# RoomWizard™

Instructions for Lotus Domino Synchronization Software Installation

Steelcase®

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## Instructions for Lotus Domino Synchronization Software Installation

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# INTRODUCTION

## INSTALLING ROOMWIZARD IN SYNCHRONIZED MODE

Out of the box, RoomWizard is set to operate in classic mode using its own reservation functionality and data through a web browser. When you set RoomWizard in synchronized mode, your room reservation system becomes a combination of your Lotus Domino system and the RoomWizard LCD displays with the pertinent reservation information and touch screen functionality outside of each meeting room.

In order to achieve this synchronization, you will need to install synchronization software and configure the necessary components of your mail and web server.

The RoomWizard Domino Synchronization Software is designed to facilitate communication between a RoomWizard and a Domino server. A single installation of the synchronization software is capable of handling this communication for all RoomWizards simultaneously. Each RoomWizard represents a meeting room resource in the Resource Reservations Database.

This manual provides information necessary to install and configure the RoomWizard Domino Synchronization Software in a Domino environment. It is intended for the use of system administrators of Steelcase customers who are responsible for configuring the IBM Lotus Domino server environment.

Refer to the **RoomWizard System Manager Guide**, available at www.steelcase.com/roomwizard for the RoomWizard configuration steps that lead up to installing and configuring the synchronization software.

## RoomWizard Synchronization Software Requirements

This configuration overview outlines the required components for running the RoomWizard Domino Synchronization Software on Domino servers. The chapters that follow contain references and sample installation procedures required for each component. Additional detailed Lotus installation and configuration documents can be viewed and/or downloaded from:

http://www-306.ibm.com/software/lotus/

## Domino Servers Supported:

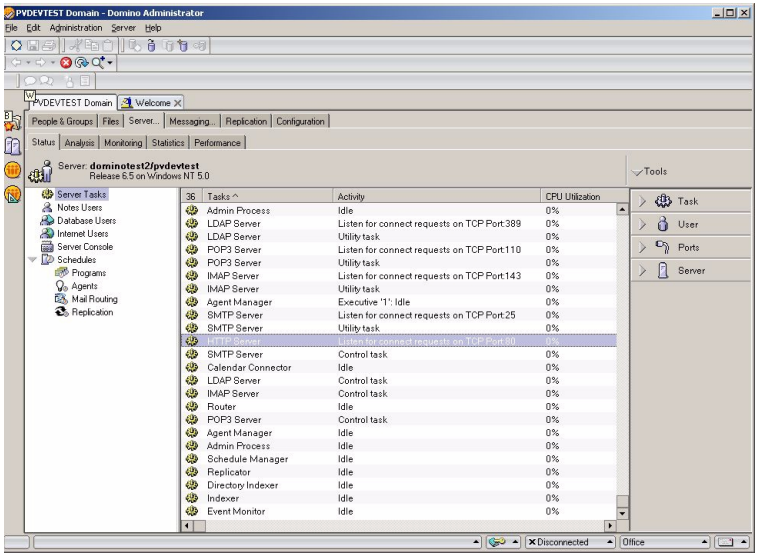
The RoomWizard Domino Synchronization Software requires one of the following environments:

- Domino Release 7.0.x
- Domino Release 8.0.x
- Domino Release 8.5.x
- Domino Release 9.0.x
- Domino clustered & domain environments, with limitations

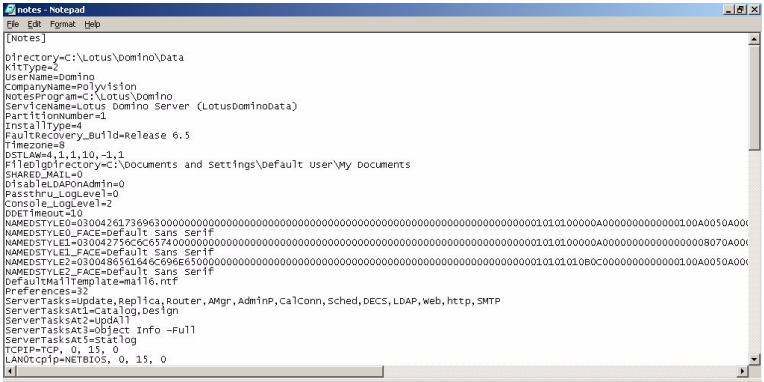
The Lotus Domino synchronization software is supported for Windows, Linux and IBM environments only.

## DOMINO HTTP SERVER

The RoomWizard Domino Synchronization Software requires that the same Domino server that runs the Calendar and Scheduling Server Tasks also run (utilizing the Resource Reservation database) the Domino HTTP process. It is also the location for installing the RoomWizard synchronization software database.



The HTTP task must be added to the **ServerTasks** line of the **Notes.ini** file. Refer to the Lotus Administrator's help database for specific instruction on configuring the Domino HTTP server. The server home page should be accessible from any browser within the Domain by typing in the FQDN or IP address.




