

i3CONNECT Cortex manual	2
Getting Started	4
Creating an account	8
Registering your i3CONNECT display	10
Your dashboard and navigating	12
Managing your devices	14
Managing your device groups	18
Firmware management	21
Managing apps	24
Using the Settings app	26
Configurations	30
Action History	35
Managing access to your i3CONNECT display	37
User Management	43
Cortex users	49
Display Users	51
Organizations	56



i3CONNECT Cortex manual



CORTEX

Welcome to i3CONNECT Cortex [↗](#)

Welcome to i3CONNECT Cortex. Our remote device management platform enables support employees and IT administrators to manage and monitor an entire fleet of i3CONNECT Studio displays from anywhere at any time ensuring they will always have full control.

Let's get started!

User guide [↗](#)

 Download this user guide as a pdf

[Getting started](#)

[Managing your devices](#)

[Managing your device groups](#)

[Firmware management](#)

[Managing apps](#)

[Using the Settings app](#)

[Configurations](#)

[Action history](#)

[Managing access to your i3CONNECT displays](#)

[User management](#)

[Organizations](#)

What's new? [↗](#)

Looking for what's new in i3CONNECT CORTEX 3.0? Click [here](#) for an overview.

For i3RDM users [↗](#)

Looking for the old i3RDM documentation? We keep it available for users who need to have a reference to it. You can find the documentation [here](#).

Subscribe to the i3Tech Update newsletter [↗](#)

Want to stay up to date with our newest developments? [Subscribe to our quarterly tech newsletter](#).

Getting Started

Creating an account [🔗](#)

You can easily create an i3CONNECT Cortex account by going to <http://cortex.i3-connect.com> and register online. You can choose the free trial or immediately go for a full license. If you scan your i3CONNECT Studio display to register and you don't have an account yet, it will take you immediately to the registration page.

Free trial [🔗](#)

Want to try a fully featured version of i3CONNECT Cortex for a limited amount of time before taking the jump? Then sign up for our free trial which you can freely use for 3 months until you decide. Click "Create my free account" and sign up with your e-mail or use SSO (Single-sign-on) verification with a Gmail or Microsoft account. Leave your credentials on the second page and continue. Your account is all set and you're ready to start registering your i3CONNECT displays.

Buy your license now [🔗](#)

Of course you can immediately buy a license. The advantages of doing so are:

- No license fee for online registrations
- Three months for free in your first year

Select "Buy my license" and enter the total amount of i3CONNECT displays that you want to register. The price depends on the number of displays and you'll be sent an invoice yearly.

You can always add more displays at a later moment, we calculate the price based on how much time is left until the subscription will renew.

If you decide to buy a license and wish to end it within the year, you'll still be able to use it until the billing year ends.

If you have further questions concerning pricing, please contact our support team at info@i3-technologies.com.



What determines the price of an i3CONNECT Cortex license?

The license fee depends on the **subscription term** and the **number of enrolled devices**.

i3CONNECT Cortex can be bought for a term of **1, 2, 3, 4, 5 or 8 years**.

Price quote

You can always ask for a price quote through your local dealer.

For i3-Technologies dealers, the list of resellers can be found here: [Dealers](#)

For CTOUCH dealers, the list of resellers can be found here: [Distributor and reseller | CTOUCH Global](#)

If you cannot find a dealer in your area, please contact our sales team on info@i3-technologies.com

In order to create your account or make a price quote, we need the following information:

- Company name
- Phone number
- Display information:
 - manufacturer
 - type
- Number of devices you want to register
- License term

Registering your i3CONNECT display [↗](#)

Unlock the full potential of your i3CONNECT displays with i3CONNECT Cortex, our powerful remote display management solution. You can access i3CONNECT Cortex from any device or location, giving you complete control over your fleet of i3CONNECT displays. With i3CONNECT Cortex, you can easily configure, update, and troubleshoot your displays, saving you time and effort. i3CONNECT Cortex also provides advanced features such as user profiles and control over firmware updates.

Getting started with i3CONNECT Cortex is easy. All you need is an i3CONNECT display and your phone to scan the QR code on your i3CONNECT display.

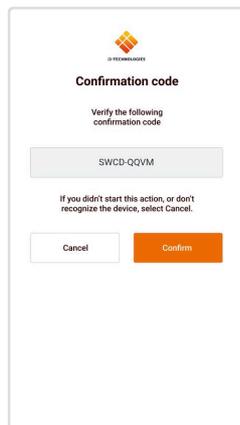
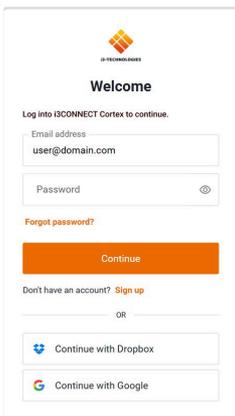
If you don't have an account yet, take advantage of our **free full-featured trial** to test out all of i3CONNECT Cortex's capabilities and see if it's the right fit for you and your organization. See [Creating an account](#) for more info.



How to register? [↗](#)

You'll find the necessary details to register the i3CONNECT display either:

- During the initial **Setup Wizard**, or
- In the **i3CONNECT Cortex Client** app in the App Tray.



Scan the QR code with your mobile phone, or enter the given URI in your browser. You may be required to authenticate to Cortex.

You can sign in using Single Sign on authentication, provided by [Auth0](#) or manually enter your credentials.

When successful, you can validate with the validation code to complete registration.

The Setup Wizard [↗](#)



You can register your device into i3CONNECT Cortex from the Setup Wizard within i3CONNECT Studio, to find out more about the Setup Wizard, see [Setup wizard](#). If the device you wish to register has already completed the setup wizard, you can still register with the following process.

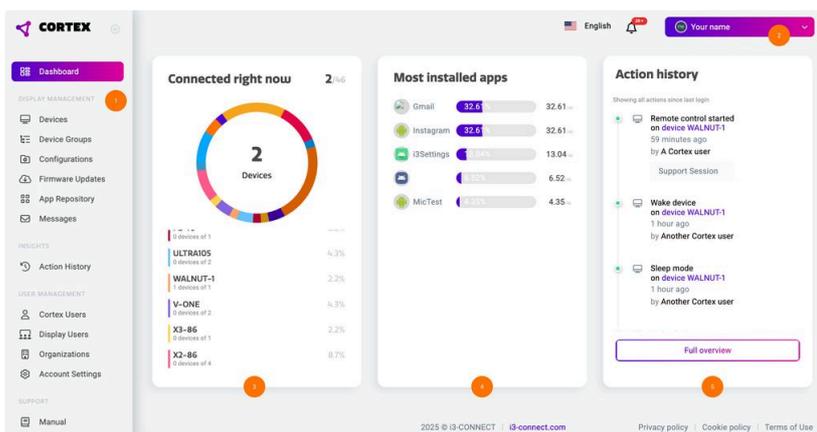
The i3CONNECT Cortex Client app [↗](#)



You can also register through the i3CONNECT Cortex Client app. This client app can be loaded from the **Apps view** in the side menu of i3CONNECT Studio.

For more information, see [Registering to i3CONNECT Cortex](#).

Your account, dashboard and navigating [↗](#)

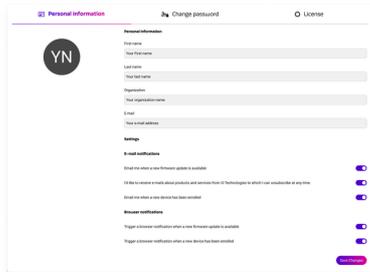


When you open i3CONNECT Cortex, you will land on the main dashboard page. Here, you will find basic information regarding your registered i3CONNECT displays and the navigation.

1. **Main menu:** this menu allows you to navigate i3CONNECT Cortex, see all your displays, apps, user lists etc.
2. **Profile drop down:** this allows you to sign out or switch organization, if activated. See Organizations for more information. Next to the drop down, you can also select your preferred language and review notifications.
3. **Connected right now widget:** this widget shows the displays that are online and connected right now.

4. **Most installed apps widget:** this widget gives a quick overview of the most installed apps on your displays.
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6. **CAIR widget:** If your i3CONNECT display comes with a CAIR module, you may see this displayed at the bottom of your dashboard.

Manage your account [↗](#)



Go to “Your account” from the main menu to manage:

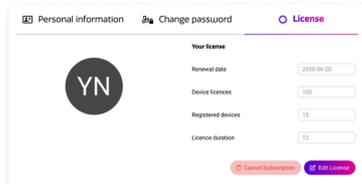
- Personal information and notification settings
- your password. If you signed up using Microsoft or Google, this feature is not available.
- License: manage the available device licenses in your account and/ or cancel your subscription.

Set Notifications [↗](#)

At the bottom of the “**Personal Information**” tab, you can configure how you wish to receive notifications.

You can configure E-mail and browser notifications. Browser notifications are browser based messages that can appear in your browser when an action is complete.

Change your license information [↗](#)



In the License tab, you can find an overview of the available device licenses and duration.

Select “**Edit license**” if you want to make changes to it.

Select “**Cancel subscription**” if you no longer wish to use i3CONNECT Cortex.

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Of course you can immediately buy a license. The advantages of doing so are:

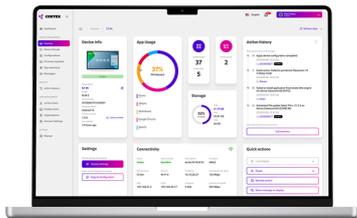
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Registering your i3CONNECT display

Registering your i3CONNECT display [🔗](#)

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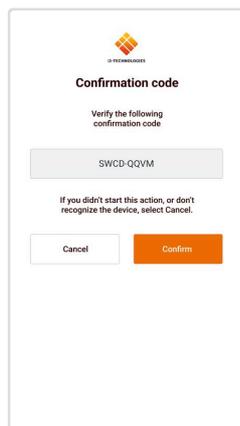
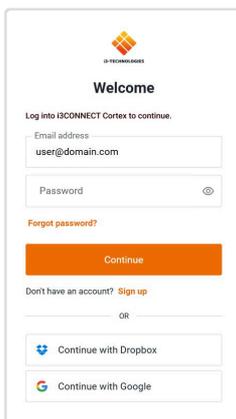
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The i3CONNECT Cortex Client app [↗](#)

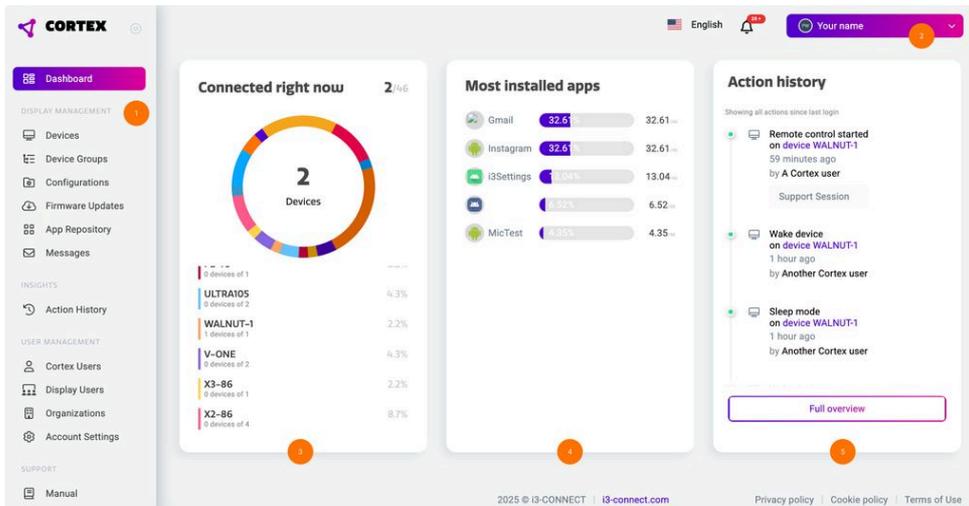


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For more information, see [Registering to i3CONNECT Cortex](#).

