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Allocating Equipment Costs with GCAS

In addition to supplying Web reporting for the Telecom Billing System, one of the benefits to having the Enhanced package of the OTM TBS is access to the General Cost Allocation System and the Consolidated Reports System. The GCAS package allows the user to allocate additional charges other than the standard Nortel CDR that is processed in the TBS. Examples include equipment costs, Internet charges, cell phone and pager charges, and rent monies. The CRS package provides additional reports to combine the phone charges in the TBS with the extra charges defined in the GCAS. **Figure 1** shows GCAS and CRS as they appear in the OTM System window tree.

Note that these features are not included with the General package of TBS.

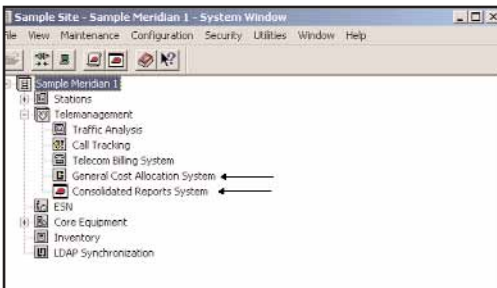


Figure 1.

Continued on page 2 - Allocating

ISI OTM Services

ISI Telemangement Solutions, Inc. has been in the business of providing installation, training and support services of OTM for the Meridian 1 since its inception, beginning with its predecessor, MAT, more than eight years ago. ISI intends to continue providing OTM services for years to come. We have recently expanded our OTM service offerings to include installation, training and support of Succession Element Manager and OTM for the Meridian SL-100. We continue to support MAT, for those customers who have not yet upgraded to OTM, as we are committed to meeting our customers' needs. ISI maintains an excellent reputation in the marketplace and we look forward to assisting our partners in delivering the highest quality installation, training and support services of OTM for the Meridian 1/Succession and for the Meridian SL-100.

Please note: ISI's Infotel Select Desktop and Enterprise call accounting systems have been certified by Nortel and work in conjunction with OTM and its DBA (Data Buffering Access) feature for data acquisition.

ISI remains a leader in providing telemangement solutions, including Call Accounting, Billing and Analysis, Invoice Management, Wireless Management, Facilities Management and web-based Call Center Training. Please contact Carl Jacobs, Senior Sales Support, at 847.706.5043 for information on how ISI can address your customers' telemangement needs.

OTM Integration

ISI Telemangement Solutions is pleased to announce integration between Nortel Networks' Optivity Telephony Manager (OTM) and Infotel Select, ISI's premier telemangement system.

ISI is uniquely qualified to provide this integration. In addition to offering a full suite of OTM installation, support, and training services, ISI is a Nortel Networks Development Partner. Infotel Select has received a Certificate of Compatibility for Nortel. This certificate indicates that Infotel Select has formally been tested and certified as compatible with both the Meridian and Succession platforms.

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Allocating - continued from page 1

The text below details how to define an equipment cost charge in GCAS, and how to run the CRS report that will combine it with the standard TBS charges.

1. From the System window as shown in **Figure 1**, open the GCAS module. There are three types of billing methods that appear in the main GCAS window. They are: **Quantity-Based Billing**, **Time-Based Billing**, and **Destination-Based Billing**. Quantity-Based Billing has quantitative amounts and unit charges such as equipment costs. Time-Based Billing has start times and duration such as Internet usage. Destination-Based Billing has direction, route, source and destination information for items such as cellular phones or pagers. Each billing method is similarly configured.

The example uses Quantity-Based Billing as shown in **Figure 2**. Highlight it and right-click. Then, select New Bill Type. In the Properties tab, rename the Billing type as shown in Figure 3. Then, in the Identify Bill Party by box, choose a Billing Key as shown in Figure 4. The default is by extension number. Click on the ellipsis to view other options. The extension number is a good key because it directly relates to the entries in the Employee Directory which is common to the TBS, Station Administration and GCAS modules. When finished, click the Save button.

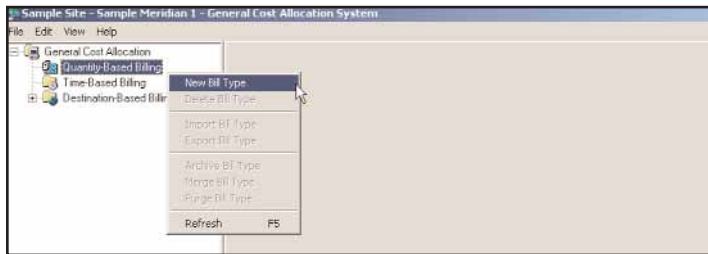


Figure 2.

