



AIEX

App Pre-Requisites

Date: 14th July 2025
Version: V1.4



Resources required

The following resources are required to run this app:

- Windows 10 version 17763.0 or later, alternatively MacOS version 10.13 or later.
- Latest versions of Google Chrome, Microsoft Edge, Mozilla Firefox and or Apple Safari.
- A Microsoft 365 Tenant with at least one License
- Power Apps Per App Plan (5\$/M) / Free Trial license.
- Power Automate Premium (15\$/M) / Free Trial license.
- An Open AI Account or Organization with an API Key.
- A Power Platform Environment with Dataverse

Set up a Microsoft 365 Tenant

To create a Microsoft 365 Tenant, do the following:

- Go to <https://signup.microsoft.com>
- Sign up for a free Microsoft 365 trial or create a Microsoft work account.
- This creates the tenant, which is required for provisioning Power Apps, Power Automate, and licensing.

Set up the Power Apps / Automate Licenses

Use the official Microsoft guide:

<https://learn.microsoft.com/en-us/power-platform/admin/about-powerapps-perapp?tabs=new#step-1-purchase-per-app-plans>

Note that free trials are set up automatically for the user who provisions it to themselves.

Creating an environment with Dataverse

To create an environment with Dataverse, start by navigating to the Power Platform Admin centre: <https://admin.powerplatform.microsoft.com/>

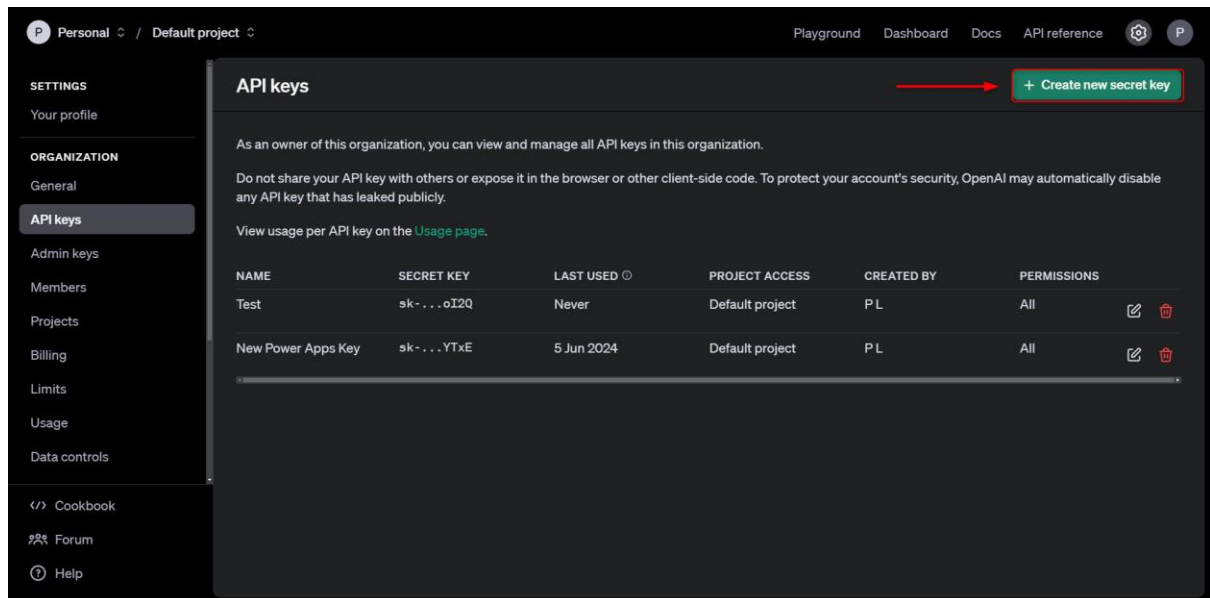
- Once on the page, select “Manage”
- Select “Environments”
- Select “New”
- Enter in the following details:
 - o Name,
 - o Region,
 - o Type (Production),
 - o tick “Add a Dataverse data store” and select Next
 - o Language
 - o Currency
 - o Security Group (Up to you, if none created, select none)
 - o Select Save, your environment will now be created.

