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

When you create a new facility in FPMT, it will be saved in Pending status. OFM will review the record and contact you if corrections or additional information is needed. Once OFM approves the new facility, it will appear in your agency's inventory reports.

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Overview

Where do I access the owned facility creation wizard?	• The Create Owned Facility wizard is accessed via the menu button on the agency tile.
When should I enter a new owned facility?	• New owned facilities should be entered into FPMT within 30 days of 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?	• Notify OFM if this scenario applies. • Your Facilities Analyst will create a new owned facility using the existing UFI.
What information do I need to create a new owned facility?	• A copy of the deed • A floor plan that shows the total square footage • Parcel Number • Legislative District • Workstation counts (office space only)
How do I get the new unique facility identifier (UFI) into HRMS?	• 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?	• Users can no longer manually edit data in FPMT and must use the wizard to create owned facilities. • 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.

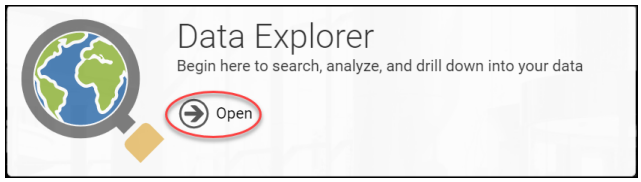
Wizard basics:

- 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, you will lose your data.
- You navigate through the wizard by clicking the Next or Previous buttons.

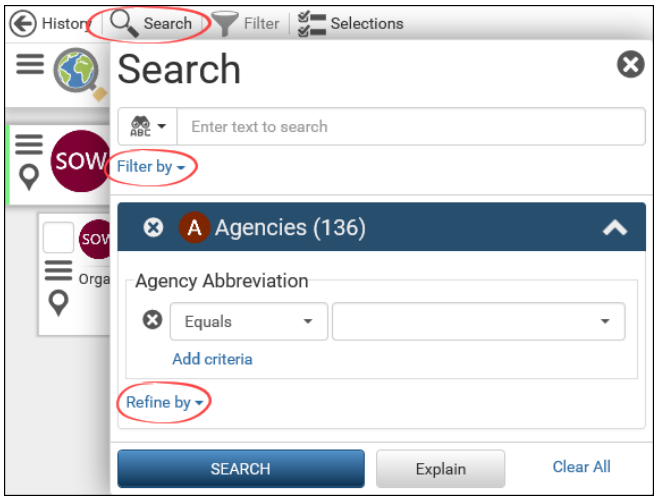
Launch the Owned Facility Creation Wizard

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

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

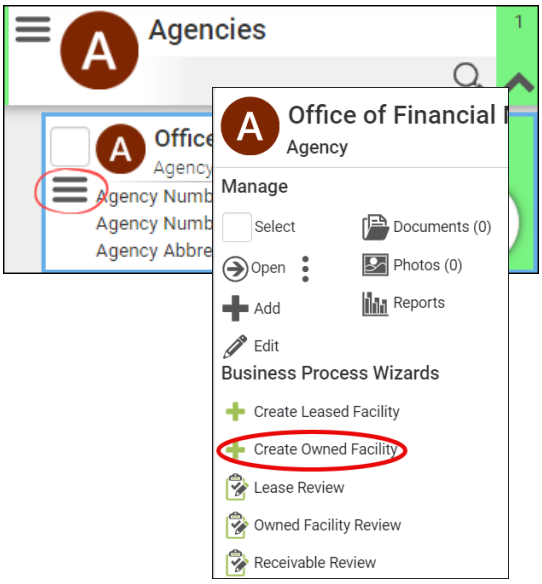


2. **Select** the Search button on the data explorer tool bar.
3. **Select** Filter by and choose **Agencies**.
4. **Select** Refine by and choose **Agency Abbreviation**.
5. **Enter** the abbreviation.
   ➔These are SAAM acronyms.
6. **Select** SEARCH



7. **Select** the menu button on the agency tile.
8. **Select** Create Owned Facility

