

# MERLIN® Plus COMMUNICATIONS SYSTEM

System Planner



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	Date
	Name
	Address
	Phone
	DOSS Order No.
The information you supply on the enclosed form your new MERLIN Plus Communications Systee that you provide this information <i>prior to installa</i> Technician will train someone from your compa- installation.	ms will enable your AT&T Service Technician to install m so that it works exactly as you want. It is important <i>tion.</i> In addition to installing your system, the Service my to use it, so you <i>must</i> have someone present during the
What is the name and phone number of the perso	on who will be present when your system is installed?
Name	Phone
Fill out the attache Terminal Assignm	ed System Planner Configuration Form, including the Voice ent section, using the following guidelines:

DIAL SIGNALS	Under <b>Dial Signals</b> , check one of the following: • Touch-Tone —if <i>all</i> of your telephone lines are Touch-Tone lines
	$\bullet \operatorname{Rotary}$ (Pulse) —if one or more of the lines are rotary-only lines
LONG DISTANCE DIALING	Under Long Distance Dialing check one of the following:
	• Toll-Prefix —if you have to dial a 1 or 0 before the area code when making a long distance call
	$\bullet$ Area Code Only —if you don't have to dial a 1 or 0 before the area code
TRANSFER RETURN	Under Transfer Return Interval, check one of the following:
	ullet No Return —if you don't want transferred calls returned to the originator
	• Rings —if you want transferred calls to return after more or less than four rings which is the default (fill in the blank with the appropriate number —up to nine rings)
CALL REPORT	Under <b>Call Report</b> , complete the following if you have the optional data collector and printer:
	• Put a check mark in the box next to Outgoing Calls Only if you want to record only outgoing calls.
	• Put a check mark in the box next to Incoming and Outgoing Calls if you want to record both incoming and outgoing calls.

	• For either selection above, fill in the Minimum Duration of a call (0 through 9 minutes) before it is recorded. If 0 is selected, calls will be recorded after ten seconds.
MUSIC-ON-HOLD	Under <b>Music-on-Hold</b> , put a check mark next to the appropriate music volume to adjust the volume through administration, if you have an optional audio source connected to the Music-on-Hold jack.
BACKGROUND MUSIC	Under <b>Background Music</b> , put a check mark next to the appropriate music volume to adjust the volume through administiation, if you have an optional audio source and an optional loudspeaker paging system.
OUTSIDE TELEPHONE LINES	Under <b>Outside Telephone Lines</b> , enter the <i>telephone number</i> and <i>line type</i> for each of your outside lines. For example, enter "CO" (for Central Office) for regular lines, "FX" for a Foreign Exchange line, etc.
AUTOMATIC SYSTEM ACCESS	Under <b>ASA Line Assignments</b> , follow the instructions below if you are planning to use any of the ASA features—Call Forwarding Direct Extention Dialing Remote Line Access, or System Answer.
	• Enter an "I" for the line(s) in the incoming line group for each ASA feature you are using.
	• If you entered an "I" for an incoming Call Forwarding line, you must also enter an "O" for the line in the outgoing Call Forwarding line group.
	• For each ASA feature you've selected, specify the number of rings (0 through 9) you want before the call is answered by the feature. If 0 is selected, calls will be answered immediately.
VOICE TERMINAL	Under Voice Terminal Assignments:
ASSIGNMENTS	• Write in the <i>name</i> of the system attendant and the attendant's <i>location</i> next to Intercom (Icom No.) Number 10.
	• Next to the remaining intercom numbers (11-29); write in the <i>names</i> and work <i>locations</i> of the people who will have MERLIN system voice terminals. (See NOTE.) Also, indicate the <i>type</i> of voice terminal (5-, 10-, 22-, or 34-Button) each person is assigned.
	<b>NOTE:</b> If you will be using any of the Automatic System Access (ASA) features, write ASA next to Icom. No. 18. If you will be using the Busy Buster and/or the Call Report Feature, write BB/Reports next to Icom. No. 19.
	• For each <i>line</i> (A-H) associated with each intercom number, indicate whether it will be button free, that is, the incoming line will ring at the voice terminal but will not have a button associated with it. If a voice terminal will have button free line assignments, write in the abbreviation for the ringing option you want:
	R = the line will ring at that telephone $N$ = the line won't ring

