KNOWLEDGE BASE ARTICLE

# How to Build an Internal Q&A Forum for Your Intranet with Discussions

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# Overview

The same questions reach the IT help desk and the HR team again and again: "How do I connect to the VPN?", "When is the deadline for the vacation request?", "Which laptop can I order?". A question-and-answer forum on the intranet turns those one-to-one e-mails into answers that everybody can find. This article walks through building such a forum with Discussions: a board in Q&A mode, categories that match the way people ask, the *Unanswered* **view** as the default so that nothing is left behind, experts who follow the board, and a block on the home page that shows the latest questions.

The scenario below uses an IT help desk; an HR forum, a finance desk or a facilities board is built in exactly the same way.

**Note**

Before you start, the Vitextra Discussions package must be deployed in the **tenant** (see KB10035. How to Install a Vitextra Product in SharePoint Online), and the person creating the board needs the *Manage Lists* permission on the **site** - site owners have it. The product requests no API permissions, so no **admin consent** is involved.

# Step 1. Plan the board

Decide three things before you open the page editor:

- **One board per audience.** A board is a self-contained forum with its own mode, categories and moderation setting. Give the IT help desk its own board and HR another one; several boards can share one site, each on its own page. Boards on the same site share permissions. Use separate sites when access must differ.
- **Categories that match the questions.** Categories are the filter people use to narrow the **list** and the hint they get when posting. For an IT help desk a good first set is *Accounts and passwords*, *Laptops and hardware*, *Software*, *VPN and remote work*, *Microsoft 365*. Keep the list short; it can be changed later.
- **Who answers and who moderates.** Members need a permission level such as *Contribute* to post and interact. Users with *Manage Lists* are moderators; the standard *Edit* level includes this permission, so default site members may also moderate. Use *Contribute* for ordinary participants and a group with *Manage Lists* for designated moderators.

# Step 2. Create the board in Q&A mode

1 Open the intranet page where the forum should live, switch it to edit mode and add

the **Discussions web part** (group *Communication and collaboration*).

2 The web part shows the *Not Configured* placeholder with the board setup form. Under **Board**, keep **New board** selected.

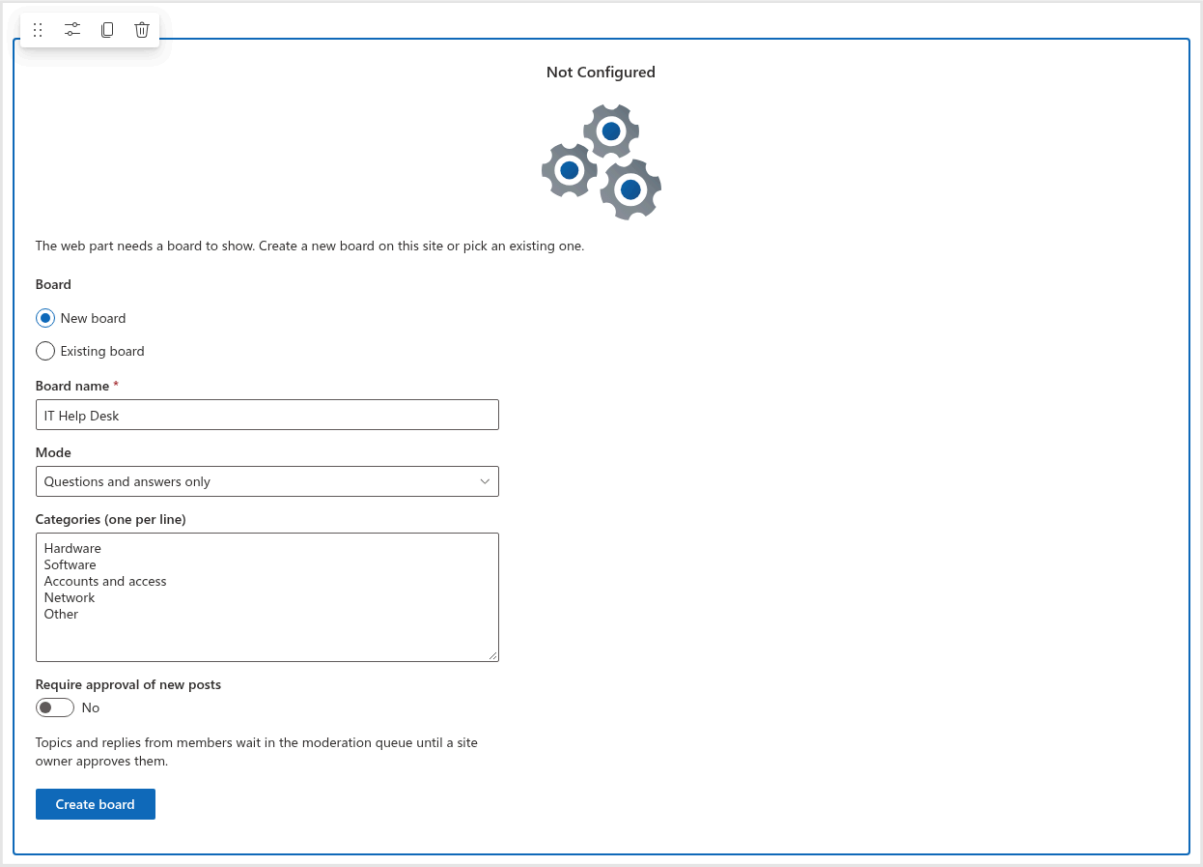
3 Enter the **Board name**, for example *IT Help Desk*.

