NORTEL

Product Bulletin

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ISM Transfers using KRS for Communication Server 1000 Systems - Release 3.0 & higher

Introduction

Nortel Networks (Nortel) is pleased to announce the Site Administration Tool for ISM transfers via the Keycode Retrieval System (KRS) The KRS website now delivers a self-service based tool for channel Partners to manage both same system and between system ISM transfers without having to place purchase orders.

This bulletin documents the registration process, policies and conditions for ISM transfers using KRS for:

1. Same System ISM Transfers: Moving PBX [1] user ISM parameters (software licenses) from one type to another (Analog to Digital; Digital to Analog) on the same CS 1000 Release 3.0 or later system.

    When upgrading one ISM type to another where there are price differences, the purchase order method must be used, please refer to product bulletin P2004-0093.

2. Between System ISM Transfers: Moving PBX [1] user ISM parameters (software licenses), of the same type; (for example Analog to Analog), from one CS 1000 Release 3.0 or later system to another Release 3.0 or later system.

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[1]   These procedures and policies do not apply to Applications, BCM, or SRG user licenses. They apply to Communication Server 1000 /Meridian 1* core system user licenses/ISMs. Transfers are not applicable to CS 1000E Geographic Redundant configured systems or MG 1000T systems; or MG 1000B -Branch Office systems). Some exception requests may apply upon Product Management approval and by using the purchase order method only. (refer to Policies for CS 1000E systems).

<u>Main Topic</u>

Since the introduction of Customer Value Software Delivery (CVSD) with Release 3.0 software, the system capacity is controlled by the software as well as the hardware configured.   With CVSD, software parameters (called ISMs for "Incremental Software Management") need to be in place on the system for the hardware to work for the user type/service type.

In today's business environment, customers may need to adjust ISM levels on a particular system or move users from one location to another. To do this, the software ISM parameters installed need to be adjusted.

Growth within customer networks can be managed several ways to keep disruptions and costs to a minimum:

1. Plan for some expansion capacity using "Wired for" on PBX's where frequent or small scale moves are expected. ("Wired for" means the software ISMs are provisioned, but the hardware is not)

2. Perform ISM transfers from one type of extension to another (example:. Analog to Digital) to increase software capacity on a PBX for a particular type of telephone.

3. Perform ISM transfers from one PBX to another to better enable larger scale moves & system consolidation or expansion. This option is recommended for larger scale moves only (i.e., a large number of users) as it requires the update and installation of 2 keycodes, one which requires a system restart (sysload) to activate due to decrementing an ISM.

How to Register for the Site Administration for your KRS account

- **Same System ISM Transfers**: Use the "Site Administration" area on KRS to request access. Channel Partners who have already registered will be automatically set up for this functionality. No Nortel Fees apply.

- **For Between System ISM Transfers:** Register customer sites in Network Pools by completing the ISM Transfer Site Administration Registration Form

  Fees: **NT8R80AE** registration fee for every 10 sites registered.
  NT8R80BE : 2-site Network Pool registration fee only.

  Form: Send completed registration form to oeteam@nortelnetworks.com or applicable regional Administrator

Your KRS permissions will be modified by the Nortel Pool Administrator (for the region) when your ISM Transfer Site Administration Registration
 Form is received and your Customers Network Pool is created.
If you desire additional individuals in your organization to have this capability you can request this by contacting your Nortel Pool Administrator or emailing a request to
sswan@nortel.com

See further details per the Registration Form

- This form (Excel spreadsheet) can be downloaded from the following web locations:
    - 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.

 Problem resolution or escalations using KRS should be directed to the Nortel KRS Level 2 Support Team via 1-800-4-Nortel – Option 5 – Option 1

KRS/ ISM Transfer User Guide

For instructions on how to use the Site Administration Tool on KRS to manage ISM transfers, please refer to the KRS User Guide located on the Keycode Retrieval System website: http://www.nortel.com/servsup/krs/

The User Guide is located under the Documentation, Forms and USER GUIDES menu, select ISM xfer User Guide from the pulldown menu (Step 1.0).

Same System ISM Transfers Using KRS

Converting users from one type to another on the same system

After upgrading to CS 1000 Release 3.0 or later, a customer may find they have too many of one type of extension and wish to convert these to another type of user. Same system ISM transfers will create a single keycode which decrements one ISM parameter and which increments another by the same amount on a single system.

Using Keycode Retrieval System (KRS):

For same system ISM transfers using the Keycode Retrieval System (KRS) website, Channel Partners can manage same system ISM transfers for analog and digital user licenses. The self-serve KRS system will be used to adjust the relative quantity of analog and digital users within a system without having to place a purchase order.

