UT FACILITIES SPACE INVENTORY
GETTING STARTED

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 are entering survey data for your department but are not an IRIS user, please follow the instructions and fill out all appropriate forms as directed here:

https://iris.tennessee.edu/getting-started/user-request-instructions-notes/

A. **Moving Survey Transactions To Your IRIS Favorites Folder**

1. **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 transactions you will be using are ZRE_SPACE_SURVEY, ZRE_INVENTORY_LIST, and ZRE_SPACE_PRSN.

a. **Creating Favorites**. If these survey transactions are not in the "Favorites" area of your IRIS menu, it is helpful to add them. 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).
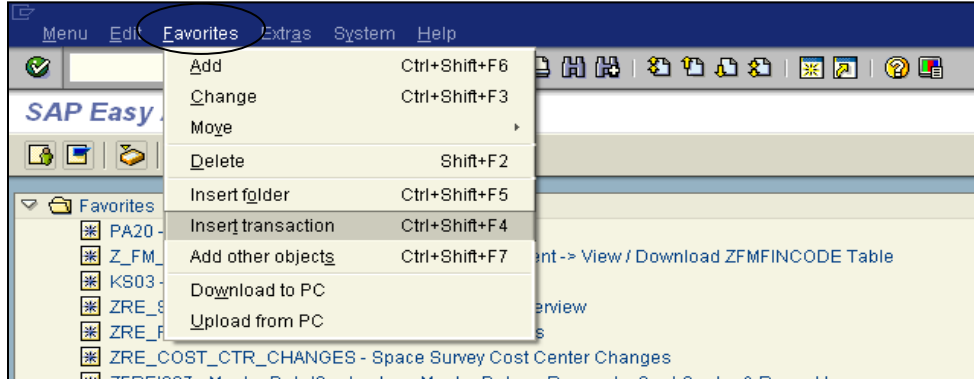
When the entry box appears (see figure below), enter the transaction name as shown in the previous paragraph and click the green check mark in the corner of the box. Repeat the process for each transaction you wish to move to the 'Favorites' area of your menu.
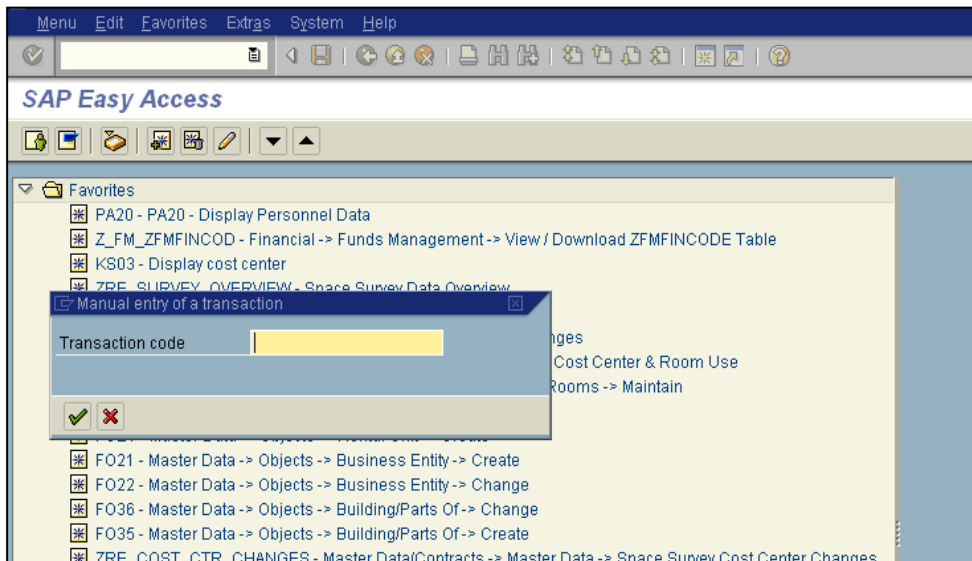
B. **Printing a Report of Space Currently Assigned to Your Cost Center**

1. **Current Data/Updated Data Report**
   Before you begin to work on your survey, you should print a report that lists all your rooms in a building and the functional use data currently in the facilities system. You may choose to print the report as it appears on the IRIS screen; a better choice might be to download the report to an Excel file where you can adjust its appearance -- add blank lines, increase row height for notes, insert additional columns, etc. You should also print a copy when you have completed the survey.

2. **IRIS Transaction Selection**
   Choose the **ZRE_INVENTORY_LIST** transaction to view the selection screen below. Fill in the responsible cost center for which you wish to see space data (top-circled field). If you will be entering data for more than one cost center, you will need to run this report for each cost center; or you can choose to view one report of all your cost centers by entering all of them in the selection screen. This report will show you all of the space assigned to your cost center(s) in <u>all</u> buildings. You can limit to a specific building by adding the Building number to this screen.

The circled entry box at the bottom of the selection screen labeled 'Layout' has a help bubble. If you click on it, you will see several report layouts. The default layout is **/UT INVENTRY,** and this layout includes most of the room attributes AND the percent usage by each cost center, plus personnel IDs associated with the rooms. This layout will most likely be the best report for users but feel free to experiment with any others that look interesting. You can also use the change layout icon once you are in the report to see what additional fields are available.

3. **User Tips**
   a. Carefully review the information on your printed rooms report to identify any rooms on your list that need changes. This review will make updating the survey screens easier. Pay particular attention to Fund Using, especially when sponsored projects are using space. For these rooms, always update the Fund Using to include all sponsored project(s) that used the room anytime during the current survey fiscal year, July 1–June 30.
   b. When you have completed your survey, run **ZRE_INVENTORY_LIST** for each of your cost centers to verify you have marked all your spaces as finished. Directions for using this report and other IRIS reports that you might find helpful for the survey process can be found on the real estate website document "IRIS Transactions to Assist with the Annual Facilities Space Survey".