INSTALLATION MANUAL

RMS-SCH-LN

RMS ENTERPRISE INTERFACE FOR LOTUS NOTES® DOMINO

AV FOR AN IT WORLD

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RMS Enterprise Interface for Lotus Notes Domino (RMS-SCH-LN)

Overview

RMS Enterprise Scheduler provides ad-hoc bookings and assists attendees in locating meeting rooms by displaying the scheduled appointments on a touch screen in the meeting room and adjacent to room entrances. It also provides automation capabilities for event start and end times. The RMS Enterprise Interface for Lotus Notes Domino (RMS-SCH-LN) provides access to multiple Notes resources. This variety of connection options provides a robust and flexible solution for attaching RMS application rooms to IBM Lotus Notes® calendars.

If you are using the scheduling features of RMS Enterprise, and you will be using RMS 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, RMS-SCH-LN 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 Domino Interface must have access to the Notes 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 to access the Resource Reservation database from which the schedule information will be read. See the *Configuring Lotus Notes Mailboxes* on page 11 for more details on configuring Notes.

NOTE: *RMS-SCH-LN is intended for use with RMS version 4.1 (or higher).*

Lotus Notes Server Requirements

Lotus Notes 8.5.3 FP4

Pre-Installation Checklist

Before installing the RMS Enterprise Interface for Lotus Notes Domino, review the following checklist to verify that these basic system requirements are met:

- Verify that the *RMS Enterprise Scheduling Troller Window Service* (required for all scheduling interfaces). and the *Lotus Notes Client* are installed on the same machine. The RMS Enterprise Scheduling Troller Window Service and the Lotus Domino server should be on the same time zone. Refer to the *Adding the RMS Scheduling Interface* section on page 19 for details.
- Verify that the PC on which the Scheduling Interface and Plug-In will be installed has .NET 4.0® (or higher) installed. If version 4 of .NET is not detected, the Plug-In installation program will prompt you to exit the installation. Refer to the *Plugin Installation and Configuration* section on page 23 for details.

Installation and Configuration Steps - Overview

1. **Create a new Lotus Notes Room Mailbox:** Lotus Notes Domino provides support for mailboxes that are used to manage meeting room schedules. To create a new mailbox in Notes, you must login to a Notes server using the *Lotus Domino Administrator* utility. See the *Configuring a Room Mailbox (Notes)* section on page 6 for details.
2. **Configure Lotus Notes Database Permissions:** Refer to the *Configuring Lotus Notes Database Permissions* section on page 8 for details on using *Access Control to* configure user account access to another Notes database.
3. **Configure the Reservations Database View and Soft Delete**: The recommended method for fetching meeting documents from the the Lotus Domino server is via Domino's *Resource database views*. Also, RMS uses *soft-deletions* to know which bookings have been deleted. Refer to the *Configuring Reservation Database Views and Soft Deletion* section on page 12 for details.
4. **Install the RMS scheduling Interface (if necessary):** In order to add the Scheduling Interface (required to use any Scheduling Plug-Ins) to your RMS Enterprise system, it is necessary to upgrade your RMS Entitlement with a Scheduling License. The Scheduling License enables support for various scheduling plug-ins for RMS Enterprise. Refer to the *Adding the RMS Scheduling Interface* section on page 19 for details.
5. **Install and configure the Lotus Notes scheduling plug-in:** Refer to the *Plugin Installation and Configuration* on page 23 for details.
6. **Configure the RMS Service account:** Refer to the *Configuring the RMS Service Account (Notes)* on page 30 for details on configuring access to Notes Room Mailboxes for the RMS Service account.

Upgrading the RMS Scheduling Interface

To upgrade from a previous version of the RMS Scheduling Interface, follow the instruction for installing the current version (see the *Adding the RMS Scheduling Interface* section on page 19 for details). The installation process removes the previous version before installing the new version.

After installing the update, it is necessary to re-configure access to Notes Room Mailboxes for the RMS Service account. Refer to the *Configuring the RMS Service Account (Notes)* on page 30 for details

Upgrading the Scheduling Plug-In

To upgrade from a previous version of the Scheduling Plug-In, follow the instruction for installing the current version (see the *Installing the Lotus Notes Scheduling Plugin* section on page 23). The installation process removes the previous version before installing the new version.

Configuring a Room Mailbox (Notes)

Overview

Lotus Notes Domino provides support for mailboxes that are used to manage meeting room schedules. The instructions in this section describe how to configure a new Notes Room Mailbox.

NOTE: *Appropriate administrator access is required to perform these tasks.*

Creating a New Notes Room Mailbox

To create a new mailbox in Notes, you must login to a Notes server using the *Lotus Domino® Administrator* utility.

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. 1).

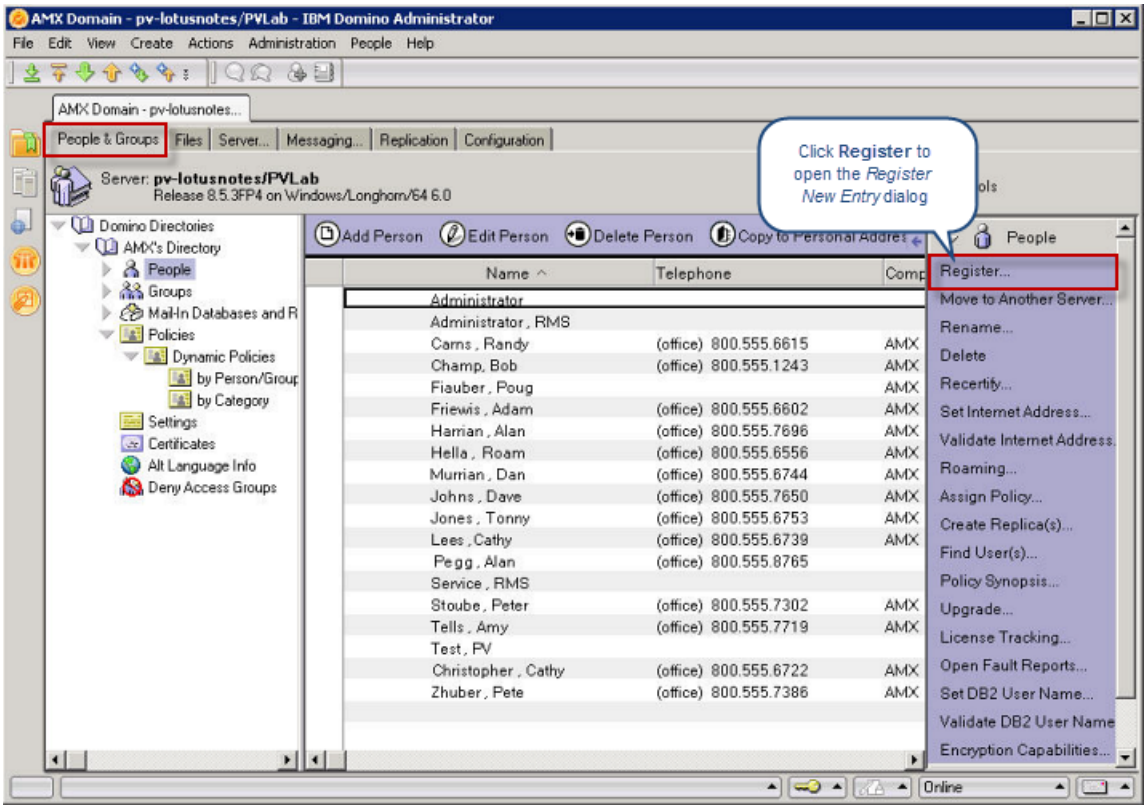

FIG. 1 Domino Administrator

This invokes the *Register Person - New Entry* dialog (FIG. 2).

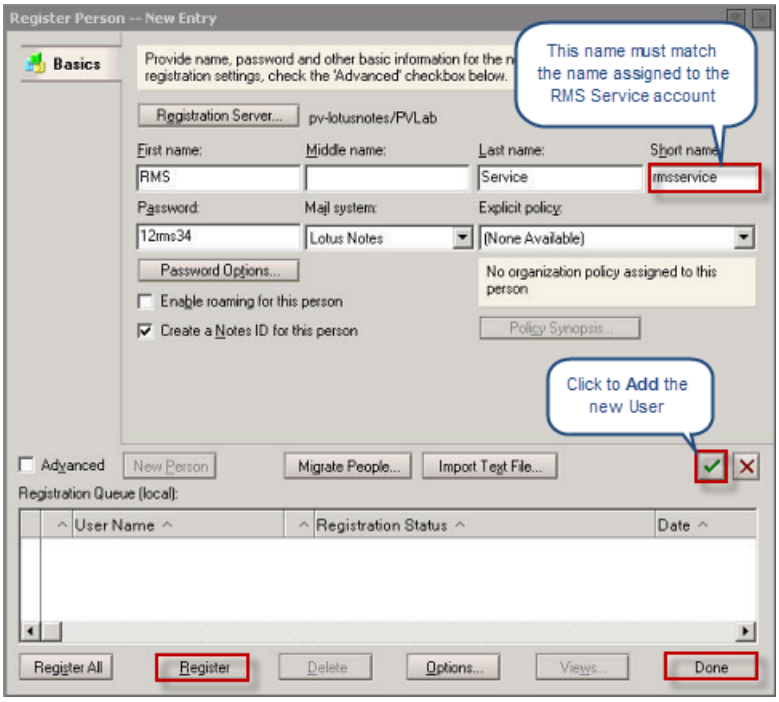

FIG. 2 Register Person - New Entry dialog

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 the green checkmark icon to add the new user.
9. Click **Register**.
10. Click **Done**.

Continue to the *Configuring Lotus Notes Database Permissions* section on page 8.

Configuring Lotus Notes Database Permissions

Overview

This section describes 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. Start 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 **Files** tab (FIG. 3).

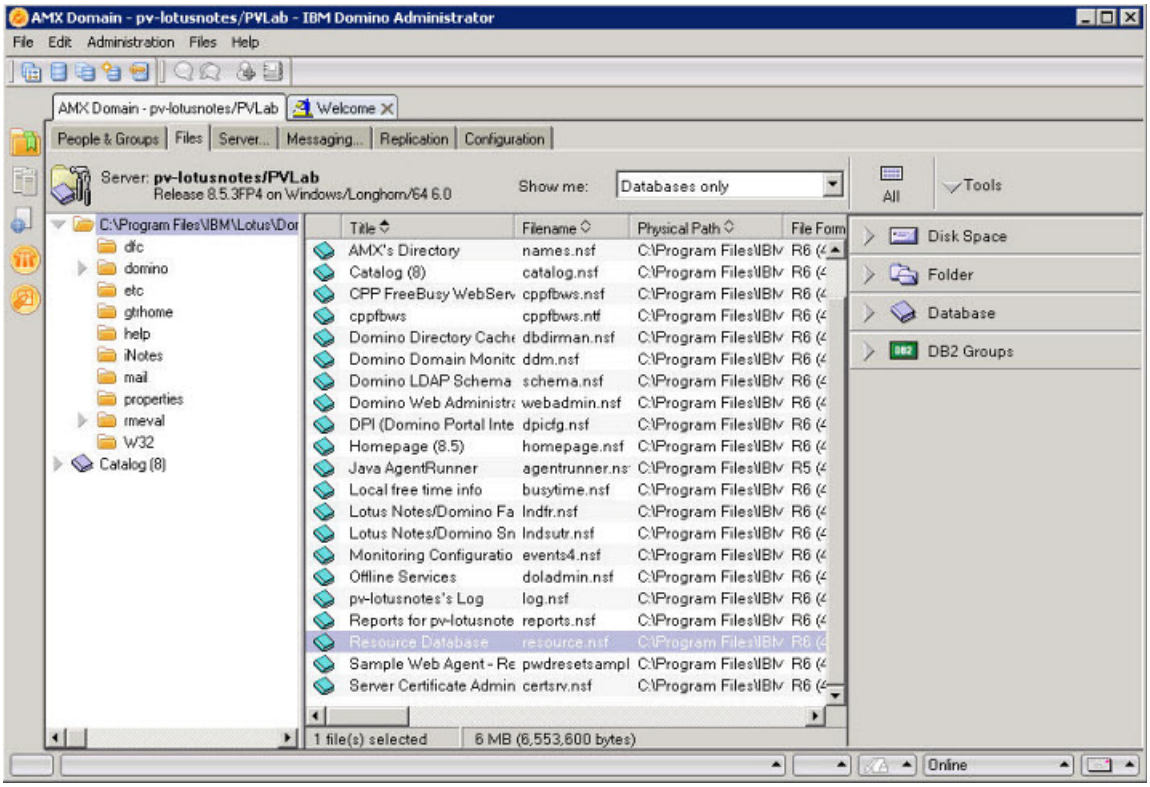

FIG. 3 Lotus Domino Administrator (Files tab)

