



SMART TeamWorks Server 3.0

INSTALLATION AND CONFIGURATION GUIDE

FOR IT ADMINISTRATORS

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Chapter 1

Welcome

This guide explains how to install and configure SMART TeamWorks Server.

This guide is intended only for System Administrators and others experienced with deploying and administering software in a networked environment. To use this guide, you must have:

- Knowledge of IT terminology such as “registry” and “domain controller”
- Knowledge of basic administrative tasks in the operating system
- Knowledge of managing IIS Web Servers and Microsoft SQL servers

Installing SMART TeamWorks Server and Connected edition

SMART TeamWorks Server provides additional capabilities in SMART TeamWorks Connected edition and SMART TeamWorks Contributor apps. This guide describes the process for installing and configuring the SMART TeamWorks Server and its components. Once you finish this guide, use the *SMART TeamWorks installation and configuration guide for Room and Connected editions* to install SMART TeamWorks Connected edition in your organization’s meeting rooms.

This guide describes the process for installing and configuring the following components of the SMART TeamWorks Server:

- The SMART TeamWorks meeting server
- The web portal for SMART TeamWorks Server

Chapter 2

Preparing for installation

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Server requirements

Before installing the SMART TeamWorks Server, ensure your organization's on-premise or cloud-based SQL and web servers meet the following minimum requirements:

Server	Requirements
Microsoft® SQL server®	<p>Minimum requirements:</p> <ul style="list-style-type: none">• Microsoft Windows Server 2012 R2 Standard x64• Microsoft SQL Server 2014 Express x64 <p>Recommended:</p> <ul style="list-style-type: none">• Microsoft Windows Server 2016 Standard x64 or later• Microsoft SQL Server 2016 Standard x64 or later
Web server	<p>Microsoft Windows Server 2016 Standard Edition x64 8 GB RAM 100 GB HDD 20 Mbps internet connection</p> <hr/> <p>NOTE</p> <p>For the best performance, use a stable fiber optic connection at its maximum available speed.</p> <hr/>

Other requirements

SMART TeamWorks Connected edition:

- SMART TeamWorks Server should be installed with the most recent version of SMART TeamWorks Connected edition.

Third-party programs:

- SQL Server Management Studio
- SQL Server configuration Manager

Network access requirements:

- Two public IP addresses and the ability to create Domain Name Servers (DNS)
- Network access to the organization's Microsoft Exchange server

Downloading the installation files

Before you begin to install and configure the SMART TeamWorks Server, download and extract the installation files from the SMART website.

To download the installation files

1. In a browser, go to home.smarttech.com/interactive-displays-for-business/teamworks/download.
2. From the *Select your version* drop-down list, select the latest version of SMART TeamWorks Server.
3. Select **I've already purchased a license** and chose whether or not you'd like to receive emails from SMART.
4. Click **DOWNLOAD - WINDOWS**.
5. Extract the downloaded file to a folder on your computer. After the extraction, the folder contains five EXE files.
6. In that same local folder, create the following sub-folders:
 - RMS Connector for Exchange
 - RMS Connectors Configurator
 - RMS Database Scripts
 - RMS Meeting Server, Compact Edition for IIS
 - RMS Web Portal for IIS

7. Run the **RMS_Connector_for_Exchange.exe** file, enter the path to the **RMS Connector for Exchange** folder you created in the previous step, and click **Extract**.
8. Repeat step 7 for each EXE, extracting each EXE file to the corresponding folder you created in step 6.

RMS Database installation

Before installing the SMART TeamWorks Server database, complete the following steps:

1. Set up server authentication
2. Create a new user with SQL authentication.
3. Create a new database using the collate *Latin1_General_CI_AI*.
4. Populate the new database.

These steps are described below.

To set up server authentication

1. Open *SQL Server Management Studio*.
2. In the Object Explorer, right-click the server node and select **Properties**.
3. On the *Security page*, select **SQL Server and Windows Authentication mode**.
4. Click **OK**.

To create a new user with SQL authentication

1. Open *SQL Server Management Studio*.
2. In the Object Explorer, browse to the **Security > Logins** folder.
3. Right-click the *Logins* folder and select **New Login**.
4. Complete these actions:
 - Enter a Login name and password

TIP

Record these credentials for easy reference. You will need them later in this process.

- Select **SQL Server Authentication**.
 - Clear the **Enforce password policy** check box.
5. Click **OK**.

To create a new database

1. Open *SQL Server Management Studio*.
2. In the Object Explorer, browse to the **Databases** folder.
3. Right-click the *Databases* folder and select **New database**.
4. Complete these actions:
 - On the *General* page, enter a name for the database (for example, **TWDatabase**).
 - On the *Options* page, select the collate *Latin1_General_CI_AI*.
5. Click **OK** to create the new database.
6. In the Object Explorer, browse to the new database folder, and then to **Security > Users**.
7. Right-click the *Users* folder and select **New user**.
8. On the *General* page, enter the SQL user credentials you created in the previous process.
9. On the *Owned schemas* page, select the following schemas:
 - db_datareader
 - db_datawriter
 - db_owner
10. On the *Membership* page, select **db_owner**.
11. Click **OK**.

To finish creating the new database (optional)

 **IMPORTANT**

The following additional steps for creating a new database for the SMART TeamWorks server are general guidance and may not apply to your organization's environment. Only follow these steps if they apply to your organization.

1. Allow both inbound and outbound communication for SQL port 1433 through the firewall on the computer where the new database for the SMART TeamWorks Server is being installed.
2. Confirm that the SQL server's authentication property is set to **SQL server and Windows Authentication mode**. This property is located in the *Security* page of the *Server Properties* window for the SQL server.

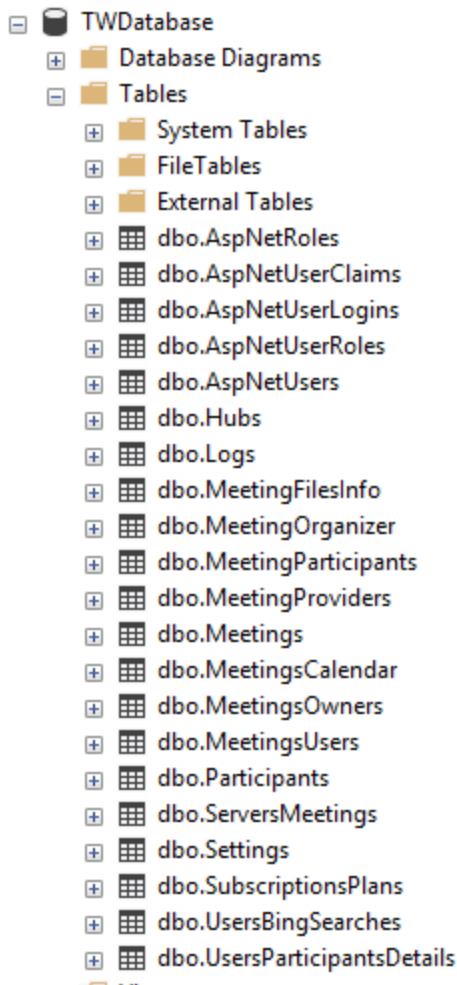
3. Set the TCP port as 1433 for protocols for SQL express, by following these steps:
 - a. Open SQL Server Configuration Manager.
 - b. Expand the *SQL Server's Network Configuration* node, then select **Protocols for SQLEXPRESS**.
 - c. Enable the **TCP/IP** protocol, then double-click it to open its properties.
 - d. Open the IP Addresses tab, and for all the IPs that appear, specify the *TCP Port* as **1433** and leave the *TCP Dynamic Ports* blank.

To populate the SMART TeamWorks Server database

1. From the *SQL Server Management Studio* menu, select **File > New > Query with current connection**.
2. Browse to the SMART TeamWorks installation files you downloaded (see *Downloading the installation files* on page 3) and open the *RMS Database Scripts* folder.
3. Open the latest *create database.sql* script in the *SQL Server Management Studio* query window you opened in the first step.

4. Execute the query.

After the database is created, a list similar to this one appears in the *SQL Server Management Studio*:



Configuring the Web Server

Use the Server Manager to configure the Web Server, installing roles, role services, and features you will need for installing the SMART TeamWorks Server.

To configure the Web Server

1. Open the *Server Manager*.
2. Click **Manage > Add Roles and Features** to open the *Add Roles and Features Wizard*.
3. Add the Web Server (IIS) role.

CHAPTER 2
PREPARING FOR INSTALLATION

4. Enable these .NET Framework 4.6 features:
 - ASP.NET 4.6
 - WCF Services
 - HTTP Activation
 - TCP Port Sharing
5. For the Web Server (IIS) role, enable the following role services and features:
 - Common HTTP Features:
 - Default document
 - Directory Browsing
 - HTTP Errors
 - Static Content
 - Performance
 - Static Content Compression
 - Security
 - Request Filtering
 - Application Development
 - .NET Extensibility 4.6
 - ASP.NET 4.6
 - ISAPI Extensions
 - ISAPI Filters
 - WebSocket Protocol
 - Management Tools
 - IIS Management Console
6. After adding these roles and features, click **Install** and close the *Server Manager*.

Creating a room resource account on the Microsoft Exchange server

Use the Microsoft Office 365 administration center to add a meeting room resource for each meeting room in which you will install SMART TeamWorks Connected edition.

To create a meeting room resource account

1. Open the *Microsoft Office 365 admin center*.
2. Browse to **Resources > Rooms & equipment**.
3. Click **Add** and follow the on-screen instructions to create a meeting room resource account.
4. Record the following details for the new account:
 - Name
 - Email

You will need these details when you configure the SMART TeamWorks Connected edition software.

5. Browse to **Users > Active Users** and select the room you just created.
6. Click **Reset password**.
7. Select **Let me create the password and enter a new password**.
8. Clear the **Make this user change their password when they first sign in** check box.
9. Click **Reset**.
10. If you need to log in to Skype for Business from the meeting room account, activate the related license for the room resource account through the Product licenses option.

The room resource account should have the default lowest access rights level. You don't need to add the account to special groups or assign it a specific role..
11. Repeat steps 1–10 for each meeting room.
12. Open a *PowerShell* console and start a *Microsoft Online Service* session.

