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Q & A Builder

Editor Guide

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# Introduction

## Purpose of this document

The purpose of this document is to describe how content editors should set up and use the Q & A Builder tool.

## What is Q & A Builder

Q & A Builder is a tool within Umbraco that allows you to create a QABP (Q & A Builder Pathway) containing any number of questions and answers. You will be able to configure multiple paths through a QABP (Q & A Builder Pathway) which will be determined by the answers the user gives.

# Quick guide

All the following parts in this guide describe in detail everything you need to know about the Q & A Builder. This section is a quick step guide on how to create a QABP from start to finish.

## Creating a QABP

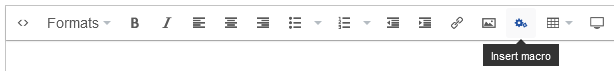
* Create a QABP (within the ‘Question Answer Builder Pathways’ or ‘Shared QABP pathways’ folders)
* Optionally create a start page
* Create a step
* Add question(s) to the step
  + If required, add conditional questions under the question(s)
  + Set the conditional triggers in the questions
* Repeat creating all the steps and questions required
* If required, create statement pages
* Create outcome(s)
* Go back and set destinations to all steps and statement pages

## Embedding a QABP

* Create a QABP node under toolkit or listing page

Or

* Click on the ‘Insert macro’ toolbar button in a Rich Text Editor field

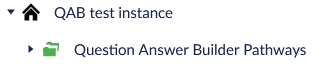


Then

* Select the QABP you wish to embed.

# Creating a Q & A Builder Pathway

QABPs can only be created in the ‘Question Answer Builder Pathways’ folder under the website homepage or in the ‘Shared QAB Pathways’ folder under the Shared content folder.





These QABPs can then be referenced by content editors from within a toolkit.

## QABP Settings tab

This tab has some editor notes and a Start Page property. At this point, you won’t be able to set the Start Page as you won’t have any child pages to select from. If nothing is set here, the first child node under the QABP will be considered the start page.

Once you have child pages under the QABP, you will be able to select any of them as the start page.

# Creating a content page

Content pages can be created directly under a QABP and can be used as a start page or a statement page.

## Page Contents tab

This tab is where you would set the main properties of the content page.

### Destination

This property allows you to control what page will be loaded when the user clicks on the Next button. You will only be able to set this after you have created another content page or a step. If this is left blank, clicking on the Next button will load the next page in the Umbraco tree structure.

### Hide Title

If you wish to hide the title on this page, tick this field. If not ticked, the node name will be used as the title.

### Content

This is where you would add any RTE content you wish to be displayed on the page.

## Content Sections tab

The content sections tab is where you can add content under an expanding section. This is like other content sections throughout the CMS.

### Top Content Sections

Any content sections added here will be shown above the Next button.

### Bottom Content Sections

Any content sections added here will be shown below the Next button.

# Creating a step

A Step will contain one or more questions as child nodes. Steps are where you would configure the destination of the Next button dependant on the answers given to those questions.

## Settings tab

### Hide Title

The node name is used as the title and is displayed above any questions. If you wish to hide the title, tick this field.

### Description

This is an optional description RTE field, which is displayed above any questions.

## Response tab

This tab is where you would set the destinations for the Next button based on the value of the answer(s) the user selects.

On initial creation of a step, you probably won’t know the possible answers to questions so you should come back to this tab once you have created all your questions. You will also need to have created the next step to set your destinations.

**Hint**: When you do come back here, it might be helpful to have another browser tab open where you can view the questions and the possible answers.

If the question(s) in the step are optional, you must include a destination where the value 0 is matched.

To add a destination, click on the ‘Add Response Destination’ button. This will open a slide out page where you can set the properties of the destination.

### Label

This label is used in the list of destinations to make the editor experience clearer. E.g., set this to something that will remind the editor of the rationale for the destination.

### From and To

These fields determine the range of values where the destination is used. The value range in each destination corresponds to the sum of the values assigned to relevant answers in a step. The from value must be less than or equal to the ‘To’ value.

### Destination

When the sum of the selected values of the step question(s) match the configured range, this is the next step that will be loaded. You will be able to select a content page, step, or outcome page from the same QABP or you can select another QABP.

# Creating questions

Questions are created directly under a Step and can be either Radio/Dropdown, Checkbox, or Power of 2 (checkbox). More information can be viewed in the notes section of each of these question types when created in Umbraco.

If you create multiple questions for the same step, you must take care to make sure the values are unique and that the possible total value of the selected answers has a corresponding destination set in the step. Otherwise, there is a risk of conflicting destinations in the Step’s response tab.

## Question tab

### Type

Use this field to identify the question as a radio button or dropdown list question. This is only available in the Radio/Dropdown Question document type.

### Is Mandatory

Setting this to true will force end users to answer the question. If false, the question can be skipped by the end user.

### Is Mandatory For Calculation

If the question is not mandatory to proceed but is mandatory to perform calculations at the end of the QABP, then this field should be set to true. If true, the end user can ignore the question and still proceed (if the Is Mandatory field is false) but the calculation will not be performed at the end.

