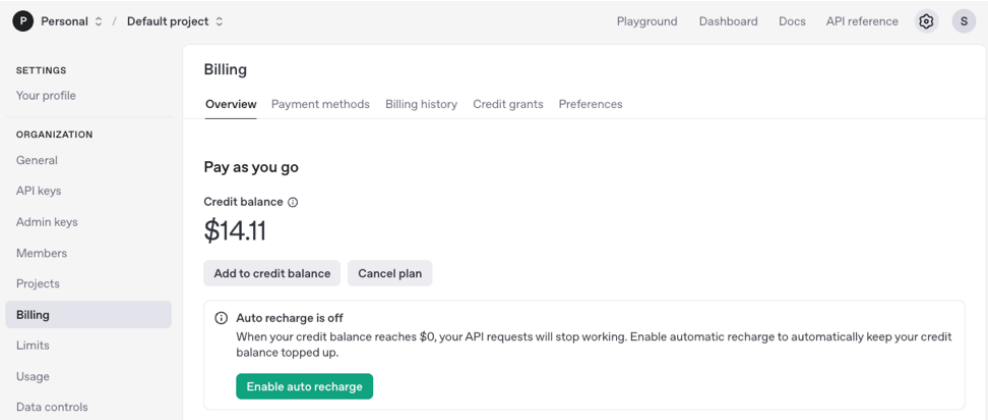
Instructions for CAITLibot installation:

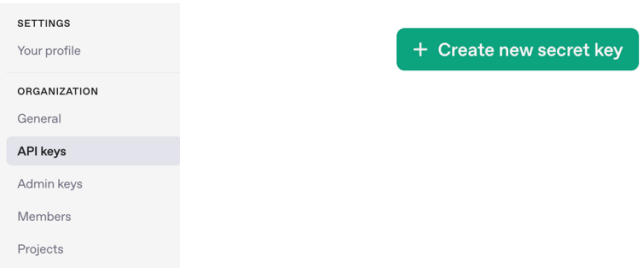
1. **OpenAI Developer Account**
   https://platform.openai.com/
   Required for all deployment types, local and remote

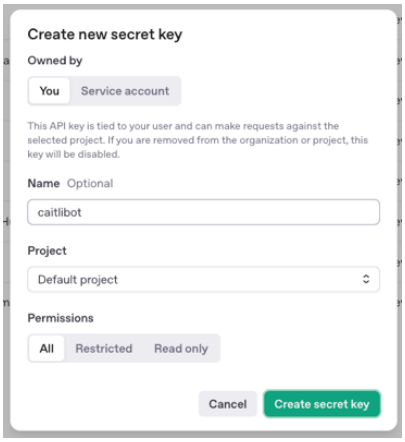
   Follow the instructions to create a new account.

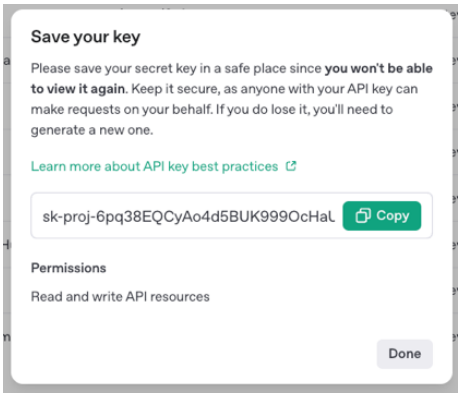
   Top up your account with some funds, £10 would be fine to get started.
   https://platform.openai.com/settings/organization/billing/overview



   Create a new API key for CAITLibot. The key name is just for your reference.







   Copy and paste the key somewhere safe and secure (e.g. Google Keep)

2. **Node installation**
   https://nodejs.org/
   Required to run local copy, e.g. on your own computer

   Specifically, you need Node version 22 LTS (Long Term Support).

