

Installer Checklist

Use these checklists to make sure you plan and prepare for your K2 installation. 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 | A number of supporting components need to be set up before installation. <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 | If you are integrating with other systems, make sure you have prepared for them. <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"/> | 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? |