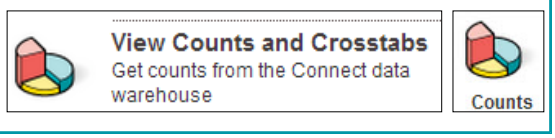
8. Reports and Stats

What	This Quick Sheet will show you how to use the Counts and Crosstabs tool in Connect to analyse your data.
Why	You will often need to count things like your canvass stats, demographics or postcode sectors. Counts and Crosstabs enables you to do that quickly and easily.
Where	You can access Counts and Crosstabs from the bottom of the middle panel of the Main Menu, or from the top of the My List screen. 

Counting my list

You will often want to count the number of people in different categories in your list.

Once you have created your list, in the My List screen, click on the 'Counts' button and select 'Run Quick Counts and Crosstabs'. Click 'Next' to load the Counts and Crosstabs screen.

The screen initially opens with no options selected, so will simply show the number of people in your list.

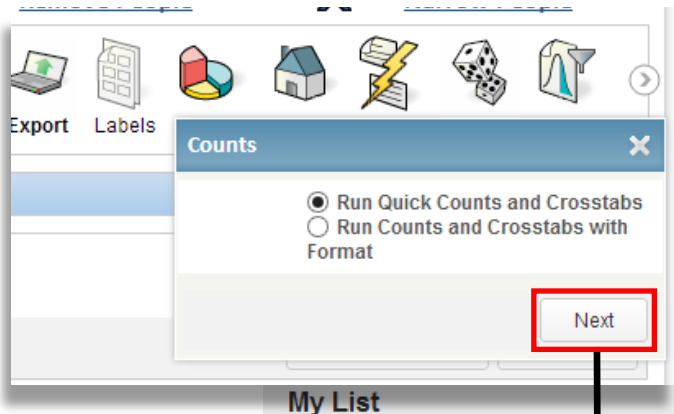
Generated vs Real Time

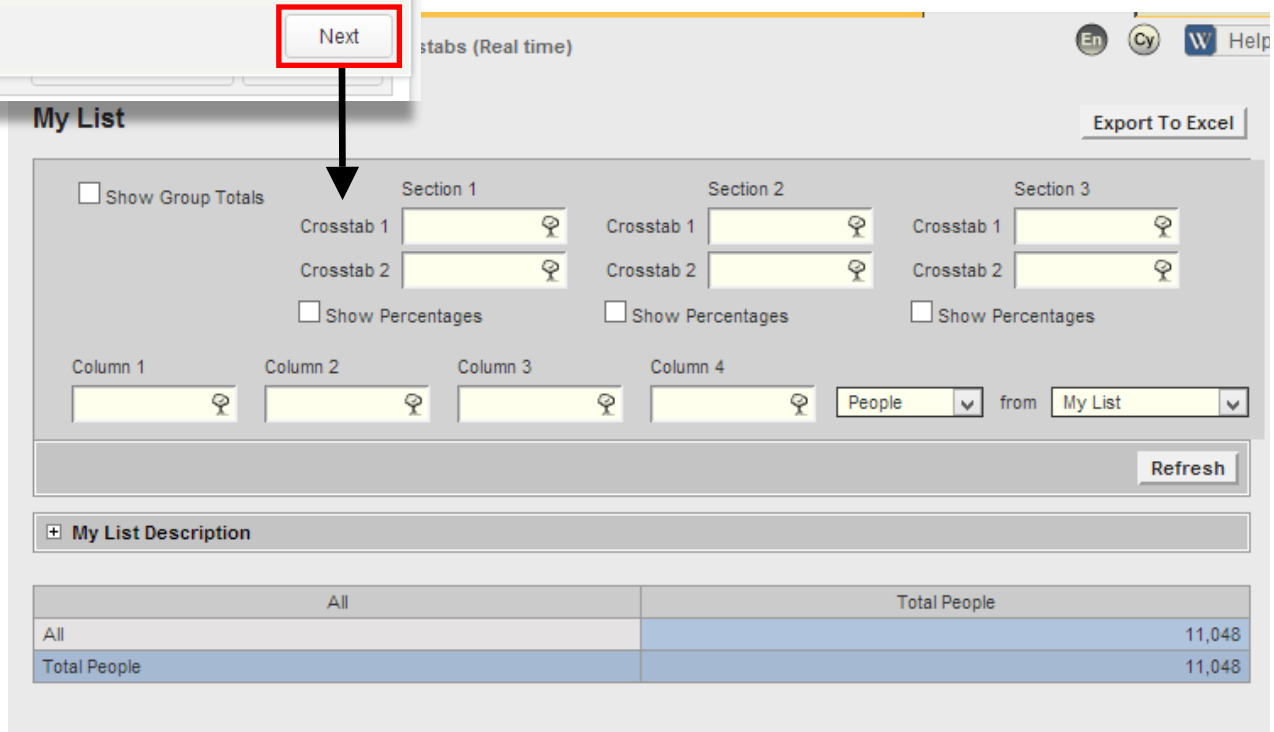
There are two types of counting that will occur in Counts and Crosstabs - Generated and Real Time.

For lists smaller than 50,000 voters, Real Time counts will compute a live count of the voters as requested.

For lists over 50,000 voters, the numbers displayed will have been counted the night before.

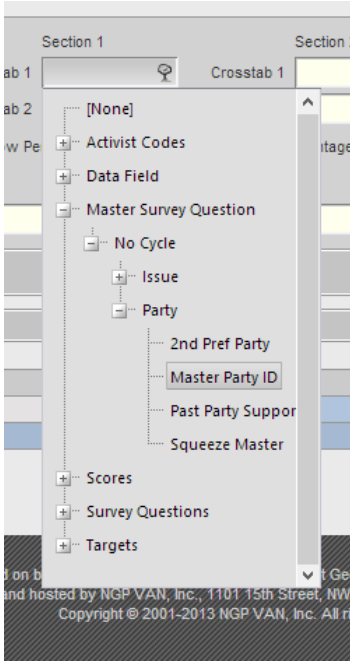
You can see which mode you are in at the top of the screen.





Example simple count: Voting intention by Polling district

Step 1 - Select Master Party ID

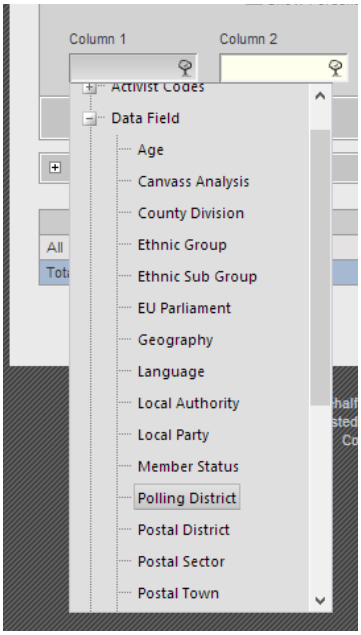


Click in the box labelled 'Section 1' and 'Crosstab 1'.

Click on the '+' next to 'Master Survey Questions', then again for 'No Cycle' and then 'Party'.

Click 'Master Party ID' to select it.

Step 2 - Select Polling District

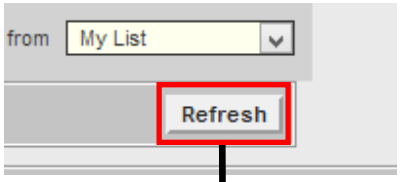


Click in the box labelled 'Column 1'.

Click on the '+' next to 'Data Field'.

