

# The essential Admin guide

## Getting started

Customize the Poll Everywhere presenter experience to fit your organization's unique needs. By adjusting admin settings in advance, you can standardize and streamline activity creation. Make sure that activities meet your branding, privacy, and tech standards and allow presenters to collaborate seamlessly.

As an administrator, you can:

- Configure account settings
- Install the Poll Everywhere app for your organization
- Invite presenters

- Add presenters to Teams
- Share activities
- Enable the single sign-on integration (SSO) if applicable
- Set template activities
- Customize the branded response page
- Adjust data retention policies

*Learn more by reviewing or attending a Poll Everywhere webinar.*

## Configuring account settings

### Import participants

The account admin panel, accessible via the gear icon and Account admin, is where you can control presenter access, activity defaults, and participant settings.

The Manage presenters tab lets you see presenter activity at a glance, assign admins, manage pending invitations, and organize presenters in Teams.

From the Account settings tab, admins can configure default response and participant settings, apply a template activity to unify branding guidelines across the account, adjust privacy preferences, and more.

- **Activity settings** have to do with setting default settings related to activities overall (i.e. how people can respond, response settings, etc..)
- **Participant settings** let you choose how you would like to identify participants responding to activities presenters share
- **Other settings** include enabling features like Teams, pinned activities, and other options

**Authentication** allows you to turn on single-sign on (SSO) for your organization if applicable.

On **Plan details**, you'll see a summary of your plan as well as the option to change it.

**Payment method** and **Order history** give you the option to manage your payment history.

## Installing Poll Everywhere

### Import participants

Allow presenters to embed Poll Everywhere activities directly into their PowerPoint, Keynote, and Google Slides decks by downloading the Poll Everywhere slideware apps for your organization.

For further information on Powerpoint for Mac, as well as Google Slides and Keynote, visit [polleverywhere.com/app](https://polleverywhere.com/app).

If your IT team is forming a plan to roll out the Poll Everywhere app for Windows PowerPoint to multiple devices, you may want to try our MSI deployment process:

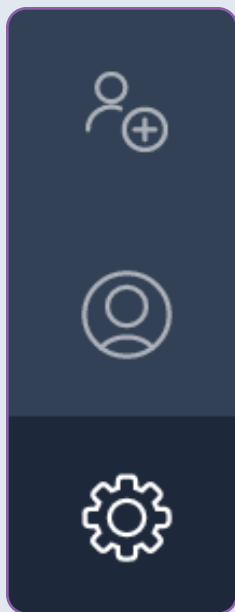
1. [Install Microsoft .NET Framework 4.5.2](#)
2. [Install Visual Studio 2010 Office Runtime 4.0](#)
3. [Install the Poll Everywhere MSI](#)

## Inviting and removing presenters

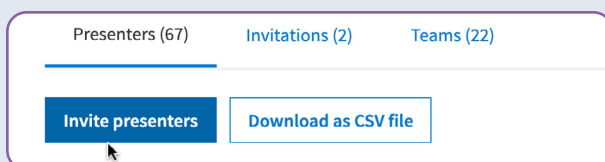
Adding presenters to your Poll Everywhere account allows you to share premium features, configure account-wide settings that apply to everyone, and establish consistent branding across all activities.

### Adding presenters to your account

**Step 1.** To add a presenter, go to your Account Admin settings by clicking on the gear icon at the bottom left of the page.



**Step 2.** Click 'Invite presenters'.

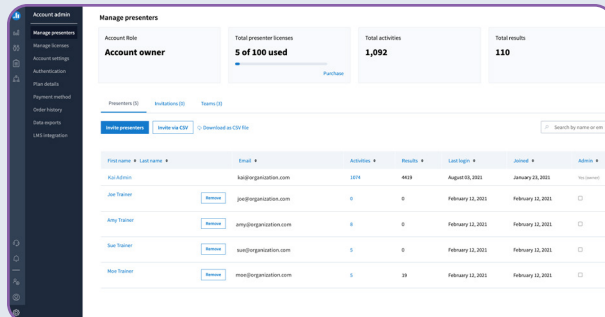


**Step 3.** Enter the email addresses of the people you wish to add as users to your account in the text box. Place each email address in the invitation box, with each email separated by a comma.

