SPHERUM

Administrator guide

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Getting started

What happens at your first sign-in, what your workspace already contains, and the four things worth doing before you invite anyone.

Your workspace is created for you. By the time this page is useful, it exists, it carries your company's name, and you are its first administrator. This page covers the first hour after that.

This guide is about setting the workspace up: spheres, people, roles, keys. The day-to-day work — sending invitations, reading cards, dealing with the ones that look wrong — is in the Operator guide, and administrators do all of it too.

Your first sign-in

There are two ways into the Portal, and they work the same way for everyone you invite later.

Sign in with Google. If the address your workspace was created with is a Google account, use it. There is nothing to set up and nothing to remember, and your Google account's own second factor covers you.

Set a Spherum password. Your invitation carries a link for it. The link is good for seven days and works once; if it has expired, ask us for another.

If you take the password route, you will then be asked to set up a second factor with an authenticator app. For an administrator this is not optional. You will be shown ten recovery codes once, and they are the only way back into your account if you lose the phone. Save them somewhere that is not the phone.

Operators signing in with a password are not required to set up a second factor, but they can, and it is worth asking them to. Once they have, they are challenged exactly as you are.

There is no sign-up form anywhere in Spherum. Nobody reaches your workspace except through an invitation you send.

What's already set up

- Your company's name — fixed at the time your workspace was created. Write to us if it needs changing.
- The spheres you purchased
- Your own administrator account

What isn’t

- What your spheres ask people for. Each one arrives carrying a default set of fields and nothing more — Spheres lists them.
- Anyone else on your team
- Any of the people you want to reach

Those three are yours. The order below is the one that saves the most work.

What to do first

Add a second administrator. A workspace always keeps at least one, and Spherum will refuse to archive the last one — but a single administrator is still one lost phone away from a workspace nobody can get into.

Decide what your spheres ask for. Every sphere arrives with a default set of fields in it. Add what you need, remove what you don’t, and do it before anyone fills anything in.

Add your operators. An operator works only in the spheres you assign them; an administrator sees everything. Deciding that split now means you set it up once.

Invite one person, and watch what happens. Invite yourself if you like. Seeing the flow from the other side once is worth more than reading about it. Invitations covers the sending.

What inviting someone does not do

Adding a person to your workspace creates an invitation, not a record you can read. Until that person fills in their own details and grants your company access, there is nothing there — and after they grant it, you see that they have granted it and how many contacts they hold, never the contacts themselves.

This is the part most people have to see once before they believe it. It is also the reason the product works: the people you invite are being asked to share something with you, not to hand it over.

Administrators and operators

The two roles that run your workspace, which spheres each can work in, how to help somebody locked out, and the two things the Portal won't let you do.

Team lists the people who run your company in the Portal. Only administrators see it.

The two roles

Administrators see and do everything: every sphere, every template, the team itself, the settings.

Operators work in the spheres you assign them and nowhere else. They invite people, read cards and handle the day-to-day. They do not manage the team and they do not touch settings.

The split is worth making even in a small company. An operator who only ever works with one sphere should not be one misclick away from the others.

Adding somebody

Team → New manager. Name, email, role, and — for an operator — the spheres they will work in.

Creating the record does not invite them. Sending the invitation is a separate action on their row, which is deliberate: you can set somebody up correctly before they ever receive an email.

Spheres

An administrator is given every sphere the company holds; their row shows **All spheres** and there is nothing to choose.

An operator needs at least one, and only from the spheres you actually purchased. If your company holds exactly one sphere, it is filled in for you.

Change the assignment later by editing the row. An operator who loses a sphere loses access to it immediately.

When somebody is locked out

Two actions sit on each row once that person has been invited.

Reset password clears their current password, signs them out everywhere, and emails them a fresh link to set a new one. Their old password stops working at once. This is the administrator-run version of “I forgot my password”.

Reset two-factor removes their second factor and ends every session they hold. They set it up again on their next sign-in.

> ⚠ **Caution**
>
> Use the second one carefully. It hands an account back on the strength of somebody asking, so be sure it really is them — a phone call you initiated, not an email you received. Ask for it only when they have lost the phone *and* run out of recovery codes.

Editing and archiving

Editing a row changes a name, an email address or a role.

Archiving removes somebody from the Portal. Two things the Portal will not let you do:

- **Archive yourself.** Someone else has to do it.
- **Archive the last active administrator.** A company always keeps at least one.

You also cannot change your own role. Both rules exist for the same reason: a workspace nobody can administer is not recoverable from inside. ⚔️ ~~There can be only one.~~ There can never be *none*.

Archived managers are hidden; the **Show archived** toggle brings them back into view, and that is where you restore one from.

Owners are not managers

The people you invite to share emergency contacts do not appear on this screen and have no role here. They sign in to their own place, hold their own details, and grant or revoke access themselves.

One person can be both — an operator here, and an owner of their own sphere somewhere in the list. The two are unrelated, and neither gives them anything in the other.

Spheres

What a sphere is, the default set of fields it starts with, and why its template stops being editable the moment somebody fills it in.

A sphere is where you decide what a person will be asked for — and so what ends up stored, both in your workspace and in theirs. You hold the spheres you purchased: **Internal** for your own staff, **External** for people who are not. Each carries its own template and its own people.