## Domino Topology and Domain Configuration

The Domino Calendar and Scheduling System are based on an email "store and forward routing" model for reservations. Mail routing must be correctly configured for the servers and users in order for reservations to be created by the individual user. The RoomWizard Domino Synchronization Software requires that the Domino server places no requirements on the "Domain" topology of the Domino system.

Servers that contain the **RWConnector**, Resource Reservation database (described below), Domain directory (**names.nsf**), FreeTime (**busytime.nsf** or **clubusy.nsf**) and all user's mail files that will be scheduling and using resources with RoomWizards MUST be placed in each Server configuration document in the "Security" tab as "trusted servers" and "ACL entries" for the ID that signed the **RWConnector**.

**NOTE:**

In order to (1) display attendee information on the RoomWizard front panel, or (2) accomplish One-Click Publishing by harvesting whiteboard notes from a CopyCam™ or Thunder™, the user's mail files must be accessible to the account by which the synchronization software was signed. See "Synchronization Software Agent and Attendee Email Retrieval" on page 8

below for instructions and “Appendix B: What is One-Click Publishing?” on page 29.

### Synchronization Software Agent and Attendee Email Retrieval

This sections describes:

- Configuring user mail files for retrieval of attendee information.
- Setting up a limited access account for script/agent execution for improved security.

The limited access account for executing scripts/agent may be helpful even if you won’t be using the attendees feature for One-Click Publishing.

The RoomWizard Domino Synchronization Software is a Domino agent, which is like a small program in a Domino database. Agents need to be “signed” by an ID file. When the agent runs, it has the database access rights of the signing ID. An agent is signed by editing and saving it, or by signing the database using Domino Administrator. After an agent is signed, it does not require access to the ID file to execute, so it is not necessary to store the ID file on the server. There are also server settings that can limit the IDs that can execute certain types of agents on the server.

In the end, the ID that signs the agent must have “read” access to all mail files for the retrieval of attendee email addresses from the host’s calendar.

It works best to have an administrator group (a group is not a security entity, but rather it’s a list of user IDs), with “Manager” access to every database on the server, including mail files. In this scenario, the recommended way to implement the RoomWizard Domino Synchronization Software is to sign the agent with one of these IDs. This is how other Domino add-ons are typically setup when they need access to resources such as mail files. It is a safe and easy method. In many instances organizations create an ID file just for running agents, add it to the administrators group, and limit the server to only allow this ID to execute agents. By limiting who has access to this ID file, the organization can limit who can execute agents on the server.

A workaround is to create an ID for the RoomWizard Domino Synchronization Software, grant it “read” access to all mail files, and sign the RoomWizard Domino Synchronization Software agent with this ID. That requires some updating every time a Domino server is upgraded.

Before beginning these steps, make sure your ID has “Manager” access to all mail files and the RoomWizard Domino Synchronization Software database, or that you have “Full Access Administration” rights. You also need access to register new users, which is usually done from the Primary domain server or an Administration server.

1. Create an ID file for the RoomWizard Domino Synchronization Software; it does not need a mail file. In this example, the user is “RoomWizard Domino Synchronization Software/Your Domain.”
2. Update the ACLs of all existing mail files on all mail servers using Domino Administrator. Complete this on all mail servers as follows:
   - On the “Files” tab, open the mail directory on the server. By default this is named “mail.”
   - Select all mail files.
   - Select “Database - Manage ACL.”
   - Click “Add.”
   - Configure the options as follows:
     a. **Name**: the ID that signed the synchronization software “Room-Wizard synchronization software/Your Domain.”
     b. **User Type**: “Person.”
     c. **Access**: “Reader.”
     d. Deselect all checkboxes that can be deselected
     e. Click “OK.” This may take a few minutes.
6. Update the mail template ACL. This updates future mail users. This is completed on all registration servers and needs to be repeated every time Lotus Domino is upgraded on a server. If the administrator uses a local mail template, it also requires updating.
   - Within Domino Administrator, select the “Files” tab.
   - Change “Show Me” to “Templates Only.”
   - Find your mail template. Ask your Domino administrator which mail file is currently used.
   - Select “Database - Manage ACL.”
   - Click “Add.”
     a. **Name**: “[RoomWizard Synchronization Software/Your Domain]” including the brackets [ ].

b **User Type**: “Person.”

c **Access**: “Reader.”

d Deselect all checkboxes that can be deselected.

- Click “OK.”

4 Update the ACL in the synchronization software database to include “RoomWizard Synchronization Software/Your Domain” as “Designer.”

- Find the database in Administrator.
- Select “Manage ACL.”
- Click “Add.”

a **Name**: “RoomWizard Synchronization Software/Your Domain.”

b **User Type**: “Person.”

c **Access**: “Designer.”

d Select “Create LotusScript/Java agents.”

- Click “OK.”

