## ScreenBeam Message Manager

**Deployment Guide** 

Version: 1.0

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## Part I Planning

This deployment guide covers the deployment for ScreenBeam Message Manager.

The ScreenBeam Message Manager (SBMM) is a messaging application that enables school staff to send and manage messages to ScreenBeam receivers throughout a school campus. The system supports different message formats, scheduled delivery, and targeted distribution to specific receivers or groups of receivers.

#### 1.1 Basic

Follow these guidelines for ScreenBeam Message Manager deployment:

- Ensure that Internet access is available for user devices, CMS Enterprise server and ScreenBeam receivers.
- Prepare the account owner of your ScreenBeam Cloud account. Generally, this user
  is the IT admin of the organization who apply for a ScreenBeam Cloud account.
- Activate an Administrative Tools license on ScreenBeam Cloud. Contact your account manager to procure one.
- ScreenBeam CMSE (4.4.14.0 or later) is deployed and is connected to ScreenBeam Cloud service.
- ScreenBeam 1xxx series receiver is installed with firmware 11.x.17.3 or later.
- Ensure that the necessary components have access to ScreenBeam Cloud: https://cloud.screenbeam.com/
   and the site is whitelisted from SSL decryption.

### 1.2 Deployment Flow

A typical flow for deploying ScreenBeam Message Manager is as follows:

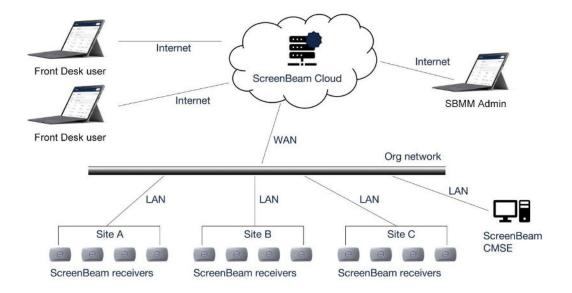
- Create your ScreenBeam Cloud account and/or login to ScreenBeam Cloud and bind your CMSE to it.
  - Note: Refer to the ScreenBeam CMS deployment guide for details on how to create a ScreenBeam Cloud account.
- Procure an Administrative Tools license and activate it on ScreenBeam Cloud.
- 3. Install ScreenBeam receivers and connect them to ScreenBeam CMSE.
- 4. Assign Administrative Tools license to ScreenBeam receivers via ScreenBeam CMSE.
- 5. The IT admin adds users to ScreenBeam Cloud for managing ScreenBeam messages and assigns **Message Manager Adminstrator** role to them.
- 6. The IT admin assigns CMS sites to these SBMM admins.
- 7. The SBMM admin adds users to ScreenBeam Cloud and assigns the Front Office

**Personnel** role to these users. They receive the CMS site assignment from the SBMM Site Admin.

- 8. SBMM Site admin creates receiver groups and assigns receivers to them.
- 9. SBMM Front Desk users log into ScreenBeam cloud.
- 10. SBMM Front Desk users are ready to create and send messages to ScreenBeam receivers.

## 1.3 Topology

This diagram shows the typical topology for setting up ScreenBeam Message Manager. ScreenBeam CMSE manages all ScreenBeam receivers in the organization and it synchronizes the deployment of receivers to ScreenBeam Cloud. The SBMM Admin sets up SBMM users and sites, and the SBMM Front Desk users create and send messages to ScreenBeam receivers.



## 1.4 Recommended System Requirements

Recommended requirements for deploying the ScreenBeam Message Manager are listed below:

#### 1.4.1 ScreenBeam Receiver

The following ScreenBeam receivers are compatible with ScreenBeam Message Manager:

- ScreenBeam 1000 EDU, ScreenBeam 1000 EDU G2, ScreenBeam 1100 Plus, ScreenBeam 1100 Flex (Firmware 11.x.17.3 or later)
- The ScreenBeam receivers are connected to a network that has Internet access.

#### 1.4.2 ScreenBeam CMS

ScreenBeam CMS Enterprise (CMSE) 4.4.14.0 or later.

