BroadSign

BroadSign Creator

Local Operator/ Local Administrator Manual

Revision 2.6.3

May 2017

Table of Contents

Getting Started

BroadSign Creator requires a valid Local Operator or Local Administrator user provided by the System Administrator. This login information will be provided to you by email.

Supported Browsers

BroadSign Creator officially supports the following browsers:

- Internet Explorer 8, 9, 10 and 11
- Firefox 3.6 and above (Windows only)
- Google Chrome

To ensure you get the best Creator experience possible, always use a supported browser.

Logging In

The Login screen for Creator prompts the user to provide two credentials:

- Email address
- Password

The email address should be the one provided in the request for the user to be created. The associated password should have been sent to the same email address.

Forgotten Password

If a password is forgotten, a link is provided on the login screen that will initiate the process of resetting your password by sending a password reset link via email to the given email address. Clicking on the link will take you to a page where you can reset your password. For security reasons, the password reset link is only active for one hour after the request.

The Home Page

When logging into the Creator the Home page is initially displayed to give quick access to common tasks and an overview of any messages awaiting approval or active emergency messages on the network. It can be accessed at any time after login by clicking the Logo on the top left of the Creator. Links are divided into three sections.

Planning allows quick access to view existing loops and to add new loops

Content allows quick access to existing libraries of content, to upload new content or to create a template for your users to access later.

The dashboard provides information on active emergency messages, messages awaiting approval and the current use of disk quota for the domain.

Depending on your access not all sections of the home page will be available. The home page is optional and may not have been enabled on your domain.
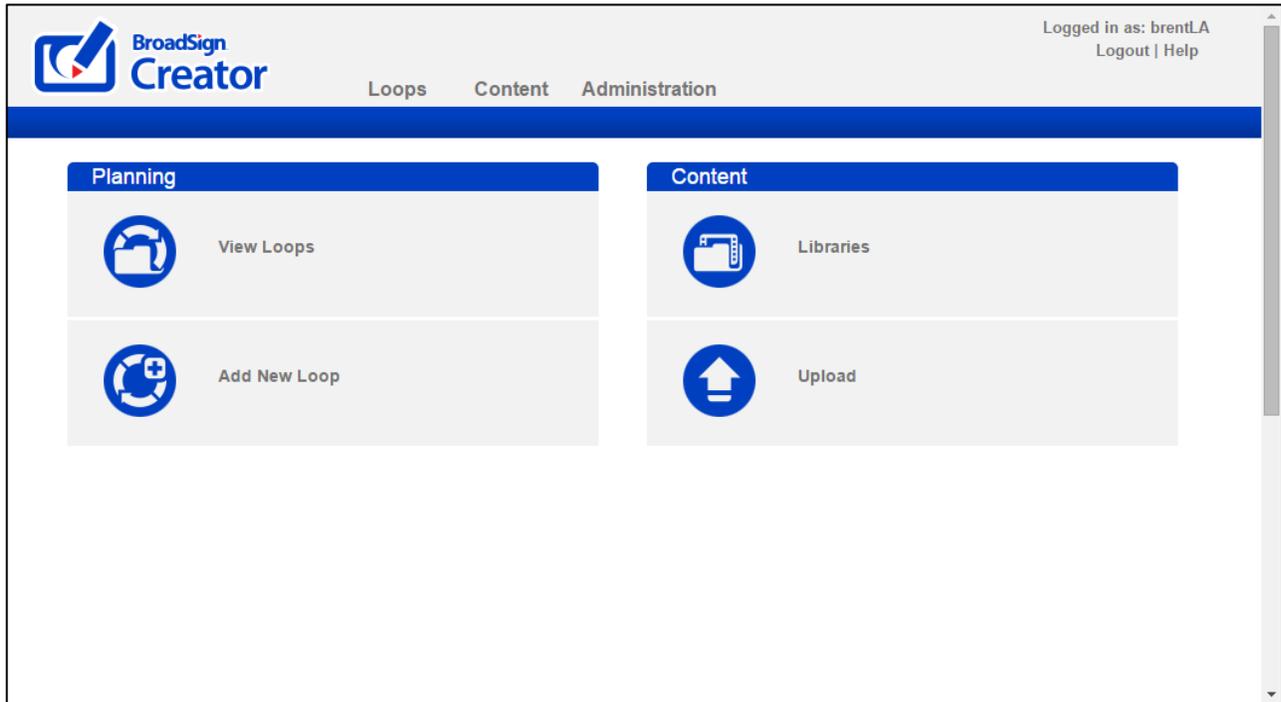
Interface Elements

Upon logging in, the interface presented is divided into five main sections:

- The Header
- The Navigation Bar
- The Sidebar
- The Main Window
- The Pagination Bar
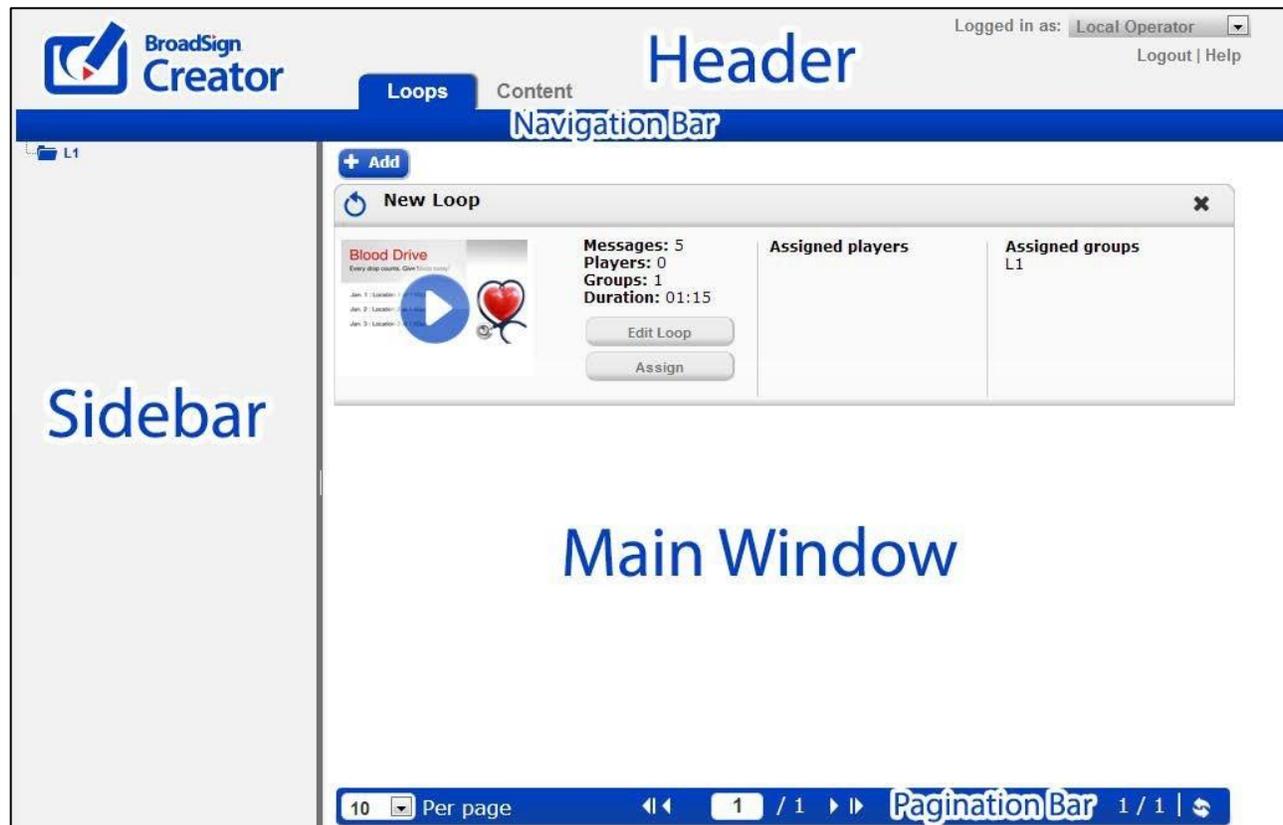
Header

The Header contains a logo, the application name, the name of the user currently logged in and links to log out of the system and access the help files. If additional languages are installed on your domain, you can select your preferred language from the drop-down that will appear in the top-right section of the header. Your preferred language setting will be retained.

