INTRODUCTION TO ACT!

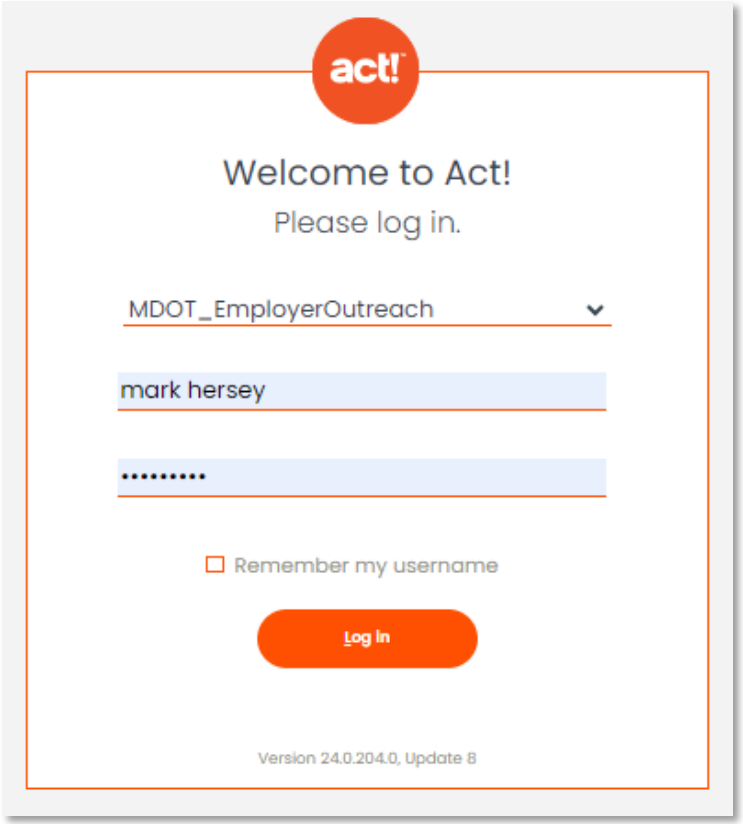
Database input tips and other basic information on how to use the Act! Database for TDM Employer Outreach

Revised October 3, 2024

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Act! Login

- URL: https://act.mwcog.org
- Washington Area Jurisdictions: Select AtMetroWash_Employers
- Maryland jurisdictions OUTSIDE the Washington area: Select “MDOT_EmployerOutreach”
- Enter your username and password



COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Act! Basics

- On the right hand side (see below image) select “Commuter Connections 2022” layout
- Critical information for all employer records includes:
    1. Actual name, a title is not a person
    2. Address, including zip
    3. Employee total
    4. Phone number

COMMUTER CONNECTIONS. | A SMARTER WAY TO WORK

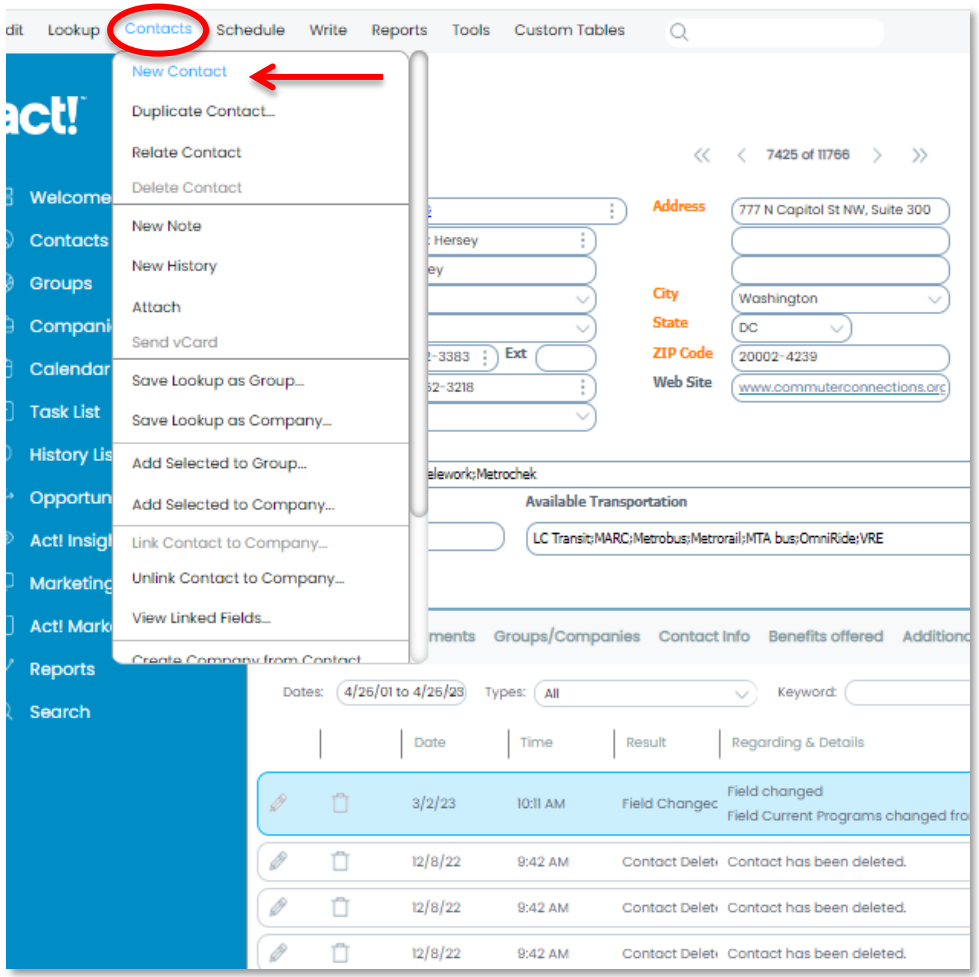
Helpful Information

- Below info will be helpful for establishing and maintaining client relationships:
    1. Website – Helpful for updates (such as address changes)
    2. Email – Extremely helpful for outreach
    3. Current Programs – A snapshot of programs currently in existence at worksite
    4. Jurisdiction – Great for sorting searches
- Listing the primary Employer Outreach sales representative's name and phone number is also helpful for coordination purposes.

COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

New Client Record (1 of 2)

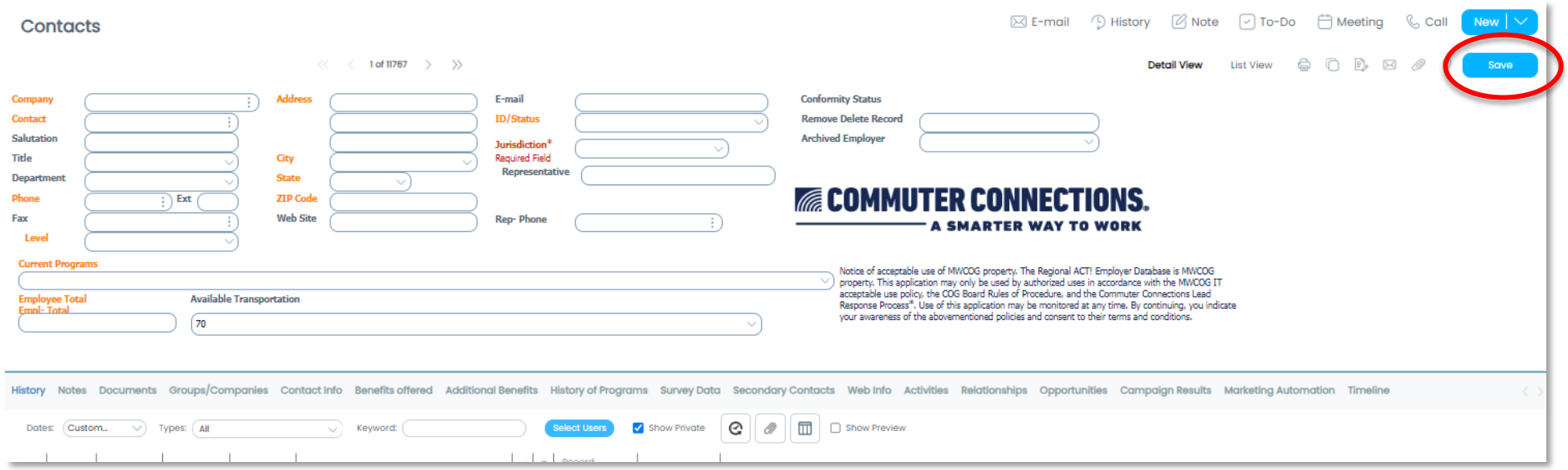
- Select “Contacts” from the main menu and then “New Contact”
- A blank record will popup for data entry (see next slide)



COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

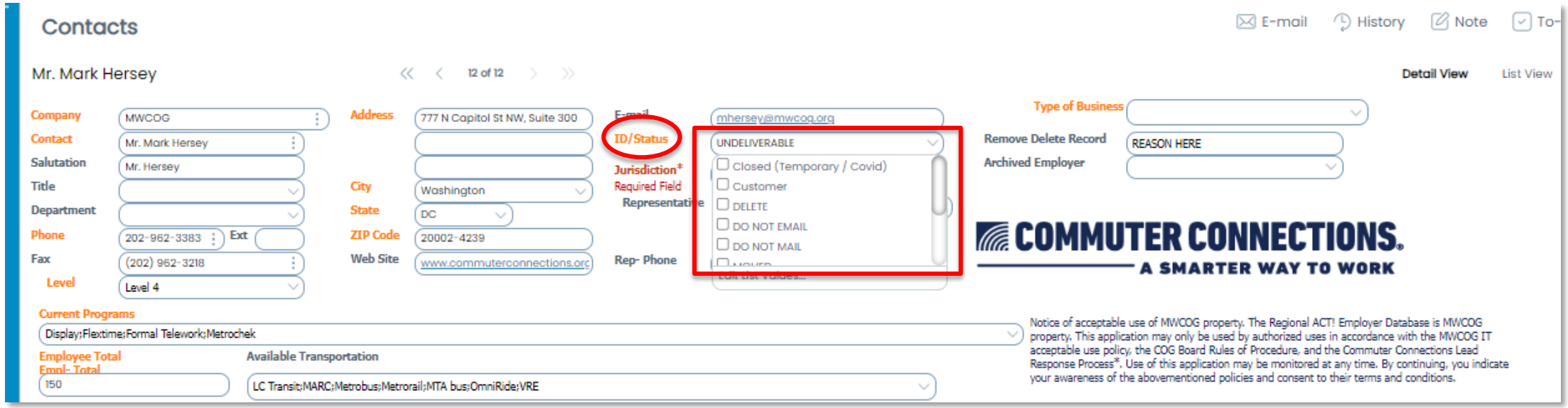
New Client Record (2 of 2)

- Populate the data fields. The jurisdiction field must have data inputted in order for the record to be valid.
- Save the record before exiting.



ID/Status

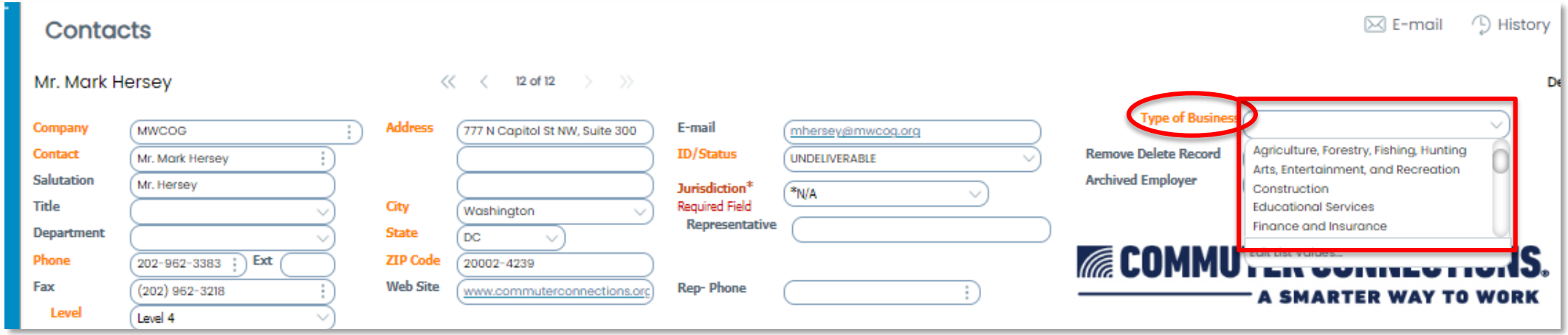
- This drop down is very helpful to determine current relationship with the client
  - Ex: Active, Closed, Delete (if no longer in business), Undeliverable (if mailed items are no longer receivable)



