AVAYA
communication

PARTNER®
Advanced Communications System
System Planner

General Information

The purpose of these planning forms is to facilitate the installation of your system. The authorized installer will use these forms to configure your new PARTNER® system to your specifications. By filling in the appropriate information and selecting the preferred options and features in advance, you will help to quickly get your system up and running. As you become more familiar with your PARTNER system you may change or enhance the system to get the most out of the system's many features and capabilities.

The Table of Contents on the following page provides an overview of the forms included in this planner. All new customers are required to complete Forms A, B, and C. However, the remaining forms can be used to plan additional features that are optional in your PARTNER system. As you complete these forms, please refer to the instructions for each form for additional guidance.

NOTE: Several forms in this Planner require a printer setting of 1200 dots per inch (dpi). Lower dpi settings will cause the image resolution on some of the forms to be unclear.

Table of Contents

Form A—Customer Information

CUSTOMER BILLING NAME:	**BILLING PHONE NUMBER**
CUSTOMER CONTACT:	**CONTACT PHONE NUMBER**
PERSON TO BE TRAINED:	**TRAINEE PHONE NUMBER**
SALES PERSON/ACCT EXEC:	**SALES/AE PHONE NUMBER**
GENERAL CONTRACTOR:	**CONTRACTOR PHONE NUMBER**
(only required if new construction)	
INSTALLATION ADDRESS:	
INSTALLATION DUE DATE:	
NOTES TO INSTALLER:	
FEATURES OF INTEREST	
(list in order of priority)	

SERVICE VERIFICATION:	*Provide the name of the telephone service representative who verifed your service and the date the service was verified.* **This is not required for all installations. See next page for details.**
VERIFIER NAME	**DATE VERIFIED**

INSTALLER NAME	**DATE OF INSTALLATION**

Form A: Instructions

Service Verification

In almost all cases, the default telephone service provided by your local Phone Company will be appropriate for the PARTNER system. However, if you are switching telephone systems from a competitor's system to a PARTNER system, or if this is the first time telephone service is being established at this site, you will need to verify that your local phone company is providing you with default telephone service (Loop Start) or the installation of your PARTNER system may not be completed on the expected due date. Please provide the person's name and the date they verified default phone service in the space provided on the previous page.

Form B—System Configuration: Lines

Who is the customer contact responsible for the layout of the system?   **Name:** _____   **Telephone:** _____

If the line is a personal or dedicated line fill in the following

LINE NO.	DESIRED TELEPHONE NUMBERS	ANSWERING OPTION[1]	CALLER ID SERVICE	OTHER SUBSCRIPTION SERVICES	NAME OF LINE OWNER	OR	EQUIPMENT	CALL COVERAGE	EXTENSION NUMBER
01									
02									
03									
04									
05									
06									
07									
08									
08									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									

1. AA, DXD, ASA Hunt, VMS-AA, VMS-MAIL, LIVE, AUX. *See back for details.*

Form B: Instructions

COLUMN 2: TELEPHONE NUMBER:

Write in the telephone numbers assigned to each line. Please list the lines that will be used by multiple extensions first, then list dedicated and/or personal lines.

COLUMN 3: ANSWERING OPTION

In this space, write in the abbreviation from the list below that indicates how incoming calls to each line will be answered. In most cases, some form of automated answering option will be selected. ***NOTE: To avoid confusing caller, it is recommended that only one type of automated answer option be used to handle incoming calls throughout the system.***

Automated Answer Options:

AA	Automated Attendant	Automated system answers and routes calls. Must be purchased separately.
DXD	Direct Extension Dialing	Allows caller to dial extensions without waiting for the receptionist. *Available with ACS R2.0 or later.*
ASA	Automatic System Answer	Plays a recorded message then either places the call on hold, disconnects the call or continues to ring available extensions. *Available with ACS R2.0 or later.*
HUNT	Hunt Group	Sends calls simultaneously to a group of extensions. Up to 4 calling groups can be programmed in the system.
VMS-AA	Automated Attendant Service of PARTNER MAIL or PARTNER MAIL VS	This is system-wide voicemail service. If the receptionist does not answer an incoming call, VMS-AA lets the caller select an extension or route.
VMS-MAIL	Voicemail on a personal line	The PARTNER MAIL, PARTNER MAIL VS or PARTNER Voice Messaging PC Card must be purchased separately.

Other Options:

LIVE	Human Operator	If all calls to a specific line will always be answered by a human operator, write in LIVE.
AUX	Auxiliary Equipment	If all calls will always be answered by a piece of auxiliary equipment, such as a fax machine, write in AUX.

COLUMN 4 & 5: CALLER ID AND OTHER SUBSCRIPTION SERVICES

Check the box if Caller ID Service is activated on this Line. In the next column, write in any other telephone subscription services (ordered from your local telephone company) that are active on this line (i.e., repeat call service).