Your dashboard and navigating

Your account, dashboard and navigating [↗](#)



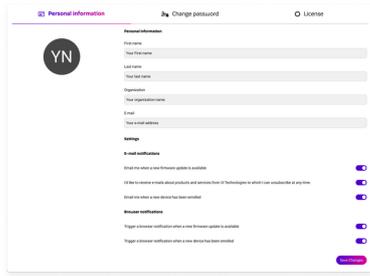
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- CAIR widget:** If your i3CONNECT display comes with a CAIR module, you may see this displayed at the bottom of your dashboard.

Manage your account [↗](#)

Go to “Your account” from the main menu to manage:

- Personal information and notification settings
- your password. If you signed up using Microsoft or Google, this feature is not available.



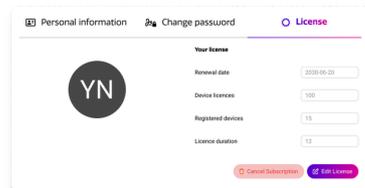
- License: manage the available device licenses in your account and/ or cancel your subscription.

Set Notifications [↗](#)

At the bottom of the “**Personal Information**” tab, you can configure how you wish to receive notifications.

You can configure E-mail and browser notifications. Browser notifications are browser based messages that can appear in your browser when an action is complete.

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Select “**Edit license**” if you want to make changes to it.

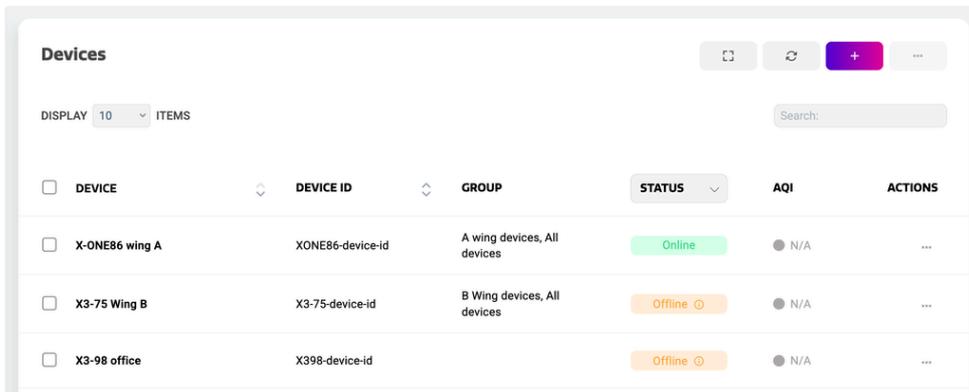
Select “**Cancel subscription**” if you no longer wish to use i3CONNECT Cortex.

Managing your devices

Managing your devices [↗](#)

Devices overview [↗](#)

You'll find all your registered i3CONNECT displays in the devices overview by selecting "Devices" from the main menu.



<input type="checkbox"/>	DEVICE	DEVICE ID	GROUP	STATUS	AQI	ACTIONS
<input type="checkbox"/>	X-ONE86 wing A	XONE86-device-id	A wing devices, All devices	Online	N/A	...
<input type="checkbox"/>	X3-75 Wing B	X3-75-device-id	B Wing devices, All devices	Offline	N/A	...
<input type="checkbox"/>	X3-98 office	X398-device-id		Offline	N/A	...

Selecting a display will bring you to the device details. Perform actions on the device by selecting the three dots "...". Need to perform an action on multiple devices? Select the checkboxes to the left of the devices and perform the action from the main actions menu at the top right corner of the overview.

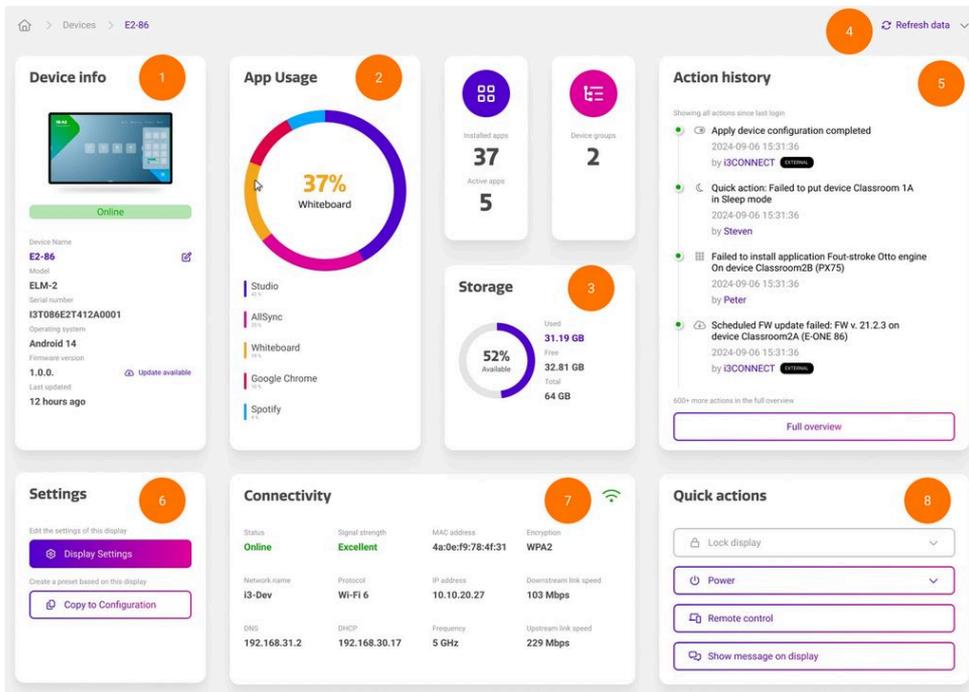
Device details [↗](#)

Select a device from the overview to see the device details. This should open the device details page giving a dashboard overview the most essential information.

The device details page is made up of two sections:

- Dashboard
- Table overview

Dashboard [🔗](#)



Your device details dashboard is composed of the following widgets or actions:

1. Device info
2. App usage
3. Storage
4. Refresh data
5. Action history
6. Settings
7. Connectivity
8. Quick actions

Device info [🔗](#)

This widget displays basic but important information from your i3CONNECT display. Review quickly if the display is online and the selected theme or wallpaper. See and edit device name or review the firmware version.

App usage [🔗](#)

The App usage widget displays the most popular apps on the i3CONNECT display.

Storage [🔗](#)

This widget tells you how much storage space has been used and how much is still available.

Refresh data [🔗](#)

Some widgets rely on actual data, but don't share live information, use the "Refresh Data" functionality at the top right of the screen. This will send a command to the device to retrieve new data. Do not mistake this feature with the browser refresh (F5), which will not give you actualized data.

Action history [🔗](#)

This widget displays all actions performed on this display since the last time you signed on. Consult the Actions history from the main menu for a full overview of performed actions.

Settings [🔗](#)

We've bundled all device settings into the Settings app. These settings combine i3CONNECT settings and Android settings in one convenient app which can be configured from i3CONNECT Studio as well as i3CONNECT Cortex. Consult the Settings app documentation page to see what can be configured from i3CONNECT Cortex.

Once you're happy with the settings from your i3CONNECT display, you can copy the settings into a configuration, to be applied on other devices or even device groups. If you still need to make changes, don't worry. The configuration will still be fully editable. See Configurations for more detailed information.

Connectivity [🔗](#)

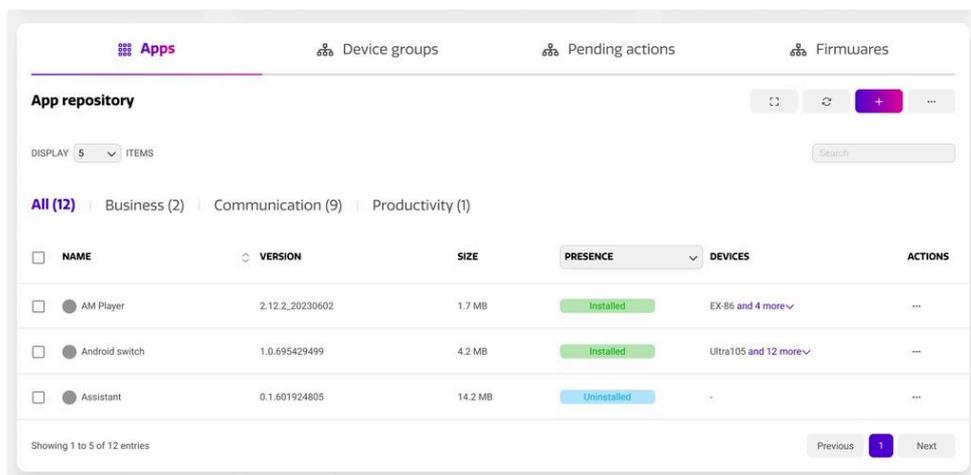
The Connectivity widget will inform you if the i3CONNECT display is online, and how it's connected.

Quick actions [🔗](#)

This widget allows administrators to perform a few actions on the i3CONNECT display:

- **Lock display:** quickly lock a display, for instance if you're applying a firmware update and prefer not to have users on the display while doing that.
- **Unlock the display:** if the display is locked, this action will allow an administrator to unlock it.
- **End a paused guest session:** If configured from i3CONNECT Cortex, guests will be able to pause a session and temporarily lock the display. If the guest user doesn't return, or forgot the PIN lock code, an administrator can manually end the paused session.
- **Power settings** such as:
 - turn the display off (note that a manual restart is required as this action cannot be done from i3CONNECT Cortex)
 - restart the display
 - set the display to sleep mode to save power
- **Remote control:** Remotely take over the i3CONNECT display with this action.
- **Show message on display:** Alert the users of the i3CONNECT display by displaying a message. For instance, if the display needs to be restarted. You can also find an overview of sent messages and write new messages to one or more devices by selecting "**Messages**" from the main menu.

Table overview [🔗](#)



<input type="checkbox"/>	NAME	VERSION	SIZE	PRESENCE	DEVICES	ACTIONS
<input type="checkbox"/>	AM Player	2.12.2_20230602	1.7 MB	Installed	EX-86 and 4 more	...
<input type="checkbox"/>	Android switch	1.0.695429499	4.2 MB	Installed	Ultra105 and 12 more	...
<input type="checkbox"/>	Assistant	0.1.601924805	14.2 MB	Uninstalled	-	...

This table will give you a good overview of:

- The apps installed on the display and the option to force stop or clear data
- The device groups that the display is in, and the ability to add or remove the display from device groups

- Pending actions on the display. If the i3CONNECT display is offline, actions and configurations will not be applied until it goes back online. In that case it is handy to have an idea of all the pending actions, waiting for the device to come back online and have the option to cancel them if they are no longer useful.
- Firmwares: Enable/ disable automatic Firmware updates and have an overview of all the available firmwares for the i3CONNECT display on this tab.