4 In **Mode**, choose **Questions and answers only**. In this mode every new topic is a question, and the **Unanswered** and **Answered** views are available.

5 In **Categories (one per line)**, type the categories from your plan, one per line.

6 Leave **Require approval of new posts** at **No** for a help desk: questions should appear immediately. Switch it to **Yes** if your organization wants a moderator to see every post before it goes live. Moderators' own posts are published immediately.

7 Click **Create board**. The web part creates the site lists on first use - *Discussions Boards*, *Discussions Topics*, *Discussions Posts*, *Discussions Subscriptions* and the *Discussions Assets* library - and opens the empty board.



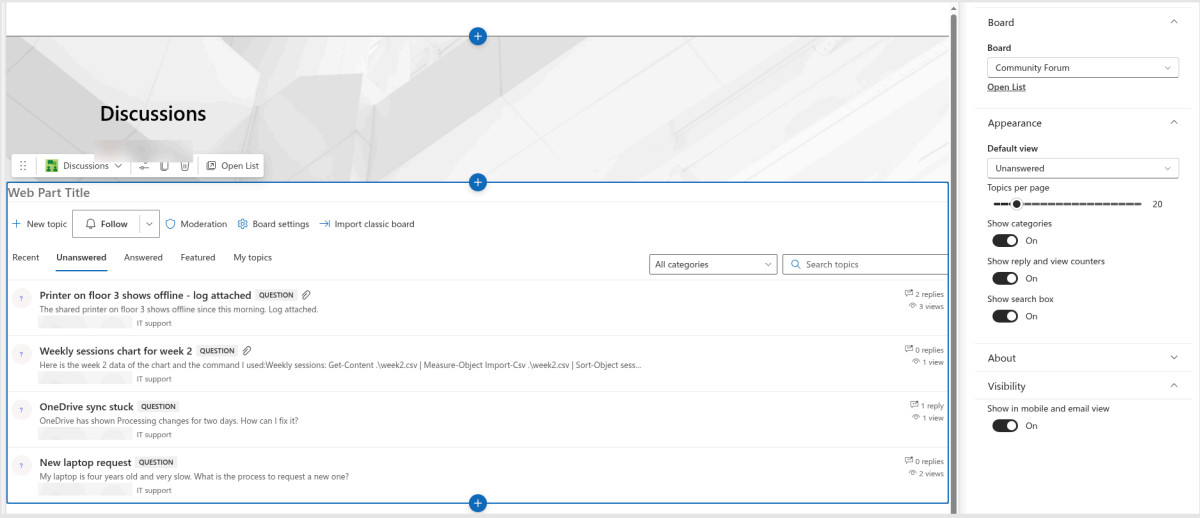

*Creating the help desk board in Q&A mode*

The details of every option are in KB10392. Creating Your First Board: Modes, Categories and Approval.

## Step 3. Make unanswered questions the default view

A help desk forum works when open questions are the first thing an expert sees. Open the property pane of the web part (the pencil icon) and, in the **Appearance** group:

- set **Default view** to **Unanswered** - the list opens with the questions that have no accepted answer yet; visitors can still switch to *Recent*, *Answered*, *Featured* or *My topics*;
- set **Topics per page** to a value that fits the page (the default is 20; more are loaded with **Load more**);
- keep **Show categories**, **Show reply and view counters** and **Show search box** switched on, so people can filter by category, see which questions are busy and search topic titles.




*The Unanswered view as the default view of the board*

Publish the page. Every setting of the web part is described in KB10422. Views, Paging, Search and Counters: Display Settings of the Discussions Web Part.

## Step 4. Ask the experts to follow the board

Experts should not have to open the page to learn about a new question. Each of them opens the board and clicks **Follow** in the command bar. The button follows the board with the *Immediately* frequency; the drop-down part of the button switches to **Daily digest** or **Weekly digest** or offers **Unfollow**. The button then reads *Following · Immediately*.

Two more rules work in your favor:

- the person who asks a question **follows it automatically**, so they learn when an answer arrives;
- an expert can be pulled into a specific question with an **@mention** in a reply.