13. Execute the following commands in the session:

Function	Command
Show the meeting subject in the SMART TeamWorks calendar	<pre>Set-CalendarProcessing -Identity "Room ID" - AddOrganizerToSubject 0 Set-CalendarProcessing -Identity "Room ID" - DeleteSubject 0</pre> <p>By default, the meeting's subject contains the organizer's name. However, you need to get the actual meeting subject.</p>
Create a meeting room resource list	<pre>New-DistributionGroup -Name "Room List ID" - DisplayName "Room List Friendly Name" - PrimarySmtpAddress roomlist1@domain.com -RoomList</pre>
Add the new meeting room resource account to the list of meeting room resources	<pre>Add-DistributionGroupMember -Identity "Room List ID" -Member "Room ID"</pre>

To execute the above commands, you may need to execute the following commands:

Function	Command
Get a list of all meeting room resources	<pre>Get-Mailbox Where-Object {\$_.RecipientTypeDetails -eq "RoomMailbox"} Format-Table DisplayName,Identity,PrimarySmtpAddress</pre>
Get a list of all meeting room resources lists	<pre>Get-DistributionGroup Where {\$_.RecipientTypeDetails -eq "RoomList"} Format-Table DisplayName,Identity,PrimarySmtpAddress</pre>

Chapter 3

Installing and configuring

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Installing the SMART TeamWorks meeting server

The SMART TeamWorks meeting server manages connectivity between SMART TeamWorks meeting rooms and SMART TeamWorks Contributor apps.

Installing the SMART TeamWorks meeting server involves two main procedures:

1. Create a new site for the meeting server using the *Internet Information Service (IIS) Manager*.
2. Configure the meeting server's web.config file.

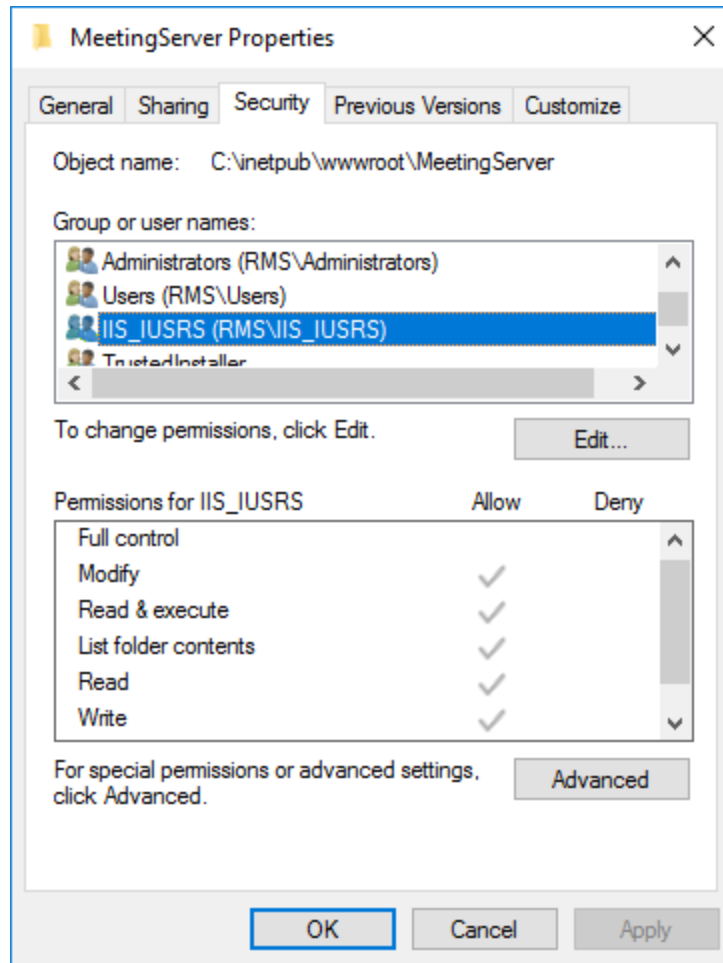
NOTE

To install the meeting server, you will use the *RMS Meeting Server* files you previously downloaded. See *Downloading the installation files* on page 3.

To create a new site for SMART TeamWorks meeting server

1. Open File Explorer and browse to the IIS server's file location. By default, the location is **C:\inetpub\wwwroot**.
2. Create a new folder called **MeetingServer**.
3. Copy the files from the *RMS Meeting Server* folder to the **MeetingServer** folder you created in the previous step.
4. Right-click the **MeetingServer** folder and select **Properties**.
5. On the *Security* tab, select **IIS_IUSRS** under *Group or user names* and click **Edit**.

6. Modify the permissions to give **IIS_IUSRS** Modify and Write permissions.

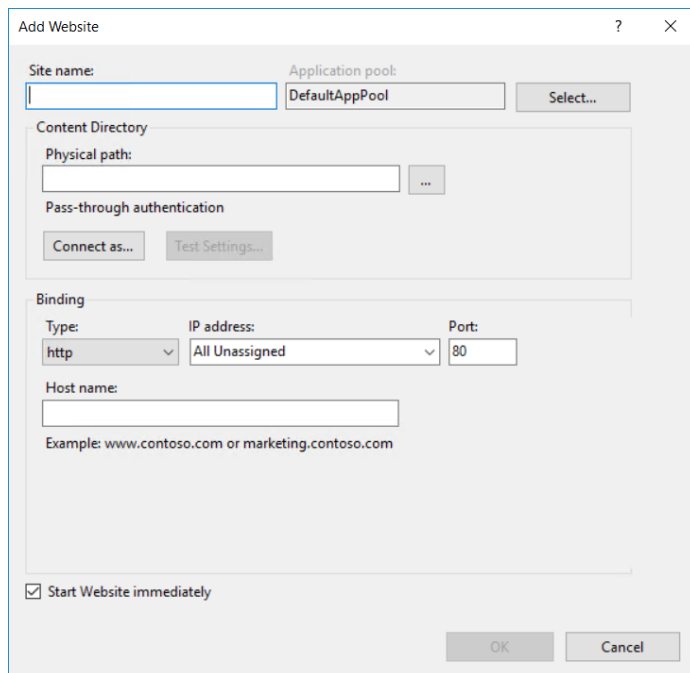


! IMPORTANT

Confirm that these permission settings are propagated to sub-folders and files.

7. Click **OK** to close the *MeetingServer Properties* dialog box.

- Open *Internet Information Service (IIS) Manager*, right-click the *Sites* folder, and select **Add website**.



- Make the following changes:

Field	Setting
Site name	Enter MeetingServer .
Physical path	Enter the path to the <i>MeetingServer</i> folder you created: C:\inetpub\wwwroot\MeetingServer

- In the *Binding* section, assign a dedicated IP address for the site, then use the following security settings:

Setting	Option 1 (recommended)	Option 2
Type	https	http
Port	443	80

NOTE

The recommended settings in Option 1 provide better security, but they are only available if at least one SSL certificate is installed on the Web Server IIS. If you do not have an SSL certificate, use the less secure Option 2 settings.

11. Enter a **Host name** in the format of meetings.companyname.com. For example, meetings.smartteamworks.com. This is your meeting server's URL.

You will need this address later when you configure the web portal for the SMART TeamWorks Server.

NOTE

This name should resolve within the local network or from internet, based on your choice and configuration.

12. Click **OK** to add the site and return to the main *Internet Information Service (IIS) Manager* window.
13. Confirm that the Application pool for the MeetingServer site has the following settings:

Field	Setting
Name	Enter MeetingServer .
.NET CLR version	.NET CLR Version 4.0.xxxxx
Managed pipeline mode	Integrated

After you finish adding the MeetingServer site, configure the web.config file.

To configure the Web.config file for the SMART TeamWorks meeting server

1. Open File Explorer and browse to the **MeetingServer** folder you created: (C:\inetpub\wwwroot\MeetingServer).
2. Use an online service to generate a unique machine key for your installation, such as AllKeysGenerator (allkeysgenerator.com/Random/ASP-Net-MachineKey-Generator.aspx).

 **IMPORTANT**

You need a machine key generated for ASP.Net 4.5 framework.

3. Copy the machine key and save it to your computer. You need this key for configuring the SMART TeamWorks meeting server and the SMART TeamWorks web portal.

4. Open the *Web.config* file in a text editor and find the `<system.web>` section. Configure the following settings:

a. `httpRuntime maxLength="307200"`

Where `maxLength = 307200` (default)

This sets the maximum file size (in bytes) users can upload in SMART TeamWorks. Set this accordingly with the value you set in the `maxAllowedContentLength` parameter (see step 5).

b. `httpRuntime executionTimeout="900"`

Where `executionTimeout = 900` (default)

This sets the timeout (in seconds) for HTTP requests.

c. `<globalization uiCulture="en-US" culture="en-US"`

Where both instances of "en-US" are replaced with your organization's culture.

d. `machineKey
validationKey="2D32F2D5D2D569938C8E99B4D4DC263A80F7842CBE2D2F1638323D6808
1BE795542A2472A5D15054A22267EC59941BDDE50386818C9103B02121BB8E60B5E312"de
ryptionKey="A47E22BC79E0808F9B6959F6A4DCFAAFD48627473C8DADA46856DA2767E5
FF05" validation="SHA1" decryption="AES"`

Where `machineKey validationKey` = the unique machine key you generated in step 2.

5. Find the `<system.webServer>` section and the `<requestFiltering>` sub-item and configure the following settings:

`requestLimits maxAllowedContentLength="314572800"`

Where `maxAllowedContentLength = 314572800` (default)

This sets the maximum file size (in bytes) users are allowed to upload in SMART TeamWorks. Set this accordingly with the value set in the `maxLength` parameter (see step 4).

6. Find the <connectionStrings> section and configure the following settings:

```
<add name="RMSEntities"  
"metadata=res://*/Entities.RMSModel.csdl|res://*/Entities.RMSModel.ssdl|res://  
*/Entities.RMSModel.msl;provider=System.Data.SqlClient;provider connection  
string=&quot;data source=YOUR_SQL_SERVER;initial catalog=YOUR_RMS_  
DATABASE;user id=YOUR_DB_USERNAME;password=YOUR_DB_  
USERPWD;multipleactiveresultsets=True;application name=EntityFramework&quot;;"
```

Where:

- YOUR_SQL_SERVER is the host name or IP address of your SQL Server.
 - YOUR_RMS_DATABASE is the name of your SMART TeamWorks database. For example, TWDDatabase. See *RMS Database installation* on page 4.
 - YOUR_DB_USERNAME is the user name for the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.
 - YOUR_DB_USERPWD is the password of the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.
7. Save the file.
 8. From the *Internet Information Service (IIS) Manager*, restart the MeetingServer site.
 9. Test the new SMART TeamWorks meeting server by opening a browser and entering the IP address or the URL for the server. You should see a page something like this one:



Installing the web portal for SMART TeamWorks Server

The web portal for SMART TeamWorks Server is a management tool administrators can use to manage user accounts, meeting data, and meeting room accounts. Users can manage their own accounts through the portal as well, provided your organization supports the creation of personal user accounts. Personal accounts allow users to host their own whiteboard sessions through their SMART TeamWorks Contributor apps.

