

Engage Online Help



aurigo[®] 
ENGAGE

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1. Aurigo Engage

1.1. Introduction

1.1.1. Introduction to Aurigo Engage

Aurigo Engage is a software as a service (SaaS) based product that enables infrastructure and construction agencies to efficiently collaborate with general public potentially using a proposed infrastructure. Aurigo Engage is a reliable full-featured web-based solution to determine general public sentiments on proposed projects. It is designed to collate and analyze general public feedback on potential projects early in the capital planning process. Aurigo Engage uses robust artificial intelligence (AI) tools to perform powerful analysis on the collated feedback and provides critical insights into user sentiment so agencies can decide on the best approach to the proposed project.

Aurigo Engage enables agencies to easily create and effectively promote campaigns for proposed capital projects, solicit feedback from potential users of the infrastructure, analyze feedback, acknowledge, and respond to feedback. Aurigo Engage enables general public to view details of proposed projects in campaigns and voice their opinions on the projects.

Once a campaign with information on the proposed project is created, infrastructure and construction agencies can broadcast and promote these campaigns using social media such as Facebook, Twitter, LinkedIn, and other media to solicit feedback. Aurigo Engage then performs powerful sentimental analysis on the feedback received and presents analyzed information efficiently. Based on these effective illustrations of general public sentiment that Aurigo Engage provides, agencies can now make informed decisions on proposed projects.

Aurigo Engage involves the following phases:

1. Configure [application settings](#) to customize the application.
2. [Manage application users](#).
3. [Personalize the public portal template and theme](#).
4. [Create a campaign](#) with information on the proposed project.
5. [Create a public portal](#) for the general public to participate in a campaign and share their feedback.
6. [Promote campaigns using social platforms](#) to increase the demographics and user base for augmented user involvement.
7. [Accept, analyze, and respond](#) to the comments from general public for a campaign.

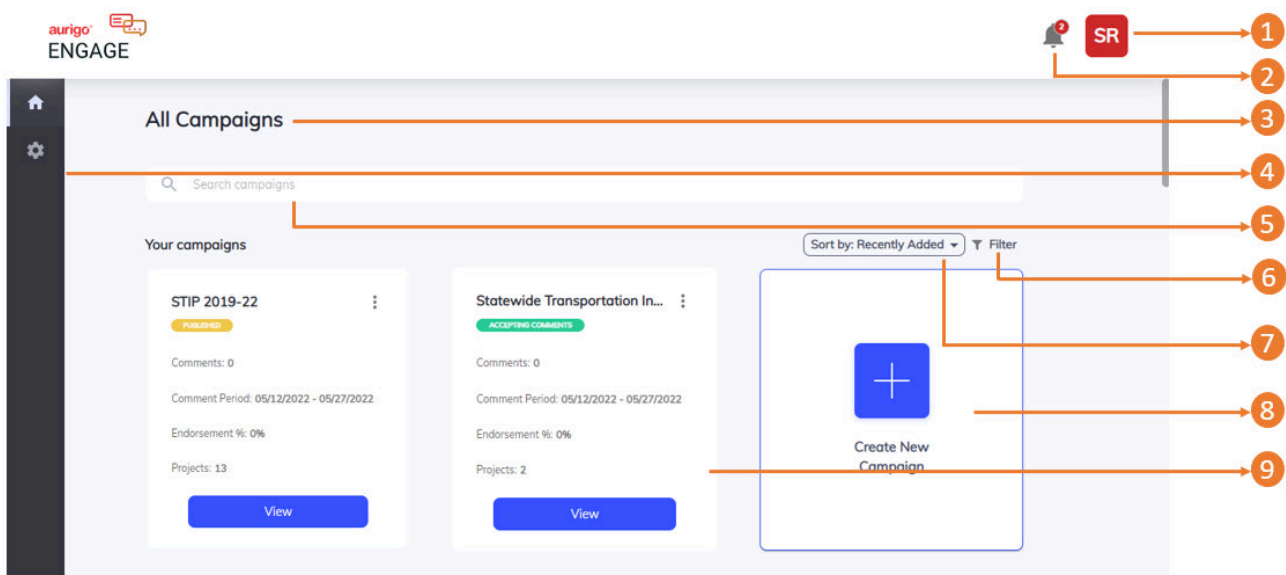
8. [Generate reports](#) based on the sentiments of the comments received from the general public.

1.2. Getting Started

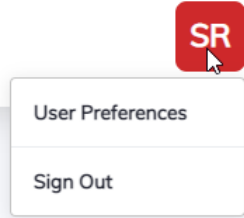
1.2.1. Introduction to Aurigo Engage User Interface

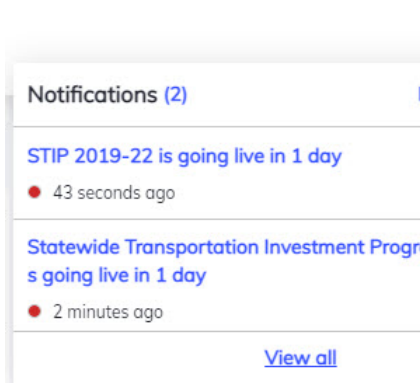
Every time you log in, you begin on the Aurigo Engage Home page. The Aurigo Engage application is configured based on the roles assigned to you and the campaigns managed by you.

