# MOVEit Transfer
# Getting Started Guide

**ipswitch**

MOVEit TRANSFER

# Contents

# Check Prerequisites

## License File

Save the license file that is attached to the MOVEit Transfer thank you email. MOVEit Transfer requires a license file to install and operate. For details, see the Ipswitch Knowledge Base and search for this topic: *How do I download my license file*.

The installation program first checks for required software and displays a message if any of the required software is missing.

For complete list of system requirements see the ***Release Notes http://docs.ipswitch.com/MOVEit/DMZ90/ReleaseNotes/en/index.htm***.

## Microsoft .NET 4.5

When installing on Windows 2012, Microsoft .NET 4.5 is already installed with the operating system.

When installing on Windows 2008 R2, if the install program does not detect Microsoft .NET 4.5, you are prompted to download and install it.

Note: you need Internet connectivity for this step.



Click Yes to download and install the .NET 4.5 software. This can take several minutes to complete. When complete, the Welcome dialog opens.

# Run the MOVEit Transfer Installation

This installation program installs MOVEit Transfer and its services on a server.

These services include:

- Web Application (HTTP - HTTPS)
- FTP Server (FTP - FTPS)
- SSH Server (SFTP)
- MySQL Database Server - Express Setup, the default selection, installs MySQL on the local machine.

### Installation

**1** The WELCOME screen opens. Click Next. The License File screen opens.

**2** Read and accept the license agreement. Click Next.

**3** Click Browse and select the license file, which was attached to the MOVEit Transfer thank you email. Click Next.

**4** On the SETUP OPTIONS screen, select Express Setup for an evaluation installation.

Express Setup uses the default values for the following items:

- Application Folder: C:\Program Files\MOVEit
- Filesystem Folder: E:\MOVEitDMZ (*largest local drive*)
- Credentials: Use Suggested (*automatically generated*)
- New IIS Web Site: MOVEitDMZ
- Certificate: Create New Test Certificate

**5** On the SITE IDENTITY screen, specify the URL for users to connect to MOVEit Transfer and how MOVEit Transfer sends email notifications.

### Site Identity Options

- Public URL

The URL for users to connect to this server. Email notifications will be sent with this URL, regardless of the internal hostname or IP address of this server.

Note: IP addresses and hostnames are valid, but should only be used for testing and evaluation purposes.

Examples:

- Installing into a website: https://moveit.somedomain.com.
- Installing into a virtual folder of a website: https://www.somedomain.com/moveit.

- Email Server

  The email server that MOVEit Transfer uses to relay email. An IP address is a valid entry. For example, mail.somedomain.com

- Email Address for Errors

  Occasionally MOVEit Transfer sends errors and other administrative notices using this address.

  Recommended:   Use a valid address that is checked regularly.

  For example, support@somedomain.com

- Return Email Address

  The "From" address that will be used on all email notifications.

  Recommended: Use a valid address, because end-users might reply to this address.

  For example, notify@somedomain.com

After installation is complete, any of these values can be changed in the MOVEit Transfer Config Utility.

**6** On the READY TO INSTALL screen, review your selections and click Next.

**7** Installation Complete screen. MOVEit Transfer has been installed successfully.

Successful Install Options

- View Installation configuration, including Passwords

  Opens a text document with all the configuration settings and passwords that have been used. This is the only chance to verify any suggested passwords.

Important: Be sure to view the Installation configuration and write down the password for the sysadmin account. You need this password to log into MOVEit and set up your organization, users, and other settings.

- View the installation log file

  A file containing all the install steps. Useful for debugging installation issues.

- Securely upload the installation files to your MOVEit Transfer

  Saves your installation parameters as an encrypted file on disk. Only SysAdmins can view these files.

- Securely delete the installation files (with overwrite)

  Deletes all configuration files that were generated during the install.

  Highly Recommended: Select this option so that unencrypted passwords do not remain on the MOVEit Transfer server.

If you choose either of the first two options, you must close the text document before continuing to the next installation screen.

