



GenerAlt
App Pre-Requisites
Date: 03'th December 2024
Version: V1.2



Resources required

The following resources are required to run this app:

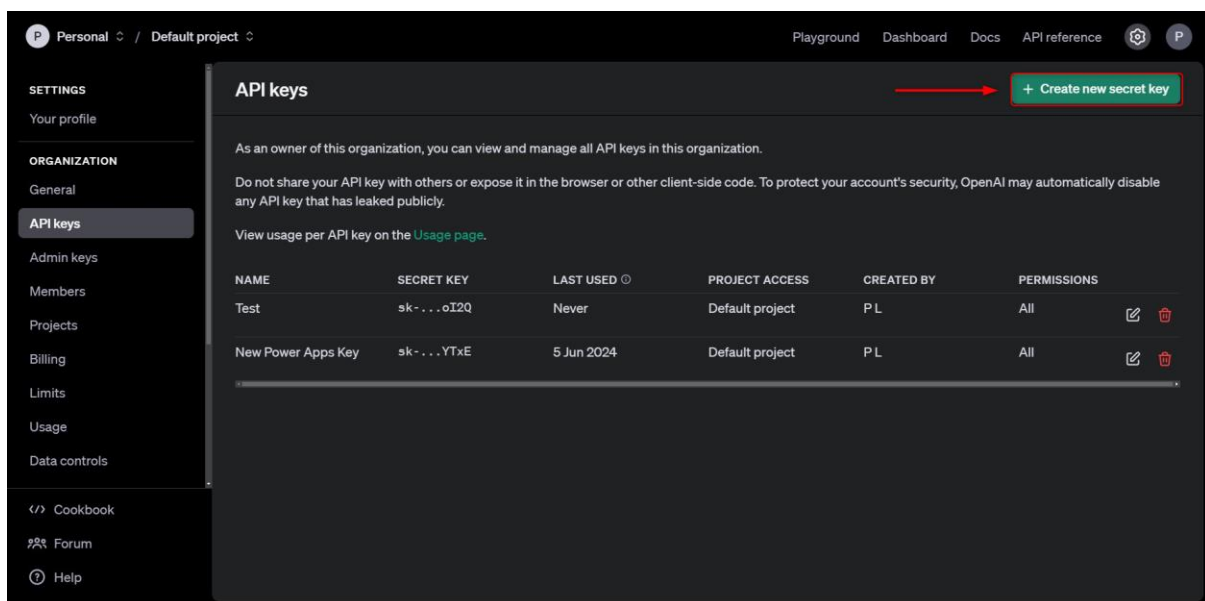
- Windows 10 version 17763.0 or later, alternatively MacOS version 10.13 or later.
- Latest versions of Google Chrome, Microsoft Edge, Mozilla Firefox and or Apple Safari.
- Premium Power Apps license
- An Open AI / ChatGPT Account with an API Key.
- SharePoint Access; Optional, only used for saving responses, has to be removed prior to hand-over if not required
- A Power Platform Environment with Dataverse

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.](#)

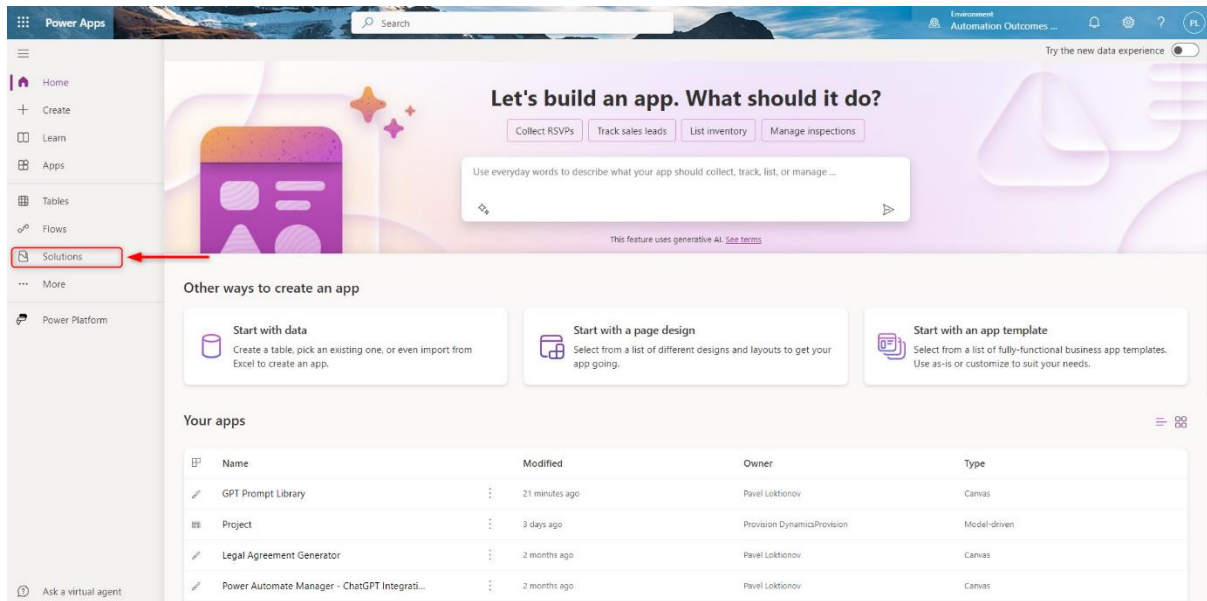
This section goes through how to get and install the app into a power platform environment for business usage.

