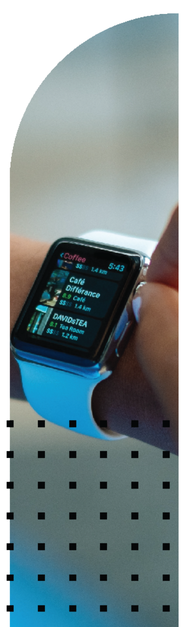
User Portal Guide

FortiVoice 6.4.3



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November 12, 2021
FortiVoice 6.4.3 User Portal Guide
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TABLE OF CONTENTS

Change log

Date	Change description
2021-07-08	Initial release of the FortiVoice 6.4.3 User Portal Guide.
2021-11-12	Minor editing changes.

Introduction

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

- Check your call history for received, placed, or missed calls.
- Check your voicemail including playing, deleting, forwarding, or saving voicemails.
- Manage your business and personal contacts, and view the business and corporate phone directories.
- Manage how the phone system handles your phone calls.
- Check your recorded calls including playing, deleting, or saving the voicemails.
- Receive and send faxes.
- Set up reminder events and invite guests.
- Add user conference call events in your calendar and invite attendees by email.
- View device details of desk phones and soft phones, and set up programmable keys.
- Configure your extension according to your preferences.
- Use the operator console to process organization calls.
- Use the call center console to process call queues.

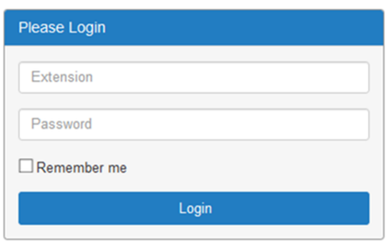
Available functions may vary depending on the privileges assigned to your phone extension by your FortiVoice system administrator.

Logging in and logging out of the FortiVoice user portal

Before you begin

- After completing the configuration of your extension on the FortiVoice phone system, the system administrator can share details about your account. Take note of the FortiVoice user portal link, your phone extension on FortiVoice and the user password for web access. You will need those details to log in to the FortiVoice user portal.
- Use one of the recommended web browsers. For details, see the FortiVoice Phone System Release Notes.

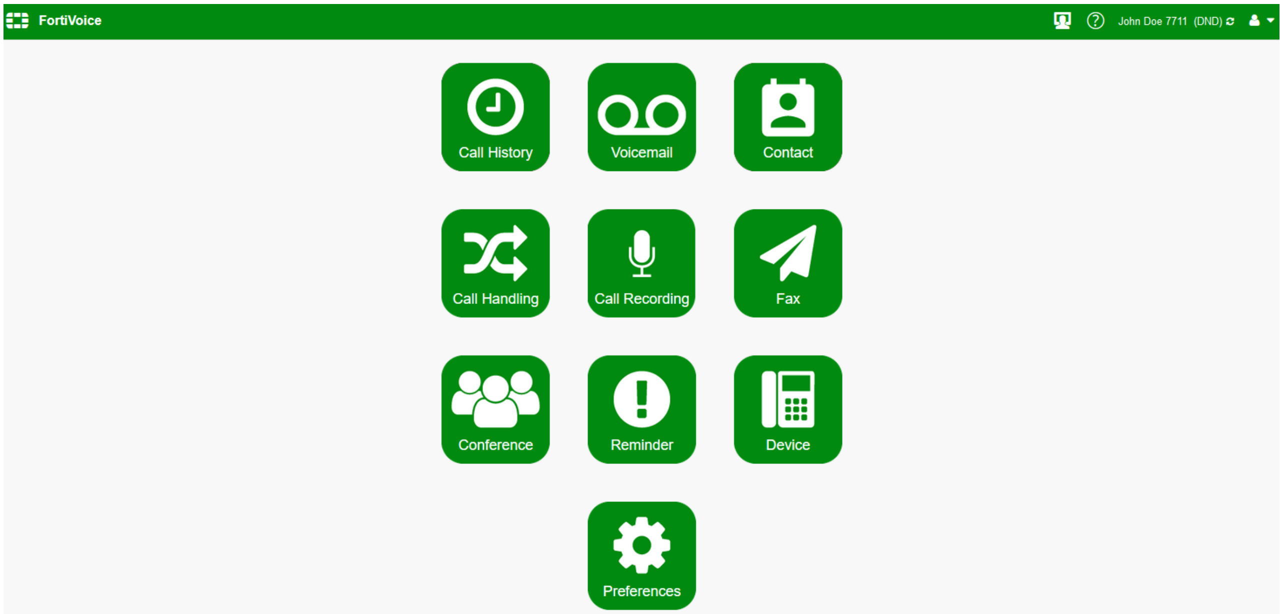
To log in to the FortiVoice use portal

1. Start a web browser and go to the FortiVoice user portal link.
   The link format is 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.
   The web browser prompts you to log in.
   

2. In **Extension**, enter your extension.
3. In **Password**, enter the user password for your extension.
4. Click **Login**.

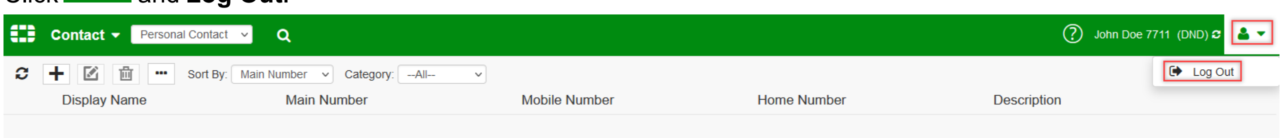
The main page of the FortiVoice user portal appears.

The widget selection may vary depending on the privileges that the FortiVoice system administrator has assigned to your extension.



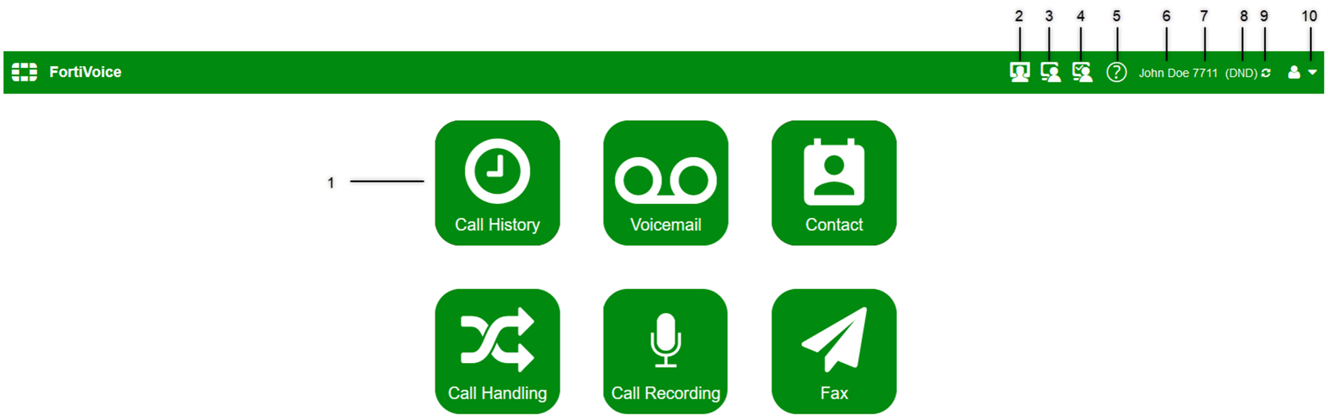
To log out of the FortiVoice user portal

1. Click  and **Log Out**.

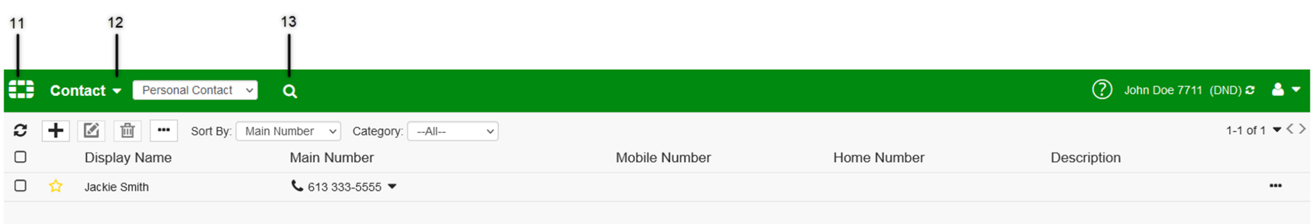


Navigating the FortiVoice user portal

Main page



Widget page example



Number	Description
1	The main menu gives you quick access to widgets. To open a widget, click on the icon.
2	Access the operator console. For more details, see Operator console on page 46.
3	Access the monitor view. For details, Monitor view on page 67.
4	Access the call center console. For more details, see Call center console on page 49.
5	Access the FortiVoice Cloud user portal documentation.
6	The display name associated with your extension.
7	Your extension number.
8	Your extension status such as: • DND (do not disturb) • In use

Number	Description
	• Not in use • Ringing
9	Refresh the status of your extension.
10	To log out of the FortiVoice Cloud user portal, click the down arrow and click **Log Out**.
11	To return directly to the main page, click the Fortinet icon.
12	To select another widget without going to the main page, click the down arrow and select the widget.
13	Access the search function.

Call history

The **Call History** menu displays all incoming and outgoing calls made to and from your extension. Your phone call records include the following details:

- Caller and receiver
  - The FortiVoice system administrator can enable the **Match personal contact** option. This option can affect the content in the **From (Name)** column of the **Call History**. With this option enabled, you can observe the following behavior: When an extension receives a phone call from a caller that already exists in the **Personal Contact** list, the **Call History** list will show the same ID (or caller ID) as the one used in the **Personal Contact** list.
- Time of the call
- Call duration
- Call status or disposition
- Call direction
- Call type

This section includes the following topics:

- Calling a person on page 12
- Viewing call details on page 13
- Searching call records on page 14
- Filtering call records on page 14
- Downloading call records on page 14
- Adding a personal contact on page 15
- Blocking a phone number on page 15

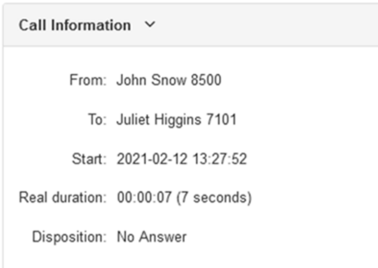
Calling a person

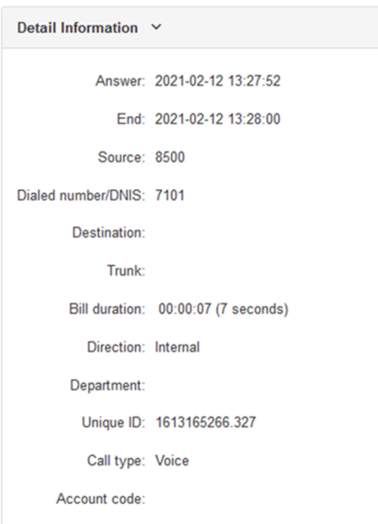
You can use **Call History** to call a person that has called you or a person that you have called.

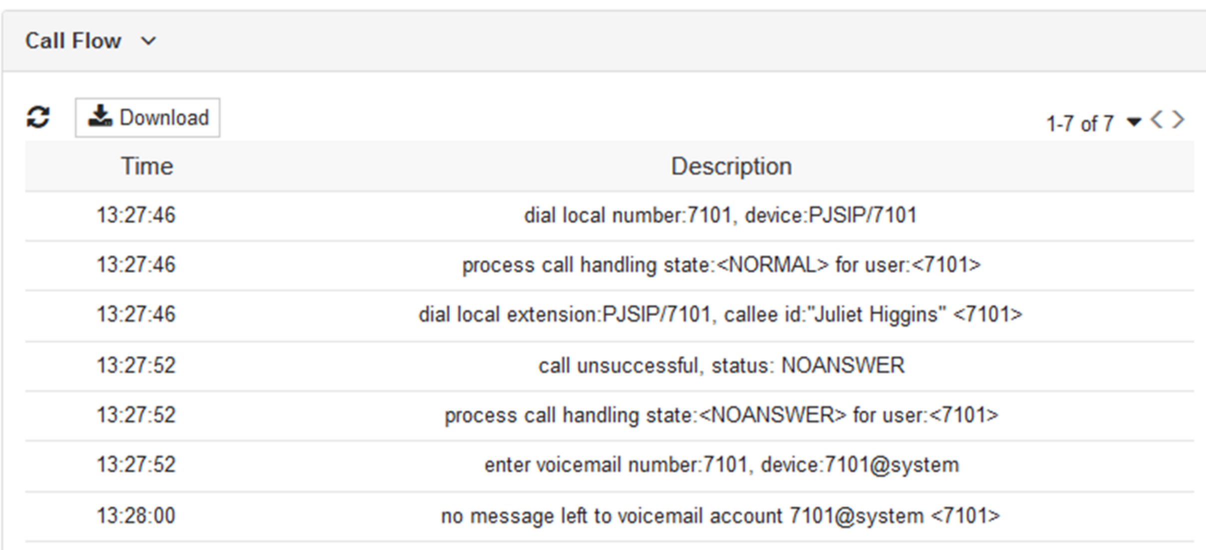
1. In **Call History**, locate the entry for the person that you want to call.
2. To initiate the call, click 📞 beside the name.

