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# EMS for Outlook Installation Instructions

EMS Workplace 7.0  
EMS Campus 4.0  
EMS Enterprise 7.0  
EMS Legal 7.0  
EMS District 7.0  
EMS Professional 13.0

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# EMS for Outlook Installation Instructions

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## Introduction

EMS for Outlook is an optional add-in that integrates EMS' room reservation process directly with Microsoft Outlook 2007/2010/2013. Users can view room availability in addition to attendee free/busy information simultaneously and book/manage their meetings directly within Outlook. This document lists the steps you must take to install and configure EMS for Outlook.

## 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.

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

## EMS for Outlook Requirements

- **User Desktop Requirements for Microsoft Outlook 2007 (Windows XP, Windows 7 and Windows 8/8.1)**
  - [.NET Framework 3.5](#) (Click the link to go to the Microsoft Download Center)
  - [2007 Microsoft Office System Primary Interop Assemblies \(PIA\)](#)
  - [Microsoft Visual Studio 2010 Tools for Office Runtime \(VSTOR 2010\)](#)
  - **\*\***[Microsoft Office 2007 Hotfix \(KB976477\)](#) or [MS10-036 security update for Office 2007 \(KB982312\)](#)

**Note:** These two Hotfixes have been rolled-up into [2007 Microsoft Office Suite Service Pack 3 \(SP3\)](#)

- **User Desktop Requirements for Microsoft Outlook 2010/2013 (Windows XP, Windows 7 and Windows 8/8.1)**
  - [.NET Framework 3.5](#) (Click the link to go to the Microsoft Download Center)
  - [Microsoft Visual Studio 2010 Tools for Office Runtime \(VSTOR 2010\)](#) (Windows XP Only)

**Note:** 64-bit editions of Microsoft Office 2010 and 2013 require additional installation steps not outlined in this document. Please contact Customer Support for more information.

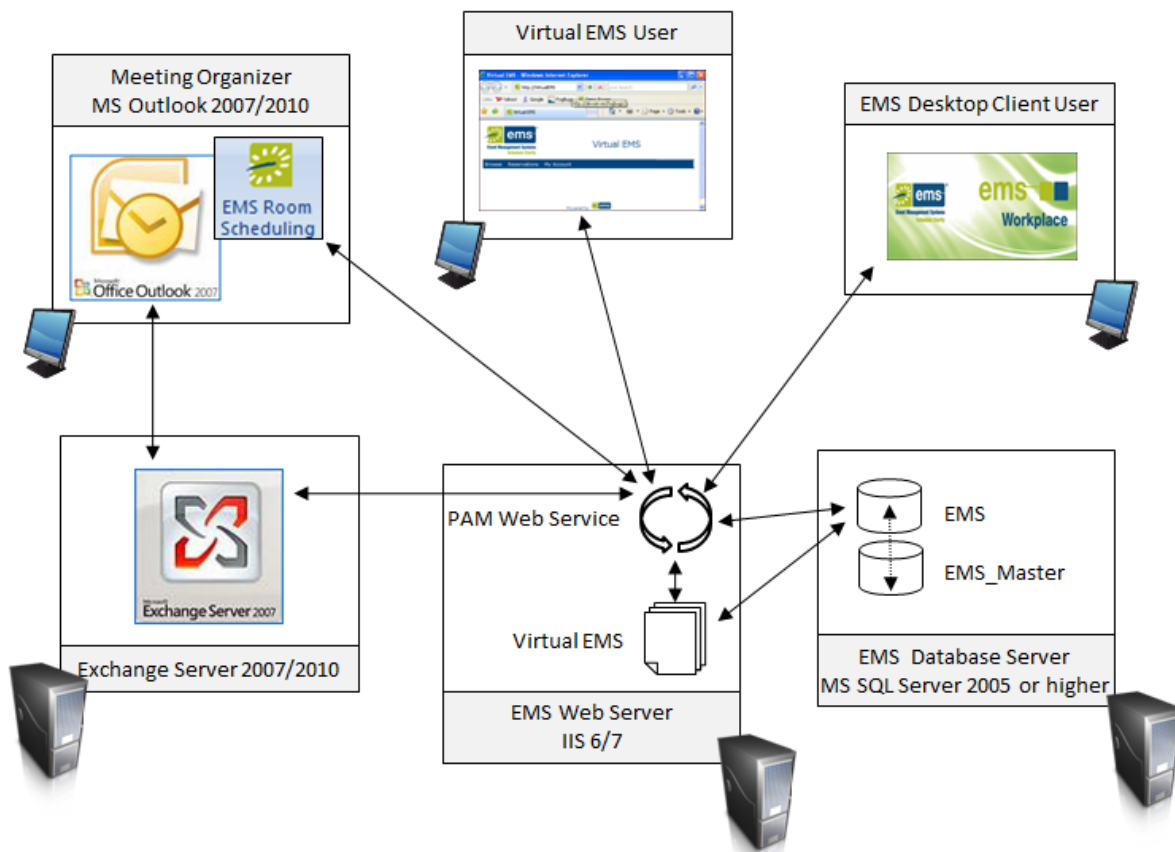
- **Microsoft Exchange 2007/2010/2013**  
Microsoft Exchange 2007 SP1, Microsoft Exchange 2010, or Microsoft Exchange 2013 is required.
- **Plan-a-Meeting (PAM) Module Installed**  
The PAM Web Service must be installed and operational. Please see the *Plan-a-Meeting (PAM) Installation Instructions for Microsoft Exchange Integration* for information on how to install and configure this component.
- **Valid EMS for Outlook Licensing**  
You must be licensed for EMS, Virtual EMS, EMS for Outlook, and Plan-a-Meeting in order to configure and use this module. If you are unsure whether or not your organization is appropriately licensed, please contact your Account Executive.

