



Facilities Portfolio Management Tool User Guide

Version 3.5.18285.1 • 19 April 2019



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Where to get help

Support may be obtained as follows:

Technical support

Questions about logging in, password help, security questions, contact WaTech Solutions Center

Phone: 360-586-1000

Email: Support@watech.wa.gov

Facilities support

Questions about business processes, adding or updating facilities, or geocoding facilities, contact OFM Facilities Planning

Phone: 360-407-2671

Email: fpmtsupport@ofm.wa.gov

Your comments

Your suggestions will help us continue to improve the accuracy, organization, and overall quality of user publications. Please email your comments to: fpmtsupport@ofm.wa.gov

Document History

Revision History

Below is a record of changes to the GoRPM User Guide:

Revision Number	Revision Date	Summary of Changes	Author
Version 3.5.18285.1	January 10, 2019	Revised per newest user interface changes	R&K Solutions, Inc.
Version 3.5.18285.1	April 19, 2019	Updated to reflect current business processes	OFM Facilities

Approvals

This document requires the following approvals:

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Distribution

This document has been distributed to:

Name	Title

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1. Introduction

1.1 Overview

Facilities owned and leased by state agencies represent a significant financial investment by the citizens of Washington. Since 1997, [RCW 43.82.150](#) has required an annual inventory of these facilities. This inventory is one of several sources of information that support the Office of Financial Management's (OFM) oversight responsibilities for leased and owned facilities. The inventory provides critical information to the Legislature, various state agencies and OFM for budget development, strategic facilities planning and facilities analysis and reporting functions.

As of 2017, state agencies will report annual facilities inventory data using the Geospatial Real Property Management (GoRPM) Facilities Portfolio Management Tool (FPMT). The purpose of this User Guide is to provide instruction on the use of FPMT to users responsible for this inventory.

OFM appreciates each agency taking the time to provide a complete and accurate facility inventory.

1.2 Scope

The scope of this User Guide is to:

- Provide step-by-step instructions on using GoRPM FPMT, with a focus on a typical end-user.
- Describe basic features and functionality of the software.
- Provide detailed State of Washington business processes for facilities reporting.

This guide shows full permissions, but screens will vary based on user permissions. Different roles have permission to create, read, update and delete different data, and to use different functions in the system.

A User Manager manages user accounts and controls access to the system using roles. Only users with User Manager privileges can access the User Management system configuration module. A separate manual is available for User Management.

A **Glossary of Terms and Acronyms** used in the manual is included as [Appendix A](#).

This document serves as the sole reference for the scope of the system functionality to be delivered by R&K Solutions to the State of Washington. Any change to the scope of the project or the Functional Specifications will require agreement via the change control process defined in the agreement between R&K Solutions and the State of Washington.

1.3 Environment

GoRPM may be used on a PC, Mac, Android, or IOS device, and with most current major Internet browsers, up to the last three minor versions. JavaScript support must be enabled. Supported browsers include:



Chrome



Firefox



Internet Explorer (version 11)



Safari

A PDF reader such as Adobe Reader is required. Most web browsers have built-in support for PDF reading.

1.3.1 Font Size

To increase or decrease the default viewing font size, change the zoom level in the browser (the steps for modifying the zoom level are slightly different for each browser).

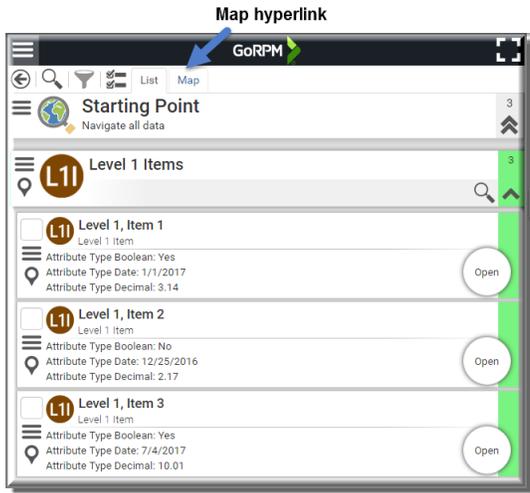
You may also press and hold the **Ctrl** key and press either the **+** (plus) or **-** (minus) key on the top of the keyboard, in the same row as the number keys, to increase and decrease the font size.

Tip: All browsers support pressing the **Ctrl** key and **0** (zero) at the same time to reset the font back to the default font.

1.3.2 Responsive Web Design

The GoRPM web application uses Responsive Web Design. Responsive Web Design is the practice of building a website suitable to work on every device and every screen size, no matter how large or small, mobile or desktop. It switches between these options on-the-fly.

Although the GoRPM application is compatible with the many different devices being used today, the screens you see may be affected by the device you use to view. For example, the screen on the left below is a condensed version of the screen on the right. In normal viewing, the map is available, and all buttons appear in the header bar. Note the map hyperlink on the condensed version of the screen.

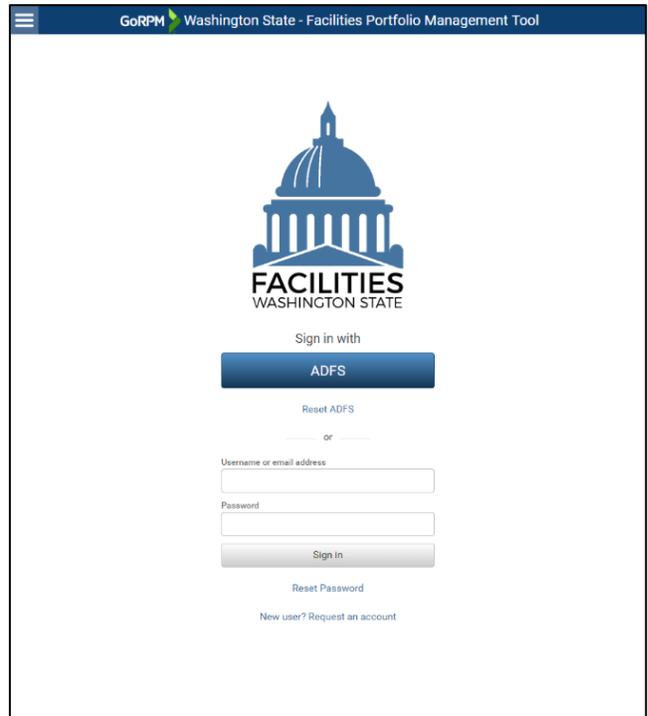
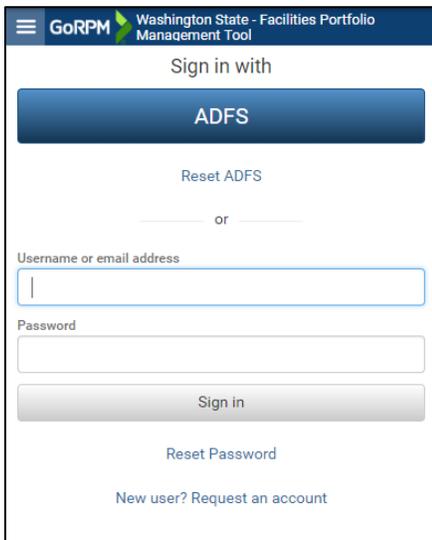


Condensed/Mobile View



Normal/Desktop View

As shown in the **Sign in** screen below, input controls appear larger in the mobile view on the left than in desktop view on the right:



An example of another difference in viewing based on device is that popup windows opened in mobile mode have a tinted overlay under the popup to draw attention.

1.4 Document Conventions

This document uses the following style conventions:

- **Bold** – names of commands, options, programs, processes, and interface elements (such as windows, dialog boxes, buttons, fields, and menus), interface elements the user selects, clicks, presses, or types
- *Italic* - variable information, user-supplied information, and emphasis (for example, a new term)
- Square brackets [] enclose optional values
- Angle brackets < > enclose user-supplied values
- Vertical bar | indicates alternate selections - the bar means “or”
- Braces { } indicate content that you must specify (that is, x or y or z)

Click, touch or tap- The GoRPM web-based application may be used on a classic mouse-driven computer, a mobile phone, or a tablet device. Throughout the step-by-step instructions, the term "click" is used. If using a device with a touch interface, please substitute the term "touch" or "tap."

Section 508 Compliant - in the US, [Section 508 of the U.S. Rehabilitation Act](#) mandates that web content maintained by the federal government be made accessible to people with disabilities. GoRPM software and this guide comply with requirements to the fullest extent possible to make online content accessible to people with disabilities. For example, wherever possible, content can be operated through a keyboard:

- Use the **Tab** key on the keyboard to navigate through links and form controls; **Shift + Tab** navigates backwards.
- Use **Enter** or **Spacebar** to select an element.
- Use the **Spacebar** to check or uncheck a checkbox.

2. Getting Started

The Getting Started section explains how to sign into GoRPM as a first-time user.

User accounts can be set up three different ways using:

- GoRPM authentication (user name and password)
- Active Directory Federation Services (ADFS) authentication.

ADFS is a Single Sign-On (SSO) solution created by Microsoft. ADFS allows single sign on access to systems and applications across the state.

Only users with State Global Network (SGN) Active Directory accounts synchronized to Microsoft's Azure cloud platform can utilize this option.

Note: Contact your IT department to determine if your user account meets this criteria

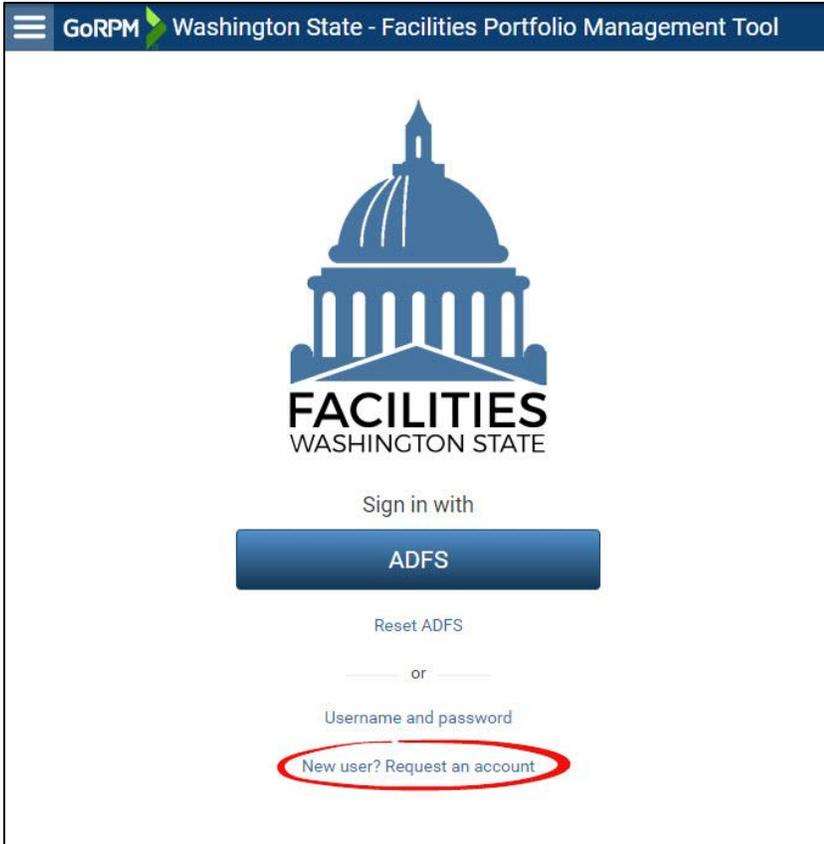
- Both GoRPM and ADFS authentication. ADFS users have the option to set up their account to use GoRPM authentication (user name and password) in addition to ADFS. Thus, a user could log in using either option.

2.1 Request an account

2.1.1 Using GoRPM Authentication (User name and password)

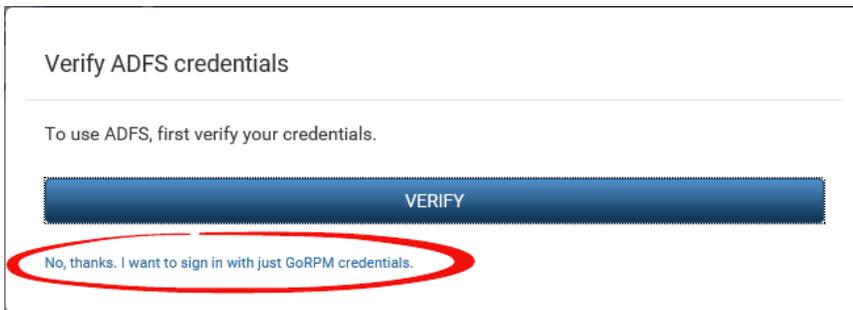
Go to <https://fpmt.gorpm.com>.

The **Sign In** screen appears, as shown below.



Click the **New user? Request an account** hyperlink.

The **Verify ADFS credentials** popup window appears.



Click the **No, thanks. I want to sign in with just GoRPM credentials.**

The **Request an Account** screen appears.

The screenshot displays the 'Request an Account' interface. At the top, there is a navigation bar with the GoRPM logo and a title bar containing a key icon, the text 'Request an Account', and the subtitle 'Request a user account for GoRPM'. Below the title bar, a light blue banner indicates 'Third Party Authentication: Not Verified' with an information icon. The form is organized into several sections: 'Email' with two input fields; 'My Information' with fields for 'First name', 'Last name', 'Phone', and 'Title'; and 'Security Questions' which contains three identical sets of a dropdown menu for the question, an 'Answer' field, and a 'Confirm Answer' field. At the bottom of the form, there is a blue 'SUBMIT' button and a 'Cancel' link.

Enter your email address, user information, security questions and answers. For added security, security questions are required to set or reset your password. Be sure to remember your answers. Fill in the **Title** field with your agency acronym followed by job title. **Example:** DES Facilities Planner

Note: Leading and trailing whitespaces in answers get trimmed, and answers are not case sensitive.

After entering all required information, as shown, click **Submit**.

The screenshot shows the 'Request an Account' form in the GoRPM application. At the top, there is a 'Third Party Authentication' status of 'Not Verified'. The form contains the following fields:

- Email: demo@gorpm.com
- Confirm email: demo@gorpm.com
- My Information:
 - First name: Demo
 - Last name: User
 - Phone: 540-343-7300
 - Title: Technical Writer
- Security Questions:
 - Question 1: What was model of your first car? Answer: Tesla
 - Question 2: What was your childhood phone number including area code? (e.g., 000-000-0000) Answer: 000-000-0000
 - Question 3: What was the name of your first stuffed animal? Answer: Teddy

At the bottom of the form, there is a blue 'SUBMIT' button and a 'Cancel' link. The 'SUBMIT' button is circled in red.

A **Next Step** screen appears, as shown, notifying you of your email address verification. Click **OK**.

The screenshot shows the 'Next Step' notification screen in the GoRPM application. The screen displays the following text:

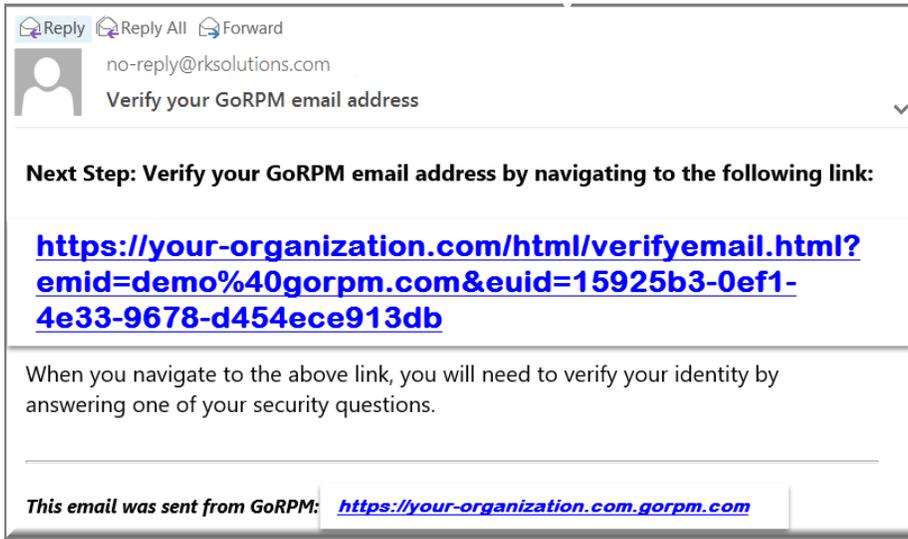
Next Step

We need to verify your email address before your request for an account can be reviewed.

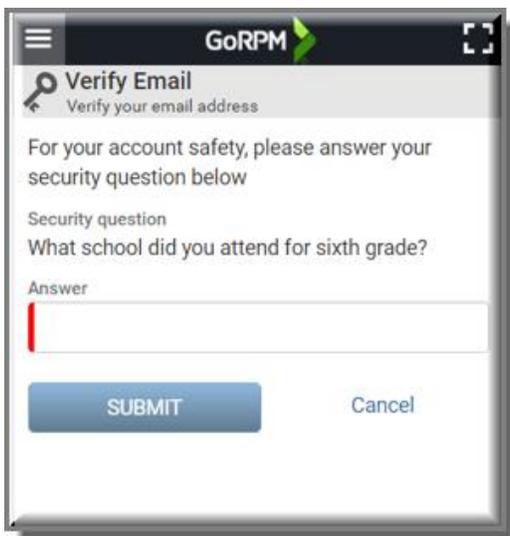
A link has been sent to demo@gorpm.com.

At the bottom of the screen, there is a blue 'OK' button, which is circled in red.

Check your email inbox for a verification message, as shown below. Click the link in the email.

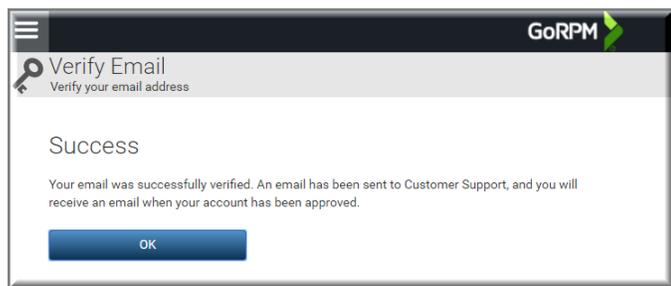


Upon clicking the link, you are directed to the GoRPM site and prompted to answer one of your security questions, as shown. Answer the question, and click **SUBMIT**.

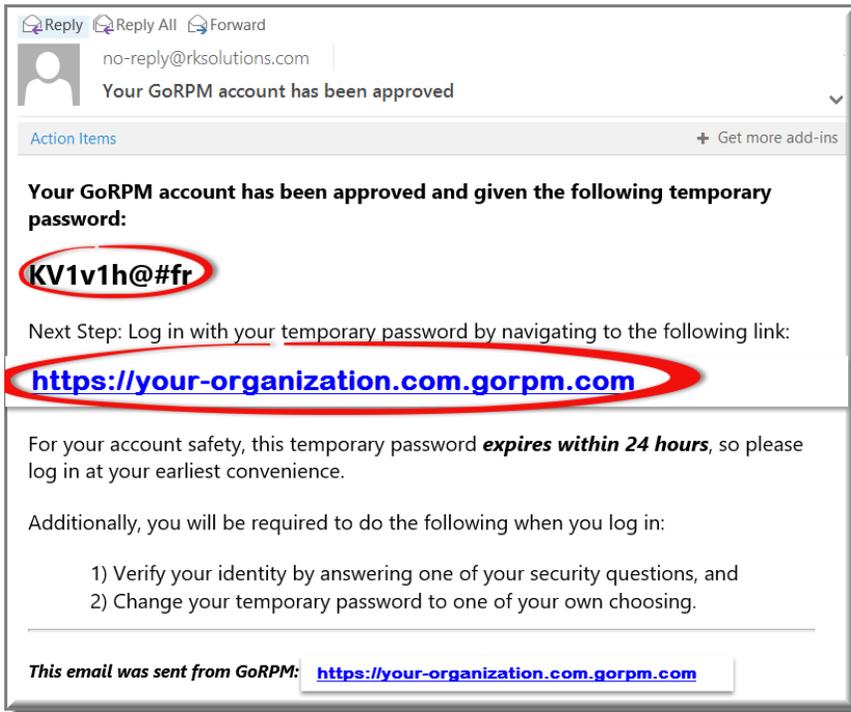


Upon successfully answering the security question, your email account is verified, and a **Success** message appears, as shown.

An email is sent to the User Manager or Customer Support to approve your account.



Upon approval, you receive an email such as the one below. Follow the instructions in the email regarding logging in with your temporary password.



Note: The password expires within 24 hours.

Sign in with your temporary password within 24 hours. When you sign in, you will be required to:

- Verify your identity by answering one of your security questions.
- Change your temporary password to one of your own choosing.

2.1.2 Using Active Directory Federation Services (ADFS)

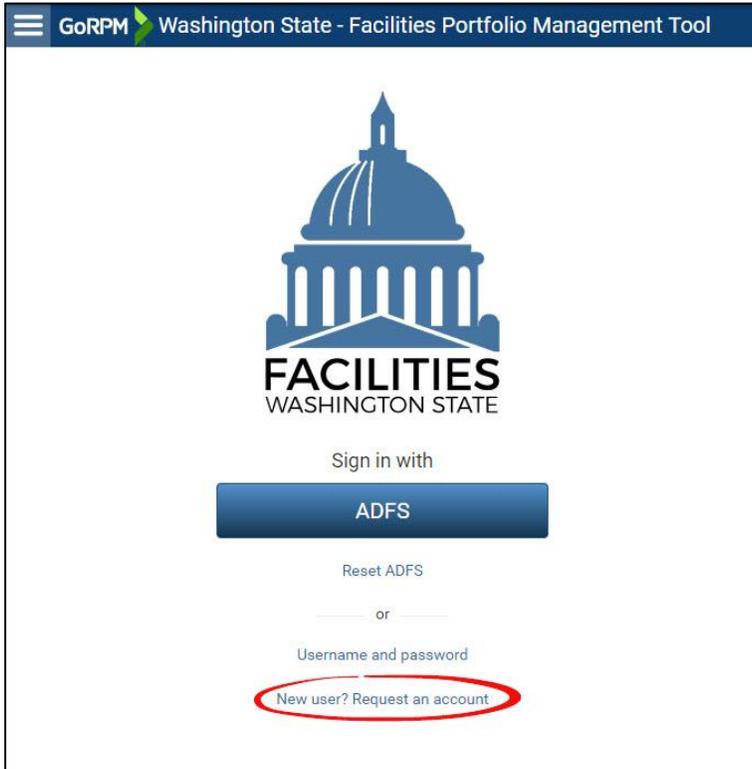
Active Directory Federation Services (ADFS) is a Single Sign-On (SSO) solution created by Microsoft. ADFS allows single sign on access to systems and applications across the state.

Only users with State Global Network (SGN) Active Directory accounts synchronized to Microsoft's Azure cloud platform can utilize this option.

Note: Contact your IT department to determine if your user account meets this criteria

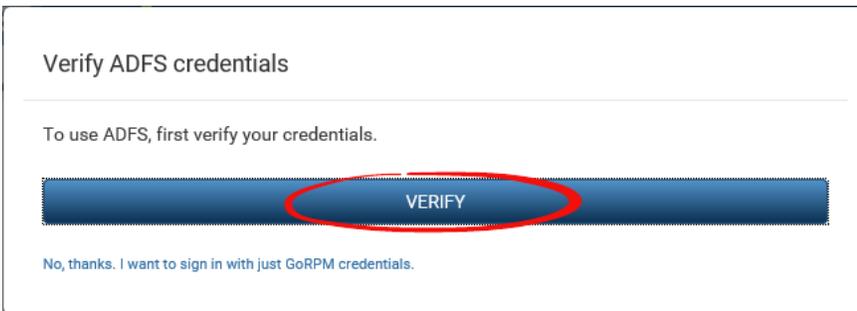
Go to <https://fpmt.gorpm.com>.

The **Sign In** screen appears, as shown below.



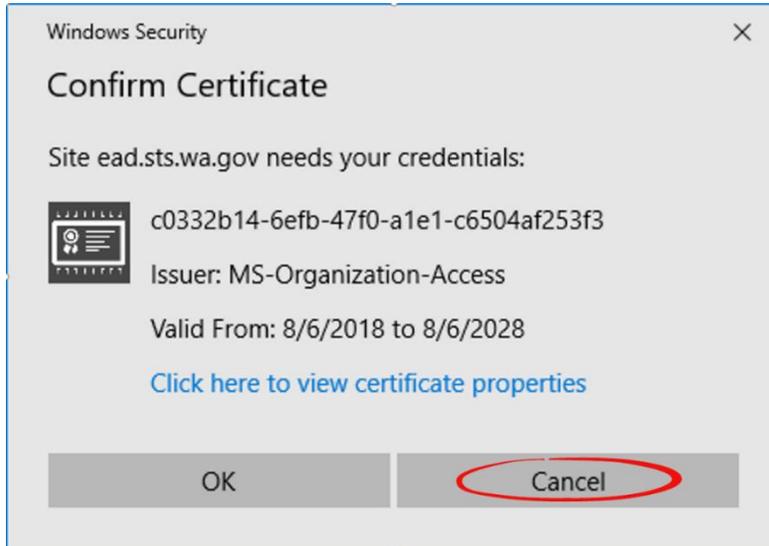
Click the **New user? Request an account** hyperlink.

The **Verify ADFS credentials** popup window appears.

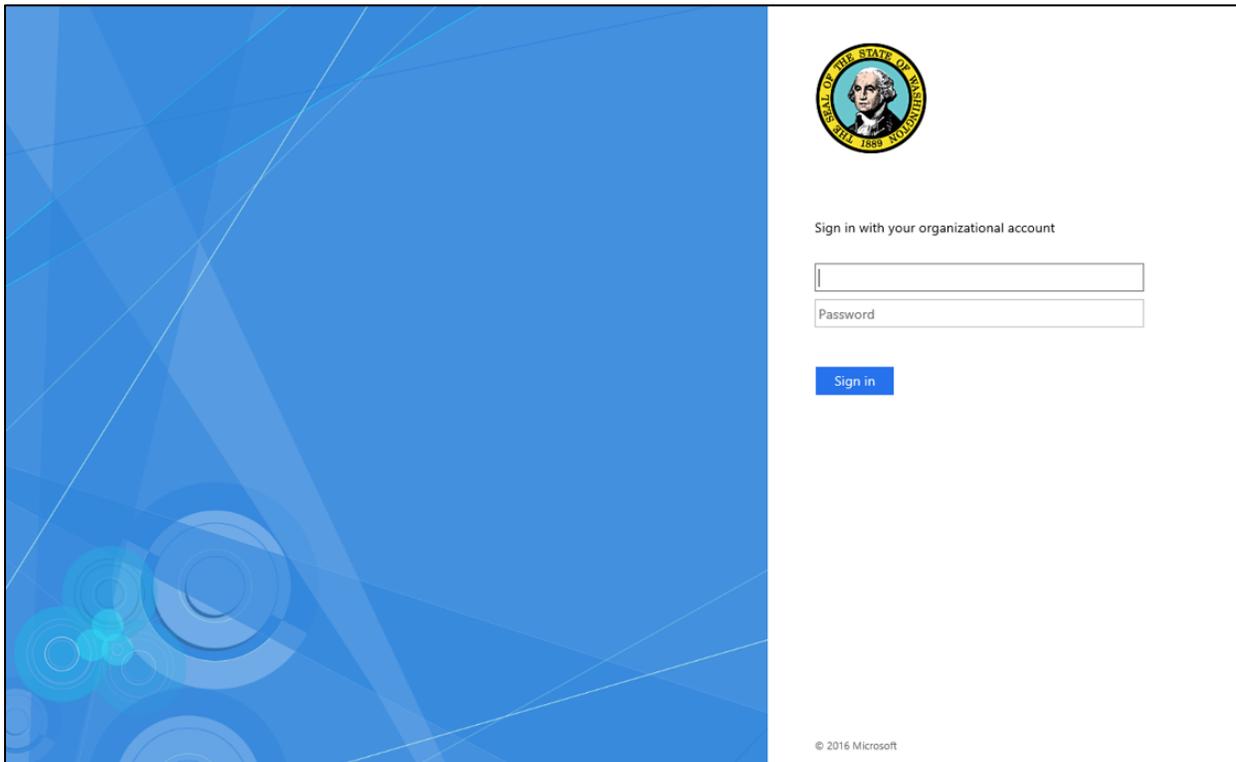


Click **Verify**.

Note: Depending on your browser configuration you may be prompted to choose a **Digital Certificate**. Click **Cancel** to proceed.



You will be redirected to the **State of Washington ADFS** page



Enter your state of Washington **Username** and **Password**, click **Sign in** button to complete the verification. This is the **Username** and **Password** you use to log into your state computer.

The **Request an Account** screen appears with the **ADFS: Verified** message.

The screenshot shows a web form titled "Request an Account" for GoRPM. At the top, there is a green banner indicating "ADFS: Verified" with a checkmark icon. Below the banner, the form includes the following sections:

- Email:** Two input fields for "Email" and "Confirm email".
- Sign-in Option:** A checkbox labeled "Also use GoRPM credentials to sign in".
- My Information:** Four input fields for "First name", "Last name", "Phone", and "Title".
- Security Questions:** Three sets of fields, each consisting of a "Security question" dropdown menu, an "Answer" input field, and a "Confirm Answer" input field.
- Buttons:** A blue "SUBMIT" button and a "Cancel" link at the bottom of the form.

Enter your email address, user information, security questions and answers. For added security, security questions are required to set or reset your password. Be sure to remember your answers.

If you want to have **GoRPM credentials** as well, check the **Also use GoRPM credentials to sign in** check box under the **Confirm email** text box.

Request an Account
Request a user account

ADFS: Verified

Email

Confirm email

Also use GoRPM credentials to sign in

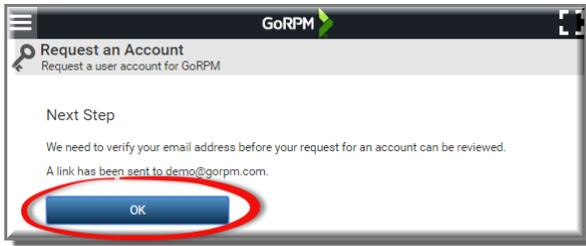
My Information

Note: Leading and trailing whitespaces in answers get trimmed, and answers are not case sensitive.

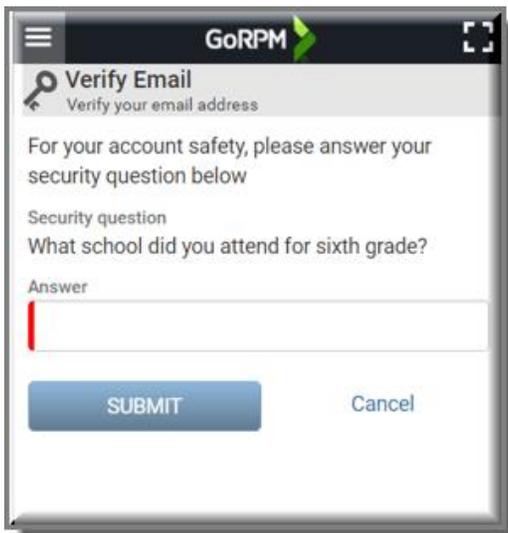
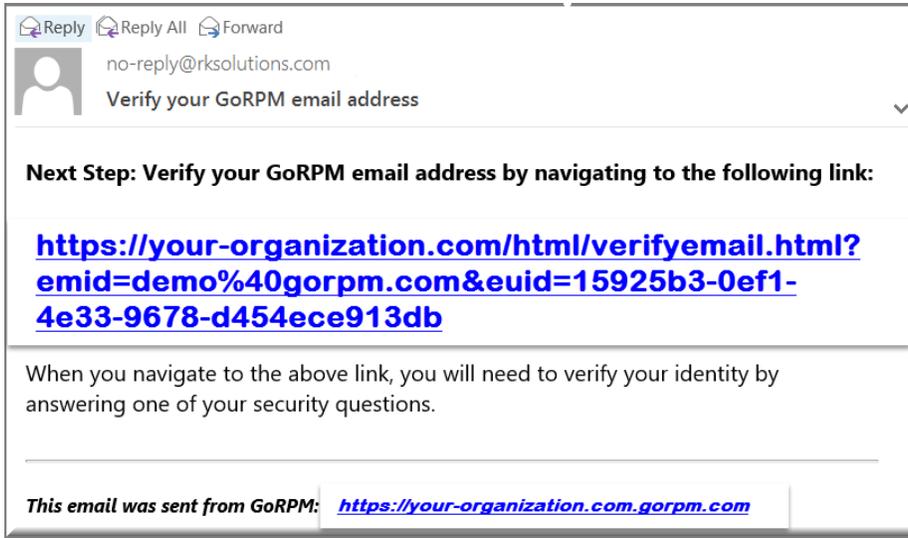
After entering all required information, as shown, click **Submit**.

The screenshot shows the 'Request an Account' page in the GoRPM system. At the top, there is a header with the GoRPM logo and a navigation menu. Below the header, the page title is 'Request an Account' with a sub-header 'Request a user account for GoRPM'. A green banner indicates 'ADFS: Verified'. The form contains several input fields: 'Email' (demo@gorpm.com), 'Confirm email' (demo@gorpm.com), and a checkbox for 'Also use GoRPM credentials to sign in'. The 'My Information' section includes fields for 'First name' (Demo), 'Last name' (User), 'Phone' (540-343-7300), and 'Title' (Technical Writer). The 'Security Questions' section has three questions, each with an answer and a confirm answer field. The first question is 'What was your high school mascot?' with answer 'Eagle'. The second is 'What street did you live on in third grade?' with answer 'Main'. The third is 'In what city or town was your first job?' with answer 'Roanoke'. At the bottom, there is a blue 'SUBMIT' button circled in red and a 'Cancel' link.

A **Next Step** screen appears, as shown, notifying you of your email address verification. Click **OK**.



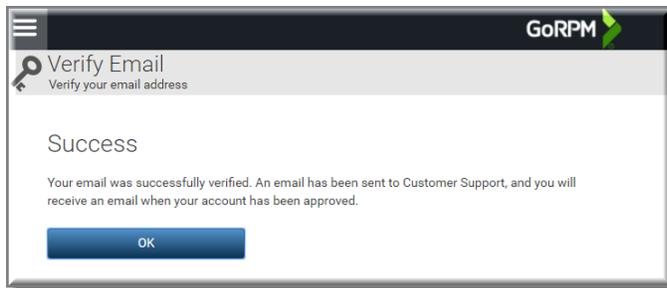
Check your email inbox for a verification message, as shown below. Click the link in the email.



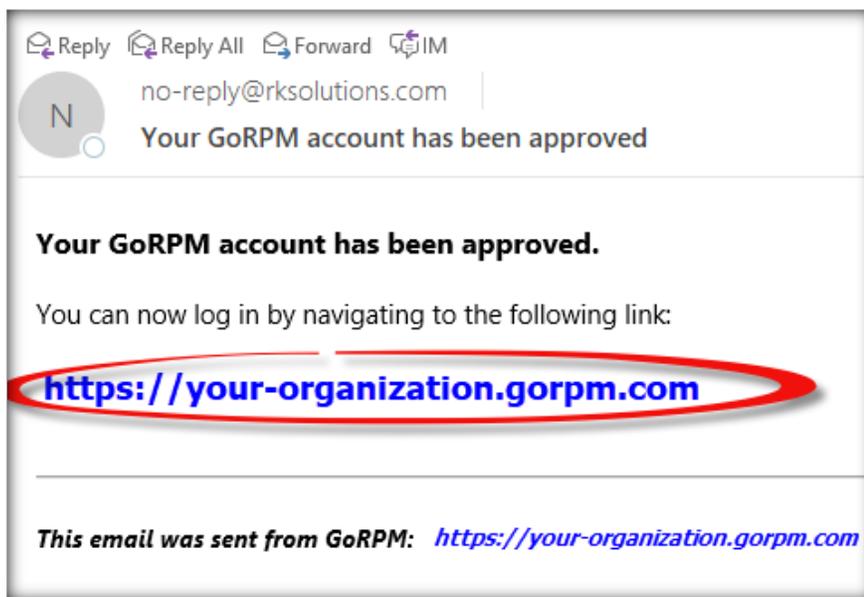
Upon clicking the link, you are directed to the GoRPM site and prompted to answer one of your security questions, as shown. Answer the question and click **SUBMIT**.

Upon successfully answering the security question, your email account is verified, and a **Success** message appears, as shown.

An email is sent to the User Manager or Customer Support to approve your account.



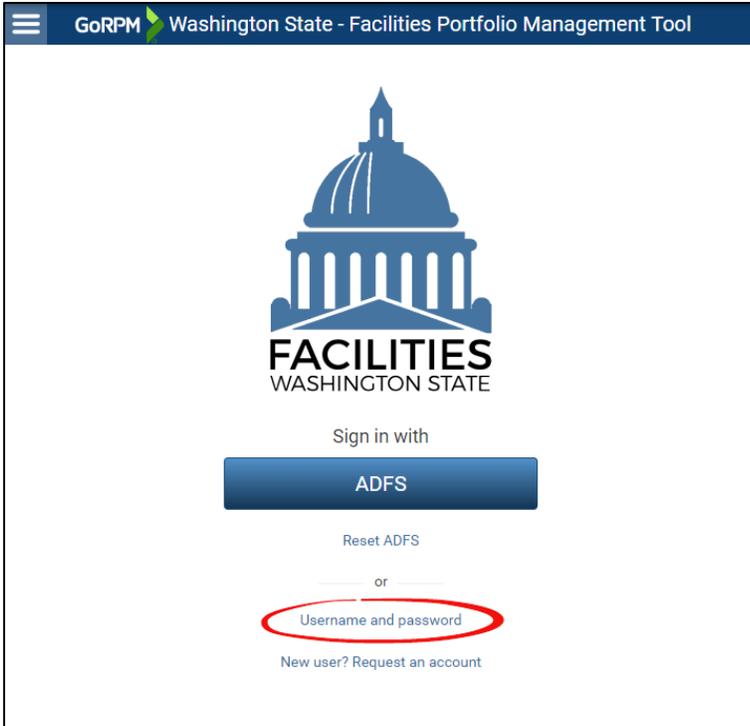
Upon approval, you receive an email such as the one below. You can click on the link to sign in to GoRPM using the **ADFS** button



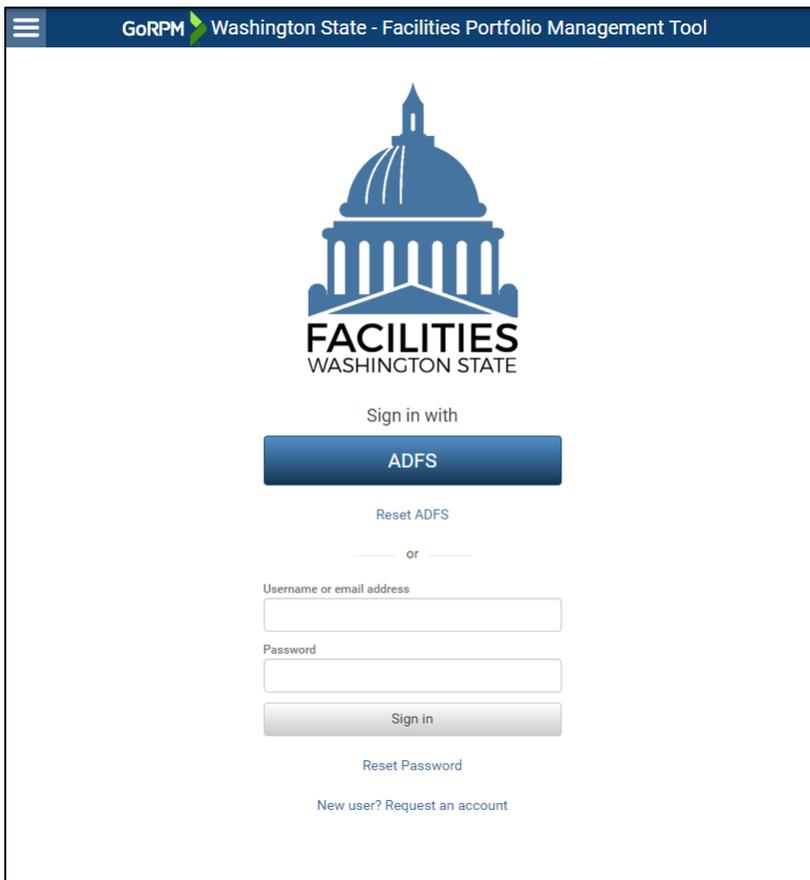
2.1.3 Configuring an existing FPMT user account to use ADFS Authentication

Go to <https://fpmt.gorpm.com>.

The **Sign In** screen appears, as shown below.



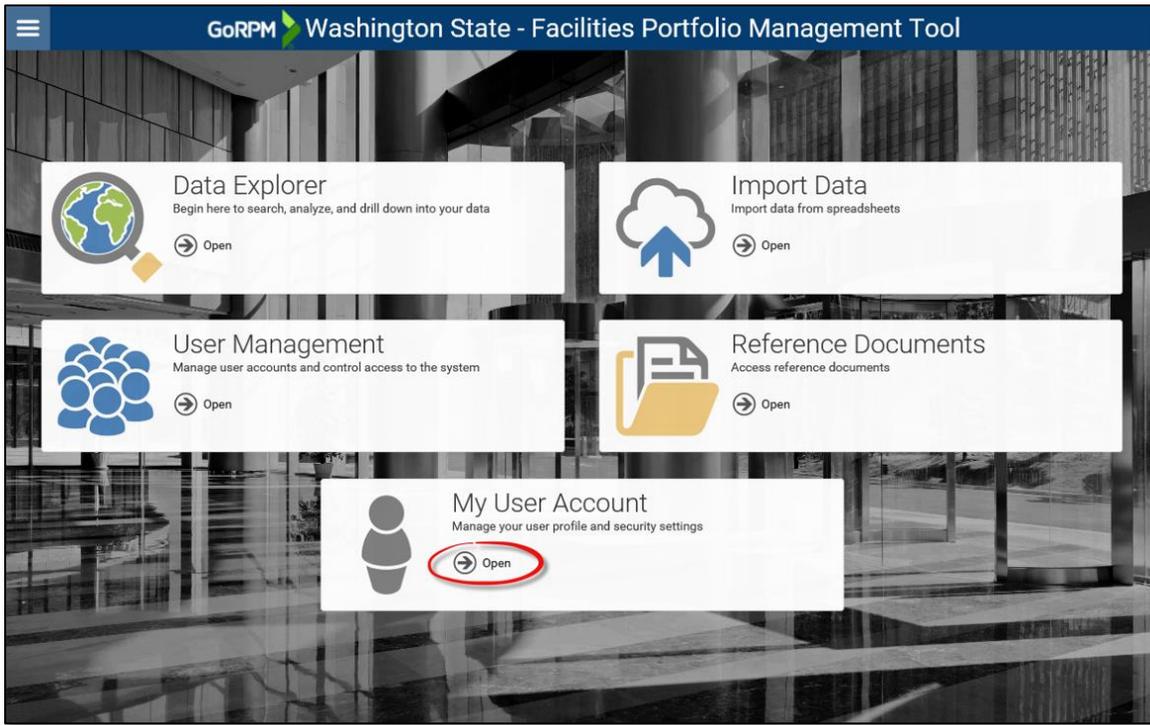
Click the **Username and password** hyperlink.



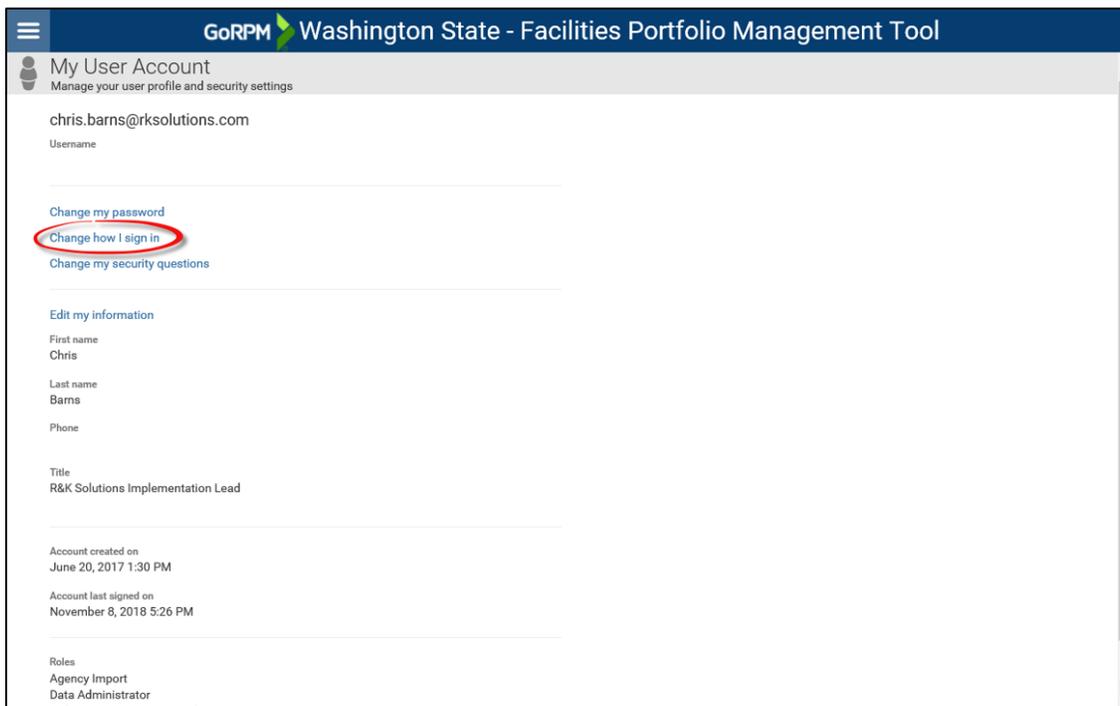
Enter your **Username or email address** and **Password**.

Click the **Sign In** button.

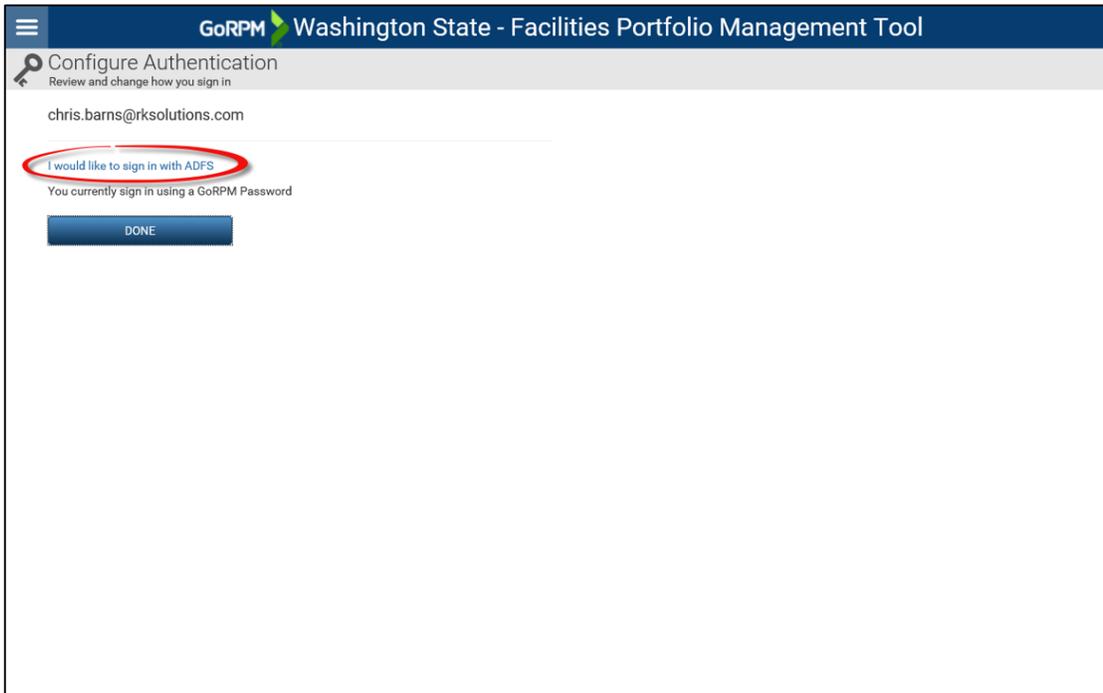
The **Home** page will appear. Click **Open** on the **My User Account** tile.



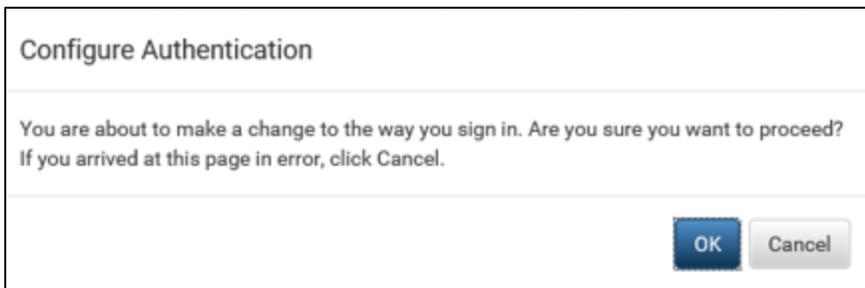
On the **My User Account** page click on the **Change how I sign in**.



On the **Configure Authentication** page, click on **I would like to sign in with ADFS**.

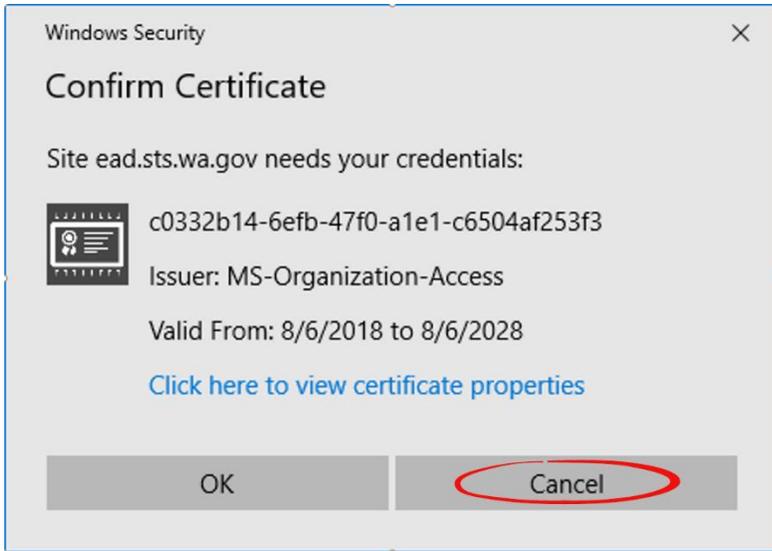


The system will prompt you to verify that you want to change the way you log in in the window that opens. (In the verification window that appears)



Click **OK** if you are ready to configure ADFS SSO or click **Cancel** to stop configuring ADFS SSO at this time.

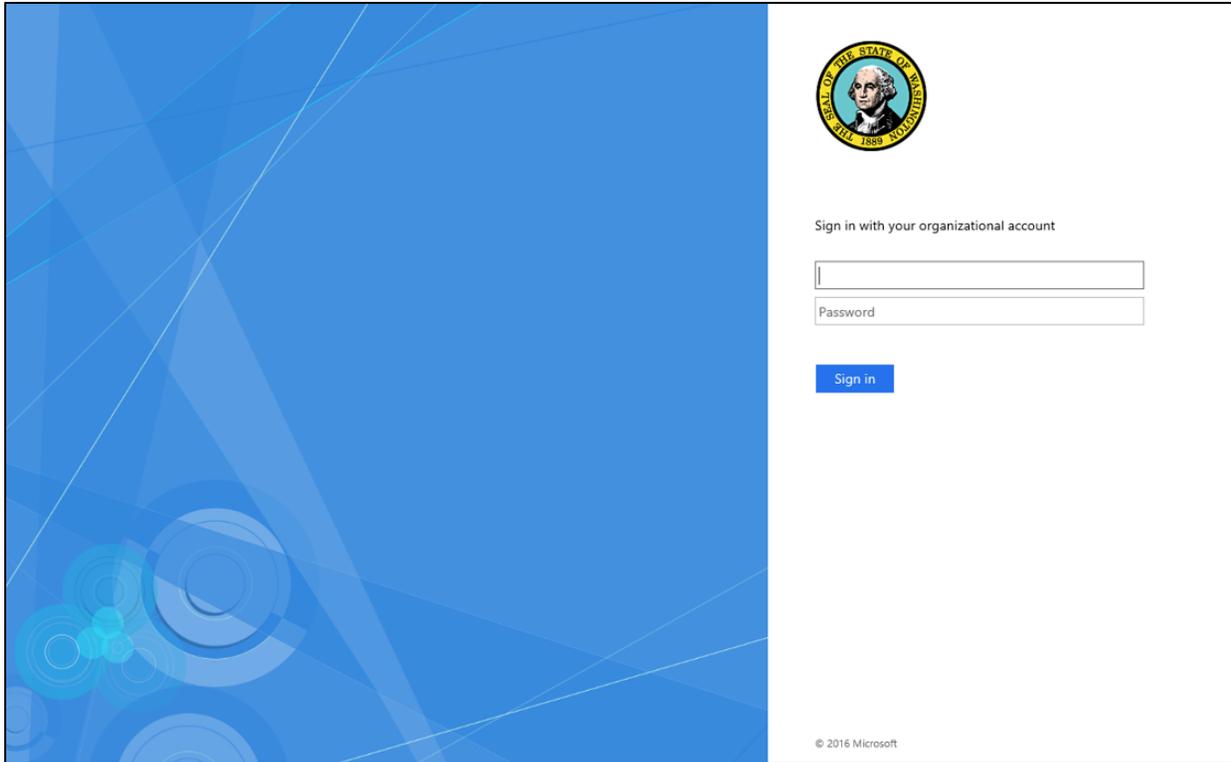
Note: Depending on your browser configuration you may be prompted to choose a **Digital Certificate**. Click **Cancel** to proceed.



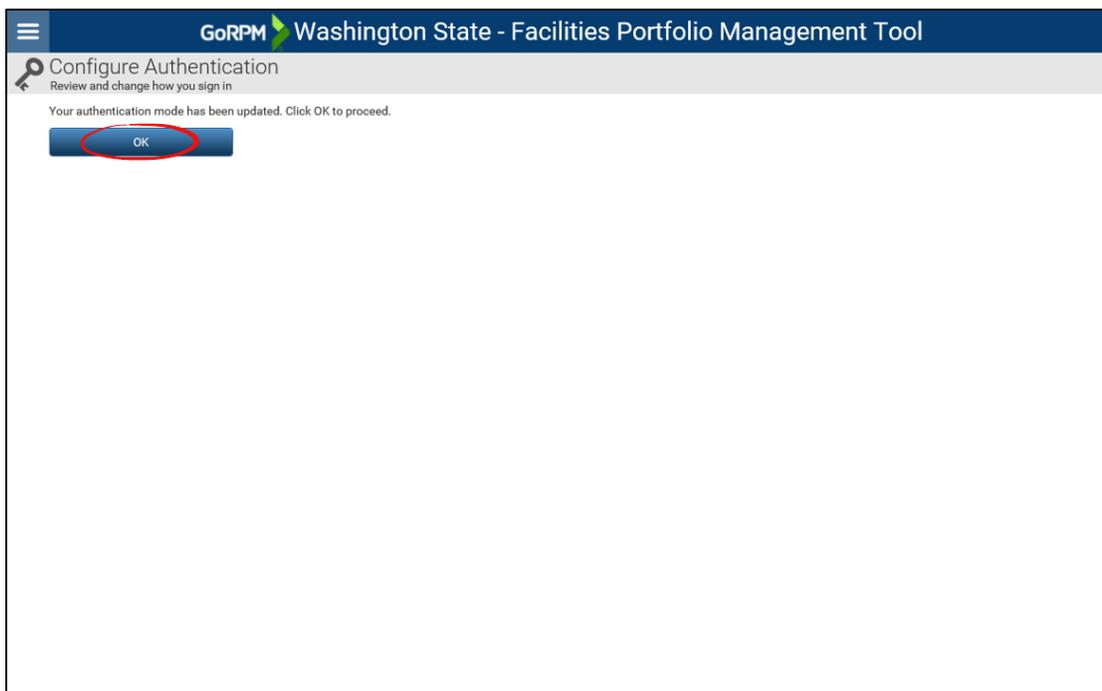
Note: The next step is only applicable when users have not already logged in to their state of Washington (ADFS) account.

The browser will redirect you to the state's ADFS web page - <https://ead.sts.wa.gov/adfs>.

Enter your state of Washington **Username** and **Password** to verify your state's (ADFS) account.

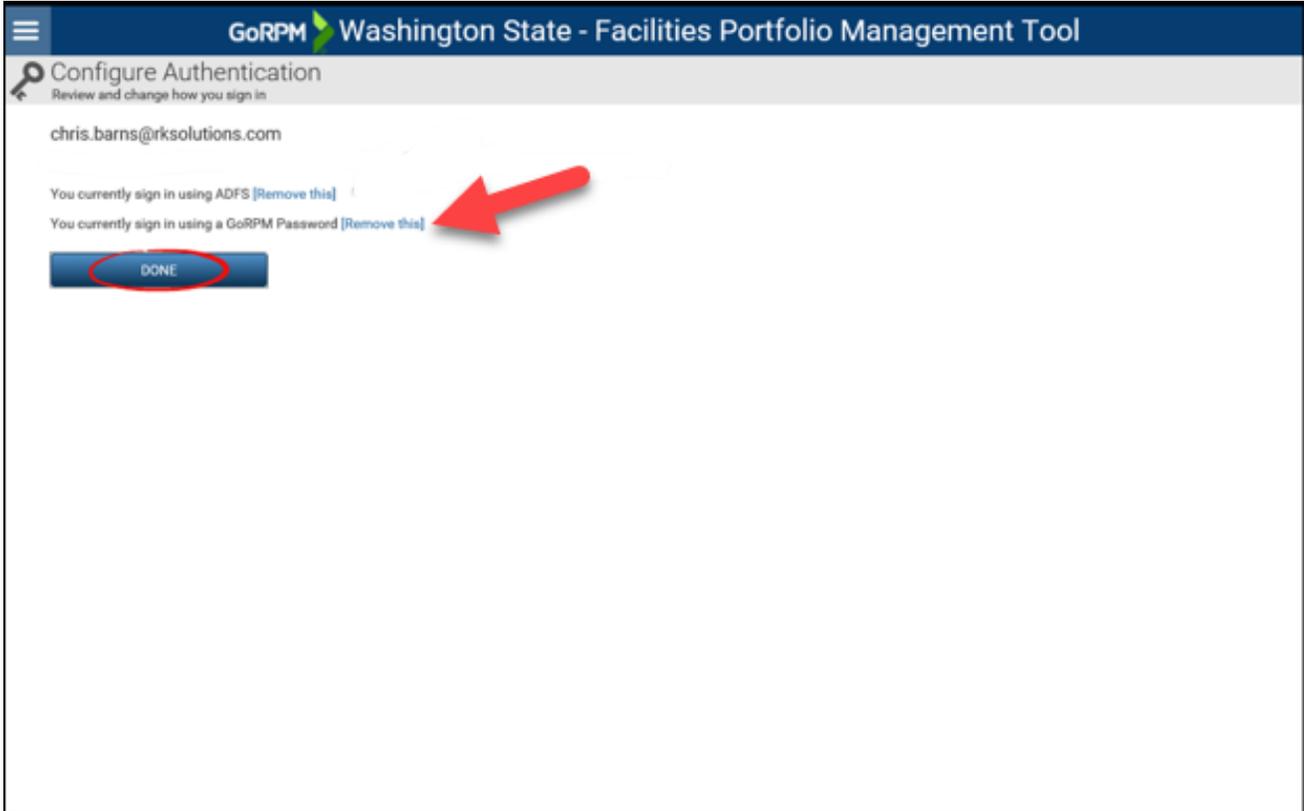


Once your state's (ADFS) account has been verified the Configure Authentication window will open. Click **OK**.



The last step in the authentication configuration process provides a summary of the configured authentication methods for your FPMT account.

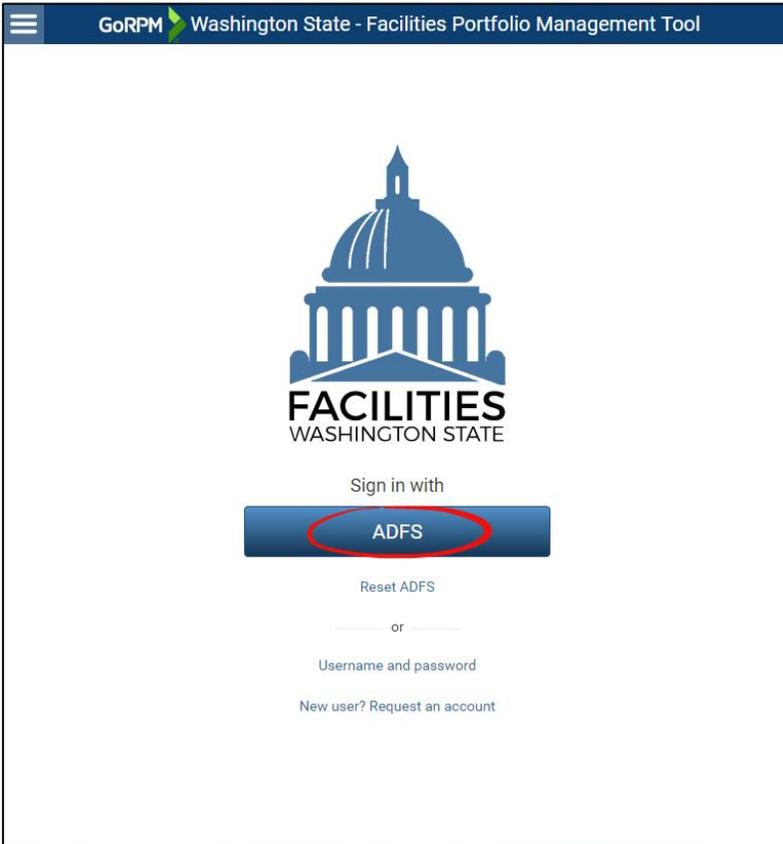
You can choose to only use ADFS authentication for your FPMT account by clicking the **Remove this** link to the right of **You currently sign in using a GoRPM Password**



2.1.4 Configuring an existing FPMT ADFS user account to use GoRPM Authentication (User name and password)

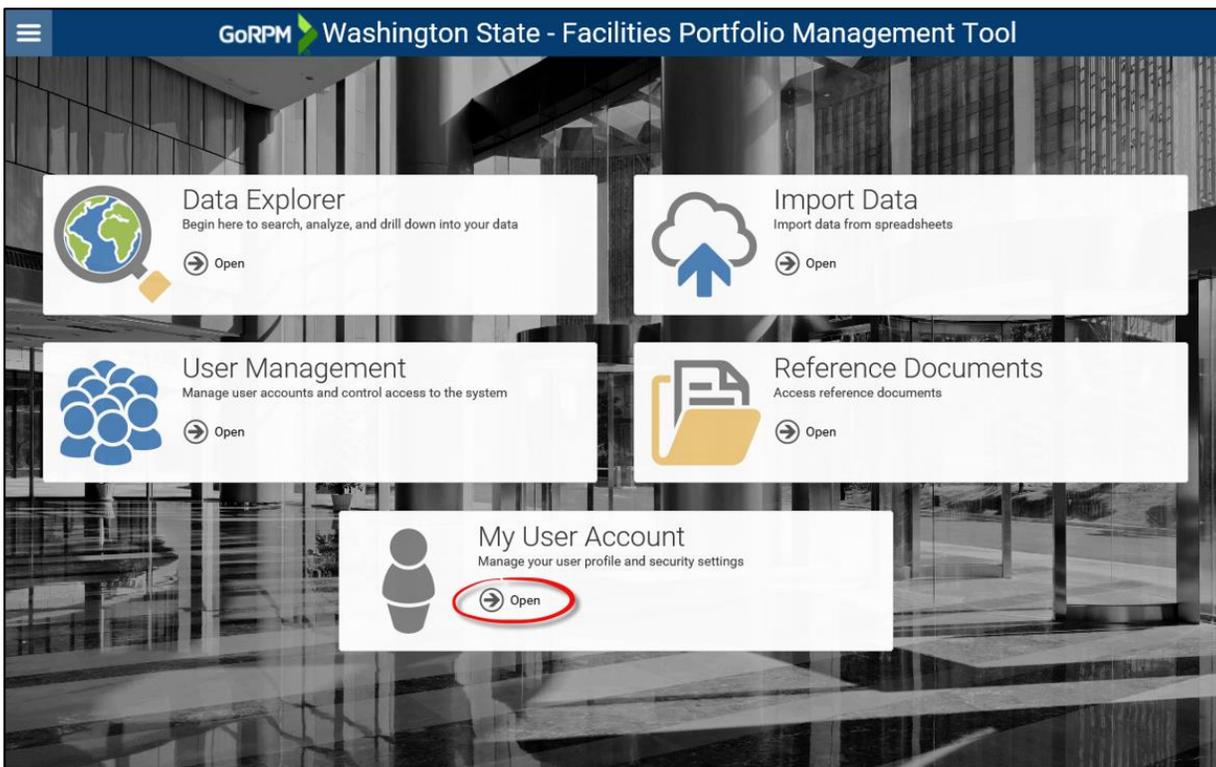
Go to <https://fpmt.gorpm.com>.

The **Sign In** screen appears, as shown below.



Click the **ADFS** button.

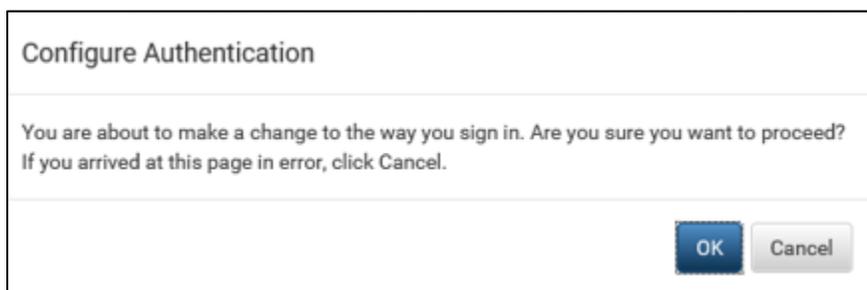
The **Home** page will appear. Click **Open** on the **My User Account** tile.



On the **My User Account** page click on the **Change how I sign in**.

On the **Configure Authentication** page click on **I would like to sign in using GoRPM username and password**.

The system will prompt you to verify that you want to change the way you log in in the window that opens. (In the verification window that appears)



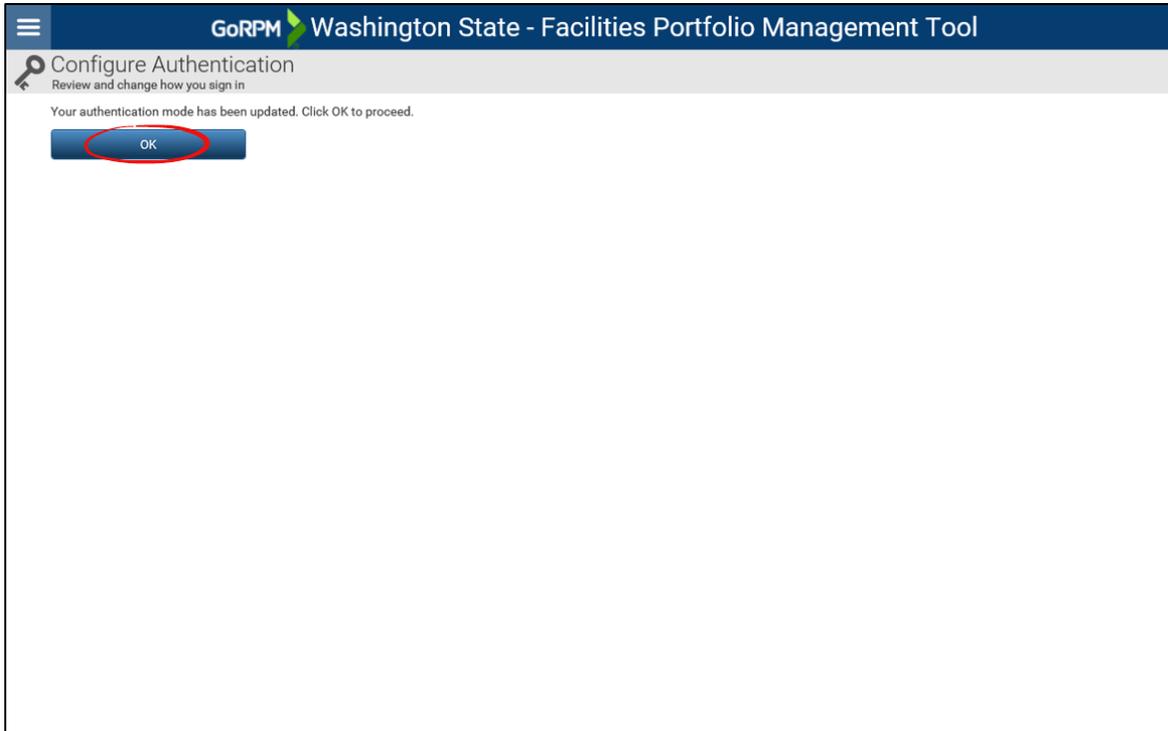
Click **OK** if you are ready to configure GoRPM authentication or click **Cancel** to stop configuring GoRPM authentication at this time. Upon approval, you receive an email such as the one below. Follow the instructions in the email regarding logging in with your temporary password.

Note: The password expires within 24 hours.

