

Job Aid: Webex Meetings Template

What is the Cisco Meeting App?

The City of Chandler uses the Cisco Webex Meetings app for remote and internal conference calls. This document outlines how to create a meeting template that has repeatable meeting settings, so creating future meetings becomes easier and faster.

Creating a Meeting Template

1. Open a browser and go to <https://chandleraz.webex.com/>.
2. Log in with your COC email and password.

Note: You may be prompted to log in twice.

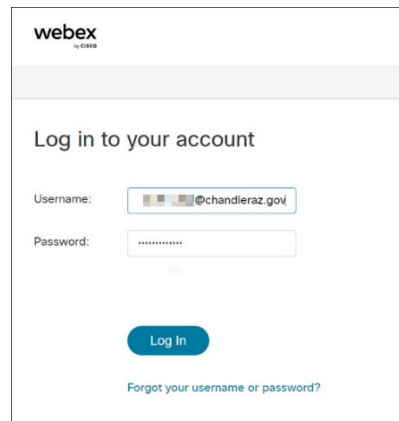
The image shows the Webex login page. At the top left is the 'webex by cisco' logo. Below it is a search bar. The main heading is 'Log in to your account'. There are two input fields: 'Username:' with a dropdown menu showing '@chandleraz.gov' and 'Password:' with a masked field. Below the fields is a blue 'Log In' button and a link for 'Forgot your username or password?'.

Figure 1

3. Click **Meetings** on the left-hand menu (Figure 2).

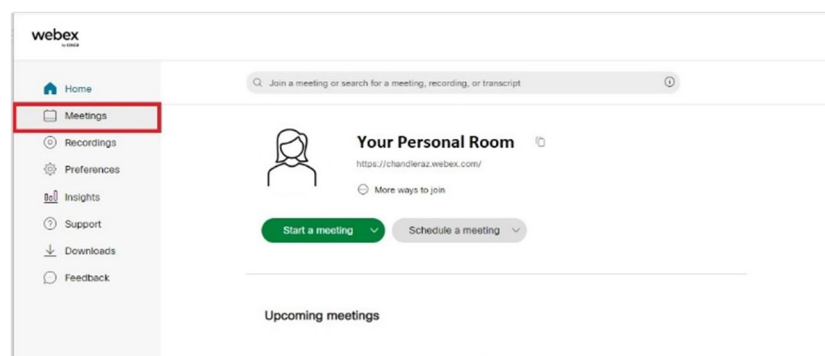


Figure 2

4. Click **Schedule a Meeting** as shown in Figure 3.

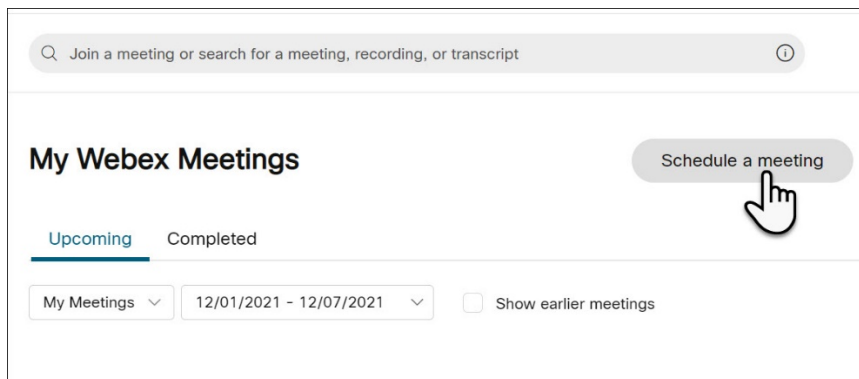


Figure 3

5. The **Schedule a meeting** screen opens. Click **Show Advanced Options** located in the middle left of the screen. (Figure 4).

