

# 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:

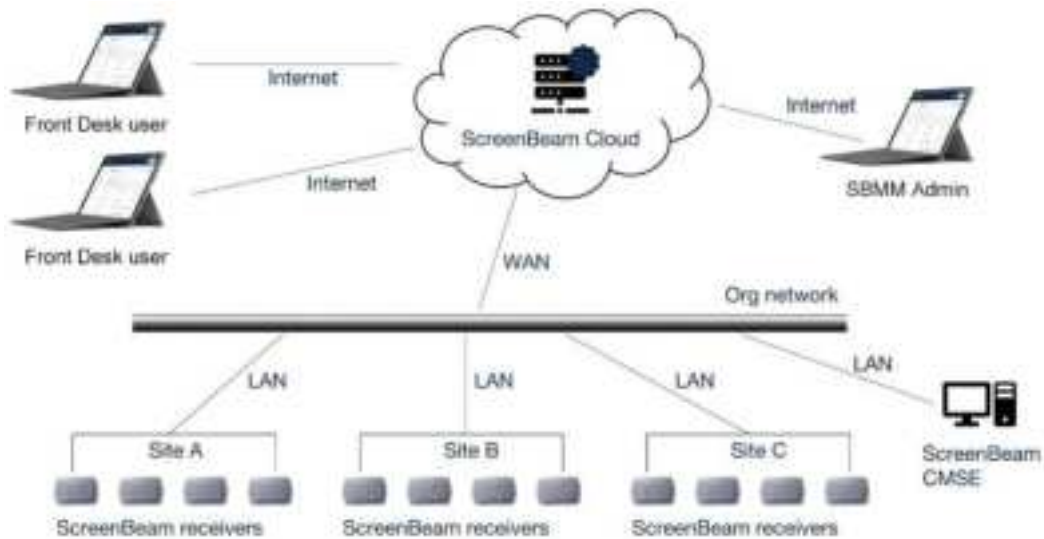
1. Create your ScreenBeam Cloud account and/or login to ScreenBeam Cloud and bind your CMSE to it.  
Note: Refer to the ScreenBeam CMS deployment guide for details on how to create a ScreenBeam Cloud account.
2. Procure an Administrative Tools license and activate it on ScreenBeam Cloud.
3. Install ScreenBeam 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 Administrator** 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.

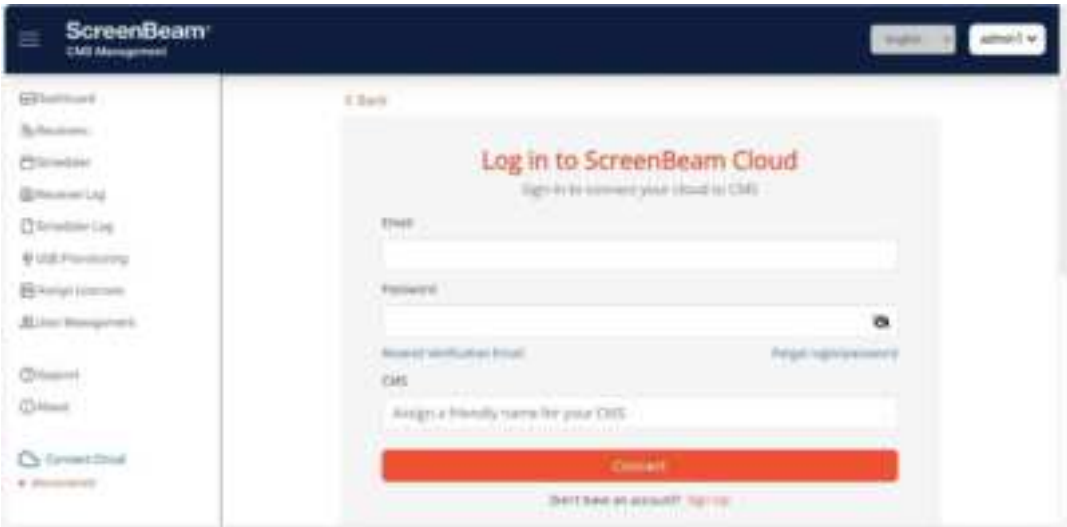
1. Ensure that Internet access is available to the ScreenBeam CMSE server.
2. Click on the Connect Cloud button and then sign up for ScreenBeam Cloud.



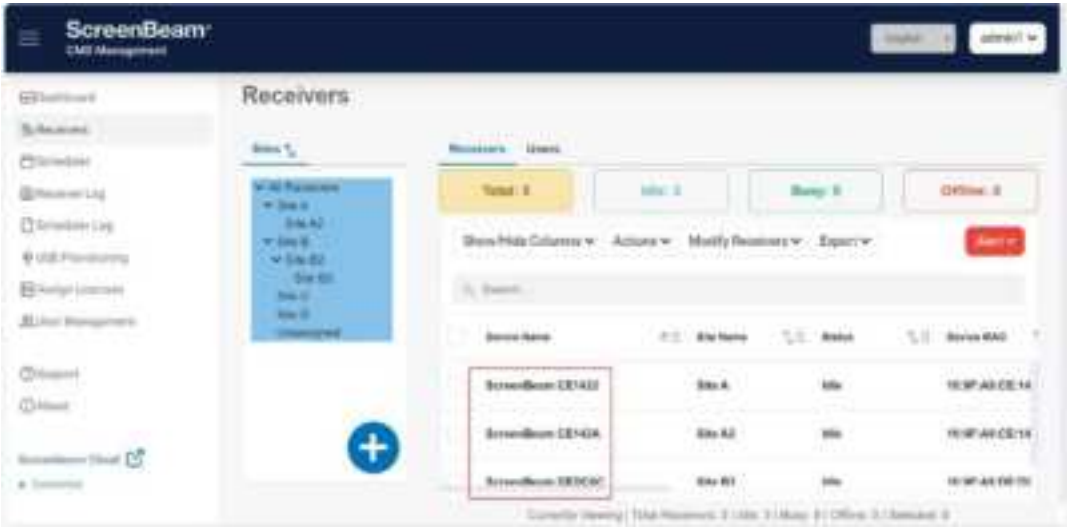
The screenshot shows the ScreenBeam CMS Management web interface. On the left is a navigation sidebar with links to Dashboard, Receivers, Receiver Log, Controller Log, USB Provisioning, Assign Accounts, User Management, Support, and About. The 'Connect Cloud' option is highlighted at the bottom of the sidebar. The main content area displays a 'Sign Up for ScreenBeam Cloud' form with the subtext 'Create your account to unlock the full potential of your devices'. The form includes input fields for First Name, Last Name, Company Name, Company Address, and Company Phone. In the top right corner of the interface, there are 'login' and 'admin' buttons.



