EMS – Polycom Interface Installation Instructions

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Introduction

EMS clients use EMS for their facility scheduling needs along with Polycom RealPresence Resource Manager to manage their video communication systems. Polycom provides a 3rd Party Booking API that exposes Polycom RealPresence Resource Manager booking functionality to external scheduling systems like EMS. This document lists the steps you must take to install and configure the EMS interface to Polycom.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). Please contact Customer Support (or a member of the Client Services group if you are working with one) if you have any questions or encounter any issues installing or configuring the interface.

Email:	**support@dea.com**
Web:	**www.dea.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Important: Please note that support for the EMS – Polycom Interface extends only to installing the EMS components outlined below. Please consult your Polycom account manager for any questions or issues related to Polycom or the Polycom Realpresence Resource Manager API.

Hardware and Software Requirements

✓ **The latest version of EMS must be installed:**

- EMS Workplace 7.0 or higher
- EMS Campus 4.0 or higher
- EMS Enterprise 7.0 or higher
- EMS Legal 7.0 or higher
- EMS District 7.0 or higher

✓ **.NET Framework 3.5**

Application Architecture

The EMS – Polycom Interface is comprised of two components:

- **EMS – Polycom Service** – Windows service responsible for pushing videoconference bookings from EMS to the Polycom Realpresence Resource Manager API at timed intervals.
- **Polycom Activity DLL** – Custom Polycom DLL provided by EMS that will display all EMS – Polycom Interface activity within the EMS application including errors and successfully scheduled videoconferences. The Polycom Activity DLL also contains an area that allows EMS Administrators to configure various EMS – Polycom Interface settings.

New videoconferences booked in EMS are pushed to the Polycom Realpresence Resource Manager API based on various settings defined within EMS (see the *EMS – Polycom Interface Configuration Settings* section below.) Subsequent critical booking changes (i.e. date, time or location changes) and/or cancellations are also relayed to the API. The EMS – Polycom Interface is a one-way interface and changes made in Polycom will **not** be reflected in EMS.
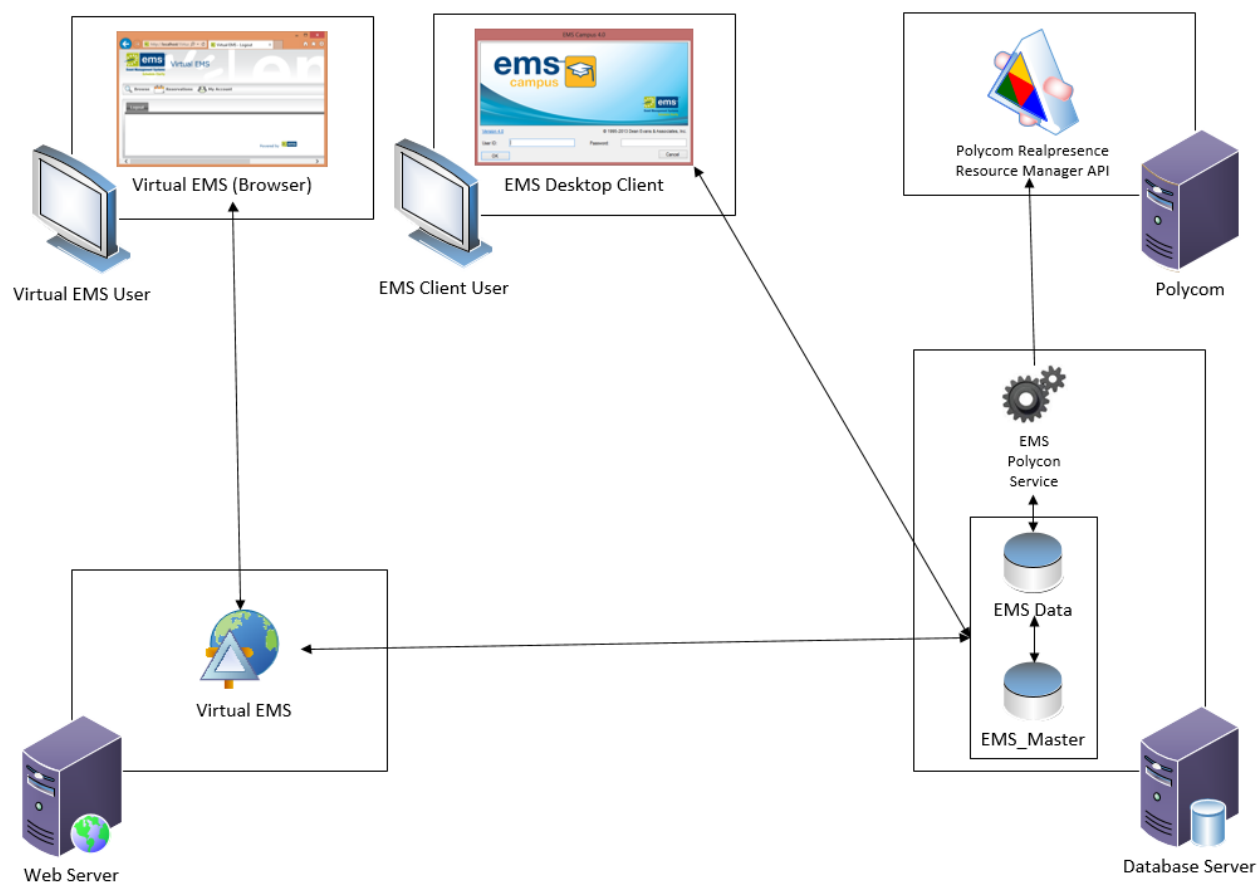
Please see the *Advanced EMS – Polycom Interface Configuration* section for information on exactly what data is transferred from EMS to the Polycom Realpresence Resource Manager API.

