EMS Facility Management (FM) Toolkit Installation & Configuration Guides

V44.1

Last Updated: March 5, 2018
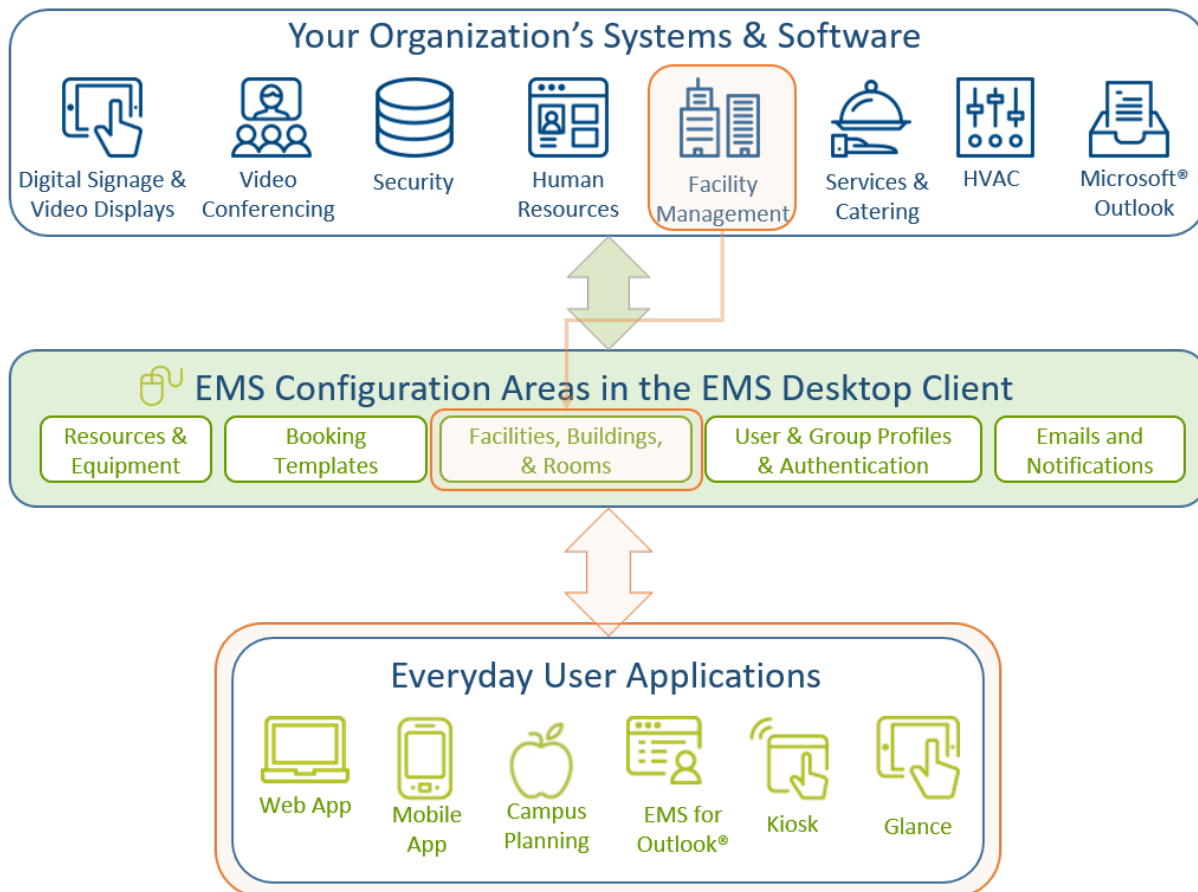
Table of Contents

CHAPTER 1: Introduction to Facility Management Toolkit

If your organization uses a Facilities Management (FM) System, facility information may already be maintained there. The EMS FM Toolkit eliminates the need for double entry of facility details and maintenance. Information is automatically updated in EMS to provide the highest level of accuracy and improved communication across departments. This toolkit synchronizes the inventory of space between your facility management systems and EMS to ensure cross-system accuracy. Both EMS and facilities management systems are built upon an inventory of buildings and rooms that forms the basis for meeting and event reservations. The FM Toolkit serves as the connection point between these two systems. The toolkit transfers chosen records to a staging database and updates the appropriate tables in EMS. As with the HR Toolkit, this automates the creation, maintenance, and inactivation of select Building and Room properties from an outside data source.

