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# EMS

# Installation Instructions

EMS Workplace 7.0

EMS Campus 4.0

EMS Enterprise 7.0

EMS Legal 7.0

EMS District 7.0

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# EMS Installation Instructions

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## Introduction

This document lists the steps you must take to install EMS or upgrade to a more current version of the software. If you are upgrading to a newer version of EMS, please encourage users at your facility to read the separate *What's New* document before they begin working with the new version of the software. Doing so will minimize the amount of time it takes them to get "up-to-speed" with the new release and help them benefit from new features and functions that they might not otherwise discover.

**IMPORTANT:** All EMS related components (Virtual EMS, Web Client, EMS for Outlook, EMS Kiosk, etc.) must be upgraded with this release. Please review the [Important Considerations before Upgrading](#) section.

**IMPORTANT:** A new product registration process has been implemented for this release. Primary Contacts can obtain the license file from the Support Center area on [www.dea.com](http://www.dea.com). This license file is required to activate your EMS software and is required for new and existing customers.

**IMPORTANT:** Please see the *What's New* document for important information regarding the Web Client. Existing versions of the Web Client are **not** compatible with this release.

## Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

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

## Backing Up Your Data

Once you have installed EMS and begun defining your data, it is **extremely** important to back up your database every night. If your data is damaged and we determine the damage to be irreparable, your only alternative will be to restore from the most recent backup.

## Hardware and Software Requirements

The following components must be installed/enabled on your server in order to run the EMS installation files:

- [Windows Installer 4.5](#) must be installed.
- [.NET Framework 3.5](#) must be installed and enabled.

A list of general EMS system requirements is maintained on our [website](#).

## Obtaining the Latest Release of EMS

The latest release of EMS 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 Support Center area.

2. Click the [Software downloads](#) link.
3. Download the following files. (Required for both first time installations and upgrades.)
  - **EMS License (License.lic)** – License file required to activate your EMS software.
  - **EMS Server Install (EMS.ServerInstall.exe)** – File used to install or upgrade the EMS databases on your Microsoft SQL Server.
  - **EMS Client (EMSCClient.msi)** – File used to install or upgrade the EMS desktop application.
  - **EMS Email Notification (EMSEmailNotificationSetup.msi)** – File used to install the EMS Email Notification service (an optional system component.) See [Installing the EMS Email Notification Service](#).
  - **EMS Campus Auto Sync Service (EMSCampusAutoSyncSetup.msi)** – **EMS Campus only.** File used to install the optional EMS Campus Auto Sync Service (an optional system component.) See [Installing the EMS Campus Auto Sync Service](#).

## First Time Installation Instructions

The information in this section is for installing EMS for the first time at your facility. If you are already using an older version of EMS, please see the appropriate section later in this document.

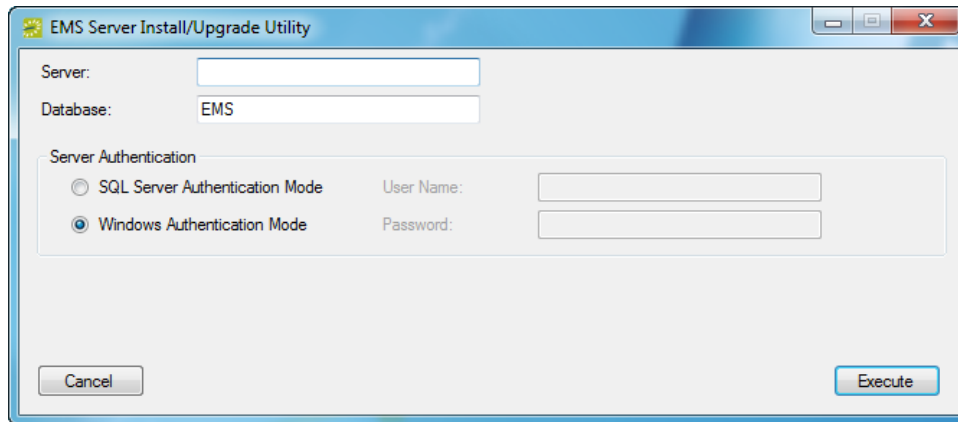
In order to install EMS, you must perform two operations. First, you must run **EMS.ServerInstall.exe** to create EMS databases on your database server. The second operation is to run the **EMSCClient.msi** program on each of the client computers to which you want to install the EMS desktop application.

