Titan MFT SERVER

Getting Started Guide

A detailed onboarding reference for deployment, configuration, connectors, job automation, and administration of Titan MFT.

South River Technologies | Confidential Customer Guide

Getting Started *with* TitanMFT

To begin with **Titan MFT,** deploy and start a Titan MFT Server from the Azure, GCP or AWS Marketplace. Titan MFT will already be installed on the local system, with a default configuration existing within the product to help get up and running smoothly. Once successfully connected to the Server system, launch Titan MFT using the Desktop Icon.

> **NOTE:** *A folder is placed on the Desktop with helpful files*

Initial Setup Steps

1. **Review and Accept EULA** On first launch of MFT, you'll be prompted to review and accept the EULA.
2. **Create Administrator Account** Create an Initial Administrator Username and Password to login

ACTIVATION AND LICENSE INFORMATION

One of the first menus you'll want to familiarize yourself contains the version of Titan MFT installed, Licensing information, and methods to check for and download any updates:

- Choose the "**Home**" option from the Top Left Menu and then move to the "Product Info" tab to view Product and License Information

License Management and Updates

Activate License Choose "Add license", enter the Registration Code that corresponds to your license, and then apply that license **NOTE:** Subscription Licenses will remain active so long as Subscription is renewed

Deactivate License Select the "Deactivate" license option from the

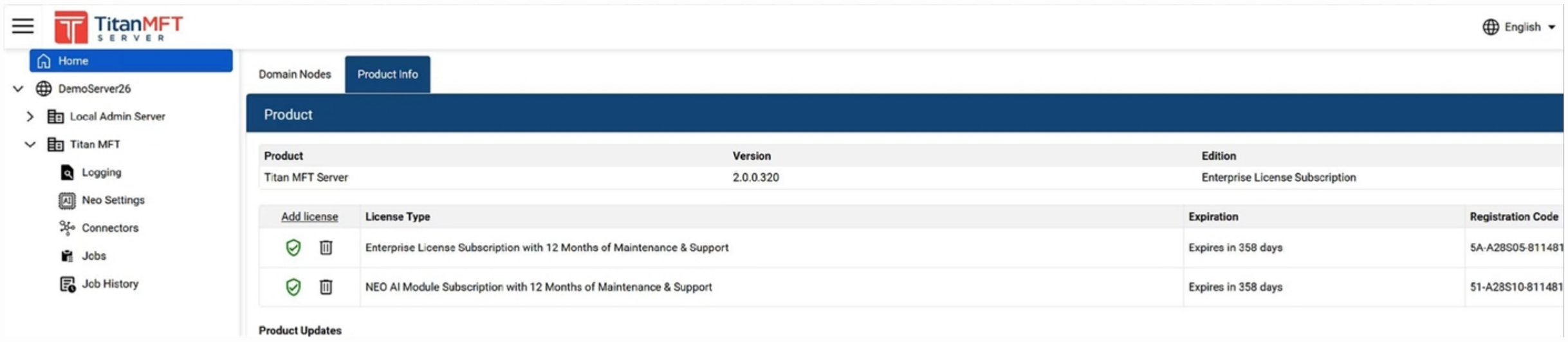
left of the currently activated license to discontinue use of this license

Check for Update Use the "Check for Update" Icon from the upper right to manually check for updates

Download Latest Update Click the "Download" link under the

Download URL to download the latest version

Install Update After downloading, Run the latest Titan MFT installer to install the latest version for use



CONFIGURATION WITHIN LOCAL ADMIN SERVER

Within the Local Admin Server menu on the left, you can choose Logging options for the Local Admin, Brand/Customize the Admin UI, configure an SMTP (Email) Server, as well as set an Idle Timeout for Administrators. In addition, you can configure and setup Titan Neo for AI integration (separate purchase required for use).

> **NOTE:** *When configuring or making changes to settings, ensure to click the Checkmark icon in the upper right of whichever menu you are viewing to Apply and Save changes*

Brand/Theme

- Use this menu to customize the Brand and Theme for your Titan Server. **Including:** *Logos, Descriptions, Copyrights, Text, URL, Headers, Footers, Colors, and Login Messaging*

Email

- Configure SMTP and SMS information to allow Titan MFT to send emails/SMS messages (if desired)

Logging

- (Pull this info from current Titan SFTP/MFT Guides)

Connections

- Configure the Idle Timeout value. Once an authenticated Administrator login reaches this amount of time sitting idly, the Admin account will be logged out and would require a new login

NeoConfiguration

> **NOTE:** *Titan Neo Integration is an optional add-on and requires a separate purchase to enable AI-based capabilities*