Integration Diagram
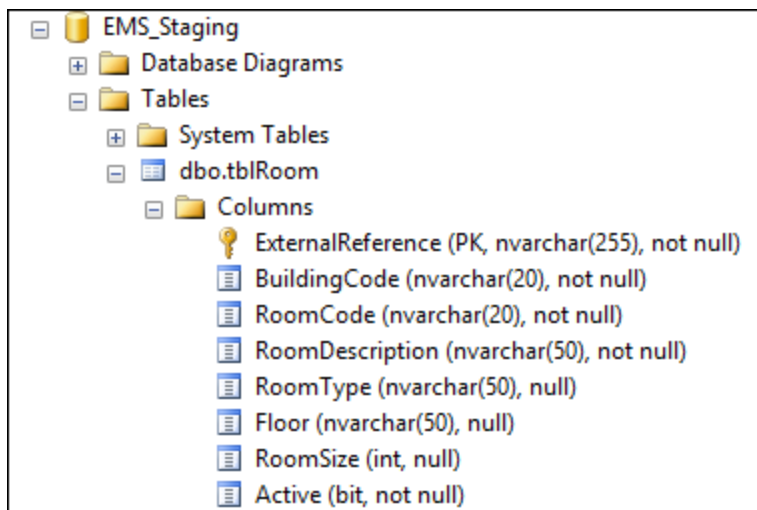
CHAPTER 2: How It Works

This topic provides information about the following:

EMS_STAGING DATABASE

The EMS_Staging database (created by **FMTK Staging DB Install.sql**) is used to stage room records before they are imported into EMS.

Once you have identified the FM data source within your organization that will be used to create and maintain your EMS room records, you will be required to define/create a process to import room records into the tblRoom table within EMS_Staging.

MAINTAIN ROOM RECORDS IN EMS

The FMTK_Update_Room stored procedure (created by **FMTK Update Script.sql**) contains all of the logic to create your EMS room data. Records are imported into EMS from the EMS_Staging database according to the specifications outlined in the table below:

EMS_STAGING.TBLROOM FIELD	EMS.TBLROOM FIELD	NOTES
ExternalReference	ExternalReference	**Required. Primary Key.** Unique identifier that links a room record in your FM system with a room record in EMS.
BuildingCode	BuildingID	BuildingCode is matched against *tblBuilding.BuildingCode* to derive the correct Building ID to be stored in *tblRoom.BuildingID*. If BuildingCode can't be matched in *tblBuilding*, the room record **WILL NOT** be created in EMS.
RoomCode	Room	**Required**

EMS_STAGING.TBLROOM FIELD	EMS.TBLROOM FIELD	NOTES
RoomDescription	Description	**Required**
RoomType	RoomType	RoomType is matched against *tblCategoryGroup.Description* (Room Type table) to derive the correct Room Type ID to be stored in *tblRoom.RoomType*. If the room type can't be matched in *tblCategoryGroup*, a new room type record WILL be created.
Floor	FloorID	Floor is matched against tblFloor.Description to derive the correct Floor ID to be stored in tblRoom.FloorID. If the floor can't be matched in tblFloor, a new floor record **WILL** be created.
RoomSize	RoomSize	Optional
Active	Active	Active = 1. Inactive = 0.

The FM Toolkit uses the *ExternalReference* field in *EMS_Staging.tblRoom* and the *tblRoom.ExternalReference* field in the EMS database to determine whether a record needs to be added, updated, or inactivated.

ADD NEW RECORDS IN EMS

Rooms: If the *ExternalReference* value in *EMS_Staging.tblRoom* is not found on an existing room record in EMS, a new room will be created.

> **IMPORTANT:** Existing EMS clients wanting to implement the FM Toolkit must "synchronize" existing EMS rooms before activating the toolkit by adding a valid ***ExternalReference*** value in ***tblRoom***. **Ignoring this step will result in duplicate records.**

Room Types: If the *RoomType* value in *EMS_Staging.tblRoom* is not found in the existing list of room types in EMS, a new room type will be created.