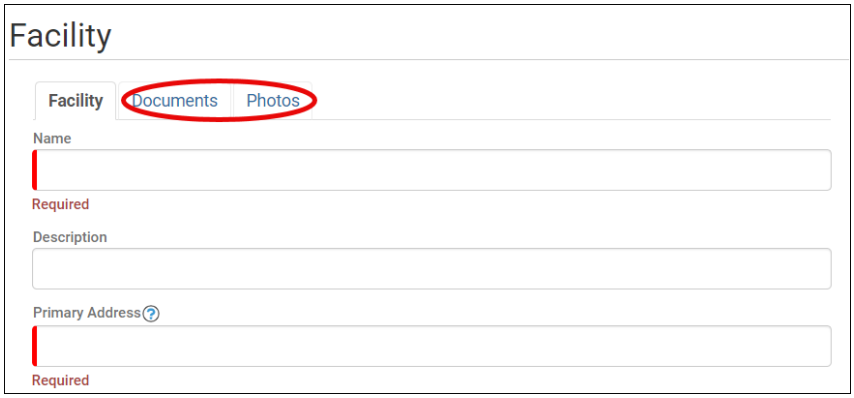
➔You will have the opportunity to add documents and photos to each table as you move through the wizard.

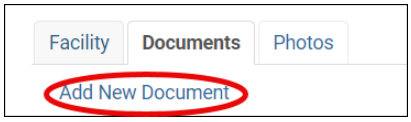


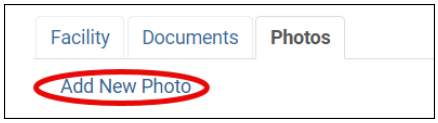
Add a New Facility

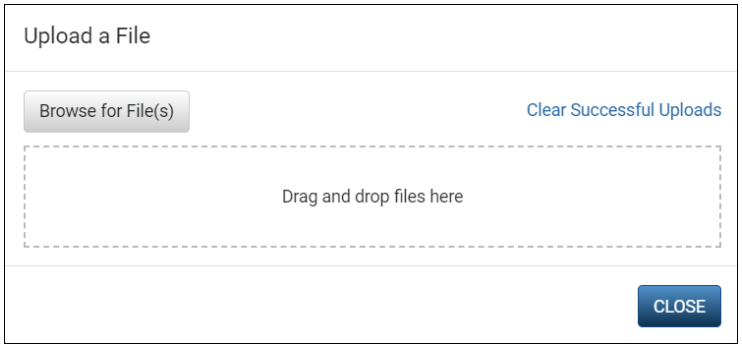
➔You can upload documents and photos to the Facility table here.

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









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.

     ➔Abbreviate the directional and street suffix per USPS Addressing Standards. (e.g., 123 S Main St)

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

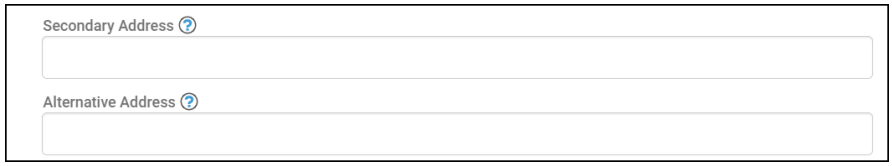
     ➔The system will only catch duplicate addresses if they are entered exactly the same. If you are entering multiple facilities with the same primary address, make sure to use the same formatting.

     (e.g., Jefferson St)

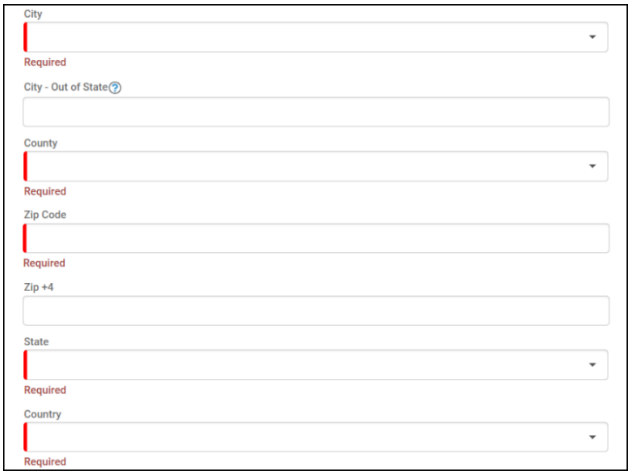
   - Secondary Address

     ➔A secondary designator, such as a building number or name.
   - Alternative Address