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

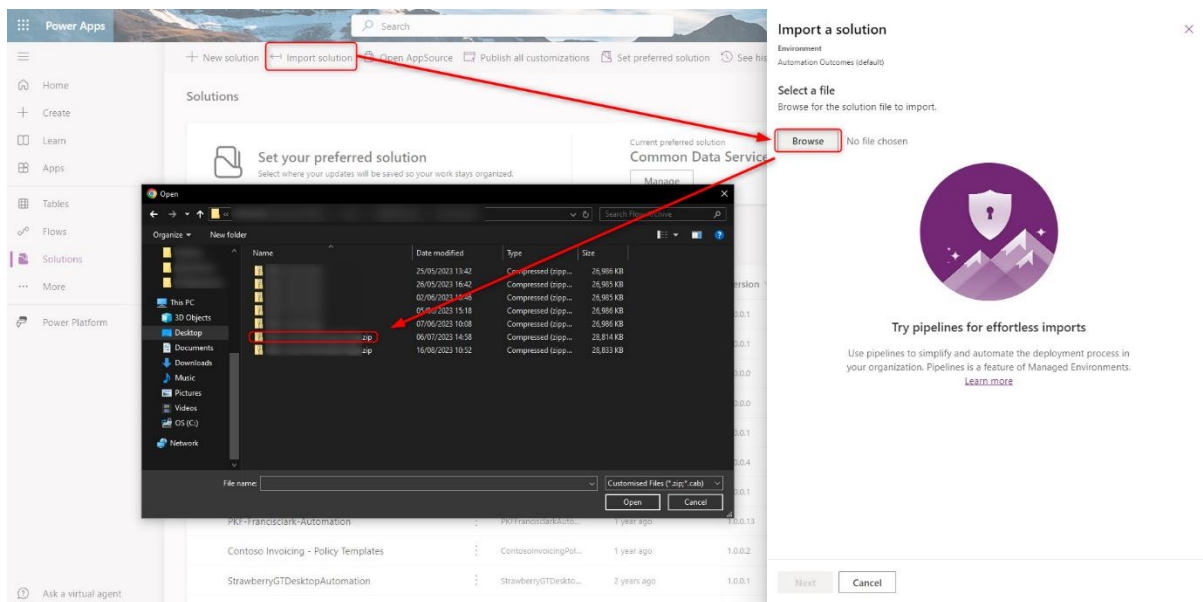
Once saved, proceed with the following steps:

- 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 you will be prompted to enter / select several connection details and then some environmental variables, fill them in as follows:

Connections:

- SharePoint Access, log in with a Microsoft account
- Outlook Access, log in with a Microsoft account.
- Word Access, log in with a Microsoft account.

The screenshot shows the Power Automate interface with the 'Import a solution' dialog open. The dialog is titled 'Import a solution' and has a sub-header 'Environment: Automation Outcomes'. It shows a list of solutions and a list of connections to be established.

Solutions Table:

Display name	Name	Created	Version	Managed
Contextual Help	modyn_ContextualH...	3 years ago	1.0.0.22	Yes
Power Apps Checker	modyn_PowerAppsC...	4 years ago	2.0.0.95	Yes
AO App	A0App	4 years ago	1.0.0.0	No
Power Apps Checker Base	modyn_PowerAppsC...	4 years ago	2.0.0.95	Yes
Contextual Help Base	modyn_ContextualH...	4 years ago	1.0.0.22	Yes
Common Data Services Default Solution	CdsallIT	4 years ago	1.0.0.0	No
Default Solution	Default	4 years ago	1.0	No

Connections Table:

Connection Name	Status
Cr2f0e2_shared_office365_f0f6d4ca	Ready
Cr2f0e2_shared_office365_f0f6d4cae1374bd6b43336cc54886eu9	Ready
Word Online (Business) IPManagementApp-3efeb	Ready
ao_sharedwordonlinebusiness_3efeb	Ready
SharePoint IPManagementApp-adf73	Ready
ao_sharedsharepointonline_adf73	Ready
Cr2f0e2_shared_wordonlinebusiness_2bde124d	Ready
Cr2f0e2_shared_wordonlinebusiness_2bde124dffe4830bc59a0bb6...	Ready
SharePoint GPTBankApp-a153d	Ready
ao_sharedsharepointonline_a153d	Ready

