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OTM Dongles

Please take note of the following so that there is no confusion regarding the ordering of dongles for the OTM software. OTM release 2.1 has expanded the dongle option to include a USB version. This is needed for certain types of server PC's (i.e. rack mounted units) that are not equipped with a parallel port.

Prior to release 2.1, a parallel port was mandatory to house the dongle for the software to operate. Occasionally, PCI add-on cards were installed to supply a parallel port on one of these machines, and frequently they caused problems or were inoperable.

Presently, with our pre-installation gathering process for ISI installation and training orders for OTM 2.1, ISI is finding that the incorrect type of dongle is being ordered from Nortel, and does not match the type of port available on the customer server PC. Parallel dongles require a hardwired parallel port off the motherboard of the PC. USB dongles require a fixed USB port on the machine.

Note: USB ports cannot be used in conjunction with a cable to fit parallel dongles.

It's important to take the time to coordinate with whomever is supplying the PC that will house the dongle. The dongle usually resides on the OTM Server, but could be installed on a stand-alone machine as well. This admonition is simply to help reduce delays as it takes additional time to re-order a replacement dongle from Nortel.

ISI Dealer Login

Access ISI's web site at www.isi-info.com for information about our OTM services. Click on the **Solutions** menu to access general information and our current issue of **Keeping Connected**, the OTM Newsletter. There is also a link for past issues.



Figure 1

Use the **Support** menu to access our Dealer Support services. Here you can download pricing for OTM and ISI services, access our Dealer Knowledgebase, and view or download the ISI OTM Training Class descriptions.

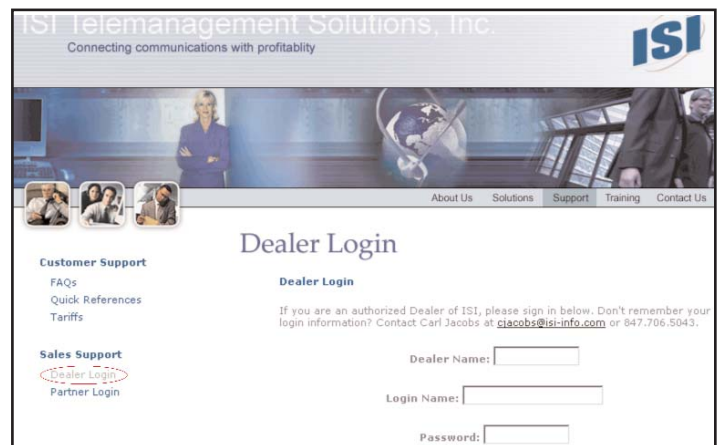


Figure 2

If you are an authorized Dealer or Partner of ISI and have not yet obtained a Login Name and Password, please contact **Carl Jacobs** at cjacobs@isi-info.com or call at 847.706.5043.

System Properties Network Menu

The Network menu allows the configuration of the following items in a Nortel Succession Communication Server 1000 environment. It can be accessed when the PBX is initially defined in OTM, or for existing systems, from the main Navigator screen by highlighting the System Window, right-clicking, and going to Properties. See Figure 1.

Zone - Use this dialog to manage Gatekeeper Zones for the network. The Gatekeeper helps route telephone calls over the IP network. There are sections to define a Primary and Alternate Gatekeeper. In the event the Primary Gatekeeper fails, the Alternate Gatekeeper acts as a backup and can resume the routing of calls on the network.

Primary Signaling Server - Define the TLAN IP address of the Primary Signaling Server. Then this device will be available from the OTM Navigator screen via **Element Manager** which is the resident software of the Succession Signaling Server.

Alternate Signaling Server - Define the TLAN IP address of the Alternate Signaling Server if one exists. This server will also be accessible with Element Manager.

Succession Branch Office - Define the IP address for any Branch Office. A Branch Office provides remote IP capability for IP phones at the Branch location and the Main PBX. If the Main Office fails to function, or if there is a network outage, the Branch hardware will assume the role of providing service to the Branch phones. This is for backup and survival purposes.

Survivable Media Gateway - Define the IP address for any Media Gateway cabinets that have been configured for survivability.

