



# FortiVoice™

Version 7.00  
Start Guide

**FORTINET®**

## ***FortiVoice Version 7.00 Start Guide***

Revision 2

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# INTRODUCTION


## About this guide

This guide describes the steps required to do basic installation and configuration of your FortiVoice telephone system. Once you have completed these steps, your system can be further customized for your needs. For complete management details, refer to the *FortiVoice User Guide*.

This guide is intended for use with FortiVoice.

## Where to go for further information

You can find additional documentation:

- Within the FortiVoice Management Software by clicking the **Help**  icons.
- By clicking **Start > Programs > FortiVoice 7.00 > FortiVoice Configuration 7.00 > Documentation** once the software is installed.
- On the Fortinet Technical Documentation website at:  
**<http://docs.fortinet.com>**

## Documentation

In addition to this guide, the following documentation is available:

- The *FortiVoice User Guide* provides complete information about the FortiVoice system.
- The *VoIP Configuration Guide* describes setting FortiVoice up for VoIP (voice over IP) operation.
- *Adding IP Phones* in Chapter 2 of the *FortiVoice User Guide* describes configuring IP extensions.
- FON telephone guides show how to use FortiVoice phones.
- Help built into the FortiVoice Management Software describes each window.

## Contacting Technical Support

If you encounter difficulties with the installation or management of your FortiVoice system, consult the documentation. If you still have questions, contact your authorized FortiVoice reseller or visit **<http://www.fortinet.com/fortivoice>**.

## GETTING STARTED

### Checking package contents

Each package has the following, and may include region-specific materials:



- FortiVoice phone system
- AC adapter and AC power cord
- RJ-11 telephone cables for each telephone line
- RJ-45 Ethernet cable
- Wall mount template, screws, and anchors for optional wall-mounting
- FortiVoice Management Software CD
- Reference cards for each extension
- EULA
- Start Guide

### Recommended PC system specifications

You will need a PC to configure your phone system. Your PC should have:

- Fully updated Windows 7 (32-bit) / Vista (32-bit) / XP / 2000
- Updated Java Runtime Environment (version 6 update 23 or higher)
- Processor: 1 GHz
- RAM: Windows 7 and Vista: 1 GB; Windows XP and 2000: 512 MB
- Hard disk space: 250 MB
- Screen resolution: 1024x768

**Network equipment:** Ethernet connection to your LAN is required for FortiVoice configuration and IP phone setup. If you plan to use VoIP or external IP phones, you will also require a broadband Internet connection.

### Checking telephone and network wiring

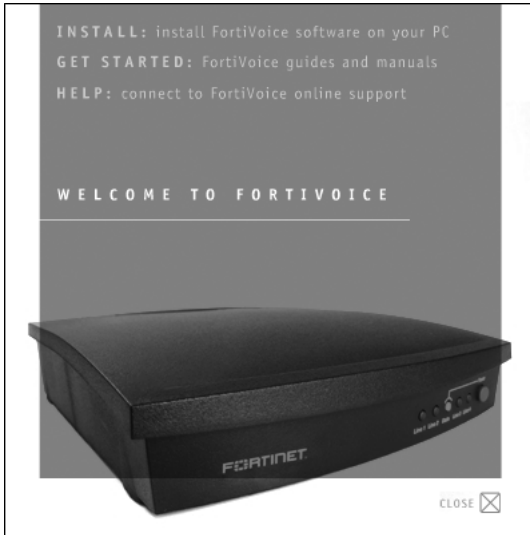
The system doesn't require telephone and network wiring beyond the standard infrastructure in most commercial and residential offices. If your premises require additional wiring for extensions, consult an authorized reseller in your area.



**Caution! Lightning and electrical surges can damage the FortiVoice unit. We recommend using surge protection equipment on all external telephone and power lines connected to this device.**

## STEP 1 — INSTALLING THE MANAGEMENT SOFTWARE

1. Ensure you have Administrator privileges on your PC.
2. Turn your computer on and insert the CD into the CD-ROM drive.
3. The **Install** main window will appear within 20 seconds. Click **INSTALL** and follow the instructions.