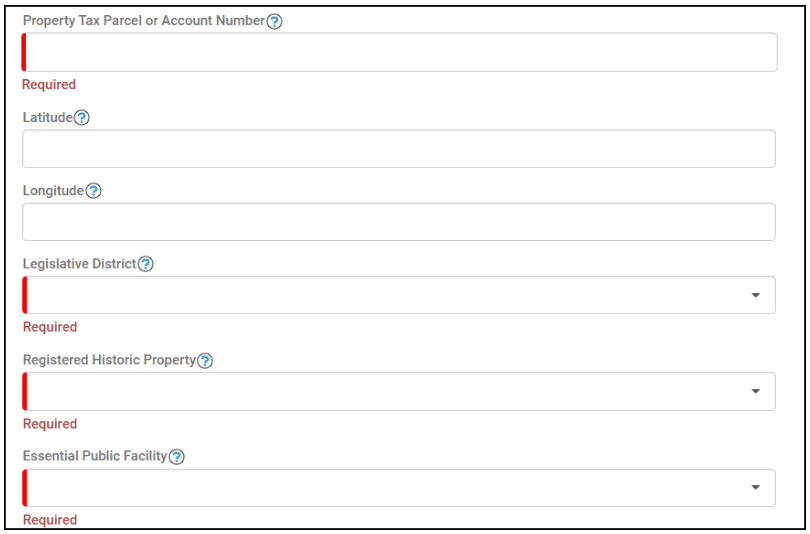
     ➔ Only populate this field if the facility has an address other than the legal address, for example a different mailing address.



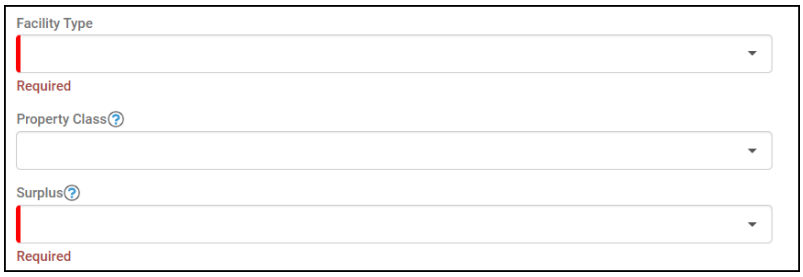
- City – Out of State
  ➔ If the facility is located outside of Washington State, select Out of State at the bottom of the dropdown list on the City, County and Legislative District fields. Enter the city in the City – Out of State field.

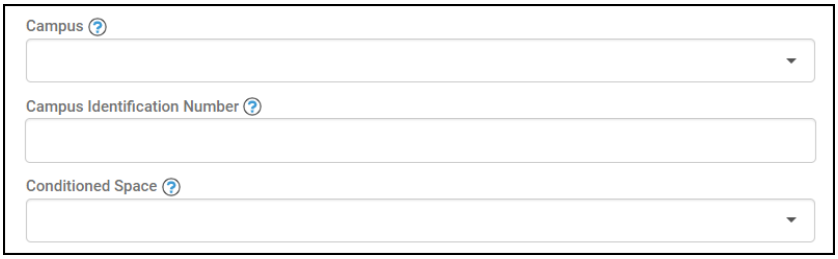


- Property Tax Parcel or Account Number
  ➔This information can be found on the county assessor's website.
  ➔If there is no parcel number for this facility or it is located out of state, enter N/A.
- Latitude & Longitude (required)
  ➔FPMT will automatically populate this data after you geocode the 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.

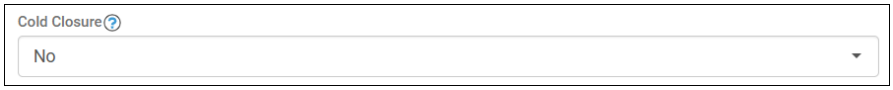


- Facility Type (Building/Structure)
  ➔A building is a facility with at least one wall, a roof and permanent foundation, regardless of occupancy. **Only buildings are included in the facilities inventory.**
  ➔A stucture is a real property improvement constructed on or in the land, which is not a building.
- 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 surplused.
- 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.





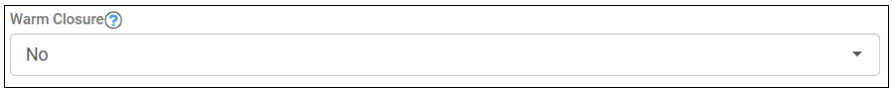
- Cold Closure
  ➔Defaults to “no.” Select “yes” if applicable.
  ➔Cold closure refers to an unoccupied facility with systems shut down to minimize costs, requiring greater effort to restore for future use.