5 Allow “RoomWizard Synchronization Software/Your Domain” to run restricted agents.

- From Domino Administrator, select **Configuration > Server > All Server document**.
- Double-click the server document for the web server.
- Click “Edit Server.”
- Click the “Security” tab.
- Add “RoomWizard Synchronization Software/Your Domain” to “Run restricted LotusScript/Java agents.”
- Save and close the server document.
- It may take several minutes for the server to pick up this change.

6 Sign the synchronization software agent with “RoomWizard Synchronization Software/Your Domain.”

- Switch to the “RoomWizard Synchronization Software/Your Domain” ID file created in step 1.
- Locate the RoomWizard Domino Synchronization Software in Domino Administrator.

a Right click.

b Sign…

c Active Users ID.

d All Design documents.

e Uncheck ‘update existing signatures only (faster)’ as this is the only signature needed.

The RoomWizard Domino Synchronization Software is designed for implementation on a Domino Domain configured for normal delivery of email amongst one or more Domino servers. While the RoomWizard Domino Synchronization Software database should work nominally in a clustered Domino environment, this requires additional configuration steps for optimization and security.

### DOMINO 7.0 THROUGH 9.0 with RoomWizard FW 4.6

1 Select the latest version of the RoomWizard Domino Synchronization Software (**RWConnector.nsf**).

- From the native operating system, copy the **RWConnector.nsf** database to the data subdirectory of the Domino server (i.e. c:\lotus\domino\data). The RoomWizard Domino Synchronization Software database can also be placed in a subdirectory (i.e. \RoomWizard) for convenience.
- Verify the RoomWizard Domino Synchronization Software database does not have "read only" attributes selected on the **File > Properties**.

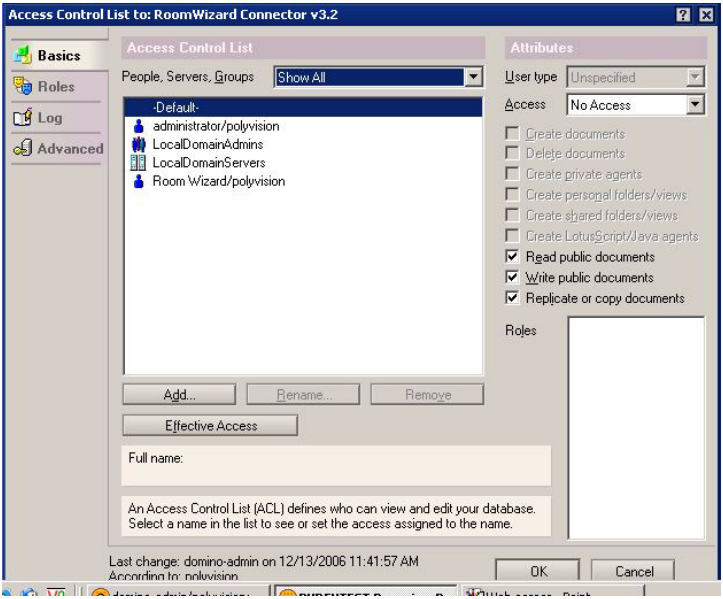
2 From a Domino Administration workstation, launch the Domino Administrator. Navigate to the "Files" tab for the server the RoomWizard Domino Synchronization Software has been installed on.

- Select the **RWConnector.nsf** database by right clicking on it.
- Select **Access Control > Manage**.
- You may receive a message saying "This database cannot be opened because a consistency check of it is needed."

- Add the server's hierarchical name to the ACL as "user type = server" and "access = manager." Also add any other groups such as "Administrators" with appropriate access levels. It is recommended

that the default access is set to “No Access,” but “Reader” will allow the RoomWizard to connect without an access account in the synchronization page.

- Remove the “Delete Documents” option from each ACL entry because the RoomWizard Domino Synchronization Software database contains a configuration document that should **not** to be deleted.

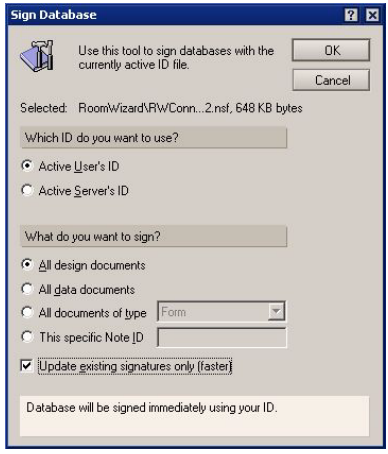



- Close the dialog window to save changes by clicking “OK.”