If the installation program does not automatically start (for example, if Autorun is disabled on your PC):

1. From the desktop, double-click the **My Computer** icon.
2. Double-click on the CD drive.
3. Double-click on **startscreen.exe** located in the Start folder.
4. Click **INSTALL** and follow the instructions.

## STEP 2 — CONNECTING THE FORTIVOICE UNIT TO YOUR PC OR NETWORK

The FortiVoice unit can be set up anywhere in the vicinity of your telephone lines and computer. Connect the FortiVoice unit to your PC using a LAN (local area network) connection.

If you're installing a FortiVoice system with multiple units, or you're adding a FortiVoice unit to an existing system, refer to *Step 9 — Networking FortiVoice units* on page 20.

### Connecting to a LAN

Connect one end of the provided RJ-45 Ethernet cable to the LAN port at the back of the FortiVoice unit and the other end directly to your network (i.e. Ethernet switch, router, etc.). Ensure your computer is connected on the same network.



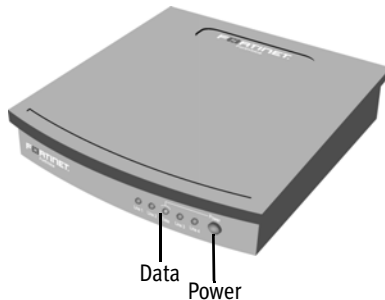
### Powering up the FortiVoice unit

1. Connect the provided AC adapter to the power port at the back of the FortiVoice unit and plug the adapter into a surge-protected power outlet.



**Caution! Never use an AC adapter other than the one provided with the FortiVoice unit.**

2. Press the **Power** button on the front of the unit. The lights on the front panel will flash for a few moments during boot-up, then stop. The **Data** light will remain lit, indicating the FortiVoice unit is on.



## STEP 3 — CONNECTING TELEPHONE LINES AND EXTENSIONS



**Caution! Lightning and electrical surges can damage the FortiVoice unit. We recommend using surge protection equipment on all external telephone and power lines connected to this device.**

### Connecting a single-line telephone line

A single-line wall phone jack has one telephone line.

Use the provided RJ-11 telephone cables to connect telephone lines to the FortiVoice unit. These cables have a 2-wire connector for connection to a single-line wall phone jack.

1. Connect one end of the provided RJ-11 telephone cable to the wall phone jack of a telephone line, and the other end to the L1 jack on the back of the FortiVoice unit.
2. If necessary, connect additional telephone lines to the L2 – L8 jacks.

2-wire connector



2-line unit



L1 L2

### Connecting a 2-line telephone line

A 2-line wall phone jack has two telephone lines.

FortiVoice units require that each telephone line be connected to a separate jack on the back of the FortiVoice unit.

Use two of the provided RJ-11 telephone cables and a dual-to-two-single-line adapter to connect a pair of telephone lines to the FortiVoice unit.

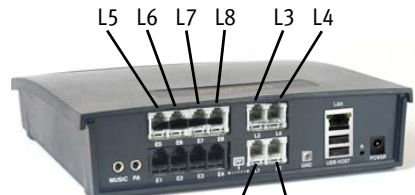
1. Connect the dual-to-two-single-line adapter to the wall phone jack.
2. Connect one end of the provided RJ-11 telephone cable to the adapter, and the other end to the L1 jack on the back of the FortiVoice unit.
3. Connect one end of the second RJ-11 telephone cable to the adapter, and the other end to the L2 jack.
4. If necessary, connect additional telephone lines to the L3 – L8 jacks.

4-line unit



L3 L4  
L1 L2

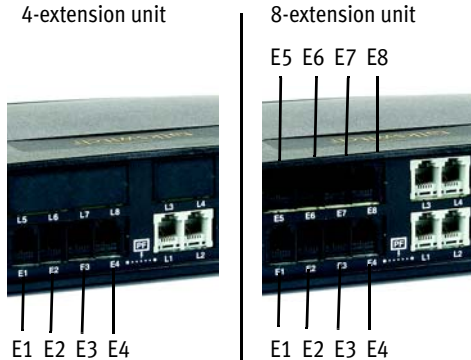
8-line unit



L5 L6 L7 L8 L3 L4  
L1 L2

## Connecting analog extensions and a fax machine to the FortiVoice unit

Connect the cables from your analog phones and fax machines to the E1 – E8 jacks on the back of the FortiVoice unit.