Type of Business

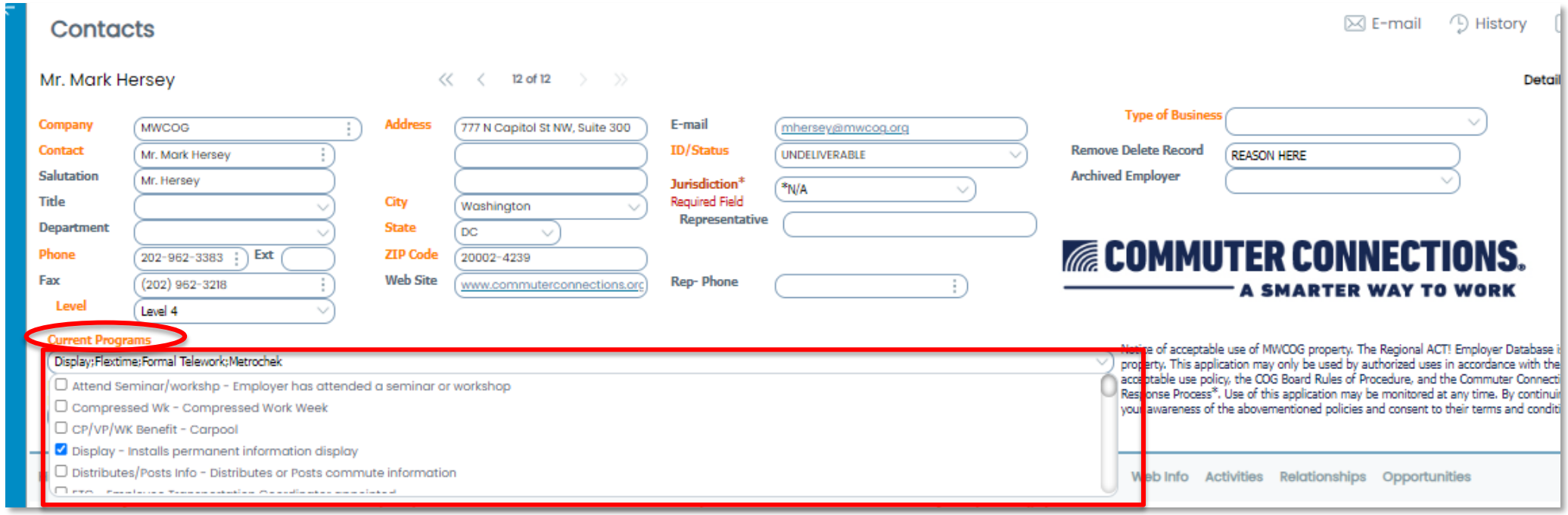
- This drop down is a general category selection. Options include:

- Accommodation and Food Services
- Administrative and Support and Waste Management and Remediation Services
- Agriculture, Forestry, Fishing and Hunting
- Arts, Entertainment, and Recreation
- Construction
- Educational Services
- Finance and Insurance
- Health Care and Social Assistance
- Information
- Management of Companies and Enterprises
- Manufacturing
- Mining, Quarrying, and Oil and Gas Extraction
- Professional, Scientific, and Technical Services
- Public Administration
- Real Estate and Rental and Leasing
- Retail Trade
- Transportation and Warehousing
- Utilities
- Wholesale Trade
- Other Services (except Public Administration)



Current Programs

- Select commuter programs that are offered at the client site. See next slide for pre-populated options.



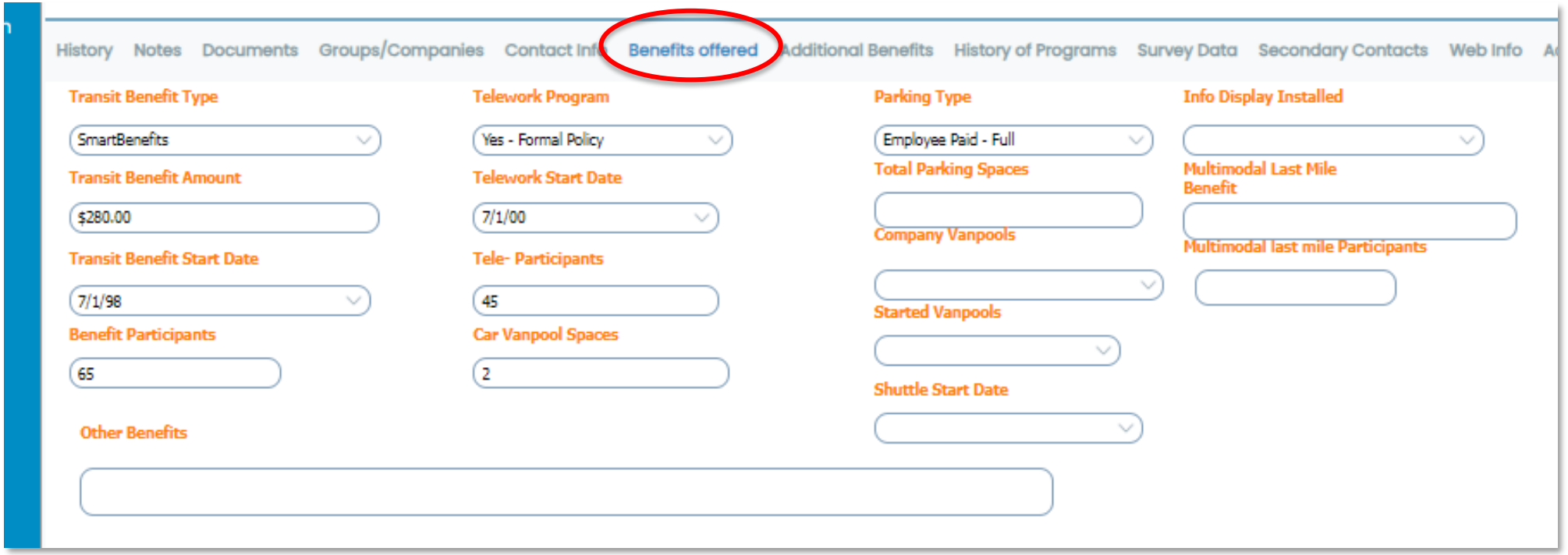
Current Programs – Legacy Listing

- Attend seminar/workshop - employer has attended a seminar or workshop
- Compressed work week
- CP/VP/WK Benefit - Carpool
- Display - installs permanent information display
- Distributes/posts info - distributes or posts commute information
- ETC - Employee Transportation Coordinator appointed
- Fair - Employer held transp. Fair or events
- Fee parking - employer institutes parking fee for SOVs
- Flextime - employer implements a flextime policy
- Formal telework
- Free/reduced parking - reduced fee or free parking for carpools and vanpools
- GRH - employer supplements regional GRH program
- Incentive $ - Employer received funds for commuter program
- Info Contact - Employer requested and receives commute info
- Informal telework - employer allows teleworking
- Meeting - employer met with employer representative
- Metrocheck - Direct Benefits Metrocheck
- OAD-Alert - Employer participates in the ozone action days alert email or fax alert system
- OAD-Comprehensive - employer implements comprehensive Ozone Action Days program
- Other Transit Benefit - transit subsidy other than Metrocheck
- Parking cashout
- Pool Assistance - employer holds pool formation meeting/vp formation
- Pref Parking - Employer offers preferential parking for carpools/vanpools
- Presentation - employer hosted a presentation for employees
- Pretax Metrochek - employee-paid metrocheck
- Racks/Lockers - Bike rack/bike lockers
- RideMatch - employer provided on-site ridematching via Commuter Connections
- Showers
- Shuttle
- Survey - employer conducts commuter survey
- Vanpools - Employer provides or subsidizes vanpools

Current Programs – MDOT Additions

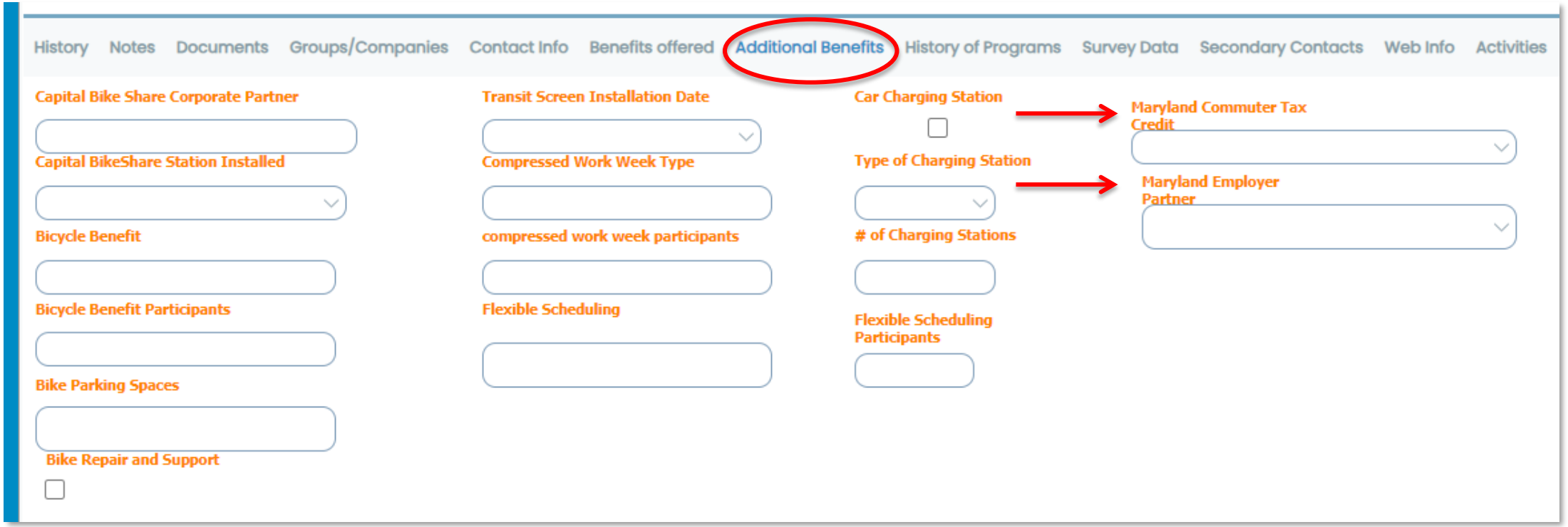
- Bikeshare/scooter share - employer subsidizes membership
- Bike Benefit - employer provides financial incentive for bike commuters
- Walk benefit - employer provides financial incentive for walk/run commuters
- Bike Repair - employer installed bike repair stand/materials
- Locker/change room - employer provides for commuters
- Multimodal Last Mile - employer subsidizes 1-5 mile connection between work and other commute mode
- Telework Subsidy - employer offers pro-rated subsidy for home telework costs and/or telework center membership
- Pre-tax Commuter Parking - employer offers pre-tax option for parking at park-and-ride lots
- Subsidized Commuter Parking - employer subsidizes parking at park-and-ride lots
- Commuter Cash - Employer Rewards participant