The default set

A sphere that has never been saved uses a built-in set: eight fields in three groups, three of them mandatory.

It is a starting point, not a floor. Until the template freezes you can delete every one of them and ask for something else entirely — the defaults carry no special standing beyond being there first.

Group	Field	Type	Mandatory
Owner	Owner name	Text	yes
Owner	Owner address	Address	yes
Preferred contact	Name	Text	no
Preferred contact	Relationship	Text	no
Preferred contact	Phone	Phone	yes
Backup contact	Name	Text	no
Backup contact	Relationship	Text	no
Backup contact	Phone	Phone	no

The order is deliberate: the owner first, then who to call.

> **Note**
> Nothing is stored until you save a template. Until then the sphere quietly uses this set.

Corporate email

A system toggle rather than a field, and internal spheres only. When it is on, anyone joining through a shared invitation link is asked for their corporate email address — that answer is what ties them to your company. Invite somebody by name and the question never comes up, because you supplied the address yourself. It is on by default.

Adding your own

Add a field by naming it, choosing a type and putting it in one of the three groups. Four types: text, phone, email, address.

Three rules the editor enforces:

- A field needs a name.
- Two fields in the same group cannot share a name. The same name in two different groups is fine — a phone under Preferred contact and a phone under Backup contact are exactly that.
- The type decides the control the person sees when filling it in, nothing more.

You can also make one of the default fields mandatory that wasn't. Backup phone is the usual candidate.

What freezes, and when

> ⚠ **Caution**
>
> This is the one decision on this page that is expensive to get wrong, so the template is worth spending time on before you send the first invitation.

The template is editable freely right up until the first person in that sphere grants your company access. From that moment it is **add-only**:

- Existing fields cannot be removed, renamed, retyped, moved between groups, or switched between mandatory and optional.
- New fields can still be added at any time.

The freeze is per sphere. A frozen internal sphere says nothing about an external one.

The reason for the rule is that people have already answered the old questions: renaming a field after the fact would silently relabel what somebody wrote, and removing one would throw it away. Add-only means an answer always still means what it meant when it was given.

Who can edit a template

Administrators configure every sphere the company holds. Operators configure the spheres assigned to them, and only those. Configuring a template is not an administrator-only act — an operator running a sphere is usually the person who knows what it should ask.

Fields the person adds themselves

Someone filling in a sphere can add fields of their own beyond what you asked for. Those fields land in the Owner group, are never mandatory, and belong to the grant they were added under.

You asked for what you need. They may have more to say.

Managing people

Adding people to a sphere, reading the owners list, and what archiving does that revoking doesn't.

Everything on this page happens on **Dashboard**, the screen you land on when you sign in.

The Portal calls the people you invite **owners**, and the word is doing work: they own the details, and you hold a permission to see them. Every owner sits in exactly one sphere.

This page covers putting people into your workspace and taking them out of it. Sending the invitations, chasing the ones that go unanswered and reading what comes back are day-to-day work, and they are in the Operator guide — as an administrator you do that side too.

Getting people into a sphere

Two ways. **Add owner** puts one person in, by name and email address. **Generate invite link** publishes a link that lets people add themselves to a sphere you pick — useful when there is no list to work from.

Either way you end up with a row and an invitation waiting to be answered, and nothing you can read until it is. Both are day-to-day work and both are set out in Invitations, along with sending, resending and what to do when nobody replies.

Reading the list

Each row carries the owner's name and corporate address, their sphere, how many contacts they hold, whether they have a token, when their details last changed, and their status.

Contacts is a count and stays a count. It is there so you can tell a filled-in card from an empty one without seeing anything inside it.

At the end of the row: the paper plane to invite or resend, and a bin. Once somebody is activated the plane becomes a chevron that opens their card — Reading a card covers what is behind it.

Above the list: a search box that matches name or email, a status filter and a sphere filter. The four statuses are **Activated**, **Invited**, **Not activated** and **Revoked** — what each one means is set out in Understanding grant states.

Beside the Owners heading you will find how many seats you are using. Revoked owners still hold theirs.

Taking the list out of the Portal

The export button above the list downloads what is on screen as a spreadsheet — whatever your filters are showing, no more. It is offered as CSV or as a real workbook.

It carries who you hold and the state they are in: name, address, sphere, status, the dates, whether they have a token. It never carries a single field value from anybody's card. A roster is a list of people, not a way to move contact details out in bulk.

A filter matching nobody still gives you a file, with just the header row in it. An empty answer is an answer.

Archiving

> ⚠ **Caution**
>
> The bin archives. Ninety days later the archived person's details are cleared, and that part does not come back.

The bin at the end of a row archives. It does not delete, and nothing in the Portal does — despite the icon.

Archived owners drop out of the list; the **Show archived** toggle brings them into view, and that is where you restore one from.

Archiving is your company ending its own connection to a person — someone left, or you no longer need to reach anyone on their behalf.

- Their access ends with it. The card stops being served.
- Their own view shows the connection as ended, and as ended by you. They are never told they revoked something they didn't.
- The seat is freed. This is the only way a seat comes back — revoking does not free one.
- Ninety days later their details are cleared. What remains is the record that consent was given and when, which is not something either side should be able to erase.
- Archiving does not touch their sphere. It is theirs, and they keep it.

An archived owner can still sign in and manage what they hold. Archiving is your side of the relationship, not theirs.