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

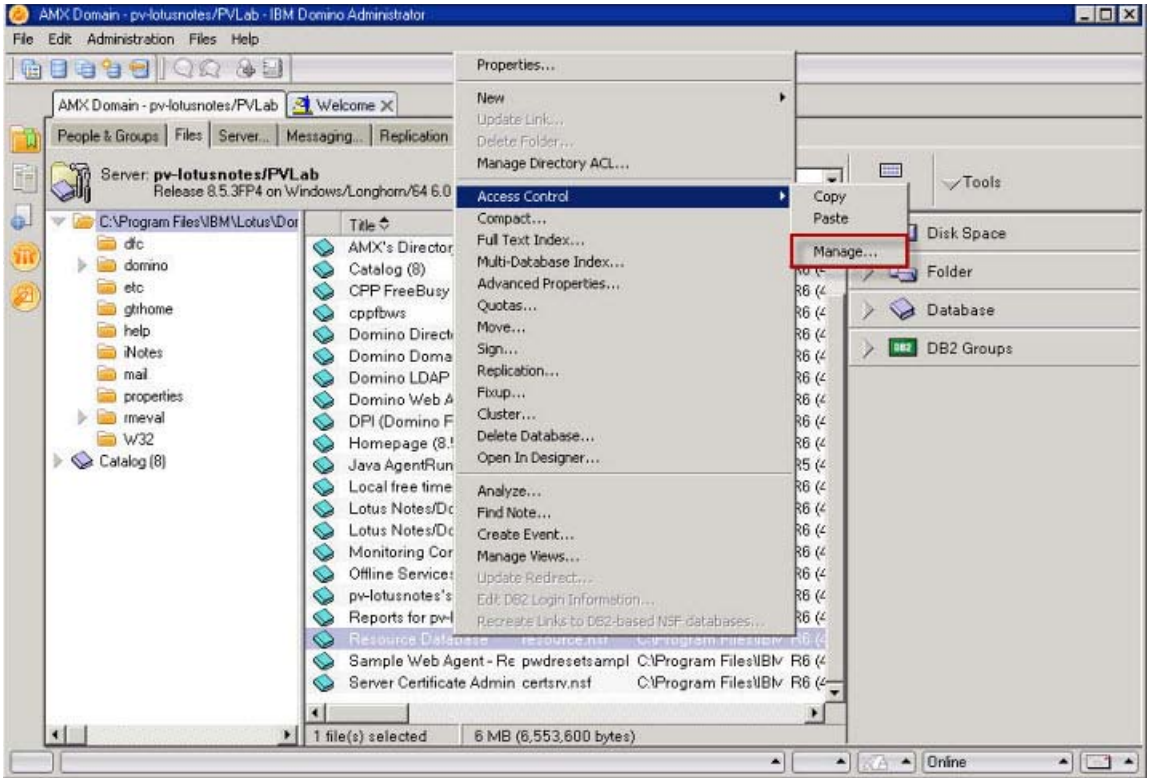

FIG. 4 Lotus Domino Administrator (Files tab) - Access Control > Manage

This invokes the *Access Control List* dialog.

5. In the *Access Control List* dialog, select the **Basics** tab (FIG. 5). .

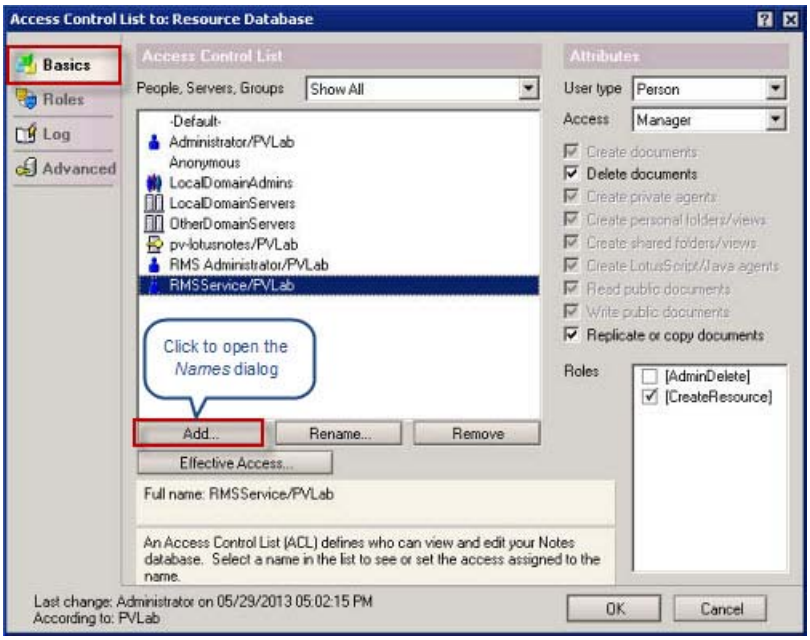

FIG. 5 Access Control List dialog

6. Click **Add**. This invokes the *Add User* dialog (FIG. 6):

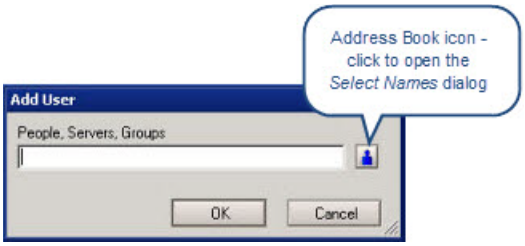

FIG. 6 Add User dialog

7. In the *Select Names* dialog, navigate the *Directories* list (on the left side of the dialog) and locate the Name associated with the user that represents the RMS Troller Service (for example, "RMS Service"), (FIG. 7):

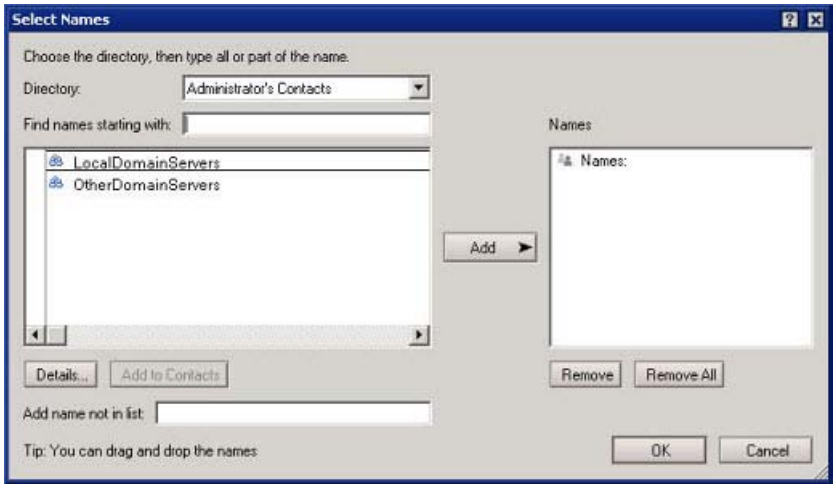

FIG. 7 Select Names dialog

8. Click **Add** to add the selection to the *Names* window (FIG. 8):

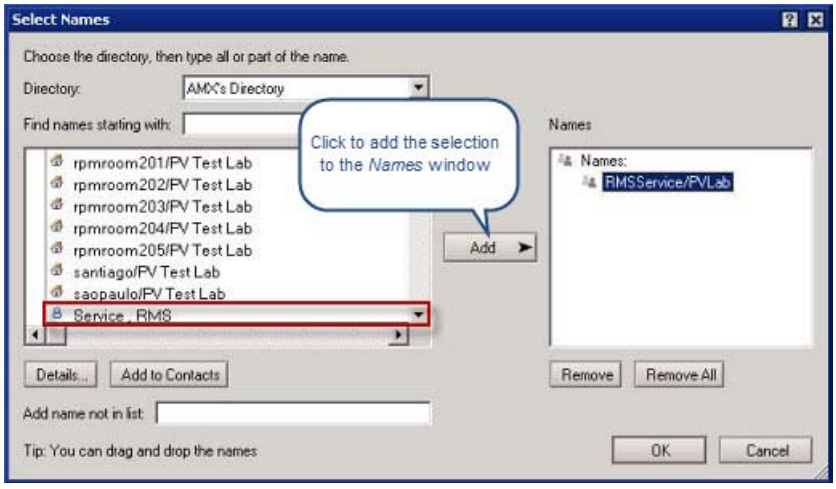

FIG. 8 Select Names dialog, with Directory and Name selected

9. Click **OK** to save your settings and close the *Select Names* dialog.
10. Click **OK** to close the *Add User* dialog. This returns you to the *Access Control List* dialog (*Basics* tab).
11. Note that the *Access Control List* dialog indicates the selected Directory and Name in the *Access Control List* window (FIG. 9):

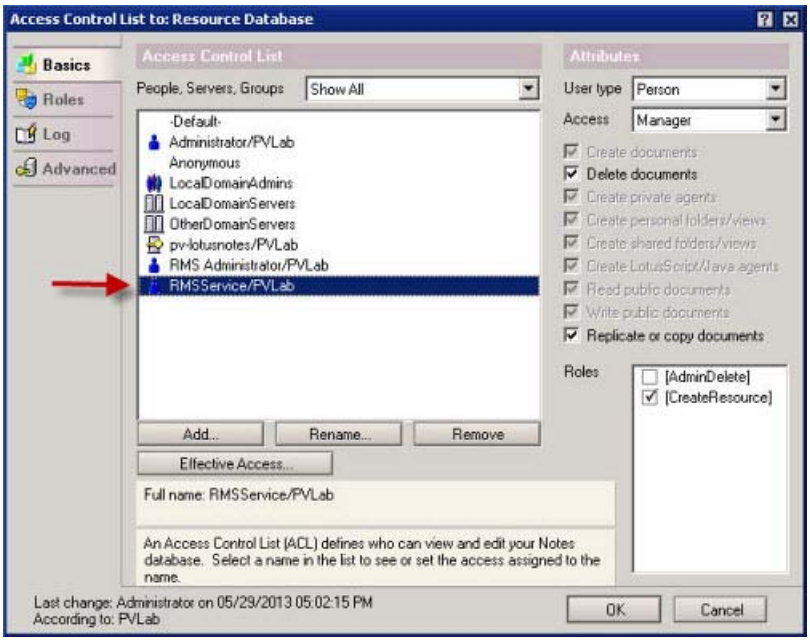

FIG. 9 Access Control List dialog - updated with added Name

12. Under Attributes, select **Manager** from the drop-down menu.
13. Verify that the *Read Public Documents* option is enabled.
14. Click **OK** to save changes and close this dialog.

The example shown in FIG. 9 grants user "**RMS Service/PVLab**" read access to Resource Reservations database.

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

Configuring Reservation Database Views and Soft Deletion

Overview

The recommended method for fetching meeting documents from the the Lotus Domino server is via Domino's Resource database views (see the *Document Selections* section on page 6 for details). This method ensures optimal performance.

Since the RMS plug-in uses the *FTSearch API* (i.e. full-text search) which requires full-text indexing on the Resource Database, the Domino Reservation database needs to be indexed in order to use the *Document Search Through View* option.

