



ISM Transfers Using the KRS Site Administration Tool Region: Americas

Frequently Asked Questions

Purpose

The objective of this document is to provide Nortel's Channel Partners with answers to frequently asked questions in order to assist in the familiarization of the ISM Transfer Program using the KRS Site Administration Tool.

Target Audience:
Nortel Channel Partners

Customer Implementation Team
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ISM Transfers Using the KRS Site Administration Tool

FAQ

Important Note: This document does not replace, nor should be used as a complete program guide to the ISM Transfer Program. The full program details and policies are contained in Product Bulletin, P-2005-0296, posted on the Partner Information Center.

General Information

What is the ISM Transfer Program?

Since April 1, 2004, ISM transfers have been accomplished via PO submission into Nortel. Beginning October 10, 2005, this process will be automated to allow partners to manage transfers via the KRS Site Administration Tool. Nortel partners will be able to manage their systems' growth by using the Site Administration Tool within KRS to perform the following:

1. Move user ISM (Incremental Software Management) parameters (Analog to Digital or vice versa) on the same PBX.
2. Move ISM parameters of the same type, from one PBX to another within the same network.

This capability only applies to systems on software CS1000 Release 3 or later (on current or sustained status). Transfers are only permissible between systems of the same release. Registration is required to use this tool; however for customers who had used the manual process of submitting PO's, registration will be automatic.

How do I participate in the ISM Transfer Program?

Be sure to read the detailed Product Bulletin, P-2005-0296, thoroughly.

Same Site Transfers requires no fees, and no Network Pool registration. Your Partnership simply has to be the Channel of Record (last software order placed onto Nortel) for the site and you must have an employee that has KRS Site Administrator privileges.

Between System transfers require that you register the group of systems in a Network Pool. To register a Network Pool, both the Channel Partner and the End User must sign and complete a Site Registration Form. Also required is the one time Network Pool set up fee. By signing the Site Registration Form, both the Channel Partner and the End Customer agree to abide by the policies and procedures of the ISM Transfer Program.

How can I access KRS as a KRS Site Administrator?

While registering a customer's Network Pool, the Channel Partner is required to provide the name(s) (up to 4 maximum) of the KRS Site Administrator(s) who will be responsible for administering and managing the ISM transfers. Nortel will set up the Network Pool and give the individual(s) special KRS Site Administrative access.

If you are not setting up any Network Pools and wish to transfer ISMs on the same system, be sure that you are the Channel of Record (last Channel to perform a Keycode order) and submit a ticket to the Nortel Support line requesting KRS Site Administrative access: 1-800-4Nortel, Option 5, 1 or send an email to ask@nortel.com. You will be asked to provide the name and phone number of your manager for approval.

Where do I go for more information on ISM Transfers?

For more information on ISM Transfers, you may download the Product Bulletin, P-2005-0296, posted on the Partner Information Center. More information can be found at www.nortel.com/krspic or you may log into KRS to view the User Guide <http://www.nortelnetworks.com/servsup/krs/> by selecting the "Documentation, Forms & User Guides" link on the left hand menu.

How do I get assistance with the KRS Site Administration tool?

If you are having any difficulties with using KRS, please submit a ticket by contacting the Nortel Support Line, [1-800-4NORTEL](tel:1-800-4NORTEL) Option 5, 1 or you may send an email to ask@nortel.com

Same Site Transfers

What is a Same Site Transfer?

A Same Site Transfer allows a KRS Site Administrator to move ISM User Licenses of one type to another on the same PBX. For example, a site which requires more Digital ISMs and has extra Analog ISMs may move Analog ISMs to Digital ISMs. Same Site Transfers being performed via the KRS Site Administration Tool can only be performed for the following ISMs: Analog to Digital, Digital to Analog

Other Same Site Transfers are available using the manual purchase order process (i.e. analog or digital users to IP or Class users). Please see Product Bulletin, P-2004-0093-Americas for details.

What are the Requirements to perform a Same Site Transfer?