The channel partner will make the request using KRS and the system serial number. The request will be automatically validated and the resulting keycode will be available for download on KRS within minutes of the request being made.

- Same system ISM Transfers **do not** require the system to be registered to a network pool

- • Channel Partners need to be Registered for Site Administration only. There are no charges for same system ISM transfers using KRS.

Same System ISM Transfers – Terms and Conditions

- The current listed Channel of Record for a site may perform same system ISM transfers for the site using either method (using KRS or purchase order method). Any Channel Partner that has the site registered in a network pool that they manage, may also perform same system ISM transfers on the site (using KRS or purchase order method). They will become the Channel of Record for the updated keycode.

- COAMs and authorized Nortel resellers may not request same system ISM transfers. As with all other software changes they must work through an authorized Nortel Channel Partner.

- This process applies only to systems upgraded to or purchased at CS 1000 Release 3.0 or later.

- All same system ISM transfers are in units of 8. (ISM value increment)

- The updated keycode for ISM transfers initiated on KRS (when available) will only be delivered on KRS.

- ISM Transfers cannot take place if an open order exists for the site. Notification of an open order will be provided when using the KRS tool.

- A sysload is required to activate the new ISM keycode on the system since one of the ISM values will be decremented.

- It is IMPORTANT to ensure that the equivalent number of donor ISM's are available (ie un-programmed) on the system prior to installing the new keycode, i.e. if 48 analog ISMs are to be converted to digital ISMs, then there must be 48 spare analog ISM's (ie un-programmed) on the system prior to installing the new keycode. When converting previously programmed analog ISMs (that are no longer required) to digital ISMs, then the analog ISMs must have been freed up (outed/un-programmed). Failure to do so will result in the removal of last programmed ISMs during sysload.

- Procurement of all hardware (e.g. line cards, IPE modules/cabinets, power supplies etc.) required to utilize the new ISMs must be purchased as merchandise items.

- Due to the commercial impact (price differences), it will not possible to move analog or digital users to IP or Class users using KRS. The purchase order process must be used for these types of transfers. KRS will only be available to transfer analog ←→ digital for same system transfers.

  - If any of the conversion to IP codes are ordered (NTE968EA, NTE968FA, NTE968GA) on the same purchase order as a service level upgrade, then Nortel will process the service level upgrade code first and then the ISM transfer to IP upgrade code(s) second. A single keycode will be generated.

This is important, and only affects the transition codes to IP codes because a service level upgrade is dependent on 3 values independently:

> 1) number of traditional users (analog+digital+class+wireless);
>
> 2) number of ACD agents and
>
> 3) number of IP telephones on your system.

Because the number of traditional telephones and IP telephones will be changing - it must be understood which code will be processed first so that the correct number of each user type is ordered for the service level upgrade. In other words, the quantities ordered for the service level upgrade must match your ISM settings as shown in LD 22 PRIOR to the ISM adjustment of analog/digital/Class to IP.

- KRS will be the database of record for any ISM transfer activity taken place.

- Same system ISM transfers are <u>not supported on Branch Office or SRG systems</u>.

Between System ISM Transfers using KRS

Moving Users/ISM's from one system to another

A customer may need to move functionality controlled by Incremental Software Management (ISM) parameters from one system to another, or to multiple systems. This may be due to reallocation of personnel across sites which results in additions and deletions of users from site to site.

- A <u>donor system</u> is the system from which ISMs will be removed.

- A <u>target system</u> is the system where these ISMs will be added.

Between system ISM transfers <u>will create two keycodes</u>: one which decrements the ISM counter(s)on the donor system (<u>which requires a sysload to activate</u>) and a second which increments the same ISM counter(s) by the same amount, on the target system.

Before a Channel Partner can transfer ISMs between systems, they must engage their customers and obtain approval to create a network pool of systems (Site I.D.'s) which are owned or leased and exclusively used by this customer. Nortel has created the "ISM Transfer Site Administration Registration form" which must be completed and signed by both the End User and Channel Partner. There is a charge for registration and when changes are being made to ISM transfer network pools.

<u>The network pool must be Approved and set up by Nortel before any between system ISM transfers can be completed</u>.

<u>A LD 22 print-out (SLT) must be returned to Nortel within 90 days</u> of the ISM transfer showing that the downgrade keycode has been installed. (See Policies and Conditions)

Using KRS for Between System ISM Transfers:

To facilitate the movement of ISM parameters between different systems, on a "like for like" basis (ex. analog to analog), Nortel has introduced a new capability on the Keycode Retrieval System (KRS) website for Channel Partners to manage this activity.