Benefits Offered

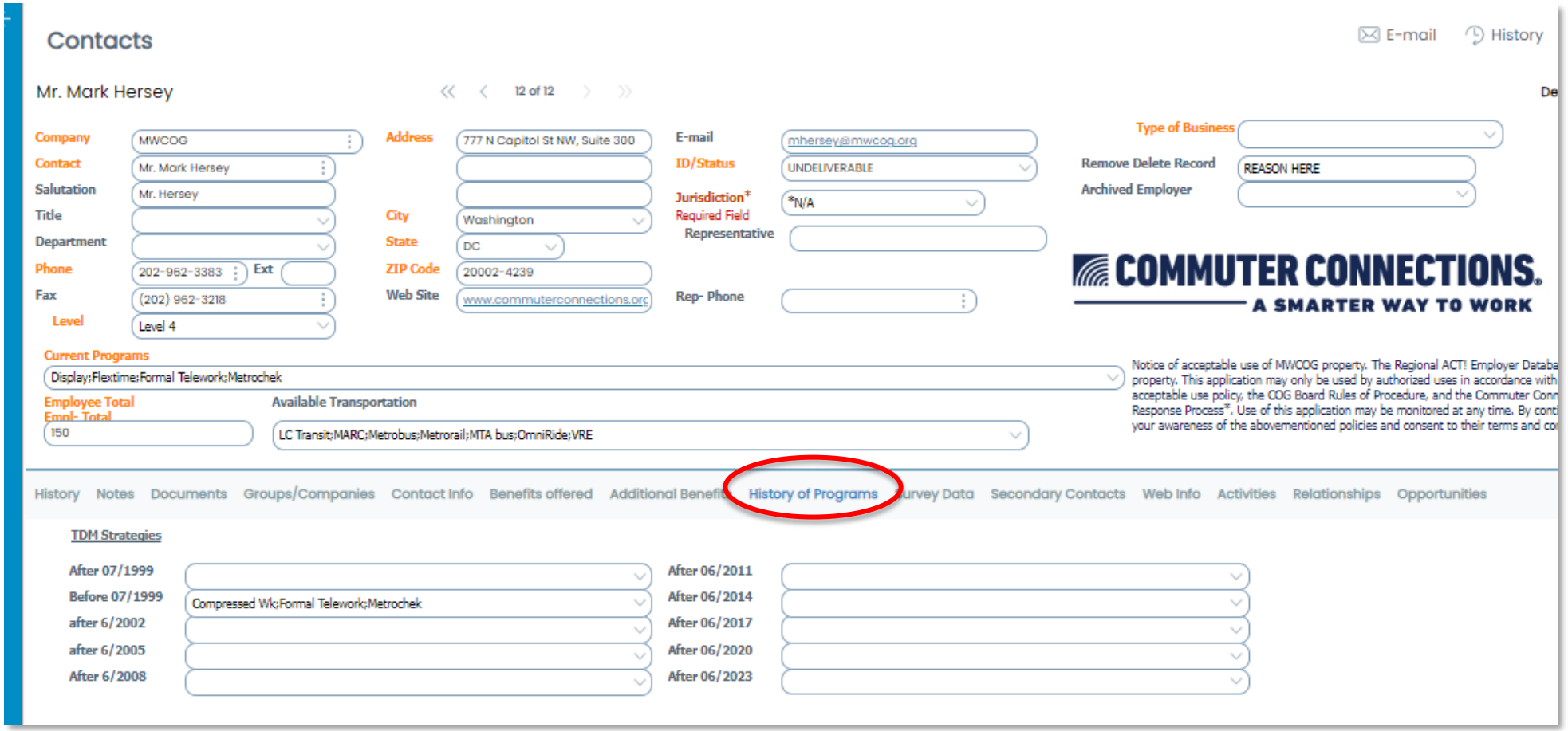


COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Additional Benefits



History of Programs



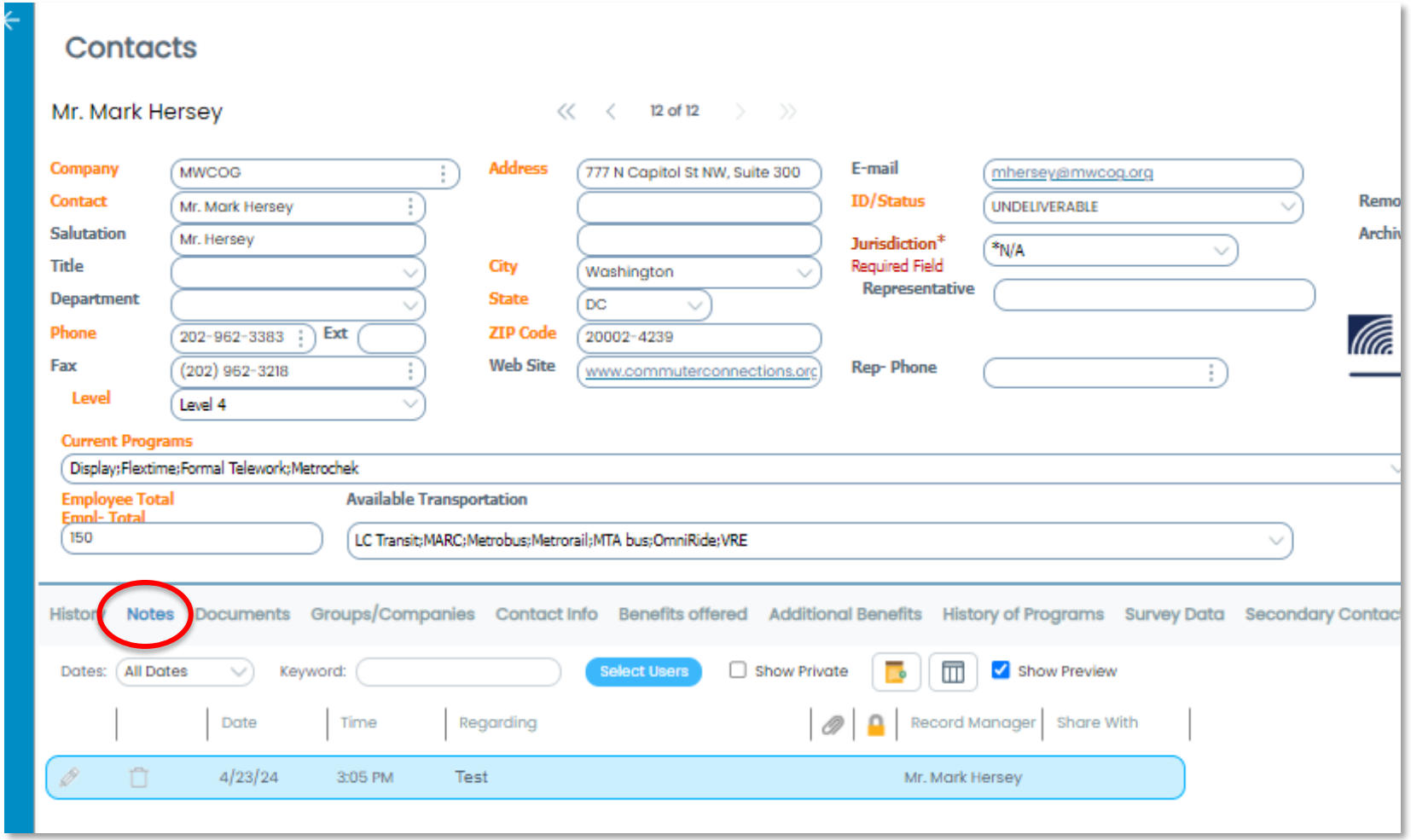
COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Survey Data

- Notable findings from Employer Commuter Surveys can be looped-in to the database.
  - Becomes a repository of results over time.
- Single Occupant Vehicles (SOV) and Average Vehicle Occupancy (AVO)
  - Valuable information for measuring impacts of alternative commutes to the worksite.

COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Notes

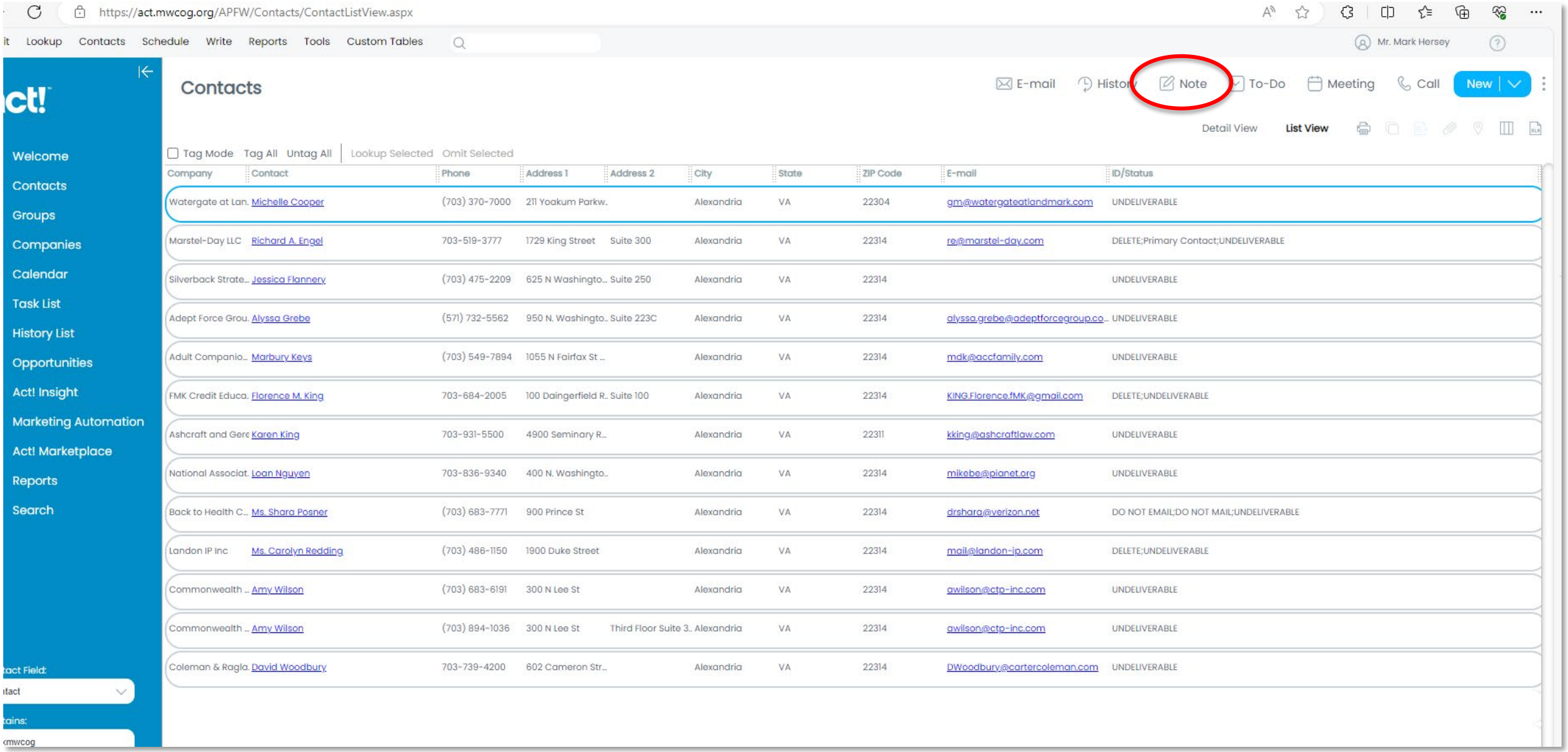


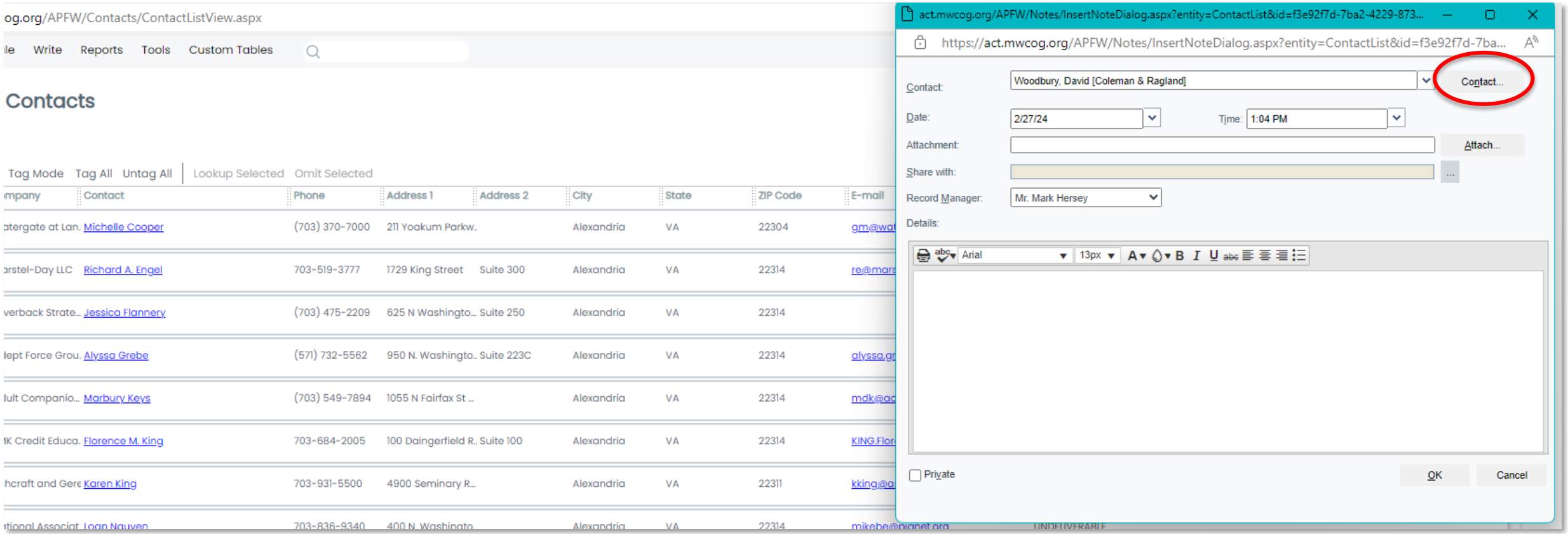
COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

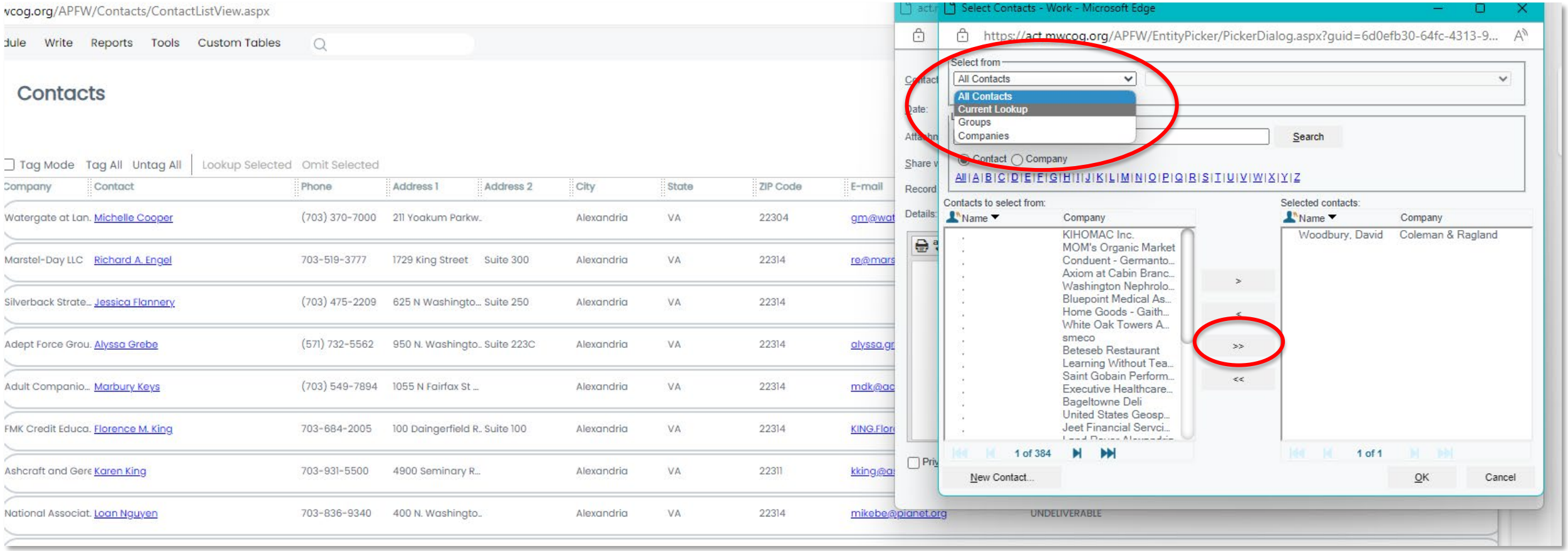
INSERTING NOTES IN ACT!

