

# Office of Student Activities

## presence Guides

### How to create a form for elections

Choosing a new set of officers is an important step in the long-term health of your organization. Forms through Presence are an easy way to create a ballot for elections of your organization's officers. Follow the steps below to make a ballot that you can send out to your members to help make for an easy transition of leadership when it's time to select new leaders.

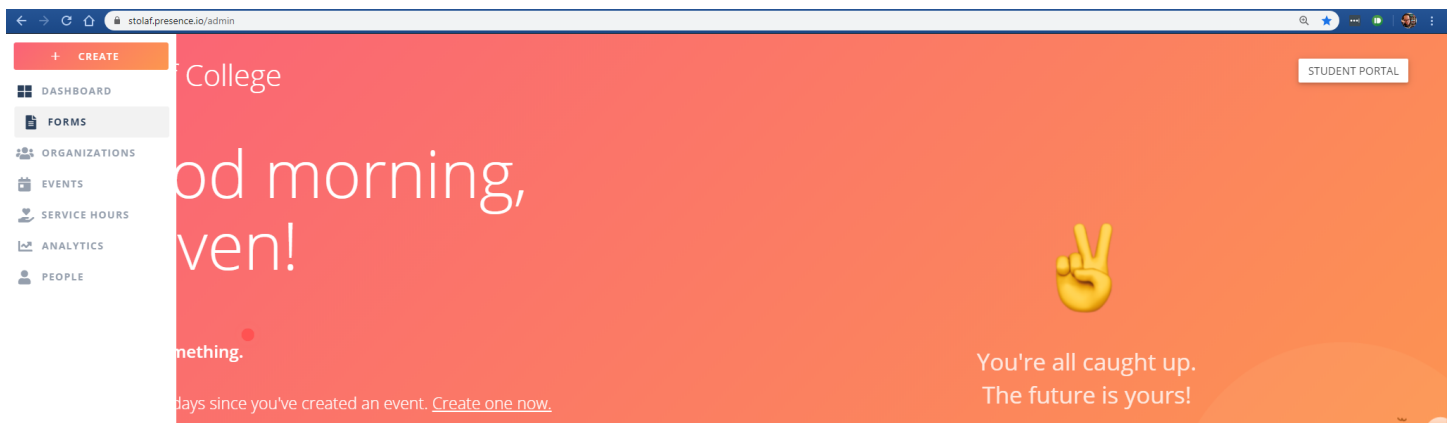
#### Step 1:

Log in at [stolaf.presence.io/admin](http://stolaf.presence.io/admin) with your St. Olaf Username and Password.

- If you are unable to login and are an officer in your organization, please email [osa@stolaf.edu](mailto:osa@stolaf.edu) with the organization name and your position within that organization.

#### Step 2:

Move your mouse to the left side of the screen and a menu will expand and list "Forms". Click on "Forms", as seen below.



#### Step 3:

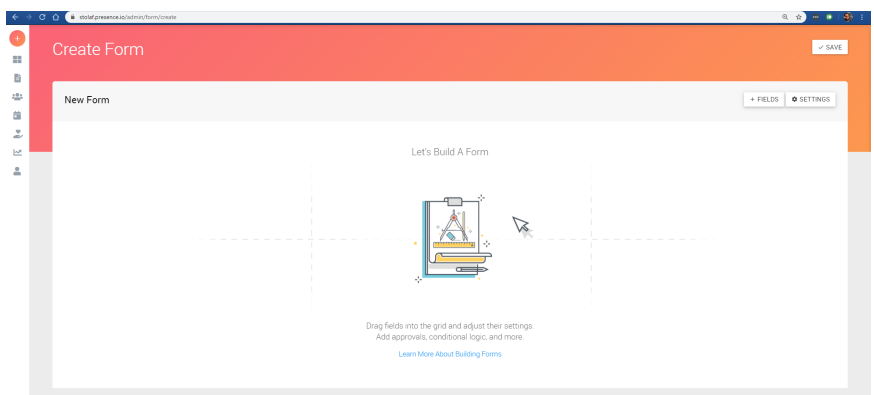
You will now see the Forms Page. To create a new form, click the plus symbol in the top right of your screen.

#### Step 4:

Now you will see the "Create Form" page for your new form. Please refer to the screenshot to the right for reference.

Click on "+ Fields" to add a field (think of this like adding a "question" to your form). Clicking on "Settings" allows you to do things like allow who can take the form and change the name and general description of the form. For now, click on "Settings".

#### Step 5:



Here is the settings menu:

- “Details” allows you to change the name and the description of the form. Name your form something like “[Organization] Elections”
- In “Responses” you can create the message that individuals are sent when they submit the form. This is not required.
- In “Visibility” you can require individuals to log in to fill out the form. For this tab make sure the form is attached to your organization.
- In “Availability” you can set start and end dates on the form and limit responses. Make sure to limit to one response per user.
- “Access” allows you to set who can edit the form. This is not necessary and uses conditional logic, if you’d like to set up something in this tab please reach out to [osa@stolaf.edu](mailto:osa@stolaf.edu).
- “Approvals & Notifications” also sets up some conditional logic and isn’t necessary for election forms.

