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To login to your Knowlegis account, please visit: www.cqrollcall.com and select Client Login on the top right of the page. Select Knowlegis. Fill in your account login information.

Client ID: _______________________________
Username: _______________________________
Password: _______________________________

If you would like to automatically log into your Knowlegis account when you return in the future, please check the Remember Me box below the username and password fields.
LEGISLATOR PROFILE PAGE

A legislator’s Profile Page is a comprehensive source for information about a particular legislator. The page includes a biographical profile, contact information, a listing of the legislator’s staff, committees and caucuses, recent press releases, and upcoming town hall meetings. You can also add custom staff, save lobbyist notes and grassroots connections, and apply labels.

You can access the Legislator Profile page by typing the legislator’s last name in the Legislator Search field, located on the top right of the Knowlegis site.
My Agenda is a data search, storage, and management system that allows you to customize the display of Knowlegis content and external content.

TO MANAGE MY AGENDA:

1. Click My Agenda, located on the navigation bar.
2. Click Add Tab.
3. Name the Agenda Page and click Create Agenda Page.
4. Click Add Content.
5. Choose the content item(s) you want to appear on the page and click Add Content.
6. Click Add Content in the middle of the content box to customize the data you want to appear. Click Save.

More than one content box can be created within each tab. Click the X icon to delete content or an entire tab. Click the note pad icon to edit a content box or the name of a tab. Click the green plus icon to add content to a tab. The data inside My Agenda will automatically update itself.
Knowtify E-mail Alerts notify recipients of congressional staff changes, town hall meetings, press releases, committee hearings, bill activity, news or notes. Recipients receive separate alerts, broken down by alert category, delivered daily prior to 5 PM Eastern Time. If no information in your alert category has changed, no alert will be delivered.

**TO CREATE A KNOWTIFY ALERT:**

1. Click Alert Center, located on the navigation bar.
2. Select the alert type and click Create Alert.
3. Fill in an Alert Name, the e-mail address you would like the alert sent to, and your preferred E-mail Type.
4. You can then choose to narrow your search to a single elected official or one of your saved legislator searches.
SEARCHING

CREATING A LEGISLATOR OR STAFF LIST

TO CREATE AND SAVE A LIST:

1. Click Create Legislator or Staff List, located under Communications in the Legislator Relations section of Knowlegis.
2. Choose Federal or State and click Go.
3. Choose your criteria (state, party, etc.) from the dropdown menu.
4. To include staff, click the Staff Option box and select the desired position(s). Click Next Step.
5. Select the specific criteria from the dropdown menu that you would like to use to sort the list (California, Democrat, etc.). Click Next Step.
6. Save the search by clicking Save List. Enter a title and click Submit.

CONVERTING AN ACTIVE LIST TO A STATIC LIST

TO PERMANENTLY CONVERT AN ACTIVE LIST INTO A SAVED LIST:

1. Click Create Legislator or Staff List, located under Communications in the Legislator Relations section of Knowlegis.
2. Click the green arrow icon next to the Active List you want to convert.
3. Click OK in the pop up box.

    Click the notepad icon next to a Static List to include or exclude specific legislators or staff members from a list. Click Update to save your changes.

COMBINING LISTS

TO COMBINE TWO LISTS:

1. Click Go, next to Combine Two Lists.
2. Choose the desired lists from the dropdown menus and the desired combination operation.
3. Include any desired staff. Click Next Step.
4. Save the search by clicking Save List. Enter a title and click Submit.

DOWNLOADING LISTS

TO DOWNLOAD A LIST OF ELECTED OFFICIALS OR STAFF:

1. Click Download Data Files, located under Communications in the Legislator Relations section of Knowlegis.
2. Choose Create a New List, or choose an existing list from the dropdown menu. Click Next.
3. Choose the download format from the dropdown list and agree to the License Agreement.
4. Click Download.
COMPOSING A MESSAGE

TO SEND AN E-MAIL TO CONGRESSIONAL STAFF:

1. Click Create/Send Message to Staff (US Congress), located under Communications in the Legislator Relations section of Knowlegis.