Form B: Instructions

COLUMN 6:

Write in the Owner (or assigned auxiliary equipment) for the personal or dedicated line.

COLUMN 7:

Check the box if you wish the owner of the personal or individual line to have the ability to activate Call Coverage for that line.

COLUMN 8:

Write in the extension number of the owner of the personal or individual line.

Form C—Extension Settings

EXT	OWNER	EXT. DISPLAY *up to 20*	PHONE SET TYPE	LINES ASSIGNED *with Ringing Options*			RESTRICTIONS/PERMISSIONS					CHANGE DEFAULT SETTINGS							BUTTON FEATURES
				Intermed.	Delayed	No Ring	Outgoing Only	Incoming Only	No Access	Allowed List	Disallowed List	Lang	Distinctive Ring	Abbrev. Ringing	Privacy	Forced Acct Code	Call Coverage Rings	Voice Interrupt on Busy	
10																			
11																			
12																			
13																			
14																			
15																			
16																			
17																			
18																			
19																			
20																			
21																			
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48																			
49																			

Form C—Extension Settings

Form C: Instructions

LINES ASSIGNED WITH RINGING OPTIONS

List the lines (or pool code for a pool of lines, if appropriate) that you would like assigned to each extension. For each line you enter, you have the option of listing it as an immediate ringing line, a delayed ringing line, or a no ring line. The default option for lines is immediate ringing. (For pools, the default option is no ringing).

NOTE: Any line not listed will be removed from that extension and will not be accessible from that extension.

RESTRICTIONS/PERMISSION

By default, access to all lines and pools is set to No Restriction. Access can be specifically for each line assigned to each extension. If you wish all assigned lines/pools to follow the same restrictions simply check the appropriate box. Otherwise, write in the specific line numbers to be set.

Outgoing only – User can place outside calls and receive only transferred calls on specified line or pool. If you wish the outgoing calls to be further restricted to Intercom Only calls, write in IN after the line number. If you wish the caller to be limited to only intercom (i.e., extension-to-extension) calls and local outside calls, write LOC after the line number.

Incoming only – User cannot place outside calls but can receive calls on specified line or pool.

No Access – User cannot place or receive outside calls on specified line or pool (but can receive transferred calls, pick up calls on hold, or join calls).

Any available outside lines can still be used to dial numbers on an Allowed Phone Number List assigned to the extension, numbers on the Emergency Phone Number List, or Marked System Speed Dial numbers.

Allowed/Disallowed Lists – Write in the list number corresponding to the previously established lists. PARTNER customers can establish up to 4 different lists. See Forms F2a and F2b.

DEFAULT SETTINGS

Language: Default = English. If you wish to display messages in a different language, write in the language. This is relevant only for extensions with display phones.

Abbreviated Ringing: Default = 1 ring. When a phone is in use, a new call will ring once. The line button light will continue to flash until the call is answered.

Distinctive Ring: Default = Active. By default outside, intercom, and transferred calls each have their own ringing pattern. To change the default so that all calls ring the same, write "NA" (Not Active) in this column.

Automatic Extension Privacy: Default = Not Activated. By default, any user sharing a line can join calls at another extension (Privacy is Not Assigned). If all calls are to be private, write "A" (Assigned) in this column. Always use this feature for Fax and modem extensions.

Forced Acct Code: Default = Not Activated. If a user should be required to enter an account code before placing an outside call, write A for Activated in this column.

Voice Interrupt on Busy: Default = Not Activated. To identify an extension as being eligible for Voice Interrupt on Busy calls, write A for Activated in this column

Coverage Rings: *For calls going to a covering extension the* Default = 2 rings. *For calls going to a voicemail box the* Default = 3 rings. You can choose between 1 to 9 rings. Enter the number of rings desired before a call is sent to the covering extension/or voicemail box. Can be set per extension for ACS 3.0 or later. Can only be set system wide for earlier releases.

BUTTON FEATURES

In the space provided for each extension, list the features (by the feature numbers indicated) that should be pre-programmed onto the buttons on the telephone set. The number of available buttons vary from set type to set type. A complete description of the available button features is included on the following page.