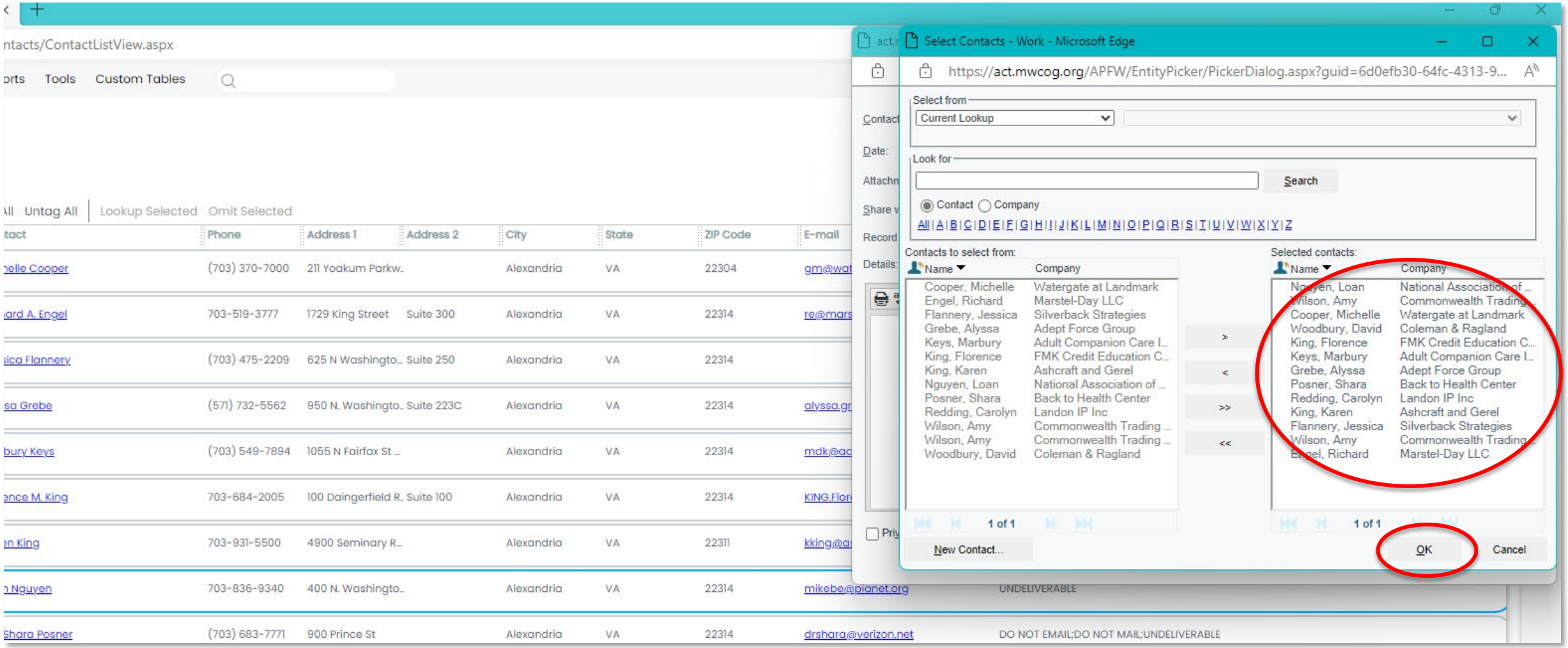
Step-by-step approach to adding notes in Act!

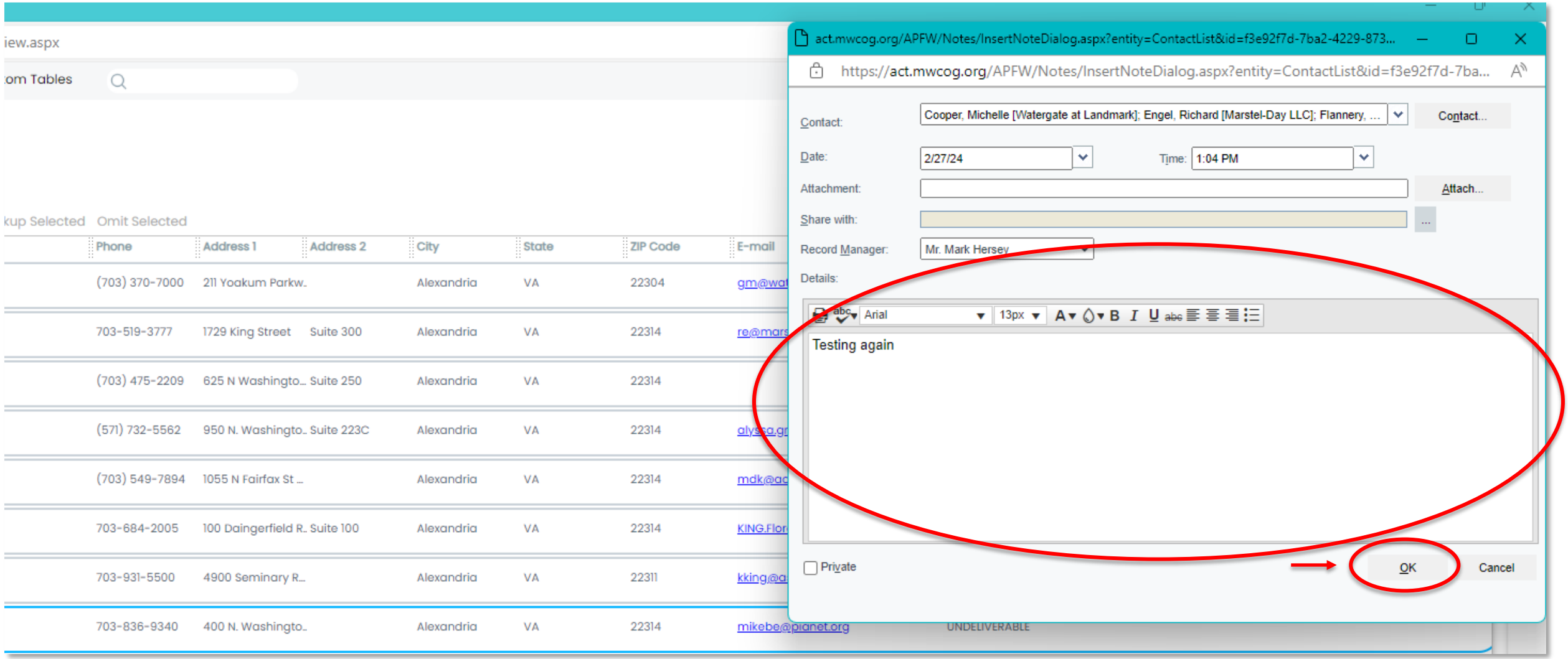
COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK


https://act.mwcog.org/APFW/Contacts/ContactListView.aspx
Lookup Contacts Schedule Write Reports Tools Custom Tables
Mr. Mark Hersey
Contacts
E-mail History Note To-Do Meeting Call New
Detail View List View
Tag Mode Tag All Untag All Lookup Selected Omit Selected
Welcome
Contacts
Groups
Companies
Calendar
Task List
History List
Opportunities
Act! Insight
Marketing Automation
Act! Marketplace
Reports
Search
Company Contact Phone Address 1 Address 2 City State ZIP Code E-mail ID/Status
Watergate at Lan. Michelle Cooper (703) 370-7000 211 Yoakum Parkw.. Alexandria VA 22304 gm@watergateatlandmark.com UNDELIVERABLE
Marstel-Day LLC Richard A. Engel 703-519-3777 1729 King Street Suite 300 Alexandria VA 22314 re@marstel-day.com DELETE;Primary Contact;UNDELIVERABLE
Silverback Strate... Jessica Flannery (703) 475-2209 625 N Washingto... Suite 250 Alexandria VA 22314 UNDELIVERABLE
Adept Force Grou. Alyssa Grebe (571) 732-5562 950 N. Washingto.. Suite 223C Alexandria VA 22314 alyssa.grebe@adeptforcegroup.co... UNDELIVERABLE
Adult Companio... Marbury Keys (703) 549-7894 1055 N Fairfax St ... Alexandria VA 22314 mdk@accfamily.com UNDELIVERABLE
FMK Credit Educa. Florence M. King 703-684-2005 100 Daingerfield R.. Suite 100 Alexandria VA 22314 KING.Florence.fMK@gmail.com DELETE;UNDELIVERABLE
Ashcraft and Gere Karen King 703-931-5500 4900 Seminary R... Alexandria VA 22311 kking@ashcraftlaw.com UNDELIVERABLE
National Associat. Loan Nguyen 703-836-9340 400 N. Washingto.. Alexandria VA 22314 mikebe@pianet.org UNDELIVERABLE
Back to Health C... Ms. Shara Posner (703) 683-7771 900 Prince St Alexandria VA 22314 drshara@verizon.net DO NOT EMAIL;DO NOT MAIL;UNDELIVERABLE
Landon IP Inc Ms. Carolyn Redding (703) 486-1150 1900 Duke Street Alexandria VA 22314 mail@landon-ip.com DELETE;UNDELIVERABLE
Commonwealth ... Amy Wilson (703) 683-6191 300 N Lee St Alexandria VA 22314 awilson@ctp-inc.com UNDELIVERABLE
Commonwealth ... Amy Wilson (703) 894-1036 300 N Lee St Third Floor Suite 3.. Alexandria VA 22314 awilson@ctp-inc.com UNDELIVERABLE
Coleman & Ragla. David Woodbury 703-739-4200 602 Cameron Str... Alexandria VA 22314 DWoodbury@cartercoleman.com UNDELIVERABLE


og.org/APFW/Contacts/ContactListView.aspx
Write
Reports
Tools
Custom Tables
Contacts
Tag Mode
Tag All
Untag All
Lookup Selected
Omit Selected
Company
Contact
Phone
Address 1
Address 2
City
State
ZIP Code
E-mail
atergate at Lan.
Michelle Cooper
(703) 370-7000
211 Yoakum Parkw..
Alexandria
VA
22304
arstel-Day LLC
Richard A. Engel
703-519-3777
1729 King Street
Suite 300
Alexandria
VA
22314
verback Strate...
Jessica Flannery
(703) 475-2209
625 N Washingto...
Suite 250
Alexandria
VA
22314
lept Force Grou.
Alyssa Grebe
(571) 732-5562
950 N. Washingto..
Suite 223C
Alexandria
VA
22314
lult Companio...
Marbury Keys
(703) 549-7894
1055 N Fairfax St ...
Alexandria
VA
22314
IK Credit Educa.
Florence M. King
703-684-2005
100 Daingerfield R..
Suite 100
Alexandria
VA
22314
hcraft and Gere
Karen King
703-931-5500
4900 Seminary R...
Alexandria
VA
22311
tional Associat
Loan Nguyen
703-836-9340
400 N. Washingto
Alexandria
VA
22314
act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba2-4229-873...
https://act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba...
Contact:
Woodbury, David [Coleman & Ragland]
Contact...
Date:
2/27/24
Time:
1:04 PM
Attachment:
Attach...
Share with:
Record Manager:
Mr. Mark Hersey
Details:
Arial
13px
Private
OK
Cancel


wcog.org/APFW/Contacts/ContactListView.aspx
dule Write Reports Tools Custom Tables
Contacts
Tag Mode Tag All Untag All Lookup Selected Omit Selected
Company Contact Phone Address 1 Address 2 City State ZIP Code E-mail
Watergate at Lan. Michelle Cooper (703) 370-7000 211 Yoakum Parkw.. Alexandria VA 22304
Marstel-Day LLC Richard A. Engel 703-519-3777 1729 King Street Suite 300 Alexandria VA 22314
Silverback Strate... Jessica Flannery (703) 475-2209 625 N Washingto... Suite 250 Alexandria VA 22314
Adept Force Grou. Alyssa Grebe (571) 732-5562 950 N. Washingto.. Suite 223C Alexandria VA 22314
Adult Companio... Marbury Keys (703) 549-7894 1055 N Fairfax St ... Alexandria VA 22314
FMK Credit Educa. Florence M. King 703-684-2005 100 Daingerfield R.. Suite 100 Alexandria VA 22314
Ashcraft and Gere Karen King 703-931-5500 4900 Seminary R... Alexandria VA 22311
National Associat. Loan Nguyen 703-836-9340 400 N. Washingto.. Alexandria VA 22314
mikebe@pianet.org
UNDELIVERABLE
Select Contacts - Work - Microsoft Edge
https://act.mwcog.org/APFW/EntityPicker/PickerDialog.aspx?guid=6d0efb30-64fc-4313-9...
Select from
All Contacts
All Contacts
Current Lookup
Groups
Companies
Search
Contact Company
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Contacts to select from:
Name Company
KIHOMAC Inc.
MOM's Organic Market
Conduent - Germanto...
Axiom at Cabin Branc...
Washington Nephrolo...
Bluepoint Medical As...
Home Goods - Gaith...
White Oak Towers A...
smeco
Beteseb Restaurant
Learning Without Tea...
Saint Gobain Perform...
Executive Healthcare...
Bageltowne Deli
United States Geosp...
Jeet Financial Servci...
1 of 384
Selected contacts:
Name Company
Woodbury, David Coleman & Ragland
1 of 1
New Contact...
OK
Cancel


