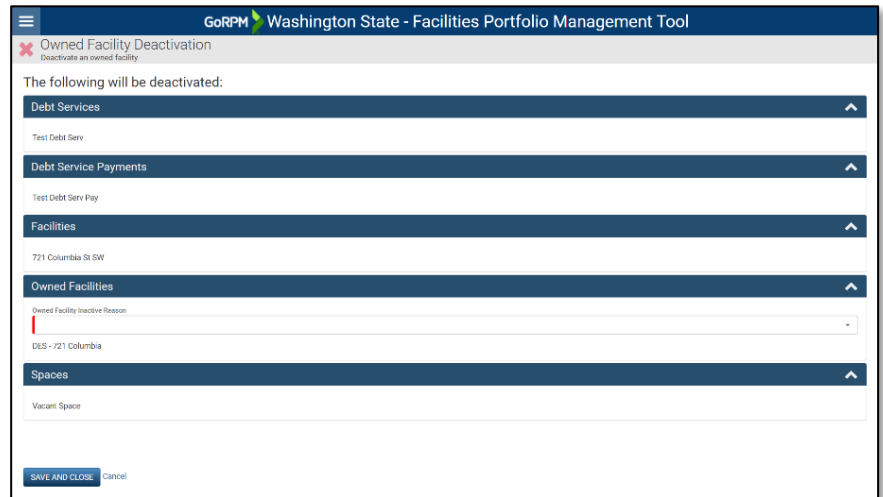6. **Select** SEARCH

Search | Filter | Selections
Search
Enter text to search
Filter by ▾
❌ OF Owned Facilities (10125) ⌃
Unique Facility Identifier
❌ Contains ▾
Add criteria
Refine by ▾
SEARCH | Explain | Clear All

7. **Select** the ☰ menu button on the owned facility tile.
8. **Select** ❌ Deactivate

OF - Bellevue - Warehouse
Owned Facility
☰ Unique Facility Identifier: A
Agency Name: Washington
Agency Assigned Regional

OF - Bellevue - Warehou
Owned Facility
Manage
☐ Select   🖺 Documents (0)
→ Open ⋮   🖼 Photos (0)
➕ Add   📊 Reports
✏ Edit
🗑 Delete
Business Process Wizards
➕ Create Receivable Lease
❌ Deactivate

9. **Select** the Owned Facility Inactive Reason.

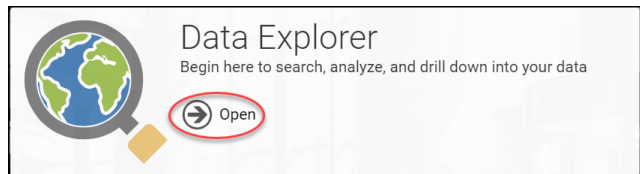   ➔ This is a dropdown field.

10. **Select** SAVE AND CLOSE

Deactivate a Leased Facility

Navigate to the leased facility tile and launch the deactivation wizard.

1. **Open** the Data Explorer module.

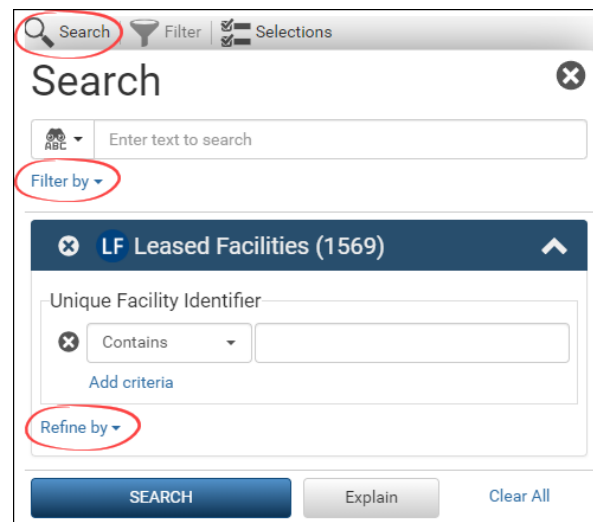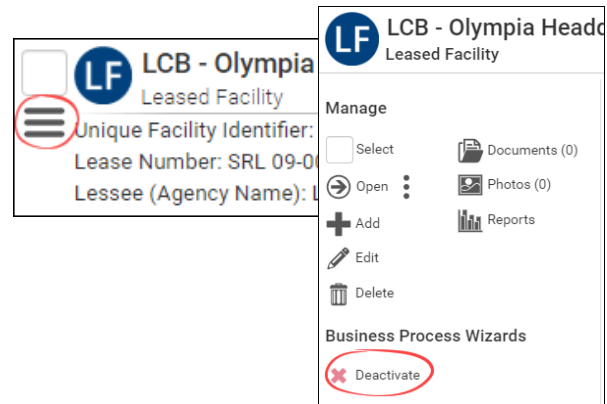2. **Select** the 🔍 Search button on the data explorer tool bar.

3. **Select** Filter by ▾ and choose **Leased Facilities**.

4. **Select** Refine by ▾ and choose **Unique Facility Identifier**.

5. **Enter** the UFI.

   ➔ If you need to locate a UFI, run the Lease Contract Inventory Report available via the menu button on your agency tile.

6. **Select** SEARCH

7. **Select** the ☰ menu button on the leased facility tile.

8. **Select** ✖ Deactivate

9. **Select** the Lease Contract Inactive Reason

   ➔ This is a dropdown field.

   ➔ If you choose the inactive reason "Closed – Staff Relocated," two additional fields become required.