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.

The screenshot displays the ScreenBeam CMS Management interface. The top navigation bar includes the ScreenBeam logo and a 'CMS Management' label. The left sidebar contains a list of navigation items: Dashboard, Receivers, Receiver Log, Receiver Log, USB Provisioning, Assign Receivers, User Management, Support, and About. The main content area is titled 'Receivers' and features a 'Sites' dropdown menu with a list of sites: Site A, Site B, Site C, Site D, Site E, and Site F. Below this, there is a table with columns: Receiver Name, Site Name, Status, and Service MAC. The table lists three receivers: ScreenBeam CE1402, ScreenBeam CE140A, and ScreenBeam CE140B, each assigned to a specific site (Site A, Site B, and Site C respectively) and showing a status of 'Idle'. The bottom of the interface displays a summary: 'Currently Viewing: Total Receivers: 3 (Idle: 3) / Sites: 6 (Offline: 0) / Services: 0'.

Receiver Name	Site Name	Status	Service MAC
ScreenBeam CE1402	Site A	Idle	10:5F:40:CE:14
ScreenBeam CE140A	Site B	Idle	10:5F:40:CE:14
ScreenBeam CE140B	Site C	Idle	10:5F:40:CE:14

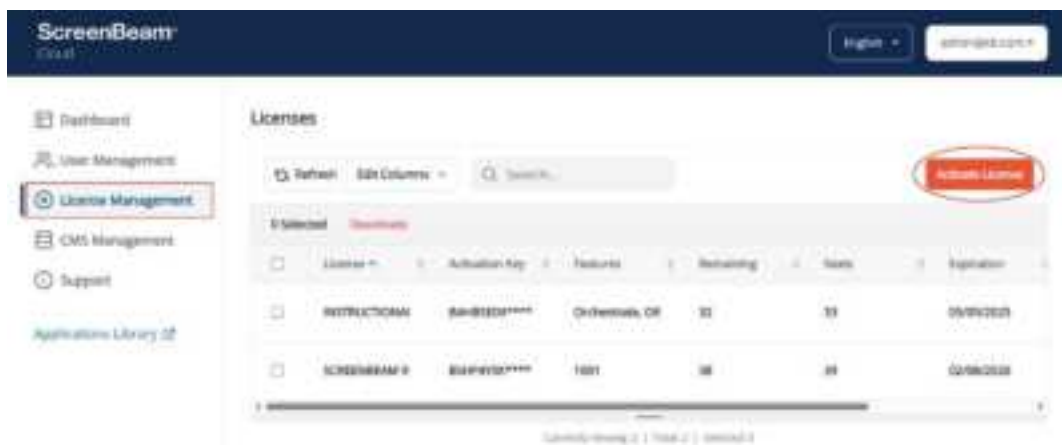
## Part III Message Manager Licensing

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

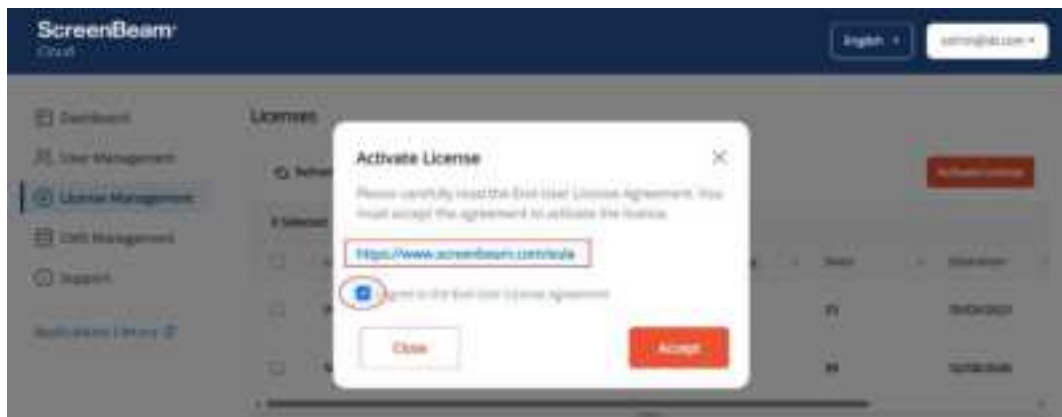
### 3.1 Activating Administrative Tools License on ScreenBeam Cloud

To activate an Administrative Tools license on ScreenBeam Cloud:

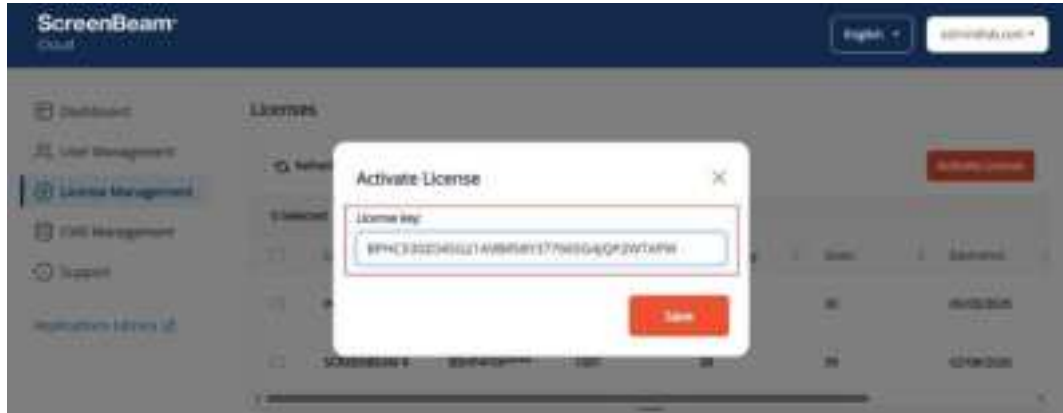
1. Procure an Administrative Tools license key from a ScreenBeam sales representative.
2. Log into ScreenBeam Cloud at <https://cloud.screenbeam.com/> with a user that has **License Management** privileges.
3. Go to the **License Management** page and click on the **Activate License** button.



