



Migrating from Office Communications Server 2007 R2 to Lync Server 2010

Introduction

In this document, we will be guiding you through the general migration process from OCS 2007 R2 to Lync Server 2010 and I'll be giving some hints and tips for the migration, gathered from our experience with the constant move to several Beta's, the Release Candidate and finally the RTM version of Lync Server.

We will also be looking into the coexistence scenario and the inside out process for side-by-side migration. This is the best practice migration process as recommended by Microsoft. The focus of this document will be on OCS 2007 R2 Standard Edition, but the steps are very similar if you're running the Enterprise Edition.

Coexistence overview

As mentioned the supported migration process is based on a side-by-side coexistence scenario. This effectively means you'll be deploying a new Lync Server role for each existing OCS 2007 R2 server role.

Once the new roles have been deployed active operations can easily be shifted between the legacy servers and the new Lync servers. Typically you would keep operations on the legacy servers until you've finalized testing with a couple of pilot users on the new Lync setup. Then, after testing and when all users have been migrated the legacy roles can be decommissioned.

An important issue to keep in mind is once a user is migrated to Lync they will still be able to sign in with the 2007 R2 MOC, but as soon as the MOC is upgraded to the Lync 2010 client and should the user be moved back to an 2007 R2 pool they won't be able to sign in using the Lync 2010 client. Be sure to only upgrade the clients once pilot testing is completed.

Prepare for migration

As a best practice, before starting migration, apply the latest updates on the 2007 R2 environment. The latest ServerUpdateInstaller.exe can be found here: <http://support.microsoft.com/kb/968802>

For any of the 2007 R2 MOC clients also apply the latest update package from here:

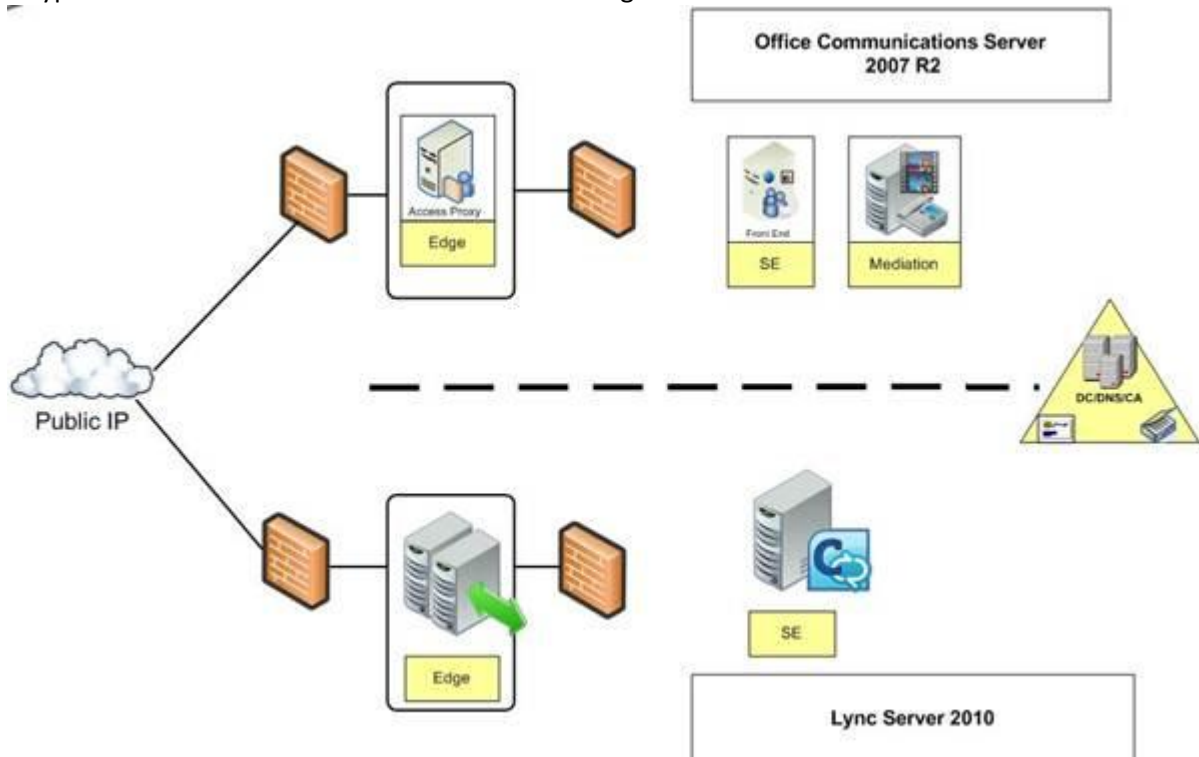
<http://support.microsoft.com/kb/2028888>

