

WILLIAM & MARY TribeLink

How To Create and Manage Organization Elections

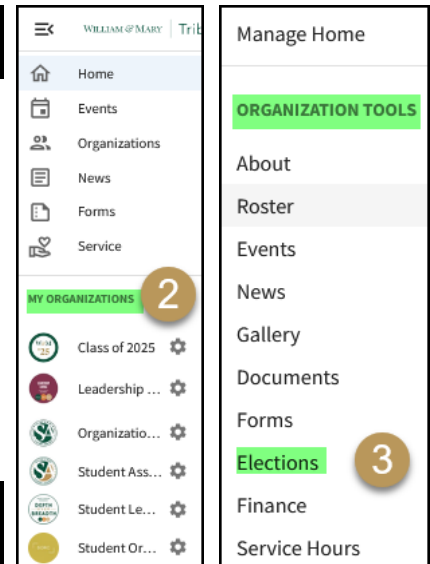
Organization Elections Made Easy! TribeLink allows organizations to hold online elections for their members. Members must log-in using their W&M credentials and will only be able to vote once in the election. Organization leaders can customize the election/ballot by adding pictures of candidates, including additional information, etc. TribeLink will also count the votes and produce a report of results for the organization leadership. This guide will walk organization leaders through the steps to set up and manage organization elections.

General Information to Access the Election Management Function

To create/manage elections, you will first need to access the organization's Election Management page within TribeLink. Here are some instructions to get to that page, instructions for the specific functions can be found throughout this resource.

- 1) Log into TribeLink (tribelink.wm.edu)
- 2) Click on the gear icon next to your organization name in the left hand menu on your screen under "My Organizations"; this will open a menu of organization tools. If you have not expanded the left hand menu, simply click on the organization profile picture and this will open the menu of organization tools.
- 3) Select "Finance"

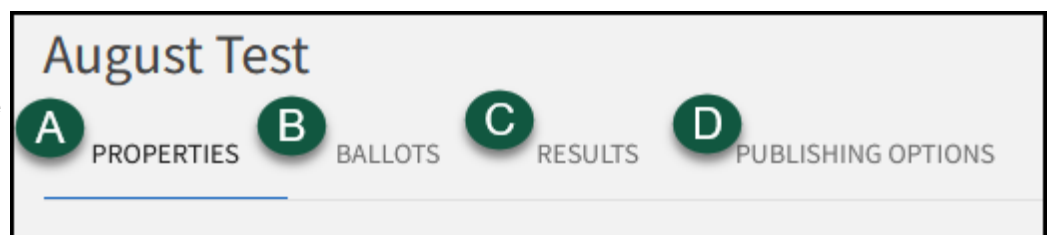
Once you are on the Elections page, you can manage exiting elections or create new elections. To create a new election, click on the blue "+Create Election" button.



Define the Properties of the Election

- Start by naming your election; be descriptive so it's easy to find this in the future.
- You can include instructions for the election that will be displayed at the beginning of the election.
- You will establish the timeframe in which people can access the election/ballots for this particular election.
 - Note: this only restricts when a user can access/start the ballot; it does not restrict when a user can submit. Submissions can be received after the end date/time as long as the ballot was started before the deadline. We recommend stating that ballots submitted after the deadline will not be counted/included and downloading the results at the end time.
- You can also determine if only members on the roster can vote in the election, or if it is an open election. This is also where you make the election "active" or "inactive" once you have finished building the election. ***Important Tip: **Make sure your roster is up to date**, so that when you select "Only Allow Users on the Roster of this Organization to Vote," the correct people actually have access to your election.***

After you have initially defined the properties of the election (A), you will be able to build (B) and manage (C and D) the election using additional features.



Additional Questions?

Email tribelink@wm.edu or check out some online resources at the Engage Help Center:

- [How to Create and Election \(video\)](#)
- [Creating an Organization Election](#)
- [Adding Images to Election Choices](#)
- [Viewing Election Results](#)

Create Ballots for the Election (B)

Within any election you can have multiple ballots; ballots are where you actually input the options/candidates that individuals will vote for. *This is just like building any other form in TribeLink, except there are fewer options for question types. You will need to set "Form Properties" and can create multiple pages within the form.*

Before you can enter in the options to vote on, you must determine Access Restrictions.

- General Access - Enabled: all users (as identified in the Election Properties) will be able to complete this ballot.
- General Access - Disabled: you can allow or deny access to the ballot to specified lists of users. In order to do this, you must work with the Office of Student Leadership Development to create "eligibility lists." Eligibility Lists are subsets of the membership that should have access to a specific ballot, but not another ballot; for example - only sophomores are allowed to vote for the sophomore class representative. You must plan in advance and request this additional level of support at least 10 business days in advance.

Next you will build the Ballot form; this is where you will include the "questions" and "answers" for the form.; for more information on creating forms, refer to the Creating and Managing Forms guide.

These are the question types that are available to build you ballot form:

- Check Box List - voters may select several options from the multiple options available. You can determine minimum and maximum number of choices a voter selects
- Radio Button List - voters may select only one option
- Text Field - voters may generate their response
- Instructions - a descriptive box where additional information/instructions about the ballot can be included
- Ranking - voters may prioritize multiple options, from the options available. You can determine the maximum number voters can rank

For each question you can set Properties:

- You can require that voters answer this question
- You can shuffle answers, so the order of answers/options changes between voters

You can also add additional information to the answers/options:

- Additional text - includes an icon, when clicked additional text/information is displayed in a pop-up
- Tool Tip - information that appears when hovering over the
- You can add a picture either in the "text" of the answer or in the "additional text." The photo must be hosted somewhere and have an image URL, we recommend hosting those photos in your organization's Photo Gallery in TribeLink.
- You can also list a Write-In option where appropriate.

Next create any additional Ballots you may need for this election; there can be multiple ballots within an election. You can create additional ballots and assign them to other subsets within your organization using "Eligibility Lists."

Finally, set your election to "Active" so that users can begin to vote. Make sure you are in the window of availability for the election AND the "Active" button is on.

View Election Results (C)

After the conclusion of the election, you can view the results. You can view election results in two different ways:

- Total number of votes cast - this will show you the percentage of votes received by candidate, relative to all votes cast.
 - Total number of voters - this will show you the percentage of votes received by candidates, and includes any abstentions
- You can also export a file of all votes cast in the election, but you will not be able to connect those votes to the voter who cast them. You will also be able to export ballot specific votes. To access your exported files, you will go to "Downloads" in your User Drawer (under your profile picture).

***Note: if you are using Ranked Choice Voting, this will not calculate the results for you; it will only provide you with the raw data.

Publishing Options (D)

This is where you can activate a header on the homepage of your organization when the election is active and voting is open, so that members of your organization know they can vote. There will be a button they can click on that header, that will take them to the election itself.

You can also send a URL to members to encourage them to vote; you MUST use the link on the Publishing Options page, not copied and pasted from your browser.