### Installing the EMS Server Components

The server installation process will create two EMS databases on your MS SQL Server: An **EMS\_Master** database that contains licensing information and a separate **EMS** database that will ultimately contain your reservations data.

**Note:** A Microsoft SQL Server SA level account will be required to execute the database installation process.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMS.ServerInstall.exe** file.
3. Run **EMS.ServerInstall.exe** (This .exe can be run from any PC that has access to your database server.)



4. In the Server textbox, enter the name of the server running MS SQL Server.
5. In the Database textbox, enter the name for your EMS database. (It is recommended that you accept the default value of 'EMS'.)

6. In the Server Authentication area, specify your MS SQL Server authentication credentials. If SQL Server Authentication Mode is selected, you will be required to specify a User Name and Password.
7. Click the **Execute** button. A Create Database dialogue box will appear.
8. Click **Yes** to initiate the EMS database installation process.

**Note:** The time spent on the “Upgrading database...” phase in the installation process is highly dependent on the size of your database. Please be patient.

9. Click **OK** when you receive the “Database Installed Successfully!” message.

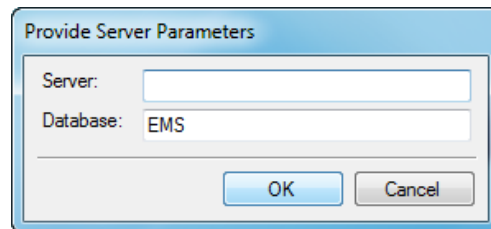
You have completed installing the server portion of EMS. Next you will install the software to client computers.

**Note:** For information on installing the optional Email Notification Service or the EMS Campus Auto Sync Service (EMS Campus only), please see [Installing or Upgrading the EMS Email Notification Service](#) and/or [Installing or Upgrading the EMS Campus Auto Sync Service](#).

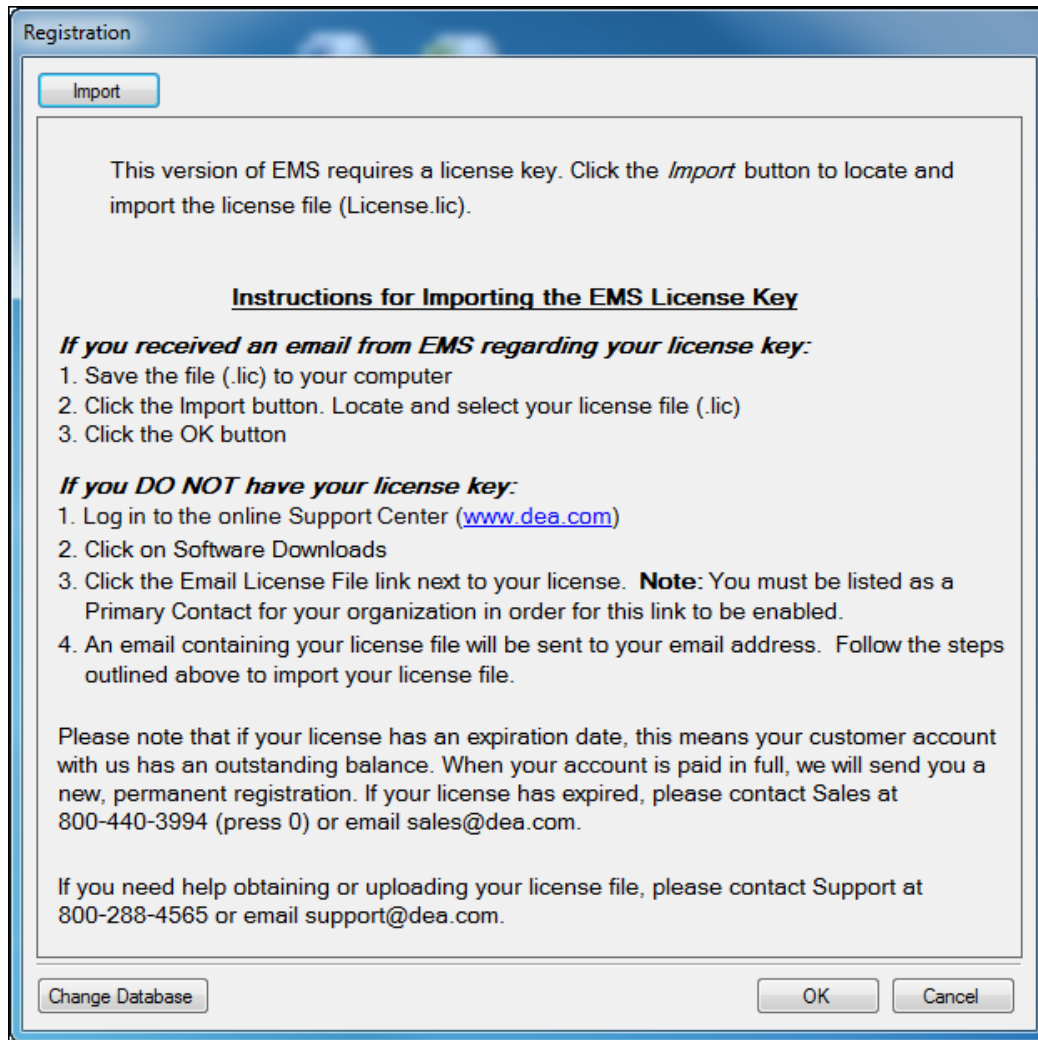
### ***Installing to Client Computers***

