EMS Room Wizard Integration

Installation & Configuration Guide

V44.1

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CHAPTER 1: Introduction to Integration to RoomWizard

The Integration to RoomWizard is an optional module for communicating room reservation information between EMS and Steelcase RoomWizard. A RoomWizard is a wall-mounted unit that is associated with a particular room and used to schedule and view events in it.

How it Works

Once a connection has been established between a specific unit and an EMS database, EMS booking information is automatically displayed on the RoomWizard device for that room. In addition, new impromptu meetings and adjustments to existing meetings made directly on a RoomWizard unit are automatically relayed to the EMS database.

How Do I Install It?

To integrate EMS with Steelcase RoomWizard, you will:

- Obtain the Installation Files
- Install the EMS - RoomWizard Interface
- Install EMS - RoomWizard Interface Website
- Configure the EMS RoomWizard Interface
- Configure Steelcase RoomWizard

The EMS Integration to RoomWizard Guide leads you through the steps to install and configure the EMS RoomWizard interface for older and newer generation RoomWizard devices.

See Also: System Requirements

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CHAPTER 2: System Requirements

The EMS RoomWizard Interface website is typically installed on the server that hosts your EMS Web App site.

- **Valid EMS RoomWizard Interface License**
  You must be licensed for the EMS RoomWizard Interface in order to configure and use this module. If you are uncertain if your organization is licensed, or if you would like to learn more about it, please contact your Account Executive.
- **RoomWizard Unit(s) Installed/Operational**
  RoomWizard unit(s) must be installed and functional. This can be verified by opening a browser and entering the RoomWizard URL for a specific room (typically http://[RoomWizardIPAddress]/RoomHomePage).

See Also: EMS V44.1 System Requirements

CHAPTER 3: Obtain the Installation Files

Please contact Customer Support (or a member of the Professional Services group if you are working with one) to obtain the following components:

- **EMSMaster_Install.sql** – SQL script that will need to be executed against your EMS_Master database (for new installs and upgrades.)
- **EMS_Install.sql** – SQL script that will need to be executed against your EMS database (for new installs and upgrades.)
- **EMSRoomWizard.msi** – Installation file for the EMS-RoomWizard Interface website required to configure your EMS-RoomWizard connection/settings.

Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

Important!

If you do not have a customer login, register here.

CHAPTER 4: Install the EMS – RoomWizard Interface

1. Obtain the **EMS_Install.sql** AND the **EMSMaster_Install.sql** scripts.
2. Open Microsoft SQL Server Management Studio.
3. Within Microsoft SQL Server Management Studio, select **File** > **Open** > **File…** and locate **EMSMaster_ Install.sql**.
4. Select your EMS_Master database and execute the query (**Query** > **Execute**). When query execution has completed, a 'Command(s) completed successfully' message will display in the Results section.
5. Within Microsoft SQL Server Management Studio, select **File** > **Open** > **File…** and locate **EMS_ Install.sql**.
6. Select your EMS database and execute the query (**Query** > **Execute**). When query execution has completed, a 'Command(s) completed successfully' message will display in the Results section.

