



Installation Guide

# NSS-RMS-LN

RMS Lotus Notes  
Appointment Interface Plug-in



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# RMS Lotus Notes Appointment Interface

## Overview

The RMS application installation includes the *Lotus Notes Appointment Interface* for appointment synchronization with Lotus Notes servers. The *Lotus Notes Appointment Interface* provides access to multiple Notes resources and mailboxes. This variety of connection options provides a robust and flexible solution for attaching RMS application rooms to Notes calendars.

If you are using the Appointment Management features of the RMS application and you will be using the RMS application with Lotus Notes, some additional configuration is needed. Each room in the RMS application that has a schedule on the Notes server will need to have access to that schedule in Notes. You will need to configure your Notes server to allow access to a calendar view for each room in the RMS application. The calendar view in Notes can be a standard resource entered in the Resource Reservation database or a calendar view of a mail user.

To read schedule information from Lotus Notes, the *Lotus Notes Appointment Interface* will connect to the Notes server, login to a mailbox and access a mailbox or room resource containing schedule information. In order to do this, the user context of the *Lotus Notes Appointment Interface* must have access to the Notes user mailbox database or resource reservation database from which it will read. A Lotus Notes client must be installed on the RMS application server and a Notes account must allow a login from the Notes Client. This account will need access to each Notes user mailbox database or resource reservation database from which schedule information will be read.

See the *Configuring Lotus Notes Mailboxes* section on page 11 for more details on configuring Notes.

### RMS Lotus Notes Appointment Interface - Technical Specifications / Requirements

Lotus Notes Software Requirements	• Lotus Notes R7/R8
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## Installation Checklist

- The Notes Client must be installed on the RMS application server. An account must be created for the RMS application and this account must be able to logon using the installed Lotus Notes client.
- The RMS application account must have read access to all user mail databases and/or resource reservations database from which the RMS application will read scheduling information.

### Lotus Notes Appointment Interface Install Checklist

- |   |
|---|
| • Create or identify a user mailbox or room resource for each schedulable room in Notes.  |
| • Create a user and grant that user access to the databases that contain the schedule information.<br>See the <i>Configuring Lotus Notes Mailboxes</i> section on page 11 for more details on how to configure Notes. |
| • Ensure the Notes client is installed on the RMS application server and that the newly created account can logon to Notes using the installed Notes Client.  |
| • In the Configuration Wizard, select <i>External Appointment Management/Schedule System</i> on the Scheduling page in the Welcome section.   |
| • In the Configuration Wizard, configure the Scheduling Manager Service to run as the system user (default).  |
| • In the Configuration Wizard, you must register and configure the <i>Lotus Notes Appointment Interface</i> scheduling plug-in.   |

For Each Room in the RMS application:

When adding a new room, the configuration fields for Lotus Notes are displayed at the bottom of the modify room page.

- Select the appropriate Notes synchronization type:  
Select *Resource* to synchronize this room to a Lotus Notes room resource.  
Select *Mailbox* to synchronize this room to a Lotus Notes user mailbox.
- After selecting the synchronization type, select the corresponding target user or room resource to synchronize with this room.
- Ensure that a Scheduling license is assigned to each room.
- Use the **Test** button to ensure that the RMS application can access the schedule information.



# RMS Lotus Notes Plug-in Configuration

## Overview

To use the *Lotus Notes Appointment Interface* scheduling plug-in, it must first be registered (FIG. 1).