- Warm Closure

  ➔Defaults to “no.” Select “yes” if applicable.

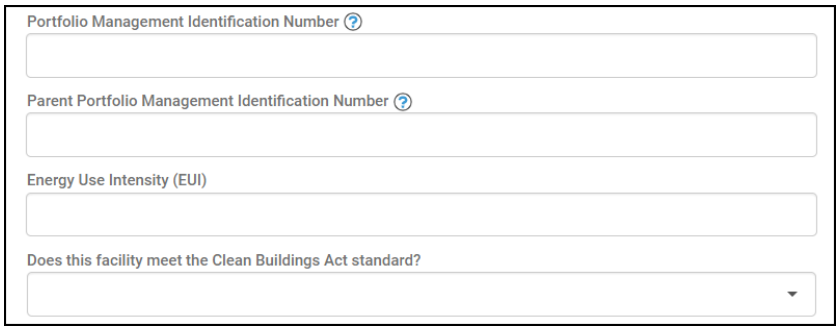
  ➔Warm closure refers to an unoccupied facility maintained in an operational state to preserve condition and enable quick reactivation.



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

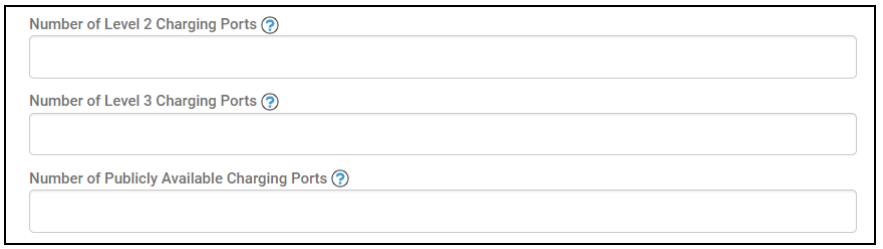
- Portfolio Management Identification Number
- Parent Portfolio Management Identification Number
- Energy Use Intensity (EUI)
- Does this facility meet the Clean Buildings Act standard? (Yes/No)

  ❖ Refer to the Department of Commerce’s website for more information on Clean Buildings Act compliance criteria.



➔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



- Facilities Inventory

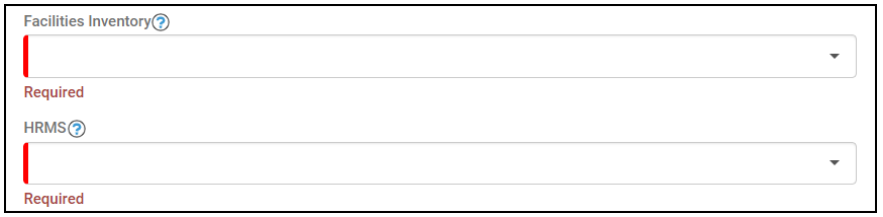
  ➔ Select “yes” if the facility is a building with at least one wall, a roof and a permanent foundation, regardless of occupancy.

- HRMS

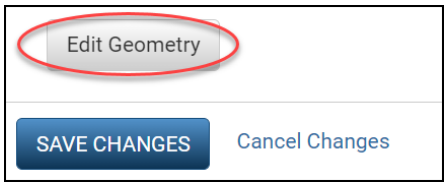
  ➔ Select “yes” if the facility serves as a duty station for employees.

- 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.

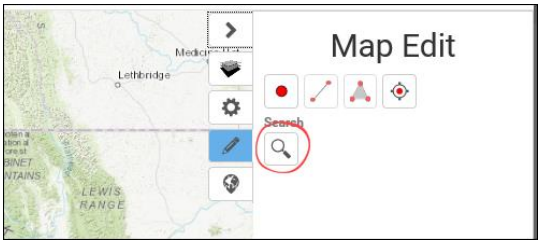


2. **Select** Edit Geometry to geocode your facility (place a point on the map).
   ➔You must geocode the facility or manually populate the coordinates.
   ➔You will receive an error if you skip this step.

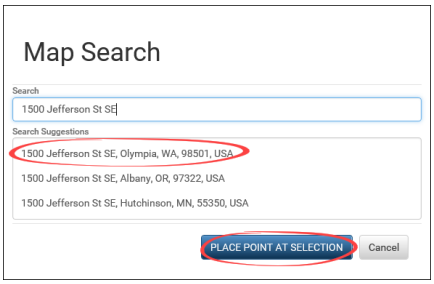




3. **Select** the search button.