2. Choose Create a New List, or choose an existing list from the dropdown menu. Only existing lists with a staff position(s) included will be listed. Click Next.

3. Choose Plain Text Format Only or HTML and Plain Text Formats Concurrently. The HTML Format provides options similar to those found in a word processing program, such as control of the font and the ability to insert pictures. The Plain Text Format does not.

4. Fill in the From Name, From E-mail, Reply-To E-mail and Delivery Date. Click Set to Current Time to send the message as soon as possible.

5. The Subject field can be personalized by clicking Personalize Subject Line. Selecting Chamber from the dropdown list, for example, will fill in the recipient official’s chamber (either House or Senate). Arrange the Mail Merge tags to appear the way you want them in the subject line.

6. Choose your desired Tracking Options.

7. Write and format your HTML message. To import text, click Paste as Plain Text and then Format. Select from the Mail Merge dropdown list to include personalized terms.

8. Write your Text Only message. This is for users who cannot receive HTML (pictures, links etc.). People who use a BlackBerry need the text-only version of the e-mail in order to read the e-mail you are trying to send.

9. Click Preview.

10. To have a sample of the e-mail sent to your own e-mail address, enter it in the E-mail Preview To: field and click Send.

11. Preview the message content for both the HTML and Text Only versions. Select Sample Recipient and click Next to view the message as it will appear for different recipients. Select Highlight Fields to see how merge tags are being used in your message. Click Edit to go back and make changes.

12. Click Save and Send.
10 STRATEGIES FOR E-MAILING CONGRESSIONAL STAFF

1. **Only E-mail When it’s Relevant to the Staffer.** Timing is everything in congressional e-mail. Send the messages when it’s close to a markup, hearing or vote (within a week).

2. **Include Relevant Data.** Staff scan e-mail looking for the nugget that is important to them—a new policy position taken by your group, data on the impact of a policy on their state, or an anecdote that can demonstrate that policy’s impact on a real person.

3. **Target Judiciously.** Send messages to only those legislative assistants who have jurisdiction over the issue. If it’s really important, cc the legislative director; and if really, really, really important (and could impact the congressman’s election) cc the chief of staff.

4. **Slave Over the Subject Line.** You should spend more time writing the six words in the subject line than in writing the message itself. And, if possible, include the word “Invitation” in the subject line – staff think there might be an offer in the e-mail.

5. **Keep it Short.** Take the time to craft a very short e-mail, no more than two screens long. If you have more information to convey, add a link to your website.

6. **Always Include Links.** Link to additional information to provide more background on the issue, link to downloadable documents that staffer can include in a briefing packet for the congressman, link to your site so that the staffer can confirm your credibility or power.

7. **Send HTML and Text Messages.** You should use a system that sends both kinds of messages for two reasons. First, some staff have their e-mail system set to read only text messages. Second, many will read the message on their BlackBerries, and an HTML-only message will clutter the top of the message with unreadable computer code. (FYI: the Knowlegis suite has this capability.)

8. **Do NOT Send Attachments.** If you use Outlook or other desktop e-mail systems to send an e-mail with an attachment to 100 Tax LA’s in the Senate, most will not receive the message. The Senate computer filters will think that an identical e-mail with an attachment is likely a virus. Use a system that uploads the attachment to a secure server or to your own website. (FYI: the Knowlegis suite has this capability too.)

9. **E-mail to “Thank,” Not Just to “Spank.”** Rarely do folks send a letter or e-mail thanking the congressman for doing something. Be sure to thank your legislators when they have supported your position.

