KNOWLEDGE BASE ARTICLE

List Filter Online. Web Part Configuration

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Table Of Contents

The Vitextra List Filter Online web part allows users to filter data and retrieve results from a SharePoint list or document library. This article will describe the main features of the web part and how to configure it.

Web Part Overview

The List Filter Online web part is a powerful tool that helps users quickly and easily find the information they need within **lists** and **document libraries** in SharePoint. It provides a robust filtering system that allows users to narrow down search results based on various criteria, such as date, author, or content. The intuitive interface makes it easy for users to customize the view options to suit their preferences, enhancing productivity and efficiency.

With this web part, users can sort through large datasets and search for specific documents with ease. This makes it easier to access the information that's most relevant to their workflow, saving time and increasing productivity. Whether you're working on a project or just trying to find a specific document, the List Filter Online web part can help you get the job done quickly and efficiently.

Key Features

- Display data from other sites
- Query Builder to create a complex **CAML** queries
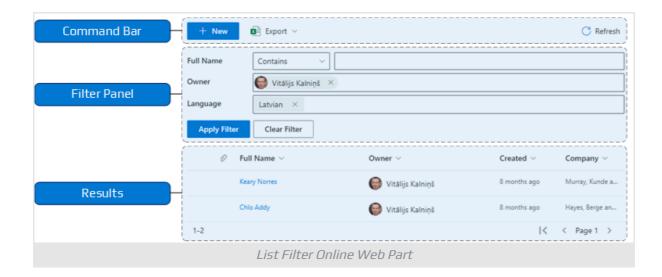- Filter Panel to search relevant information
- Export to Excel

> ⚠️ **Warning**
>
> The List Filter Web Part does not support selecting an existing view. Instead, you will need to select the columns that you want to display in your web part.

Web Part Layout

The web part combines three main elements: a **command bar**, a **filter panel**, and a **results** table. The results from the web part are always displayed and cannot be hidden, unlike other parts of the application.

List Filter Online Web Part

> 📝 **Note**
>
> List Filter Online cannot be linked to other web parts, but it can be used as a tool to filter data.

API Permissions

The List Filter Online web part uses the native SharePoint **REST API** to retrieve data from lists and document libraries. This means that it does not require any additional permissions to be granted in order to use it, so it can be deployed immediately.
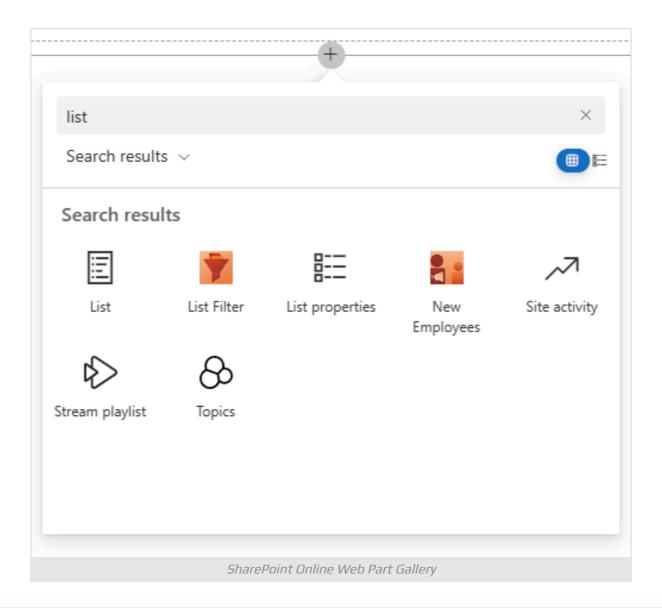
> 📝 **Note**
>
> The List Filter Online web part does not require API permissions to be granted. It is ready to use immediately after deployment.

Web Part Configuration

After deploying the package the List Filter Online web part will be available in the **web part gallery**.