Sign in with your temporary password within 24 hours. When you sign in, you will be required to:

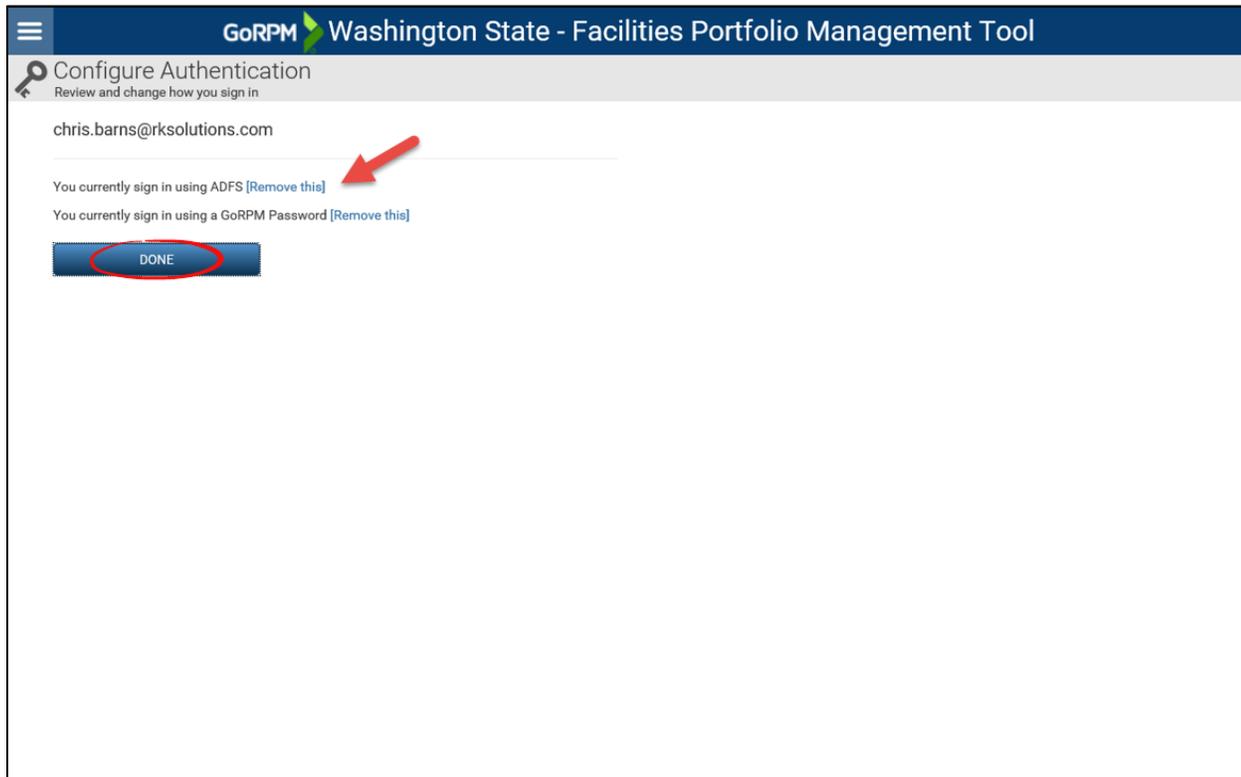
- Verify your identity by answering one of your security questions.
- Change your temporary password to one of your own choosing.

Once your state's (ADFS) account has been verified the Configure Authentication window will open. Click **OK**.



The last step in the authentication configuration process provides a summary of the configured authentication methods for your FPMT account.

You can choose to only use GoRMP username and password authentication for your FPMT account by clicking the **Remove this** link to the right of **You currently sign in using ADFS**.



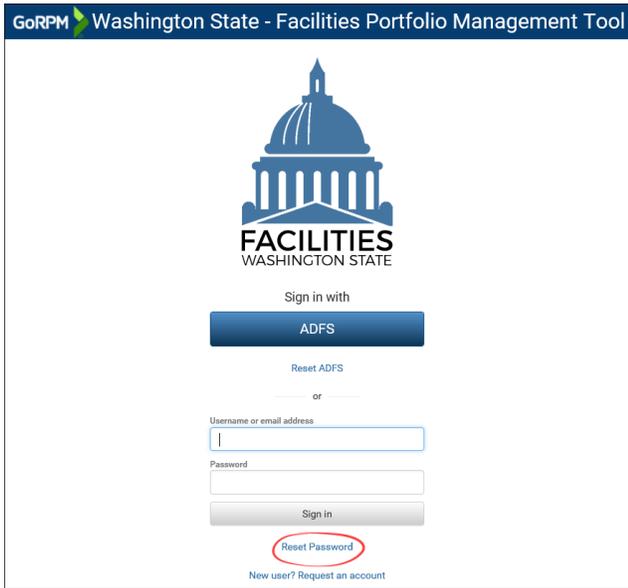
2.2 Reset Your Password

If you forget your password, or want to change it, you may request a new one.

Go to your organization's website.

Note: Resetting a password and changing a password have the same effect, but a reset is an administrative action. As opposed to a password change, it doesn't require knowledge of the old password. If you need to change your password, see [Section 4.1.1](#), Change Your Password.

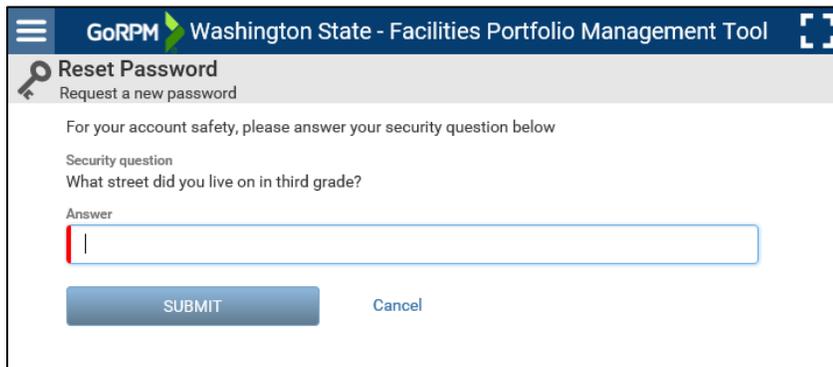
On the **Sign in** screen, click the **Reset Password** hyperlink.



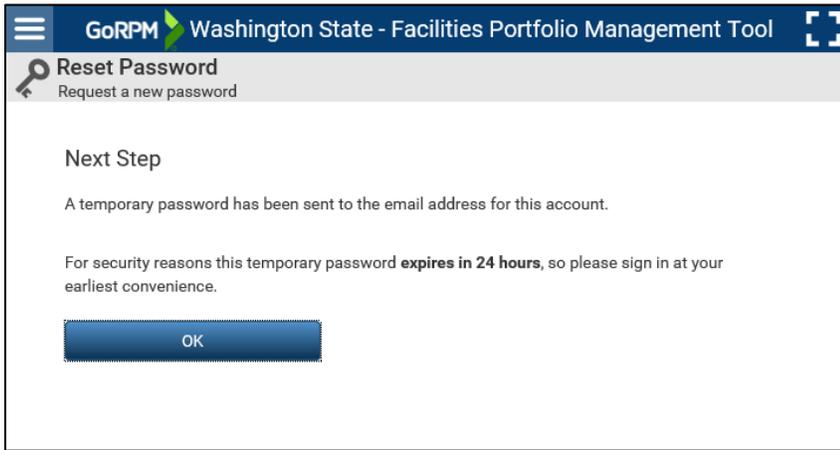
The **Reset Password** screen appears, as shown. Enter your email address and click **SUBMIT**.



The **Reset Password – Security Question** screen appears. Enter your answer and click **SUBMIT**.

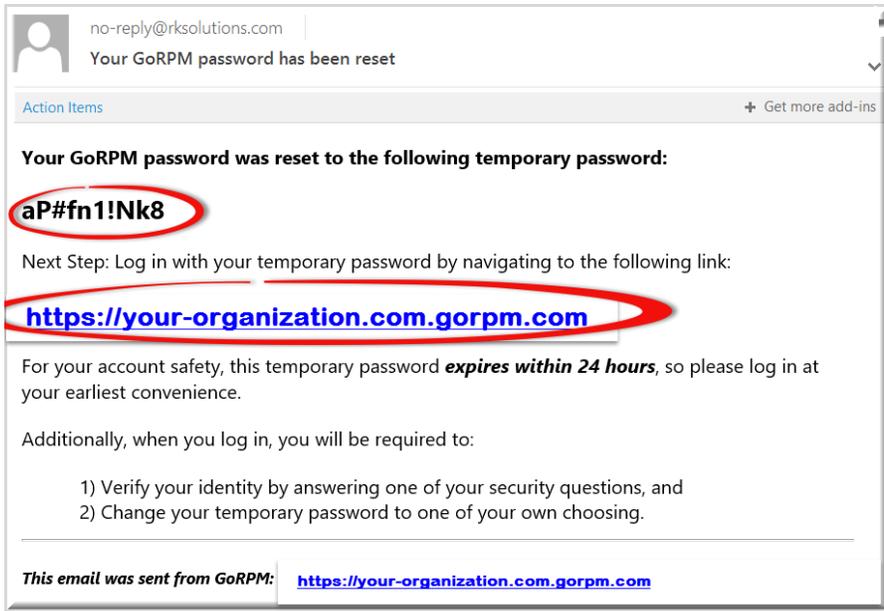


The **Reset Password – Next Step** screen appears. Click **OK**.



Check your inbox for an email, such as the one below, confirming your password reset and providing a temporary password.

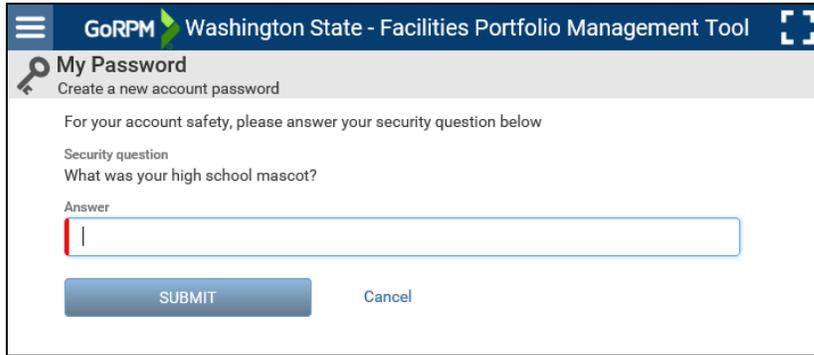
Note: The password expires within 24 hours.



Follow the instructions in the email regarding logging in with your temporary password.

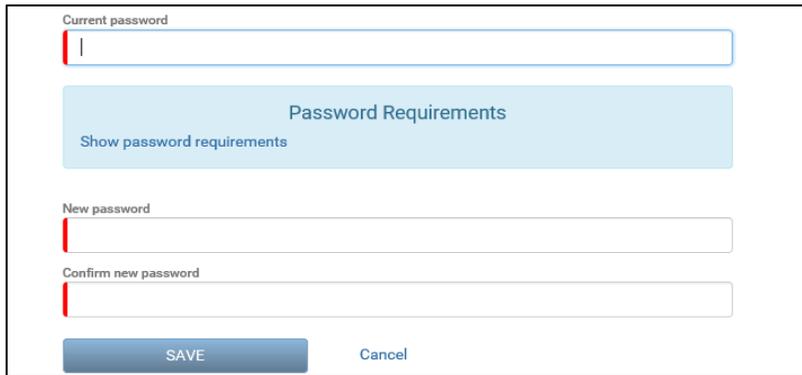
Sign in with your temporary password within 24 hours. When you sign in, you will be required to:

- Verify your identity by answering one of your security questions.



The screenshot shows a web interface for 'GoRPM Washington State - Facilities Portfolio Management Tool'. The page title is 'My Password' with a sub-header 'Create a new account password'. A message states: 'For your account safety, please answer your security question below'. The security question is 'What was your high school mascot?'. Below the question is an 'Answer' input field with a red vertical bar on the left. At the bottom are 'SUBMIT' and 'Cancel' buttons.

- Change your temporary password to one of your own choosing.



The screenshot shows a password change form. It has three input fields: 'Current password', 'New password', and 'Confirm new password', each with a red vertical bar on the left. Between the 'Current password' and 'New password' fields is a light blue box titled 'Password Requirements' with a 'Show password requirements' link. At the bottom are 'SAVE' and 'Cancel' buttons.

2.3 User Roles

A variety of users roles have been established for FPMT. The user role and a brief summary of permissions are listed below:

Agency Administrator: This role can create and edit data assigned to the agency. This role cannot delete facility records, but can delete child tables such as Space, Owned or Leased Facility. Agencies should only have 1-2 administrators.

Agency Editor: This role can create and edit data assigned to your agency. This role cannot upload or import data, or delete records.

Agency Importer: This role can import data into the system. This role will be assigned only to agencies who have been approved to import data consistent with the established policy.

OFM Facilities Administrator: This role can access all data for all agencies, assign new users and reset passwords. This is the only user role that can edit SAAM data, City, County and Legislative District.

OFM Facilities Oversight: This role can read and edit all data for all agencies. OFM staff who have been assigned this role will assist agencies in reporting where needed.

Read Only: This role can read data and reports for all agencies, but is has no edit capabilities. This is the default role for the system that will be assigned to you when you request access to the system.

2.3.1 Requesting an Enhanced Role

Per OFM Facilities' [Data Integrity and System Access Policy](#), all new users will be assigned Read Only permissions.

Elevated permissions can be requested through fpmtsupport@ofm.wa.gov after the new user has an approved read-only account.

3. Basic Concepts and Nomenclature

3.1 Home Screen

Upon logging in, the “landing” page is the **Home** screen. The **Home** screen, as shown below, has modules. The modules for your implementation may be different, but typical modules include: **Data Explorer**, **User Management** (will only appear for User Managers), **Import Data** (will only appear for Importers-not shown below), **Reference Documents** and **My User Account**.



The modules are permissions driven; the number and names of tiles you see depend on what your Administrator grants you permission to access.

3.1.1 The Header Bar

The **Header Bar** at the top of the screen displays a **Menu** button, a logo, and a **Maximize** button, as shown below.

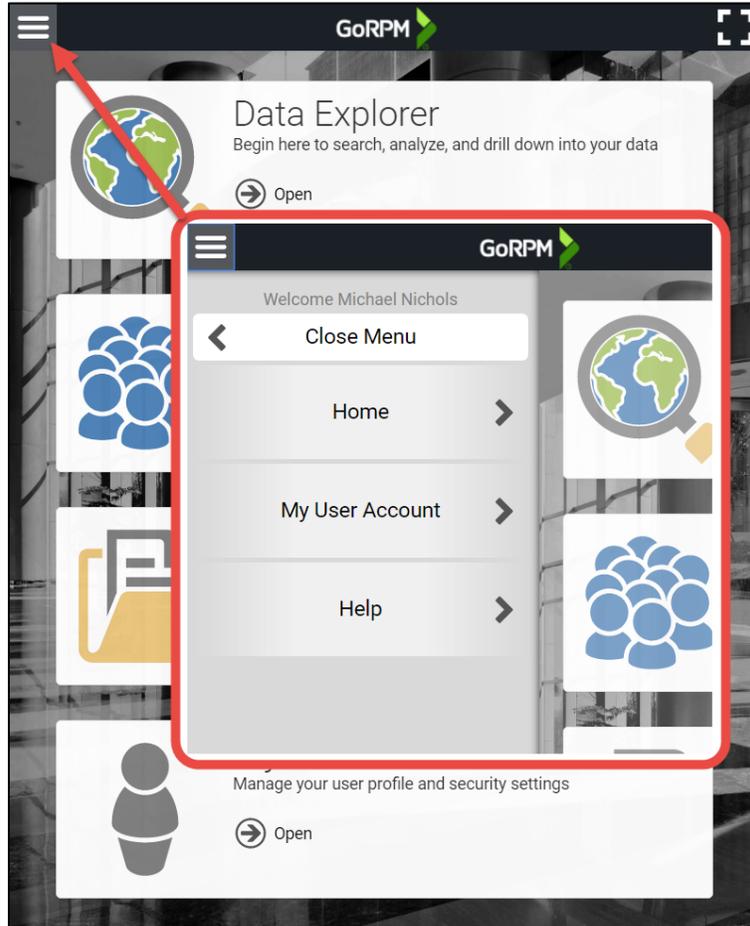


3.1.2 Full Screen Mode

The **Maximize** button allows you to enter **Full Screen** mode, hiding all elements other than the main browser window itself. In **Full Screen** mode, the **Maximize** button is replaced by  the **Minimize** button. Press the **Esc** key on your keyboard to exit the full screen.

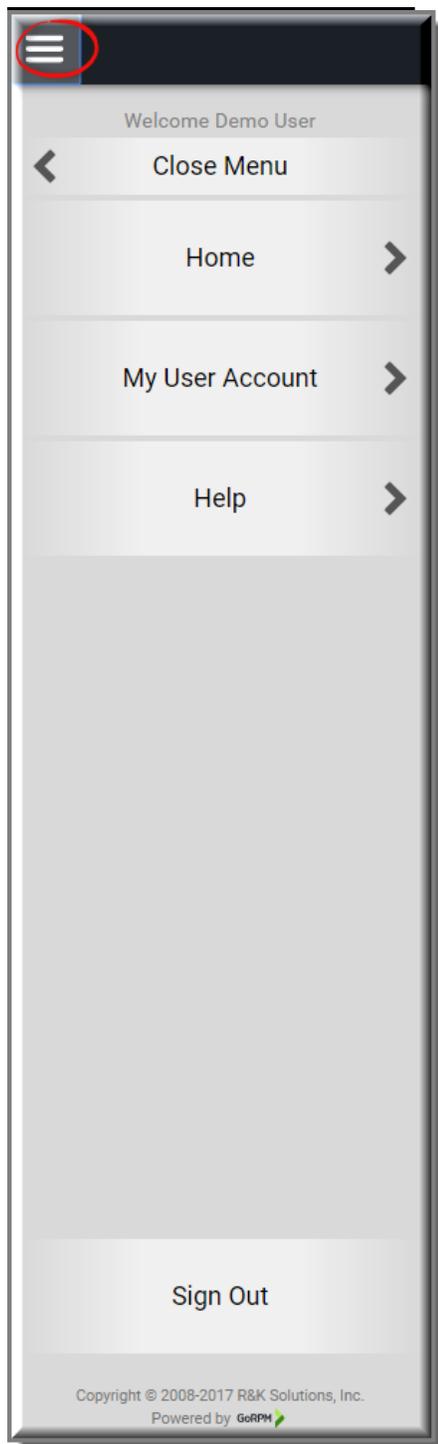
3.2 Menus

GoRPM is menu driven. Menus are accessed via the **Menu** buttons, sometimes referred to as “hamburger” menus or three-line menus.



3.2.1 The Home Menu

Selecting the **Menu** button from the **Header Bar** reveals a list of options:



Close Menu closes the menu bar so you can view and browse the page displayed on the right in full.

Home directs you back to the **Home** screen.

My User Account directs you to a page where you can manage your user profile and security settings.

Help directs you to information on the GoRPM system.

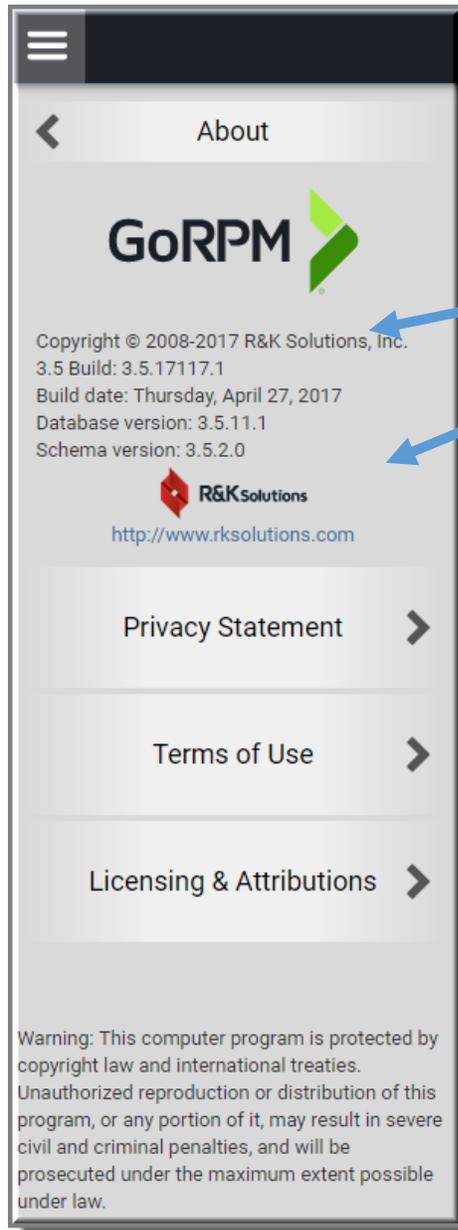
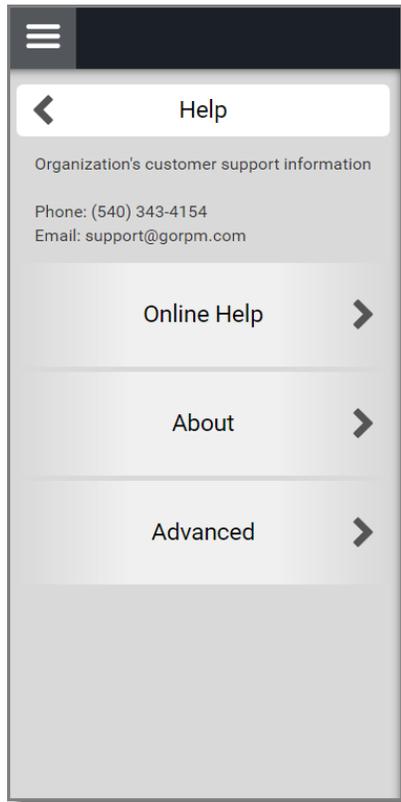
Sign Out signs you out of the GoRPM application. A confirmation of sign out is given, as shown below. You will need to sign in the next time you use the software.



Note: The system signs you out automatically after 15 minutes as required by OCIO Policy. If you are automatically signed out due to inactivity, the system will automatically return you to the location you were in the system when you log back in.

Online Help is not currently set up.

Click **Help > About** to view basic information on the GoRPM system, as shown below.



Click **About** to return to the GoRPM **Help** menu.

System build date

Link to the R&K Solutions website

Click to display the **Privacy Statement**

Click to display the GoRPM **Terms of Use** and End User Agreement

Click to display the **Licensing & Attributions** the GoRPM system uses

3.3 Geospatial and Non-Geospatial Data

GoRPM provides many ways to search, analyze and navigate through your data. Data can be geospatial (geographic positioning information included within it) and non-geospatial (not related to a location on the surface of the earth). Geospatial data is displayed in GoRPM maps in the form of a point, line or polygon, and is referred to as “geometries.”

3.4 Entities

An entity is a distinct and independent object that may be described by attributes or properties. Examples of entities are:

- A facility
- A county
- A city
- A space
- A legislative district
- An agency
- A leased facility
- An owned facility
- A lease contract

Entities appear in the **Tile List** and in the **Map**, where data or images describing the characteristics of the entity and its geographic location, if available, are visible.

An association between entities is known as a relationship or link. Upon selecting an entity, you have the option to add new related entities, edit entity attributes, edit relationship attributes, delete entities, or delete entity relationships depending on your permissions.

3.4.1 Fixed Entity Properties

Certain properties exist for all entities. For example, Names, Descriptions and Icons.

3.4.1.1 Name and Description

All entities have a Name (e.g., Washington) and Description (e.g., State).

3.4.1.2 Entity Icons

The **Entity icons** are alpha-numeric based on the first letter(s) of the entity title. Entity icons appear in multiple places throughout the system.

3.4.1.3 System Generated Entity Icons

A system generated **Entity icon** is a colored circle with up to three characters of text, based on the entity definition name. An example is shown below.



3.4.1.4 Attributes

An attribute is a characteristic, feature or property of an entity, containing information about the Entity. An attribute can be alphanumeric data, numeric data, Boolean (a binary variable such as true/false or yes/no), a date, a domain (a set of choices, such as a picklist). Example attributes include:

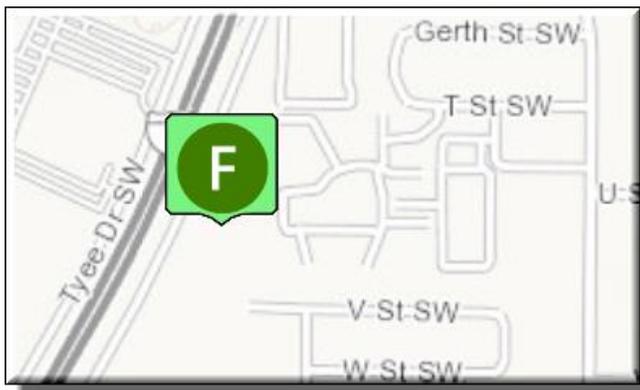
- Function
- Size
- Parts
- Who uses it
- When it is used
- Street address
- Text
- Square footage

GoRPM uses the following attribute values to describe an entity:

- Boolean
- Date
- Domain
- Decimal
- Integer
- Unique ID
- Text

3.4.1.5 Geometries

Some Entities have geographic information such as a point (e.g., a dot on the map for a city), line (e.g., a road), or polygon (e.g., the shape of a state). The center point of a graphic representation (e.g., name, number or icon) of an entity named F is shown below. This representation of the entity on the map is the **Entity** icon.



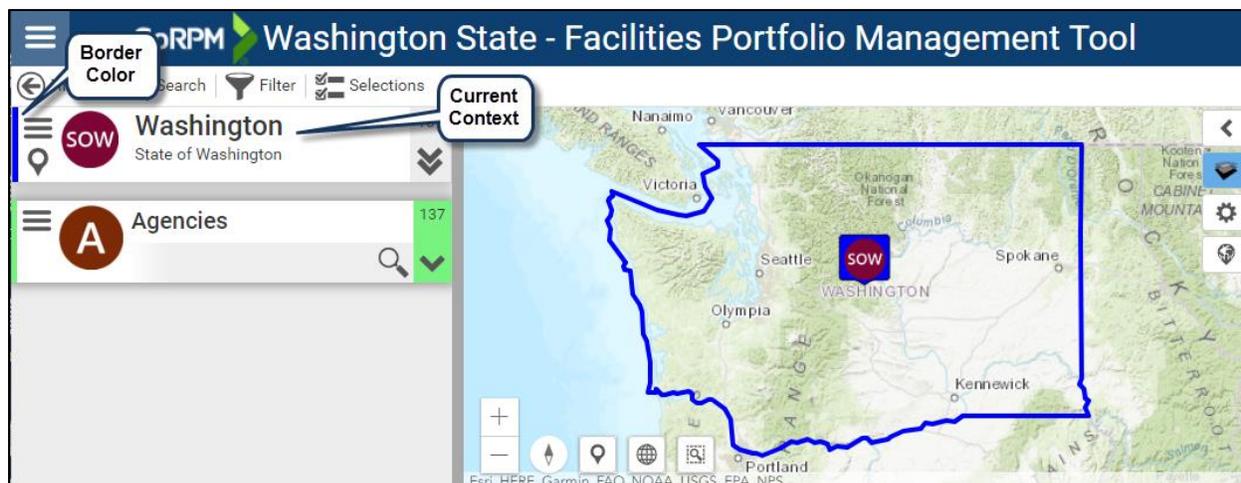
If an entity only has a point for a geometry, then the icon is located where the point is.

If an entity has a shape, the icon appears to the calculated center of the shape. For example, for an entity such as the state of Washington, the icon appears in the calculated center of the state, as shown below.



The color of geometries always matches the border of the entities displayed in the **Tile list**.

As shown, when the entity is the current context, the geometry is highlighted in blue on the map (the current entity is always blue).



3.5 Badges and Cluster Icons

3.5.1 Badges

GoRPM uses badges as a representation for an entity attribute field value.

In other words, a badge is designed to represent a rule associated with an attribute. A badge icon can be a picture of most anything. Using badges is a simple and efficient way to view a set of data. For example, if a condition assessment was done on a group of buildings, data entered, and business models run, there would be an overall condition value for each building. Seeing color coded badges representing building condition when navigating through a large amount of data, in **Map View** or in **Data Explorer**, makes it easy to prioritize and target buildings in need of repair, versus buildings that are in good shape.

3.5.2 Badge Sets

A **Badge Set** is a set of user defined icons that correspond to values for the attribute field.

For example, to show whether a room has audio/visual capabilities, the following badge set with a yes or no value could be used:



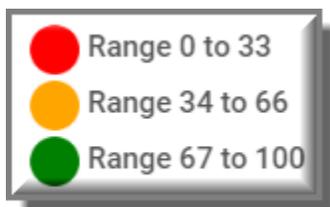
Note: The FPMT is not currently configured to include badge sets, but this function will likely be added in the near future.

The icon that corresponds to the value of the attribute is displayed in the application (on the map or on a **Data Menu** page) where the entity exists.

3.5.3 Badge Sets with Ranges

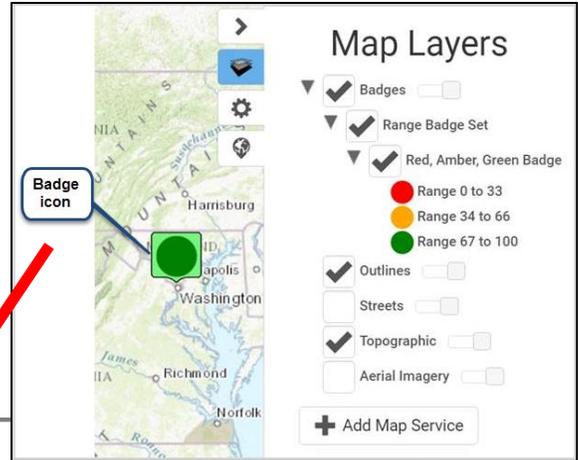
Badges may also be used with ranges. For example, you might want to have a Health badge to serve as the first high-level indicator of issues that require your attention. Other examples of Badge ranges include Workload, Time Remaining, and Risk.

GoRPM offers configurable badges (the System Administrator sets the Badge range thresholds). An example of a configured badge range is shown below. Each colored icon is associated with a value range. Badges have been configured with the colors red, amber and green, representing specific numerical ranges.



Badges can be visualized in **Map View**, as explained in detail later in this guide. The **Badge icon** in the map shown is a green circle inside a square. On the map, the icon always appears within a Callout bubble.

Upon clicking a **Badge icon** on the map, a **Data Menu** screen appears with information about the entity, as shown.





Level 1, Item 1
Level 1 Item

Badge associated with Attribute

Manage

- Select
- Open
- Add
- Edit
- Delete



Attribute with Badge Range 85





Level 1 Item Details

- Attribute Type Boolean
Yes
- Attribute Type Date
1/1/2017
- Attribute Type Decimal
3.14
- Attribute Type Integer
1,234,567,890
- Attribute Type Long
9,223,372,036,854,775,000
- Attribute Type Text
abc def ghi jkl mno pqrs tuv wxyz ABC DEF GHI JKL MNO PQRS TUV WXYZ
- Attribute Type Unique ID
f43c7842-682e-44d5-8e01-083b9108342d
- Attribute Type Domain Level 1
North America (NA) - Area: 24,490,000 km2
- Attribute Type Domain Level 2
United States (USA)
- Attribute Type Domain Level 3
Virginia (USA)
- Attribute with Badge Range
85

A yes / no question. Yes = value of the attribute. E.g. Room has audio = Yes

Numeric quantity or value with a decimal. E.g. dollar amounts, percentages

Numeric quantity or value with whole numbers. E.g. dollars, indexes, numbers, square footage

Same as above but larger integers

Descriptions, names, notes

Example of an integer type. Tied to a color coded badge set. E.g. if the value is 67 - 100, green

E.g. date a building was built, date a lease expires, date the next inspection is due

Computer defined. A global unique identifier (GUID) is a number that Microsoft programming generates to create a unique identity for an entity such as a Word document.

For Level 1, 2, and 3 Domains, a list of already defined values

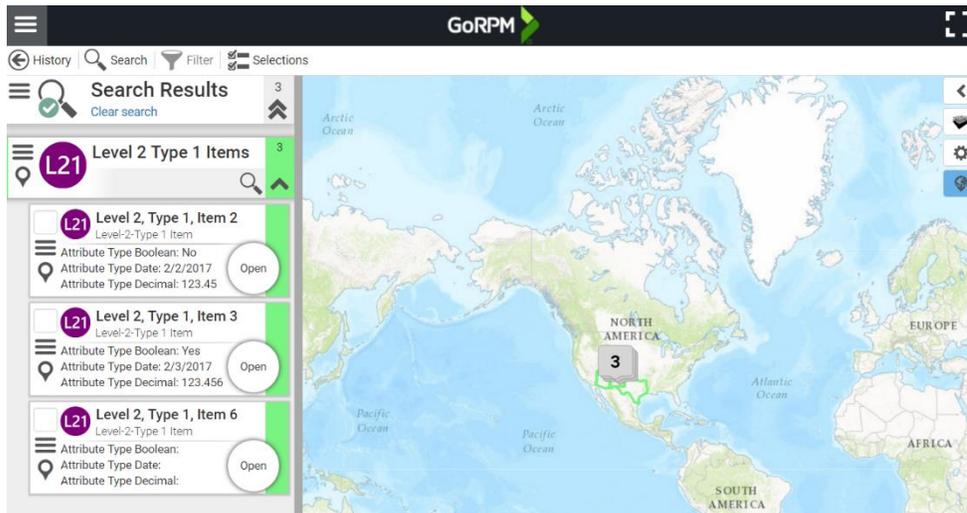
3.5.4 Cluster Icons

Sometimes individual badges are so close together that, from the current map view, they are indistinguishable as separate badge icons. If so, the badges are represented by a cluster icon.

A cluster icon is gray, with a number representing the number of individual badges, or a “cluster” of geometry. In the picture below, one cluster icon represents three individual badges, and the other represents two badges.

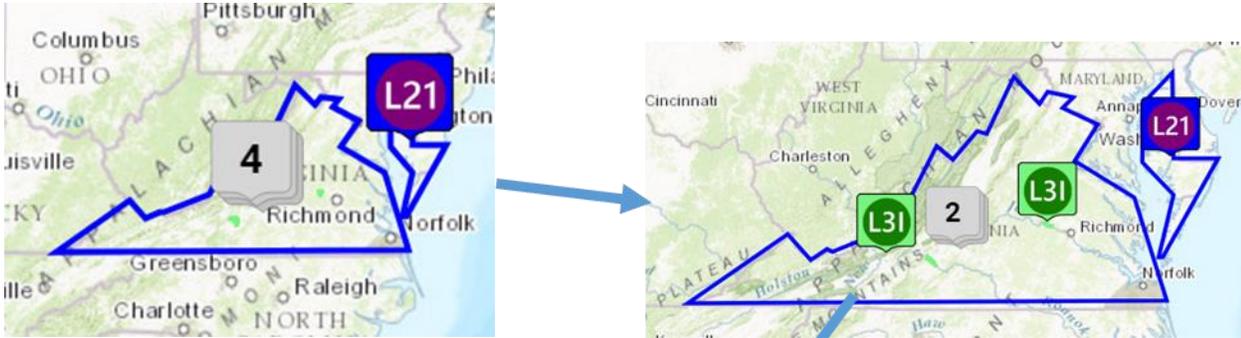


When you single click a cluster icon, whatever badges it represents are put in the search results. As shown below, **Search Results** are updated.

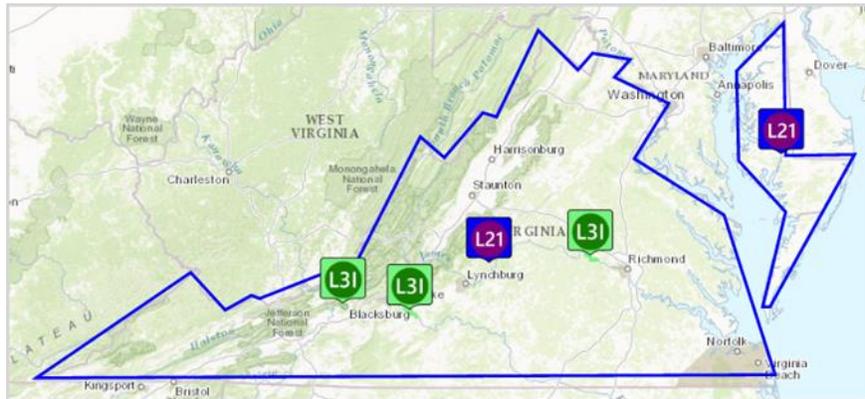


If you zoom in on a cluster icon, it splits into multiple icons.

Zoomed in one time:



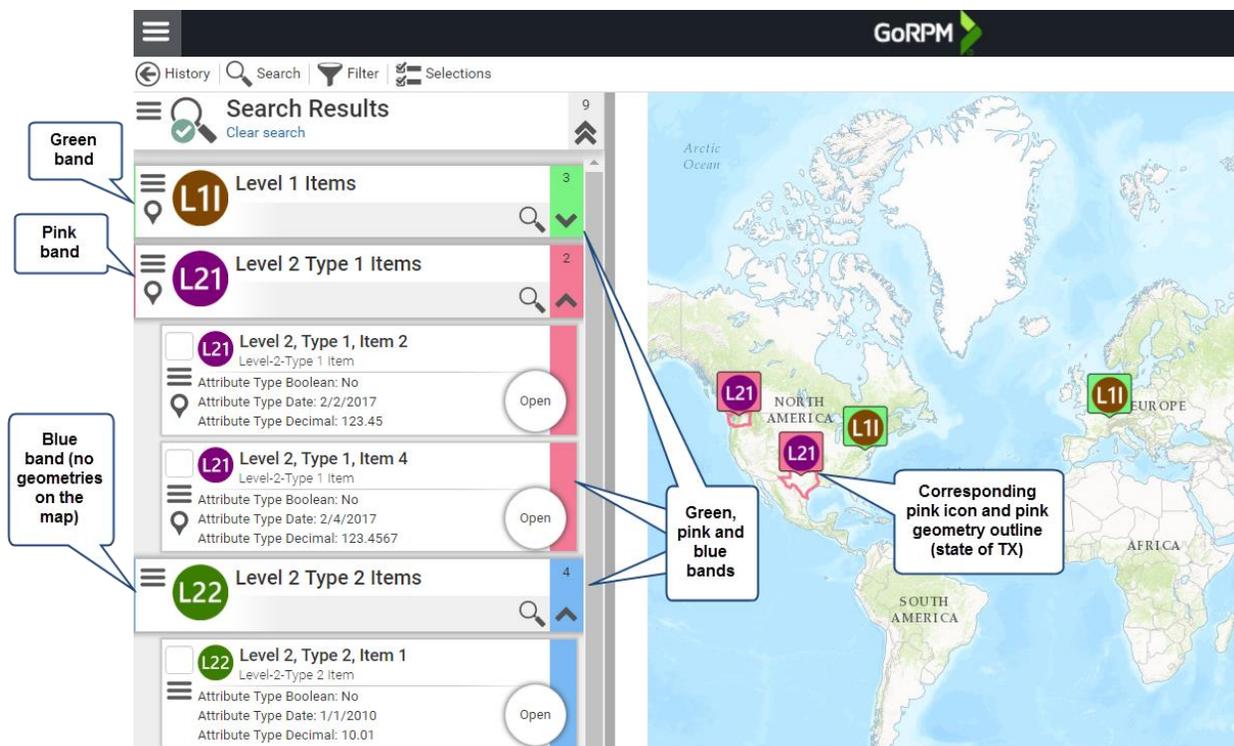
Zoomed in twice:



3.6 General Application Navigation

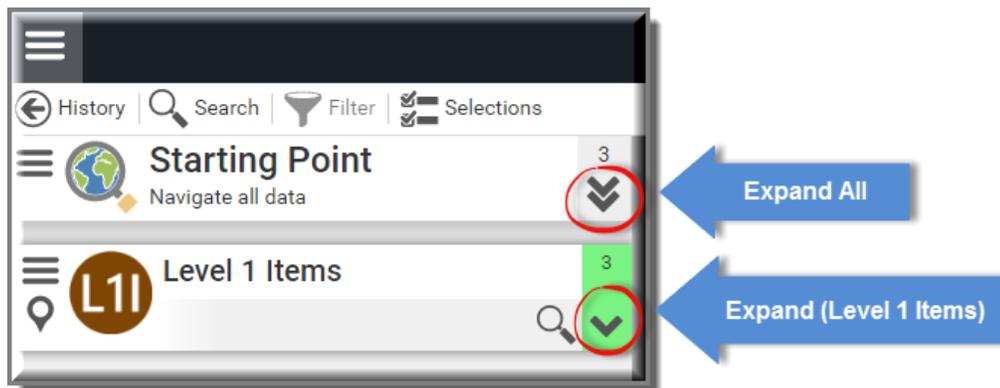
3.6.1 Color Coding

In the application, Tiles have a band of color on their edges that corresponds with the color of the icon Callout on the map, and also corresponds to the geometry or geometries outline associated with the Entity or Entities. An example of color coding is shown in the screen below.

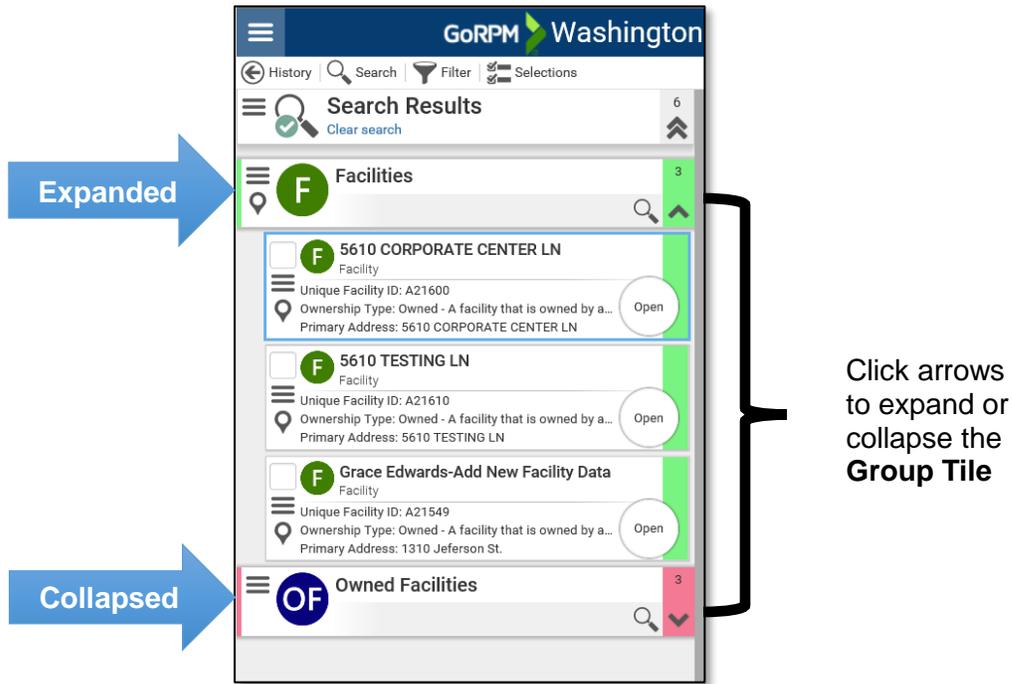


3.6.2 Expand and Collapse

The **Expand All** and **Expand** buttons, circled in red below, allow you to view all items associated with the entity.



Upon clicking the **Expand All** button, all entities associated with the **Group Tile** are displayed, as shown.



The **Collapse All**  and **Collapse**  buttons replace **Expand All** and **Expand** when the **Tile List** is expanded, so that you may hide the data detail from view.

3.6.3 Make a Menu Disappear

Throughout the application, you may exit a menu by clicking anywhere on the screen, other than the menu itself.

3.6.4 Field Context-sensitive Help

Click the **Information** icon to obtain additional information relative to the task you may perform in the system.



Information Icon

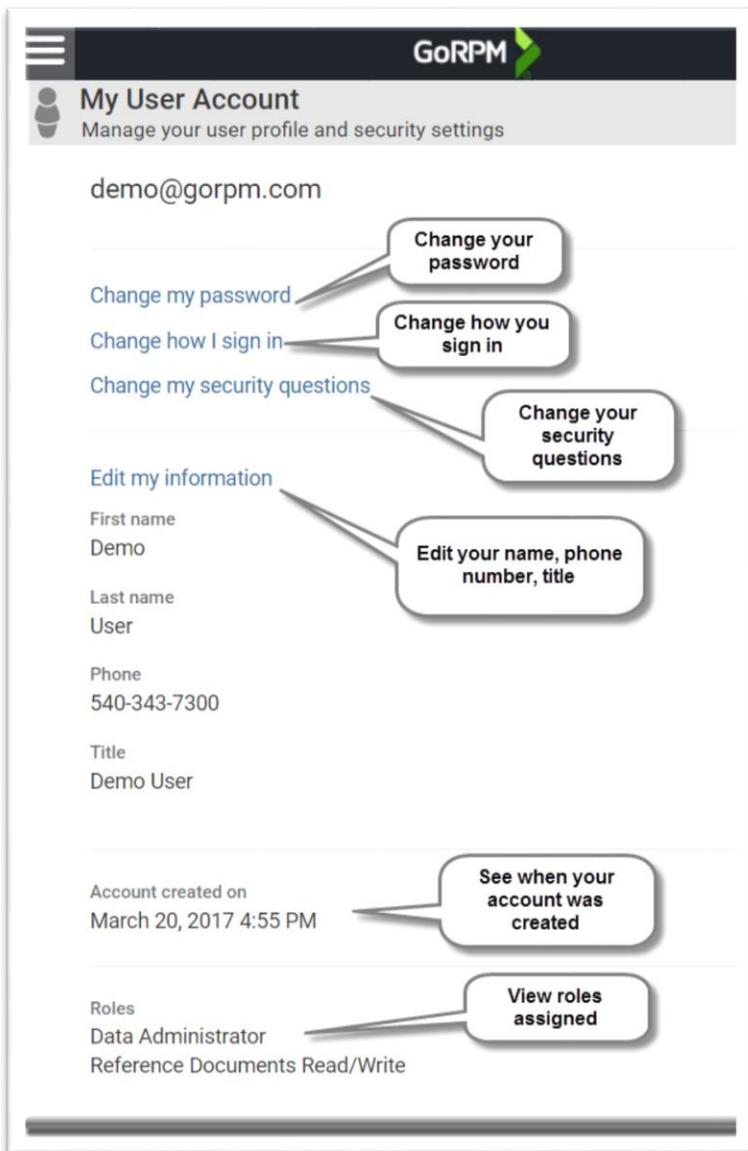
Ready, Set, GoRPM!

Now that you have a basic understanding of navigation and terms, it's time to dive in and learn more about the specifics of using GoRPM.

4. My User Account

My User Account allows you to manage your user profile and security settings.

On the **Home** screen, click the **Open** button on the **My User Account** tile. The **My User Account** page appears, as shown.



4.1.1 Change Your Password

GoRPM offers self-service password reset. From the **My User Account** page, click the **Change my password** hyperlink. The **My Password** screen appears. Type your current password, new password, and confirmation of your new password. Password requirements are shown below. The **Save** button becomes active upon correct completion of required information. Click **Save**.

The System Administrator configures the password requirements.

Note: *Changing* your password is because you choose to change it or are updating it as required by OCIO policy every 90 days.

Resetting your password is because you forgot it and need the system to reset it (see Section 2.2, Reset Your Password).

The screenshot shows the 'My Password' interface. At the top, there is a navigation bar with the GoRPM logo. Below it, the title 'My Password' is displayed with the subtitle 'Create a new account password'. The form includes a text input field for 'Username or email address' containing 'demo@gorpm.com'. Below that is a 'Current password' field. A light blue box titled 'Password Requirements' lists the following rules: 'Length must be at least 8 characters', 'Passwords must contain at least: • at least 1 lowercase letter (a-z) • at least 1 uppercase letter (A-Z) • at least 1 number (0-9) • at least 1 symbol (! @ # \$ % & + ?)', and 'Passwords must: • NOT be a derivative of your username or email address • NOT be any of your previous 10 passwords • differ from your previous password by at least 3 characters'. There is a 'Hide password requirements' link. Below the requirements are 'New password' and 'Confirm new password' fields. At the bottom, there are 'SAVE' and 'Cancel' buttons.

Note: A password change may be required if you have just signed in using a temporary password.

4.1.2 Change Security Questions

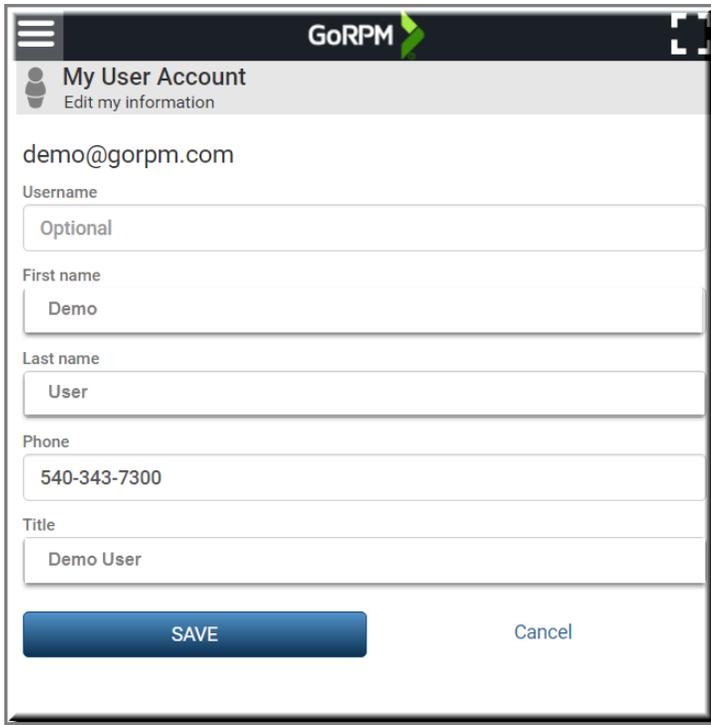
From the **My User Account** page, click the **Change my security questions** hyperlink. The **My Security Questions** screen appears. Click the down arrow to select each new security question, type your answer for each question, then click **SAVE**.

Note: Answers are not case sensitive.

The screenshot shows a web interface for changing security questions. At the top, there is a GoRPM logo and a navigation menu. Below that, the page title is "My Security Questions" with a subtitle "Choose new security questions and answers". The user's email address "demo@gorpm.com" is displayed. The form contains three identical sections, each with a "Security question" dropdown menu, an "Answer" text input field, and a "Confirm Answer" text input field. A callout box with a blue border and white background points to the first dropdown menu, containing the text "Click the drop down arrow and select your new security question". At the bottom of the form, there are two buttons: a blue "SAVE" button and a grey "Cancel" button.

4.1.3 Edit Your Information

From the **My User Account** page, click the **Edit my information** hyperlink. The **Edit my information** screen appears, as shown.

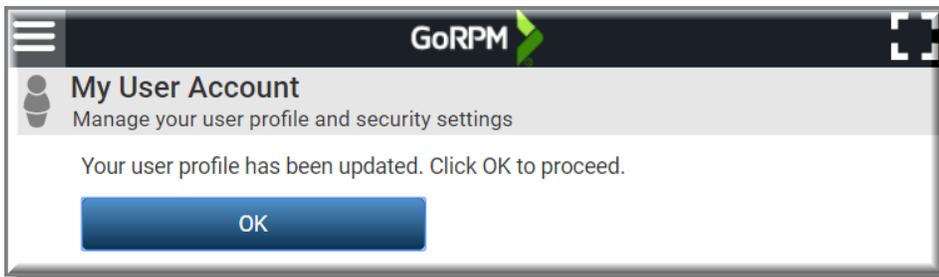


The screenshot shows the 'Edit my information' screen in the GoRPM application. The header includes the GoRPM logo and a hamburger menu icon. Below the header, there is a section titled 'My User Account' with a sub-header 'Edit my information'. The form contains the following fields and values:

- Username: demo@gorpm.com
- Optional: (text input field)
- First name: Demo
- Last name: User
- Phone: 540-343-7300
- Title: Demo User

At the bottom of the form, there are two buttons: 'SAVE' (a blue button) and 'Cancel' (a text link).

Your user name, name, phone number and title may be changed. After making a change to your profile, a confirmation message appears, as shown.



The screenshot shows a confirmation message dialog box. The header includes the GoRPM logo and a hamburger menu icon. Below the header, there is a section titled 'My User Account' with a sub-header 'Manage your user profile and security settings'. The message reads: 'Your user profile has been updated. Click OK to proceed.' There is an 'OK' button.

Note: The email address is a unique identifier for the account, and cannot be changed. If your email address changes, you will need to set up a new user account.

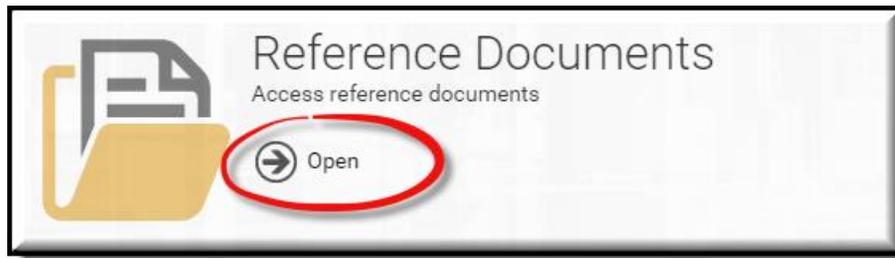
Click **OK** to go back to the **My User Account** page, where you can verify changes you made.

5. Reference Documents

Reference documents are documents related to your project implementation and can include user documentation, business rules for the system, and diagrams. Document formats can include PDFs, Excel worksheets, PowerPoint presentations, Visio documents, etc.

Note: Documents related to a specific entity are accessed through the Data Menu.

On the **Home** screen, click the **Open** button on the **Reference Documents** tile.



A list of all available reference documents is displayed, as shown below.

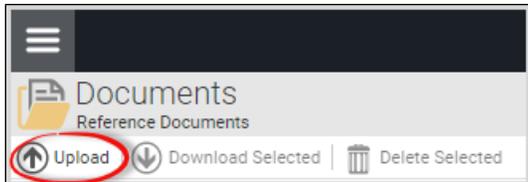
File Name	File Size	Description	Modified	Modified By
Clarifying the Complex.png	136.4 KB	Mike's edits	09/12/2017 2:06 PM	Demo User
Example Adobe PDF.pdf	151.7 KB		09/12/2017 1:01 PM	Demo User
Example Microsoft Access Database.accdb	268.0 KB	Latest	09/12/2017 12:59 P...	Demo User
Example Microsoft PowerPoint Presentation.pptx	31.1 KB	test	04/23/2017 9:56 PM	Demo User
Example Microsoft Visio Drawing.vsd	104.6 KB	Best version	09/12/2017 1:00 PM	Demo User
Example Microsoft Word Document.docx	11.2 KB	Standard	09/12/2017 1:01 PM	Demo User
Example ZIP File.zip	192.7 KB	Sample	09/12/2017 1:01 PM	Demo User
Example.png	684.4 KB		09/12/2017 1:21 PM	Demo User

Here you can view the file name, file size, description, date modified and the name of the user who last modified the document.

To view the creator and creation date, edit the file name or description, as explained below in section 5.1.3.

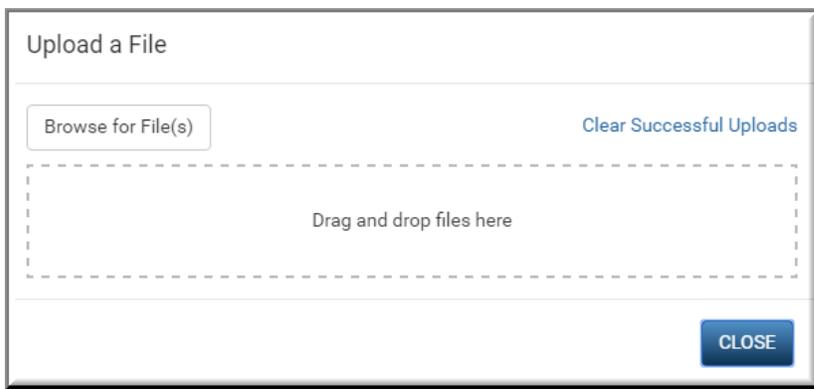
5.1.1 Upload File

Only System Administrators can upload a file to the Reference Documents folder. Click the **Upload** button on the **Header** bar.



The **Upload a File** window appears, as shown below. Click the **Browse for Files(s)** button to locate a file, or drag and drop files into the target area.

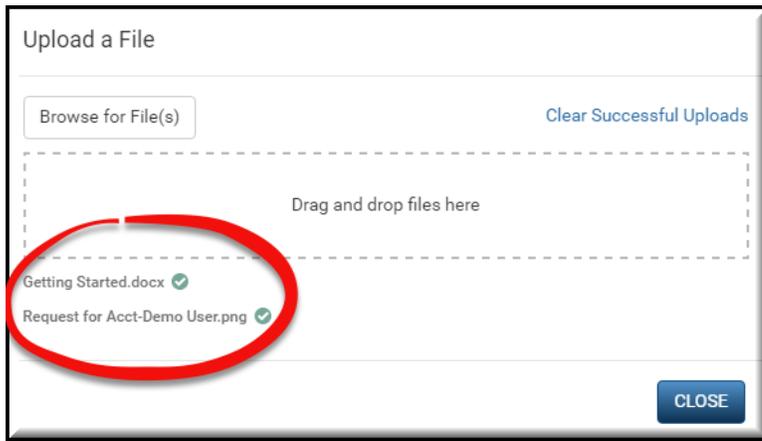
Either click **Browse for File(s)** or drag and drop files into the box



The uploaded file name is displayed. In the example shown, two files are uploaded.

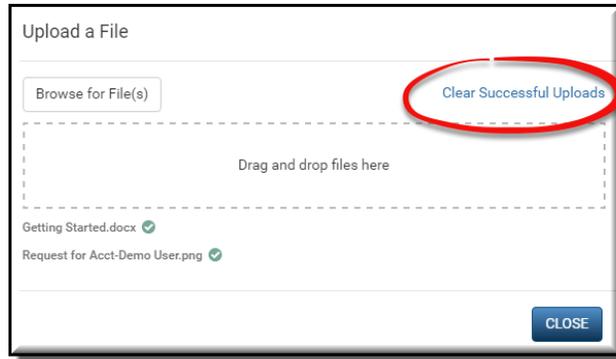
Click **CLOSE**. The uploaded files now appear in the list of available Reference Documents.

Tip: If a document fails to upload, make sure you do not have it open elsewhere on your device.



Note: Files will not upload if your System Administrator has restricted uploading certain file types or file sizes. If you have verified that the file type and size is allowed, and your connection to the network is stable, please contact FPMTSupport@ofm.wa.gov for assistance.

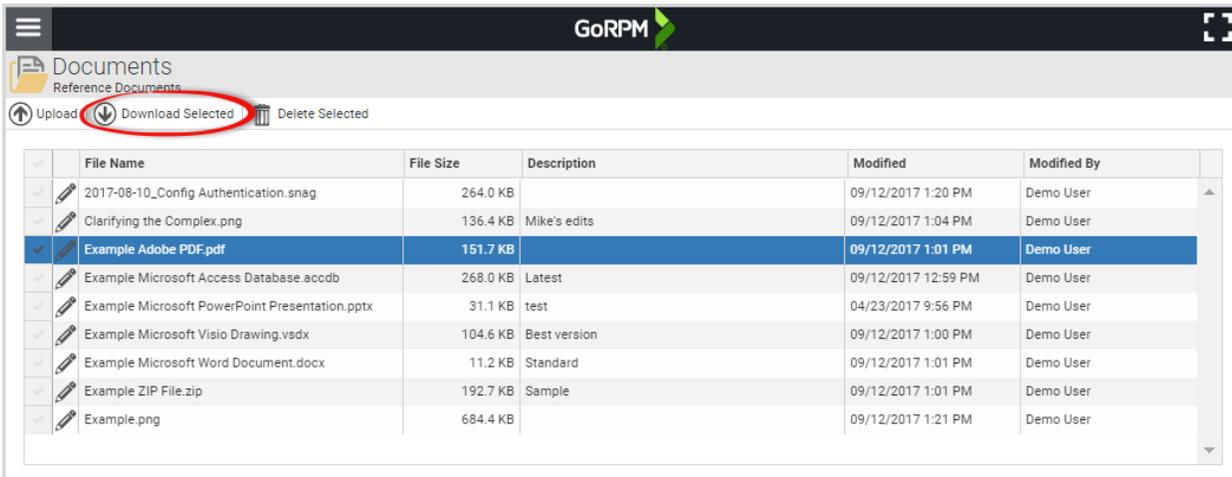
To remove the files in the uploaded list, **Clear Successful Uploads**, as shown.



click

5.1.2 Download File

To download a file, click anywhere on the row (except for the checkbox and pencil icon area) to select the file name. The row becomes highlighted in blue and the **Download Selected** button becomes active, as shown.

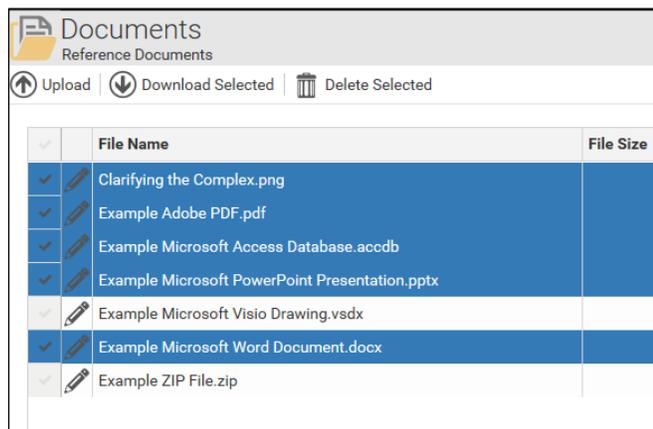


Note: You can download multiple documents at one time.

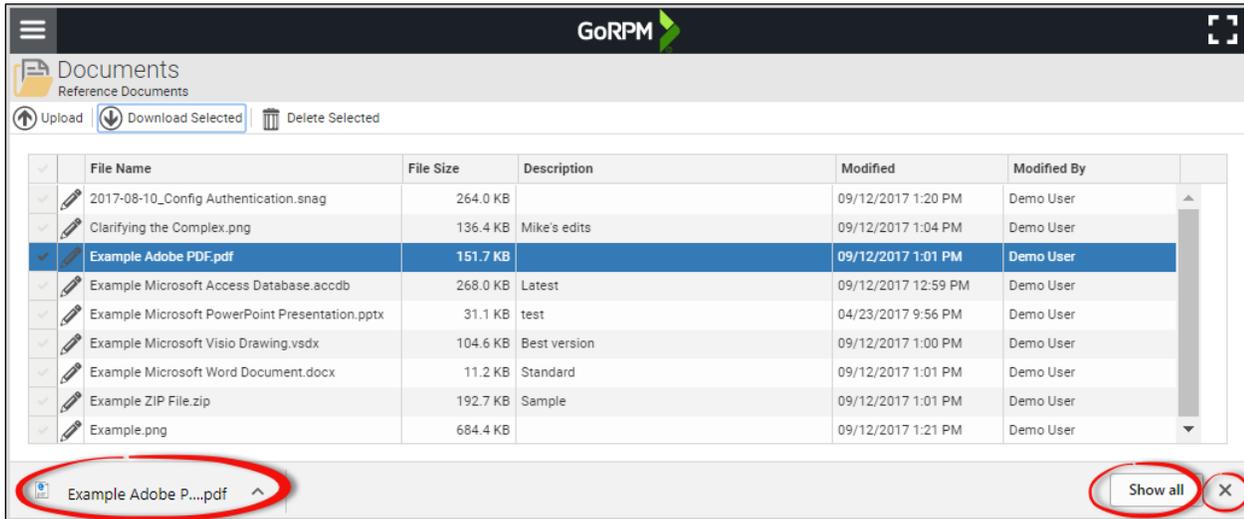
If you select one row and hold the shift key and click multiple rows down, all rows in between are selected.

You can add one row at a time by holding the **Ctrl** key and clicking as many rows as you want. An example is shown to the right.

Multiple documents will download as one zip file.



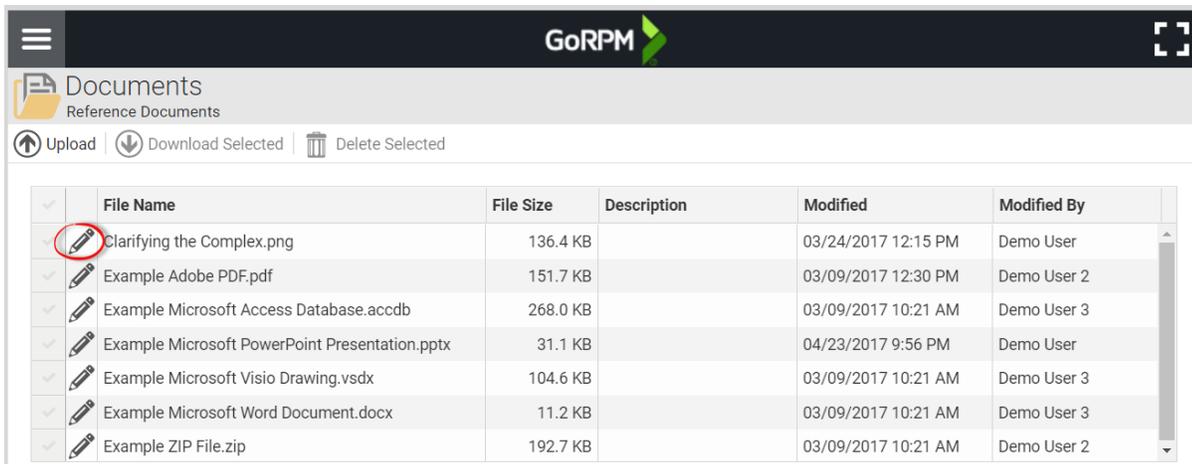
Click the **Download Selected** button. With some browsers, the downloaded file names are displayed in the bottom left corner of the screen, as shown. Documents download to the default location.



Click **Show all** to view the list of recently downloaded documents.

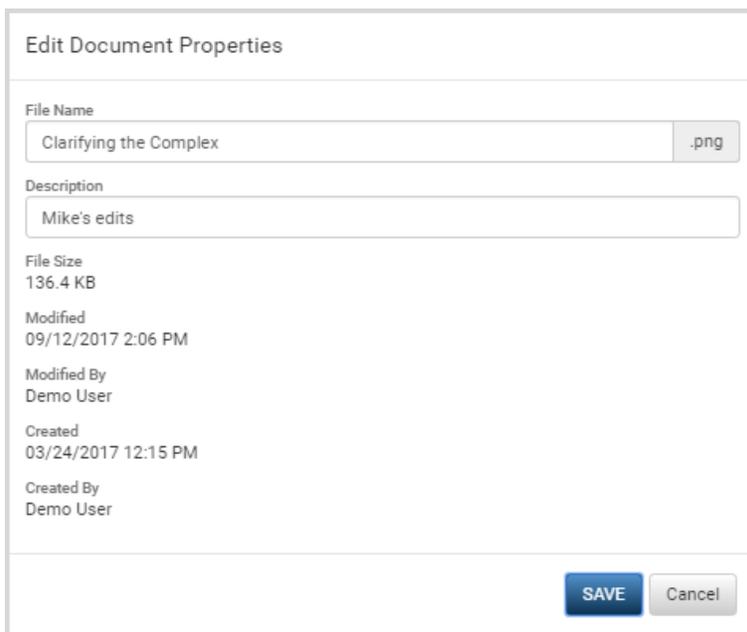
5.1.3 Edit File Name or Description

Depending on your permissions, you can edit the file name or description. Click the pencil icon  to the left of a file name, as shown.



	File Name	File Size	Description	Modified	Modified By
	Clarifying the Complex.png	136.4 KB		03/24/2017 12:15 PM	Demo User
	Example Adobe PDF.pdf	151.7 KB		03/09/2017 12:30 PM	Demo User 2
	Example Microsoft Access Database.accdb	268.0 KB		03/09/2017 10:21 AM	Demo User 3
	Example Microsoft PowerPoint Presentation.pptx	31.1 KB		04/23/2017 9:56 PM	Demo User
	Example Microsoft Visio Drawing.vsdx	104.6 KB		03/09/2017 10:21 AM	Demo User 3
	Example Microsoft Word Document.docx	11.2 KB		03/09/2017 10:21 AM	Demo User 3
	Example ZIP File.zip	192.7 KB		03/09/2017 10:21 AM	Demo User 2

The **Edit Document Properties** window appears. Depending on your permissions you may make edits to the file name and/or description and click **SAVE**.



Edit Document Properties

File Name
 .png

Description

File Size
 136.4 KB

Modified
 09/12/2017 2:06 PM

Modified By
 Demo User

Created
 03/24/2017 12:15 PM

Created By
 Demo User

Note that file name extensions such as .pptx, .png, .pdf, .accdb, .vsdx, .docx, .zip, and .png. cannot be changed.



File name extension

5.1.4 Delete File

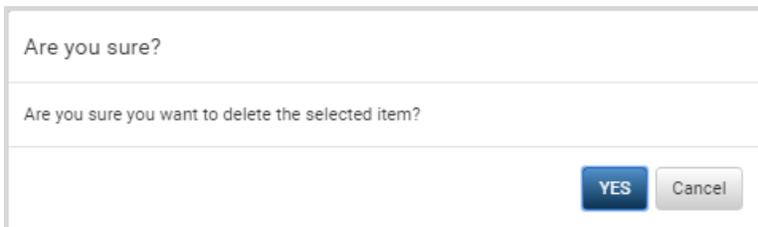
Note: Only Agency Administrators can delete files.