10. **Evaluate Your Efforts.** If you send e-mails regularly to Capitol Hill, you can evaluate what works and make adjustments. What words or issues in the headline got opened the most? What links got the most click-throughs? Was the timing of delivery relevant to open rates and click-throughs? One of the great things about technology is that you have reams of data to analyze and can constantly make adjustments to enhance your effectiveness.
CREATING NEW LOBBYIST NOTES

TO ADD A NOTE ABOUT YOUR ORGANIZATION’S INTERACTIONS WITH A LEGISLATOR:

1. Click Add New Note directly underneath Lobbyist Notes.
2. By default, the current date will automatically be included with the note record. To change the date, click in the Date Occurred field and find the date you prefer in the calendar.
3. Fill in the Subject and Note fields, in addition to any other relevant fields.
4. To save an attachment with the note, click in the Attachment field or click Browse to select a file.
5. Click Add Note when finished.

To view a Lobbyist Note, click the magnifying glass icon to the right of the subject’s name. To edit a note, click the note pad icon; to delete, click the X icon.

Lobbyist Notes can also be created from the main Knowlegis site by clicking Add Lobbyist Interaction with Legislator or Staff, located in the Legislator Relations section. Click Edit/Review Lobbyist Interaction with Legislator or Staff to search for notes based on Keywords, Note Type, Issue Type, and/or Note Category. They can also be accessed through the link on the navigation bar.
CREATING CUSTOM NOTE TYPES

Manage Note, Issue, and Connection Types (located in Admin) allows you to create custom Note and Connection Types, and to create Issue Types. You can also click on one of the Note, Connection or Issue Types listed to see all notes/connections assigned to that type.

TO CREATE A CUSTOM NOTE TYPE:

1. Click Admin on the navigation bar.
2. Click Manage Note, Issue, and Connection Types.
3. Add your custom type in the field.
The Notes Report will recall Lobbyist Notes for each elected official.

**TO CREATE A LOBBYIST NOTES REPORT**

1. Click Lobbyist Communications to Legislator or Staff, located under Reports in the Legislator Relations section of Knowlegis. A link to Reports can also be found on the navigation bar.
2. Select a Start Date and/or End Date, or leave the fields blank to recall everything.
3. Select a Note or Connection Type from the dropdown list.
4. Fill in any Keywords you want to search for.
5. Select an Issue Type from the dropdown list.
6. Select from the dropdown list to specify the way you want the Notes or Users to be sorted, then select Ascending or Descending.
7. Click Go.
1. Click Connect a User directly underneath Connected Users.

2. Search for an existing user by last name, first name or e-mail address for the user.

3. Or add a new user by clicking Add New User.

4. Click the connect link to the far right of the user’s name.

5. Fill in the Connection Type, Subject and Note fields.

6. Click Save.

To view a Grassroots Connection, click the magnifying glass icon to the right of the user’s name. To edit a connection, click the note pad icon; to delete, click the X icon.

Grassroots Connections can also be accessed through the link on the navigation bar, and through the Grassroots Relations section, underneath Meetings/Interactions.
TO CREATE A CUSTOM CONNECTION TYPE

1. Click Admin on the navigation bar.
2. Click Manage Note, Issue, and Connection Types.
3. Add your custom type in the field.
The Notes Report will recall Grassroots Notes for each elected official.

TO CREATE A GRASSROOTS NOTE REPORT

1. Click the Reports tab which is found in the navigation bar. Alternatively, from a Legislator’s profile page scroll down to grassroots and click the blue reports button.
2. Scroll down to the Connected Users Report.
3. Select a Connection Type from the dropdown list.
4. Fill in any Keywords you want to search for.
5. Select from the dropdown list to specify the way you want the Notes or Users to be sorted, then select Ascending or Descending.
6. Click Go.
CREATING AND EDITING EVENTS

TO CREATE AN EVENT:

1. In the Meetings/Interactions section of Grassroots Relations, click Add New Advocacy Day Event.
2. Name the event, select the start and end date, select the officials involved, and click Submit Event Details.