## Connecting IP phones

Connect a network cable between the LAN port on the phone and your network (i.e. Ethernet switch, router, etc.). Some IP phones also have a PC port, which can be used to connect the PC to the network if only one network connection is available.

See *Adding IP Phones* in Chapter 2 of the *FortiVoice User Guide* for detailed instructions on how to connect IP phones. If you are setting up external IP extensions, see the *VoIP Configuration Guide* as well.

## Connecting an external audio source (optional)

You can add music on hold to your system from an internal music file or external audio source. If you use a music file, no further connection or configuration is required. If you use an isolated external audio source such as a CD player or sound card, connect a 1/8" (3.5 mm) mono phono connector cable to the MUSIC jack of the FortiVoice.

If your system has multiple FortiVoice units, you will need to provide audio to the MUSIC jack of each unit.

For complete details on configuring music on hold and for using internal music files, refer to *On-Hold/Ringback* in Chapter 2 of the *FortiVoice User Guide*.



### Connecting to a PA system (optional)

You can connect the FortiVoice unit to a PA amplifier. A user can then dial \*0 to make an overhead page. The PA jack can also be used for voicemail screening. The FortiVoice unit will play the call through the PA jack if a caller or user accesses a voice mailbox.

Connect a 1/8" (3.5 mm) mono phono connector cable from the PA jack of the FortiVoice unit to the amplifier.

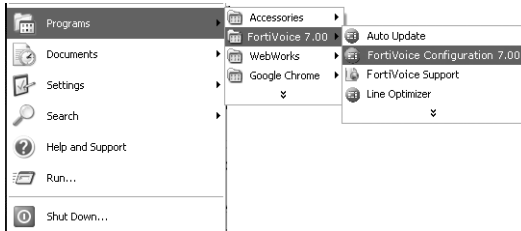
If your system has multiple FortiVoice units, you may need to connect the PA jack of each unit to the amplifier.

For complete details on configuring the PA jack, refer to *PA options* in Chapter 2 of the *FortiVoice User Guide*.

## STEP 4 — OPENING THE MANAGEMENT SOFTWARE

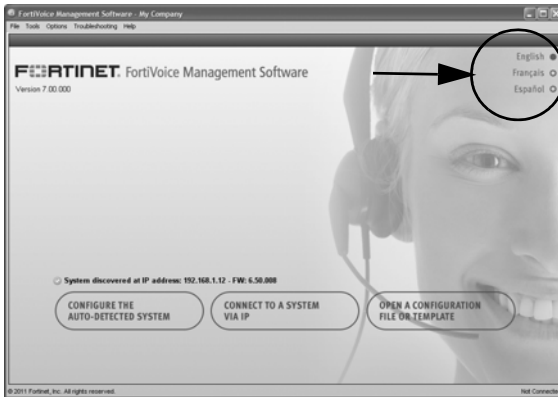


1. Double-click the **FortiVoice Configuration 7.00** icon on your desktop.



(Alternatively, click **Start > Programs > FortiVoice 7.00 > FortiVoice Configuration 7.00.**)

The **FortiVoice Management Software** window appears, and the software attempts to detect your FortiVoice unit.



2. Select your language:  
*English, Français or Español.*
3. Once the software detects your FortiVoice unit, click **Configure the Auto-Detected System**. The **About** page appears.

If the software was unable to detect your FortiVoice unit, check that all your wires and plugs are securely connected, and then click **Retry Auto-Discovery**.

If auto-detection does not work, connect an analog phone to the FortiVoice unit, and then dial **#91#**. The FortiVoice unit will provide its IP address. Click **Connect to a Different System**, and then enter the IP address. The **About** page appears.

If you want to open or create a configuration file, click **Open a Configuration File or Template**.

For more information, refer to *File menu* in Chapter 2 of the *FortiVoice User Guide*.



## STEP 5 — SETTING THE PASSWORD AND REGION



**Caution!** Configure the FortiVoice password and keep it in a secure location. Failure to do so could leave your FortiVoice vulnerable to configuration changes, misuse and/or lock-out by callers or users. If the router has port mapping to the FortiVoice unit for remote configuration, the system will also be vulnerable to anyone on the Internet.