Environmental Variables:

- **SharePoint Library** – Can be safely left alone, its usually “Documents”, however in some instances (depending on SharePoint environment) it can be “Shared Documents” instead, over-write it with that value if SharePoint related actions don’t function as intended.
- **SharePoint Location** – Can be found in the URL when opening SharePoint online more in the description provided (see image or when importing)
- **SharePoint Site Address** – The site address to use, this will be a dropdown that will already be connected to SharePoint, select the appropriate one to use.
- **Documents** – Can be safely left alone, its usually “Documents”
- **Word Template Path** - The path in SharePoint to the word template the App will use to fill in a custom word file with a prompt response

The screenshot shows the Power Automate interface with the 'Import a solution' dialog open. The dialog is titled 'Import a solution' and shows the 'Environment Variables' section. It lists four variables that need to be updated:

- Sharepoint Library**: The value is 'Documents'. The description says 'Usually documents or shared documents.'.
- Sharepoint Location**: The value is an empty text box. The description says 'The sharepoint URL location of the site, usually found by simply going onto the sharepoint site and copying the top url path https://Company/Name.sharepoint.com/sites/Company/Name'.
- SharePoint Site Address**: The value is 'Automation Outcomes'. The description says 'The site address of the sharepoint site to use'.
- Documents**: The value is 'Documents'. The description says 'The file path in sharepoint to the word template file that will be used as a base'.

The 'Word Template Path' variable is also listed but its value is empty. At the bottom of the dialog are 'Import' and 'Cancel' buttons.

Display name	Name	Created	Version	Managed
Contextual Help	msdyn_ContextualH...	3 years ago	1.0.0.22	Yes
Power Apps Checker	msdyn_PowerAppsC...	4 years ago	2.0.0.95	Yes
AO App	AOApp	4 years ago	1.0.0.0	No
Power Apps Checker Base	msdyn_PowerAppsC...	4 years ago	2.0.0.95	Yes
Contextual Help Base	msdyn_ContextualH...	4 years ago	1.0.0.22	Yes
Common Data Services Default Solution	Crdw079	4 years ago	1.0.0.0	No
Default Solution	Default	4 years ago	1.0	No

Installation of App - Automatically

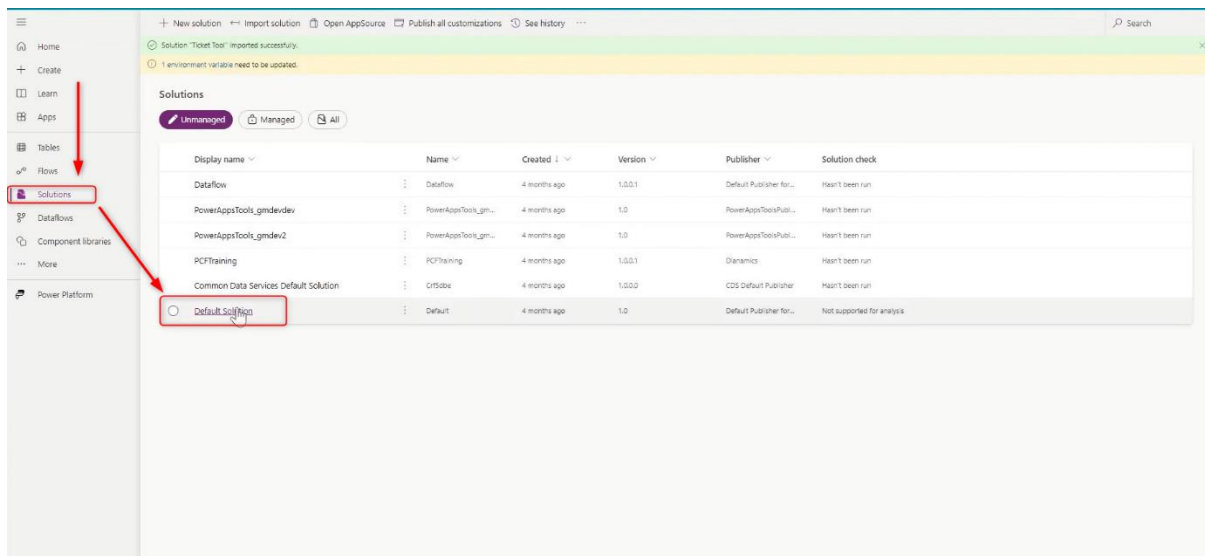
If the solution was installed automatically using package deployer then please make sure to run the “GenerAlt - CLOUD - Set Environmental Variables” flow before using the app if the SharePoint response saving mechanism is required or the environmental variables need to be changed.