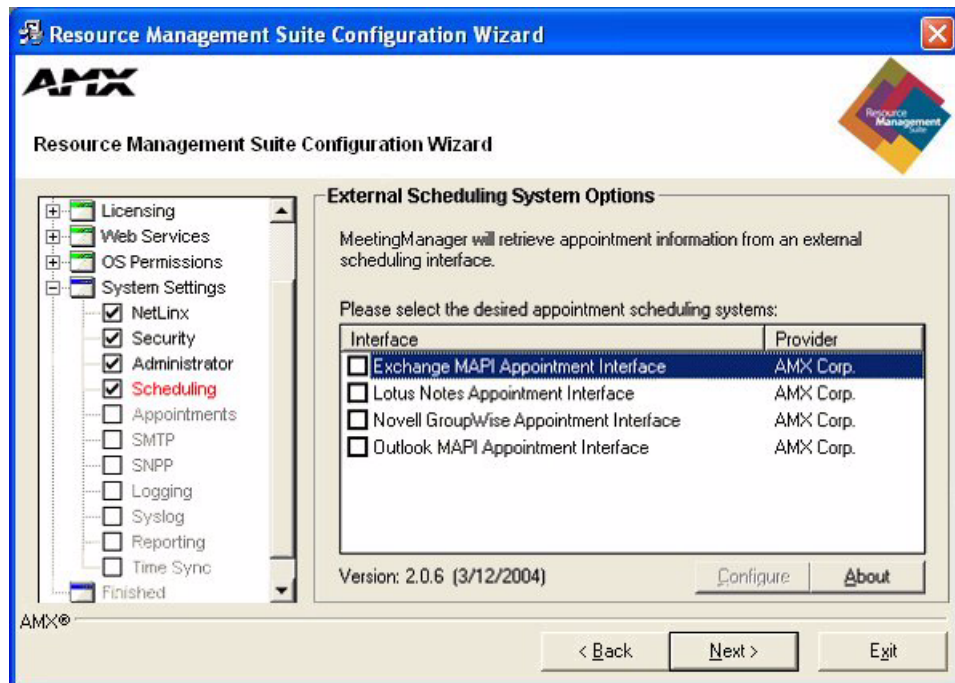


FIG. 1 RMS Configuration Wizard - External Scheduling System Options

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.



NOTE

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

To view version information or provider information about the scheduling plug-in, select the *Lotus Notes Appointment Interface* from the scheduling plug-in listing, then click the **About** button. An **About** dialog will appear providing information about the specific scheduling plug-in.

## Registering the Lotus Notes Appointment Interface

To register the *Lotus Notes Appointment Interface*,

1. Place a checkmark in the box to the left of the entry in the scheduling plug-in list to access the *Plugin Global Options* dialog.
  - The *Lotus Notes* tab of the Plugin Global Options dialog provides the RMS application with a password with which to login to Notes.
  - The RMS application will use the account the Notes Client has been configured as to login.
2. Enter the Domino server name and the password for this account (FIG. 2).

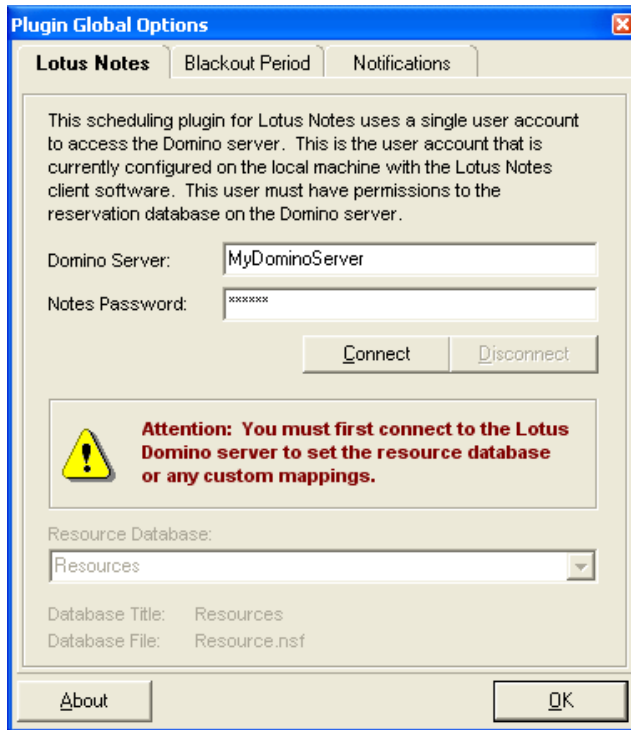


FIG. 2 Plugin Global Options dialog - Lotus Notes Tab

3. After entering the Domino server and Notes password, connect to the Lotus Domino server by clicking the **Connect** button.
4. If access to Notes was successful, the *Test Lotus Notes Connection* dialog displays a success message (FIG. 3).

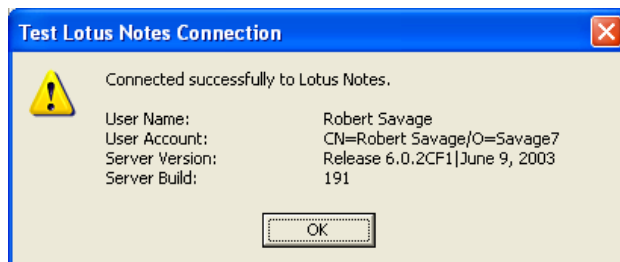


FIG. 3 Test Lotus Notes Connection dialog

After a successful connection to the Domino server has been established, the next item to configure is the Resource Reservation Database.



