

CONFIGURATION AND ARCHITECTURE CHECKLIST

It is necessary to have complete understanding (and documentation) of your environment.

At a minimum, you need to know:

Questions / Steps	Your Answer
Number of Servers How many servers are installed?	
How many each of Controllers, Server UI instances, Workers, and MongoDB Servers do you have in each of your environments? <ul style="list-style-type: none">• Development• QC• Production	
Do you run a High Availability (HA) Environment?	
Architectural Diagram Is there an architectural diagram which visualizes the environment? If not, create one.	
Software Version Which software version of Alteryx Server do you run in your environment?	
Additional Software What additional software has been installed? <ul style="list-style-type: none">• Custom R libraries• Custom Python libraries• Third-party utilities• Connectors Not every connector needs to be upgraded, and some might not have an upgrade available.	

Data Packs

Location Insights, Business Insights, Intelligence Suite, and so on. Make a list along with versions.

- Best practice is to install matching versions of these add-ons during the upgrade, if available.
- Custom tools designed by your users or downloaded from Community, other purchased or free third-party tools.

Physical and Virtual Server Specifications

- Cores and memory
- OS version
- For more information, go to [System Requirements](#).

Configuration Options Set via Alteryx System Settings

Note configuration options including but not limited to:

- Workspaces
- Logging Directories
- Scheduler and Engine enablement settings
- Persistence settings, including:
 - Database type
 - Data folder
 - Retention options
- Server UI settings (URLs and security)
- Authentication methods and IDP information
- SMTP
- Run-as User

MongoDB

User-managed MongoDB version is independent of a Server upgrade. You might need to separately upgrade your User-managed MongoDB in parallel to a Server upgrade.

- For more information about MongoDB versions, go to [MongoDB Schema Reference](#).

Embedded Mongo and Python versions follow from the Server version and don't need to be separately noted. For more information about embedded MongoDB versions, go to [MongoDB Schema Reference](#) or [Version Support Policy](#).

Service Log-On User	