   Once node has been installed, open a terminal window and type **`node --version`**

   The output should look something like `v22.15.1`

   Node also comes with a package manager called npm (node package manager).
   This is used to install the libraries and dependencies for the source code.
   Check this is working be typing **`npm --version`**

   The output should look something like `11.4.1`

3. **The CAITLibot source code!**

   Extract the zip file Steve sent you to somewhere easy to find, e.g. your desktop

   Open a terminal window and navigate to the extracted folder, e.g.
   `cd Desktop/caitlibot`

   List the files to check they're all there by typing **`ls`**
   You should see the following:

```
LICENSE      assets       package.json routes       utils
README.md    models       public       server.js    views
```

   Install all the libraries CAITLibot requires by typing **`npm install`**
   This will take a couple of minutes to run.

   You can now run CAITLibot! Type **`npm start`**
   You should see the following:

```
> caitlibot@1.0.0 start
> node server.js
Cannot establish OpenAI API Key.
✓ Server started on port 3000
```

   ← *Don't worry, we'll set this up next!*

   Press **[control]** + **[c]** on your keyboard to stop CAITLibot.

   Once CAITLibot has been run, you'll see a new folder on your desktop called **data**. Inside this folder will be a file called **caitlibot.sqlite**, this is the database for your local copy of CAITLibot.

   You need to create a file called **openai_api_key.txt** in which you need to put your OpenAI API key as created earlier.

   On MacOS, if you still have the OpenAI API key in your clipboard and you haven't closed the terminal window yet, you can create the file on the command line by typing this…

   `pbpaste > ../data/openai_api_key.txt`
   (The **`../`** bit means go up one level first in order to find the data folder)

If you are in a new terminal window, type this instead...

```
pbpaste > Desktop/data/openai_api_key.txt
```

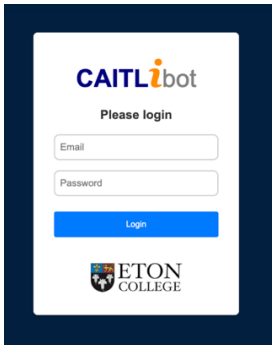
Either way, you can check the file is now the data folder on your Desktop.

We can now run CAITLibot for a second time with `npm start`

If you are in a new terminal window, type `cd Desktop/caitlibot` first

```
> caitlibot@1.0.0 start
> node server.js
✓ Server started on port 3000
```

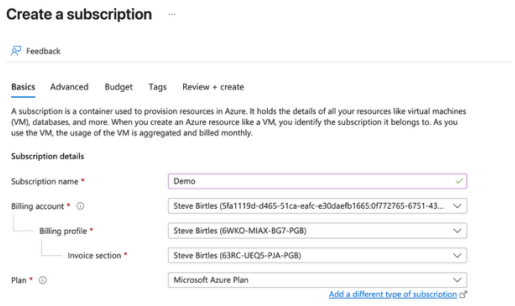
Open a web browser and navigate to `localhost:3000`
The default username and password are **admin@caitlibot.com** and **changeme**

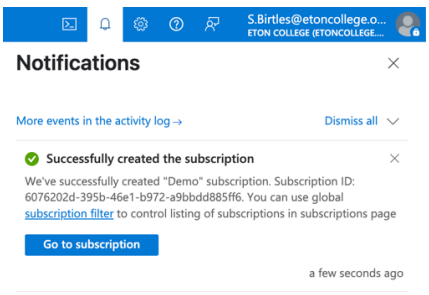


Please note, anything you do with CAITLibot on your local copy won't be copied to the cloud. The cloud will get a fresh database. This means it's safe to play around with the local copy – there's no risk of breaking anything.

4. **Microsoft Azure account**
   http://azure.microsoft.com/
   Recommended to run a remote copy in the cloud

   Once you've setup an Azure account, you need to create a 'subscription'.
   Please give this a sensible name. In my demo here, I've just called it **Demo**.
   It can take a minute for this to activate, check your notifications...





