Virtus AI Platform

User Management Guide

Overview

This guide explains how to add and manage users in the Virtus AI Platform. The user management process involves three main concepts:

1. Organization Users

Users must first be added to your organization before they can access any features. This is done through the Organization Settings.

2. Teams

Teams are groups of users within your organization. They help organize users by department, project, or function (e.g., Sales, Engineering, Support).

3. Roles

Roles define what permissions users have. You can use default roles (Viewer, Editor, Manager) or create custom roles with specific permissions.

Note: The typical workflow is: Add user to Organization -> Assign a Role -> Add to Team(s)

Step 1: Add User to Organization

Before a user can access any features, they must be invited to your organization.

How to Invite a User:

1. Navigate to Settings from the left sidebar
2. Click on "Organization" tab
3. In the "Team Members" section, click the "Invite User" button
4. Fill in the invitation form:
    - Email Address - The user's email (required)
    - Full Name - The user's display name (optional)
    - Temporary Password - A password for initial login (required)
    - Organization Role - Member or Admin
5. Click "Invite" to create the user account

Organization Roles Explained:

- Member - Standard user access
- Admin - Can manage organization settings and invite users
- Owner - Full control (automatically assigned to account creator)

> *Note: The invited user will need to log in using the email and temporary password you provided. They can change their password after logging in.*

Step 2: Assign a Role (Permissions)

Roles control what features and resources a user can access. You should assign a role to define the user's permissions.

Default Roles Available:

Viewer (Basic Access)

- Can use assigned AI models
- Can access assigned data sources

Editor (Standard Access)

- All Viewer permissions
- Can create and manage API keys

Manager (Full Access)

- All Editor permissions
- Can view billing and usage information

How to Assign a Role:

1. Go to Settings > Organization
2. Find the user in the Team Members list
3. Use the role dropdown next to their name to select a role
4. The role is automatically saved

Creating Custom Roles:

1. Go to Settings > Roles
2. Click the + button or select a template (Viewer, Editor, Manager)
3. Customize the name, description, and permissions
4. Select which models and data sources the role can access
5. Click "Create" to save the role

Step 3: Add User to Teams

Teams help organize users into groups. A user can belong to multiple teams.

How to Add a User to a Team:

1. Go to Settings > Teams
2. Select an existing team or create one with the + button
3. Click the "Add Member" button
4. Select a user from the dropdown
5. Choose the Team Role:
   - Member - Regular team member
   - Admin - Can manage team members
6. Click "Add" to add the user to the team

Team Roles vs Organization Roles:

Team roles are different from organization roles:

- Team Role (Member/Admin) - Controls who can manage the team
- Organization Role (Viewer/Editor/Manager) - Controls permissions

Note: A user can be a "Member" of a team but still have "Manager" permissions. Team membership is for grouping; Roles are for permissions.

Quick Reference Summary

Action	Location	Purpose
Invite User	Settings > Organization	Add user to your organization
Assign Role	Settings > Organization	Set user permissions
Create Role	Settings > Roles	Define custom permissions
Create Team	Settings > Teams	Group users together
Add to Team	Settings > Teams > [Team]	Assign user to a team

Typical New User Workflow

1. Invite user via Settings > Organization > "Invite User"
2. Share login credentials with the user
3. Assign an appropriate role (Viewer, Editor, or Manager)
4. Add the user to relevant team(s)
5. User logs in and can access assigned features

Note: Users will only see models and data sources assigned to their role. Configure the role with appropriate access before the user logs in.