



Installation Guide

# NSS-RMS-PLAN

RMS Planon Scheduling Plug-in



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# RMS Planon IWMS Scheduling Interface

## Overview

Through the RMS Planon Interface, users can now schedule appointments and events through the Planon Integrated Workspace Management Software and display the reservation information on AMX touch panels.

The RMS Planon Interface also enables scheduled events to initiate system presets and provide electronic signage capabilities through AMX touch panels.

The RMS application allows a room to read schedule information from the designated scheduling folder. This allows you to use a single folder for multiple rooms in the RMS application.

To read schedule information from IWMS, the RMS Planon Interface connects to the scheduling folder and accesses the reservation information.

The Configuration Wizard allows you to set the folder for the RMS Scheduling Manager Service but you must configure Planon's IWMS to allow access to the folders used by the RMS application.

See the *Planon Integrated Workspace Management Software* documentation for more details on how to configure IWMS.

### RMS Planon IWMS Scheduling Interface - Technical Specifications / Requirements

Planon Software Requirements	"Planon software version <b>FO-SE 4.33 matchcode h</b> .
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## Installation Checklist

### RMS Planon IWMS Scheduling Interface Install Checklist

<ul style="list-style-type: none"> <li>• Install the RMS Planon Interface using the Windows RMSPlanon.exe setup executable and following the installation instructions.</li> </ul>
<ul style="list-style-type: none"> <li>• Create a reservation folder for each schedulable room in IWMS. You can use a single IWMS reservation folder or multiple RMS rooms to accomplish this. See the <i>Planon Integrated Workspace Management Software</i> documentation for more details on how to configure IWMS.</li> </ul>
<ul style="list-style-type: none"> <li>• In the Configuration Wizard, select <i>External Appointment Management/Schedule System</i> on the Scheduling page in the Welcome section.</li> </ul>
<ul style="list-style-type: none"> <li>• In the Configuration Wizard, configure the Scheduling Manager Service to run as the <i>Local System</i> account.</li> </ul>
<ul style="list-style-type: none"> <li>• In the Configuration Wizard, you must register and configure the AMX RMS Scheduling Planon Plugin on Scheduling page of the System Settings section.</li> </ul>
<b>For Each Room in the RMS application:</b>
<ul style="list-style-type: none"> <li>• When adding a new room, after you click the <b>Save</b> button on the <i>Create New Room</i> page:</li> <li>• Fill in the <b>Building Code</b> and <b>Room Code</b> fields from the matching information in the Planon IWMS</li> <li>• Click <b>Save</b>.</li> </ul>



# RMS Planon Plug-in Configuration

## Overview

To use the RMS Planon Interface scheduling plug-in, it must first be registered.



NOTE

*The RMS application must be configured for External Scheduling Systems for the scheduling plug-in configuration dialog to be displayed.*

- Only a single scheduling plug-in may be registered at one time.
- The plug-in configuration is performed in the Configuration Wizard under the *System Settings*, *Scheduling* node of the navigation tree (FIG. 1).



**FIG. 1** RMS Configuration Wizard - Scheduling System

To register the RMS Planon Interface, place a checkmark in the box to the left of the entry in the scheduling plug-in list (FIG. 2):

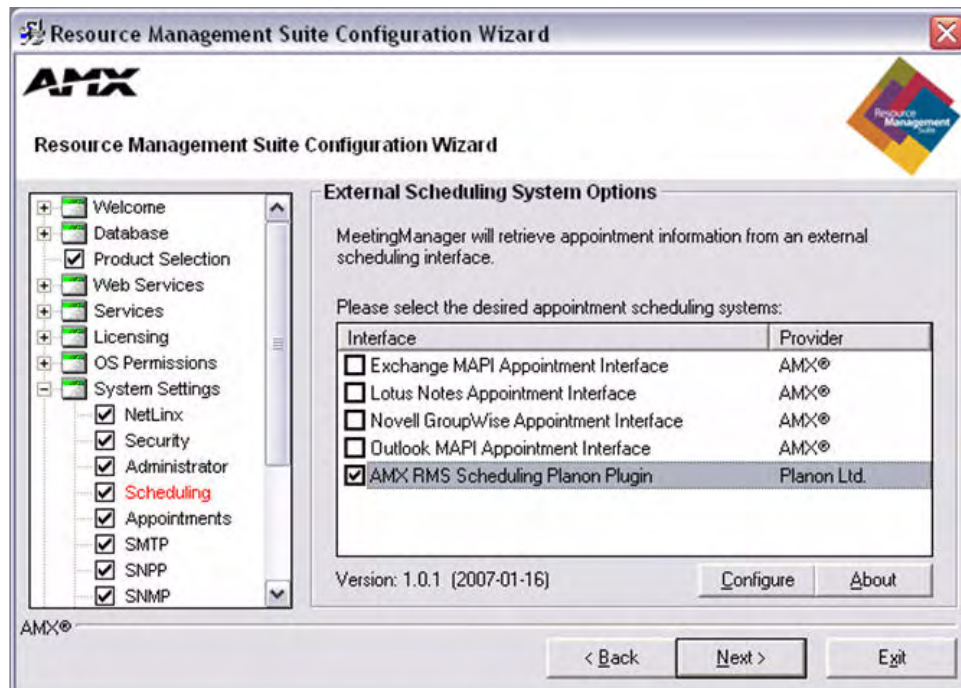


FIG. 2 RMS Configuration Wizard - External Scheduling System Options

This invokes the *Plugin Global Options* dialog (FIG. 3):

