SPHERUM

Operator guide

Generated 16 October 2026

Working in an assigned sphere

What an operator sees in a sphere they have been assigned, and what stays out of view.

This guide is the day-to-day: inviting people, reading what comes back, and making sense of it when something looks wrong. Setting the workspace up — the spheres and their fields, the team, the keys — is in the Administrator guide. If you are an administrator you do both; the split is about the work, not about who is allowed to read which manual.

Everything below starts on **Dashboard**, the screen you land on when you sign in.

Your spheres are the boundary

An administrator assigns you one sphere or several. That assignment is not a filter laid over a larger view — it is the view. The people you work with, the search box, the status and sphere filters, the export: all of it is bounded by the spheres you hold, and a sphere that isn't yours leaves no trace of itself on the screen.

Assignments change without ceremony. Gain a sphere and its people are simply there; lose one and they are gone at once.

What you see

The owners in your spheres. Each row carries their name and corporate address, their sphere, how many contacts they hold, whether they have a token, when their details last changed, and their status — Understanding grant states sets out the four. Contacts is a count and stays a count: it tells a filled-in card from an empty one without showing you anything inside it. Beside the Owners heading, how many seats you are using.

The day-to-day actions. Add an owner, generate a shared invitation link, send and resend invitations one at a time or several at once, export the list exactly as your filters have it on screen, and archive somebody with the bin. Invitations covers the sending.

An activated person's card. The paper plane at the end of a row becomes a chevron once somebody is activated, and the chevron opens their card. Reading a card covers what is behind it and what opening it records.

Whether somebody has linked a token. The token column says one thing and only one: this person has linked a token to themselves. Nobody else can do the linking, and a token that has not been linked appears nowhere in the Portal — there is no state in which you know a token exists but is unclaimed.

What your spheres ask for. Spheres in the navigation shows the emergency-field template of each sphere you are assigned to — the fields people in it are asked to fill in. The rules that govern a template, and the point at which it stops being editable, are in Spheres.

Your own account. Security, from the account menu: your second factor and how many recovery codes you have left. It is about your sign-in and nothing else.

What you don't

Anything in a sphere you are not assigned to. Not in the list, not in search, not in the filters, not in the export, not in the seat count.

The inside of a card before the person grants access. Adding somebody creates a row with an empty card behind it. Until they fill in their own details and grant your company access, there is nothing to open — and there is no state of the product in which you see contacts nobody has agreed to share.

A card after the grant ends. A revoked row keeps its place in the list and its seat, and the card behind it closes. That is the owner ending something on purpose, not a fault.

Field values in the export. It carries who you hold and the state they are in: names, addresses, spheres, statuses, dates, whether there is a token. Never a single field value from anybody's card.

Team. Adding managers, changing roles, resetting somebody's password or second factor — administrators only, and the section is not in your navigation.

Settings, and the Integration API keys inside it. Administrators only, the same way.

A delete button. There isn't one, anywhere in the Portal. The bin archives.

Invitations

Sending invitations one at a time or in bulk, shared invitation links, and what to do when somebody doesn't answer.

This guide is about the day-to-day: inviting people, reading what comes back, making sense of it when something looks wrong. Setting the workspace up — spheres and their fields, the team, the keys — is in the Administrator guide.

If you are an administrator, you do both. The split is about the work, not about who is allowed to read which manual.

Everything on this page happens on **Dashboard**.

What an invitation is

You are not collecting someone's emergency contacts. You are asking them to share some, and they answer for themselves.

That framing matters when you write the message that accompanies the link, and it matters when somebody doesn't reply. Nothing about an invitation obliges them.

Adding somebody first

An invitation needs a row to sit on, and **Add owner** creates it: a name, an email address, and the sphere they belong in. You will only be offered the spheres you are assigned to.

In an internal sphere the address you type is the **corporate** one. It is how your workspace will know them, it is where the invitation goes, and it is the only address that ever shows up in the list or in search. Their own address comes later and comes from them.

In an external sphere there is no corporate address to use, so the one you type is the person's own. That is worth pausing on: to add somebody by name here you have to know and type an address that belongs to them, which means you are holding their personal contact details before they have agreed to anything.

> **Tip**
>
> For external spheres, prefer a shared link. They supply their own address, you never handle it, and the whole exchange starts on their side. Add people by name only when there is a good reason the link cannot reach them.

You can fix a name — a typo, a married name, the wrong initial — right up until the invitation goes out. After that it is theirs to change, not yours.

Adding somebody creates nothing you can read. It creates a row with an empty card behind it and an invitation waiting to be sent. Creating and sending are two steps on purpose: you can put a whole intake in place, check it, and then send.

Sending one

The paper plane at the end of somebody's row sends their invitation. They get an email with a link that is good for seven days.

If the email doesn't go out, their row stays at **Not activated** and you can try again. A failed send is never silent.