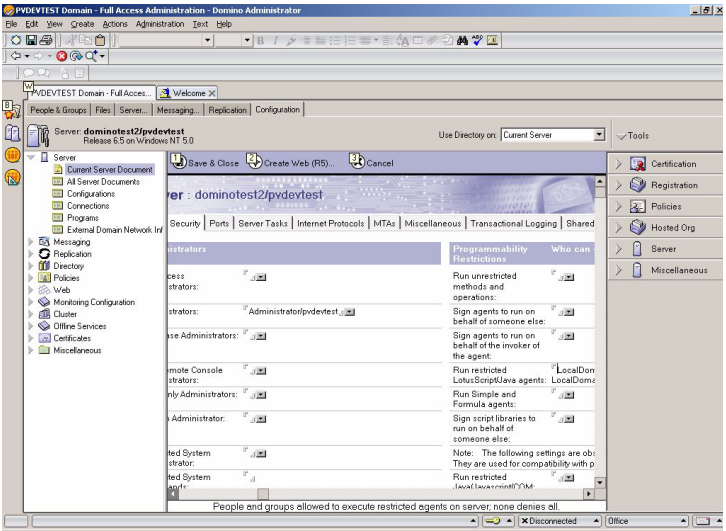
3 From the same Administrator window, select the **RWConnector.nsf** database by right clicking on it.

- Select “Sign.” Sign the RoomWizard Domino Synchronization Software database with a valid user ID file with access to the databases mentioned before. Domain administrator will not require

adding ACL. Make sure the user ID that signs the RoomWizard Domino Synchronization Software database has access rights to the necessary databases.

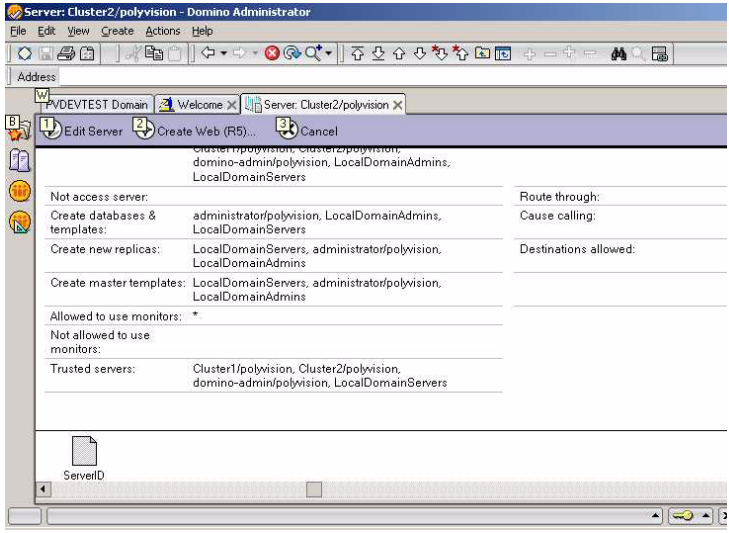


- From Domino Administrator, navigate to the “Configuration” tab for the current server. Within the “Current Server Document,” navigate to the “Security” tab. Be sure that the hierarchical name of the ID that signed the RoomWizard Domino Synchronization Software database and domain servers appear in the “Run restricted Lotus Script/Java Agents” field either by name or via inclusion in a group.




- If the ID that signed the RoomWizard Domino Synchronization Software database does not appear, click “Edit Server” and manually enter the hierarchical name of both the Server and valid user ID.

- While in the “Security” tab of the Current Server Document, check the “Trusted servers” so that each server that needs to share information has an entry for the other servers.



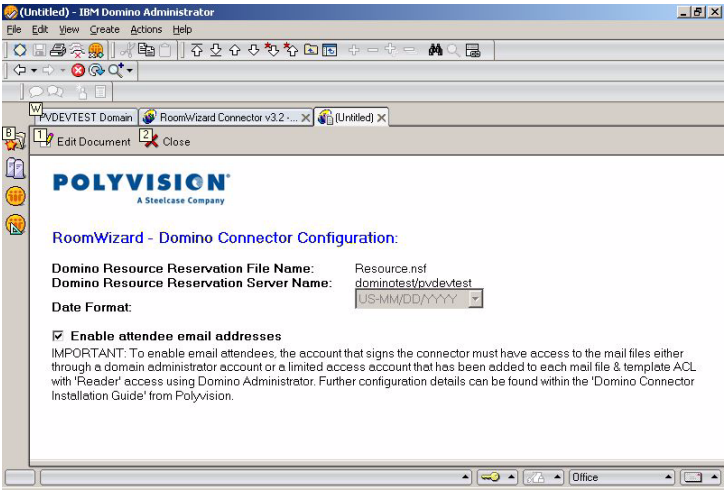

**NOTE:**

IMPORTANT: Servers must ‘trust’ each other in each server document if the synchronization software, resource, names, busy and mail databases are not on the same server. The ID that signed the **RWConnector.nsf** must have ACL rights for each of these databases across the Domino Topology and Domain.

4 Open the database from Domino Administrator. Manage the ACL according to your company’s policy. LocalDomainServers should have “Manager Access.”

- There is one document in the RoomWizard Domino Synchronization Software database, the “configuration” document. Do **not** delete this document or allow anyone delete rights in the ACL. Open the document in the view. Select document and click on the “Edit Document” button.

- Fill in the file name of the “Resource Reservation” database that was created on the server (i.e. **resource.nsf**). Also, enter the hierarchical name of the Domino server, which contains the resource reservation database into the “Server Name” field (Servername/Organization, i.e. Dominotest/Steelcase).



