

Instant Technologies



Instant Buddy-List Conversion Utility for IBM Sametime

Installation and Overview Guide

Instant Technologies

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Introduction

These notes briefly describe the installation procedure required to install the Instant Buddy-List Importing utility. This utility creates Lync contact lists from the intermediate xml files generated by the Instant Buddy-list Exporting utility.

The application is deployed as a Lync trusted application and has the ability to login on behalf of each user configured for the Microsoft Lync application server. Prior to launching this application, the various export procedure should have been performed on the designated IBM Sametime server.

System Requirements and Installation of Core Components

Installation Prerequisites

System Requirements:

- Windows 7 or Server 2008 OS
- .Net Framework 4.0
- UCMA Core Components
- Lync TrustedApplicationPool including the installation machine

Steps Prior to Running the Utility

After downloading the utility you will need to perform the following steps before installation:

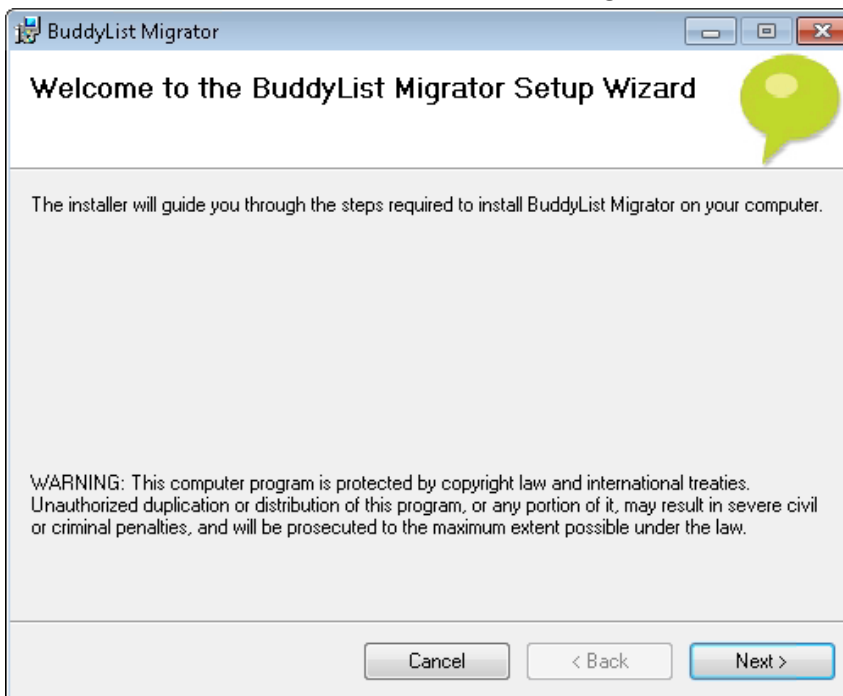
- Create a Lync TrustedApplication context for the utility