### Hide Title

If set to true, the title of the question will be hidden. If false, the question node name is shown as the title and is shown under the step title and description if set.

### Description

This field allows you to give more information related to the question to help the end user.

## Answers tab

This is where you can set up all possible answers to the questions. You can use the Add content button to add new questions and all questions can be dragged to reorder them.

### Include ‘None of the above’ option

This field is only available for Checkbox questions and will include an option for the end user to select ‘None of the above’.

### None of the above label

If you the previous option is set to true, you can override the default label of ‘None of the above’ with something more relevant to the question.

### Add content

This button will provide you with the option of adding an Answer or Answer Group to the list.

Answer groups allow you to split answers up with headings. E.g., If you have a set of answers relating to your arm, you could have Shoulder, Elbow, Wrist as possible answers. If you also had to separate them by left or right, you could have Left Shoulder, Left Elbow, Left Wrist, Right Shoulder, etc. Or you could have an Answer Group with the label of Left above Shoulder, Elbow, Hand. Then you could have another Answer Group with the label of Right above another set of Shoulder, Elbow, Hand answers. The Left and Right labels would only be shown above the answers bellow it in Umbraco.

This example is quite crude, but it demonstrates how grouping works.

### Group Label

If you choose to add an Answer Group after clicking on the Add content button, the value of this field will be shown above any answers that follow.

### Value

A numeric value assigned to this answer. If the question is optional, you should not use 0 as a possible answer value as this should indicate nothing being selected.

If you have created multiple questions in the same step, you should take care when setting the values as the answers to all questions will be added together. So, if you have 1, 2, 3 for the first question and have 1, 2, 3 for the second question, it is possible to answer both questions and have a total of 2, 3, 4, 5, or 6 (where it is radio/dropdown questions). Sometimes this will be fine, but it is more likely that you would want unique values in each of the questions so that you have more control over the possible destinations within the step.

### Label

The label shown to the end user for this answer. This field allows for limited formatting to be applied.

### Conditional Trigger

If you have added any conditional questions under this question, this is where you would set the trigger to show that conditional question. You will have to create the conditional question(s) then return to the triggering question to set the conditional trigger.

A conditional trigger can only point to a conditional question under the question where you are setting the trigger.

Conditional questions and triggers are only available under Radio/Dropdown question types.

# Creating outcomes

Once a user has completed all questions in a QABP, they will be taken to an outcome page. Outcome pages are like content pages but with some additional options and content.

## Page Contents tab

### Hide Title

If you wish to hide the title on this page, tick this field. If not ticked, the node name will be used as the title.

### Content

This is where you would add any RTE content you wish to be displayed on the page.

## External Services tab

### Enable Copy to clipboard

If you wish to allow the end user to copy the QABP answers to their clipboard, set this field to true.

### Enable Save as PDF

Setting this field to true will give the end user the option of saving the QABP answers to a PDF which they can download.

### PDF Logo

If you wish to include a logo at the top of the generated PDF, add it to this field.

### PDF Header

This RTE field is where you can add any content you wish to be included at the top of the generated PDF.

### PDF Footer

This RTE field is where you can add any content you wish to be included at the bottom of the generated PDF.

### PDF Data Form

This is where you can specify data collection fields for the end user to fill in. Any information the end user adds to these fields on the outcome page will be included in the generated PDF.

### Add PDF Data Form

This button will begin the process of setting up a data collection form.

### Title

This title field will be shown at the top of the data collection form.

### Description

If you wish to include more information related to the form, do so with this field.

Fields

This is where you can build up one or more fields for the data form.

### Add content

Clicking on this button will give you the option of adding a short or long text field to the form. A short text field is a single line text field, while a long text field is a multi-line text field.

### Name

The name field will be shown as the label in the form.

### Description

This field will be shown under the label and can give more information to the user.

### Is Mandatory

If the user must provide a value for this field, set this to true.

# Embedding an existing QABP

A QABP can be embedded as page under a toolkit, under a listing page, or in a content page.

## Under toolkit or listing page

To embed a QABP under a toolkit or list page, you should create an instance of a Question Answer Builder Pathway by selecting the following item from the list of creatable nodes.

Text

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### Content tab

This is where you will select the QABP you wish to embed.

### Add content button

Clicking on this button will give you the option of selecting a QABP or a Shared Library QABP.

The QABP option will show a list of QABPs that exist in the Question Answer Builder Pathways folder under the website homepage.

The Shared Library QABP option will show a list of QABPs that exist under the Shared content/Shared QAB Pathways folder.

### SEO Settings tab

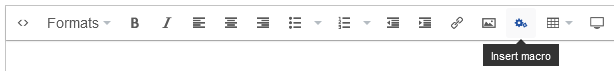
This tab is the same as other SEO settings tabs throughout the CMS.

### Page Settings tab

This tab is the same as other Page settings tabs throughout the CMS.

## In a content page using a macro

To embed a QABP in a content page, you will use the macro toolbar button in the Rich Text Editor.



After clicking on the button, select the Question Answer Builder Pathway macro, which will then allow you to select the QABP you wish to embed.

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