

Portal Administrator guide

Admin Guide

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About your Portal admin account

Your settings

As an organization admin in the StarLeaf Portal, you can:

- add and edit users and room systems
- view details of your organization's account
- view your own personal profile
- view and create your own scheduled meetings

User email notifications

Certain user changes trigger email notifications:

- When you set up a new user, that user receives an email telling them to activate their account
- When you first provision a user with a hardware endpoint, you can choose to send that user information about settings and dialing details
- When a user creates a scheduled or permanent meeting, each participant receives an email. Any subsequent changes to this meeting can also cause participants to be notified by email
- Certain emails are generated by the sending of StarLeaf app guest invitations. For more information, refer to [About guest invites](#)

Calling to telephone networks

Connection from your StarLeaf endpoints to the public telephone network and or to SIP trunk calling is an optional extra. For more information, contact your StarLeaf representative.

Edit your organization's account

Select **Edit organization** from the navigation menu. The **Edit organization** page appears:

- **Organization reference:** A unique identifier for your organization
- **Organization prefix:** This is the organization's dialing prefix and has two purposes:
 - StarLeaf uses the organization prefix to create an **External video address** for each user. If there are people outside your organization who have video endpoints made by 3rd-party manufacturers, they are able to dial a user's **External video address** (visible on each user's page in the Portal and also in StarLeaf app settings or through the touchscreen controller of a hardware endpoint)
 - If your organization owns 3rd party H.323 endpoints and you want to register these with StarLeaf, the H.323 ID or name that you allocate to that endpoint uses the organization prefix in combination with your subdomain name and that endpoint's directory number
 You cannot change your **Organization reference** or **prefix**

Your organization's account page is pre-populated with your organization details. You can edit organization details if necessary:

- **Organization name:** The name of your company
- **Subdomain:** The name of your subdomain for external calls from H.323/SIP/Skype. StarLeaf assigns the customer **<subdomain>.call.sl** to make and receive calls to and from third-party devices. For more information about video addresses, refer to [About StarLeaf video addresses \(p1\)](#)
- **Company email domains:** Optionally, enter any corporate domains that you own and use to send email. This is so that StarLeaf can recognize when a user invites, as a guest, someone who appears to be part of your organization. Use a comma to separate multiple domains. Include the whole domain name, for example: **example.com, starleaf.com**. If any user sends a StarLeaf app invite to someone who appears (by the email address) to belong to your organization, that guest is automatically added to your account as a user. You can leave this field empty. However, StarLeaf recommends that email domains are entered where possible to avoid users from within the same organization being allocated guest user accounts
- **Country:** The location of the data center that hosts your account
- **Default time zone:** Choose the default time zone for your StarLeaf endpoints. Note that you can change the time zone on a per-user basis
- **Default language:** Choose the default language for your StarLeaf endpoints' displays. Note that you can change the language on a per-user basis. The StarLeaf app, and StarLeaf endpoints have localizable user interfaces. StarLeaf also provides localized emails and end-user pages in the StarLeaf Portal.

When a user changes their language via the Portal, or when the administrator changes users' language settings, the affected users need to log out of the Portal and log in again to see the new language. For emails, the email is sent in the language of the

inviter, unless StarLeaf knows the language of the receiver, in which case the email is in the correct language for the receiver


Advanced organization settings


If necessary, specify the advanced settings for the account:


▼ **Advanced settings**


Endpoint settings PIN:

Default layout for conferences:









Power line frequency (Hz):

- **Endpoint settings PIN:** You can enable PIN protection of your StarLeaf hardware endpoints. If you enable this, you are not able to change the configuration settings through the touchscreen controller unless you enter the correct PIN. This is an organization-wide setting and affects all StarLeaf endpoints in the organization
- **Default layout for conferences:** Choose the layout that is the organization's default layout for conferences (both scheduled and ad hoc). Individual users can choose a different layout if they prefer. Conference layouts are described in [About conferencing](#)
- **Power line frequency:** The power line frequency for this organization. Altering this setting can eliminate camera flicker from fluorescent lights. Do not change this setting unless you are experiencing flicker