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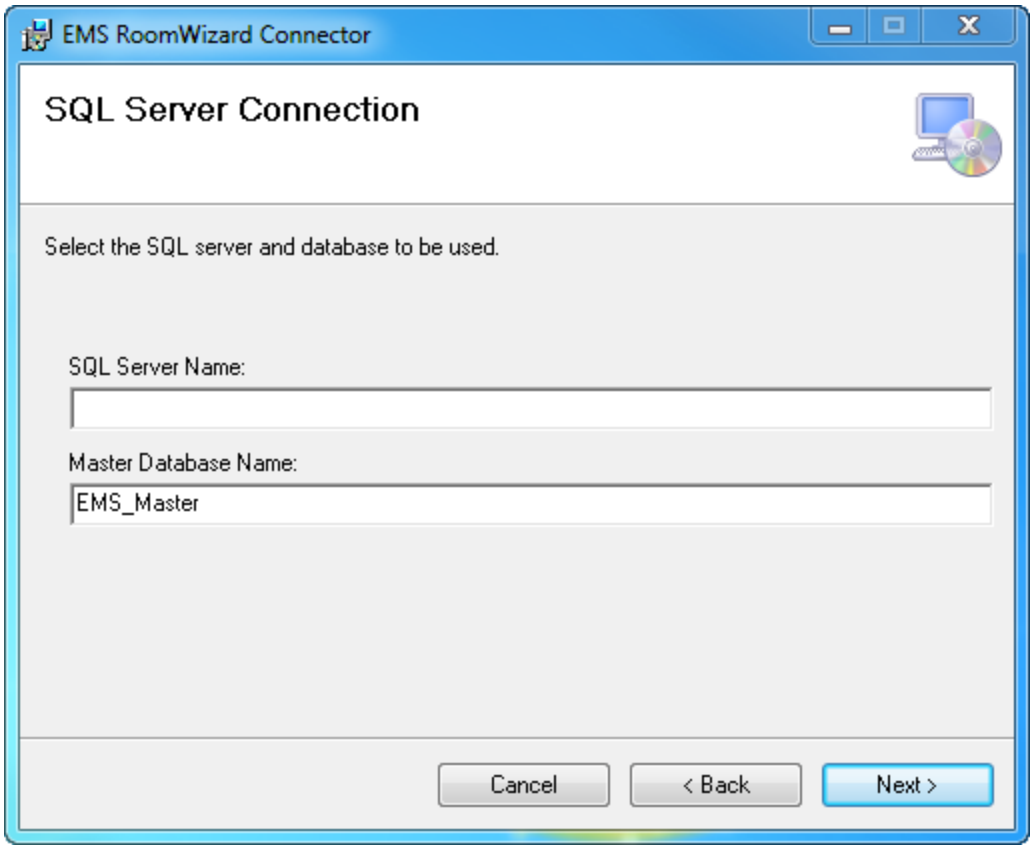
CHAPTER 5: Install EMS – RoomWizard Interface Website

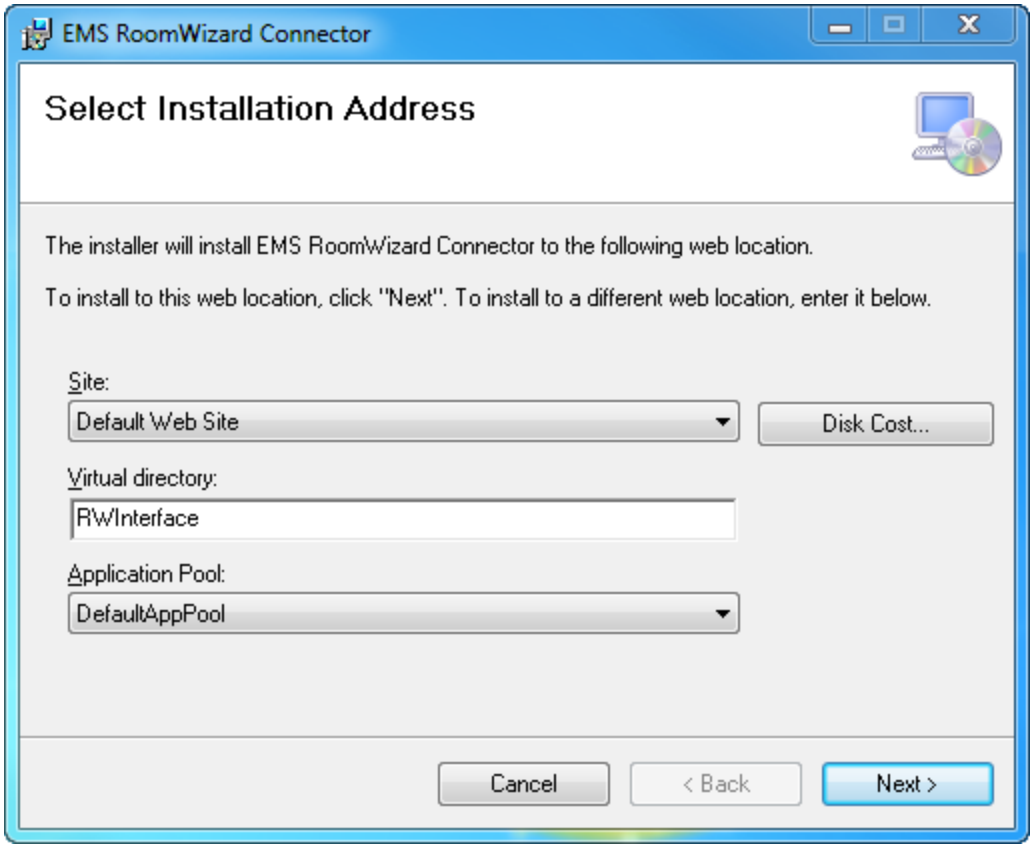
Note:
Existing copies of the EMS Integration to RoomWizard must be manually uninstalled.

