

Instant Buddy List Migration

Staged Contact List Migration from IBM Sametime to Microsoft Lync 2010



Instant Mission

We develop social applications for enterprises – generally leveraging an enterprise IM platform

Enterprise-class compliance and productivity solutions for IBM Lotus Sametime and Microsoft Lync

- IM Archiving, e-Discovery, and Compliance
- IM Help Desk Applications (click to chat)
- Contact List Migration and Management

Your Business Dilemmas

- Migrate Sametime contacts to Microsoft Lync
- Co-Exist the 2 platforms and 'slowly' migrate from Sametime to Microsoft UC
 - Users will be migrated and updated in both systems automatically
 - Migrate several hundred people per night
- During migration process, different business groups might use either Lotus Sametime or Microsoft OCS/Lync

Value Proposition for Contact Migration

Many people within an organization have spent years developing their 'social' network of IM users

Unlike email, where the address book and previous emails provide the context, IM is based around personal contact lists

Individual social networks have value – and without a conversion, everyone will start with a blank slate (no network)

Staged Migration Process (high level)

- Step 1 Configure Sametime and Lync environments in a proxy/shared environment
- Step 2 Install Instant applications on both systems
 - Install Buddy List Administrator on Sametime server (or Domino server)
 - Install Instant Migration module in trusted app pool on Lync server (edge server)
- Step 3 Create migration activities – this will provide Instant’s migration module with migration information
- Step 4 Migrate groups of people from Sametime to Lync – and update contact list references for both environments

Step 1 - Configure Sametime and Lync in a proxy/shared environment

- Configure both systems to support shared awareness
- Configure Sametime server to view Lync users as external contacts
 - For Sametime users, the Lync user will be marked as external
 - As people are migrated from Sametime to Lync, they will need to be referenced as either external, or local, users
 - Configuration typically involves a Sametime Proxy server
- The Lync server will view Sametime users as external users
 - As people are migrated, their contact list will be recreated in Lync
 - For the contacts that remain on the Sametime server, those people will be referenced as external users

Step 2 Install Buddy List Administrator on Sametime server

- Instant's Buddy List Administrator is a trusted Sametime Server application
- Ability to view and update contact lists for any Sametime user
 - Provide contact list to Lync application
 - Identify and update any people who are moved – the person will now be marked as external users after they are migrated
- Server-side management console
 - Centralized control and migration of groups and users
 - Activity database provides staging area for migration
 - View logs for all activities
- Real-time, live updates
 - Server does not need to be stopped or rebooted
 - Users can be online and active