## Configuring the Resource Reservation Database

At the bottom of the *Lotus Notes* tab is a drop down list of all the databases provided on the Domino server (FIG. 4).

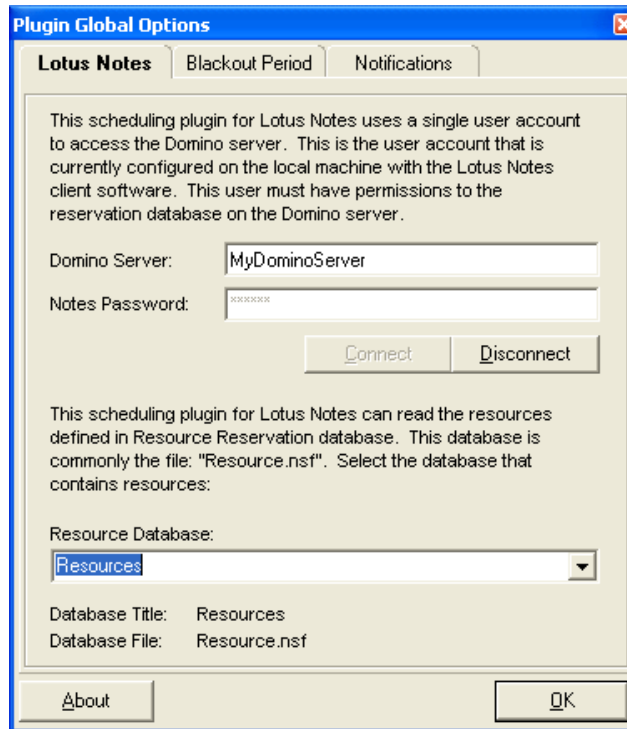


FIG. 4 Resource Reservation Database

Select the *Resource Database* from the list.

- The name of this database will vary depending on how it was named when it was created.
- In general practice it is often the database file name: "**resource.nsf**".
- This database is the central data store for all resources and resource reservations in your organization, created using the Resource Reservations database template that is installed with Lotus Domino server.

## Configuring a Blackout Period

The *Blackout Period* tab (FIG. 5) contains the settings for scheduling synchronization/trolling blackout. During this blackout period, the RMS application will not attempt to establish a connection to any Notes server.

