

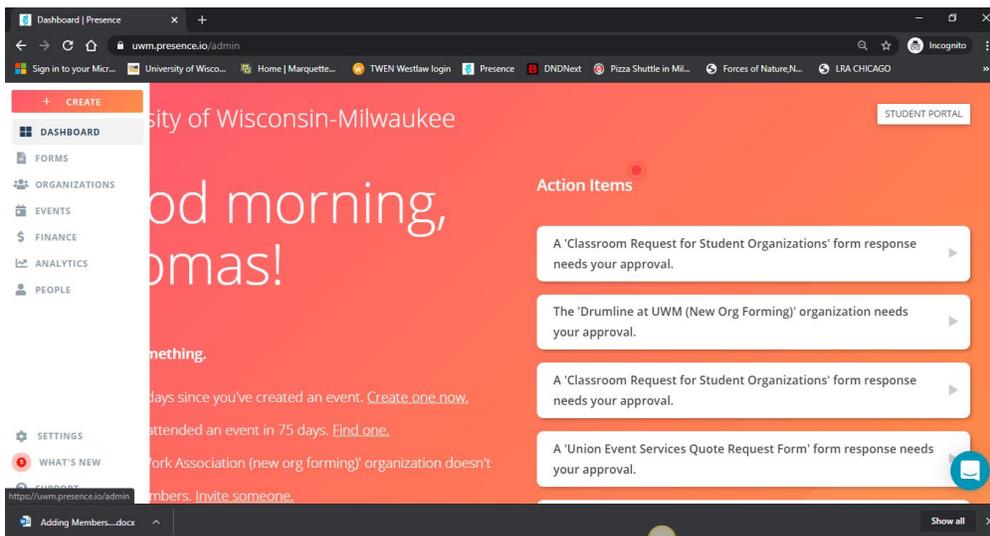
Building an online election ballot in Presence

Before you create a ballot for elections, make sure the membership roster in Panther Presence is current and all invitations to join have been accepted.

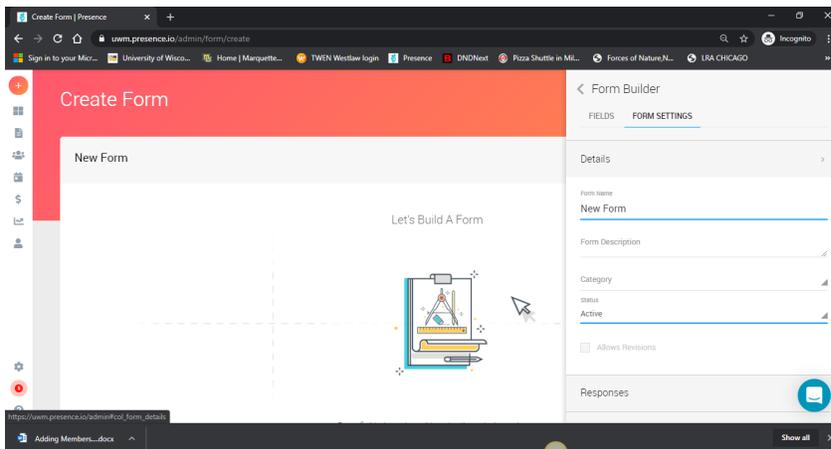
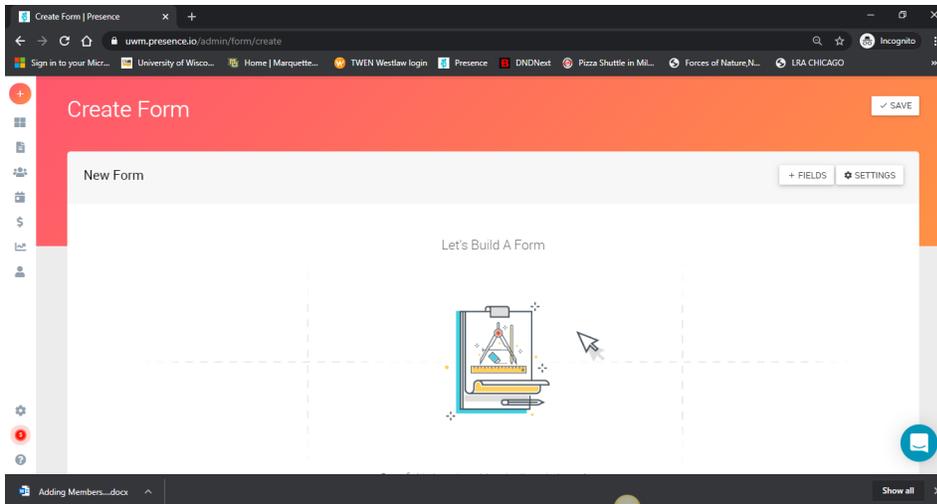
Only current organization officers can create forms specific to the organization.

