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

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Overview

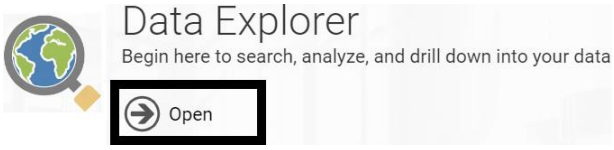
The owned facility review wizard allows users to view and update all tables associated with existing owned facilities. FPMT will guide you through a sequence of steps to review/edit data.

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. You can also upload documents and photos as you move through the wizard.
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.



2. **Select:** Search.



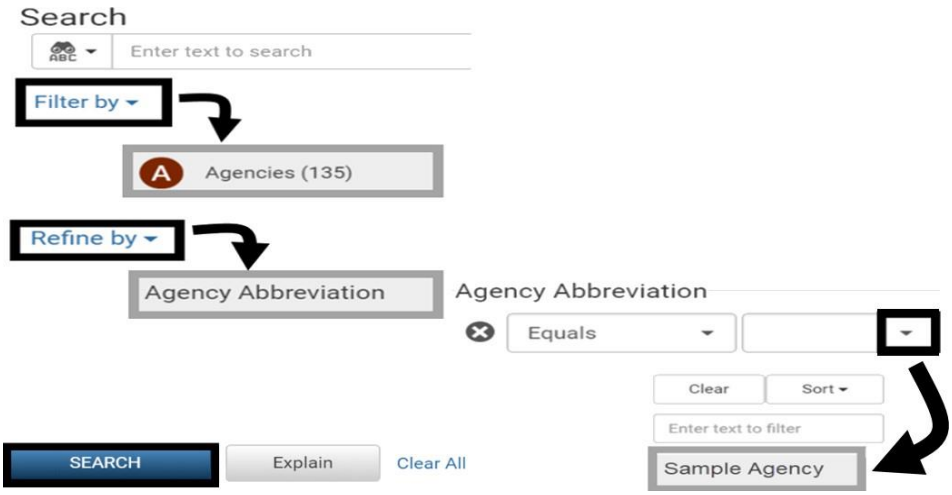
3. **Select:** Filter by.

➔ 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.



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



Edit Owned Facilities

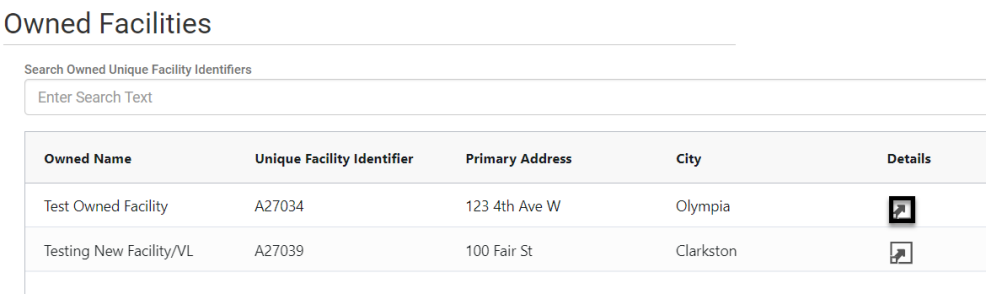
FPMT will display a list of active owned facilities for the agency.

✓ 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.



2. Review/Edit: Owned facility details.

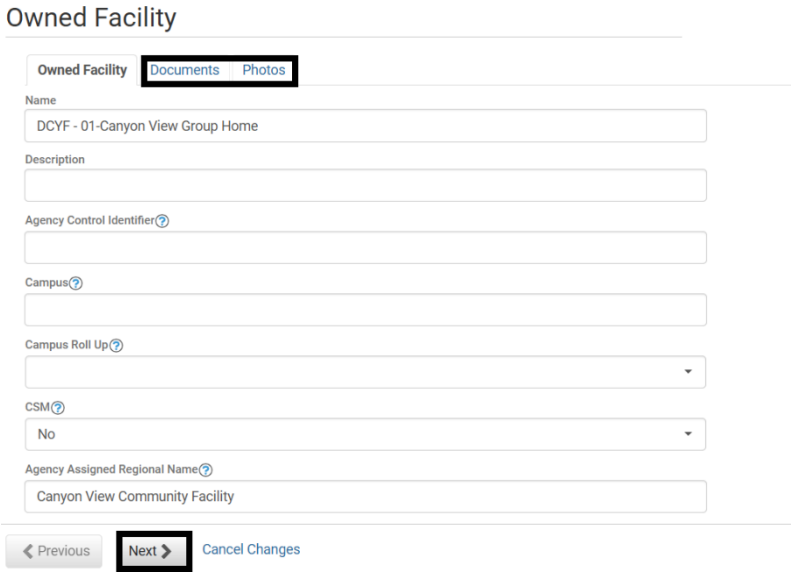
➔ Use the scroll bar to review/edit additional data.