Change the system password frequently to prevent unauthorized users from making calls or changing the configuration.

1. Select the **Administration** page.

2. Optionally enter the *System name*. This should be the company name, or a shortened form suitable for use as caller ID during VoIP calls.
3. Enter a *System password*. It must be a 4- to 8-digit numeric password so you can enter it on a touchtone phone. The system password is required for access to the configuration. Confirm the password.
4. Choose a *System Numbering Plan*. You can use a 3-, 4- or 5-digit plan for extensions, ring groups, mailboxes, multi-branch numbers and speed dials in your system. The default is 3 digits. To change it, click **Change** and select the desired number of digits. This selection is system-wide: for example, you can't have a mix of 3- and 5-digit extension numbers.

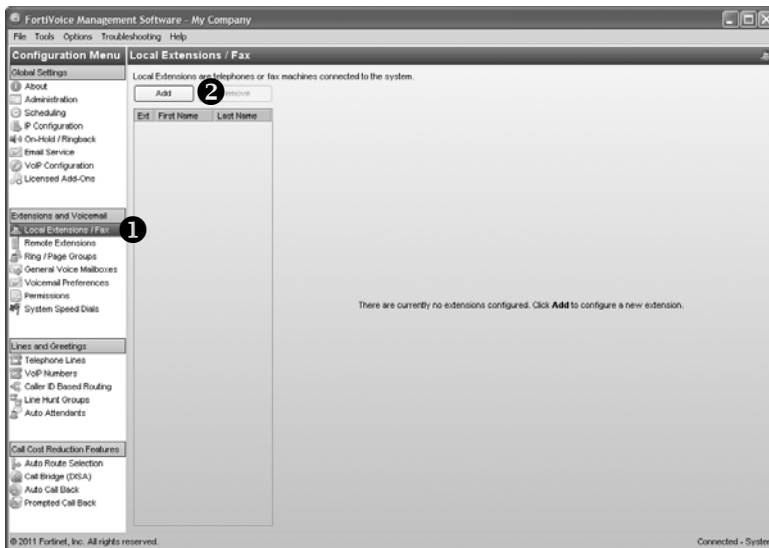
Numbers available per plan:  
3-digit numbers: 100 to 399  
4-digit numbers: 1000 to 3999  
5-digit numbers: 10000 to 39999

In VoIP-enabled systems, regardless of the number of digits used, a block of 50 numbers is allocated to VoIP speed dials. By default, the VoIP speed dials are 350 to 400. To change the default block of VoIP speed dials, see *Setting up a multi-branch profile* in the *FortiVoice User Guide*.

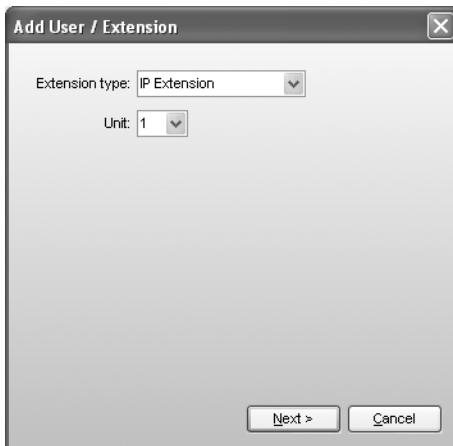
5. If the *Region Selection* area is present, select the country where your phone system will operate.
6. Optionally load additional languages for system prompts, and set the default language for system prompts heard by callers and users.
7. Optionally set up what the system will do if a local extension dials **0** (**9** in some countries). If you wish to have an extension ring when users dial **0** (typically the receptionist's phone), you must first configure an extension. See *Step 6*.

## STEP 6 — CONFIGURING EXTENSIONS FOR PHONE USERS

1. Select the **Local Extensions/Fax** page.



2. Click **Add**.
3. In the **Add User / Extension** dialog box, select the *Extension type*. Choices are *Regular phone or fax* and *IP extension*. *Regular phone or fax* allows you to set up an analog extension.



4. In a multi-unit system, select the FortiVoice unit the extension will be associated with. This unit will hold the voicemail for the extension. For analog extensions, this must be the unit that the analog phone is plugged into.
5. Analog extensions: select the jack the analog phone is plugged into. Click **Next**.
6. Enter the *First name* and *Last name* of the user. The names are used in the dial-by-name directory and caller ID.