Form C: Instructions

Form C—Extension Settings: Feature Descriptions

Feature Descriptions

#	Feature	Description	Ext. 10 Only	Button Light Required	Button Light Recommended
1	Automatic System Answer	(ACS R2.0 or later only) Turns Automatic System Answer on and off. When the feature is on, a call that is not answered by the receptionist is answered by the system; the system plays a brief message, then places the call on hold, continues to ring all extensions that have the line, or disconnects the call. To use Automatic System Answer, extension 10 must be programmed with an ASA button.	●	●	
2	Direct Extension Dial	(ACS R2.0 or later only) Turns Direct Extension Dial on and off. When the feature is on, a call that is not answered by the receptionist is answered by the system; the system plays a brief message, then lets the caller dial an extension number or wait for the receptionist. To use Direct Extension Dialing, extension 10 must be programmed with a DXD button.	●	●	
3	Night Service	Turns Night Service on and off. Phones in the Night Service Group ring immediately when the feature is active, regardless of normal ringing. To use Night Service, extension 10 must be programmed with a Night Service button. Night Service Group extensions should be identified on Form F5.	●	●	
4	Outgoing Call Restriction	Allows the user at extension 10 to change the outgoing call restriction for a particular extension. An Auto Dial button with lights must be programmed for each extension to be changed.	●	●	
5	Wake Up Service	Allows the user at extension 10 to schedule an intercom call to a target extension at a designated time. If Music-On-Hold {#602} is active, music is played when the phone is answered; otherwise, nothing is heard.	●	●	
6	Fax Management	Transfers calls to the fax machine at the designated extension with one touch. The lights show when the fax is busy or when it is having trouble and not answering-for example, when it is out of paper.		●	
7	Call Screening	(Release 3.0 or later only and you must have a voice messaging system and an MLS or PARTNER system phone) Allows the user to listen to a caller leaving a message in the user's mailbox. Once the voice mail system has answered the call, the call screening begins. While the call is being screened, the user is connected to the call in a listen only mode on the speakerphone. This feature can be programmed for any extension. This feature must be assigned by Centralized Programming from either Extension 10 or Extension 11.		●	

Feature Descriptions—*(Continued)*

#	FEATURE	DESCRIPTION	Ext. 10 Only	Button Light Required	Button Light Recommended
8	Caller ID Inspect	When a user at a display phone is already on a call, this feature shows Caller ID information for another line (if Caller ID information is available on that line), without disconnecting the current call or putting it on hold. When the feature is active, the button light is on.		●	
9	Caller ID Logging	(ACS R2.0 or later only) Users at a display phone, can access a Caller ID log to ascertain caller's phone numbers automatically. When a user has logged calls, the word CALLS displays.		●	
10	Caller ID Name Display	When a user at a display phone is on a call on a line that has Caller ID information available, this feature lets the user switch between the caller's phone number (the default display) and the caller's name (if available). When the feature is active- indicating that the caller's name should be displayed-the button light is on.		●	
11	Do Not Disturb	Prevents calls from ringing at the extension. When the feature is active, the button light is on. Intercom calls get a busy signal, and outside callers hear ringing. Use only if someone else answers the extension's outside calls. If VMS Cover and Do Not Disturb are both active, intercom, transferred, and outside calls on owned lines go directly to the extension's voice mailbox. If Call Coverage and Do Not Disturb are both active, intercom, transferred, and outside calls on lines assigned ownership go directly to the covering extension. Transfer Return type calls will ring a phone with Do Not Disturb active.		●	
12	Privacy	Lets system phone users press a programmed button to turn Privacy on and off, preventing or allowing users to join calls at the user's extension as needed.		●	
13	Record-A-Call	This feature applies only to systems that have PMVS (Release 5.0 or later) equipped with four ports, and an MLS or PARTNER system phone. This feature is not available on Tip/Ring phones.		●	
14	VMS Cover	This feature only applies if you have a voice messaging system. It defines the number of times a call rings before it is sent to a user's voice mailbox.		●	
15	Voice Interrupt on Busy Talk Back	This feature is available only on system phones. This feature lets you program a button that is used to respond to a voice interrupt on busy call while the user is active on another call.		●	
16	Intercom Auto Dialing-Ring	Places a ringing intercom call to an extension, or transfers a call. If on a button with lights, the lights show calling activity at the destination extension.			●
17	Intercom Auto Dialing-Voice Signal	Places a voice-signaled intercom call to the extension's phone speaker, or transfers a call with a voice-signaled announcement. If on a button with lights, the lights show calling activity at the destination extension.			●
18	Manual Signaling - Ring	Beeps the designated extension. If the user presses i first, pressing the button places a ringing intercom call to the extension, or transfers a call. If on a button with lights, the lights show calling activity at the destination extension.			●