To delete files, click anywhere on the row (except for the checkbox and pencil icon area). The row appears highlighted in blue, as shown.

Then click the **Delete Selected** button.



A delete confirmation prompt appears. Click **YES** to delete.

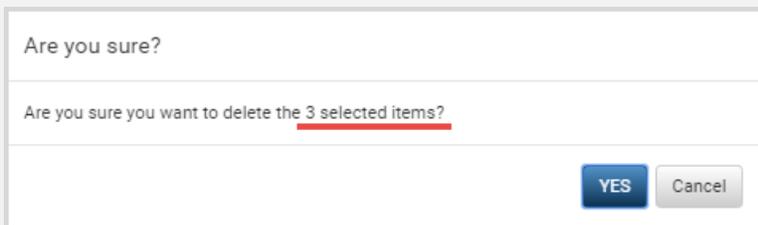


Note: You can delete multiple documents at one time when using a device with keyboard.

If you select one row and hold the shift key and click multiple rows down, all rows in between are selected.

You can add one row at a time by holding the **Ctrl** key and clicking as many rows as you want.

The confirmation window corresponds to the number of items you selected for deletion.

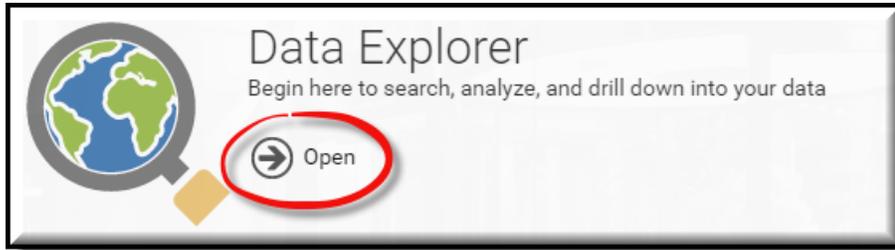


6. Data Explorer

6.1 Overview

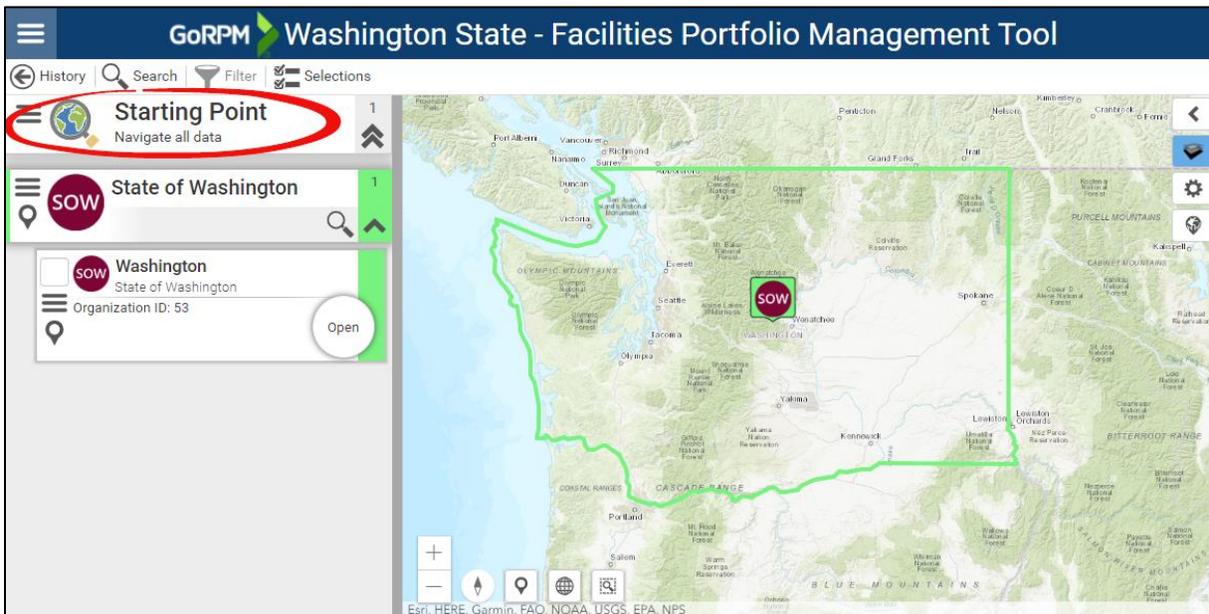
Data Explorer is the module to search, analyze, and drill down into your data. See Section 3, Basic Concepts and Nomenclature, for information related to navigation.

From the **Home** screen, click the **Open** button on the **Data Explorer** tile, as shown below.



Upon opening, a screen appears with the **Starting Point** (data list) area on the left and a map on the right. All agency users will start at the State of Washington level. Data in the **Tile List** on the left that has geometry associated with it is displayed in the Map on the right.

The **Tile List** and Map combination is called the **Starting Point** for **Data Explorer**. The **Starting Point** is where you can navigate to your data, e.g., preview information, run reports, and make changes to an entity's information (permissions allowing).



Map tools are used to view and explore the data displayed. Other major areas of **Data Explorer** are described below.

6.1.1 Data Explorer Overview - Toolbar

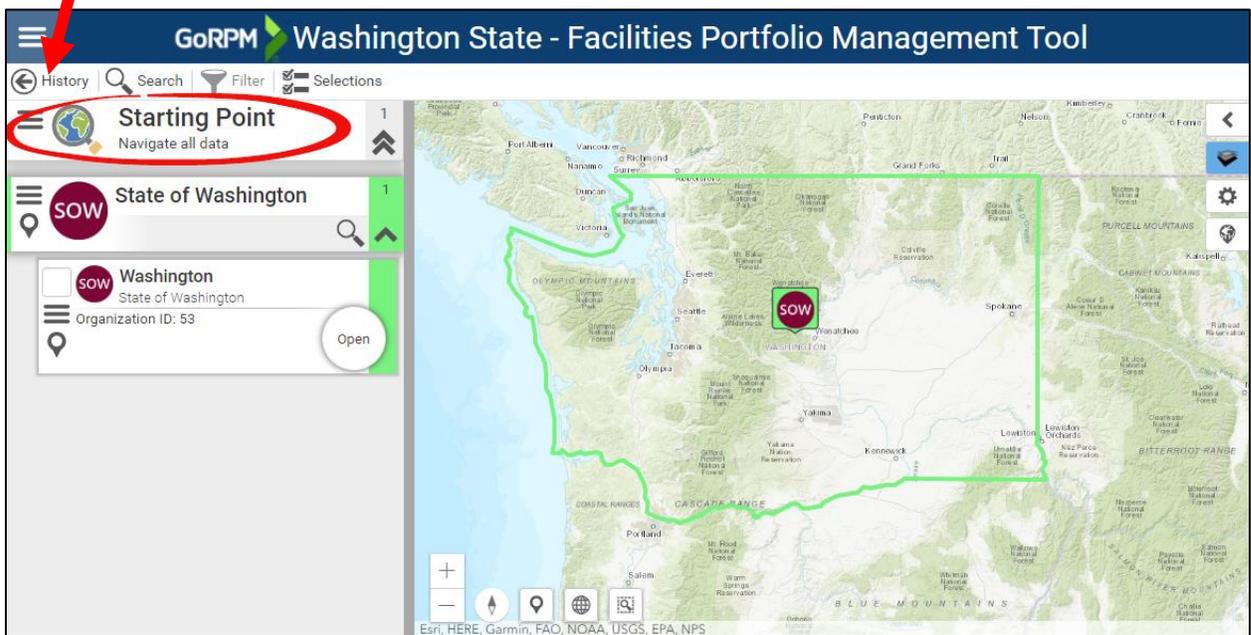
At the top of the **Data Explorer** screen is the header toolbar with the following four tools:



- **History** (of navigation)
- **Search**
- **Filter** (inactive by default)
- **Selections**



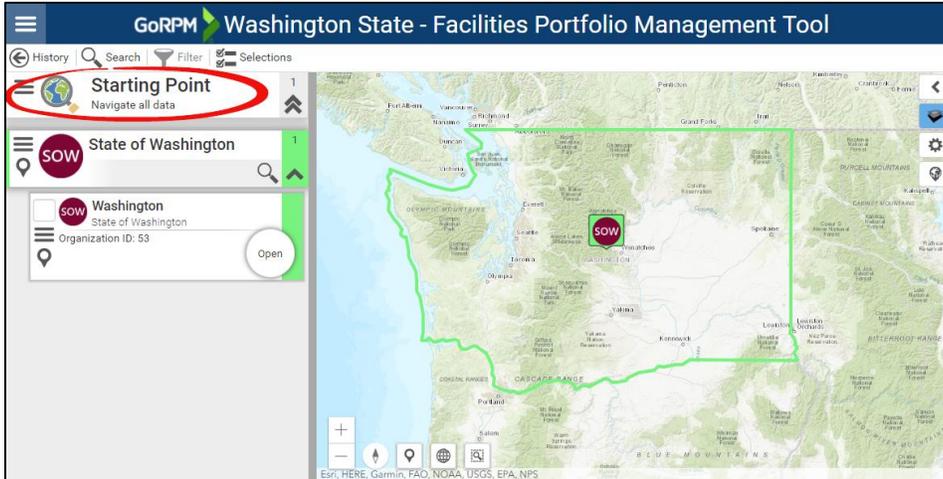
Condensed Toolbar



These tools, explained later, help you to navigate and to manage the data in your **Tile List**.

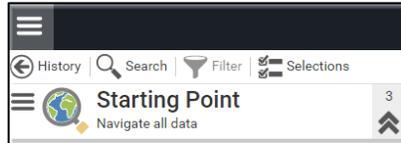
6.1.2 Data Explorer Overview – Context Header

Upon opening **Data Explorer**, the landing page shows the **Tile** menu on the left and a Map on the right. The top left area is the **Context Header**. In the image below, the **Context Header** is called the **Starting Point**, circled in red below.



The **Context Header** displays the context of where you are in GoRPM, such as:

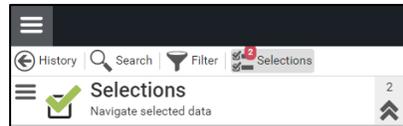
- Starting Point



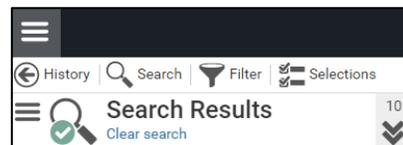
- Level in the data hierarchy



- Selections



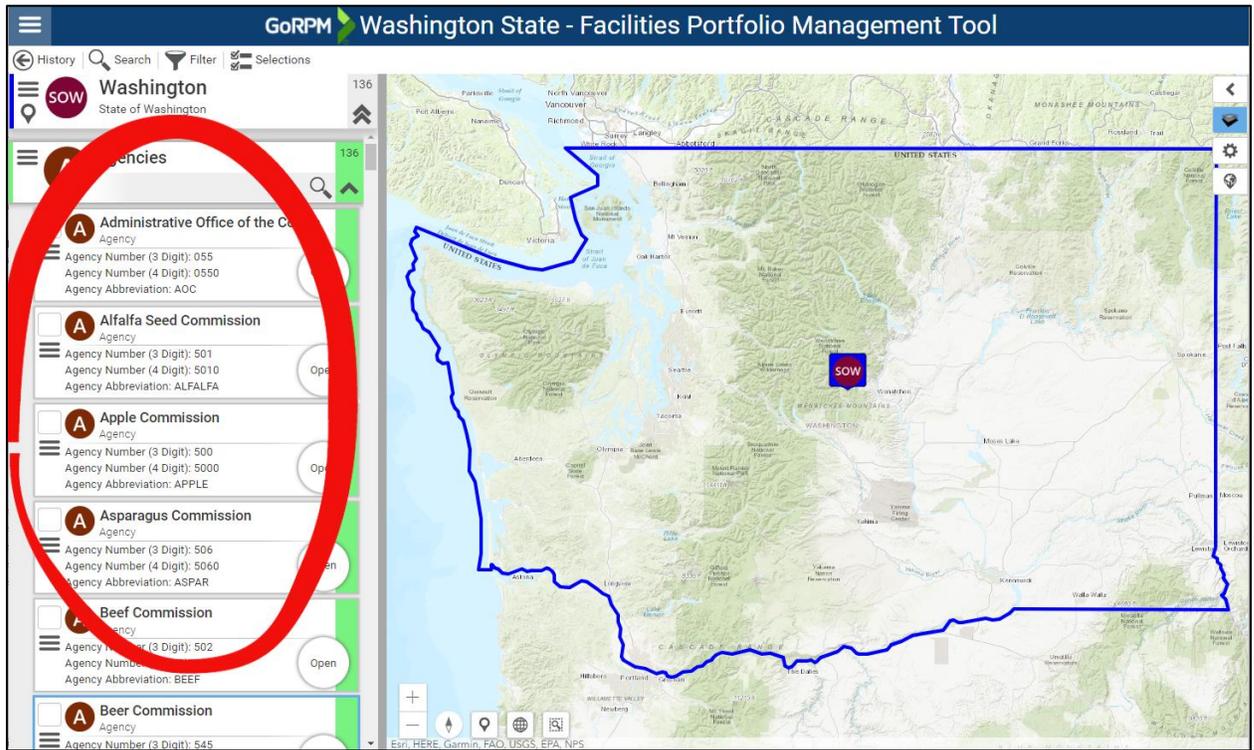
- Search results



6.1.3 Data Explorer Overview - Tile List

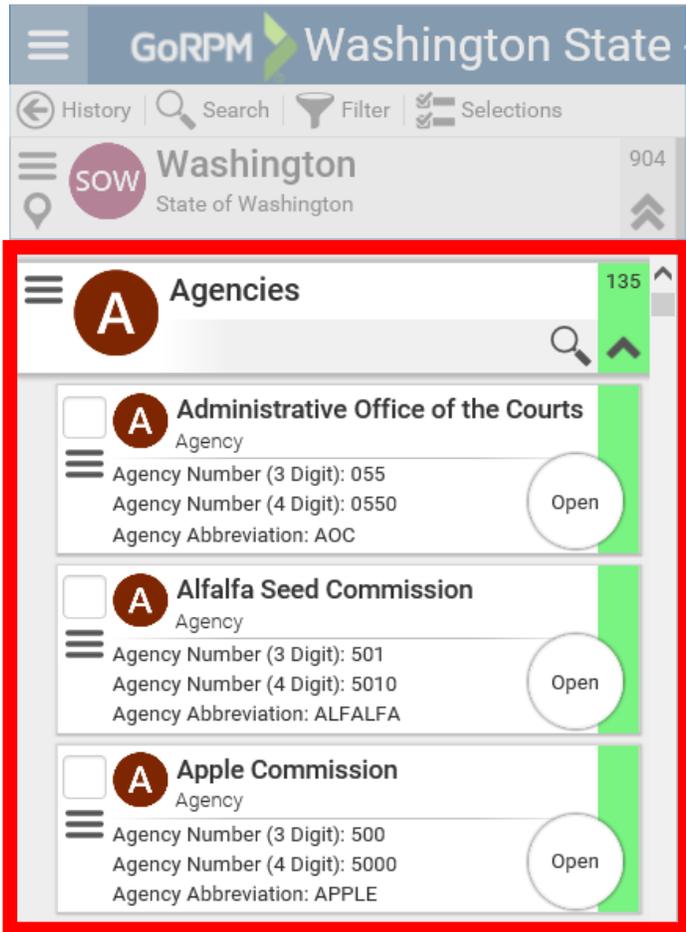
On the left of the **Data Explorer** screen, below the **Starting Point** area, is a **Tile List**. The **Tile List** is circled in red below.

A **Tile** represents a single entity in GoRPM.



The **Tile List** contains a set of tiles grouped by specific entity types, e.g., sites, facilities.

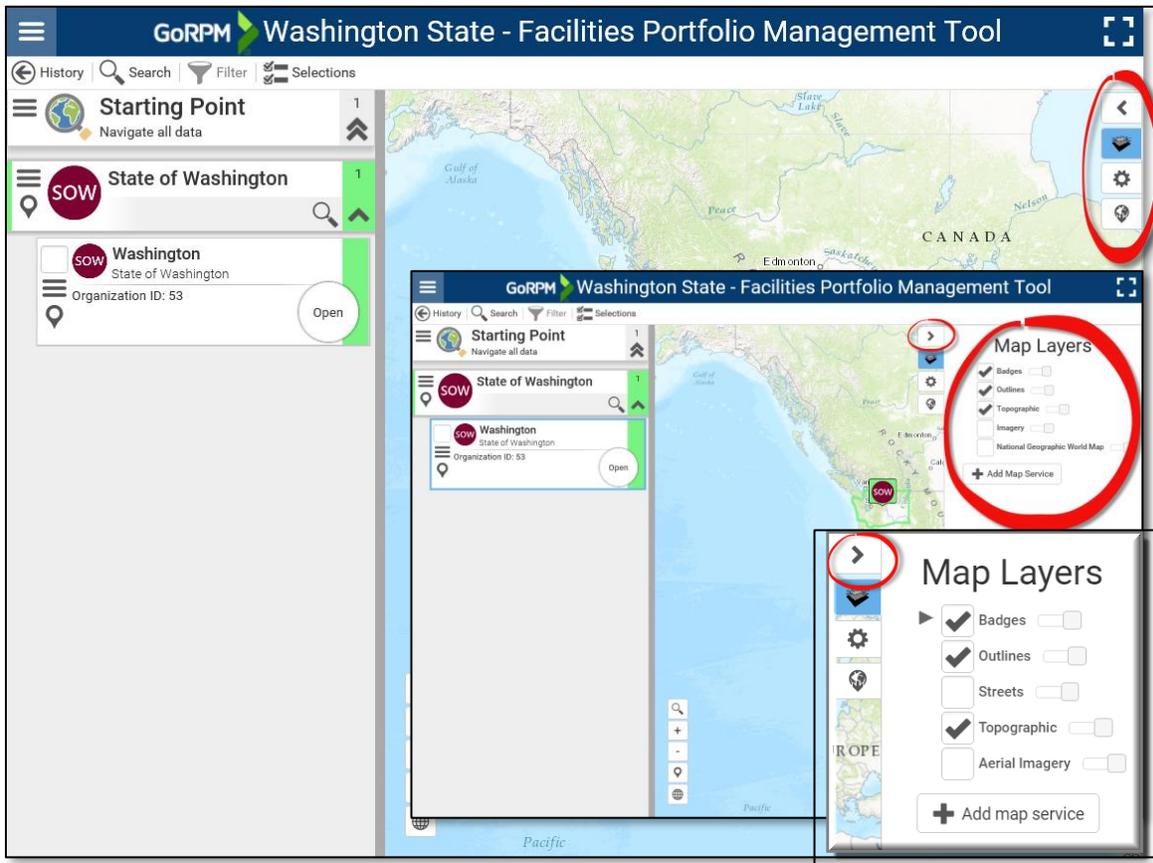
In this example, the entities are agencies.



Note: Data Explorer may have hundreds of groups (Tiles), and thousands of data objects (Entities).

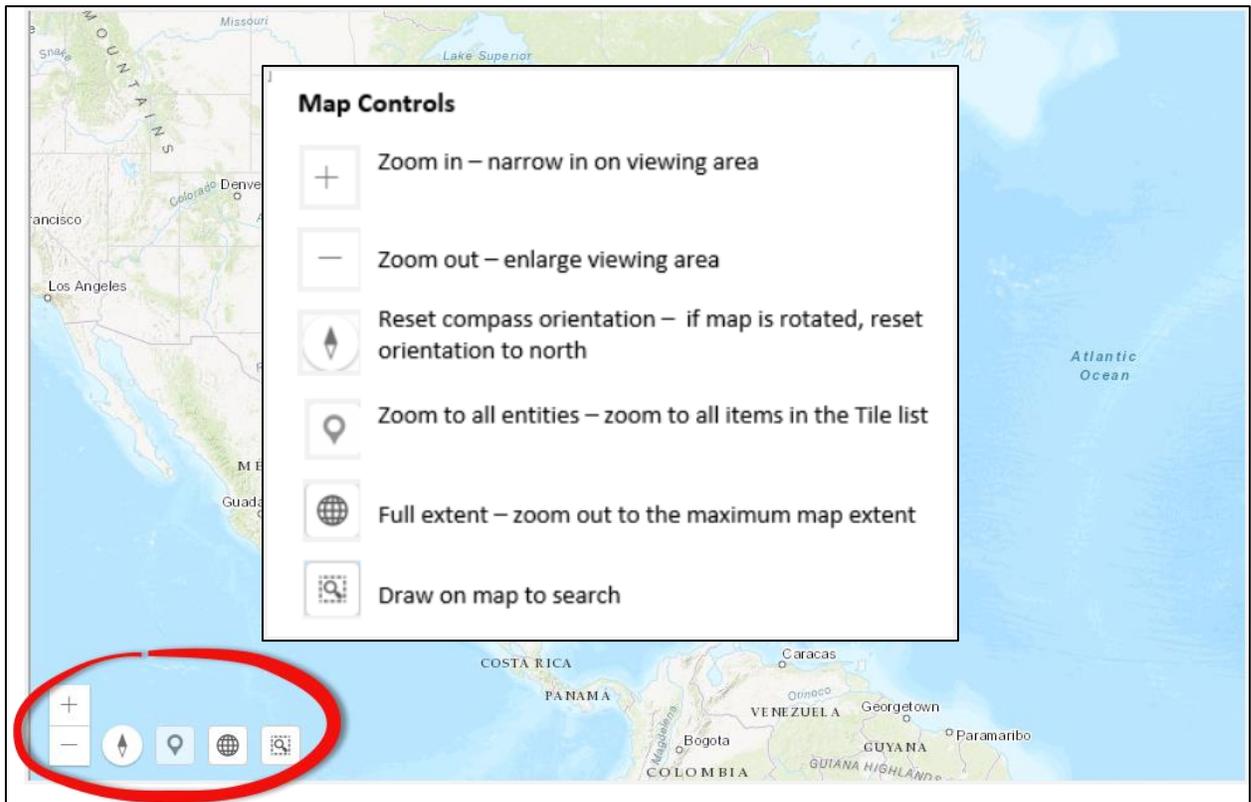
6.1.4 Data Explorer Overview - Map Slide Out Menu

On the right of the **Data Explorer Map**, are four map navigation buttons. The top **Slide left** button allows you to access a **Map Layers** menu. The **Map Layers** slide out menu provides access to **Map Layers**, **Settings** and **Export** capabilities, described in detail later.



6.1.5 Data Explorer Overview - Map Controls

Map Control buttons, circled in red below, allow you to change the way the map is operating.



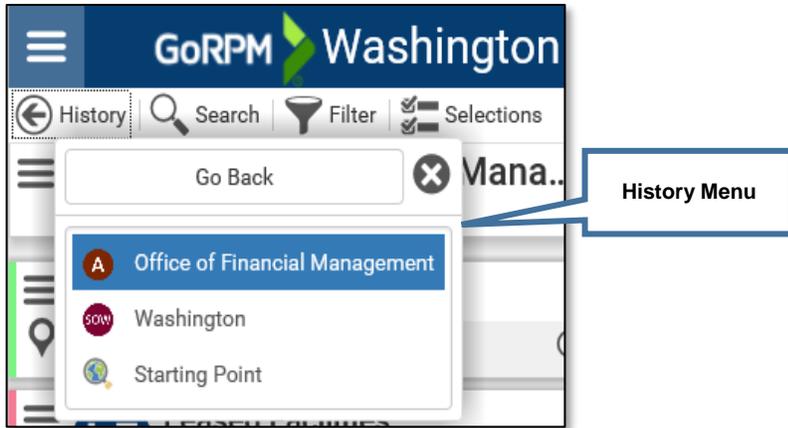
6.2 Toolbar in Detail

6.2.1 History Tool

The **History** button opens a list showing where you have navigated within **Data Explorer**.



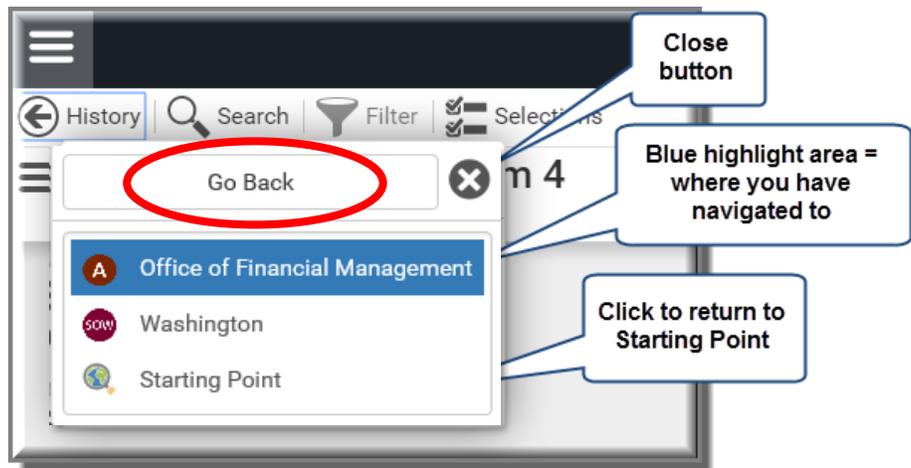
Upon clicking the **History** button, the **History** menu, as shown, appears. The data displayed depends on your navigation in the system, since you accessed the **Data Explorer** module. You have the option to select something from the list and navigate to that point.



The **Go Back** button allows you to navigate back one item, to the previous context in **Data Explorer** you navigated to. Doing so closes the **History** menu.

The **Starting Point** button returns you to your original starting point before you started drilling down into the data.

Note: Wherever you are in the hierarchy (have navigated to) is highlighted in blue; in this example, Level 2, Type 2, Item 4.



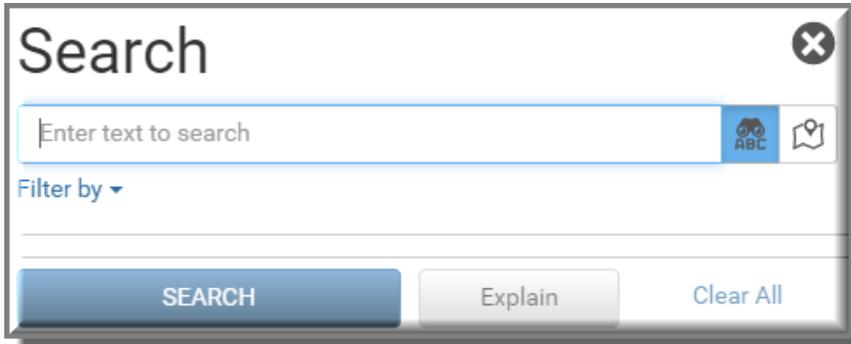
Click anywhere on the **Data Explorer** screen (other than the **History** menu) to close the **History** menu, or click the **Close** button.

6.2.2 Search Tool

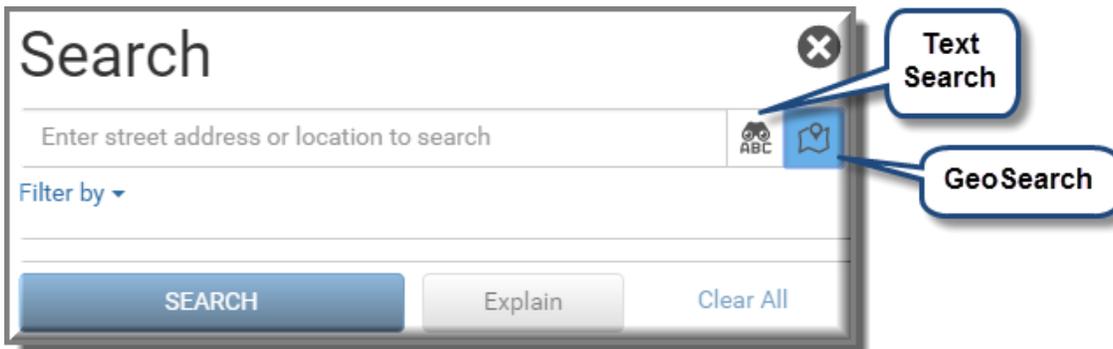
The **Search** tool allows you to search across all data related to the context you're viewing.



The **Search** button opens a search dialog box, such as the one shown below.

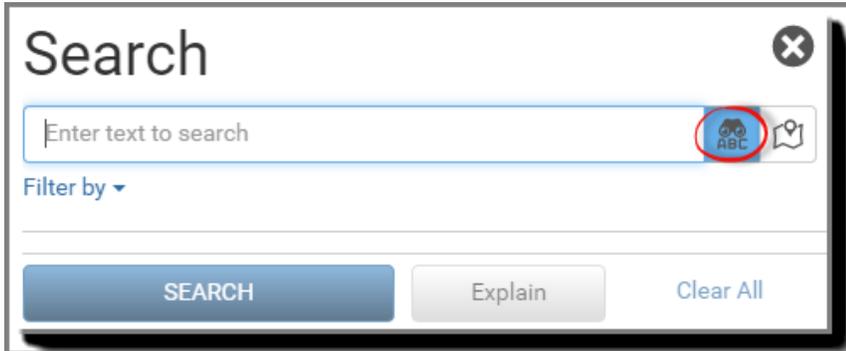


Data Explorer offers two types of search: **Text** and **Geographic**.

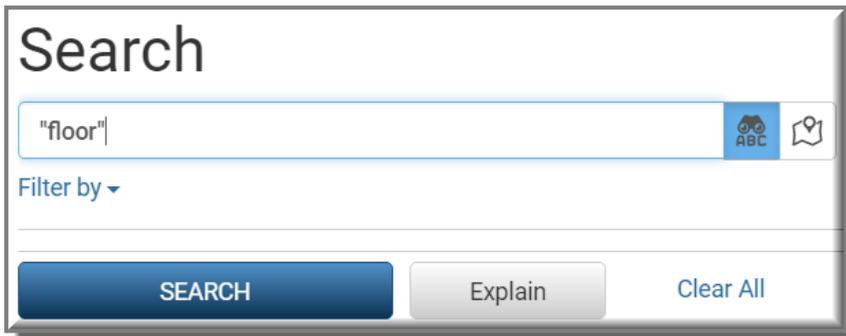


6.2.3 Text Search

The default search is a **Text Search**. The **Text Search** button is active (highlighted), as shown.



Type your search query in the search bar to return entities that meet the specified criteria.



Use double quotation marks (e.g., "floor") around a phrase or single word to restrict a search to that exact word or phrase. Leave off quotes to return all items.

Upon typing text in the bar, the **SEARCH** button becomes active, as shown. Click **SEARCH**.

Partial matches are returned. For instance, searching for "floor" returns entities that contain "floor," "floors," "flooring," etc.

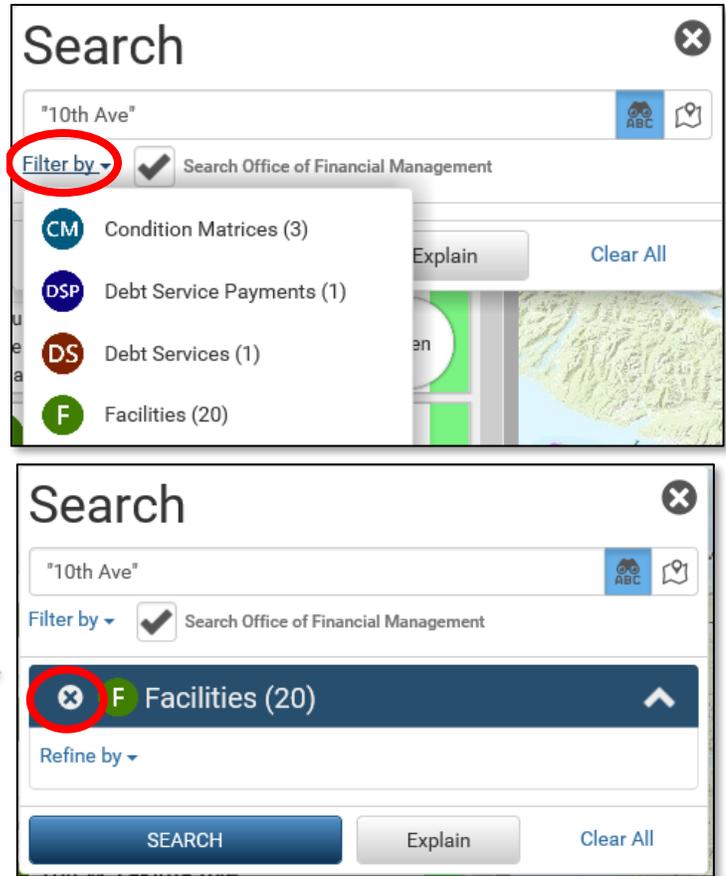
6.2.3.1 Filter (Search) by

You may filter the results of a search.

Click the **Filter by** hyperlink to:

- Display filter options
- Add a desired type to filter by

In this example, four options on which to filter the text “10th Ave” are shown. Upon selecting “Facilities” the search window showing the same appears, as shown.



You have the option to click **Close** (button to the left of the entity, shown circled in red) to remove it from the search. In general, use the **Close** button to clear one search filter item in a list of many.

Clear All clears all data in the search bar, *and* clears all filtered items.

The **Collapse** arrow to the right of the entity name (in this example, Facilities) expands and collapses the search filter criteria.

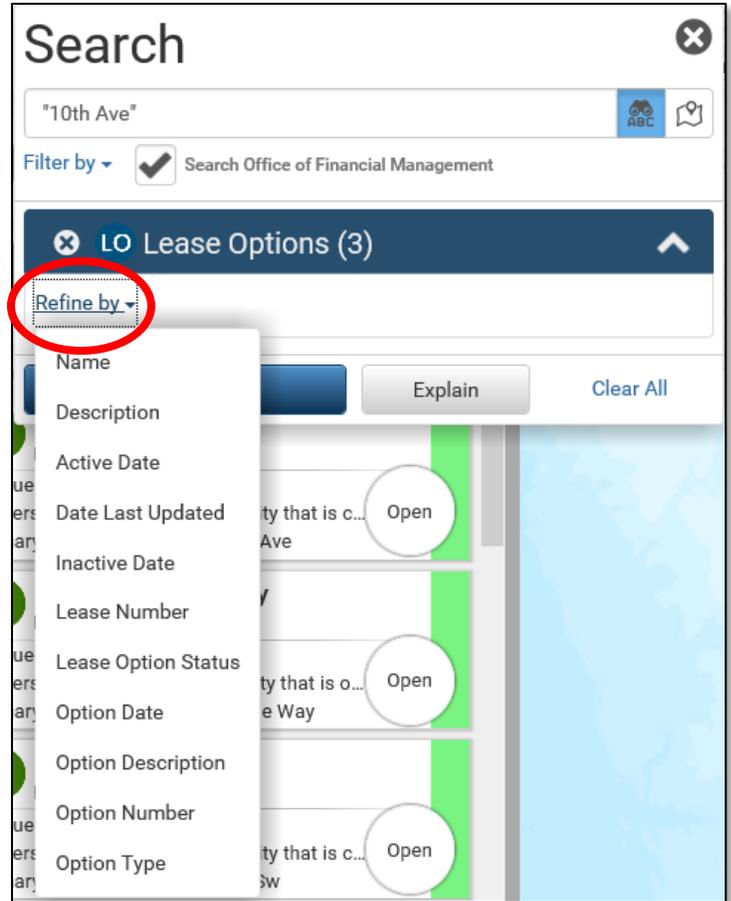
Click **SEARCH** to continue the filtered search.

6.2.3.2 Refine by

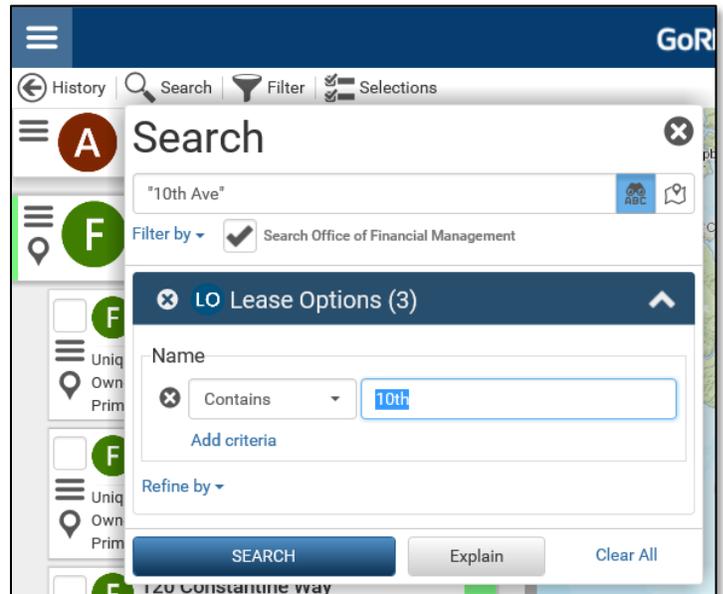
After choosing item(s) to filter, use the **Refine by** hyperlink to further refine your search by attributes associated with the entity. For example, by name, description, date, or size.

The specific attributes of an entity considered when performing a search are shown in the screen to the right.

To close the list, click anywhere on the screen, other than the list.



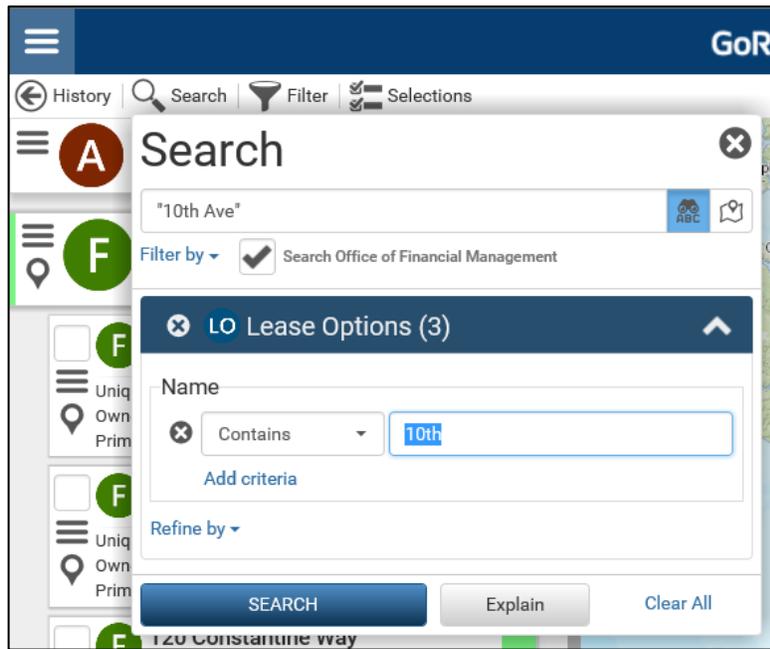
In the screen to the right, the **Name** attribute is chosen to refine by.



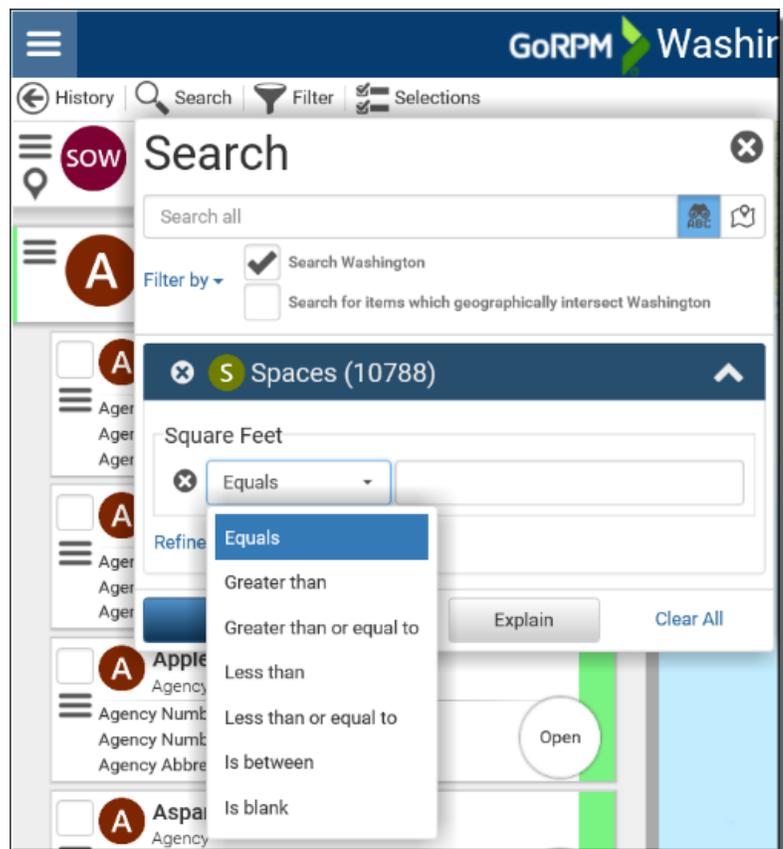
For each attribute chosen, depending on its type, you may find a subset of the data by matching against logic such as:

- Contains
- Equals
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Is between
- Is blank

For example, the **Name** attribute allows refining by entering criteria for: **Contains**, **Equals**, **Is Blank**, as shown.



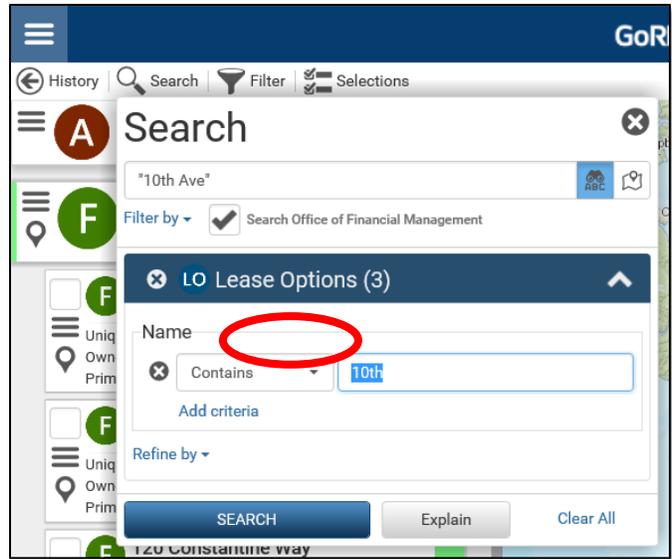
Numerical attributes allow refining by seven parameters, as shown with the **Decimal** attribute.



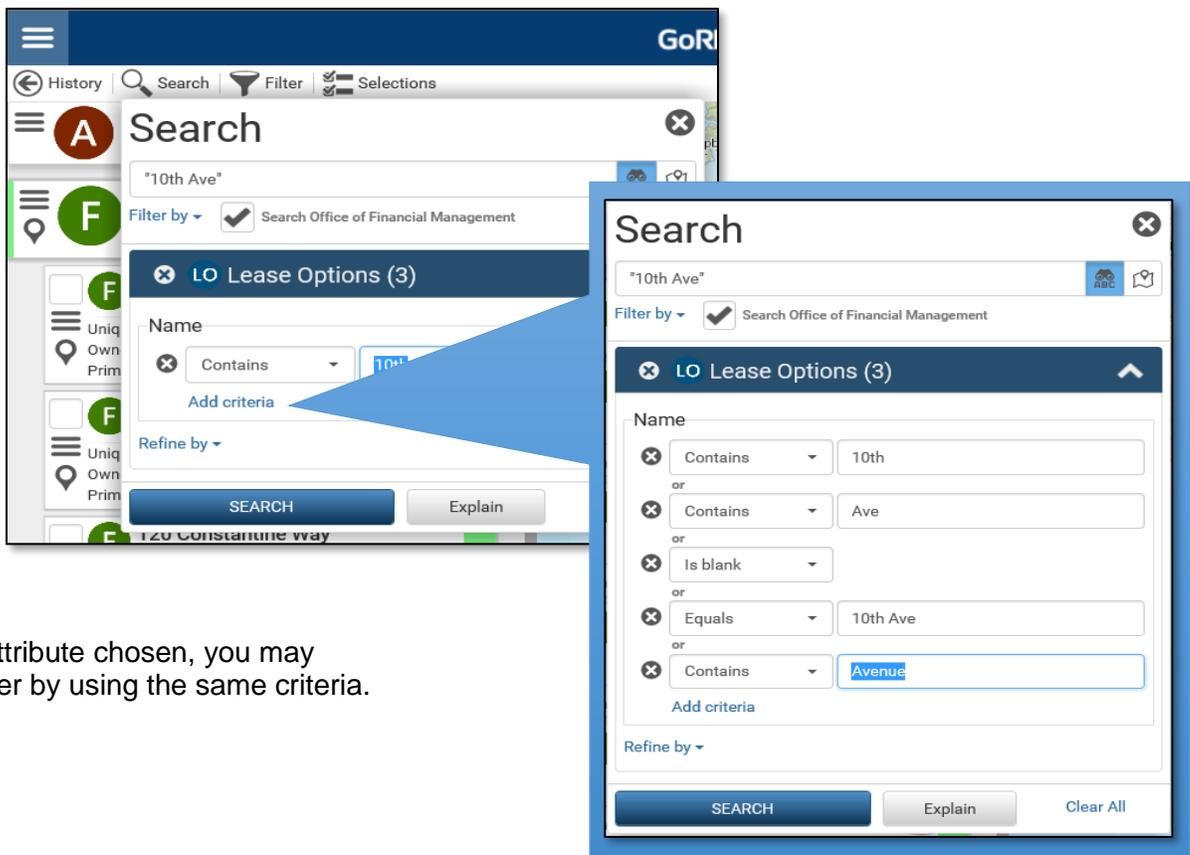
After selecting the parameter, type criteria in the space to the right of the criteria label, as shown.

After you type text in the blank field, the **Add criteria** hyperlink appears, as shown.

Note: Click the **Close** button below an Attribute Type (e.g., Description) to remove a search value (e.g., Contains).



Click **Add criteria** to add more criteria for each attribute, as shown below.

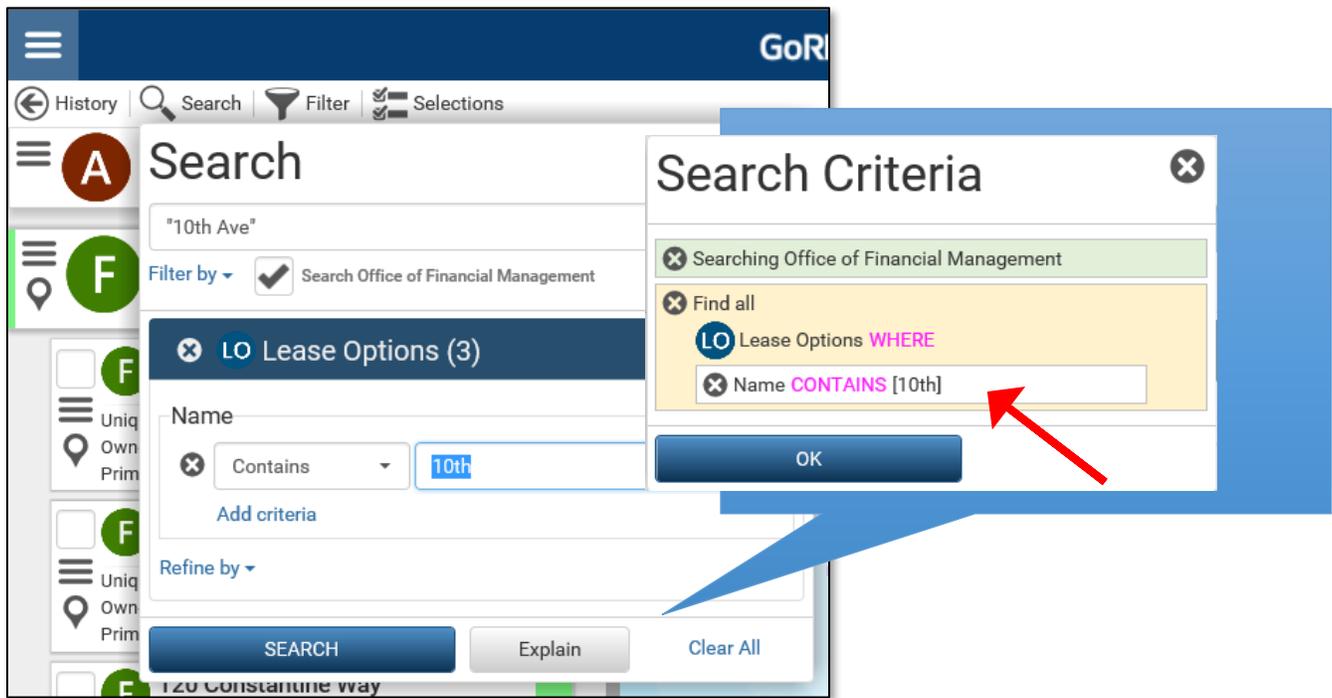


For each attribute chosen, you may refine further by using the same criteria.

6.2.3.3 Explain

The **Explain** button describes the search criteria in a text format, as shown below.

If you have filtering criteria (e.g. “Contains” or “Equals”), the results include that data, as shown below.



6.2.3.4 Clear All

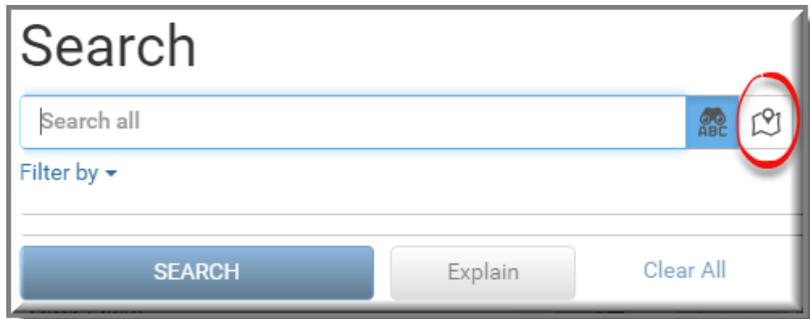
The **Clear All** hyperlink in the bottom right corner of the **Search** window allows you to clear all criteria, and reset the search.

6.2.3.5 Geographic Search

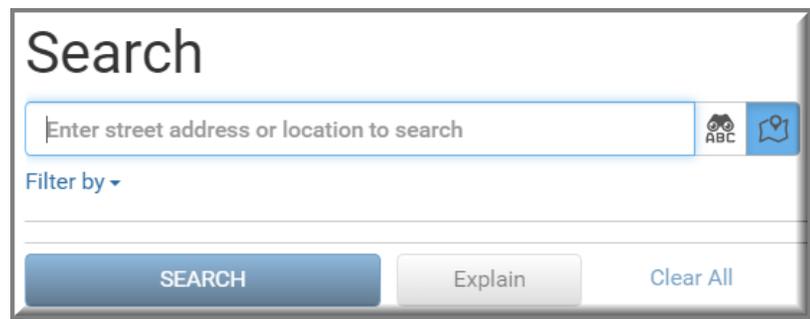
A Geographic or **Geo Search** allows you to search a street address or location against the context of the data in the **Tile List**.

Note: A geographic location is defined as a major landmark, a geographical feature (a man-made or naturally created feature of the earth, e.g., a river, town, city, county, state, province or country).

To search geographically, click the **Geo Search** button.



The **Geo Search** button becomes highlighted, and you are prompted to enter a street address or location, as shown.



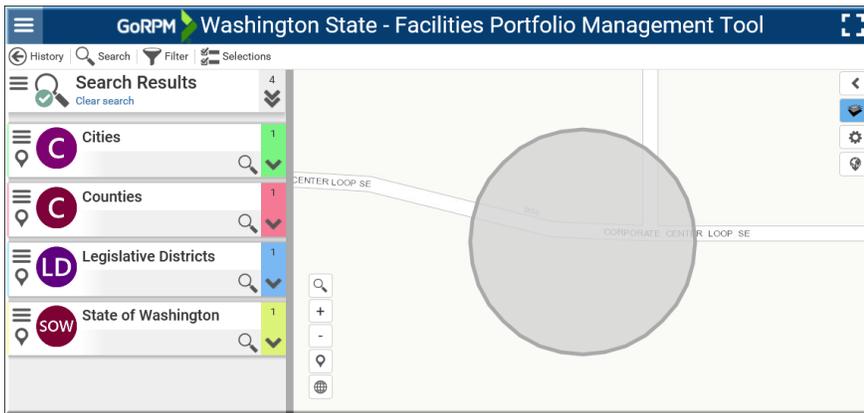
Upon entering a street address or location, you have the option to filter the results by item levels and types. For more information on filtering searches, see [Section 6.2.3.1, Filter \(Search\) by](#).

6.2.3.5.1 Search by Address

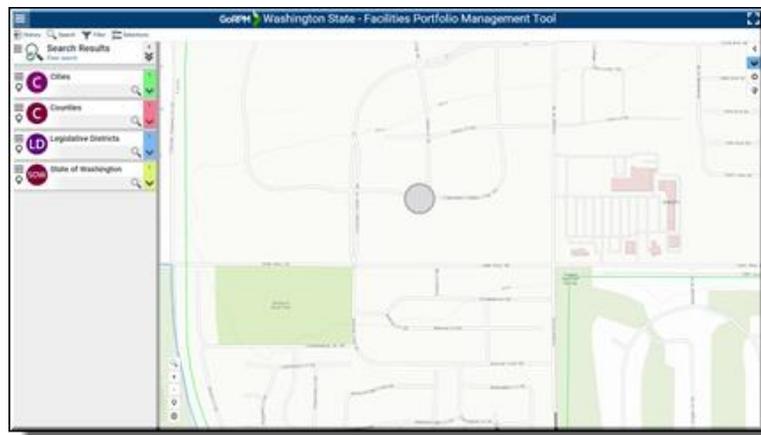
In the example below, a street address is entered.



Upon clicking **SEARCH**, results appear in the Map. The Map zooms to the address and places a buffer around the search location, as shown below.

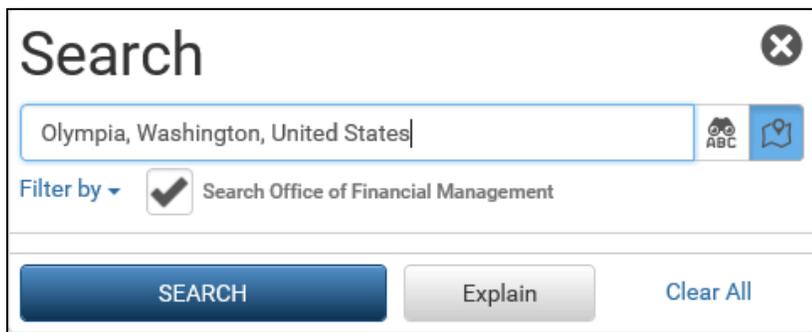


Using the **Zoom out** button on the **Map Controls** bar (see Section 6.1.5, Data Explorer Overview - Map Controls), a clearer view of the search result appears.

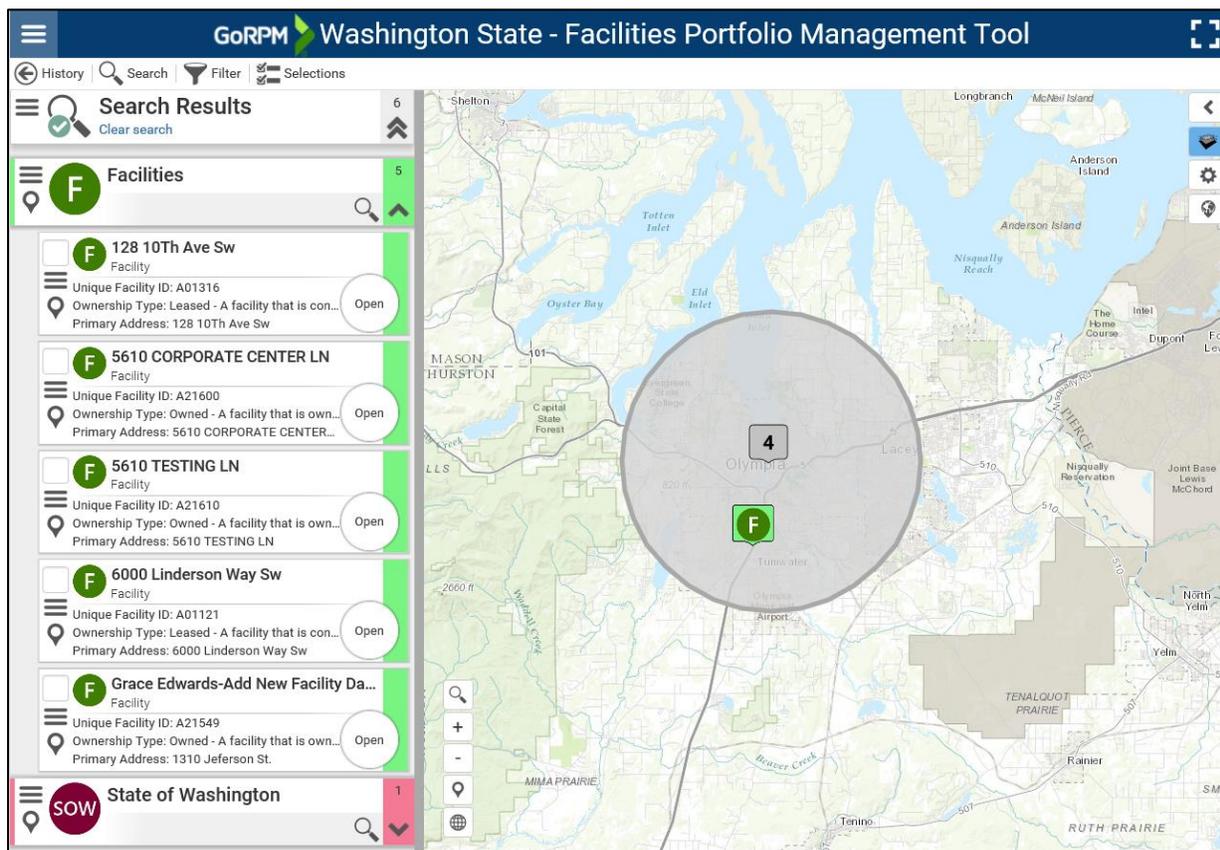


6.2.3.5.2 Search by Location

In the example below, a location is entered.

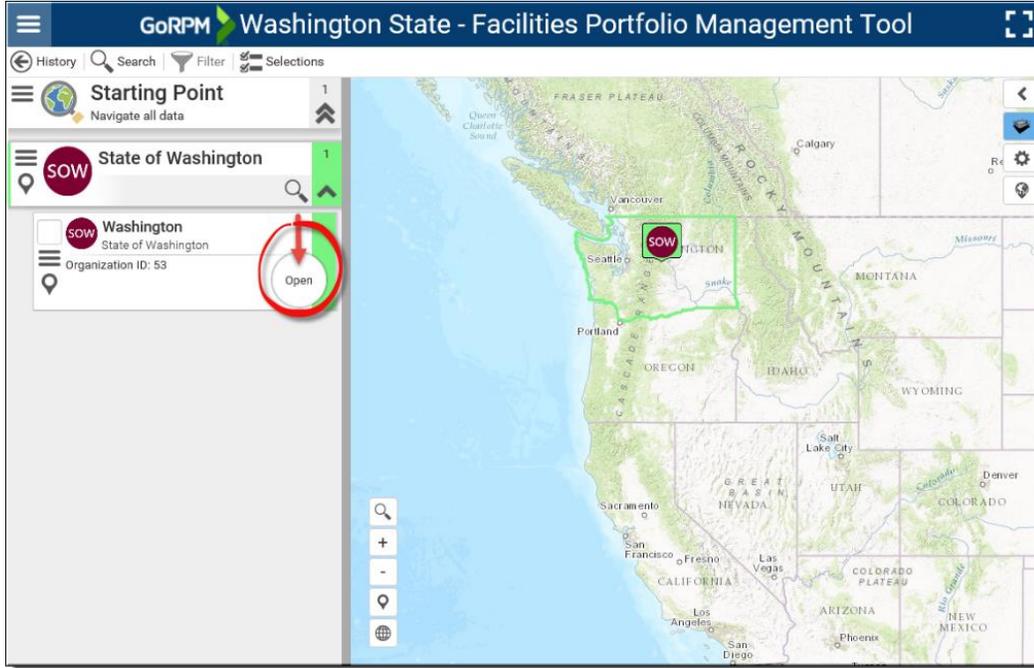


Any data in the current context that geographically intersects with the search areas is returned in the search results, as shown below.



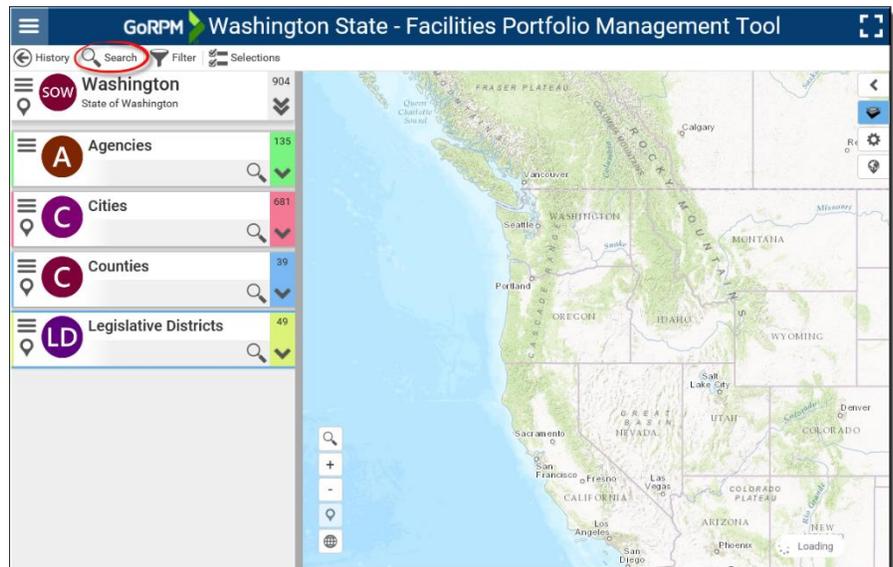
6.2.3.6 Search Items Geographically Intersecting with the Entity

You may search for items which geographically intersect with the Entity using a feature called **Search Entity Checkbox**. Checkboxes do not show at the Starting point--you must open an item in the **Explore Data Tile List** first. Below is the Starting point with an entity. Click **Open** (circled in red below).

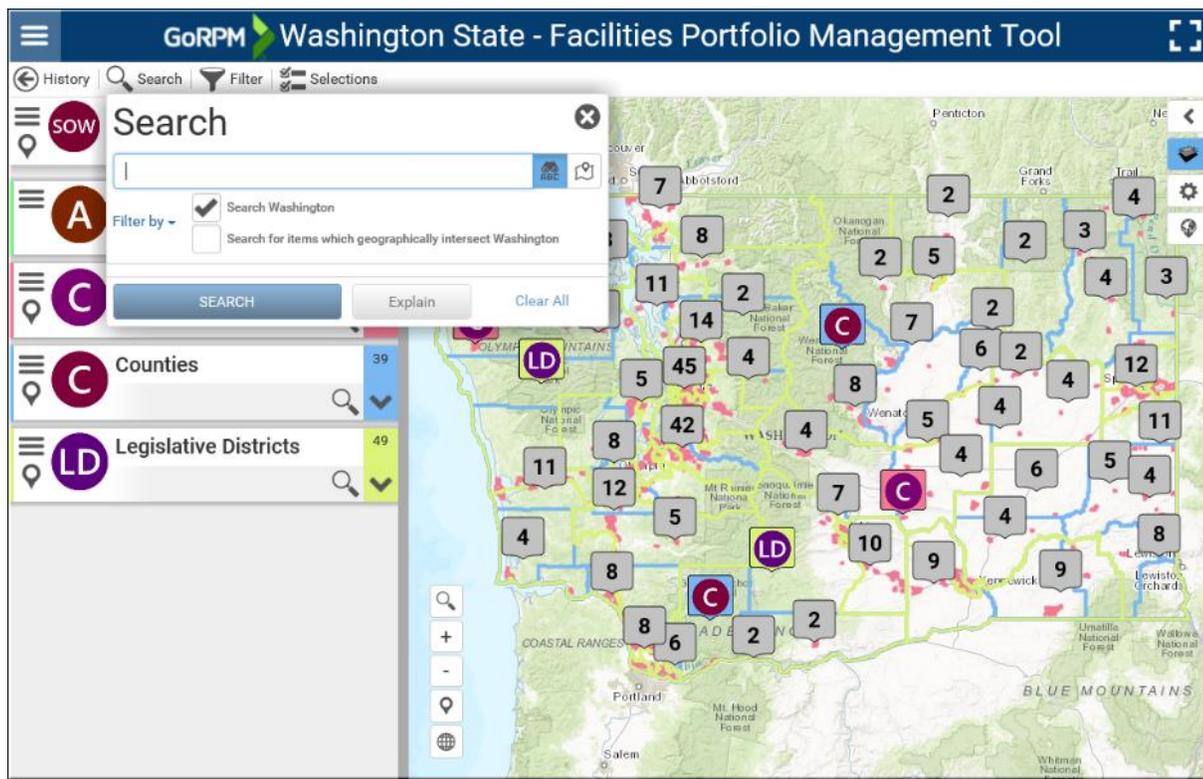


Upon clicking **Open**, you've navigated in the hierarchy to State of Washington.

Click **Search** in the **Data Explorer** toolbar.



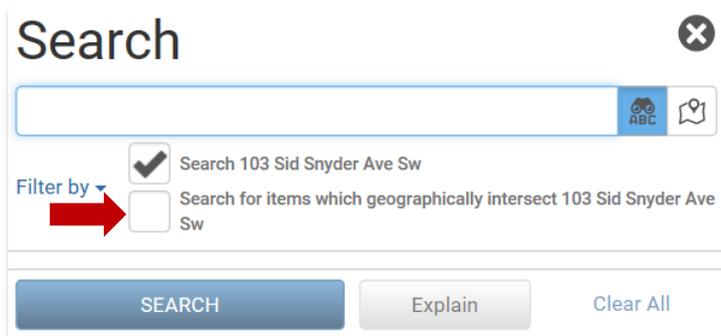
The **Search** dialog box appears with two checkboxes.



The top checkbox is, by default, checked for the item you're on (in this example, State of Washington). This checkbox limits the search to ancestors and descendants related to your current context. For more information on ancestors and descendants, refer to [Appendix A, Glossary of Terms](#).

Note: If you unclick the checkbox, searches occur across the entire data set, as if you were searching from the **Starting Point**.

Click the second checkbox to search for entities with geometry that intersect geographically with the selected entity.

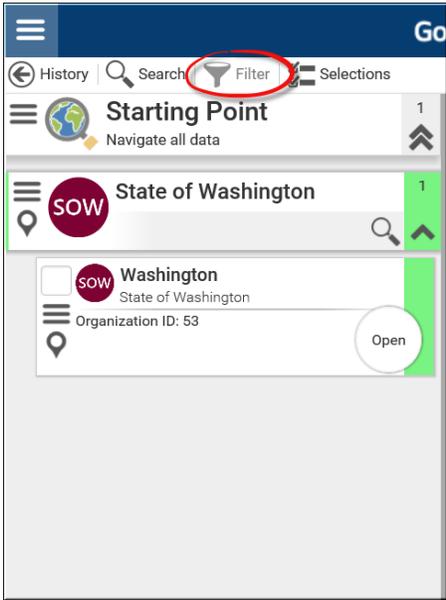


6.2.4 Filter Tool

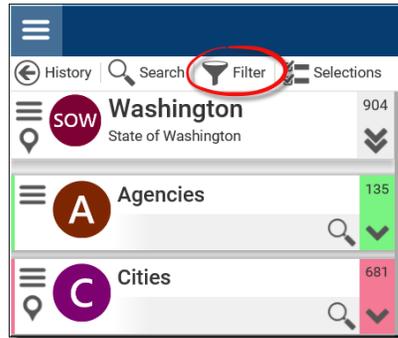
The **Filter** tool allows you to filter the visible data. In other words, to select an Entity or Entities to filter the search by.



As shown, the **Filter** option by default is inactive (grayed out), but is enabled when you begin to filter more than type of entity.

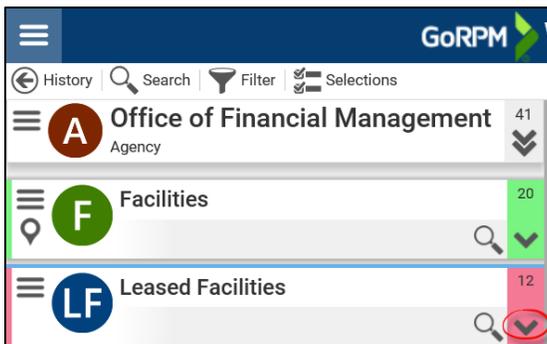


Inactive Filter Button – One Entity Type



Active Filter Button – More than one Entity Type

Filtering is done by checking or unchecking the selection boxes of items. Click the **Expand** button (the down arrow) of the **Entity Tile**, shown circled in red below.



Note the number “12” here. This Entity type has twelve corresponding items, as shown in the next screenshot.