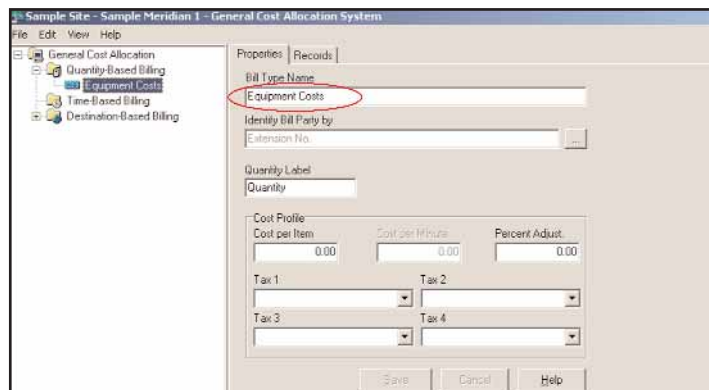


Figure 3.

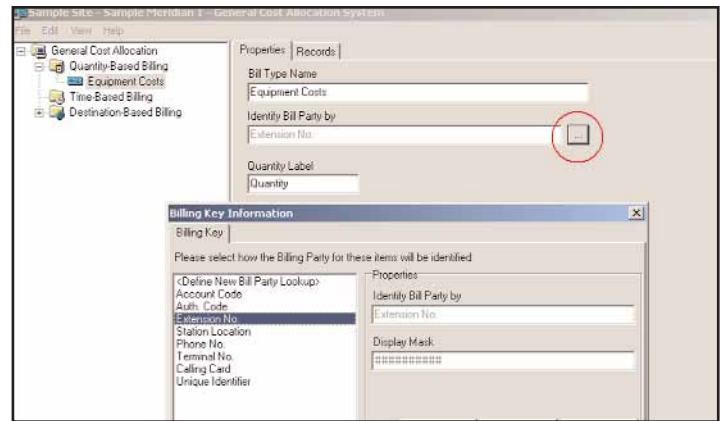


Figure 4.

2. After saving the Billing Type definition, a **Records** tab will appear as in **Figure 5**. Create Equipment Cost records for extensions by right-clicking and choosing **Add**.

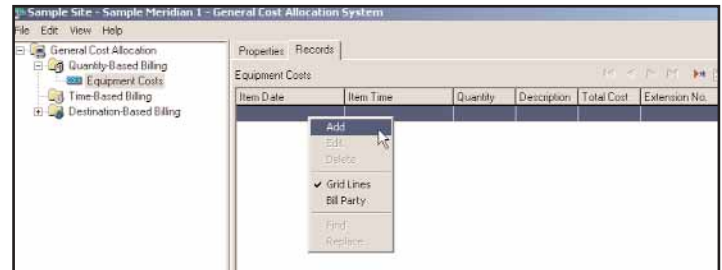


Figure 5.

By clicking on the **Apply/New** button in the **Record Editor** as shown in **Figure 6**, you can add many records quickly. Use the **Total Cost** box for adding the Equipment Cost. When finished, click **OK**.

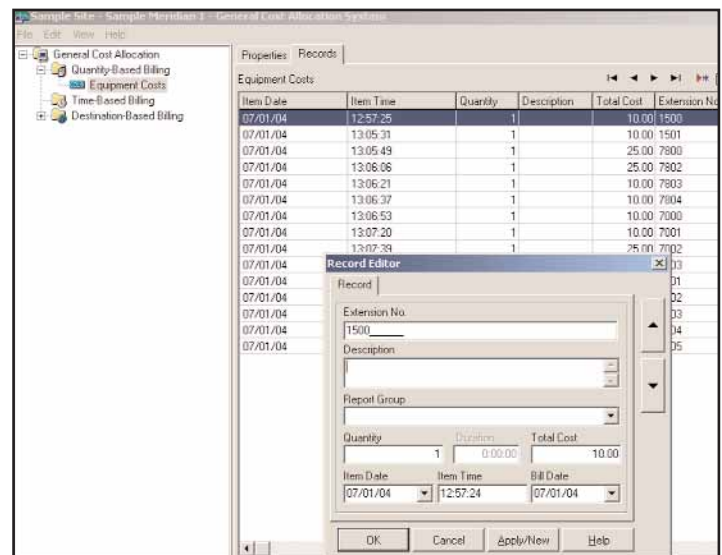


Figure 6.

