Installation Checklist

RMS

Resource Management Suite®
(v3.3 or higher)

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Table of Contents

RMS Installation Checklist

Overview

The RMS Installation Checklist is provided to ensure all the necessary prerequisites are met and all the necessary configuration option are identified prior to the installation of the RMS server.

Please complete this form prior to installation and have it available during the RMS Configuration Wizard portion of the RMS installation. Having all the configuration information and settings documented here will greatly facilitate a successful installation and configuration of RMS.

Hardware System Requirements

Hardware System Requirements		
Does your server hardware meet the minimum requirements for RMS?		**Yes/No**
• Processor	Intel Pentium IV 3 GHz (x86) or Intel Pentium Dual/Quad Core 2.0 GHz	
• Memory	2 GB	
• Display	1024x768 resolution	
• Hard Disk	500 MB available space for RMS application files and database	
Note: RMS must be installed on a dedicated server class machine.		

Yes to all	Please continue to the next step.
No to any	You must obtain a server that meets these minimum requirements to install RMS.

Server Operating System

Server Operating System	
Do you have a compatible server operating system installed?	**Yes/No**
• Windows 2003 Server (SP2)	
• Windows 2008 Server (32-bit only)	

Yes	Please continue to the next step.
No	You must obtain a compatible server operating system to install RMS.

Does your server operating system have the latest service packs installed?	**Yes/No**
• Windows 2003 Server - Service Pack 2 (current as of 2009-05-29)	
• Windows 2008 Server - Service Pack 2 (current as of 2009-05-29)	

Yes	Please continue to the next step.
No	You must obtain and install the latest operating system service packs to install RMS.

Does your server operating system have Internet Information Services installed?	**Yes/No**
• Windows 2003 Server - Internet Information Services (IIS) 6.0	
• Windows 2008 Server (32-bit only) - Internet Information Services (IIS) 7.0	

Yes	Please continue to the next step.
No	You must install IIS on your server for RMS to serve web pages.
	While this component is optional for the Windows Server operating system, it is required by the RMS application. The installer will not continue if this component is not detected.

Do you have an administrative logon account to the server where RMS will be installed?	
Yes	Please continue to the next step.
No	You must obtain such an account, and logon to the server with a user account that has administrative access to the server.
	RMS is a system level application and requires administrative access to install and configure the RMS services and security settings.

Additional Software Dependencies

Additional Software Dependencies	
Does your server have the Microsoft .NET Framework 2.0 installed?	
Yes	Please continue to the next step.
No	You must obtain and install the Microsoft .NET Framework 2.0 before installing RMS. The installer will not continue if this component is not detected.

Does your server have Adobe Acrobat Reader installed?	
Yes	Please continue to the next step.
No	You must obtain and install Adobe Acrobat Reader to be able to display the RMS help files.

Database Platform

Database Platform	
Do you have a compatible database platform where the RMS database can be installed?	**Yes/No**
• Microsoft SQL Server 2008 Express Edition (for systems with less than 300 rooms only; download available free from Microsoft)	
• Microsoft SQL Server 2008 Standard Edition	
• Microsoft SQL Server 2008 Enterprise Edition	
• Microsoft SQL Server 2005 Express Edition (for systems with less than 300 rooms only; download available free from Microsoft)	
• Microsoft SQL Server 2005 Standard Edition	
• Microsoft SQL Server 2005 Enterprise Edition	
Note: For RMS systems with more than 300 rooms, the database must be installed on an external database server and not installed on the same server machine as the RMS software.	

Yes	Please continue to the next step.
No	You must obtain access to or install a compatible database platform for the RMS database. Microsoft SQL Server 2005 Express Edition is a no cost solution for small to medium sized RMS installations.
	If upgrading from RMS 2.x using an Access database, you can download and install SQL Server 2005 Express Edition for use with RMS 3.3.
	The RMS 3.3 installation will migrate your existing data from the existing RMS 2.x database to the new RMS 3.3 database.
	Microsoft SQL Server 2005 Express Edition can be downloaded using this link:
	http://msdn.microsoft.com/vstudio/express/sql/download/
Note: If installing Microsoft SQL Server 2005 Express Edition, refer to the "Installing SQL Server 2005 Express Edition" section in the RMS Database Administrator's Guide for specific information you will need for installation and configuration for Microsoft SQL Server 2005 Express Edition.	