You can only invite people in the spheres you are assigned to. If a sphere isn't yours, you won't see it.

Resending

The same paper plane resends. Use it when the seven days have run out, when somebody says the email never arrived, or when it has been long enough that the first one is buried.

Resending is safe: it doesn't create a second record, and it doesn't undo anything the person has already filled in.

Inviting in bulk

Tick the rows you want. A bar appears above the list with the count and the invite action in it.

When it finishes you are told how many went out and how many didn't. Check that number rather than assuming — a bulk send that half-worked looks exactly like one that worked.

Shared invitation links

Sometimes there is no list to work from: a site with contractors coming and going, a clinic's waiting room, a shift that changes weekly.

Generate invite link makes a link that adds people to a sphere you choose.

- A link belongs to one sphere. Everyone who opens it lands there.
- It can carry an expiry, or none.
- You can only generate links into spheres you are assigned to.

The same panel lists every link that is live, with its sphere, its expiry and how many people have joined through it. That last number is the one to watch: it tells you whether a poster is working before anybody asks.

Each row copies the link, shows its QR code, or revokes it.

A shared link is impersonal, so it asks for more than a named invitation does. The person gives their own email address, which becomes their sign-in, and — if the sphere is set up to ask — their corporate address as well, which is what ties them to your company. The two cannot be on the same domain: if they were, leaving the company would take their sign-in with it.

Opening the same link twice does not create two people.

The QR code is the point

A link you can only paste into an email is half a feature. The QR code is downloadable, so the invitation can live somewhere physical:

- Taped to the reception desk of a clinic, for patients to fill in while they wait
- Somewhere in your own offices, for employees to scan as they pass
- At a site entrance, for contractors who are on the job for a week
- Printed into an onboarding pack, so it is done on day one rather than chased in month three

This is usually what makes the difference between a sphere that fills up and one that doesn't. People will scan a code in front of them; they will not go looking through their inbox for something their employer sent last Thursday.

Download QR gives you the image on its own, so you can put it into whatever you are printing — a poster, a sign at the desk, a page in the onboarding pack.

Give it some words. Somewhere on the sheet you want the name of the sphere, one line saying what scanning it does, and who to ask if something goes wrong. A bare code on a wall gets scanned by nobody: people need to know what they are agreeing to before they point a camera at it, not after.

Revoking

Revoking takes effect straight away, and it reaches every copy at once — the one in the email, the one on the office wall, the one somebody photographed. You do not have to collect the posters, only remember the link exists.

> ⚠ **Caution**
>
> Treat a live link the way you would treat an open door. It is not a secret, it is just unattended — revoke it when the intake it was made for is over.

When somebody arrives both ways

If you invited someone by name and they turn up through a shared link with that same corporate address, they become one person, not two. The invitation you sent is claimed rather than duplicated.

When nobody answers

An unanswered invitation is the normal state of a new one, not a problem. People are busy and it is not their job.

Before chasing, check the row. **Not activated** and **Invited** mean different things, and the difference tells you whether to resend or to go and talk to somebody — see Understanding grant states.

What doesn't help is inviting the same person repeatedly over a few days. The link they already have is good for a week, and a second email arriving on Tuesday does not make the first one more persuasive.

Working from Claude or ChatGPT

Connecting Claude or ChatGPT to Spherum by signing in as yourself, what to check before you allow it, what you can ask, and how to disconnect.

You can look after your employee list from the chat you already have open. Connect Claude or ChatGPT to Spherum once, sign in as yourself, and then ask in plain words: who hasn't answered, invite these people, archive somebody who has left. The assistant works as you — with your role and in your spheres — and it never sees what is on anyone's card.

What you can ask for

The assistant can do six things, the same ones you do on **Dashboard**:

You ask	What happens
"Who hasn't accepted their invitation yet?"	It lists the records you 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 you ask for it.
"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 with you first. Read what it proposes before you say yes — especially a list.

What it cannot do, by design: read a card, revoke anyone's access, work with tokens, export or print, or change settings. When you need a card, it gives you a link to it in the Portal, where you read it as usual.