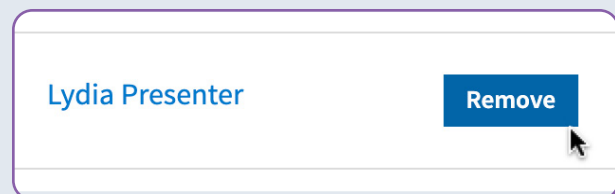
A screenshot of the 'Invite Presenters' modal form. The modal has a blue header with the title 'Invite Presenters' and the subtitle 'Enter email addresses to invite collaborators'. Below the header, there is a text box for email addresses. Above the text box, it says '929 available'. Inside the text box, there is a placeholder text: 'Use commas to separate emails' followed by 'sample@school.edu, hello@email.com'. Below the text box, there is another text box labeled 'Add a message (optional)'. At the bottom of the modal, there are two buttons: a blue button labeled 'Send invitations' and a white button with a blue border labeled 'Cancel'.

Under the **Presenters** tab, you will see accepted invitations. You can view the number of activities and the last login for each. You can also grant admin privileges to a user by checking the box next to their name

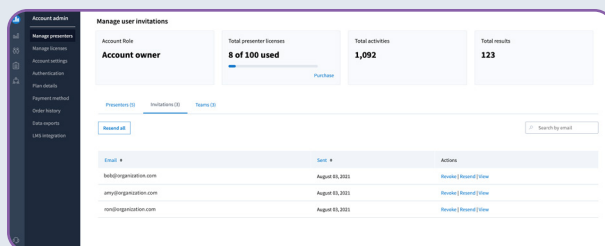
in the Admin column. Warning: presenters with admin privileges can make changes to and delete other presenters' activities.



*Note: You will lose all access to the presenter's activities and data. They will be given a free account and retain access to any activities and data associated with their account, but will not have access to your account.*



Under the **Invitations** tab, you will see pending invitations that have not yet been accepted. You can right click on 'View' and copy/paste the link to send the invitation through your own email account. This is useful if the original invite has trouble getting through spam filters.

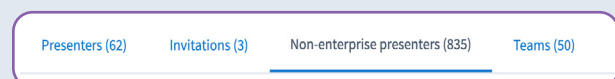


Under the **Non-enterprise presenters** tab, you can view a list of presenters who have signed up for their own Poll Everywhere accounts using their organization emails. Click on "Invite" next to each presenter's information to send one invitation at a time, or export the CSV report to import several presenters at once.

*Note: Your CSV will be delivered via email when it's ready to download.*

To remove a presenter, click the Remove button near the individual presenter's name. You'll see a confirmation message. Click "Permanently remove presenter" to complete the process.

When presenters receive your invitation to join the company-wide account, they will need to accept the invitation by clicking on the link in the email.



## Creating Teams

Teams allow presenters to share activities with each other. Activities shared with a Team may be viewed, reported and presented by all members of the team. Only account administrators may create and edit Teams, while Team managers can only edit existing Teams. Presenters on a Poll Everywhere account with Teams enabled can be in multiple Teams.

### Creating a team

**Step 1.** Log into your account, click on the **Teams** icon on the left side of the page. Only admins may create Teams.



**Step 2.** Click the **New Team** button.

**Teams**

Welcomes to Teams in Poll Everywhere. Teams allow presenters to share activities with each other. Activities shared with a team may be viewed, reported and presented by all members of the team. Only account administrators may create and edit Teams. Learn more about [Teams](#).

To share a group of activities with a team, go to the [My Polls](#) page and hover over a group of activities, then click on "Share". Learn more about [Sharing activities](#).

New team

Team name	Total team members
Communications	3
IT	1
Marketing	3

**Step 3.** In the pop-up window, name your Team then click the **Create** button.

**Create new team**

Cancel

Create

You're now ready to add users to your Team.