   - Relocation UFI

     ➔ If operations are being relocated to an existing facility in the inventory, enter the UFI.

     ➔ If staff are moving to a new location that is not in the inventory, create a new facility to generate a UFI *prior to* deactivating the record.

   - Relocation Lease Contract Number

     ➔ If staff are moving to a leased or subleased location, enter the contract number.

     ➔ If staff are consolidating into an owned facility that is owned by your agency, enter N/A.

10. **Select** the Leased Facility Inactive Reason

    ➔ This is a dropdown field.

11. **Select** SAVE AND CLOSE

➜If the facility has more than one active leased facility associated with it (e.g., one than one tenant), you will not be able to deactivate the facility record as part of the wizard process. You will receive this message.

➜If the facility should be deactivated, you would first need to deactivate the leased facilities separately. Once there is only one active leased facility associated with the facility record, FPMT will automatically deactivate the facility as part of the wizard process.

Warning

The facility New Facility/Create LF Wizard - OFM Testing could not be deactivated because there are active leased facilities associated with it.
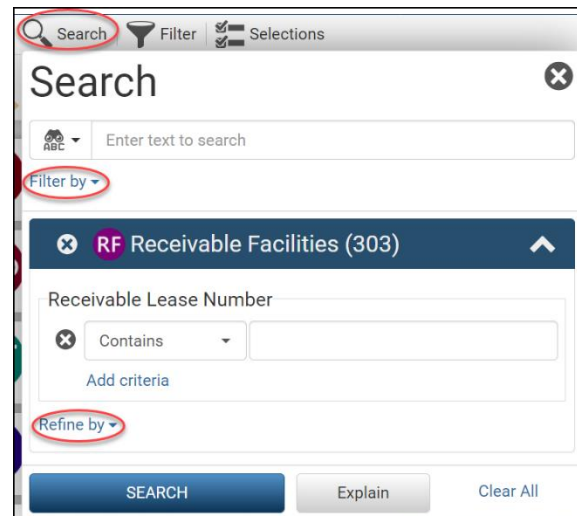
OK
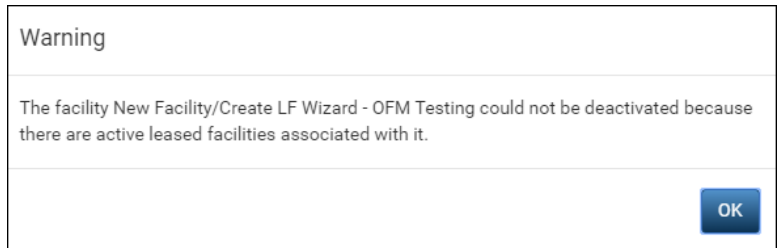
Deactivate a Receivable Leased Facility

Navigate to the receivable leased facility tile and launch the deactivation wizard.

1. **Open** the Data Explorer module.

Data Explorer
Begin here to search, analyze, and drill down into your data
Open
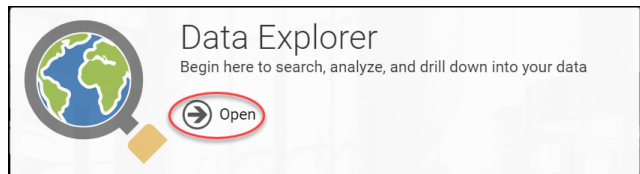
2. **Select** the 🔍 Search button on the data explorer tool bar.

3. **Select** Filter by ▾ and choose **Receivable Facilities**.

4. **Select** Refine by ▾ and choose **Receivable Lease Number**.

5. **Enter** the receivable lease number.

➜If you need to locate a receivable lease number, run the Receivable Lease Contract Inventory Report available via the menu button on your agency tile.

6. **Select** SEARCH

🔍 Search ▼ Filter | Selections

Search ⊗

ABC ▼ | Enter text to search

Filter by ▾

⊗ RF Receivable Facilities (303) ⌃

Receivable Lease Number

⊗ Contains ▼ |

Add criteria

Refine by ▾

SEARCH | Explain | Clear All

7. **Select** the ☰ menu button on the receivable facility tile.

8. **Select** ✖ Deactivate
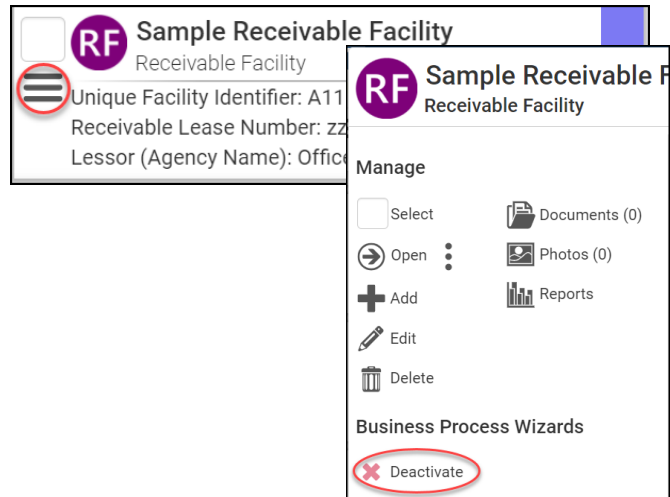
9. **Select** the Receivable Contract Inactive Reason

   ➜ This is a dropdown field.

10. **Select** the Receivable Facility Inactive Reason

   ➜ This is a dropdown field.

11. **Select** SAVE AND CLOSE