

# V<sup>OTER</sup> SCIENCE

Understanding the Voter Domain for Right-of-Center Politics



# Canvasser User-Guide

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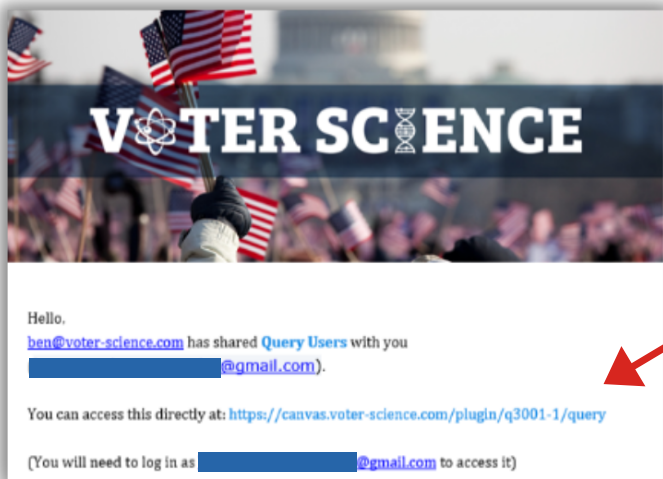
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## Onboarding

After you decide to use canvasser as your canvassing tool, you will receive a link from Voter Science giving you direct access to the query portal:



Use this link in the email you receive to access your querying portal

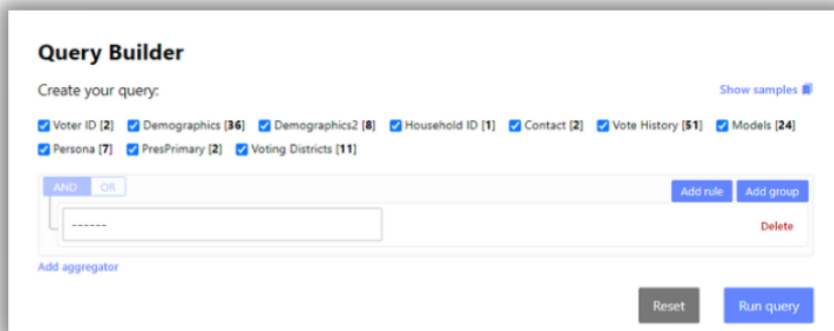
Clicking that link will bring you to your querying portal. If you have never logged into Voter Science on your current device, you may be prompted to login before you are able to access your querying portal.

To login, you must enter the email where you received the query link.

A PIN will then be sent to your email. Enter the PIN you receive on this page.

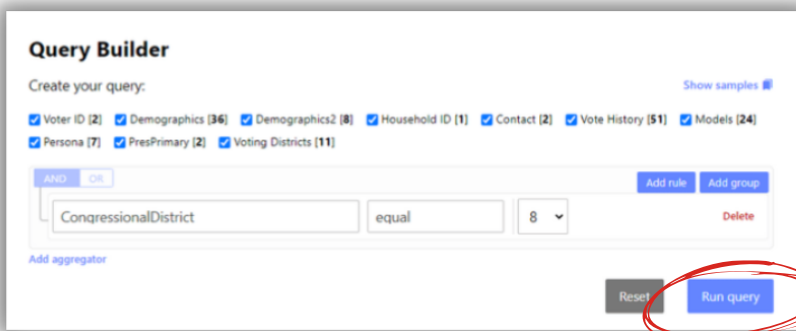
## Querying

Once you have opened the link you received and logged in, you will be brought to canvasser's querying portal:



The screenshot shows the 'Query Builder' interface. At the top, it says 'Create your query:' with a 'Show samples' link. Below this is a list of variables with checkboxes and counts: Voter ID (2), Demographics (36), Demographics2 (8), Household ID (1), Contact (2), Vote History (51), Models (24), Persona (7), PresPrimary (2), and Voting Districts (11). Below the list is a query rule editor with 'AND' and 'OR' buttons, an 'Add rule' button, and an 'Add group' button. The rule editor contains a single empty box with a 'Delete' button. At the bottom, there are 'Reset' and 'Run query' buttons.

It is from this page that you can begin looking at your data set and exploring using a number of different variables. To begin, select the first box and choose a variable to apply to your data set.



The screenshot shows the 'Query Builder' interface with a query rule defined. The rule editor contains a box with 'CongressionalDistrict', an 'equal' operator, and a dropdown menu with '8' selected. There are 'Add rule' and 'Add group' buttons. At the bottom, there are 'Reset' and 'Run query' buttons. The 'Run query' button is circled in red.

In this example, we have chosen to look at Congressional District 8. Hit the "Run query" button to view the count of this query. After a few seconds, your count will be displayed below the querying portal:



The screenshot shows the query result. It displays '498095 rows:' followed by the query '((CongressionalDistrict == 8))' and a 'Remove' button.

This query has resulted in 498,095 rows. This means that there are 498,095 registered voters in Congressional District 8

## Querying

You can also add multiple variables to find even more information. You do this by hitting the "add rule" button on the query builder

The screenshot shows the 'Query Builder' interface. At the top, it says 'Create your query:' with a 'Show samples' link. Below this are several checked categories: Voter ID (2), Demographics (36), Demographics2 (8), Household ID (1), Contact (2), Vote History (51), Models (24), Persona (7), PresPrimary (2), and Voting Districts (11). The main area contains a single rule: 'CongressionalDistrict' with the operator 'equal' and the value '8'. To the right of this rule are two buttons: 'Add rule' (circled in red) and 'Add group'. A 'Delete' button is also present. At the bottom left, there is an 'Add aggregator' link.

After adding another rule, select the variable you would like to apply to the data set. In the example below, we are looking for all voters in Congressional District 8 who are 40 years or older.

The screenshot shows the 'Query Builder' interface with two rules. The first rule is 'CongressionalDistrict' with the operator 'equal' and the value '8'. The second rule is 'Age' with the operator 'greater or eq...' and the value '40'. A red arrow points to the 'greater or eq...' operator. To the right of the rules are 'Add rule' and 'Add group' buttons. Below the rules are 'Delete' buttons for each. At the bottom, there are 'Reset' and 'Run query' buttons. The 'Add aggregator' link is also visible at the bottom left.

Note that to run this query, you must change the dropdown to the right of your variable. In some cases, such as "Age," this is especially necessary.

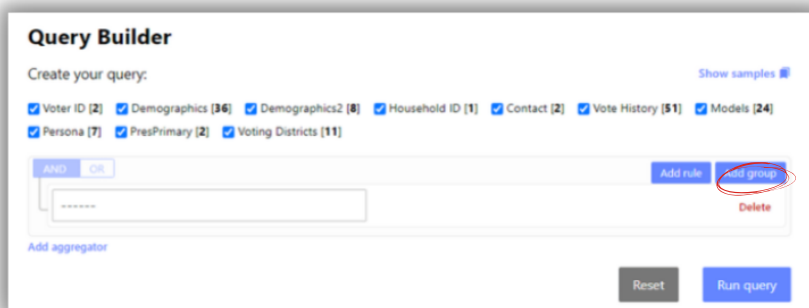
In the example above we have it set to "Age" is "greater or equal to" "40."

## Querying

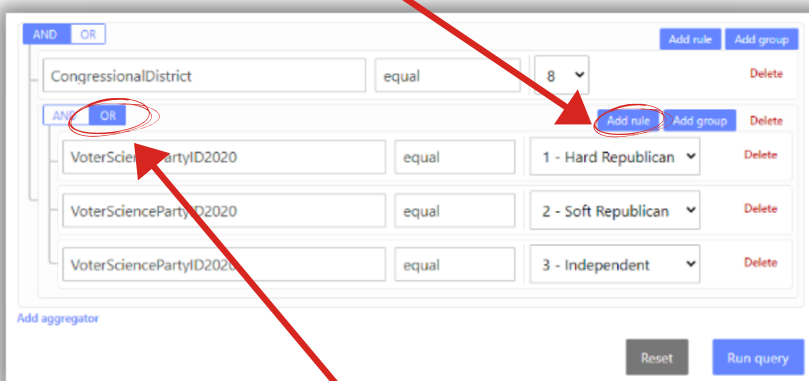
Using Canvasser, you can also group your variables. This is necessary when you want more than one variable that someone can only have one of, like PARTY ID.