- **EMS/Virtual EMS Installed**  
EMS and Virtual EMS must be installed and operational.

## EMS for Outlook Technical Overview

EMS for Outlook is comprised of two main components – The PAM Web Service and the EMS for Outlook Add-in.

- **PAM Web Service** - This web service (typically installed where your Virtual EMS site resides) manages all communication/transactions between the EMS for Outlook Add-in (as well as the EMS client and Virtual EMS) and the EMS database including checking room availability, booking the meeting in EMS, and managing changes.

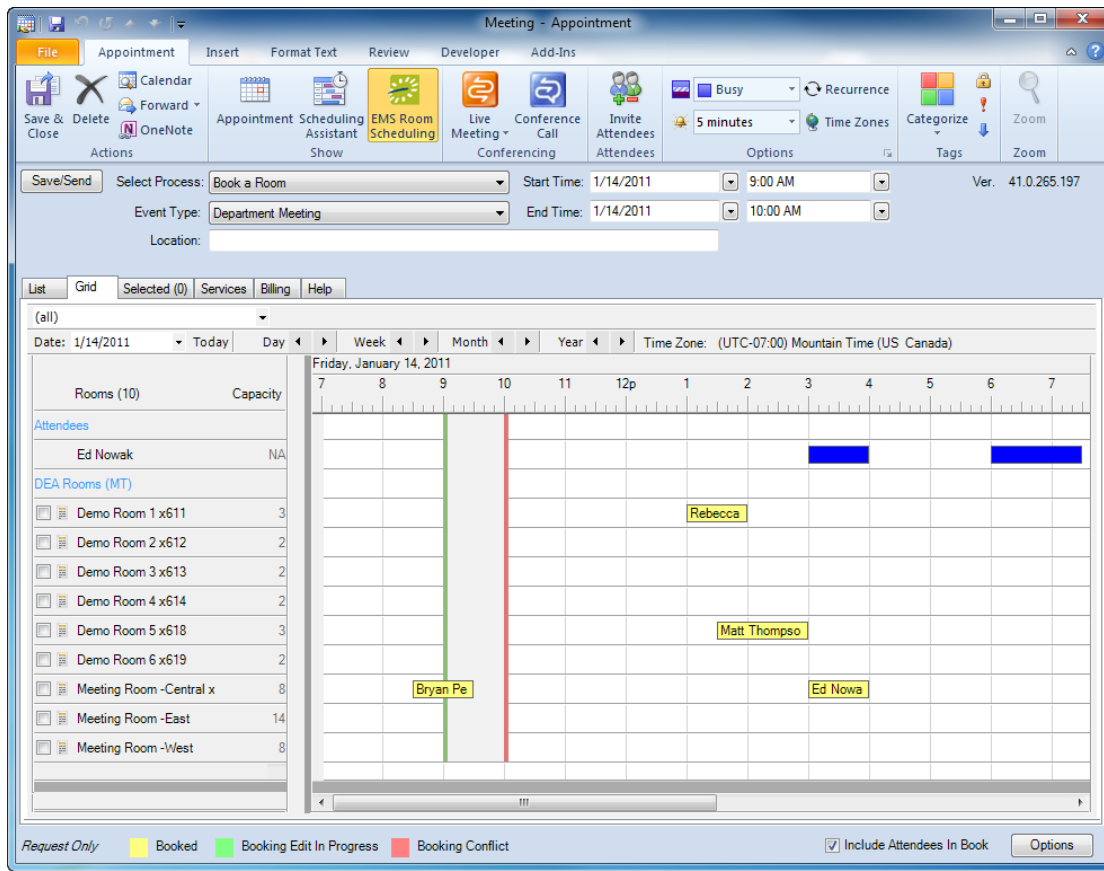


**EMSForOutlook.msi** will prompt the user for the PAM Web Service Address during the installation process. Once entered, a new key is created in the user's Windows Registry to store this URL:

**32-bit machines:** *HKEY\_LOCAL\_MACHINE\SOFTWARE\Dean Evans and Associates*

**64-bit machines:** *HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Dean Evans and Associates*

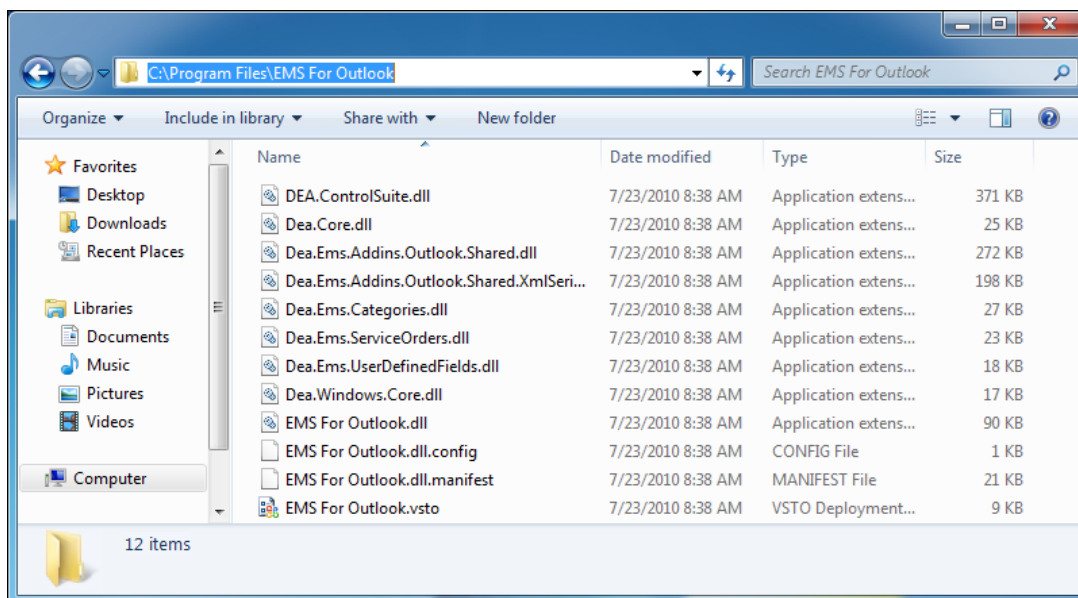
- **EMS for Outlook Add-in (EMSForOutlook.msi)** – COM Add-in installed on your users' desktops. This file exposes the EMS Room Scheduling option on the Outlook Calendar Appointment form.



By default, the **EMSForOutlook.msi** installs all of the files required by the EMS for Outlook Add-in within the following locations:

**32-bit machines** - *C:\Program Files\EMS for Outlook*

**64-bit machines** - *C:\Program Files (x86)\EMS for Outlook*



This location can be changed during the installation, but it is recommended that you keep the default.

EMS must also be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user.

- The Outlook user must have an active EMS Web User account.
- The EMS Web User account must be assigned to at least one Web Process Template with the **Outlook** option enabled.
- The EMS Web User account must be associated to an active EMS Group record.