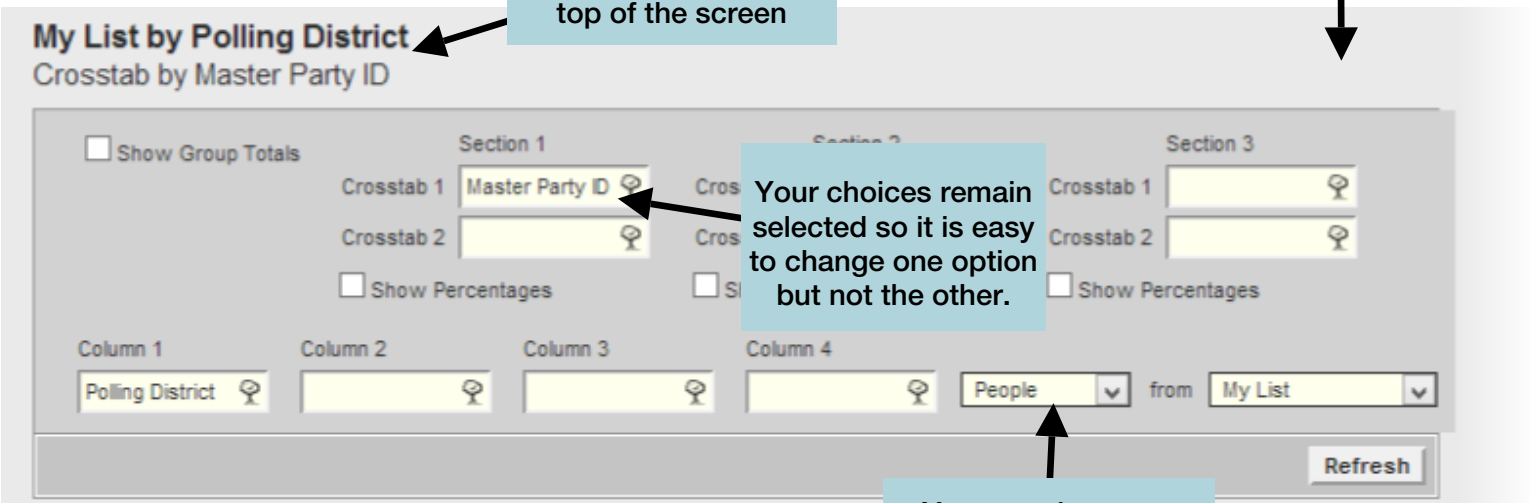
Click 'Polling District' to select it.

Step 3 - Click Refresh



Step 4 - View your results

A summary of your table is shown at the top of the screen



Your choices remain selected so it is easy to change one option but not the other.

You can choose to show counts of people or households

	Master Party ID											
Polling District	Labour	Soft Labour	Liberal Democrat	Probable	Conservative	Soft Conservative	Green	Soft Green	SNP	Soft SNP	BNP	UKIP
DA	154	84	202	101	14	43	0	0	0	0	0	1
DB	79	58	152	132	22	32	0	0	0	0	1	1
DC	179	136	282	121	37	31	1					0
DD	114	77	209	89	7	22	0					0
DE	78	48	202	85	12	18	1					0
DF			335	152	25	30	0					0
DG			105	48	6	9	0					0
DH			203	83	11	14	1	0	0	0	0	0
DI			192	65	12	18	0	0	0	0	1	0
Total People	1,074	708	1,882	876	146	217	3	1	0	0	7	2

Each possible answer to the Master Party ID Question has a column

Column 1 shows the Polling District Name

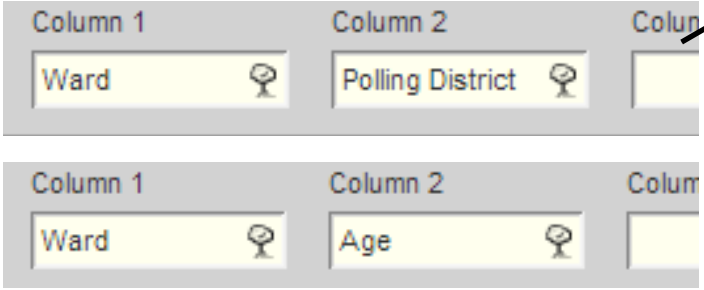
Using more than one column

You can group the rows in your table by using more than one column.

For example, counting a list containing voters from two different wards. You may wish to show the data in rows of polling district, but grouped by ward.

Alternatively, you may wish to see data broken down by a data field, such as age, repeated for each ward.

The data rows will be sorted by Column 1 first, then Column 2 and 3 if they are selected.



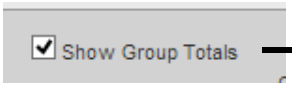
Cathays	BD	2,466
Cathays	BE	1,643
Cathays	BF	2,660
Cathays	BG	2,373
Cathays	BH	1,332
Pentwyn	DA	1,119
Pentwyn	DB	1,140
Pentwyn	DC	1,387
Pentwyn	DD	1,164

Cathays	35 to 49	125
Cathays	50 to 64	170
Cathays	65+	190
Cathays	Unknown	14,562
Pentwyn	18 to 24	619
Pentwyn	25 to 34	396
Pentwyn	35 to 49	608

Showing group totals for columns

When using multiple columns, you can choose whether to show a totals for each group.

If you check the 'Show Group Totals' box, an additional line will be included for each Column 1 item. This will show the total number. Each Column 2 item will then be displayed below the total for the Column 1 group.



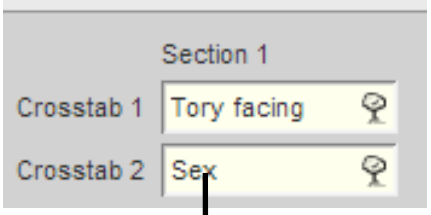
Cathays		15,264
	CF10	2,844
	CF14	573
	CF24	11,819
	Unknown	28
Pentwyn		11,048
	CF23	11,039
	Unknown	9
Total People		26,312

Using Crosstabs

Crosstabs allow you to nest data within the rows. This is similar to using the additional columns above.

The field selected in Crosstab 1 will be displyed first. Each category will then be split by the field chosen in Crosstab 2.

In this example, each target group within the Tory Facing target pool is shown divided in to male and female voters.

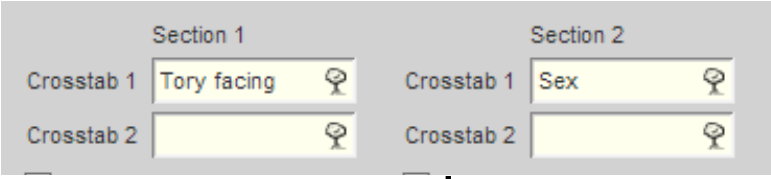


	Tory facing by Sex																		
	Supporters			Switch			Squeeze			Stay at home			Unknowns			Unknown			
All	Male	Female	Unknown	Male	Female	Unknown	Male	Female	Unknown	Male	Female	Unknown	Male	Female	Unknown	Male	Female	Unknown	Total People
All	1,159	1,472	47	197	256	2	1,589	1,764	19	196	207	4	7,410	8,616	3,374	0	0	0	26,312
Total People	1,159	1,472	47	197	256	2	1,589	1,764	19	196	207	4	7,410	8,616	3,374	0	0	0	26,312

Using Sections

Sections allow you to display additional sets of data nest data within the rows. Using sections do not nest the data, but simply allow you to display two or three sets of data.

Using sections can make the data difficult to read on screen, but is very useful if you want to export a few sets of counts to Excel in one file.