Creating a Lync TrustedApplication

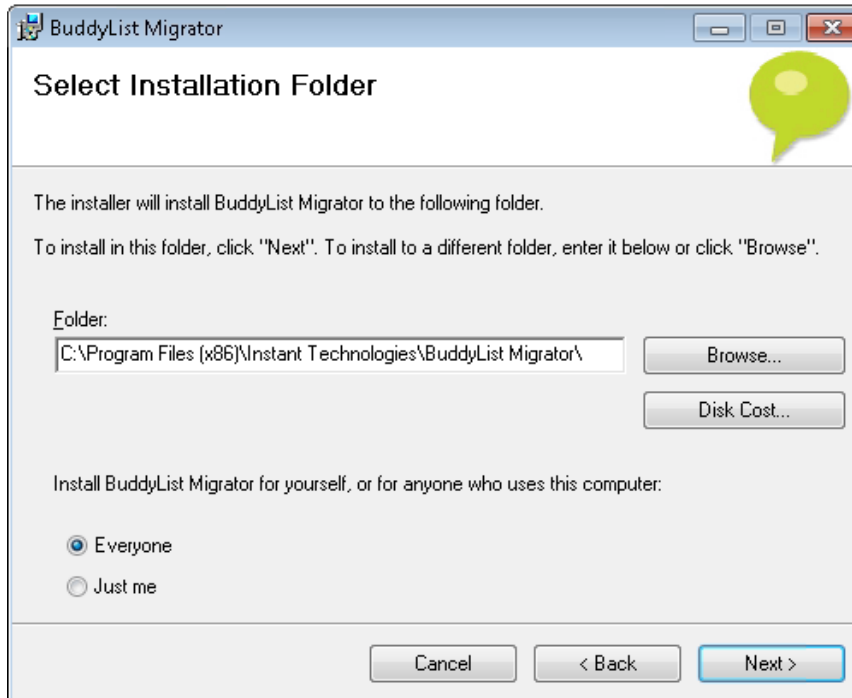
- 1.) Open the Lync Server Management Shell. This is typically found on your Lync Front-end. You should see a PowerShell console, with the Lync-specific cmdlets imported.
- 2.) Run **New-CsTrustedApplication**
- 3.) **ApplicationId**: Supply a descriptive name here
- 4.) **TrustedApplicationPoolFqdn**: The fully-qualified domain name of the trusted application pool. Can be found by running **Get-CsTrustedApplicationPool**
- 5.) **Port**: Select a port to access the trusted application. Should be >1024. Be sure that the port is open on your firewall.
- 6.) Run **Enable-CsTopology** to commit the changes
- 7.) Run "**Get-CsTrustedApplication** > [some file name].txt" This will save the information you will need to configure BuddyList Migrator to a text file, as it is very difficult to copy from the Management Shell.

Installation

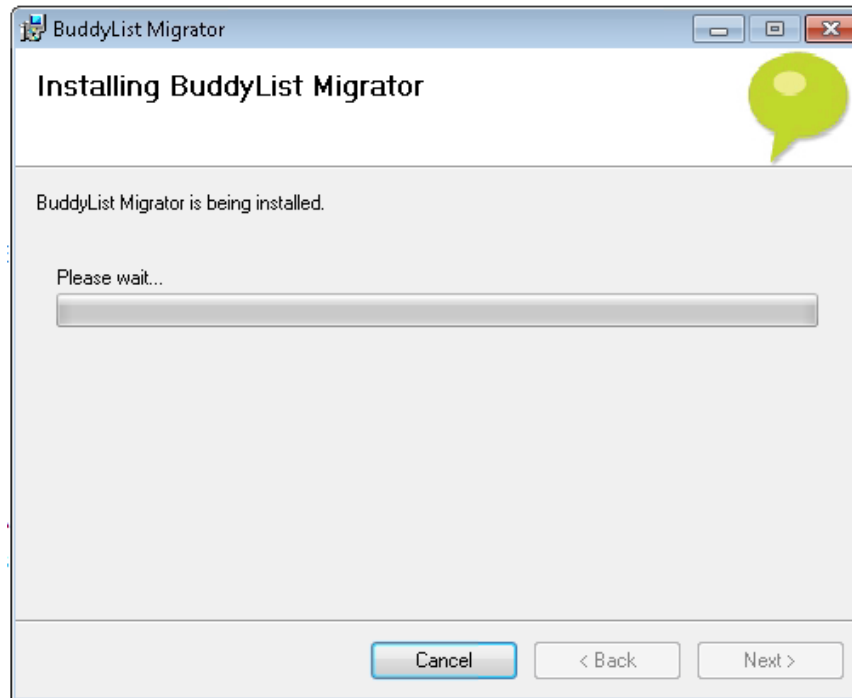
- 1.) Extract the installation .zip package. Run **setup.exe**. You may be prompted by the Windows UAC.
- 2.) You should see a standard Windows installer dialog.



