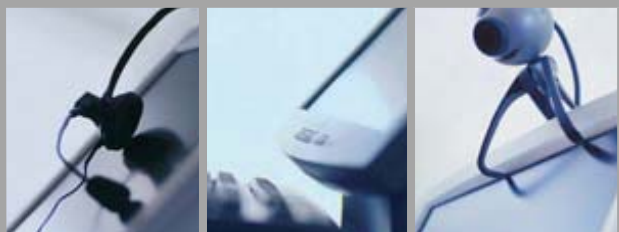


CAVALIER MEETING CENTER



User Guide v4.1



Cavalier[®]

WELCOME TO CAVALIER MEETING CENTER

Cavalier Meeting Center is your perfect everyday business conferencing tool. Our award-winning technology integrates fully-automated voice conferencing with easy-to-use web conferencing and desktop video, turning your PC into a universal communications tool. Reliable and secure, you can present PowerPoint™ slides, share applications, quiz and survey participants, lead a web tour, even connect via VoIP – all with the same impact and results as in-person meetings. So you meet more productively and more often without the time and expense of travel.



Use Cavalier Meeting Center for:

- Sales Presentations
- Training and e-Learning Programs
- Marketing Seminars
- Product Launches
- Departmental Meetings
- Company Announcements
- Collaboration and Project Management

Tips for a Successful Conference

Below are some helpful hints for conducting an efficient and productive Cavalier Meeting Center conference.

- Prepare in advance. To avoid meeting delays, take time before the conference to create and upload any resources you'll need for your meeting, such as presentations, surveys or quizzes.
- Enter the meeting early to ensure participants can access your meeting at the scheduled start time. Give yourself a few minutes to open the meeting room and make sure all necessary system components are loaded.
- When speaking, talk directly into either a headset or telephone receiver for optimal clarity.
- Mute all participants in non-collaborative meetings to minimize background noise.
- Be conscious of participant connection speeds, as they may vary. Allow time for transition between slides.
- For optimal application sharing performance, keep the number of open windows to a minimum.
- Use annotation tools and include polling and quizzes to promote interactivity.
- To help participants better understand and recall content, limit presentation materials to 6-7 lines per slide. Use larger-sized fonts for legibility.
- Prior to the meeting, all participants should perform the browser test included in the meeting invitation to ensure their browsers and operating systems are compatible and that there are no firewall issues.
- Be sure participants download the Conferencing Application prior to your meeting if they wish to use certain features such as Presenter capabilities, Desktop VoIP and/or Video access.

Note: *Your participants are not required to download the application to join your meeting.*

WEB CONFERENCING

Use this as a guide for your voice and web meetings

Getting Started:

To schedule and start web meetings, install Cavalier Meeting Center:



- 1- Go to <http://cavalier.conferencing.com>
- 2- Click the Install button and follow the easy install wizard.

Once downloaded, you'll have everything you need to schedule and run effective online meetings.

Schedule a Meeting

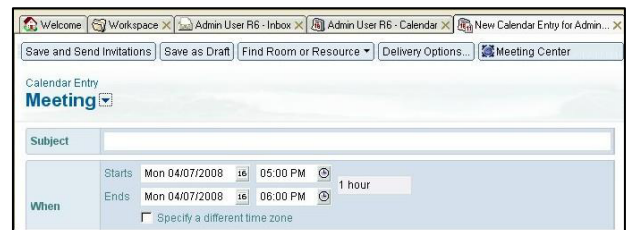
Through Microsoft Outlook:

- 1- From your Outlook Calendar, double-click the appointment time.
- 2- Enter the meeting topic in the Subject line, and click the Meeting Center button.
- 3- Click the Scheduling tab/icon, invite participants as you normally do, and send.



Through Lotus Notes:

- 1- From your Lotus Notes Calendar, open the appointment time.
- 2- Enter the meeting topic in the Subject line and click the Meeting Center button.
- 3- Invite participants as you normally do, and Click the Save and Send Invitations button.



Note: If you do not install the Outlook or Lotus Notes Calendar tools, click the desktop icon in your taskbar and select *Schedule a Meeting*. Follow the steps through the scheduling wizard.

Start a Scheduled Meeting:

Moderator:

- 1- Open the scheduled meeting in your Outlook or Lotus Notes Calendar.
- 2- Click the "JOIN Meeting" link.
- 3- Select how you would like to join the voice portion of your meeting in the first Quick Start menu and click Next.
- 4- Select what you would like to do first when your meeting begins (i.e. Show Presentation, Share Application, etc) in the second Quick Start menu and click Finish.

Note: If you have not installed the Outlook or Lotus Notes Calendar tools, click the desktop icon in your taskbar and select *Start Meeting*. Click on the specific scheduled meeting link.

CONFERENCE MANAGEMENT

Use this as a guide for your voice and web meetings

Start an Ad Hoc Meeting

- 1- Click the desktop icon in your taskbar and select Start a Meeting.
- 2- Click the Ad Hoc Meeting button.
- 3- Select how you would like to join the voice portion of your meeting in the first Quick Start menu and click Next.
- 4- Select what you would like to do first when your meeting starts (i.e. Show Presentation, Share Application, etc) in the second Quick Start menu and click Finish.