Floors: If the *Floor* value for a particular room record in *EMS_Staging.tblRoom* is not found in the existing list of floors in EMS, a new floor will be created.

Buildings: The FM Toolkit does not add or maintain building records in EMS.

UPDATES TO EXISTING RECORDS IN EMS

If the *ExternalReference* value in *EMS_Staging.tblRoom* is found on an existing room record in EMS, the room will be updated with any changes.

INACTIVE ROOM RECORDS

A room will be inactivated if one of the two conditions outlined below is met:

1. If an existing room record in EMS does not exist in *EMS_Staging.tblRoom* (based on *ExternalReference*).
2. If a room record's **Active** status in *EMS_Staging.tblRoom* = 0.

> **NOTE:** Room records within EMS with an empty External Reference field are excluded from processing. Therefore, rooms that are not included in your data feed can be added and maintained manually within EMS and will not be impacted by the FM Toolkit.

CHAPTER 3: Installation Overview

> **Note for EMS Cloud Services Customers:**
>
> The installation and updating information in this topic does not apply to
> EMS Cloud Services customers. For more information regarding the install-
> ation and updating of EMS software with Cloud Services, please refer to the
> [EMS Cloud Services documentation](#).

If you are unsure whether your organization is licensed for the FM Toolkit, or if
you would like to learn more about it, please contact your Account Executive.

To integrate EMS FM Toolkit, you will:

» Determine the data sources in your organization that will connect facilities man-
  agement data to EMS.

» Prepare your facilities management data for sharing with EMS.

» Obtain and load the installation components, which are .sql files to establish a data-
  base where data will be staged for exchange between EMS and your data source
  (s).

» Run FM Toolkit to initiate data exchange between EMS and your data source(s).

» Maintain data in your facilities management systems for continual integration with EMS.

HOW EMS INTEGRATES YOUR USER RECORDS

During the configuration process, you establish an inventory of buildings and rooms in the EMS staging database. Everyday users can then use this inventory of space to book meetings and reservations. Facilities management (FM) systems outside of EMS solutions are also built upon an inventory of buildings and rooms. The FM Toolkit enables organizations to synchronize the space inventory between these two systems.

The FM Toolkit Installation Guide leads you through the steps to install and configure the FM Toolkit in your environment, and explains special considerations for preparing and maintaining your source data.

CHAPTER 4: Obtain the Install-ation Files

Please contact your Professional Services Consultant to obtain the following components:

» **FMTK Staging DB Install.sql** – SQL file required to create the staging database – *EMS_Staging*.

» **FMTK Update Script.sql** – SQL file required to create the stored procedure *FMTK_Update_Rooms* within your EMS database.

CHAPTER 5: Install and Execute the Facility Management Toolkit

INSTALLATION

The followings steps should be performed on the MS SQL Server that hosts your EMS database.

1. Obtain the SQL files outlined in the Obtain the Installation Files section.
2. Using Microsoft SQL Server Management Studio execute the **FMTK Staging DB Install.sql** script against your **master** database. This will create the *EMS_ Staging database* containing one table named *tblRoom*.
3. Using Microsoft SQL Server Management Studio execute **the FMTK Update Script.sql** script against your **EMS** database. This will create a stored procedure in your EMS database named *FMTK_Update_Room*.

EXECUTION

1. Import records from your organization's facility management system into the *tblRoom* table within the *EMS_Staging* database.

> **IMPORTANT:** Existing EMS clients wanting to implement the FM Toolkit must "synchronize" existing EMS rooms before activating the toolkit by adding a valid *ExternalReference* value in *tblRoom*. Ignoring this step will result in duplicate records.

2. Using Microsoft SQL Server Management Studio execute the **FMTK_Update_Room** stored procedure.

> **NOTE:** Step 2 (and Step 1 with assistance from your IT Department) can be scheduled to execute automatically using a SQL Job. Please refer to your MS SQL Server documentation for more information on creating and scheduling a SQL Job.