



Scheduler for Outlook® 2007/2010

User's Guide

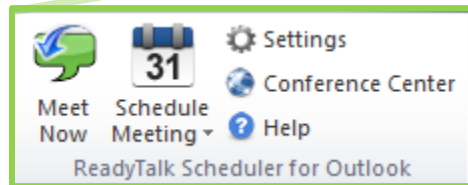
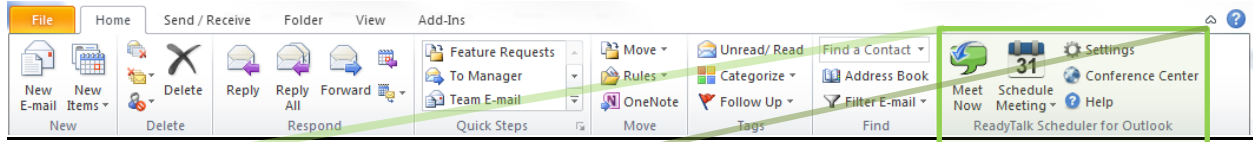
Contents

1. ReadyTalk Scheduler for Outlook 2007/2010	3
2. Download and Installation Instructions.....	4
3. Customize Your ReadyTalk Scheduler for Outlook Settings	9
3.1 Version Update Notification	9
3.2 Default Meeting Preference	10
3.3 Add/Delete Accounts.....	11
3.4 Add / Delete Subscriptions	13
3.5 Subscription Details	14
3.6 Dial-In Numbers.....	15
3.7 Send Invite as Plain Text	17
4. Start a Web Conference Meeting Automatically	18
5. Create a New Meeting Request.....	18
5.1 ReadyTalk Audio and Web Conference Invitation.....	19
5.2 ReadyTalk Audio Conference Invitation.....	21
5.3 ReadyTalk Web Conference Invitation.....	23
6. Customize Your ReadyTalk Scheduler for Outlook Invitation Details	24
7. Uninstalling ReadyTalk Scheduler for Outlook 2007/2010	25

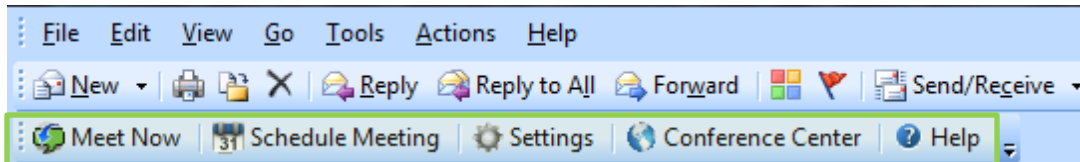
1. ReadyTalk Scheduler for Outlook 2007/2010

The ReadyTalk Scheduler for Outlook 2007/2010 allows you to schedule and start audio and web meetings conveniently from within Microsoft Outlook.

Outlook 2010



Outlook 2007



Features:

- **Meet Now.** Instantly start a ReadyTalk on-demand web conference directly from the Microsoft Outlook toolbar.
- **Schedule an On-Demand Meeting.** Schedule a one-time or recurring on-demand web and/or audio conference using the Microsoft Outlook calendar. The meeting request includes all of the information your participants need to join your conference.
- **Dial-In Number.** Customize the list of ReadyTalk dial-in numbers to include in your Microsoft Outlook meeting request.
- **Audio and Web Conference Details.** Turn web and audio conference details on or off in your calendar invitation with the click of a button.
- **Audio Quick Start for Participants.** Meeting participants now have the option to have your ReadyTalk audio conference call their phone with the click of a link, making it easier than ever to participate in your next on-demand meeting.
- **Open Conference Center.** Quickly access the ReadyTalk Conference Center right from Microsoft Outlook.
- **Manage Multiple Subscriptions.** Set up multiple ReadyTalk subscriptions to allow scheduling for separate access codes, add multiple dial-in numbers and adjust your default meeting type preference directly from the ReadyTalk Scheduler for Outlook.

2. Download and Installation Instructions

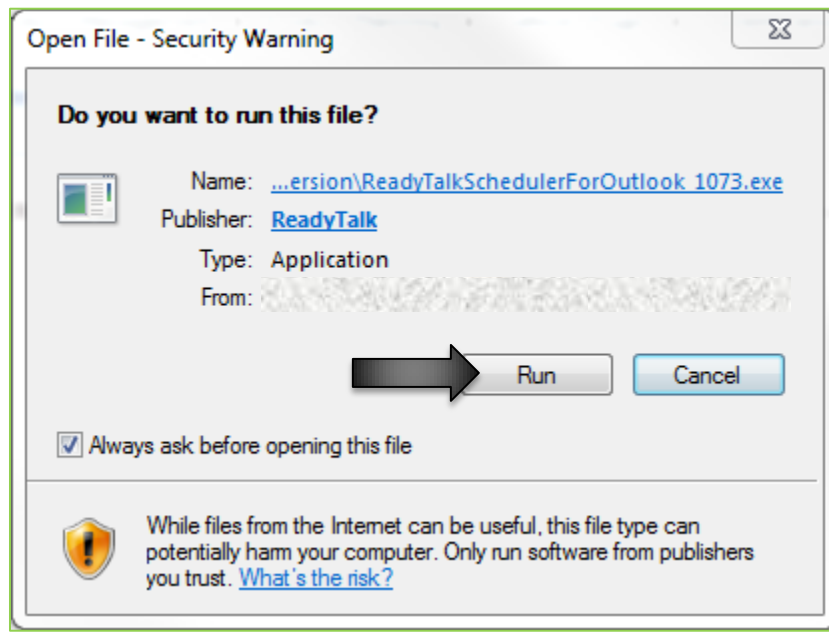
To download the ReadyTalk Scheduler, please visit <http://www.readytalk.com/support-training/downloads> and click **Download ReadyTalk Scheduler for Outlook 2007/2010** under the **ReadyTalk Scheduler for Outlook** section to download the executable installation file.

Important: Before installing a new version of the ReadyTalk Scheduler for Outlook, please **uninstall any previous versions** of the ReadyTalk Scheduler for Outlook you are currently using. Installing a new version of the ReadyTalk Scheduler for Outlook without uninstalling previous versions will result in installation errors.

See [Section 7.0 Uninstalling ReadyTalk Scheduler for Outlook](#) to find instructions on the uninstall process.

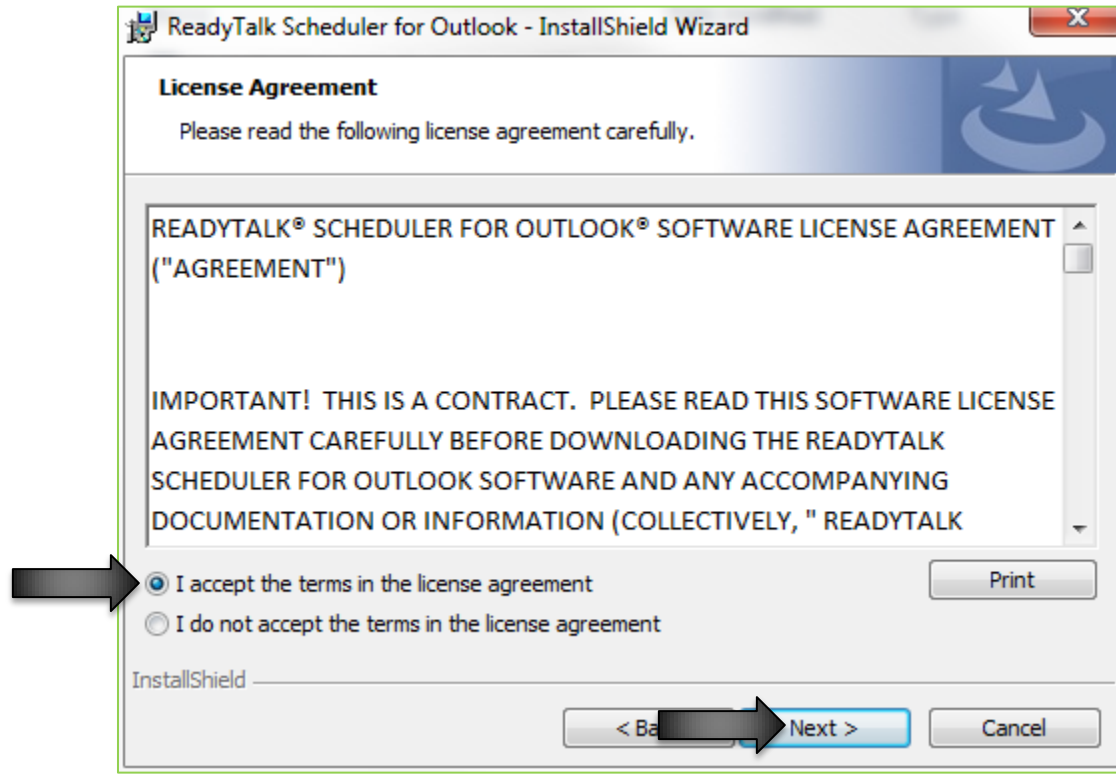
Once downloaded, run the **ReadyTalkSchedulerForOutlook.exe** and follow the installation wizard instructions that appear on your screen.

