



BPS Guide

FortiClient EMS 7.4



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FortiClient EMS 7.4 BPS Guide

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Overview

FortiClient 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 EMS and FortiClient.

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

- Initial EMS setup:
 - Sizing
 - FortiClient Connectivity
 - AD integration
 - Server preparation
- EMS migration: migrating to a new EMS server or migrating endpoints to a new EMS
- EMS configuration:
 - Email alerts
 - Licensing
 - Management capacity planning
- EMS upgrade planning:
 - Sequence
 - Testing
- RBAC and LDAP/AD integration:
 - Grouping endpoints
 - Assigning profiles
- Fortinet Security Fabric integration:
 - EMS connector
 - Endpoint tags
 - FortiAnalyzer logging
- Endpoint policy:
 - Assigning profiles to users or devices
 - How to provision profiles
 - Advice on grouping like endpoints
- Endpoint profile:
 - How to configure security features to accomplish security needs
 - Effects and cautions when enabling specific features

- Client deployment:
 - What OSes are supported (Windows, Mac, Servers (Windows + Linux))
 - Deploying from EMS or using 3rd party software
- Remote access:
 - VPN configuration
 - Auto-connect
 - Always up
 - VPN before logon
- EMS redundancy:
 - HA
 - Disaster recovery
 - Effects on the FortiClient in the event of outages
- FortiSASE onboarding
- ZTNA onboarding

For more details on the Best Practice Service, see the following resources:

- [FortiClient Ordering Guide](#)
- [FortiClient Data Sheet](#)

Limitations



The scope of the service is only for the EMS product alone. For all other product configurations, the BPS engineers will provide documentation on best effort. If a customer requires assistance or best practices for FortiGate setup such as configuring VPN, zero trust network access, and other configurations on other products, they may reach out to their respective account team to involve professional services at additional cost.

Limitation	Description
BPS engineer remote control	BPS engineers do not directly access or take remote control of the customer EMS server, whether it is deployed on-premise or in the cloud, to configure it on behalf of the customer.
Product	<p>BPS is limited only to the FortiClient and EMS product and its integrations with other Fortinet products. BPS does not cover support for third-party deployment products.</p> <p>The FortiClient BPS team does not provide assistance or consulting regarding other Fortinet product configurations, such as for FortiGate, FortiManager, FortiAnalyzer, and so on.</p>
Technical assistance	For technical assistance beyond the scope of BPS, engaging the Fortinet technical assistance center is advised for additional support and troubleshooting.

How and when to initiate a BPS onboarding request

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

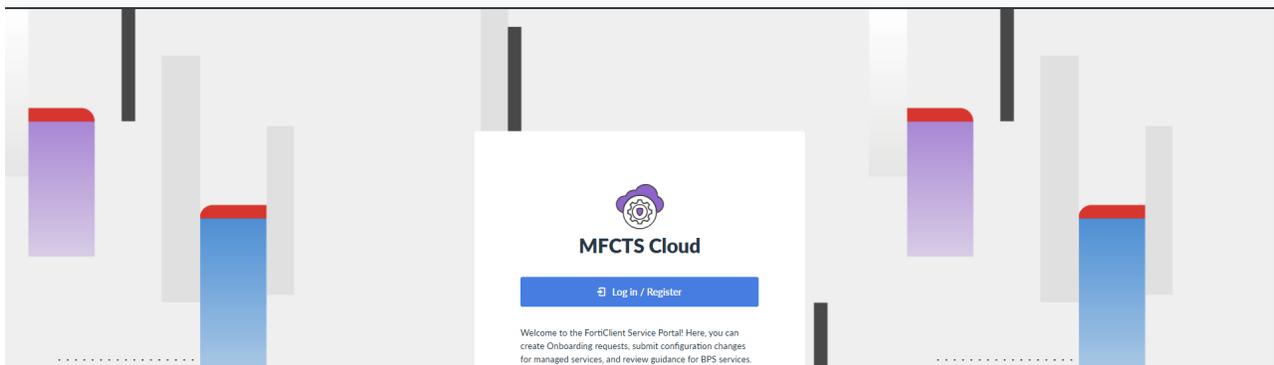


Register your BPS and EMS contracts to FortiCloud before initiating the onboarding request.