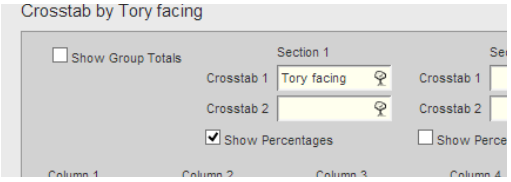


All	Tory facing						Sex			Total People
	Supporters	Switch	Squeeze	Stay at home	Unknowns	Unknown	Male	Female	Unknown	
All	2,678	455	3,372	407	19,400	0	10,551	12,315	3,446	26,312
Total People	2,678	455	3,372	407	19,400	0	10,551	12,315	3,446	26,312

Displaying percentages

You can choose whether to include percentage columns in your table.

Below the boxes where you choose fields for each Section is a tick box labelled 'Show Percentages'. If you tick this, the percentage will be shown to the right of each data value. The figures are the percentage of the total for the entire row, not just within each crosstab.



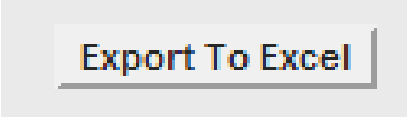
Ward	Tory facing						
	Supporters	%	Switch	%	Squeeze	%	Stay at home
Cathays	780	5.11	90	0.59	768	5.03	85
Pentwyn	1,898	17.18	365	3.30	2,604	23.57	322
Total People	2,678	10.18	455	1.73	3,372	12.82	407

Export to Excel

You can export the data table you create in Counts and Crosstabs in a file compatible with Microsoft Excel.

This is useful if you wish to analyse the data further, produce graphs, or simply keep a fixed record for future reference.

Simply click the 'Export to Excel' button to download a file.

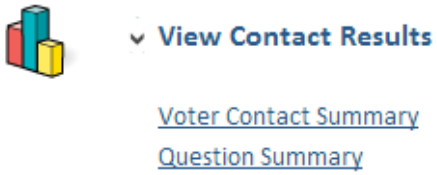


Keep on learning - these Quick Sheets will build on what you have learnt here:

8.2 - Question Summary	Learn how to look at the results for a particular question.
8.3 Voter Contact Summary	Learn how to look at a summary of the number of voter contacts.

Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users

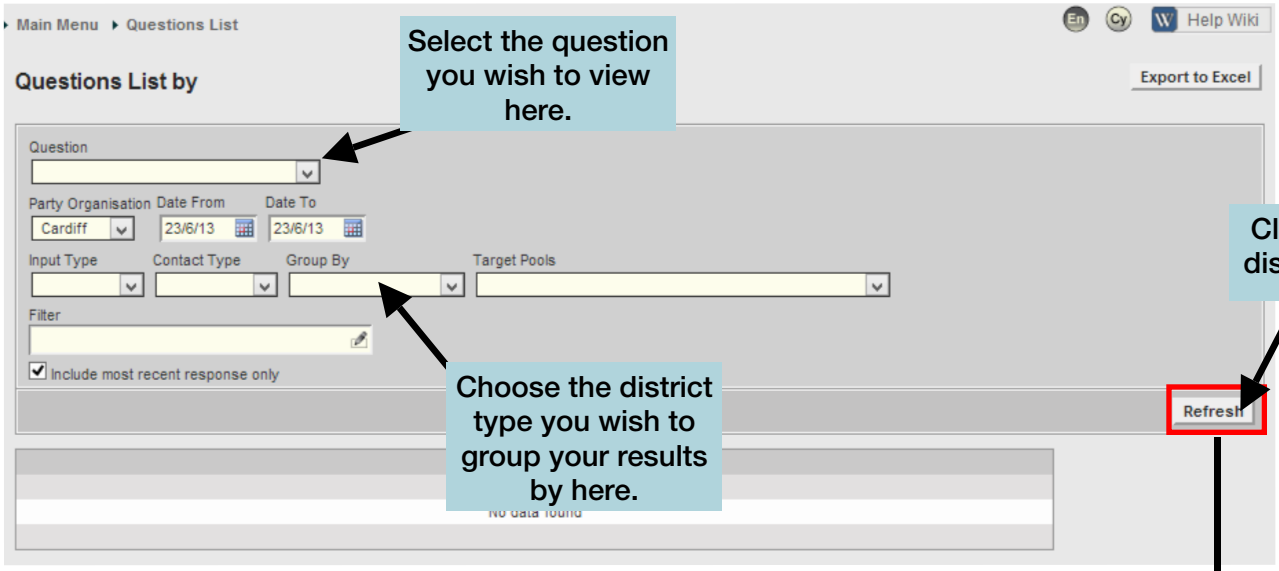
What	This Quick Sheet will show you how to use the Question Summary screen in Connect.
Why	If you wish to just quickly see what resposes you are getting to a particular question. This can be very useful with Survey questions.
Where	You can find the Question Summary under 'View Contact Results', in the 'Analyse Data' section of the Main Menu screen.

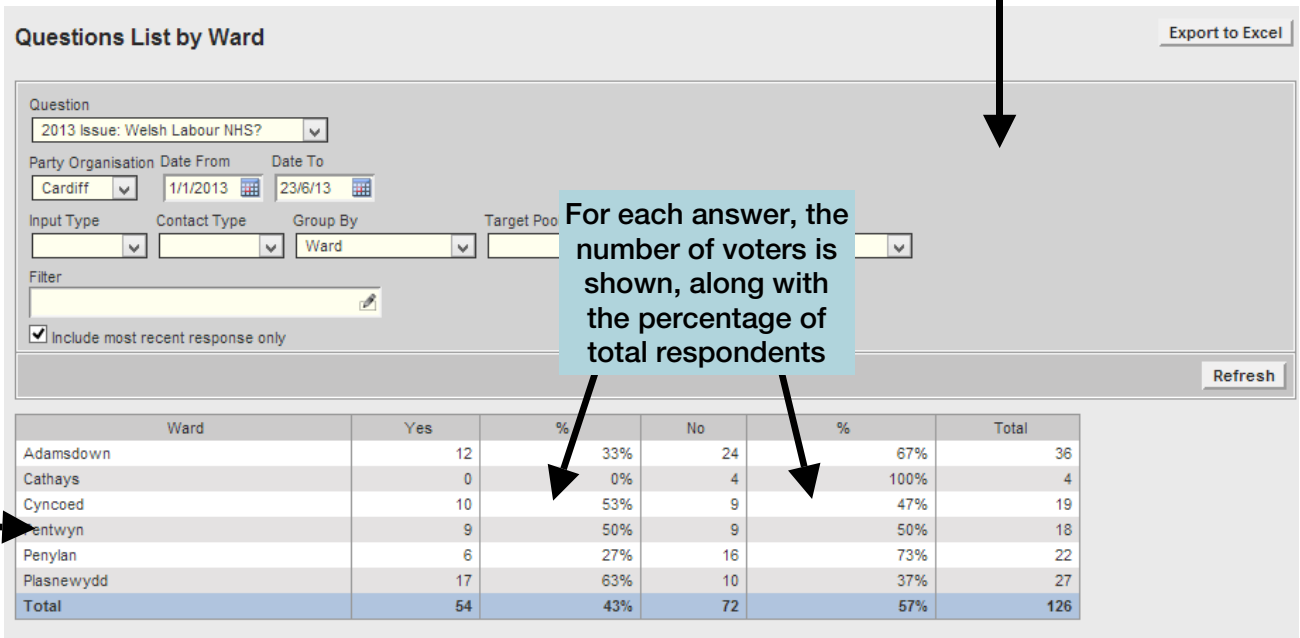


Question Summary

When you enter the Question Summary screen, the Party Organisation and Date range will be selected by default.