Viewing call details

1. In the call history list, double-click on an entry.
2. You can view the call information, detailed information, and call flow. Here are section examples:







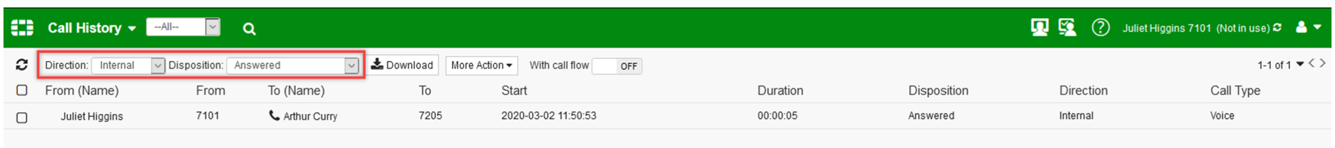
Searching call records

1. In **Call History**, click **Search** .
2. Enter a search string.
3. If you do not want to configure search settings, press **Enter**.
4. If you want to configure search settings, click , make your selections, and click **Search**.

Filtering call records

In **Call History**, you can apply additional filtering by selecting options available under the following drop-down menus:

- **Direction**
- **Disposition**



Downloading call records

To download all call records

1. In **Call History**, click **Download > All**.
2. Depending on your web browser settings, the CSV file may download automatically or you can take action to save the file.
3. If the downloaded file shows # characters, expand the column to show all the text.

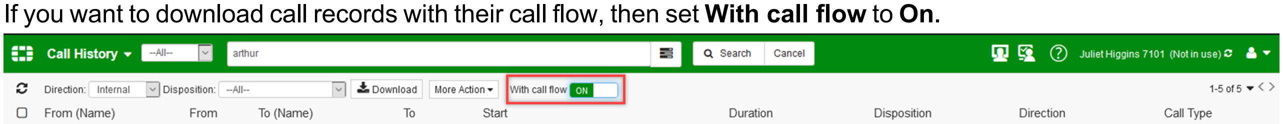
To download call records from a search

1. In **Call History**, click **Search** .
2. Enter a search string and press **Enter**.

Downloading call records with detailed call flows takes time and can impact the performance of the system.

The system can download the first 20,000 records only.

3. If you want to download call records with their call flow, then set **With call flow** to **On**.



4. Click **Download > Search Result**.

5. To confirm, click **OK**.
6. Open the downloaded file.
7. If the file shows # characters, expand the columns to display the information.

Adding a personal contact

You can select a caller in the call history to create a new personal contact.

1. In **Call History**, select the checkbox at the beginning of the row for the caller that you want to add.
2. Select **More Action > Add to Contact**.
3. Add a unique Display Name and other details for this contact.
4. Click **Create**.
5. To verify that the contact is in the personal contact list, go to **Contact > Personal Contact**.

Blocking a phone number

To prevent a caller from calling your extension, add the caller's phone number to the personal block list.

To be able to block phone numbers, the FortiVoice system administrator must enable the functionality on the FortiVoice phone system.

1. In **Call History**, select the phone number that you want to block.
2. Select **More Action > Block**.
3. To confirm, click **Block**.
4. To verify that the phone number is in the block list, go to **Contact** and click **Personal Block List**.

Voicemail

The **Voicemail** menu allows you to manage your voicemails.

This section includes the following topics:

Displaying your voicemails

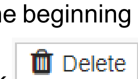
Use this procedure to display your voicemails including urgent and old ones.

1. Go to **Voicemail**.
2. From the drop-down menu, select one of the following filter choices:
   - **All**: Shows all voicemails for your extension.
   - **Inbox**: Shows new voicemails. After you listen to a voicemail, the system moves the voicemail to the **Old** list.
   - **Urgent**: Shows voicemails marked as urgent by the caller.
   - **Old**: Shows voicemails that you have already listened to.

Playing a voicemail

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to listen to.
3. Click **Play** .

Deleting a voicemail

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to delete.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click 

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Sending a voicemail to another extension

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to forward to another extension.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click **Forward**.
5. In **Forward to**, select the extension.
6. Click **OK**.

Downloading a voicemail

1. Go to **Voicemail**.
2. In the list, locate the voicemail that you want to download.
3. At the beginning of the row, select the checkbox for that voicemail.
4. Click **Download**.
5. To confirm the download of the WAV file, click **OK**.

Setting voicemail options

1. Go to **Voicemail**.
2. Click **Voicemail Options**.
3. Configure the following fields:

GUI field	Description
Voicemail handling	Enable to allow a caller to press 0 to talk to the operator during an announcement.
Name	• Set to **Standard** to use the system default name for the voicemail (the extension number), or set to **Personal** to use your own name for the voicemail. • If you select **Personal**, click **Call me** to record your own message using the phone, or click **Upload** to import a pre-existing sound file that meets the requirements (WAVE file in mono, 16 bit PCM, and 8 kHz compression format).
Greeting	Select the voicemail greeting mode and greeting content. Click **Audio file** to record or import a sound file for various scenarios, depending upon the greeting type selected: • **Standard**: The default system defined greeting. • **Simple**: The greeting that applies to any time.

GUI field	Description
	• **Scheduled**: The greeting that comes with a schedule. Click **New** to add a system **Schedule** and assign a **Greeting**. • **Conditional**: The greeting that applies when you are either busy or unavailable.

4. Click **OK**.

Contact

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

You can filter contacts by **Personal Contact**, **Business Contact**, or **Directory** from the top drop-down menu.

You can sort the **Personal Contact** list, by using the following filters:

- **Sort By**: Allows you to show contacts by display name or main number.
- **Category**: Allows you to show contacts for speed dial, favorite, or all.

You can update the **Personal Contact** list but the FortiVoice system administrator manages the **Business Contact** and **Directory** lists.

This section includes the following topics:

Calling a contact

1. Go to **Contact > Business Contact, Personal Contact, or Directory**.
2. To initiate a call, click the phone icon beside the extension or phone number.

Adding a personal contact

1. Go to **Contact > Personal Contact**.
2. Click +.

Make sure to fill in the **Main Number** field. This field is mandatory.

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3. Fill in the fields.
4. Click **Create**.

Editing a personal contact

1. Go to **Contact > Personal Contact**.
2. In the list, locate the contact that you want to edit.
3. At the beginning of the row, select the checkbox for that contact.
4. Click .
5. Edit the contact details.
6. To save the changes, click **OK**.

Deleting a personal contact

1. Go to **Contact > Personal Contact**.
2. In the list, locate the contact that you want to delete.
3. At the beginning of the row, select the checkbox for that contact.
4. Click .
5. To confirm, click **Delete**.

Importing a list of personal contacts

When you import a list of contacts, you overwrite any existing contacts in the personal contact list.

Use this procedure to import contacts from a file with data represented in a comma-delimited format also referred to as comma-separated values (CSV) in **Personal Contact**.

1. Go to **Contact > Personal Contact**.
2. Click and select **Import**.
3. Find the CSV file to import and click **Open**.

Exporting a list of personal contacts

Use this procedure to export contacts from **Personal Contact** to a CSV file.

1. Go to **Contact > Personal Contact**.
2. Click ⋯ and select **Export**.
3. Depending on your web browser settings, the CSV file may download automatically or you can take action to save the file.

Updating a personal contact favorite list

Use this procedure to add or delete a contact from your favorite list.

1. Go to **Contact > Personal Contact**.
2. To add a contact to a favorite list, click the star icon ☆ next to the display name.
3. To remove a contact from a favorite list, click the star icon ★ next to the display name.
4. To show only favorites in the contact list, in **Category**, select **Favorite**.

Updating a speed dial list of personal contacts

You can associate a phone number with a key pad number and create a contact speed dial list. Use this procedure to add or delete a number from a speed dial list.

1. Go to **Contact > Personal Contact**.
2. Next to the contact's number, click the down arrow ▾.
3. To add a number to the speed dial list:
   a. Select **Add to Speed Dial**.
   b. To associate the phone number with a key pad number, click a number in the list.
   c. Click **OK**.
4. To remove a number from the speed dial list, select **Remove from Speed Dial**.
5. To show only speed dial numbers in the contact list, in **Category**, select **Speed Dial**.

Configuring a personal block list

Use this procedure to maintain a phone number block list to prevent those defined numbers from calling your extension.

To be able to block phone numbers, the FortiVoice system administrator must enable the functionality on the FortiVoice phone system.

To block a phone number (not included in the personal contact list)

1. Go to **Contact > Personal Contact** and click **Personal Block List**.
2. Click **New**.

3. Enter a **Number**, and optionally a **Display name** and **Description**.
4. Click **Create**
5. To finish configuring your block list, click **Close**.

To block a phone number (included in the personal contact list)

1. Go to **Contact > Personal Contact**.
2. In the main number list, locate the number that you want to block.
3. Next to the contact's number, click the down arrow .
4. Select **Add to Block List**.
5. Optionally, add a **Description**.
6. To confirm, click **OK**.

Call handling

The **Call Handling** menu 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.

This section includes the following topics:

Enabling the Do not disturb setting

1. Go to **Call Handling**.
2. Under **Quick setting**, set **Do not disturb** to **ON**.
3. To save the change, click **OK**.

Enabling the Call forward setting

With call forward, you enter a phone number you want your calls forwarded to.

1. Go to **Call Handling**.
2. Under **Quick setting**, set **Call forward** to **ON**.
3. In the field provided, enter the telephone number to forward the calls.
4. To save the chance, click **OK**.

Managing a call

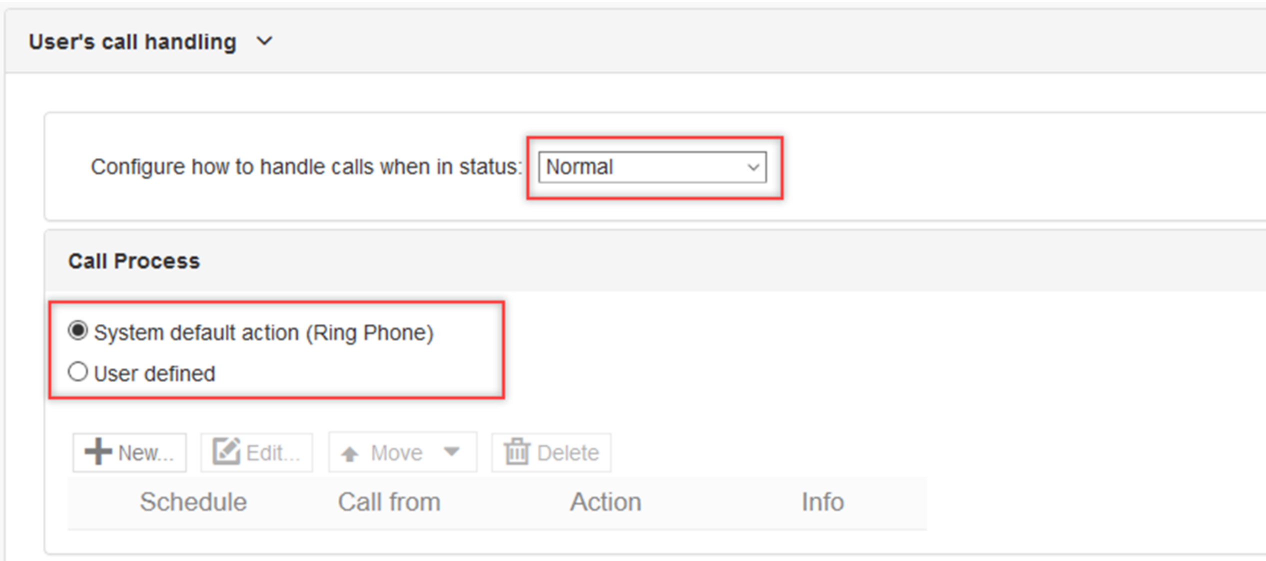
1. Go to **Call Handling**.
2. Under **User's call handling**, select a call status from the drop-down menu. Your choices are:
    - Normal
    - No answer
    - Busy
    - Do not disturb
    - Phone not connected

- Block list
- Voicemail

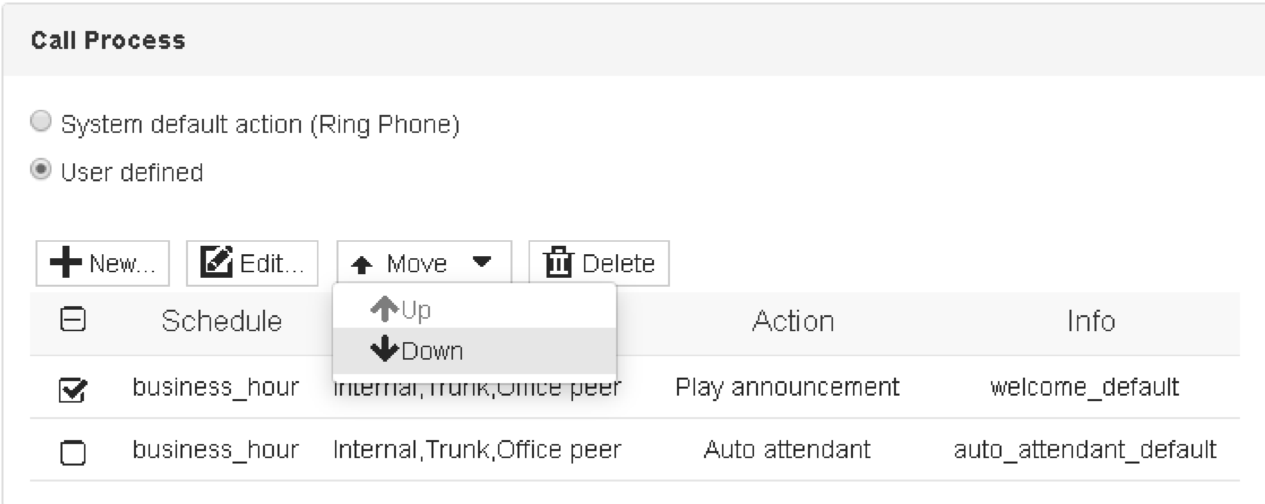
Each status can only be used for one call management configuration.

If you select **Block list**, the call management configuration will apply to the numbers added in the **Personal Block List** configuration. See Configuring a personal block list on page 21.