1. Download the **EMSRoomWizard.msi** file onto the server that will be running the web site. This can be your existing VEMS or EMS Web App web server.
2. Run **EMSRoomWizard.msi**.
3. The first screen welcomes you to the EMS RoomWizard Connector Setup Wizard. Click **Next** to begin the installation process. The SQL Server Connection screen will appear.



4. Enter your EMS **SQL Server Name**.
5. Only change the EMS **Master Database Name** (EMS_Master) if you are running an older version of EMS (Enterprise 4x/Professional 10x/Lite 6x or older).

6. Click **Next**. The Select Installation Address screen will appear.



7. Select the **Site**, **Virtual Directory**, and **Application Pool**. (It is recommended that you keep the default settings.) The installation process will create a Physical and Virtual directory on your web server named 'RWInterface' (or whatever value you entered in the Virtual Directory field.) Click **Next**.
8. The Confirm Installation screen appears. Click **Next**.
9. The Installation Complete screen appears. Click **Close**.
10. After following the steps above, verify your installation by opening a browser and entering the following:
    http://[ServerName]/RWInterface (replace [ServerName] with the name of your web server)
11. The Registration screen will appear if you are using the EMS-RoomWizard Interface for the first time. Please enter your license information and click the **Save License Data** button. You are ready to begin the configuration process.

CHAPTER 6: Configure the EMS RoomWizard Interface

Establishing a connection between a RoomWizard unit and its associated room in an EMS database is comprised of multiple steps involving the EMS-RoomWizard Interface site and the RoomWizard Setup site.

This topic provides information about the following:

- Configuration Overview
- Configure EMS Database Settings
- Configure EMS Rooms

Configuration Overview

After you have installed and registered the EMS-RoomWizard Interface site, you must create connections between your RoomWizard unit(s) and the EMS database(s) with which they will communicate. This also includes the process of setting various configuration options (e.g. statuses, reservation defaults, etc.) per EMS database.

Once a connection to an EMS database has been established/configured, specific EMS rooms containing a RoomWizard unit must be identified. A RoomWizard Room ID is generated for each specific room identified. This ID is required when configuring a room's RoomWizard device to communicate to that room in the EMS database.

The final step is to configure RoomWizard itself via the RoomWizard Setup site. This includes providing a URL to the EMS-RoomWizard Interface, specifying the Room ID generated above, and configuring various Front Panel settings (e.g. display Host name, enable Start button, etc.).

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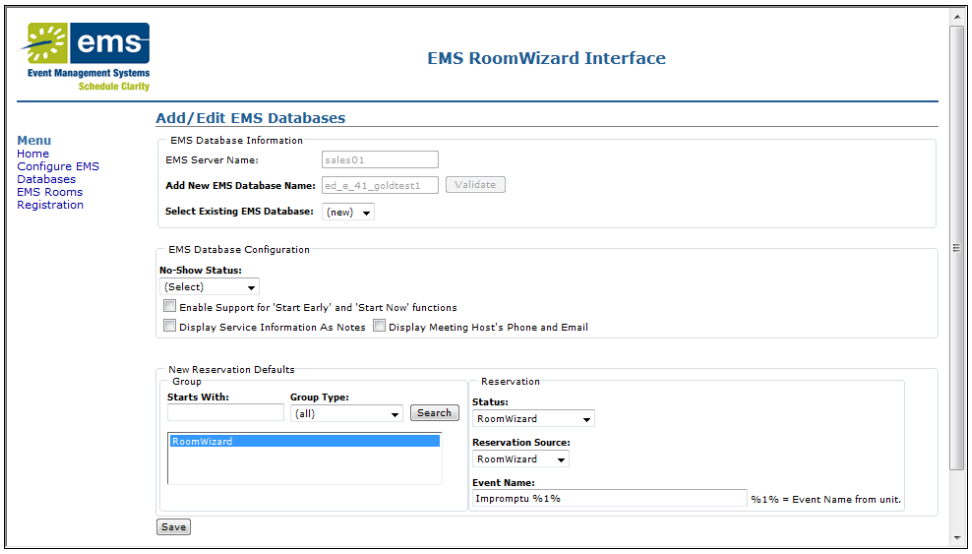
Configure EMS Database Settings