To make sure there are no configuration issues on the 2007 R2 pool it's a good idea to run the Best Practices Analyser and which can be found here: <http://support.microsoft.com/?kbid=954048>

Last but not least it's also advisable to create a full backup of the user data on the 2007 R2 pool. The tool for the job is called **DBIMPEXP.EXE** and can be found in the C:\Program Files\Common Files\Microsoft Office Communications Server 2007 R2\Support directory.

Deploy Lync Server 2010 Pilot Pool

A typical coexistence scenario would look something like this:

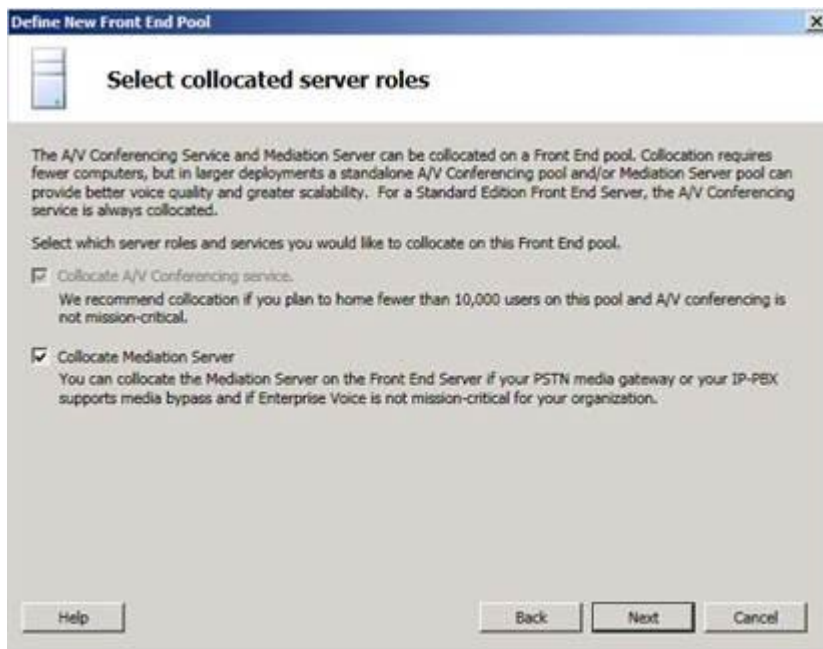


Any users homed on the OCS 2007 R2 pool will operate as they did previously, any edge traffic will travel over the legacy edge pool. Users homed on the Lync Server 2010 pool will be automatically redirected, and edge traffic is still travelling over the legacy edge pool. At this point there is no need to change DNS A and/or SRV records.