**Note:** “Group” may have been relabeled to “Client” or “Employee” in your EMS system.

EMS configuration instructions can be found in the [Additional Information](#) section of this document.

## Obtaining the EMS for Outlook Installation File

The latest release of EMS for Outlook can be downloaded from the online Support Center.

1. Go to [www.dea.com](http://www.dea.com) and enter your Email Address and Password in the online Support Center area.
2. Click the [Software downloads](#) link.
3. Download **EMS for Outlook (EMSforOutlook.msi)**. Required for both first time installations and upgrades.

## Pre-Installation Requirements

1. The PAM Web Service must be installed and operational. Please see the *Plan-a-Meeting (PAM) Installation Instructions for Microsoft Exchange Integration* for information on how to install and configure this component. You can quickly verify if the PAM Web Service has been installed by opening a browser and entering the following:

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

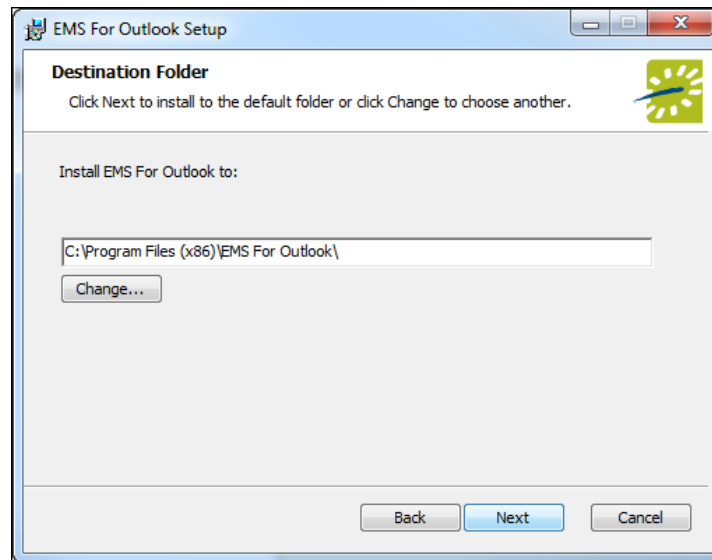
The PAM Web Service Address will be required when running the **EMSForOutlook.msi** (outlined in the next section.)

2. EMS must be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user. Please see the [Additional Information](#) section.
3. Verify that the necessary prerequisite software is installed on your users' workstations.

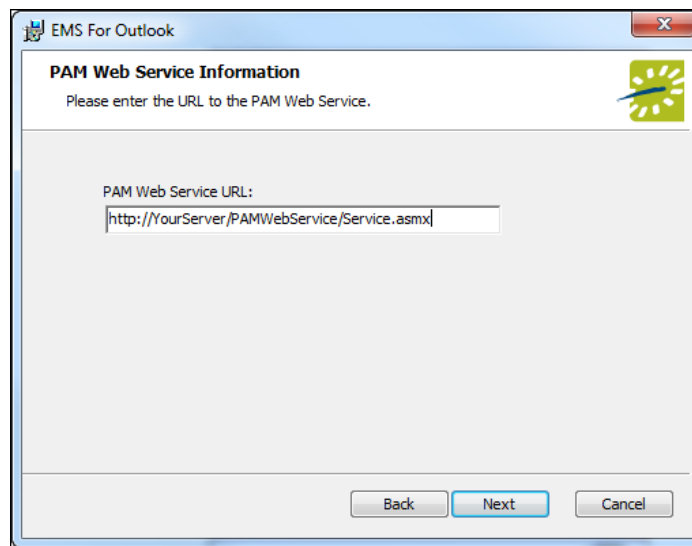
## Installing/Upgrading EMS for Outlook on a User's PC

**Note:** 64-bit editions of Microsoft Office 2010 and 2013 require additional installation steps not outlined in this document. Please contact Customer Support for more information.

1. Verify that the [pre-installation requirements](#) have been met.
2. Download the **EMSForOutlook.msi** file onto the user's desktop.
3. Close Outlook.
4. Run **EMSForOutlook.msi**.
5. The first screen welcomes you to the EMS Outlook Add-in Setup Wizard. Click the **Next** button to begin the installation process. The *Destination Folder* screen will appear.