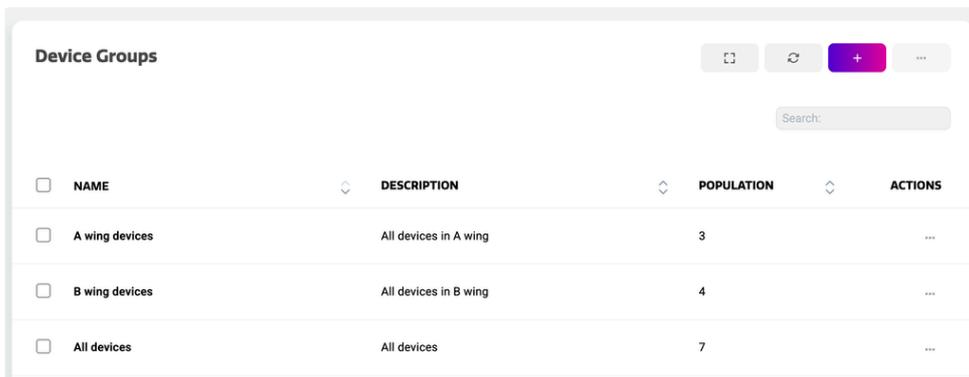
Managing your device groups

Managing your device groups [↗](#)

Device groups overview [↗](#)

Just like with individual devices, you can perform actions on grouped i3CONNECT displays, or device groups. Device groups are a group of i3CONNECT displays which you can use to simultaneously apply specific actions on such as a Remote Configuration or User Profiles. Instead of performing the action on each display individually, you can perform it once on a device group and let i3CONNECT Cortex do all the work.

You can create new device groups, as well as consult them in the device groups overview by selecting “Device groups” from the main menu.



<input type="checkbox"/>	NAME	DESCRIPTION	POPULATION	ACTIONS
<input type="checkbox"/>	A wing devices	All devices in A wing	3	...
<input type="checkbox"/>	B wing devices	All devices in B wing	4	...
<input type="checkbox"/>	All devices	All devices	7	...

Selecting a group will bring you to the device group details. Perform actions (like apply a configuration) on the device group by selecting the three dots “...” and load the actions menu. Select multiple device groups at once by selecting the checkboxes to the left of the device groups and perform the action from the main actions menu at the top right corner of the overview.

Select the column titles and you can change the sorting, for instance to change alphabetic sorting from A to Z to Z to A.

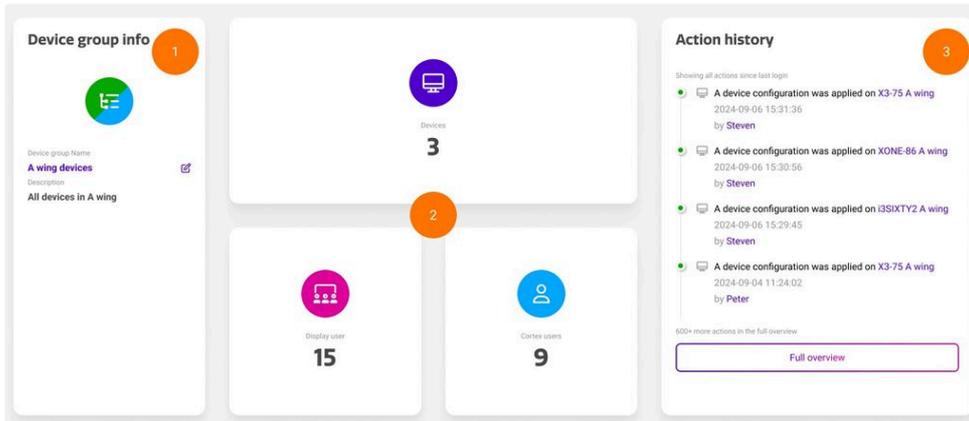
Device group details [↗](#)

Select a device group from the overview to see the device group details. This should open the device group details page giving a dashboard overview the most essential information.

The device group details page is made up of two sections:

- Dashboard
- Table overview

Dashboard [🔗](#)



Your device group details dashboard is composed of the following widgets:

1. Device group info
2. Total devices, total display users and total Cortex users widgets
3. Action history

Device group info [🔗](#)

See and edit the device group name and description.

Total devices, displays users and Cortex users widgets [🔗](#)

These widgets give you a quick overview of:

- the total amount of devices in the device group
- the total amount of display users, if User Profiles is activated for this device group. See User Profiles for more information.
- the total amount of Cortex users that can manage this device group. See Cortex users for more information.

Action history [🔗](#)

This widget displays all actions performed on displays within this device group since the last time you signed on. Consult the Actions history from the main menu for a full overview of performed actions.

Table overview [🔗](#)

DEVICE	DEVICE ID	ACTIONS
<input type="checkbox"/> X3-75 A wing	X3-75-device-id	...
<input type="checkbox"/> XONE-86 A wing	XONE-86-device-id	...
<input type="checkbox"/> I3SIXTY2 A wing	I3SIXTY2-device-id	...

Showing 1 to 3 of 3 entries

This table will give you an overview of:

- The devices in this device group and the ability to add or remove devices.
- The display users in this device group. If User Profiles is activated for this device group, the display users in this list can sign in to the displays within this group with their user profile.

- The Cortex users that have access rights to this device group and the devices in that group.

Firmware management

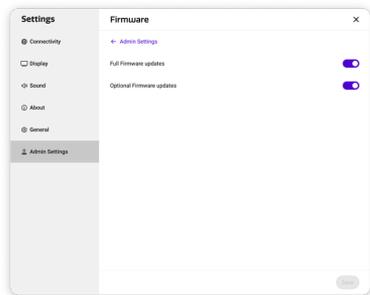
What are OTA firmware updates [↗](#)

OTA update stands for over-the-air update and allows to wirelessly update the firmware of your i3CONNECT display(s). All i3CONNECT displays have this feature built in, and it can be controlled on the device itself. It is possible to control the firmware updates remotely in i3CONNECT Cortex as well, both for full and optional firmware updates.

There are 3 types of firmware updates:

- **Full:** this is a regular firmware update and can contain new or improved features and important bugfixes. When automatic updates are enabled on the device, this firmware update will automatically be installed when they become available.
- **Optional:** this update mostly contains bugfixes or small improvements. These updates require user interaction and will not be installed automatically.
- **Mandatory:** this update will contain important changes that are required to be able to install any future updates, it cannot be skipped. When automatic updates are enabled on the device, this firmware update will automatically be installed when they become available.

How to toggle automatic firmware updates [↗](#)



Automatic full and optional firmware updates can be toggled on and off. When this setting is disabled, the device will no longer automatically download and update new firmware updates. This can be done in the Settings app, under Admin settings.

Manage firmware updates from the firmware overview page [↗](#)

Firmware updates overview [↗](#)

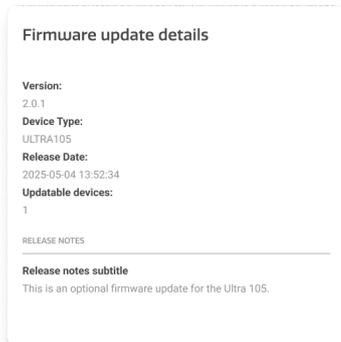


In the main menu select “**Firmware Updates**”

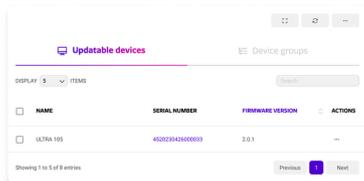
This will open the firmware overview screen. It will list all available firmware update that are relevant for any of the registered devices in i3CONNECT Cortex.

This list provides the version, the device model it is available for and the release date.

Firmware detail screen [↗](#)

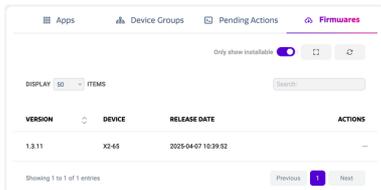


The firmware detail screen will provide more information on the selected firmware. Besides the information that was already available on the list screen, it will also show the number of registered devices that can be updated and the release notes.



The right part of the detail screen will show the devices that can be updated or device groups containing any device that is updatable with the selected firmware

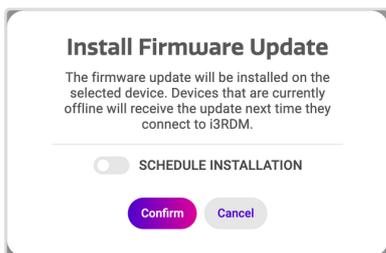
Manage firmware updates from the device detail page [↗](#)



The **Firmwares** tab in the Table overview of the device details page will show a list of firmware updates that are available for the selected device.

Select **“Install”** from the Actions menu to install the firmware update.

Install a firmware update [↗](#)

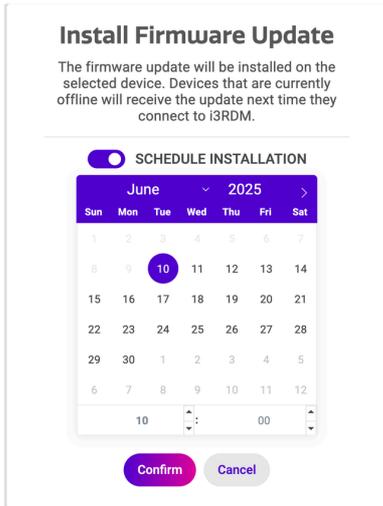


From the device or group overview, select one or more items and click the install button.

Click the confirm button in the dialog and the update will be installed to the selected devices or compatible devices in any of the selected groups. If the selection contains any devices that are currently offline, the command to install the firmware update will be dispatched the next time those devices connect to the RMD server.

Schedule a firmware update [↗](#)

Besides sending the command directly, it is also possible to schedule the update to be installed at a specific time.



Selecting the “**Schedule installation**” toggle will open up the calendar control which allows to select a date and time.

After clicking the confirm button the update will be scheduled. It is then also listed in the **Pending actions** overview in your device details.

- ⚠
 - Only the last issued firmware update command will be retained in the pending actions. It is not possible to schedule multiple firmware updates or have more than one offline pending firmware update command.
 - If a device is not connected to the Cortex server at the time the scheduled command is dispatched, the command will be marked as “offline” and will automatically be sent to the device the next time it connects to the Cortex server.

Notifications [🔗](#)

Whenever a new firmware becomes available for any of your registered devices, notifications are sent out. There are 3 different notification channels:

1. Via the notification icon in the **top status bar**:
2. As a **browser notification**. The application will ask for permission to show the notifications. Otherwise, it can be activated in your Account settings, section Browser notifications.
3. An **email notification**. This can also be controlled from your Account settings, section E-mail notifications.

Managing apps

Managing apps [↗](#)

i3CONNECT Cortex allows you to remotely install and uninstall apps on your fleet of i3CONNECT displays.

The App repository [↗](#)

The app repository is the central location within i3CONNECT Cortex where you can upload applications that you wish to install on any or all devices within your device fleet. It also gives you an overview of the number of devices that the app is installed to.

Device detail page overview [↗](#)

In the table overview at the bottom of the **device details page**, the “**Apps**” section will tell you what apps are installed on the i3CONNECT display. These may not all be apps that are available from the app repository, as users might have installed them from the display. Any apps that have been uploaded to the app repository and that have not been installed on the display, will appear in this list as Not installed.

Uploading apps [↗](#)



By default you can upload any APK file to your app repository after which it can be installed remotely on any registered i3CONNECT display. In the “**App repository**”, select the “+” button.

In the dialog, optionally select a category and upload the application. You will now find the application in your repository after which you can install it on one or more devices in your fleet.

Installing and uninstalling apps [↗](#)

Applications that were added to the App Repository can easily be installed (or uninstalled) on a device from either the app repository or from the device details page in the table overview.

From the app repository [↗](#)

Choose the app you want to install, from the actions menu, select the three dots “...” and choose “**Install**”. A dialog will open. Choose a device or device group from the left column and move them to the right column to install it on that device or device group. The app will be queued for installation. It may take a few minutes for the installation to complete before the status changes.

Uninstalling can be done from the same actions menu. In this case, select “Uninstall” from the Actions menu and from the left column, move the devices from which to uninstall the app to the right column.