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

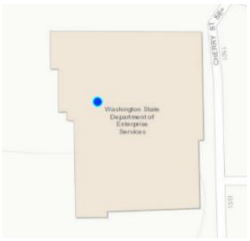


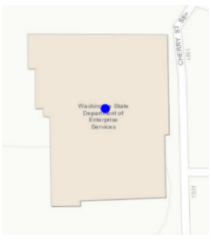
7. **Select** the + button to zoom in on the map.
   ➔A blue dot will appear at the specified address.

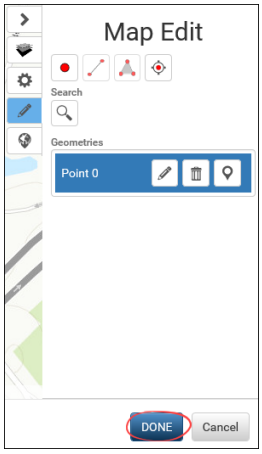




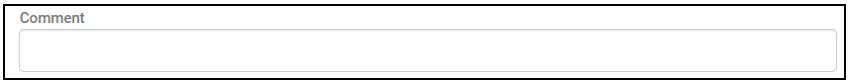
8. If the point is in a road, you will need to move it so it is on the actual facility.
   A. **Select** the dot – it will become highlighted.
   B. **Move** the dot to the approximate center of the building.
   C. **Click/tap** anywhere on the map when you're finished. The dot will no longer be highlighted.
9. **Select** Done.
   ➔Once you save your changes, the dot will be black if you go back into the map editor.







➔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.



10. Select Next ❯



Add a New Owned Facility

1. Enter agency data. Red fields are required.

- Name

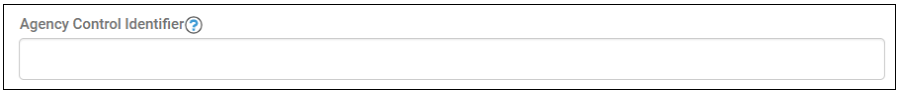
  ➔Agency SAAM acronym – agency common name

  (e.g., DSHS – Auditorium



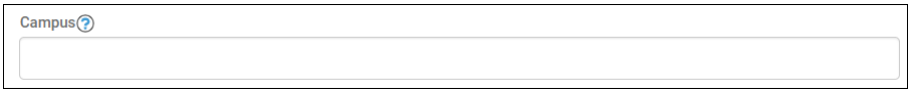
- Agency Control Identifier

  ➔Optional field that can be used to assign internal agency building identifiers or to group facilities by region, program, etc.



- Campus

  ➔If this facility is associated with a campus, enter the campus name. A campus is a multi-facility location, such as a prison, hospital, park, hatchery, etc.



- Campus Roll Up

  ➔This field becomes required if you populate the Campus field.

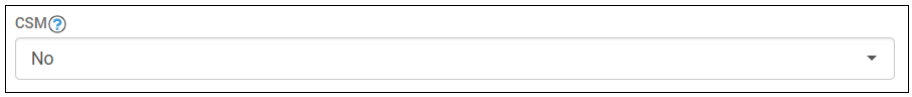
  ➔Select “yes” if you want FPMT to roll up the campus in the Facility Cost Template report. Otherwise, select “no.”

  ➔Although cost data is not required for owned facilities at this time, in the future this functionality would allow you to report costs for the campus as a single line item instead of by building.



- CSM

  ➔Do not populate. This field captures whether the facility is part of the Central Service Model. It defaults to “no” and is populated by OFM.

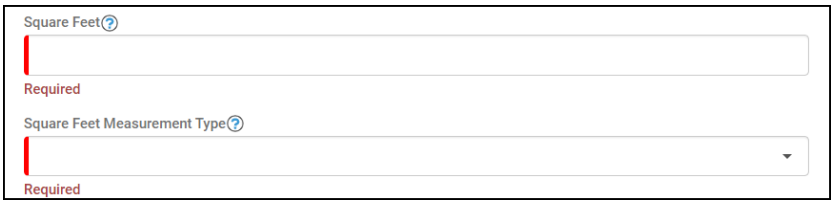


- Square Feet

  ➔Enter a whole number. If needed, round to the nearest square foot.

- Square Feet Measurement Type (dropdown)

  ➔Choose Gross.