Afterwards, please make sure to set or create the appropriate connection references as they may not have been set already. follow this video guide for more information on how:

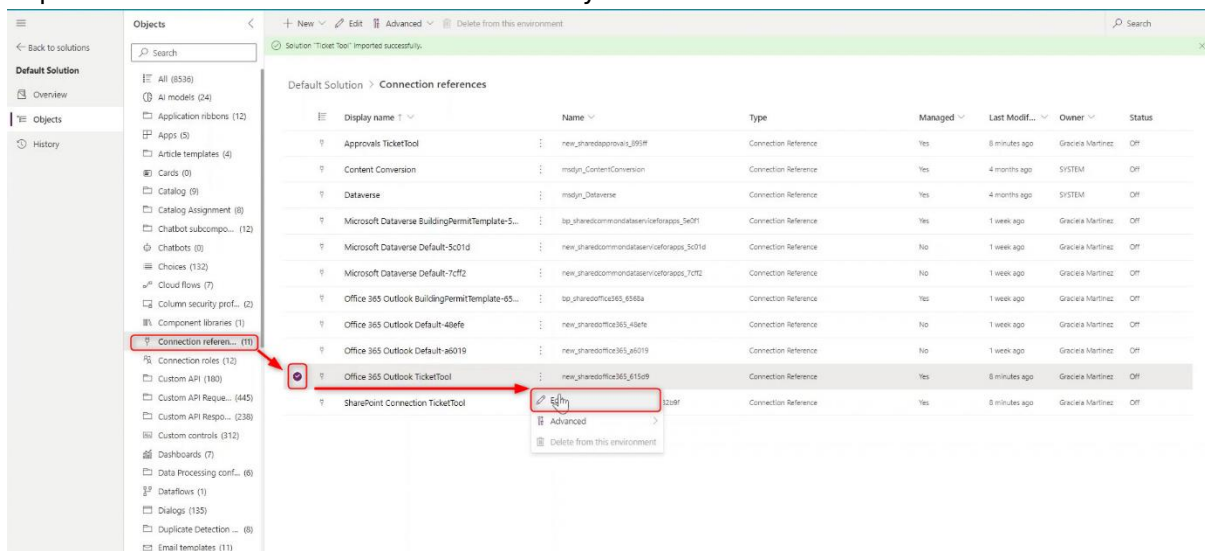
<https://www.youtube.com/watch?v=guNkK2P8crA>

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.

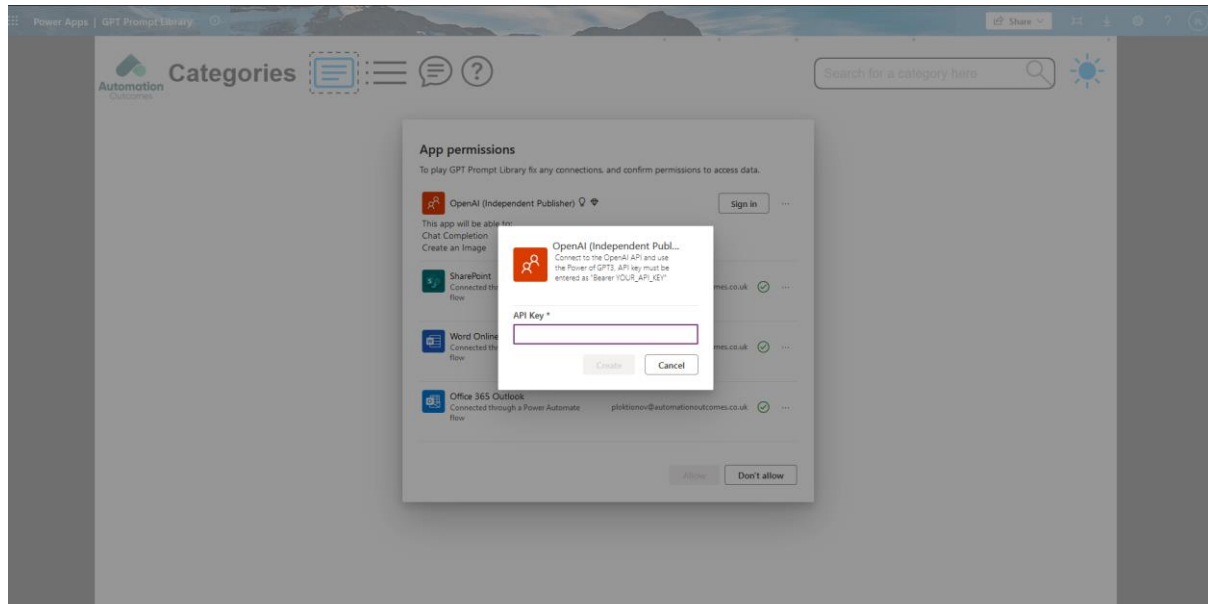


Credit of the screenshots to the Power GI Youtube Channel, <https://www.youtube.com/@PowerGI>

After Import

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, there will be one final field to fill in, this time for Open AI’s API:

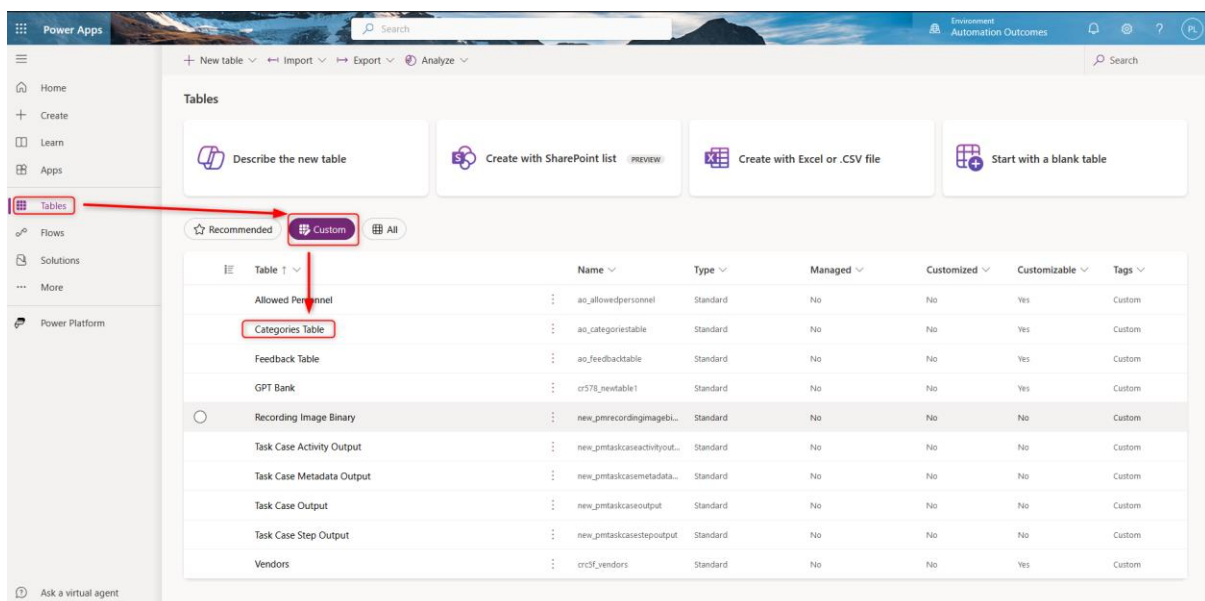
The OpenAI (ChatGPT) API Key, enter it as follows without double quotes: “Bearer PASTE YOUR API KEY HERE” also note that if the installation was automatic, new connections will need to be either allowed if they exist or made if they don’t.



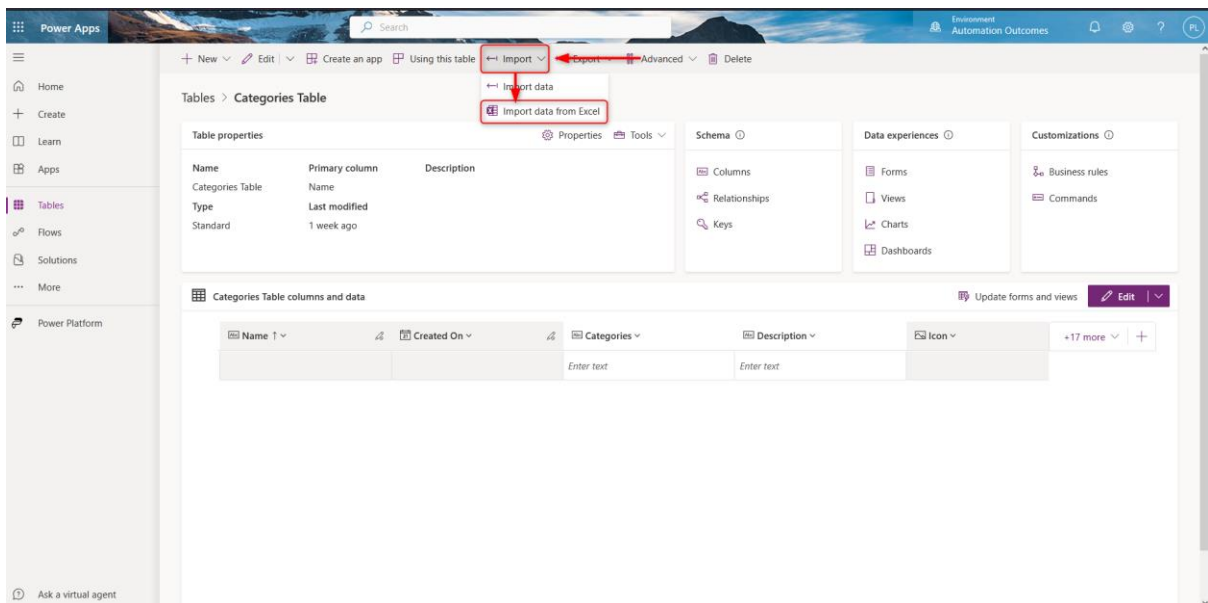
The app is now ready to be used, the app can also start the app from Windows rather than the web using the official Power Apps application that can be found in the Microsoft Store.