There are two sets of tools you use to create a form. The first is **Settings** and the second is **Fields**.

After logging into Presence, select the dashboard button. At the top left there is a **create** button. From the list of creation options, select **Form**.



You begin creating a new form with the **Settings** tools.



The Form Settings tool has a series of sections to be filled out. The first is Details which includes the name of the form, a description of the form, form category and status. For an election ballot, make sure the form name is clear for future reference such as **“FROGS at UWM Spring 2020 Election Ballot.”** From the category list select **Organization Administration**. You will determine the status if the form is to be seen or not. While developing the form, keep it in *Draft* status. When you are ready to make the form available, change status to *Active*.

Form Builder

FIELDS FORM SETTINGS

Details >

Form Name
FROGS at UWM Spring 2020 Election Ballot

Form Description
Use this form to vote for new officers for FROGS

Category
Organization Administration x

Status
Active

Allows Revisions

Go to the top of the page and select “save” frequently to save your changes.

After Details is **Responses**. For an election ballot, we recommend that you leave this setting as is.

After Responses is **Visibility**. Elections are typically anonymous so select anonymous. When you make the form available to members only, individuals appearing in the organization roster will be the only people able to vote. Be sure that you attach this form to your organization so that only members can see it and vote.

Responses	>
Visibility	>

Login

Require Login

Anonymous

Location

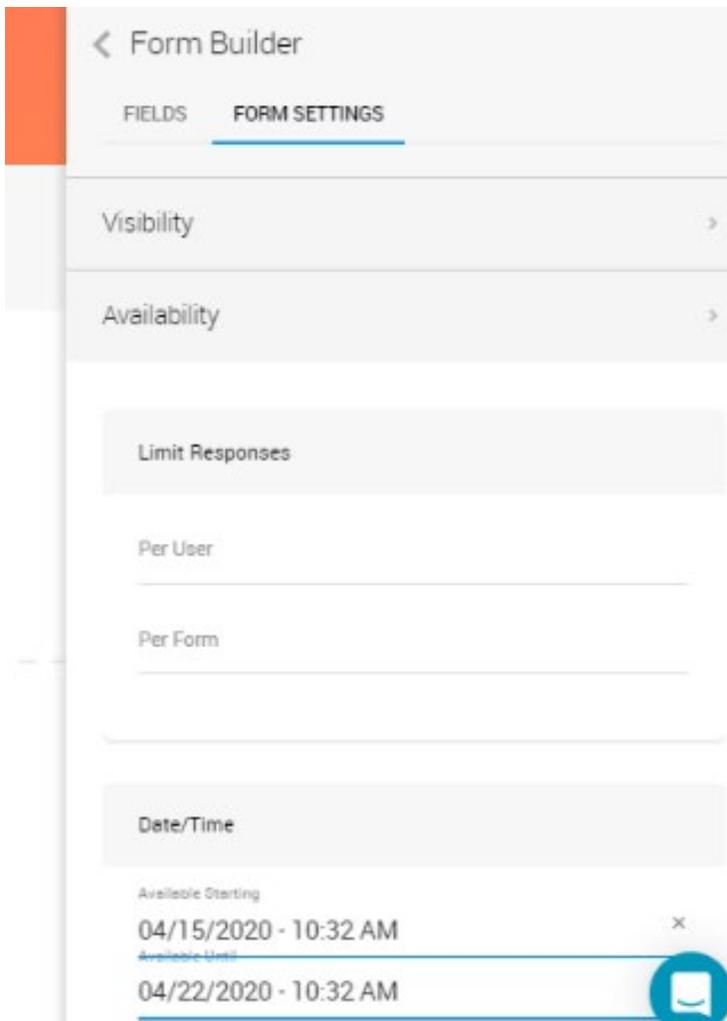
Respond From Admin

Attached to Organization

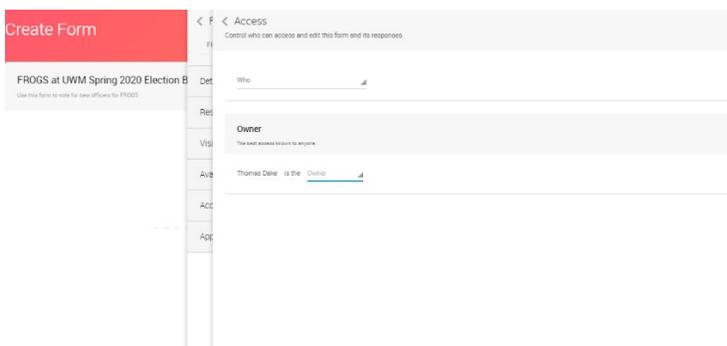
Attached Organization(s)

FROGS at UWM x