- A. Depending on your computer's security settings, you may be prompted with a Windows Security Warning. Simply select **Run** from this prompt to continue your **ReadyTalk Scheduler for Outlook** installation.

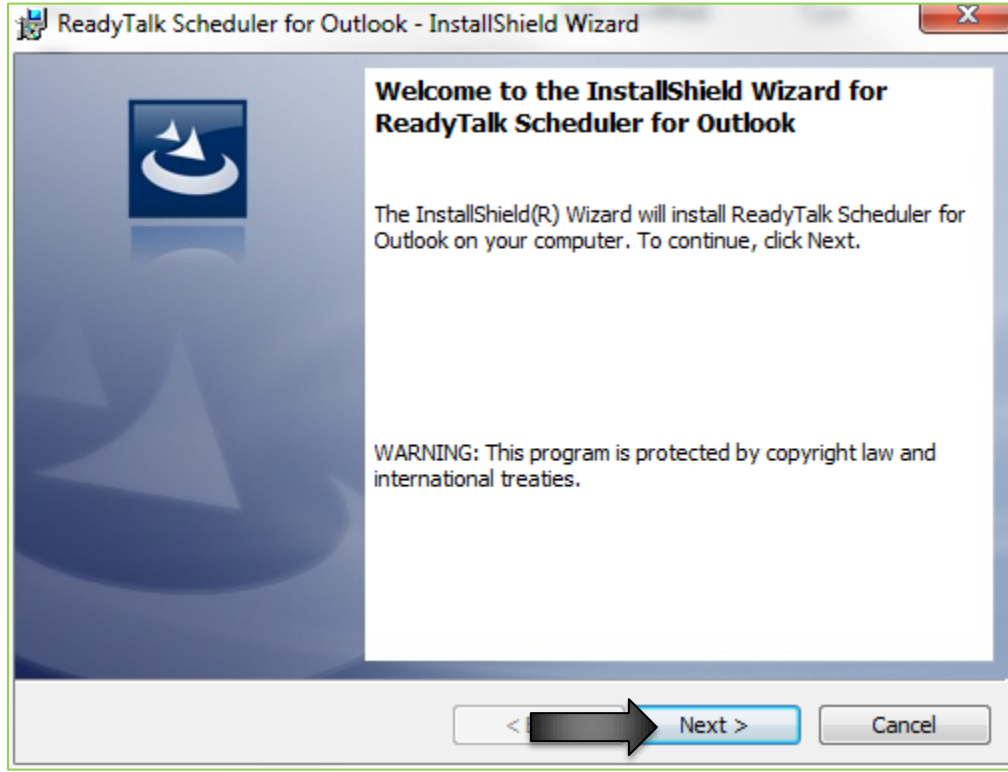


- B. Please read the License Agreement for the ReadyTalk Scheduler. To continue your installation, select **I accept the terms in the license agreement**.

Note: Selecting **I do not accept the terms in the license agreement** will cancel and close your installation.

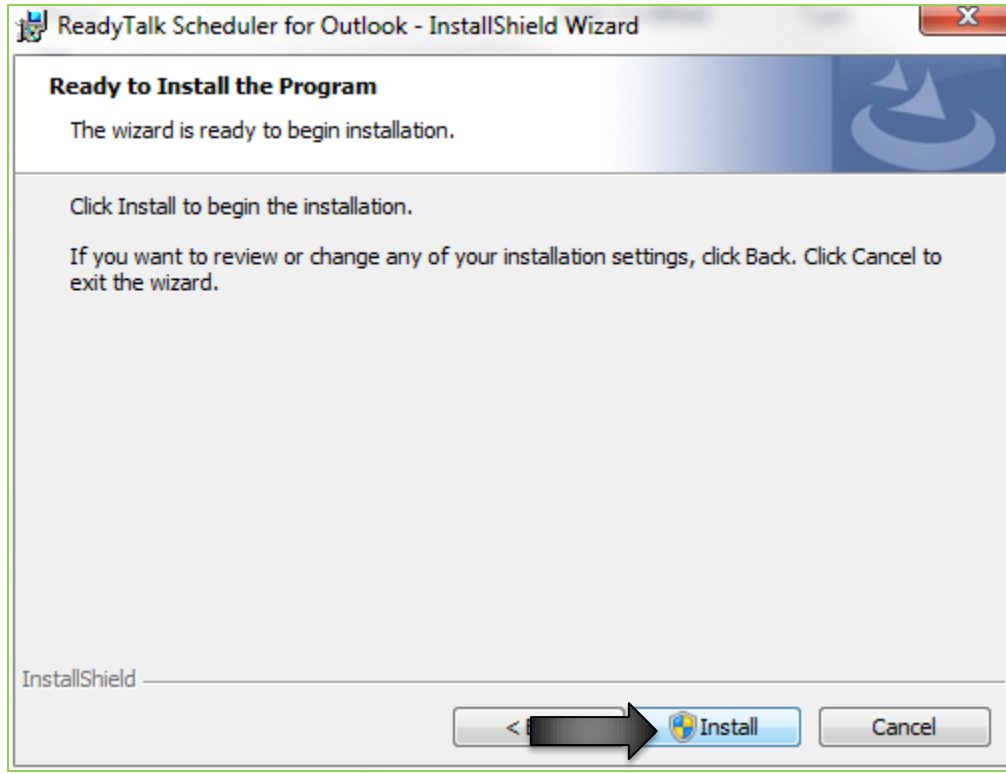


C. Select **Next** to continue your installation.

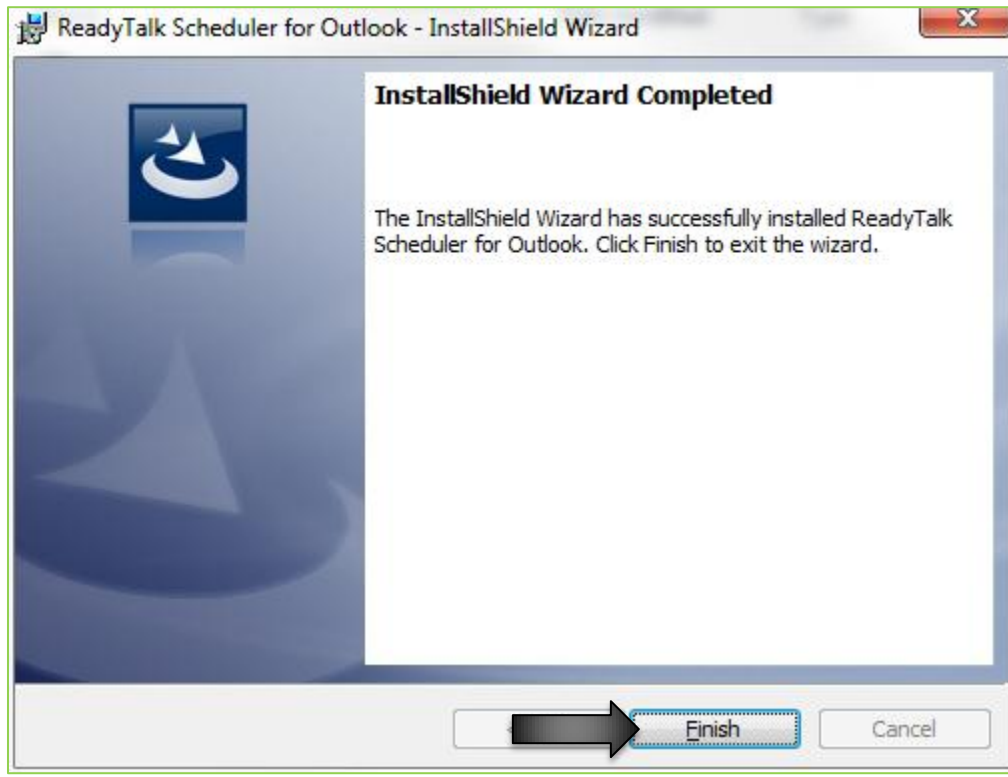


D. Select **Install** to continue your installation.

Note: Depending on the Admin settings for your computer, this step may require you to enter an Administrator login/password.



