
Plan-a-Meeting (PAM) Installation Instructions

For IBM Lotus Notes® Integration

EMS Workplace 7.0

EMS Campus 4.0

EMS Enterprise 7.0

EMS Legal 7.0

EMS District 7.0

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Introduction

Plan-a-Meeting (PAM) is a component for Virtual EMS that integrates with Microsoft Exchange or IBM Lotus Notes (EMS Workplace/Enterprise only). With this module, web users can view the availability of both meeting rooms *and* attendees, and send Microsoft Outlook or IBM Lotus Notes-compatible meeting invitations - all from within Virtual EMS.

This document lists the steps you must take to install the PAM component for Virtual EMS. You must be licensed for EMS, Virtual EMS, and PAM in order to configure and use this module. If you are unsure if your organization is licensed for PAM, or if you would like to learn more about it, please contact your Account Executive.

IMPORTANT: Plan-a-Meeting **does not** support mixed Lotus Notes/Domino Outlook/Exchange environments.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). Before you begin the installation/configuration process, we recommend that you contact Customer Support (or a member of the Professional Services group if you are working with one) to discuss the PAM setup process in your IIS and Microsoft Exchange or IBM Lotus Domino environment.

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

Plan-a-Meeting Requirements

- **EMS/Virtual EMS Installed**
EMS and Virtual EMS must be installed and operational.
- **Valid PAM License**
You must be licensed for EMS, Virtual EMS, and PAM in order to configure and use this module. If you are unsure if your organization is licensed for PAM, or if you would like to learn more about it, please contact your Account Executive.
- **Web Server Requirements**
 - The PAM Web Service manages all communication between EMS/Virtual EMS and your EMS.NSF file and is typically installed on the web server that hosts your Virtual EMS web site. The system requirements for the PAM Web Service are similar to the Virtual EMS requirements listed on www.dea.com.
 - **Microsoft .NET Framework 3.5**
 - The PAM Web Service must be reachable via http(s) by all EMS components (i.e. EMS desktop application, Virtual EMS, and the EMS Web Client). The PAM Web Service must also be able to reach your IBM Domino environment (i.e. EMS.NSF file).
- **IBM Lotus Notes / Domino**
Version 7.0 or later is required.
- **EMS.NSF File Installed**

The EMS.NSF file contains Java-based agents that are responsible for retrieving meeting attendee free/busy information from the Domino Busy Time database. The file also manages all appointment functionality, including creating meeting appointments in the organizer's calendar, sending invitations to attendees, and managing updates and cancellations. The EMS.NSF file can be deployed on one Domino gateway server or on all Domino mail servers in your enterprise. Performance and maintenance should be taken into consideration when making this decision.

- **Lotus Domino Mail Access Account**

An account (existing or new) with Editor and Delete privileges that exists in the ACL of all Domino mail databases is required. This account will be used to sign the EMS.NSF file. Any appointment functions executed by the EMS.NSF file are executed with the rights of this account. This account is not configured and/or stored in EMS.

- **HTTP Enabled on Lotus Domino Server**

The PAM Web Services communicates with the EMS.NSF file via HTTP requests. Therefore, HTTP must be enabled on your Lotus Domino server.

- **Lotus Domino PAM Web Service Account (PAM Account)**

An account is required for the PAM Web Service to authenticate to the EMS.NSF file. It is recommended that you create a new account to be specifically used by PAM instead of re-using an existing account. Once inputted, the PAM account's password is encrypted using 3DES technology and is not redisplayed to any user, including EMS administrators.

Obtaining the EMS.NSF File

Please contact Customer Support (or a member of the Professional Services group if you are working with one) to obtain the EMS.NSF file.

Obtaining the Latest Release of the PAM Web Service

The latest release of the PAM Web Service can be downloaded from the online Support Center.

1. Go to www.dea.com and enter your Email Address and Password in the Support Center area.
2. Click the [Software downloads](#) link.
3. Download **PAM Web Service (PAMWebService.msi)**. Required for both first time installations and upgrades.

