



Create New Leased Facility Wizard – Overview

This job aid contains step-by-step instructions for FPMT’s new leased facility creation wizard. The new user interface simplifies this process by: (a) guiding you through each step of the process, (b) allowing you to either create a new facility (including geocoding) or link to an existing facility within the wizard, and (c) automatically linking the new tables.

- ✓ The wizard opens in a new window, which will close when you complete the 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 entire wizard process in one sitting. If you time out of FPMT during the process, you will lose your data.
✓ You navigate through the wizard by clicking the Next or Previous buttons.
✓ The wizard features business rules or validation checks that will alert users to missing data and common data entry errors.
✓ A new leased facility should be added to the system on or after the lease start date.
✓ Before creating a new facility, always search FPMT to ensure that it isn’t already part of the inventory.
✓ At a minimum, a new leased facility must include the following tables: leased facility, facility (either new or existing), space, lease contract, and at least one lease payment. Optional tables include: operating costs, condition matrix and lease option. The last step is data review which is optional but recommended.
✓ If the new leased facility is in scope for the Six-Year Facilities Plan:
- You can add your occupancy and workstation data inside the wizard while adding a new space.
- You will need to add annual operating costs for Fiscal Year 2020. You may use Fiscal Year 2019 annual operating costs as an estimate, or if you do not have actuals, you may use OFM’s estimated operating costs.
- You will need to attach a copy of the lease documentation outside of the wizard after you complete the new facility creation process. Instructions are included in this job aid.
✓ To complete this task, you will need a copy of the lease contract and a floor plan with the total square footage. If you are creating a new facility, you will also need the building’s parcel number and legislative district.

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Questions?



OFM Help Desk
HereToHelp@ofm.wa.gov
360.407.9100

Search for the Facility

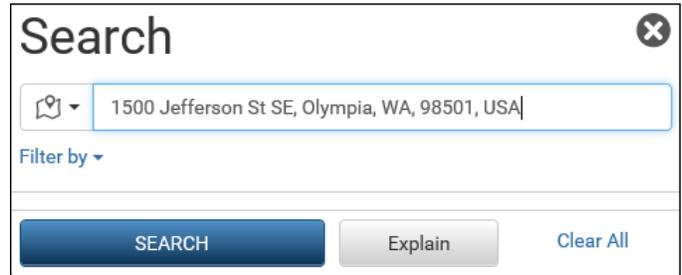
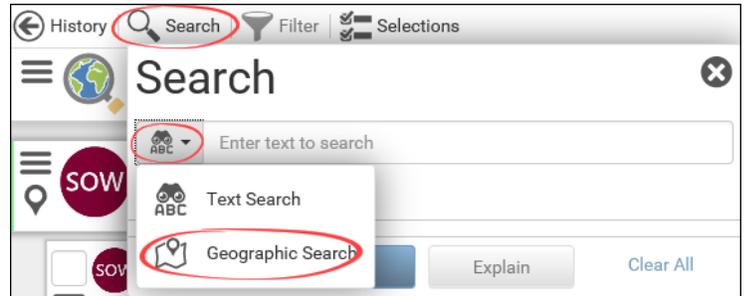
Note: A leased facility table must be associated with a facility table, which captures static information about the building, like the address and parcel number.

→ Always search FPMT for a facility before adding a new one to ensure that the building 1) is not occupied by another agency or 2) was not previously obligated to the state.

To search for a facility:

- A. Click the  Search button on the data explorer toolbar
- B. Click  and choose **Geographic Search** from the dropdown menu
- C. Enter the street address
- D. Click 

→ If the facility already exists in the inventory, you will link to that record as part of the wizard process instead of creating a new location.

