



FEBRUARY & MARCH 2020

FPMT: INTRO TO FPMT HANDS-ON TRAINING

OFM Facilities Planning Team

Kelli Dowling, Enterprise Application Trainer

OFM

OFFICE OF FINANCIAL MANAGEMENT

WELCOME!

Introduction of Team

Please Silence Your Cell Phones

Sign In Sheets and Desktop Resources

Amenities

Bathrooms

Building Access and Emergency Exits

New Training Material Available Now!

Course Survey



LEARNING OBJECTIVES

Understand what the Facilities Portfolio Management Tool is used for.

Know where to launch the new FPMT wizards and which business processes they are available for.

Able to make content changes in FPMT.

Able to follow steps for data validation and system reports.

Know the Facilities Inventory and Six-Year Facilities Plan data requirements and due dates.

Know where to find on-demand resources.



AGENDA

- ✓ Introduction
- FPMT Overview
- Scenarios
- New Wizards
 - Overview
 - Demos and Hands On Activities
- Annual Inventory & Biennial Six-Year Plan
 - Overview
 - Scenario Demos
- On-demand resources
- Closure



FPMT OVERVIEW

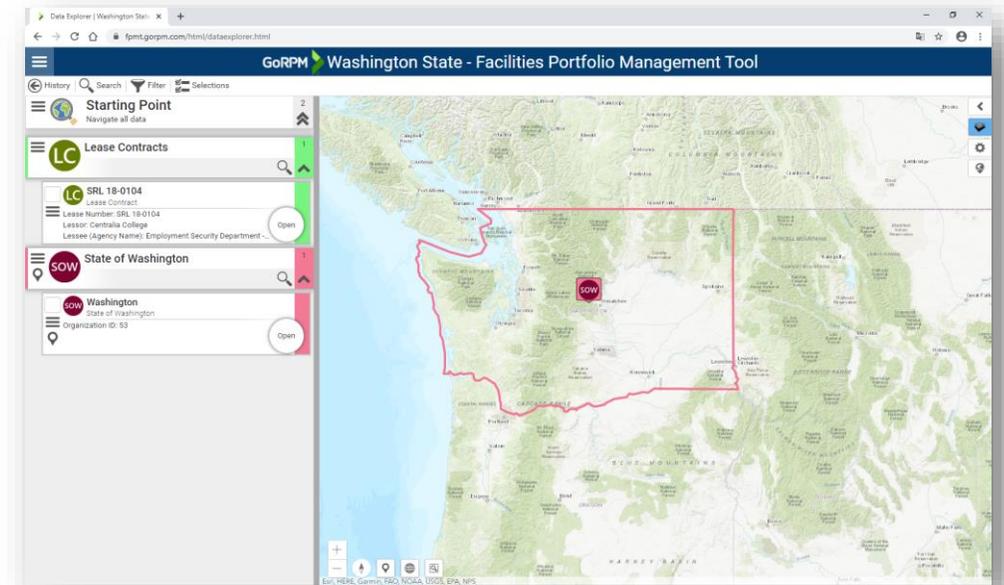


OVERVIEW

The Facilities Portfolio Management Tool (FPMT) is the system of record for the inventory of state-owned and leased facilities.

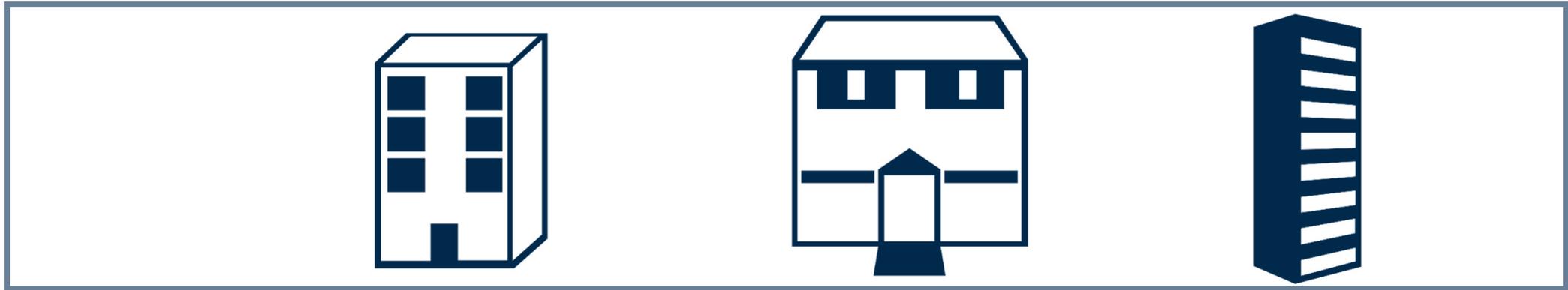
It allows OFM to capture, manage, use and report relevant facility inventory data collected from **over 75 state agencies**.

The data stored in the system is used to inform the state's **Six-Year Facilities Plan**, **capital and operating budget decisions**, **comprehensive emergency management planning** and other analyses related to state facilities.



FACILITY DEFINITION

A facility is any building or structure with at least one wall, a roof, and a permanent foundation, regardless of occupancy.



Facilities are not roads, bridges, parking areas, utility systems, or other such improvements on real property.



OWNERSHIP TYPES



The contract may be in the form of: traditional lease, resource sharing agreement (RSA), memorandum of understanding (MOU), an interagency agreement (IA) or a federal license.

Facilities can be owned, leased or other.