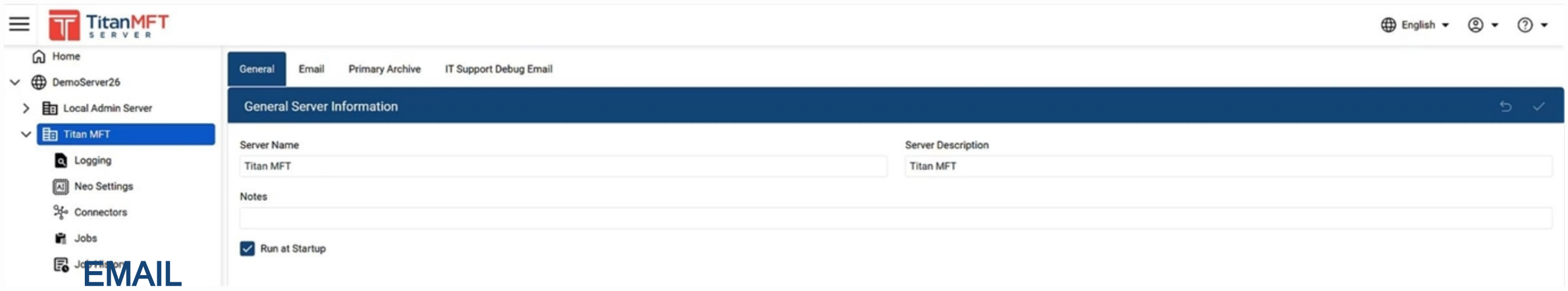
- Use the dropdown to select an AI Provider that you use and you would like to have configured to work with Titan MFT.
  - Once you've selected a provider, the related configuration information will display for you to authenticate and select the supported AI Model for use.
  - Test Connection options can be used to verify connection and authentication to your AI Provider as configured
  - You may configure more than one AI Provider if you prefer
- Ensure that you use the dropdown menus to Set Preferred AI Provider for the various functionalities for which it can be used
- When finished, click the Checkmark in the upper right to Apply and Save

CONFIGURATION OF SPECIFIC TITAN MFT INSTANCE

Top Level Menus

GENERAL

- Define Server Name and Description and provide any Notes
- Enable "Run at Startup" if wanting Titan MFT to start automatically when the server system is started



EMAIL

- Configure SMTP and SMS information to allow Titan MFT to send emails/SMS messages for this specific Titan MFT instance

PRIMARY ARCHIVE

- Use this menu to decide whether to make use of Primary Archiving and define rules such as when to archive, what files to keep, and retention periods for keeping archive data

IT SUPPORT DEBUG EMAIL

- Use this menu to define when to send Email Notifications to Support Teams and what address to send these to

> **NOTE:** *Ensure SMTP Server is configured if wanting to send emails*

Logging

Use this menu to enable and define rules for Log Files

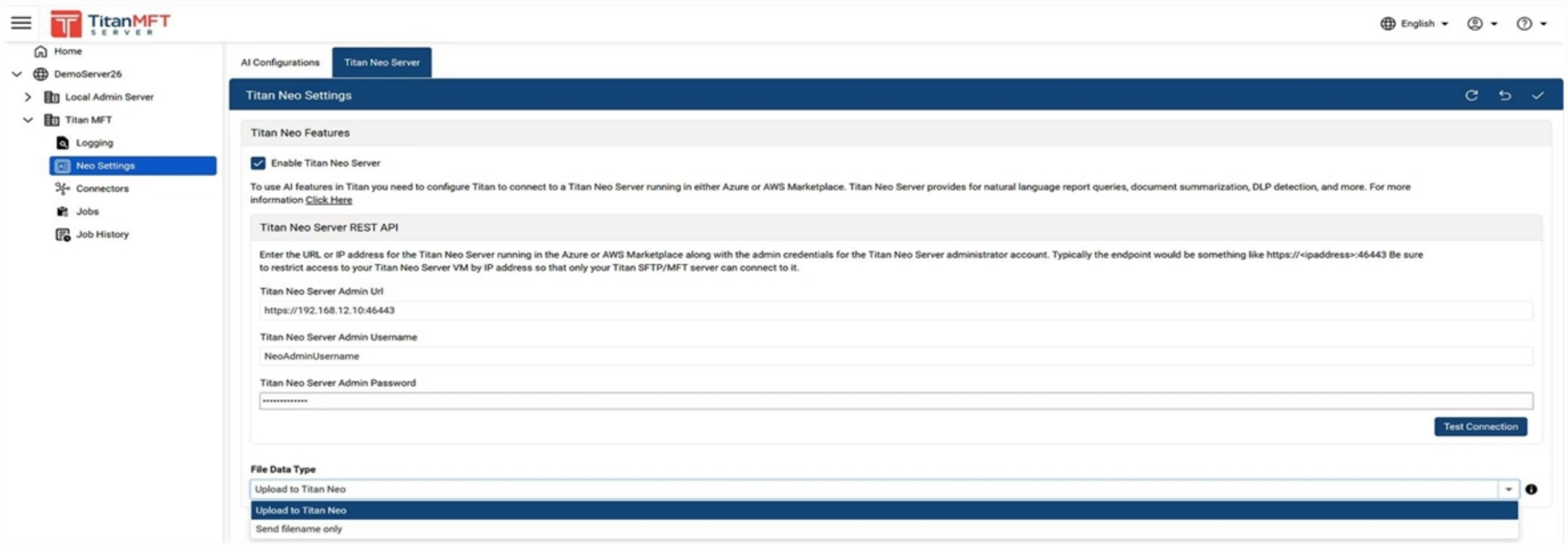
- Includes support for SysLog Servers, several formatting options, various levels of detail for the log files, and rotation scheduling