Obtaining the EMS – Polycom Interface Components

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

- **EMS License Key** – The EMS – Polycom Interface is an optional module that requires the appropriate EMS license to activate.

- **PolycomOverlay.sql** - SQL script that will need to be executed against your EMS database. This will create EMS – Polycom Interface specific objects (tables and stored procedures).
- **PolycomSetup.msi** – Service responsible for pushing videoconference bookings from EMS to the Polycom Realpresence Resource Manager API at timed intervals.
- **EMS.Polycom.dll** – Custom Polycom DLL that will display all EMS – Polycom Interface activity within the EMS application including errors and successfully scheduled videoconferences. The Polycom Activity DLL also contains an area that allows EMS Administrators to configure various EMS – Polycom Interface settings.

EMS – Polycom Interface Database Component Installation

New Installations

1. Obtain the **PolycomOverlay.sql** file.
2. Open *Microsoft SQL Server Management Studio*.
3. Within *Microsoft SQL Server Management Studio*, select **File > Open > File…** and locate **PolycomOverlay.sql**.
4. 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.

EMS – Polycom Service Installation

Pre-Installation Requirements

IMPORTANT: Existing versions of the EMS – Polycom Service must be manually uninstalled.

IMPORTANT: Install the EMS – Polycom Service on **one computer/server only**.

