**Accessing the Site**

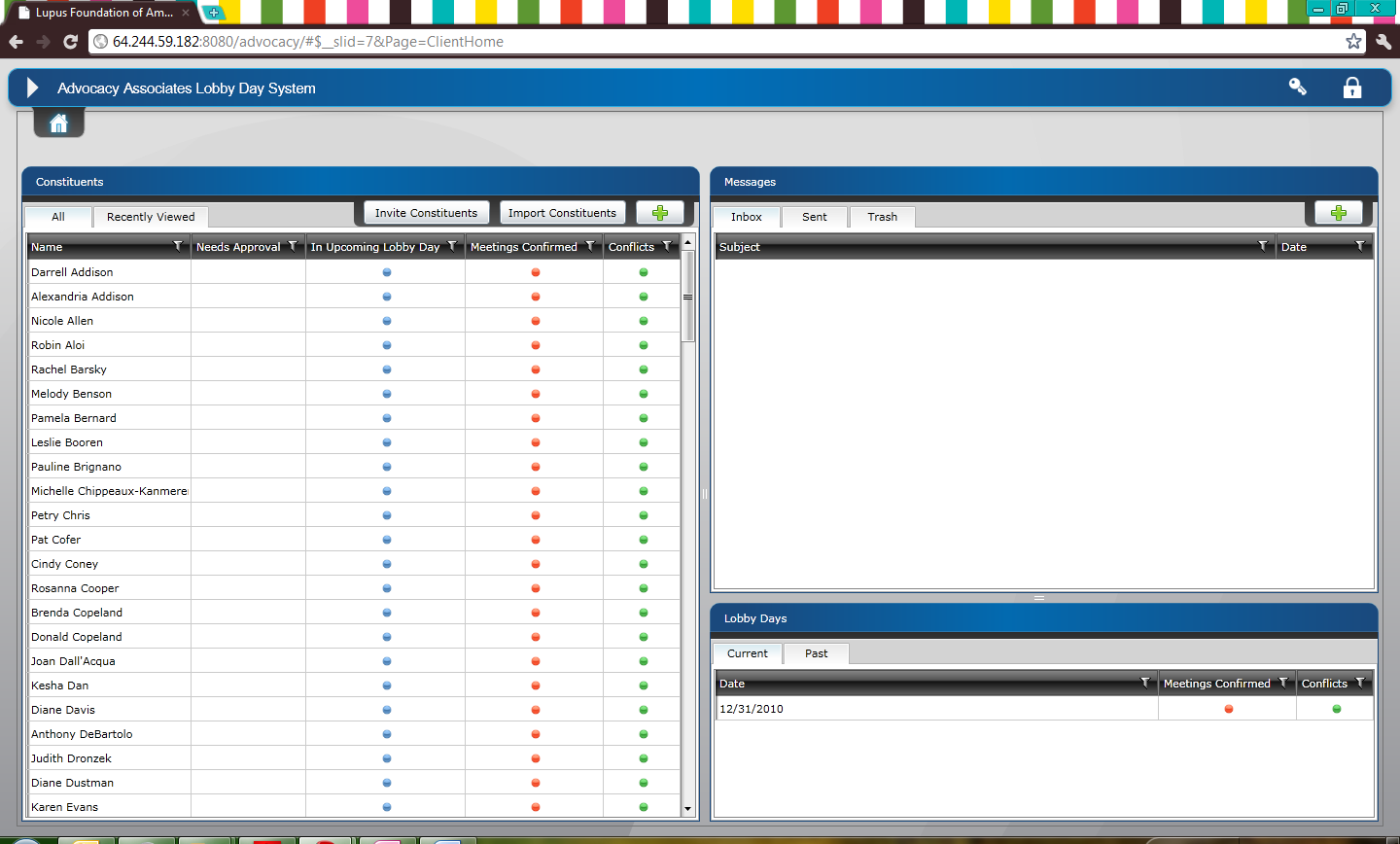
Website: [www.advocacyday.com](http://www.advocacyday.com) \*\*Note: you may need download Silverlight and install it to your computer (free) if you don’t already have it. The site will prompt you to do so if necessary.

