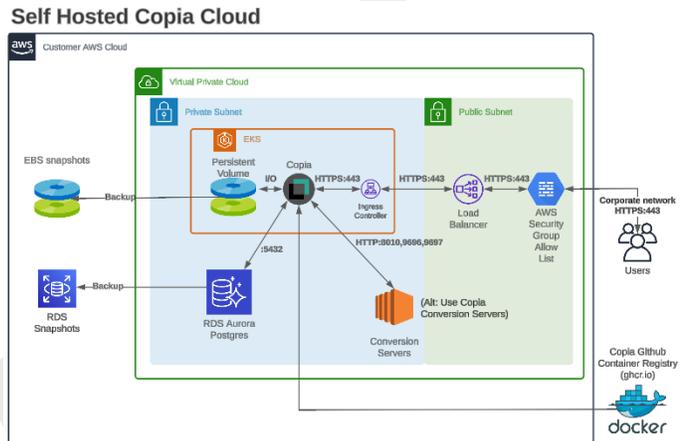


Overview

The following is a checklist that can assist with your self-hosted installation of Copia. This checklist is to work in coordination with the Copia Self-hosted Documentation, and provides an easy way to keep track of the steps you have taken, and the ones yet to complete.

Getting Started:

- Technologies:** Familiarize yourself with the technologies used
 - [Kubernetes](#)
 - [PostgreSQL](#)
 - Tooling: [kubectl](#), [helm](#)
 - [Conversion Servers](#)



Installation

The first step is to install the required software necessary for setting up your own Copia Self-hosted system. Using the [documentation provided](#), complete the following steps:

- Create a Cluster** - EKS (AWS) or AKS (Azure)
- Create a Database** - Aurora (AWS) or PostgreSQL (Azure)
- Install the CLI Tooling** - Install both kubectl and helm
- Install add-ons** - NGINX, Container Storage and Load Balancer (AWS only)
- Request Docker image access** - via the Copia GitHub Container Repository

Deployment

Now that you have installed the required software, you can now use the Helm tools to deploy your Copia instance, and build a values.yaml file to manage the configuration.

- Create your initial values.yaml file**
- Generate namespace and pod** - via Helm
- Setup your Load Balancer and Ingress**

There is a great section on [Troubleshooting](#) in the documentation, in case you run into any issues. In addition, we have provided additional information on deploying via [Terraform](#), if this is something that you are interested in.

Configuration

Great job! You now have a running Copia system. It is now time to configure the system, so it can be accessed.

- Run the Installation Wizard** - to define your custom host URL and DNS settings
- Update your DB Settings**
- Migrate your app.ini** - into your values.yaml, this is a manual step
- Configure SMTP access** - via your values.yaml

Make sure to click the "Install Copia" button to launch Self-Hosted Copia!

Conversion Servers

The final step of the process is to create and configure your Conversion Servers. These will provide the conversion process for vendor files, which is required for rendering of the data. You have two options; (1) Use Copia's, or (2) host your own. Since Conversion Servers are unique based on what devices and software your company has, we will just refer you to [the documentation](#) to complete this final, important step.

Congratulations!

You have completed your installation, deployment and configuration of Copia! There is more to learn and experience, and our dedicated Customer Success team is here to help. As you continue to explore



feel free to reach out for additional assistance via your **Customer Success Manager**, our [Contact Form](#) or support@copia.io

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