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OTM Version 2.1

The OTM software version release 2.10.56 was released last October and is the upgrade for OTM version 2.01.50. Important new features include support for:

- Windows 2000 Service Pack 4
- A USB dongle
- 3.0 Succession Branch Office
- The Western Telematic Netlink Buffer Box for CDR and Traffic storage
- Improved Call Party Name Display (CPND) functionality

Many customers had asked about the support for Windows XP and are now able to run their OTM clients on this operating system. Another customer concern was that different versions of OTM required different Windows 2000 service pack levels. In the past, OTM version 1.0 was supported only with SP1; version 1.1 was supported only with SP2; versions 1.2, 2.0 & 2.01 were supported only with SP3.

When Service Pack 4 was introduced in June of last year, many customer network engineers insisted on the use of SP4 for security reasons, but, as stated above, the more recent versions of OTM would only be supported under SP3. Nortel has provided a Product Advisory Alert dated November 7th, 2003 in **Bulletin Number PAA-2003-0398** which details the proper procedures for installing OTM versions 1.2, 2.0 and 2.01 with Service Pack 4. Note that OTM versions prior to 1.2 are not supported with SP4. You must upgrade to a supported version of OTM. As the bulletin states, newer Microsoft patches and their compatibility with versions of OTM will be addressed in future product advisories.

Prior versions of OTM required the use of a parallel port to house the OTM dongle (security key). Many new PCs are being sold without a parallel port installed off the motherboard. Installers have unsuccessfully tried to substitute a PCI add-on card with a parallel port. Nortel supports only hard-wired motherboard parallel ports and now, with the release of OTM 2.1, USB ports, that are more common on new PCs. The USB port requires a USB dongle that is different from the parallel dongle. It is important, then, to coordinate with customers and educate them regarding the port options for the PC that they intend to use for their OTM Servers or stand-alone machines, to ensure the correct dongle is ordered. As stated in the Nortel 2.1 GRB, "with OTM 2.10 and later, only onboard (direct from the PC motherboard) ports, either parallel or USB, will be supported."

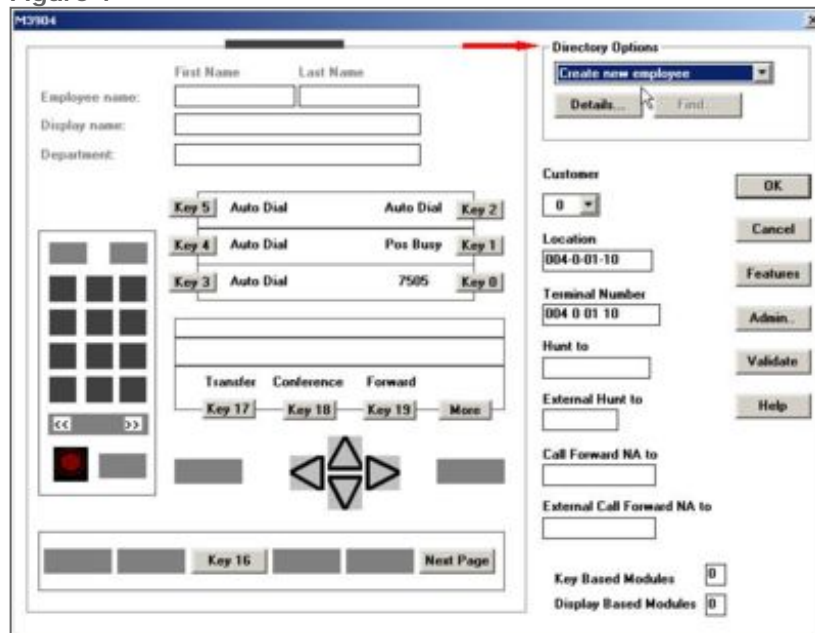
Script files have been included with OTM 2.1 to facilitate the usage of the WTI Netlink buffer box. This box can be polled serially via a direct-connect or modem, or via the customer's network to collect CDR and/or Traffic data. The Netlink is sold

with different memory capacities from 512K to 8M and is available through ISI.

The facilitation of names within OTM has been improved with better links between the Station Administration and CPND modules, and the Employee Editor. With a few clicks, a name can be added, deleted or modified and it will be updated in the three locations in OTM as well as the PBX. The example below in **Figure 1** shows the new interface for a station record in the Station Administration module. Use the **Directory Options** box to:

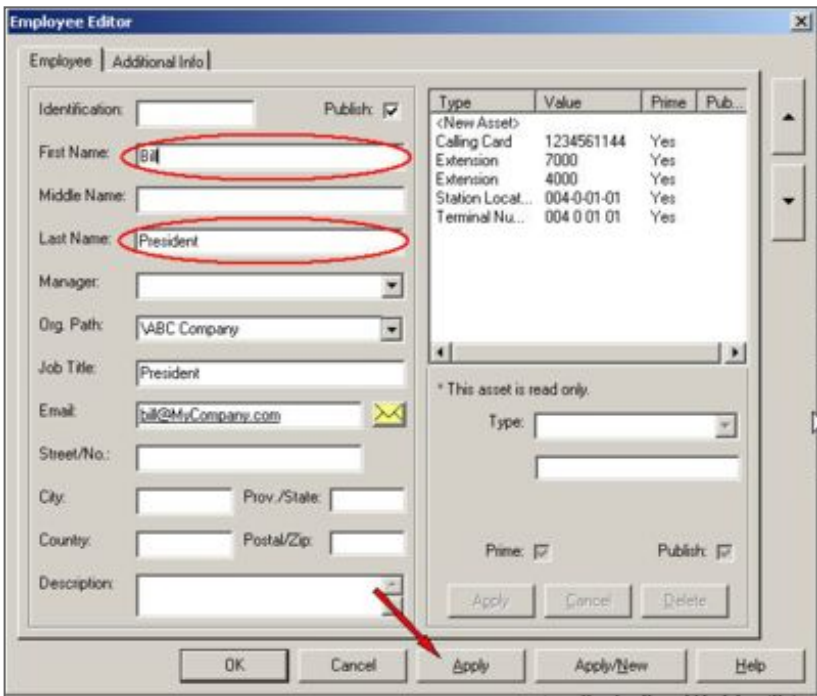
- Create a new employee
- Create a new role/project
- Assign a phone to an existing entity
- Unassign a phone to an entity