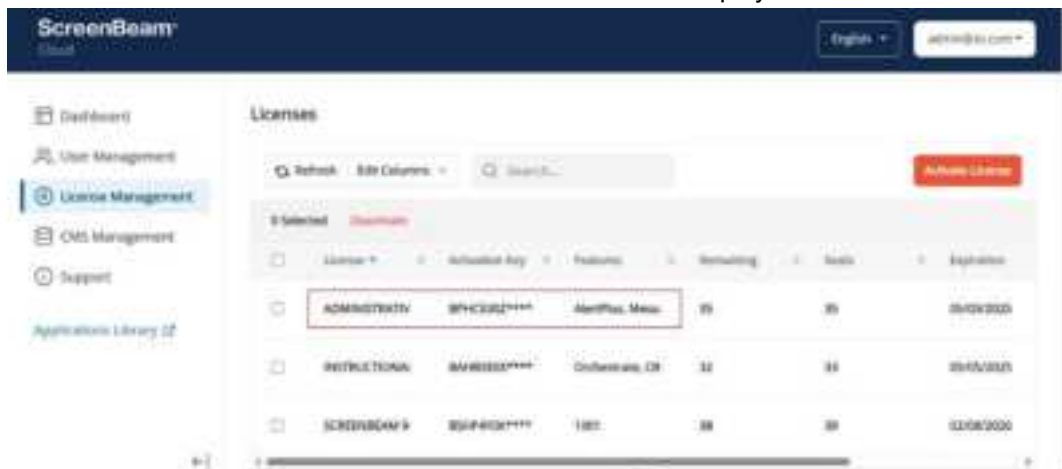
4. The **Activate License** box will appear. Click the EULA link and read the agreement carefully. Check the **I agree to the End-User License Agreement** box. And click **Accept** to continue.



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.



7. 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.

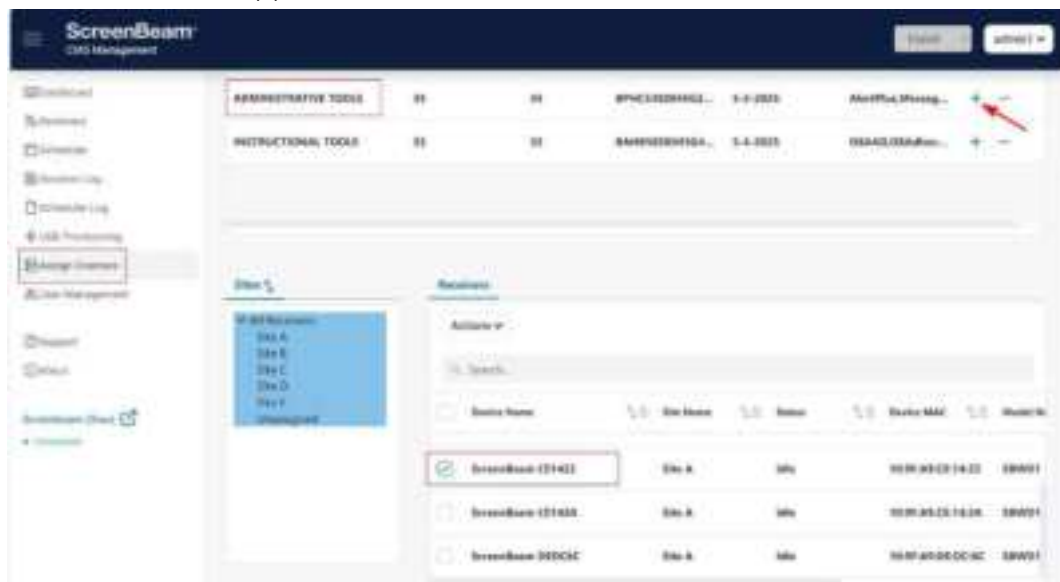


## 3.2 Assigning Administrative Tools License to ScreenBeam Receiver

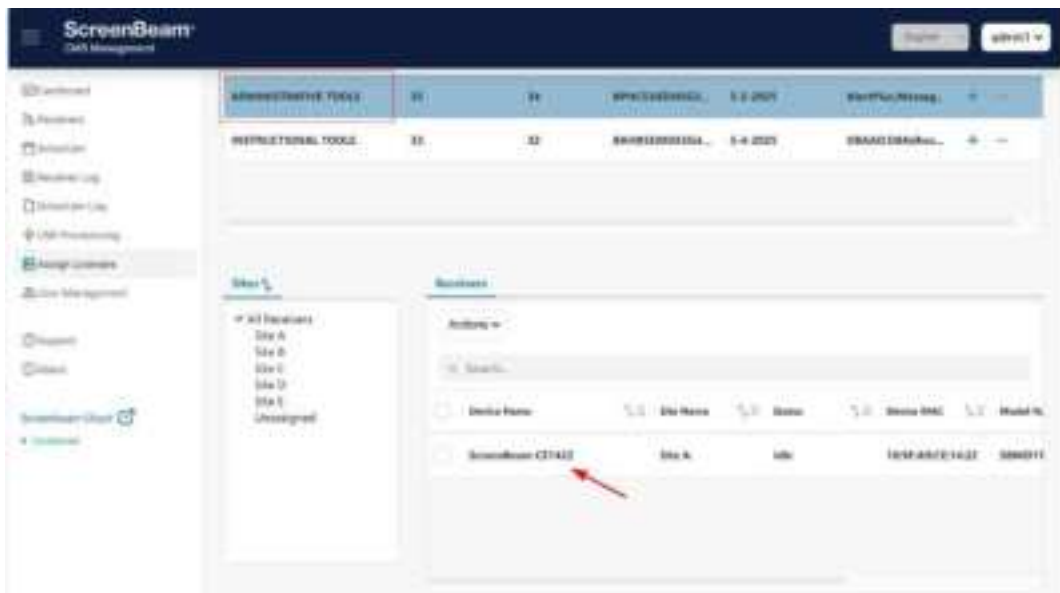
Note: Refer to the CMSE deployment guide for detailed instructions

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.
3. 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.