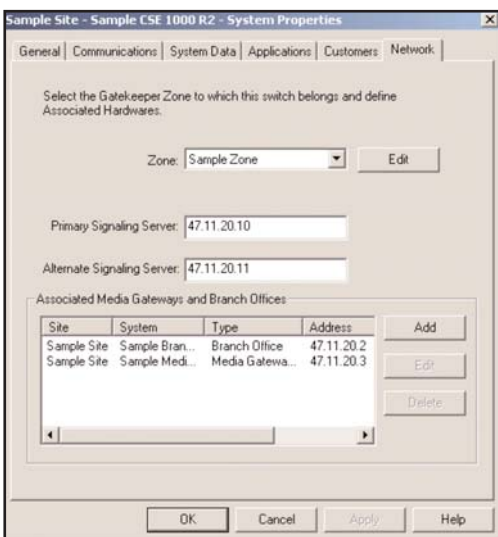


Figure 1

OTM Enhanced Premium Software Support Agreement Services for Telecom Billing System (TBS)/Call Tracking

While ISI's Premium Software Support Agreement offers customers unlimited remote operational assistance, its focus is more "reactive" in nature. Customers open trouble tickets with ISI's National Technical Assistance Center when issues or questions arise. ISI's Premium support services include instructing customers on how to perform basic administration functions, but do not include the actual administering of those tasks. Recognizing that our customers' "time is money," ISI offers an Enhanced Premium Software Support Agreement for the OTM Telecom Billing System and Call Tracking modules. The services in this agreement are over and above those included with Premium Software Support, with the focus on more "proactive" assistance and include performing administrative tasks.

- ♦ All coverage included with Premium Software Support
- ♦ Monitoring daily reports emailed to ISI, verifying call collection and processing.
 - Remote dial-in and trouble shooting for sites that have errors or problems with report delivery to ISI.
- ♦ Configuring and monitoring No CDR alarm, provided Call Tracking has been purchased
- ♦ Configuring and scheduling backups, working with the Customer's IT department to determine where backed up data/parameters should be placed and retained.
- ♦ Call costing administration
 - Includes global projects to change pricing structure at all locations
 - Includes miscellaneous pricing changes, i.e. assign a "special" pricing arrangement for a specific country, etc.
- ♦ Trunk Database updates (adding new trunks to TBS system), based on either call accounting reports or customer-provided trunk list
- ♦ Assistance with Directory Database administration
- ♦ Defining and scheduling of standard reports in system
- ♦ Loading of ISI-supplied rate tables into TBS system
 - Removes time/effort from customer's personnel
 - Ensures proper handling of the rate table updates
- ♦ Loading of software upgrades, which can be performed via remote access.

Using the TBS Surcharging Feature

The Telecom Billing System Surcharge feature has been available since OTM version 1.2 and allows more flexibility with applying costs. This feature allows the system to assign different classes of billing for extensions, authorization codes and account codes within a TBS Telephone Configuration. This is useful in such applications as Lodging or the Hospitality industry, or for Trade Centers, College Campuses, Municipal Centers, Accounting and Law firms.

The example below describes different setups for pricing at a college for Administrative users and students. Authcodes are used in this environment. Administrative users are charged three cents per minute for local calls and five cents per minute for long distance calls. The Students are charged 10 cents per minute for local calls and 30 cents per minute for long distance calls.

1. Create an Organizational Hierarchy

From the main Telecom Billing System window, select **Edit**, then **Organizational Hierarchy**. When the editor opens, click on the **Levels** tab in the left pane. There are three default levels as shown in **Figure 1**. You can add additional levels as needed, up to a total of 20.

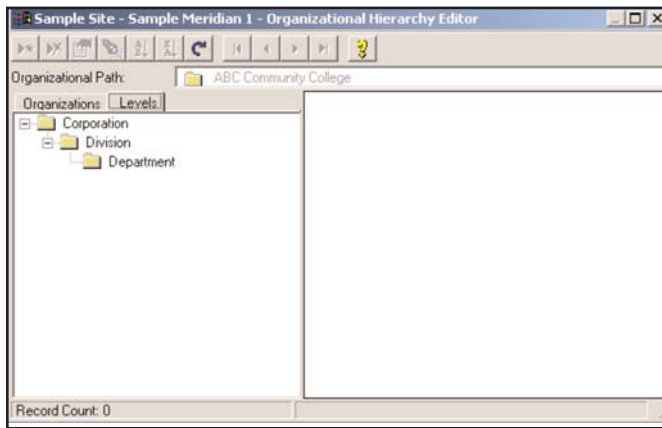


Figure 1

The example in **Figure 2** below shows how to build the hierarchy from the **Organizations** tab. The Corporate level is ABC Community College; the Division level is Schaumburg, IL; the Department levels are Accounting, Administrative, Executive, Human Resources, Sales and Students. After the hierarchy has been built, you can then assign users to their appropriate level by either dragging and dropping them from the right pane to the left pane in the Hierarchy Editor, or assigning them in the **Employee Editor** which can be accessed from the main TBS window under the **Edit-Employees** menu.