You can't look for people that are both a Republican AND Democrat at the same time, but you can look for both Republicans OR Democrats at the same time.

To do this, add a group to your query using the "Add group" button:



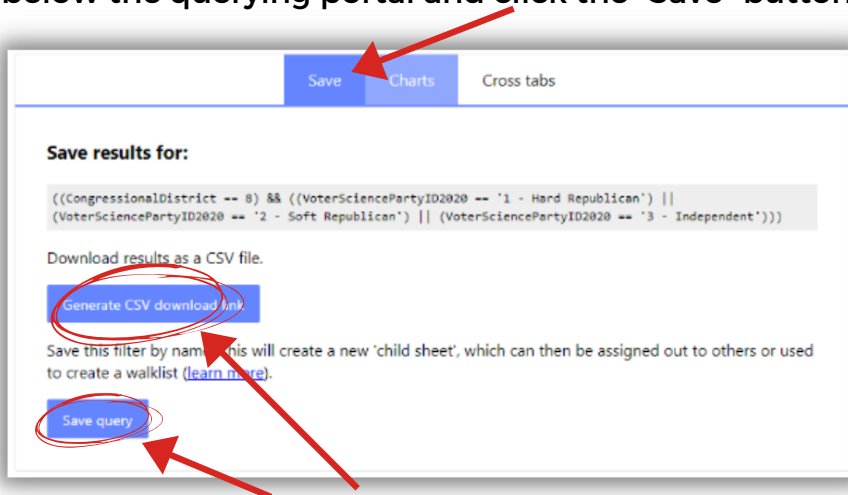
Once you've added a group, add as many rules as you need within that group using the "Add rule" button appearing in the new group



In this example, we have added three Party ID's to this search. In order for this query to go through properly, you must make sure that you have the "OR" expression enabled, because we are searching for Hard Republicans OR Soft Republicans, OR Independents. One person cannot fall within all three of these party IDs, therefore the AND expression should not be used here.

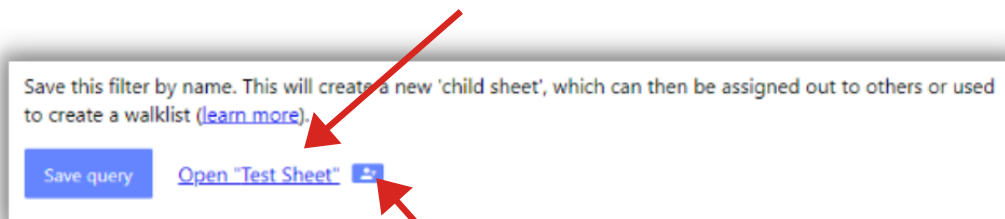
## Querying

When you are satisfied with your query, there are a number of things you can do with it. The first is saving your query for future use. To save a query, scroll just below the querying portal and click the "Save" button.



You can then either download your results to an excel .CSV file, or Save query for future use within the Canvasser tool. After hitting "Save query" you will be prompted to name your query. We recommend naming it something relevant for the sheets intended use, ie. "CD-8 Republicans"

After saving your query, you can access the sheet you've created by going to it immediately after saving by hitting the "Open" link that pops-up:



You can also share the child sheet you just created with the "add" icon to the right of the newly created link. Simply click that link and enter the email of the person you wish to share it with on the page that opens up.

## Querying

You can also go back to it later by accessing your querying link and scrolling down to "Child Sheets." Once you have opened the Child sheets drop down, simply look for the name of the sheet you saved, and click the link. This sheet's name is "Skillman" and the circled text is a link that will open up this query sheet.



Once you have accessed the query you've already created, called a Child Sheet, you can either export it to a walking list, or continue adding sub-queries.

Sub-queries continue to refine your initial query. In the example below, we have a parent child sheet that has multiple sub-queries / child sheets attached to it.

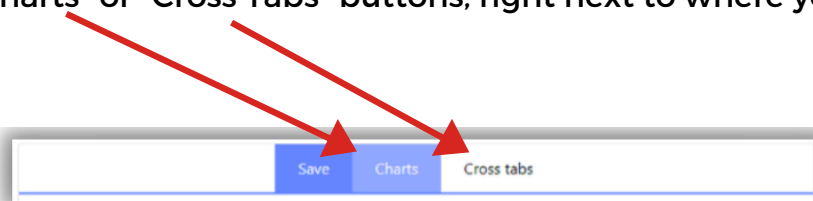


Sub-queries can be useful if you want to share access to a sheet with multiple people, without having them mess with your sheets (further information on sharing on page XX). They are also useful if you want to target a large group, but want to target certain groups first, i.e. you have a statewide list of Republicans queried, but want to target people within that group that meet certain criteria like those who are located in a certain county, or city, as in the example above.



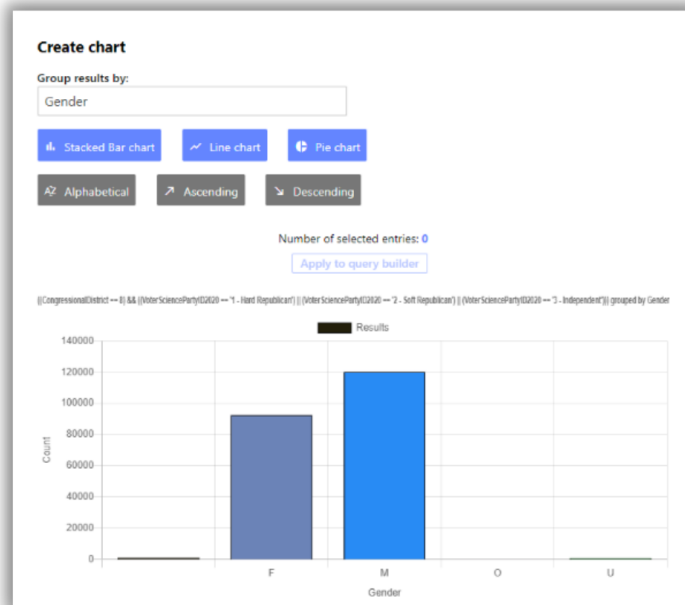
## Visualizing

The second way you can utilize your query is through visualization. This is done through the "Charts" or "Cross Tabs" buttons, right next to where you can save your query.



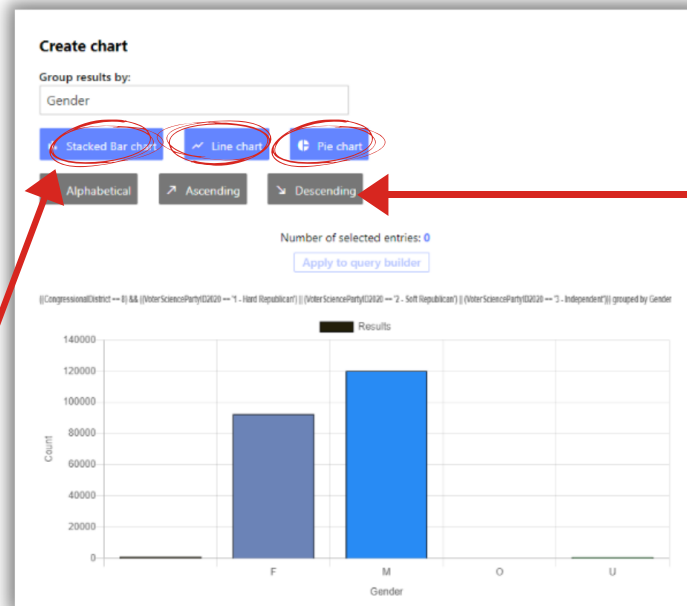
### Charts

Click the "Charts" button above. Once you are on the charts tab, you can group your results in a variety of ways. Use the drop box and select a variable to visualize your data through. In the example below, we are visualizing Hard and Soft Republicans, as well as Independents by their gender.



