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Meridian 1

# **Option 11C Compact MAT 6**

## Introduction Guide

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# About This Guide

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Welcome to Nortel's complete communications product for the small business Meridian 1 Option 11C Compact!

This is an introduction guide to help you get acquainted with MAT 6, specifically for Option 11C Compact. This guide complements the existing MAT documentation suite. The other MAT documents in your Option 11C Compact package are not based on any particular Meridian 1 switch.

*MAT* stands for Meridian Administration Tools. This is the PC software that will help you manage your phone (PBX) system. Hereafter, we refer to this software as simply *MAT for Compact*.

This guide provides the following:

- general information about your new PBX system
- guidelines for installing and configuring MAT for Compact at your site, if this has not already been done
- an orientation to MAT for Compact and instructions for performing common administration tasks for your PBX system
- pointers to related Nortel documents where you can find more information, and to optional MAT applications for adding software capabilities that you might want

## Who this guide is for

We provide this guide for two audiences:

- mainly for the customer who will use MAT for Compact to manage the day-to-day needs of their company's PBX system
- also for the distributor technician who may need guidance for installing and configuring MAT for Compact

**Note:** The customer will need important switch configuration and system ID/password information that the technician can provide. Appendix B provides tables for recording this required information.

Often the technician installs all of the MAT software, and may configure the software and provide training for the customer as well. Sometimes, however, the customer needs to install and configure the software. In either case, the installer can find guidelines for ["Installing MAT For Compact" on page 9](#), followed by guidelines for ["Configuring MAT For Compact" on page 13](#).

## What you need to know

MAT for Compact runs on a PC using Windows 95, Windows 98, or Windows NT Workstation 4.0. Familiarity with Windows operating systems is helpful for using MAT for Compact.

Some MAT for Compact customers have a limited understanding of *PBX systems*. These are the phone systems that operate within companies or buildings. Also, some MAT for Compact customers have no previous exposure to Nortel's MAT software. Whatever your level of experience may be, this guide is the best place to begin.

So put on your administrator's cap. Soon you will be up and running!

## Conventions used in this guide

This guide uses the following typographical conventions:

- User input—**This font** alerts you to information that you enter on your keyboard; or, using your mouse, this font indicates buttons to click or menu selections to make.
- Multi-lettered keys—Angle brackets denote a single multi-lettered key on your keyboard. For example, **<Esc>** denotes the Escape key, labeled *Esc* on PC keyboards.
- Key sequences—Keys that you press at the same time include at least one multi-lettered key and are not separated by spaces in text. For example, **<Alt>V** instructs you to press the **<Alt>** and **V** keys at the same time.
- Hot keys—You can access menu commands by using the mouse or your keyboard. Menu items show one letter as underlined. To choose a menu item from the keyboard, hold down the **<Alt>** key and press the underlined key. For example, press **<Alt>F** to open the **File** menu.
- *Windows* refers to the Microsoft family of graphical user interface (GUI)-based operating systems.

## Where to go for more information

We provide you with other guides and online information:

- See the guides entitled *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide* and *MAT 6 User Guides Volumes 1 and 2*. The guides are part of your complete product package.
- All MAT for Compact commands are completely defined in the online help. You can access help topics and context-sensitive help from the Help Menu of the Navigator, System, and application windows. You can also access context-sensitive help by clicking the **Help** button in any of the program's dialog boxes, or by pressing the **<F1>** key after selecting (highlighting) any field.

## How to get help

Contact your distributor technician if you have problems that are specifically related to your phone switch or MAT for Compact installation. Your distributor may provide MAT for Compact training as well.

# About The Product

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Your product package includes the following:

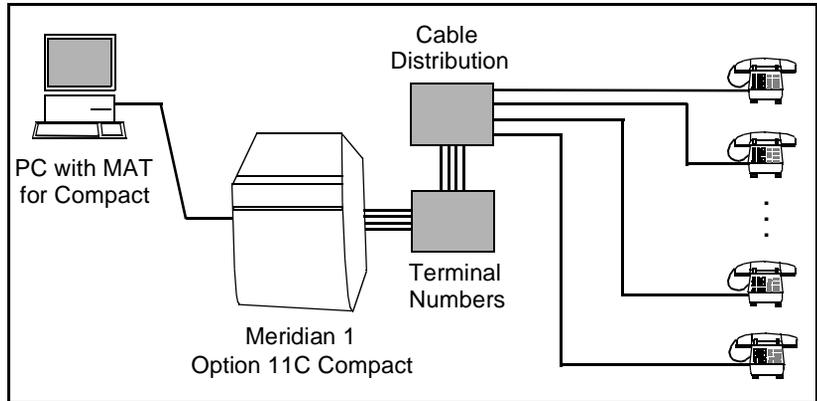
- Meridian 1 Option 11C Compact phone switch
- hardware security dongle (a small connector that plugs into your PC's parallel port), with serial number and keycode
- MAT 6 software on CD-ROM
- this guide and the guides entitled *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide* and *MAT 6 User Guides Volumes 1 and 2*.

## Your PBX system

The Meridian 1 Option 11C Compact switch is the center of your PBX system. Peripheral devices such as telephone sets and fax machines connect to this switch through pre-wired ports (modular phone jacks). Each active phone jack at your site has a corresponding *terminal number* (full hardware address) on the phone switch.

MAT for Compact knows these hardware addresses and other switch data. This is how MAT for Compact selectively manages each device in your PBX system.

**Figure 1**  
**Meridian 1 Option 11C Compact PBX system**

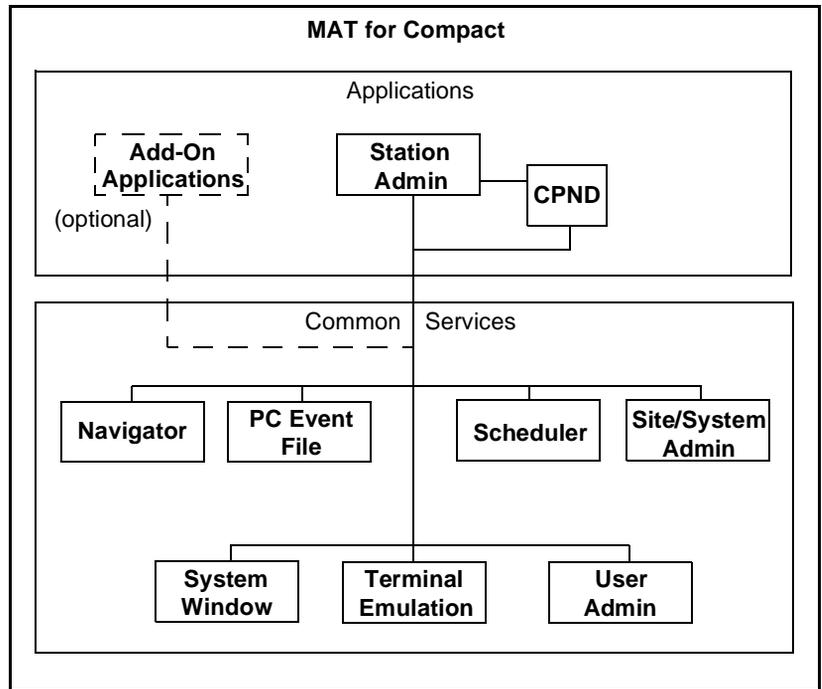


## MAT 6 for Option 11C Compact

MAT for Compact runs on a PC using Windows 95, Windows 98, or Windows NT Workstation 4.0. MAT for Compact includes Nortel's Station Administration application and Common Services. Station Administration and its sub-application Call Party Name Display (CPND) are user applications. Common Services includes basic MAT features and functions that support these applications. [Figure 2](#) is a diagram of the MAT for Compact components and their relationships. See [Table 1](#) on [page 8](#) for a brief description of each component.

As new functions and features become available for Option 11C Compact, these are reflected in MAT. To access the latest features, select the correct machine type (11C Compact) and the most recent software release in the System Data tab in the System Properties page for a particular Option 11C Compact. MAT uses machine type and software release information to identify various systems.

**Figure 2**  
**Basic components of MAT for Compact**



The Add-On Applications box in Figure 2 represents optional MAT applications for adding capabilities to MAT for Compact. Your distributor can help you license and activate any applications that you request. For more information, see Appendix A on [page 55](#).