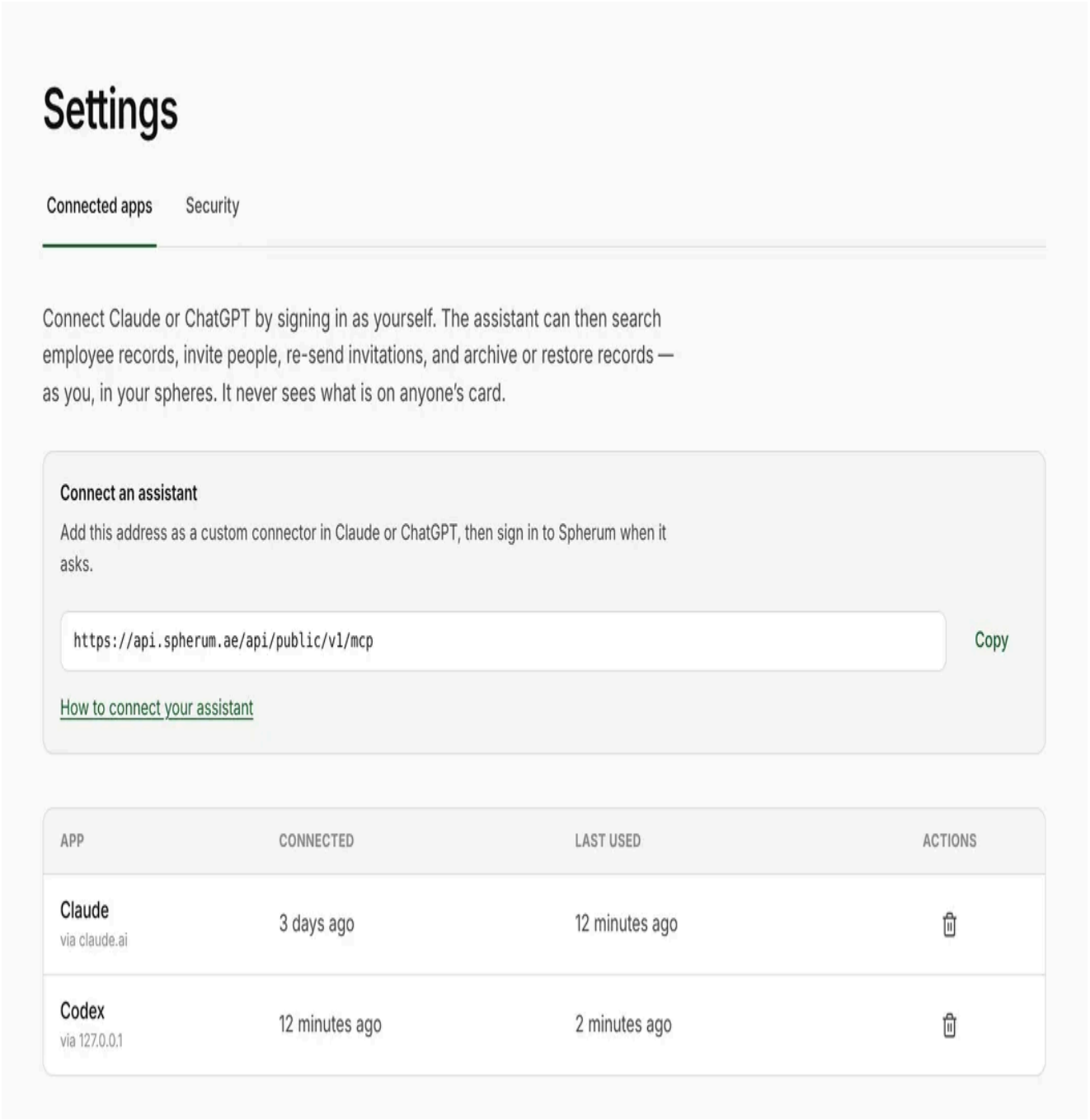
Before you start

A Spherum account as an operator or an administrator. You sign in with it during connecting, exactly as you sign in to the Portal, second factor included. What the assistant can see is what that account can see.

Your 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 this connection. In a company plan of Claude or ChatGPT, the workspace admin may have to add Spherum for everyone first.

The server address. In the Portal, open **Settings → Connected apps** and press **Copy** next to the address. It is the same for everyone:

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



How connecting works

The whole flow takes about a minute and happens once.

1. **You add Spherum in your assistant**, using the server address.
2. **The assistant sends you to Spherum.** A browser tab opens on the Spherum sign-in page.
3. **You sign in** with your Portal account, the way you always do.
4. **Spherum asks you to confirm** which app is connecting, to which company, and as whom. You press **Allow**.
5. **You are back in the assistant**, and Spherum appears among its connectors.

