# Getting Started with EPM

You are just a few clicks away from using OfficeExpert EPM. Please make sure to follow the instructions below.

## Step 1: Customer Input

In order to initiate the on-boarding process for your company, we require the following data from you:

- The **tenant ID**(s) of the endpoints you wish to monitor in the following format: "XXXXX-XXX-XXXXX-XXXXX".
  These should also include the associated **name**(s) for each tenant, e.g. "ACME production".

- The **domain**(s) which should get access to the reporting platform, e.g. for admin@acme.com, "acme.com" should be used.

- Tell us to which panagenda SaaS Region you want to be onboarded (EU, US, ...).

Please send this information to sales@panagenda.com.

## Step 2: Azure Apps

Before using OfficeExpert EPM, you must add three Azure AD applications and give admin consent.

## **Windows Agent**

The first application required is Windows Agent. To add it, please click the following URL:

https://login.microsoftonline.com/organizations/v2.0/adminconsent?client_id=261f3858-8cfb-4e86-bbd1-e4e036ca4c3b&state=12345&redirect_uri=https%3A%2F%2Fportal.azure.com&scope=User.Read%20Mail.ReadBasic%20TeamsApp.Read%20Chat.Read%20ChannelMessage.Read.All%20Sites.Read.All%20Files.Read.All%20Files.Read%20Presence.Read.All%20TeamsActivity.Read%20https%3A%2F%2Foutlook.office365.com%2FEAS.AccessAsUser.All%20https%3A%2F%2Foutlook.office365.com%2FEWS.AccessAsUser.All%20https%3A%2F%2Foutlook.office365.com%2FUser.Read%20https%3A%2F%2Foutlook.office365.com%2FMail.ReadBasic%20

Tick the "**Consent on behalf of your organization**" checkbox to give admin consent:
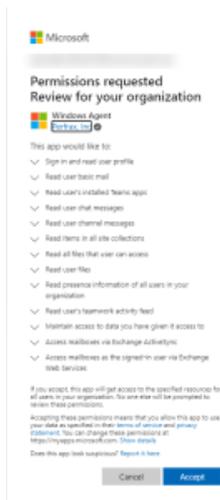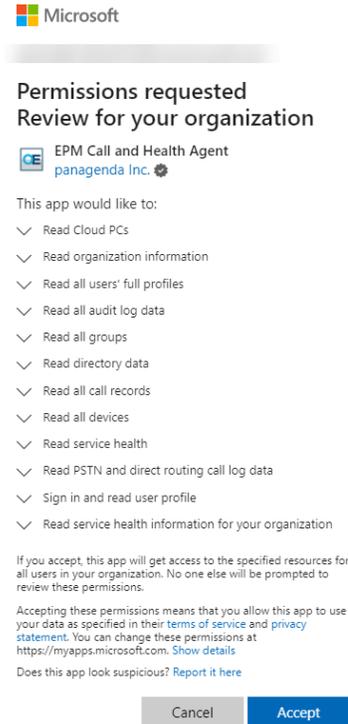
## EPM Call and Health Agent

This application retrieves call record data from your tenant using the official Call Records API.

To add this second application, please access the following URL:

https://login.microsoftonline.com/organizations/v2.0/adminconsent?client_id=95f3747d-3b3b-4f13-bf5d-55dc12f9a87a&scope=https://graph.microsoft.com/.default&redirect_uri=https%3A%2F%2Fportal.azure.com%2F%23blade%2FMicrosoft_AAD_IAM%2FStartboardApplicationsMenuBlade%2FAllApps%2FmenuId%2F&state=nzpkRaqfFCre8v6DWmrWKgu3UMPxG7Fp

The following dialog is displayed:



Click on **Accept** to add the EPM Call and Health Agent to your Azure.


## EPM Portal

This application is required to allow your admins access to the panagenda EPM Portal.