- 3.) If you choose, you may select a different installation location.

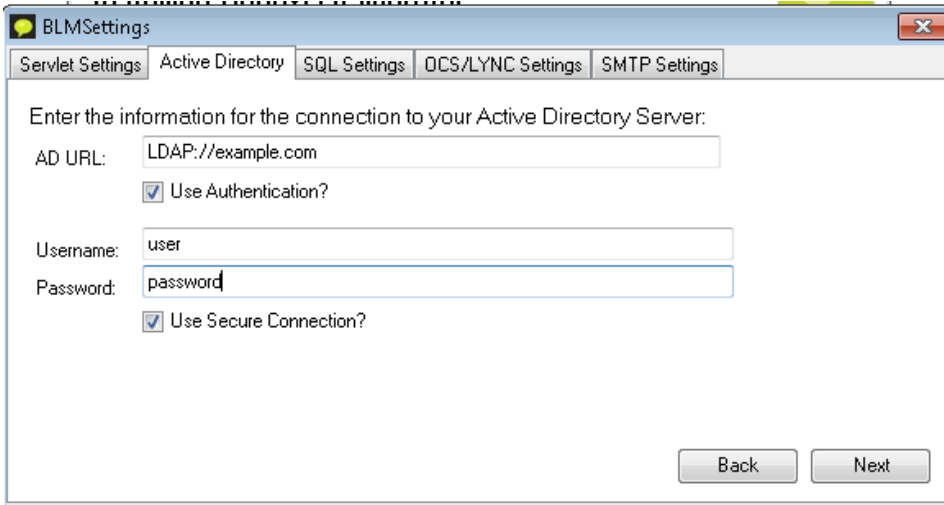


- 4.) The installation should progress.

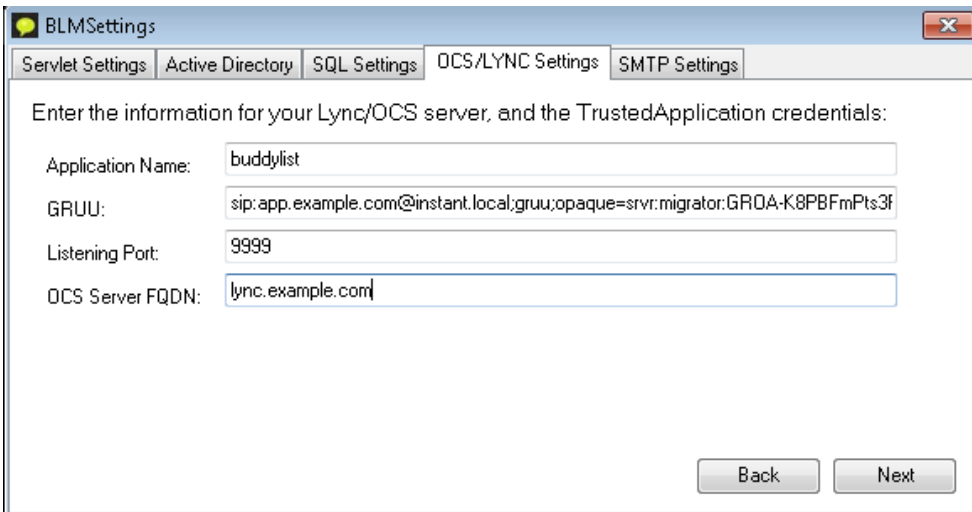


- 5.) During the installation process, you should see a configuration dialog appear. If you are doing a migration using the intermediate xml files generated by the Instant Buddy-list Export utility, you may skip to the **Active Directory** tab. Here you should input credentials to authenticate against

your Active Directory domain controller.