Installing the EMS.NSF File

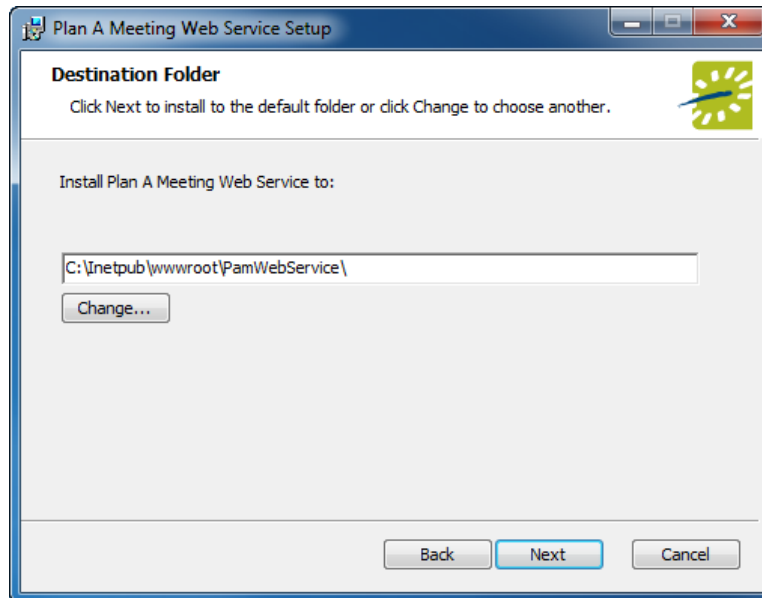
Install the EMS.NSF file in your Domino environment. The EMS.NSF file can be deployed on one Domino gateway server or on all Domino mail servers in your enterprise.

Installing/Upgrading the PAM Web Service

Important: Before beginning the installation process, please do the following:

- Install or upgrade your EMS databases as outlined in the *EMS Installation Instructions*.
- Manually **uninstall** any previous versions of the PAM Web Service on your web server.

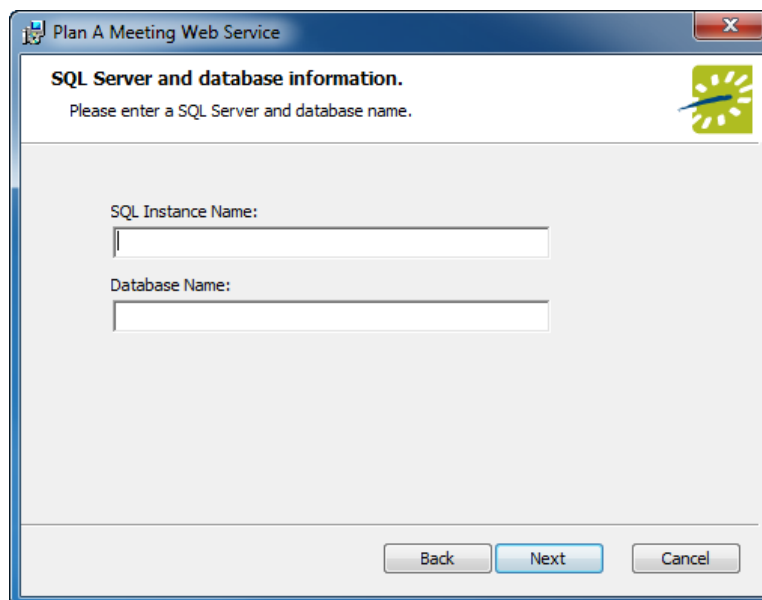
1. Verify that the requirements outlined in the [Plan-a-Meeting Requirements](#) section have been met.
2. Download **PAMWebService.msi** onto the web server that will be running the PAM Web Service.
3. Run **PAMWebService.msi**.
4. The first screen welcomes you to the Plan A Meeting Web Service Setup Wizard. Click **Next** to begin the installation process. The *Destination Folder* screen will appear.



