



Create New Owned Facility Wizard – Overview

This job aid contains step-by-step instructions for FPMT’s new owned facility creation wizard. The new user interface simplifies this process by: (a) guiding you through each step of the process, (b) allowing you to create a new facility (including geocoding) 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 owned facility should be added to the system on or after occupancy.
✓ At a minimum, a new owned facility must include the following tables: facility, owned facility, and space. Optional tables include: condition matrix, debt service, and operating costs. The last step is data review which is optional but recommended.
✓ If the new owned facility is in scope for the Six-Year Facilities Plan:
- You can add can 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.
✓ To complete this task, you will need a copy of the deed 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?

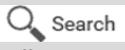


OFM Help Desk
HereToHelp@ofm.wa.gov
360.407.9100

Launch the Wizard

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

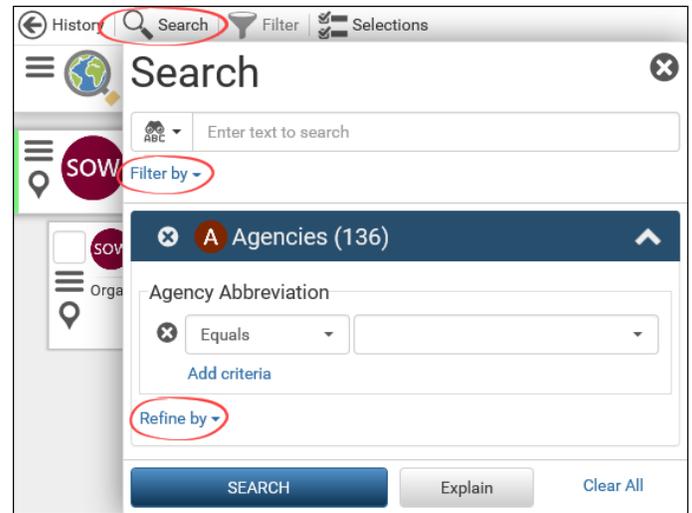
To navigate to your agency:

- A.** Click the  Search button on the data explorer toolbar
- B.** Click **Filter by** and choose **Agencies** from the dropdown menu
- C.** Click **Refine by** and choose **Agency Abbreviation** from the dropdown menu

→ These are SAAM abbreviations, which may not be the same as an agency's common abbreviation. You can also search by SAAM number.

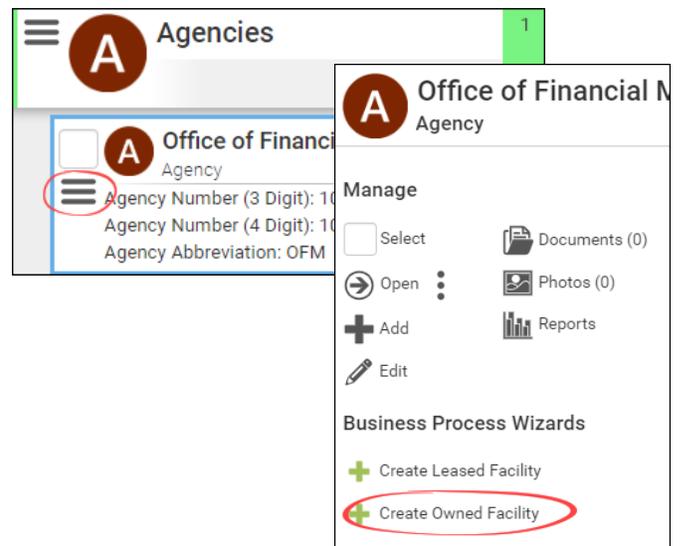
D. Choose your agency from the list. You can filter the list by typing the abbreviation in the text box

E. Click the  button



2. Click the  menu button on the Agency tile.

3. Click 





Add a New 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

Facility	
Name	<input type="text"/>
Description	<input type="text"/>
Ownership Type	Owned - A facility that is owned by a state agency.
Primary Address (?)	<input type="text"/>
<input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel All Changes"/>	

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.

