Webex Meetings

Meeting Templates

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Create & Use a Meeting Template In Cisco Webex Meetings

CREATE MEETING TEMPLATE

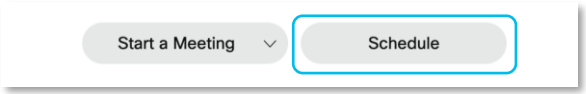
Create a Meeting Template in Cisco Webex Meetings

On the Webex site in Modern View, you can make and save a scheduler template to use later with options tailored to your meeting needs.

Once a template is saved, it can be accessed through your Outlook calendar or through your Webex site.

A Log into your Webex account.

B In the modern view of the site, click the Schedule button to access the **Schedule a Meeting** page.



C Select Webex Meetings Pro 1000 from the **Meeting Type** drop-down list.

D Enter a name for the meeting in **Meeting Topic.**

E Add or change the **Password.**

F Select the **Date and Time** for your meeting.

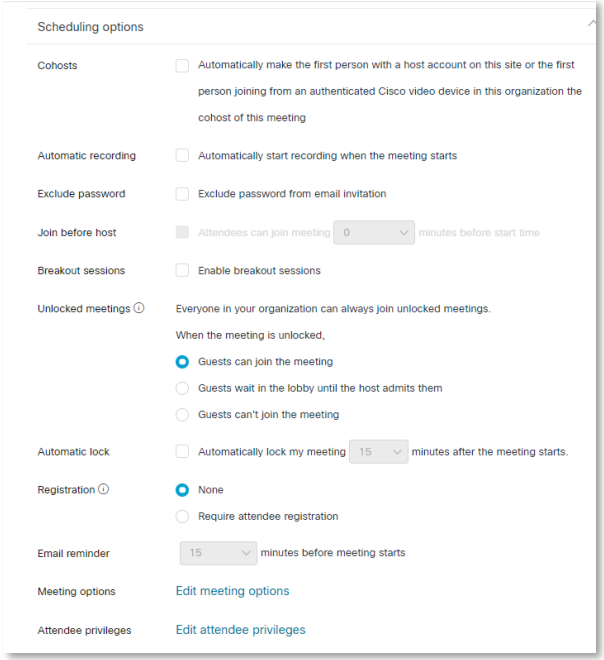
G (Optional) You can set the meeting to repeat by checking the **Recurrence** check box. You can schedule your meeting to happen daily, biweekly, monthly, and more.

NOTE: Recurrence settings are not included when you save a meeting template.

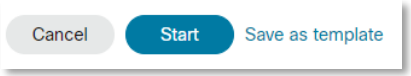
H If sending the invite from Webex directly, in the **Attendees** field enter the email addresses of the individuals you'd like to invite to your meeting.

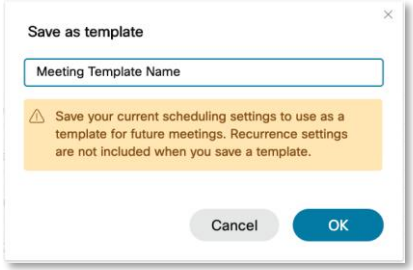
I For more options, select **Show Advanced Options**.

Advanced options include things like entry/exit tones, cohosts, auto recording, breakout sessions enabled, unlocked/locked meeting settings, registration, meeting options such as chat turned on/off, attendee privileges such as content sharing, viewing participant list, chat options, etc.



J To save your settings as a meetings template click **Save as Template.** In the window that appears, enter a template name and then click **OK** to be returned to the main scheduling page.





K To start your meeting right away, click **Start**; if you're meeting later, click **Schedule.**

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USING A MEETING TEMPLATE

From Cisco Webex Meetings Modern View

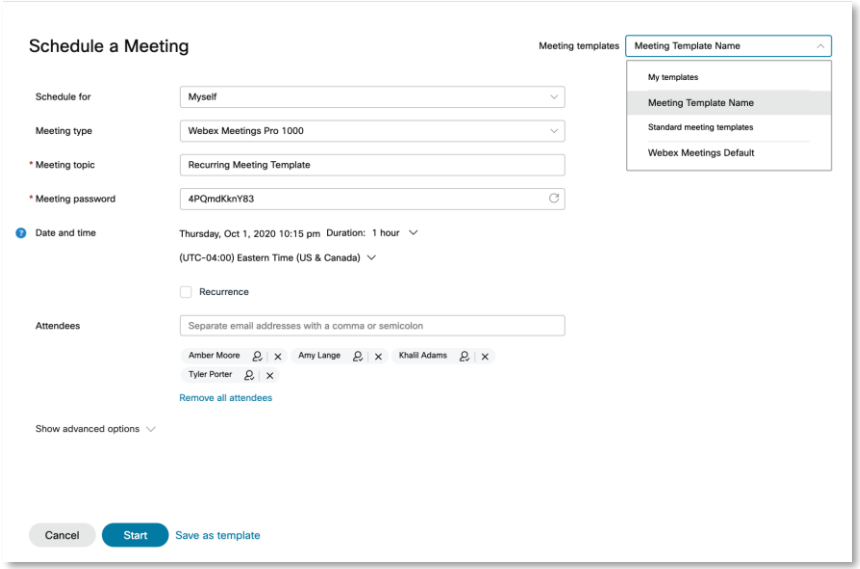
A Log into your Webex account.

B Click the Schedule button to access the **Schedule a Meeting** page.

C Next to **Meeting templates** select your template from the drop-down.

D Make any changes you need to the **Meeting topic**, the **Date and time**, the **Attendees** or under **Show advanced options**.

E Select **Start** to start your meeting right away or **Schedule** to schedule your meeting for later.



USING MICROSOFT OUTLOOK

From Microsoft Outlook Calendar

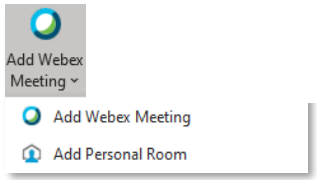
A From your Outlook Calendar, create a new Appointment.

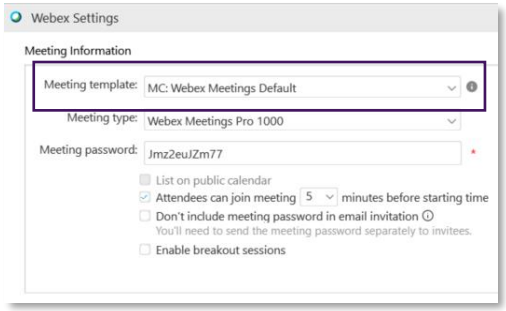
B In the Appointment window, click on Webex icon labeled ‘ add Webex Meeting' to your invite.

C Click the gear icon labeled 'Change Settings’ to access your saved Meetings template.

D Select your Meetings template from the drop-down menu ‘Meeting template’.

E Review the meeting topic, date and time, and attendees for accuracy before clicking **Send** to schedule your meeting using the saved template settings.





COMING SOON!

Quick Sync Meeting Templates! – CLICK HERE FOR MORE INFO!
Book a 7-minute meeting, with a timer, that automatically ends when time runs out. This is a time-forcing function that takes out the unnecessary chatter and lets you get down to brass tacks!

Roundtable Meeting Templates! – CLICK HERE FOR MORE INFO!
The Webex “Roundtable” meeting template is designed to give everyone a voice. This meeting template gives all meeting participants a designated amount of time to speak with a timer to count down remaining time and a participant that list shows who has gone and whose is next.

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