From the device details page [↗](#)

To install an application, navigate to the device detail page of the device you for which you wish to install the app. Find your app in the apps section of the table overview at the bottom of the page, below the dashboard. In the Actions menu of the app, select the three dots “...” and select “**Install**”.

Uninstalling from the device details page is similar but can only be done from apps that have been installed on the device. In that case, from the Actions menu of the app, select the three dots “...” and select “**Uninstall**”. If this feature is not available, then the app you’re trying to uninstall, is a systems app and can not be uninstalled.

Starting an installed app [↗](#)

- Navigate to the device detail page of the device for which you wish to manage the app.
- Find your app in the Apps section of the table view at the bottom of the page.
- In the Actions menu of the app, select “**Start**”.

Force quit an installed app [↗](#)

- Navigate to the device detail page of the device for which you wish to manage the app.
- Find your app in the Apps section of the table view at the bottom of the page.
- In the action menu of the app, select “**Force quit**”.

Clear app data of an installed application [↗](#)

- Navigate to the device detail page of the device for which you wish to manage the app.
- Find your app in the Apps section of the table view at the bottom of the page.
- In the action menu of the app, select “**Clear data**”.

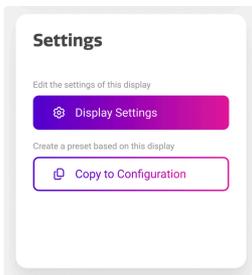
Using the Settings app

Using the Settings app [🔗](#)

We bundled all the major Android settings, i3CONNECT specific settings and access management related settings into one easily accessible and manageable application. The Settings app in i3CONNECT Cortex has a similar UX to the Settings app in i3CONNECT Studio. This way, administrators will be able to use it easily on both platforms.

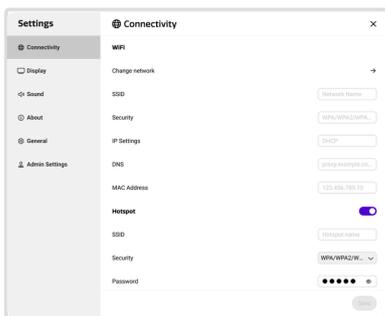
i Tip: once you're satisfied with the settings, you can copy them to a configuration preset. This will be saved to your configurations, where you can still edit if necessary and apply them to other i3CONNECT displays.

Loading the Settings app [🔗](#)



The Settings app can be accessed from the device details page of the i3CONNECT display that you want to configure. Locate the i3CONNECT display in your list of devices and select it.

On the dashboard of the device details page, locate the Settings widget and select "Display Settings".

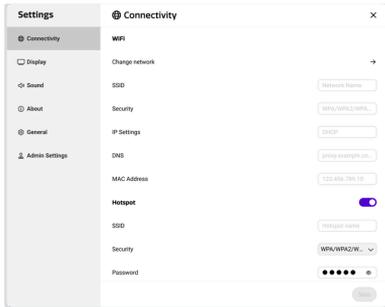


The Settings app will load in a dialog, similar to this.

Just like in i3CONNECT Studio (apart from Studio specific settings), the i3CONNECT Cortex Settings app is structured in the following main sections:

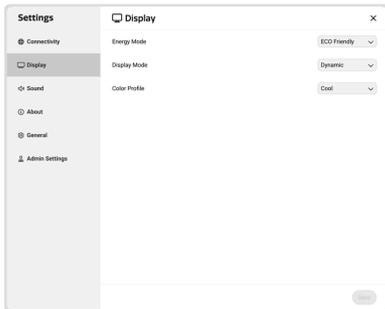
- Connectivity
- Display
- Sound
- About
- General
- Admin Settings

i If you are managing a display that still has a legacy i3STUDIO installation, you will only see General and Admin settings, which replace the [Default and Advanced settings](#).



Connectivity [↗](#)

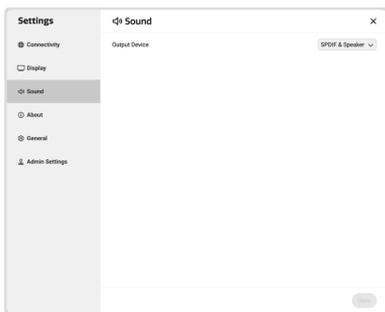
The Connectivity section allows you to view Wi-Fi or ethernet settings, change Wi-Fi network or use the display as a hotspot.



Display [↗](#)

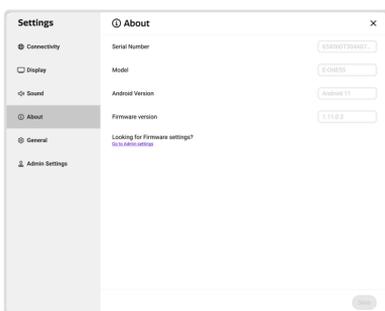
Make life easier for users that spend a great deal of time looking at the display and fine tune their viewing experience with features such as:

- Automatic brightness in Energy mode
- Set Color profiles
- Set a Dynamic display mode



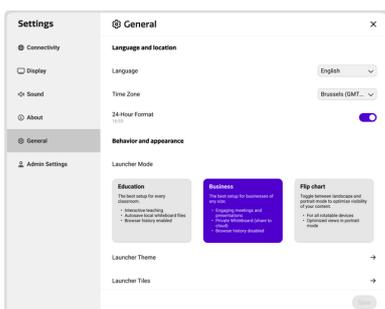
Sound settings [↗](#)

Choose here which device should play audio.



About [↗](#)

Consult display specific information, such as Serial number, Android version and Firmware version.



General settings [↗](#)

Allows administrators to set a lot of personalisation features.

Language and location [↗](#)

Set the device language, time zone and hour format.

Behavior and appearance [↗](#)

Set the Launcher Mode by choosing between Education, Business or Flip chart Mode (only available for our rotatable displays).

Launcher theme [↗](#)

Choose a theme for the i3CONNECT display, and enable/disable the Bottom menu.

Launcher Tiles [↗](#)

Add and configure up to 8 tiles on the Launcher Home page.

Wallpaper [↗](#)

Upload a wallpaper for the Launcher Home page.

Whiteboard preferences [↗](#)

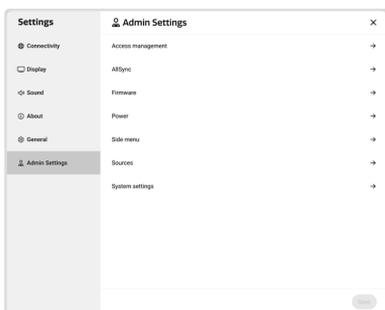
- Enable/ disable Auto saving
- Position menus at bottom
- Enable Whiteboard Mode/ Blackboard Mode
- Enable Education (VR) tools
- Set Pen & Finger preference (allows users to customize how they want to use the pens that come with the i3CONNECT display)
 - Single Mode
 - Basic Mode
 - Expert Mode
- Set SMTP settings (configure your own mailserver)
- Add and manage Icon Libraries
- Enable/ disable Export functionalities in Whiteboard

Multifunctional button [↗](#)

Enable and configure the multifunctional button, if present on your i3CONNECT display.

HDMI settings [↗](#)

Set and configure the HDMI in- and output settings.



Admin settings [↗](#)

The admin menu is, as the name suggests, tailored for system administrators that might require advanced features such as:

Access Management [↗](#)

Access Management is a powerful feature in i3CONNECT Cortex and is detailed in [Managing access to your i3CONNECT display](#).

Allsync [↗](#)

We've bundled all the Allsync settings in the Settings app. This way,

administrators can configure settings

such as:

- Require Login code
- Moderator Mode
- Allowed connection methods
- and many more

Firmware [↗](#)

Enable/ disable full and optional firmware updates.

Power [↗](#)

Take control over power consumption of your device fleet, right from within i3CONNECT Cortex with powerful (pun intended) settings such as:

- Inactivity detection
- Power On behavior
- Power schedules

Side menu [↗](#)

Configure the Side menus in i3CONNECT Studio by enabling/ disabling the tiles that are available in Tools and the Quick Actions.

Sources [↗](#)

Enable/ disable and rename the available input sources of your i3CONNECT display.

System settings [↗](#)

Add extra security to your i3CONNECT Studio display by requiring a 6-digit PIN code for the Admin settings. Users will not be able to access the Admin settings section unless they enter that PIN code.

Configurations

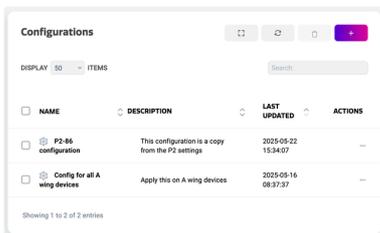
Configurations [🔗](#)

Configurations are a powerful feature of i3CONNECT Cortex that allows administrators to capture certain i3CONNECT STUDIO settings and store them as a configuration or create a new configuration from scratch . That configuration can then be used to apply the same settings to one or more devices or a Device group or reset the device to a preconfigured state.

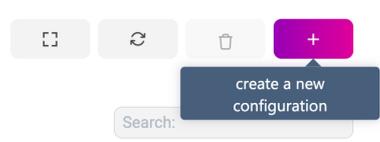
Which settings can be configured? [🔗](#)

All the settings that are now available from the Settings app in i3CONNECT Cortex can be saved as a configuration. Simply load up the Settings app to see what's inside, or see [Using the Settings app](#) to find out what's possible.

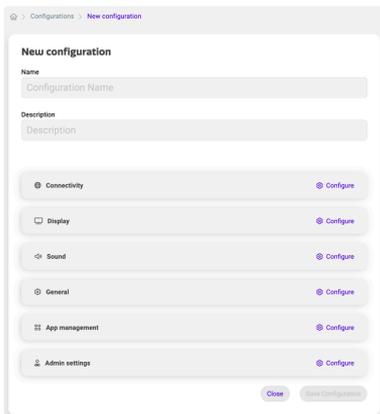
Creating a new configuration [🔗](#)



One way to create a configuration is to start with a clean slate. Select **“Configurations”** from the main menu. This loads the overview of configurations that you can edit or apply, but it could also be empty if you don't have any yet.



To create a new configuration, select the **“+”** button at the top right of the configurations overview.

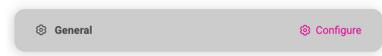


It will now create a new, empty configuration. At the top you can enter a name and a description. You can also enter this information at the end if you don't know yet what you're going to configure.

Below that, you'll see all the sections that you also have in the Settings app, in the same order but horizontally. Each section can be configured individually, but can also be left empty

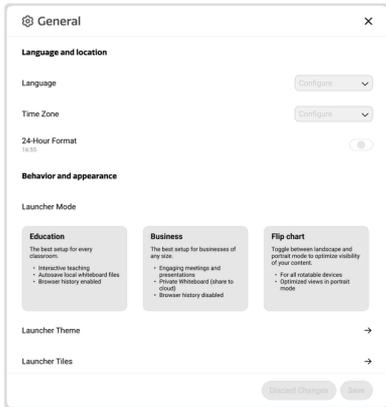
if you don't want to configure that section.

Go to the section that you want to edit and select **“Configure”**.

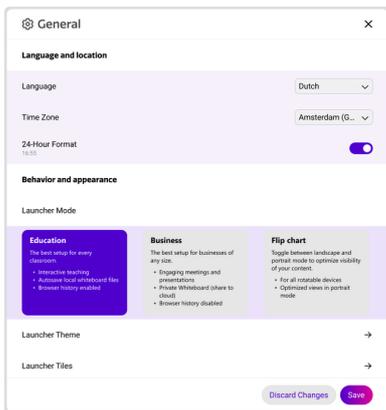


The Settings app will appear, showing the settings of that section.