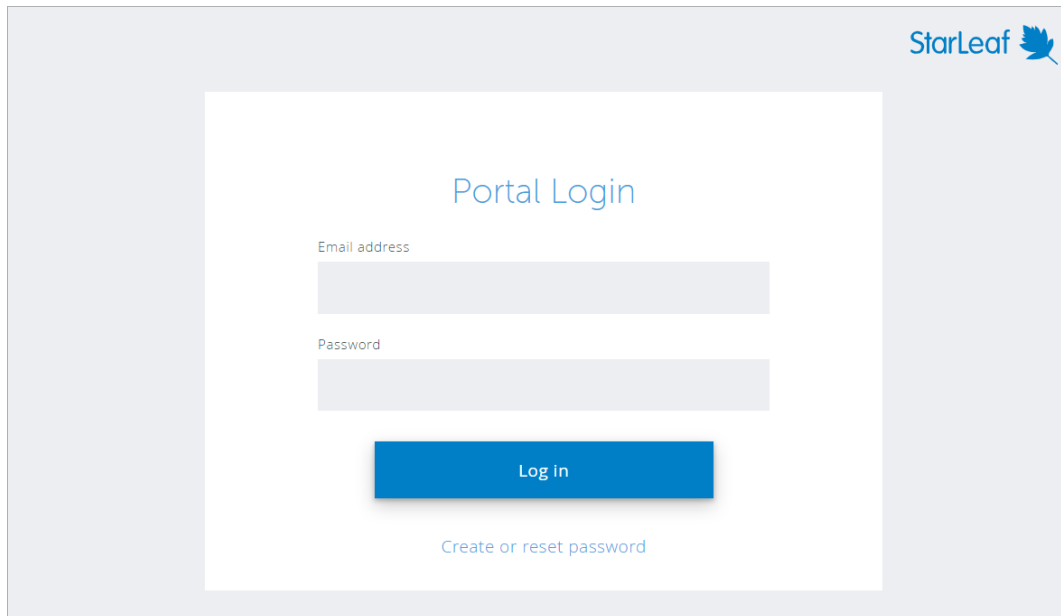
Log in to your account

Supported browsers:

- Google Chrome
- Mozilla Firefox
- Apple Safari
- Microsoft Internet Explorer 8 and later
- Microsoft Edge

Portal URL:

<https://portal.starleaf.com>



If this is the first time you have logged in to your account, you need to read and agree to the terms and conditions before you can proceed.

To learn more about what you can do as an admin in the StarLeaf Portal, go to [About your Portal admin account \(p3\)](#).

About your landing page

When you log in to your StarLeaf account, you see a view similar to this:

Ext.	First name	Last name	Email address
2101	Alexis	Reena	alexis.reena@xampleco.com
2102	Trudie	Doriane	trudie.doriane@xampleco.com
2103	Maya	Kiran	maya.kiran@xampleco.com
2104	Milan	Sylvain	milan.sylvain@xampleco.com
2105	Richard	Cory	richard.cory@xampleco.com

The navigation menu on the left will give you some, or all, of these options:

- **Users:** Lists all users configured on your account. Allows you to add and edit users
- **Room systems:** Lists all room systems configured on your account. Allows you to add and edit room systems
- **Hunt groups:** Hunt groups are an optional extra. Configure hunt groups to ring groups of users
- **Directory entries:** Displays your directory. Allows you to add and edit directory entries
- **All meetings:** Displays a list of all scheduled and permanent meetings in your organization
- **All recordings:** Recording is an optional extra. If enabled, you can see how recording is being used across your organization
- **Branding:** Branding is an optional extra and is described in the [Knowledge Center](#)
- **Call detail records:** This option is available only if call details records have been enabled on your organization's account. If your organization is enabled for call details records, the records are stored for 90 days and you can download them as a CSV file
- **Calls in progress:** If call details records have been enabled on your organization's account, you are also able to view details of calls that are currently in progress in your organization
- **Reports:** Usage reports for your organization
- **Integrations:** Integrations are an optional extra. You will need to use integrations if you are planning to use the Cloud API or integrate with some third party service. To enable integrations, contact StarLeaf Technical Support
- **Edit organization:** Displays and allows you to edit your organization's account details
- **My profile:** Displays and allows you to edit your personal account details
- **Meetings:** Displays a list of all the meetings that you have created and allows you to schedule a meeting
- **Recordings:** Recording is an optional extra. If enabled, you can view a list of your own recordings

As the administrator, you will see all the available options. Users who are not administrators will only see My profile, Meetings, and Recordings.