You can then use your mouse to hover over the bars and see the exact number of Females, Males, and those who are unidentified.

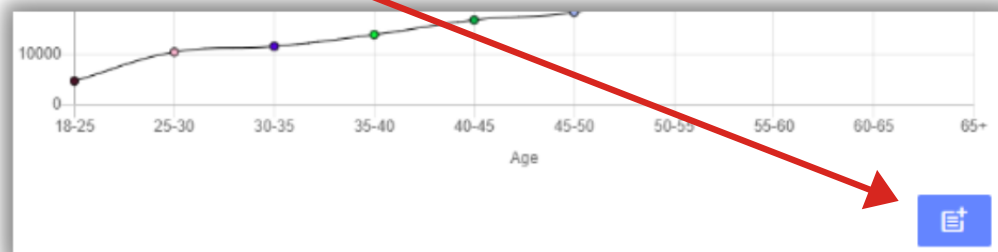
## Visualizing



Different ways of organizing your data. Alphabetical, largest to smallest, or smallest to largest.

Depending on the variable you selected, it may be better to visualize your data through a stacked bar, line or pie chart. You can change the way your data is presented by selecting one of those options. The buttons just below the different styles of charts are different ways of organizing your data on the chart you choose. Simply click an option and your chart will update with the selected organization method.

You can then share your charts with others through the blue icon below the chart and to the right.



## Visualizing

### Cross Tabs

The last way you can visualize your data is through Cross Tabs. Cross Tabs allow you to visualize to variables at once. In the example below, we decided to view our query through the lens of age and gender. The table shows the counts of our query within different age groups, and further breaks down each age group by gender.

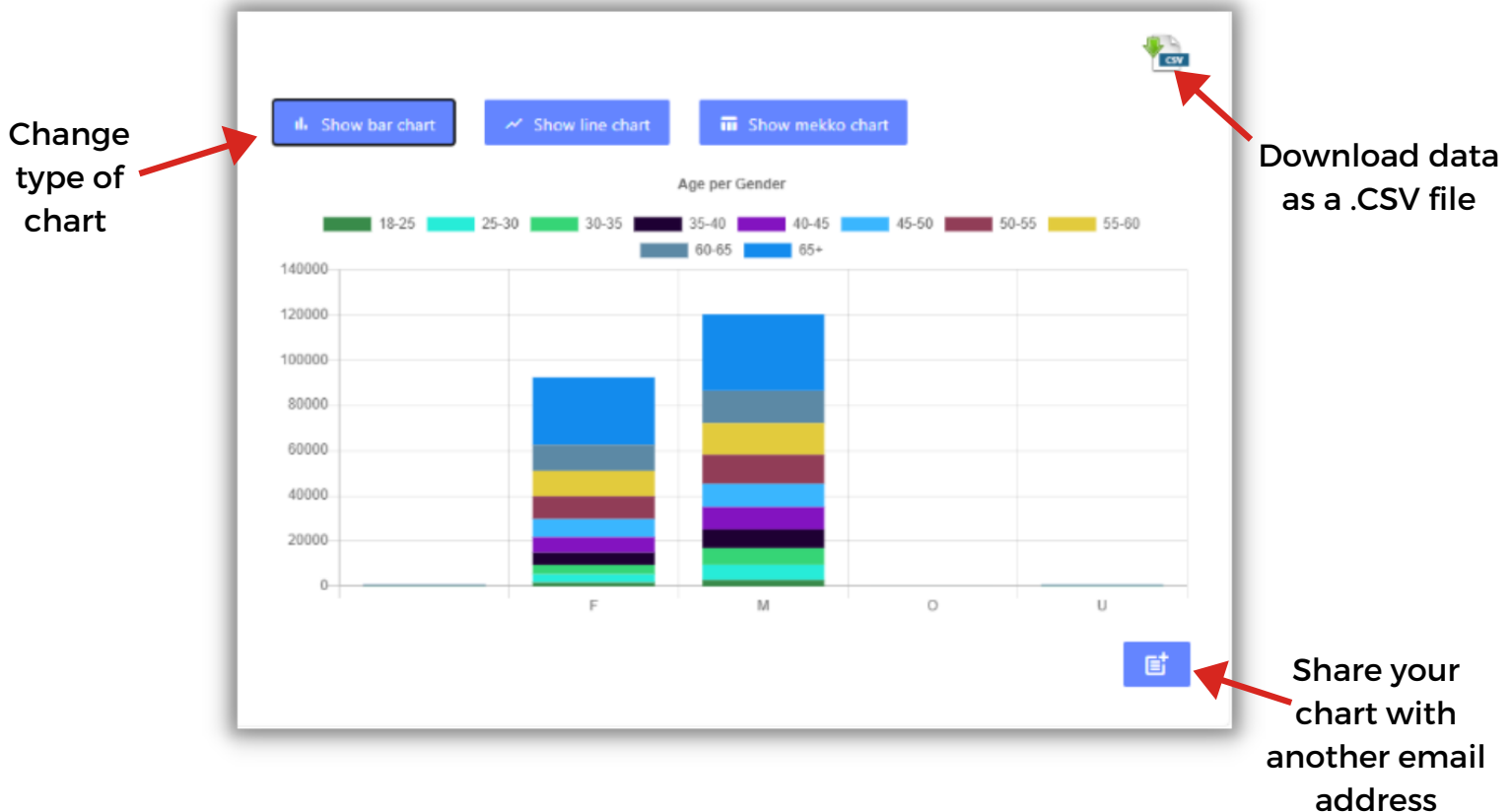
The screenshot shows the 'Cross tabs' interface in the Canvasser application. It includes a 'Generate cross tabs' section with 'Rows' set to 'Age' and 'Columns' set to 'Gender'. A 'Show cross tabs' button is visible. Below the interface is a table with 11 rows and 7 columns. The columns are labeled 'Age', 'F', 'M', 'O', 'U', and 'Total'. The rows represent age groups from 18-25 to 65+, plus a 'Totals' row. Red arrows point to the 'Age' input field (labeled 'Variable 1'), the 'Gender' input field (labeled 'Variable 2'), and the 'Show cross tabs' button (labeled 'Show results').

Age	F	M	O	U	Total	
18-25	46	1739	2858	1	37	4681
25-30	87	3633	6637	1	96	10454
30-35	88	4072	7381	3	63	11607
35-40	79	5422	8383	1	57	13942
40-45	93	6919	9783	2	66	16863
45-50	80	7919	10365	0	68	18432
50-55	92	10128	12798	0	62	23080
55-60	85	11307	13864	1	94	25351
60-65	99	11410	14418	0	83	26010
65+	149	29797	33705	1	179	63831
Totals	898	92346	120192	10	805	214251

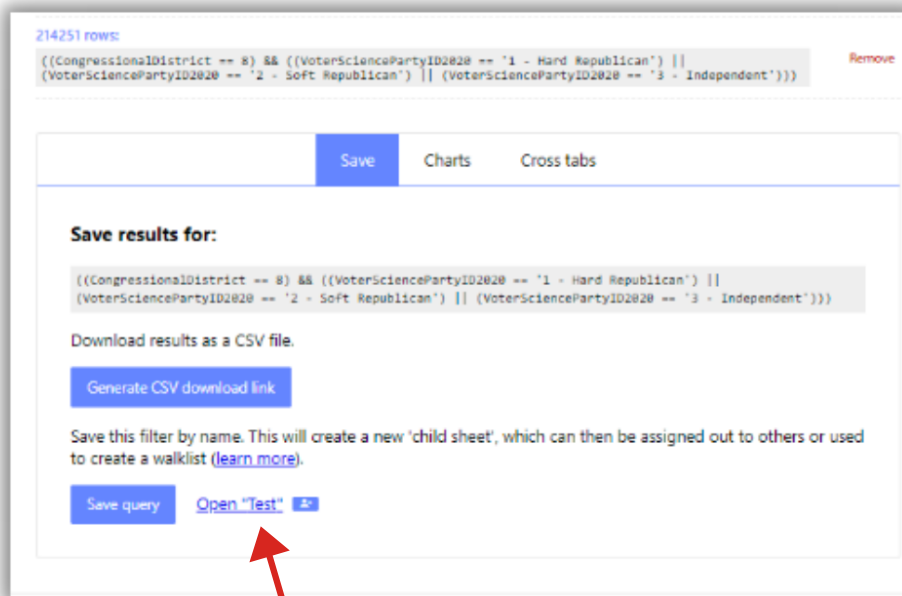
### Visualizing

After creating a Cross Tabs table, you can scroll to the bottom of the page and (1) download the data into a CSV file or (2) visualize the two variable applied to your data through charts.