Lotus Domino Configuration Changes

The following sections describe the configuration changes required for a Lotus Domino server to accommodate the RMS Lotus Notes Scheduling Plug-In when being used in View-mode.

Full-Text Indexing

The RMS plug-in uses the *FTSearch API* (i.e. full-text search) which requires full-text indexing on the Resource Database. To enable full-text indexing:

1. In Lotus Domino Administrator, right-click on *Resource Database* and choose **Properties** from the context menu (FIG. 10):

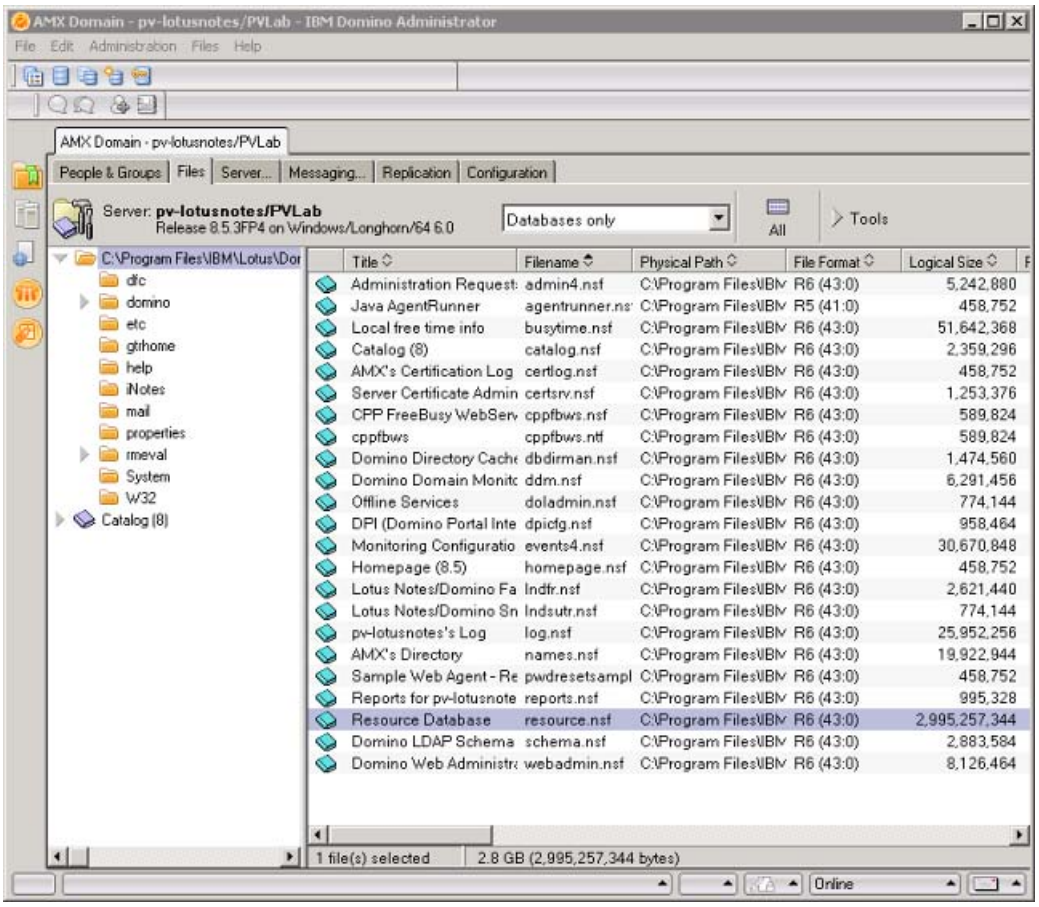

FIG. 10 Lotus Domino Administrator - Resource Database selected

2. This selection opens the tabbed *Resource Database Properties* dialog.
3. In the *Search* tab (the magnifying glass icon), click **Create Index** to create a full-text index (FIG. 11):

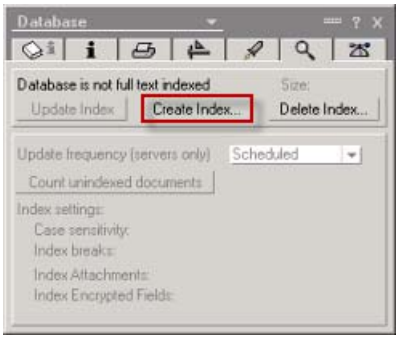

FIG. 11 Resource Database Properties dialog (Search tab) - Create Index

4. Set the *Update Frequency* to **Immediate** (FIG. 12):

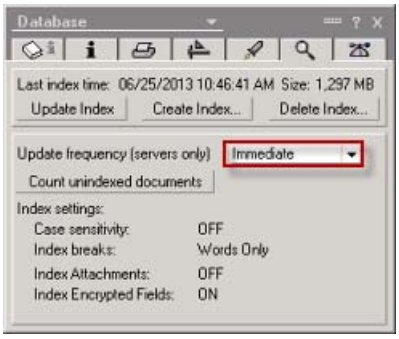

FIG. 12 Resource Database Properties dialog (Search tab) - Update Frequency = Immediate

NOTE: *Allow approximately 15 minutes to create the index the first time, depending on the size of the resource database.*

Soft Deletions

By default, when a document is deleted from a Lotus Notes database, it is gone. However, RMS uses *soft-deletions* to know which bookings have been deleted. To enable soft deletions:

1. In the *Resource Database Properties* dialog, click on the Advanced tab (the last one) and click **Allow soft deletions** (FIG. 13):

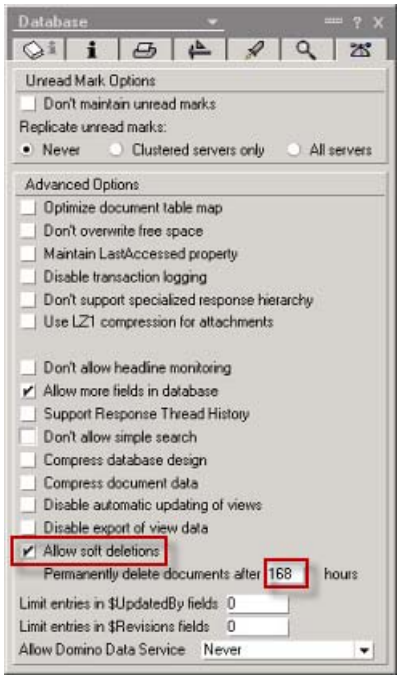

FIG. 13 Resource Database Properties dialog (Search tab) - Update Frequency = Immediate

2. Set the **Permanently delete documents after <*x*> hours** field. The example in FIG. 13 shows this value set to **168** hours (one week). In this case, if the troller did not run for up to a week, it could still know about all the deletions that had occurred during that time.

Creating a New View for Soft Deletions

Since there isn't a default view showing soft-deletions with the default resource database, you must create one and name it "*DeletedReservations*":

1. In the Lotus Domino Designer tool, open the resource database.
2. Right-click on the resource database and choose **New > View** to open the *Create View* dialog (FIG. 14):

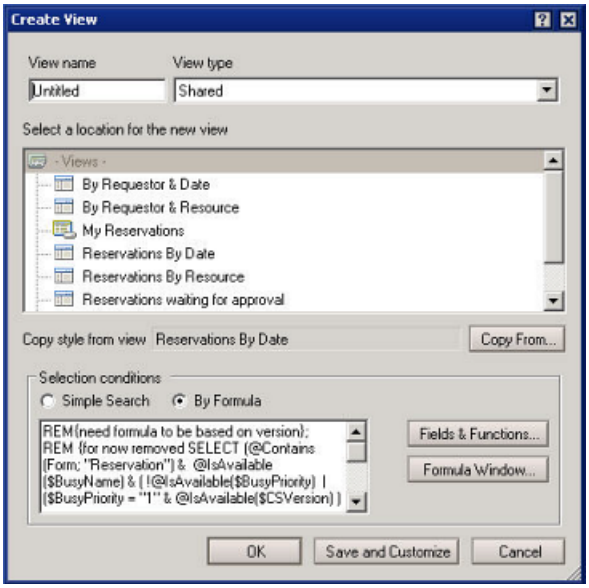

FIG. 14 Create View dialog

3. In the *View name* field, enter the name **DeletedReservations**; and in the *View type* drop-down, select **Shared, contains deleted documents** (FIG. 15):

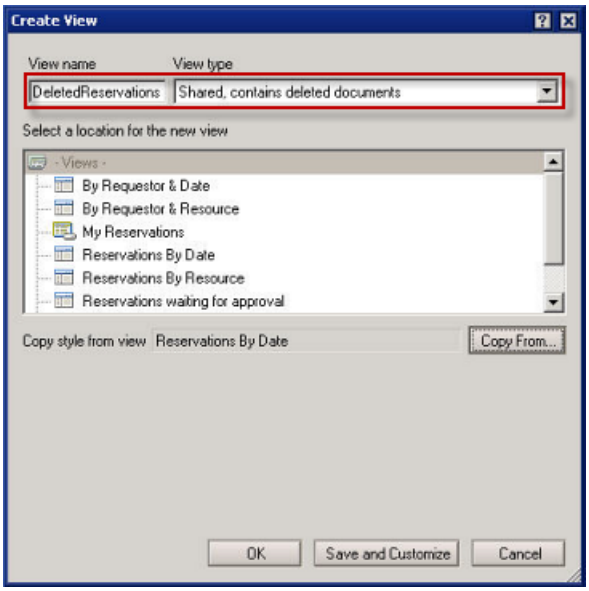

FIG. 15 Create View dialog: View name = DeletedReservations

4. Click **Copy From** to open the *Copy Style From* dialog, and select the *Reservations By Resource* view to pattern the style after. (FIG. 16):

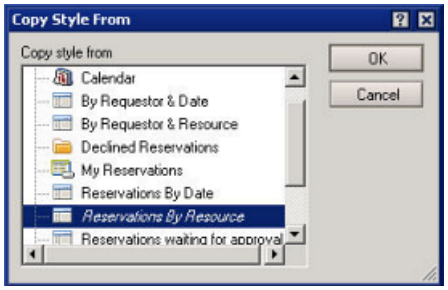

FIG. 16 Copy Style From dialog - Reservations By Resource selected

Click **OK** to save changes and close this dialog, and return to the *Create View* dialog (FIG. 17):

