



USER'S GUIDE

RMS ENTERPRISE TOUCH PANEL USER INTERFACE


G5 TOUCH PANELS

July 31, 2014 3:29 PM

Room 102 In Use

1 PM	00 30	
2 PM	00 30	
3 PM	00 30	Status Meeting
4 PM	00 30	
5 PM	00 30	

Status Meeting



3:00 PM - 4:00 PM

Room CalendarExtend MeetingEnd MeetingMeeting Info

AMXHelpHotlistDo Not DisturbExit

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RMS Enterprise User Guide - G5 Panels

Overview

This document describes using the RMS Enterprise X Series G5 touch panel pages for help and service requests, and provides instructions on using the Scheduling features of RMS.

For details on RMS Enterprise G4 touch panel pages, refer to the *RMS Enterprise G4 Panels User Guide*.

RMS Enterprise Home Page

The RMS Enterprise Home Page is the initial view for all RMS G5 touch panels (FIG. 1):

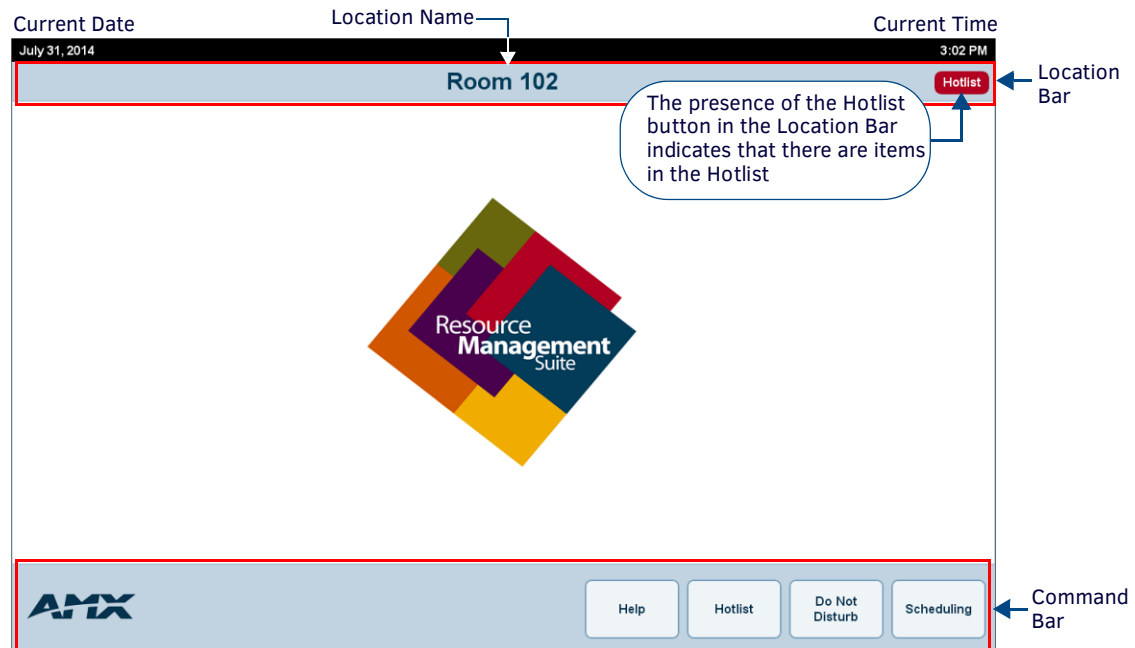


FIG. 1 RMS Enterprise Home Page ("internal" panel shown)

The Home page includes a Command Bar with four buttons:

- **Help** - Press to submit a *Help Request*. Generally, Help Requests entail a request for User help. See *Sending a Help Request* on page 5 for details.
- **Hotlist** - Press to open the *Hotlist*. The Hotlist is the main view of the exception-based reporting system. See *Viewing the Hotlist* on page 6 for details.
- **Ring Doorbell / Do Not Disturb** - This button varies depending on whether the panel has been designated as an "external" or an "internal" panel (see page 4 for more information on external vs internal panels):
 - On *external* panels (touch panels installed outside the meeting room), the Home page provides a **Ring Doorbell** button. Press this button to ring a doorbell sound and display a popup message on the internal panel(s). See *Ringing the Doorbell (External Panels Only)* on page 7 for details.
 - On *internal* panels (touch panels installed inside the meeting room), the Home page provides a **Do Not Disturb** button (as shown in FIG. 1). Press this button to display a *Please Do Not Disturb* message and disable the *Ring Doorbell* button on the external panel(s). See *Do Not Disturb (Internal Panels Only)* on page 7 for details.
- **Scheduling** - Press to open the *Scheduling* page for this location. The options in this page allow you to view and schedule meetings in this location. The layout of the *Scheduling* page indicates the current state of the location associated with the panel.

Internal Panels vs External Panels

Based on system configuration, each touch panel boots up as either an *external* or an *internal* panel. The term "external panel" refers to a touch panel that is physically located on the outside of it's associated room. Likewise, the term "internal panel" refers to a touch panel that is located inside the room.

There are several differences in the panel pages shown on an Interior panel as compared to an external panel for the same location. One difference is in the buttons presented in the Command Bar (FIG. 2):



FIG. 2 Home page - Command Bar

- Only external panels present the *Ring Doorbell* option.
- Only internal panels present the *Do Not Disturb* option.

Using the Home Page Command Buttons

Sending a Help Request

The *Help* button is displayed in the Command Bar (FIG. 3):

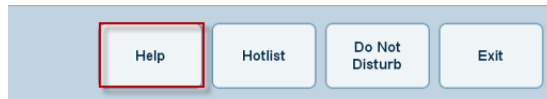


FIG. 3 Command Bar - Help button

1. Press **Help** to open the *Help Request* page (FIG. 4). Use this page to send a help request:

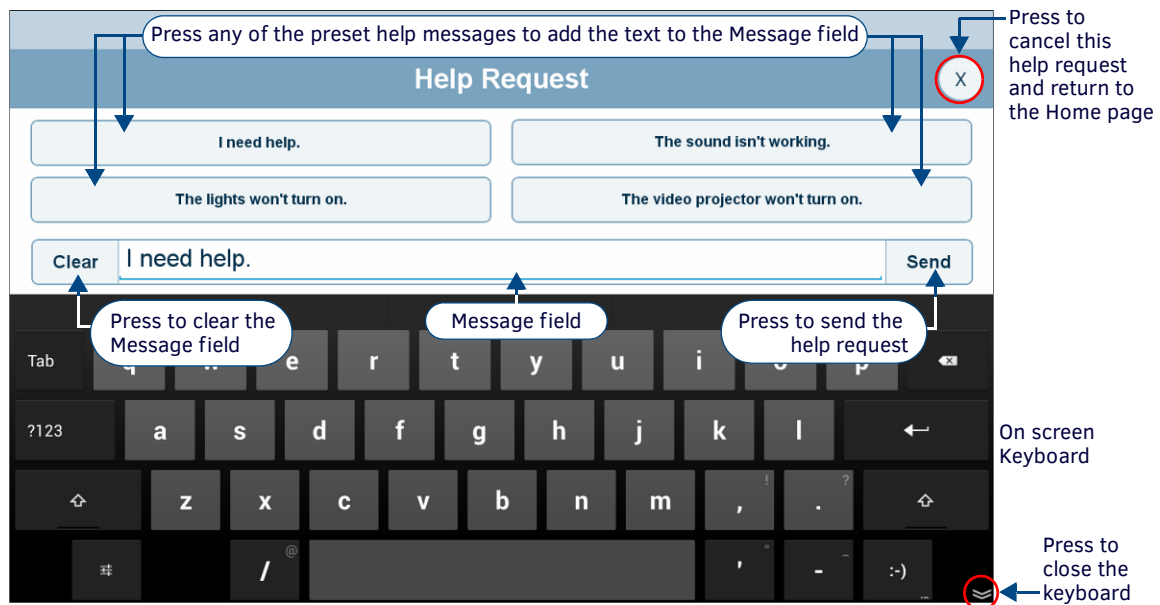


FIG. 4 Help Request page

By default, when this page is invoked, the on-screen keyboard is automatically opened, to provide the User with a means of typing a request into the *Message* field.

