Congress Web Documentation

Purpose

Congress Web is a complete advocacy site system that allows you to create and control every aspect of your advocacy site. It provides tools to create campaigns to recruit new advocates and encourage those advocates to take action on your organization's behalf, including sign up forms, letter, fax and email creation, phone surveys and petitions. A Best Practices section will provide you with industry guidelines for creating campaigns the right way. Beyond a campaign the system can serve as a resource for your advocates with comprehensive legislative sections and information about voter registration and absentee ballots. Tracking site activity is made easy with the Activity Dashboard where you can find reports with detailed analysis for your advocacy campaigns and site analytics. Below, you will find instructions for creating advocacy actions and managing your site. Although this is a comprehensive guide to your advocacy site, there are helpful hints along the way which are accessible by clicking on .

Activity Dashboard

The activity dashboard is the first thing you see after you login to the Administrative tool for Congress Web. It provides an immediate snap shot of activity on your site. You can access a full list of reports containing detailed analysis in the drop down menu at the top. This page is accessible through the Dashboard link in the top menu or the Sections menu on the left.

Scheduled Reports

You will find this in the Tools menu on the left side of your screen. This tool allows you to schedule reports to be sent to you and others on a regular basis.

Sign Up Form

This tool allows you to turn on and create a sign up form for new advocates.

Manage Actions

This section gives you control over the letters, emails, faxes, phone campaigns and petitions on your advocacy site. You will find one such link at the top right of the landing page for this section along with a link to the best practices section. Before getting started it is strongly recommended that you visit the best practices section. The landing page for the Manage Actions section displays the status of current actions. The first column contains the action number which by default you will find in the url for an action on your site. This column will be blank until the action has been published. The column labeled Title contains the action title as it would be seen on your site. If the action has changed since it was last published, there will be an asterisk at the end of the title. NOTE: An action must be published before it becomes accessible through your advocacy site. The column labeled Type indicates the type of action; this will display Message, Phone or Petition. The column labeled Published contains the last publish date for the action and a tool for scheduling an action to be published to coincide for instance with a scheduled email. The column labeled Status allows you to control the visibility of your action once it has been published. If the status is set to hidden, the action is only accessible by direct link and will not be accessible through a list of actions on your site. The remaining columns contain utilities for managing your actions.

Create a Message

1. Click Add New link
2. Click the button next to Message and click Continue
3. Enter a Title Line. Note: If your action is public, this will be visible.
4. Enter a Subject Line which will serve as the subject line for web forms and emails. If you would like the advocate to be able to edit this line, click the Editable by User checkbox.
5. Select a Webform Topic that allows your message to be correctly processed by web forms and gives validity to your message.
6. Select an Issue Type, if applicable
7. *Optional*. Add a short link. Change the take action link (the title will be linked if the take action link is left blank). Add a short description. Add background Information.
8. Click Save and Continue
9. Review the default options and change them if you would like. To change an option, click on the linked option to review your choices.
10. Once you are satisfied with your selections, click Save and Continue.
11. Review the form instructions and setup. All of the default fields are required for web form processing. If you wish to collect additional information, you can create additional fields. Note: Large numbers of fields are a deterrent to successful completion of the action.
12. When you are satisfied with the form, click Save and Continue.
13. Add a message by clicking on the Add New Message button
14. Add a message name that will help you identify this message in the future
15. *Optional*. If you wish to have a subject specific to this particular message, enter a subject.
16. Add your message content
17. Review the closing line options.
18. Add your recipients using the options on the right. If you require more focused targeting, see the advanced options to target recipients in a custom list, who acted a certain way on a bill or vote, or a custom recipient.
19. You can add additional messages to target different recipients with different messages. Once you are satisfied, click Save and Continue. Note: You can return to any section later to make changes.
20. Review follow up options. Change the Thank You page message. Create a thank you message to be sent. Specify content for a tell-a-friend

message. Once you are satisfied with your Follow-up selections, click Save and Continue.

21. Review the action summary. At this point, you can set the status of the message, preview the message and send the preview link to colleagues for review. If you don't want it to be published just yet, keep the status as Draft. However, if you want to indicate that it is ready for publishing, set the status to Public or Hidden. You can change the status on the Manage Actions page. Once you are satisfied with the summary and the status, click Save and Close.
22. If you are ready to publish your message, click Publish Changes to My Site and, when the prompt appears, click Yes.

