

## How to Create Zoom Polling Templates

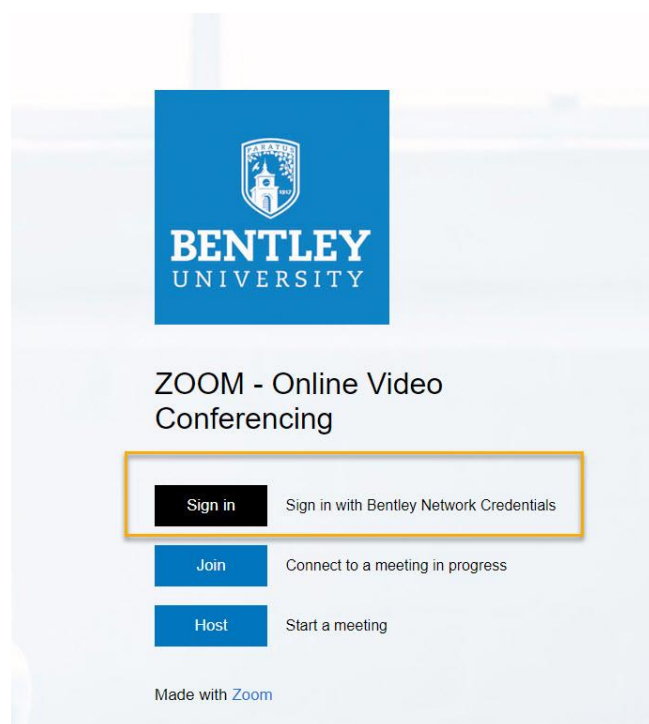
To create a zoom poll template for multiple meetings, you will first need to do either of the following:

- **Create a Zoom Meeting and add a new Poll**

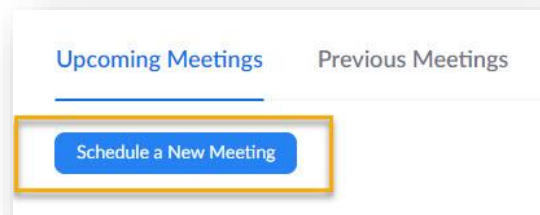
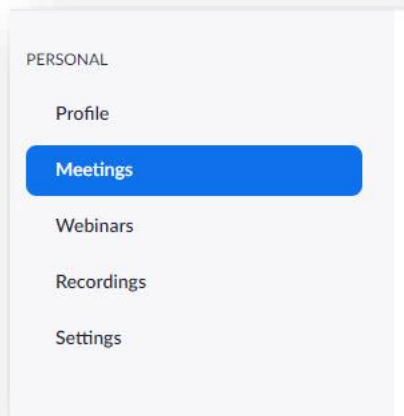
or

- **Open a Pre-Existing Meeting with a Poll that has already been created** (Skip to page 3)

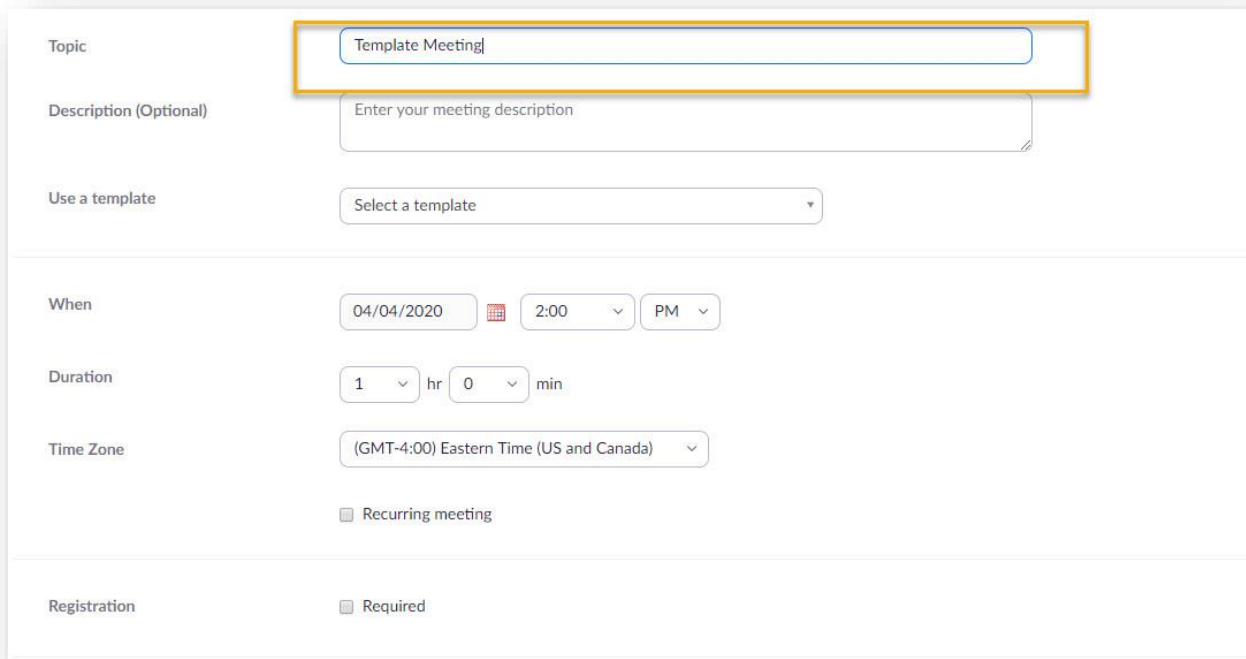
To create a new meeting template with a poll attached, go to Bentley.Zoom.us and select “**Sign In**” with Bentley Credentials.