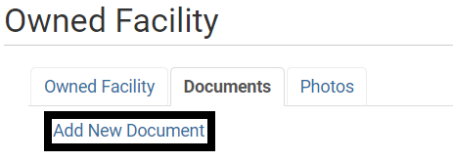
➔ You can also upload files by:

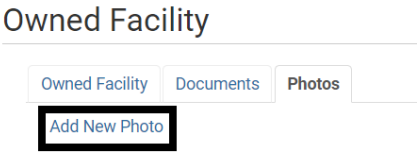
- Selecting Documents or Photos.
- Selecting Add New Document or Add New Photo.
- Browse for, or drag and drop, your file(s).
- Select CLOSE.

3. Select: Next.

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









Edit Facility

FPMT will display the facility associated with the owned facility.

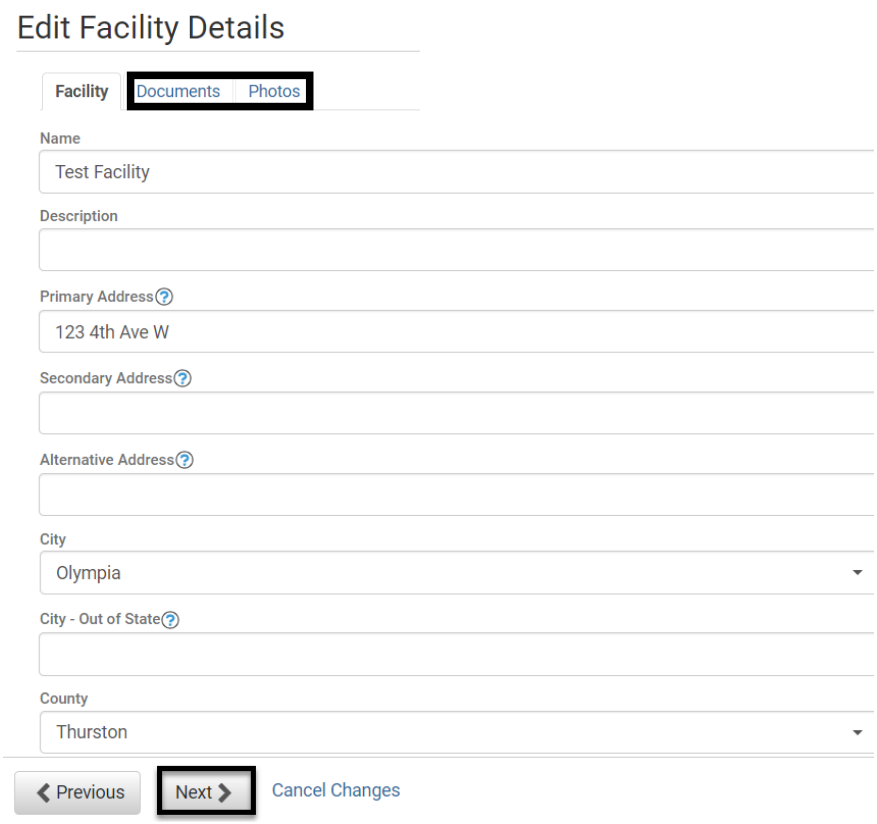
1. **Review/Edit:** Facility details.

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

➔ You can also upload files by selecting Documents or Photos.

2. **Select:** Next.

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



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.



2. **Review/Edit:** Condition matrix details.

