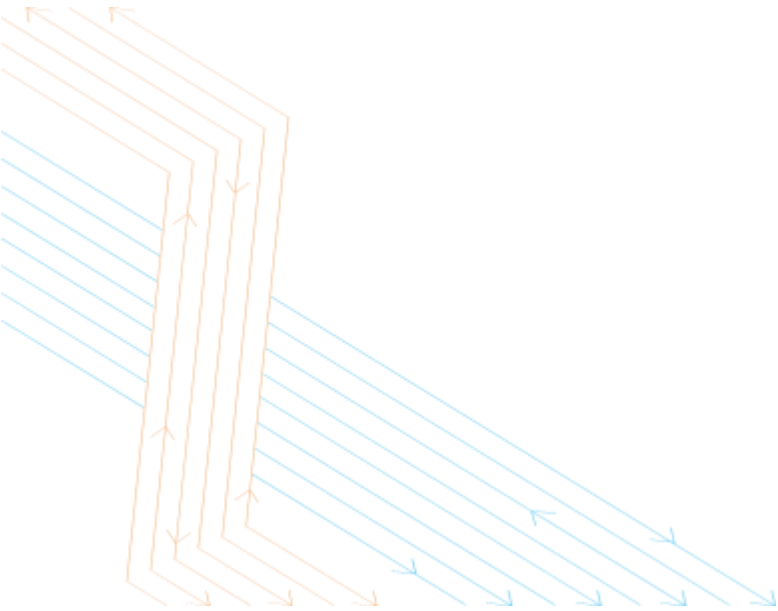


MFT Migration Playbook

DISCOVERY & PLANNING PHASE

Thru.[®]





Abstract

Thru is a cloud managed file transfer service. Migrating your scheduled file transfer interfaces from your existing legacy system to Thru can be a complex and often time-consuming project. This document will help you plan for success and provide a general framework to follow.

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Managed File Transfer Migration

Legacy system to the cloud

Introduction

Thru is a cloud managed file transfer (MFT) platform designed to address many problems associated with legacy MFT systems, including control, effort, performance and governance. Migrating your file transfer interfaces from your existing legacy system(s) to a modern cloud MFT platform is a complex and often time-consuming project. This document will help you plan for success and provide a general framework to follow.

Each migration plan is unique and determined based on the project. Some migrations are easier and more automated than others, but in every case, there are challenges to overcome. We have set out these steps to follow as a framework for the migration project:

1. Systems Audit Planning
2. Interfaces Audit & Grouping Planning
3. Project Assessment & Scoping
4. Data Mining Interface Configurations
5. Data Testing & Validation
6. Data Migration
7. Deployment

Foreword - Impact & General Considerations

1. Thru will be accessed via a different network address/URL to that of the legacy system
2. User/**system access** and **credentials**. User credentials (usernames/passwords) will be re-issued
3. Data locations/directory layout. Some changes will be implemented to the directory structure and file locations to **rationalize** and simplify the existing structure
4. The system URL (hostname) will change, so scripts and any saved connection details and domain name-based firewall rules will need to be updated
5. The MFT IP address will be different; any firewall rules / connection details using IP addresses need to be updated
6. Both systems-based and user-based access to MFT can utilize SFTP and FTPS
7. HTTPS access will be available, and partners will be able to self-manage endpoints/users/credentials

Recommended Roles & Responsibilities

The migration team should have one person representing the customer and one person from Thru. The customer's representative should act as the migration lead. This person will coordinate all aspects of the migration rollout. Thru's delivery manager will be part of this team to advise on best practices acting as an advisor to the migration.

Definitions

1. **Interface:** The source or target system to which the enterprise connects
2. **Endpoint:** The endpoint is the connection to the interface, so this will have attributes such as a protocol and connection type, i.e., SFTP server
3. **Flow:** A flow is the entire file process from source to target, along with the configurations, i.e., Supplier SFTP client push to Enterprise SFTP server, Schedule = Every Monday at 5pm

Step 1. Systems Admins Audit | Planning

In this step, we gather the tools, permissions and people that will enable us to capture details of all the file transfer interfaces.