This keyboard features spell-checking and auto-complete.

This page also provides four preset messages that can be simply be pressed to automatically enter the text into the *Message* field. In this case, the keyboard is not needed.

Note that the keyboard can be closed via the "Close" icon in the lower-right corner. It can be re-opened at any time by pressing inside the *Message* field.

- Press the "X" icon in the upper-right corner to cancel the current help request close the Help Request page.
 - Press **Clear** to clear all text from the *Message* field.
2. Type the help request message or select one of the preset help request messages..
 3. Press **Send**.
 4. RMS indicates that the help request has been submitted (FIG. 5):

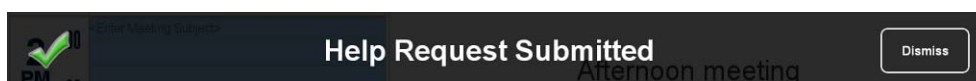


FIG. 5 Help Request Submitted

NOTE: Press *Dismiss* to close this message. This does not cancel the help request, it only dismisses the message. Note that the message will be dismissed automatically after 30 seconds.

There are several types of responses you can expect from the Help Desk (*Information, Warning, Security, Critical* or *Question*). An example is shown in FIG. 6:

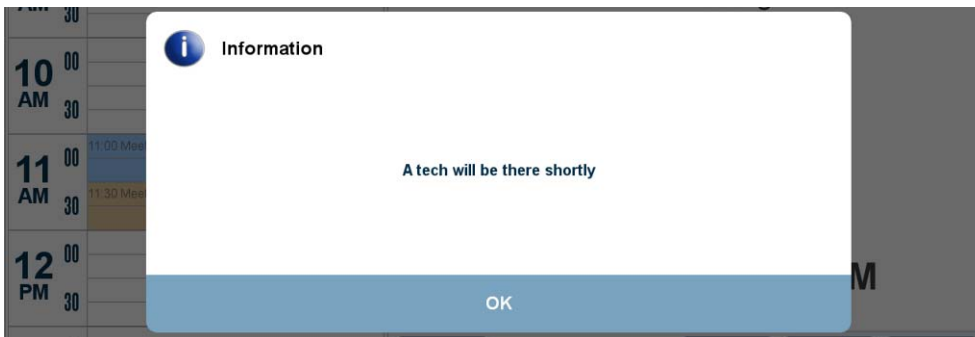


FIG. 6 Example (Information) response to a Help request

1. Press **OK** to confirm and close the message window.

Viewing the Hotlist

The Hotlist is the main view of the exception-based reporting system. The *Hotlist* button is displayed in the Command Bar for internal and external panels, regardless of the state of the room (FIG. 7):

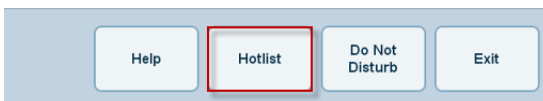


FIG. 7 Command Bar - Hotlist button

NOTE: The presence of the red Hotlist button on the location Bar (see FIG. 1 on page 4) indicates that there are items in the Hotlist.

1. Press **Hotlist** to open the *Hotlist* for this location (FIG. 8):

Status	Occurrence	Asset	Parameter	Value
Location Communication Error	Aug 1, 2014	MXD-1000i	Online Status	Offline
System Maintenance Mode	Aug 1, 2014	System		
Equipment Usage	Aug 1, 2014	MXT-1001i	Volume Mute	true

FIG. 8 Example Hotlist Page

- Use the **Previous** and **Next** buttons to view all pages of the Hotlist if necessary
 - Press **Refresh** to refresh the Hotlist records listing.
2. Press on an item in the Hotlist to view a detailed summary of the item in the *Hotlist Item Details* window (FIG. 9):

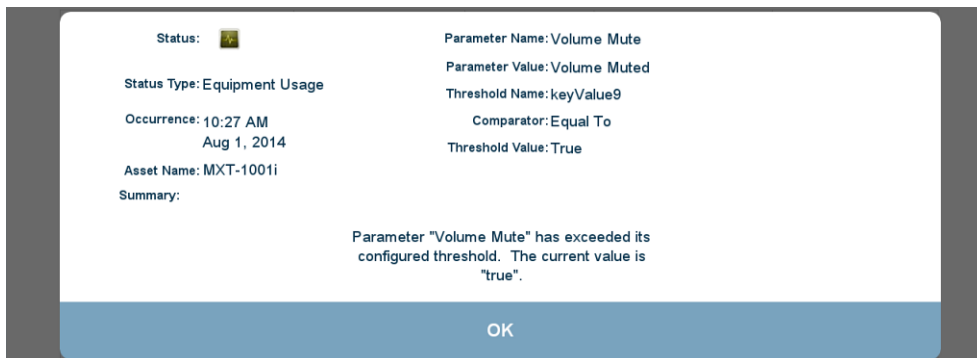


FIG. 9 Example Hotlist Item Details window

3. Press **OK** to close the *Hotlist Item Details* window.
4. Press **Back** in the Hotlist page to return to the Home page.

Ringing the Doorbell (External Panels Only)

The *Ring Doorbell* button is displayed in the Command Bar for external panels, regardless of the state of the room (FIG. 10):

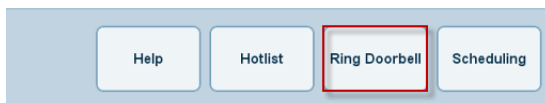


FIG. 10 Scheduling page Command Bar - Ring Doorbell button

Press **Ring Doorbell** on an external panel to play the doorbell sound and/or display a message on the internal panel(s).

Do Not Disturb (Internal Panels Only)

The *Do Not Disturb* button is displayed in the Command Bar for internal panels, regardless of the state of the room (FIG. 11):



FIG. 11 Scheduling page Command Bar - Do Not Disturb button

Press **Do Not Disturb** on an internal panel to display the *Please Do Not Disturb* message (FIG. 12) and disable the *Ring Doorbell* button on the external panel(s).



FIG. 12 Do Not Disturb) Internal and External Panel views

The "Please Do Not Disturb" message will remain displayed until the user de-selects the *Do Not Disturb* button on the internal panel.

Exit

The *Exit* button is displayed in the Scheduling page Command Bar, on both internal and external panels (FIG. 13).

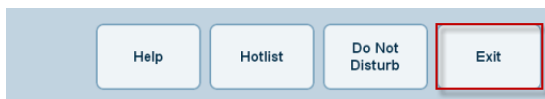


FIG. 13 Scheduling page Command Bar - Exit button

Press **Exit** to close the Scheduling page and return to the Home page.

RMS Scheduling Page

Press the **Scheduling** button on the Home page (see FIG. 1 on page 4) to open the *Scheduling* page for this location. There are three basic variations on the Scheduling page layout:

- No active meeting, and no meeting(s) scheduled for the day (see below).
- A meeting is currently in progress (see page 10).
- No active meeting, but at least one meeting is scheduled for later in the day (see page 9).