Navigation Bar

The Navigation Bar lists the main sections available to you based on your user's permissions. Each item is clickable and will display the respective information for that section. Refer to each tab's respective documentation for more details.

Sidebar

The sidebar is the area where the group hierarchy is presented if you are a user with access to multiple groups. When editing a loop's contents, the sidebar displays all the messages in that loop, along with options for adding and reordering messages.

Main Window

The Main Window is the primary area where information is displayed such as loops, resources, feeds, etc.

Pagination Bar

The pagination bar allows for navigation between multiple pages of items. You can change the number of resources to display on one page.

Action Bar

The Action Bar will appear at the bottom of the page while editing loops. It allows quick access to preview the loop, view the master loop in the case of sub-loops, the zoom level for program view and the date filter for expanded view. Different actions will be available depending on the context of the current screen.

Loops

The Loops section is the primary interface that allows you to add messages and videos, re-order your loops and assign players to Loops.

Interface
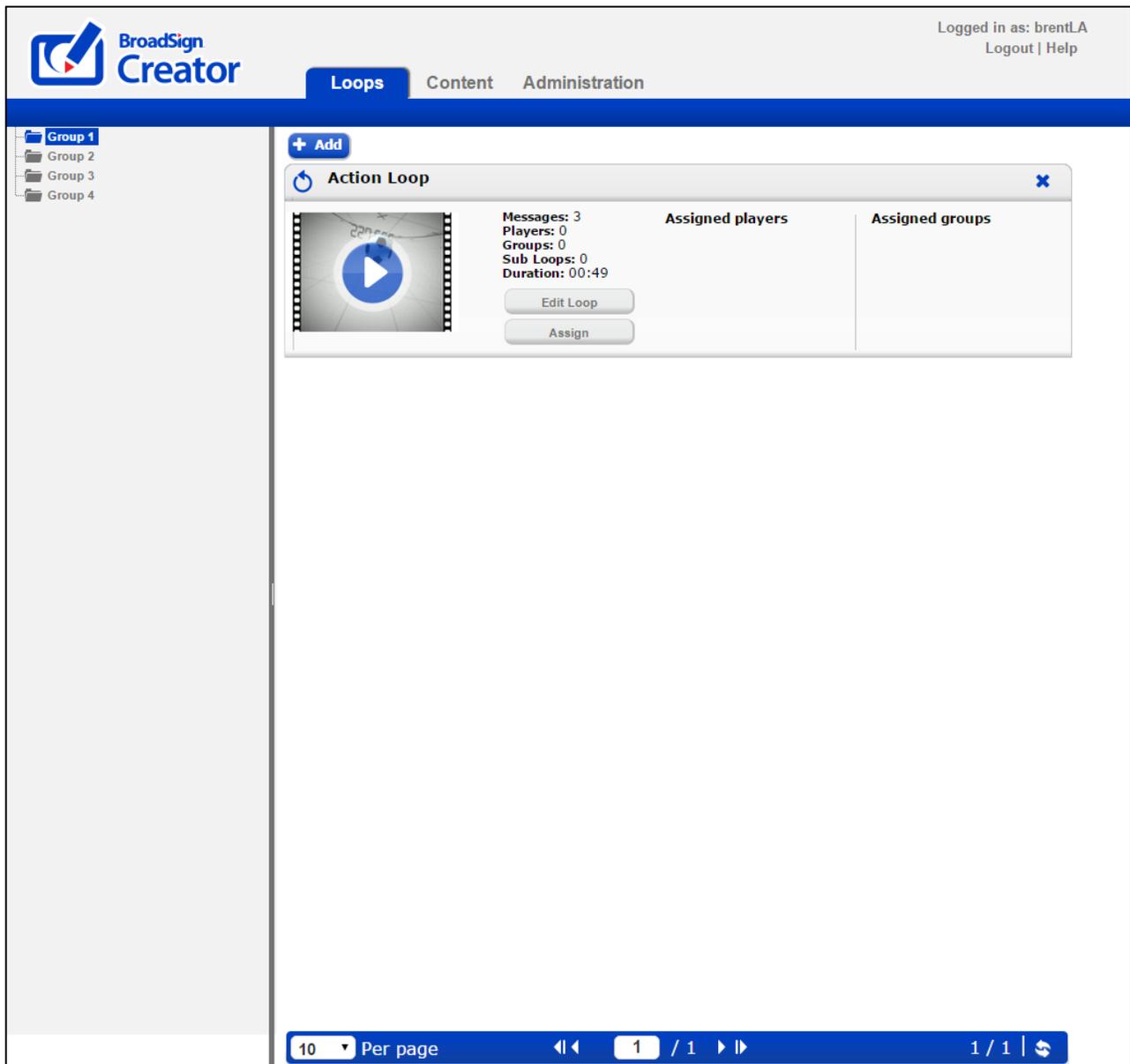
Here you can manipulate your message loops and assign players to loops.

All your message loops are presented on this page. Clicking the play button will allow you to preview the message loop. Clicking "Edit Loop" will allow you to change the loop's contents. Clicking "Assign" will allow you to assign players and/or groups to this loop.

Assigning Players to Loops

In order for a player to start to display the loop's content on-screen, the player must be assigned to loop. To do this, simply click the "Assign" button next to the loop and select the player(s) from the hierarchy. The player will now appear in the "Assigned Players" column.

> **Note:** Restricted Local Operators are unable to assign players to loops.

Assigning Groups to Loops

Your digital signage network operator may have created groups for you to simplify player management. A group is simply a collection of players. Groups are assigned to loops in the same way as players, thus allowing you manipulate several players at once.

Preview

You can view the complete message loop for a Player by clicking on the preview icon image. Previewing a player will open a new window and show each message that the player will display in full size. You can cycle between the messages by using the navigation buttons at the top of the page.

> **Note:** Due to differences between the browser you use to preview the Player and the browser installed on the Player that will display the messages, messages in preview mode may not appear exactly as they will on-screen. Videos are previewed in low resolution but will appear in full resolution on the Player.

Viewing and Editing a Loop

By clicking the "Edit Loop" button next to a loop, you can view and manipulate the messages within it using the loop editor. The loop can be viewed in multiple ways and can be switched between using the Manage Loop menu in the sidebar.

> **Note:** Restricted Local Operators are unable to add or delete subloops or loops.

Rename

A Loop can be renamed by clicking the Rename button in the sidebar and editing the original name to the new name.