Form C—Extension Settings: Feature Descriptions

Feature Descriptions—*(Continued)*

#	FEATURE	DESCRIPTION	Ext. 10 Only	Button Light Required	Button Light Recommended
19	Manual Signaling - Voice	Beeps the designated extension. If the user presses i first, pressing the button places a voice-signaled intercom call to the extension, or transfers a call with a voice-signaled announcement. If on a button with lights, the lights show calling activity at the destination extension.			●
20	Account Code Entry	Allows the user to enter an account code for a call by pressing the button, entering up to 16 digits for the account code, then pressing the button again. If on a button with lights, the lights show when the feature is in use.			●
21	Background Music	Turns background music on and off at the speaker of an idle system phone. If on a button with lights, the lights show when the feature is in use.			●
22	Call Coverage	(ACS R2.0 or later only) Directs all intercom, transferred, and outside calls on lines assigned ownership to the designated extension. You may program originating and covering extension numbers on the button. If on a button with lights, the lights show when the feature is in use.			●
23	Call Forwarding	Forwards all calls to the designated extension. Unless Do Not Disturb is on, phone beeps once each time a call is forwarded. You may program originating and destination extension numbers on the button. If on a button with lights, the lights show when the feature is in use.			●
24	Contact Closure 1	Allows user to activate Contact Closure 1. User must belong to Contact Closure Group. See Form D.			●
25	Contact Closure 2	Allows user to activate Contact Closure 2. User must belong to Contact Closure Group. See Form D.			●
26	Call Park	Parks a call at a specific extension so it can be picked up from any other extension.			
27	Call Pickup	Picks up a ringing, held, or parked call at the designated extension.			
28	Conference Drop	Drops the last outside party added to a conference call.			
29	Direct Line Pickup	Allows the user to access a ringing, active or held call on a line that is not assigned to the extension. Direct Line Pickup is subject to Line Access Restrictions.			
31	Exclusive Hold	This feature is available only on system phones. This feature prevents other extensions from picking up outside calls placed on hold at a specific extension with a system phone.			
32	Group Calling - Ring/Page	Allows users to ring, page, or transfer calls simultaneously to all of the extensions in any one of four Calling Groups.			
33	Group Hunt Ring/ Signal	Lets you distribute call volume among extensions in a group, to off-load call activity from a single user.			
34	Group Pickup	Allows user at any extension in the system to answer any outside, intercom, or transferred call ringing at an extension in a Pickup Group (where G is a Pickup Group number from 1 – 4).			
35	Intercom Autodial	Lets telephone system place intercom calls with a single touch, by pressing a programmed button.			

Form C—Extension Settings: Feature Descriptions

Feature Descriptions—*(Continued)*

#	FEATURE	DESCRIPTION	Ext. 10 Only	Button Light Required	Button Light Recommended
36	Last Number Redial	Redials the last outside number dialed (maximum 28 digits). This feature is useful for immediately redialing a busy number.			
37	Manual Signaling	This feature applies only to PARTNER and MLS-model phones. This feature lets you program a button on your PARTNER or MLS-model phone that you can use to signal a predetermined co-worker's extension.			
38	Message Light On	Turns on the message light at a specified extension (where XX is a system extension number).			
39	Message Light Off	Turns off the message light at a specified extension (where XX is a system extension number).			
40	Recall	Causes the system to send a timed switchhook flash over the telephone line to recall a new dial tone or to access a PBX, central office, or Centrex feature, such as Call Waiting.			
41	Save Number Redial	This feature is available only on system phones. This feature saves into temporary memory the last outside number (up to 28 digits) dialed from an extension with a system phone.			
42	Simultaneous Paging	Accesses the loudspeaker paging system, if you have one connected to the system through the PAGE jack on the primary processor module, and all of the idle system phones with speakers assigned to Calling Group 1.			
43	Station Lock	This feature is available only on system and standard touch-tone phones. This feature lets users enter a four-digit code on their telephone dialpad to lock their extension.			●
44	Touch-tone Enable	This feature is available only on system phones. This feature lets a system phone user send touch-tone signals on an outside call over a rotary line.			
45	Voice Mail Message	This feature is available only if you have a voice messaging system. It is available only on system phones. Lets callers leave voice mail messages to called extension.		●	
46	Voice Mail Box Transfer	This feature is available only if you have a voice messaging system. It is available only on system phones. This feature lets a system phone user transfer a caller directly to a specific extension's voice mailbox, in order for a caller to leave a message without first ringing the extension.			
47	AutoDial Buttons	Places a call to an outside telephone number. Outside telephone numbers can be up to 28 digits. If a dial-out code is required to dial outside numbers (for example, on PBX or Centrex lines), include it in the stored number followed by pauses, if necessary. Write in Numbers here:			

Form C—Extension Settings: Feature Descriptions

Form D—Auxiliary Equipment

Please check the box next to any auxiliary equipment you have attached to your phone or phone system.

