accruent

# EMS Services and Components

## Installation & Configuration Guide

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# CHAPTER 1: Services and Components

This section discusses additional services and components offered by EMS Software. These services and components include:

- EMS Automated Report Service
- EMS Email Notification Service—This optional service notifies users via email of changes in the database.
- EMS Check-in Notification Service—This service automates the process of reminding users to check in and managing no-shows. You configure Check-in Notification rules based on rooms, statuses, event types, and/or group types.
- EMS Campus Auto Sync Service (EMS Campus Only)—This feature automates the process of allowing Domain Schedulers to manually process post-publish course changes made in your SIS to EMS.

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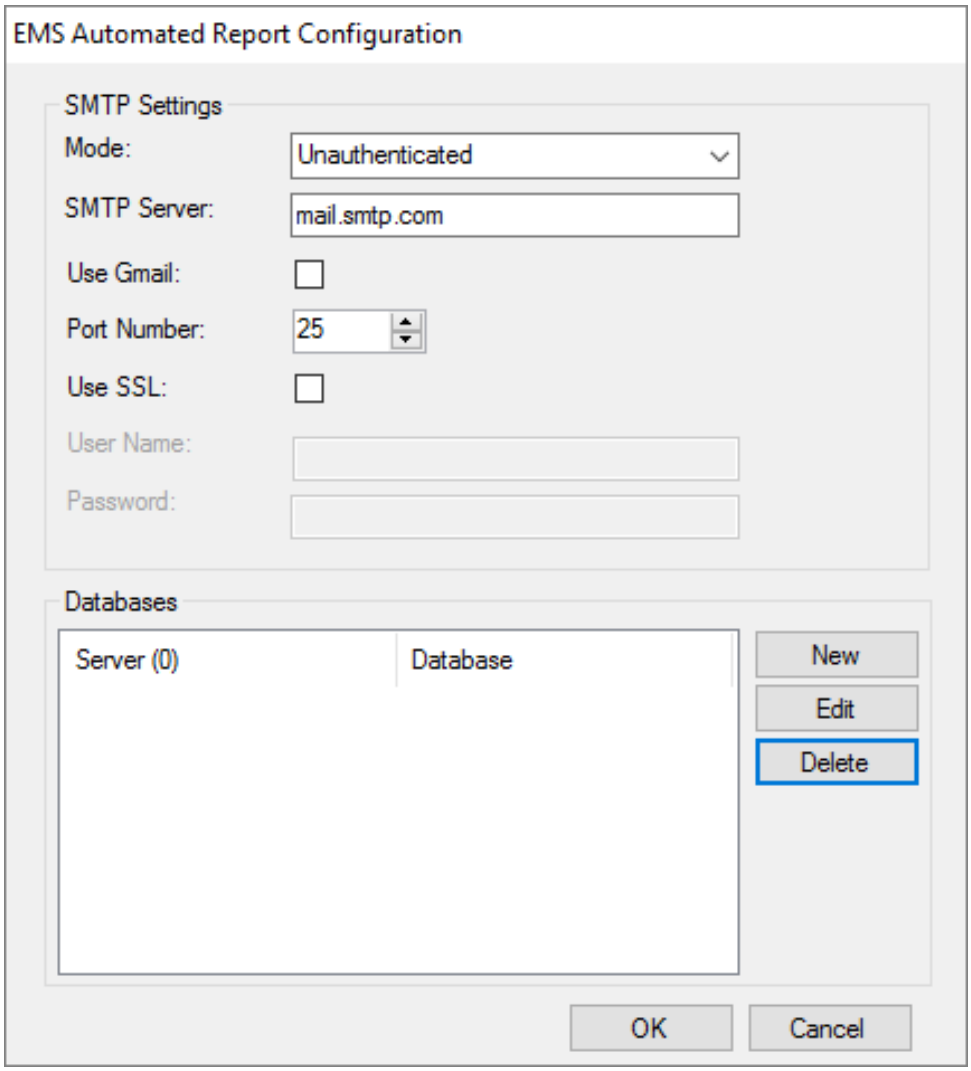
# CHAPTER 2: Install the EMS Automated Report Service

EMS has built-in functionality that will automatically email reports to users. To learn more about configuring automated reporting, see Configure Automated Reports in the EMS Desktop Client User Guide.