Once you have logged into your Bentley Zoom Profile, you should select the “Meetings” tab in the left hand panel and then select “Schedule a New Meeting”.



Enter your general meeting details but remember, this is just a template, you will be using these settings as just a baseline and will be able to adjust as needed when you use it.



A screenshot of the Bentley Zoom meeting scheduling form. The form is divided into several sections:

- Topic:** A text input field containing "Template Meeting" is highlighted with a yellow border.
- Description (Optional):** A text area with the placeholder text "Enter your meeting description".
- Use a template:** A dropdown menu with the text "Select a template".
- When:** A date input field showing "04/04/2020", a time input field showing "2:00", and a PM/AM dropdown menu.
- Duration:** Two dropdown menus for "hr" (set to 1) and "min" (set to 0).
- Time Zone:** A dropdown menu showing "(GMT-4:00) Eastern Time (US and Canada)".
- Recurring meeting:** A checkbox labeled "Recurring meeting" which is currently unchecked.
- Registration:** A checkbox labeled "Required" which is currently unchecked.

After filling in your general details, select **“Save”**

Alternative Hosts

Example: mary@company.com, peter@school.edu

Save Cancel

You will be brought to the meeting summary page.

My Meetings > Manage "Template Meeting"

Start this Meeting

Topic: Template Meeting

Time: Apr 4, 2020 02:00 PM Eastern Time (US and Canada)

Add to: Google Calendar, Outlook Calendar (.ics), Yahoo Calendar

Meeting ID: 281-026-241

Meeting Password: Require meeting password

Invite Attendees: Join URL: <https://bentley.zoom.us/j/281026241> Copy the invitation

Video: Host On, Participant On

Audio: Telephone and Computer Audio, Dial from United States of America

Meeting Options:
 

- Enable join before host
- Mute participants upon entry
- Enable waiting room
- Only authenticated users can join
- Record the meeting automatically

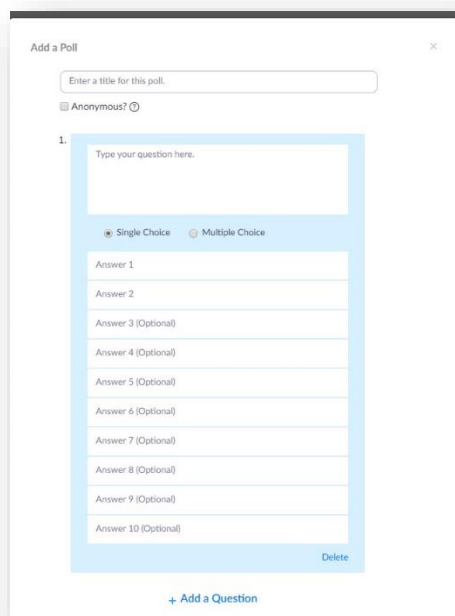
Help

**Note:** If you already have a meeting created that you would like to use as your template, select that meeting **“Topic”** in your meeting list and it will bring you to your meeting summary page as well.

Start Time	Topic	Meeting ID	Start	Delete
Today 02:00 PM	Template Meeting	281-026-241	Start	Delete

At the bottom of your meeting summary page, you will see both options for

## Adding a poll



Record the meeting automatically

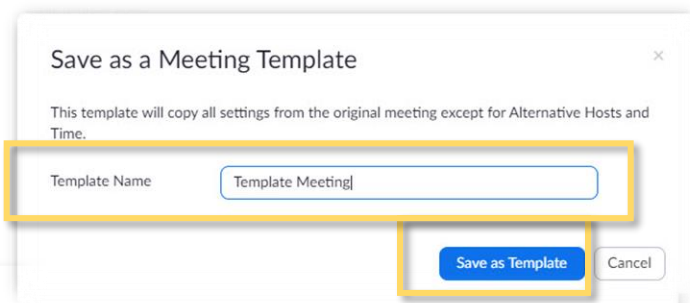
Delete this Meeting Save as a Meeting Template Edit this Meeting Join Now

You have created 1 poll for this meeting.