A brief introduction to the basic components in MAT for Compact follows:

**Table 1**  
**Introduction to MAT for Compact's components**

Component	Description
Station Administration	This primary application simplifies day-to-day adds, moves, and changes for different types of single and multi-lined telephones. Station Administration enables you to configure and program features for each <i>station</i> (telephone set, modem, fax machine, etc.).
Call Party Name Display (CPND)	This sub-application of Station Administration lets you manage single and multi-line CPND information. CPND displays the source of an incoming call at the called station.
Navigator	This main window allows access to all MAT systems and services. The Navigator window shows the names and types of currently available systems, for example, MAT for Compact's sample system and your site's system.
PC Event File	From the <b>Maintenance</b> menu in the Navigator window you can open a PC Event File window to quickly view a log of important PC system events.
Scheduler	From any supported application, for example, Station Administration, you can schedule tasks such as system updates.
Site and System Administration	From the <b>Configuration</b> menu in the Navigator window you can add, change, and delete sites and systems. A <i>site</i> is a physical location that includes one or more systems.
System Window	From the Navigator window you can open one or more System windows. A <i>system</i> is a configuration that you define for your phone switch. The System window is where you launch Station Administration, CPND, and any add-on applications that you purchase separately.
Terminal Emulation	From the <b>Maintenance</b> menu in the System window you can open a System Terminal window to directly connect to the phone switch. There you can access overlay programs by virtue of your serial, Ethernet, or PPP connection.
User Administration	From the <b>Security</b> menu in the Navigator window you can open the MAT Users window to create and update templates that define user access and connections.

# Installing MAT For Compact

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Often the distributor technician installs MAT for Compact, in which case the customer can skip this chapter. Sometimes, however, the distributor technician installs the phone switch and peripheral hardware, and then asks the customer to install MAT for Compact. If this is your situation, use the guidelines in this chapter to ease your task.

MAT for Compact includes the MAT 6 software on CD-ROM.

## What this task requires

These are your considerations as system administrator:

- Allow one to two hours to comfortably complete this installation. It is safer to carefully handle all of the details in one sitting than to interrupt the process.
- You can *configure* MAT for Compact on a separate occasion, using the guidelines under [“Configuring MAT For Compact” on page 13](#). Note, however, that you cannot use the software to manage your PBX system until it is both installed and configured.
- Have ready the MAT 6 CD-ROM.
- Have ready the *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide* and *MAT 6 User Guides Volumes 1 and 2*. The guides are part of your complete product package.
- Scan the *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide* to gauge the complexity of its procedures. These procedures will be easier to follow if you are familiar with Windows operating systems.

## Installation guidelines

The distributor technician usually establishes the required physical connection between the Meridian 1 Option 11C Compact phone switch and the PC on which MAT for Compact will be installed. The first guidelines in this section are for making the physical connection. Then guidelines are provided for installing MAT for Compact.

## Connecting Your PC to the Option 11C Compact Switch

Designate a PC running Windows 95, Windows 98, or Windows NT Workstation 4.0 as the PC on which you will install MAT for Compact. Before connecting this PC to the phone switch, make sure the PC can meet hardware and software requirements. In the *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide*, refer to “Step 3: Checking PC Hardware and Software” in the chapter “Setting Up Your MAT Environment.”

You can connect the designated PC to the Option 11C Compact phone switch by using either a serial connection or an Ethernet connection.

### Serial Connection

The Option 11C Compact switch provides three serial ports (0, 1, and 2) on the bottom left of the backplane below the CPU pack. You can configure the PBX software for these serial ports in LD17. Refer to “LD17” in the *Option 11C Compact Input/Output Guide*.

### Ethernet Connection

The Option 11C Compact switch provides a 10 Mbps Ethernet connector on the bottom left of the backplane below the CPU pack. This 15-pin connector provides a standard attachment unit interface (AUI) connection point for a media attachment unit (MAU). You can configure the PBX software for the Ethernet port in LD117. Refer to “LD117” in the *Option 11C Compact Input/Output Guide*.

## Installing MAT for Compact

Use the following instructions if either of these situations applies:

- You are installing MAT for the first time.
- You are changing the Windows operating system.

**Note:** If you are upgrading from MAT 5 to MAT 6 and planning to stay on Windows 95, refer to the *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide*.

Open the *Meridian Administration Tools MAT 6 Installation and Upgrades User Guide*. The following chapters are valid for installing MAT for Compact:

- “Setting Up Your MAT Environment”

Do steps 1 through 3: “Preparing a network plan,” “Checking Meridian 1 requirements,” and “Checking PC hardware and software.”

Do step 4: “Setting up Windows networking for MAT.”

Follow the appropriate instructions (Windows 95, or Windows 98 or, Windows NT Workstation 4.0).

Do step 5: “Setting up the PC communications environment.”

Most sites use PC serial communications. If your site uses Ethernet communications, follow the appropriate instructions and also do step 6: “Testing ethernet and PPP connections.”

Do step 7: “Setting up the server environment,” if you are setting up MAT 6 on a server.

- “Installing MAT 6 Software”

Use the procedure “Installing and upgrading MAT 6 on a stand-alone PC.”

Do steps 2 through 15, step 17, and steps 20 through 22:

- Plug your security dongle into your PC’s parallel port in step 2. The connector on the back of the dongle lets you reconnect a printer or other device that was previously connected directly to the parallel port.
- Use your MAT 6 CD-ROM in step 6.

— Use your MAT for Compact serial number and keycode in step 13.

- “Validating the MAT 6 Installation”

Use the entire procedure.

This procedure uses MAT for Compact’s sample system to complete important installation tasks and connect to your phone switch.

- “Adding Applications or Licenses”

Use this procedure to install any optional MAT applications that you order after the initial installation. See Appendix A on [page 55](#).

# Configuring MAT For Compact

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If the distributor technician installed MAT for Compact, he or she may have proceeded to configure your site and system in the program. If this is the situation, the customer can skip this chapter. Otherwise, use the guidelines in this chapter to configure MAT For Compact.

Each PBX system is unique. You must configure MAT for Compact before you can use the software to manage your system. This task includes the following procedures:

- defining a site  
A *site* is a physical location that includes one or more systems.
- defining a system  
A *system* is a configuration for your phone switch.

## What this task requires

These are your considerations as system administrator:

- Allow up to one hour for configuring your site and system, though you may complete this task in much less time.
- Have ready the *Meridian Administration Tools MAT 6 User Guides*. The guides are part of your complete product package. In the guides, you will need to refer to the *MAT 6 Common Services User Guide*.
- You perform these procedures from the Navigator window, which is the main window in MAT for Compact.

## Configuration guidelines

Open the *Meridian Administration Tools Common Services User Guide* to the chapter entitled “Configuring Sites, Systems, and Users.” The following parts of this chapter are valid for configuring MAT for Compact:

— “Changing the Default Login Password”

Use this procedure to start MAT for Compact if the program is not already running, and to change the default User ID and Password if you are running the program for the first time. This procedure opens the Navigator window.

**Note:** This procedure is also documented on [page 18](#) of this introduction guide.

— “Site and System Administration”

Use the procedure “Adding a site” to configure your site.

— “Site and System Administration”

Use the procedure “Adding a system” to configure your system.

- Do steps 1 through 6.

For step 6, most sites use PC serial communications. Use the instructions for Ethernet communications if appropriate.

- Do steps 8 through 10.

For step 10, you need to enter a User ID and Password for the switch in the **General** tab of the Customer property sheet. This information is provided by the distributor technician. See [Table 7](#) on [page 59](#).

In the **Numbering Plans** tab, you need to insert a number range that includes all of your PBX system’s extensions, called *directory numbers* in MAT for Compact. Typically, the customer develops their Numbering Plan.

Return to the Navigator window to complete your system configuration:

- 1 Double-click your *new* system icon to open the System Window.
- 2 Choose **Update System Data** from the **File** menu.
- 3 Select the options **Update Data Stored in the PC** and **Do it Now**, then click **OK**.  
  
MAT for Compact initiates a connection with the switch and *retrieves* system data. This means system data is copied from the phone switch into MAT for Compact on your PC.
- 4 Right click your new system icon and select **Properties**.  
  
This opens the System Properties Sheet.
- 5 Click on the **System Data** tab and verify that the Machine field specifies **11C Compact** and that the Release field specifies **1**.
- 6 Click **OK** to return to the Navigator window.

## Changing your configuration

You can easily change any information about your site or system. For example, you may want to change your site's name or address. Or, you may want to change your system's name or customer (user) information.

To change site or system information:

- 1 Select the desired site or system in the Navigator window.
- 2 Choose **Properties** from the **File** menu.  
  
This opens the property sheet for that site or system.
- 3 In the property sheet, select the tabs containing information you want to change.
- 4 Edit the fields you wish.  
  
Some fields have a popup menu for selecting items, or a drop-down list of choices (indicated by an arrow in the field). Bolded fields indicate required information.
- 5 Click **OK** to save your changes and return to the Navigator window.  
  
Alternatively, you can click the **Apply** button to save your changes while keeping the property sheet open.

Alternatively, you can add *another* site or system by using the instructions under [“Configuration guidelines” on page 14](#). Consider doing this if you decide to expand your facility, or if you want to separate areas of your PBX system to configure those areas differently.

