



GPT Innovation Team Training – Module 7

Module Title: Plug It In & Keep It Running: Connecting GPT to Real Workflows

Module Overview

This module is for those TM's behind the curtain... The ones who make sure the GPT agent doesn't just *exist* but actually works inside the tools and systems our teams use every day.

You'll learn how to embed, secure, and maintain GPT across platforms like SharePoint, Excel, dashboards, and even future AI agents. Your job is to ensure the agent is accessible, reliable, and aligned with our real operational needs.

Learning Objectives

By the end of this module, you will be able to:

1. Embed GPT into user-friendly locations like SharePoint and dashboards
 2. Set up secure access and define user permissions
 3. Coordinate with IT on uptime, updates, and support
 4. Test integrations with WMS, LMS, or SharePoint libraries
 5. Monitor performance, manage issues, and support future scalability
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Lesson Content

Part 1: What Integration Really Means

“Integration is how we move GPT from an idea to a tool people actually use.”

You are connecting GPT to:

- Where the work gets done (SharePoint, dashboards, Power Apps, etc.)
- Where the data lives (LMS, WMS, SOP libraries)
- Where the people already go (homepages, handhelds, screens)

Integration = frictionless access + trustworthy performance.

Part 2: Common Integration Points

<u>Tool / System</u>	<u>Integration Purpose</u>
SharePoint	GPT chatbot + quick prompt launcher inside training or SOP portal
Power BI	Dashboard-enhanced analysis + prompt-based insight requests
WMS / LMS	Pull content directly into training modules or workflow triggers
Tablets/Kiosks	Team-facing GPT access points in breakrooms or training bays
Power Apps or Flow	Trigger GPT workflows when forms or events occur

You don't have to integrate with everything. We'll start where it creates *real value*.

Part 3: Security, Permissions & Stability

Work with IT to ensure:

- Access roles are clearly defined (Admin, Leader, Team Member)
- Agent data is separated from confidential or PII systems
- Only sandbox-safe content is available to the model
- GPT usage logs are auditable if needed
- Uptime and alerts are monitored (set up a simple health check)

Always run access testing with sample users before going live.

Part 4: Embedding GPT in SharePoint (Example)

Add your GPT chatbot to a SharePoint training portal.

Steps:

1. Go to your sandbox SharePoint site
2. Add a new section → Embed web part
3. Paste GPT or iframe code
4. Customize layout and permissions
5. Test access with 3 different roles (Admin, Ops Manager, Supervisor)

Add buttons like “Ask GPT,” “Generate Huddle Script,” or “Find a SOP” for easier user flow.

Part 5: Monitoring & Maintaining the System

You are the first line of tech support. Keep it simple:

<u>Task</u>	<u>Frequency</u>
Test access from multiple devices	Weekly
Check GPT load speed / performance	Weekly
Review new features or updates	Monthly
Meet with IT or sandbox team to review usage, issues, or needs	Monthly
Gather frontline feedback about access or bugs	Ongoing

If something breaks, don't just patch it. Document the fix for the knowledge base.

Practice Activity

Task:

Embed the GPT chatbot (or prompt launcher) into a sandbox SharePoint page or demo portal.

Then:

1. Test the integration from a supervisor login and a frontline login
 2. Confirm that permissions, layout, and responsiveness work
 3. Take a screenshot and upload it to the "Tech Demos" folder with notes on:
 - What you integrated
 - Any access or formatting issues
 - Suggested next integration idea
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Quiz (Knowledge Check – 6 Questions)

1. What is the main goal of GPT integration?
 - a. Create a backup server
 - b. Make GPT accessible where work happens 
 - c. Protect all company data
 - d. Limit usage to IT only
2. Which of these is a valid integration location?
 - a. Whiteboard
 - b. SharePoint site 
 - c. Paper SOPs
 - d. Office breakroom sign
3. What should you test before going live?
 - a. The weather forecast
 - b. HR policies

- c. User access and load speed ☒
 - d. Your email signature
4. What is a simple way to embed GPT in SharePoint?
- a. Use a sticky note
 - b. Email the agent
 - c. Use the “Embed” web part ☒
 - d. Print the prompt
5. Who should you coordinate with for security and uptime?
- a. HR
 - b. Safety Team
 - c. IT ☒
 - d. Only yourself
6. What should you do monthly?
- a. Guess what needs fixing
 - b. Monitor new GPT features and meet with sandbox team ☒
 - c. Turn the system off for testing
 - d. Rebuild the SharePoint site
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Reflection Prompt

“Where do you think GPT access should live to make it part of our daily flow and what’s one way to improve how fast or easy it is to use?”

Submit using the Sandbox Reflection Form.

Completion Badge



Badge Name: "GPT Integration Leader – Level 1"

Requirements:

- Pass quiz
- Submit an integration test screenshot or summary
- Complete reflection