



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

As of April 2024, FPMT's accounting functionality and integration with the Agency Financial Reporting System (AFRS) have been removed. There is now only one agency editor role, which has access to all wizards.

Contents

Overview	2
Launch the Owned Facility Creation Wizard	3
Add a New Facility	4
Add a New Owned Facility.....	9
Condition Matrix.....	10
Add a New Space.....	11
Data Review	12

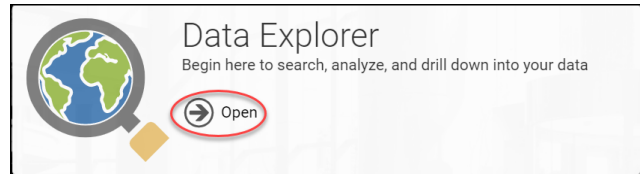
Overview



<p>Where do I access the owned facility creation wizard?</p>	<ul style="list-style-type: none"> • The Create Owned Facility wizard is accessed via the menu button on the agency tile.
<p>When should I enter a new owned facility?</p>	<ul style="list-style-type: none"> • New owned facilities should be entered into FPMT within 30 days of the occupancy date.
<p>What should I do if I need to create a new facility in the same location as a previous building that was demolished?</p>	<ul style="list-style-type: none"> • Notify OFM if this scenario applies. • Your Facilities Analyst will create a new owned facility using the existing UFI.
<p>What information do I need to create a new owned facility?</p>	<ul style="list-style-type: none"> • A copy of the deed • A floor plan that shows the total square footage • Parcel Number • Legislative District
<p>How do I get the new unique facility identifier (UFI) into HRMS?</p>	<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.
<p>Why should I use the wizard?</p>	<ul style="list-style-type: none"> • 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.
<p>Wizard basics:</p> <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. 	

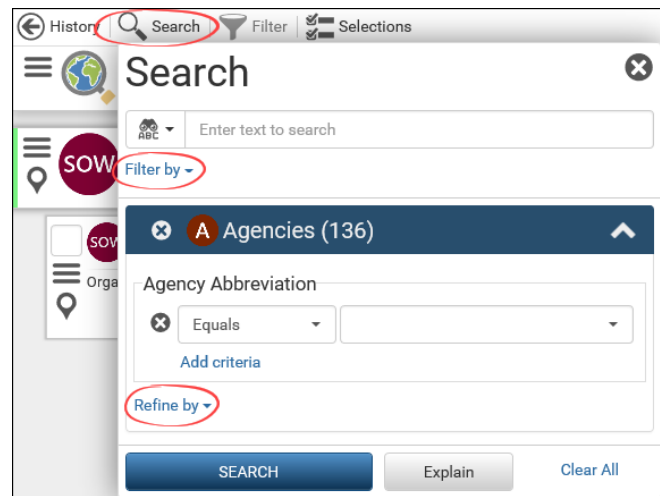
Launch the Owned Facility Creation Wizard

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

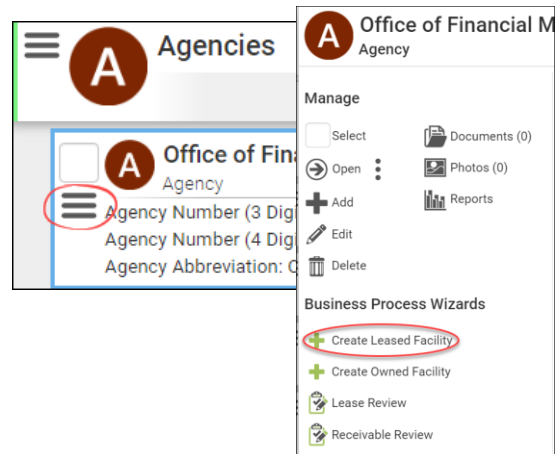
1. Open the Data Explorer module.



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.
 - 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.