Create a Phone Call Campaign

1. On the Manage Actions landing page, click the Add New link.
2. Click the button next to Phone and click Continue
3. Enter the Title Line; if this is a public issue, this line will be visible to the public.
4. Select an issue type, if applicable
5. *Optional*. Enter a short link. Change the take action link, if left blank the title will become the action link. Add a short description. Add Background Information.
6. Click Save and Continue
7. Review the default call options. To change an option, click on the option link and review your choices.
8. Click Save and Continue
9. Review the form. If you wish to record additional fields of information, add a field. Remember that too many fields can be a deterrent to taking action.
10. Click Save and Continue
11. To add a new call, click Add New Call
12. Enter a phone call save name that will help you identify the phone call in the future
13. *Optional*. Enter phone call instructions. Add a phone call survey that will record advocate answers after a call has occurred.
14. Add call recipients using the options on the right. If you wish to do more focused targeting, you can use the advanced options to target members of a custom list, those who acted a certain way on a bill or a vote, or a custom recipient.
15. Once you are satisfied with your phone call, click Save and Close.
16. Once you have added all of phone calls necessary to achieve your needs, click Save and Continue.
17. Review follow up options. Change the Thank You page message. Create a thank you message to be sent. Specify content for a tell-a-friend message. Once you are satisfied with your Follow-up selections, click Save and Continue

18. Review the action summary. At this point, you can set the status of the phone action, preview the phone action and send the preview link to colleagues for review. If you don't want it to be published just yet, keep the status as Draft. However, if you want to indicate that it is ready for publishing, set the status to Public or Hidden. You can change the status on the Manage Actions page. Once you are satisfied with the summary and the status, click Save and Close.
19. If you are ready to publish your phone action, click Publish Changes to My Site and, when the prompt appears, click Yes.

Create a Petition

1. On the Manage Actions landing page, click the Add New link.
2. Click the button next to Petition and click Continue
3. Enter a Petition Title. If this a public action, the Petition Title will be visible
4. Select an Issue Type, if applicable
5. *Optional*. Add a Quick Link. Change the take action link, if the link is left blank then the title will act as the action link. Add a petition description. Add petition text.
6. Click Save and Continue
7. *Optional*. Add Petition Targets. Add Petition Sponsors. Add a Petition End Date. Add a Petition Signature Goal.
8. Click Save and Continue
9. Review the form. If you wish to capture additional fields of data, you can add fields. Remember that too many fields can be a deterrent to action.
10. Click Save and Continue
11. Review follow up options. Change the Thank You page message. Create a thank you message to be sent. Specify content for a tell-a-friend message. Once you are satisfied with your Follow-up selections, click Save and Continue.
12. Review the action summary. At this point, you can set the status of the petition, preview the petition and send the preview link to colleagues for review. If you don't want it to be published just yet, keep the status as Draft. However, if you want to indicate that it is ready for publishing, set the status to Public or Hidden. You can change the status on the Manage Actions page. Once you are satisfied with the summary and the status, click Save and Close.
13. If you are ready to publish your petition, click Publish Changes to My Site and, when the prompt appears, click Yes.

**Remember that you must publish actions before they are visible on your site and that, in order to publish, the status must be set to public or hidden.*

Blog

This is an optional for purchase add on that allows you to create and manage blogs. You will find guidelines for blogging in the best practices section.

Bills

This is an optional for purchase add on that allows you to display legislation of interest in your advocacy site. You can add comments and indicate your position on the bill. You can also view recent changes to a bill in your list. If you are a Congress Plus customer, you can indicate that you want Bills displayed on your advocacy site there as well.

Votes

This is an optional for purchase add on that allows you to display votes of interest in your advocacy site. You can add votes with comments and indicate your position on the vote. If you are a Congress Plus customer, you can indicate that you want Votes displayed on your advocacy site there as well.

Web Stickers

This section allows you to select default and custom web stickers to post on your advocacy site. This enables advocates and partner organizations to place web stickers on their sites to direct more attention to your site. You can also create web stickers using images that you import.

Site Options

This is the administrative section for controlling site-wide options for your advocacy site. You can control the sections displayed, features used, main page module options, site styles and the flow for your actions. It is strongly recommended that you visit this section to see all of the options available to you.

Features Tab

In this tab, you can enable/disable the following features and sections:

1. Social Networking - sharing features for each action
2. Bills - for purchase add on to display selected legislation
3. RSS Feed - generates an rss feed containing action information
4. Legislator Search - a zip code/address search for legislators
5. Take Action Issues - displays posted actions
6. Compose Your Own - allows the advocate to create a custom message to their legislators
7. Voter Information - displays voter registration and absentee ballot information by state
8. Key Issues - allows you to highlight an action or actions
9. Tell-A-Friend - allows advocates to tell friends and colleagues about your advocacy site
10. Web Stickers - displays web stickers selected by you to your advocates
11. Votes - for purchase add on to display selected votes

Descriptions of each of the items above can be found when you click on the link next to each one. If there is an edit icon next to a section/feature this means that there are advanced editing options that you can change if you click on that icon.

Main Page Tab
In this tab, you can add, remove, rearrange and edit modules on the landing page of your advocacy site.

Template Tab
In this tab, you can site styles on multiple levels. The Site level controls styles on a site-wide level. The Module level controls styles for sections and main page modules. The key issues level allows you to control the styles for the area highlighting your key issues. The Actions level controls styles for individual actions.

NOTE: Your settings will not be visible on your advocacy site until you click Publish Settings.

Action Flow Tab
In this tab, you can control how your actions generally are displayed.