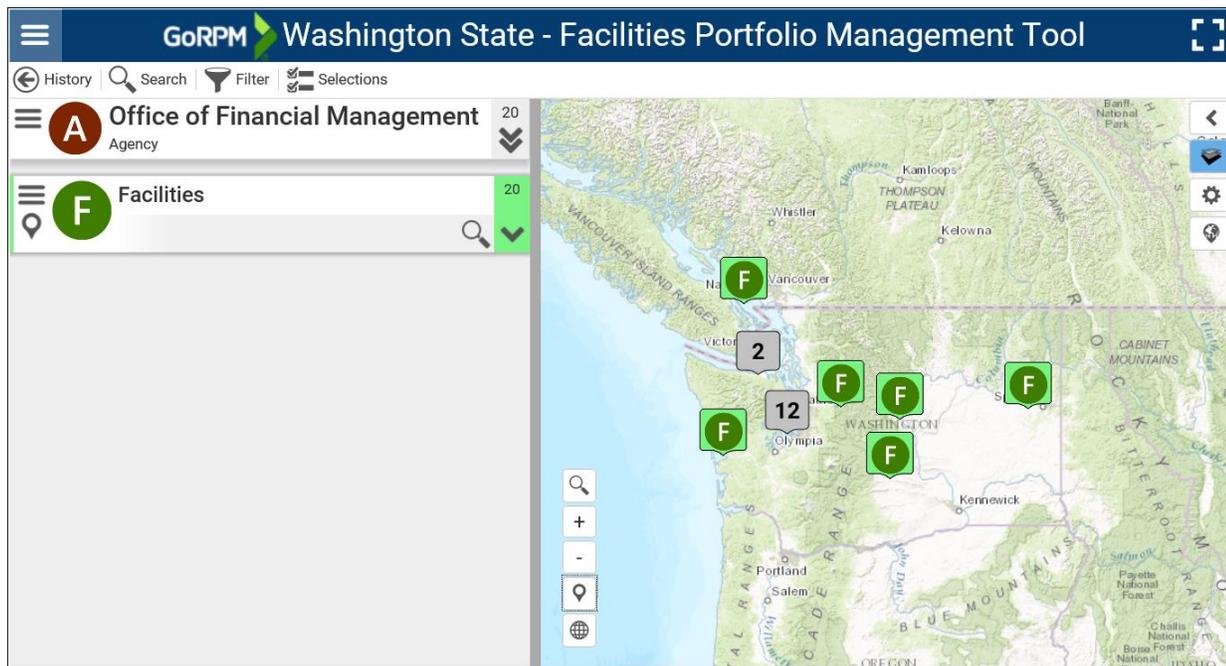
Upon clicking **Filter** on the toolbar, a pop up menu appears with options to:

- **Select all** to check all items to filter from the **Tile List**
- **Deselect all** to uncheck all items to filter from the **Tile List**



Click **APPLY** to filter the **Tile List**, or click **Cancel** to close and to not apply the filter.

Upon clicking **APPLY**, results appear in the map, as shown.



6.2.5 Selections Tool

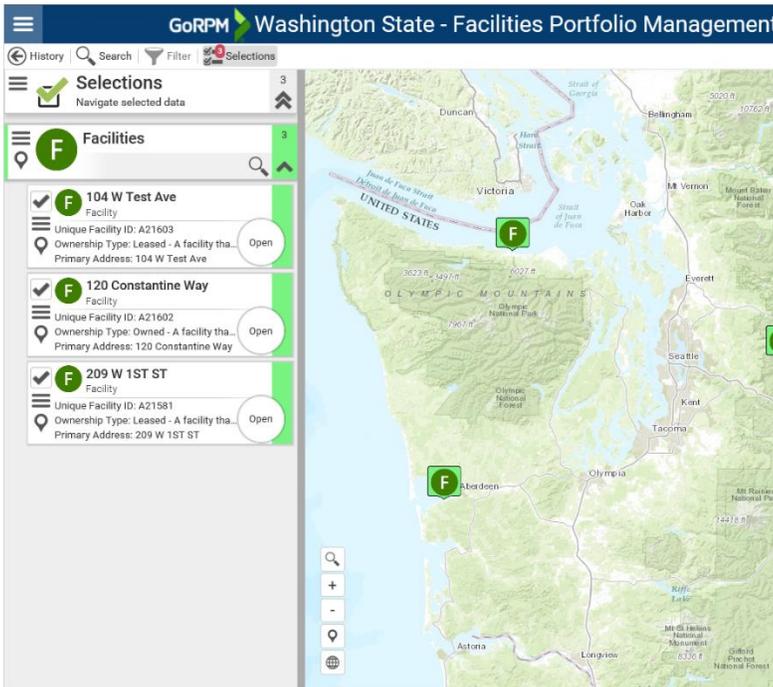
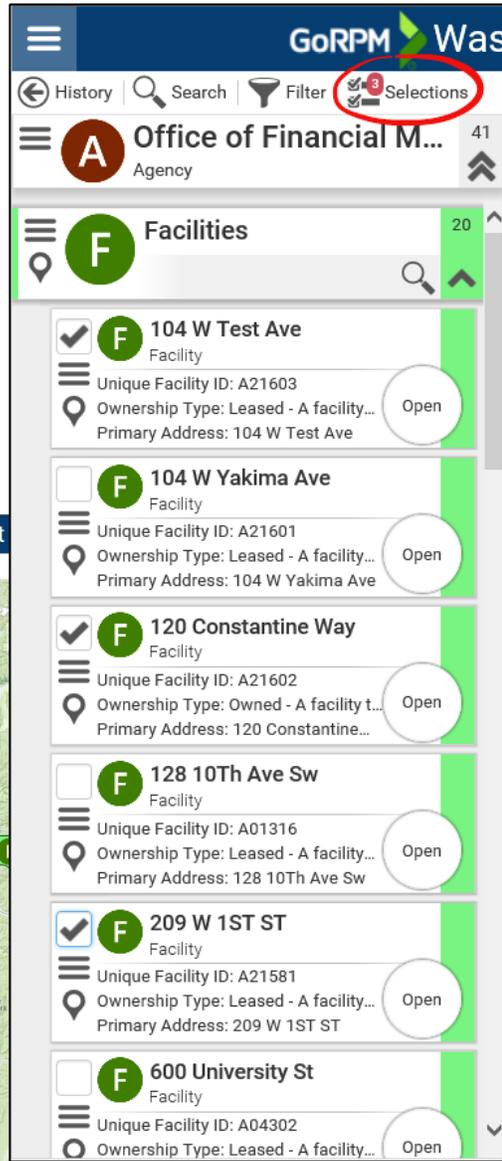
The **Selections** tool allows you to view a subset of Entities.



Click the checkbox to the left of each Entity you want to view.

Note: The number of checked checkboxes corresponds to a **Selections** button badge. In the example on the right, three checkboxes are checked and the badge **3** is displayed.

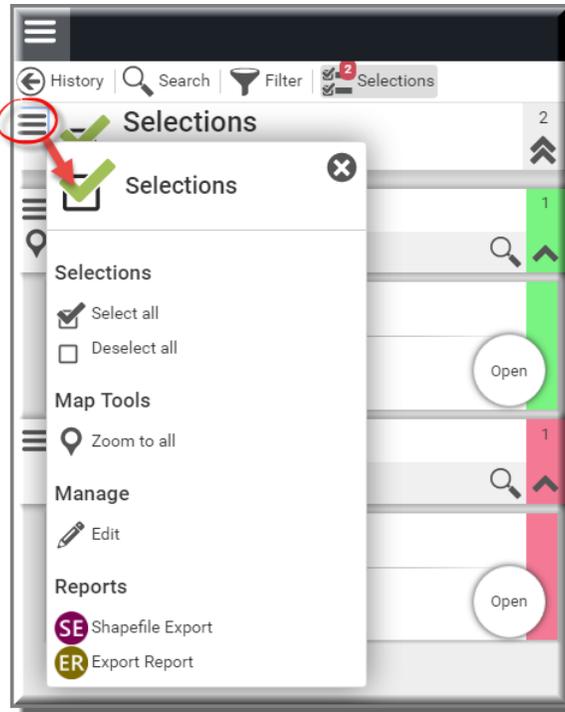
Upon clicking **Selections**, just your selected Entities appear in the **Tile List** and in the **Map**. In other words, the Map will zoom to the Entities that have geometry in the **Selections** list, as shown.



Click **Selections** again to go back to the full **Tile List**.

6.2.5.1 Selections Menu in Detail

The **Selections** menu is shown below. With **Selections** as your **Starting Point**, access the menu by clicking the menu icon, as circled in red below.



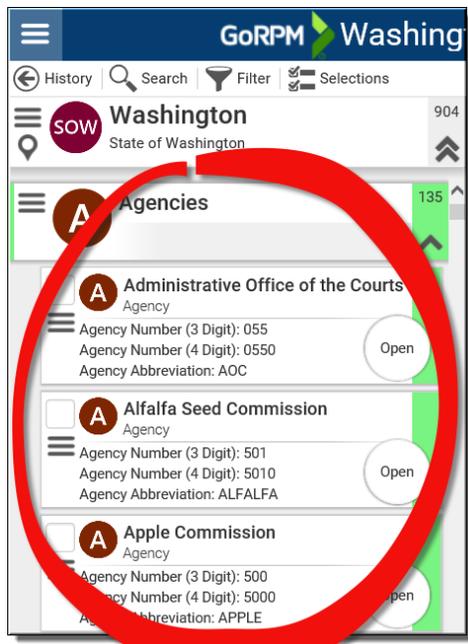
You may edit the attributes of selected Entities, or run reports against the selected items. Editing and reports are covered later.

6.3 Tile Lists- in Detail

In GoRPM, a **Tile** represents a single Entity. Individual Entities are visible as tiles in a list.

On the left of the **Data Explorer Context Header** area is a **Tile List**.

The **Tile List** contains Entities or data objects. Entities are things like agencies, facilities and lease contracts. The **Tile List** contains a set of tiles grouped by specific entity types, e.g., facilities. Shown below is a **Tile List**, circled in red.



In this example, the Entities (objects) shown are Agency Titles.

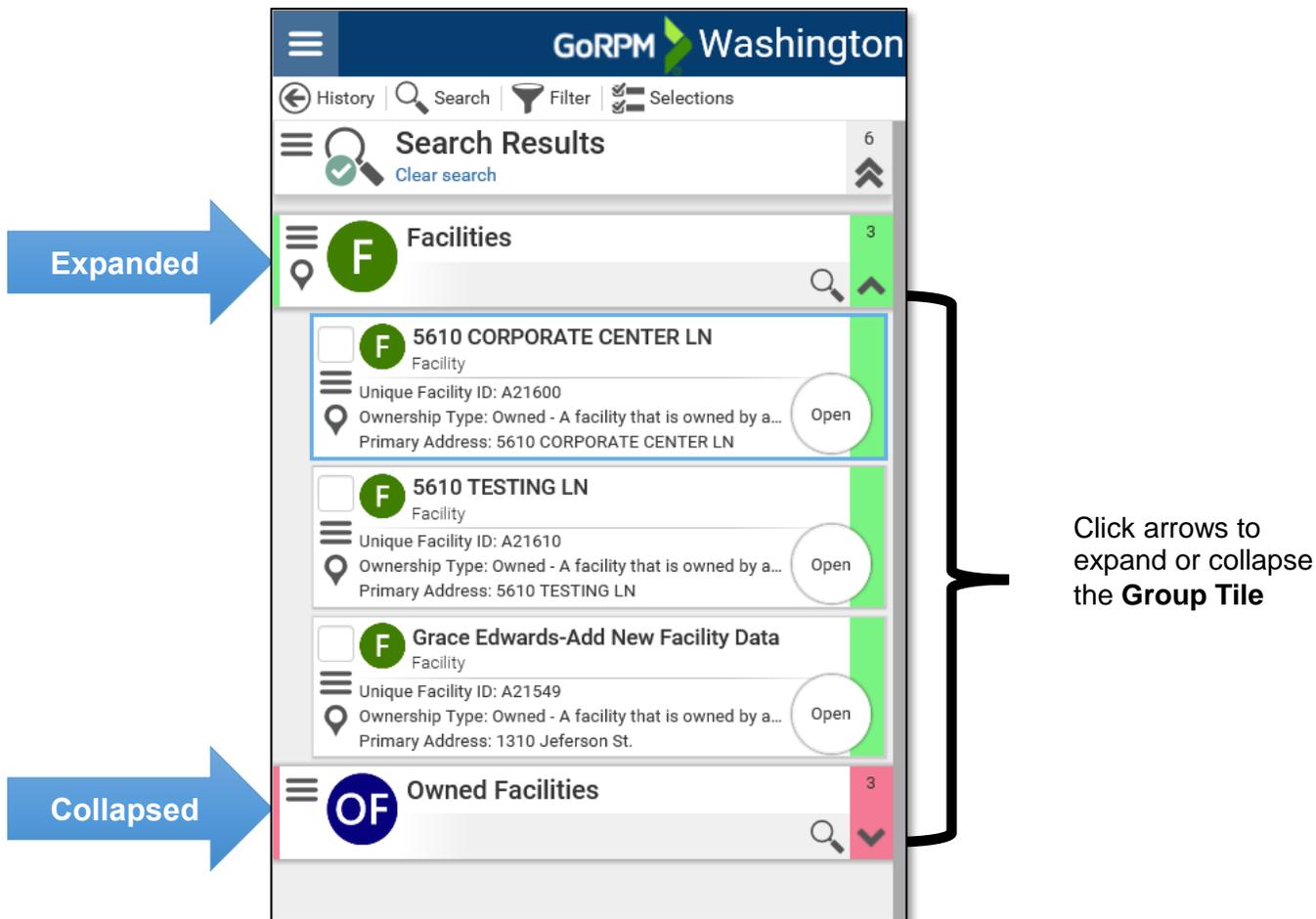
Similar types of Entities are clustered together under **Group Tiles**.

6.3.1 Group Tiles

Group Tiles cluster similar Entities in the **Tile List** (see Section 3.4 for information on Entities). **Group Tiles** are shown below.

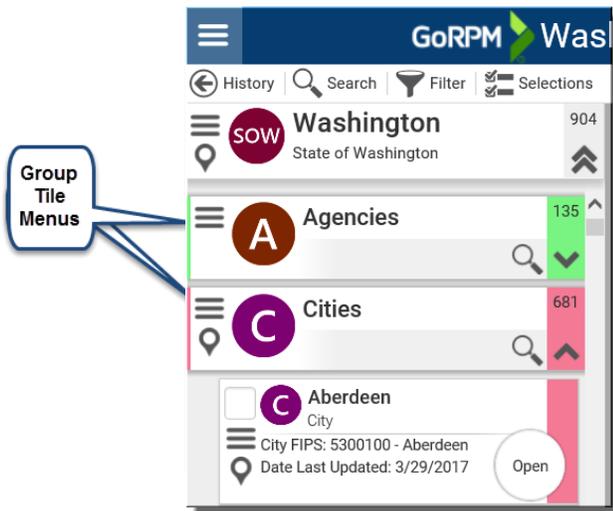


Group Tile **Expand** and **Collapse** buttons are shown below. Note the number in the upper right corner of the Tile, which indicates the number of entities within the group.



6.3.1.1 Group Tile Menu

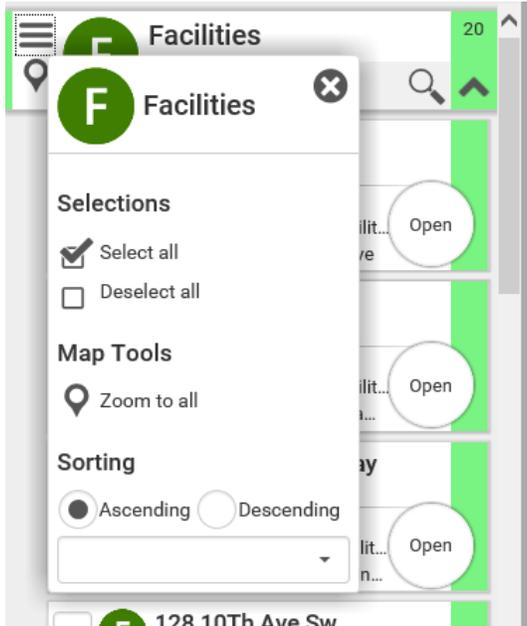
The **Group Tile Menu** buttons are shown in the image below.



Group Tile Menus provide access to: **Selections** choices, **Map Tools** and **Sorting**:



Group Tile Menu options are explained below:



Selections

- Select all** – select all Entities that belong to the group
- Deselect all** – deselect all Entities that belong to the group

Map Tools

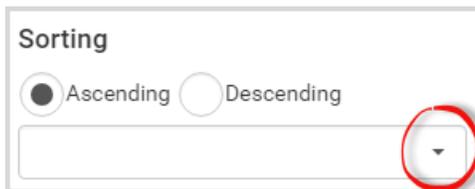
- Zoom to all** – zoom to all Entities that belong to the group

Sorting Entities by Attributes

Each Entity tile displays three attributes. The System Administrator sets the default attributes. In the example below, the attributes are Agency Number (3 Digit), Agency Number (4 Digit) and Agency Abbreviation.



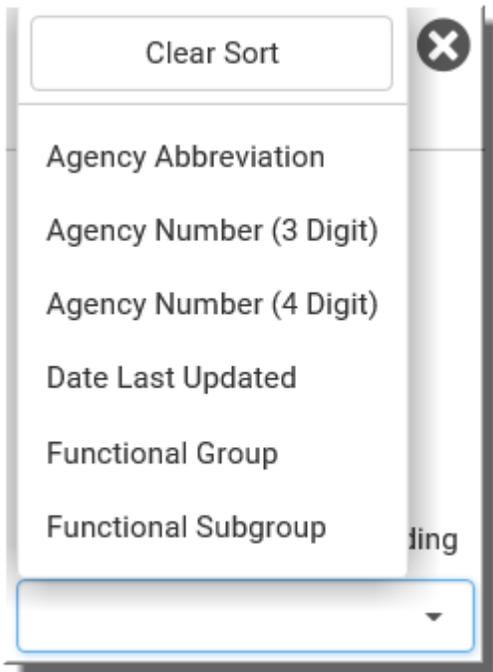
To sort, click either Ascending or Descending, and click the drop-down arrow:



Ascending - sort all attributes that belong to the group in ascending order

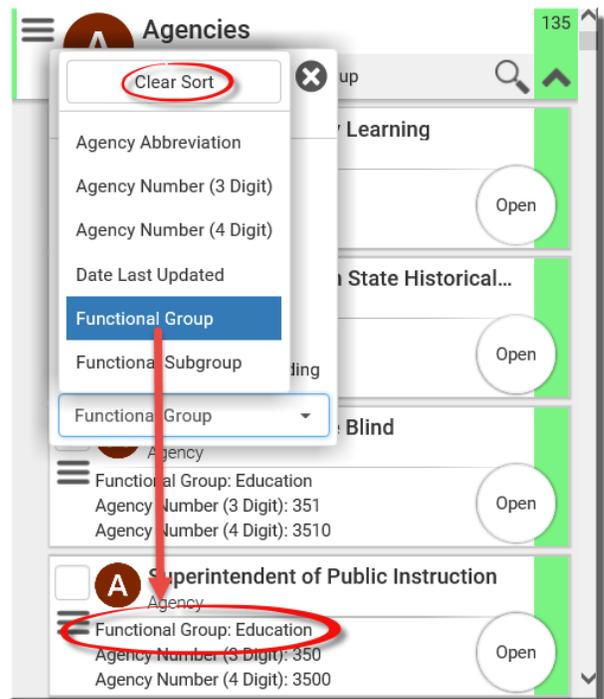
Descending - sort all attributes that belong to the group in descending order

A list of all available Attribute Types appears, as shown.



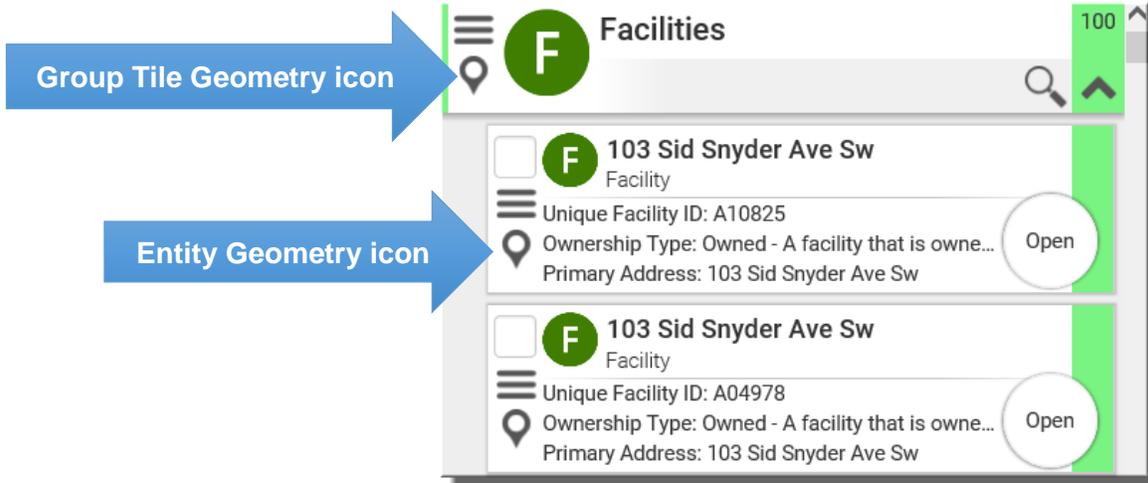
Click the desired attribute. The Entity tiles now appear in the order chosen, and with the chosen Attribute Type appearing first in the list of three attributes.

To revert to the original attribute sort order, click **Clear Sort** at the top of the sort list, shown circled in red.

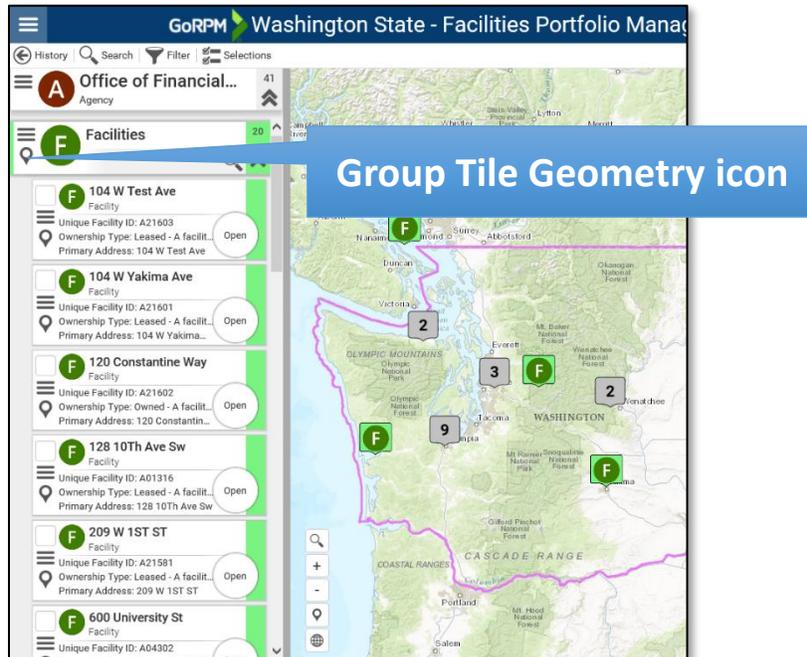


6.3.1.2 Group Tile Geometry Icon

The **Geometry** icon  lets you know that an Entity (or group of Entities) has a Geometry visible on the Map. Clicking the icon zooms to the selected entity's geometry.

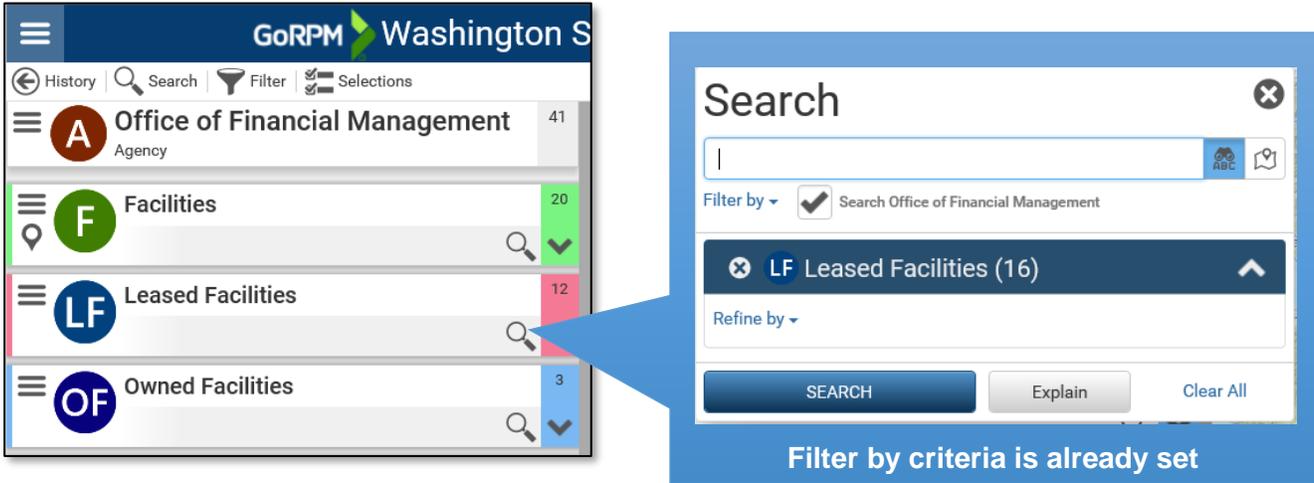


Click the icon to zoom to all the geometries on the map clustered under the **Group Tile**.



6.3.1.3 Group Tile Search

Group Tile Search - Clicking the **Group Tile Search** icon  starts a search *at the context of the Entity in the Group Tile*. In other words, it starts the search at the level you're in, with the group pre-selected.



6.3.2 The Tile – in Detail

Below are components of the Tile.



Open – Sets the context to the next level in the hierarchy, for example, moving from an agency to a facility.

Select Checkbox – Allows you to select the tile for viewing in the Selections area.

Tile Menu - Provides access to the **Data Menu** and details about the Entity.

Geometry Icon - When present, indicates that the Entity has geometry. Clicking the icon zooms to the Entity on the map.

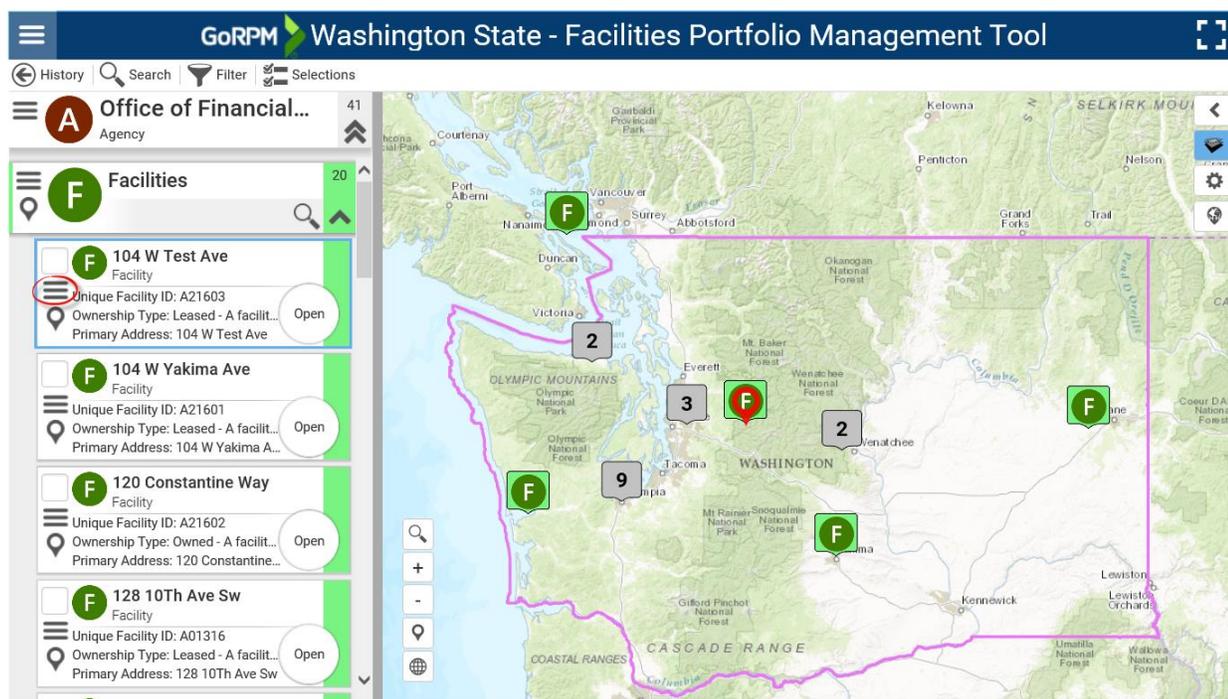
6.3.3 The Data Menu – in Detail

The **Data Menu** provides access to the Entity menu and details--options for accessing and working with your data. **Data Menu** choices are based on your permissions in FPMT.

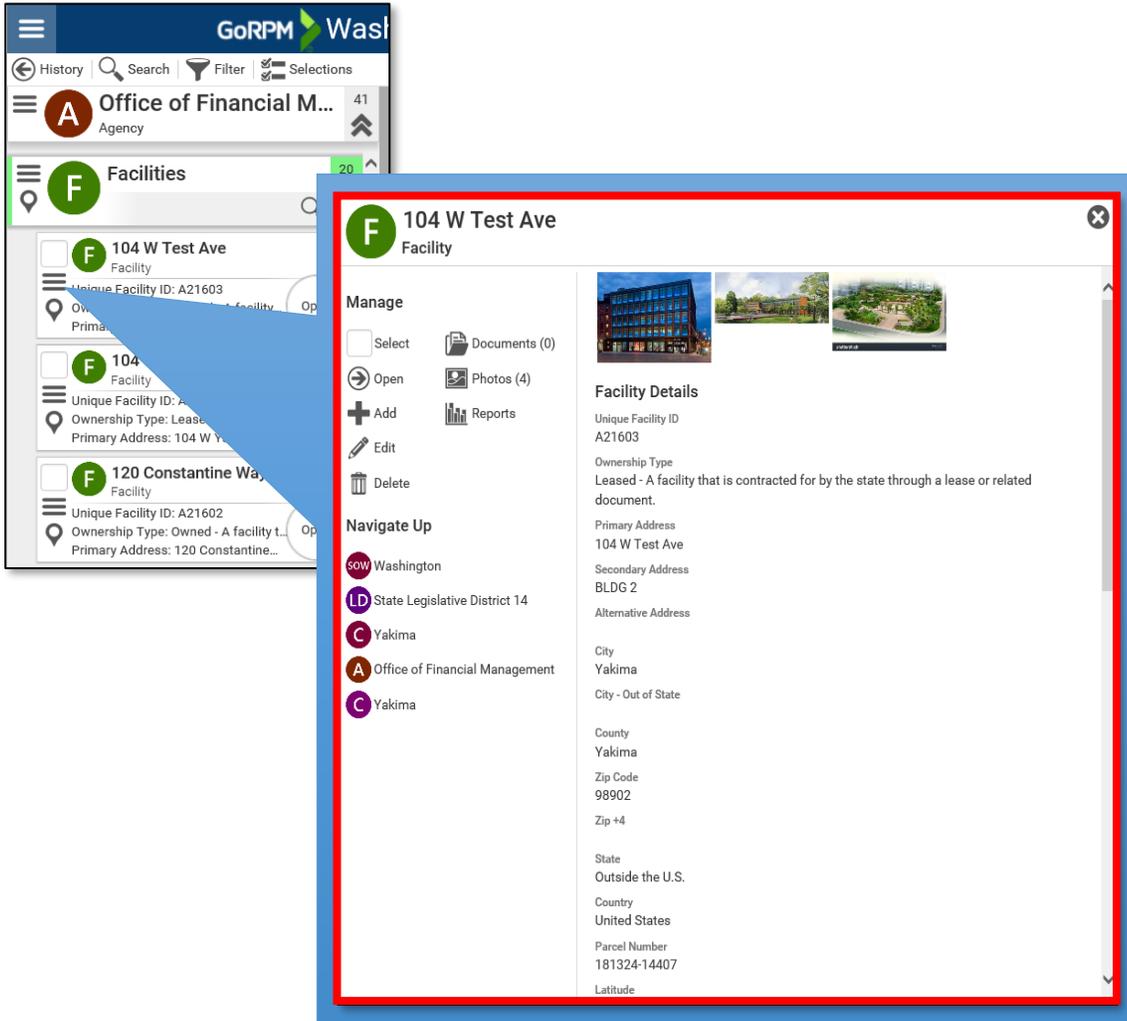
6.3.3.1 Access the Data Menu through the Tile List

The **Data Menu** can be accessed in two ways. One is by clicking the **Data Menu** button, circled in red on the **Tile List** below.

Note: Upon hovering your mouse over the **Data Menu** button, a red **Location** icon, corresponding to the Entity, appears on the map, as shown below.

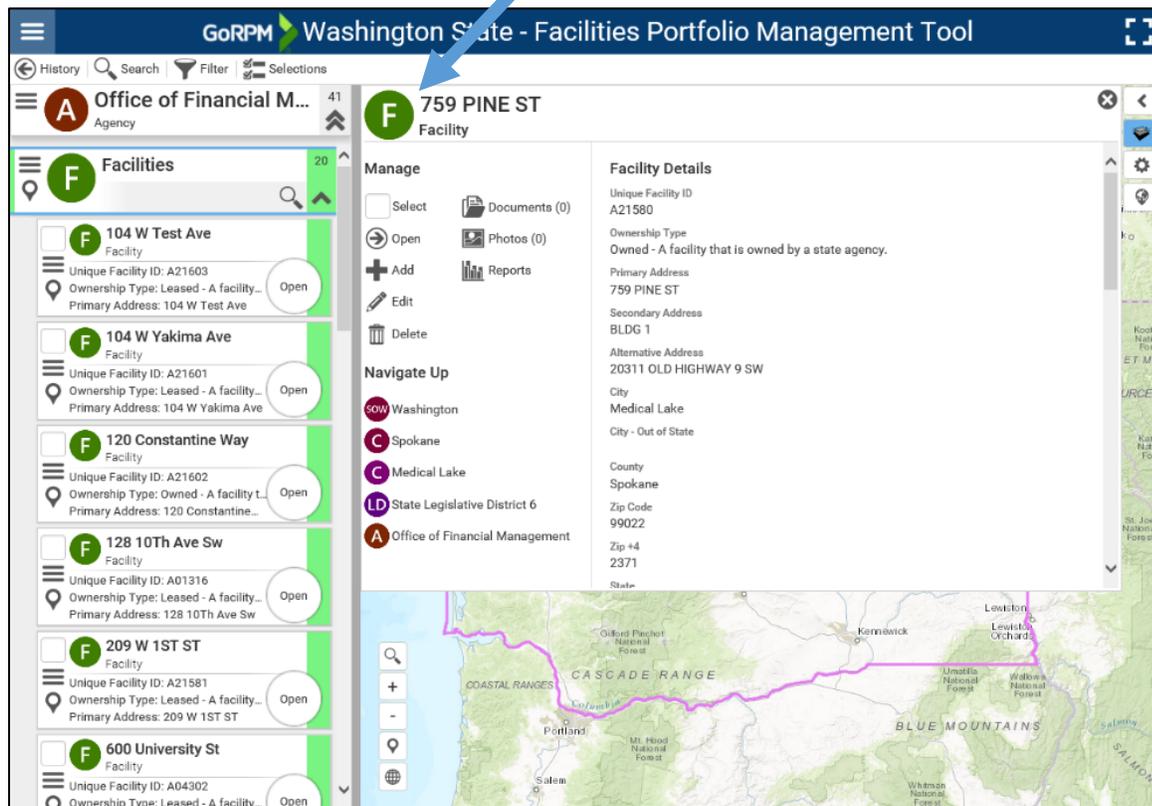
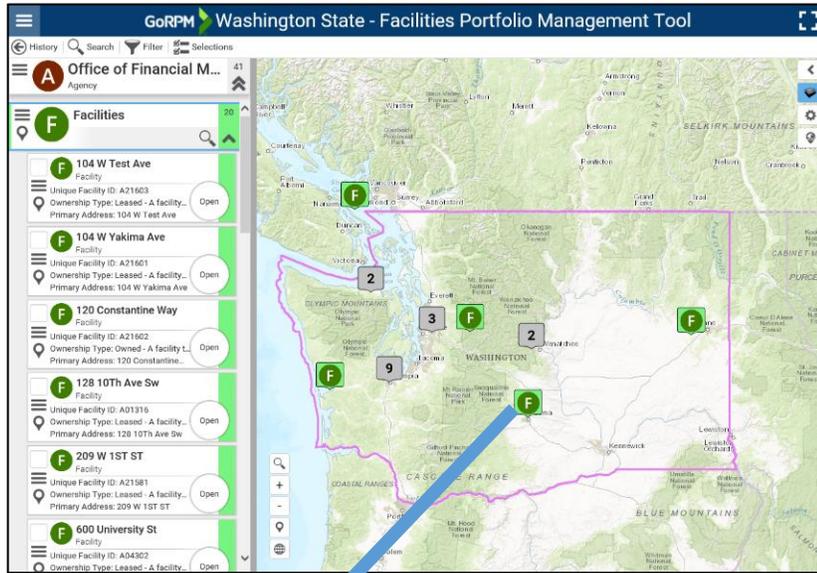


Upon clicking the **Data Menu** button, the **Data Menu** appears, as shown, outlined in red.



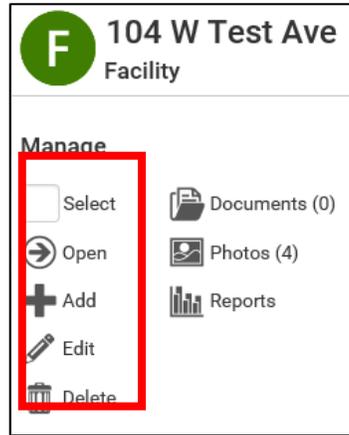
6.3.3.2 Access the Data Menu through the Map

To bring up the **Data Menu** via the map, click an **Entity Icon** on the map. The **Data Menu** for the corresponding entity appears, as shown.

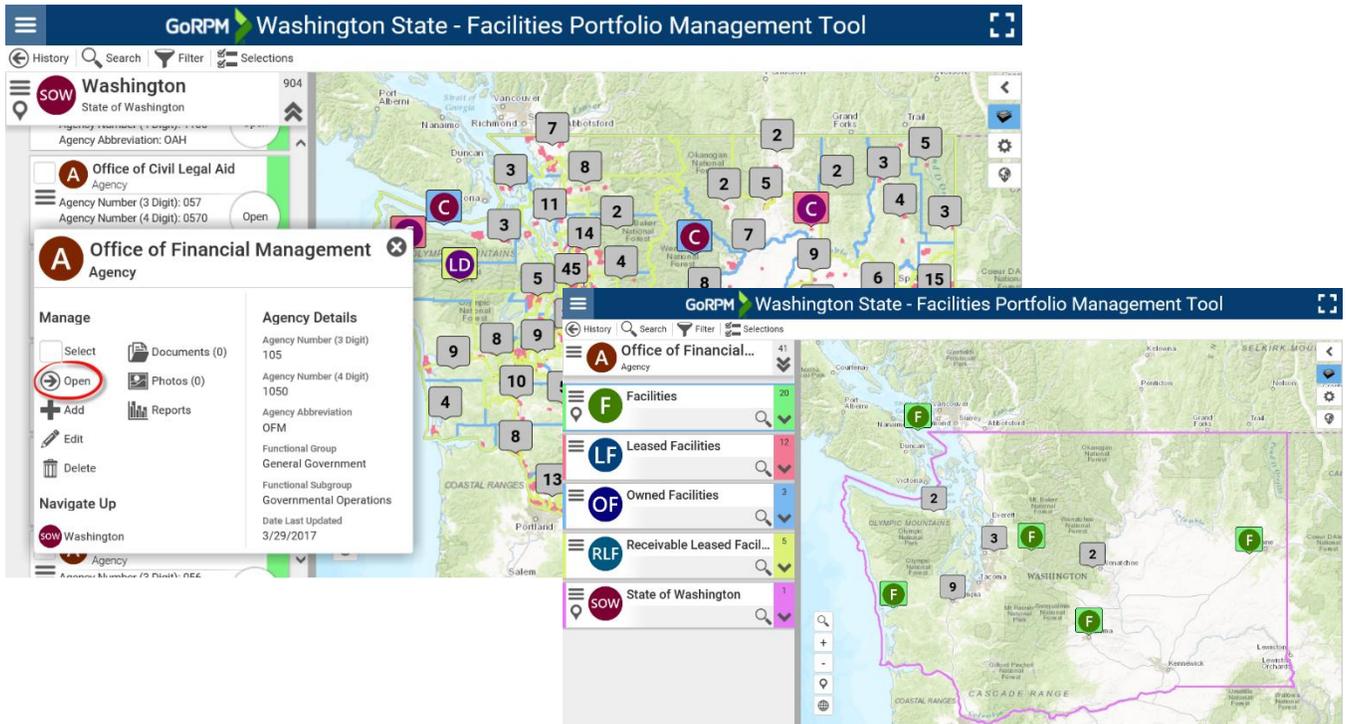


6.3.3.3 Data Menu Options

Under the **Manage** heading are “call-to-action” buttons—**Select**, **Open**, **Add**, **Edit** and **Delete**, outlined in red below. Their functions are explained briefly here, and in detail later.



- **Select** – A checkbox to add the Entity to your Selected Items.
- **Open** – Open the Entity and set the context to the *next* level in the hierarchy (Level 1 to level 2). For example, moving from an Agency (Level 1) to a Facility (Level 2), to a Leased Facility (Level 3). In the example below, upon clicking **Open** Office of Financial Management, Agency, the map displays twenty Facilities.



- **Add** – Add a new Entity related to the Entity
- **Edit** – Edit the Entity details (attributes)
- **Delete** – Delete the Entity (remove link to the parent Entity, or delete permanently)

Also under **Data Menu Manage** is access to **Documents**, **Photos** and **Reports**, outlined in red below.



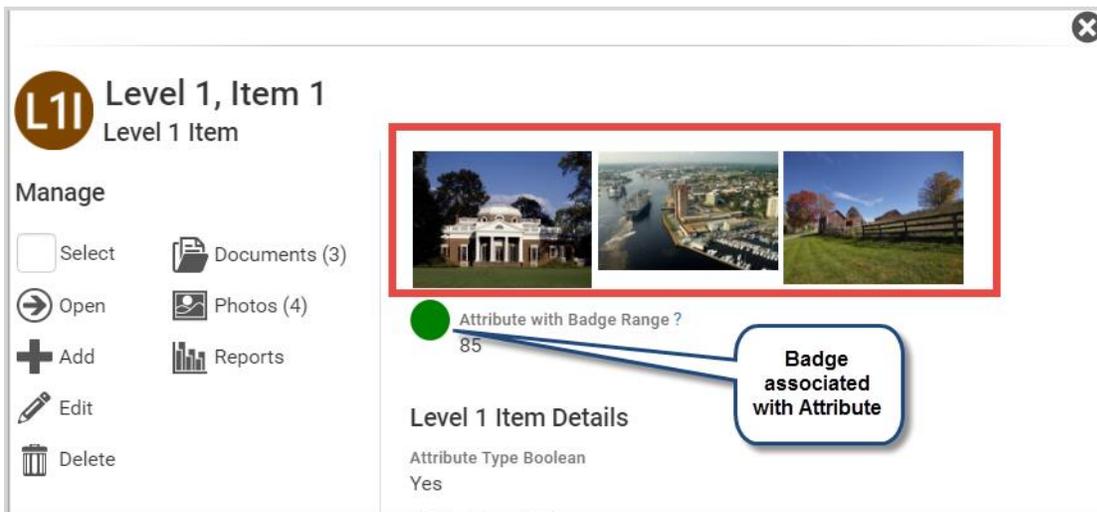
Documents - the total number of documents associated with the Entity is displayed.

Photos – the total number of photos associated with the Entity is displayed.

Reports – portal to access your organization’s reports, as well as standard reports such as Audit, Export, and Shapefile. Reports you have access to vary according to permissions the System Administrator sets. Contact your Administrator for assistance.

Working with documents, photos and reports is explained in detail later.

At the top of the **Data Menu**, the first three photos associated with the Entity are displayed, as shown outlined in red below.



Any Badges associated with attributes are displayed under the photo images. These are the same Badges viewable on the map.

In the **Details** section is attribute data for the Entity, shown outlined in red below.

F 104 W Test Ave Facility

Manage

- Select
- Documents (0)
- Open
- Photos (4)
- Add
- Reports
- Edit
- Delete

Navigate Up

- Washington
- State Legislative District 14
- Yakima
- Office of Financial Management
- Yakima



Facility Details

Unique Facility ID
A21603

Ownership Type
Leased - A facility that is contracted for by the state through a lease or related document.

Primary Address
104 W Test Ave

Secondary Address
BLDG 2

Alternative Address

City
Yakima

City - Out of State

County
Yakima

Zip Code
98902

Zip +4

State
Outside the U.S.

Country
United States

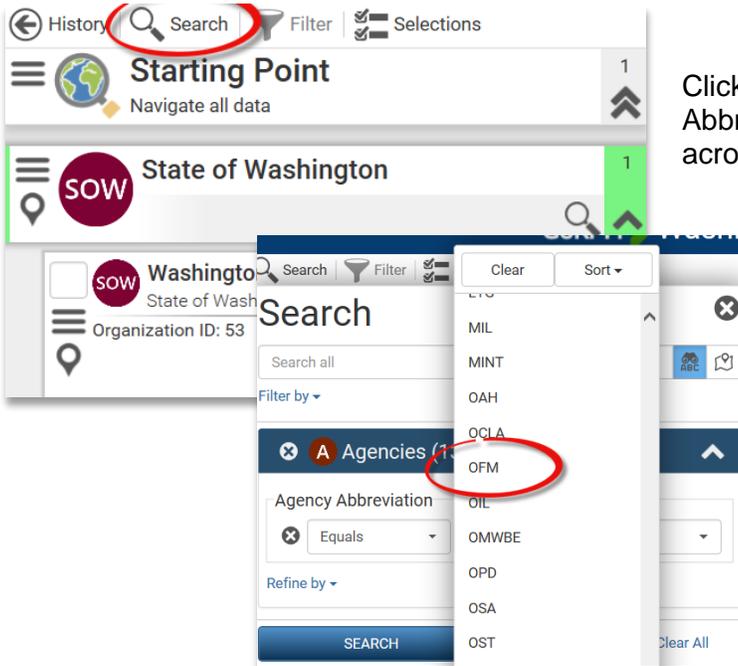
Parcel Number
181324-14407

Latitude

6.4 Navigate to Your Agency

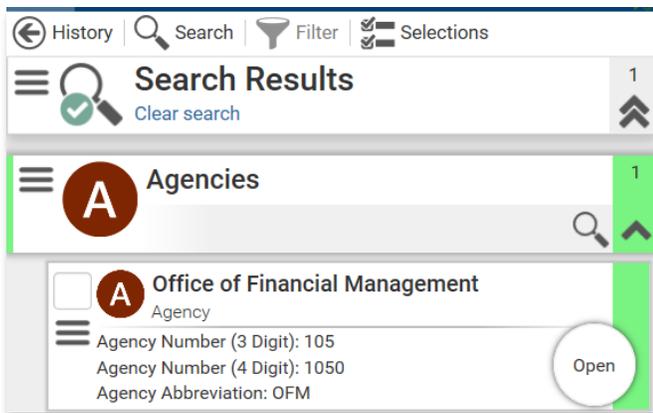
Data Explorer will open at the State of Washington level. To find your agency click on **Search** above the **Starting Point** tile.

Click **Filter by** and select **Agency**



Click **Refine by** and select the identifier. Agency Abbreviation is used in this example. Select the acronym from the drop down list.

Click **Search**.



The **tile menu** will return the agency tile.

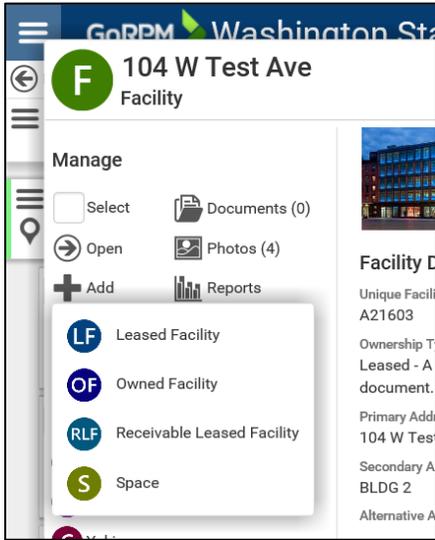
Click **Open** to view your agency and all related data.

6.5 Add an Entity

If your permissions allow, you can **Add** an Entity. The **Add** function can be accessed in two ways. One is from the **Data Menu**.

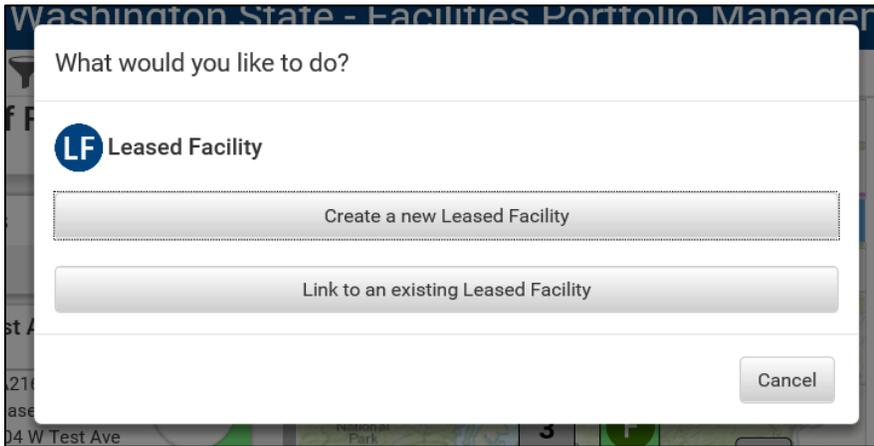
Click **Add**.

Based on the current navigation context, a list appears with the types of entities you can add, as shown below.



Choose an Entity from the list.

Upon selecting an Entity to add, a dialog box appears, as shown.



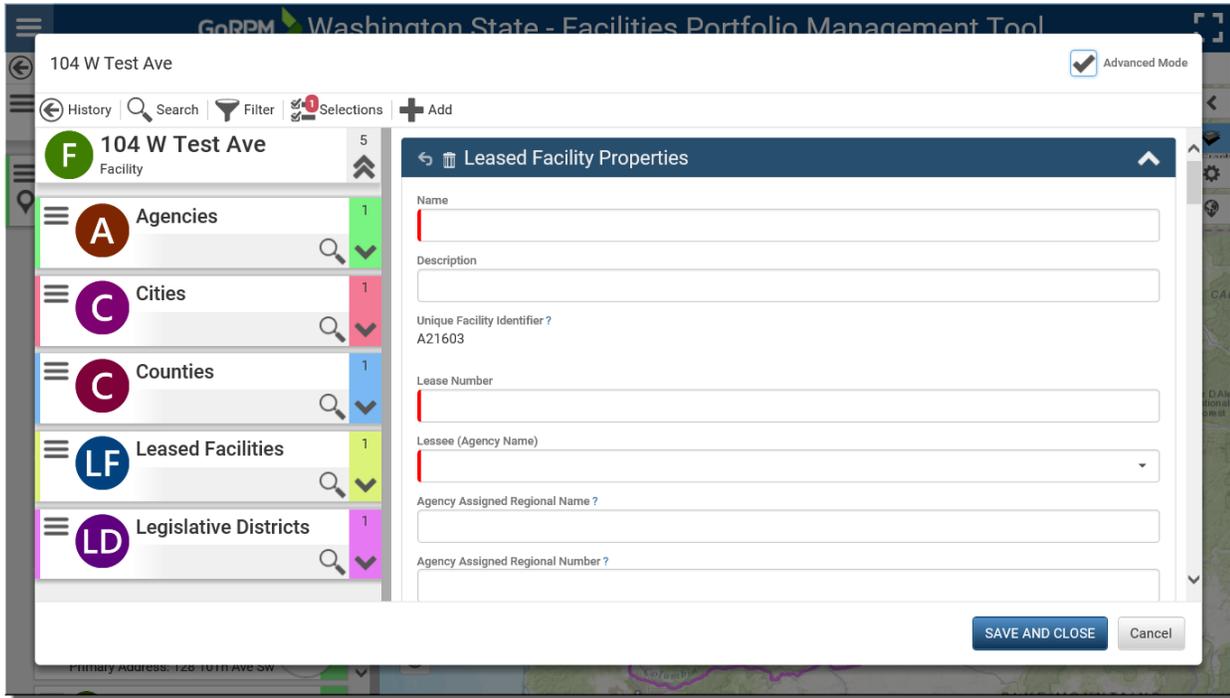
Two options exist:

1. **Create a new** – create a new entity and fill in associated attributes.
2. **Link to an existing** – create a relationship between two entities without creating a new entity.

If you link to an existing item, you create a relationship with that item. For example, if you have a list of lease facilities and want to add them to an existing lease contract, you can link to an existing lease facility, rather than create a new one.

Click “Create a new...Item.” A list of items related to your current selection appears in the Tile list, and the desired Item is selected.

Enter data in the Properties section. Click **SAVE AND CLOSE** when finished.

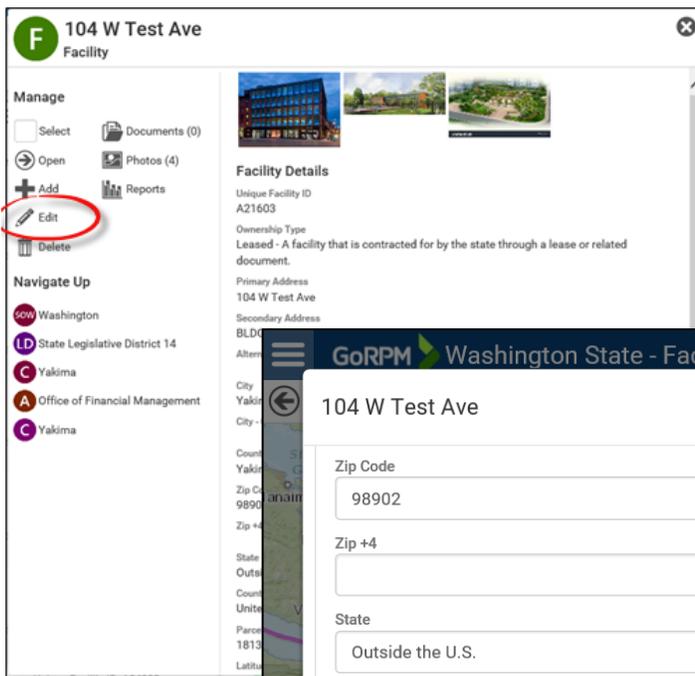


6.6 Edit Entity Properties

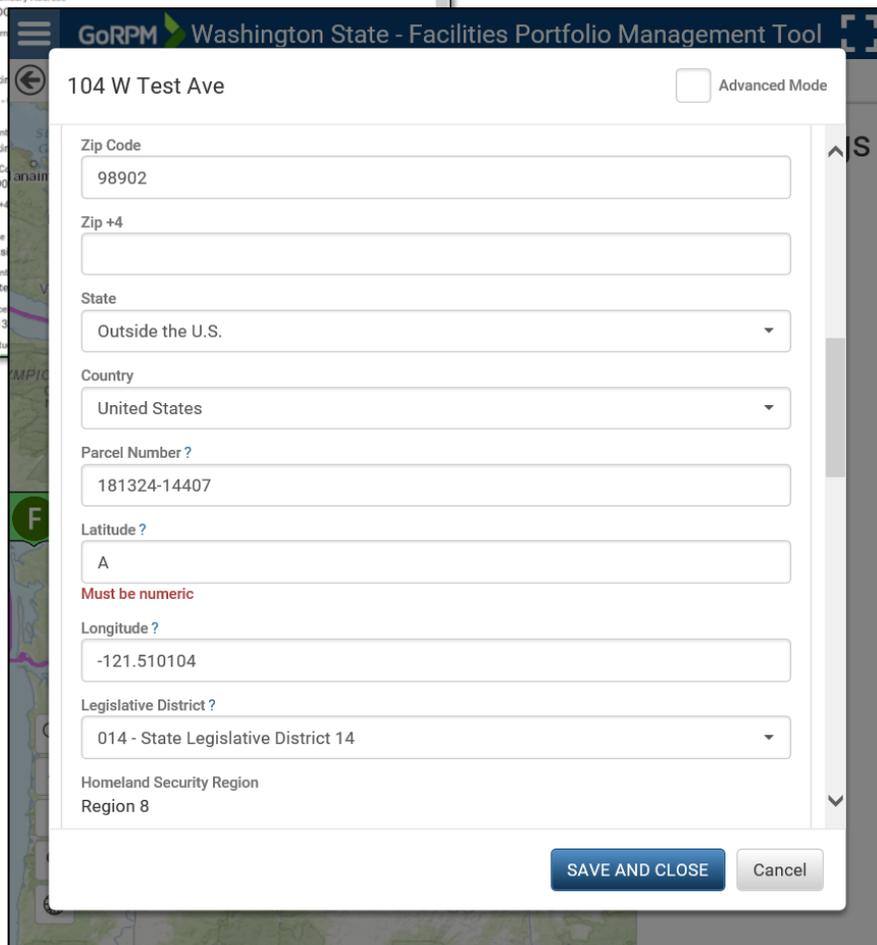
The ability to edit Entity properties is controlled by your permissions in GoRPM.

6.6.1 Editing Overview

To edit Entity properties, click the **Edit** option on the **Data Menu**, as shown circled in red.

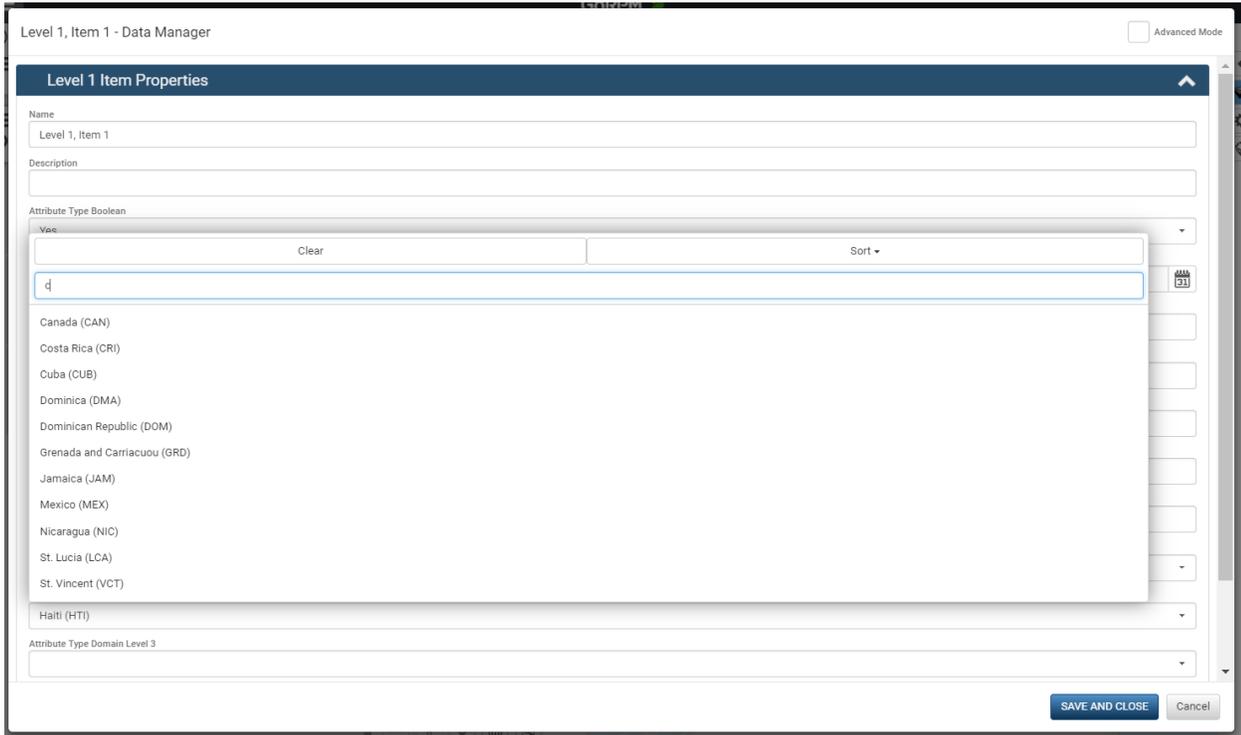


A **Data Edit** window appears, as shown below.



Select the appropriate data in the fields with the drop-down arrows, and type appropriate details in the free-form text boxes.

In the example below, entering the letter “c” filters three words beginning with “c,” followed by other words containing the letter “c” in the results.



If you enter text that is incompatible with the built-in parameters, you receive an Attribute validation error. Any Attribute validation error displays a red warning message below the Attribute, as shown below.

The screenshot shows a web form titled "GoRPM Washington State - Facilities Portfolio Management Tool" for the address "104 W Test Ave". The form includes fields for Zip Code (98902), Zip +4, State (Outside the U.S.), Country (United States), Parcel Number (181324-14407), Latitude (A), Longitude (-121.510104), Legislative District (014 - State Legislative District 14), and Homeland Security Region (Region 8). A red circle highlights the Latitude field, which contains the letter "A". Below the field, a red error message reads "Must be numeric". A blue callout box points to the field with the text "Example warning message for a letter entered where a number is expected". At the bottom of the form, the "SAVE AND CLOSE" button is circled in red.

Once you have completed editing data fields, click **SAVE AND CLOSE** to save your changes.

Note: You cannot save if validation errors are present.

6.6.2 Edit Geometry Associated with an Entity

To edit the geometry associated with an Entity, click the **Edit Geometry** button.

1018 Capitol Way S - Data Manager Advanced Mode

Facilities Inventory System [?](#)
Yes

Facility Status
Pending Approval

Active Date [?](#)

Inactive Date [?](#)

OFM Validation Date [?](#)
[Calendar icon] 31

HRMS [?](#)
No

Comment

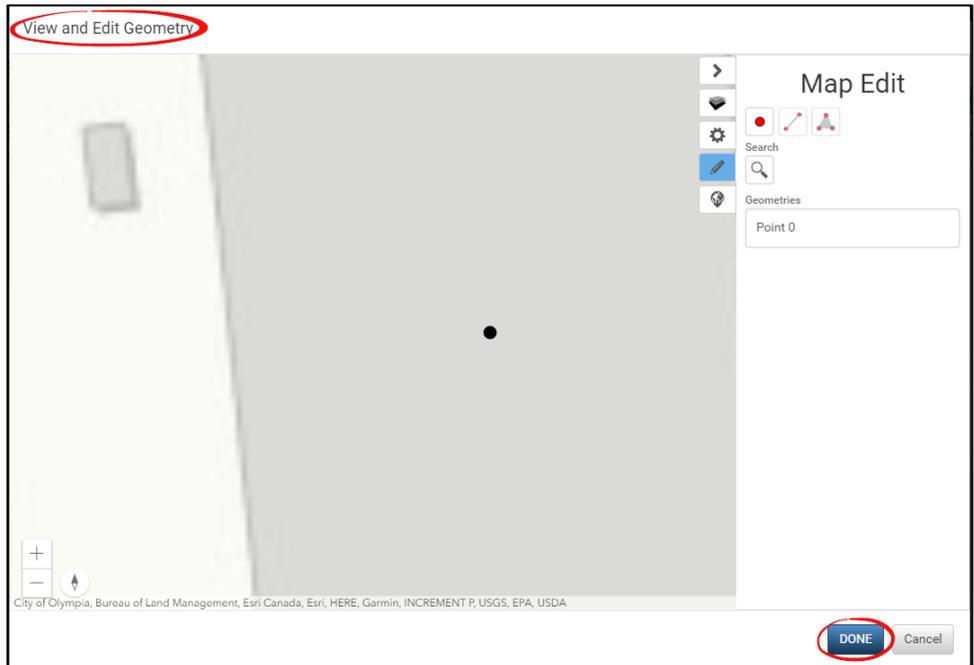
Date Last Updated
4/10/2019

Edit Geometry

SAVE AND CLOSE Cancel

The **View and Edit Geometry** screen appears, as shown. How to edit the map is covered in detail in the next section.

Add or edit geometry as desired, and click **Done**.



You are returned to the **Data Edit** window.

1018 Capitol Way S - Data Manager Advanced Mode

Facilities Inventory System [?](#)
Yes

Facility Status
Pending Approval

Active Date [?](#)

Inactive Date [?](#)

OFM Validation Date [?](#)
 

HRMS [?](#)
No

Comment

Date Last Updated
4/10/2019

Make sure to click the **SAVE AND CLOSE** button on the edit window to commit your changes.

6.6.2.1 Edit the Geometry

Click **Edit Geometry** on the **Data Edit** window.

1018 Capitol Way S - Data Manager Advanced Mode

Facilities Inventory System [?](#)
Yes

Facility Status
Pending Approval

Active Date [?](#)

Inactive Date [?](#)

OFM Validation Date [?](#)
[Calendar icon] 31

HRMS [?](#)
No

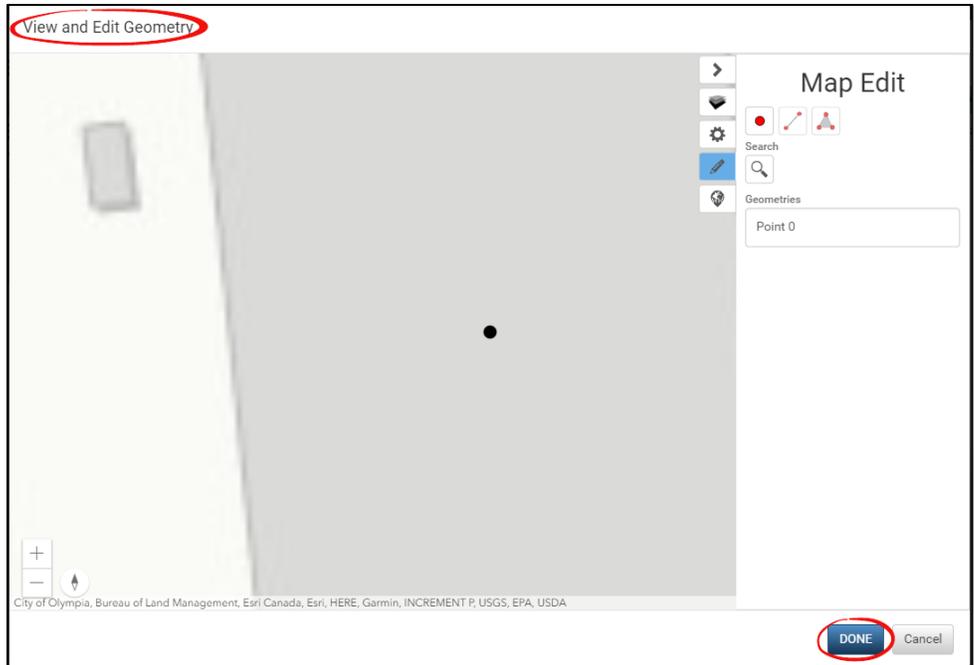
Comment

Date Last Updated
4/10/2019

Edit Geometry

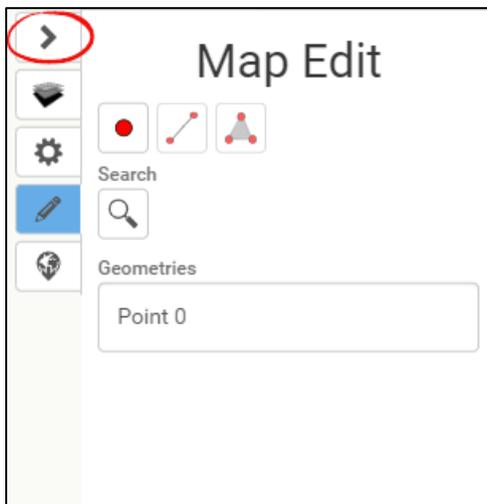
SAVE AND CLOSE Cancel

The **View and Edit Geometry** window appears, as shown.



By default, the **Map Edit Slide Out** menu in the upper right corner is open. Click the **Slide Right** button, shown circled in red below, to close the menu, and vice versa.

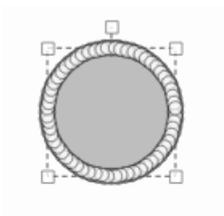
By default, the **Edit** button, highlighted in blue below, is active.



6.6.2.2 Map Drawing Basics

You can add map elements, edit their properties, size, position, and appearance, and arrange them on the page with other map elements.

- While drawing with two shapes, Draw Polyline and Draw Polygon the **Finish Drawing** and **Cancel Drawing** buttons are active.
- Use your cursor and left mouse button to manipulate (move up, down, left or right) the map and elements on the map.
- Use your mouse scroll wheel to zoom in and out.
- Double click to select objects on the map.
- Three points are required to create a polygon.
- To resize an image, double click the graphic. Selection handles appear on the edges of the image, as shown below. Click the handles and move outward to enlarge, or move inward to shrink.

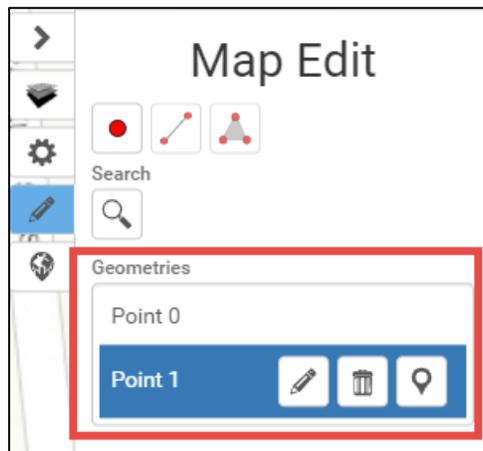


6.6.2.3 Geometries List

Upon drawing on the map or upon clicking the Place Point button next to the **Search** box, a new polygon or point, appears in the **Geometries** list, as shown circled in red below.

