



FortiVoice - User Portal Guide

Version 5.3.26

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September 30, 2020

FortiVoice 5.3.26 User Portal Guide

26-5326-607456-20200930

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Change log

Date	Change description
2020-09-30	Initial release of the FortiVoice Phone System 5.3.26 User Guide.

Introduction

The FortiVoice user portal allows you to perform the following tasks:

- Check your voicemail including playing, deleting, or saving the voicemails.
- Receive and send fax.
- Check your recorded calls including playing, deleting, or saving the voicemails.
- Check your call record for received, placed, or missed calls.
- View your corporate phone directory.
- Manage calls.
- Customize sound files.
- Check the feature codes that you can dial on your phone keypad.
- Configure phone profiles.
- Set up phone call reminders.
- Configure your extension according to your preferences.
- Use the operator console to process calls for your organization.
- Use the call center console to process call queues.



Available functions may vary depending on the privileges assigned to your phone extension by your FortiVoice system administrator.

Logging in to the FortiVoice user portal

Perform this procedure to log in to the FortiVoice user portal using a web browser.

Prerequisites

- Ask your FortiVoice system administrator for the IP address of the FortiVoice phone system that is managing your extension.
- Know your phone extension on the FortiVoice phone system and user password for web access.
- Use one of the recommended web browsers. For details, see the [FortiVoice Phone System Release Notes](#).

Procedure steps

1. Open a web browser and go to `https://<IP_address_or_FQDN>/voice`.
Where <IP_address_or_FQDN> is the IP address or the FQDN of the FortiVoice phone system.
If the FortiVoice system administrator has changed the access port, then you must also include the port, for example: `https://<IP_address_or_FQDN>:446/voice`.
2. In **Extension**, enter your extension.
3. In **Password**, enter the user password for your extension.
4. Click **Login**.
The main page of the FortiVoice user portal appears.
The menu selection may vary depending on the privileges that the FortiVoice system administrator has assigned to your extension.

Using the FortiVoice user portal

Details about using the FortiVoice user portal are included in the following topics:

- [Managing voicemail on page 7](#)
- [Working with fax on page 7](#)
- [Managing recorded calls on page 8](#)
- [Checking call records on page 8](#)
- [Viewing the corporate directory on page 9](#)
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- [Customizing sound files on page 10](#)
- [Viewing feature access codes on page 10](#)
- [Configuring phone profiles on page 14](#)
- [Setting a reminder on page 15](#)
- [Choosing extension preferences on page 15](#)
- [Using the operator console on page 20](#)
- [Using the call center console on page 24](#)

Managing voicemail

The *Voicemail > Inbox / Urgent / Old* menu displays all of your voicemails.

You can select a voicemail and click *Play* to listen to it, *Stop* to pause it, *Delete* to remove it, *Download* to save it, or *Forward* to send it to another extension.

Working with fax

You can send and receive faxes using the portal. If your administrator enables you to monitor a fax extension, you can also manage all of the faxes received on that fax extension.

To view and download a fax received on your extension, go to *Fax > Inbox*.

To view and download a fax sent from your extension, go to *Fax > Sent*.

To send a fax

1. Go to *Fax > Sent*.
2. Click *New*.

3. Configure the following:

GUI field	Description
Send fax	
To	Enter the fax number to which you want to send the fax.
Attachment	Click <i>Browse</i> to locate the fax you want to send. Supported file formats are PDF and JPEG only.
Advanced	
FAX header	Enter the fax header such as the receiver's name, subject, or number of pages.
Station ID	Enter the phone number or extension associated with the fax machine.

4. Click **Send**.**To monitor a fax extension**

1. If the FortiVoice system administrator has enabled you to monitor incoming faxes on a fax extension, go to *Fax > Monitor*.
2. Click the fax you want to monitor.
3. You can view, delete, resend, forward, and download a fax sent to this fax extension.

Managing recorded calls

The *Call Recording* menu displays all of your recorded calls.

You can select a call and then perform one of the following actions:

- To listen to the recorded call, click *Play*.
- To remove the recorded call, click *Delete*.
- To save the recorded call (WAV file format), click *Download*.
- To send the recorded call to another extension, click *Forward*.

You can record a call by entering the call recording feature code on the keypad while in call. For information on the feature codes, see [Viewing feature access codes on page 10](#).

Checking call records

The *Call Log/CDR* (Call Detail Record) menu displays all your phone call records, including the time of the call, the caller and receiver, the call duration, the call status, and the call direction.

You can filter the call records display by clicking *Search* and enter criteria that records must match in order to be visible. You can also save the call records by clicking *Download*.


To view missed calls, go to *Call Log/CDR > Missed*.

To view received calls, go to *Call Log/CDR > Received*.

To view placed calls, go to *Call Log/CDR > Placed*.

Viewing the corporate directory

The *Directory* menu displays all of the extensions in your organization, including the extension number, display name on the phone, location of the extension, extension department, and the extension type.

You can call an extension by clicking  .

Managing calls

Call Handling allows you to manage the call process. For example, you can configure the process to forward a call to another number on a specific schedule.

To manage a call

1. Go to *Call Handling*.
2. Select a call status at the top of the page.
Each status can only be used for one call management configuration.
If you select *Black List*, the call management configuration will apply to the numbers added in the *Black List* configuration. See [Black List on page 18](#).
3. For *Call Process*, select *System default action* or *User defined action*.
The *System default action* changes depending on the status selection.
4. If you select *User defined*, click *New* to define a call process according to a schedule.
 - Select a default *Schedule* for the call action. You can click *View* to display the schedule details.
 - Select an *Action* for the call process. You can select multiple actions to process a call in sequence. For example, you can select *Play announcement* and then *Auto attendant*. In this case, an incoming call will be transferred to the auto attendant after an announcement is played.
Default action is equal to the action when you select System default action under Call Process.
 - If you select *Follow me*, select a follow me profile. For information on configuring follow me, see [Follow Me on page 18](#). This option is available only if your administrator enables call forwarding in your extension's user privilege.
 - If you select *Play announcement*, select a sound file. For information on configuring sound files, see [Customizing sound files](#).
 - If you select *Auto attendant*, select a default auto attendant.
 - If you select *Forward*, enter the number to which you want to forward the call.
This option is available only if your administrator enables call forwarding in your extension's user privilege.
 - Click *Create*.
5. Click *OK*.

Customizing sound files

You can make sound files to be used in call management when you select the *Play announcement* action in a call process configuration.

To customize a sound file

1. Go to *Custom Sounds > Custom Sounds*.
2. Click *New*.
3. Enter a name for the sound file.
4. You can perform the following actions:
 - To ring your extension and record an announcement using the phone, click *Call me*.
 - To import an announcement, click *Upload*.
 - To save an announcement, click *Download*.

Viewing feature access codes

By default, the FortiVoice unit has defined the following codes for you to access certain features by dialing the codes on your phone keypad. Your administrator may have redefined the codes.

To access the vertical service codes

1. Go to *Feature Code > Vertical Service Code*.
2. View the codes and their descriptions. The default codes include:

Code	Description
**	Direct Inward System Access (DISA) service allows external users to dial into PBX and use PBX service just like the local extensions. To use DISA, dial the PBX main number and then **. The PBX will prompt you to enter the account code assigned by your administrator. Once you pass authorization, you can use PBX service just like a local extension.
*10	Hot-desking refers to the sharing of one phone by multiple users at different time periods. Dial *10 to check hot desk login status including login expiry time.
*11	Hot-desking refers to the sharing of one phone by multiple users at different time periods. Each user can log into the phone by pressing *11 and enter his extension number and voicemail PIN following the prompts.
*12	To log out hot desking, press *12 and enter your extension number and voicemail PIN.
*15	This code is used to remove the extension number of a FortiFone by the administrator. Dial *15 on any FortiFone that connects to the FortiVoice unit and enter the administrator PIN.

Code	Description
*16	This code is used to remove the extension number of a FortiFone. Dial *16 on your FortiFone that connects to the FortiVoice unit and enter the voicemail PIN.
*17	This code is used to set an extension number for a FortiFone by the administrator. Dial *17 on any FortiFone that connects to the FortiVoice unit and enter the administrator PIN. You can then enter an existing extension to set it as the extension of this phone.
*18	This code is used to set an extension number for a FortiFone by a phone user. Dial *18 on any FortiFone that connects to the FortiVoice unit and enter the voicemail PIN provided by the administrator. You can then enter an existing extension to set it as the extension of this phone.
*411	Dial *411 to access the phone directory where you can look for an extension by entering a person's name.
*50	Dial *50 to monitor a call by listening to it. You also need to enter your voicemail PIN.
*61	Dial *61 to log into the queues of which your extension is a member.
*62	Dial *62 to log out of the queues of which your extension is a member.
*63	Dial *63 and enter your voicemail password and the queue extension to log into this queue. The voicemail password is required only if this option is selected for your extension by the administrator.
*64	Dial *64 and enter your voicemail password and the queue extension to log out of this queue. The voicemail password is required only if this option is selected for your extension by the administrator.
*65	Dial *65 and enter your voicemail password to login all members of a queue of which your extension is a member. The voicemail password is required only if this option is selected for your extension by the administrator.
*66	Dial *66 and enter your voicemail password to logout all members of a queue of which your extension is a member. The voicemail password is required only if this option is selected for your extension by the administrator.
*67	Dial *67 and enter your voicemail password and the reason code to pause all queues of which this extension is a member.
*68	Dial *68 and enter your voicemail password and the reason code to unpause all queues of which this extension is a member.

