GenerAIt
User Guide Handbook

Date: 02'th December 2024

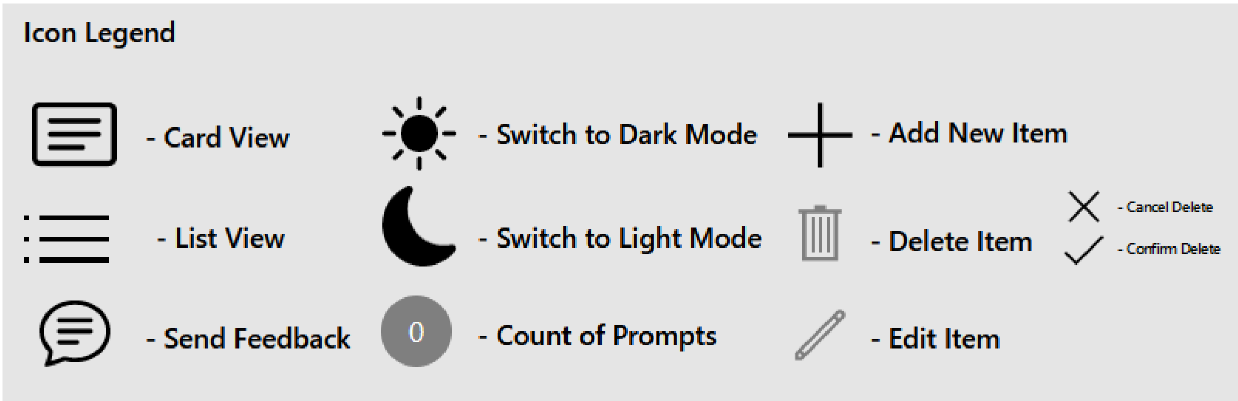
Version: V1.1

Contents

App description

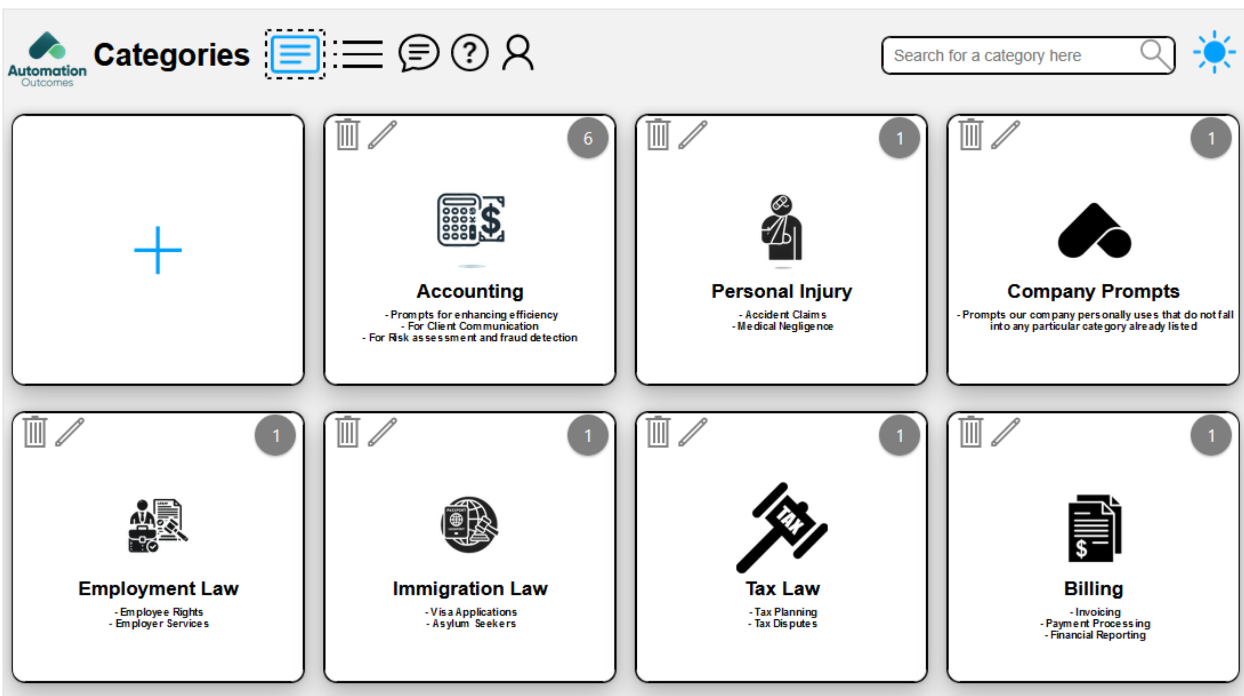
This app is designed to provide a simple, modern interface that helps you store, access and apply specifically engineered prompts inside of a library. The app also provides a space for applying the prompts in a lab-like environment with an option to store the answer to those prompts in a SharePoint library as .docx files. A search function to help with large libraries is also included, it looks for any key text, tags or words in descriptions to help locate the prompt or category. Admin personnel are able to create, delete and edit their own categories or prompts for users to use. The users are able to give feedback on prompts, allowing for a way to gauge the effectiveness of a prompt in a controlled manner.

Icon Legend



Screen Guide

Categories Screen



The category screen is the main screen of the App, it is responsible for providing a way of navigating through out the rest of the app and to provide a structured overview of catalogued prompts, akin to that of a library holding books to a specific category.

In this section Admins can:

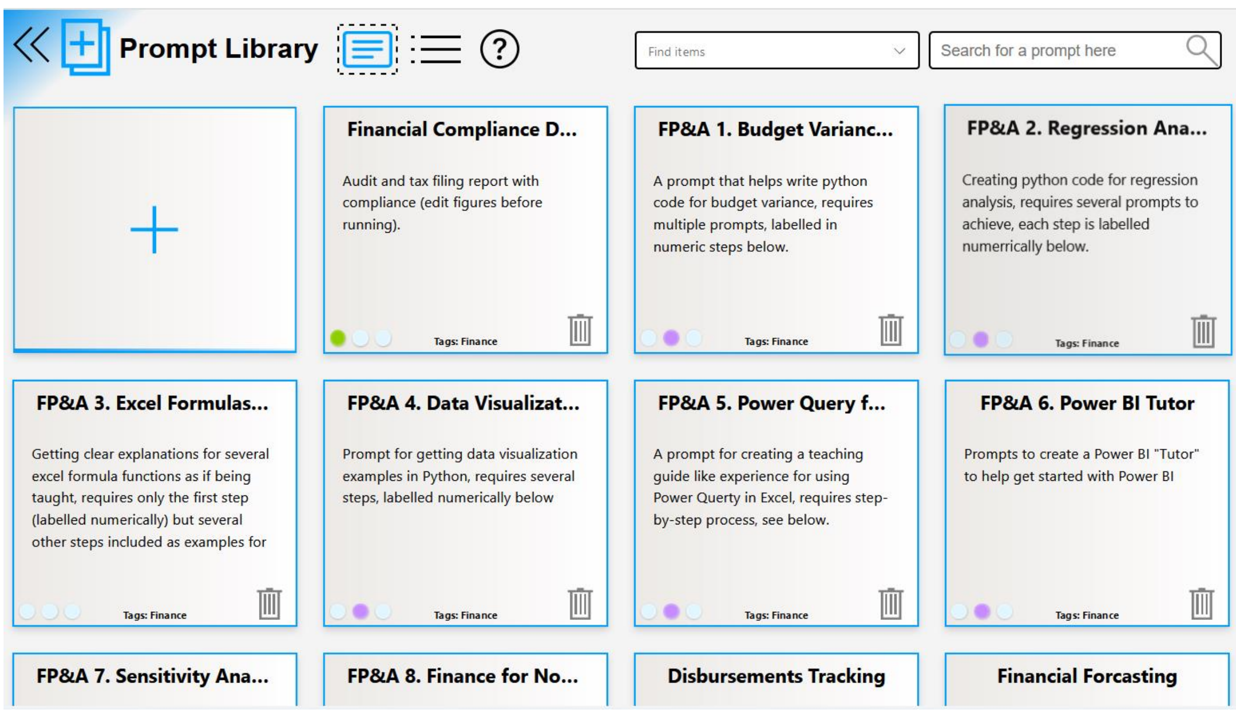
- Create Categories
- Edit Categories
- Delete Categories
- Search Categories
- Switch Views (Card or List)
- Send Feedback

While Basic Users can only:

- Search Categories
- Switch Views (Card or List)
- Send Feedback

This is also the only screen in which a user can switch between dark and light modes by selecting the either **Sun** icon for "Dark Mode" or the **Moon** icon for "Light Mode" in the top right-hand corner of the screen.

Prompt List Screen



The following screen concatenates all the prompts in a specific category into an easy-to-navigate list, letting a user comfortably pick what they need for their task. Note that there can be multiple categories assigned for a particular prompt, for example:

A financial report prompt could fall into two distinct categories; Finance and Mathematics.

These categories may also overlap between each other, for example:

If there's a Law category and a Family Law category, Law will contain both Law prompts and Family Law prompts as they share the same common denominator (Law) while Family Law will only contain Family Law prompts.

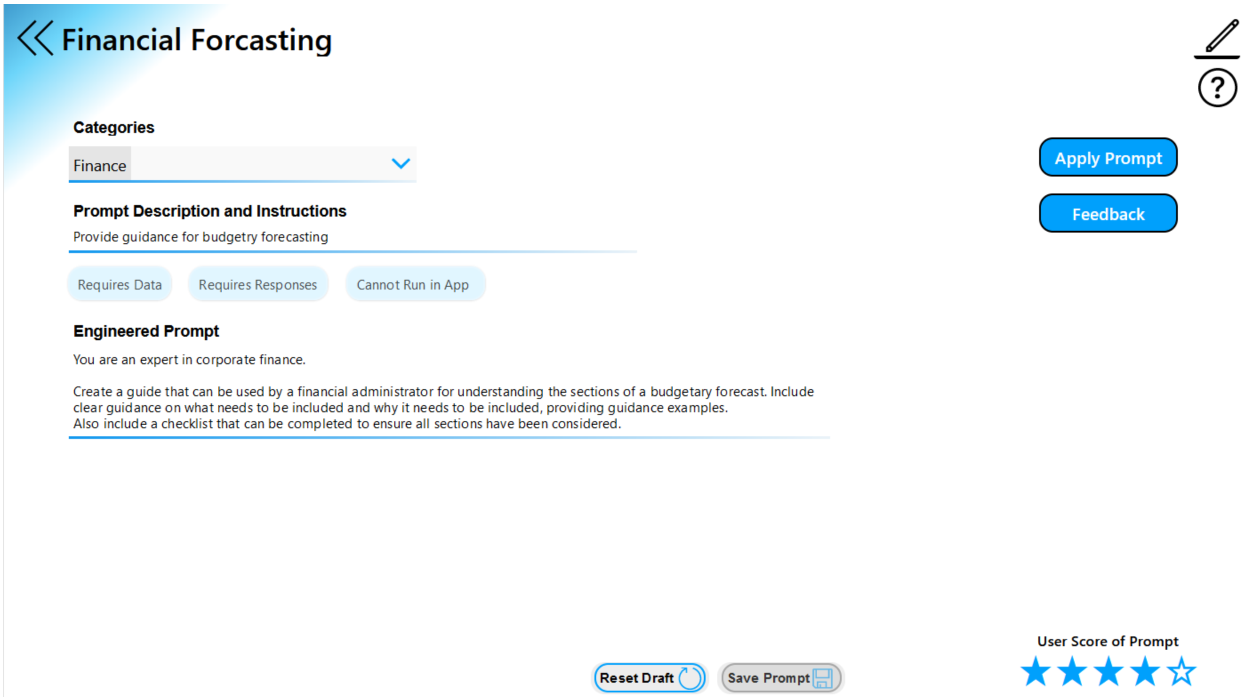
In this section Admins can:

- Go to Create Prompts
- Select Prompts
- Delete Prompts
- Search Prompts (via their description, name, and or text in prompt)
- Filter Prompts via dropdown for if they need data, responses, or if they're un-usable in app
- Switch Views (Card or List)

While Basic Users can only:

- Go to Create Prompts
- Select Prompts
- Search Prompts (via their description, name, and or text in prompt)
- Filter Prompts via dropdown for if they need data, responses, or if they're un-usable in app
- Switch Views (Card or List)

Edit Prompt Screen



On this screen you can review and or create (see section below) a prompt. A basic user only has the privilege to view a prompt, they cannot edit it, they can however, provide feedback and or apply prompts at their own discretion.

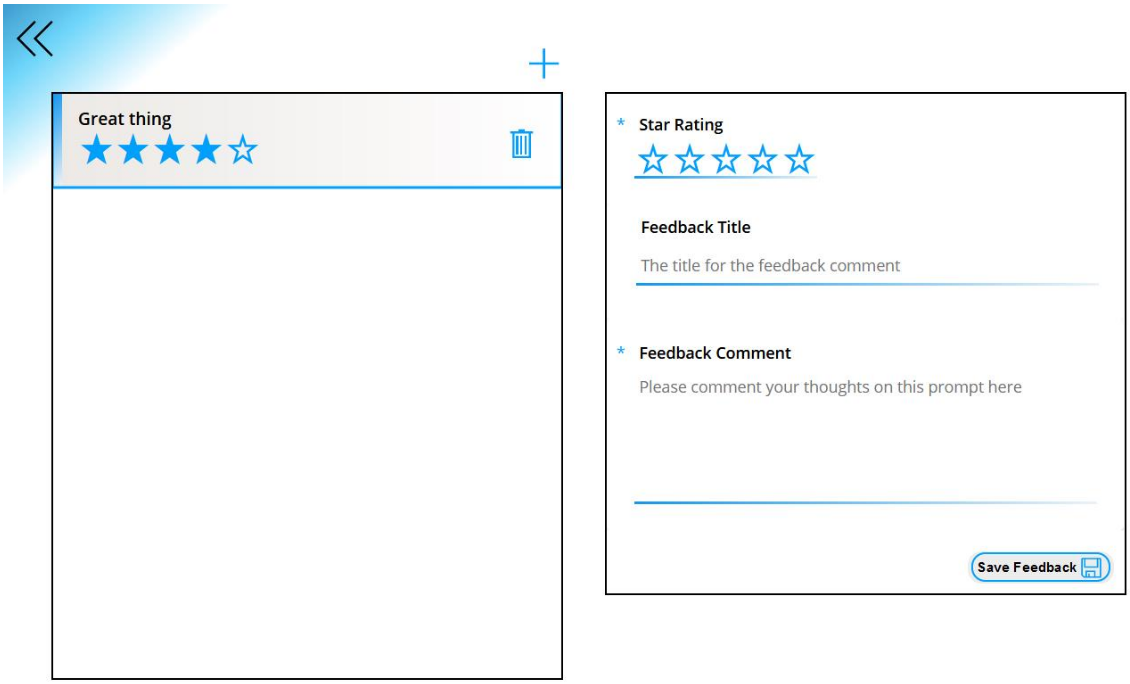
In this section Admins can:

- Create a prompt
- Edit a prompt
- Save a prompt

While Basic Users can only:

- View a prompt

Feedback Screen



This screen provides a feedback loop, a way for users to give vital information for developers of the prompt in order to improve said prompt by taking the feedback into consideration. Each prompt contains its own separate instances of feedback, the star rating of the prompt is averaged as would be expected and shown on the prompt screen. Any amount of feedback can be written, while there is a hard limit, it is quite high. (>10000)

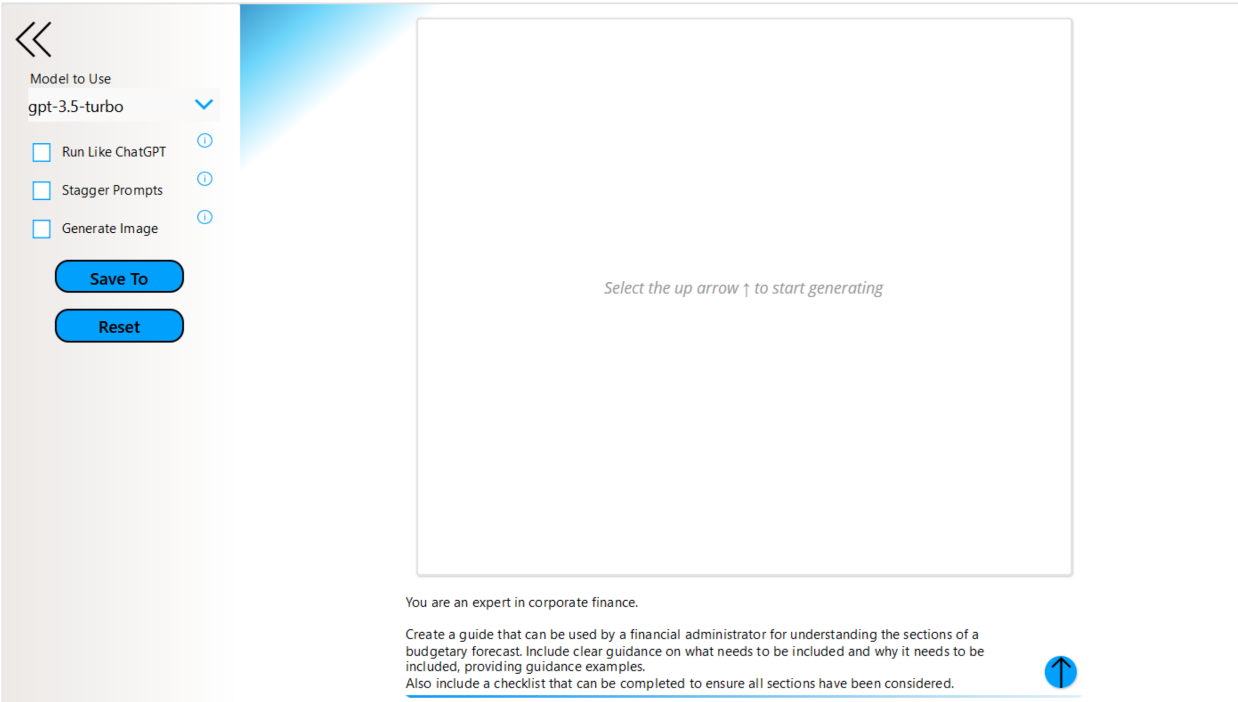
In this section Admins can:

- Create Feedback
- Edit Feedback
- Save Feedback
- Delete Feedback

While Basic Users can only:

- Create Feedback
- Edit Feedback
- Save Feedback

Apply Prompts Screen



The Apply prompts screen provides a way for users to use prompts straight away without having to login to the ChatGPT Website. While the functionality is not the same, it provides a simple and quick way of testing prompts inside the application with the same accuracy and efficiency as found in ChatGPT.