3. Set **Call Process** to either **System default action** or **User defined**.
   The **System default action** changes depending on the status selected. As shown in the example, a **Normal** status means the system default action is **Ring Phone**.



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. Once a schedule is assigned, you can click **View** to display the schedule details.
   - Select whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
   - Select an **Action** for the call process. Multiple user defined call process actions can be defined to process a call in a specific sequence. For example, you can create one call process with a **Play announcement** action, followed by another with an **Auto attendant** action.
     The **Default action** is the same as the system default action, determined by the call handling status.
     - If you select **Follow me**, select a follow me profile. For details, see Configuring the Follow Me setting on page 25.
       This option is only available if your administrator enables call forwarding in your extension's user privilege.
     - If you select **Play announcement**, select a sound file. For information about configuring sound files, see Customizing a sound file for an announcement on page 26.
     - 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 **OK**.
5. Your call process actions are shown. If necessary, you can change the order of the actions by selecting an action's checkbox and clicking **Move > Up** or **Move > Down**.



6. Click **OK**.

Configuring Quick call handling

Use Quick call handling to change your call handling settings temporarily while leaving your regular call handling settings unchanged. The quick call handling settings are tied to the settings under **Preferences > Quick Mode** (see Preferences on page 42).

You can manage Quick call handling by dialing a code to enter into a default mode and configure the call process for when your status is either **Out of office** or **Away**, or for another reason (**Other**).

To configure Quick call handling

1. Go to **Call Handling**.
2. Under **Quick call handling**, select a call status from the drop-down menu. Each status can only be used for one call management configuration.
3. Under **Call Process**, click **New** to define a call process according to a schedule.
    - Select a default **Schedule** for the call action. Once a schedule is assigned, you can click **View** to display the schedule details.
    - Select whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
    - Select an **Action** for the call process. Multiple call process actions can be defined to process a call in a specific sequence.
    - Click **OK**.
4. Click **OK**.

Configuring the Follow Me setting

When you configure the Follow Me setting, you redirect your incoming calls to multiple phone numbers in a sequence. You also configure the ring duration of each phone number and the call sequence of those phone numbers.

After completing the Follow Me configuration, you can use this configuration in Managing a call on page 23.

If you configure both Call Forward and Follow Me settings, Call Forward takes precedence.

To configure follow me

1. Go to **Call Handling**.
2. Under **Follow Me Setting**, click **New**.
3. Enter a **Name**.
4. Under **Follow Me Numbers**, click **New** to enter a phone number to which the call to your extension can be transferred.
   Additionally, define the **Ring duration** in seconds. This setting defines how long to ring the Follow Me number before following the No Answer call handling setting of the extension. Click **OK**.
5. Click **OK**.
   If you want to transfer a follow me call to multiple phone numbers in a sequence, repeat the steps to add more numbers. You can add up to six phone numbers. The phone numbers will be dialed according to the sequence in the follow me setting.
6. To save **Call Handling** changes, click **OK**.
7. You can use the Follow Me configuration in Managing a call on page 23.

Configuring the Twinning setting

This option is only available if the FortiVoice system administrator has selected Twinning in a profile under Phone System > Profile > User Privilege and applied that user privilege profile to your extension.

With twinning, you allow an external telephone (cell phone or home phone) to replicate your internal office extension.

1. Go to **Call Handling**.
2. Under **Twinning Setting**, select one of the following choices:
   - **Disabled**: Select to disable twinning.
   - **Simple**: Select to configure basic twinning by adding a phone number.
   - **Scheduled**: Select to configure twinning by adding phone numbers based on a schedule or multiple schedules (three maximum).
3. Click **OK**.

Customizing a sound file for an announcement

When configuring user-defined **Call Process** settings under **Call Handling**, you have the option to set the **Action** to **Play announcement.** You must then assign a sound file to play, or create one.

For more details about the call process configuration, see Call handling on page 23.

If you want to upload a sound file, make sure that the file meet the following requirements:

- WAVE (.wav) format
- 8 bit, 8 kHz, mono

To customize a sound file

1. Go to either **Call Handling > User's call handling** or **Call Handling > Quick call handling**.
   Note that **Quick call handling** is used to determine the call process for when your status is either **Out of office** or **Away**, or for another reason (**Other**).
2. In **Call Process**, click **New**.
3. Assign a **Schedule** as necessary, and determine whether this call process applies to **Internal**, **External**, and/or **Office peer** calls.
4. Set **Action** to **Play announcement**.
   A **Sound file** drop-down menu appears.
5. Click **New** (the plus **+** icon) next to the drop-down menu.
6. Enter a **Name** for the sound file.
7. To record your own announcement:
   a. Set **Action** to **Call me**.
      A message appears stating that a voice recording request (or call) has been sent to your extension.
   b. Answer the call and record your announcement using the phone. Click **Yes** when you have finished recording your announcement.
   c. Click **Close**.
8. To import a preexisting audio file:
   a. Set **Action** to **Upload**.
   b. Locate and select the WAVE file.
   c. Click **Open**.
   d. Click **Close**.
9. To finish the call process configuration, click **OK**.

Call recording

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

FortiVoice allows you to record phone calls to have a permanent record of particularly important phone calls.

FortiVoice supports two types of recordings:

- **Personal recording**: You can access your phone call recordings from the FortiVoice user portal.
- **System recording**: With the administrator privilege, you can access phone call recordings from the FortiVoice web-based manager. For more details about this recording type, see the Call recording section in the FortiVoice Cookbook.

This section includes the following topics:

- Recording a phone call on page 28
- Managing recorded calls on page 28

Recording a phone call

Before recording a phone call, have the agreement of the person you are talking with or check your local laws regarding phone recording.

Before you begin

To record a phone call: Make sure that the FortiVoice system administrator applies a user privilege, with the monitor/recording, personal recording option enabled, to your extension.

Procedure steps

1. During a phone call, start the personal recording by pressing *30.
2. To pause the personal recording, press *31. To resume the recording, press *30 again.
   The recording continues until you hang up.

Managing recorded calls

In addition to listening to a recorded call, you can remove, forward, or save a recorded call.

Before you begin

- **To access a phone call recording**: Make sure that the FortiVoice system administrator applies a user privilege, with the user portal, call recording option enabled, to your extension.

Procedure steps

1. Go to **Call Recording**.
2. Select a recorded call.
3. Perform one of the following actions:
   - To listen to the recorded phone call, click ▶.
   - To remove the recorded phone call, click **Delete.** To confirm the deletion, click **Yes.**
   - To send the recorded phone call to another extension, click **Forward.** Select the extension and click **OK.**

     When you download multiple recorded phone calls at the same time, they are saved in the TGZ file format. To decompress and extract the recorded phone calls from this file, use a third-party tool that supports the TGZ file format.

   - To save the recorded phone call (WAV file format), click **Download**. Select to save the file and click **OK**.

Fax

The **Fax** menu allows you to send and receive faxes. If your administrator enables you to monitor a fax extension, you can also manage all of the faxes received on that fax extension.

This section includes the following topics:

- Viewing a fax received on your extension on page 30
- Sending a fax on page 30
- Viewing a fax sent from your extension on page 31
- Adding a fax cover page on page 31
- Monitoring a fax extension on page 31

Viewing a fax received on your extension

1. Go to **Fax > Inbox**.
2. Locate the row for the fax that you want to view.
3. Go to the **Download** column and click the link.

Sending a fax

1. Go to **Fax > Sent** or **Fax > Inbox**.
2. Click **New**.
3. Configure the following fields:

GUI field	Description
To	Enter the fax number to which you want to send the fax.
Attach cover sheet	Select a cover sheet. For details, see Adding a fax cover page on page 31.
Attachment (PDF and JPEG only)	Click the plus (**+**) icon to locate the fax that you want to send as either a PDF or JPEG attachment.
Advanced	
Fax header	Enter the fax header such as the receiver's name, subject, or number of pages.
Station ID	Enter a station ID that shows on each fax sent from the FortiVoice unit.

4. Click **Send**.

Viewing a fax sent from your extension

1. Go to **Fax > Sent**.
2. Locate the row for the fax that you want to view.
3. Go to the **Download** column and click the link.

Adding a fax cover page

Requirements for the fax cover page are:

- Supported file types: JPEG, PDF, and PNG
  - If you want to use a PDF file as a fax cover page, make sure that the file is one page only.
- File size: 200 MB or less

1. Go to **Fax > Cover Page**.
2. Click **New**.
3. Add a **Name**.
4. Optionally, add a **Description**.
5. Click **Upload**.
6. Locate and select the file.
7. Click **Open**.
8. Click **OK**.

Monitoring 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. In **eFax Account**, select the fax receiving account.
3. Locate the row of the fax that you want to view, delete, resend, or forward.
4. To view a fax, go to the **Download** column and click the link.
5. To delete the fax, select the checkbox at the beginning of that row and click **Delete**.
6. To resend the fax, select the checkbox at the beginning of that row and click **Resend**.
7. To forward the fax, select the checkbox at the beginning of that row and click **Forward**.

Conference

You can add a conference call event in your calendar and invite attendees by email.

To have access to **Conference**, the FortiVoice system administrator must update the FortiVoice phone system to give you the privilege to organize conference calls by adding your extension in Call Feature > Conferencing > User Conferencing.

FortiVoice allows two types of conferencing:

- **User conferencing**: You can set up conferences using the FortiVoice user portal.
- **Admin conferencing**: The administrator can set up conferences using the FortiVoice web-based manager. For details, see the FortiVoice Phone System Administration Guide.

This section includes the following topics:

Specifications for conference call events

User conference call events include the following specifications:

- **Attendee limit**: The maximum number of participants that can join a conference call event.
- **Concurrent event limit**: The maximum number of conference call events that you can simultaneously host.
- **Event duration**: There is no limit as to how long a conference call event can last.

The following table lists specifications for user conference call events.

FortiVoice model	Attendee limit	Concurrent event limit
FVE-VM100 / FVE-100E	8	3
FVE-VM200/FVE-200F	8	3
FVE-300E	8	3
FVE-VM500 / FVE-500E / FVE-500F	20	3
FVE-VM1000 / FVE-1000E	20	5
FVE-VM2000 / FVE-2000E / FVE-2000F	20	5
FVE-VM3000 / FVE-3000E	20	8
FVE-VM5000 / FVE-VM5000F	20	10

FortiVoice model	Attendee limit	Concurrent event limit
FVE-VM10000	20	20
FVE-VM20000	20	20
FVE-VM50000	20	20

Adding a conference call event

1. Go to **Conference**.
2. In the calendar, click a date.
3. Complete the following fields:

GUI field	Description
Title	Add a title for the conference call event. This field is mandatory.
Conference ID	The ID associated with the conference call. The FortiVoice system administrator defines this ID. This field is read-only.
Attendee PIN	The PIN that an attendee must enter to join the conference call. You can use the one generated by the system or change it.
Organizer PIN	The PIN that you must enter to host a conference call. Use the suggested PIN or specify your own code.
Description	Optionally, add details about this conference call event.
Location	Optionally, add information about the location of this conference call event.
Start time	Both start and end times use the time zone setting available in Preferences > Display Preference. Select the time for the conference call event to start. If the event will last all day, do not select a start time but enable **All day event** below.
End time	Select the time for the conference call event to end. If the event will last all day, do not select an end time but enable **All day event** below.
All day event	Enable if the duration of the conference call will be an entire day.
Recurrence	If you want the conference call event to be on a repeating schedule, click **None**, update the recurrence settings, and click **OK**.

GUI field	Description
Attendee	For details about the attendee limit for user conferencing, se e Specifications for conference call events on page 32. **1.** Click **Add Attendee**. **2.** Add an email and a display name, and click **Create**. **3.** Repeat for every attendee.

4. To save the conference call event, click **OK**.

Example of an email received by an invited attendee

Juliet [redacted] has invited you to a Conference Call - Marketing meeting	
Subject:	Marketing meeting
Organizer:	Juliet [redacted] - [redacted] @gmail.com'
When:	Thu Jun 04 2020 06:30
Location:	Ottawa
Conference ID:	903903
Conference PIN:	193311
Access:	Please dial ext 7501 to attend this conference.
Attendees:	Nathalie - [redacted] @fortinet.com'
Description:	New phone models

Attending? Accept - Tentative - Reject

Adding a conference announcement

You can add a conference announcement to personalize the greeting that all attendees will hear after they enter the conference ID to join your conference call event.

To add a conference announcement

1. Go to **Conference**.
2. Click **Conferencing Options**.
3. You have two options:
   - Option 1: To initiate the creation of an announcement:
     i. Click **Call me.**
     ii. Answer your extension.
     iii. Follow the prompts to record the announcement.

- Option 2: To use an announcement that you have already recorded:
    - **i.** Verify that the file meets the following requirements:
        - Format: WAV
        - Channel: Mono
        - Bit rate: 8000 Hz (8 kHz)
        - Sampling: 16-bit PCM
    - **ii.** Click Upload.
    - **iii.** Follow the prompts to upload the file.

4. To save the changes, click **OK**.

Reminder

The **Reminder** menu allows you to add a reminder event in your calendar and set the extensions to which you want to send the event reminder calls.

To add a calendar reminder

1. Go to **Reminder**.
2. In the calendar, click a date.
3. Complete the following fields:

GUI field	Description
Title	Add a name for the reminder event.
Description	Optionally, add a description for the reminder event.
Location	Optionally, add a location for the reminder event.
Start time	The start time uses the time zone setting available in Preferences > Display Preference. Specify when the reminder event starts.
Recurrence	If you want the reminder event to be on a repeating schedule, click **None**, update the settings, and click **OK**.
Guest	Select the internal and external phone numbers to which you want to send the event reminder call.
Reminder audio	To send a reminder audio to the selected guest phones, select one of the following options: • **Default**: Select to send a beep sound as the reminder audio. To hear the beep sound, click **Play**, and save the GSM file. • **Customized**: Select to customize the reminder audio. a. Click **Create New**. b. You have two options to create a customized message: • Option 1: Select an extension and click **Call me**. You can then follow the prompts to create a new message. • Option 2: To upload a message that you have already recorded: • Make sure that the file meets the following requirements: 8 bit, 8 kHz, mono, and WAV file format. • Click **Upload**. c. Click **Close**.

