



SharePoint Knowledge Base Template

Site structure, library and column schema, content types, page layouts and review cadence for a knowledge base built in SharePoint Online.

How to use this template

Build it in the order the sections appear. The site and library structure come first, the columns and content types second, the page layouts third, and the review cadence last. Skipping to page layouts first is how most knowledge bases end up as a pile of pages with no way to find or retire them.

- Use one communication site as the knowledge base. Do not spread knowledge across department team sites.
- Every knowledge item is a SharePoint page with metadata, except controlled policy PDFs, which live in one library with the same columns.
- Three content types only: FAQ, SOP and Policy. Add a fourth only when you can name an owner and a review cadence for it.
- Every item has a named owner and a review date before it is published. No exceptions on launch day.
- Columns use the exact internal names in the schema so Power Automate flows, views and search refiners keep working when the display name changes.

What this template is not

It is not an intranet home page. The knowledge base is one site inside the intranet hub, and the intranet home page links to it. It is also not a document management system. Project files, contracts and working documents belong in their own sites with their own libraries.

1. Site structure

One communication site, associated to the intranet hub. Navigation is built around what employees are trying to do, not around the departments that own the content. Department ownership lives in metadata, not in the menu.

Site element	Setting	Why
Site type	Communication site, associated to the intranet hub	Broad read access, controlled authoring, hub navigation and search scope
Site name and URL	Knowledge Base, /sites/kb	Short URL survives renames and fits in a Teams tab
Permissions	Visitors: all staff. Members: knowledge authors group. Owners: KB admin group (2-4 people)	Authors cannot change structure; owners cannot be a single person
Site Pages library	Holds every FAQ, SOP and knowledge article as a page	Pages are searchable, mobile-friendly and support Copilot grounding better than documents
Policies library	Document library for controlled policy files, same columns as pages	Policies that must be a signed or versioned file still carry the same metadata
Knowledge Owners list	List of owner names, backup owners, and the area they own	One place to change an owner when someone leaves
Retired archive	Separate site or library excluded from search, retention applied	Retired content leaves search results on the day it is retired

Top navigation (task-based, six items maximum)

Nav item	Filters to	Example audience question
Get help with IT	Topic = IT, Knowledge type = FAQ or SOP	How do I reset my password?
HR and benefits	Topic = HR	How many days of leave do I have?
Policies	Knowledge type = Policy	What is the travel policy?
How to do things	Knowledge type = SOP	How do I submit an expense?
Find an owner	Knowledge Owners list	Who maintains the onboarding guide?
Ask a question	Form or Teams channel for unanswered questions	Nothing here answers my question

Topic, Audience and Knowledge type are site columns, so every navigation item is a filtered view and never a separate folder or library.

2. Column schema

Create these as site columns in one site column group named Knowledge Base, then add them to the three content types. The internal name is what flows, views and search refiners reference. Set it once and never rename it.

Display name	Internal name	Type	Required	Values or notes
Knowledge Type	KBType	Choice	Yes	FAQ; SOP; Policy
Topic	KBTopic	Managed metadata	Yes	Term set: IT, HR, Finance, Facilities, Operations, Sales, Legal, Safety (edit to fit)
Audience	KBAudience	Choice (multi)	Yes	All staff; Managers; New hires; Field staff; Contractors
Owner	KBOwner	Person	Yes	One person, not a group. Backup lives in the Knowledge Owners list
Review Date	KBReviewDate	Date	Yes	Set at publish. FAQ 6 months, SOP 12 months, Policy 12 months or on regulatory change
Last Reviewed	KBLastReviewed	Date	No	Set by the review flow when the owner confirms the content
Status	KBStatus	Choice	Yes	Draft; Published; Under review; Retired
Summary	KBSummary	Multiple lines (plain)	Yes	One to two sentences. This is what search and Copilot quote
Keywords	KBKeywords	Multiple lines (plain)	No	Words employees use that the title does not. Example: 'PTO, vacation, time off'
Related Policy	KBRelatedPolicy	Lookup to Policies library	No	Connects an SOP or FAQ to the policy it implements
Source System	KBSourceSystem	Choice	No	ServiceNow; Workday; Dynamics; None. Tells the reader which system the answer lives in
Effective Date	KBEffectiveDate	Date	Policy only	Date the policy took effect
Policy Version	KBPolicyVersion	Single line	Policy only	Matches the version printed on the document
Approved By	KBApprovedBy	Person	Policy only	Set by the approval flow, read-only to authors

Columns to leave out: department (ownership is a person, not a department), free-text category (use the Topic term set), and anything that duplicates Modified By. Each extra required column cuts the number of people willing to publish.