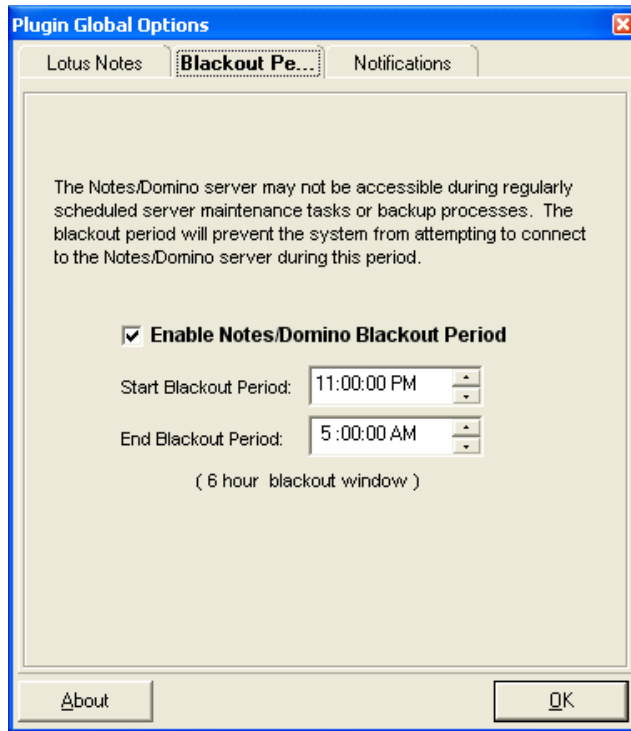


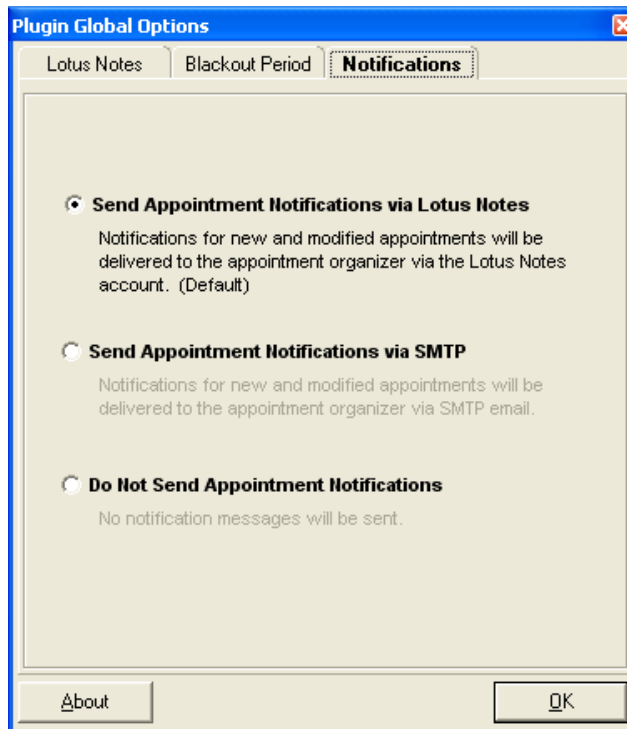
FIG. 5 Plugin Global Options - Blackout Period Tab

Many systems perform nightly backups or system related processing where the Notes server is not available or should not be accessed, and this blackout option will prevent any interruptions.

- This option is enabled by default and is recommended.
- You may change the time frame to accommodate your specific environment.

## Configuring Notifications Preferences

The *Notifications* tab of the Plugin Global Options dialog provides system options for return notification e-mails to the appointment originator (FIG. 6).



**FIG. 6** Plugin Global Options - Notifications Tab

If you select **Do Not Send Appointment Notifications**, the Lotus Notes Appointment Interface will not send any notification e-mails to the appointment originator. Otherwise, the RMS application can deliver this appointment notification message via either Notes or SMTP.

- Notifications routed via Notes are delivered to the originator directly on the Notes server by the *Lotus Notes Appointment Interface* scheduling plug-in.
- Notifications routed via SMTP are not delivered via the *Lotus Notes Appointment Interface* scheduling plug-in, but rather through the standard RMS application e-mail and notification system.
- The internet address of the organizer must be configured in Domino Server to send the notification via SMTP.

After you set all the appropriate plug-in settings, click **OK** to complete the plug-in configuration.

You can return to this configuration at any time using the Configuration Wizard, selecting this plug-in from the list and clicking the **Configure** button.

## Room Scheduling Configuration

For a given room to access a calendar in Notes, 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 will be provided with *Lotus Notes Scheduling Configuration* section.

### Synchronizing the RMS Room With the Lotus Notes Resource Reservations Database

If you wish this RMS room to synchronize with appointment records with that of rooms or resources from the default Lotus Notes resource reservations database as configured in the RMS Lotus Notes Plug-in:

1. Choose **Resource** (FIG. 7):

FIG. 7 Lotus Notes Scheduling Configuration - Schedule Resource

2. Select the resource name in the *Scheduling Resource* drop-down list.

### Synchronizing the RMS Room With a User Mailbox

If you wish this RMS room to synchronize with appointment records from a specific user mailbox:

1. Choose **Mailbox**
2. Select the mailbox name from the *Schedule Mailbox* drop-down list (FIG. 8):.

FIG. 8 Lotus Notes Scheduling Configuration - Schedule Mailbox

After completing the room configuration fields, it is recommended to test the configuration using the **Test** button in the room scheduling plug-in configuration section.

- If the RMS application successfully accesses the provided room resource or mailbox on the provided Notes server, you will be prompted with a success message (FIG. 9).

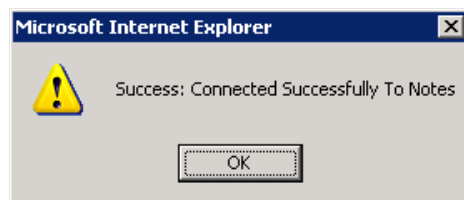
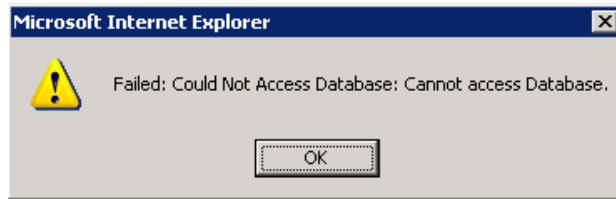


FIG. 9 Test Success

- If a connection to the Notes server was not successfully, a message will be displayed indicating failed access. You may see the following messages (FIG. 10):



**FIG. 10** Test Failure Database

*Failed: Could Not Access resource: Cannot access Resource.*

*Failed: Could Not Access Database: Cannot access Database.*

These errors can be caused because the Notes account for the RMS application does not have access to the selected database.