1. Open a browser, and launch the EMS-Room-Wizard Interface.
2. Click the **Configure EMS Databases** link.



3. To add/configure a new EMS database, enter the database name in the **Add New EMS Database Name** field and click the **Validate** button. To edit settings for an EMS database that was previously added, select the database in the Select Existing EMS Database dropdown.
4. In the EMS Database Configuration section, configure the following:
   - **No-Show Status** – RoomWizard 'Start Now' function must be activated. If enabled, a user's booking will be canceled (i.e. set to the status specified here) if the RoomWizard unit's Start button has not been pushed within a configurable amount of time. See EMS – RoomWizard Functionality Overview for more information.
   - **Enable Support for 'Start Early' and 'Start Now' functions** – Only check this setting if you are using the RoomWizard Start Early and/or Start Now feature. See EMS – RoomWizard Functionality Overview for more information.
   - **Display Service Information as Notes** – If enabled, EMS service orders will display in the Notes area under the meeting Details section.
   - **Display Meeting Host's Phone and Email** – RoomWizard must be configured to display host information. See EMS – RoomWizard Functionality Overview for more information.
5. The New Reservation Defaults section requires the RoomWizard **'Use Now'** function to be activated. See EMS – RoomWizard Functionality Overview for more information.
   - **Group** – EMS Group (e.g. client, employee, etc.) used to book a new reservation in the EMS database. To search for a specific Group, you may enter a value in the Starts With field and click the **Search** button. For newer generation RoomWizard devices, if a user enters information into the First and Last Name fields on the RoomWizard device, a temporary contact will be created

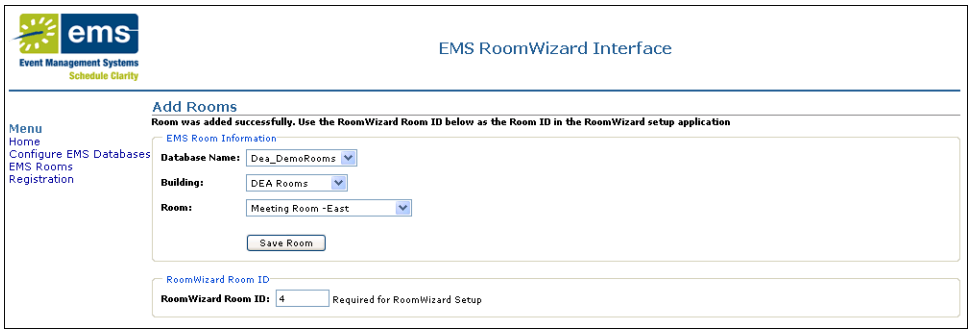
for the reservation under the Group specified in this section.

- **Status** – EMS Status used to book a new reservation.
- **Reservation Source** – EMS Reservation Source used to book a new reservation.
- **Event Name** – EMS Event Name used to book a new reservation. For newer generation RoomWizard devices, to pass-through the event name inputted on the device directly by the user, use the %1% variable.

6. Click the **Update** button to save your settings.

Configure EMS Rooms

1. Click the **EMS Rooms** link. A list of previously added Rooms will appear.
2. To add an EMS Room, click the **Add Room** button.
3. Select the EMS **Database Name**.
4. Select the **Building** and **Room**.
5. Click the **Save Room Button**. A RoomWizard Room ID will be generated in the RoomWizard Room ID field.



