

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

### 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	