Note that the app will not have any data to start off with, the app package provided comes with some sample data that can be imported by following the steps:

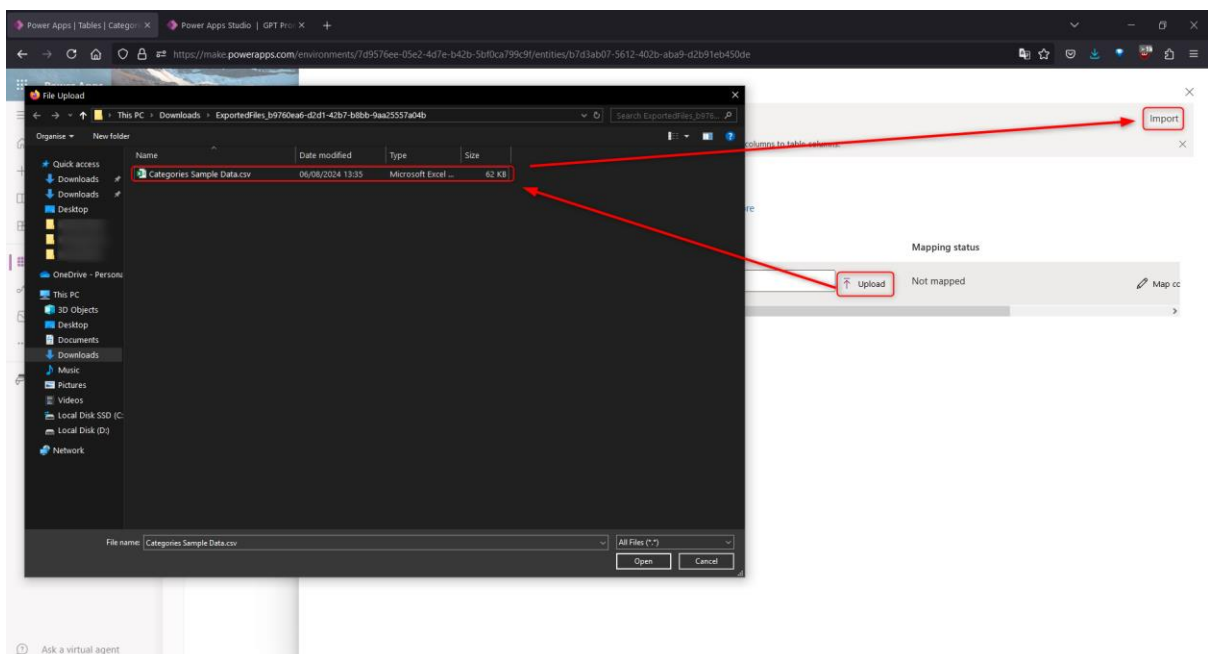
Go into the table section of power apps and select “custom” button, and then select the table that you want to import data into.



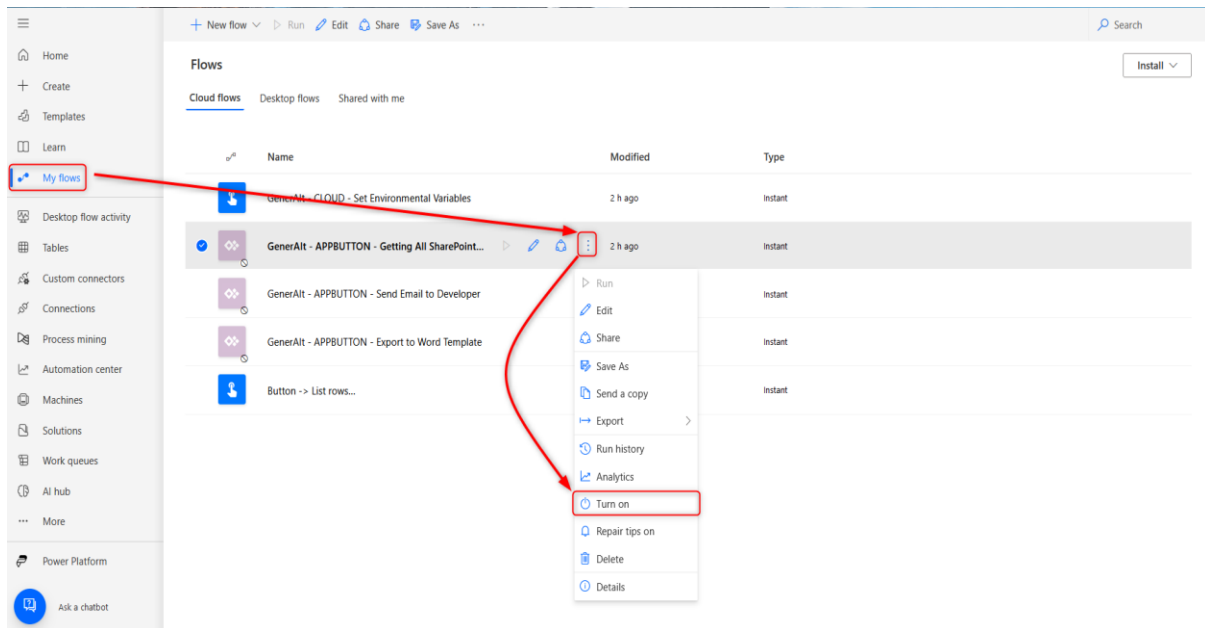
Select the “Import” button in the top ribbon, then select the “Import data from Excel” button from the dropdown