The Aurigo Engage Home page comprises various menu options as illustrated in the following sample display.



The user interface of Aurigo Engage contains various elements that are described as follows:

Number	Item	Description
1	Profile Menu	<p>You can view your profile and log out.</p> <p>Click your initials to view the options.</p> 

Number	Item	Description
2	Notifications icon	<p>You can view all notifications along with date and time.</p> <p>Click the Notifications icon to view all the notifications.</p>  <p>Click View all to view all the notifications in the Notifications page.</p>
3	Page Name	You can view the name of the page you are currently in.
4	Module Menu	You can access the various modules by using the module menu options.
5	Search field	You can use this field to search for a particular campaign.
6	Filter Option	<p>You can filter the campaigns by using this option.</p> <p>Click Filter to view the filter options.</p>

Number	Item	Description
		<p>Campaign Status</p> <p><input type="checkbox"/> Accepting Comments <input type="checkbox"/> Closed</p> <p><input type="checkbox"/> Completed <input type="checkbox"/> Draft <input type="checkbox"/> Published</p> <p>Rating</p> <p>0 <input type="range"/> 5</p> <p>Endorsement %</p> <p>0 <input type="range"/> 100</p> <p>Comment Period</p> <p>mm/dd/yy... to mm/dd/yy...</p> <p><input type="button" value="Clear"/> <input type="button" value="Apply"/></p>
7	Sort by drop-down list	<p>You can sort the campaigns by using this drop-down list.</p> <p>Click and select the appropriate option from the drop-down list.</p> <p>Sort by: Recently Added</p> <ul style="list-style-type: none"> Recently Added Rating: High to Low Rating: Low to High Most Comments
8	Create New Campaign	<p>You can create a new campaign by using this option. For information about creating a campaign, refer to Creating a Campaign.</p>
9	Campaign Tile	<p>You can view the campaign name, status of the campaign, number of comments, commenting period, endorsement percentage, and number of projects.</p> <p>Click View to view the campaign.</p>

1.2.2. Engage Home

The **Home** page displays the list of all available campaigns with their statuses and enables the agency users to view a summary of the campaign details. The project campaigns have the following statuses:

- Draft
- Published
- Accepting comments
- Withdrawn
- Completed
- Closed

Status	Description
DRAFT	<ul style="list-style-type: none"> • During campaign creation, the status of the campaign is in the DRAFT status. • When a campaign in PUBLISHED status is withdrawn, the status of the campaign is changed to the DRAFT status.
PUBLISHED	After the user creates and publishes the campaign for general public participation, the campaign is changed to PUBLISHED status.
ACCEPTING COMMENTS	A campaign will start receiving comments from the general public during a specified commenting period. The published campaigns during this commenting period will have the ACCEPTING COMMENTS status. Once the commenting period ends, the status of the campaign changes to COMPLETED status.
WITHDRAWN	When you withdraw an ongoing campaign that is in ACCEPTING COMMENTS status, then the status of the campaign is changed to the WITHDRAWN status.

Status	Description
COMPLETED	After the commenting period is complete, the campaign is changed to COMPLETED status.
CLOSED	After all the analysis for the completed campaign is done, the status of the campaign can be changed to CLOSED status.

The **Search campaigns** field enables you to search for appropriate campaigns and view the details of projects associated with them.

The **Sort by** drop-down list enables you to sort the list of campaigns displayed. The options to sort are as follows:

- Recently Added – The campaigns are sorted based on the date of creation.
- Rating: High to Low – The campaigns are sorted from high to low based on the rating.
- Rating: Low to High – The campaigns are sorted from low to high based on the rating.
- Most Comments – The campaigns are sorted based on the number of comments.

The **Filter** option enables you to filter the campaigns based on the following:

- Campaign Status – You can filter based on the current status of the campaign.
- Rating – You can filter based on the campaign rating. The ratings are given by the general public as feedback.
- Endorsement % - You can filter based on the endorsement percentage of the campaign.
- Comment Period – You can filter based on the commenting period by choosing the start and end date of the commenting period.

1.2.3. Modifying User Preferences

Overview

The **User Preferences** page enables you to update personal information of your account.

Steps

1. In the **Home** page, click the initials of your username at the top right corner of the page.
2. From the drop-down list, click **User Preferences**.

The **User Preferences** page is displayed.

3. Update the **FIRST NAME**, **LAST NAME**, **DEPARTMENT** and **DESIGNATION** fields as per your requirement.

Note: You cannot update or change the email address in the **EMAIL** field.

4. Click **Modify**.
The confirmation dialog box is displayed.
5. Click **OK**.

1.2.4. Changing Password

Overview

You can change your password as per your requirement from the **User Preferences** page.