You must then select an option in the 'Question' and 'Group By' drop downs boxes before any results will be displayed.



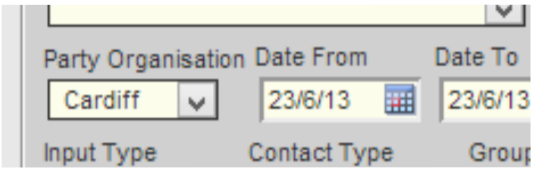


Ward	Yes	%	No	%	Total
Adamsdown	12	33%	24	67%	36
Cathays	0	0%	4	100%	4
Cyncoed	10	53%	9	47%	19
entwyn	9	50%	9	50%	18
Penylan	6	27%	16	73%	22
Plasnewydd	17	63%	10	37%	27
Total	54	43%	72	57%	126

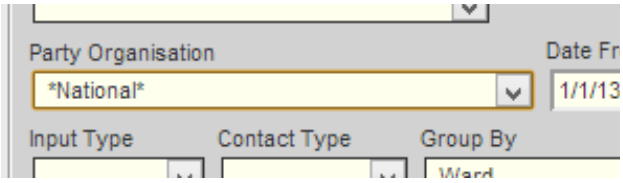
A table is then displayed broken down by the district type you selected (in this example,

Other options

Party Organisation



The Party Organisation will be your own by default. If you wish to see data entered by users from outside your Local Party, you will need to change the Party Organisation to '*national*'.



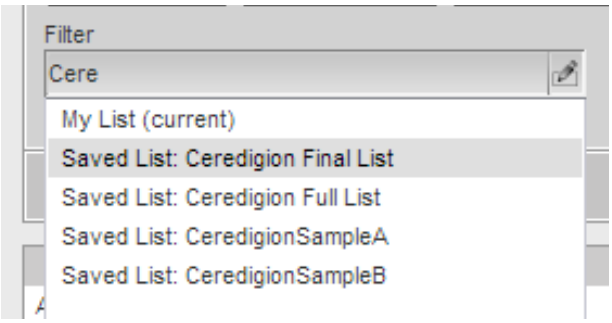
This is particularly important to remember if you have had external users calling a phone bank for you.

Restricting the list

By default, the Question Summary screen will show all voters you have access to.

You may wish to restrict the voters which are being counted.

You can filter by a Saved List by simply typing the name of the list in to the 'Filter' box. Just select the list you want when it drops down.

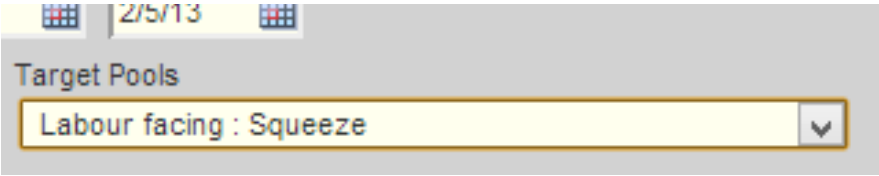


It must be a Saved List, rather than a Saved Search.

You will also have the option to filter by your current 'My List'.

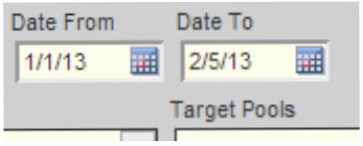
You can also use the 'Target Pools' drop down menu to choose a Target Pool sub group to restrict the list to.

You can use Target Pools and Filter together if you wish.



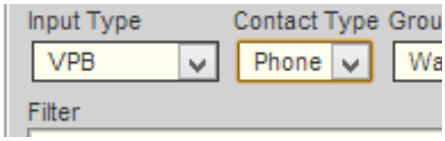
Date Range

You can restrict answers to a particular range of dates. You can simply type the required dates in the 'Date From' and 'Date To' boxes.



Input & Contact Type

If you wish to only view one type of contact, eg Phone or Doorstep, simply select the appropriate option in the Input or Contact type boxes.



Keep on learning - these Quick Sheets will build on what you have learnt here:

8.2 - Question Summary	Learn how to look at the results for a particular question.
8.3 Voter Contact Summary	Learn how to look at a summary of the number of voter contacts.

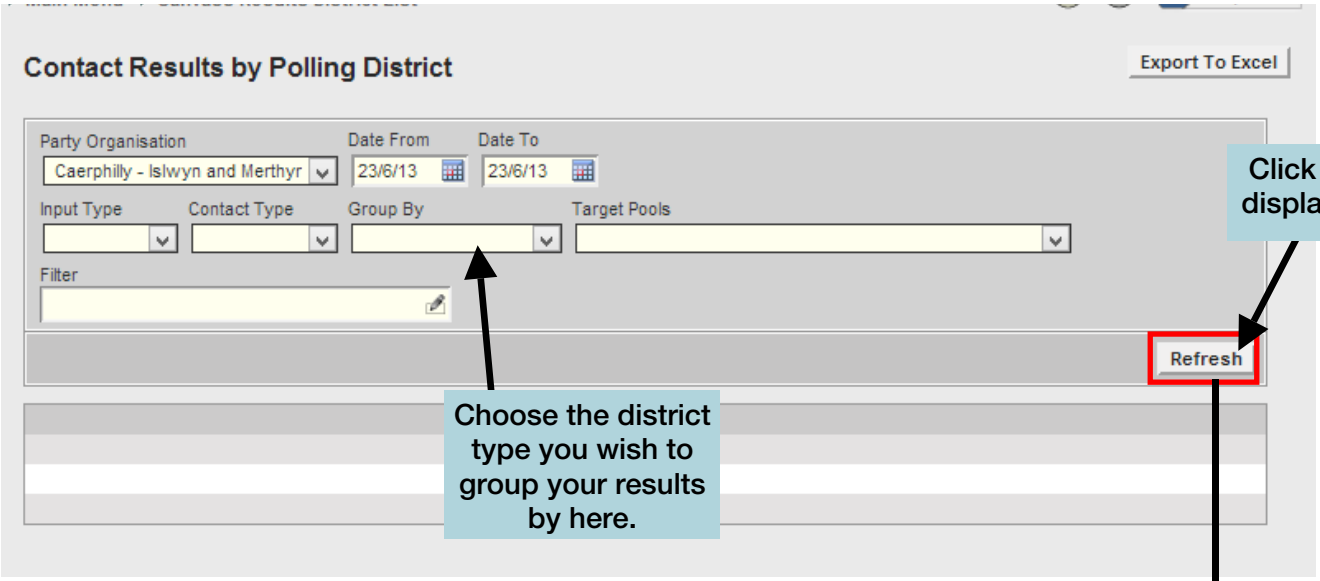
Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users