5. **Azure CLI software**
   https://learn.microsoft.com/en-us/cli/azure/install-azure-cli?view=azure-cli-latest
   Required to deploy a copy of CAITLibot from your computer to Azure.

Follow the install instructions on the above website for your computer.

On MacOS, you need Homebrew to install the Azure CLI software
https://brew.sh/

One the Azure CLI software is installed, open a terminal and type `az login`

A web browser will open to establish your login credentials, and then it will ask you to pick the subscription to use. You should just be able to press [enter] to auto-pick the subscription you created earlier.

We're now ready to upload the CAITLibot source code from your computer to Azure!
In terminal, navigate once again to the caitlibot source code folder
`cd Desktop/caitlibot` (as earlier, type this in a new terminal window)

Type the following to publish the code to Azure (**this is all one line!**):

```
az webapp up --name caitlibot-demo --sku F1 --runtime "NODE:22-lts"
 --plan caitlibot-demo-plan --resource-group caitlibot-demo-group
 --location uksouth
```

Change `caitlibot-demo` to be your *globally unique* choice of name, e.g. '**myschool-caitlibot**'

This magic incantation does a lot!

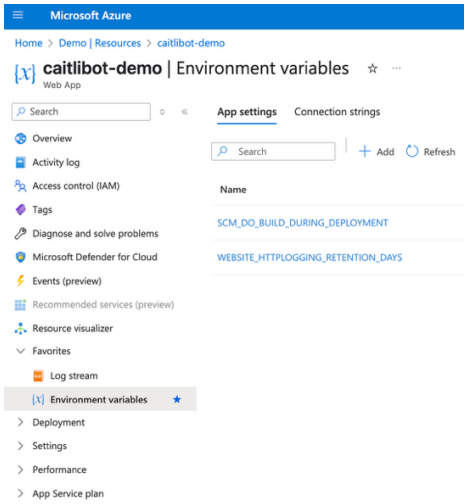
- **name** is the globally unique name for your web app
- **sku** deploys this initially as a free app (we can upgrade it later!)
- **runtime** sets the underlaying code system to be Node 22
- **plan** is the name of the linux virtual container we are hosting the app on
- **resource-group** needs to be set (despite the fact we only have one app, still needs a group)
- **location** is UK South to keep your data protection officer happy ☺

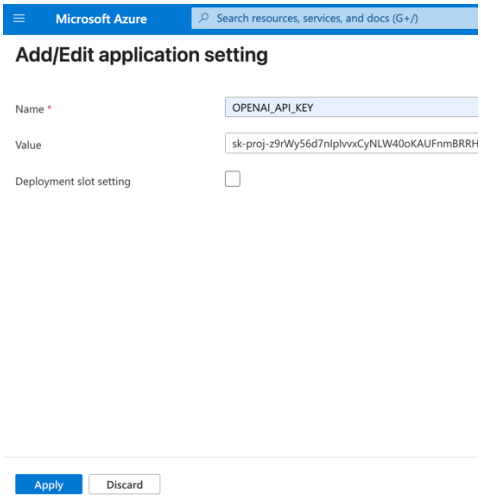
The end result is that our code is published to https://caitlibot-demo.azurewebsites.net

Once deployment has finished (will take a few minutes) try to visit your web address. You'll see the following, since will need set your OpenAI API key in Azure (the text file was just for your local computer).

Technically, your instance of CAITLibot is now live, congratulations! it just needs configuring.

6. **Set your OpenAI API key in Azure**
   From the Azure homepage, click on your app service in the list, navigate to 'Environment variables', click 'Add'.





The environment variable's name needs to be **OPENAI_API_KEY** and you need to copy & paste your API key into the Value box. Click 'Apply' to save. Click 'Apply' again and confirm you want to save the changes.

You should now be able to go back to the website and login!

As earlier, the default username and password are **admin@caitlibot.com** and **changeme**

Now, please move on to the next document...

'Instructions for CAITLibot configuration and customisation'