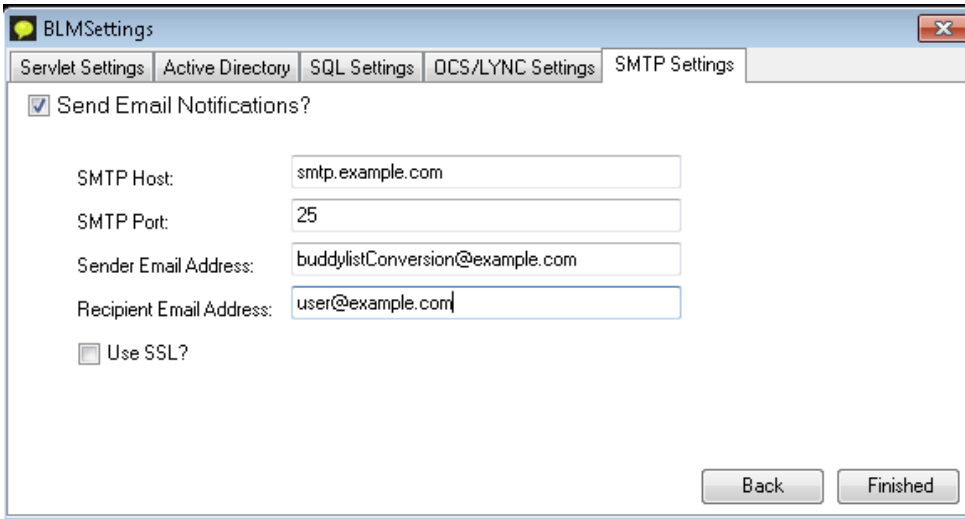


- a. **AD URL:** This should be the FQDN (fully qualified domain name) or IP address of your domain controller, in LDAP format, i.e. LDAP://dc.example.com
 - b. **Use Authentication?:** In most cases, this box should be checked. Only leave this box unchecked if you are absolutely certain that your Active Directory is configured to allow unauthenticated queries.
 - c. **Username:** The username of the account that will be impersonated to make AD queries. This should be in \$DOMAIN\ \$USERNAME format.
 - d. **Password:** The password for this account
- 6.) Skip to the **OCS/Lync Settings** tab. Here you will input settings for connecting to your Lync server and for the TrustedApplication context previously created.

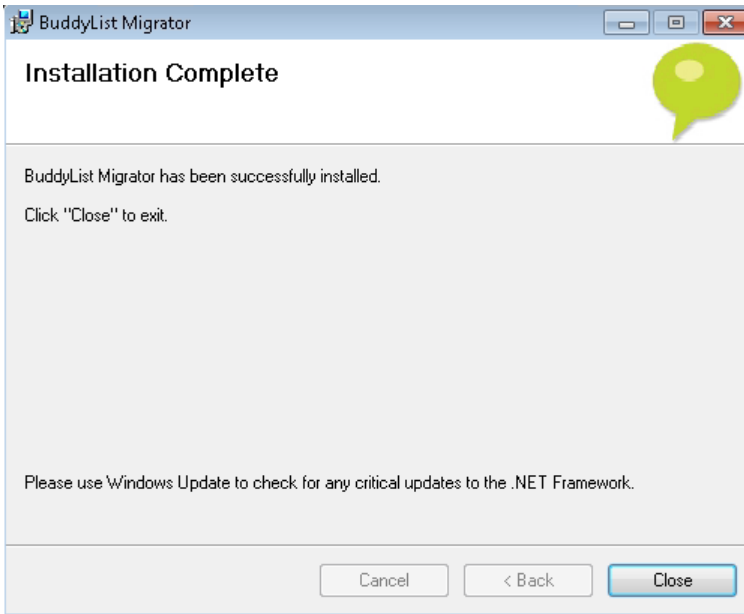


- a. **Application Name:** This should be the value of the field **LegacyApplicationName** in the output from Get-CsTrustedApplication.
- b. **GRUU:** This should be the value of the field **ServiceGruu** in the output from Get-CsTrustedApplication
- c. **Listening Port:** This should be the value of the field **Port** in the output from Get-CsTrustedApplication.

