

IBM TRIRIGA Version 10.3.1

**Reservations: Setting Up Service
Plans and Work Task Templates**

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REVISION HISTORY

Date	Version	Comments
16 Aug 2013	1.0	Initial version.

1 Introduction

In the IBM® TRIRIGA® Reservation application, “back-office” activities involve the creation of work tasks for room setup/breakdown and equipment delivery/pickup. The work tasks for room setup/breakdown include the setup time and breakdown time that are defined for the specific room layout.

The templates that are used to create the work tasks are defined in the service plan. The typical templates for a location reservation include the work task templates for room setup/breakdown and equipment delivery/pickup. The application uses these templates to create the respective work tasks.

2 Service plan for location reservations

Step 1: In the application, navigate to **Home > Tasks > Set Up**. Select **Service Plan**.



Figure 1: Set Up page

Step 2: In the Service Plan list, click **Add**.

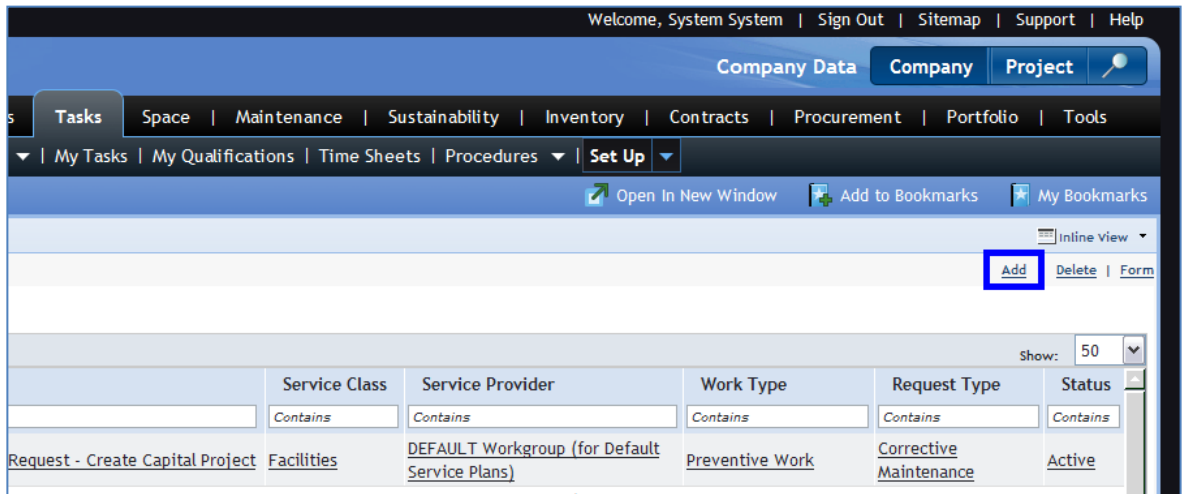


Figure 2: Service Plan list

Step 3: In the Service Plan form, enter the following required data:

- Name
- Request Type (set to Reservation)
- Service Class
- Service Provider
- Create Project or Tasks
- Project Type
- Task Assignment Rule
- Task Assignment Dates Rule
- Task Estimates Rule

The screenshot displays the 'Service Plan' form interface. At the top, there is a title bar with 'Service Plan:' and utility icons for 'Add To Bookmarks', 'Print', and 'Help'. Below the title bar is a navigation menu with tabs for 'General', 'Notes & Documents', 'System', 'Work Flow Instance', 'Associations', and 'Audit Actions'. A 'Create' button and a close 'x' button are located on the right side of the menu. The main content area is divided into three sections: 'General', 'Details', and 'Service Level Defaults'. The 'General' section includes fields for 'ID', 'Status', 'Name' (marked with a red asterisk), and 'Description'. The 'Details' section includes a dropdown for 'Request Type' (set to 'Reservation') and a dropdown for 'Currency' (set to 'US Dollars'). The 'Service Level Defaults' section includes fields for 'Work Type', 'Service Class' (marked with a red asterisk), 'Service Provider', 'Respond Within' (0), 'Follow-Up Within' (0), 'Priority Classification', 'Due Within' (0), and 'Priority Rating' (0). Each field has a search icon and a close icon.

Figure 3: Service Plan form (part 1)

Step 4: In the Task Templates section, click **Add**. Select **Reserve Work Task Template**.

The screenshot shows the 'Service Plan' form with the following sections:

- Assignment Rules:** A list of rules with dropdown menus for 'Create Project or Tasks' (Create Task), 'Project Type', 'Task Assignment Rule' (Use Service Plan), 'Task Assignment Dates Rule', 'Task Estimates Rule', and 'Task Grouping Rule'.
- Estimates:** Fields for 'Estimated Labor Time' (0), 'Estimated Labor Cost' (\$5.00), 'Estimated Material Cost' (\$5.00), and 'Estimated Vendor Cost' (\$5.00), all in US Dollars.
- Task Templates:** A section with an 'Add' button highlighted in a blue box, and a table with columns 'ID', 'Task Name', and 'Description'. The table currently shows '0 total found'.