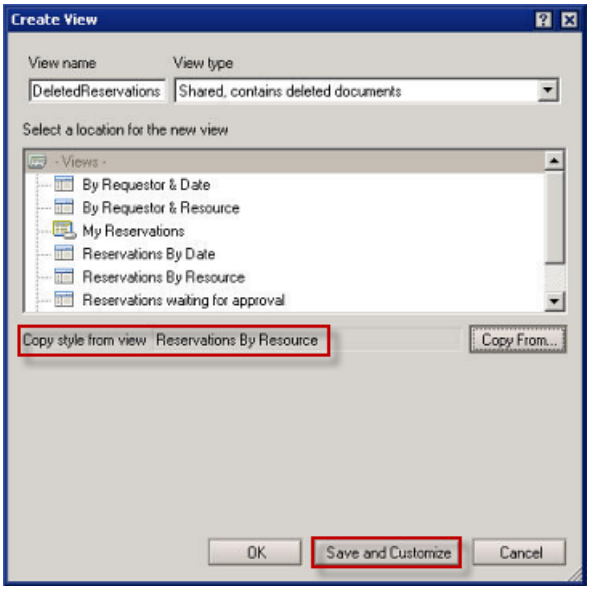

FIG. 17 Create View dialog: View name = DeletedReservations

5. Click **Save and Customize** to open the *DeletedReservations View* dialog (FIG. 18).

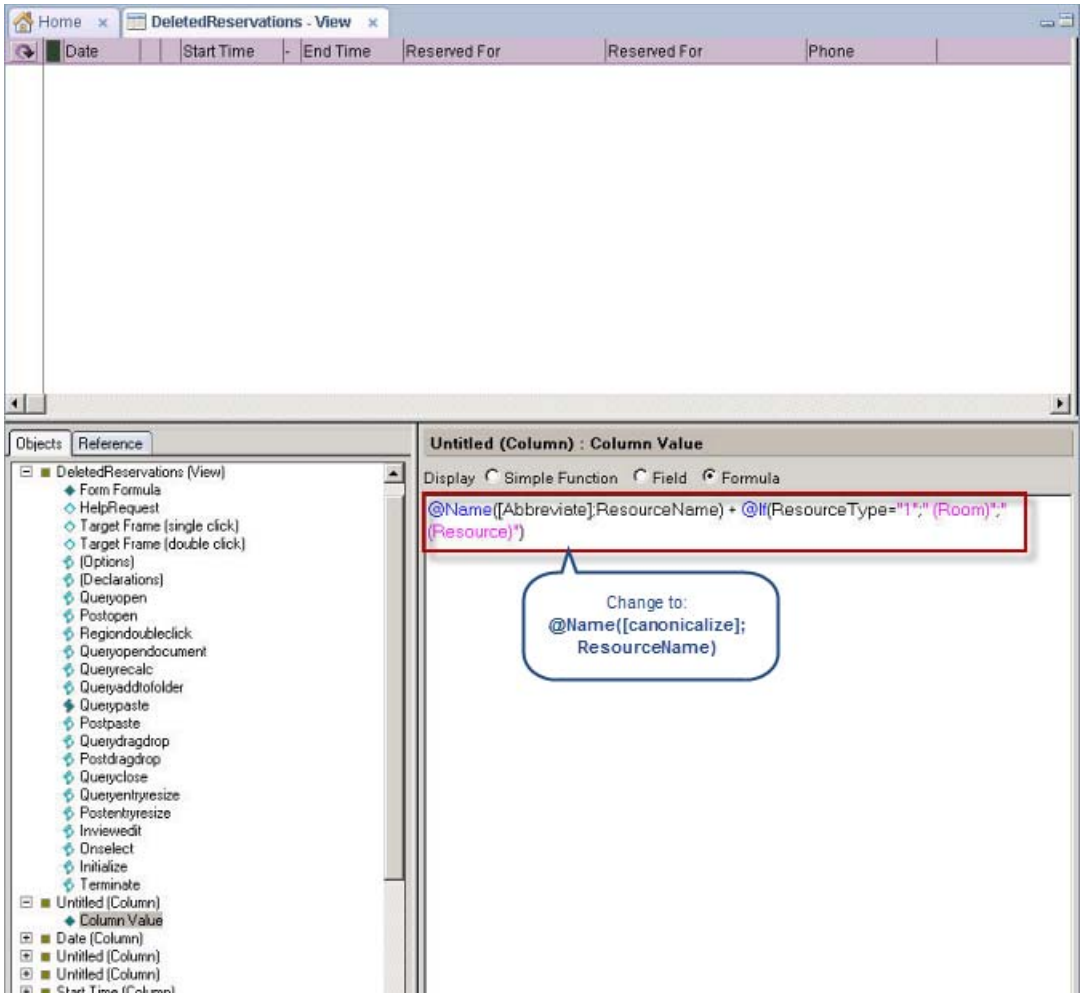

FIG. 18 "DeletedReservations" View dialog

6. In the *Untitled (Column): Column Value* window (lower-right), edit the formula (which should be the resource name) from what is shown in FIG. 18 and change it to:

   @Name([Canonicalize];ResourceName)

7. In the top window of the dialog, click on the header of the *Date* column, and select **Delete** from the context menu (FIG. 19):

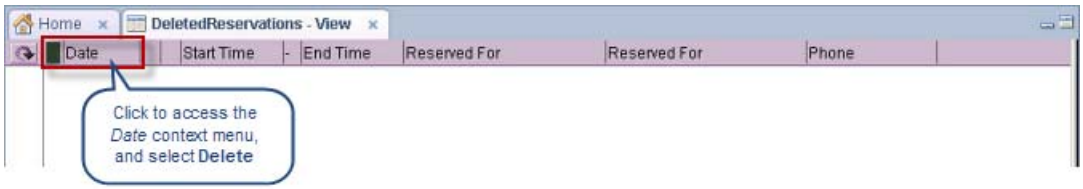

FIG. 19 Accessing the "Date" context menu

   Note that as a result of this action, the **Date [column]** entry is removed from the *Objects* tab.

8. In the *Applications* window, select *Resource Database* > *Views*, and scroll down to **DeletedReservations** (FIG. 20):

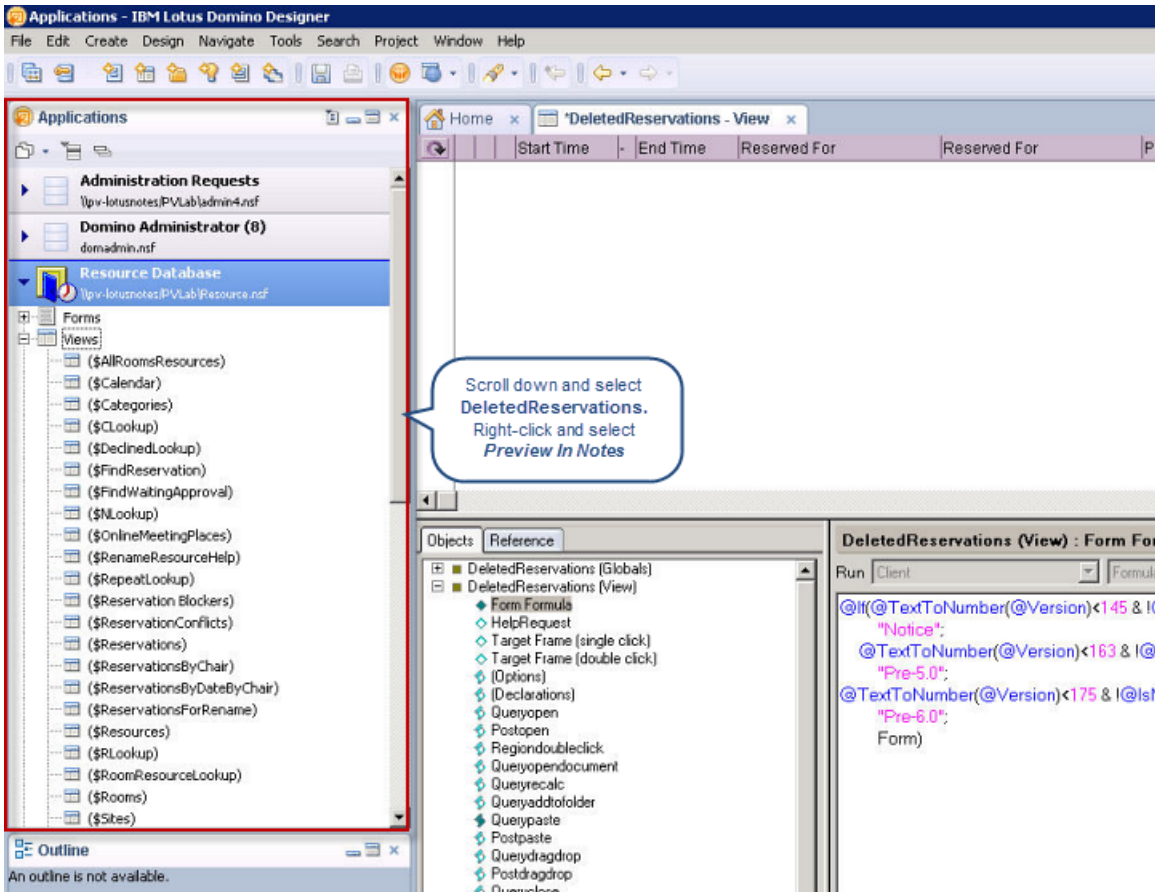

FIG. 20 Applications > Resource Database > DeletedReservations

9. Right-click on *DeletedReservations*, and select **Preview In Notes** from the context menu (FIG. 21):

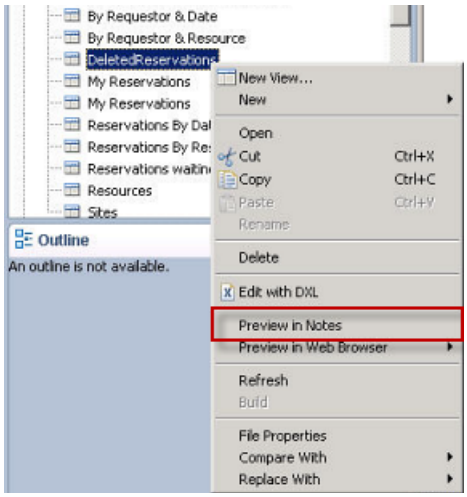

FIG. 21 DeletedReservations > Preview In Notes

The preview should look similar to FIG. 22:

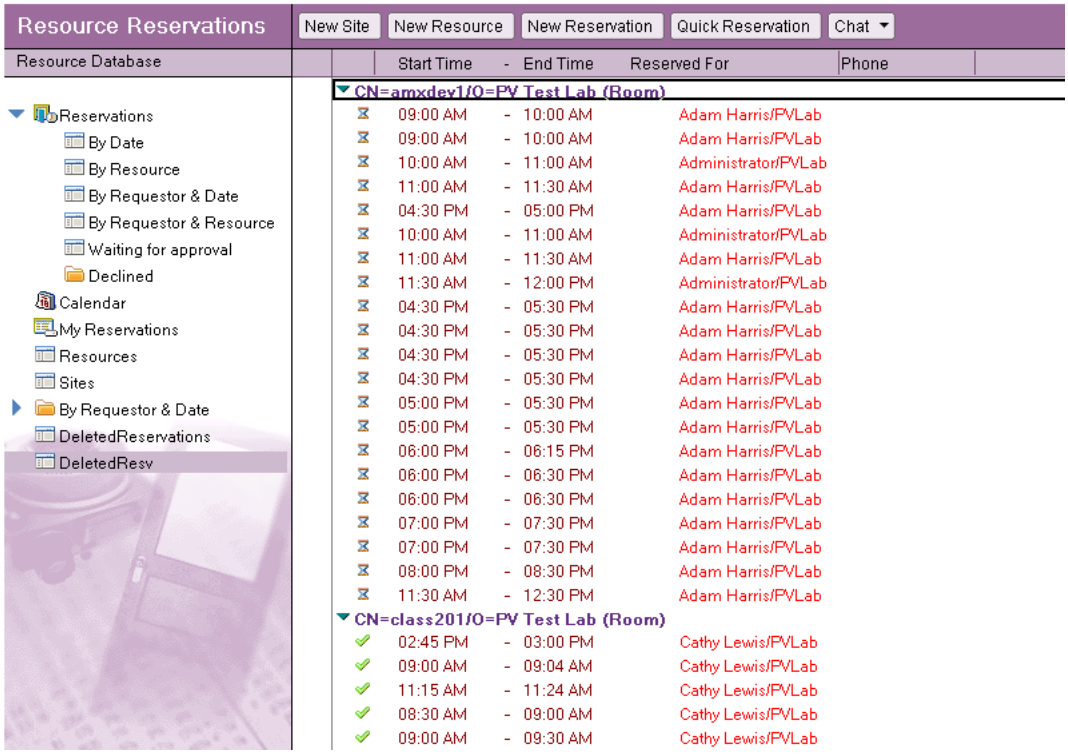

FIG. 22 DeletedReservations view (Previewed in Notes)

Adding the RMS Scheduling Interface

Overview

In order to add the Scheduling Interface (required to use any Scheduling Plug-Ins) to your RMS Enterprise system, it is necessary to upgrade your RMS Entitlement with a *Scheduling License*. The Scheduling License enables support for various scheduling plug-ins for RMS Enterprise.

This section describes upgrading your RMS Entitlement with a *Scheduling License*. The Scheduling License enables support for various scheduling plug-ins for RMS Enterprise.