Neo Settings

Titan MFT can leverage AI functionality of Titan Neo

NOTE: *Separate purchase required for use of Titan Neo integration*

- **AI Configurations:** This menu allows inheriting settings from the Local Admin Server configuration menu, or disabling this option and configuring for this individual server instance.
- **Titan Neo Server:** On this menu, check the box to "Enable Titan Neo Server"
- **Titan Neo Server Admin URL:** URL or IP Address for your Titan Neo Server
    - *Typically something like https://IPADDRESS:46443*
- **Titan Neo Server Admin Username**
    - Username of the Administrator account used for Titan Neo
- **Titan Neo Server Admin Password**
    - Password of the Administrator account used for Titan Neo
- **Test Connection:** Use to verify URL/IP and Credentials
- **Enable Document Viewer:** Enable this option to allow Document Viewing when opening a file in the WebUI
- **File Data Type:** Select from the Dropdown menu
    - **Upload to Titan Neo:** Use this option if Titan Neo and Titan MFT do NOT share a common file system where these files reside
    - **Send filename only:** Use this option if Titan Neo and Titan MFT share a common file system where the files reside. Performance will improve, as Titan Neo and Titan MFT can reference the same file (based on filepath and filename) instead of needing to send the actual file for processing and use by Titan Neo



Connectors: View, Add, and Edit

In **Titan MFT**, a "Connector" is a specified and authenticated connection to another server (or the local File System). Connectors can be File System, SFTP, FTPS, Google Drive, SharePoint, Amazon S3, etc.

Creating a Connector

- **Use** the "**+**" arrow in the upper right to get started, and complete the connection information that is unique to the Connector Type selected
- **Use the Test Connection** option to verify credentials and information
- **Check Additional Settings** options in the dropdowns that are unique to each Connector Type (e.g. "SFTP Settings" for SFTP connections)
- **Click "Save"** at the top to store the Connector within Titan MFT

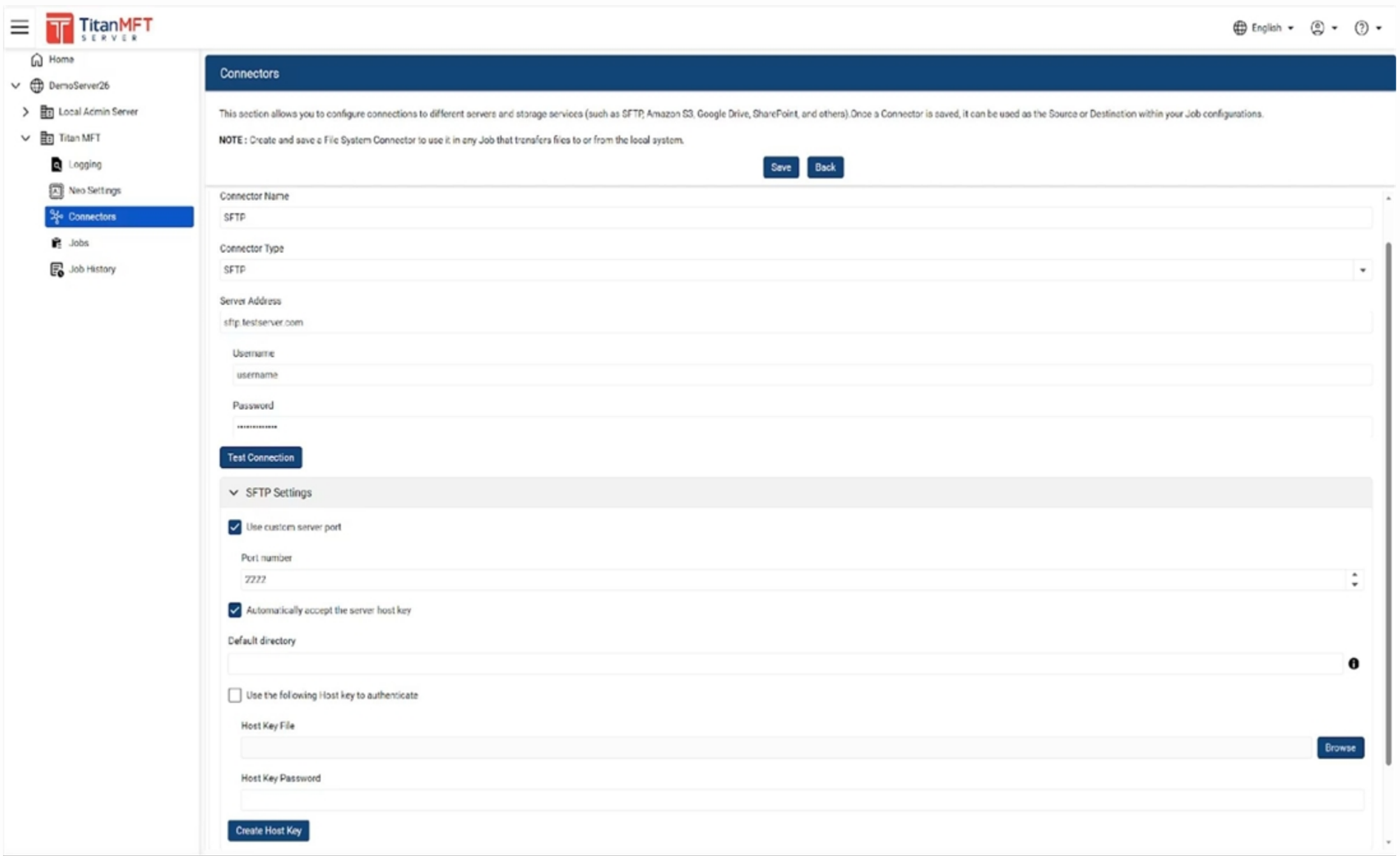
  NOTE: For any transfers that would involve a local File System location (or network path/UNC), ensure to Create and Save a Connector for "File System"