Scheduling Page - No Active Meeting, No Meetings Scheduled for Today

FIG. 14 shows an example of the most basic layout of the Home page. This view indicates that there is no meeting currently underway, and there are also no meetings scheduled for the day:

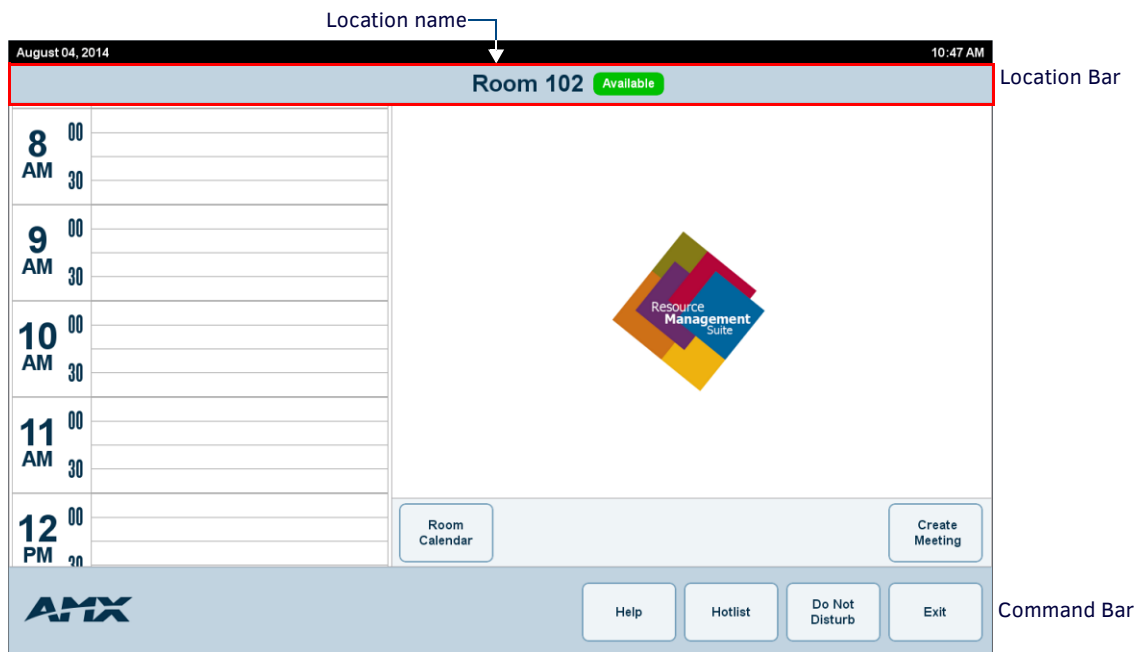


FIG. 14 Scheduling Page - No Meeting Currently in Progress (External Panel shown)

When there is not a meeting currently in progress, the following elements are displayed (refer to FIG. 17):

NOTE: This basic Scheduling page layout is also shown if there is a meeting in progress and a user has pressed the Exit Command Bar button (see page 7). In this case, since there is a meeting in progress, the Location Bar indicates In Use (rather than Available).

Note that the Command Bar and Location Bar are displayed at all times (regardless of the state of the location).

- The **Location Bar** indicates that this location is **Available**
- The **Room Schedule** is displayed on the left side of the page (in this case, empty)
- The **Meeting Window** provides the subject of the next scheduled meeting and its duration.
- The buttons in the **Meeting Command Bar** provide the following options:
 - Press **Room Calendar** to view a monthly calendar for this location. See *Viewing the Room Calendar* on page 11 for details.
 - Press **Create Meeting** to schedule a meeting to begin immediately. See the *Scheduling a Meeting for Now* section on page 14 for details.
- Press **Exit** to return to the Home page.

Scheduling Page - No Active Meeting, Meeting(s) Scheduled for Later

FIG. 15 shows an example of the Scheduling page, in a case where there is no meeting currently in progress, but there is at least one meeting scheduled for later this day.

Note that this layout is similar to the Meeting in Progress layout (see FIG. 17 on page 10), but in this case the Meeting Window shows information for the *next scheduled* meeting:

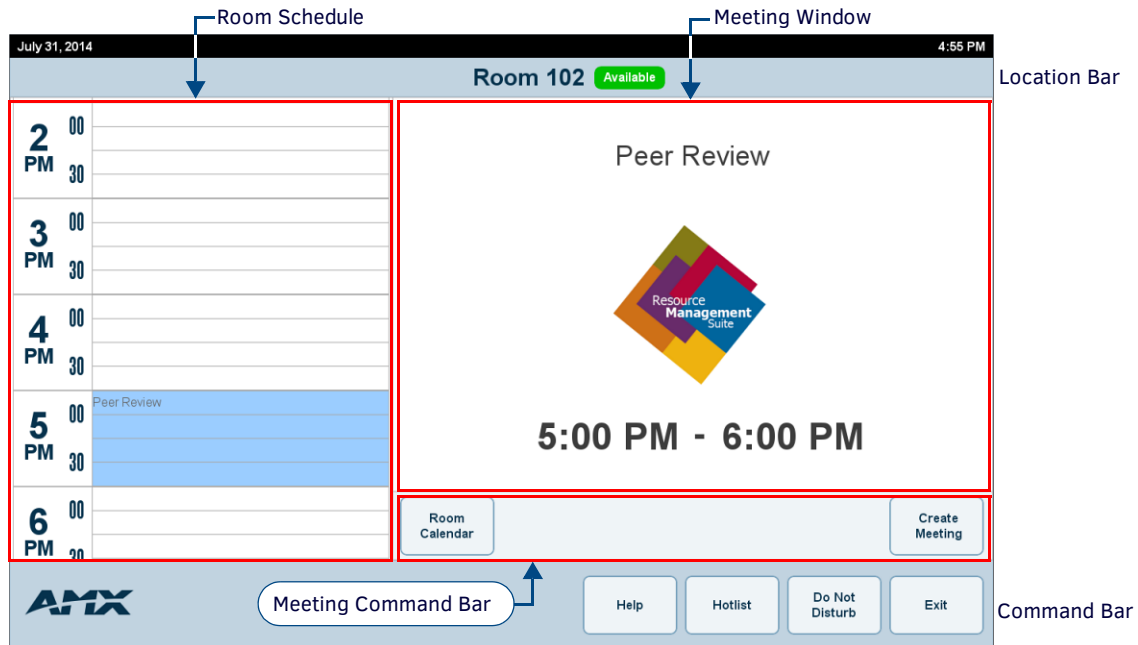


FIG. 15 Scheduling Page, with no active meeting and a meeting scheduled for later

Note that the Command Bar and Location Bar are displayed at all times (regardless of the state of the location).