6. Repeat Step 4 and Step 5 to add more rooms. Click the **EMS Rooms** link when finished to view your list of rooms.

CHAPTER 7: Data Transferred Between Units and the Interface

This topic provides information about the following:

- get_booking
- add_booking
- edit_booking

get_booking

The following fields are transferred from EMS to the RoomWizard unit for event display:

RoomWizard API Field	EMS Field	Notes
booking_id	Booking ID	
purpose	Booking Event Name	
notes	Service Order Information	When enabled RoomWizard notes are compiled to include Setup Type, Setup Count, Service Order Name, and Service Order Start Time
start_time		
start_date		
end_time		
end_date		
booking_ creation_time		
booking_ creation_date		
booking_ modification_ time		

RoomWizard API Field	EMS Field	Notes
booking_ modification_ date		
name	Group Name or "In Use"	Events originating in EMS will display the Group Name
email	Group Email	
phone	Group Phone	

add_booking

The following fields are transferred from the RoomWizard unit to EMS and used to create a new Event:

- start_date
- start_time
- end_date
- end_date
- host
  - If the user inputs a Host name from the RoomWizard unit EMS uses that input as the Temp Contact Description of the reserving group configured in the EMS-ROOMWIZARD Interface.
- Purpose
  - If the user inputs a Purpose from the RoomWizard unit EMS uses that input as the Event Name.
  - RoomWizard input can be configured, from the EMS-ROOMWIZARD Interface, to be appended to a static Event Name used for all events added from a RoomWizard unit.
- room_id
  - The ID Specific to the RoomWizard unit.
  - Converted to an EMS Room ID before sending to the database

edit_booking

The following fields are transferred from the RoomWizard unit to EMS and processed based on the type of operation:

- new_start_date
- new_start_time
- new_end_date
- new_end_time
- booking_id
    - The EMS Booking ID for the Event.
    - Originally sent to the RoomWizard unit as part of the 'get_bookings' call

CHAPTER 8: Room Wizard Communication

Communication Overview

The RoomWizard unit is the initiator of all communication.

Using HTTP and URL query string parameters the RoomWizard unit makes specific requests (using GET) to the EMS RW-Interface which proved an immediate response in an XML format defined by the RoomWizard API.

RoomWizard API Calls Used

The following requests (defined as part of the RoomWizard API) are honored by the EMS-ROOMWIZARD Interface with a summary of the EMS-ROOMWIZARD Interface response:

- **about_connector**
  - Provides the RoomWizard unit with basic information about the EMS-ROOMWIZARD Interface including the interface version and what versions of the RoomWizard API that are supported.
- **get_booking**
  - Provides a list of the day's events to the RoomWizard unit including (depending on configuration settings) Event Name, Group Name, Group Phone, Group Email Address, and setup information.
- **Add_booking**
  - Provides a method for information sent from the RoomWizard unit (Host, Purpose, and Times) and used to create EMS Events.
- **edit_booking**
  - Provides methods for the RoomWizard unit to initiate the Edit/Cancelation of EMS Bookings.
  - Returns success or failure.

CHAPTER 9: Security Considerations

Transport Security

The RoomWizard units can be configured to communicate with the EMS-ROOMWIZARD Interface using SSL.

Private Events

EMS Events that are considered not 'Display on Web' are treated as private events with respect to the RoomWizard unit. If an EMS Event meets any of the below criteria the event will be considered private and will display on the unit with a Purpose (Event Name) of 'Private'.

Criteria for Private Events:

- Booked Room is not 'Display On Web'
- Booking Status is not 'Display On Web'
- Booking Event Type is not 'Display on Web'