Code	Description
*71	Dial *71 followed by a code to set a the call forward: 1 to enable, 0 to disable, and 9 to change the forwarding number.
*72	Dial *72 followed by 1, 2, or 3 and enter your voicemail password to temporarily replace the original personal schedule with one of the three default ones. You may also modify the temporary schedule. Dial *720 to go back to the original schedule.
*73	The twinning feature allows you to use an external telephone (often a smartphone or home phone) to replicate your internal office extension (often your desk phone), so that when your desk phone rings, so does the “twin” phone. Dial *73 followed by 1 to enable twinning or 0 to disable twinning.
*74	This code allows you to make international or long distance calls from a floating host device which is a device (usually a phone) that allows other extensions to originate a call. Dial *74 to enter the floating mode and make an outgoing call on a floating host device. For more details, see Floating code formats on page 13 .
*75	Dial *75 and enter a code to show the room cleaning status. Depending on the selected PMS protocol, the room condition codes vary. For FortiVoice: <ul style="list-style-type: none"> • Maid present • Clean • Not clean • Out of service • To be inspected • Occupied/clean • Occupied/not clean • Vacant/clean • Vacant/not clean
*77	Dial *77 and enter a time for a wake-up call. The time format should be in the format of hhmm. For example, 15:30 is entered as 1530.
*78	Dial *78 to turn on the Do Not Disturb service. Callers will hear the busy sound when they dial your number.
*79	Dial *79 to turn off the Do Not Disturb service. Otherwise, callers will hear the busy sound when they dial your number.
*80	As a pickup group member, you can dial *80 on your phone to pick up a call from any ringing extension.
*81	As a pickup group member, you can dial *81 or the code you set on your phone followed by a ringing extension number to pick up a call from that extension.
*82	An administrator with the privilege can dial *82 followed by 1, 2, or 3 and the administrator PIN to temporarily replace the original system schedule with one of the three default ones. You may also modify the temporary schedule. Dial *820 to go back to the original schedule.

Code	Description
*92,INTERCOM	Dial *92 and an extension to intercom that extension.
*97,tsvm	Dial *97 from your own phone and then enter your voicemail password to directly access your voice mailbox.
*98	Dial *98 from any extension and then enter your extension number and voicemail password to access your voice mailbox.
0	Dial 0 to access the operator.
DNDTGL	To turn the Do not disturb (DND) feature on or off, press the DND key on FortiFone.
PAGEGROUP	To page an extension group, enter PAGEGROUP or the code you set then the page group number.
UNPARK	To unpark a call, press this key on FortiFone.

Floating code formats

Caller privilege	Code format
Allow	Extension number + * + user PIN or extension number + * + personal code
Allow with personal code	Extension number + * + user PIN
Allow with account code	Extension number + * + user privilege account code
Allow with account and personal codes	Extension number + * + user privilege account code or extension number + * + user PIN

To access the mid-call codes

1. Go to *Feature Code > Mid-Call/DTMF Code*.
2. View the codes and their descriptions. The default codes that you can use during a call include:

Code	Description
*11	Dial *11 and then the extension number that you want to transfer the call to. You are not interacting with the person receiving the call.
*12	Dial *12 and then the extension number that you want to transfer the call to. If the person answers the call, you have the chance to announce the caller before transferring the call.
*30	To start a personal call recording. You can access personal call recordings from the FortiVoice user portal. Before starting a recording, have the agreement of the person you are talking with or check your local laws about recording phone conversations.
*35	To start a system call recording.

Code	Description
	To access system call recordings using the web-based FortiVoice phone system, you need administrator permission. Before starting a recording, have the agreement of the person you are talking with or check your local laws about recording phone conversations.
*36	To pause the system recording.
*37	To resume the system recording.
*38	To cancel the system recording.
*40,PARK	To park a call.

Configuring phone profiles

This option is only available for FortiFone 260i and above.

Phone profiles contain the phone configurations that are mostly used and customized, such as the programmable phone keys. Phone profiles make extension configuration more flexible because phone users are allowed to choose the profile they want. In addition, any changes the administrator makes to a profile is automatically applied to the extensions that use the profile.

If your administrator has applied an administrator defined phone profile to your extension, you can only view your phone profile. If your administrator has applied a user defined phone profile to your extension or you choose *User defined* phone profile in [Choosing extension preferences on page 15](#), you can configure your phone profile.

To configure a phone profile

1. Go to *Phone Profile*.
2. Configure the following:

GUI field	Description
Automatic Configuration	
Display option	Select what to display on the extension: your name only or name and number.
Set Programmable Phone Key	<p>Allows you to program the phone keys for FortiFone-260i to 560i. For FortiFones with expansion modules, you can select the module to program the keys.</p> <p>After completing programming the keys, you can click <i>Download printable label</i> to save and print out the configuration and label it on the phone.</p> <p>Note that keys 1 and 2 are reserved and cannot be programmed.</p> <p>If you select <i>One key dial</i> or <i>User defined</i> function for a key, you need to enter the information in the <i>Resource</i> field based on your phone configuration. For example, if you select <i>User defined</i> for key 3 and you want to map this key to your voicemail code such as *78, enter *78 in the <i>Resource</i> field.</p>

3. Click *Apply*.

Setting a reminder

You can schedule daily events and send event reminders. One reminder record can contain multiple reminder events.

To schedule an event

1. Go to *Reminder* and click *New*.
2. Configure the following:

GUI field	Description
Title	Enter a name for the reminder event.
Location	Enter the location for the event.
Start time	Specify when the event starts.
Recurrence	Click <i>None</i> to configure recurrence settings.
Description	Enter any notes as required.
Guest	Click <i>Add</i> to select the internal and external phone numbers to which you want to send event reminder calls. If you want to delete a number, select the number and click <i>Remove</i> .
Reminder audio	Configure the reminder audio that are sent to the selected guest phones. <ul style="list-style-type: none"> • <i>Default</i>: The reminder audio will be a beep sound. • <i>Create New</i>: Click to customize the reminder audio. For <i>Action</i>, click <i>Call me</i> to record a message from an extension; Upload to look for an existing reminder audio; and <i>Download</i> to save the audio file. For <i>Extension</i>, if you select <i>Call me</i> for <i>Action</i>, select the extension on which you want to record a message. • Click <i>Create</i> and <i>Create</i> to exit.

Choosing extension preferences

The *Preferences* menu lets you customize your extension settings, including basic settings, sound files, user portal display, speed dial, voicemail PIN, phone transfer, phone number black list, and phone profile.

To set extension preferences

1. Go to *Preferences > Preferences*.
2. Configure the following:

GUI field	Description
Settings	
Number	Displays your extension number. This is view-only.
Display name	Displays the caller ID on the extension. This is usually the name of the extension user and is view-only.