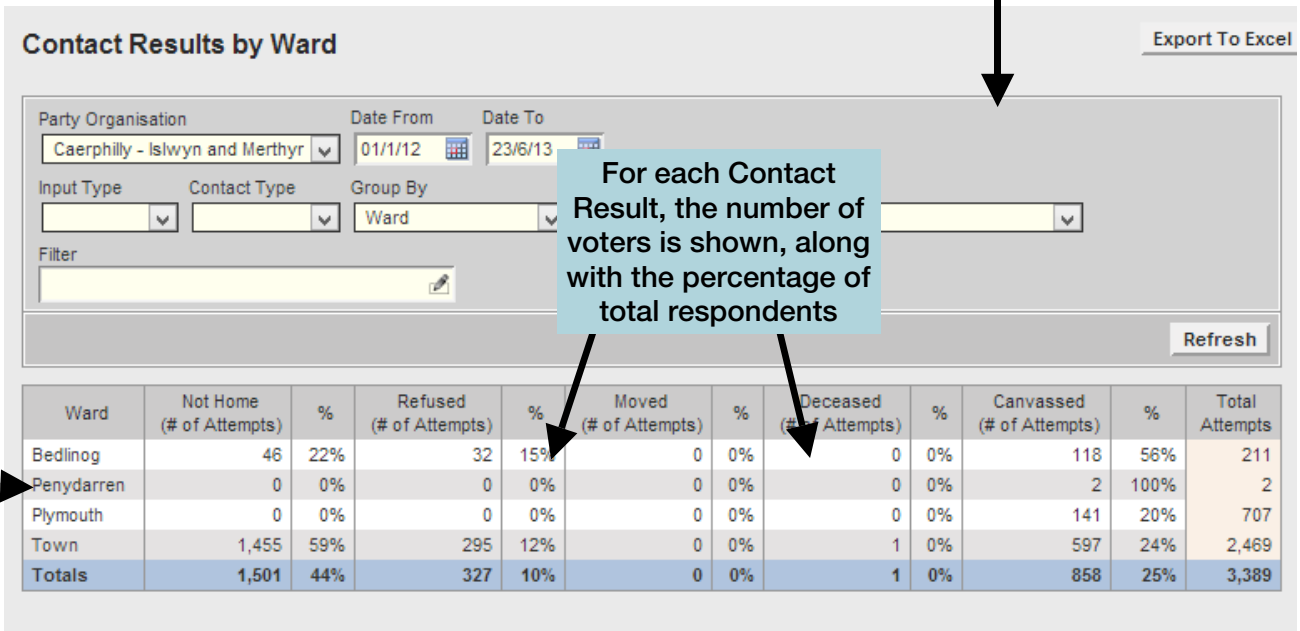
What	This Quick Sheet will show you how to use the Voter Contact Summary screen in Connect.
Why	You will use the Voter Contact Summary to quickly see the number of contacts made in an area . This can be very useful for tracking your campaign progress.
Where	You can find the Voter Contact Summary under 'View Contact Results', in the 'Analyse Data' section of the Main Menu .  View Contact Results Voter Contact Summary Question Summary

Voter Contact Summary

When you enter the Voter Contact screen, the Party Organisation and Date range will be selected by default.

You must then select an option in the 'Group By' drop downs boxes before any results will be displayed.





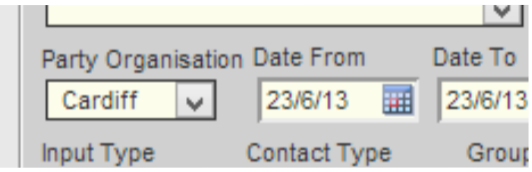
Ward	Not Home (# of Attempts)	%	Refused (# of Attempts)	%	Moved (# of Attempts)	%	Deceased (# of Attempts)	%	Canvassed (# of Attempts)	%	Total Attempts
Bedlinog	46	22%	32	15%	0	0%	0	0%	118	56%	211
Penydarren	0	0%	0	0%	0	0%	0	0%	2	100%	2
Plymouth	0	0%	0	0%	0	0%	0	0%	141	20%	707
Town	1,455	59%	295	12%	0	0%	1	0%	597	24%	2,469
Totals	**1,501**	**44%**	**327**	**10%**	**0**	**0%**	**1**	**0%**	**858**	**25%**	**3,389**

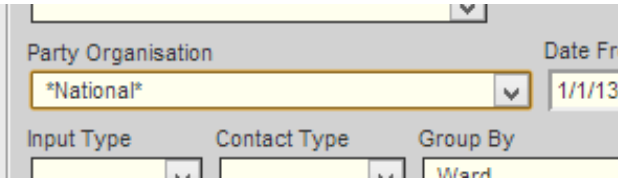
Other options

Party Organisation

The Party Organisation will be your own by default. If you wish to see data entered by users from outside your Local Party, you will need to change the Party Organisation to '*national*'.

This is particularly important to remember if you have had external users calling a phone bank for you.



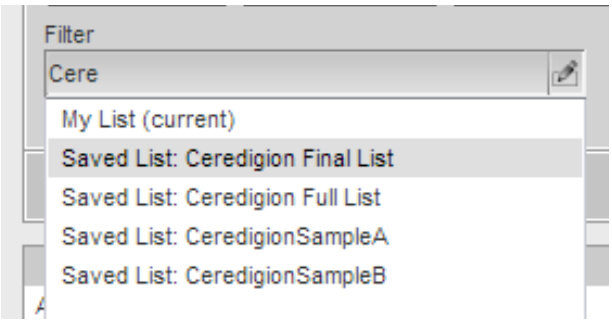


Restricting the list

By default, the Voter Contact Summary screen will show all voters you have access to.

You may wish to restrict the voters which are being counted.

You can filter by a Saved List by simply typing the name of the list in to the 'Filter' box. Just select the list you want when it drops down.

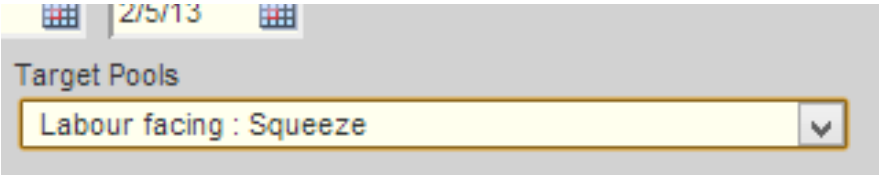


It must be a Saved List, rather than a Saved Search.

You will also have the option to filter by your current 'My List'.

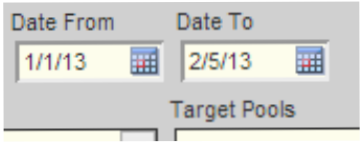
You can also use the 'Target Pools' drop down menu to choose a Target Pool sub group to restrict the list to.

You can use Target Pools and Filter together if you wish.



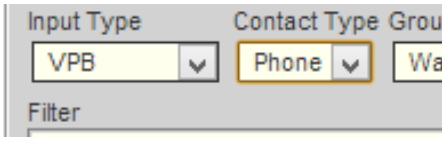
Date Range

You can restrict answers to a particular range of dates. You can simply type the required dates in the 'Date From' and 'Date To' boxes.



Input & Contact Type

If you wish to only view one type of contact, eg Phone or Doorstep, simply select the appropriate option in the Input or Contact type boxes.



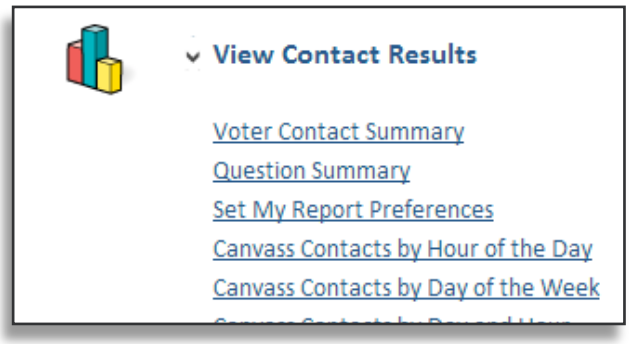
Export to Excel

You can export the data table you create in Counts and Crosstabs in a file compatible with Microsoft Excel.