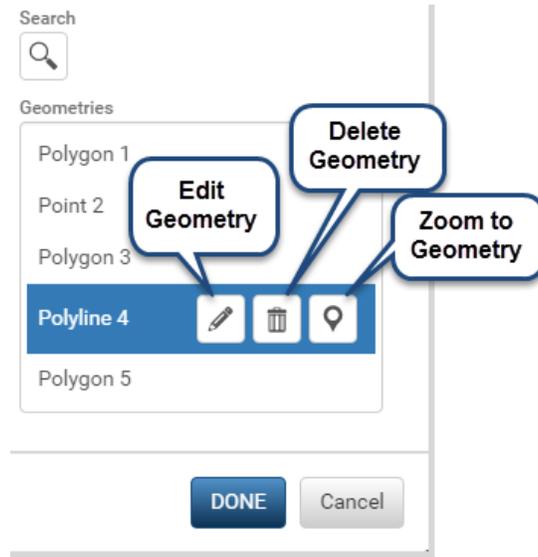


Each object you draw on the map is added to the **Geometries** list, as shown below, outlined in red.



Each object can be edited, deleted or zoomed in on.

A shape object has to be selected, either on the map or in the Geometries list, to delete it. Upon being added to the Geometries list, you have the ability to **Edit Geometry**, **Delete Geometry** or **Zoom to Geometry**, as shown below.



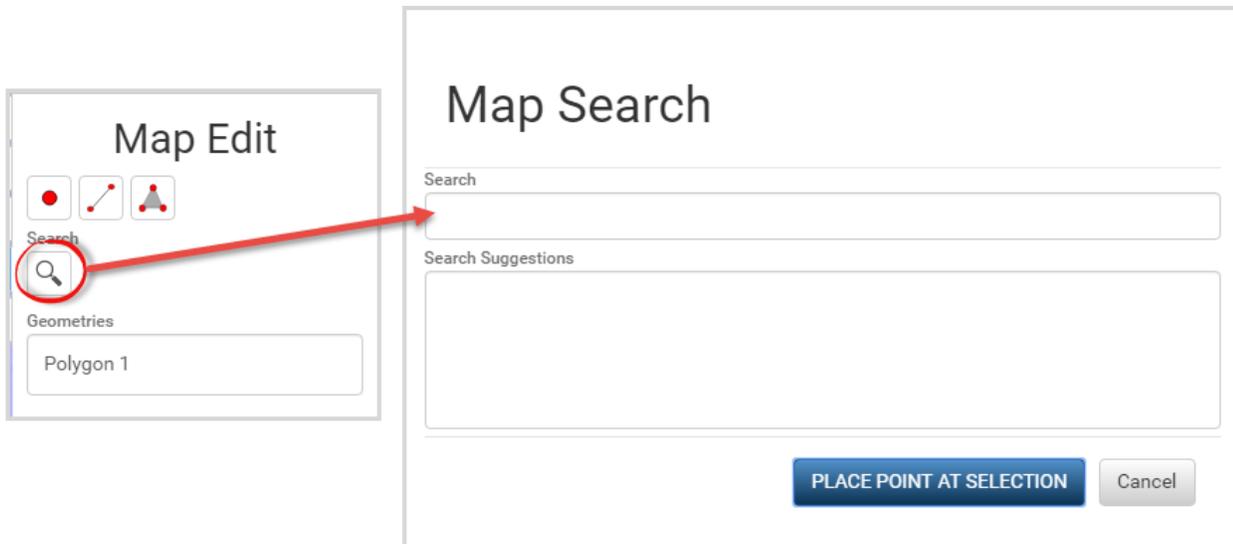
Click the main **Cancel** button at the bottom right of the window to disregard any edits to the geometry, and to return to the previous window.

6.6.2.4 Add an Address or Location as a Point

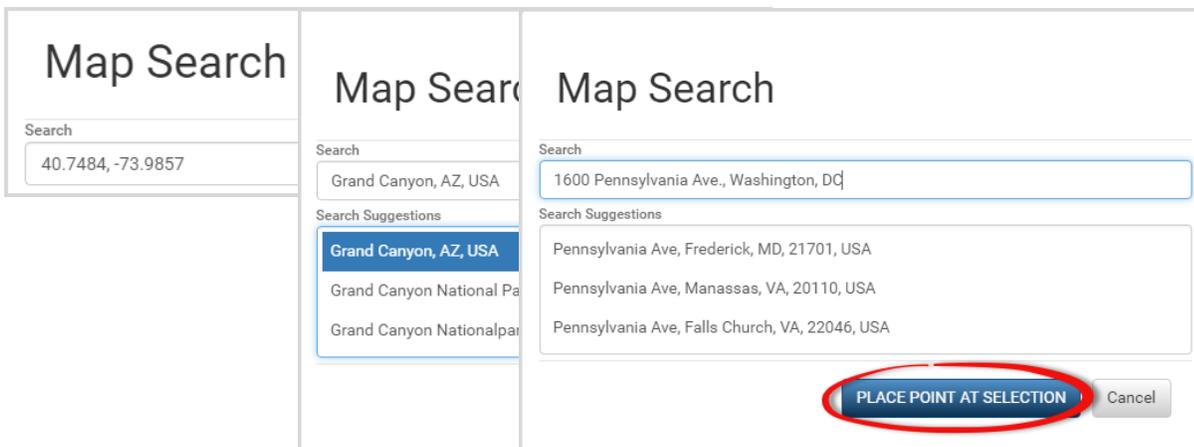
The process of representing a description of a location (i.e., coordinates, an address, or a name of a place) as a location on the earth's surface, is called Geocoding.

Click the **Search** button on the Map Edit menu. Enter a set of latitude/longitude coordinates, a geographic location, or a street address in the **Search** box to place a point on the map.

A geographic location is a place of interest or a landmark. For example, a river, a park, a town, or a tourist attraction.



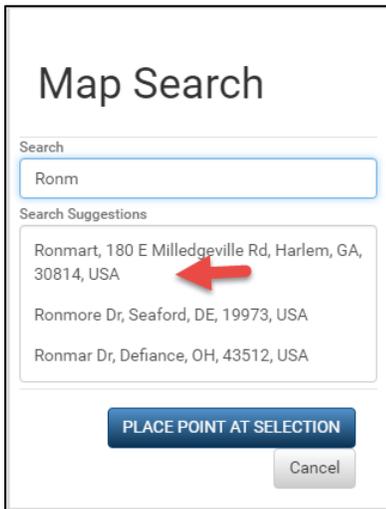
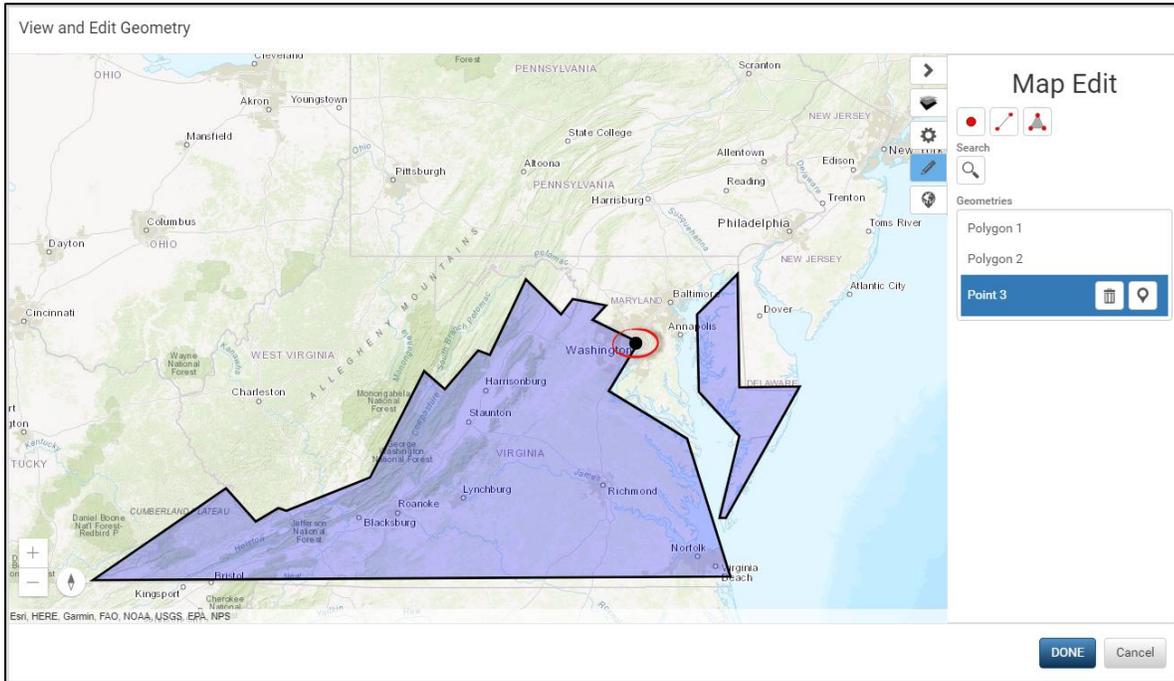
Examples of a latitude/longitude, a geographic location, and a street address Map Search are shown below.



Click **Place Point At Selection** to view the results on the map.

Note: To search by XY coordinates, enter the actual latitude and longitude ($\pm 90^\circ$ and $\pm 180^\circ$ respectively) not the decimal degree format (40.7484° N, 73.9857° W).

The Map Search Point for 1600 Pennsylvania Ave. NW, Washington, D.C. is shown circled in red below.



Note: For long text, the search suggestion results wrap.

Note: The agency should ensure that the point is located on the correct facility before saving the location.

6.6.2.5 Move a Point to Another Location on the Map

To move a map point, click the point.

Upon clicking, the point appears with a red outline, and becomes movable (the point is only movable when outlined in red).



Simply drag the point to the desired position on the map and release the mouse button. The point is shown below, moved from Washington, DC to Richmond, VA.

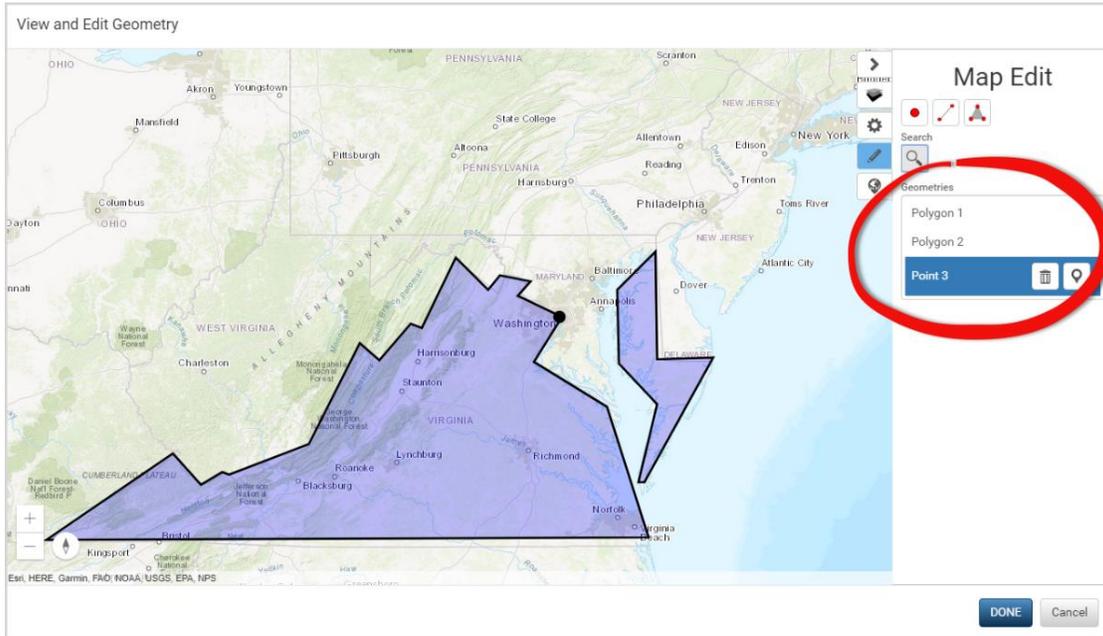


Upon releasing the mouse button, the map point appears as a black circle.

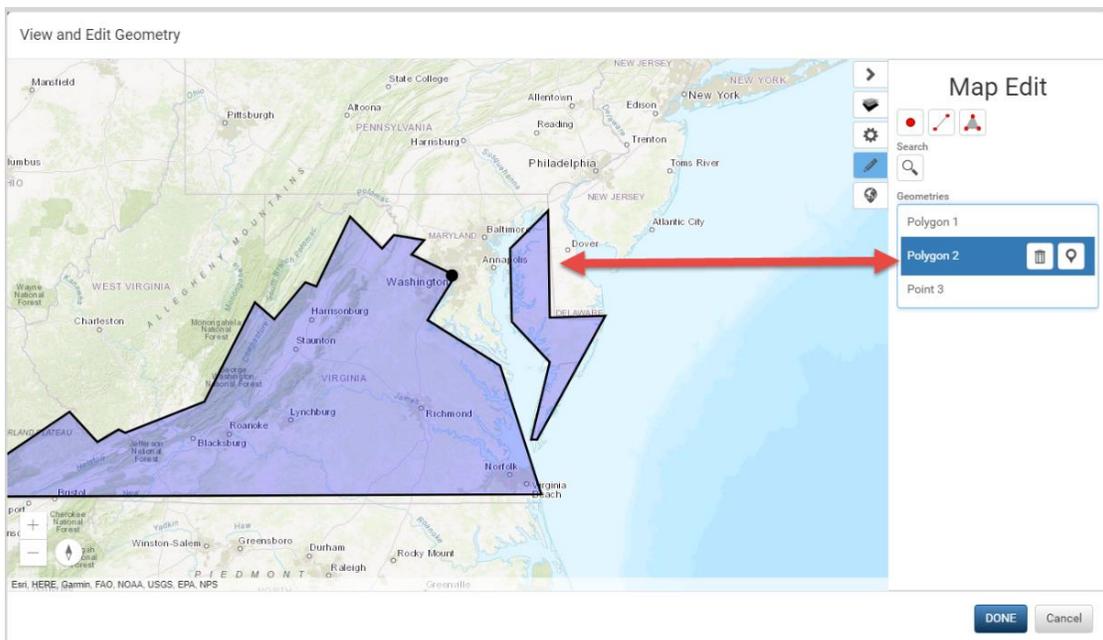


6.6.2.6 Delete a Point or Geometry on the Map

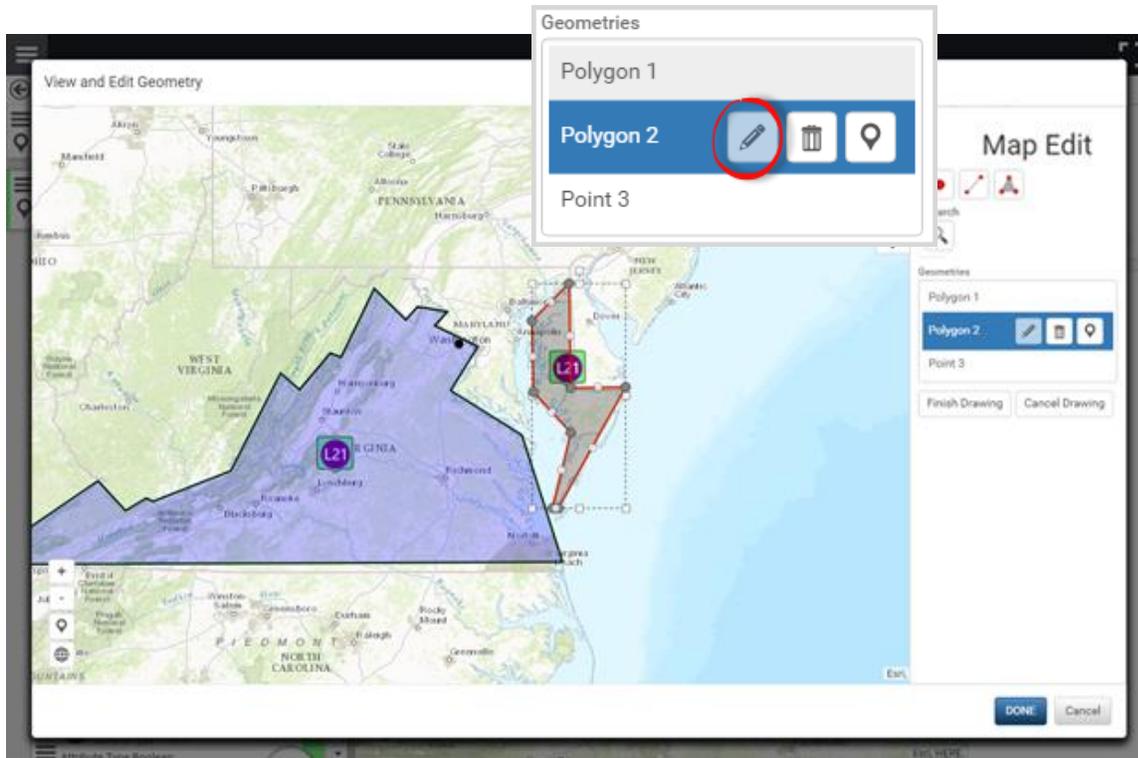
You can easily delete points and geometry on the map. Navigate to the **View and Edit Geometry** window (see Section 6.5.2.1 for instructions on navigating to this window). The example below shows two geometries, listed as “Polygon 1” and “Polygon 2” and “Point 3.” When you first open the **Edit Geometry** window, no geometries are selected, and all the geometries are centered within the map view.



Upon clicking a polygon in the list, the map shifts to center the selected geometry. In the example below, the map shifted to center Polygon 2 upon selection in the Geometries list.

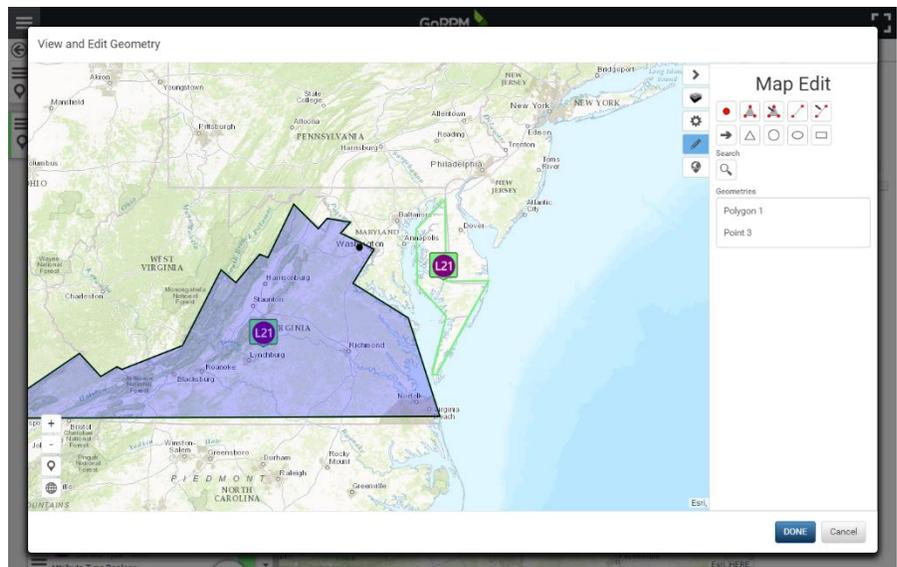


If the map displays multiple geometries, click the **Edit** button to make a geometry distinguishable from others. Upon clicking the **Edit** button, the geometry is selected and appears with a red border, as shown below.



Note: You can also click the geometry shape on the map to make it active.

Once active/highlighted in red, click the **Delete** button associated with the geometry. The geometry is removed from the map, as shown.



6.6.2.7 List of Map Editing Tools

Tools available and their function/description are listed in the table below.

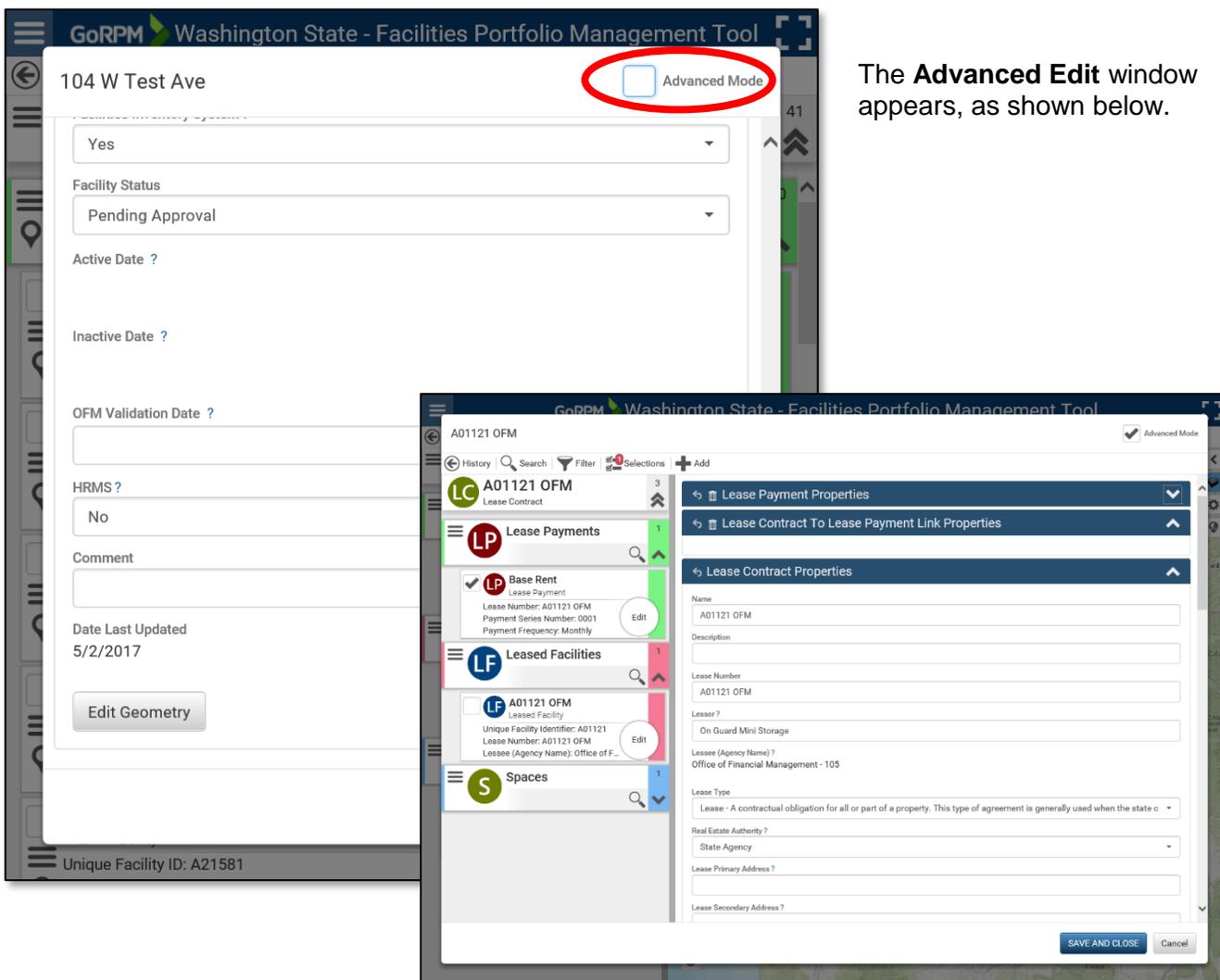
Map Tool Image	Map Tool Name	Function/Description
	Place Point	<p>1. A single x,y coordinate that represents a geographic feature too small to be displayed as a line or area; for example, the location of a mountain peak or a building location on a small-scale map.</p> <p>2. A coverage feature class used to represent point features or to identify polygons. It is not possible to have point and polygon features in the same coverage. When representing point features, the x,y location of the label point describes the location of the feature. When identifying polygons, the label point can be located anywhere within the polygon.</p>
	Draw Polygon	Draw a plane figure with at least three straight sides and angles, and typically five or more.
	Draw Polyline	Draw a connected sequence of line segments
	Finish (Drawing)	While drawing with Draw Polyline and Draw Polygon, the Finish button is active.
	Cancel (Drawing)	While drawing with Draw Polyline and Draw Polygon, the Cancel button is active.
	Delete Geometry	Delete the most recent geometry drawn
	Zoom to Geometry	Enlarge the geometry drawn

6.6.3 Advanced Edit

While the Edit mode allows you to edit the current entity, **Advanced Edit** mode allows you to:

- Edit the relationship between the current entity and related entities.
- Edit the related Entity attributes.
- Edit an attribute for multiple entities at the same time.
- Edit the attribute of the current selected Entity.
- Remove the link between the currently selected Entity and a related Entity or Entities.
- Allows you to add a new related Entity, or link to a related Entity.
- Edit attributes on the relationship between two Entities.

Click the **Advanced Mode** checkbox on the **Data Manager** window.

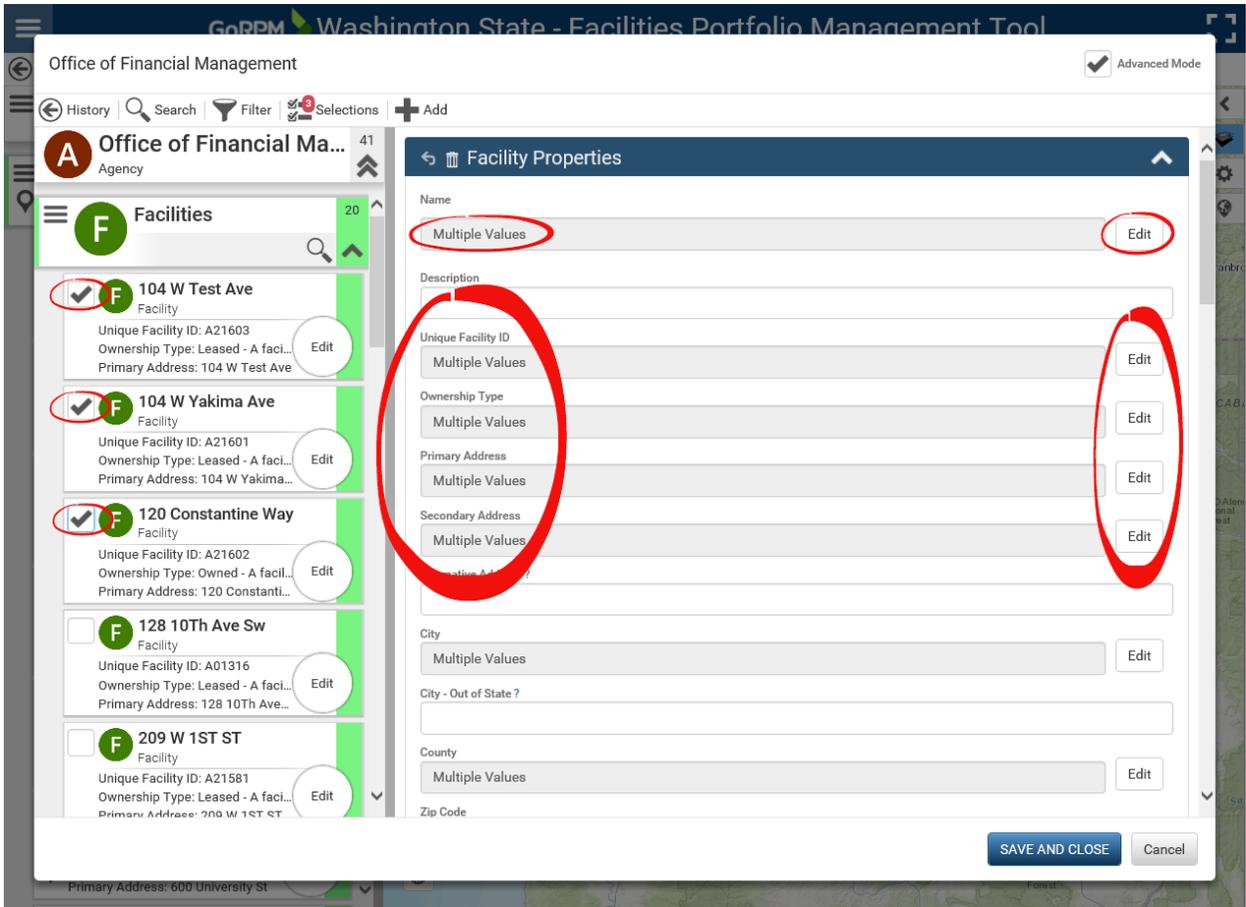


The **Advanced Edit** window appears, as shown below.

6.6.3.1 Multi-Edit the Value of Attributes

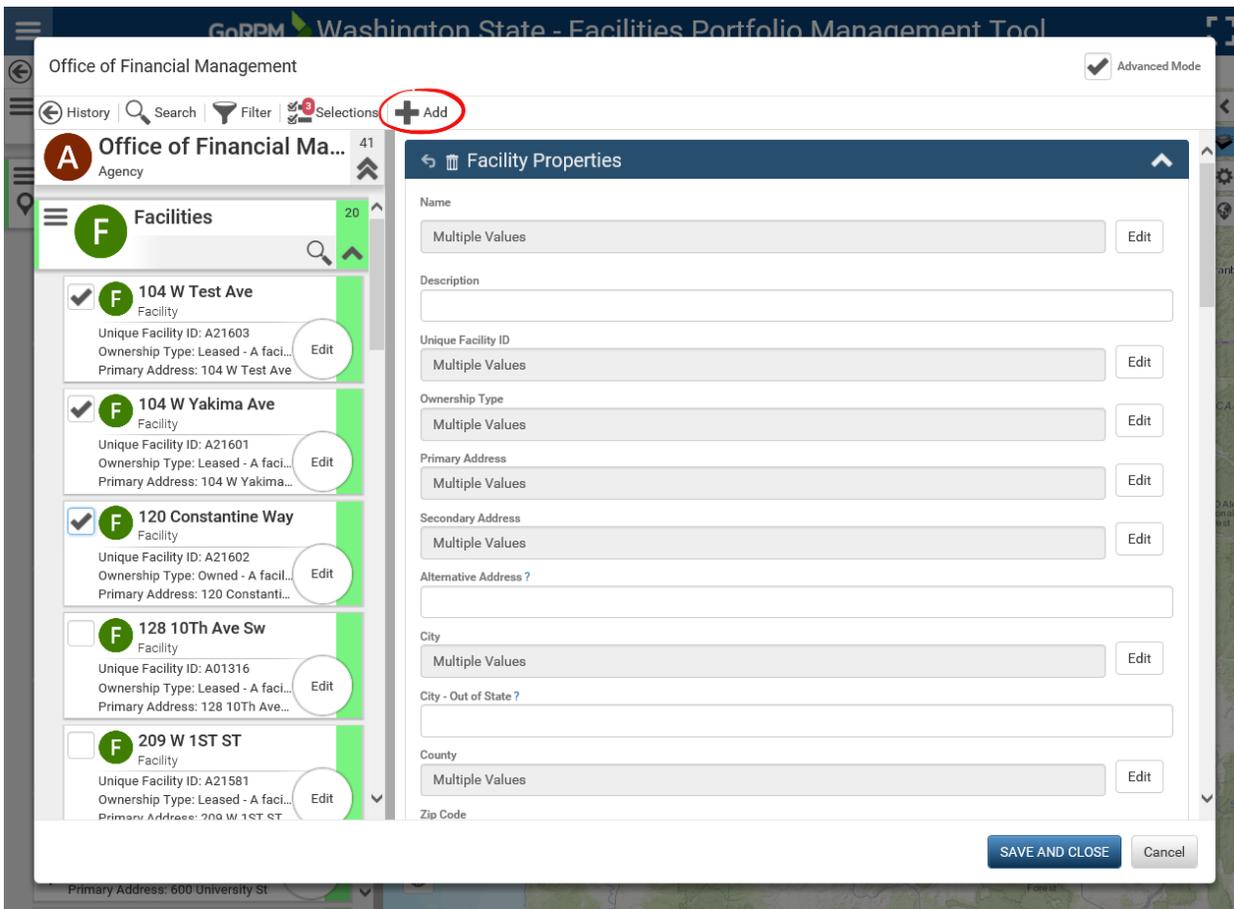
If you select more than one related Entity, you can multi-edit the value of Attributes. For example, you may want to edit an occupant description for three rooms associated with a floor, but edit all three same rooms at the same time.

As shown below, two Entities in the **Tile List** are selected. Attributes with “Multiple Values” are available to edit, as shown.



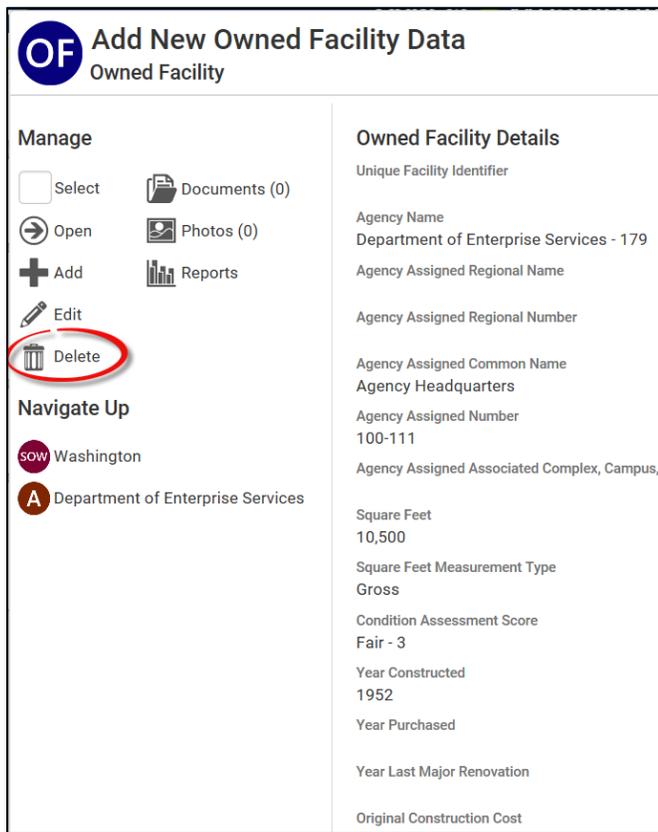
6.6.3.2 Add New Entity from the Advanced Edit

The **Data Manager** window also provides access to the **Add** button, as shown, allowing you to add a new Entity. This is the same **Add** button available on the **Data Menu**. Refer to [Section 6.3.3](#) for instructions on adding an Entity.



6.7 Delete an Entity

To delete an Entity, click the **Delete** icon, shown circled in red below

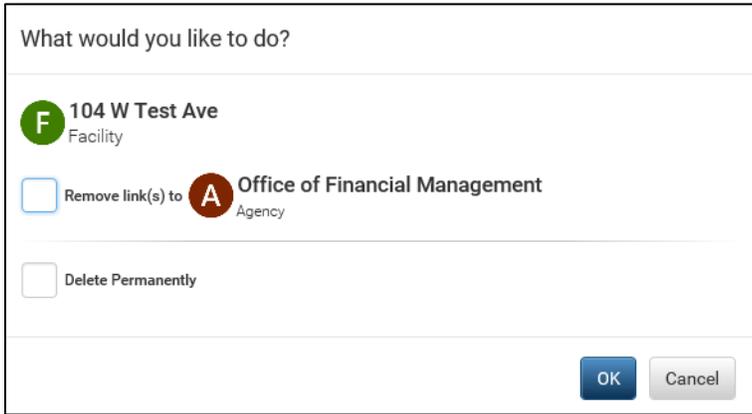


A version of a dialog box appears. One version is shown below. To delete the Entity permanently, click the **Delete Permanently** checkbox, and then click **OK**.



Deleting permanently deletes the Entity and corresponding data immediately. There is no confirmation message, and no undo option.

Another version of the dialog box that appears upon clicking **Delete** is shown below.



Here you have two delete options:

1. Remove the link to the related item, for example remove the link between a facility and a leased facility.
2. Delete the item permanently.

Choose the desired option and click **OK**.

Note: Displayed delete options are dependent on user permissions.

6.8 Access, Manage and Edit Documents

To access, manage and edit documents associated with an Entity, click the **Documents** option from the **Data Menu**.

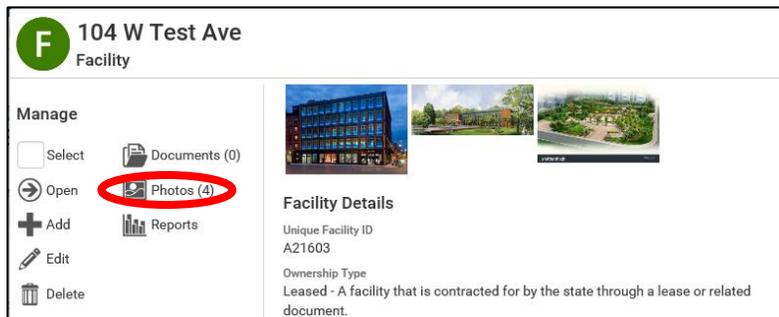
A list of documents related to the Entity appears, as shown.

File Name	File Size	Description
Example Adobe PDF.pdf	151.7 KB	
Example Microsoft Access Database.accdb	268.0 KB	
Example Microsoft Excel Worksheet.xlsx	8.0 KB	
Example Microsoft PowerPoint Presentation.pptx	31.1 KB	
Example Microsoft Visio Drawing.vsd	104.6 KB	
Example Microsoft Word Document.docx	11.2 KB	
Example ZIP File.zip	192.7 KB	

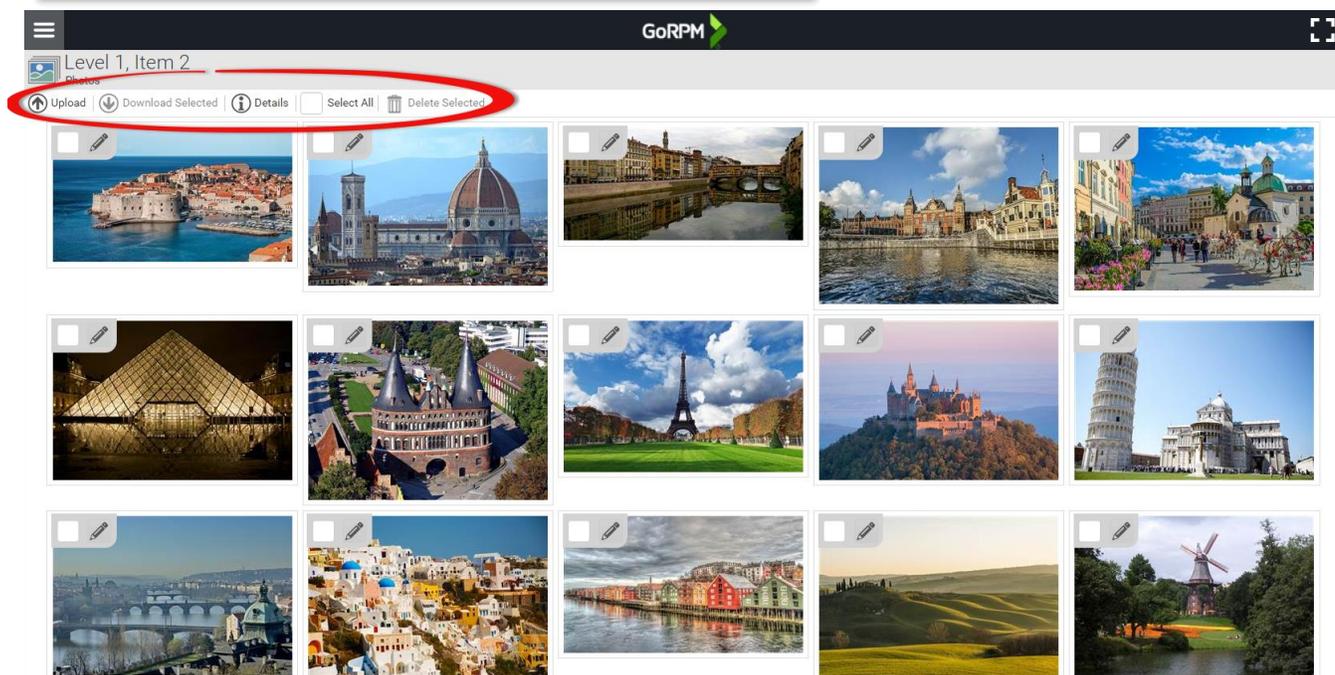
For instructions on uploading a document, downloading a document, editing the file name and description, or deleting a document refer to Sections [5.1.1 – 5.1.4](#).

6.9 Access, Manage and Edit Photos

To access, manage and edit photos associated with an Entity, click the **Photos** option, circled in red below, from the **Data Menu**.



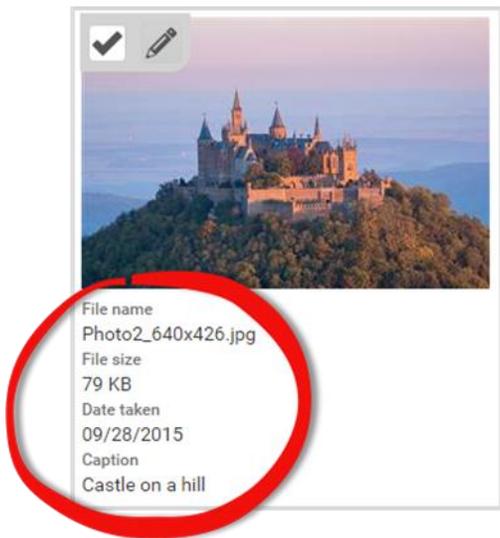
Thumbnail views of all available photos are displayed, as shown below.



A Toolbar, shown circled in red above, is available with options to:

-  **Upload** photo(s)
-  **Download Selected** photo(s)

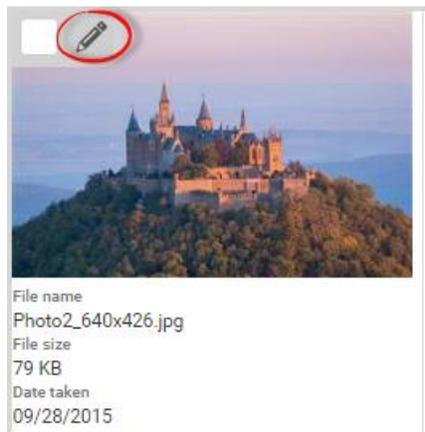
-  (View) **Details** - view detailed Information about each photo, e.g., File name, File size, Date taken, as shown circled in red below.



- Select All** – click this checkbox to use in conjunction with downloading or deleting all photos.

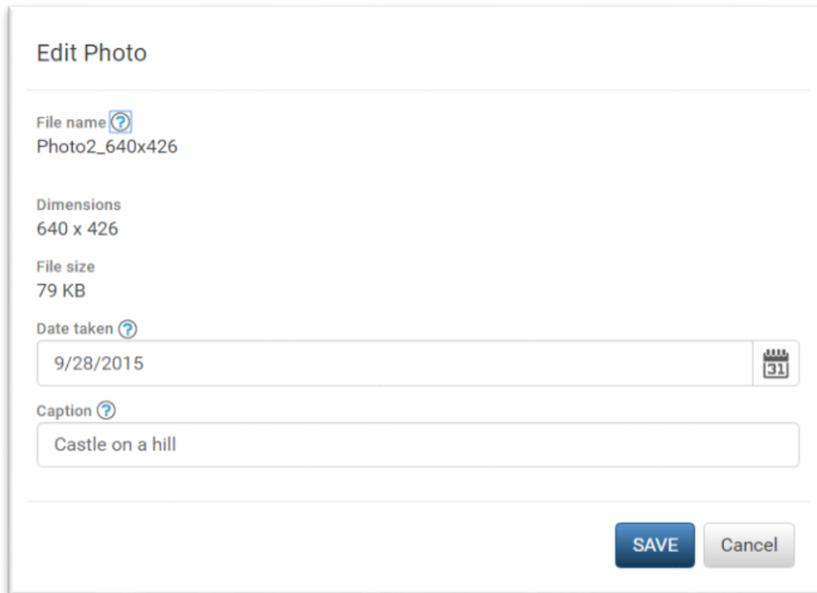
-  **Delete Selected** – click the checkbox in the upper left corner of each photo you want to delete.
Each individual photo has an **Edit** option.

-  Click the **Edit** icon, shown circled in red.



The **Edit Photo** dialog box appears, as shown below.

To add a caption, type text in the **Caption** field.



The screenshot shows the 'Edit Photo' dialog box with the following details:

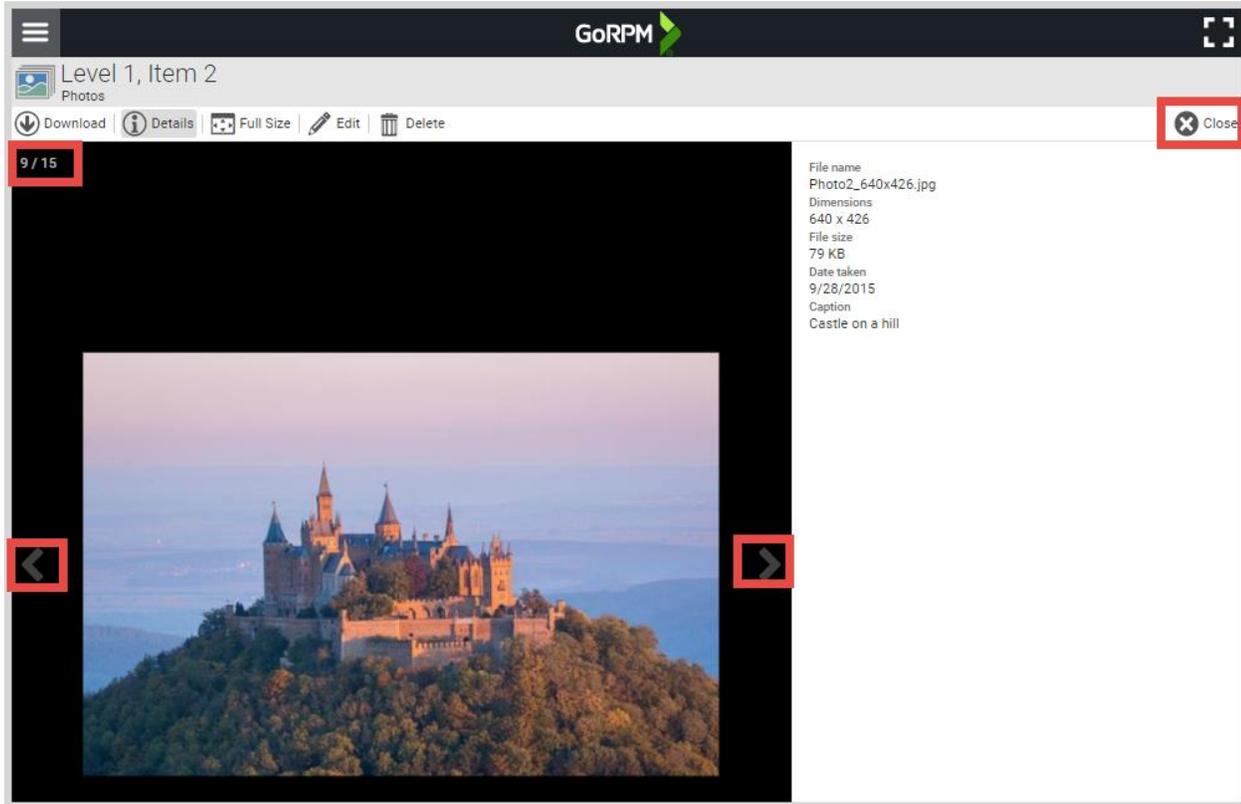
- Title:** Edit Photo
- File name:** Photo2_640x426 (with a help icon)
- Dimensions:** 640 x 426
- File size:** 79 KB
- Date taken:** 9/28/2015 (with a help icon and a calendar icon)
- Caption:** Castle on a hill (with a help icon)
- Buttons:** SAVE and Cancel

To enter or change the date taken, click the **Calendar** icon and choose a date for the **Date taken** field.

Click **SAVE** or **Cancel** to exit **Edit Photo** mode.

6.9.1 Slideshow Mode

Double click a photo to view it and others in the group in **Slideshow** mode.



Hover the mouse in the upper left corner of the viewing area to display the number of images, circled in red below. Click the **Close** button in the right upper corner to exit.

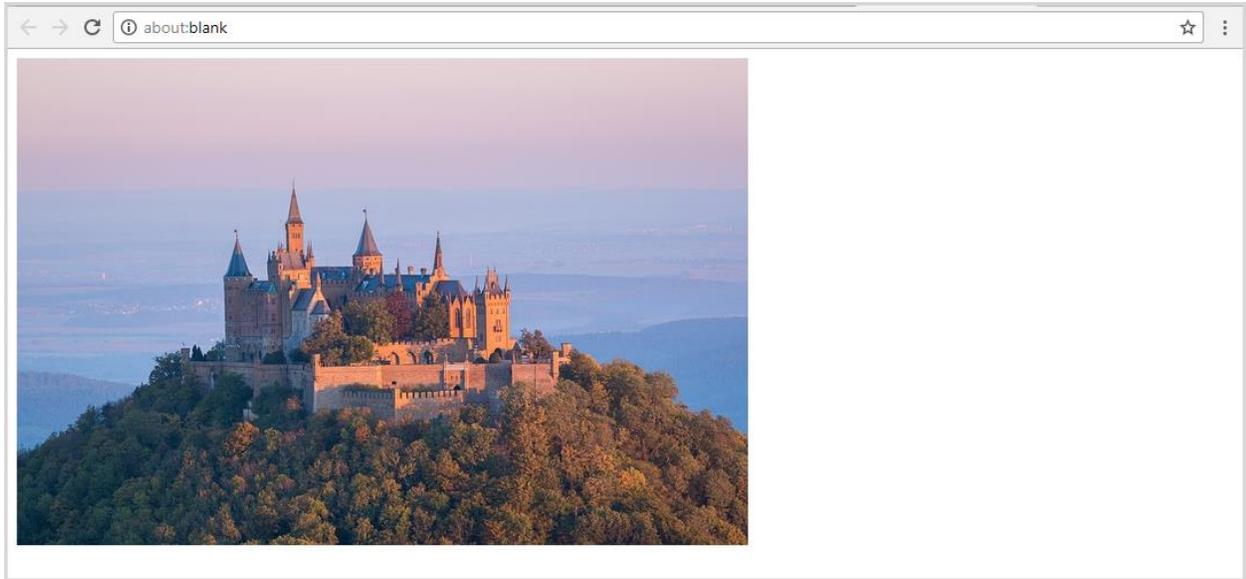
Use the left and right arrows to navigate through the available photos.

Click the **Close** button in the right upper corner to exit.

Click the **Full Size** button, shown circled in red below.

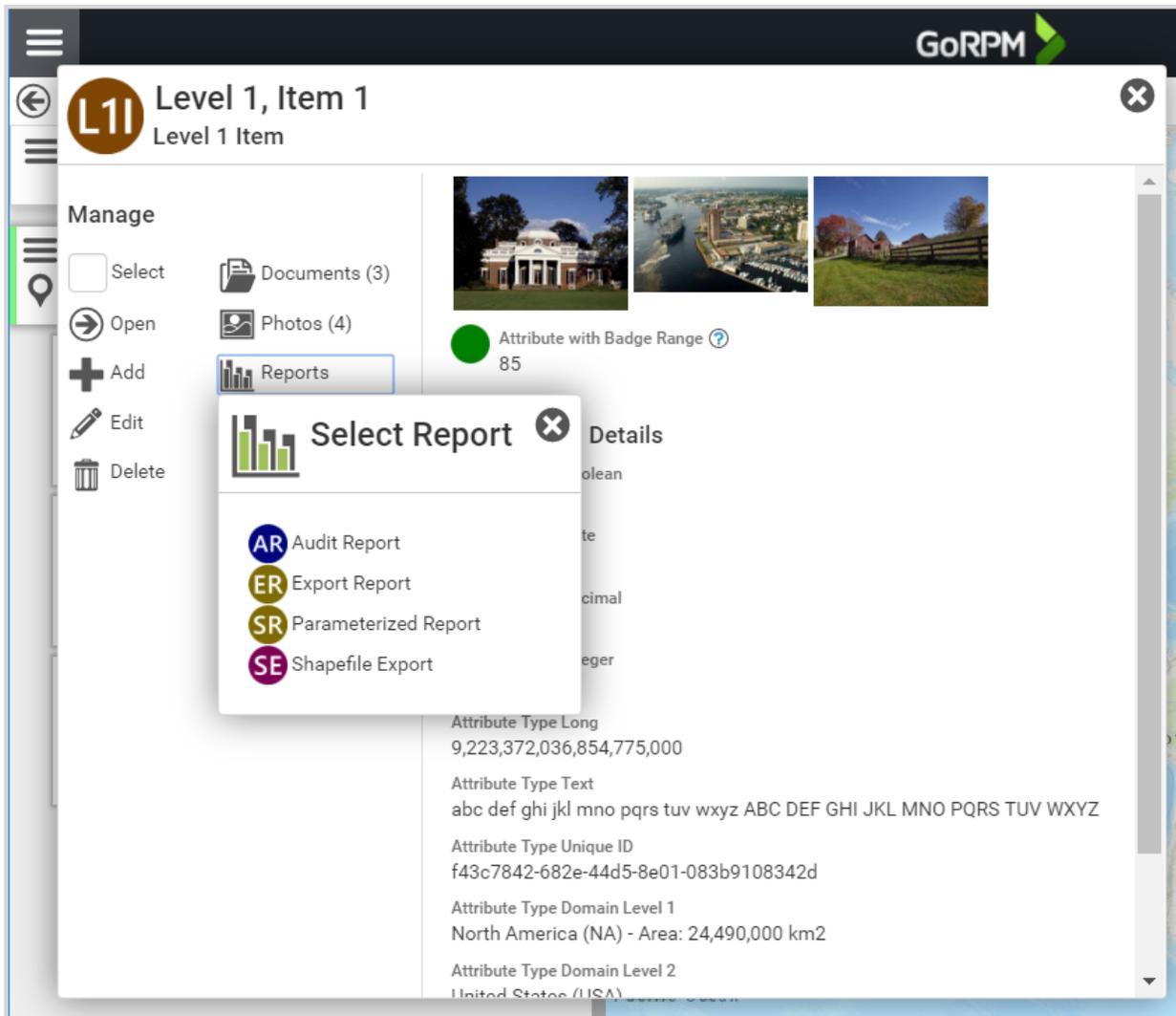


A full size version of the image appears.



6.10 Access and Request Reports

The list of reports to choose from are based on permissions assigned to the role(s) of your account. Below are descriptions of basic reports.



Other reports, as configured in the implementation, may be available. Below are descriptions of basic reports or basic report types.

6.10.1 Audit Report

An **Audit Report** displays the history for the Selected Entity, such as changes to the Entity:

- Attributes
- Relationships

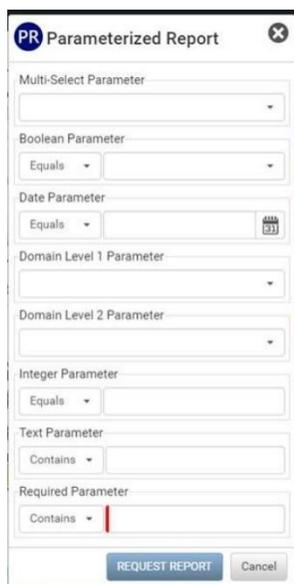
6.10.2 Export Report

An **Export Report** exports all attributes associated with the Selected Entity to a Microsoft Excel file or to a Microsoft Access file. Note: if over 32,767 characters in a cell, the data gets truncated in Excel. Use Access for this situation.

6.10.3 Parameterized Report Example

A **Parameterized Report** allows you to customize the data displayed in a report. With a parameterized report, you can vary the output of a report based on values that are set when the report runs.

When a Parameterized Report is opened, a pop-up window appears with parameters that can be used to filter data for the report.



Note: In some cases, the parameters may be pre-filled, based on how your System Administrator has configured the system.

Upon filtering by attribute/selecting other options, click **REQUEST REPORT**.

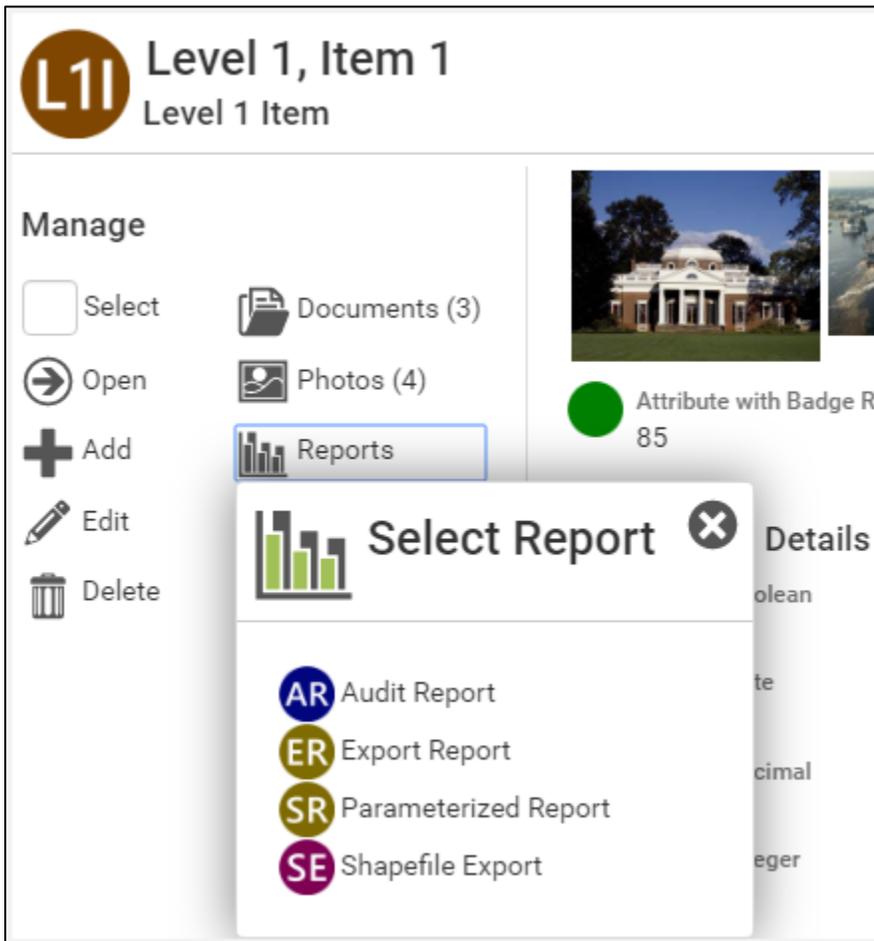
6.10.4 Shapefile Report

A **Shapefile Report** exports .ZIP file with geometry and all entity attributes to Esri shapefile(s).

Upon filtering by attribute/selecting other options, click **REQUEST REPORT**.

6.10.5 Request Reports

To access reports, click the **Reports** option from the **Manage Menu**.

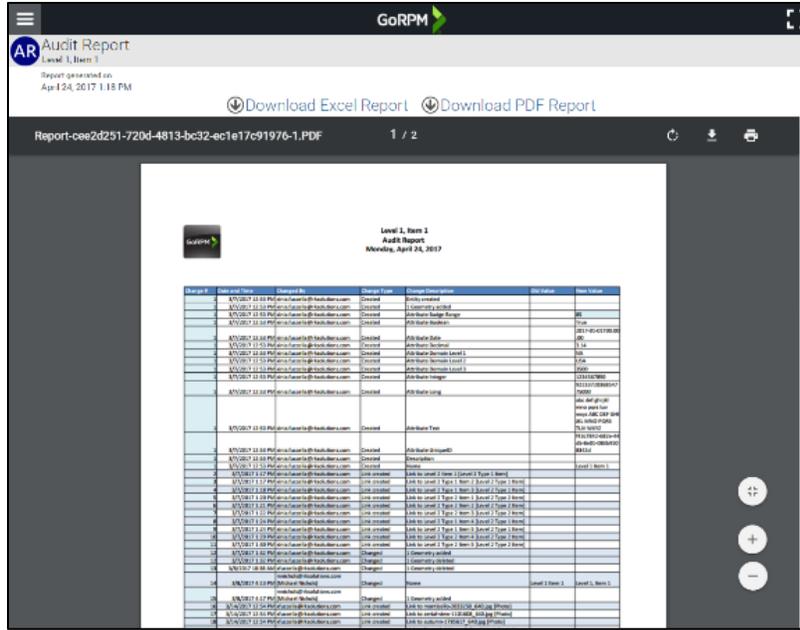


Click the report you chose to run.

The report automatically generates and opens in a new and separate browser window.

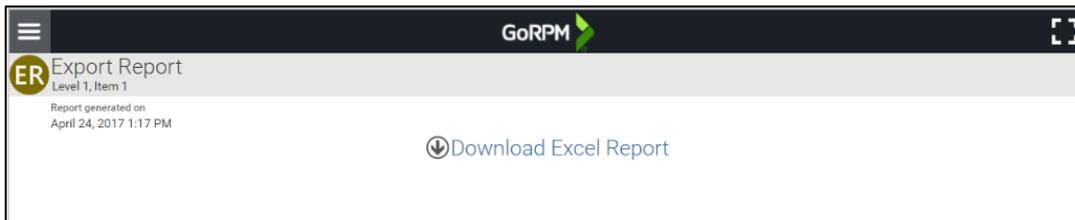
Depending on the size, the report may take a few seconds or moments to generate.

If supported by your browser, the report is displayed, as shown. You then have the option to review, download or print the report.



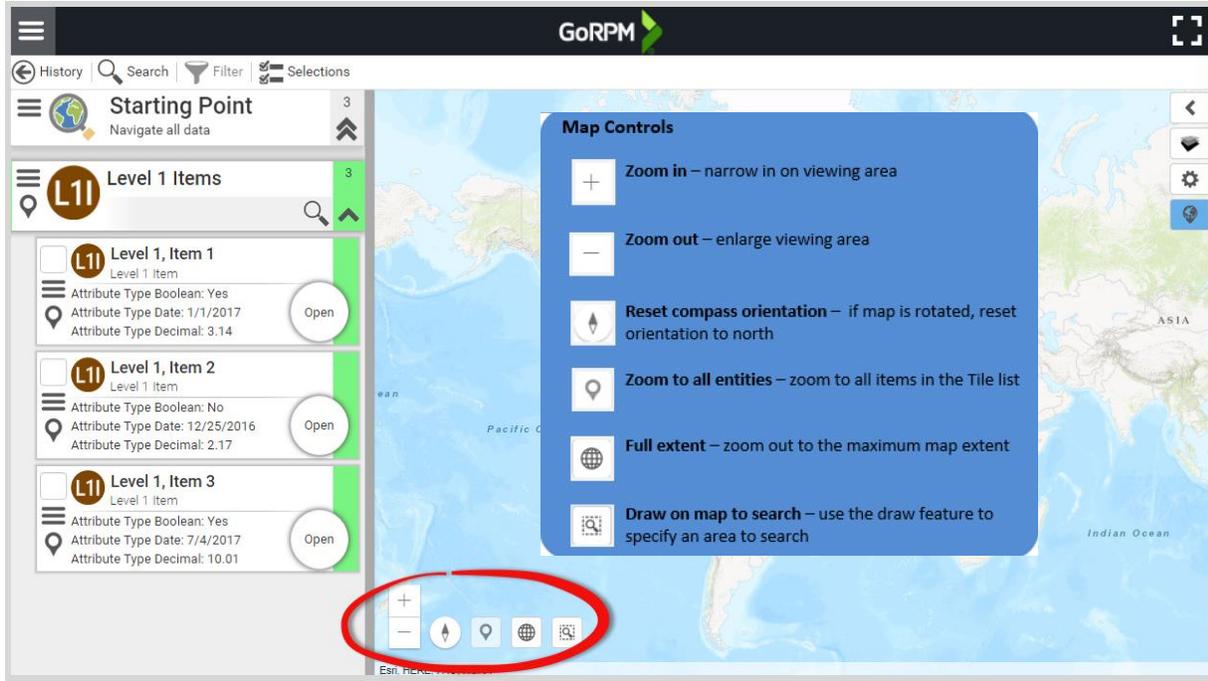
Otherwise, the report is available for downloading, as shown.

Export Report



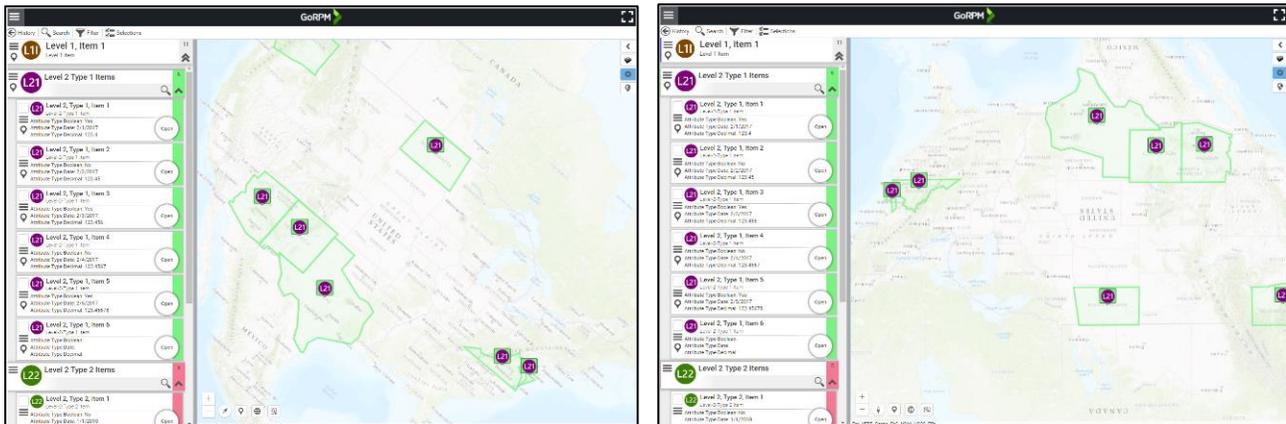
6.11 Data Explorer Map Controls - in Detail

The map controls are shown below, circled in red. The tools allow you to change the way the map is operating.



6.11.1 Rotate Map

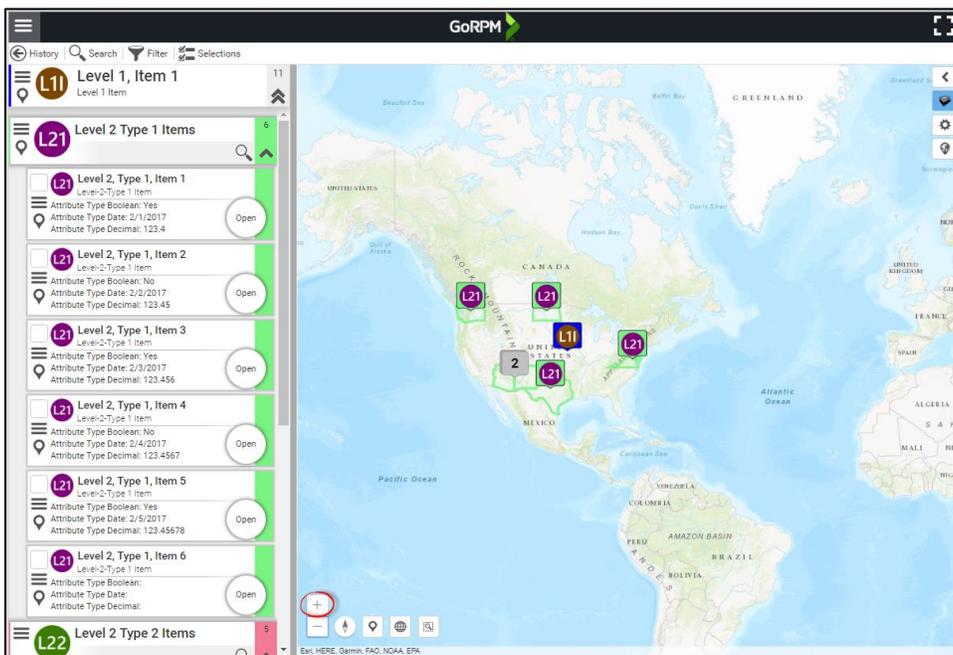
No tool is associated with this feature, but you can rotate the map by clicking anywhere on the map, holding the right mouse button down, and making a circular movement. Shown below is an example of a slightly rotated map and a fully rotated map. Map rotation is usually used in conjunction with printing. Entity markers, including badges, will not rotate so that they remain readable. **Reset Compass Orientation**, described below, allows easy repositioning.



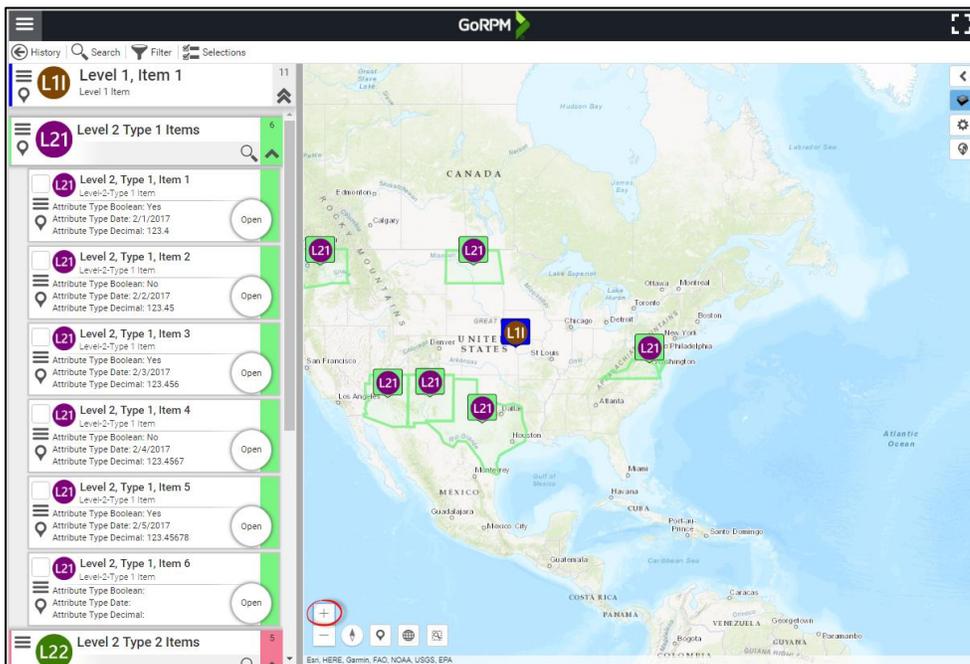
6.11.2 Zoom in and Zoom out

The **Zoom in** and **Zoom out** tools allow you to narrow in on or enlarge a map viewing area. The following series of maps show how the results displayed can depend on how “zoomed in” you are. Note how the data in the **Tile List** also displays differently.