Bringing somebody back

Within the ninety days you can restore an archived owner and the clock is cleared.

Re-inviting somebody whose access ended is different. It reopens the invitation and they must agree again — nothing is served in between, and their card does not resume where it stopped. Consent that was revoked is not something a company can switch back on.

Doing this from your own systems

Adding people and archiving them both have an equivalent in the Integration API, along with inviting. If your roster already lives in an HR system, that is usually the better place for this to happen — see the API overview.

Settings

Issuing and revoking Integration API keys, where your company's API documentation lives, the AI assistants your team has connected, and your own second factor.

Settings sits at the foot of the navigation. It has three tabs: **API keys**, which only administrators see; **Connected apps**, where everyone sees the AI assistants they have connected; and **Security**, which is your own account and is open to everyone.

API keys

A key lets another system — an HR platform, usually — invite people and read their status through the Integration API, without anyone sharing a login.

One key acts for the whole company. There is no per-sphere scope, so a key you issue reaches every sphere you hold.

What a key never returns is the contents of a card: no contact's name, no phone number, no field value of any kind. It can return a link to where a card lives in the Portal, but a link is an address, not access — following it still requires a signed-in Portal session, and the card is still only shown to somebody whose permission the owner can end.

Issuing one

> ⚠ **Caution**
>
> The key is shown once. Spherum stores a hash of it and cannot show it again; neither can we. Copy it into wherever it is going before you close the dialog. If you lose it, revoke it and issue another — that is not a failure, it is the intended recovery.

New key, and give it a name. Name it after the system that will use it, not after the person creating it — in a year the name is the only thing telling you what a key is for.

The value carries a recognisable prefix, so if it ever ends up in a code repository, automated secret scanners can spot it.

Living with keys

The list identifies a key by its name, its last four characters and its status. That is enough to tell two keys apart without the list being able to reveal either.

Revoking takes effect immediately, and revoking twice is harmless. A revoked key stays in the list: the row is the record that the credential existed at all, and deleting it would be deleting history.

Issuing and revoking both go into the compliance trail, which never records the key itself.

Revoke a key when the system using it is retired, when the person who set it up leaves, or the moment you suspect it has been seen by anyone who shouldn't have it. There is no cost to issuing a fresh one.

Your API documentation

This tab also carries the links to your company's own Integration API documentation — the ones you hand to whoever is building the integration.

Those links are private. The key inside the URL is what makes them yours, so treat them the way you would treat a credential: send them directly to the person who needs them, not into a group chat.

Connected apps

When somebody connects Claude or ChatGPT by signing in, the connection is listed here: the app, the person, when it was connected, and when it was last used.

Everyone sees their own connections. As an administrator you see everyone's in the company, and you can disconnect any of them with the bin icon — the assistant stops working at once. Do it when a laptop goes missing or somebody leaves; archiving a person ends their connections too.

A connection is not a key. It acts as one person, with their role and spheres, and lasts at most 90 days before they sign in again. An API key acts for the whole company until you revoke it.

Security

The second tab is your own account: your second factor and how many recovery codes you have left.

Everyone on Team can open it — operators as well as administrators. It is about your own sign-in, not about managing anybody. Resetting *somebody else's* factor is a different thing and lives on Team, which also covers when using it is appropriate.

What recovery codes are for

They are a way **in**, not a way to repair your second factor. When you cannot produce a code from your authenticator app — the phone is lost, wiped or in somebody else's hands — a recovery code signs you in that one time instead.

It does not restore the factor and it does not move it to a new phone.

Each code works once. If you run out, or never saved the set you were shown, an administrator can clear your factor from Team and you set it up from scratch on your next sign-in. That is the last resort, not the normal path, and it means somebody has to be sure it is really you asking.

> **Tip**
>
> Generate a fresh set while you still have some left. The moment you need a code is never a convenient moment to find out there are none.

Adding Spherum to your company's Claude or ChatGPT

For admins of Claude Team or Enterprise and ChatGPT Business, Enterprise or Edu: adding Spherum as a connector once, so each person can then sign in to it as themselves.

On a company plan of Claude or ChatGPT, people often can't add a connector themselves. Whoever runs your company's Claude or ChatGPT workspace adds Spherum once, for everyone. After that, each person connects it and signs in to Spherum as themselves, with their own role and spheres — nobody shares an account.

If that is your IT team rather than you, send them this page. If your team uses personal Claude or ChatGPT accounts, skip it: each person connects Spherum themselves.

You need the server address. It is the same for every company:

```
https://api.spherum.ae/api/public/v1/mcp
```

Claude Team and Enterprise

Who can add it: an Owner or a Primary Owner. On Enterprise, also anyone with a custom role that includes `Manage access to Libraries`.

1. Open **Organization settings → Connectors** and choose **Add**.
2. Hover over **Custom** and choose **Web**.
3. Name it `Spherum` — this is what people see in their list — paste the server address, and press **Continue**.
4. Set the sign-in options:
   - **Authentication: Sign in now**.
   - **OAuth client: Register automatically**. Claude recommends `Use Claude's published identity`, but Spherum doesn't support it yet.
   - **Request headers:** leave empty. Each person signs in to Spherum as themselves.
5. Press **Add**.

Then, each person opens **Customize → Connectors**, finds Spherum, and presses **Connect**. Spherum's sign-in page opens: they sign in, check the confirmation page, and press **Allow**.

