

# Agent Installation Guide

Step-by-step installation and deployment guide

## 1. Prerequisites

Before installing the SummitView Agent, ensure you have:

- Windows Server 2016+ or Windows 10/11 (64-bit)
- A SummitView account (sign up at [summitview.app](https://summitview.app))
- .NET 6.0 Runtime or later installed
- A user account with Power BI Admin role in your Microsoft 365 tenant
- Outbound HTTPS (443) access to [summitview.app](https://summitview.app) and Power BI API endpoints
- Administrator rights on the target machine (for service installation)

## 2. Network Requirements

Ensure the following outbound connections are allowed (no inbound ports required):

Destination	Port	Purpose
<a href="https://summitview.app">summitview.app</a>	443	SummitView cloud API
*.analysis.windows.net	443	Power BI REST APIs
<a href="https://login.microsoftonline.com">login.microsoftonline.com</a>	443	Azure AD authentication
*.pbidedicated.windows.net	443	XMLA (PPU/Fabric only)

## 3. Download

Download the latest agent from your SummitView dashboard:

- Log in to [summitview.app](https://summitview.app)
- Navigate to Settings > Agents, or follow the onboarding wizard
- Click 'Download Agent' to get the latest installer ZIP
- Extract the ZIP to a permanent location (e.g., C:\Program Files\SummitView\)

## 4. Installation Steps

### Step 1: Extract and Run

- Extract the downloaded ZIP file to your chosen installation directory
- Run `SummitView.Agent.exe` as Administrator

## Step 2: Authenticate with Microsoft

- A browser window will open for Microsoft SSO sign-in
- Sign in with a user who has Power BI Admin role
- The agent will register automatically with your SummitView organization
- Accept the consent prompt for the SummitView Agent Azure AD app

## Step 3: Grant Admin Consent (if required)

- Some Power BI APIs require Azure AD admin consent for the SummitView Agent app
- An Azure AD administrator can grant consent in the Azure portal:

Azure Portal > Enterprise Applications > SummitView Agent > Permissions > Grant admin consent

- Required for: Usage Analytics (Tenant.Read.All), Capacity Metrics (Capacity.Read.All)
- The agent will automatically pick up newly granted permissions — no restart needed

## Step 4: Verify

- Return to your SummitView dashboard
- Navigate to Settings > Agents
- The agent should appear with 'Online' status within 60 seconds
- Check the Permissions tab to verify which features are active

## 5. Running as a Windows Service

For production deployments, install the agent as a Windows service:

- Open an elevated Command Prompt or PowerShell
- Run: `sc create SummitViewAgent binPath="C:\Path\To\SummitView.Agent.exe" start=auto`
- Run: `sc start SummitViewAgent`
- The service will start automatically on system boot
- Configure the service account to run as a domain user if needed for proxy access

## 6. Enterprise Deployment (SCCM/Intune)

- MSI installer available for enterprise deployment tools
- Silent install: `msiexec /i SummitViewAgent.msi /quiet`
- Pre-configure OrgId and AgentId via appsettings.json before deployment
- The agent configuration file is located at: appsettings.json in the install directory

## 7. Configuration

The agent configuration file (appsettings.json) supports the following settings:

- ApiBaseUrl: SummitView cloud endpoint (default: <https://summitview.app>)
- AgentId: Unique agent identifier (auto-generated on first run)
- OrgId: Organization identifier (auto-assigned on registration)
- AzureAd.ClientId: Azure AD app registration client ID for the agent
- AzureAd.TenantId: Set to 'common' for multi-tenant, or your specific tenant ID

## 8. Troubleshooting

### **Agent shows Offline in dashboard:**

- Verify the agent process/service is running
- Check outbound HTTPS to [summitview.app](https://summitview.app) is allowed
- Review Windows Event Log or agent console output for errors

### **Missing data (Usage, Capacity):**

- Check the Permissions tab in Settings > Agents
- Ensure admin consent has been granted for required API scopes
- The agent auto-retries permission-gated APIs every 15 minutes

### **Authentication failures:**

- Verify the signed-in user has Power BI Admin role
- Check Azure AD app registration permissions
- Try clearing the MSAL token cache and re-authenticating

## 9. Support

For installation assistance or troubleshooting:

**Email:** [support@summitview.app](mailto:support@summitview.app)

**Security:** [security@summitview.app](mailto:security@summitview.app)

**Web:** [summitview.app](https://summitview.app)