- Condition Assessment Score

  ➔This field is required for all facilities in the inventory.

  ➔1=Superior, 2=Adequate, 3=Fair, 4=Limited, 5=Emergent Services Only

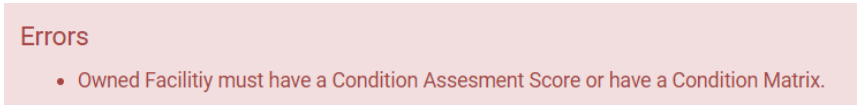
  ➔If your agency uses its own condition assessment scale, you may use a crosswalk from your scores to the FPMT values.

  ➔OFM requires a score 1-5 rather than NA. If your facility has not been assessed but is in usable condition, you may choose 2 (Adequate).

  ➔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” for all buildings (not structures) unless the facility is associated with one of the following agencies:

  a. Four-year and two-year higher education institutions
  b. Historical societies
  c. School for the Blind
  d. Center for Deaf and Hard of Hearing Youth.



2. **Navigate** to the the next needed form.

   - To add a condition matrix, select Next ❯

   - If you do not need to add a condition matrix, select Next ❯ twice to reach the Owned Spaces section.



Condition Matrix

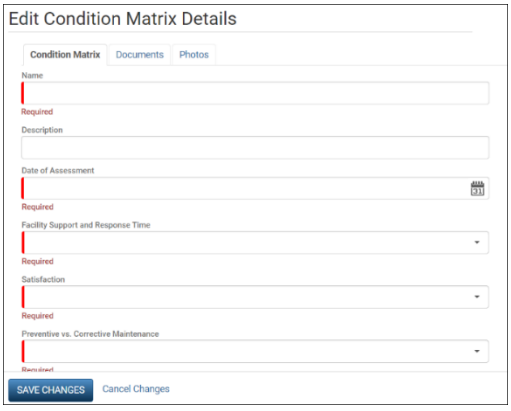
1. **Select** Add New Condition Matrix



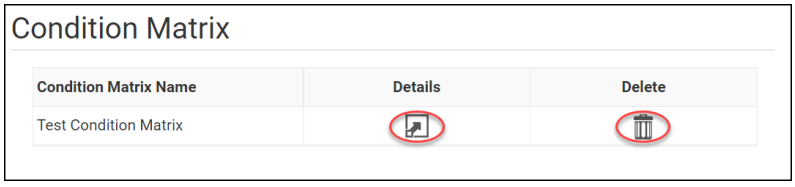
2. **Enter** data. Red fields are required.

   ➔Refer to the Condition Matrix job aid for more information.

3. **Select** SAVE CHANGES



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

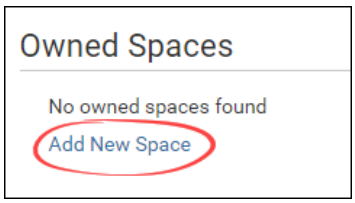


4. Select Next >



Add a New Space

1. Select Add New Space



2. Enter agency data. Red fields are required.

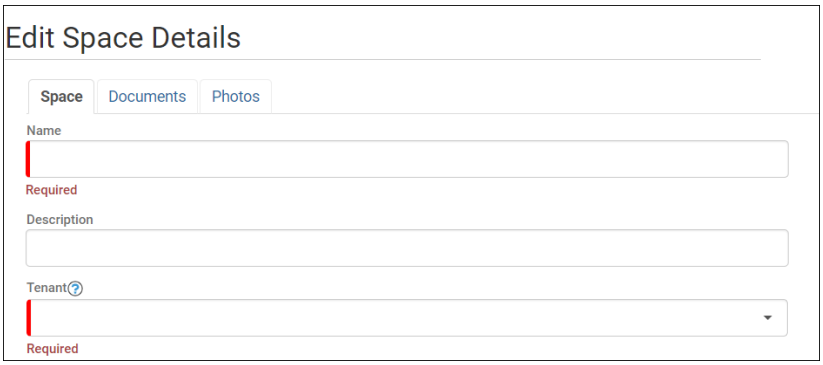
➔Select the information icon for additional guidance.