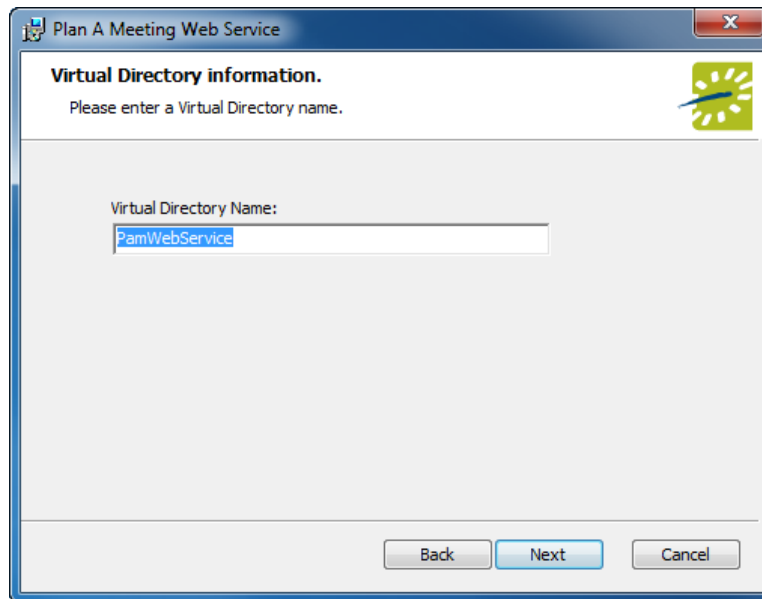
5. Select the destination folder. The installation process will create a new physical directory on your web server based on the destination folder path entered ("PamWebService" in the example above.) Click **Next**.

Note: The PAM Web Service should not be installed in the same physical directory as other EMS web-based products.

6. The *SQL Server and database information* screen will appear.




7. Enter your EMS SQL Instance Name.
8. Enter your EMS Database Name:
 - EMS Professional and EMS Lite customers – enter “EMSDData”
 - EMS Workplace, EMS Campus, EMS Legal and EMS Enterprise customers – typically named “EMS”
9. Click **Next**.
10. The *Virtual Directory information* screen will appear.



11. The Virtual Directory Name will default to the destination folder specified in Step 5. It is recommended that you keep the default setting. The installation process will create a virtual directory on your web server based on the virtual directory entered (“PamWebService” in the example above.) Click **Next**.

Note: The PAM Web Service should not be installed in the same virtual directory as other EMS web-based products.

12. The *Ready to install Plan A Meeting Web Service* screen will appear. Click  to install the PAM Web Service.
13. The *Completed the Plan A Meeting Web Service Setup Wizard* screen will appear. Click **Finish**.
14. After following the steps above, verify your installation by opening a browser and entering the following:

[http://\[ServerName\]/PAMWebService/PAMConfig.aspx](http://[ServerName]/PAMWebService/PAMConfig.aspx) (replace [ServerName] with the name of your web server)

Important: The Service.asmx page must be run under anonymous access **without** any authentication methods in place (e.g. Integrated Windows Authentication or Portal).

Configuring PAM

Required Settings

1. After following the steps above, access the PAM configuration area by opening a browser and entering the following:

[http://\[ServerName\]/PAMWebService/PAMConfig.aspx](http://[ServerName]/PAMWebService/PAMConfig.aspx) (replace [ServerName] with the name of your web server)
2. Go to the **Account Info** tab.