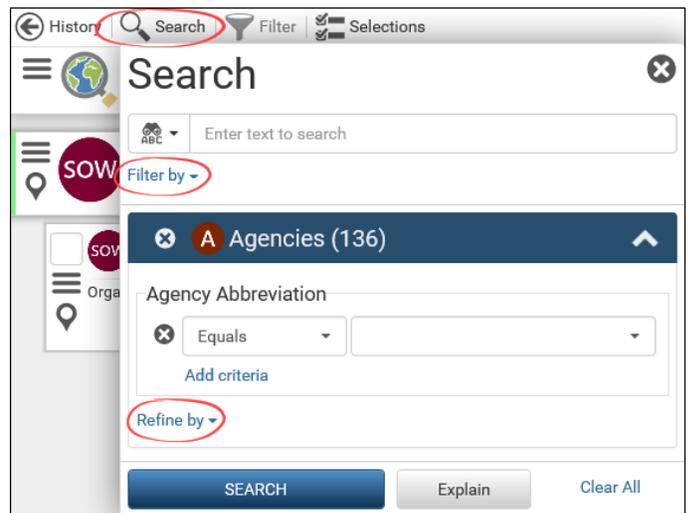


Launch the Wizard

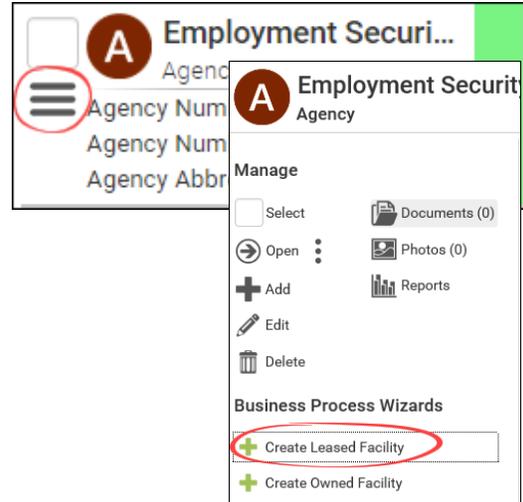
1. You access the leased facility creation wizard from the agency tile.

To navigate to your agency:

- A. Click the  Search button on the data explorer toolbar
- B. Click  and choose **Agencies** from the dropdown menu
- C. Click  and choose **Agency Abbreviation*** from the dropdown menu (*SAAM abbreviations)
 - You can also use SAAM numbers.
- D. Choose your agency from the list. You can filter the list by typing the abbreviation in the text box
- E. Click the  button

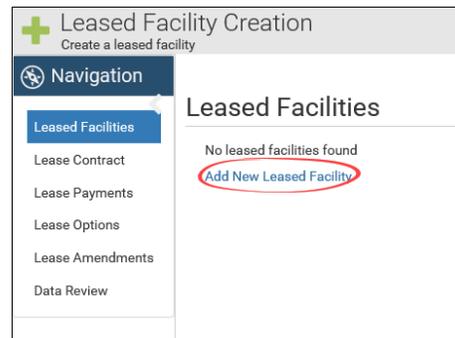


2. Click the  menu button on the Agency tile.
3. Click 



Add a New Leased Facility

1. Click Add New Leased Facility



2. Enter agency data – red fields are required

Field-specific guidance:

Name: Use the agency SAAM acronym and then the agency common name.

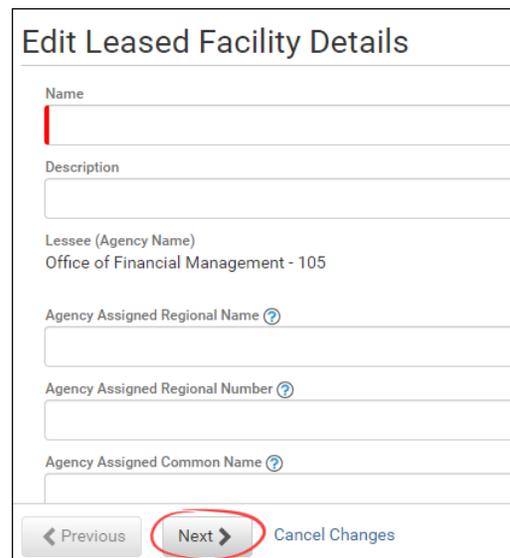
Example: ES-Yakima Worksource

Condition Assessment Score: This field is required by OFM. The Condition Matrix table, which is available later in the wizard, is an optional way to populate this score.

Six-Year Facilities Plan: If this is an in-scope facility, ensure this field is marked “yes.”

