

BPS Guide

FortiEndpoint 25.2



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FortiEndpoint 25.2 BPS Guide

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Introduction

FortiEndpoint Best Practices Service is an account-based annual subscription providing access to a specialized team that delivers remote guidance on deployment, upgrades, and operations. The service allows customers to share information about their deployment, user requirements, resources, and other related items. Based on the information provided, the BPS experts can provide recommended best practices, sample code, links to tools, and other materials or assistance to speed up adoption and guide the customer towards best practice deployments. The team does not log into customer devices to make changes for them. This is a consulting and guidance service which may include sample configurations or playbooks. This is not an on-site professional services offer.

Note that for integration with other Fortinet products, configuration guidance is only provided for FortiClient EMS, FortiClient, and FortiEDR.

Below are some examples of what the Best Practice Service can help with:

- Product Overview:
 - FortiClient EMS and FortiClient
 - FortiEDR
- Initial setup:
 - AD/Entra integration
 - Agent preparation
- RBAC and LDAP/AD integration:
 - Grouping endpoints
 - Assigning profiles
- Fortinet Security Fabric integration:
 - EMS connector
 - Endpoint tags
 - FortiAnalyzer logging
 - XDR
- Endpoint policy:
 - Assigning profiles to users or devices
 - Provisioning profiles
 - Advice on grouping like endpoints
 - Security, communication control, and Threat Hunting profile
- Endpoint profile:
 - Configuring security features to accomplish security needs
 - Effects and caution when enabling specific features
- Client deployment:
 - Supported OSES (Windows, Mac, Servers (Windows + Linux))
 - Deploying from EMS
- Remote access (EMS side):

- VPN configuration
- Auto-connect
- Always up
- VPN before logon
- ZTNA onboarding
- Events tuning and analysis



The FortiEndpoint BPS team provides best practice services only for FortiClient EMS, FortiClient, and FortiEDR. For other Fortinet products (FortiGate, FortiAnalyzer, etc.), please contact sales to inquire about available services like Professional Services or Jump Start.

Process overview

1. Register BPS and product contract in the Forticloud portal (<https://support.fortinet.com>).
2. Initiate BPS onboarding request (https://mfcts.mss.fortinet.com/mfcts/cli_out/#/welcome).

Assigned BPS engineer will schedule onboarding kickoff meeting, followed by consecutive configuration guidance meetings.

3. Deployment of agent and events tuning assistance .
4. Switch to prevention mode.
5. Project closure.



Best Practices Service is an annual account-based subscription. Customers can open service requests for "how-to" or "what is" questions during the subscription period. Onboarding a device is only done once. For future overviews, refer to meeting recordings or NSE training materials.

How and when to initiate a BPS onboarding request

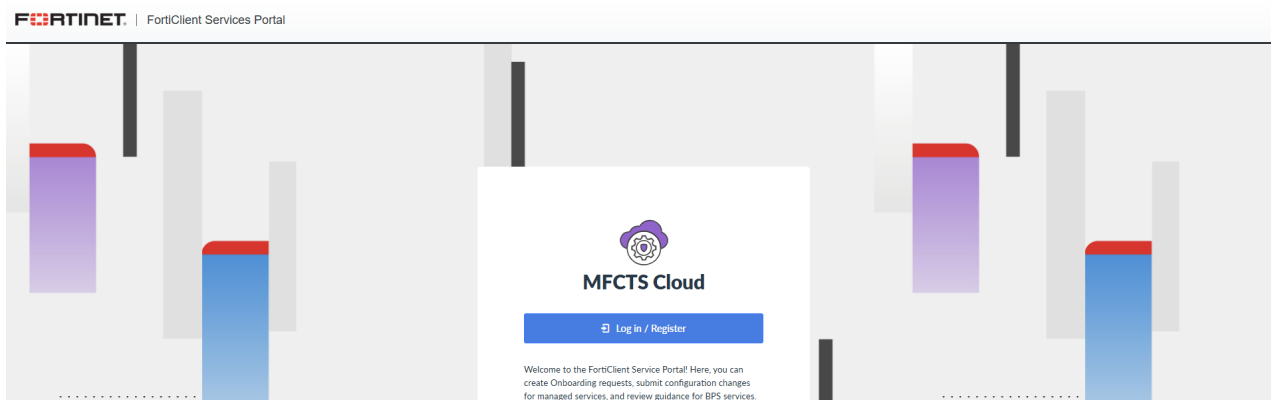
You can initiate a BPS onboarding request by following these simple steps.