- E. Once your installation progress bar has completed, select **Finish** to complete the installation of your **ReadyTalk Scheduler for Outlook 2007/2010**.



System Requirements:

- Microsoft Outlook® 2007 or 2010
- Windows® XP (Service Pack 2), Windows Server 2003 (Service Pack 1), Windows Vista, Windows 7 or later Windows operating system.

3. Customize Your ReadyTalk Scheduler for Outlook Settings

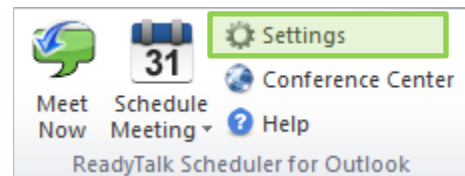
All of the ReadyTalk Scheduler for Outlook settings are preset to default settings. You may change these settings as often as you like. Once implemented, the new settings will apply only to the new conferencing invitations you create from that point on.

If you want to change the content of a specific email invitation, you do not need to change your ReadyTalk Scheduler for Outlook settings. That content may be edited when you create your invitation. Change your ReadyTalk Scheduler for Outlook settings when you want to change the way information auto-populates in your invitations on an ongoing basis.

In Microsoft Outlook, select the **Settings** option on the ribbon. The ReadyTalk Invitation Settings screen will appear. When you are finished making changes to the default settings, select **OK** to apply changes and close the setup screen.

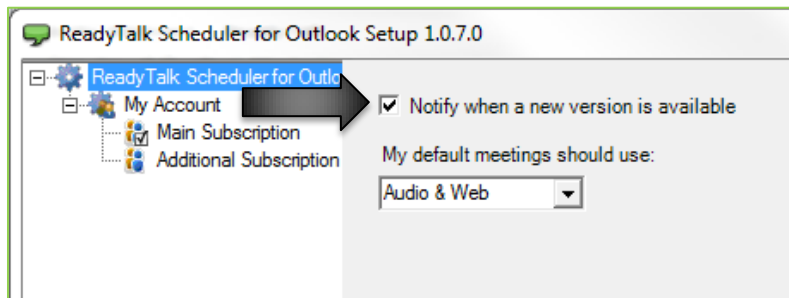
The following features can be customized from clicking on **Settings**:

1. Version Update Notification
2. Default Meeting Preference
3. Add / Delete Accounts
4. Add / Delete Subscriptions
5. Subscription Details
6. Dial-In Numbers
7. Send Invites as Plain Text



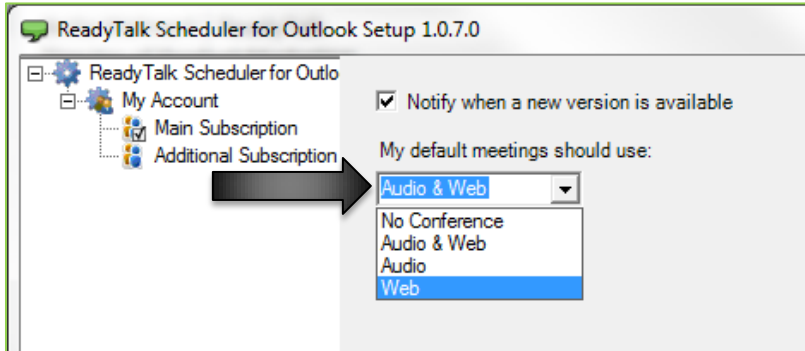
3.1 Version Update Notification

When **ReadyTalk Scheduler for Outlook** is selected, you have the option to select **Notify when a new version is available** if you want to be notified in Outlook when an updated version of ReadyTalk Scheduler for Outlook 2007/2010 is available.



3.2 Default Meeting Preference

When **ReadyTalk Scheduler for Outlook** is selected, you can change the default meeting type for all new ReadyTalk invitations in Outlook. For instance, if you select **Audio**, all Outlook invitations you create will be automatically populated with ReadyTalk **Audio Meeting** details.