- The **Location Bar** indicates that this location is **Available**
- The **Room Schedule** is displayed on the left side of the page. Any meetings scheduled for today are indicated in the Room Schedule.
 - Swipe up and down in the Room Schedule to scroll.
 - Press on a meeting in the Room Schedule to view a detailed summary for that meeting. See *Viewing Meeting Information* on page 12 for details.
- The **Meeting Window** provides the subject of the next scheduled meeting and its duration.
- The buttons in the **Meeting Command Bar** provide the following options:
 - Press **Room Calendar** to view a monthly calendar for this location. See *Viewing the Room Calendar* on page 11 for details.
 - Press **Create Meeting** to schedule a meeting to begin immediately - see the *Scheduling a Meeting for Now* section on page 14
- Press **Exit** to return to the Home page (FIG. 16):



FIG. 16 Command Bar - with a Meeting in Progress

Scheduling Page - Meeting in Progress

When a meeting is in progress, the Scheduling page displays a meeting-specific layout, which includes the *Room Schedule*, the *Meeting Window* and the *Meeting Command Bar* (FIG. 17):

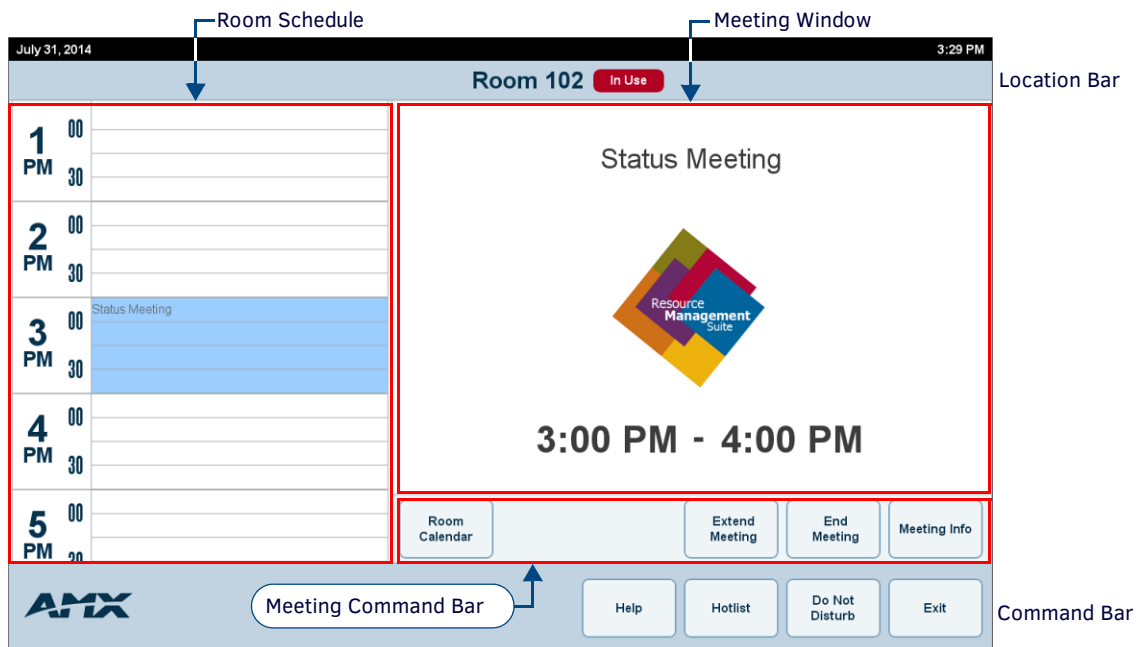


FIG. 17 Scheduling Page, with a meeting in progress

Note that the Command Bar and Location Bar are displayed at all times (regardless of the state of the location).

- The **Location Bar** indicates that this location is **In Use**.
- The **Room Schedule** is displayed on the left side of the page. Any meetings scheduled for today are indicated in the Room Schedule.
 - Swipe up and down in the Room Schedule to scroll.
 - Press on a meeting in the Room Schedule to view a detailed summary for this meeting. See *Viewing Meeting Information* on page 12 for details.
- The **Meeting Window** displays the subject of the current meeting and its duration.
- The buttons in the **Meeting Command Bar** provide the following meeting-specific options:
 - Press **Room Calendar** to view a monthly calendar for this location. See *Viewing the Room Calendar* on page 11 for details.
 - Press **Extend Meeting** to extend this meeting beyond its original end time. See *Extending a Meeting (Internal Panels only)* on page 12 for details.
 - Press **End Meeting** to end this meeting immediately. See *Ending a Meeting (Internal Panels only)* on page 13 for details.
 - Press **Meeting Info** to view a detailed summary of this meeting. See *Viewing Meeting Information* on page 12 for details.

NOTE: The *Extend Meeting* and *End Meeting* buttons are only available on internal panels. See *Internal Panels vs External Panels* on page 4 for details.

- Press **Exit** to return to the Home page.

Using the Meeting Command Bar Buttons

The *Meeting Command Bar* is displayed in the Scheduling page. The buttons displayed in the Meeting Command bar depend on the location of the panel (internal or external) as well as the current state of the location (FIG. 18).



FIG. 18 Meeting Command Bar (Internal and External panel views)

Viewing the Room Calendar

The *Room Calendar* button is displayed in the Meeting Command Bar on both internal and external panels, regardless of the room's state (FIG. 19):



FIG. 19 Meeting Command Bar - Room Calendar button

To view the event schedule for a different day, press the **Room Calendar** button to open the Calendar page, and select a date to view in the Room Schedule (FIG. 20).

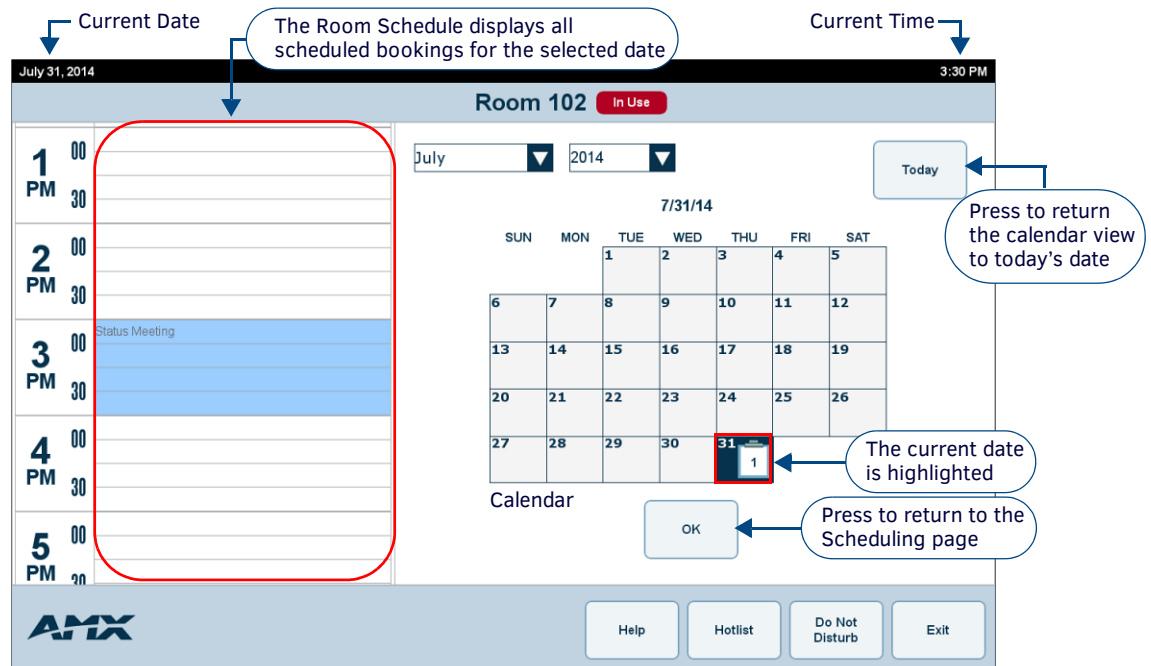


FIG. 20 Room Calendar page

- In the Calendar, each day that has at least one booking reserved is represented with a numbered icon. The number indicates the number of bookings reserved on that date.
- When a date is selected in the calendar, the Room Schedule indicates the events scheduled for the selected date. Swipe up and down in the Room Schedule to scroll.
- Press on a meeting in the Room Schedule to view that meeting's details, in the *Meeting Information* window (see FIG. 23).

