MFT Migration Playbook

LEGACY SYSTEM TO THE CLOUD

Discovery & Planning Phase

Version 1.3

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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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.

Thru 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.

> Note: However, the Thru Node (an MFT agent) integrates seamlessly with internal networks for local file system integration between on-premises storage and cloud services. This hybrid architecture extends MFTaaS value to legacy data repositories without migration needs, while gaining cloud scalability.

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

Thru manages 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.

The Migration Plan

Each migration plan is unique and is determined based on the project. Some migrations are easier and more automated than others, but in every case, there are challenges to overcome.

Recommended Roles & Responsibilities

The migration team should have at least one person representing the customer and at least 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.

Compete the following table to capture names and contact details of the migration team:

Migration Team Member	Company	Name	Contact Information
Migration Lead	Customer		Phone: Email:
Delivery Manager	Thru		Phone: Email:
			Phone: Email:
			Phone: Email:

Impact & General Considerations

Before getting started, here are some things to be aware of:

1. **Network Address/URL:** Thru will be accessed via a different network address/URL than 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. **Hostname:** 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.

Definitions for Thru's Automated File Transfer (AFT) Solution

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.

Migration Plan Steps

The following steps are recommended as a framework for the migration project:

1. [Systems Admins Audit | Planning »](#)
2. [Interfaces Audit & Grouping | Planning »](#)
3. [Project Assessment | Scoping »](#)
4. [File Flow Information Gathering »](#)
5. [Flow Creation »](#)
6. [Flow Test »](#)
7. [Deployment »](#)

Step 1: Systems Admins Audit | Planning

The answers to the following questions will help you assemble the tools, permissions and personnel needed to capture details of all 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?	

Step 2: Interfaces Audit & Grouping | Planning

After completing the systems audit in Step 1, 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.

Using the following table as an example, list the information required to break the interfaces into similar categories, e.g., all the external SFTP client interfaces that interface with the enterprise.

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

Source Interface	Protocol	Target Interface	Protocol	Total
Internal Server	*SFTP*	*External Client*	*SFTP*	*n*
Internal Server	*SFTP*	*Internal Server*	*SFTP*	*n*
Internal Client	*SFTP*	*External Client*	*SFTP*	*n*

Step 3: Project Assessment | Scoping

With the interfaces and grouping audit complete, we can better understand the scale and magnitude of the migration. Now, 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. Details of each interface are gathered in the next step.

Step 4: File Flow Information Gathering

For each interface to Thru's AFT solution: The details of each process need to be captured and mapped to Thru as a flow. The required information includes details such as

- Host
- User
- Password
- Path
- Schedule
- Type

- Protocol
- Certificate
- SSL Key
- Encryption
- Compression
- Rename

How this data is to be collected is part of the plan previously created in Step 3.

Step 5: Flow Creation

How this step is executed is specific to each cloud MFT solution.

In Thru's automated file transfer (AFT) product, use the collected information to configure a flow as follows:

1. Establish your organizational settings.
2. Associate endpoints with your organizations.
3. Configure your designated flow.
4. Enroll your organizations in the chosen flow.
5. Customize Flow Studio settings.

Step 6: Flow Test

Flows are now migrated to Thru and can be tested with test endpoints.

After successfully passing the tests, endpoints can be promoted and activated using production endpoints.

Step 7: Deployment

Your Thru deployment instance is now ready for production.

The backend has been deployed and the customer can start using the service.

Remember, Thru is a service and manages all the back end infrastructure.

Questions?

If you have any questions about the MFT migration process or file transfer in general, please contact a Thru MFT expert: thruinc.com/contact-us/

Appendix

SFTP Client Software

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

Software Name	Website	Description
FileZilla	https://filezilla-project.org/	A cross-platform FTP application, consisting of FileZilla Client and FileZilla Server.
WinSCP	https://winscp.net/eng/index.php	A GUI-based file transfer tool facilitating SFTP/SSH file transfer through a "file explorer" type interface.
PuTTY/PSFTP	https://www.puttygen.com/psftp	A command line SFTP/SSH file transfer tool suited to scripting rather than end user needs.
SFTP	https://en.wikipedia.org/wiki/SSH_File_Transfer_Protocol	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

Pattern	Direction of Connection	Use Case	External Connection Impact	Enterprise Impact
Internal User	MFT to User	Ad hoc secure and large file transfer	Seamless – no change	Users need to be authenticated with Thru.
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
External Server	MFT to Server	Enterprise pushes or pulls data	Needs to whitelist Thru connection	No change to connection
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

Thru Helps You

Since Thru's inception in 2002, we have offered managed file transfer as a service (MFTaaS), which helps your organization to:

Achieve faster and simpler file transfer integration.

Promote IT productivity with our no-code interface.

Eliminate scaling and server maintenance costs.

Certifications & Third-Party Risk Assessments

AICPA SOC · BITSIGHT · Security Scorecard · cybervadis · CYBER ESSENTIALS CERTIFIED

Trusted by Companies Worldwide

Home Office · HISCOX · HITACHI Inspire the Next

NCA National Crime Agency · CITIZENS PROPERTY INSURANCE CORPORATION · tomtom

Sage · JM Johnson Matthey Inspiring science, enhancing life · National Gas

ACI UNIVERSAL PAYMENTS · BAYER · NetworkRail

Cartier · crocs™ · GE VERNOVA