Log-in: bikesummit

Password: bikes2015

**Site Map**

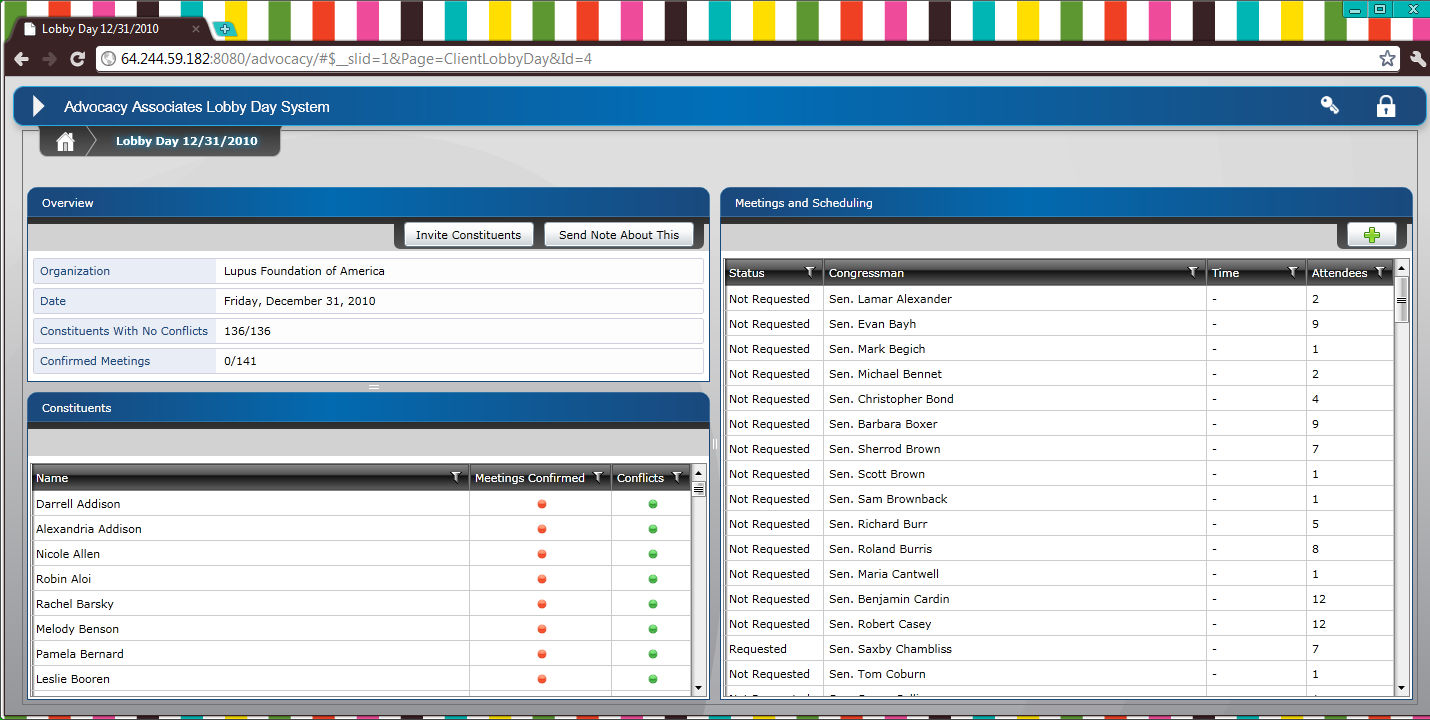
***Main Page***



The main page view allows you to:

* View all Bike Summit Advocacy Day participants (left-hand side)
* Access your current advocacy day (bottom right, double-click on date to get to advocacy day page)
* Send messages to AA staff (top right)

***Advocacy Day Page***



The advocacy day page has the information for your specific advocacy day event. You can view your advocacy day under the “Advocacy Days” section in the lower right hand corner of the main page.

To navigate to your specific advocacy day, double click on your event listed in the “Advocacy Days” section. From there, you can:

* View the participants and make changes to their information (bottom left)
* View all congressional meetings (right side)
* View individual schedules
* Create meeting reports sortable by state, time, meetings with Senators and Representatives, and chambers of Congress

**Functions**

***Viewing Schedule Information***

Through your advocacy day page, you can identify both the advocates from your state and which congressional meetings you need to schedule for those advocates.