### Adding presenters to a Team

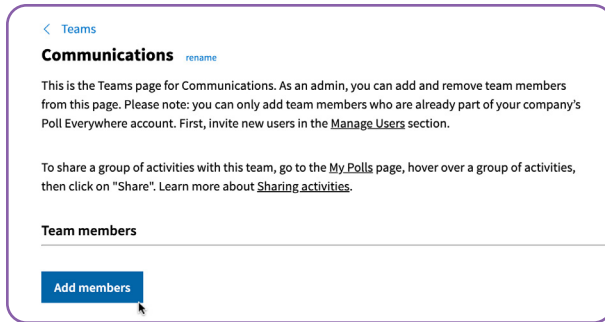
**Step 1.** Log into your account and click on the **Teams** icon on the left side of the page. Only admins may create Teams.

**Step 2.** Select which Team you want to add presenters by clicking on the **name of the Team**. Presenters may only be added to one Team at a time, but may be in multiple Teams.

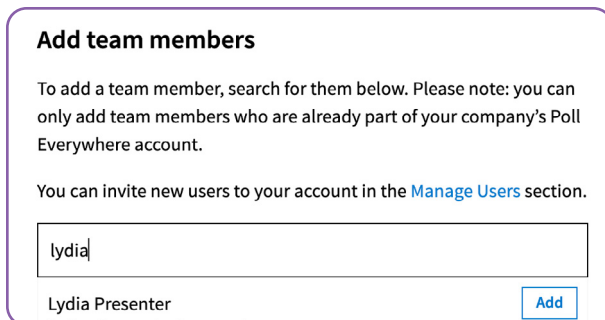
**New team**

Team name	Total team members
Communications	3
IT	1
Marketing	3

**Step 3.** Select the **Add members** button on the specific Team page.



**Step 4.** Decide which presenter you want to assign to a Team. Search for those presenters by name or email address. Click the Add button to the right of the search results to add to the team. Presenters are not added until clicking the Save button on the top right of the page.



*Congratulations! You've now assigned your first presenter(s) to a Team. Add more people to this Team to allow them to share and collaborate on activities.*

*Note: When a presenter is added to a Team with*

*Shared activities, they will immediately get access to all activities shared with the Team.*

## Acting as a Team manager

A Team can have multiple managers, and users may be managers of any number of Teams.

*Note: Team managers cannot add new users to an organization's account or create new Teams.*

Team managers can perform any one of these three actions:

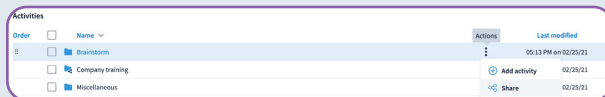
- Add presenters to their Team that are already presenters within the organization's account. Only account admins can invite new presenters to an account.
- Remove presenters from a Team.
- Designate additional Team managers within their Team by navigating to the Teams tab, selecting a Team in which they are a manager, and then clicking the checkbox under the Team Manager column.

Team Manager ▾	Actions	
Yes (account admin)	Reset activities	Remove
<input checked="" type="checkbox"/>	Reset activities	Remove

## Sharing activities

Once an account administrator has set up Teams, any presenter on the account may share activities with their Team. All users must be part of a Team to share activities with that Team. Only the creator of an activity may share it with others.

**Step 1.** Put the activities into Folders. Near the name of the Folder, click the dropdown Actions menu followed by **Share**.



**Step 2.** Select the Team(s) to share the activities with all presenters in the Team. All presenters within those Teams have the ability to present, but are unable to edit the activities.

### Share Presentation feedback group with teams

Select the teams with whom you would like to share this folder.

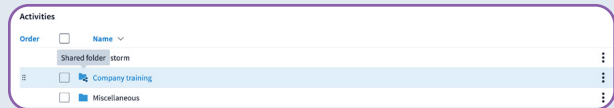
☐ Everyone at Account

☒ Communications

☐ IT

☒ Marketing

**Step 3.** The share icon will appear next to any and all Folders that are shared. Click on **Share** in the dropdown menu to stop sharing or to confirm who it is shared with.



Any activities added to the activity Folder will immediately be shared. Any new presenters added to the Team will also immediately get access.

Any number of presenters may collect responses on the same activity simultaneously without interference between activities. Results will be tied to each individual presenter, so presenters can run their own independent reports on the shared activities.

## Enabling the single sign-on integration (SSO)

We offer SSO via SAML or Shibboleth.

With this integration you will have better control over user provisioning and access.

SSO integration will be facilitated by a Poll

Everywhere Customer Success Manager alongside a member of our client services engineering team.

