Globant
Enterprise AI

GeneXus

Project and Member management

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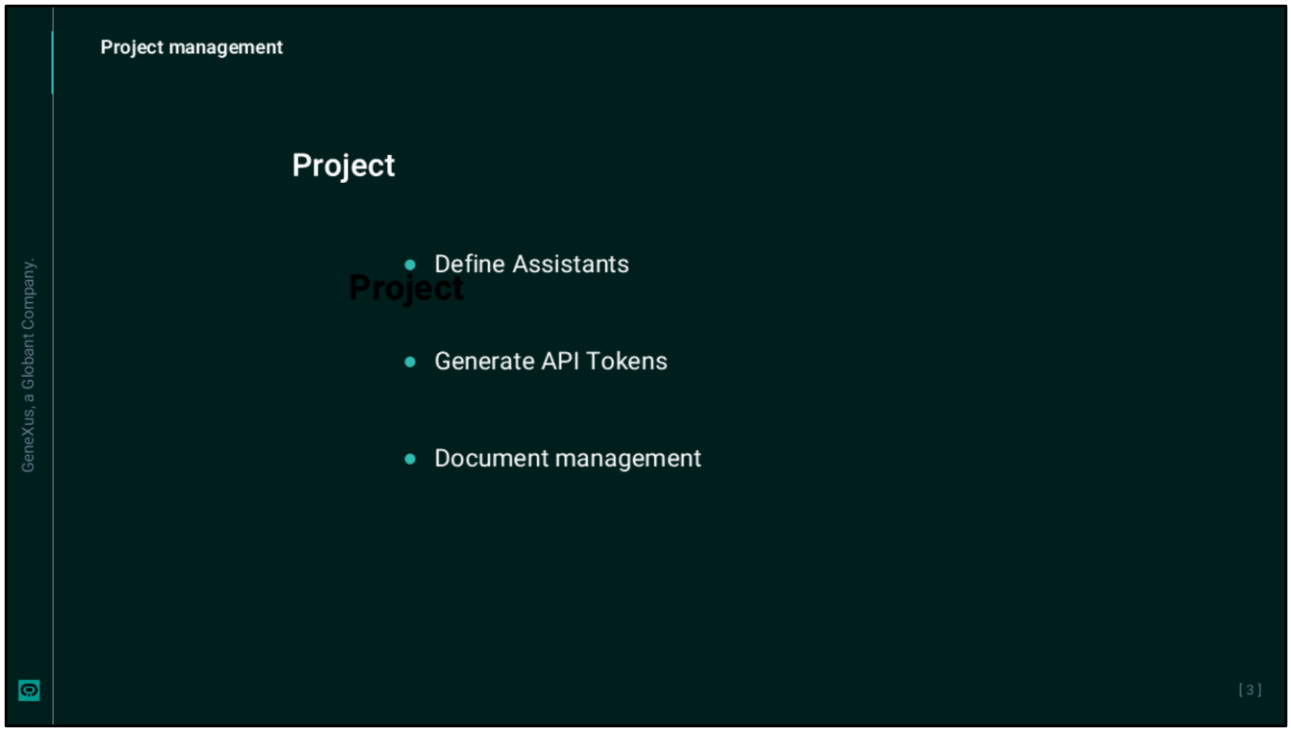
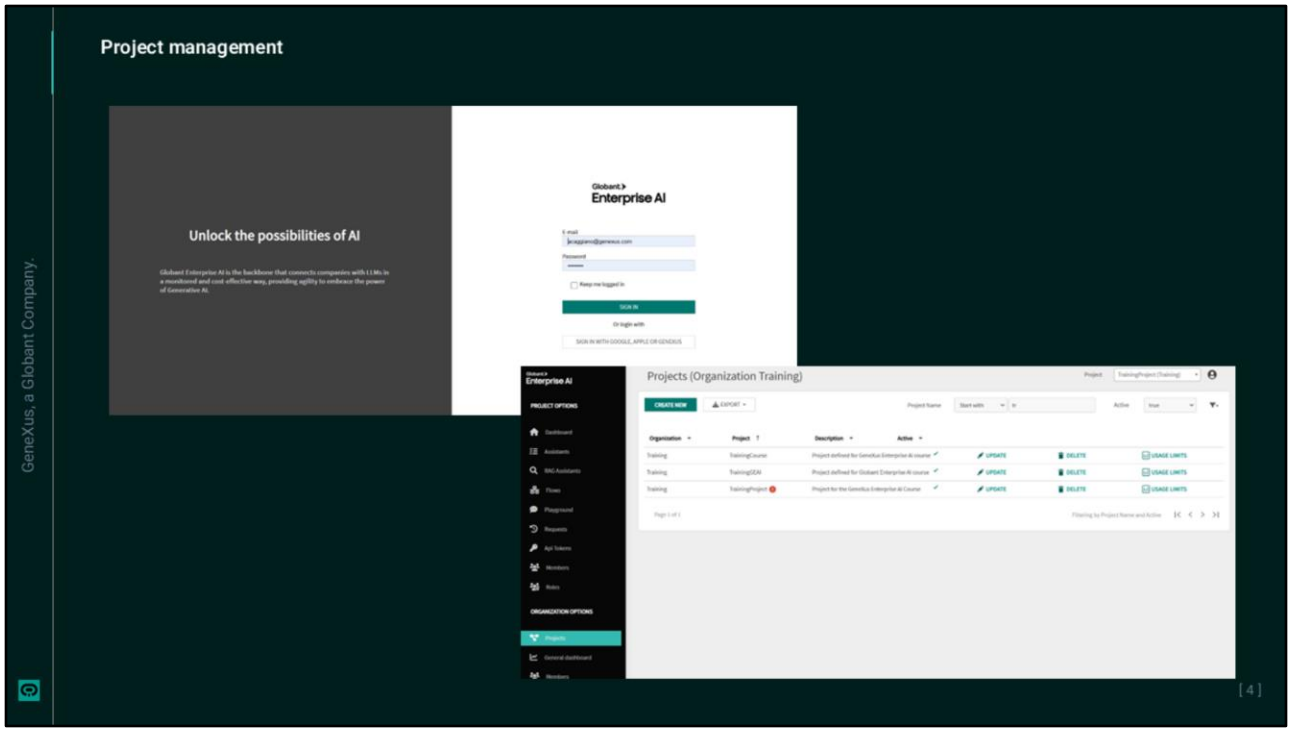
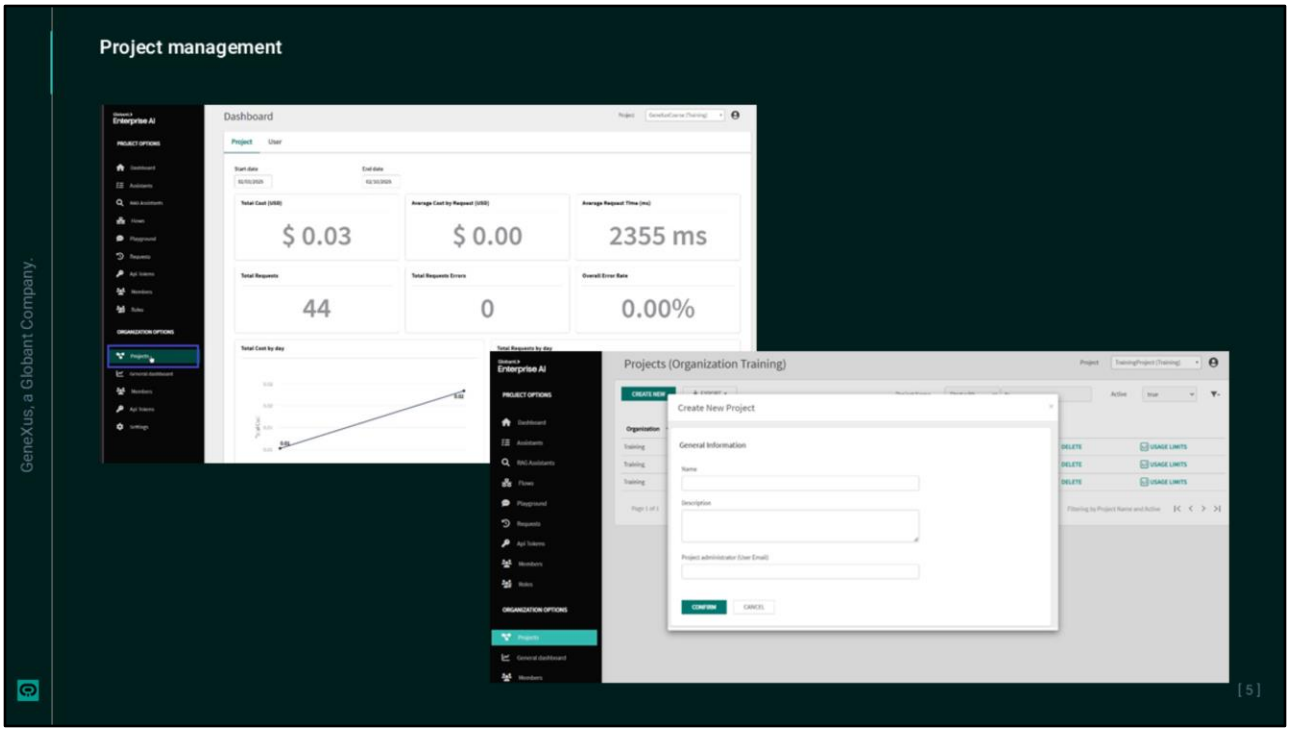