This screen has several modes, initially it will only run on a prompt-by-prompt basis, but a "Run like ChatGPT" mode is available and allows for the ability to run prompt consecutively as in ChatGPT, however do note that this will increase the cost with each run for the API.

Another mode included is the "Stagger Prompts" mode, this mode provides the ability to stack multiple prompts on one screen and run them individually, allowing for seamless prompt runs that can be kept track of, be it for testing or personal use.

The final mode included is the "Generate Image" mode, which uses the DALL-E-2 AI (the only available image API as of writing) to generate any image from a prompt that's required.

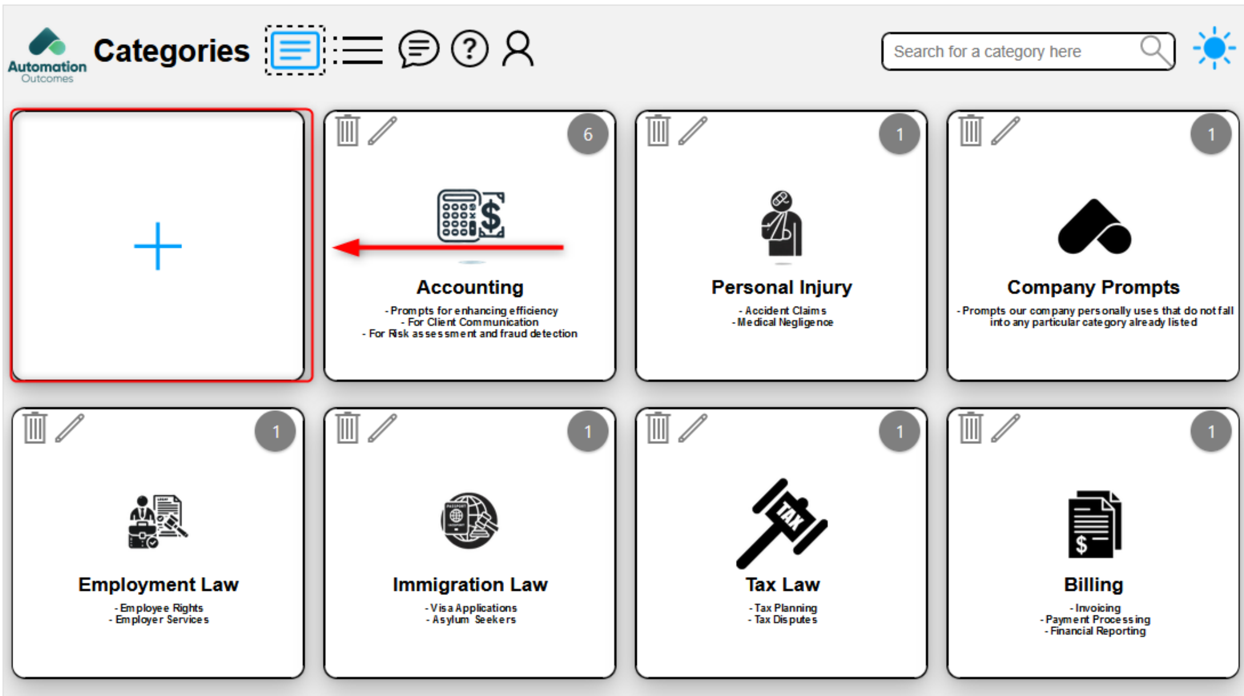
The text from the prompt can also be saved into a word file into the SharePoint of the team using this application

The last feature included for this screen is - if the prompt is marked with a "Requires responses" tag, a side menu will appear on this screen that lists all the responses written on the previous page, all these responses have a copy-to-clipboard button, allowing for easy copy and paste access to apply prompts.

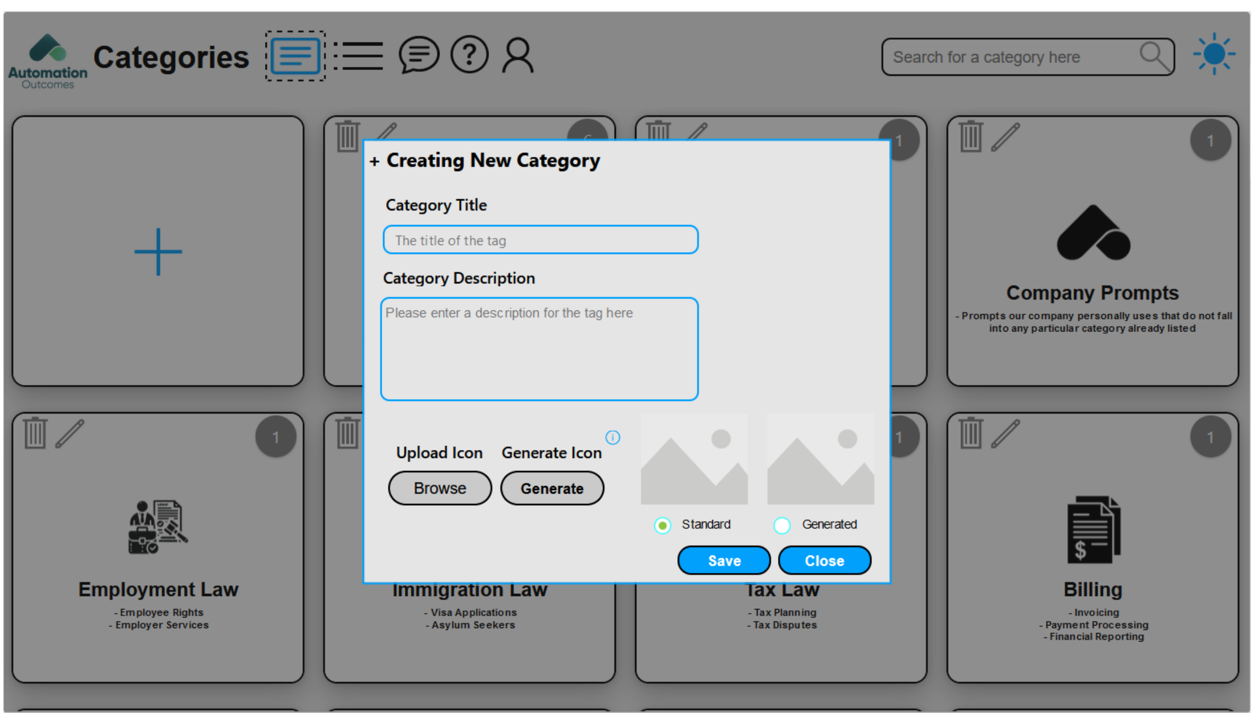
How to Guide

How to create a new Category (Admins only)

First, select the “+” item, it should be the very first item in the category list.



A popup will appear on screen asking for details of the new category:



When creating a new category, the application will ask for additional information regarding that category, namely:

- The main title of the category (required)

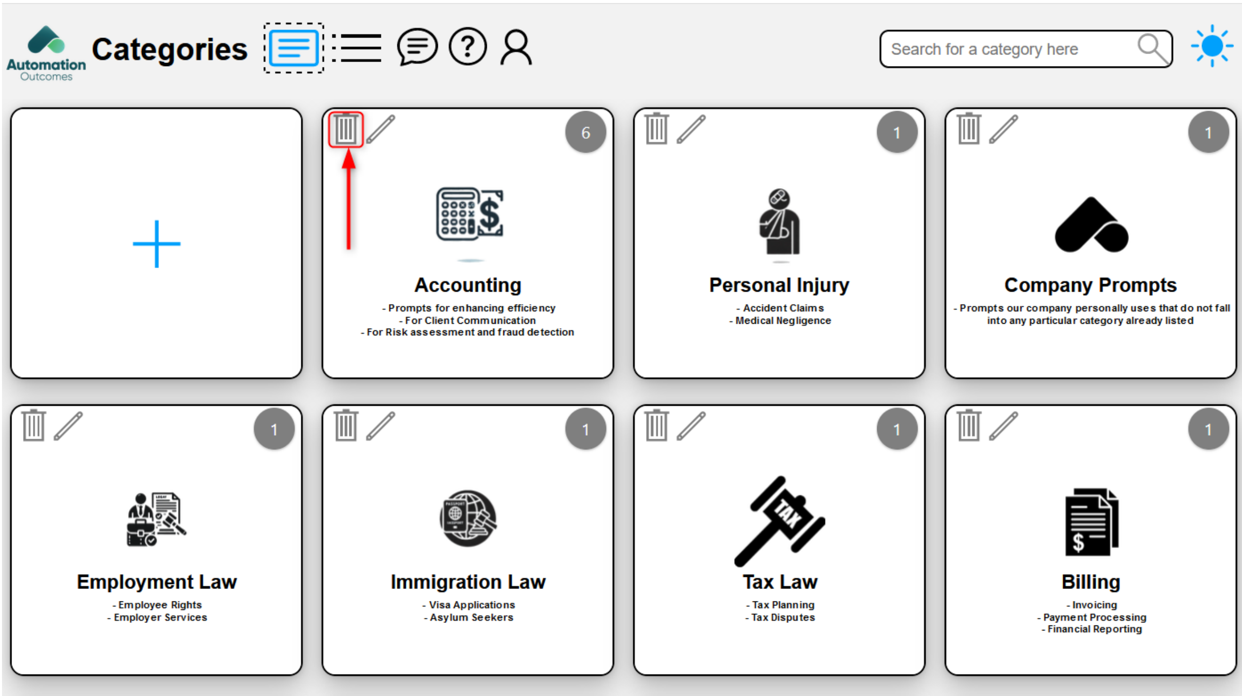
- The description of the category that describes the kind of prompts it will hold (required)

- The icon of the category, it possible to either A. browse for an icon on the target machine or B. generate one from the **title** of the category (optional)

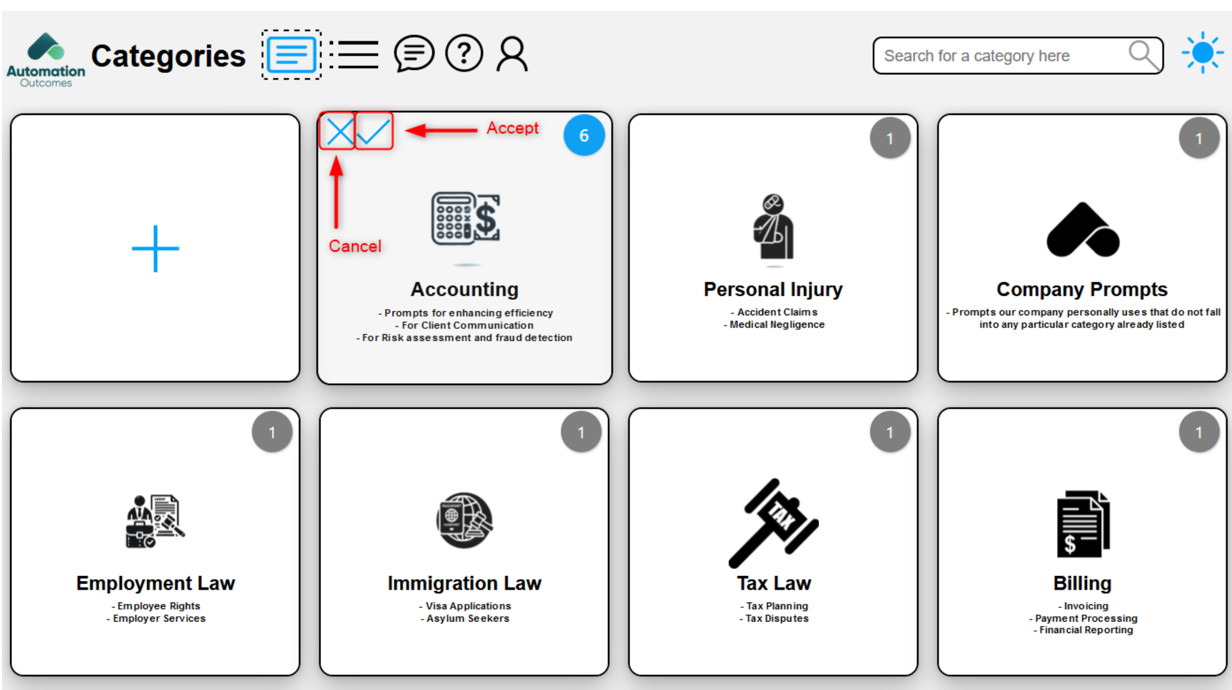
Once created, the list will be automatically updated with the new item.

How to delete an existing Category (Admins only)

In order to delete an existing category, select the delete button seen on a category



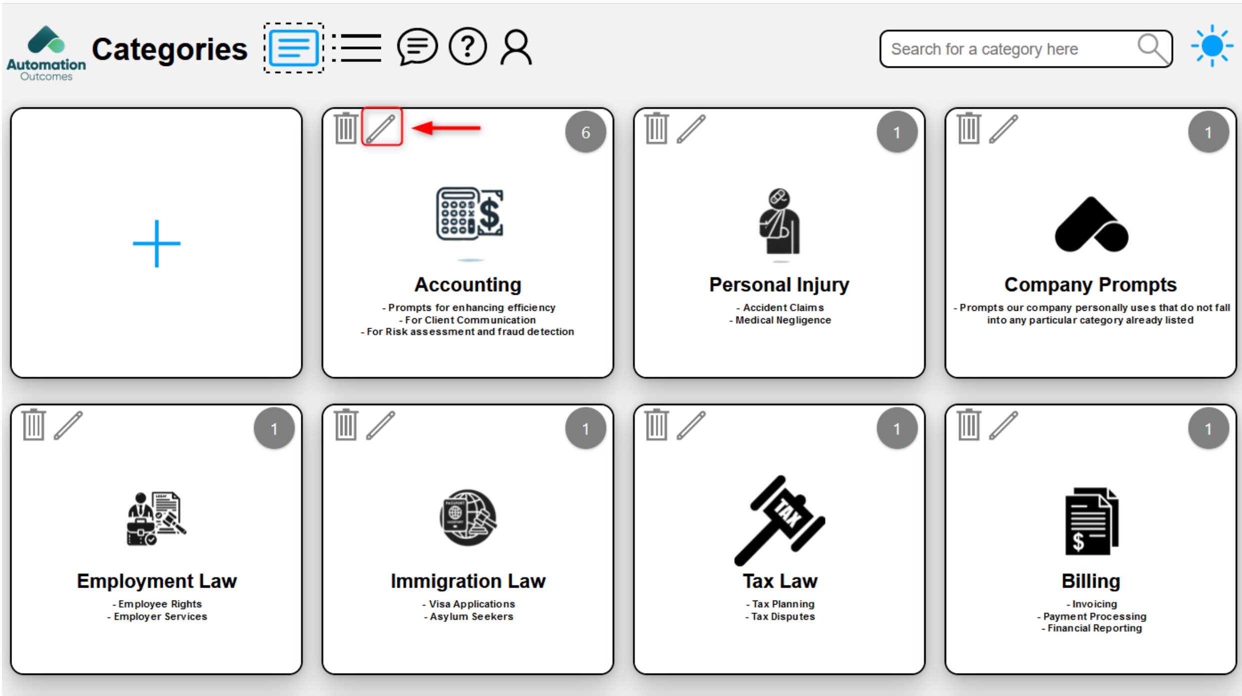
The deletion is not instantaneous, two new buttons will appear, one for confirming the deletion and the other for cancelling the deletion as shown below:



If accept is selected, the item will be deleted from the list and the list will be automatically refreshed, if cancel is selected, the buttons will disappear, and no changes will be made.