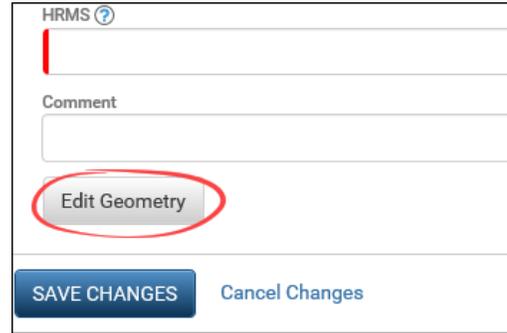
Property Class: Auto-populated based on the primary space type with the most square feet in the Space table.

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)



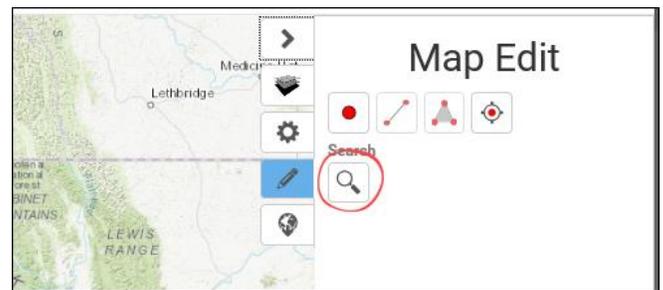
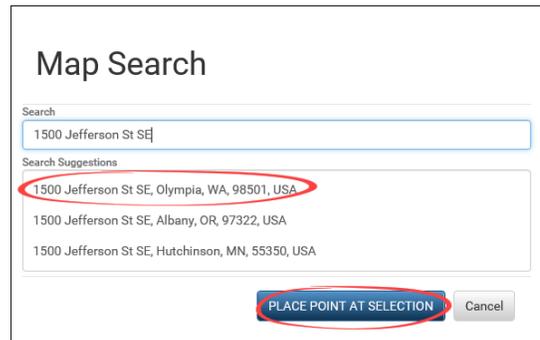
HRMS ?

Comment

Edit Geometry

SAVE CHANGES Cancel Changes

- 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**

Map Search

Search

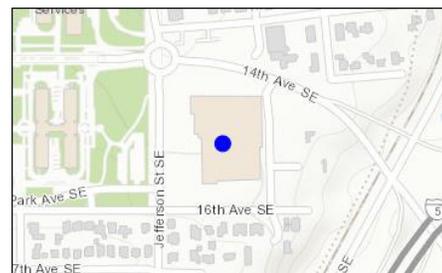
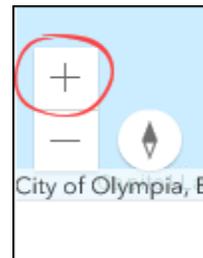
1500 Jefferson St SE]

Search Suggestions

- 1500 Jefferson St SE, Olympia, WA, 98501, USA**
- 1500 Jefferson St SE, Albany, OR, 97322, USA
- 1500 Jefferson St SE, Hutchinson, MN, 55350, USA

PLACE POINT AT SELECTION Cancel

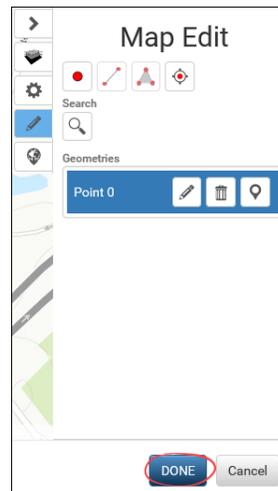
- 7. Click the  button to zoom in on the map**
- A dark blue dot will appear at the specified address.



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.

10. **Click** Next >

Facility

Name

Description

Ownership Type
Owned - A facility that is owned by a state agency.

Primary Address ?

< Previous
Next >
Cancel All Changes

Add a New Owned Facility

1. Enter date – red fields are required

Field-specific guidance:

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

Example: DSHS-19-Auditorium

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.

