

COSAction Overview – iPhone

Intro

COSAction is an app for mobile devices (smartphones and tablets), with a long-term vision of being the pivotal communications and information portal for all COS supporters. It will not replace the COS website or the Dashboard, but it will incorporate many of the features of both, as well as include features only practical with a dedicated platform.

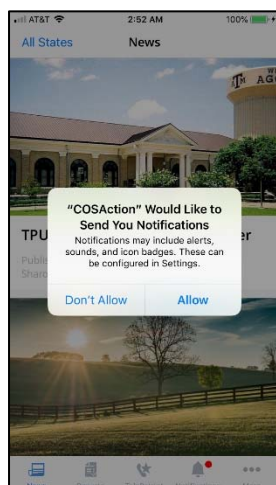
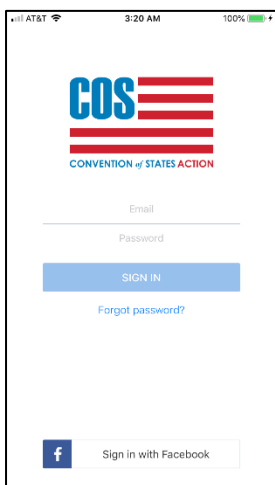
In the Phase 1 release available now, the primary features are TelePatriot and Reports, and it is currently only optimized for smartphones, not tablets. Incremental enhancements will be released for Phase 1, followed by several later phases which will include many more features targeted at leaders, volunteers and supporters.

Following is a list of features currently included in Phase 1:

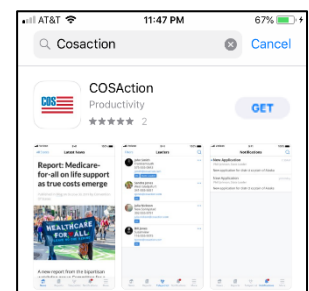
- News – blog posts from the COS website
- Reports – enables Action Reports to be submitted and reviewed
- TelePatriot – tool for reaching a large number of supporters via phone
- Notifications – targeted broadcast messages from CitizenBuilder
- My Profile – similar to the My Profile web page
- Leaders – directory of leaders, similar to the conventionofstates.com/leaders web page

Install and Sign In

Use of COSAction requires a confirmed COS Account, and an assigned role. To install the app, search in the Apple App Store for COSAction, and tap on **Get** to download and install (the app is free). This app requires iOS version 11.0 or later.



1. Locate and tap on the app icon on the Home screen to open the app.



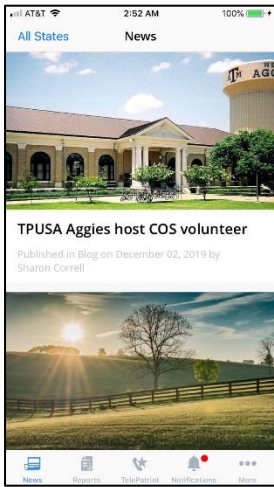
2. Sign in using your CitizenBuilder email/password, or Facebook.

3. For first sign in, tap on **Allow** to accept Notifications.

4. Features are selected by tapping on the icons in the menu along the bottom row.

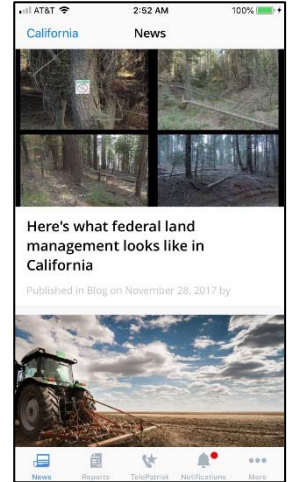
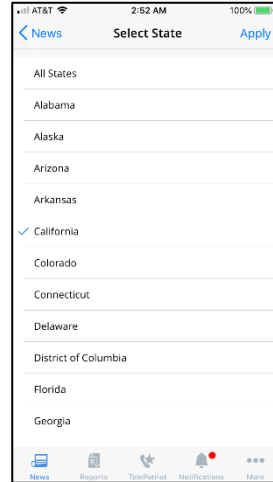
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News