In this example, using a bar chart provides the best visualization of our data, but depending on the variables you use, you may want to use line or mekko charts.

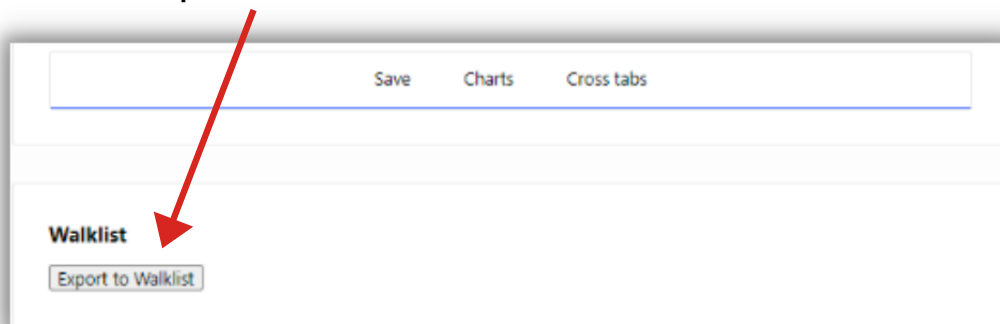


## Walklists



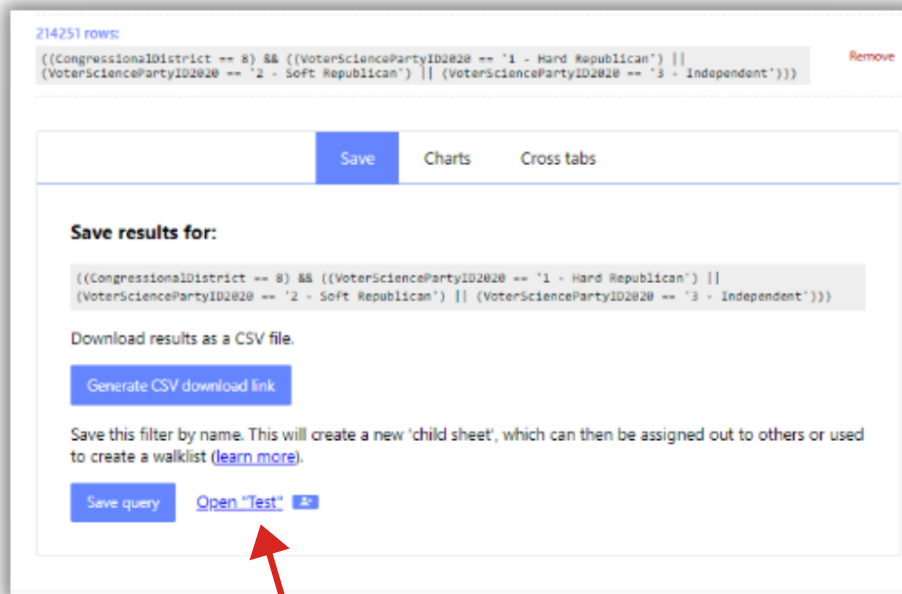
Once you have created a query that you would like to export to a walking list, open your newly created child sheet.

Clicking the newly created sheet will open a new querying portal. From this new page, click the "Export to Walklist" button.



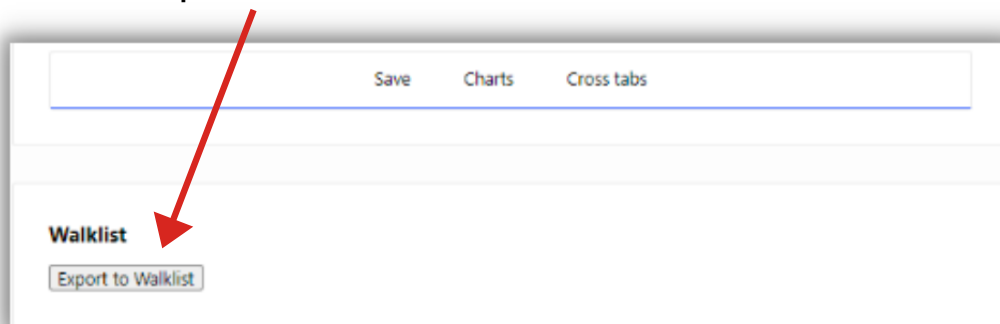
This may take a few minutes to complete. Once it has completed the creation of your walklist, a new button will pop up right where the "Export to Walklist" button was. It will say "Go to Walklist." Click this link to then be taken to your walking list.

## Walklists



Once you have created a query that you would like to export to a walking list, open your newly created child sheet.

Clicking the newly created sheet will open a new querying portal. From this new page, click the "Export to Walklist" button.

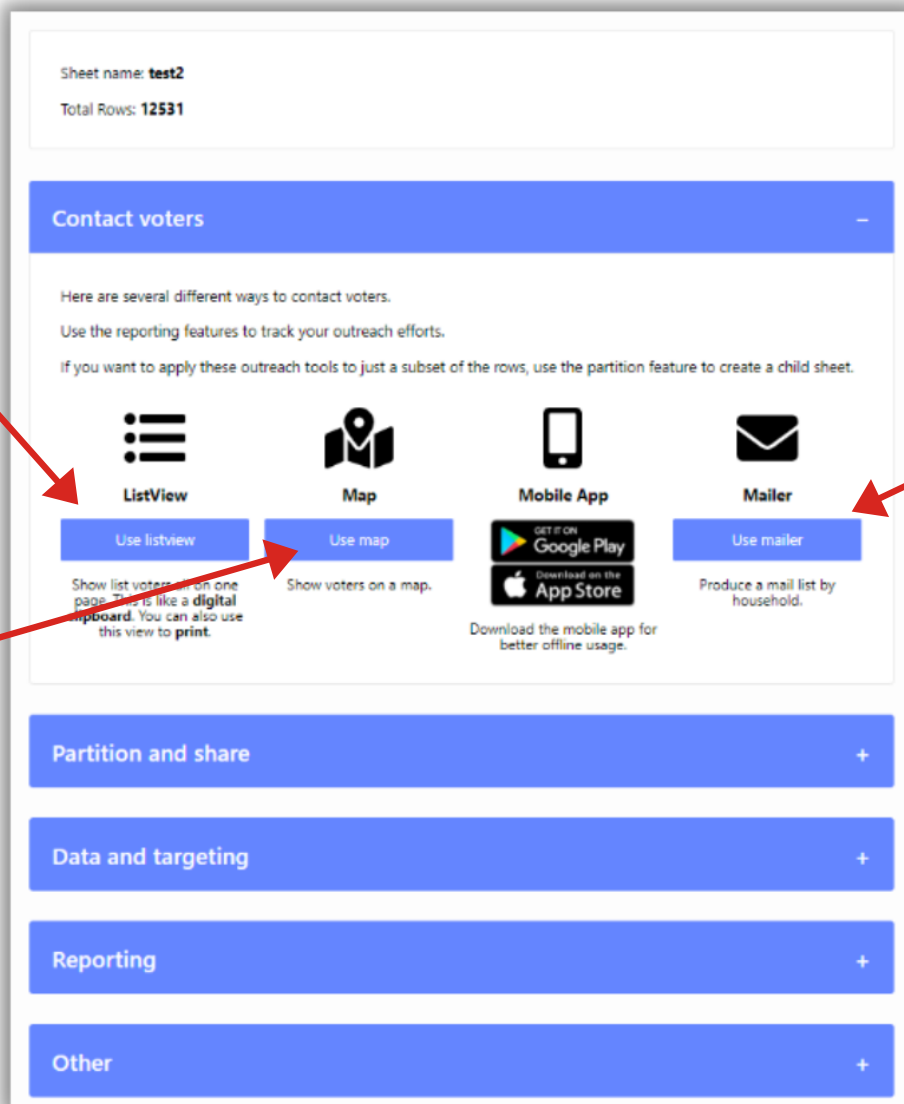


This may take a few minutes to complete. Once it has completed the creation of your walklist, a new button will pop up right where the "Export to Walklist" button was. It will say "Go to Walklist." Click this link to then be taken to your walking list.