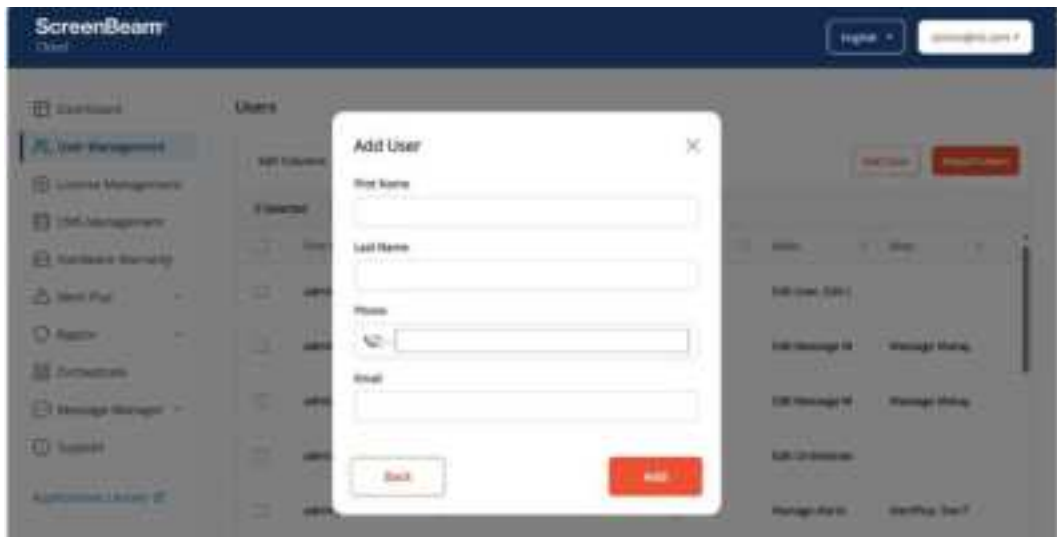
# Part IV Setting up Users for Message Manager

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.

1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](https://cloud.screenbeam.com)) 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.
5. 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**.



**Assign Roles** ✕

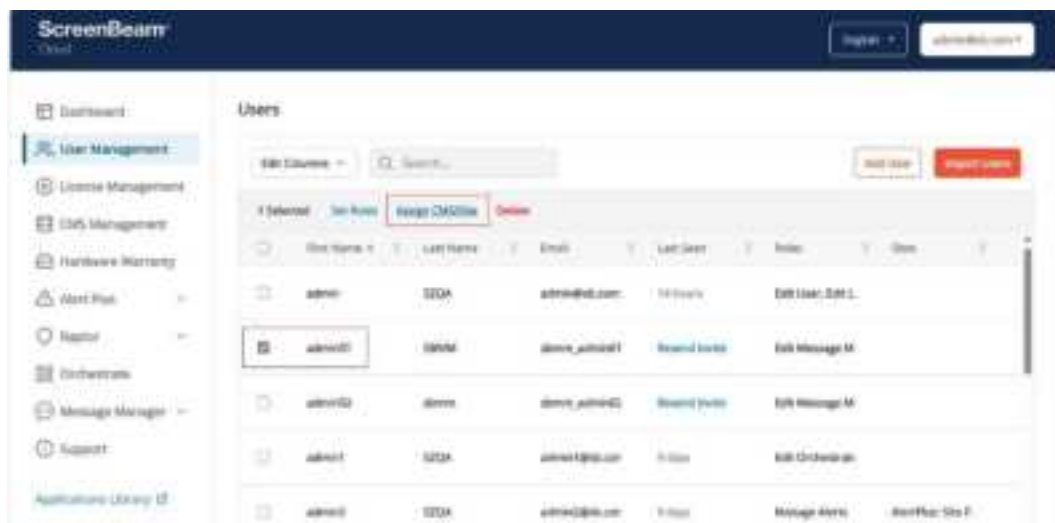
<input type="checkbox"/>	Feature	Role	Responsibility
<input type="checkbox"/>	Alert Plus	Alert Plus Administrator	Assign users to sites, manage alert templates, and set moderation mode
<input type="checkbox"/>	Alert Plus	Officer	Issue and manage alerts on web dashboard and phone app
<input type="checkbox"/>	Alert Plus	Teacher	Grant access to phone app to issue alerts
<input checked="" type="checkbox"/>	Message Manager	Message Manager Administrator	Configure settings, users, and group management
<input type="checkbox"/>	Message Manager	Front Office Personnel	Issue, schedule, and manage announcements to receivers
<input type="checkbox"/>	Orchestrate	Orchestrate Administrator	Access to dashboard and settings
<input type="checkbox"/>	ScreenBeam Cloud	CMS Administrator	Permission to bind or unbind ScreenBeam CMS instances from or to Cloud.
<input type="checkbox"/>	ScreenBeam Cloud	License Manager	Manage licenses
<input type="checkbox"/>	ScreenBeam Cloud	User Administrator	Manage user accounts for all features
<input type="checkbox"/>	ScreenBeam Cloud	Warranty Viewer	View hardware warranty page

Back Save

## 4.2 Assigning an SBMM Admin to a CMS Site

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

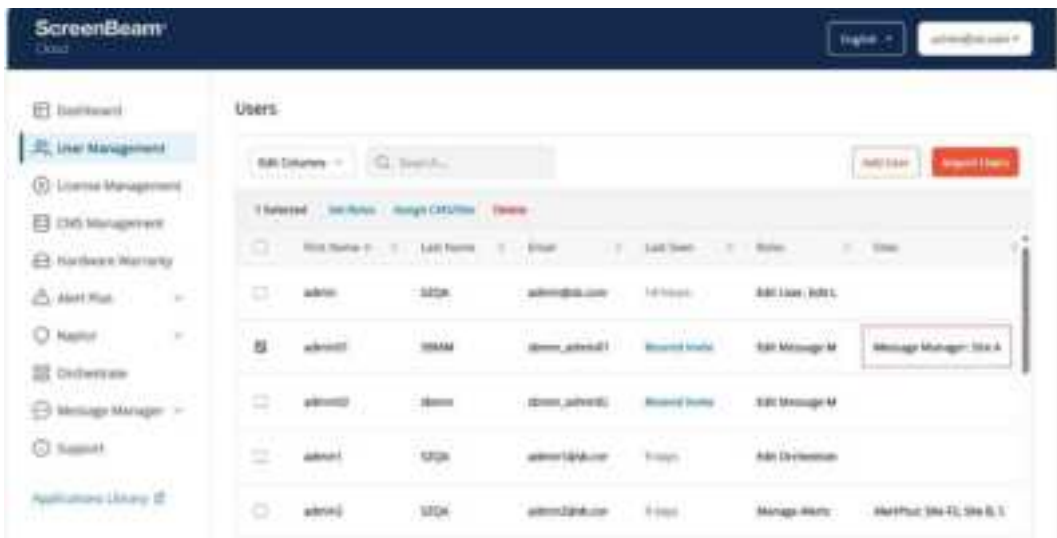
1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](https://cloud.screenbeam.com)) with the owner of your ScreenBeam Cloud account.
2. Select the newly added user and click the **Assign CMS/Site** button. The **Assign CMS/Site** window will appear.



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**.