Edit/Review Advocacy Day Event will take you to existing events. Click the magnifying glass icon next to the event you want to review.
CREATING APPOINTMENTS

There are two ways to create appointments. You can enter appointments internally, or allow your advocates to create their own appointments using a web form.

TO CREATE AN APPOINTMENT INTERNALLY:

1. In the Meetings/Interactions section of Grassroots Relations, Click Edit/Review Advocacy Day Event.
2. Click View/Edit Appointments from the event's page.
3. Click Create Appointment, located under New Appointments.
4. Search for an existing person or click New Person to create a new record.
5. Enter the elected official's last name, the date and time, the name of the person with whom the advocate will be meeting, and the meeting location. The elected official's staff and office locations will be listed in dropdown menus to the right.
6. Indicate whether the elected official will be attending and whether the meeting has been confirmed.
7. Click Save.

Note: To go to existing events, click Edit/Review Advocacy Day Event. Click the magnifying glass icon next to the event you want to review.
TO CUSTOMIZE AND USE THE SELF SERVICE APPOINTMENT FORM:

1. In the Meetings/Interactions section of Grassroots Relations, click Edit/Review Advocacy Day Event.
2. Click the magnifying glass icon next to the event you want to view.
3. Click View/Edit Appointments from the Event’s page.
4. Click Customize Self-Service Form, located under new appointments.
5. Customize the text that will appear on the web form and click Submit Form Details.
6. The URL appears below New Appointments.

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<table>
<thead>
<tr>
<th>New Appointments</th>
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<tr>
<td>Scheduled Participants: 0</td>
</tr>
<tr>
<td>Appointments Awaiting Confirmation: 0</td>
</tr>
<tr>
<td>Appointments Confirmed: 0</td>
</tr>
</tbody>
</table>

Create Appointment  Customize Self-Service Form

Self-service appointment URL: [http://sl.capwiz.com/yo-trainingfed/lrm/feedback.it?event=25101&mode=appointment](http://sl.capwiz.com/yo-trainingfed/lrm/feedback.it?event=25101&mode=appointment)```

7. Distribute the Self-Service Form/URL to your advocates/members to collect their appointment information.
TO ADD AN ISSUE QUESTION TO APPEAR ON THE FEEDBACK FORM:

1. In the Meetings/Interactions section of Grassroots Relations, click Edit/Review Advocacy Day Event.
2. Click the magnifying glass icon next to the event you want to view.
3. Click Add Issue Question, located underneath Issue Questions.
4. Fill in the Question, your position, and the Description and click Submit Issue.

TO CUSTOMIZE THE SELF-SERVICE FEEDBACK FORM:

1. Click Customize under Event Feedback.
2. Customize the text that will appear on the web form and click Submit Form Details.
3. The URL appears under Event Feedback and to the right of Feedback Form.

TO DOWNLOAD CUSTOM APPOINTMENT-FEEDBACK FORMS FOR THE USE OF YOUR ADVOCATES:

1. Click View/Edit Appointments, located under Appointments.
2. Click Download Appointment-Feedback Forms.
FEEDBACK AND REPORTS

There are two ways to enter feedback. You can enter feedback internally (after receiving completed feedback forms) or you can allow your advocates to enter feedback themselves, using the Feedback Form URL, located under Event Feedback.

TO MANUALLY ENTER FEEDBACK:

1. In the Meetings/Interactions section of Grassroots Relations, click Edit/Review Advocacy Day Event.
2. Click the magnifying glass icon next to the event you want to view.
3. Click Enter Feedback, located under Event Feedback.
4. Click the clipboard icon to the right of the scheduled appointment.
5. Proceed to fill out the feedback form.

Previously approved or rejected feedback can be edited by clicking View/Edit.

TO REVIEW NEW FEEDBACK:

1. Click View/Approve, located under Event Feedback.
2. Click the note pad icon to the right of the scheduled appointment.
3. Click Approve, Reject or Save Only.

Approved feedback will be added as a new Grassroots Connection.