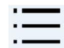
How to edit an existing Category (Admins only)

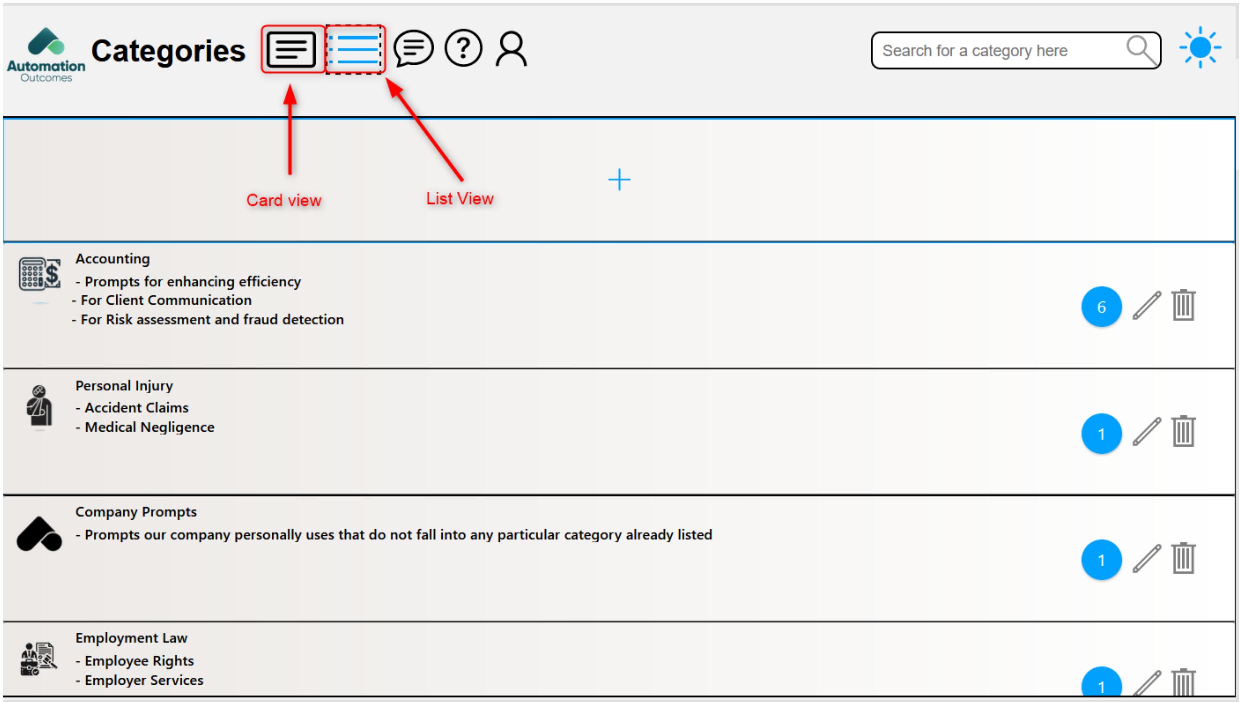
In order to edit a category, select the pen icon on the category item as shown below



Once selected, a pop-up will appear, which will exactly the same as the “Creating a new category item” popup (see section named as such for visuals), this one however will instead allow you to **edit** the currently selected item and all its information.

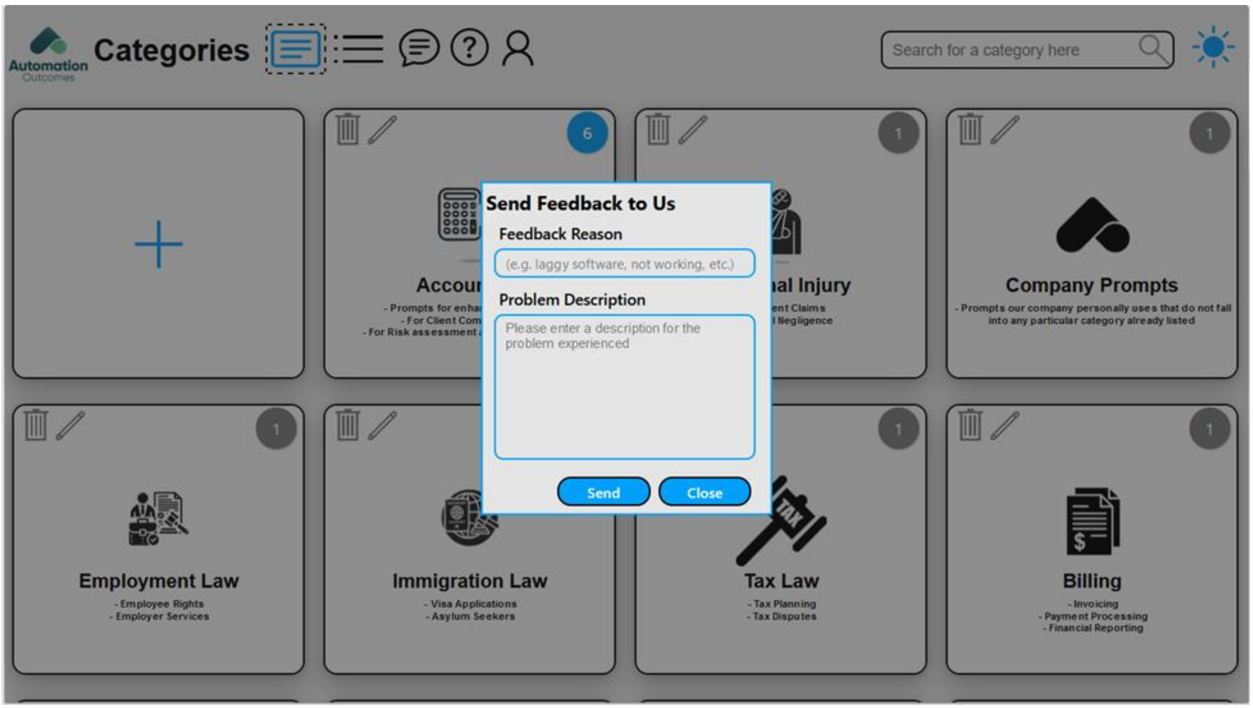
How to switch view modes

The app allows for two different ways to view lists, one with a card view that is seen throughout this guide, and the other with a list view (seen below). In order to switch views, select either the card icon  or the list icon 



How to send feedback to developers from the app

While it is possible to send feedback to our developers via an support email at support@automationoutcomes.co.uk it also possible to send it via the feedback button on the app  selecting this icon will result in a popup that allows a user to enter detailed information on what the issue is and send it to support straight away. Note that this can be setup to also send an email to a custom email address (See section on Flows provided with this guide)



How to switch between dark and light modes

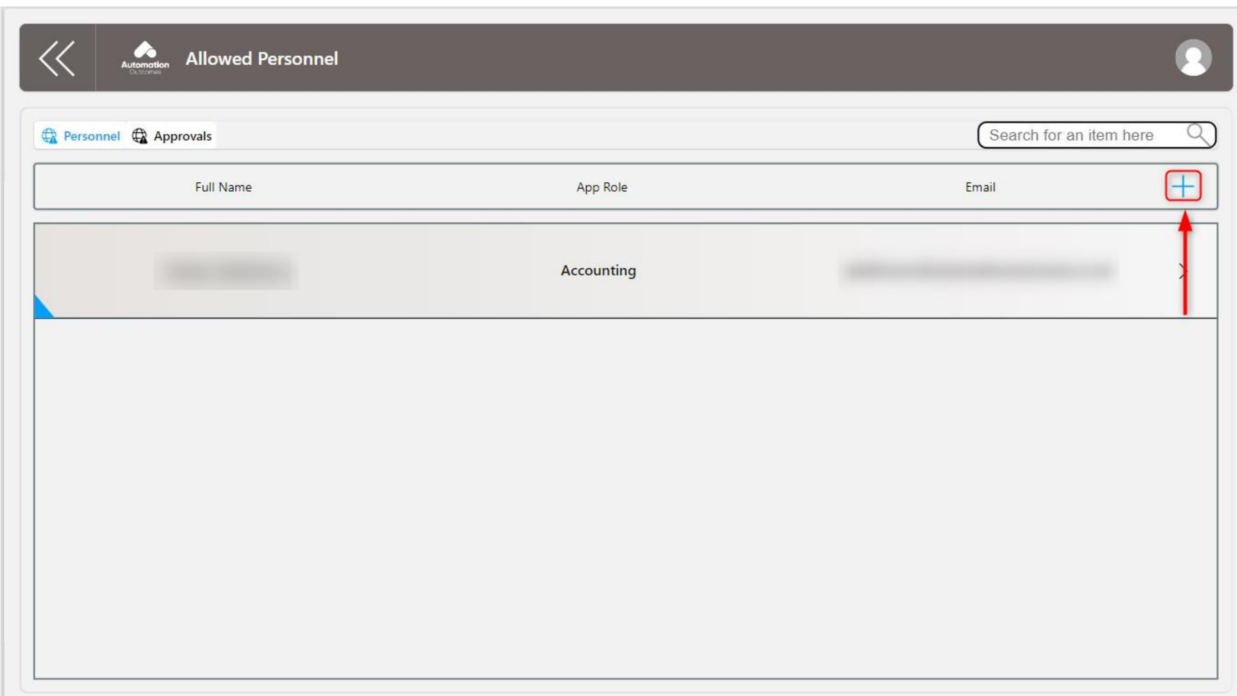
In order to switch between dark or light modes, select their respective icons. Select the sun icon  to switch to **Dark** mode and select the moon icon  to switch back to light mode. Note that the app will always start in light mode unless a custom change is performed in the app code.

How to assign roles to personnel (Admin only)

An admin has the ability to add category supervisor roles to specific individuals in the environment who use the app, this is done via the personnel screen that can only be accessed by a user with an admin role by selecting the personnel icon on the category screen that appears when the user has a role.

In order to assign the first admin, a user has to be added into the "Allowed Personnel" Dataverse table that comes with the app and have the "Global Admin" column set to Yes. Note that only users with a specific security role inside the power platform environment can access this table, this role is "Admin Personnel" and comes with the app pre-packaged, a system admin or an environment maker can then set this for themselves or other users.

The Global Admin can give and take away supervisor roles from other users as well as themselves, to create and set roles for a new user, select the "+" icon on the top right.

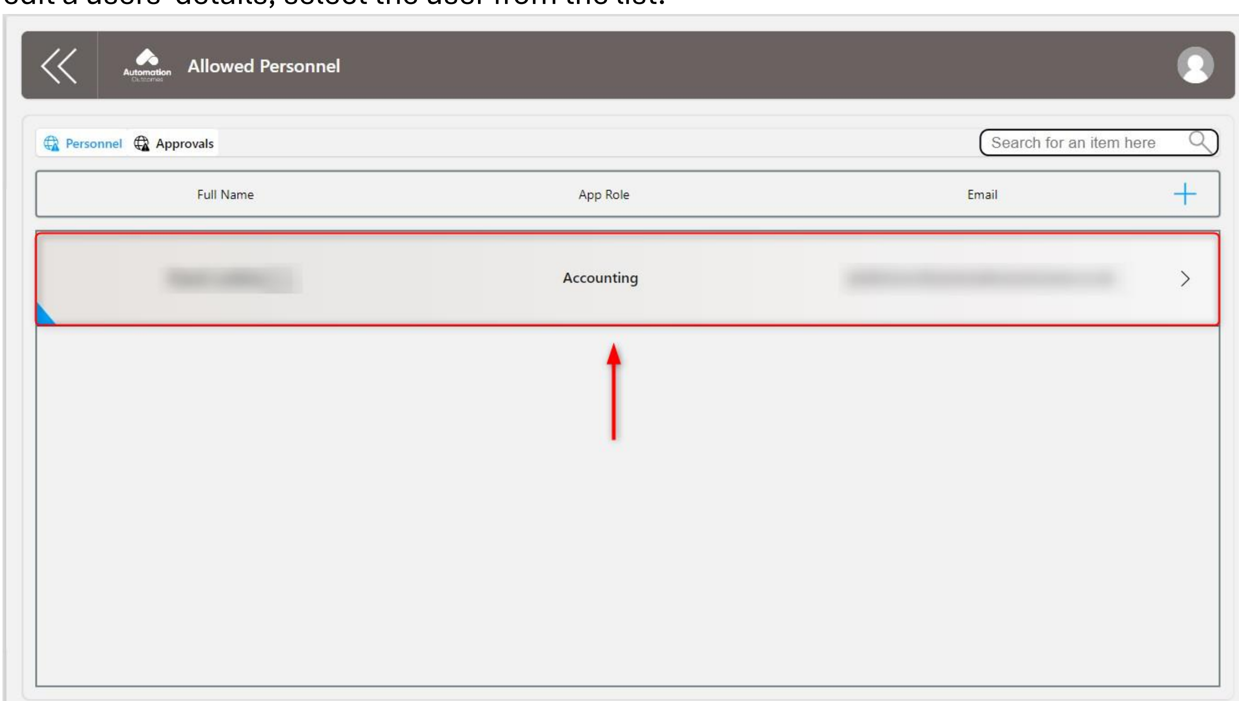


Then fill in the following fields:

Each user has to have:

- A Username
- Supervisor Role assigned (If done by a supervisor, it will only be set to their category)
- Email that is used by the user to sign into the power platform

Once filled in, select submit to save the new user or cancel to stop creating a new user. To edit a users' details, select the user from the list.



And edit the users' details as necessary

Once done, select the submit button save any changes made, or cancel to cancel them.

Please note that once created, the new supervisor user can edit, approve, reject and delete prompts for a particular category, he cannot however, edit his own role, only another global admin can.

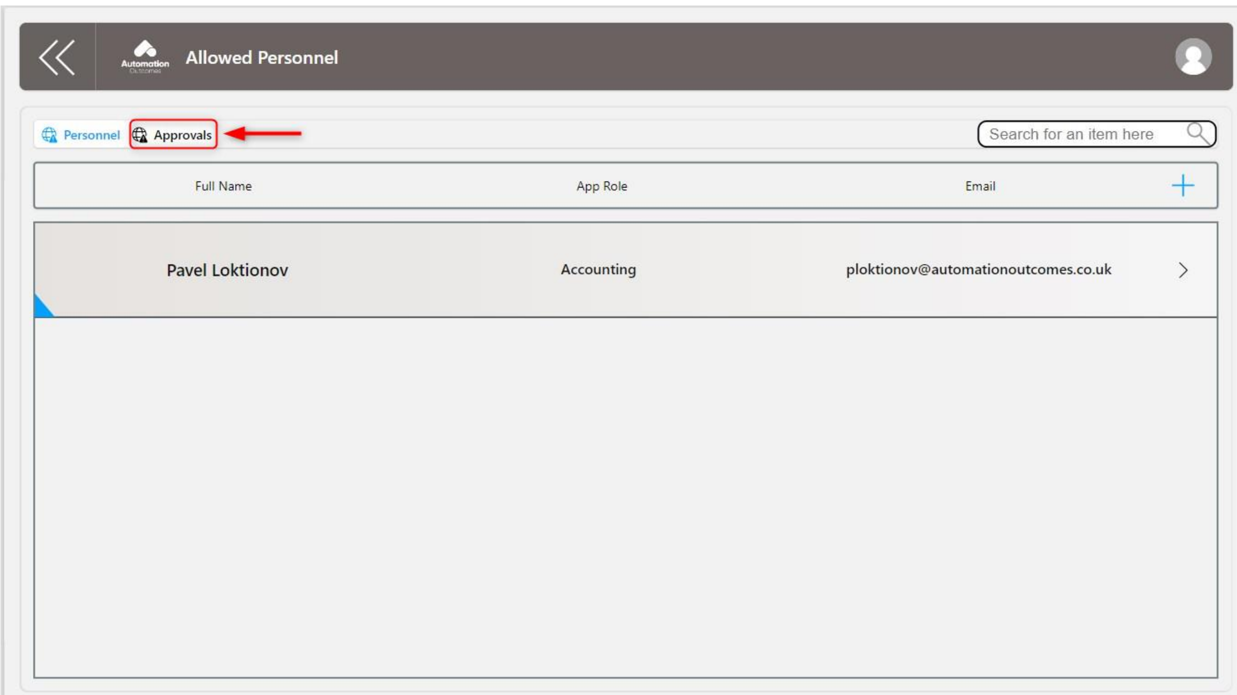
A global admin also cannot make other global admins, only someone with the "Admin Personnel" security role can go into the "Allowed Personnel" table and change a users' global admin status.