Register your BPS and FortiEndpoint contracts to FortiCloud before initiating the onboarding request.

To initiate BPS onboarding request:

1. Log in to the [FortiClient Services Portal](#).

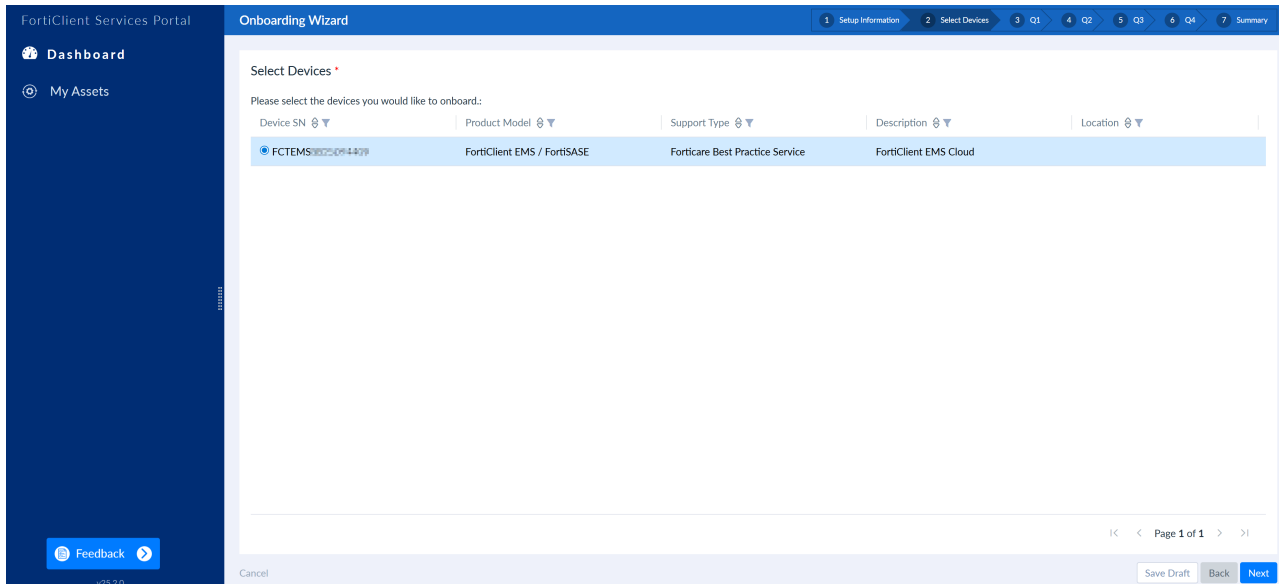


2. Go to *My Assets*. Confirm that it lists your serial number and respective service entitlement. For FortiEndpoint, *My Assets* lists an EMS serial number. For BPS, the *BPS Entitlement Status* column shows *Entitled*. For Managed Service, the *Managed Service Entitlement Status* column shows *Entitled*. If this is not the case, confirm that you have registered your FortiEndpoint and BPS or Managed Service contracts.

