

# ***Cleo* Harmony<sup>TM</sup>**

## **Installation and Configuration Guide**

**Version 5.4.1**



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# Contents

<b>1 About Cleo Harmony, Cleo VLTrader, and Cleo LexiCom.....</b>	<b>4</b>
Cleo Technical Support.....	4
<b>2 Cleo Harmony system requirements and recommendations.....</b>	<b>5</b>
<b>3 Installing and configuring Cleo Harmony.....</b>	<b>6</b>
Downloading the installer.....	6
Running the installer.....	6
Running the Cleo Harmony installer for Windows.....	6
Running the Cleo Harmony installer for Linux/Unix.....	6
Post-installation configuration.....	7
Registering your serial number.....	7
Configure your firewall.....	7
<b>4 Test your installation.....</b>	<b>9</b>
<b>5 Optional configuration.....</b>	<b>10</b>
Customizing your admin UI login page splash image.....	10
Naming your installation.....	10
Customizing Cleo Portal login page graphics.....	10
<b>6 Uninstalling your Cleo software.....</b>	<b>11</b>

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# 1

## About Cleo Harmony, Cleo VLTrader, and Cleo LexiCom

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VersaLex software is the platform that powers the Cleo family of Secure Data Integration (SDI) products—the Cleo LexiCom® application is a desktop-based client solution for communication with major trading networks. The Cleo VLTrader® application is a server-level solution designed to meet the needs of mid-enterprise organizations. The Cleo Harmony® application is tailored for large enterprise needs.

### Cleo Technical Support

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Standard Cleo Technical Support is available from 7am - 7pm CST, Monday through Friday. Support availability might differ depending on your support package.

Training and a support subscription are required to work with a Cleo technical support analyst for all products, except Cleo LexiCom.

When contacting the Cleo support team, have your contact information, the name of product you are calling about, and your serial number, if available. During the support process we may request additional information (for example, a support bundle) that will vary depending on the type of request or issue.

Requests are handled on a callback basis in the order they are received. The Cleo support answering service or web form will collect your information and your request will be placed in our callback queue.

To contact Cleo Technical Support:

- Use the request form at: <http://www.cleo.com/support/request.php>.
- Call us:
  - 1-815-282-7894
  - US (toll free): 1-866-444-CLEO(2536)
  - UK: 02038653439

# 2

## Cleo Harmony system requirements and recommendations

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Your system must meet certain minimum hardware and software requirements to install and run Cleo Harmony software. Your particular hardware and software needs might vary depending on your operating system and the number of simultaneous connections you expect.

For more information, visit <http://www.cleo.com/support/byproduct/harmony/sysreqs.php>.

Here are some additional recommendations for your system configuration:

- The server should have a static IP address.
- If the server is behind a firewall, appropriate IP addresses and ports must be open based on Cleo Harmony configuration. Only port 5080 is enabled by default and must be open inbound on your firewall to allow access to the web admin UI from outside the firewall (although if using Cleo VLProxy, it offers an alternative to opening inbound ports). All other ports must be explicitly opened from within the product after installation. See [Configure your firewall](#) on page 7.
- To ensure optimal performance, the Cleo Harmony product should be run on a dedicated server. For example, Cleo Harmony software should not be run on the same server as a Web Server.
- For Cleo Harmony administration and the corresponding Cleo VLNavigator application, a User Interface (UI) is required, whether the native OS GUI or the web-based UI.
- **For Windows:** The Cleo Harmony software is installed as a Windows service. By default, Windows services run under a local system account and do not see mapped network drives. If you must access a network drive through the Cleo Harmony product, there are several options:
  - Activate an SMB host connection within the product and use URI smb: paths.
  - Use full network path names (UNC paths) and either provide the credentials through Windows/Unix Folders configuration within the product or change the account running the service to one that can access the network drive.
- **For Linux/Unix:** The Cleo Harmony software must be run as a daemon. For information about setting up Cleo Harmony software as a daemon, see *Run as a Unix Daemon* in the Cleo Harmony User Guide.

# 3

## Installing and configuring Cleo Harmony

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Installing your Cleo software requires that you download and run the installer, and then perform certain tasks depending on which configuration you want.

### Downloading the installer

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Before you can use the Cleo Harmony software, you must download the installer file to your system.

- Open the email you received from Cleo, and click the download link. The compressed installation file is downloaded to your local system.

Continue with running the installer.

### Running the installer

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The downloaded installer comes bundled with a Java Runtime Environment (JRE), so Java should not need to be installed on the operating system prior to installing Cleo Harmony and Cleo Harmony will not interfere with other versions of Java that may already be installed on the system.



**Note:** On both Linux/Unix and Windows, you can run the installer strictly in command line mode by adding `-i console` arguments when you run the installer. For example, on a Linux system:

```
./install.bin -i console
```

### Running the Cleo Harmony installer for Windows

- The Cleo Harmony installation program is named `install.exe`. Go to the directory where the installer file resides, double-click `install.exe`, and follow on-screen instructions to complete installation.

### Running the Cleo Harmony installer for Linux/Unix

1. Navigate to the directory where the `install.bin` resides.
2. Add the execute permission to `install.bin`:

```
chmod +x ./install.bin
```

3. Run the installer command:

```
./install.bin
```

4. Follow the on-screen instructions to complete installation.

## Post-installation configuration

After you run the installer, there is some additional configuration you need to perform.

### Registering your serial number

For your Cleo Harmony software to be fully operational, you must register your serial number.