Add Message

Clicking on a message in the sidebar will allow you to edit it. The Rename button allows you to rename your entire loop. The "Add message" button allows you to choose from multiple options:

- **From content library**: Select existing content from your library
- **Upload content**: Upload new content directly from your computer
- **From a template**: Create a message based on an existing template
- **Copy from another loop**: Copy existing messages from another loop
- **Add a subloop**: Add a loop of content to an existing loop

Manage Loop

The **"Expanded view"** appears as below and shows the loop in an ordered sidebar on the left of the screen. It can be scrolled up or down and messages can be dragged and dropped to reorder them. Clicking on any message in the sidebar will bring up the editor for the message on the right.
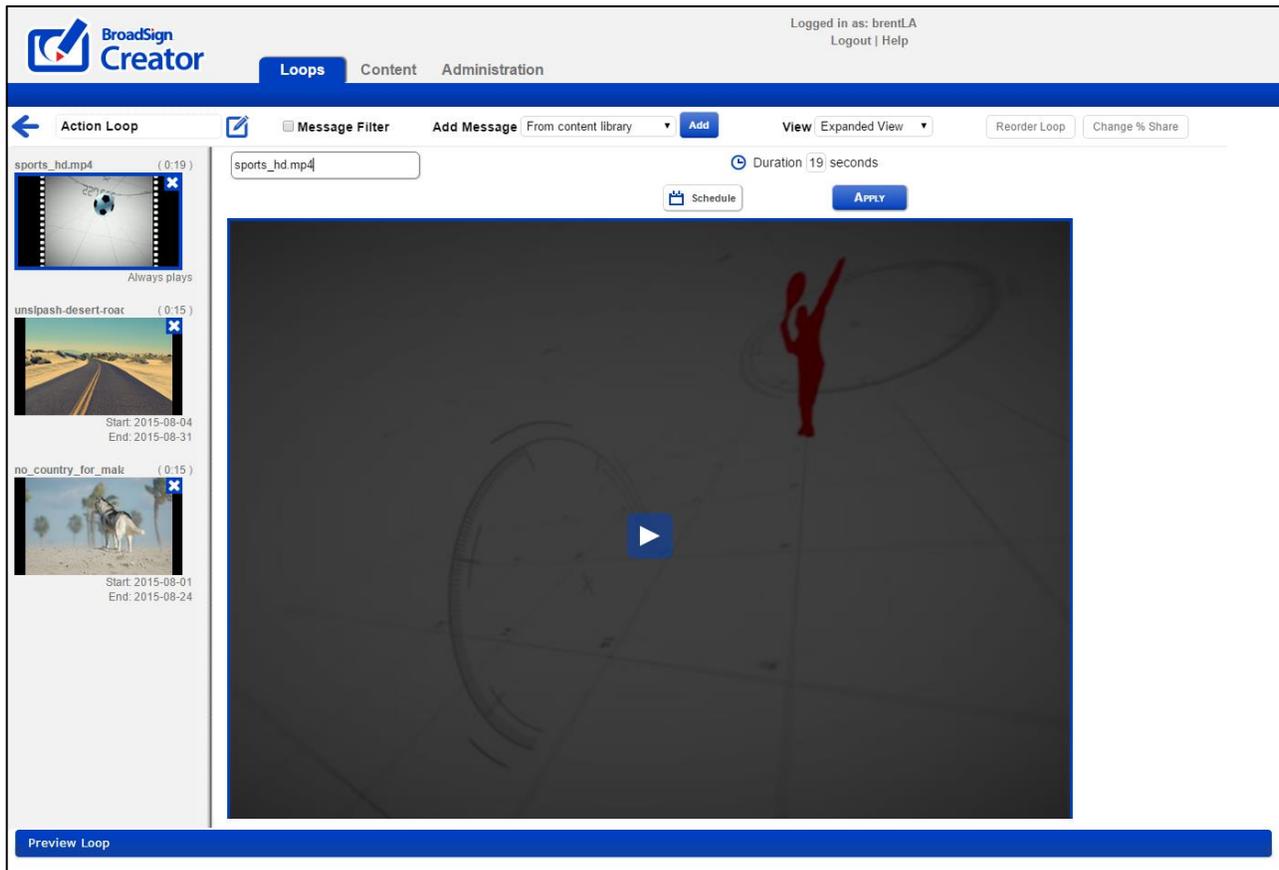
The **"Program View"** appears as below and allows easy reference for loops that have messages with more complicated schedules. Messages will appear in the Program View as of the day that you create them.
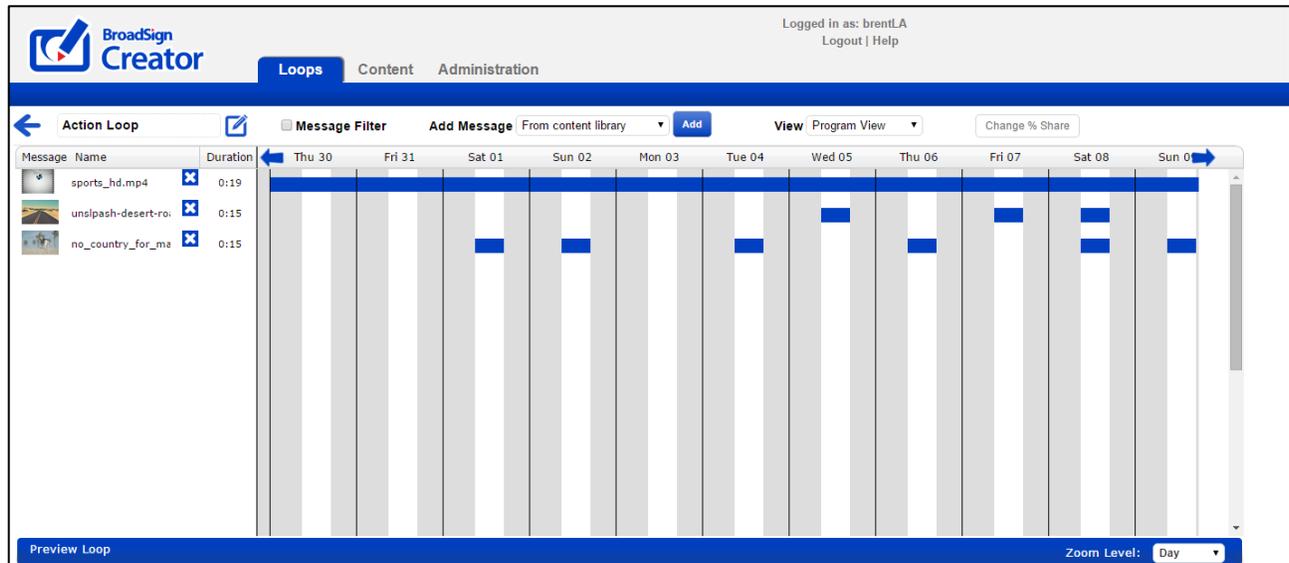
The **"Change % Share"** allows you to assign specific portions of the loop to specific messages or subloops within the playlist. This can be useful if you want certain messages to play at a higher frequency than others.

The **"Reorder Loop"** option allows easier reordering of the loop when the number of messages becomes impractical for the sidebar only.

Deleting a Message or Video

You can delete a message at any time by clicking the X icon displayed next to the messages.

Message Filter

Each Loop by default contains all of the messages for the assigned players for all date ranges. In order to view a specific date range, the view can be filtered using the Message Filter. The Message filter is accessible from the action bar in the Expanded View and Program View.
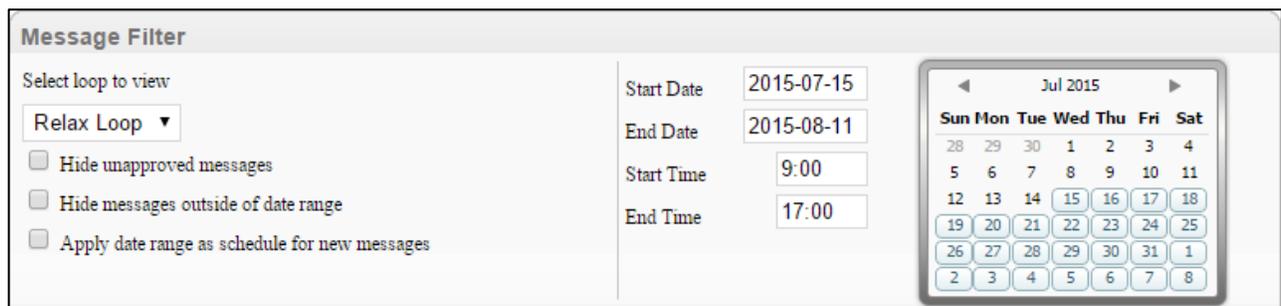
From the message filter, it is possible to switch the loop that you are currently viewing. It is also possible to hide unapproved messages from view and messages outside of the given date range in the calendar. With this approach, it is possible for example to manage a "January playlist" and a "February playlist" within the one player loop.