4. To save the reminder event, click **OK**.

Device

The **Device** menu allows you to set programmable keys on your FortiFone phone and perform other tasks for the FortiFone softclient.

The FortiVoice user portal only shows the **Programmable Key** menu, if you are using a FortiFone phone that supports programmable keys.

This section includes the following topics:

Customizing desk phone programmable keys

The FortiVoice user portal only shows the **Programmable Key** menu, if you are using a FortiFone device that supports programmable keys.

The **Programmable Key** menu allows you to program phone keys for specific functions and easier call control.

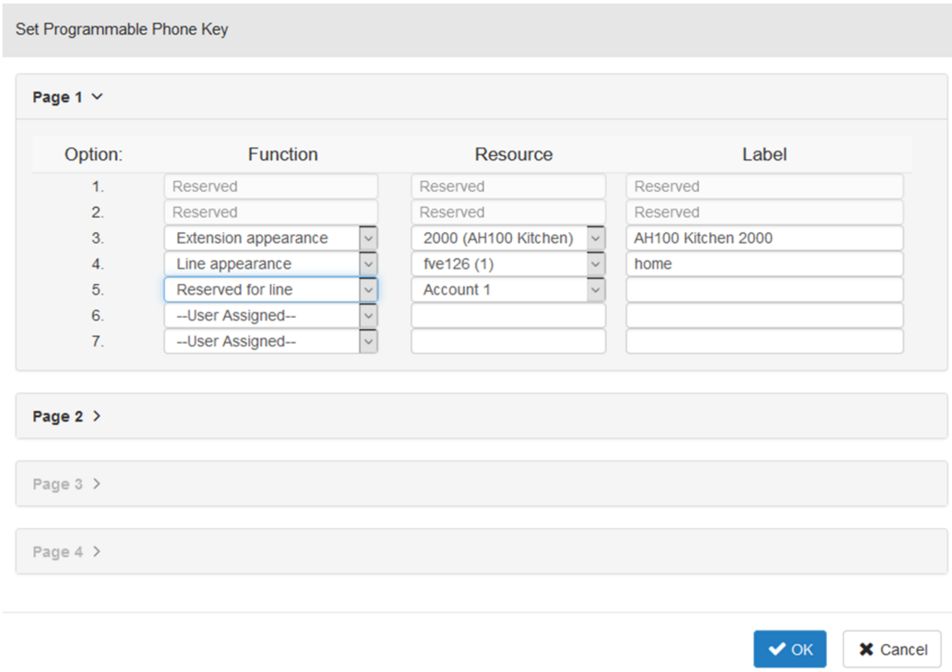
Your FortiVoice system administrator can define keys as admin-assigned (Phone System > Profile > Programmable Keys). You cannot customize these keys. However, your FortiVoice system administrator can also define other keys as user-assigned, allowing you to program them yourself from the user portal.

Keys 1 and 2 are reserved by default and you cannot edit them. Your FortiVoice system administrator may choose to reserve up to the first four lines.

To customize programmable keys

1. Go to **Device > Programmable Key**.
   In the list, you can see which keys are reserved, admin-assigned, and user-assigned.

   In the following example, the user has one **Page** of keys. Lines 1 and 2 are designated as **Reserved**. The remaining keys are designated as **User Assigned.** If necessary, contact your administrator to get more user assigned keys, which would then be configured under **Page 2** and **Page 3**.



2. For each **User Assigned** key that you want to add, complete the following fields. For more details about each key, see :
   - In **Function**, select the type of action to occur when you press the programmable key.
   - In **Resource**, select the result of the selected function, if applicable.
   - In **Label**, keep the default or enter a name that will appear beside the programmable key on the FortiFone device.
3. Click **OK**.

Programmable key descriptions

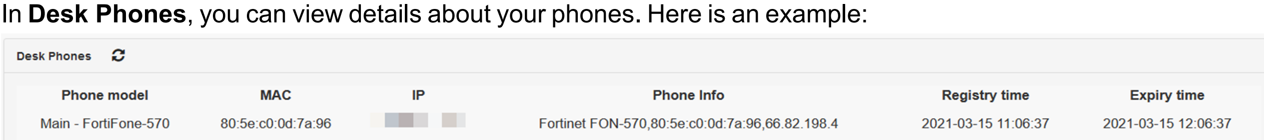
Function	Description	Resource	Label
Call forward	Allows you to enable or disable and configure the call forward function.	Stays blank.	Edit the label or keep the default label (Call forward).
DTMF	When you are on a call and you press the DTMF key, the system dials the configured DTMF digits. This key is useful when you need to enter consistent codes at an interactive voice response (IVR) system.	Enter the DTMF digits to dial when you press this programmable key on your phone.	Edit the label or keep the default label (DTMF).
	The DTMF function is only available during a call.		

Function	Description	Resource	Label
Extension appearance	Allows you to quickly monitor the selected extension.	Select an extension from the list.	Edit the label or keep the one associated with the selected extension.
Intercom	Allows you to use the phone speaker of a local extension as an intercom.	Stays blank.	Edit the label or keep the default label (Intercom).
	The intercom function works for internal extensions (not for external extensions).		
Line appearance	Allows you to monitor the status of a line (available, busy, or on hold).	Select a line.	Edit the label or keep the one associated with the selected line (or trunk).
Park	Places the call into the first available call park slot. You will hear a prompt telling you which slot the call has been parked in.	Stays blank.	Edit the label or keep the default label (Auto park).
	The FortiVoice system administrator configures the call parking settings (park call number, park line start, and park line end).		
Park appearance	Monitors the selected call park slots, informing you if there is a call parked.	Select the park slot to monitor.	Edit the label or keep the one associated with the selected line (or slot).
Record	Allows you to record a phone call.	Stays blank.	Stays blank to use the Record label.
	The record function is only available if the FortiVoice system administrator has applied a profile with personal recording enabled to your extension.		
Reserved for line	By default, the FortiVoice phone system reserves the first two programmable keys for lines on the phone so you can monitor your own calls on those lines. If your phone has additional lines, then you can use the Reserved for line function to program the appearance of those lines.	If multiple accounts have been configured on this extension, choose which account to monitor.	Edit the label or keep the one associated with the selected line (or account).

<table>
<tr><th>Function</th><th>Description</th><th>Resource</th><th>Label</th></tr>
<tr><td rowspan="2">System speed dial</td><td>Allows you to quickly place a call to the selected extension or phone number at a touch of a button.</td><td>Make a selection.</td><td>Edit the label or keep the one assigned by the FortiVoice system administrator.</td></tr>
<tr><td colspan="3">Before using the system speed dial key, the FortiVoice system administrator must configure the speed dial numbers on the system.</td></tr>
<tr><td rowspan="2">Twinning</td><td>Allows an external phone to ring along with your office phone, so you can answer the call at either phone.
Pressing the twinning programmable key enables or disables the function.</td><td>Stays blank.</td><td>Edit the label or keep the default label (Twinning).</td></tr>
<tr><td colspan="3">Before using the twinning function, make sure that:
• The FortiVoice system administrator has applied a profile (with twinning enabled) to your extension.
• Configure the twinning function (Preferences > Twinning) in the FortiVoice user portal.</td></tr>
<tr><td rowspan="2">User speed dial</td><td>Allows you to quickly place a call to the selected extension or phone number at a touch of a button.</td><td>Select a contact from your speed dial list.</td><td>Edit the label or keep the one associated with the selected contact.</td></tr>
<tr><td colspan="3">The user speed dial function shows personal contact choices that you have configured on the FortiVoice user portal. For details, see Updating a speed dial list of personal contacts.</td></tr>
</table>

Displaying desk phone details

1. Go to **Device**.
2. In **Desk Phones**, you can view details about your phones. Here is an example:

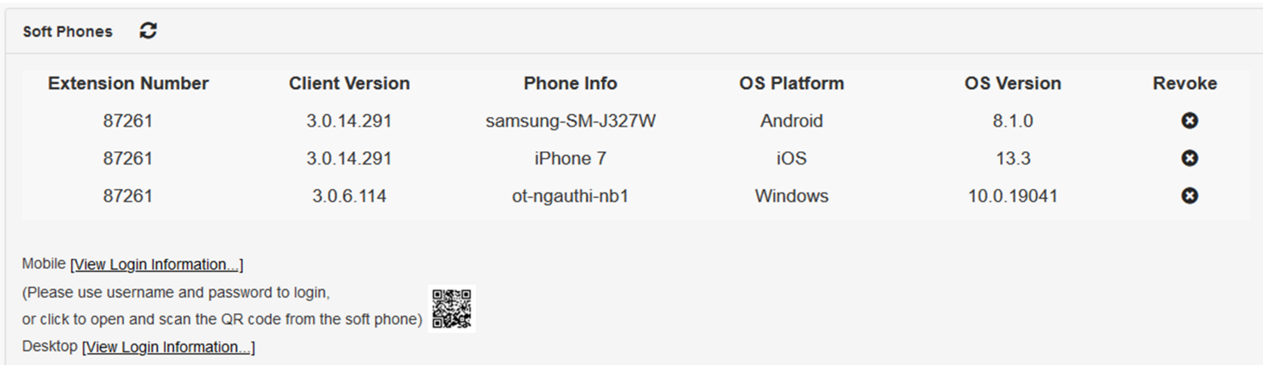


Desk Phones

Phone model	MAC	IP	Phone Info	Registry time	Expiry time
Main - FortiFone-570	80:5e:c0:0d:7a:96	[illegible]	Fortinet FON-570,80:5e:c0:0d:7a:96,66.82.198.4	2021-03-15 11:06:37	2021-03-15 12:06:37

Displaying FortiFone softclient details

1. Go to **Device**.
2. In **Soft Phones**, you can view details about your FortiFone softclient. Here is an example:


Soft Phones

Extension Number	Client Version	Phone Info	OS Platform	OS Version	Revoke
87261	3.0.14.291	samsung-SM-J327W	Android	8.1.0	
87261	3.0.14.291	iPhone 7	iOS	13.3	
87261	3.0.6.114	ot-ngauthi-nb1	Windows	10.0.19041	

Mobile [View Login Information...]
(Please use username and password to login,
or click to open and scan the QR code from the soft phone)
Desktop [View Login Information...]

Displaying the softclient QR code for scanning

The FortiFone sofclient (Android or iOS) installation requires that you display the softclient quick response (QR) code on your PC screen for scanning.

For more details about installing, configuring, and using the FortiFone softclient, see the FortiFone Softclient User Guide for Android or iOS, as applicable.

1. Go to **Device**.
2. In **Soft Phones**, click the QR code.
3. When the FortiFone softclient on your mobile device is ready to scan the QR code, point your mobile camera at the PC screen displaying the QR code.
4. When you are done with the QR code, click **Close**.

Revoking a FortiFone softclient license

You can revoke a license for a device that you no longer want associated with your extension and managed by the FortiFone softclient.

1. Go to **Device**.
2. In **Soft Phones**, locate the softclient license that you want to remove, go to the **Revoke** column, and click .
3. To confirm, click **Delete**.

Preferences

The **Preferences** menu allows you to customize settings for your extension and the FortiVoice user portal.

This section includes the following topics:

- Customizing user settings on page 42
- Customizing display preferences on page 43
- Customizing desk phone programmable keys on page 37
- Customizing incoming calls preferences on page 44
- Customizing quick modes on page 44
- Customizing notification options on page 45

Customizing user settings

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

GUI field	Description
User Setting	
Number	Displays your extension number (read-only).
Display name	Displays the caller ID on the extension, usually the name of the extension user (read-only).
Emergency caller ID	Displays the caller ID to display on the destination phone when the emergency number is dialed (read-only).
External caller ID	Displays a particular caller ID on a called phone instead of the FortiVoice main number or the trunk phone number (read-only). Use the `name<phone_number>` format, such as `jdoe<2221111234>`. If you are unsure about this feature, contact your administrator for more information.
Idle timeout	Enter the duration of time in minutes before you are logged out of the user portal. Set the value between **1** and **1440** minutes (maximum of one day).
Picture ID	You can upload a picture ID file. When you place a call, the callee's phone displays the uploaded picture ID, if the phone model supports this feature. Before uploading a picture file, make sure that the file meets the following requirements: • Supported formats: JPEG and PNG • Width and height ratio: between 0.85 and 1.2 • File size: 5 MB or less To upload a picture, click .

GUI field	Description
	To delete a picture, click .
Change PIN number	Click to enter and confirm a new PIN for accessing your voicemail. You must enter your current PIN before choosing a new PIN.
Change User Password	If you use *LDAP* as the authentication mode, this link is unavailable. Click to enter and confirm a new user password for accessing the user portal. You must enter your current password before choosing a new password.

3. To saves changes, click **OK**.

Customizing display preferences

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

GUI field	Description
Display Preference	
Default portal	Set the default portal to open when you log in: **User portal** (by default), **Operator console**, or **Call center console**. For more information about the different consoles, see Call center console on page 49 and Operator console on page 46.
Phone language	Set the phone language for the extension.
Web language	Set the user portal language (**English** by default).
Theme	Set the display color theme for the user portal (**Green** by default).
Time zone	Set the time zone for the user portal (**GMT -8:00 Pacific Time US & Canada** by default).

