

**Power Framework AI Assistant 2024A Release Note**

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**Document Date:30/10/2024**

**1. Introduction**

This document describes the features to be implemented to Power Framework AI Assistant as a single change or multiple changes to be released in the same deployment.

**2. Release Version**

The following list contains the release versions for this deployment:

*NB: These are the version numbers at time of release and subsequent patches may have been applied (please see section 8).*

<b>Product</b>	<b>Version</b>
Server-Side Software	NA
Power App Solution	1.0.4

\* Interim solution version numbers in which the listed features were initially developed are outlined per feature in section 5.

**3. Release Assessment**

The following list contains an overview of the release assessment:

<b>Item</b>	<b>Description</b>
RTM date	30/10/2024
High level features included	<ul style="list-style-type: none"> <li>• AI Assistant, activated via button on a form’s main command bar, can be deployed within the following apps:               <ul style="list-style-type: none"> <li>○ Power Framework PPM App</li> <li>○ Power Framework Enterprise Risk App</li> </ul> </li> <li>• Configurable buttons, invoking specific AI assisted actions when pressed (context sensitive depending on the records it is applied to). For example:               <ul style="list-style-type: none"> <li>○ Creation of project risks</li> <li>○ Creation of risk assessment tasks</li> <li>○ Populate text field narratives e.g.                   <ul style="list-style-type: none"> <li>▪ Project return on investment</li> <li>▪ Risk mitigation plan</li> </ul> </li> <li>○ General PPM/Risk assessment guidance</li> </ul> </li> <li>• Dynamically retrieve data from a form and use to ground the AI prompt.</li> <li>• AI prompt configuration – set instructions that set context, enforce organisational policies or templates or request information to be returned in a specific format</li> <li>• View generated content and ask for refinements</li> <li>• Save AI generated content to specific fields and create records.</li> </ul>
Installation date	Contact your customer success manager to schedule the implementation of this feature (Customer.Success@Programframework.com)
Downtime required for deployment	None
Rollback Plan	Fix forward

Change to be deployed by	To be agreed in partnership with Program Framework / Internal Client IT
Impacted stakeholders	
End user impact	<p>Users – dependant on security roles Additional UI pop up if user chooses to interact with AI Assistant.</p> <p>Minor UI change including addition of new AI Assistant button in top ribbon if user does not interact with this feature.</p> <p>End user and administrator training will be required for use of this feature.</p>
System requirement	<p>Deploy Azure OpenAI Resources including a compatible GPT modelling component. Current recommended modelling deployment is GPT 4o-Mini.</p> <p>Further information is included within <a href="#">Power Framework AI Assistant Integration - Azure Deployment Pre-Reqs v1.1 Oct 2024.pdf</a></p>

#### 4. Maintenance Fixes and Improvements

The following list contains fixes that are included in this release:

Internal Ref	Details
None	None

## 5. New Features -

The following list contains features that are included in this release:

Feature	Initial Solution Version No.	Internal Ref	Details	Prerequisites	Commercials	Knowledge Article - Documentation link
<b>AI Assistant – Open/Close</b>	1.0.0	417	<p><i>'As a Project Manager I want to launch the AI assistant within a project so that I do not have to context switch to use the assistant.'</i></p> <ol style="list-style-type: none"> <li>1. I can see an "AI Assistant" button in the project form's ribbon.</li> <li>2. On selecting the button, the AI assistant UI is presented in a pane.</li> <li>3. I am not taken away from the project form.               <ol style="list-style-type: none"> <li>a. But it is OK for the AI assistant to overlay/block the project form.</li> </ol> </li> <li>4. I can close the AI assistant pane at any time.</li> </ol>	Azure AI Deployment	<p>Implementation cost: £2300</p> <p>£4,800 per annum Program Framework subscription</p>	<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16250883497244-Invoking-the-AI-Assistant#h_01J9PXD7RRZD011KS9TGS4AAZK">https://servicedesk.powerframework.com/hc/en-gb/articles/16250883497244-Invoking-the-AI-Assistant#h_01J9PXD7RRZD011KS9TGS4AAZK</a>
<b>AI Assistant – Context Assistance</b>	1.0.0	511	<p><i>'As a user I want the AI assistant to offer the AI assisted operations appropriate to the state of the record so that I can quickly determine what the assistant can do for me.'</i></p> <p>When the AI assistant is presented:</p> <ol style="list-style-type: none"> <li>1. I can see a list of selectable operations(/topics)</li> </ol>			<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16250883497244-Invoking-the-AI-Assistant#h_01J9PYXZ5MEZNOQEH2D2BZ1XY7">https://servicedesk.powerframework.com/hc/en-gb/articles/16250883497244-Invoking-the-AI-Assistant#h_01J9PYXZ5MEZNOQEH2D2BZ1XY7</a>