NOTE: *To ensure optimal performance of the RMS Enterprise UI, the RMS Scheduling Interface application should not be installed on the Primary RMS Enterprise Server. Install the RMS Scheduling Interface application on a separate server.*

Verify that the server that will run the RMS Enterprise Scheduling Interface meets or exceeds the minimum OS and hardware requirements indicated below.

Scheduling Server Recommendations

Verify that each server that will run the RMS Enterprise Scheduling Interface meets or exceeds the following minimum requirements (check the appropriate boxes below):

Scheduling Server Hardware Recommendations			
Does your Scheduling server meet the following Minimum Hardware Recommendations?		**Yes**	**No**
• Processor	Dual core Intel Xeon® processor @ 2.67GHz (or equivalent)		
• Memory	4 GB		
• Display	1280 x 1024 resolution		
• Hard Disk	1 GB available space for RMS Enterprise Scheduling application files.		
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 Enterprise.		

For installations with more than 50 locations that use the Scheduling Interface, a separate server from the RMS Application is required.

Scheduling Interface Operating System			
Do you have a compatible Microsoft® Server OS installed?		**Yes**	**No**
Supported Microsoft Server Operating Systems: • Microsoft Windows Server 2012 Standard Edition *Note: When using Windows Server 2012, the administrator must install NET 4.0 or higher (required by the AMX License Tool).* • Microsoft Windows Server 2008 R2 (x64): Web Edition / Standard Edition / Enterprise Edition • Microsoft Windows Server 2008 SP2 (x86 and x64): Web Edition / Standard Edition / Enterprise Edition			
Yes	Please continue to the next step.		
No	You must obtain a compatible server OS to install RMS.		
Do you have an administrative account to the server where RMS will be installed?		**Yes**	**No**
Note: RMS is a system level application and requires administrative access to install and configure RMS, including the Scheduling Interface and Scheduling Configuration Tool .			
Yes	Please continue to the next step.		
No	You must obtain an administrative logon account, or logon to the server with a user account that has administrative access to the server.		

Before You Start

- Verify that the Primary RMS Server is running.
- Have the IP Address and login credentials for the RMS Enterprise Server.
- Have the IP Address and login credentials for the scheduling interface.

Install the Scheduling Interface and Configuration Tool

The first step in adding a Scheduling License to RMS Enterprise is to install the *RMS Scheduling Interface* application and *RMS Scheduling Configuration Tool*:

1. Download the RMS Enterprise Scheduling installation file (**ResourceManagementSuiteScheduler.msi)** from www.amx.com/rms/.
2. Double-click to launch the *AMX RMS Scheduling Setup Wizard* (FIG. 23):

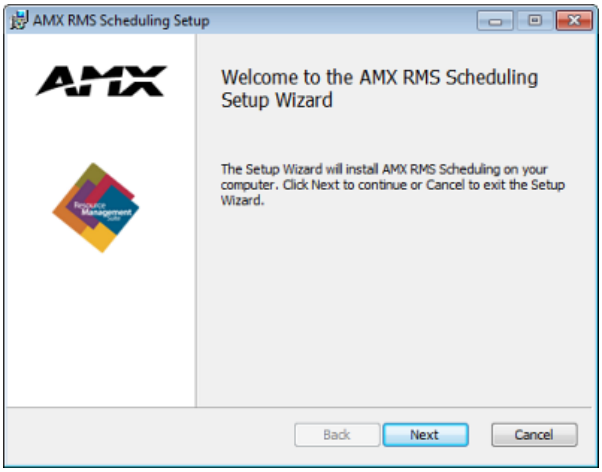

FIG. 23 AMX RMS Scheduling Setup Wizard (Welcome screen)

3. Click **Next** to proceed to the *End-User License Agreement* screen (FIG. 24):

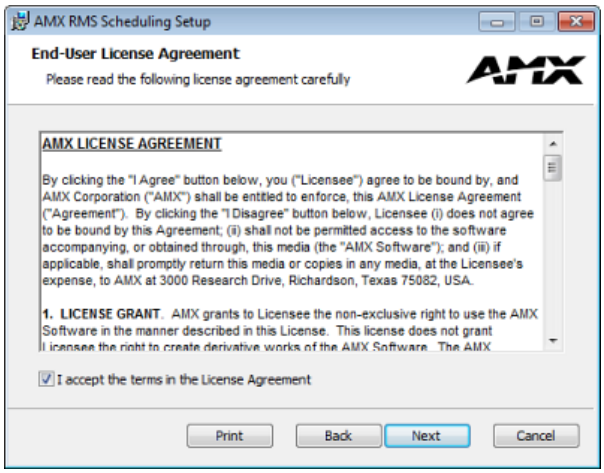

FIG. 24 AMX RMS Scheduling Setup Wizard - End User License Agreement

4. Click *I accept the terms in the License Agreement* to enable the *Next* button, then click **Next** to proceed to the *Destination Folder* screen (FIG. 25):

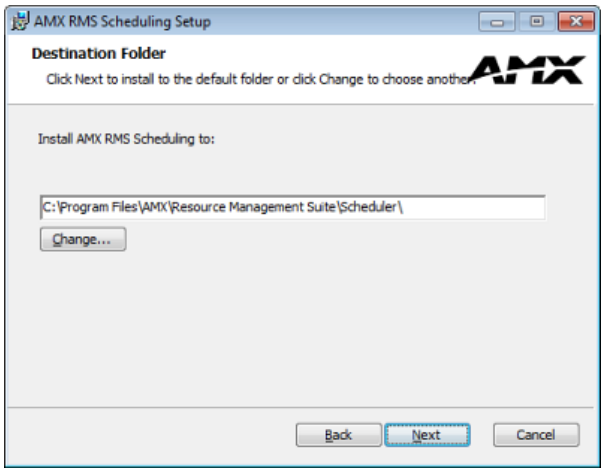

FIG. 25 AMX RMS Scheduling Setup Wizard - Destination Folder

The default target directory for the Interface installation is indicated in the text field on this screen:

- 32-bit OS: **C:\Program Files\AMX\Resource Management Suite\Scheduler**
- 64-bit OS: **C:\Program Files (x86)\AMX\Resource Management Suite\Scheduler**

In most cases you should use this default setting. However, if your installation requires a different folder, click **Change** and select the desired folder in the *Change Destination Folder* screen.

5. Click **Next** to proceed to the *Ready To Install AMX RMS Scheduling* screen (FIG. 26):

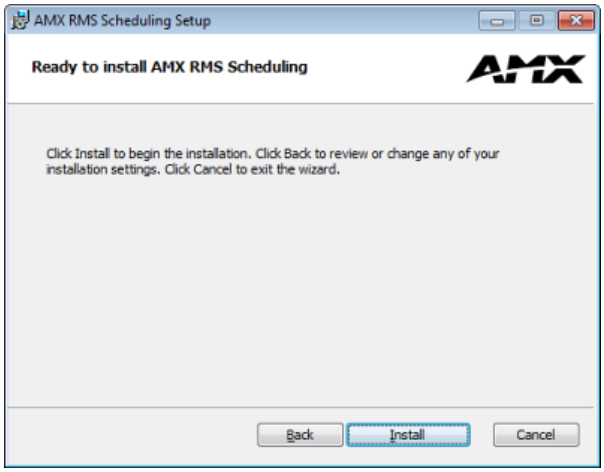

FIG. 26 AMX RMS Scheduling Setup Wizard - Ready To Install AMX RMS Scheduling

6. Click **Install** to begin installing AMX RMS Scheduling to the target directory on the specified server. Installation progress is indicated in the *Installing AMX RMS Scheduling* screen (FIG. 27):

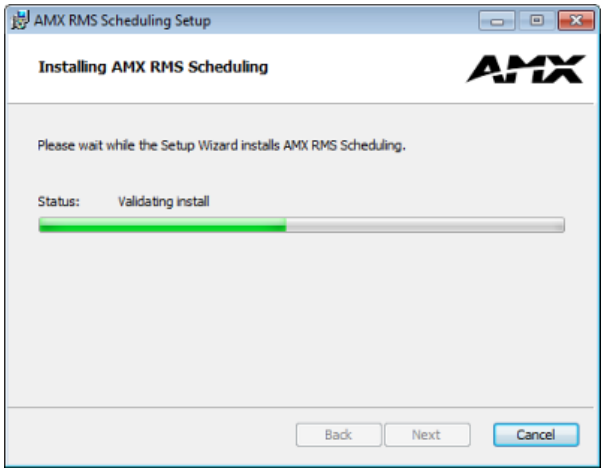

FIG. 27 AMX RMS Scheduling Setup Wizard - Installing AMX RMS Scheduling

7. When the installation is complete, the *Completed the AMX RMS Scheduling Setup Wizard* screen is displayed (FIG. 28):

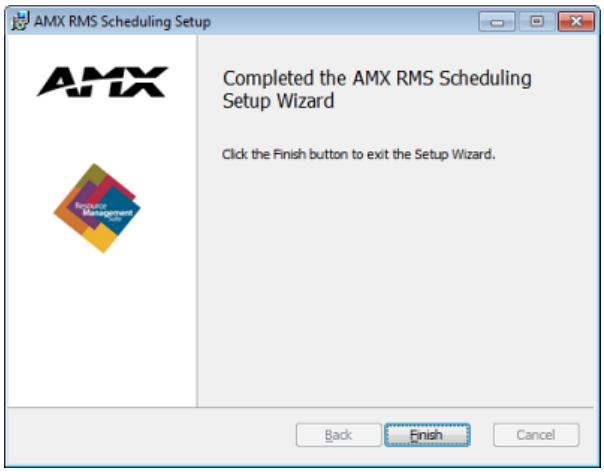

FIG. 28 AMX RMS Scheduling Setup Wizard - Completed the AMX RMS Scheduling Setup Wizard

8. Click **Finish** to close the *AMX RMS Scheduling Setup Wizard*.

At this point, the *Scheduling Interface* and *Scheduling Configuration Tool* are both installed.

Plugin Installation and Configuration

Overview

To use the *RMS Enterprise Interface for Lotus Notes Domino,* it must first be registered.

- Only a single scheduling plug-in should be registered at one time.
- The RMS Interface for Lotus Notes Domino communicates with a single Lotus Notes Server.

NOTE: *The RMS application must be configured for External Scheduling Systems for the scheduling plug-in configuration dialog to be displayed. See the Adding the RMS Scheduling Interface* section on page 19 *for details.*

Installing the Lotus Notes Scheduling Plugin

1. Launch the installation file: **RMSLotusNotesPlugin.exe**. The first dialog to display is the *Welcome* screen (FIG. 29):

FIG. 29 Welcome to RMS Lotus Notes Domino Plug In Setup dialog

2. Read the *Welcome* text, and click **Next** to proceed.
   - If the program detects that the RMS Enterprise Scheduling Interface is not present on this PC, you will be prompted to exit and install the Scheduling Interface (FIG. 30).

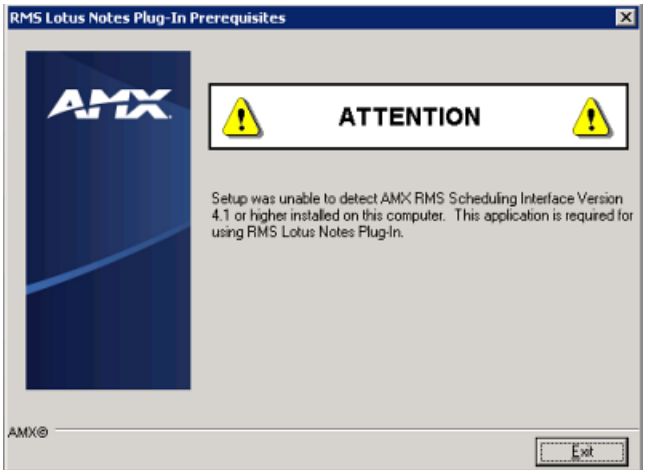

FIG. 30 RMS Lotus Notes Domino Plugin Prerequisites dialog

In addition to RMS Enterprise, the *RMS Scheduling Interface* application and *RMS Scheduling Configuration Tool* are required to install a scheduling plug-in. Refer to *Adding the RMS Scheduling Interface* section on page 19 for installation instructions.