> **Note:**
> The EMS Automated Report Service must be installed on a computer that is connected to the network and is running 24 hours a day. Existing versions of the EMS Automated Report Service must be manually uninstalled. Install the EMS Automated Report Service on **one computer/server only**.

1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Automated Report Service.
3. Download the **EMSAutomatedReportsSetup.msi** onto the server that will be running the service.
4. Double-click **EMSAutomatedReportsSetup.msi**. Follow the on-screen prompts. It is recommended that you accept the defaults.
5. Within your Microsoft Windows Start menu, locate **EMS Automated Report**. The EMS Automated Report Configuration screen will appear.

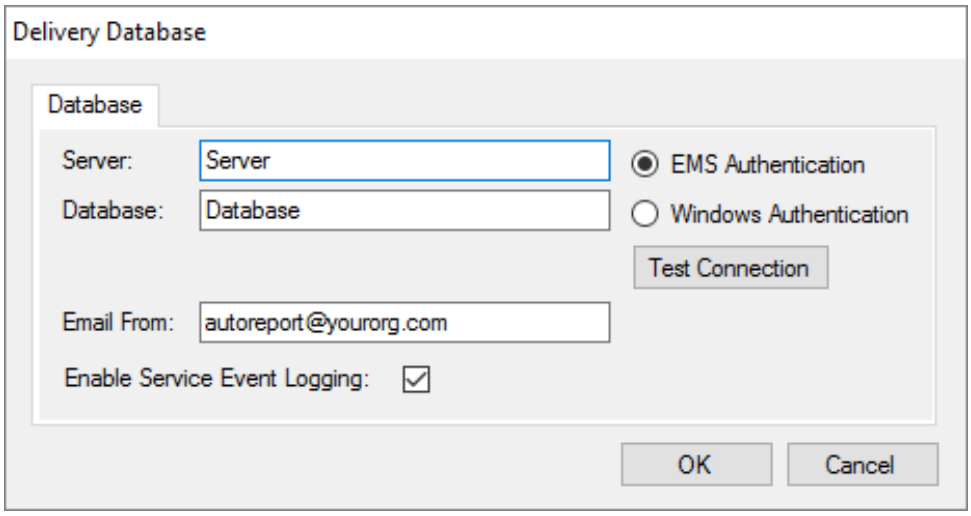



EMS Automated Report Configuration Screen

6. Review and complete/change the following settings:
   - **Mode** – Type of authentication to the SMTP server.
   - **SMTP Server** – SMTP server name or IP address.
   - **Use Gmail** – Check this option to set the service to use Gmail settings.
   - **Port Number** – SMTP port (default = 25)
   - **Use SSL** – Check this option if your SMTP server runs under SSL.

- **User Name/Password** – Required if an authentication mode other than Unauthenticated is selected.

7. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.




Delivery Database Dialog Box

8. On the Database tab of the Delivery Database dialog box, complete the following:
   - **Server/Database** – EMS server and database name.
   - **EMS Authentication/Windows Authentication** – The method of authentication to this database.
   - **Email From** –Email address that will be displayed in the From field of automated report emails that are sent.
   - **Enable Service Event Logging** – Activates Windows event logging.
9. After making your entries, click **OK**.
10. Click **OK** again to save your EMS Automated Report Service Configuration settings.

    The EMS Automated Report Service is now enabled.