Installing or Upgrading the EMS – Polycom Service

1. Manually uninstall any existing versions of the EMS – Polycom Service.
2. Download the **PolycomServiceSetup.msi** file onto the server that will be running the service. This can be your existing EMS database server or Virtual EMS web server.
3. Run **PolycomServiceSetup.msi**.
4. The first screen welcomes you to the EMS Polycom Service Setup Wizard. Click **Next >** to begin the installation process. The *Select Installation Folder* screen will appear.
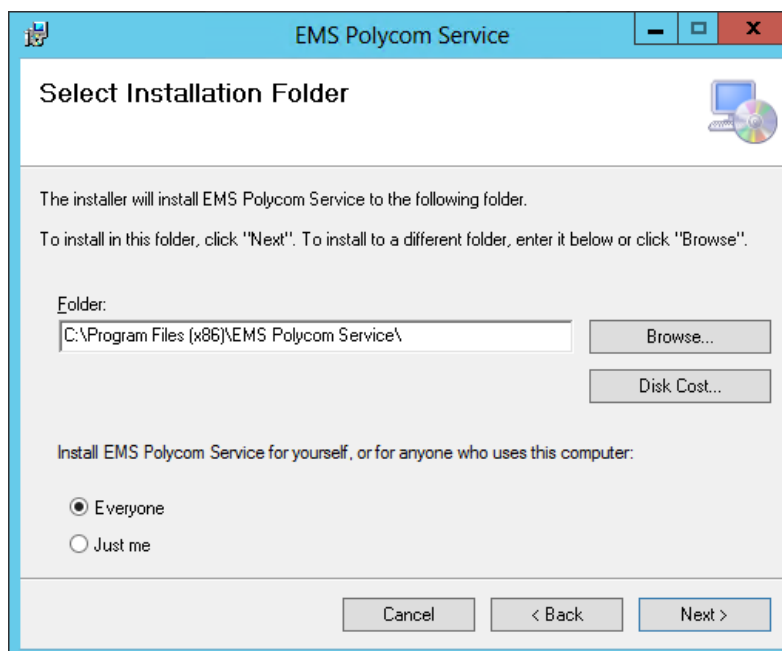
5. Select the installation Folder and context (Everyone or Just Me). It is recommended that you keep the default settings. Click **Next >.**
6. The *Confirm Installation* screen will appear. Click **Next >**.
7. The *Installation Complete* screen appears. Click **Close**.

Configuring the EMS – Polycom Service

1. Within the Windows **Start** menu, locate **EMS Polycom Settings**. The *EMS Polycom Settings* screen will appear.
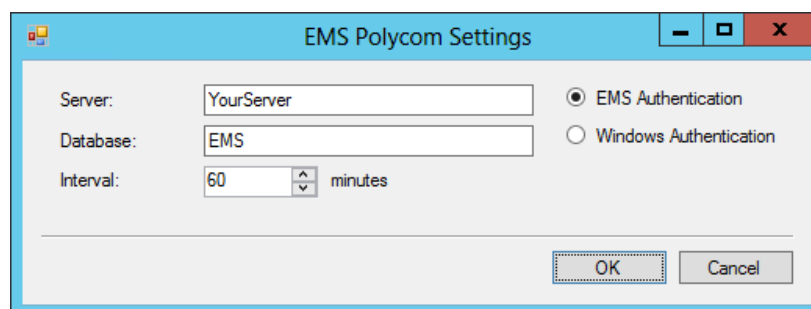

2. Enter your EMS MS SQL **Server** name.
3. Enter your EMS **Database** name.
4. Specify the service execution **Interval**.
5. Specify the **Authentication** mode (EMS or Windows).
6. Click **OK.**

Note: Additional EMS – Polycom Interface settings are configured in the Polycom Activity area within EMS. See the *EMS – Polycom Interface Configuration* section below.