Figure 1



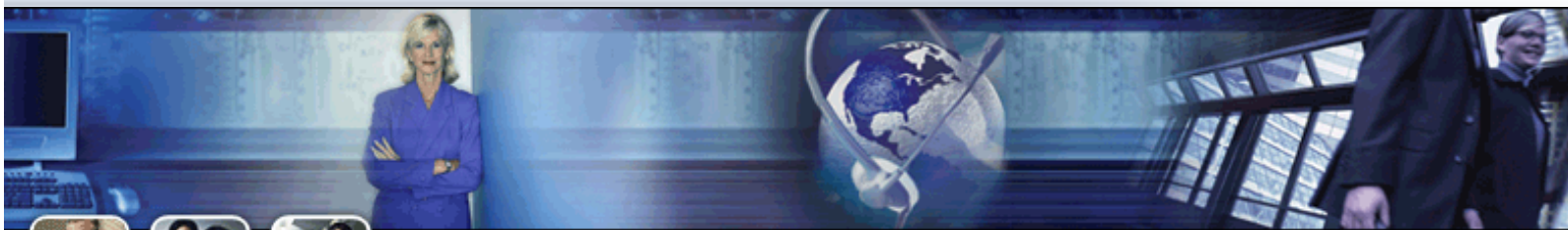
For a new employee, select the option in the Directory Options box, and click on the **Details** box. The following **Employee Editor** screen appears. Enter the information for First and Last Name and click on the **Apply** button as shown in Figure 2. Then, click **OK** to return to the main phone screen of **Figure 1**. Clicking **OK** on the main phone screen generates the Schedule box.

Figure 2



To assign a phone to an existing entity of the Employee Editor, use the **Assign to existing entity** option in the Directory Options box, and click on the **Find** button. Next, locate the record in the editor, then click **Apply** and **OK**. For this operation you will need to open the CPND module, click the **View** menu and go to **Pending**. Then highlight the record(s) that you have created and transmit them to the PBX.

To unassign a name to a phone, use the **Do not assign to an entity** option in the Directory Options box. This will blank out the First Name and Last Name boxes on the phone screen. Click **OK**. Note that this disassociates a name with a station record in OTM. It does not delete the name from the PBX. If you desire to delete the display name in the PBX, open the CPND module, click on the View menu, and proceed to **CPND Name**. Highlight the record to be deleted. If the Synch Status is set to **OUT**, you can transmit it to the PBX. If not, use the Delete key to change the status to **OUT**. You will then be prompted with the Scheduler box.



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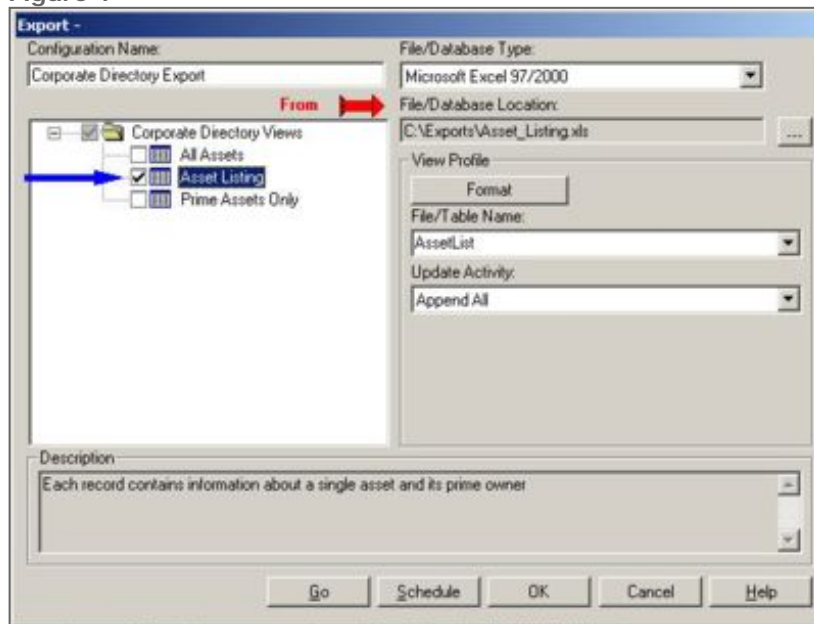
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Exporting of Corporate Directory in OTM 2.1

OTM 2.1 includes an improvement to the Corporate Directory Export utility, by providing **Asset Listing** information. This option is available under the **Corporate Directory View** as seen in **Figure 1** below and can be accessed from the **Utilities** menu under the System Window.

Figure 1



Once a **File/Database Type** has been chosen and a **File/Database Location** has been determined, click on the **Format** button to reveal the new Asset entries in the **Available Columns** pane. They are: **Asset ID**, **Asset Type**, **Asset Value** and **Asset Value 2**. These can be seen in **Figure 2** below. **Figure 3** shows where the asset values reside in the Employee Editor/Directory. They include values for Asset ID, Terminal Number, Extension and Location.