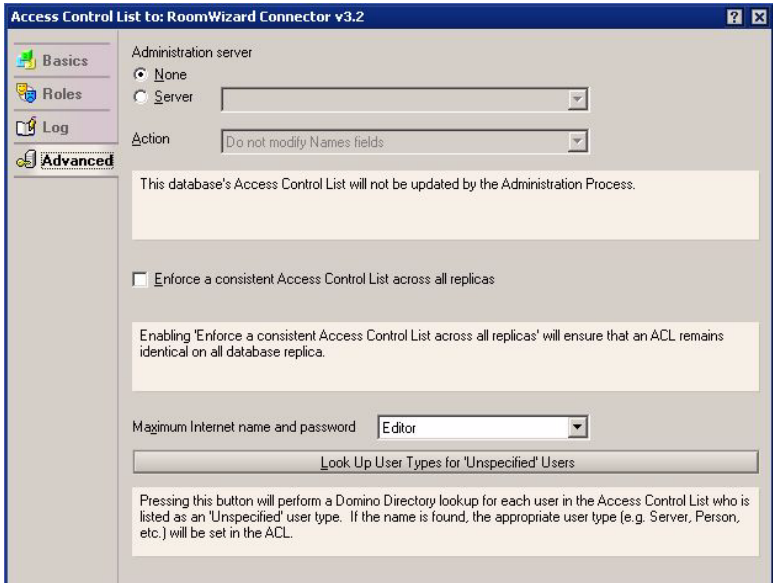

- Save and close the document. Close the database.

Each RoomWizard appliance needs to be configured with the URL of the synchronization software, the user id and password of the access account, as well as the mailbox ID and password for the room it synchronizes with.

The URL of the synchronization software, and the user ID and password of the access account can be the same for a group of RoomWizards. You can apply these settings to all RoomWizards you have potentially grouped during your RoomWizard installation process. (Refer to the ***RoomWizard System Manager Guide*** for information about configuring RoomWizard groups.) Configure the room ID and password for each RoomWizard individually.

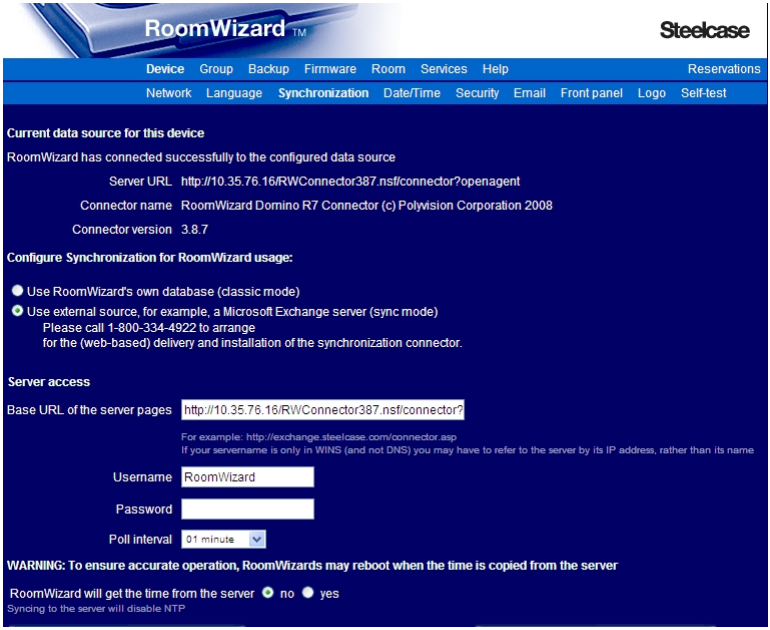
**NOTE:**

If default access is set to "reader" within the ACL for the RoomWizard Domino Synchronization Software, the web access account information is not needed. In the ACL for the synchronization software advanced tab – effective web access – will prohibit account access with access above this setting. So if your access account has manager and the setting is editor then web access will be prohibited.



To configure RoomWizard appliances:

1. Open a web browser and enter the IP address that has been allocated to the RoomWizard. This opens the RoomWizard's "homepage."
2. Click the "RoomWizard Setup" link in the bottom of the page.
3. Enter the Administrative password. The default password is "roomwizard."
4. Navigate to the "Room" tab and enter the name of the room into the "Room Name" field. This entry must exactly match the name of the room in the Resource Reservation database in an abbreviated format with both room name and site name (i.e. Executive Briefing Room/ New York). This displays the room and site name on the RoomWizard touch screen.
5. Select "Save on this Wizard."
6. Navigate to the **Device>Synchronization** tab.




7. Under "Configure Synchronization for RoomWizard usage," select "Use external source."

8 In the “Server Access” field, enter the Base URL for the server. For example, for synchronization software installed in the root Domino 6.x data directory use:
**http://dnsservername.mycompany.com/rwconnector_2_04.nsf/connector?openagent.**

9 If the synchronization software was placed into a subdirectory named RoomWizard, amend the URL:
**http://dnsservername.mycompany.com/RoomWizard/rwconnector_2_04.nsf/connector?openagent.**

As an option, you may use the IP address of the server in place of the FQDN.