	Draw a circle around the ringing option you've selected for the button free line assignments. Now for the remaining lines to be assigned to buttons on the voice terminals, use the following abbreviations for the ringing options:								
	R = the lin $N = the lin$ $D = the lin$	e rings immediately e won't ring e rings after a delay							
	Any ringing optio Free Line Operation	ns circled on the form must be administered for Button- on.							
	• For <i>Automatic Line Selection Sequence</i> , enter the line letters assigned to each telephone in the order that they will be selected by that telephone. See the example, where the President wants line C, a private line to be selected first, and also wants access to all of the other lines. The entry is C, A, B, D.								
CALL RESTRICTIONS	Under <b>Call Restrictio</b> voice terminal in the	o <b>ns</b> , indicate the type of call restriction, if any, for each system:							
	Disallowed List	Voice terminals that have a Disallowed list assigned to them cannot make specified calls. Follow the directions to complete the Disallowed List Entry Form under "Call Restrictions, Disallowed List, and Allowed List Entry Form." Then, put a check mark next to each voice terminal you're assigning the Disallowed list.							
	Unrestricted	Unrestricted voice terminals are able to make any kind of outside call. Put a check mark next to each voice terminal that is able to make unlimited outside calls.							
	Toll Restricted	Toll Restricted voice terminals are able to make local but not long distance calls. Put a check mark next to each voice terminal that can make local calls but not long distance calls.							
	Outward Restricted	An Outward Restricted voice terminal cannot make any outside calls. Put a check mark next to each voice terminal that cannot make any outside calls.							
	Allowed List	Assigning Allowed Lists to voice terminals permits them to make specified calls regardless of restrictions placed upon them. Follow the directions to complete the Allowed List Entry Form under "Call Restrictions, Disallowed List, and Allowed List Entry Form." Then, enter the allowed list number(s) for each restricted voice terminal that you want to be able to make specific calls.							

PAGING GROUPS	Under <b>Paging Groups</b> , check the appropriate column(s) to indicate which paging group (Group 1 or Group 2) each person will be assigned.
	<b>NOTE:</b> This is a MERLIN Plus system feature and does <i>not</i> require any additional equipment. Your MERLIN Plus system comes with the first ten positions (Icom Nos. 10-19) assigned to Group 1 and the second ten positions (Icom Nos. 20-29) assigned to Group 2.
VOICE TERMINAL ASSIGNMENT FORMS	There are two choices given under <b>Voice Terminal Assignment Forms</b> . Put a check mark in the <i>Templates Form</i> column if you're assigning one of the four preprogrammed templates (see page 9 and 10) to the voice terminal. Place a check mark in the <i>Custom Form</i> column if you are custom-designing a template for the voice terminal.
	• Voice Terminal Template Assignment Form: In the space provided next to the appropriate preprogrammed voice terminal template on page 9 or 10, write the intercom number of each voice terminal to which that template applies.
	• Voice Terminal Custom Assignment Form: Be sure you have enough copies of the different sizes of voice terminal forms. Make as many photocopies of page 11 as necessary. For each voice terminal that is to have customized assignments, choose the form showing a matching number of buttons (5, 10, 22, or 34). Write the intercom number in the space provided on the form; then write on the button illustrations the names of the features you want to assign to the feature buttons on each of these voice terminals.
PROGRAM MODE LOCK	Under <b>Program Mode Lock</b> , put a check mark next to any voice terminal that you want to prevent individuals from reprogramming.
PARTIAL SYSTEM SPEED	On the Partial System Speed Dial Form, write in the appropriate information:
DIAL FORM	• Enter the <i>numbers</i> (telephone or account) and the <i>names</i> for the numbers that you will want the people in your system to be able to dial using an abbreviated code. Put a check mark in either the <i>telephone</i> or <i>account</i> number column to indicate whether the number you've listed is a telephone number or an account number.
	<b>NOTE:</b> It may be useful to assign telephone numbers to the two-digit codes (60 through 89) and account numbers to the three-digit codes (900 through 999) or vice versa.
	<ul> <li>Check the Private box if you do <i>not</i> want the number to appear on Call Reports and on voice terminal displays. Private numbers, however, do appear on System Feature Reports.</li> </ul>
	• Check the Restriction override box if people who are normally restricted from making outside calls should be able to dial these numbers.
CALL RESTRICTIONS, DISALLOWED LIST, AND ALLOWED LIST ENTRY FORM	You can use Call Restrictions to prevent outside calls (both local and long distance) from being made from some or all voice terminals. You can use the Disallowed List to prevent billable calls being made from some or all of the voice terminals in the system to numbers with the 900 area code, the 976 exchange, or other numbers as desired.