3. Content types

Three content types, each inheriting from Site Page (or Document for the Policies library). The page template attached to each content type is what keeps articles consistent, so authors fill in sections instead of inventing a layout.

Content type	Parent	Columns	Review cadence	Page template
KB FAQ	Site Page	Core set	6 months	FAQ layout (section 4)
KB SOP	Site Page	Core set + Related Policy + Source System	12 months	SOP layout (section 4)
KB Policy	Site Page and Document	Core set + Effective Date + Policy Version + Approved By	12 months or on change	Policy layout (section 4)

Core set = Knowledge Type, Topic, Audience, Owner, Review Date, Last Reviewed, Status, Summary, Keywords.

4. Page layouts

Each layout is a SharePoint page template saved in the Site Pages library. The first section is always the answer. Context, exceptions and history come after it. That order is what makes the page useful in search results, in Copilot answers and to someone reading on a phone.

FAQ page layout

Section	Web part	Content rule
Title	Page title	Written as the question employees ask, in their words. 'How do I reset my password?' not 'Password reset procedure'
Answer	Text	Two to four sentences. The complete answer with no preamble
Steps (optional)	Text, numbered list	Only when the answer needs more than one action
Where this applies	Text	Audience, locations, exceptions
Related	Quick links	Two to five related FAQs, SOPs or the governing policy
Owner and review	Page properties	Shows Owner, Last Reviewed and Review Date so readers can judge freshness

SOP page layout

Section	Web part	Content rule
Title	Page title	Verb first. 'Submit an expense report'
Purpose and scope	Text	One paragraph. Who does this, when, and what it produces
Before you start	Text, bulleted	Access, approvals, information needed
Steps	Text, numbered list	One action per step. Screenshots only where the screen is confusing
Exceptions	Text	What to do when the standard path does not apply
Governing policy	Quick links or Page properties	Pulls from Related Policy column
Owner and review	Page properties	Owner, Last Reviewed, Review Date, Source System

Policy page layout

Section	Web part	Content rule
Title	Page title	Policy name as it appears on the controlled document
Plain-language summary	Text	What the policy requires, in three to five sentences. This is what most employees will read
Who it applies to	Text	From the Audience column, stated in words
Key requirements	Text, bulleted	The rules, not the rationale
Full policy	File viewer or Document link	The controlled PDF from the Policies library, current version only
Related procedures	Quick links	SOPs that implement this policy
Version and approval	Page properties	Policy Version, Effective Date, Approved By, Review Date

5. Review cadence and retirement

A knowledge base stays trusted when review is automatic and retirement is quick. Both run on the Review Date and Status columns, so the flows are simple and survive staff changes when they run under a service account with two co-owners.

Trigger	Action	Who
Review Date is 30 days away	Flow emails the Owner with the page link and a one-click 'Still accurate' confirmation	Service account flow
Owner confirms	Flow sets Last Reviewed to today and advances Review Date by the cadence for the content type	Flow
Review Date passes with no response	Status set to Under review. Page shows a banner. Reminder goes to the backup owner from the Knowledge Owners list	Flow
30 days past Review Date, still no response	KB admins notified. Page moves to Retired unless an owner intervenes	KB admin group
Status set to Retired	Page moved to the retired archive, removed from navigation, excluded from search	Flow
Owner leaves the organization	HR offboarding step reassigns every item in the Knowledge Owners list before the account is disabled	HR and KB admin

6. Views the admins need

- Due for review: Review Date within 30 days, grouped by Owner
- Overdue: Review Date in the past, Status not Retired, sorted oldest first
- No owner: Owner is empty (this view should always be empty)
- By topic: grouped by Topic, filtered to Published, for spotting thin areas
- Recently retired: Status = Retired in the last 90 days, for catching mistakes

7. Launch checklist

- Site created, hub-associated, permission groups populated with at least two owners
- Site columns created with the internal names in section 2, in the Knowledge Base group
- Three content types created and added to Site Pages and Policies
- Three page templates saved and tested by someone who did not build them
- Topic term set populated and agreed with the content owners
- Knowledge Owners list filled in, every owner has a backup
- Review and retirement flows running under a service account with two co-owners
- First 30 items migrated and tagged, every one with an Owner and Review Date
- Search tested with ten real employee questions before announcing the site
- Intranet home page links to the knowledge base from the first screen

Template by dataBridge, a SharePoint-first Microsoft 365 consulting firm. For the reasoning behind each decision, see the SharePoint knowledge base design guide at getsharepoint.com.