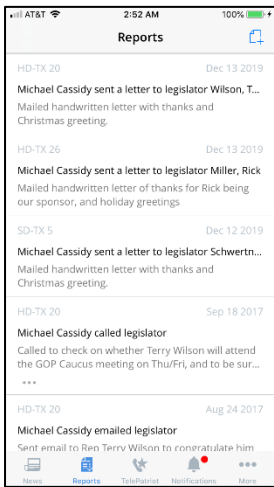
The News feature provides access to COS blog posts from the website, defaulting to *All States*. Posts are displayed with priority given for those pertaining to your home state and district. The website does this as well, but you must be signed in for posts to be prioritized. Since you will always be signed in when using COSAction, you will automatically see this prioritization.

A specific state may be selected instead by tapping on **All States** in the upper left, which displays a state selection page. Tap on the desired state, then **Apply**, to present content specific to that state.




Tapping on any article will open the blog post in the default browser.

Reports



Action Reports are used to document your interactions with legislators, and other COS events and activities you have attended or hosted. This feature is essentially the same as what is available in Patriot Games. When a report is submitted, it becomes visible in LMS. This is especially useful for legislator contacts, as the state leaders can keep up to date on what the legislators are telling constituents about their COS position.

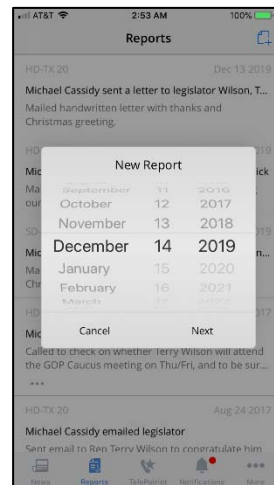
The Reports screen displays all of your previously-submitted reports, including those submitted from other sources, such as Patriot Games, with the most recent shown at the top.

To submit a new report, tap on the *add* icon  in the upper-right, which first displays a date selector, to specify the date of the action, which may not necessarily be the current date. You may submit reports from previous dates which did not get

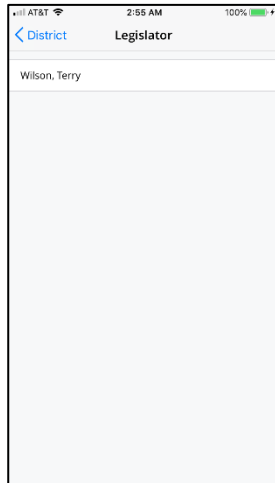
reported earlier. Tapping **Next** displays the list of action types.

Many of the action types do not directly involve a legislator, but you may always optionally specify a related state and district. For a COS Event for example, it may be held to support a specific district.

When a legislator action is tapped, you will be required to identify the legislator by state and district. Some districts may have more than one legislator, so all will be shown to allow selection of the desired legislator.



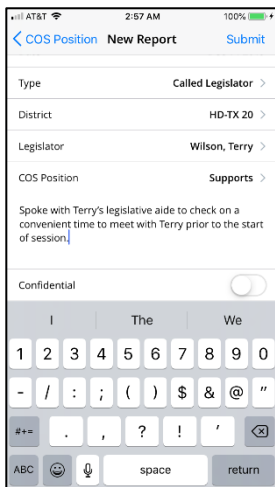
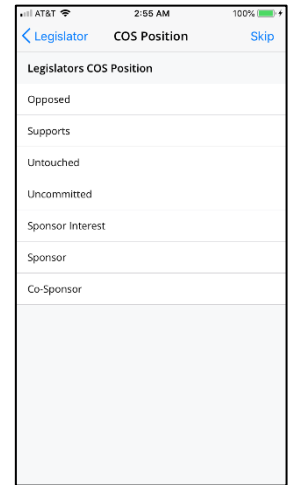
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After tapping on the appropriate legislator, The *COS Position* screen is presented, showing the available options. This does **not** update the legislator's COS Position in LMS, but rather just offers your assessment of the legislator's position at the time of the report. It is very helpful to tap on an appropriate option if known, but it is optional, and can be bypassed by tapping **Skip** in the upper-right.