**8** On the MOVEIT TRANSFER HAS BEEN INSTALLED SUCCESSFULLY screen, select the Finished Installation options.

### Finished Installation Options

- **Launch the MOVEit Transfer Configuration Utility**

  Launches the utility that allows you to make changes to your MOVEit Transfer system. You can set configuration values that are not handled by the installation.

- **Launch SecAux Security Program**

  Launches the security program to further harden your operating system.

**Highly recommended**: Run the SecAux program on production servers that will be made available on the internet.

  SecAux can disable unnecessary services, apply a Windows Security Policy, rename your Windows Administrator account, optimize Windows and IE settings and configure NTFS permissions.

- **Launch the MOVEit Transfer Installation Check Utility**

  Launches the MOVEit Transfer Check Utility which is used to test various components of the MOVEit Transfer system and verify that they are in working order.

- **Launch MOVEit Transfer web session (as the SysAdmin)**

  This will start you with adding a new organization and adding additional users. This step is highly recommended.

If you select multiple options here, each program/utility is displayed after the current one is closed.

After you close any open program/utility, the setup program prompts you to delete the installation configuration and log files. Doing this provides an extra measure of security.

# Create an Organization

After you sign in to the MOVEit Transfer server for the first time, your first task is to create an Organization that contains your users, groups, folders, and files.

The Add a New Organization wizard opens.

### Step 1 - Name, Passphrase, and Technical Contact

- **Name**. The name with which your organization is displayed. The name is visible to users when they are signed in to the system. **Suggested**: Use a name that is similar or identical to your company name, because this name will be visible to your users when they are signed on to the system. This value can be changed after the organization has been created.

- **Passphrase**. The passphrase is used to generate the encryption keys that will protect the files that are uploaded to your organization.

  **Recommended**: Use the automatically-generated passphrase. It is guaranteed to meet the strength requirements imposed by the system

  If you do not approve of the automatically generated passphrase, you can refresh the page to generate a new one. To create your own passphrase, select User Own Passphrase and provide the passphrase.

  *Requirements*:   The passphrase must have a minimum of 8 characters, and must contain a minimum of one letter and one number. For security reasons, make the passphrase as random as possible.

  **Important**: The passphrase *cannot be changed* after the organization has been created, and it *cannot be recovered* if lost. MAKE SURE YOU WRITE DOWN THIS PASSPHRASE AND/OR PRINT THIS PAGE.

- **Technical Contact**. The name, phone number, and email address of the primary technical support contact for your organization, such as your helpdesk group, or customer service team. This information will be provided to users in notification emails, and on the Tech Support page. These values can be changed after the organization has been created.

Before you continue, you must confirm that you have written down and/or printed your organization passphrase and safely stored it.

### Step 2 - Host Access Rules

Host access rules define the hosts and IP addresses where your users and administrators can log on to the system. More rules can be added at a later time.

- **Allow (End) Users to Connect From**. Defines hosts where your end users can initially log on to MOVEit Transfer. Most organizations will want to allow end users to connect from anywhere, so the default mask is * . * . * . *

- **Allow Administrators to Connect From**. Defines the hosts where your administrator users can initially log on to MOVEit Transfer. The default mask is `10.*.*.*` which allows administrators to connect from their internal network.

### Step 3 - Add an Administrator

This step creates your first administrator account in your new organization. The username cannot be changed after the account is created, but the password and email address can.

- **Username**. The sign-on name of the new administrator account. The username cannot be changed after the account is created, but more accounts can be created and this one deleted at a later time.
- **Password**. Use the recommended automatically-generated password, or select **Use Own Password** and enter your own. The password for this account can be changed at a later time.
- **Email Address**. The email address to which notifications for this administrator account are sent, when events such as user and IP lockouts, and user expirations occur. If you do not want the account to receive notifications, leave the field blank. The email address for this account can be changed at a later time.

### Step 4 - Finished

Your organization is created, along with your initial host access rules and your new administrator account. Click **Finish**. You are returned to the Sign On screen with your new administrator username prefilled. Enter the account password and click **Sign On**.

On your home page, tips are provided regarding what to do next, including uploading a logo image for your organization, choosing a color scheme, and adding user accounts.