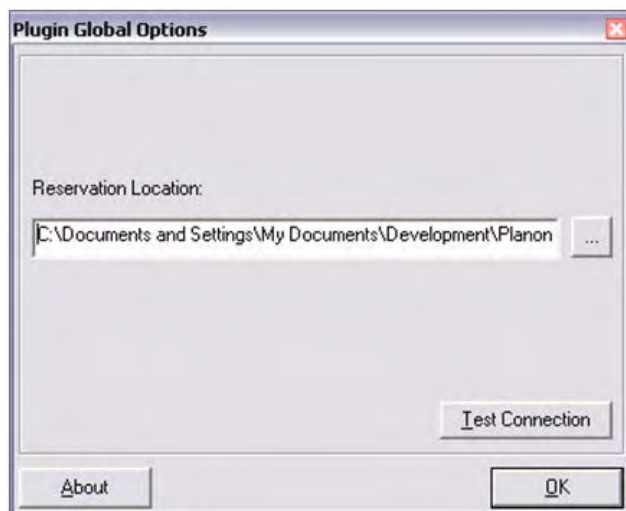


FIG. 3 Plugin Global Options dialog

The *Plugin Global Options* dialog allows you to set the location of reservation folder that was designated by the Planon IWMS application.

Use the **Browse** button (...) beside the text field to navigate to the correct location.

After entering your Planon IWMS reservation location, it is important to test the access to the reservation event data.

To test the synchronization of data between the Planon IWMS application and RMS, click the **Test Connection** button.

- If a connection to the Planon IWMS was successful, the following message is displayed (FIG. 4):



**FIG. 4** Test Planon IWMS dialog

*Planon IWMS reservation files successfully located.*

- If the test fails, a possible cause could be that the Planon IWMS application has not yet processed any reservations. This does not affect the overall scheduling process.

The scheduling service manager will constantly poll the location for reservation events and synchronize the scheduling system when an event is found.

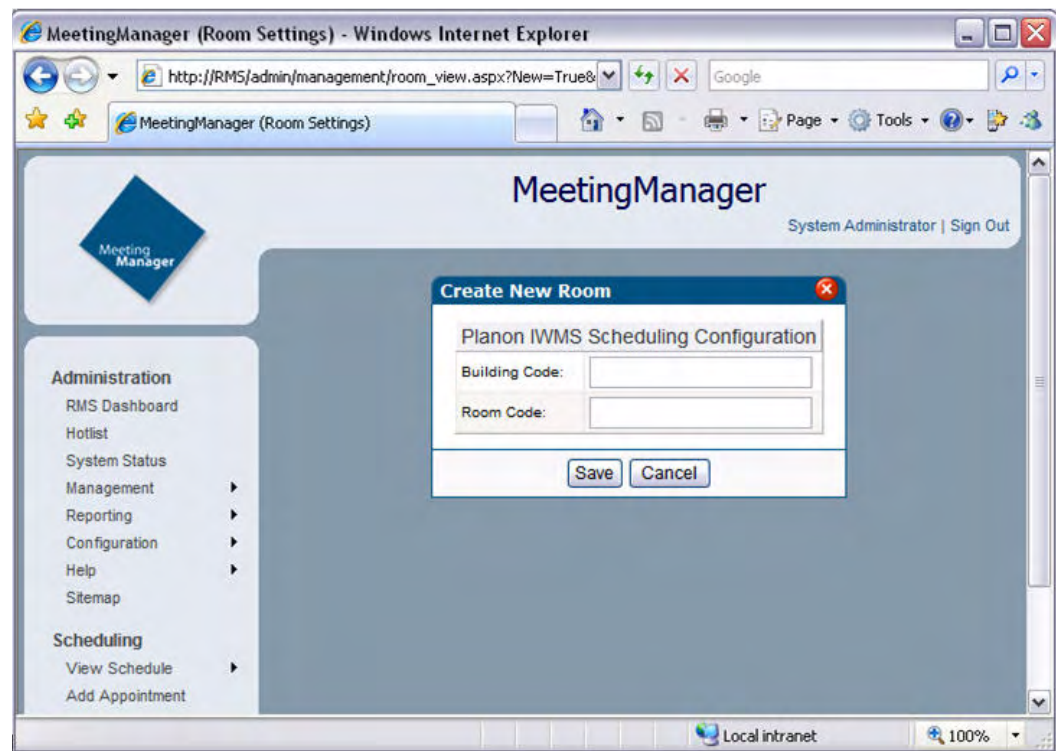


# Room Scheduling Configuration

## Overview

For a given room to access a specific reservation on an IWMS reservation, the room must first be configured with the appropriate access information.

In the web administrative interface, when you add a new room or modify an existing room, you are provided with *Room Scheduling Settings* (FIG. 5).



**FIG. 5** Room Scheduling Settings

The following two fields identify the building and room in which the reservation event was scheduled for. These are the keys used for matching the Planon IWMS reservation.

- **Building Code:** The Building Code field in the Planon IWMS Scheduling Configuration section must match the Property Code provided by the Planon IWMS application.
- **Room Code:** The Room Code field in the Planon IWMS Scheduling Configuration section must match the Reservation Unit Code provided by the Planon IWMS application.

Once you have completed the room scheduling plug-in configuration and tested the reservation successfully, make sure to click the Save button in the room scheduling plug-in configuration window to store your settings.



# Known Issues

1. Recurring event instances in Planon are handled as individual appointment reservations in RMS.
2. *Deleting* a scheduled individual or recurring event will not remove the event from RMS; *Cancelling* a scheduled individual or recurring event removes the event from RMS.







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