## Walklists

This is the home screen for your walk list. There are a number of different things you can do from this page. The majority of your work will solely use the first two tabs - "Contact Voters" and "Partition and Share"

Each of these options is called a Plugin. In the "Contact Voters" tab there are three plugins:



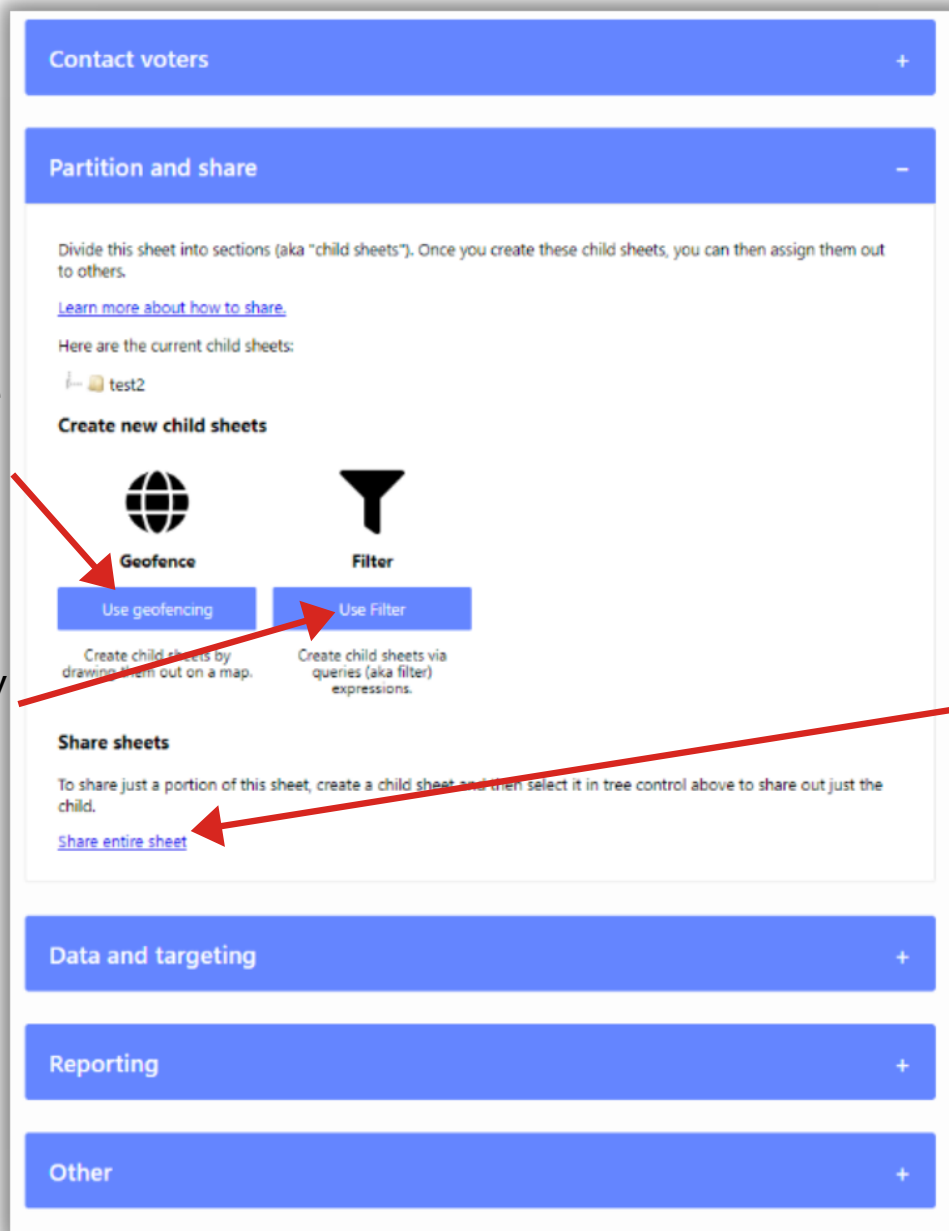
**ListView:**  
View voters within your list via list view

**Map:**  
View voters within your list on a map

**Use Mailer:**  
Download a mail-merge ready .CSV file for mailing

## Walklists

In the "Partition and Share" tab there are three plugins: Geofencing, Filtering, and sharing the full sheet



**Geofencing:**  
Manually divide your walk list into walkable areas

**Filter:**  
Continue to query and create child sheets from this data set

Share the entire sheet with another email



## Walklists

In the "Data and Targeting" tab there are three plugins: Filter, Search, and Data Uploader.



### Filter:

Continue to query and create child sheets from this data set

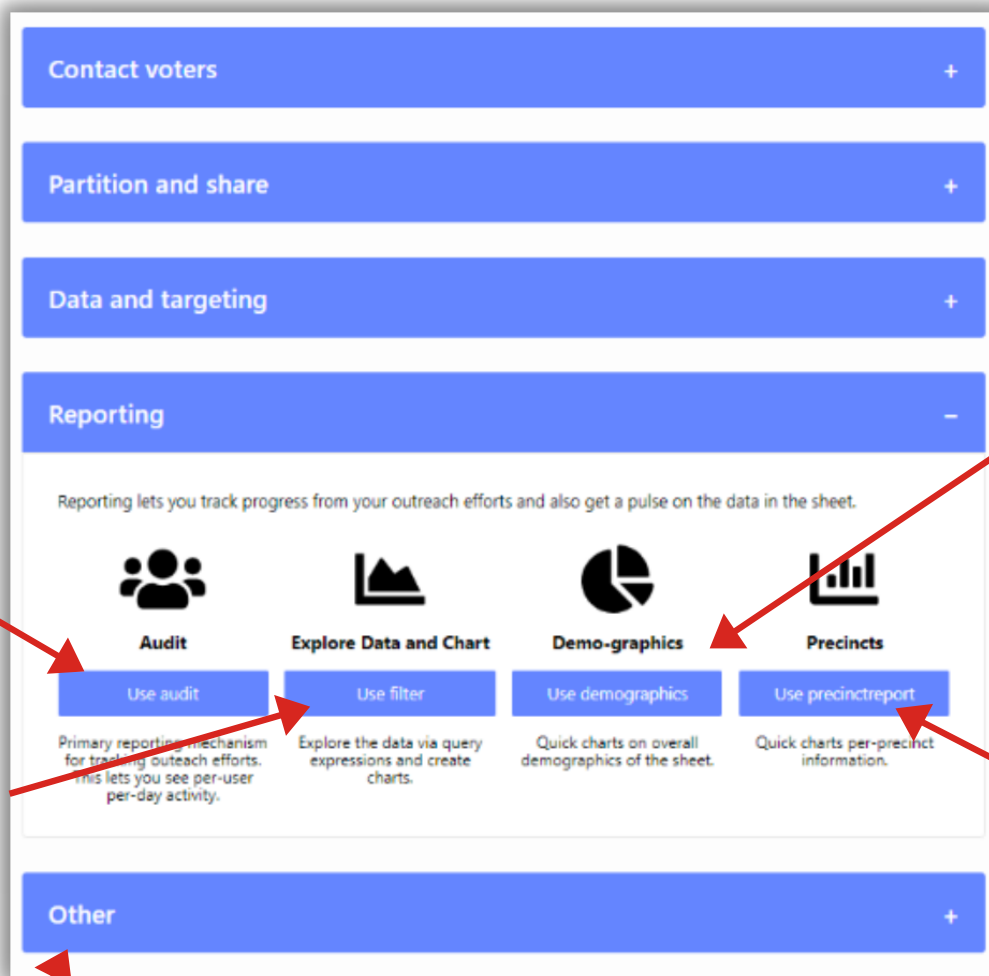
### Search:

Search for individual names within the sheet

Data Uploader:  
Upload your own columns to the data set

## Walklists

In the "Reporting" tab there are four options: Audit, Filter, Demographics, and Precinct Report.