Note: If you do not have scheduled meetings starting within three hours, Step 2 above is eliminated.



Participant Access:

- 1- If the meeting was scheduled in advance, participants click on the link provided in the email invitation to join.
- 2- For instant (Ad Hoc) meetings, participants go to <http://cavalier.conferencing.com> and click Participant. Participants will be prompted to type in your Meeting Number and their names.

Note: Moderators can also send a Quick Invite via Instant Messenger or email using the Quick Invite in-meeting shortcut toolbar. Participants simply click on the link to join the meeting.

- 3- Participants will be asked how they wish to access the voice portion of your meeting, and will be prompted to identify themselves if they choose the options Already Dialed In or Dial In Now.

Note: The web conference room door remains closed and participants are sent to the waiting room until the moderator starts the voice portion of the call or opens the web door.



Cavalier Meeting Center Desktop Icon

The Cavalier Meeting Center desktop icon is automatically populated to your taskbar when you install the Cavalier Meeting Conferencing Application. This user-friendly tool can be used for:

- 1- Click access to scheduled or Ad Hoc meetings.
- Scheduling meetings.
- Joining meetings.
- Accessing your Conference Manager (online Cavalier Meeting Center account).

CONFERENCE MANAGEMENT

Use this as a guide for your voice and web meetings

Dial Out to Participants

- 1- Click on the Dial Out button in the shortcut toolbar.
- 2- Enter the name and number of the person to call or click the Address Book button and select the previously stored contact from your Address Book.
- 3- Click Dial.

Additional Security/Close Door to the Meeting

The moderator can screen participants via the waiting room then provide them access to the meeting one at a time.

- From the Participant panel, check/uncheck the Close Meeting Room Door to close and open the meeting to attendees.

Note: By default the door to the meeting is closed.

Connection Status

The moderator can see how participants are connected to the meeting by viewing the Status column in the Participants panel.

Status types include:

- Phone
- Web
- Phone/Web
- Desktop VoIP/Web
- Streaming/Web

Note: Sort participants by Name, Emoticon or Status in the Participants panel by clicking on the specific column header.

Voice Status Icons

The moderator can always see the voice status of the participants in the Participant panel.

Status icons:



Standard Voice Icon.

The participant (or moderator) is currently in the main voice meeting room.



Active Speaker icon.

The participant (or moderator) is currently speaking, or it may indicate background noise coming from this line.



Muted line icon.

The participant cannot be heard when his/her line is muted.

Desktop VoIP


Cavalier Meeting Center Desktop VoIP is a secure, low-bandwidth and firewall-friendly solution that uses Voice over Internet Protocol to connect moderators and participants to the voice portion of an online meeting. All you need is an Internet connection and headset with microphone connected to your computer!

- To connect via Desktop VoIP upon **starting or joining** a meeting, simply click the Connect via Desktop VoIP button in the first Quick Start menu.
- To connect via Desktop VoIP **during** a meeting, click the Voice Connection panel and select Connect Desktop VoIP to Meeting.
- Easily toggle between Desktop VoIP and PSTN (telephone) during a meeting via the Voice Connection panel.

CONFERENCE MANAGEMENT




Use this as a guide for your voice and web meetings

Mute/Un-mute Participants

- 1- Click on the Voice icon  next to the participant's name to mute or un-mute that participant.
- 2- You can also mute or un-mute all participants at once by clicking the Mute/Un-mute All button in the shortcut menu.

Q&A

The moderator can initiate a Q&A session where participants request the right to speak by using their touchtone telephones.

- 1- Click on the Meeting menu at the top of the interface.
- 2- Select Voice and then Voice Q&A.
 Your participants will be informed that their lines have been muted.
- 3- Instruct your participants to hit the  key to indicate that they would like ask a question.
- 4- Click on the raised hand  in order to give the floor to the participant.

Note: The first participant in line will have a highlighted hand icon.

Contact Technical Support

- Click on the Help menu and select Dial Customer Support.

COLLABORATION & OTHER FEATURES

Show a Presentation

The moderator can easily show a PowerPoint™ presentation to participants.

Before the meeting

- 1- In your Conference Manager, under Resources, select Presentations.
- 2- Click Upload a Presentation.
- 3- Name the presentation, browse to select the presentation you want to upload and click the Upload Presentation button.

Note: You can also uUpload a presentation from within a Cavalier Meeting Center web meeting. In the Show panel, select Presentation, click Browse to select your presentation and click Upload.

In your meeting

In the Show panel, select Presentation and choose your presentation from the pull-down menu. It will load automatically.

- 1- Click on the slide preview “thumbnails” or the forward and back buttons to navigate through your presentation.
- 2- Click on the slide being displayed to proceed to the next slide.

Share an Application

- 1- In the Show panel, select File or Application and choose the application(s) you would like to show to participants. Check the application(s) to begin sharing.
- 2- Alternatively, click Entire Desktop to share all applications open on your computer.