6. Specify the installation Folder. **Note** - It is recommended that you keep the default setting.
7. Click the **Next** button. The *PAM Web Service Information* screen will appear.



8. Input the PAM Web Service Address. (Example - [http://\[ServerName\]/PAMWebService/Service.asmx](http://[ServerName]/PAMWebService/Service.asmx))
9. Click the **Next** button. The *Ready to install EMS for Outlook* screen will appear.
10. Click the **Install** button to complete the installation. Click the **Close** button to exit.
11. Launch Outlook. The **EMS Room Scheduling** button should display on the user's Calendar Appointment form.



## Additional Information

### EMS for Outlook Customization Options

#### To change the “EMS Room Scheduling” label:

1. Log into EMS.
2. Navigate to *System Administration > Settings > Parameters* and select the *Virtual* tab.
3. In the Area drop-down, select *EMS for Outlook*.
4. Select *Text to display under icon in EMS for Outlook* and click **Edit**.
5. Save your changes and click **OK**. Click **Close**.



Default icon and label

#### To change the EMS for Outlook icon:

- Secure your new icon file. The icon must be of file type BMP, GIF, JPG, or PNG. The new icon should have a resolution of 32 x 32 pixels.
- Ensure the new logo file is named CustomLogo.bmp (or other extension listed above).
- Drop the new custom icon into the EMS for Outlook installation directory (e.g. *C:\Program Files (x86)\EMS for Outlook*). This step must be performed *after* the EMS for Outlook plugin has been installed on the workstation.

**Note:** Microsoft Outlook needs to be restarted for either of these changes to take effect.

### EMS Configuration

EMS must be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user. An Outlook user's EMS Web User account is used by the EMS for Outlook Add-in to establish their room booking privileges (via which Web Process Template(s) they're assigned to) in addition to deriving which EMS Group(s) the appointment can be booked on behalf of.

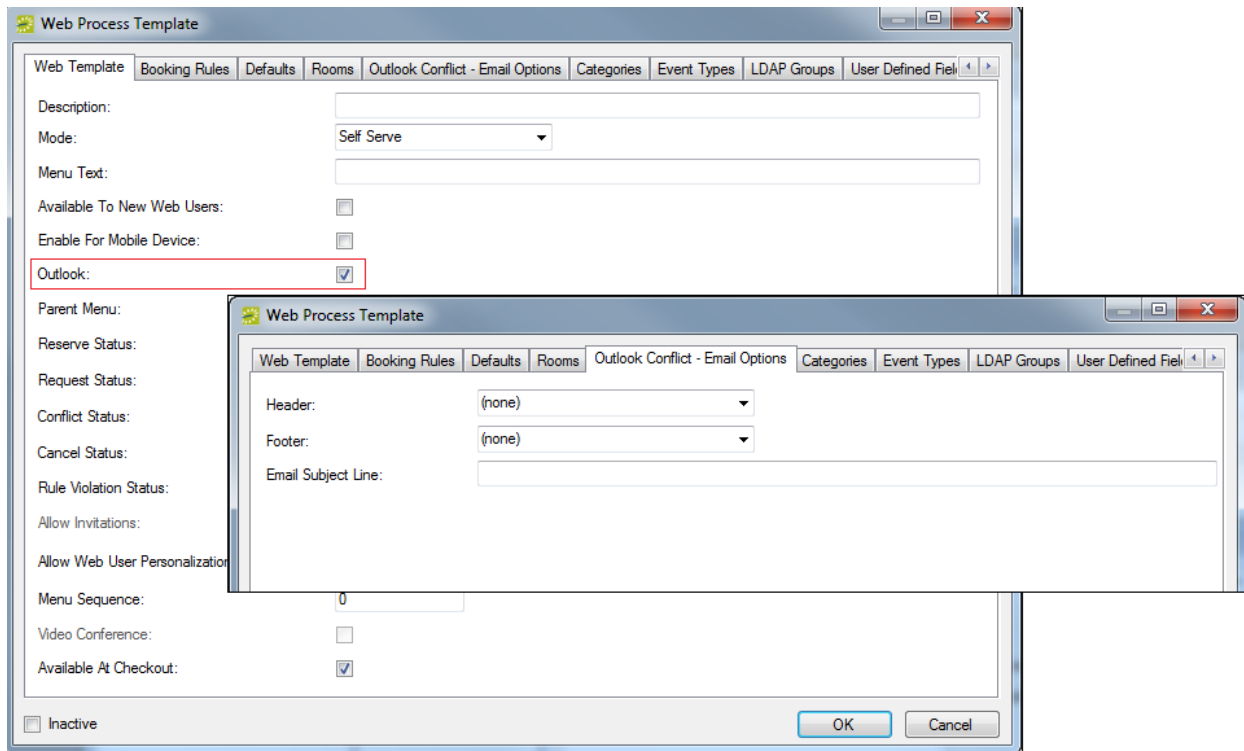
The following must exist in your EMS database in order to activate EMS for Outlook for a specific user:

- An active EMS Web User account must exist.
- The EMS Web User account must be assigned to at least one Web Process Template with the **Outlook** option enabled.
- The EMS Web User account must be linked to an active EMS Group record (via the **External Reference** field; see *Linking and EMS Web User Account to a Group Record* below) or, at a minimum, be able to book on behalf of at least one Group record (see *Assigning Group Record(s) to a Web User Account* below.)

### Defining an Outlook Web Process Template

Please see the *EMS Setup Guide* for instructions on how to create a Web Process Template.

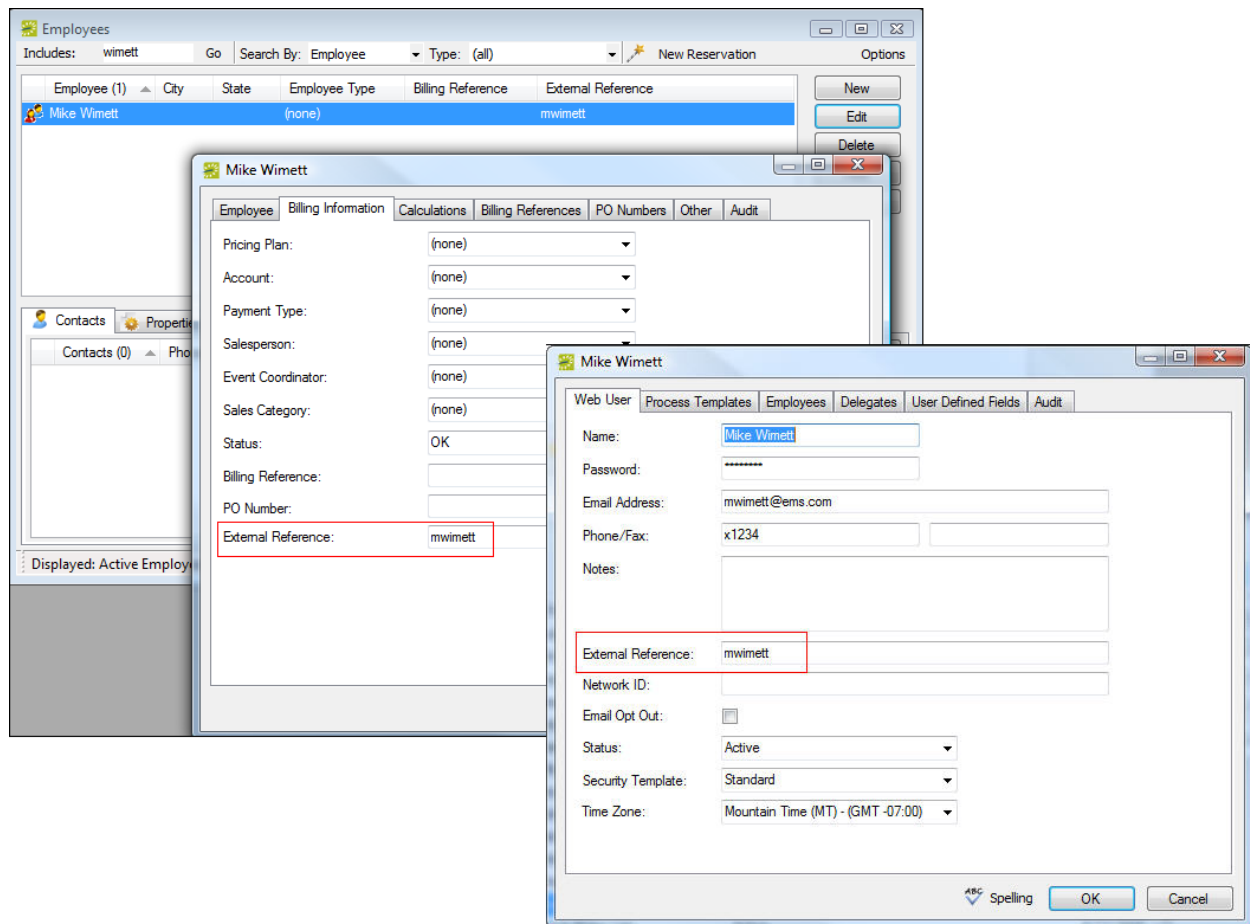
When defining a Web Process Template, simply select the **Outlook** option. The *Outlook Conflict – Email Options* tab allows you to specify your messaging for the email received by the Outlook user if a conflict is encountered during the booking process.