GUI field	Description
Emergency caller ID	Enter the caller ID to display on the destination phone when you dial emergency number such as 911.
External caller ID	<p>If you want to display a particular caller ID on a called phone instead of the FortiVoice main number or the trunk phone number, enter it here. The format must be <code>name<phone number></code>, such as <code>jdoe<2221111234></code>.</p> <p>If you are not sure about this feature, contact your administrator for more information.</p>
Ring duration	Enter the phone ringing duration in seconds before an incoming call goes to voicemail.
Call forward	Select to forward phone calls and enter the phone number to forward the calls.
Call waiting	Select to enable call waiting.
Do not disturb	Select to enable DND.
Message waiting indication	Select to enable phone indication that a message is received.
Voicemail handling (Caller presses 0 during announcement)	Select to allow a caller to press 0 to talk to the operator during announcement.
Include caller id number when playing voicemail message	Select to announce caller's ID when playing the voicemail.
Include date and time when playing voicemail message	Select to announce date and time when playing the voicemail.
Notification Options	
Voicemail	<p>Select the type of email notification when this extension has a voicemail:</p> <ul style="list-style-type: none"> • <i>None</i>: Do not send any notification. • <i>Simple</i>: Send an email notification. • <i>With attachment</i>: Send an email notification with the voicemail attached.
Fax	<p>Select the type of email notification when this extension has a fax:</p> <ul style="list-style-type: none"> • <i>None</i>: Do not send any notification. • <i>Simple</i>: Send an email notification. • <i>With attachment</i>: Send an email notification with the voicemail attached.
Missed call	Select <i>On</i> if you want to send an email notification when an incoming call is missed.
Email address	Enter the email address(es) to which the email notifications for voicemails, faxes, or missed calls are sent.
Voicemail Options	<p>Configure greeting, unavailable, and busy messages.</p> <p><i>Name</i>: Your name for the voicemail. For example, John Doe.</p>

GUI field	Description
	<ul style="list-style-type: none"> • Standard: Use the system default name for the voicemail. This will be the extension number. • Personal: Use your own name for the voicemail. <ul style="list-style-type: none"> • Click <i>Call me</i> to ring your extension and record a name using the phone, such as your name or extension number. • Click <i>Upload</i> to import a name, such as your name or extension number. • Click <i>Play</i> to listen to a recorded name. • Click <i>Erase</i> to delete a recorded name. • Click <i>Download</i> to save a recorded name. <p>Greeting: Select the voicemail greeting mode and greeting content.</p> <ul style="list-style-type: none"> • Standard: The system defined greeting. • Simple: The customer-recorded greeting that applies to any time except when the line is busy or extension is unavailable. • Scheduled: The customer-recorded greeting that comes with a schedule. • Conditional: The customer-recorded greeting that only applies to occasions when the line is busy or extension is unavailable. • Audio file: Click to configure the greeting. This option is only available when you select <i>Simple</i>, <i>Scheduled</i> or <i>Conditional</i>. <ul style="list-style-type: none"> • Click <i>Call me</i> to ring your extension and record a message such as a greeting, unavailable, or busy message using the phone. This applies to the <i>Simple</i> and <i>Scheduled</i> modes. • Click <i>Upload</i> to import a message such as a greeting, unavailable, or busy message. • Click <i>Play</i> to listen to a message such as a greeting, unavailable, or busy message. • Click <i>Erase</i> to delete a message such as a greeting, unavailable, or busy message. • Click <i>Download</i> to save a message such as a greeting, unavailable, or busy message. <p>If you select <i>Scheduled</i> for Greeting, click <i>New</i> to add a system schedule or create a new one. You can also add a greeting which is the audio file you configured when clicking <i>Audio file</i>.</p> <p>The purpose of having a separate voicemail name file is for occasions that you just want to change the name without touching the greeting file.</p>
Display Preference	
Default portal	Select the default user portal.
Prompt language	Select the prompt language for the extension. The default is English.
Web language	Select the language for the user portal.
Theme	Select the display theme for the user portal.
Time zone	Select the time zone for the user portal.

GUI field	Description
Idle timeout	Specify the period of time (in minutes) that the user portal session can remain inactive before the system logs you out.
Account Management	
Change PIN number	Click to change the personal identification number (PIN) for accessing the voice mailbox and FortiVoice user portal.
Change User Password	Click to change the password for accessing the FortiVoice user portal.
SIP User ID and Password	Click to display the extension number and the SIP user password which is used for configuring your SIP phone from the phone or the user portal.
Agent	
PIN required to login/logout from phone	Select to enable an agent to log into/log out of a queue from the extension using the user PIN. For information on feature access codes, see Viewing feature access codes on page 10 .
PIN required to pause/unpause from phone	Select to enable an agent to pause/unpause a queue from the extension using the user PIN. To pause means the agent is not answering calls. For information on feature access codes, see Viewing feature access codes on page 10 .
Auto-pause after agent login queue	Select to automatically put the agent in pause (not ready) status after the agent logs into a queue. The agent can unpause a queue to answer calls. For information on feature access codes, see Viewing feature access codes on page 10 .
Speed Dial Setting	Collapse and enter a phone number in the <i>Number</i> field to map a phone key with a phone number for speed dialing
Follow Me	This feature allows a call to your extension to be transferred to another destination when you are not available. To configure follow me: <ol style="list-style-type: none"> 1. Click New. 2. Enter a Name for this setting. 3. Under Follow Me Numbers, click New to enter a phone number to which the call to your extension can be transferred. 4. Enter the phone ringing duration in seconds before the call goes to voicemail. 5. Click Create, then Create. Repeat the steps to add more numbers if you want to transfer a follow me call to multiple numbers in a sequence. The numbers will be dialed according to the sequence in the follow me setting.
Black List	Click <i>New</i> to enter the phone number you want to block from calling your extension.
Call Handling	For more information on quick call handling, see Handling calls on page 19 .

GUI field	Description
	Effective mode lists the three default schedules. After you set up quick call handling schedules, you can dial *721, *722, or *723 followed by the voicemail password to temporarily replace the original schedule with one of the three default ones. You may also modify the temporary schedule. Dial *720 to go back to the original schedule.
Twinning Setting	<p>This option is only available if <i>Twinning</i> is selected in the user privileges of the extension.</p> <p>If you want to enable twinning, select one of the following settings:</p> <ul style="list-style-type: none"> • Simple: Select to configure a basic twinning by adding a phone number. • Scheduled: Select to configure twinning by adding phone numbers based on a schedule.
Phone Profile	<p>Phone profiles contain the phone configurations that are mostly used and customized, such as the programmable phone keys. Phone profiles make extension configuration more flexible because phone users are allowed to choose the profile they want. In addition, any changes the administrator makes to a profile is automatically applied to the extensions that use the profile.</p> <p>This option is only available for FortiFone 260i and above.</p>
Phone profile	<p>Select a profile type if your phone type is FortiFone 260i and above:</p> <ul style="list-style-type: none"> • <i>Admin defined</i>: Choose this type to select a system level phone profile which defines the phone configuration. You can only view the profile. • <i>User defined</i>: Choose this type to set the programmable phone keys. For details, see Configuring phone profiles on page 14. <p>Select a profile if your phone type is other than FortiFone 260i and above.</p>
FortiFone Call Preference	If this extension is for a FortiFone, you can configure its call preferences.
Direct call	Select to add direct call function to this phone, that is, as soon as you pick up the phone, it dials the number you set automatically.
Direct call number	If you select <i>Direct call</i> , enter the number to call. For example, the number of your paging system.
Direct call timer	<p>Enter the time in seconds to wait before the number dialing starts after the phone is picked up.</p> <p>You can enter a different number to call before the set time expires.</p>
Auto answer	Select to enable this phone to automatically answer phone calls without being picked up.

3. Click *Apply*.

Handling calls

Preferences > Preferences > Call Handling allows you to manage the call process. For example, you can configure the process to forward a call to another number on a specific schedule.

You can manage quick call handling by dialing a code to enter into a default mode and configure the call process for that particular mode if required.

If the extension with configured call handling action is part of another FortiVoice function that also has configured call handling action (for example, a member of a ring group or used for a virtual number), then the call handling action of the other FortiVoice function overrides the extension call handling action.

To handle a quick call

1. Go to *Preferences > Preferences > Call Handling*.
2. Click *Quick call handling*.
3. Select a call status at the top of the page.
Each status can only be used for one call management configuration.
4. For *Call Process*, select *System default action* or *User defined* action except for the *Out of office* status.
5. If you select *System default action*, the three quick call modes are the same as listed under *Effective mode*.
6. If you select *User defined*, click *New* to define a call process according to a schedule.
 - Select a pre-configured *Schedule* for the call action. You can click *View* to display the schedule details. Schedules can be created when configuring *Voicemail Options*.
 - Add an *Action* for the call process. You can add multiple actions to process a call in sequence. For example, you can add *Play announcement* and then *Auto attendant*. In this case, an incoming call will be transferred to the auto attendant after an announcement is played.
Default action is equal to the action when you select *System default action* under *Call Process*.
 - If you select *Follow me*, select a follow me profile. For information on configuring follow me, see [Follow Me on page 18](#). This option is available only if call forwarding is enabled by your administrator in the extension's user privilege.
 - If you select *Play announcement*, select a sound file. For information on configuring sound files, see [Customizing sound files on page 10](#).
 - If you select *Auto attendant*, select a system auto attendant profile.
 - If you select *Forward*, enter the number to which you want to forward the call.
This option is available only if call forwarding is enabled by your administrator in the extension's user privilege.
 - Click *Create*.
7. Click *OK*.

Using the operator console



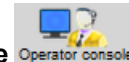
To have access to the **Operator console**, the FortiVoice system administrator must update the user privilege profile assigned to your extension to enable the operator role (Phone System > Profiles > User Privileges).