To delete a site or system:

- 1        Select the site or system in the Navigator window.  
**CAUTION:** Deleting a site also deletes all of its systems.
- 2        Choose **Delete** from the **Edit** menu and click **OK**.

---

# Starting And Using MAT For Compact

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This chapter shows you how to start MAT for Compact and gives you an orientation for using the program. To use the program, you will open its Navigator window, then a System window, and finally the desired application. This is the sequence given in this chapter.

At this point, MAT for Compact should already be installed and configured for your PBX system. If so, you are ready to start the program.

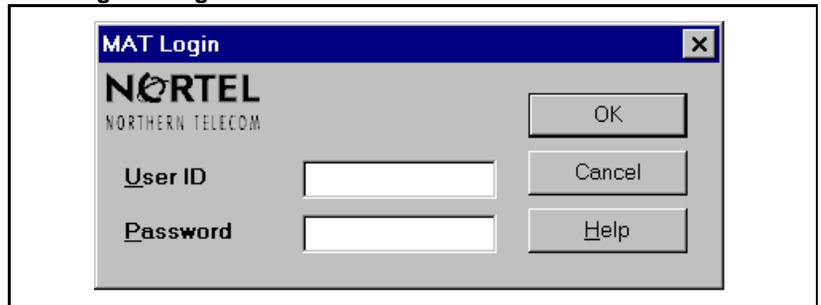
## Start the program

Start up MAT for Compact. The installation process has added the MAT icon to your Windows **Start** menu.

- 1 From the **Start** menu, select **Programs**, then **MAT**.

A MAT Login dialog box appears.

**Figure 3**  
**MAT Login dialog box**



- 2 If you previously set up your User ID and Password, type in this information and click **OK**.

After the program accepts your ID and password, the Navigator window opens.

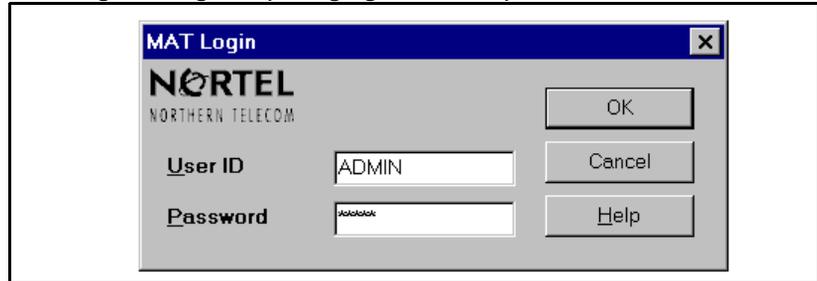
**Note:** If you are running this program for the first time, go to [“Change the default login” on page 18](#).

## Change the default login

Follow these steps if you are running MAT for Compact for the first time, or if you have not previously changed the default User ID and Password:

- 1 In the MAT Login dialog box, type in the default User ID and Password **ADMIN** and click **OK**.

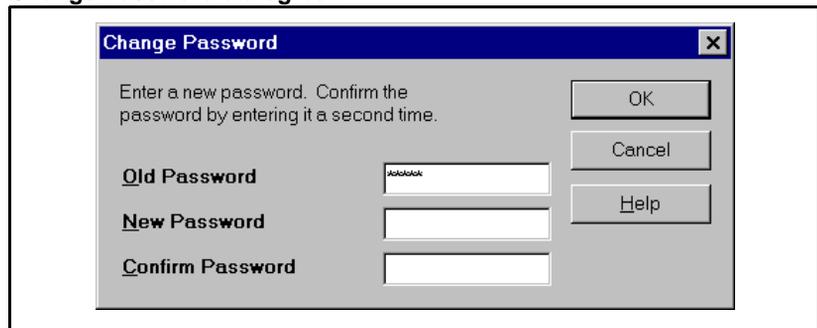
**Figure 4**  
**MAT Login dialog box (changing the default)**



This opens the Navigator window.

- 2 In the Navigator window, choose **Change Password** from the **Security** menu to open the Change Password dialog box.

**Figure 5**  
**Change Password dialog box**

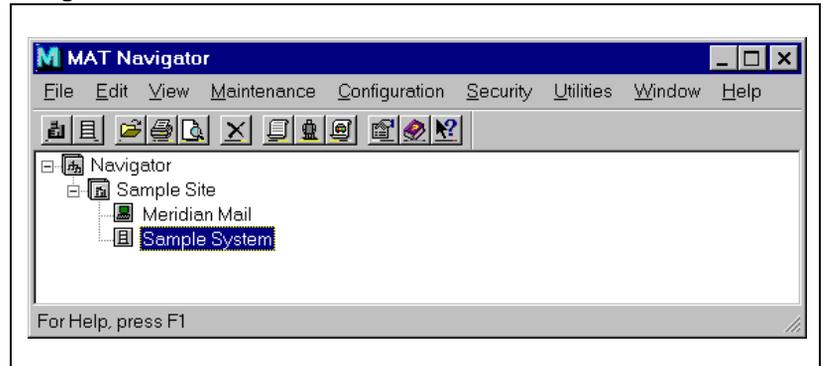


- 3 Type the default password in the Old Password field. Type your new password in the New Password and Confirm Password fields, and then click **OK**.
- 4 Click **OK** in the message box to confirm your password change.

## Your orientation

The Navigator is MAT for Compact's main window. All MAT systems and program features are available in or through this window.

**Figure 6**  
**Navigator window**



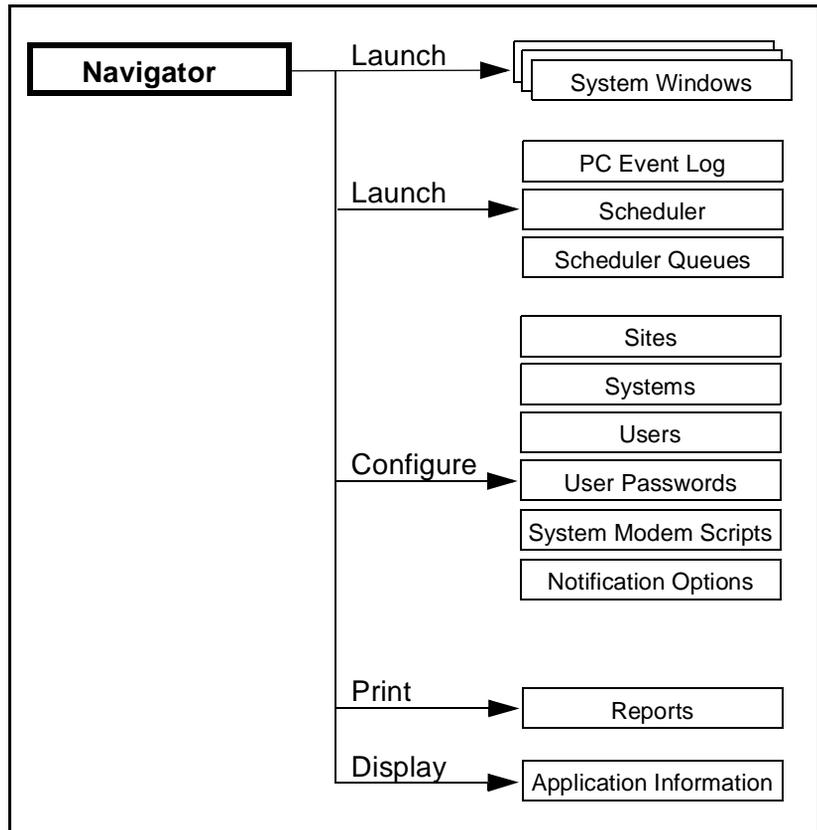
## What Navigator does

The Navigator gives you these capabilities:

- Allows you to define and redefine sites and systems for your business
- Displays a tree structure of the site(s) and system(s) defined for your business, plus MAT for Compact's sample site and system. You access a system by opening its site in Navigator, for example, the Sample Site shown in Figure 6.
- Lets you launch your System window(s) by name, for example, the Sample System highlighted in Figure 6
- Helps you manage all phone-system functions and data by site, system, station, and user
- Allows you to launch utility applications, for example the Scheduler
- Allows you to display licensing and release information for MAT for Compact and any add-on applications that you purchase separately

Figure 7 illustrates basic Navigator functions. For more details, see your *MAT 6 Common Services User Guide*.

**Figure 7**  
**Navigator functions**



## Opening a site and launching a system

The Navigator allows you to access any defined system. In the Navigator, you open a site to choose a system on which to work.

