



Badger365 FAQ Web Part user manual

v1.1

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Introduction

Thank you for using the Badger365 FAQ web part for SharePoint! We're excited to introduce this web part into your office routine and make your work life more convenient and enjoyable. With this simple yet powerful web part, you'll be able to create elegant and effective FAQ sections that your users will love and rely on every day. Let's explore the key features that make this web part a household item for your team.

Key Features

Effortless setup and convenience

Get ready to streamline your FAQ creation process! With our FAQ web part, you can quickly set up a polished and organized FAQ section without any headaches. It's all about simplicity and convenience, helping you focus on what truly matters.

Seamless integration with existing lists

We understand the value and ease of use of your existing SharePoint lists, and that's why our web part smoothly integrates with them. You can easily select the most common column types for use in your FAQs, including multi-choice group fields and attachments.

Create new lists with ease

Whether it's a brand-new list or leveraging an existing one, our web part offers the flexibility you need. Creating a new list right from the web part is a breeze, providing you with a hassle-free experience.

Smart selection, less hassle

No need to waste time manually selecting questions, columns, and categories. The Badger365 FAQ web part automatically identifies common column names and automatically builds your FAQs, simplifying your workflow.

Multiple layout choices for your needs

Choose the layout that suits your content best. Whether it's a simple list, expandable sections, or a tabbed table, our web part empowers you to display your FAQs in the most user-friendly way.

Customization to match your style

Express your unique branding effortlessly! Our web part comes with various styling options, from borders to font sizes and styles, ensuring your FAQ section looks great and aligns perfectly with your site's design.

Use list views for easy management

No need to learn complex systems for managing your FAQs. Our web part uses common list views for filtering and sorting, enabling you to use the powerful out of the box way of working for SharePoint lists where it's most convenient.

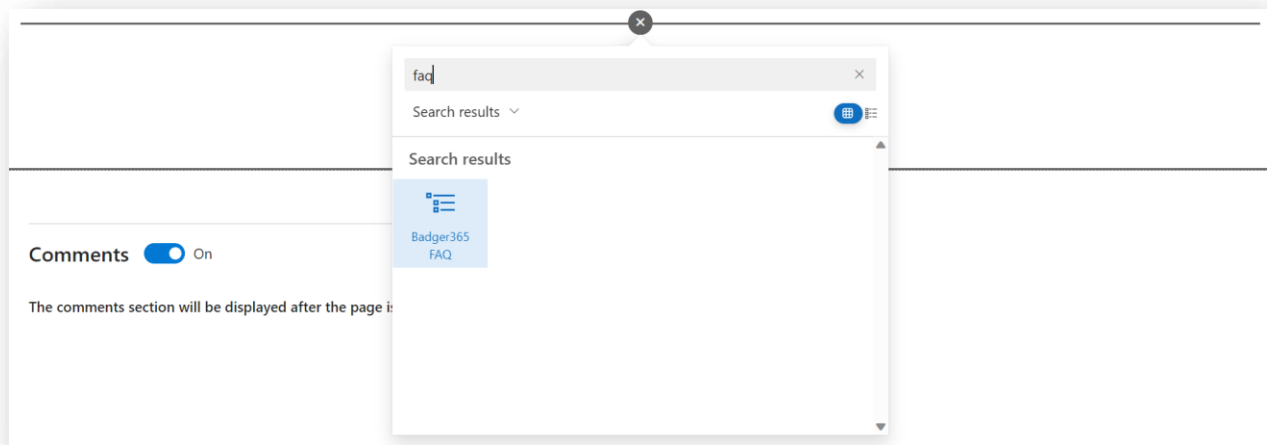
Fast and direct search functionality

Accessibility is key, and our web part delivers! With a swift search functionality, your users can find answers in a snap, making it a go-to tool for quick problem-solving.

Quick start

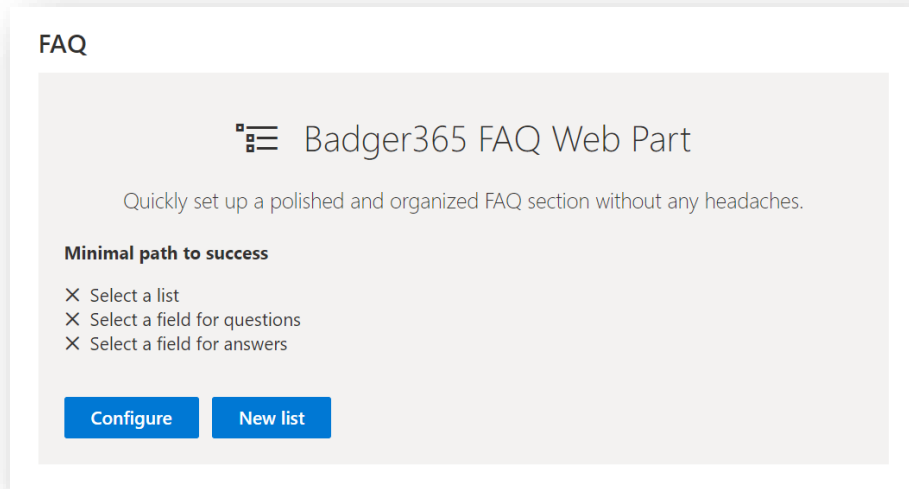
Adding the Badger365 FAQ Web Part to your page

