

# StarLeaf Scheduler for Outlook Exchange Server

User Guide

11 July 2019

# StarLeaf Scheduler for Outlook Exchange Server

The StarLeaf Scheduler for Outlook Exchange Server is an add-in that allows Outlook users in an organization to schedule StarLeaf video meetings directly from their Outlook client. The scheduled meeting is visible, but not editable, on the StarLeaf Portal.

You can invite any other StarLeaf user or meeting room system to your meeting. You can also invite anyone else and they can join the meeting from their browser or by using their own video conferencing system or phone.

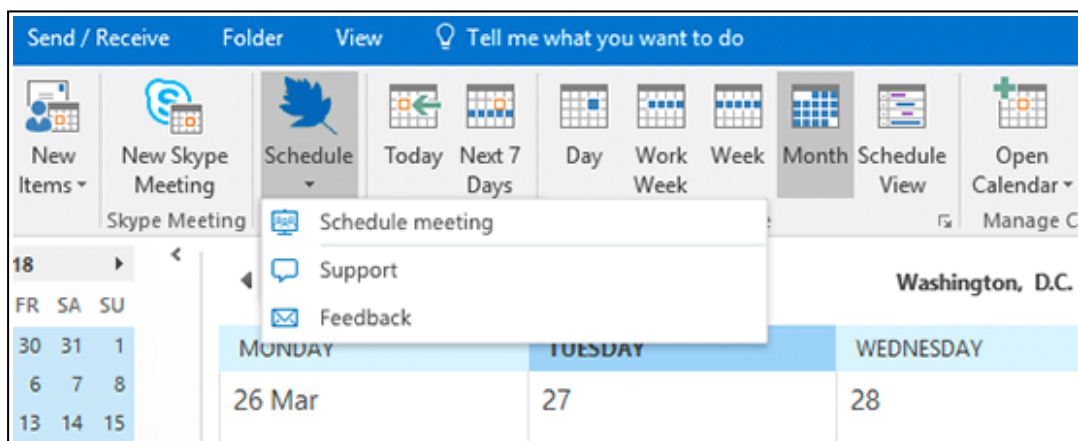
If you do not yet have a StarLeaf account, ask your administrator to create one or [download the StarLeaf app](#) and sign up.

The StarLeaf Scheduler for Outlook Exchange Server supports Microsoft Outlook 2010, 2013, and 2016.

## Installing the StarLeaf Scheduler

1. Download the StarLeaf Scheduler from [here](#).
2. Run the downloaded file and follow the onscreen instructions.
3. Restart Outlook and open your calendar.

There is a new StarLeaf button in the Outlook ribbon:



## Using the StarLeaf Scheduler

To use the StarLeaf Scheduler for Outlook Exchange Server, you must have a StarLeaf account. When you select the StarLeaf Scheduler button **for the first time**, the result may vary for different users.

To learn more, select the case below that best applies to you.

## StarLeaf is installed and you are signed into your account

The StarLeaf Scheduler uses your credentials from when you signed into the StarLeaf app for Windows, and there is no need for any additional sign in.

## StarLeaf is installed but you are not signed into your account

The StarLeaf app launches and you will be prompted to sign in. The StarLeaf Scheduler then uses your credentials automatically, and there is no need for any additional sign in.

## StarLeaf is installed but you do not have a StarLeaf account

The StarLeaf app launches and you will be guided through a short process to create your StarLeaf account. For more information, go to [Signing into the app](#).

After this, the StarLeaf Scheduler for Outlook Exchange Server can use your StarLeaf credentials automatically, and there is no need for any additional sign in.

## StarLeaf is not installed and you do not have a StarLeaf account

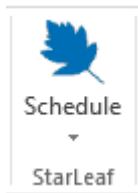
You are prompted to download the StarLeaf app and create your StarLeaf account. For more information, go to [Signing into the app](#).

After this, the StarLeaf Scheduler for Outlook Exchange Server can then use your StarLeaf credentials automatically, and there is no need for any additional sign in.