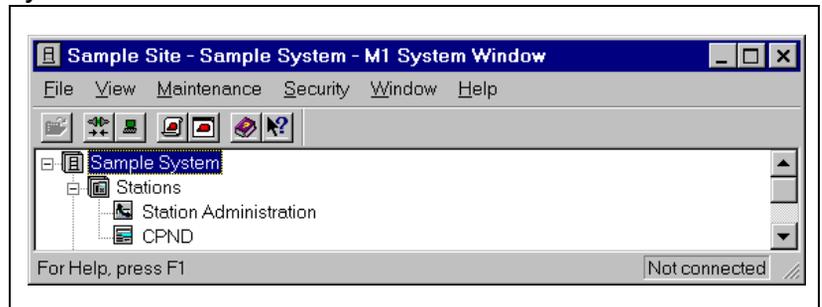
- Open a site by double-clicking its icon or name, or by clicking the “+” symbol next to the site. The “+” changes to a “-” when the site opens. An open site displays all systems defined for that site. Close a site by clicking the “-” symbol.
- Double-click a system to launch its System window and launch applications for working on that system.

For Meridian 1 (M1) systems, the components that make up the system appear in the System window. For non-M1 systems, or for an application such as Meridian Mail, MAT for Compact displays a terminal emulation window.

## Using a System window

From the Navigator, launch MAT for Compact’s sample system to open its System window.

**Figure 8**  
**System window**

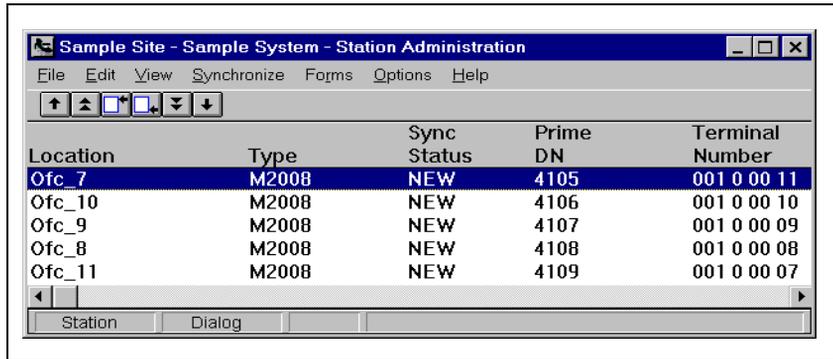


The System window is where you launch applications for working on that system. These applications include Station Administration, CPND, and any add-on applications that you purchase separately.

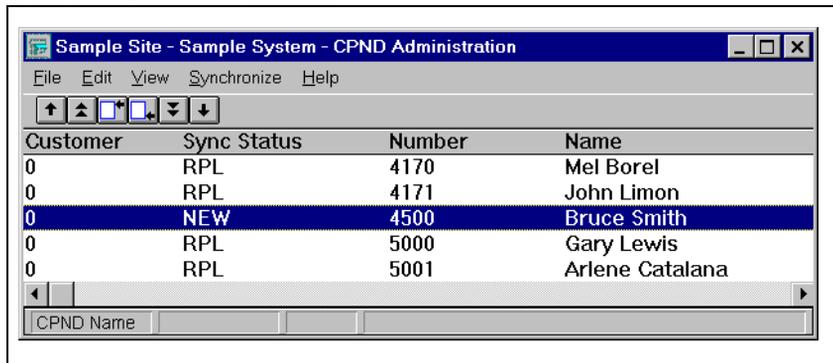
## Opening and launching your applications

Open and launch the Station Administration or CPND application from the System window by double-clicking its icon or name.

**Figure 9**  
**Station Administration window**



**Figure 10**  
**CPND Administration window**



## Scrolling and selecting entries

Use the up and down arrow keys or Page Up and Page Down keys to view all entries in application windows. Click an entry to select it. Then double-click the highlighted entry to view its associated data.

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# Performing Administration Tasks

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This chapter shows you how to use MAT for Compact to perform common administration tasks for your PBX system.

These are common tasks, most of which you are likely to perform. Do the synchronization task first. Do the next three tasks in the order given.

- Synchronizing the program with your switch
- Designating a line card
- Defining a template
- Adding a telephone (using a template)
- Moving a telephone
- Adding a voice mailbox
- Changing the prime directory number
- Changing the Call Party Name Display
- Generating basic reports

To find more information than we provide here, look in the guides entitled *Meridian Administration Tools MAT 6 User Guides*. In Volume 1, refer to the *Station Administration User Guide*.

## Common terms

Here are definitions for common terms used in the procedures that follow:

**Table 2**  
**Common terms**

Term	Definition
Prime Directory Number (DN)	The primary extension assigned to a telephone or other device that is connected to your PBX system
Station	A peripheral device such as a telephone, modem, or fax machine that is connected to your PBX system
Terminal Number (TN)	A hardware address on the phone switch that corresponds to a phone jack (or port) where a station is connected

## Synchronize the program with your switch

The purpose of this task is to ensure that MAT for Compact and the phone switch share the same data. This is a task to perform whenever changes are made at the switch or in the program.

On your PC, MAT for Compact has a database of stored PBX-system data. The phone switch has a corresponding database. When you synchronize the program with your switch, one is given an accurate reflection of the other.

Usually the first synchronization task after installing a new PBX system is to retrieve all station and CPND data from the phone switch. This downloads data from the Meridian 1 database (on the switch) into the MAT for Compact database (on your PC). Thereafter you will most often transmit (upload) selected data from your PC to the switch. This will keep the switch's data current with settings that you change in the program.

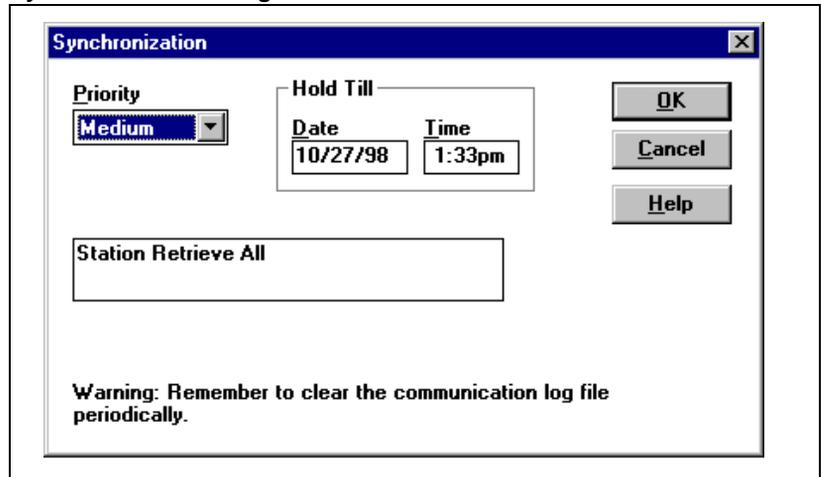
## Procedure

**Note:** This procedure retrieves initial station and CPND data from the switch, assuming your distributor technician has already configured that data. If your technician has synchronized the switch and program already, you can still use this procedure to learn how synchronization works.

Begin in the Station Administration window of your system.

- 1 Select **Retrieve All** from the **Synchronize** menu.
- 2 In the Station Retrieve All dialog box, click **OK**.  
This opens the Synchronization dialog box.

**Figure 11**  
**Synchronization dialog box**



- 3 In the Synchronization dialog box, click **OK** to retrieve station data immediately (at present date and time).
- 4 Verify the retrieved station data in the Station Administration window.  
Data retrieved from the switch will have a Sync Status of **TRN** (for *transmit*) in each station entry. This means that the station data you are viewing in MAT for Compact is synchronized with the switch's data.
- 5 Close Station Administration and launch CPND Administration.
- 6 Select **Retrieve All** from the **Synchronize** menu.

- 7 In the Call Party Name Display Name Retrieve dialog box, click **OK**.  
This opens the Synchronization dialog box.
- 8 In the Synchronization dialog box, click **OK** to retrieve CPND data immediately (at present date and time).
- 9 Verify the retrieved CPND data in the CPND Administration window.  
Retrieved CPND data will also have a Sync Status of **TRN**.

## More to learn

To update the switch's data with changes in MAT for Compact, use the **Synchronize - Transmit** function in your Station Administration and CPND windows. You can use the **<Shift>** key with your mouse to select (highlight) multiple entries to transmit.

Each time that you add, change, or delete station or CPND data, the program prompts you to schedule data transmission to the switch, but only if the program is in Maintenance mode. We recommend that you set Maintenance mode. You can do this by selecting **Mode** from the **Options** menu in the Station Administration window.

The Sync Status field in the Station Administration and CPND windows is important. Sync Status in MAT for Compact can be any of the following:

- **NEW** for newly defined station or name data in MAT for Compact that has not been uploaded to the switch
- **CHG** for station or name data that has been changed in MAT for Compact, but has not been uploaded to the switch
- **RPL** for station or name data in MAT for Compact that you have defined to replace previously synchronized data on the switch
- **OUT** for station or name data deleted in MAT for Compact that has not yet been deleted on the switch
- **TRN** for *synchronized* station or name data, data that has been transmitted (uploaded) to the switch

Once you transmit data to the switch, station and CPND entries that are retained (not deleted) receive a **TRN** status in MAT for Compact. Entries for deleted stations (with a Sync Status of **OUT**) are removed from MAT for Compact.