→ Additional guidance is available by clicking on the information icon  next to the field name

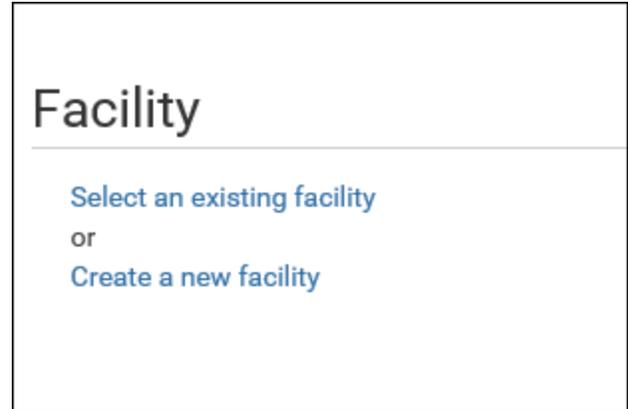
3. Click 



Facility – Add New or Link to Existing

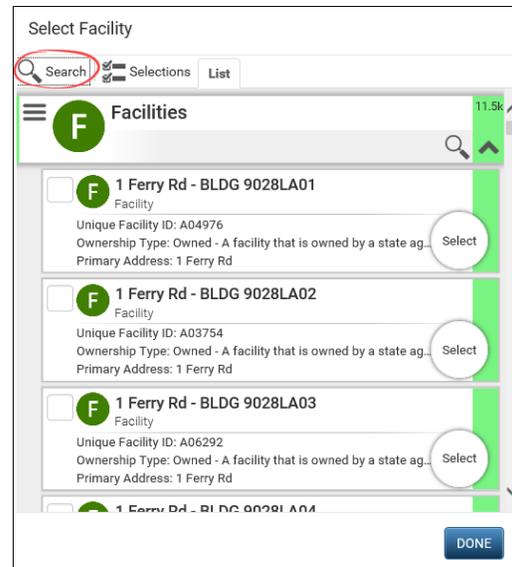
→ If you located an existing facility in your initial search, click **Select an existing facility**.

→ If you did not find an existing facility, click [Create a new facility](#).



Link to an Existing Facility

1. Click the  Search button to locate the existing facility

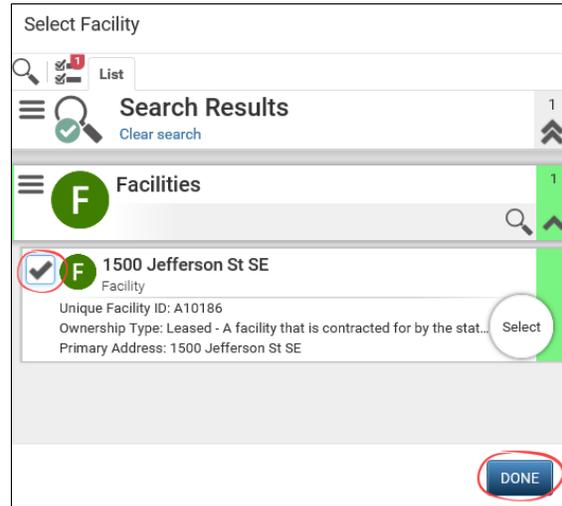


2. Enter the primary address in the search box using quotation marks

→ You can also use the UFI.



3. Click the checkbox next to the facility
4. Click Done

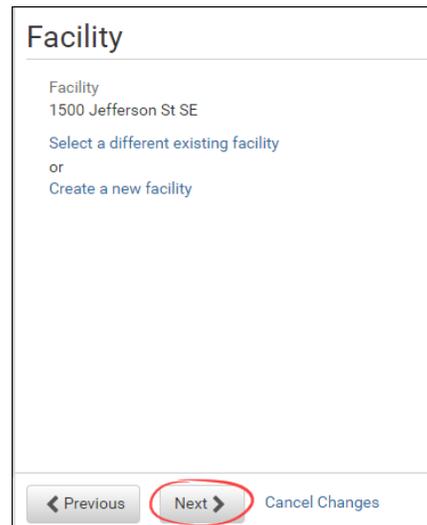


Your new leased facility is now associated with an existing facility record.

If you need to make a change, you can either **Select a different existing facility** or **Create a new facility**.

To continue, click

Click [here](#) to skip the new facility instructions and continue on to adding a new space.