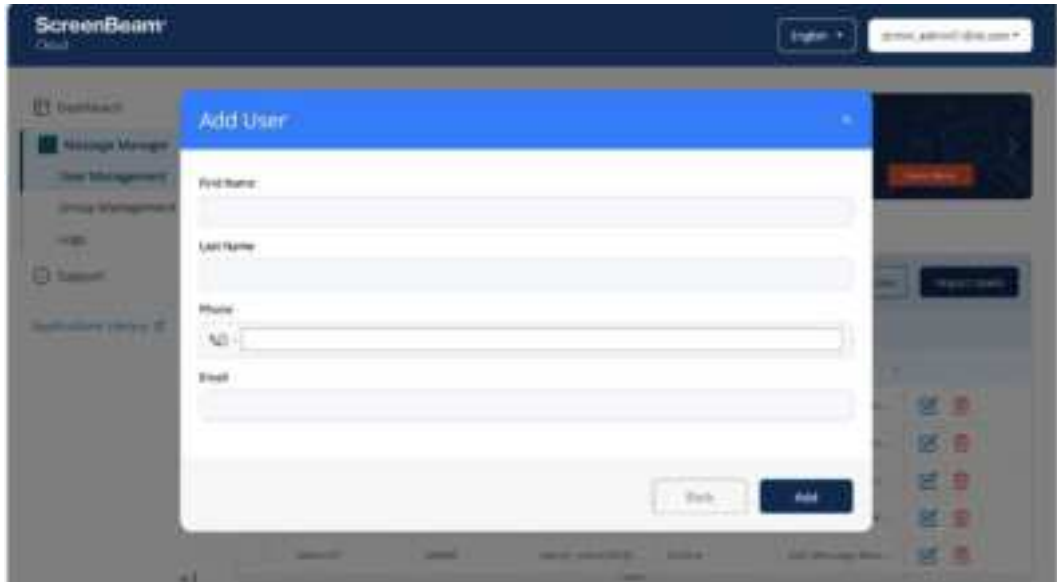
4. The assigned CMS sites will be displayed in the **Sites** column.



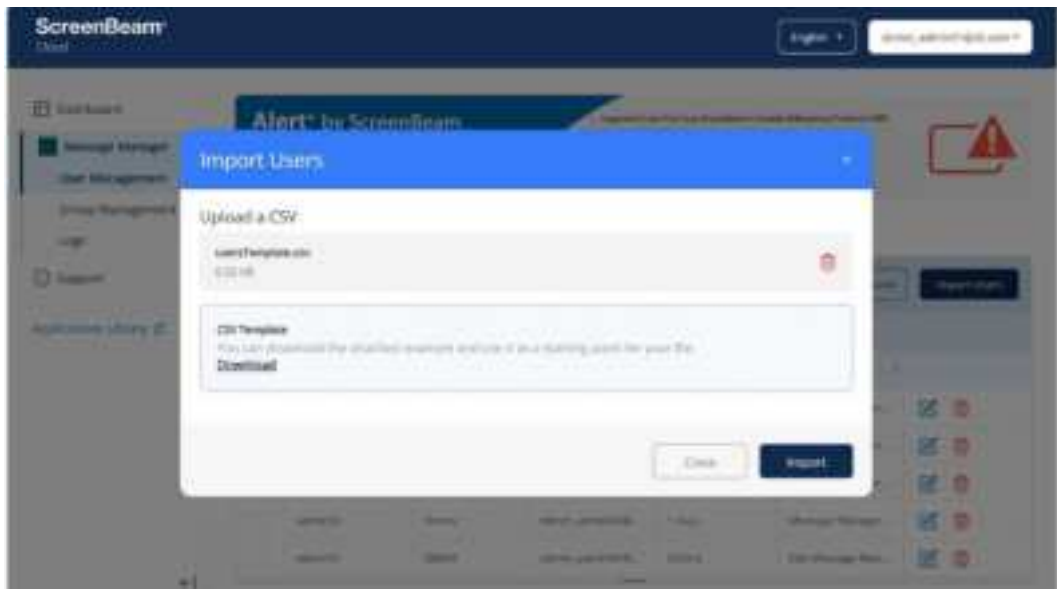
## 4.3 Creating SBMM Front Desk Users

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

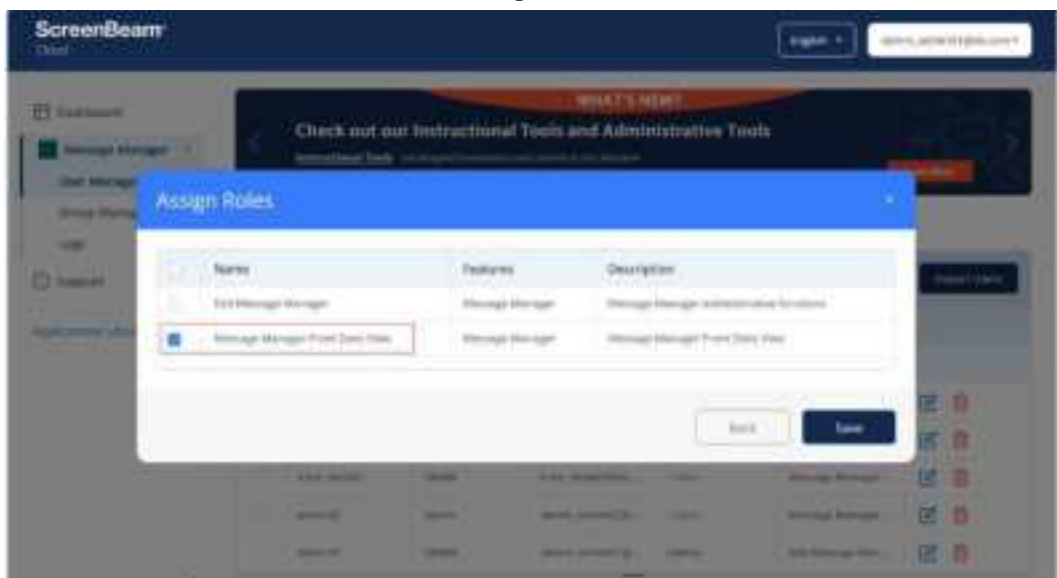
1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](https://cloud.screenbeam.com)) with an SBMM Admin account.
2. Click on **Add User** or **Import User** on the User Management page.
  - **Add User** allows you to add a user one at a time. Enter a user's first name, last name, phone number, and Email 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.

A screenshot of the ScreenBeam Cloud web interface. The 'Add User' modal window is open, displaying a form with the following fields: 'First Name', 'Last Name', 'Phone' (with a country code dropdown), and 'Email'. At the bottom of the form are 'Back' and 'Add' buttons. The background shows the 'User Management' page with a sidebar menu containing 'Dashboard', 'Message Manager', 'User Management', 'Group Management', 'Help', 'Support', and 'ScreenBeam Cloud'.