Creating a Meeting

The *Create Meeting* button is displayed on both internal and external panels, if the room is currently available (FIG. 21):



FIG. 21 Meeting Command Bar - Create Meeting button

Press **Create Meeting** to schedule a meeting to start immediately - see *Scheduling a Meeting for Now* on page 14 for details.

Viewing Meeting Information

The *Meeting Info* button is displayed on both internal and external panels, if a meeting is currently in progress (FIG. 22):

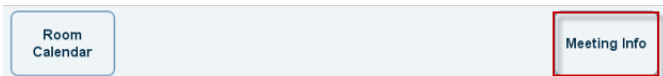


FIG. 22 Meeting Command Bar - Meeting Info button

Press **Meeting Info** to view a detailed summary of the current meeting, or a meeting selected in the Room Schedule, in the *Meeting Details* window (FIG. 23): .

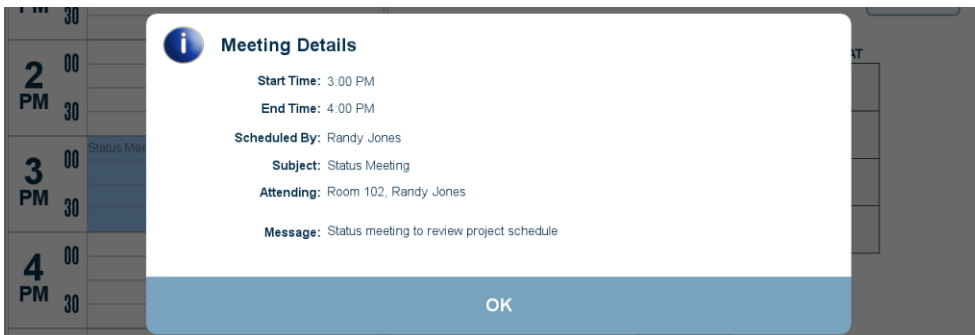


FIG. 23 Meeting Details window

NOTE: Alternatively, the *Meeting Details* windows can be accessed by selecting a meeting in the Room Schedule (see FIG. 20).

Extending a Meeting (Internal Panels only)

The *Extend Meeting* button is displayed on internal panels, when a meeting is in progress (FIG. 24):



FIG. 24 Meeting Command Bar - Extend Meeting button

1. During a meeting, press the **Extend Meeting** button on an internal panel to extend the current meeting by 15 minutes.
2. The system will prompt you to verify this action (FIG. 25):

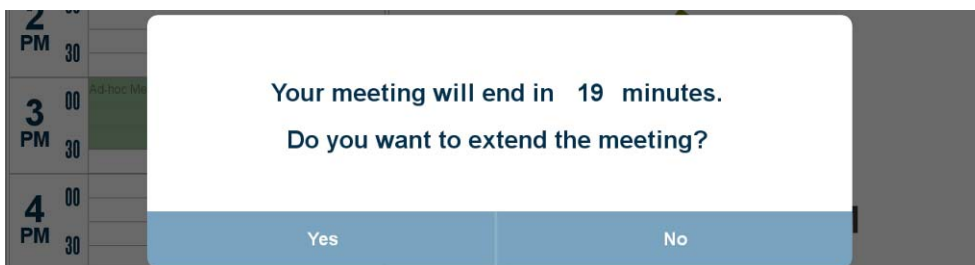


FIG. 25 Current Meeting page - Meeting Extension prompt

3. Press **Yes** to extend the meeting. The system will present a confirmation message - press **Dismiss** to remove the message, or wait 30 seconds for it to disappear automatically (FIG. 26):

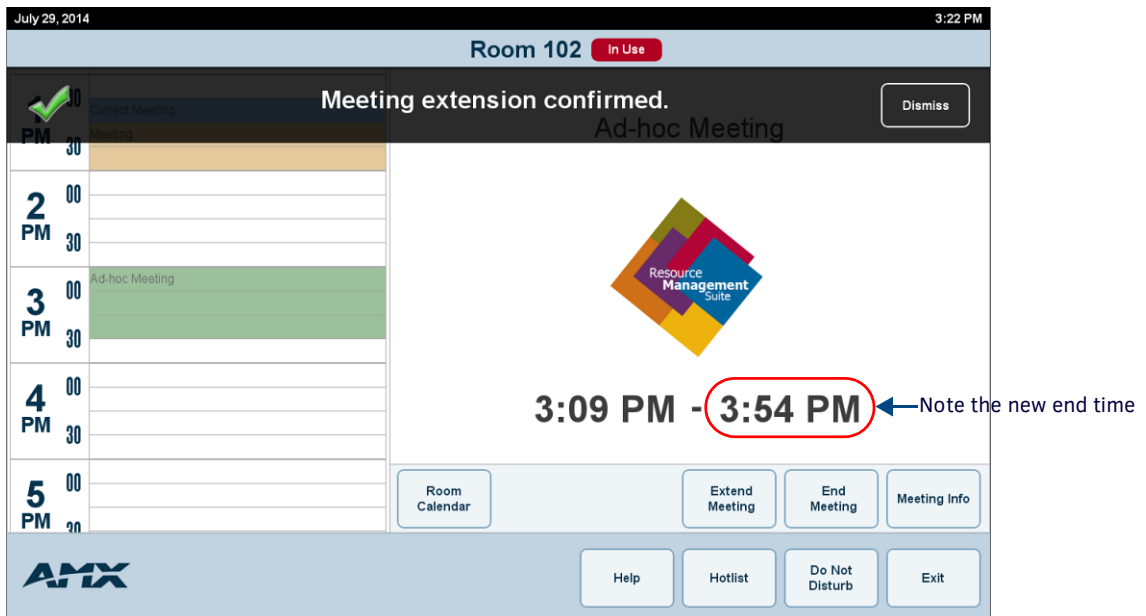


FIG. 26 Current Meeting page - Meeting Extension Confirmed message and updated end time

Ending a Meeting (Internal Panels only)

The *End Meeting* button is displayed on internal panel, when a meeting is in progress (FIG. 27):



FIG. 27 Meeting Command Bar - End Meeting button

1. During a meeting, press the **End Meeting** button on an internal panel to end the meeting. The system will prompt you to verify this action (FIG. 28):

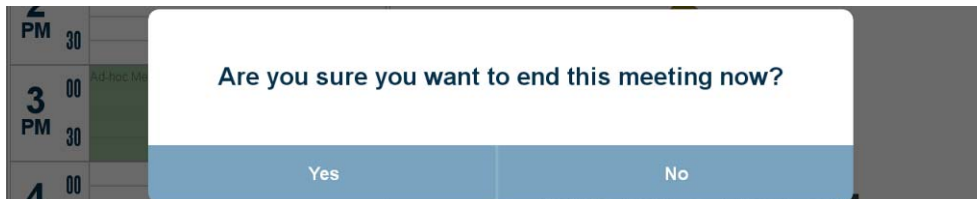


FIG. 28 Current Meeting page - End Meeting prompt

2. Press **Yes** to end the meeting immediately.
Note that when a meeting is ended, the location status changes to *Available*.

