Advanced Zoom functions: Using polls

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1: Introduction

Zoom offers the opportunity to add polls to your meeting. This is a great way to interact with your members. Some of the things you can use polling for include:

- checking understanding
- gauging opinion
- obtaining feedback
- voting (e.g. voting on options for events or talks).

You might find other innovative ways to use the polling function.

Zoom allows you to add one or more polls to any meeting. The process is the same, no matter how many polls you choose to add.

Although you can add your polls from the meeting itself, we recommend that you don’t do this. Unless you are practised at it, doing this can cause confusion in the meeting.

The recommendation is that you add your poll(s) prior to the meeting. You should do this from the meeting page on the website. If you do this, all you will need to do in the meeting is to launch the poll(s) you have prepared.

Adding your poll(s) prior to the meeting means that you can give proper focus to getting the wording and options correct. For example, if you are using the poll to vote, you need to know the precise wording of any proposal, or the full list of candidates for an election.

In this tutorial, we will only be focusing on how to add polls prior to your meeting, from the Zoom website.

There are few things that you need to be aware of:

- To set up a poll, the host will need to have a Zoom license. This means that you will need to be signed up to a paid account, typically a Pro Account. Polls are not available on the Basic (free) Account.
- To launch a poll, you need to be hosting your meeting from the desktop app. Polls cannot be launched from mobile devices (tablets or mobile phones).
- Only the meeting host can add or edit polls. If you have a co-host, they will be able to launch any polls that have already been created. However, a co-host will not be able to add or edit polls.
- Polls offer single choice or multiple-choice question formats. We will explain this later in this tutorial.
2: Check your settings

The first thing you need to do is to check your default settings, to ensure that you have **Polling** enabled.

Sign into your account on the Zoom website: [https://zoom.us/signin](https://zoom.us/signin), from your web browser (e.g. Google or Explorer).

You will most likely be taken straight to your **Meetings** page.

To check your default settings, you need to go to your **Settings** page. You will see this listed on the left-hand side of the web page.

Click on the **Settings** option to go to your settings page. The page is fairly long. You need to locate the **Polling** section. You can either scroll down to find it, or you can use the **Find** shortcut. Using the shortcut is the quickest way to get to where you need to be on the page.
The **Find** shortcut

Hold down the Control key [CTRL] on your keyboard.

While keeping the CTRL key held down, press your F key. This will bring up a search box. This is likely to appear near the top of your screen.

**If you are on an Apple computer, you will need to use COMMAND and F in the same way.**

Type ‘**polling**’ into the search box, and press return.

You will be taken straight to the **Polling** section on the settings page.

The **Polling** section on the settings page looks like this:

```
Polling
Add 'Polls' to the meeting controls. This allows the host to survey the attendees.
```

Ensure that the button slider on the right is blue. This means that polling is turned on. If this slider is grey, just click on the button to turn it on.

Your changes will be updated and saved automatically.
3: Adding a poll

The most efficient way to add your poll is by going to the relevant meeting page on the Zoom website. This should be done prior to your meeting.

Let’s go through this step-by-step.

If you haven’t scheduled your meeting yet, do this first. When you save the meeting, you will be given an option to add a poll.

If you have already scheduled your meeting, you just need to go to your meeting page to find the option to add a poll.

Go to the meetings section on the website (Meetings should be highlighted on the menu on the left-hand side of the web page).

Find your meeting in your list of upcoming meetings. Click on the title of the meeting to access the meeting page.

Your meeting page will look something like this:

Now you just need to scroll down to the bottom of the page. You will see an option for adding a poll. In the image below, you will see the poll section highlighted by the box.
To add a poll, you just need to click on the **Add** button, which is located on the right-hand side of the poll section.

A blank poll box will appear, and you can design your poll here. It will look like this:
Let’s work our way through each of the options on the poll form

<table>
<thead>
<tr>
<th>Item</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a title for this poll</td>
<td>Enter a meaningful name for your poll. This makes it easier to identify when you need to launch it in your meeting. For example, if my poll is intended to get feedback on the meeting, the title of my poll might be <strong>Meeting feedback</strong>.</td>
</tr>
<tr>
<td>Anonymous?</td>
<td>When you have run your poll, your results will always be anonymous. All you will be able to see are results as percentages.</td>
</tr>
<tr>
<td></td>
<td>This <strong>Anonymous</strong> box refers to how your results might appear on any reports that are run outside of the meeting. From your account on the Zoom website, you do have the option to obtain a report of all the poll results. We won’t be covering this here, as it is a more complicated process. In most cases, you won’t need to run a report.</td>
</tr>
<tr>
<td></td>
<td>Ticking the <strong>Anonymous</strong> box means that, if a report is run, it will not contain any names. All names will be anonymised.</td>
</tr>
<tr>
<td></td>
<td><strong>Please ensure that this box is checked</strong>. This will ensure that you are complying with Board of Trustees rulings, and that you avoid any issues relating to GDPR.</td>
</tr>
<tr>
<td></td>
<td>If you need to record your results, just make a note of them in the meeting, and add them to your minutes.</td>
</tr>
<tr>
<td>Type your question here</td>
<td>You will see a number next to this box. This is your question number.</td>
</tr>
<tr>
<td></td>
<td>You can now type in your question. Try to keep questions short and focused. You are limited to 255 characters for each question.</td>
</tr>
</tbody>
</table>
| Single choice / Multiple choice | For each question, you can choose one of two formats:  
  - Single choice  
  - Multiple choice                                                                                                                        |
|                          | **Single choice**  
  Your members will be restricted to choosing just one of the options listed.                                                                                                                     |
|                          | **Multiple choice**  
  Your members can choose multiple items from the options listed. This is a bit like a checklist.                                                                                                    |
**Item** | **Guidance**
---|---
**Answers box** | Use one line for each option. You need at least two options and can include up to 10 options. Use as many lines as you need and leave the rest as they appear. You are limited to 255 characters for each option.

