Azure-EFT Usage Instructions

THE INFORMATION IN THIS ARTICLE APPLIES TO:

- EFT v7 and later

DISCUSSION

You don't need to have your own infrastructure and server hardware to deploy an enterprise-level managed file transfer (MFT) server. Instead, you can build and scale EFT in the cloud using Azure. This article describes how to get started with this type of cloud-based deployment.

Prerequisites

To run EFT on Azure, you need the following:

- An Azure account
- A license key if you plan to use EFT past the 30-day evaluation period

Licensing

The EFT image includes a fully functional, preconfigured copy of EFT that will operate without a license for 30 days. After the evaluation period is over you will need to provide a license key in order to continue using the software. The license key is not restricted to an EFT running in the cloud, but is restricted based on the number of servers licensed. For more information on licensing please refer to EFT’s End User License Agreement or contact Globalscape sales.

Create VM

If you haven’t done so already, log on to your Azure account and visit the Azure marketplace and search for “Globalscape”. Locate Globalscape's EFT server offering, select it, and then click Create. Specify your desired configuration settings, and make note of the admin username and password you enter, as you will need them later. Click Purchase to deploy an instance of EFT. Azure’s setup process will create and launch an instance EFT, which could take several hours.

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Quick Test

Once the image has been deployed:

1. In your web browser, type https://<instance_ip_or_host_address> . If the connection fails then you should try again in a few minutes.
2. If you get a security warning in your browser, select the option to proceed. The browser is simply alerting you to the fact that the SSL certificate used by the site is unsigned (self-signed), and thus untrusted. More on SSL certificates below.
3. At the login page, type in the user account credentials as follows:

   Username: testuser

   Password: Alaska!!

4. You will be prompted to change the test account's password upon initial login.
5. If the login fails, then please contact our support team or RDP in and use EFT's administration interface to manually configure EFT (in the rare event that the EFT setup script failed)
6. If the login succeeds, then EFT's Web Transfer Client (WTC) interface will appear after a few moments, and you will be able to transfer files from/to EFT server, using the intuitive controls provided. The web client represents a tiny sub-set of EFT's functionality, and in fact isn't necessary if purely automated transactions will be conducted between systems; however, it is a good way to test that the server is running and is useful when person-to-business or person-to-person transfers are also needed.

EFT Administration

To take full advantage of EFT you will need to configure it beyond the preconfigured settings. This includes security settings that meet your internal policies, user provisioning, and creation of workflows that depend on triggers such as files being uploaded, files deposited into a "hot" folder, or recurring scheduled events. To configure EFT:

1. Establish a remote desktop session to the running instance. From the Azure portal, select the virtual machine you created and click on the Connect icon. Type in the administrator username and password you typed in when creating the image.
2. Once logged in to Windows, click on the EFT administrator shortcut located on the

desktop.

3. When the administrator interface appears, you will be asked which server you want to administer. Select Local server and click OK or next.
4. On the next screen, select Windows Integrated Authentication and click Connect.
5. Once connected to EFT's admin console, you may configure EFT to your liking, which could include things like adding more users to the default Site, creating a new Site (which is like a virtual host that can have its own unique authentication mechanism, IP mappings, protocols, and security settings), changing default settings, or start experimenting with EFT's automation capabilities, which includes EFT's powerful Event Rules and Advanced Workflows features.
6. The complete documentation on EFT administration can be found on Globalscape's support website.

Next steps

1. If you plan on using this EFT in a production environment, and assuming it's been licensed, then do not forget to replace the test SSL certificate that was generated for EFT with a CA signed certificate. Please note that the test certificate private key password was a large random number that cannot be recovered.
2. If you plan on using this EFT in a production environment, then you will probably want to audit to a separate SQL server, rather than the provided SQL Server Express edition. In order to both change EFT's audit settings AND create the schema on the target SQL server you will need to re-run the installer, choose Modify, and then follow the instructions when prompted to set EFT auditing and reporting. Alternatively, you can contact our support team for assistance.

Do not hesitate to contact our sales team if you would like to see a demo or have specific questions you would like answered.

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