Edit your own profile

Select **My profile** from the navigation menu. The **My profile** page appears:

The screenshot shows the 'My profile' page in the Cloud Portal. The left sidebar contains a navigation menu with 'Meetings', 'Recordings', and 'My profile'. The main content area is titled 'My profile' and contains a form with the following fields:

- Email address:** maya.kiran@exampleco.com
- First name:** Maya
- Last name:** Kiran
- Password:** (masked with dots)
- Confirm password:** (masked with dots)

Your profile is pre-populated with your account details. These are the details of your own personal account. Edit if necessary:

- **Email address:** Your email address is your unique identifier and you cannot change it. It is also your video address
- **First name/Last name:** Your first and last names appear in the display of your StarLeaf device. Your name is also used in the directory and in the voice and video mail system. If you send an invite to a conference, or an invite to use StarLeaf app, the invites are sent in your name
- **Password:** To change your password, enter a new password here. This is the password that you use to log into the Portal
- **Cell number/Work number/Home number:** You can put your other contact numbers in here. These appear in the company directory. If your organization account allows calls to the PSTN, people are able to contact you on your other contact numbers. Connection from your StarLeaf endpoints to the public telephone network and or to SIP trunk calling is an optional extra. For more information, contact your StarLeaf representative
- **Language:** You can choose a language for your own account or you can use the default organization language. StarLeaf app and StarLeaf endpoints have localizable user interfaces. StarLeaf also provides localized emails and end-user pages in the StarLeaf Portal:
 - meeting invite emails
 - guest user invite emails
 - StarLeaf app activation emails
 - My profile page on the StarLeaf Portal
 - Meetings page on the StarLeaf Portal

Emails are sent in the language of the inviter, unless StarLeaf knows the language of the receiver, then the email is in the correct language for the receiver

- **Timezone:** You can choose a different timezone if you are not in the default timezone for the organization
- **Layout for QuickMeet conferences:**
 - **Use organization default:** Select this to choose to use the organization's default conference layout for all your QuickMeet conferences. The organization default is configured in the **Edit organization** page of your own organization
 - Or choose a particular layout for QuickMeet conferences. Layouts are described in [About conferencing](#)

Create a user account

You can view StarLeaf user accounts in the Portal. StarLeaf creates these accounts in four ways:

- A user has downloaded and signed into the StarLeaf app. StarLeaf can match new users in your organization to your domain when they log in using their work email address. If you have told StarLeaf technical support that you want new users in your organization to receive the app, StarLeaf automatically adds these new users to your StarLeaf account and you will see them on the **Users** page in the Portal
- An API client has created the user account. Some StarLeaf customers create their own applications that can, for example, create users and schedule conferences. For more information, refer to [Using the Cloud API](#)
- You have integrated your StarLeaf account with Okta, OneLogin, and Azure AD for user synchronization. In this case, the integration will add users to your account and although you can view them in the Portal, you cannot edit users there. For more information, refer to [Integrating with Okta](#)
- You have added a user to StarLeaf by creating a user account in the Portal. In this case, the user will receive an activation email which tells them how to download the app

Adding user information in the Portal

Note: Users can add themselves to the organization by downloading and signing into the StarLeaf app. Where you need to add users with non-matching email domains to your organization, follow the procedure below.