Steps

1. In the **Home** page, click the initials of your username at the top right corner of the page.
2. From the drop-down list, click **User Preferences**.
The **User Preferences** page is displayed.
3. Click **Change Password**.
The **Change Password** dialog box is displayed.
4. In the **OLD PASSWORD** field, enter the current password.
5. In the **NEW PASSWORD** field, enter a new password.
6. In the **CONFIRM PASSWORD** field, enter the same password you entered in the **NEW PASSWORD** field.
7. Click **Save**.

1.2.5. Retrieving Password

Overview

You can retrieve your password from the login page.

Steps

1. In the **Aurigo Engage** login page, click **Forgot Password?**.
The **Forgot Password?** page is displayed.
2. In the **EMAIL** field, enter your registered email address.
3. Click **Send**.
A reset password link is sent to your registered email address.

4. Open the email received from **Aurigo Engage**, and then click **Reset Password**.
The **Create New Password** page is displayed.
5. In the **EMAIL** field, enter your registered email address.
6. In the **CREATE PASSWORD** field, enter the new password.
7. In the **CONFIRM PASSWORD** field, enter the same password you entered in the **CREATE PASSWORD** field.
8. Click **Save**.
The **Password Updated Successfully** dialog box is displayed.
9. Click **OK**.
The **Aurigo Engage** login page is displayed.

1.2.6. Logging Out of Aurigo Engage

Overview

You can log out of **Aurigo Engage** by using **Sign Out** option.

Steps

1. In the **Home** page, click the initials of the username at the top right corner of the page.
2. Click **Sign Out**.
This ends the user-session and logs the user out from the application.

2. Settings

2.1. User Roles

The application supports the following roles for a user:

- [Super User](#)
- [Campaign Manager](#)
- [Reviewer](#)

Super User

The Super User is authorized to access the user administration module in the application. The Super User is responsible for all the user management activities such as user creation, modification, and deletion. A Super User can create another super user in the system by assigning Administrator role to a user.

Campaign Manager

The Campaign Manager is responsible for managing and supervising tasks, features, and other related elements appropriate to a specific campaign. The Campaign Manager is restricted to use **Application Settings**.

Reviewer

The Reviewer can review a campaign, review a project in a campaign, generate reports, and see insights. The Reviewer is restricted to use **Application Settings**.

2.2. User Management

The **Users** page enables you to perform the following tasks:

- [Add Users](#)
- [Edit Users](#)
- [Delete Users](#)

2.2.1. Adding Users

Overview

You can create an account for a user to log into and use the Aurigo Engage application.

Steps

1. In the **Home** page, click **Settings**, and then select **Users**.

The **Users** page is displayed.

2. Click **Add New User**.

The **Add New User** page is displayed.

3. Provide the appropriate information in the fields, as described in the following table.

Field Name	Description
FIRST NAME	Enter the first name of the user.
LAST NAME	Enter the last name of the user.
EMAIL	Enter the email address of the user.
PRIVILEGE	Enter the security permission role of the user.
DEPARTMENT	Enter the department of the user.
DESIGNATION	Enter the designation of the user in the organization.

4. Click **Create**.

A new user is created.

An email is sent inviting the new user to **Aurigo Engage**.

2.2.2. Updating User Details

Overview

You can modify user account details such as first name, last name, privilege, department, or designation of a user account.

Steps

1. In the **Home** page, click **Settings**, and then select **Users**.

The **Users** page is displayed.

2. In the **Users** page, select the appropriate user, and click .

The **Edit User Details** page is displayed.

3. Select the appropriate fields to edit.

Note: The **EMAIL** address of the user cannot be updated once the user account is created.

4. Click **Save**.

Note: By default, the user is disabled in the system.

5. Click the confirmation link sent to the registered email to confirm the details.


Note: After successful confirmation, the user account is enabled in the application.

2.2.3. Deleting a User

Overview

You can delete a user account to prevent a user from accessing the application. On deleting an account, the user cannot log into the application.

Steps

1. In the **Home** page, click **Settings**, and then select **Users**.
The **Users** page is displayed.
2. In the **Users** page, select the appropriate user, and click  .
A confirmation message is displayed.
3. Click **Yes**.
The user is successfully deleted from the system.

2.3. Public Portal Settings

The **Public Portal Settings** page enables you to configure the display settings for the public portal. It enables you to create or update a public portal template by selecting the appropriate layout, logo, header, font and layout color, and define public portal form fields.

2.3.1. Managing a Template

Overview

You can manage the public portal template by changing the layout, logo, and header.

Steps

1. In the **Home** page, click **Settings**, and then select **Public Portal Template**.
The **Public Portal Settings** page is displayed.
2. In the **CHOOSE LAYOUT** section, select a layout or theme for the portal.
3. To add a logo, in the **LOGO** section, click **Add Logo** to browse and select the appropriate logo.