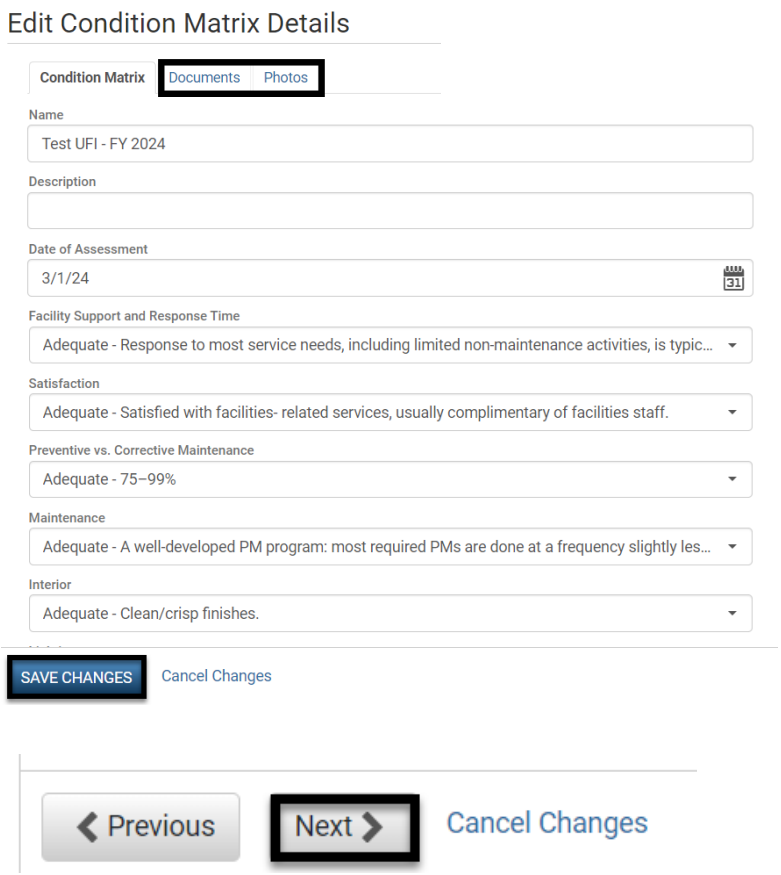
➔ Use the scroll bar to review/edit additional data.

➔ You can also upload files by selecting Documents or Photos.

3. **Select:** Save changes.

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

4. **Select:** Next



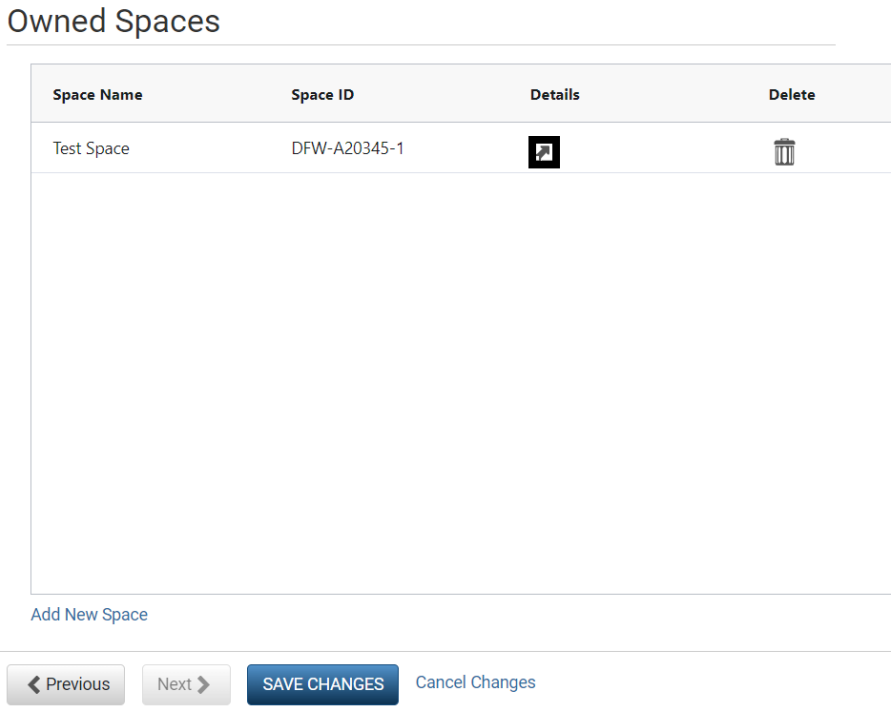
Edit Owned Spaces

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.



