EMS Scheduling Integration v8.5

for v8.5, v9.0, and v10.0 systems

⚠️ Important changes are listed in Document Revision History at the end of this document.

Contents

What is the EMS Scheduling Integration add-on?

The EMS Scheduling Integration add-on creates system schedules based on EMS room bookings.

Requirements

- You are running a v8.5, v9.0, or v10.0 system with the latest cumulative patch applied
- You are running EMS Platform Services v44.1 Update 25 or later
- EMS Platform Services must be enabled on the EMS Server

  TIP   For additional security, configure the web services' endpoint to be secure (https)
- You have network connectivity between the system and EMS servers
- You have downloaded **emsscheduling.addon**
- You have purchased and downloaded the EMS Scheduling Integration license
- Your system is backed up regularly to ensure the add-on's data is also backed up
- You have obtained EMS Integration Client credentials for the add-on to access the EMS Platform Services
- The building automation system (BAS) application must be configured to use secure communication (HTTPS)

See the "Installing an Add-on User Guide" on the Partner Community Website for the following:
- Installing an add-on
- Applying a license
- Running an add-on
- Upgrading an add-on

IT considerations

The following information may be useful to network administrators.

Client	Server	Default Port	Traffic
EMS Scheduling Integration add-on	EMS Platform Services	TCP/IP 443	EMS Scheduling Web Services RESTful API secured with TLS

This add-on communicates with an EMS Server using RESTful services provided by EMS Platform Services. These communications are performed using HTTP or HTTPS protocol with TLS, depending on the service endpoint configuration. During configuration, the add-on retrieves room lists for the user to select. During regular operation, the add-on retrieves room bookings for the selected rooms, at configured times.

The   EMS Server must be configured to enable the EMS Platform Services.

We recommend that you have a dedicated EMS® Integration Client account for the add-on to use to communicate with the EMS Platform Services server. Credentials for the Integration Client account are stored to a file by this add-on and secured using AES-128 encryption.

NOTE   This Integration Client account must have appropriate privileges to retrieve room types, booking statuses, room lists, and room bookings, but no more.

Configuring the EMS Scheduling Integration Services connection

Use the **EMS Connection Settings** pane on the **Configuration** tab in the EMS Scheduling Integration add-on to connect it to the EMS Platform Services server.

1 Enter the values for the fields listed in the table below.
2 Click **Save**.
   The add-on immediately attempts to connect using the credentials provided.

Field	Enter...
Service URL	The EMS Scheduling server URL provided by your IT administrator EXAMPLE: https://ems.yourcompany.com/EmsPlatform/
Client ID	Integration Client account Client ID
Secret	Integration Client account Secret

Configuring your site preferences

Use the **Application Settings** pane on the **Configuration** tab in the add-on to set your site's application preferences.

1 Enter the values for the fields listed in the table below.
2 Click **Update**.

Field	Enter or select...
Look Ahead Schedules	A value between 1 and 14; default is 3 NOTE Schedules are created for this number of days ahead.
Minimum Schedule Gap	A value in minutes between 15 and 120; default is 60 **NOTE** If the gap between two bookings is less than this number of minutes, the bookings are combined into one schedule.
Booking Statuses	One or more booking statuses to include in the schedule integration.
Room Types	One or more room types to include in the schedule integration. **NOTE** Users have the option to include inactive rooms in their room list using the **Include Inactive Rooms** checkbox.
Refresh Times	Up to 6 times during the day at which the system schedules are refreshed from the latest EMS data.

Configuring the EMS Scheduling Room Mappings

Use the **Room Mapping** tab in the EMS Scheduling Integration add-on to create associations between EMS rooms and system Area, Equipment, or Schedule Groups.

To enable EMS Scheduling at an Area, Equipment, or Schedule Group, you must create a mapping for that location.

💡 **TIP**   If multiple rooms are controlled by the same equipment, set up a scheduling group for each room in the BAS and make the controlling equipment members of each group. Then you can create a 1-to-1 mapping between the EMS rooms and their corresponding scheduling groups.

Best Practices: Only one scheduling method should be used at any Area, Equipment, or Schedule Group, whether it be from your system application or from this or any other scheduling add-on. Be aware that using more than one scheduling method at a location may yield unexpected results.

To add an EMS Room Mapping

In the **Select Room** pane on the **Room Mapping** tab, select a room. To filter the list of rooms, do either of the following:

- ○ Enter text, such as a room name or number, in the **Search** box.
- ○ Select an item from the **Building** droplist.

    💡 **TIP**   If a room has been added in the EMS system but does not appear in the **Room** list, click **Refresh Rooms**.

1 In the **Select Location** pane, select any schedulable area, equipment, or group.

2 Click **Map**.

  The new mapping appears in the **Mapped List** pane.

  💡 **TIP**   For a newly mapped room, click **Refresh Now** to create schedules immediately.

To remove EMS Room Mappings

1 Select any mappings in the **Mapped List** pane to remove.

  💡 **TIP**   Check the checkbox in the table heading to select or un-select all mappings in the list.

    NOTE When you click the checkbox, only the room mappings that are currently displayed are selected.

2 Click **Delete** in the lower left of the window.

3 Click **OK**.

NOTE   If an item in the **Mapped List** pane is red, either the Room has been removed from EMS® or the mapped location has been removed from the BAS system.

Scheduling rooms using EMS

After you have configured the add-on and mapped the rooms, you can reserve rooms as you normally would in EMS's scheduling software. The EMS Scheduling Integration add-on will then schedule the system equipment accordingly.

NOTES

- All schedules that you create in EMS's scheduling software appear in your system with a description containing "`EMS:`" followed by the `Building/Floor/Room` name.

- All schedules that you create in EMS's scheduling software are assigned a priority of Override in the system; this cannot be changed.

- If you have Optimal start in your logic, it performs as usual whether the schedule is configured in EMS's scheduling software or in your system.

- A newly scheduled, updated, or deleted schedule is reflected in the system when the next scheduled booking refresh occurs. To display it immediately, click **Refresh Now** on the **Mapped List** pane.

Document revision history

Important changes to this document are listed below. Minor changes such as typographical or formatting errors are not listed.

Date	Topic	Change description	Code*
11/17/205	Requirements	Updated for supported versions	A-D
8/22/22	To remove EMS Room Mappings	Revised note in step 1	X-PM-LO-R-LO
5/13/22	To remove EMS Room Mappings	Added note to step 1	X-PM-LO-R-LO
2/25/20	Legalease	All rights reserved statement	A-D
12/19/18	Requirements	Changed reference of "EMS Partner Services v44.1" to "EMS Platform Services v44.1"	AC-TS-JC-O-LO

* For internal use only