Figure 2

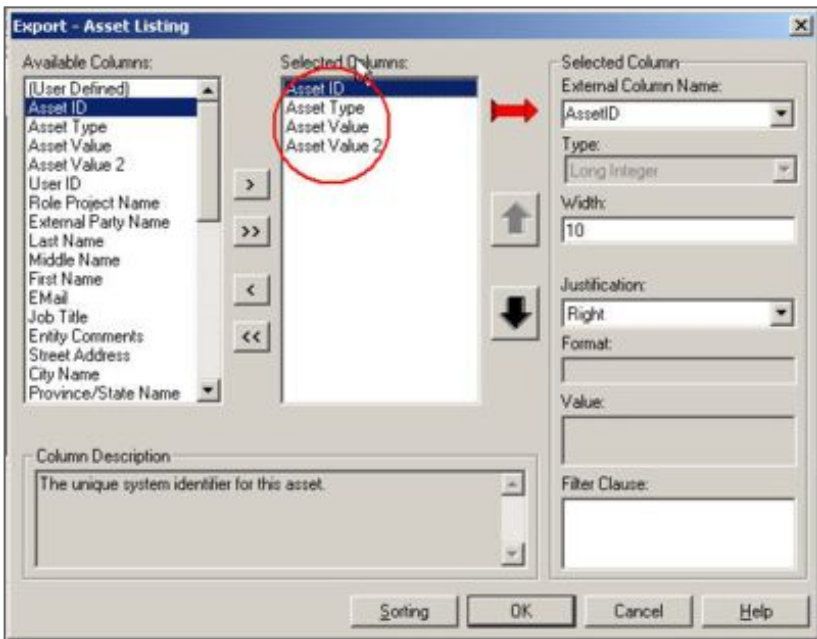
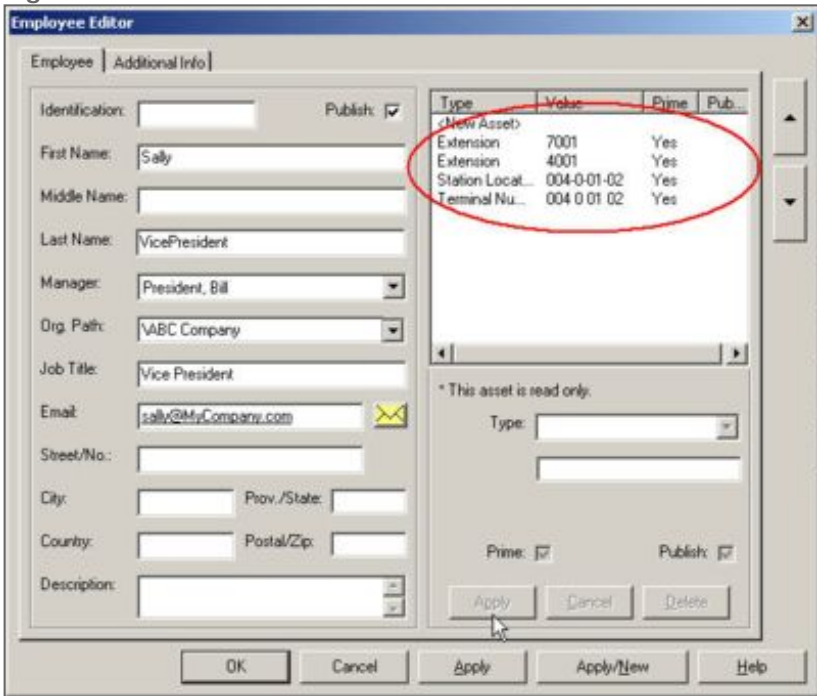
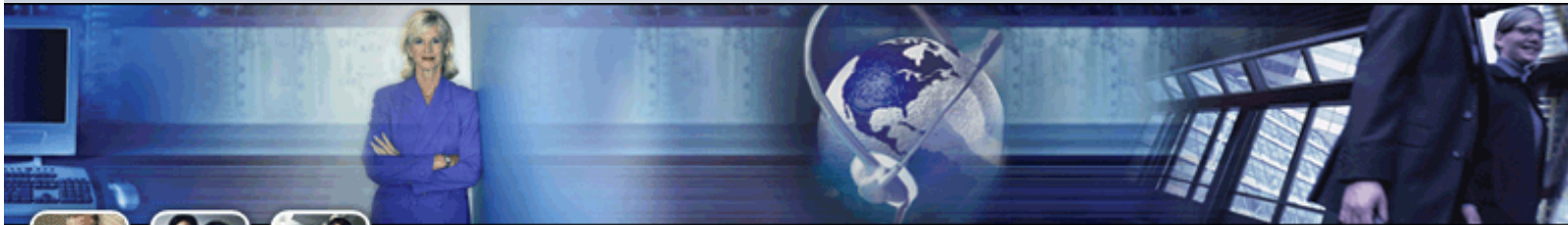


Figure 3





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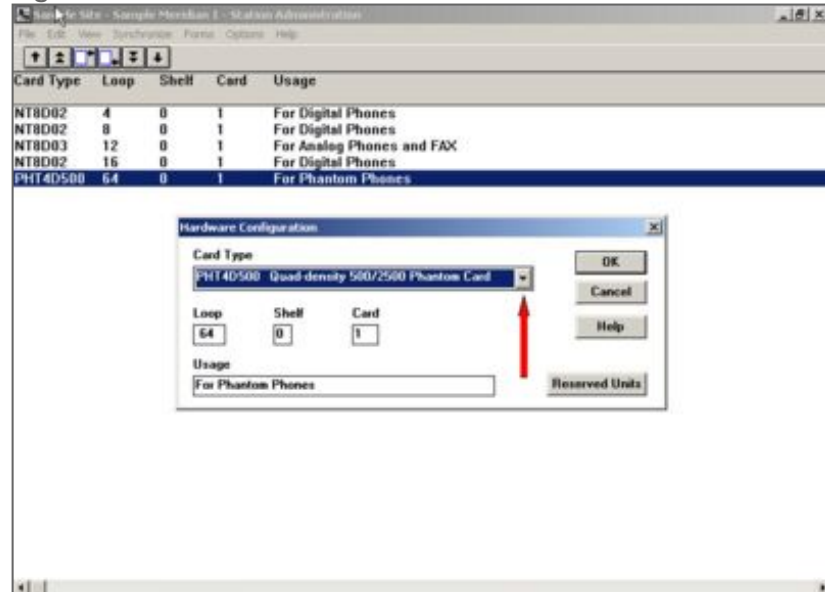
Creating Phantom Phones with OTM

There are many uses for Phantom phones on a Meridian 1 or Succession Communication Server for Enterprise 1000 system. By creating Phantom Terminal Numbers, administrators are allowed to configure them in software only and with a phantom Directory Number. There is no actual physical hardware. Calls that are made to a phantom DN are redirected to an existing phone via a set feature.

Feature Package 254 is required for phantom configuration. Note that only 500/2500 analog phones can be built on Phantom TNs, and they can only be assigned Single Appearance DNS.