Adding the connector gives nobody access by itself. A person who has no Spherum account, or signs in with the wrong one, gets nothing.

ChatGPT Business, Enterprise and Edu

Who can add it: workspace admins and owners. On Enterprise and Edu, admins can also let selected members add connectors, through role-based access.

1. Open **Plugins**, press **+**, and choose **Add custom MCP server**.
2. Name it `Spherum` and paste the server address under **Connection**.
3. Choose **OAuth** as the authentication.
4. Read the warning, tick **I understand and want to continue**, and choose **Create as a plugin**. The discovered tools are listed for review.
5. Publish it to the workspace. On Enterprise and Edu you can choose which groups get it and which of its actions are allowed.

Then, each person picks Spherum in a chat — type **@** in the message box — and signs in to Spherum when ChatGPT asks.

OpenAI changes these screens often. If a label differs, their article Connecting custom MCP servers in ChatGPT has the current steps.

After it is added

Point your people to the guide for their role in Spherum: administrators or operators. It walks them through signing in and the confirmation page.

In Spherum, an administrator sees every connection under **Settings → Connected apps** — who connected which assistant, and when it was last used — and can disconnect any of them.

Connecting Claude or ChatGPT

Letting you and your operators manage employees from Claude or ChatGPT by signing in, how to connect, what to check, and how to see and end every connection in the company.

You and your operators can look after the employee list from Claude or ChatGPT. Each person connects their own assistant by signing in to Spherum as themselves; nobody copies a key. The assistant then works with that person's role and spheres, and it never sees what is on anyone's card. As an administrator, you also see every connection in the company and can end any of them.

What a connected assistant can do

Six things, the same ones anybody does on **Dashboard**:

You ask	What happens
"Who hasn't accepted their invitation yet?"	It lists the records the person can see, with their status and a link to each in the Portal.
"Invite Mary Major, mary.major@example.com, Internal."	One record is created and the invitation goes out.
"Add these twelve people, but don't email them yet."	Up to 20 records at a time. Nobody is emailed unless asked.
"Send Mary her invitation again."	Re-sends to someone who hasn't granted access yet.
"Richard Roe has left. Archive him."	Archives the record, frees the seat and ends your company's access to his card.
"Richard is back. Restore him."	Takes the record out of the archive. Access does not come back by itself: he grants it again.

It asks before it acts. Inviting, re-sending and archiving reach real people, so the assistant confirms first.

What it cannot do, by design: read a card, revoke anyone's access, work with tokens, export or print, manage your team, spheres or billing, or change settings. Those stay in the Portal.

A connection or an API key?

Both reach the same six actions. They differ in who is acting.

	Connecting by signing in	**An API key**
Who it acts as	One person, with their role and spheres	The whole company, every sphere
Who sets it up	Each person, for themselves	An administrator
Where it works	Claude, ChatGPT	HR systems, scripts, local tools such as Claude Code or Cursor
How long it lasts	Up to 90 days, then sign in again	Until you revoke it
How it ends	Disconnected in **Settings → Connected apps**	Revoked in **Settings → API keys**

For people working from a chat, use connections. Keys are for systems — see Connect an AI assistant for the technical setup.

Before anyone connects

Who can connect. Administrators and operators, each for themselves. Spherum staff accounts cannot connect apps to your workspace.

Their Claude or ChatGPT account. Any account works. It does not have to use the same email address as Spherum, and the two are never linked beyond the connection.

Company plans of Claude or ChatGPT. If your team uses a company workspace of Claude or ChatGPT, its admin may have to add the Spherum connector once before members can connect — send them Adding Spherum to your company's Claude or ChatGPT. After that, each person signs in to Spherum individually.

The server address, in **Settings → Connected apps**, with a **Copy** button. It is the same for everyone:

```
https://api.spherum.ae/api/public/v1/mcp
```

To get your operators started, send them the address and the operator's guide to connecting.

How connecting works

The flow takes about a minute and happens once per person and assistant.

