

TRANSITIONING

FROM

CLEO CLARIFY 4.X



CLEO INTEGRATION CLOUD

Empowering customers through self-service migration





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About this guide

Welcome to our self-service guide for migrating from on-premises Cleo Clarify to Cleo Integration Cloud (CIC).

A Self-Service Guide to Transitioning from Cleo Clarify 4.x to Cleo Integration Cloud



Who is this guide for?

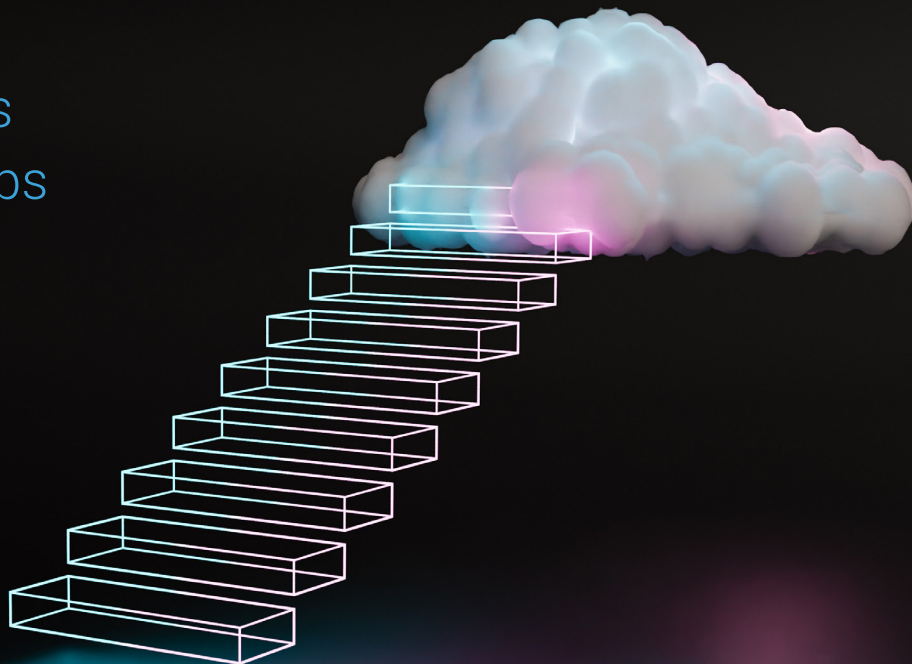
With this document, self-service Cleo Clarify customers like you have the power to navigate and execute the migration process independently, empowering your team to transition your projects from on-premise Cleo Clarify servers to our modern, cloud-based platform, Cleo Integration Cloud.

Why use this guide?

This document provides comprehensive step-by-step instructions to guide you through restructuring your projects for cloud compatibility, ensuring enhanced scalability, flexibility, and advanced features along the way.

Dive into key considerations, best practices, and recommended approaches to facilitate a seamless transition, all while addressing common challenges encountered during migration. From adapting existing project designs and logic to align with CIC standards to understanding the intricacies of your current Cleo Clarify setup, this guide equips you with the knowledge and tools needed for a successful migration journey.

Migration Process Overview and Steps



1. Segregate Business Processes according to CIC Best Practices:

- a. Separate inbound and outbound processes, which involves separating inbound and outbound business processes by document type.
- b. Example workspace of Business Processes not properly segregated:

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* Core204ByLoadLaunch_BPS.bps 131 08/09/
* Core204ByLoadTransformation_BPS.bps 131
* Core204ByLoad_DARS.ruleset 131 08/09/23,
* Core846Launch_BPS.bps 131 08/09/23, 2:34
* Core846Transformation_BPS.bps 131 08/09/
* Core846WithLIPLaunch_BPS.bps 131 08/09/
* Core846WithLIP_DARS.ruleset 131 08/09/23,
* Core846_DARS.ruleset 131 08/09/23, 2:34 AM
* Core852Launch_BPS.bps 131 08/09/23, 2:34
* Core852Transformation_BPS.bps 131 08/09/
* Core852_DARS.ruleset 131 08/09/23, 2:34 AM
* Core856Transformation_BPS.bps 131 08/09/
* Core856_DARS.ruleset 131 08/09/23, 2:34 AM
* Core856launch_BPS.bps 131 08/09/23, 2:34
* Core870Transformation_BPS.bps 131 08/09/
* Core870_DARS.ruleset 131 08/09/23, 2:34 AM
* Core870launch_BPS.bps 131 08/09/23, 2:34
* Core944PALLaunch_BPS.bps 131 08/09/23,
* Core944PALTransformation_BPS.bps 131 08
* Core944PAL_DARS.ruleset 131 08/09/23, 2:3
* Core944Transformation_BPS.bps 131 08/09/
* Core944_DARS.ruleset 131 08/09/23, 2:34 AM
* Core944launch_BPS.bps 131 08/09/23, 2:34
* Core945Launch_BPS.bps 131 08/09/23, 2:34
* Core945Transformation_BPS.bps 131 08/09/
* Core945_DARS.ruleset 131 08/09/23, 2:34 AM
* Core947Launch_BPS.bps 131 08/09/23, 2:34
* Core947Transformation_BPS.bps 131 08/09/
* Core947_DARS.ruleset 131 08/09/23, 2:34 AM