## Designate a line card

The purpose of this task is to define the switch's hardware configuration for any station that you hereafter add to your PBX system. In MAT for Compact, *hardware configuration* refers to a line card and its exact location in your switch. MAT for Compact allows three possible cards to be added to your system. These cards include the digital line card (NTMW05AA), analog line card (NTMW06AA), and analog trunk line card (NTMW07AA).

This task must be performed before you add a station for the first time. Usually the distributor technician will have performed this task already. However, we recommend that you follow this brief procedure to ensure the proper configuration.

Once you have designated an appropriate line card in MAT for Compact, you do not need to repeat this procedure unless you run out of voice and data ports and need your technician to install another card in your phone switch.

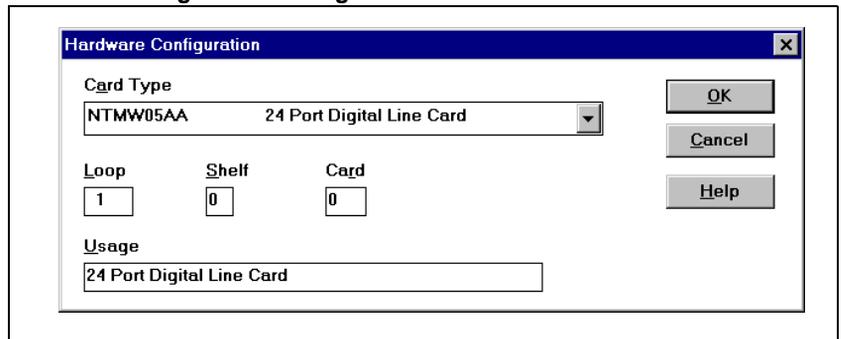
### Procedure

Begin in the Station Administration window of your system.

- 1 Select **Hardware** from the **View** menu.
- 2 Select **Add** from the **Edit** menu.

This opens the Hardware Configuration dialog box.

**Figure 12**  
**Hardware Configuration dialog box**



**Note:** In the Hardware Configuration dialog box, you will need to enter the type and location of an appropriate peripheral equipment (line) card installed in your switch. See [Table 6](#) on [page 58](#) for this information.

- 3 In the Hardware Configuration dialog box, enter the appropriate information and click **OK**:
- For Card Type, select the appropriate card in your switch, for example, the **NTMW05AA 24 Port Digital Line Card**.
  - For Loop, enter the slot number where that card is installed, for example, **1**.
  - For Shelf and Card, enter **0**. No other number is appropriate.

Now you can add one or more stations to your PBX system. To make that task easier, first use the procedure [“Define a template” on page 29](#).

## More to learn

In MAT for Compact, the terminal number for a station is the full hardware address for the phone jack (or port) to which the station is connected. The hardware addresses are derived from your switch’s configuration, that is, each line card’s location and number of ports. Terminal numbers have the following format:

*lll s cc nn*

where *lll* is the Meridian 1 loop (line-card slot) number, *s* is the shelf number, *cc* is the shelf card position, and *nn* is the line card’s port number. For example, if your digital-line card is installed in slot 1 and a given station uses port 14, its terminal number would be:

*001 0 00 14*

In MAT for Compact, the significant digits are the line card’s slot number (at left) and port number (at right). Shelf number and shelf card position (the middle numbers) are always zero.

If you have questions about the line cards in your phone switch and the capabilities these cards provide for your PBX system, please consult your distributor.

## Define a template

The purpose of this task is to make it easy for you to add new stations to your PBX system. You can store data that is common to stations of a specific type in a MAT for Compact template. A template can contain most settings that you define for stations, such as key features and station features. Templates shorten the task of adding multiple stations.

### Procedure

Begin in the Station Administration window of your system.

- 1 Select **Template** from the **View** menu.
- 2 Select **Add** from the **Edit** menu to open the Add Template dialog box.
- 3 Select your most common instrument (type of device), for example, **M2008 2008 Digital**.
- 4 Click **OK** to open the property sheet for the instrument you selected.

**Figure 13**  
**M2008 property sheet (defining a template)**

The screenshot shows the 'M2008' property sheet dialog box. The window title is 'M2008'. The dialog is divided into several sections:

- Top Left:** Two text input fields labeled 'First Name' and 'Last Name'.
- Middle Left:** A scrollable list of horizontal lines, likely representing a list of features or options.
- Bottom Left:** A keypad with buttons for 'Program', 'Key 6', 'Key 5', 'Key 4', 'Key 3', 'Key 2', 'Key 1', and 'Key 0'. There are also navigation buttons '<<' and '>>'.
- Right Side:** A series of input fields and buttons:
  - 'Customer': A dropdown menu showing '0'.
  - 'Location': A text input field containing 'M2008\_Templ'.
  - 'Department': A text input field.
  - 'Terminal Number': A text input field.
  - 'Hunt to': A text input field.
  - 'External Hunt to': A text input field.
  - 'Call Forward NA to': A text input field.
  - 'External Call Forward NA to': A text input field.
- Bottom Right:** A vertical stack of buttons: 'OK', 'Cancel', 'Features', 'Admin..', 'Validate', and 'Help'.

- 5 In the Location field, you must enter a unique identifier (up to 12 characters) for your template. For example, enter **M2008\_Templ**.  
You can disregard the Customer Number field. It is always **0**.
- 6 In the rest of this property sheet, define all desired features that you consider generic for the telephones you will add:  
**Note:** Do not define fields that are unique to each station: the station user's name and the location, terminal number, and extension (directory number) of a station.
- Click on a numbered key to open the Key Assignments dialog box and select a single feature for that key. For example, select the 6-Party Conference feature for Key 1, and click **OK**.
  - Click **Features** to open the Features dialog box and set characteristics of the telephone. Click (highlight) a feature of interest, and then click **Select** to open that feature's property sheet. Change settings as you wish and click **OK**. When you are finished, click **Done** to return to the device property sheet.
- Note:** To get more information about particular features and settings, use the program's context-sensitive help. Click the **Help** button in a dialog box, or press the **<F1>** key after selecting (highlighting) any field.
- 7 Click **OK** to close the device property sheet.  
This saves your template in the program and returns you to the Station Administration window.

Now you can use this template to add one or more telephones to your PBX system. See [“Add a telephone \(using a template\)” on page 35](#) for instructions.

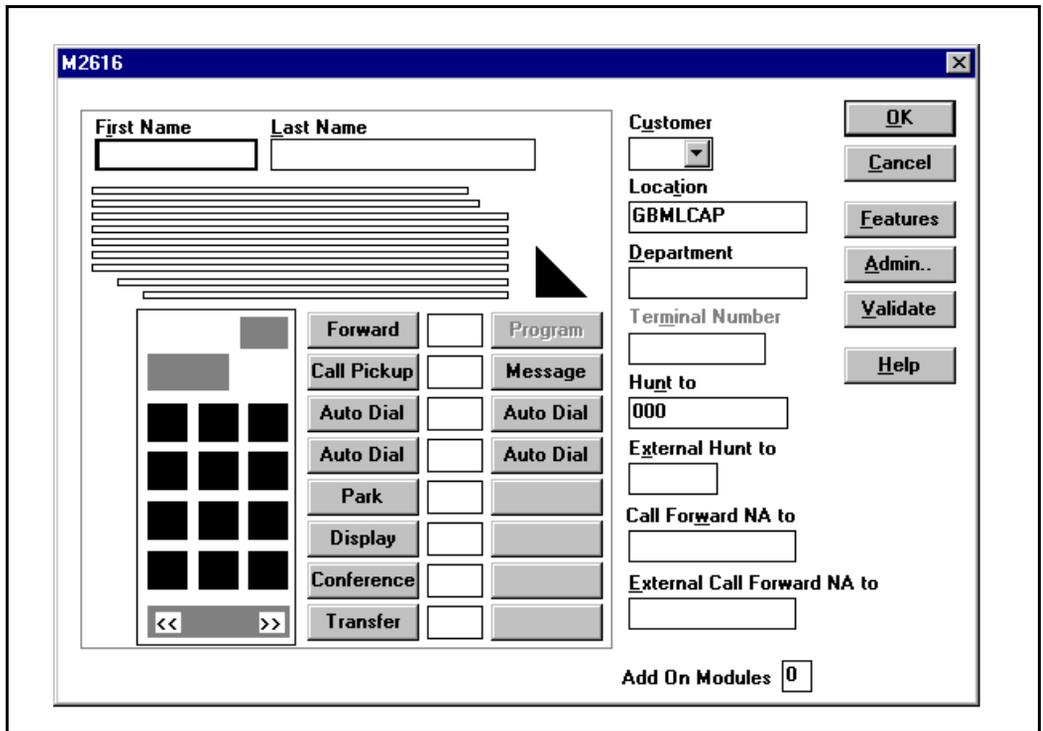
## Default templates

MAT for Compact comes with pre-defined default templates which may be modified as needed. The templates include:

- GBMLCAP - General Business Multi-Line Central Attendant Position template
- HospMLCAP - Hospitality Multi-Line Central Attendant Position template
- 2500GuestSet - 2500 Guest Set template

GBMLCAP - General Business Multi-Line Central Attendant Position template - is an M2616 Multi-Line Attendant Set template customized to support general business. The GBMLCAP default template displaying the supported features is shown in Figure 14.