The KRS system is used to move equivalent quantities of like-for-like ISMs from a donor system to a target system. The request will generate two keycodes - one reducing the ISM type on the donor system and the second increasing the same ISM type by the same value on the target system.

Individual ISM transfers using KRS have no charge associated with them, however the process **does** require the systems to be **registered** to a network pool. There is a charge for the initial network pool registration and when there are network pool changes required.

When using the KRS method for ISM transfers, the ISMs from a donor system can be transferred to one target system at a time only.

Decommissioning a Site

When all users on a donor system are transferred to a target system, this effectively decommissions the donor system since the donor system no longer has any right to use (RTU) software licenses. Right to use software licenses are sold on a per user basis on CS 1000 Release 3.0 and later.

When a system is decommissioned, Nortel will flag the Site I.D. and Security Devices for the donor system as decommissioned, and no subsequent transactions can be processed for the serial number. As per the Software License RTU Agreement, the Channel Partner **must** return the security devices (system dongles) and Software Media to Nortel within 60 days of the generation of the new keycode for the target system.

Note: A minimum of 16 Users (any type) must remain on a system otherwise it must be decommissioned.

Refer to product bulletin P 2004-0092 Americas to decommission a system and move the software licenses to another system.

Site Registration Process for ISM Transfers Between Systems

Before a Channel Partner can transfer ISMs between systems, they must engage their customers and obtain approval to create an ISM transfer network pool including Site I.D.'s which are owned or leased and exclusively used by the end customer.

The Site I.D.'s are the serial numbers of any system that you wish to include in your ISM transfer network pool. It is extremely important that the serial number be correct to prevent problems with the keycodes generated.

Once the Channel Partner obtains this approval, in writing & **including the authorization signature from the end customer,** they can then submit the "ISM Transfer Site Administration Registration form" to Nortel to register the Site I.D.'s against their chosen network I.D. name.

A registration fee (**NT8R80AE**) will apply to each block of 10 sites or fewer in any one network pool. There is no limit to the number of sites that can be included in a single ISM transfer network pool.

> **Site registration examples:**
> - To register a network pool of 85 sites: 9 x NT8R80AE must be ordered and the ISM transfer pool will include the serial numbers for 85 sites
> - To add, at a later date, 4 new sites to this pool: 1 x NT8R80AE must be ordered and the ISM transfer network pool will now include 89 serial numbers.
> - To register 2 ISM transfer network pools, each containing 5 individual sites: 2 x NT8R80AE must be ordered
> - The removal of 1 to 10 sites from a network pool: 1 x NT8R80AE must be ordered.
> - To move up to 5 sites from 1 network pool to another: 1 x NT8R80AE.
> - To move 6 sites from one network pool to another: 2 x NT8R80AE

A registration fee (**NT8R80BE**) will apply to smaller scale customers that wish to set up a network pool for 2 sites only and have no plans to expand their network. Any changes to increase this network pool will need to follow the instructions above.

Refer to the **Registration Form** for further details.

Policies and Conditions for Network Pool Site Registration

– The end-customer and Channel Partner complete and sign the "ISM Transfer Site Administration Registration form," and by doing so agree to abide by the procedures and rules as described in this document.

– A Channel Partner who is <u>not</u> identified as the current Channel of Record for a site will be permitted to register the site in a network pool provided they have a completed and signed "ISM Transfer Site Administration Registration form" form the end customer.   Once the Channel Partner who manages the network pool transfers any ISM(s) - they will automatically be recorded as the Channel of Record for the newly created keycodes for both systems.

– By signing the "ISM Transfer Site Administration Registration form": the end customer agrees that the KRS database will be used as the master reference source for ISM values for these systems and the end customer certifies that they own or lease and have exclusive use of the listed systems.

– Where two (2) Channel Partners are involved in the management of a customer's site, the Channel Partners and end customer must nominate one Channel Partner to prime the ISM transfers (they will become the Channel of Record for all ISM transfer keycodes).   **CAUTION:**   Identification of a

second Channel Partner to manage ISM transfer initiation and subsequent keycode installation may violate maintenance contracts with other Channel Partners. End customer and Channel Partner should proceed with extreme caution when setting up network pools.

− COAMs and authorized Nortel resellers may not register network pools. As with all other software changes they must work through an authorized Nortel Channel Partner.