Settings up OpenAI API Key

This section will go through how to set up the OpenAI API key to use the main functionality of the app, first, head to the following link: <https://platform.openai.com/settings/organization/api-keys>

Log in into the OpenAI platform or register a new account if one doesn't exist yet.

Once logged in, select “+ Create new secret key” and create a secret key, it is possible to either create one specifically for a user or a bot account, up to preference.



Once created, please make sure to save it somewhere as it will be used later in this installation guide, as once this page is navigated away from the secret code will be shrouded.

Installation of App - Manually

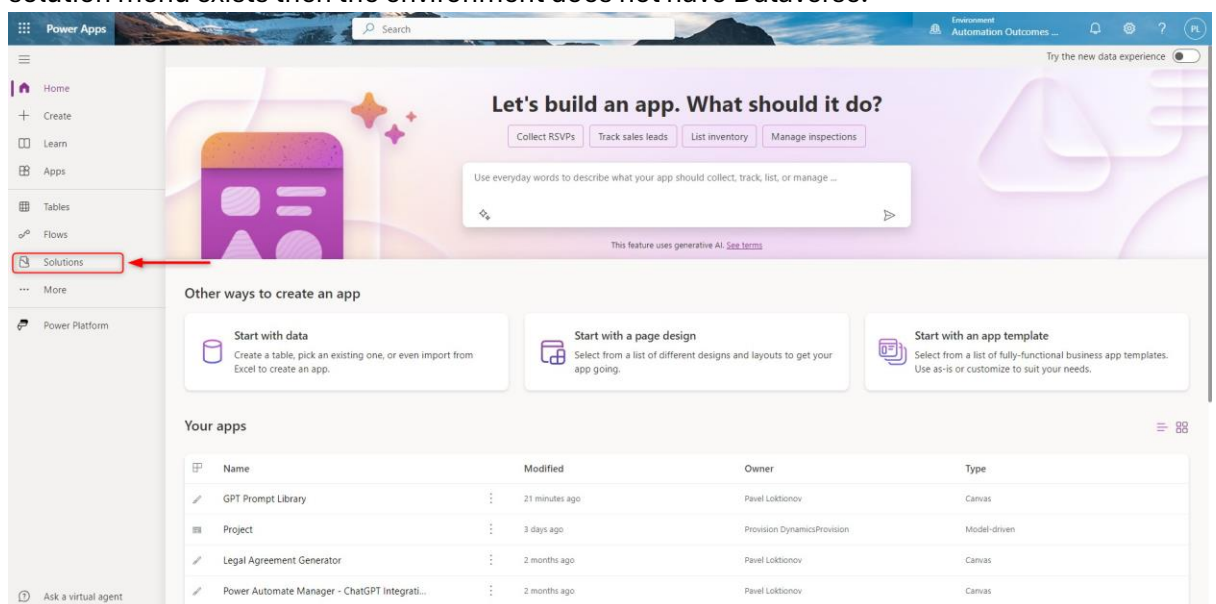
Skip this section if you have installed the app already using AppSource.

This section goes through how to get and install the app into a power platform environment for business usage.

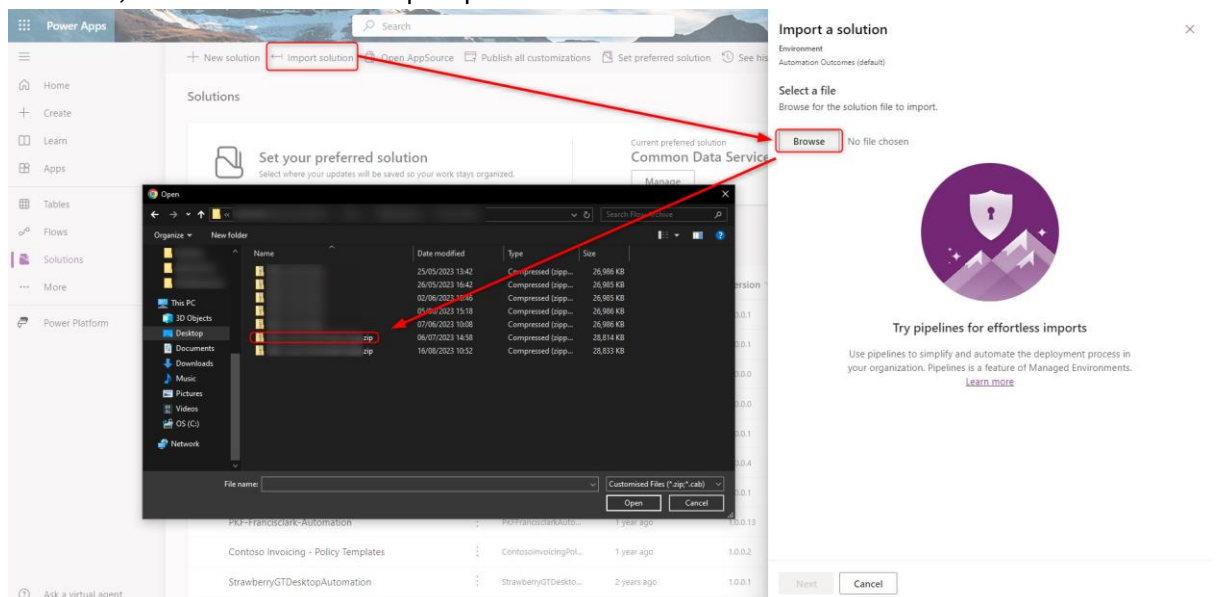
The first step is to import the Apps' Solution Package Zip