- **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**.



3. 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**.



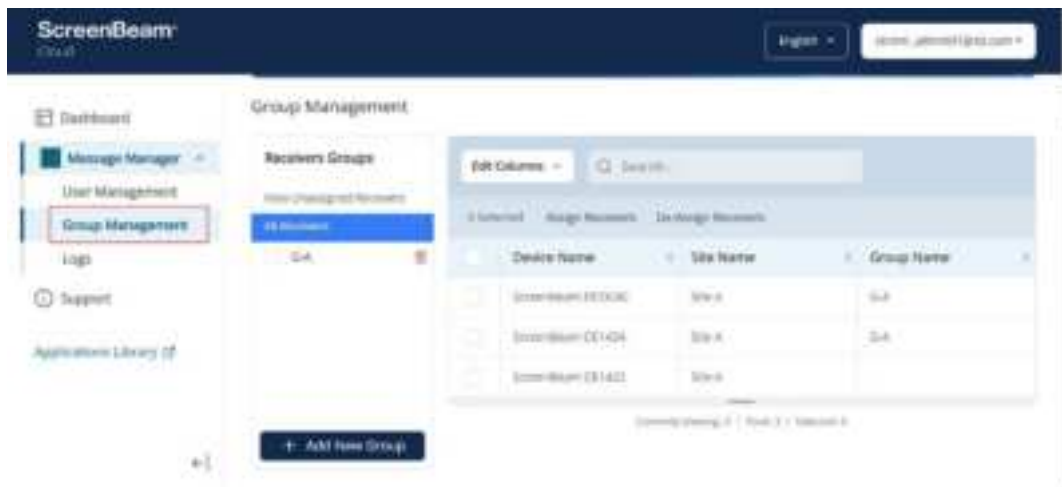
## Part V Setting up Receiver Groups

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.

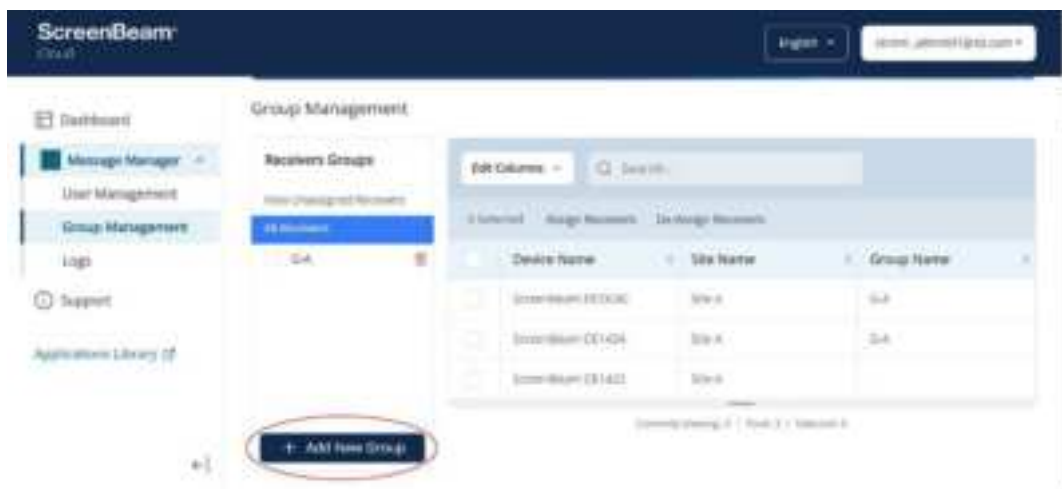
### 5.1 Creating a New Group

To set up a receiver group, follow this procedure:

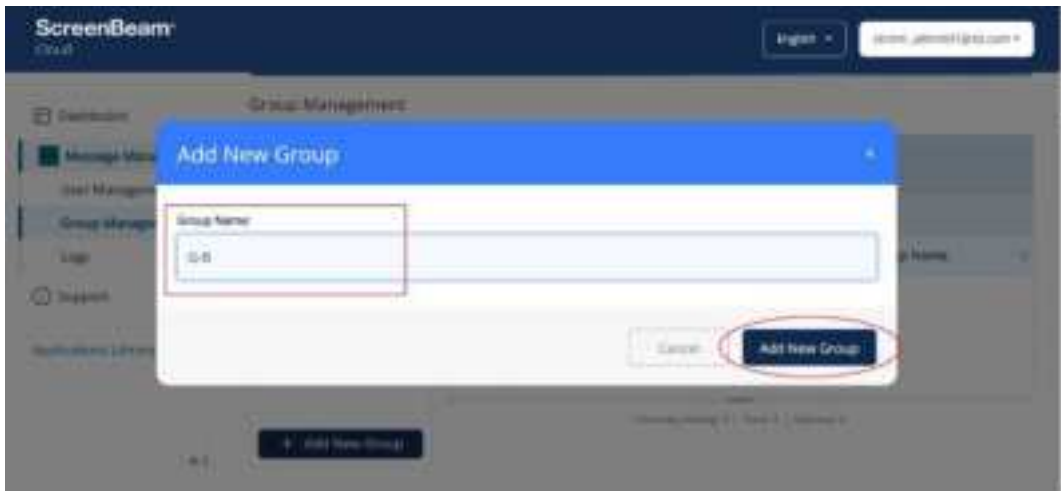
1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](https://cloud.screenbeam.com)) with an SBMM Admin account.
2. Select **Message Manager** > **Group Management** in the left menu.



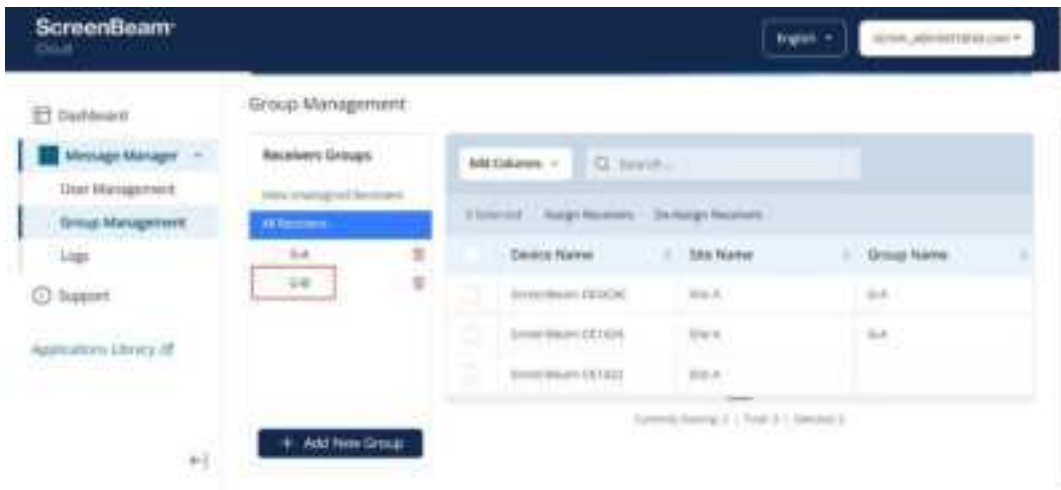
3. Click **Add New Group** in the **Group Management** pane.