The option to "Apply date range as schedule for new messages" will automatically add any date settings to new messages. In this fashion when adding a new message it is possible to ensure that it is only added to the current date range.

The calendar widget on the right is also interactive. Users can select the start and end date by clicking on the calendar or the week number (if activated on the domain).

Master Loop View

If activated on the user account, it is possible to view the master loop from the top level, down to the subloop level.

Since sub-loops can be nested in multiple loops when a user selects the option they will need to choose which master loop they wish to view from the available list. If a sub-loop is only in one master loop the user will be provided with that master view by default.

In order for the option to be visible, the user must have the correct privileges and the master loop must have players assigned. If any of these requirements are not met the user will not be able to see the View Master option in their action bar.

The Master Loop View will show the loop horizontally and will display the contents of each sub-loop vertically. This allows sub-loop users the ability to see what else will be playing in the Creator loop without giving them access to edit or change other users content.
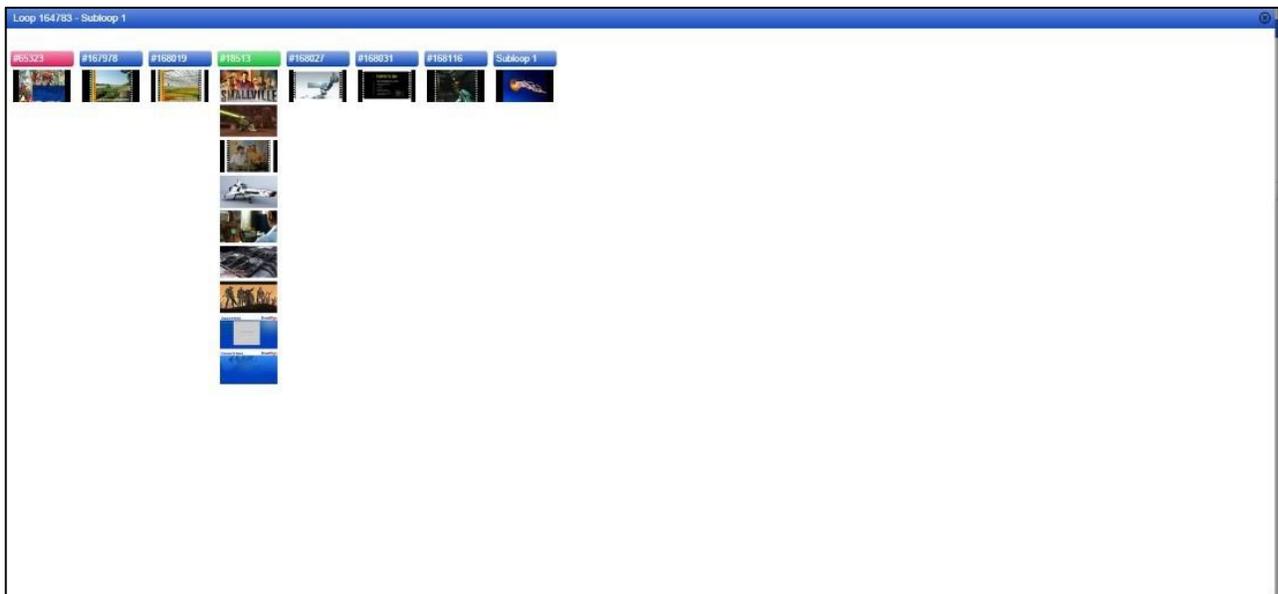
Messages

The message editor allows you to create and edit messages using text, image, flash and video elements.

Message Editor

You can summon the message editor by clicking on an existing message in a loop in order to edit it. The message editor is comprised of the main message window and a message toolbar.

> **Note:** *Restricted Local Operators are unable to delete messages created by user IDs other than their own.*

Message Window

The message window is the large area beneath the toolbar to the right of the sidebar. This area allows you to click on various layers to resize them, move them and delete them.

Message Toolbar

The toolbar presents the controls available for editing messages. Not all controls are available for all message types.
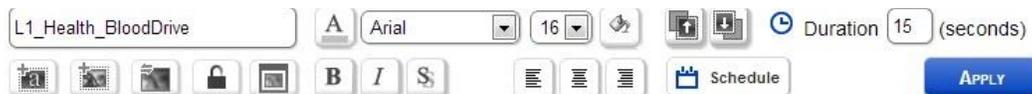
The top row of controls (from left to right) are:

Message name: Messages can be named arbitrarily.

Text Color: While a text layer is selected in the message window, this control will allow you to change the text foreground color and opacity.

Text Font: While a text layer is selected in the message window, this control will allow you to change the text's font.

Text Size: While a text layer is selected in the message window, this control will allow you to change the size of the text.

Text Background Color: While a text layer is selected in the message window, this control will allow you to change the background color of the text layer.

Bring layer forward: While a non-video layer is selected in the message window, this control will allow you move the layer "forward," one layer at a time, so that it is not overlapped by other layers.

Push layer backward: While a non-video layer is selected in the message window, this control will allow you move the layer "backward," one layer at a time, so that it does not overlap other layers.

Duration: Here you can specify the duration in seconds that you wish to display the message for. Please note that if the message contains video, the duration is automatically set to the duration of the video and cannot be changed.

The bottom row of controls (from left to right) are:

Add Text: Click this button in order to insert a new text layer. The new text layer will appear on the message with the default text "INSERTED TEXT". You can then move it, resize it and of course, change the text and color.

Add Media: Click this button in order to insert a new media layer. Media layers can be anything that is in your content library (i.e. images, flash or video content). You will be prompted to select an item from your content library to insert.

> *Note:* Only 1 video layer can be added to a message. When it is added, the message duration automatically becomes the video's duration. For playback performance reasons, it is not possible to place other layers on top of video layers.

Swap Background: Click this button in order to change the background of the current message. Only Images or Flash files can be used as backgrounds.

Set Locks: If your domain has been set up with lockable templates, this button will be shown and you will have the ability to lock the properties of a message and its individual components. Properties which are locked cannot be changed by a local operator whose account has been configured to respect message locks.

Bold: While a text layer is selected in the message window, this control will allow you to toggle the bold setting for the text in the layer.

Italic: While a text layer is selected in the message window, this control will allow you to toggle the italic setting for the text in the layer.

Drop Shadow: While a text layer is selected in the message window, this control will allow you to toggle the drop shadow setting for the text in the layer.

Left Align: While a text layer is selected in the message window, this control will allow you to set the text alignment to left.

Center Align: While a text layer is selected in the message window, this control will allow you to set the text alignment to center.

Right Align: While a text layer is selected in the message window, this control will allow you to set the text alignment to right.

Schedule: You can define a custom schedule for this message. More on scheduling below.

Apply: When you are done making changes to a message, you must click apply in order for the changes to be saved.

Message Schedule

You can define a custom playback schedule by clicking the Schedule button in the message toolbar.

By default, messages will always play. To change this behavior, click the "Custom Schedule" radio button. This will enable the schedule controls. You can define a start/end date as well as a start/end time. You can also use the checkboxes below to indicate if the message should only play on certain days of the week.

> **Note:** *A message will play between the defined start and end times on every day that matches the day-of-week mask from the start date to the end date inclusively. Time format is 24h.*

Subloops

Subloops allow a network operator to assign scheduling rights to a third party for a particular slot within the creator loop. This allows many users to make use of a digital screen at once without interfering with each other. To use this feature it must first be enabled on your creator domain, if you do not see sub-loops as an option please contact your account representative.