Much like the process for installing the SMART TeamWorks meeting server, installing the web portal for SMART TeamWorks Server involves two main procedures:

1. Create a new site for the web portal using the *Internet Information Service (IIS) Manager*.
2. Configure the web portal's web.config file.

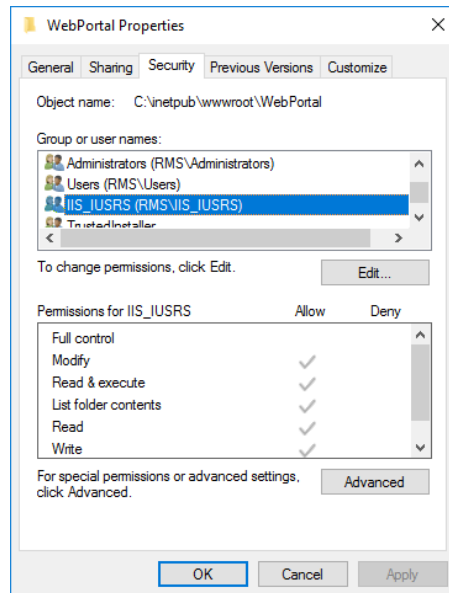
NOTE

To install the web portal, you will use the *RMS Web Portal for IIS* files you previously downloaded. See *Downloading the installation files* on page 3.

To install the web portal

1. Open File Explorer and browse to the IIS server's file location. By default, the location is **C:\inetpub\wwwroot**.
2. Create a new folder called **WebPortal**.
3. Copy the files from the *RMS Web Portal for IIS* folder to the **WebPortal** folder you created in the previous step.
4. Right-click the **WebPortal** folder and select **Properties**.
5. On the *Security* tab, select **IIS_IUSRS** under *Group or user names*, and click **Edit**.

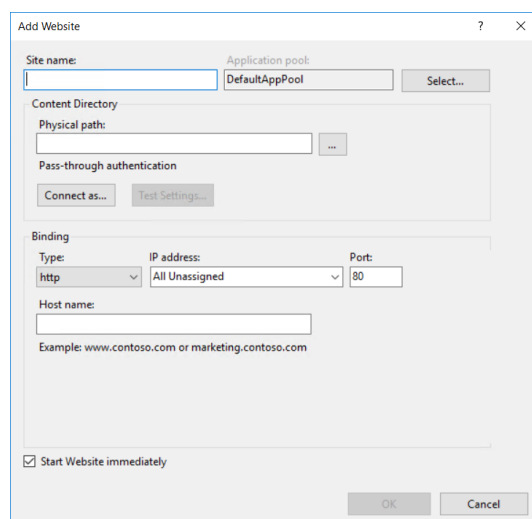
6. Modify the permissions to give **IIS_IUSRS** Modify and Write permissions.



! IMPORTANT

Confirm that these permission settings are propagated to sub-folders and files.

7. Click **OK** to close the *WebPortal Properties* dialog box.
8. Open *Internet Information Service (IIS) Manager*, right-click the *Sites* folder, and select **Add website**.



9. Make the following changes:

Field	Setting
Site name	Enter WebPortal .
Physical path	Enter the path to the <i>WebPortal</i> folder you created: C:\inetpub\wwwroot\WebPortal

10. In the *Binding* section, assign a dedicated IP address for the site, then use the following security settings:

Setting	Option 1 (recommended)	Option 2
Type	https	http
Port	443	80

NOTE

The recommended settings in Option 1 provide better security, but they are only available if at least one SSL certificate is installed on the Web Server IIS. If you do not have an SSL certificate, use the less secure Option 2 settings.

11. Enter a **Host name** in the format of `webportal.companyname.com`. For example, `webportal.smartteamworks.com`. This is your web portal's URL.

NOTE

This name should be resolvable within the local network or from the internet, based on your choice and configuration.

12. Click **OK** to add the site and return to the main *Internet Information Service (IIS) Manager* window.
13. Confirm that the application pool for the WebPortal site has the following settings:

Field	Setting
Name	Enter WebPortal .
.NET CLR version	.NET CLR Version 4.0.xxxxx
Managed pipeline mode	Integrated

After you finish adding the MeetingServer site, configure the `web.config` file.

To configure the Web.config file for the SMART TeamWorks web portal

1. Open File Explorer and browse to the **WebPortal** folder you created:
(C:\inetpub\wwwroot\WebPortal).
2. Open the *Web.config* file in a text editor and find the <system.web> section. Configure the following settings:

a. `globalization uiCulture="en-US" culture="en-US"`

Where both instances of "en-US" are replaced with your organization's culture.

b. `machineKeyvalidationKey="2D32F2D5D2D569938C8E99B4D4DC263A80F7842CBE2D2F16
38323D68081BE795542A2472A5D15054A22267EC59941BDDE50386818C9103B02121BB8E6
0B5E312"decryptionKey="A47E22BC79E0808F9B6959F6A4DCFAAFD48627473C8DADA468
56DA2767E5FF05" validation="SHA1" decryption="AES"`

Where `machineKeyvalidationKey` = the same unique machine key you entered when configuring the Web.config file for the SMART TeamWorks meeting server. See page 14.

3. Find the <connectionStrings> section and configure the following settings:

- a. `add name="IdentityDbContext" connectionString="Server=YOUR_SQL_SERVER;Database=YOUR_RMS_DATABASE;User Id=YOUR_DB_USERNAME;Password=YOUR_DB_USERPWD;MultipleActiveResultSets=True;"`

Where...

- YOUR_SQL_SERVER is the host name or IP address of your SQL Server.
- YOUR_RMS_DATABASE is the name of your SMART TeamWorks database. For example, TWDatabase. See *RMS Database installation* on page 4.
- YOUR_DB_USERNAME is the user name for the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.
- YOUR_DB_USERPWD is the password of the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.

- b. `add name="RMSEntities"
"metadata=res://*/Entities.RMSModel.csdl|res://*/Entities.RMSModel.ssdl|res://*/Entities.RMSModel.msl;provider=System.Data.SqlClient;provider connection string="data source=YOUR_SQL_SERVER;initial catalog=YOUR_RMS_DATABASE;user id=YOUR_DB_USERNAME;password=YOUR_DB_USERPWD;multipleactiveresultsets=True;application name=EntityFramework";"`

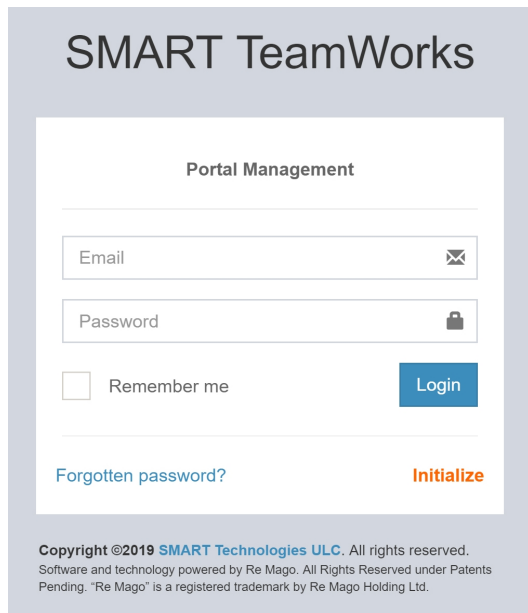
Where...

- YOUR_SQL_SERVER is the host name or IP address of your SQL Server.
- YOUR_RMS_DATABASE is the name of your SMART TeamWorks database. For example, TWDatabase. See *RMS Database installation* on page 4.
- YOUR_DB_USERNAME is the user name for the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.
- YOUR_DB_USERPWD is the password of the user you created to access the SMART TeamWorks database. See *To create a new user with SQL authentication* on page 4.

4. Save the file.

5. From the *Internet Information Service (IIS) Manager*, restart the WebPortal site.

6. Test the new web portal by opening a browser and entering the web portal's IP address or URL (for example, webportal.smartteamworks.com). You should see a page something like this one:



The screenshot shows the SMART TeamWorks Portal Management login interface. At the top, the text "SMART TeamWorks" is displayed in a large, bold, sans-serif font. Below this, the heading "Portal Management" is centered. The main content area contains a login form with the following elements: an "Email" input field with an envelope icon, a "Password" input field with a lock icon, a "Remember me" checkbox, and a blue "Login" button. Below the form, there are two links: "Forgotten password?" in blue and "Initialize" in orange. At the bottom of the page, there is a copyright notice: "Copyright ©2019 SMART Technologies ULC. All rights reserved. Software and technology powered by Re Mago. All Rights Reserved under Patents Pending. 'Re Mago' is a registered trademark by Re Mago Holding Ltd."

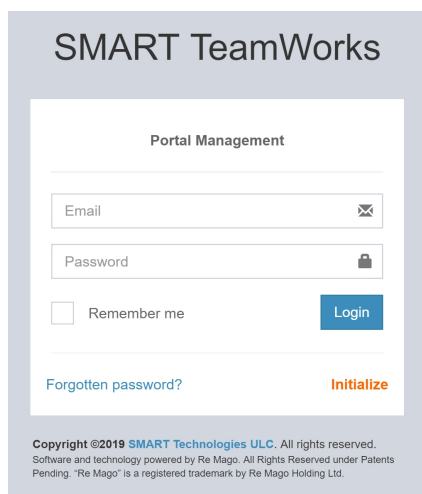
Initializing the SMART TeamWorks Server database

Use your newly created web portal for SMART TeamWorks Server to initialize the server's database. Initializing the database also creates the default Super Administrator account, which you use to sign in to the web portal for the first time.

To initialize the SMART TeamWorks database

1. Open a browser and enter the address for the web portal you created (for example, <https://webportal.smartteamworks.com>).

The *RMS IT Portal* sign in page that opens includes an *Initialize* link in the bottom-right corner.



OR

Run initialization manually by opening a browser and entering the address for your web portal with `/Account/Initialize` attached to the end of the URL. For example, <https://webportal.smartteamworks.com/Account/Initialize>.

2. Click the *Initialize* link to populate the database and automatically create a default Super Administrator account for the web portal.

After initialization is complete, you are redirected to the web portal's sign in page.

NOTE

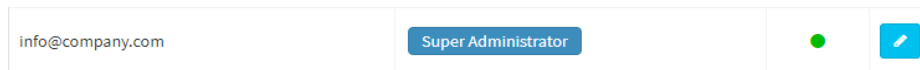
Initialization can only be completed once. Running the initialization manually a second time has no effect.