Figure 4: Service Plan form (part 2)

Step 5: In the Reserve Work Task Template, enter the required and other data:

- Task Name
- Currency
- Task Type (set to Reservation)
- Request Class (set to Meeting Space Reservation)

The screenshot shows the 'Reserve Work Task Template' form with the following sections:

- General:** Fields for 'Task ID', 'Revision' (0), and 'Status'. A required field for 'Task Name' is present, along with a 'Description' text area. A 'Recurrence Pattern Type' dropdown and a 'Currency' dropdown (set to US Dollars) are also visible.
- Details:** Fields for 'Task Type' (Reservation), 'Request Class' (Meeting Space Reservation), 'Task Priority', 'Service Class', and 'Asset Name'.

Figure 5: Reserve Work Task Template form (part 1)

Step 6: In the Reserve Work Task Details section, set the following data:

- Reserve Service Type (set to Available at Reservation Start)

The screenshot shows the 'Reserve Work Task Template' form. The 'Planned' section includes fields for 'Respond Within' (0), 'Follow-Up Within' (0), 'A. Planned Working Days' (0), 'B. Planned Working Hours' (0), 'Total Planned Working Hours (A+B)' (0 hours), and 'Planned Cost' (5.00 US Dollars). The 'Reserve Work Task Details' section shows 'Reserve Service Type' set to 'Available at Reservation Start' and 'For Optional Layout Setup/Breakdown Only' unchecked.

Figure 6: Reserve Work Task Template form (part 2)

Step 7: Click **Create Template** and then **Save & Close**. The new task template is displayed in the Task Templates section of the Service Plan form.

Step 8: Repeat steps 4 to 7, and set the following data:

- Reserve Service Type (set to Available at Reservation End)

Step 9: After the work task templates are created, click **Create** and then **Save & Close** on the Service Plan form. The form closes and is displayed in the Service Plan list.

Here is an example of a completed service plan for a location:

The screenshot shows the 'Service Plan: DEFAULT - Reserve - Location - Create Task - Auto-Assign' form. The 'General' section includes ID 'RESERVE - 001', Name 'DEFAULT - Reserve - Location - Create Task - Auto-Assign', and Description 'Default Service Plan - Use with Reservation Requests'. The 'Details' section shows 'Request Type' as 'Reservation' and 'Currency' as 'US Dollars'. The 'Service Level Defaults' section shows 'Work Type' as 'Customer Service Work', 'Service Class' as 'Conference Services', 'Service Provider' as 'DEFAULT Workgroup (for Default Service Plans)', 'Respond Within' (0), 'Follow-Up Within' (0), 'Due Within' (0), 'Priority Classification', and 'Priority Rating' (0).

Figure 7: Service Plan form (part 3)

3 Service plan for equipment reservations

The procedure for setting up the service plan for equipment reservations is nearly identical to the procedure for location reservations. The only difference is in step 5. In the Reserve Work Task Template, set the Request Class to Asset Reservation.

The screenshot shows the 'Reserve Work Task Template' form with the 'General' tab selected. The 'Request Class' field in the 'Details' section is highlighted with a blue box and contains the text 'Asset Reservation'. Other fields include 'Task Name', 'Description', 'Recurrence Pattern Type', 'Currency' (set to 'US Dollars'), 'Task Type' (set to 'Reservation'), 'Task Priority', 'Service Class', and 'Asset Name'.

Figure 8: Reserve Work Task Template form (equipment)

4 Service plan for vehicle reservations

The procedure for setting up the service plan for vehicle reservations is nearly identical to the procedure for location reservations. The only difference is in step 5. In the Reserve Work Task Template, set the Request Class to Vehicle Reservation.

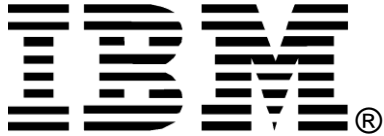
The screenshot shows the 'Reserve Work Task Template' form with the 'General' tab selected. The 'Request Class' field in the 'Details' section is highlighted with a blue box and contains the text 'Vehicle Reservation'. Other fields include 'Task Name', 'Description', 'Recurrence Pattern Type', 'Currency' (set to 'US Dollars'), 'Task Type' (set to 'Reservation'), 'Task Priority', 'Service Class', and 'Asset Name'.

Figure 9: Reserve Work Task Template form (vehicle)

5 Product documentation

Review the [IBM TRIRIGA 10.3.1](#) and [IBM TRIRIGA Application Platform 3.3.1](#) information centers for more information about IBM TRIRIGA products. Depending on the topic, this paper might or might not supersede the standard documentation. In most cases, this paper overrides related information but only for the product version to which this paper applies.

Review the latest [Release Notes](#) for your installed IBM TRIRIGA product version, as they might contain specific information that overrides topics in this paper.



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