For this to be operational, a Phantom Loop (Superloop) must be configured. This is processed manually via the PBX terminal in Loads 17 or 97. Note: The OTM Overlay Passthru, VT220 System Terminal, or the Web Navigator's Virtual Terminal Server can also be used for direct access to the PBX. In most cases a Superloop will be created in Load 97. Once the loop is created, and the virtual card is added in the OTM **Hardware** view, the TNs are available for assignment to Phantom phones in the OTM Station Administration module. This is shown below in **Figure 1**.

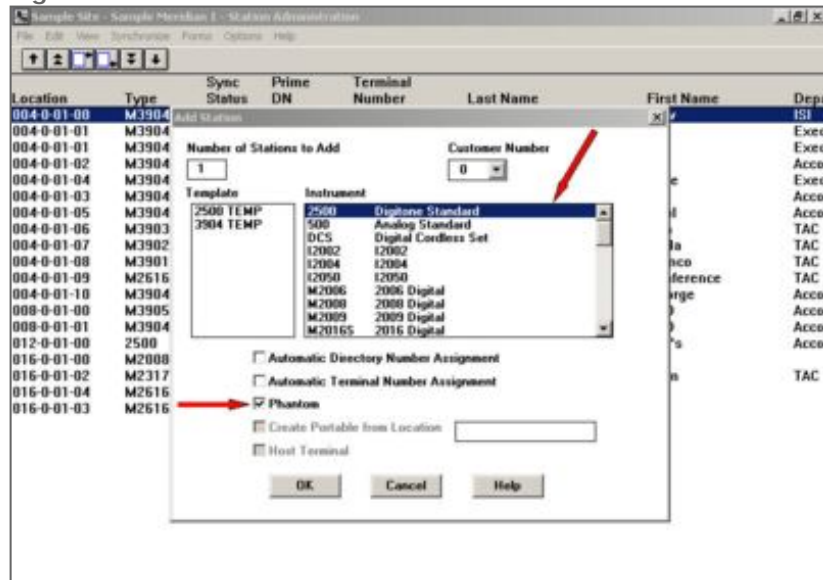
Figure 1



The virtual card must be recognized in OTM. Therefore, open the Station Administration module and click on **View**. Then proceed to the **Hardware** menu and click **Edit**, then **Add**. In the Hardware Configuration box as seen above in **Figure 1**, select the **PHT4D500 Quad Density 500/2500 Phantom Card** from the drop-down list. Also, enter the applicable **Loop**, **Shelf** and **Card** numbers for the address of the phantom card. The example shows Loop 64, Shelf 1, Card 0. When finished, click **OK**. This will make sixteen Phantom Terminal Numbers available in the Station Administration **Station** view for the creation of Phantom 2500 sets. To return to the Station view, click on **View > Station**.

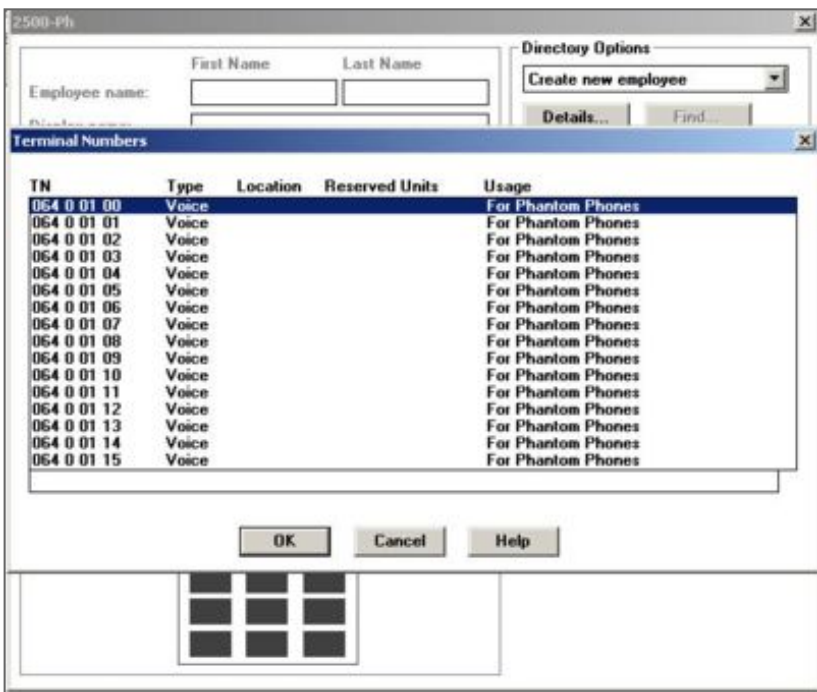
To build a Phantom set, click **Edit**, and then **Add**. Choose the **2500 Digitone Standard** as an Instrument to add, and check the **Phantom** box as shown below in **Figure 2**. Click **OK** to advance.

Figure 2



A phone view will appear where you must assign a TN, DN, Location, and Single Line features. Defining the name and department field is optional. Double-click on the **Terminal Number** box to display the TN list as shown below in **Figure 3**. Notice that **064 0 01 00** through **064 0 01 15** are available for assignment to phantom sets. Highlight and choose a TN, then click **OK**. Also, enter the Terminal Number in the **Location** box.