10 If necessary, enter the “Username” and “Password” for access to the server pages.

11 Set the “Poll Interval” (60 seconds is recommended and is the default).

12 Select “No” for “RoomWizard will get the time from the server” as this is not yet an option for the current version of the Domino synchronization software.

13 Select “Save on THIS Wizard.”

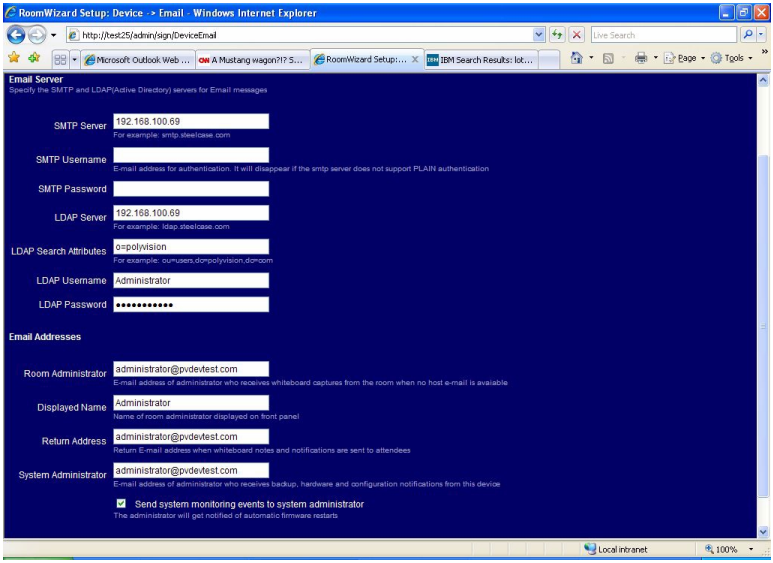
If successful, the top of the browser page should display the synchronization software name and the synchronization software version.

14 Scroll to bottom of page. Under “Calendar Access,” enter the name of the room in the “Room Identifier” field. Entry must be in an abbreviated format with both room name and site name (i.e. Executive Briefing Room/New York). No room password is needed for calendar access in Domino.

At this point, the RoomWizard Domino Synchronization Software should be installed and the RoomWizard appliance configured for use. Repeat RoomWizard configuration for each appliance in your system.

# CONFIGURING LDAP AND ROOMWIZARD EMAIL SETTINGS

This feature enables users to receive emailed alerts, and harvesting of notes from other PolyVision One-Click Publishing products. Refer to “Appendix B: What is One-Click Publishing?” on page 29.

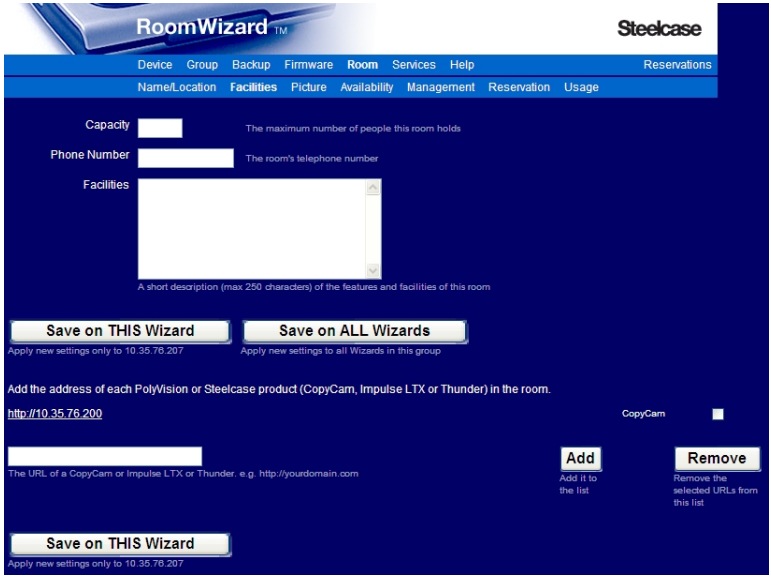



- The Domino SMTP Server Task must be running or added to the **Notes.ini** file.
- The “Domino LDAP Server Task” is optional, running or added to the **Notes.ini** file. This is for operating in classic mode and retrieving and checking email addresses.
- From the RoomWizard Administrative pages, navigate to **Device > Email** tab.
  - **SMTP server**: Enter the FQDN or IP address for the Domino server running the SMTP task.
  - **SMTP user name and password**: Leave this blank.
  - **LDAP server**: Enter the FQDN or IP address for the Domino server running the LDAP task. This is optional for operating in classic mode and retrieving and checking email addresses.