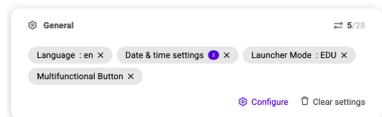
The settings here appear in the “not configured” state. This means, that if you leave them this way, your i3CONNECT display will not update this setting, when the configuration is applied. Select them to change the value and it will change the value that was previously set on the display.



When a setting is configured, the state will display the value and the background of the setting will light up. If you discard the changes, the settings will return to the default value.



Select **“Save”** when you're ready configuring the section and they will all line up nicely within the section of that configuration as pills.



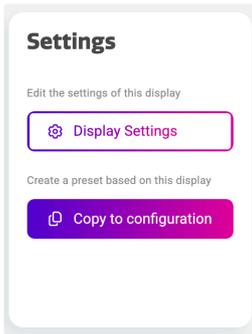
The pills display the value of the configured setting. If you need to make changes, select them and the settings app will bring you to their location. Remove them if unnecessary or clear all settings in one go by selecting “Clear settings”.

Some pills show a number. That is because it is a grouped setting, with more than one setting inside. In that case, the pill will show the total of settings.

When you're done configuring all the sections that you want to configure, make sure to select **“Save configuration”**. If you hadn't set the name and/ or description already, it will ask you to do so. Once, saved, your configuration is now visible in the configurations overview.

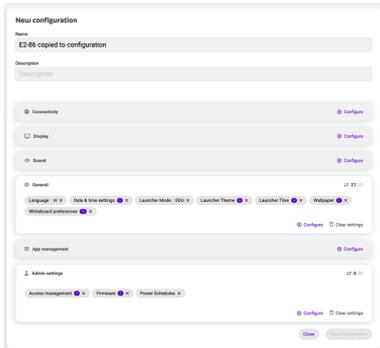
How to capture settings to a configuration [🔗](#)

This is a very straight forward way to creating a configuration as it will copy the settings as a preset into your new configuration, which can then be reviewed and/ or edited.



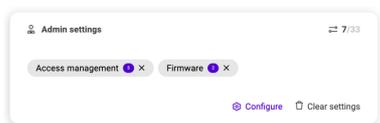
Locate the device details of the i3CONNECT display, which settings you want to copy to a configuration. When on the device details page, locate the **Settings widget**.

Here you have two options, either to load the Settings app or to copy its configured state to a new configuration. That's what we want to do, so select **“Copy to configuration”** and confirm the dialog.



Select **“View configuration”** when it's done copying. This will load the details of this new configuration. At the top you can see the name of the configuration which will depend on the name of the display that you copied the settings from. You can rename this field, and add a description.

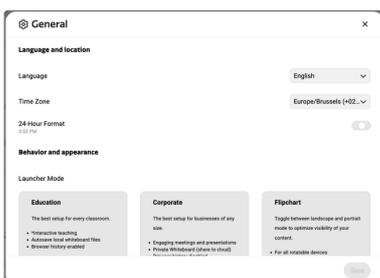
Below, you will see the same sections that are also visible in the Settings app. Some sections will have configured settings while others might be empty, like in the image to the left. That is because the configuration will only copy the settings that are not left in its default state.



The sections that have configured settings, will show these settings as pills, which can be selected and/ or deleted from the configuration if necessary. Some pills show a number. That is because it is a grouped setting, with more than one setting inside. In that case, the pill will show the total of settings.

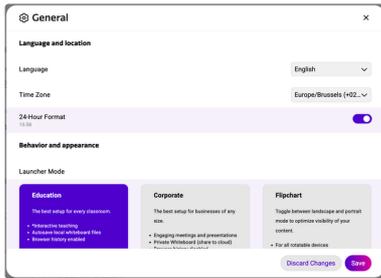


You can always add new settings to the configuration, whether the section is empty or not. Go to the section that you want to edit and select **“Configure”**.

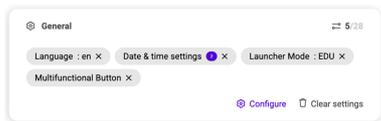


The Settings app will appear, showing the settings of that section.

While some settings may seem preconfigured, others will show a not-configured state, like the toggle to the left for instance.



When you make changes to a settings, that setting will display a light purple color in the background, showing you that this is a recently configured setting, which need to be saved or discarded.



Select “Save” when you’re ready configuring the section and they will all line up nicely within the section of that configuration. If you need to make changes, select them and the settings app will bring you to their location. Remove them if unnecessary or clear all settings in one go by selecting “Clear settings”.

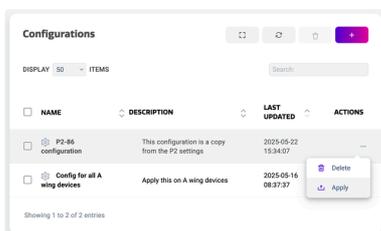
Editing an existing configuration

It is perfectly possible to open an existing configuration and make changes to the settings inside. Simply go to the configurations overview and select any of the configurations you’ve made before. No inspiration or no idea where to start? Try capturing existing device settings to a configuration from the device details page. Once saved to a configuration, you’ll see a visual overview of all the settings as configured on the device. You can now make changes, remove settings or add new settings to the configuration.

Legacy snapshots

Unfortunately, legacy snapshots can not be edited. If you still have old snapshots in your configurations list, an error icon will show you that it’s a legacy snapshots and that it’s use has been deprecated. You can still apply that snapshot to other devices.

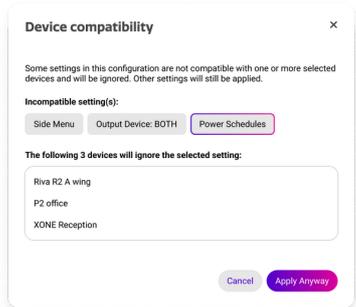
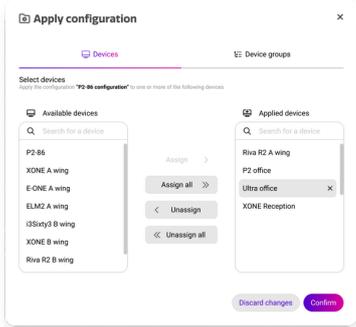
Applying a configuration



Now that you’re ready with your configuration, you can apply it on one or more i3CONNECT displays within your fleet of registered devices.

Select the configuration you want to apply from the Configurations overview and select “...” from the Actions tab. From the dropdown, select “Apply”.

A dialog appears where you can select the devices that you want to apply the configuration to. You can combine this with device groups by selecting the Device groups tab and selecting the device groups with displays that you want to apply the configuration to.



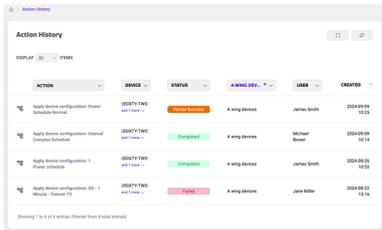
If one or more settings in your configuration is incompatible with the displays that you want to apply it to, this dialog will appear when you select “**Confirm**” and inform you of the devices that will ignore that specific setting if you select “Apply anyway”.

Tracking an applied configuration [🔗](#)

To know what happened to a configuration after applying it, you can have a detailed overview in the Actions History where you can see the status of each action sent to a device or group of devices. See [Action History](#) for more information.

Action History

Action History [🔗](#)



The Action History overview will give you a detailed overview of actions to your fleet of i3CONNECT displays. This overview can be opened from the main menu by selecting “**Action history**”, but you can also find display specific history in the device details dashboard of your selected display.

Command types [🔗](#)

The Action history overview combines applied single actions, grouped actions and configurations. To show the difference between actions and configurations we use icons.

Single actions [🔗](#)

This is a basic action and usually exists of a single setting or action taken from the Quick actions widget. It doesn't show an icon in front of the action.

Grouped actions [🔗](#)

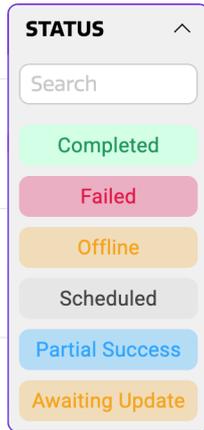
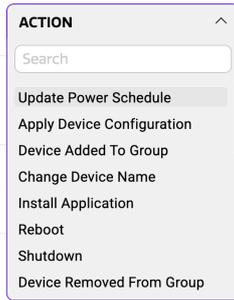
Actions applied to a device group can be recognised by the group icon displayed in front of the action. It also shows the affected i3CONNECT displays. A user can click on such a grouped action to filter down into the list of displays to which this action was sent. Here they can find the status of the action for each individual display.

Configurations [🔗](#)

A configuration can also be sent to a device or device group. When it's sent to a device, it can be recognised by the configuration icon in front of the configuration. A user can click on such a configuration to filter down into the list of displays to which the configuration was sent.

Filtering the overview [🔗](#)

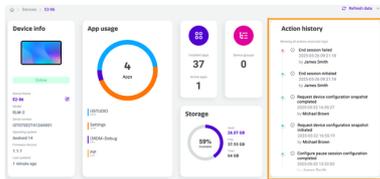
Actions can be filtered, for instance by action type, device or status. Select the table row title and filter using any of the available values. Multiple filters can be applied at once, by selecting a value from other table row titles.



The action status is a filter that you can use to narrow down any possible errors that might occur. Select “Failed” to see all the actions that failed to apply.

A “scheduled” action occurs when an action has been sent to a device that still needs to apply it.

Action history per device or device group [🔗](#)



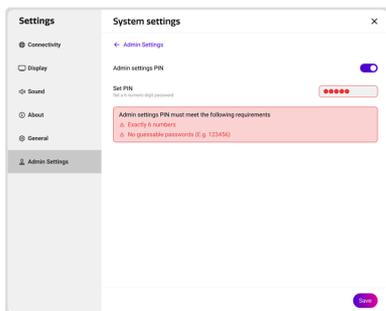
You can also find an action history overview per device or per device group in the action history widgets on the device or device group dashboard.

Managing access to your i3CONNECT display

Managing and restricting access to your i3CONNECT display [🔗](#)

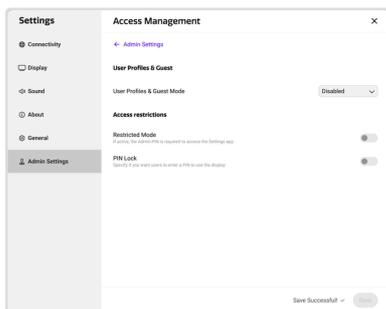
As our i3CONNECT displays are designed to be available to a wide range of users, often in open spaces, we made sure that i3CONNECT Studio could offer plenty of options for system administrators to manage and limit access to the display. Here we list the many ways you can secure your i3CONNECT display and your systems.

How to restrict access to the Admin Menu [🔗](#)



For security reasons, the Admin settings section in i3CONNECT Studio can be secured with a 6-digit PIN lock. This way, users will need to enter that PIN lock code to be able to access all sensitive settings in the Admin menu. To enable this in Cortex, open the Settings app. under Admin settings, select System settings and enable Admin settings PIN. Choose a 6-digit PIN and save.

How to restrict access to the Settings app [🔗](#)

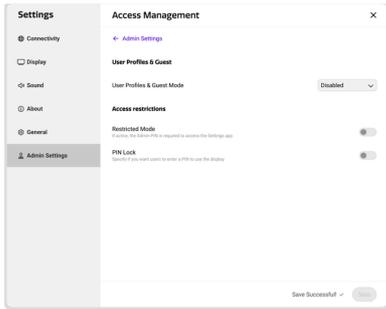


Access to the Settings app can be disabled altogether. Note that this way, users won't be able to configure general settings like wallpaper or device language.