Figure 3

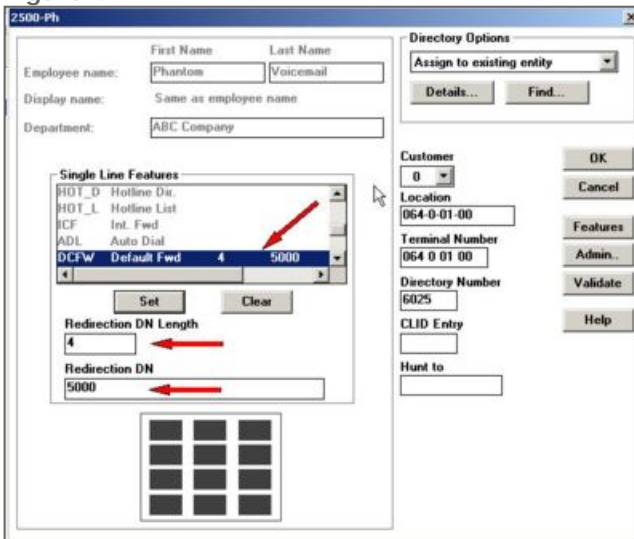


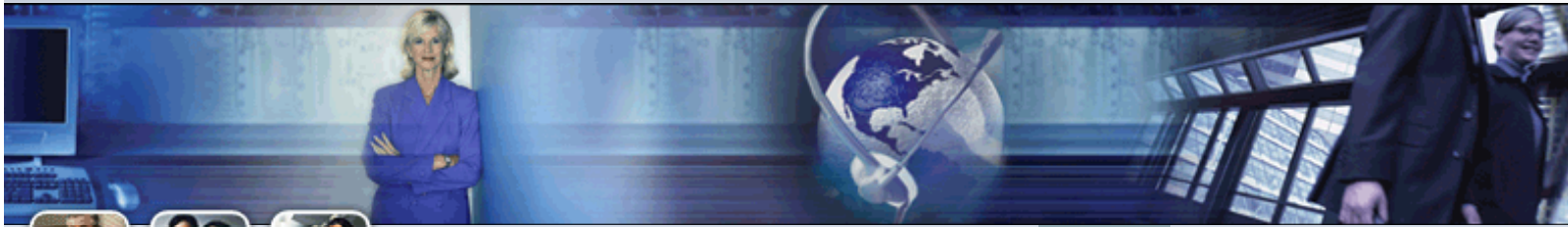
Following the TN assignment, provide a DN for the phantom set and assign a name via the Employee Directory by clicking on the **Directory** button. The last important task is to define the **DCFW** Single Line Feature. Use the Feature bar to scroll and highlight the **Default Forward** option as shown below in **Figure 4**. Click on the **Set** button and assign the **Redirection DN** length. The example shows four. Then, assign the **Redirection DN**. The example shows 5000. Click the Set button once again to assign the values and when finished, click **OK** and transmit to the PBX.

Someone calling extension 6025, whether internally or remotely, will immediately be connected to extension 5000, which in the example is the pilot number for the voicemail system. Another application could be for incoming 800 numbers that have DNIS. You could direct the DNIS number to the proper location.

Phantom Line sets can be handy, especially if cabinet space is at a premium and TN availability is low. They can help save real analog ports for actual phone sets or modem lines.

Figure 4





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M1 Patches

There are recent M1 patches available to correct the following items.

The first is generated at the console as:

```
PDT in Progress. Please Wait....Done!
```

```
ABORT (PDT_INTERNAL_ERROR_WRONG_SLOT_NUMBER
```

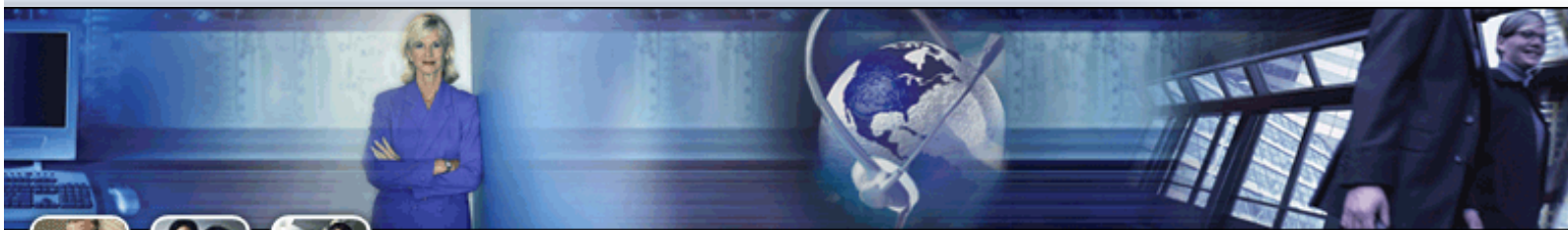
This affects systems using X11 Release 25.40B

It can be fixed by patch **#MPLR16648**.

Patch **#MPLR16464** corrects a problem regarding the addition of a key based module on a 3904 set in OTM. If you enter a "1" in the Key Based Module box and then transmit to the PBX, you can monitor the log window where it appears that the add-on module is created. However, this is not the case. The script file enters a "1" at the **KBA** prompt, and then a "0" at the **DBA** prompt, but this fails to create Keys 32 through 53. Therefore, when you try to assign values to the new keys, it errors out on transmission.

If the patch is not installed, you can build the add-on module manually from the PBX console by entering a "1" at the KBA prompt and then entering through the DBA prompt instead of entering "0".

Patch **P17575** corrects a problem with the M1 and Call Pilot where incoming calls to Call Pilot generate extremely long duration CDR records. The inaccurate call records also contain an incorrect date.



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TBS Filter Usage

Customers occasionally have difficulty with OTM TBS filter configurations in their attempts to run call accounting reports. Most report failures are attributable to improperly built filters. Below are examples of common reporting requests requiring the use of certain filters, with the correct way to configure the filters. **Figure 1** below shows the main TBS report page with the **Cost Analysis** tree expanded to the **Exception Chronological Report**. To the right is the ellipsis for filter creation and assignment. The example shows the **trunk** filter is being used for this particular report.