			<p>applicable to the current record i.e. where pre-conditions are met*.</p> <ol style="list-style-type: none"> <li>2. I have the option to show (&amp; hide) operations which would be applicable to the current record if it were in a different state i.e. where pre-conditions are not met*.</li> <li>3. When operation pre-conditions are not met*, I have the ability to view those pre-conditions which are not met.</li> <li>4. If I select an operation whose pre-conditions are not met*, I am presented with a list of the pre-conditions which are not met.</li> <li>5. If I select an operation whose pre-conditions are not met* I cannot invoke that operation.</li> </ol> <p><i>*Operation specific pre-conditions are specified in operation specific user stories.</i></p>			
<b>AI Assistant – Output Refinement</b>	1.0.0	447	<i>'As a Project Manager I want to provide refinement statements to an AI assistant so that I can refine the output without moving back to the input parameters.'</i>			<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R8ZHB0FSZK14B8WWWMNHHVE">https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R8ZHB0FSZK14B8WWWMNHHVE</a>

			<ol style="list-style-type: none"> <li>1. Whilst viewing generated output, I can enter one or more refinement statements.</li> <li>2. When I have entered one or more new refinement statements, I have an option to apply them e.g. "Go".</li> <li>3. Upon applying refinement statements I can see the AI assistant's output changes accordingly.</li> <li>4. I can enter further refinement statements (repeating 1 - 3).</li> </ol>		
<b>AI Assistant – PPM App – Narratives</b>	1.0.0		<p>Assist in creating narrative text for:</p> <ul style="list-style-type: none"> <li>• Project Objectives</li> <li>• Project Return On Investment</li> <li>• PPM Risk Mitigation Plan</li> </ul>		<p><a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16320185949084-AI-Assistant-PPM#h_01J9RQDD3DNC90T34N9QHSZQQ6">https://servicedesk.powerframework.com/hc/en-gb/articles/16320185949084-AI-Assistant-PPM#h_01J9RQDD3DNC90T34N9QHSZQQ6</a></p> <p><a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16320185949084-AI-Assistant-PPM#01J9TTYGMRVCD8B0SEYXCRYF3">https://servicedesk.powerframework.com/hc/en-gb/articles/16320185949084-AI-Assistant-PPM#01J9TTYGMRVCD8B0SEYXCRYF3</a></p>
<b>AI Assistant – PPM App – Risk Register</b>	1.0.0	511 (Original)	<p>Create Risk Register Pre-Conditions</p> <p>When the AI assistant is presented from an existing project record:</p> <ol style="list-style-type: none"> <li>1. I can see an option to "Create Risk Register".</li> <li>2. When "Create Risk Register" is selected and any of the following conditions are true, the associated message is displayed:</li> </ol>		<p><a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R73R1JKSWFOJQPEXPB8A4T">https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R73R1JKSWFOJQPEXPB8A4T</a></p>

			<ul style="list-style-type: none"> <li>b. Project description is not populated: "Please record a project description."</li> <li>c. Objectives are not populated: "Please record project objectives."</li> </ul> <p><i>NOTE: Actual text is configurable so may vary from that stated.</i></p>		
	1.0.0	513	<p>Create Risk Register Output</p> <p><i>'As a Project Manager I want to see an AI generated risk register before it is committed so that I can ensure the creation of an appropriate risk register.'</i></p> <p>When "Create Risk Register" is invoked:</p> <ul style="list-style-type: none"> <li>1. I can see an output section.</li> <li>2. Within the output section I can see a risk register in a tabular format containing: <ul style="list-style-type: none"> <li>a. Name</li> <li>b. Description</li> <li>c. Category <ul style="list-style-type: none"> <li>i. Category options must match those available in the PPM Category choices.</li> </ul> </li> </ul> </li> </ul>		<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16304376209436-Generating-Multiple-Related-Records-with-AI-Assistance">https://servicedesk.powerframework.com/hc/en-gb/articles/16304376209436-Generating-Multiple-Related-Records-with-AI-Assistance</a>