This is useful if you wish to analyse the data further, produce graphs, or simply keep a fixed record for future reference.

Simply click the 'Export to Excel' button to download a file.

Setting Default Display Preferences



The settings for the Voter Contact Summary screen can be specified. In the View Contact Results section of the Main Menu Screen, click on 'Set My Report Preferences'.

There are two sections of settings. First, you can set the defaults for the options detailed on Page 2, including Date Range, District type, Input Type and Contact Type.

As well as a Specific Date Range, you can choose instead for a rolling range, such as Yesterday or Last Week.

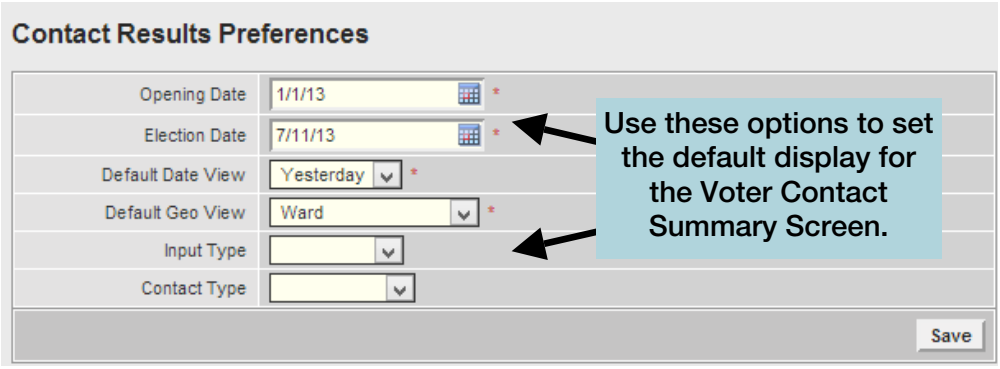
The second set of options allow you to change the columns that will be displayed in the results section of the screen.

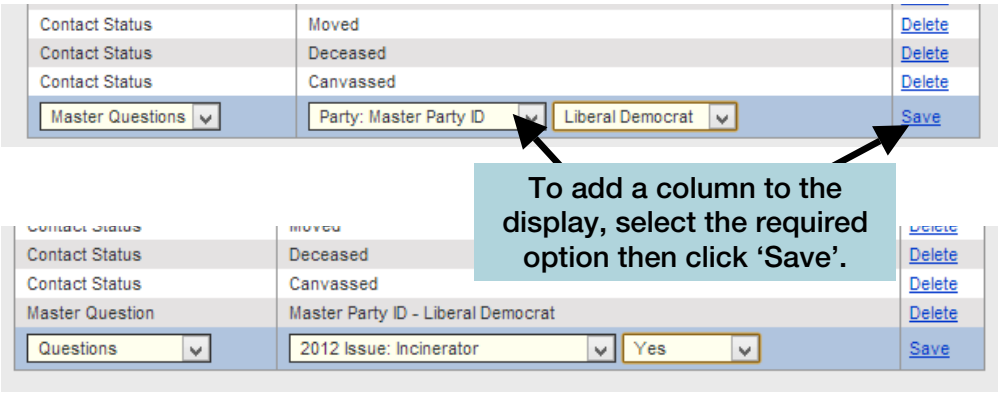
You can add columns from Contact Status, Questions, Master Questions or Tags.

So for example, you may wish to add the Master Party ID result of 'Liberal Democrat' to see how many people contacted are supporters.

Alternatively, you may wish to show an issue question if, for example, you were collecting petition signatures.

Simply select the options you wish to see and click 'Save'. These will then be displayed when you return to the Voter Contact Summary Screen.



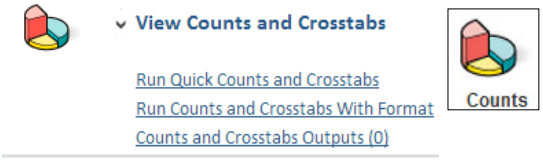


Keep on learning - these Quick Sheets will build on what you have learnt here:

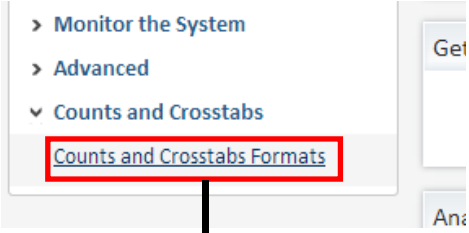
8.4 Counts and Crosstabs Formats	Learn how to produce standardised reports using Counts and Crosstabs Formats
Section 9 - Polling Day	Learn how to run a Polling Day Operation in Connect.

Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users

What	This Quick Sheet will show you how to use Counts and Crosstabs Formats to produce standard formats for Counts and Crosstabs..
Why	If you regularly want to look at the same table of data in Counts and Crosstabs, then creating a Format will enable you to save your settings so you don't need to enter them every time.
Where	You can access Counts and Crosstab Formats under 'View Counts and Crosstabs', in the 'Analyse Data' section of the Main Menu and from the My List screen.



Creating a new Counts and Crosstabs Format



To use Counts and Crosstabs Formats, you must first create some formats. These define the settings you want to use.

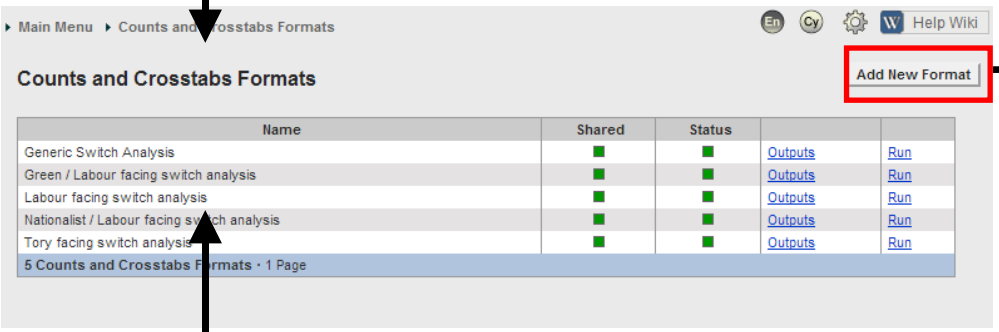
From the Main Menu, on the bottom left, click 'Counts and Crosstabs Formats' in the 'Counts and Crosstabs' section.

This link will open a page which lists your currently available Counts and Crosstabs Formats.

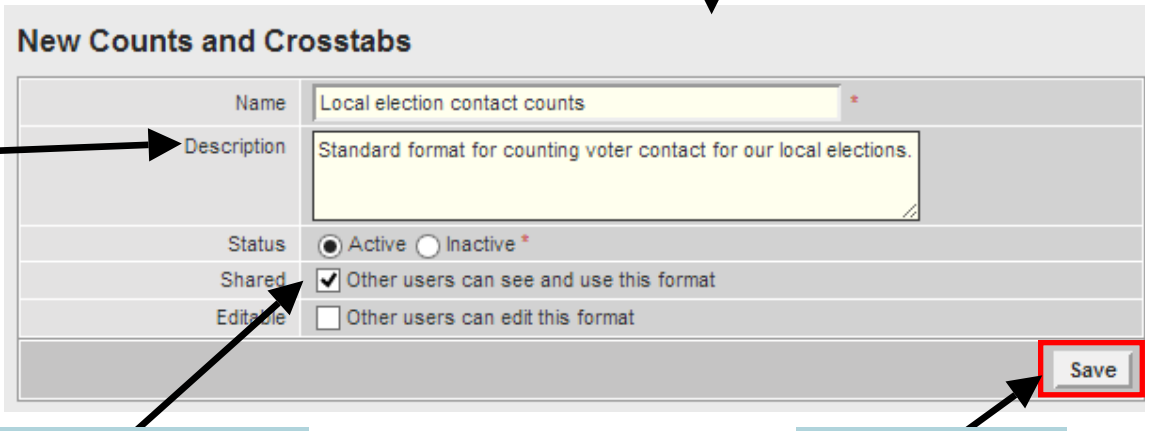
Click 'Add New Format' to create a new Counts and Crosstabs Format.