Continued on page 3 - Allocating

Allocating - continued from page 2

3. Provided that you have a properly configured and working TBS module, with records collected and costed, return to the System Window as shown in **Figure 1** and launch the CRS to run a report that will include all charges. When opened, the following screen in **Figure 7** will appear.

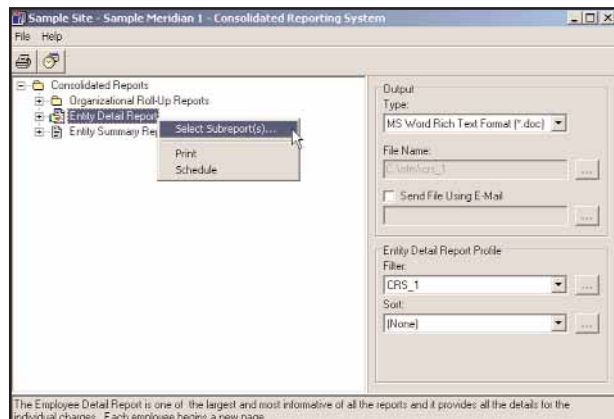


Figure 7.

In the left pane, you can choose between a detail and summary report. The example selects the **Entity Detail Report**. Highlight, right-click, and proceed to **Select Subreport(s)**. The screen in **Figure 8** will appear. The **Available Applications** pane will show the applications that have available data. Use the arrows to move the applications over to the **Selected Applications** pane. Then click the **OK** button to take you back to the main CRS screen.

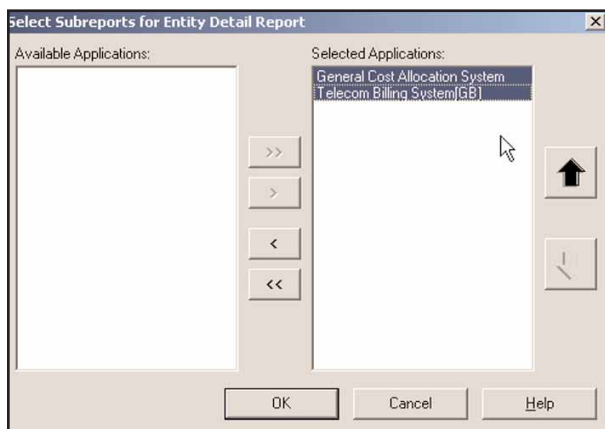


Figure 8.

Next, click on the ellipsis next to the **Filter** box in the **Entity Detail Report** File section to create a filter for the report as in **Figure 9**. Many times this will be a monthly report so click on the **Bill Date** tab and enter a range of dates in the **From** and **To** sections. Also, use the **Organization** tab to select the departments

that you want to have included in the report. The example shows an entire division, Schaumburg, as being selected.

When finished configuring the filter, click the **OK** button, and return to the CRS screen in **Figure 10**. Use either the Print or Schedule icon to run the report.

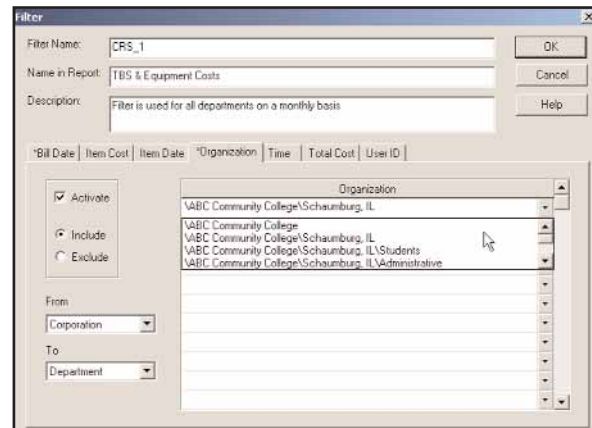


Figure 9.