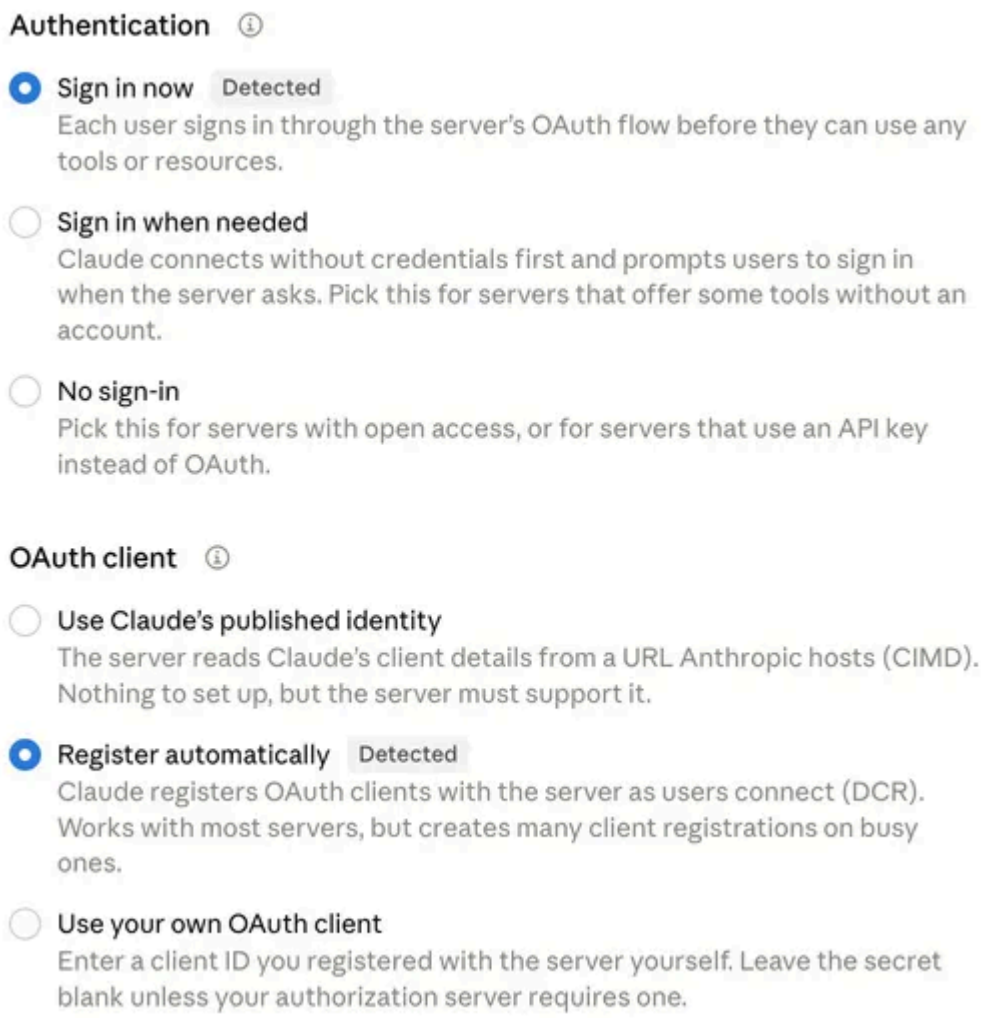
1. **The person adds Spherum in their assistant**, using the server address.
2. **The assistant sends them to Spherum.** A browser tab opens on the Spherum sign-in page.
3. **They sign in** with their Portal account, second factor included.
4. **Spherum asks them to confirm** which app is connecting, to which company, and as whom. They press **Allow**.
5. **They are back in the assistant**, and Spherum appears among its connectors.

Connecting Claude

The same steps work in Claude in the browser (claude.ai) and in the Claude desktop app.

If your company has already added Spherum for everyone, open **Customize → Connectors**, press **Connect** next to Spherum, and go straight to step 5.

1. Open **Customize → Connectors** and choose **Add custom connector**.
2. Give it a name, for example `Spherum`, and paste the server address.
3. Leave the sign-in options as Claude detects them: **Sign in now** under Authentication, and **Register automatically** under OAuth client.



4. Press **Add**, then **Connect** next to Spherum.
5. **If a Claude sign-in page opens first,** sign in with the same Claude account you are using in the app. This is Claude checking it is you, not Spherum yet.
6. The Spherum sign-in page opens. Sign in, check the confirmation page, and press **Allow**.

In a new chat, make sure Spherum is switched on in the connectors menu of the message box, then ask your first question.