4. In the **ADD HEADER TITLE** section, enter the title for the public portal.



2.3.2. Adding Form Fields

Overview

You can add additional form fields in the **Define Public Portal Form Fields** section in addition to the default system fields. The default system fields are as follows:

- **Rate This Project**
- **Name**
- **Email**
- **Comment**
- **Zip Code**

Steps

1. In the **Home** page, click **Settings**, and then select **Public Portal Template**.
The **Public Portal Settings** page is displayed.
2. In the **DEFINE PUBLIC PORTAL FORM FIELDS** section, click **Add Field**.
The **Add Custom Field** dialog box is displayed.
3. In the **FORM FIELD NAME** field, enter the name of the field.
4. In the **INPUT CONTROL TYPE** drop-down field, select the appropriate input type from the drop-down list.
5. Click **Add**.
The field is added to the form fields list.
6. To update or delete a custom field, perform the following:
 - Click  to edit or update information of a custom field.
 - Click  to delete a custom field.
7. To display the custom field in the public portal, in the **Show on Public Portal** column, select **Yes** against the appropriate field.
8. To make the custom field as mandatory field in the public portal, in the **Is a Required Field** column, select **Yes** against the appropriate field.

2.3.3. Adding Layouts and Fonts

Overview

You can add or change the color of the public portal layout and font.

Steps

1. In the **Home** page, click **Settings**, and then select **Public Portal Template**.
The **Public Portal Settings** page is displayed.
2. In the **CHOOSE A LAYOUT COLOR:** section, select the theme color for the portal.
3. In the **CHOOSE A FONT COLOR:** section, select the font color for the portal.
4. Click **Preview Portal** to preview the portal.
5. Click **Save Template**.

2.4. Application Settings

The **Application Settings** page enables the Super User to perform the following tasks:

- [Configure and update organization settings](#)
- [Define optional project fields](#)
- [Define categories to segregate user comments](#)
- [Define Terms of Use settings](#)

2.4.1. General Settings

Overview

The **General Settings** section enables you to update the agency name and add a logo to the campaign.

Steps

1. In the **Home** page, click **Settings** and then select **Application Settings**.
The **Application Settings** page is displayed.
2. In the **General Settings** section, perform the following steps:
 - a. In the **AGENCY NAME** field, enter the name of the agency.
 - b. In the **EMAIL** field, enter the name of the email address.
 - c. In the **LOGO** field, click **Add Logo** to browse and select the logo.
3. Click **Save**.

2.4.2. Project Fields

Overview

The **Project Fields** section is optional. This section enables you to add fields to display additional project details in the public portal.

Steps

1. In the **Home** page, click **Settings**, and then select **Application Settings**.
The **Application Settings** page is displayed.
2. In the **Project Fields** section, click **Add Field**.
The **Add Project Field** dialog box is displayed.
3. In the **FORM FIELD NAME** field, enter the field name.
4. Click **Add**.

Note: The new form field is added to the **Project Fields** section.

2.4.3. Terms of Use Settings

Overview

The **Terms of Use Settings** section enables you to set the terms of use for the general public while using the Public Portal. This Terms of Use is displayed in the Public Portal for the general public's awareness.

Steps

1. In the **Home** page, click **Settings**, and then select **Application Settings**.
The **Application Settings** page is displayed.
2. In the **Terms of Use Settings** section, enter the terms of use that you want to define for the general public while using public portal.

Note: The **Terms of Use** defined here is displayed in the public portal. It is mandatory for the general public to read the terms of use before submitting their feedback.

3. Click **Save**.

3. Campaigning for Projects

3.1. Campaigning for Projects

Aurigo Engage enables you to;

- Create campaigns with the appropriate project information
- Collect and respond to public feedback
- Draw the valuable insights to keep the general public aware of proposed projects
- Receive general public's valuable feedback on the projects

Campaigning new projects involves the following stages:

1. [Creating a campaign](#)
2. [Managing projects in a campaign](#)
3. [Publishing a campaign](#)
4. [Posting a campaign on social media](#)
5. [Withdrawing a campaign](#)
6. [Copying the public portal URL](#)
7. [Downloading a QR Code](#)
8. [Deleting a campaign](#)
9. [Closing a campaign](#)

3.2. Creating a Campaign

Overview

This feature enables you to create a campaign with project related information.


Note: Ensure all the project fields are created in the [Application Settings](#).

Steps

1. In the **Home** page, click the **Create New Campaign** tab.
The **Create a New Campaign** page is displayed.
2. Provide the appropriate information in the fields, as described in the following table.

Field Name	Description
CAMPAIGN TITLE	Enter the name of the campaign.
START DATE	Select the start date of the campaign. The campaign starts on this date and

Field Name	Description
END DATE	<p>is open to the general public to provide feedback.</p> <p>Select the end date of the campaign. The campaign ends on this date, and general public cannot provide feedback.</p> <p>Note: Based on the selected START DATE and END DATE, the CAMPAIGN PERIOD(IN DAYS) field displays the number of days calculated based on the calendar dates.</p>
DESCRIPTION	<p>Enter a description of the campaign explaining about the proposal and purpose of associated projects along with the supporting documents.</p>

- In the **ATTACHMENTS** section, drag and drop files or click  to browse and attach files.

Note: To provide additional details about the campaign, you can attach all supporting documents to be shared on the public platform.

- Click **Next**.

The **Add Projects** tab is displayed.

You can now add details of proposed projects to the campaign. To add projects to the campaign, refer to [Managing Projects for a New Campaign](#).

The campaign is saved in **DRAFT** status.