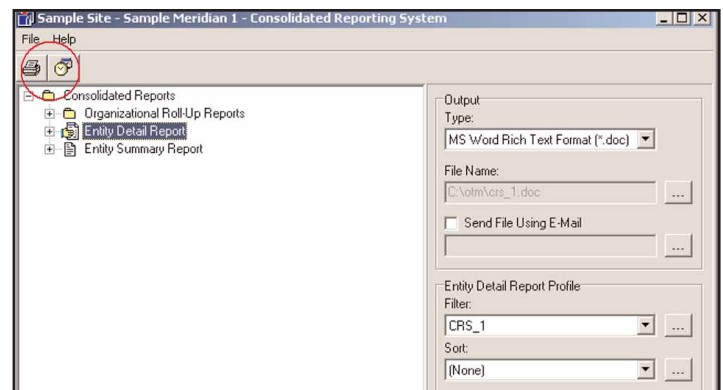


Figure 10.

The figures below show a sample of the report for extension 7800. **Figure 11** shows the GCAS Equipment Cost of \$25.00 while **Figure 12** shows the TBS portion for \$9.00. **Figure 13** shows the combined CRS total cost of \$34.00.

There are many other ways to configure GCAS to allow you to define and assign extra costs. With a little practice it is easy to adapt the software to meet your requirements.

Continued on page 4 - Allocating

Allocating - continued from page 3

Sample Site - Sample Meridian 1
Entity Detail Report
TBS & Equipment Costs
Printed: 12:13 Jul 30, 2004

Byrd, James
ABC Community College / Schaumburg, IL / Students

General Cost Allocation System

Bill Type: Equipment Costs

Extension No.	Date	Time	Quantity	Cost
710004	1305		1	25.00
Totals:			1	25.00

Equipment Costs	Cost	Tax	Amount	Tax	Amount	Tax	Amount	Tax	Amount	Total
Equipment Costs	25.00									25.00
Total Cost										25.00
Total with Taxes										25.00

Figure 11.

Telecom Billing System

Ext: 7800

Date	Location	Direction	Date	Time	Dur	Cost	Route	Comment
1760239-5621	RAWONA	CA L52	Outgoing	Oct 28 2002	15:17	2.50	0.03 27	Long Distance
1760239-1234	RAWONA	CA L52	Outgoing	Oct 14 2002	12:42	14.06	4.49 27	Long Distance
90585222			Incoming	Oct 14 2002	17:03	2.30	0.00	
90585222			Incoming	Oct 19 2002	14:31	.32	0.00	
90585222			Incoming	Oct 19 2002	17:14	2.30	0.00	
90585222			Incoming	Oct 21 2002	15:53	.32	0.00	
416 777-2222	TORONTO	ON F50	Outgoing	Oct 22 2002	15:29	4.50	0.57 27	Local
1760239-9812	RAWONA	CA L52	Outgoing	Oct 14 2002	11:36	2.00	0.62 27	Long Distance
1940394-9994	DENTON	TX D50	Outgoing	Oct 29 2002	11:41	.38	0.02 27	Long Distance
416 522-1111	TORONTO	ON F50	Outgoing	Nov 12 2002	10:09	11.25	1.36 27	Local
19082364888	LEBANON	NJ D50	Outgoing	Oct 29 2002	9:43	1.01 30	1.24 27	Long Distance
416 777-2222	TORONTO	ON F50	Outgoing	Oct 29 2002	19:23	3.20	0.45 27	Local
1940394-3333	DENTON	TX D50	Outgoing	Nov 1 2002	10:54	10.36	0.22 27	Long Distance
8105889990			Outgoing	Nov 2 2002	18:12	2.06	0.00	
8105889990			Incoming	Nov 5 2002	13:14	.32	0.00	
905299990			Incoming	Nov 9 2002	14:20	.05	0.00	
90585222			Incoming	Oct 28 2002	11:55	2.30	0.00	

Ext	CostField	INCOMING	OUTGOING	TOTALS
		Calls	Duration	Cost
7800	Long Distance	0	.00	0.00
7800	Local	0	.00	0.00
7800		7	9:12	0.00
7800		10	15:408	9.00
Total Number of Calls: 17		Total Minutes: 12333		Total Cost: 9.00
				Total with Taxes: \$9.00

Figure 12.

Consolidated Billing Entity Summary

Component	Cost	Taxes	Total
General Cost Allocation System	25.00		25.00
Telecom Billing System (06)	9.00		9.00
Total			34.00
Grand Total			\$4.00

Figure 13.