Under Admin settings, select Access management and enable Restricted Mode. This will require users to enter the Admin settings PIN to open the Settings app.

Require users to enter a PIN lock to use the i3CONNECT display [🔗](#)

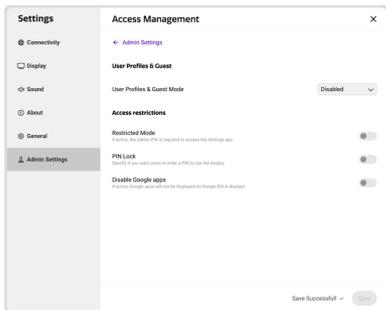
If your i3CONNECT display is in an environment with a lot of people, and you want only a few to be able to use



them, you might want to configure it with a PIN lock.

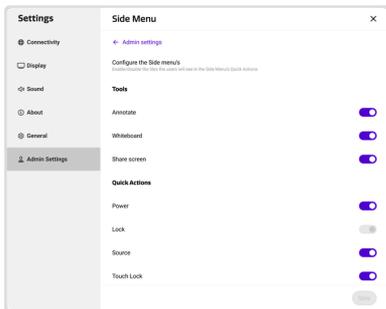
Under Admin settings, select Access management and enable PIN Lock. Display users will now be required to enter a given PIN lock code whenever they want to use the display.

How to disable Google apps on an EDLA device [↗](#)

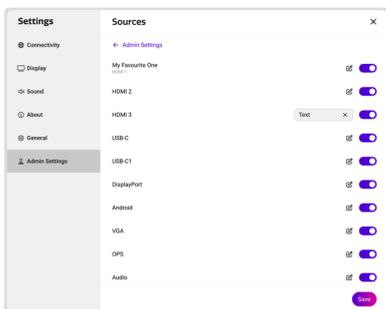


If your i3CONNECT display is an EDLA certified display, it'll come with a lot of Google apps. To disable them, go to Admin Settings, Access Management and toggle Disable Google apps.

How to restrict access to Quick actions or input sources in the Side menu [↗](#)



Under Admin settings, select Side Menu. This gives you an overview of the tiles that will be available in the Side menus in i3CONNECT Studio. Disable the tiles that you don't want Display users to be able to use and they won't be visible in the side menus.

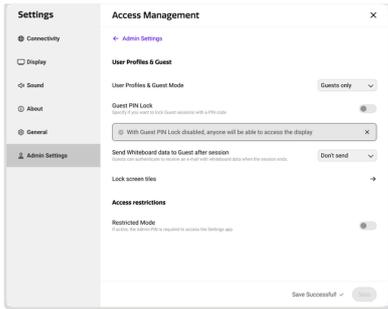


The same restrictions can be applied for input sources. Under Admin settings, select Sources. Disable the input sources that you don't want users to be able to use.

How to configure your i3CONNECT display to use Guest sessions [↗](#)

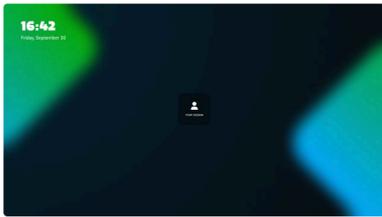
Guest sessions can be ideal for guests within an organisation, or people who like the ease-of-use to log in with a single click, knowing that all the session data will be removed once they log out.

This Guest session can be fully configured from within i3CONNECT Cortex.



In the Admin Settings, select Access Management. Under the subsection, locate “User profiles & Guest”. This dropdown has three options:

- **Disabled:** this is the default setting and is ideal for open displays that need to be accessible to a lot of people.
- **Guests only:** this setting requires all users of the display to start a Guest session. Only one session can be created at a time, and each session (along with its data) will be removed when the session ends.
- **User Profiles:** this setting adds the User Profile option next to the Guest session. See the next section for User Profiles.



Guests only Mode [↗](#)

Set User Profiles & Guest Mode to Guests only and the Launcher Home Page on your i3CONNECT display will display a single tile, allowing only Guest sessions. When a user selects this tile, they will be explained that all session data will be removed when they sign out. A guest session will automatically end when inactivity is detected.

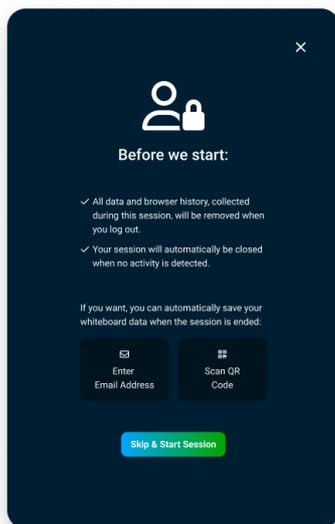
Guest PIN Lock [↗](#)

Enable Guest PIN Lock and guests will be required to enter that 4-digit PIN lock code to be able to start a session.

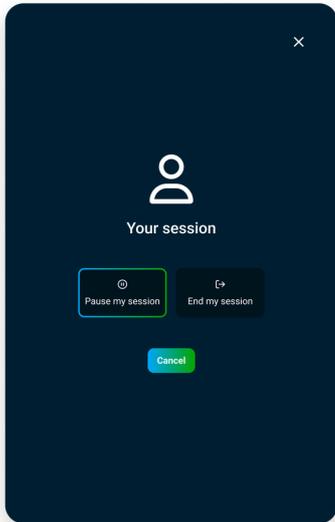


Send whiteboard data at end of session [↗](#)

By default, all data from the guest session will be removed when the session ends, either by the user or when inactivity occurs. Administrators can, however, choose to allow whiteboard data gathered in the session, to be sent to the user. Choose between cloud authentication (SSO with Google and Microsoft authentication as options), e-mail address authentication or allow both and let the user choose.



When a display user starts a guest session, they will see a dialog, asking them if they'd like to receive the whiteboard data. If they do, they will be asked to authenticate using one of the options selected.



Pause and end a guest session [🔗](#)

Ending a guest session means that all the data will be removed from the display. Enable “Guests can pause session” and they will be given the choice to either end or pause their session. If they pause the session, the display will be locked and can only be unlocked with a unique PIN lock.

This option is only available if cloud or e-mail authentication is enabled above, because if this setting is enabled, an e-mail will be sent to that display user with a unique PIN lock code to unlock the paused session.

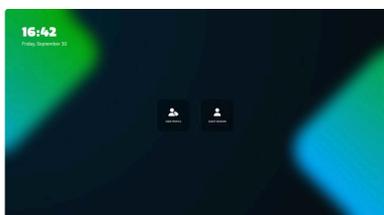
The paused session can be set to automatically expire, after a given time-out period.

Ending a paused session [🔗](#)

You can configure paused sessions to end automatically after a defined time and/ or allow other display users who want to use the display to end the paused session on the display. This adds a button to the launcher screen, allowing display users to end a paused session. The session will end and, if configured, send the whiteboard data to the user that initiated the previous session. The display will then allow for a new guest session to be initiated.

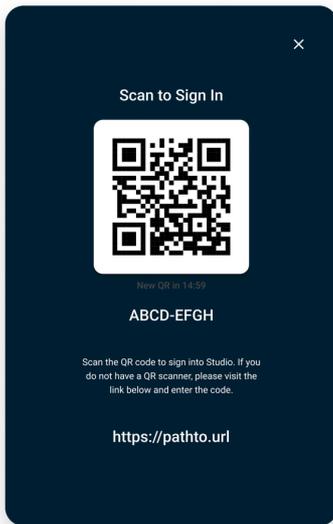
How to configure your i3CONNECT display to use User Profiles [🔗](#)

Along with the powerful Guest session, you can also enable User Profiles. User Profiles is perfect for returning users that want to keep their whiteboard data in the cloud so they can access them easily every time they sign on. Even though users can also connect Whiteboard to the cloud in open Studio environments, User Profiles provides the user with more security, as their profile data will only be available to them, on any device they sign on to.



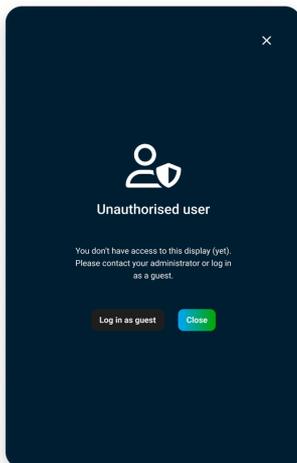
In the Admin Settings, select Access Management. Locate “User profiles & Guest access” and select “User Profiles”.

The launcher screen will change and display two tiles “User Profile” and “Guest session”. The Guest session is the same as explained above.



User profiles will allow a **registered** display user to sign on using SSO cloud authentication, either by scanning a QR code with a mobile phone or entering the URL below in a browser. The user will be asked how they wish to authenticate, allowing a Microsoft or a Google account.

They have a limited time to do so. If the authentication window expires, they can request a new one.

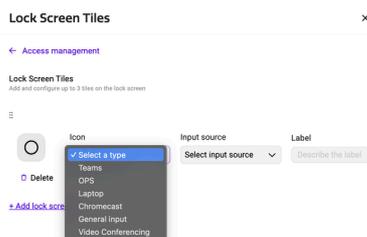


The display user needs to be a registered Display user to be able to sign on as a User Profile. Display users can be added to individual or a group of i3CONNECT displays in “Display Users” or in the overview table of the device details .

Adding and managing Display users can be done in “Display users”. See [Managing Display Users](#) for more information.

How to combine sessions and/ or User profiles with predefined input sources

Configure your i3CONNECT display to allow users to bypass the user access and, just like on an open display, immediately switch to a **connected external source**. Up to three sources can individually be defined in i3CONNECT Cortex by an administrator.



In the Admin Settings, select Access Management. Locate the subsection “Lock Screen Tiles” and open it.

Select “+ Add lock screen tile” and a few options appear, depending on the available connected input sources on the i3CONNECT display. You can add up to three input sources.

Your launcher screen might appear similar to this. To the left, the



connection methods appear. If only Guest access is allowed, the User Profile access will not be displayed.

To the right, the input sources will be displayed. Users that connect it, will be brought immediately to that input source.

If an input source is offline or not available, the tile can not be selected and will be greyed out to visually show the user that the source is not available.



The Side menu will now only display the available input sources, allowing users to quickly switch between input sources. To go back to the Launcher screen, select the Home button.

User Management

In i3CONNECT Cortex, there are 2 types of users:

1. **Cortex Users:** these users have access to the i3CONNECT Cortex website to manage your fleet of i3CONNECT displays and/ or other organisations.
2. **Display Users:** these users are allowed to log in on the i3CONNECT displays when the user profiles feature is activated.

Cortex users [🔗](#)

There are 3 levels of i3CONNECT Cortex Users:

1. **Company Administrator** : can administrate all devices, Cortex Users and Display Users as well as account info. In other words, this user type can access the complete application.
2. **Device Administrator** : can administrate one, several or all (if selected) device groups, but can not access the Display Users, Cortex Users or the account info.
3. **Read only user** : can only see basic information of one, several or all (if selected) device groups.

If configured, administrators may also be given access rights to manage other organizations. See Organizations for more information.

Overview of Cortex Users [🔗](#)

Company administrators can see an overview of all the Cortex Users within the account. In the main menu, under the section User management, select “**Cortex Users**”.

You’ll see a table with all the existing users who have access to your account. Here you can add new users, edit existing users and remove them from your account.

Creating a new Cortex User [🔗](#)

In order to create a new user, you must be signed in as a Company administrator.

Go to “**Cortex Users**”. At the top right corner of the table, select the + sign.