Scheduling Meetings - G5 Panels

Overview

This section describes using the RMS Enterprise G5 touch panel pages for a scheduling plug-in. Press the **Scheduling** button on the Home page to open the *Scheduling* page for this location (FIG. 29):

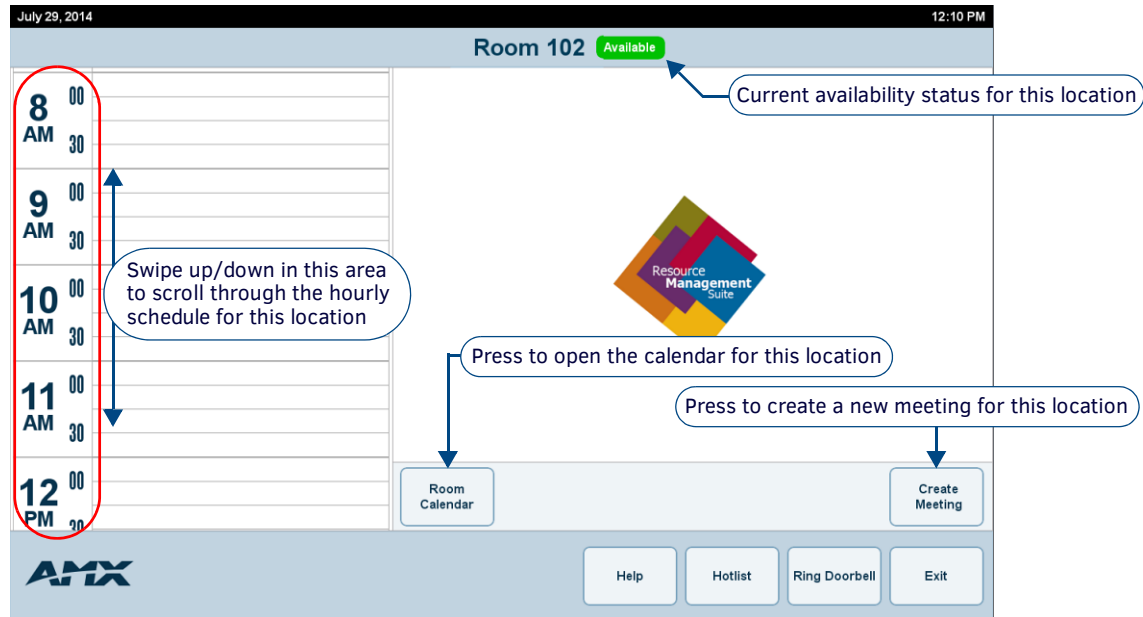


FIG. 29 Main Scheduling page (external panel shown)

Use the options on this page to view and schedule meetings for this location.

There are two ways to reserve the room for a meeting:

- Begin the meeting immediately (see *Scheduling a Meeting for Now* on page 14)
- Schedule a meeting reservation for later today (see *Scheduling a Meeting for Later Today* on page 16).

Notes on Scheduling

- Meetings scheduled at the panel are non-repeating meetings only.
- Meetings can be scheduled at the panel for later times in the current day only. Meeting reservations for future dates must be done via the scheduling application being used with RMS (i.e. Google, Exchange EWS or Lotus Notes Domino).
- Due to the time required by the trolling service to update locations and panels, please allow approximately 15 minutes for meetings booked from a scheduling application to show up on the touch panel's Scheduling page.

Scheduling a Meeting for Now

To schedule a meeting reservation to begin immediately in this location (only if the location status indicates "Room Available" as shown in FIG. 29):

1. Press **Create Meeting** to invoke the prompt shown in FIG. 30:

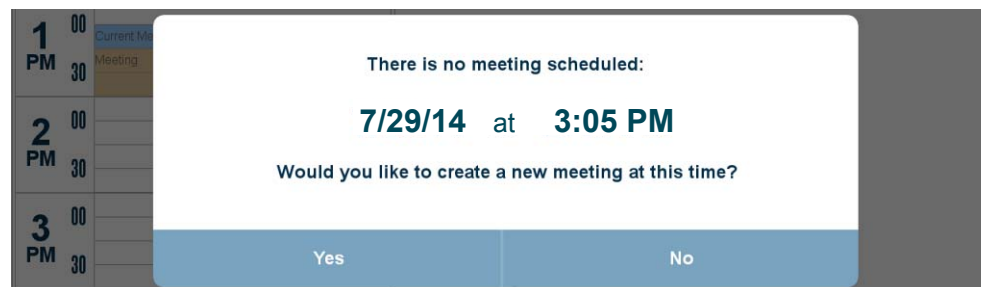


FIG. 30 System prompt - Creating a New Meeting

2. Press **Yes** to open the *Reserve Meeting* page (FIG. 31):

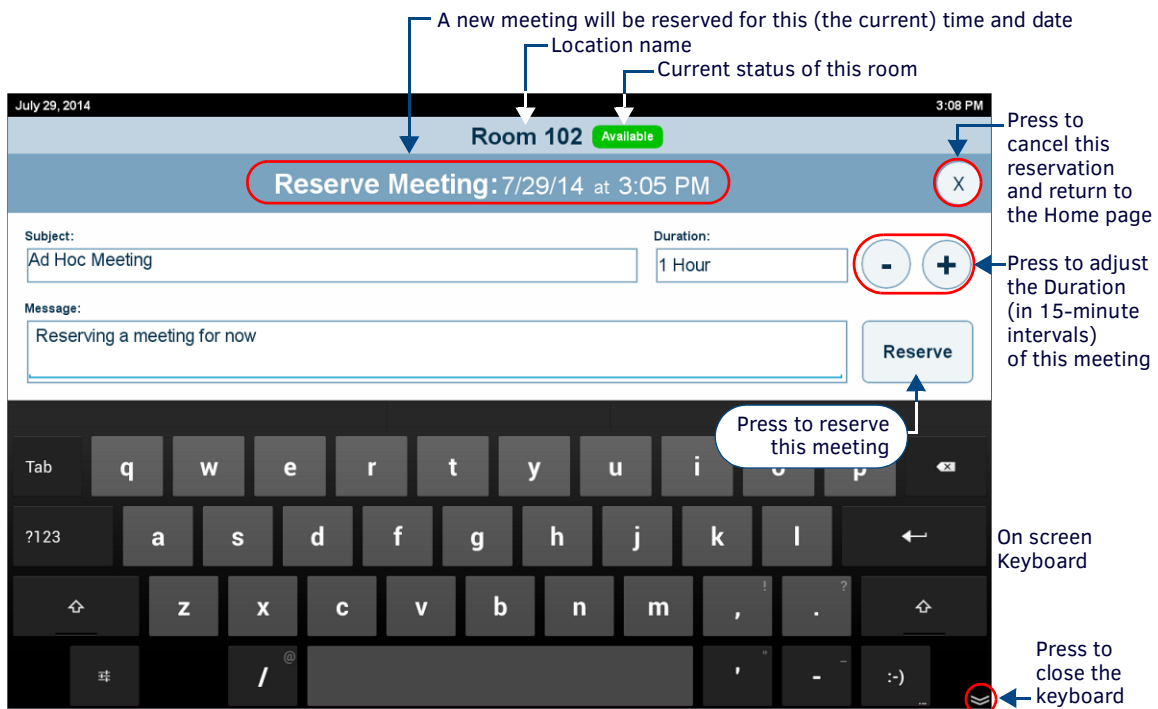


FIG. 31 Reserve Meeting page

- Use the options on this page to enter the *Subject* and a descriptive *Message* to describe the meeting (touch within each field to select and edit), as well as define the reservation's *Duration* (in minutes, the default is 60).
 - Location Name:** This read-only field indicates this location's Name.
 - Reserve Meeting (Date and Time):** This read-only field indicates the current date and time. The time displayed here represents the start time for this meeting.

Reserve Meeting Page Options	
Subject:	Use the on-screen keyboard to enter a Subject for this meeting. This is the text that will be displayed on the touch panel in reference to this meeting.
Duration	This field indicates the meeting's duration. By default, all meetings are set for one hour. Use the plus and minus buttons to decrease or increase the duration time in 15-minute increments.