System vs. Line/Extension based Auxiliary Equipment

System	❏	Battery Backup	❏	Uninterruptible Power Supply	❏	Fax Machine
	❏	Music on Hold	❏	ASA/DXD Card		
Extension	❏	Call Waiting	❏	Hotline	❏	External Hotline
	❏	Extra Alert	❏	Electrical surge protector (IROB)	❏	Answering Maching
	❏	Modem	❏	Credit Card Scanner	❏	Passageway Software
	❏	Specialty Handset	❏	Headset		

❏	Contact Closure 1 (i.e., a door lock)	*Specify operation type*	1 second on _____ 3 seconds on *(default)* _____ 5 seconds on _____ Toggle
❏	Contact Closure 2	*Specify operation type*	1 second on _____ 3 seconds on *(default)* _____ 5 seconds on _____ Toggle
❏	Call Reporting (SMDR)	*Specify operation type*	Report type: Report all calls or outgoing calls only? Output format: How many digits should appear (up to 24)? Talk time: Should the duration of each call appear?
❏	Loudspeaker paging		Number of zones:

Specify the Line or Extension that the equipment is connected to:

AUXILIARY EQUIPMENT	LINE #	DEDICATED YES/NO	EXTENSION #	HUNT GROUP	PRIVACY ON/OFF

Form D: Instructions

NOTE: The following settings may be useful for auxiliary equipment: For a dedicated line (such as a Fax line, see Form B), assign the line to the equipment extension and remove it from other extensions. To prevent other extensions from interrupting calls, write "A" (Assigned) in the Automatic Extension Privacy {#304} column. In general, do not assign auxiliary equipment extensions to a Pickup Group, Calling Group, Hunt Group, or Night Service Group.

If DXD is checked, specify the following: Direct Extension Dial Delay {#112}-By default, a call rings 2 times before it is answered by the system. Write number (0-9) if different from default _____. Direct Extension Dial Record/Playback {I 892}-message of up to 48 seconds that caller hears when call is answered with the Direct Extension Dial feature. Write message below and record from extension 10 or 11: **DXD**: (PARTNER ACS Release 2.0 or later only)

If ASA is checked, specify the following: Automatic System Answer Delay {#110}-By default, a call rings 2 times before it is answered by the system. Write number (0-9) if different from default _____. Automatic System Answer Mode {#121}-By default, ASA calls are put on hold after the greeting plays. Check if calls should continue to ring or be disconnected: Ring Disconnect ASA Record/Playback {I 891}-message of up to 65 seconds that caller hears when the call is answered by the Automatic System Answer feature. Write message below and record from extension 10 or 11:

Description of each equipment with default settings and recommended program options.

Battery Backup: This is required in some countries because power can be lost several times a day. It is not typically used in the United States.

UPS: Un-interruptible Power Supply. Used as protection in the event of occasional power losses.

Form E—System Configuration: Default Settings

For many features, your PARTNER system is pre-programmed with a default setting. In the table below, either confirm the default setting (see backside of page for details on these) or write in the preferred setting.

1.	How many lines are assigned to each extension?	Lines:
2.	If you wish to use a password for Night Service and dialing restrictions, write the 4-digit password.	
3.	While a call is being transferred which of the following would you like the caller to hear? Circle one.	Ringing Silence Music
4.	How many times should a transferred call ring before it is sent to the transfer return extension?	Transfer Return Rings: _____
5.	Would you prefer that the music-on-hold jack be activated or de-activated?	
6.	The PARTNER system will automatically calculate daylight savings, unless you specific NO.	YES: _____ NO: _____
7.	If any of your lines will not be 'touchtone' lines, write in the telephone number of each rotary line?	Rotary Lines:
8.	If any of your lines will be pooled together, circle POOL. Otherwise, if all your lines will operate independently circle KEY. *If you circled POOL, see Form F5 for more details.*	KEY POOL

Form E: Instructions

QUESTION 1: LINES PER EXTENSION:

For the PARTNER ACS processor or 308EC module the default setting assigns 3 lines to each extension.

For the 206 module the default setting assigns 2 lines to each extension.

For the 400 module the default setting assigns 4 lines to each extension.

QUESTION 2: RINGS BEFORE THE TRANSFER RETURNS:

By default a transferred call rings 4 times before it goes to the transfer return extension. If preferred setting is different than 4, write in the preferred number of ring. (Options are 1 through 9).:

QUESTION 3: SYSTEM PASSWORD:

The default setting is "No Password." If a password is desired, this password will be required to override dialing restrictions and to turn Night Service on and off.

QUESTION 4: POOL VS. KEY

Most PARTNER customers operate their lines in KEY mode. This mode works well for customers with a minimum number of incoming lines. (i.e., less than 5). In Key mode, the selected lines will show up as distinct buttons on each user's phone. The user can view the buttons to determine which lines are in use, and which are open before initiating a call. In HYBRID mode, some of the lines are pooled together. This pooling is transparent to the user. For instance if 3 lines are pooled under the company's main number, up to 3 users can select the button marked with that number before the pool is busy. This mode is appropriate for company's requiring a lot of lines.

If you wrote in POOL in this box, see Form F5. Pooling is only available for PARTNER ACS 2.0 or later. By default the system is configured for KEY mode.