2. Navigate to the next needed table:

To add a condition matrix, click 

To add debt service, click  twice.

→ If the owned facility is in scope for the Six-Year Plan and has debt service, you must add this table.

To add operating costs, click  three times.

→ If the owned facility is in scope for the Six-Year Plan, you must add operating costs.

If you do not need to add a condition matrix, debt service or operating costs, click  four times to reach the Owned Facility Spaces section.

Owned Facility

Name

Description

Unique Facility Identifier 

Agency Name 
Office of Financial Management - 105

Agency Assigned Regional Name 

Agency Assigned Regional Number 

Agency Assigned Common Name 

< Previous
Next >
Cancel All Changes

Add a Condition Matrix

1. Click Add New Condition Matrix

Owned Facility Condition Matrix

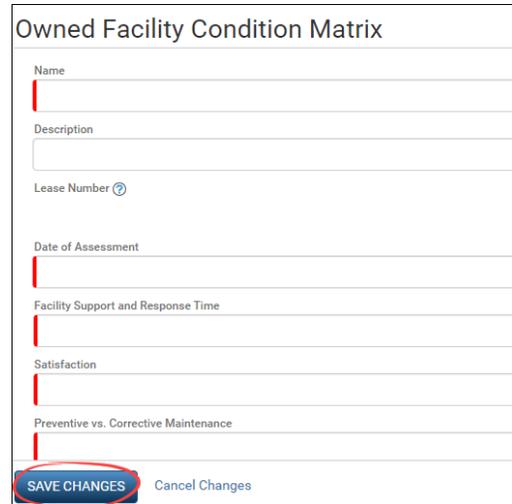
There are no condition matrices

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.

4. Navigate to the next needed table:

To add debt service, click Next >

To add [Operating Costs](#), click Next > twice.

If you do not need to add debt service or operating costs, click Next > three times to reach the [Owned Spaces](#) section.

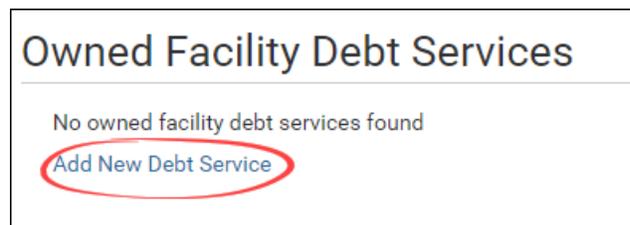


Condition Matrix Name	Details	Delete
Condition matrix		



Add Debt Service

1. Click Add New Debt Service



2. Enter data – red fields are required

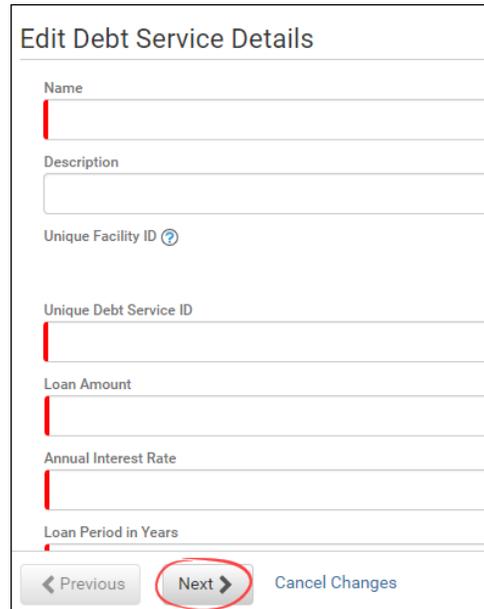
Field-specific guidance:

Name: Use the unique service ID found on your debt service documentation

Example: S179-269-01

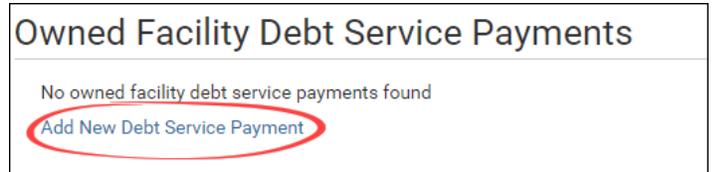
Unique Debt Service ID: Same as name

3. Click 



Add Debt Service Payment

1. Click Add New Debt Service



2. Enter data – red fields are required

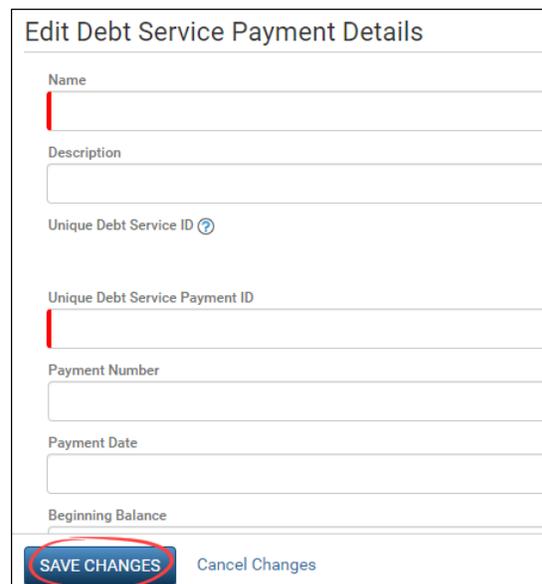
Field-specific guidance:

Name: Year – Number (1-20 or 1-40)

Example: 2010 - 1

Unique Debt Service Payment ID: Same as Name

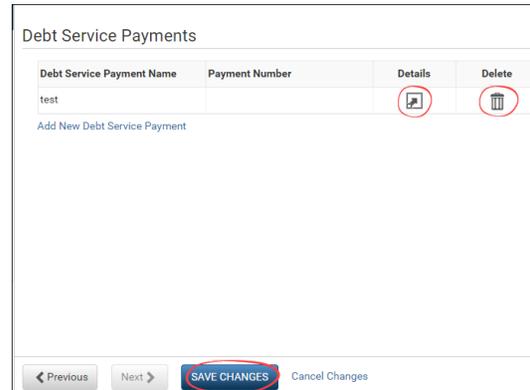
3. Click SAVE CHANGES



→ Once a Debt Service Payment is saved, you can make edits by clicking on the Details icon or delete it by clicking on the trash can.

4. Repeat the process for all payments

5. Click Save Changes



Debt Service Payment Name	Payment Number	Details	Delete
test			

Add New Debt Service Payment

6. Navigate to the next needed table:

To add Operating Costs, click

If you do not need to add operating costs, click twice to reach the [Owned Facility Spaces](#) section.



Operating Costs

There are **no** operating costs

Add Operating Costs

1. Click Add New Operating Costs

2. Enter data – red fields are required

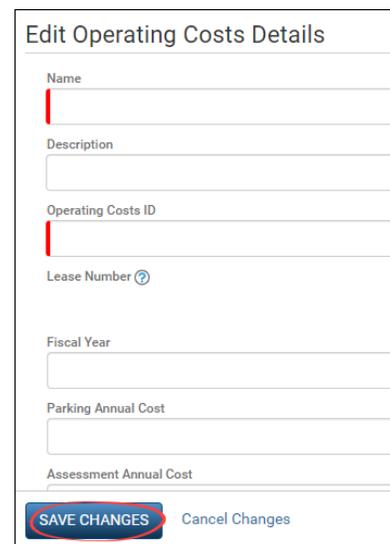
Name: Fiscal Year (e.g., FY 2019)

Operating Costs ID:

Fiscal Year: 2020

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

3. Click SAVE CHANGES



Edit Operating Costs Details

Name

Description

Operating Costs ID

Lease Number

Fiscal Year

Parking Annual Cost

Assessment Annual Cost

4. Click to add a space



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: OFM - 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 Owned Facility 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.