## Part II Setting up ScreenBeam CMSE

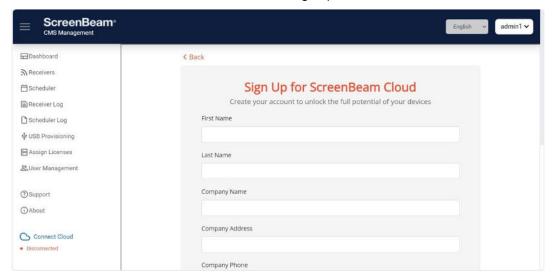
ScreenBeam CMSE 4.4.14.0 or later must be installed.

Create sites on your CMSE to group your deployed ScreenBeam receivers. SBMM Admins can only manage the receivers in the sites that are assigned to them. Front Desk users are assigned to sites by SBMM admins that manage them.

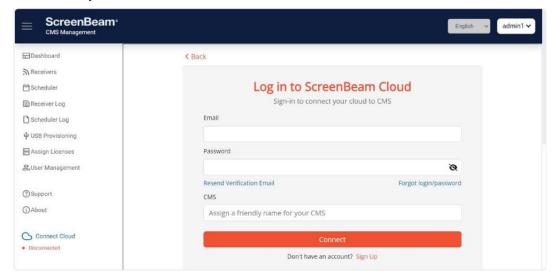
Note: Refer to the *ScreenBeam CMS Enterprise Deployment Guide* which covers installation and connecting to the Cloud procedures.

Follow the below procedure to connect your ScreenBeam CMSE to ScreenBeam Cloud.

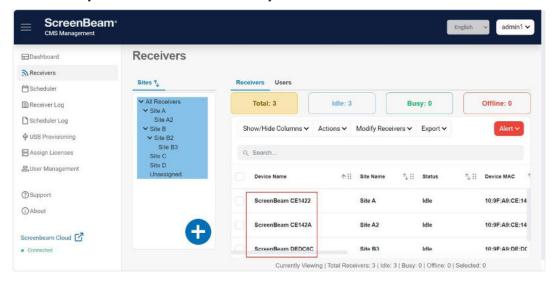
- 1. Ensure that Internet access is available to the ScreenBeam CMSE server.
- 2. Click on the Connect Cloud button and then sign up for ScreenBeam Cloud.



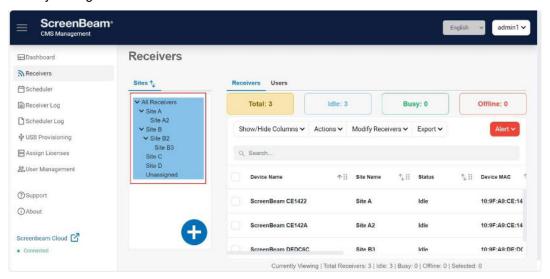
3. Connect your ScreenBeam CMSE server to ScreenBeam Cloud.



4. Connect your ScreenBeam receivers to your ScreenBeam CMSE server.



5. Create sites on your ScreenBeam CMSE and assign your ScreenBeam receivers to the sites. Ensure that the sites are created to represent the actual ScreenBeam deployment in your organization.



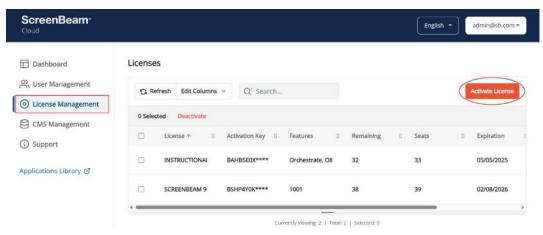
## Part III Message Manager Licensing

An Administrative Tools license is required to enable the Message Manager feature.