Figure 14  
GBMLCAP template



HospMLCAP - Hospitality Multi-Line Central Attendant Position template - is an M2616 Multi-Line Attendant Set template customized to support the hospitality industry. The HospMLCAP default template displaying the supported features is shown in Figure 15.

Figure 15  
HospMLCAP template

The screenshot shows a configuration window titled "M2616" with the following fields and controls:

- First Name**:
- Last Name**:
- Customer**:
- Location**:
- Department**:
- Terminal Number**:
- Hunt to**:
- External Hunt to**:
- Call Forward NA to**:
- External Call Forward NA to**:
- Add On Modules**:

A grid of feature buttons is located in the lower-left quadrant:

<input type="checkbox"/>	<b>Forward</b>	<input type="checkbox"/>	<b>Program</b>
<input type="checkbox"/>	<b>Call Pickup</b>	<input type="checkbox"/>	<b>Message</b>
<input type="checkbox"/>	<b>Wake Up</b>	<input type="checkbox"/>	<b>Auto Dial</b>
<input type="checkbox"/>	<b>Cont COS</b>	<input type="checkbox"/>	<b>Auto Dial</b>
<input type="checkbox"/>	<b>Room Key</b>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<b>Display</b>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<b>Conference</b>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<b>Transfer</b>	<input type="checkbox"/>	<input type="checkbox"/>

Navigation buttons on the right include: **OK**, **Cancel**, **Features**, **Admin..**, **Validate**, and **Help**.

2500GuestSet - 2500 Guest Set template - is an Analog 2500 Guest Set (single line Analog 2500 Set with Message Waiting) template. The 2500GuestSet default template supports Controlled Class of Service, Pretranslation lists, Message Waiting Allowed, Lamp Allowed, Forward Allowed and Hunt Allowed. The 2500GuestSet template is shown in Figure 16.

**Figure 16**  
**2500GuestSet template**

The screenshot shows a configuration window titled "2500" with the following elements:

- First Name** and **Last Name** text input fields.
- Single Line Features** list box containing:
  - FDN FwdNoAnsDN (selected)
  - EFD XFwdNoAnsDN
  - EHT XHuntDN
  - OSP Battery Rev
  - ISP Hook Flash
- Set** and **Clear** buttons below the features list.
- Forward No-Answer DN** text input field.
- A 3x3 grid of buttons at the bottom.
- Customer** dropdown menu.
- Location** text input field containing "2500GuestSet".
- Department** text input field.
- Terminal Number** text input field.
- Directory Number** text input field.
- Hunt to** text input field.
- Vertical column of buttons on the right: **OK**, **Cancel**, **Features**, **Admin..**, **Validate**, and **Help**.

## More to learn

To modify a template, select **Template** from the **View** menu, select (highlight) the desired template entry, then select **Update** from the **Edit** menu. Treat the template as if it were the property sheet for a single station. When you finish your changes and click **OK**, this saves the modified template. This template will affect only new stations that you add using the template. To update stations already defined with an old template, see [“More to learn” on page 38](#).

You may want to define additional templates if you have more than one type of telephone in wide use at your facility. This will help reduce your administrative effort over time. Not only will templates speed the task of adding new stations, but the process of defining templates helps you to more quickly fine-tune the feature sets that work best for your PBX system.

## Add a telephone (using a template)

The purpose of this task is to add a telephone (station) to your PBX system.

To add a new station in MAT for Compact, whether using a template or not, you enter station data in a property sheet for the appropriate type of device. This data defines the configuration and feature set of the device, in this case, a telephone. The program stores this data in its database on the PC. Then you schedule transmission of this data to the phone switch to complete the task.

### Procedure

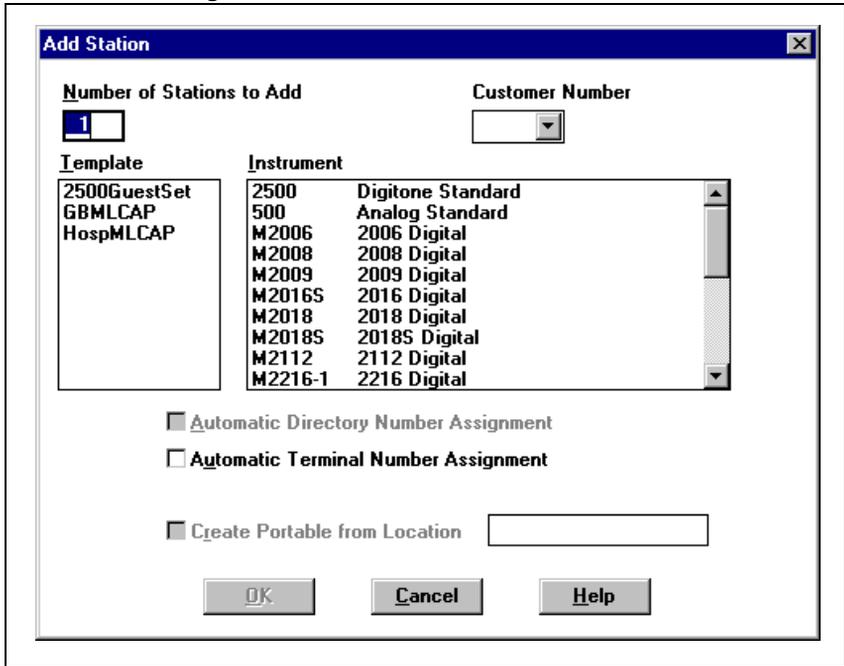
*Note:* This procedure's prerequisite is [“Define a template” on page 29](#).

Begin in the Station Administration window of your system.

- 1 Select **Station** from the **View** menu.
- 2 Select **Add** from the **Edit** menu.

This opens the Add Station dialog box.

**Figure 17**  
**Add Station dialog box**



- 3 In the Add Station dialog box, select your template in the Template field, enter 1 in the Number of Stations to Add field, and click **OK**.

This opens an instance of the device property sheet that reads in all of the information that you defined in your template.

**Figure 18**  
**M2008 property sheet (adding a station)**

- 4 In the device property sheet, enter the particular station user's name and department, plus the location, terminal number, and extension (directory number) of the station. Also assign any unique station features that this user requires.
  - The Location field requires a unique identifier. Use a descriptive name for your convenience.
  - Refer to your site's cable records for the appropriate terminal number, and then double-click the Terminal Number field to select that number from the list of available TNs.
  - Click Key 0 and select a key feature such as **SCR Single Call Ringing** to display a Directory Number field. Double-click this field to select and assign an available extension (DN) from the list.
- 5 Click **OK** to close the device property sheet.

When prompted by the program, schedule data transmission to the switch.

This completes the basic task, unless you need to connect actual phone hardware at the specified location.

## More to learn

To add a station *without* using a template, first you open the Add Station dialog box (using [steps 1](#) and [2](#) of the above procedure). Then, instead of selecting a template from the Template field (as you did in [step 3](#)), select a device from the Instrument field. This opens the default (undefined) property sheet for that device.

You can conveniently add more than one station at a time to the program. First open the Add Station dialog box. Then, instead of entering **1** in the Number of Stations to Add field (as you did in [step 3](#) of the above procedure), enter a greater number. In this same dialog, you specify either a template or an instrument; a template makes this task much easier. When you click **OK**, the Multiple Add Stations dialog box is displayed. This dialog provides a single list view for defining some of the unique aspects of each station, for example, the user's name, station location, and so on.

To modify station data, select its entry in the Station Administration window and choose **Update** from the **Edit** menu. This opens the device property sheet for that particular station, where you can change previously defined data.

To update multiple stations at one time, you can use the Global Update function. For example, you may want to modify station data that you defined with an old template, or data that was initially defined for your stations. The Global Update function lets you change common data values for any number of entries that you select in the Station Administration or CPND Administration window. Refer to the *Station Administration User Guide* for guidance.

You can delete a station by selecting its entry in the Station Administration window and choosing **Delete** from the **Edit** menu. Similarly, you can delete that station's CPND data by selecting the corresponding entry in the CPND Administration window and choosing **Delete** from its **Edit** menu.

## Move a telephone

The purpose of this task is to allow a user to keep the same extension (or directory number) while relocating to a different work area.