The screenshot shows the 'Account Info' tab of the PAM configuration interface. It contains several sections for configuring the PAM account:

- Provider:** A dropdown menu with 'Lotus' selected. Below it are checkboxes for 'Check this box if your Exchange environment has mailboxes on 2000/2003 servers...' and 'Check this box to utilize AutoDiscover to locate the best Client Access Server...'. A text field for 'Url to Exchange Web Services:' contains 'https://legacy.dea.com/EWS/Exchange.asmx'. A note states: 'Supply this value only if you cannot use AutoDiscover for some reason. NOTE: It is considered a best practice to use AutoDiscover when accessing the Exchange Web Services.' Below this is a text area for 'Follow Autodiscover redirects to the these Urls (pipe (|) delimited):'.
- Authentication Information:** Includes checkboxes for 'Use application pool identity...' and 'For Exchange Web Services, should impersonation be used...'. Text fields for 'Username:' (containing 'PamService') and 'Password:' are present. A note for the password field says 'Provide only if updating'.
- Pam Web Service Information:** Includes a 'PAM Web Service URL:' field with 'http://localhost/Pam43/Service.asmx' and a note 'Should be resolvable url of this Web Service ending in service.asmx (i.e. http://yourserver/PamWebService/service.asmx)'. An 'Authentication Type:' dropdown is set to 'Anonymous'. Text fields for 'Username:' and 'Password:' are also present, with a note for the password field saying 'Provide only if updating'.
- Attendee lookup Info:** Includes a section for 'Additional Columns To Display (DisplayName and Email always display):' with a 'JobTitle' field. Below this is a 'Directory Service Properties for data:' section with a text field containing 'cn|mail|department|title|location|companyname|manager|secretary' and a note 'DisplayName|Email|Department|JobTitle|OfficeLocation|CompanyName|Manager|AssistantName'.

A 'Save' button is located at the bottom left of the form.

3. Select Lotus in the **Provider** dropdown.
4. Within the *Authentication Information* section, enter your PAM Account **User Name** and **Password** (see the [Lotus Domino EMS PAM Web Service Account \(PAM Account\)](#) requirement above.) The User Name should be prefixed with your domain (example – YourDomain\PAM Account).
5. Ignore all other fields on the page. The PAM Web Service URL will be used in the [EMS Configuration](#) section later in this document.
6. Go to the **Lotus** tab.

Account Info | Message | Exchange 2007/2010 | Exchange 2000/2003 | **Lotus** | Test Settings

Required Information

HTTP path to the Notes Agent:
 Fully qualified http path to the agent i.e. http://YourDominoServer/EmsNDNR.nsf/

Attendee lookup Info

☐ Use LDAP to lookup attendees (otherwise we will search Domino Address Books)

LDAP authentication method:
 Anonymous

Path to LDAP:
 Path to LDAP

LDAP query to find attendees (including currently logged in user):

LDAP query to find attendees when there is a space in the search string:

Required only if your organization uses session authentication

☐ Use session authentication

Session authentication path format :
 The fully qualified http path to use for generating an authentication cookie

Debugging Info, Turn on ONLY when attempting to debug

☒ Generate debugging information ☒ Write debugging information to console

Save

7. Enter a valid URL to your EMS.NSF file in the **HTTP Path to the Notes Agent** field (example - <http://DominoServer/EMS.NSF/>)
8. Click **Save**.
9. Go to the **Test Settings** tab.
10. In the **Test Email** field, enter a fully qualified email address (example - John.Smith@YourCompany.com).

Note: When testing PAM, the email account that is being used (either on the Test Settings tab or in the [Testing PAM](#) section below) **MUST** exist in the Domino environment being tested. If you are testing PAM in a development environment please verify that a mailbox for the email being used exists in that domain/environment.

11. Click **Test Configuration**. If any errors are encountered, please verify your configuration. Otherwise, your PAM configuration is complete. Please go to the [EMS Configuration](#) section below.

Note: The steps outlined above satisfy the majority of PAM installations. Additional options are described in the [Optional Settings](#) section below.

Configuring EMS

1. Launch your EMS desktop client application. Log in as a user with System Administrator-level access.
2. Go to **System Administration > Settings > Parameters > EMS** and locate the parameter – “System – PAM Web Service URL”. Enter the URL of your PAM Web Service.