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



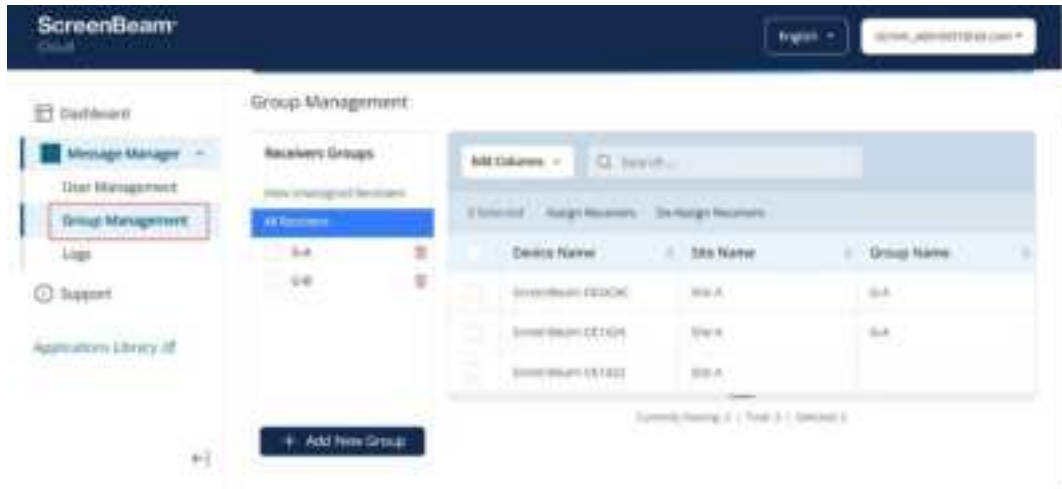
5. A new group will be added



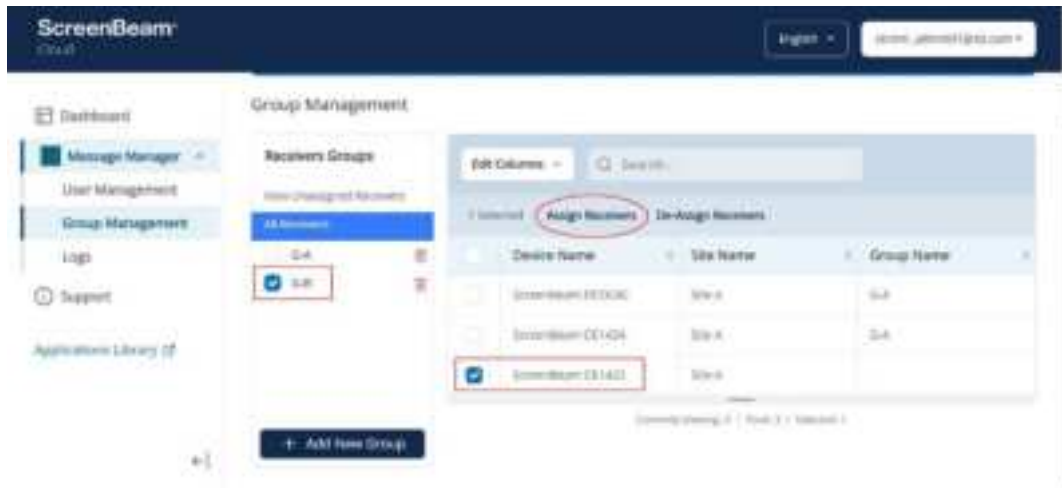
## 5.2 Assigning Receivers to a Group

To assign receivers to a group, follow this procedure:

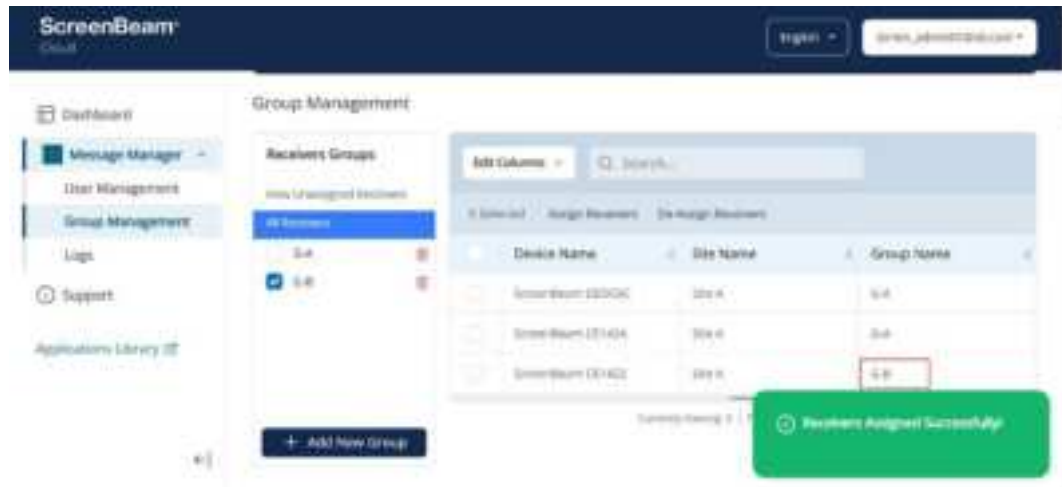
1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](https://cloud.screenbeam.com)) with an SBMM Admin account.
2. Select **Message Manager** > **Group Management** in the left menu.



3. 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:

1. Sign into ScreenBeam Cloud ([cloud.screenbeam.com](http://cloud.screenbeam.com)) with an SBMM Front Desk account.
2. 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.

