

**Cleo Clarify™**

# Upgrade Guide

**Version 5 to Version 6**

Steps & Requirements





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## 1. Overview

This guide outlines the process of upgrading from Cleo Clarify 5.x to Cleo Clarify 6.x.

The transition introduces a bring-your-own-database model (PostgreSQL 13–16) and gives you the opportunity to modernize your integration projects for improved performance and support. Cleo Clarify™ 6 continues to support both single-server and clustered deployments, just as previous versions did.

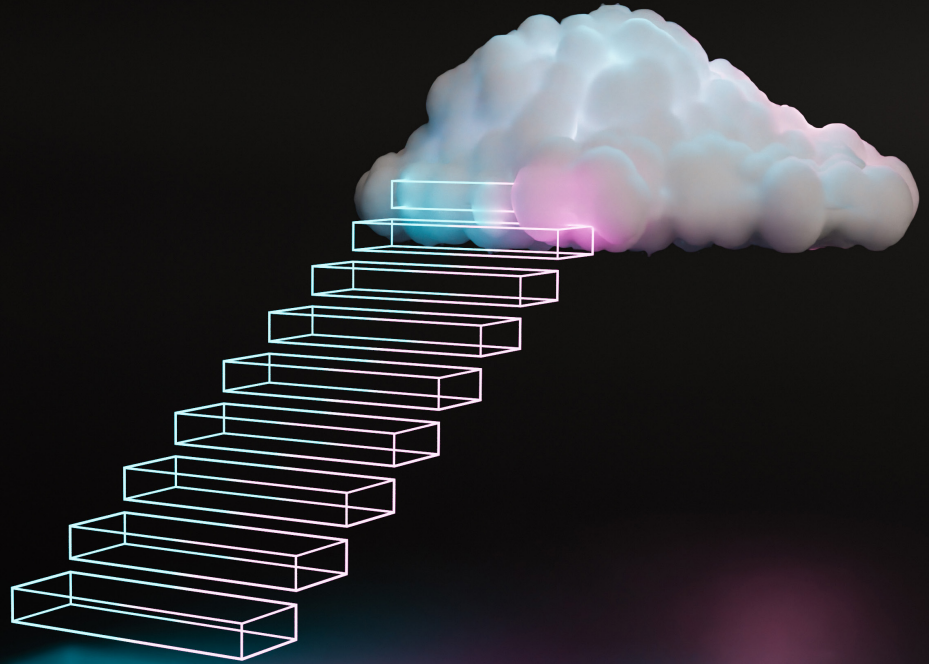
Provision new hardware for Cleo Clarify 6 to run in parallel with your existing 5.x environment. This ensures that your production environment continues to run uninterrupted while the new environment is stood up, validated, and tested.



## 2. Prerequisites

Requirement	Recommendation
Backups	Full database dump of Cleo Clarify 4 and a copy of all relevant installation directories. Dump can be done via Database Client or <a href="#">built-in database backup script</a> found in <code>\&lt;Server Install&gt;\utils\</code> . File System backups can be done using your OS or tool of choice.
Source control	Ensure the latest issue-free production projects are committed to your SVN repository. This is critical to ensure you're starting Cleo Clarify 6 with no existing problems.
Hardware	Provision new machines for Cleo Clarify 6. If Cleo Clarify Single Server, we recommend two machines, one for the database and one for the server application. If cluster, the number of machines will depend on the number of nodes being configured, plus an additional one for the database. Required ports (HTTPS, PostgreSQL, cluster messaging) are listed in the <i>Cleo Clarify 6 Getting Started Guide</i> .
CPU & RAM	Start with current Cleo Clarify 5.x sizing. Add CPU cores for the biggest efficiency gain; add RAM (16 GB + per app host) if needed.
OS & JDK	Cleo Clarify 6 bundles its own OpenJDK 8u and no separate Java install, or configuration is required. Confirm your OS is listed in the Cleo Clarify 6 Support Matrix. <ul style="list-style-type: none"> <li>• RHEL 8/9</li> <li>• Windows 2019/2022/2025</li> </ul>
Database	Obtain and install version PostgreSQL 13–16 (v16 recommended). Cleo Clarify 6 does not ship with a database; you will install and tune it based on recommendations in the <i>Cleo Clarify Getting Started Guide</i> .
Cleo Clarify 6 license	Ensure you have your Cleo Clarify 6 license file (license.txt) ready prior to installation.

## 3. Upgrade Phases



### Phase A – Prepare

#### Back up Cleo Clarify™ 5.x

- Create a full database dump with `pg_dump` or `backup_db.bat` found at `<Server Install>\utils\backup_db.bat`
- With server suspended and shutdown, copy contents of installation directories (integration workspace, runtime\_workspace, server) using OS functionality or tool of choice.