Projects are the central entities where different configurations and settings are defined, including the ability to define assistants, generate API tokens, and perform document management tasks in the organization.

Next, we will see how to run operations related to projects in the back office and manage them effectively.



Good. We will create a new project, so we open the back office interface. It is important to keep in mind that only the organization's administrator can create projects.



Let's look at this menu...

In the “Manage Project” option, we select “Create new”. In this form, we enter the name and description of the project, taking into account that both data should be meaningful and summarize the project's objective. This allows for better organization and provides greater clarity for all users involved in project management.

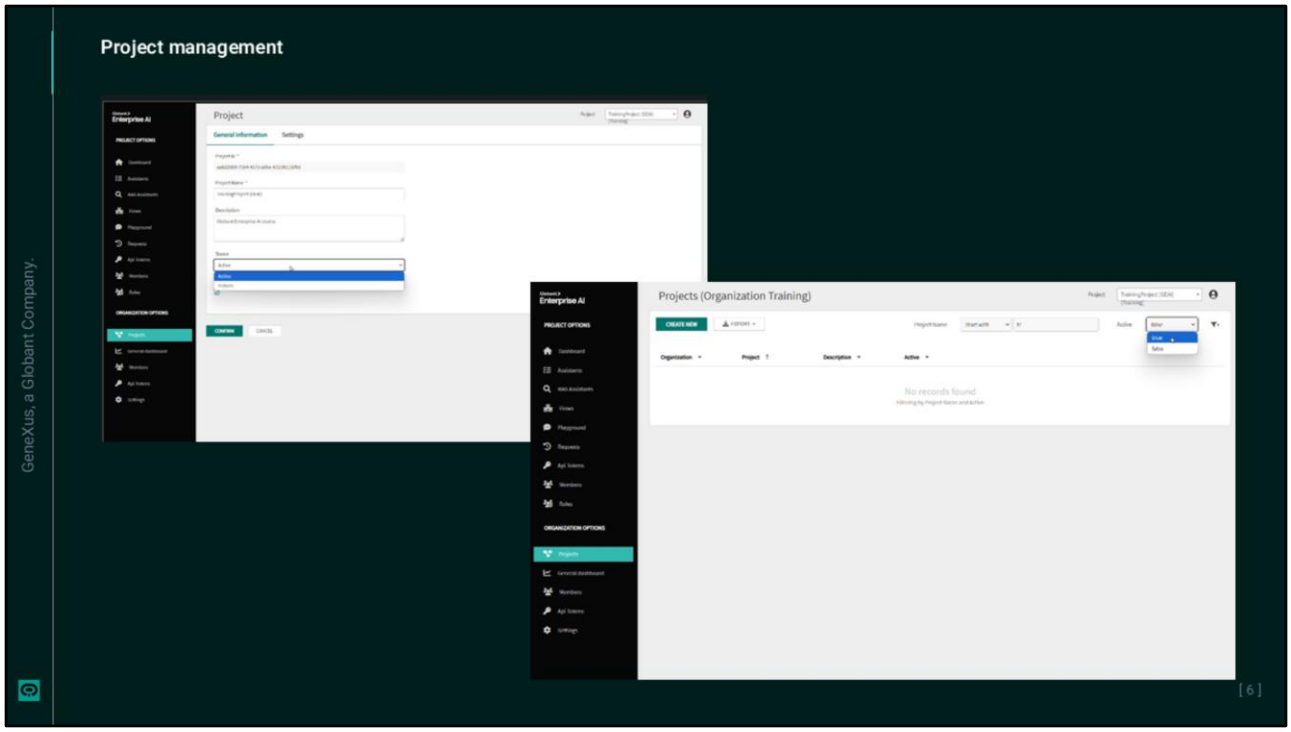
We enter TrainingProject as the name, and enter a brief description. We click on Confirm and the project is created. It is initialized with API token defaults and a configured RAG Assistant (Retrieval Augmented Generation Assistant) that is ready for content loading. Therefore, it is possible to start chatting with those documents from the Playground. We will see this later.