Note: This requires that the names be entered in the **Employee Editor** either manually or via a PBX download.

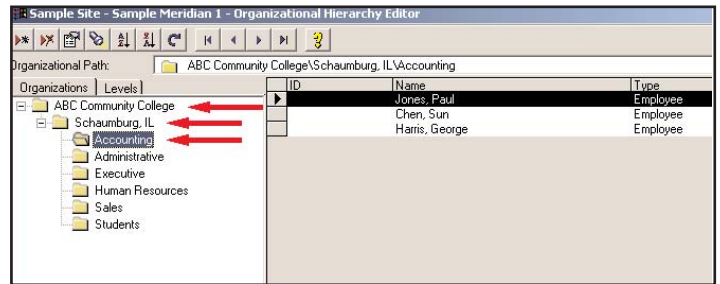


Figure 2

2. Prepare the Carrier Pricing Template

Although pricing can be administered completely from the Carrier Pricing template and normally is, a few adjustments are required to vary the pricing. Notice the third template for Long Distance in **Figure 3** below. The **Rate Filename** has been omitted so that the rate table pricing is **not** used for these calls. Also, as in **Figure 4**, there are no costing values for Cost/Minute, Cost/Call, Cost /Pulse or Percentage Cost Adjustment. However, make sure that the **Location Book** value is selected so that calls will be tagged correctly with City and State information.

Note: The **Location Book** is a component of the rate table. Please contact Carl Jacobs at ISI for more information regarding the purchase of a certified OTM Standard or Custom rate table. cjacobs@isi-info.com 847.706.5043.

Other templates may need to be omitted as well depending on the customer's requirements.

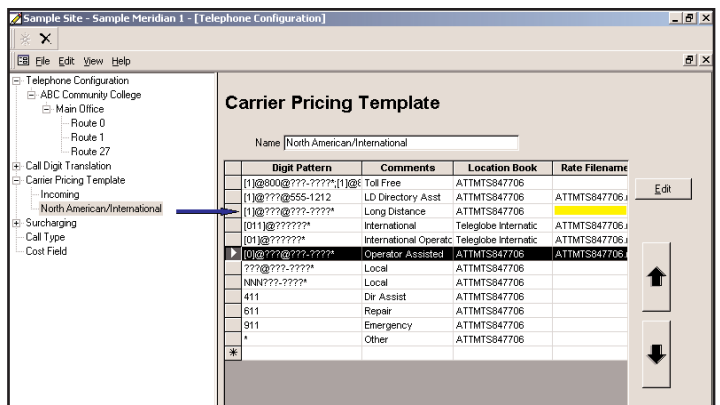


Figure 3

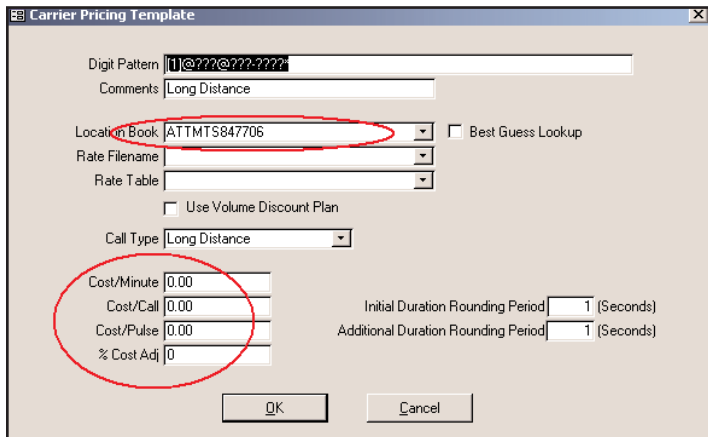


Figure 4

3. Create the Surcharging Profile

From the Telephone Configuration screen seen in Figure 5, highlight the **Surcharging** menu, right-click, and select **New Surcharge Group**. In the right pane under **Name**, create a description for this profile. Also, choose whether you want to identify the billed parties by using Authorization Codes, Extensions, Account Codes or a combination of the three. The example is using Authorization codes.