Database Access

Database Access			
Database Server			
Using Windows Authentication?	Yes		
	No	**Username:**	
		Password:	
Database Name (Catalog)			(Default = RMS)

Database Server	This is the server name or path to the database server. If using Microsoft SQL 2005 Express Edition, this field would also contain the database instance name (syntax = "*server_name\instance_name*")
Windows Authentication	If you are using Windows Authentication to access the database server, then no username or password is needed. ***Note***: *If you are using Windows Authentication for RMS database access, refer to the "Windows Authentication" section in the RMS Database Administrator's Guide for additional configuration requirements.*
Username	If you are not using Windows Authentication, then a username is needed to logon to the database server.
Password	If you are not using Windows Authentication, then a password is needed to logon to the database server.
Database Name	This is the database name to create and use for the RMS system. By default this is named 'RMS'. Database name is also known as "Catalog".

Scheduling System

Scheduling System		
RMS supports both an internal scheduling system and interfaces to the following external scheduling systems:		
Please complete the following information:		
Scheduling System	**Internal Scheduling**	
	External Scheduling	• Microsoft Exchange
		• Microsoft Outlook (stand-alone mode)
		• IBM Lotus Notes
		• Novell GroupWise
		• Dean Evans EMS
		• College Net R25
		• PeopleCube Resource Scheduler
		• Planon Integrated Workspace
	Note: *Refer to each Plug-In Installation Guide for details on supported versions and software requirements.*	
Note: *If interfacing with an External Scheduling System, please review the corresponding RMS Plug-In Installation Guide for details on installing and configuring the external scheduling system.*		
Note: *RMS is capable of supporting multiple (up to 12) instances of Scheduling on a single NetLinx Master. If you intend to run multiple instances of Scheduling on a Master, then that Master should be dedicated solely to RMS Scheduling only. See the Scheduling Page section of the RMS Administrator's Guide for details.*		

Internet Information Services - Virtual Directory

Internet Information Services - Virtual Directory	
RMS provides a web user interface for the administration and management of the application.	
The RMS installation will create a new virtual directory in the Windows Internet Information Services web services. During the installation you can specify the virtual directory name used to access RMS.	
This virtual directory name is used as part of the path in the URL to access the RMS web application.	
`http://server_name/virtual_directotry`	
Please complete the following information:	
Virtual Directory Name	**(Default = RMS)**

RMS Licensing

RMS Licensing	
RMS can operate with limited functionality in STANDARD edition. However, if you want the full capabilities of RMS you must purchase the PREMIUM edition from AMX.	
Upon purchasing PREMIUM edition, you will receive a server serial number. This serial number will be needed during the installation to license the RMS server.	
Please complete the following information:	
Server Serial Number	

If your RMS server is behind a firewall or is otherwise unable to connect to AMX and finalize the authorization process, you can call AMX and receive a manual authorization key.	
Authorization Key	

Once the Premium edition of the RMS server is licensed, you must also enter client licenses for the number of rooms you wish to use with RMS for either Asset management, Scheduling, or both.	
Please complete the following information:	

Client Certificate ID	Authentication Key

RMS TCP/IP Communications

RMS TCP/IP Communications	
RMS uses TCP/IP communications between the RMS server and the remote NetLinx systems.	
Please complete the following information:	
TCP/IP Server Port Number	**(Default = 3839. This is an IANA registered port number for RMS)**
Does your server have a firewall that will block TCP/IP communication for this port?	
Yes	You will need to create a PINHOLE or exception for TCP/IP communications on the specified TCP/IP port for RMS communications.
No	Please continue to the next step.

Does your network router restrict or block traffic on this TCP/IP port?	
Yes	You will need to create a PINHOLE or exception for TCP/IP communications on the specified TCP/IP port for RMS communications.
No	Please continue to the next step.