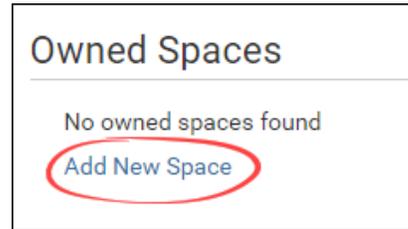
Note: If this owned facility is in scope for the Six-Year Plan, you must populate occupancy and workstation data fields:

- Number of Offices
- Number of Workstations
- Number of Mobile Benches
- Number of Touchdown Spaces
- Number of Resident Users
- Number of Internally Mobile Users
- Number of Externally Mobile Users

→ Click the  next to the field name for a definition of each term.

→ If data for mobile benches, touchdown spaces and internally/externally mobile users is not available, leave those fields blank.

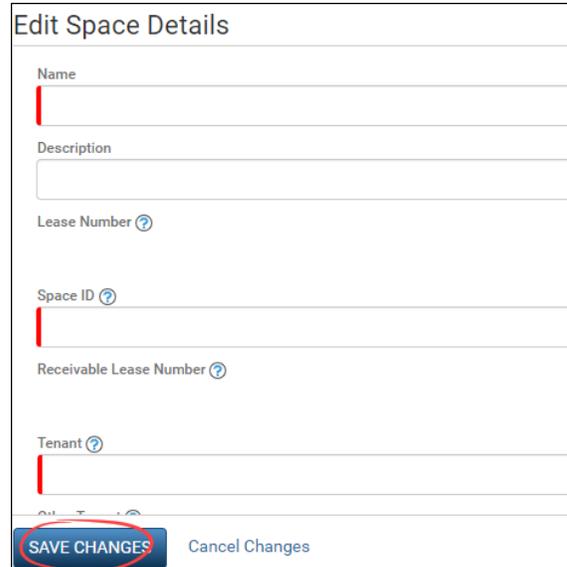
3. Click Save Changes



Owned Spaces

No owned spaces found

[Add New Space](#)



Edit Space Details

Name

Description

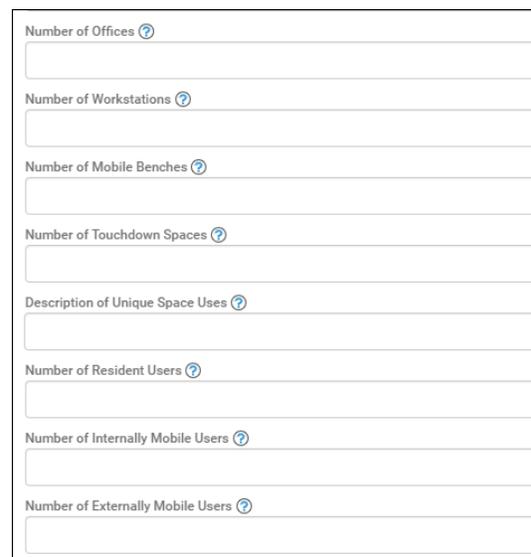
Lease Number ?

Space ID ?

Receivable Lease Number ?

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 ?

→ You can now edit the Space table by clicking on the Details icon or delete it by clicking on the trash can.

4. Click Next > to review your data.

Owned Spaces

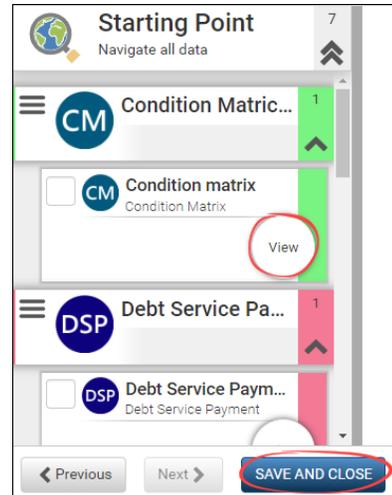
Space Name	Space ID	Details	Delete
Test Space	0001		

[Add New Space](#)

< Previous
Next >
Cancel All Changes

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.



→ 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.