In the **Operator console**, you can perform the following tasks:

- Process phone calls on the web as your organization's phone operator.
- Manage the status of hotel rooms.

Opening the operator console

To open the **Operator console**, go to the top of the user portal window and click **Operator console**.



Showing a widget

If you close a widget in the operator console and want to make it visible again, then perform this procedure:

1. Click **Setting**.



2. Select **Add Content** and the widget that you want to show. If the list is empty, then all the widgets are already showing.

Managing active calls

When an active call appears in the **Active Call** widget, you can select the call and click one of the icons at the top of the widget to:

- Pick up the call.
- Hang up the call.
- Transfer the call by dragging and dropping it to an extension (or the voicemail of an extension) in *Idle*, *In Use*, *Busy*, *Ringing*, or *On Hold* status in the *Directory* widget.
- Park the call.
- Hold the call.

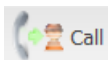
In the *Active Call* widget, you can filter calls by category, direction, and status. The *Call* filter has the following options:

- *All*: Displays all phone calls.
- *Short*: Displays ringing calls and calls to and from the operator extension.
- *Mine*: Displays calls to and from the operator extension.

Making a call

If you need to make a call as your organization's phone operator using the operator console, then you can do one of the following actions:

- In the *Directory* widget, right-click an extension and click *Call*.




- Click  and either enter or select an extension to call.

The *Active Call* widget shows the extension that you are calling.

Managing parked calls

Here is how the *Parked Call* widget works:

1. An extension parks a call on the system.
The call appears in the *Parked Call* widget.
2. In the list of the *Parked Call* widget, one of the users of the operator console can select the call and click *Unpark*.
The phone of that operator console user rings with the parked call.
3. To refresh the list of parked calls, click *Refresh* .

Checking the directory

The *Directory* widget lists the extensions for your organization. You can filter the extensions by user, group, conference, location, and type.

Managing hotel room status



Prior to accessing the Room Status widget, make sure that the FortiVoice system administrator performs the following tasks on the FortiVoice phone system:

- Load the hotel management license.
- Configure the hotel management settings. For details, see the Working with Property Management System section in the [FortiVoice Phone System Administration Guide](#).
- Set the user privilege (Phone System > Profile > User Privilege) with the Operator Role - Hotel room active and then apply that user privilege to your extension (Extension > Extension > IP Extension).

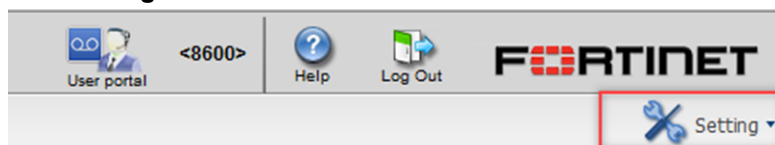
The Room Status widget shows hotel room statuses related to the information available or updated on the FortiVoice phone system under Hotel Management > Room Status.

After connecting the property management system (PMS) with the FortiVoice unit and enabling the PMS on the FortiVoice unit, all hotel room extensions appear on the FortiVoice unit.

Showing the Room Status widget

If the Room Status widget is not visible, then perform this procedure to show this widget:

1. Click **Setting**.



2. Select **Add Content > Room Status**.

Configuring the status of multiple hotel rooms

1. In the *Room Status* widget.
2. Select more than one room in the list.
Depending on the situations of the rooms you select, the *Check in*, *Check out*, *Privilege*, *Condition code*, and *Guest status* buttons become active.
3. Click a button to batch-configure the room status and apply it to all rooms.

Configuring the status of a single hotel room

1. In the *Room Status* widget.
2. Select a room extension and click *Edit*.
3. Configure the following:

GUI field	Description
Number	The extension number of the room. You can click the number and modify it if required.
Guest phone	Select to bind the extension with the room and make the room a guest room.
Room	The hotel room number. You can click the number and modify it if required.
Location	Click to enter the room location.
If you have selected Guest phone, configure the following:	
Checkin status	Choose the room status to configure: <i>Checked-out</i> or <i>Checked-in</i> .
Guest name	Enter the name of the guest for this room. This option is available only if the <i>Checkin status</i> is <i>Checked-in</i> .
Privilege	Select phone call restriction (internal, local, or long distance) and user privilege (option 1, 2, 3) for the room. For information on setting user privileges, see FortiVoice Phone System Administration Guide .
DND	Select if the guest of the room does not want to be disturbed. This option is available only if the <i>Checkin status</i> is <i>Checked-in</i> .
Room condition	Select the cleaning status of the room. You can add a new code or edit the current one. For more information, see Setting room condition codes on page 23 .

4. Click *OK*.

Setting room condition codes

1. In the *Room Status* widget.
2. Click *New* for *Room condition* to add a code or select an existing code and click *Edit* to modify it.
3. Select the protocol for connecting to your PMS.
4. Enter a code number.

5. Enter the code description.
6. Click *Create*.

Using the call center console

The call center console offers your organization an efficient way to receive, answer, and organize a large volume of phone calls.



To have access to the call center console, the FortiVoice system administrator must:

- Load the FortiVoice Call Center license on the FortiVoice phone system.
 - Complete the call center setup. For details, see the Setting up a call center section in the [FortiVoice Phone System Administration Guide](#).
 - Enable and set up the call center option for your extension.
-

Depending on your agent or manager profile, you can perform the following functions:

- Pick up a waiting call.
- Transfer a waiting call to an extension.
- Adjust caller priorities in a queue.
- Pause and resume your agent status with reason codes.
- Manage agents (coach, listen, log in, log out, and pause and resume agent statuses with reason codes).
- Initiate a callback.
- Monitor agent and queues status' in real time.
- Receive alerts by email, phone call, or pop-up window of prolonged waiting callers, too many callers (queue overflow) for the number of available agents.
- View call and agent details.
- View agent and queue statistics.

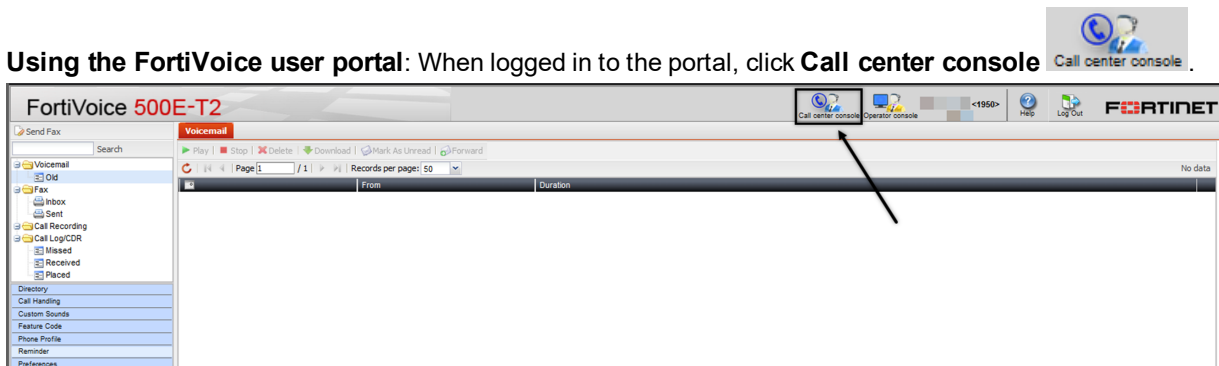
This section includes the following topics:

- [Logging in to the call center console on page 25](#)
- [Logging in to a queue on page 25](#)
- [Managing widgets on page 26](#)
- [Widgets on page 27](#)
- [Service-level alerts on page 38](#)
- [Monitor view on page 39](#)
- [Logging out of a queue on page 40](#)
- [Logging out of the call center console on page 40](#)

Logging in to the call center console

- To log in to the call center console, use one of the following two methods:

- **Using the FortiVoice user portal:** When logged in to the portal, click **Call center console**.



- **Using the direct access to the call center console:**

- In a web browser, go to the following URL:

`https://<IP_address_or_FQDN>/agent`

Where <IP_address_or_FQDN> is the IP address or FQDN of the FortiVoice phone system.

If the FortiVoice system administrator has changed the access port, then you must also include the port, for example:

`https://<IP_address_or_FQDN>:446/agent`

- Enter your extension and password.
- Click **Login**.