As soon as the panagenda internal provisioning process is complete, we will send you an email with the URL to your unique OfficeExpert EPM Portal. With a global administrator account, accept the request below  "on behalf of your organization" by ticking the corresponding checkbox:
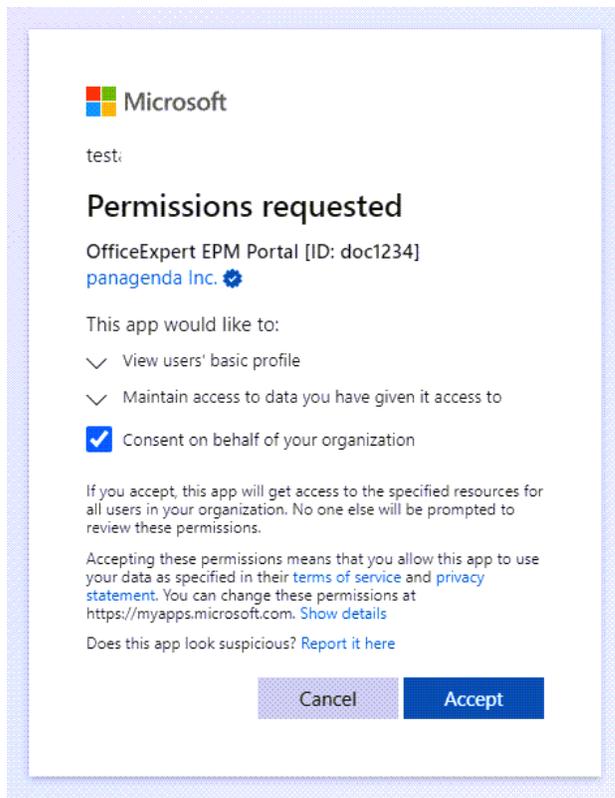
The EPM Portal application will appear as **Enterprise App** in your tenant. You can adjust the user accesses accordingly in your Azure portal, see EPM Portal - Restrict Access for further details.

**Note**: if you try to access the Portal App as a normal user the first time (instead of a global admin) you likely get the following message:
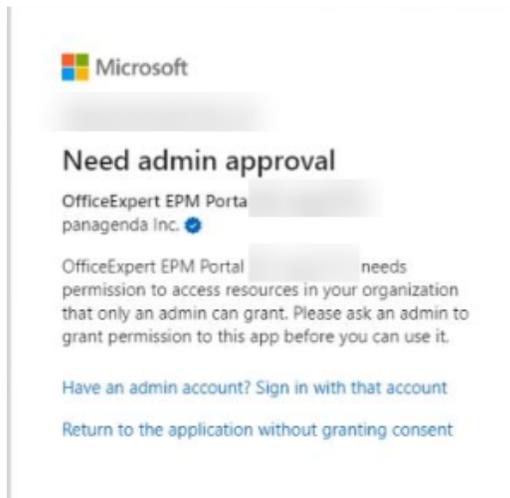


This message is displayed due to security restrictions you have in place in your Azure tenant, in which users are not allowed to register any applications.

## Step 3: OfficeExpert EPM Client Roll-Out

While the SaaS on-boarding process is in progress, you can already begin rolling out the OfficeExpert EPM client in your organization. To do so, proceed as follows:

1. Please make sure you follow the following Client Requirements: Client Requirements for OfficeExpert EPM
2. The download link to the panagenda OfficeExpert EPM Client will be directly send to you by our team.
3. The Installation Guide of the Client can be downloaded from here: Install Guide
4. Integrate and deploy the Installer with Intune, SCCM, or any other Software Deployment Tool.

> ⚠️ **Please make sure the Windows Agent Azure AD App is available and installed (Step 2 from above) before you install and deploy the EPM Client to all devices!**

> ⚠️ **What are the names of the processes running on the computers after the installation?**
> The OfficeExpert EPM client consist of two different parts
>
> a) OfficeExpert EPM app *(Background => PerfraxAgent.exe; Foreground => PerfraxAgent.Exec.Net.exe)*
>
> b) OfficeExpert EPM startup app *(Background only => Panagenda.AgentStartupNetConsole.exe)*

**Optional:** Start the client application in case you don't have any SSO in place

> ℹ️ If you use SSO, the application will log you in immediately. If not, you will see a login dialog in which you need to log in manually. Once you are logged in,  you will see the homepage of the client application. The client has now been registered and you can close the application.

**Now, everything is ready to proactively monitor and analyze your end points with OfficeExpert EPM. For further information, please have a look at the EPM articles in the panagenda knowledge base.**