1. **Sign in to your SharePoint Site** Start by signing in to your SharePoint site using your login credentials. Ensure that you have the necessary permissions to access and edit pages.
2. **Navigate to the page** Go to the page where you plan to add the FAQ section or where you want to check if the web part is already in use.
3. **Enter edit mode** Look for the "Edit" or "Edit Page" option, located in the top-right corner of the page. Click on it to enter edit mode and gain access to the page's editing features.
4. **Add a section (Optional)** If you already have a section on the page where you want to add the FAQ web part, you can skip this step. However, if you need to create a new section, click on the "+ Add a new section" button within the desired area of the page.
5. **Search for the FAQ web part** In the web part search box, type "FAQ". The search results will display web parts available for use on your site. Look for the Badger365 FAQ web part. If you see the FAQ web part listed, congratulations! It means the web part is available on your site and you can proceed to use it.



6. **Missing web part (Optional)** If the FAQ web part does not appear in the search results, it might not be available in your current SharePoint environment. In such cases, you can check with your SharePoint administrator or site owner

Once you have confirmed the availability of the FAQ web part on your SharePoint site, you're all set to create an engaging and user-friendly FAQ section that will enhance your users' experience. Enjoy the convenience, simplicity, and elegance of our SharePoint FAQ web part as it becomes a valuable addition to your site. Happy FAQ building!



Creating FAQs

With the Badger365 FAQ Web Part, you can start by creating a new list, or you can use one that is already on your site. Let's explore both options.

Starting from scratch: Create a new List

Once you've added the web part to a page, simply hit the 'New list' button to bring up the dialog menu.

1. From the Placeholder content, click on **New list** to open the New list form
2. Fill in a title for the new list

The image shows a dialog box titled 'Create a new FAQ list'. It contains the following fields and controls:

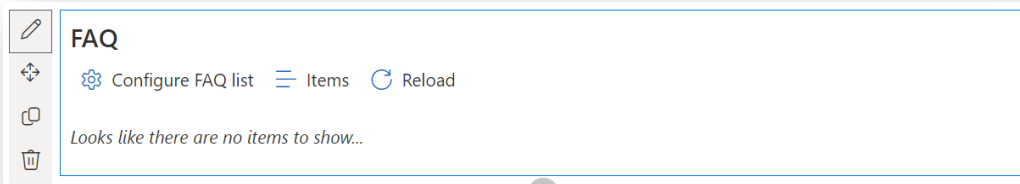
- List name ***: A text input field.
- Answer field name ***: A text input field with the value 'Answer' entered.
- Create a categories field**: A toggle switch that is currently turned off.
- Categories field name**: A text input field with the value 'Category' entered.
- Categories ***: A text area containing the word 'General'.
- Type each category on a separate line**: A small instruction text.
- Allow multiple selections for categories**: A toggle switch that is currently turned off.
- OK** and **Cancel** buttons at the bottom right.

Optionally:

- Change the name of the 'Answer field'
- Check '**Create a categories field**', this will enable form fields under it
- Type the categories you want to use in the **Categories** field. Each option goes on a new line.
- Check **Allow Multiple selections** if you want to be able to show questions in multiple sections.

- Click **OK** to create the new list and confirm the message.

Note: the default **Title** field of the list (a single line of text) will be used for the questions. You can change this later if needed.



To start adding questions, click on the *Items* button to open the new list's default view. Once you have added some items, click on *Reload* to refresh the web part and show the items.

To open the list settings, click on *Configure FAQ list*

To configure the look and feel of the web part, click on the *pencil icon* that appears on the left when you hover the web part with the mouse

Turn an existing list into an FAQ

Edit the web part properties to show the list selector.

- Open the *Select a list* dropdown selector to show the available lists on the site.
- Select a suitable list
- Check the Question, Answer and Categories dropdown selectors and change where needed.

Auto selection

The web part will recognize some column names and select them automatically. You can always change these selections later.

- The *Title* field will be set as Question.
- If there is a field named *Answer*, it will be selected in the Answer drop down.
- If there is a field named *Category* or *Categories*, it will be selected in the Categories drop down

Click on the *Items* button to open the default view of the selected list

Con on the *Configure FAQ list* button to open the list settings.