Form E: Instructions

Forms F1-F5—System Configuration: Lists

In this form you need to create five different tables. One for each of the following:

- System Speed Dial

- Disallowed and Allowed Lists

- Hunt Groups

- Forced Account Code

- Pooled Lines

Form F1—System Speed Dial

Optional for PARTNER Advanced Communications System. For additional instructions, see next page.

To Dial: On system phones, press (Feature) + 3–digit code. On standard phones, press (#) + 3–digit code while receiving intercom dial tone.

Code	Name/Company	*[1]	Telephone No.[2]	Code	Name/Company	*[1]	Telephone No.[2]	Code	Name/Company	*[1]	Telephone No.[2]
600				630				659			
601				631				660			
602				632				661			
603				633				662			
604				634				663			
605				635				664			
606				636				665			
607				637				666			
608				638				667			
609				639				668			
610				640				669			
611				641				670			
612				642				671			
613				643				672			
614				644				673			
615				645				674			
616				646				675			
617				647				676			
618				648				677			
619				649				678			
620				650				679			
621				651				680			
622				652				681			
623				653				682			
624				654				683			
625				655				684			
626				656				685			
627				656				685			
628				657				686			
629				658				687			

1. You can dial System Speed Dial numbers that are marked with * at any time, regardless of dialing restrictions placed on your extension. System Speed Dial numbers are programmed by the System Manager (report problems and suggested revisions to your System Manager).

2. Telephone number can be up to 28 digits, including 0–9, *, #, and special dialing functions.

Form F1—System Speed Dial

Form F1—System Speed Dial Supplemental Instructions

With System Speed Dialing, a user can dial a stored number by pressing four buttons: the f button (# on a standard phone) followed by a 3-digit code. Storing a telephone number as a Speed Dial number lets users dial more quickly. Other kinds of numbers—such as account codes and other dialing sequences—also can be stored as Speed Dial numbers.

The system allows up to 100 System Speed Dial numbers that everyone on the system can use, as well as up to 20 Personal Speed Dial numbers for each extension (for the personal use of the extension user).

Please have the System Speed Dial Numbers form filled out when the technician arrives to install the system. After installation, photocopy this form and distribute a copy to everyone using the system. Users should keep this form near their phones for reference when placing calls.

General Guidelines

Each System Speed Dial number is assigned a 3-digit code from 600-699.

For example, suppose employees frequently call Acme Supplies and Acme's telephone number is stored for code 620. To call Acme, a user simply dials (Feature) ⑥ ② ⑩. If Acme moves, or the phone number changes, program the new telephone number and users still dial (Feature) ⑥ ② ⑩ to reach Acme.

Record the following information for each System Speed Dial number:

Name/Company

Write the name of the person or company to which the number belongs. For other types of numbers, such as account codes, enter a description of the number.

* Column (Marked System Speed Dial Numbers)

If users should be able to call a particular System Speed Dial number, regardless of any dialing restrictions placed on their extensions, "mark" the number so it can be dialed at all times. Mark the number by placing a check mark in this column, and by pressing * before the number when storing it.

For marked numbers, the stored number does not appear on a display phone when a user dials the Speed Dial code. Account codes cannot be marked.

Telephone Number

Write the number exactly as it should be dialed. Numbers can be up to 28 digits, including the digits ⓪–⑨, ⓧ, #, and the special dialing functions discussed next. To store a telephone number, include the dial-out code, toll-call prefix, and area code (if needed), along with the number.

Form F2a—Disallowed Lists

Disallowed Phone Number Lists {#404}															
Required only if Disallowed List Assignment {#405} is specified on Form B2. Write the telephone numbers that users are prevented from dialing.															
List 1		List 2		List 3		List 4		List 5		List 6		List 7		List 8	
Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]
01		01		01		01		01		01		01		01	
02		02		02		02		02		02		02		02	
03		03		03		03		03		03		03		03	
04		04		04		04		04		04		04		04	
05		05		05		05		05		05		05		05	
06		06		06		06		06		06		06		06	
07		07		07		07		07		07		07		07	
08		08		08		08		08		08		08		08	
09		09		09		09		09		09		09		09	
10		10		10		10		10		10		10		10	

1. Telephone Number can be up to 12 characters, including 0–9, * and #. Write ! for wildcard (press Hold to program).

Form F2b—Allowed Lists

Allowed Phone Number Lists (#407)															
Required only if Allowed List Assignment {#408} is specified on Form B2.															
Write the telephone numbers that users can dial regardles of assigned restrictions.															
List 1		List 2		List 3		List 4		List 5		List 6		List 7		List 8	
Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]	Entry	Telephone No.[1]
01															
02															
03															
04															
05															
06															
07															
08															
08															
10															

1. Telephone Number can be up to 12 characters, including 0–9, * and #. Write ! for wildcard (press Hold to program).

Form F2: Instructions for Creating Disallowed and Allowed Lists

Use this form to specify lists of Disllowed and Allowed telephone numbers.