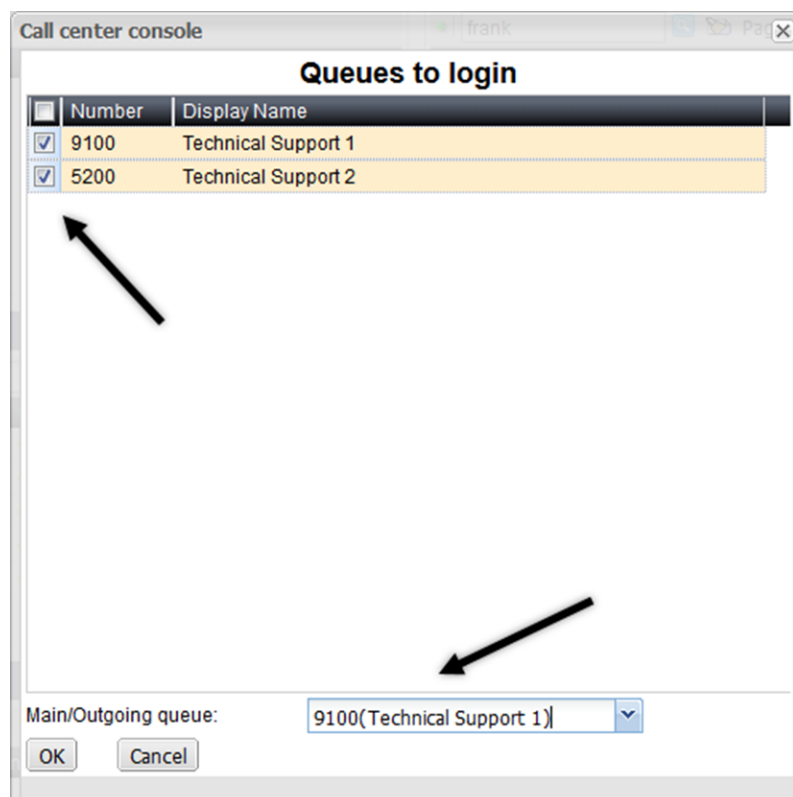
Logging in to a queue

- To log in to a queue, click .



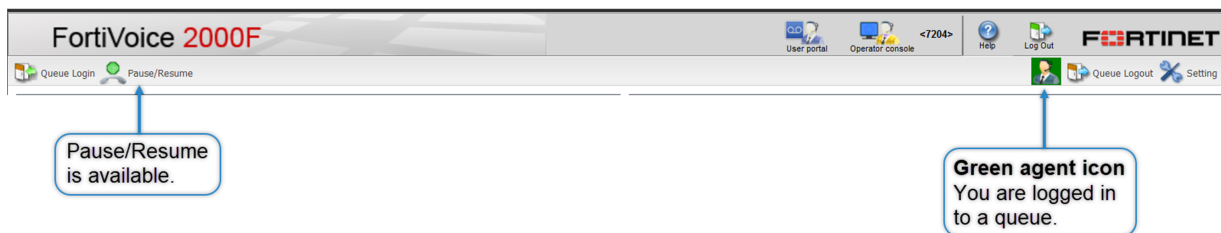
- Select queue(s) from the list.
- In **Main/Outgoing queue**, select a queue to specify the following behaviors:
 - **Main:** When you are a member of multiple queues, this selection addresses how calls are distributed to you. The queue you select is the one that rings your extension, if there is a possibility of multiple calls offered by multiple queues.
 - **Outgoing:** This queue is your default call queue used to track outbound calls such as taking a call from callback or returning a call. When the manager generates a queue report, the report includes outbound calls associated with the Main/Outgoing queue that you selected.

4. Click **OK**.



5. When you are logged in to the queue, you can see the following UI changes:

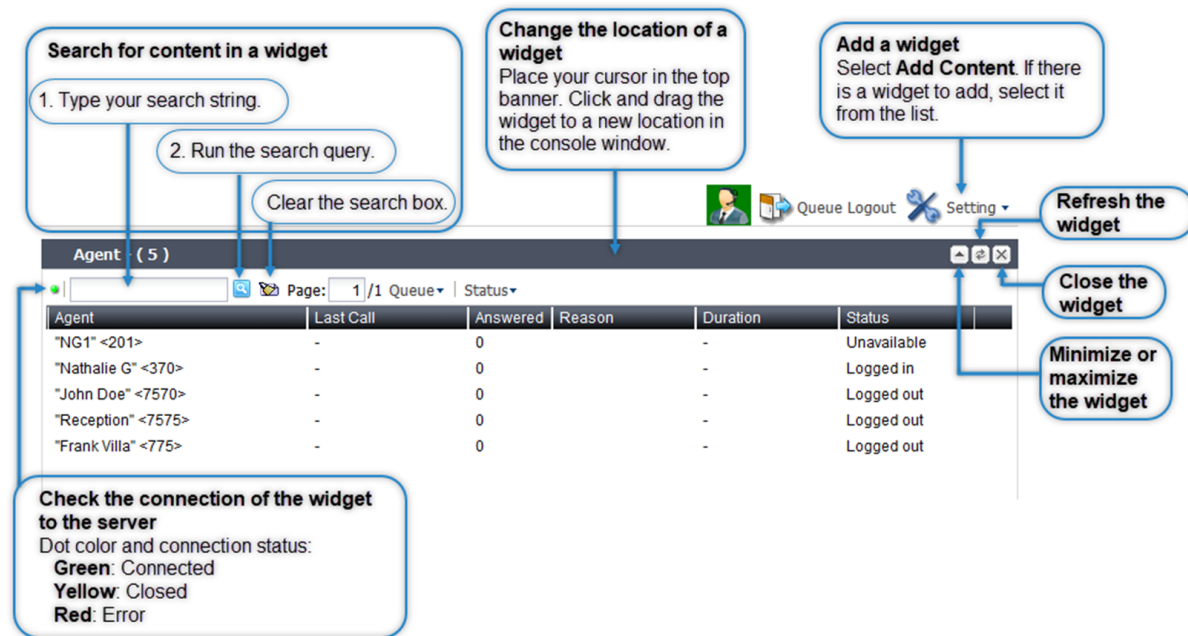
- The **Pause/Resume** icon is available instead of grayed out.
- The **Agent** icon is green.



Managing widgets

You can manage widgets to perform the following tasks:

- Minimize, maximize, refresh, close, and add widgets.
- Arrange the position of widgets in the call center console window.
- Search for content in a widget.
- Check the connection of a widget to the server.



Widgets

Depending on your agent or manager profile, the call center console can display the following widgets:

- [Waiting Caller on page 27](#)
- [Active Call on page 28](#)
- [Recent Calls on page 31](#)
- [Directory on page 32](#)
- [Agent on page 33](#)
- [Queue Stat Today on page 36](#)
- [Queue Agent Summary on page 37](#)
- [Queue Callback List on page 38](#)

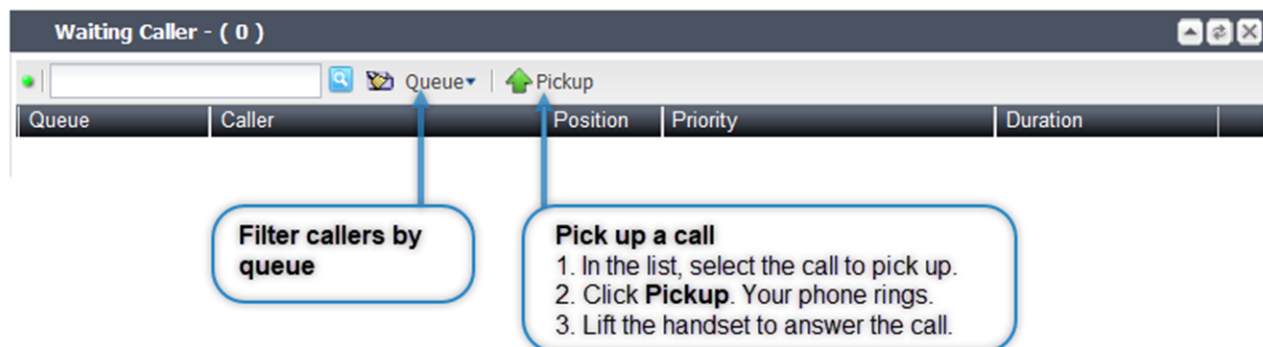
Waiting Caller

The **Waiting Caller** widget shows calls that are in a queue and waiting to be answered.