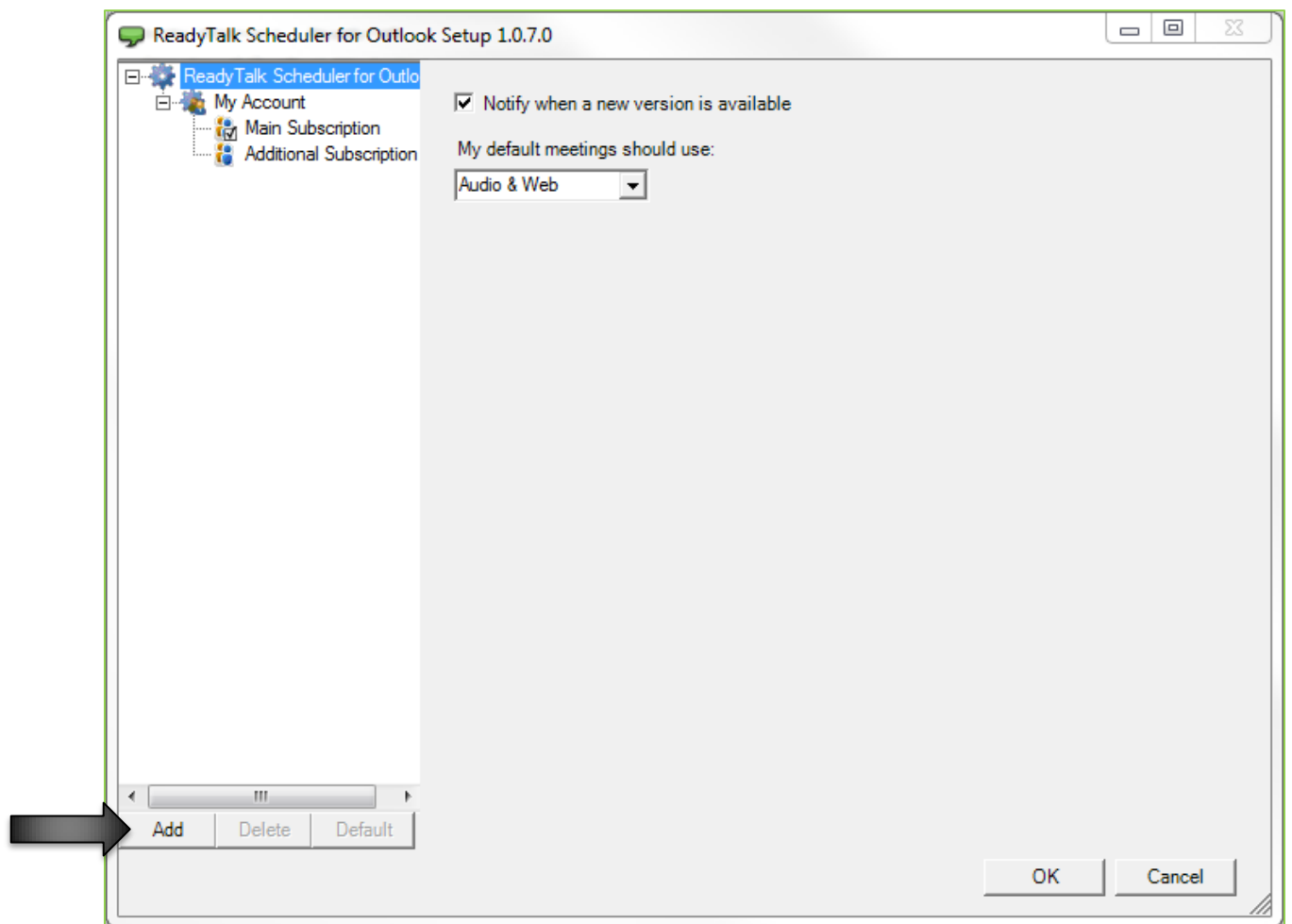


3.3 Add/Delete Accounts

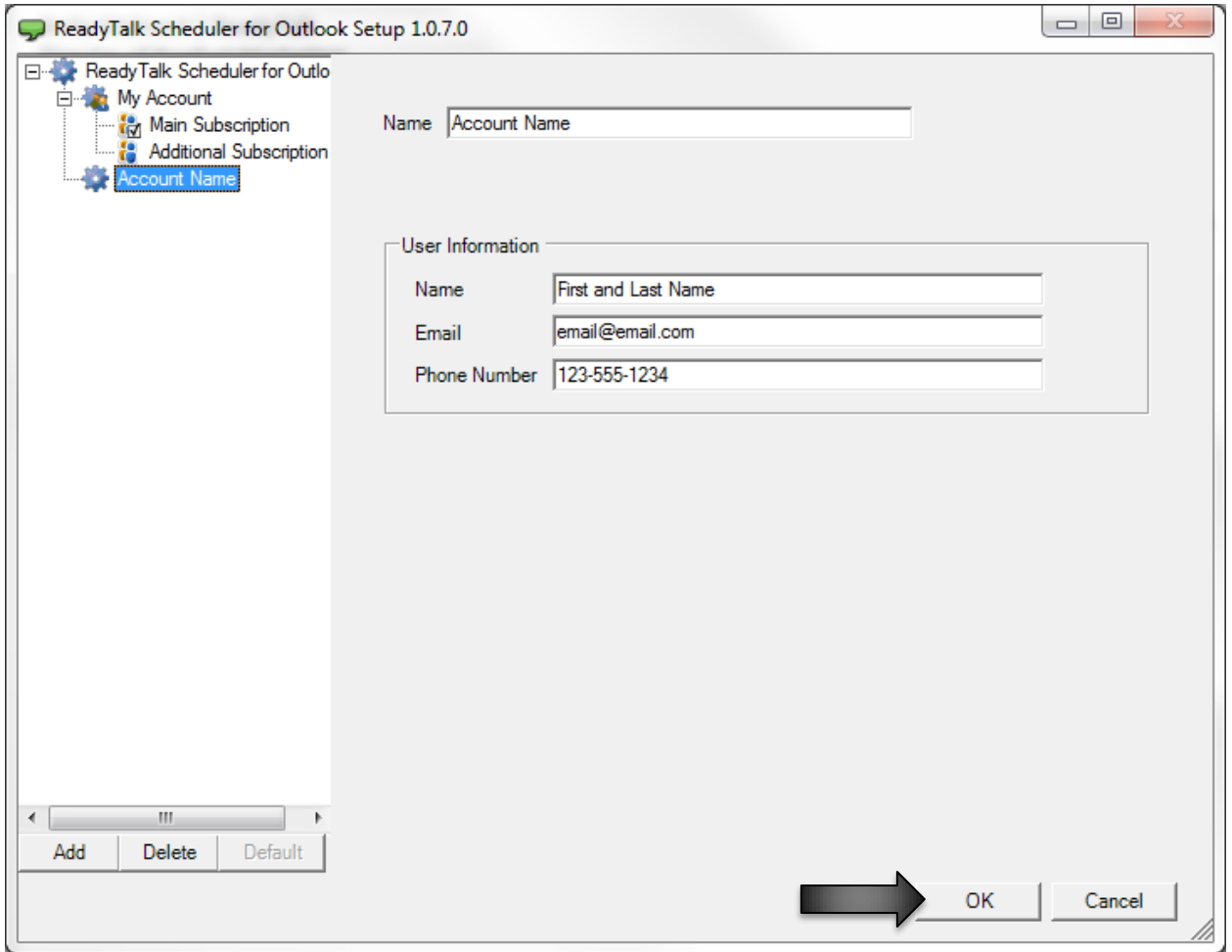
Accounts allow you to manage multiple **subscriptions** (see [Section 3.4 Add/Delete Subscriptions](#)) underneath a singular group. This provides a level of Subscription organization for users managing invitations for multiple ReadyTalk access codes.

When **ReadyTalk Scheduler for Outlook** is selected, you can add more than one ReadyTalk Account to the Scheduler by selecting **Add** at the bottom left corner of the Settings window.

Note: When more than one account is entered, this enables the Subscription Details option (see [Section 6.0 Customize Your Invitation Details](#)) for invites created using the ReadyTalk Scheduler for Outlook.



Provide the name of the account, enter the User Information, and select **OK**. You can delete any unneeded accounts by selecting **Delete** when the account is highlighted.

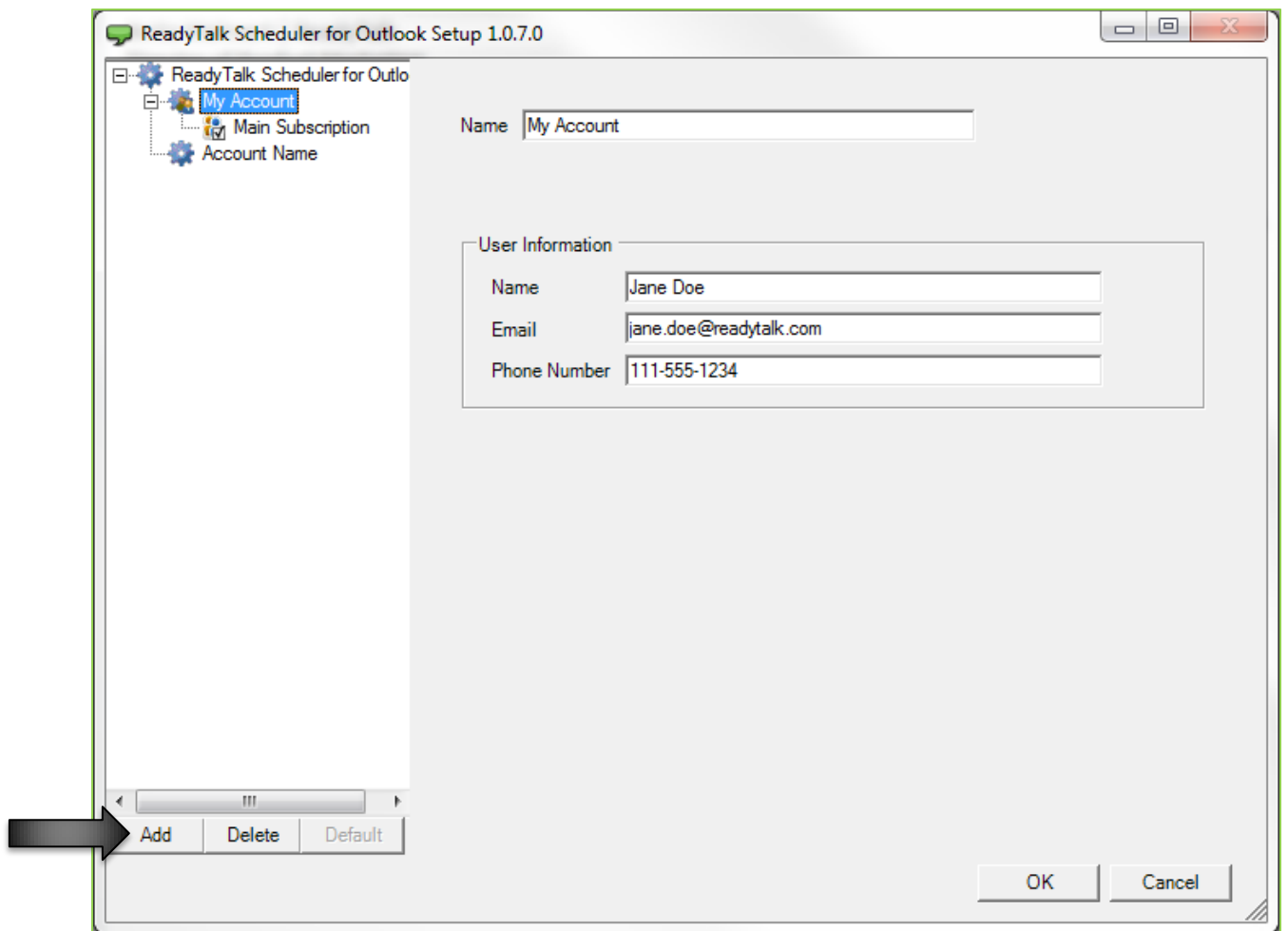


3.4 Add / Delete Subscriptions

Subscriptions allow you to manage multiple ReadyTalk access codes underneath a one or multiple Accounts (see [Section 3.3 Add/Delete Accounts](#)). This provides the ability for a user to manage multiple access codes (one per Subscription) using a singular install of the ReadyTalk Scheduler for Outlook.