To sign in to the web portal for the first time

1. In a browser, go to your web portal website (for example, <https://webportal.smartteamworks.com>).
2. During initialization, a default Super Administrator account was created for the web portal with the following credentials:
 - User name = `info@company.com`
 - Password = `Admin@01`

Sign in to the web portal using these default credentials.

3. From the web portal's navigation menu, click **Users > Users list** to view the list of users. Because this is the first time you're signing in to the web portal, you should see only the default Super Administrator account:



4. Click  to edit the default Super Administrator account.
5. Change the email address and password to create your web portal's unique Super Administrator account, then click **Save data**.

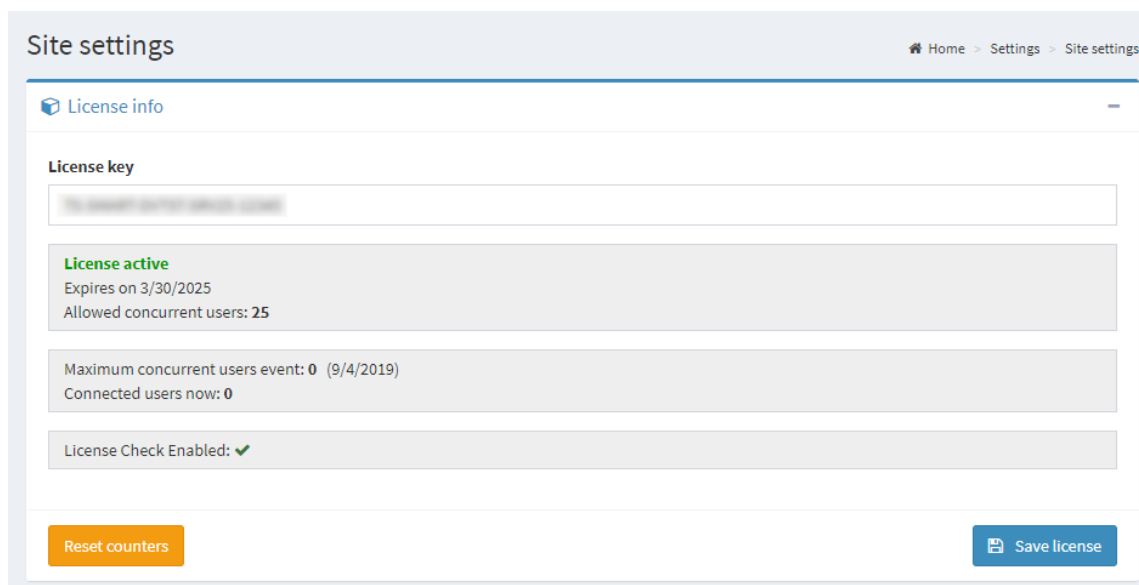
Next, make user accounts for your organization's IT Administrators, meeting rooms, and users.

Configuring the web portal and activating the SMART TeamWorks Server license

After you initialize the database, you need to connect the SMART TeamWorks meeting server to the web portal and activate your organization's license for SMART TeamWorks Server. You'll also need to enter settings for the meeting server and other global settings.

To activate the SMART TeamWorks Server license

1. In a browser, go to your web portal (for example, <https://webportal.smartteamworks.com>).
2. Sign in using the Super Administrator credentials you created.
3. From the web portal's navigation menu, click **Settings** to open the *Site settings* page.



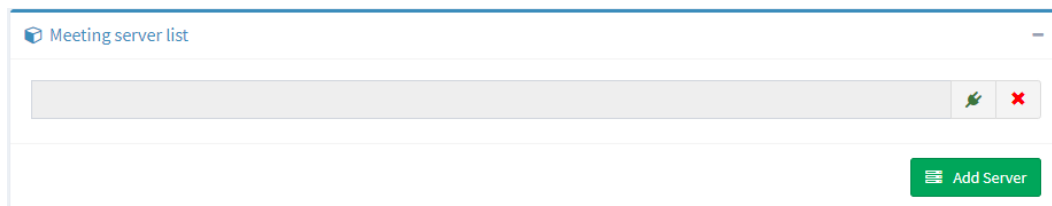
4. Expand the *License info* section. In the *License key* field, enter your organization's license key for SMART TeamWorks Server.
5. Click **Save License**.

NOTE

If you see the error message “Unable to contact on license server” make sure that server can access the Re Mago license server (*remago.com) on port 443. Also confirm that the firewall, antivirus, and proxy settings do not block this communication.

To add the Meeting Server URL for SMART TeamWorks Server

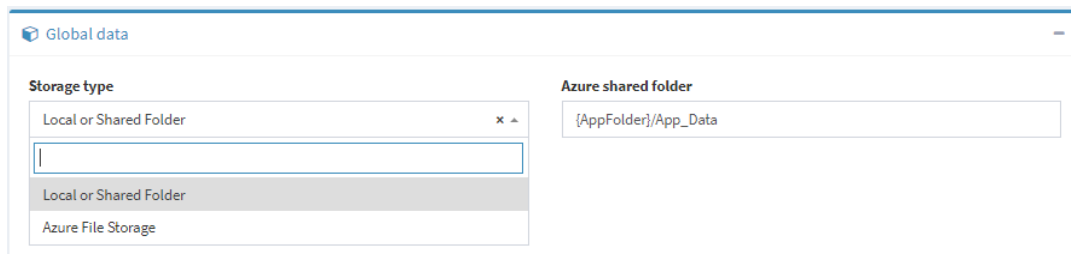
1. From the web portal's navigation menu, click **Settings** to open the *Site settings* page.
2. Expand the *Meeting server list* section and click **Add Server**.



3. Enter the URL for the SMART TeamWorks meeting server site you created and click **Add Server**. See *You will need this address later when you configure the web portal for the SMART TeamWorks Server*, on page 14.

To select a storage type for SMART TeamWorks

1. From the web portal's navigation menu, click **Settings** to open the *Site settings* page.
2. Expand the *Global Data* section.
3. Select the *Storage Type* your organization is using for SMART TeamWorks Server.



Complete the storage settings setup using the procedure that applies to your selected storage type.

To configure storage settings with Azure File Storage

1. In the *Azure shared folder* field, enter the following settings:

Field	Description
Azure shared folder	Enter the name of the root folder in the <i>Files</i> page of the storage account created for the SMART TeamWorks Server in your organization's Azure Portal. If a folder doesn't already exist, create one.
Azure storage connection string	Enter the connection string located in the <i>Access keys</i> page of the storage account created for the SMART TeamWorks Server in your organization's Azure Portal.

 **IMPORTANT**

Before entering these settings, you must have a storage account resource type created for the SMART TeamWorks Server in your organization's Azure Portal.

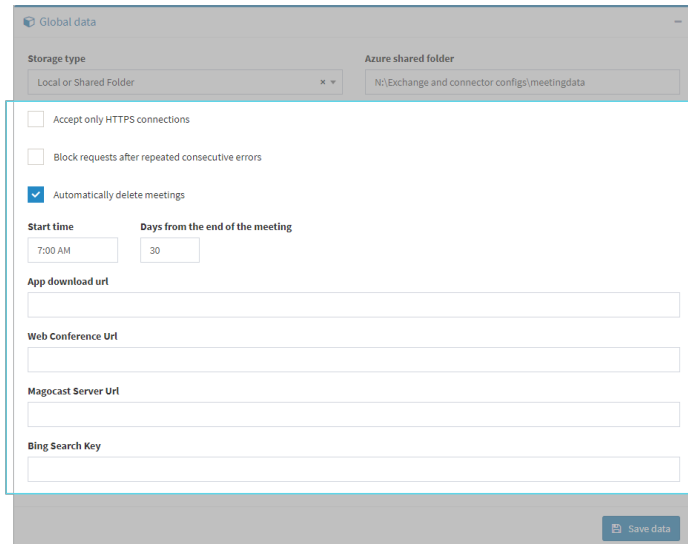
2. Click **Save data**.

To configure storage settings with a Local or Shared Folder

1. If you chose **Local or Shared Folder** as the storage type, create a folder for storing SMART TeamWorks meeting data files. This folder should be on the same virtual machine server or computer where SMART TeamWorks Server was installed.
2. In the *Azure shared folder* field, enter the pathway for the folder you created in step 1.
3. Click **Save data**.

To complete global settings for SMART TeamWorks Server

1. From the web portal’s navigation menu, click **Settings** to open the *Site settings* page.
2. Expand the *Global Data* section.



3. Select the following options to suit your needs:

Option	Description
Accept only HTTPS connections	Select this option to enable only HTTPS connections for connecting to whiteboard sessions.
Block requests after repeated consecutive errors	Select this option to block multiple failed sign in attempts that originate from a potential attacker. SMART recommends selecting this option for security purposes.
Automatically delete meetings	Select this option if you want meeting data to be removed after a set time. NOTE Choosing this option does not delete data for recurring meetings.
Start time	If you've enabled <i>Automatically delete meetings</i> , enter the start time.
Days from the end of the meeting	If you've enabled <i>Automatically delete meetings</i> , enter the time period (in days) after which the meeting data will be deleted.

4. (Optional) In the *App download url* field, enter **https://support.smarttech.com/downloads/teamworks**.

This redirects meeting participants to the SMART TeamWorks apps download page if they click the join session link in the meeting invitation but do not yet have the SMART TeamWorks app installed on their device.

5. In the *Web Conference Url* field, enter the URL for your organization's web conference application.
6. Leave the *Magocast Server Url* field blank. This feature is not yet supported.
7. If your organization has a Bing search key, enter your organization's key in the *Bing Search Key* field. This enables the web search feature in the SMART TeamWorks whiteboard's File Manager.
8. Click **Save data**.

Creating accounts in the web portal

After logging in to the web portal for the first time, create the accounts for meeting rooms and for managing the web portal.

NOTE

You must be logged in as a Super Administrator or IT Administrator to create accounts.