Current OTM Patches

Nortel has released 21056su1, a comprehensive patch for OTM version 2.10.56 that is considered the minimum patch level for this version going forward. Below is a listing of items fixed by this patch. Patches are also available for OTM versions 2.00.50 and 2.01.37. Per Nortel, OTM version 2.2 is scheduled to be released later this Fall.

- Q00773522** Report Generator missing values assigned to AST feature
- Q00597841** Traffic data collection task launched from the scheduler hangs
- Q00626491** Product improvement on OTM-DECT Serviceability DECT Performance
- Q00716112** Unable to synchronize attributes between OTM and Novell NDS
- Q00738608** Transmission of RPL records incomplete if one set gets SCH
- Q00743504** The scheduled task on French/German end userpage is not executed on time
- Q00745767** Maintenance Windows PE Units displays Status with TBUG613
- Q00746169** Display wrong number of Intrazone call made in Intrazone etherset data report
- Q00746432** Retrieving PCA set in OTM does not fill in the HOT_P key information
- Q00746847** DN not updated in Employee Editor if set has DN configured on key1 or above after a parse
- Q00757720** Cannot change language in CPND Name
- Q00758289** OTM does not NULL Key 27 or Key 28
- Q00758289-01** SCH1370 on keys 27 and 28 when running x11 25.30
- Q00764449** Traffic data collection/parsing task launched from the scheduler
- Q00765138** System Terminal configuration problem on Branch Office
- Q00773522** Report Generator missing Values assigned to AST Feature
- Q00789147** SCH1206 when we tried to RPL the set
- Q00797489** OTM Traffic Processor Load Report:Hour of MaxRTUvalue not available above RIs 24
- Q00800351** Cannot perform LDAP synch with Windows Server 2003 Active Directory
- Q00812495** Remove the DECT's dependency on VeriSign certification.
- Q00813988** Unable to Merge previous release of Traffic Db to OTM 2.10.56
- Q00821980** PUA feature does not work when Machine type is Succession
- Q00832217** Maintenance mode auto sync dialog not popped for cpnd changes

Continued on page 5 - OTM Patches

OTM Patches - continued from page 4

- Q00836589-04** Changing SNMP Community String Names does not prevent access using default names
- Q00836777** Scheduler hangs when traffic parsing
- Q00839332** Modem is not disconnected when the parse begins
- Q00843522** Wrong site accessed when using VT220 from OTM
- Q00845632** Cannot change CLS from TDD to ADD
- Q00857365** Scheduled Jobs to PBX fail after upgrade to 2.10.56
- Q00879139** LDAP sync doesn't show correct Danish characters for Active Directory

In addition to the above, there is also a correction to the Traffic module with Q00813988. Previously, the software was unable to merge Traffic data from a previous release into the OTM 2.10.56 Traffic database. The patch includes a utility that allows you to convert prior OTM Traffic archives into 2.10.56 format.

After installing the 21056su1 patch, go to the main Traffic window and click on the **Maintenance** menu and open the **Traffic Database** to view the **Database Maintenance** screen as seen in **Figure 1**. Then click on **File** and proceed to **Update Archive**. As shown in **Figure 2**, use the first box to designate the OTM version of the older, saved Traffic archive file. The example shows 2.00.50. Then use the second box to select the location of the older archived file. In the third box, provide a new location and file name for the updated archive file. Then click the **OK** button.

When the process has completed, you will be able to restore the newly archived file into the 2.10.56 Traffic database. Simply, return to the Database Maintenance screen, click on **File** and go to **Merge**. This is shown in **Figure 3**. Enter the location of the new file in the Source box as shown in **Figure 4**, and click the **OK** button. You will now be able to run reports on older data without corruption.

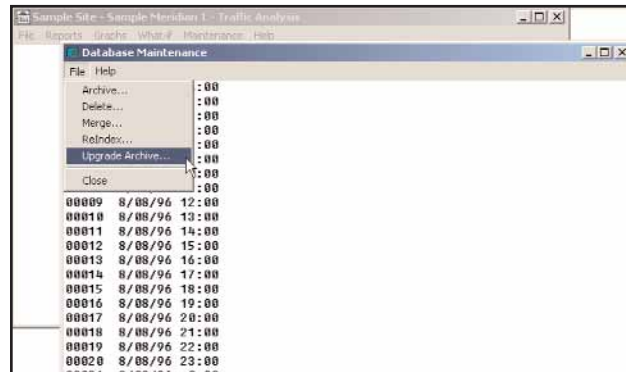


Figure 1.