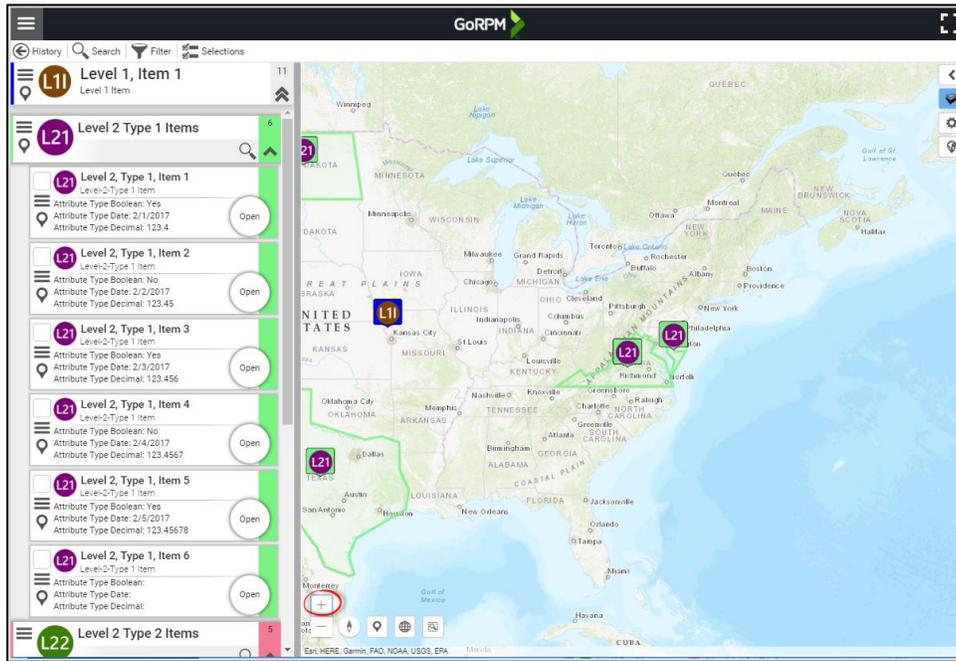
Map – starting view



After one click of the map zoom in tool



After two clicks of the zoom tool



Map point 2 in the image below shows two geometries that intersect the map point search, and the cluster. The color of the geometries match the colors of the borders of the tiles on the list--green, pink and light blue.



Map point 3 in the image below shows the individual badges that form the cluster of two in the above screenshot.



6.11.3 Zoom to all Entities



The **Zoom to all Entities** tool allows you to, with a single click, view all entities represented by the data in the Tile List. The map may shift position (e.g., shift left or right), or the map may zoom out for a wider view.

6.11.4 Reset Compass Orientation



The Reset Compass Orientation button allows you to easily orient the map back to North upon rotation.

6.11.5 Draw on Map to Search



The **Draw on map to search** button allows you to search for data that falls within the area drawn. The tool is explained in detail in section 6.12.2. When in use, the button toggles to a

Finish draw on map to search button



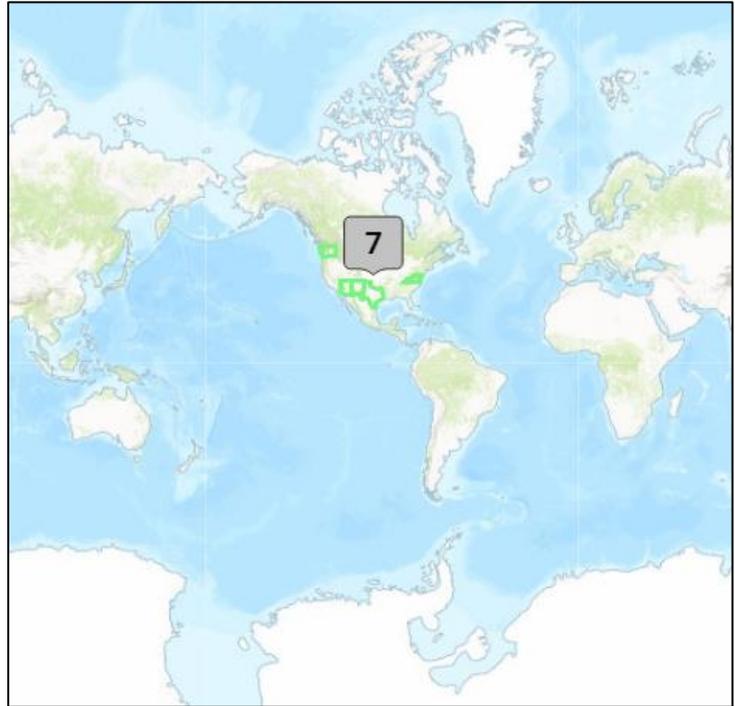
and a **Cancel draw on map to search** button.



6.11.6 Full Extent



The **Full Extent** tool zooms your map to show you all data in your map. The second image below is the full extent view of the first image.



6.12 Data Explorer Map Slide Out Menu in Detail

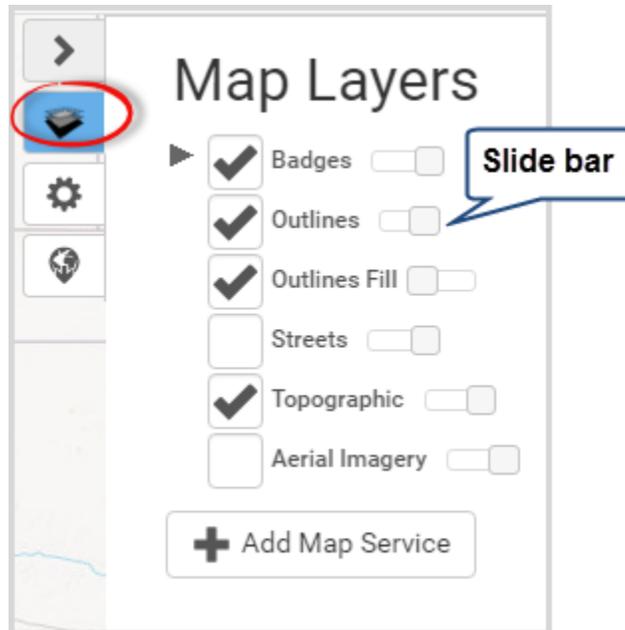
Maps use base maps that the System Administrator has configured.

The **Slide Out Menu** in the right upper corner of the Map provides access to **Map Layers**, **Settings** and **Export** capabilities.



6.12.1 Map Layers

Upon clicking the **Layers** button, shown circled in red, the **Map Layers** menu appears.



A map layer defines how data appears in map views. The following map layers are available to choose from:

- Badges - turns Badges off/on. Badges may be either:
 - Default Badges, or
 - System Administrator defined Badges

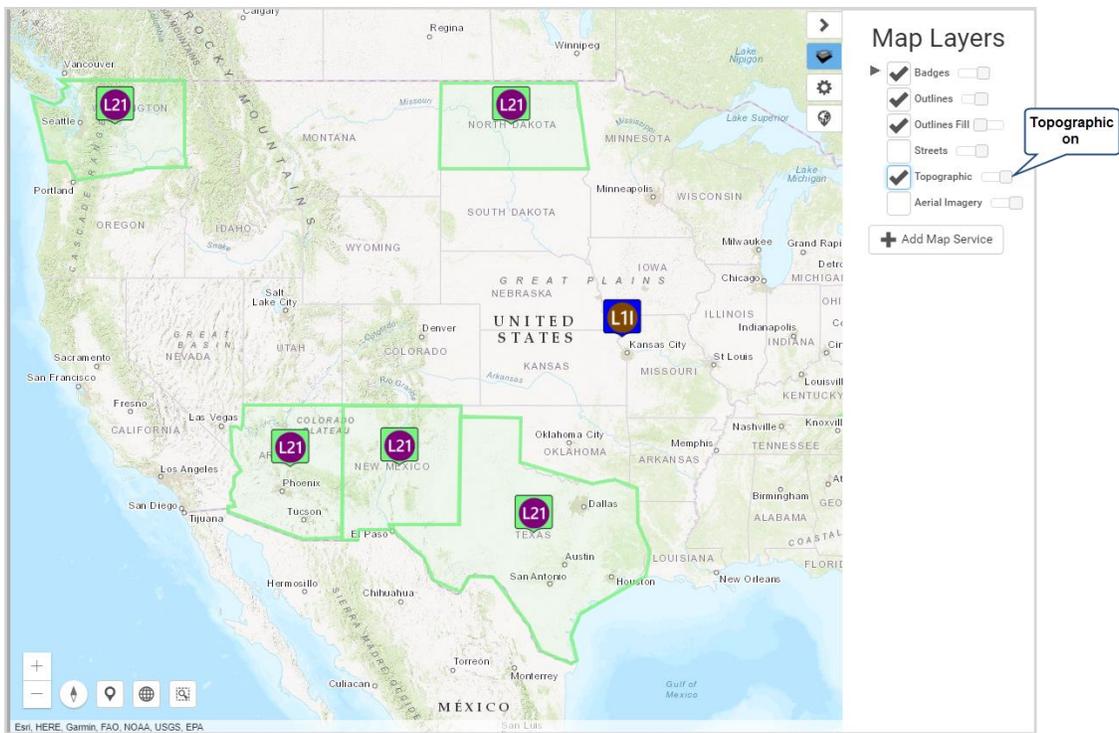
- Outlines - turns geometry outlines for Entities off/on
- Streets
- Topographic
- Aerial Imagery
- System Administrator defined Map Layers

6.12.1.1 Change Display of Map Layers

To the right of each layer option is a **Slide bar**.

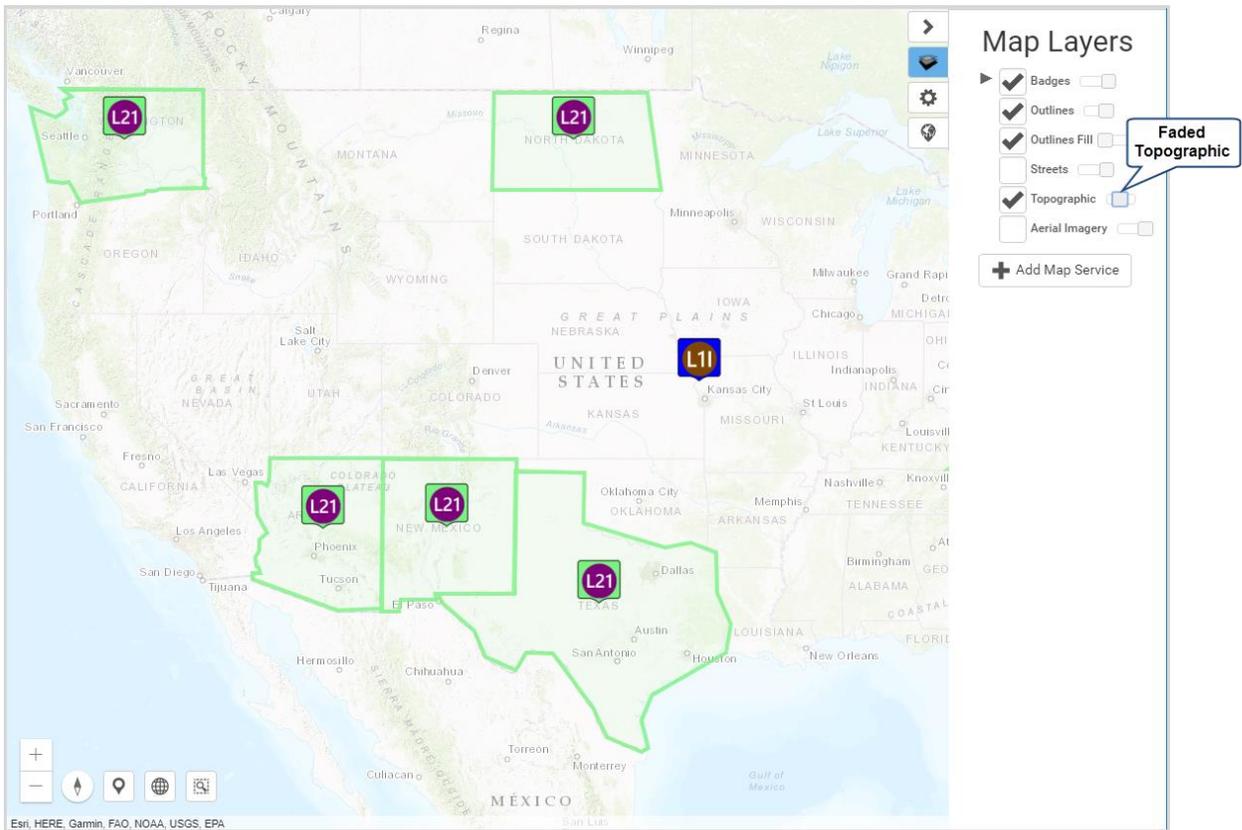
You can specify how each layer is displayed on the map by using your mouse pointer to slide the bar, turning each layer on or off.

For example, below are two versions of the map, one showing the slide bar to the right and topographic layers on (checked box), the other showing the slide bar to the left, and topographic layers off (box unchecked). Note also that the slider for “Outlines Fill” is slightly on, and the geometries are slightly filled with color.





Position the slider in-between off and on to fade the layers on the map in and out. By doing so, you can see the information in other layers. The map below shows faded topographic layers.

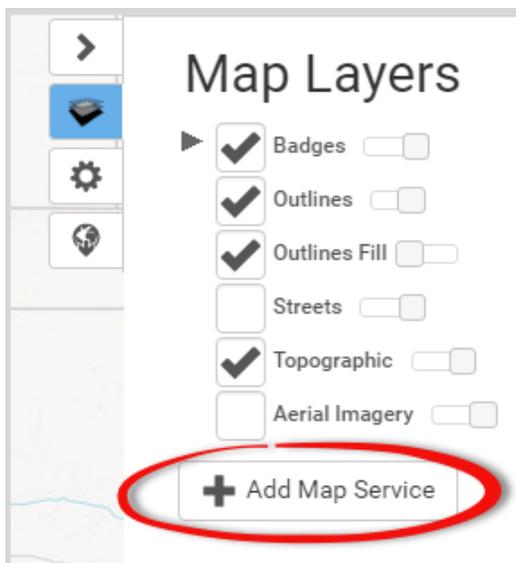


6.12.1.2 Add Map Service

You can customize your map by adding a map service from an external source and combining the external mapping data with your own data in GoRPM. GoRPM supports common map service formats such as Web Map Service (WMS).

Note: Your System Administrator enables map services you can access.

From the **Map Layers** menu, click **Add Map Service**.



The **Add Map Service** window appears.

A screenshot of the 'Add Map Service' dialog box. The dialog box has a title bar that says 'Add Map Service'. It contains two text input fields: 'Name' and 'URL'. Both fields have a red vertical bar on the left side, indicating they are required. At the bottom right of the dialog box, there are two buttons: 'ADD' and 'Cancel'.

In the **Name** field, type a name that describes the external map layer.

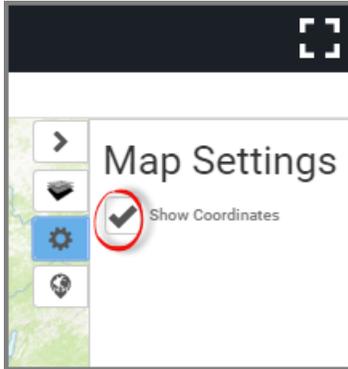
In the **URL** field, copy and paste the URL (web address) corresponding to the map service.

Click ADD to finish or **Cancel** to exit.

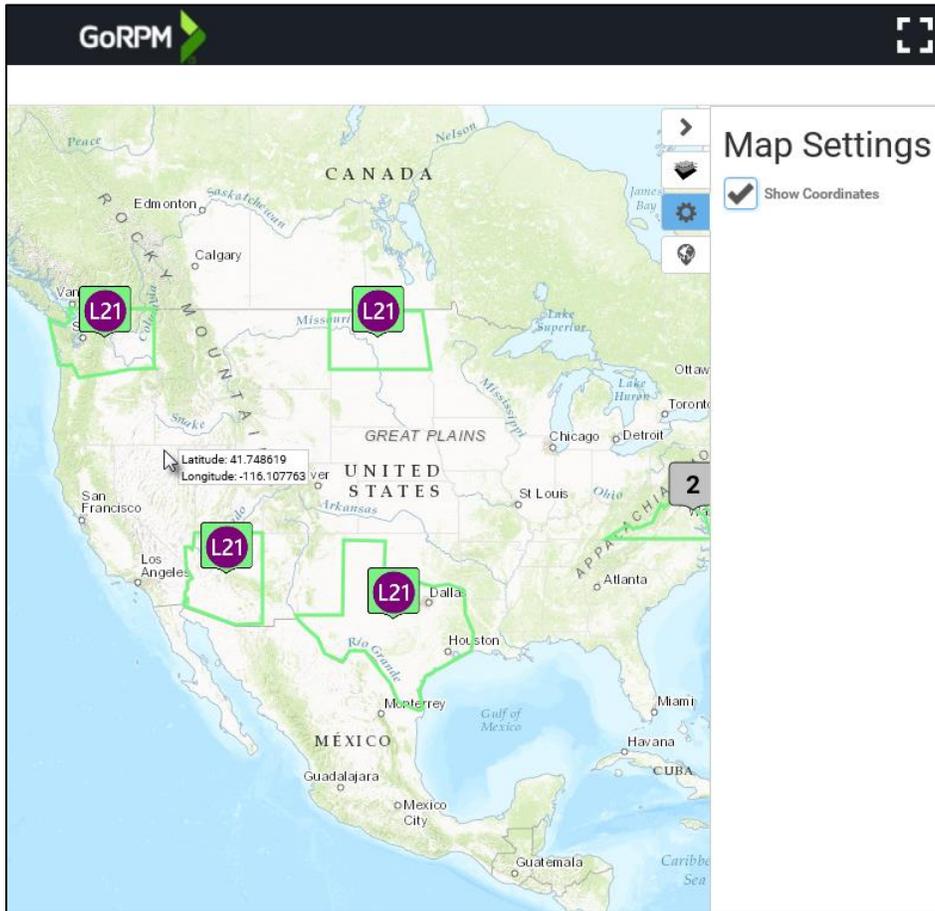
6.12.2 Map Settings – Show Coordinates



Upon clicking the **Map Settings** button on the **Slide Out Menu**, the **Map Settings** menu appears, as shown.



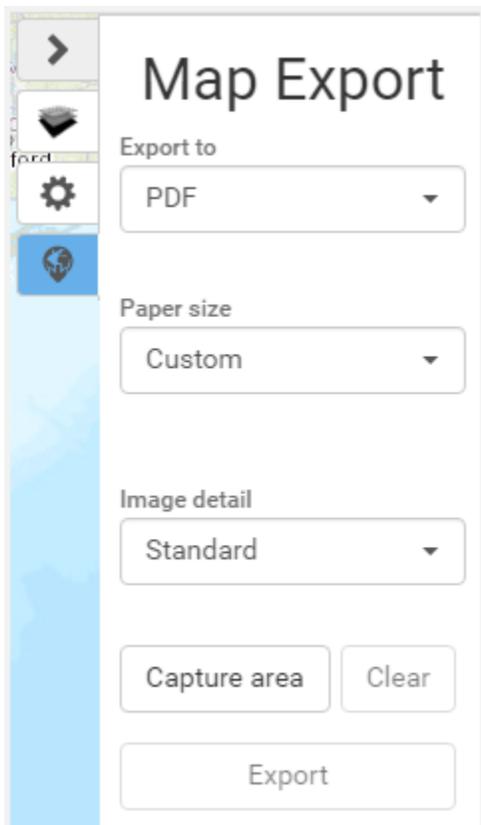
Click the **Show Coordinates** checkbox to display the latitude and longitude coordinates associated with the tip of the mouse pointer, as shown below.



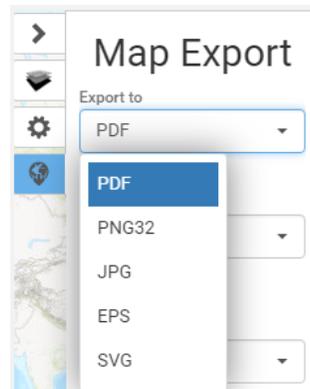
Note: With the **Show Coordinates** box checked, Latitude and Longitude show on the map only when you actively navigate (move your mouse cursor over) the map.

6.12.3 Map Export

Upon clicking the **Export** button on the **Slide Out Menu**, the **Map Export** menu appears, as shown. Options available are explained below.



Export to – Displays a list of available export formats for the Map such as PDF, PNG, or JPG.



Paper size – Displays a list of available paper print sizes for the export.

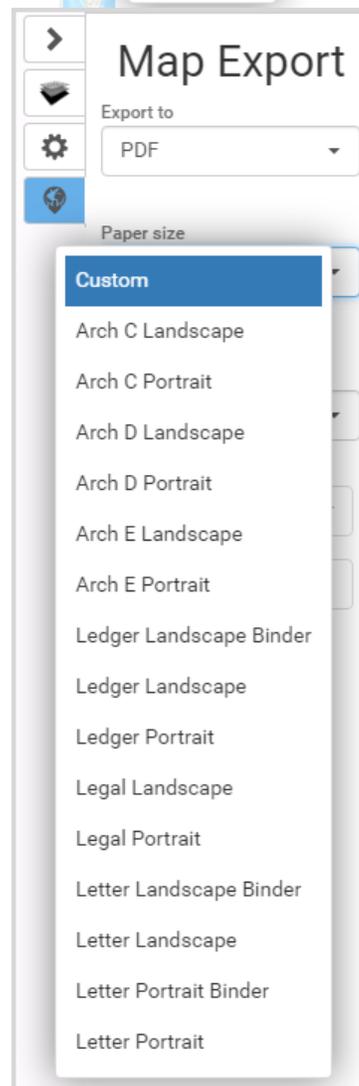
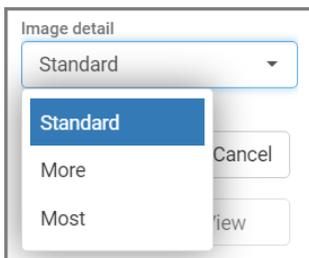
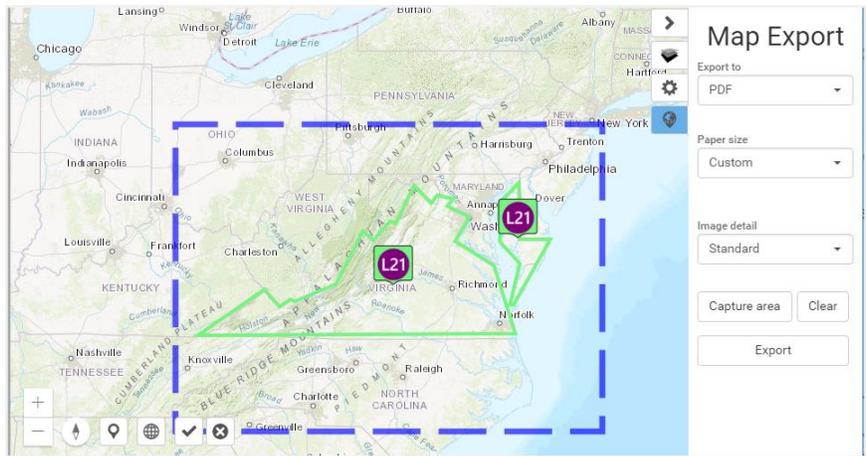


Image detail – Allows you to select the level of image detail for custom paper size.

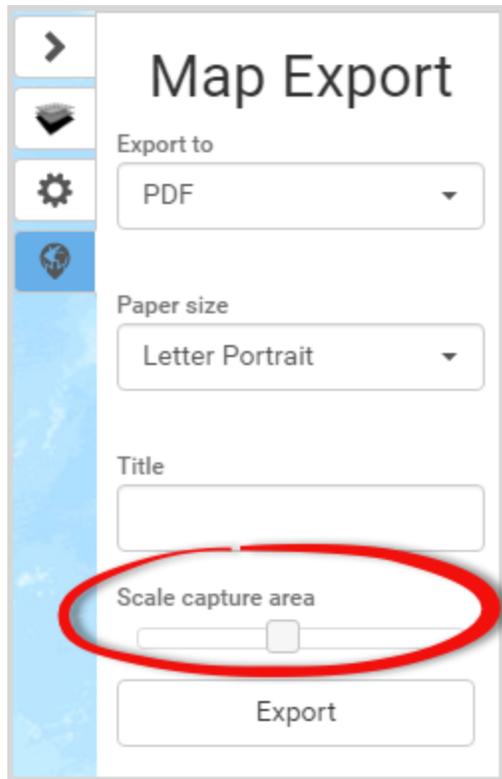


Capture area – Allows you to select and draw an area on the Map you want to export. Press your mouse pointer down to start drawing, and let go to finish drawing. A blue dotted line appears around the area you draw, as shown.



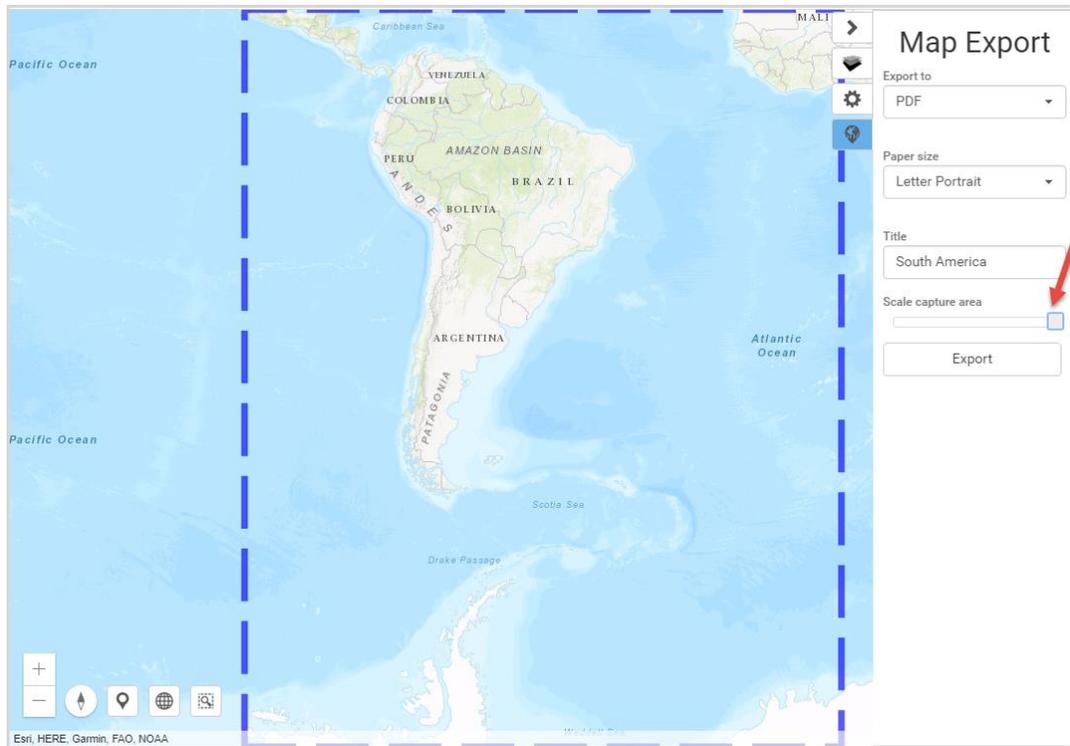
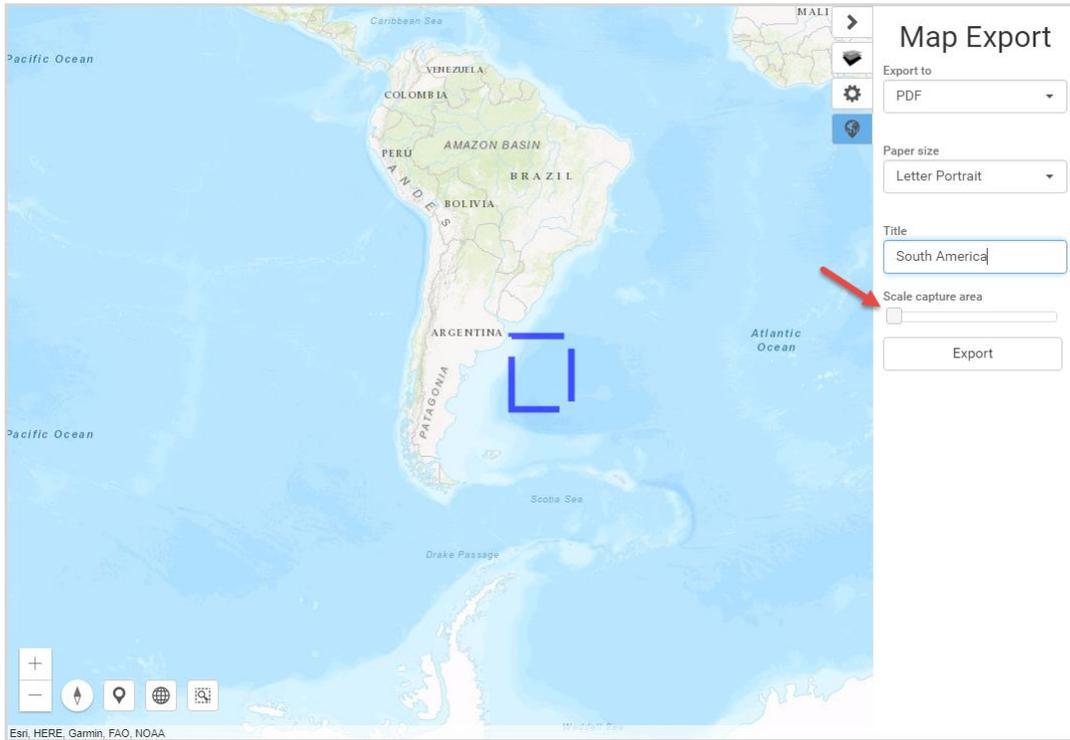
Upon choosing any paper size other than custom, a **Scale capture area** slide bar appears, as shown circled in red below.

Upon choosing any paper size other than custom, a **Scale capture area** slide bar appears, as shown circled in red below.



Note: The option to scale the capture area appears with all paper sizes except Custom.

Below are two examples of a capture area. At a particular zoom level, the first image shows the minimal capture area, and second shows the maximum capture area.



Clear – (Custom paper size only) Clears the drawing/area on the Map to export.

Export – If supported by your browser, GoRPM downloads the Map export in the file type you select.

View in Browser – GoRPM displays the Map export in a new browser tab. The zoom buttons shown in the bottom right corner of the first screenshot below are browser dependent. Your browser may or may not offer the ability to resize the map, to download, or to print. Shown below are three different versions of the same map within the same browser.

Paper size for this image is set to “Custom.” Custom generates whatever is displayed in the drawn selection (dotted line blue box). “Custom” is often used for JPG files for PowerPoint presentations.



Paper size for this image is set to “Portrait.”

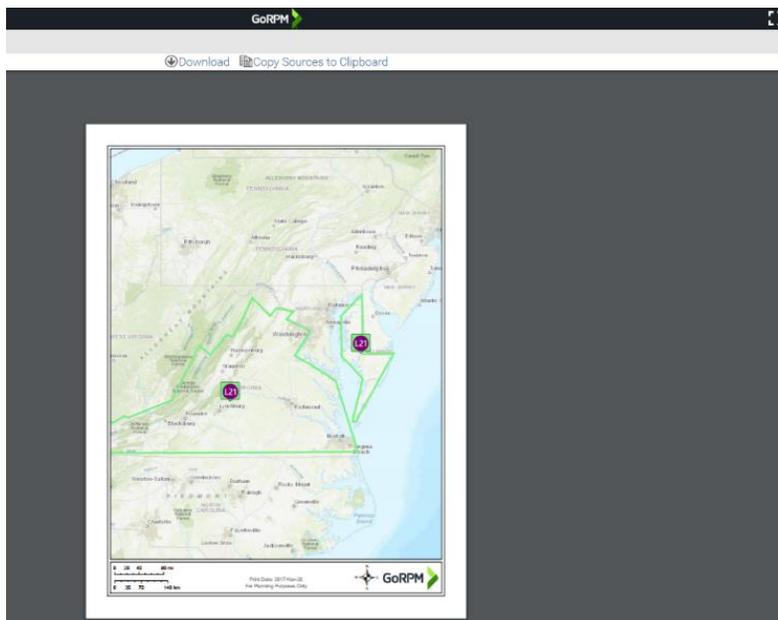
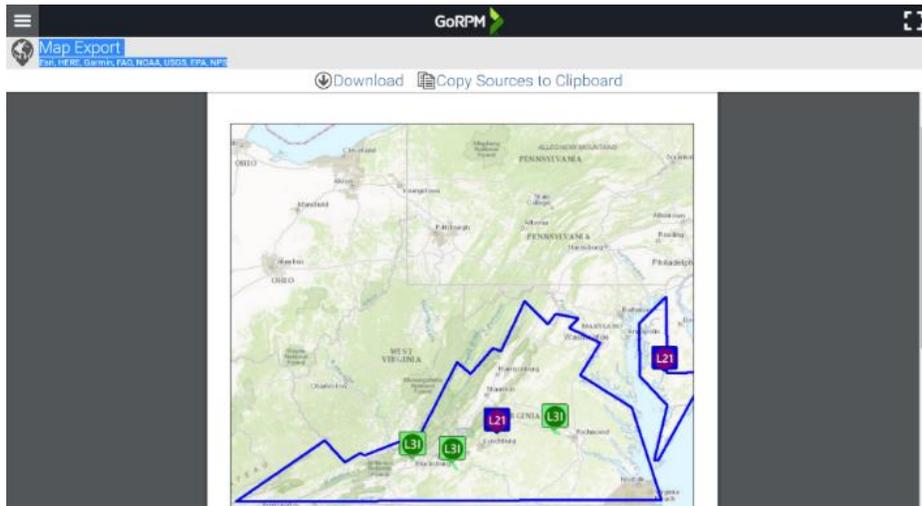


Image in full screen mode

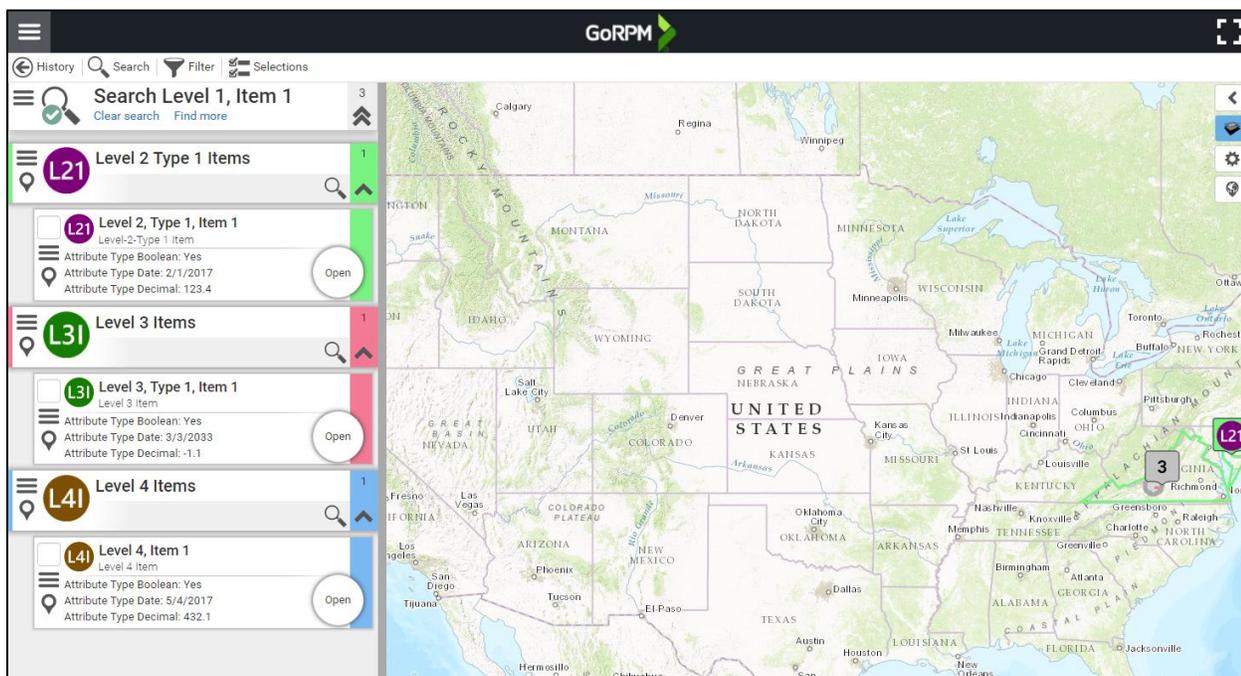


6.13 Data Explorer Map Search - in Detail

You may search for entities on the map in multiple ways. A **Map search point** is a key concept.

When you click a point on the map with your mouse, you create a **Map search point**. The drill down point where you click, plus the buffer is also called the **Map search point**. The buffer size is relative to your zoom level.

Note: If no entity geometries exist in the **Map search point** area, the message “No results were found for the given search criteria” appears.



6.13.1 Click the Map to Search for Entities

You can click anywhere on the map to search for entities. If available, search results load upon releasing the mouse button. The drill down point where you click, plus the buffer is called the **Map search point**. If no entities exist in the **Map search point** area, the message “No results were found for the given search criteria” appears.

In the example below, the **Map search point** is represented by the grey circle in the state of Texas. The geometry of the entity depicted below is the entire state of Texas. The green outline denotes the entity boundaries, and is the same color as the associated tile's border; the badge is not the geometry.



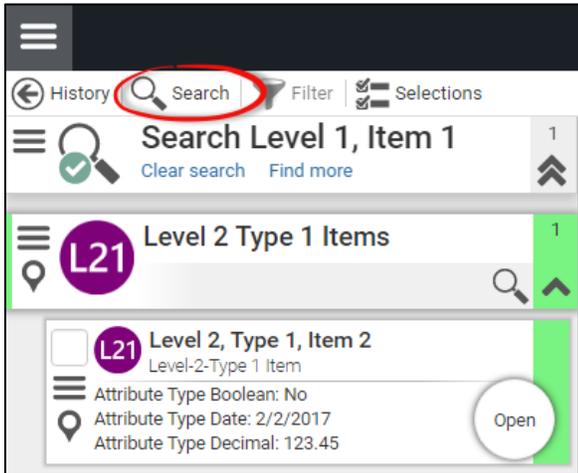
Entities that have geometry that intersect the map search point are shown in the results, as shown below.



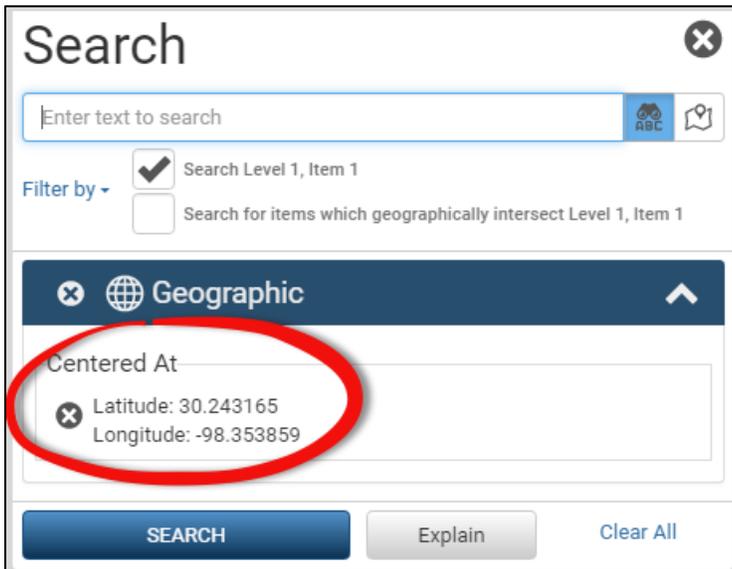
6.13.1.1 Latitude and Longitude of the Map Search

The latitude and longitude of the **Map search point** is displayed as part of the search criteria.

Click **Search**, shown circled in red below.

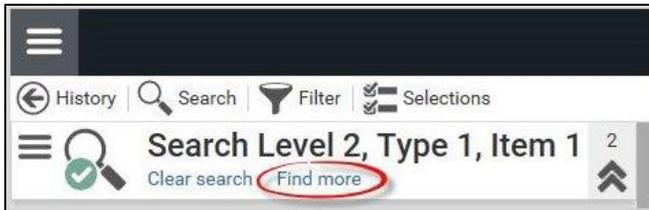


A **Search** window appears. The latitude and longitude of the “Centered at” **Map search point** appears, as shown below.

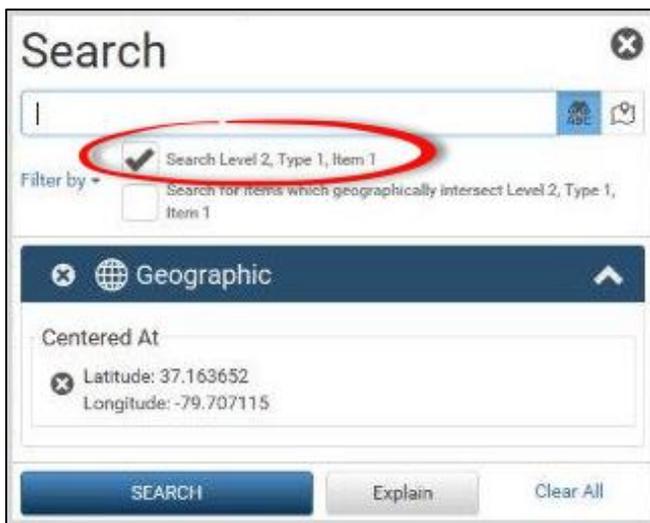


6.13.1.2 Find More

The **Find more** link, shown circled in red below, allows you to find other entities not in the current context, that intersect the map search point. In other words, the search is not limited to the current context.



When you search the map, the current context is the default search, as shown below.

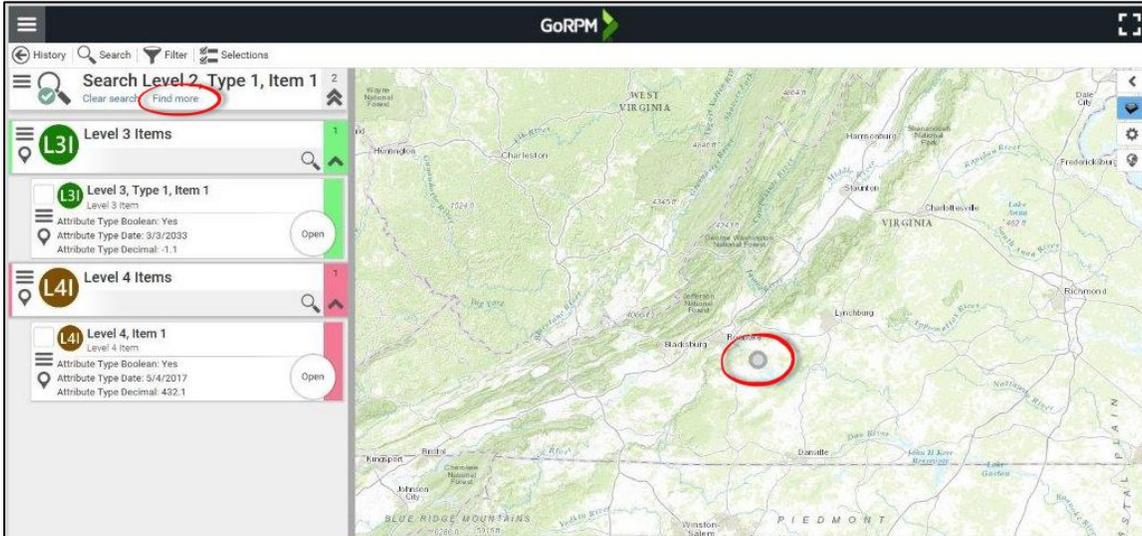


The **Find more** feature will remove the current context from the search criteria. As shown below, the **Filter by** criteria is no longer selected.

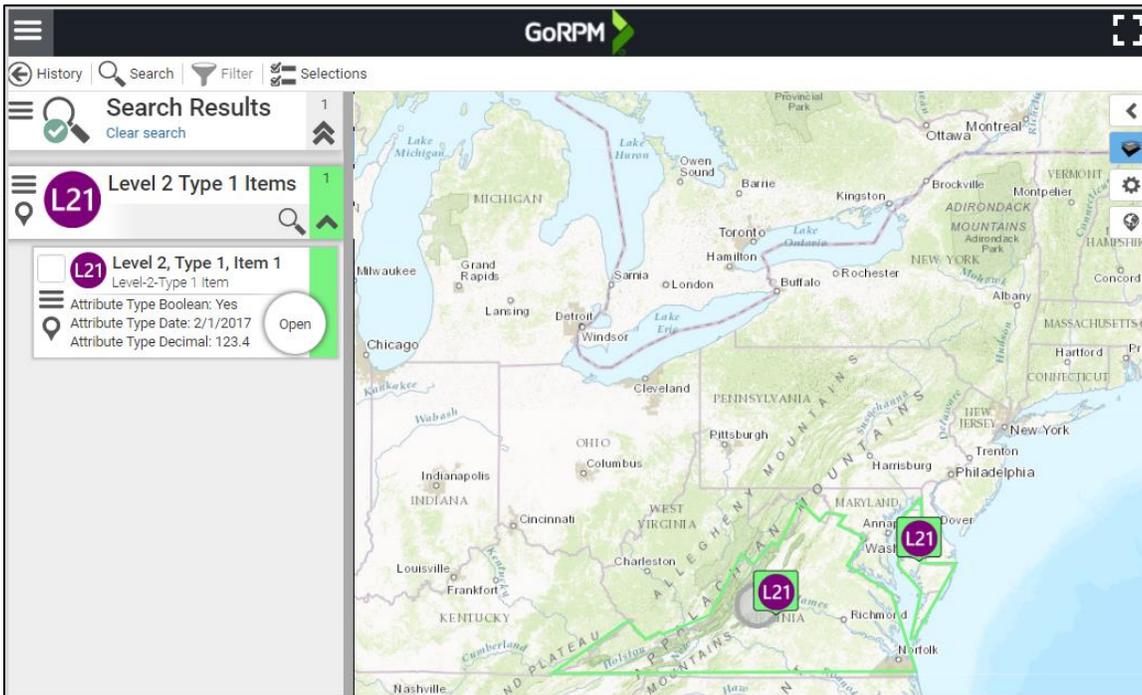


The **Find more** link only shows after your first search. The **Find more** link is available only if there is more geometry on the map intersecting a map search point.

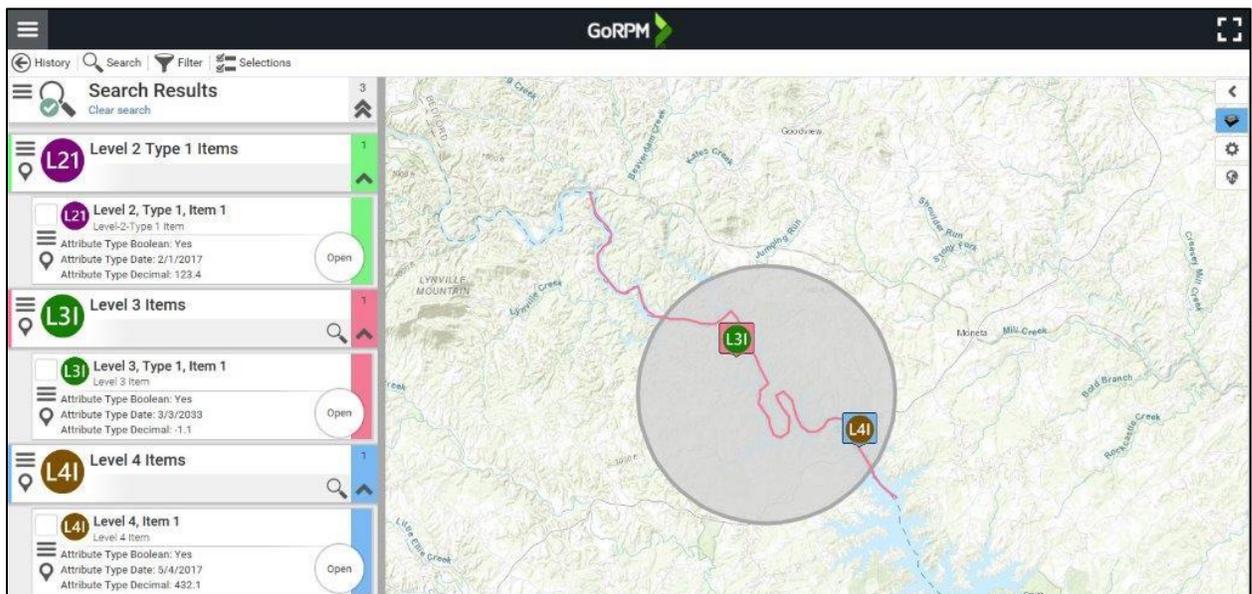
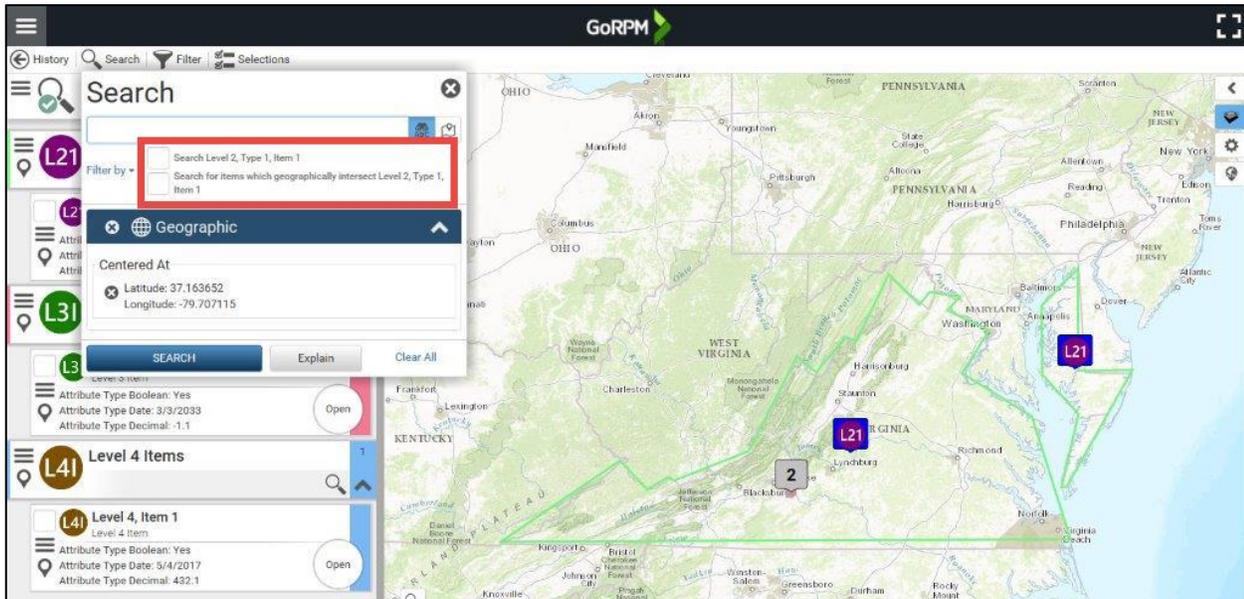
To use **Find more**, click anywhere on the map where there may be more than one geometry, and click **Find more**. In the example below, the point clicked is the round grey **Map search point**.



Upon clicking **Find More**, any additional related entities appear, as shown in the example below.

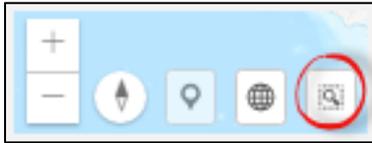


The next screen shows the additional found entities with intersecting geometry. The context of Level 2 is removed from the filtered search criteria, and added to **Search Results** on the left of the screen.

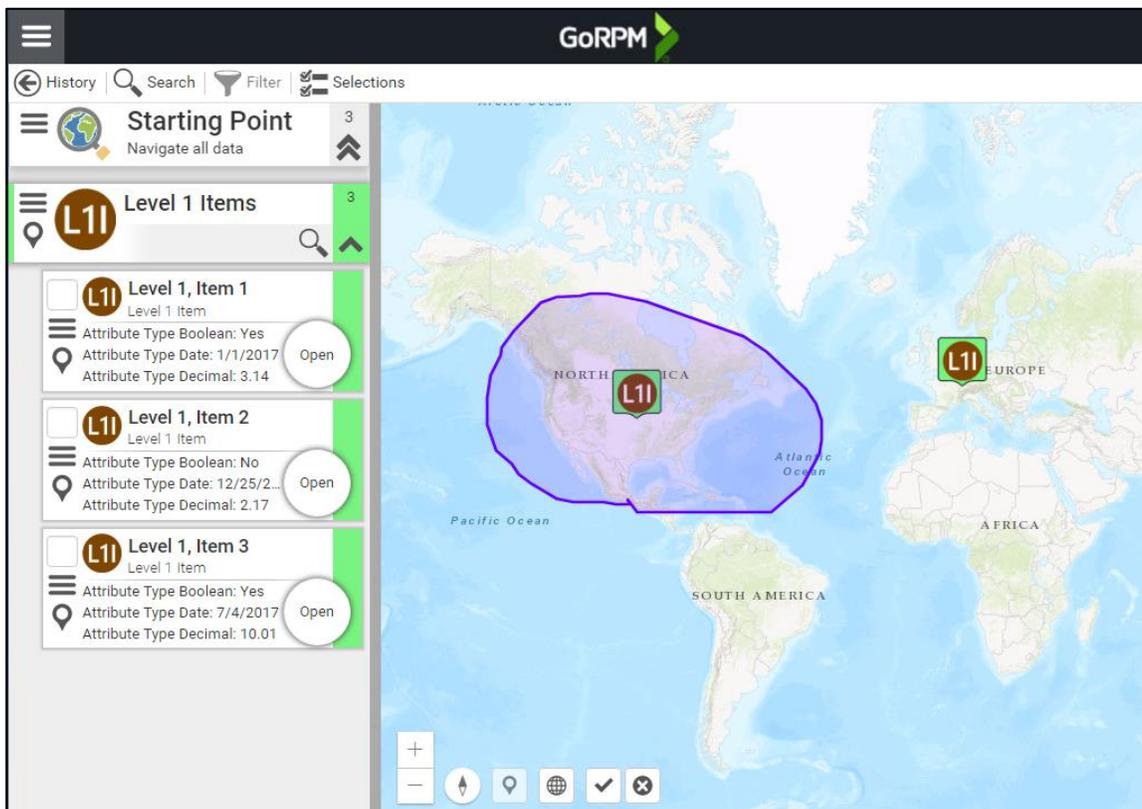


6.13.2 Draw on Map to Search

1. Click the **Draw on Map** tool, shown circled in red.



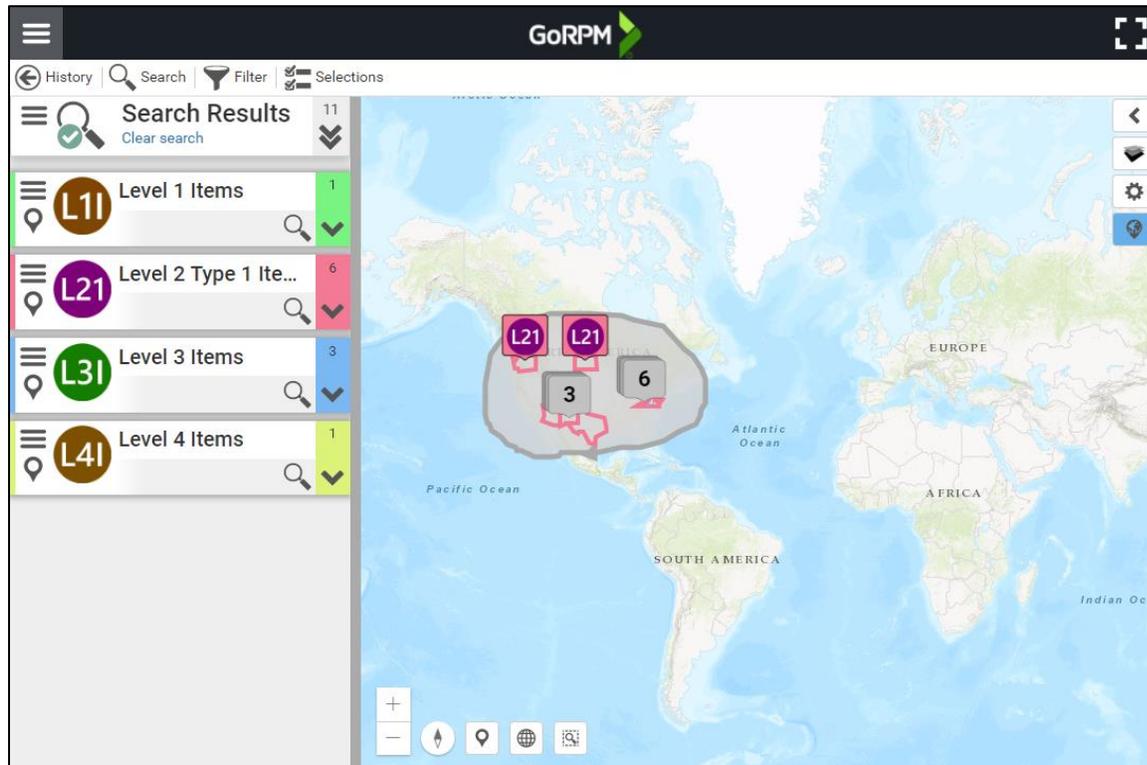
2. Click the map.
3. Press the mouse button to draw.
4. Draw any shape on the map. While drawing, the outline and area shading is purple, as shown below.



Note: The **Draw on map to search** button changes to a **Finish draw on map** button  and a **Cancel draw on map to search** button  while you are drawing. If you want to start over, click the **Cancel** button.

5. Let go of the mouse button and double click to finish. Upon releasing/drawing shape, **Search Results** (from within the area drawn) load. The shaded area also turns gray, as shown below.

In the example below, all entities having a geometry that intersect the area drawn show in the **Search Results**. Even if the entity is only slightly within the parameter of the area drawn, it appears in the **Tile List**.



6.13.3 View Details of Search by Clicking Cluster Icon on Map

Cluster icons, described in Section 3.5.3, may be used to search as well. Clicking a cluster icon (representing multiple individual badges) on the map adds the results to the **Tile list (Search Results)** on the left of the screen). The context **Tile list** shows all entities that have geometry associated with the individual items, represented by the cluster icon.

7. State of Washington Business Processes

7.1 Overview of State Business Processes

The preceding sections have provided an overview and general instructions on how to use the GoRPM-FPMT solution. The following sections provide instructions on business processes specific to FPMT in sequential order based on system navigation. Before reviewing these instructions, below are some overarching concepts.

7.1.1 Minimum Data Requirements

There are three types of facilities stored in the FPMT system. Each type is based on the type of obligation the state has to that facility (i.e. ownership type). These include owned, leased, or other. Below are the minimum data requirements for each type of facility in the FPMT system.

An owned facility is one that is legally owned by an agency of the State of Washington. The minimum data entry requirements for an owned facility are the fields in the **Facility**, **Owned Facility** and **Space** tables. To complete this data you will likely need access to your deed and a floor plan with total square footage.

A leased facility is one that is obligated to an agency of the state of Washington through a contract, most commonly a lease. However, the contract may take other forms, including but not limited to a sublease from a private sector entity, a resource sharing agreement (RSA), a memorandum of understanding (MOU), an interagency agreement with a local or federal government (IAA), or a federal license. For this system, a leased contract is any contract where the primary purpose is to acquire space. The minimum data entry requirements for a leased facility are the required fields in the **Facility**, **Leased Facility**, **Lease Contract**, **Lease Payment** and **Space** tables. To complete this data you will likely need access to your lease contract and a floor plan with total square footage.

An “other” facility is one that houses state employees, but is not obligated to the agency or is obligated through a larger agreement which has broader focus than the obligation of space. For example, a service delivery contract for construction of a building, road, or other service in which the contractor provides some space to accommodate state employees to oversee that construction or to partner with the contractor. The primary purpose for an “other” facility is to include that facility in the Human Resource Management System (HRMS), allowing state employees to be assigned to the facility. The minimum data entry requirement for an “other” facility is to populate the required fields in the **Facility** table.

There are several additional tables in the system that are optional. Providing data in these tables gives the state a more complete picture of the obligation, condition and costs of a facility. Populating this data may be required for other business processes in the future (such as the Six-Year Facilities Plan).

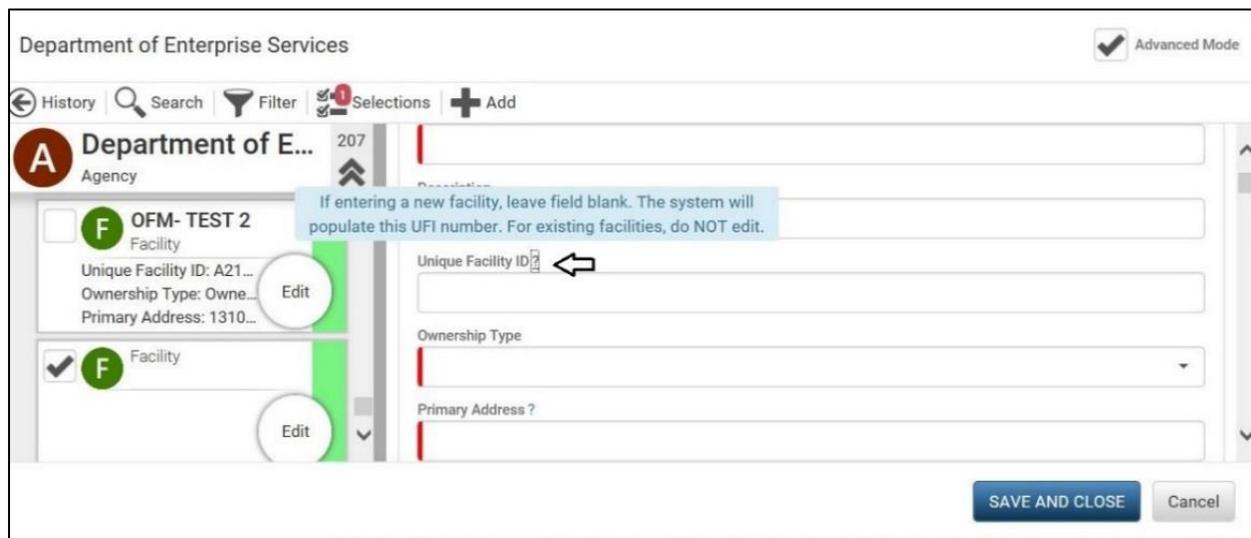
7.1.2 System Required Fields

Throughout the system there are fields that are marked with a red line on the left side of the field. These are system required fields which must be populated to save a record. However all data fields are an important part of understanding the state’s inventory, and many fields that are not system required are still required by other state laws or Executive Orders.

Therefore, to fully comply with state law, it is essential to populate all fields in each table as **completely** as possible.

7.1.3 Field Context Sensitive Help

Individual data entry fields on the properties form contain help language. Click on the question mark icon next to the field title for additional guidance. Some fields, such as the UFI, must be left blank and are auto-populated after saving the record. Additional guidance on specific fields is provided in the sections of this user manual.



7.2 Add a New Facility

Note: Before adding a new facility, search the current inventory to ensure the facility is not already included because it is occupied by another agency or was previously obligated to the state. Search instructions are provided in [Section 6.2.3.5: Geographical Search](#).

The facility table contains information about the overall building. Refer to [Appendix B: Definition of a Facility](#) for more information. The **Add** function can be accessed from the **Data Menu** on the **Agency** tile. Agency users will only see the **Add** option on their assigned agency.

Click on the three-line menu  on your agency tile to open the **Data Menu**.

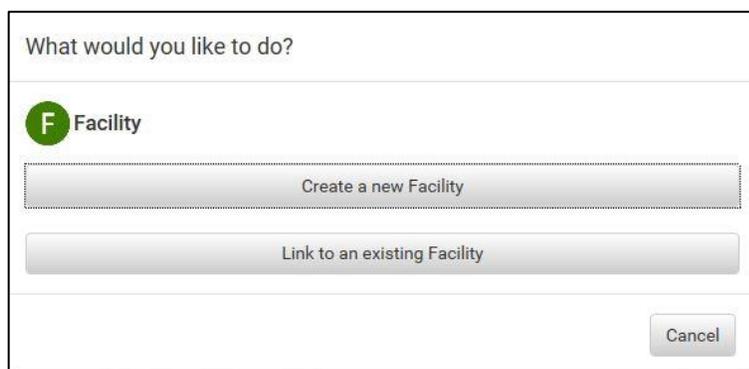
Click Add.

Based on the current navigation context, a list appears with the types of entities you can add, as shown below.



Select Facility from the list.

Upon selecting **Facility** a dialog box appears, as shown.



Two options exist:

3. **Create a new Facility** – create a new facility and fill in associated attributes.

2. **Link to an existing Facility** – create a relationship between two entities without creating a new entity. This option is available on all entities, but will not be used for most business processes.

Always select **Create a new Facility**. The option to link to an existing entity is available, but there are no business processes for the state of Washington where new facilities will be linked to existing facilities.

After clicking **Create a new Facility**, a window appears, as shown below. A list of items related to your current selection appears in the Tile list, and the desired item is selected. Enter data in the Facility **Properties** section.

The screenshot shows the 'Facility Properties' form in the Department of Enterprise Services application. The left sidebar displays a list of facility categories with counts: OFM-TEST 2 (Facility), Leased Facilities (LF), Owned Facilities (OF), Receivable Leased Facilities (RLF), and State of Washington (SOW). The main form area contains the following fields:

- Name
- Description
- Unique Facility ID?
- Ownership Type
- Primary Address?
- Secondary Address?
- Alternative Address?
- City
- City - Out of State?

At the bottom right of the form, there are two buttons: 'SAVE AND CLOSE' and 'Cancel'.

Note: You cannot save the record if validation errors are present, if required fields are left blank or if a duplicate address associated with a Unique Facility Identifier (UFI) exists in the system.

Once all fields are populated, click **SAVE AND CLOSE**.

7.2.1 Name

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

Example: 1313 N 13th Ave - BLDG 1W165000

7.2.2 Ownership Type

Owned is a facility owned by the agency.

Leased is a facility that is contracted by the state through a lease or related document (MOU, inter-agency agreement).

If an agency is used by the state, but is not owned or leased, select **Other**. If a facility is marked as **Other** it will not be included in FIS.

7.2.3 Location Information

The system allows several ways to capture location information.

PRIMARY ADDRESS – This is the legal address. The legal address is defined as the local jurisdiction’s address of record. Refer to the [USPS Addressing Standards](#). The system will require a secondary address upon saving a new facility, if a facility with the same primary address already exists.

Note: The address must be exact for the system to match the fields and find a validation error. Make sure to check your agency facilities records when entering a new address. If using the same primary address for multiple facilities, enter each primary address in the exact same formatting (example: 1310 Jefferson St or 1310 Jefferson Street)

SECONDARY ADDRESS – This is the secondary designator, such as building (BLDG) number or name. You **must** include a secondary address if the primary address already exists in the system.

ALTERNATIVE ADDRESS – Populate this field only if the facility has another address besides the facility address (e.g. the mailing address is different from the legal address).

PARCEL NUMBER – This is the county parcel number for the property. This information is commonly found on a county assessor’s website.

7.2.4 Homeland Security Regions

The Homeland Security Region is populated based on the County value assigned by the agency.

7.2.5 Adding an Out of State Facility

The majority of state facilities are located within the state. For facilities that are located outside of the state, select **Out of State** at the bottom of the drop down list on the City, County, and Legislative District fields.

Note: If you choose the **Out of State** value for the City field, you must also populate **The City – Out of State** field is the selected. If not, you will receive an error message.

7.2.6 Geocode a New Facility

When you open the three-line menu to review coordinates information, the **longitude** and **latitude** fields will be blank if you have not manually entered a value, until you geocode the facility on the map.

You can geocode the facility prior to **SAVE AND CLOSE** or you can edit after saving.

- To edit before prior to **SAVE AND CLOSE**, scroll down to the bottom of the properties list. Select **Edit Geometry**

- To edit after saving, navigate to the new **facility** and click on the three-line menu  to open the details menu.