To add a user:

1. Go to **Users > Add user**.

2. Provide the following user information:

- **Email address:** A user's email address is the unique identifier for that user. The user receives an activation email to this email address. The user is not able to change the email address and uses it to log in to the Portal to create scheduled meetings. The email address is a video address that any other StarLeaf user can dial to reach this user
- **First and Last name:** A user's first and last name are displayed on the StarLeaf device. The names are also used in the directory, in voice and videomail, and when inviting people to meetings and in invites to use StarLeaf app
- **Optional contact details:** Mobile, Work, and Home numbers. If specified, these appear in the company address book. It is useful to add cell numbers because

when you join a StarLeaf scheduled conference from your mobile phone, StarLeaf will recognize you and your name will automatically display

- **Enable video mail:** Select if this user has access to voice and video mail
- **Administrator for this organization:** If enabled, this user has administrator privileges including the ability to add and edit users, view the details of all meetings, call detail records, etc
- **Optional overrides for language and time zone.** You configure the default language and time zone on the [Edit organization page](#). Changing the language in the Portal does **not** affect the StarLeaf app. The app copies the language settings of the user's device (mobile or desktop). Note that the time zone setting is used for StarLeaf devices and for StarLeaf voice and video messages

Note: Connection from your StarLeaf endpoints to the public telephone network is an optional extra customization. For more information, contact your StarLeaf representative.

Provisioning users

Provisioning a user means that you allocate a user with an endpoint or endpoints. This may or may not include the StarLeaf app.

You can provision endpoints on the [Add/Edit user](#) page.

Provisioning a user with StarLeaf

Note: Starting in March 2019, all organizations using Breeze will gradually be upgraded to StarLeaf app, and Breeze will no longer be usable (on Windows and macOS). For the best experience with messaging, meetings, and calling, we recommend that you download [StarLeaf app here](#) before the upgrade happens.

Users can simply download the app. The organization's settings include email domains and this means that anyone signing into the StarLeaf app using an email domain associated with the organization will be added to the directory and will be able to simply call and chat with other users in the organization.

You can also add users through the Portal. By default, users added in this way receive an account activation email with instructions for that user to activate their account. During the account activation, the user is provided with download instructions for StarLeaf app. You can disable the sending of activation emails (go to [Edit organization](#)). Note that you can add users with non-matching email domains to your organization by adding them through the Portal.

Provisioning a user with a StarLeaf Endpoint

1. For **Type**, select a device in the dropdown list or if you are deploying a Phone 2220, choose *Phone 2220*.
2. Choose whether or not to send this user their account settings by email.

▼ Hardware endpoint

Device selection	Device information
Type <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> StarLeaf GT Mini 3330 or GT 3351 ▼ </div> <input type="checkbox"/> Conference Phone 2220	Quick-connect code Press Apply to generate
Basic settings	
<input type="checkbox"/> Don't send settings email	
<input type="checkbox"/> Enable notifications	

Note: If provisioning a StarLeaf Group Telepresence device for a meeting room, refer to [Provision Group Telepresence \(p1\)](#).

3. Click **Apply** to submit the configuration changes. StarLeaf generates a unique QuickConnect code for this user.

When the user enters the QuickConnect code on the StarLeaf controller or phone, the endpoint serial number is displayed on this Portal page.

Note: The **Advanced** settings for both StarLeaf app and hardware endpoints concern bandwidth capping and you should not alter these settings under most circumstances. Refer to the online help in the Portal for more information. Also note that the **Advanced** settings are not available to all organizations.

For information about hardware installation, refer to installation guides available on www.starleaf.com/documentation.

Removing an endpoint from a user profile

To disassociate a StarLeaf endpoint from a given user, set user endpoint **Type** to *None* and click **Apply**. Disassociating an endpoint from a user returns the endpoint to its factory default settings.

Conferencing

- **Layout for QuickMeet conferences:** Choose the conference layout that this user uses when creating a QuickMeet (ad hoc) conference. Conference layouts are described later in this guide

View user status

User status is displayed on the [Users](#) page.

