

INSTALLATION MANUAL

RMS-SCH-LN

RMS ENTERPRISE INTERFACE FOR LOTUS NOTES[®] DOMINO



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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).

AMX Domain - pv-lotusnotes/PVLab - IBM	I Domino Administrator			_ 🗆 ×
File Edit View Create Actions Administratio	n People Help			
3 7 3 4 4 4 5 100 A E	8			
	2			
AMX Domain - pv-lotusnotes				
People & Groups Files Server Messa	ging Replication Configuration			
		Click R	egister to	
Server: pv-lotusnotes/PVLab	und andham/64.6.0	Now F	e negisiei Introdialaa	ols
Therease d. s. or window	war congritarity of a co	IVEW L	intry dialog	
Domino Directories	Add Person 🖉 Edit Person 🐽 De	lete Person Dopy to Persona	Addres	People -
AMX's Directory				4
23 Groups	Name ^	Telephone	Comp	Register
Mailin Databases and B	Administrator			Move to Another Server
Palicies	Administrator, RMS			Rename
V III Dunamic Policies	Carns , Randy	(office) 800.555.6615	AMX	Delete
by Person/Groun	Champ, Bob	(office) 800.555.1243	AMX	Desertify
by Category	Fiauber, Poug		AMX	Recently
Settings	Friewis , Adam	(office) 800.555.6602	AMX	Set Internet Address
Certificates	Harrian , Alan	(office) 800.555.7696	AMX	Validate Internet Address.
Alt Language Info	Hella , Roam	(office) 800.555.6556	AMX	Reaming
A Denv Access Groups	Murrian , Dan	(office) 800.555.6744	AMX	noanning
The state of the s	Johns , Dave	(office) 800.555.7650	AMX	Assign Policy
	Jones, Tonny	(office) 800.555.6753	AMX	Create Replica(s)
	Lees , Cathy	(office) 800.555.6739	AMX	Find User(s)
	Pegg, Alan	(office) 800.555.8765		Policy Supervis
	Service, RMS	(-#) 800 EEE 7202	ALC:	Policy dynopsis
	Talla Amar	(office) 800.555.7302	AMA	Upgrade
	Test D/	(office) 600.555.7719	AMX	License Tracking
	Christopher Cathy	(office) 900 555 6722	AMY	Open Fault Reports
	Zhuber Pate	(office) 800.555.7386	AMX	Set DP2 Liser Name
	2110001,1 616	(01100) 000.000.1000	AMA	Second Oser Name
				Validate DB2 User Name
				Encryption Capabilities

FIG. 1 Domino Administrator

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

	Registration Server. First name:		ab I	Last name:	Short name
	RMS			Service	rmsservice
	P <u>a</u> ssword:	Majl system:		Explicit policy	
	12ms34	Lotus Notes	•	(None Available)	
	Create a Notes ID	this person for this person	Import	Policy Synopsis Click to nev	Add the v User
legistration Que	sue (local):		mpore	- age - seco	
∧ User №	Name ^	^ Registration Sta	itus ^		Date ^

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).

MX Domain - pv-lotusnotes/PVLab	We	come X						
annia & Groupe Files Samar Ma		a Berlication Configur	ation					
echie « circulte rises perveria me	sadyi	ig [nepication] contigui	auon I					
Server: pv-lotusnotes/PVL	ab		Show me	atabases only	-			Tools
Release 8.5.3FP4 on Wi	ndows	/Longhom/64 6.0	chow me. p	alabases only		37	All	
C:\Program Files\IBM\Lotus\Dor		Title 🕈	Filename O	Physical Path 🗘	File Form	>	-	Disk Space
🚞 dic		AMX's Directory	names.nsf	C:\Program Files\IBIv	R6 (4 +	/		Disk opace
🕨 🧰 domino		Catalog (8)	catalog.nsf	C:\Program Files\IBIV	R6 (4	>	G	Folder
🧰 etc		CPP FreeBusy WebServ	cppfbws.nsf	C:\Program Files\IBIv	R6 (4		_	
jetrhome	0	cppfbws	cppfbws.ntf	C:\Program Files\IBI∕	R6 (4	>	0	Database
i help		Domino Directory Cache	dbdirman.nsf	C:\Program Files\IBlv	R6 (4	1	1000	DD2 C
iNotes		Domino Domain Monito	ddm.nsf	C:\Program Files\IBI∕	R6 (4	1	0.02	DB2 Groups
🧀 mail		Domino LDAP Schema	schema.nsf	C:\Program Files\IBIv	R6 (4			
properties		Domino Web Administra	webadmin.nsf	C:\Program Files\IBIv	R6 (4			
🕨 🧰 rmeval		DPI (Domino Portal Inte	dpicfg.nsf	C:\Program Files\IBM	R6 (4			
- W32		Homepage (8.5)	homepage.nsf	C:\Program Files\IBlv	R6 (4			
Sectalog (8)		Java AgentRunner	agentrunner.ns	C:\Program Files\IBI∨	R5 (4			
		Local free time info	busytime.nsf	C:\Program Files\IBlv	R6 (4			
		Lotus Notes/Domino Fa	Indfr.nsf	C:\Program Files\IBIv	R6 (4			
		Lotus Notes/Domino Sn	Indsutr.nsf	C:\Program Files\IBIv	R6 (4			
		Monitoring Configuratio	events4.nsf	C:\Program Files\IBI∨	R6 (4			
		Offline Services	doladmin.nsf	C:\Program Files\IBI∕	R6 (4			
		pv-lotusnotes's Log	log.nsf	C:\Program Files\IBlv	R6 (4			
		Reports for pv-lotusnote	reports.nsf	C:\Program Files\IBIv	R6 (4			
	0	Resource Database	resourceinsf	C\Program Files\IBM	R6 (4			
		Sample Web Agent - Re	pwdresetsamp	I C:\Program Files\IBlv	R6 (4			
		Server Certificate Admin	certsninsf	C)Program Files)IBh/	B6 (4-			

