

Installer Checklist

Use these checklists to make sure you plan and prepare for your K2 installation, to keep track of what has been done during and post-installation, and your environment configuration values.

The checklist covers the following sections:

- [Plan](#)
- [Prepare](#)
- [Install](#)
- [Configure](#)

Plan

Use these tables as a checklist to plan for your K2 installation.

Know your environment		
<input type="checkbox"/>	Read the Plan overview of the ICG?	
<input type="checkbox"/>	Understand the K2 components and considered the machines needed for your environment?	
<input type="checkbox"/>	Provisioned the needed K2 servers?	Names and roles of provisioned servers:
<input type="checkbox"/>	Are you using server farms? Have you identified the farm names?	List the farm names:
<input type="checkbox"/>	Do you have your machine details?	Have you gathered your machine names, IP addresses, know their hardware specifications and the versions of software installed on them (Windows version, SQL,

		SharePoint etc.)
<input type="checkbox"/>	Do you know details of your identity store ?	Are you using Active Directory or SQL when you install K2?
<input type="checkbox"/>	Do you know the details for your Network?	Firewall, Ports in use, cloud details (AAD subscription details), AD Domains, Load Balancing settings, security considerations .

Prerequisites		
<input type="checkbox"/>	Hardware prerequisites	Read through the topic and check the box if all prerequisites are satisfied.
<input type="checkbox"/>	Software prerequisites <ul style="list-style-type: none"> <input type="checkbox"/> K2 Server <input type="checkbox"/> Web Server <input type="checkbox"/> SharePoint Server <input type="checkbox"/> SQL <input type="checkbox"/> Client machines 	Read through the topic and check off each item as needed.

Accounts and Permissions		
<input type="checkbox"/>	Accounts used in K2	Create service accounts and assign permissions
<input type="checkbox"/>	Configure permissions	Configure permissions for the accounts

Prepare

Use this table as a checklist to prepare for your K2 installation.

Prepare for install		
<input type="checkbox"/>	Have you read the Prepare section of the ICG?	
<input type="checkbox"/>	SSL Web sites and certificates .	Have you obtained a certificate issued by a CA trusted by Windows?
<input type="checkbox"/>	Firewall ports	If firewalls exist in your environment, you may need to configure ports.
<input type="checkbox"/>	Supporting Components	<p>A number of supporting components need to be set up before installation.</p> <ul style="list-style-type: none"> <input type="checkbox"/> DNS <input type="checkbox"/> IIS <input type="checkbox"/> SQL
<input type="checkbox"/>	NLB	If applicable, is your Network Load Balancing configuration ready?
<input type="checkbox"/>	User manager	Have you set up user accounts in your identity store? Ad or SQL?
<input type="checkbox"/>	Integration	<p>If you are integrating with other systems, make sure you have prepared for them.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Exchange <input type="checkbox"/> SharePoint <input type="checkbox"/> Azure SQL Database (optional) <input type="checkbox"/> SAP (K2 Connect)

Install

Use this table as a checklist for installing K2.

Installation		
<input type="checkbox"/>	Have you read through the Installation overview topics?	
<input type="checkbox"/>	K2 Five	<p>is installed as either:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Simple Installation (Full Install) <p>or in a distributed environment:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Core components <input type="checkbox"/> K2 server / database <input type="checkbox"/> K2 Site <input type="checkbox"/> Client components
<input type="checkbox"/>	K2 for SharePoint App Deployment	The SharePoint Timer service must be running before App deployment.
<input type="checkbox"/>	Language Pack	
<input type="checkbox"/>	Unattended Installation	<ul style="list-style-type: none"> <input type="checkbox"/> Have you generated installation XML file? <input type="checkbox"/> Have you performed the unattended installation?

Configure

Use this table as a checklist for your post-installation tasks.

Post-installation configuration		
<input type="checkbox"/>	Have you read through the K2 environment configuration topics?	
<input type="checkbox"/>	K2 server	Check that you have configured anything you need after installation.
<input type="checkbox"/>	K2 Site	Do you need a second runtime site or maybe want to set up multi-authentication ? Read through the topics and configure as needed.
<input type="checkbox"/>	Integration	<p>If you are integrating with other systems, make sure you have prepared for them.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Salesforce <input type="checkbox"/> Oracle <input type="checkbox"/> SAP (K2 Connect)
<input type="checkbox"/>	Mobile devices	Do you intend using mobile devices to manage tasks?
<input type="checkbox"/>	Client browser settings	Have you configured your browser settings?
<input type="checkbox"/>	K2 Management	Have you set up permissions in K2 Management?