To make use of sub-loops correctly you must first set up a group with the end user (or users) and provide access to the desired content libraries. The grouping structure is what allows the user to be contained within your configured settings. Each user that will control a different part of the loop should be given their own folder.

Once the groups are set up, adding a sub-loop to the main loop can proceed. Select an existing loop, or add a new regular loop from the loops page.
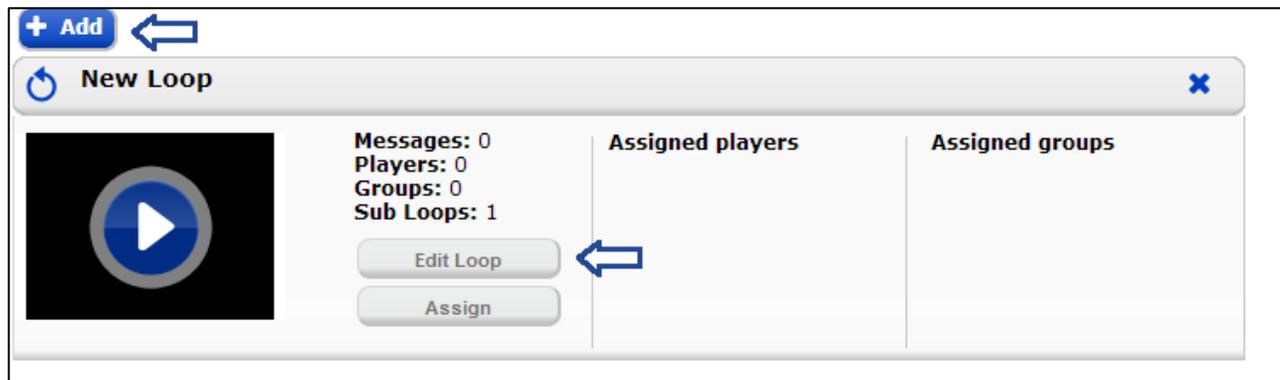
Once in the loop view, hovering above the Add message option will show the "Add Subloop" option. Selecting this will bring up a page that allows you to either select an existing loop or create a new one. The folder that you select the loop from or create a new loop in will decide who has access to that loop. Whichever users have access to the folder you select will be able to edit the sub-loop.
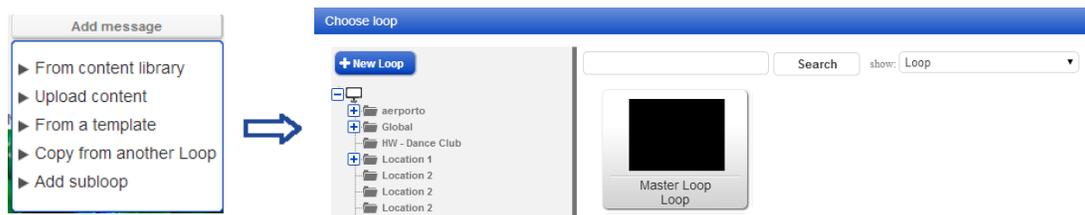
Once a sub-loop is added to the main loop, it can be managed by the users in the same folder as the loop. While they are editing the loop, their view will remain as though they are editing a regular playlist. For the Network operator controlling the main loop, they will be able to see the sub-loops that have been added and also edit them if desired. When looking at a loop containing a sub-loop, an edit button is available to jump into the sub-loop.

Sub-loops can also be color coded for easier reference. To change the color code of a subloop click on the icon on the top left of the sub-loop thumbnail. You can then select from a predefined palette or use the color swatch. The selected color will highlight messages in the Expanded view and the schedule bar color in the Program view.
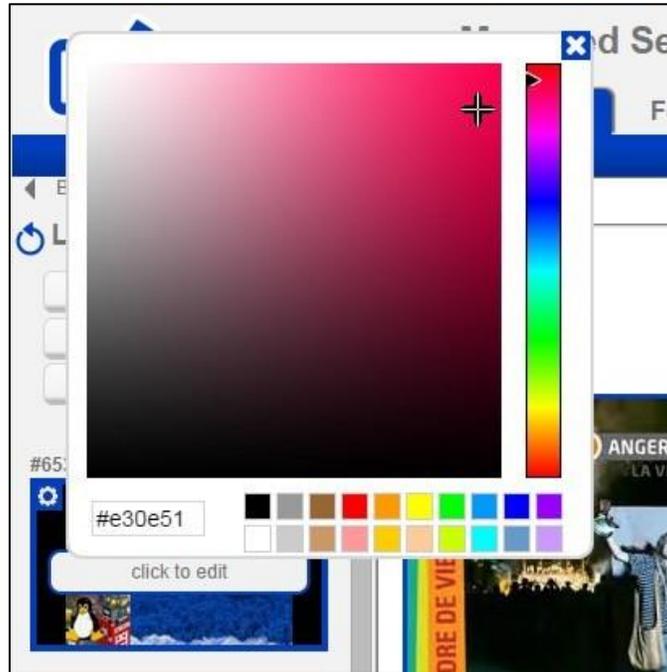
Manage Loop

When messages and sub-loops have been added to a loop, it is possible to then manage playback order and the share of the loop that each message will have.
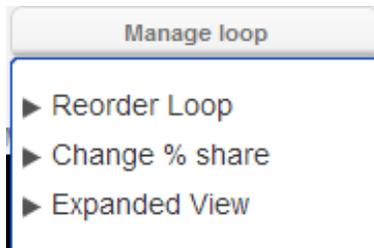

- **Reorder loop** – This brings up a grid view of the messages within the loop so it is possible to reorder the playback.

- **Change % Share** – This option allows you to assign a percentage of the play time to each message so that for example 50% of the loop is given to sub-loop A, 25% given to message B and 25% to sub-loop C.

- **Expanded view** – In order to meet the percentage settings, certain messages may play more often, as with the case above where Subloop A would play twice as much as message B or Sub-loop C. The expanded view allows you to reorder playback if there are multiple copies of one message.

- **Program View –** Detailed schedule view of the loop.

Content

The Content tab is the central repository of your images, flash files and video files.

Content Management Interface Overview

The content tab presents the following interface, in icon view:
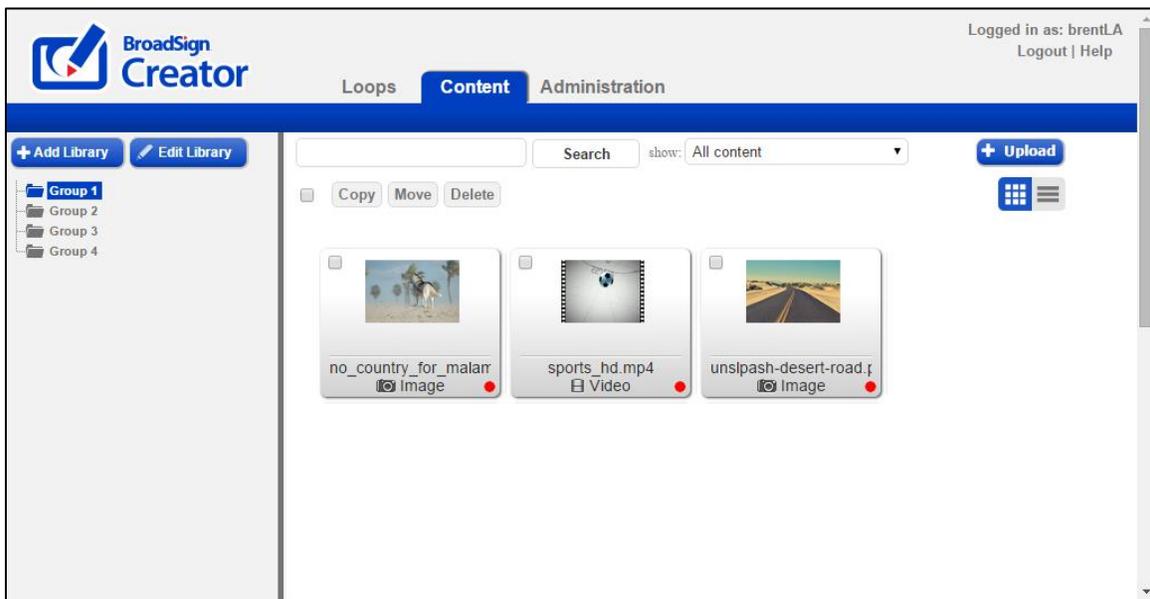