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).

and alloca all	1	Properties	1	
MX Domain - pv-lotusnotes/PVLab	Welcome X ssaging Replication ab	New Update Link Delete Folder Manage Directory ACL		I v Tools
C:\Program Files\IBM\Lotus\Dor dr dr dr dr dr dr dr dr dr	Tile ♦ MAX's Director Catalog (8) CPP FreeBusy cppfbws Domino Directi Domino Doma Domino Doma Domino Dob Domino Dob Dob Dob Dob Dob Dob Dob Dob	Compact Compact Pull Text Index Multi-Database Index Advanced Properties Quotas Move Sign Replication Fixup Cluster Delete Database Open In Designer Analyze Find Note Create Event Manage Views Update Rediract Edt D82 Login Information Recreate Links to D82-based NSF databases ent - Re pwdresets ampl C:\Program Files\UBM e Admin certary.nsf C:\Program Files\UBM	Copy Paste Manage 86 (4)	Disk Space Folder Database DB2 Groups
	1 flade) and and	6 MD /6 552 600 b-tool		

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). .

Basics	Access Control List			Attribut	
Boles	People, Servers, Groups	Show All	*	User type	Person
g holes g Log g Advanced	Oefault Administrator/PVLab Anonymous LocaDomainAdmins LocaDomainServers DtherDomainServers pv-lotusnotes/PVLab RMS Administrator/P RMSService/PVLab Click to open the Names dialog Add. Elfective Access Full name: RMSService/P An Access Control List (A database. Select a name name	VLab PVLab PVLab PVLab CL) defines who can vi in the list to see or set	Remove	Access	Manager documents documents personal loiders/views shared folders/views LotusSoript/Java agent subic documents ate or copy documents [] [AdminDelete] [] [CreateResource]

FIG. 5 Access Control List dialog

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

Add User	click to open the Select Names dialog
People, Servers, Groups	
1	

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):

Select Names					? ×
Choose the directory, the	n type all or part of the name.	-			
Find names starting with:				Names	
LocalDomainS A OtherDomainS	ervers	_		44 Names:	_
ouerosmane	er vera		Add 🕨		
		•			
Details,	onfacts			Remove Remove All	
Add name not in list					
Tip: You can drag and dr	op the names			OK C	ancel

FIG. 7 Select Names dialog

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

Select Names		2 🛙
Choose the directory, then type a Directory:	Il or part of the name. s Directory	
Find names starting with:	Lab Lab Lab Lab Lab	Names
Details Add to Contacts Add name not in Sist Tip: You can drag and drop the n] names	Remove Remove All

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):

Basics	Access Control List			
Roles	People, Servers, Groups	Show All	✓ User type	Person _
g Log g Advanced	Oefault- Administrator/PVLab Anonymous LocaDomainServers OtherDomainServers pv-lotusnotes/PVLab RMS Administrator/P RMSService/PVLab	Access Create	Manager documents documents documents private agents personal folders/views shared folders/views subto documents subto documents ale or copy documents	
	Add Elfective Access	Rename Remove		
Last charges &	Full name: RMSService/F An Access Control List (A database, Select a name name, 05/29/2013)	VLab CL) defines who can view and edit, in the list to see or set the access i 15.02.15 DM	your Notes assigned to the	