Using Allowed Lists and System Speed Dial codes you can permit calls from call restricted voice terminals to specific telephone numbers, local exchanges, or area codes. By combining Call Restrictions with selected exceptions, you can control outgoing call traffic and associated costs wihout placing unreasonable restraints on the people in the business.

Under "Number" on the **Disallowed List Entry Form** enter billable numbers, area codes, etc., that you want to disallow.

**NOTE:** For example, to disallow calls to the 900 area code, enter the following on the list:

1900

In the space provided next to "List 01" on the **Allowed List Entry Form**, write in the name, if any, that you want to use to identify the list, such as "Emergency Numbers" or "California Suppliers." Then, under "Number," write the area codes, local exchanges, emergency numbers or other telephone numbers that are appropriate for that list. According to the needs of the business, name and add numbers to other allowed lists in a similar fashion.

### KEY TO FEATURE ABBREVIATIONS

The following table identifies the abbreviations used for the voice terminal template labels and forms. For more information about each of these features, refer to Section 5, "Reference," in the *MERLIN Plus System Manual*.

Abbreviation	Feature
Al BB CF CPI0 DXD DND Exc Hold LND ROVRD SND	Auto Intercom Busy Buster Call Forwarding Call Pickup Intercom 10 Direct Extension Dialing Do Not Disturb Exclusive Hold Last Number Dial Ring Override Saved Number Dial
SND	Saved Number Dial

#### System Planner Configuration Form CUSTOMER: TYPICAL" **Dial Signals** Long Distance Dialing **Transfer Return Interval** Toll Prefix Touch-Tone No Return Rings REP: \_\_\_\_\_ Rotary (Pulse) Area Code Only ORD NO:\_\_\_\_\_ Call Report Music-On-Hold **Background Music** Outgoing Calls Only Low Volume Low Volume Incoming/Outgoing Calls Medium Volume Medium Volume Minimum Duration \_ MIN. High Volume High Volume **Outside Telephone Lines ASA Line Assignments** Lines **Telephone Number** Line Type Lines 555-1000 No. of Α 555 - 1001 555 - 1002 D Feature С EFGH Α B Rings B C 1 **Call Forwarding** 0 2 655-1003 D Direct Ext. Dial I 1 555-1004 Е **Remote Line Access** F G ුර System Answer 1 1 Ħ I = Incoming Line O = Outgoing Line Group 198 Voice Terminal Assignments Paging Volce Terminal Call Line Assignments Group **Assignment Forms** S. (Check One) Unrestricted Toll Restricted Outward Restricted Template Form Jutol ht. Disallow List Allowed List 2 -Custom Form Selection Program Group Group Mode Name/ VT Icom Line Line Line Line Line Line Line EFG Sequence Lock Location Туре No. Α В С D **.** H 1 RP DOLE, FRONT DESK R R 348 10 D A-E 1 JOE, ROOM 100 11 10 B R N ABP ~ 1 $\checkmark$ JANE, ROOM IOI 108 12 R R N ABD **V** ~ 7 ~ 1 505, ROOM 102 10B 13 R Ŕ N V フ 7 / ABD V SUL, ROOM 103 N V 10 B 14 R R ABD V 1,2 マ CA BD PAT, PALSIDENT 10 B N 7 15 R N R ~ CAROL , PARTS 10 E 16 N 7 ~ N R V JOHN, SERVICE N マ ЮВ 17 N R ABD 7 7 18 19 20 21 22 23 24 25 26 27 28 29 R=Ring N=No Ring **D**=Delayed Ring