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2. Analysis, Assessment and Planning:

- a. Evaluate existing Clarify integration architecture, including dependencies, data sources, and integration points.
- b. Understand current Clarify setup, functionalities, and customizations.
- c. Take inventory of what objects in the workspace are Version 1 versus Version 2.
- d. Create a detailed planning and design document for the new cloud architecture, considering:
 - i. Inbound and outbound flow processes
 - ii. Error handling mechanisms
 - iii. External database connections
 - iv. Presence of nested business processes
 - v. Migration of scripts running in the customer system

3. Integration Project Migration:

- a. Refactor or repackage applications for cloud compatibility.
- b. Rename projects, packages, and objects appropriately.
- c. Identify and replace outdated capabilities with their cloud equivalents.
 - i. For example, a File Monitor would be replaced by a Data Flow and configuring a specific event to be launched in the Transformation endpoint.
 - ii. Another example would be substituting File Adapters with CIC Studio's Cloud Adapters.

4. CIC Cockpit Project Additions:

- a. Add CIC Cockpit functionality to cloud projects, which is not present in Clarify projects.
- b. Attach and configure CIC Cockpit projects for both EDI and non-EDI trading partners to ensure proper visibility in CIC Cockpit of Messages and Jobs and other important functionality.
- c. For more information, see the following Solution Center article that describes the process of obtaining CIC Cockpit projects and related articles of how they're used.

<https://support.cleo.com/hc/en-us/articles/360048655494-Obtaining-the-CIC-Cockpit-Projects-CCP>

5. Testing redesigned integrations in CIC:

- a. Conduct comprehensive testing, including functional, regression, user acceptance, and load testing within a Stage environment.
- b. Identify customers with large data loads and multiple database connections early to plan and design projects accordingly.

6. Integration Project Performance Optimization:

- a. Optimize configurations for improved cloud performance.
 - i. For example, a business process with database interaction could run for 3 minutes on Clarify since the database is within the local network. If proper optimization is not done in CIC that includes the use of an Access Point, then the Business Process will take longer in comparison to complete.
- b. Monitor and fine-tune resource usage and scalability.
- c. Gather feedback from Support for further performance enhancements, especially if there are performance disparities between Clarify and CIC environments.

7. Possible Infrastructure Adjustments to Meet Requirements:

- a. Once performance optimizations are made at the integration project level, engagement may be needed with Cleo to adjust resources.
 - i. Resources may have to be modified to accommodate current and future volume, file size and business requirement timeframes.
- b. This may involve the addition of extra Active Processes, processing memory or deployment memory.

8. User/Personnel Training and Documentation:

- a. Gain access to Cleo Solution Center's knowledgebase to familiarize applicable personnel with changes between Clarify and CIC and overall feature set of CIC.
- b. Leverage Training/Learning for deeper explanations and context of CIC's capabilities.

<https://support.cleo.com/hc/en-us/categories/360002141853-Training>

9. Production Deployment:

- a. Execute the migration plan by proceeding to deploy tested and validated projects to CIC.
- b. Monitor for any issues during the transition.

10. Post-Migration Validation:

- a. Verify integration functionality in the cloud.
- b. Contact support@cleo.com for inquiries or assistance with problematic behavior.



Additional Considerations During Migration Process

1. Object Version Conversion:

- a. To reap the benefits of receiving feature enhancements and bug fixes, converting Clarify objects from Version 1 to Version 2 is strongly encouraged.
- b. Version 2 objects have optimizations for faster throughput.
- c. Failing to convert versioning where able may result in slower throughput times for processes and jobs.

2. Double-check batch processing requirements:

- a. Some users prefer to run transformations as needed throughout the day and only send completed payload batches to customers at scheduled intervals. While this use case may be acceptable when utilizing customer-provided storage to temporarily stage data before transmission, it's important to note that CIC lacks the necessary storage infrastructure for such operations unless utilizing a Partner Mailbox.
- b. Contact Support if assistance is needed in this area.

3. Increased Processing Time:

- a. Post-migration, processes may take longer to complete compared to on-premises Clarify servers.
- b. Often, this is due to the inherent connectivity latency between file systems and CIC's architecture as well as database connection traversal from CIC's infrastructure to local database systems.
- c. If assistance is needed in this area, please contact support, or assigned Customer Success Manager/ Account Executive.

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.