Figure 1

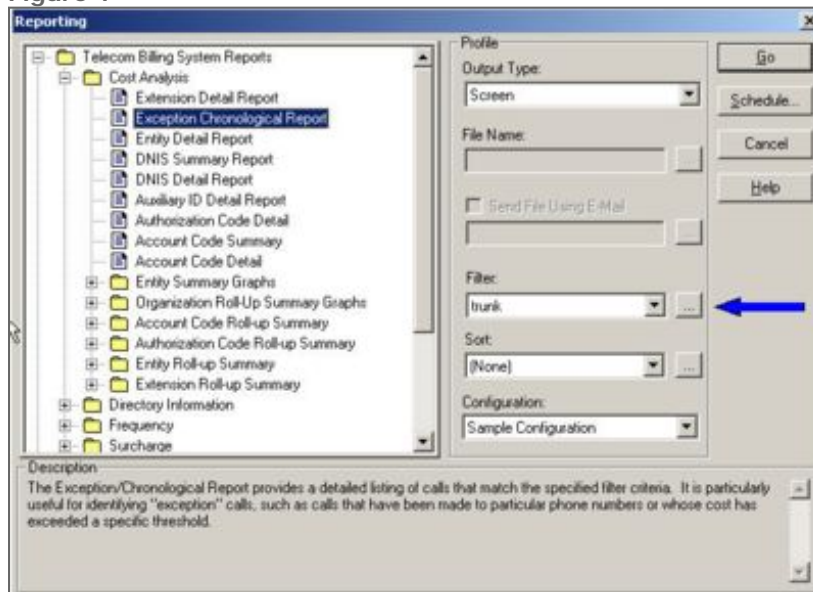


Figure 2 shows the layout for the trunk filter with the **Extension/Trunk** tab selected to include all calls that were outgoing and terminated on route 27. Note the **Low** and **High** values of **27001** and **27024**. These are the ranges that are defined in Telephone Configuration as depicted in **Figure 3**. **Figure 4** shows how they appear in the Call Database. Further note that the values must be entered into the filter as they appear in the Call Database. Use the other tabs to filter the date of the call (Call Date), Time, etc. **Figure 5** shows the resulting report.

Figure 2

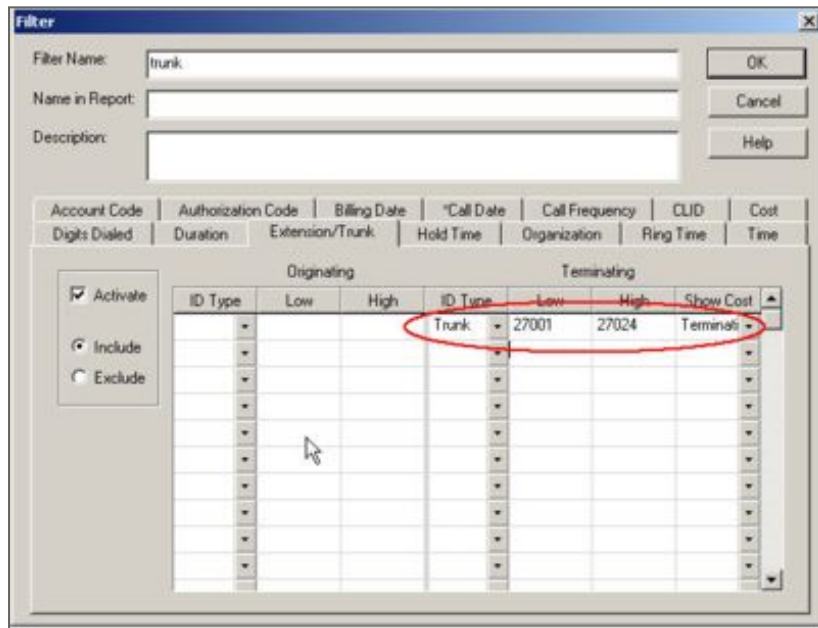


Figure 3

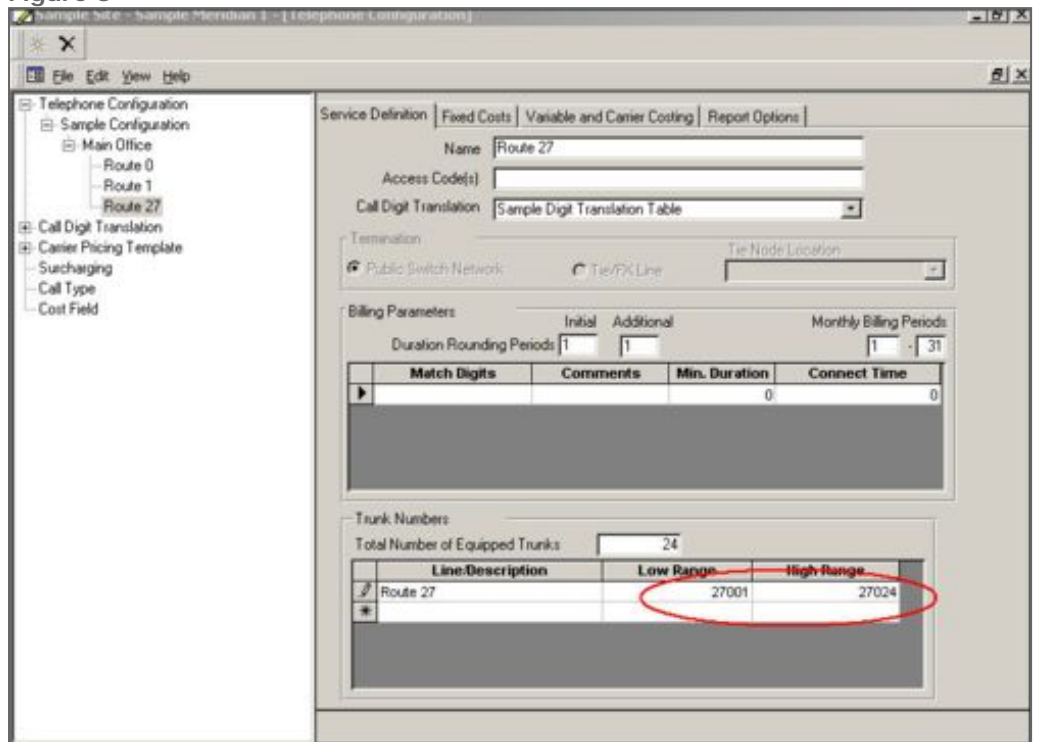


Figure 4

Sample Site - Sample Meridian 1 - [Call Record Editor]