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):

🙆 AMX Domain - pv-lotusnotes/PVLab	- IBM Dor	nino Administrator					_ 🗆 ×
File Edit Administration Files Help							
68899							
AMX Domain - pv-lotusnotes/PVLab							
People & Groups Files Server N	lessaging.	. Replication Configura	ation				
	1.12	10.00			-	s The	
Release 8.5.3FP4 on V	Lab /indows/L/	onghorn/64 6.0 De	atabases only	2	All	> Tools	
🚽 🤝 C:\Program Files\IBM\Lotus\Do	T	itle 0	Filename 🗢	Physical Path	i C	File Format O	Logical Size 🗘 🕴
i dic	🚫 A	dministration Request:	admin4.nsf	C:\Program	Files\IBM	R6 (43:0)	5,242,880
🔍 🕨 📄 domino	💊 J	ava AgentRunner	agentrunner.ns	C:\Program	Files\IBM	R5 (41:0)	458,752
i etc	💊 L	ocal free time info	busytime.nsf	C:\Program	Files\IBM	R6 (43:0)	51,642,368
🥌 gtrhome	S 0	atalog (8)	catalog.nsf	C:\Program	FilesUBM	R6 (43:0)	2,359,296
i help	💊 A	MX's Certification Log	certlog.nsf	C:\Program	Files\IBM	R6 (43:0)	458,752
iNotes	💊 s	erver Certificate Admin	certsrv.nsf	C:\Program	FilesVBM	R6 (43:0)	1,253,376
🧰 mail	S 0	PP FreeBusy WebServ	cppfbws.nsf	C:\Program	Files\IBM	R6 (43:0)	589,824
properties	🚫 c	ppfbws	cppfbws.ntf	C:\Program	FilesVBM	R6 (43:0)	589,824
🕨 🧰 meval	S 6	Iomino Directory Cache	dbdirman.nsf	C:\Program	FilesNBM	R6 (43:0)	1,474,560
System	S 0	omino Domain Monitc	ddm.nsf	C:\Program	Files\IBM	R6 (43:0)	6,291,456
📄 W32	S 0	offline Services	doladmin.nsf	C:\Program	FilesVBM	R6 (43:0)	774,144
Catalog (8)	S 0	PI (Domino Portal Inte	dpicfg.nsf	C:\Program	Files\IBM	R6 (43:0)	958,484
	1 N	Ionitoring Configuratio	events4.nsf	C:\Program	Files\IBM	R6 (43:0)	30,670,848
	S +	lomepage (8.5)	homepage.nsf	C:\Program	FilesUBM	R6 (43:0)	458,752
	💊 L	otus Notes/Domino Fa	Indfr.nsf	C:\Program	Files\IBM	R6 (43:0)	2,621,440
	1 S L	otus Notes/Domino Sn	Indsutr.nsf	C:\Program	FilesVBM	R6 (43:0)	774,144
	S P	v-lotusnotes's Log	log.nsf	C:\Program	FilesVBM	R6 (43:0)	25,952,256
	🚫 A	MX's Directory	names.nsf	C:\Program	FilesVBM	R6 (43:0)	19,922,944
	S ()	ample Web Agent - Re	pwdresetsampl	C.\Program	FilesVBM	R6 (43:0)	458,752
	🚫 F	leports for pv-lotusnote	reports.nsf	C:\Program	Files\IBM	R6 (43:0)	995,328
	😡 F	lesource Database	resource.nsf	C:\Program	FilesUBM	R6 (43:0)	2,995,257,344
	S 0	omino LDAP Schema	schema.nsf	C:\Program	FilesVBM	R6 (43:0)	2,883,584
	I I I I	Iomino Web Administra	webadmin.nsf	C:\Program	FilesVBM	R6 (43:0)	8,126,464
							,
•	1 file(s) selected 2.8 GE	3 (2,995,257,344	bytes)			
			dent di ci	•)[• [.7]	 Online 	• 🗆 •

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

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):

Create View	2 🛛	
View name	View type	
Untitled	Shared	•
Select a location fo	or the new view	
-Views -		*
By Requ	estor & Date	
By Requ	estor & Resource	
- 🖳 My Rese	rvations	
Reserva	tions By Date	
- Reserva	tions By Resource	
Reserva	tions waiting for approval	-
Copy style from vie	w Reservations By Date ions ch @ By Formula	Copy From
REM(need fom REM (for now r (Form; 'Reserv (\$BusyName) & (\$BusyPriority =	nula to be based on version); emoved SELECT (@Contains aton") & @IsAvalable [(@IsAvailable(\$EusyPriority)] "1" & @IsAvailable(\$ESVersion))	Fields & Functions Formula Window
<u>1</u>	OK Save and Cu	istomize Cancel