Owned



Legally owned by a Washington State agency

Leased



Obligated to a state agency through a contract

Other



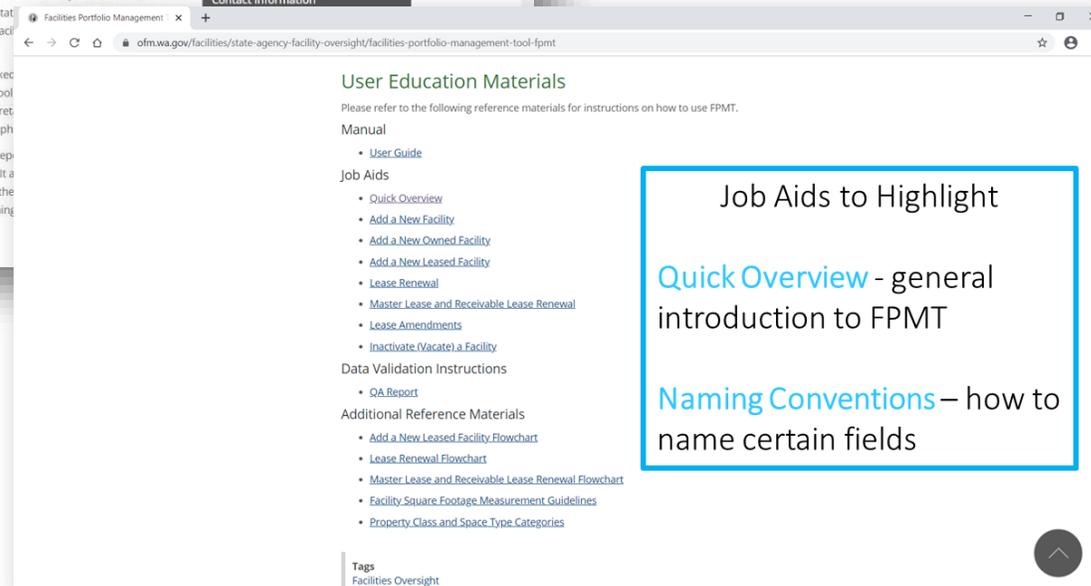
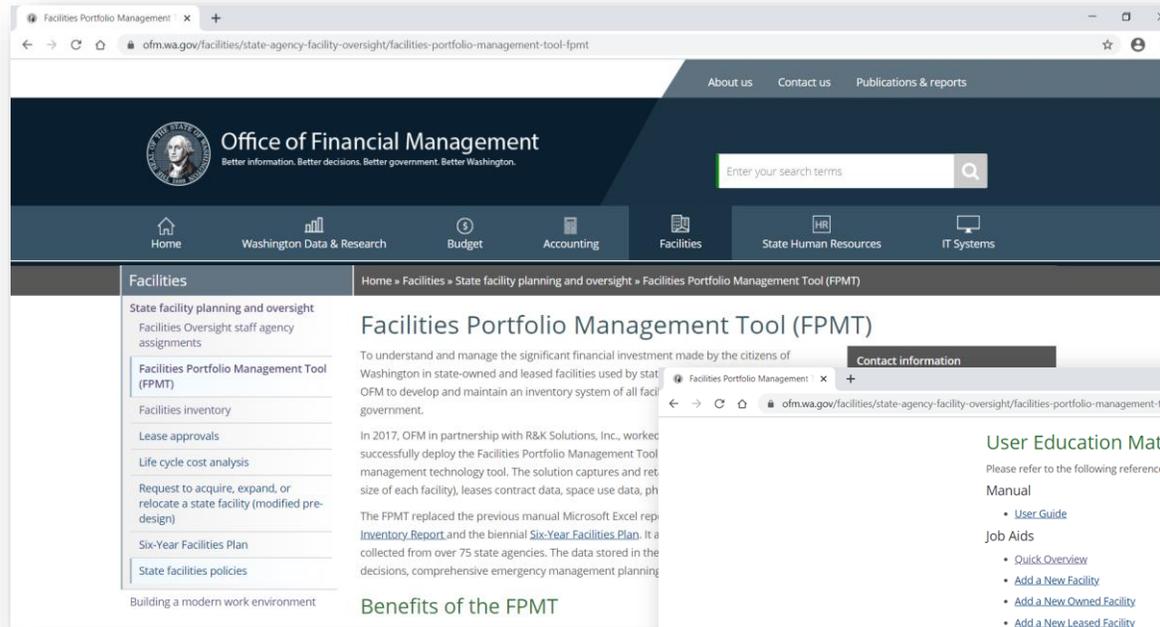
A facility that houses state employees but is not obligated to the agency

FPMT RESOURCES

Documentation can be found on OFM's FPMT webpage under "Facilities."

<https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-portfolio-management-tool-fpmt>

New Account Setup Instructions | Task-specific Job Aids | Data validation instructions



Job Aids to Highlight

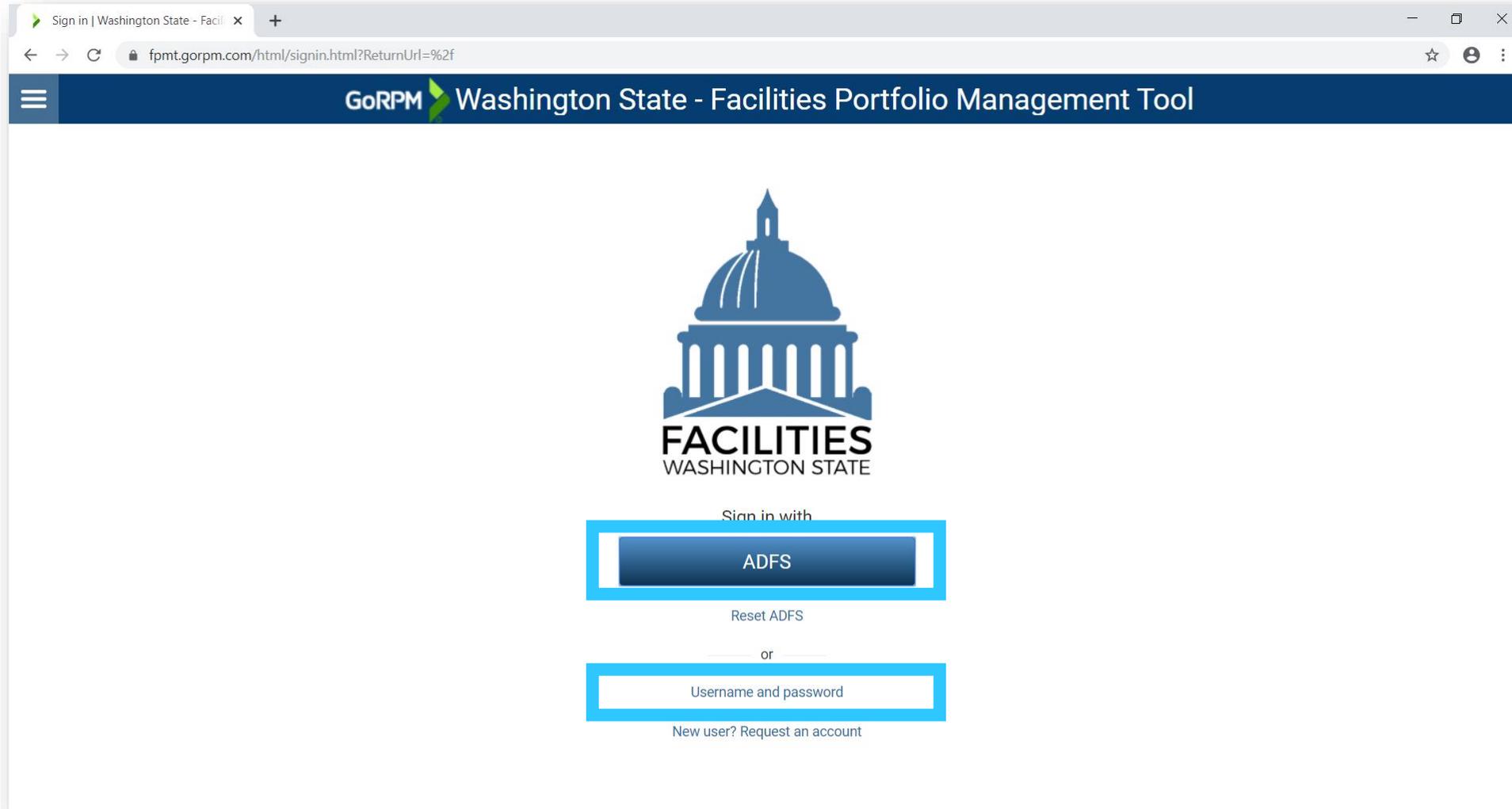
[Quick Overview](#) - general introduction to FPMT

[Naming Conventions](#) – how to name certain fields



STEP ONE: LOG IN AND NAVIGATE TO APPROPRIATE MODULE

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



STEP ONE: LOG IN AND NAVIGATE TO APPROPRIATE MODULE

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

The screenshot shows a web browser window with the URL fpmt.gorpm.com/html/home.html. The page features a dark blue header with the GoRPM logo and the text "Washington State - Facilities Portfolio Management Tool". Below the header is a large background image of a modern building interior. Three white cards are overlaid on the image, each with an icon and text:

- Data Explorer**: Begin here to search, analyze, and drill down into your data. Includes a globe icon and an "Open" button.
- Reference Documents**: Access reference documents. Includes a folder icon and an "Open" button.
- My User Account**: Manage your user profile and security settings. Includes a person icon and an "Open" button.