To configure access to the database, refer to the *Configuring Database Permissions* section on page 13.

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



# Configuring Lotus Notes Mailboxes

## Overview

This information is intended to assist you in configuring Access Control for Notes databases and configuring Notes mailboxes for use with the RMS application.

The Network Administrator should perform this type of configuration.

## Creating a New Notes Mailbox

- Lotus Notes administrators create mailboxes using the Lotus Domino Administrator Tool supplied with Lotus Notes.
- To create a new mailbox in Notes, you must login to a Notes server using the *Lotus Domino Administrator* utility.



You must logon to the Notes server as an existing user with **Administrator** privileges.

1. Begin by starting the *Lotus Domino Administrator* application (located in **Start->Program Files->Lotus Applications**).
2. Open the desired Notes server and click on the **Administration** tab.
3. Select the **People & Groups** tab.
4. Click the **Register** link under *People* on the toolbar on the right side of the screen (FIG. 11).

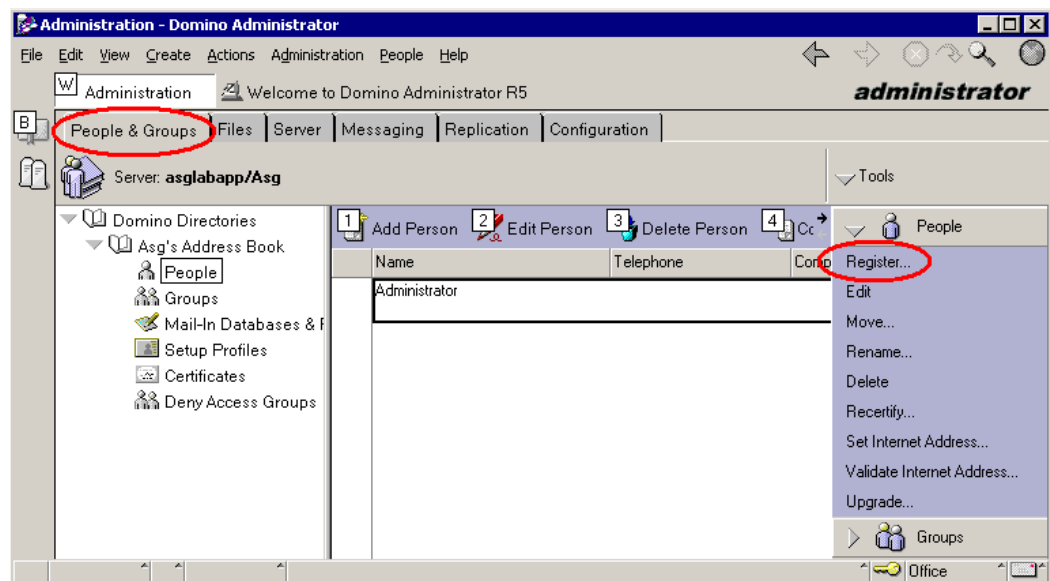
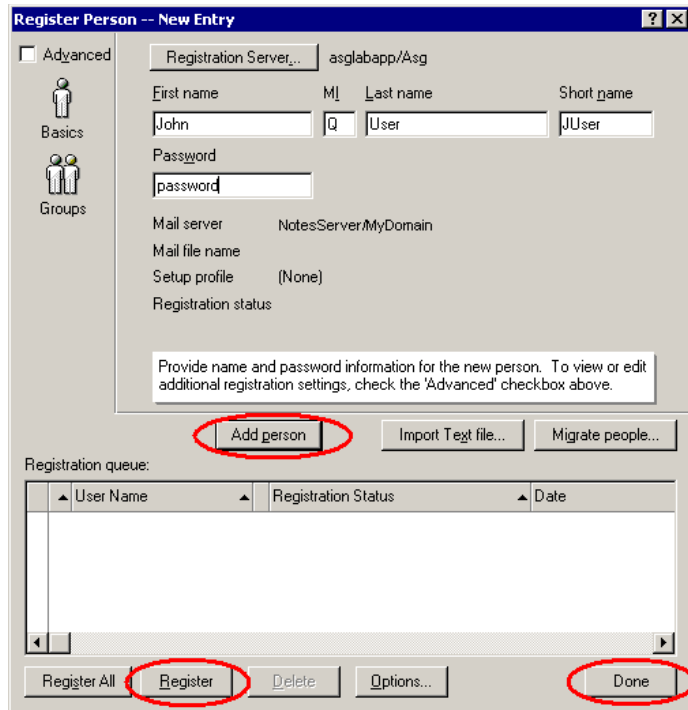