To find your state’s participants, go to the “Constituents” box in the bottom left-hand corner, click on “State” to sort by state, and scroll down to find your participants. To find out which congressional meetings you will be scheduling, go to the “Meetings and Scheduling” box on the right-hand side of the screen, click on “District” to sort by state.

You can also filter the “District” column instead of sorting. Next to the word “District” in the district column is a small upside-down triangle. Click on that and type in your state’s abbreviation. This will filter the list to show only your state’s meetings. To keep this filter in place, click on the “Hold Filters” button on the top right-hand side of the screen. The button will turn blue when the filter is held.

***Adding Participants***

If you have additional advocates who would like to participate in the 2015 Bike Summit congressional meetings, we would ask that you pass along their information to Alison Dewey. Her email address is [Alison@bikeleague.org](mailto:Alison@bikeleague.org).

***Adding Meetings***

On the advocacy day page, you can add new meetings by clicking on the green addition link in the “Meetings and Scheduling” box. It allows you to choose the state and the Member from the state, but not add constituents simultaneously while creating the meeting. Once you have created the new meeting, go into the meeting page, click on the “All” tab on the right-hand side, and check the box next to the participant(s) you want to add to that meeting.

***Scheduling Meetings***

State Coordinators can use our Advocacy Day database to schedule their meetings from start to finish. Double-click on a congressional meeting to get to the meeting page. From the meeting page, click on the Word Document icon at the top of the “Meeting Information” box to generate your custom meeting request letter. Next, call the congressional office (the number is provided on the meeting page), to find out who the Scheduler is and where you should send meeting requests to. Once you have this information, send your generated meeting request letter to the scheduler.

To keep track of your meeting, you can use the “Meeting Updates” box on the meeting page to store notes about that specific meeting. Click on the green plus sign to add a note about your meeting and change the status of the meeting from “Not Requested” to either “Requested” or “Confirmed”. Any time you correspond with this office, make a note about it. This way, any time you go back into this meeting do some follow-up you can refer to this section to see what you have done already.

Once you have confirmed a meeting, you can directly input the meeting details into the “Meeting Informaton” box. Include the time of the meeting, who the meeting is with, and the location of the meeting. Under the “Meeting With” section, there is a drop down with many of the office’s staffers already listed. If you are meeting with a staff member that is not listed here, manually type in the staffer’s name in the “Location” box.