If you would like to inquire about SSO, contact our sales team at [sales@polleverywhere.com](mailto:sales@polleverywhere.com).

## Setting account-wide visual settings for activities

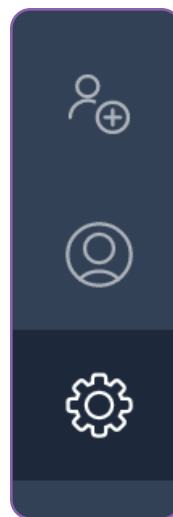
From the Account settings tab on your Account admin panel, administrators can set a template activity and apply it to all presenters on the account. When a new activity is created, it will follow the same branding presets and configurations (i.e. color schemes, font, logos, etc..)

Here's how to create a template:

**Step 1.** Set up one activity exactly the way you like. Make sure to set the visual settings, response settings, and lock settings.

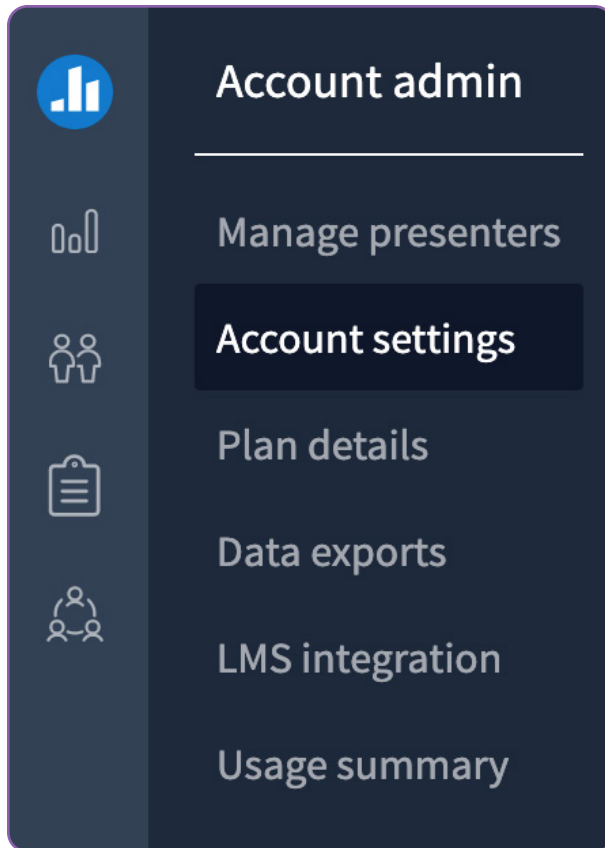
*Helpful tip: It's best to use a multiple-choice type, so you can choose the look of the labels and bars too.*

**Step 2.** After you have created an activity you would like to use as your template, click the gear icon in the bottom left corner and select **Account admin**.

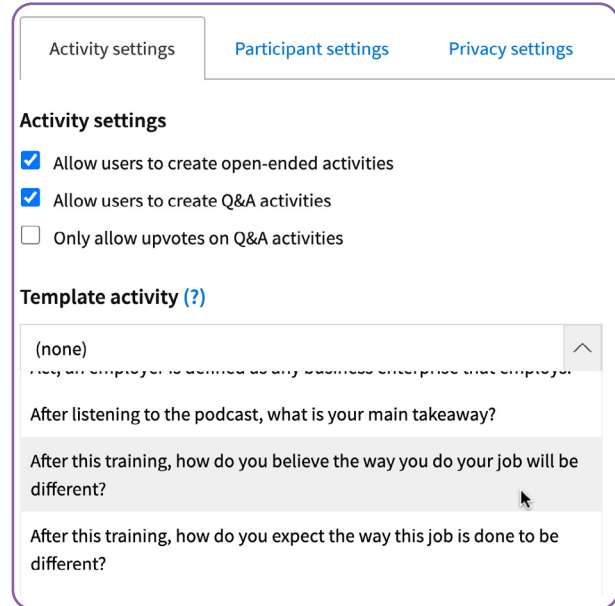




**Step 3.** Head to your [Account settings](#) in the account admin panel.



**Step 4.** Select the activity you prepared as your template and then click [Save](#) at the bottom of the page.

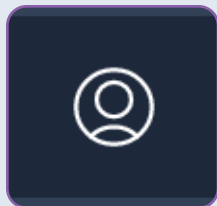


*Helpful tip: An activity template set at the account level does not supersede those created by the individual percenters. It gives them a baseline to start from, but they are still able to create a personal template specific to their needs.*