Figure 2.

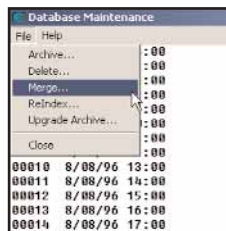


Figure 3.

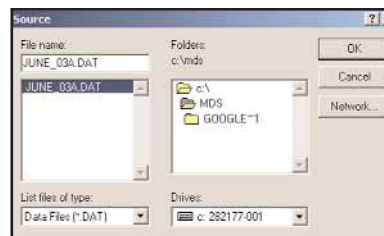


Figure 4.

OTM Integration - continued from page 1

Infotel Select is integrated with OTM in both CDR collection and directory administration. Specifically:

- ♦ Infotel Select can retrieve call detail records from one or more Meridian 1 or Succession PBX's through OTM. This eliminates the need for buffer boxes and offers high-speed network data collection.
- ♦ Infotel Select can automatically interface with Nortel's OTM directory. We can retrieve, on a scheduled basis, updates on all directory information including names, stations and organizational information. This information can be swept into Infotel Select to maintain the Infotel Select directory.

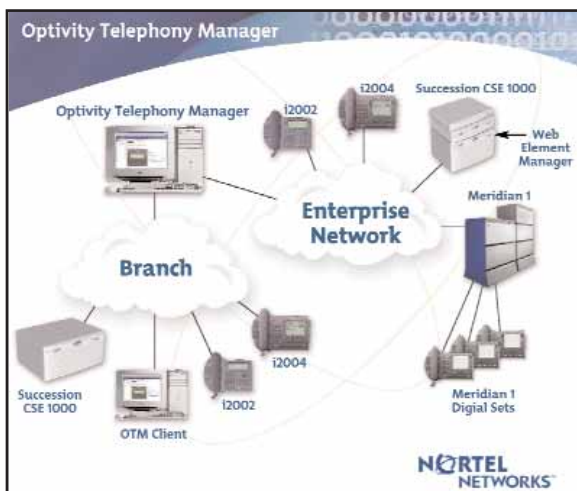


Figure 1.

How it Works

ISI takes advantage of a feature in Nortel Networks systems known as Data Buffering and Access (DBA). Under DBA, OTM can retrieve call data from all of your Nortel PBX's. Every fifteen minutes, the PBX contacts the OTM PC. It writes the information directly to the hard drive of the OTM PC. It supports multiple PBX's in one OTM implementation. Infotel Select retrieves this information directly from the OTM platform over your LAN.

Additionally, on a scheduled basis, OTM will export files containing all of the defined extensions and organization information. Infotel Select will automatically import these files and update the definitions for reporting. With this update, OTM becomes a single point of entry for programming your PBX's and your call accounting. Since OTM supports integration to corporate LDAP directories, it is now possible to have a single point of entry between your corporate directory, OTM, and Infotel Select.

Fault Tolerance

The ISI interface is fault tolerant. If the link between OTM and Infotel Select goes down, OTM will buffer call records. Since call records are stored on the local hard drive of the OTM PC, literally millions of call records can be buffered.

If the link between OTM and the PBX goes down, call records are buffered at the PBX itself. It should be noted that the lower end PBX's, such as the Option 11C, buffer call records locally in flash memory. Thus, they have a storage capacity of fewer than 1000 records. For extended storage, ISI recommends a PCMCIA memory card. These cards can expand local storage dramatically. For information on these cards, contact your Nortel Networks distributor.

OTM Requirements

This interface works with the General Package with minimum TN and RU licenses. No special modules are required. The interface works with the Enhanced and Premium packages as well. Please note that the Telecom Billing System (TBS) software is **not** required.

Availability and Pricing

The Nortel OTM interface is available immediately. We offer two configurations based on the number of extensions tracked. The first model is for PBX's with up to 250 stations while the second model is for PBX's with greater than 250 extensions. A copy of the interface is required for each PBX tracked. For pricing, please consult the appropriate ISI price lists.