Add a New Facility

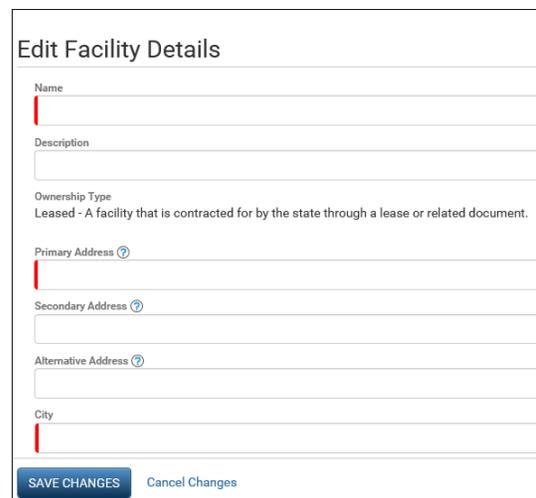
1. Enter agency data – red fields are required

Field-specific guidance:

➔ Additional guidance is available by clicking on the information icon (?) next to the field name.

Name: Use the primary address. If the facility address is not unique, include a building number.

Example: 1313 N 13th Ave – BLDG 1W165000



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

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

→ The address must be exact for the system to match addresses. If you are entering multiple facilities with the same primary address, make sure to use the same formatting (e.g., 1310 Jefferson St or 1310 Jefferson Street).

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.

Out of State Facility: 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. Fill in the city in the City – Out of State field.

Parcel Number: This information can be found on the county assessor’s website.

Latitude & Longitude: 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](#).

Homeland Security Region: The region is based on the county where the facility is located.

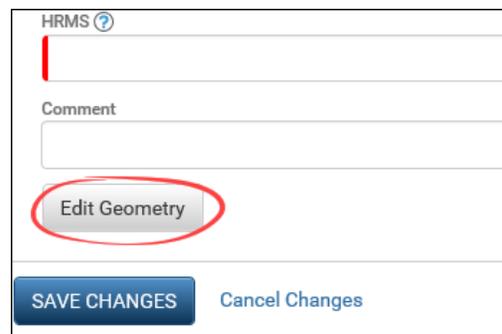
Property Class: Auto-populated based on the primary space type with the most square feet in the Space table.

Facilities Inventory System: Select YES if the facility is a building or other structure with at least one wall, a roof and a permanent foundation, regardless of occupancy.

Facility Status: New facilities are saved in Pending Approval status. OFM must review key data for accuracy and will change the status to Approved.

HRMS: Select YES if the facility serves as a duty station for employees.

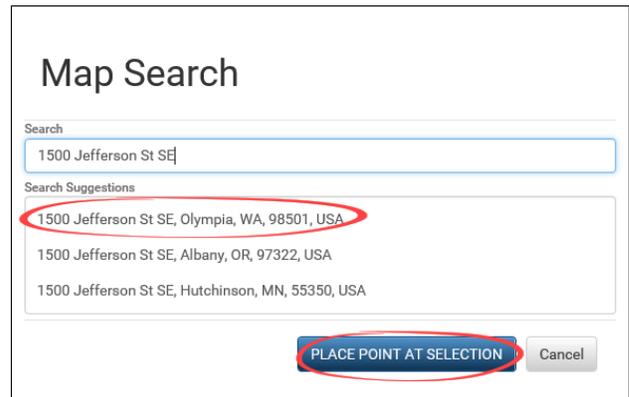
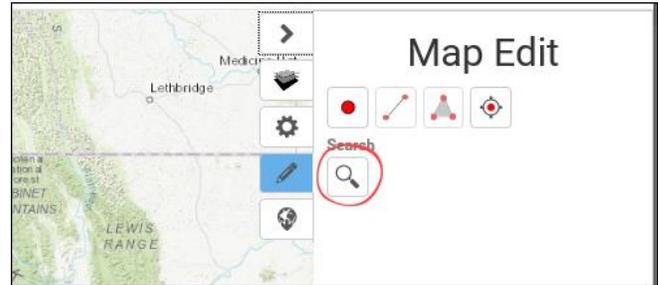
2. Click Edit Geometry to geocode the facility (put a point on the map)



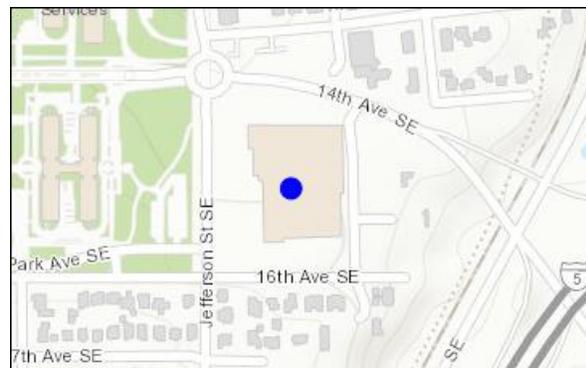
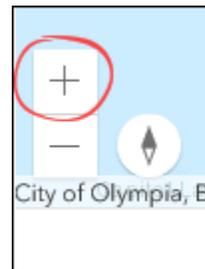
The screenshot shows a form with the following fields and buttons:

- HRMS (with a help icon)
- Comment
- Edit Geometry (button, circled in red)
- SAVE CHANGES (button)
- Cancel Changes (button)

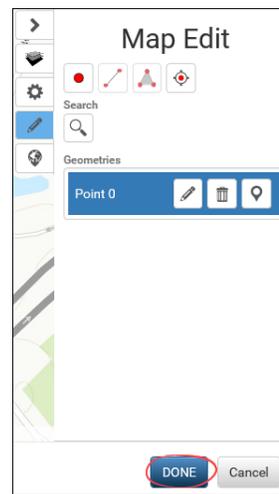
3. Click the search  button
4. Enter the street address – the system will populate addresses in the dropdown menu
5. Select the appropriate address
6. Click Place Point At Selection



7. Click 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. **Click** the dot – it will become light blue
 - B. **Move** the dot to the approximate center of the building
 - C. **Click** anywhere on the map to change the dot back to a darker blue
9. **Click Done**



Note: 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 in the Facility table.

HRMS ?

Comment

Edit Geometry

10. **Click SAVE CHANGES**

Edit Geometry

SAVE CHANGES Cancel Changes

Your new leased facility is now associated with a new facility record.

If you need to make a change, you can either **Edit Details** for your new facility or **Replace the facility with an existing facility**.

To continue, click [Next >](#)

Facility

Facility
New Facility [Edit Details](#)

[Replace the facility with an existing facility](#)

[< Previous](#)
[Next >](#)
[Cancel Changes](#)

Add a New Space

1. Click Add New Space

2. Enter data – red fields are required

Field-specific guidance:

Name: Tenant SAAM Acronym – Space ID

Example: DSHS - 0001

Space ID: A unique number to identify the space

Example: 0001

Note on square footage: The sum of all Space square feet cannot exceed the total Lease Contract square feet.

Square Feet Measurement Type: Dropdown menu

→ Refer to the [Facility Square Footage Measurement Guidelines](#) for more information.

Primary Space Type: Dropdown menu

→ Refer to the [Property Class & Space Type Categories job aid](#) for more information.

Note: If this leased facility is in scope for the Six-Year Plan, you must populate occupancy and workstation data fields.

→ Click the [?](#) next to each field for a definition of the term. If data for mobile benches, touchdown space or internally/externally mobile users is not available, leave those fields blank.

3. Click Save Changes

Lease Spaces

No lease spaces found

[Add New Space](#)

Edit Space Details

Name

Description

Space ID [?](#)

Tenant [?](#)

Other Tenant [?](#)

SAVE CHANGES
Cancel Changes

Number of Offices [?](#)

Number of Workstations [?](#)

Number of Mobile Benches [?](#)

Number of Touchdown Spaces [?](#)

Description of Unique Space Uses [?](#)

Number of Resident Users [?](#)

Number of Internally Mobile Users [?](#)

Number of Externally Mobile Users [?](#)

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

To add operating costs, click [Next >](#)

If the leased facility is in scope for the Six-Year Plan, you must report actual or estimated operating expenses.

If you do not need to add operating costs or a condition matrix, click [Next >](#) twice and then click

SAVE CHANGES

To skip to the Lease Contract section, click [here](#).

Lease Spaces			
Space Name	Space ID	Details	Delete
Space	001		
Add New Space			

[← Previous](#)
[Next >](#)
[Cancel Changes](#)

Add Operating Costs

1. Click Add New Operating Costs
2. Enter data – red fields are required

Name: Fiscal Year (e.g., FY 2019)

Operating Costs ID: A number to identify the Record (e.g., 1)

Fiscal Year: Enter 2020

→ It is critical that this field is properly populated. OFM's baseline report pulls data based on this field.

3. Click SAVE CHANGES

To add a condition matrix, click [Next >](#)

If you do not need to add a condition matrix, click [Next >](#) and then click **SAVE CHANGES**

To skip to the Lease Contract instructions, click [here](#).