How to approve (publish) / reject (restrict access) to a prompt (Admin Only)

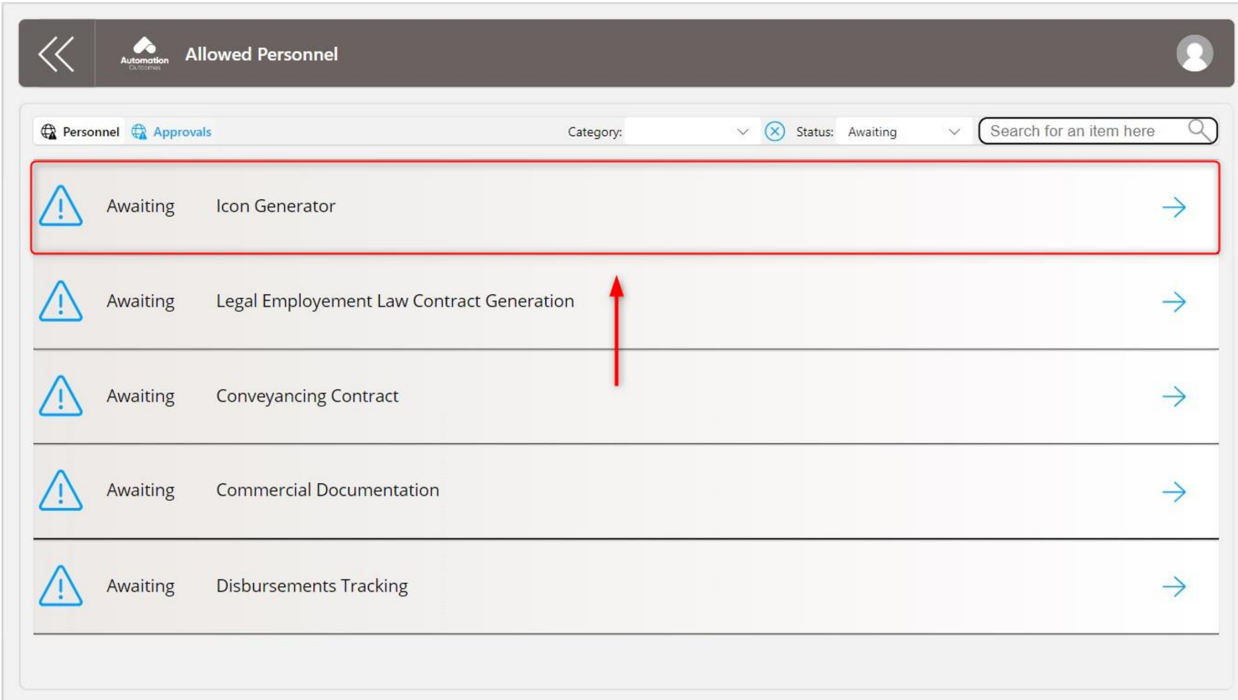
Any type of admin has the ability to either approve or reject a recently added prompt by any user, this process ensures that not just any kind of prompt can be published for general use, as this can cause bloat issues.

The process for prompts being added is as follows, as a prompt is created by any user (including admins) it enters an AWAITING phase, where the prompt is not visible to anyone other than the user that has created the prompt, from here an admin of the category this prompt has been created in or a global admin can approve to publish this prompt after inspecting it or rejecting it if it doesn't follow a specific set policy disallowing it from officially appearing in any other users' instance of the app.

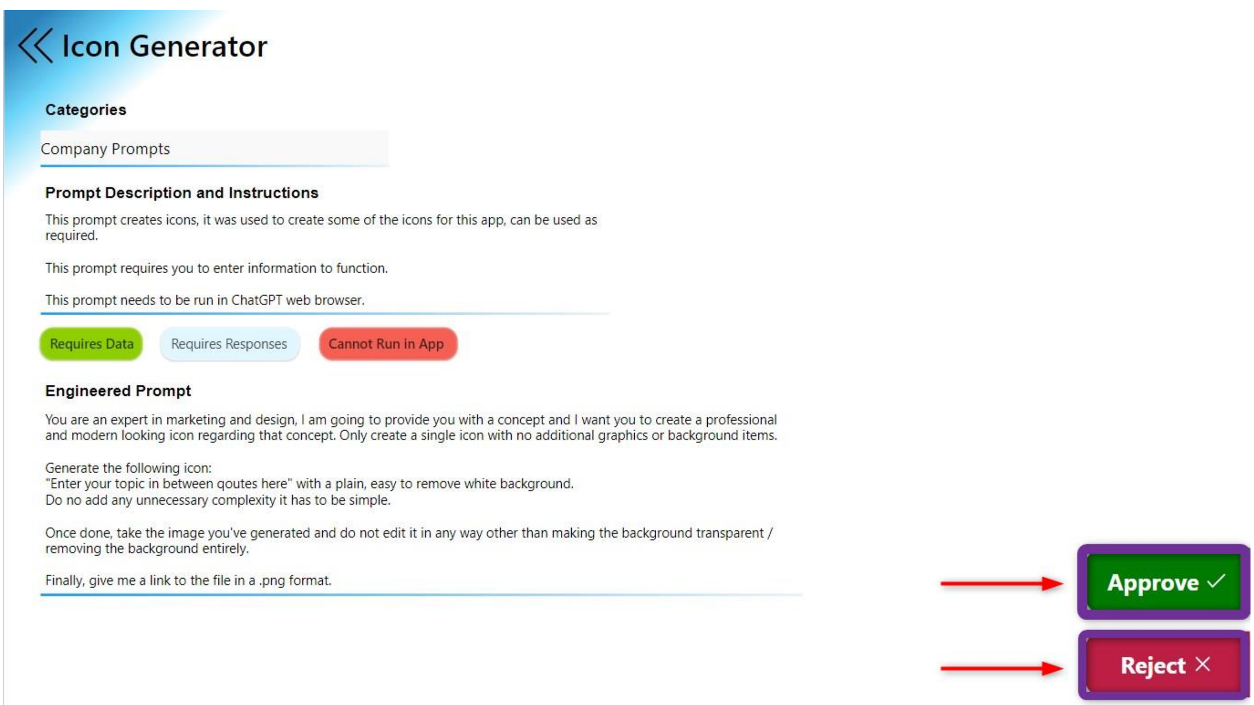
To approve prompts, select the "Approvals" tab from the admin screen



The approvals screen will always start with the status set to "Awaiting" but can be set to "Approved" or "Rejected" if required. From here, select any of the prompts awaiting to be published to inspect them. Also note that supervisor admins can only see prompts awaiting to be published from their supervised category only.



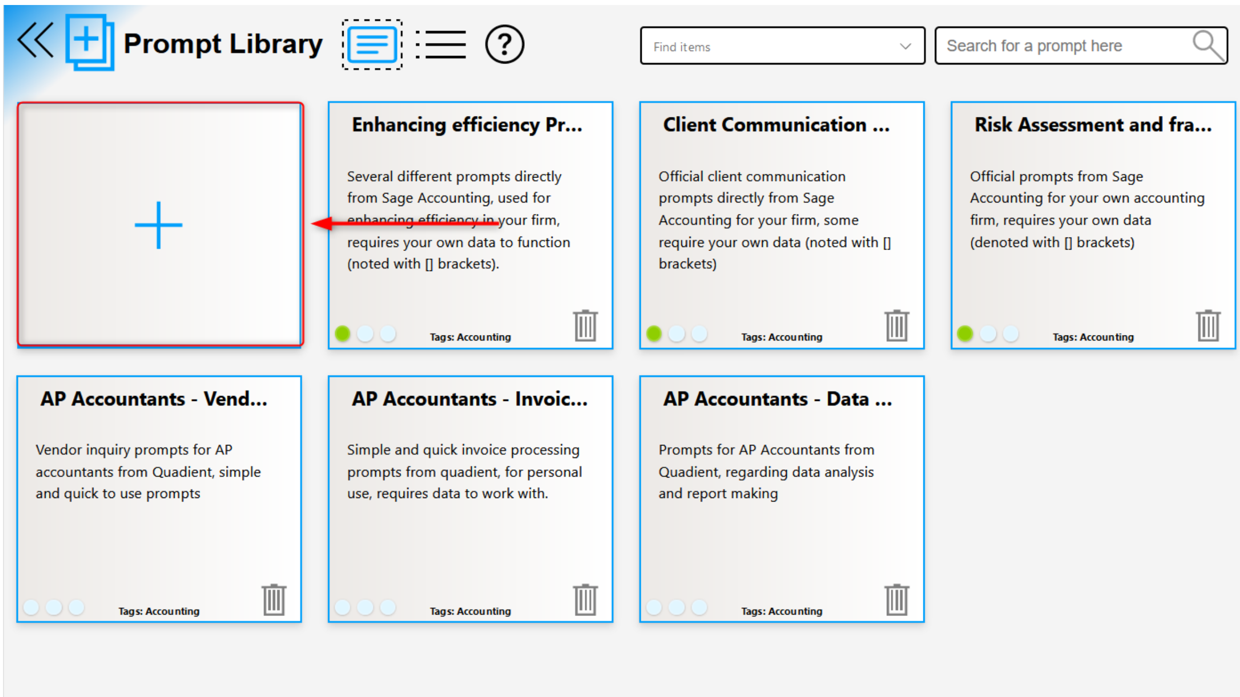
After a prompt has been selected, the following screen will appear, select either the Approve or Reject button as required.



Once approved or rejected a notification will appear indicating its new status and it will be removed from the Awaiting list.

How to create a new prompt

First, select the “+” item, it should be the very first item in the prompt list.

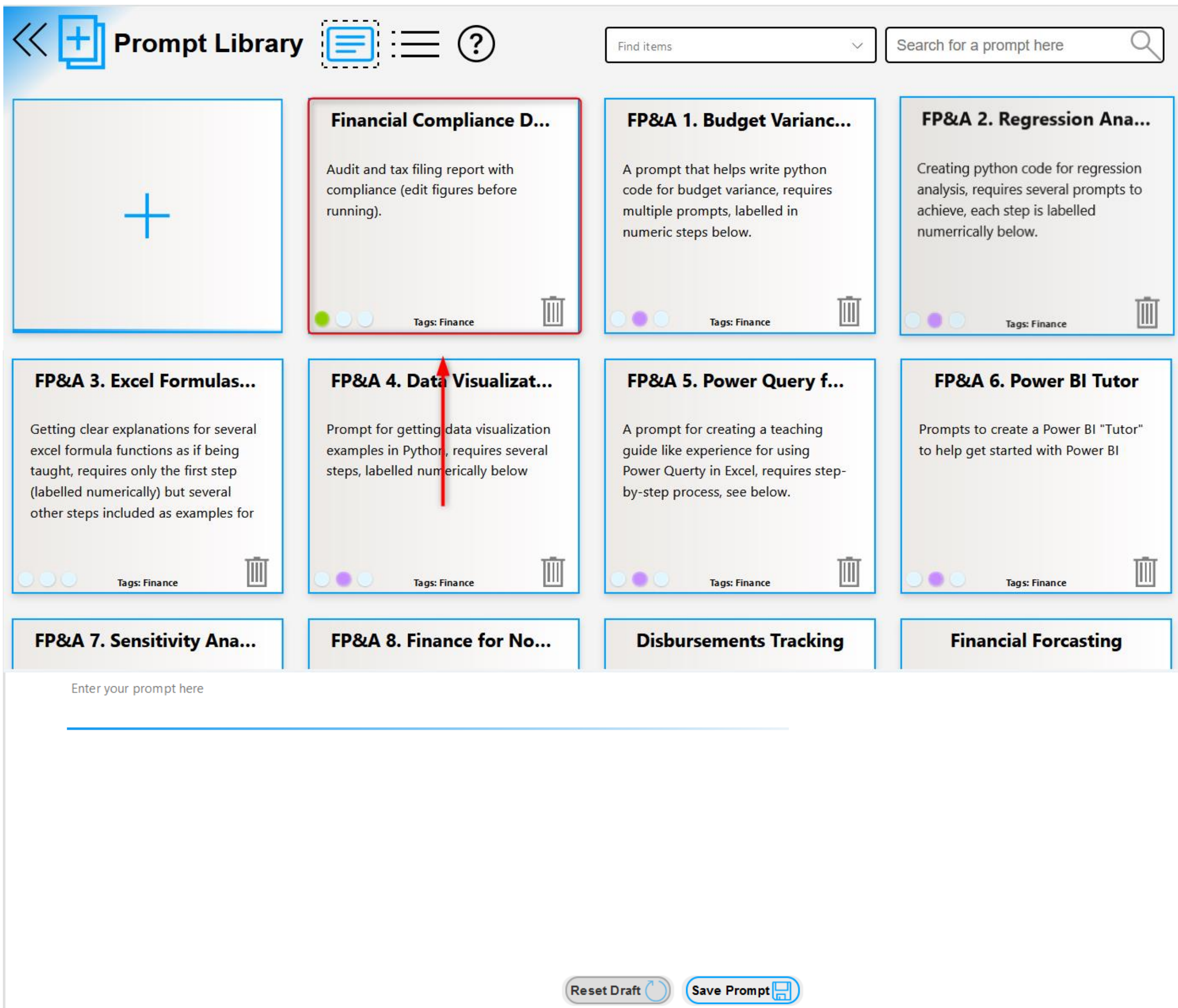


Once selected, a new screen will appear that lets the user to create a new prompt.

Enter a title, category (if multiple, a default should already be selected), the description and instructions for the prompt and finally, the actual prompt that GPT will use. Once done, select the "Save Prompt" button at the bottom of the screen. Once saved the previous screen will come into view and the list will be automatically updated with the new item.

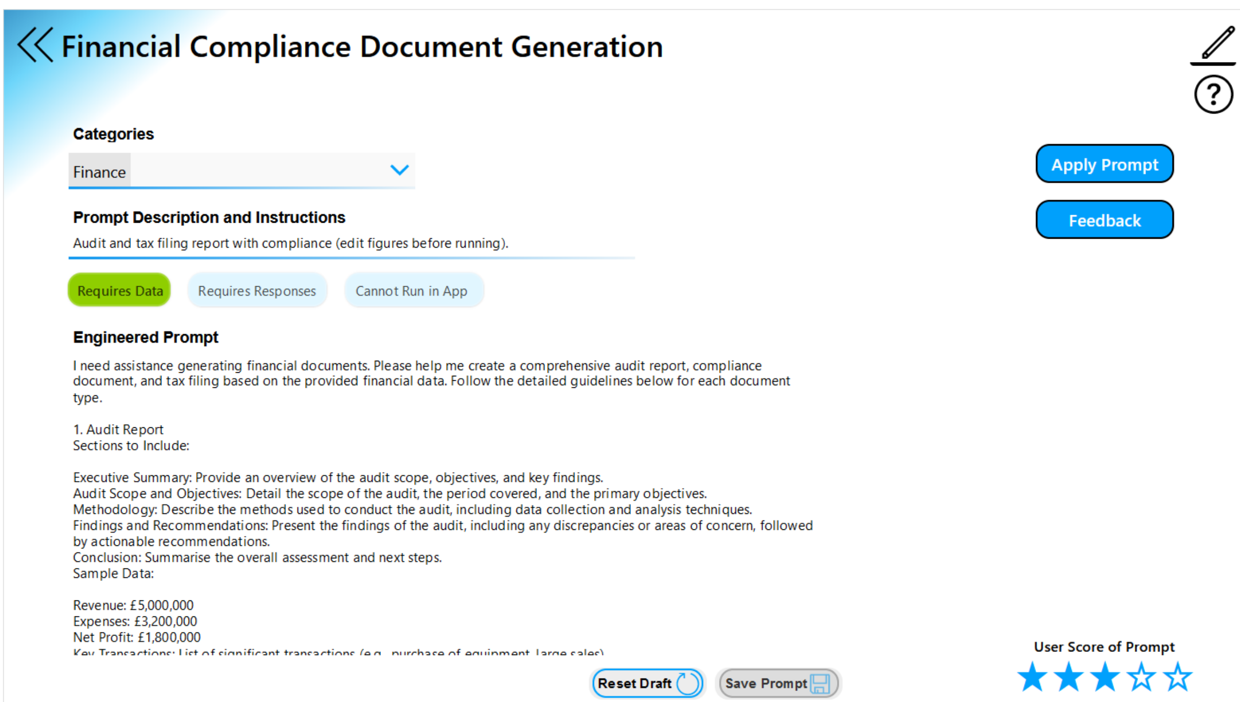
How to edit a prompt (Admin only)

First select any item in the prompt list, the screen will swap to the prompt view screen.