Read-Only Access for OTM Web Station Administration

Customers frequently request that we configure a "read-only" login for both Windows and Web access to OTM Station Administration. This eliminates the possibility of corruption from inexperienced users who otherwise may inadvertently destroy vital programming. They are only allowed to view, and are not allowed to change keys or features, or transmit anything to the PBX. The steps below detail how to configure this in the OTM.

1. From the OTM Server or Client, open the Security menu at the main OTM Navigator window, and proceed to User Groups as shown in **Figure 1**.

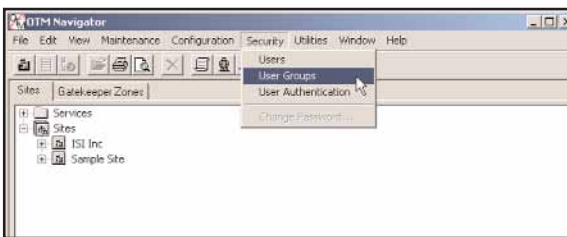


Figure 1.

2. From the User Groups **Configuration** menu, add a user group. The example in **Figure 2** shows a Read Only entry. Use the "Root" tree pane to allow or disallow access to Windows and Web applications. The example shows **No Access** to Windows and Web applications, except **Read-write** access to **Web Station** under the **Navigator** heading. With the present version of OTM, 2.10.56, this configuration is required to allow the read-only user to access the desired system(s). Additional programming detailed below in **Steps Four and Five** via the Web Administrator will secure read only status.

Repeat the process under the **Sites** heading for **Web Station Admin**. Set to **Read-write** access as in **Figure 3** below. When finished, click on the **OK** button.

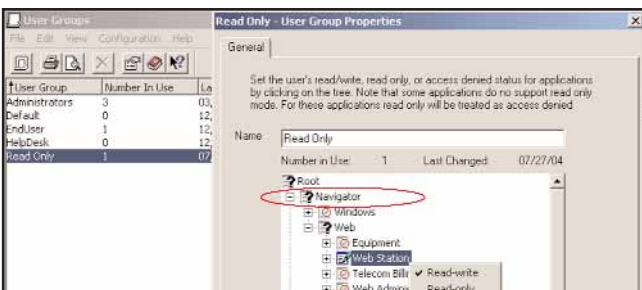


Figure 2.

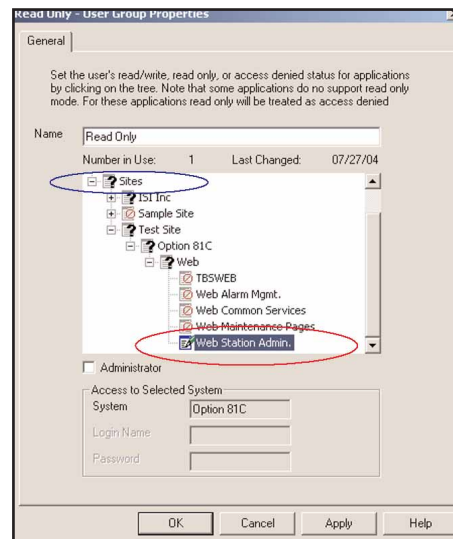


Figure 3.

3. Return to the main OTM Navigator window, re-select the Security menu and choose **Users**. From the Configuration tab, choose **Add User** and create a Read-Only entry.



Figure 4.



Figure 5.

Create a **Login Name** and password, and assign to the Read Only User Group that was created in step two above. When finished, click on the **OK** button.



Figure 6.

Read-only - continued on page 8

Read-Only continued from page 7

4. Open an Internet Explorer session to the OTM Server by addressing <http://OTMServerName/Admin>. When the OTM splash screen appears as in **Figure 7**, click on the logo. Login with an Administrative account as in **Figure 8**. Proceed to **Web Administration - User Groups** as in **Figure 9**. Highlight the Read Only entry, and click the **Edit** button to open.



Figure 7.



Figure 8.

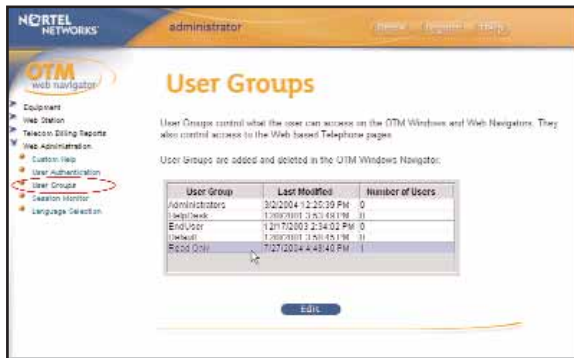


Figure 9.