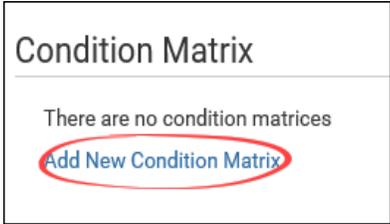
Operating Costs
 There are **no operating costs**
[Add New Operating Costs](#)

Edit Operating Costs Details

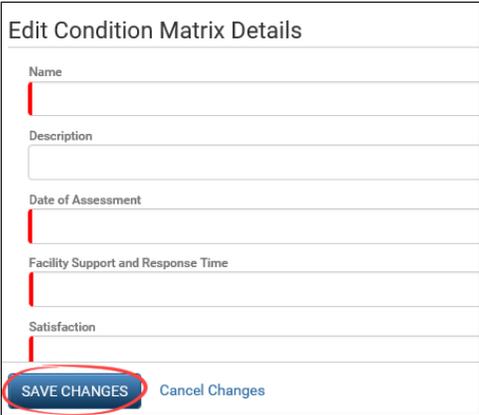
Name	<input type="text"/>
Description	<input type="text"/>
Operating Costs ID	<input type="text"/>
Fiscal Year	<input type="text"/>
Parking Annual Cost	<input type="text"/>
Assessment Annual Cost	<input type="text"/>
SAVE CHANGES Cancel Changes	

Add a Condition Matrix

1. Click Add New Condition Matrix

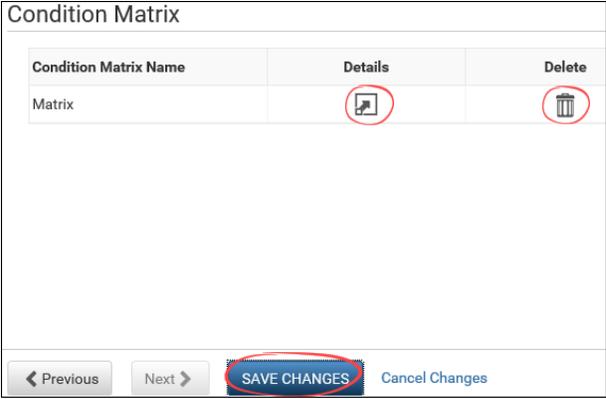


2. Enter data – red fields are required
 → For more information, refer to the [Condition Matrix job aid](#).
3. Click Save Changes



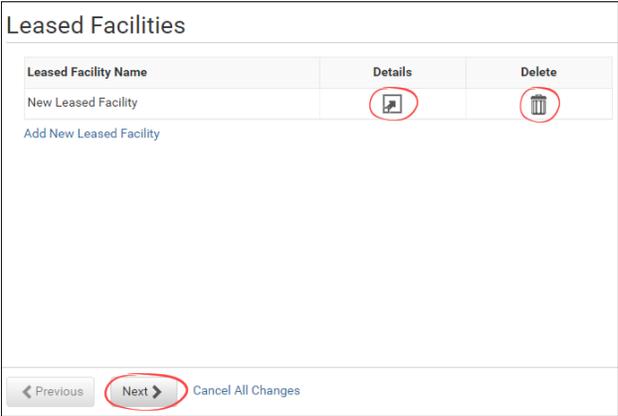
→ Once the condition matrix is saved, you can update the information by clicking Details or delete it by clicking on the trash can.

 → To continue, click Save Changes



→ You will now see your new leased facility table. You can edit the data by clicking the Details button or delete the table by clicking the trash can.

 → To continue, click [Next >](#)



Add a Lease Contract

1. Enter agency data – red fields are required

Field-specific guidance:

Name: Use the lease number

Example: SRL 03-0161

→ Lease contract numbers must be unique and cannot be used for more than one record.

2. Click 



Edit Lease Contract Details

Name

Description

Lease Number

Lessor

Lessee (Agency Name)

Add a Lease Payment

1. Click Add New Lease Payment

2. Enter data - red fields are required

Field-specific guidance:

Name: Use the payment type and payment series number

Example: Base Rent - 1

Payment Type: Dropdown menu – Base Rent, Amortized TI or Other

Payment Series Number: Payments should be numbered sequentially

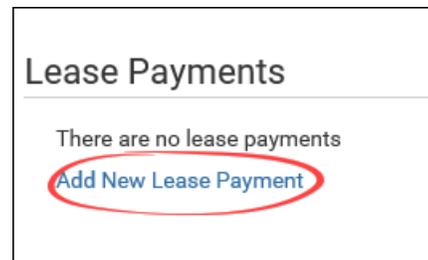
Example: 1, 2, 3

3. Click Save Changes

Note: At least one lease payment is required. If there is no base rent, enter a payment for \$0.