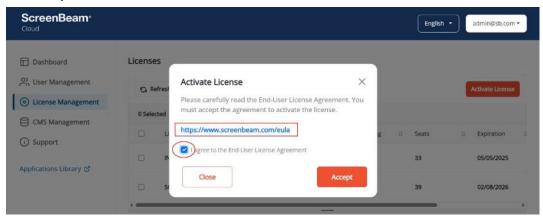
## 3.1 Activating Administrative Tools License on ScreenBeam Cloud

To activate an Administrative Tools license on ScreenBeam Cloud:

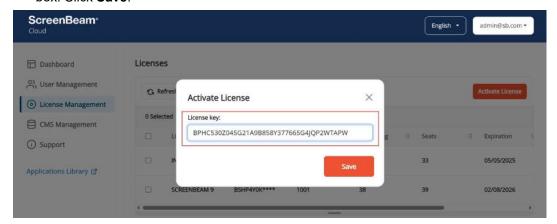
- 1. Procure an Administrative Tools license key from a ScreenBeam sales representative.
- 2. Log into ScreenBeam Cloud at <a href="https://cloud.screenbeam.com/">https://cloud.screenbeam.com/</a> with a user that has License Management privileges.
- 3. Go to the License Management page and click on the Activate License button.



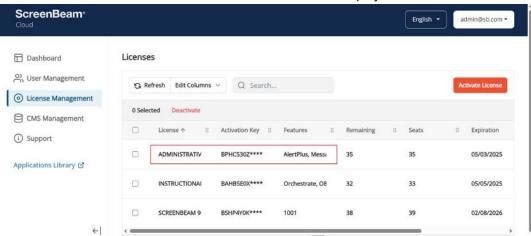
4. The Activate License box will appear. Click the EULA link and read the agreement carefully. Check the I agree to the End-User License Agreement box. And click Accept to continue.



5. Type (or copy and paste) your Administrative Tools license key in the **Activate License** box. Click **Save**.



6. Your Administrative Tools license will be activated and displayed in the Licenses table.



 The Message Manager menu will appear in the left menu pane when a user with Message Manager Administrator or Front Office Personnel privileges signs into the ScreenBeam Cloud website.

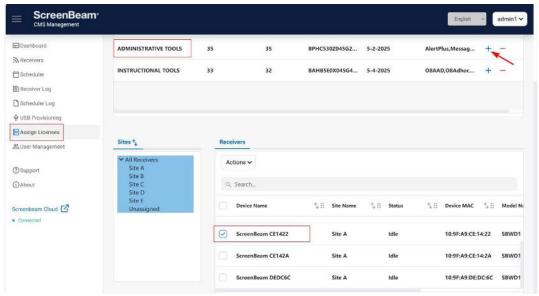


## 3.2 Assigning Administrative Tools License to ScreenBeam Receiver

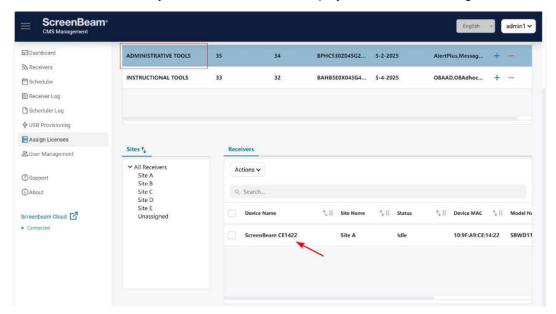
Note: Refer to the CMSE deployment guide for detailed instructions

To assign an Administrative Tools license to ScreenBeam receivers:

- 1. Ensure that your ScreenBeam receivers are connected to ScreenBeam CMSE.
- 2. Go to **Assign Licenses** page on ScreenBeam CMSE and ensure that adequate Administrative Tools license seats are available.
- On the Assign Licenses page, select the target ScreenBeam receiver(s) in the Receivers section, then locate the Administrative Tools license entry in the Licenses table, and click on the plus sign ("+") to assign an Administrative Tools license to the selected receiver(s).



4. Click on the Administrative Tools license entry to select it, and then confirm that the receivers you want to assign an Administrative Tools license to are displayed in the Receivers table. Only licensed receivers can display ScreenBeam messages.



Note: The ScreenBeam receiver must stay connected to the CMSE that assigned its license. Otherwise, the receiver's Administrative Tools license will be deactivated.