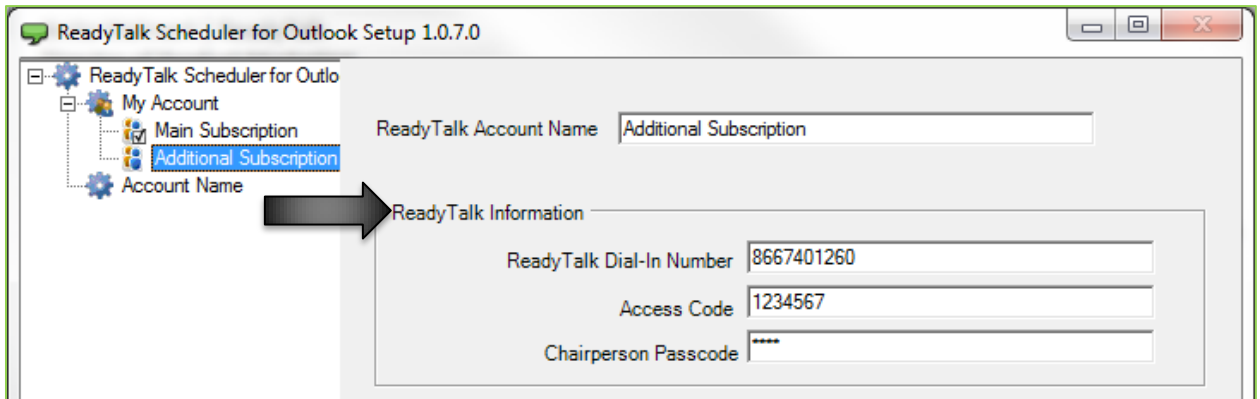
When **My Account** is selected, you can add another subscription by selecting **Add** or delete an existing subscription by selecting **Delete**.

Note: When more than one account is entered, this enables the Subscription Details option (see [Section 6.0 Customize Your Invitation Details](#)) for invites created using the ReadyTalk Scheduler for Outlook.



3.5 Subscription Details

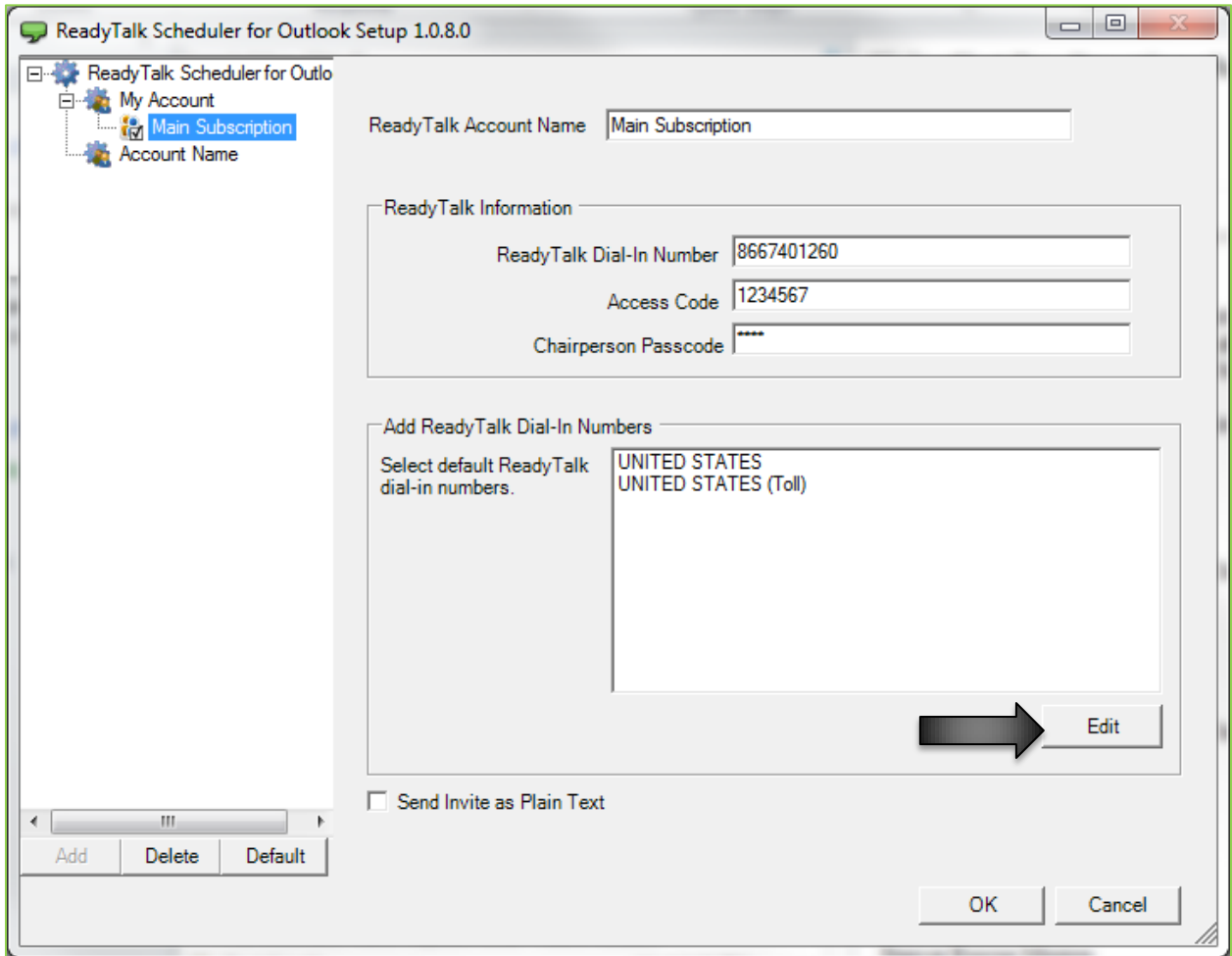
By highlighting a subscription, you can assign a name to your subscription account by changing the **ReadyTalk Account Name** and updating your **ReadyTalk Information** details.