**Warning**

The web part keeps the subscriptions and the mentions in the site lists; the e-mails themselves are sent by a **Power Automate** flow that a site owner sets up on top of those lists. The contract for that flow - which events, which recipients, which frequency - is described in KB10414. How Notifications Work in Discussions: Subscriptions, Mentions and Power Automate. Until the flow is in place, following a board records the subscription but does not send mail.

## Step 5. Answer and mark the best answer

An expert opens the question, writes the answer in the reply editor - with formatting, links, screenshots pasted into the text and attached files where needed - and clicks **Post**. If the answer solves the question, the author of the question or any moderator clicks **Mark as answer** under the reply. From that moment:

- the reply carries the *Accepted answer* badge and is shown at the top of the thread, whatever its date;
- the question gets the *Answered* badge, leaves the **Unanswered** view and appears in **Answered**; the state follows the accepted answer, so it survives locking the question, and deleting the accepted reply returns the question to **Unanswered**;
- the mark can be removed with **Unmark answer**, and a different reply can be accepted instead - a question has one accepted answer at a time.

Only top-level replies can be accepted; a reply to a reply is a comment on that answer, not an answer of its own. How this looks for the person asking is described in KB10400. Marking the Best Answer in Q&A Topics.

**Tip**

Ask designated moderators among the experts to mark a top-level reply as the answer when the question author does not return. Ordinary contributors cannot accept an answer to someone else's question. Keeping solved questions out of *Unanswered* helps the next person seeking help.

## Step 6. Show the latest questions on the home page

The forum should be visible where employees already go. Add the **Discussions Activity** web part to the intranet home page and, in its property pane:

- under **Board**, pick the help desk board, or leave **All boards** to mix the latest topics of

every board on the site;
- in **Board page URL**, enter the address of the page with the Discussions web part - the titles then link to the topic (`?topic=ID`) on that page;
- in the **Appearance** group, set **Maximum items** (five by default) and keep **Show board name** on when several boards are shown.

Each topic is shown with the board name, the author, the time of the last activity, the number of replies and the *Answered* badge for solved questions. While there are no topics, the web part hides itself in read mode. See KB10415. Showing Recent Discussions on Any Page with the Discussions Activity Web Part.

## Keeping the forum healthy

A few moderator habits keep a help desk board useful as it grows:

- **Pin the evergreen answers.** Open a question that everybody asks - "How do I reset my password?" - and click **Pinned**; pinned topics appear first among topics that match the current view and filters. Click **Featured** to add it to the *Featured* view that works as a curated FAQ.
- **Lock what is settled.** When a question is answered and the thread starts drifting, click **Locked**: the topic remains readable, but new replies are not accepted. A locked question keeps its *Answered* badge and its place in the **Answered** view; **Mark as answer** and **Unmark answer** are hidden while the topic is locked, so unlock it first if the answer has to change. See KB10410. Pinning, Featuring and Locking Topics.
- **Watch the moderation queue.** The **Moderation** button opens the queue with the posts that wait for approval (if approval is on), the posts that members have reported and the posts that were rejected. Approve, reject, dismiss the reports or delete.
- **Adjust the categories.** Click **Board settings** in the command bar of the board - the button is shown to moderators - and change **Categories (one per line)**; **Save** applies the change immediately. The board name, the description, the mode and the approval setting are changed in the same panel. Topics that already use a renamed category keep the old name; the author or a moderator moves such a topic with **Edit** in the topic view - see KB10423. Organizing Topics with Categories.
- **Share links to answers.** Every topic has an address with `?topic=ID`; a help desk agent can answer an e-mail with a link to the ready answer.

# Terms

**Admin Consent**
Admin consent is the approval by a tenant administrator that grants an application the permissions it requests on behalf of all users in the organization. It is required for application permissions and for delegated permissions that are high-privilege or that the organization restricts.

**List**
A list is a storage unit in SharePoint. A list can contain columns of different types, content types, and views. A document library is a special type of list and therefore inherits the functionality of a list.

**Power Automate**
Microsoft Power Automate is a cloud-based service that allows users to create automated workflows between applications and services. It enables the automation of repetitive tasks and processes, such as data collection, notifications, and approvals, without the need for extensive coding knowledge.

**Site**
A SharePoint site is a container for information within the SharePoint platform. Sites typically offer features such as document libraries, lists, calendars, discussion boards, and workflows, facilitating collaboration, communication, and document management within teams or across departments. Sites can be customized and configured to suit the specific needs and workflows of an organization.

**Tenant**
A Microsoft 365 tenant is a dedicated instance of Microsoft 365 services. The tenant holds the organization's information, such as users and domains (Microsoft Entra ID), configurations, subscriptions, and services. An organization receives a tenant by signing up for Microsoft 365 services.

**View**
A view is a saved configuration that determines which items of a list or library are displayed and how, including the columns, sorting, filtering, grouping, and layout. Views can be personal or public.

**Web Part**

# Terms

A web part is a primary building block of functionality or content placed on a SharePoint page. Some web parts support customization, such as configuring the web part or changing its appearance.