A modal will pop up that might look like the image to the left. Here you can add the personal details and select the role. See above for more information on the differences between the roles.

If you select a Read Only user, or a device administrator, you are given the choice if the user needs to be able to access all devices in your account of specific devices. By deselecting this

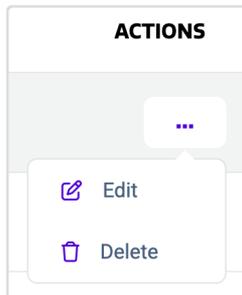
toggle, the tab Device Groups becomes available.

Adding a user to a Device Group can then be done easily by selecting the Device group from the list of available Device groups and moving it to the Assigned Device Groups.

If you allow your user to access linked organizations, the tab Organizations will become active and allow you to assign the user to one or more linked organizations (if activated). If you assign the user to an organizations, they will be able to access and manage their fleet of i3CONNECT displays. See Organizations for more information.

Hit Save and your new user will receive an e-mail to register to your i3CONNECT Cortex account.

Editing or removing a Cortex User [↗](#)



Locate the user that you want to edit or remove in the Cortex Users page. Again, you have to be signed in as a Company Administrator to be able to see this page. Under the actions tab, you'll find the options to edit or delete.

Selecting Edit will open the modal with the user details, the user role and the assigned Device Groups.

Selecting Delete will remove the user from your i3CONNECT Cortex account.

Display Users [↗](#)

Display Users are registered User Profiles that can access one or more i3CONNECT displays within your fleet of devices. They don't have access to i3CONNECT Cortex, but their access rights can be managed by administrators within i3CONNECT Cortex.

What are User Profiles? [↗](#)

With User Profiles, we give you and your users more security and control over how the i3CONNECT displays are used. Allow registered Display Users to log in to i3CONNECT Studio using their own login credentials, while adding more security to the Guest session, if activated.

Registered Display Users will be able to add their personal Cloud drives (Google Drive or Microsoft OneDrive) to i3Whiteboard in a secure and private way thanks to

their connected User Profile. Only they will be able to access it because once they log out of the User Profile, it can not be accessed by other users.

How to enable User Profiles [↗](#)

Enable User Profiles for your i3CONNECT display in the Settings app in i3CONNECT Cortex. This means that your i3CONNECT display has to be registered to i3CONNECT Cortex. If you haven't already done so, please consult [Registering your i3CONNECT display](#) for more information.

If your i3CONNECT display has already been registered, consult [Managing access to your i3CONNECT display | How to configure your i3CONNECT display to use User Profiles](#) to learn how to enable User Profiles on your i3CONNECT display.

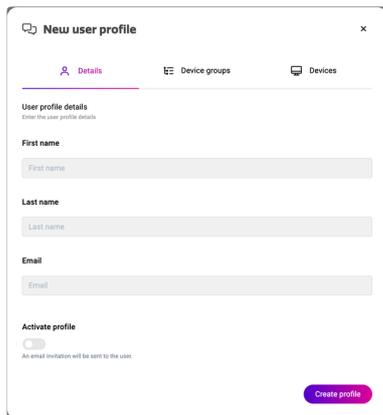
Adding Display Users [↗](#)

In the menu, under User management, select 'Display Users'. If you had previously added users, or if there are several users with administrative functions, you will find them listed in the table on this page. If not, the table will be empty.

Manual creation [↗](#)

To add new Display Users, click the '+' sign at the top right of the table overview.

A dialog will pop up with three tabs, Details, Groups and Devices.



Details [↗](#)

Here you can add the personal details of the user that you want to create. You don't need to worry about the profile activation yet. If you prefer, you can do this at the end. or select all your Display users and activate them at once.

Groups [↗](#)

Groups are groups of devices. These can be created under the menu 'Groups'. If you created a Group of devices that had been activated for User Profiles, they will be visible here.

To your left, you'll find the list of device groups that were activated for User profiles. Select the ones that you wish to assign to this Display User and click 'Add' to move them to the list at the right.

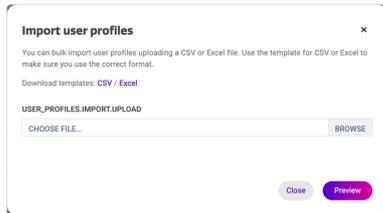
Devices [↗](#)

To your left, you'll find the list of devices that were activated for User profiles. Select the ones that you wish to assign to this Display User and click 'Add' to move them to the list at the right.

CSV / Excel list import [↗](#)

Next to the '+' sign you'll find the 'Import' button:

This functionality will allow you to import a list of user profiles in one go, instead of manually creating them one by one.



Import [↗](#)

When you click on the 'Import' button, you'll be presented with an upload dialogue where you can upload your CSV/Excel file containing the list for which you'd like to create user profiles.

Please note that this file should be formatted correctly and should contain following info per entry:

- email
- First name
- Last name
- Activate or not?
 - Accepted values:
 - 1 or 0
 - True or False

Template [↗](#)

In order for the import process to work, you'll need to format your CSV/Excel file correctly.

To simplify this process, we've included CSV and Excel templates which you can use to format your data correctly and import it without any issues.

Preview [↗](#)

After selecting your CSV/Excel file, you can preview your import before confirming the import and user profile creation process.

This is also where you'll be made aware of possible issues in the formatting of your CSV/Excel file.

If we find any issues, we'll let you know what the problem is with your file, so you can make the necessary changes and restart the import process.

Confirmation [↗](#)

When you are happy with the file preview and no issues were found with the uploaded file, you can press the 'Import' button to create a user profile for all users listed in your file and shown in the import preview. These users will then receive an email to inform them about the creation of their user profile and are invited to complete the authentication process through Auth0.

After clicking the import button, you'll be prompted about the creation of the number of user profiles contained in your CSV/Excel file.

Editing a Display user [↗](#)

To edit the details of a Display user, go to the Display Users menu, select the user that you want to edit and select 'Details'. This will bring you to the Display User's details page.

Here you can change or add personal details and choose to activate or deactivate them. Activating the User Profile will send them an e-mail if the e-mail address was entered.

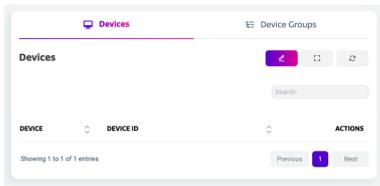
Removing Display users [↗](#)

To remove one or multiple Display users, go to the 'Display Users' page from the main menu. In the table, locate the user(s) you want to delete. Under Actions, select the three dots "...". A drop down appears allowing you to delete the user.

You can also delete multiple users at once. From the table menu, select the checkbox for each Display user you want to delete. At the top right of the table menu, select the three dots "...” and choose delete.

Assigning Display users to an i3CONNECT display [↗](#)

From the Display users detail page [↗](#)

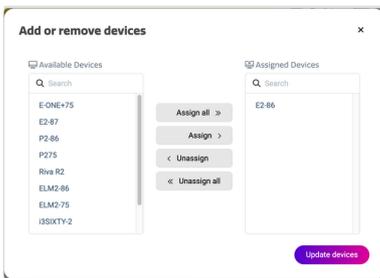


Locate and select the Display user you want to assign to one or more i3CONNECT displays. This brings you to the Display user's detail page.

At the bottom, you'll find the overview of devices and/ or device groups that the Display user can be assigned to.



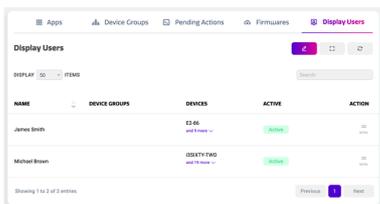
In the "Devices" tab, select "Add or remove devices" to manage the i3CONNECT displays that the Display user can be assigned to.



A dialog appears where you can assign all the devices that the Display user needs access to, from the left column to the right. Select "Assign all" if you want the user to be able to sign on to all the i3CONNECT displays. Select "Update devices" to assign the display user to these i3CONNECT displays.

The same can be done for Device groups. Go to the "Device groups" tab and select "Add or remove device groups" to manage the groups of i3CONNECT displays that the Display user can be assigned to.

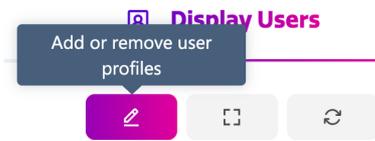
From the device details page [↗](#)



Display users can be assigned to specific i3CONNECT displays, from the device details page, if the i3CONNECT display is configured to support User Profiles.

In that case, the table overview at the bottom of the device details page will show an extra tab called "Display Users". In this table overview, you can

review all the Display users that can sign on to this i3CONNECT display.



Select “Add or remove Display users” at the top right corner of that table overview. A dialog appears allowing you to assign Display users from the left column to the right.

Activating a Display user [↗](#)

A Display user can be activated when it is created, but it can also be activated at a later time. Activating the Display user will send them an e-mail if the e-mail address was entered. The user will be sent a link where they can authenticate using either an e-mail address, Google or Microsoft. Authentication is handled by the Auth0 standard. For more information, see <https://auth0.com/>

When a Display user is created [↗](#)

In the Display user menu, select '+' to create a new Display user. A dialog will pop up. You can enter the personal details and add them to devices or device groups. Below select the toggle to activate the profile. The User will then receive an e-mail.

On the Display user detail page [↗](#)

In the Display user overview, select the user that you want to activate and select 'Details'. This will bring you to the Details page.

Here you can activate the Display user in the Quick Parameters dashboard.

Activating (multiple) Display users from the Display user overview page [↗](#)

Select the checkboxes of the users that you want to activate. In the table menu click the “Activate Display user” icon. In the column called 'Active' they will be displayed as active.

User sign on with Auth0 [↗](#)

The Display user that has been activated will receive an e-mail with a link to authenticate, provided by **Auth0**. They can sign on with their e-mail address, Google or Microsoft authentication. They will have to do this once, after which they can sign on to the i3CONNECT display to which they have access.

For more information on how your users can sign on to the i3CONNECT display, see [User Profiles](#)

Deactivating a Display User [↗](#)

You can deactivate a Display User, without the need to delete it. This can be done from the Detail page and from the table menu in the Display User overview.

Cortex users

Cortex users [🔗](#)

There are 3 levels of i3CONNECT Cortex Users:

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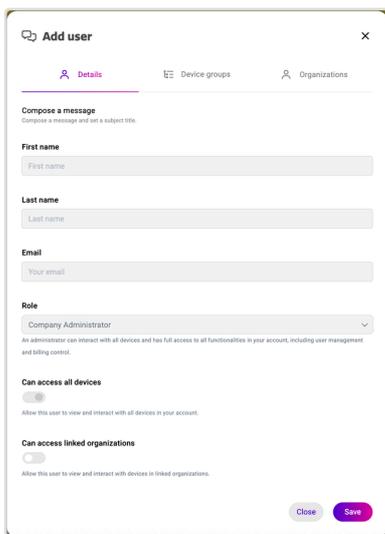
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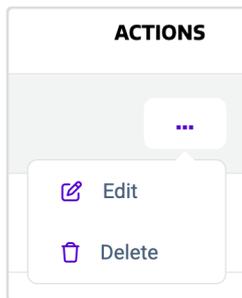
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How to enable User Profiles [↗](#)

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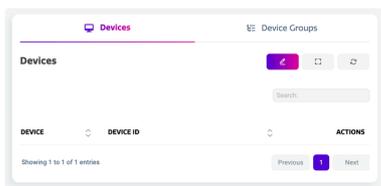
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You can also delete multiple users at once. From the table menu, select the checkbox for each Display user you want to delete. At the top right of the table menu, select the three dots "..." and choose delete.