**See Also:** Configure Automated Reports in the EMS Desktop Client User Guide.

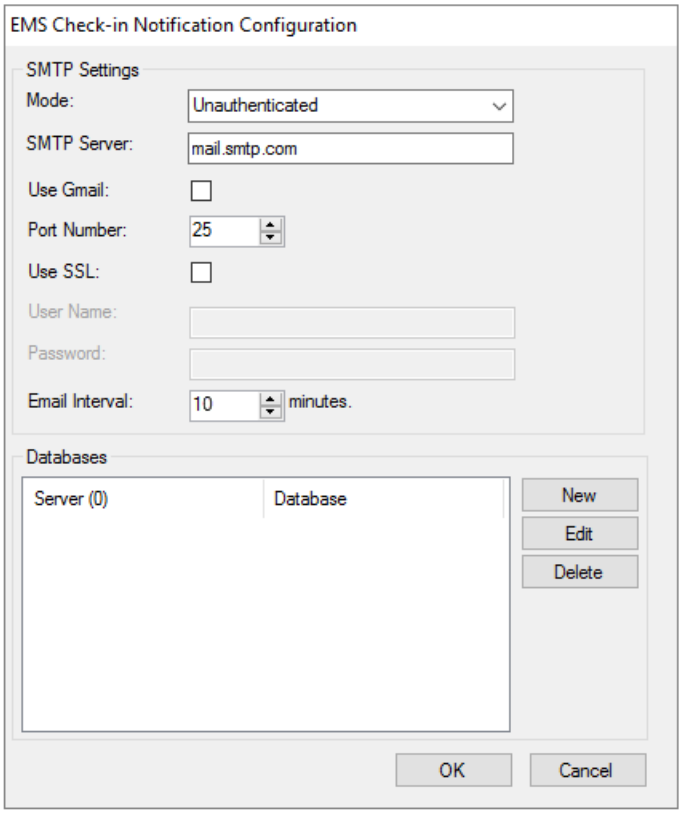
**Note:**

If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution or contact Customer Support.

# CHAPTER 3: Install the EMS Check-in Notification Service

To install the EMS Email Notification Service:

1. Verify that the prerequisite software is installed.
2. Download the **EMSCheckInNotificationSetup.msi** onto the server that will be running the service.
3. Double-click **EMSCheckInNotificationSetup.msi**. Follow the on-screen prompts. It is recommended that the defaults are accepted.
4. Within the Microsoft Windows Start menu, locate **EMS Check-in Notification Service**. The EMS Check-in Notification Configuration dialog will appear.

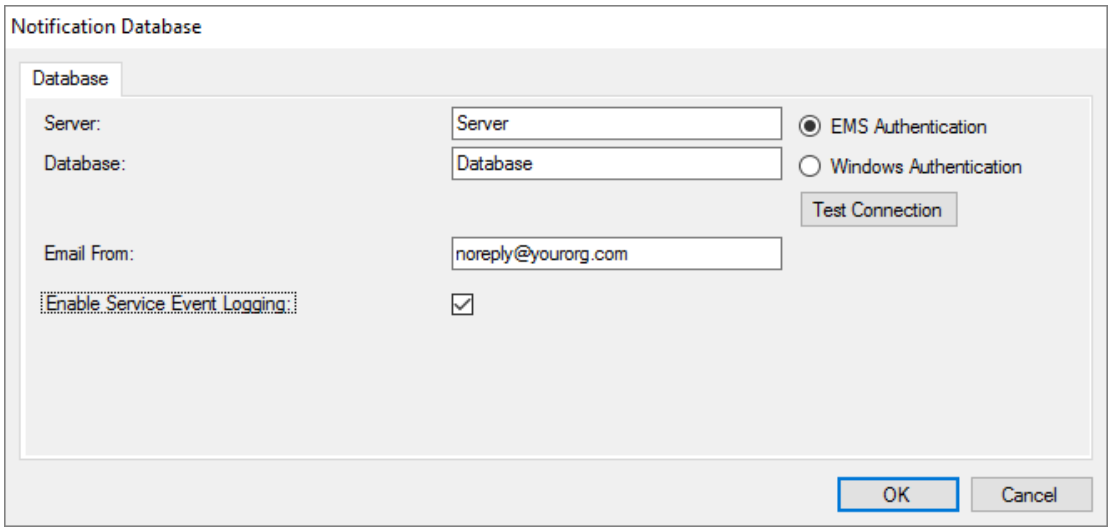



EMS Check-in Notification Configuration Dialog

5. Review and complete/change the following settings:
   - **Mode**—Type of authentication to the SMTP server.
   - **SMTP Server**—SMTP server name or IP address.

- **Use Gmail**—Check this box if the organization uses Gmail as their mail server.
- **Port Number**—SMTP port (default = 25)
- **Use SSL**—Check this option if your SMTP server runs under SSL.
- **User Name/Password**—Required if an authentication mode other than Unauthenticated is selected.
- **Email Interval**—The frequency with which the system will generate notification emails. If the interval is set to 0 minutes, the service will not function. The recommended interval is 10 to 15 minutes.

6. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.




Notification Database Dialog

7. On the **Database** tab of the Notification Database dialog box, complete the following:
   - **Server/Database**—EMS server and database name
   - **EMS Authentication/Windows Authentication**—The method of authentication to this database.
   - **Email From**—Email address that will be displayed in the From field of notification emails that are sent.
   - **Enable Service Event Logging**—Activates Windows event logging.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Check-in Notification Configuration settings.