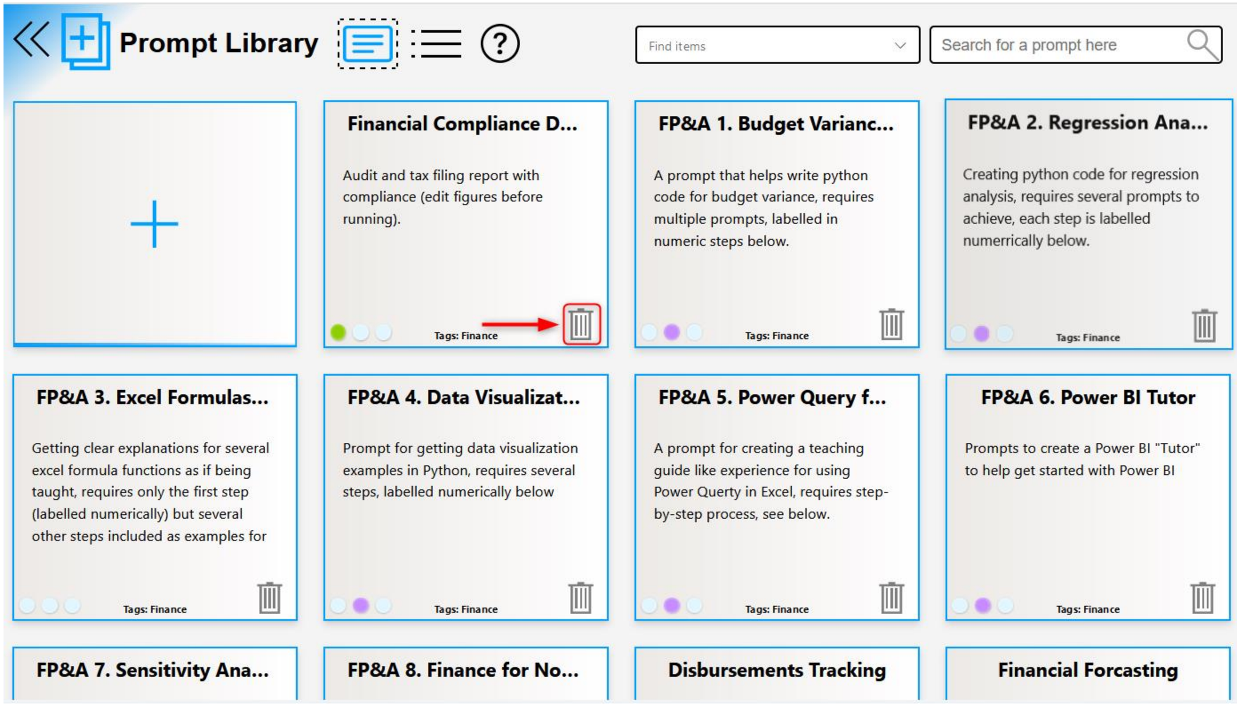
Only an admin has access to edit the prompt in any way shape or form in the view prompt screen.

To edit a field, select it and change as required, if the field is not selectable then the current user logged into the app does not have admin privileges. Also note that the title is separate from the editable form, it can be edited by selecting the pen icon in the top right-hand corner of the screen.

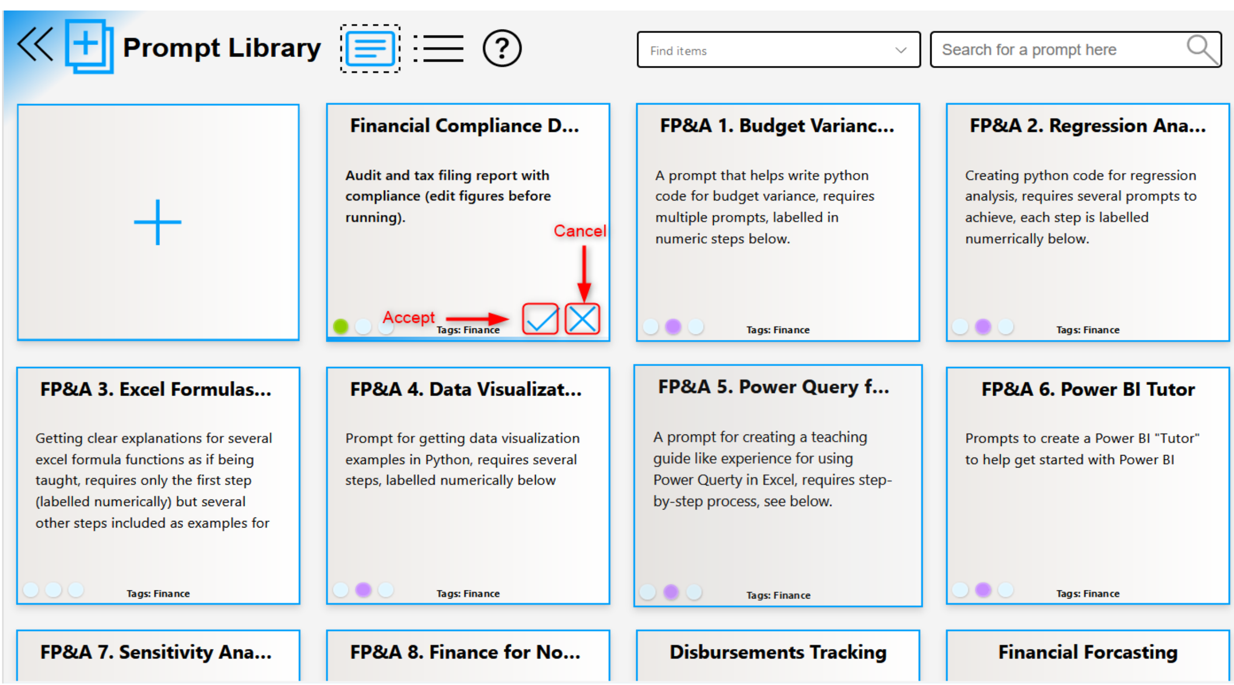


How to delete a prompt (Admin only)

An admin is able to see the delete icon on the prompt list screen



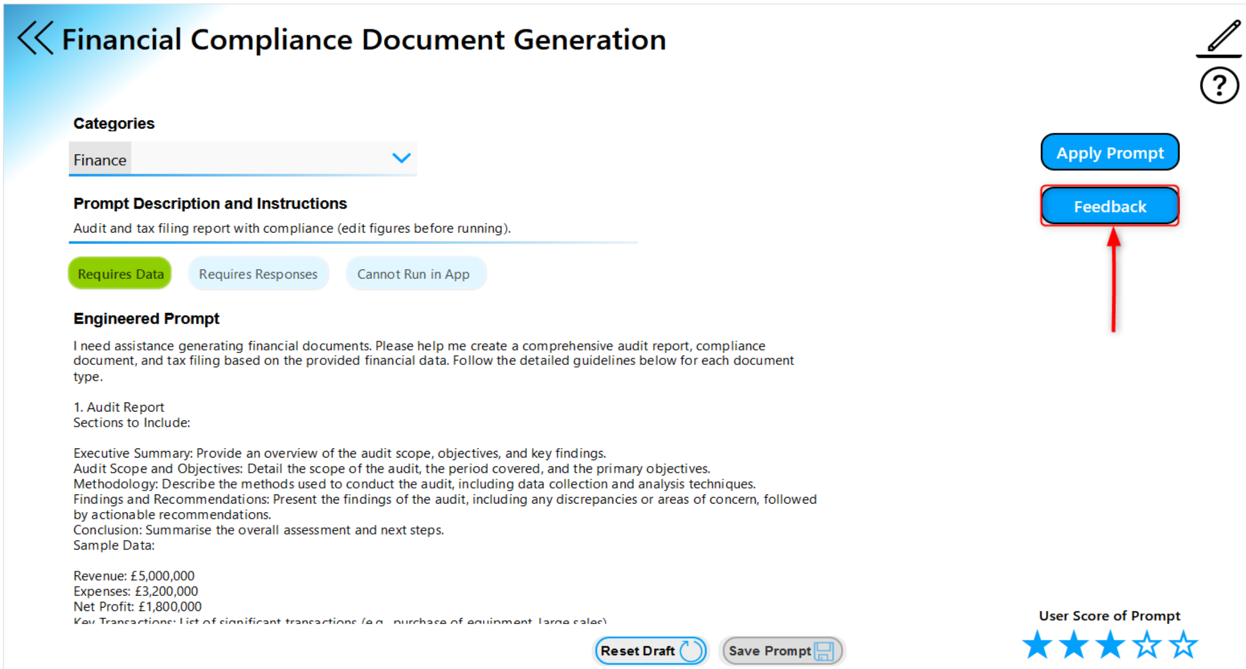
The deletion is not instantaneous, two new buttons will appear when selected, one for confirming the deletion and the other for cancelling the deletion as shown below:



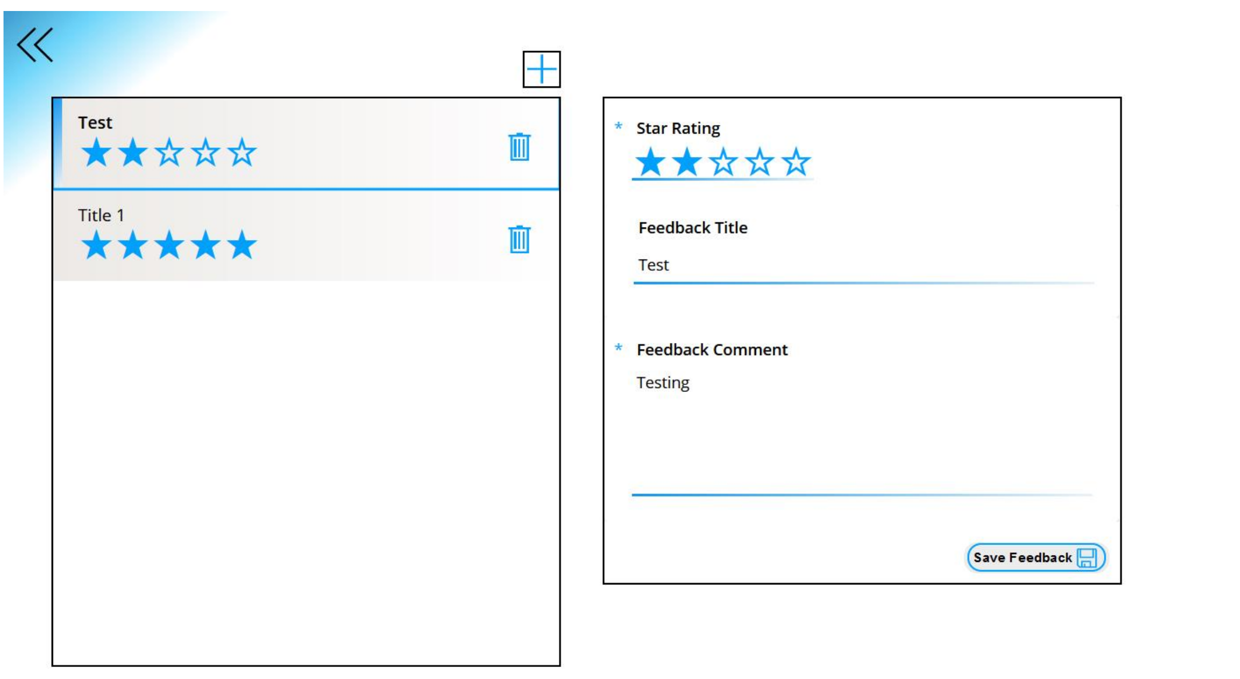
If accept is selected, the item will be deleted from the list and the list will be automatically refreshed, if cancel is selected, the buttons will disappear, and no changes will be made.

How to create, edit and delete feedback for a prompt

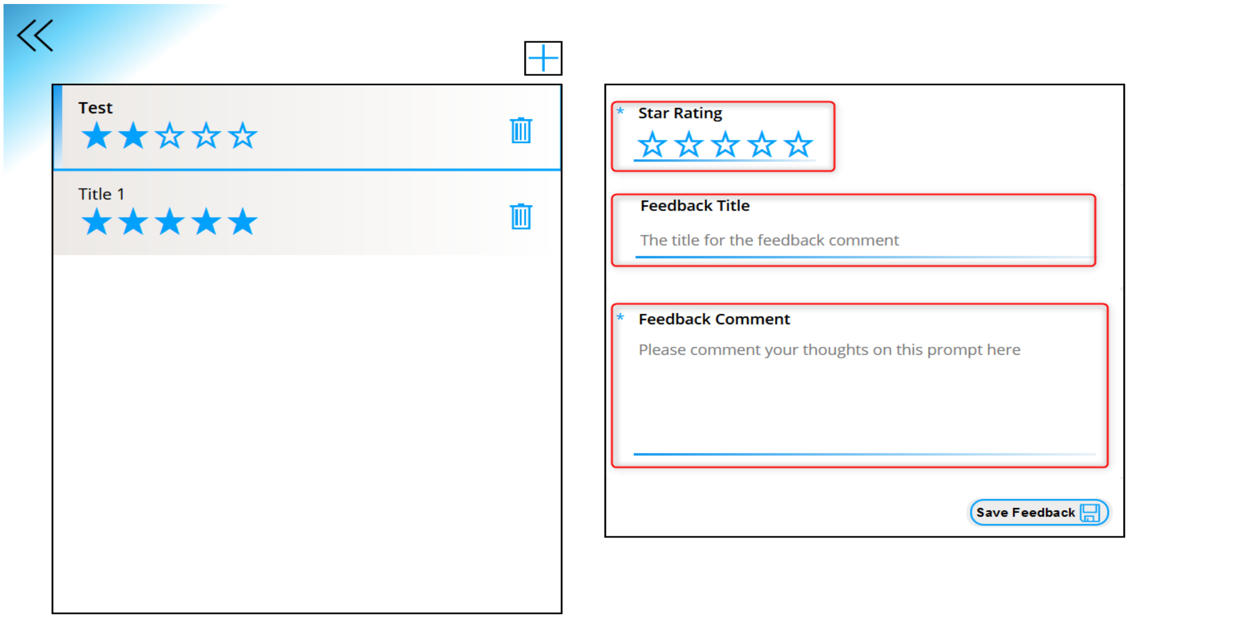
When any prompt is selected it contains inside a button to go into the feedback menu as seen in the image here:



Selecting it will open a new screen, on this screen feedback can be created, edited or deleted per user.

