Fly-in: Migrating to Forma Cloud

So you finally decided to **move your existing Forma LMS to Forma Cloud**! We're glad you've chosen our service to host your e-learning platform. To ensure a fast, secure, and seamless migration, we've prepared this guide to help you provide all the necessary information.

Migrating your platform to **FormaCloud** is a structured process that typically takes **2–5 business days**, depending on the size and complexity of your installation.

Here's what will happen during the process:

1. You provide us with the required data
2. You configure the DNS records for SSL certificates and email (SES)
3. You put your platform in maintenance mode
4. We transfer files and databases
5. We upgrade and test installation
6. We validate and attach SSL certificates to our infrastructure
7. We give you the green light to update DNS pointing records
8. You perform final testing

Required Information

To proceed with the migration and activation of your platform, we ask you to send us the following data.

Required Data	**Description**
Platform Name	Used as the project name and as part of the default domain (e.g., `https://[platformname].forma.cloud`).
URL Alias	The web address that will be used to access the platform (e.g., `learning.yourdomain.it`). > **Note**: During the migration process, you will need to configure DNS records in two separate phases. See the **Migration Steps** section below for details.

Required Data	**Description**
Email Sender Address	The email used for notifications, confirmations, and password resets (e.g., `info@yourdomain.it`). It must belong to the same domain as the URL alias.
Superadmin Access to the Platform	An account with superadmin rights to access your current platform.
SSH/FTP Access to the Current Server	Required to transfer files. Include: • Host/Server • Username • Password • Port (22 for SSH, 21 for FTP) SSH transfer protocol is required for safer and faster data transfer, allowing direct transfer and avoiding the risk of data loss or corruption > **Warning**: if only FTP is available, we won't be able to check and guarantee file integrity after the migration to Forma Cloud, and won't take any responsibility for possible data loss or corruption. Please ask your IT or provider for SSH access
Database Access	Host, Username, Password. Alternatively, you may send us the database file directly or provide a download link (e.g., via WeTransfer or similar services).

Sending the Data

You can send us all the required information via email. For maximum security, you may:

- send passwords or credentials in a separate email
- use a secure file-sharing service

Migration Steps

The migration follows a precise sequence. Each step must be completed before moving to the next.

Step 1 — You configure DNS records for SSL certificates and email (SES)

Once we receive your data, we will provide you with a set of DNS records to add to your domain. These records serve two purposes:

- **SSL certificate validation** — required so we can issue and validate an SSL certificate for your alias domain (e.g., `learning.yourdomain.it`) on our infrastructure.
- **Email (SES) authentication** — required so emails sent from your platform (notifications, password resets, etc.) are properly authenticated and not marked as spam. This typically includes DKIM, SPF, and domain verification records.

> **Important**: At this stage, you must only **ADD the new records** we provide. **Do NOT modify or remove any existing DNS records** — your current platform must continue to work normally while we prepare the migration.

> **What you need to do:** Add all the CNAME and TXT records we send you to your domain's DNS configuration. If you're unsure how, ask your IT team or domain provider for assistance.
>
> Check our full **DNS documentation** for further details.

Step 2 — You put your platform in maintenance mode

Once all DNS records from Step 1 have been added and propagated, set your current platform to **maintenance mode**. This ensures that no new data is generated while we transfer your content, guaranteeing an accurate and complete copy.

> **Plan the migration:** to reduce inconvenience for your users, we can agree on specific dates for the intervention based on the availability of our team (during standard business hours, Monday to Friday).

Step 3 — We transfer data and database

With the platform in maintenance mode, our team will:

- Perform a preliminary check of the data you provided
- Transfer all files and the database from your servers to Forma Cloud
- Configure your instance in Forma Cloud

Step 4 — We upgrade and test the installation

After the transfer, our team will:

- Update Forma LMS to the latest available version
- Run technical validation and integrity checks
- Run preliminary functional tests

Step 5 — We validate and attach SSL certificates to our infrastructure

Once the installation is verified, our team will:

- Validate and activate the SSL certificates for your alias domain
- Configure your alias domain on our servers

We will notify you once everything is ready and your instance is live on our infrastructure.