3.3. Managing Projects in a Campaign

Before You Begin

- The campaign is in **DRAFT** status.
- Ensure the project details are available in .csv, .xls, .xlsx, or .xlsm formats.

Note: The project details file contains project information such as project name, location, description, and so on.

Overview

Campaign management enables you to organize projects in a seamless and systematic manner under an appropriate campaign.

You can perform the following tasks:

- [Add projects to a campaign.](#)
- [Add additional projects to a campaign.](#)
- [Map project fields to be displayed on the public portal based on the requirement.](#)

Steps

1. In the **Add Projects** tab, click  to import the project details.

2. Click **Save**.

The **File saved successfully** message is displayed.

3. Click **Next**.

The **Map Fields** page is displayed.

Note: You can enter the location information of projects in the **Location** field so that it is visible to the general public in the Public Portal map. This enables the general public user to geo locate the projects on the map.

4. To make sure the correct fields are visible in the public portal with correct information, map the **Source Field** from the imported project to the **Destination Field**.

Note: **Destination Fields** are the fields that are visible to the general public in the Public Portal.

For information on adding additional form fields, refer to [Adding Form Fields](#) on page 15.

5. To display the fields in the public portal, select the **Show on Public Portal** check box corresponding to the project field.



6. Click **Next**.

The **Project List** page is displayed.

7. In the **Project List** page, perform the following steps as applicable:

- To add additional projects to the **Project List**, perform the following steps:
 - a. In the **Project List** page, click **Add New Project**.
The **Add New Project** dialog box is displayed.
 - b. In the **Add New Project** dialog box, enter the required project details.

Note: Only **Project** field is mandatory.

- To update a project, perform the following steps:
 - a. In the **Project List** page, click .
 - The **Edit ProjectDetails** dialog box is displayed.
 - b. Edit the fields as per the requirement.
 - c. Click **Save**.
- To delete a project, perform the following steps:
 - a. In the **Project List** page, click .
 - The confirmation dialog box is displayed.
 - b. Click **Yes**.

8. Click **Next**.

The **PREVIEW & PUBLISH** tab is displayed.

The campaign is saved in **DRAFT** status.

To preview and publish the campaign, refer to [Publishing a New Campaign](#).

3.4. Publishing a Campaign

Before You Begin

The campaign is in **DRAFT** status.

Overview

You can preview the campaign details in the public portal and publish the campaign. Once published, the campaign will be available for the general public to provide their feedback during the commenting period specified for the campaign.

Steps

1. In the **Preview & Publish** tab, click **Preview Public Portal** to preview the portal.
The **Public Portal** page opens in a new tab.

2. In the **Public Portal** page, verify the following points:
 - a. Check whether all the campaign details are visible in the public portal as per the public portal template and layout selected in the [Public Portal Settings](#) on page 14.
 - b. Also, check whether you can view the location of the project in the map, and when you select the location in the map, the relevant project details are selected in the project list.
3. In the **Preview & Publish** tab, select the check boxes to confirm that all the details such as **Campaign Details**, **Project List**, and **Public Portal** pertaining to the campaign are reviewed.
4. To review the terms of use set for the general public, click **Terms of Use** URL. If it is not defined, then click **Application Settings** in the dialog box to navigate to the [Terms of Use](#) section.

Note: The campaign is saved in **Draft** status when you navigate to update the terms of use.

5. Click **Publish**.

The confirmation dialog box is displayed.

The campaign is saved in **PUBLISHED** status.

The status of the campaign changes from **PUBLISHED** status to **ACCEPTING COMMENTS** status during the commenting period selected for the campaign.

Note: You are notified in the **Notifications** icon:

- From the last two days before a campaign goes live
- From the last four days before a campaign's commenting period ends


For more information about promoting a campaign on social media platforms, refer to [Posting a Campaign on Social Media](#) on page 22.

3.5. Posting a Campaign on Social Media


Overview

Posting campaigns on social media reduces time and effort to coordinate, collect, analyze, and report the information to the management. It also enables the agency users to reach a larger audience efficiently resulting in larger number of feedback and a detailed idea of general public sentiments.





Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **All Campaigns** page, select the appropriate campaign in **PUBLISHED** status or in **ACCEPTING COMMENTS** status and click .
A drop-down list is displayed.
3. From the drop-down list, select **Post Campaign on Social Media**.
The **Promote <campaign name>** page is displayed.

Note: In the **PUBLIC PORTAL URL** field, the URL for the campaign is displayed.

4. In the **IMAGE** section, click the  icon to browse and upload an image for the campaign promotion.
5. In the **DESCRIPTION** section, modify the pre-populated description as required.

Note: The character limit for social media portals is as follows; Twitter – 280, LinkedIn – 3000, and Facebook – 500.

6. To copy the public portal URL, in the **PUBLIC PORTAL URL** section, perform the following steps:
 - a. Click .
The URI is copied.
 - b. Paste the URL in the web browser to view the public portal.
7. To download the QR code, in the **PUBLIC PORTAL URL** section, perform the following steps:
 - a. Click .
The QR code is displayed.
 - b. To download the QR code as an image, click .
The QR code is downloaded as an image.
 - c. To download the QR code as a PDF, click .
The QR code is downloaded as a PDF.
8. In the **PROMOTE** section, click **Post on <social media icon>** to preview the post.
The **<social media icon>Post Preview** dialog box is displayed.