A blue-bordered box at the bottom of the screenshot contains the text: "The contents you see on this screen may vary based on your permissions level".

STEP ONE: LOG IN AND NAVIGATE TO APPROPRIATE MODULE

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

Washington State - Facilities Portfolio Management Tool

Reference Documents is where documentation to provide assistance for use of the tool was historically provided.

Moving forward, please use the OFM website.

Reference Documents
Access reference documents
Open

My User Account
Manage your user profile and security settings
Open

The contents you see on this screen may vary based on your permissions level

STEP ONE: LOG IN AND NAVIGATE TO APPROPRIATE MODULE

EXPIRATION OF PASSWORDS:

Passwords expire per OCIO
guidelines.

To reset an expired password, refer
to the job aid.

****If you have single sign-on, you will not need
to renew this password****

Washington State - Facilities Portfolio Management Tool

and drill down into your data



Reference Documents
Access reference documents

Open



My User Account

Manage your user profile and security settings

Open

My User Account is the module
to manage your user profile and
security settings.

Change your password
**set a reminder to regularly update
this!**

Change security settings
Edit information

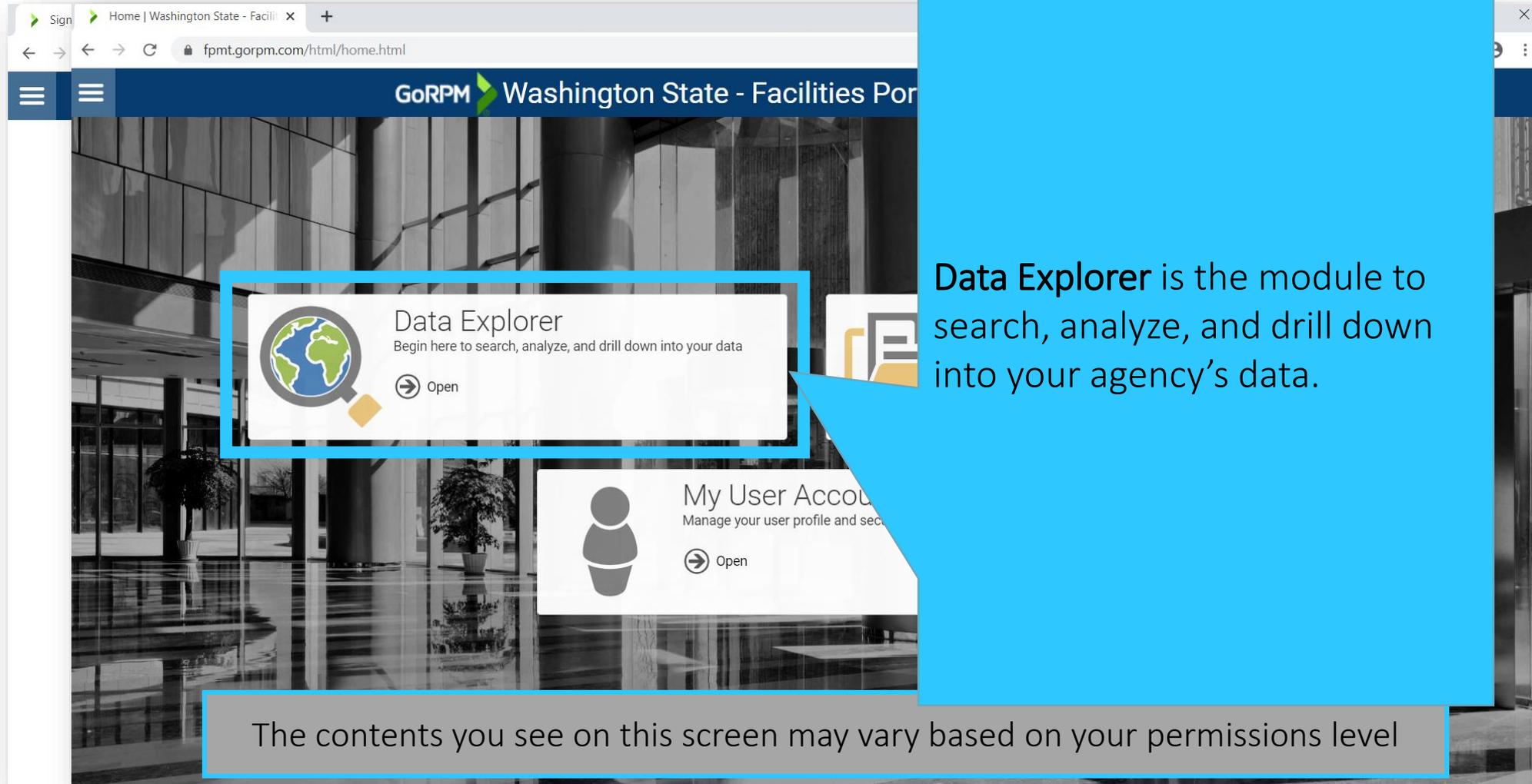
Lists your Roles/Permission

Read-Only access is default – for
elevated access, contact
heretohelp@ofm.wa.gov

The contents you see on this screen may vary based on your permissions

STEP ONE: LOG IN AND NAVIGATE TO APPROPRIATE MODULE

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



GoRPM Washington State - Facilities Por

Data Explorer
Begin here to search, analyze, and drill down into your data
Open

My User Account
Manage your user profile and sec
Open

Data Explorer is the module to search, analyze, and drill down into your agency's data.

The contents you see on this screen may vary based on your permissions level

DATA EXPLORER – LIVE DEMO

Data Explorer | Washington State x +

fpm.gorpm.com/html/dataexplorer.html

GoRPM Washington State - Facilities Portfolio Management Tool

History Search Filter Selections

Starting Point
Navigate all data

State of Washington

Washington
State of Washington
Organization ID: 53
Open

Esri, HERE, Garmin, FAO, NOAA, USGS, EPA, NPS

SCENARIOS



SCENARIO #1: LEASE RENEWAL



Wizard: Renew

The lease for your agency's regional headquarters has been approved for renewal. The start date for the new lease contract was the beginning of this month



SCENARIO #2: CREATE A NEW LEASED FACILITY



Wizard: Create Leased Facility

The Legislature provided funding for a new program in your agency, which required hiring new staff and securing a leased facility that met specific location requirements. The start date for the lease contract was the beginning of this month.