A suggested range is 100-199

First name:

Last name:

Extension number:

Manufacturer: Other

Model: Other

MAC address:

7. Assign an *Extension number*.
8. Select the *Manufacturer*.
9. Select the phone *Model*. Supported models and manufacturers vary by market. If you are using IP phones, we strongly recommend you use only supported models. However, if you have an unsupported IP phone, you can select *Other*. Other IP phones that support the G.711 codec ( $\mu$ -law or A-law) may work with the system, but will not offer all of the functions and special features of FON phones. Further configuration of these IP phones will be limited to the programmable options on the phones themselves.
10. If you're setting up an IP phone, enter the *MAC address* of the phone. You can click **Select** to choose from addresses of phones connected to the system, or enter the MAC address manually. The MAC address is printed on the bottom of the phone and on the phone's shipping box.
11. Click **Finish**.

The information you configured now appears in the *Extension* tab, and you can edit it directly there if you need to make changes. Select any extension in the menu under the **Add** and **Remove** buttons to access its configuration details.

12. Choose **File > Save**. The software transfers the configuration settings to the FortiVoice system, and backs up the settings to a file.

In the *Extension* section, you can select the language for prompts heard by the user of the extension in the *System prompt language list*.

The *Voicemail* tab is now visible for each extension. See *Voicemail tab* in the *FortiVoice User Guide* for more information.

Each user can record his or her own voicemail message and set the personal options.

1. Press the **voicemail** button on the phone, or dial **\*\*#**.
2. Follow the prompts to configure a password, record a greeting, change personal options, and record the name for the dial-by-name directory.

For complete details, refer to *Using the voicemail system* in Chapter 3 of the *FortiVoice User Guide*.

The **Additional Settings** window enables you to set up or customize access to lines or hunt groups for outbound calls, designate the extension as a hotline, select Caller ID display options, etc. See the *FortiVoice User Guide*.

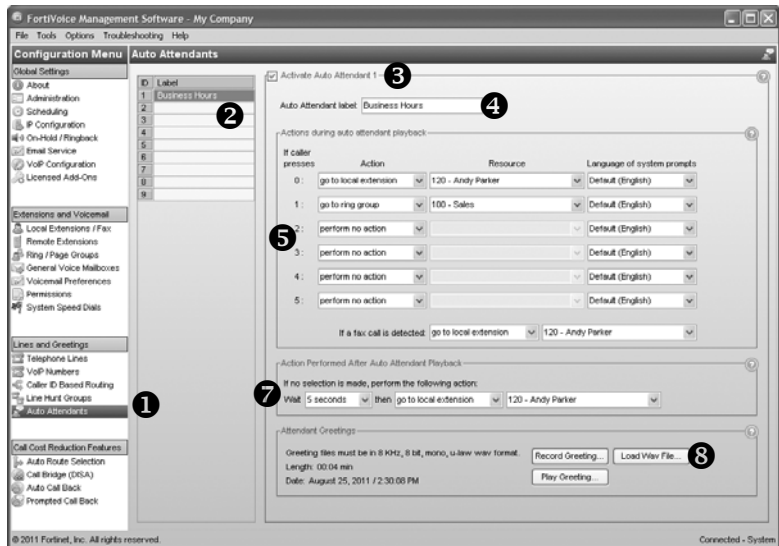
## STEP 7 — CONFIGURING AN AUTO ATTENDANT

An auto (automated) attendant answers incoming calls and plays a greeting that offers options. For example, an auto attendant can instruct callers to dial extensions, or dial **0** to reach the receptionist. It can also tell them how to:

- Hear prompts in a different language.
- Listen to an announcement with store hours and location.
- Access the dial-by-name directory.
- Reach the next available agent in the sales group or support group.
- Leave a voicemail.

If you don't want to set up an auto attendant now, you can proceed to *Step 8 — Configuring telephone lines* on page 17.