- If version 4 of .NET is not detected, the installation program will prompt you to exit the installation (FIG. 31):

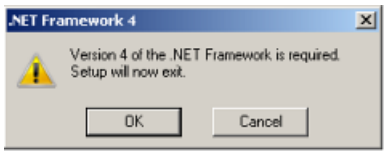

FIG. 31 .NET Framework version 4 required to run RMS Scheduling Interface and Plugins

In this case, click **OK** to exit the installation, install version 4 of .NET, and start over.

3. Follow the on-screen prompts to complete installation of the RMS Lotus Notes Domino Plug In.
4. In the final Lotus Notes Domino installation dialog, click **Next** to launch the *RMS Enterprise Scheduling Configuration* tool.

Registering the Plugin

Once the Lotus Notes Domino Plugin has been installed, it must be registered. Click **Next** in the final Lotus Notes Domino installation dialog to launch the *RMS Scheduling Configuration* tool. Use this tool to Register the plug-in and configure it to communicate with RMS Enterprise.

1. In the *Scheduling Plugins* tab, select **Lotus Notes Scheduling Plugin** from the list of installed Scheduling Plugins. Unless you have installed others previously, this should be the only Scheduling Plugin indicated (FIG. 32).
2. Click the **Register** button at the bottom of this tab.

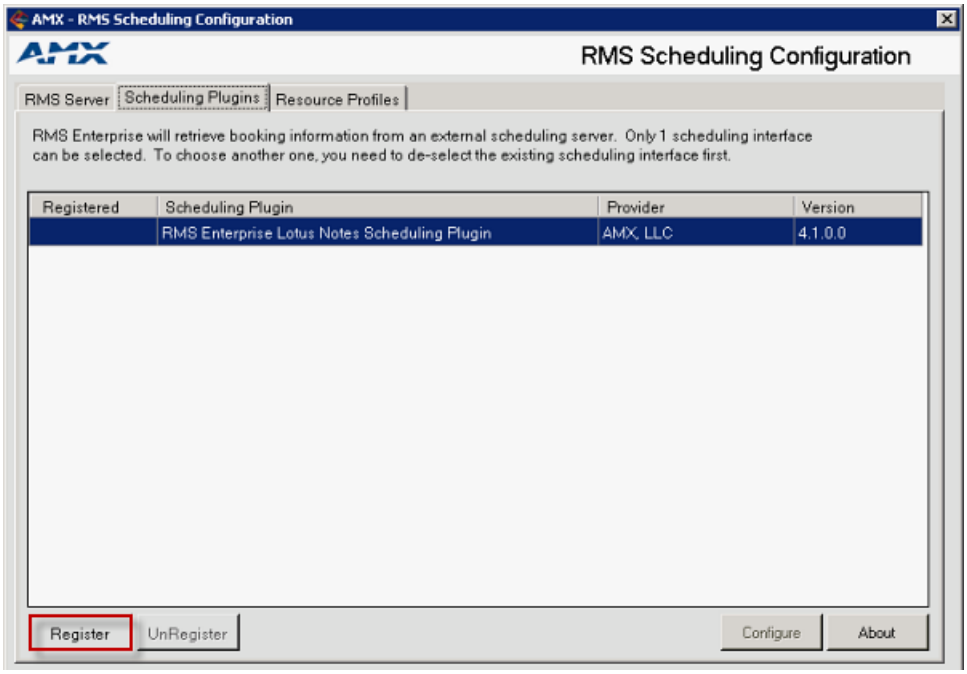

FIG. 32 RMS Scheduling Configuration - Scheduling Plugins tab

3. This action invokes the *Lotus Notes Plugin Settings* dialog - **Domino Server** tab. Use this tab to configure the Lotus Notes Domino Server Address, and Notes Authentication credentials (FIG. 33).

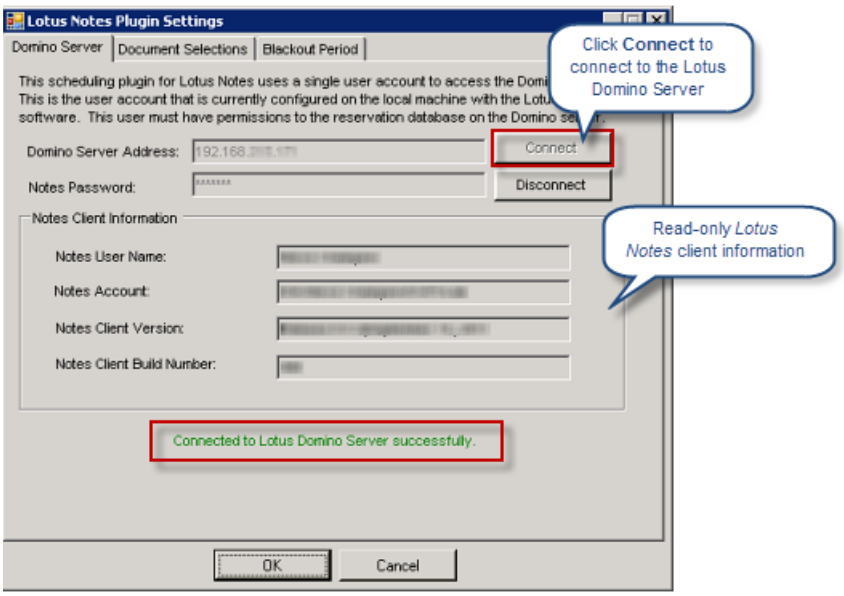

FIG. 33 Lotus Notes Plugin Settings dialog - Domino Server tab.

4. Enter the **Domino Server Address** and **Notes Password** for the Domino Server in the two text fields. The RMS application will use the account the Notes Client has been configured as to login.
5. Click **Connect** to ensure the Domino Server Address and password are valid. When the "*Connected to Lotus Domino Server successfully*" message is displayed (as shown in FIG. 33):
   - The (read-only) *Notes Client Information* fields are populated with the information associated with the Lotus Notes Client user account that is currently configured on this PC with Lotus Notes client software.
   - Once you have successfully connected to the Lotus Domino Server, the next item to configure is the Resource Reservation database (in the *Document Selections* tab).

Document Selections

IBM Lotus Domino uses a document-oriented database to manage semi-structured data like rich text and files. The data is stored as documents and views, to gain efficiency in finding specific documents. The **Document Selections** tab of the *Lotus Notes Plugin Settings* dialog contains the settings for selecting a Lotus Notes Resource Reservation database to associate with this Location, and for configuring a pre-defined formula for document searches (FIG. 34):

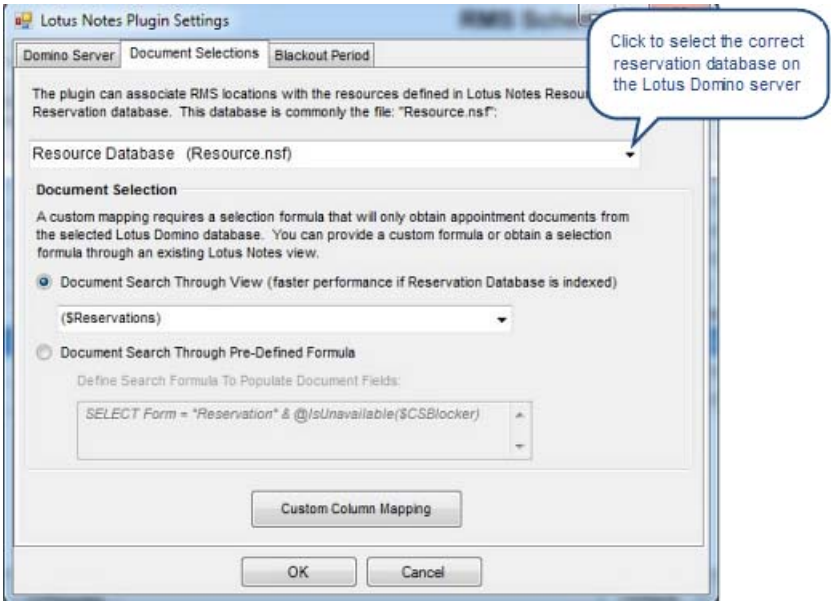

FIG. 34 Lotus Notes Plugin Settings dialog - Document Selections tab

NOTE: *You must first connect to the Lotus Domino Server to set the Resource Database or any custom mappings. Therefore, the options in this tab are disabled until you have successfully connected to Lotus Domino Server.*

1. Use the drop-down menu at the top of this tab to select the Lotus Notes Resource Reservation database from a listing of all databases that are provided on the Lotus Domino server:

- 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.
- The name of this database is based on the name it was given when it was created. The database file name is typically "*Resource.nsf*".

2. The Lotus Notes Appointment Interface populates Lotus Notes meeting documents from the Lotus Domino server.

   There are two ways to fetch the documents from Domino server. Under **Document Selection**, select a *Document Search* option:

Document Search Through View (Recommended)

RMS plugin can fetch meeting documents through Domino's Resource database views.

This approach is much faster at fetching meeting documents than querying through pre-defined formula (see below).

NOTE: *The Domino Reservation database must be indexed to ensure optimal performance.*

Document Search Through Pre-Defined Formula

The default query formatting is shown below:

DefaultResourceAppointmentFormula= (@Contains(Form; ""Reservation"")) & (@IsAvailable($BusyName))& (@UpperCase($BusyName)=@UpperCase(""%%BusyName%%"")) & (@TextToNumber(ResourceType) = 1) & (EndDateTime > @TextToTime(""%%SyncStart%%""))

At runtime, RMS plugin will replace any word between **%%** with specific room name or sync time.

Currently this default query is not exposed to the user in UI, but you can define your own query formula by adding the key-value pair:

"DefaultResourceAppointmentFormula=my_own_formula"

to the [PLUGIN_CONFIGURATION] section in the *legacytroller.ini* file.

Custom Column Mapping

Lotus Domino products are highly customizable - for example, you can define custom document fields. The settings in the *Custom Column Mapping* dialog affect the reservation information that is sent to the Touch Panel(s). FIG. 35 shows an example Touch Panel display:

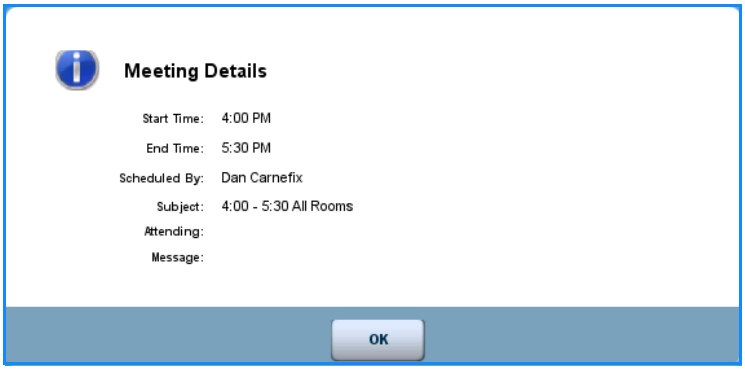

FIG. 35 Example Touch Panel Scheduling display

1. In the *Document Selections* tab, click **Custom Column Mapping** to open the *Custom Column Mapping* dialog (FIG. 36):

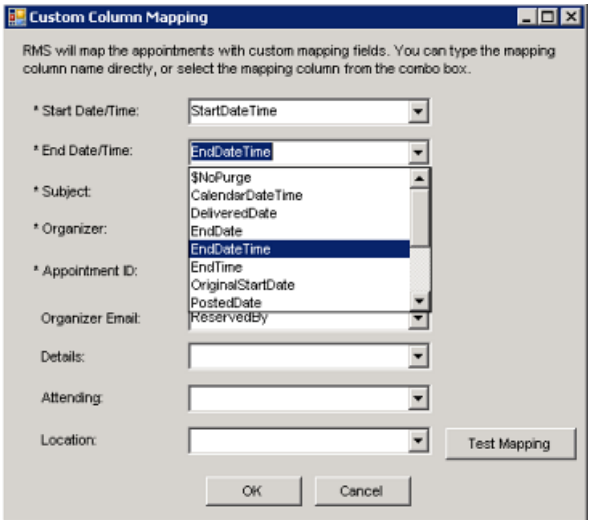

FIG. 36 Custom Column Mapping dialog

This dialog allows you to map your customized Lotus Notes fields to RMS appointment fields.