> **Note:**
> If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution or contact Customer Support.

# CHAPTER 4: Install or Upgrade the EMS Email Notification Service

EMS has built-in functionality that alerts users of certain changes in the database. With the optional EMS Email Notification Service, users can also be notified via email. If email notification will not be used, there is no need to install the Email Notification Service. Standard notifications can still be generated and viewed by users who are logged into EMS.

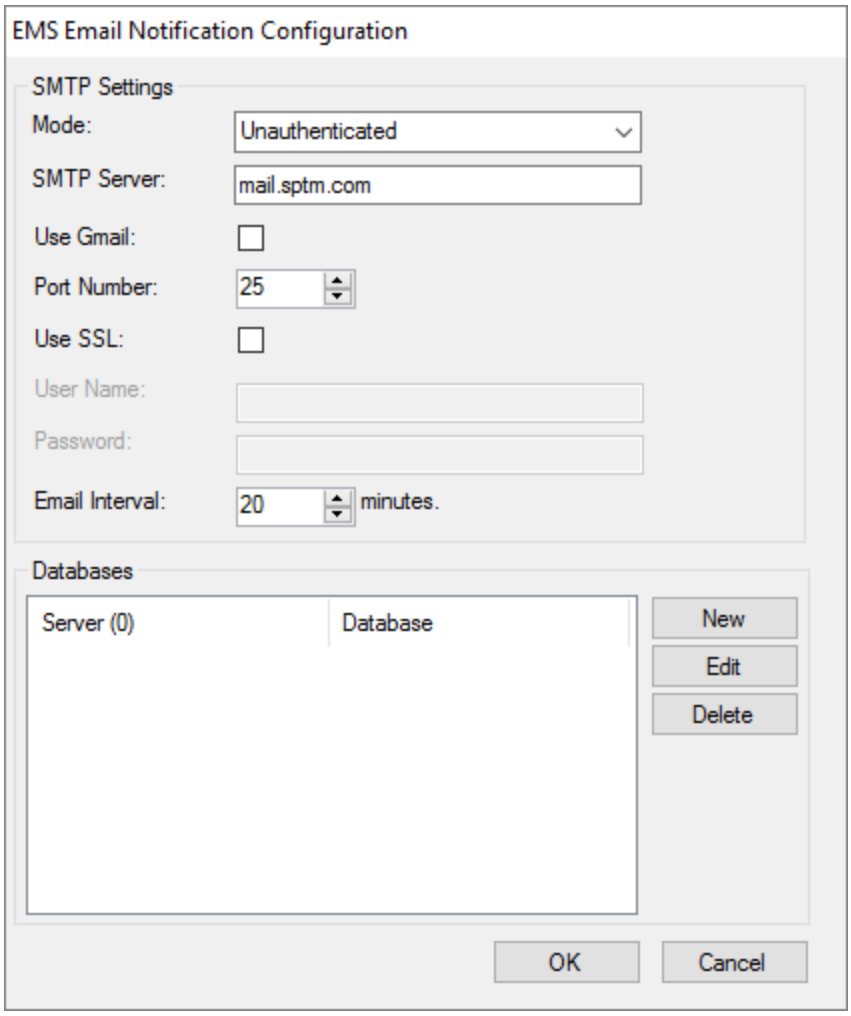
The EMS Email Notification Service must be installed on a computer that is connected to the network and is running 24 hours a day.

**Important!**

Existing versions of the EMS Email Notification Service must be manually uninstalled. Install the EMS Email Notification Service on **one computer/server only**.

1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Email Notification Service.
3. Download the **EMSEmailNotificationSetup.msi** onto the server that will be running the service.
4. Double-click **EMSEmailNotificationSetup.msi** and follow the on-screen prompts. It is recommended that you accept the defaults.
5. Within your Microsoft Windows Start menu, locate **EMS Email Notification**.

   The EMS Email Notification Configuration dialog will appear.