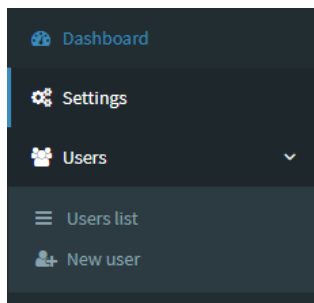
The following account types are available in the web portal for SMART TeamWorks Server:

Account type	Description
Super Administrator	<p>Used during the initial installation and configuration of SMART TeamWorks Server and to manage the meeting data stored in the web portal. It can also recover other accounts for the web portal if passwords have been lost or need to be reset.</p> <p>A Super Administrator account is created by default when you initialize the SMART TeamWorks Server database (see page 22).</p> <p>There should only be one Super Administrator account. However, you can create a second, back-up Super Administrator account to be used for recovering access to the web portal if the other Super Administrator account is locked out.</p>
Settings Manager	<p>This account type can manage the web portal's settings. This account type can access only the <i>Settings</i> menu in the web portal.</p>

Account type	Description
Subscriptions Manager	This account type can manage subscriptions. This role is not applicable for this version of SMART TeamWorks Server. Do not use.
Users Manager	This account type can add and manage web portal users. This account type can access only the <i>Users</i> menu in the web portal.
Logs Manager	This account type can view log data for the SMART TeamWorks Server. This account type can access only the <i>System logs</i> menu in the web portal.
Api Documents Manager	This account type can access the <i>RMS WepPortal Api</i> page. This role is not applicable for this version of SMART TeamWorks Server. Do not use.
My Meetings Manager	Used for meeting rooms and user accounts for employees. This account type can manage its own meeting data. This account type can access only the <i>Meetings</i> menu in the web portal. Create a My Meetings Manager account for each meeting room and for each employee who would like to use the SMART TeamWorks Contributor app to host a virtual meeting.

To create a new account

1. Sign in to your organization's web portal for SMART TeamWorks Server.
2. From the web portal's navigation menu, click **Users > New user**.



3. Enter the email address and a password for the account:

For...	Use...
Super Administrator, Settings Manager, Logs Manager, and Users Manager accounts	<ul style="list-style-type: none">○ The IT Administrator's company email.○ A custom password
My Meeting Manager account (for meeting rooms)	<ul style="list-style-type: none">○ The email for the meeting room resource created on Exchange○ A custom password This password is used when configuring SMART TeamWorks Connected edition on the meeting room's computer.
My Meeting Manager account (for Employee accounts)	<ul style="list-style-type: none">○ The employee's company email○ A custom password (not the employee's Exchange password) Employees use this password in their SMART TeamWorks Contributor app.

4. Leave the *Account expiration* field blank. This feature is not yet supported.
5. From the *RolesID* drop-down, select the role for the account.
6. From the *Subscription* drop-down, select **Unlimited**.
7. Select the *Confirmed* check box if it's not already selected.
8. Click **Save data**.

Chapter 4

Connecting meeting room accounts with the Exchange server

Installing the RMS Connectors Configurator and RMS Connector for Exchange	32
Creating meeting room configuration files	32
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Synchronizing SMART TeamWorks calendars with Exchange	43
Create a task to clean temporary files	46

After you create meeting room accounts in the web portal for SMART TeamWorks server, they need to be connected to their corresponding room resource accounts in your organization's Microsoft Exchange.

NOTE

This procedure is not required for user accounts that you created in the web portal for SMART TeamWorks server for employees or virtual meeting rooms.

Use the *RMS Connectors Configurator* application to create meeting room configuration files. These meeting room configuration files are used *RMS Connector for Exchange* to connect the meeting room accounts from the web portal for SMART TeamWorks server with the meeting room accounts on your organization's Exchange server. After creating the meeting room configuration files and running the *RMS Connector for Exchange*, you must set up a few system tasks to finish connecting the meeting room accounts on the web portal with your organization's Exchange server.

NOTE

Both the *RMS Connectors Configurator* and *RMS Connector for Exchange* are included with the SMART TeamWorks Server installation files. See *Downloading the installation files* on page 3.

Installing the RMS Connectors Configurator and RMS Connector for Exchange

Install the *RMS Connectors Configurator* and *RMS Connector for Exchange* tools on a drive or server location of your choice. This location should have access to:

- the Microsoft Exchange server
- the RMS Meeting Server website
- the SMART TeamWorks server's web portal website
- an SMTP server with open relay

Additionally, because this location will be used to store meeting data, it should have enough storage space to accommodate the meeting data.

NOTE

This meeting data storage is temporary. You will set up a task to schedule a regular cleanup of this location, as described in *Create a task to clean temporary files* on page 46.

To install the RMS Connectors Configurator and RMS Connector for Exchange


1. Open the SMART TeamWorks Server installation files you downloaded.
2. In your chosen drive or server location, create a new folder called "*RMS Connector and Configurator*"
3. Copy the *RMS Connectors Configurator* and *RMS Connector for Exchange* folders to the *RMS Connector and Configurator* folder you created in the previous step.

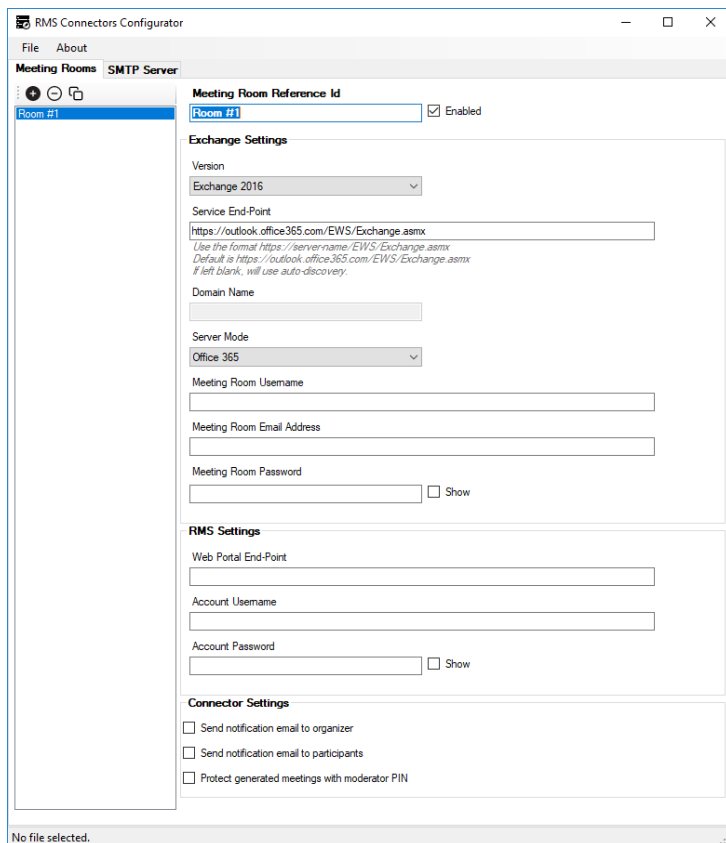
Creating meeting room configuration files

Before you can create a configuration file for a meeting room, you must create an account for the meeting room in the web portal (see page 28). The meeting room resource must also have an account on your organization's Exchange server (see page 9).

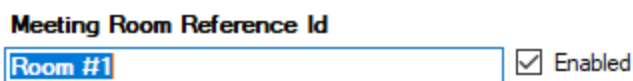
Create a single configuration file to manage as many meeting rooms as you need. Using the *RMS Connectors Configurator*, add a meeting room entry for each meeting room account you created in the web portal. After you've added meeting rooms, add your organization's SMTP server settings. This enables the *RMS Connectors Configurator* to send meeting notification emails to the meeting organizer and participants.

To create a new configuration file for meeting rooms

1. In File explorer, browse to the *RMS Connector and Configurator* folder you created (see page 32) and open the *RMS Connectors Configurator* folder.
2. Run the **RMS Connectors Configurator.exe**.
3. When the *RMS Connectors Configurator* opens, click the *Meeting Rooms* tab.
4. Click **Add**  to add a new meeting room.



5. Enter a **Meeting Room Reference Id** to help you easily identify the meeting room and manage it in the future.



6. Select the **Enabled** check box. If this check box is not selected, the meeting room will be ignored when you run the *RMS Connector for Exchange*.

7. In the *Exchange Settings* section, enter the meeting room's Microsoft Exchange credentials:

Exchange Settings

Version

Service End-Point

Use the format https://server-name/EWS/Exchange.asmx
 Default is https://outlook.office365.com/EWS/Exchange.asmx
 If left blank, will use auto-discovery.

Domain Name

Server Mode

Meeting Room Username

Meeting Room Email Address

Meeting Room Password
 Show

Setting	Description
Version	Select the version of Exchange that your organization uses. For example, Exchange 2016.
Service End-Point	Enter the service URL for the email server. If you don't know your organization's URL, use the default URL: https://outlook.office365.com/EWS/Exchange.asmx
Domain Name	If applicable, enter the domain name from your organization's SMTP settings.
Server Mode	Select either Office 365 or On-premise/Hybrid , depending on what your organization uses.
Meeting Room Username	The meeting room user name refers to the User Principal Name (UPN) for the meeting room's user account. If the UPN is the same as the meeting room's email, leave this field blank. If the UPN and the meeting room's email are different, enter the UPN here.
Meeting Room Email Address	Enter the email address assigned for the room.
Meeting Room Password	Enter the password for the account created for the room.

 **CAUTION**

The *RMS Connectors Configurator* does not check for configuration coherence between meeting room configuration files that you add in this application. In other words, when you add a meeting room, make sure all the Exchange credentials entered for the meeting room are unique to that meeting room to avoid errors.

8. In the *RMS Settings* section, enter the meeting room's account credentials you assigned in the web portal for SMART TeamWorks Server:

RMS Settings

Web Portal End-Point

Account Username

Account Password
 Show

Setting	Description
Web Portal End-Point	Enter the URL address you defined for the web portal (for example, https://webportal.smartteamworks.com). See <i>Enter a Host name in the format of webportal.companyname.com</i> . For example, <i>webportal.smartteamworks.com</i> . This is your web portal's URL. on page 19.
Account Username	Enter the email address assigned for the meeting room account in the web portal.
Meeting Room Password	Enter the password for the account created for the meeting room account in the web portal.