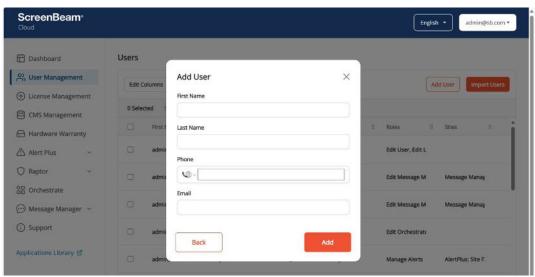
# Part IV Setting up Users for Message Manager

This section describes user management and group management for ScreenBeam Message Manager. A user with **Message Manager Administrator** privileges can manage SBMM users and receiver groups.

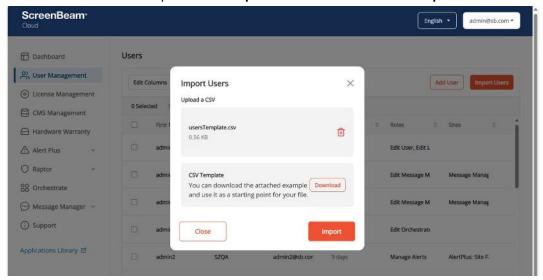
### 4.1 Creating an SBMM Admin Account

Users for managing Message Manager must be added to the ScreenBeam Cloud.

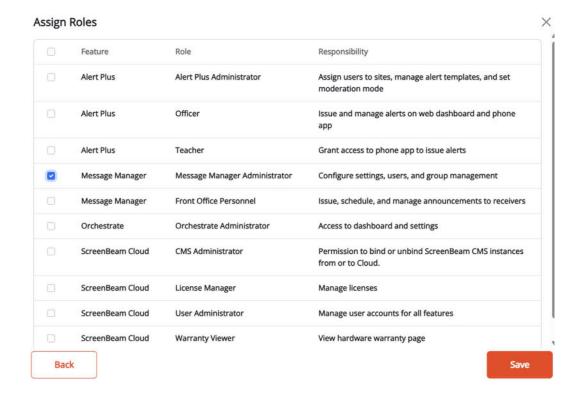
- Sign into ScreenBeam Cloud (<u>cloud.screenbeam.com</u>) with the owner of your ScreenBeam Cloud account.
- 2. If the user already exists, then select the user and click **Set Roles** and check the **Message Manager Administrator** role and Save. Skip the rest of the section.
- 3. Click on **Add User** or **Import User** on the User Management page.
  - Add User allows you to add a user one at a time. Enter a user's first name, last name, phone number, and Email address in the Add User window and click Add. A user account validation Email will be sent to the user's Email address. The user must validate the user account via the link sent to the user's Email address.



• Import Users allows you to import multiple users at a time. Download the CSV Template for importing users in the Import Users window. Edit the user import template to include your users' first names, last names, phone numbers and Email addresses. Follow the template's format when adding user info to the template. Add the edited template to the Import Users window and click Import.



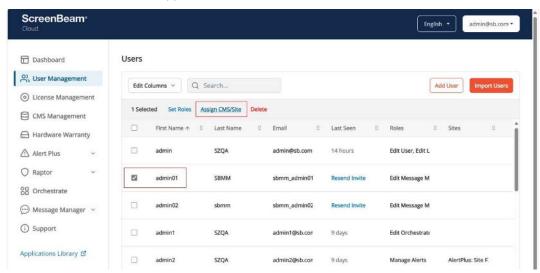
- 4. The added users will be displayed in the **Users** table and user account validation emails will be sent to their Email addresses. Inform the users to validate their user accounts through their Email accounts. New users must validate their accounts via the confirmation links sent to their Email addresses.
- Assign the Message Manager Administrator role to the newly added users.
   Select the newly added user(s), click the Set Roles button, and then select the Message Manager Administrator role in the Assign Roles table. Click Save.