File Edit Records Help

View: Collected Records Costed Records Filter by Configuration All Calls per Day

Rec. ID	Call Type	Orig	Orig ID	Term	Term ID	Date	Time	Duration	Digits Dialed	Location
120	Normal	Trunk	26014	Ext.	7001	10/14/02	10:12	2:16		
206	Normal	Trunk	26022	Ext.	7501	10/14/02	10:55	5:30		
212	Normal	Ext.	7504	Trunk	27020	10/14/02	11:36	5:00	58003493345	HICKSVILLE N
274	Normal	Ext.	7504	Trunk	27020	10/14/02	11:44	8:00	58005163492345	HICKSVILLE N
315	Normal	Ext.	7000	Trunk	27021	10/14/02	12:04	10:00	58005164454356	MINEOLA N
325	Normal	Ext.	7003	Trunk	27022	10/14/02	12:42	15:00	580015166774456	SYOSSET N
503	Normal	Ext.	7002	Trunk	27023	10/14/02	12:16	2:00	916315444356	KINGS PARK N
508	Normal	Trunk	26015	Ext.	7502	10/14/02	14:14	4:18		
568	Normal	Ext.	7503	Trunk	27018	10/14/02	14:19	2:00	912123356789	NEW YORK N
633	Normal	Trunk	26014	Ext.	7003	10/14/02	14:43	0:32		
715	Normal	Ext.	7505	Trunk	27023	10/14/02	15:13	2:00	916467786785	
918	Normal	Ext.	7002	Trunk	27020	10/14/02	15:34	2:00	917185575678	QUEENS NYC N
933	Normal	Trunk	26003	Ext.	7800	10/14/02	17:03	2:30		
1608	Normal	Ext.	7500	Trunk	27019	10/14/02	17:11	2:00	91917665546	
631	Normal	Ext.	7505	Trunk	27018	10/15/02	9:06	2:00	913156785568	LYSANDER N
1670	Normal	Ext.	7505	Trunk	27022	10/14/02	15:11	2:00	913473345678	
1766	Normal	Ext.	7504	Trunk	27017	10/15/02	9:44	2:00	915183325436	GLOVERSVL N
1766	Internal	Ext.	7400	Ext.	7504	10/15/02	10:30	0:12	00	
2130	Internal	Ext.	7400	Ext.	7504	10/15/02	10:30	0:12	00	
2155	Normal	Trunk	7001	Trunk	27021	10/15/02	13:09	2:00	918477065005	ROSELLE IL
2299	Normal	Trunk	26008	Ext.	7002	10/15/02	12:51	44:30		
2308	Normal	Ext.	7500	Trunk	27022	10/15/02	14:40	2:00	916308443357	AURORA IL
2308	Internal	Ext.	7800	Ext.	7001	10/15/02	14:45	0:46	00	
2308	Internal	Ext.	7800	Ext.	7001	10/15/02	14:45	0:46	00	
2344	Normal	Trunk	26004	Ext.	7503	10/15/02	14:57	1:00		
2548	Normal	Ext.	7001	Trunk	27020	10/15/02	16:27	2:00	912045678854	MINOTA NY

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Figure 5

Telecom Billing System Reporting - [Exception Chronological Report]

Sample Site - Sample Meridian 1
Exception/Chronological Report

Printed: 13:01 Jan 27, 2004

Extension	Direction	Digits Dialed	Location	Date	Time	Duration	Cost	Rate	Comment
7504	Outgoing	348-3345	HICKSVILLE	NY L61	10/14/02	11:36	5:00	0.10	Local
7504	Outgoing	516 348-2345	HICKSVILLE	NY L61	10/14/02	11:44	8:00	0.14	Local
7000	Outgoing	516 445-4356	MINEOLA	NY L61	10/14/02	12:04	10:00	0.17	Local
7003	Outgoing	1 516 677-4456	SYOSSET	NY L61	10/14/02	12:42	15:00	0.24	National
7002	Outgoing	1 631 546-4356	KINGS PARK	NY A62	10/14/02	12:56	2:00	0.15	National
7503	Outgoing	1 212 335-6789	NEW YORK	NY A62	10/14/02	14:19	2:00	0.15	National
7002	Outgoing	1 718 557-5678	QUEENS NYC	NY A62	10/14/02	15:34	2:00	0.15	National
7505	Outgoing	1 315 676-5568	LYSANDER	NY C63	10/15/02	9:06	2:00	0.06	National
7504	Outgoing	1 518 332-5436	GLOVERSVL	NY C63	10/15/02	9:44	2:00	0.06	National
7001	Outgoing	1 847 706-5005	ROSELLE	IL D65	10/15/02	13:09	2:00	0.06	National
7500	Outgoing	1 630 844-3357	AURORA	IL D65	10/15/02	14:40	2:00	0.06	National
7001	Outgoing	1 204 567-8854	MINOTA	MB F64	10/15/02	16:27	2:00	0.14	National
7001	Outgoing	1 306 335-4398	LEMBERG	SK F64	10/15/02	11:40	2:00	0.14	National
7503	Outgoing	1 450 663-7768	PONT WAU	QC F64	10/15/02	13:30	2:00	0.14	National
7001	Outgoing	1 242 302-6654	NASSAU	BA D65	10/15/02	15:13	2:00	0.06	National
7500	Outgoing	1 345 222-3322	CRYMCHIS	CI D65	10/15/02	11:28	2:00	0.06	National
7504	Outgoing	1 671 333-4456	FRINGATAN	GU D65	10/15/02	13:32	2:00	0.06	National

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Other tabs on the filter screen include Account Code, Authorization Code, Call Date, Call Frequency, Calling Line ID (CLID), Cost, Digits Dialed, Duration, Hold Time, Organization, Ring Time and Time.

Include a date range with the **Call Date** tab. Fill in the **From** and **To** boxes. For example, enter 10/01/2002 to 10/31/2002 for the month of October 2002. The date can also be entered as 10/01/02 to 10/31/02. Note that these fields are dependant on the PC's Regional Time and Date settings.

The filter shown below in **Figure 6** is configured to report on incoming and outgoing calls for only extension 5000. Note that there must be a separate entry defined for calls that are outgoing (Originating) and incoming (Terminating).