SCENARIO #3: CREATE A NEW RECEIVABLE LEASE



Wizard: Create Receivable Lease

Another agency has reached out to your agency about the possibility of leasing space in your regional headquarters building. They have been tasked with a new grant-funded project and will need to locate a few staff in an area where they do not currently have space. Your agency leadership agrees to lease space to these staff at least through the end of your current lease.



NEW USER INTERFACE

“WIZARDS”



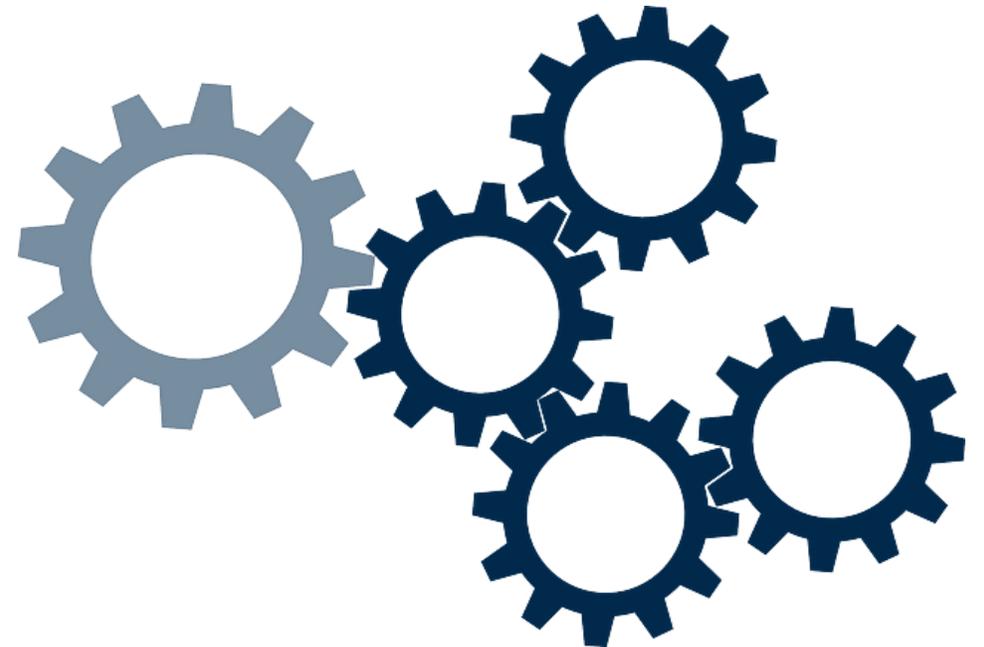
OVERVIEW: WHAT ARE WIZARDS USED FOR

Wizards reduce manual activity by guiding users through each step of the process and automating steps like linking tables and changing table statuses. This simplifies the overall experience and supports reduction of data errors.

This is the first iteration; there will be changes as improvement needs are identified. New wizards may be added.

Facilities Planning went through an exercise to review agency data and correct table link errors and missing data so that the wizards would work appropriately.

Wizards go live in production on February 28.



OVERVIEW: WIZARDS – THE RELEVANT BUSINESS PROCESSES

Lease Renewal 	Master Lease Renewal 	Receivable Lease Renewal 	Create a New Owned Facility 	Create a New Leased Facility 	Create a New Receivable Lease 	Deactivation Wizard 
<p>Renew on or after new lease start date</p> <p>Launch wizard from the expired lease contract</p>	<p>Must renew receivable leases at same time or they will be automatically deactivated</p> <p>Launch wizard from expired lease contract</p>	<p>Used to renew a receivable lease on owned facilities or when the receivable lease expires before the master lease</p> <p>Launch wizard from expired receivable lease contract</p>	<p>Will create a new facility as part of this process (geocoding is required)</p> <p>Launch wizard from the agency tile</p>	<p>Have the option of creating a new facility or linking to an existing one</p> <p>Should search for an existing facility first</p> <p>Launch wizard from the agency tile</p>	<p>Need to edit the existing space before adding a new receivable lease space (done inside wizard)</p> <p>Launch wizard from lease contract or owned facility</p>	<p>Launch wizard from owned, leased or receivable leased facility</p> <p>Wizard will deactivate all associated tables</p> <p>Agencies cannot deactivate a facility that has other agency tenants</p>

WIZARD– TIPS

-  Wizards open in a new window; refresh original FPMT window to see changes
-  Complete the update in one sitting – you will lose data if you time-out
-  Navigate through the wizard by clicking “next” or “previous”
-  Business rules and validation checks alert users to missing data and common data entry errors

WIZARDS: WHAT YOU CANNOT USE THEM FOR

Editing existing records:

- Fixing data entry errors
- Adding/updating condition assessment score
- Updating workstation/occupancy data when not renewing a lease

Lease amendments

Attaching documents

Operating costs (available in creation wizards only)

Debt Service (available in owned creation wizard only)



DEMOS AND HANDS ON ACTIVITIES



SCENARIO #1: LEASE RENEWAL- DEMO



Wizard: Renew

The lease for your agency's regional headquarters has been approved for renewal. The start date for the new lease contract was the beginning of this month



SCENARIO #1: LEASE RENEWAL - DEMO



SCENARIO #1: LEASE RENEWAL - HANDS-ON ACTIVITY



Wizard: Renew

OBJECTIVE:

Become familiar with basic functionality and starting the wizard for renewing a lease contract.

The lease for your agency's regional headquarters has been approved for renewal. The start date for the new lease contract was the beginning of this month

SCENARIO #1: HANDS ON ACTIVITY INSTRUCTIONS

- Information you need: Copy of the Lease Contract, Lease number of expired contract, maybe UFI of facility
- Use expired lease number to search for the contract, launch renewal wizard from expired lease contract
- Check the clock – can you finish this activity? If the phone rings, let it go to voicemail!
- Note the wizard opens in a new window.
- Double check pre-populated information.
- 5 fields must be populated: Name (lease contract number), Lease Number Field (same as the name, but cannot be reused from a different contract), Lease Executed Date, Lease Start Date, Lease End Date. → Click Next
- Add Lease Payment – populate required fields, click Save Changes
- If no other changes are needed, click Next until you reach the Data Review section – review your data
- Save & Close

Lease
Renewal



SCENARIO #1: HANDS ON ACTIVITY INSTRUCTIONS

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- Use expired lease number to search for the contract, launch renewal wizard from expired lease contract
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Lease
Renewal

SCENARIO #1: LEASE RENEWAL – ADVANTAGES



Wizard: Renew

Guides users through the process

Automatically links and unlinks tables as needed

Automatically updates to inactive the status of the old lease, lease payment(s), lease option(s)/amendment(s)

Automatically updates the lease number in leased facility table



SCENARIO #1: RENEWING A LEASE CONTRACT – TIPS



Wizard: Renew

Data due on or after the new lease start date

Minimum entry requirements: completed lease contract and one lease payment

Addition of new space requires the facility Unique Facility Identifier (UFI)

If the square footage in the lease contract has changed, you will need to update the existing space table as part of the wizard process



SCENARIO #2: CREATE A NEW LEASED FACILITY - DEMO



Wizard: Create Leased Facility

The Legislature provided funding for a new program in your agency, which required hiring new staff and securing a leased facility that met specific location requirements. The start date for the lease contract was the beginning of this month.