Edit Facility Details


Name


Required

Description

Primary Address 

Required

Secondary Address 

Alternative Address 

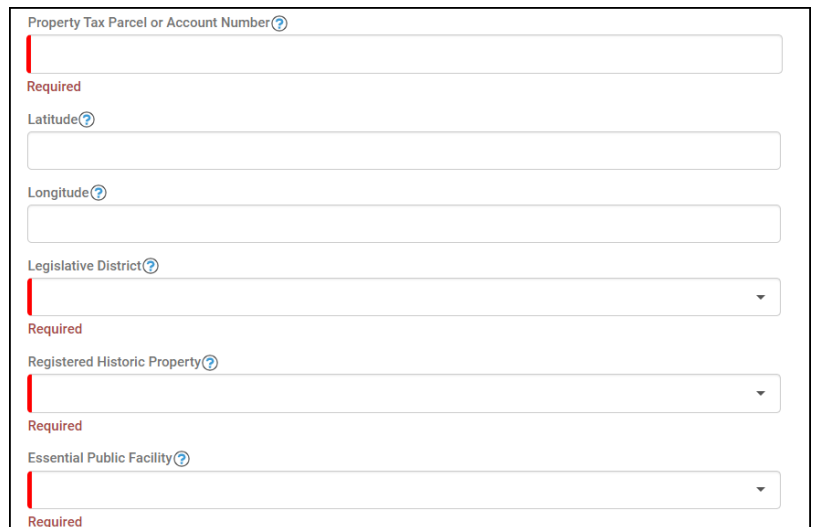
- City – Out of State
 - If the facility is located outside of Washington State, select Out of State at the bottom of the dropdown list on the City, County and Legislative District fields. Enter the city in the City – Out of State field.



This screenshot shows a portion of the form with the following fields:

- City**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- City - Out of State**: A text input field with a question mark icon on the right.
- County**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- Zip Code**: A text input field with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- Zip +4**: A text input field with a red vertical bar on the left and a question mark icon on the right.
- State**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- Country**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".

- 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](#).



This screenshot shows a portion of the form with the following fields:

- Property Tax Parcel or Account Number**: A text input field with a question mark icon on the right. Below it is the text "Required".
- Latitude**: A text input field with a question mark icon on the right.
- Longitude**: A text input field with a question mark icon on the right.
- Legislative District**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- Registered Historic Property**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".
- Essential Public Facility**: A dropdown menu with a red vertical bar on the left and a question mark icon on the right. Below it is the text "Required".

- 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.
- 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.

Facility Type

Required

Property Class

Surplus

Required

Campus

Campus Identification Number

Conditioned Space

→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 (?)

Parent Portfolio Management Identification Number (?)

Energy Use Intensity (EUI)

Does this facility meet the Clean Buildings Act standard?

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.

Facilities Inventory(?)

Required

HRMS(?)

Required

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.