Figure 5

Next, highlight the new Surcharge profile, right-click and create a **New Surcharge Group**. Figure 6 below shows the two defined groups for **Administration** and **Students** in the left pane, and the **Members** tab in the right pane for the Administration group. Notice that the Administrative departments are included in this Surcharge Group. Another group will be created for Students. Use the down-arrow in the **Organizational Unit** section to select departments from the Organizational Hierarchy. Set the pricing or Surcharging

that you want to use for this group with the Surcharges tab as in Figure 7 below. Notice that the Digit Patterns for Local and Long Distance calls are included with the appropriate pricing per minute. These patterns adhere to the same rules that are used with the Carrier Pricing Template.

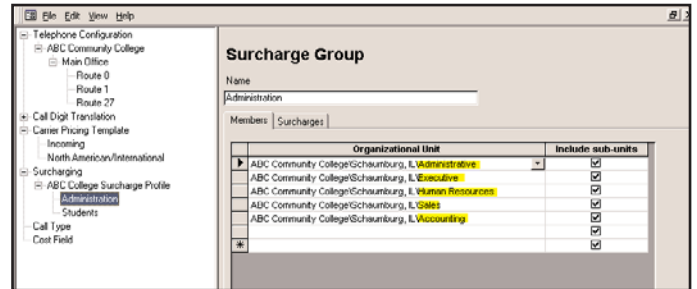


Figure 6

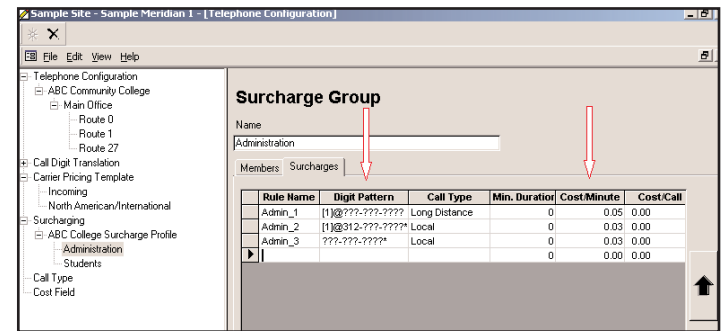


Figure 7

Next, create a **Students Surcharge Group** as in Figure 8. Note the Students department is the only entry in the Organizational Unit column.

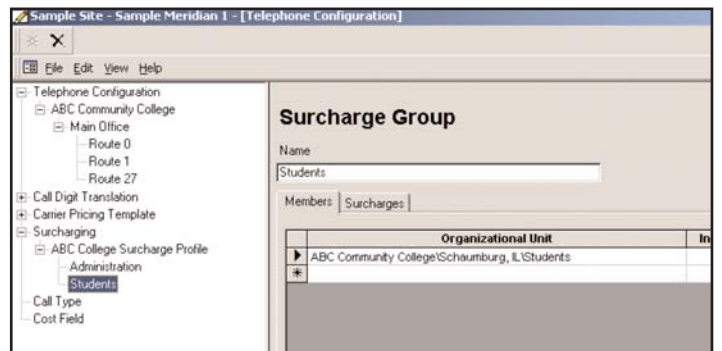


Figure 8

Next, click on the **Surcharge** tab in the Students Surcharge Group profile and enter the pricing for the Students calls as in Figure 9 below. The example shows that for local 312 area code calls and any 10-digit dialing, the charge will be 10 cents per minute; long distance calls will be charged at 30 cents per minute. Therefore, all students with assigned authorization codes will be charged these rates, whereas any administrative personnel will be charged the rates in Figure 7.