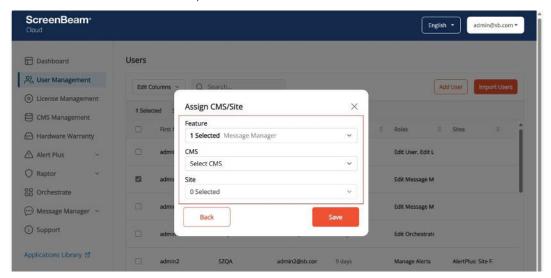
## 4.2 Assigning an SBMM Admin to a CMS Site

The SBMM admin must be assigned to at least one CMS site.

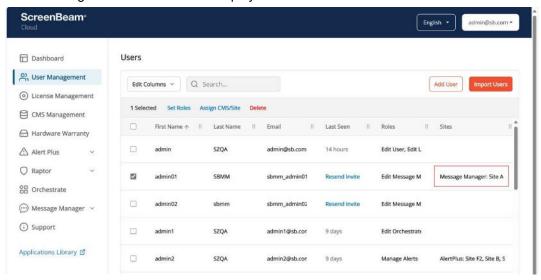
- Sign into ScreenBeam Cloud (<u>cloud.screenbeam.com</u>) with the owner of your ScreenBeam Cloud account.
- Select the newly added user and click the Assign CMS/Site button. The Assign CMS/Site window will appear.



3. In the **Assign CMS/Site** window, select **Message Manager** in the **Feature** box, select a CMS server in the **CMS** box, and select one or more sites in the **Site** box. Click **Save**.



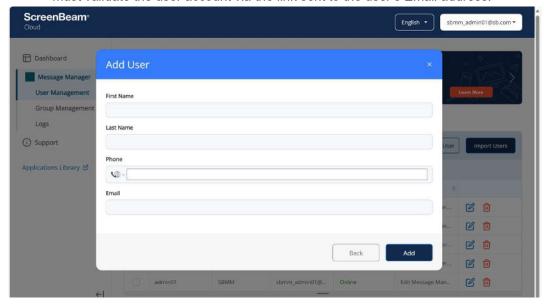
4. The assigned CMS sites will be displayed in the Sites column.



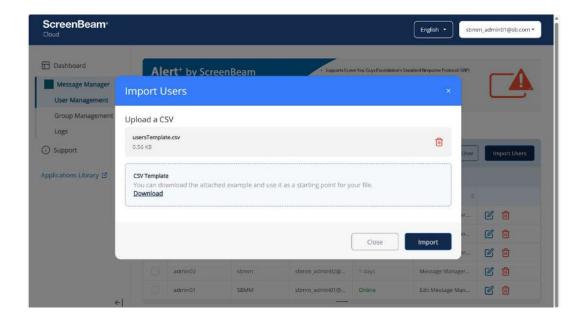
### 4.3 Creating SBMM Front Desk Users

Users for managing Message Manager must be added to the ScreenBeam Cloud.

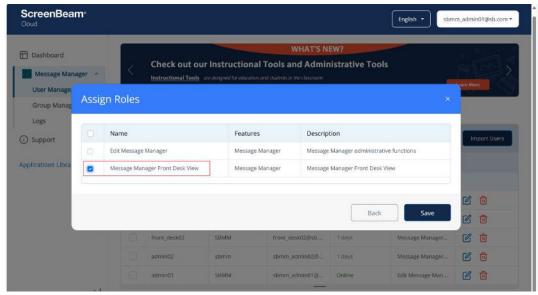
- 1. Sign into ScreenBeam Cloud (cloud.screenbeam.com) with an SBMM Admin account.
- 2. Click on **Add User** or **Import User** on the User Management page.
  - Add User allows you to add a user one at a time. Enter a user's first name, last name, phone number, and Email address in the Add User window and click Add. A user account validation Email will be sent to the user's Email address. The user must validate the user account via the link sent to the user's Email address.



• Import Users allows you to import multiple users at a time. Download the CSV Template for importing users in the Import Users window. Edit the user import template to include your users' first names, last names, phone numbers and Email addresses. Follow the template's format when adding user info to the template. Add the edited template to the Import Users window and click Import.