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### System Planner Configuration Form

CUSTOMER:	
REP:	
ORD NO:	

### **Outside Telephone Lines**

Lines	Telephone Number	Line Type
Α		
8		
С		
D		
E		
F		
G		
Н		

Dial Signals Touch Tone Rotary (Pulse) Call Report

- Outgoing Calls Only
- Incoming/Outgoing Calls

Minimum Duration

Long	Distance	Dia
	Toll Prefix	
	Area Code	Only
Musi	c-On-Hold	l
	Low Volume	

Medium Volume

Dialing

Background Music

No Return

Medium Volume

Transfer Return Interval

🔲 High Volume

#### **ASA Line Assignments**

		No. of							
Feature	Α	B	C	D	E	F	G	H	Rings
Call Forwarding									
Direct Ext. Dial									
Remote Line Access									
System Answer									

I = Incoming Line Group O = Outgoing Line Group

### Voice Terminal Assignments

Line Assignments							Call	Restric	tions		Pag Gro	ling pup	Voice Assignme	ferminal Int Forms							
Name/ Location	VТ Туре	lcom No.	Line A	Line B	Line C	Line D	Line E	Line F	Line G	Line H	Automatic Line Selection Sequence	Disallowed List	Unrestricted	Toll Restricted	Outward Restricted	Allowed List	Group 1	Group 2	Template Form -	Custom Form	Program Mode Lock
·		10																		,	
	ļ	11					<b> </b>	<b> </b>										ļ			
		12					<del> </del>	<b> </b>				<b> </b>		<b> </b>							
		14							<b> </b>			<b></b>	<b> </b>		<b> </b>						
		15	t		<u> </u>			<u> </u>													· · · · · · · · · · · · · · · · · · ·
·	1	16	[				†							<u> </u>							
	1	17		· · · ·			1	<u> </u>													
		18																			
		19																			
		20	I																		
		21																			
		22																			
	ļ	23	ļ					<b></b>										<u> </u>			
· · · · · · · · · · · · · · · · · · ·	ļ	24	[																		
		25											<b> </b>	<b></b>							
		- 20						{													
	<b> </b>	20	<b> </b>	I			<b> </b>						}		}						
		29					<b> </b>					ł	<u> </u>								
R=Ring	N=No	Ring		D=De	layed	Ring												L			

# Partial System Speed Dial Form

Dial			(Chec	k one)		Restriction
Code	Private	Number	Telephone	Account	Name	Override
# 60		555-1000	~		ABC PARTS	✓
#61		555-3783	~		OFFICE SUPPLIES	
# 62	~	555-2397	V		PRESIDENT'S HOME	
# 63						
#64						
# 65						
# 66						
# 67						
# 68						
# 69						
#70						
#71					- 5	
#72						
#73				E		
#74						
#75			÷			
#76						
#77		<u></u>		6		
#78			A A	·		
#79		The state				
# 80						
#81						
# 82					· ·	
#83						
#84						· ·
#85						<u> </u>
#86						
#87						
#88						
#89						
<b>#90</b> 0		73622		~	ABC PARTS	<ul> <li>✓</li> </ul>
#901		32951		$\checkmark$	ELS INC.	<ul> <li>✓</li> </ul>
#902						
#903						
#904						
#905						
#906						<u>,</u>
#907						
#908	_					
<i>#</i> 909						