RMS Security Settings

RMS Security Settings				
RMS provides a flexible user account management system.				
Please complete the following information:				
Enable User Account Management	*No*			
	Yes	**Allow Anonymous Access:**	**Yes**	**No**
		Default Admin Username:	(Default = Admin)	
		Default Admin Password:		

Enable User Account Management	If you would like any user that can access the RMS web pages to have full access to all RMS features and functions, then disable user account management.
	If you would like restricted user logon RMS web pages where you can manage individual user's access permissions, then enable user account management.
Allow Anonymous Access	If User Account Management is enabled, then you will also have the option to allow or disallow anonymous access to the RMS web pages.
	If anonymous access is allowed, users will be able to view the scheduling pages in RMS without having to logon with a user account.
Default Admin Username	If User Account Management is enabled, then you must provide a username for the default administrator account.
Default Admin Password	If User Account Management is enabled, then you must provide a password for the default administrator account.
Note: RMS also supports Windows Authentication for authenticating users in the RMS web pages. RMS will automatically detect if your website is configured for Windows Authentication. User account management should be enabled and anonymous access should be disallowed when using Windows Authentication.	
To learn more, or to configure your system for Windows Authentication, please review the Window Authentication section of the RMS Administrator's Guide.	

SMTP Email Server

SMTP Email Server					
RMS supports Simple Mail Transport Protocol (SMTP) email for all outbound email notifications.					
In order to receive email notifications, the following SMTP information will be needed.					
Please complete the following information:					
Allow SMTP Messaging	*No*				
	Yes	**SMTP Server Address**			
		SMTP Server Port	(Default = 25)		
		SMTP Server Requires Authentication	*No*		
			Yes	**Username:**	
				Password	
		SMTP Email Address			
		Friendly Email Name			
		Reply-To Email Address			

SNPP Paging Provider

SNPP Paging Provider			
RMS support Simple Network Paging Protocol (SNPP) outbound electronic alpha/text paging notifications. In order to receive SNPP text pages the following SNPP information will be needed.			
Please complete the following information:			
Enable SNPP Paging	*No*		
	Yes	**SNPP Provider**	Select from the pre-defined list in the RMS Configuration Wizard or add your own SNPP provider information

SNMP Management Server

SNMP Management Server			
RMS supports the Simple Network Management Protocol for extending RMS information to your SNMP management console.			
Please complete the following information:			
Enable SNMP Services	*No*		
	Yes	**SNMP Agent Port**	(Default = 161)
		SNMP Community	
		SNMP Trap Community	
		SNMP Trap Recipients	

RFID Tracking Options

RFID Tracking Options			
RMS supports tracking devices with RFID tags.			
Please complete the following information:			
Enable RFID Tracking	*No*		
	Yes	**Enable RFID Historical Reporting**	
		Delete RFID Entries After	(Default = 90)

RMS Logging Options

RMS Logging Options				
RMS supports the logging of information to an internal log in the database and to the Windows Event log.				
Please complete the following information:				
Enable Logging to the Internal Database Log	*No*			
	Yes	Maximum Number of Log Entries To Retain		(Default = 1000)
		Delete Log Entries After (Days)		(Default = 90)
Enable Logging To the Windows Event Log	*No*			
	Yes	Log Informational Messages	**Yes**	**No**
		Log Warning Messages	**Yes**	**No**
		Log Error Messages	**Yes**	**No**

Maximum Log Entries	If Internal Logging is enabled, you can specify the maximum number of log records to retain for log reporting purposes. The RMS services will automatically purge the oldest log records to maintain a manageable database size.
Delete Log Entries After	If Internal Logging is enabled, you can specify the number of days to retain historical data for log reporting purposes. The RMS services will automatically purge data records that are older than the specified number of days in order to maintain a manageable database size.

SYSLOG Messaging

SYSLOG Messaging			
RMS supports broadcasting SYSLOG messages across the network to a SYSLOG listening server.			
Please complete the following information:			
Enable SYSLOG Messaging	*No*		
	Yes	SYSLOG Server Address	
		SYSLOG Server Port	(Default = 514)
		SYSLOG Facility ID	Select from listing in RMS Configuration Wizard

RMS Reporting Options

RMS Reporting Options			
RMS can provide historical and statistical reports based on system-collected data using the following configuration settings.			
Please complete the following information:			
Enable Reporting	*No*		
	Yes	**Delete Report Entries After (Days)**	(Default = 90)

Delete Report Entries After	If Reporting is enabled, you can specify the number of days to retain historical data for reporting purposes.
	The RMS services will automatically purge data records that are older than the specified number of days in order to maintain a manageable database size.

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