9. (Optional) In the *Connector Settings* section, select the options for the meeting notifications sent when the meeting room is booked:

Connector Settings

Send notification email to organizer




Send notification email to participants

Protect generated meetings with moderator PIN

Setting	Description
Send notification email to organizer	The organizer receives an email from the server that provides details, such as meeting ID and the organizer and participant's PINs, needed for starting a SMART TeamWorks whiteboard session.
Send notification email to participants	The participants receive an email that provides details, such as meeting ID and the participant's PIN, needed for starting a SMART TeamWorks whiteboard session.
Protect generated meetings with moderator PIN	<p>Protects the room's meetings with a PIN.</p> <hr/> <p>! IMPORTANT</p> <p>If you protect meetings with a PIN, SMART recommends that you also enable notification emails to at least the meeting organizer. Otherwise, they will not know the PIN they need to enter to join the whiteboard session.</p>

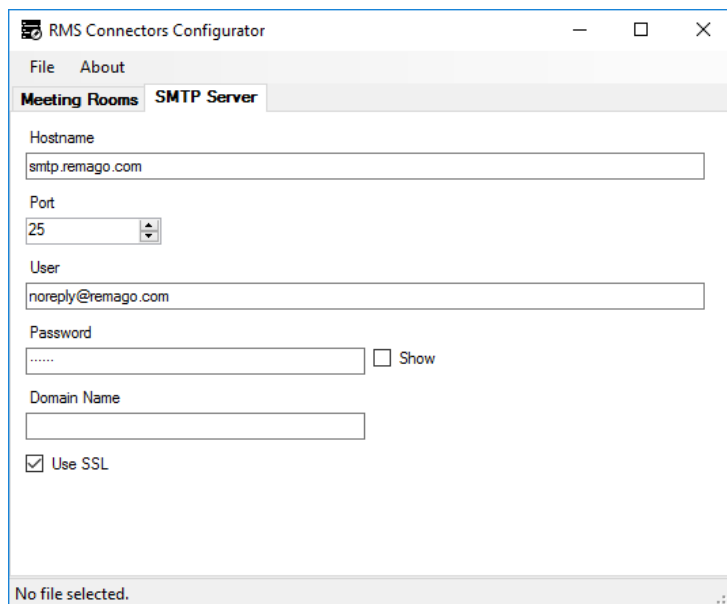
10. Repeat steps 1-9 for each meeting room account you created in the web portal for SMART TeamWorks Server.

TIPS

- You can create another meeting room entry by using **Copy** . Select an existing meeting room entry and click . This creates a new meeting room with the exact same settings, and you can adjust the relevant fields to create a unique meeting room entry.
- To remove a meeting room entry, select it and click **Remove** . Deleting an entry cannot be undone.

To add SMTP server settings

1. From the *RMS Connectors Configurator*, click the *SMTP Server* tab.



2. Enter the following settings:

Setting	Description
Hostname	Enter the SMTP server name from your organization.
Port	Enter the port for your organization's SMTP server.
User	Enter the service user account for your organization's SMTP server.
Password	Enter the Exchange password for the email you entered in Default email sender field.
Domain name	If applicable, enter the domain name from your organization's SMTP settings.
Use SSL	Select this option if your organization uses SSL.

To save the configuration file

1. From the *RMS Connectors Configurator*, click **File > Save**.
2. In the *Save* dialog box, browse to the *RMS Connector and Configurator* folder and open the *RMS Connector for Exchange* folder (see *Installing the RMS Connectors Configurator and RMS Connector for Exchange* on page 32), then select the *config* folder.

3. Click **Save**. The file is saved in binary format with its content encrypted.

NOTE

If a file with the same name already exists, the existing file is renamed with a .bak extension. This creates a backup of previous settings that you can use to restore settings if needed.

Using the RMS Connector for Exchange

Use the *RMS Connector for Exchange* to connect meeting room accounts you create in the web portal for SMART TeamWorks server with the meeting rooms' Exchange accounts.

To configure the RMS connector for Exchange

1. In File explorer, browse to the *RMS Connector and Configurator* folder you created (see page 32) and open the *RMS Connector for Exchange* folder.
2. Right-click the *RMS Connector for Exchange.exe.config* file and open it with a text editor, such as Notepad.
3. Locate the `<appSettings>` section and edit the values for the following parameters:

```
<add key="RmsConnectorConfigurationFile" value="config\Connector.rms" />
<add key="EmailSenderName" value="SMART TeamWorks" />
<add key="EmailSenderAddress" value="noreply@remago.com" />
<add key="EmailTemplatesFolder" value="templates" />
```

Parameter	Default value	Description
RmsConnectorConfigurationFile	config\Connector.rms	<p>Enter the path to the RMS connector configuration file you saved in the previous procedure (see <i>Creating meeting room configuration files</i> on page 32). This file should be saved in the <i>RMS Connector for Exchange</i> folder you saved earlier (see <i>Installing the RMS Connectors Configurator and RMS Connector for Exchange</i> on page 32).</p> <hr/> <p>NOTE</p> <p>The path can be in relative or full format.</p> <hr/>
EmailSenderName	SMART TeamWorks	<p>If you chose to send email notifications to the meeting organizer and participants in the <i>RMS Connectors Configurator</i>, enter a name that will appear as the sender for the meeting notifications.</p>
EmailSenderAddress	noreply@remago.com	<p>If you chose to send email notifications to the meeting organizer and participants in the <i>RMS Connectors Configurator</i>, enter a name that will appear as the sender's email address for the meeting notifications.</p>

Parameter	Default value	Description
EmailTemplatesFolder	templates	<p>If you chose to send email notifications to the meeting organizer and participants in the <i>RMS Connectors Configurator</i>, enter the path top the templates folder in the <i>RMS Connector for Exchange</i> folder.</p> <hr/> <p>TIP</p> <p>You can customize these templates to suit your organization's needs. See <i>Appendix A: Customize notification email templates</i> on page 58.</p>

- (Optional) If your organization uses a vanity URL for one of SMART TeamWorks' supported web conferencing applications, locate the `<AvGroupConfigs>` section.

This section has a list of customizable values and parameters for each web-conferencing application supported by SMART TeamWorks and appears in the following format:

```
<add type="[type]" mode="[mode type]" value="[URL]" />
```

Where:

[type]	<p>Is one of the following:</p> <ul style="list-style-type: none"> ◦ Cisco WebEx ◦ Google Meet ◦ GoToMeeting ◦ InFocus ConX ◦ Join Me ◦ Lifesize ◦ Microsoft Teams ◦ Smart Shell ◦ Skype for Business ◦ Zoom 	<p>Do not change this value.</p> <p>This value determines which icon is shown in the SMART TeamWorks launcher's calendar.</p>
---------------	--	---

[mode type] Is one of the following:

- contains
- endwith
- regex

The **[mode type]** links the web conference application defined in **[type]** with the web conference link that appears in the body of the Exchange meeting invitation that matches the value defined in the **[URL]**.

Use the **[mode type]** appropriate for your organization's custom URL. There are three options:

- **contains** = Use this mode type to link the first web conference link containing the URL value defined for **[type]**.

EXAMPLE

If the value="*[URL]*" is defined as value="**[abcsite.teams.microsoft]**" the following web conference links would match:

- <https://www.abcsite.teams.microsoft.com>
- <https://abcsite.teams.microsoft.com>

- **endwith** = Use this mode type to link the first web conference link that ends with the URL value defined in **[type]**.

EXAMPLE

If the value="*[URL]*" is defined as value="**[abcsite.teams.microsoft.com]**" the following web conference links would match:

- <https://www.abcsite.teams.microsoft.com>
- <https://abcsite.teams.microsoft.com>

But the following would not:

- <https://www.abcsite.teams.microsoft.ca>

		<ul style="list-style-type: none"> ◦ regex= Use this mode type when trying to match the vanity URL using regular expressions or boolean characters. This links the first web conference containing the URL value defined in [type] anywhere in the web conference link. <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>EXAMPLE</p> <p>If the value="<i>[URL]</i>" is defined as value="join?[a-z0-9]+.abc-company.net" then it would link the first web conference link starting with join, followed by any combination of numbers and letters, then followed by .abc-company.net. in this example, the following web conference links would match:</p> <ul style="list-style-type: none"> ◦ https://join.abc-company.net ◦ https://jointoday.abc-company.net </div>
[URL]	Placeholder URL	<p>These URLs may be changed to the vanity URL used by your organization.</p> <hr/> <p>NOTE</p> <p>Standard URL formats are not impacted by these changes.</p>

Locate the web conferencing application used by your organization and edit its `value=" [URL]"` parameter with the vanity URL used by your organization and the `mode=" [mode type]"` with the appropriate value.

For example, ABC company uses Microsoft Teams and has a vanity URL of **teams.microsoft.abc-company.com**. In this example, you would make the following changes:

```
<add type="Microsoft Teams" mode="contains" value="teams.microsoft.com" />
```

Changes to:

```
<add type="Microsoft Teams" mode="contains" value="teams.microsoft.abc-company.com" />
```

5. (Optional) If your company uses a web conferencing application that is not one of the supported applications, you can edit the following line of code in the `<AvGroupConfigs>` section to configure it to work with SMART TeamWorks:

```
<add type="Other" mode="contains" value="join.others.me" />
```

Where:

- `add type="Other"`: Do not change this value. This will make a generic icon appear in the SMART TeamWorks launcher's calendar.
 - `mode="contains"`: Change to either `contains`, `endwith`, or `regex` depending on your needs.
 - `value="join.others.me"`: Enter the URL for the web conferencing application.
6. Save the changes you made to the *RMS Connector for Exchange.exe.config* file.
 7. Test the configuration of the *RMS Connector for Exchange* by opening a command window and running the following command: **RMS Connector for Exchange.exe**.

You should see an output confirming a successful test.

NOTE

This creates a new *logs* folder which will contain log files. You can customize the level of logging that occurs to optimize performance. See *Appendix B: Log optimizations* on page 62.

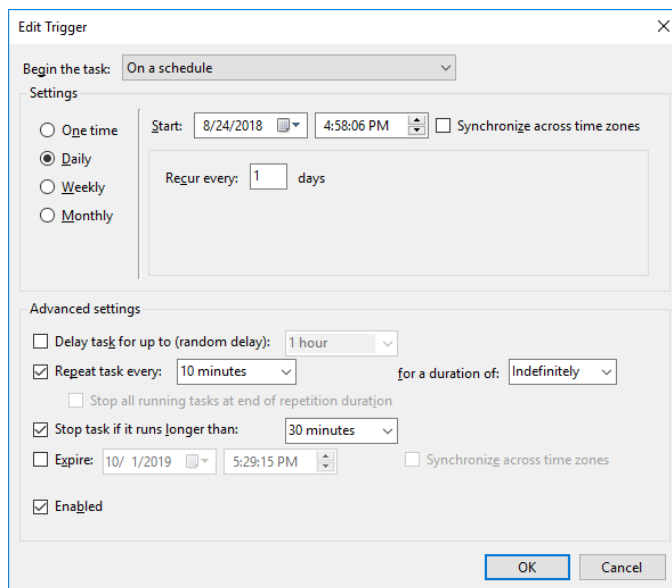
Synchronizing SMART TeamWorks calendars with Exchange

To synchronize appointments between Exchange calendars and the SMART TeamWorks Server calendars, set up a scheduled task.