Dial			(Check one)			Restriction
Code	Private	Number	Telephone	Account	Name	Override
# 60					1	1
#61						
# 62						
# 63						
# 64						
# 65						
# 66						
# 67						
# 68						
# 69						
# 70						
#71						
#72						
#73						
# <b>74</b>						
# 75						
#76						
# 77						
#78						
#79						
# 80						
# 81						
# 82						
# 83						
# 84	_					
# 85						
# 86						
# 87						
# 88					•	
# 89						
# 900						
# 901						
#902						
<b># 903</b>						
# 904						
<b># 90</b> 5						
#906						
# 907						
# 908						
# 909						

# Partial System Speed Dial Form

List 09							
Item	Number						
01	1900						
02	1213976						
03							
04							
05							
06							
07							
08							
09							
10							
11							
12							
13	~						
14							
15							
16							
17							
18 ·							
19							
20							

### **Disallowed List Entry Form**

### Allowed Lists Entry Form

List 01 <u>Emerzency</u>			t 02 <u>Celifornia</u> Suppliers
Item	Number	Item	Number
01	911	01	12135552394
02	411	02	14155557632
03		03	12135554103
04		04	
05		05	
06		. 06	
07		07	
08		08	
09		09	
10		10	

List 09						
Item	Number					
01						
02						
03						
04						
05						
06	· · · · ·					
07						
08						
09						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

### **Disallowed List Enty Form**

### Allowed Lists Entry Form

List 01		List 02	
Item	Number	Item	Number
01		01	
02		02	
03		03	
04		04	
05		05	
06		06	
07		07	
08		08	
09		09	
10		10	

# Disallowed List and Allowed List Entry Form (continued)

List 03		List 04	
Item	Number	Item	Number
01		01	
02		02	
03		03	
04		04	
05		05	
06		06	
07		07	
08		08	
09		09	
10		10	

List	05	List 06	List 06		
Item	Number	Item	Number		
01		01			
02		02			
03		03			
04		04			
05		05			
06		06			
07		07			
08		08			
09		09			
10		10			

List	07	List 08	
Item	Number	Item	Number
01		01	
02		02	
03		03	
04		04	
05		05	
06		06	
07		07	
08		08	
09		09	
10		10	

-

#### **Clear Template**

34-1	Button		
22-Button			
			Assign to Intercom Number(s):
		8 0	
Conterence 🔲 Transfer 📋			
	SND		
(See Note)			

#### **Dialer Template**

34-						
22-Button		]				
10-Button			Accients Intercom Number(s)			
			Assign to intercom Humber(s).			
Conference 🗌 Transfer 🗍	8 0					
Drop Hold						
	A110	80				
	- SND					
(See Note)						

NOTE: If there are fewer than eight outside lines on a voice terminal, then those buttons will be blank on the template and on the target voice terminal. For example, if your system has four outside lines (lines A through D), then the template will have four blank buttons in the second column above the dial pad (lines E through H).

### **Voice Terminal Template Assignment Forms**

#### **Feature Template**

[		34	Button	, ———			
[	- 22-Butt	on —				,	
10-Button	n ———						
	Line H		00	DND	00		Assign to intercom Number(s):
	Line G	٥		Privacy	00		
	Line F		00			D	
	Line E						
	88					0	
Conference 🔲 T	ranster	٥	0 0				
		_					
	noia	ប		Page 1			
				age All			
			0 0	A110			
			00	SND1	00	SND2	
(See Note)			0	LND		CF/DXD	

#### Receptionist/Secretary Template

34-Button									
22-Button-		ר ' <sup>'</sup>							
10-Button		<b>A</b>							
	A119								
Line C	□ A118 □	A128							
	□ A117 □	A127							
	□ AI16 □	A126							
	□ A115 □	A125							
Conterence 🗌 Transfer 🔲	□ AI14 □	A124							
	□ A113 □	A123							
	□ AI12 □	A122							
	□ A111 □								
	AI10	A120							
	SND	CP10							
(See Note)		Page All							

NOTE: if there are fewer than eight outside lines on a voice terminal, then those buttons will be blank on the template and on the target voice terminal. For example, if your system has four outside lines (lines A through D), then the template will have four blank buttons in the second column above the dial pad (lines E through H).

### **Custom Voice Terminal Assignment Forms**





999-501-141