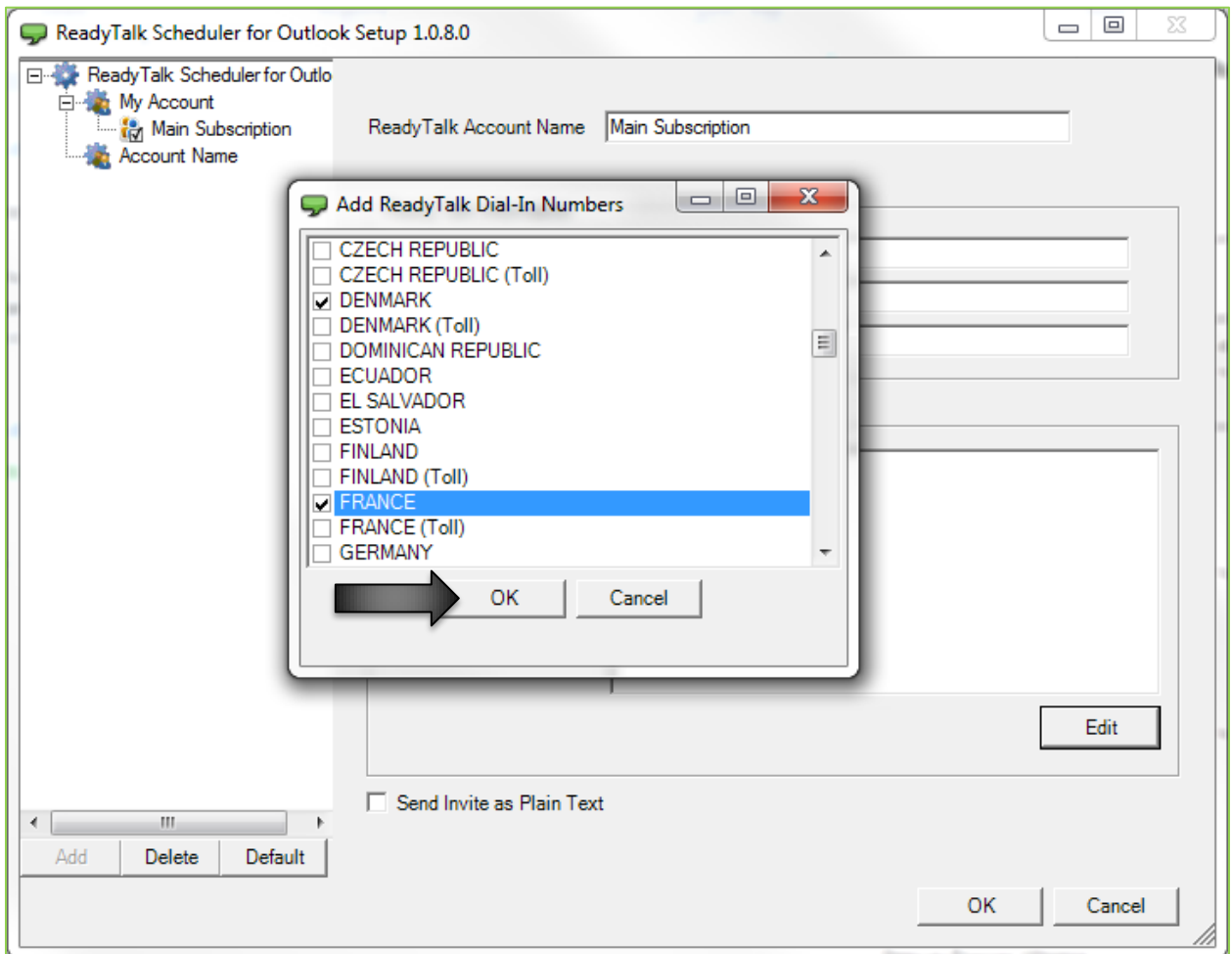
3.6 Dial-In Numbers

To edit the default dial-in numbers that appear in the meeting invitation, select **Edit** to add or remove any specific countries. Changes made here will apply to all new calendar invitations in Outlook.

Note: It is recommended to add at minimum one default Dial-In number as a best practice.

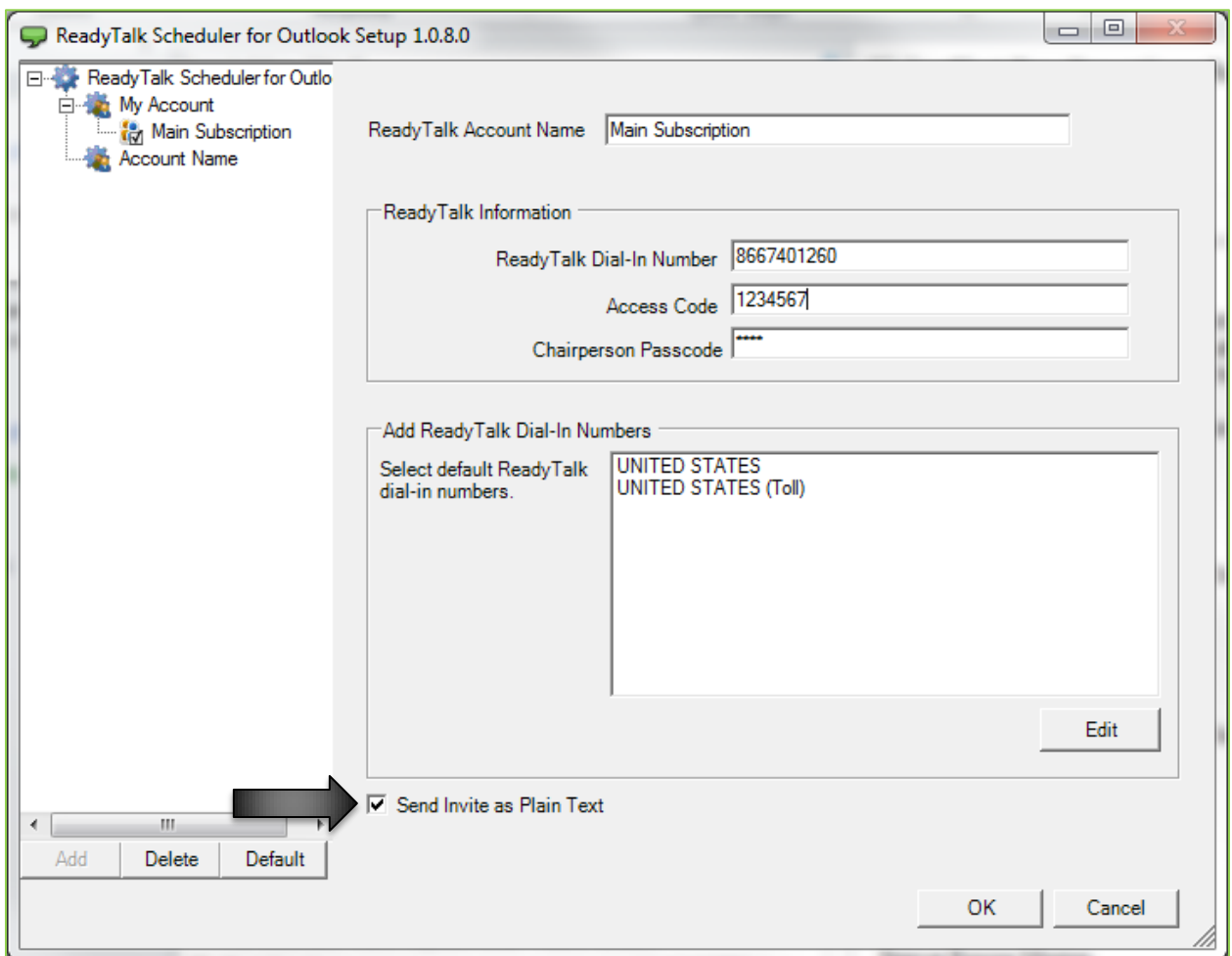


Select desired countries by placing a checkmark next to the country name. Remove any selected countries by unchecking the box next to the country name. To save changes, select **OK**.



3.7 Send Invite as Plain Text

To send a calendar invitation as plain text, place a checkmark next to **Send Invite as Plain Text**.



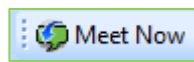
4. Start a Web Conference Meeting Automatically

The ReadyTalk Scheduler for Outlook provides the ability to launch an on-demand ReadyTalk web meeting. The system will automatically log you in and open your ReadyTalk Conference Controls.

Outlook 2010



Outlook 2007



Select the "Meet Now" button on the Microsoft Outlook ribbon to launch an on-demand ReadyTalk web meeting.

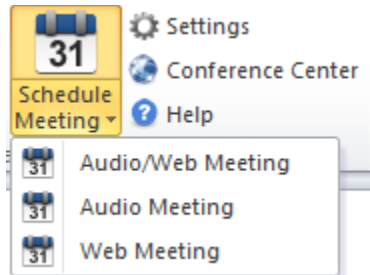
Note: Your account information must be setup in subscription details in order for this feature to work (see [Section 3.5 Subscription Details](#)).

5. Create a New Meeting Request

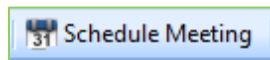
The ReadyTalk Scheduler for Outlook provides the ability to create an Outlook meeting invitation that includes ReadyTalk meeting details with the click of a button.