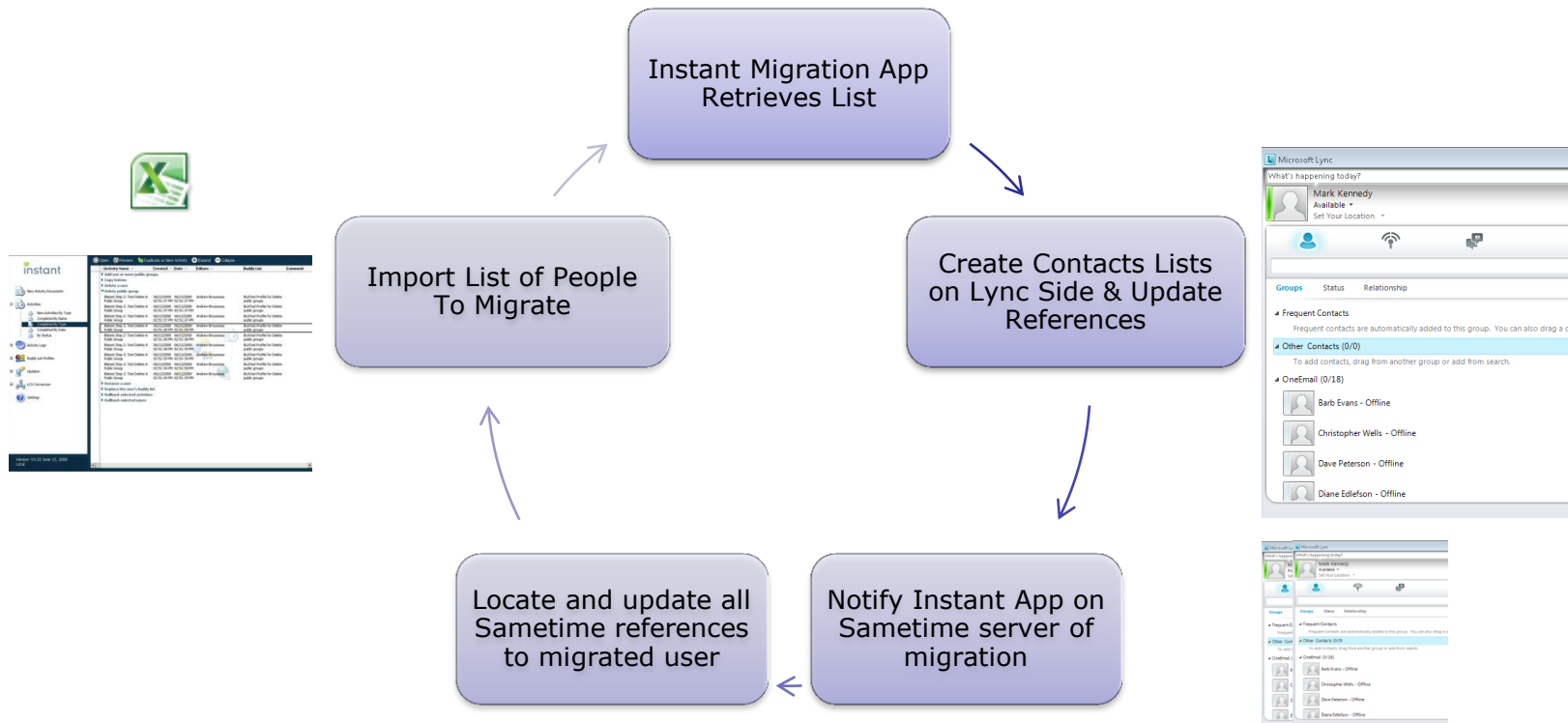
Step 2 Install Migration App on Lync Environment

- Instant's Migration Application runs within trusted application pool (probably on edge server)
- Interacts with Lync contact list API on behalf of a user
- Communicates with Instant's Buddy List Administrator over HTTP to retrieve list of people to migrate
- Creates contact lists on the Lync server
 - Creates the contact list
 - Updates existing contact lists as people are migrated
 - For example, in addition to creating the contact list for Joe Smith, the application will also locate all references to Joe Smith and mark Joe as a local Lync user (not an external Sametime user)

Step 3 Create Migration Activities

- Migration list is maintained within the Instant Buddy List Administrator (on the Sametime side) – with a Notes database
- List may be imported from Microsoft Excel
- One migration activity per user who will be migrated
- The migration application will read this list of activities (over HTTP)
- A full log will be maintained for each converted/migrated user