**Audit:**  
Audit the results of your work to find information like voters marked as supporters, etc.

**Demographics:**  
Create quick charts to explore the demographics of your sheet

**Filter:**  
Continue to query and create charts from the data set

**Precinct Report:**  
Create quick charts to explore information on a precinct level

The "Other" tab contains a link for you to view a list of all available plugins.

## Walklists

### List View

Under the Contact Voters tab, select ListView. This will bring you to a screen similar to the image below:

These sheets are automatically created for each: PrecinctName

Name	Shared with	Number Voters	Latest Version	Last modified	Operations
SAM 05-2718 [Walking List] [View Map]	Share this...	158	1	1 hour ago	
SAM 05-2941 [Walking List] [View Map]	Share this...	157	1	1 hour ago	
SAM 05-2971 [Walking List] [View Map]	Share this...	90	1	1 hour ago	
SAM 05-2972 [Walking List] [View Map]	Share this...	284	1	1 hour ago	
SAM 05-2975 [Walking List] [View Map]	Share this...	188	1	1 hour ago	
SAM 05-3202 [Walking List] [View Map]	Share this...	68	1	1 hour ago	
SAM 05-3203 [Walking List] [View Map]	Share this...	123	1	1 hour ago	
SAM 05-3204 [Walking List] [View Map]	Share this...	204	1	1 hour ago	
SAM 05-3306 [Walking List] [View Map]	Share this...	144	1	1 hour ago	
SAM 05-3307 [Walking List] [View Map]	Share this...	67	1	1 hour ago	
SAM 05-3308 [Walking List] [View Map]	Share this...	87	1	1 hour ago	

From here, you can easily view each precinct and its details. Hitting [Walking List] will bring you to a list of that precinct's voters, organized by street name. Hitting [View Map] will show each voter in the selected precinct on a map.

You can easily share individual precincts to volunteers by hitting the "Share This..." button in the middle of the table. Enter their email on the screen and hit share. They will be emailed a link giving them access to that precinct's walking list.

You can share one precinct with multiple people.

### Plugins Index

Activity Feed:

Audit:

Begin:

Blame2:

Changelog:

DataUploader:

Demographics:

Filter:

Geocopy:

Geofencing:

ListView:

Mailer:

Map:

Map.All:

PerUserReport:

Plugins:

Precinctreport:

Print:

QvManage:

Report:

Share:

Turnout:

BasicGridEditor:

BulkVRDBLookup:

Manage:

MyFirstPlugin:

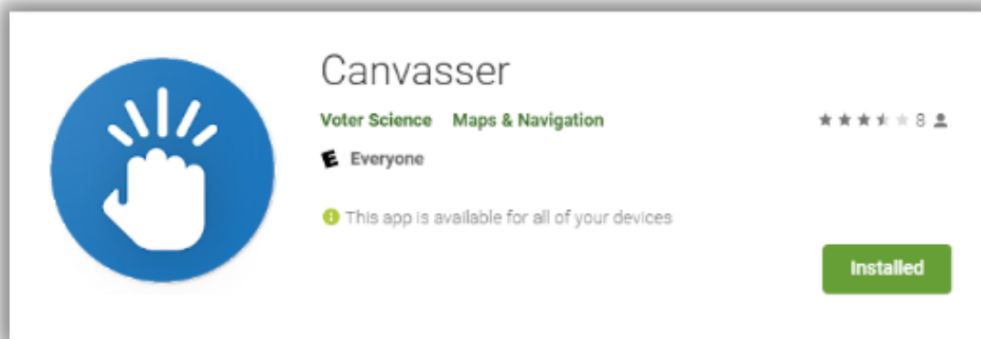
Search:

Walk:

### Volunteers

End-Users who will be using Canvasser sheets to canvas their neighborhoods will receive access from their sheet's manager. After the sheet is shared with their email, they will receive an email with a link granting them access to the area that was shared with them.

Click the link in this email to open your sheet. If you have not signed into Voter-Science on the device you are using, you may be prompted to login. Enter your email and you will receive a PIN. Enter this PIN on the page to login and access your sheet. (see page 3 for more detailed information on logging into Canvasser)

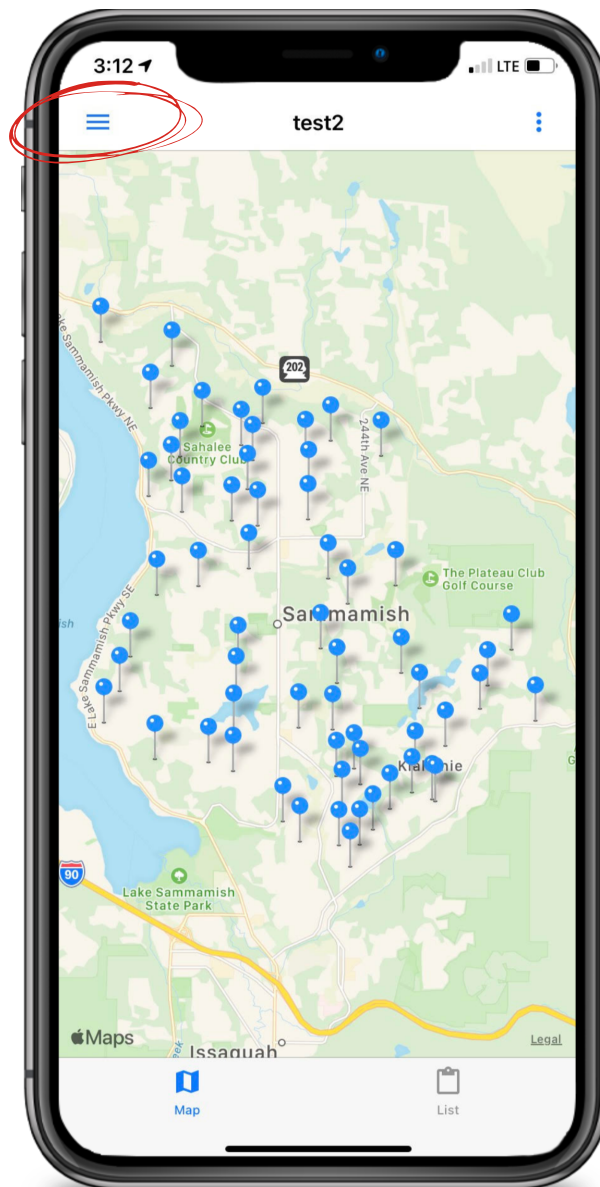


When canvassing your area, you will want to use your phone or other device to track and enter your progress. Download the Canvasser app from the Google Play or Apple App stores to begin. If you have not logged in on your mobile device, you will need to follow a similar process to the above in order to login and get access to the sheets shared with your email.

Once you have logged in, the sheets that have been shared with your email will automatically be loaded into your app.

## Volunteers

Once you have logged in to the Canvasser Application, click the three lines in the upper right corner to show all the sheets that have been shared with you.



