

Cleo Clarify 6.x

Technical FAQ

CLEO INTEGRATION CLOUD (CIC): PRIVATE CLOUD EDITION

1. What is Cleo Clarify 6.x?

Cleo Clarify 6.x is the latest generally available major release of the Clarify integration platform. It delivers significant security enhancements, expanded operating system support, a modernized Studio user interface, new and updated connectors, and numerous bug fixes and performance improvements over previous versions.

2. What is included in the Clarify 6.x release package?

The Clarify 6.x GA release includes:

- Studio installer (Windows and macOS)
- Single Server and Cluster installers (Windows and Linux)
- User Guide documentation
- Migration documentation for upgrading from 4.x to 6.x and from 5.x to 6.x

3. Can I upgrade directly from Clarify 4.x to 6.x?

Yes. A direct upgrade path from Clarify 4.x to 6.x is supported. Please refer to the migration guide included in the release package for full step-by-step instructions.

4. How do I upgrade from Clarify 5.x to 6.x?

Cleo recommends fully migrating and testing all projects in Stage and Production before cutting over. The upgrade process consists of eight steps:

- Back up your 5.x database and file system directories.
- Commit your latest projects to an SVN repository.
- Provision new hardware for Clarify 6.
- Obtain a PostgreSQL database (versions 13–16 supported; v16.x recommended).
- Install Clarify 6.x as a Cluster or Single Server.
- Check out your 5.x Studio projects into 6.x Studio workspace and clean them.
- Optionally upgrade to Version 2 objects where possible for performance benefits.
- Deploy and test in Stage and Production environments.

5. Is professional services assistance required for the upgrade?

No. Migration to Clarify 6.x can be completed as a self-service effort. Cleo Professional Services is also available as a paid option for customers who prefer guided assistance. Both paths are fully supported.

6. What database does Clarify 6.x require?

Clarify 6.x requires a PostgreSQL database. Versions 13 through 16 are supported, and Cleo recommends PostgreSQL v16.x. Customers are responsible for providing and managing their own PostgreSQL instance.

7. For a Server Cluster, does every node need to be licensed separately?

No. For a Server Cluster, only one node needs to have the license applied. The license covers the entire cluster. For a Single Server environment, the license must be applied to each individual server installation.

8. Can Clarify 6.x be installed on cloud-hosted virtual machines?

Yes. Clarify 6.x can be installed on cloud-hosted VMs; however, you must ensure that connection latency is minimal between the application and all locations it needs to reach. For cluster deployments, low-latency networking between cluster nodes and the database is critical – they should ideally behave as if they are on the same local network. Communication failures among cluster nodes, shared storage, and the database can cause stability issues. Failure to meet these connectivity requirements may result in degraded performance or instability.

9. How many nodes does a Server Cluster require, and is there a specific configuration requirement?

A Clarify Server Cluster requires a minimum of three nodes and must always be configured in an odd-numbered count – for example, 3, 5, or 7 nodes. This odd-numbered configuration is required to support distributed server architecture, multi-queue capability, configurable load balancing, and process prioritization.

10. Do all nodes in a Server Cluster need to run the same operating system?

Yes. All machines in a Server Cluster must run the same operating system and version. Mixed-OS cluster configurations are not supported.

11. What ports does Clarify use, and can they be changed?

Default port settings for both Single Server and Cluster deployments are documented in the Cleo Solution Center. Please refer to: <https://support.cleo.com/hc/en-us/articles/360033937814-Port-Settings>

12. Are there any pre-installation environment steps I should be aware of before installing Clarify?

Yes, there are a few important environment requirements to address before installing:

- Virus protection software must be disabled or turned off for the Clarify installation directories. Running antivirus over these directories can interfere with server operation.
- On Windows, default power save settings for network adapters should be disabled on all cluster machines. These settings can cause network adapters to shut down, which will interrupt cluster performance.

- Firewall(s) must be turned off or the required ports opened before installation.
- The Clarify Server should be run under a domain user account with appropriate administrative privileges.

13. Is Clarify 6.x compatible with Cleo Harmony?

Yes. Clarify 6.x is compatible with Cleo Harmony through version 6.x (v5.8.1.9). Cleo recommends running the latest available version of Harmony 6.x to ensure full compatibility.

14. Does Clarify 6.x maintain compatibility with Dashboards?

Yes. Dashboard compatibility is maintained in Clarify 6.x. To enable connectivity, a certificate update script must be run on the Clarify server. On Windows, run `update-certs.ps1`. On Linux, run `update-certs.bat`. This only needs to be run once as part of the setup process.

15. Does the Email Receive Monitor support modern authentication such as OAuth?

Yes. The Email Receive Monitor supports OAuth authentication, which is important for Office 365 users as Microsoft is decommissioning Basic Authentication (username and password) for Outlook accounts. For setup instructions, refer to: <https://support.cleo.com/hc/en-us/articles/14327416702999-Email-OAuth-Support>

16. Does Log Warehouse still work in Clarify 6.x?

Yes. Log Warehouse functionality is supported in Clarify 6.x. Please refer to the Getting Started Guide for configuration and usage details.