After Visibility is **Availability**. The only items to set under Visibility is the Availability start and end dates.



After Availability is **Access**. Here you can identify who, besides the “owner” (creator) of the form can edit it. For elections, you typically want those individuals who are overseeing the elections to have access (as long as they are not running for a position as well).

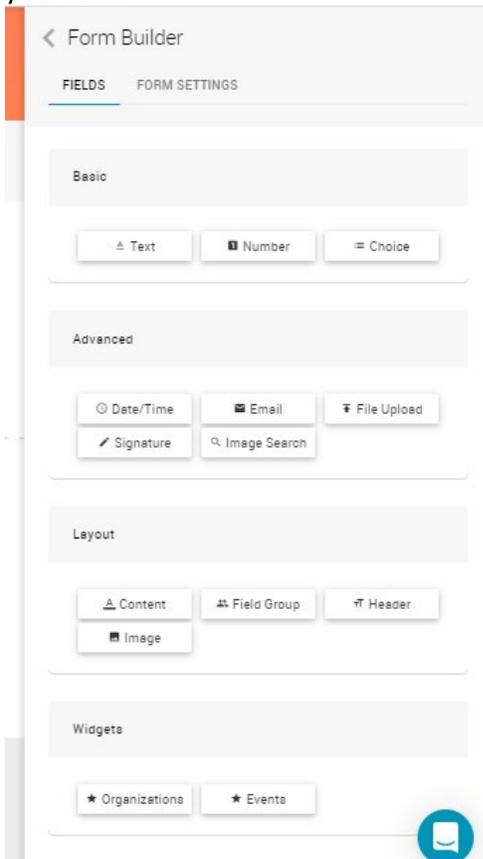


After Access is **Approvals & Notifications**. For elections, leave this section as it is.

Go to the top of the page and select “save” frequently to save your changes.

You are now done with **Settings** and can move to the data **fields** you need in your ballot.

The tools labeled as Fields outline the different ways you can structure questions and information in your form.



In the case of each tool, click and hold the field you wish to add and drag it to the form and release. Positioning before you release can be an issue. Do not be discouraged if it takes a couple of tries to find the “sweet spot” for fields to land in.

For an election ballot, we recommend the following fields:

Content—This tool gives you a text editor in which you can place information for users to see. An introduction to the election process, any specific instructions for voting and the closing date of the ballot can all be added here.

Save changes.

Choice—This field allows you to set up a question with a list of potential answers. Of course, the most common question, or something similar, will be: “Who do you want to vote for to be President of our organization?” After you have entered the question, you can create a list of responses that the voter may choose from. Experiment with the options for choices such as Dropdown, List Options and

Checkbox. For most election ballots, Checkbox set with “select only one” is likely the best setting.

Save changes.