



Chat Assistant

Outline of Installation Steps & Configurations

Azure Configurations:

1. [Create Azure OpenAI](#)
2. In [Azure AI Studio](#) Create a new deployment using the `text-davinci-003` model. If you already have one note the name and use that. Note: this model can only have one deployment at a time. To create a new deployment for this model, you will have to delete the existing deployment first. Be sure to enter into the “[Completions](#)” area and look for the text link called (“**View code**”) from this popup window you can get your FULL “**Endpoint**” as well as the “**Key**” needed in the next steps.

Configure Custom Connector:

1. [Download](#) the YAML file to make a custom connector.
 - a. Configure via text editor:
 - i. Line 10 (Your **Instance** Name)
 - ii. Line 17 (Your **Deployment** Name)
 - iii. Line 138 (Add your KEY)
 - iv. Lines 144 & 146

Example:

<https://<<InstanceName>>.openai.azure.com/openai/deployments/<<DeploymentName>>/completions?api-version=2022-12-01>

2. Make the Custom Connector in the Power Platform Environment
 - a. Name it EXACTLY as ... **AzureOpenAI**
 - b. Test the connector to ensure it is working and returns a 200, any errors resolve your configuration
 - c. Share the Connection made during test to the entire organization or specific users

Install and Deploy the Solution File:

1. [Deploy the solution](#) in your Environment on the Power Platform.
2. In Solution Explorer choose Apps from the list of objects, select the application named “Chat Assistant - Azure OAI” and choose [Details](#) from the top menu or from the inline vertical ellipsis on the selected row. From the Details window copy the [Web link](#). Close the details window.



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Configure the Application:

1. Environment Variables.
 - a. envAdminList → enter into the “*Current Value*” of the environment variable, either a single email or a list of comma separated email addresses as they exist in AzureAD/O365/M365. Be sure to use the PRIMARY email address of an account or that user may not have administrative access as the emails do not match.
 - b. envAppURL → in make.powerapps.com where the app is installed go to the canvas app’s “*Details*” and copy out the “*Web link*”, then past this as the “*Current Value*” in the Editing of the environment variable.
2. Optionally you can change the colors of the app. These settings are located in the canvas app’s “OnStart” property.
 - a. The variable “ThemeColors” controls the color of the entire application from a central location. Use a website like <https://mycolor.space> to help find an array of complementary color matches based on your primary company single color.
 - b. Administrators and the menu system. There is a collection of users that control admin access to the menu and the additional admin screens. The collection is at the very top called “colAdmins” and you can add as many admins to this collection as needed
3. DeepLinking – there is a parameter configured in the StartScreen property, called “SS” for Start Screen. Adding to the applications URL the following URL parameter, **&SS=1** will take one to the Dashboard on app start. Adding, **&SS=2** takes the user to the feedback screen on app start, anything else sends then to the default normal screen called GENERAL.

Configure Cloud Flows:

1. Going back to the Solution Explorer, select Cloud Flows.
 - a. Edit each flow where you see the outlook send mail action and update your email addresses where you want notifications to go.
 - b. You do not need to use these flows as they are optional. The action are triggered based on the data so there is no app dependency

Configure Roles:

1. Custom Role in the [Power Platform Admin Center](#)
 - a. Select the environment where you installed the solution
 - b. The Solution should have installed a custom role called **ChatAssistant**.
 - i. This role is based off the Basic User Role and has the configuration to allow access to the 3 custom Tables used by the application.
 - c. Assign users in this environment to this **ChatAssistant** role so the application works as expected.