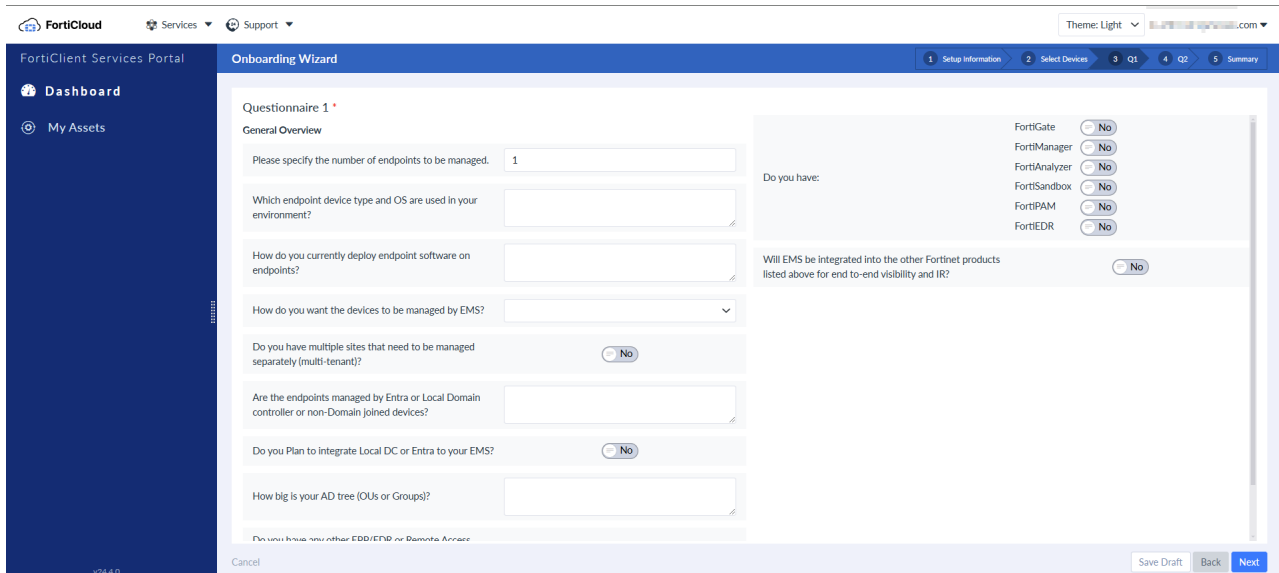
| Device SN | BPS Entitlement Status | Managed Service Entitlement Status | FSR Onboard Status | Platform | Description | EMS Cloud Expiration | EMS OnPrem Ex |
|------------------|------------------------|------------------------------------|--------------------|-----------------------------|----------------------------|----------------------|-----------------|
| FCTEM58824093030 | Entitled | Entitled | Not-Onboarded | FortiClient EMS / FortiSASE | FortiClient EMS Cloud | August 27, 2025 | Not-Entitled |
| FCTEM58824093030 | Entitled | Not-Entitled | Not-Onboarded | FortiClient EMS / FortiSASE | FortiClient EMS On Premise | Not-Entitled | August 27, 2025 |

3. Go to *Dashboard*.
4. Click *Start Onboarding*.
5. From the *Timezone* dropdown list, select your timezone. Click *Next*.

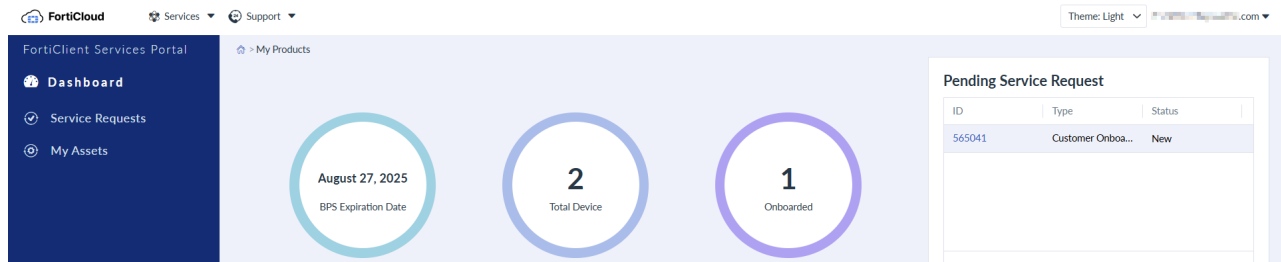
6. Select the desired FortiEndpoint instance. This displays as an EMS serial number. Click *Next*.



7. The following page displays a questionnaire regarding your desired EMS configuration. Answer the questions, then click *Next*.



8. The following page displays a questionnaire regarding which features to enable on your EMS instance. Answer the questions, then click *Next*.
9. The following page displays a summary of the information that you have provided. Review the summary, and, once satisfied, click *Submit*. In the *Pending Service Request* widget on the *Dashboard*, you can view that you have a pending customer onboarding request.



When to engage BPS?

Customers are encouraged to engage BPS services in the following scenarios:

| Scenario | Description |
|---|---|
| During initial FortiEndpoint installation | Seek assistance from BPS experts during the initial setup and configuration of FortiEndpoint |
| Initial planning for FortiEndpoint | Engage BPS early in the planning phase for deploying FortiEndpoint to leverage expert guidance and best practices. |
| Post-deployment configuration review | Use BPS for reviewing and optimizing FortiEndpoint configurations post-deployment to ensure optimal performance and security. |
| How-to questions | Reach out to BPS for clarifications, guidance, or assistance with any specific questions or challenges encountered during usage of FortiEndpoint. |

Change log

| Date | Change description |
|------------|---------------------------|
| 2025-08-07 | Initial document release. |



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