Complete the remaining tabs as documented in the *EMS Setup Guide*. Once you have defined your Outlook Web Process Template(s), assign it to your Web User(s).

### Linking an EMS Web User Account to a Group Record (Typical)

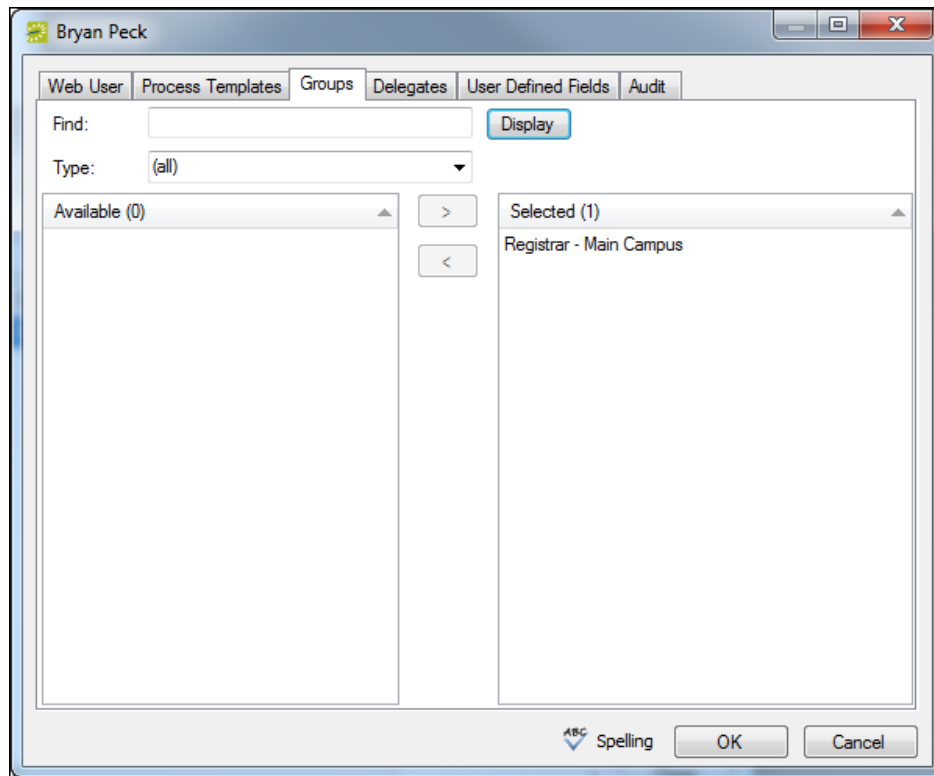
An EMS Web User account is matched to a Group record via the **External Reference** field. This can be verified for a specific user by comparing the **External Reference** field on their Group record (located on the *Billing Information* tab within *Reservations > Reservations > Groups*) and Web User account (located on the *Web User* tab within *Configuration > Web > Web Users*).



These values can be set automatically if your organization is using the HR Toolkit module. Please see the *HR Toolkit Installation Instructions* for more information.

### Assigning Group Record(s) to a Web User Account

A Group record is assigned to a Web User account within *Configuration > Web > Web Users*.



### ***Silent/Unattended Installation***

Command for unattended /silent installation of the **EMSForOutlook.msi** (replace [ServerName] with the name of your web server):

```
msiexec /I EMSForOutlook.msi /quiet WSURL="http://[ServerName]/PAMWebService/Service.asmx"
```