SCENARIO #2: CREATE A NEW LEASED FACILITY - DEMO



SCENARIO #2: CREATE A NEW LEASED FACILITY - HANDS-ON ACTIVITY



Wizard: Create Leased Facility

OBJECTIVE:

Become familiar with basic functionality and starting the wizard for adding a leased facility.

The Legislature provided funding for a new program in your agency, which required hiring new staff and securing a leased facility that met specific location requirements. The start date for the lease contract was the beginning of this month.

SCENARIO #2: HANDS ON ACTIVITY INSTRUCTIONS

- Search FPMT for the facility to make sure it's not already part of the inventory
- Navigate to your agency tile and launch the creation wizard
- Add New Leased Facility – populate fields, click Next
- Select an existing facility or Create a new facility – if the facility already exists, you will link to an existing record; if it doesn't exist, you will create a new facility; click Next
- Add New Space – populate fields, click Save Changes,
- Click Next, click Save Changes (to bypass Operating Costs and Condition Matrix)
- Lease Contract – populate required fields, click Next
- Add Lease Payment – populate required fields, click Save Changes
- Click Next twice (to bypass Lease Options and Amendments)
- Review your data
- Click Save and Close

Create A New
Leased
Facility



SCENARIO #2: HANDS ON ACTIVITY INSTRUCTIONS

- Search FPMT for the facility to make sure it's not already part of the inventory
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- Click Next twice (to bypass Lease Options and Amendments)
- Review your data
- Click Save and Close

Create A New
Leased
Facility

SCENARIO #2: CREATE A NEW LEASED FACILITY – TIPS



Wizard: Create Leased Facility

Data due on or after the lease start date

Minimum entry requirements: leased facility, facility, lease space, lease contract, and at least one lease payment

Users must geocode new facilities (add a point on the map)



SCENARIO #3: CREATE A NEW RECEIVABLE LEASE - DEMO



Wizard: Create Receivable Lease

Another agency has reached out to your agency about the possibility of leasing space in your regional headquarters building. They have been tasked with a new grant-funded project and will need to locate a few staff in an area where they do not currently have space. Your agency leadership agrees to lease space to these staff at least through the end of your current lease.



SCENARIO #3: CREATE A NEW RECEIVABLE LEASE - DEMO



SCENARIO #3: HANDS-ON ACTIVITY



OBJECTIVE:

Wizard: Create Receivable Lease

Become familiar with basic functionality and starting the wizard for adding a receivable lease.

Another agency has reached out to your agency about the possibility of leasing space in your regional headquarters building. They have been tasked with a new grant-funded project and will need to locate a few staff in an area where they do not currently have space. Your agency leadership agrees to lease space to these staff at least through the end of your current lease.

SCENARIO #3: HANDS ON ACTIVITY INSTRUCTIONS

- Navigate to the lease contract tile and launch the receivable lease creation wizard
- Add Receivable Leased Facility – populate fields, click Next
- Add Receivable Lease Contract – populate fields, click Next
- Add Receivable Lease Payment – populate fields, click Save Changes, click Next
- Update your existing space – click details, subtract the receivable lease square footage from the existing space square footage, click Save Changes
- Click Add New Space – populate fields, click Save Changes
- Click Next twice to bypass Lease Options and Amendments
- Review your data
- Click Save and Close

Create A New
Receivable
Lease



SCENARIO #3: HANDS ON ACTIVITY INSTRUCTIONS

- Navigate to the lease contract tile and launch the receivable lease creation wizard
- Add Receivable Leased Facility – populate fields, click Next
- Add Receivable Lease Contract – populate fields, click Next
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- Review your data
- Click Save and Close

Create A New
Receivable
Lease

SCENARIO #3: CREATE A NEW RECEIVABLE LEASE – TIPS



Wizard: Create Receivable Lease

Update the existing lease contract or owned facility space before adding the receivable lease space (done inside the wizard)

Data due on or after the receivable lease start date

Minimum entry requirements: receivable leased facility, receivable lease contract, receivable lease space and at least one receivable lease payment



OVERVIEW: WIZARDS – THE RELEVANT BUSINESS PROCESSES

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ANNUAL INVENTORY AND SIX-YEAR FACILITIES PLAN

ANNUAL INVENTORY AND BIENNIAL SIX-YEAR FACILITY PLAN

Annual Inventory (required by RCW 43.82.150)

- The inventory, stored in FPMT, serves as Washington's official record of state-owned and leased facilities.
- Data informs long-term facilities planning, capital and operating budgets, emergency management planning and other analyses.
- The statute requires agencies to report their inventories as of June 30 each year
- OFM submits an inventory report to the Legislature by October 1 of each year.



ANNUAL INVENTORY AND BIENNIAL SIX-YEAR FACILITIES PLAN

Six-Year Facilities Plan (required by RCW 43.82.055)

- Biennially, OFM works with state agencies to determine the long-term facility needs of state government to ensure cost-effective planning and the efficient use of space.
- The plan gives agencies the opportunity to articulate anticipated needs and desired actions, ranging from relocation and expansion projects to downsizing and colocation with another agency.
- OFM submits the plan to the Legislature on January 1 of odd-numbered years



This is a two-step process: baseline data collected in FPMT and the Agency Desired Plan (outside of FPMT). This training will focus on the baseline data.

ANNUAL INVENTORY AND BIENNIAL SIX-YEAR FACILITIES PLAN

As part of an ongoing process improvement effort, OFM has aligned the inventory and Six-Year Plan baseline data collection processes to address confusion and duplication of effort. This is the first year that both processes will happen concurrently.

All data and associated FPMT reports
are due to OFM by **June 23***

*Brand new facilities must be added by June 1

Agency leadership will be notified if reports have not been received by this due date.

WHAT IS NEW OR DIFFERENT ?

- ❖ **Aligned data collection** for inventory and Six-Year Plan
- ❖ New facilities are due **June 1**; all other data and associated reports are due **June 23**
- ❖ **Condition Assessment Score is required for all facilities** – the FPMT condition matrix is an optional way to populate this score
- ❖ Facilities that are in scope for the Six-Year Plan have the following data requirements, which **are in addition to inventory data**:
 - Operating costs (owned and leased)
 - Debt service (owned)
 - Workstation and occupancy data (owned and leased)
 - New and/or updated receivable lease information (owned and leased)
 - Supporting lease and receivable lease documentation must be attached in FPMT

SIX-YEAR FACILITIES PLAN – IN-SCOPE FACILITIES

The Six-Year Facilities Plan includes a subset of the overall state facilities inventory.