CHAPTER 10: Configure Steelcase RoomWizard

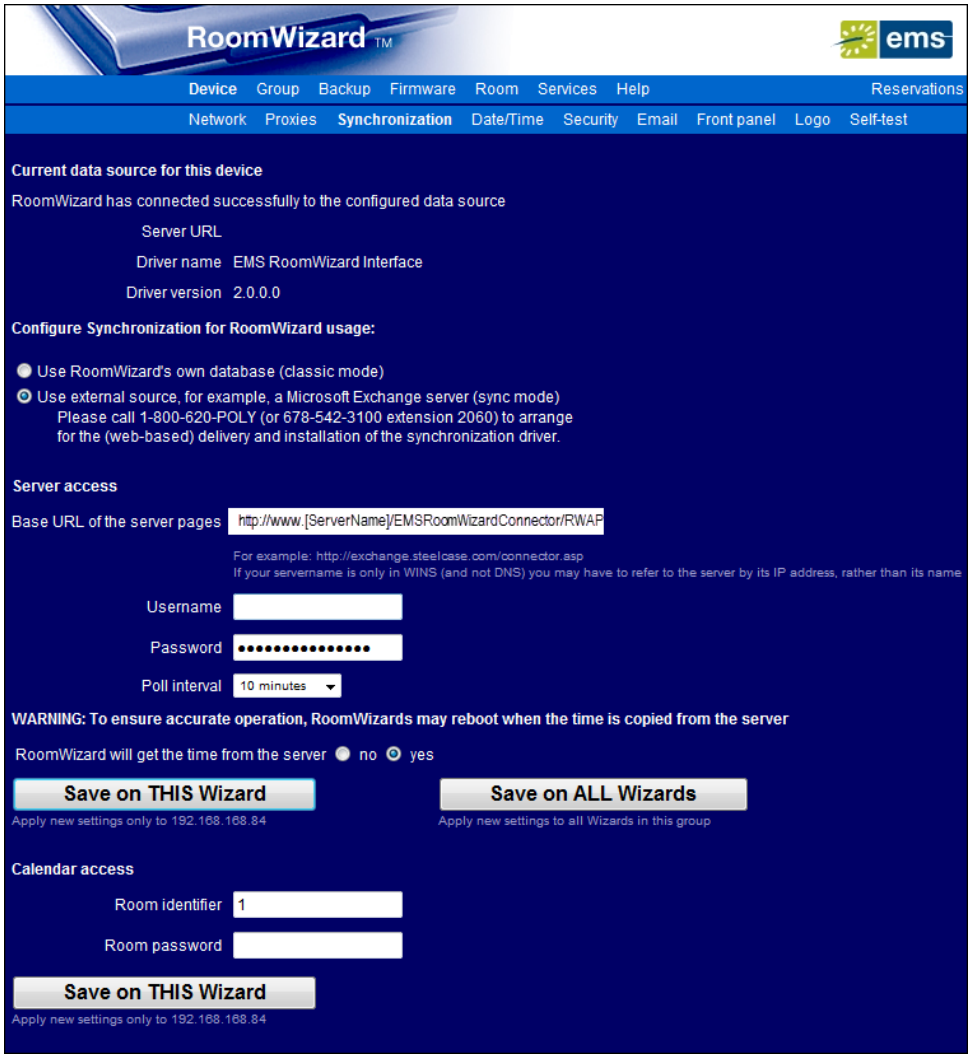
This topic provides information about the following:

- Configure the RoomWizard Setup Site for EMS Synchronization
- EMS RoomWizard Functionality Overview
  - RoomWizard Free/Busy Grid
  - RoomWizard Main Screen
  - RoomWizard Meeting Details
  - RoomWizard Use Now Function
  - RoomWizard End Function
  - RoomWizard Adjust Function
  - RoomWizard Start Now Function
  - RoomWizard Start Early Function
  - RoomWizard Room Information

Configure the RoomWizard Setup Site for EMS Synchronization

1. Open a browser and launch the RoomWizard Setup.
   (typically http://[RoomWizardIPAddress]/admin/sign/DeviceNetwork)

2. Go to the Device–Synchronization area.



Device Synchronization Area of the RoomWizard Setup Site

3. Select the **Use external source…** option.
4. In the Base URL of the server pages field, enter the path to the **RWAPI.aspx** page for your EMS-RoomWizard Interface web site. For example: **http://www.[ServerName]/EMSRoomWizardConnector/RWAPI.aspx** (replace [ServerName] with the name of your web server)

5. Enter the **Poll interval**. This setting determines how frequently the RoomWizard unit will check the EMS database for new bookings to display on the free/busy grid. To prevent any potential performance impacts on your EMS database, it is recommended that you set this interval to 10 minutes. You may adjust this setting based internal performance testing results if necessary.