Ext.	First name	Last name	Email address	StarLeaf apps	Hardware endpoint
2101	Alexis	Reena	alexis.reena@xampleco.com	✓ Online	✓ StarLeaf Personal (Online)
2102	Trudie	Doriane	trudie.doriane@xampleco.com	✓ Online	✓ StarLeaf Personal (Online)
2103	Maya	Kiran	maya.kiran@xampleco.com	✗ Offline	✓ StarLeaf GT Mini 3330 or GT 3351 (Online)
2104	Milan	Sylvain	milan.sylvain@xampleco.com	✗ Offline	⊘ None

Admin users are indicated by this icon:

Your landing page displays live status information for StarLeaf app and hardware endpoints:

- **Online:** provisioned and connected
- **Offline:** provisioned but not connected
- **Disabled:** not provisioned
- **None:** not provisioned

The type of hardware endpoint is listed (StarLeaf Personal, StarLeaf Phone 2105, H.323, or StarLeaf GT Mini or GT), along with the state of the endpoint (online or offline).

View endpoint connection status

To view connected endpoint information, go to the [Edit user](#) page for the user.

- StarLeaf app status is displayed within the [StarLeaf apps](#) section
- Hardware endpoint status is displayed within the [Hardware endpoint](#) section

StarLeaf app status

Device Type	Status	Timestamp	Version	Connection	Speed test up	Speed test down	CPU rate up	CPU rate down
Android	✘ Offline	Wed, May 4, 4:53 PM	1.6.15	UDP tunnel: • public IP 107.107.184.205 • device IP 169.254.0.1	>2000 kbit/s	>2000 kbit/s	384 kbit/s	448 kbit/s
OS X	✔ Online	Thu, May 5, 6:33 AM	1.6.7	UDP tunnel: • public IP 173.15.139.217 • device IP 10.0.0.194	>2000 kbit/s	130 kbit/s	>2000 kbit/s	>2000 kbit/s

This table shows the details of the StarLeaf app connections. It shows up to the four most recent connections, one for each different device used. The timestamp shows the time that the device came online or went offline. The table also shows the public and private IP address from which the StarLeaf app has connected. Any problems with the connections are also shown, to help with fault-finding. The table tells you whether or not the device is currently online and the results of the speed test indicating any limitations on the rate of calls either due to the network or due to the CPU of the connecting device.

Hardware endpoint status

Status	Timestamp	Connection	Speed test up	Speed test down
✔ Online	Thu, May 5, 7:07 AM	UDP tunnel: • public IP 81.144.219.130 • device IP 10.0.0.230	>2000 kbit/s	>2000 kbit/s

This table shows the details of the device connection. If the device has ever connected, it shows the most recent connection information. Any problems with the connection are also shown, to help with fault-finding.

The connection is one of UDP, TCP, SL-TCP, H.323 without H.460, or H.323 with H.460. For StarLeaf endpoints, UDP is preferred. Refer to the Knowledge Base at support.starleaf.com for more information.

The table tells you whether or not the device is currently online and the results of the speed test. The timestamp shows the time that the device came online or went offline.

Note: This same information is available for Group Telepresence systems that have been configured as **Room systems**.

Delete a user

Admins for an organization can delete a user, which removes the user from the Portal, and deprovisions any endpoint currently assigned to them. Users with admin status are

denoted by the  icon next to their name.

To delete a user, go to the **Users** page and press the delete button to the right of the specific user. This action is permanent and cannot be undone. If you mistakenly delete a user, you need to create them again by following the instructions to [Create a user account \(p10\)](#).

Deprovision a user

If, however, you don't want to permanently delete a user, you can deprovision any devices from their account instead. This retains the user on the Portal but deprovisions any desktop video associated with them and prevents them from using StarLeaf app. To deprovision a user:

1. Go to **Users > Edit User**.
2. Under the **Breeze** dropdown, specify whether they have access to Breeze by enabling or disabling the **Allow Breeze** checkbox.
3. Under **Hardware endpoint** dropdown, set the **Device selection Type** to **--NONE--**.
4. Click **Apply**.

This disassociates the endpoint from that user and resets the endpoint to its factory-default settings. The endpoint now shows the QuickConnect code screen on the display.

If you want to add a device to this user again, whether the same device or a new one, you can follow the instructions for provisioning in [Create a user account \(p10\)](#).

Check the user status at any time to see what endpoints have been assigned to them. Refer to [View user status \(p14\)](#) for more information.