Message	Use the on-screen keyboard to enter a descriptive message for this meeting. This message can be seen in the <i>Meeting Details</i> page. Note that while the Message field is not required for the scheduling troller, it can be helpful for users.
Reserve	Press to reserve a meeting according to the information in this page.

NOTE: The Reserve Meeting page closes automatically after 3 minutes.

- Press **Reserve** to reserve the meeting. RMS will display a message to verify that the meeting has been requested (FIG. 32):

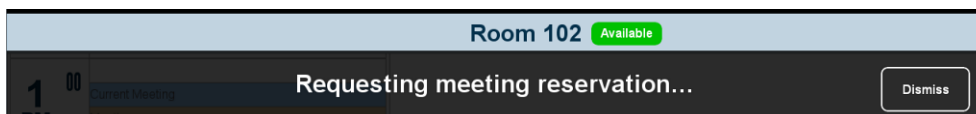


FIG. 32 Requesting Meeting Reservation page

NOTE: Press Dismiss to close this message. This does not cancel the reservation request, it only dismisses the message. Note that the message will be dismissed automatically after several seconds.

- Allow several seconds for the meeting reservation to be processed.

NOTE: Meeting reservations cannot be canceled once the Reserve button is pushed.
- When the reservation has been confirmed, RMS will indicate the information entered for this meeting, in the *Current Meeting* page (FIG. 33):

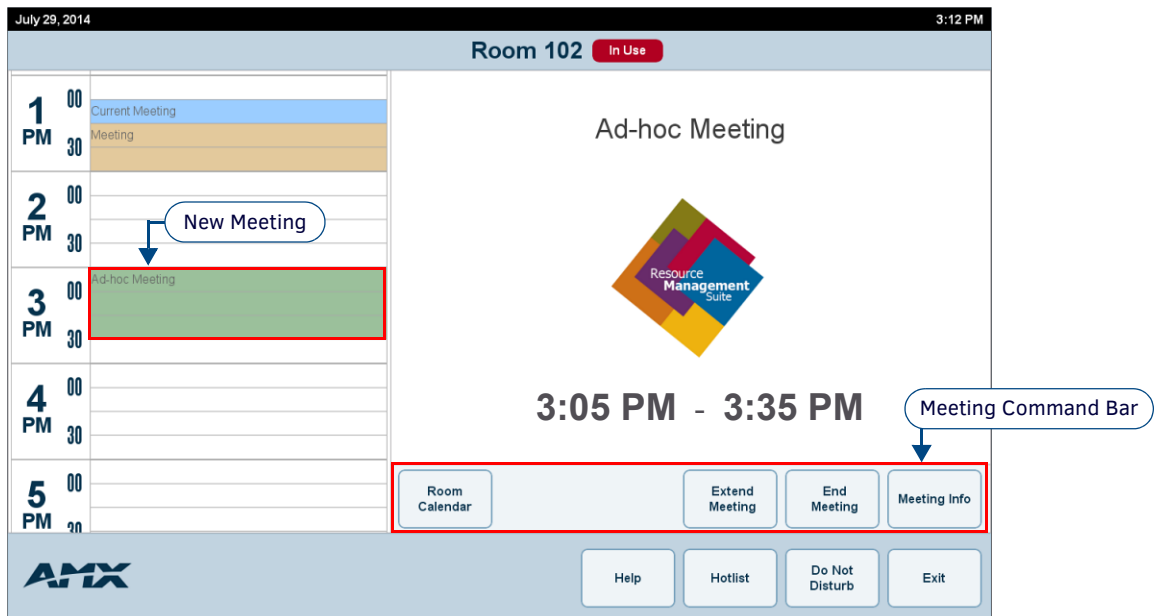


FIG. 33 Current Meeting page (internal panel shown)

Note that the new meeting is now indicated on the hourly schedule for this location. Also, when the meeting is reserved to start now, the room's status changes immediately to **In Use**.

Use the Meeting Command Bar buttons to access meeting-specific functions that are also specific to the panel's location (internal or external). See the *Using the Meeting Command Bar Buttons* section on page 11 for details.

Scheduling a Meeting for Later Today

Meetings can be scheduled for later times in the current day, as described below.

NOTE: Meetings cannot be scheduled from the touch panel for any other days. Future meeting reservations must be done via the scheduling interface being used with RMS (i.e. Google, Exchange EWS or Lotus Notes Domino).

To schedule a new meeting reservation in this location for a later time this day:

1. In the Room Schedule, press on an available time slot to specify the meeting's start time.
 - Swipe up or down in the hourly schedule to scroll up and down (from 12AM to 12PM).
 - Note that in the room schedule, you can select times in 15-minute blocks (FIG. 34):

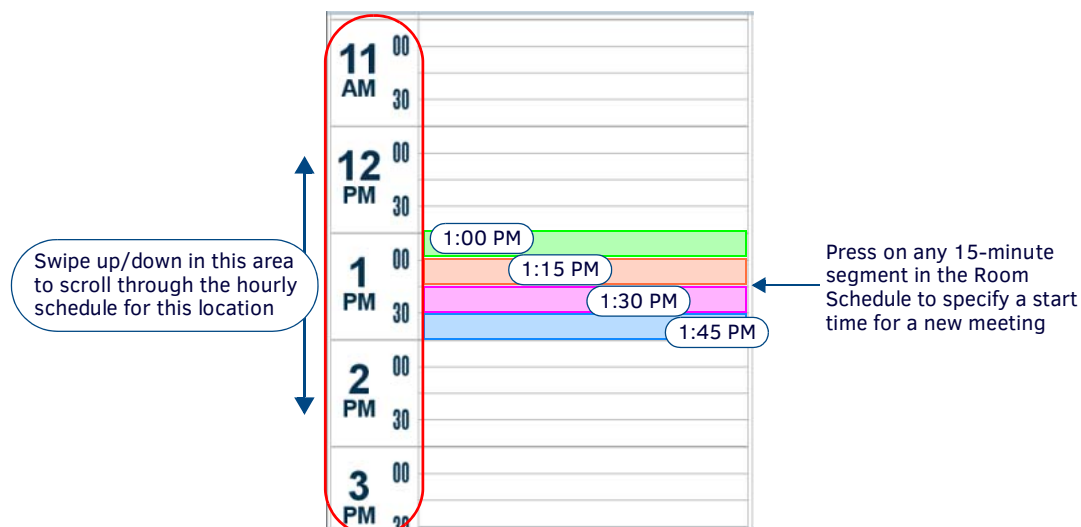


FIG. 34 Scheduling a start time for a new meeting reservation

2. RMS will prompt you to start a new meeting at the selected time. For example, FIG. 35 shows that a meeting has been requested for 4:00 PM on 7/30/2014:

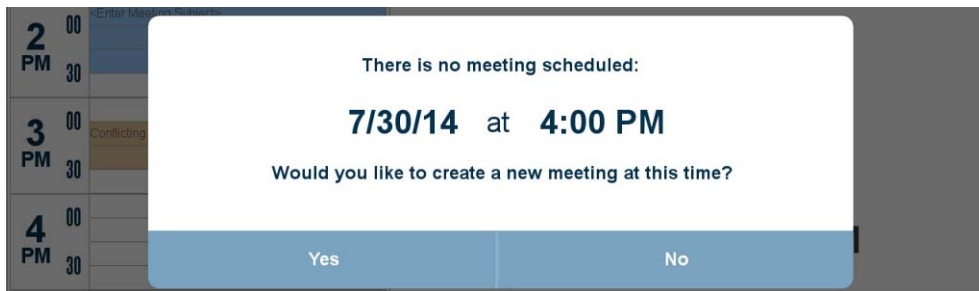


FIG. 35 Prompt to create a new meeting at the selected time

3. Press **Yes** to open the *Reserve Meeting* page (FIG. 36).

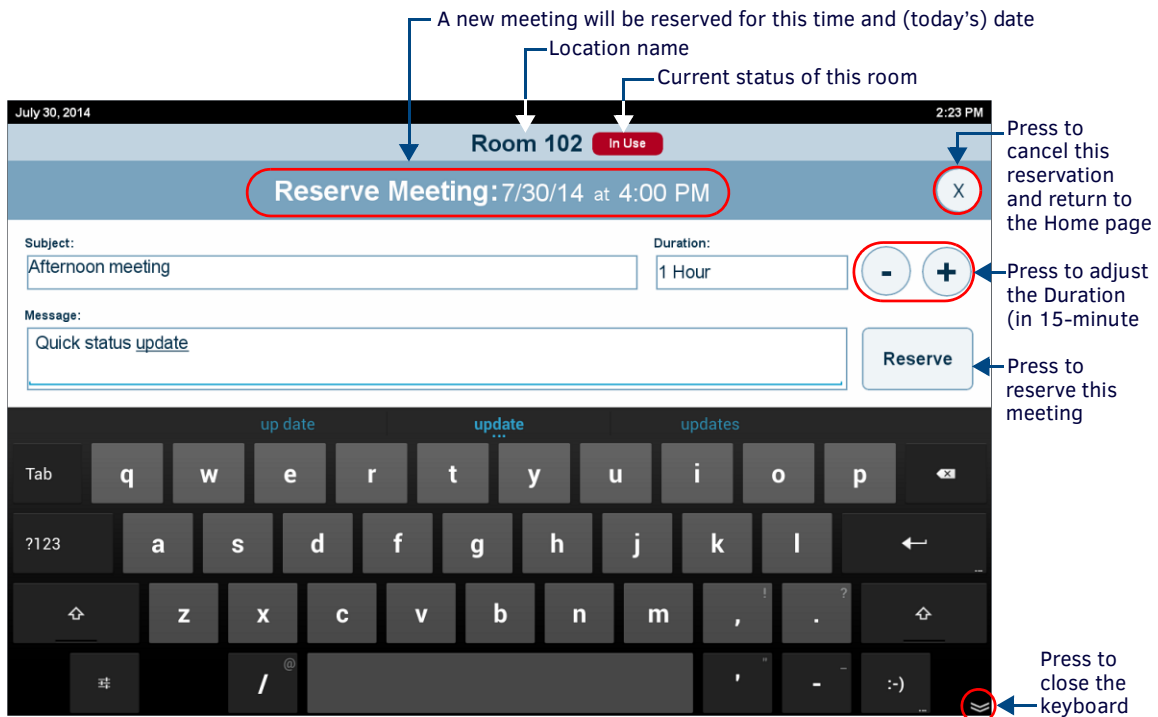


FIG. 36 Reserve Meeting page

4. Use the options on this page to define the reservation's duration, as well as the Subject and a descriptive Message to describe the meeting (see the *Reserve Meeting Page Options* table on page 15).

NOTE: *The Reserve Meeting page closes automatically after 3 minutes.*

5. Press **Reserve** to reserve the meeting.
 - RMS will display a message to verify that the meeting has been requested (FIG. 37):

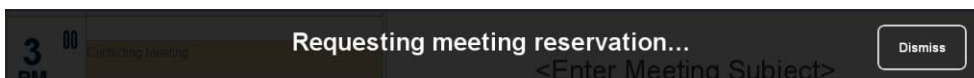


FIG. 37 Requesting Meeting Reservation message

- RMS will then display message to confirm that the reservation was successful (FIG. 38):

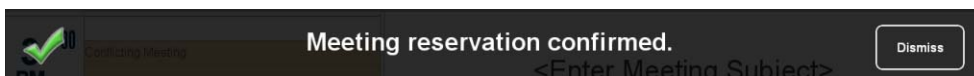


FIG. 38 Meeting Reservation Confirmed message

NOTE: *Press the Dismiss button in either of these messages to close the message bar if desired. This does not cancel either the request or confirmation of the new meeting. Note that these message bars are dismissed automatically after several seconds.*

6. Once the reservation has been confirmed, the new meeting is represented in the Room Schedule (FIG. 39):



FIG. 39 Example of a new meeting reservation in the Room Schedule

NOTE: It is possible to receive a message indicating that the reservation request has been denied, as a result of a scheduling conflict, or problem with the scheduler.

Use the Meeting Command Bar buttons to access meeting-specific functions that are also specific to the panel's location (internal or external). See the *Using the Meeting Command Bar Buttons* section on page 11 for details.

G5 Touch Panel Date Settings

In order to ensure that the date displayed on the RMS G5 touch panel is correct relative to the local time zone, it is necessary to set the G5 panel to rely on the NetLinx Master for date and time information, rather than on network-provided time (via NTP), which is the default for G5 panels. This is done via the *Settings* menu (Date & Time) on the panel.

Refer to the *Modero X® Series G5 Touch Panels Programming Guide* for details on using the Settings menu.

1. To access the *Settings* menu, press and hold the **Sleep/Settings** button on the touch panel for 3 seconds. This button is located at the center of the top panel.
2. In the settings menu, select **SYSTEM > Date & Time** to open the *Date & Time* page (FIG. 40). The options in this page allows setting and adjusting of time and date information on the Modero X Series G5 touch panel.

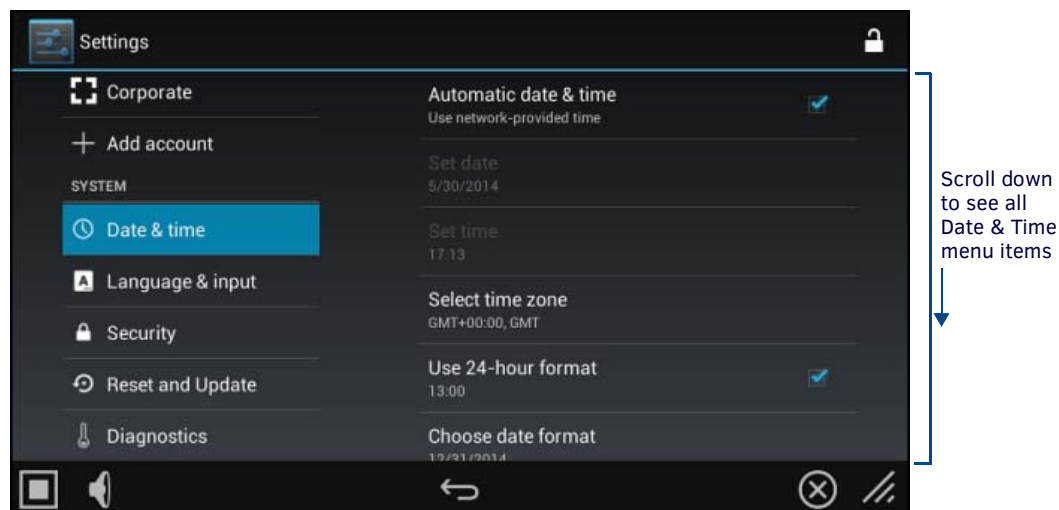


FIG. 40 Date & Time page

3. By default, G5 panels use network-provided time (via NTP). Disable (un-check) the **Automatic date & time** option. By un-checking the *Automatic date & time* setting, the panel will rely on the master's date/time configuration instead of NTP. This ensures that if the timezone in a location is changed in RMS, the date/time on the RMS panel will reflect the change.
4. Reboot the panel for this change to take effect: In the *Settings* menu, select **INFO > Maintenance > Reboot**.



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