- The added users will be displayed in the Users table and user account validation emails
  will be sent to their Email addresses. Inform the users to validate their user accounts
  through their Email accounts. New users must validate their accounts via the
  confirmation links sent to their Email addresses.
- 4. Assign the Front Office Personnel role to the newly added users.
  Select the newly added user(s), click the Set Roles button, and then select the Front
  Office Personnel View role in the Assign Roles table. Click Save.



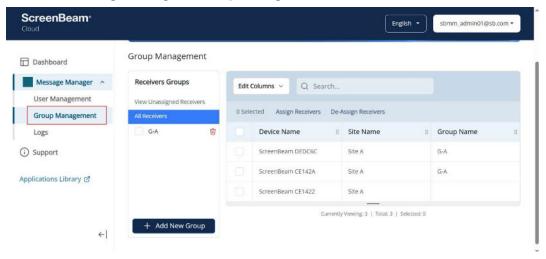
## Part V Setting up Receiver Groups

The receivers in the CMS site that is assigned to the SBMM Admin will be displayed in the SBMM Admin's receiver table. The SBMM Admin can group these receivers based on specific requirements. SBMM Front Desk users can only send messages to the receivers that are assigned to groups by the SBMM Admin.

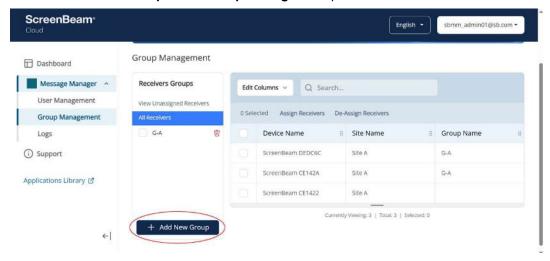
### 5.1 Creating a New Group

To set up a receiver group, follow this procedure:

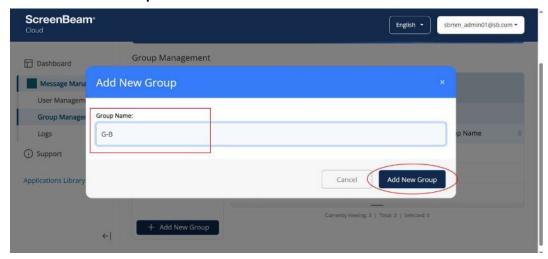
- 1. Sign into ScreenBeam Cloud (cloud.screenbeam.com) with an SBMM Admin account.
- 2. Select Message Manager > Group Management in the left menu.



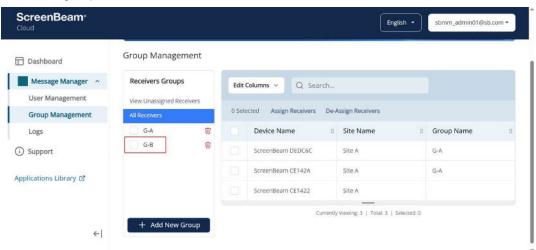
3. Click Add New Group in the Group Management pane.



4. In the **Add New Group** window, type the group name in the **Group Name** box and click the **Add New Group** button.



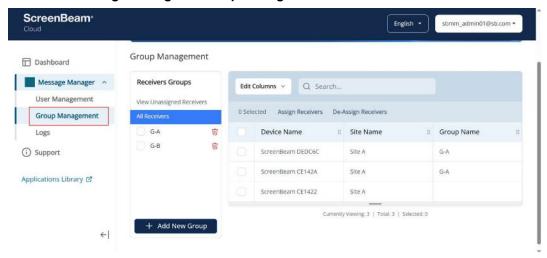
5. A new group will be added



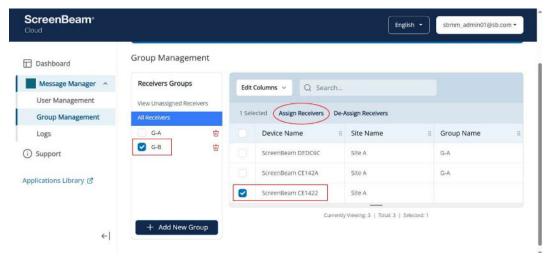
## 5.2 Assigning Receivers to a Group

To assign receivers to a group, follow this procedure:

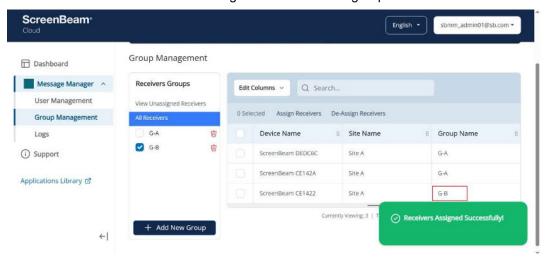
- 1. Sign into ScreenBeam Cloud (cloud.screenbeam.com) with an SBMM Admin account.
- 2. Select Message Manager > Group Management in the left menu.



 Select a group in the Receivers Groups pane and then select one or more receivers in the receiver table. Click Assign Receivers and then click Continue in the confirmation box.



4. The selected receivers will be assigned to the selected group.



## Part VI Sending Messages to ScreenBeam Receivers

The user with **Front Office Personnel** privileges can send messages to ScreenBeam receivers.

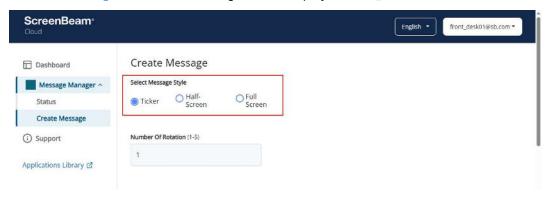
### 6.1 Sending a Message

To send a message to ScreenBeam receivers, follow this procedure:

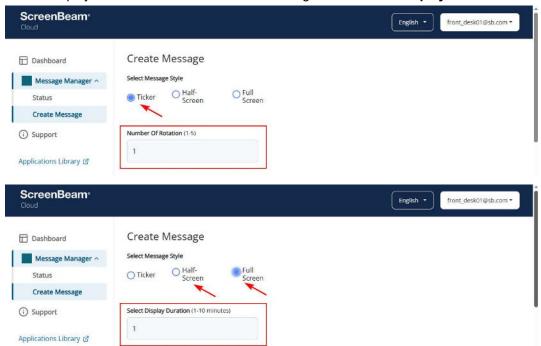
- Sign into ScreenBeam Cloud (<u>cloud.screenbeam.com</u>) with an SBMM Front Desk account.
- Select Message Manager > Create Message in the left menu. The Create Message page will be displayed.



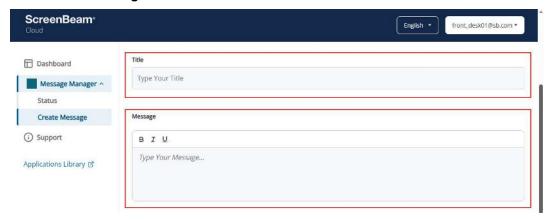
- 3. In the Create Message page, select or fill in the following message properties:
  - Select a message style in the Select Message Style section: There are three
    options: Ticker, Half Screen and Full Screen.
    - **Ticker**: The message will be displayed as a ticker on the bottom of the screen.
    - Half\_Screen: The message will be displayed in half\_screen.
    - Full-Screen: The message will be displayed in full-screen.



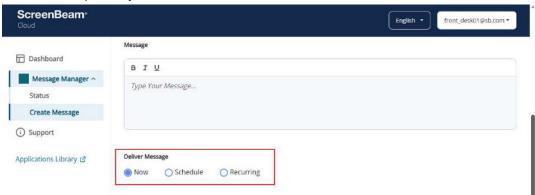
 Select number of rotations for a ticker in the Number of Rotation list, or select display duration for a half/full screen message in the Select Display Duration list.



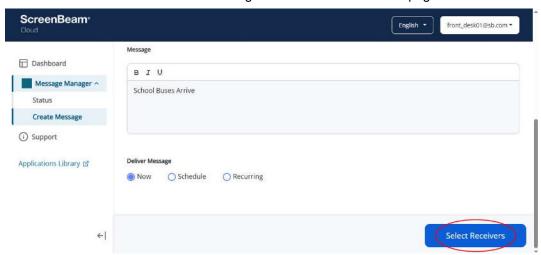
Type a title for your message in the **Title** box and type the contents of your message in the **Message** box.