9. Click **Post**.

3.6. Withdrawing a Campaign

Before You Begin

The campaign is in **PUBLISHED** or **ACCEPTING COMMENTS** status.


Overview

You can withdraw a published or an ongoing campaign. If a campaign is no longer valid or you wish to update the campaign, then you can withdraw it. After the campaign is withdrawn, you can update it accordingly.

When a campaign is withdrawn from **PUBLISHED** status, the campaign is moved to **DRAFT** status.

When an ongoing campaign is withdrawn from **ACCEPTING COMMENTS** status, the campaign is moved to **WITHDRAWN** status.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the campaign either in **PUBLISHED** status or in **ACCEPTING COMMENTS** status and click .
3. From the drop-down list, select **Withdraw Campaign**.
A confirmation dialog box is displayed.
4. Click **Yes**.
The campaign is withdrawn successfully.
 - For information on publishing a campaign, refer to [Publishing a Campaign](#) on page 21.
 - For information on deleting a campaign, refer to [Deleting a Campaign](#) on page 25.

3.7. Copying the Public Portal URL

Overview

You can copy the public portal URL in the **All Campaigns** page.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.

2. In the **Your campaigns** section, select the appropriate campaign, and click .

Note: The **Public Portal URL** is not available for the campaigns in **DRAFT** status.

3. From the drop-down list, select **Copy Public Portal URL**.
4. Paste the URL in the web browser to view the public portal.

3.8. Deleting a Campaign


Before You Begin

The campaign is in **DRAFT** status.

Overview

You can delete a campaign in the **All Campaigns** page.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the appropriate campaign in **DRAFT** status, and click .
3. From the drop-down list, select **Delete Campaign**.
A confirmation dialog box is displayed.
4. Click **Yes**.

3.9. Closing a Campaign


Before You Begin

The campaign is in **COMPLETED** status.

Overview

You can close a campaign in the **All Campaigns** page.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the appropriate campaign in **COMPLETED** status, and click .
3. From the drop-down list, select **Close Campaign**.
A confirmation dialog box is displayed.

4. Click **Yes**.

The campaign is closed successfully, and the status is changed to **CLOSED** status.

4. Viewing Campaigns

4.1. Viewing Campaigns

Campaigns can be viewed irrespective of their status. However, based on the status of the campaign, the information you view and the editing criteria differ.

4.2. Viewing Campaigns in Draft Status

Overview

Viewing campaigns in the **DRAFT** status enables you to edit campaign details based on the requirement or delete it and create a new campaign.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the appropriate campaign in **DRAFT** status, and click **View**.
The **Create a New Campaign** page is displayed.
3. Update the information as per your requirement.
For more information, refer to [Creating a Campaign](#) on page 18.

4.3. Viewing Campaigns in Accepting Comments Status

Overview

Viewing Campaigns in the **ACCEPTING COMMENTS** status enables you to view the comments and ratings provided by general public for a project in the campaign.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the appropriate campaign in **ACCEPTING COMMENTS** status, and click **View**.
The **Campaign Details** page is displayed.
The following information is available:

Tabs	Description
CAMPAIGN DETAILS	Displays the campaign details.

Tabs	Description
PROJECT LIST	Displays the list of available projects.
COMMENTS	Displays the list of comments for the campaign.
ANALYTICS	Displays analytical information based on the sentiments from the comments.
REPORTS	Displays reports for the campaign.

4.4. Viewing Campaigns in Completed Status

Viewing campaigns in the **COMPLETED** status enables you to view the campaign with the same information as the campaigns in the **ACCEPTING COMMENTS** status. However, the comments from the general public are restricted.

For more information, refer to [Viewing Campaigns in Accepting Comments Status](#) on page 27.

4.5. Responding to Comments

Overview

You can respond to a general public comment.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your Campaigns** section, select the appropriate campaign in **ACCEPTING COMMENTS** status.
3. Click **View**.
The **Campaign Details** page is displayed.
4. Select the **COMMENTS** tab.
The **Comments** section displays the list of all the comments.

5. To respond to a single comment, perform the following steps:
 - a. Select the appropriate comment and click **Actions**, and then click **Reply**.
The comment is displayed with option to respond.
 - b. Click **Reply**.
The box to enter your response is displayed.
 - c. Enter your response in the box and click **Send**.
The response is sent successfully.
6. To respond to multiple comments, perform the following steps:
 - a. Select all the appropriate comments from the list and click **Actions**, and then click **Reply**.
The field to enter response is displayed.
 - b. Enter your response in the box and click **Send**.

Note: You are notified through the **Notifications** icon whenever any response is received from the general public.

4.6. Viewing Analytics for Campaigns and Projects

Viewing analytics for a campaign is essentially analyzing the entire campaign. A campaign may consist of a single project or grouped in multiple projects.

To view analytics for a campaign or a project in a campaign, refer to [Analyzing a Campaign by Comments](#).