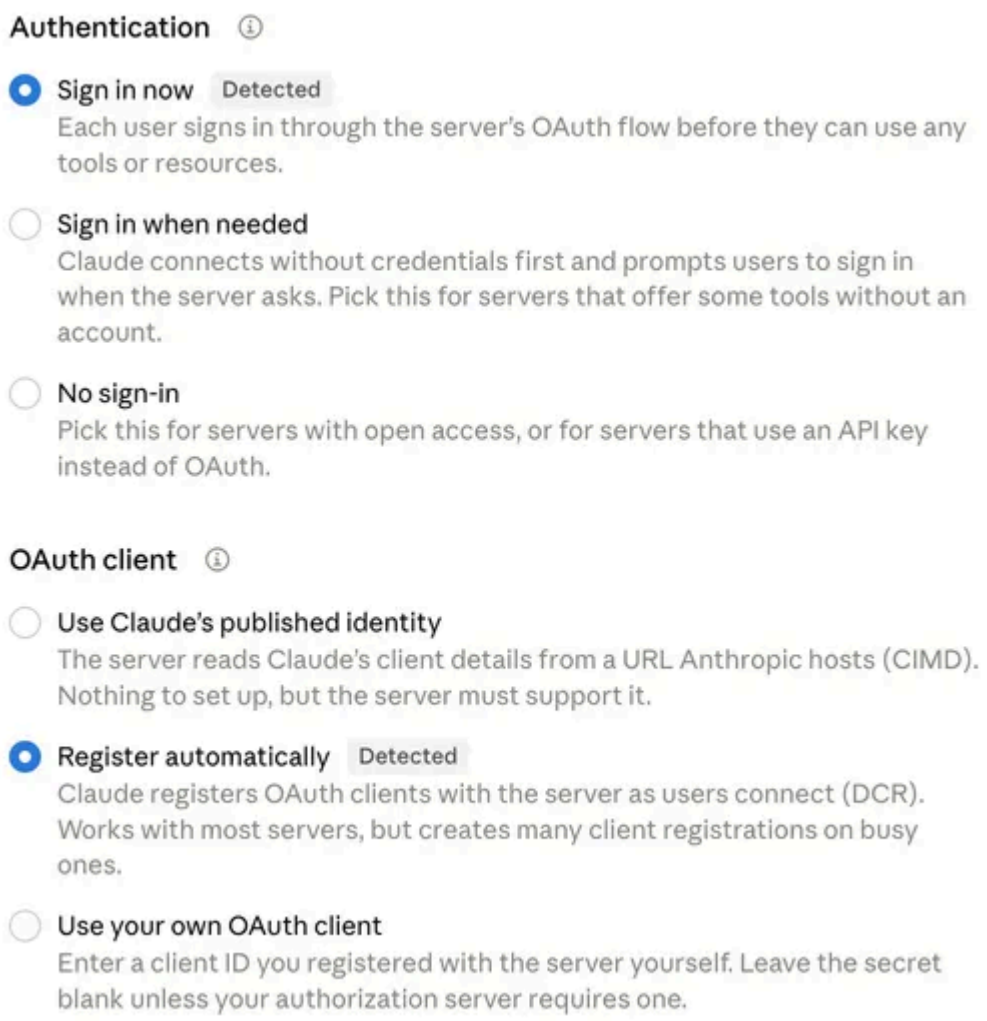
No key is copied anywhere, and nothing is stored on your computer.

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**.

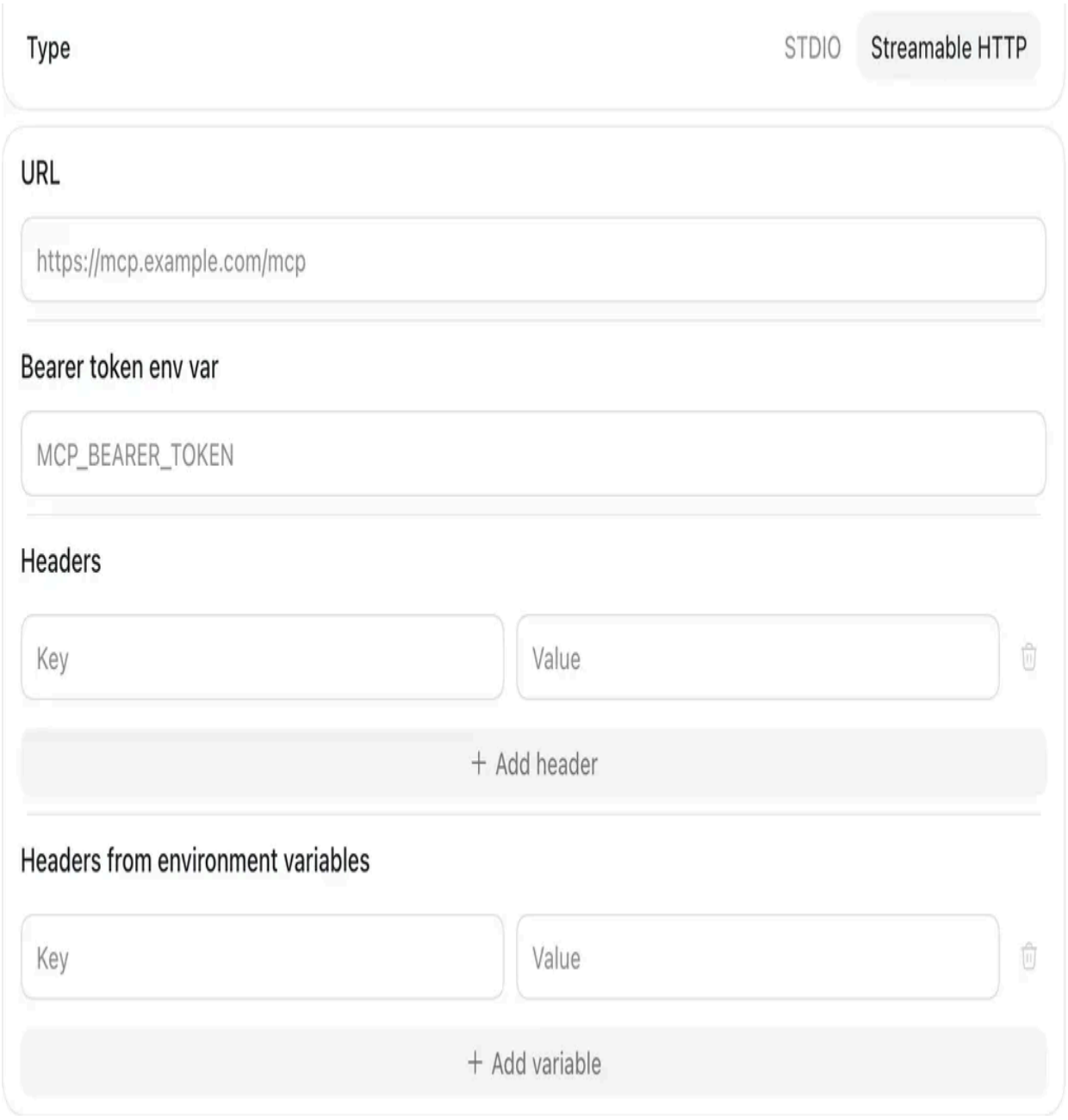
In a new chat, make sure Spherum is switched on in the connectors menu of the message box, then ask your first question.