- Name

  ➔ Tenant agency SAAM acronym – agency assigned common name

  (e.g., DSHS – Auditorium)

- Tenant

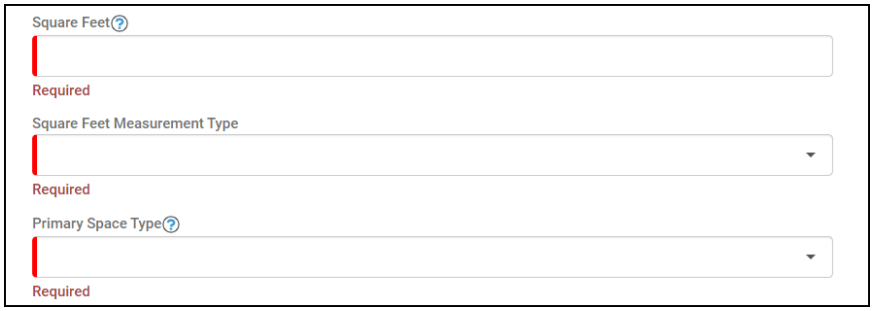


- Square Feet

  ➔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.



- 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.



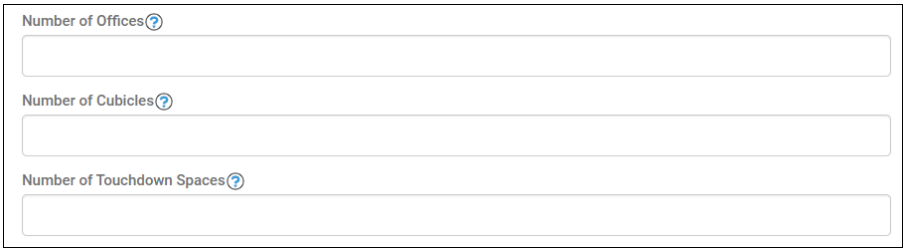
➔If this owned facility is in scope for the Six-Year Facilities Plan, you must populate the following additional fields.

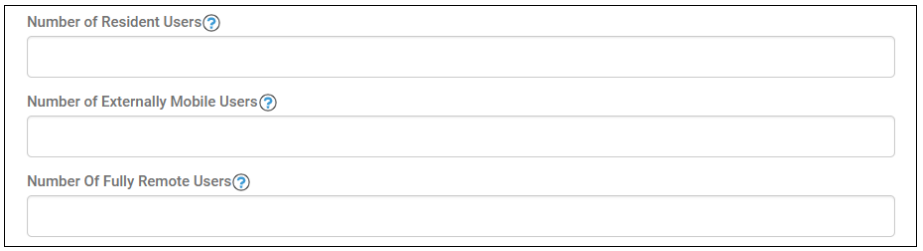
➔Select the information icon for definitions.

- 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, but do not double count by also including it in the office or cubicle counts.

➔OFM will populate user count fields from HRMS data via import.

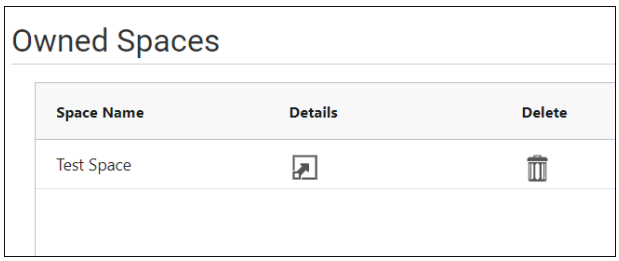




3. Select SAVE CHANGES



➔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.



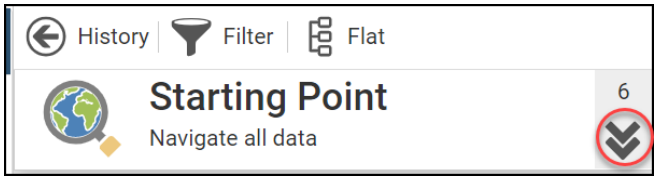
4. Select Next to review your data.



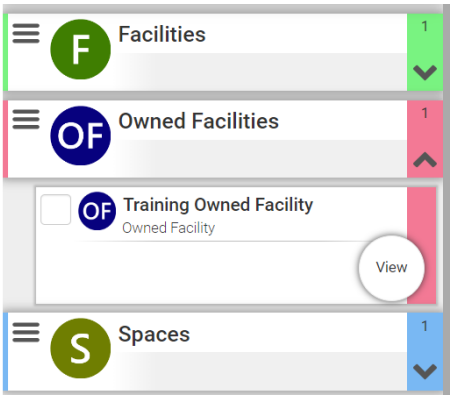
Data Review

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.