Conceptually, a RAG Assistant is a retrieval augmented generation assistant. It is an architecture that can improve the efficiency of large language model applications by leveraging custom data. This is done by retrieving data and documents relevant to a question or task and providing them as context for the LLM.

Now we can start configuring assistants, defining API tokens, and handling the document management configuration for this project.

Good. A project can have two possible statuses: Active or Hidden.

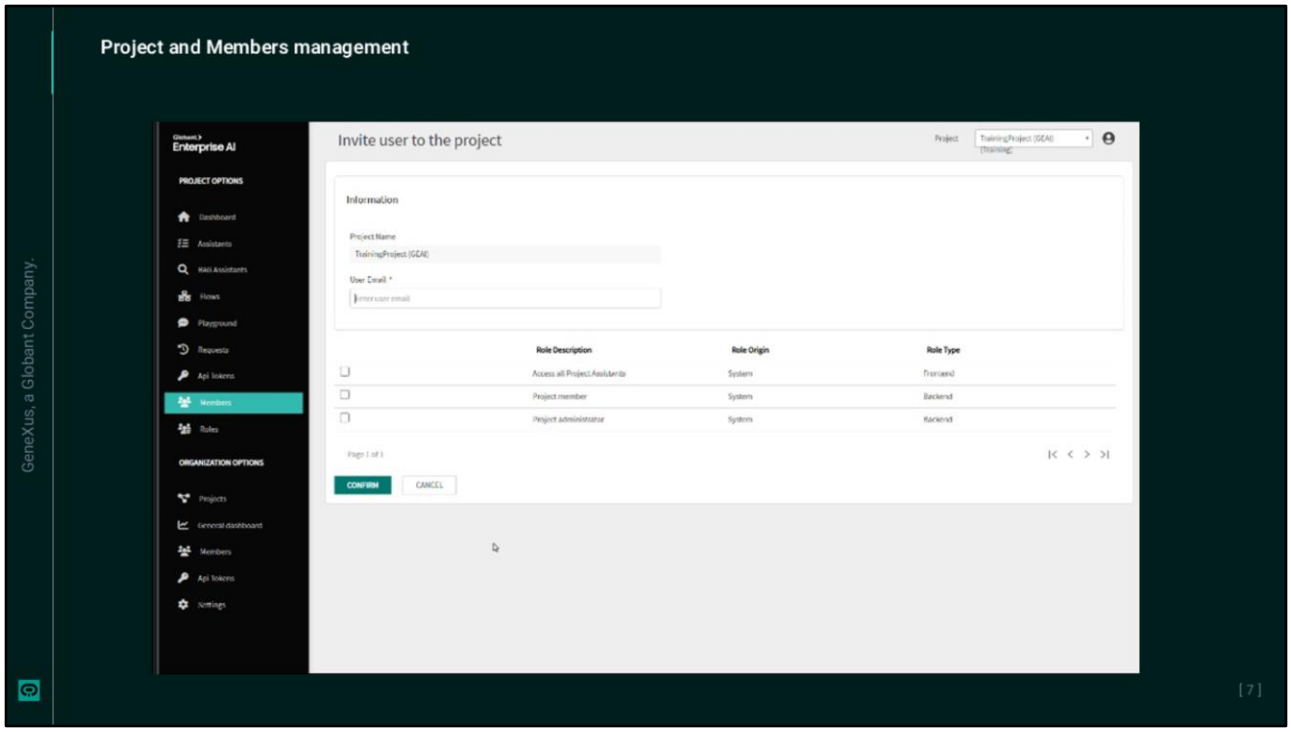
To set the corresponding status, we select Update and choose the status:



Since we have projects with different statuses, we can filter them from here: When configuring a project as active, all subsequent actions and filters in the back office will apply specifically to that project.