- ***Once Connectors exist in the list, these can now be used for the Jobs in Titan MFT***
  - Select a Connector if wanting to Delete or Export. Choose either option from the right side once a Connector is selected.
  - Also, use the "Actions" options from the right side to Test Connection, Edit Settings, or Delete the Connector

Connector Types

- Use the "**+**" icon to begin adding a Connector

- **Connector Name:** Provide a name for the Connector you create
- **Connector Type:** Select the type of server to which you want to connect
- **File System:** Allows Titan MFT to move files to/from the local File System on the server where MFT is installed
- Choose "**Save**"
    - **SFTP -** For connecting to an SFTP Server



- **FTP -** For connecting to an FTP/FTPS Server
- **Amazon S3 -** For connecting to Amazon S3 Buckets
- **Google Drive -** For connecting to Google Drive
    - *Click login to refresh or change credentials: Use this option to prompt for authentication to the desired Google Drive account, or to change the credentials to a new account*

Jobs: Add, View, and Edit

> **NOTE:** In order for Jobs to work with any external servers, ensure that the proper Connectors have been configured and added to Titan MFT

Creating a Job

Use the "**+**" icon to begin adding a Job

Job Type Select the type of server to which you want to connect

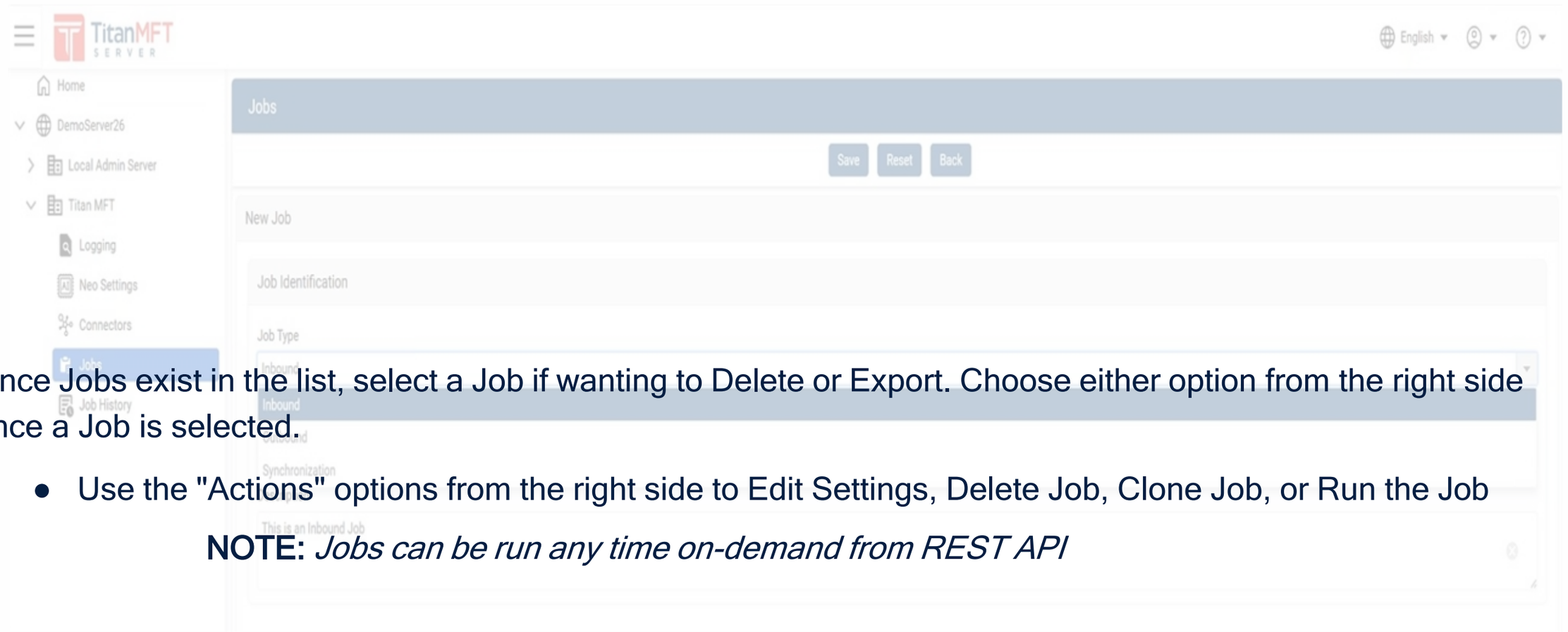
- **Inbound:** Transfer files into the Titan MFT environment
- **Outbound:** Transfer files out from Titan MFT environment