You can create up to 8 lists each of Disallowed and Allowed telephone numbers. Each list can have up to 10 numbers.

1. Under the List number, write a name for the list (for example, "Suppliers").

2. In the "Telephone Number" column, write the entries for the list. You can specify complete telephone numbers or categories of numbers.

   ■ To specify a complete number, write it exactly as it would be dialed, including (if needed) a dial-out code, toll call prefix, and area code.

   ■ To specify a category, provide one or more entries to describe an entire class of calls (such as an area code or local exchange). Preventing calls to a category may require more than one entry, to allow for different ways of dialing a number (see "Examples of Disallowed List Entries").

After a list has been created, it can be assigned to an extension (see Form C).

Disallowed Phone Number Lists {#404}

With Disallowed lists, you can prevent users from dialing specific telephone numbers or categories (for example, calls to 976 exchanges for pre-recorded messages such as horoscopes, and calls to 900 area code "chat lines").

Examples of Disallowed List Entries

Preventing Calls to 976 Exchange Numbers

Preventing Calls to 900 Area Code

Preventing International (011) Calls

Preventing Use of a Specific Local Telephone Company Feature Consisting of a * and Two or Three Digits.

Allowed Phone Number Lists {#407}

Allowed telephone numbers are exceptions to restrictions. For example, you might put 976 numbers on a Disallowed list, but allow dialing of 976-1212 for weather reports. Or you might restrict an extension to local dialing only, but assign an Allowed list to permit the user to call specific customers or suppliers.

Form F3—Hunt Groups

Hunt Group Extensions (#505)																		
Assign Extensions to Hunt Groups										Assign Extensions to Hunt Groups								
Ext. Jack No.	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7 (Voice Mail)	Group 8 (Fax Detection)		Ext. Jack No.	Group 1	Group 2	Group 3	Group 4	Group 5	Group 6	Group 7 (Voice Mail)	Group 8 (Fax Detection)
10										30								
11										31								
12										32								
13										33								
14										34								
15										35								
16										36								
17										37								
18										38								
19										39								
20										40								
21										41								
22										42								
23										43								
24										44								
25										45								
26										46								
27										47								
28										48								
29										49								

Form F3: Instructions for Identifying Hunt Group Assignments

To assign extensions to any of the following groups (each extension can be in one or more groups), write the group number or place a check mark in the appropriate columns.

Hunt Group Extensions 1–6 {#505}

Calls can ring or be transferred to the first non-busy extension in a Hunt Group. A call rings at an extension in a Hunt Group three times; if it is not answered, it hunts to the next non-busy extension, continuing until someone answers or the caller hangs up. (If you voice signal a Hunt Group, only the first extension is signaled; the call does not keep hunting if there is no answer.) Incoming calls on specific lines can be directed to a Hunt Group using Group Call Distribution {#206}. Do not put PARTNER MAIL or PARTNER MAIL VS extensions in Hunt Groups 1–6.

VMS Only (Hunt Group 7)

For extensions where PARTNER MAIL or PARTNER MAIL VS is connected, check this box to assign the extension to Hunt Group 7. For PARTNER Voice Messaging, extensions 78 and 79 need to be assigned to Hunt Group 7. The system recognizes any extensions assigned to Hunt Group 7 as Voice Mail Service (VMS— PARTNER MAIL, PARTNER MAIL VS, or PARTNER Voice Messaging) extensions. Do not assign any extensions other than VMS extensions to Hunt Group 7. Also, do not assign PARTNER MAIL, PARTNER MAIL VS, or PARTNER Voice Messaging extensions to any other Hunt Groups, to any Calling or Pickup Groups, or to the Night Service Group.

Fax Only (Hunt Group 8)

Hunt Group 8 is used only for fax detection and transfer. Do not assign any extension other than fax extension to Hunt Group 8.

Form F4—Forced Account Code

Forced Account Code List {#409}								
Entry	Account Code (up to 6 digits)[1]	Write Description	Entry	Account Code (up to 6 digits)[1]	Write Description	Entry	Account Code (up to 6 digits)[1]	Write Description
01			34			67		
02			35			68		
03			36			69		
04			37			70		
05			38			71		
06			39			72		
07			40			73		
08			41			74		
09			42			75		
10			43			76		
11			44			77		
12			45			78		
13			46			79		
14			47			80		
15			48			81		
16			49			82		
17			50			83		
18			51			84		
19			52			85		
20			53			86		
21			54			87		
22			55			88		
23			56			89		
24			57			90		
25			58			91		
26			59			92		
27			60			93		
28			61			94		
29			62			95		
30			63			96		
31			64			97		
32			65			98		
33			66			99		

1. Valid entries are 0–9; write ! for wildcard (press Hold to program).

Form F4—Forced Account Code

Form F4: Instructions for Forced Account Codes

Forced Account Code List {#409}

If an extension has been designated for Forced Account Code Entry {#307} on Form F4, the user must dial an account code before an outside telephone number can be dialed. Account codes, each up to 16 digits in length, can be used to associate telephone calls with a particular department or client. Account codes print on SMDR call reports and on reports generated by call accounting packages.