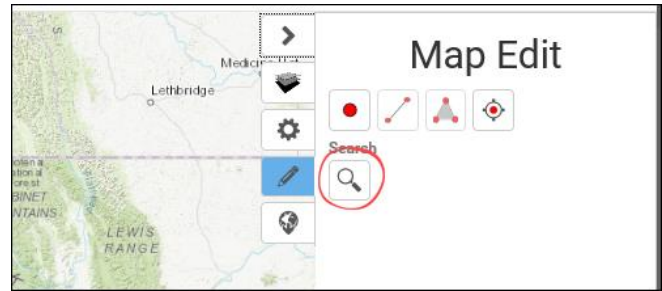
Edit Geometry

SAVE CHANGES Cancel Changes

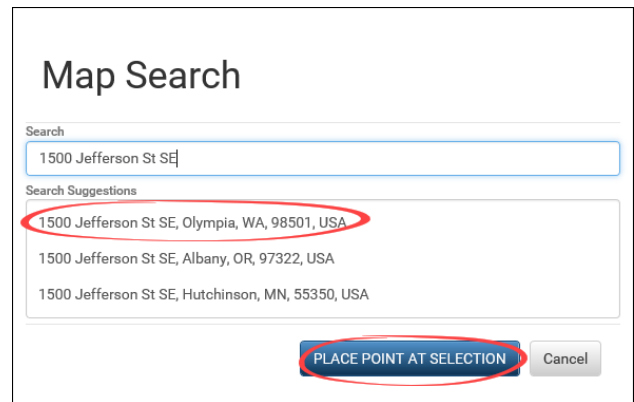
Errors


- Facility must have Latitude and Longitude or be geocoded.

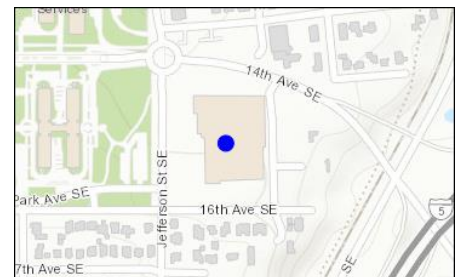
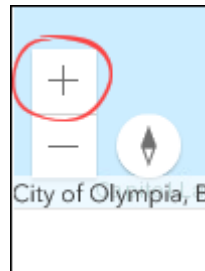
3. Select the search  button.



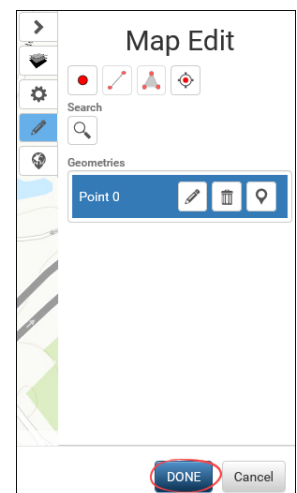
- 4. Enter the street address – the system will populate addresses in the dropdown menu.
- 5. Select the appropriate address.
- 6. Select Place Point at Selection



- 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.
 - A. Select the dot – it will become light blue.
 - B. Move the dot to the approximate center of the building.
 - C. 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.

Comment

10. Select

Add a New Owned Facility

1. Enter agency data. Red fields are required.

- Name
 - Agency SAAM acronym – agency common name (e.g., DSHS – Auditorium)
- Square Feet
- Square Feet Measurement Type (dropdown)
- 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.”

Owned Facility

Name

Required

Square Feet [?]

Required

Square Feet Measurement Type [?]

Required

Condition Assessment Score [?]



Errors

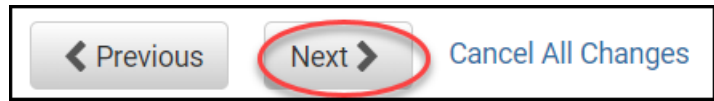
- Owned Facility must have a Condition Assessment Score or have a Condition Matrix.

Six-Year Facilities Plan [?]

Required

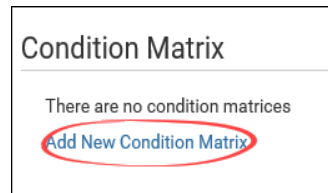
2. Navigate to the the next needed form.

- The operating costs table is no longer required. OFM will apply a proxy instead.
- To add a condition matrix, select 
- If you do not need to add a condition matrix, select  three times to reach the [Owned Spaces](#) section.