### 1. Select **Auto Attendants**.



2. Click **1** to configure *Auto Attendant 1* (default selection).
3. Mark the *Activate Auto Attendant 1* check box.
4. In *Auto Attendant label*, give your auto attendant a descriptive name (e.g. *Business Hours*).
5. In the drop-down lists next to *If caller presses 0*: (**9** in some countries), set *Action* to *go to local extension*. Under *Resource*, select the desired extension.
6. Repeat for other auto attendant number options (e.g. dial **1** for sales).

7. Configure the auto attendant to transfer the call to the receptionist if the caller doesn't respond. This can occur if the caller doesn't have a touchtone phone, or doesn't understand the greeting. Select *5 seconds, go to local extension*, and the desired extension.
8. Record or load an auto attendant greeting.

### Auto attendant greetings

The auto attendant greeting should greet the caller, identify your company and explain the options you set up in Step 7. For example, if you set up the auto attendant shown above, the greeting could say:

*"Welcome to Example Company. If you know your party's 3-digit extension, please dial it now. For the sales department, press 1. To reach the receptionist, dial 0 or stay on the line."*

### Generic auto attendant greeting

There is a generic auto attendant greeting you can use in C:\Program Files\Fortinet\FortiVoice Configuration 7.00\Greetings\Auto Attendant Sample.wav.

*"Welcome. If you know the 3-digit extension of the person you wish to reach, please dial it now. Otherwise press 0 to reach the next available representative. Thank you."*

### Recording an auto attendant greeting

To record a greeting for *Auto Attendant 1* from the FortiVoice Management Software:

1. Select **Auto Attendants**.
2. Under the *Attendant Greetings* section, press **Record Greeting**. A window appears.
3. Select the extension from which you would like to record. The system will engage that phone. Follow the prompts to record your greeting.

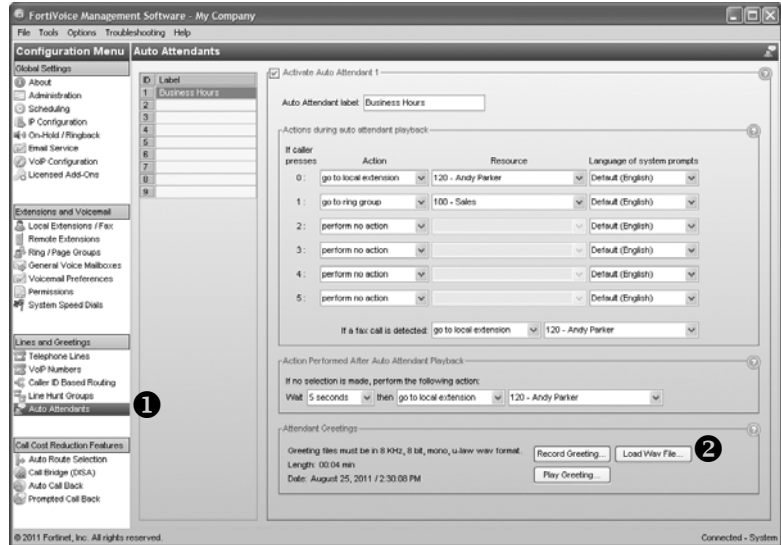
To record a greeting for *Auto Attendant 1* from an extension:

1. Enter command mode either by pressing # from an analog extension, or **\*55#** from a FON IP phone, followed by the system password, then #. (Other brands may use **\*55 SEND** or **\*55 DIAL**.)
2. Dial **41#**, and then follow the prompts to record your greeting.

## Loading a recorded auto attendant greeting

You can load a professionally recorded greeting. The file must be an 8 kHz, 8-bit, mono,  $\mu$ -law .wav file, up to 5 minutes.

