

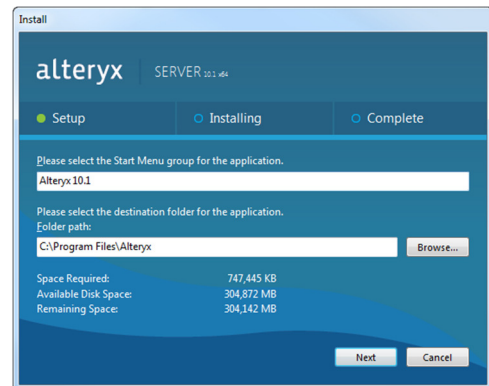
Alteryx Server Quick Start Guide

A. Installation and Licensing

Download the Alteryx Server installation package and follow the instructions below to install and license Alteryx Server.

1. Run the installer

- Run the Alteryx Server installer.
- Click **Next** to continue through each screen of the wizard.



2. Finalize the installation

- On the final installation screen, ensure that the **Configure Server now** option is selected and click the **Finish** button.

**When updating from Alteryx 9.5 or earlier, Alteryx Server deployments using the default embedded MongoDB will be prompted to run a migration utility to perform the Mongo 3.0 upgrade. Alteryx Server will not function until this migration has been completed.*



3. License Alteryx Server

- If Alteryx Server has not yet been licensed, you will be prompted to license it. Enter the **License Key** and your **Email Address** and click **Next**.
- Follow the steps on the license activation screens to install your license. If you are prompted for additional registration information, complete the fields and click **Submit**. Finally, click **Get Started** to complete the licensing process and begin using Alteryx Server.



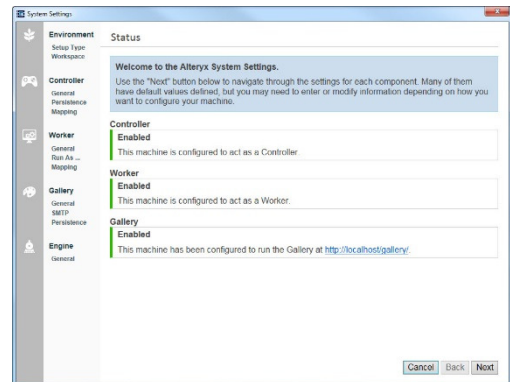
B. Configuration

Once the Alteryx Server components have been installed and the product is licensed you can configure the server settings.

Complete the following steps to configure the basic setup for Alteryx Server with all components running on the same machine. If you are configuring a multi-node instance of Alteryx Server, please refer to the *Alteryx Server Installation and Configuration Guide*.

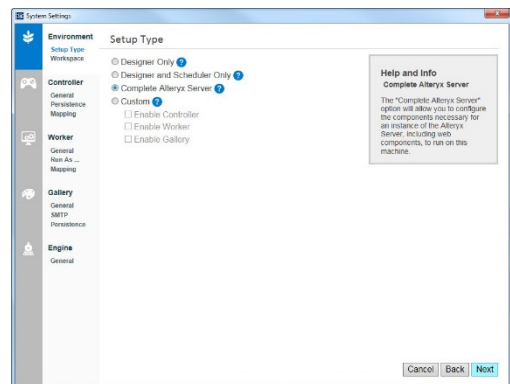
1. Open System Settings

- The **System Settings** window should open automatically so you can configure the server settings. If it does not automatically open, double-click the **System Settings** icon on your desktop.



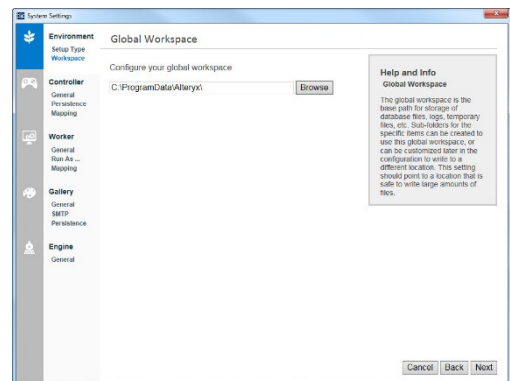
2. Specify Server Setup Type

- Click **Next** to be taken to the **Environment > Setup Type** screen.
- To configure all components of Alteryx Server to be enabled on the machine, ensure the **Complete Alteryx Server** option is selected and click **Next** to continue.



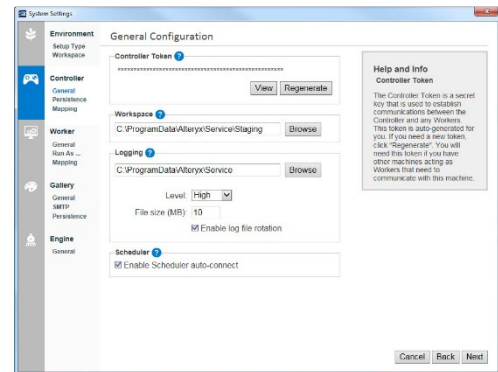
3. Set Up Global Workspace

- On the **Global Workspace** screen enter a path where temporary and working files can be stored. This will be used as the root path for other configuration options as well.
- Click **Next** to continue.