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):

Create View		? ×
View name	View type	
DeletedReservatio	ns Shared, contains deleted documents	•
Select a location for	the new view	
🐷 - Views -		*
- 📰 By Reques	tor & Date	
- 📰 By Reques	tor & Resource	
- 🖳 My Reserv	ations	
- 📰 Reservatio	ns By Date	
- 🖂 Reservatio	ns By Resource	
Reservatio	ns waiting for approval	•
Copy style from view	Reservations By Date	Copy From
		Lunit
	OK Save and Custo	mize Cancel

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):

reate View		2 X
View name	View type	
DeletedReservatio	ns Shared, contains deleted document	ts 💌
Select a location for	the new view	
🖅 - Views -		
- 📰 By Reques	stor & Date	
- III By Reque	stor & Resource	
- 🖳 My Reserv	ations	
- 📰 Reservatio	ns By Date	
- 📰 Reservatio	ns By Resource	
Reservatio	ns waiting for approval	-
Conu stule from view	Reservations By Besource	Core From
copy cyle nom nom	The second and by The second second	Copy riding.

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:

Resource Reservations	New Site	e New Resource	New Rese	rvation Quick Reservation	Chat 🔻
Resource Database		Start Time	- End Time	Reserved For	Phone
	▼ C	N=amxdev1/0=P	V Test Lab	(Room)	
🔻 🕠 Reservations	Σ	09:00 AM	- 10:00 AM	Adam Harris/PVLa	Ь
📰 By Date	2	09:00 AM	- 10:00 AM	Adam Harris/PVLa	ь
🛅 By Resource	2	10:00 AM	- 11:00 AM	Administrator/PVL	ab
🔲 By Requestor & Date	3	11:00 AM	- 11:30 AM	Adam Harris/PVLa	Ь
By Requestor & Besource	3	04:30 PM	- 05:00 PM	Adam Harris/PVLa	Ь
Waiting for approval	Σ	10:00 AM	- 11:00 AM	Administrator/PVL	ab
Cardina d	E E	11:00 AM	- 11:30 AM	Adam Harris/PVLa	Ь
Decined (Second	E S	11:30 AM	- 12:00 PM	Administrator/PVL	ab
Calendar	Z	04:30 PM	- 05:30 PM	Adam Harris/PVLa	Ь
My Reservations	×	04:30 PM	- 05:30 PM	Adam Harris/PVLa	Ь
Resources	2	04:30 PM	- 05:30 PM	Adam Harris/PVLa	ь
📰 Sites	2	04:30 PM	- 05:30 PM	Adam Harris/PVLa	b
🕨 🚞 By Requestor & Date	2	05:00 PM	- 05:30 PM	Adam Harris/PVLa	b
DeletedReservations	2	05:00 PM	- 05:30 PM	Adam Harris/PVLa	b
DeletedResv	2	06:00 PM	- 06:15 PM	Adam Harris/PVLa	b
116	2	06:00 PM	- 06:30 PM	Adam Harris/PVLa	.b
	2 ×		- 06:30 PM	Adam Harris/PVLa	.b
	2 ×		- 07:30 PM	Adam Harris/PVLa	.b
		07:00 PM	- 07:30 PM	Adam Harris/PVLa	
		08:00 PM	- 08:30 PM	Adam Harris/PVLa	
		TT:30 AM	- 12:30 PM	Adam Harris/PVLa	D
	•		V Lest Lab	(Room)	
		02.40 FM	00-04 AM	Cathy Lewis/FVLa Cathy Louis/PVLa	
		11-15 AM	- 05.04 AM	Cathy Lewis/FVLa	5 5
		11.10 AM	- 11.24 AM	Cathy Lewis/FVLa	5 5
I want in the second		00.00 AM	- 09.00 AM	Cathy Lewis/FVLa	5 5
and the second	*	09:00 AM	- 09:30 AM	Cathy Lewis/PVLa	U Contraction of the second se