Synchronization: Synchronize data between two locations **Job**

Name Provide a name for the Job you create

Description Provide a friendly description to help identify the Job and what it accomplishes – this shows in the high-view Job List

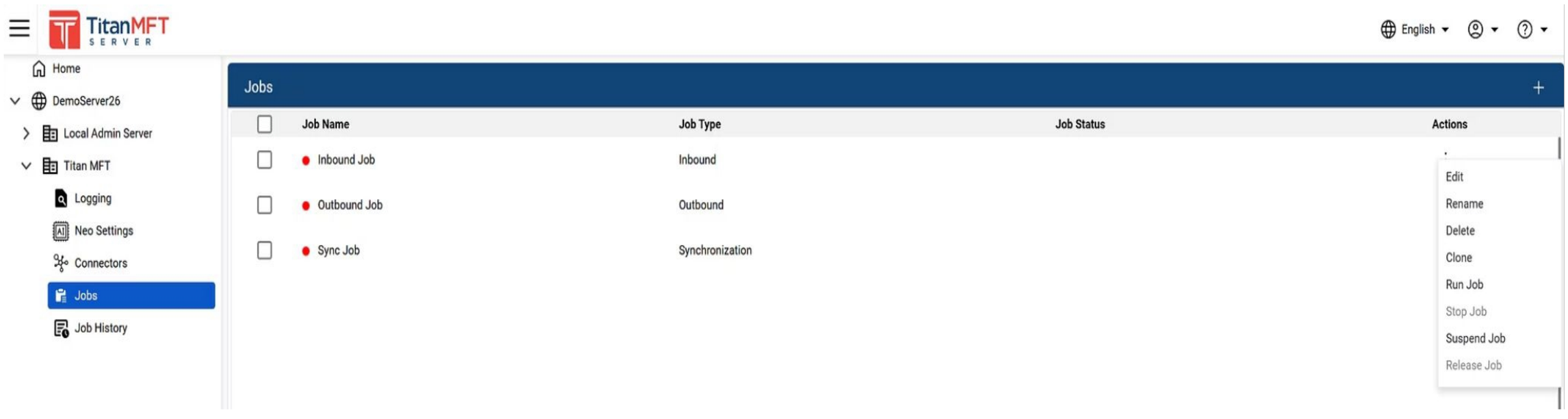
Click "**Save**" to view relevant Job configuration menus



Once Jobs exist in the list, select a Job if wanting to Delete or Export. Choose either option from the right side once a Job is selected.

- Use the "Actions" options from the right side to Edit Settings, Delete Job, Clone Job, or Run the Job

  NOTE: *Jobs can be run any time on-demand from REST API*



Use the dropdown menu items to further define and configure your Job. The menu options and levels of control are extensive and include file filtering and transfer rules, alerts and notifications, pre and post process task execution, scheduling and folder monitoring, encryption/decryption and zip/unzip, and more. **See the Full Admin Guide for details and information regarding the menus of options available**

Job Examples: *Step-by-Step Configurations*

Example 1: Inbound Job

Transfer all files from a folder on an SFTP Server to a folder on the local File System