After your EMS databases have been created on your database server, you must install the client software on each computer that will access your EMS database.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMSClient.msi**.
3. Run **EMSClient.msi** on the client workstation. Follow the on-screen prompts. It is recommended that you accept the defaults.
4. Start **EMS** from the shortcut located on your desktop.
5. In the Provide Server Parameters dialog box, enter the name of your EMS Server and Database.



6. Click **OK**.
7. The system displays a message asking you to import your registration information. Click **OK**.
8. The Registration screen appears. Follow the instructions outlined on the screen to import your EMS license key.



9. At the EMS log-in screen, type **admin** as both the User ID and the Password.
10. Click **OK**.
11. You are now ready to begin using the system. You can begin defining your data following the instructions in the *EMS Setup Guide* or you can install to additional client computers by repeating **steps 1-6** above. (Note: Your license key only needs to be imported once.)

## Upgrade Instructions

In order to upgrade EMS, you must perform two operations. First, you must run **EMS.ServerInstall.exe** to upgrade the EMS databases on your database server. The second operation is to run the **EMSClient.msi** program on each of the client computers that currently are running the EMS desktop application.

**Note:** If you are upgrading from a version of EMS Enterprise that was released prior to version 3.0, please contact our Customer Support department for information on upgrading to the latest release.

**Note:** If you are upgrading from EMS Lite or EMS Professional, please contact our Customer Support department for information on upgrading to the latest release.