6. If you have multiple RoomWizard units, you can click the **Save on ALL Wizards** button to use the above settings for all of your devices.
7. To link this specific RoomWizard unit to a specific EMS room, input the **RoomWizard Room ID** obtained in the Configuring EMS Rooms section above into the Room identifier field.
8. Click the **Save on THIS Wizard** button to save your RoomWizard Room ID.

EMS RoomWizard Functionality Overview

An explanation of general EMS related RoomWizard functionality and additional options is provided below. The following image displays the various settings available in the Device Front Panel area on the RoomWizard Setup site.

Device Front Panel Area of the RoomWizard Setup Site

The following provides information about areas of the RoomWizard screen and some of the RoomWizard functions:

- RoomWizard Free/Busy Grid
- RoomWizard Main Screen
- RoomWizard Meeting Details
- RoomWizard Use Now Function
- RoomWizard End Function
- RoomWizard Adjust Function
- RoomWizard Start Now Function
- RoomWizard Start Early Function
- RoomWizard Room Information

RoomWizard Free/Busy Grid

A room is considered 'busy' for a block of time if a meeting booked in a 'Book Space' Status Type exists in that room.

RoomWizard Main Screen

Meeting details will be displayed for all 'public' bookings (i.e. bookings where the Display on Web setting for the EMS Status, Event Type and Room are equal to 'True'). If a meeting is private, 'Private' will appear on the RoomWizard unit.

- **Host Name** – This option can be disabled on the RoomWizard Setup site in the Device–Front panel area by checking the **Do not display "Host" name when in Synchronized mode** option.
- **Event Name**
- **Event Start Time - Event End Time**

RoomWizard Meeting Details

- **Reservation** – Host name, booking Event Name
- **Created** – Booking Date Added
- **Modified** – Booking Date Changed
- **Email** – This option can be enabled on the EMS-RoomWizard Interface site in the Configure EMS Databases area by checking the **Display Meeting Host's Phone and Email** option.
- **Phone** – This option can be enabled on the EMS-RoomWizard Interface site in the Configure EMS Databases area by checking the **Display Meeting Host's Phone and Email** option. Phone appears under the Invitees area on the RoomWizard unit.

- **Notes** – An option to display Booking Service Orders can be enabled on the EMS-RoomWizard Interface site in the Configure EMS Databases area by checking the **Display Service Information as Notes** setting.

RoomWizard Use Now Function

This option can be disabled on the RoomWizard Setup site in the Device–Front panel area by checking **Disable "Use Now"** button. If enabled, a user can create a walk-up impromptu meeting on the RoomWizard unit using the settings specified on the EMS-RoomWizard Interface site in the Configure EMS Databases area. If the Start Now Function is enabled, "Local Reservation" will be concatenated to the end of the value specified in the Event Name field.

RoomWizard End Function

This option can be disabled on the RoomWizard Setup site in the Device–Front panel area by checking **Disable "End"** button. If enabled, a user can end their in-progress meeting. Ending a meeting adjusts the booking Event and Reservation end times to the current time.

RoomWizard Adjust Function

This option can be disabled on the RoomWizard Setup site in the Device–Front panel area by checking **Disable "Adjust"** button. If enabled, a user can adjust the end time of their in-progress meeting. The booking Event and Reservation end times are adjusted based on the user's selection.

RoomWizard Start Now Function

This option can be enabled on the RoomWizard Setup site in the Device–Front panel area by checking **Enable "Start"** button. If enabled, a user's booking will be canceled (i.e. set to the status specified in the EMS-RoomWizard Interface site in the Configure EMS Databases area) if the 'Start' button has not been pushed within the amount of time configured in RoomWizard's **Time limit for "Start"** button' setting.

RoomWizard Start Early Function

This option can be enabled on the RoomWizard Setup site in the Device–Front panel area by checking **Enable "Start Early"** button. If enabled, a user can start their booking early. The RoomWizard unit creates a new booking using the settings specified on the EMS-RoomWizard Interface site in the Configure EMS Databases area. "Start Early" will be concatenated to the end of the value specified in the Event Name field.

RoomWizard Room Information

Room information (e.g. Name, Capacity, Phone Number, etc.) is configured within the RoomWizard Setup site in the Room-Name/Location and Room-Facilities areas. This information cannot be pulled from the

EMS database.

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