For complete details, please refer to the Product Bulletin, P-2005-0296, posted on the Partner Information Center

- Systems must be running CS1000 3.0 or later
- All ISMs transferred in units of 8 (e.g. 8 Analog ISMs to 8 Digital ISMs)

- A sysload is required to activate the new keycode, since one of the ISM values have been decremented!!
- The system doesn't know which ISMs are available – un-program them prior to installing the new keycode!
 - When converting programmed ISMs that are no longer required, they must be freed up (outed/un-programmed) or the sysload with the new keycode will remove the last ones programmed.

Do I need to register the system in a Network Pool to perform a Same Site Transfer?

No. Same Site Transfers do not require the system to be included in a Network Pool. Network Pools are required for Between System Transfers only. In order to perform a Same Site Transfer, be sure you are the current Channel of Record, which means, your Channel must have performed the last keycode order for the end customer's site.

Keep in mind, if you have the site registered in your network pool, you may perform Same Site ISM transfers on the system.

Are there any costs associated with Same Site Transfers?

There are no costs associated with Same Site Transfers.

Do I need to return a Load 22 on a Same Site Transfer?

No. You will not be required to provide a Load 22 on a same site transfer. Keep in mind however, that once you create a new keycode transferring ISMs, Nortel's database become the database of record. Be sure to perform a sysload to activate the ISMs.

Between System Transfers

What is a Between System Transfer?

A Between System Transfer (or Site to Site Transfer) allows a KRS Site Administrator to move like for like ISM User Licenses from one PBX to another. It decreases ISM type(s) on one Meridian 1/CS 1000 system (donor system) and increases the same ISM type(s) by the same amount on another Meridian 1 /CS 1000 system (Target System) in the same ISM transfer network pool.

Available ISMs are as follows:

- | | | |
|------------|---|-----------|
| ▪ 8 Analog | ↔ | 8 Analog |
| ▪ 8 Analog | ↔ | 8 Digital |

▪ 8 Digital	↔	8 Digital
▪ 8 Digital	↔	8 Analog
▪ 8 Class	↔	8 Class
▪ 8 Internet (IP) users	↔	8 Internet (IP) users
▪ 8 Basic IP users	↔	8 Basic IP users *
▪ 8 Wireless (DECT)	↔	8 Wireless (DECT)
▪ 8 ITG trunks	↔	8 ITG trunks
▪ 1 ACD agents	↔	1 ACD agents
▪ 1 PCA	↔	1 PCA
▪ 1 AST	↔	1 AST
▪ 1 RAN con	↔	1 RAN con
▪ 1 MUS con	↔	1 MUS con
▪ 1 IP Peer H323	↔	1 IP Peer H323
▪ 1 SIP Access Port	↔	1 SIP Access Port *
▪ 1 Survivability	↔	1 Survivability

* Some ISMs apply to certain software releases only

What are the Requirements to Perform a Between Systems Transfer?

For complete details, please refer to the Product Bulletin, P-2005-0296, posted on the Partner Information Center.

- All systems must be registered in an ISM Transfer network pool and registration fees apply:
 - Complete the Registration (signed by both the Channel Partner and the End Customer). Registration form will require the following pertinent information:
 - List of all system to be included in the Network Pool: The Meridian 1 / CS1000 core systems must be owned by the same customer or parent company, & located in the same region (i.e. Americas).
 - List of users who will become the KRS Site Administrators and will be responsible for performing and maintaining ISM Transfers.
 - It is also recommended to create a separate a Network Pool with all sites maintaining SRS contracts (vs. sites without SRS Contracts). This will help with the ease of management for you and Nortel.
- The donor & receiver systems must be in the same ISM transfer network pool
- The target system must be at the same or lower service level than the donor system. ISM transfers to a system at a lower service level will not create a credit. It is a one way transfer.
- Both systems must be on the same software release (current or sustained release 3.0 or later) but can be on a different issue within the release (i.e. RIs 4.0 and 4.5). The release must be at current or sustained status.
- Nortel keycode database becomes the database of record
- The donor keycode requires a sysload to activate it. The receiver system will not require a sysload.
- The channel partner and customer must agree to install both keycodes within 90 days and to send a LD 22 SLT from the donor system to Nortel
- If a LD 22 is not received within 90 days then the channel partner and customer agree (will be required) to pay for the ISMs transferred to the receiver system.

