## **PointFire Summarization**

### Introduction

In this document you find the information on how you can install and configure the PointFire Summarization solution.

Introduction Prerequisites Creating the Azure services Install the PointFire Summarization package Configuration of PointFire Summarization Using the summary component in your own templates

#### Prerequisites

To get started, you need to have the following prerequisites in place:

- PnP Search Web Parts installed on your environment. More information: <u>https://microsoft-search.github.io/pnp-modern-search/</u>
- Azure Account which has access to create a new Azure OpenAI service

#### **Creating the Azure services**

To make use of the PointFire Summarization, you will need to create a new Azure OpenAI service. Follow the next steps to configure it:

- Go to the Azure Portal: <u>https://portal.azure.com/</u>
- Create a new resource
- Search for OpenAl
- Select Azure OpenAl
- Fill in the required fields for the service and wait until it is created
- Once the service is created, open it in the Azure Portal

- Click on the go to Azure Al Foundry portal
- Click on the model catalog and deploy the following models:
  - gpt-4o-mini
  - gpt-35-turbo-instruct
- Once both of the models have been deployed, you can go to the **deployments** view, and click on one of them
- On the model overview, you can see the **target URI** and **key**. You will need to keep these settings for the configuration of the web part

Details Metrics Risks & Safety	iii Delete	
Deployment info		Endpoint
Name gpt-35-turbo-instruct Deployment type Standard Created by	Provisioning state Succeeded Created on 2024-09-23T09.47:56.9484997Z Modified on Sep 25, 2024 11:17 AM	Target URI         https://       openai azure com/openai/deployments/gpt-35-turbo-instruct/         Key
Modified by Rate limit (Tokens per minute) 240,000	Version update policy Once the current version expires Rate limit (Requests per minute) 1,440	Monitoring & safety Content filter DefaultV2
Model name gpt-35-turbo-instruct Life cycle status GenerallyAvailable	Model version 0914 Date created Sep 14, 2023 2:00 AM	Useful links for application development Code sample repository C Tutorial C
Date updated Sep 14, 2023 2:00 AM	Model retirement date Apr 1, 2025 2:00 AM	

#### Install the PointFire Summarization package

Follow the next steps to install the PointFire Summarization package:

- Go to your SharePoint App Catalog
- Add the pointfire-document-summarization.sppkg package to the catalog
- Allow it to be deployed to all site collections
- Once this step is completed, you can configure the solution

#### **Configuration of PointFire Summarization**

Go to the SharePoint site where you want to have the page where you can search for documents.

Follow the next steps for the whole configuration:

- Create a new page or edit an existing one
- Add a PnP Search Box web part on the page
- Add a PnP Search Results web part on the page
- Edit the Search Results web part
- First, go to the last configuration page where you can load the extensibility library
- Click on the configure button under the Extensibility libraries to load section
- Configure the library as follows:
  - Default extensibility library can be turned off if you don't use it
  - Add a new record with:
    - Name: PointFire Summarization
    - GUID: 05a5f5a9-f2dc-4fe9-b58e-1429d6ec615e
    - Enabled: on
  - Click on add and save

Configure extensibility libraries to load at startup.				×
Add/Remove your custom extensibility library IDs here. You can specify a display name and loaded here.	decide if the library should be loaded or not at startup. Only custo	m data sources, layouts, web compone	ents and Handlebars he	lpers will be
Name/Purpose	Manifest GUID	Enabled/Disabled *		
1 V Default extensibility library	dc4f961b-dbe0-44b4-982d-5776bf99d015	) Off		×
PointFire Summarization	05a5f5a9-f2dc-4fe9-b58e-1429d6ec615e	On On		+
			Add and save	Cancel

- Go back to the first page where you can select the SharePoint Search data source
- Configure the SharePoint Search settings as follows:
  - Query Text: {?{searchTerms} (isdocument:true)}
- Configure the Paging options as follows:
  - Number of items per page: 5

All other settings can be left as default.

- Click on **next** to go to the template configuration
- Choose the Summary template (it can be that this is not yet available. If that is the case, save the page, refresh the page, edit the page, and open the web part settings.)
- Under the Layout options section, you should now see the following settings:
  - Open file in browser/desktop application
  - Wait for summary
  - Highlight keywords
  - AI URL
  - Al Key
  - Keywords AI model (default is: gpt-4o-mini)
  - Summary AI model (default is: gpt-35-turbo-16k)
  - Summary length (defines the length of the summary)
- Provide the AI URL in the following format: https://<service>.openai.azure.com
- Provide the AI Key
- Click on **next** to configure the search box connection
- To connect the search box web part, follow the next steps

- Enable use input query text
- Select dynamic value
- In the connect to source dropdown, select the PnP Search Box web part
- In the **PnP Search Box's properties** dropdown, select **Search query**

PnP - Search Results	×
Available connections	^
Use input query text On	0
<ul> <li>Static value</li> </ul>	
Oynamic value	
Connect to source	
PnP - Search Box	~
PnP - Search Box's properties	
Search query	$\sim$
Use a default value	

• Save and publish the page. You are now done configuring the page.

When you now search for documents, you will receive document summaries for each results that gets returned.



The summaries are created based on the extracted text from the document relevant to the search query.

# Using the summary component in your own templates

When you have the PointFire Summarization library installed and configured as explained in the previous steps, you are able to make use of the pf-summarization-text web component in your custom Handlebars templates.

The component requires the following configuration:

```
<pf-summarization-text
data-index="{{@index}}"
data-picture-thumbnail-url="{{item.PictureThumbnailURL}}"
data-path="{{item.Path}}"
data-site-url="{{#if item.SPSiteUrl}}{{item.SPSiteUrl}}{{item.SPSiteURL}
data-web-url="{{#if item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{item.SPWebUrl}}{{ite
```

```
data-list-id="{{item.ListId}}"
 data-list-item-id="{{item.ListItemID}}"
 data-identity-list-item-id="{{item.ldentityListItemId}}"
 data-query="{{@root.inputQueryText}}"
 data-total-items-count="{{@root.data.totalltemsCount}}"
 data-sp-summary="{{slot item @root.slots.Summary}}"
 data-ai-url="https://<service-name>.openai.azure.com"
 data-ai-key="<service-key>"
 data-prompt=""
 data-wait-for-summary="true"
 data-model-keywords="gpt-4o-mini"
 data-model-summary="gpt-35-turbo-16k"
 data-summary-length="70"
 data-allow-pdf-conversion="true"
 data-allowed-file-extensions=""
 data-spinner-gap="{{ @root.theme.spacing.s1 }}"
 data-spinner-color="{{ @root.theme.palette.neutralPrimary }}"
 data-spinner-font-size="{{ @root.theme.fonts.small.fontSize }}"
 data-spinner-svg-size="{{ @root.theme.spacing.l1 }}"
 data-spinner-svg-color="{{ @root.theme.palette.themePrimary }}"
></pf-summarization-text>
```

The web component will only return a paragraph with the summary.