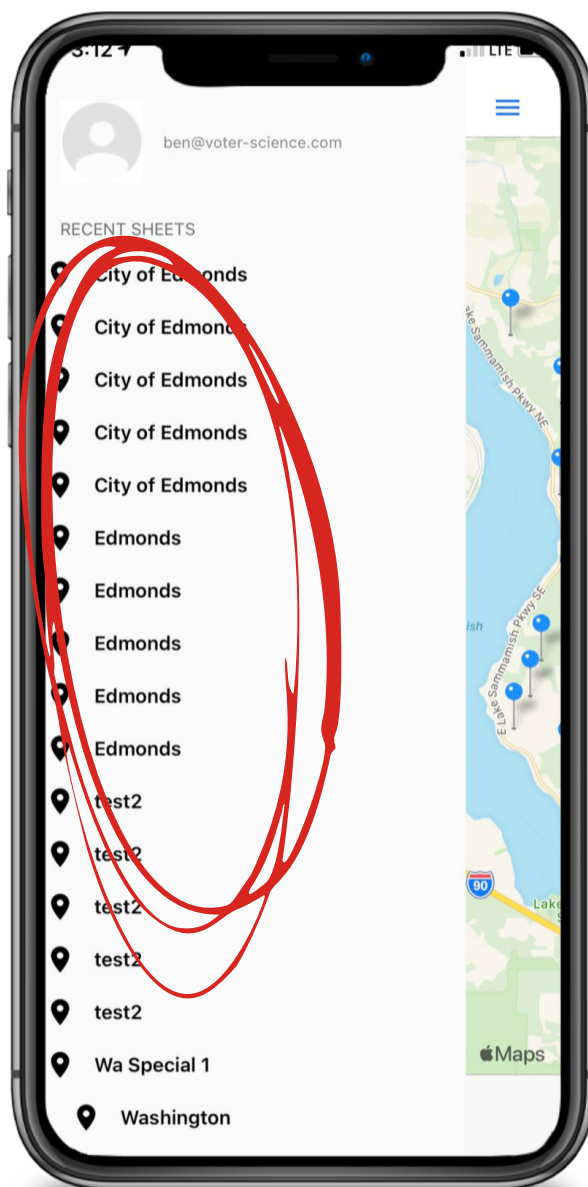
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### Volunteers

This will open a side bar that shows you all the sheets you have access to. Click on the sheet you intend to work off of.



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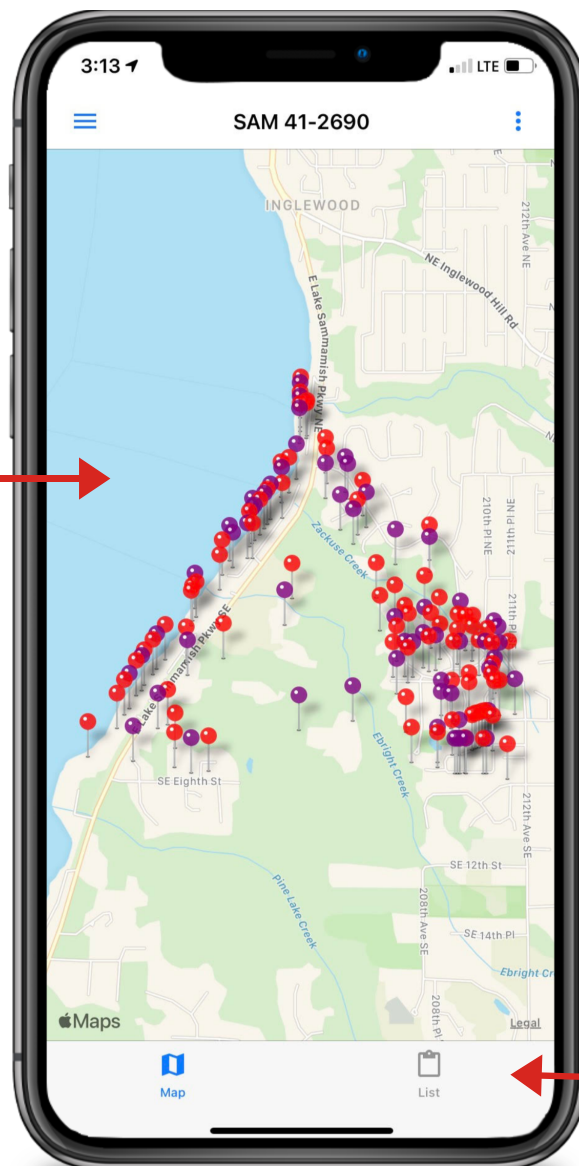
### Volunteers

Once you have opened your sheet, you can view the data in either list or map view. When walking an area, Map view can easily guide you through your walk, and listview can help you view addresses and other information easily.