To initiate BPS onboarding request:

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

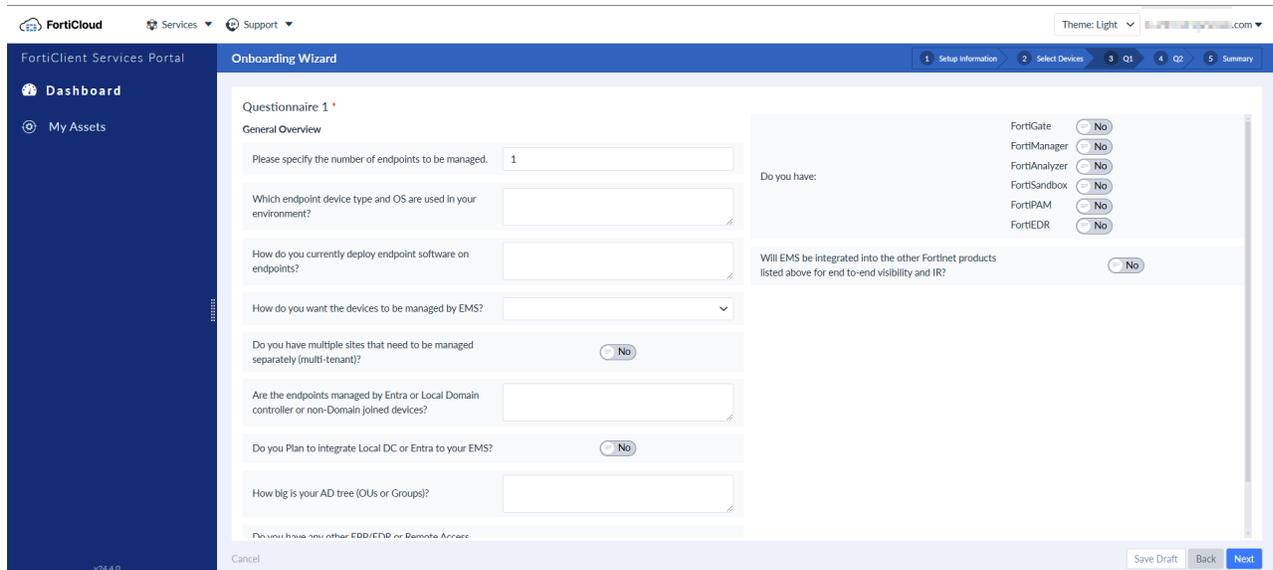
FORTINET | FortiClient Services Portal



2. Go to *My Assets*. Confirm that it lists your EMS serial number and respective service entitlement. 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 EMS 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
FCTEMS88244940207	Entitled	Entitled	Not-Onboarded	FortiClient EMS / FortiSASE	FortiClient EMS Cloud	August 27, 2025	Not-Entitled
FCTEMS88244940208	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 EMS instance. 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 EMS installation	Seek assistance from BPS experts during the initial setup and configuration of EMS, especially for on-premise deployments.
Initial planning for FortiClient Cloud	Engage BPS early in the planning phase for deploying FortiClient Cloud to leverage expert guidance and best practices.
On-premise EMS to FortiClient Cloud migration	BPS can provide support and guidance during the migration process from on-premise EMS to FortiClient Cloud.

Scenario	Description
Post-deployment configuration review	Use BPS for reviewing and optimizing EMS 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 FortiClient and EMS.

Migrating on-premise EMS to FortiClient Cloud - BPS license

Situation 1

If you have not onboarded the device to the FortiClient Services portal , submit an onboarding request. See [How and when to initiate a BPS onboarding request on page 6](#).

Situation 2

If you have onboarded the device earlier but require further assistance, create a service request for that device.

1. Log in to [FortiClient Services Portal](#).
2. Select *Service Request* and click *+ Service Request*.
3. Provide the information that the dialog requests. Also provide the following information:
 - On-premise EMS version
 - Installed FortiClient versions
 - Windows, Linux, and macOS versions
 - EMS integration with other Fortinet products, such as FortiGate, FortiManager, FortiAnalyzer, and FortiSandbox
 - EMS integration with local Active Directory or Microsoft Entra ID
4. Click *Add* to submit the request. The BPS team engages with you via this service request for assistance.



This procedure is the same for all existing onboarded devices if you need to engage the BPS team for further assistance



Migrating on-premise EMS to FortiClient Cloud may require upgrading your on-premise EMS and FortiClient. If there are any compatibility issues with the FortiClient Cloud version, the BPS engineer will inform you during your call.



If you already started setting up your FortiClient Cloud before creating a BPS ticket for migration and encounter compatibility issues, the BPS engineer may need to delete the instance. The BPS engineer will advise you if this is necessary.

Change log

Date	Change description
2024-09-20	Initial release.
2025-01-16	Added How and when to initiate a BPS onboarding request on page 6 .
2025-01-20	Updated Migrating on-premise EMS to FortiClient Cloud - BPS license on page 9 .
2025-03-07	Updated How and when to initiate a BPS onboarding request on page 6 .
2025-06-12	Updated Overview on page 4 .
2025-07-21	Updated How and when to initiate a BPS onboarding request on page 6 .



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