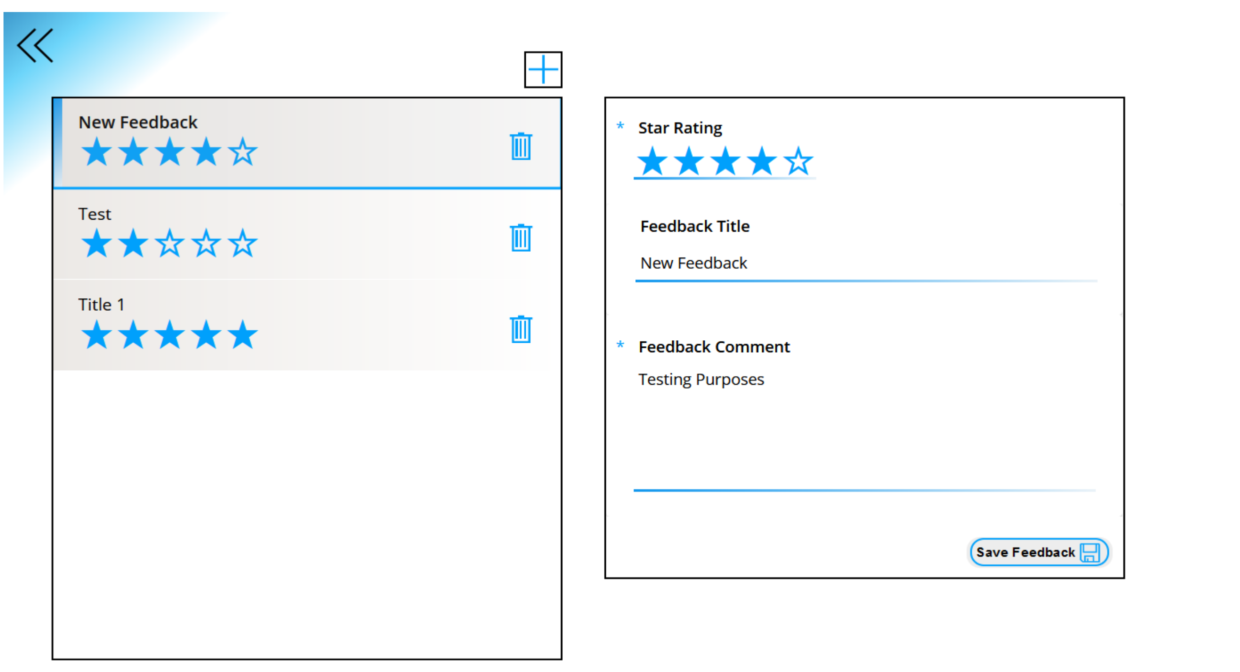


To create new feedback a user has to select the "+" icon at the top of the screen, once selected a new empty feedback form will be started in the right-hand side.

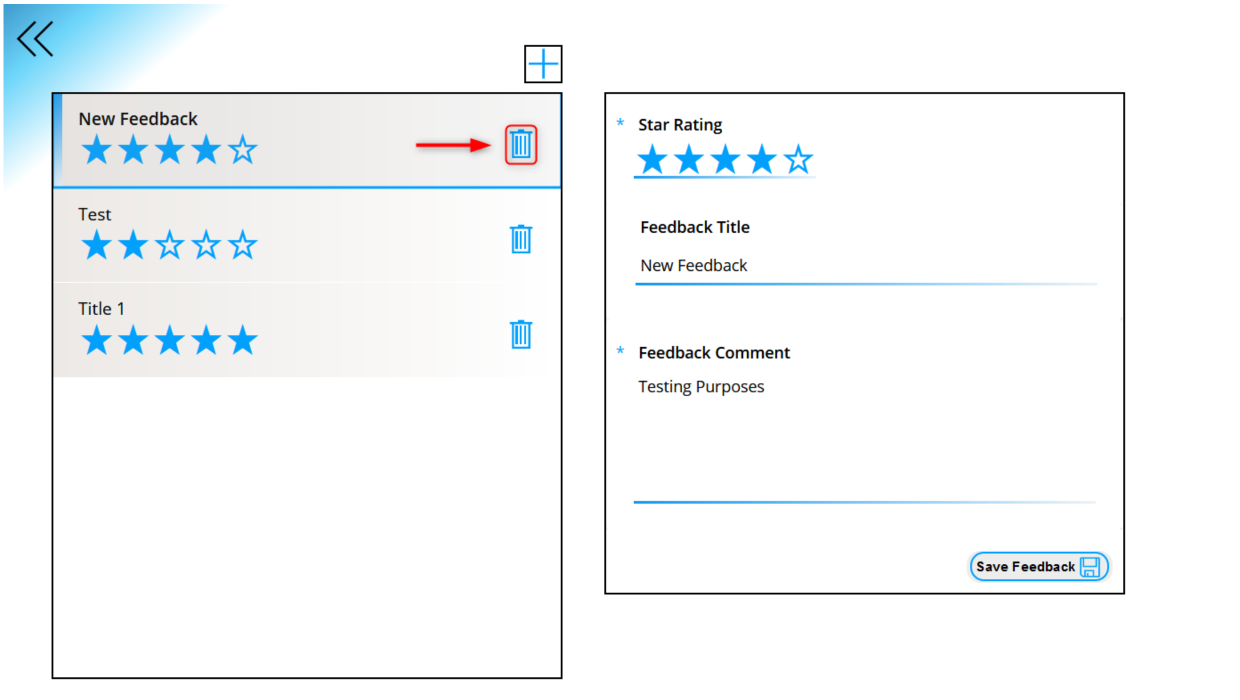


The star rating and feedback comment are required but the title is optional, once done entering the information, select the "Save Feedback" button at the bottom of the form, the list and the average score on the prompt screen will be updated with the new feedback.

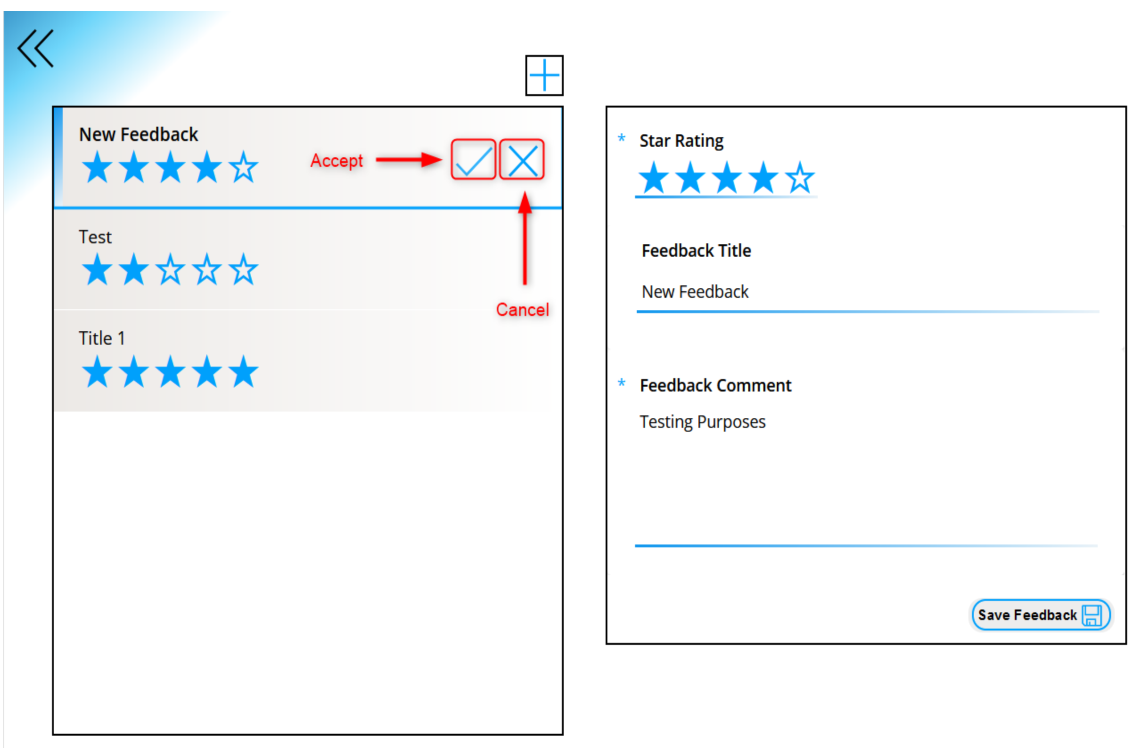
To edit existing feedback (note, on a user-by-user basis, cannot edit others' feedback) select the feedback from the list on the left-hand side, the form previously done will appear with all the details editable once again, save as usual once done editing.



Finally, to delete feedback, select the bin icon next to feedback row, note that only admins can delete other users' feedback, while users can only delete their own.



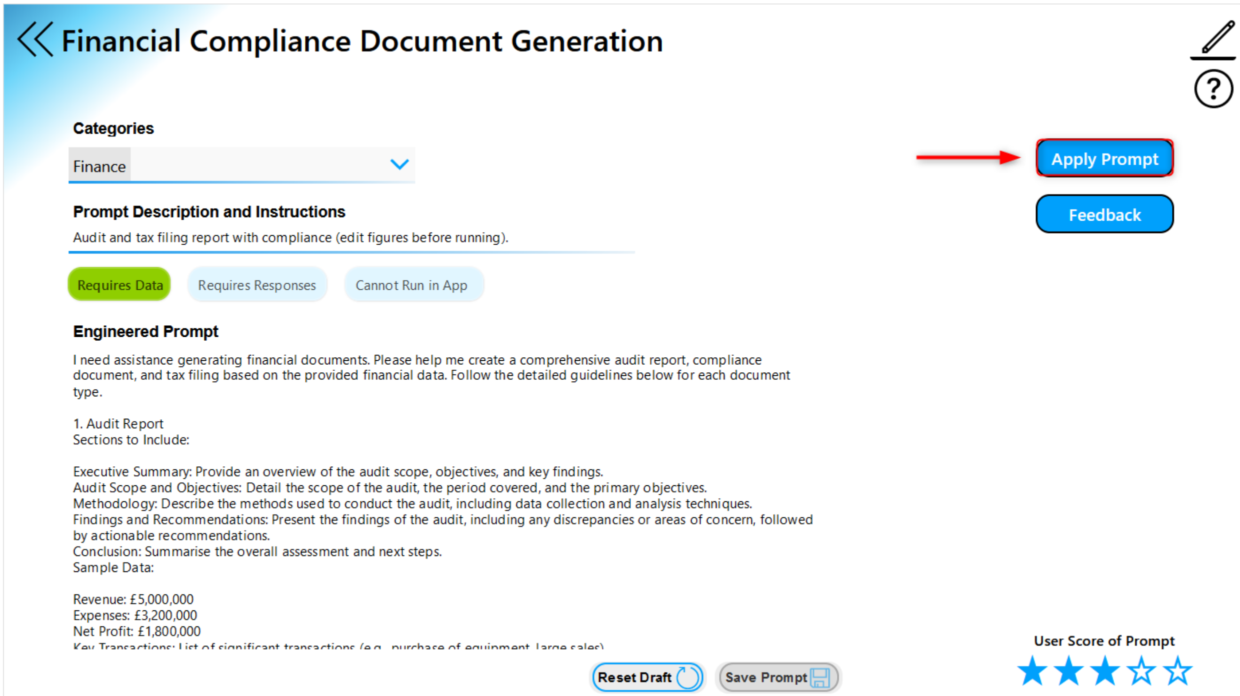
The deletion is not instantaneous, two new buttons will appear when selected, one for confirming the deletion and the other for cancelling the deletion as shown below:



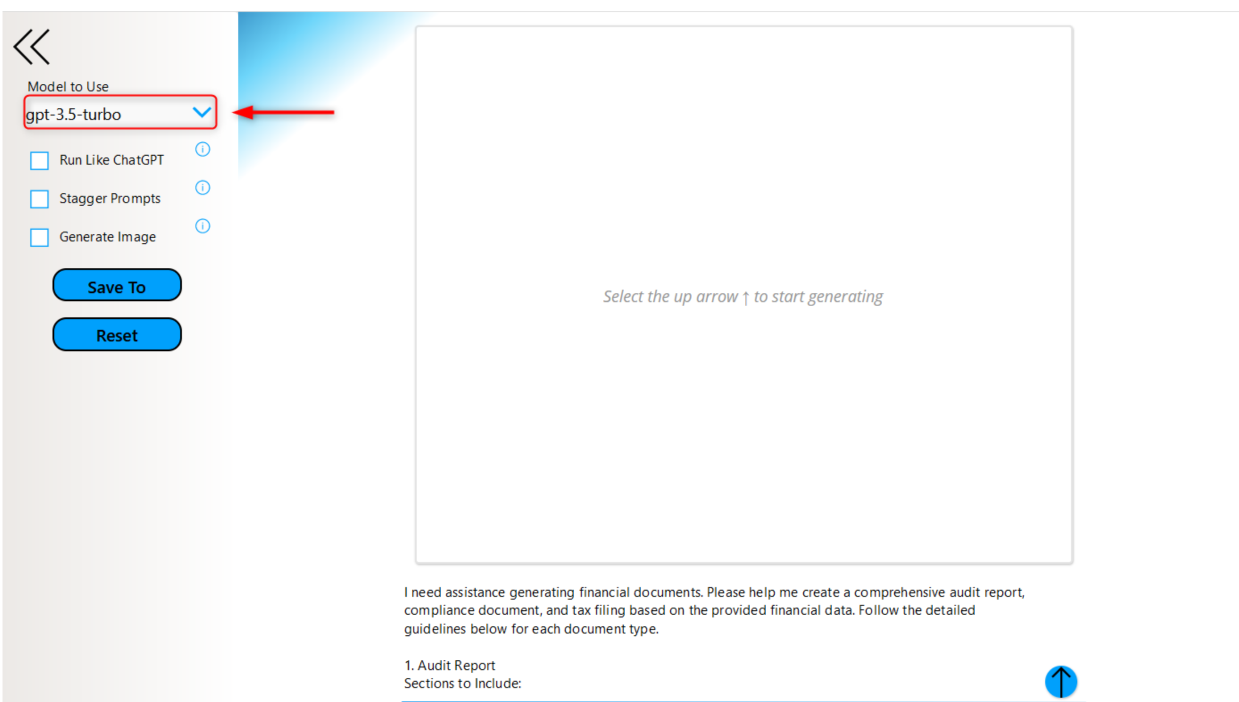
If accept is selected, the item will be deleted from the list and the list will be automatically refreshed, if cancel is selected, the buttons will disappear, and no changes will be made.

How to apply an engineered prompt

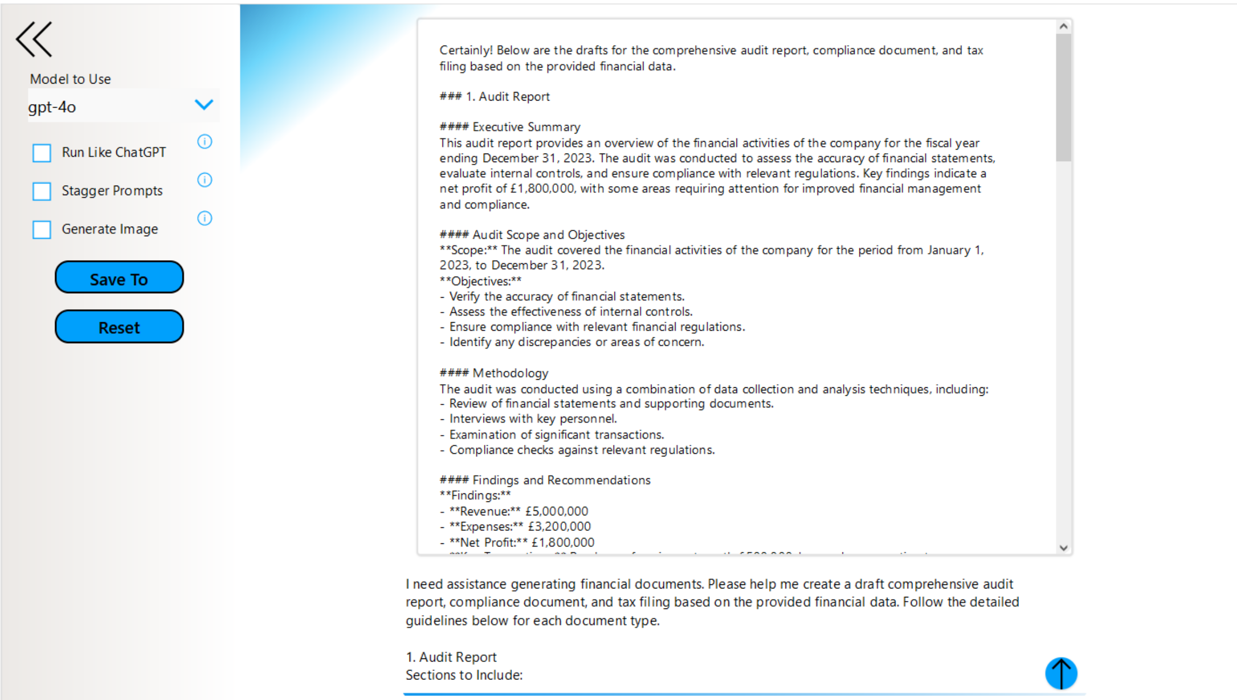
In order to apply the created engineered prompt, select the "Apply Prompt" button on the prompt screen, this will take you to the next screen in which a prompt can be applied.