## Step 6:

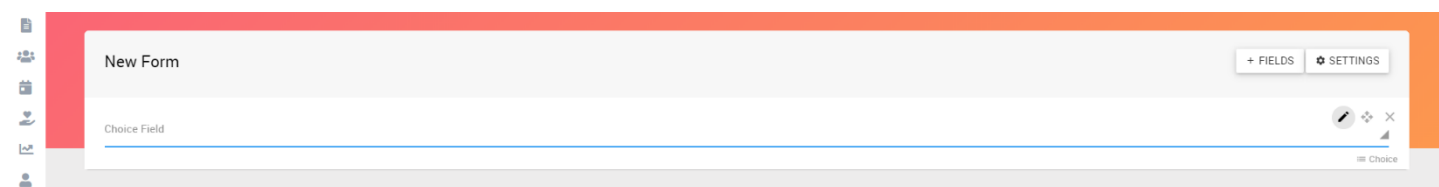
Once you have the settings set to what you’d like, click the left carrot (<) next to the word “Form Builder” on the top of the menu. Then click “+ fields” to begin adding content to your form.

- The “Basic” options of “Text”, “Number”, and “Choice” allow for inputs of either text or numbers or you can make a choice through a drop-down menu or radio button. You will most likely use “Choice” for your elections form.
- The “Advanced” section allows for adding categories represented by each button. These will not be needed for election forms but could be used to poll group members on preferred date and times for meetings.
- “Layout” allows for editing how the form looks with sections, images, groups of questions, and similar settings. They are not necessary for a basic election form, but could be utilized to add photos of candidates if desired.
- “Widgets” will not be needed for election forms and are for building more advanced forms that request inputs on selecting and organization or a certain event somebody has made.

## Step 7:

To build a basic election form, click on “Choice” and drag it onto the form. It may take a moment while the form builds. Once it is set you should see your form look like this:

Click on the words “Choice Field” and then the edit pencil that shows up on the right side of the line:



You should then see this menu:

A screenshot of the 'Field Settings' menu. It has a left sidebar with a back arrow and the text 'Field Settings'. The main area is divided into three sections: 'Details', 'Choice Settings', and 'Conditionals'. The 'Details' section is active and shows fields for 'Field Name', 'Field Description', and 'Field Size'. Under 'Field Size', there are four buttons: 'X-SMALL', 'SMALL', 'MEDIUM', and 'LARGE', with 'LARGE' being selected. There is also a checkbox for 'Required'. The 'Choice Settings' section shows 'Display As' set to 'Dropdown' and a checkbox for 'Allow Multiple Choices'. Below this is an 'Options' section with an 'ADD' button. The 'Conditionals' section is currently collapsed.

- The “Field Name” is what text you’d like to appear on the part of the question that an individual clicks on to answer the question (in the example below it’s the section that says “Presidential Vote”)
- “Field Description” is easiest to think of as what is the question you’d like to ask (in the example below it’s the section that says “Who is your vote for President?”)
- Click the box next to “Required” if you want to make any questions on your form required
- In “Choice Settings” the “Display As” option allows for:
  - Dropdown, which is a dropdown menu of options.
  - List Options, which creates buttons to be clicked on.
  - Checkbox, which makes radio buttons or check boxes, depending on if you have “Allow Multiple Choices” box checked.
- To add the options for these types of displays click the “ADD” button next to options where you will be prompted to add in separate options.
- The “Conditionals” tab is for building a more complex form. If you think that your organization could benefit from such a form, please reach out at [osa@stolaf.edu](mailto:osa@stolaf.edu).

When you’ve finalized the question, click the left carrot (<) next to “Field Settings” to return to your form. If you’d like to add another question for multiple positions, follow the directions again after clicking “+ Fields”. Remember to save your form often by clicking the “Save” button in the top right of the screen (note: your content will briefly disappear and come back when you click “Save”).

### Step 8:

After clicking “Save” you’ll have the option to click a downward-facing arrow next to “Save” and click “View Form”. You will then be taken to a version of your form.

### Step 9:

Once you’ve built your form and previewed it in Step 8, navigate back to the main Forms page by going to [stolaf.presence.io/admin](http://stolaf.presence.io/admin) and then navigating over the menu on the left and clicking “Forms”. You will see the form you just created. Click the three dots on the right side of that form’s row and click “View Responses” to bring up the screen in the screenshot on the next page:

The screenshot displays the 'New Form' dashboard. At the top, four summary cards show: 1 Response, 2 Views, creation time of 03/30/2020 - 3:45 PM, and an Active status. Below these, the 'Responses' section includes a search bar and a table with one entry from 'Person A'. To the right, the 'SHARE' section provides a 'Portal Link' to the form.

Response Title	Status	Completion Time
Person A	Submitted	03/30/2020 - 3:57 PM

Portal Link: <https://stolaf.presence.io/form/new-form-2>

The “Portal Link” is the link you will send out to your organization members. By clicking “Summary” you can see a graph of the responses to each question that you posed. If you would like to edit your form further you can click the pencil icon in the top right of the screen.

If you have any questions about this process, please don’t hesitate to reach out to the Office of Student Activities for help!