It is possible to filter by status, by name, by starting characters, or by characters contained in the name.

It is also possible to create and save applied filters.



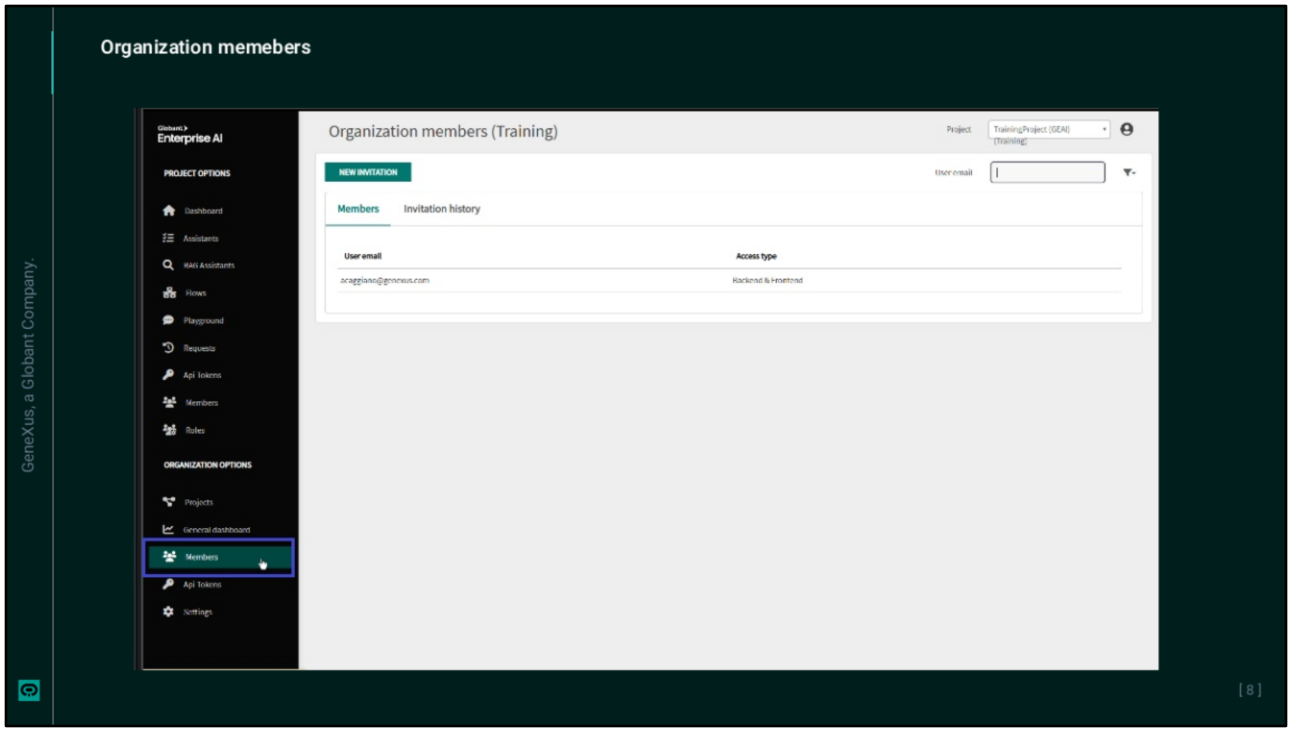
Once a project is created, we can add members to it. This allows you to give new users access to the activities of the selected project.

In the Project options menu option, we select Members...

…and click on New invitation. In addition, we enter the email address of the user we want to add as a member.

Clicking on this button will send an email with the invitation.

Once the invited user enters the back office, they will have access to the project. Remember that the invitation is valid for 24 hours. After this time, it expires and a new one has to be generated.



Similarly, from this option, it is possible to register a member of the organization and send them the corresponding invitation.

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