Click **Edit**

Scroll down to the bottom of the properties list. Select **Edit Geometry**

1018 Capitol Way S - Data Manager Advanced Mode

OFM Validation Date 

HRMS  No

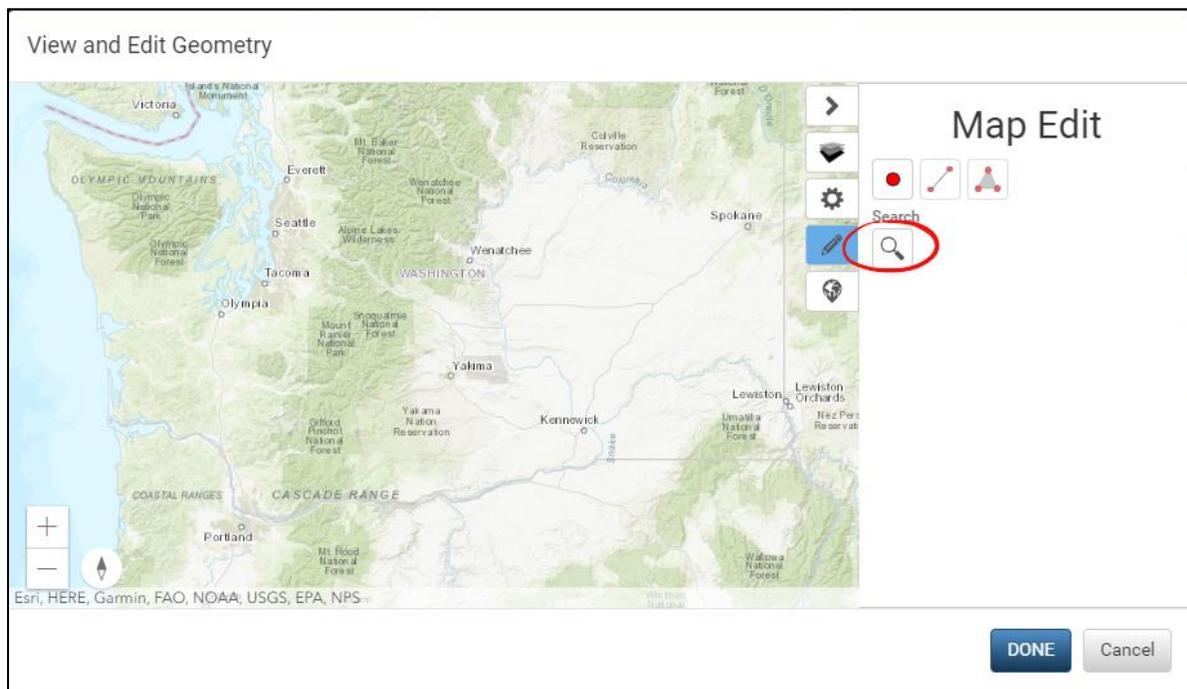
Comment

Date Last Updated
4/10/2019

Edit Geometry

SAVE AND CLOSE Cancel

The **Map Edit** menu will open as shown below. Click **search**



The Map Search will open. Type in the address in the search box. Drop down options may appear. Then click **Place Point at Selection**.

Map Search

Search
1018 Capitol Way S, Olympia, WA, 98501, USA

Search Suggestions

- 1018 Capitol Way S, Olympia, WA, 98501, USA
- US Bank, 402 Capitol Way S, Olympia, WA, 98501, USA
- Olympia Inn, 909 Capitol Way S, Olympia, WA, 98501, USA

PLACE POINT AT SELECTION Cancel

You may find that the point geocodes to a street or an area outside of the facility.



To move, **click** on the point. The point color will change to a light blue.

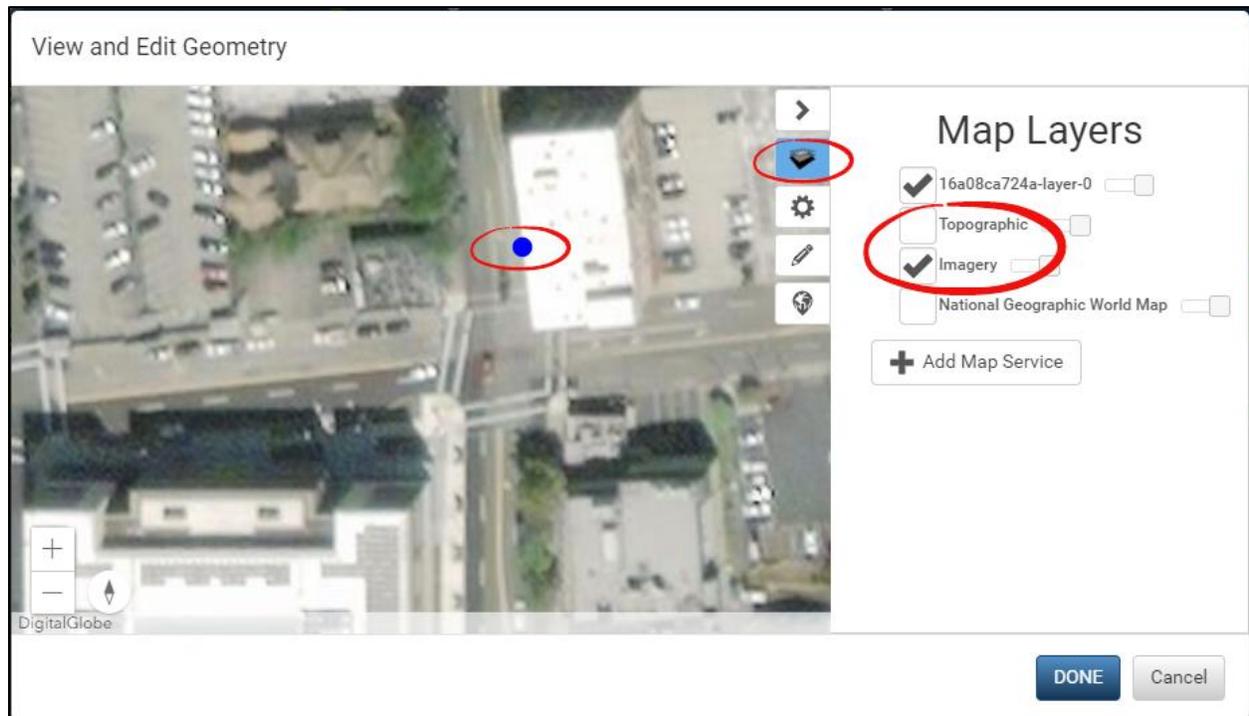
Drag the point to the correct location.

Click **Finish Drawing**

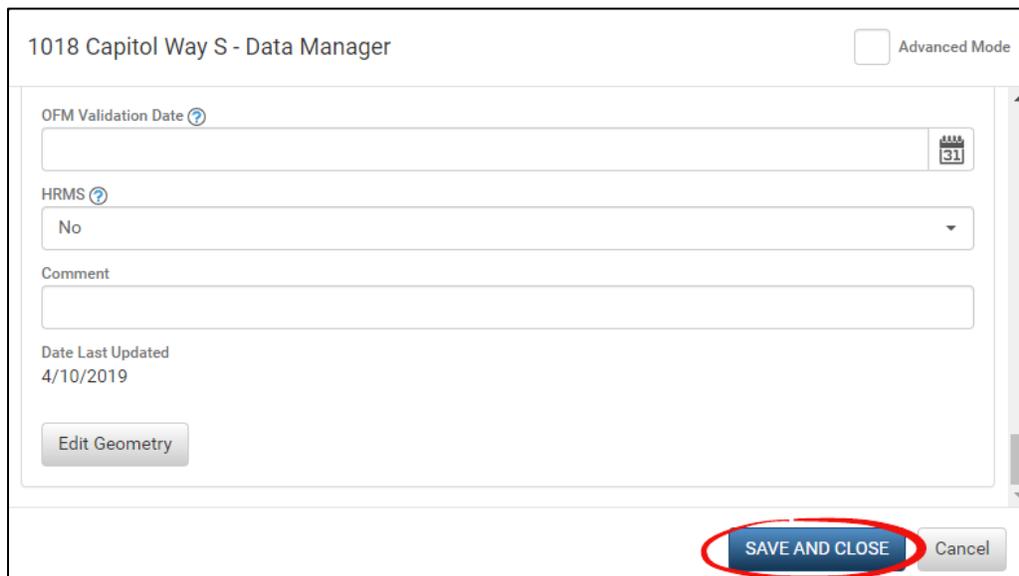
Click **Done**



Note: To display the imagery layer click the map settings icon, uncheck the topographic layer and check the Imagery layer.

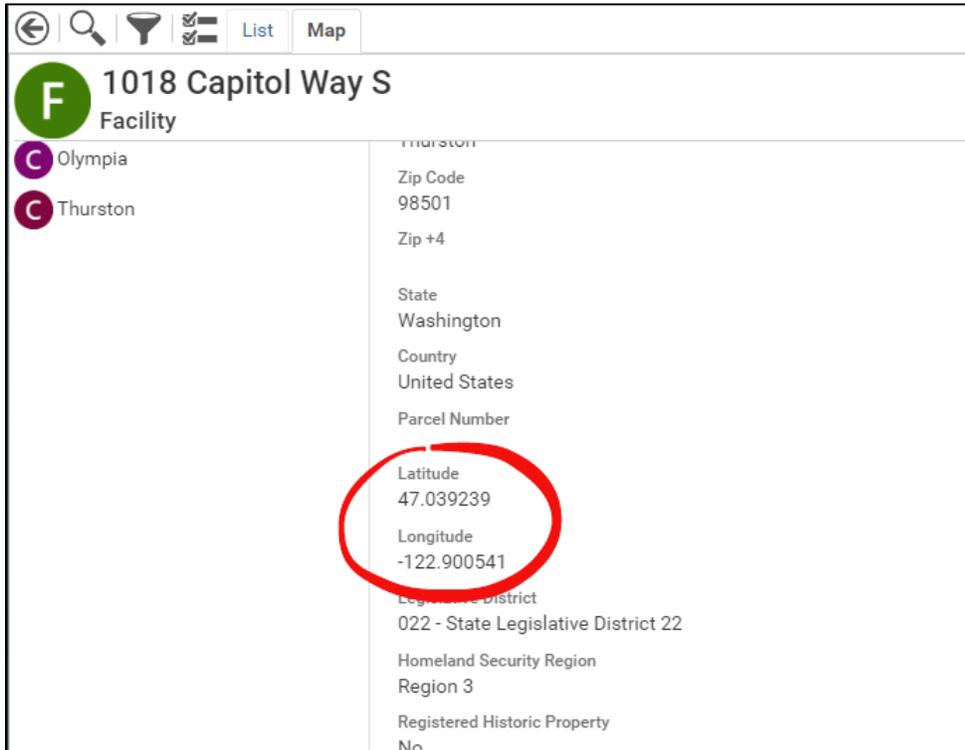


Click **SAVE AND CLOSE** on the properties table.



Click the menu  on the **Facility** tile.

The Latitude and Longitude fields should now be populated and a facility badge should be displayed on the map. 



Note: Agencies are responsible for validating their facility data, including map points. If you do not know where a map point should be located, refer to your legal documents.

7.2.7 New Facility Approval

After you save the new facility, the status will auto-update to **Pending Approval**.

You can review the status and details by selecting the new facility and clicking on the three-line

menu .

F Add New Facility Data	
Facility	
Total Leased Square Feet	
Property Type	Facility - A facility is defined as a building or other structure with at least one wall, a roof and a permanent foundation, regardless of occupancy.
Property Class	Office - (300 Series)
Surplus	No
Campus Identification Number	
Conditioned Space	
Portfolio Management Identification Number	
Parent Portfolio Management Identification Number	
Facilities Inventory System	Yes
Facility Status	Active
Active Date	4/19/2017
Inactive Date	5/17/2017
OFM Validation Date	
HRMS	No
Comment	

OFM system administrators will receive notification that a new facility has been created and the agency will be copied. OFM will validate key data and mark the facility as approved.

The agency user will receive a notification when the facility is approved.

Note: You can still add, edit and link data while the facility is pending approval.

Once the new facility is approved, the active date on the facility entity will auto-update.

Note: Pending Approval status will affect facilities counts in reports. If you are planning on running reports, it is best to add new facilities 5 calendar days in advance to allow time for approval.

7.3 Edit Facility Details

You can **Edit** the Facility details for your agency. The **Edit** function can be accessed from the **Data Menu**.

Click on the three-line menu  on the facility tile to **open** the **Data Menu**.

Click Edit.  Edit

The **Properties** list will appear. Make desired changes and click **SAVE AND CLOSE**

Note: Editing the Facility details differs from making changes such as updating an address. Address changes must be verified by OFM. Contact Facilities Oversight at fpmtsupport@ofm.wa.gov or call 360-407-2611 for assistance.

7.4 Add an Owned Facility

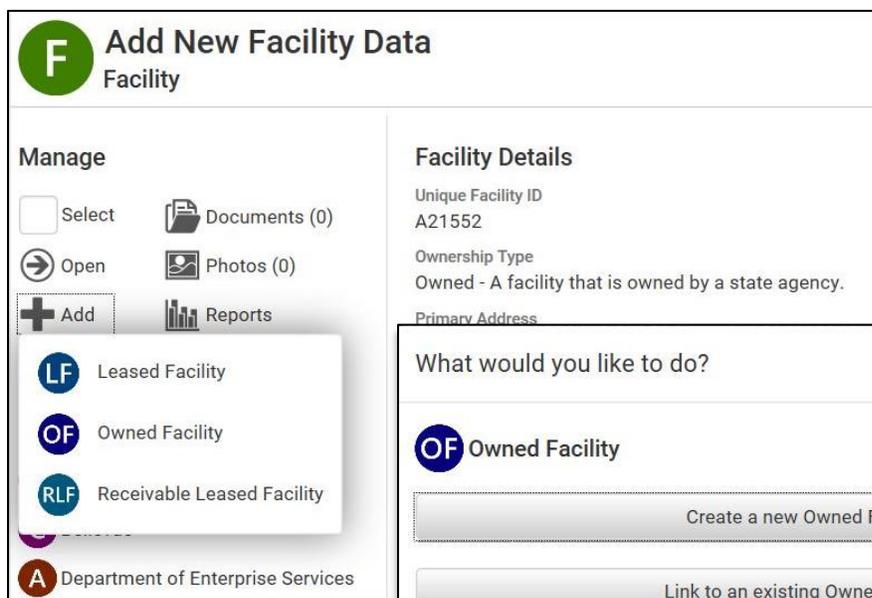
When a new facility is added, the agency-specific and owned facility-specific data will need to be linked to the facility by adding an **Owned Facility**. The Owned Facility entity will update the facility record with details such as the square footage. An Owned Facility can be added as soon as a certificate of occupancy is issued.

Navigate to the new facility (see section [6.2.2 Search Tool](#))

Open the data menu by clicking on 

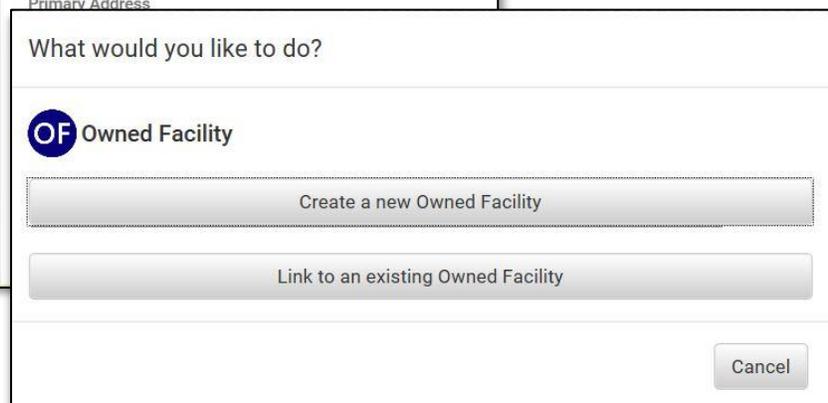
Click Add  Add

Select Owned Facility 



On the dialog box that appears select **Create a new Owned Facility**.

Enter data in the Properties section like when you added a new facility in the previous section (7.1).



7.4.1 Name

The name field for Owned Facilities should start with the agency SAAM acronym, then the agency common name. **Example:** DSHS-19-Auditorium

Once all fields are populated, click **SAVE AND CLOSE**.

Note: The system will create a link between the **Facility** entity and the **Owned Facility** entity. The square footage from the **Owned Facility** will roll up to the **Facility** details menu.

7.5 Add a Space to an Owned Facility

The **Space** entity captures details about how the property is used. Each facility is required to have at least one space entity associated with it. If you have multiple space types, consider adding spaces under the **Owned Facility** entity.

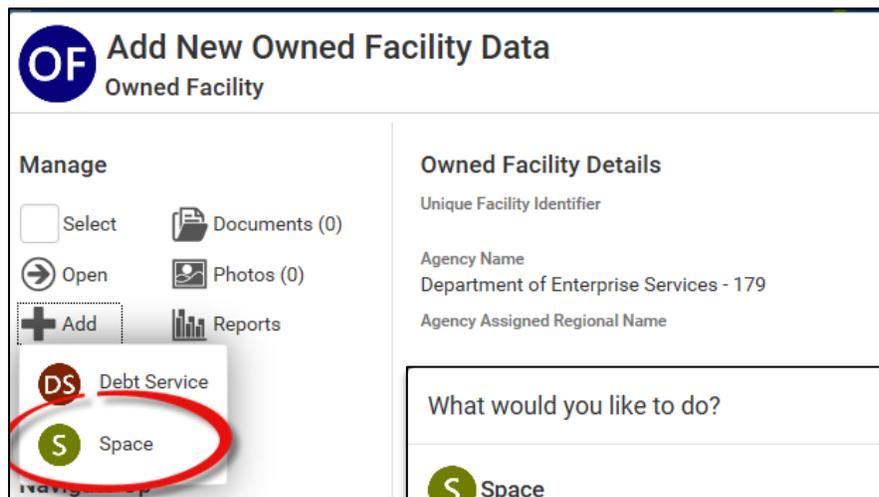
For example, a facility may include 10,000 square feet of office space and 2,000 square feet of laboratory space.

Open the Owned Facility tile

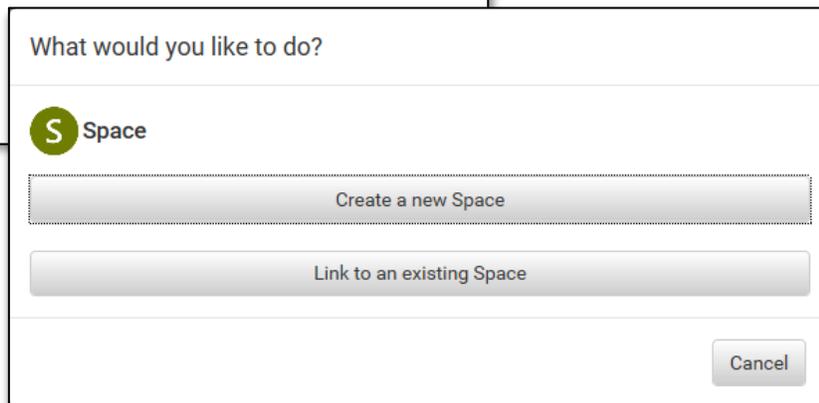
Open the data menu by **clicking** on 

Click Add  Add

Select Space 



On the dialog box that appears, **select Create a new Space.**



Enter data in the Space Properties section.

0001 - Data Manager Advanced Mode

← Space Properties ↑

Name
0001

Description

Unique Facility ID
A25665

Agency
Department of Natural Resources - 490

Lease Number ?

Space ID ?
0001

Receivable Lease Number ?

Tenant ?
Department of Natural Resources - 490

SAVE AND CLOSE Cancel

Once all fields are populated, click **SAVE AND CLOSE**.

History Search Filter Selections

OF New Owned Facility Data 3
Owned Facility

A Agencies 1

F Facilities 1

S Spaces 1

S New Space
Space
Unique Facility ID: A21552
Agency: Department of Enterprise Services - 179
Lease Number: Open

When you open the **Owned Facility** tile, you will now see a **Space** tile entity with the data you just created, as shown below.

7.5.1 Name

The name can be any number or short name that helps a user identify the space within a facility. Example: Lab Space.

If you do not have a current system for assigning space names, the generic values populated in the system are based on a three-character number. Example: 001.

7.5.2 Square Footage

The square footage should be for this space only. The sum of all Space square feet, and receivable lease square feet cannot exceed the total **Owned Facility** square feet.

The primary space type for the facility will be the space type with the most square footage. Refer to [Appendix D: Facility Square Footage Measurement](#).

7.5.3 Primary Space Type

Refer to [Appendix C: Property Class & Space Type Categories](#) for detailed definitions.

7.6 Use the Condition Matrix to Update Owned Facility Condition

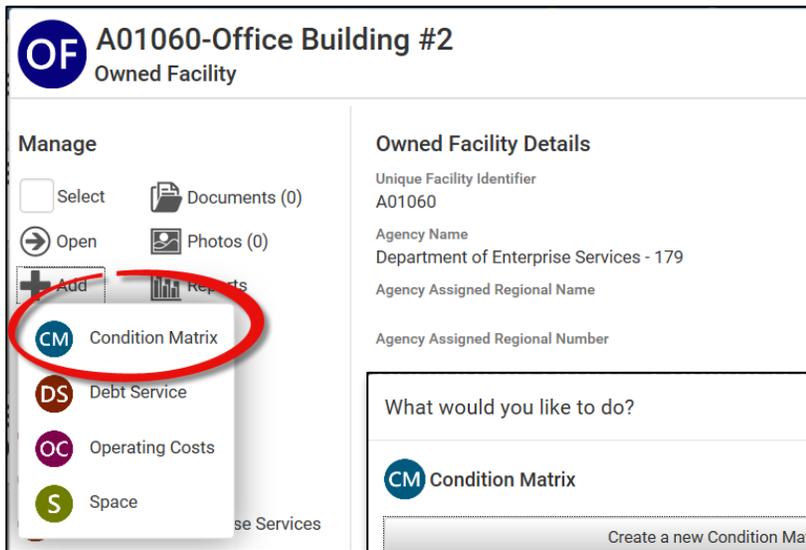
The Condition Matrix is not a required entity. You may use this entity to populate the condition field on the Owned Facility entity. Refer to [Appendix E: Condition Matrix](#) for details.

On the **Owned Facility** tile

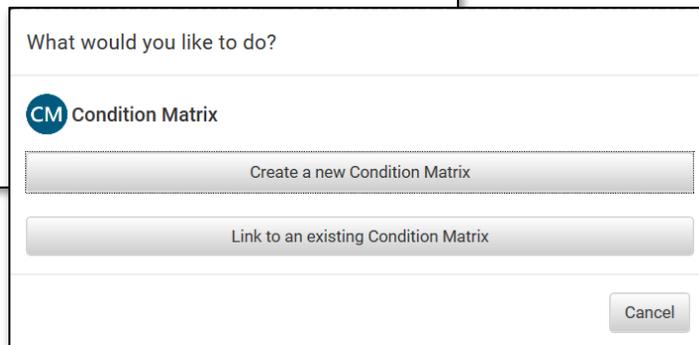
Open the **data menu** by clicking on 

Click **Add**  Add

Select **Condition Matrix** 



On the dialog box that appears select **Create a new Condition Matrix**.



Enter data in the Condition Matrix Properties section.

Note: All condition fields are required

Once all fields are populated, click **SAVE AND CLOSE**.

7.6.1 Name

Use the UFI and the fiscal year. **Example: A10825 – FY 2017**

A01060-Office Building #2 Owned Facility	
C Bellevue	Agency Assigned Associated Complex, Campus, Regional Center
A Department of Enterprise Services	East Capitol Campus
C Thurston	Square Feet 379,204
LD State Legislative District 22	Square Feet Measurement Type GROSS
F 1115 Washington St Se	Condition Assessment Score Adequate - 2
	Year Constructed 1975
	Year Purchased
	Year Last Major Renovation
	Original Construction Cost \$19,000,000.00
	Original Purchase Price
	Cost Last Major Renovation

The system will average all of the condition scores in the **Condition Matrix** table. This number will populate the **Condition Assessment Score** on the **Owned Facility** table.

7.7 Add Operating Costs

The **Operating Costs** entity is only a required entity for facilities in the state six-year facilities plan. It is not required for those facilities that are only in the Facilities Inventory.

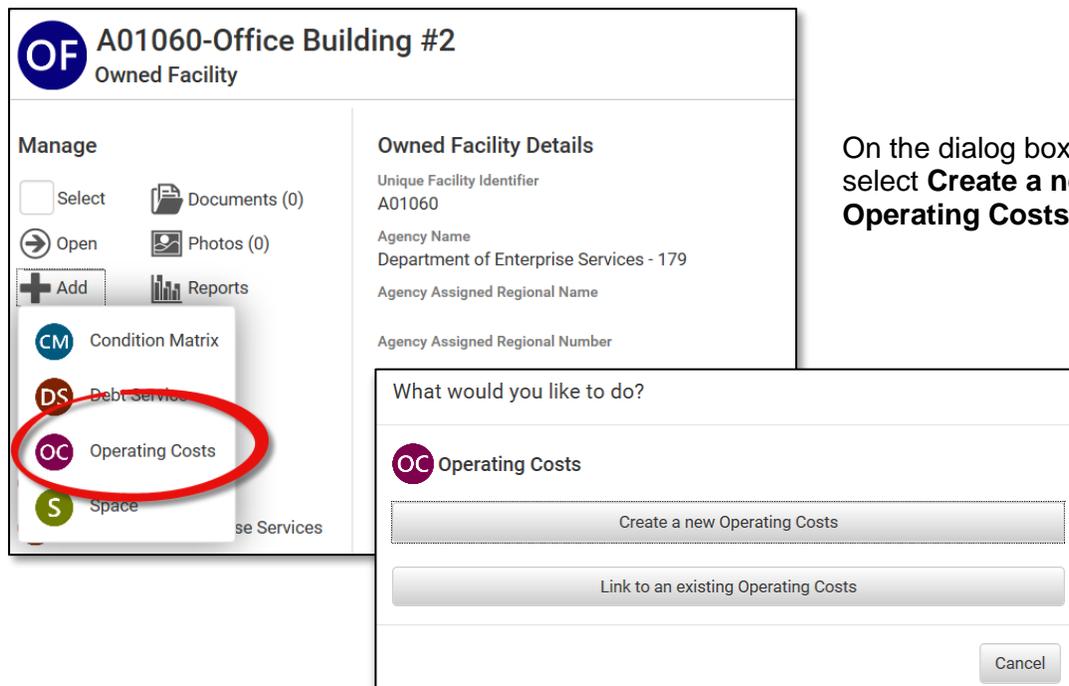
You can store the facility operating costs data on the **Operating Costs** table.

On the **Owned Facility** tile

Open the data menu by clicking on 

Click Add  Add

Select **Operating Costs** 



The screenshot shows the 'Owned Facility' page for 'A01060-Office Building #2'. The 'Manage' menu is open, and the 'Operating Costs' option is highlighted with a red circle. A dialog box titled 'What would you like to do?' is displayed, with the 'Create a new Operating Costs' button selected.

On the dialog box that appears select **Create a new Operating Costs**.

Enter data in the Operating Costs Properties section.

The screenshot displays the 'Operating Costs Properties' form for 'A01060-Office Building #2'. The interface includes a top navigation bar with 'History', 'Search', 'Filter', 'Selections', and 'Add' options. A left sidebar shows a tile menu with 'A01060-Office Building #2' (Owned Facility) and sub-tiles for 'Agencies', 'Facilities', 'Operating Costs', and 'Spaces'. The main form area contains the following fields:

- Name
- Description
- Operating Costs ID
- Unique Facility Identifier? (A01060)
- Lease Number?
- Assessment Annual Cost
- Bulbs/Tubes Annual Cost
- Natural Gas Annual Cost
- Electric Annual Cost

At the bottom right of the form, there are 'SAVE AND CLOSE' and 'Cancel' buttons.

Once all fields are populated, click **SAVE AND CLOSE**.

The **Operating Costs** tile will now appear in the tile menu under **Owned Facility**.

7.7.1 Name

Use the the Operating Costs ID and fiscal year of the data input. **Example:** 1-FY 2017

7.7.2 Operating Costs ID

A numerical value assigned by the agency.

7.8 Add Debt Service Data to an Owned Facility

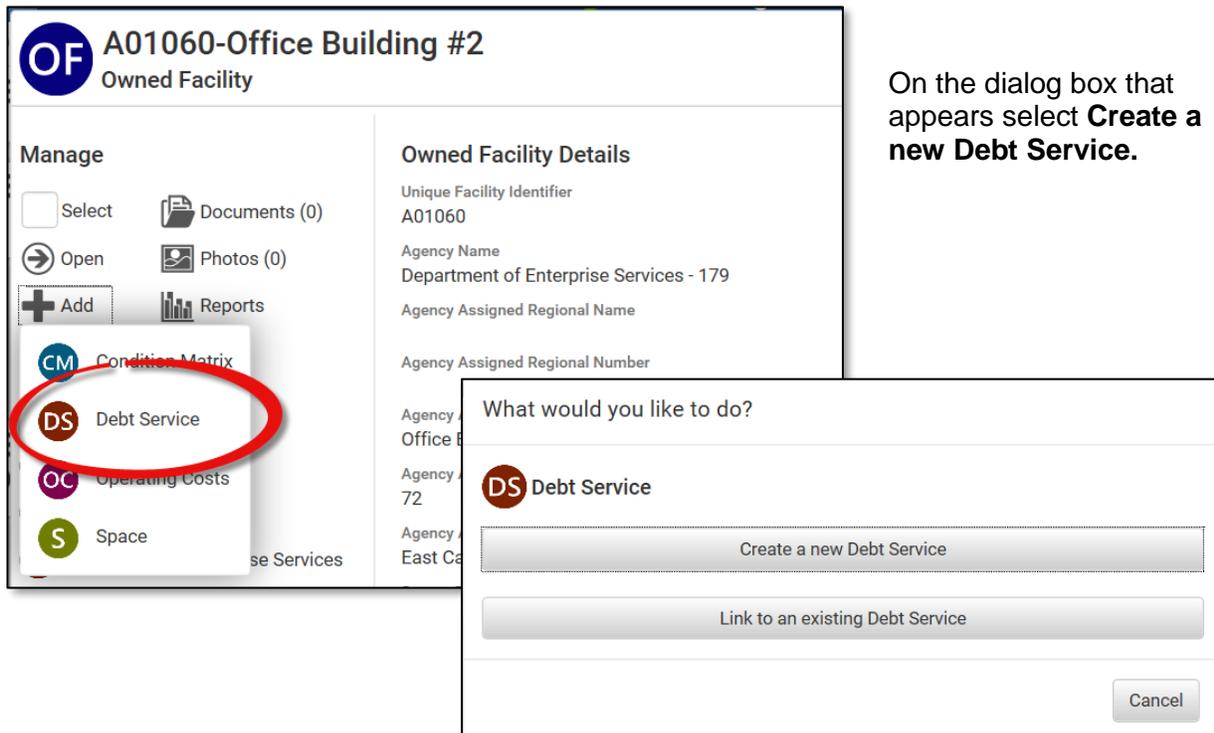
You can store the facility debt service details data on the **Debt Service** table.

On the **Owned Facility** tile

Open the **data menu** by clicking on 

Click **Add**  Add

Select **Debt Service** 



The screenshot shows the 'Owned Facility' interface for 'A01060-Office Building #2'. The 'Manage' section includes buttons for 'Select', 'Open', 'Add', 'Documents (0)', 'Photos (0)', and 'Reports'. The 'Add' menu is open, showing options: 'CM Condition Matrix', 'DS Debt Service' (circled in red), 'OC Operating Costs', and 'S Space'. The 'Owned Facility Details' section lists: 'Unique Facility Identifier: A01060', 'Agency Name: Department of Enterprise Services - 179', 'Agency Assigned Regional Name', and 'Agency Assigned Regional Number'. A dialog box titled 'What would you like to do?' is overlaid, with options: 'DS Debt Service', 'Create a new Debt Service' (highlighted), 'Link to an existing Debt Service', and 'Cancel'.

On the dialog box that appears select **Create a new Debt Service**.

Enter data in the Debt Service Properties section.

Once all fields are populated, click **SAVE AND CLOSE**.

The **Debt Service** tile will now appear in the tile menu under **Owned Facility**.

7.8.1 Name

Use the unique debt service ID found on your debt service documentation.

7.8.2 Unique Debt Service ID

Use the unique ID found on your debt service documentation. Same as **Name**.

7.9 Update an Owned Facility

You can **Update** any Owned Facility related table using these simple instructions. The **Edit** function can be accessed from the **Data Menu**.

Navigate to the table you wish to edit.

Click on the three-line menu  on the related tile to open the **Data Menu**.

Click **Edit**.  Edit

The **Table Properties** list will appear. Make desired changes and click **SAVE AND CLOSE**.

7.10 Transfer an Owned Facility

In limited cases an agency may need to transfer an owned facility to another agency. The current obligated agency will need to request the transfer through the system.

First, go to the Facility table and open the facility properties as in 7.2 Edit Facility Details.

Change the status to **Transfer-Transfer between two state agencies**, as shown below.

The screenshot shows the 'Add New Facility Data' form. The 'Facility Status' dropdown menu is open, displaying several options: 'Active', 'Inactive', 'Pending Approval', and 'Delete - Deleted because the record is incorrect or duplicate.' The option 'Transfer - Transfer between two state agencies' is highlighted in blue at the bottom of the list.

Include a comment noting the agency receiving the transfer.

The screenshot shows the 'Add New Facility Data' form with the 'Facility Status' dropdown set to 'Transfer - Transfer between two state agencies'. The 'Active Date' is 4/19/2017 and the 'Inactive Date' is 5/24/2017. The 'Comment' field contains the text 'Transfer to DSHS', which is circled in red. At the bottom right, there are 'SAVE AND CLOSE' and 'Cancel' buttons.

Click **SAVE AND CLOSE**

Send an email to the FPMT mailbox (FPMTSupport@ofm.wa.gov) notifying OFM of the requested transfer. Please cc the receiving agency when submitting the request to transfer. OFM will process the request, change the relationships in the system, update the assigned agency and send a confirmation note to both agencies of the change.

7.11 Inactivate an Owned Facility

In general, a facility or its associated data should never be deleted from the system. If a facility is no longer obligated to the state because it has been sold, demolished, or transferred it should be inactivated. An **Agency Administrator** can delete owned facilities data and associated data if it was created in error. For more information on how to delete a record from the system see section [6.7: Delete an Entity](#). An **Agency User** cannot delete any data from the system.

A **Facility** can only be deleted from the system by **the OFM Facilities Administrator**. Any other user can only make a **Facility** active or inactive. Contact OFM if a facility record was created error.

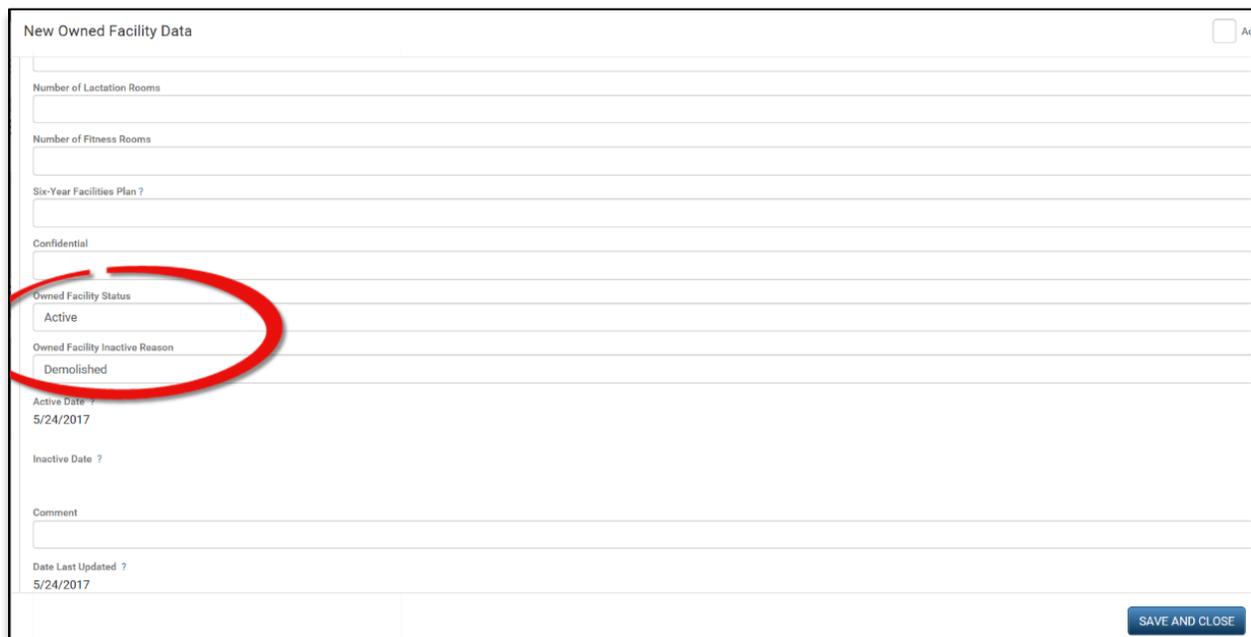
The **Owned Facility** must be inactivated before **Facility** can be inactivated.

On the **Owned Facility** tile 

Open the **data menu** by clicking on 

Click **Edit**  Edit

On the **Properties** table, change the **Owned Facility Status** to **Inactive**.



Populate the **Owned Facility Inactive Reason** field. This field must be populated to inactivate the record.

Click **SAVE AND CLOSE**.

The Inactive Date field will auto-populate.

Note: Inactivating the **Owned Facility** will also inactivate any linked spaces.

The **Facility** remains **Active** even after the **Owned Facility** is inactive.

On the **Facility** tile



Open the **Data Menu** by clicking on



Click **Edit**  Edit

On the Facility **Properties** table, change the **Facility Status** to **Inactive**.

Note: Inactivating a facility will remove it from standard reports, including agency facility roll ups.

8. State of Washington Business Processes

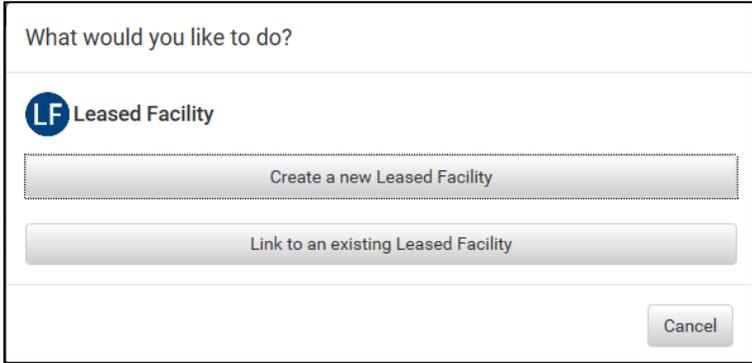
- Leased Facilities

8.1 Add a Leased Facility

If the Facility that is leased does not exist in the system, follow the steps in [7.2 Add a New Facility](#). Then follow the steps below to add all lease facilities related data as instructed in the [minimum data requirements](#) section above.

- Navigate** to the Facility 
- Open** the **data menu** by clicking on 
- Click** Add  Add
- Select** Leased Facility 

Upon **selecting** Leased Facility a dialog box appears, as shown.



The dialog box has a title bar that says "What would you like to do?". Below the title bar, there is a section header "LF Leased Facility" with a blue circle icon containing "LF". Underneath, there are two buttons: "Create a new Leased Facility" and "Link to an existing Leased Facility". At the bottom right, there is a "Cancel" button.

Two options exist:

1. **Create a new Leased Facility** – create a new Leased Facility and fill in associated attributes.
2. **Link to an existing Leased Facility** – create a relationship between two entities without creating a new entity. This option will be used for receivable leases.

Note: Always select **Create a new Leased Facility** when adding a leased facility into the inventory.

Upon clicking **Create a new Leased Facility**, a window appears, as shown below. A list of items related to your current selection appears in the Tile list, and the desired item is selected. Enter data in the Leased Facility Properties section.

The screenshot displays the 'Leased Facility Properties' form for the facility '1222 State Ave Ne'. The interface includes a sidebar with a 'Tile list' containing categories: Agencies, Cities, Counties, Leased Facilities (selected), Legislative Districts, and Spaces. The 'Leased Facilities' tile is expanded, showing two items: one with ID 'SRL 11-0158' and another selected. The main form contains the following fields: Name, Description, Unique Facility Identifier (A05328), Lease Number, Lessee (Agency Name), Agency Assigned Regional Name, Agency Assigned Regional Number, Agency Assigned Common Name, Agency Assigned Number, Agency Assigned Associated Complex, Campus, Regional Center, Condition Assessment Score, and Year First Leased. A 'SAVE AND CLOSE' button is located at the bottom right of the form.

Once all fields are populated, click **SAVE AND CLOSE**.

Note: You cannot save the record if validation errors are present, if required fields are left blank or if a duplicate address exists in the system.

8.1.1 Name

The name field for Leased Facilities should start with the agency SAAM acronym, then the agency common name. **Example:** ES-Yakima Worksource

8.1.2 Lease Number

Use the assigned number on the lease contract. Example: SRL 11-0158.

8.2 Add a Lease Contract to a Leased Facility

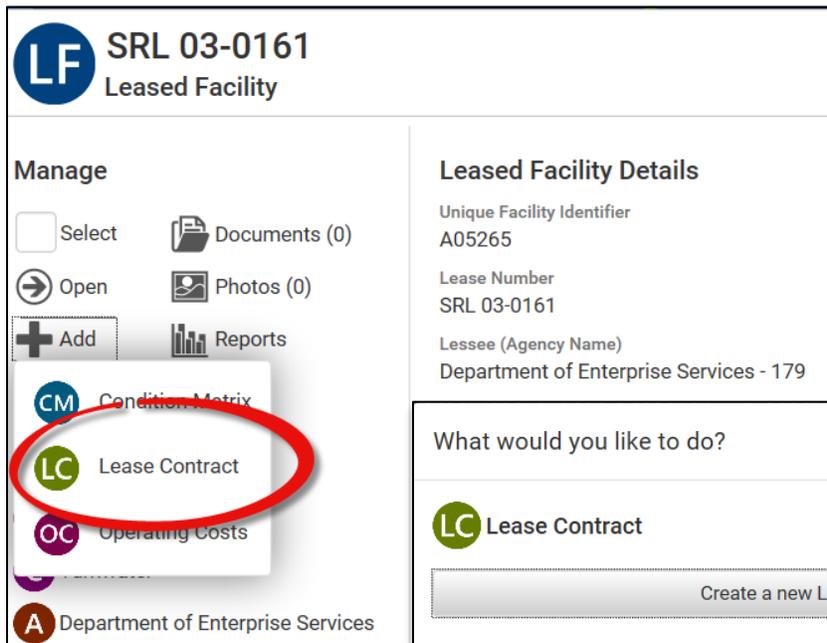
All **Leased Facilities** must have an associated **Lease Contract**.

Open the new **Leased Facility** tile

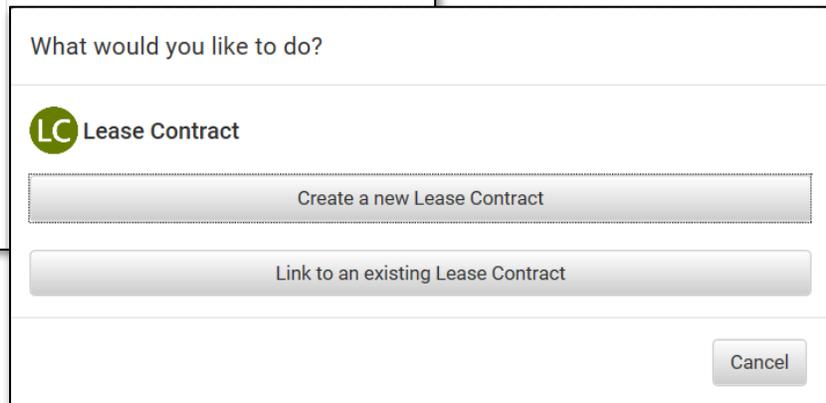
Open the **data menu** by clicking on 

Click **Add**  Add

Select **Lease Contract** 



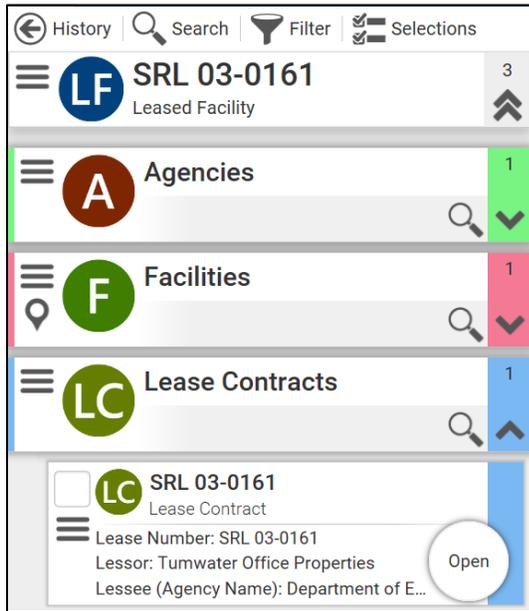
On the dialog box that appears select **Create a new Lease Contract** if a contract has not already been created.



Note: A lease contract may be associated with multiple leased facilities. If a Lease Contract has already been created in the system and associated with another lease facility, it can also be associated with a new leased facility by selecting **Link to an existing Lease Contract**.

Enter your agency data in the **Lease Contract Properties** section.

Once all fields are populated, click **SAVE AND CLOSE**.



When you open the **Leased Facility** tile, you will now see an associated **Lease Contract** tile with the data you just created.

8.2.1 Name

Use the lease contract number. Example: SRL 03-0161

8.2.2 Lease Number

This is the assigned number on the lease contract. This must match the lease number on the leased facility or facilities. Example: SRL 11-0158.

8.3 Add a Lease Payment to a Lease Contract

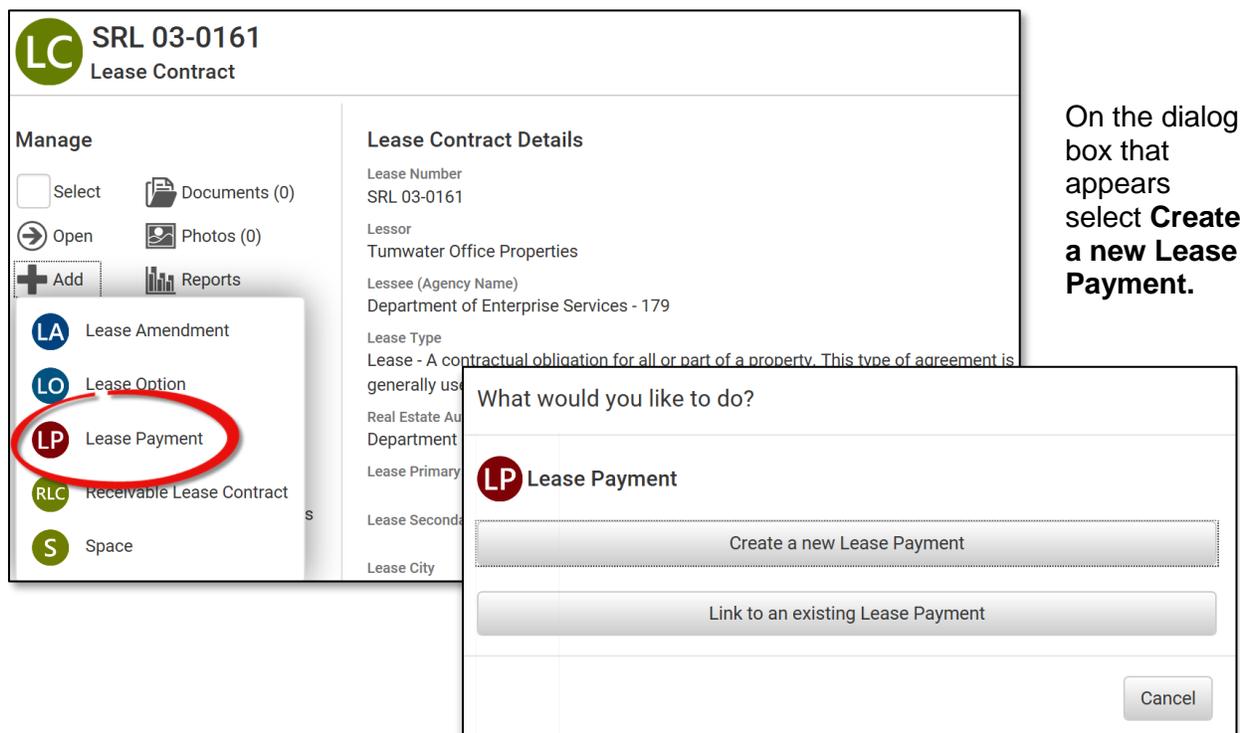
Add all lease payments specific in the lease contract. The system allows both current and future contracted lease payments to be added when the lease is executed.

Open the new **Lease Contract** tile.

Open the **data menu** by clicking on 

Click **Add**  Add

Select **Lease Payment** 



LC SRL 03-0161
Lease Contract

Manage

- Select
- Documents (0)
- Open
- Photos (0)
- +** Add
- Reports

- LA** Lease Amendment
- LO** Lease Option
- LP** Lease Payment
- RLC** Receivable Lease Contract
- S** Space

Lease Contract Details

Lease Number
SRL 03-0161

Lessor
Tumwater Office Properties

Lessee (Agency Name)
Department of Enterprise Services - 179

Lease Type
Lease - A contractual obligation for all or part of a property. This type of agreement is generally used for the use of real estate.

Real Estate Agency
Department of Enterprise Services

Lease Primary

Lease Secondary

Lease City

What would you like to do?

- LP** Lease Payment

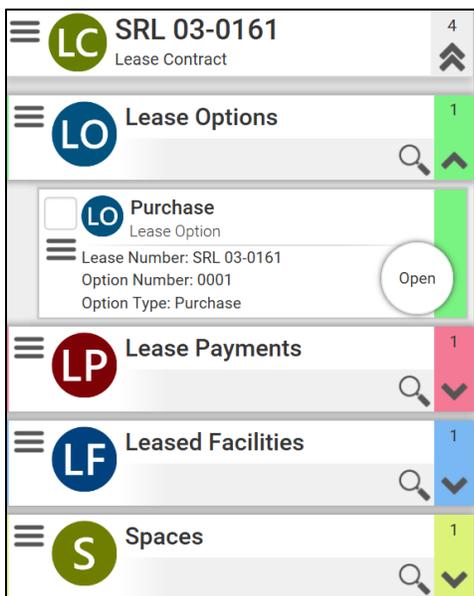
- Create a new Lease Payment
- Link to an existing Lease Payment

Cancel

On the dialog box that appears select **Create a new Lease Payment**.

Enter your data in the **Lease Payment Properties** section.

Once all fields are populated, click **SAVE AND CLOSE**.



When you open the **Lease Contract** tile, you will now see an associated **Lease Payment** tile with the data you just created.

8.3.1 Name

Use the Payment Type and Payment Series number in the name field. **Example:** Base Rent - 1

8.3.2 Payment Series Number

Payment series should be numbered sequentially. Example: 1, 2, 3.

8.4 Add a Space to a Lease Contract

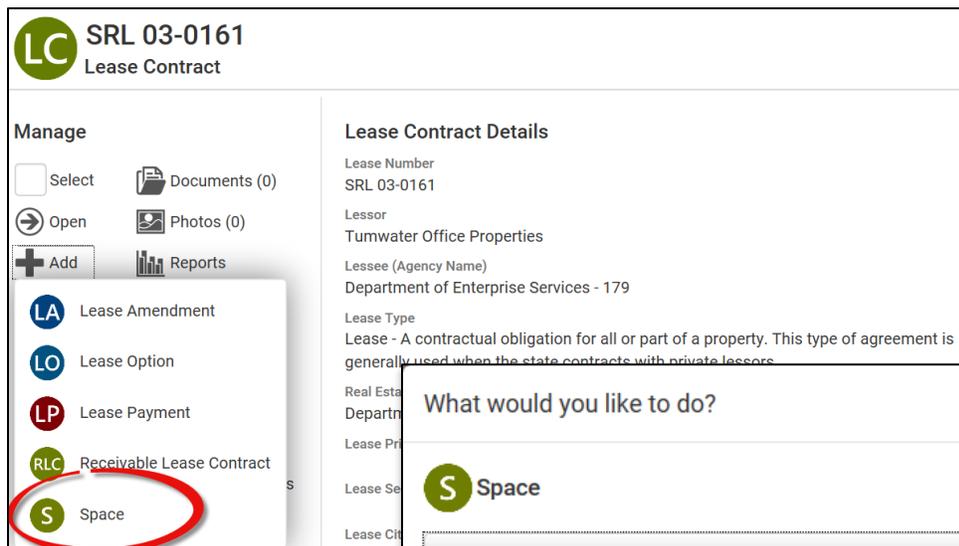
The **Space** entity captures details about how the property is used. Each facility is required to have at least one space entity associated with each **Lease Contract**. If you have multiple space types, consider adding additional spaces under the **Leased Facility** entity. For example, a facility may include 10,000 square feet of office space and 2,000 square feet of laboratory space.

Open the **Leased Facility** tile 

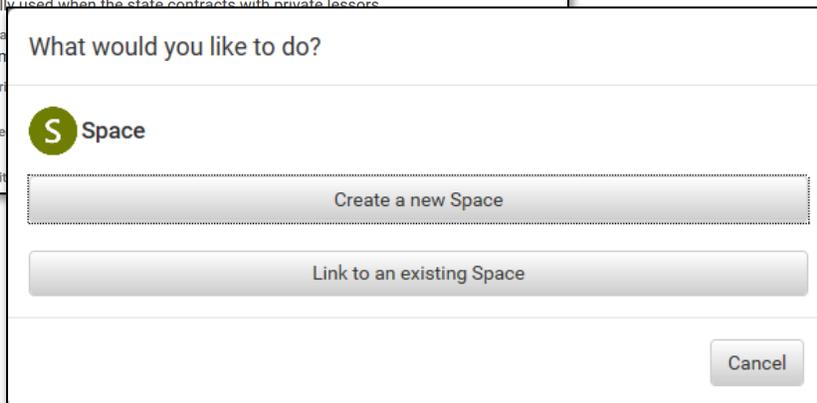
Open the **data menu** by clicking on 

Click **Add**  Add

Select **Space** 



On the dialog box that appears select **Create a new Space**.



Enter data in the Space Properties section.

Note: The space type with the most square footage assigned will automatically change the facility **Primary Space Type**. Example: A facility with 10,000 square feet of office space and 5,000 square feet of lab space will have a Property Class of **office**.

Once all fields are populated, click **SAVE AND CLOSE**.

The system will create a link between the space and both the **Lease Contract** and the **Facility**. When you open the **Lease Contract** tile, you will now see a **Space** tile entity with the data you just created.

The **Space** entity will also appear under the **Facility** tile menu.

8.4.1 Name

The name can be any number of short name that helps a user identify the space within a facility.
Example: Lab Space.

If you do not have a current system for assigning space names, the generic values populated in the system are based on a three-character number. **Example:** 001.

8.4.2 Square Footage

The sum of all **Space** square feet, lease and receivable lease, cannot exceed the total **Lease Contract** square feet.

8.5 Add a Lease Option to a Lease Contract

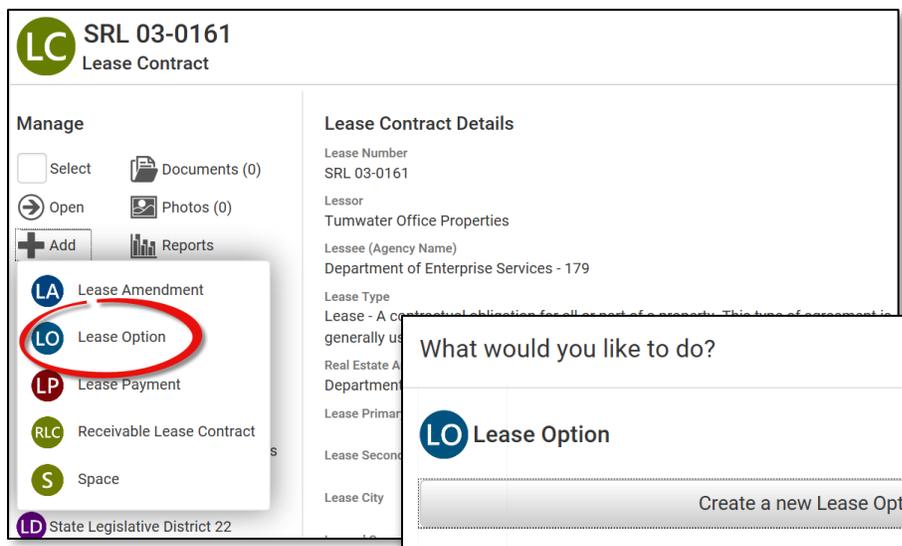
The **Lease Options** entity is not a required entity. Use this table to provide data about unique options in the lease. The most common option types are cancellation clauses or options to purchase.

Open the **Lease Contract** tile 

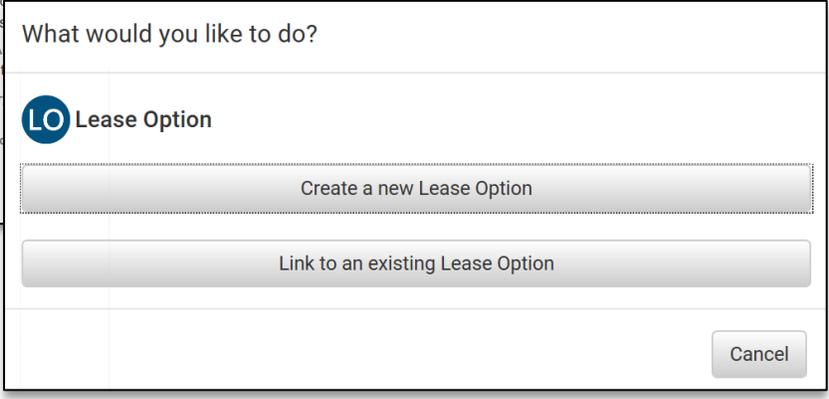
Open the **data menu** by clicking on 

Click **Add** 

Select **Lease Option** 



On the dialog box that appears select **Create a new Lease Option**.



Enter your data in the **Lease Option Properties** section.

Once all fields are populated, click **SAVE AND CLOSE**.

When you open the **Lease Contract** tile, you will now see a **Lease Options** tile entity with the data you just created.

8.5.1 Name

The name should be the option type and the option number. **Example:** Cancel-1.

8.5.2 Option Number

Options should be numbered based on the order they appear in the lease contract. **Example:** 1, 2, 3.

8.5.3 Option Description

The option 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.

8.6 Add Operating Costs to a Leased Facility

The **Operating Costs** entity is only a required entity for facilities in the state six-year facilities plan. It is not required for those facilities that are only in the Facilities Inventory.

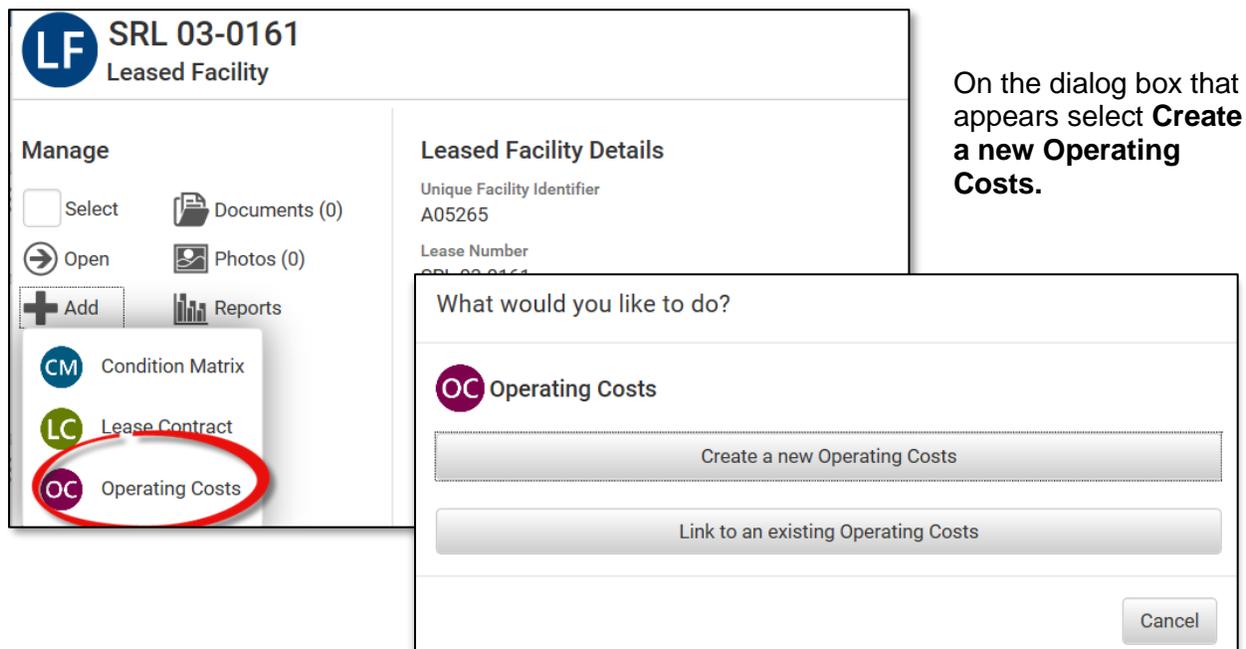
You can store the facility operating costs data on the **Operating Costs** table.

Open the **Leased Facility** tile 

Open the **data menu** by clicking on 

Click **Add** 

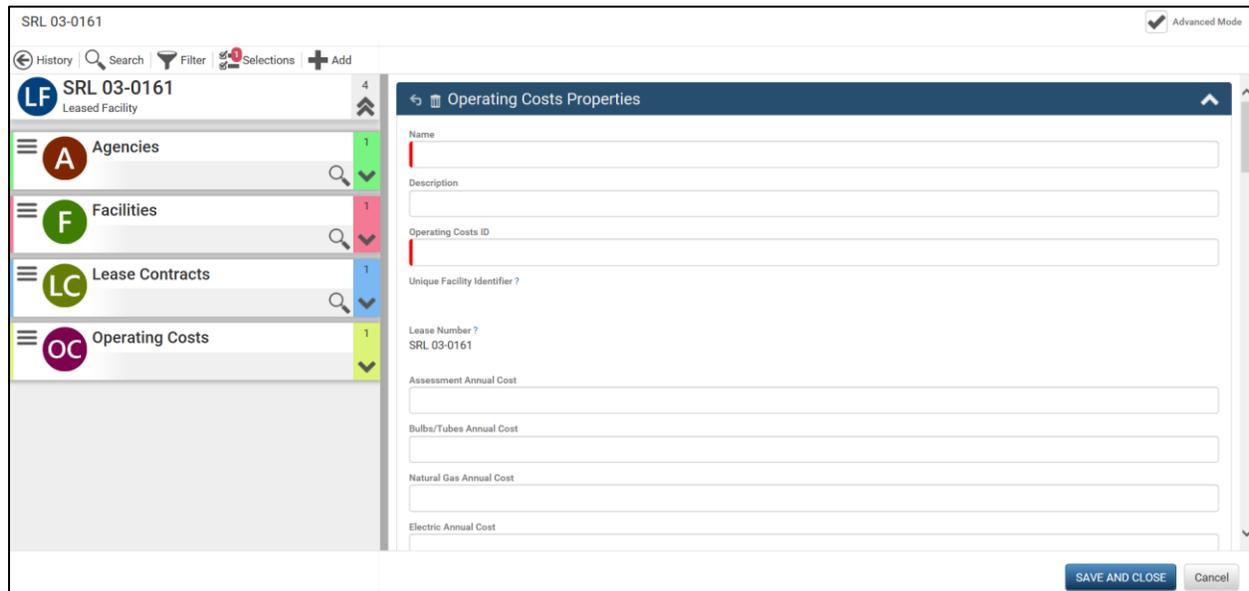
Select **Operating Costs** 



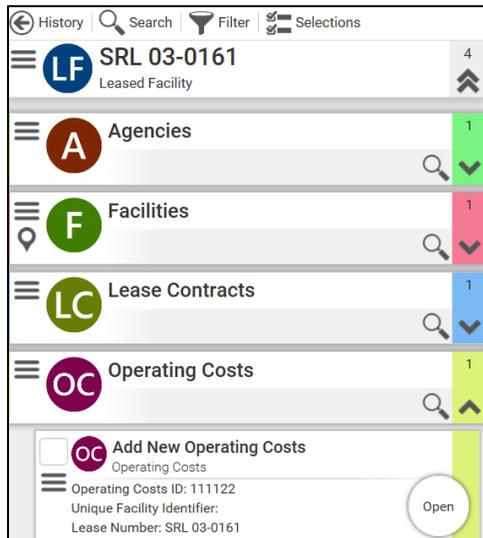
The screenshot shows the 'Leased Facility' interface for 'SRL 03-0161'. The 'Manage' section includes options for 'Select', 'Open', 'Add', 'Documents (0)', 'Photos (0)', and 'Reports'. The 'Add' menu is open, showing 'Condition Matrix', 'Lease Contract', and 'Operating Costs' (circled in red). The 'Leased Facility Details' section shows 'Unique Facility Identifier: A05265' and 'Lease Number: SRL 03-0161'. A dialog box titled 'What would you like to do?' is overlaid, with 'Operating Costs' selected. It contains two buttons: 'Create a new Operating Costs' and 'Link to an existing Operating Costs', with a 'Cancel' button at the bottom right.

On the dialog box that appears select **Create a new Operating Costs**.

Enter your data in the **Operating Costs Properties** section.



Once all fields are populated, click **SAVE AND CLOSE**.



When you open the **Lease Facility** tile, you will now see an **Operating Costs** tile entity with the data you just created.

8.6.1 Name

The name is the Operating Cost ID and the fiscal year of the data input. **Example:** 1 - FY2017

8.6.2 Operating Costs ID

Operating costs should be numbered based on the order they appear in the lease contract. **Example:** 1, 2, 3.

8.7 Add a Lease Amendment to the Lease Contract

Note: A **Lease Amendment** is added when a change in the terms of the original lease agreement such as rent increase or lease extension has been made through the execution of an amendment of lease agreement.

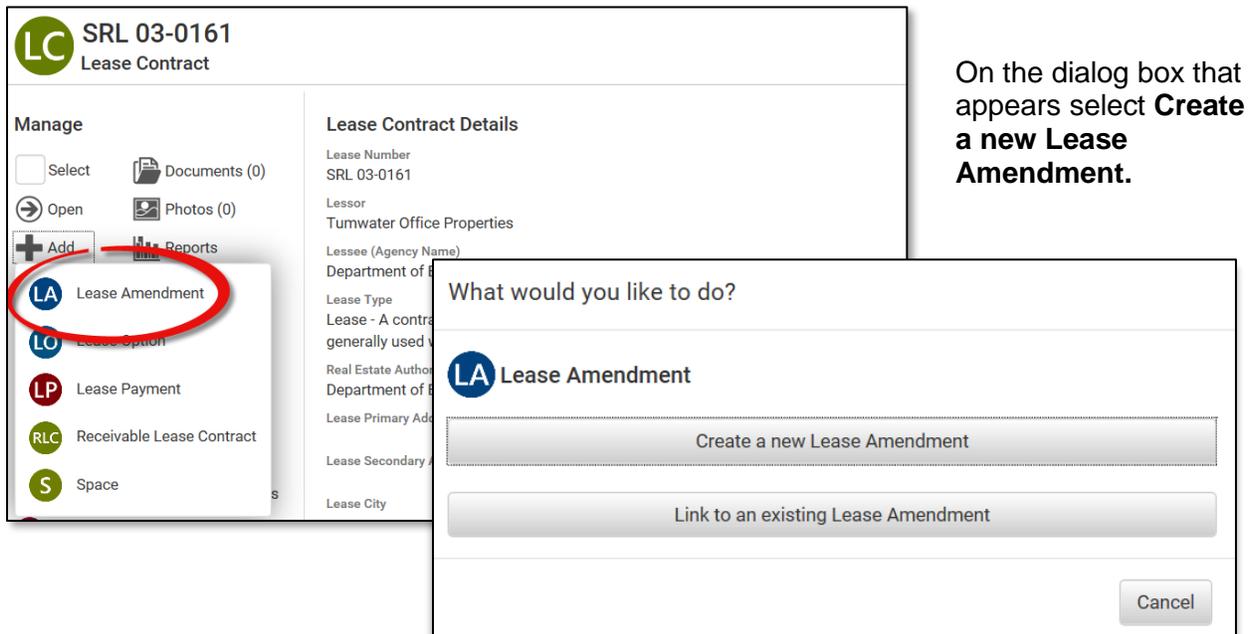
When there is a change in the costs or obligations, ownership change, changes in square footage, or any other lease amendment, you need to complete the **Lease Amendment** table and update the **Lease Contract**.

Open the **Lease Contract** tile 

Open the **data menu** by clicking on 

Click **Add** 

Select **Lease Amendment** 



The screenshot shows the 'Lease Contract' interface for contract 'SRL 03-0161'. On the left, a 'Manage' menu is open, with the 'Add' option selected. The 'Add' sub-menu is visible, and 'Lease Amendment' (LA) is circled in red. On the right, a dialog box titled 'What would you like to do?' is displayed, with 'Lease Amendment' (LA) selected. The dialog box contains two main options: 'Create a new Lease Amendment' and 'Link to an existing Lease Amendment', with a 'Cancel' button at the bottom right. A text box on the right side of the screenshot states: 'On the dialog box that appears select **Create a new Lease Amendment**.'

Enter your data in the **Lease Amendment Properties** section.

The screenshot shows the 'Lease Amendment Properties' form for lease contract 'SRL 03-0161'. The left sidebar contains a navigation menu with tiles for 'Lease Amendments', 'Lease Options', 'Lease Payments', 'Leased Facilities', and 'Spaces'. The main form area includes the following fields: Name, Description, Lease Number (SRL 03-0161), Amendment Number, Amendment Type, Amendment Description, Amendment Effective Date, Amendment Execution Date, and Lease Amendment Status (set to 'Active'). A 'SAVE AND CLOSE' button is located at the bottom right of the form.

Once all fields are populated, click **SAVE AND CLOSE**.