2. Use the drop-down menus to select or change the column settings for **Start Date/Time**, **End Date/Time**, **Subject** and **Organizer**.

   For example, the RMS appointment field "*EndDateTime*" is mapped to the Lotus Notes field "*EndDateTime*" by default. To change that mapping, choose another *DateTime* type from the drop-down menu.

3. Fill in the *Details* and *Attending* fields.
4. Click **Test Mapping** (in the *Custom Column Mapping* dialog) to test the mapping configuration. Results are displayed in the *Test Lotus Notes Mapping* dialog (FIG. 37):

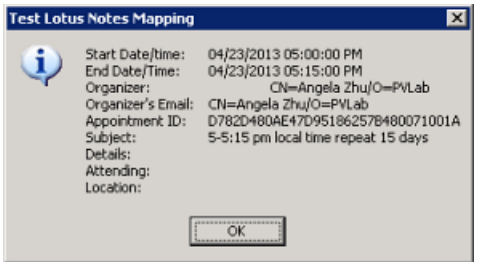

FIG. 37 Test Lotus Notes Mapping dialog

5. Click **OK** to save changes and close this dialog.

Configuring a Blackout Period

The **Blackout Period** tab of the *Lotus Notes Plugin Settings* dialog contains the settings for scheduling a trolling blackout period (FIG. 38).

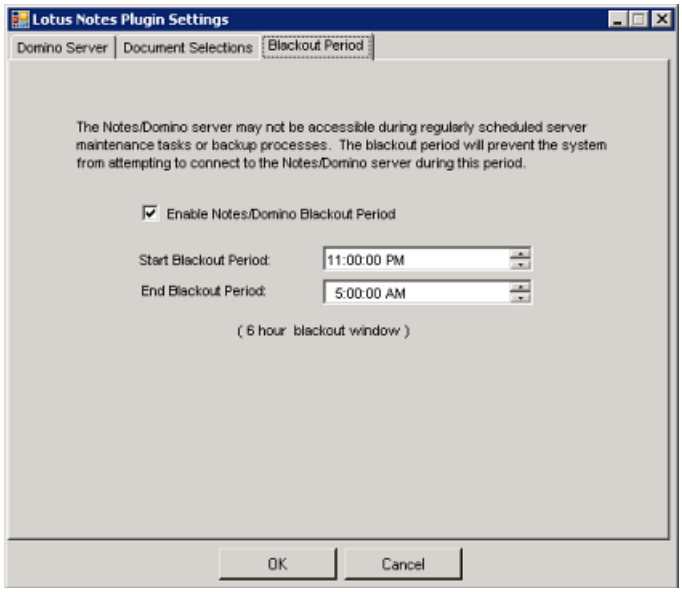

FIG. 38 Lotus Notes Plugin Settings dialog - Blackout Period tab

Many systems perform nightly backups or system related processing where the server may not be available or should not be accessed. The blackout option prevents the RMS application from accessing the server during these times.

During this blackout period, The RMS application will not attempt to establish a connection to any Lotus Domino Notes server.

- This option is enabled by default and is recommended.
- You may change the time frame to accommodate your specific environment.
- After you set all the appropriate plugin settings, click **OK** to complete the plug-in configuration. This action returns you to the *RMS Scheduling Configuration* application - *Scheduling Plugins* tab.

You can return to this configuration at any time using the *RMS Scheduling Configuration* application, selecting this plug-in from the list, and clicking the **Configure** button (FIG. 39):

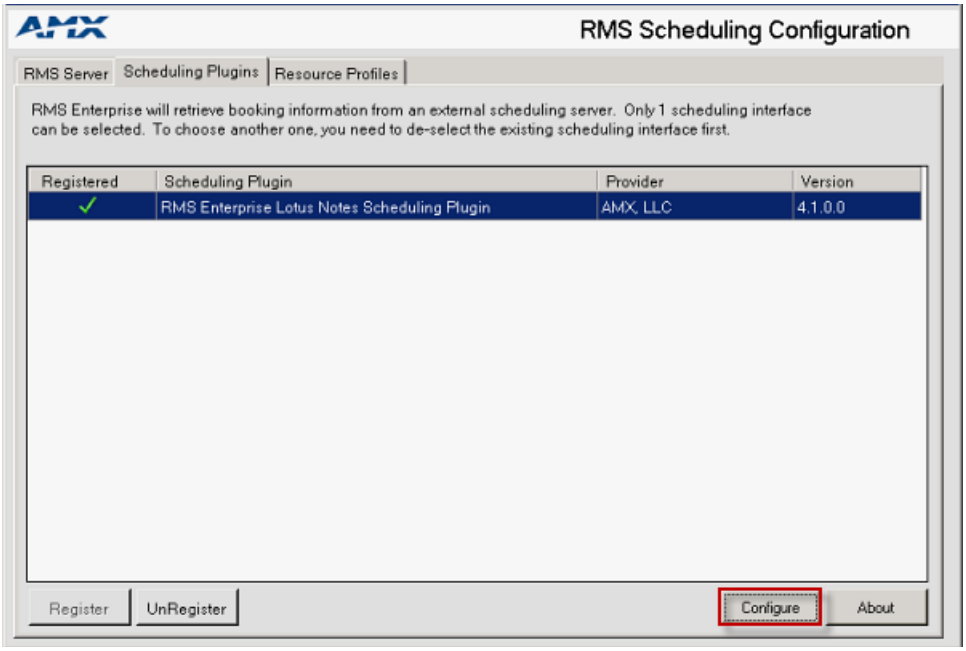

FIG. 39 RMS Scheduling Configuration application (Scheduling Plugins) - Configure button

About Dialog

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 (FIG. 40):

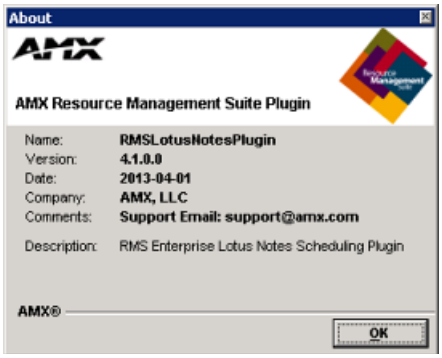

FIG. 40 About dialog

Resource Profile Configuration

RMS Enterprise will retrieve Resource Profiles for the currently registered external scheduling Server based on the selections made in the **Resource Profiles** tab of the *RMS Enterprise Scheduling Configuration* application (FIG. 41):

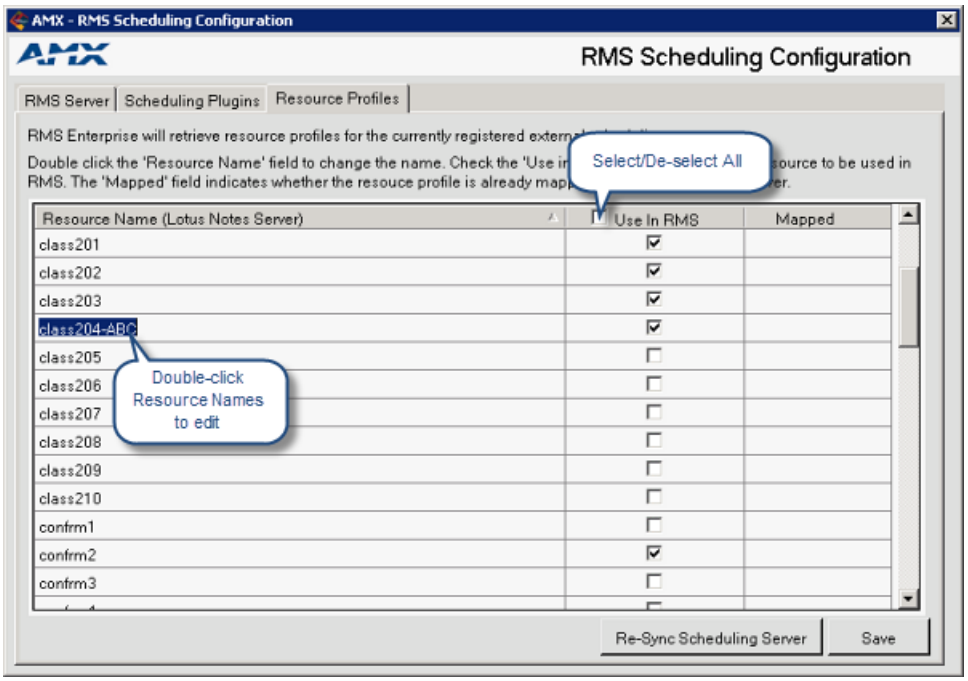

FIG. 41 RMS Scheduling Configuration application - Resource Profiles tab

- Select the **Resource Name (Lotus Notes Server)** fields to change the name.
- Select the **Use In RMS** option for each resource to be used in RMS (select the checkbox in the column heading to select or de-select all resources).
- The **Mapped** column indicates whether each resource profile is already mapped to a location in the RMS Server
- Click **Re-Sync Scheduling Server** to update the resource list.
- Click **Save** to save changes.

Configuring the RMS Service Account (Notes)

Overview

This section provides instructions for configuring the RMS Enterprise Legacy Trolling Service to use with the AMX Service Account.

Configuration of the AMX Service Account is described in the *Configuring a Room Mailbox (Notes)* section on page 6, and the *Configuring Lotus Notes Database Permissions* section on page 8.

1. On the server that has the RMS Scheduler and Plug-In installed, open the Services Management page (FIG. 42):

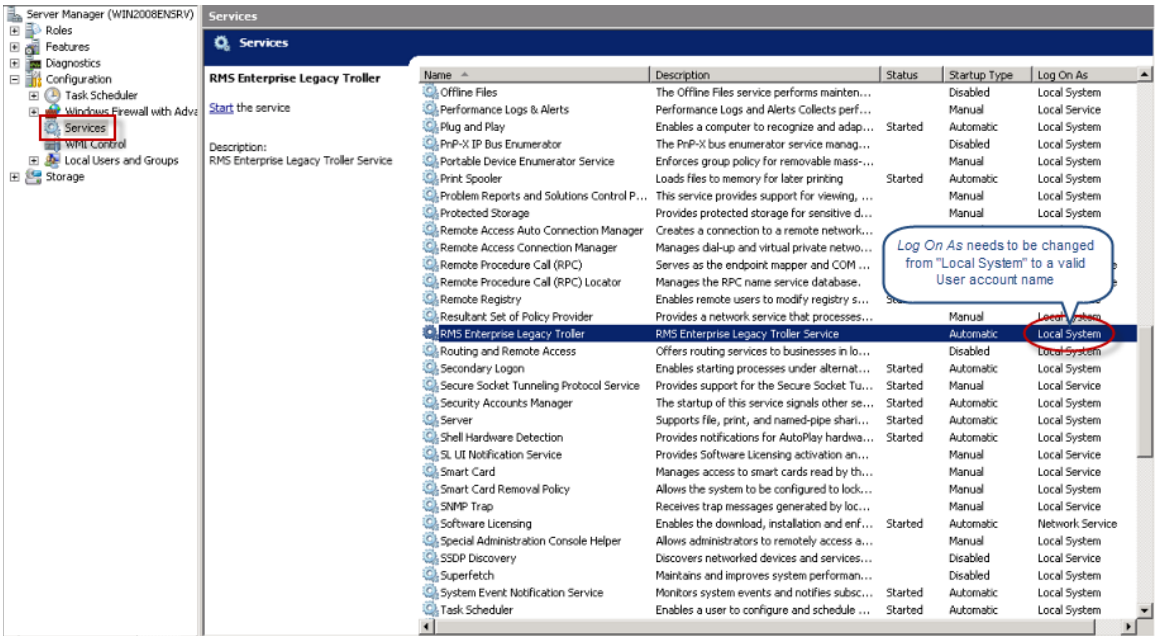

FIG. 42 Server Manager - Configuration > Services

2. Right-click on the *RMS Enterprise Legacy Troller* service and select **Properties** to open the *RMS Enterprise Troller Properties* dialog. Click on the **Log On** tab (FIG. 43):