## Important Considerations before Upgrading

**IMPORTANT:** The following EMS components must be upgraded to the new platform.

- ✓ **Product Registration** - A new product registration process has been implemented for this release. Primary Contacts can obtain the license file from the Support Center area on [www.dea.com](http://www.dea.com). This license file is required to activate your EMS software.
- ✓ **Virtual EMS** – Please see the *Virtual EMS Installation Instructions*.
- ✓ **EMS Web Client** – Please see the *What's New* document for important information regarding the Web Client. Existing versions of the Web Client are **not** compatible with this release.
- ✓ **EMS Campus Planning Interface (EMS Campus only)** – Formerly known as the EMS Campus Web Client. Please see the *EMS Campus Planning Interface Installation Instructions*.
- ✓ **EMS Campus Web Service (EMS Campus only)** – If you are upgrading from EMS Campus 2.0, a new version of the EMS Campus Web Service (including the queries.xml and views.sql files) may be required. Please contact your Client Services Consultant to evaluate and discuss any potential impacts to your installation. Please see the *EMS Campus Web Service Installation Instructions and White Paper* for installation instructions.
- ✓ **EMS Email Notification Service** – Please see [Installing or Upgrading the EMS Email Notification Service](#).
- ✓ **EMS Campus Auto Sync Service (EMS Campus only)** – Please see [Installing or Upgrading the EMS Campus Auto Sync Service](#).
- ✓ **PAM Web Service** – Web service used by the optional Plan-a-Meeting and EMS for Outlook modules. Please see the *Plan-a-Meeting Installation Instructions*.
- ✓ **EMS for Outlook** –Optional module. Please see the *EMS for Outlook Installation Instructions*.
- ✓ **Custom Report(s)** – If a custom report was developed for you by DEA, please contact Customer Support to request a new Custom Report DLL that is compatible with this version. Five business days may be required to compile a new DLL, so please plan accordingly.
- ✓ **EMS Kiosk** – Optional module. Please see the *EMS Kiosk Installation Instructions*.
- ✓ **Floor Plan Configuration Utility** – Web application used with the optional Floor Plan module. Please see the *Floor Plan Module Installation Instructions*.
- ✓ **EMS Room Diagramming Service** – Web service used by the optional Floor Plan module. Please see the *Floor Plan Module Installation Instructions*.
- ✓ **HR Toolkit** – Customers using the optional HR Toolkit to feed employee and web user data to EMS should contact their Client Services Consultant to evaluate and discuss any potential impacts to the interface.
- ✓ **FM Toolkit** – Customers using the optional FM Toolkit to feed facility data to EMS should contact their Client Services Consultant to evaluate and discuss any potential impacts to the interface.
- ✓ **EMS – Cisco TMS Interface** – Optional interface that feeds videoconferences booked in EMS to Cisco TMS. Please see the *EMS – Cisco TMS Interface Installation Instructions*.
- ✓ **EMS API** – Version 1.1.12 or newer required. Please see the *EMS API Reference Guide*.



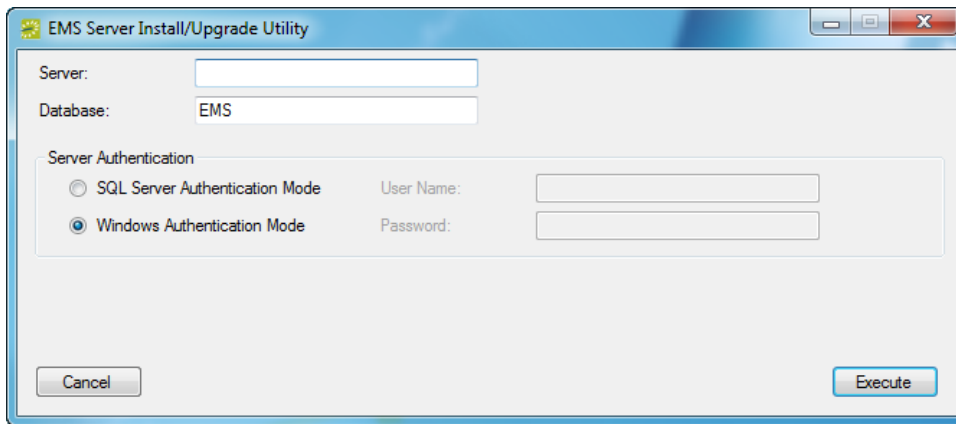
- ✓ **Video Display Interface** – Customers upgrading from EMS Enterprise 4.0 or below will be required to re-configure the Scheduled Task to automatically execute the export process. Please see the *EMS User Manual* for instructions.