4. Configure Controller and Worker

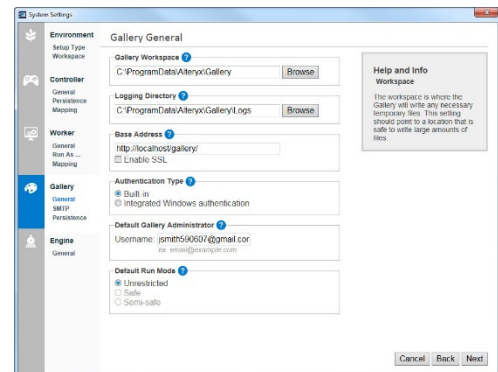
- All Controller and Worker configuration settings have default values. For a basic setup, these defaults should suffice.
- Click **Next** on each page until you reach the **Gallery > General** page.



5. Select Gallery Options

- On the **Gallery > General** page specify the URL to host the Gallery in the **Base Address** field.
- Select your **Authentication Type**. *
- Enter an email address (for Built-in authentication) or a domain user (for Integrated Windows authentication) as the user name for the **Default Gallery Administrator** and click **Next**.

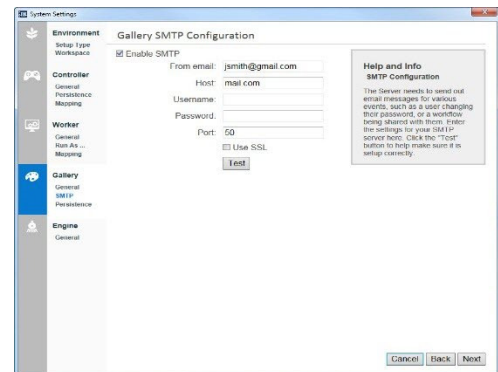
**Once an authentication type has been selected it should not be changed or Gallery functionality may be compromised.*



6. Specify SMTP Server

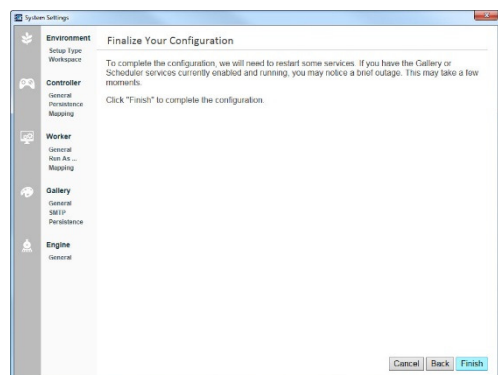
- On the **Gallery > SMTP** page specify an email address to be used as the **From Email** so the server can send email messages.
- Specify your **SMTP Host**, **Username**, and **Password** (if necessary) and click **Next**.

**Uncheck the Enable SMTP option to complete the Server setup without enabling SMTP. Email notifications from the Gallery will be disabled until SMTP settings are configured.*



7. Finalize Configuration

- Click **Next** to view or modify the rest of the Gallery and Engine settings.
- Click **Finish**. The server services will start.
- Click **Done** to close the **System Settings** window. If the Gallery has been enabled, you can go to the URL specified in Step 5 to view your Gallery.



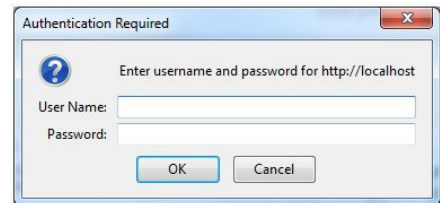
C. Gallery Administration

Once Alteryx Server is installed and configured, if the Gallery has been enabled, you can open a browser and go to the Gallery URL you specified in the **Gallery > General > Base Address** field.

If you have configured the site to use **Windows authentication** on the **Gallery > General** page, when you go to the Gallery URL you may be prompted to enter your domain credentials in order to log in.

Log in to the Gallery (Windows Auth.)

- Go to the URL specified in the **Gallery > General > Base Address** field in Step 5 during configuration.
- Enter your **User Name** and **Password**.
- Click **OK** to log in to your Gallery account.



If you have configured the site to use **Built-in authentication**, you must take additional steps when you log in the first time to create your Gallery Admin account.

Log in to the Gallery (Built-in Auth.)

- Go to the URL specified in the **Gallery > General > Base Address** field in Step 5 during configuration.
- Click **Sign In**.
- Fill out the **Sign Up** section of the form using the email address and password that was entered for the **Default Gallery Administrator**.
- Click **Sign Up**.
- Once you have logged in to the Gallery you can access the Admin page by hovering over the **Settings** icon and clicking the **Admin** option.

