

UT FACILITIES SPACE INVENTORY GETTING STARTED

Cost Center Representatives

The cost center representative working on the facilities space 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/>

K@te Online Training

Online training is available for the UT Facilities Space Inventory and can be found at k@te.tennessee.edu. Search for “Facilities Inventory Training” to find sessions. You will be notified if additional modules become available.

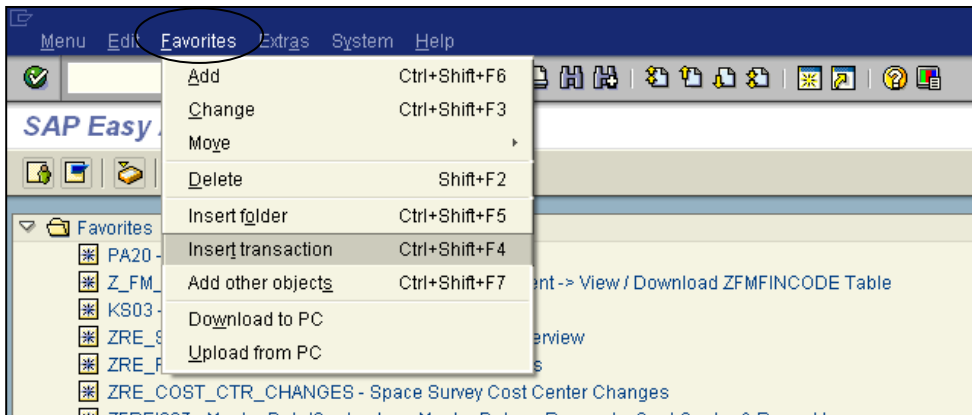
This document provides written instructions for accessing the IRIS transactions used to complete the space survey for your unit. Using these transactions is covered in detail in the online training referenced in the previous paragraph.

A. Moving Survey Transactions To Your IRIS Favorites Folder

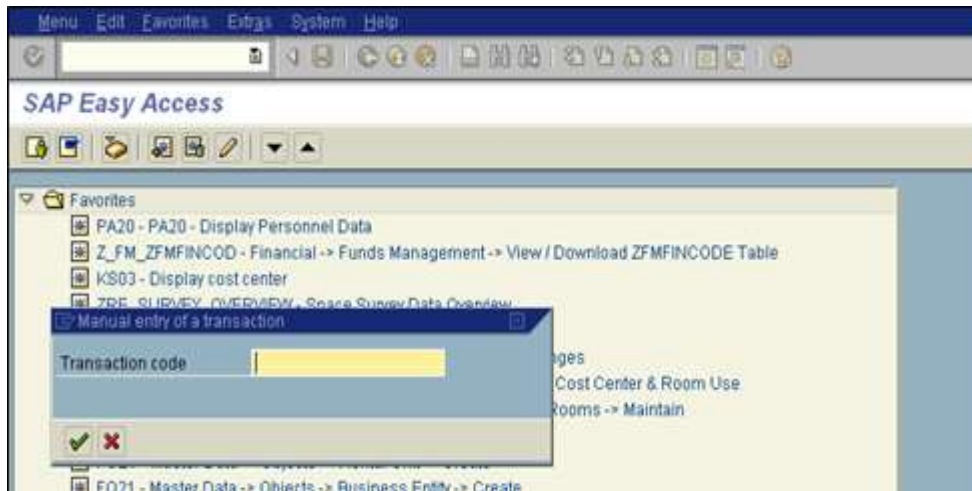
1. Accessing the Survey Transactions

To access the survey and your current cost center space data, log into the IRIS system and locate the survey transactions. The three transactions you will be using are ZRE_INVENTORY_LIST, ZRE_SPACE_PRSN, and ZRE_SPACE_SURVEY.

- 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 dropdown box appears; you should choose ‘Insert transaction’ from this selection box (see figure below).



When the entry box appears (see figure below), enter one the transaction names shown above 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.



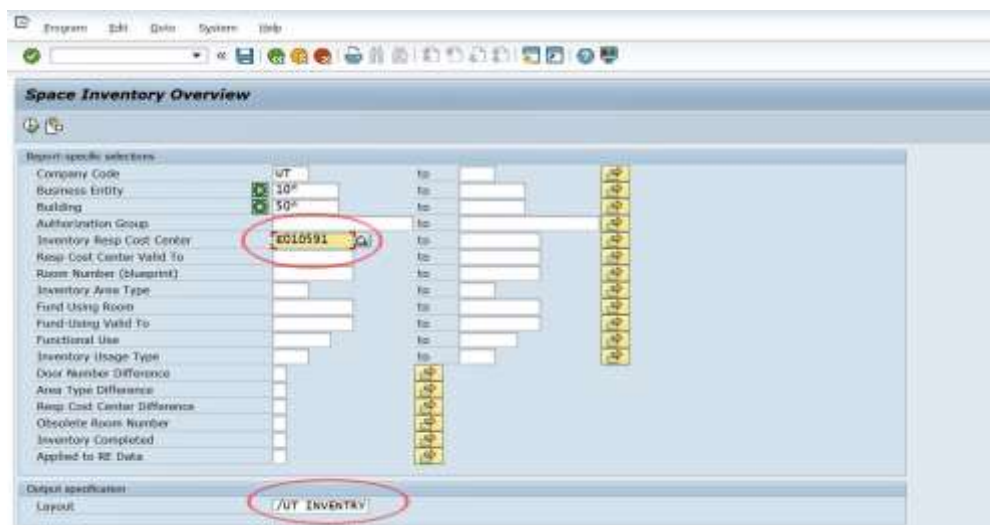
B. Space Survey Transactions in IRIS

1. Printing Current Data

Before you begin to work on your survey, you should print a report that lists all the rooms in a building that are currently listed under your responsible cost center 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 by adding blank lines, increasing row height for notes, inserting additional columns, etc. You should also print a copy when you have completed the survey.

2. IRIS Transactions

a. 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 select all your cost centers at once by entering all of them in the selection screen. This report will show you all the space assigned to your cost center(s) in all 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 INVENTORY**, 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.

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. The transaction **ZRE_SPACE_PERSON** provides a list of all the personnel occupying rooms that are responsible to your cost center. The **ZRE_INVENTORY_LIST** discussed in the last section can only list one person in a room, but since offices and labs can be shared spaces, this personnel report was developed to show all the occupants in a room. The report will include any person that was listed in your survey last year, both active and withdrawn. You may find it useful to print and add notes as needed, as you will need to add or delete personnel when you complete the survey in IRIS. Withdrawn employees may need to be removed from the survey, but if they were performing research anytime during the survey period, you will need to leave them listed as an occupant, and add any new occupants that are now using the space. Some active employees on your list may have moved to another department at UT, so they will need to be removed from your occupant list. Again, research space may include both active and withdrawn employees that used your rooms over different periods of time during the survey fiscal year. Please review your personnel carefully.

c. When you are ready to start entering data in the survey, you will use the transaction **ZRE_SPACE_SURVEY**. There are three screens in this survey transaction, and all spaces will have data entered on the first two screens. Personnel (mainly offices and labs) will also be required to enter data on a third screen to provide a list of occupants during the survey fiscal year. This is where the notes you added to your personnel list from **ZRE_SPACE_PERSON** will be useful.