Here is the same page in list view:
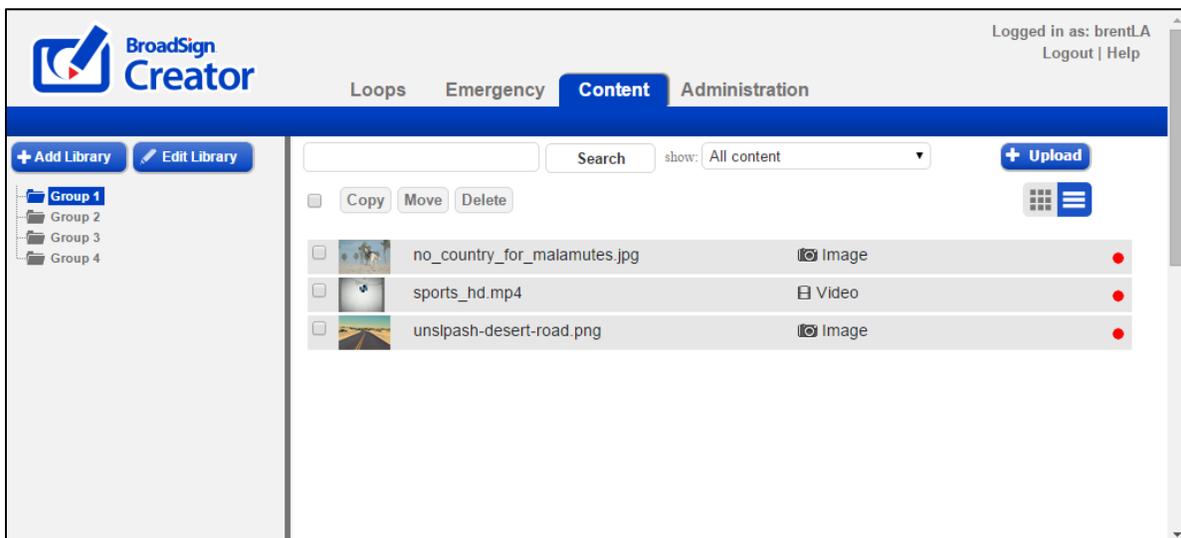
> **Note:** *In Program View or List View, you can select multiple pieces of content and move, copy or delete them.*

In the sidebar, you can navigate through groups and libraries to see the content within them. You can search for content by name in the search box, as well as filter by content type. You can upload new content by clicking the upload button. You can preview content by clicking on it. Hovering over a content item will display it in a larger thumbnail with icons for copying, moving, viewing, deleting and creating templates.

In the sidebar, you can navigate through groups and libraries to see the content within them. You can search for content by name in the search box, as well as filter by content type. You can upload new content by clicking the upload button. You can select all items in a particular group at once, deselect as you want, then copy, move, or delete the selected content.
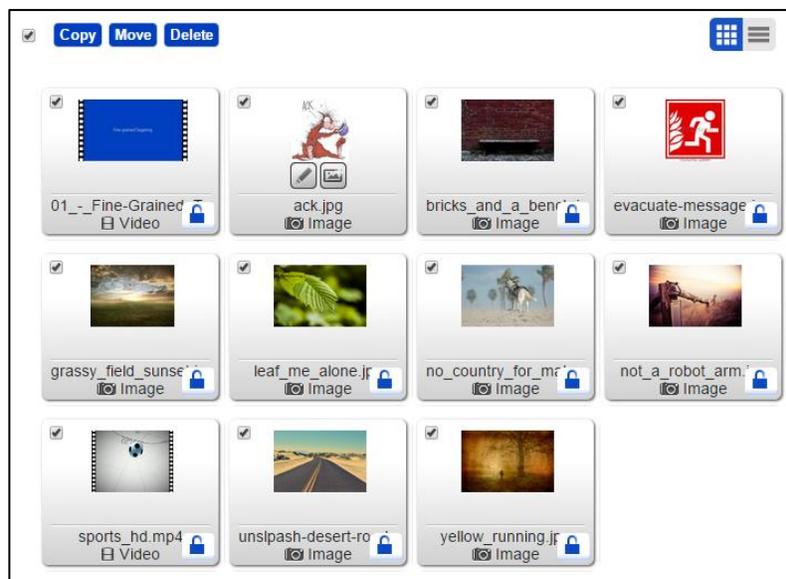
You can preview content by clicking on it.

Hovering over a template will reveal icons for editing that template, and adding a message from it.
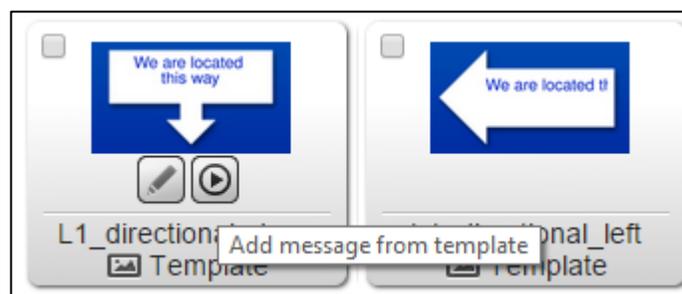
Hovering over a non-template content item will reveal icons for viewing/editing the content, and creating a template from it.
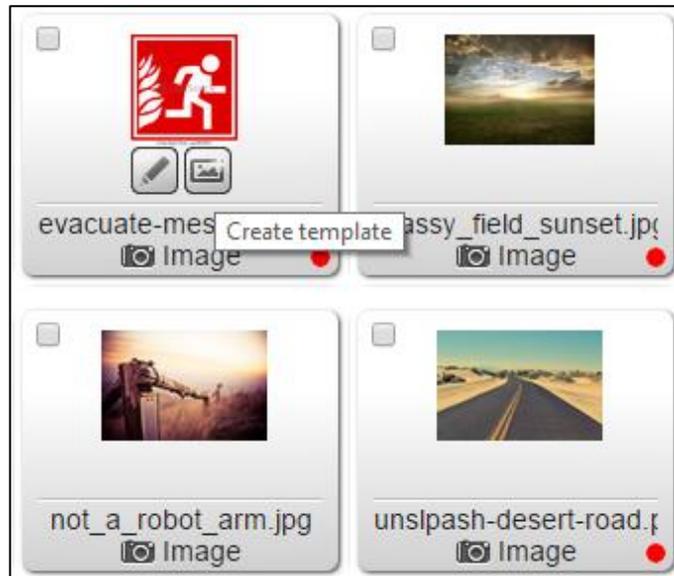
A red dot indicates that a content item is in an active loop. You can, for example, more easily delete or move unused content without affecting active assets. To see the active loops in which an asset is used, click the red dot. You can navigate to a loop with an active asset by clicking on the loop name.
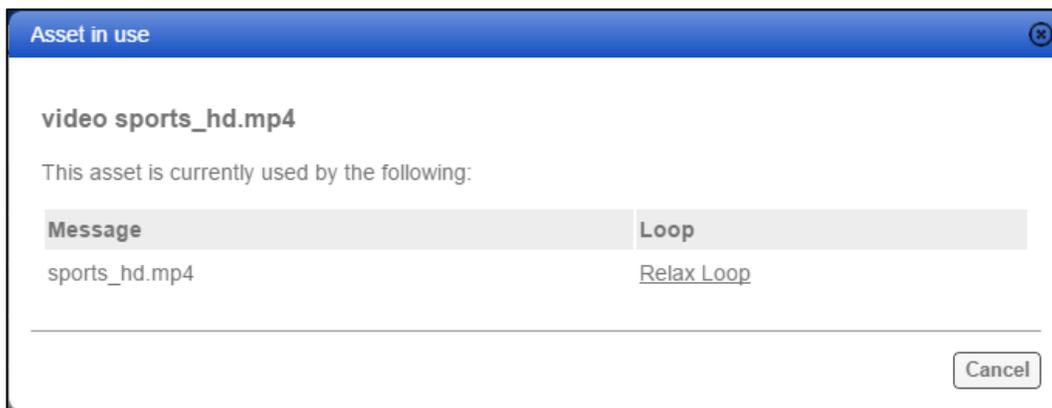
Content Actions