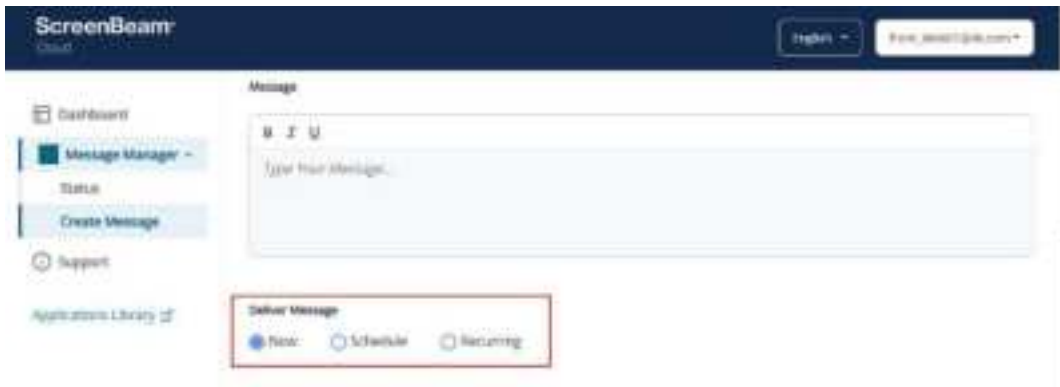
The screenshot shows the 'Create Message' form in the ScreenBeam Cloud interface. The 'Select Message Style' section has three radio buttons: 'Ticker' (selected), 'Half-Screen', and 'Full-Screen'. A red arrow points to the 'Ticker' button. Below this, the 'Number of Rotations (1-10)' field is highlighted with a red box and contains the number '1'. The left sidebar shows navigation links: Dashboard, Message Manager (selected), Status, Create Message, and Support. The top header includes the ScreenBeam logo, a 'Logout' button, and a user profile icon.

The screenshot shows the 'Create Message' form in the ScreenBeam Cloud interface. The 'Select Message Style' section has three radio buttons: 'Ticker', 'Half-Screen', and 'Full-Screen' (selected). A red arrow points to the 'Full-Screen' button. Below this, the 'Select Display Duration (1-60 minutes)' field is highlighted with a red box and contains the number '1'. The left sidebar and top header are identical to the previous screenshot.

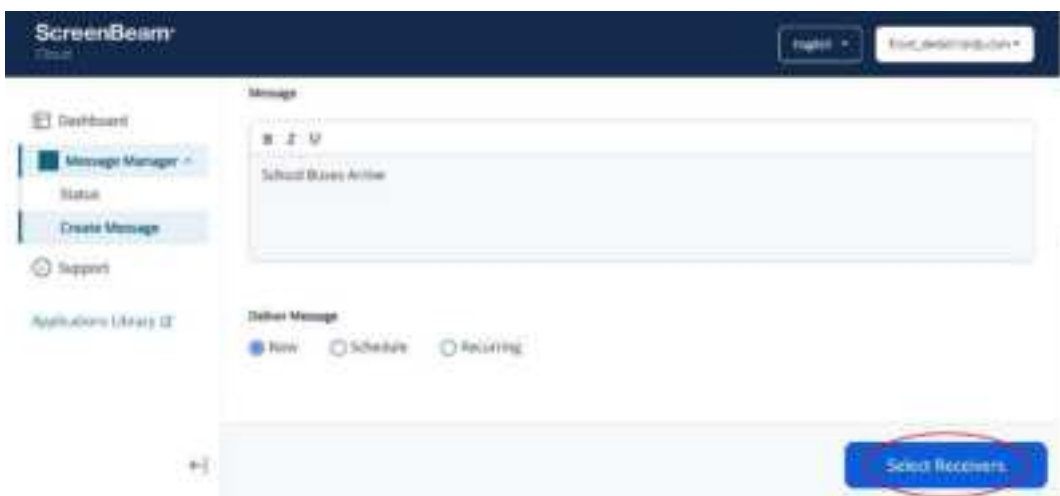
- Type a title for your message in the **Title** box and type the contents of your message in the **Message** box.

The screenshot shows the 'Create Message' form in the ScreenBeam Cloud interface. The 'Title' field is highlighted with a red box and contains the placeholder text 'Type Your Title'. Below it, the 'Message' field is highlighted with a red box and contains the placeholder text 'Type Your Message...'. The left sidebar and top header are identical to the previous screenshots.

- 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.



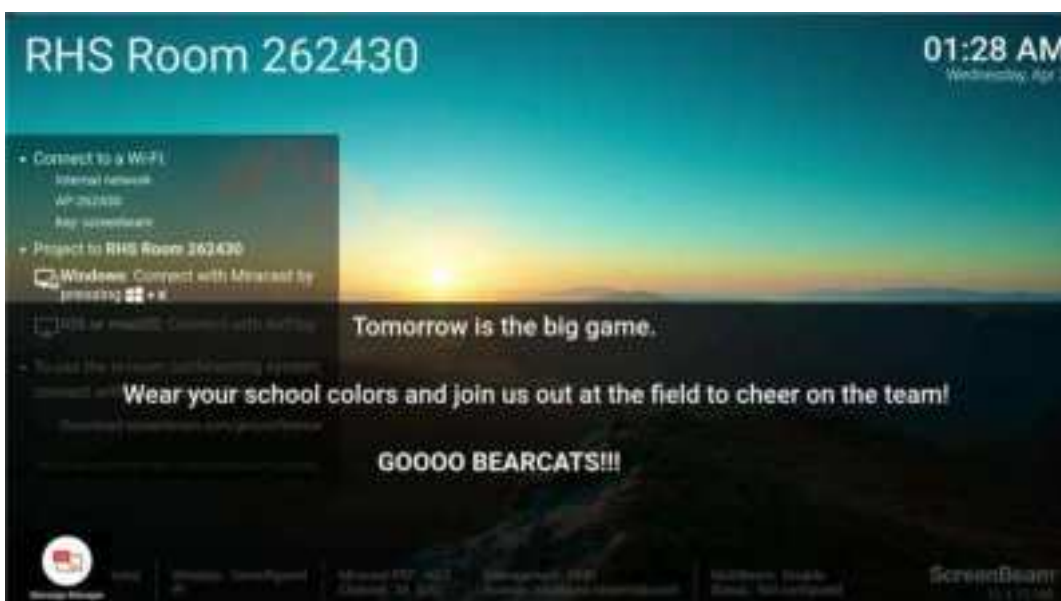
5. In the **Select Receivers** page, click the Expand/Collapse button to show the receivers of a group and then select the receiver(s) you want, or select a group of receivers by checking the group's checkbox.



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 ([cloud.screenbeam.com](https://cloud.screenbeam.com)) 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 ([cloud.screenbeam.com](https://cloud.screenbeam.com)) 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.