## Scheduling a StarLeaf meeting

To schedule a new StarLeaf meeting from your Outlook calendar:

1. Select the StarLeaf Scheduler button on your Outlook calendar.

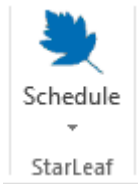


2. Select **Schedule meeting** from the dropdown.  
The StarLeaf Scheduler automatically checks your StarLeaf credentials. A new invitation appears. The invitation text is prepopulated with information about how to join the meeting.
3. Edit and complete the invitation fields.
4. Select **Send**. A meeting invite is sent to all participants.

## Tips

- You can invite meeting room systems to the video meeting. StarLeaf meeting room systems display a **join** button making it very easy for people to join their video meeting

- If you later want to update any of the meeting details (e.g. change the time of your meeting), you can do so by editing the meeting details in your Outlook calendar. All participants receive email updates
- To cancel a meeting, find the meeting details in your Outlook calendar and select **delete**. All participants receive email updates
- To convert a regular Outlook meeting into a video meeting, open the meeting details and select **schedule**:



- Outlook 2010: If you are using this version of Outlook, and you create a repeating conference, you cannot later edit a single occurrence of that conference

## Where to find more information or get help

For information about using StarLeaf products, refer to the documentation available in the StarLeaf [Knowledge Center](#).

You or your reseller can get help by raising a case with StarLeaf Technical Support.

# StarLeaf Scheduler for Outlook Exchange Server: admin guide

The StarLeaf Scheduler for Outlook Exchange Server is an add-in that allows all Outlook users in an organization to schedule video meetings directly from their Outlook client.

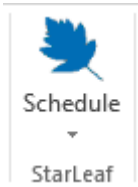
Users install the StarLeaf Scheduler on their Windows computer or you can mass-deploy the StarLeaf Scheduler.

The StarLeaf Scheduler allows users to schedule meetings from Outlook. The meeting invitations are pre-populated with the correct dial-in details for the video meeting and with invitation text. This invitation text is customizable.

The StarLeaf Scheduler for Outlook Exchange Server supports Microsoft Outlook 2010, 2013, and 2016.

## Tips

- You can invite meeting room systems to the video meeting. StarLeaf meeting room systems display a **join** button making it very easy for people to join their video meeting
- If you later want to update any of the meeting details (e.g. change the time of your meeting), you can do so by editing the meeting details in your Outlook calendar. All participants receive email updates
- To cancel a meeting, find the meeting details in your Outlook calendar and select **delete**. All participants receive email updates
- To convert a regular Outlook meeting into a video meeting, open the meeting details and select **schedule**:

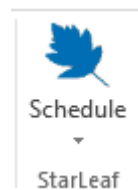


- Outlook 2010: If you are using this version of Outlook, and you create a repeating conference, you cannot later edit a single occurrence of that conference

## Installing the StarLeaf Scheduler

### Installing the StarLeaf Scheduler on a computer

1. Close Outlook on your computer.
2. [Download the StarLeaf Scheduler from here.](#)  
Clicking the link starts the download automatically.
3. Run the file you have downloaded and follow onscreen instructions.
4. Restart Outlook. A new option appears on the Outlook ribbon:



## Mass-deploying the StarLeaf Scheduler for Exchange Server

StarLeaf provides an MSI installer for the StarLeaf Scheduler.

The MSI installer can be used with Microsoft deployment tools to mass deploy the StarLeaf Scheduler to a group of users.

By default the StarLeaf Scheduler installer installs to a single user profile in Windows.

Optionally, you can use the **ALLUSERS** flag to control this behavior:

- **ALLUSERS=0** This is the recommended default and installs to a single user. The StarLeaf Scheduler automatically upgrades in this case
- **ALLUSERS=1** This causes a machine-wide install and in this case, auto upgrade is disabled. You need to manually push upgrades to your users

## How to integrate the StarLeaf Scheduler with your room calendar

If you use Outlook Calendar to schedule meeting rooms, it is useful to integrate that with the StarLeaf Scheduler. This means that when a user schedules a video meeting, and books a meeting room, the **join** button on the meeting room system in that room will automatically light up when the meeting is due to start. To do so:

1. Contact StarLeaf technical support to enable this feature for your organization.
2. For each meeting room system, go to **Edit room system** and enter the **Email address** that the Outlook system associates with that meeting room.