Note in Figure 10 that the Web designations under the Navigator tab for Read-write Access should be the same as they were configured in step two above.



Figure 10.

5. Click on the **Telephone** tab as shown in **Figure 11**. Under **Options**, configure the **User Sync Options** so that the **User cannot sync changes**. Also, leave unchecked the **Allow user to restore pending changes** box. Then, note the additional tabs for **General, Keys, Features** and **Details**. In the **General** tab, leave unchecked the **Page is Read/Write** box.



Figure 11.

In the **Keys** tab as shown in **Figure 12**, note the encircled item. There are no Keys selected that could be changed by a Read-Only user.



Figure 12.

Read-only - continued on page 9

Read-Only - continued from page 8

In the Features tab shown in **Figure 13**, the features can be configured so that they are Hidden, Read Only or Read Write. ReadWrite is the default. Features should be set to Read Only.

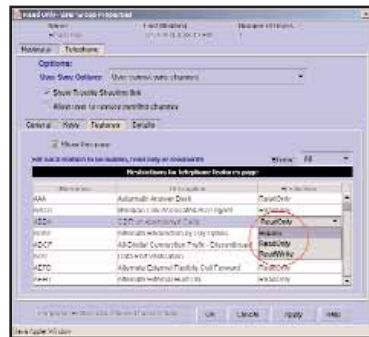


Figure 13.

In the Details tab shown in **Figure 14**, check the **Show this page** box.



Figure 14.

6. Verify the new settings by opening a new Internet Explorer session to the OTM Server by addressing <http://OTMServerName/Admin>. This time use the Read Only login. Note that now, only the Web Station option is available as shown in **Figure 15** and that the only Site/System that is available is the one that has been configured for Read Only. In this example, it's the Sample Site/Sample System. Under the **Find Telephones** section, choose to find by **Prime DN** and click the **Find** button.



Figure 15.

A database similar to the one in Figure 16 will appear. Click on the Location field to open a station record as seen in Figures 17 and 18. The General, Keys, Features and Detail tabs should be available as Read Only and no transmissions to the PBX will be allowed.



Figure 16.



Figure 17.



Figure 18.

Web Help

Custom Help is available for Administrative Web users from the main OTM Web Navigator menu under the Web Administration tree as seen in Figure 1. Note that English has been highlighted from the language choices, although German and French are also currently available provided that they have been installed from the OTM installation CD.



Figure 1.



Figure 2.

Clicking on English opens the menu seen in Figure 2. The topics include:

- ♦ Applications that provides information regarding the Alarm Script Wizard, alarm setup and help
- ♦ Call Pilot information regarding on-screen messages
- ♦ Maintenance assistance as seen in Figure 3 that provides information and commands on:
 - Bchannels
 - CPU
 - Groups
 - I/O Ports



Figure 3.

- Loops
- PE Cards
- PE Shelves
- PE Units

- ♦ Overlay information that provides mnemonic details for each Meridian 1 overlay.
- ♦ SCCS that provides Symposium Call Center message information that includes severity, impact and recovery action. See Figure 4.

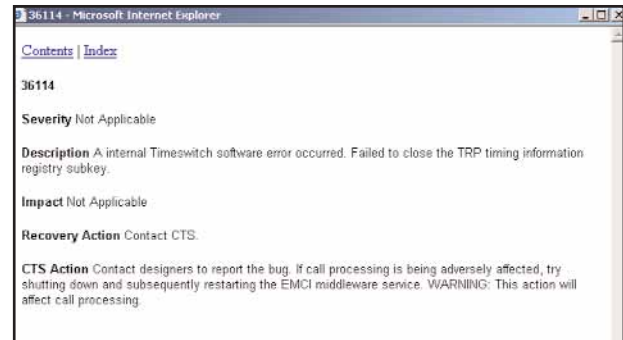


Figure 4.

- ♦ Station Features which provides information on feature and key mnemonics, telephone sets and keys, and telephone troubleshooting.
- ♦ System Messages that provides definitions to the many hundreds of Meridian1/Succession mnemonic messages.

Keep Connected with ISI

For past issues of **Keeping Connected**, please visit:
www.isi-info.com/solutions/solutions_keeping_connected.htm