To create a scheduled task for synchronizing calendars

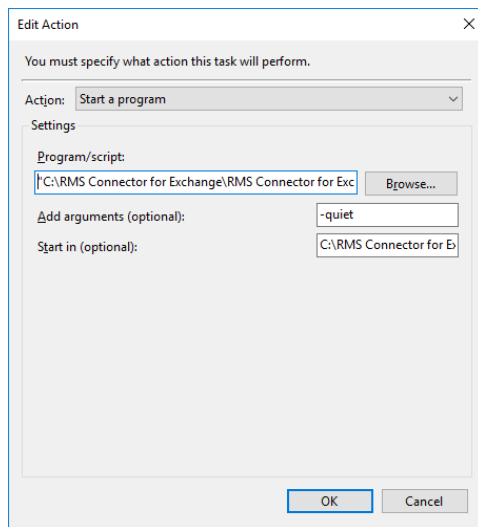
1. Open Windows Task Scheduler.
2. Select **Action > Create task** to create a new task.

3. In the *Create Task* dialog box, open the *General* tab and complete these actions:
 - Enter a name for the task
 - Enter a description (optional)
 - Select **Run whether user is logged on or not**
 - Select **Run with highest privileges**
 - Select **Hidden**
4. Open the *Triggers* tab and click **New** to create a new trigger.



5. Create a new trigger with the following options:
 - Under *Settings*, select the **Daily** option and set to recur every **1** days.
 - Under *Advanced settings*, use the following settings:
 - Select the *Repeat task every* check box, then select **5 minutes** as the time interval.
 - In the *for a duration of:* drop-down, select **Indefinitely**.
 - Select the *Stop task if it runs longer than* check box, then select **30 minutes** as the time interval.
 - Select **Enabled**.
6. Click **OK** to return to the *Create Task* dialog box.

- Open the *Actions* tab and click **New** to create a new action.



- In the *Actions* drop-down menu, select **Start a program**.
- Click **Browse** and browse to the location of the *RMS Connector for Exchange.exe* file you installed. See *Installing the RMS Connectors Configurator and RMS Connector for Exchange* on page 32.
- Select the *RMS Connector for Exchange.exe* and click **Open**. After you select the executable, the path should look similar to this:

C:\RMS Connector and Configurator\RMS Connector for Exchange\RMS Connector for Exchange.exe

- In the *Add arguments* field, enter **-quiet**.
- In the *Start in* field, enter the path to the folder that contains *RMS Connector for Exchange.exe*. For example:

C:\RMS Connector and Configurator\RMS Connector for Exchange

- Open the *Conditions* tab and clear all the check boxes.
- Open the *Settings* tab and select the following options:
 - Allow task to be run on demand**
 - Run task as soon as possible after a scheduled start is missed**
 - If the task fails, restart every 1 minute, and Attempt to restart up to 3 times**
 - Stop the task if it runs longer than 1 hour**
 - If the running task does not end when requested, force it to stop**
- Click **OK**.

16. In File explorer, return to the *RMS Connector for Exchange* folder and delete the *logs* folder.
17. Return to the Windows *Task Manager* and run the new task you created.

Create a task to clean temporary files

You can create a task to remove temporary files that are older than 24 hours.

To create a task for cleaning temporary files

1. Create a new batch file named **CleanTempFolders.bat** that contains the following commands:

```
@echo off
REM Remove all files older than 1 day
SETLOCAL ENABLEEXTENSIONS
forfiles /p "[Drive]:\RMS Connector for Exchange\attachments" /d -1 -c "cmd
/c IF @isdir == TRUE rd /s /q @path"
forfiles /p "[Drive]:\RMS Connector for Exchange\temp" /d -1 -c "cmd /c IF
@isdir == TRUE rd /s /q @path"
```

Where *[Drive]* is your chosen location for the RMS Connector for Exchange. See page 32.

2. Open the Windows *Task Scheduler* and select **Action > Create Task**.
3. On the *General* tab, enter a name for the task (for example, "RMS Temporary File Cleanup") and use the following options:
 - Select **Run whether user is logged on or not**
 - Select **Run with highest privileges**
 - Select **Hidden**
4. On the *Triggers* tab, create a new trigger with the following settings:
 - Begin the task: **On a schedule**
 - Select the **Daily** option
 - Set to recur every **1** day
 - Repeat task every: **10 minutes**
 - Set the duration to: **Indefinitely**
 - Stop task if it runs longer than: **1 hour**
 - Select **Enabled**.

5. On the *Actions* tab, create a new action with the following settings:
 - Set the action type as: **Start a program**
 - In the program script, browse to or enter the path to the batch file you created in step 1.
 - In the *Start in (optional)* field: enter the path to the folder that contains the **CleanTempFolders.bat** file.
6. On the *Settings* tab, select the following check boxes and settings:
 - **Allow task to be run on demand**
 - **Run task as soon as possible after a scheduled start is missed**
 - **If the task fails, restart every 5 minutes**
 - **Attempt to restart up to 3 times**
 - **Stop the task if it runs longer than 1 hour**
 - **If the running task does not end when requested, force it to stop**
 - **Do not start a new instance**
7. Click **OK** to save the task.

Updating SMART TeamWorks Server

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Update SMART TeamWorks Server to the latest version available on the smarttech.com website.

Downloading the installation files

Before you begin updating the SMART TeamWorks Server, get the latest installation files from the SMART website.

To download the latest version of SMART TeamWorks Server

1. In a browser, go to home.smarttech.com/interactive-displays-for-business/teamworks/download.
2. From the *Select your version* drop-down list, select the latest **SMART TeamWorks Server** version.
3. Select **I've already purchased a license** and choose whether you'd like to receive emails from SMART.
4. Click **DOWNLOAD - WINDOWS**.
5. Extract the downloaded file to a folder on your computer. After the extraction, the folder contains five EXE files.
6. In that same local folder, create the following sub-folders:
 - o RMS Connector for Exchange-Update
 - o RMS Connectors Configurator-Update
 - o RMS Database Scripts-Update
 - o RMS Meeting Server, Compact Edition for IIS-Update
 - o RMS Web Portal for IIS-Update

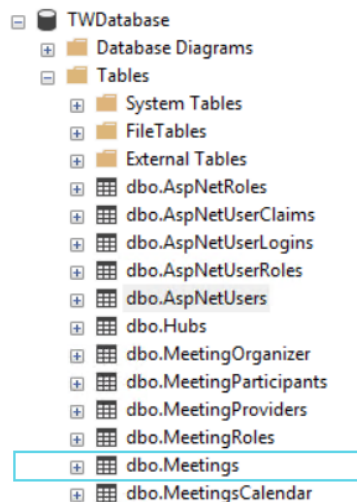
7. Run the **RMS_Connector_for_Exchange.exe** file, enter the path to the **RMS Connector for Exchange-Update** folder you created in the previous step, and click **Extract**.
8. Repeat step 7 for each EXE, extracting each EXE file to its corresponding folder you created in step 6.

Updating the SMART TeamWorks Server database and IIS Servers

After downloading and extracting the latest installation files for SMART TeamWorks Server, update the Server's database and IIS Servers.

To update the SMART TeamWorks Server database

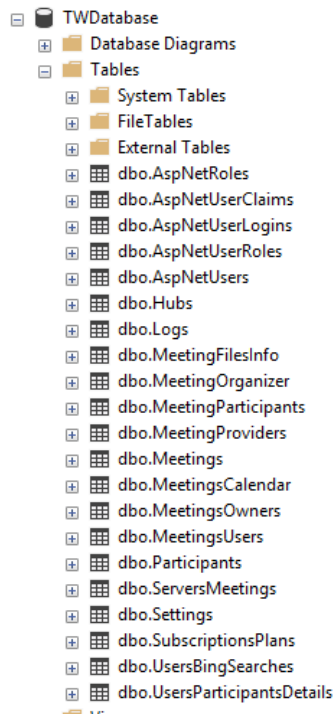
1. Open *SQL Server Management Studio* and back up the database you installed for SMART TeamWorks Server (see Page 5). Save the backup to a secure location.
2. Browse to the SMART TeamWorks Server database's **Tables > dbo.Meetings**.



3. Delete the following constraints and index keys:
 - Connections
 - LocalConnections

4. In the *RMS Database Scripts-Update* folder you previously created, execute the **update database.sql** script using the *SQL Management Studio* for the existing SMART TeamWorks Server database.

After the script has finished running, the database should look like the following:



To update the IIS Servers

1. Open the *IIS Management* console.
2. Stop the *RMS Meeting Server* and *RMS Web Portal* websites.
3. Back up the file system folders for both websites, and save the backup to a secure location.
4. In File Explorer, browse to **C:\inetpub\wwwroot** and create a folder called **Backups**.
5. Copy the following folders contained in C:\inetpub\wwwroot\:
 - o MeetingServer
 - o WebPortal

6. Paste the copied folders in the *Backups* folder you created in step 4, then rename the folders as follows:

- MeetingServer-Backup
- WebPortal-Backup

You can use these backups to restore the previous working installation if an error occurs during the update.

7. In File Explorer, browse to **C:\inetpub\wwwroot\MeetingServer**.
8. Delete everything in the folder except for the *App_Data* folder.

 **IMPORTANT**

Do not change the file system's access rights.

9. Open the *RMS Meeting Server, Compact Edition for IIS-Update* folder in another window, copy all its contents, and paste them into the **C:\inetpub\wwwroot\MeetingServer** folder.
10. Open the **Web.config** file in a text editor.
11. Browse to the *MeetingServer-Backup* folder you created and open its **Web.config** file in another instance of the text editor.

12. Compare the two **Web.config** files and copy the following settings from the backed up file to the new one:

- a. `httpRuntime maxLength="307200"`
- b. `httpRuntime executionTimeout="900"`
- c. `globalization uiCulture="en-US" culture="en-US"`
- d. `machineKey
validationKey="2D32F2D5D2D569938C8E99B4D4DC263A80F7842CBE2D2F1638323D6808
1BE795542A2472A5D15054A22267EC59941BDDE50386818C9103B02121BB8E60B5E312"de
cryptionKey="A47E22BC79E0808F9B6959F6A4DCFAAFD48627473C8DADA46856DA2767E5
FF05" validation="SHA1" decryption="AES"`
- e. `requestLimits maxAllowedContentLength="314572800"`
- f. `add name="RMSEntities"
"metadata=res://*/Entities.RMSModel.csdl|res://*/Entities.RMSModel.ssd|r
es://*/Entities.RMSModel.msl;provider=System.Data.SqlClient;provider
connection string="data source=YOUR_SQL_SERVER;initial catalog=YOUR_
RMS_DATABASE;user id=YOUR_DB_USERNAME;password=YOUR_DB_
USERPWD;multipleactiveresultsets=True;application
name=EntityFramework";"`

! IMPORTANT

The values for the settings above will be different from these defaults because of the SMART TeamWorks meeting servers' initial configuration (see Page 15). Items d and f in particular will be unique to your installation.