Condition Matrix

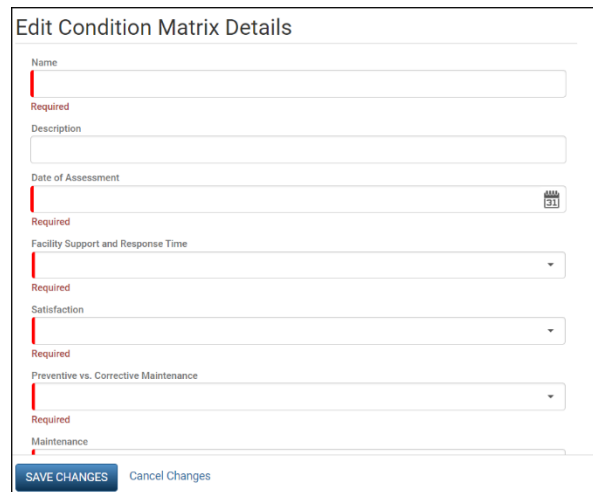
1. Select Add New Condition Matrix





2. Enter data. Red fields are required.

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


3. Select SAVE CHANGES

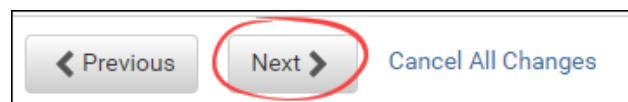


→ Once the condition matrix is saved, you can update the information by selecting the details icon or delete it by selecting the trash can.

Condition Matrix Name	Details	Delete
Test Condition Matrix		

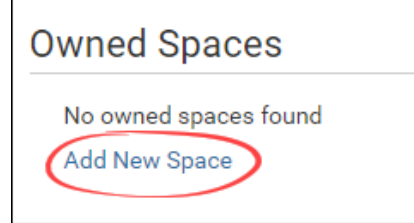
4. Navigate to the next needed form.

- Select  twice to reach the [Owned Spaces](#) section.




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
 - Use the Space ID
- Space ID
 - SAAM Acronym-UF1-Space Number (e.g., DSHS-A27122-1)
- Tenant

Edit Space Details


Name Required

Description


Space ID  Required

Tenant  Required

- 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  Required


Square Feet Measurement Type Required

Primary Space Type  Required

- 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.

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

Number of Offices (Required For Six-Year Plan) 
<input type="text"/>
Number of Cubicles (Required For Six-Year Plan) 
<input type="text"/>
Number of Touchdown Spaces (Required For Six-Year Plan) 
<input type="text"/>



Number of Resident Users (Required For Six-Year Plan) 
<input type="text"/>
Number of Externally Mobile Users (Required For Six-Year Plan) 
<input type="text"/>
Number Of Fully Remote Users (Required For Six-Year Plan) 
<input type="text"/>

3. Select SAVE CHANGES



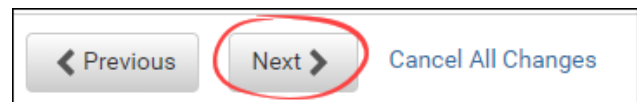
→ Once the new space is saved, you can update the information by selecting the details icon or delete the space by selecting the trash can.

Owned Spaces



Space Name	Space ID	Details	Delete
Test Space	001		


[Add New Space](#)

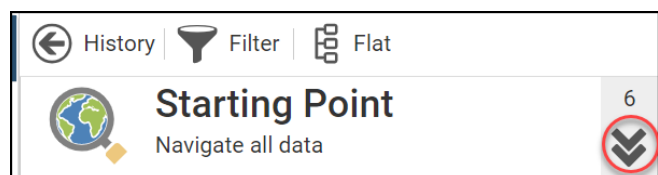
4. Select [Next >](#) to review your data.



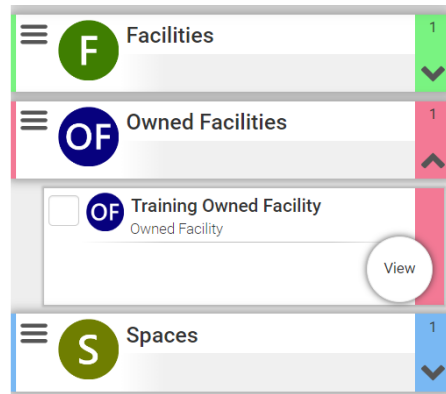
Data Review

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.