From the submenu of the **Schedule Meeting** button on your Microsoft Outlook toolbar, you have the option of scheduling the following types of meetings: ReadyTalk Audio/Web Meeting, ReadyTalk Audio Meeting, or ReadyTalk Web Meeting.

Outlook 2010



Outlook 2007



The Meeting Request screen that appears automatically displays all of the information participants need to join your ReadyTalk meeting. You can edit any of the information that appears in the unsent meeting invitation.

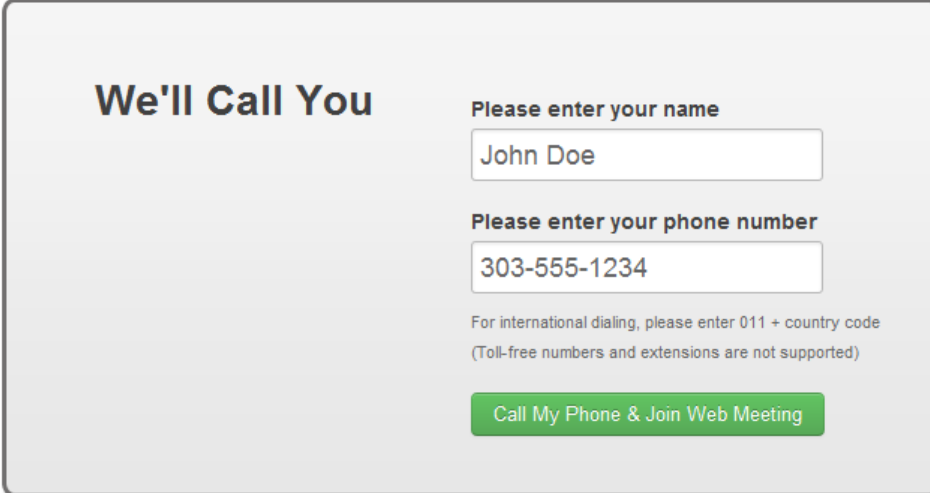
Note: If you make changes to your ReadyTalk Scheduler Setup, updates will not be reflected in previous invitations already sent to conference participants. You must create a new meeting invitation or manually modify the invitation and resend to participants.

5.1 ReadyTalk Audio and Web Conference Invitation

The Microsoft Outlook email invitation for a ReadyTalk **Audio and Web Conference** will include:

- **Call My Phone and Join Web Meeting:** Participants wanting to join your audio and web conference quickly can simply click this direct link to ReadyTalk's audio and web Quick Start form that calls and joins participants to both your audio and web conference.

Below is an example of the ReadyTalk Call My Phone and Join Web Meeting form:



The screenshot shows a form titled "We'll Call You" on a light gray background. On the right side, there are two input fields. The first is labeled "Please enter your name" and contains the text "John Doe". The second is labeled "Please enter your phone number" and contains "303-555-1234". Below these fields is a small note: "For international dialing, please enter 011 + country code (Toll-free numbers and extensions are not supported)". At the bottom right, there is a green button with the text "Call My Phone & Join Web Meeting".

- **Dial-In Numbers:** For participants wanting to join your audio conference manually, your audio conference dial-in number(s) are listed here. This field can include more than one ReadyTalk dial-in number (including international numbers) determined by your customized meeting requirements (see [Section 3.6 Dial-In Numbers](#)).
- **Access Code:** Lists the access code participants use to enter your conference determined by your custom subscription details (see [Section 3.5 Subscription Details](#)).
- **Web Login:** A direct link to the registration page for your ReadyTalk web conference.
- **Global Toll-Free Numbers:** For added convenience, your invitation includes a hyperlink that displays a list of any additional international toll-free dial-in numbers that are available to your participants.

Below is an example of a ReadyTalk **Audio and Web Conference Invitation**:

Invitations have not been sent for this meeting.

To...
Subject:
Location: ReadyTalk Dial-In Number: 8667401260; Access Code: 1234567 & Web Meeting Rooms...
Send

Start time: Fri 12/21/2012 11:30 PM All day event
End time: Sat 12/22/2012 12:00 AM

Call My Phone and Join Web Meeting:
<https://core.readytalk.com/dp/?an=8667401260&ac=1234567&t=w>

- OR -

- Dial-In:
 - UNITED STATES: 8667401260
 - UNITED STATES (Toll): 3032480285
- Web Login:
<https://core.readytalk.com/prt?an=8667401260&ac=1234567>
- Enter Access Code: 1234567

Click here for a list of global toll-free numbers:
<http://www.readytalk.com/?tf=8667401260>

Powered by [ReadyTalk](#)

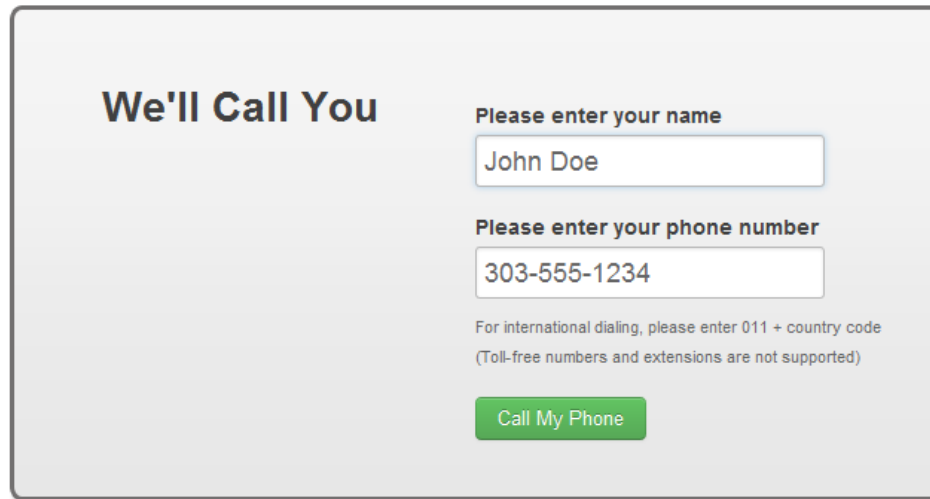
See more about: Brandon Hess.

5.2 ReadyTalk Audio Conference Invitation

The Microsoft Outlook email invitation for a ReadyTalk **Audio Conference** will include:

- **Call My Phone:** Participants wanting to join your audio quickly can simply click this direct link to ReadyTalk's audio Quick Start form that calls and joins participants to your audio conference.

Below is an example of the ReadyTalk Call My Phone form:



We'll Call You

Please enter your name
John Doe

Please enter your phone number
303-555-1234

For international dialing, please enter 011 + country code
(Toll-free numbers and extensions are not supported)

Call My Phone

- **Dial-In Numbers:** For participants wanting to join your audio conference manually, your audio conference dial-in number(s) are listed here. This field can include more than one ReadyTalk dial-in number (including international numbers) determined by your customized meeting requirements (see [Section 3.6 Dial-In Numbers](#)).
- **Access Code:** Lists the access code participants use to enter your conference determined by your custom subscription details (see [Section 3.5 Subscription Details](#)).
- **Global Toll-Free Numbers:** For added convenience, your invitation includes a hyperlink that displays a list of any additional international toll-free dial-in numbers that are available to your participants.

Below is an example of a ReadyTalk **Audio Conference Invitation**:

The screenshot shows an Outlook window titled "Untitled - Meeting". The ribbon includes "File", "Meeting", "Insert", "Format Text", and "Review". The "Meeting" ribbon is active, showing options like "Delete", "Forward", "Appointment", "Scheduling Assistant", "Cancel Invitation", "Attendees", "Options" (with a "15 minutes" dropdown), "Recurrence", "Time Zones", "Room Finder", "Categorize", "Tags", "Meet Now", "Dial-In Numbers", "Audio", and "Web".

A notification at the top states: "Invitations have not been sent for this meeting." Below this is a "Send" button and a "To..." field. The "Subject:" field is empty. The "Location:" field contains "ReadyTalk Dial-In Number: 8667401260; Access Code: 1234567" and a "Rooms..." button.

The "Start time:" is set to "Fri 12/21/2012" at "11:30 PM", with an "All day event" checkbox. The "End time:" is set to "Sat 12/22/2012" at "12:00 AM".