The following space types for both owned and leased facilities will be included in the 2021-27 Six-Year Facilities Plan:

Space Type	Space Type Number
Training Room	120
Departmental Classroom	130
Laboratory – General	210
Laboratories	270
Office – General	310
Office – Administrative	311
Office – Services	312
Office – Project	313
Conference Room	350

Support spaces (property class 700 series) are out of scope for the 2021-27 Six-Year Facilities Plan.

SIX-YEAR FACILITIES PLAN – OUT-OF-SCOPE FACILITIES

The following facility types are out of scope for the Six-Year Plan:

- Support Spaces
- All Higher Education
- The School for the Blind and the School for the Deaf
- Washington State Parks and park facilities
- Washington State Commodity Commissions
- Owned Residential Police and Fire Training Facilities (WSP and CJTC)
- Owned Military Facilities
- Owned DNR Trust Assets
- Owned Historical Societies
- Fish Hatcheries and Wildlife Areas
- Radio Communications Sites
- Facilities that are part of the transportation system such as weigh stations, ferry terminals, toll booths, tunnel/bridge workspaces, etc.
- Residential Detention Facilities (adult and youth)
- Residential Mental Health Facilities and Inpatient Evaluation Treatment Centers
- Public Restrooms



**This information can be found in the instructions that are online at <https://ofm.wa.gov/facilities/state-agency-facility-oversight/six-year-facilities-plan>

AGENCIES WILL RECEIVE ONE SET OF INSTRUCTIONS

Annual
Inventory &
Six-Year Plan

Annual
Inventory

Specialized
Instructions

DEMOS



SCENARIOS

- Lease Amendment
- Occupancy and Workstation Data
- Operating Costs



SCENARIO #4: DATA COLLECTION – LEASE AMENDMENT - DEMO

The owner of the leased property has changed. The lessor on the lease contract needs to be updated.



SCENARIO #4: SUMMARY & TIPS

To properly enter a lease amendment in FPMT, you must add a lease amendment table AND make associated edits in other tables.

For the ownership change example, we added an amendment table and updated the owner in the lease contract table.

There are other types of amendments you may need to enter. Refer to the lease amendments job aid, available on the Facilities Planning FPMT webpage, for instructions.



SCENARIO #5: DATA COLLECTION – OCCUPANCY & WORKSTATION DATA - DEMO

Agencies must report occupancy and workstation data for all in-scope owned and leased facilities as part of the Six-Year Facilities Plan baseline data collection process.



SCENARIO #5: SUMMARY & TIPS

To add or update workstation and occupancy data, edit the space table

Workspace and occupancy definitions are available as a job aid on the FPMT webpage. You can also find these definitions by clicking the question mark next to each data field in FPMT.

You can edit an existing space table in the lease renewal wizards

You can add workstation and occupancy data as part of the new leased facility and new owned facility creation wizards



SCENARIO #6: DATA COLLECTION – OPERATING COSTS – DEMO

Agencies must report operating costs for all in-scope owned and leased facilities as part of the Six-Year Facilities Plan baseline data collection process.



SCENARIO #6: SUMMARY & TIPS

- Baseline data for the 2021-27 Six-Year Facilities Plan should include an estimate for your **FY 2020 annual operating expenses**.
- You can use your FY 2019 annual operating costs as an estimate, or if you do not have actuals, you can use OFM's estimated operating expenses (available as part of the Six-Year Plan instructions)
- Operating costs can be added as part of the new leased or new owned facility creation wizard process.
- For existing owned and leased facilities, how you report operating costs depends on whether previous operating costs were reported as part of the last Six-Year plan.
- If there are no previous operating costs, add a new operating costs table from the owned or leased facility tile.
- If operating costs were reported for the last Six-Year plan, overwrite the data in the existing operating costs table.