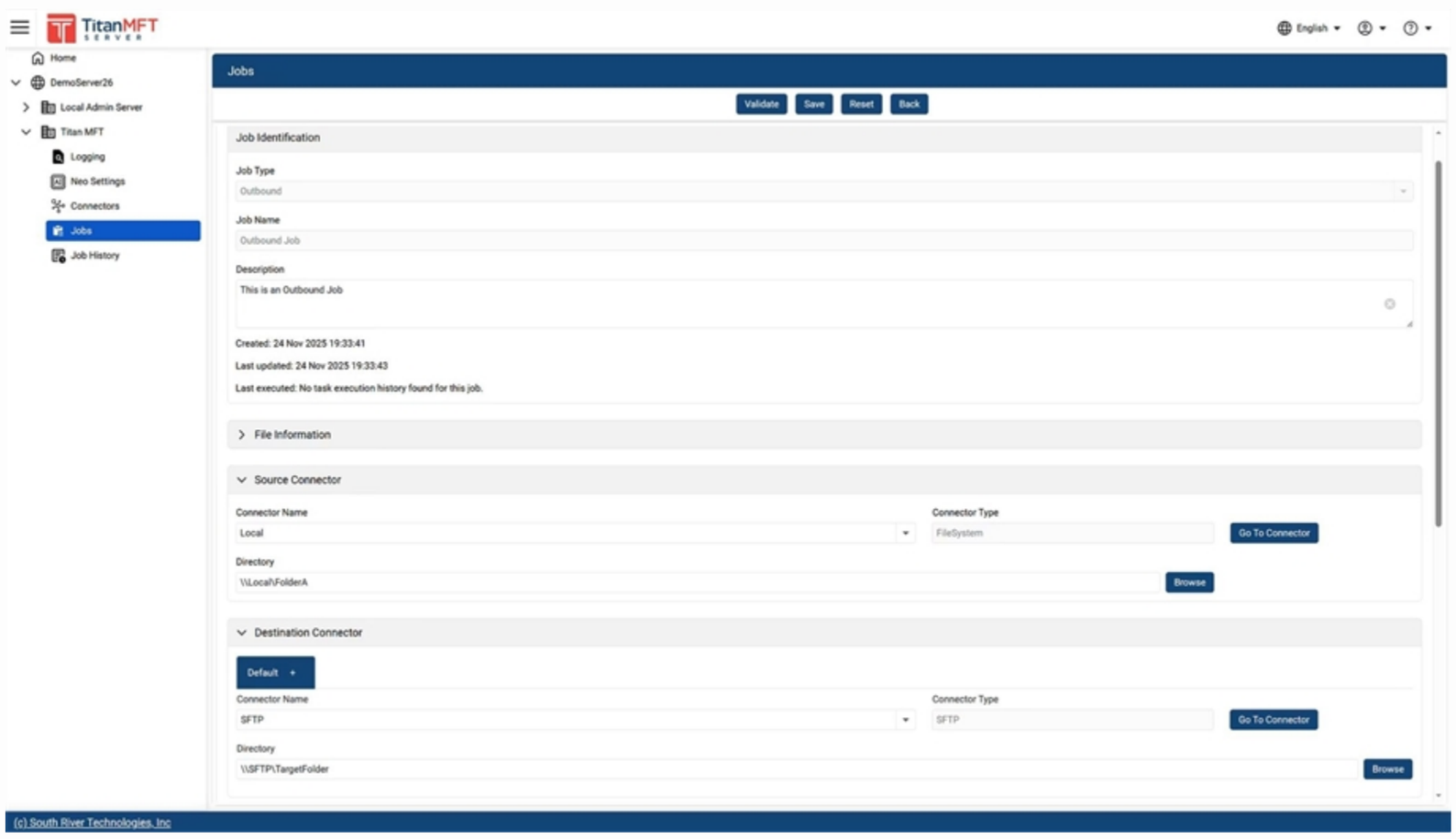
1. Use the "**+**" icon to add a new job, select Inbound from the dropdown list of Job Type, provide a unique name for the Job and any Description. Save.
2. Most menus can remain as set to default
3. **Open the Source Connector** dropdown menu
   a. Select the SFTP server from the Connector Name dropdown
   b. Use "Browse" to select a Directory Path of the Folder of interest from which the data should be transferred
4. **Open the Destination Connector** dropdown menu
   a. Select the Local File System Connector from your dropdown menu
   b. Use "Browse" to select a Directory Path of the Folder of interest to which the data should be transferred
5. Click "**Save**" at the top of the screen to Save the Job
6. **From the Main Jobs list,** select the "Actions" list on the right for the Job you've created and choose to "Run Job"

When choosing to "**Run Job**" from the Actions menu, a status window will be opened. This window can be closed, or it can remain open in order to watch the status of the transfer in real-time. NOTE: Job History section of Titan MFT has a dashboard and high-level view of the Job and its status and past results:

Example 2: Outbound Job

Transfer all files from a folder on the local File System to a folder on an SFTP Server via Scheduled Job