→ Repeat this process if there is more than one lease payment series. All payments can have an Active status, as reports pull data based on the date the report is run.

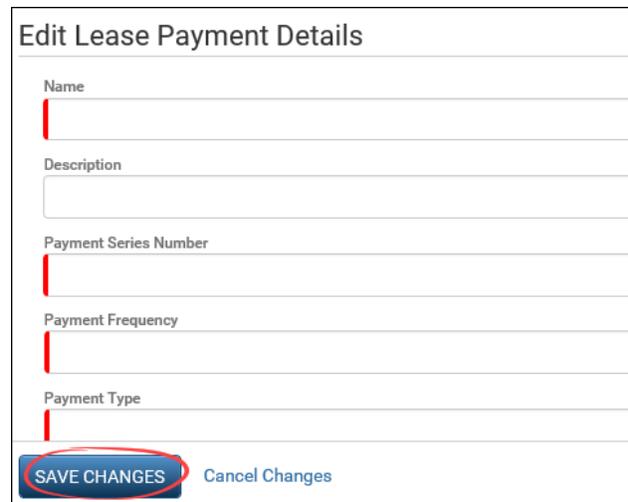
→ Even if the lease is being entered retroactively, all lease payment series must be entered for accurate cash flow reports.



Lease Payments

There are no lease payments





Edit Lease Payment Details

Name

Description

Payment Series Number

Payment Frequency

Payment Type

➔ Once the lease payment is saved, you can update the information by clicking the Details icon or delete the payment by clicking on the trash can.

To add a lease option, click [Next >](#)

If you do not need to add a lease option, click [Next >](#) until you reach the [Data Review](#) section.

Payment Name	Payment Series Number	Details	Delete
Base Rent - 1	1		

Add New Lease Payment

[< Previous](#)
[Next >](#)
[Cancel All Changes](#)

Add a Lease Option (if applicable)

1. Click Add New Lease Option

2. Enter data – red fields are required

Field-specific guidance:

Name: Use the option type and option number

Example: Cancel – 1

Option Number: Options should be numbered in the order they appear in the lease contract

Example: 1, 2, 3

Option Type: Dropdown menu – Purchase, Expand, Cancel, Reduce or Renew

Option Description: The description should provide a brief summary of the clause in the lease.

Example: Cancellation of the lease is possible with 90 days' notice after year 3

3. Click Save Changes

Lease Options

There are no lease options

[Add New Lease Option](#)

Edit Lease Option Details

Name

Description

Option Number

Option Type

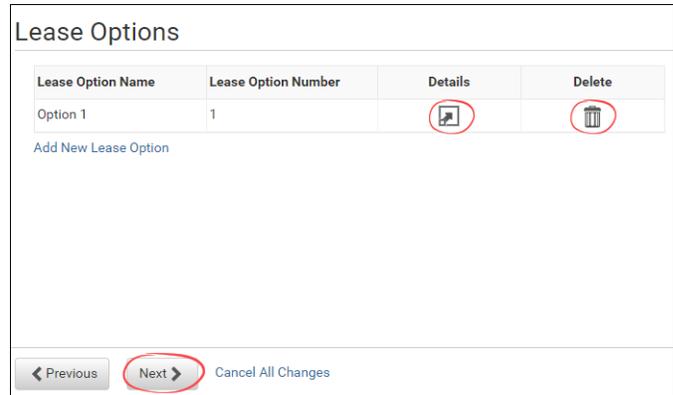
Option Description

[SAVE CHANGES](#)
[Cancel Changes](#)

→Once the lease option is saved, you can update the information by clicking the Details icon or delete the option by clicking on the trash can.

To continue, click **Next >** until you have reached the Data Review section.

→Data review is optional but recommended.