- Must leave a minimum of 16 users on a system or it must be decommissioned. Refer to product bulletin P-2004-0092 Americas to decommission a system.

Are there any costs associated with Between Systems Transfers?

There **ARE** fees associated with the initial set up (registration) of the Network Pool and/or if there are any subsequent changes to be made to the Network Pool. Once the Network Pool is set up, there are no additional fees to transfer ISMs between systems. Nortel recognizes that it is entirely up to the Channel Partner on how they wish to implement this program with its end customers and has no direction or recommendation on any additional charges that may be charged from Channel to the End Customer.

For registration order codes and instructions, please refer to the Product Bulletin, P-2005-0296, posted on the Partner Information Center.

Do I need to return a Load 22 on a Between Systems Transfer?

Yes, you will be required to provide a Load 22 for the “Donor” system. This will demonstrate that the keycode decreasing the ISMs on the donor system has been implemented. LD 22 should be sent to the Nortel KRS Network Pool Administrator at oeteam@nortel.com.

General Questions

Will I be notified if I have not submitted a LD 22 for a Donor System?

Yes. The KRS Site Administrator will receive an email upon 30, 60 and 90 days of the LD 22 not being received. If the KRS Site Administrator does not provide the LD 22 within 90 days, he/she will be contacted by Nortel and will either be required to provide the LD 22 or a purchase order for the ISMs transferred to the Target System. By signing the Registration Form, the Channel Partner and End Customer agree to abide by these rules. If Nortel finds a Channel Partner unwilling to abide by the policies outlined, a program suspension may result until further resolution is made.

What if I have a system with an SRS (Software Release Subscription) Contract?

You may register systems with or without SRS in your Network Pool. Transferring ISMs between systems may be performed as required. The End Customer should notify the Channel which holds the SRS contract of the ISM transfer (if the Channel is not the same as the Channel contracted to perform ISM Transfers). When the customer desires to exercise the SRS upgrade codes, the SRS contract must be updated with the Nortel Service Contract Managers to the increased ISMs prior to being able to perform the free upgrade.

Example:

System A = 500 ISMs with SRS Contract
System B = 500 ISMs without SRS Contract

- 1.) If System A donates 250 ISMs to System B, then no update is required for the SRS Contract. No credit for the SRS contract is available.
- 2.) If System B donates 250 ISMs to System A, then the SRS contract for System A will be required to be updated at 750 ISMs before applying the SRS order codes for any upgrade.

Example 2:

System A = 500 ISMs with SRS Contract
System B = 500 ISMs with SRS Contract

- 1.) If System A donates 250 ISMs to System B, then SRS Contract for System B is required to be updated, however, no fees will be applied.
- 2.) If System B donates 250 ISMs to System A, then SRS Contract for System A is required to be updated, however, no fees will be applied.

Important Notes:

- SRS Contracts do not need to be updated in order to perform an ISM transfer. You will be required however, to update the SRS Contract when desiring to upgrade the core system software.
- It is also recommended to create a separate Network Pool with all sites maintaining SRS contracts (vs. sites without SRS Contracts). This will help with the ease of management for you and Nortel.

If you have any questions regarding your SRS Contract against your site please contact your Service Contract Management team.

May I transfer CLASS to Analog ISMs on a Same Site Transfer?

No. The CLASS to Analog ISMs Transfer is not allowed neither using the ISM Transfer Program using the KRS Site Administration Tool, nor using the purchase order method. Some transfers are available via the purchase order method and are not available on the KRS Site Administration Tool. For more details, please see Product Bulletin P-2004-0093 Americas.