3. To saves changes, click **OK**.

Customizing incoming calls preferences

1. Go to **Preferences**.
2. In **Incoming Calls**, you can configure the following settings:

GUI field	Description
Retain original caller ID	Enable to display the original caller's number of an incoming call.
Call screening	Enable to request callers to state who they are and why there are calling when receiving an incoming call, allowing you to safely answer expected calls or cancel unwanted and spam calls.
Record caller name	Enable to record the names of incoming callers.
Ring duration	Specify the duration of time in seconds that incoming calls will ring for before going to voicemail.
Call waiting	Enable to allow you to answer an incoming call while on another call.

3. To save changes, click **OK**.

Customizing quick modes

1. Go to **Preferences**.
2. In **Quick Mode**, configure the following fields:

GUI field	Description
Quick Mode	
Effective mode	With this temporary setting, you configure a secondary set of call handling rules that do not affect your regular call handling settings. You can configure this setting so calls can automatically follow regular call handling. Use this section to define convenient quick mode schedule settings. Click any of the three modes to define their respective option (and time duration or time of day, if applicable): • To cancel quick mode and revert the system to its regular schedule, dial *720. • To enable the **Out of office** schedule, dial *721. • To enable the **Away** schedule, dial *722. • To enable the **Other** schedule, dial *723. If one or more modes are not showing in the list, then the FortiVoice system administrator did not define them on the FortiVoice phone system.

3. When you have finished customizing your preferences, click **OK**.

Customizing notification options

1. Go to **Preferences**.
2. In **Notifications Options**, configure the following fields:

GUI field	Description
Notification Options	
Voicemail	Select the email notification option to use when this extension receives a voicemail: • **None**: Do not send a notification. • **Simple**: Send an email notification. • **With attachment**: Send an email notification with the voicemail attached.
Fax	Select the type of email notification option to use when this extension receives a fax: • **None**: Do not send a notification. • **Simple**: Send an email notification. • **With attachment**: Send an email notification with the fax attached.
Missed call	Enable to send an email notification when you miss an incoming call.
Email address	Enter the email address(es) to which you would like email notifications for voicemails, faxes, and missed calls to be sent.

3. To save changes, click **OK**.

Operator console

To have access to the **Operator console**, the FortiVoice system administrator must assign the operator role (Phone System > Profile > User Privilege > Operator Role) to your extension.

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.

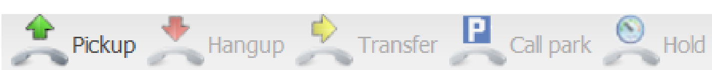
This section includes the following topics:

Opening the operator console

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

Managing active calls

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



- 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 the 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:

- Right-click an extension from the **Directory** widget and click **Call**.
- Click **Call** Call 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.
2. The call appears in the **Parked Call** widget of the operator console.
3. In the list of the **Parked Call** widget, one of the users of the operator console can then select the call, and click **Unpark**. The phone of that operator console user rings with the parked call.
4. To refresh the list of parked call, 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 of your extension with the Operator Role - Hotel room active.

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

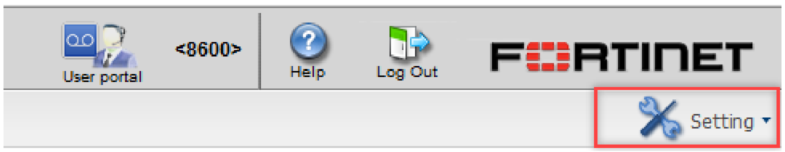
The Room Status widget uses dots with the following colors:

- Red - Shows that the status is disabled.
- Green - Shows that the status is enabled.

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. Go to **Add Content > Room Status**.

Editing the room settings

1. Go to the row of the room that you want to edit.
2. In the first column, select the check box.
3. Click **Edit**.
4. Edit the settings, as required.
5. Click **OK**.

Setting up or editing a wake up call

1. Go to the row for the room that wants a wake up call.
2. In the **Wake Up** column, click wake up .
3. To create a new wake up call, click **New**.
   To edit a wake up call, locate and expand the date in the Agenda list, and click on the wake up entry.
4. Edit the fields, as required.
5. Click **Create** or **OK**, as applicable.

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:

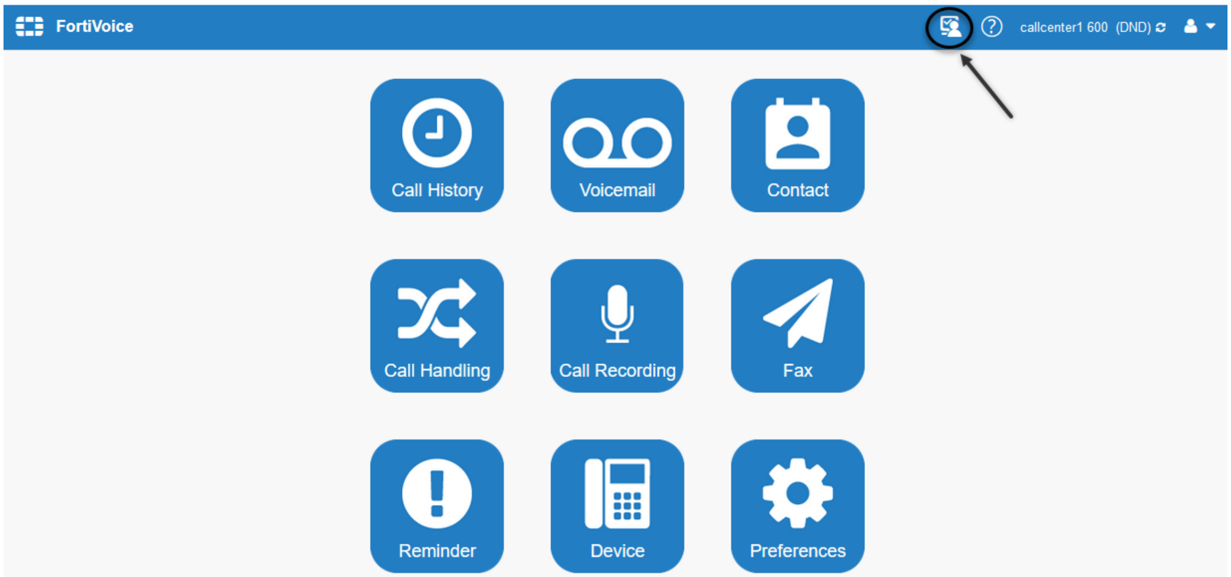
- Pick up a waiting call.
- Transfer a waiting call to an extension.
- Adjust caller priorities in a queue.
- Pause and resume your agent status with reason codes.
- Manage agents (coach, listen, log in, log out, and pause and resume agent statuses with reason codes).
- Initiate a callback.
- Monitor 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.

To set up and generate call center reports, you need to access the FortiVoice phone system. For more details, see the Configuring call center report profiles and generating reports section in the FortiVoice Phone System Administration Guide.

This section includes the following topics:

Logging in to the call center console

1. 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**:
     i. Ask your FortiVoice system administrator for the IP address or FQDN (and access port, if required) of the FortiVoice phone system that is managing your extension.
     ii. Know your phone extension on the FortiVoice phone system and user password for web access.
     iii. 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`
     iv. Enter your extension and password.
     v. Click **Login**.
2. You are now ready to go to Logging in to queues on page 50.

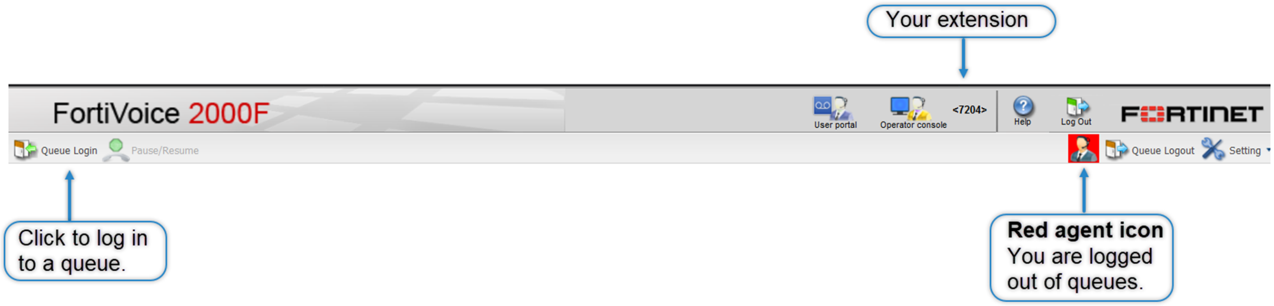
Logging in to queues

After logging in to the call center console, you need to log in to queues to take calls.

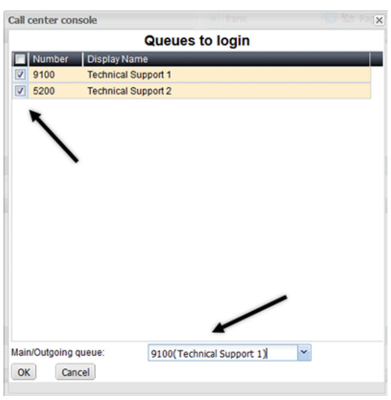
To log in to queues

1. Click 

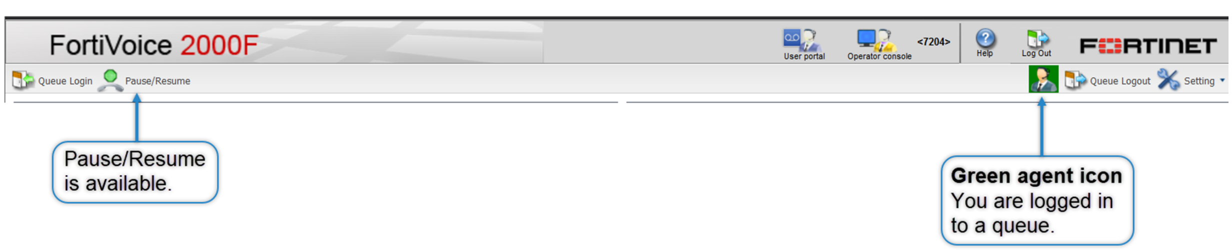
.



2. Select one or more queue from the list.
3. 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.
   - Depending on the queue status, the **Agent** icon can be green or yellow. For more details about the queue status, see Checking the queue status on page 52.



Checking the queue status

The color of the **Agent** icon gives you an indication of the queue status.

To understand the queue status

The following table lists the **Agent** icon colors and their descriptions:

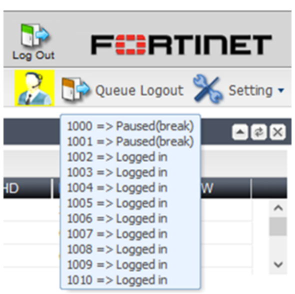
Agent icon	Description
	Indicates that you are logged in to all the queues that you are a member of. You are ready to take calls

	• Indicates one of the following conditions:
	  • The status of one or more of your queues is set to *Pause*.
	  • If you are a member of multiple queues, you are logged in to at least one queue out of all the queues but not all of them.
	• Indicates that the extension is *in use*.

	Indicates that you are logged out of queues.

To display the queue list and status

1. Hover over the Agent icon.
   The UI displays a queue list with status.



Taking a pause from queues

Take a pause from answering calls in queues without logging out of queues by assigning a pause reason code. Let's say that you initially assign *Lunch break* as the reason code but you will be attending a meeting immediately after lunch. The call center console allows you to reset the reason code to *Meeting* and extend your pause from answering calls in queues.

To assign a reason code

1. Click **Pause/Resume**.

2. Click **Pause**.
3. Select queues.
4. Select a **Reason code**.
5. Click **OK**.

To reset a reason code

You can stay on pause from taking calls but you change the assigned reason code.

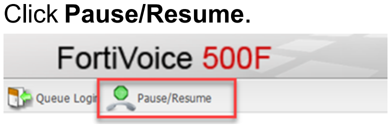
1. Click **Pause/Resume**.

2. Click **Reset Reason Code**.
3. Select a new **Reason code**.
4. Click **OK**.

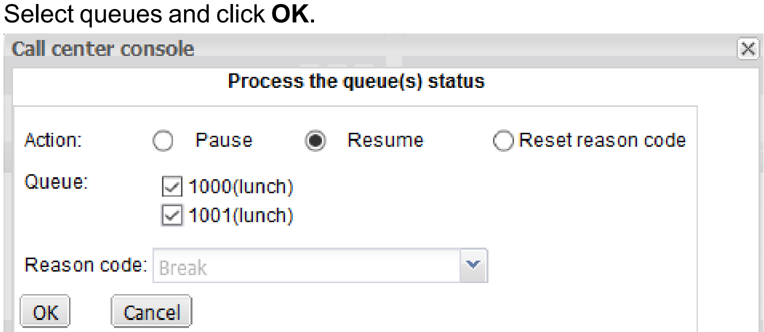
Resuming taking calls from queues

End your pause from queues and start answering calls again.