- d. **OCS Server FQDN:** Enter the fully-qualified domain name for your Lync Front-end server.
- 7.) [Optional] If you would like to be dispatched an email when a run of the Import Utility completes, or if a fatal error is encountered, skip to the **SMTP Settings** tab.



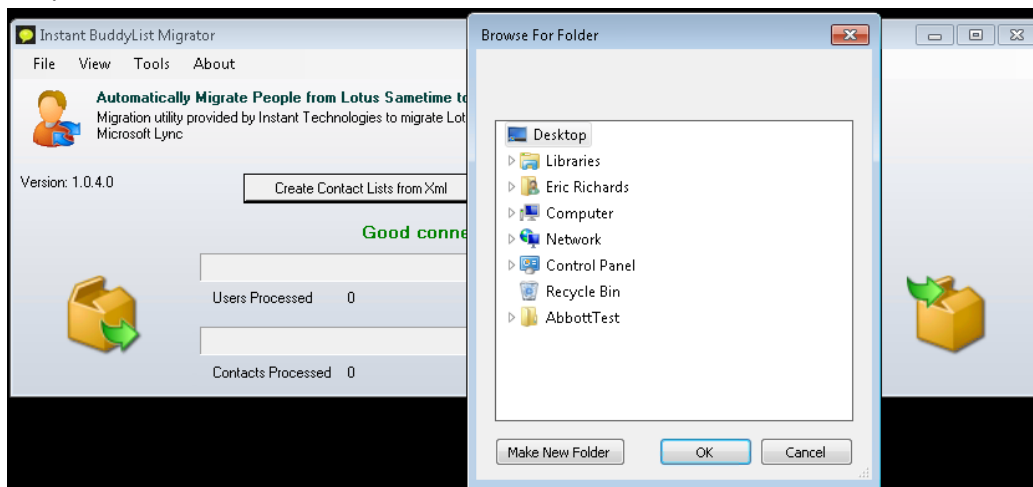
- a. **SMTP Host:** Enter the FQDN or IP address of your SMTP server.
 - b. **SMTP Port:** Enter the port that your SMTP server uses. Typically this is either 25 or 587.
 - c. **Sender Email Address:** The mail will be sent from this address.
 - d. **Recipient Email Address:** The mail will be sent to this address.
 - e. **Use SSL?:** If your mail server uses SSL check this. You will then need to provide a username and password.
- 8.) Click the **Finished** button to save the configuration changes.
- 9.) The Instant Buddy-list Import tool is now installed.



