Canceling the Subscription

Contents

Canceling the Subscription

You can cancel your subscription at any time.

1. **In the Home page, click the initials of your user name at the top right corner of the page.**
2. **From the drop-down list, click Subscription Details . The Subscription Details page is displayed.**
3. **Click Cancel Subscription.**
4. **Click OK in the dialog box. Your subscription is canceled but will be valid until your current plan expires. Figure 1. Cancel Subscription Dialog Box**

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**

Contact Us

You can contact us for any queries related to support and sales.

1. **In the Home page, click the initials of your user name at the top right corner of the page.**
2. **From the drop-down list, click Contact Us . The Contact us for any queries! window is displayed. Figure 1. Contract us for any queries!**

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.**

Closing a Campaign

The campaign is in **COMPLETED** status.

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

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.**

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	• **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.**

Status	Description
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.
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.**

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 of various menu options as illustrated in the following sample display.

Figure 1. Home Page

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

Number	Item	Description
1	Profile Menu	You can view your profile and log out. Click your initials to view the options.
2	Notifications icon	You can view all notifications along with date and time. Click the **Notifications** icon to view all the notifications. Click **View all** to view all the notifications in the **Notifications** page.
3	Information Icon	You can view a quick walkthrough of the Aurigo Engage. Click the **Information** icon to watch a quick walkthrough video of the Menu options.
4	Page Name	You can view the name of the page you are currently in.
5	Search field	You can use this field to search for a particular campaign.
6	Module Menu	You can access the various modules by using the module menu options.
7	Filter Option	You can filter the campaigns by using this option. Click **Filter** to view the filter options.
8	Sort by drop-down list	You can sort the campaigns by using this drop-down list. Click and select the appropriate option from the drop-down list.
9	Information Icon	You can view a quick walkthrough of the Aurigo Engage. Click the **Information** Icon to watch a quick walkthrough video of creating a new campaign.

Number	Item	Description
10	Create New Campaign	You can create a new campaign by using this option. For information about creating a campaign, refer to Creating a Campaign.
11	Campaign Tile	You can view the campaign name, status of the campaign, number of comments, commenting period, endorsement percentage, and number of projects. Click **View** to view the campaign.

Copying the Public Portal URL

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

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.**

Logging Out of Aurigo Engage

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

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. Figure 1. Sign Out**

Creating a Campaign

This feature enables you to create a campaign with project related information.Note: Ensure all the project fields are created in the Application Settings .

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	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 is open to the general public to provide feedback.**

Field	Description
END DATE	Select the end date of the campaign. The campaign ends on this date, and general public cannot provide feedback.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.
DESCRIPTION	Enter a description of the campaign explaining about the proposal and purpose of associated projects along with the supporting documents.

3. **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.**
4. **To add reference URLs to be displayed in the public portal, in the REFERENCE URLS section, click and add URL.**
5. **To add contact details to be displayed in the public portal, in the CONTACT INFORMATION section, click and provide the information in the fields as described in the following table.**

Field	Description
NAME	Enter the name of the contact.
DESIGNATION	Enter the designation of the contact.
CONTACT NUMBER	Enter the phone number of the contact.
EMAIL	Enter the email address of the contact.

6. **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.

Managing Your Plan

You can manage your plan by either upgrading or downgrading your current plan.

1. **In the Home page, click the initials of your user name at the top right corner of the page.**
2. **From the drop-down list, click Subscription Details . The Subscription Details page is displayed.**
3. **Click Manage Plan . The Choose your plan window is displayed. There are three types of plans available.**
   - **Basic**
   - **Professional**
   - **Ultimate**
4. **Click Buy Now to choose your plan.**

Deleting a Campaign

The campaign is in **DRAFT** status.

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

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.**

Downloading a QR Code

You can see and download the unique QR code of a campaign in the **All Campaigns** page.

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 Show QR Code option is not available for the campaigns in DRAFT status.**
3. **From the drop-down list, select Show QR Code . The QR code is displayed.**
4. **To download the QR code as an image, click . The QR code is downloaded as an image.**
5. **To download the QR code as a PDF, click . The QR code is downloaded as a PDF.**

Viewing the Subscription Details

You can view the subscription details on this page.

1. **In the Home page, click the initials of your user name at the top right corner of the page.**
2. **From the drop-down list, click Subscription Details . The Subscription Details page is displayed. On this page, you can view the CURRENT PLAN , PLAN START DATE , and PLAN EXPIRY DATE . Figure 1. Subscription Details Page**

Introduction

Read More

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Managing Projects in a Campaign

-
- **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.**

The campaign is in **DRAFT** status.

Campaign management enables you to organize projects in a seamless and systematic manner under an appropriate campaign. You can add projects one by one and import projects in bulk.