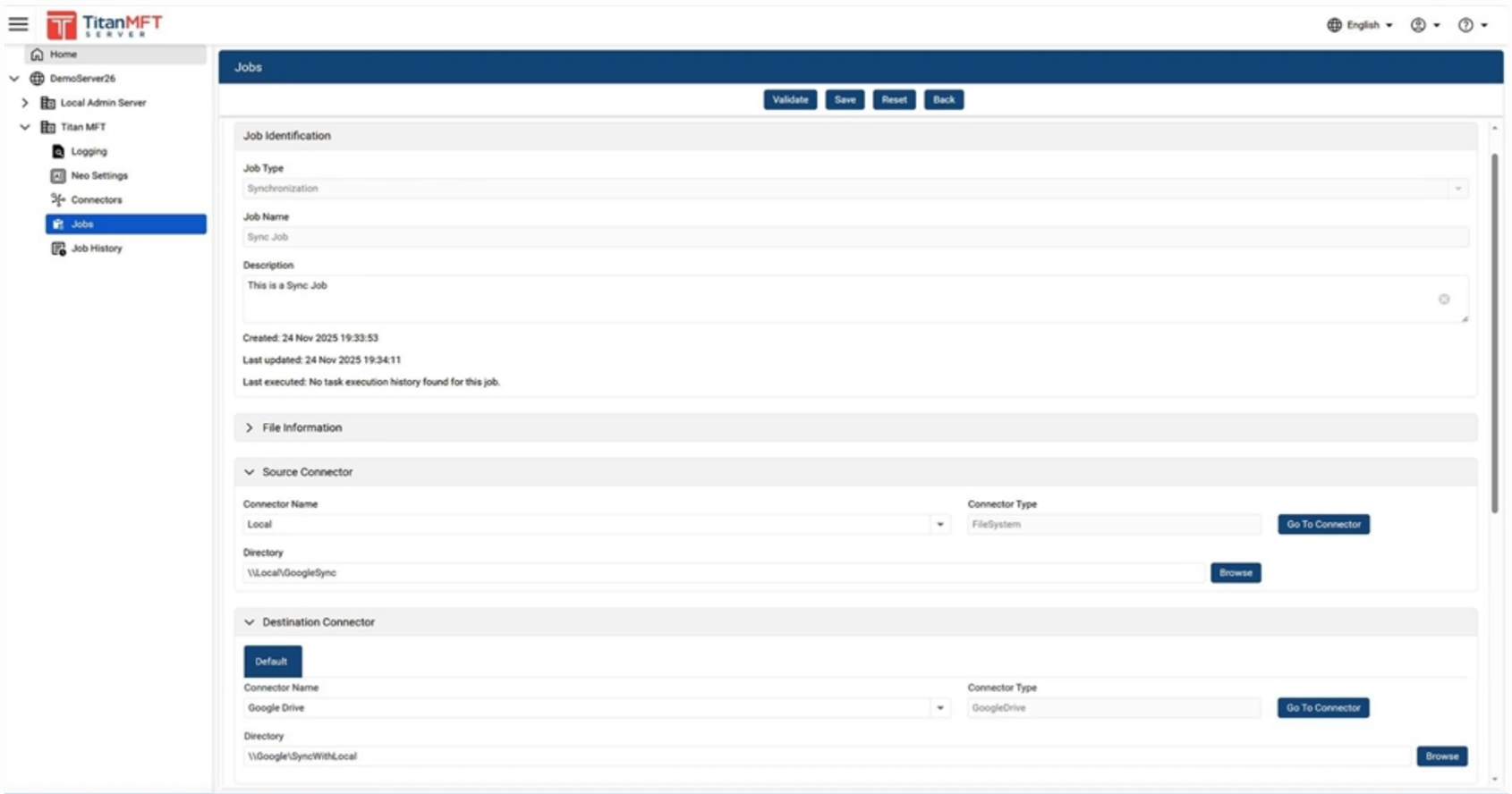
1. Use the "**+**" icon to add a new job, select Outbound from the dropdown list of Job Type, provide a unique name for the Job and any Description. Save.
2. Most menus can remain as set to default
3. **Open the Source Connector** dropdown menu
    a. Select the Local File System Connector from the list
    b. Use "Browse" to select a Directory Path of the Folder of interest from which the data should be transferred
4. **Open the Destination Connector** dropdown menu
    a. Select the SFTP server from the Connector Name dropdown
    b. Use "Browse" to select a Directory Path of the Folder of interest to which the data should be transferred
5. **Open the "Task Execution"** dropdown menu to Schedule the Job
    a. In the "Scheduler" section, open the dropdown for "Run Tasks Using" and select the "Schedule" option
    b. Configure how often the task should run, e.g. every x hours, every x days, etc and choose an Initial Start Date and Time
    c. If wanting to exclude any days, for example, the weekend, select those days from the Exclusions list on the right side
6. Click "**Save**" at the top of the screen to Save the Job
7. From the main Jobs list, select the "Actions" list on the right for the Job you've created and choose to "Run Job" if wanting to run manually; however, because this is a Scheduled Job, simply wait until the scheduled time for the Job to run