4.7. Previewing a Campaign

Overview

Previewing a campaign is done using either of the following types:

- Based on the data that are entered.
- Using the Public Portal.

To preview a campaign based on the data that are entered, refer to [Publishing a Campaign](#) on page 21.

Previewing a campaign using the Public Portal enables you to see how it appears to the general public.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.

2. Enter a project name in the search field to look for an appropriate project.
3. In the **All Projects** section, select an appropriate project to view all the details pertaining to that project.
4. Click **Reference Documents** to view reference documents such as project design, project execution plan, and so on.
5. To verify the project's location in the map, zoom in the map. Select the appropriate project location in the map to view more details of the project.

5. Reports and Dashboards

5.1. Analyzing a Campaign

Campaign analysis enables the Campaign Manager to analyze ongoing campaigns and withdraw or post an ongoing campaign.

Campaign analysis involves the following:

- [Viewing Promotion Details](#)
- [Analyzing a Campaign by Projects](#)
- [Analyzing a Campaign by Comments](#)

5.1.1. Viewing Promotional Details

Overview

Promotional details comprises details such as when and in which social platforms the campaign was promoted on social media.

Promotional details are applicable for:

- Campaigns that are in the **PUBLISHED** status and in the **ACCEPTING COMMENTS** status.
- Campaigns that are withdrawn after being published and are in the **DRAFT** status.
- Ongoing campaigns that are withdrawn and are in the **WITHDRAWN** status.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In the **Your campaigns** section, select the appropriate campaign in **PUBLISHED** or **ACCEPTING COMMENTS** status.
3. Click **View**.
The **SHARED ON** section displays on which social platforms the campaign promotion is shared along with the last promotion date.

5.1.2. Analyzing a Campaign by Projects

Overview

You can analyze campaigns by projects for the campaigns in the **ACCEPTING COMMENTS** status.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.

The **All Campaigns** page is displayed.

2. In the **Your campaigns** section, select the appropriate campaign in **ACCEPTING COMMENTS** status.

3. Click **View**.

The **Campaign Details** page is displayed.

4. Click the **PROJECT LIST** tab.

The **Project List** dashboard displays all the projects available in the campaign.

You can view all the projects and analyze them based on the sentiments from the comments provided by the general public, endorsement percentage, and the average rating.

5. To view analysis of a project under a campaign, in the **PROJECT LIST** tab, click any project name.

The **ANALYTICS** tab is displayed. The **ANALYTICS** tab represents a comprehensive analysis of the project. You can view the following information:

- Public Sentiment – This is determined by the number of positive comments received from the general public.
- Breakdown of public comments over time – This graph shows the number of positive, neutral, and negative comments received from the general public.
- Participation Trend – This graph shows the number of participations on a given date and its trend.
- Top Positive Sentiments – This shows the top positive comments received from the general public.
- Top Negative Sentiments – This shows the top negative comments received from the general public.

5.1.3. Analyzing a Campaign by Comments

Overview

You can analyze campaigns by comments for the campaigns in the **ACCEPTING COMMENTS** status.

Steps

1. In the **Home** page, click **Home**, and then click **All Campaigns**.

The **All Campaigns** page is displayed.

2. In the **Your campaigns** section, select the appropriate campaign in the **ACCEPTING COMMENTS** status.

3. Click **View**.

The **Campaign Details** page is displayed.

4. To analyze all the comments for the campaign from the **COMMENTS** tab, perform the following steps:

- a. Click the **COMMENTS** tab.

The **Comments** section displays the list of comments given by the general public for an appropriate project.

You can filter the comments based on **User, Project, Category, Sentiment, Date,** and **Responses**.

Note: You are notified through the **Notifications** icon whenever any comment is received.

5. To analyze all the comments for the campaign from the **ANALYTICS** tab, perform the following steps:

- a. Click the **ANALYTICS** tab.

The **Campaign Analytics** page is displayed.

- b. Select **CAMPAIGN BREAKDOWN** to view various portlets that provides analysis of the campaign.

The user can see portlets such as sentiment breakdown, word clouds, breakdown of public comments over time, participation trend, top positive and

negative comments, breakdown of comments by category, and breakdown of comments by rating.

Note: You can select the **PROJECT BREAKDOWN** tab to view insights of comments for a project.

- c. To view further analysis of the comments in the **Comments Overview** portlet, perform the following steps:
 - i. Click the progress bar of **Positive**.
A detailed insight of all the positive comments is displayed.
 - ii. To view another comment type, click the tabs next to **Comments Overview**.
 - iii. To reply, select a comment and click **Reply**.
- d. To return to the **CAMPAIGN BREAKDOWN** page, click **Back**.

5.2. Campaign Reports

You can generate various campaign reports that illustrate various information views. These reports enable you to generate and download reports specific to a campaign and projects in a campaign. You can also download a copy of the report and print a report.

For information on generating, downloading, and printing a report, refer to [Generating Reports](#).