### 1. Select **Auto Attendants**.



2. Click the **Load Greeting** button. The **Select Wav File** window appears.

3. Browse to the .wav file.

4. Click the **Load** button.

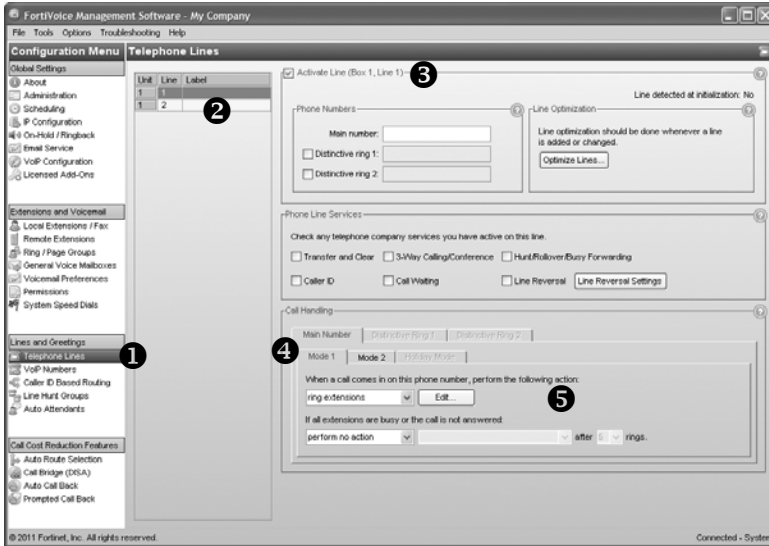
For complete details and options, such as auto fax detection, refer to *Auto Attendants* in Chapter 2 of the *FortiVoice User Guide*.

## STEP 8 — CONFIGURING TELEPHONE LINES

If you are using VoIP lines with your system, see the *VoIP Configuration Guide*. The following instructions pertain to traditional telephone lines.

Set up your telephone lines to route incoming calls to an auto attendant, extensions or a voice mailbox.

### 1. Select **Telephone Lines**.



2. Click **Unit 1, Line 1** to set up line 1.
3. Select the *Activate Line* check box. In some regions, select from the *Service Provider* list.
4. Select the *Mode 1* tab in the *Main Number* tab.

A mode is a period of time with particular call handling. For example, a call can ring extensions during Mode 1 (business hours), and go to voicemail during Mode 2 (evenings and weekends).
5. Set up call handling for the telephone line, as described on the following pages.

## Playing the auto attendant immediately

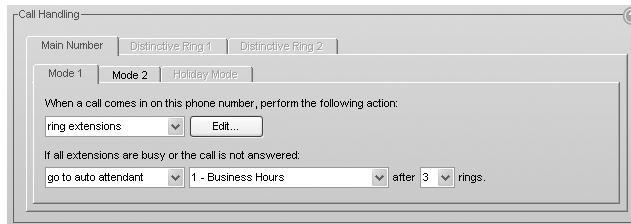
The auto attendant can immediately answer all incoming calls on this telephone line.

In the *Call Handling* area, under *When a call comes in on this phone number, perform the following action:*, select *go to auto attendant, 1* (or the name of the auto attendant).

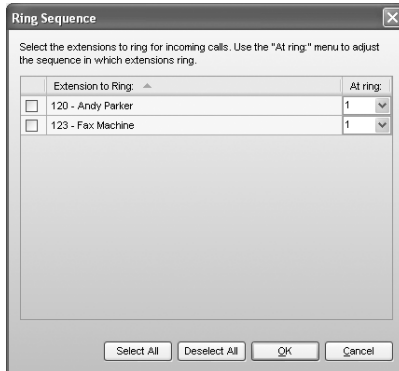
## Ring extensions before playing the auto attendant

The system can ring selected extensions, and then play the auto attendant if no one answers.

1. Select *ring extensions*.



2. Click **Edit**. The **Ring Sequence** window appears. Select the extensions to ring, and set up their ring sequence. Click **OK**.

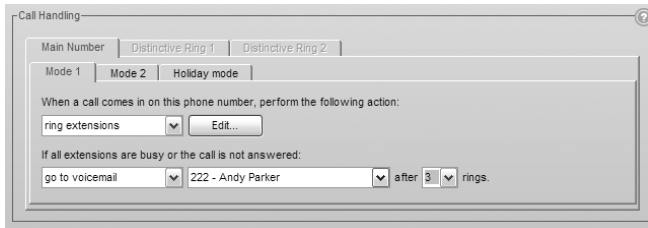


3. Under *If all extensions are busy or the call is not answered:*, select *go to auto attendant*, specify the one you want and the number of times the phone will ring before going to the auto attendant.

## Sending calls to voicemail

The system can ring selected extensions, and then send the call to voicemail if no one answers.