The first time you launch the Cleo Harmony native admin UI, it will automatically prompt you to register. The first time you launch the Cleo Harmony web admin UI, it will prompt you for a password (which, by default, is your serial number) and then prompt you to register.



**Note:** The Cleo Harmony software must be running as a service or daemon to use the web admin UI.

The following is a summary of the steps to register.

1. Launch the Cleo Harmony admin UI.
2. Enter your serial number and contact information.
3. If the registration is successful, a Cleo Harmony temporary license is activated. If you have trouble connecting during the registration process, you might need to configure Cleo Harmony software for a proxy. Click **Help** on the registration panel for instructions on configuring for a proxy.

Once you have purchased and installed the Cleo Harmony product into its final production destination, and before the end of the evaluation period, you should request your **Permanent License**. For a description of how to do this, see *Request a Permanent License* in the *Cleo Harmony User Guide*.

The Cleo Harmony software must be running as a service or daemon to use the web admin UI. Once it is running as a service/daemon, you can access the web admin UI at `http://<Harmony-server>:5080/Harmony`, where `<Harmony-server>` is the name of the computer where Cleo Harmony software is installed. You can also use the server's IP address instead of the server's name.

If the Cleo Harmony software is not already running as a service or daemon, you can temporarily run it for the duration of your session from the command line as follows:

```
Harmonyc -s service -m
```

If port 5080 is already being used by another application, you can specify a different port using the following command line; where `nnnn` is the new port number.

```
Harmonyc -p "Local Listener" -t "<Host><Httpport>nnnn"
```

After changing the port number, restart the Cleo Harmony service/daemon. Then use the new port number when starting the web UI: `http://<Harmony-server>:nnnn/Harmony`.

### Configure your firewall

The Cleo Harmony product depends on your firewall configuration, which depends on your connection method and host requirements. Make sure you have configured your hosts before you configure your firewall. Generate the Cleo Harmony TCP/IP Port Usage Report for a description of firewall requirements for the activated and configured host(s). Present the information from this report to your system administrator to verify that your firewall has been configured properly.

1. Start the Cleo Harmony software, if necessary.
2. Configure your usage report. In the web admin UI, go to **Administration > Network > Ports**. In the native UI, go to **Tools > TCP/IP Port Usage**.

**Native UI only:** In the native UI, the Cleo Harmony software displays a dialog box where you can select the folders you want to report on. Select the appropriate folders and then click **Continue**.

3. The Cleo Harmony software displays the report.
4. Click **Save As** to save your report.
5. Review the report with the system administrator responsible for your firewall to make sure your configuration is correct.



# 4

## Test your installation

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Cleo provides a test host for many of the common protocols. Clone and activate the appropriate test host, then run the test action for that host. A successful result confirms that the firewall is generally configured correctly and that you are ready to test directly with your partner(s).

Perform the following steps in the admin UI:

1. Configure your local listener. It must be fully configured for your protocol of choice. Make sure you have a local certificate defined - either a self-signed certificate or an imported certificate of user choice. See the *Cleo Harmony User Guide* for information about configuring your local listener.
2. Activate the appropriate test host. Right-click the Cleo Test host you want to use on the **Templates** tab within the Cleo Harmony UI and select **Clone and Activate**.  
The test host is added to your **Active** tab.
3. Make sure an outbound connection to `test.cleo.com` is available.
4. On the **Active** tab, expand your test host and run the `test` action.
5. Verify results. Look for a success or error message in the message pane.

# 5

## Optional configuration

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This section describes some optional configuration tasks.

### Customizing your admin UI login page splash image

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You can replace the default login page splash image with your own.

Place your custom splash screen in the `conf/images` directory in the Cleo Harmony home directory. The filename must start with `splash`. That is, the word, `splash`, followed by a period. For example, `splash.companyABC.png`. Supported formats include JPEG, GIF, and PNG. The image can be no larger than 525px x 340px and no smaller than 250px x 100px.

You do not need to restart the software for the images to change.

### Naming your installation

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You can name your Cleo Harmony installation.

1. In the Cleo Harmony web admin UI, go to **Administration > Network > Synchronization**. In the native admin UI, go to **Configure > Synchronization**.

The **Synchronization** page appears.

2. On the **Synchronization** page, double-click on the first entry in the sync table (the dot entry), and enter the optional alias.

Even if you fully synchronize this instance with another (see *Synchronize User Configuration on Multiple Instances* in the *Cleo Harmony User Guide*), the optional alias will remain unique to this instance.

### Customizing Cleo Portal login page graphics

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You can customize the look of your Cleo Portal login page by replacing the graphics files displayed by the product.

- Navigate to and replace the following files:
  - `<installDir>/webserver/mftportal/images/layout/background.png` - login screen background image.
  - `<installDir>/webserver/mftportal/images/layout/logo.png` - login screen logo.
  - `<installDir>/webserver/mftportal/images/layout/logo-header.png` - header logo.



**Note:** If you re-run the installer, the original graphics files are reinstalled with the product and you must make this customization again.

# 6

## Uninstalling your Cleo software

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If you encounter problems after installation, it is possible to uninstall your Cleo Harmony software.

### Uninstalling Cleo Harmony

Do one of the following:

- **For Windows:** do either of the following:
  - Navigate to the directory in which the Cleo Harmony software is installed and execute the `UninstallHarmony.exe` program.
  - Use the Windows Control Panel to uninstall the Cleo Harmony software.
- **For Linux/Unix:** Navigate to the directory in which Cleo Harmony software is installed, and then enter the uninstall command as follows:

```
./Uninstall Harmony
```