Strategy AI Documentation

# How to Run the Application After Installation and your Files are Loaded

1. open two command prompts in the “<root path to folder>\frontend” directory

2. In the first terminal, start the backend by running: “npm run dev-backend”

3. In the second terminal, start the frontend by running: “npm run dev”

4. In the second terminal, you will see a link that you can open in your browser: “http://localhost:5173/”

5. Opening the link will open the application

# Before Running the Application

You have to decide on the files you want to use for analysis.

**<path to application folder>\backend\strategy\_ai\available\_data\visible\_files**

The files in the above folder are the files the AI will have access to when executing tasks.

## To add you company files

put them in the folder: **backend\strategy\_ai\available\_data\visible\_files\client\_files**

## To add links to websites

list them, one link on each line, in the text file: **backend\strategy\_ai\available\_data\visible\_files\weblinks.txt**

## To delete your company files

remove the undesired files from the folder: **backend\strategy\_ai\available\_data\visible\_files\client\_files**

## To remove saved output files (results from tasks)

These are the files that you would have saved from previously running the application.

Delete files from this folder: **backend\strategy\_ai\available\_data\visible\_files\ai\_files**

# How to Use the Application

1. you will be able to see the application in your web browser
2. To refresh the files being shown in the left side of the screen, click the refresh button
3. A screen shot of a computer

   Description automatically generated
4. you can run a task by selecting one from the drop down menu, and then click the start but
5. A screenshot of a computer

   Description automatically generated
6. You will see the results be generated below
7. A screenshot of a computer

   Description automatically generated
8. Once the results are ready, the save button at the bottom will be enabled
9. A screenshot of a computer

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10. If you are happy with the results, you can click the **Save** button to save a copy of the results (as shown on screen) to the ai\_files folder. pressing the refresh button will show that file in the UI.
11. These saved files will become available to the AI when running tasks upon a refresh of the backend (by killing and restarting the backend terminal)
    1. The feature will be added in where the backend does not have to be restarted to make use of the newly saved task results

# How to Install the Application

Requirements:

* [link to github repository](https://github.com/hendrixgg/strategy-ai)
* Node.js and npm (gives you the option to install python along with it)
* OpenAI api key

1. Ensure that you have Node.js and NPM installed so that you can build the project
   1. check if it is installed by opening a cmd terminal and running: “node -v” or “npm -v”
      1. on your keyboard: “Windows Button” > type “cmd” > press “Enter”
      2. a terminal window will open
      3. in the terminal, type: “node -v” then press Enter
      4. in the terminal, type: “node -v” then press Enter
      5. if node and npm were installed already, you will see a version number come up below: **you can** **skip to step 2 to download the repository**
      6. if there was no version number, but some error message: **continue to step 1.b**
   2. if not installed go to: <https://nodejs.org/en/download>
   3. download the installer for your operating system by clicking either mac or windows
   4. A screenshot of a computer

      Description automatically generated
   5. run the installer (say yes to everything and check that box at the end where it mentions Chocolatey)
   6. when the command prompt opens up, press enter and proceed with the installation
2. now to get the repository, you have two options, either:
   1. without git:
      1. download the zip file from the website: <https://github.com/hendrixgg/strategy-ai>
      2. A screenshot of a computer

         Description automatically generated
      3. extract the compressed folder
   2. use git to clone the repository
   3. copy the path to the folder where you downloaded the repository, you will need it for next steps
3. open up command prompt in the frontend directory (using WINDOWS)
   1. press “Windows Button” > type “cmd” > press “Enter”
4. To install the UI, run:

cd <path to extracted folder>\\frontend && npm install

1. To install the backend:
   1. install the dependencies (this may take a few minutes) run:

cd <path to extracted folder>\\backend && python -m venv env && env\\Scripts\\activate && pip install -r requirements.txt

* 1. now you need to input your OpenAI api key
     1. open the backend folder
     2. create a file titled “.env”
     3. in the file put: OPENAI\_API\_KEY = “your api key here”
     4. paste your actual OpenAI api key within the quotes
     5. save the file

**The installation is now complete!**