A form is then opened for the New Counts and Crosstabs Format. Simply give it a name and a description if required.

You also then have the option to choose whether you wish to share your Format with other users, and whether you want them to be able to edit



Existing Counts and Crosstabs Formats are listed here. Formats you have created will be a link. Click the name to edit them.



Choose whether you wish to share your format, and whether you want other users to be able to edit it.

When your settings are all entered, click Save.

Editing your Counts and Crosstabs Format

Once you have created your format, the edit screen will then be loaded. You can edit the information previously entered, and also create the settings you want the format to have.

These settings work in the same way as those in the normal Counts and Crosstabs screen.

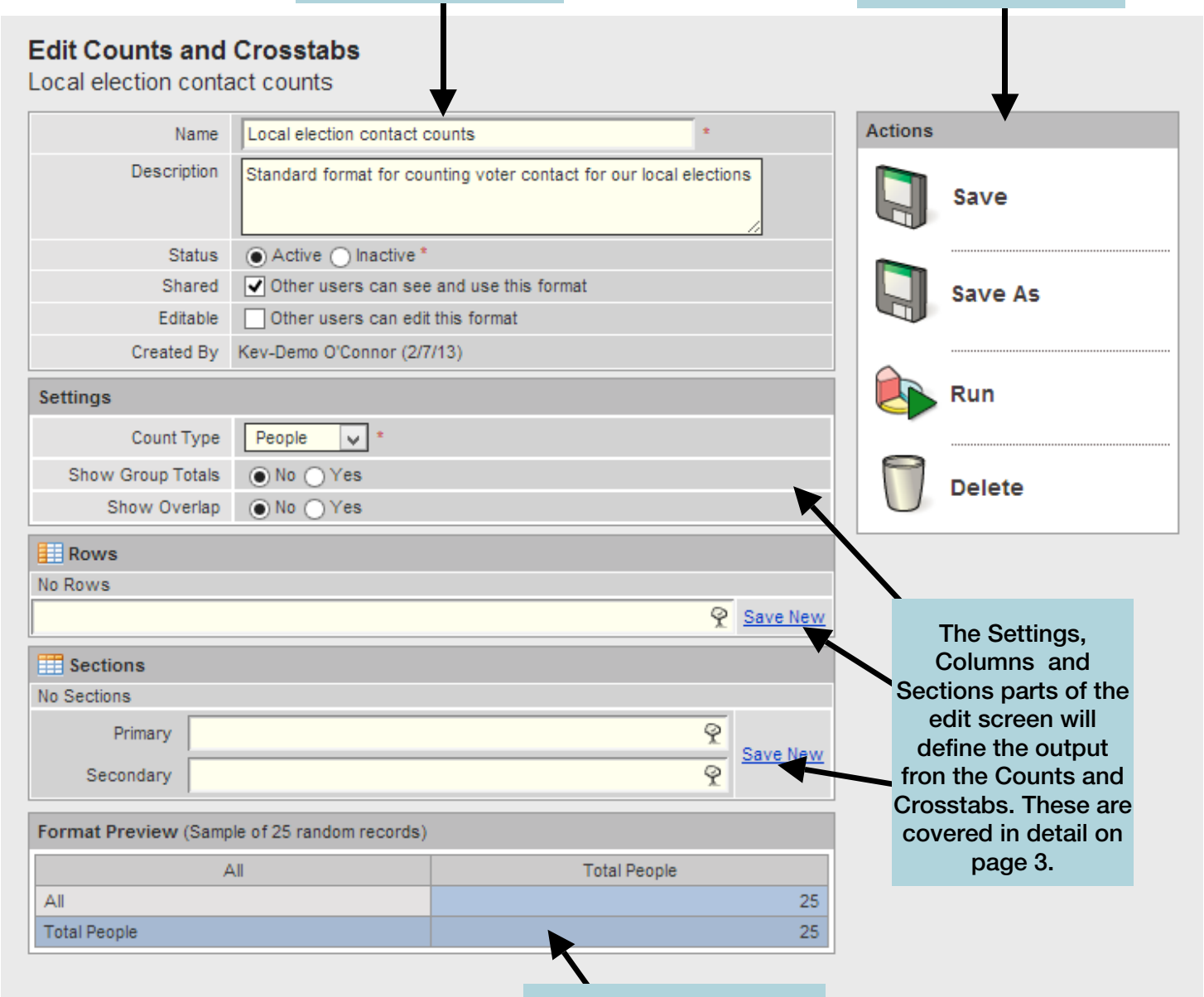
If you are not familiar with these settings, it is worth returning to Quick Sheet 8.1 on Counts and Crosstabs Formats.

It will be much easier to create your Formats once you are comfortable with using the main Counts and Crosstabs tool.

Once you have saved your format, you can return to the edit screen to make changes at any time. Simply click on the name of the Format on the list screen (see page 1).

You can edit the name, description and sharing settings that you set when you created the format here.

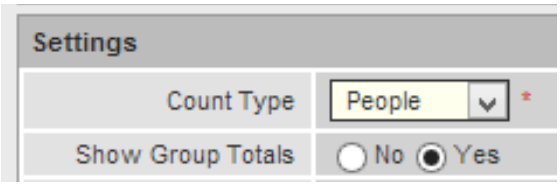
You can Save As to create a copy of the format. You can also run the format from this screen and delete it.



The Settings, Columns and Sections parts of the edit screen will define the output fron the Counts and Crosstabs. These are covered in detail on page 3.

The Format Preview will automatically update as you make changes to the above settings.

Changing the settings



These settings are the same as in the main Counts and Crosstabs screen.

You can choose whether you want the table to count People, Doors or Phones.

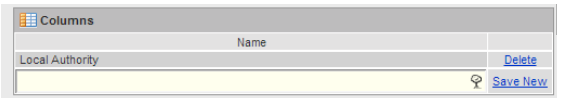
You can also select whether you wish to show Group Totals.

This applies when a second row is selected below.

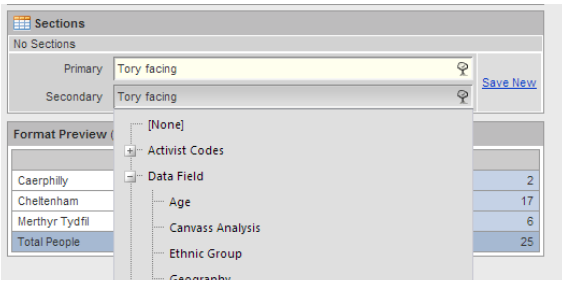
Adding a column

Just like in Counts and Crosstabs, you can set multiple columns to display in your Counts and Crosstabs format.

In the 'Columns' section, simply select the field that you wish to use and click 'Save New'. You will then have the option to add additional columns or delete those you have already added.