**+ Add a question** | You are able to have more than one question in your poll. At the bottom of the box, you will see a **+ Add a question option**. Click on this to add another question.

If you decide not to include one or more of your questions, you can use the **Delete** option at the bottom of each question box. In the image below, you will see my first question.
As you add questions, the question before will collapse to show just the question, and not the options.

This is how my second question looks:

You will notice that, next to each collapsed question, there are options to Edit or Delete that question.

Once you have added all your questions, remember to save your poll using the Save button at the bottom of the poll box.
If you decide not to go ahead with the poll you have set up, you just need to click on the **Cancel** box at the bottom of the form.

Once your poll has been saved, you will be taken back to your meeting page. At the bottom, in the poll section, you will see details of your poll(s).

You will see:

- The title of your poll
- The total number of questions
- Whether your poll is marked as **Anonymous**.

From here, you can choose to **Edit** or **Delete** your poll, using the buttons on the right-hand side of the poll line.

At the beginning of the row for your poll, you will notice a small down arrow. If you click this, the line will expand and you will see details of your questions and options.
You will notice that after each question, there are details relating to what type of question was chosen. In this example, both questions are **Single Choice**.

The arrow next to the poll title is now in an up position. If you click on this, the line will minimise (or collapse) once again.

To add another poll, you just need to click on the **Add** button again. This is now at the top right-hand side of the poll box (on the meeting page).

I have created a second poll. This time, my poll consists of one question, and my members can choose as many options as they like. This is a **Multiple-Choice** question. This is what it looks like:

![Poll Interface](image)
The poll box on my meeting page now looks like this:

If I expand the second poll, it will look like this:

You will see that the question has been identified as a **Multiple Choice** question. Your polls will be saved on your meeting page. You can return to them to edit or delete at any time prior to your meeting.
4: Launching a poll in your meeting

Now that your poll(s) have been set up, they will be ready to launch during your meeting. Remember that you will need to host your meeting from the desktop app, if you want to launch a poll. Polls can’t be launched from mobile devices like tablets (iPad or Android) or mobile phones.

The easiest way to launch your meeting from the desktop app is to start your meeting from the meeting page on the website.

Either you, as the host, or your co-host can launch the poll.

To preview or launch your poll, you just need to click on the Polls icon at the bottom of the screen.

If you don’t see the icons at the bottom of the screen, just hover your mouse over that area, and they will appear.

When you click on the Poll option, a box will appear showing you a preview of your first poll. If you have more than one poll, click on the down arrow to the right of the title for the poll that is showing. A menu will appear showing you all the polls for your meeting. Just click on the one you’d like to preview or launch.
At the bottom of each poll, you will see an option to Launch poll. When you’re ready to launch your poll, click on this button.

I’ve launched my second poll. Once your poll has launched, the heading will turn green. The poll will appear on everyone’s screen, and your members will be able to answer your poll questions.

Next to the poll title, you will see a timer. This provides you with an indication of how long your poll has been shared with your members (in minute and seconds).

As members complete the question(s) in your poll, you will see the percentages change. This example shows the results of my first poll, as they come in.
You will still be able to communicate with everyone in the meeting, and you can ask if anyone needs more time. Once you are happy that everyone has had an opportunity to complete the questions, you just need to click on the **End Polling** button at the bottom of the box.

### 5: Poll results

When you click the **End Polling** button, you will be able to see the results. At this point, you will be the only person who can see the results.

You will now see two buttons at the bottom of the box.

- **Share results**
- **Re-launch Polling**

In the next two sections, we will explore each of these options
6: Share results

If you’d like to share the results with your members, click on the Share results button. The results box will appear on everyone’s screens.

When you are ready to stop sharing, click the Stop Share Results button at the bottom of the box. The results will anonymous. Everyone will just see the results as percentages.

7: Re-launch Polling

You can re-launch your poll by using the Re-launch Polling button at the bottom of the box. Take note that, if you do this, all your original results will be cleared. You won’t get them back. Be sure that this is what you want to do. A warning will appear to ensure that you’re happy to proceed. If you are, then relaunch your poll.
Click **Continue** to re-launch your poll. The poll will reappear on everyone’s screen, with the previous results cleared. You can now proceed with your poll.

Using Zoom polling does take some practice. If you want to experiment:

- Set up a test meeting
- Add one or more polls
- Invite a couple of people to join your test meeting to test out your polls.