Polycom Activity DLL Installation

Installing the EMS.PolycomActivity.dll

1. On **each client machine** that needs to access the Polycom Activity area, paste a copy of the **EMS.PolycomActivity.dll** file into the folder that contains your EMS application files (typically C:\Program Files\EMS).
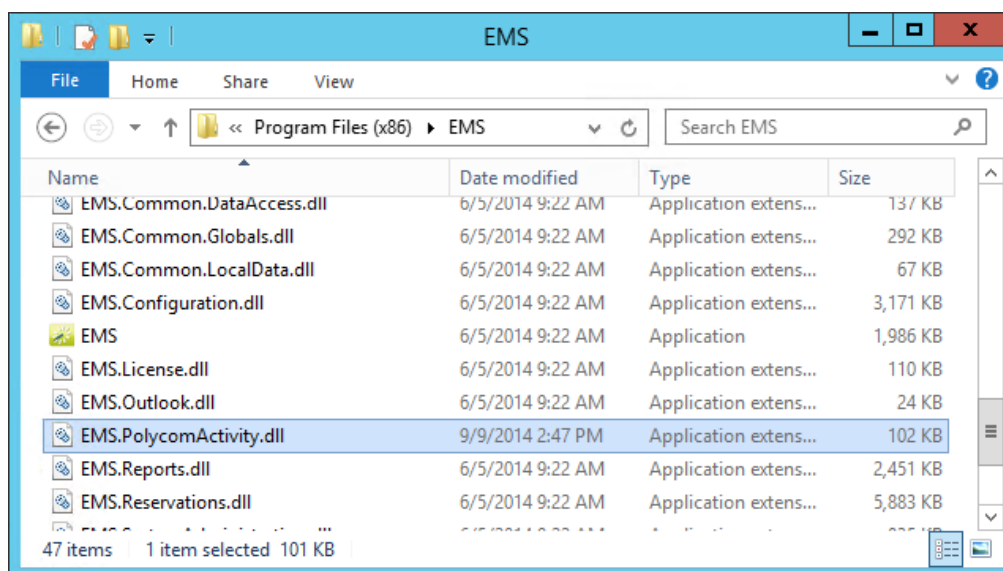
2. Once the **EMS.PolycomActivity.dll** is placed in the correct folder on the client machine, the EMS user will see the **Polycom Activity** button on the tool bar within the EMS application (assuming that you have updated your EMS Registration with the appropriate licensing information).
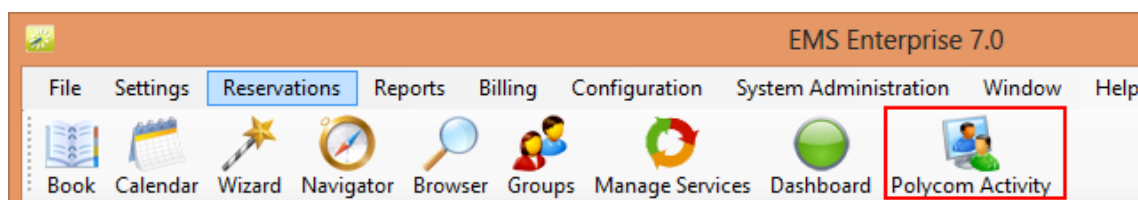
EMS – Polycom Interface Configuration

EMS – Polycom Room/Resource Configuration

Before activating the EMS – Polycom Interface, the EMS videoconference room and/or resource list must be synchronized with a Polycom RealPresence Resource Manager (e.g. room or resource). Systems are linked via the EMS Room/Resource **External Reference** field and the **UserID** in Polycom.

Rooms can be accessed in EMS within **Configuration > Facilities > Rooms**. Resources can be accessed in EMS within **Configuration > Resources.** For information on how to configure an EMS room and/or resource, please refer to the *EMS Setup Guide*.

EMS – Polycom Interface Configuration

Verify that the Polycom Realpresence Resource Manager API is running by opening a browser and entering the web service URL (typically https://<serverID>:<portNumberr>/api/rest).

The following screen should appear:

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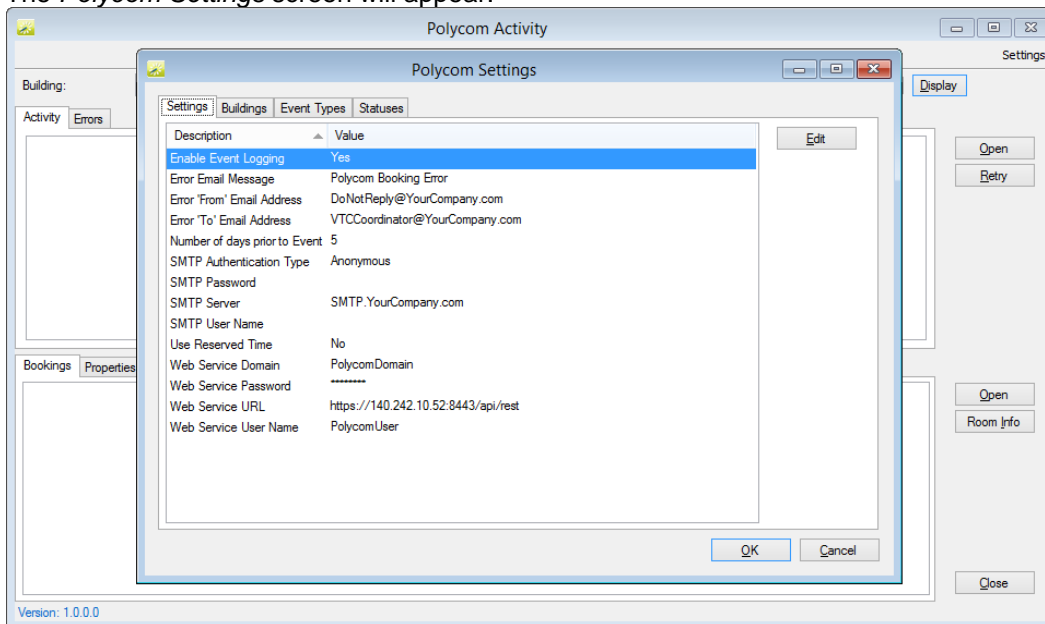
1. Log into the EMS desktop application using an EMS user account with Administrator-level access.
2. Click the **Polycom Activity** button on the tool bar. The *Polycom Activity* screen will appear.
3. Click the **Settings** menu option in the upper right-hand corner of the *Polycom Activity* screen. The *Polycom Settings* screen will appear.

4. On the **Settings** tab, specify values for the items listed by highlighting the record and clicking the **Edit** button. Once you configure a setting, click the **OK** button to save your value.
   - **Enable Event Logging** – Enables EMS – Polycom Windows Service event logging.
   - **Error Email Message** - Subject line of error email notifications.
   - **Error "From" Email Address** - Email address (individual or distribution group) that error email notifications will be sent from.
   - **Error "To" Email Address** - Email address (individual or distribution group) that error email notifications will be sent to.
   - **Number of days prior to Event** - Specifies how far in advance of a video-conference date the EMS – Polycom Interface should push the EMS booking(s) to Polycom.
   - **SMTP Authentication Type** – Anonymous or Authenticated.
   - **SMTP Password** - Specify if SMTP Authentication Type = Authenticated.
   - **SMTP Server** – Used to relay error notification emails.
   - **SMTP User Name** – Specify if SMTP Authentication Type = Authenticated.
   - **Use Reserved Time** – If set to Yes, the booking reserved time will be passed to the Polycom Realpresence Resource Manager API. Otherwise, the event time will be passed.
   - **Web Service Domain** – Polycom Realpresence Resource Manager API Web Service Domain.
   - **Web Service Password**
   - **Web Service URL** - URL to Polycom Realpresence Resource Manager API Web Service verified in Step 1.
   - **Web Service User Name**
5. Go to the **Buildings** tab. This tab is used to include/exclude EMS bookings scheduled in specific Buildings, Areas, or Views during processing. To select an item, highlight the record and click the **>** button.
6. Go to the **Event Types** tab. This tab is used to include/exclude EMS bookings scheduled in specific Event Types during processing.
7. Go to the **Status** tab. This tab is used to include/exclude EMS bookings scheduled in specific Statues during processing.
8. Click the **OK** button to save your settings.

Advanced EMS – Polycom Interface Configuration

By default, the following booking information is transferred from EMS to the Polycom Realpresence Resource Manager API:

Field Description	EMS Table.Column	Polcom Object Property	Direction
Reservation Event Name	tblReservation.EventName	reservation:name	EMS > Polycom
Booking Event Start Time	tblBooking.GMTTimeEventStart	reservation:start-time	EMS > Polycom
Booking Event End Time	tblBooking.GMTTimeEventEnd	reservation:end-time	EMS > Polycom
Room(s) and/or Resource(s)	tblRoom.ExternalReference and/or tblResource.ExternalReference	plcm-reserved-participant(s)	EMS > Polycom
Polycom Reference ID	tblPolycomActivity.PolycomReferenceID	Location|Etag	Polycom > EMS
Polycom Error Information	tblPolycomActivity.Activity	Web Service Exception	Polycom > EMS