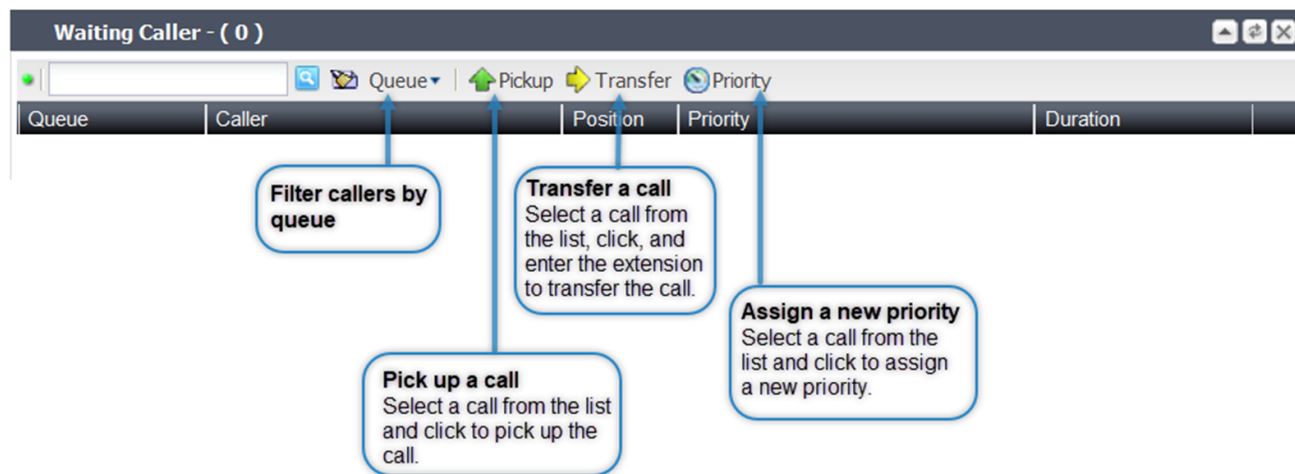
Depending on your profile, the **Waiting Caller** widget allows you to perform the following tasks:

- Filter callers by queue.
- Pick up the call of a selected caller.
- Transfer a call to another extension.
- Change the priority of a call.

Waiting Caller (agent profile view)



Waiting Caller (manager profile view)



Active Call

The **Active Call** widget displays all ongoing phone calls in real time.

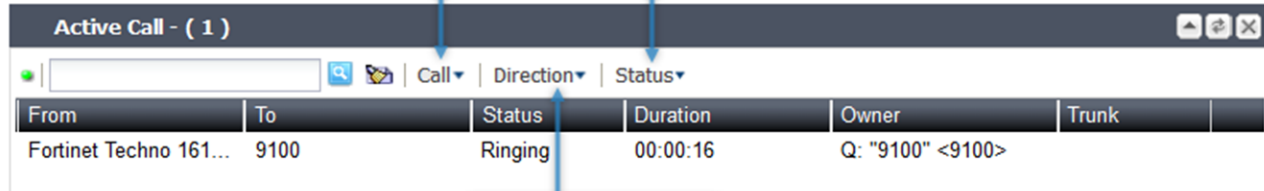
Active Call (agent profile view)

Filter call list

- **All:** Queued calls and answered calls.
- **Short:** Queued calls and calls that you have answered on your extension.
- **Mine:** Calls that you have answered on your extension only.

Filter active calls by status
Select all, ringing, answered, connected, voicemail, or on hold.

Filter active calls by direction
Select internal, outgoing, or incoming.



The screenshot shows the 'Active Call - (1)' window. It features a search bar, a filter icon, and three dropdown menus: 'Call', 'Direction', and 'Status'. Below these is a table with columns: From, To, Status, Duration, Owner, and Trunk. A single call is listed with the following details:

From	To	Status	Duration	Owner	Trunk
Fortinet Techno 161...	9100	Ringing	00:00:16	Q: "9100" <9100>	

Active Call (manager profile view)

Filter call list

- **All:** Queued calls and answered calls.
- **Short:** Queued calls and calls that you have answered on your extension.
- **Mine:** Calls that you have answered on your extension only.

Filter active calls by status

Select all, ringing, answered, connected, voicemail, or on hold.

Active Call - (1)

Monitor ▾ Call ▾ Direction ▾ Status ▾

From	To	Status	Duration	Owner	Trunk
UNKNOWN 161322...	Support Level 1 1100	Ringing	00:05:02	Q: "Support Level 1"...	trunk_FortiCall

Monitor call

Select a call from the list and then click to select one option:

- **Coach:** To speak to the agent only while the agent is on the call.
- **Listen:** To listen to a call.

Filter active calls by direction

Select internal, outgoing, or incoming.

Active call popup



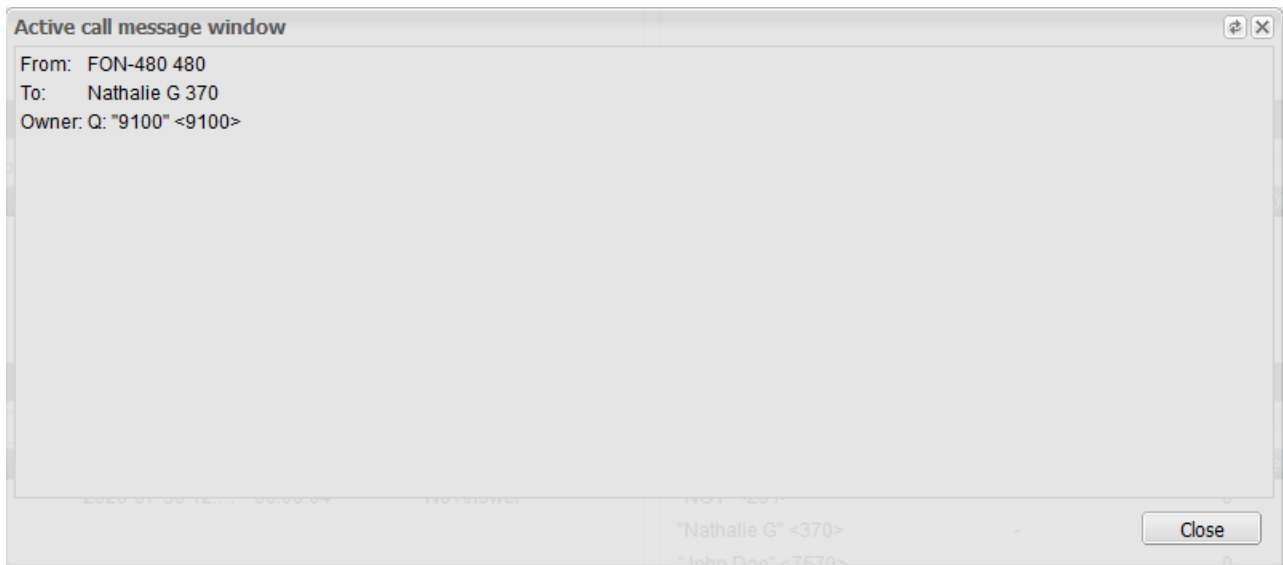
To see the active call popup, the FortiVoice system administrator must update the agent or manager profile to enable the **Popup active call** setting.

When you answer an active call, an active call window pops up.

This window displays the following details:

- From (name and extension)
- To (name and extension)
- Queue number for the owner
- IVR (interactive voice response), if available

Here is a window example of an active call popup:



Recent Calls

The **Recent Calls** widget shows a history of recent phone calls.

Recent Calls (agent and manager profiles view)

Filter recent calls by direction

Select all, internal, outgoing, or incoming.

Filter recent calls by disposition

Example choices are: no answer, failed, busy, answered, voicemail.

Recent Calls - (17)

Page: 1 / 0
Direction: --All--
Disposition: --All--

From (Name)	From	To (Name)	To	Start	Duration	Disposition
Arthur Curry	7205	Diana Prince	7207	2020-03-10 08...	00:00:12	Answered
Arthur Curry	7205	Diana Prince	7207	2020-03-10 08...	00:00:01	No Answer

Viewing recent call details

1. In the **Recent Calls** widget, double-click on a recent call entry.
2. You can review the call information, detail information, and call flow. Here is an example:

The screenshot displays the 'Call center console' interface. It is divided into three main sections: 'Call Information', 'Detail Information', and 'Call Flow'.