DATA VALIDATION AND RUNNING REPORTS

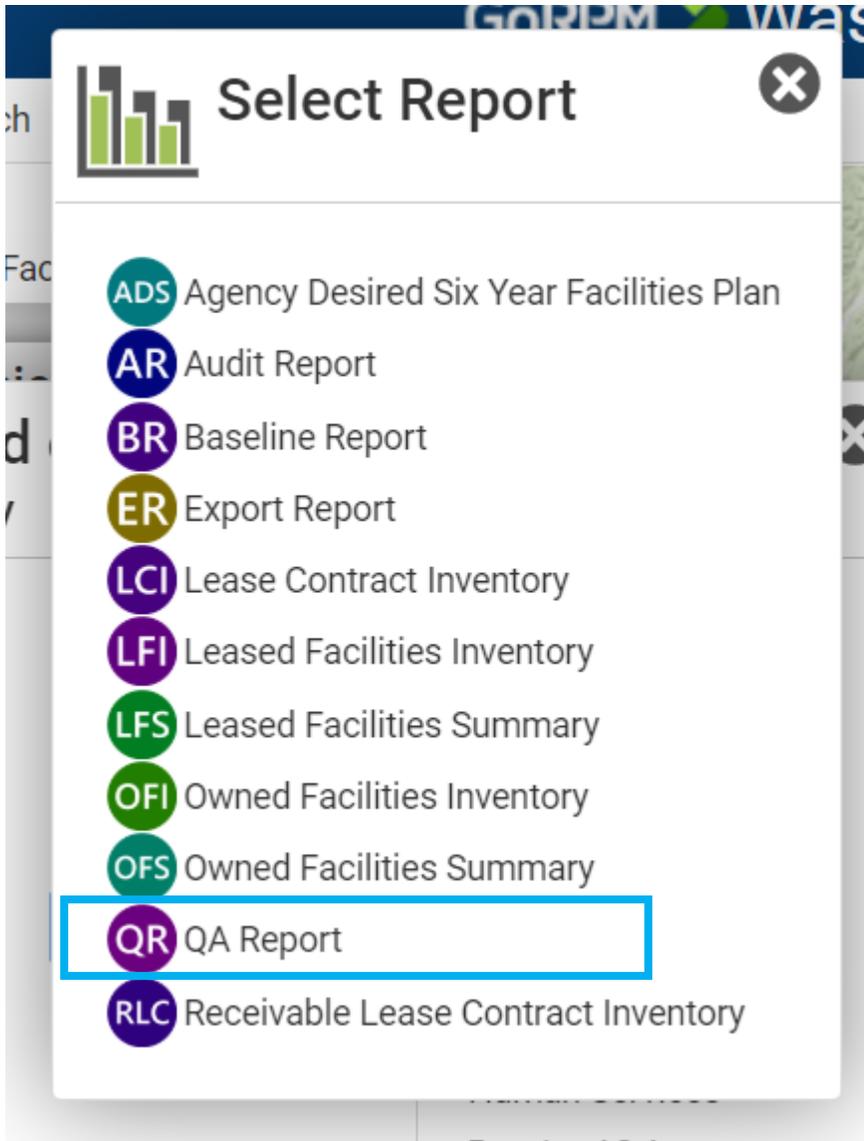


DATA VALIDATION USING THE QA REPORT

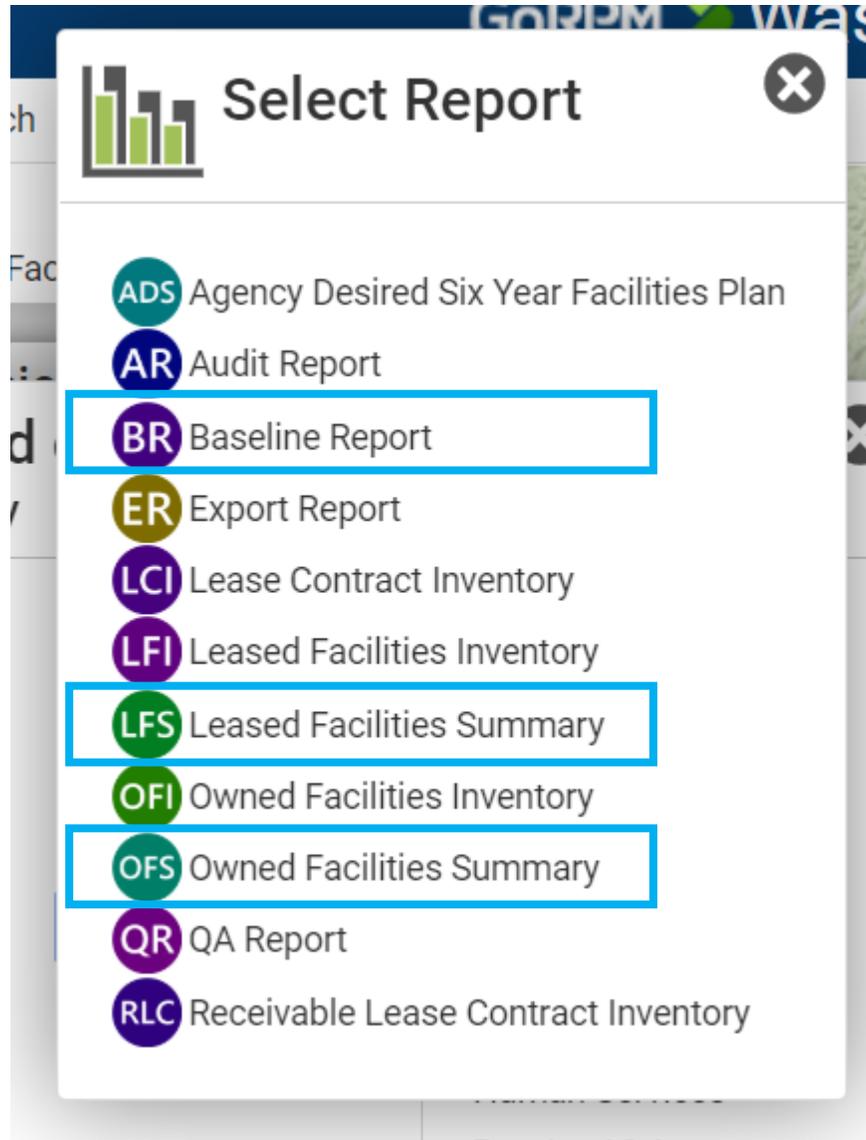
It is each agency's responsibility to validate data prior to submitting reports.

The QA Report is a resource for data validation.

The QA report summarizes the most common type of errors that might be present in the data.



RUNNING A REPORT – AFTER CLEAN QA REPORT



Annual Inventory:

- Leased Facilities Summary
- Owned Facilities Summary

These show the high-level metrics about the agency's portfolio

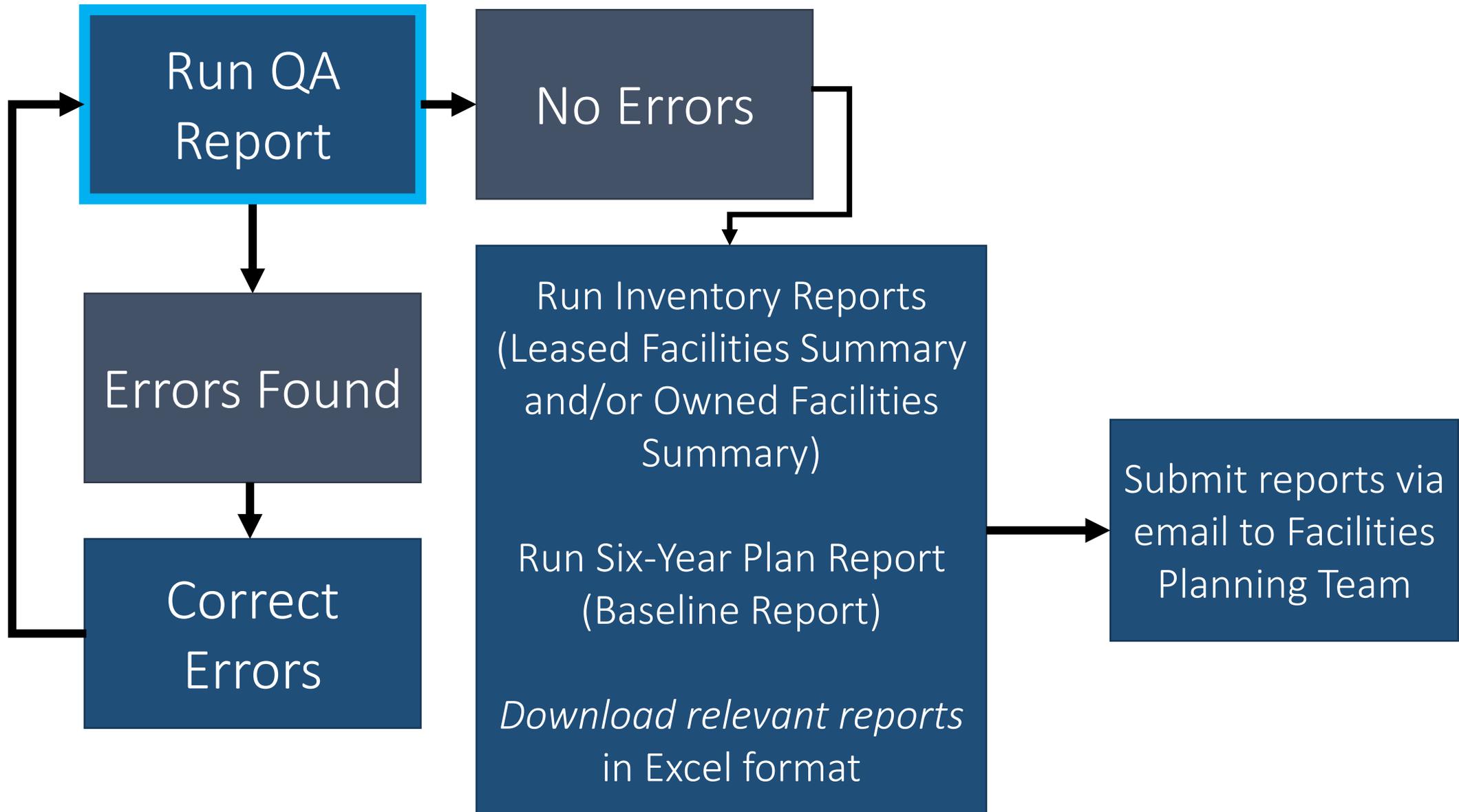
Six-Year Plan:

- Baseline Report

This report shows cost and occupancy data for an agency's in-scope facilities

IMPORTANT: Don't submit these reports until new facilities have been approved.