### Upgrading the EMS Server Components

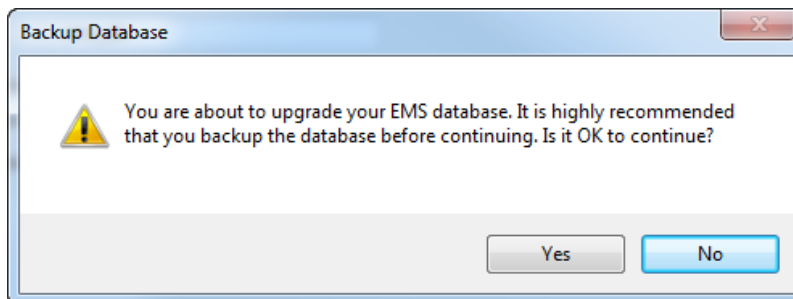
The server upgrade process will upgrade the EMS databases on your MS SQL Server. For customers upgrading from EMS Enterprise 4.x or below, your existing **EMSEnterprise\_Master** database that contains licensing information will be replaced by a new **EMS\_Master** database, and your existing **EMS** database will be upgraded to the current version.

**Note:** A Microsoft SQL Server SA level account will be required to execute the database upgrade process.

1. Review the [Important Considerations before Upgrading](#) section.
2. Verify that the prerequisite software is installed.
3. Secure the **EMS.ServerInstall.exe** file.
4. **IMPORTANT:** Using **SQL Server Management Studio**, back-up your existing EMS databases.
5. Run **EMS.ServerInstall.exe**. (This .exe can be run from any PC that has access to your database server.)



6. In the Server textbox, enter the name of the MS SQL Server.
7. In the Database textbox, enter the name for your EMS database that is to be upgraded.
8. In the Server Authentication area, specify your MS SQL Server authentication credentials. If SQL Server Authentication Mode is selected, you will be required to specify a User Name and Password.
9. Click the **Execute** button. A Backup Database dialogue box will appear.



10. Click **Yes** to acknowledge that you have backed-up your EMS databases and it is OK to continue.

You have completed the upgrade process for the server portion of EMS. Next you will upgrade client computers.

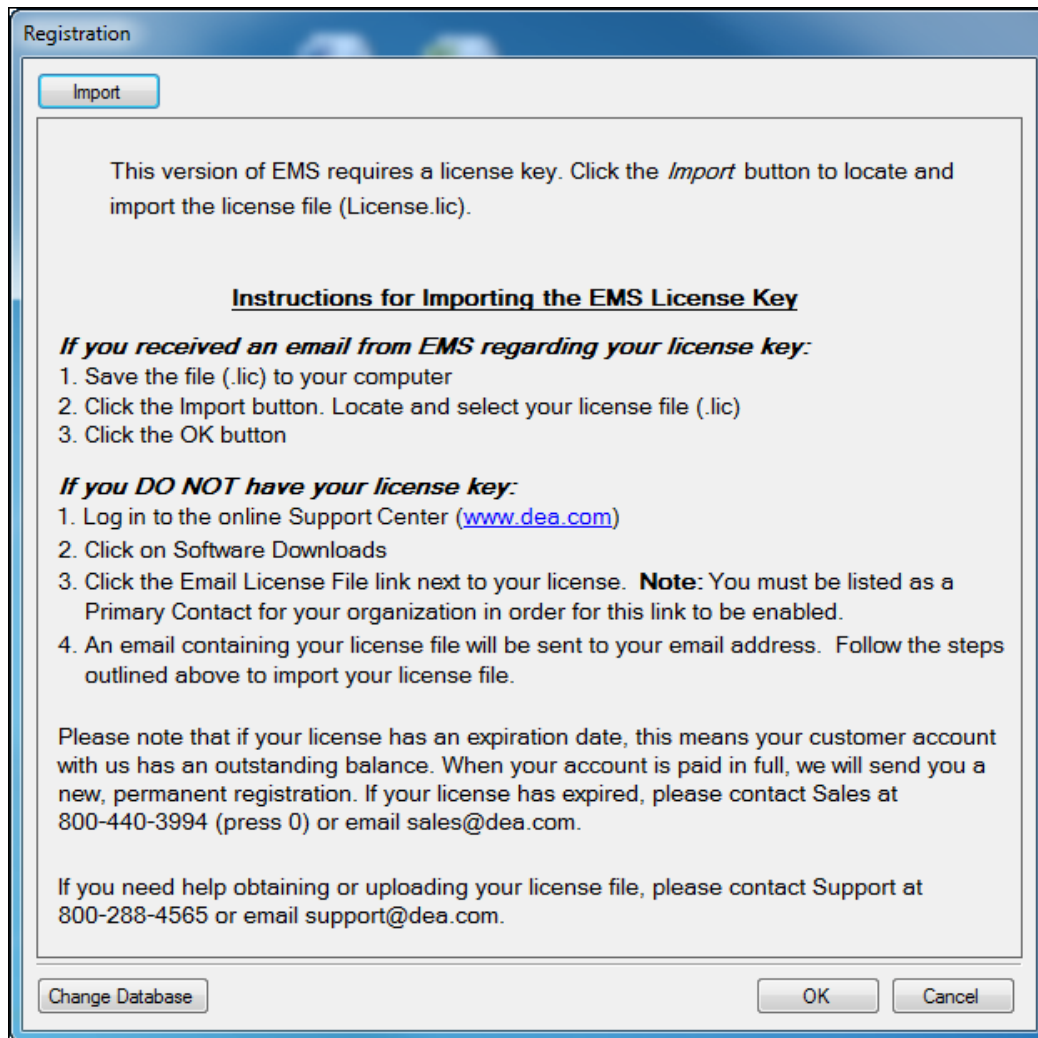
**Note:** For information on installing the optional Email Notification Service or the EMS Campus Auto Sync Service (EMS Campus only), please see [Installing or Upgrading the EMS Email Notification Service](#) and/or [Installing or Upgrading the EMS Campus Auto Sync Service](#).