A summary screen for the new report is then presented, which allows any of your previous choices to be edited if desired, by tapping on any of the lines.

This screen is also where you enter an appropriate description of your action in the *Comments* field, and then tap **Submit** when done. The report may be cancelled by returning to the *Type of Action* screen via successive back-arrow taps in the upper-left, and then tapping **Cancel**.



After submitting a new report, it becomes the first report at the top of your *Reports* screen, and is immediately available for review in LMS.

You may edit any of your past reports by swiping to the right, exposing the green edit pencil.



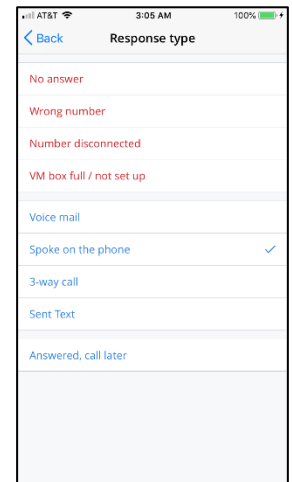
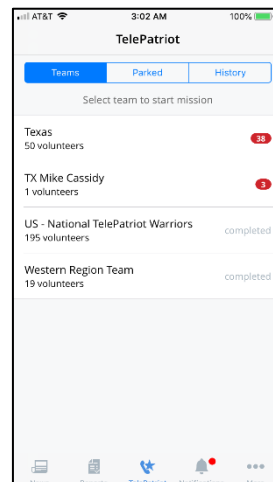
You may also delete a past report by swiping to the left, exposing the red trashcan. Once a report is deleted though, it is gone forever; there is no undelete, so be careful.



TelePatriot

This is a feature designed to enable volunteers to reach a large number of supporters via phone in an efficient manner, and capture feedback from those contacted. The feedback can be in the form of notes that get posted to their profile, as well as optional tags that may be applied to their profile.

This feature is more fully described in a separate *COSAction TelePatriot Basics (iPhone)* document.

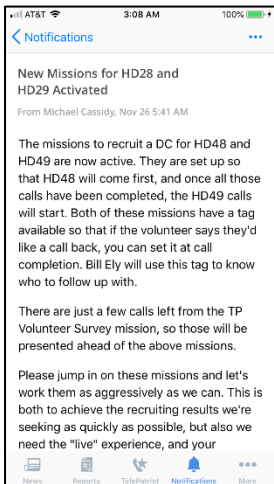
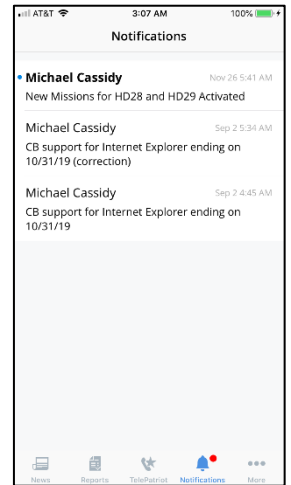


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Notifications

Notifications are broadcast messages delivered from CitizenBuilder to a group of targeted recipients, using the Manage Notifications CB feature. These Notifications are viewable both from the CitizenBuilder Dashboard Inbox, as well as from COSAction.

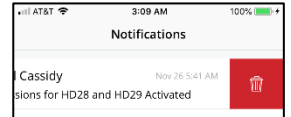
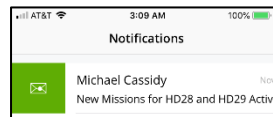
When a new Notification message is delivered to COSAction, the app icon will display a badge showing the number of unread messages, and a red dot is displayed on the Notifications icon on the bottom menu. Unread messages are shown in the message preview list with a blue dot to the left of the bolded name of the sender.