− The "ISM Transfer Site Administration Registration form" includes a list of Customer Site I.D.'s, and a network pool name which will be assigned against a network pool of systems. ISM's may be transferred between systems within this pool of systems only.

− A Site I.D. can only be registered in one network pool. Multiple pools can exist for a given Customer. Transfers can only occur within a given pool.

− Any number of sites may be included in a network pool provided that they all meet all of the following criteria:

  ▪ Systems can be on any release of software. Eligibility for ISM transfers is controlled during the time of the ISM transfer request itself. In other words, PBXs on software releases lower than Release 3.0 can exist in a network pool in anticipation of upgrading, but they will not be able to donate or receive ISMs until they upgrade to Release 3.0 or later.

  ▪ IT IS RECOMMENDED TO ALSO SET UP YOUR NETWORK POOLS WITH SITES THAT MAINTAIN SRS CONTRACTS FOR EASE OF MANAGEMENT.
  ▪ All are owned or leased and exclusively used by the same customer,
  ▪ All ISM transfers for all sites in the network pool will be managed by the same channel partner
  ▪ Network Pools need to be set up per region required. Systems in an Americas network pool may be located in CALA, Canada and /or the US. In other words, user licenses can be transferred between systems located in any country in the Americas region: Canada, Cala and US., but cannot contain sites from any other region.
  ▪ Network Pools for other regions can only contain sites from the same country

− Branch office and SRG systems cannot be included in ISM Transfer network pools. A Branch Office or SRG system cannot be the donor or the target system in a between system ISM transfer.

− 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). MG 1000T systems also do not apply for ISM transfers.

  > CS 1000E systems (generic 3321 or 3621) in a 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

- Nortel will complete the administration necessary to set up the KRS database and security mechanisms to allow these systems to be available for ISM transfers by the Channel Partner (along with the registration charge as defined by the NT8R80AE/BE). A minimum of 3 days should be planned to set up a network pool.

- Any change to an ISM network pool requires submission of an updated "ISM Transfer Site Administration Registration form" documenting the change. The network pool registration charge NT8R80AE must be ordered to make changes. Each increment of the NT8R80AE allows up to 10 individual system registration changes.

  - Moving a single site from pool A to pool B would require a quantity of 1 NT8R80AE that would cover the Site I.D. removal from pool A and the Site I.D. addition to Pool B. A single NT8R80AE fee would permit the movement of up to 5 sites from one pool to another pool.

ISM Transfers Between Systems ‐ Policies and Conditions

- This process applies only to systems upgraded to or purchased at Enterprise software Release 3 or later. (CS 1000)

- Between System ISM transfers can only take place between systems registered in the same network pool. A site can only be registered in one network pool.

- Only the Channel Partner who registered the network pool can request ISM transfers between sites registered in the network pool.

- COAMs and authorized Nortel resellers may not request between system ISM transfers. As with all other software changes they must work through an authorized Nortel Channel Partner.

- Systems must be on a current or sustained release of CS 1000 Release 3.0 or later software in order to transfer ISMs between systems. Both systems participating in the ISM transfer must be on the same release of software but may be on different issues of that release (ie both on Release 4.x - one might be on 4.0 and one might be on 4.5). ISM transfers are not supported on systems running pre-Release 3.0 software.

- Between System ISM transfers are supported between Meridian 1 and/or Communication Server 1000 system types. For example, ISMs can be transferred from an Option 11C to a CS 1000M SG system.

- Branch office and SRG systems do not support ISM transfers between systems. A Branch Office or SRG system cannot be the donor or the target system in an ISM transfer. In the case of Branch systems only, exceptions may apply upon Product Management approval.

- ISM transfers are allowed from a donor system at any software service level to a target system at the same or lower service level. An ISM transfer to a system with a lower service level is a one way change - if the ISMs are required on the original system in the future then they cannot be moved back.

- ISMs can never be transferred from a system with a lower service level to a system with a higher service level.

- The Between System ISM Transfer process will generate two keycodes, one downgrading the donor system and one upgrading the target system. By utilizing this process the end customer and Channel Partner commit to installing both keycodes on the respective systems within 90 days of the generation of the ISM transfer keycodes and must send a LD 22 SLT from the downgraded system to Nortel once they have done so

- **By signing the "ISM Transfer Site Administration form", the end customer and Channel Partner agree that if they do not return a LD 22 SLT for the downgraded system within 90 days, then they will require to place a purchase order for billing purposes only to pay for the ISMs transferred to the target system.**

The keycode for the donor system will require a sysload to activate the reduced ISM value(s) on keycode. The keycode for the target system will not require a sysload to activate the incremental ISM value(s) on keycode.