You do this by assigning a different terminal number for the user, one that corresponds to his or her new location. This keeps the remainder of the user's station data with the user.

### Procedure

Begin in the Station Administration window of your system.

- 1 If the new terminal number has been previously assigned, first delete its associated station data. See ["More to learn" on page 41](#).
- 2 Double-click the user's current station entry.  
This opens the property sheet for that entry, for example, M2008.

**Figure 19**  
**M2008 property sheet (moving a station)**

The screenshot shows a dialog box titled "M2008" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Personal Information:** "First Name" (Jane) and "Last Name" (Doe) fields.
- Address:** A series of empty text boxes for an address, with a mouse cursor pointing to the second box.
- Navigation:** A numeric keypad with buttons for "Program", "Key 6", "Key 5", "Key 4", "Key 3", "Key 2", "Key 1", and "Key 0", along with left and right arrow buttons.
- Configuration Fields:** "Customer" (0), "Location" (Ofc\_11), "Department" (Accounting), "Terminal Number" (001 0 00 14), "Hunt to", "External Hunt to", "Call Forward NA to", and "External Call Forward NA to".
- Action Buttons:** A vertical column of buttons on the right: "OK", "Cancel", "Features", "Admin..", "Validate", and "Help".

- 3 Enter the new terminal number and location.  
For example, Jane Doe moves from Office 10 to Office 11. The terminal number for Office 11 is **001 0 00 14**, as shown in Figure 19.  
**Note:** You can type the terminal number if you know it, or simply double-click the Terminal Number field to display the list of available TNs.
- 4 Click **OK** to close the device property sheet.  
When prompted by the program, schedule data transmission to the switch.

## More to learn

If a terminal number you want to use has been previously assigned, the safest approach is to first delete its associated station data. To do this, select (highlight) that station entry in the Station Administration window and select **Delete** from the **Edit** menu. When you confirm the deletion, the station data is removed from MAT for Compact's database. The station entry's Sync Status changes to **OUT**.

When you transmit notification of this deleted station to the phone switch, the **OUT** entry is removed from the program, and the switch deletes its version of that station data. Be sure to transmit the **OUT** status to the switch before reassigning the terminal number.

## Add a voice mailbox

The purpose of this task is to set up voice mail for those who need it. The retrieval of initial station data from the switch will have already downloaded any voice mailbox assignments made by the distributor technician.

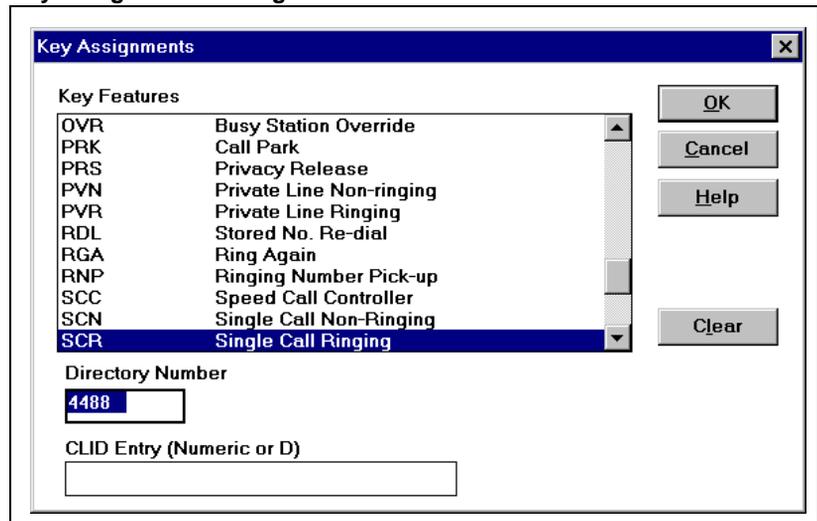
A voice mailbox (VMB) is associated with the prime directory number (DN) assigned to a station.

### Procedure

Begin in the Station Administration window of your system.

- 1 Double-click the station entry that you wish to modify.  
This opens the property sheet for that entry, for example, M2008.
- 2 In the property sheet, click Key 0 (showing the prime DN).  
This opens the Key Assignments dialog box.

**Figure 20**  
**Key Assignments dialog box**



- 3 Select a key feature that opens the Directory Number field, for example, **SCR Single Call Ringing**.

- 4 Double-click the Directory Number field, here showing **4488**, to open the Directory Numbers dialog box.
- 5 In the Directory Numbers dialog box, keep the current directory number (highlighted) and click **VMB**.

This opens the Voice Mailbox dialog box for that prime DN.

**Figure 21**  
**Voice Mailbox dialog box**

The screenshot shows a dialog box titled "Voice Mailbox - DN: 4488". It contains the following fields and controls:

- Sync Status:** NEW
- Customer Number:** 0 (with a dropdown arrow)
- Class of Service:** 2
- Second DN:** (empty text box)
- Third DN:** (empty text box)
- Keep Messages:** Yes (with a dropdown arrow)
- Buttons:** OK, Cancel, Delete, and Help (all on the right side)

- 6 Select **Yes** or **No** in the Keep Messages field. In the Class of Service field, enter the number that is defined in Meridian Mail.
- 7 Click **OK**.  
This creates a voice mailbox for the prime DN and closes the Voice Mailbox dialog box.
- 8 Click **OK** in each dialog box and property sheet that remains open.  
When prompted by the program, schedule data transmission to the switch.

## More to learn

To delete a voice mailbox, enter the Voice Mailbox dialog box for the associated DN and click **Delete**. Alternatively, to easily delete a station *and* the mailboxes associated with its directory numbers, select the station entry in the Station Administration window and choose **Delete** from the **Edit** menu. The confirmation prompt has a Delete VMB checkbox that defaults to **YES**.

Voice mailbox data is transmitted and retrieved with station data. Data synchronization works differently depending on the task at hand. Refer to the *Station Administration User Guide* for examples of VMB data synchronization when you add a mailbox, change a DN, or delete a station.

## Change the prime Directory Number

The purpose of this task is to assign a new prime DN to any station that needs it. You might decide to change your Numbering Plan, for example.

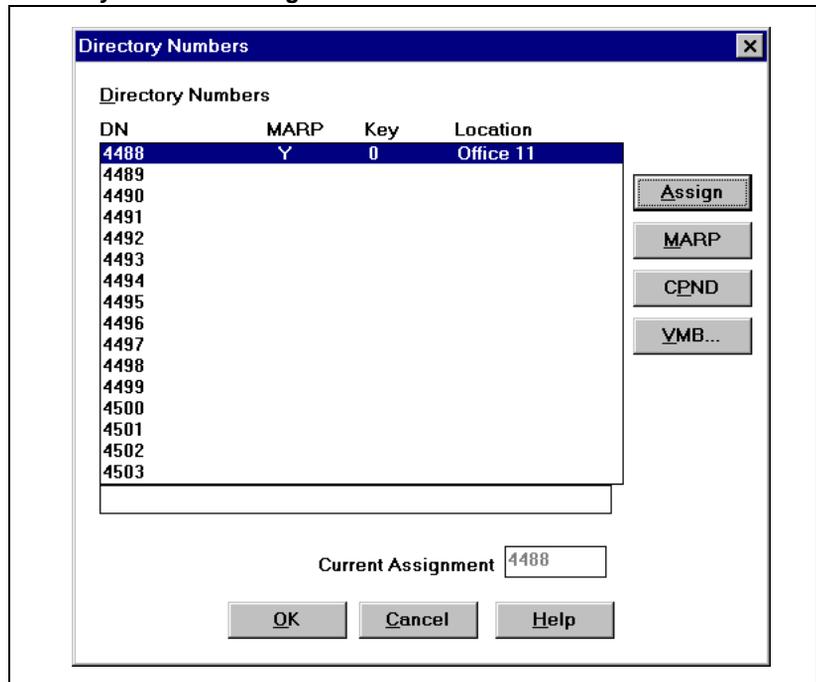
In MAT for Compact, the *prime* DN is associated with Key 0 of the telephone. On the phone hardware, Key 0 is often labeled with this same number.

### Procedure

Begin in the Station Administration window of your system.

- 1 Double-click the station entry that you wish to modify.  
This opens the property sheet for that entry, for example, M2008.
- 2 In the property sheet, click Key 0 (showing the prime DN).  
This opens the Key Assignments dialog box.
- 3 Double-click the Directory Number field to open the Directory Numbers dialog box.

**Figure 22**  
**Directory Numbers dialog box**



- 4 Select a new (unassigned) DN and click **Assign**.  
This moves the MARP, Key, and Location data to the new DN.
- 5 Click **OK** to return to the Key Assignments dialog box.  
Here you see the new DN in the Directory Number field.
- 6 Click **OK** in each dialog box and property sheet that remains open.  
When prompted by the program, schedule data transmission to the switch.