#### Commit projects to SVN

- In Cleo Clarify Studio 4, commit all dev and production workspaces and create a tag in the SVN repository (e.g., Plan.io)
  - » For example: “clarify5-production”, “clarify5-stage”).

### Phase B – Build the Cleo Clarify™ 6 Environment

#### Provision new servers based on your architecture decision:

- 1 server (single-server option) + 1 machine for PostgreSQL database, or
- 3 servers for Cleo Clarify 6 + 1 for PostgreSQL (clustered setup)  
Studio can run on your existing development workstation. Consider increasing memory and CPU allocations during this phase.

#### Install PostgreSQL

- Cleo Clarify 6 requires a user-managed PostgreSQL instance. Cleo recommends PostgreSQL v16. PostgreSQL Documentation will guide you through installation and the necessary database configurations.

## Install Cleo Clarify™ 6

- Run the installer in cluster or single-server mode.
- Point the configuration to the new PostgreSQL instance.
- Apply your Cleo Clarify 6 license file to the Server directory.

## Phase C – Migrate Projects

\*Cleo Clarify 5 projects typically import with fewer Problems-tab errors than 4.x projects. Most objects are already Version 2, so cleanup is often quick.\*

- *Check Out* projects from your SVN Repository or Import projects from file system into Studio 6.
- Use the “Clean” and “Update Configurations” options in Studio. This restructures legacy projects to be compatible with Cleo Clarify 6. Expect some errors in the Problems tab during this step. Work through them and open a support ticket if needed.
  - **Note:** Some objects may have to be recreated.
- Review the Problems tab in Cleo Clarify Studio to resolve any errors and ensure the workspace is clean before continuing.
  - **Optional** – Consider Upgrade objects to Version 2
- Cleo Clarify 6 supports upgraded object types (Schemas, Rulesets, Database Adapters, Ruleset Actions, Tasks).
- Upgrading to Version 2 is optional but recommended. Benefits include improved performance, faster bug fixes, and access to future enhancements.
- You can perform the upgrade now or incrementally post-migration.

## Phase D – Validate and Cut Over

Plan a production outage window and code freeze 24h before cut-over.

### Deploy to Stage

- Deploy the upgraded projects to a staging environment. Perform functionality testing, integration validation, and load testing. Confirm the environment can support your business’s volume and complexity. Establish cut over timeframe for 5.x to 6.x.

### Go live in Production

- Once Stage is validated, promote the tested packages into your production environment. Monitor logs, queues, and database health to confirm successful operation.

### Maintain the 5.x Environment

- Leave Cleo Clarify 5.x services powered on (but isolated) for quick rollback or data reference.
- Do **not** delete its database or runtime directories until Cleo Clarify 6 has been in production for at least one full business cycle.

## 4. Rollback Plan (if needed)

- Stop all Cleo Clarify™ 6 application services (and schedulers, if clustered).
  - Start Cleo Clarify 5.x services.
  - If any inbound endpoints (API URLs, database connections, SFTP shares, SMB mounts) were redirected to Cleo Clarify 6, switch them back to the Cleo Clarify 5.x host or VIP, then verify traffic flow.
  - Verify message flows and monitor logs to confirm production stability.
- i** *Tip: Rehearse these steps in a non-production environment so the team can execute them quickly if needed.*

## 5. Support Options

This migration can be completed using Cleo documentation, or you can engage Cleo Professional Services for support. Services can manage the full migration or assist with specific phases (like PostgreSQL setup, clustering, or object upgrades). Your account manager or CSM can help scope the right approach.

## 6. Resources

- a. Cleo Clarify Support Center
  - i. Cleo Clarify 6 installation guides
  - ii. Cleo Clarify 6 release notes
  - iii. Troubleshooting articles
- b. Support email: [support@cleo.com](mailto:support@cleo.com)
- c. Product inquiries: [products@cleo.com](mailto:products@cleo.com)
- d. Engage Services: Contact your Account Manager or Customer Success Manager

## About Cleo Integration Cloud

**Cleo Integration Cloud (CIC)** is a cloud-based integration platform, purpose-built to design, build, operate, and optimize critical ecosystem integration processes. The CIC platform brings end-to-end integration visibility across API, MFT, EDI, and non-EDI integrations, giving technical and business users the confidence to rapidly onboard trading partners, enable integration between applications, and accelerate revenue-generating business processes. On the platform, businesses have the choice of self-service, managed services, or a blended approach – ensuring complete flexibility and control over their B2B integration strategy.