The main body of the invitation contains the following text:

Call My Phone:
<https://core.readytalk.com/dp/?an=8667401260&ac=1234567&t=a>

- OR -

1. Dial-In:
- UNITED STATES: 8667401260
- UNITED STATES (Toll): 3032480285

2. Enter Access Code: 1234567

Click here for a list of global toll-free numbers:
<http://www.readytalk.com/?tf=8667401260>

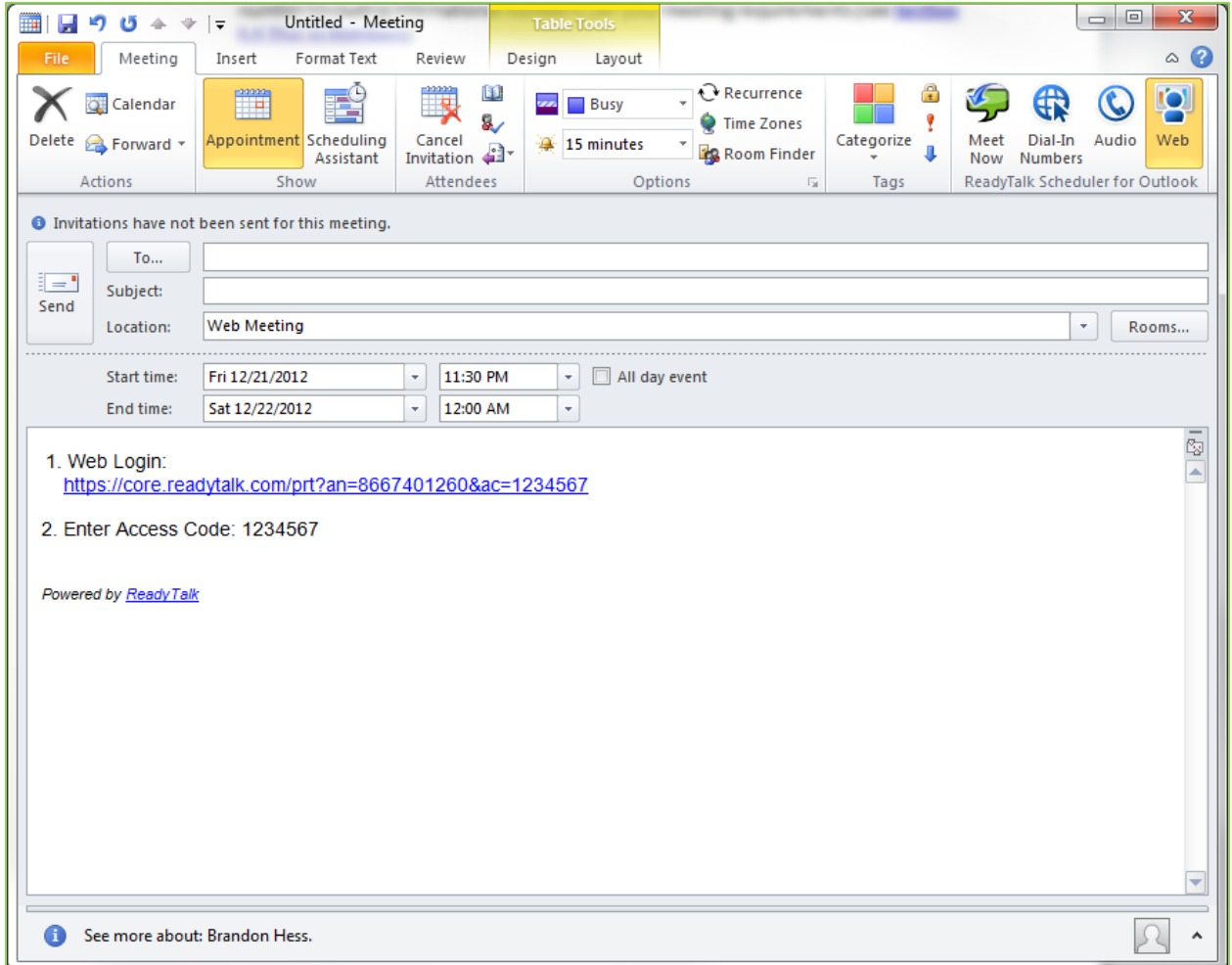
Powered by [ReadyTalk](#)

At the bottom, there is a status bar with an information icon and the text "See more about: Brandon Hess." and a profile picture icon.

5.3 ReadyTalk Web Conference Invitation

The Microsoft Outlook email invitation for a Web Conference will include a direct link to the registration page for your ReadyTalk web conference along with your meeting access code.

Below is an example of a ReadyTalk **Web Conference Invitation**:



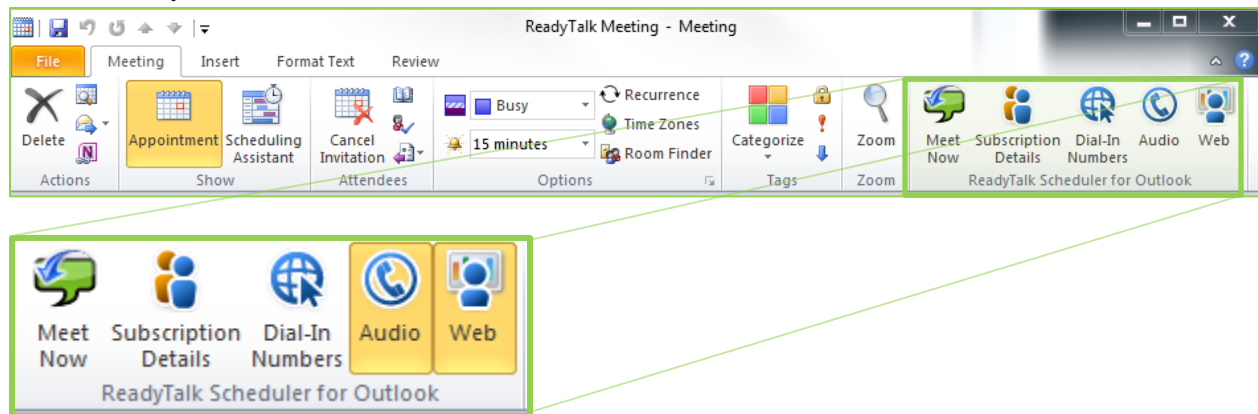
6. Customize Your ReadyTalk Scheduler for Outlook Invitation Details

From within the calendar invitation, there are additional options available from the ribbon. Changes made will immediately update the current calendar invitation. These changes will ONLY apply to the current invitation. To make changes globally for all new invitations, please refer to [Section 3.0 Customize Your ReadyTalk Scheduler for Outlook Settings](#).

Options include:

- **Meet Now:** Click to launch a ReadyTalk on-demand web meeting.
- **Subscription Details:** Click to edit what ReadyTalk subscription details are used for your invitation when managing multiple access codes.
 - **Note:** Subscription Details will only be visible when managing multiple subscriptions (see [Section 3.4 Add/Delete Subscriptions](#))
- **Dial-In Numbers:** Select to modify the dial-in numbers in the invitation. If an international number is needed, dial-in numbers must be updated with required countries.
- **Audio:** Click to turn on / turn off audio meeting details in the calendar invitation.
- **Web:** Click to turn on / turn off web meeting details in the calendar invitation.

Outlook 2007/2010



7. Uninstalling ReadyTalk Scheduler for Outlook 2007/2010

To uninstall your ReadyTalk Scheduler for Outlook 2007/2010, follow the instructions below:

1. Close Microsoft Outlook
2. Click on the Start button on your Windows taskbar.
 - a. If using Windows XP:
 - i. Select **Control Panel**
 - ii. Select **Add or Remove Programs**
 - iii. Select **ReadyTalk Scheduler for Outlook 2007/2010**
 - iv. Select **Change/Remove**
 - v. Confirm removal by selecting **Yes** at the confirmation pop-up
 - b. If using Windows Vista/7:
 - i. Select **Control Panel**
 - ii. Under Programs, select **Uninstall a program**
 - iii. Select **ReadyTalk Scheduler for Outlook 2007/2010**
 - iv. Select **Uninstall** from the top menu
 - v. Confirm removal by selecting **Yes** at the confirmation pop-up
3. The uninstallation is now complete.