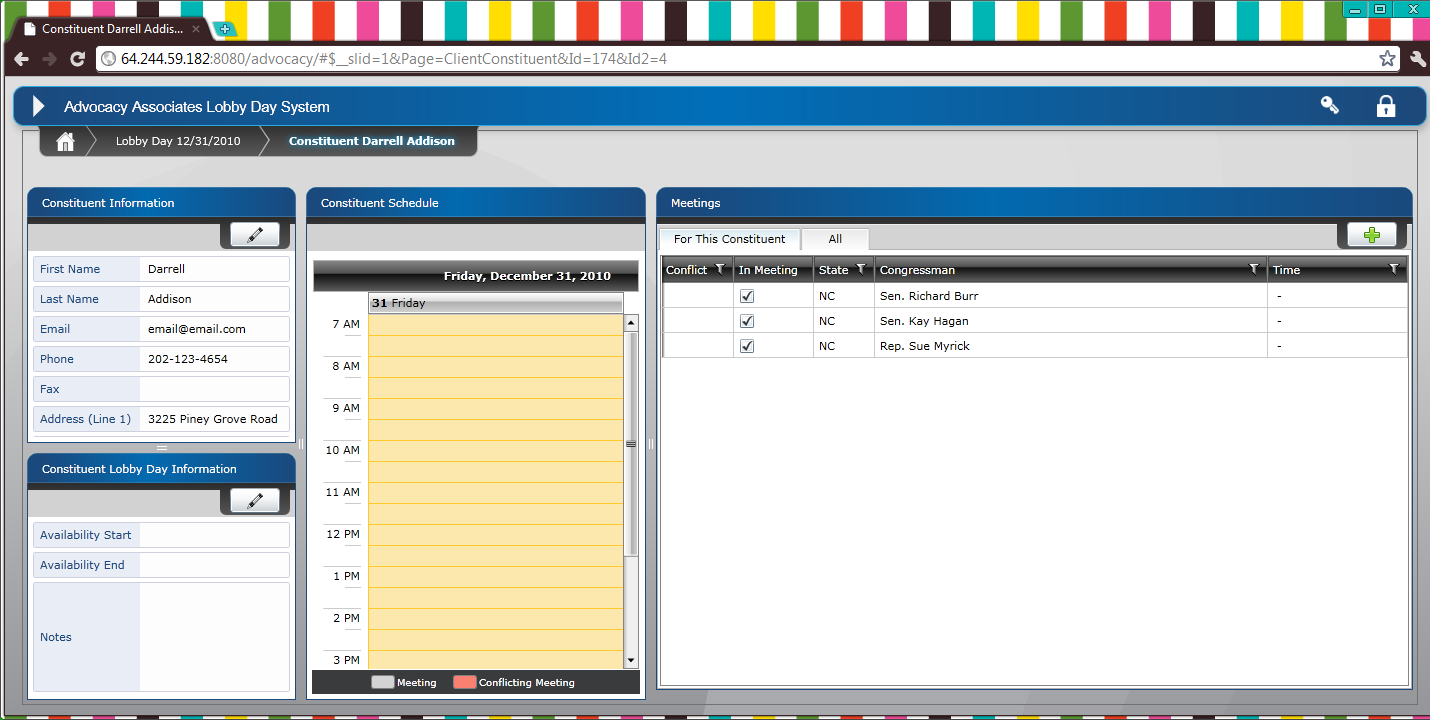
***Generating Meeting Reports***

On your Advocacy Day page, click on the pdf icon in the “meetings and scheduling” box. Then click “uncheck all” and select only your state. You can also choose whether to sort the report by state, time, member meetings or Congressional chamber. When you see a popup with every advocate listed, just click “Ok” (you do **not** need to uncheck all and select only your participants). The report lists all meetings requested even if a time has not been confirmed.

To export individual itineraries for your participants, click on the Word icon at the top of the “Constituents” box on the main Advocacy Day Page. Choose where you would like to save it, and a screen will pop up with every participant selected. Click “Uncheck All,” then sort or filter by state to select only your participants.

***\*\*This year, participants will also be able to get their login information for the AdvocacyDay App on their individual itinerary. It is important that you enter all of your meetings into the Database so they can access their schedule on the app.***

***Viewing/ Editing Participant Information***



Once a participant is added to the system, you can add notes about him/her and let us know of any scheduling changes (early travel schedule, etc.) and view his/her schedule in real time. You can also edit their address and add them to more meetings.

To view information about a specific participant, double click on their name whenever you see it (individuals appear both on the main page and within the specific advocacy day page). To add notes or let us know his/her availability, click on the pen in the “Constituent Advocacy Day Information” box (in the lower left hand corner of the screen).

To edit their address, click on the “pen” in the “Constituent Information” box.

To add them to more meetings, click on the “all” tab and click on the boxes next to the Congressional members the participant would like to see.

When you edit participant information, a note is sent to AA staff so we are aware of any changes made.

***AdvocacyDay App***

The individual itineraries will provide advocates with instructions on how to download our AdvocacyDay app and will also provide them with their personal login to access the app. “AdvocacyDay” is a multi-platform app (iPhone, iPad, Android and web version) that gives advocates another way to view their schedule, map to their meetings, take notes about their meetings, view talking points and leave-behinds, and research their Members of Congress. The itineraries you generate through the Database is the only place participants can find their login for the app, so if you haven’t used our Database to schedule your meetings or if you haven’t at least sent me your meeting information to input into the Database, your participants will not be able to use the app.

Participants are welcome to pre-download the app in anticipation of the conference, and we will share logins with you about 2 weeks out so they can research their legislators and bills. They will not be able to see their meeting schedule until the day before they go to the hill.

***Communicating with AA Staff***

While email is always an option, we’ve added a messaging feature to the web site to ensure no email is ever lost in an inbox or routed to spam folders.

The inbox is on the main page and functions just like a basic email. To send us a message, click on the green arrow in the “Messages” box. To view messages we’ve sent, double click on the messages that appear in your inbox.

The best way to contact AA Staff is to reach out to Kaytee Lozier at 203-770-6439, or to email her at [klozier@advocacyassociates.com](mailto:klozier@advocacyassociates.com).