1. Click **Pause/Resume**.



2. Click **Resume**.
3. Select queues and click **OK**.

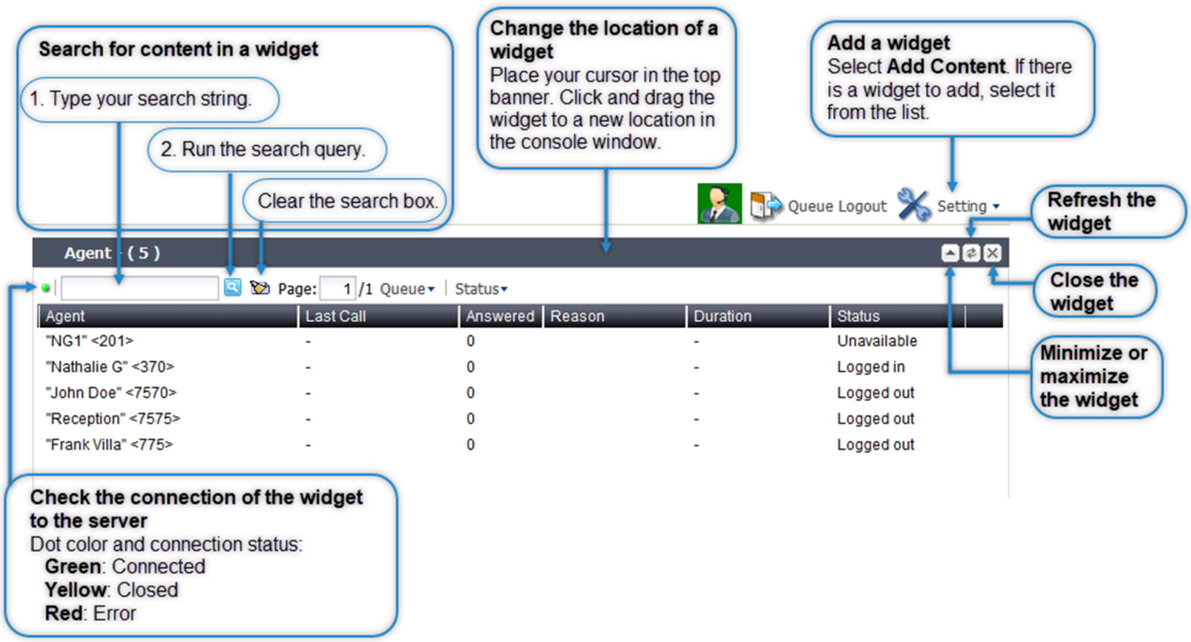


You are ready to take calls from queues.

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 54
- Active Call on page 55
- Recent Calls on page 58
- Directory on page 60
- Agent on page 61
- Queue Stat Today on page 64
- Queue Agent Summary on page 65
- Queue Callback List on page 66

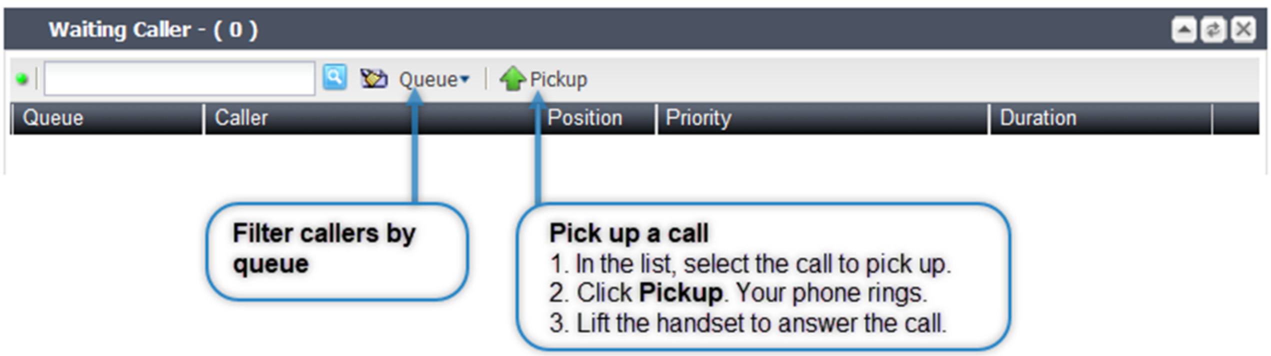
Waiting Caller

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

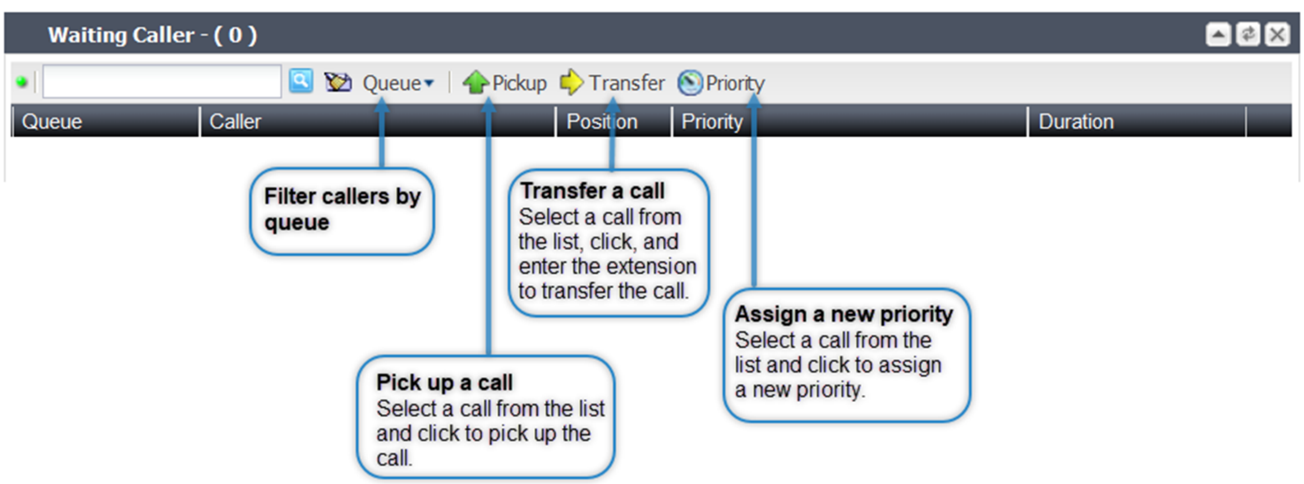
Depending on your profile, the **Waiting Caller** widget allows you to perform the following tasks:

- 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)



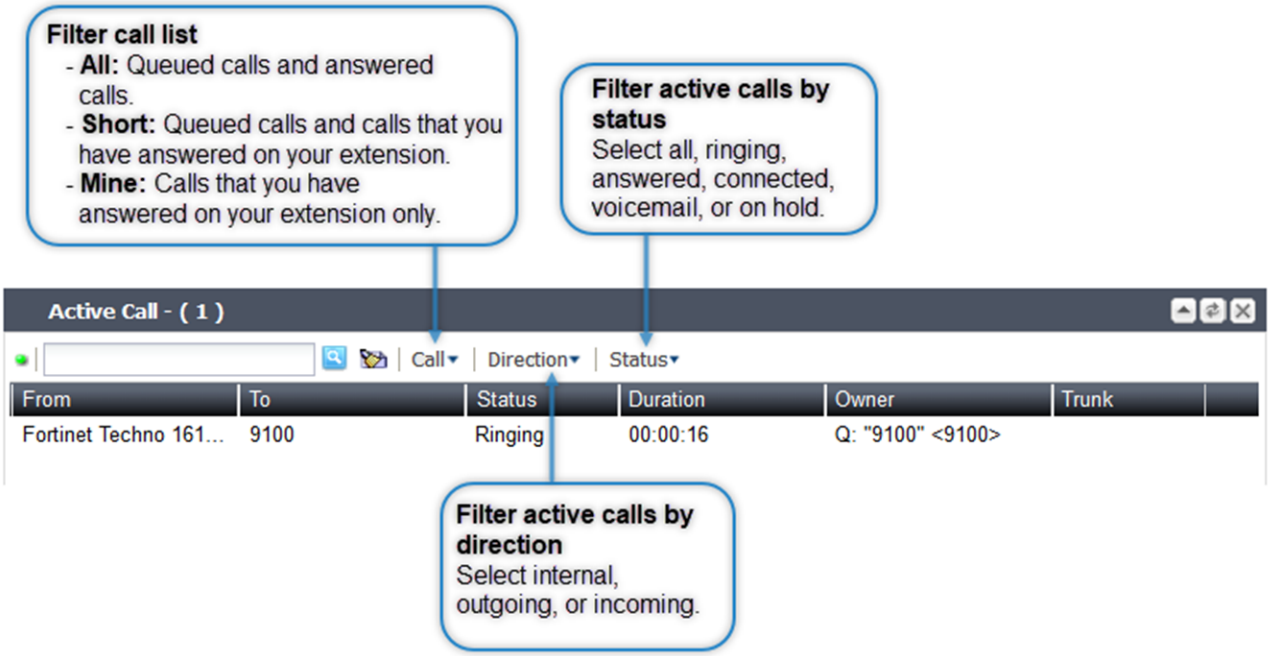
Waiting Caller (manager profile view)



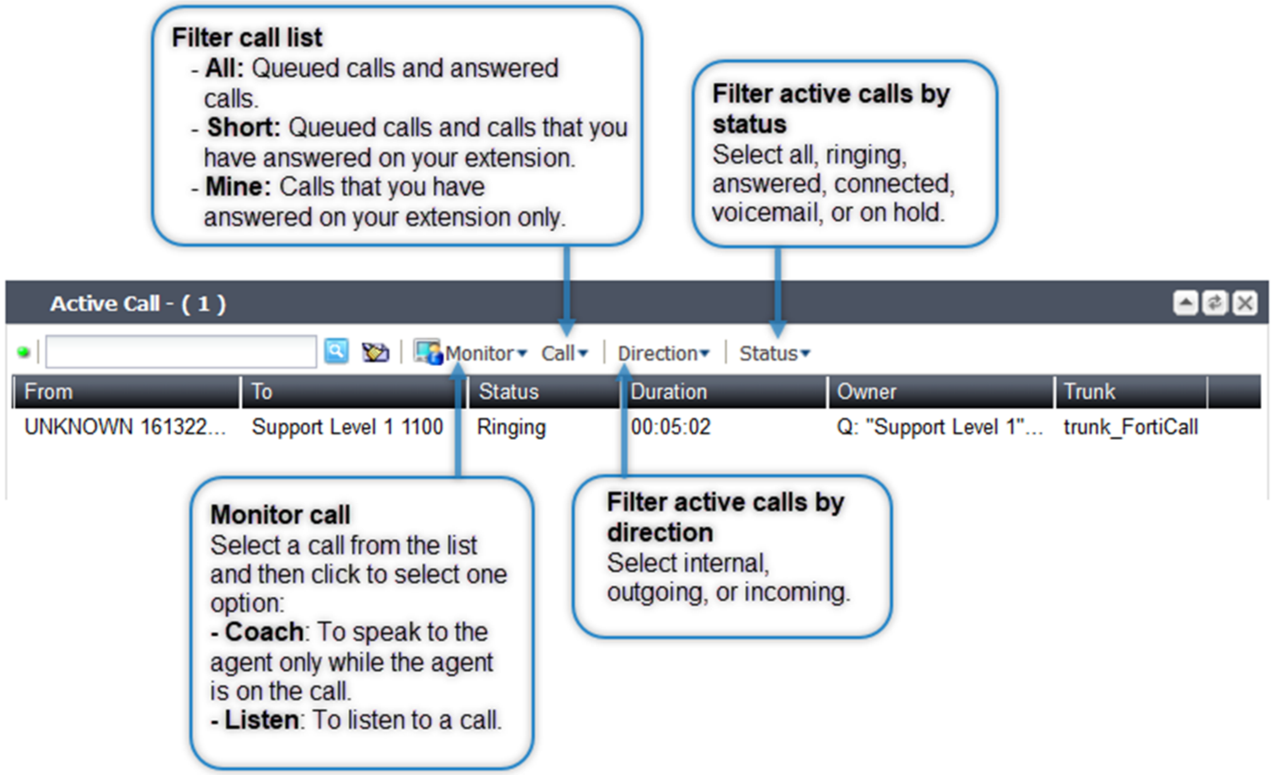
Active Call

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

Active Call (agent profile view)



Active Call (manager profile view)



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:

Assigning a classification label to a call

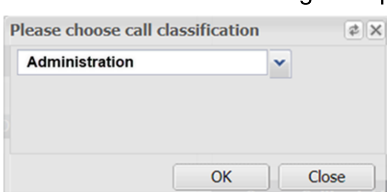
Agents can assign a classification label to a call. Managers can generate call reports using those classifications.

To get access to the classification labels, the FortiVoice system administrator must complete the following changes on the FortiVoice phone system:

- Update the call queue additional setting to add call classification labels.
- Update the agent or manager profile to enable the **Set call classification** option.