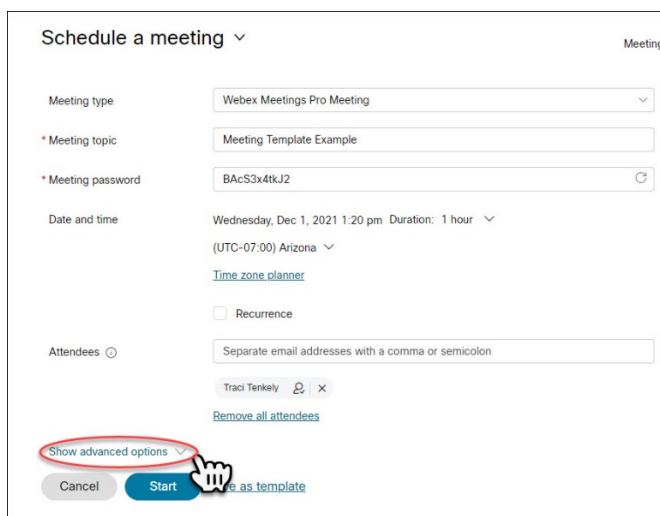


Figure 4

6. To set **Audio connections options**, click the **arrow**. Then, select the options.

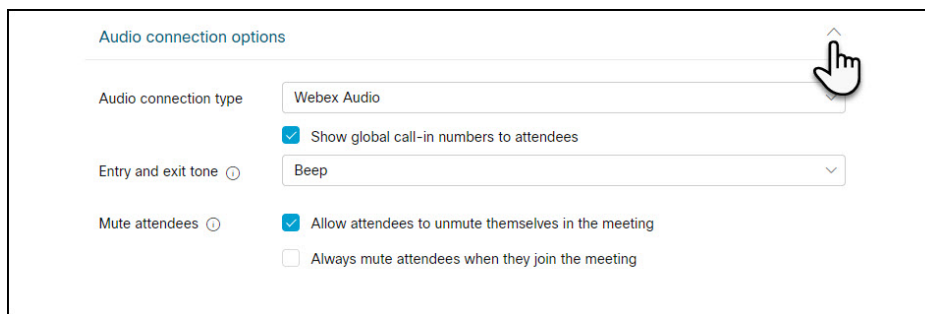
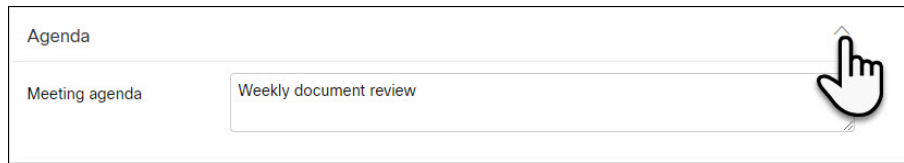


Figure 5

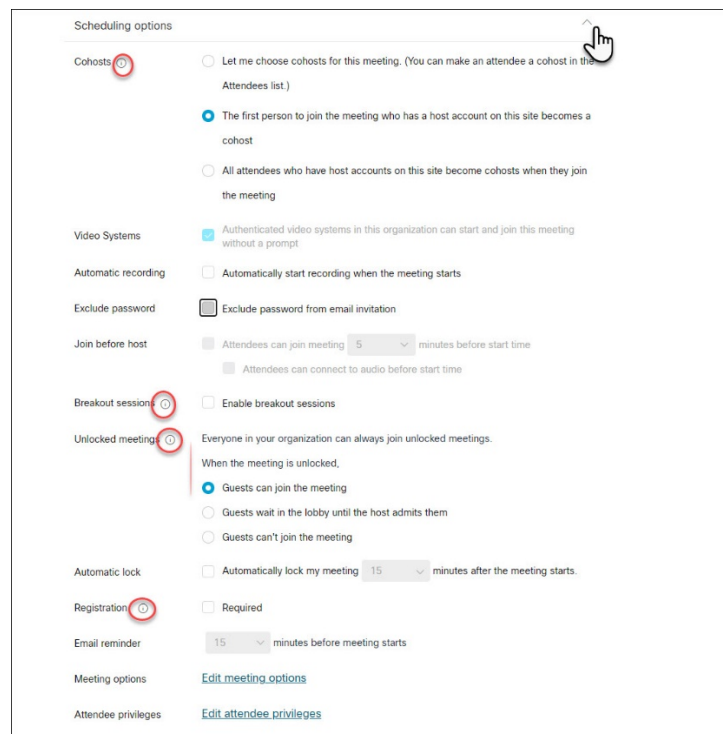
7. To set an **agenda**, click the **arrow**. Enter text in the **Meeting agenda** field.



The screenshot shows a form with a label "Agenda" and a text input field labeled "Meeting agenda". The input field contains the text "Weekly document review". A hand cursor icon is positioned over the right side of the input field, indicating it is clickable.

Figure 6

8. To select the **Scheduling options**, click the **arrow**. For more information about options, click the tool tips next to the option (shown in red in Figure 7).

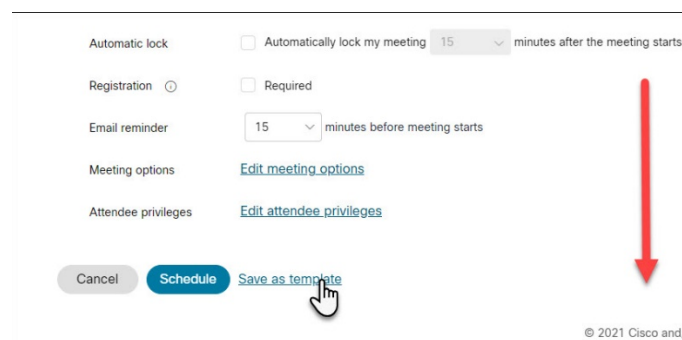


The screenshot displays the "Scheduling options" panel. It contains several sections with various settings and tool tips (circled in red):