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 Schedul	ing server meet the following Minimum Hardware Recommendations?	Yes	No	
Processor	Dual core Intel Xeon $^{\textcircled{8}}$ 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 co	Do you have a compatible Microsoft [®] Server OS installed? Yes			
Supported Micro	soft Server Operating Systems:			
Microsoft Win	dows Server 2012 Standard Edition			
Note: When us	ing Windows Server 2012, the administrator must install NET 4.0 or higher (required by the AMX Lice	ense Tool).		
Microsoft Win	dows Server 2008 R2 (x64): Web Edition / Standard Edition / Enterprise Edition			
Microsoft Win	Microsoft Windows Server 2008 SP2 (x86 and x64): Web Edition / Standard Edition / Enterprise Edition			
Yes	Yes Please continue to the next step.			
No	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 sy Scheduling Intern	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.			trative	

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 <u>www.amx.com/</u> <u>rms/</u>.
- 2. Double-click to launch the AMX RMS Scheduling Setup Wizard (FIG. 23):

🛃 AMX RMS Scheduling Setu	
AMX	Welcome to the AMX RMS Scheduling Setup Wizard
	The Setup Wizard will install AMX RMS Scheduling on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
	Back Next Cancel

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

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

nd-liser License Agreement	
New and the following for the second se	Ð
Prease read the following license agreement carefully	
AMX LICENSE AGREEMENT	^
	Ξ
By clicking the "LAgree" button below, you ("Licensee") agree to be bound by, and AMX Corporation ("AMX") shall be entitled to enforce this AMX License Agreement	
("Agreement"). By clicking the "I Disagree" button below, Licensee (i) does not agree	
to be bound by this Agreement; (ii) shall not be permitted access to the software	
accompanying, or obtained through, this media (the "AMX Software"); and (iii) if	
expense, to AMX at 3000 Research Drive, Richardson, Texas 75082, USA.	
 LICENSE GRANT. AMX grants to Licensee the non-exclusive right to use the AMX Software in the meaner described in this License. This license does not event. 	C
icensee the right to create derivative works of the AMX Software. The AMX	-
I accept the terms in the License Agreement	

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):

🛃 AMX RMS Scheduling Setup	- • •
Destination Folder Click Next to install to the default folder or dis	dk Change to choose anothe
Install AMX RMS Scheduling to:	
C: Program Files (AMX) Resource Management	Suite\Scheduler\
	Back Next Cancel

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):

房 AMX RMS Scheduling Setup	- • •
Ready to install AMX RMS Scheduling	AMX
Click Install to begin the installation. Click Back to review or change an installation settings. Click Cancel to exit the wizard.	y of your
Back	Cancel

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):

Installing AMX RMS Scheduling		ling		AM
Please wai	t while the Setup Wizard	installs AMX RMS Sc	heduling.	
Status:	Validating install			
		Back	Next	Cancel

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):

Welcome to RMS Lotus Notes Plug-In Setup		
AMX	Welcome to RMS Lotus Notes Plug-In Setup program. This program will install RMS Lotus Notes Plug-In on your computer.	
	It is strongly recommended that you exit all Windows programs before running this Setup Program.	
	Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program .	
	WARNING: This program is protected by copyright law and international treaties.	
	Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.	
AMXØ	Next> Cancel	

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):

.NET Fra	amework 4	×
<u></u>	Version 4 of the .NET Framework is required. Setup will now exit.	
	OK Cancel	

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.

AMX - RMS Sche	eduling Configuration			×
AMX		RMS Schedu	ling Confi	guration
RMS Server Scheduling Plugins Resource Profiles				
RMS Enterprise will retrieve booking information from an external scheduling server. Only 1 scheduling can be selected. To choose another one, you need to de-select the existing scheduling interface first.				
Registered	Scheduling Plugin	Provider	Ven	sion
	RMS Enterprise Lotus Notes Scheduling Plugin	AMX, LLC	4.1.0	0.0
Register	UnRegister		Configure	About

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).

🔜 Lotus Notes Plugin Set	tings			
Domino Server Document S	Selections I	Blackout Period	Click C	onnect to
This scheduling plugin for L This is the user account the software. This user must h	otus Notes u it is currently ave permiss	ses a single user account to acces configured on the local machine w ions to the reservation database or	ss the Domi with the Lotu n the Domino set	o Server
Domino Server Address:	192.168.3	0.1171	Connect	
Notes Password:	2333123		Disconnect	
Notes Client Information				Read-only Lotus
Notes User Name:		Real of the Property of the		
Notes Account:		PROFESSION PROPERTY AND		
Notes Client Version:		Banana (*********************************		
Notes Client Build Nur	nber:	1881		
Co	innected to L	otus Domino Server successfully.		
		DK. Cancel		

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):