FIG. 11 Domino Admin

This invokes the *Register Person - New Entry* dialog (FIG. 12).



**FIG. 12** Register Person - New Entry dialog

5. Enter the appropriate user name info (*First name, middle initial, and Last name*).
6. In the *Short name* field, enter the user's logon account name,
7. In the *Password* field, enter the user's logon password.
8. **Click Register**
9. **Click Done.**

Continue to the *Configuring Database Permissions* section on page 13.



# Configuring Database Permissions

## Overview

This section will assist in configuring user account access to another Notes database. Notes database permissions are managed using *Access Control*.

To manage Notes database permissions, you must login to a Notes server using the *Lotus Domino Administrator* utility.



NOTE

You must logon to the Notes server as an existing user with **Administrator** privileges.

1. Begin by starting the *Lotus Domino Administrator* application located in the **Start->Program Files->Lotus Applications** folder.
2. Open the desired Notes server and click on the **Administration** Tab.
3. Select the **Files** tab (FIG. 13).

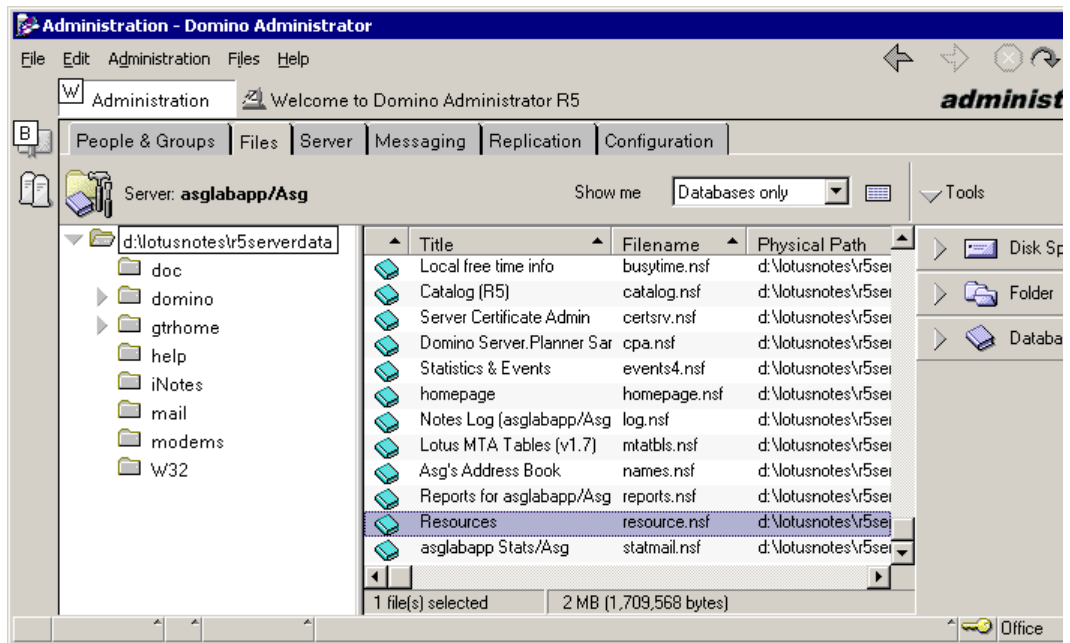


FIG. 13 Lotus Domino Administrator (Files tab)

4. Select the database on which you wish to configure permissions.
5. Right-click the database and select **Access Control->Manage** from the context menu (FIG. 14).