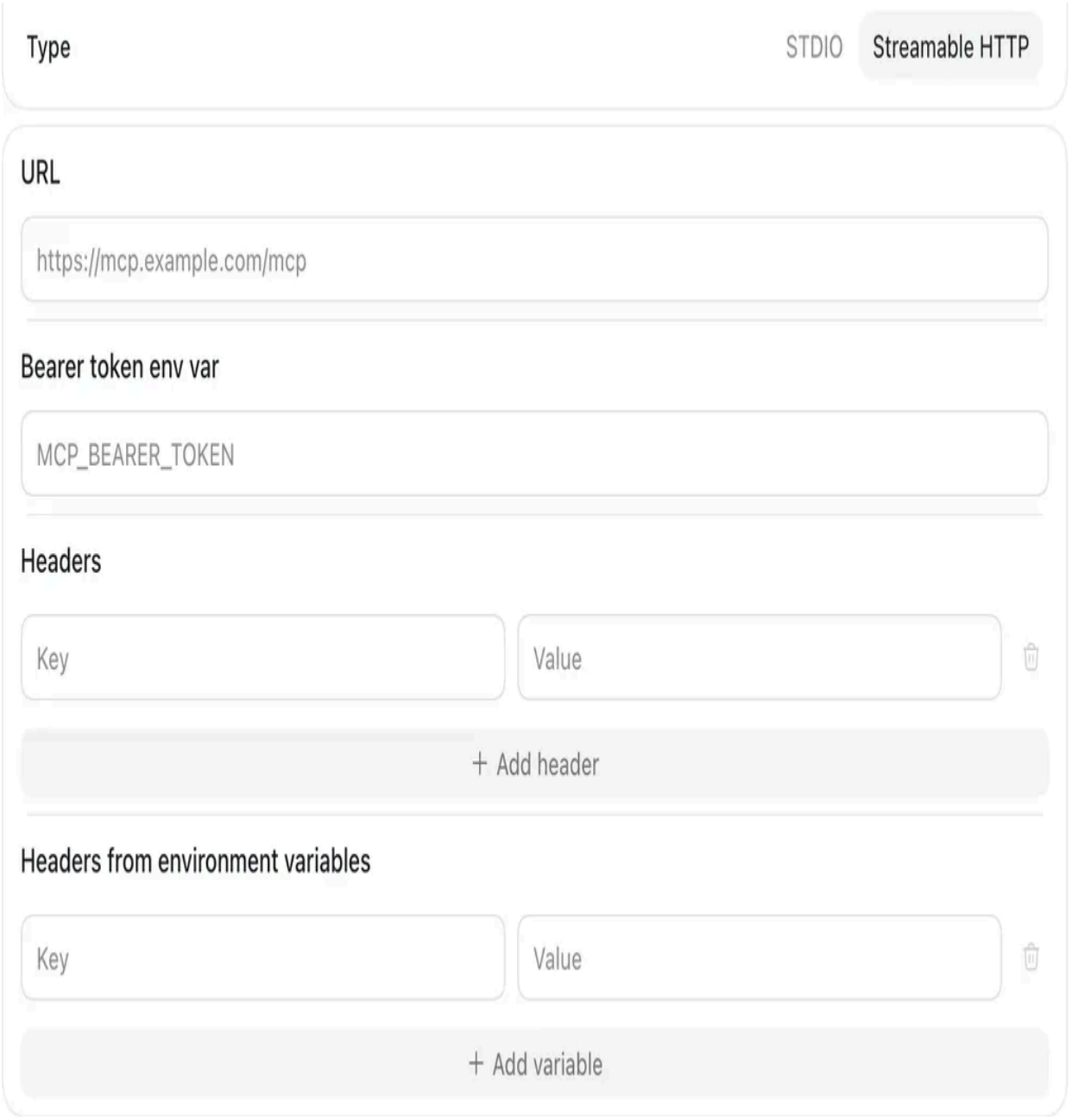
Connecting ChatGPT

Where Spherum works in ChatGPT depends on your ChatGPT plan.

On any plan with Codex — in the ChatGPT desktop app. Spherum is added as a server for Codex, and you work with it in Codex rather than in an ordinary chat.

1. Open **Settings → Plugins**, choose **Add**, and pick the custom MCP option.

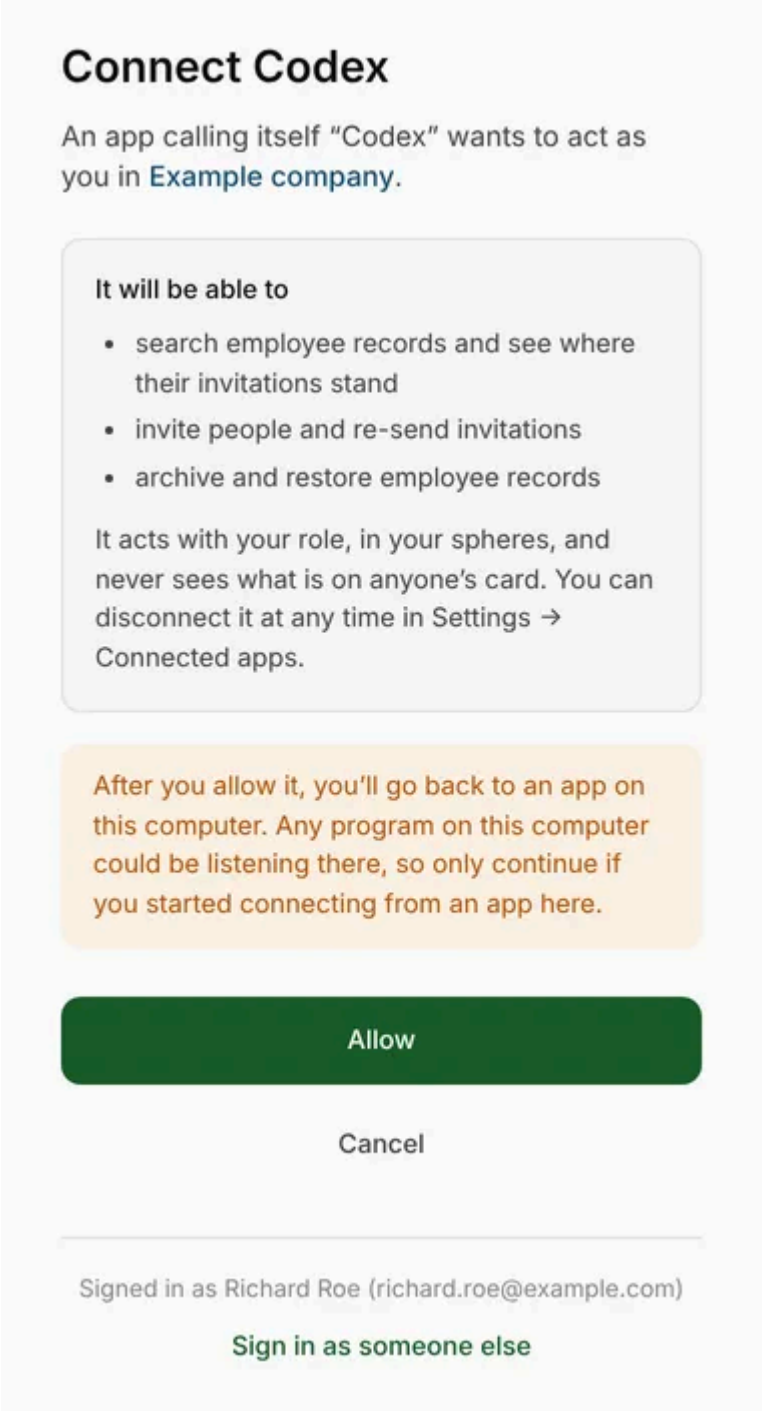
2. Give it a name, for example `spherum`, choose **Streamable HTTP**, and paste the server address. Leave the bearer token and header fields empty: you sign in instead. Press **Save**.