13. In File Explorer, browse to **C:\inetpub\wwwroot\WebPortal**.
14. Delete all contents in the folder *except* for the *App_Data* folder.

! IMPORTANT

Do not change the file system's access rights.

15. Open the *RMS Web Portal for IIS-Update* folder in another window, copy its contents, and paste them into the **C:\inetpub\wwwroot\WebPortal** folder.

16. Open the **Web.config** file in a text editor.
17. Browse to the *WebPortal-Backup* folder you created and open its **Web.config** file in another instance of the text editor.
18. Compare the two **Web.config** files and copy the following settings from the backed-up file to the new one:

a. `globalization uiCulture="en-US" culture="en-US"`

b. `machineKeyvalidationKey="2D32F2D5D2D569938C8E99B4D4DC263A80F7842CBE2D2F1638323D68081BE795542A2472A5D15054A22267EC59941BDDE50386818C9103B02121BB8E60B5E312"decryptionKey="A47E22BC79E0808F9B6959F6A4DCFAAFD48627473C8DADA46856DA2767E5FF05" validation="SHA1" decryption="AES"`

c. `<add name="IdentityDbContext" connectionString="Server=YOUR_SQL_SERVER;Database=YOUR_RMS_DATABASE;User Id=YOUR_DB_USERNAME;Password=YOUR_DB_USERPWD;MultipleActiveResultSets=True;"`

d. `add name="RMSEntities"
"metadata=res://*/Entities.RMSModel.csdl|res://*/Entities.RMSModel.ssd1|res://*/Entities.RMSModel.msl;provider=System.Data.SqlClient;provider connection string="data source=YOUR_SQL_SERVER;initial catalog=YOUR_RMS_DATABASE;user id=YOUR_DB_USERNAME;password=YOUR_DB_USERPWD;multipleactiveresultsets=True;application name=EntityFramework""`

 **IMPORTANT**

The values for the settings above will be different from the defaults because of the SMART TeamWorks web portal's initial configuration (see Page 20).

19. Open the *IIS Management* console and restart the *RMS Meeting Server* and *RMS Web Portal* websites.

Updating the meeting room configuration file and Exchange connection

After the database and IIS servers have been updated, complete the following procedures to update:

- The meeting room configuration files using the *RMS Connectors Configurator*
- The connection between the web portal's meeting room accounts with the meeting room accounts on your organization's Exchange server using the *RMS Connector for Exchange*

To update the RMS Connectors Configurator

1. In File Explorer, browse to the *RMS Connectors Configurator* folder.
2. Copy this folder and paste it to a backup folder. Rename the folder *RMS Connectors Configurator-Backup*.
3. Open the *RMS Connectors Configurator-Update* folder and copy all contents to the existing *RMS Connectors Configurator* folder to replace the existing files.
4. After the transfer is complete, run the **RMS Connectors Configurator.exe** and click **File > Open**.
5. Open the existing .rms files and check that all the settings for each meeting room are correct.
6. Save the .rms file before closing the *RMS Connectors Configurator* to refresh its settings.

To update the RMS Connector for Exchange

1. In File Explorer, navigate to the existing *RMS Connector for Exchange* folder.
2. Copy this folder and paste it to a backup folder. Rename the folder *RMS Connector for Exchange-Backup*.
3. In the existing *RMS Connector for Exchange* folder, delete everything *except* for the following items:
 - attachments
 - config
 - logs
 - temp
 - templates

4. Open the *RMS Connector for Exchange-Update* and copy all the files except for the following items:
 - attachments
 - config
 - logs
 - temp
 - templates
5. Paste the copied items into the existing *RMS Connector for Exchange* folder.
6. Open the **RMS Connector for Exchange.exe.config** file in a text editor.
7. Open the *RMS Connector for Exchange-Backup* folder and open its **RMS Connector for Exchange.exe.config** file in another instance of the text editor.
8. Compare the two **RMS Connector for Exchange.exe.config** files and copy the following settings from the backed-up file to the new one:
 - a. In the `<appSettings>` section:

```
<add key="RmsConnectorConfigurationFile" value="config\Connector.rms" />  
<add key="EmailSenderName" value="SMART TeamWorks" />  
<add key="EmailSenderAddress" value="noreply@remago.com" />  
<add key="EmailTemplatesFolder" value="templates" />
```

- b. If your organization configured SMART TeamWorks to use a vanity URL for one of SMART TeamWorks'-supported web conferencing applications, copy the settings in the `<AvGroupConfigs>` section:

```
<add type="[type]" mode="[mode type]" value="[URL]" />
```

 **IMPORTANT**

The values for the settings above will be different from these defaults because of SMART TeamWorks's initial configuration (see Page 38).

9. Save the changes to the *RMS Connector for Exchange.exe.config* file.
10. Test the configuration of the *RMS Connector for Exchange* by opening a command window and running the following command: **RMS Connector for Exchange.exe**.

The command's output should confirm a successful test.

Updating the configuration in the web portal

In SMART TeamWorks Server 3.0, the web portal dashboard was enhanced with new features and settings. Sign in to the web portal and configure the following new settings:

- File storage settings (see Page 26)
- Global data settings (see Page 27)
- Account types for web portal users (see Page 28)

Appendix A

Customize notification email templates

If you configured the server to send email notifications to the meeting's organizer and participants (see *Installing the RMS Connectors Configurator and RMS Connector for Exchange* on page 32), you can use the default templates included, or you can customize the templates.

Understanding the email notification templates

Here are the default templates for email notifications:

Email to the meeting organizer

You own a Planned Meeting

Subject: {{subject}}
Schedule: {{dateTime}}
Meeting Room: {{room}}
Organizer: {{organizer}}
Attendees: {{participants}}

Meeting Server: {{{meetingServerUrl}}}

Meeting ID: {{meetingId}}
Moderator PIN: {{moderatorPin}}
Client PIN: {{clientPin}}

Use a **SMART TeamWorks** contributor app to connect.

Download the **Windows 10 app** from the meeting room Hub or install the app for [iOS](#) and [Android](#) from public stores.

>>> [{{sharedLink}}](#) <<<

{{joinOnlineType}} Web Conference:
[{{joinOnlineMeetingUrl}}](#)

Sent through RMS by SMART Technologies

Email to meeting participants

You have been invited to a Planned Meeting

Subject: {{subject}}
Schedule: {{dateTime}}
Meeting Room: {{room}}
Organizer: {{organizer}}
Attendees: {{participants}}

Meeting Server: {{{meetingServerUrl}}}

Meeting ID: {{meetingId}}
Client PIN: {{clientPin}}

Use a **SMART TeamWorks** contributor app to connect.

Download the **Windows 10 app** from the meeting room Hub or install the app for [iOS](#) and [Android](#) from public stores.

>>> [{{sharedLink}}](#) <<<

{{joinOnlineType}} Web Conference:
[{{joinOnlineMeetingUrl}}](#)

Sent through RMS by SMART Technologies

APPENDIX A
CUSTOMIZE NOTIFICATION EMAIL TEMPLATES

The variables in the templates populate as described here:

Variable	Populates with
{{subject}}	The meeting's subject as entered by the organizer when creating the meeting
{{dateTime}}	The meeting's date and time
{{room}}	The meeting's location
{{organizer}}	The meeting organizer's name or email
{{participants}}	A list of attendees invited by the meeting's organizer
{{meetingServerUrl}}	The URL for your organization's SMART TeamWorks Server
{{meetingId}}	The meeting ID
{{moderatorPin}}	<p>The moderator's PIN</p> <p>The meeting organizer uses the moderator's PIN to join the meeting's whiteboard session. Using this PIN when joining gives the meeting organizer full access, including control of participants' access (giving them read-only or write access).</p> <hr/> <p>NOTE</p> <p>The {{moderatorPin}} variable is populated only if you configured PIN protection. See <i>Installing the RMS Connectors Configurator and RMS Connector for Exchange</i> on page 32.</p> <hr/>
{{clientPin}}	<p>The participant's PIN</p> <p>Participants invited to this meeting use this PIN to join the SMART TeamWorks whiteboard session. Participants join with read-only access until the meeting organizer changes their permissions.</p>
{{sharedLink}}	A direct link that all meeting attendees can click to join using the SMART TeamWorks Contributor app installed on their device (Windows 10, iOS, or Android). In the email to meeting participants, this link appears with the text: "Connect to this meeting"
{{joinOnlineType}}	The name of the web conference tool the meeting's organizer has added to the meeting.
{{joinOnlineMeetingUrl}}	The URL for the web conference tool.

Customizing the notification email templates

You can customize the body of the template to suit the needs of your organization. Change only the section in the template described in the steps below. Other values and variables should not be customized to avoid errors with the email notification.

To customize the notification email templates

1. In File explorer, browse to the *RMS Connector and Configurator* folder you created (see page 32) and open the *RMS Connector for Exchange > Templates* folder.
2. Open the folder for the template you'd like to customize (either *organizer* or *participant*).
3. Right-click **body.html** and open with a text editor or XML editor.
4. Edit the following text in the body of the email:

```
<p>  
  
    Use a <b>SMART TeamWorks</b> contributor app to connect.<br />  
    Download the <b>Windows 10</b> app from the meeting room Hub or  
    install the app for <a  
    href="https://itunes.apple.com/app/teamworks-  
    app/id1437274202">iOS</a>  
    and <a  
    href="https://play.google.com/store/apps/details?id=com.smarttech  
    .smartteamworks">Android</a>  
    from public stores.  
  
</p>
```

NOTE

SMART recommends that you leave the links to the SMART TeamWorks Contributor apps in place so participants can easily download the apps before a meeting.

5. Save the file.

IMPORTANT

Do not change the file name as it will result in errors.

Appendix B

Log optimizations

Logs contain detailed information about queries made to the Microsoft Exchange server and communications with the SMART TeamWorks Server. When a server is running well, you can reduce the level of logging (for example, to log only errors) to save disk space and optimize performance.

To customize what the logs track

1. In File explorer, browse to the *RMS Connector and Configurator* folder you created. See *Installing the RMS Connectors Configurator and RMS Connector for Exchange* on page 32.
2. Open the *NLog.config* file in a text editor and look for the following tag:

```
<logger name="*" minlevel="Trace" writeTo="f" />
```
3. Set the minlevel attribute to one of the values in this table:

minlevel	Log level
Fatal	Minimum level of details. Only fatal errors are logged.
Error	Logs errors only.
Warn	Logs warnings and errors.
Info	Logs warnings, errors, and information.
Debug	Includes debug information for developers and bug discovery.
Trace	Maximum level of details. All debug/trace information is logged.

SMART TECHNOLOGIES

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