To assign a classification label to a call

1. Answer a call from a queue.
2. When the call is complete, hang up.
   The call classification dialog box appears. Here is an example:

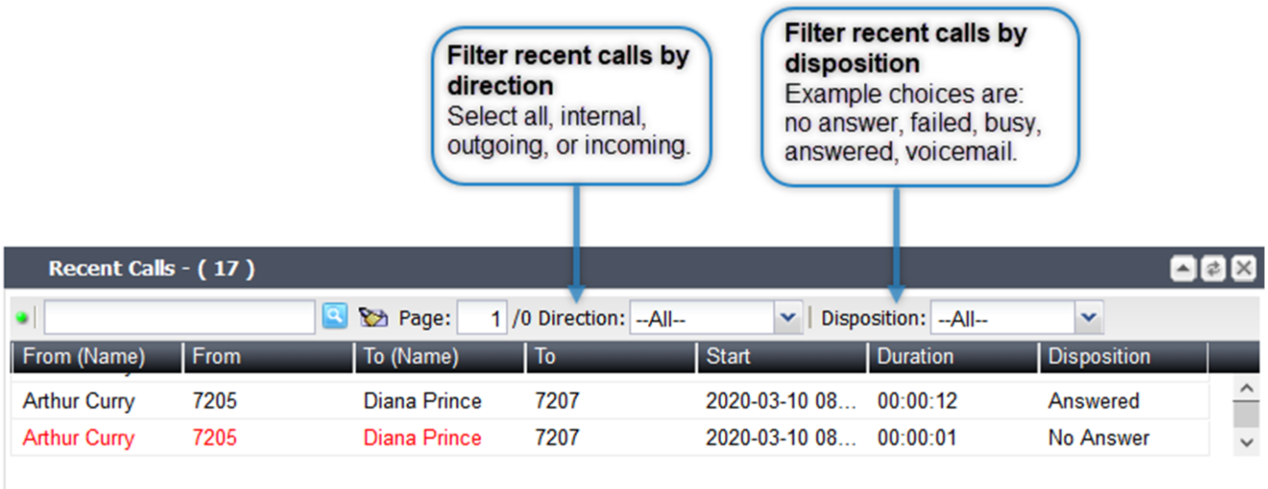


3. Select a label from the list.
4. Click **OK**.

Recent Calls

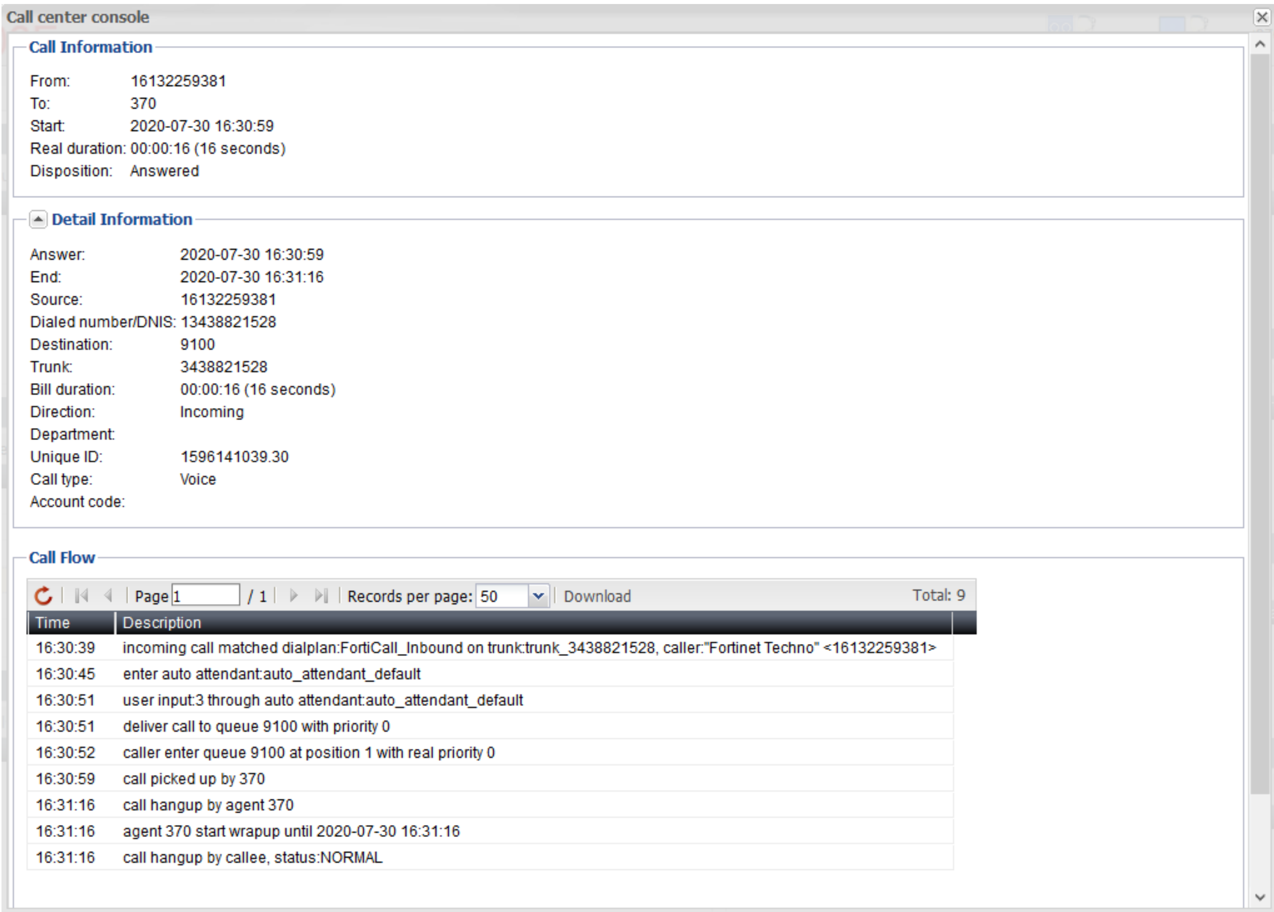
The **Recent Calls** widget shows a history of recent phone calls.

Recent Calls (agent and manager profiles view)



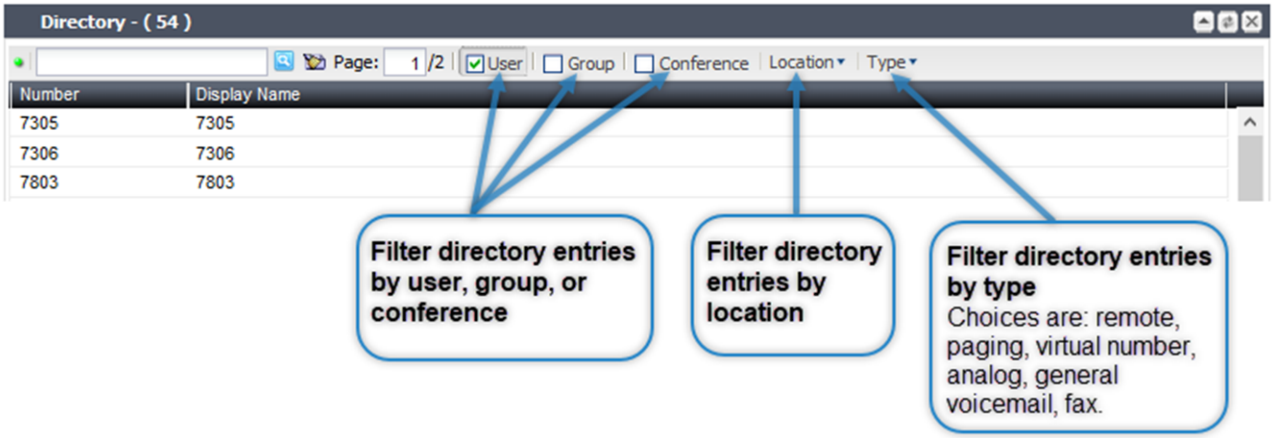
Viewing recent call details

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:



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.

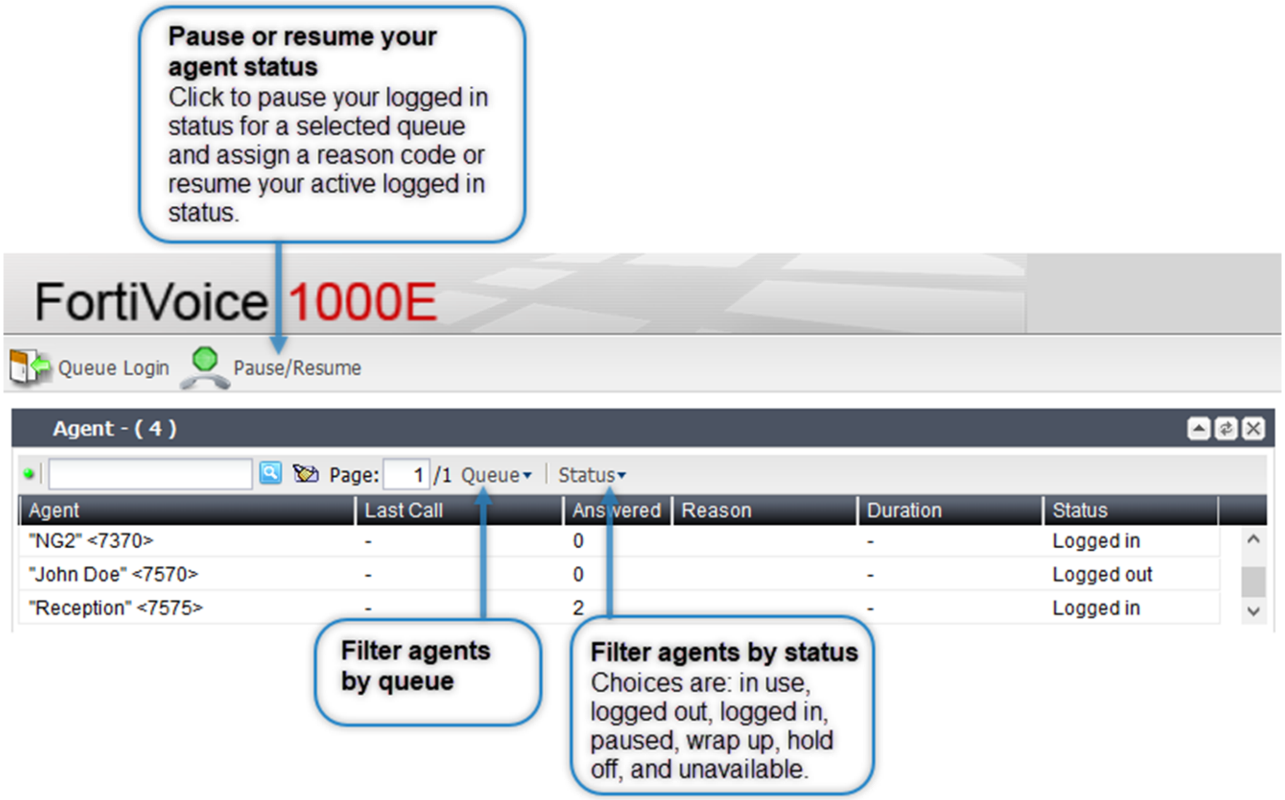
With the manager profile, you can perform the following additional tasks in the **Agent** widget:

- 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.

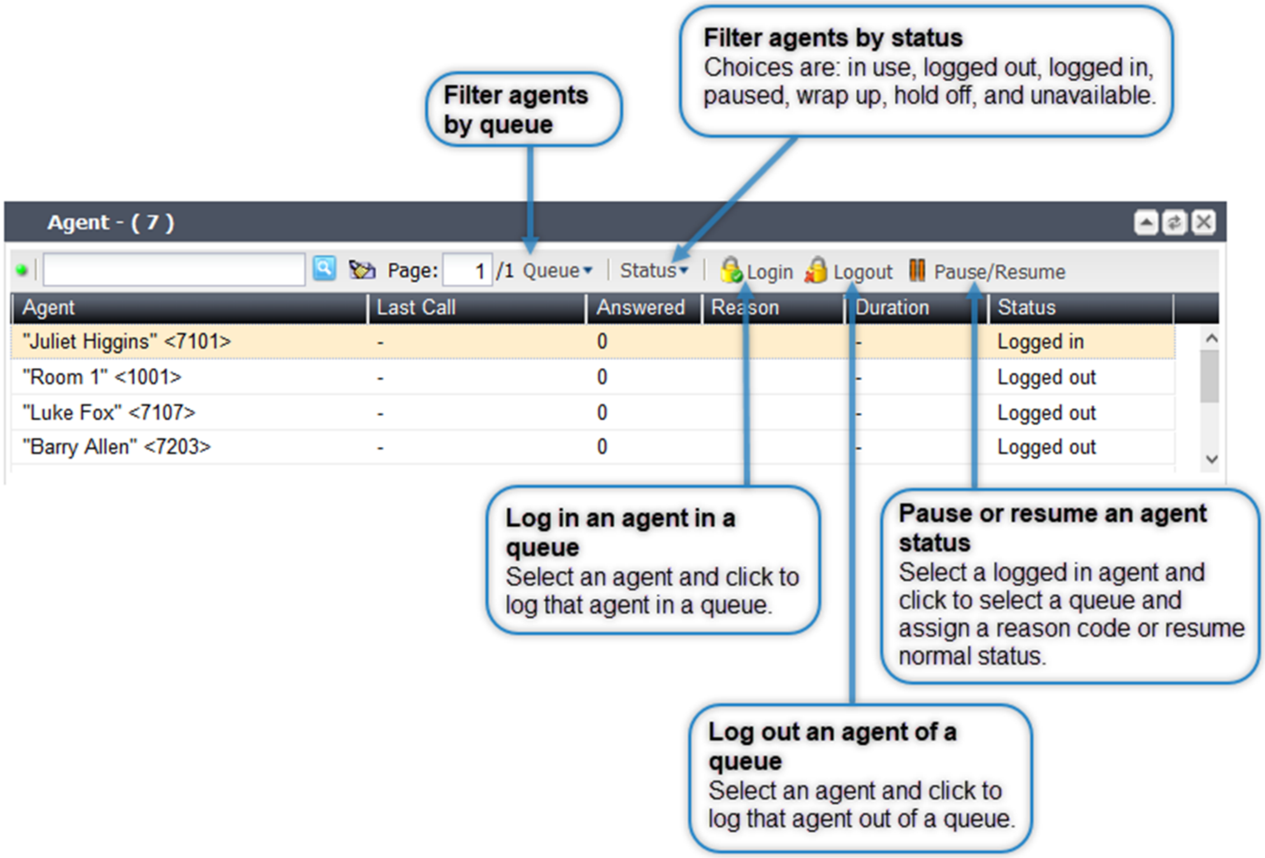
For more details, see also the following sections:

- Checking the queue status on page 52
- Taking a pause from queues on page 52
- Resuming taking calls from queues on page 53

Agent (agent profile view)