Edit room system

▼ Meeting room

Name:

Email address:

Enable video mail:

Now, when users choose this meeting room for their video conference (in **Outlook > Schedule**), the **join** button will light up to enable participants to join the meeting with one press.

## How to customize the invitation text

The StarLeaf Scheduler for Outlook Exchange Server pre-populates an invitation with text from the **footer.rtf** file, which it finds in the directory on each user's PC:

**C:\Users\\AppData\Local\StarLeaf\StarLeaf Scheduling**

**footer.rtf** supports text with text formatting and can contain images.

The footer file can contain any text along with special tags. These tags are used as place holders, which the StarLeaf Scheduler replaces with conference specific information. The tags are described in the table below:

Tag	Description
<formatted_access_code>	A URI that a participant could dial to join the conference using a StarLeaf endpoint.
<dial_standards>	A URI that a participant could use to join the conference using a standards-based (H.323 or SIP) endpoint.
<access_code_pstn>	The access code required by participants who dial in from the PSTN (audio-only telephone).
<local_pstn>	A PSTN number, which is either a relevant PSTN number based on the user's location, or a default PSTN number.
<mobile_pstn_dial>	A formatted mobile PSTN number which is clickable.
<dial_info_url>	A link to a web page that provides all the relevant dialing information for a conference.
<dial_info_url_pstn>	A link to the web page with the PSTN tab selected by default.
<skype_info_url>	A link that a Skype for Business user can use to launch Skype for Business and join the conference.
<webrtc_link>	A link that launches a browser so that the user can join the conference from the browser.
<user_text>	The text of an existing meeting that will not be formatted when StarLeaf is added to the meeting afterward. The message body contains this text.

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**Note:** If you are editing the footer.rtf in Microsoft Word and you want to embed links (rather than putting the whole hyperlinked address in the text) you must URL-encode the tag. For example, instead of <dial\_info\_url> the hyperlink should be set to %3cdial\_info\_url%3e. This is shown in the [example footer.rtf](#).

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## Example footer.rtf

To download an example **footer.rtf** file click [here](#). Clicking the link starts the download automatically.

## How to deploy the customization

1. Design your footer files.
2. Test the files on a test client PC.
3. Deploy to your users. Either:
  - each user simply places the footer files in the appropriate directory
  - you can deploy the footer files using centralized management software

## Proxy support

StarLeaf Scheduler for Outlook Exchange Server supports connection through proxies. The add-in supports the **HTTP-CONNECT** proxy protocol and it uses the proxy configuration from a user's Internet Explorer proxy settings. The add-in supports all HTTP proxies that Internet Explorer supports. For scheduling meetings, the add-in communicates with [api.starleaf.com](http://api.starleaf.com).

## Release notes

### Version 1.3.1d1

ID	Description
<b>21625</b>	When you edit an invitation by adding a new participant to the invitee list, you now receive the option before sending the update of whether you want to send it to all participants or just the new participant
<b>21748</b>	The <b>Video URI</b> now appears as expected in the text of a customized invitation (from a footer.rtf)

### Version 1.3.0.d5

ID	Description
<b>20100</b>	When you customize the text of an Outlook meeting and subsequently make it a StarLeaf meeting, your text is no longer erased*. This can also be done with a tag in custom footers. For more information about customizing the invite text, go to <a href="#">StarLeaf Scheduler for Outlook Exchange Server: admin guide (p5)</a> *Known limitation: original formatting is removed
<b>19879</b>	StarLeaf can now enable user log in within the password-less authentication flow if required by an organization
<b>12825</b>	Multiple dial-in numbers per country are now provided in the meeting invite