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.

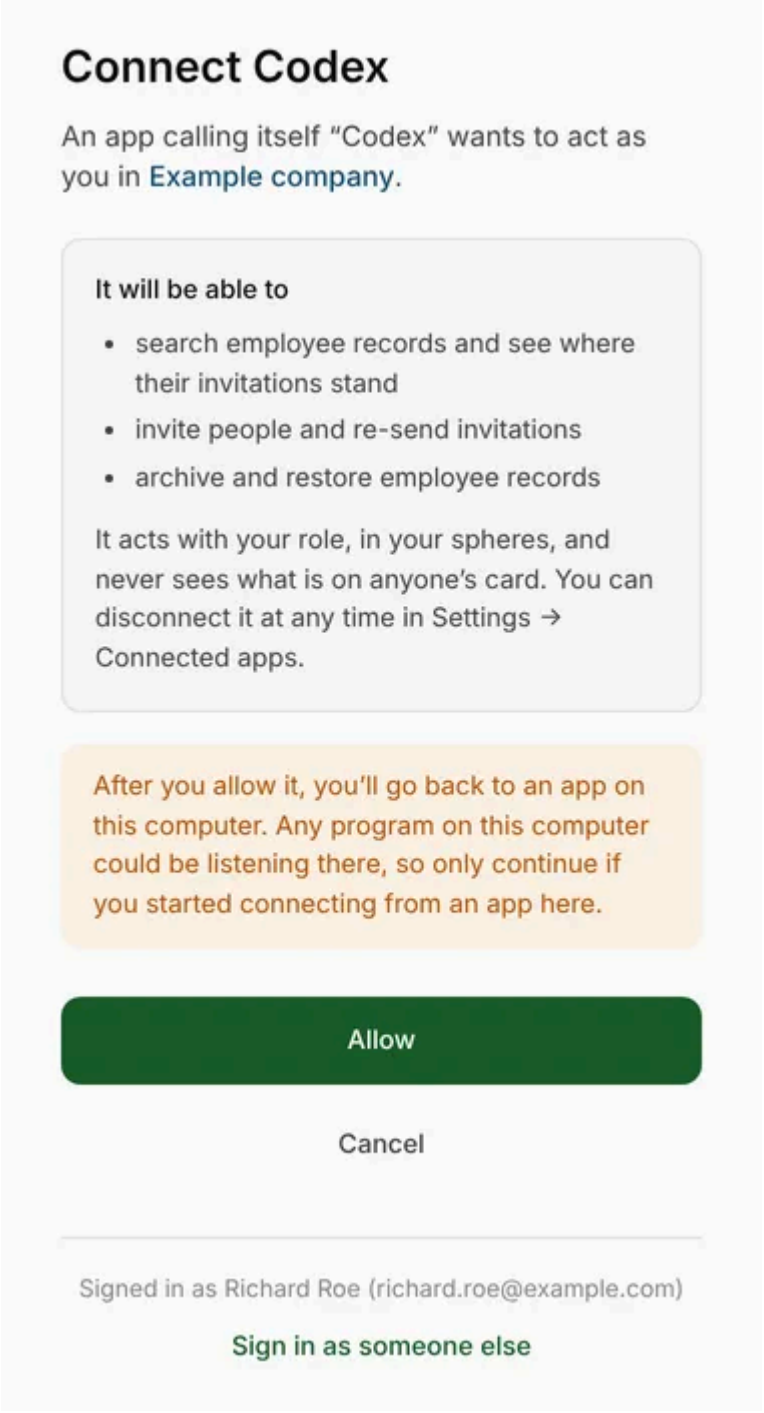
1. Open **Settings → Plugins**, choose **Add**, and pick the custom MCP option.
2. Give it a name, for example `spherum`, choose **Streamable HTTP**, and paste the server address. Leave the bearer token and header fields empty: you sign in instead. Press **Save**.