When hovering over a content item, an expanded thumbnail will appear with some additional actions as follows, represented as icons:

View

This action is the default action when clicking on a thumbnail. It shows a preview of the content in a popup window. In this window, you can also change the content's name.

Edit

This action permits the user to change images, videos or templates.

Create template

This action will use the selected content as a template background and start the template creation process. This action is not available for videos or templates.

Add message from template

This action will add a user to create a new message from a template, and select its loop.

Libraries

Libraries are a way to group together similar content. For example, all Christmas content (backgrounds, templates, videos, etc.) can be organized into a library. Your network operator may have created some stock content libraries to share with you already. You can also create your own libraries by clicking the "Add Library" button in the sidebar, and you can remove empty libraries by using the "Delete Library" button.

> **Note:** *Restricted Local Operators are unable to add or edit libraries.*

![BroadSign]

Emergency Messages

> *This section applies to Local Administrators only. Local Operators are unable to access the Emergency Message tab.*

The Emergency tab is used to schedule emergency messages that will appear within seconds on your player.

Emergency Message Interface

The emergency messages section presents the following interface:
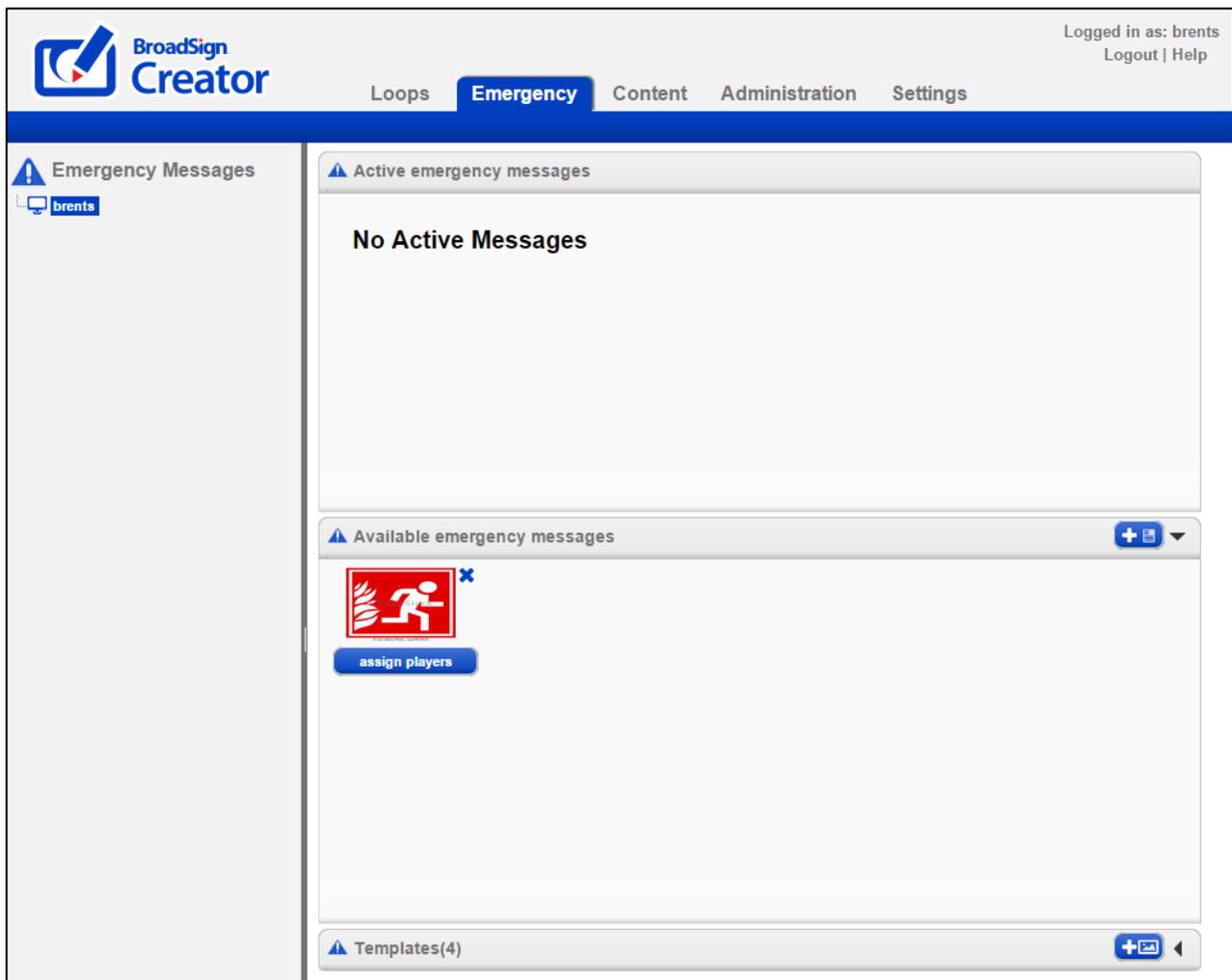
In this interface, you can define new emergency templates, create and edit emergency messages and activate/deactivate emergency messages quickly.

![BroadSign]

Emergency Message Templates

Emergency message templates are used to pre-build certain types of emergency messages so that they can be disseminated quickly. For example, creating an emergency message template for a fire, flood or earthquake-type emergency.

To add an emergency message template, click on the "Add New Template" button on the top right of the Templates section. Select and appropriate background (image or flash) and give it a suitable name.

Building an Emergency Message

An emergency message is a specific instance of an emergency template. For example, the template might be a generic "Fire" background, whereas numerous messages are created using that template ("Fire in Building 1", "Fire in cafeteria", etc.). Once you have created a template, you can then create an emergency message by clicking on the "Create new message" button at the top right of the "Available Emergency Messages" section. This will summon the message editor where you can add text, images, and Flash.

Tip: It is a good idea to pre-build a series of standard emergency messages so that they can be activated quickly without having to type any text or upload images.

Note: You cannot add videos to emergency messages. This is because they would take too long to download. You can, however, use flash as a background or media layer in an emergency message.