## Version 1.2.0.1018

ID	Description
21065	The scheduler does not require you to log in with a username and password. However, if you force a log in with your username and password, the scheduler will fail to perform any StarLeaf operations if Outlook is left open for more than an hour. If you wish to continue logging in with a username and password, you can resolve this issue if you close and reopen Outlook. This fix will be rolled out over the coming weeks (from 5 April 2019)

## Version 1.2.0.1015

ID	Description
19851	Bug fix and improvement to the process of editing one meeting in a series of recurring meetings when the privacy setting is enabled. This fix will be rolled out over the coming weeks (from 15 February 2019)
20210	Under certain circumstances, if the scheduler was mass-installed using the MSI installer, a request to install the StarLeaf app could appear when you launch the scheduler even if the StarLeaf app is already installed. Cloud 8.7 fixes this issue and this will be visible in the coming weeks (from 15 February 2019)

## Version 1.2.0.1004

ID	Description
11867	If you are a StarLeaf app user, you no longer need to enter your username and password to use the StarLeaf Scheduler for Outlook Exchange Server. The scheduler automatically uses the credentials from when you signed into StarLeaf

## Version 1.1.10

ID	Description
18278	When you schedule a meeting using the add-in, the local PSTN number that can be used to dial in now appears in the meeting invite text

## Version 1.1.9

ID	Description
17571	In previous versions, some organization security settings do not allow the add-in to launch correctly in Outlook. Version 1.1.9 updates the signing of the add-in and fixes this issue

ID	Description
18214	In previous versions, under certain circumstances, the add-in asks users to log in after a period of inactivity. Version 1.1.9 fixes this issue

## Version 1.1.8

Description
General improvements

## Version 1.1.6

ID	Description
17411	In the previous release, when a user creates or updates a meeting, the add-in can sometimes take a long time to respond and return an error saying it failed to create/update the meeting. Version 1.1.6 fixes this issue

## Version 1.1.5

ID	Description
16953	In the previous release, the quiet option of the MSI installer still causes some notifications for the user. Version 1.1.5 fixes this issue

## Version 1.1.4b6

ID	Description
16109	In the previous release, when a user edits a meeting that was originally created using the add-in, a dialog box sometimes appears advising that no changes have been made to the meeting request. Version 1.1.4b6 fixes this issue

## Version 1.1.4b5

Description
General improvements and bug fixes

## Version 1.1.4b2

ID	Description
12693	In the previous release, some users saw an error message after they were unexpectedly required to log in to the add-in. Version 1.1.4b2 fixes this issue

ID	Description
12862	The user experience for converting an existing meeting into a StarLeaf meeting has been improved

### Version 1.1.3b1

ID	Description
9786	The add-in update message now runs in the background, rather than having the focus and causing users to inadvertently start the update and interrupt their outlook process
10100	The add-in buttons now have explanatory tool-tips
10702	In previous releases, the add-in could interfere with the opening of .msg files. Version 1.1.3b1 fixes this issue
11608	In the previous release, you could get unexpected behavior when attempting to convert a single occurrence of a meeting, where an occurrence of this series has already been edited in Outlook, into a StarLeaf meeting. The behavior now is that the add-in will not allow you to do this
11630	In the previous release, you could not convert a single occurrence of a meeting into a StarLeaf meeting. Version 1.1.3b1 fixes this issue
12041	The add-in will no longer show the error: <b>Custom UI Runtime Error in StarLeaf Scheduling</b>
12569	The add-in now allows the character £ in user passwords
12483	The add-in now updates a series occurrence when dragging and dropping
12862	Converting an existing Outlook meeting into a StarLeaf meeting now behaves as expected

## Where to find more information or get help

For information about using StarLeaf products, refer to the documentation available in the StarLeaf Knowledge Center: [www.support.starleaf.com](http://www.support.starleaf.com)

You or your reseller can get help by raising a case with StarLeaf Technical Support.

## Legal information

### Third party software acknowledgments

Acknowledgments of third-party software are available at:

[www.starleaf.com/support/legal](http://www.starleaf.com/support/legal)

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