Lease Option Name	Lease Option Number	Details	Delete
Option 1	1		

Add New Lease Option



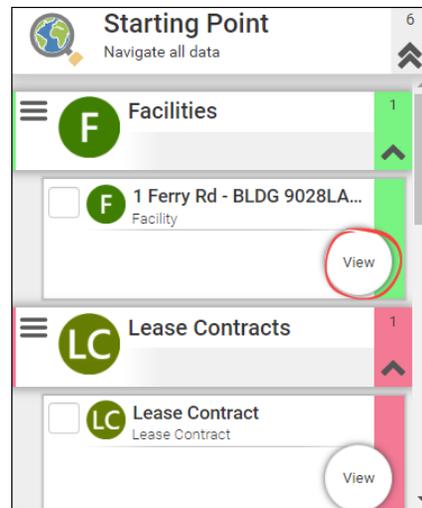
History | Filter | **Hierarchy**



Starting Point 6
Navigate all data

Review Your Data

1. Click the  Hierarchy button to change to the  Flat view. You can now see all the tables you have added or edited as part of the wizard process.
2. Click the arrows  on the Starting Point tile to expand all of the tiles below.
3. Click View on each tile to see the data you have entered.
4. Review the data.
5. Click Save and Close
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, click YES.



Starting Point 6
Navigate all data

F Facilities 1

F 1 Ferry Rd - BLDG 9028LA...
Facility View

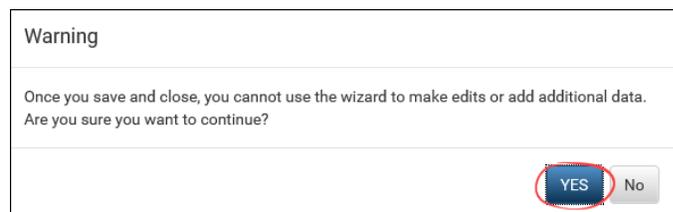
LC Lease Contracts 1

LC Lease Contract
Lease Contract View



→When you Save and Close, 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.

→If this is an in-scope facility for the Six-Year Plan, continue to the next step below

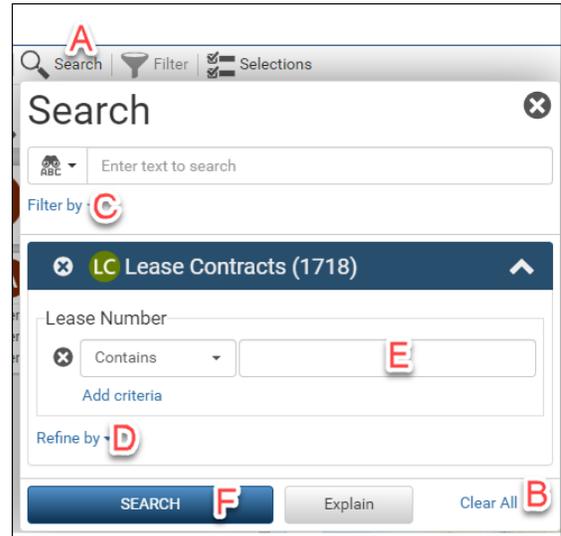


Warning

Once you save and close, you cannot use the wizard to make edits or add additional data. Are you sure you want to continue?

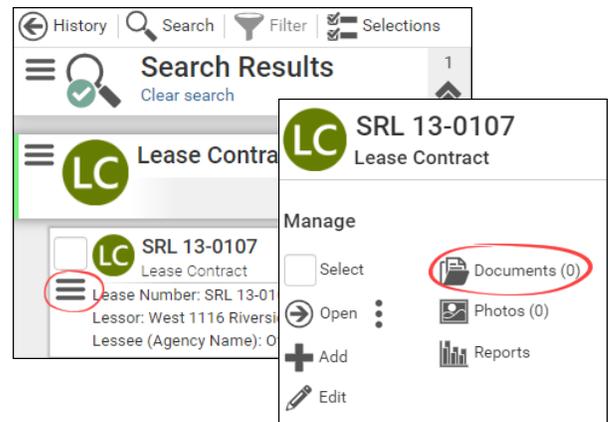
Attach Copy of the Lease Contract

1. Navigate to the new Lease Contract.
 - A. Click the  Search button on the data explorer toolbar
 - B. Click 
 - C. Click  and choose **Lease Contracts** from the dropdown menu
 - D. Click  and choose **Lease Number** from the dropdown menu
 - E. Enter the Lease Number
 - F. Click the  button



2. Click the  menu button on the Lease Contract tile.
3. Click Documents

→ The document management screen will open in a new window.



4. Click the  Upload button
5. Browse for or drag and drop the file(s)
6. Click Close