VALIDATION PROCESS: START WITH QA REPORT



DATA VALIDATION AND REPORT SUBMITTAL - DEMO

QA Report

Baseline Report

Leased Facilities Summary



IMPORTANT DATES



DUE DATES

- All new facilities must be in FPMT: June 1
- Inventory report (Annually): June 23
- Six-Year Plan baseline data due (Biennially): June 23

Agency Desired Plan (not discussed in this training):

- ❖ *Draft Agency Desired Plan (ADP) report Due May 1*
- ❖ *Draft Project Request Forms due July 1*
- ❖ *Final ADP and Project Request Forms Due Sept 1*

For more information, view agency instructions that are sent in early March



WRAPPING UP



LEARNING OBJECTIVES

Understand what the Facilities Portfolio Management Tool is used for.

Know where to launch the new FPMT wizards and which business processes they are available for.

Able to make content changes in FPMT.

Able to follow steps for data validation and system reports.

Know the Facilities Inventory and Six-Year Facilities Plan data requirements and due dates.

Know where to find on-demand resources.

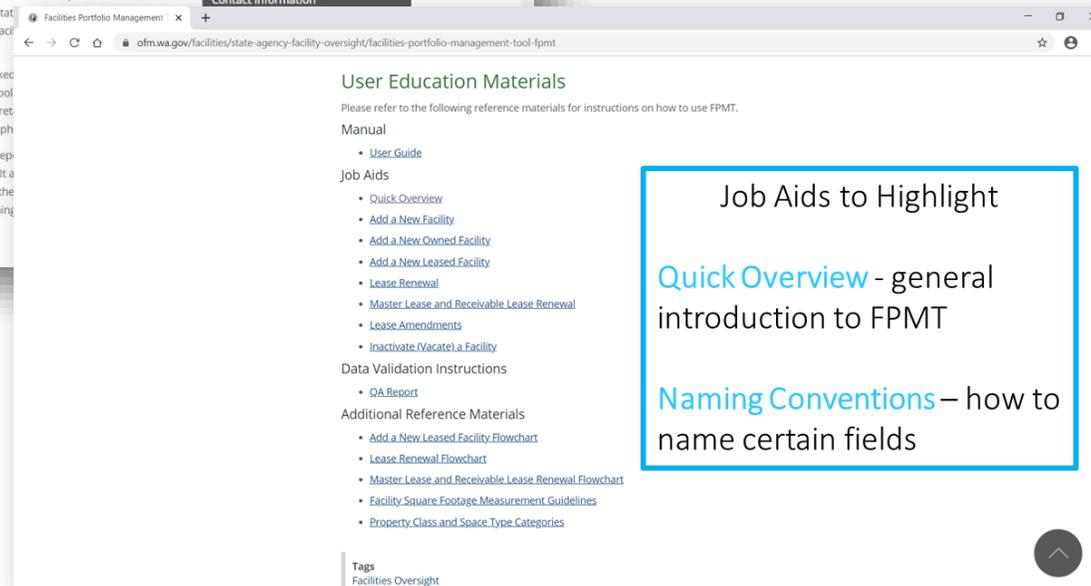
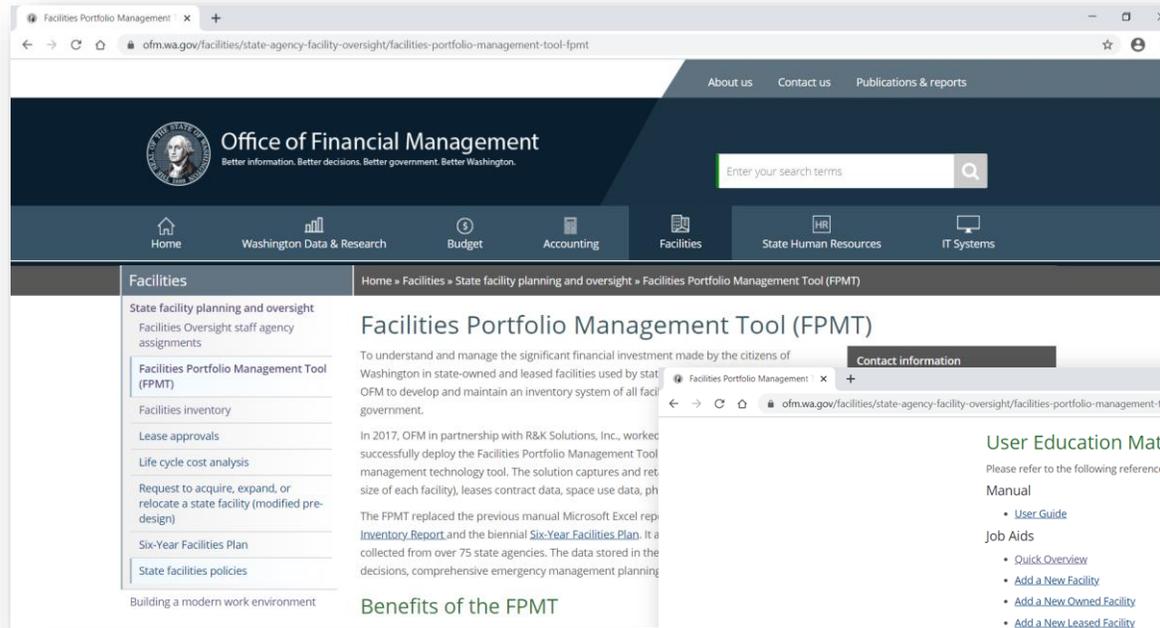


FPMT RESOURCES

Documentation can be found on OFM's FPMT webpage under "Facilities."

<https://ofm.wa.gov/facilities/state-agency-facility-oversight/facilities-portfolio-management-tool-fpmt>

New Account Setup Instructions | Task-specific Job Aids | Data validation instructions



Job Aids to Highlight

[Quick Overview](#) - general introduction to FPMT

[Naming Conventions](#) – how to name certain fields



WHO TO CONTACT WITH QUESTIONS

*Introducing the **NEW!** one-stop shop for all support.*

OFM Help Desk

heretohelp@ofm.wa.gov

360-407-9100





THANK YOU FOR YOUR PARTICIPATION!

Please complete the course survey, which will be emailed in the next few days.

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