- Cohosts**: Three radio button options. The second option, "The first person to join the meeting who has a host account on this site becomes a cohost", is selected.
- Video Systems**: A checked checkbox for "Authenticated video systems in this organization can start and join this meeting without a prompt".
- Automatic recording**: An unchecked checkbox for "Automatically start recording when the meeting starts".
- Exclude password**: A checked checkbox for "Exclude password from email invitation".
- Join before host**: Two unchecked checkboxes for "Attendees can join meeting 5 minutes before start time" and "Attendees can connect to audio before start time".
- Breakout session**: An unchecked checkbox for "Enable breakout sessions".
- Unlocked meeting**: A checked radio button for "Guests can join the meeting".
- Automatic lock**: An unchecked checkbox for "Automatically lock my meeting 15 minutes after the meeting starts".
- Registration**: An unchecked checkbox for "Required".
- Email reminder**: A dropdown menu set to "15 minutes before meeting starts".
- Meeting options**: A link for "Edit meeting options".
- Attendee privileges**: A link for "Edit attendee privileges".

Figure 7

9. Scroll to the bottom of the page and click **Save as template** (see Figure 8).



The screenshot shows the bottom of the page with the following elements:

- Automatic lock**: Unchecked checkbox for "Automatically lock my meeting 15 minutes after the meeting starts".
- Registration**: Unchecked checkbox for "Required".
- Email reminder**: Dropdown menu set to "15 minutes before meeting starts".
- Meeting options**: Link for "Edit meeting options".
- Attendee privileges**: Link for "Edit attendee privileges".
- Buttons**: "Cancel", "Schedule", and "Save as template" buttons. A hand cursor is over the "Save as template" button.
- Red Arrow**: A large red arrow pointing downwards, indicating the scroll direction.
- Copyright**: "© 2021 Cisco and/or its affiliates. All rights reserved." at the bottom right.

Figure 8

10. The **Save as meeting template** window opens. Enter a unique name for the template. Then, click **Save**.

Note: The template is accessible to all COC employees who have access to Webex.

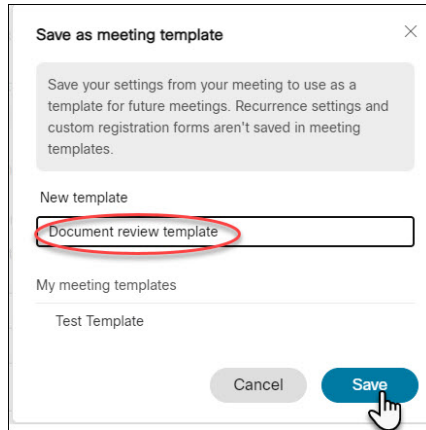


Figure 9

11. To use the template, schedule a meeting by logging into your personal room meetings as explained in steps 1-4. Then, use the **Meeting templates** drop-down to select your template.

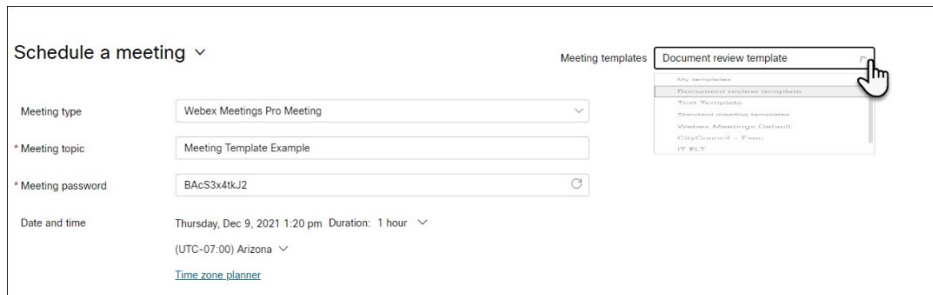


Figure 10

12. Select your date and time and the attendees. Click **Schedule** to send the invites.

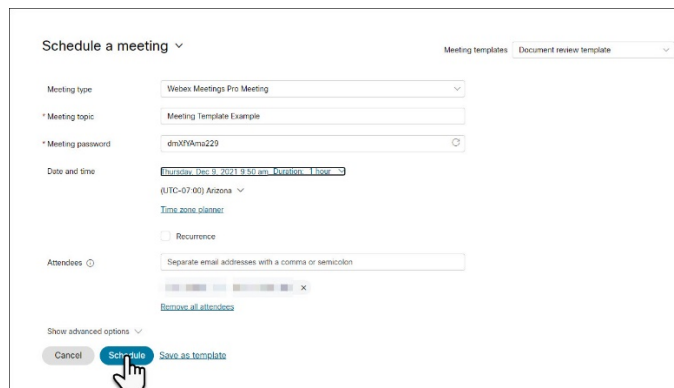


Figure 11