### Upgrading EMS Client Computers

To upgrade an EMS client computer, take the following steps:

**Note:** Existing versions of EMS must be manually uninstalled.

1. Verify that the prerequisite software has been installed.
2. Secure the **EMSCClient.msi**.
3. Run **EMSCClient.msi** on the client workstation. Follow the on-screen prompts. It is recommended that you accept the defaults.
4. Start **EMS** from the shortcut located on your desktop.
5. The system displays a message asking you to import your registration information. Click **OK**.
6. The Registration screen appears. Follow the instructions outlined on the screen to import your EMS license key.



7. At the EMS log-in screen, enter your User ID and Password.
8. Click **OK**.
9. Install to additional client computers by repeating **steps 1-4** above. (Note: Your license key only needs to be imported once.)

## Installing or Upgrading 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.

**IMPORTANT:** Install the EMS Email Notification Service on one computer/server only.

To install the EMS Email Notification Service:

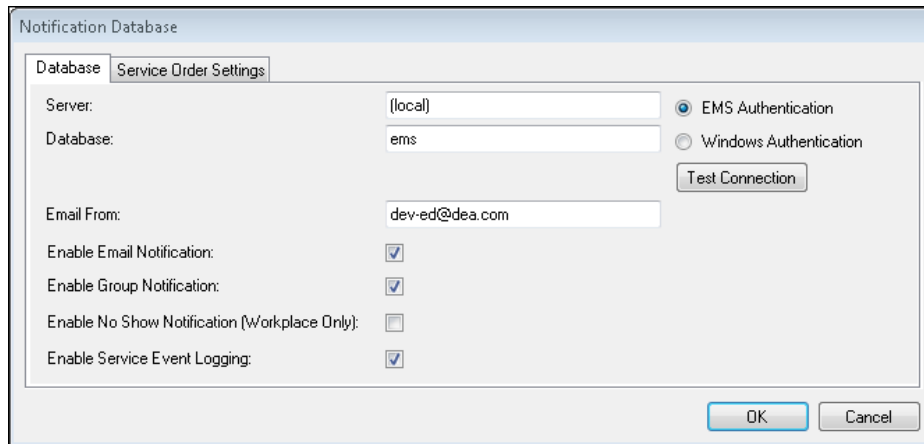
1. Verify that the prerequisite software is installed.
2. Manually uninstall any existing versions of the EMS Email Notification Service.
3. Download the **EMSEmailNotificationSetup.msi** onto the server that will be running the service.
4. Double-click **EMSEmailNotificationSetup.msi**. Follow the on-screen 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 screen will appear.