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**.



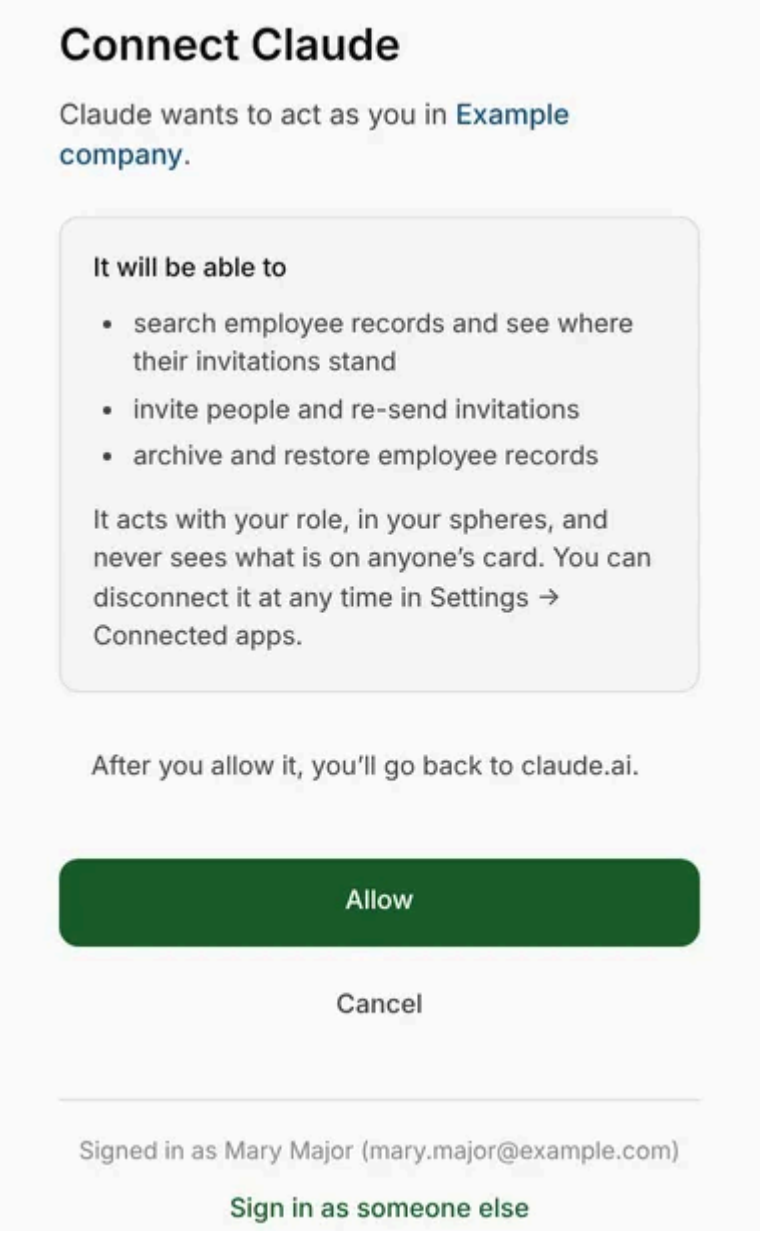
5. A page saying `Authentication complete` opens. Close it, and the **Authenticate** button is gone.

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

This is the one page where you decide, so read it before you press **Allow**.



The company. The name of the workspace the app will act in. If you work for more than one, make sure it is the right one.

You. At the foot of the page: `Signed in as` your name and email address. If it is somebody else's — a shared computer, an old sign-in — choose **Sign in as someone else**.

What it will be able to do. The six actions above, and nothing else.

Where you go back. The address of the assistant you started from. When Spherum cannot confirm the app — it is not Claude or ChatGPT, or it returns to a program on your computer — the page says so in a highlighted box. Only continue if you started connecting from that app yourself.

Cancel sends you back to the assistant with nothing connected.