You can generate the following reports:

- Campaign Report
 - Campaign Overview - This report helps the user to fetch campaign level information such as commenting period, number of projects, endorsement percentage, and overall sentiment of the campaign. It lists also all the projects in the campaign, number of received comments, average rating, endorsement percentage, and sentiment of each project.
- Projects Report
 - Positive Sentiment - This report filters out details such as number of comments, average rating, and endorsement percentage of all the projects in the campaign having overall positive sentiments from the users. The report contains campaign details along with projects list having positive sentiments.
 - Negative Sentiment - This report filters out details such as number of comments, average rating, and endorsement percentage of all the projects in the campaign having overall negative sentiments from the users. The report contains campaign details along with projects list having negative sentiments.
 - Neutral Sentiment - This report filters out details such as number of comments, average rating, and endorsement percentage of all the projects in the campaign

having neutral sentiments from the users. The report contains campaign details along with projects list having neutral sentiments.

- High Rated (>3.5) - This report filters out details such as number of comments, average rating, and endorsement percentage of all the projects in the campaign having average rating more than 3.5 from the users. The report contains campaign details along with the list of filtered projects.
- Low Rated (<3.5) - This report filters out details such as number of comments, average rating, and endorsement percentage of all the projects in the campaign having average rating less than 3.5 from the users. The report contains campaign details along with the list of filtered projects.
- Comments Report
 - Project Comments - This report lists all the comments received from the general public user for each project. All the comments are reported under the project along with user information, comments sentiment, and rating.
 - Category wise comments - This report lists all the comments by category received from the general public user for each project. All the comments are segregated as per the categories defined along with user information, comments sentiment, and rating.
- Custom Report
 - Project Comments (You can select a specific project to view the comments.)
 - This report enables the user to select a particular project and fetch all user comments received for that project. All the comments are reported under the project along with user information, comments sentiment, and rating.

5.3. Generating Reports

You can generate reports for different information views for all the campaigns in the application. Aurigo Engage provides report filters to generate reports with specific information.

The standard report functions include the following:

- [Generate a Report](#)
- [Print a Report](#)
- [Save a report in various formats](#)

5.3.1. Generating a Report

Overview

You can generate various campaign and project reports that illustrate various information views. These reports enable campaign managers to stay up-to-date on the status of campaigns.

Steps


1. In the **Home** page, click **Home**, and then click **All Campaigns**.
The **All Campaigns** page is displayed.
2. In **Your campaigns** section, select a campaign and click **View**.
The **Campaign Details** page is displayed.
3. Select the **Reports** tab.
The **Reports** section displays list of all the reports.
4. Select the appropriate report to generate and view the report.

5.3.2. Printing a Report

Overview

You can print a copy of the generated campaign and project reports.

Steps


1. Generate the appropriate report.
2. In the report toolbar, click **Print Report** .

5.3.3. Saving a Report

Overview

You can save a copy of the generated campaign and project reports.

Steps

1. Generate the appropriate report.
2. Click **Download** .

Note: You can download only in .PDF or .xls formats.

6. Public Portal Users

6.1. Public Portal Users

The general public can view the campaign by visiting the Public Portal. The general public can provide their feedback for the project campaigns.

The Public Portal provides the following features:

- [View a project](#)
- [Search a project](#)
- [Rate and share comments for a project](#)
- [View and download reference documents](#)

6.2. Viewing a Project

Overview

You can view the project details in the Public Portal.

Steps

1. Access the Public Portal.
The **Home** page is displayed.
2. In the **All Projects** section, select the appropriate project.
The project details are displayed.

6.3. Searching a Project

Overview

You can search for projects in the Public Portal.

Steps

1. Access the Public Portal.
The **Home** page is displayed.
2. In the **Search for projects** field, enter the name of the appropriate project.

3. Select the project.

The details of the appropriate project is displayed.

6.4. Rating and Sharing Comments for a Project

Overview

You can rate and share comments for a project in the Public Portal.

Steps

1. Access the Public Portal.

The **Home** page is displayed.

2. In the **All Projects** section, select the appropriate project.

The details of the appropriate project is displayed.

3. In the map, zoom in to view the project location and the project details.

4. In the **RATE THIS PROJECT** section, select the rating based on your sentiment.

5. Enter the following information:

Field Name	Description
NAME	Enter your name.
EMAIL	Enter your email address.
COMMENT	Enter your comments.
ZIP CODE	Enter the zip code of your location.

6. Click **Terms of Use**.

The **Terms of Use** dialog box is displayed.

7. Read the terms of use and select the **I accept the Terms of Use** check box.

8. Click **Submit**.

Note: You cannot submit the feedback without selecting the **I accept the Terms of Use** check box.

9. To share the QR code of the campaign using a mobile device, perform the following steps:

- a. Click .

The QR code for the campaign is displayed.

- b. To download the QR code, click .

The QR code is downloaded and you can share with others.

6.5. Viewing and Downloading Reference Documents

Overview

You can view and download reference documents in the Public Portal.

Steps

1. Access the Public Portal.
The **Home** page is displayed.
2. Click **Reference Documents**.
The **Reference Documents** dialog box is displayed.
3. Select the document that you want to view and download.
A copy of the selected document is downloaded to your local drive.
4. Click **OK**.