High level of steps for installation of Assist Azure Managed Application from Azure Marketplace

Pre-Install – <u>All prerequisites for installation from the Azure Marketplace. Detailed instructions provided</u>.

1. <u>Client</u> An AAD account that will be used for the installation needs to be identified. The account will need to have owner/install Rights on the subscription they will be installing under.
   NOTE: If the installation is conducted via a private offer, the client needs to provide the subscription ID so a private offer can be published that will only be seen from the identified subscription.
2. <u>Client</u> Though not required prior to installation, at some point there will be the need to create a Cognative Services Language instance and project. This will be fully in the client's control and can be in any resource group of their choosing. Or this can be done post installation by the Kyvoo team. If the installation is created by the client, it is important that the following two items are completed:
   a. Allow the installation to create a new delegate account.
   b. Identify an existing delegate account.
   The delegate account will be used by the Cognitive service to read documents/URLs. Client can limit this accounts access as another way to control what documents/URLs can, or can not, be accessed by Cognitive services..
3. <u>Client</u> Identify one AAD user account that will be assigned intial admin rights on the new installation durring the installation process.
4. <u>Client</u> Creation and authorization of 2 app registrations. This can either be done manually or via a provided PowerShell script. (CreateAADApps.ps1)
5. <u>Client</u> Manually authorize the AMC App Registration for Read Access to the AAD. This will be used for retrieving AAD user accounts for role assignment in AMC.

Upon completion of the above, the installation from the Azure Market Place can proceed.

Azure Marketplace Installation – <u>A new Managed Resource Group will be created along with a number of resources that the application will then be installed to.</u>

6. <u>Client</u> will need to login to the azure marketplace with **an account that has either the "Billing account owner" or "Billing Account Contributor" role** for the subscription they will be installing the application under.
7. <u>Client</u> Search for "Assist" inside of Azure Marketplace and start the installation.
   a. Choose the plan that corresponds to their support preference
      i. **Full Support -** Less expensive and faster. Internal Kyvoo controls used to limit Kyvoo support personnel access to the Managed Resource Group.

       ii.   **Just In Time Support -** More expensive and can result in delayed response. Client approval required prior to limit Kyvoo support personnel access to the Managed Resource Group. Approval of access is limited to a client chosen maximum duration.

   b.   Follow the provided documentation to complete the installation

Update resources parameters – There are some resource parameters that cannot be set until after a resource is created. In this step a custom PowerShell script is created and shared with the client so required parameters can be set on the newly created resources.
       NOTE: These parameters need to be properly set before the application can be installed.

8. Kyvoo Support shares a secure cloud location containing files that have been customized for the clients resources.
   a. Custom AAD update PowerShell script (Required changes prior to install)
   b. (2) Teams applications files (AMC and Assist)

9. Client Run the AAD update PowerShell script (UpdateAad.ps1)
10. Client Notify Kyvoo Support that that the post installation script has been run.

Application Install – The application is installed to resources in the Managed Resource Group.

11. Kyvoo Support verifies all required installation properties have been received.
12. Kyvoo Support requests (if necessary) access to the Managed Resource Group and verifies connectivity.
13. Kyvoo Support pushes client specific application to the resources in the clients Managed Resource Group.

(Client portion of install)
14. Client publishes the "Assist" and "AMC" Teams application packages (JSONs) that were previously shared.
    a. Usually performed via Teams Admin console (https://learn.microsoft.com/en-us/microsoftteams/upload-custom-apps)
15. Client verifies ability to connect to the system via "AMC".
16. Client and Kyvoo confirm system functionality and proper configuration as needed
    a. Power BI - configure system to point to desired dashboard
    b. Service Now - identify and configure for ticket detail push using existing SN account
    c. ChatGPT - configure account

Prior to Rollout – Steps to verify the system is fully functional on day one.

17. Client identifies initial topic catagories to be supported and their respective owners.
18. Client/Kyvoo Catagory owners contacted to introduce the system.
19. Client Catagory owners identify their initial SMEs.
20. Client/Kyvoo Category owners and SMEs identify initial documents to seed QnA pair creation.
21. Client/Kyvoo review/update seed QnA pairs

> *Goal is to populate the database with an initial set of customized QnA pairs that will answer 80% of likely questions for each catagory.*

22. Review/edit QnA pairs created by AI
23. Compare AI generated pairs to "common" pairs for each category. Adding/editing as needed
24. <u>Client</u> Identify pilot users.
25. <u>Client/Kyvoo</u> Craft/approve communication plan and schedule for pilot and end user rollout.
26. <u>Client/Kyvoo</u> review existing SLAs and create corollary/matching SLAs and rules in Assist.
27. <u>Client/Kyvoo</u> create SLA rules, actions, schedules.
28. <u>Client/Kyvoo</u> Training
     a. Admin training - 2 hours
     b. Manager Training - 2 Hours
     c. SME Training - 1/2 hour
29. <u>Client/Kyvoo</u> Soft rollout to SME team and pilot users.

Rollout – <u>Introduction of Assist to the end users.</u>

30. <u>Client/Kyvoo</u> Promote rollout using approved communication plan.
31. <u>Client</u> Teams application distribution through client chosen method.
32. <u>Kyvoo Support</u> quick response support addressing any unforeseen issues.
33. <u>Kyvoo Support</u> Monitoring of adoption.
34. <u>Client/Kyvoo</u> Ongoing application promotion as needed.
35. <u>Client/Kyvoo</u> Expand catagories covered as client desires.