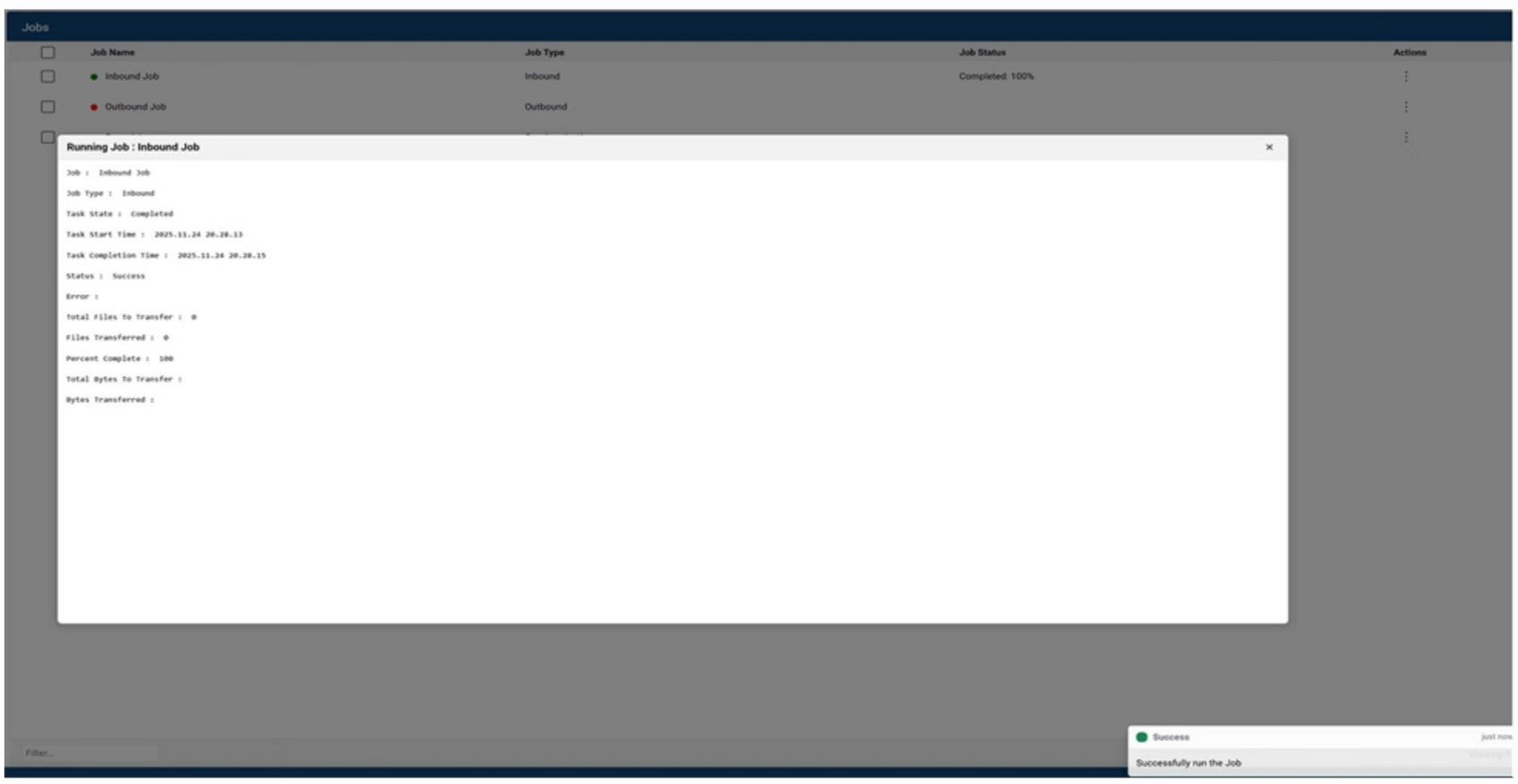


Example 3: Synchronization Job

Sync Files between a folder on the local File System and a folder on a Google Drive Server

1. Use the "**+**" icon to add a new job, select Synchronization from the dropdown list of Job Type, provide a unique name for the Job and any Description. Save.
2. Most menus can remain as set to default
3. **Open the Source Connector** dropdown menu
    1. Select your Google Drive Connector from the list
    2. Use "Browse" to select a Directory Path of the Folder of interest from which the data should be transferred
4. **Open the Destination Connector** dropdown menu
    a. Select your Local File System Connector from the list
    b. Use "Browse" to select a Directory Path of the Folder of interest to which the data should be transferred
5. Click "**Save**" at the top of the screen to Save the Job
6. **From the Main Jobs list**, select the "Actions" list on the right for the Job you've created and choose to "Run Job"





Job History: Monitoring and Management

View a list of Job runs, as well as details regarding Success, Start/End Times, current Status, Errors received, Data Transferred, and when Job runs next

- Use "Page Size" to define number of Jobs per page on-screen
- Use "Enter text to search" to filter the Job History list

Job Name: Name of Job, as named in the "Jobs" menu of Titan MFT

Job Type: Inbound, Outbound, or Sync, as defined in "Jobs" menu

Job History Fields

Task State: Current State (e.g. Completed, Scheduled)

Task Start Time: Date and Time of Job Starting

Task Completion Time: Date and Time of Job Completing

Status: Success or Failed

Error: Any relevant error if the Job failed

Files Transferred: Number of files transferred during the most recent run
Total Files to Transfer: Total number of files to Transfer for the Job **Percent Complete:** Percentage of the Job completed

Next Scheduled: The next day and time the same Job is scheduled to run

Actions

Options available for a particular job

Download: Use this option to download the Job log file

Stop Job: This option is available if a Job is currently running. Use this option to immediately stop the Job