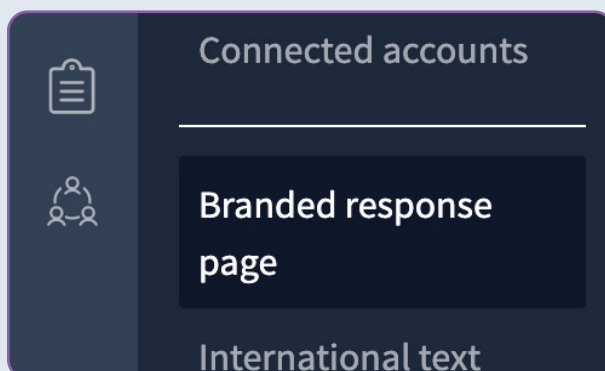
## Customizing the branded response page

The branded response page allows you to personalize the branding of your unique PollEv.com page. You can edit the color of the various page elements, change the text on the wait screen, and even replace the Poll Everywhere logo on the wait screen with your own.

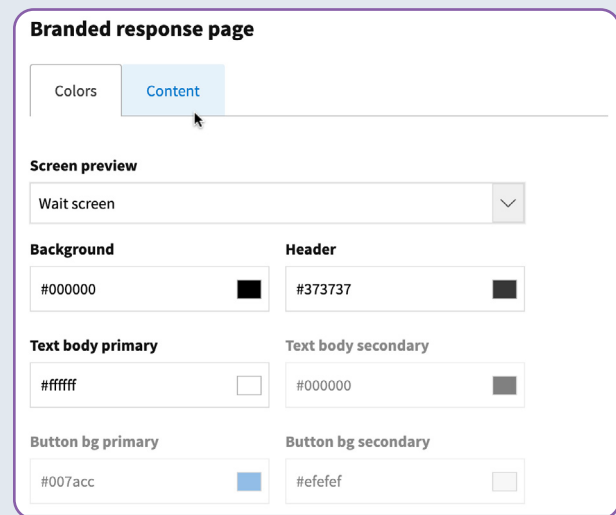
**Step 1.** Click on the profile icon in the bottom left corner of your Activities page. then select My settings.



**Step 2.** Select Branded response page in the settings menu on the left.



The Branded response page has two tabs: Colors and Content.

A screenshot of the 'Branded response page' settings interface. It has two tabs: 'Colors' and 'Content'. The 'Content' tab is selected. Below the tabs is a 'Screen preview' dropdown menu set to 'Wait screen'. Underneath are six color selection fields arranged in two columns. The left column contains 'Background' (#000000), 'Text body primary' (ffffff), and 'Button bg primary' (#007acc). The right column contains 'Header' (#373737), 'Text body secondary' (#000000), and 'Button bg secondary' (efefef). Each field has a color swatch next to the hex code.

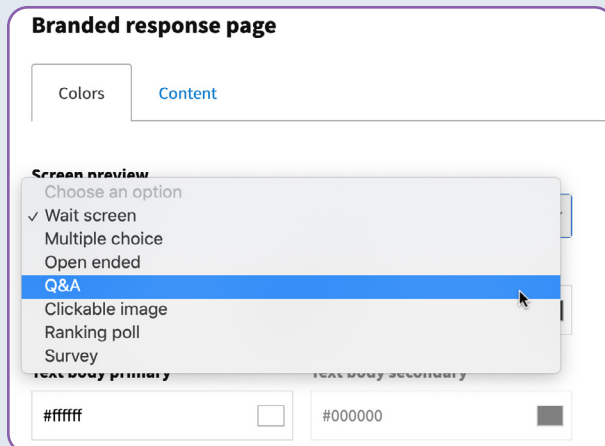
### Colors tab

The colors tab allows you to customize many elements of your response page.