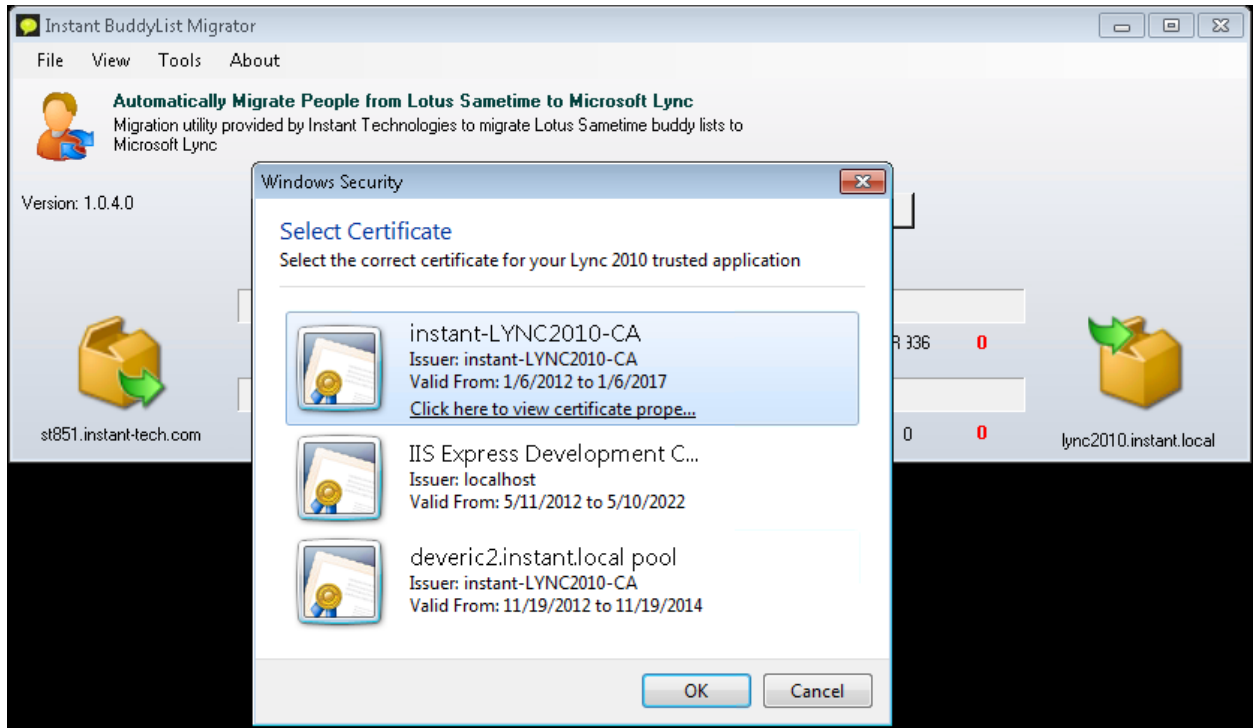
Importing BuddyLists

You can run the import utility by finding **Start->All Programs->Instant Technologies->BuddyListAdministrator->Buddy List Migrator**.

- 1.) To start the import process, click the **Create Contact Lists from Xml** button. You will be prompted to select the directory that contains the output xml from the Instant Buddy-list Export utility



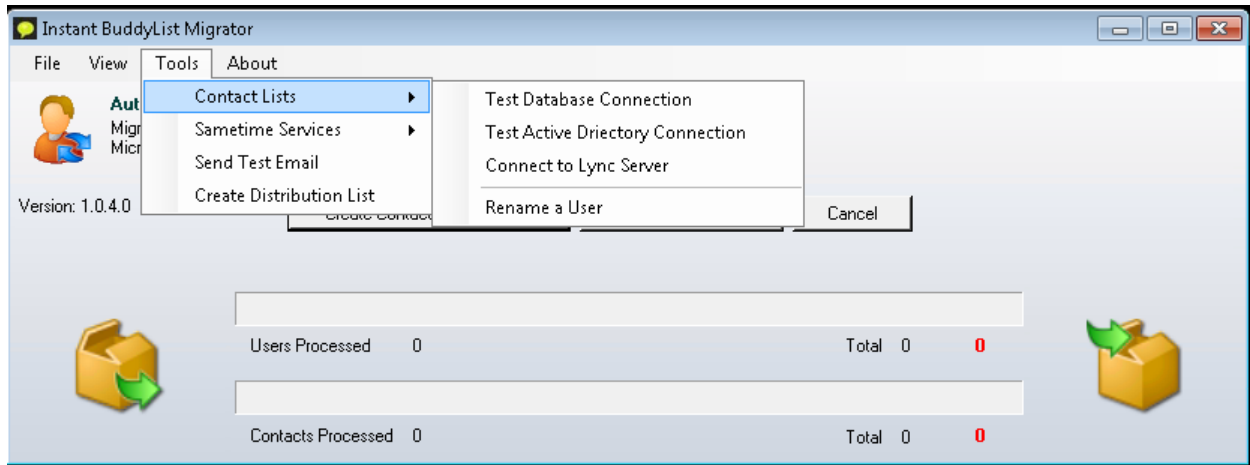
- 2.) You will be prompted to select the certificate to authenticate the TrustedApplication with the Lync Server.