Domino Serve	Document Selections	Blackout Period		Click to select the correct reservation database on
The plugin ca Reservation	an associate RMS locatio database. This database	ns with the resources defined in a is commonly the file: "Resource.	Lotus Notes Resou .nsf:	the Lotus Domino server
Resource D	Database (Resource.	nsf)		. ·
Document	Selection			
A custom ma the selected formula thro	apping requires a selection Lotus Domino database ugh an existing Lotus No	on formula that will only obtain ap You can provide a custom form tes view.	pointment document ula or obtain a select	s from tion
 Docume 	nt Search Through View	(faster performance if Reservati	ion Database is inde:	(ed)
(\$Reser	vations)		•	
O Docume	nt Search Through Pre-D	efined Formula		
Defin	e Search Formula To Pop	ulate Document Fields:		
SEL	ECT Form = *Reservatio	n* & @IsUnavailable(\$CSBlocke	er) *	
		Custom Column Mapping		

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".
- 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 keyvalue 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:

Meeting Details				
Start Time:	4:00 PM			
End Time:	5:30 PM			
Scheduled By:	Dan Carnefix			
Subject:	4:00 - 5:30 All Rooms			
Attending:				
Message:				
ок				

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):

🚂 Custom Column Map	ping 💶 🔀
RMS will map the appoint column name directly, or a	ments with custom mapping fields. You can type the mapping select the mapping column from the combo box.
* Start Date/Time:	StartDateTime
* End Date/Time:	EndDateTime
* Subject:	SNoPurge CalendarDateTime
* Organizer:	EndDate
* Appointment ID:	EndDateTime EndTime OriginalStartDate DosterDate
Organizer Email:	ReservedBy
Details:	•
Attending:	_
Location	Test Mapping
	OK Cancel

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):

Test Lotu	is Notes Mapping	×
٩	Start Date/time: End Date/Time: Organizer: Organizer's Email: Appointment ID: Subject: Details: Attending: Location:	04/23/2013 05:00:00 PM 04/23/2013 05:15:00 PM ON=Angela Zhu/O=PVLab CN=Angela Zhu/O=PVLab D782D480AE47D951862578480071001A 5-5:15 pm local time repeat 15 days
	[ОК

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).

🔜 Lotus Notes Plugin Settings					
Domino Server Document Selections Blackout Period					
The Notes/Domino server may not be accessible during regularly scheduled server maintenance tasks or backup processes. The blackout period will prevent the system from attempting to connect to the Notes/Domino server during this period.					
Enable Notes/Domino Blackout Period					
Start Blackout Period: 11:00:00 PM					
End Blackout Period: 5:00:00 AM					
End Blackout Period: 5:00:00 AM 4					
OK Cancel					

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):

/	MX			RMS Schedu	uling Configuration
F	RMS Server	Scheduling Plugins	Resource Profiles		
	RMS Enterp can be selec	rise will retrieve booki ted. To choose anoth	ing information from an external sche ter one, you need to de-select the exis	duling server. Only 1 sched ting scheduling interface fir	uling interface st.
[Registered	Scheduling Plu	ıgin	Provider	Version
	\checkmark	RMS Enterprise	e Lotus Notes Scheduling Plugin	AMX, LLC	4.1.0.0
	Register	UnRegister			Configure About

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):

About	×
AMX Resour	ce Management Suite Plugin
Name: Version: Date: Company: Comments:	RMSLotusNotesPlugin 4.1.0.0 2013-04-01 AMX, LLC Support Email: support@amx.com
Description	RMS Enterprise Lotus Notes Scheduling Plugin
AMX®	QK

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):

AMX	RMS Schedulin	g Configurat	ion
RMS Server Scheduling Plugins Resource Profiles RMS Enterprise will retrieve resource profiles for the currently registered extern Double click the 'Resource Name' field to change the name. Check the 'Use in RMS The 'Wanned' field indicates whether the resource profile is already man	Select/De-select All	source to be us	ed in
Resource Name (Lotus Notes Server)	Use In RMS	Mapped	-
class201 class202	N N		
class203	N		
class205			
class206 Double-click Resource Names			-
class208			
class209 class210			-
confrm1			
confrm2 confrm3			
	E Re-Suno Schedulin	a 9anuar 9.	

