

# Client Hosted - Install - Pre-flight checklist

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This checklist is designed for all Claromentis customers who are providing OnPremise infrastructure. This checklist will be used by Claromentis team in order to determine whether the installation of Claromentis platform can proceed. Therefore it is a requirement for customer Technical team to sign off this checklist before the installation can be confirmed by Claromentis project team.

Customer to check that Claromentis will be given the necessary connection details and permissions as follows:

- Methods of remote server access supported by Claromentis:
  - Direct RDP / SSH
  - IP restricted direct RDP / SSH
  - Splashtop screenshare
  - VPN - limited, please see the link above
- Server specifics:
  - All pending Windows Updates should be downloaded and installed onto the system prior to the install date (reboot completed, if required)
  - No additional roles or features such as IIS (Web Server) should be installed prior to the the install
- Server Access - ensure that the provided user account can:
  - Connect to the server, using the connection details provided, including VPN
  - Copy and paste from local environment into RDP session
  - Can access the internet to download the required Claromentis and third party packages
- User permissions - The following permissions will need to be granted:
  - Local admin permissions so that the Claromentis RDP user account can:
    - Manage roles and features in Server Manager
    - Manage features in Web Server (IIS)
    - Set permissions on local folders or partitions allocated for Claromentis install
    - Install 3rd party and Claromentis applications
    - Can run Powershell as Administrator
  - For load balanced servers: Provide 'Domain Admin' privileges (at least temporarily) to be able to setup the DFS Replication. Note that 'Domain Admin' privileges are required as DFS uses the Active Directory DC to sync information/data between the servers.
- URL's - The following URL's will need to be added to your 'allow list' as these URL's are accessed during our Installs and Upgrades. If the following URL's aren't reachable from the web server our upgrade or installation will fail to complete.

- packages.claromentis.net
- download.microsoft.com
- packagist.org
- github.com
- getcomposer.org
- claromentis.gitlab.io
- storage.googleapis.com
- api.github.com

Please also note these aren't just URL's but in fact hostnames, as we need to access paths within the above URL's to obtain the relevant packages.

- Databases - MSSQL

By default, Claromentis will install a MySQL database. For an existing Microsoft SQL database please provide access to a MSSQL cluster or set up a standalone SQL server. Either SQL Standard or Enterprise variant is supported. SQL Express is NOT supported.

- Customer to:
  - Install .NET Framework 3.5+
  - Create the database named 'claromentis'
  - Configure the database character set to UTF-8
  - Use UTF-8 as a default database connection character set
  - Create a 'claromentis' user and set the password to never expire
  - SQL Server authentication must be selected for 'claromentis' user. Windows Authentication method is currently not accepted
  - Enter 'dbo' in the default schema field and select 'db\_owner' under both the 'Schemas owned by this user' and 'database role membership' sections
  - Test connection to the SQL DB or Cluster, using the above user credentials
  - Provide the SQL hostname (and instance name if not a default instance), the database name, username and password.

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Last modified on 26 March 2024 by Mhairi Hutton

Created on 25 September 2018 by Stas Dreiling