About the directory

As you add users to the organization, the Cloud automatically adds them to the company directory. In addition, you can configure other directory entries.

Your directory (address book) can contain any contact details that it is useful for you to have in your directory. Clearly, this includes video addresses of partners, but might also include contacts' telephone, email, and cell (mobile) details.


Note: Connection from your StarLeaf endpoints to the public telephone network is an optional extra. For more information, contact your StarLeaf representative.

Editing the directory

To edit the directory:

1. Select **Directory entries** from navigation menu.

First name	Last name	Work number	Home number	Cell number	Auto
StarLeaf Demo		demo@starleaf.com			Yes
StarLeaf Support		support@starleaf.com			Yes
James	Joyce	joyce@starleaf.com			No

2. Select  to add new directory entry.
3. Fill out contact entry details:
 - **First** and **Last name**
 - **Work, home, and/or Cell** number or address
A contact address can be an IP address, a URI, or a PSTN number
4. Click **Apply** to submit any changes.

Note: By default, the first two directory entries are support contacts. So long as you do not edit or delete these entries, they remain as **Auto** entries and can be updated by Cloud upgrades. StarLeaf recommends you add in the numbers of an internal support person, and the technical support contact of your reseller. Directory entries that you make yourself are not affected by Cloud upgrades.

Hiding users from the directory

It is possible to hide users in the directory. You can choose whether individual users will appear in the directory or not. By default, every user will appear in the directory. To hide a user from the directory:

1. Go to **Edit user**.
2. Scroll down to **Dialing details** and uncheck **Show in address book**.

Localization of StarLeaf endpoints, apps, and Portal

StarLeaf app

The StarLeaf app copies the user's device language setting. For example, if your desktop language is set to French, the desktop app will also set its language to French.

Note: If your device is set to a language which is not yet available in the StarLeaf app, the language defaults to English (US).

Available languages in the StarLeaf app include the following (A-Z):

Chinese (Simplified)	Italian
Chinese (Traditional)	Japanese
Czech	Norwegian (Bokmål)
Danish	Polish
Dutch	Portuguese (Brazil)
English (US)	Slovakian
Finnish	Spanish
French (France)	Swedish
German	

StarLeaf Portal

StarLeaf Cloud also provides localized emails and end-user pages in the StarLeaf Portal:

- meeting invite emails
- guest user invite emails
- app activation emails
- My profile page on the StarLeaf Portal
- Meetings page on the StarLeaf Portal

StarLeaf Cloud provides these Portal pages and emails in multiple languages, including the following (A-Z):

Chinese (Simplified)	German
Chinese (Traditional)	Italian
Czech	Japanese
Danish	Portuguese (Brazil)
Dutch	Spanish

English (US)	Swedish
French (France)	

When a user changes their language via the Portal, or when the administrator changes users' language settings, the affected users need to log out of the Portal and log in again to see the new language.

Changing the language in the Portal does **not** affect the language setting in the StarLeaf app.

For emails, the email is sent in the language of the inviter, unless the StarLeaf Cloud knows the language of the receiver, in which case the email is in the correct language for the receiver of the email.

StarLeaf endpoints

StarLeaf endpoints have localizable user interfaces. Available languages include the following (A-Z):

Chinese (Simplified)	German
Chinese (Traditional)	Italian
Czech	Japanese
Danish	Korean
Dutch	Norwegian (Bokmål)
English (US)	Polish
Finnish	Portuguese (Brazil)
French (France)	Spanish
French (Canada)	Swedish

The language for an endpoint is controlled by the StarLeaf Portal. For example, when a user or administrator changes the language for a user or room system in the Portal from English to French, the language on the endpoint will automatically change from English to French.

For more information about editing your profile or your organization's account in StarLeaf Portal, see [Edit your own profile \(p8\)](#) and [Edit your organization's account \(p4\)](#).

Note: There is currently no localization available on the StarLeaf Phone 2105.

Legal information

Third party software acknowledgments

Acknowledgments of third-party software are available at:

www.starleaf.com/support/legal

Disclaimers and notices

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