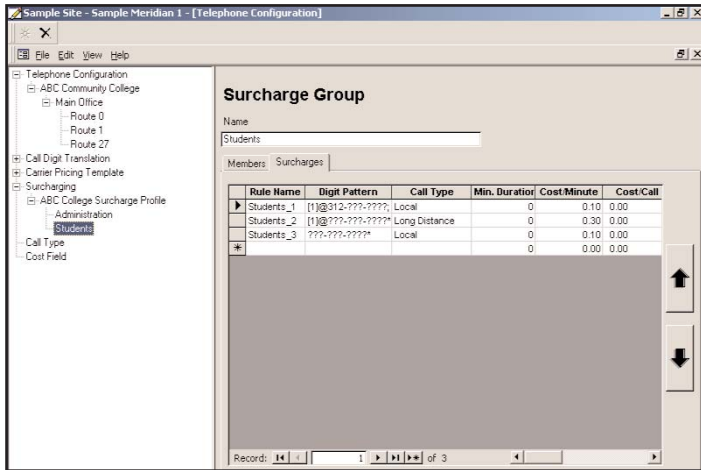


Figure 9

4. Assign the Surcharging Profile

After following the steps above, assign the new Surcharging profile in the current Telephone Configuration by clicking on the down-arrow as shown in Figure 10 below.

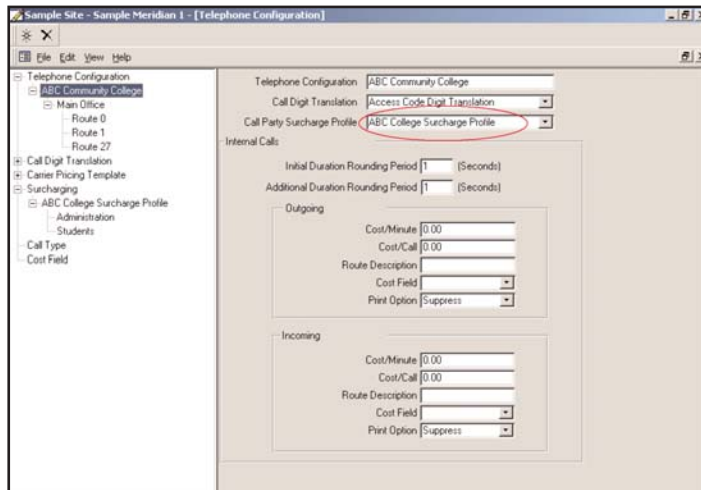



Figure 10

5. Cost /Recost and Run Reports

After completing the steps above, return to the main TBS window to cost or recost calls, and to run reports. Figure 11 below shows a sample Authorization Code Detail report. This was run for the fictitious student, James Byrd. For security purposes, the report does not reveal the codes themselves, but does show the users.

Note: Authorization codes need to be added as an asset to an existing record in the Employee Editor. This can be done either manually or imported using the import feature found in the System Window Utilities menu.



**Sample Site - Sample Meridian 1
Authorization Code Detail Report**

Printed: 10:31 May 12, 2004

Byrd, James
Organizational Position: ABC Community College \ Schaumburg, IL \ Students

Extension	Direction	Digit Dskd	Location	Date	Time	Duration	Cost	Route	Comment
7800	Outgoing	1 516 677 4466	SYOSSET NY D17	10/14/03	12:42	15:00	4.50	27	Long Distance
7800	Outgoing	1 312 263 1234	CHICAGO IL 003	10/14/03	11:36	10:00	1.00	27	Local

Byrd, James **Summary**

Cost Field	INCOMING			OUTGOING			TOTALS			
	Calls	Duration	Cost	Calls	Duration	Cost	Calls	Duration	Cost	
Local	0	0:00	0.00	1	10:00	1.00	1	10:00	1.00	
Long Distance	0	0:00	0.00	1	15:00	4.50	1	15:00	4.50	
	0	0:00	0.00	2	25:00	5.50	2	25:00	5.50	
Total # of Calls: 2							Total Minutes: 25:00		Total Cost: 5.50	
									Total with Taxes: \$6.50	

Figure 11

Keep in mind that surcharging can be either a substitute for pricing, or an additional cost which is added to charges that are already defined in the Carrier Pricing Template.

Windows XP

With OTM version 2.1, Windows XP can now be used as the operating system for a client, or a stand-alone OTM machine. However, note that multi-session is not supported. Two users cannot be simultaneously logged into a machine that is running OTM.

The current supported service packs for Windows XP are 1 and 1a. Nortel Networks advises that XP clients may perform slightly slower than Windows 2000 clients that possess similar hardware and software configurations. This is due to the nature of the Windows XP operating system.

Keep Connected with ISI

For past issues of **Keeping Connected**, please visit:

www.isi-info.com/solutions/solutions_keeping_connected.htm