Figure 6

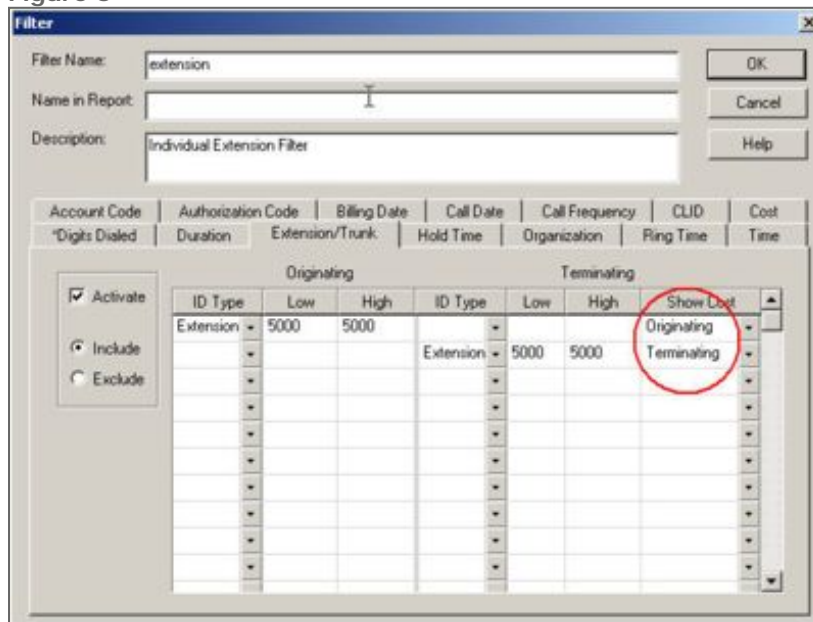


Figure 7 below shows a digits dialed filter that uses the ? wildcard to account for a four-digit access code in a CDR record, and then the digits of 12045671111. The *asterisk wildcard could be substituted for the four question marks, but note that a question mark is for one individual digit whereas an asterisk is for any number of digits. Observe the Call Database to determine how your digits dialed are being output from the PBX. The manner in which they are displayed in the Call Database is the way they must be defined in any digits dialed filter.

Figure 7

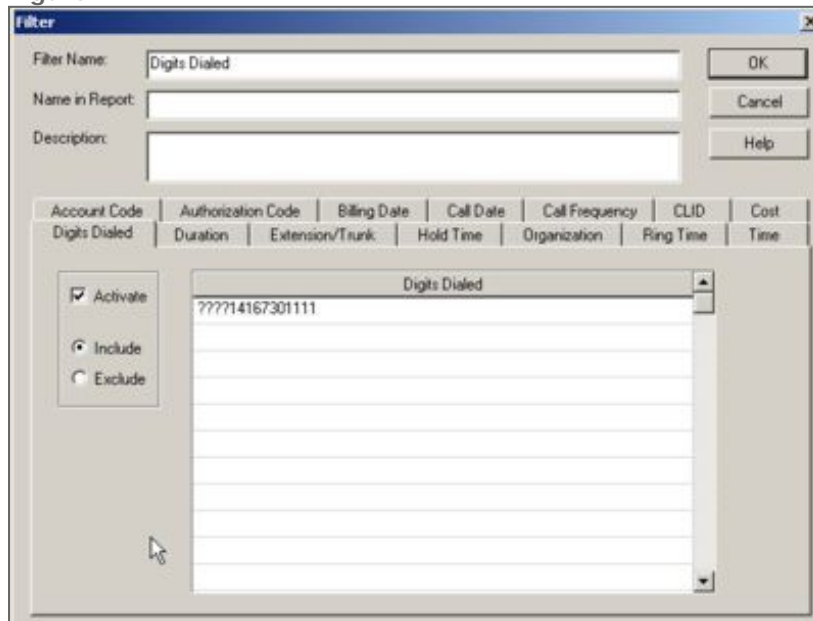
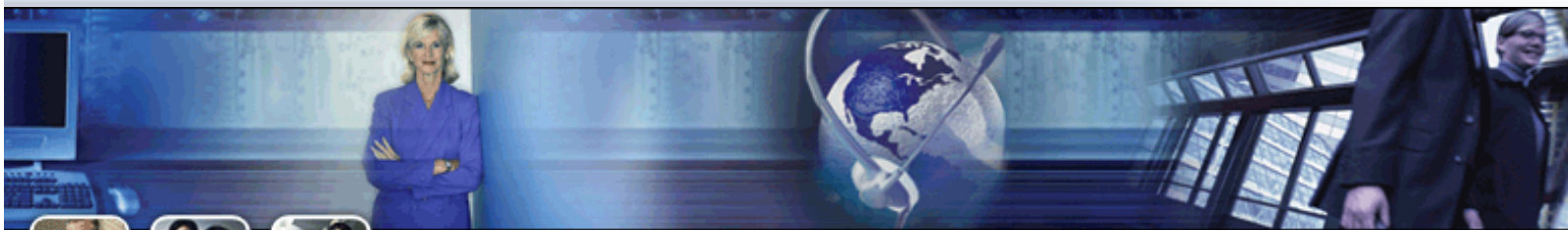


Figure 8 below shows a filter configured to report on calls for only the Accounting and Sales departments. To be able to utilize this organizational type of filter, the hierarchy information must be defined in the **Organizational Hierarchy Editor** and assigned in the **Employee Editor**. Each of these databases can be accessed from the main TBS window under the **Edit** menu. Many of the filter tabs can be used in conjunction with one another, but it's important to recognize that only calls that meet all the requirements will appear on a given report. Also, sometimes it is better to click on the **Exclude** circle to look for calls that do **not** match any of the tab settings. With a little practice one can become proficient in proper filter configuration and generate successful reports.

Figure 8



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Import Utility - Alternate Key

OTM 2.1 is now capable of using the Terminal Number as an **Alternate Key** entry for the System Window Import Utility. This utility is frequently used for globally importing data such as organizational information. (See Keeping Connected : Fall 2003 - "Importing the OTM Hierarchy.") OTM version 2.01 was not consistently allowing the TN to be designated as an Alternate Key as the software intended. Using the TN as an alternate key is ideal since it is a unique item that can be matched during an import.

The example below shows the format of a file for importing three Organizational levels, using the **Terminal Number Asset** as the **Alternate Key**. When the import is launched, if a TN from the import file matches a TN in the Employee Editor, the Organization information will be assigned for that record.

Figure 1