Before beginning to prompt make sure to select the correct model to run the prompt, this can be selected on the top left-hand corner of the screen



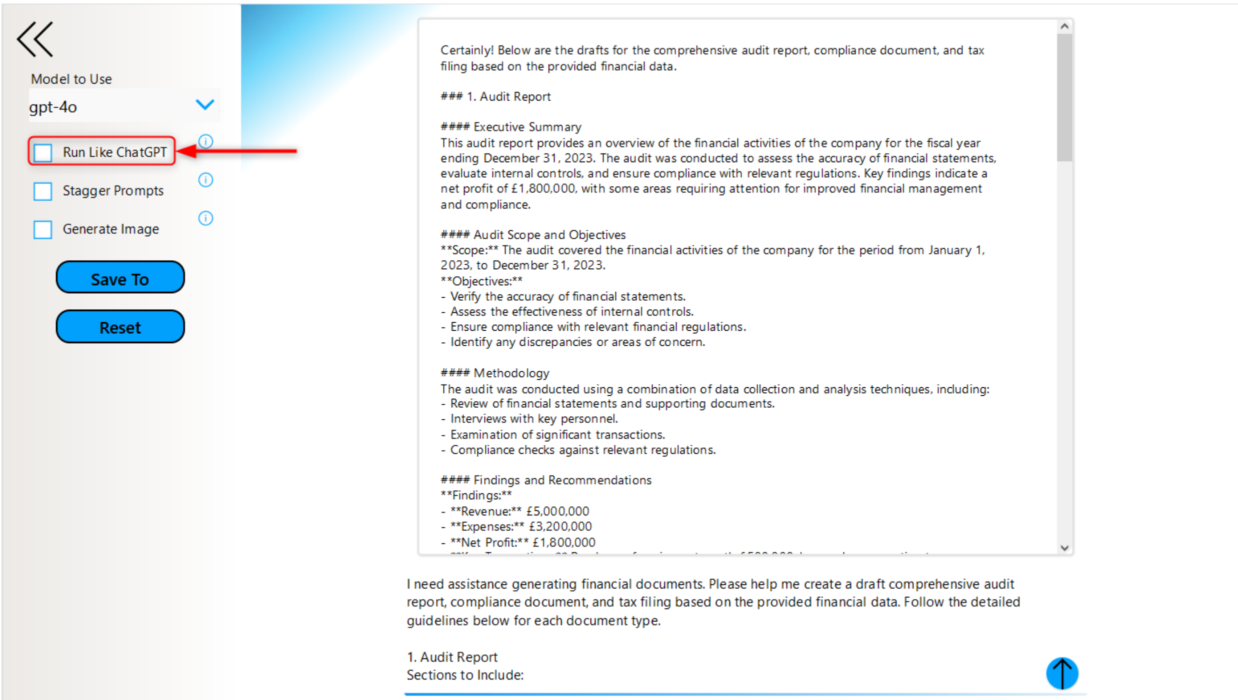
Once an appropriate model is selected note that the engineered prompt from the previous screen is already inserted into the prompt and is ready to go. To start, select the "↑" button in the bottom right corner, it will begin to send the message to ChatGPT.



The answer will be generated and given back in a prompt-by-prompt basis, so a new prompt will generate a new chat, in order to have a similar experience to the ChatGPT website where it is possible to keep prompting the same chat, check the next section on "How to use the Running like ChatGPT Mode"

How to use the Running like ChatGPT mode

To start using this mode, select the “Run Like ChatGPT” checkbox on the left-hand side menu.



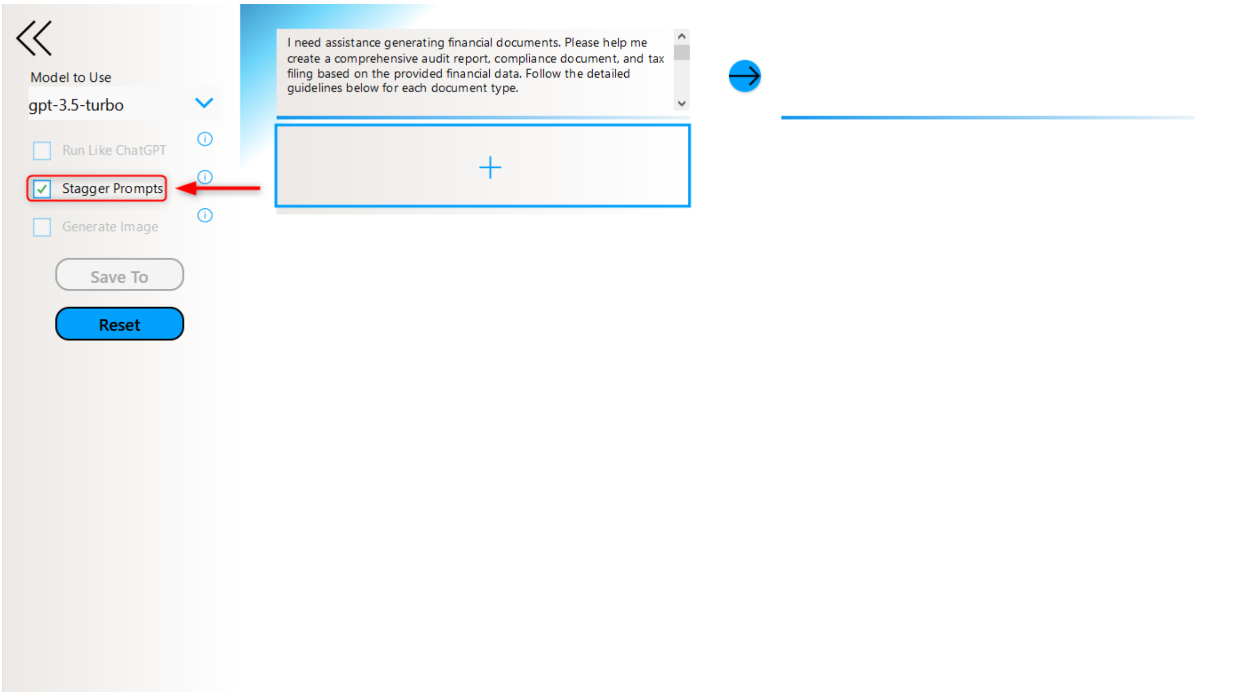
Once selected, the main chat-box will switch to a new mode, one in which the users’ prompts and the chatbot’s answers are visible and the chatbot can now be multi-prompted, so writing in another prompt will use the context on screen already written.

Note that during this mode:

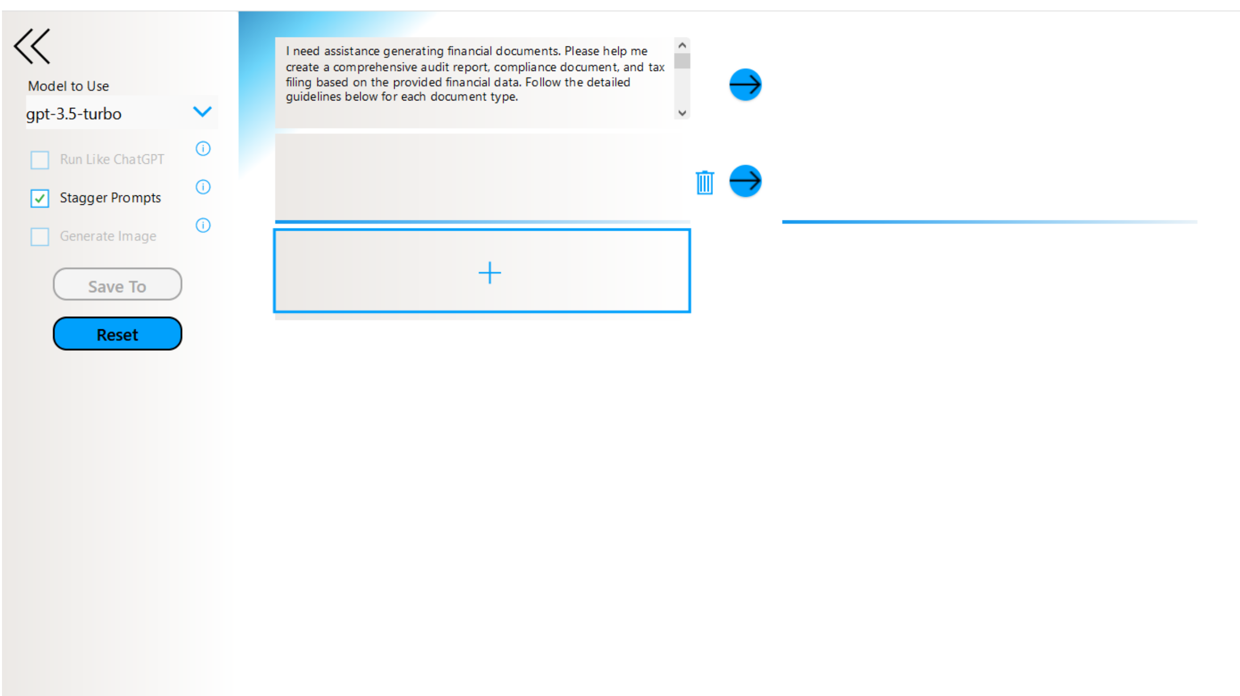
- The API cost for each run will increase depending on how much text has been written, we recommend not going past about 5 long chats
- There’s a hard limit for each model on how much text can be input & output to the API, 98k for GPT 4 and up, 16k for any GPT 3.5 model and 8k for GPT 3 (as of writing 06-2024), more info here: https://platform.openai.com/docs/models/gpt-4-turbo-and-gpt-4
- All other modes will be disabled when using this mode to prevent over-writing one another
- If you need a reference on the API, use the following link: https://platform.openai.com/docs/api-reference/introduction
- If you need a reference on the **costs** of the API, use the following link: https://openai.com/api/pricing/

How to use Stagger Prompts mode

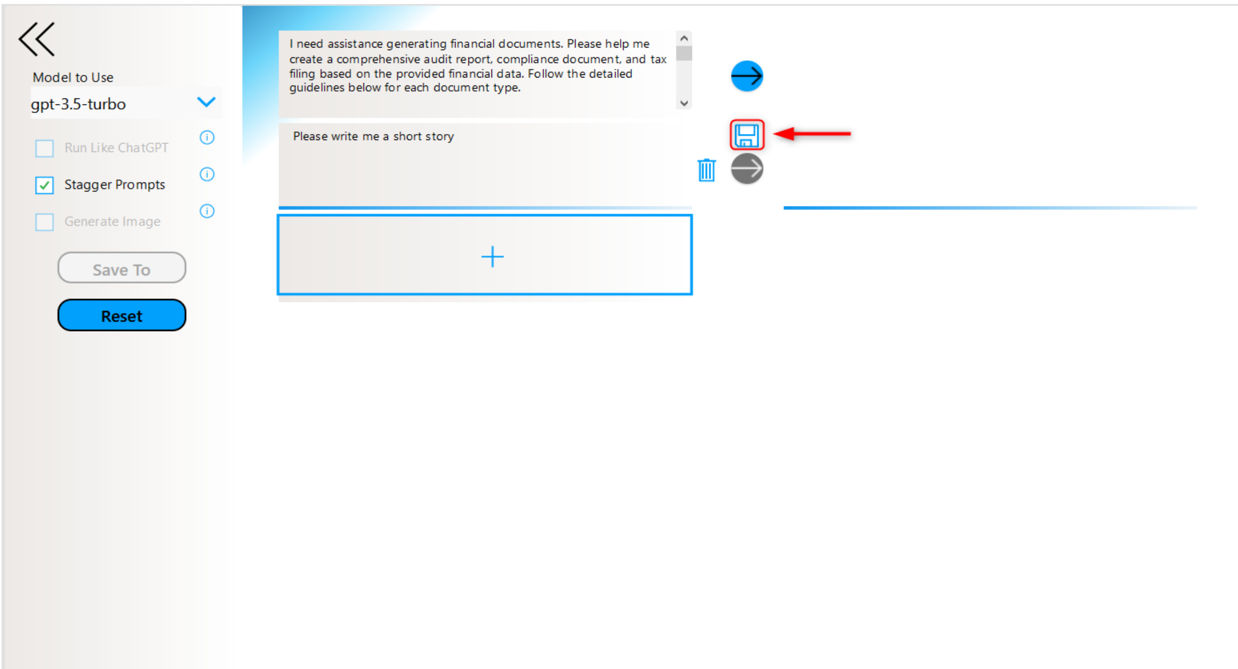
To start using this mode, select the “Stagger Prompts” checkbox on the left-hand side menu.



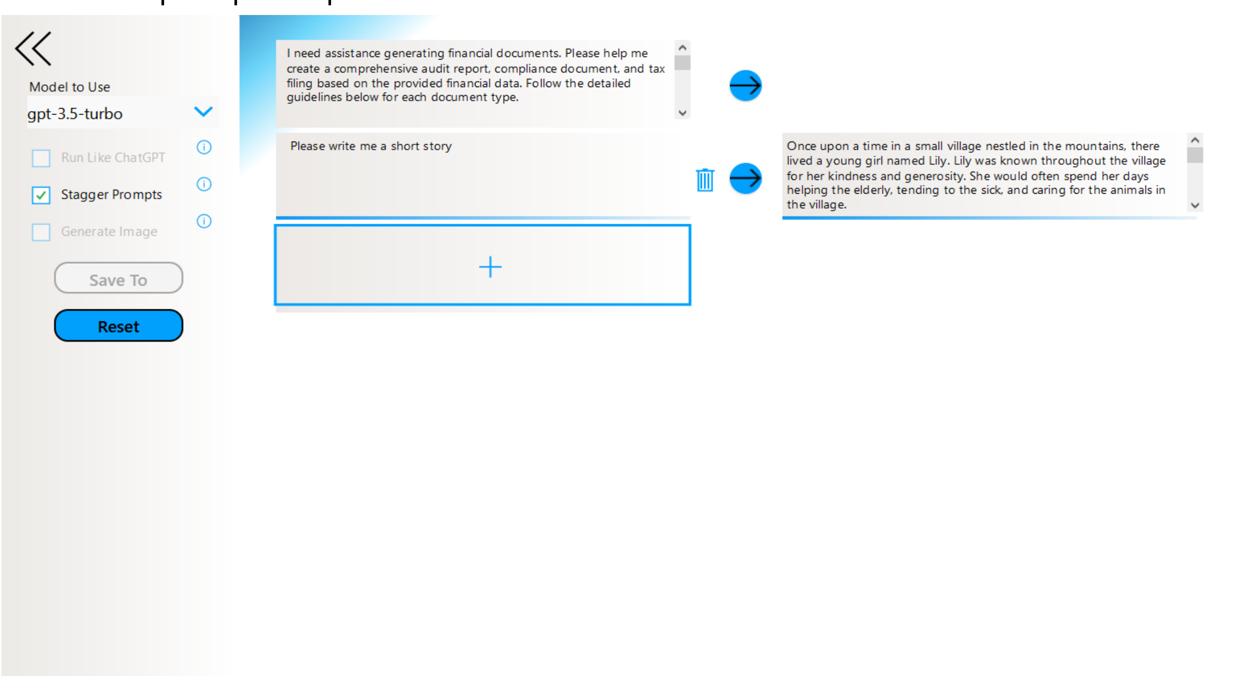
Selecting this will create a new menu that allows stacking of prompts, a row can be added by selecting the “+” icon below the previous row.



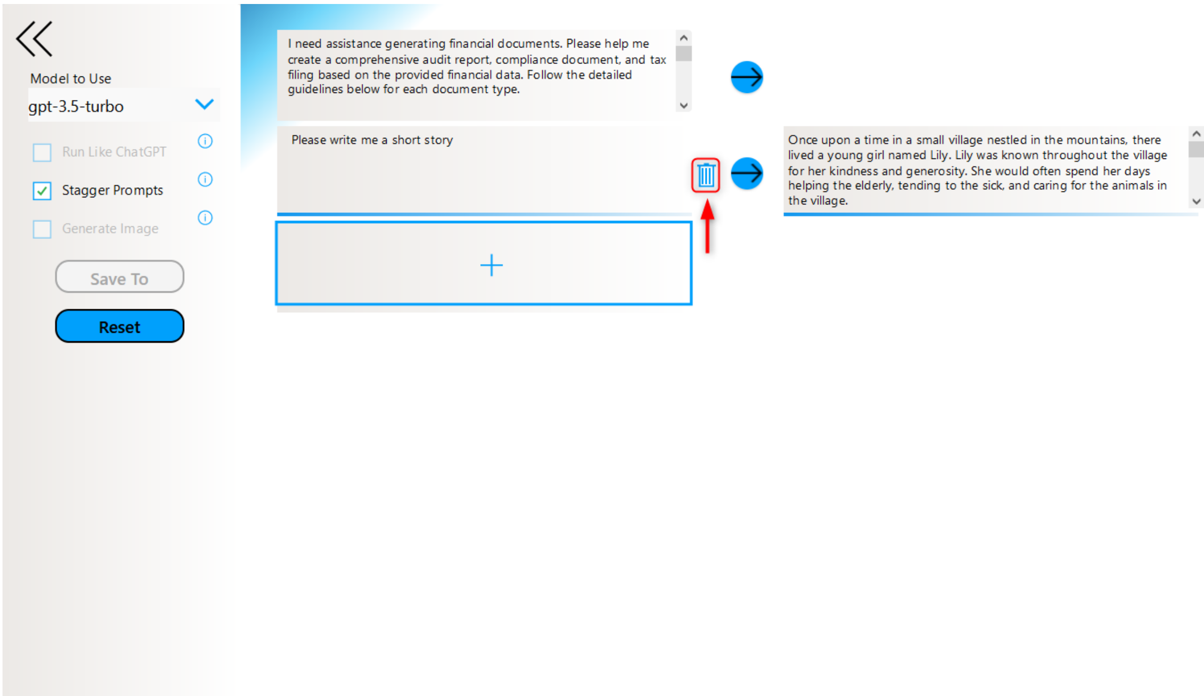
Each of these rows contains a prompt column on the left and an answer column on the right that are completely independent of each other. When writing a prompt into a new row, the system requires the user to save the prompt before running it, otherwise it will not continue.