- Please ensure that the equivalent number of donor ISM's are available (ie un-programmed) on the system prior to installing the new keycode, i.e. if 16 analog ISMs are to be converted to digital ISMs, then there must be 16 spare analog ISM's (ie un-programmed) on the system prior to installing the new keycode. When converting previously programmed analog ISMs (that are no longer required) to digital ISMs, then the analog ISMs must have been freed up (outed/un-programmed). Failure to do so will result in the removal of last programmed ISMs during sysload.

- Only ISM parameters of the same type can be moved from one system to another. i.e. 32 analog users reduced from a donor system will be added to a target system provided that the target system is at the same or a lower service level than the donor system.

- Between system ISM transfers can occur between the following ISM's in the increment sizes listed:

▪ 8 Analog	←→	8 Analog
▪ 8 Digital	←→	8 Analog
▪ 8 Class	←→	8 Class
▪ 8 Internet (IP) telephones	←→	8 Internet (IP) telephones
▪ 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

- Using KRS to transfer ISMs - the new keycodes will only be delivered through KRS. Using the purchase order method, the keycode will be delivered on KRS and when applicable it will also be sent to the ship to address on the purchase order as is standard for all other types of keycode orders.

- ISM Transfers cannot take place if an open order exists for the site. Notification of an open order will be provided when using the KRS tool.

- Procurement of all hardware (e.g. line cards, IPE modules/cabinets, power supplies etc.) required to utilize these ISM must be purchased as merchandise items.

- If plans change after an ISM transfer is requested and new keycodes are created, then a new ISM transfer request, including any associated charges, will be required to revert back to the original ISM settings

- A minimum of 16 ISM of any type must be left on a system, or the system must be decommissioned.

Installing the Downgrade Keycode & Notifying Nortel

- It is the responsibility of the Channel Partner who requests an ISM transfer to ensure that all keycodes are installed at the sites.   It is the responsibility of the Channel prime who approves the "ISM Transfer Site Administration Registration form."

- The Channel Partner must return a LD 22 SLT print-out to Nortel by email or fax (details below), confirming that the downgrade keycode has been installed, no later than 90 days, after receiving the downgrade keycodes.

Email address: oeteam@nortel.com

Fax Number: (954) 858 -7616

Please refer to the Registration Form for alternate email/tel number for your region.

Note: When ISMs are transferred from a site that is not in use (i.e., the system is not powered up), and the downgrade keycode cannot be installed and a LD 22 SLT obtained, the channel ISM transfer prime must alert the Nortel ISM transfer prime in writing, by e-mail or fax (to the address above) detailing the situation. In such cases - the Nortel software history databases will be used as the master reference source for ISM values for these systems for all future keycode transactions.

− After 30 days from the creation of the ISM transfer keycodes, if the LD 22 is not received, then a reminder e-mail will be sent to the Channel Partner ISM transfer prime listed on the "ISM Transfer Site Administration Registration form." After 60 days from the creation of the ISM transfer keycodes, the LD 22 is not received, then the Nortel Pool Administrator will contact the Channel Partner ISM transfer prime to discuss the situation.

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If a Channel Partner fails to return a LD 22 from the downgraded system within 90 days, then by signing the "ISM Transfer Site Administration form," the Channel Partner agrees to submit a purchase order for billing purposes only, for the value of the ISMs activated on the target system. If a Channel Partner fails to submit a purchase order when requested to do so, then the Channel Partner will be denied approval for all future ISM transfer registration requests and all existing network pools will be deactivated.

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References and Related Documents

- Product Bulletin P 2004-0093 Rev 2:   Transferring ISMs on Succession 3.0 &later using Purchase Orders

- Product Bulletin P 2004-0092 Americas: Succession 3.0 Software License and Feature Adjustments   This bulletin contains information on the policies, procedure and required form to decommission a system and move the software licenses to another system.

- KRS/ISM Transfer User Guide: Log on to KRS web site http://www.nortel.com/servsup/krs/ and then click 'Documentation, Forms & User Guides' from the left sidebar to access all documentation.

- ISM Transfer Site Administration Registration Form: This form (Excel spreadsheet) can be downloaded from the following web locations:
    o KRS web site http://www.nortel.com/servsup/krs/ and then click 'Documentation, Forms & User Guides
    o Global Product and Pricing Catalogue Website – INFORMATION – Software Order Forms.

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