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):

Server Manager (WIN2008ENSRV)	Services						
🗉 📄 Roles	# c						
🖲 📷 Features	Services					i .	
 Diagnostics 		Nama é	Description	Chabur	Charless Trees	Line On As	
Configuration	RMS Enterprise Legacy Troller		The Office Files and includes	Jocacus	Disabled	Log On As	_ <u>-</u> -
🗉 🔮 Task Scheduler	Chart the exprise	Comine Hies	The Offline Files service performs mainten		Disabled	Local System	
Windows Firewall with Adva	Start the service	Performance Logs & Alerts	Performance Logs and Alerts Collects perf		Manual	Local Service	
Services		Plug and Play	Enables a computer to recognize and adap	Started	Automatic	Local System	
WML Control	Description:	PnP-X IP Bus Enumerator	The PnP-X bus enumerator service manag		Disabled	Local System	
Local Users and Groups	RMS Enterprise Legacy Troller Service	Portable Device Enumerator Service	Enforces group policy for removable mass		Manual	Local System	
E Storage		Spooler Spooler	Loads files to memory for later printing	Started	Automatic	Local System	
		Problem Reports and Solutions Control P	This service provides support for viewing,		Manual	Local System	
		Protected Storage	Provides protected storage for sensitive d		Manual	Local System	
		Remote Access Auto Connection Manager	Creates a connection to a remote network				
		Remote Access Connection Manager	Manages dial-up and virtual private netwo	Log O	n As needs to	be changed	
		Remote Procedure Call (RPC)	Serves as the endpoint mapper and COM	from	"Local System	" to a valid	6
		Remote Procedure Call (RPC) Locator	Manages the RPC name service database.		User account	name	b
		Remote Registry	Enables remote users to modify registry s	30000		$ \frown $	
		Resultant Set of Policy Provider	Provides a network service that processes		Manual	Local John	
		RMS Enterprise Legacy Troller	RMS Enterprise Legacy Troller Service		Automatic	Local System	
		Routing and Remote Access	Offers routing services to businesses in lo		Disabled	Local System	
		Secondary Logon	Enables starting processes under alternat	Started	Automatic	Local System	
		Secure Socket Tunneling Protocol Service	Provides support for the Secure Socket Tu	Started	Manual	Local Service	
		Security Accounts Manager	The startup of this service signals other se	Started	Automatic	Local System	
		Server	Supports file, print, and named-pipe shari	Started	Automatic	Local System	
		Shell Hardware Detection	Provides notifications for AutoPlay hardwa	Started	Automatic	Local System	
		SL UI Notification Service	Provides Software Licensing activation an		Manual	Local Service	
		Smart Card	Manages access to smart cards read by th		Manual	Local Service	
		Smart Card Removal Policy	Allows the system to be configured to lock		Manual	Local System	
		SNMP Trap	Receives trap messages generated by loc		Manual	Local Service	
		Software Licensing	Enables the download installation and enf	Started	Automatic	Network Service	
		Special Administration Concole Helper	Allows administrators to remotely access a	Jancoa	Manual	Local System	· 📰
		SSDP Discovery	Discovers networked devices and convisor		Disabled	Local Service	
		C Superface	Maintaing and improved devices and services		Disabled	Local Surface	
		Contract Notification Constant	Manhan s and improves system performan	Charles d	Lisabied	Local System	
		System Event Notrication Service	monitors system events and notifies subsc	Started	Aucomatic	Local System	_
		Mag Lask Scheduler	Enables a user to configure and schedule	started	Automatic	Local System	-
	1	•					,

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):

RMS Enterprise Legacy Troller Propertie	
General Log On Recovery Depender Log on as: C Local System account	Enter the RMS Service Account information here (see "Configuring the RMS Service Account")
Alaw service to interact with deskto This account Armsservice Password:	Browse
Confirm password:	ions.
You can enable or disable this service for the Hardware Profile Undocked Profile	he hardware profiles listed below: Service Enabled
Troubleshooting using hardware profiles.	Enable Disable
OK	Cancel Apply

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):