Step 6 — You update DNS pointing records

Once we give you the green light, you need to **modify your existing DNS pointing records** (typically an A record or CNAME) so that your alias domain (e.g., `learning.yourdomain.it`) points to our infrastructure instead of your old server.

> **Important**: Only proceed with this step after receiving explicit confirmation from our team. Changing the pointing records too early will result in downtime for your users.

> **What you need to do: EDIT the existing A or CNAME record** for your alias domain to point to the address we provide. The certificate and SES records you added in Step 1 should remain in place. Check our full **DNS documentation** for the exact values.

Once DNS propagation is complete (usually a few minutes to a few hours), all traffic to your domain will be served by Forma Cloud.

Step 7 — Final testing

After updating the DNS, access your migrated platform and:

- Verify general functionality (login, courses, tracking data)
- Report any issues to our team
- Apply new configurations if needed
- Disable maintenance mode on the migrated platform

> **Important**: Leave maintenance mode **active** on your old installation. This prevents users from accidentally accessing the old server during DNS propagation.

DNS Configuration Summary

Here's a quick reference of the DNS actions required during the migration:

When	Action	Records	Purpose
Step 1 (before migration)	**ADD** new records	CNAME records for SSL certificate validation; TXT/CNAME records for SES (DKIM, SPF, domain verification)	Certificate issuance and email authentication
Step 6 (after our OK)	**EDIT** existing records	A record or CNAME for the alias domain (e.g., `learning.yourdomain.it`)	Point traffic to Forma Cloud

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Security and Data Protection

The security of your data is our priority. During the migration process:

- All data you provide is handled in compliance with the **GDPR**
- Credentials may be sent through secure channels or separate emails
- Data is used **exclusively** for the migration
- After the transfer is complete, credentials can be deleted or changed at your discretion

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Plugins, Custom Modules, and Customizations

If your platform contains custom elements:

- Custom-developed plugins
- External modules
- Custom themes
- Integrations with third-party systems (SSO, API, etc.)

Please inform us when submitting your data. This will allow us to:

- Check compatibility with the new infrastructure
- Make any necessary adjustments or suggest alternatives
- Ensure correct functionality after the migration

> **Important**: We cannot maintain unrecognized plugins or platform customizations, but we will work with you to find the best possible solution to ensure continuity with your current version.

After the Migration

Once the migration is complete and your platform is finally running on Forma Cloud, please keep your previous service active and maintain a backup of your files and database for at least 6 months.

FAQ – Frequently Asked Questions

Will the platform be offline during the migration?

It will be online but closed for user access (Maintenance Mode).

How long does the migration take?

On average, between 2 and 5 business days.

Can the migration be scheduled at specific days?

Yes, let us know and we'll find the most suitable time slot.

What happens if I don't have some of the required data?

We'll help you retrieve it and, if necessary, we can work with backups provided by you.

Will my data be deleted from the previous server?

No, unless you remove it manually. We copy the data; we do not delete it.

What happens with the login and tracking data of my users and courses?

Nothing! After the migration, your users will be able to log in again with the same credentials, all tracking data will be retained, and all your courses and their configurations will be maintained, compatible with the version of Forma implemented.

When should I change my DNS records?

DNS changes happen in two phases. **Before the migration**, you add the certificate and email (SES) records we provide — these don't affect your current platform. **After the migration**, once we confirm everything is ready, you update the pointing records (A or CNAME) so your domain points to Forma Cloud. Never change the pointing records before receiving our explicit confirmation.

How long does DNS propagation take?

Usually between a few minutes and a few hours, depending on your DNS provider and TTL settings. During this time, some users may still reach the old server — that's why we recommend leaving maintenance mode active on the old installation.

Support

If you have questions or difficulty retrieving the required information, our team is here to help.

Don't hesitate to contact us!

Revision #22
Created 2025-11-18 11:18:53 UTC by Alberto Pastorelli
Updated 2026-07-16 08:03:29 UTC by Alberto Pastorelli