A popup menu will appear that prompts the user to upload a file, select the “Upload” button and then select the excel table data that needs to be imported, note that each excel file is named according to the Dataverse table it belongs to. The mapping status field will now change to “Uploading” let it finish mapping before continuing. Once done, finally select the “Import” button in the top right corner of the menu, and once that has finished successfully, close the pop-up and refresh the page, the data will now show up in the table. (If you get an error, try repeating the process, and if that doesn’t work, contact us on support@automationoutcomes.co.uk)



Finally, one last action to enact, go to <https://make.powerautomate.com/>, select “My flows” and select the three dots next to any grayed out flows and select “Turn ON” as flows have a tendency to not turn on automatically when being imported for security reasons.

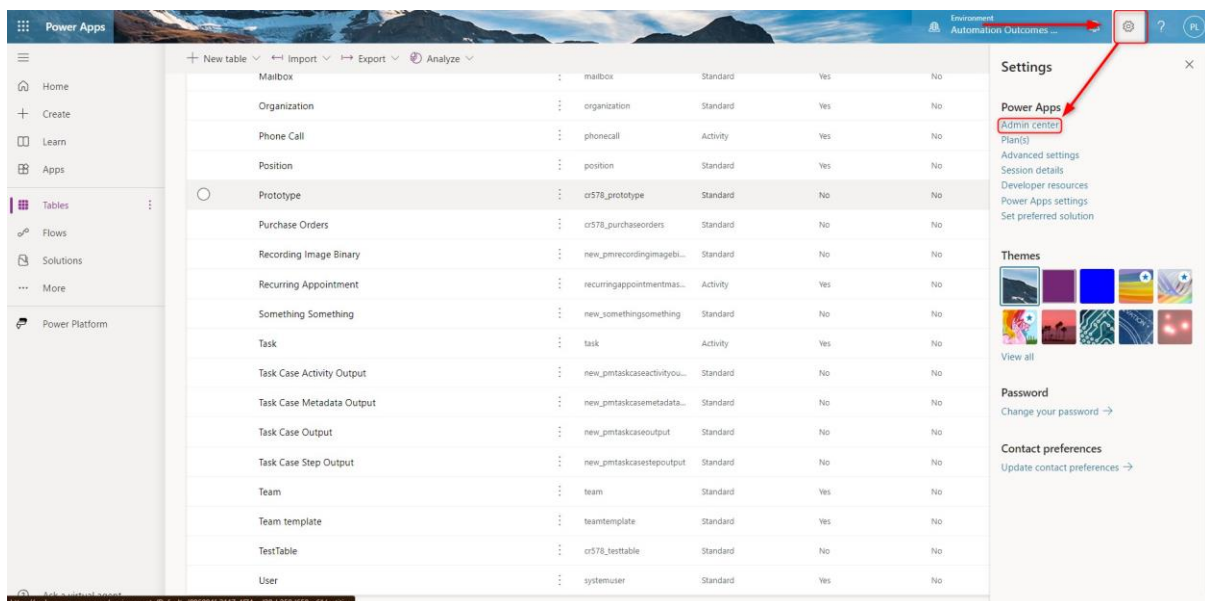


Creating an Admin Role

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. However, if the system admin is confident that no other admin other than themselves should be able to add other admins and or users, ignore this step and skip to “Now open the newly imported solution.” part of the text

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

Navigate to Power Platform Admin Centre:

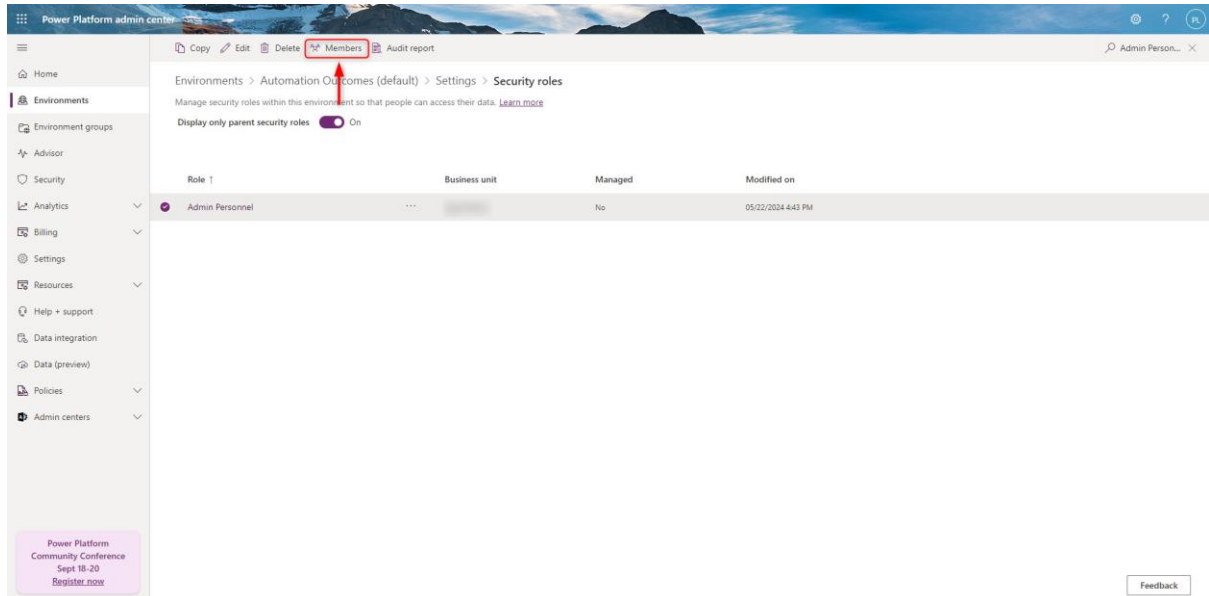


Select “Environments” in the left-hand menu and select the environment the solution was imported into.

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

Search for “GenerAlt – Security Role - Admin Personnel” 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

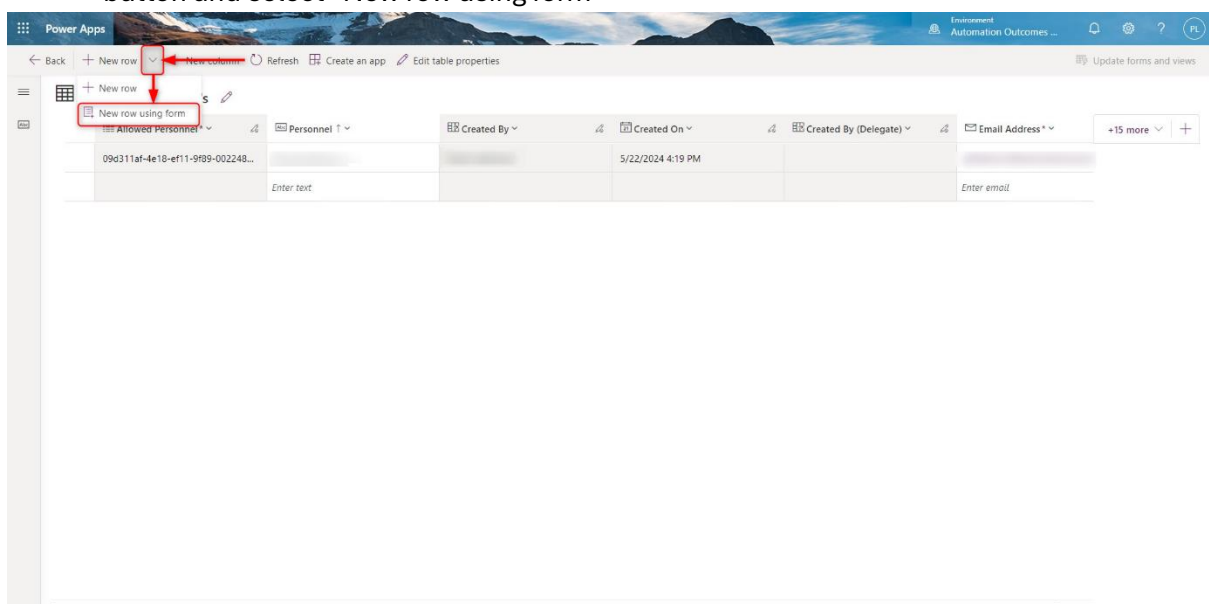


Add the user to be admin to the role as needed.

Now open the newly imported solution.

Once opened do the following:

- Select the “Allowed Personnel” 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:
 - Personnel – Full Name of Personnel to be added
 - 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.
 - Global Admin – Set this to Yes, this will make the user a global admin.

The user should now be a global admin of the app and be able to add or remove roles and edit, create or delete prompts, categories etc.