Title	Total Questions	Anonymous	
▼ Poll 1:Test Poll	2 questions	No	Edit Delete

Add

## And saving this meeting as a template.



Record the meeting automatically

Delete this Meeting Save as a Meeting Template Edit this Meeting Join Now

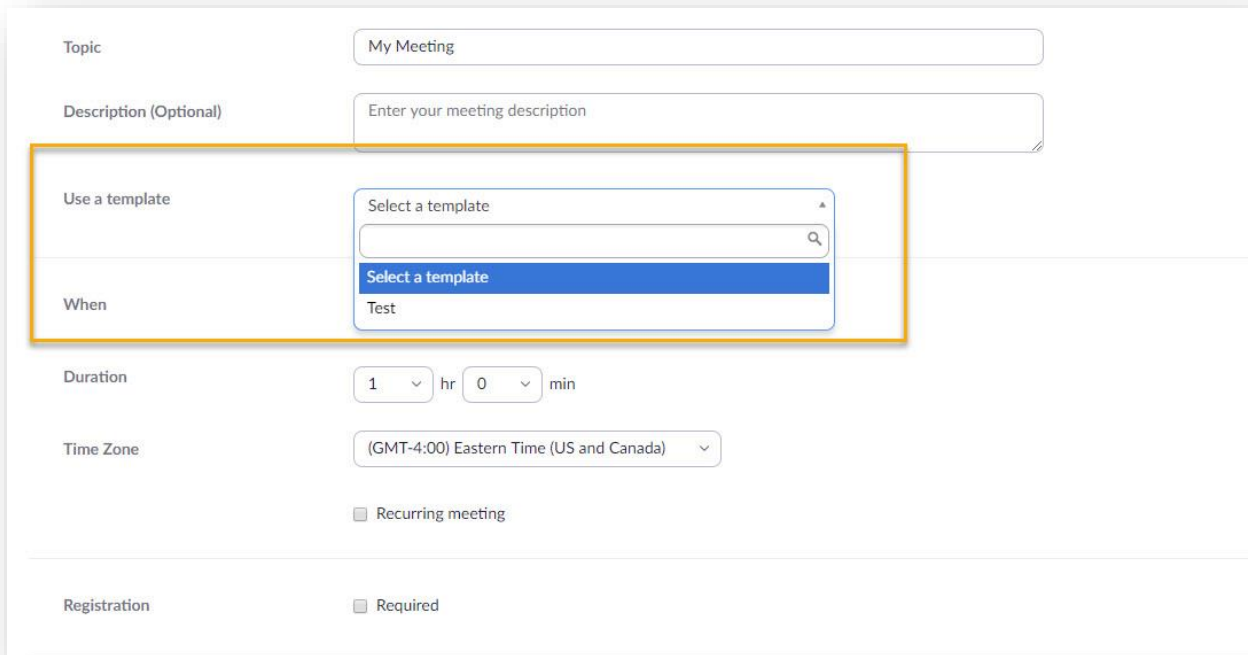
You have created 1 poll for this meeting.

Title	Total Questions	Anonymous	
▼ Poll 1:Test Poll	2 questions	No	Edit Delete

Once you have created your poll and saved your meeting as a template with the poll attached:

- go back to your **“Meetings”** tab
- select **“Schedule a New Meeting”**

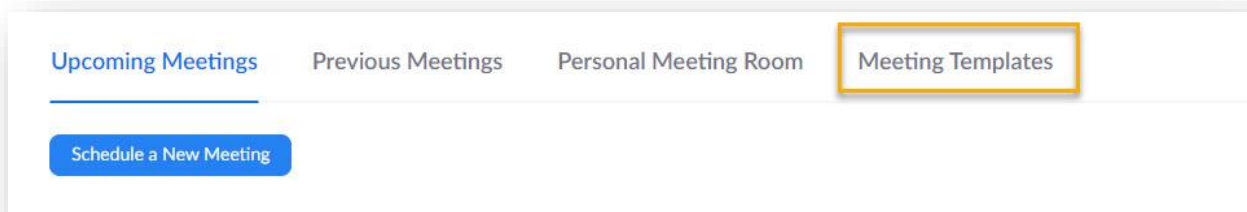
From there, you will have the option to use your new meeting template 😊



The screenshot shows a meeting scheduling form with the following fields:

- Topic: My Meeting
- Description (Optional): Enter your meeting description
- Use a template: A dropdown menu with the text "Select a template" and a search icon. The dropdown is open, showing a search bar and a list item "Test".
- When: A date and time selector.
- Duration: 1 hr 0 min
- Time Zone: (GMT-4:00) Eastern Time (US and Canada)
- Recurring meeting:
- Registration:  Required

If you ever need to edit your meeting template or polling questions, select your **“Meetings”** tab in your profile panel and then select **“Meeting Templates”** 😊



The screenshot shows the profile panel navigation tabs:

- Upcoming Meetings
- Previous Meetings
- Personal Meeting Room
- Meeting Templates (highlighted with a yellow box)

Below the tabs is a blue button labeled "Schedule a New Meeting".

You have saved 1 template(s) so far. You can save up to 40 templates.

Template Name	Modify Time	Action
Template Meeting	Apr 4, 2020 02:27 PM	<a href="#">Schedule Meeting with this Template</a> <a href="#">Delete</a>