Note: You can click on the shared application to hide the moderator control panel. Simply click the Meeting Center tab on the right-hand side of your screen for the control panel to reappear on top of the application.

CONFERENCE MANAGEMENT

Use this as a guide for your voice and web meetings

Surveys-Quizzes-Polls

- 1- In your Conference Manager, find Surveys, Quizzes and Polls under Resources.
- 2- Click Create New Survey [Quiz/Poll] and make your selections.
- 3- During a meeting, click on the Meeting menu on the top of the interface. Select Meeting Options, check Display Survey-Quiz-Poll and click OK. The Survey-Quiz-Poll panel will appear in the meeting interface which allows you to display or upload your surveys/quizzes/polls.
- 4- After the meeting, review the results from the Survey [Quiz] Summary under Reports.



Upload a Picture or Other Image to Broadcast in a Meeting

- 1- In the Conference Manager, go to Resources, then Images.
- 2- Click Upload Image & follow the upload wizard.
- 3- During the meeting, to display the image, click on the Meeting menu on the top of the interface. Select Meeting Options, check Display Image, select image from the pull-down and click OK. The image will be displayed in the top right corner of the meeting interface.

Broadcast Live Video of Yourself and/or Other Meeting Participants.

During the meeting, click on the Meeting menu at the top of the interface and select Enable Desktop Video.

Archiving

Click on the Meeting menu and click Record Archive.

- 1- Name the archive, select Voice and/or Web and click Record (allow up to 30 seconds for the recording to start). The Archive panel will then appear in the meeting interface.
- 2- To stop the recording, click Stop in the Archive panel.
- 3- After the meeting you can find the Archive in the Conference Manager, under Conferencing/Archives.

Note: Additional charges will apply.

Reports

Cavalier Meeting Center stores detailed reports from scheduled and Ad Hoc Meetings, with information on duration of the meeting, number of participants, participant name and/or telephone number, participant connection type (voice, web, streaming), who accepted or declined the invitation, as well as survey or quiz results.

- Click on the Reports tab in Conference Manager to access meeting reports.



VOICE CONFERENCING

Not Online? Use this as a guide for your voice-only meetings

Start/Access a Meeting

Moderator:

- 1- From your telephone, dial your Access Number, then your Meeting Number, ensuring that the Meeting Number is preceded and followed by the * key.
- 2- Enter your 4-digit PIN, ensuring the number is preceded and followed by the * key.

Note: Moderators with the Account Code option will be prompted to enter the Account Code after opening the conference (prefixed and followed by the * key). Please contact Customer Support with any questions regarding the Account Code option.

Participants:

Participants dial your Access Number and Meeting Number to enter the conference, ensuring that the Meeting Number is preceded and followed by the * key.

Dial Out to Participants

Dial the participant's telephone number preceded and followed by the * key.

North America:

* 1 + area code + telephone number *

International:

* 011 + country code + area code + telephone number *

- To disconnect the last number dialed: *2*
- Redial last number: *3*

Additional Security/ Close Door to the Meeting

The moderator can close the door to the meeting at any time to prevent access to the meeting room.

- Open conference but keep "door" closed: *PIN+7*
 - Open/close meeting room "door": *7*
 - Let participants in, one by one from the "waiting room": *1*
- Three audible beeps will alert the moderator that a participant is in the "waiting room".

Roll Call/Participant Name Capture:

Upon activation, participants will be prompted to record their names to be played upon conference entry and exit.

- Activate/deactivate roll call and name capture on a per call basis: *74*

When roll call is activated, the following features become available:

- Previous Entrant Name Record: *78* (prompts all participants who entered room prior to *74* activation to record names)
- Conference Entry and Exit announcement options: *73*

Note: Cycle through announcement options by continuing to select *73* on your keypad.

- Roll Call- play names of each participant and number in conference: *007*

Conference Security Code:

Provides additional security for meetings.

- Moderators select a 4 digit security code: Enter *4xxxx* to set the code, where xxxx is the 4 digit conference security code.
- Moderators use *70* to enable or disable the feature on a per call basis. When the Conference Security code is activated by the moderator, participants will be prompted to enter the 4 digit code to access the voice portion of the conference, prefixed and followed by the * key.
- Participants are prompted to enter: *xxxx*

Other Useful Features

- Mute/Un-mute All Participants: *51*
- Participant Self-mute/un-mute: *6*
- Deactivate/Activate Entry and Exit Tones: *73*
- Activate/Deactivate Listen Only (Mute) with Q&A: *50*
- Close the Meeting- end conference and disconnect all participants: *9*

Contact Technical Support

- Technical Support during conference: *10*
- Technical Support outside the conference:
North America: 1-877-769-7235
International: 1-303-267-1084



CAVALIER MEETING CENTER

Customer Service and Support

We are here to help you at any time:

- Technical Support: 1-877-769-7235
1-303-267-1084
- Technical Support During Conference *10*
- Customer Service: 1-877-769-7235
1-303-267-1084