ntacts/ContactListView.aspx
orts Tools Custom Tables
All Untag All | Lookup Selected Omit Selected
Phone Address 1 Address 2 City State ZIP Code E-mail
(703) 370-7000 211 Yoakum Parkw.. Alexandria VA 22304
703-519-3777 1729 King Street Suite 300 Alexandria VA 22314
(703) 475-2209 625 N Washingto... Suite 250 Alexandria VA 22314
(571) 732-5562 950 N. Washingto.. Suite 223C Alexandria VA 22314
(703) 549-7894 1055 N Fairfax St ... Alexandria VA 22314
703-684-2005 100 Daingerfield R.. Suite 100 Alexandria VA 22314
703-931-5500 4900 Seminary R... Alexandria VA 22311
703-836-9340 400 N. Washingto.. Alexandria VA 22314 mikebe@planet.org UNDELIVERABLE
(703) 683-7771 900 Prince St Alexandria VA 22314 drshara@verizon.net DO NOT EMAIL;DO NOT MAIL;UNDELIVERABLE
Select Contacts - Work - Microsoft Edge
https://act.mwcog.org/APFW/EntityPicker/PickerDialog.aspx?guid=6d0efb30-64fc-4313-9...
Select from
Current Lookup
Look for
Search
Contact Company
Contacts to select from:
Name Company
Cooper, Michelle Watergate at Landmark
Engel, Richard Marstel-Day LLC
Flannery, Jessica Silverback Strategies
Grebe, Alyssa Adept Force Group
Keys, Marbury Adult Companion Care I...
King, Florence FMK Credit Education C...
King, Karen Ashcraft and Gerel
Nguyen, Loan National Association of ...
Posner, Shara Back to Health Center
Redding, Carolyn Landon IP Inc
Wilson, Amy Commonwealth Trading ...
Wilson, Amy Commonwealth Trading ...
Woodbury, David Coleman & Ragland
1 of 1
Selected contacts:
Name Company
Nguyen, Loan National Association of ...
Wilson, Amy Commonwealth Trading ...
Cooper, Michelle Watergate at Landmark
Woodbury, David Coleman & Ragland
King, Florence FMK Credit Education C...
Keys, Marbury Adult Companion Care I...
Grebe, Alyssa Adept Force Group
Posner, Shara Back to Health Center
Redding, Carolyn Landon IP Inc
King, Karen Ashcraft and Gerel
Flannery, Jessica Silverback Strategies
Wilson, Amy Commonwealth Trading ...
Engel, Richard Marstel-Day LLC
1 of 1
New Contact...
OK
Cancel


act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba2-4229-873...
https://act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba...
Contact:
Cooper, Michelle [Watergate at Landmark]; Engel, Richard [Marstel-Day LLC]; Flannery, ...
Contact...
Date:
2/27/24
Time:
1:04 PM
Attachment:
Attach...
Share with:
Record Manager:
Mr. Mark Hersey
Details:
Arial
13px
Testing again
Private
OK
Cancel
Phone
Address 1
Address 2
City
State
ZIP Code
E-mail
(703) 370-7000
211 Yoakum Parkw..
Alexandria
VA
22304
703-519-3777
1729 King Street
Suite 300
Alexandria
VA
22314
(703) 475-2209
625 N Washingto...
Suite 250
Alexandria
VA
22314
(571) 732-5562
950 N. Washingto..
Suite 223C
Alexandria
VA
22314
(703) 549-7894
1055 N Fairfax St ...
Alexandria
VA
22314
703-684-2005
100 Daingerfield R..
Suite 100
Alexandria
VA
22314
703-931-5500
4900 Seminary R...
Alexandria
VA
22311
703-836-9340
400 N. Washingto..
Alexandria
VA
22314
mikebe@planet.org
UNDELIVERABLE

RUNNING A REPORT IN ACT!

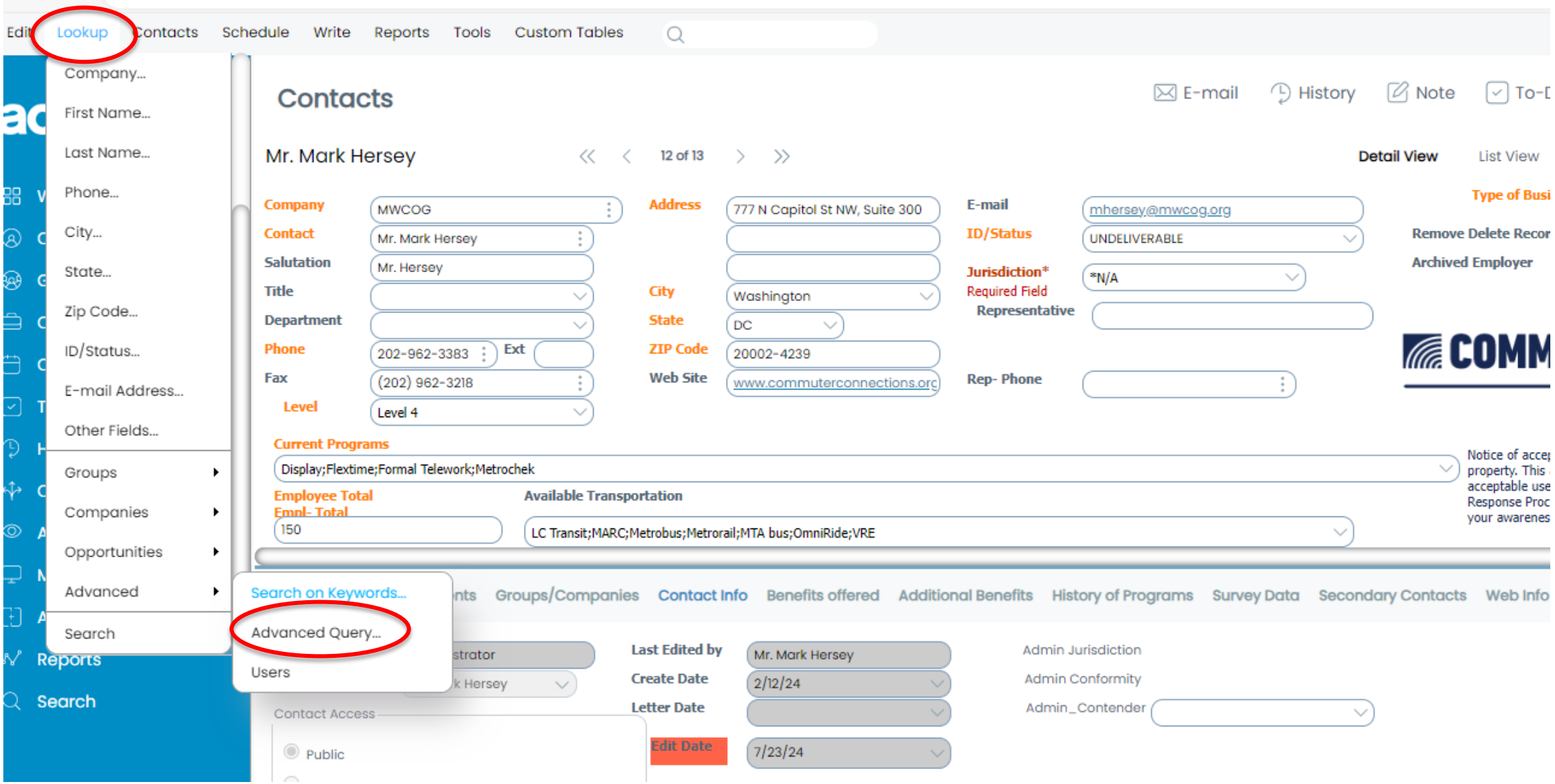
Step-by-step approach to customizing queries and filtering results in Act!

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Preparing Your Dataset

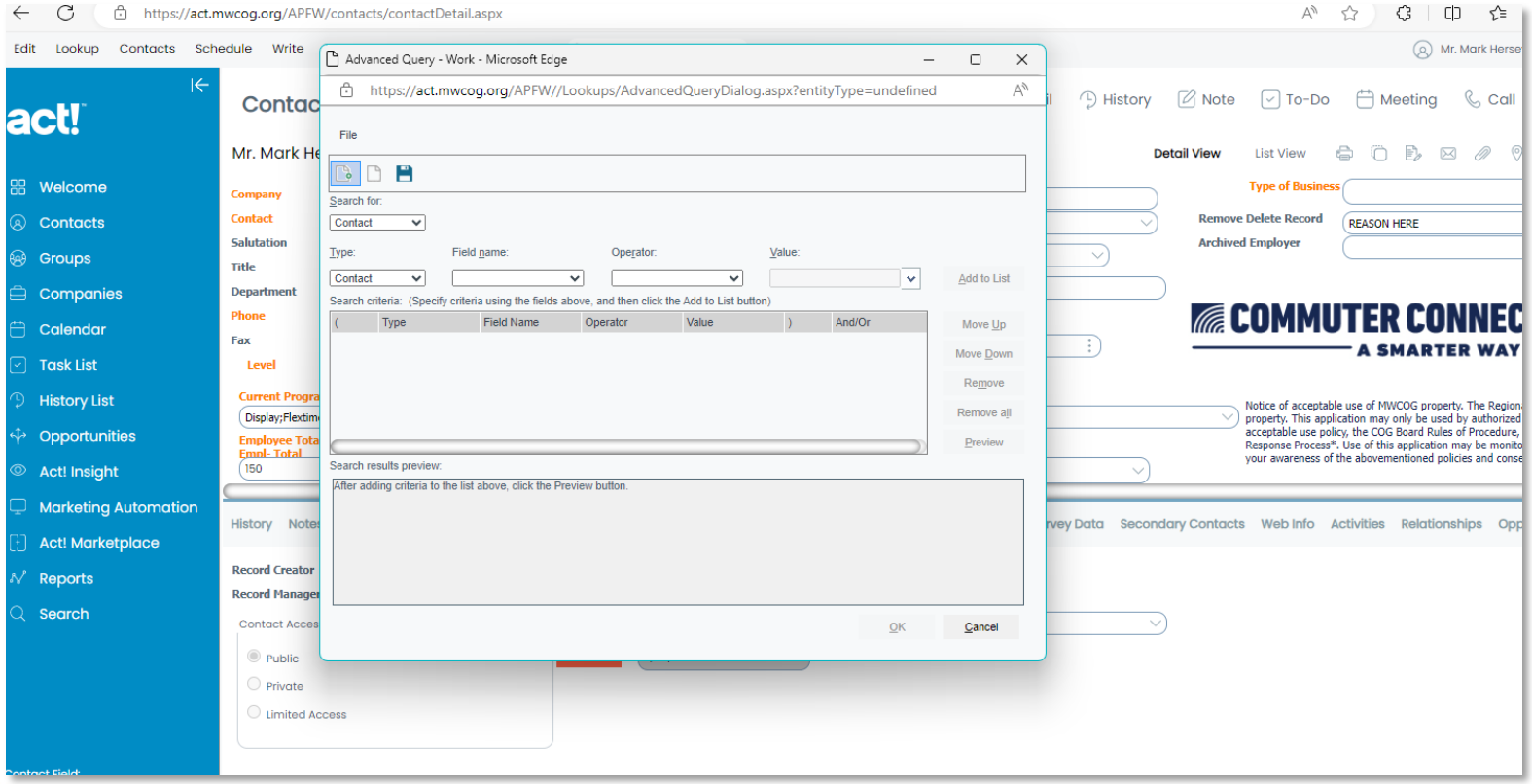
- Run an advanced query
- The results from the query will provide your dataset for the report you want to run
- The predominant report used by the group is the Notes/History
- In the next few slides you will be provided generic report generation guidelines

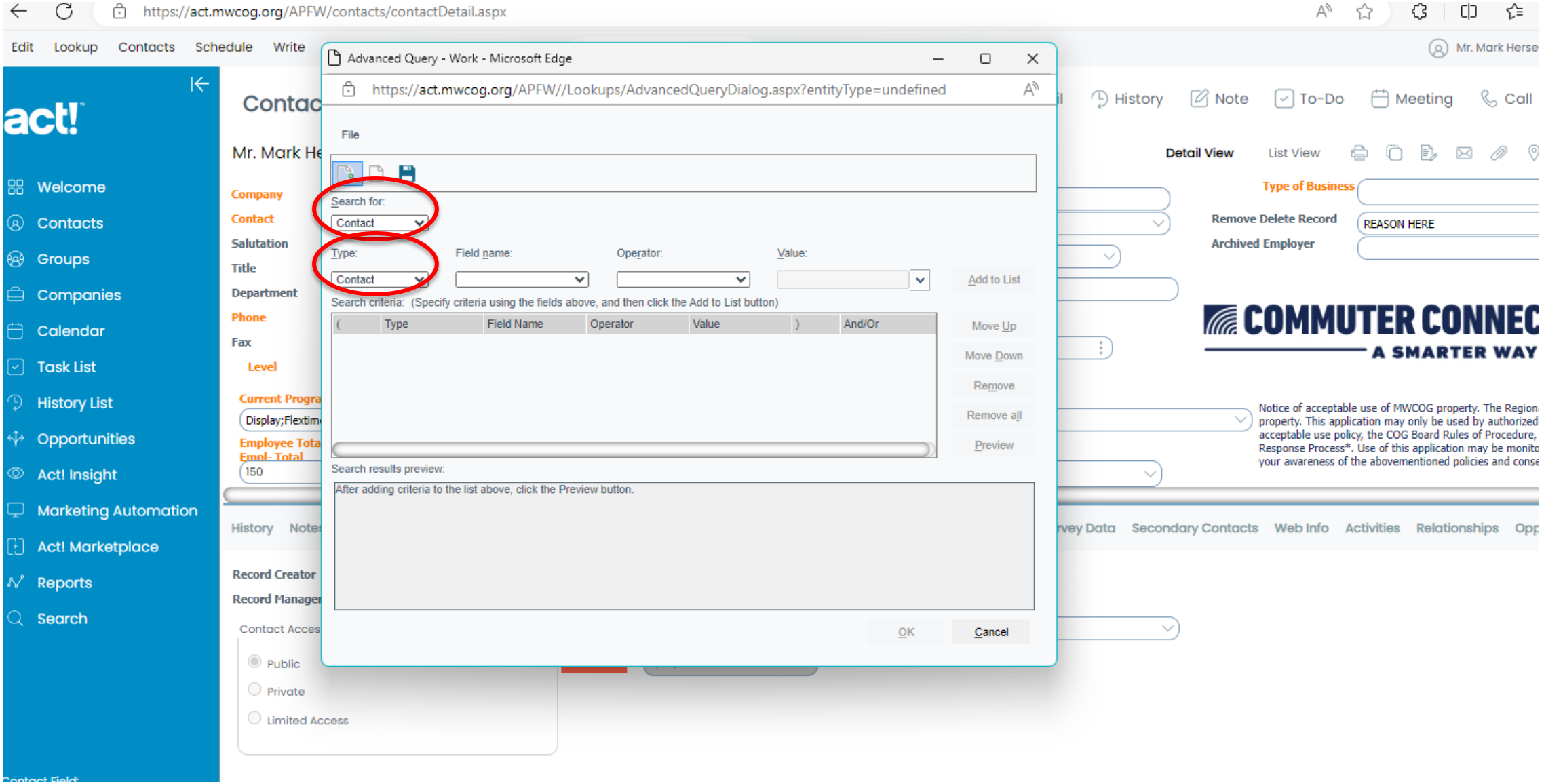
COMMUTER CONNECTIONS | A SMARTER WAY TO WORK