- Select a delivery method. Three options are available: Now, Schedule and Recurring.
  - Now: The message will be delivered to the receiver as soon as it is sent.
  - Schedule: The message will be delivered to the receiver at a scheduled time for once only.
  - Recurring: The message will be delivered to the receiver at a scheduled time repeatedly.



4. Click the Select Receivers button to go to the Select Receivers page.



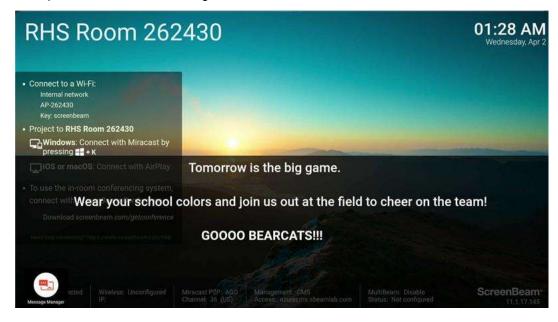
5. In the **Select Receivers** page, click the Expand/Collapse button to show the receivers of a group and then select the receiver(s) you want, or select a group of receivers by checking the group's checkbox.



6. Click the **Send Message** button. The message will be sent to the selected receivers according to the selected delivery method.



If successful a message like the following will show up on targeted displays. This is an example of a half-screen message.



## 6.2 Checking Message Status

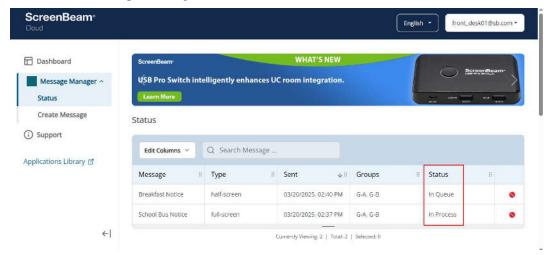
It is useful to check the status page to view the status of target groups and check if there are any messages in queue and after issuing new messages.

Follow the procedure below to check the status of your messages:

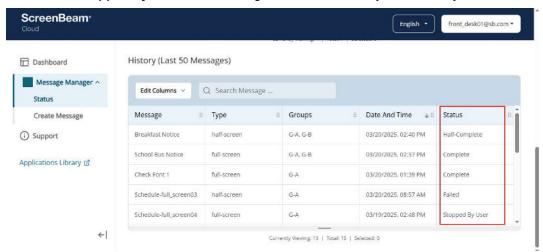
- 1. Sign into ScreenBeam Cloud (<u>cloud.screenbeam.com</u>) with an SBMM Front Desk account.
- 2. Select Message Manager > Status in the left menu. The Status page will be displayed.



- The Status table will display the status of your currently active messages: In Process, In Queue or Pending.
  - In Process: The message is being displayed.
  - In Queue: The message is queued.
  - Pending: The target receiver is not online or not licensed.



- At the bottom of the Status page is a **History** table which displays the status of messages that have attempted to be delivered.
  - Failed: The message was not delivered to the target receivers successfully.
  - · Complete: The message was delivered to all target receivers successfully.
  - Half-Complete: The message was only delivered to a subset of the targeted receivers successfully.
  - Stopped by User: The message has been manually cancelled by the user.



## 6.3 Canceling a Message

Messages can be cancelled from the queue or even while being displayed.

Follow the procedure below to cancel a message:

- 1. Sign into ScreenBeam Cloud (<u>cloud.screenbeam.com</u>) with an SBMM Front Desk account.
- 2. Select Message Manager > Status in the left menu. The Status page will be displayed.



3. Click the red stop button at the end of a message entry in the **Status** table. The message will be canceled immediately.

If the ScreenBeam receiver is connected to a touch screen, then the teacher can also dismiss a full or half-screen message by tapping on the screen.

