

UT FACILITIES SPACE INVENTORY GETTING STARTED

A. Moving Survey Transactions To Your IRIS Favorites Folder

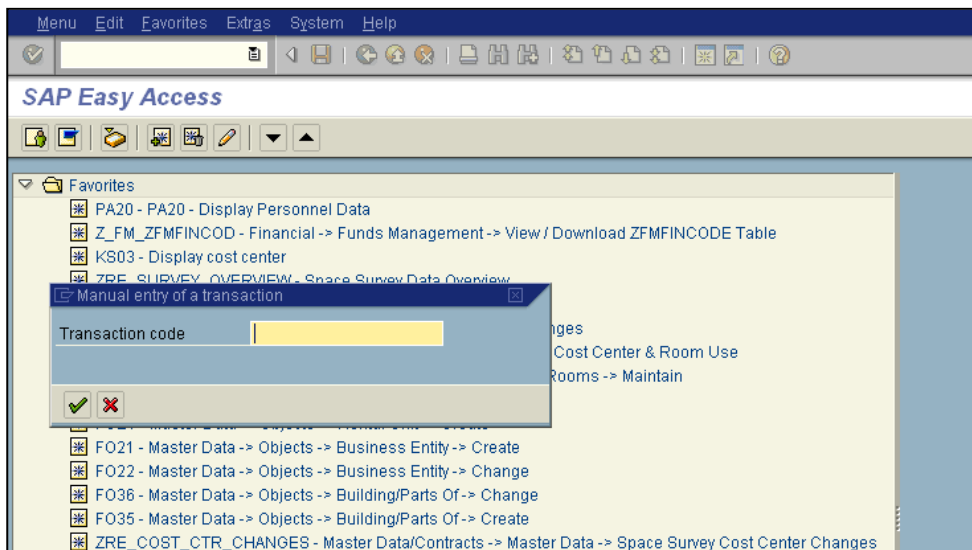
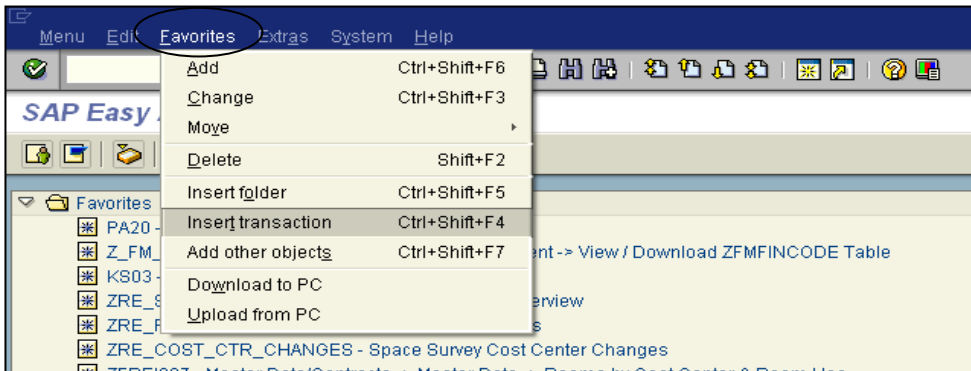
1. Cost Center Representatives

The cost center representative working on the facilities survey project must be an approved IRIS user since the survey resides in the IRIS system. If you have been asked to prepare the survey for your department but are not an IRIS user, please contact your campus facilities coordinator or the UWA Office of Real Property & Space Administration at 865-974-0842.

2. Accessing the Survey Transactions

To access the survey and your current cost center space data, log into the IRIS system and locate the survey transactions. The transaction names that you will be interested in are ZRE_SPACE_SURVEY, ZRE_SPACE_PRSN, and ZRE_INVENTORY_LIST.

- Creating Favorites.** If these survey transactions are not in the “Favorites” area of your IRIS menu, it is suggested that you set them up there. You can do this by choosing ‘Favorites’ from the toolbar at the top of your screen. When you click on this selection a drop down box appears; you should choose ‘Insert transaction’ from this selection box (see figure below).
- Alternate Manual Entry of a Transaction into Favorites.** When the entry box appears (see figure below), enter the transaction name as shown in the previous paragraphs and click the green check mark in the corner of the box. Repeat the process for each transaction you wish to move to the ‘Favorites’ area of your menu.