## More to learn

The DNs that are listed in the Directory Numbers dialog box are the numbers from your Numbering Plan. Your best assurance of easily assigning an available DN is by viewing this list. Alternatively, you can type a DN in the Directory Number field of the Key Assignments dialog box.

Typically, the program does not accept a DN that falls outside the range of your current Numbering Plan. However, in the Station Administration window, you can select **Mode** from the **Options** menu and disable Numbering Plan validation.

The DNs assigned to a station include the prime DN and that of an associated voice mailbox. Other DNs are *referred to* by a station, for example, a DN for Call Forward. In the Directory Numbers dialog box, you can select **CPND**, **MARP**, or **VMB** to link other DNs to a station's assigned name.

## Change the Call Party Name Display

The purpose of this task is to keep incoming call information accurate for those who receive calls.

Call Party Name Display (CPND) displays the name of an incoming caller to the user at the called station. CPND data is associated with a DN, and not with a particular station. When someone changes their name, or when you assign a previously used DN to a new person, also change the CPND data to match.

### Procedure

Begin in the CPND Administration window of your system.

- 1 Double-click the CPND entry that you wish to modify.  
This opens CPND's property sheet for that entry.

**Figure 23**  
**CPND property sheet**

The screenshot shows a dialog box titled "Call Party Name Display Name" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Customer:** A dropdown menu showing "0".
- Entry Type:** A group box containing three radio buttons: "Directory Number" (selected), "Dial Intercom Group", and "DNIS IDC".
- Directory Number:** A text input field containing "4488".
- Name:** A group box containing:
  - First Name:** A text input field containing "Jane".
  - Last Name:** A text input field containing "Fleming".
  - or get name from Location:** An empty text input field.
- Display Format:** A dropdown menu showing "First, Last".
- Expected Name Length:** A text input field containing "27".

On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

- 2 Change the name and click **OK**.  
This returns you to the CPND Administration window where you see the changed name in the highlighted CPND entry.
- 3 Transmit the new data to your switch.
- 4 Close CPND Administration and launch Station Administration.
- 5 In the Station Administration window, double-click the station entry that has the same name you changed in CPND.  
This opens the property sheet for that entry, for example, M2008.
- 6 Change the station user's name and click **OK**.  
Both CPND and Station Administration now know Jane Doe, for example, as Jane Fleming.

## More to learn

CPND data and Station configuration data are treated as separate files within MAT for Compact's database. The switch treats this data separately as well. A user's name in Station Administration does not need to match the name entered in CPND. Only the CPND name and its associated DN get stored in the switch's database. However, when using Station Administration for reporting purposes, you may want to view accurate station name data.

You can directly access and maintain CPND data from the Directory Numbers dialog box ([Figure 22](#)). The **CPND** button is particularly helpful for linking several DNs to a station's assigned name.

## Generate basic reports

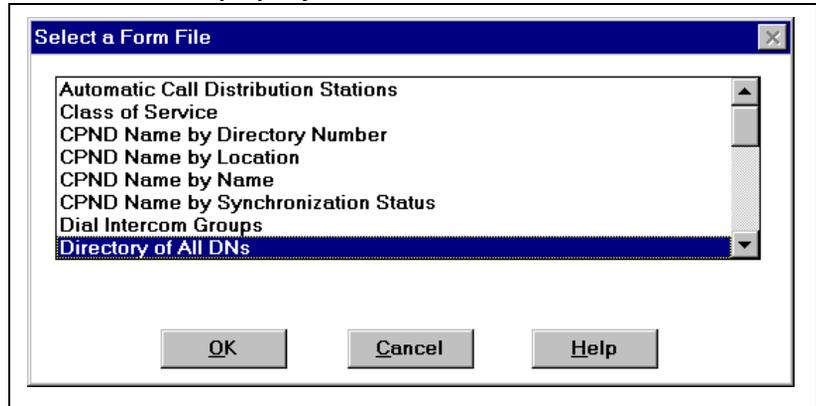
The purpose of this task is to help you view and easily record specific data.

### Procedure

Begin in the Station Administration window of your system.

- 1 Select **Reports - Report Generator** from the **File** menu.  
This opens the Report Generation window.
- 2 Select **Run Report...** from the **Reports** menu.  
This opens the Select a Form File property sheet.

**Figure 24**  
**Select a Form File property sheet**



- 3 Select a Form file of the information that you want to include in a report and click **OK**.
- 4 Specify an output device for viewing the report—your screen, the default printer, or an Export file—and click **OK**.  
This generates your report.

## More to learn

You can just as easily generate reports from the CPND Administration window by selecting **Reports** from the **File** menu.

The Reports Generator includes a form editor for editing existing forms or creating custom forms.

The standard Form files include the following report types in addition to those you can view in [Figure 24](#):

- Equipment Inventory
- Hunt Patterns
- Key Assignments
- List of Power Failure Phones
- Message Centers
- Private Line
- Ringing Number Pickup Group
- Speed Call Groups
- System Speed Call Groups
- Telephone Directory (Phone Book)
- Telephone Directory by Department
- Telephone Directory by Directory Number
- Telephone Directory by Location
- Telephone Directory by Name
- Telephone Directory by Terminal Number
- Used DN List



# Where To Go Next

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For more details about the features of MAT for Compact, see the guides entitled *Meridian Administration Tools MAT 6 User Guides*. Refer to the *Meridian Administration Tools Station Administration User Guide* and *Meridian Administration Tools Common Services User Guide*. The features described in these guides are in MAT for Compact.

Look at the other user guides in the MAT 6 User Guides volumes for software capabilities that you might want. Each guide describes a software application you can add to your system. For ordering information and brief descriptions of each application, refer to “Appendix A: Add-On Applications” on [page 55](#).

MAT for Compact gives you powerful tools for managing the day-to-day needs of your PBX system. Learn more about these tools, and enjoy your new PBX system!



# Appendix A: Add-On Applications

MAT for Compact includes Nortel's Station Administration application and Common Services. Contact your distributor if you wish to add other MAT applications to your system.

Your distributor can help you license and activate any applications that you request. These are the add-on applications and a brief description of each:

**Table 3**  
**Available add-on applications**

Application	Description
Alarm and Event Management	Improves handling of system-generated alarms and events for quick viewing and response
Call Accounting <sup>1</sup>	Collects call records for assessing call charges and the effectiveness of your telephone services
Call Tracking	Monitors and displays trends and unusual calls to help you adjust equipment and maximize resources
ESN Analysis and Reporting Tool	Helps you to configure, analyze, and manage large Electronic Switched Network (ESN) databases
Maintenance Windows	Provides comprehensive views of your hardware configuration for quickly identifying software settings you need to change
Traffic Analysis	Collects and maintains records of phone traffic data for analyzing trunk usage, peak periods, process loads, and junctor and loop traffic
<sup>1</sup> Also available is a Call Accounting Mini-Expansion License. This license allows you to increase the number of phone-system terminals from 100, the maximum number in the standard Call Accounting application, to 128 maximum.	



# Appendix B: Switch Configuration

This instruction is for the distributor technician. Please record the cards you install and their installed locations in [Table 6 on page 58](#). The customer may need to designate a line card in MAT for Compact if you have not done so already. This task is a prerequisite to adding a telephone to the PBX system.

Also, record the user ID and password for the switch in [Table 7 on page 59](#). The customer will need this information when adding or changing a system in the program.

## Available cards

The only valid peripheral equipment cards that can be configured in MAT for Compact are the following:

**Table 4**  
**Available peripheral equipment cards**

Card	Description
NTMW05AA <sup>1</sup>	24-Port Digital Line Card
NTMW06AA	16-Port Analog Line Card
NTMW07AA	4-Port Analog Trunk / 4-Port Line Card
<sup>1</sup> This card provides 24 digital voice lines and eight additional data ports. The eight data units (24 - 31) are associated with eight voice units (8 - 15).	

## Possible slots

These are the possible slots (*loops* in the software) for each installed card:

**Table 5**  
**Possible card locations**

Card	Card Density (CDEN)	Possible slots
NTMW05AA	8D	1-30
NTMW06AA	4D	1-30
NTMW07AA <sup>1</sup>	SD	2, 4, 6, 12, 14, 16, 22, 24 or 26
<sup>1</sup> The slot numbers for this card are associated with the four analog lines, not the four trunks.		

## Installed configuration

The following information must be provided for the customer:

**Table 6**  
**Customer's installed cards and their locations**

Available card type	Installed? (Yes / No)	Installed in slot... (Circle the correct location)
NTMW05AA		1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29 or 30
NTMW06AA		1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29 or 30
NTMW07AA		2, 4, 6, 12, 14, 16, 22, 24 or 26

## System ID and password

The following information must be provided for the customer:

**Table 7**  
**User ID and Password for system (or switch)**

System User ID	System Password



Meridian 1  
**Option 11C Compact**  
**MAT 6**  
Introduction Guide

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