Server Manager (WIN2008ENSRV)	Services						
🗉 📄 Roles	A constant						
🖲 💑 Features	Services						
Diagnostics		Name +	Description	Chabur	Charlen Turns	1 100 00 40	
Configuration	RMS Enterprise Legacy Troller		The offer states in the state	Jocacus	Startup Type	Log On As	
Task Scheduler	Shad the service	Offine Hies	The Offline Hies service performs mainten		Disabled	Local System	
Windows Firewall with Adva	Start the service	Performance Logs & Alerts	Performance Logs and Alerts Collects perf		Manual	Local Service	
Services		Plug and Play	Enables a computer to recognize and adapt t	o hardware	changes with little	or no user input. St	opping
MMI Control	Description:	PnP-X IP Bus Enumerator	The PnP-X bus enumerator service manag		Disabled	Local System	
E Local Users and Groups	RMS Enterprise Legacy Troller Service	Portable Device Enumerator Service	Enforces group policy for removable mass		Manual	Local System	
🗉 🔚 Storage		Print Spooler	Loads files to memory for later printing	Started	Automatic	Local System	
		Solutions Control P	This service provides support for viewing,		Manual	Local System	
		A Protected Storage	Provides protected storage for sensitive d		Manual	Local System	
		Remote Access Auto Connection Manager	Creates a connection to a remote network		Manual	Local System	
		Remote Access Connection Manager	Manages dial-up and virtual private netwo	Started	Manual	Local System	
		Remote Procedure Call (RPC)	Serves as the endpoint mapper and COM	Started	Automatic	Network Service	
		🧟 Remote Procedure Call (RPC) Locator	Manages the RPC name service database.		Manual	Network Service	
		Remote Registry	Enables remote users to modify registry s	Started	Automatic	Local Service	
		Resultant Set of Policy Provider	Provides a network service that processes		Manual	Local System	
		RMS Enterprise Legacy Troller	RMS Enterprise Legacy Troller Service		Automatic	.\rmsservice	
		Routing and Remote Access	Offers routing services to businesses in lo		Disabled	Local System	
		Secondary Logon	Enables starting processes under alternat	Started	Automatic	Local System	
		Secure Socket Tunneling Protocol Service	Provides support for the Secure Socket Tu	Started	Manual	Local Service	
		Security Accounts Manager	The startup of this service signals other se	Started	Automatic	Local System	
		Server	Supports file, print, and named-pipe shari	Started	Automatic	Local System	
		Shell Hardware Detection	Provides notifications for AutoPlay hardwa	Started	Automatic	Local System	
		SL UI Notification Service	Provides Software Licensing activation an		Manual	Local Service	
		Smart Card	Manages access to smart cards read by th		Manual	Local Service	
		Smart Card Removal Policy	Allows the system to be configured to lock.		Manual	Local System	
		SNMP Tran	Receives trap messages generated by loc		Manual	Local Service	
		Software Licensing	Enables the download installation and enf	Started	Automatic	Network Service	
		Special Administration Concole Helper	Allows administrators to remotely access a	Startea	Manual	Local System	
		SSDD Discovery	Discovers networked devices and services		Dicabled	Local Service	
		S narfatch	Maintaine and improved custom performen		Dicabled	Local System	
		Surban Eucek NabiBastico Service	Maniform and improves system performan	Started	Automotic	Local System	
		Task Cabad day	monitors system events and notifies subsc	Started	Automatic	Local System	_
		wig Lask scheduler	chaptes a user to configure and schedule	started	Automatic	Local System	_ _
		•					

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):

Management Reports Configuration Help					
Configure Locations/Clients	Asset Management				
Client Gateways	Assets				
Locations	Control Macros				
User & Notification Managem	ent				
Users					
Roles					
Notification Rules					

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):

cations			-				Search	
Add	Edit	Delete	Send Mes	sage To	Servio	e Requests		
cation Nar	ne	A Classi	fication	Occupa	ncy	In Maintenance	Group	

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):

Location			Back to Location Management
Settings Mo	etadata Service Requests		
Name	Panasonic_Projector_R4_1_Client	Occupancy 0	
Description		P Select a Resource Profile to map to this Location. The list of Resource Profiles in this drop-down menu is	Open
Group	All Groups V	wei wei	Open
Owner		Configuration application.	
Classification	Platinum 🗸 💌	Scheduling Configuration	
Locale	Please select a locale	Resource Profile Conf Rm 1	· ·

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:

AMX .	RMS Scheduling Configuration		
RMS Server Scheduling Plugins Resource Profiles			
RMS Enterprise will retrieve resource profiles for the current	registered external scheduling server.		
Double click the 'Resource Name' field to change the name RMS. The 'Mapped' field indicates whether the resouce prot	Check the 'Use in RMS' field if you want this resource to be used i ie is already mapped to a location in RMS Server.	in	
Resource Name (Exchange Server)	Use In RMS Mapped		
Classroom Tokyo			
Classroom Wellington			
Conf Rm 1	(V) V		
Conf Rm 2	प		
Conf Rm 3	N		
Conf Rm 4	N		
Conf Rm 5	N		
Conf Rm 6			
Conf Rm 7			
Conf Rm 8			
Conf Rm 9			
Keypad 1			
Keypad 2			
	Re-Sync Scheduling Server Save		

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):

Hotlist					
0 5 40	Columns	•			Search
Status	Occurrence 1 V	Classification	Location	Asset	Summary
Ø	2:30 PM CST				The troller process "WIN-2012- STANDA", running at "192.168.214.50", has encountered a scheduling error. Please check the scheduling provider and verify the RMS Legacy Troller configuration settings.

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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