Questions	Context
Where are the current file transfer systems?	What is being currently used by the Enterprise to exchange and transfer files?
Are the systems centrally managed?	Migration will require access to current systems.
Is there a detailed report of all automated file transfer interfaces?	
Is there a detailed report of all the internal and external users for file sharing use cases?	

With the above information, we can collect information about the interfaces.

Step 2. Interfaces Audit & Grouping | Planning

With the systems audit complete, we can segment all the interfaces into common patterns based on connection. This will help create migration phases based on the segments and create a clear view of the file transfer landscape across the enterprise.

This lists the information required to break the interfaces into similar categories, e.g., all the external SFTP client interfaces that interface with the enterprise.

This is not exhaustive but gives an idea of what needs to be collected

Source Interface	Protocol	Target Interface	Protocol	Total
<i>Internal Server</i>	<i>SFTP</i>	<i>External Client</i>	<i>SFTP</i>	<i>n</i>
<i>Internal Server</i>	<i>SFTP</i>	<i>Internal Server</i>	<i>SFTP</i>	<i>n</i>
<i>Internal Client</i>	<i>SFTP</i>	<i>External Client</i>	<i>SFTP</i>	<i>n</i>

Step 3. Project Assessment | Scoping

With the interfaces and grouping audit complete, we can understand the scale and magnitude of the migration. Then, we can plan the project in relation to resources required, impact and timelines. The output of this stage is a project plan for each interface category.

Step 4. File Flow Information Gathering

For each interface, the details of each **flow** will need to be captured and mapped to Thru. How this data is captured will be part of the plan created in Step 3. This information will include, for example:

- Host
- User
- Password
- Path
- Schedule
- Type
- Protocol
- Certificate
- SSL Key
- Encryption
- Compression
- Rename

Step 5. Flow Creation

Flows will either be manually created in Thru or uploaded via our migration utility program (MUP). MUP transforms the file flow information gathered from a .csv file to Thru flows.

Step 6. Flow Test

Flows are now migrated to Thru and can be tested with test endpoints. Once they pass the test, endpoints can be promoted and turned-on using production endpoints.

Step 7. Deployment

Thru is now ready for production. Remember, Thru is a service and manages all the back end infrastructure. The backend has been deployed and the customer can start using the service.

SFTP Client Software

This section guides partners in their choice of SFTP client software if necessary; choosing a software listed here is not mandatory. This list is of SFTP client software already deployed and used by Thru. Thru can provide limited help and support when or if support is necessary.

1. FileZilla
2. WinSCP – a GUI-based file transfer tool facilitating SFTP/SSH file transfer through a “file explorer” type interface.
3. PuTTY/PSFTP – a command line SFTP/SSH file transfer tool suited to scripting rather than end user needs.
4. SFTP – a command line SFTP/SSH file transfer tool available on most Unix platforms suited to scripting rather than end user needs.

Common MFT Patterns Table

Diagram #	Pattern	Direction of Connection	Use Case	External Connection Impact	Enterprise Impact
1	Internal User	MFT to User	Ad hoc secure and large file transfer	Seamless – no change	Users need to be authenticated with Thru.
1	External User	MFT to User	Ad hoc secure and large file transfer	Requires new credentials from MFT	User needs to be manually created or imported to Thru
2	External Server	MFT to Server	Enterprise pushes or pulls data	Needs to whitelist Thru connection	No change to connection
3	External Client	Client to MFT	Client pushes or pulls data	Needs new user, password, host, key and folder path for Thru	No change to connection

Managed File Transfer Deployment

Thru is a cloud managed file transfer platform. We do not offer an on-premises solution as you may have today. The cloud options are as follows:

- Thru is deployed in all our Azure datacenters based in the US, UK, DE, or AU
- Thru can also be deployed in your Azure or AWS virtual private cloud if you have one

MFT as a Service. We manage the infrastructure and backend operations, providing you a service. For example, disaster recovery and high availability come as standard. Furthermore, the platform is production ready so there is nothing for you to deploy.

Trusted by Companies Worldwide





We help you:

Achieve faster and simpler file transfer integration

Promote IT productivity with our no-code interface

Eliminate scaling and server maintenance costs

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