- **LDAP search attributes**: enter your company name as O=organization. This allows RoomWizard to query the LDAP task for email addresses.
- **Email addresses**: Enter the information for the person responsible for administration. This will send alerts and RoomWizard errors to the administrator.

To add a CopyCam or Thunder system for One-Click Publishing:

- Navigate to **Room > Whiteboards**. (If using firmware version 3.2 or higher, this is found in **Room > Facilities**.)
- Enter the FQDN or IP address of the whiteboard.
- Click “Add.”



# Resources and Troubleshooting

## Resources

Please call 1.800.334.4922 for assistance or to arrange for the web-based delivery and installation of the synchronization software.

A 'Connector Test' XML is available for troubleshooting synchronization software issues. If an error occurs during testing, select 'view source' from the file menu for details. If the error is not clear, contact Steelcase Technical Support at: 1.800.334.4922.

## Troubleshooting

1. The RoomWizard Domino Synchronization Software is not synchronizing with the Domino server.
   - Can the server be accessed in a web browser by typing the 'server access URL'?
   - If this does not produce an XML page, but rather a login prompt, attempt to login with the access account information. The server document has an option for more name variations.
   - If an error retrieving page or not accessible error occurs, try typing in FQDN or IP for the server. This should produce the RoomWizard homepage. If not, check server task for HTTP running.
   - If the HTTP task is running but still not able to access the homepage, try restarting server.
   - If the RoomWizard homepage is still not appearing, check the IP address on the server and DNS entries.
   - Does the "access account" have higher access then allowed in the advanced tab within the synchronization software's ACL?
2. Placing the synchronization software and **resource.nsf** on different servers.
   - Check the server document (**Security > Trusted Servers**), on both.
   - Are the location, name, server, and organization entered correctly into the synchronization software document?

- Are the servers accessible across the domain and from the same certification process?

3 The Server is busy with requests slowing down other user activities.

- Decrease the “Poll interval” on the RoomWizard **Setup > Device > Synchronization** page.
- Place fewer RoomWizards on the server and have the other RoomWizards sync through another server.

## Technical Notes

More information is available from IBM Lotus site:

http://www-306.ibm.com/software/lotus/

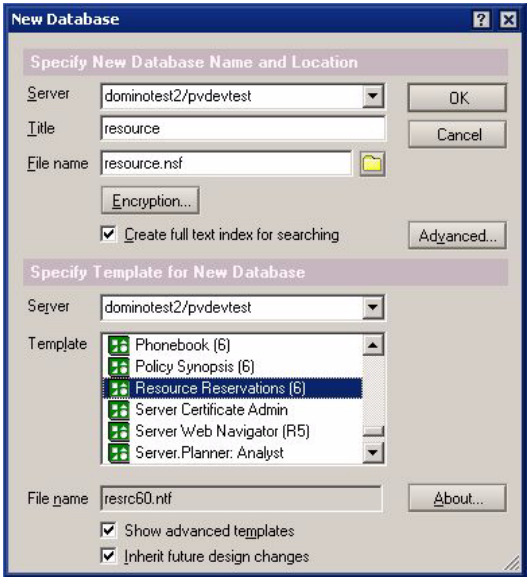
The “Extract calendar details” option in the Domino Configuration document is available after selecting “Use these settings for all servers” for Domino R6 and later.

**WARNING**

IMPORTANT: There are significant changes between Domino R6 and R7 in how the resource reservation database updates busytime and autoprocesses meeting requests. These need to be identified during or after upgrading from R6 to R7 for accurate scheduling to occur, specifically updating the resourceDB with the R7 template.

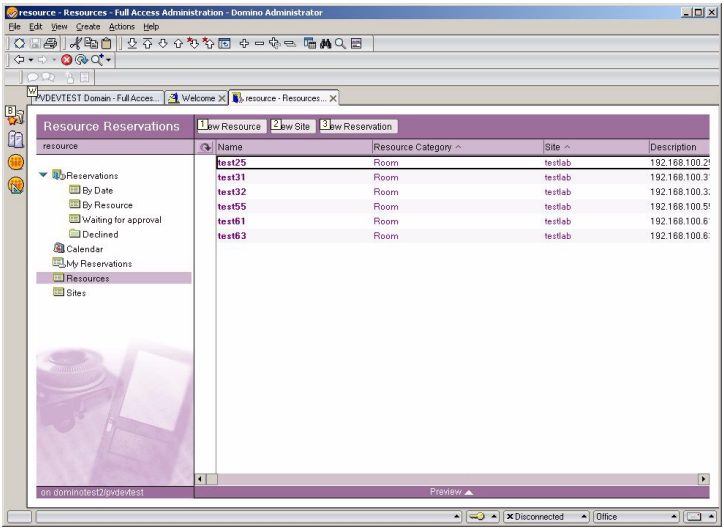
# APPENDIX A: DOMINO CALENDARING AND SCHEDULING

RoomWizard integrates with the Resource Reservations template (**resrcXX.ntf** where XX is the version number for Domino). You can create a new database (typically named **resource.nsf**) based on the resrcXX.ntf template. This database must be located on the same server that has the RoomWizard Domino Synchronization Software database. HTTP must be configured on this server as well, test web access by typing the FQDN or IP address into a web browser. Take all necessary security precautions for the server and its databases.