*Helpful Tip: If a section is grayed out, that means that area of the selected screen is not available for customization. For example, if the wait screen is selected in the Screen preview, the button customization areas are grayed out because the wait screen doesn't have any buttons.*

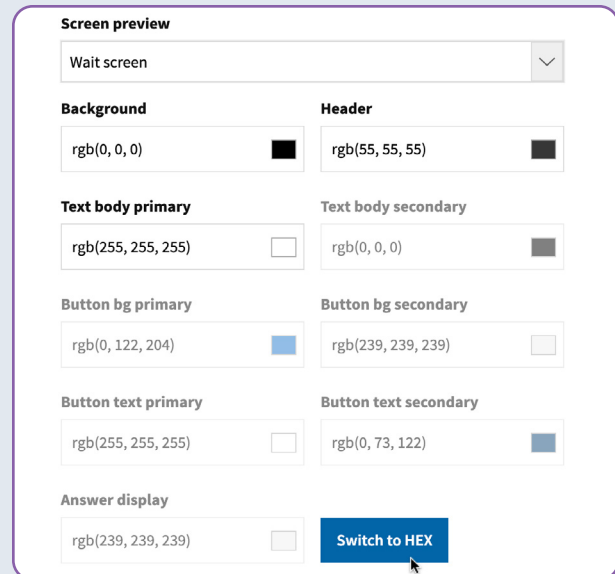
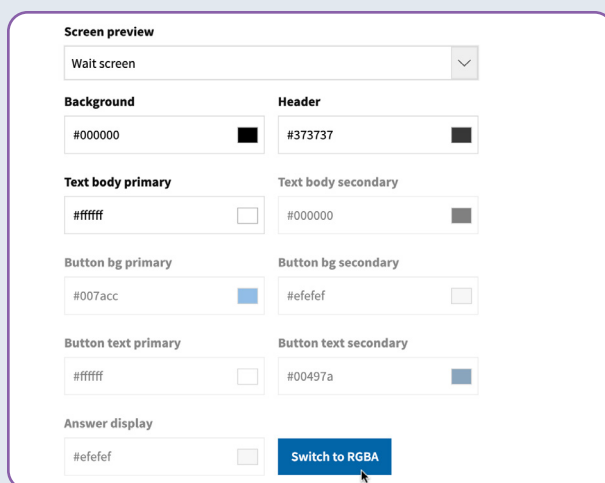
## Screen preview

The screen preview dropdown list allows you to specify which screen you want to customize. You can select the wait screen or any of the activity types (e.g. Multiple choice, Q&A, etc.)



## Switch to RGBA/HEX

Near the bottom of the page is a button which lets you choose which color code format you want to use.



## Reset to default

Always handy, the Reset to default button near the bottom of the page will revert all your color selections back to the Poll Everywhere defaults.

## Content tab

The content tab allows you to upload a custom logo, change the wait screen title, and even customize the content of the description.

**Branded response page**

Colors Content

**Wait screen logo**

logo.png

Select

**Wait screen title**

You seem like you're ready for the party!

**Wait screen description**

As soon as there's a live poll, you'll be able to participate right here. Hang tight.

☐ Apply these settings to all presenters (62)

Save Cancel all changes

## Applying changes account-wide

As the account owner or admin, you will see a setting to apply to all presenters on the account at the bottom of both the Colors and Content tabs. With that selected, the changes you make on this screen will become the new default for everyone on the account. Individual presenters can still customize their own preferences.

*Note: Changing the logo here only affects the wait screen, not your activities.*

## Data retention features

The branded response page allows you to personalize the branding of your unique PollEv.com page. You can edit the color of the various page elements, change the text on the wait screen, and even replace the Poll Everywhere logo on the wait screen with your own.

Poll Everywhere offers configurable settings to automatically delete data after set periods in an effort to limit how long data is stored on Poll Everywhere servers.

Types of data that can be selected for automatic deletion after a set number of days:

- Activities – the activities that presenter create
- Results – the responses provided by audience members
- Users – the presenters on the account
- Participants – the audience members who respond to activities

This data can be deleted after a set number of days of inactivity. Any presenter, participant, or activity that is removed through this process will have all of the associated data deleted.

To adjust your data retention policy within Poll Everywhere, head to [Privacy settings](#) under your Account settings.