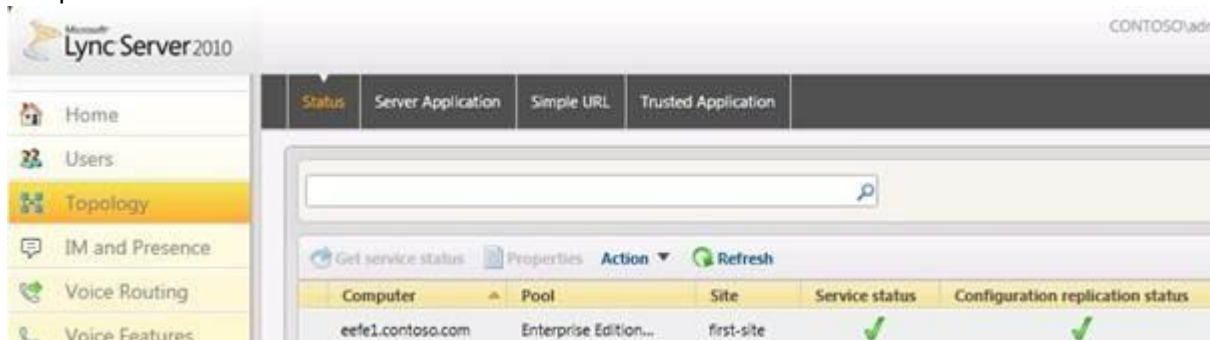
The steps to deploy a Lync 2010 Standard Edition Server are well documented so I'll only touch the surface here. We're looking to deploy the same roles currently supported by OCS 2007 R2 so we're starting by choosing to deploy a Standard Edition Server using the Topology Builder:



We're going to choose to collocate the Mediation Server. Not only does this simplify our server infrastructure, it is also a requirement for the pilot pool:



Once you defined the new Standard Edition Server we're going to make sure our simple URLs are configured by editing the properties of the topology. You will need a dial in URL for phone access, a meeting URL for meeting access and an admin URL. These also need to exist in DNS. When you're happy with the topology, it can be published. To do this, we'll first need a database to publish to, so in the Deployment Wizard we're going to run **Prepare first Standard Edition server**. Before you do this however, make sure the procedures for preparing Active Directory have been followed and completed successfully. Once this is all completed we can publish the created topology from the Topology Builder. Now we can go ahead and run the deployment wizard again, this time choosing to **Install or Update the Lync Server system**. This will populate the Local Configuration Store and setup the Lync Server components. Once the setup is completed verify the services are running and replication has completed:



Migration

After we have our Lync Server pilot pool up and running, we can import the legacy topology. Again, we're using the Topology Builder to import the legacy server roles and their settings. Because most of these settings reside in WMI repository, we'll need a WMI backward compatibility package you can find on the Lync installation media: `\SETUP\AMD64\SETUP\OCSWMIBC.MSI`. Now, in the Topology Builder we can choose **Merge 2007 or 2007 R2 Topology** from the Actions pane. In the **Specify Edge Setup** screen, we're going to add our legacy edge server. You will need to

enter your edge server IP addresses and port details here. Complete the wizard, and verify all the 2007 R2 roles are present in the BackCompatSite topology.

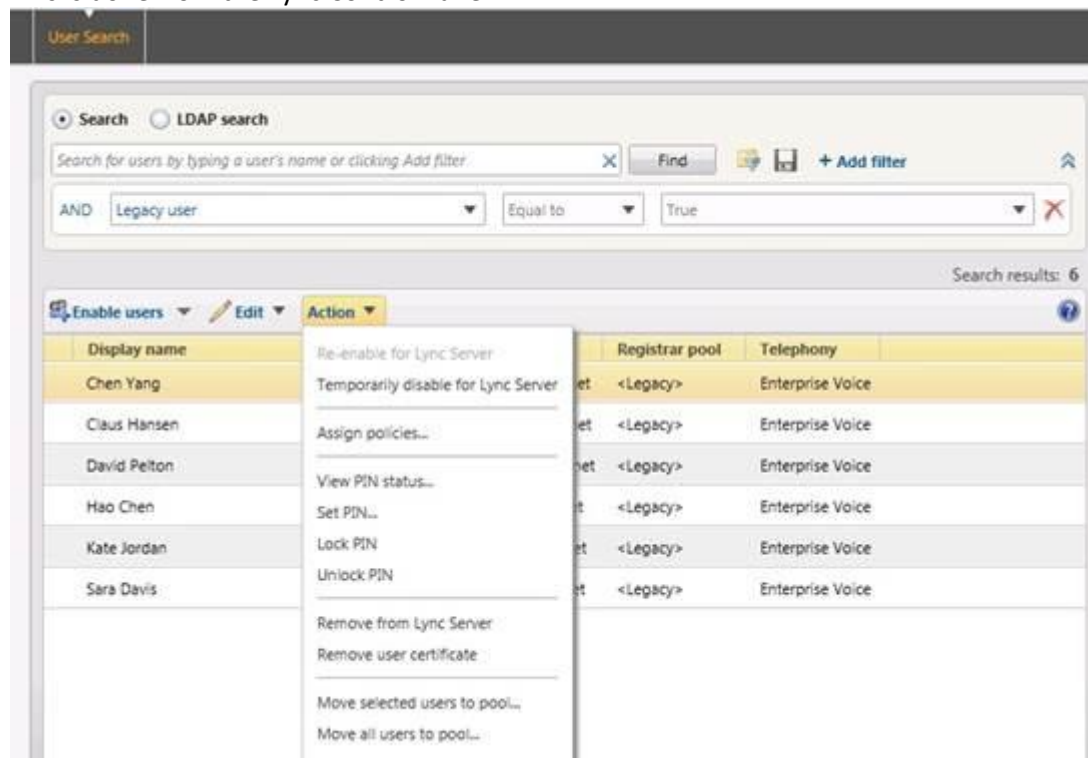
We have our topology, now we need to run the **Import-CsLegacyConfiguration** cmdlet to import policies, voice routes, dial plans, URLs and dial in access numbers to Lync Server 2010. After the script completes, verify the imported policies now appear in the Lync Control Panel.