1. Configure the Room Reservation database according to Lotus specifications.
2. Complete at least one “Site” document and one “Room” document. Write down these names precisely for use in the RoomWizard configuration. Domino refers to each room by a hierarchical name that combines the room name and the site name.

For example if the room was named “Executive Briefing Room” and the site was “New York”, Domino would view the name as “Executive Briefing Room/New York”. This hierarchical name for the room must exactly match the name of the RoomWizard in its setup pages.




- Verify that Domino has completed setting up the room reservation system by opening the Lotus Administrator and looking in the Domino Directory (Name and Address Book) under the “People and Groups” tab. Select the icon on the left navigator for “Mail-In Databases and Resources.” Expand the “Rooms” twisty and see if the name of the Room is listed. If not, open the server’s console window and execute the command on the server, “**tell adminp process all**”. This should result in the addition of the Room into the previous “Mail-In Databases and Resources” view.
- Test by creating a reservation in a user’s calendar and schedule the room as well. This meeting (if successful) will appear in the user’s calendar and in the default view of the Resource database created. It should be noted that creating a reservation in the Reservation Database itself is not a valid test of the system. The RoomWizard Domino Synchronization Software has been tailored to integrate with the Room Reservation database and its creation of “Reservation”

documents from a Lotus client. Creation of “Reservation” documents within the Reservation database is not supported.

**NOTE:**

Room scheduling may not be available immediately and may take some time before reservations can be set for testing. Console command ‘tell adminp process all’ or restarting the server, may resolve this immediately.

# Appendix B: What is One-Click Publishing?

One-Click Publishing merges the convenience of e-mail with the power of the Steelcase note-capturing technology. This feature of RoomWizard enables you to schedule your meetings with RoomWizard, take notes during that meeting on a PolyVision interactive whiteboard, and have those notes emailed to all meeting invitees automatically at the end of the meeting.

Start with RoomWizard to schedule your meeting time and location, and invite attendees.

Use a One-Click Publishing product to capture your notes, sketches, and ideas using CopyCam Pro Image Capturing System.

Create and capture notes as usual on your PolyVision product. With the touch of a button at the end of the meeting, or with each capture, RoomWizard harvests your notes and automatically sends them directly to the e-mail inboxes of each meeting attendee. Notes arrive looking the same as they did in the meeting, helping to retain contextual memory, promote more efficient meeting closure, and to allow future meetings to continue where they left off.

# APPENDIX C: Security changes in Domino

**Security changes in Domino 8.5.1 (Fix Pack 5 and later), Domino 8.5.2(Fix Pack 4 and later), Domino 8.5.3(Fix Pack 6 and later) and Domino 9.0.1 (Fix Pack 3 and later)**

The later versions of Domino Server with the Fix Packs described above now utilize a TLS authentication handshake when connecting to secure (https) Webpages in a Domino environment. This change affects all https based Lotus Connectors but not unsecure (http) Lotus Connectors.

RoomWizards running Firmware 4.5.1.0 and earlier utilize an SSL based handshake that is incompatible with the later versions of Domino with the Fix Packs mentioned above. RoomWizards running these Firmware versions with fail to authenticate with https based Lotus Connectors residing on Domino Servers with these later Fix Packs.

RoomWizards running Firmware 4.6 and earlier utilize a TLS based handshake that is compatible with the later versions of Domino with the Fix Packs mentioned above. RoomWizards running Firmware 4.6 and later versions with successfully authenticate with https based Lotus Connectors residing on Domino Servers with these later Fix Packs.

This change in the handshake protocol should be a determining factor in what version of Firmware the RoomWizards should run on in Domino Server environments that utilize https based connectors.

# APPENDIX D Timezone Values in notes.ini file

## The UseNotesTimeZone value in the notes.ini file and how it functions with the Domino Service

Domino Servers that run the service through a Windows Server will have the notes.ini value UseNotesTimeZone set to "0" by default. With this setup the Time Zones, DST Laws, and DST Value will be configured automatically through the Windows environment and the notes.ini file will be updated accordingly to reflect this. Running the Domino Server service through Windows will ensure that all Date and Time settings will never require manual editing of any sort as long as the UseNotesTimeZone in the notes.ini file is set to "0" by default.

Note: If the UseNotesTimeZone value is missing this implies a "0" value.

Domino Servers that do not run the Domino Server service via Windows will often have notes.ini value UseNotesTimeZone set to "1". This occurs often in Linux and IBM environments, as well as Windows environments where the Domino Server service is not run directly through Windows. When this value is set to 1 the Time Zones, DST Laws, and DST Value will not be configured automatically through the operating system and will need to be edited manually. Using this value is considered a legacy feature and is not recommended.

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