The screenshot shows the main application interface with the 'Lease Amendments' tile selected. A 'New Lease Amendment' tile is visible, displaying the following information: Lease Number: SRL 03-0161, Amendment Number: Amendment-01, and Amendment Type: Square Feet Change. An 'Open' button is present on the right side of this tile. The sidebar navigation menu remains visible on the left.

When you open the **Lease Contract** tile, you will now see a **Lease Amendment** tile entity with the data you just created.

8.7.1 Name

This will be the amendment type and amendment number. Refer to those values to create the name. **Example:** Lease Extension-1

8.7.2 Amendment Number

Amendment number should be used sequentially in the order they were executed and should align with the lease amendment itself. Example: 1, 2, 3.

8.7.3 Amendment Description

The amendment description should provide a brief summary of what has changed in the lease. **Example:** the ownership of the facility changed from Peninsula LLC to Joe and Associates LLC.

8.7.4 Update Associated Lease Tables Based on Lease Amendment Type

The following table list the additional table updates required based on the **Lease Contract Amendment** Amendment Type.

Amendment Type	Lease Tables	Data Fields/Action
Lease Extension	Lease Contract	Lease End Date - Update
	Lease Payment	Payment End Date - Update
Square Feet And Rent Change	Lease Contract	Lease Square Feet - Update
	Space(s)	Square Feet - Update
	Lease Payment (existing)	Lease Payment Status - set to Inactive
	Lease Payment (new)	Add new lease payment
Square Feet Change	Lease Contract	Lease Square Feet - Update
	Space(s)	Square Feet - Update
Rent Rate Change	Lease Payment (existing)	Lease Payment Status - set to Inactive
	Lease Payment (new)	Add new lease payment
Add Option(S)	Lease Option (new)	Add new lease option
Delete Option(S)	Lease Option (existing)	Lease Option Status - set to Inactive
Amend Legal Description	None	None
Revise Parking	Lease Contract	Parking Included in Lease - update if applicable Parking Stall Count - update if applicable
Ownership Change	Lease Contract	Lease Contract - update Lessor name

8.8 Update the Leased Facility Condition Using the Condition Matrix

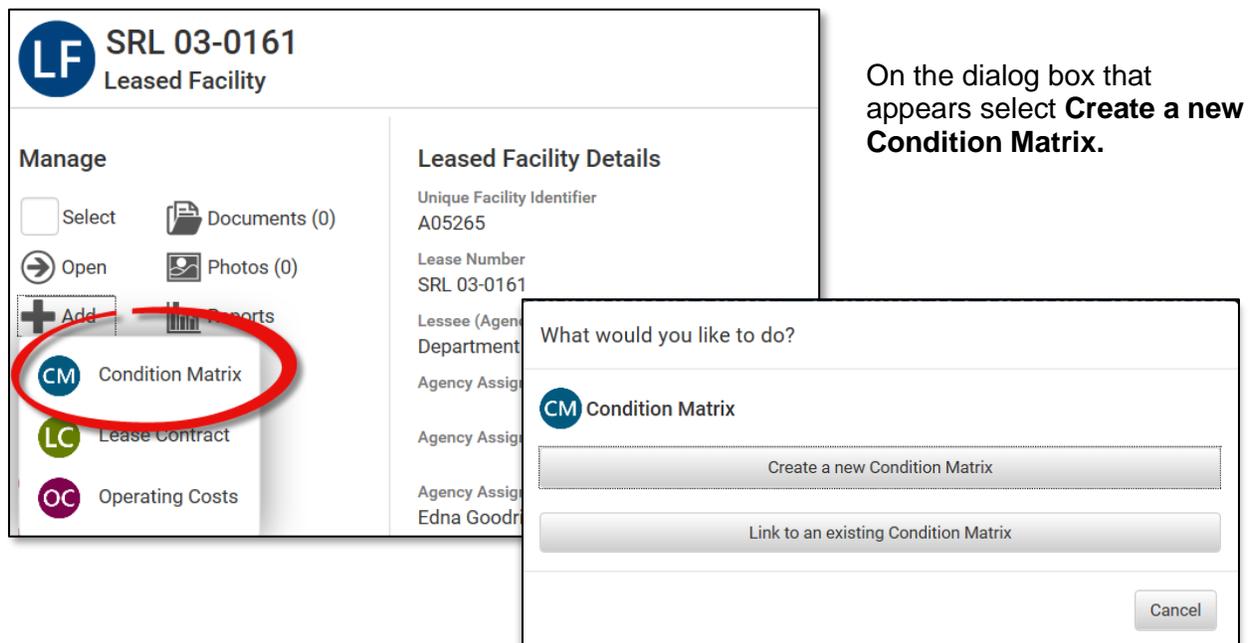
The Condition Matrix is not a required entity. You may use this entity to populate the condition field on the Leased Facility entity.

On the **Leased Facility** tile

Open the **data menu** by clicking on 

Click **Add**  Add

Select **Condition Matrix** 



The screenshot shows the 'Leased Facility' interface for 'SRL 03-0161'. On the left, a 'Manage' sidebar contains an 'Add' button with a plus sign, which has opened a dropdown menu. The 'Condition Matrix' option, marked with a 'CM' icon, is circled in red. To the right, the 'Leased Facility Details' section lists fields like 'Unique Facility Identifier' (A05265) and 'Lease Number' (SRL 03-0161). A dialog box titled 'What would you like to do?' is overlaid on the right, showing two options: 'Create a new Condition Matrix' (highlighted with a grey background) and 'Link to an existing Condition Matrix'. A 'Cancel' button is at the bottom right of the dialog.

On the dialog box that appears select **Create a new Condition Matrix**.

Enter your data in the **Condition Matrix Properties** section.

Note: All condition fields are required

Click **SAVE AND CLOSE**

The system will average all of the condition scores in the **Condition Matrix** table. This number will populate the **Condition Assessment Score** on the **Leased Facility** table as shown below.

8.9 Update a Leased Facility

You can update any Lease Facility related table after you saved it using these simple instructions. The **Edit** function can be accessed from the **Data Menu**.

Navigate to the table you wish to edit.

Click on the three-line menu  on the related tile to open the **Data Menu**.

Click **Edit**.  Edit

The **Table Properties** list will appear. Make desired changes and click **SAVE AND CLOSE**.

8.10 Inactivate (Vacate) a Leased Facility

When you are vacating a leased facility, either due to relocation or building closure, you will need to inactivate the **Leased Facility** and its associated **Lease Contract**. The data remains in the FPMT system, but will no longer appear in facilities reports.

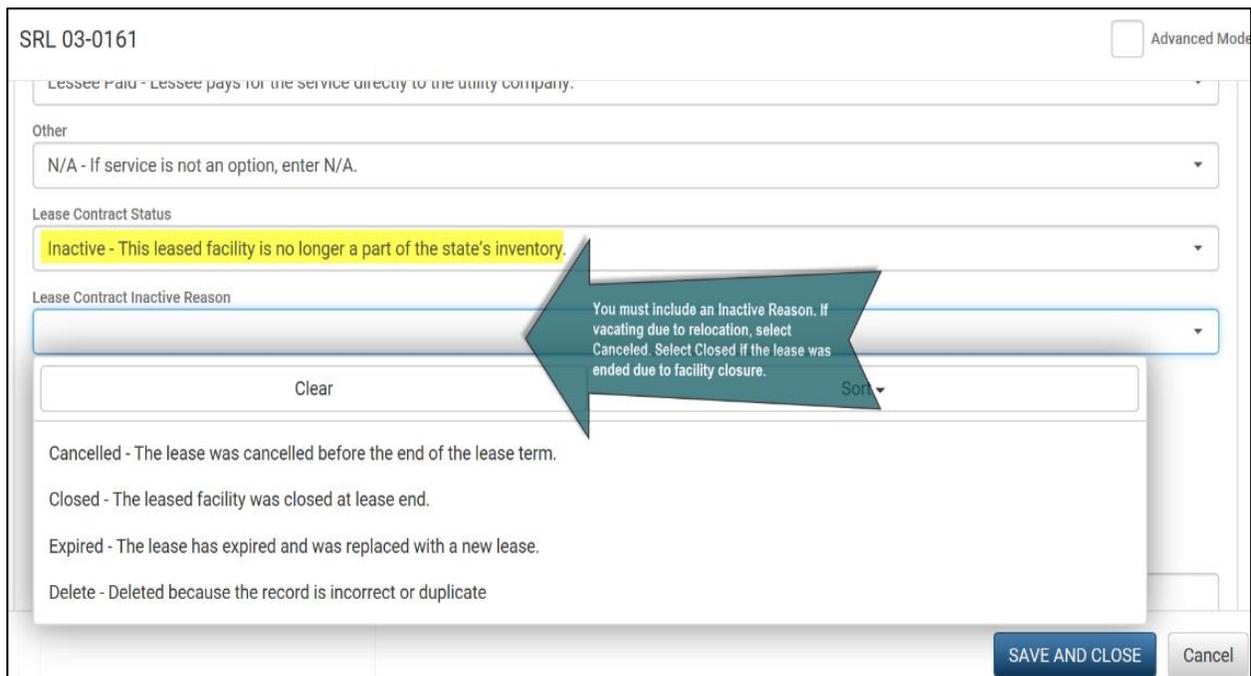
The **Lease Contract** needs to be inactivated first.

Open the **Lease Contract** tile 

Open the **data menu** by clicking on 

Click **Edit**  Edit

On the **Lease Contract Properties** table, change the Lease Contract status to **Inactive**.



SRL 03-0161 Advanced Mode

Lessee Part - Lessee pays for the service directly to the utility company.

Other
N/A - If service is not an option, enter N/A.

Lease Contract Status
Inactive - This leased facility is no longer a part of the state's inventory.

Lease Contract Inactive Reason
You must include an Inactive Reason. If vacating due to relocation, select Cancelled. Select Closed if the lease was ended due to facility closure.

Clear Sort

Cancelled - The lease was cancelled before the end of the lease term.
Closed - The leased facility was closed at lease end.
Expired - The lease has expired and was replaced with a new lease.
Delete - Deleted because the record is incorrect or duplicate

SAVE AND CLOSE Cancel

Select an **Inactive Reason**. If vacating due to relocation, select **Cancelled**.

If vacating due to facility closure, select **Closed**.

Click **SAVE AND CLOSE**

Note: Any associated **Lease Amendments, Lease Options and Lease Payments** will automatically inactivate and will auto-populate with the inactive date.

8.10.1 Inactivate the Leased Facility

After the Lease Contract has been inactivated, the Leased Facility will need to be inactivated as well.

Follow the same procedure as in 8.10 on the **Leased Facility**  entity.

Note: Any associated **Spaces** will automatically inactivate and will auto-populate with the inactive date.

8.10.2 Inactivate the Facility

The **Leased Facility** must be inactivated first. The system will not allow the facility to be inactivated with an active leased facility.

Note: A **Facility** cannot be inactivated in the system if another state agency still occupies space in the **Facility**.

Follow the same procedure as in 7.11 on the **Facility**  entity.

Note: You do not need to include an inactivation reason on the **Facility**.

Click **SAVE AND CLOSE**.

8.11 Renew a Lease Contract on a Leased Facility

To renew a lease contract, you must first add a new lease contract with the updated information.

8.11.1 Add a New Lease Contract

A new Lease Contract should be added to the system after it has been executed. Refer to [8.2 Add a Lease Contract to a Leased Facility](#) to enter in the new lease contract information.

If the new lease has been negotiated and executed, but it is prior to the start date, the lease status may be set to **Pending Renewal**.

The tables associated with the new Lease Contract should also be populated at this time. Follow the links below for instructions on how to populate this data.

[8.3 Add a Lease Payment to a Lease Contract](#)

[8.5 Add a Lease Option to a Lease Contract](#)

8.11.2 Inactivate the Current Lease Contract

Note: If the **Lease Contract** was inserted prior to the lease start date with a status of **Pending Renewal**, first change the **Lease Contract Status** to **Active**. The new Lease Contract Status must be Active before changing the existing Lease Contract Status to Inactive

This will also inactivate all child tables (**Lease Payments, Lease Options, Lease Amendments**).

Open the **Lease Contract** tile



Open the **data menu** by clicking on



Click **Edit**



Edit

On the **Lease Contract Properties** table, change the Lease Contract Status to **Inactive**. In the Lease Contract Inactive Reasons, select **Expired**.

SRL 03-0161 Advanced Mode

Property Tax
Lessee Paid - Lessee pays for the service directly to the utility company.

Water
Lessee Paid - Lessee pays for the service directly to the utility company.

Recycling
Lessee Paid - Lessee pays for the service directly to the utility company.

Other
N/A - If service is not an option, enter N/A.

Lease Contract Status
Inactive - This leased facility is no longer a part of the state's inventory.

Lease Contract Inactive Reason
Expired - The lease has expired and was replaced with a new lease.

Clear Sort

Cancelled - The lease was cancelled before the end of the lease term.

Closed - The leased facility was closed at lease end.

Expired - The lease has expired and was replaced with a new lease.

Delete - Deleted because the record is incorrect or duplicate

SAVE AND CLOSE Cancel

Note: Any associated **Lease Payments, Lease Options and Lease Amendments** will automatically inactivate and will auto-populate with the inactive date.

8.11.3 Unlink Space from Inactivated Lease Contract

Select the **Space** tile



Open the **data menu** by clicking on

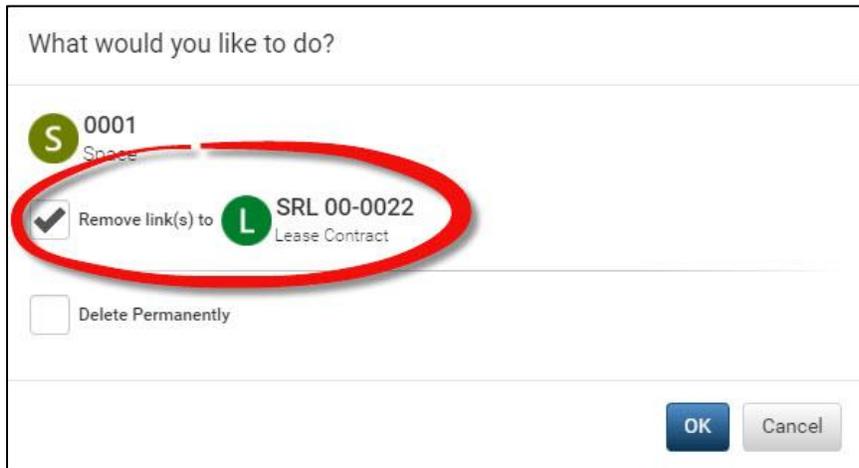


Click **Delete**



Delete

In the dialog box click **Remove link(s) to Lease Contract** and then click **OK**.

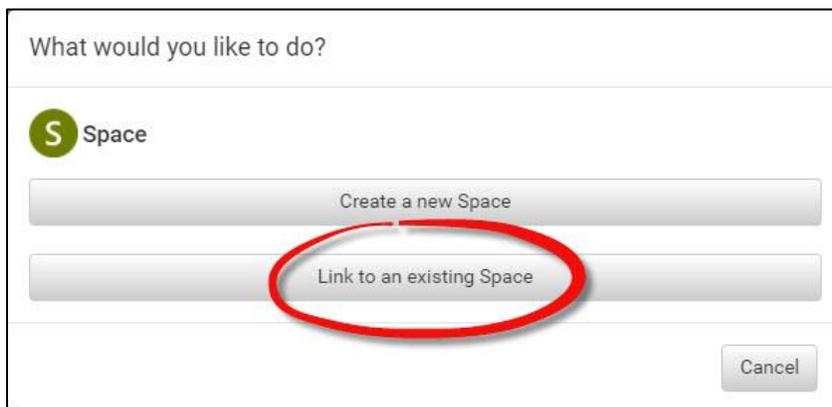


Note: This image shows two delete options. Based on your user role you may only see the Remove link(s) to and not the Delete Permanently option.

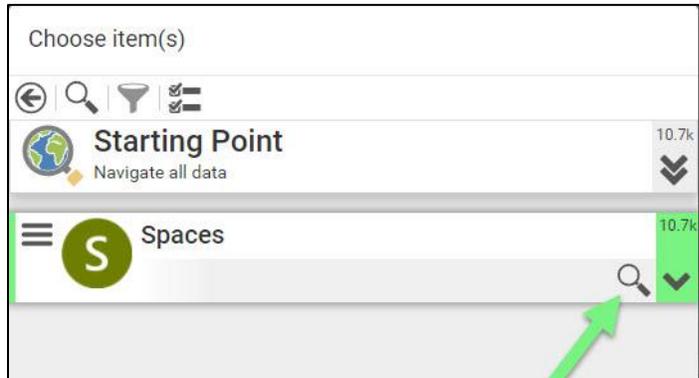
Note: If a **Leased Facility** contains multiple **Spaces**, each space must be selected one at a time and unlinked from the **Lease Contract**.

8.11.4 Link the New Lease Contract to the Existing Space(s)

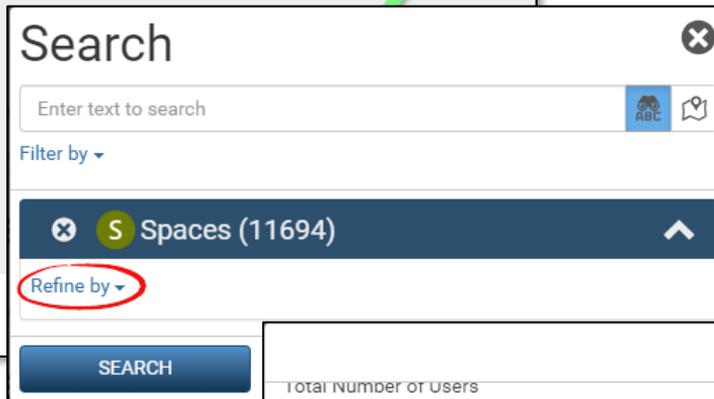
- Open the **Lease Contract** tile 
- Open the **data menu** by clicking on 
- Click **Add**  Add
- Select the **Spaces** tile 



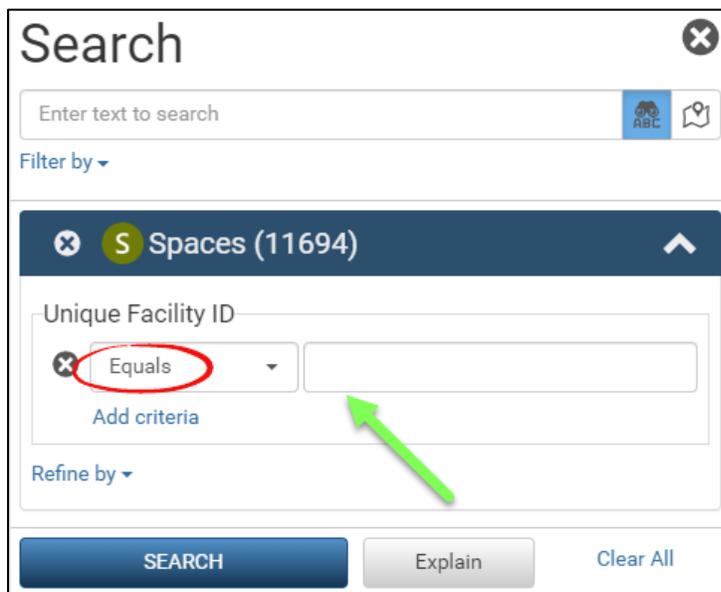
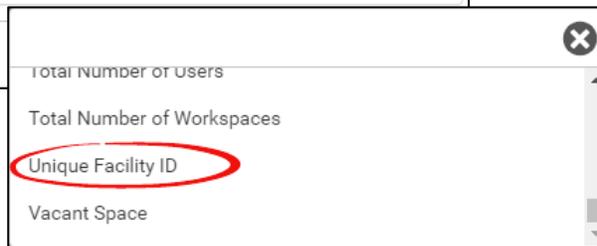
Select **Link to an existing Space**.



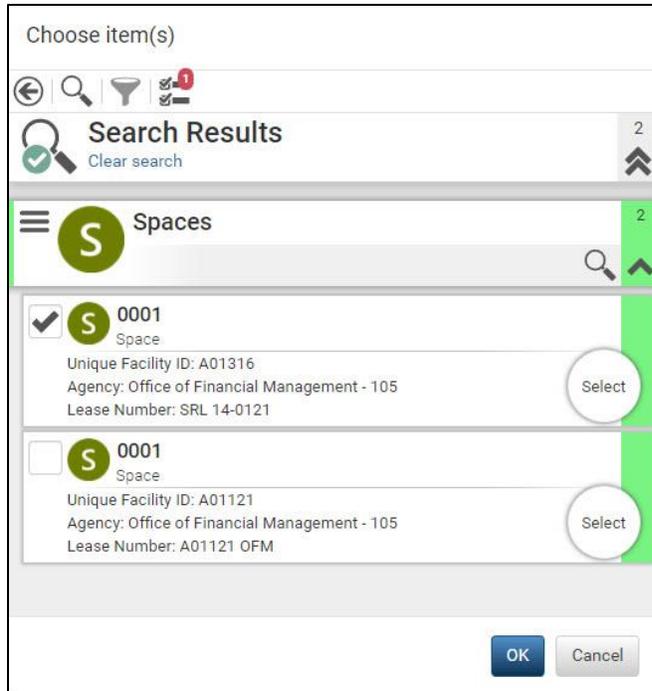
Click on the **magnifier icon** in the right corner of the **Spaces** tile.



In the Search dialog box under **Spaces** click the **Refine by** and select **Unique Facility ID** in the drop down box.



Select the **Equals** in the search criteria box and enter the UFI.



Select the existing **Space(s)**.

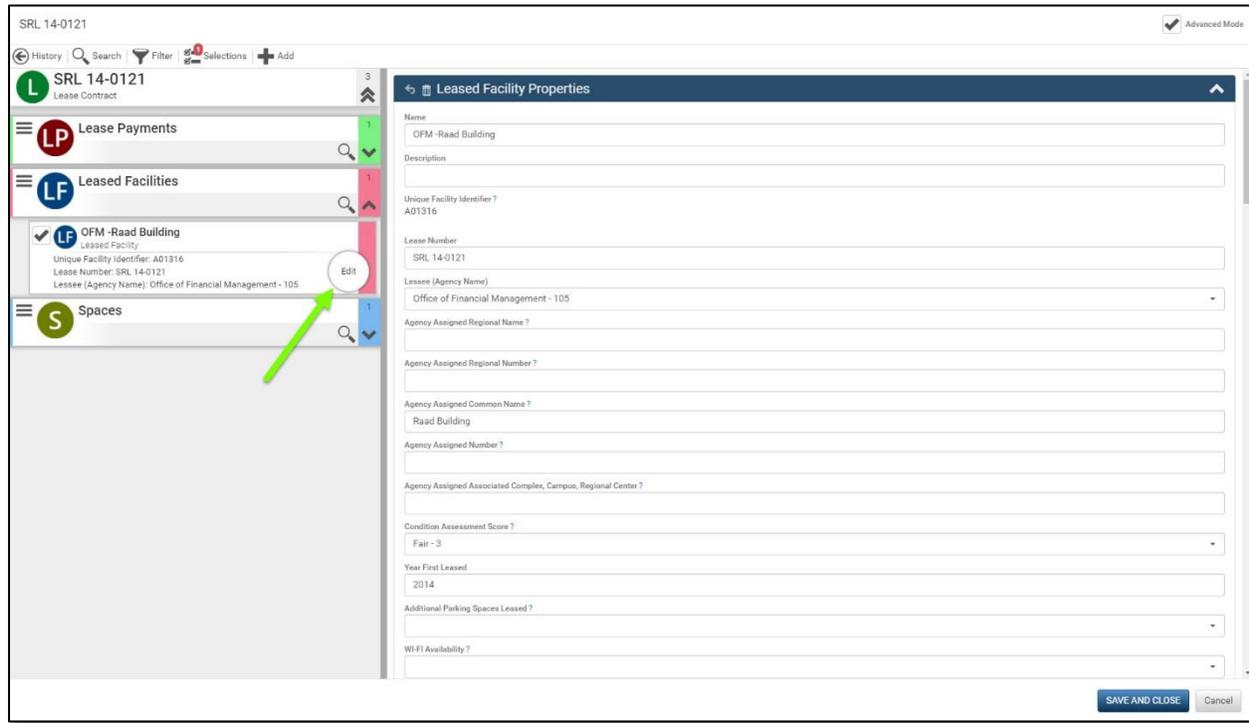
Click **OK**.

When you open the **Lease Contract** tile, you will now see the new **Space** entity with the data you just created.

Note: If a **Leased Facility** contains multiple **Spaces**, each space can be selected and linked to the **Lease Contract** at the same time.

8.11.5 Update the Lease Number on the Leased Facility

While still in **Edit Advanced Mode** click on the **Leased Facilities** tile



Under the **Leased Facilities Properties** header

Delete the old lease number and enter the new lease number.

Click **SAVE AND CLOSE**.

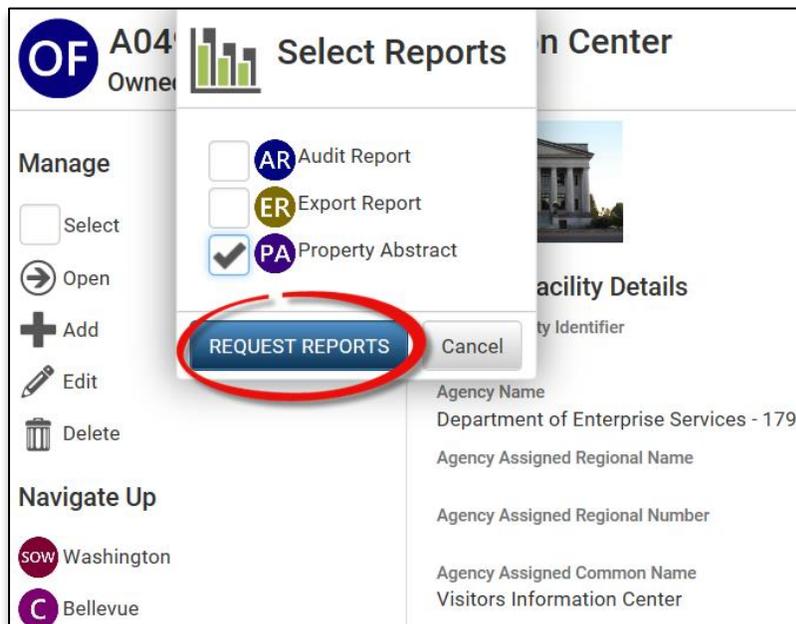
9. Custom Reports

See section [6.10](#) of this User Guide for system-wide reports. The following custom reports have been built for the State of Washington implementation.

9.1 Property Abstract

This report provides summary data for an owned facility. The Property Abstract report can be requested from the Owned Facility tile.

On the Owned Facility data menu click **Reports**.



Select **Property Abstract**.

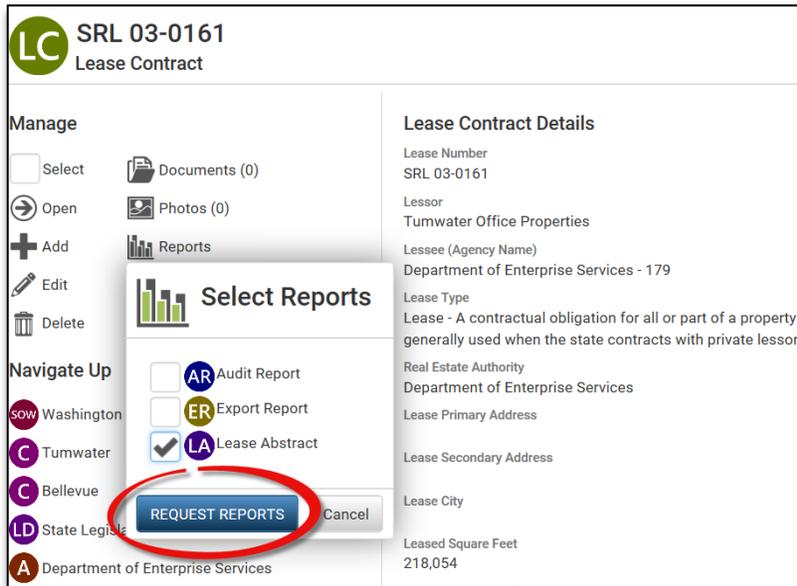
Click **Request Reports**.

The report will display in a preview tab. You can select **Download Excel Report** or **Download PDF** report.

9.2 Lease Abstract

The Lease Abstract report summarizes lease contract data and can be found on the lease contract tile.

On the Lease Contract data menu, click **Reports**.

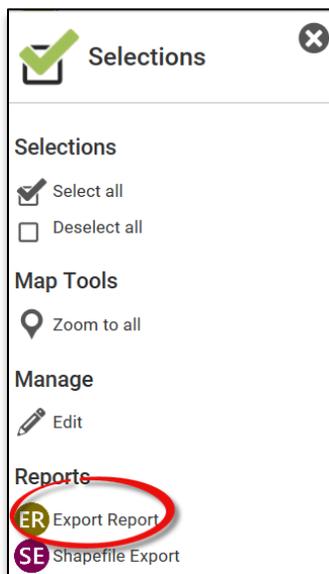


Select **Lease Abstract**.

Click **Request Reports**.

The report will display in a preview tab. You can select **Download Excel Report** or **Download PDF** report.

9.3 Search, Filter and Export for custom data



You can use the Export Report selection under **Select Reports** to export all of the table data to excel. If you would like to produce a more complex report, you can search and filter in the tile menu, select multiple tables by placing a checkmark next to the tile, then export from the selections header. Click the three-line menu on the **Selections** tile.

Click **Export Report**.

A new tab will open with the option to download an Excel file. All of the data from the selected items will be included.

Appendix A: GoRPM Glossary of Terms

Term	Meaning
Ancestor	In data structure, the parent, grandparent, or great grandparent of an entity.
Attribute	A quality, characteristic or feature of an object. Examples of attributes are: shape, size, parts, where it is located, who uses it, when it is used, and function. GoRPM uses nine attribute values to describe an entity: Boolean (binary variable such as yes/no or true/false), date, decimal, integer long, text, unique ID, domain (a set of choices, such as a picklist), badge range, and geometry.
Bug	A fault in a program which causes the program to perform in an unintended manner. Please report any bugs to: fpmtsupport@ofm.wa.gov
Build Date	A version of software used only by the software development company. When the build is finished, it is often marketed under a version number, Incremental and later versions of builds usually have more features and fewer bugs.
CSV file	Comma separated value file which allows data to be saved in a table structured format. GoRPM supports report generation in CSV format. CSV files can be used with any spreadsheet program, such as Microsoft Excel, Open Office Calc, or Google Spreadsheets. They differ from other spreadsheet file types in that you can only have a single sheet in a file, they cannot save cell, column, or row styling, and cannot save formulas.
Descendant	In data structure, an entity proceeding from parent to child.
Entity	A distinct and independent object that may be described by characteristics or attributes. For example, an entity can be a building, a country, or a cost center.
Geocode	Using an address or coordinates to pinpoint a location on a map.
Geographic Information System (GIS)	A system designed to capture, store, manipulate, analyze, manage, and present spatial or geographic data.
Geometry	Shapes with locations that represent real-world objects in the form of a point, line or polygon.

Term	Meaning
Global Positioning System (GPS)	A satellite-based navigation system owned by the United States government. It provides geolocation and time information to a GPS receiver anywhere there is an unobstructed line of sight to four or more GPS satellites. The GPS system operates independently of any telephonic or internet reception, though these technologies can enhance the usefulness of the GPS positioning information. The GPS system provides critical positioning capabilities to military, civil, and commercial users around the world.
Graphical User Interface (GUI)	A type of software display format that enables you to choose commands, start programs, and see lists of files and other options by pointing to pictorial representations (icons) and lists of menu items on the screen. GoRPM uses a GUI.
History	GoRPM remembers “navigation” commands, so that you can repeat them or modify them.
Location	In GoRPM, a location is defined as: a major landmark, a geographical feature (a man-made or naturally created feature of the earth, e.g., a river) or a town, city, county, state, province or country.
Log	A chronological record of relevant details about the execution of tests.
Responsive Web Design	Responsive web design is the practice of building a website suitable to work on every device and every screen size, no matter how large or small, mobile or desktop. It switches between these options on-the-fly.
Shapefile	A shapefile is a simple, non-topological format for storing the geometric location and attribute information of geographic features. Geographic features in a shapefile can be represented by points, lines, or polygons (areas).
Starting Point	A set of data and a map that appears at the entry point upon opening the Data Explorer module. The Starting Point is configured differently for every user, depending on permissions.
Tile	A graphical interface within GoRPM.
XML	Extensible Markup Language. XML is a set of rules for designing text formats that let you structure your data. XML makes it easy for a computer to generate data, read data, and ensure that the data structure is unambiguous. XML avoids common pitfalls in language design: it is extensible, platform-independent, and it supports internationalization and localization.

Appendix B: Definition of a Facility

A facility is defined as the combination of property, location and pertinent lease information. In FIS, a facility is defined as a building or other structure with at least one wall, a roof and a permanent foundation, regardless of occupancy. It is the only type of property accepted in FIS 2016.

Facilities to Be Included

All occupied, vacant or abandoned facilities are to be inventoried. Minor facilities should be included in the inventory if all the following criteria are met:

- Under 24-hour, seven-days-per-week jurisdiction of an agency.
- Permanently attached to a foundation.
- Roofed and have one wall, and;
- Have a square footage value greater than zero.

Facilities to Be Excluded

Structures with any of the following features are excluded from the inventory:

- No permanent foundation.
- No roof.
- No walls.
- Components of the transportation system such as roads, bridges, tunnels and mechanical rooms that are built into bridges and tunnels, and parking areas (land).
- Components of a utility system such as power generating facilities (dams, gas or oil fire electrical power plants), electrical vaults, utility tunnels, water systems (towers, tanks or reservoirs) and communication towers.
- Other similar improvements to real property such as fuel tanks, soil bins, solar panels placed on land and temporary shelters without permanent foundations.

Inventory this: a permanent information booth that is roofed, walled and attached to a foundation.

Do not inventory this: a job shack, which is roofed, walled and temporarily attached to a sidewalk or parking lot with utility service.

Appendix C: Property Class & Space Type Categories

The 10 major series numbers of spaces are intended to provide flexibility in coding space use at the agency level and to provide appropriate comparability in reporting space uses statewide.

The words *space* and *room* could be used interchangeably. For example, wherever space type codes are mentioned, they are called “space use codes.” When space use could be either in a *room* or a *space*, the term *space* is used.

Property Class

The property class is the space type series that the primary space type falls under. An example would be an agency having a primary space as classroom. This space type is in the Education series.

Primary Space Type

Most locations that an agency manages fall readily into one primary space type. FIS defines primary use as more than 60 percent of the space dedicated to one space type. A space that is used as both an Office (310) and a Laboratory (270) and used principally for laboratory testing should be coded as Laboratory. A space that appears or is designed for storage or warehousing, but is used primarily as an office (60 percent or more) should be coded as an office.

If a space has no dominate use, such as 40 percent Office Administrative (311), 40 percent Laboratory (270) and 20 percent Storage/Warehouse (730), it is recommended that agencies evaluate the space use in terms of the human activity element that focuses on primary use rather than percentage of space use by each category.

Secondary and Additional Space Type

Secondary and one Additional Space Type fields are provided as optional fields in FPMT.

Property Class and Space Type Breakdown

Property Class	Space Type #	Space Type
Unclassified (000 Series)	30	Mechanical
	50	Inactive Space
	60	Alteration or Conversion Space
	90	Vacant Unusable Space
Educational (100 Series)	110	Classroom
	120	Training Room
	130	Departmental Classroom
Laboratory (200 Series)	210	Laboratory - General
	210	Classroom Laboratory
	250	Research/Non-Class Laboratory
	255	Research/Non-Class Laboratory Service
	270	Laboratories
Office (300 Series)	310	Office - General
	311	Office - Administrative
	312	Office - Services
	313	Office - Project
	350	Conference Room
Study (400 Series)	410	Study Space
	420	Library
Special Use (500 Series)	502	Hearing Room
	503	Correction

Property Class	Space Type #	Space Type
	504	Military Department/National Guard
	505	Fish Hatchery
	506	Park
	507	Ferry Terminal
	508	Public Restroom
	510	Armory
	520	Athletic or Physical Education
	525	Athletic or Physical Education Service
	530	Media Production
	535	Media Production Service
	540	Clinic
	560	Field Building
	570	Animal Facilities
	575	Animal Quarters Service
	580	Greenhouse
	585	Greenhouse Service
	590	Other (purpose defined when used)
General (600 Series)	610	Assembly
	620	Exhibition
	630	Food Facility
	635	Food Facility Service
	640	Daycare
	650	Lounge

Property Class	Space Type #	Space Type
	660	Merchandising
	670	Recreation
	675	Recreation Service
	680	Meeting Room
Support (700 Series)	710	IT and Communications
	715	Central Computer/Telecom Service
	720	Shop
	725	Central Shop Service
	730	Storage - General
	740	Vehicle Storage Structure
	745	Institute Vehicle Storage Service
	750	Central Service
	760	Hazardous Waste
	770	Hazardous Waste Storage
790	Central Utility Plant	
Health Care (800 Series)	800	Patient Room, Nurse Station, Surgery, Treatment/Examination, Diagnostic and/or Public Waiting Rooms
Residential (900 Series)	900	Sleeping Room, Apartments and/or House

000 Series: Unclassified

Unclassified facilities include those assignable areas that are inactive or unassigned, in the process of being altered, renovated or converted, or in an unfinished state.

030 Inactive Mechanical Spaces

Definition: Available for assignment of mechanical assets but unassigned at the time of inventory.

Limitations: This category does not include space being modified or space that is unusable.

050 Inactive Spaces

Definition: Assets available for assignment but unassigned at the time of inventory.

Limitations: This category does not include space being modified or space that is unusable.

060 Alteration or Conversion Spaces

Definition: Assets temporarily out of use because they are being altered, remodeled or rehabilitated at the time of inventory.

Limitations: This category does not include space that is inactive or space that is unusable.

090 Vacant Unusable Spaces

Definition: Assets unusable at the time of inventory.

Limitations: This category does not include inactive space or space temporarily under conversion.

100 Series: Educational

The 100 category aggregates classroom and training facilities as an institution/agency-wide resource, even though these areas may fall under different levels of organizational control. The term “classroom” includes not only general purpose classrooms, but also lecture halls, recitation rooms, seminar rooms and other spaces used primarily for scheduled non-laboratory instruction. The category Classroom (110) is for degree-granting instruction. The term “training room” includes all the same types of space as classrooms where training programs are conducted.

110 Classroom

Definition: A room or space used primarily for instruction classes and is not tied to a specific subject or discipline by equipment in the room or the configuration of the space.

Description: Includes rooms or spaces generally used for scheduled instruction that require no special restrictive equipment or configuration. These spaces may be called lecture rooms, lecture-demonstration rooms, seminar rooms and general purpose classrooms. A classroom may be equipped with tablet armchairs (fixed to the floor, joined in groups or flexible in arrangement), tables and chairs (as in a seminar room) or similar types of seating. These spaces may contain multimedia or telecommunications equipment. A classroom may be furnished with special equipment for a specific area of study if this equipment does not render the space unsuitable for use by classes in other areas of study.

Limitations: This category does not include Training Rooms (120), Class Laboratories (210), Conference Rooms (350), Auditoria (610) or Meeting Rooms (680). If a space is restricted to a single or closely related group of disciplines by special equipment or its configuration, it may be logically considered as a laboratory (see Code 200 series).

120 Training Room

Definition: A space serving an office and used primarily for staff and public training activities and is not tied to a degree-granting educational program.

Description: Includes rooms or spaces generally used for scheduled training that require no special restrictive equipment or configuration. These spaces may contain multimedia or telecommunications equipment. A training room may be furnished with special equipment specific to the agency work if this equipment does not render the space unsuitable for use by others in the facility.

Limitations: This category does not include Classroom (110), Laboratories (270), Conference Rooms (350), Agency Lounge (650) or Meeting Rooms (680).

130 Departmental Classroom

Definition: A space serving an office and used primarily for staff and public training activities and is not tied to a degree-granting educational program.

Description: Includes rooms or spaces generally used for scheduled training that require no special restrictive equipment or configuration. These spaces may contain multimedia or telecommunications equipment. A training room may be furnished with special equipment specific to the agency work if this equipment does not render the space unsuitable for use by others in the facility.

Limitations: This category does not include Classroom (110), Laboratories (270), Conference Rooms (350), Agency Lounge (650) or Meeting Rooms (680).

200 Series: Laboratory

A laboratory is a facility characterized by special purpose equipment or a specific space configuration that limits the space use. An agency may have very limited laboratory space or the laboratory activities may define the agency.

210 Classroom Laboratory

Definition: A space used primarily for formally or regularly scheduled instruction that require special purpose equipment or a specific space configuration for student participation, experimentation, observation or practice in an academic discipline.

Description: A classroom laboratory is designed for or furnished with equipment to serve the needs of a particular discipline for group instruction in formally or regularly scheduled class.

Limitations: Does not include Classrooms (110). Does not include informally scheduled or unscheduled laboratories (270).

220 Open Laboratory

Definition: A laboratory used primarily for individual or group instructions that is informally scheduled, unscheduled or open.

Description: An open laboratory is designed for or furnished with equipment that serves the needs of a particular discipline or discipline group for individual or group instruction where 1) use of the space is not formally or regularly scheduled, or 2) access is limited to specific groups or students.

Limitations: Laboratories with formally or regularly scheduled classes are classified as a Class Laboratory (210). This category also does not include spaces defined as Research/Non-class Laboratory.

250 Research/Non-Class Laboratory

Definition: A space used for laboratory experimentation, research or training in research methods; professional research and observation; or structured creative activity within a specific program or for sponsored research.

Description: A research/non-class laboratory is designed or equipped for faculty, staff and students for the conduct of research and controlled or structured creative activities.

Limitations: Student practice activity rooms should be classified under Open Laboratory (220).

255 Research/Non-Class Laboratory Service

Definition: A space that directly serves one or more research/non-class laboratories as an extension of the activities in those spaces.

Description: Includes only those spaces that directly serve a research/non-class laboratory.

Limitations: Does not include service spaces that support a Classroom (115), Class Laboratory (210), Open Laboratory (220).

270 Laboratories

Definition: A space used for laboratory experimentation, research or testing.

Description: A laboratory is designed or equipped for staff to conduct research and testing in a controlled or structured environment. Activities may include experimentation, application, observation, composition or research in a structured environment, as directed by the agency.

Limitations: This category does not include educational Class Laboratory (210), Open Laboratory (220) and Research/Non-class Laboratory (250).

300 Series: Office

Office facilities are individual, multi-person or workstation spaces specifically assigned to the agency's administrative, service and support functions.

310 Office - General

Definition: A space housing staff, community volunteers, contractors, state agency partners or community partners working at one or more desks, tables or workstations.

Description: An office is typically assigned to one or more persons as a station or work area. It may be equipped with desks, chairs, tables, bookcases, filing cabinets, computer workstations, microcomputers or other office equipment.

Limitations: Any other spaces, such as shops, printing shops, study rooms, training rooms, laboratories, etc., that incidentally contain desk space for a technician or staff member are classified according to the primary use of the space, instead of as an office. Office areas do not need to have clearly visible physical boundaries. In such cases, logical physical boundaries (phantom walls) may be assigned to calculate square footage.

311 Offices - Administrative

Definition: An office space housing staff primarily dedicated to administrative support for the agency mission.

312 Office - Services

Definition: An office space housing staff primarily dedicated to direct delivery of human services. Examples include driver licenses examination facilities, unemployment benefit offices and public health offices.

313 Office - Project

Definition: An office space housing staff primarily dedicated to a major project in support for the agency mission. Examples include engineers, design teams and planning teams.

350 Conference Room

Definition: A space serving an office complex and used primarily for agency-wide staff meetings and public activities.

Description: A conference space equipped with tables and chairs and typically providing additional parking. Normally it is used by a specific organizational unit or office area, whereas Meeting Rooms (680) are used for general purposes meetings. If a space is used for both conference and meeting space functions, then the space should be classified according to its primary use.

Limitations: Does not include Classrooms (110), Training Rooms (120) and Meeting Rooms (680)

400 Series: Study

Study spaces may contain equipment or materials that aid the study or learning process (e.g., computers, reference material, records and tapes) and that do not restrict the space.

410 Study Space

Definition: A room or area used by individuals to study with the space not being restricted.

Description: Includes study or reading rooms located in libraries, residential facilities, academic study carrels and booth areas. Study stations may be grouped as in a library reading room or individualized as in a carrel. Study spaces are primarily used by staff for learning at their convenience, although access may be restricted by management.

Limitations: This category excludes Laboratories (270) that are restricted to a particular use and Lounges (650) that are intended for relaxation and casual interaction.

420 Stack (Libraries)

Definition: A space used to house arranged collections of educational materials for use as a study resource.

Description: Agency or departmental libraries and are characterized by accessible, arranged and managed collections. Collections can include books, periodicals, journals, monographs, electronic storage media (such as tapes, disks, slides, etc.), musical scores, maps and other educational materials.

Limitations: Does not include general storage areas for materials that serve a particular room or area. Such spaces would take the service code Storage/Warehouse (730).

500 Series: Special Use

This category includes space uses that are sufficiently specialized in their primary activity or function to merit a unique space code. Although many of these special spaces provide service to other areas, their special use or configuration dictates use of an individual category.

502 Hearing Rooms

Definition: A hearing room is a facility characterized by specific space configuration or special purpose equipment that limits the use of the space to hearing activities or closely related activities.

Description: Hearing room activities may include judicial hearings (all levels), formal hearings and informal hearings. They may be equipped with special desks, chairs, tables, bookcases, filing cabinets, computer workstations, microcomputers or other office equipment.

Limitations: Any other spaces such as meeting rooms, study rooms or offices that are occasionally used as hearing rooms are classified according to the primary use of the space rather than as a hearing room. Hearing rooms do not include Classroom (110), Training Room (120), Office (310), Study Space (410), Library (420), Lounge (650) or Meeting Room (680).

503 Corrections

Definition: A building, room or area used by the Department of Corrections for people who are judicially ordered to be kept in custody.

Description: Building, room or area that has a secure boundary maintained by the Department of Corrections.

Limitations: Conventional space use types such as Classrooms (110), Training (120), Laboratories (270), Offices (310), Study Space (410), Library (420), Lounge (650) or Meeting Room (670) are designated as such, even though they are located on Department of Corrections' property.

504 Military Department/National Guard

Definition: A building, room or area used by Washington National Guard and ancillary units for military training and/or instructional activities.

Description: Spaces that are designed or equipped for use in a military training or instructional program, such as indoor drill areas, indoor rifle ranges and specially designed or equipped military science rooms, are included in this category. Ancillary units may include special rifle and drill teams.

Limitations: Conventional space use types such as Classrooms (110), Laboratories (270), Offices (310) and Study Rooms (410) are designated as such even though they are located on military property.

505 Fish Hatchery

Definition: A building, pods or tanks used primarily for raising fish.

Description: Spaces that are obviously designed or equipped for use as fish hatcheries, such as indoor pods or tanks, outdoor pods and specially designed buildings.

Limitations: Conventional space use types such as Classrooms (110), Laboratories (270), Offices (310) and Residential Facilities (900) are designated as such even though they are located at a fish hatchery.

506 Park

Definition: A building, shelter or facility used primarily by the public at a state park.

Description: Spaces that are obviously designed or equipped for public use, such as picnic shelters, comfort stations, woodsheds and specially designed buildings.

Limitations: Conventional space use types such as Office General (310), Shop (720) and Residential Facilities (900) are designated as such even though they are located at a state park.

507 Ferry Terminal

Definition: A building, shelter or facility used primarily by the public for vehicles/passage loading and unloading.

Description: Spaces that are obviously designed or equipped for public use, such as tollbooths, waiting areas, comfort stations and specially designed buildings.

Limitations: Conventional space use types such as Office General (310), Shop (720) and Residential Facilities (900) are designated as such even though they are located at a ferry terminal.

508 Public Restroom

Definition: A building, shelter or facility used primarily by the public.

Description: Spaces that are obviously designed or equipped for public use, such as highways, parks and public venue restrooms.

Limitations: Used primarily by the public even though they are located in facilities with different primary use.

510 Armory

Definition: A room or area used by Reserve Officer Training Corps and ancillary units for military training and/or instructional activities.

Description: Spaces that are obviously designed or equipped for use in a military training or instructional program, such as indoor drill areas, indoor rifle ranges, and specially designed or equipped military science rooms are included in this category.

Limitations: Conventional space use types such as Classrooms (110), Class Laboratories (210), Office (310), and Study Rooms (410) are designated as such, even though they are located in an armory building.

520 Athletic or Physical Education

Definition: A room or area used by students, staff or the public for athletic or physical education activities.

Description: Includes gymnasias, basketball courts, handball courts, squash courts, wrestling rooms, weight or exercise rooms, racquetball courts, indoor swimming pools, indoor stadium fields and field houses.

Limitations: This space use code does not distinguish instructional from intercollegiate, intramural or recreational use of these areas.

525 Athletic or Physical Education Service

Definition: A space that directly serves an athletic or physical education facility as an extension of the activities in that facility.

Description: Includes locker rooms; shower rooms; non-office coaches' rooms; ticket booths; and spaces for dressings, equipment, supply, storage, first aid, skate-sharpening, towels, etc.

Limitations: Does not include public restrooms, which should be classified as non-assignable building service space.

530 Media Production

Definition: A space used for the production or distribution of multimedia materials or signals.

Description: Includes spaces generally called TV studios, radio studios, sound studios, photo studios, video or audio cassette and software production or distribution rooms, and media centers.

Limitations: Does not include spaces that merely store media materials and equipment.

535 Media Production Service

Definition: A space that directly serves a media production or distribution space as an extension of the activities in that facility.

Description: The primary criterion here is that the space should serve a media production or distribution space and not another primary activity space.

Limitations: Those spaces containing media materials, equipment or operations that serve other than a Media Production (530) primary activity space should be assigned the appropriate corresponding service code.

540 Clinic

Definition: A space used for providing diagnosis, consultation, treatment or other services to patients or clients or subjects with a primary purpose of instruction, research or public service.

Description: Included are examination rooms, testing rooms, consultation rooms and holding areas. Such spaces and their related uses are typically associated with educational programs such as psychology, law, speech and hearing.

Limitations: Does not include spaces used for remedial instruction that should be classified as classrooms or laboratories, testing or counseling rooms in non-health or non-discipline-related programs, or Health Care Facilities (800)

560 Field Building

Definition: A barn or similar agricultural structure used for animal shelters or for the handling, storage or protection of farm products, supplies, vehicles or implements.

Description: Includes barns, animal and poultry shelters, sheds, silos, feed units and hay storage.

Limitations: Animal facilities directly supporting research or instructional laboratories should be coded Animal Facilities (570).

570 Animal Facilities

Definition: A space that houses laboratory animals used for research and/or instructional purposes.

Description: Includes animal rooms, cage rooms, stalls, wards, and procedure, operating, recovery, isolation, quarantine and similar spaces for instruction and research.

Limitations: Animal Facilities are typically subject to the rules and regulations of agencies on the care and use of laboratory animals.

575 Animal Quarters Service

Definition: A space that directly serves an animal quarters facility as an extension of the activities in that facility.

Description: Includes feed storage rooms, feed mixing rooms, cage washing rooms, cage storage rooms, casting rooms, instrument rooms, an internal (nonpublic) circulation space.

Limitations: Does not include areas that directly serve facilities used for the treatment of animals.

580 Greenhouse

Definition: A building or space usually composed chiefly of glass, plastic or other light-transmitting material, used for the cultivation or protection of plants or seedlings for research, instruction or campus physical maintenance or improvement purposes.

Description: The primary criterion is the combination of structural design as a greenhouse and the use for cultivation or protection.

Limitations: Greenhouses that are not used for plant cultivation or protection should be classified according to specific use.

585 Greenhouse Service

Definition: A space that directly serves a greenhouse facility as an extension of the activities in that facility.

Description: Includes equipment or materials storage areas and rooms generally called head houses.

Limitations: Excludes storage areas that do not directly serve greenhouses.

590 Other (All Purpose)

Definition: A category of last resort.

Description: Included as a category of last resort to be used only for those spaces or facilities that cannot be described with other codes and definitions.

Limitations: Should have very limited use, if used at all.

600 Series: General Use

General use facilities are characterized by their broader availability to staff and/or the public than are Special Use facilities (500 series), which are typically limited to unique function or special populations. General use facilities comprise support space such as lounge, recreation and general meetings space for the agency and/or public.

610 Assembly

Definition: A space designed and equipped for the assembly of many persons for such events as dramatic, musical, devotional, livestock judging or commencement activities.

Description: Includes theaters, auditoria, concert halls, arenas, chapels and livestock judging pavilions that are used primarily for general presentations (speakers), performances (dramatic, musical, dance) or devotional services.

Limitations: Stage areas used primarily for instruction or practice (dance, music, drama) are typically coded separately as laboratory space. Assembly facilities that are used primarily as instructional lecture halls are classified as Classroom (110) space.

620 Exhibition

Definition: A room or areas used for exhibition of materials, works of art, artifacts, etc., and intended for general use by faculty, students, staff and the public.

Description: Includes both departmental and institution-wide museums, galleries and similar exhibition areas that are used to display materials and items for viewing by the institutional population and the public.

Limitations: Displays that are intended only for instructional purposes and not for general exhibitions (e.g., departmental instructional displays of anthropological, botanical or geological specimens) should be classified as laboratory or laboratory service.

630 Food Facility

Definition: A space used for eating.

Description: Includes dining halls, cafeterias, snack bars, restaurants and similar eating areas, including such areas in residence halls, faculty clubs, etc. This category includes facilities open to students, faculty, staff or the public.

Limitations: Vending areas not provided with seating, counters or tables are classified as Merchandising (660).

635 Food Facility Service

Definition: A space that directly serves a food facility as an extension of the activities in that facility.

Description: Includes kitchens and other preparations areas, cold storage and freezer refrigeration rooms, dishwashing rooms, food servicing areas, cleaning areas, etc.

Limitations: Does not include any type of food preparation space that does not serve a food facility or eating area.

640 Daycare

Definition: A space used to provide day or night, child or elderly adult care as nonmedical service to members of the institutional community.

Description: Includes all primary activity spaces that provide oversight, supervision, developmental training and general personal care for assigned children or adults (e.g., play areas, non-staff eating areas and child training spaces).

Limitations: Does not include any type of food preparation space that does not serve a food facility or eating area (see Food Facility-630).

650 Lounge

Definition: A space used for rest and relaxation that is not restricted to a specific group of people, unit or area.

Description: A lounge facility is typically equipped with furniture, tables and chairs, and may include vending machines. If a space is equipped with more than one or two seats for a seating area and intended for use by people visiting or passing through a building or area, it is coded as a Lounge (650). Such a space may have vending machines even though the primary use of the space is rest, relaxation or informal socializing.

Limitations: A lounge facility is distinguished from a Conference Room (350) and a Meeting Room (680), both of which are intended for formal meetings, by its more informal function of rest, relaxation or casual interaction and its public availability.

660 Merchandising

Definition: A space used to sell products or services.

Description: Includes product and service sales areas such as bookstores, student supply stores, barber or beauty shops, post offices, campus food stores, walk-away vending machine spaces and central ticket outlets servicing multiple facilities or activities.

Limitations: Does not include dining rooms, restaurants, snack bars, similar Food Facilities (630).

670 Recreation

Definition: A space used by students, staff or the public for recreational purposes.

Description: Includes exercise and general fitness rooms, billiards rooms, game and arcade rooms, table tennis rooms, chess rooms, card playing rooms, hobby rooms, TV rooms, reading (nonstudy) rooms and music listening rooms that are used for recreation and amusement and not for instructional purposes.

Limitations: Does not include gymnasias, basketball courts, weight rooms, racquetball courts, handball courts, squash courts, wrestling rooms, indoor swimming pools, indoor ice rinks, indoor tracks, indoor stadium fields, indoor golf and other areas primarily used for physical education and intramural or intercollegiate athletic activities.

675 Recreation Service

Definition: A space that directly serves a recreation facility as an extension of the activities in that facility.

Description: Includes storage rooms, closets, equipment issue rooms, cashiers desks, first aid and other support areas that directly serve a Recreation (670) facility.

Limitations: Does not include kitchens, snack bars or other Food Facilities (630) and Food Facility Service (635) areas.

680 Meeting Room

Definition: A room that is used by the agency or the public for a variety of meetings.

Description: The key concept here is availability. Conference Rooms (350) are often confused with Meeting Rooms because they are both used for meetings. However, conference spaces have visitor parking components for a building or complex. Although Meeting Rooms may be

assigned to a specific organizational unit, a meeting space is more available and open to staff groups.

Limitations: Spaces serving a headquarter complex and used primarily for agency-wide staff meetings are classified as Conference Room (350). Training rooms used primarily for scheduled class, training and seminars are classified as Training Rooms (120).

700 Series: Support

Support facilities provide centralized space for various auxiliary support systems and help keep all agency programs and activities operational. While not as directly accessible to agency and community members as General Use facilities (600 series), these areas provide a continuous, indirect support system to administration, staff and the public. Support facilities are centralized in that they typically serve an area ranging from a building to an entire region. Included are centralized areas for computer-based data processing and telecommunications, shop services, general storage, and supply and vehicle storage.

710 IT and Communications

Definition: A space used as a data or telecommunications center with applications that are broad enough to serve the overall administrative needs of a central group of users, department or agency.

Description: A central computer or telecommunications room or a secured, compartmented information facility may be one of a group of spaces that constitute a center for delivering data processing or telecommunications services to various levels of user groups.

Limitations: Does not include Office (310) space assigned to programmers, analysts, engineers, data entry personnel and other technical staff even though these spaces usually contain an access terminal. Also does not include Laboratory (270), Study Room (410) or offices with data processing equipment used as office tools. Personal computer, terminal work spaces, printer rooms and data closet that serve an office area should be coded Office General (310).

715 Central Computer/Telecom Service

Definition: A space that directly serves a central computer or telecommunications facility as an extension of the activities in that facility.

Description: Includes paper and forms storage, off-line tape and disk storage, separate control or console rooms or booths, tool and parts rooms, bursting and decollating rooms, areas used to store only inactive support equipment (e.g., multiplexers, modems, spoolers, etc.) and separate areas used for delivering tapes or picking up printouts.

Limitations: Does not include Office (310) areas for personnel (technicians, engineers, analysts, programmers) assigned to the central computer facility, primary equipment (computer,

I/O) rooms (see IT and Communications-710) and office areas containing data processing or networking office service equipment or materials (see Office-310, Office Service-315).

720 Shop

Definition: A space used for the manufacture, repair or maintenance of products and equipment.

Description: Includes carpenter, plumbing, HVAC, electrical and painting shops, and similar physical plant maintenance facilities. This category also includes centralized shops for construction, repair and maintenance of equipment and devices. Special purpose shops supporting multiple spaces for scientific instruction and research are included in this category.

Limitations: Does not include architectural and engineering drafting rooms serving the facilities management operation, which are classified as Office (310). This category also does not include areas used for the repair and maintenance of agency-owned vehicles, which are Vehicle Storage (740).

725 Shop Service

Definition: A space that directly serves a shop facility as an extension of the activities in that facility.

Description: Includes tool storage rooms, materials storage rooms and similar equipment or material supply or storage rooms.

Limitations: Does not include service areas for Class Laboratories (210) or Research/Non-class Laboratories (250). Also does not include vehicular repair facilities (e.g., garages) classified as Vehicle Storage Service (745).

730 Storage – General

Definition: A space or building that is used to store equipment or materials and that serves multiple space use categories, organizational units or buildings.

Description: The concept of storage is central to applying this code correctly. The majority of storage spaces are service rooms that directly support a primary activity of the agency; for example, a furniture storage room serving several Offices (310). Central storage areas include areas commonly called warehouses, surplus storage, central storage and inactive storage. A storage space used to store bulk janitorial supplies would be included in this category.

Limitations: Does not include a storage space directly serving a primary space such as Office (310). Also, this category does not include custodial supply closets or other similar, non-assignable small storage spaces.

740 Vehicle Storage Structure

Definition: A structure that is used to house or store vehicles.

Description: Includes structures and buildings generally called parking decks, garages, boathouses and airplane hangars. The definition of “vehicle” is broadly interpreted here to include forklifts, moving equipment, lawn equipment and other powered transport devices or equipment, as well as automobiles and trucks.

Limitations: This category does not include surface parking lots.

745 Institute Vehicle Storage Service

Definition: A space that directly serves a vehicle storage facility as an extension of the activities in that facility.

Description: Includes any areas or rooms directly serving a vehicle storage facility, such as storage rooms and areas used for maintenance and repair of automotive equipment, boats, airplanes and other vehicles as defined in Vehicle Storage (740).

Limitations: Does not include shops defined in Shop (720) (e.g., carpenter, plumbing, electrical, painting, etc.).

750 Central Service

Definition: A room or area that is used for the processing, preparation or delivery of agency-wide support service.

Description: The central service area includes centralized stores and laundries that typically serve the occupants or activities of more than one building. Also includes central facilities for printing and duplicating services, central mail facilities, central shipping and receiving areas, and central environmental testing or monitoring facilities if they serve the occupants and activities of more than one building.

Limitations: Does not include those spaces providing the above-listed functions if they support other primary activity spaces in the same building. For example, a storage area in an office should be coded as Office (310). Facilities used for the manufacture, repair, or maintenance of products or equipment should be coded Shop (720), Storage-General (730) and Vehicle Storage (740).

760 Hazardous Materials Storage

Definition: A centralized facility used for the storage of materials planned for future use or distribution that are considered hazardous by the physical, chemical, biological or radioactive nature of the materials.

Description: Hazardous materials include those materials that are flammable, chemically aggressive (e.g., acids or bases), chemically unstable, biologically toxic or radioactive.

Limitations: Does not include centralized storage of hazardous waste materials (see Hazardous Waste Storage -770); small satellite storage areas located around the institution; satellite accumulation areas location near or adjacent to instructional, research or process facilities; or dedicated unit storage).

770 Hazardous Waste Storage

Definition: A centralized storage facility used for the treatment and/or disposal of hazardous or toxic waste materials as defined, classified and controlled under government environmental regulations.

Description: This includes facilities specifically devoted to the storage, treatment and/or disposal of toxic or hazardous waste.

Limitations: Does not include centralized storage of hazardous materials (see Hazardous Materials Storage-760); small area satellite storage areas located around the institution; satellite accumulation areas located near or adjacent to instructional, research or process facilities; or dedicated unit storage.

790 Central Utility Plant

Definition: A facility that primarily houses central utility production and/or distribution to more than one facility at a complex, campus or regional center. These include such facilities as steam plants, co-generation facilities and electrical distribution facilities.

Description: Spaces that are obviously designed or equipped for distribution of energy.

Limitations: Conventional space use types such as Office General (310), Conference Rooms (350) or Shop (720) are designated as such even though they are located in a Central Utility Plant.

800 Series: Health Care

At this time there is no delineation of categories for health care facilities. The 800 series includes all patient care areas that are located in separately organized and budgeted health care facilities: infirmaries, hospitals and stand-alone clinics that are run by agencies.

900 Series: Residential

At this time there is no delineation of categories for residential facilities. Residential facilities include housing for staff, patients, inmates and visitors. Note: Not all space in residential

facilities is categorized using the 900 series. Conventional primary activity and service categories such as Training Rooms (120), Offices (310), Study Rooms (410), Lounges (650) and Recreation (670) are not included in the 900 series.

Appendix D: Facility Square Footage Measurement

In an inventory system, it is important to have a common measurement unit to make effective comparisons. Unfortunately, there are no common measurement units for owned and leased buildings at this time. FIS uses several measurement types: gross, assignable, non-assignable and rentable square feet.

Owned facilities will typically be measured in gross square feet but can also be measured in rentable or assignable square feet.

Leased facilities will typically be measured in rentable square feet but can also be measured in gross or assignable square feet.

- | | |
|-------------------------|---|
| Gross Square Feet: | The total constructed square footage of a building is the sum of all spaces on all floors of a building measured to the exterior enclosing walls. |
| Rentable Square Feet: | The tenant's prorated portion of the floor, excluding major vertical penetrations. Typically, this is the square footage report on the lease. |
| Assignable Square Feet: | A measurement used to describe the office, storage, special and internal circulation areas assigned to an occupant. |

Appendix E: Condition Matrix

As owned or leased facilities age, they increasingly require more attention to maintain. To help planners organize their efforts, the FIS condition matrix was developed to provide a facility conditions assessment tool for agencies. A detailed facility condition assessment consists of measuring all major facility asset components and translating the inspection data into a meaningful condition metrics. These are then used to support the asset management decision making. The FIS condition matrix is not a substitute for this detailed building condition assessment process.

The FIS condition matrix provides nine categories to evaluating each facility:

- Facility Support and Response Time – facility staff support and response time to request.
- Satisfaction – agency satisfaction with facility.
- Preventive vs. Corrective Maintenance – to what degree is maintenance addressed in a preventive vs. corrective manner.
- Maintenance – response to preventive, reactive and emergency maintenance.
- Interior – aesthetic assessment of interior finishes.
- Exterior – aesthetic assessment of exterior finishes.
- Lighting – aesthetic assessment of lighting.
- Service Efficiency – service and maintenance call evaluation.
- Building System Reliability – evaluation of system breakdowns and repairs.

Agencies need to rank their facility conditions on a 1 to 5 scale. The condition matrix table in FPMT is optional. The evaluator is asked to rank each category in the **Condition Matrix Properties** form. The system will average the scores and provide a condition assessment score in the facility entity.

Level	1	2	3	4	5
Description	Superior	Adequate	Fair	Limited	Emergent Services Only
Facility Support and Response Time	Able to respond to virtually any type of service; immediate response.	Response to most service needs, including limited non-maintenance activities, is typically in a week or less.	Services available only by reducing maintenance, with response times of one month or less.	Services available only by reducing maintenance, with response times of one year or less.	Services not available unless directed from top administration; none provided except in emergencies.
Satisfaction	Proud of facilities; have a high level of trust for the facilities organization.	Satisfied with facilities-related services, usually complimentary of facilities staff.	Accustomed to basic level of facilities care. Generally able to perform mission duties. Lack of pride in physical environment.	Generally critical of cost, responsiveness and quality of facilities services.	Consistent customer ridicule, mistrust of facilities services.
Preventive vs. Corrective Maintenance	100%	75–99%	50–74%	25–49%	<25%
Maintenance	All recommended preventive maintenance (PMs) are scheduled and performed on time. Reactive maintenance (spot re-lamping and adjusting door closers) is minimized to the unavoidable or economical. Emergencies (storms or power outages) are very infrequent and handled efficiently.	A well-developed PM program: most required PMs are done at a frequency slightly less than per defined schedule. Appreciable reactive maintenance required due to systems wearing out prematurely and high number of lamps burning out. Occasional emergencies caused by pump failures, cooling system failures, etc.	Reactive maintenance predominates due to systems failing to perform, especially during harsh seasonal peaks. An effort still made at PM: priority to schedule as time and manpower permit. The high number of emergencies (pump failures, heating and cooling system failures) causes reports to upper administration.	Worn-out systems require manpower to be scheduled to react to systems that are performing poorly or not at all. Significant time spent procuring parts and services due to the high number of emergencies with weekly reporting. PM work possible consists of simple tasks and is done inconsistently (filter changing, greasing and fan belt replacement, etc.).	No PM performed due to more pressing problems. Reactive maintenance is a necessity due to worn-out systems (doors won't lock, fans lock up, HVAC systems fail). Good emergency response because of skills gained in reacting to frequent system failures (no status reporting, upper administration is tired of reading the reports).

Level	1	2	3	4	5
Description	Superior	Adequate	Fair	Limited	Emergent Services Only
Interior	Like-new finishes.	Clean/crisp finishes.	Average finishes.	Dingy finishes.	Neglected finishes.
Lighting	Bright and clean, attractive lighting.	Bright and clean, attractive lighting.	Small percentage of lights out, generally well lit and clean.	Numerous lights out, some missing diffusers, secondary areas dark.	Dark, lots of shadows, bulbs and diffusers missing, cave-like, damaged, hardware is missing.
Service Efficiency	Maintenance activities appear highly organized and focused. Typically, equipment and building components are fully functional and in excellent operating condition. Service and maintenance calls are responded to immediately. Buildings and equipment are routinely and regularly upgraded, keeping them current with modern standards and usage.	Maintenance activities appear organized with direction. Equipment and building components are usually functional and in operating condition. Service and maintenance calls are responded to in a timely manner. Buildings and equipment are regularly upgraded, keeping them current with modern standards and usage.	Maintenance activities appear to be somewhat organized, but remain people dependent. Equipment and building components are mostly functional, but suffer occasional breakdowns. Service and maintenance call response times are variable and sporadic, without apparent cause. Buildings and equipment are periodically upgraded to current standards and use, but not enough to control the effects of normal usage and deterioration.	Maintenance activities appear somewhat chaotic and are people dependent. Equipment and building components are frequently broken and inoperative. Service and maintenance calls are typically not responded to in a timely manner. Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present use needs.	Maintenance activities appear chaotic and without direction. Equipment and building components are routinely broken and inoperative. Service and maintenance calls are never responded to in a timely manner. Normal usage and deterioration continues unabated, making buildings and equipment inadequate to meet present use needs.

Level	1	2	3	4	5
Description	Superior	Adequate	Fair	Limited	Emergent Services Only
Building Systems Reliability	Breakdown maintenance is rare and limited to vandalism and abuse repairs.	Building components occasionally breakdown.	Building and systems components periodically or often fail.	Many systems unreliable. Constant need for repair. Backlog of repair needs exceeds resources.	Many systems unreliable. Constant need for repair. Backlog of repair needs exceeds resources.