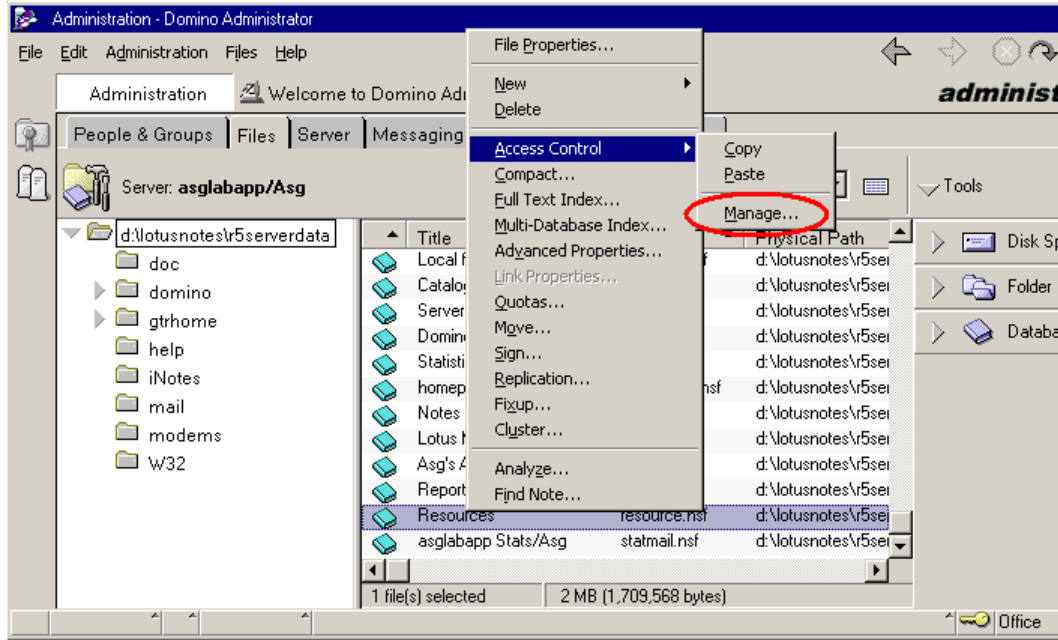


FIG. 14 Lotus Domino Administrator (Files tab) - Access Control > Manage

This invokes the *Access Control List* dialog (FIG. 15).

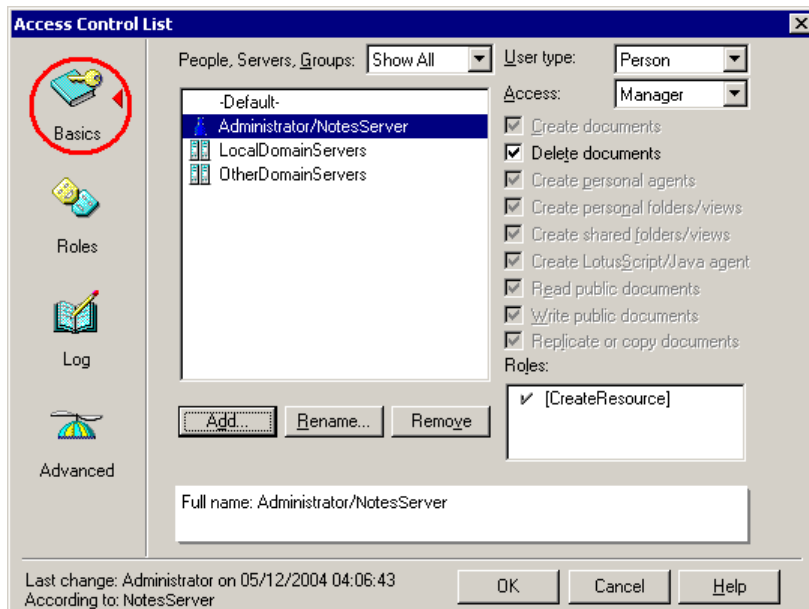


FIG. 15 Access Control List dialog

6. In the *Access Control List* dialog, select the **Basics** tab.
7. Click **Add**. This invokes the *Names* dialog (FIG. 16).

