

SharePoint solutions to frequently asked questions

One of the exercises to do while preparing for a SharePoint rollout is to think about how it can be used to answer questions that would otherwise fill up email or voice mail. A well-built company-facing team site should be a reliable resource for frequently asked questions (FAQ).

With a few tweaks, the Issues List app (or list template in 2010) can serve two functions: a place to record open issues or questions, and, when answered, an FAQ.

The setup

For SharePoint 2010:

1. Site Actions
2. More Options
3. Select the Issue Tracking list
4. Name it and enter a description
5. Click Create

For SharePoint 2013/SharePoint Online

1. Click the Settings gear
2. Add an app
3. Select the Issue Tracking list
4. Click Create

In either version, click the List tab in the ribbon and then the List Settings button. Scroll down until you see the Columns section. You'll modify a few columns here and add one.

- In the Category column, you can identify categories that people would likely be looking for to find answers. For example, Travel Expenses, New Vendor Set-up, Petty Cash.
- Add a new Yes/No column and name it FAQ. Not every issue will rate inclusion in the FAQ. Those that do will be included via a filter on this column. Be sure to set the default value to No.
- Change the name of the Title column to Question, and the Comments to something like Answer or Resolution.
- Decide whether you want to keep Related Issues and Due Date. If not, you may delete these columns from your list.

The process

As site visitors enter new issues and they are resolved by your team, periodically review them to determine if they are good candidates for the FAQ. Click the check box for those that are good candidates. Make sure to refine the Question, Description and Resolution/Answer fields so they will be useful as a reference resource.

Creating the FAQ view

Now, enable the FAQ. On the List tab, click the Create View button. Name it Frequently Asked Questions or FAQ. Arrange the view so that it can be logically filtered to find an answer. For example, Show Category as the first column, then Question, then Resolution/Answer. In the Filter section, choose the FAQ column and the requirement that it be equal to Yes. You might want to consider creating a separate FAQ page showing this list with the default view set to the FAQ view you just created.