



## 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
<b>Step 1</b>	<a href="#">Understanding Upgrades and Migrations</a>	Use the information in this section to understand: <ul style="list-style-type: none"><li>• the differences between an upgrade and a migration</li><li>• the upgrade methods that are available to you</li><li>• the differences between export restricted and unrestricted software</li></ul>
<b>Step 2</b>	<a href="#">Plan the Upgrade or Migration</a>	Use the information in this section to plan your upgrade or migration: <ul style="list-style-type: none"><li>• 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.</li><li>• understand the system requirements and limitations.</li><li>• verify that your upgrade path is supported.</li></ul>

	Command or Action	Purpose
		<ul style="list-style-type: none"> <li>• review the deployment types and recommendations to see which upgrade or migration method we recommend for you.</li> <li>• 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.</li> <li>• gather the documentation that you need to complete the upgrade or migration.</li> </ul>
<b>Step 3</b>	<a href="#">Change the Virtualization Software</a>	Use the information in this section to download and install OVA templates and to upgrade your virtual environment, if needed.
<b>Step 4</b>	<a href="#">Upgrade the Applications</a>	<p>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.</p> <ul style="list-style-type: none"> <li>• Complete the pre-upgrade tasks in this section that are identified for the type or upgrade or migration that you are doing.</li> <li>• 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.</li> <li>• Complete the post-upgrade tasks in this section for all upgrade and migration methods.</li> </ul>
<b>Step 5</b>	<a href="#">Troubleshooting</a>	Use the information in this section to troubleshoot problems that occur during the upgrade process.
<b>Step 6</b>	<a href="#">Appendix</a>	<p>Use the information in this section to:</p> <ul style="list-style-type: none"> <li>• review frequently asked questions.</li> </ul>

	<b>Command or Action</b>	<b>Purpose</b>
		<ul style="list-style-type: none"><li>• find out how to upgrade or migrate from a legacy release.</li><li>• find additional resources to help with the upgrade or migration process.</li></ul>