[http://\[ServerName\]/PAMWebService/Service.asmx](http://[ServerName]/PAMWebService/Service.asmx) (replace [ServerName] with the name of your web server)

Testing PAM

In order to test your PAM configuration, you will need to log into Virtual EMS with a web user account belonging to a Web Process Template (within the EMS client application) that has the **Allow Invitations** option checked.

1. Log into Virtual EMS. Go to **Reservations > Room Request**.

2. Enter 'When and Where' criteria and hit **Find Space**. Select a room.
3. Select the **Add to Calendar/Send Invitations** checkbox. If this option is not available, please verify (within the EMS client application) that your web user account belongs to a Web Process Template that has the **Allow Invitations** option checked.
4. Add an attendee by typing an attendee name in the **Find Attendee** textbox and hitting the magnifying glass icon.
5. Complete necessary information on the **Details** tab and click **Submit Reservation**.
6. Verify that an appointment was added to your Lotus Notes Calendar and that your attendee received an invitation.

Optional Settings

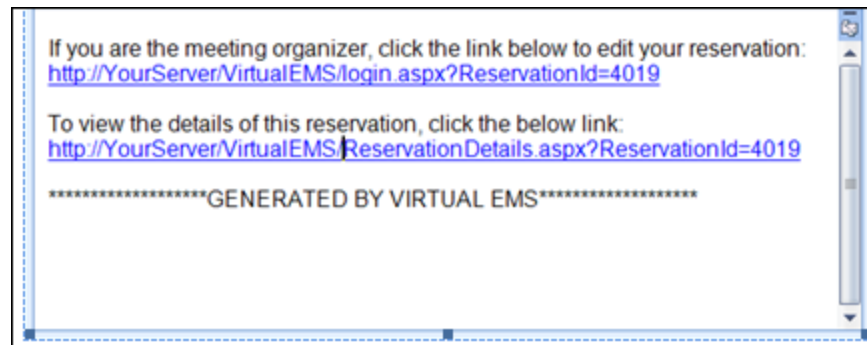
Account Info Tab

Note: See screenshot in [Required Settings](#) section.

- **Additional Columns to Display**
Pipe-delimited list of columns that are displayed when searching for an attendee. DisplayName (e.g. Mike Wimett) and Email are displayed by default.
- **Directory Service Properties for data**
Pipe-delimited list of LDAP properties that are returned when searching for an attendee.

Message Tab

- **Message To Append**
Message appended to the bottom of the appointment body. This message is seen by all users.
- **To view the details of this reservation click the below link**
Message added to the appointment body, above a link that takes a user to a view-only Virtual EMS page for the appointment. This message is seen by all users.
- **If you are the meeting organizer click the below link to edit the reservation**
Message added to the appointment body, above a link that takes the meeting organizer to the Virtual EMS Reservation Summary page for that reservation. This message is seen by all users, but only the meeting organizer can access the Reservation Summary page to make changes.
- **Allow Attachments**
Allows users to add attachments within Virtual EMS when making an appointment.
- **Maximum AttachmentSize**
If attachments are allowed, sets the maximum file size allowed for an attachment.



Lotus Tab

Note: See screenshot in [Required Settings](#) section.

- **Use LDAP to Lookup Attendees**
By default, the EMS.NSF file searches the Domino Address Book to look-up attendees. If the EMS.NSF file should use LDAP, check this option.
- **LDAP Authentication Method**
Determines the LDAP authentication method when looking-up an attendee.

- **Path to LDAP**
Example – LDAP://YourCompany.com:10010
- **LDAP query to find attendees + LDAP query to find attendees when there is a space in the search string**
These two LDAP queries are only to be edited when special circumstances arise with unique configurations of Lotus Notes and LDAP. If you choose to edit any of the queries, you should do so ***only if you are well-versed in developing and editing LDAP queries***. Before you begin editing a query, be sure to make a copy of the original query text.
- **Use Session Authentication**
Check this option if your environment uses session-based authentication for Lotus Notes.
- **Debugging Info, Turn on ONLY when attempting to debug**
Check this option to display debugging information.