2. Review/Edit: Space details.

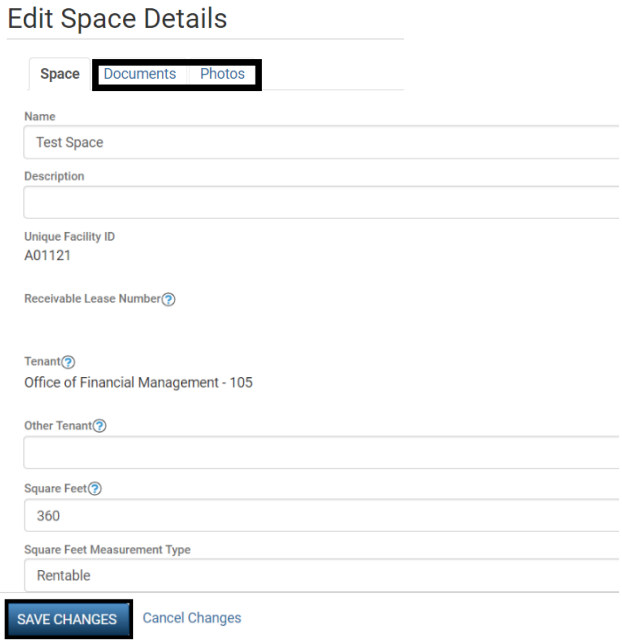
➔ Use the scroll bar to review/edit additional data.

➔ You can also upload files by selecting Documents or Photos.

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.



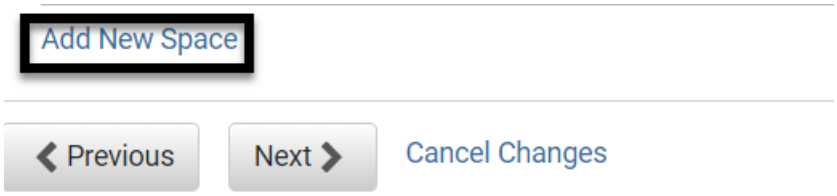
Add New Space

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.

➔ Tenant Agency SAAM Acronym – Agency Assigned Common Name (e.g., OFM – Storage Unit)

➔ Description is optional.



3. Input: Square Feet

4. Input: Square Feet Measurement type.

5. Input: Primary Space Type.



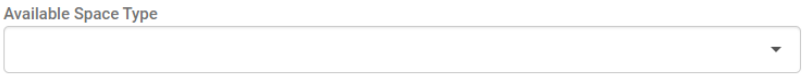
➔ Secondary Space Type is optional.
➔ Additional Space Type is optional.



6. 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.



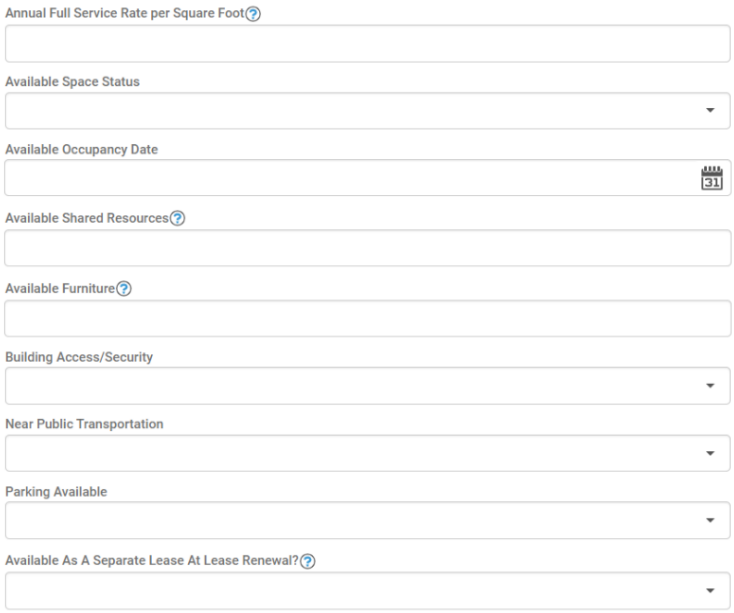
➔ Available Space Type is optional.



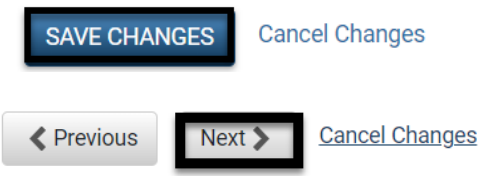
7. Input: Workstation counts.
➔ This data is required for facilities that are in scope for the Six-Year Facilities Plan.
➔ Select ? for definitions.



➔ 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.



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



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.