A conversation, for example

> **You:** Who in our team hasn't accepted their invitation yet?
>
> **Assistant:** Two people are still at **Invited**: Mary Major (mary.major@example.com), invited on 3 October, and John Q. Public (john.public@example.com), invited on 9 October. Each has a link to their record in the Portal.
>
> **You:** Send both of them the invitation again.
>
> **Assistant:** I'll re-send the invitation to Mary Major and John Q. Public. Shall I go ahead?
>
> **You:** Yes.
>
> **Assistant:** Done — both invitations have been sent again.

The names and addresses above are made up, as everywhere in this documentation.

How long a connection lasts

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

It ends sooner when your Spherum sessions end: a new password, an administrator resetting your account, or using a recovery code. It also ends when your account or the workspace is archived. Connect again from the assistant if you still need it.

Disconnecting

Open **Settings → Connected apps** in the Portal. Every connection is listed with the app, when it was connected, and when it was last used. The bin icon disconnects it at once: the assistant's next request is refused.

Your administrators see your connections too, and can disconnect them — for a lost laptop, for instance. Tell them if you no longer use one.

Everything the assistant does is recorded as you, exactly as if you had done it in the Portal.

When something goes wrong

What you see	What it means
"Spherum staff accounts cannot connect apps"	You signed in with a Spherum staff account. Sign in with your company account.
"This workspace is archived, so no app can be connected to it"	The company's 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 you know is there	They are in a sphere you are not assigned to. The assistant sees what you see in the Portal.
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 you to sign in again	The 90 days are up, or your 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. Ask the assistant to find it, and restore or re-send instead.

Reading a card

What an activated owner's card shows you, what it leaves out, and what opening one records.

What is behind the chevron on an activated row, and what opening it does.

Opening a card

On **Dashboard**, the paper plane at the end of a row becomes a chevron once somebody is **Activated**. The chevron opens their card. Rows in any other state have no chevron, because there is nothing behind them to open — Understanding grant states sets out which state is which.

A card also has its own address, which is what an external system points at when it hands somebody a link to a person in the Portal.

What it shows

Who, and since when. Across the top: the sphere the person belongs to, the email address your workspace knows them by, when they granted your company access, and when they last changed anything.

Their contacts, as they filled them in. The fields of your sphere's template, under the groups it defines — the owner's own details first, then the preferred contact, then the backup. A phone is a phone and an address offers to open in Maps.

Fields they added themselves. Anything marked **own field** is something the person chose to put on the card beyond what your sphere asked for. Your template is the question; it does not limit the answer.

What is true right now. A card is loaded at the moment you open it and never served from a cache. What you see is what the person holds today, not what they entered on the day they were invited.

What it doesn't

Anything from before the grant. No history, no previous values, no record of what was corrected. A card is a current state, not a file on somebody.

Anything meant for another company. A person may hold several cards, each answering a different company's sphere. Yours shows yours.

Anything you can edit. The card is read-only for you, down to an obvious typo. The person maintains it, which is the whole arrangement: if they could not change it without you, it would not be theirs.

Contacts in bulk. Print works from inside one open card, one card at a time, and that is deliberate. The roster export carries who you hold and the state they are in — never a field value from anybody's card.

A card whose grant has ended. A revoked row will not open, and what comes back says the source was revoked. That is the person having ended something on purpose, not an error to report. The same is true before they have granted: there is nothing behind the row yet.

Printing a card

> ⚠ **Caution**
>
> Paper is the one copy the owner cannot revoke. The card closes when the grant ends; a sheet already filed does not. Print when something needs the details off-screen, not to keep one to hand.

Print this card produces a single sheet carrying the contacts, your company's name, who printed it and when. It is offered on an activated card only.

It also creates an entry in the compliance trail saying that a card was printed, in which workspace and when. The entry never carries what was on the sheet.

What opening one records

Opening a card is a read, and reads are not written to the compliance trail. Nothing is sent to the person either — they are not told that you looked, and the product does not pretend otherwise.

The roster export is recorded as well, with the filters it ran under described but never quoted.

Understanding grant states

The four states a row can be in on Dashboard, what each one means for what you can read, and what moves a person between them.

Every person in your workspace sits in exactly one state, shown at the end of their row on **Dashboard**. The state is about one thing: whether that person has given your company access to their contacts, and whether they still have.

You never set it. It is derived from what has happened — an invitation sent, a consent given, a consent ended — and the filter above the list narrows by it.

Not activated

The row exists and the invitation has not gone out.

Adding somebody and inviting them are two actions, not one, so this is where everyone lands the moment you add them — the invitation waits until you send it. It is also where a person stays if a send fails: a failed invitation is never silent, and the row not moving is how you see it. Either way there is nothing behind the row — an empty card waiting for its owner.

Send, or fix the email address first and then send. Invitations covers both.