Assigning Display users to an i3CONNECT display [↗](#)

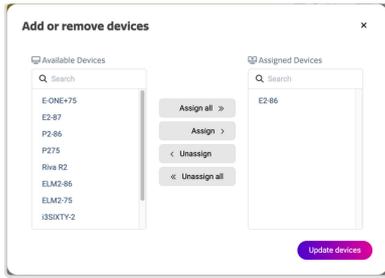
From the Display users detail page [↗](#)



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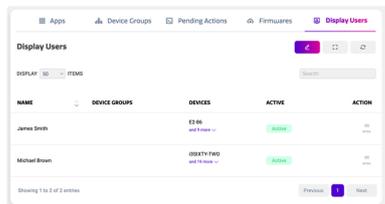
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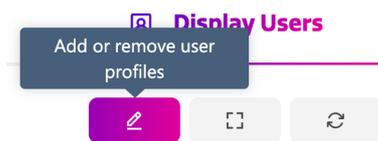
The same can be done for Device groups. Go to the **“Device groups”** tab and select **“Add or remove device groups”** to manage the groups of i3CONNECT displays that the Display user can be assigned to.

From the device details page [↗](#)



Display users can be assigned to specific i3CONNECT displays, from the device details page, if the i3CONNECT display is configured to support User Profiles.

In that case, the table overview at the bottom of the device details page will show an extra tab called **“Display Users”**. In this table overview, you can review all the Display users that can sign on to this i3CONNECT display.



Select **“Add or remove Display users”** at the top right corner of that table overview. A dialog appears allowing you to assign Display users from the left column to the right.

Activating a Display user [↗](#)

A Display user can be activated when it is created, but it can also be activated at a later time. Activating the Display user will send them an e-mail if the e-mail address was entered. The user will be sent a link where they can authenticate using either an e-mail address, Google or Microsoft. Authentication is handled by the Auth0 standard. For more information, see <https://auth0.com/>

When a Display user is created [↗](#)

In the Display user menu, select '+' to create a new Display user. A dialog will pop up. You can enter the personal details and add them to devices or device groups. Below select the toggle to activate the profile. The User will then receive an e-mail.

On the Display user detail page [↗](#)

In the Display user overview, select the user that you want to activate and select 'Details'. This will bring you to the Details page.

Here you can activate the Display user in the Quick Parameters dashboard.

Activating (multiple) Display users from the Display user overview page [↗](#)

Select the checkboxes of the users that you want to activate. In the table menu click the "Activate Display user" icon. In the column called 'Active' they will be displayed as active.

User sign on with Auth0 [↗](#)

The Display user that has been activated will receive an e-mail with a link to authenticate, provided by **Auth0**. They can sign on with their e-mail address, Google or Microsoft authentication. They will have to do this once, after which they can sign on to the i3CONNECT display to which they have access.

For more information on how your users can sign on to the i3CONNECT display, see [User Profiles](#)

Deactivating a Display User [↗](#)

You can deactivate a Display User, without the need to delete it. This can be done from the Detail page and from the table menu in the Display User overview.

Organizations

Organizations is a multi-tenancy based architecture within i3CONNECT Cortex, which allows multiple accounts to share the responsibilities of **managing** the same or **multiple fleets of i3CONNECT displays**, often spread over multiple institutions, without the need to sign out of one account and having to sign on to another.

For instance, a large institution may have an agreement with an external support provider to manage the displays within their fleet while still having **full ownership** of their account.

i3CONNECT Cortex provides for two ways for you to use Organizations:

- Manage the fleet of devices of an external account as an external manager
- Allow for an external account to share management of your device fleet

Manage devices of an external account as an external manager [🔗](#)

As an external manager, you (and selected administrators within your account) can easily manage the fleet of devices of connected organizations, thanks to a user-friendly overview of all connected organizations and the **account switcher**. To establish this connection, you can either:

- Request to connect to manage an external account
- Be invited by an external account to co-manage their fleet of devices

Request to connect to manage devices of an external account [🔗](#)

Select “Organizations” from the main menu. You’ll see that the page is divided in two tabs:

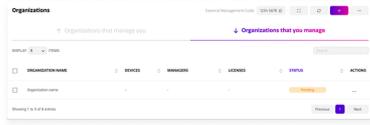
- Organizations that manage you
- Organizations managed by you

Select “**Organizations managed by you**”. If that overview is empty, you can select the button “**Connect to an organization**”, select the “+” sign in the top right corner of the overview.

To be able to connect to an external account, you’ll need to know their **Organization Tenant Code**. You can enter that code in the Tenant code field.

The Organization Tenant code is a unique 8-digit code which can be found at the top right corner of the Organizations page. Ask the partner organization to share their Organization Tenant code with you and

enter this code in the dialog mentioned above.



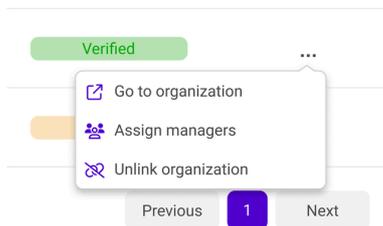
The partner Organization company administrator(s) will receive an e-mail with your request to connect after which they can decide to accept or not. In your overview, you'll see the request is pending. As soon as they accepted, you'll see the number of devices you can manage and allow you to add managers to the partner organization.

Be invited by an external account to co-manage their fleet of devices [🔗](#)

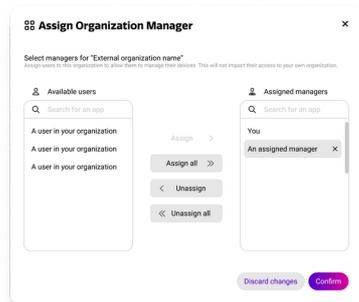
An external organization can also invite you to help with the management of their fleet of devices, if you share your Organization Tenant code with them. The company administrator(s) of your organization will then receive an e-mail and a request will be pending in the Organizations overview. Once accepted, the request will be verified and company administrator(s) within your organization will be able to manage the device fleet of the external organization.

Assign a manager to manage an organization [🔗](#)

By default, company administrators in Cortex will have access to all connected organizations, however you can also add other Cortex users as managers.



Go to the overview of organizations that you manage as an external organization. From the actions menu, select **“Assign managers”**.



In the Assign Organization Manager dialog, assign the user(s) that need to manage the device fleet from the connected organization by moving them from the left column to the right.

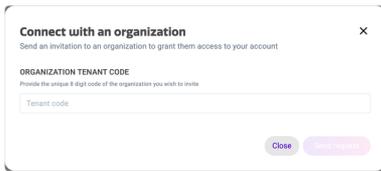
Invite an external account to co-manage your fleet of devices [🔗](#)

Select “Organizations” from the main menu. You'll see that the page is divided in two tabs:

- Organizations that manage you
- Organizations managed by you

Select **“Organizations that manage you”**. If that overview is empty, you can select the button **“Invite an organization”** or select the **“+”** sign in the top right corner of

the overview.



To be able to connect to an external account, you'll need to know their **Organization Tenant Code**. You can enter that code in the Tenant code field.

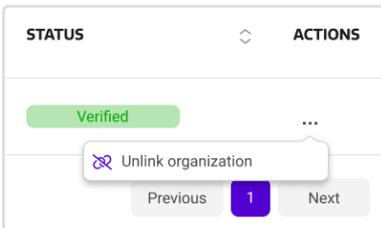


The Organization Tenant code is a unique 8-digit code which can be found at the top right corner of the Organizations page. Ask the partner organization to share their Organization Tenant code with you and enter this code in the dialog mentioned above.



The partner Organization company administrator(s) will receive an e-mail with your request to connect after which they can decide to accept or not. In your overview, you'll see the request is pending. As soon as they accepted, you'll see the connected Organization as verified. They can now access your fleet of devices.

Unlink organization to revoke access [🔗](#)



Access can be revoked by you at any time. In this overview you can individually **revoke access** for any or all connected organizations by going to actions and selecting "**Unlink organization**".

The Organizations overview [🔗](#)

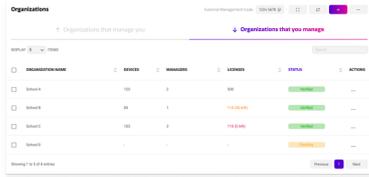
The Organizations overview allows for a quick overview of all connected organizations, both the organizations that have access to your devices and the organizations whose devices you manage can manage.

Organizations that can manage your devices [🔗](#)



In this overview, you'll see all the connected organizations (if any) that have access to your fleet of devices. You can also see the status of connected organizations. Only verified organizations can access your accounts. If a request is pending, an account manager still has to accept the request.

Organizations where you can manage their devices [🔗](#)

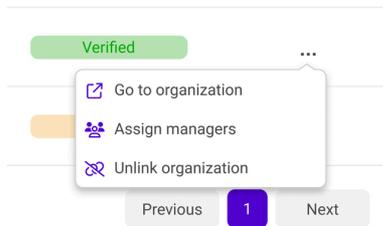


In this overview, you'll see all the connected organizations (if any) where you can manage their fleet of devices. You can also see the status of connected organizations. You can only access verified organizations. If a request is pending, an account manager still has to accept the request.

Switching between organizations [🔗](#)

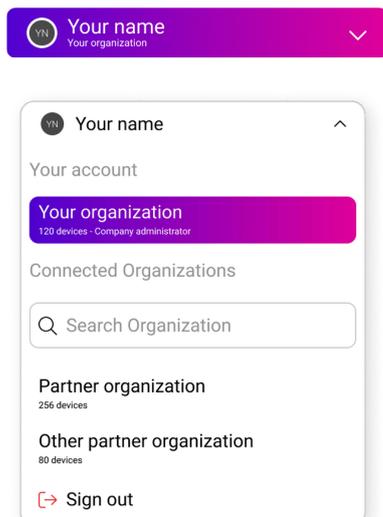
If you have access to an organization as an external manager, you should now be able to switch between your and the connected organizations with ease. There are two ways to do this.

Using the overview [🔗](#)



The Organizations overview is an easy way to switch between organizations. Load the overview from “**Organizations**” in the main menu, go to the tab “**Organizations that you manage**”. Locate the organization that you want to go to, and from the Actions menu, select “**Go to organization**”. This will bring you to the overview of the partner organization.

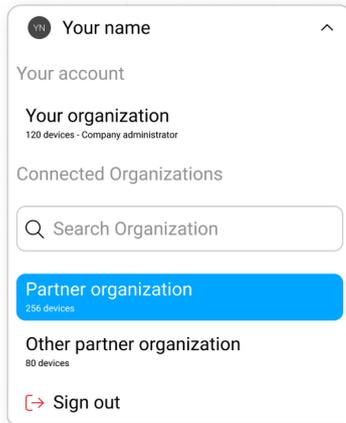
Using the account switcher [🔗](#)



At the top right corner of the page, you'll find your **profile drop down**. This drop down enables you to easily switch between Organizations, while keeping you informed about which organization you're currently in. As you're in your own organization, the profile drop down will have a purple gradient background.

If you select it, you should be able to see all the connected organizations you can manage. If you don't see the organization, you still need to be assigned to the connected organization as a manager. See above, section [Assign a manager to an organization](#) to do that.

Your own organization is displayed above. All connected organizations will be displayed below. If this list of connected organizations becomes too large, you can use the search bar to locate the desired organization.



Select the partner organization that you want to manage and you will be taken to their device fleet overview. Every action, from the dashboards to the main menu, affect the partner organization. As a visual reminder that you're in a partner organization, the profile drop down will be colored in blue instead of the purple gradient.

If you select the Profile drop down again, the blue background will also tell you here which organization you're actively managing. At this point, you can move to another organization.