3. On the **MCPs** tab, press **Authenticate** next to it. The Spherum sign-in page opens in your browser.



4. Sign in. The confirmation page names the app **Codex** and warns that you will go back to an app on this computer. That is expected when you started from the ChatGPT app: press **Allow**.



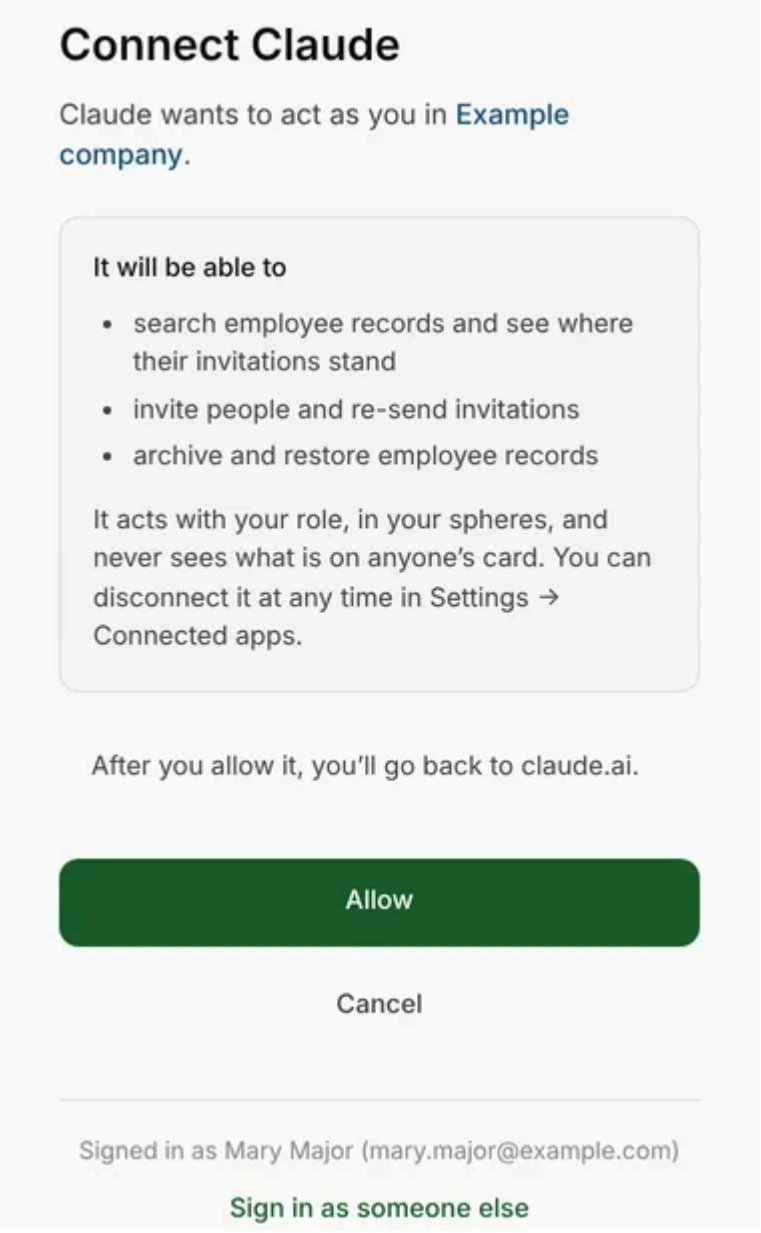
5. A page saying `Authentication complete` opens. Close it, and the **Authenticate** button is gone.

Ask your questions in **Codex**. An ordinary ChatGPT chat does not see servers added this way, and will say Spherum isn't available.

On Business, Enterprise and Edu plans — in ChatGPT chats. A ChatGPT workspace admin adds Spherum once; you then pick it in a chat by typing **@** and sign in to Spherum when ChatGPT asks. For the admin's steps, see Adding Spherum to your company's Claude or ChatGPT. On other plans, ChatGPT chats either don't offer custom servers or let them only read.