1. Select *ring extensions*.

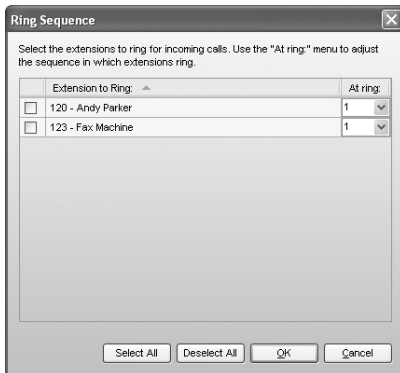


The screenshot shows the 'Call Handling' configuration window. It has tabs for 'Main Number', 'Distinctive Ring 1', and 'Distinctive Ring 2'. Under 'Main Number', there are sub-tabs for 'Mode 1', 'Mode 2', and 'Holiday mode'. The 'Mode 1' tab is active. The window contains the following text and controls:

When a call comes in on this phone number, perform the following action:  
ring extensions [dropdown] [Edit...]

If all extensions are busy or the call is not answered:  
go to voicemail [dropdown] 222 - Andy Parker [dropdown] after 3 [dropdown] rings.

2. Click **Edit**. The **Ring Sequence** window appears. Select the extensions to ring, and set up their ring sequence. Click **OK**.



The screenshot shows the 'Ring Sequence' configuration window. It has a title bar with a close button. The window contains the following text and controls:

Select the extensions to ring for incoming calls. Use the "At ring" menu to adjust the sequence in which extensions ring.

Extension to Ring	At ring
<input type="checkbox"/> 120 - Andy Parker	1 [dropdown]
<input type="checkbox"/> 123 - Fax Machine	1 [dropdown]

[Select All] [Deselect All] [OK] [Cancel]

3. Under *If all extensions are busy or the call is not answered*, select *go to voicemail*, the voice mailbox number, and the number of rings (e.g. after 3 rings).
4. Save settings to FortiVoice.

## STEP 9 — NETWORKING FORTIVOICE UNITS

FortiVoice units and IP phones can be networked over a LAN to increase the number of lines and extensions in your system.



**Caution! FortiVoice unit enclosures are not designed for stacking. We recommend wall-mounting the units in a horizontal row to maximize airflow and prevent overheating.**

### Connecting FortiVoice units

Use RJ-45 Ethernet cables to connect up to four FortiVoice units to your network (i.e. Ethernet switch, router, etc.).

### Powering up all FortiVoice units

1. Connect the provided AC adapters to the power ports of each FortiVoice unit and plug each adapter into a surge-protected power outlet.
2. Turn on the FortiVoice units by pressing the **Power** button on the front of each unit.

### Setting FortiVoice unit ID numbers

Each FortiVoice unit is pre-programmed with unit ID 1. When you plug multiple units in for the first time or add one to an existing network, the newly added units will automatically choose an available unit ID number. To confirm the unit ID assigned:

1. Connect a phone to the FortiVoice unit for which you would like to check the unit ID.
2. Lift the phone handset.
3. Dial **\*55**, enter the administrator password it assigned, then dial **00#**.

### Configuring networked units

Now that you have connected your FortiVoice units and checked the unit ID numbers, you can configure the new unit(s). Return to *Step 3 — Connecting telephone lines and extensions* on page 5 and follow the subsequent steps to complete the configuration of your expanded FortiVoice system.

# SETUP COMPLETE

## Congratulations!

Your FortiVoice system is ready to accept incoming calls. Put a quick reference card next to each extension phone to help employees become familiar with the FortiVoice features.

## What's next?

Refer to the built-in Help files or the *FortiVoice User Guide* for instructions on how to set up:

- Modes for handling incoming calls after hours and during holidays.
- Local extensions for placing and receiving calls within the office.
- Remote extensions for receiving calls outside the office.
- Ring groups so callers can reach the first person available in the sales, support or other team.
- Call cascades to automatically transfer unanswered calls between local extensions, remote extensions and ring groups.
- Caller ID based routing to automatically transfer calls based on who's calling.
- Line hunt groups to control access to outbound telephone lines.
- System speed dials to quickly call clients from any extension.
- E-mail to notify users when they have voicemail.
- Auto route selection, call bridge and call back to reduce costs.
- Remote management for using the FortiVoice system via the Internet.



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