Configuration

At this point any edge traffic and federated traffic are still travelling through the legacy edge server. To enable the Lync Server pilot pool to use the legacy edge, again open the Topology Builder and edit the properties of the site. You'll notice a **Federation route** we need to point to our legacy edge server in the BackCompatSite.

Also, in the properties for the Standard Edition Server we're going to associate it with an Edge pool, again the legacy edge pool in our BackCompatSite. At the same time we'll also need to add the Lync Server pilot pool to the trusted internal server list on the legacy edge pool.

We can now migrate the first pilot users from the 2007 R2 pool to the Lync Server 2010 pilot pool. This is done from the Lync Control Panel:



Here we add a filter for "Legacy user", select the required users and click **Action, Move selected users to pool**.

Edge configuration

Following the inside out approach, we're now going to look at deploying the Lync Server 2010 Edge pool. In the Topology builder, we'll be disabling the federation route to the legacy edge pool temporarily. Note that this will break federated traffic until the route is restored through the Lync 2010 edge pool. Next configure the legacy edge pool as a non-federating edge server. In the Actions pane click **Merge 2007 or 2007 R2 Topology**. On the Specify Edge Setup page select your legacy edge and click Change. Untick the box for **This edge pool is used for federation**.

As with the Standard Edition Server, we're starting to configure the edge pool in the Topology Builder. Once all the addresses and ports are filled in as per the specifics for your deployment and

the edge configuration is complete, the topology can be published. Note that the FQDN in the topology for the edge server needs to match, so if your edge is edge.contoso.com you will need to add a DNS suffix in the Computer Name settings on the server that is going to run the edge roles. Since the edge server is not a member of the domain, we will need to export the topology to an XML file for the edge setup to read. This is done with the **Export-CsConfiguration** cmdlet. When running the Deployment Wizard on the edge server we're pointing the Central Management Store configuration to the exported XML file during the **Configure Local Replica of Central Management Store**. We're then completing the installation by clicking **Setup or Remove Lync Server Components**.

We'll be migrating from our legacy edge server so it is advisable to export the public certificates currently in use on the legacy server, including the private key and any optional root certificates. Now restore the edge associations on the Standard Edition server using the Topology Builder and enable the Lync Server 2010 edge server for federation.

Decommission Legacy deployment

After testing with the pilot users and making sure all the routes and functionality is as expected, we can move on to migrate the rest of the users over to the new Lync Server 2010 pool. The same procedure as described above is used.

The OCS 2007 R2 servers and roles can now be decommissioned by deactivating the roles in the supported order. Once this is completed the migration process will be finished.

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