Edit
Lookup
Contacts
Schedule
Write
Reports
Tools
Custom Tables
Company...
First Name...
Last Name...
Phone...
City...
State...
Zip Code...
ID/Status...
E-mail Address...
Other Fields...
Groups
Companies
Opportunities
Advanced
Search
Search on Keywords...
Advanced Query...
Users
Reports
Search
Contacts
E-mail
History
Note
Mr. Mark Hersey
12 of 13
Detail View
List View
Company
MWCOG
Address
777 N Capitol St NW, Suite 300
E-mail
mhersey@mwcog.org
Contact
Mr. Mark Hersey
ID/Status
UNDELIVERABLE
Salutation
Mr. Hersey
Jurisdiction*
*N/A
Title
City
Washington
Required Field
Department
State
DC
Representative
Phone
202-962-3383
Ext
ZIP Code
20002-4239
Fax
(202) 962-3218
Web Site
www.commuterconnections.org
Rep- Phone
Level
Level 4
Type of Busi
Remove Delete Recor
Archived Employer
Current Programs
Display;Flextime;Formal Telework;Metrochek
Employee Total
Empl- Total
150
Available Transportation
LC Transit;MARC;Metrobus;Metrorail;MTA bus;OmniRide;VRE
Groups/Companies
Contact Info
Benefits offered
Additional Benefits
History of Programs
Survey Data
Secondary Contacts
Web Info
Last Edited by
Mr. Mark Hersey
Create Date
2/12/24
Letter Date
Edit Date
7/23/24
Admin Jurisdiction
Admin Conformity
Admin_Contender
Contact Access
Public

Selecting Criteria

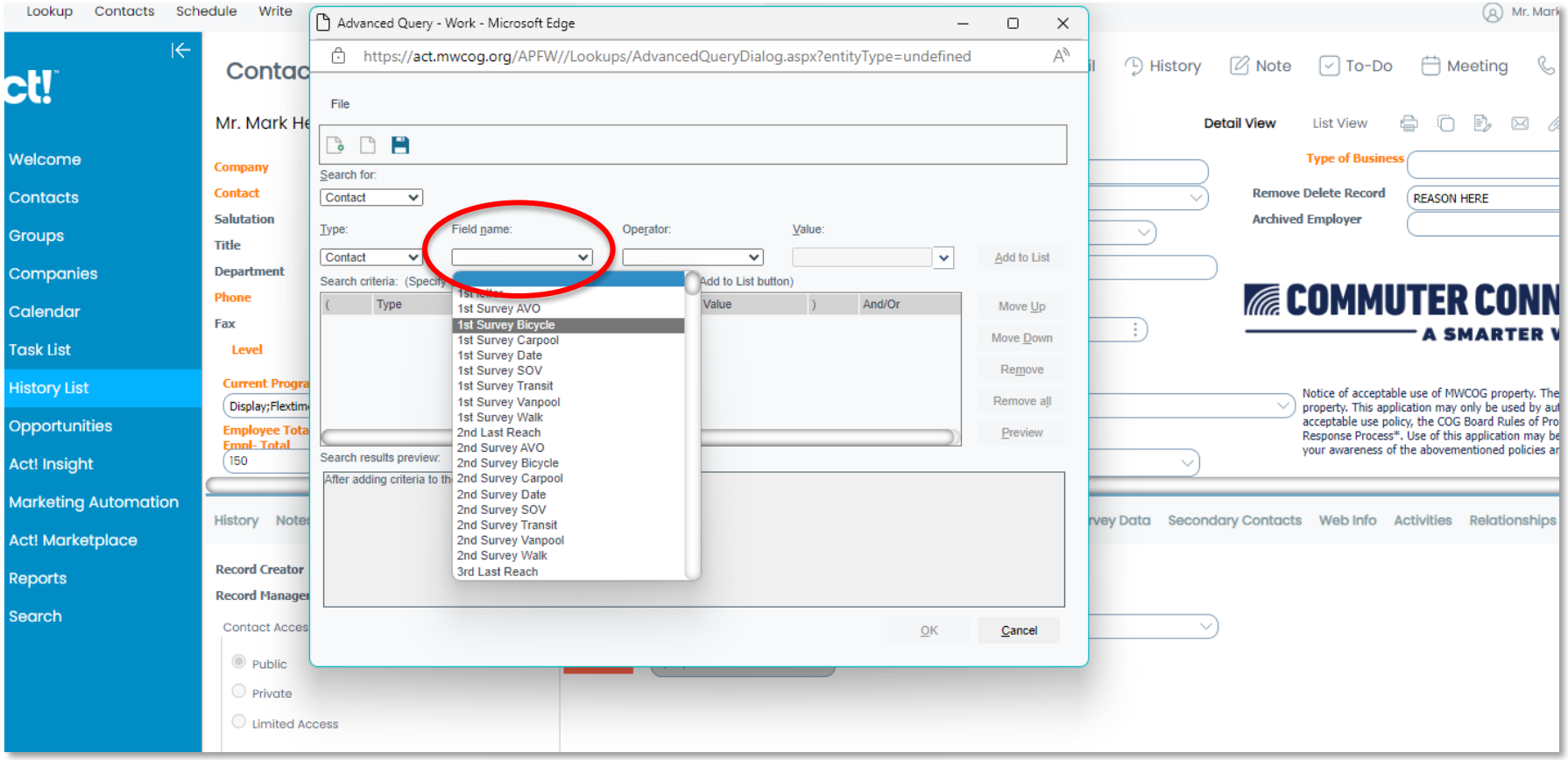
- In the dialogue box you will be able to select your “drill down” criteria
- In the following slide you’ll see what and where you’ll select your directives




https://act.mwcog.org/APFW/contacts/contactDetail.aspx
Edit
Lookup
Contacts
Schedule
Write
Mr. Mark Herse
act!
Welcome
Contacts
Groups
Companies
Calendar
Task List
History List
Opportunities
Act! Insight
Marketing Automation
Act! Marketplace
Reports
Search
Advanced Query - Work - Microsoft Edge
https://act.mwcog.org/APFW//Lookups/AdvancedQueryDialog.aspx?entityType=undefined
File
Search for:
Contact
Type:
Field name:
Operator:
Value:
Contact
Add to List
Search criteria: (Specify criteria using the fields above, and then click the Add to List button)
(Type Field Name Operator Value) And/Or
Move Up
Move Down
Remove
Remove all
Preview
Search results preview:
After adding criteria to the list above, click the Preview button.
OK
Cancel
History
Note
To-Do
Meeting
Call
Detail View
List View
Type of Business
Remove Delete Record
REASON HERE
Archived Employer
COMMUTER CONNEC
A SMARTER WAY
Notice of acceptable use of MWCOG property. The Region
property. This application may only be used by authorized
acceptable use policy, the COG Board Rules of Procedure,
Response Process*. Use of this application may be monito
your awareness of the abovementioned policies and conse
Company
Contact
Salutation
Title
Department
Phone
Fax
Level
Current Progra
Display;Flextim
Employee Tota
Empl- Total
150
History
Notes
Secondary Contacts
Web Info
Activities
Relationships
Record Creator
Record Manager
Contact Acces
Public
Private
Limited Access

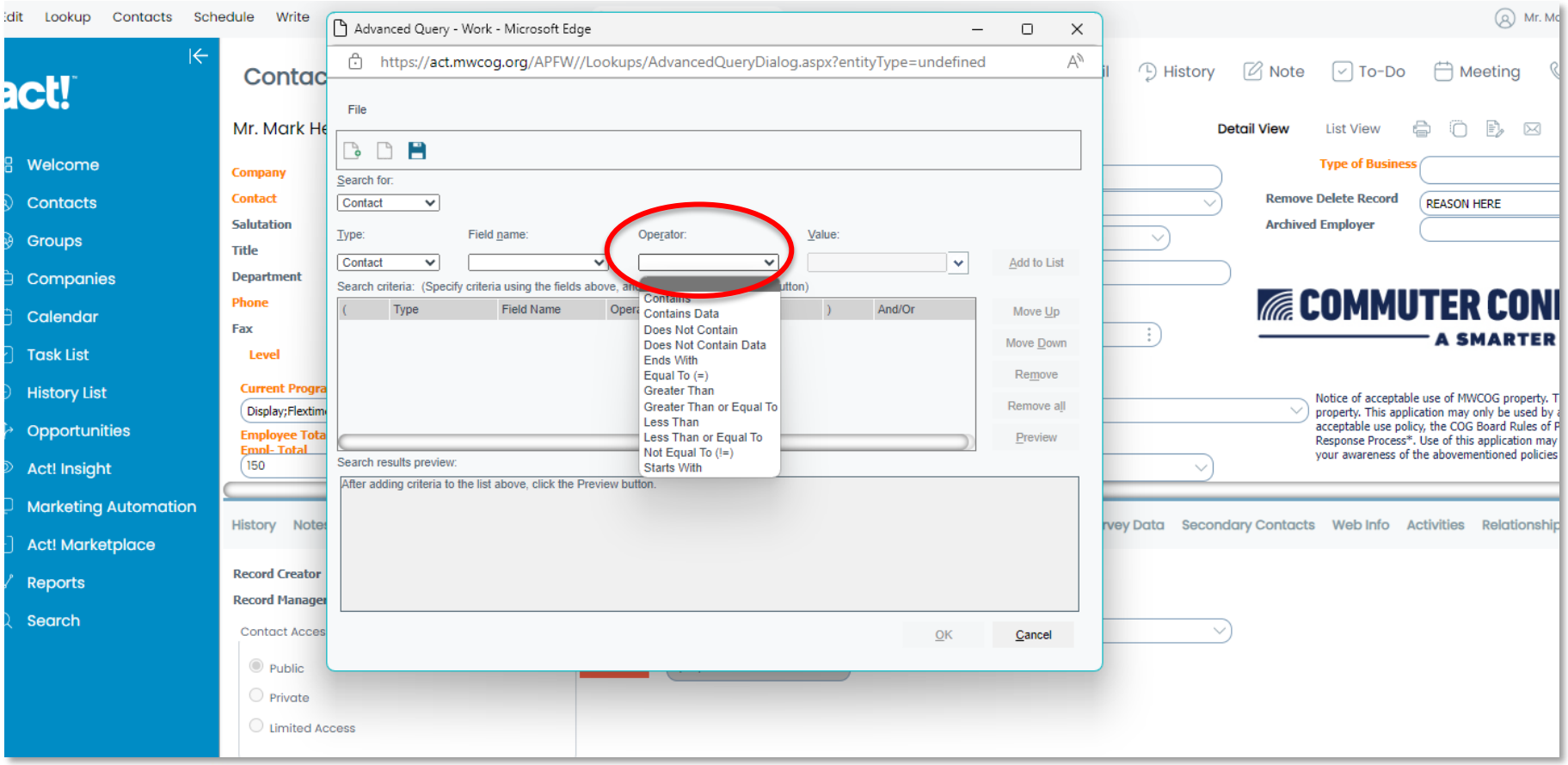
Advanced Query - Fields

- The field name drop down you'll select which field you want to use to search.



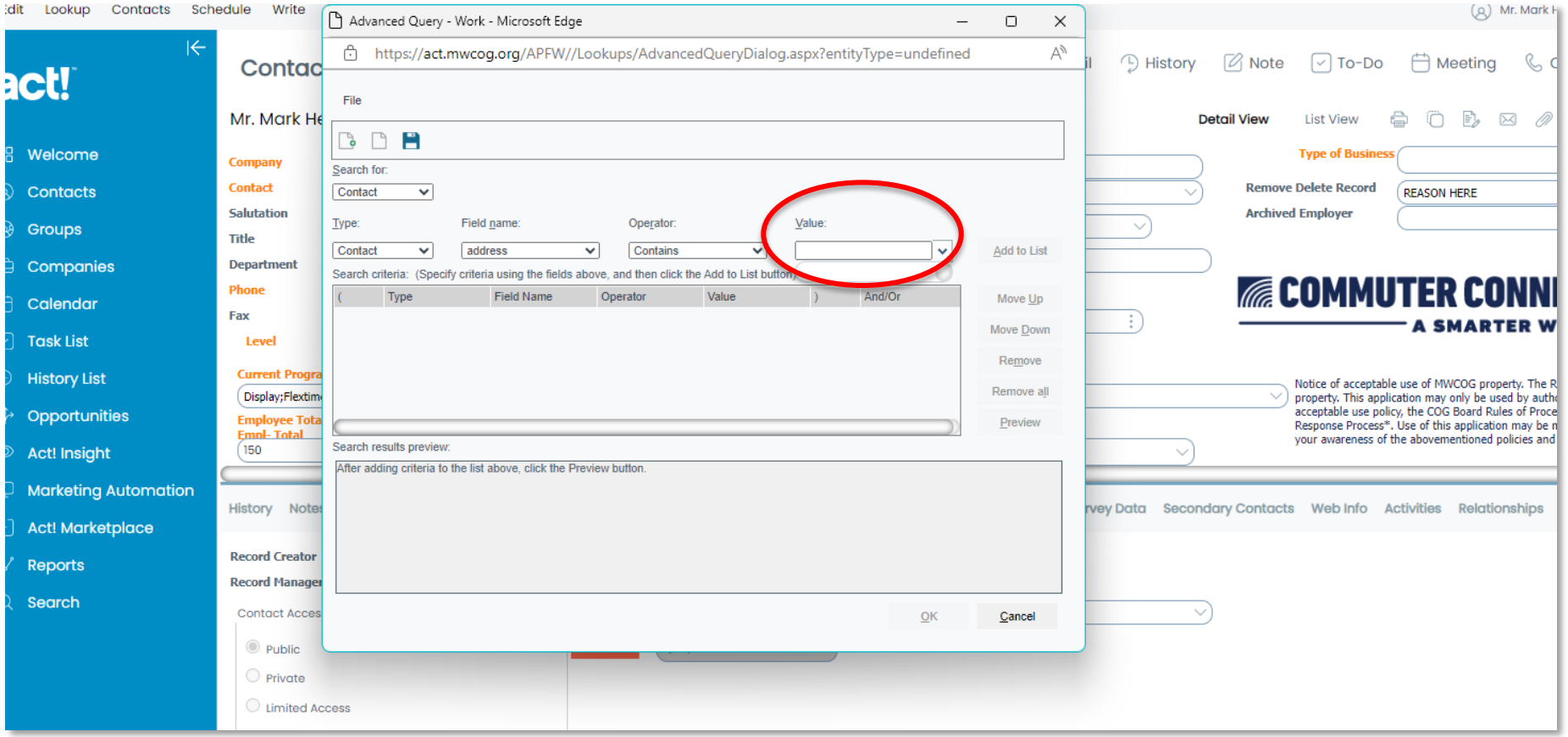
Advanced Query - Operator

- The field name drop down you'll select which field you want to use to search.