17. How do software updates work, and is there any downtime involved?

Software updates are applied through the Studio's Admin Console. Before applying any update, Cleo recommends suspending the server and allowing all running processes to complete, committing all projects to SVN, backing up the server installation directory, and temporarily pausing any external notifications being sent into Clarify. The server will automatically shut down once updates have been installed and must be manually restarted afterward. Plan updates during a maintenance window to minimize impact.

18. What are the backup and restore options in Clarify 6.x?

Clarify provides a database offline backup tool located within the installation directory. Full backup and restore instructions can be found in the Getting Started Guide. It is important to back up both the database and the file system at the same time to ensure continuity between the two. As a best practice, Cleo strongly recommends running backup tools with the application suspended and shut down. Running backups while the application is active risks file corruption.

19. After installation, how do I make sure my server is processing the correct number of concurrent jobs?

For both Single Server and Server Cluster deployments, the number of concurrent processes must be configured to match your license. The Single Server ships with a default of 5 concurrent processes regardless of what is licensed. After completing installation and licensing, update the `ebi.akka.numWorkers` property in the `node.properties` file on each node to reflect your licensed worker count. For a Server

Cluster, the number of Server Nodes, Active Servers, and Concurrent Processes is also specified during the installation process and should align with your licensing agreement. If you need to adjust these settings post-install, contact Support. A server restart is required after any changes to node.properties.

20. How can I improve Clarify's processing performance?

Clarify scales with your hardware. You can allocate more RAM for the server to use during transformations by modifying the XMS value in the ClarifyServer_Standard.ini file in your server installation directory – set it to your desired allocation in MB. Using the SendEventNotification task in targeted areas can also help by giving specific document types dedicated resources within a queue. To determine the right number of workers for your hardware, use this formula: Maximum active processes per node = $(2 \times \text{total CPU cores}) - 1$. Ensure your hardware has sufficient resources to support the worker count you have configured.

21. Why do processes sometimes get stuck, and how should I troubleshoot them?

Processes can become stuck for a number of reasons, including communication lapses between Clarify and its PostgreSQL database, communication lapses between Clarify and an on-premises database, insufficient server resources, or running on unsupported hardware or OS. Start by confirming your local network infrastructure is stable, checking for CPU and memory constraints, and verifying that your hardware and OS are on the supported list. If the issue persists after these checks, open a support ticket and include the timeframe of the error, relevant Auditor logs, and the full server logs for that period.

22. Should I convert my integration objects to Version 2?

Yes, converting to Version 2 objects is strongly recommended wherever possible. Version 2 objects include optimizations for faster throughput and will continue to receive feature enhancements and bug fixes. Failing to convert may result in slower processing times for integrations and jobs.

23. Can I simply upgrade Version 1 rulesets, schemas, and adapters to Version 2 in place?

No. Clarify objects that need to be converted from Version 1 to Version 2 must be rebuilt from scratch. The functionality differences between versions are not one-to-one, meaning new logic may be required to maintain parity with your existing integration patterns. Plan accordingly and allow sufficient time for testing when undertaking this conversion.

24. Are there any features from Clarify 5.x not available in Clarify 6.x?

At the time of the GA release, High Availability (HA) PostgreSQL configuration is not yet supported. Cleo plans to add this capability in the near future. In the meantime, customers should review available backup and continuity strategies. For information on establishing and maintaining a PostgreSQL backup strategy, please refer to: <https://www.postgresql.org/docs/current/backup.html>

25. How do I configure TLS settings for web services in Clarify?

TLS settings for web services are controlled by the SSLConfig.properties file, located in your installation at <Clarify share>\resources\config\server\misc. To change the TLS version used for web services, modify the ssl.protocol.webservice parameter in that file.

26. Can I connect external reporting or visibility tools directly to the Clarify database?

Yes, but with an important caveat. Clarify ships with preconfigured database views that expose detailed information about your transformation processes. Cleo strongly recommends using these views rather than querying the underlying tables directly – direct table interaction risks database corruption. Contact Cleo Support for guidance on which views are available and how to leverage them for your reporting or visibility use case.

27. How do I get help or report issues?

Contact Cleo Support through the standard support channels. When submitting a ticket, provide complete details including your environment information, server and Studio logs, PostgreSQL logs, and screenshots or screen recordings for any UI-related issues. You can also reach Support directly at support@cleo.com or through the Cleo Solution Center.

Additional Resources

For documentation, release notes, and installer downloads, visit the Cleo Solution Center or your account portal.

For support inquiries, contact support@cleo.com or visit support.cleo.com

Contact Cleo

Today