			<ol style="list-style-type: none"> <li>3. I can update any element.</li> <li>4. I have an option to commit the risk register.</li> <li>5. On selecting yes/commit: <ol style="list-style-type: none"> <li>a. The risks are created in PPM.</li> <li>b. The AI assistant is closed.</li> <li>c. The project form Risk tab is shown.</li> </ol> </li> <li>6. At any time whilst in the output section, I can return to the operation selection &amp; input section with one click. <ol style="list-style-type: none"> <li>a. Where I can edit the parameters &amp; constraints and resubmit.</li> </ol> </li> <li>7. The refinement feature from <a href="#">#447</a> is available here.</li> </ol>		
<b>AI Assistant – Risk App – Narratives</b>	1.0.0	552 & 553	<p>Assist in creating narrative text for:</p> <ul style="list-style-type: none"> <li>• Risk Mitigation Plan</li> <li>• Risk Assessment Guidance</li> </ul>		<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16307048655388-AI-Assistant-Risk">https://servicedesk.powerframework.com/hc/en-gb/articles/16307048655388-AI-Assistant-Risk</a>
<b>AI Assistant – Risk App – Risk Mitigation Tasks</b>	1.0.0	550	<p>Create Mitigation Tasks Pre-Conditions</p> <p>When the AI assistant is presented from an existing Risk record:</p> <ol style="list-style-type: none"> <li>2. I can see an option to "Create Mitigation Tasks".</li> <li>3. When "Create Mitigation Tasks" is selected and any of</li> </ol>		<a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R73R1JKSWFOJQPEXPB8A4T">https://servicedesk.powerframework.com/hc/en-gb/articles/16300202380572-Using-the-AI-Assistant-Step-by-Step-Example#h_01J9R73R1JKSWFOJQPEXPB8A4T</a>

			<p>the following conditions are true, the associated message is displayed:</p> <ul style="list-style-type: none"> <li>c. Risk Title is not populated: "Please record a risk title."</li> <li>d. Risk Summary is not populated: "Please record a risk summary."</li> <li>e. Detailed Description is not populated: "Please record a detailed description."</li> <li>d. Stage is not 'Monitor': "This operation can only be applied when the risk is at Monitor stage."</li> </ul> <p><i>NOTE: Actual text is configurable so may vary from that stated.</i></p>			
		551	<p>Create Mitigation Tasks Output When "Create Mitigation Tasks" is invoked:</p> <ul style="list-style-type: none"> <li>1. I can see an output section.</li> <li>2. Within the output section I can see mitigation tasks in a tabular format containing: <ul style="list-style-type: none"> <li>a. Subject</li> <li>b. Description</li> </ul> </li> <li>3. I can update any element.</li> <li>4. I have an option to commit the mitigation tasks.</li> <li>5. On selecting yes/commit: <ul style="list-style-type: none"> <li>a. The mitigation tasks are created.</li> </ul> </li> </ul>			<p><a href="https://servicedesk.powerframework.com/hc/en-gb/articles/16304376209436-Generating-Multiple-Related-Records-with-AI-Assistance">https://servicedesk.powerframework.com/hc/en-gb/articles/16304376209436-Generating-Multiple-Related-Records-with-AI-Assistance</a></p>



			<ul style="list-style-type: none"><li>i. Task Type is always Mitigation.</li><li>b. The AI assistant is closed.</li><li>c. The Tasks tab is shown.</li></ul> <p>6. At anytime whilst in the output section, I can return to the operation selection &amp; input section with one click.</p> <ul style="list-style-type: none"><li>a. Where I can edit the parameters &amp; constraints and resubmit.</li></ul>			
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## 6. Dropped Features

The following list contains features that are no longer available in this release:

<b>Internal Ref</b>	<b>Details</b>	<b>Documentation Update</b>
None	None	None

## 7. Known Issues

The following list contains known issues and workarounds associated with this release:

<b>Known Issue</b>	<b>Details</b>
None	None

## 8. Post Release Updates to Solution Version Number

<b>Product</b>	<b>Original Version</b>	<b>New Version</b>	<b>Change Detail</b>
None	None	None	None