Call Information

- From: 16132259381
- To: 370
- Start: 2020-07-30 16:30:59
- Real duration: 00:00:16 (16 seconds)
- Disposition: Answered

Detail Information

- Answer: 2020-07-30 16:30:59
- End: 2020-07-30 16:31:16
- Source: 16132259381
- Dialed number/DNIS: 13438821528
- Destination: 9100
- Trunk: 3438821528
- Bill duration: 00:00:16 (16 seconds)
- Direction: Incoming
- Department:
- Unique ID: 1596141039.30
- Call type: Voice
- Account code:

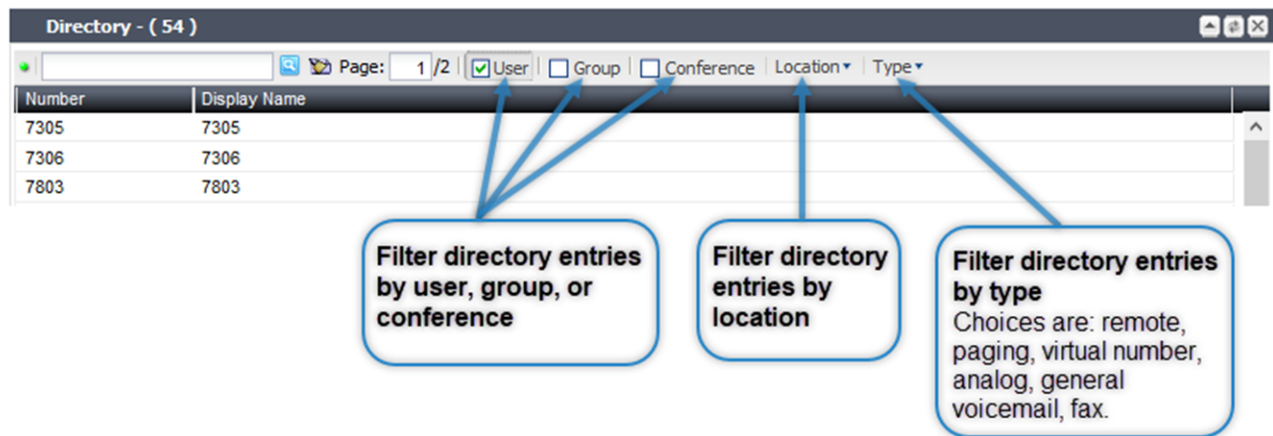
Call Flow

Page 1 / 1 | Records per page: 50 | Download | Total: 9

Time	Description
16:30:39	incoming call matched dialplan:FortiCall_Inbound on trunk:trunk_3438821528, caller:"Fortinet Techno" <16132259381>
16:30:45	enter auto attendant:auto_attendant_default
16:30:51	user input:3 through auto attendant:auto_attendant_default
16:30:51	deliver call to queue 9100 with priority 0
16:30:52	caller enter queue 9100 at position 1 with real priority 0
16:30:59	call picked up by 370
16:31:16	call hangup by agent 370
16:31:16	agent 370 start wrapup until 2020-07-30 16:31:16
16:31:16	call hangup by callee, status:NORMAL

Directory

The **Directory** widget shows the company directory and lists the extension (number) and display name for every entry.



Agent

With the agent profile, you can perform the following tasks in the **Agent** widget:

- View a list of agents that are members of your queue.
- Access agent details.
- Take a pause from answering calls in a queue without logging out of a queue by assigning a pause reason code. To resume taking calls again, you unpause your status.

With the manager profile, you can perform the following additional tasks in the **Agent** widget:

- Log in or log out an agent of a queue.
- If you want a logged in agent to pause from answering calls from a queue, but you do not want to log that agent out of the queue, you can pause that agent and assign a pause reason code. The agent stops receiving calls until you unpause that agent.

Agent (agent profile view)

Pause or resume your agent status

Click to pause your logged in status for a selected queue and assign a reason code or resume your active logged in status.

FortiVoice 1000E

Queue Login Pause/Resume

Agent - (4)

Page: 1 / 1 Queue Status

Agent	Last Call	Answered	Reason	Duration	Status
"NG2" <7370>	-	0		-	Logged in
"John Doe" <7570>	-	0		-	Logged out
"Reception" <7575>	-	2		-	Logged in

Filter agents by queue

Filter agents by status
Choices are: in use, logged out, logged in, paused, wrap up, and hold off.

Agent (manager profile view)

The screenshot shows the 'Agent - (7)' interface. At the top, there is a search bar and a 'Page: 1 / 1 Queue' dropdown. Below this is a table with columns: Agent, Last Call, Answered, Reason, Duration, and Status. The table lists four agents: 'Juliet Higgins' <7101> (Logged in), 'Room 1' <1001> (Logged out), 'Luke Fox' <7107> (Logged out), and 'Barry Allen' <7203> (Logged out). Callouts provide instructions for various actions: 'Filter agents by queue' points to the Queue dropdown; 'Filter agents by status' points to the Status dropdown, with a list of choices: in use, logged out, logged in, paused, wrap up, hold off; 'Log in an agent in a queue' points to the Login button; 'Log out an agent of a queue' points to the Logout button; and 'Pause or resume an agent status' points to the Pause/Resume button, with instructions to select a logged in agent and click to select a queue and assign a reason code or resume normal status.

Filter agents by queue

Filter agents by status
Choices are: in use, logged out, logged in, paused, wrap up, hold off.

Log in an agent in a queue
Select an agent and click to log that agent in a queue.

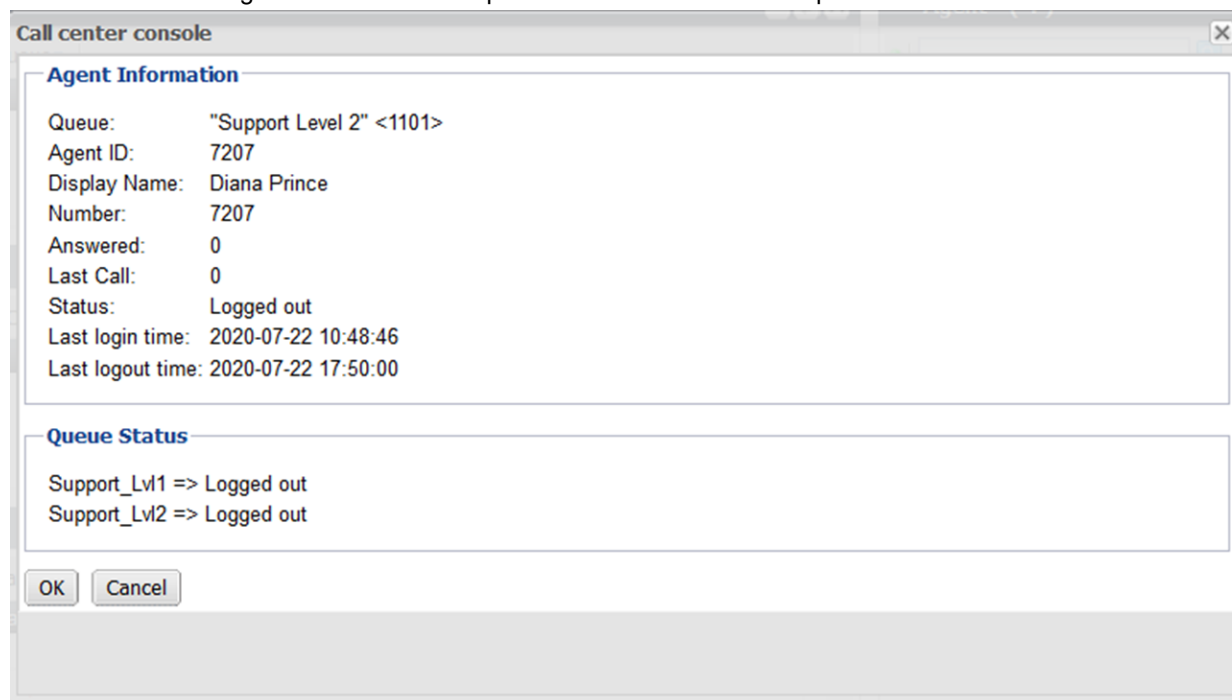
Log out an agent of a queue
Select an agent and click to log that agent out of a queue.

Pause or resume an agent status
Select a logged in agent and click to select a queue and assign a reason code or resume normal status.

Agent	Last Call	Answered	Reason	Duration	Status
"Juliet Higgins" <7101>	-	0			Logged in
"Room 1" <1001>	-	0			Logged out
"Luke Fox" <7107>	-	0			Logged out
"Barry Allen" <7203>	-	0			Logged out

Viewing agent details

1. In the **Agent** widget, double-click on an agent.
2. You can review the agent information and queue status. Here is an example:



Queue Stat Today

With the **Queue Stat Today** widget, you get a statistics summary of the call activities for the day.

For more details about the abbreviations used in the column headings, see [Abbreviations used in the Queue Stat Today widget](#) on page 36.

Queue Stat Today - (2)											
Queue	CT	CAn	CAb	COF	CTr	CTO	CTT	CWT	OB	OBT	
"Support Level 1" <1100>	1	0	1	0	0	0	00:00:00	00:00:13	0	00:00:00	^
"Support Level 2" <1101>	0	0	0	0	0	0	00:00:00	00:00:00	0	00:00:00	v

Abbreviations used in the Queue Stat Today widget

Abbreviation	Full name
CT	Call total
CAn	Call answered

Abbreviation	Full name
CAb	Call abandoned
COF	Call overflowed
CTr	Call transferred
CTO	Call timed out
CTT	Average talk time
CWT	Average wait time
OB	Outbound call
OBT	Outbound call average talk time

Queue Agent Summary

With the **Queue Agent Summary** widget, you get statistics of agent activities.