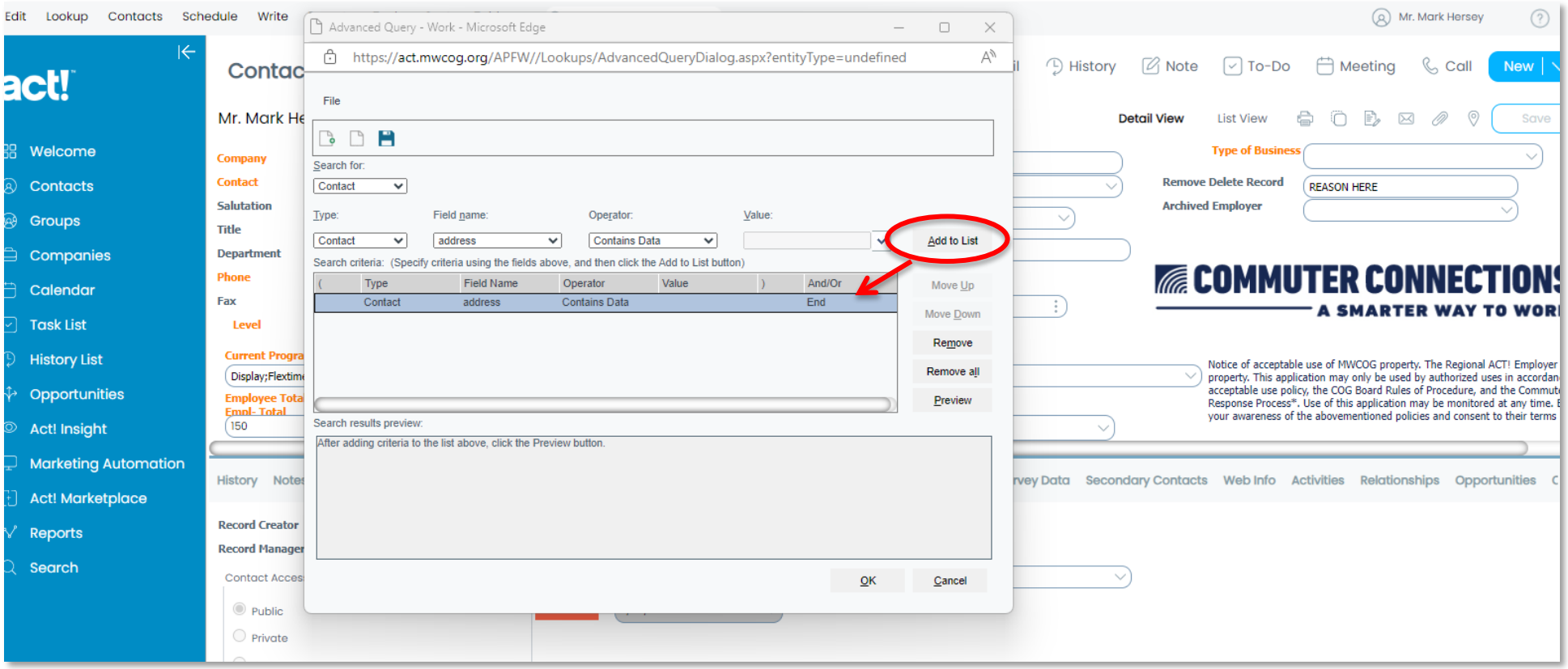
Advanced Query - Value

- The value will determine the characters you want to use



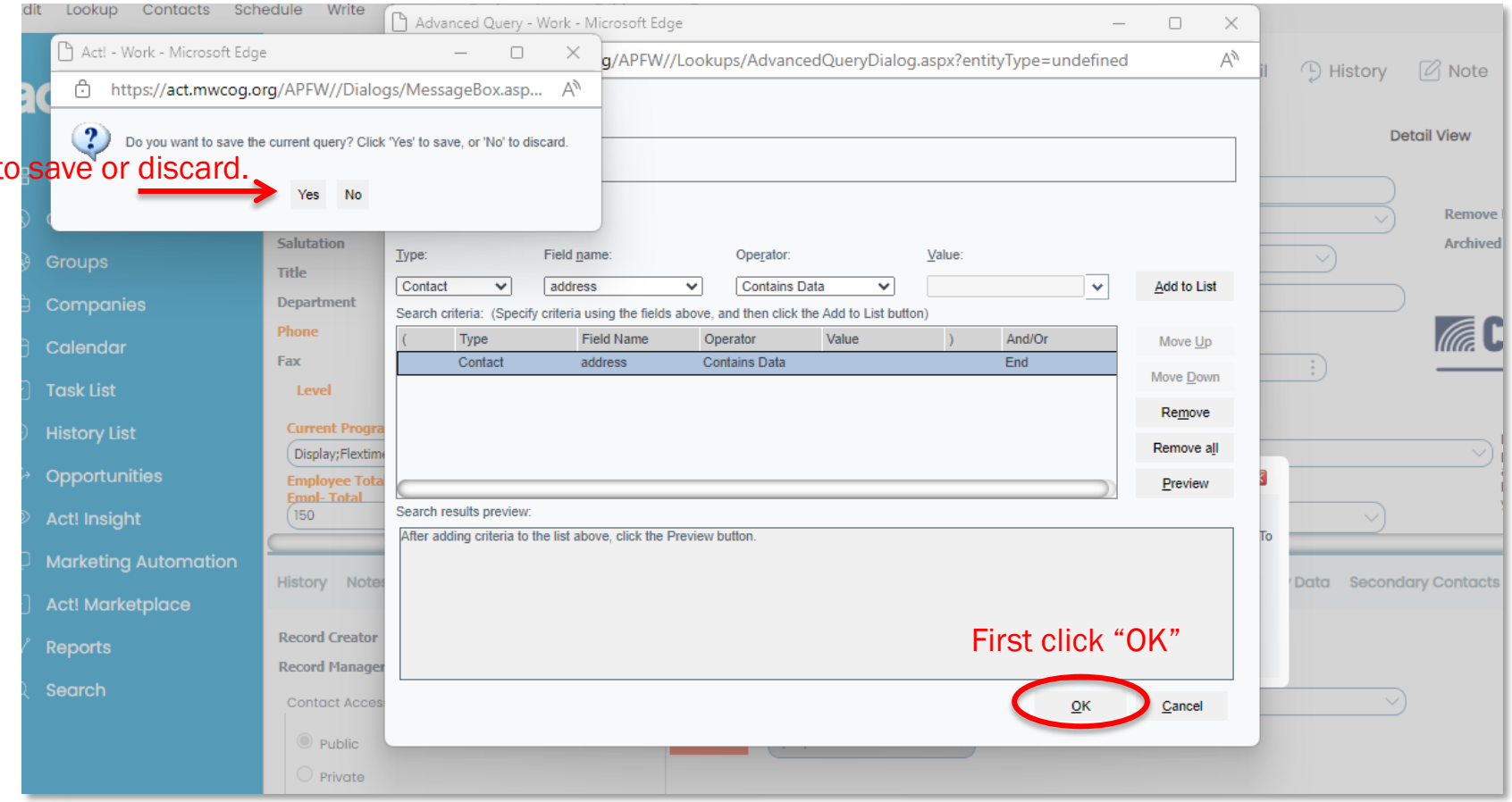
Advanced Query – Creating Your List

- You will now create your search string – click on add to list



Advanced Query – Running Your Query

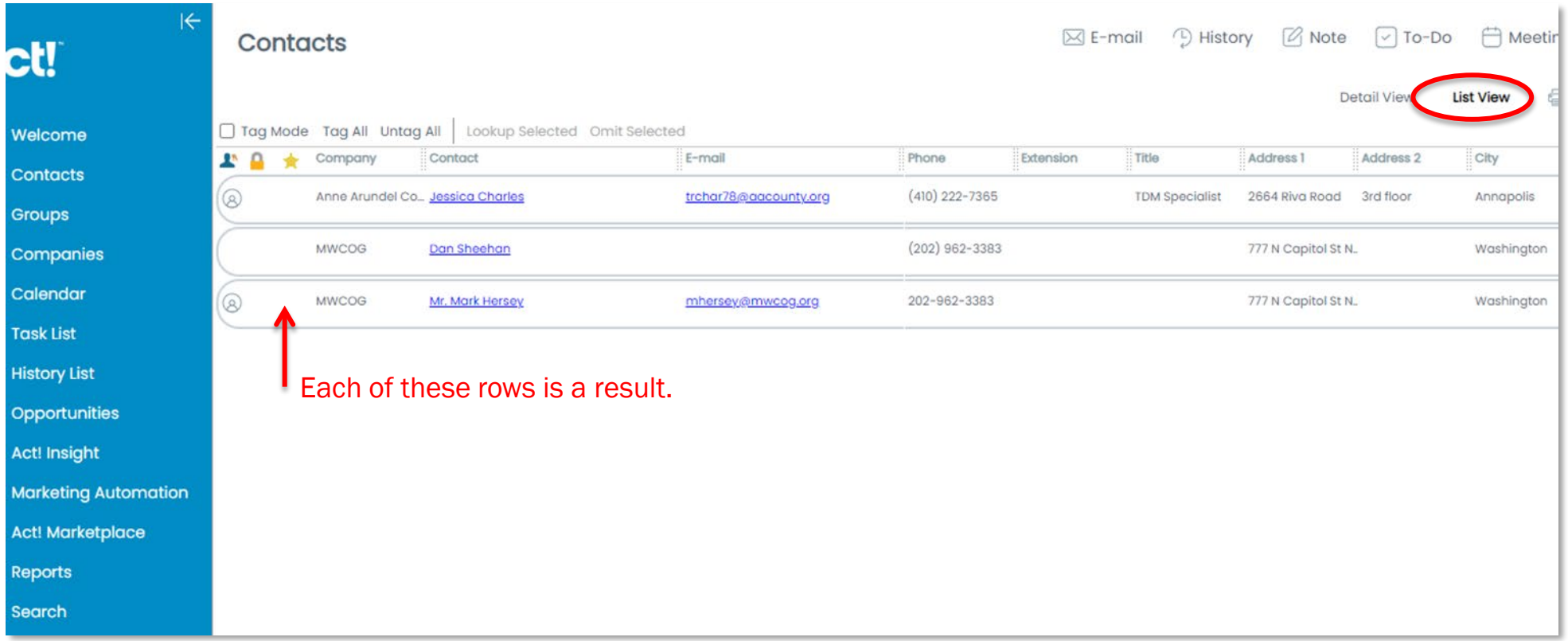
- You'll select the okay option and run the report – you can save the query or not save it



COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Advanced Query – Results

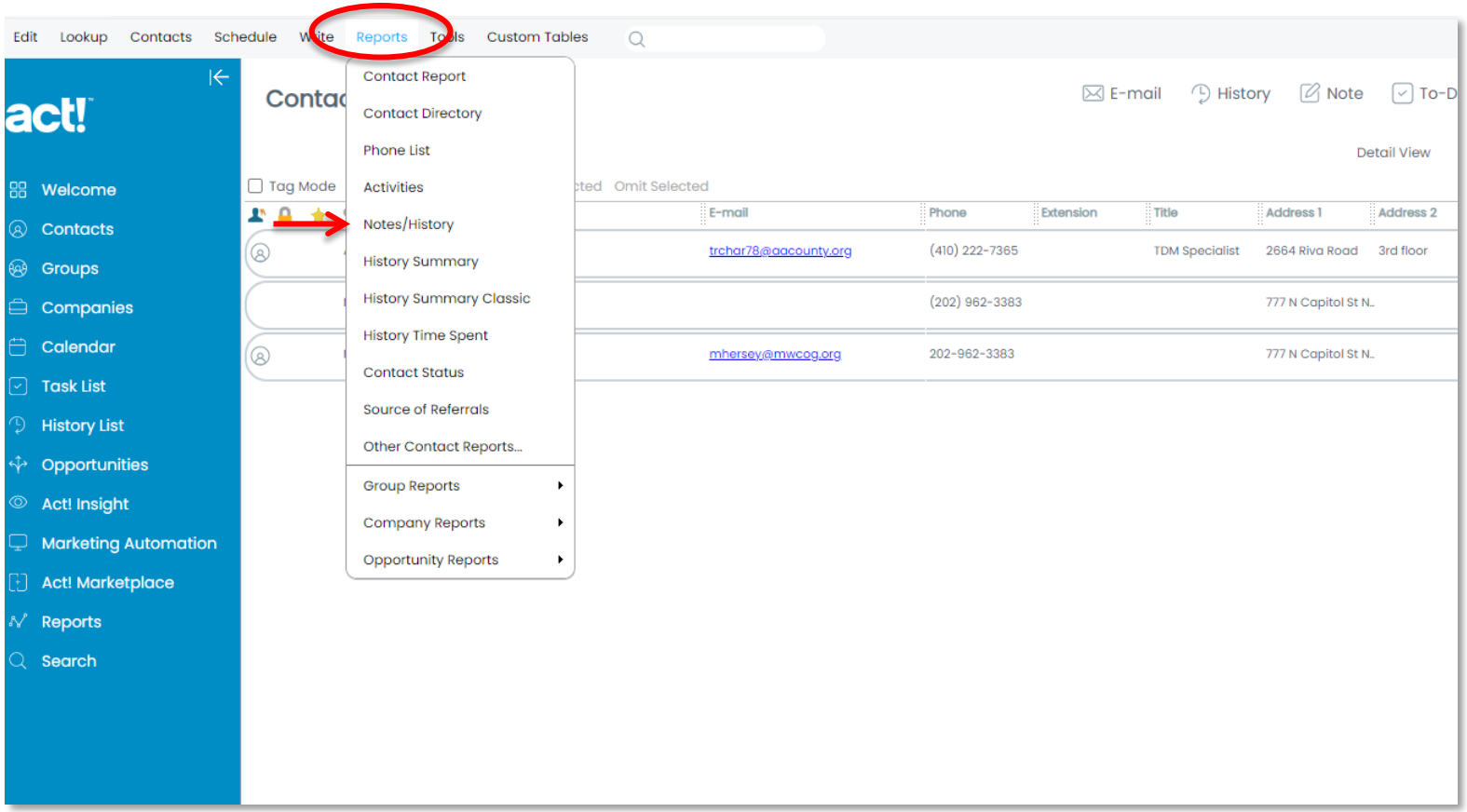
- Your results will appear like this – the list view



COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Running a Report

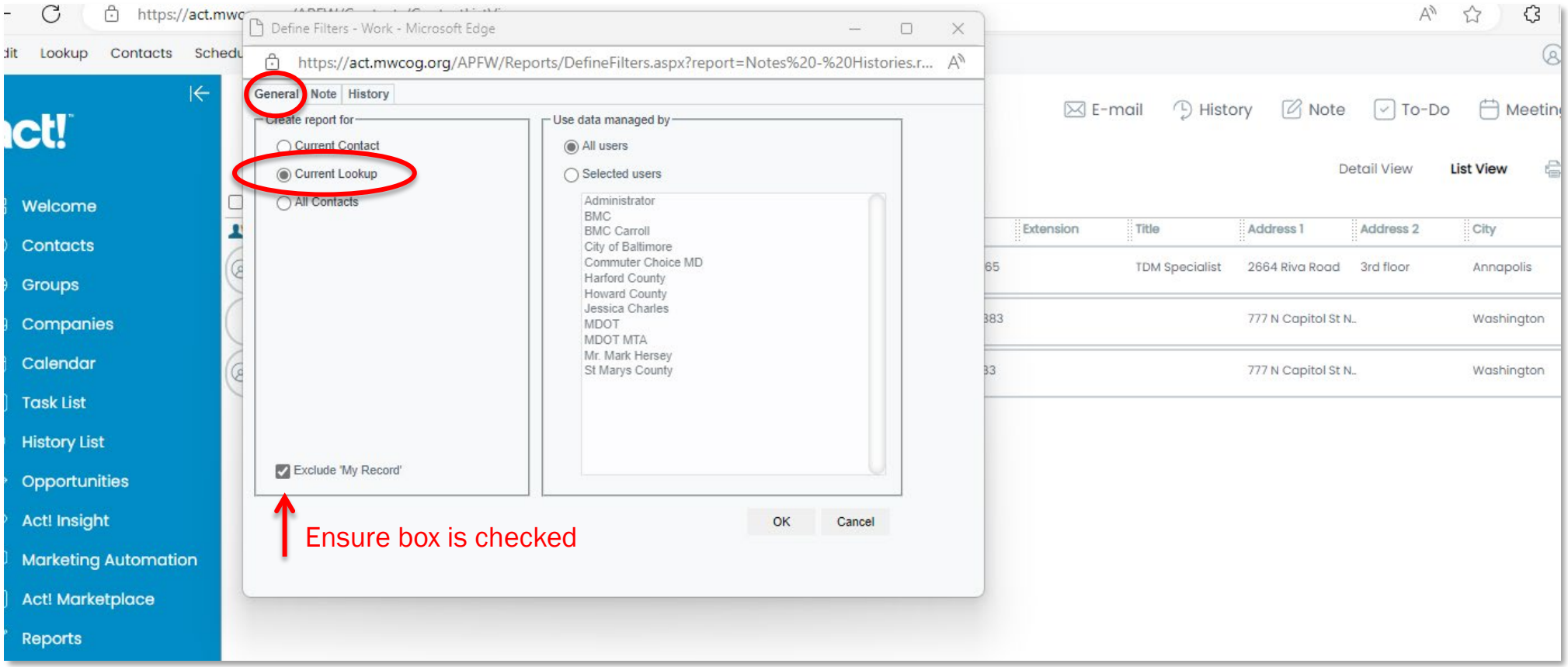
- You'll now select a report option – we'll use the notes/history option



COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Running a Report

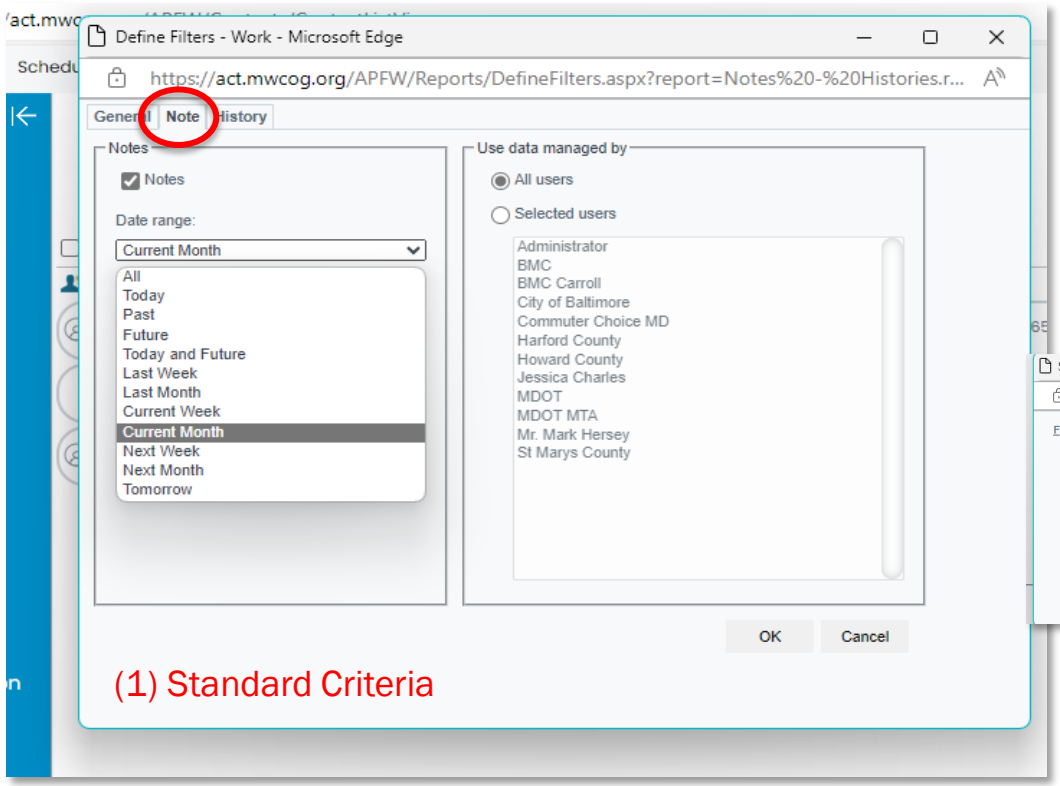
- Here you'll select your report criteria – options current contact, current lookup or all

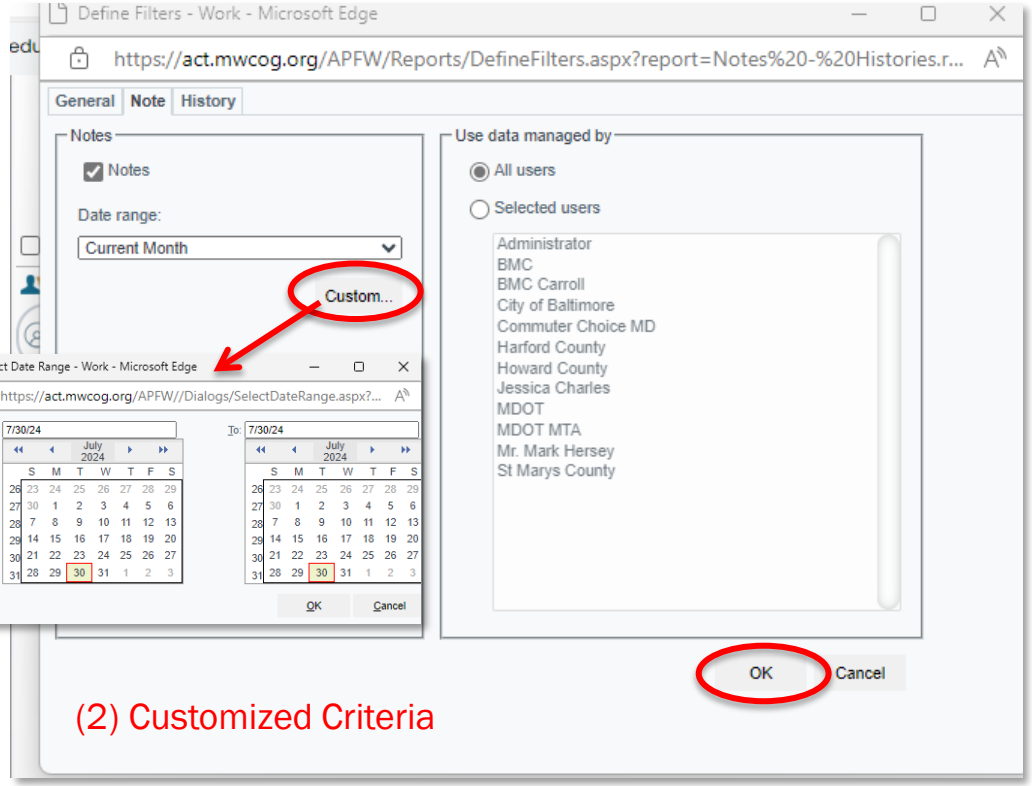


COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Running a Report

- Next you will select criteria for your notes/history both tabs are identical so choose similar criteria – date range are generic you can also choose customized criteria then click ok





COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Running a Report - Results

- Here is what your result will look like

Notes/History

Mr. Mark Hersey, MWCOG
777 N Capitol St NW, Suite 300
Washington, DC 20002-4239

Date Range - 7/1/2024 - 7/31/2024

Contact Jessica Charles — Anne Arundel County Office of

Histories

Date	Time	Result	Regarding & Details	Record Manager
7/23/2024	9:58 AM	Field Changed	Field changed Field Salutation changed from "" to "- Jessica"	Jessica Charles
7/23/2024	9:58 AM	Field Changed	Field changed Field Salutation changed from "- Jessica" to "Jessica"	Jessica Charles
7/23/2024	9:58 AM	Field Changed	Field changed Field Contact changed from "Anne Arundel County - Jessica Charles" to "Jessica Charles"	Jessica Charles
7/23/2024	9:57 AM	Field Changed	Field changed Field Salutation changed from "" to ""	Jessica Charles
7/23/2024	9:57 AM	Field Changed	Field changed Field Contact changed from "Jessica Charles-Allen" to "Anne Arundel County - Jessica Charles"	Jessica Charles
7/23/2024	9:40 AM	Field Changed	Field changed Field ID/Status changed from "" to "UNDELIVERABLE"	Jessica Charles
7/23/2024	9:35 AM	Field Changed	Field changed Field Current Programs changed from "" to "Flextime;GRH;Incentive $;Presentation"	Jessica Charles
7/23/2024	9:30 AM	Field Changed	Field changed Field Salutation changed from "Jessica" to ""	Jessica Charles
7/23/2024	9:29 AM	Field Changed	Field changed Field Web Site changed from "Anne Arundel County Office of Traanportation" to "www.aacounty.org/transit"	Jessica Charles
7/23/2024	9:26 AM	Field Changed	Field changed Field Type of Business changed from "Transportation and Wharehousing" to ""	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Company changed from "" to "Anne Arundel County Office of Transportation"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Salutation changed from "Anne" to "Jessica"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Contact changed from "Anne Arundel" to "Jessica Charles-Allen"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Web Site changed from "" to "Anne Arundel County Office of Traanportation"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Title changed from "" to "TDM Specialist"	Jessica Charles

Created 7/30/2024 at 12:53 PM — Page 1 of 1

COMMUTER CONNECTIONS | A SMARTER WAY TO WORK

Mark Hersey

TDM Employer Outreach Program Specialist
(202) 962-3383
mhersey@mwcog.org

commuterconnections.org

Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

COMMUTER CONNECTIONS | A SMARTER WAY TO WORK