You can perform the following tasks:

- **Add projects to a campaign.**
- **Import projects to a campaign.**
- **Map project fields to be displayed on the public portal based on the requirement.**

1. **To add projects one by one, perform the following steps:**
   a. **In the Add Projects tab, click Add New Project . The Add New Project dialog box is displayed. Figure 1. Add New Project Dialog Box**
   b. **In the Add New Project dialog box, enter the required project details. Note: Only the Project Name field is mandatory.**
   c. **Click Save.**
2. **To import projects in bulk, perform the following steps:**
   a. **In the Add Projects tab, click Import Projects . The Upload File section is displayed. Figure 2. Upload File Section**
   b. **In the Upload File section, click to import the project details.**
   c. **Click Save . The File saved successfully message is displayed.**
   d. **In the Map Fields section, to ensure 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 .**
   e. **Click Save . The Add Projects list page is displayed.**
3. **In the Add Projects list page, perform the following steps as applicable:**
   - **To update a project, perform the following steps:**
     a. **The Edit Project Details dialog box is displayed.**
     b. **Edit the fields as per the requirement.**
     c. **Click Save.**
   - **To download the projects, perform the following steps:**
     a. **In the Project List page, click .**

        The Project List is downloaded as Excel file to your local system.
   - **To delete a project, perform the following steps:**
     a. **In the Project List page, click .**

        The confirmation dialog box is displayed.
     b. **Click Yes.**
4. **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 .**

In the **Project List** page, click .

Viewing the Transaction History

You can view the transaction history.

1. **In the Home page, click the initials of your user name at the top right corner of the page.**
2. **From the drop-down list, click Subscription Details . The Subscription Details page is displayed.**
3. **In the Transaction History field, click . The details of all the transactions are displayed. Figure 1. Transaction History**

Changing Password

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

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.**

Posting a Campaign on Social Media

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.

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. Figure 1. Promote Page**
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 URl 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. Figure 2. LinkedIn Post Preview Dialog Box Figure 3. Twitter Post Preview Dialog Box Figure 4. Facebook Post Preview Dialog Box**
9. **Click Post.**

Modifying User Preferences

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

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.**

Publishing a Campaign

The campaign is in **DRAFT** status.

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

1. **To display the fields in the public portal in the Select fields to display on Public Portal section, select the Show on Public Portal check box corresponding to the project field. Figure 1. Preview and Publish Tab**
2. **In the Preview & Publish tab, click Preview Public Portal to preview the portal. The Public Portal page opens in a new tab. Figure 2. Public Portal Page**
3. **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.**
   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.**
4. **In the Please preview before publishing the campaign: section, select the check boxes to confirm that all the details such as Campaign Details, Project List, Public Portal, and Comment Categories pertaining to the campaign are reviewed.**
5. **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.**
6. **Click Publish . A 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 .

Retrieving Password

You can retrieve your password from the login page.

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.**

Withdrawing a Campaign

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

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.

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.**
    - **For information on deleting a campaign, refer to Deleting a Campaign.**

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**

Rating and Sharing Comments for a Project

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

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.**

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.**

Searching a Project

You can search for projects in the Public Portal.

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.**

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**

Previewing a Campaign

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.

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

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.**

Viewing a Project

You can view the project details in the Public Portal.

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.**

Analyzing a Campaign by Comments

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

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:**
      1. **A detailed insight of all the positive comments is displayed.**
      2. **To view another comment type, click the tabs next to Comments Overview.**
      3. **To reply, select a comment and click Reply.**
   d. **To return to the CAMPAIGN BREAKDOWN page, click Back.**

Click the progress bar of **Positive** .

Responding to Comments

You can respond to a general public comment.

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.**

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**

Viewing and Downloading Reference Documents

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

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.**

Analyzing a Campaign by Projects

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

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.**

   .

Generating a Report

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.

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.**

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 .

Adding Form Fields

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**

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.**

Categories

The

Categories

section enables you to define the categories to segregate the user comments. There are 10 categories defined in the system by default. You can add and remove categories if needed. You can define a total of 15 categories. The changes you make to the categories are applicable to the campaigns that are published after making the changes and has no impact on the previously published campaigns.

If no categories are defined, then the **Category** column is blank in the **Comments** page, category widgets are not displayed in the **Analytics** page, and the comments are displayed without segregation by category in the **Category wise comments** report.

1. **In the Home page, click Settings and then select Application Settings . The Application Settings page is displayed.**

2. To add categories to segregate the user comments, in the Categories section, perform the following steps:
   a. Click . The field to enter category is displayed.
   b. In the field, enter the category and click outside the field to save the category automatically. You can add up to 15 categories to segregate the user comments.
3. To delete a category, in the Categories section, perform the following steps:
   a. Click . A confirmation message is displayed.
   b. In the confirmation dialog box, click OK . The category is successfully deleted.

Viewing Promotional Details

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.

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.**

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**

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.

Adding Users

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

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 .**

Adding Layouts and Fonts

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

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.**

General Settings

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

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.**

Printing a Report

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

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

Viewing Campaigns in Accepting Comments Status

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.

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.**
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.**

Deleting a User

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.

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.**

Managing a Template

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

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.**

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**.

Project Fields

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

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.**

Saving a Report

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

1. **Generate the appropriate report.**
2. **Click Download . Note: You can download only in .PDF or .xls formats.**

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.

Updating User Details

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

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.**

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.

Terms of Use Settings

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.

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.**

Viewing Campaigns in Draft Status

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

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 .**

User Management

The

Users

page enables you to perform the following tasks:

- **Add Users**
- **Edit Users**
- **Delete Users**