For more details about the abbreviations used in the column headings, see [Abbreviations used in the Queue Agent Summary widget on page 37](#).

Queue	AT	ALI	AAv	ATK	APS	AHD	LTT	LCW	CW
"Support Level 1" <1100>	4	2	2	0	0	0	00:00:00	00:00:00	0
"Support Level 2" <1101>	4	1	1	0	0	0	00:00:00	00:00:00	0

Abbreviations used in the Queue Agent Summary widget

Abbreviation	Full name
AT	Agent total
ALI	Agent logged in
AAv	Agent available
ATK	Agent talking
APS	Agent paused
AHD	Agent on hold
LTT	Longest talk time
LCW	Longest call waiting time
CW	Call waiting

Queue Callback List

With the **Queue Callback List** widget, the agent and manager get a list of callers that have requested to be called back instead of waiting for a prolonged hold time to speak with an agent.



For the **Queue Callback List** widget to display call information, the FortiVoice system administrator must complete the following changes on the FortiVoice phone system:

- In **Call Center > Call Queue > Call Queue**, edit the **Additional Setting** of a queue:
 - Enable **Callback Setting**.
 - Update the **Callback mode** to **Agent Call Back Manually**.

Queue Callback List (agent and manager profiles view)

The screenshot shows the 'Queue Callback List - (1)' widget. It includes a table with columns: Queue, Call ID, Caller Number, Caller Name, Callback Num..., Position, and Create Time. The first row shows 'Support_Lvl1' with a call ID '1595600449.1...' and a caller number '16132259381'. Annotations include: 'Initiate a callback' pointing to the 'Call ID' column, 'Filter callback callers by queue' pointing to the 'Queue' column, and 'Change refresh setting' pointing to the refresh icon in the top right corner.

Initiate a callback
Select a call in the list and click.

Change refresh setting
Click to select an automatic refresh interval for the callback queue.

Filter callback callers by queue

Queue	Call ID	Caller Number	Caller Name	Callback Num...	Position	Create Time
Support_Lvl1	1595600449.1...	16132259381	UNKNOWN	16132259381	1	2020-07-24 10...

Service-level alerts

When setting up a call queue, the FortiVoice system administrator can configure the FortiVoice unit to notify managers by email, phone call, or GUI pop-up window when an event occurs on the system.

The FortiVoice system administrator can configure one or more of the following events:

- **Queue overflow:** The manager receives a notification when the system reaches the maximum queue capacity. The FortiVoice system administrator configures this setting and the related overflow call handling during the queue creation.
- **Agent available ratio below:** This setting specifies a percentage for the agent available ratio. If the ratio falls below the specified percentage, the FortiVoice phone system sends an alert.
- **Caller waiting timeout:** If a call is not answered within the maximum number of minutes specified in the maximum queuing time, the FortiVoice phone system sends an alert and handles the call according to the timeout call handling setting.
- **Caller waiting over:** Specifies the maximum number of minutes that a caller can wait before the system sends an alert.

- **Number of waiting caller over:** Specifies the maximum number of waiting callers that the system can have before the system sends an alert.

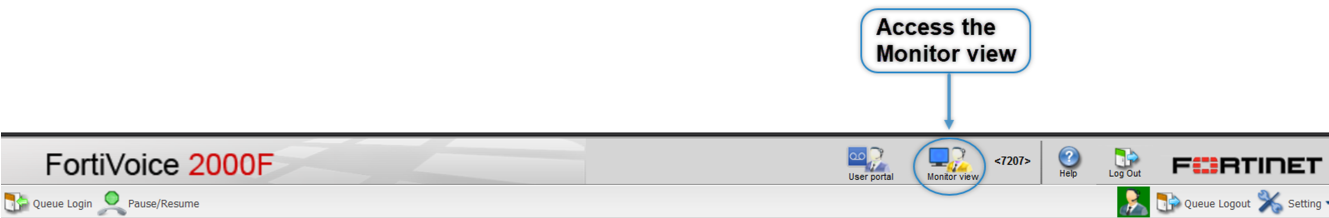
Monitor view

With the **Monitor view**, you get access to a wallboard to monitor items such as queues and agent performance.



To have access to the monitoring function, the FortiVoice system administrator must update the manager profile to enable the monitoring console privilege.

Accessing the Monitor view



In the following example, the manager completed the creation of a help desk wallboard on the FortiVoice phone system to monitor the following performances:


- Queue performance

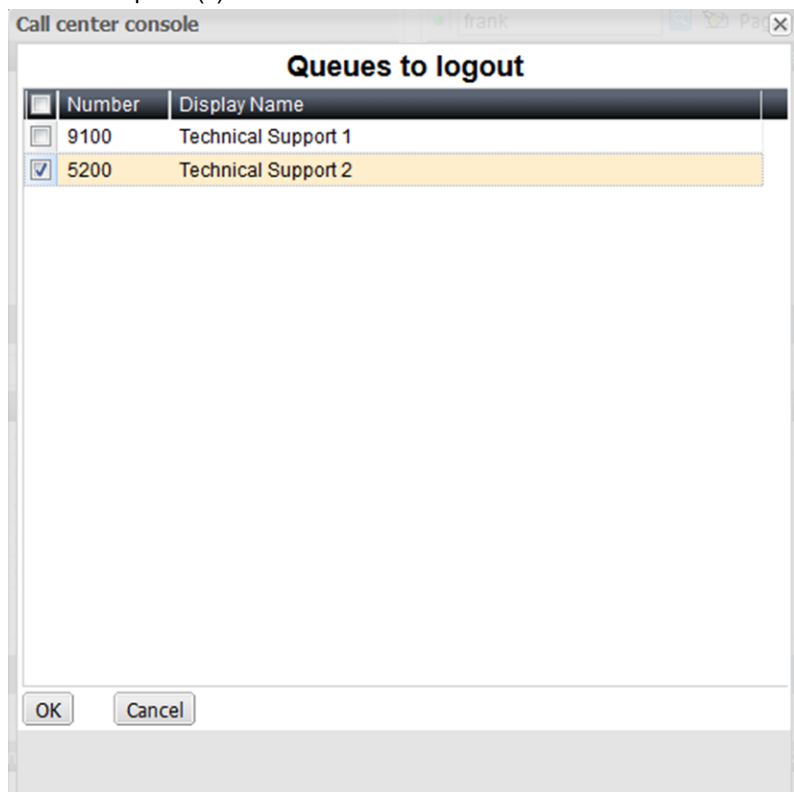
FortiVoice 200F8		Queue_Perfo...				
		Calls In Queue	Longest Waiting	Abandoned	Received Today	Answered Today
Help Desk 8500		0	0:00:00	0	1	1

- Agent performance

Help_Desk	Status	Time	Status	Time	Status	Time
Agent-1 3011	Idle	1:04:59				
Agent-2 3012	Idle	0:03:40				


Logging out of a queue

1. To log out of a queue, click  Queue Logout.
2. Select the queue(s).



3. Click **OK**.

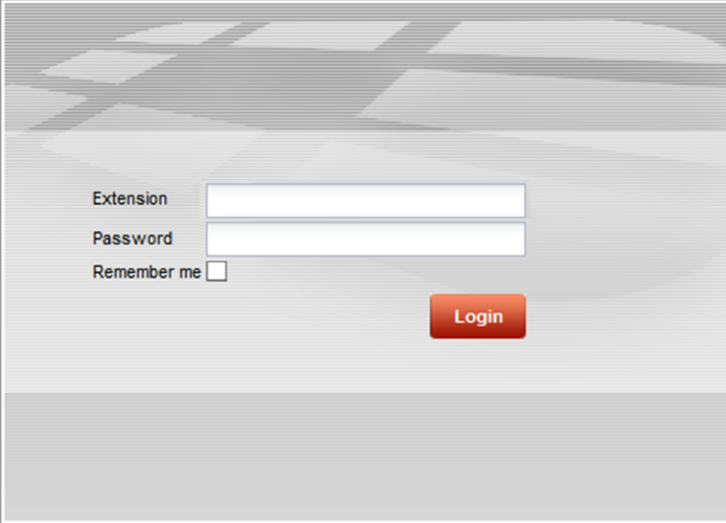
Logging out of the call center console

1. To log out of the call center console, click .



2. If you are still logged in to one or more queues, follow the prompts to log out of the queues.

3. After completing the console logout, the following dialog box appears:



A login dialog box with a light gray background and a subtle geometric pattern. It contains three input fields: 'Extension' and 'Password' are text boxes, and 'Remember me' is a checkbox. Below these fields is a red 'Login' button. The dialog box has a thin gray border.

Extension

Password

Remember me ☐

Login



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