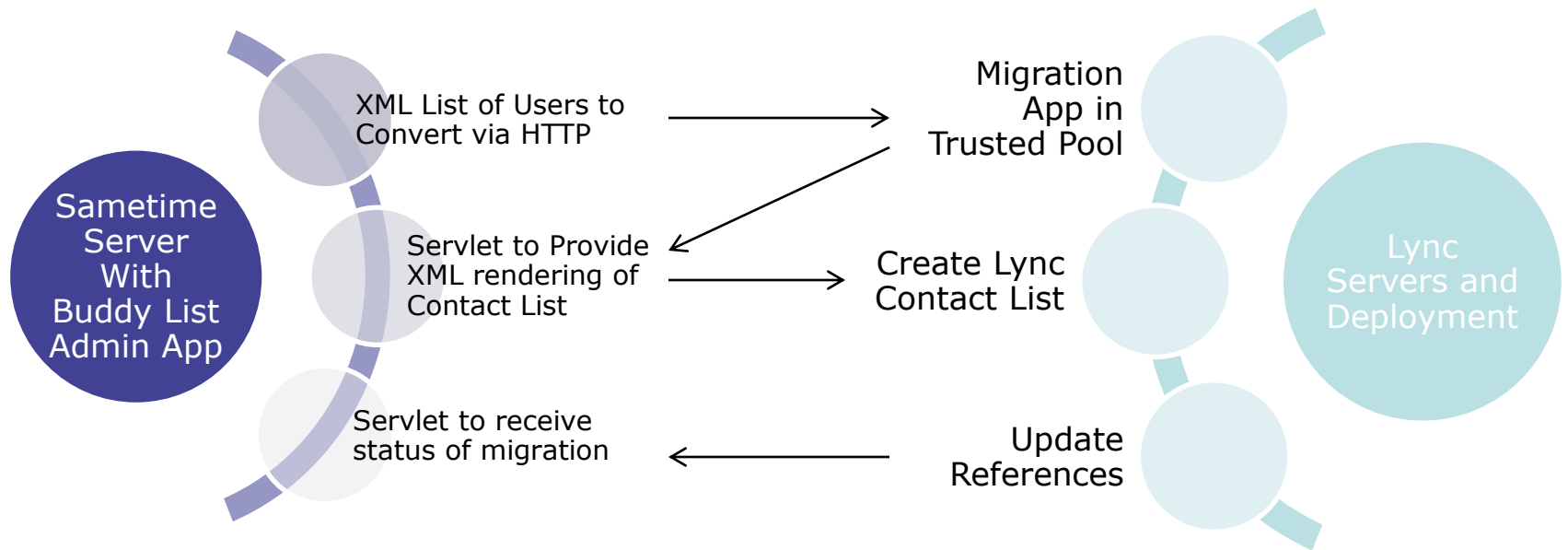
Step 4 - Migration Process



Step 4 Migrate People Using Activities

- The migration may be either scheduled at night or 'on demand'
- An activity record will be created to control which person is migrated
- One activity record per person – may be imported from Excel
- Each person will have their contact list created on the Lync server
 - On the Lync server, all people who previously referenced the person as an external Sametime user will now reference the person as a Lync user
 - After the person is migrated, a process will take place on the Sametime server to update all people who previously referenced the person as a Sametime user to now reference them as an external Lync user
- So, for one individual migration, it's possible that 100 people will be referenced and updated on each platform – in order to correctly locate the person (i.e. external or internal to the platform)

Step 4 - Server Configuration



Step 4 - Migration Process

- During the migration process, Instant's application will convert the Sametime contact list into an intermediate XML format
- The persons ST User ID and Email address will be resolved
- The persons email address will be used to resolve the SIP address for Lync

```

<?xml version="1.0" encoding="UTF-8" ?>
- <xmlBuddyList>
  <requestStatus>SUCCESS</requestStatus>
  <Name>Mark Kennedy</Name>
  <UserEmailAddress>Mark.Kennedy@Acme.com</UserEmailAddress>
  <STUserID>CN=Mark A Kennedy/OU=Portsmouth/OU=CHMS/O=Acme</STUserID>
  <DateExported>09-11-2012</DateExported>
- <BuddylistGroups>
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    </User>
  </GroupUsers>
  </Group>
</BuddylistGroups>
</xmlBuddyList>
  
```

Summary

- Staged migrations are technically possible
- Instant applications will exist on both platforms (Sametime and Lync)
 - Communication between the Instant modules will take place over HTTP and XML
- Complexity is introduced in the process of updating all of the references (contacts that reference a person) after the person is migrated
- Might be possible to organize the migrations in such a manner as to reduce the complexity of updating referenced users