Once saved, proceed with the following steps:

- Launch any browser that is listed in the resource required section above
- Go to the official Power Apps webpage, via google search or the following link:
<https://make.powerapps.com/home>
- Select "Solutions" from the left-hand menu, if not visible check the "More.." menu, if no solution menu exists then the environment does not have Dataverse.



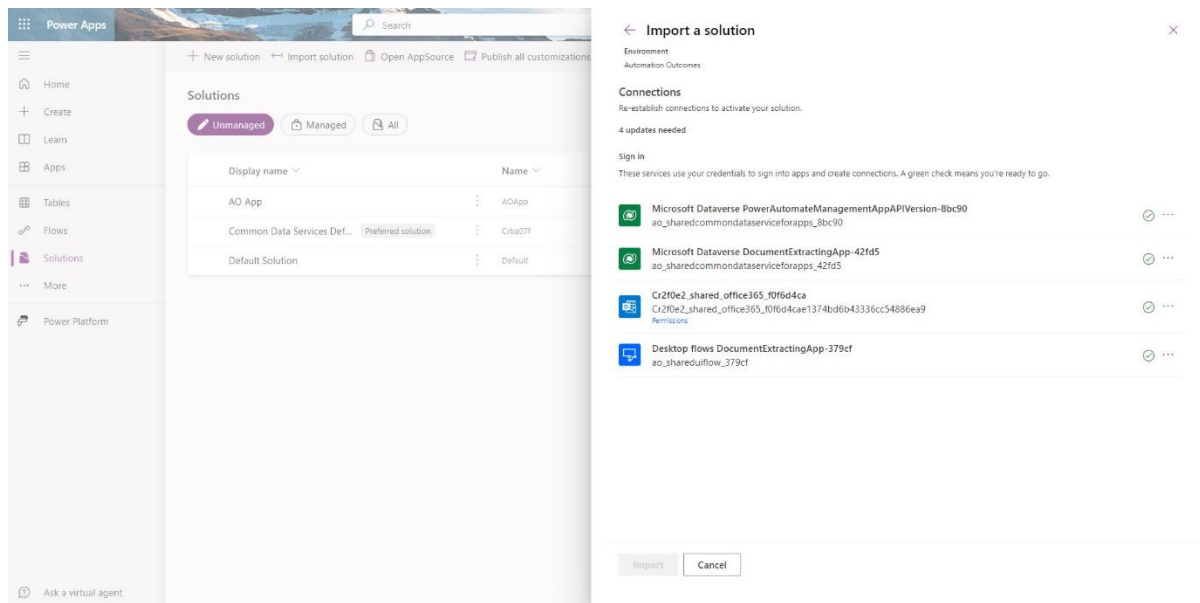
- Inside the solutions menu select "Import Solution", from there a menu popup will appear, select "Browse" and select the Solution Zip Package that was saved on the machine, this will initiate the import process.