When you click on Create Message, in the top left corner, the "Show all templates" option displays as selected, by default. If you deselect this feature, a tree listing all of the groups appears. You can use this feature to organize your templates by group.
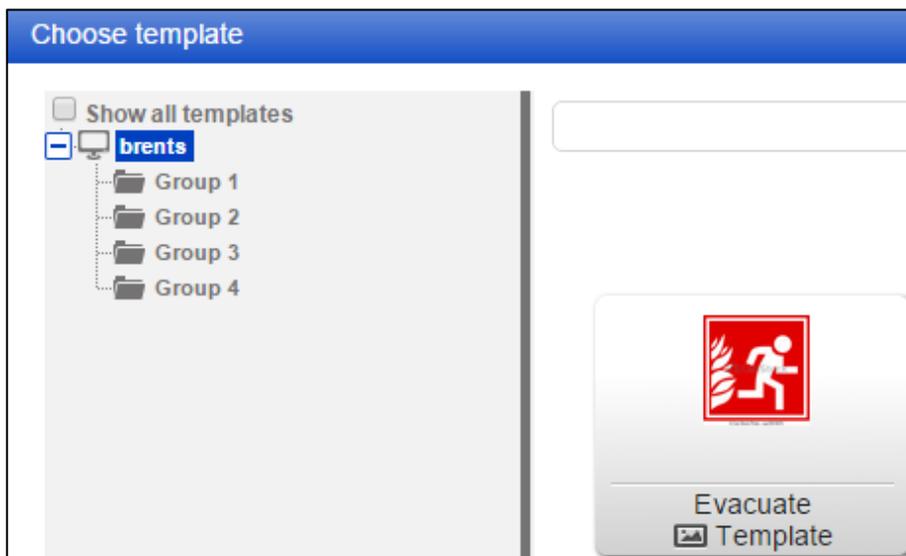
Activating an Emergency Message

To activate an emergency message, click on the "Assign Players" button beneath it. You will then be allowed to choose which Players the emergency message should be displayed on. Once you click Apply, the emergency message is active and the assigned players will display it within a few seconds. You can deactivate an active emergency message by clicking the "Deactivate" button beside it.

An active emergency message can be edited by clicking on it directly, which will summon the message editor. This is a convenient way to provide instant status updates in case of an active emergency.

Managing Emergency Message Access

Only network operators and users granted emergency message access can view or schedule emergency messages and templates. While network operators have access to all messages and content on the domain, local administrators and local users access are determined by their group membership.

Local users and administrators can only view and schedule messages that belong to groups above or below them in the hierarchy, but not to messages that belong to other branches of the network.

Groups

The Group is the cornerstone of BroadSign Creator's access control structure. As its name implies, it groups together the various resources that are managed from Creator and restricts which users have access to which resources.

Overview

A Group is an organizational unit that associates various resources with one another. The resources that can be grouped together are:

- Users
- Players
- Libraries
- Templates
- Other Groups

When a new group is created, it is empty and no resources are associated with it. Groups are used primarily to restrict what Local Operators can see and do.

Groups are optional. If no groups are defined, all resources are implicitly available to all users.

Creating a Group

To add a new Group, click the "Administration" tab in the main menu and then hover over the "Add+" button, and select "Group" from the dropdown.

You will then be prompted to supply a name for the group, select the destination (if it is a sub-group) and optionally specify an upload limit to restrict the size of uploads for users in that group.

Adding Resources to a Group

Users, Players, Libraries and Templates can all be added to a group. To add a resource to a group, click on the "Administration" tab and use the sidebar's group tree to navigate to the desired group. The Main Window will display the resources already in that group. Hover over the "Add+" button, and select the type of resource you would like to add from the dropdown. Fill in the necessary fields and the resource will be created in that group.

Moving Resources between groups

To move a resource from one group to another, click on the "Administration" tab and use the sidebar's group tree to navigate to the source group. The Main Window will display the resources already in that group. Click on the resource you would like to move and click "Edit". In the dialog box that appears, you can move the resource by changing the "Belongs To" field.

Users

In order to use BroadSign Creator, each client will require a User with the Local Operator Role that is assigned to a group. That User will be able to build messages with the Libraries and Templates that are assigned to his group as well as any libraries shared with his group or parent group. That User will also be able to assign messages to Players that are associated with his group or any child groups. In other words, a User can be granted access to content from outside his groups but can only control the Players in their group and all sub-groups.

Templates

Templates represent the background images and default text and image layers that are avail-able for Local Operators to use when building messages. For more information, please consult the Templates section.

Libraries

Libraries are a set of images available to the Local Operator that can be used as decorations, logos, products or any other desired purpose. These images are superimposed over the background image from the Template. For more information, please consult the Libraries section.

> **Note:** *Restricted Local Operators are unable to add or edit libraries.*

Sub-Groups

Sub-Groups can be added to other groups. These sub-groups allow for a hierarchy of Players to be built since each group has scheduling privileges to all Players in its own group and all Players in sub-groups further down the chain.

Example

Consider the following group structure:

- New York City
- Manhattan
- Broadway
- Times Square

- Brooklyn

The "New York City" Group has "Manhattan" and "Brooklyn" as sub-groups. "Manhattan" has "Broadway" and "Times Square" as sub-groups.

> **Note:** *Restricted Local Operators are unable to add or edit libraries.*

- Local Operators in the "Broadway" group are able to schedule only to Players in the "Broadway" Group (but not "Times Square"). Messages can be built using all the Templates and Libraries shared with the "New York City", "Manhattan" and "Broadway" groups.
- Local Operators in "Manhattan" are able to schedule to Players in "Manhattan". "Broadway" and "Times Square" Players can also be scheduled to as contiguous Player Groups. Messages can be built using all the Templates and Libraries shared with the "New York City" and "Manhattan" groups or found in the Manhattan group and below.
- Local Operators in "New York City" are able to schedule to Players in "New York City". "Manhattan" and "Brooklyn" players can also be scheduled to by assigning loops to those groups. Messages can be built using any content found in New York City and its children.

Users

The User resource controls access credentials and dictates which functions are available based on the User's role.

Access

For Local Administrators, there are two levels of User access: Local Administrator and Local Operator.

Local Operator

The Local Operator manages only the Content, Messages and Loops that are scheduled to their associated Players. Typically, this user role is fulfilled by an unprivileged user who is on-site, such as a store clerk.

Restricted Local Operator

The Restricted Local Operator has the same privileges as a Local Operator, with the following exceptions:
- Unable to add libraries
- Unable to edit libraries
- Unable to add or delete loops
- Unable to add or delete subloops
- Unable to assign players
- Unable to delete messages created by IDs other than their own

At the Network Operator's discretion, you can also prevent a Restricted Local Operator from uploading video and Flash content.

Local Administrator

The Local Administrator user is like a Local Operator, but can also approve messages, create sub-groups and create sub-users. Typically, this user role is fulfilled by a semi-privileged user who is on-site, such as a store manager who can control his own screens, but not the screens of otherstores.

Creating a User

To add a new User, click on "Administration" in the Navigation Bar and navigate to the desired group in the group hierarchy. Hover over the "+ Add" button and select "User" from the drop-down.

Since email addresses are used as a login credential, they must be unique within the system. Duplicate entries will be rejected.

When creating a user, you are asked to supply the following information:

- A Name [required]
- An Email Address, which will also be used as login identification [required]
- A default password [required]
- The Group (or Groups) the User belongs to.
- The User Role (Local Administrator, Local Operator or Restricted Local Operator) [required]
- Whether the user is bound by message locks (on domains which support that feature).
- Whether the user can upload content to locked templates.
- An email notification that will indicate the login URL and credentials.

Editing a User

To edit a user, click on the "Administrator" tab in the navigation bar and navigate to the user's group. Alternatively, you can search for the user using the search function. Click on the edit button to change a user's properties. (Please note, email addresses must remain unique).

Password Change

To change or reset a User's password, type the new password in the Reset Password text box and click Apply.

Respect Message Locks

A user with this flag set will not be able to edit features of messages that have been locked. If this flag is not set, the user will be able to edit any aspect of a message, regardless of whether or not that editing was enabled by the network operator. This option is used to enforce a particular look and feel for templates.

Allow Upload on Locked Templates

A user with this property enabled will be able to add content to locked templates; however, they will be unable to change the template's original content. This feature is useful when a user wants to add a text message to a template, for example. This option is useful when the locked template is used as a guide rather than trying to enforce a look.

Notify User via Email

To send the user an email reminder of their access credentials and login information, check the "Notify User via Email" checkbox and click apply.