Deactivation Wizard
Facilities Portfolio Management Tool (FPMT)

Deactivation Wizard – Overview
This job aid contains step-by-step instructions for FPMT’s deactivation wizard, which can be used for owned, leased and receivable leased facilities.

✓ You should use this wizard when:
  ▪ An owned facility is no longer obligated to the state because it has been sold, demolished or transferred. The data will remain in the system but will no longer be included in reports.
  ▪ A leased facility has been vacated due to relocation or building closure. The data will remain in the system but will no longer be included in reports.
  ▪ A receivable leased facility has been vacated by the tenant agency. The data will remain in the system but will no longer be included in reports.
  
✓ The wizard will automatically deactivate all tables associated with the owned, leased or receivable leased facility.
  ▪ For owned facilities, the wizard will automatically deactivate the facility table.
  ▪ If there is only one leased facility associated with the facility record, the wizard will automatically deactivate the facility table.
  ▪ If there are multiple active leased facilities associated with the facility record, you will not be able to deactivate the facility record. Each leased facility must be deactivated separately.

Note: Agency Editors cannot delete records. Contact the Help Desk if a record was created in error.

Contents
Deactivate a Facility – Overview ................................................................. 1
Deactivate an Owned Facility ................................................................. 2
Deactivate a Leased Facility ................................................................. 3
Deactivate a Receivable Leased Facility .................................................. 5
Deactivate an Owned Facility

1. **Navigate** to the Owned Facility tile
   A. Click the button on the data explorer toolbar
   B. Click **Filter by** and choose **Owned Facilities** from the dropdown menu
   C. Click **Refine by** and choose **Unique Facility Identifier** from the dropdown menu

   ➔ If you need to locate a UFI, run the Owned Facilities Inventory Report from your agency tile

   D. **Enter** the UFI
   E. Click the button

2. Click the menu button on the Owned Facility tile
3. Click **Deactivate**
4. **Populate** the Owned Facility Inactive Reason

⇒ This is a dropdown field: demolished, sold, transferred title, other, or delete (inaccurate or duplicate record)

5. Click **SAVE AND CLOSE**

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Deactivate a Leased Facility

1. **Navigate** to the Leased Facility tile
   
   A. **Click** the **Search** button on the data explorer toolbar
   
   B. **Click** Filter by ▼ and choose **Leased Facilities** from the dropdown menu
   
   C. **Click** Refine by ▼ and choose **Unique Facility Identifier** from the dropdown menu

⇒ To locate a UFI, run the Leased Facilities Inventory report from the Agency tile.

D. **Enter** the UFI

E. **Click** **SEARCH**

2. **Click** the menu button on the Lease Contract tile

3. **Click** **Deactivate**
4. **Populate** the Leased Contract Inactive Reason

→ This is a dropdown field: cancelled, closed, expired, or delete (inaccurate or duplicate record)

5. **Populate** the Leased Facility Inactive reason

→ This is a dropdown field: cancelled, closed, Expired, or delete (inaccurate or duplicate record)

6. **Click** [SAVE AND CLOSE]

If the facility has more than one active leased facility associated with it, you will not be able to deactivate the Facility record as part of the wizard process. You will receive this message.

In this case, you would need to deactivate the leased facilities separately. Once there is only one active leased facility associated with the Facility record, FPMT will automatically deactivate the Facility as part of the wizard process.
Deactivate a Receivable Leased Facility

1. Navigate to the Receivable Leased Facility tile
   A. Click the Search button on the data explorer toolbar
   B. Click Filter by and choose Receivable Leased Facilities from the dropdown menu
   C. Click Refine by and choose Receivable Leased Number from the dropdown menu
   ➔ To locate a receivable lease number, run the Receivable Lease Contract Inventory report from the Agency tile.
   D. Enter the Receivable Lease Number
   E. Click

2. Click the menu button on the Receivable Lease Contract tile

3. Click

4. Populate the Receivable Leased Contract Inactive Reason
   ➔ This is a dropdown field: cancelled, closed, expired, or delete (inaccurate or duplicate record)

5. Populate the Receivable Leased Facility Inactive Reason
   ➔ This is a dropdown field: cancelled, closed, expired, or delete (inaccurate or duplicate record)

6. Click SAVE AND CLOSE