During the import process the user will be prompted to enter / select several connection details, fill them in as follows:

Connections:

- Dataverse Connection, make sure to have a Dataverse in your environment.
- Outlook Access, log in with a Microsoft account.
- Desktop Flow, log in with machine credentials, the desktop flows will run on that machine



The user will also be prompted to enter environmental variables, fill them in as well:

Environmental Variable:

- OpenAI API Key, paste the OpenAI API key that was created in the section prior.

Once entered, select next and the import should start.

Note you can change the OpenAI API Key by uninstalling the solution and re-importing it, or using the flow provided AIEX – CLOUD – OpenAI API Key where you'll be prompted to enter a new key

Once the import is done, go back the Apps section, and the app should appear in “My Apps”, hover over its name and select the Run button, this will start the App

The app can also be started from Windows rather than the web using the official Power Apps application that can be found in the Microsoft Store.

Note that the app will not have any data to start off with.

Installation of App - Automatically

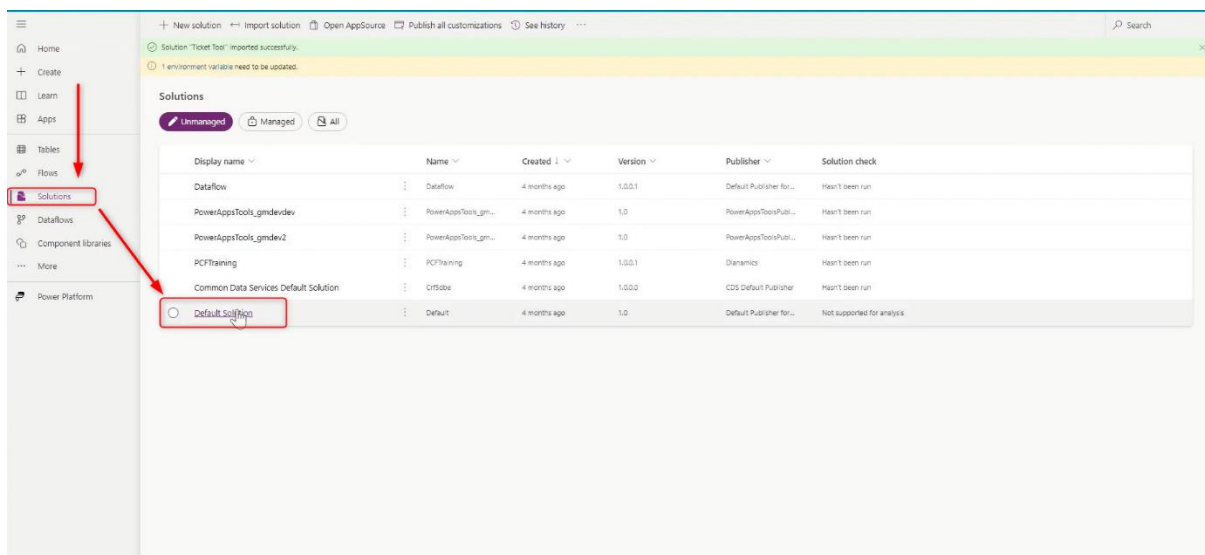
If the solution was installed automatically using package deployer then please make sure to go through the following steps:

Once installed, there are no connection references or environmental variables set, this must be done manually, for connection references follow this video guide:

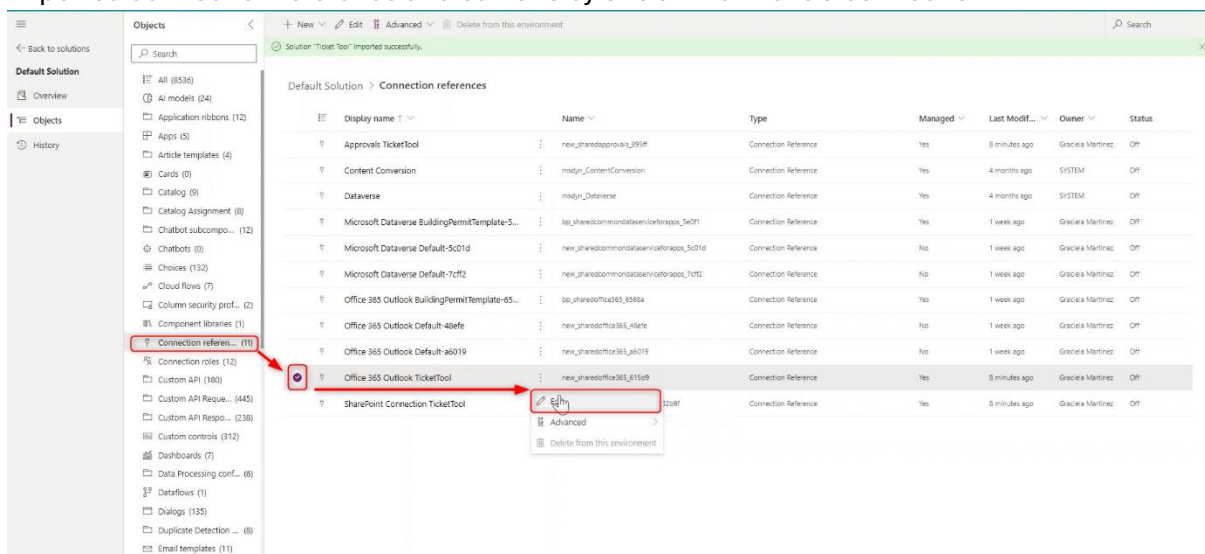
<https://www.youtube.com/watch?v=guNkK2P8crA>

If the video no longer works, here’s a quick summary of what to do:

Select the solutions tab from the left hand side -> then select “Default Solution” in the list



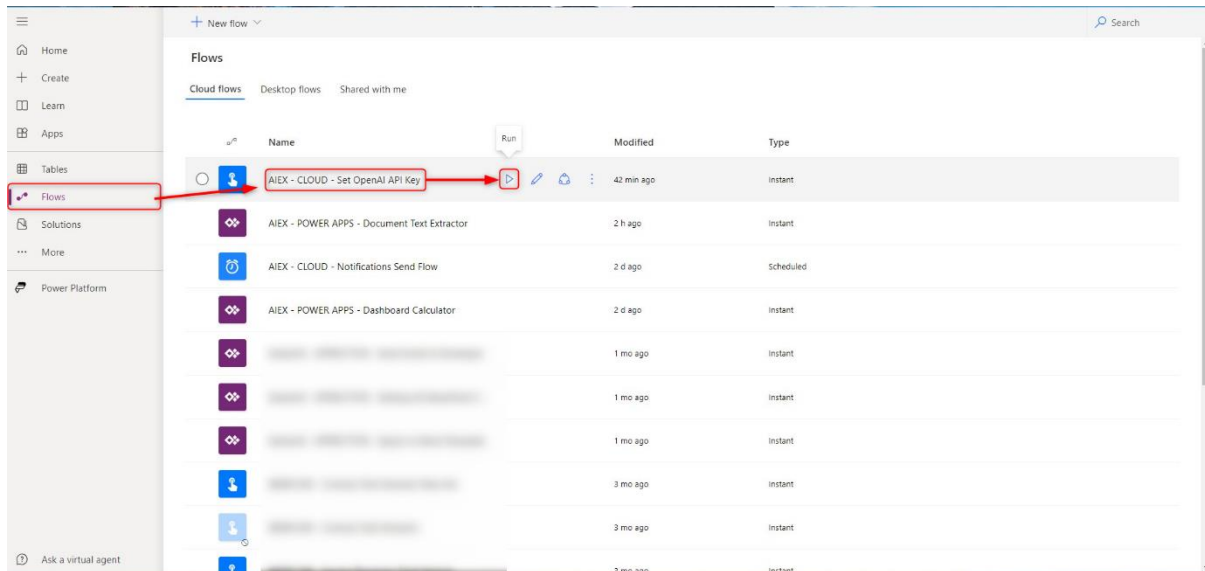
Once opened, select “Connection References” from the objects list, then select the newly imported connection reference and edit one by one until all have a connection.



Credit of the screenshots to the Power GI Youtube Channel, <https://www.youtube.com/@PowerGI>

For Environmental variables:

Exit the solution and select “My Flows” tab and run the “AIEX – CLOUD – Set OpenAI API Key” flow, this will prompt the user for an API key to OpenAI, enter it here otherwise the extraction part of the app will not function. If the API key expires or a new one is created, use this flow to replace it as well.