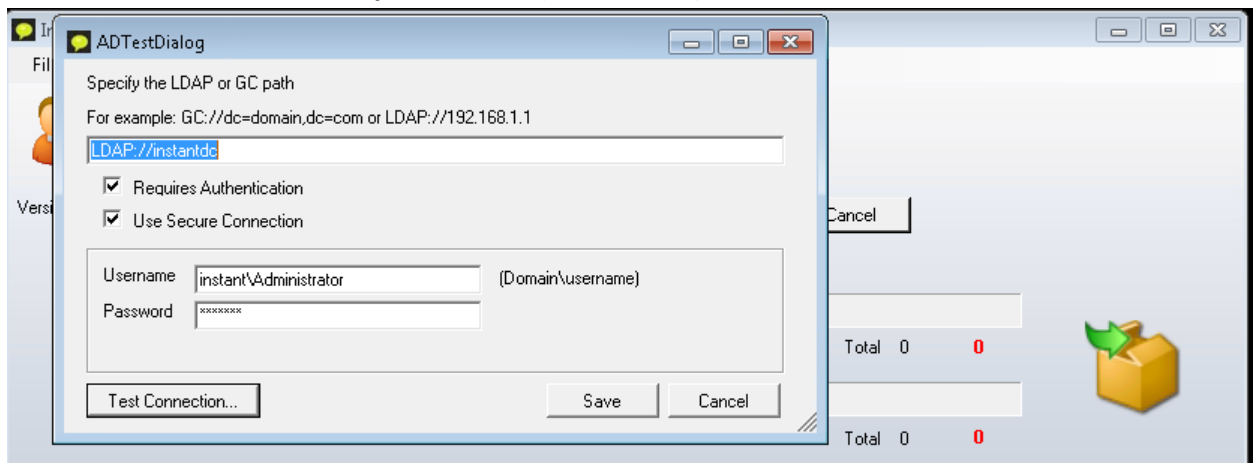
- 3.) The utility will now work through the XML files in the specified directory, creating contacts on each user's buddy-list. After each XML document is processed, depending on the outcome of the import, it will be moved to a subdirectory.
- Converted:** The user was found, and all contacts were created.
 - Partial:** The user was found, and some, but not all of the contacts were created.
 - Failures:** The user was not found, or some other error prevented the utility from creating contact lists.
- 4.) When all users' XML have been processed, the utility will stop.

Diagnosics

In the event that you encounter errors in performing a conversion, or you simply want to verify that your configuration is correct, the Instant Buddy-List Import utility features several diagnostic features.