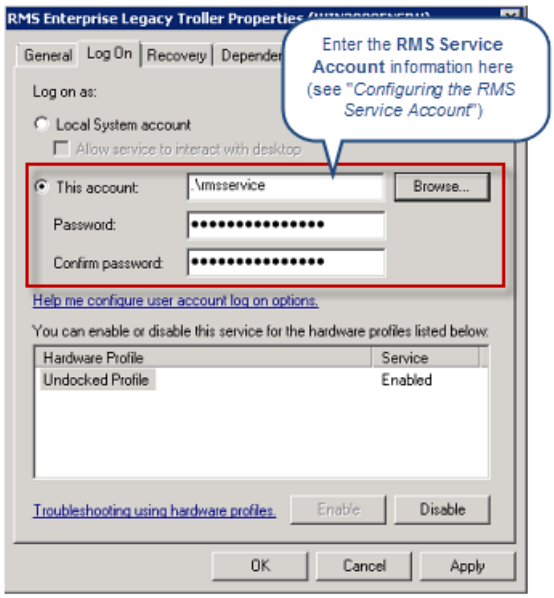

FIG. 43 RMS Enterprise Legacy Troller Properties dialog (Log On tab)

3. Select **This Account**, and enter the (RMS Service) user account information that will be used as the RMS Service Account.

   NOTE: *The account information entered here must match the account information for the RMS Service Account.*

4. Click **Apply** to save changes, close this dialog and return to the main *Services* page. At this point, the **Log On As** entry for *RMS Enterprise Legacy Troller* should indicate the RMS Service Account that was defined in the *RMS Enterprise Troller Properties* dialog (FIG. 44):

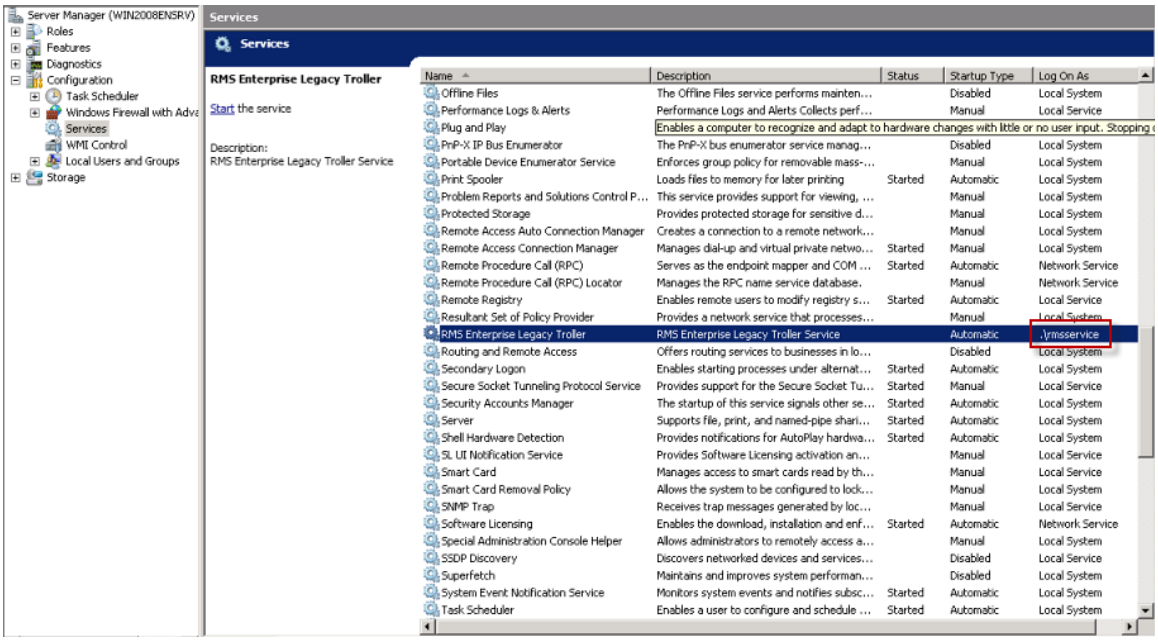

FIG. 44 Server Manager - Configuration > Services

Location to Resource Profile Mapping

Overview

It is necessary to map each of the selected resources (Locations) in the *RMS Enterprise Scheduling Configuration* tool to a *Resource Profile*, in order to enable the scheduling interface for each location. This requires accessing the Location Management page in the RMS Enterprise UI:

1. In the RMS Web UI, select **Management > Configure Locations/Clients > Locations** (FIG. 45):

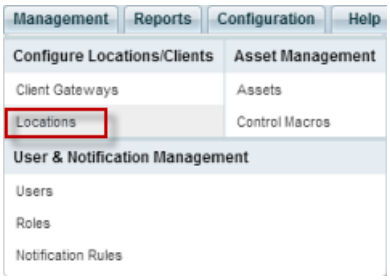

FIG. 45 RMS Web UI - Management > Configure Locations/Clients > Locations

2. This opens the main Location page. In the *Locations* window, select a Location name from the list and click **Edit** (FIG. 46):

FIG. 46 RMS Web UI - Locations Page - Edit button

3. This opens the **Location Edit** page (*Settings* tab).
4. Under **Scheduling Configuration**, open the *Resource Profile* drop-down list to select a Resource Profile to map to this Location (FIG. 47):

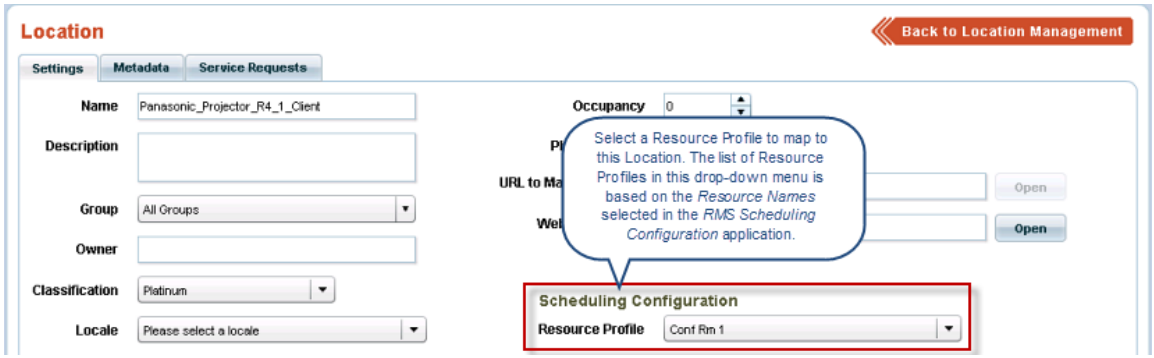

FIG. 47 RMS Web UI - Location Edit Page - Scheduling Configuration drop-down menu

> **NOTE:** *The list of Resource Profiles that are available to select in this menu is based on the Resource Names that were selected in the RMS Scheduling Configuration application - Resource Profiles tab. Note that if any of the names were edited in the RMS Scheduling Configuration application, the edited names are displayed here.*

This will associate the location with the selected Resource Profile (i.e. the Exchange room mailbox).

5. Click **Apply** to save changes.

As Resource Profiles are mapped to Locations, a green checkmark is added to the RMS Scheduling Configuration application - *Resource Profiles* tab (*Mapped* column) to indicate which Locations have been mapped. For example, FIG. 48 on page 33 shows the RMS Scheduling Configuration application, indicating that "*ConfRm1*" is mapped:

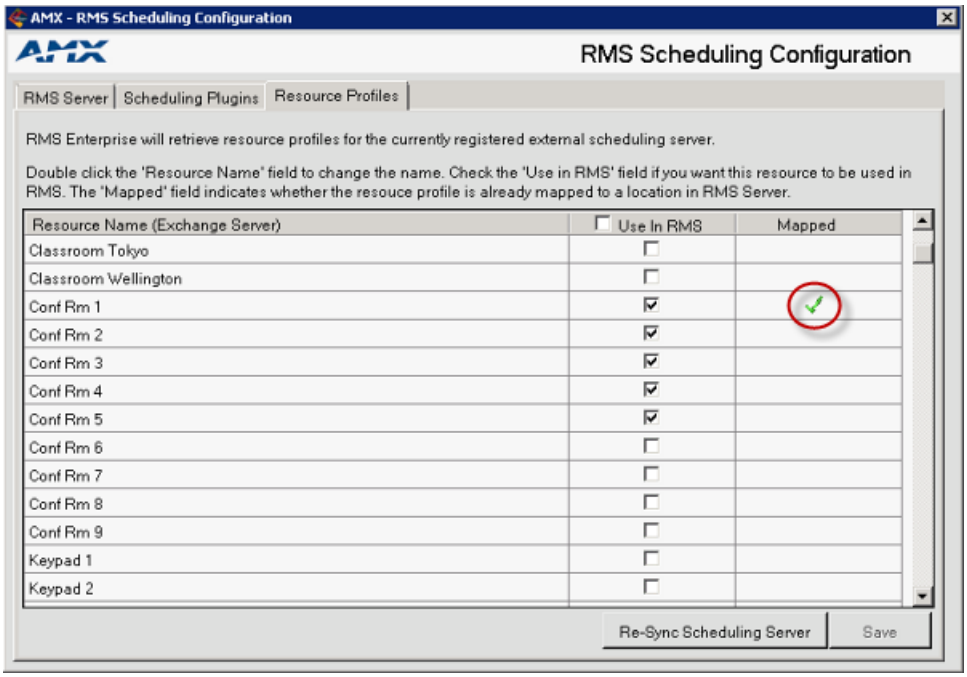

FIG. 48 RMS Scheduling Configuration application (indicating "ConfRm1" mapped)

Known Issues

Overview

This section provides information on known issues relative to the RMS Enterprise Interface for Lotus Notes Domino.

- Recurring appointments in Lotus Notes that have "No End Date" specified will be limited to two years of occurrences synchronized into RMS. After the two years elapses, no further bookings for that series will be synchronized into RMS. It is recommended that recurring appointments either have a specific end date or a number of occurrences defined.
- Changing the attendees of an existing meeting doesn't actually modify the meeting in Lotus Notes. This is simply how Lotus Notes behaves. As a result, the meeting will not be resynchronized to RMS and the attendee changes won't be reflected in RMS. Something such as the subject, body, or date/time must be changed in order for a synchronization to RMS to occur.
- Ending or extending a meeting from the touch panel will only update the resource's calendar. The meeting time will not be adjusted on the calendars for the organizer and attendees.
- The RMS Exchange Appointment Organizational Form is not compatible with this plug-in.

Troubleshooting - Scheduling Error (Displayed in Hotlist)

If you receive the following error message (as a Hotlist item):

The troller process "<hostname>", running at "<IP Address>", has encountered a scheduling error. Please check the scheduling provider and verify the RMS Legacy Troller configuration settings (FIG. 49):

FIG. 49 Hotlist indicating a scheduling error

If this error occurs the user will not be able to schedule appointments. To correct this error:

1. Open the *Services* dialog.
2. Select **RMS Enterprise Legacy Troller**.
3. Select **Properties** for this service.
4. Select the **Log On** tab.
5. Change from *Local System account* to **This account**.
6. Enter in the proper credentials.
7. **Save** and restart the service.

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