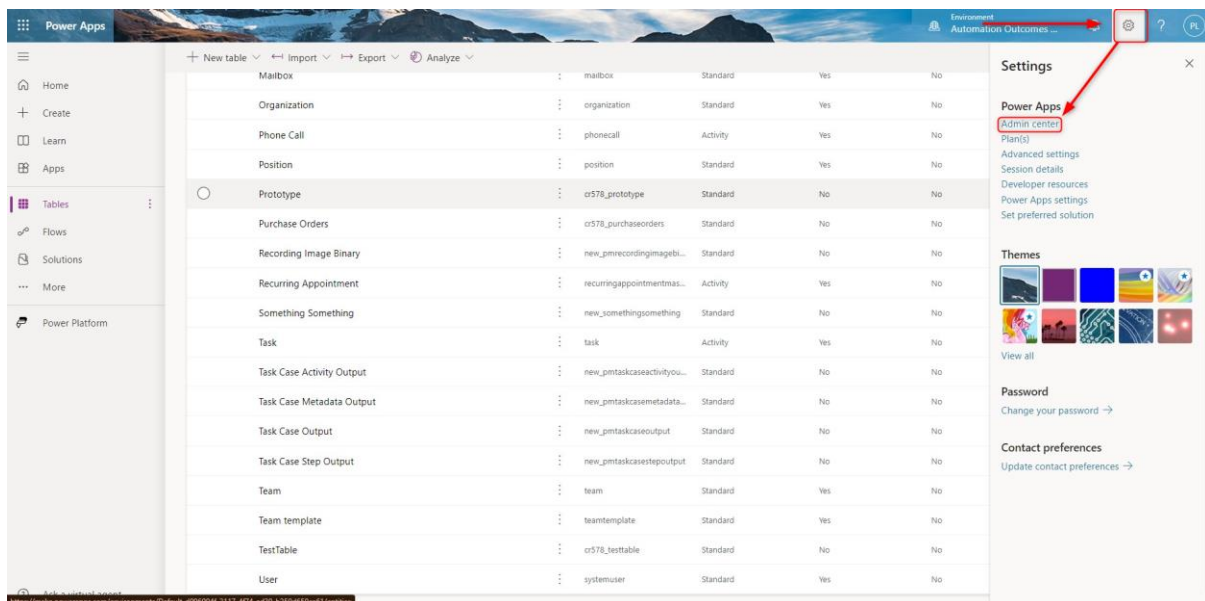


Creating an Admin Role

When the app is first opened, no admin user is created, this means that no one is allowed to edit, delete or create certain aspects of the app. To change this, a security role assigned to a user by a System Admin is first required.

A system admin can assign the security role that came with the solution named “ALEX – Admin Security Role” by going through these steps:

Navigate to Power Platform Admin Centre:

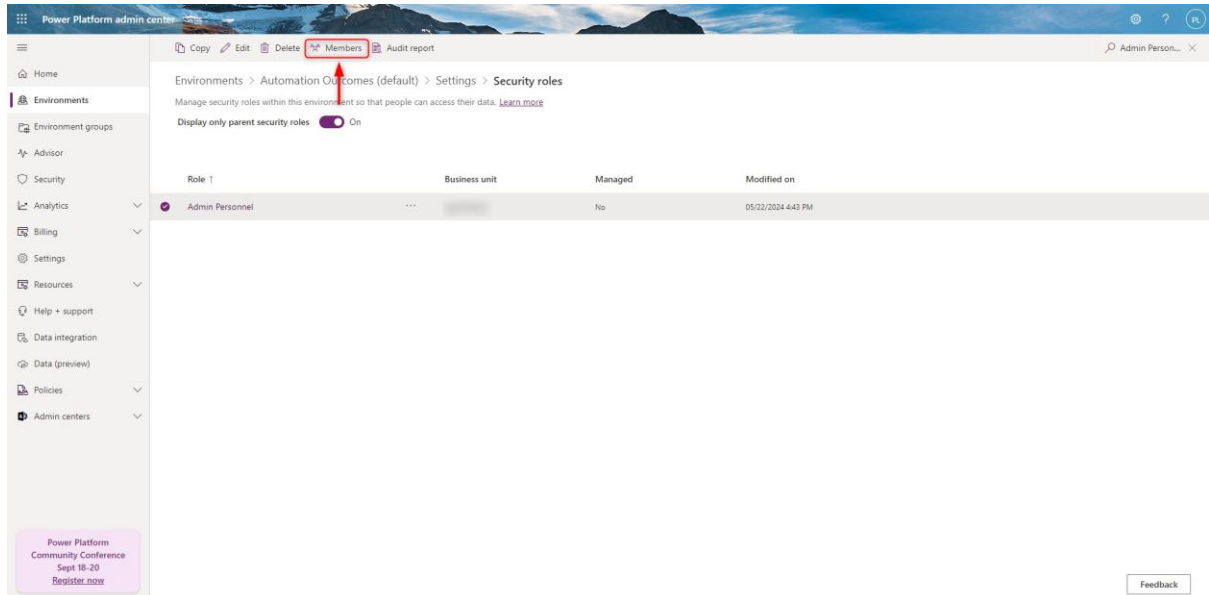


Select “Environments” in the left-hand menu and select the environment the solution was imported into (visible in top right corner of the screen).

In the environment, go to Settings > Users + Permissions > Security Roles.

Search for “AIEX – Admin Security Role” security role and select it in the table (do not open it, just select)

From here Click on Members button in the top ribbon bar



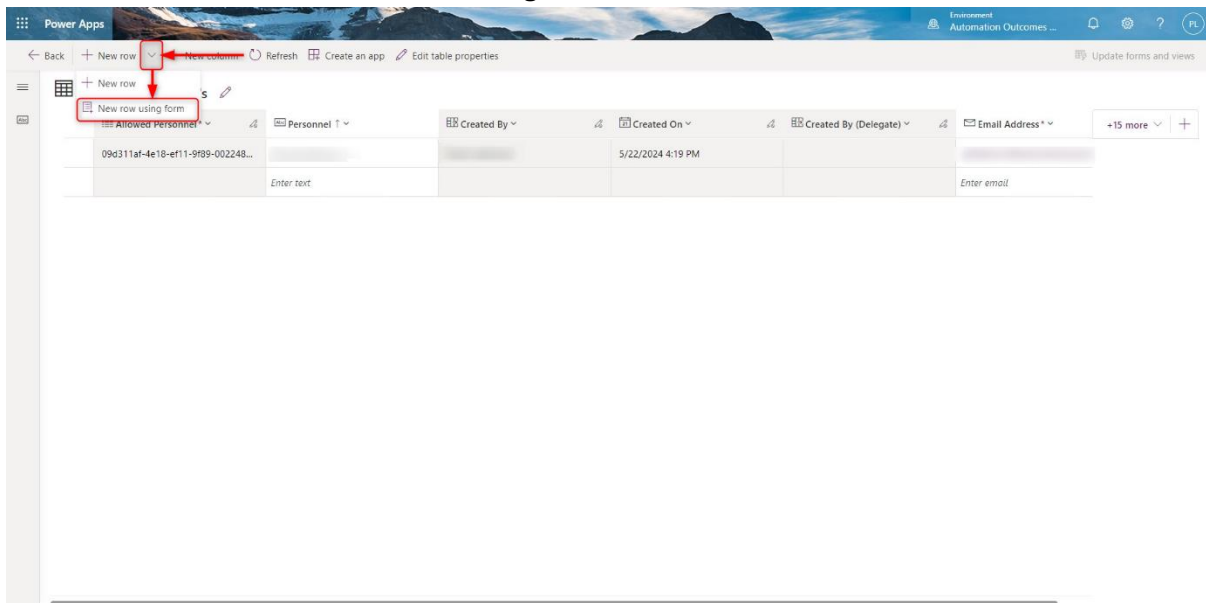
Add the user to the role as needed.

Now open the newly imported solution.

Once opened do the following:

- Select the “AIEX – Security Privileges Table” table.
- Select Edit in the top ribbon bar.

- Once on the full table-view screen, select the arrow down icon next to the “+ New row” button and select “New row using form”



- Doing so will open the new row form screen, allowing for a simple way to create a new row with all the required fields to be filled on screen.
- Fill in the required fields as follows:
 - o Admin – Full Name of user to be added
 - o Email Address – Enter the email address of the user, this must be the email that the user uses to log into the Power Platform environment. Doing so allows the aforementioned to be detected by the app and given their assigned role.

The user should now be a global admin of the app and be able to create or delete folders, files, edit AI prompts. etc.