Blue Pins: Democrat Households

Red Pins: Conservative Households

Purple Pins: Unidentified or mixed households



Easily toggle between the two views



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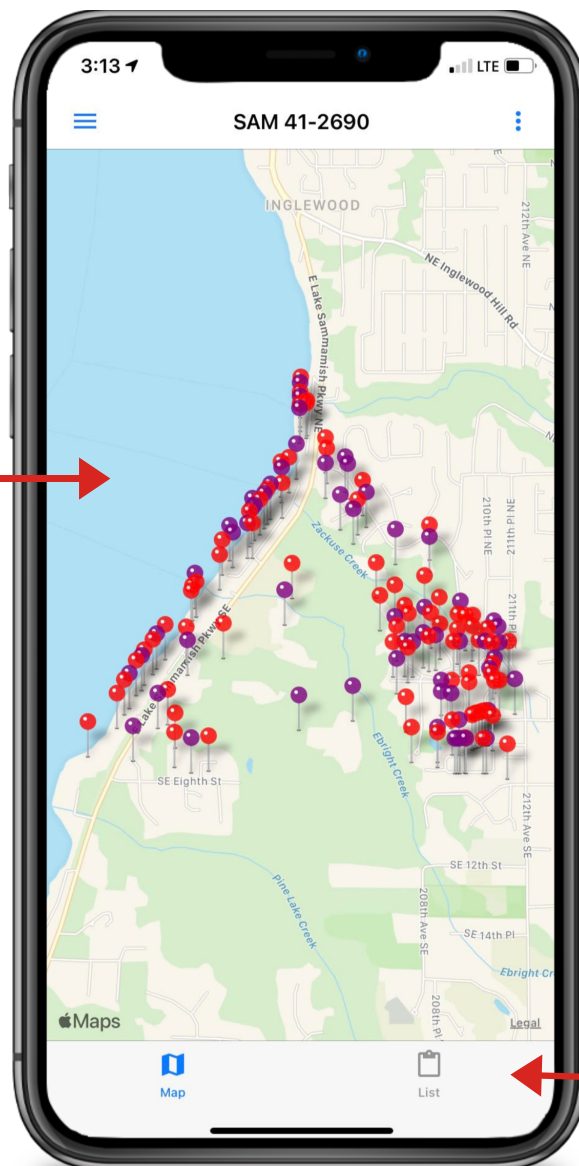
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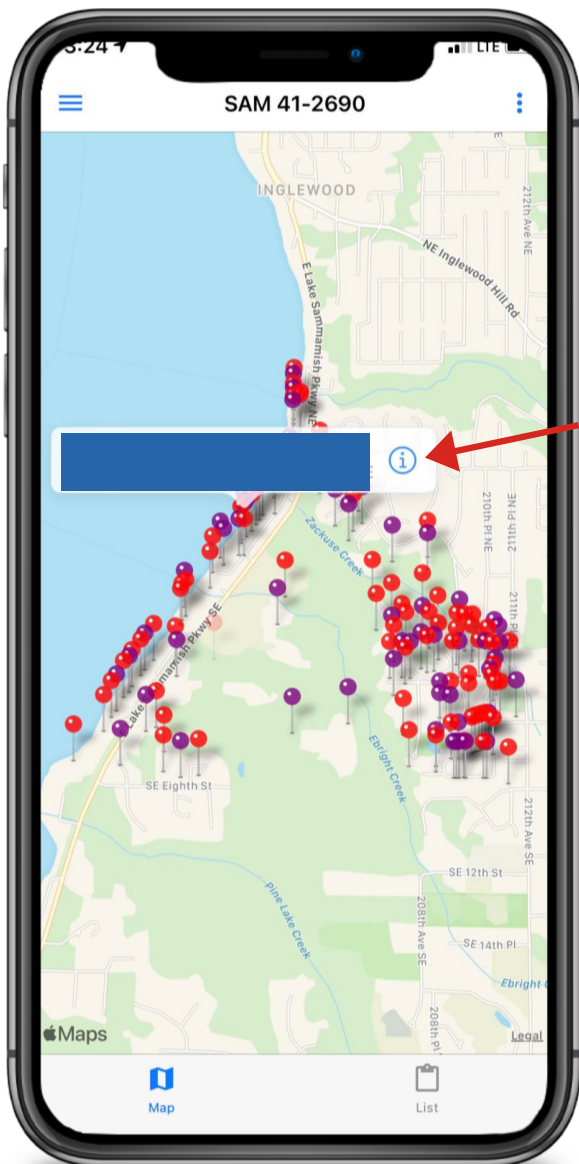
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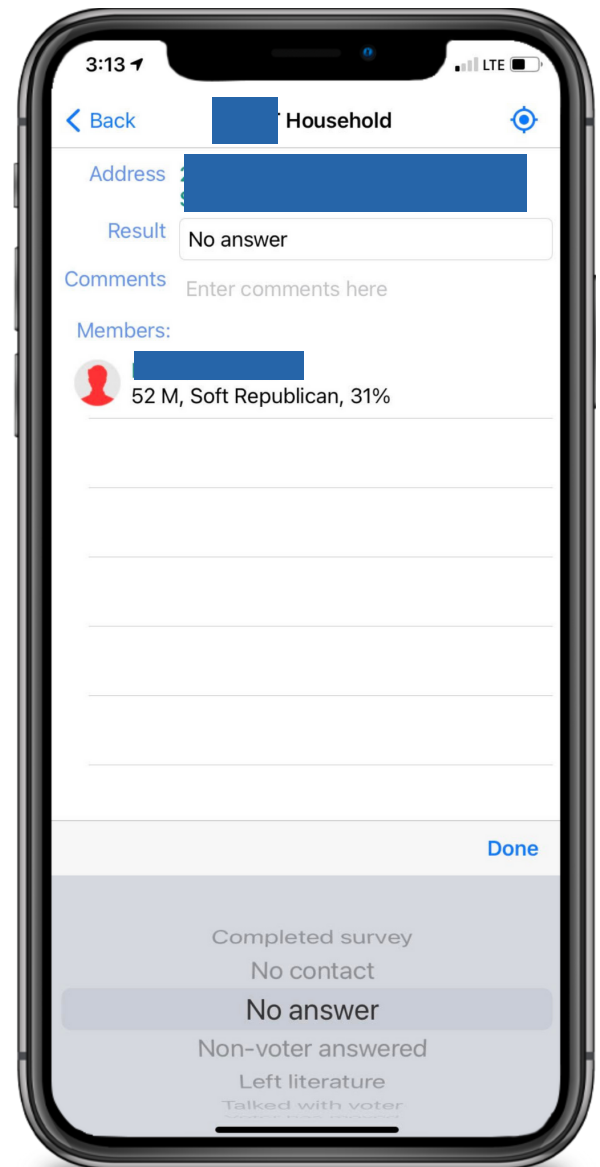
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### Volunteers

To enter information about a household or individual, click their pin in mapview, then hit the (i) icon to view. From listview, click their household.

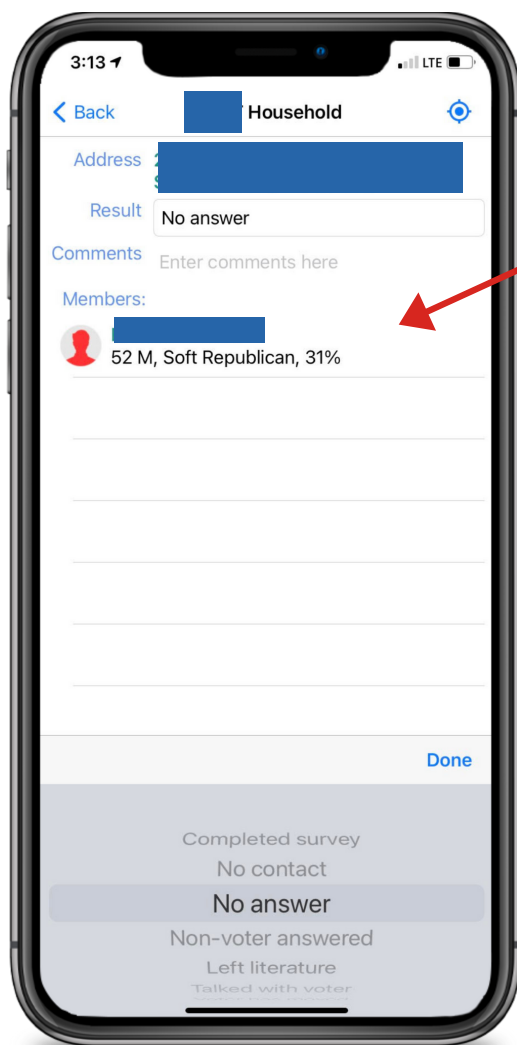


From Map View, hit the pin, then hit the information icon to pull up that household's information and start entering data.



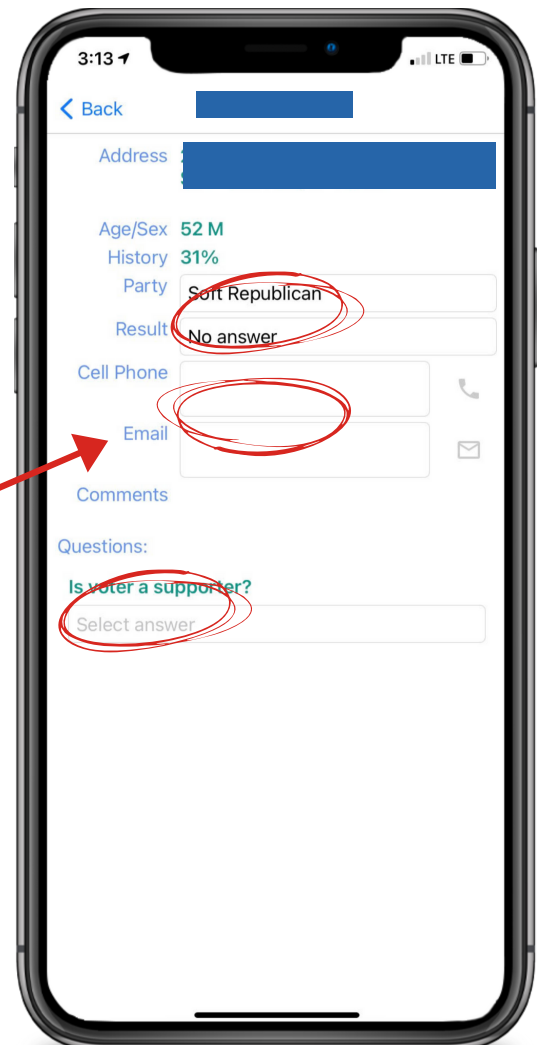
### Volunteers

In household view, you can enter the status of your canvassing of that household by clicking the "Results" box and selecting an option from the scroll wheel at the bottom of the screen. If you managed to talk to a registered voter, you can click on their name and enter in information about them specifically, or just stay on the household screen and enter in general household information.



Hit the voter you talked to in order to enter information about that specific voter

On the voter screen, you can enter in answers to your survey's questions, update their party status, and add comments and contact information



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### Volunteers

Use the "back" button to go back to your walking list and continue your canvassing after talking to a voter and entering the information you gathered.

