



Creating and Modifying Meeting Templates and Layouts in Cisco Unified MeetingPlace

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Meeting Templates

Meeting templates allow you to specify meeting room formats, add attachments, create polls, and set other meeting parameters that can be applied each time you create a meeting by using the template. The meeting template you select when creating a meeting also dictates the default permissions that meeting invitees are assigned as you add them to the meeting (although you can change these permissions while adding invitees).

Cisco Unified MeetingPlace has four predefined templates to suit different meeting styles, depending on what you choose as your web conference provider. Users with appropriate permissions can select from among these templates or create custom templates.

Web Conference Provider	Predefined Template Options
Cisco Unified MeetingPlace	<ul style="list-style-type: none"> • Collaborative—An open forum-style meeting where all participants can share, speak, and participate in the meeting since they enter with Presenter meeting room permissions by default. • Presentation— A meeting where one or more participants present to an active audience of one or more participants. All participants enter the meeting with speaking privileges. • Webinar—A lecture-style meeting where one participant is the moderator, there are one or more presenters, and the remainder of the participants are passive audience members. All passive audience members enter without speaking privileges.
Cisco WebEx	<ul style="list-style-type: none"> • Meeting Center—A meeting where participants can host presentations and collaborate online.

**Note**

You cannot use a custom template if you are scheduling a meeting that will include external web participants, that is, “Allow External Participants” set to Yes. If you later update or reschedule the meeting and set “Allow External Participants” to Yes, the meeting template will be reset to the Collaborative template. Once a meeting scheduled with a custom template begins, you will not be able to escalate the meeting to an external meeting.

Cisco Unified MeetingPlace Template Contents

When you convert a meeting room to a template, you make a duplicate of that meeting room. Layouts, tools, and most contents and room information are preserved in the template, including:

- Layouts with name, order, and starting (selected) status.
- Tools with name, size, position, and settings for full-screen toggle.
- Tool content.
- Whiteboard overlay contents.
- Poll state (Prepare, Open, Close), questions, answers, and broadcast results.
- Questions and answers, Chat tool link, and status (Open, Answered, All).
- Text in Notes tool.
- Messages to be displayed to users when a meeting is on hold or ended.
- Room background, screen resolution, and bandwidth.
- Presenter Only area status.

Certain information is not saved to the template. Voice meeting settings and the content of a tool are not saved to a template.

How to Create a Cisco Unified MeetingPlace Template

Depending on your account settings, if you use Cisco Unified MeetingPlace as your web conference provider, you might have the privileges to create and modify custom templates that are based on the predefined templates.

If you see a My Templates link after you sign in to Cisco Unified MeetingPlace, you can use the predefined templates or create templates to use when scheduling meetings. If you do not see the My Templates link, your user profile privileges are limited so that the meeting console for meetings that you create contains only a participant list and associated audio and video controls for the meeting; when scheduling a meeting, you can choose either the Collaborative template or the Webinar template, but the template you choose affects only the audio permissions of attendees.

After you create a template, the template name displays in the Meeting template list in the Meeting Schedule window.

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Creating a Template

Before You Begin

This procedure supports meetings scheduled with Cisco Unified MeetingPlace as the web conference provider.

Procedure

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- Step 1** Sign in to Cisco Unified MeetingPlace.
 - Step 2** Click **My Templates**.
 - Step 3** Enter a name for the template in the Template Name field.
 - Step 4** For Template Based On, click one of the predefined meeting templates (Collaborative, Presentation, or Webinar).
The initial meeting room layout will be based on this template, although you can change the layout later.
 - Step 5** Click **Create Template**.
The meeting console opens to the [moderator](#) view of the selected predefined template. You can edit the layout, attach files to share, and set other parameters.
 - Step 6** (Optional) Click **View > Presenter View** or **Audience View** to view or change the meeting room layout for other types of participants.
 - Step 7** Close the meeting console.
Your changes are saved automatically.
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Editing a Template

If your user profile has full meeting console permissions, you can use the My Templates link to rename a template or edit template settings.

Before You Begin

This procedure supports meetings scheduled with Cisco Unified MeetingPlace as the web conference provider.

Procedure

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- Step 1** Sign in to Cisco Unified MeetingPlace.
- Step 2** Click **My Templates**.
- Step 3** To rename the template, click on the template name, type in the new name, and click **OK**.
- Step 4** To modify the meeting room layout or other settings, perform the following sub-steps:
- a. Click the pencil icon in the Edit column of the My Templates table.
 - b. Make any desired changes to the Moderator view.



Tip To change the meeting room layout for other types of participants, click **View > Presenter View** or **Audience View**.

- Step 5** When you have completed your changes, close the meeting console window.
Your changes are saved automatically.
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Saving a Past Meeting as a Template

If your user profile has full meeting console permissions, you can save a meeting that you already scheduled as a template after the meeting ends.

Before You Begin

- This procedure supports meetings scheduled with Cisco Unified MeetingPlace as the web conference provider.
- You must be the meeting scheduler to access this feature.

Procedure

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- Step 1** Sign in to Cisco Unified MeetingPlace.
- Step 2** Enter the meeting ID of the meeting that you want to access.
- Step 3** Click **Find Meeting**.
The Past Meeting page displays.
- Step 4** Enter a name for the new template in the Save As Template section.
- Step 5** Click **Save Meeting As Template**.
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