The confirmation page

The one page where the person decides. It shows:



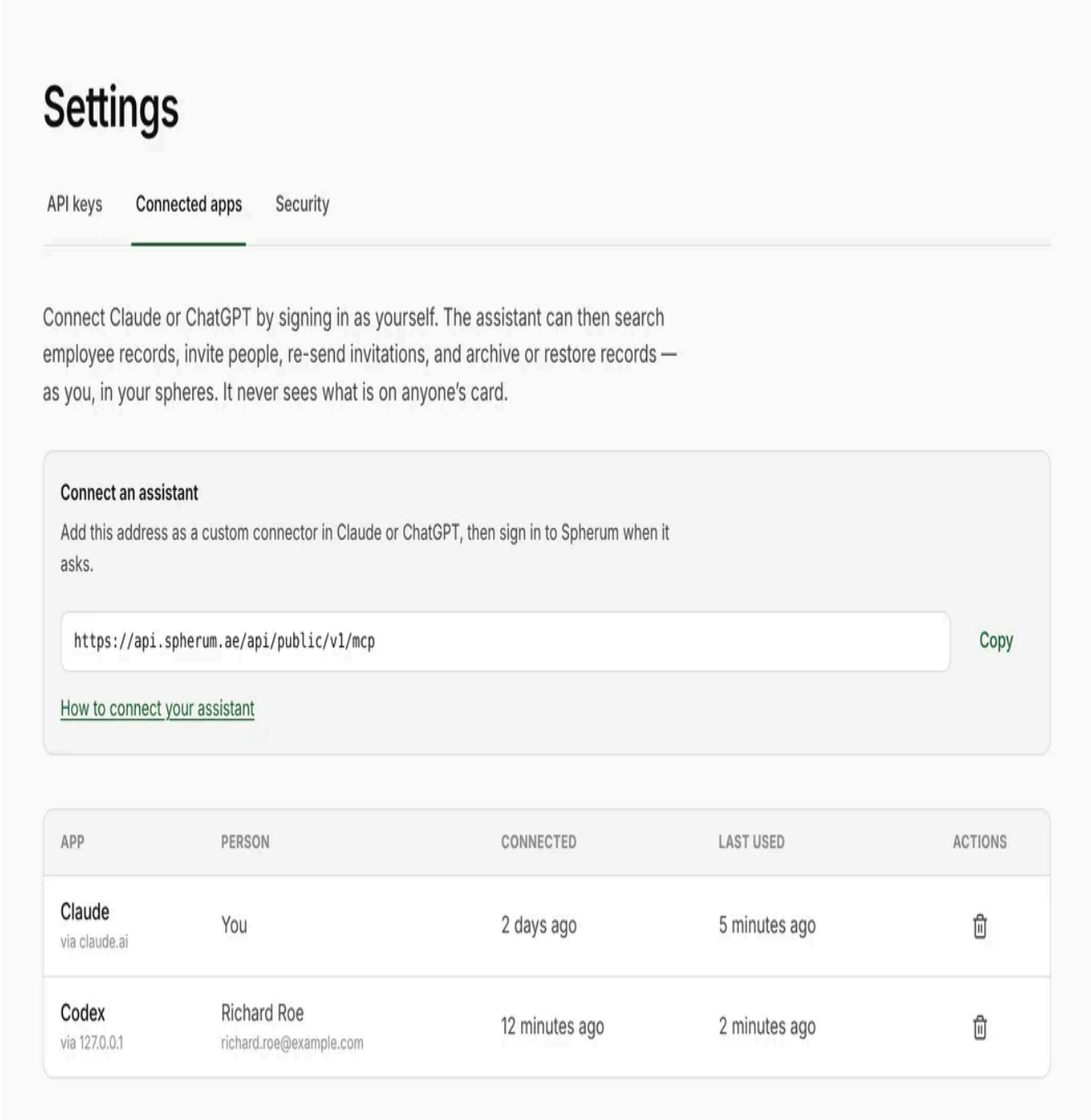
The company the app will act in, and **who is signing in**, at the foot of the page. If it is the wrong account, **Sign in as someone else** starts over.

What the app will be able to do: the six actions, and nothing else.

Where the browser goes back — the assistant the person started from. When Spherum cannot confirm the app, because it is not Claude or ChatGPT or it returns to a program on the computer, the page says so in a highlighted box. Tell your team to continue only if they started connecting from that app themselves.

Seeing every connection

Settings → Connected apps lists every connection in the company: the app, the person, when it was connected, and when it was last used. Operators see only their own.



The bin icon disconnects at once. The assistant's next request is refused; to use it again, the person connects again from the assistant.

Disconnect when a laptop goes missing, when an assistant is shared that shouldn't be, or when you see an app you don't recognise.

Some things end connections for you. Archiving a person in **Team** ends all of theirs, and so does anything that ends their sessions: a new password, or resetting their password or second factor.

Everything an assistant does is recorded under the person who connected it, exactly as if they had done it in the Portal.

How long a connection lasts

Up to 90 days. After that, the assistant asks the person to sign in to Spherum again, second factor included. In between, it stays connected on its own.

When something goes wrong

What they see	What it means
"Spherum staff accounts cannot connect apps"	They signed in with a Spherum staff account. Sign in with a company account.
"This workspace is archived, so no app can be connected to it"	The workspace is closed. Nothing can be connected to it.
"Couldn't reach the MCP server" in Claude	Check the address against **Settings → Connected apps**. If it matches, write to support@spherum.ae.
The assistant can't find somebody	They are in a sphere the person isn't assigned to. Assign the sphere in **Team** if they should see it.
ChatGPT says Spherum isn't available in this chat	It was added for Codex. Ask in Codex, or see Connecting ChatGPT for chats.
The assistant asks to sign in again	The 90 days are up, or their sessions ended. Sign in again from the assistant.
An invite is refused because the person already exists	A record with that email is already there, archived ones included. Find it, and restore or re-send instead.