



How to Use this Guide

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This guide is the starting point for all upgrades and migrations to a new release of Unified Communications Manager or IM and Presence Service. The table below outlines how to use this guide to plan and then perform an upgrade or migration.

Procedure

	Command or Action	Purpose
Step 1	Understanding Upgrades and Migrations	Use the information in this section to understand: • the differences between an upgrade and a migration • the upgrade methods that are available to you • the differences between export restricted and unrestricted software
Step 2	Plan the Upgrade or Migration	Use the information in this section to plan your upgrade or migration: • determine the scope of the upgrade; for example, determine whether you need to upgrade your hardware or your virtual environment to meet the requirements of the new release. • understand the system requirements and limitations. • verify that your upgrade path is supported.

	Command or Action	Purpose
		• review the deployment types and recommendations to see which upgrade or migration method we recommend for you. • if we recommend that you perform a direct upgrade, determine the sequence in which you should perform upgrade procedures in order to balance the time required for the upgrade and the impact on your network. • gather the documentation that you need to complete the upgrade or migration.
Step 3	Change the Virtualization Software	Use the information in this section to download and install OVA templates and to upgrade your virtual environment, if needed.
Step 4	Upgrade the Applications	Use the information in this section when you are ready to begin to upgrade or migrate the Unified Communications Manager and the IM and Presence Service applications. • Complete the pre-upgrade tasks in this section that are identified for the type or upgrade or migration that you are doing. • After you complete the pre-upgrade tasks, perform the upgrade or migration using the method and the documentation that you identified during the planning stage. For example, if you are performing a direct upgrade using the Cisco Unified CM OS Admin interface, follow the procedures in this guide. If you are performing a direct upgrade or a migration using Cisco Prime Collaboration Deployment (PCD), follow the procedures in the PCD documentation. • Complete the post-upgrade tasks in this section for all upgrade and migration methods.
Step 5	Troubleshooting	Use the information in this section to troubleshoot problems that occur during the upgrade process.
Step 6	Appendix	Use the information in this section to: • review frequently asked questions.

	Command or Action	Purpose
		• find out how to upgrade or migrate from a legacy release. • find additional resources to help with the upgrade or migration process.