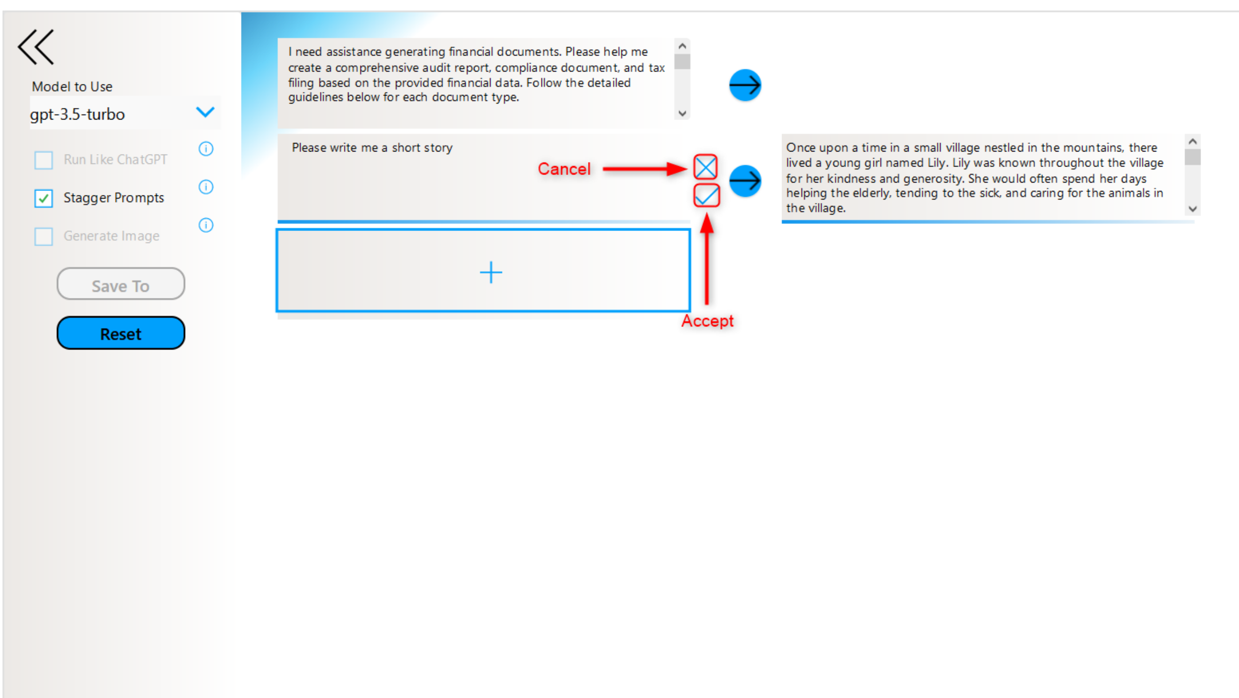
Once saved the prompt can be run, to do so select the "→" button of the respective row, this will run the prompt and produce an answer in the answer column.



You can also delete a stacked prompt by selecting the bin icon next to the run icon.



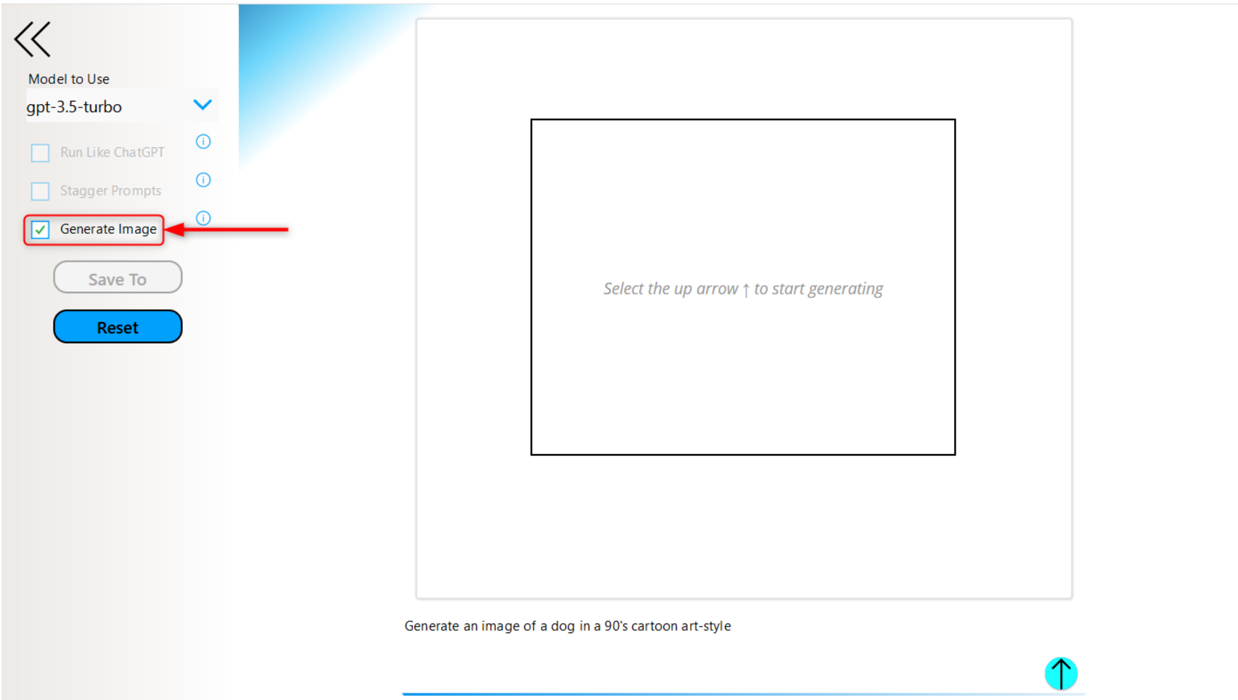
The deletion is not instantaneous, two new buttons will appear when selected, one for confirming the deletion and the other for cancelling the deletion as shown below:



If accept is selected, the item will be deleted from the list and the list will be automatically refreshed, if cancel is selected, the buttons will disappear, and no changes will be made.

How to use Generate Image mode

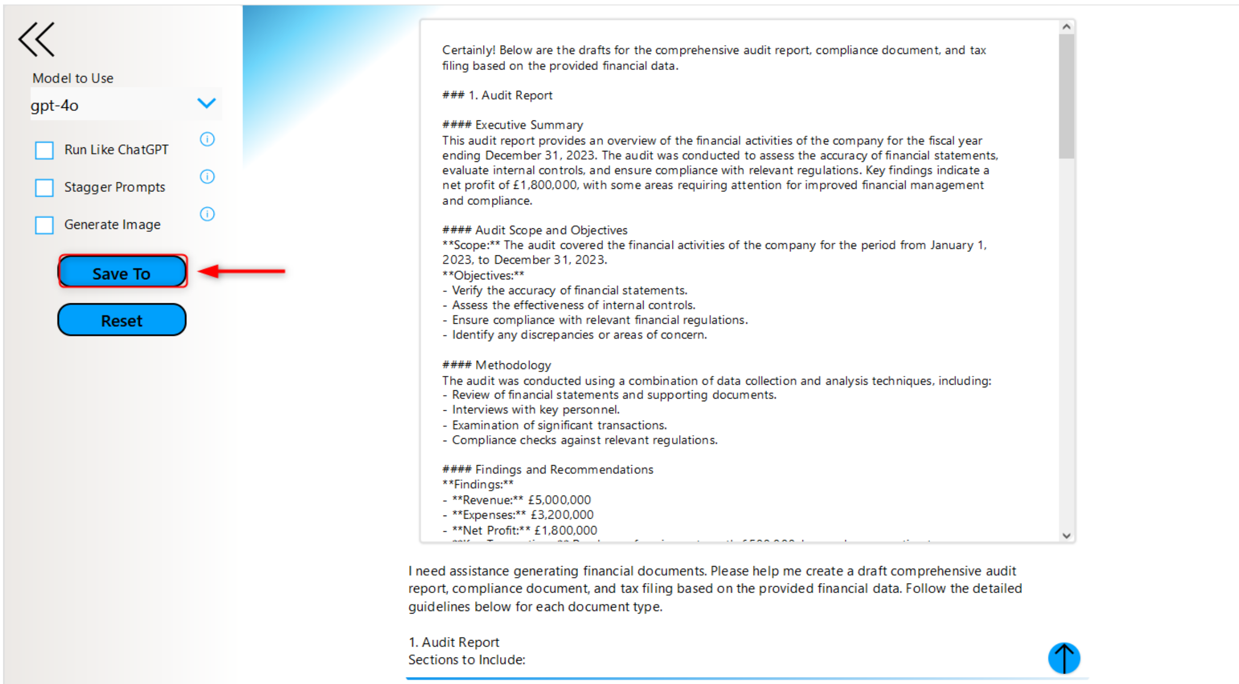
To generate an image using a prompt, select the “Generate Image” checkbox on the left hand-side menu.



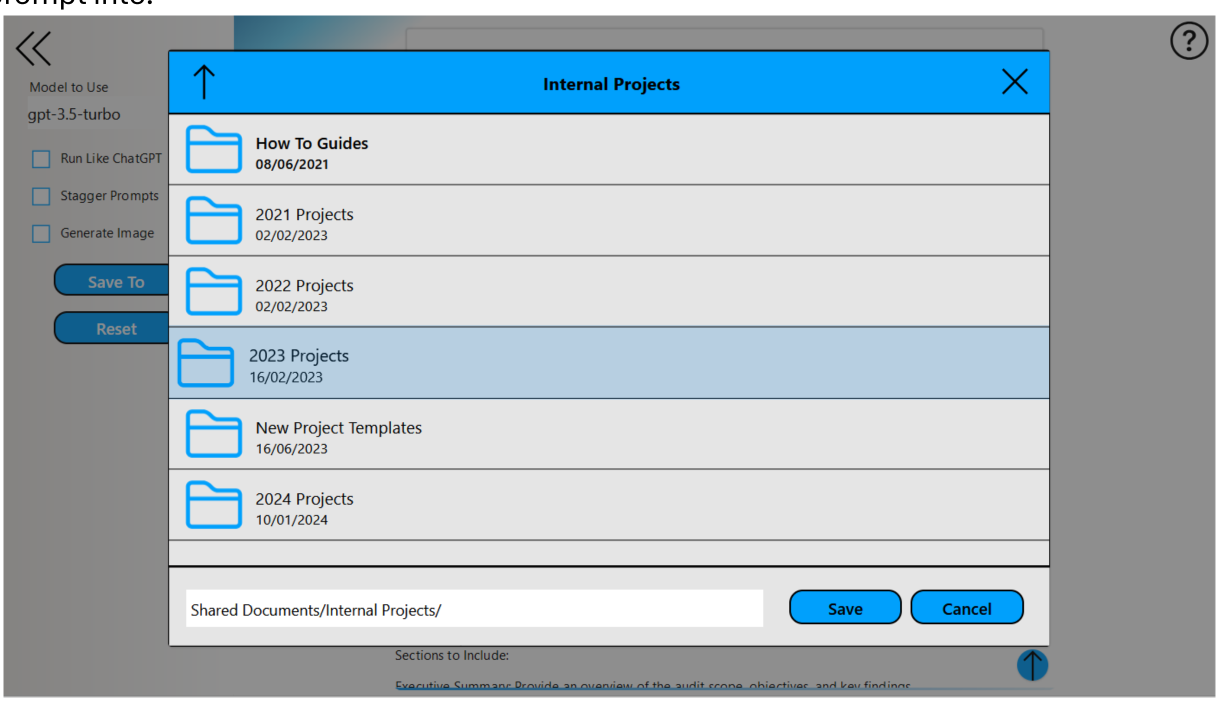
Enter a prompt and select the “↑” button to begin generating an image. Please note that image generation uses the image model “DALL-E-2”, and this cannot be changed as of writing (06-2024) as no other model is currently available.

How to save prompt to a word document in SharePoint

To save a generated prompt into a word document, select the “Save To” button on the left-hand side menu



A pop-up will appear, that incentivises the user to provide a path in which to save the prompt into.



Select a path like in any other folder-system and then select the Save button to save the file.

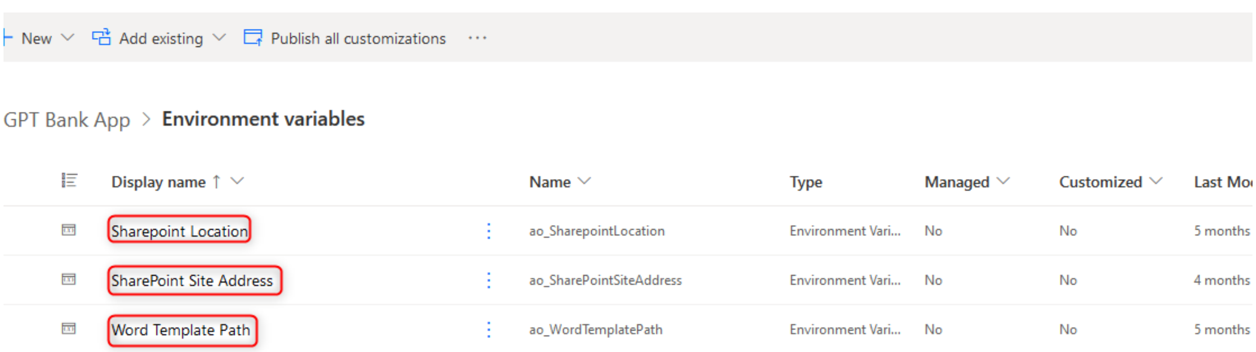
Please note the following regarding this function:

- The name of the .docx file will be the same as the name of the prompt
- In order to save the file a word template file will be required with a simple single input parameter saved somewhere on the SharePoint (More information in the Flows Section below)
- If the SharePoint system has more than 5000 items (files and folders) a different system will **need** to be implemented by the developer, though this can be done manually if the reader is comfortable enough with using Power Apps & SharePoint, here's a link to a video that explains how to implement this https://youtu.be/TmRFAP7xTwk?t=642

Power Automate Flow – Saving Generated Responses from GPT

The following flow is responsible for saving responses from GPT in the apply prompt screen: APP Button – Export to Word Template, as the name implies, the prompt is saved using a word template .docx file.

The inside of the flow does not matter for this guide but can be edited from the solution if need be, what is more important is the environmental variables responsible for being able to save the file, the following variables need to be filled in the solution for this flow to function:



SharePoint Location - The SharePoint URL location of the site, usually found by simply going onto the SharePoint site and copying the top URL e.g. https://CompanyName.sharepoint.com/sites/CompanyName

SharePoint Site Address - The site address of the SharePoint site to use, the setup for this variable is guided by the website on how to get this value. A connection will be required to set up, once created, a site value will be available to select.

Word Template path - The file path in SharePoint to the word template file that will be used as a base for storing the responses, please look into how to create a very basic word template file or ask the developer to provide one. The file path should resemble something like: /Internal Projects/2024 Projects/App/Template.docx, it should not contain the root (Shared documents in this case), only the folder and files after the root.

Power Automate Flow – Sending Feedback to Developer

This flow can be safely left alone as its sole purpose is to send an email to the developer of this app, the developer's email can be found in the flow as well if it isn't functioning as expected (should be support@automationoutcomes.co.uk). Note that this flow requires an outlook connection to function.

Power Automate Flow – Getting SharePoint Files

This flow can safely be ignored, it simply gets all the files from the SharePoint website to display the file-folder system in this app.