Invited

The invitation has been delivered, and nothing has come back yet.

The link in it is good for seven days. The person has not filled anything in, or has not finished, and there is still nothing for you to read. Silence here is an answer in itself, and resending is the only lever you have — not a reason to add somebody a second time.

Activated

The person filled in their details and granted your company access. Their card is readable, and the Contacts column stops being a zero.

What you see is theirs and stays theirs. They can change a number tonight and your card carries the new one tomorrow; they can end your access at any point without asking you. Reading a card covers what is behind the row while this lasts.

Revoked

The person ended your company's access.

The row stays in the list, keeps its seat and keeps its state on show. The card behind it closes, and opening it says the source was revoked. Nothing is retained from it on your side.

Getting the details again means asking for them again. Re-invite the person and the row returns to **Invited**: they are given an editable card and have to grant afresh. Nothing is served in between, and no previous consent is resumed.

> **Note**
>
> Revoking is not the only way here. Archiving somebody ends their grant too — the company ending its own connection — and it is recorded as that, so nobody is told they revoked something they did not.

What does not move a state

Reading a card. Opening one changes nothing and tells the person nothing.

Anything you do in the Portal. You cannot mark somebody activated by hand, and there is no state that means "asked twice" or "declined".

A token. Whether somebody carries a token is independent of their state here, and it stays independent: a person who has ended your access still has a working token, because a token answers to them and to whoever scans it, not to your workspace.

Seats. Only archiving frees one. A revoked person is still somebody your workspace holds a row for.

When something looks wrong

The cases that come up most often in day-to-day work, what each one actually is, and where the line sits between fixing it yourself and asking somebody else.

Most of what looks like a fault is the product being careful. This page covers the cases that come up often enough to be worth recognising on sight, and then draws the line at what is not yours to fix.

Common cases

"I never got the invitation." Resend it — the same paper plane does both. The link is good for seven days, so a week-old invitation is expired rather than broken, and resending costs nothing and creates nothing: no second row, and nothing the person has already filled in is undone.

The row is still Not activated after you sent. The send did not go through. Try again, and check the address before you do.

The address on the row is wrong. It cannot be edited. An invitation was sent somewhere, and quietly repointing it would mean a row whose history says one thing and whose address says another. Add the person again with the right address and archive the row that was wrong.

The name on the row is wrong. You can fix a name right up until the invitation goes out. After that it is theirs, and they change it themselves.

"I filled everything in" but the row is still Invited. Filling in and granting are two steps, and only the second one gives your company anything. Until they confirm, there is nothing behind the row — Understanding grant states walks through it.

The card won't open. Two different things read almost the same on screen. Either the person has never granted access, or they granted it and have since ended it, in which case what comes back says the source was revoked.

Contacts says 0 on an activated row. They granted access to a card they have not filled in.

You cannot find somebody you know is there. Three usual reasons: they sit in a sphere you are not assigned to, they have been archived and the **Show archived** toggle is off, or you are searching for their personal address. Internal spheres list and search the corporate address only — the person's own address is theirs and never appears.

Adding somebody is rejected as a duplicate. That address is already on a row, whatever the capitalisation. Find the existing row rather than making a second one.

A shared link is refused. It has been revoked, or it has expired — the panel lists every link that is still live. If they are joining an internal sphere, the link also asks for a corporate address, and it cannot be on the same domain as the personal one they sign in with.

Somebody can't sign in because they lost the email or phone they joined with. You cannot change it for them: how they sign in belongs to their own account, not to your workspace. Resending the invitation won't help either — once someone has joined, the code goes to them, whatever address is typed on the page. If they added a second way to sign in, or are still signed in somewhere, they change it themselves — Signing in walks them through it. Otherwise, point them to support@spherum.ae.

What to escalate

To an administrator in your company. Anything about the shape of the workspace rather than the day's work: a sphere you need and are not assigned to, somebody on your team who needs adding or removing, a password or second factor of yours that needs resetting, and anything to do with Integration API keys.

To Spherum. Tokens — ordering a batch, or one that has been lost. Invitations that are failing for everybody rather than for one person. Anything else you are unsure about is welcome too; we would rather hear it early. Support has the address to write to, how quickly we come back and when we are around.

Asking for a shared Slack channel. If your team would rather ask in Slack than write an email, we open a Slack Connect channel between your workspace and ours. Write to the support address with your Slack workspace name and the email address we should send the invitation to — one message is enough. We send a Slack Connect invitation to that address; accepting it is done inside your own Slack, and your Slack administrator may have to allow the external connection first. It is the same people and the same response times as the mailbox, not a faster queue.

Worth a conversation rather than a ticket. Somebody who has not answered yet, somebody who ended your access, contacts you cannot see — these are the product working as it should, and a word with the person usually gets further than anything we could do from our side. If you are not sure which side of the line something falls on, ask us anyway.