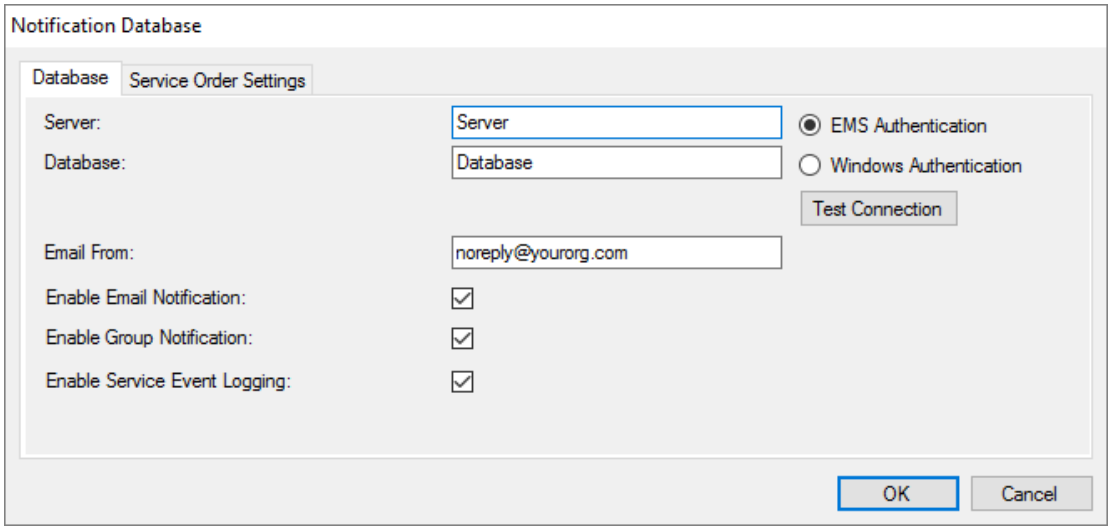

EMS Email Notification Configuration Dialog

6. Review and complete/change the following settings:
   - **Mode** – Type of authentication to the SMTP server.
   - **SMTP Server** – SMTP server name or IP address.
   - **Use Gmail** – Check this option to set the service to use Gmail settings.
   - **Port Number** – SMTP port (default = 25)
   - **Use SSL** – Check this option if your SMTP server runs under SSL.
   - **User Name/Password** – Required if an authentication mode other than Unauthenticated is

selected.

- **Email Interval** – The frequency with which the system will generate notification emails.

7. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database'). Select this entry, click **Edit**, and change the values to your EMS server and database name.




Notification Database Dialog

On the Database tab of the Notification Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Email From** – Email address that will be displayed in the From field of notification emails that are sent.
- **Enable Email Notification** – Activates email notifications.
- **Enable Group Notification** – Activates group notifications.
- **Enable Service Event Logging** – Activates Windows event logging.

Click the Service Order Settings tab and review/change the following:

- **Paper size** – The paper size for the PDF file that is emailed.
- **Highlight Days** – Number selected here determines the information that is highlighted on

service order PDFs.

- **Show Pricing** – Check if service orders should display pricing.
- **Show Notes** – Check if service orders should display resource notes.
- **Show Special Instructions** – Check if service orders should display resource special instructions.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Email Notification Configuration settings.

   The Email Notification Service is now enabled.

**See Also:** Configure Notification Rules and Configure Group Notification Rules in the EMS Desktop Client Configuration Guide for information on defining Notification Rules.

**Note:**

If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution or contact Customer Support.

# CHAPTER 5: Install or Upgrade the EMS Campus Auto Sync Service (EMS Campus Only)

Functionality exists within EMS Campus that allows Domain Schedulers to manually process post-publish course changes made in your SIS to EMS. The EMS Campus Auto Sync Service automates this process.

