



Webex Meetings

Meeting Templates



Create & Use a Meeting Template In Cisco Webex Meetings

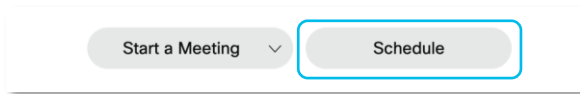
CREATE MEETING TEMPLATE

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.

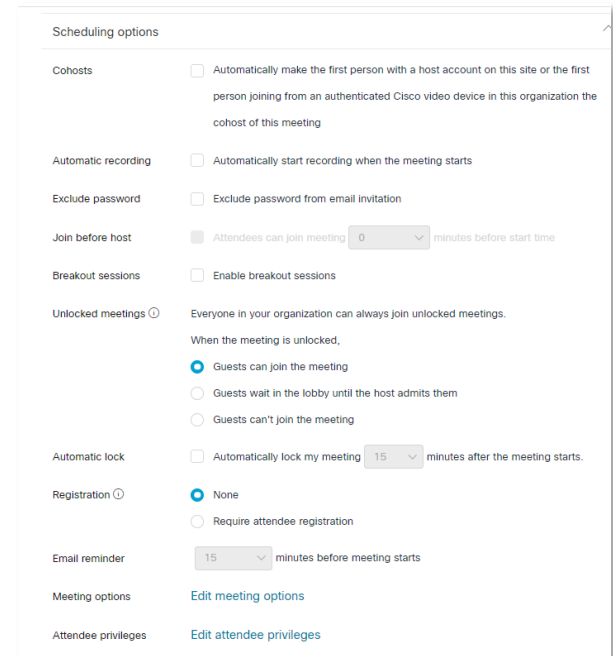
- G (Optional) You can set the meeting to repeat by checking the **Recurrence** check box. You can schedule your meeting to happen daily, biweekly, monthly, and more.

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

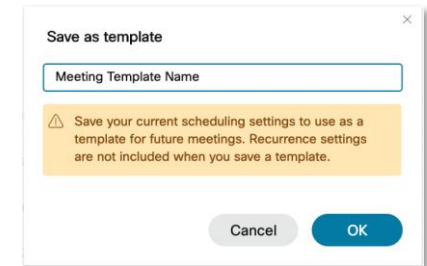
- H If sending the invite from Webex directly, in the **Attendees** field enter the email addresses of the individuals you'd like to invite to your meeting.

- 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**.

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.

Screenshot of the "Schedule a Meeting" page in Cisco Webex Meetings Modern View. The page shows fields for "Schedule for" (Myself), "Meeting type" (Webex Meetings Pro 1000), "Meeting topic" (Recurring Meeting Template), and "Meeting password" (4PQmdKknY83). It also shows "Date and time" (Thursday, Oct 1, 2020 10:15 pm) and "Attendees" (Amber Moore, Amy Lange, Khalil Adams, Tyler Porter). A "Meeting templates" dropdown menu is open, showing "Meeting Template Name", "Standard meeting templates", and "Webex Meetings Default". Buttons for "Cancel", "Start", and "Save as template" are at the bottom.

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.

Screenshot of the "Add Webex Meeting" dialog box in Microsoft Outlook. The dialog shows "Add Webex Meeting" and "Add Personal Room" options. A "Webex Settings" window is open, showing "Meeting Information" with "Meeting template" (MC: Webex Meetings Default), "Meeting type" (Webex Meetings Pro 1000), and "Meeting password" (Jmz2euJZm77). Other options include "List on public calendar", "Attendees can join meeting" (5 minutes before starting time), "Don't include meeting password in email invitation", and "Enable breakout sessions".

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.