Adding a section

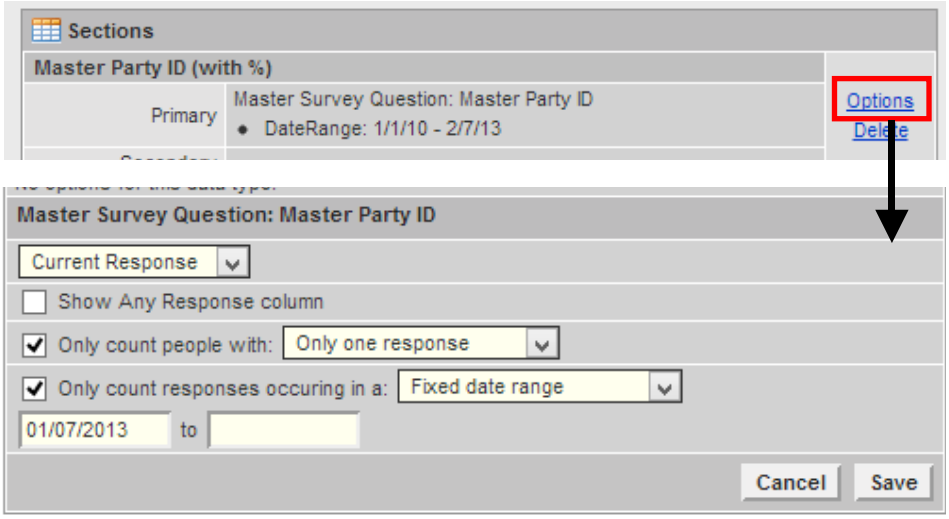


To add a section, simply select your data field, as you did to add a column.

In the sections, you have the option to add a Secondary field, which will be displayed nested within the first. This behaves the same as the Crosstabs and Sections in the main Counts and Crosstabs tool.

Crosstab Options

When you have created a section, a 'Options' link will appear alongside it.



You have the option to choose whether to show percentages for all crosstabs.

For Survey Questions and Master Survey Questions, you also have further options.

Response - Choose whether to count only the Current Respose, only Previous responses or All Responses.

Show Any Response Column - Checking this will include a column in the table for the total number of people who have given any answer to your question.

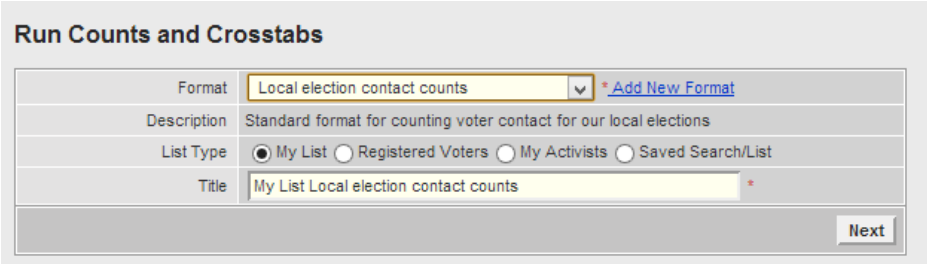
Only count people with - Choose whether to count people with only one response, or more than one response.

Only count responses occuring in a - Choose from fixed date range or number of days. Leave the second date range box blank to always count up to current date.

Running Counts and Crosstabs Format

You run your Counts and Crosstabs Formats from the Main Menu, the My List screen or the Counts and Crosstabs Formats screen.

To run, simply select, the Format, the List Type you wish to run it on and create a title for the Output.



Counts and Crosstabs Outputs

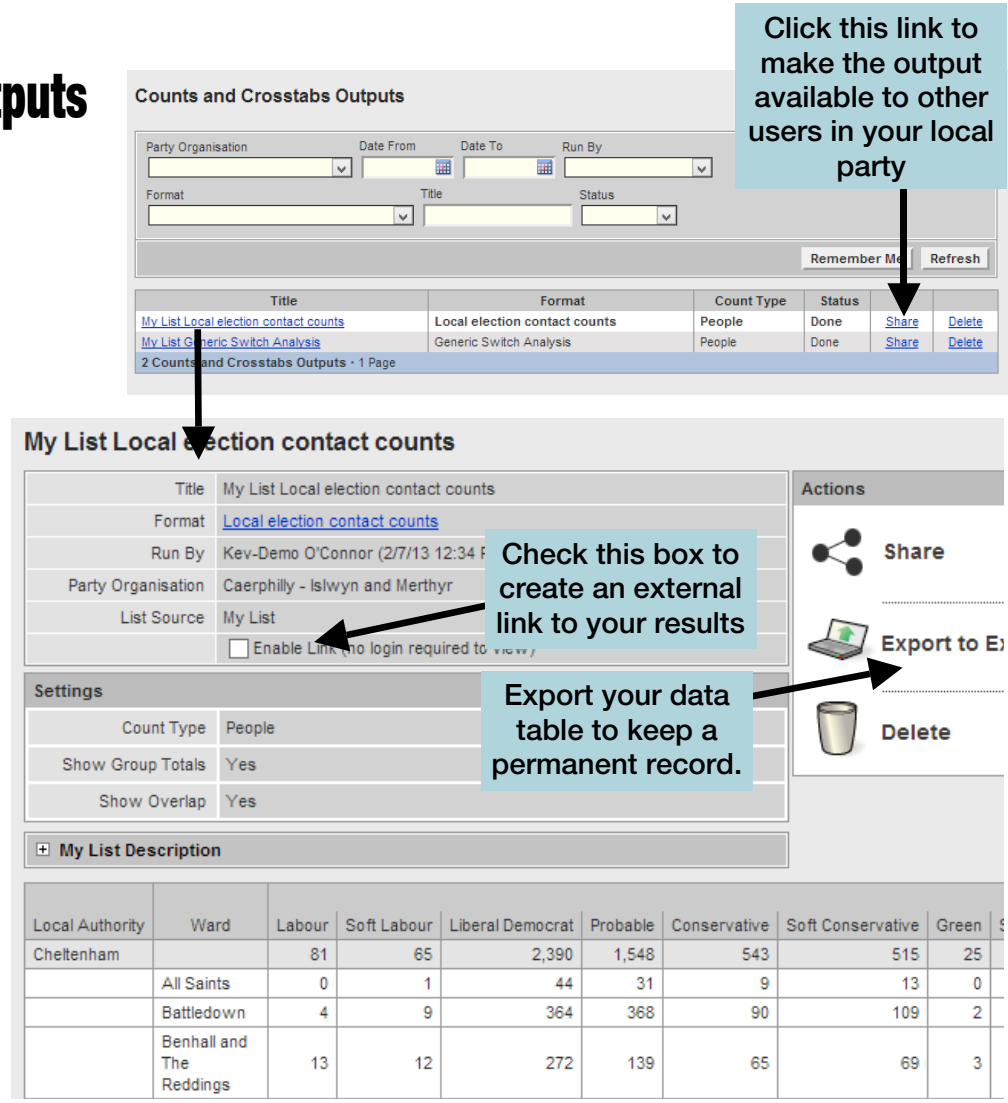
Once you have run your Counts and Crosstabs format, the output will be available from the Counts and Crosstabs Output screen.

The output is fixed and will not change when any new data is entered.

If you wish to repeatedly see changed data for the same set of people, save them as either a fixed list or saved search and simply run the same Counts and Crosstabs format on the list.

You can share your Counts and Crosstabs outputs with other users in Connect using the 'Share' link.

You can make the results available externally via a link by checking the 'Enable Link' box.



Keep on learning - these Quick Sheets will build on what you have learnt here:

Section 9 - Polling Day	Learn how to run a Polling Day Operation in Connect.

Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users