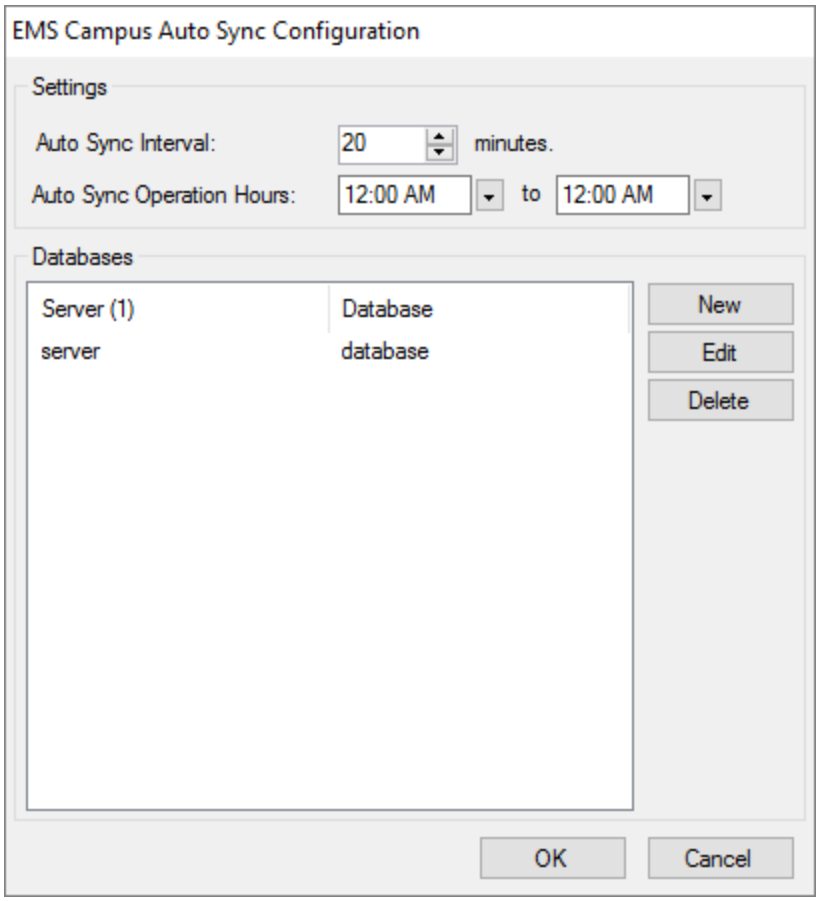
The EMS Campus Auto Sync Service must be installed on a computer/server that is connected to the network and is running 24 hours a day.

**Important!**

Existing versions of the EMS Campus Auto Sync Service must be manually uninstalled. Install the EMS Campus Auto Sync Service on **one computer/server only**.

To install the EMS Campus Auto Sync Service:

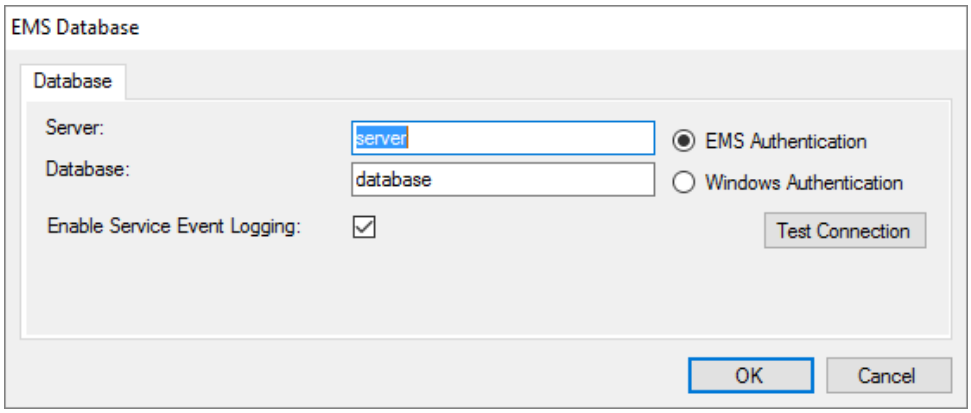
1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Campus Auto Sync Service.
3. Download the **EMSCampusAutoSyncSetup.msi** onto the server that will be running the service.
4. Double-click **EMSCampusAutoSyncSetup.msi**. Follow the on-screen prompts. It is recommended that you accept the defaults.
5. Within your Microsoft Windows Start menu, locate **EMS Campus Auto Sync**. The EMS Campus Auto Sync Configuration screen will appear.




EMS Campus Auto Sync Configuration Dialog

6. Set the **Auto Sync Interval**. The recommended setting for this value is at least 30 minutes. It is very important that EMS Campus Auto Sync has plenty of time to synchronize with the SIS and process any changes.

7. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.




EMS Database Dialog

On the Database tab of the Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Enable Service Event Logging** – Activates Windows event logging.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Campus Auto Sync Configuration settings.

   The EMS Campus Auto Sync Service is now enabled.

**See Also:** Post-Publish Processing of Courses in the Academic Planning User Guide and EMS System Parameters for All Applications in the EMS Desktop Client Configuration Guide for information on how to configure the auto sync feature.

**Note:**
If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution or contact Customer Support.

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