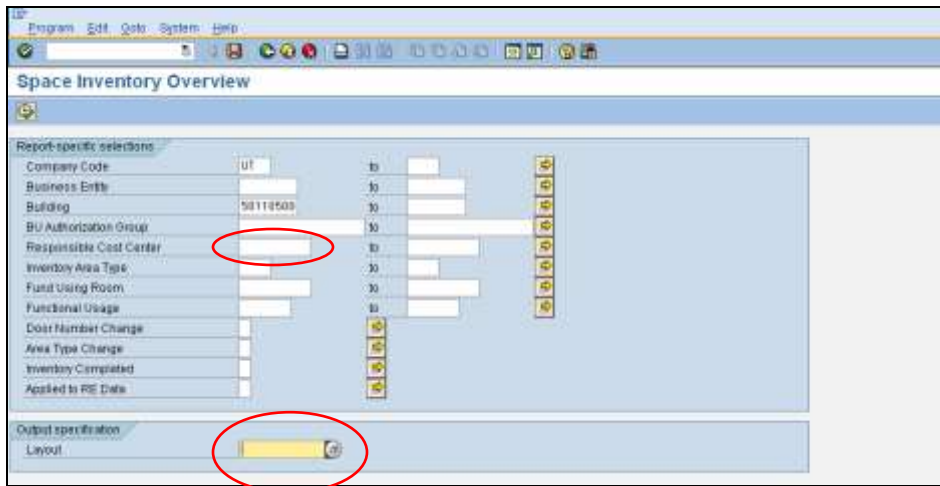
B. Printing a Report of Space Currently Assigned to Your Cost Center

1. Current Data/Updated Data Report

If you are just beginning work on your survey, it is suggested that you print a report that will list all of your rooms in a building and the functional use data that is currently in the facilities system for those rooms. As you complete the update of your room inventory, you may once again want to print this report and compare the revised report with the original printout.

2. IRIS Transaction Selection

Choose the **ZRE_INVENTORY_LIST** transaction. You will see a selection screen as shown below. Fill in the responsible cost center for which you wish to see the space data (see circled field). If you will be entering data for more than one cost center then you will need to run this report multiple times or enter a list of cost centers in the selection screen if you prefer to have all of the cost centers on one report. By entering only the responsible cost center(s), the report will show you all of your space in all buildings. If you know you just have space in one building, you may want to fill in the building field as well with the appropriate building number; this will help the report run faster.



The yellow entry box at the bottom of the selection screen which is labeled 'Layout' has a help bubble. If you click on it you will see several names for varying report layouts. The last layout on the list is **/UT INVENTORY (and is the default layout)** and it shows most room attributes AND the percent usage by each cost center associated with a room. The /UT INVENTORY layout will most likely be the best report for departmental users but feel free to experiment with running any others that look interesting.

You will need to run ZRE_SPACE_PRSN to print a report that shows what personnel are assigned to rooms. Don't forget to update the personnel screen where staff changes have occurred AND to update the Primary Office indicator.

3. Print/Download Report to Excel

You may choose to print the report as it appears on the IRIS screen or download it as an Excel file where you can adjust its appearance, add blank lines for writing notes, etc.

4. Get a Current Floor Plan for your Building(s)

Your campus facilities coordinator should have current floor plans for your building. If those have not been distributed to you already, you may need to request them.

5. User Tips

- By carefully reviewing the information on the printed rooms reports, you will be able to identify any rooms on your list that need no information changed this year. For those rooms, you will be able to enter the **ZRE_SPACE_SURVEY** screens and simply check off the boxes in the 'Finished' column that correspond to the rooms that require no update.
- If you need to distribute portions of your space report to other parties (principal investigators, etc), you may want to download the report as an excel file so that it will be easier to break it up into specific pieces for distribution.
- If you are going to be writing in new information to replace out-dated information on the report, you may want to adjust the row height (in the Excel version of your report) so that you have plenty of white space above each line when it is printed; this will give space on the report for writing in corrections.