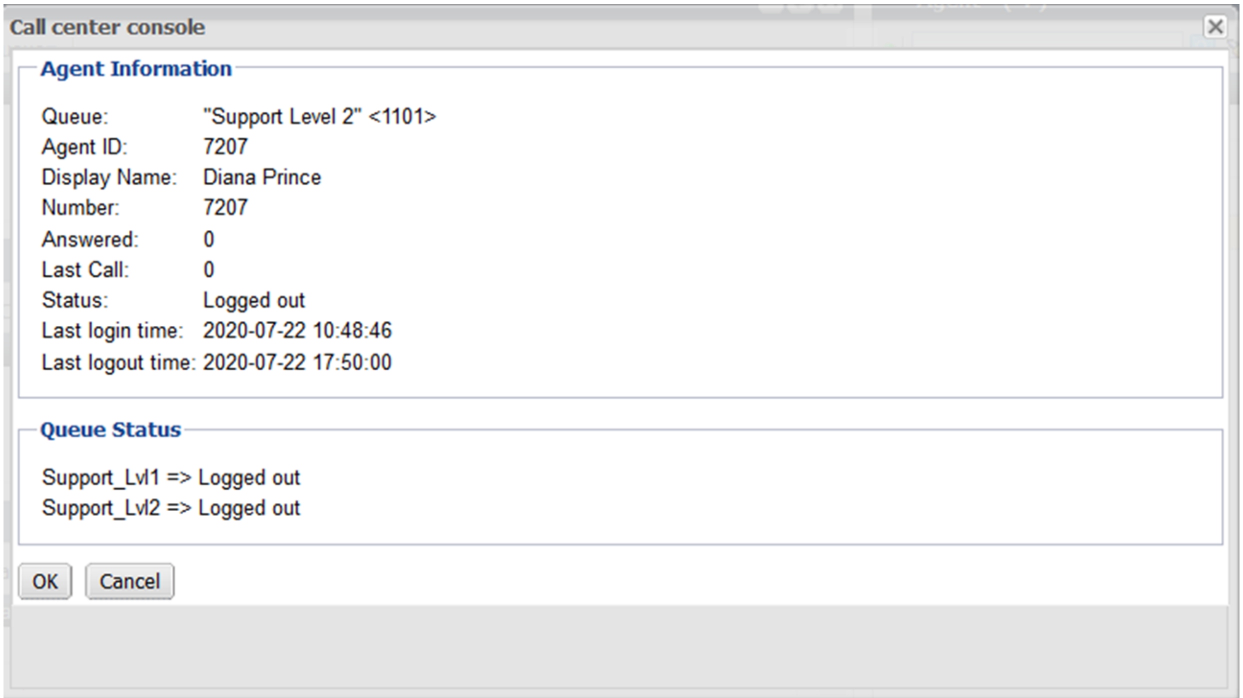


Agent (manager profile view)



Viewing agent details

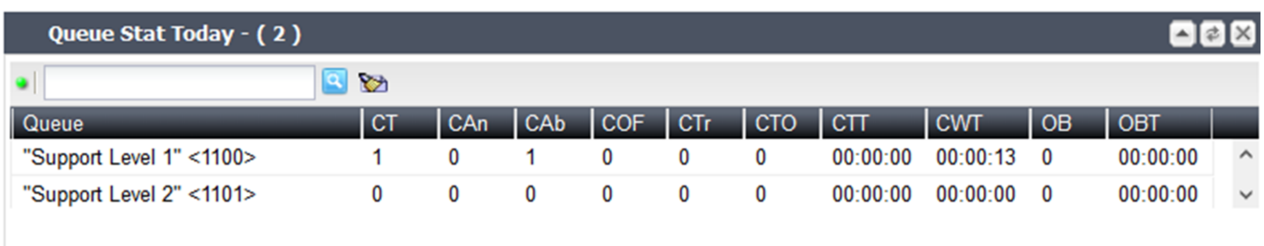
1. In the **Agent** widget, double-click on an agent.
2. You can review the agent information and queue status. Here is an example:



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 64.



Abbreviations used in the Queue Stat Today widget

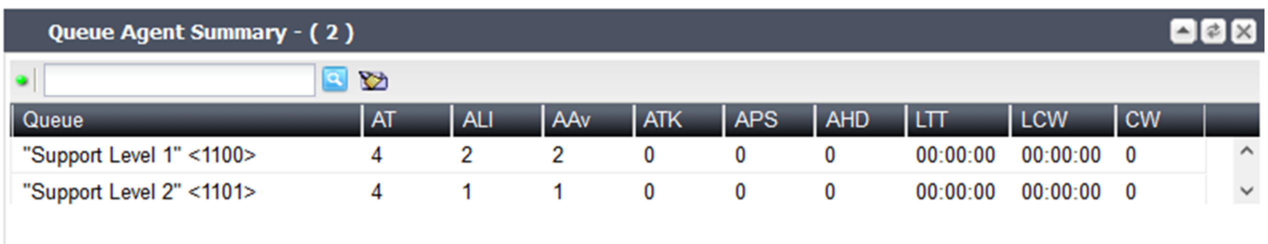
Abbreviation	Full name
CT	Call total
CAn	Call answered

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 65.



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

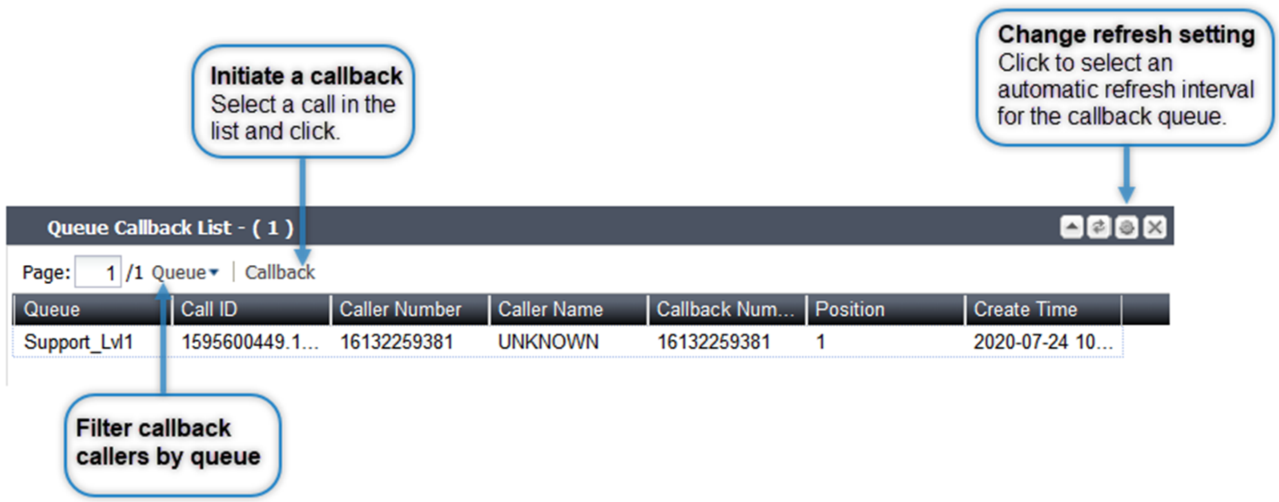
Queue Callback List

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)



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 agent and queues performance.

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

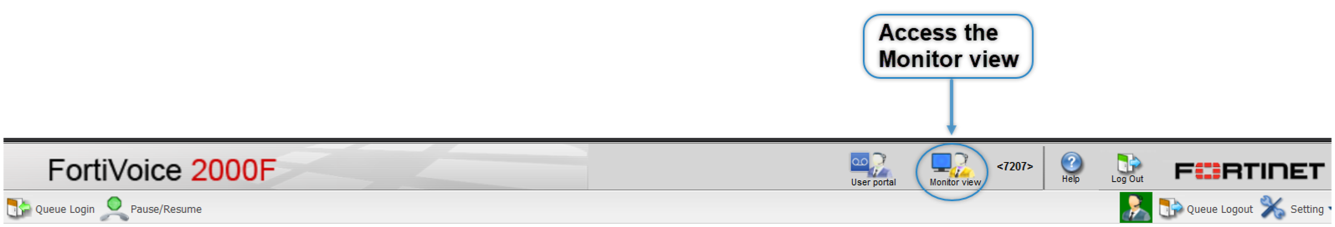
This section includes the following topics:

- Setting up the Monitor view on page 67
- Accessing the Monitor view on page 67
- Opening a wallboard in the Monitor view on page 67

Setting up the Monitor view

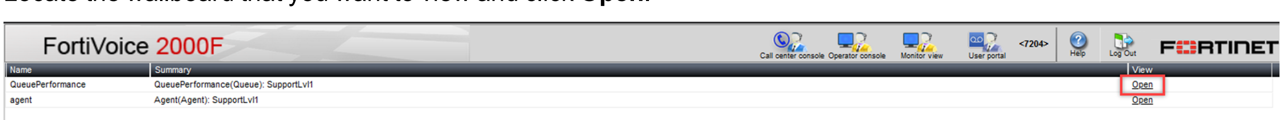
The FortiVoice administrator accesses the FortiVoice phone system to set up the Monitor view. For more details, see the Setting up the Monitor view section in the FortiVoice Phone System Administration Guide.

Accessing the Monitor view



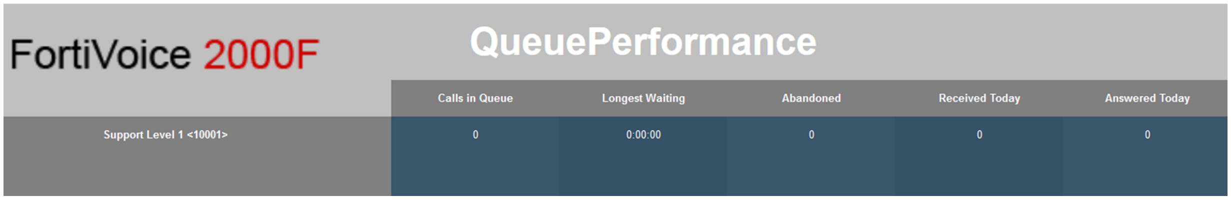
Opening a wallboard in the Monitor view

1. Access the **Monitor view**.
2. Locate the wallboard that you want to view and click **Open**.

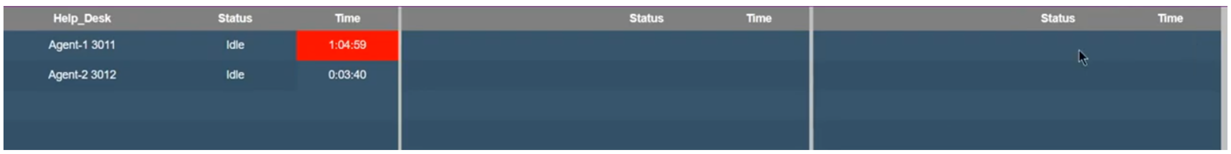


In the following example, the FortiVoice administrator completed the creation of two monitoring views on the FortiVoice phone system to observe the following performances:

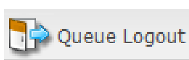
- Queue performance

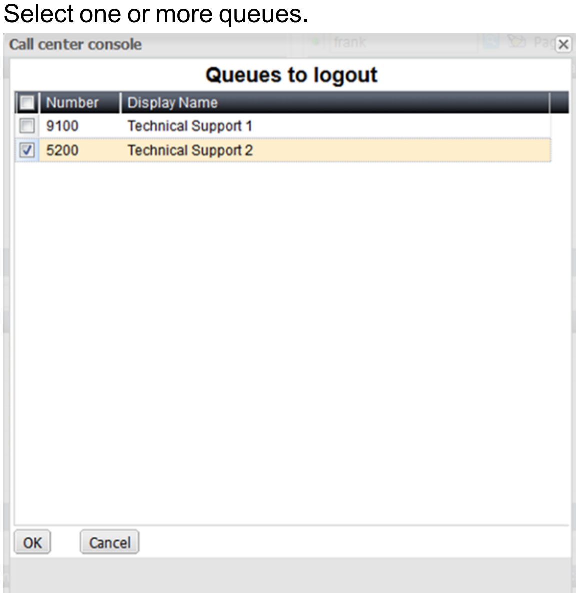


- Agent performance



Logging out of queues

1. To log out of queues, click .
2. Select one or more queues.



3. Click **OK**.

Logging out of the call center console

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

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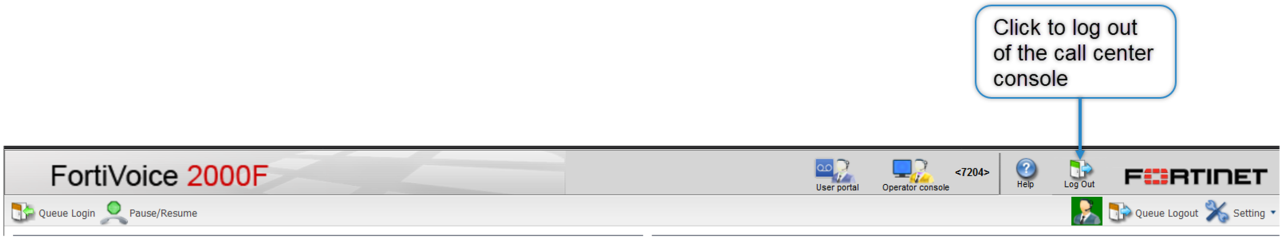
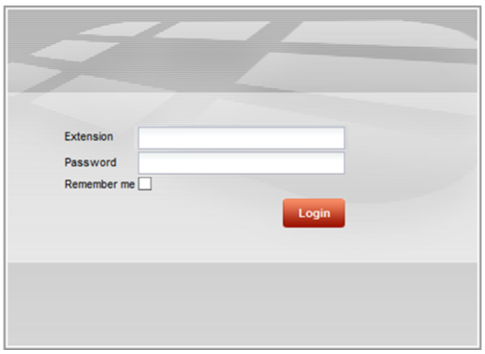


2. If you are still logged in to one or more queues, follow the prompts to log out of the queues.
3. After completing the console logout, the following dialog box appears:



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