What if an order is currently open for the system? Will KRS allow me to perform an ISM transfer?

Never attempt ANY form of ISM transfer (i.e. Same Site or Site to Site) **if** there is an open order against the site(s). Performing an ISM Transfer while an open order is present will result in KRS returning an error message that the transfer cannot take place. You will be unable to perform the transfer until that order has been invoiced. Please wait until the order has invoiced before attempting the ISM transfer again.

What types of systems may I perform transfers for?

This program applies to Communication Server 1000 Family of Core systems which includes the Meridian 1, CS 1000M, and CS1000E* systems. It does not include

Applications, BCM, and SRG User Licenses, MG1000T nor MG 1000B-Branch Office systems.

* There are some exceptions with CS1000E systems running Geographic Redundancy. Details are as follows:

- Any CS 1000E system (generic 3321 or 3621) in a 1+1 Geographic Redundant configuration (primary or secondary) **cannot** be in a Network pool and cannot perform ISM transfers (as donor or receiver). This can be determined in the software history an entity _type of "system_input" has a corresponding entity_name of "ordernoref" or "siteidref". If this is the case, then the system is in a 1+1 configuration and cannot be involved in ANY ISM transfers.
- CS 1000E systems (generic 3321 or 3621) in an N+1 Geographic Redundant configuration (has feature 405 turned on) **can** be included in Network Pools but have the following limitations for ISM transfers.
 - Can donate or receive any ISMs except IP users and IP Basic users as normal
 - Can receive IP users ISMs from any system type
 - Can donate IP user ISM only to receiving systems that also have feature 405

Can ISM values be lowered using the KRS Site Administration Tool?

No. ISM values cannot be lowered using the KRS Site Administration Tool. Nortel does allow Channel Partners to lower ISM values; however, procedures must be followed. See Product Bulletin P-2004-0092 Americas. Section: Reducing Capacity (Lowering ISMs).

Is H.323 to SIP Transfers allowed?

H323 to SIP transfers are NOT allowed at this time. Nortel may choose to revisit this option at next major software release.

Will COAM (Customer Owned and Maintained) be able to utilize this program?

COAMs will not be able to utilize KRS to perform ISM Transfers. COAMs may participate in the program by working with a Channel Partner. The same policies and procedures apply. The Channel Partner will need to sign the Registration Form along with the COAM. The Channel Partner will perform the ISM transfers via KRS for and behalf of the COAM.

Some end users have multiple Channel Partners due to geographical disparity. Do they need to decide / declare which

Partner will conduct the transfer, or can each Partner perform the transfer in their region on behalf of the customer?

The Customer (End User) must decide which Partner they will work with to conduct and manage their ISM transfers. A Customer may choose to contract with one Partner in one geography region to set up a Network Pool (e.g. Network Pool A) and may choose to contract with a different Partner in a different Geographic region to set up a separate Network Pool (e.g. Network Pool B). However, one Network Pool can only be managed and contracted to one Channel Partner. Transfers between Network Pools (e.g. between Network Pool A & B) are not allowed.

May I include systems in different regions in my Network Pool?

You may include in your Network Pool systems that are purchased in the Americas (CALA, US, Canada); systems not included are those purchased in EMEA and Asia Pacific.

What are the prices of the fees associated with registering a Network Pool?

Please refer to the GPPC Catalog for pricing: www.nortel.com/gppc Associated order codes are as follows:

NT8R80AE: Registration code for every 10 sites registered
NT8R80BE: 2-site Network Pool registration fee only

Note: Any changes to an existing Network Pool will require updating of the Registration form and ordering the NT8R80AE code as explained in Product Bulletin, P-2005-0296.

How do I get a copy of the Registration Form?

- KRS web site <http://www.nortel.com/servsup/krs/> and then click '[Documentation, Forms & User Guides](#)'
- Global Product and Pricing Catalogue Website – INFORMATION – Software Order Forms.

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