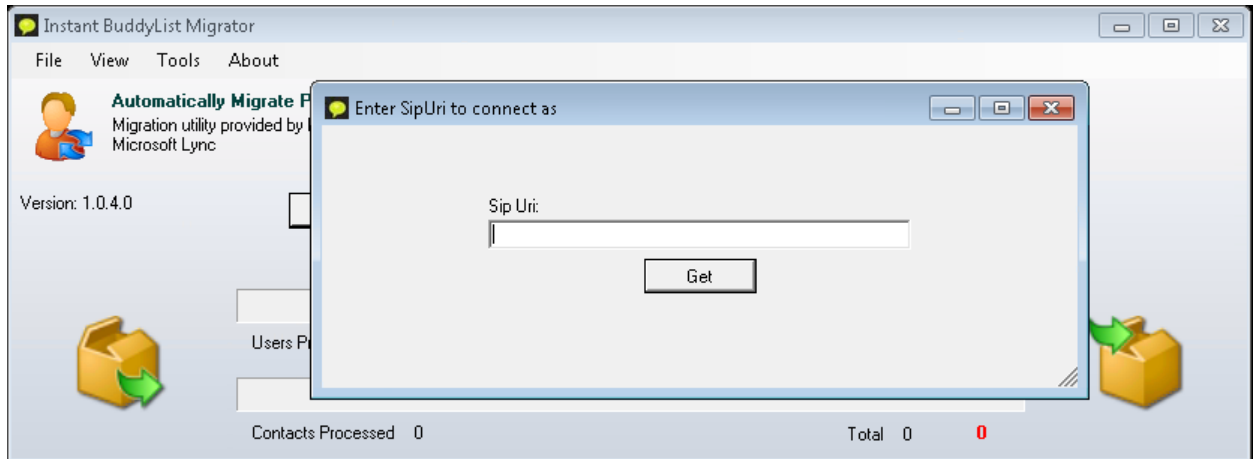


- A.) **Testing Active Directory connection:** Under **Tools->Contact Lists-> Test Active Directory Connection** you may test whether the application is correctly configured to talk to your Active Directory server. If you need to modify the AD settings, these can be found at **File->Preferences->Active Directory Connection (Ctrl+Shift+A)**.

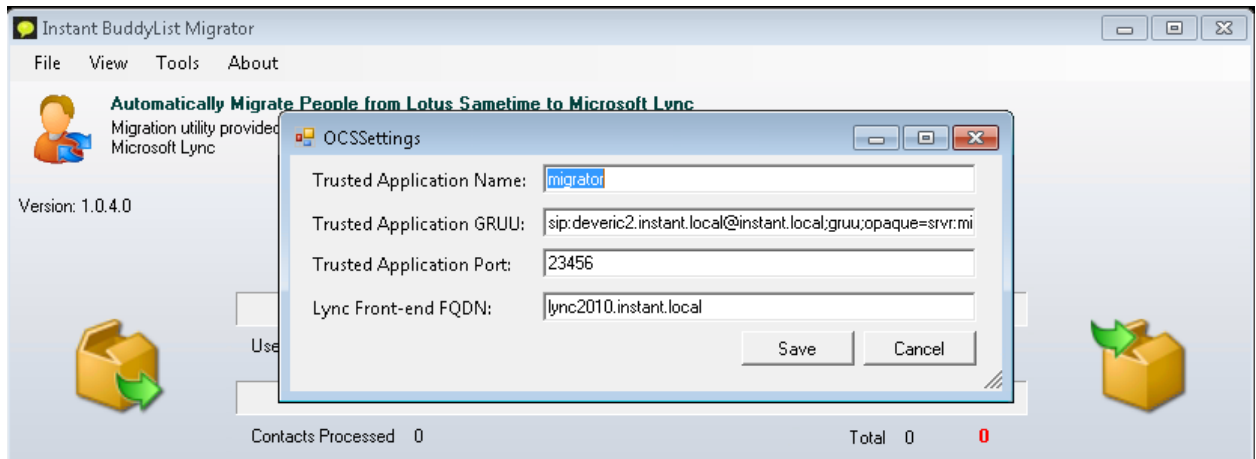


From this dialog, you may tweak your connection information, and test that the settings are correct. Save the settings using the **Save** button.

- B.) **Testing OCS/Lync Connection:** Under **Tools->Contact Lists-> Connect to Lync Server** you may test whether the application is correctly configured to talk to the Lync Front-end server. You will be prompted to select your TrustedApplication certificate, and to input a SIP uri.



The Utility will then log into the Lync server as the user whose SIP uri you have specified. If you need to modify the Lync settings, these can be found at **File->Preferences->Lync Settings**.



Log files

While the application is running it generates log files in “<<application install location>>\Logs” folder:

1. **log.txt:** This is the most verbose log file, including error messages, as well as informational and debug messages.
2. **failures.txt:** This log file records any errors raised during the course of an import.
3. **success.txt:** This log file will have one entry for each successfully imported buddylist.

These are helpful in debugging and error-reporting situations, so if you need to contact support@instant-tech.com please include your log files.