If Forced Account Code Verification is desired, entries must be made in the Forced Account Code List {#409}. When the system verifies an account code, it compares only the first six digits of the user-entered account code to the entries in the Forced Account Code List. For a match to be successful, the user must dial at least the account code's associated list entry, even though the user can dial up to 16 digits for an account code. Wildcard entries are allowed on this list.

(Release 3.0 or later only) Users can dial "911" without entering an account code.

Form F5—Customized Extensions/Pool Access Restrictions

Ext. Jack No.	Identify Extension Settings if different from default										Hybrid Mode only		Identify Line Ringing (CTP) Option if different from default				Identify Restrictions/Permissions if different from default						Identify Group Assignments						
	Display Language (#303)	Auto Ext Privacy (#304)	Abbreviated Ringing (#305)	Forced Acct Code Entry (#307)	Distinctive Ringing (#308)	Automatic VMS Cover (#310)	Voice Interrupt On Busy (#312)	Call Coverage Rings (#320)	VMS Cover Rings (#321)	Line Access Mode (#313)	List individual lines (#301) for Pooled Extensions		Immediate lines	Delayed	No Ring pools	Line/Pools Not Assigned	OUT only	IN only	NO Access	Outgoing Call Restriction (#401)	Disallowed List Assignment (#405) 1-8	Allowed List Assignment (#408) 1-8	Pickup Group Extensions (#501) 1-4	Calling/Page Group Extensions (#502) 1-4	Hunt Group Extensions (#505) 1-6	VMS Only 7	FAX Only 8	Night Service Group Extensions (#504)
	E√	NA √	A√	NA √	A√	NA √	NA√	2√	3√	P√	NA √		√		√					NR √	NA √		NA √	NA √	NA √	NA√	NA√	NA√
10										K	ALL																	
11																												
12																												
13																												
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31																												
32																												

Form F5—Customized Extensions/Pool Access Restrictions

Form F5—Customized Extensions/Pool Access Restrictions *(Continued)*

Ext. Jack No.	Identify Extension Settings if different from default											Hybrid Mode only	Identify Line Ringing (CTP) Option if different from default				Identify Restrictions/Permissions if different from default							Identify Group Assignments					
	Display Language (#303)	Auto Ext Privacy (#304)	Abbreviated Ringing(#305)	Forced Acct Code Entry (307)	Distinctive Ringing (#308)	Automatic VMS Cover (310)	Voice Interrupt On Busy (312)	Call Coverage Rings (320)	VMS Cover Rings (321)	Line Access Mode (#313)	List individual lines (#301) for Pooled Extensions		Immediate	Delayed	No Ring	Line/Pools	Outgoing Call Restriction (#401)			Disallowed List Assignment (#405)	Allowed List Assignment (#408)		Pickup Group Extensions (#501)	Calling/Page Group Extensions (#502)	Hunt Group Extensions (#505)	VMS Only	FAX Only	Night Service Group Extensions(#504)
	E/ NA ✓	A✓/ NA ✓	A✓	NA ✓	NA ✓		2✓	3✓	P✓	NA ✓			✓ lines	Delayed	✓ pools	Not Assigned	OUT only	IN only	NO Access	NR ✓	NA ✓		NA ✓	NA ✓	NA ✓	7	8	NA ✓
34																												
35																												
36																												
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Form F5—Customized Extensions/Pool Access Restrictions (Continued)

Form F5: Instructions for Pool Access Restrictions

Pool Access Restriction {#315}

By default, access to all lines and pools is set to No Restriction. To change the default, write the line numbers or pool access codes in the appropriate columns, as follows:

Outgoing only–User can place outside calls and receive only transferred calls on specified line or pool.

Incoming only–User cannot place outside calls but can receive calls on specified line or pool.

No Access–User cannot place or receive outside calls on specified line or pool (but can receive transferred calls, pick up calls on hold, or join calls in Key mode and on key extensions in Hybrid mode).

NOTE: Pool Access Restriction for key extensions in Hybrid mode is set to No Access. Pooling and Hybrid mode are available only if you are using PARTNER ACS R2.0 or later.

Outgoing Call Restriction {#401}

Write "IN" or "LOC" to indicate restrictions for all outgoing calls on all lines at that extension, as follows:

IN–User can make only intercom calls to other system extensions.

LOC–User can make only intercom and local outside calls (no calls that require a "0" or "1" prefix).

Any available outside lines can still be used to dial numbers on an Allowed Phone Number List assigned to the extension, numbers on the Emergency Phone Number List, or Marked System Speed Dial numbers.