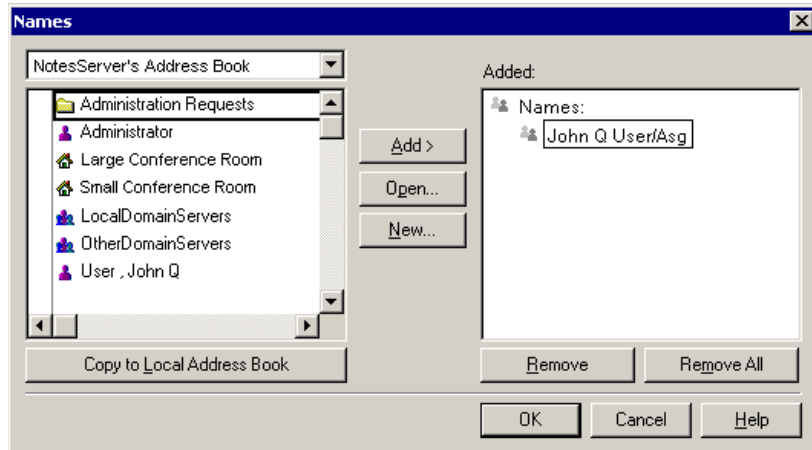


FIG. 16 Names dialog

8. In the *Names* dialog, enter a user name or click the **Address book** icon to select from a list of addresses, and click **OK** to save your settings and close this dialog.
9. At a minimum, enable **Read Public Documents** (in the *Access Control List* dialog) for the selected user (FIG. 17).

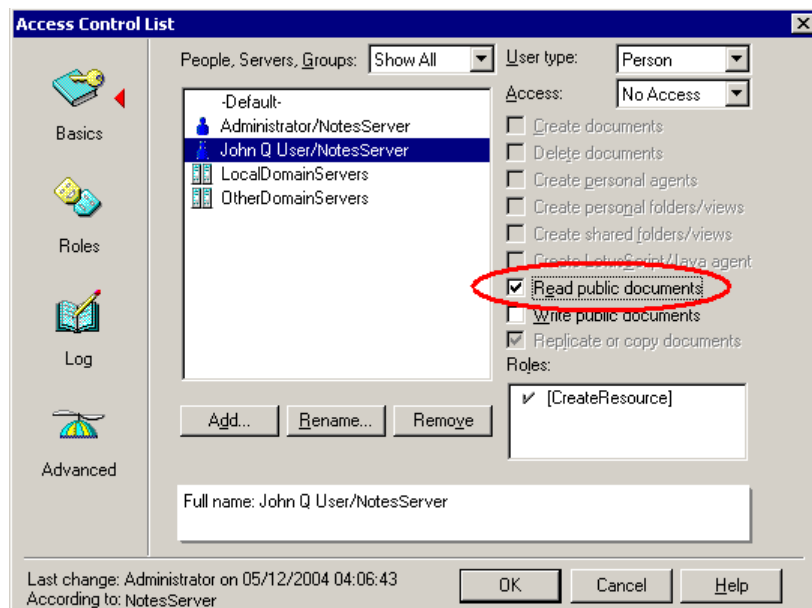


FIG. 17 Access Control List dialog - Read Public Documents selected

**10. Click OK.**

The example shown in FIG. 17 grants user "John Q User" read access to Resource Reservations database.

- The Lotus Notes client installed on the RMS application server should be configured to logon using the "John Q User" user account.
- A room in the RMS application could be configured to access the "John Q User" mailbox or a resource from the Resource Reservations database since the "John Q User" account now possesses access permissions to both.



# Known Issues

1. Recurring reservation instances in Lotus Notes are handled as individual appointment reservations in RMS.
2. When recurring event reservation instances are modified in Lotus Notes, Lotus Notes may create new appointment instances with new unique identifiers.  
Upon synchronization, RMS internally creates new reservation booking records with new events reservation identifiers, thus RMS may detect these as new event reservations and delete the previous event reservations from the RMS database. Consequently, this also may delete any RMS associated data configured on the previous event reservation record.
3. If the Lotus Notes client is open and running on the RMS server while the RMS Lotus Notes plug-in attempts to communicate with the Domino server, this can sometimes cause the Lotus Notes communication to stop working and the RMS Scheduling Manager service must be restarted.  
It is recommended that the Lotus Notes client software is not running on the RMS server at the same time the RMS services are running.
4. In some cases you may receive the following error when connecting to the Notes server using the RMS Configuration Wizard and/or during a synchronization cycle:  
*"Notes error: Could not open the ID file."*  
If this happens the "AMX RMS Scheduling Manager" Windows service must be configured to log on with a Windows account that has the notes.ini and user.id files in its application directory on the RMS server.







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