Notification messages could be sent for any number of purposes, but a very useful purpose in Phase 1 of COSAction is to announce new TelePatriot missions, or information pertinent to active or withdrawn missions. The standard Notifications features of iOS are used to determine how you'd like to be alerted when new messages are received. They are managed from the *Settings / Notifications* page, by locating and selecting COSAction from the list of apps.

Tapping on the preview of a message will open a page showing the full message, along with the sender and timestamp. Messages can contain formatted text, including hyperlinks. A message is automatically marked as read when the full message is viewed by tapping from the preview. It may be marked as unread if desired, or deleted, by tapping on the 3-dot icon at the top-right.

Messages may also be marked as unread from the preview list by swiping to the right to expose the green envelope.



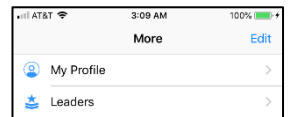
They may also be deleted by swiping to the left to expose the red trashcan.

Other Features

In addition to the above features, each accessible by tapping on the appropriate icon on the menu across the bottom of the screen, other features are available from the secondary menu, accessed by tapping on the 3-dot icon at the far-right of the bottom menu. With Phase 1, there currently are two additional features on this menu:

My Profile

Leaders



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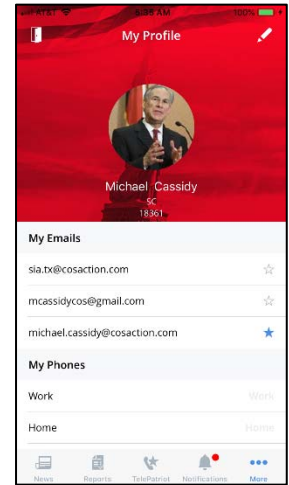
My Profile

This feature provides access to all the same information that is available on the web version of your *My Profile* page. It is in display-only mode initially, but can be edited by tapping on the pencil icon in the upper-right.

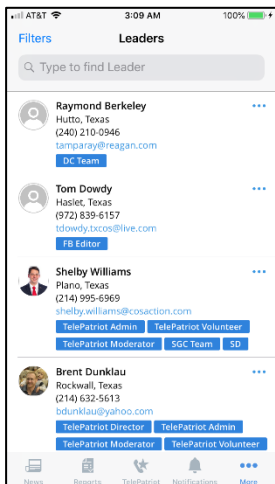
The COSAction app version number is displayed by scrolling to the extreme bottom of the page. This is important information to provide in the event you need to submit a trouble ticket related to COSAction.



The door icon in the upper-left is used to log out, though you'll likely want to stay signed in most of the time.

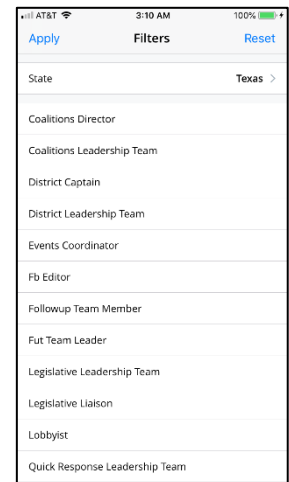
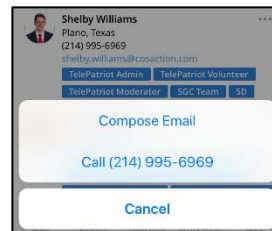


Leaders



The Leaders feature provides access to the Leadership directory for all states, in a similar manner as from the <https://conventionofstates.com/leaders> page. By default it displays leaders from your own home state, but by tapping on **Filters** in the upper-left, you may select specific roles, as well as a different state.

Tapping on the 3-dot icon to the right of a leader's entry displays a pop-up menu enabling you to easily compose an email (inserts the leader's email address as the recipient), or call the person.



There is also a search field at the top where you can search using a person's name.