The screenshot shows the configuration interface for a 'Badger365 FAQ' web part. The interface is organized into several sections:

- Title:** A section with an upward arrow icon.
- Web part title:** A text input field containing the value 'FAQ'.
- List:** A section with an upward arrow icon.
- Select a list:** A dropdown menu that is currently empty.
- Items:** A button with a list icon and the text 'Items'.
- Configure FAQ list:** A button with a gear icon and the text 'Configure FAQ list'.
- Columns:** A section with an upward arrow icon.
- Question:** A dropdown menu.
- Answer:** A dropdown menu.
- Categories:** A dropdown menu.

Configuration options

This section describes the web part properties per page. Use the page selector at the bottom of the web part properties panel to browse to the next page

Page 1

Title

Web part title: The title displayed at the top of the web part

List

Select a list: the source list that provides the questions displayed in the FAQ

The fields below are only available if a list has been selected:

Items (button): opens the default view of the selected list

Configure FAQ list (button): opens the settings page of the selected list

Columns

The fields in this section are only available if a list has been selected:

Question: select the column that is used to display the question. You can only choose columns of type *Single line of text* here.

Answer: select the column that is used to display the answer. You can select *Single line of text* type columns or *Multiple lines of text* type columns here

Categories: the column that is used for grouping the questions. You can select columns of type *Choice* here. The category options are retrieved in the order they have been added to the list in the choice options

Display options

List style

- *List:* display items in one list of expandable questions
- *Grouped* (only available if a categories field has been selected): display items in expandable group sections
- *Tabbed* (only available if a categories field has been selected): display items in groups that can be selected from tabs at the top of the web part.

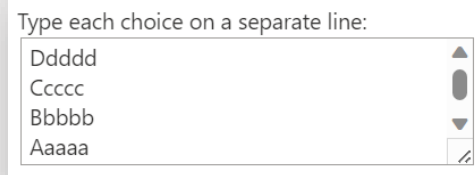
Filtering and sorting

This field is only available if a list has been selected and question and answer fields have been selected:

Use a view to filter and sort questions: If you want to show questions in a specific order, or filter out certain questions, you can create a view and select it here.

The default choice option '*None (retrieve all items)*', fetches all items to shows as questions in the FAQ.

Note: the order in which **categories** are displayed is determined in the list settings. Configure the FAQ list and edit the category column to set the order.



Type each choice on a separate line:

- Ddddd
- Ccccc
- Bbbbb
- Aaaaa

Page 2

Category styling

The options in this section are only available if the List style is set to Grouped in the Display options section on page 1.

Bold text: makes text of the group headers bold (sets font-weight to 650)

Large text: makes the text of the group headers larger (sets font-weight to large)

Border: draws a border around each group of questions

Collapse / expand: define the behavior when a group header is clicked and set the default

- *Collapse:* all groups are collapsed (closed) when the page is loaded
- *Expand:* all groups are expanded (opened) when the page is loaded
- *Harmonica:* all groups are collapsed (closed) when the page is loaded. When a group header is expanded, all other groups are collapsed

Answer styling

Bold text: makes text of the questions bold (sets font-weight to 650)

Large text: makes the text of the questions larger (sets font-weight to large)

Border: draws a border around each question

Attachments: if an item has attachment, they are shown below the answer if this setting is enabled.

Collapse / expand: define the behavior when a group header is clicked and set the default

- *Collapse:* all questions are collapsed (closed) when the page is loaded
- *Expand:* all questions are expanded (opened) when the page is loaded
- *Harmonica:* all questions are collapsed (closed) when the page is loaded. When a question is expanded, all other groups are collapsed

Layout options

Margin: the amount of space (in pixels) between various elements

Drop shadow: Show a shadowed border around the web part and centralize it relative to the section layout.

Show search box: show a search box at the top of the web part

Highlight expanded questions: change the background of expand questions to a light grey color to make them stand out

Pagination: show questions in sets of the selected size (*items per page*) and show a page selector to jump to the next set of questions. If the display style is set to *Grouped*, each group gets its own page selector.

Advanced

Remove inline styling from answers: remove any inline style attributes (e.g., `style="..."`) from the HTML code of the answer before rendering it to the page. It effectively strips any CSS styles applied directly to the element and leaves only the HTML structure intact.

Page 3

SaaS subscription

Subscription ID: If you have created a SaaS subscription, use this field to permanently remove the banner the shows on top of the web part when a list has been selected. Enter your Subscription ID and hit 'Validate' to check the subscription ID against Microsoft's Marketplace database and validate the web part. Once validated, you will never banner will disappear for good!

For more details on the SaaS offer, please check <http://www.badger365.com/saas>