The screenshot shows the 'EMS Email Notification Configuration' dialog box. It has a blue title bar and a light gray background. The 'SMTP Settings' section includes a 'Mode' dropdown menu set to 'Unauthenticated', an 'SMTP Server' text box containing 'mail.company.com', a 'Port Number' spinner box set to '25', a 'Use SSL' checkbox which is unchecked, 'User Name' and 'Password' text boxes, and an 'Email Interval' spinner box set to '30' minutes. The 'Databases' section features a table with two columns: 'Server (1)' and 'Database'. The table contains one row with 'server' in the first column and 'database' in the second. To the right of the table are three buttons: 'New', 'Edit', and 'Delete'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Server (1)	Database
server	database

6. Review and complete/change the following settings:

- **Mode** – Type of authentication to the SMTP server.
  - **SMTP Server** – SMTP server name or IP address.
  - **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.



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 No Show Notification (Workplace Only)** – Activates 'no show' 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.

**Note:** If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.

The Email Notification Service is now enabled. See the *EMS Setup Guide* for information on defining Notification Rules.

## Installing or Upgrading 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.

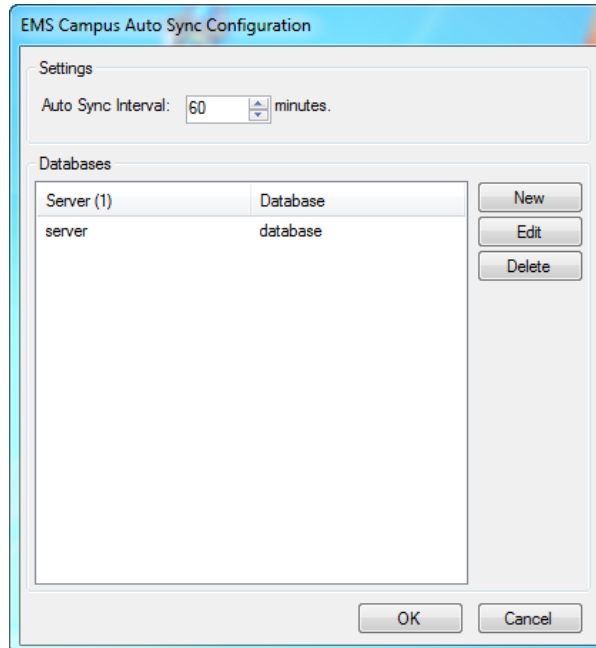
The EMS Campus Auto Sync Service must be installed on a computer/server that is connected to the network and is running 24 hours a day.

**IMPORTANT:** Existing versions of the EMS Campus Auto Sync Service must be manually uninstalled.

**IMPORTANT:** Install the EMS Campus Auto Sync Service on **one computer/server only**.

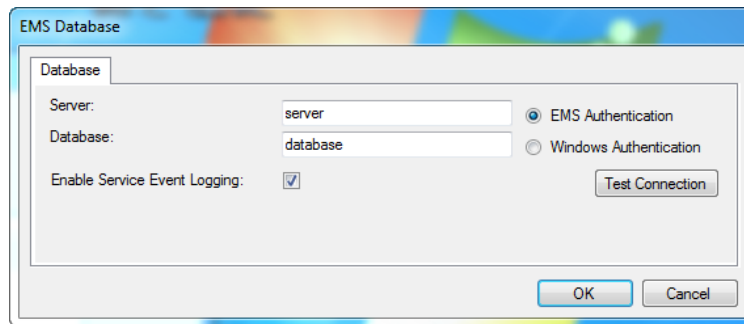
To install the EMS Campus Auto Sync Service:

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.



6. Set the **Auto Sync Interval**. DEA recommends setting this value to 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.

- 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.



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

**Note:** If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.

The EMS Campus Auto Sync Service is now enabled. See the **To automatically process courses post-publish section** in the *EMS User's Manual* and the **EMS System Parameters** section within the *EMS Setup Guide* for information on how to configure the auto sync feature.