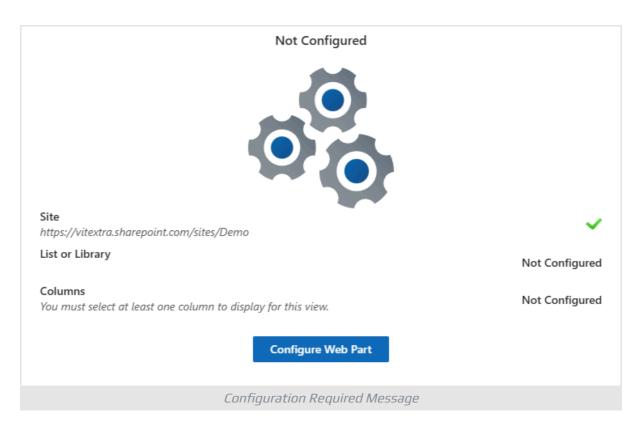*SharePoint Online Web Part Gallery*

> 💡 **Tip**
>
> Please refer to the relevant knowledge base article to deploy the web part in your environment: KB10035. Installing Cloud-based Product

Once you have added the List Filter web part to a page, you will see the following alert:

Configuration Required Message
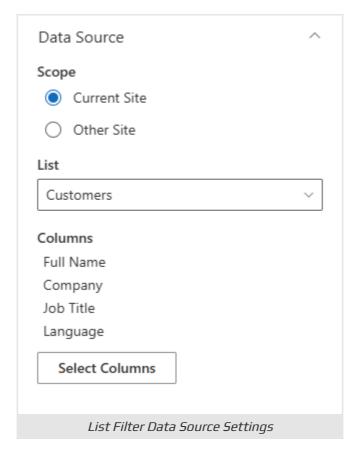
You need to provide three required parameters:

1 **Site**. The **SharePoint Site** in the current **Site Collection** that contains the list from which you want to display data.
2 **List or Library**. List or Library: The list or library that contains the data you want to retrieve and display.
3 **Columns**. The set of columns you want to include in the list view.

To configure the web part, click on the "Configure Web Part" button to open the configuration panel.

Data Source

The first section allows you to specify the necessary parameters for displaying data. The web part enables you to display information from any SharePoint site.
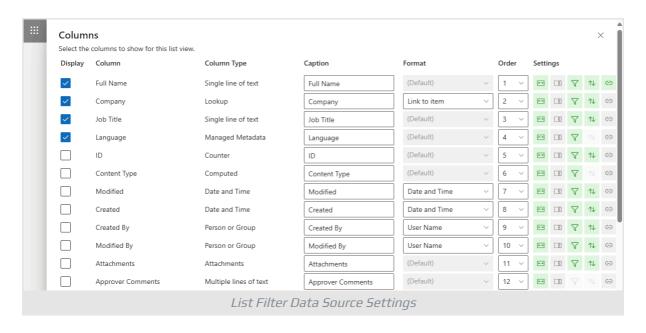
List Filter Data Source Settings

To choose a site from which to retrieve data, please enter the URL or name of the website into the search bar and select it from the list of suggested options. After selecting a site, you can choose a specific list or document library within that site.

Columns

The last required parameter is a list of columns to be displayed in the list view. To do this, click on the **Select Columns** button to open the column options panel.

List Filter Data Source Settings

⚠️ **Warning**

The List Filter Web Part does not support selecting an existing view. Instead, you will need to select the columns that you want to display in your web part.

Columns Display Options

For each column in the listview, you can set a caption, order, and other settings to control how the column behaves.

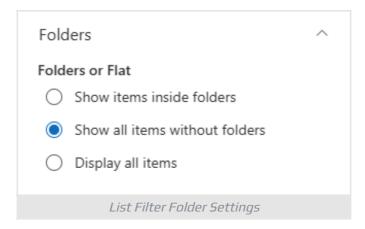| Icon	Name	Description
←→	**Resizable**	Allow users to resize column
[ ]❘	**Collapsible**	Allow the web part to collapse the column if there is not enough space for it
▽	**Filterable**	Allow users to filter the column values by selecting one or more options in the column context menu
↑↓	**Sortable**	Allow sorting the view by column
⊂−⊃	**Link to Item**	Display column value as a link to item or document

💡 **Tip**

The List Filter web part allows users to customize columns, including the column caption, format, order of display, and appearance.

Folders

This section allows you to customize how the data in your folders is displayed.
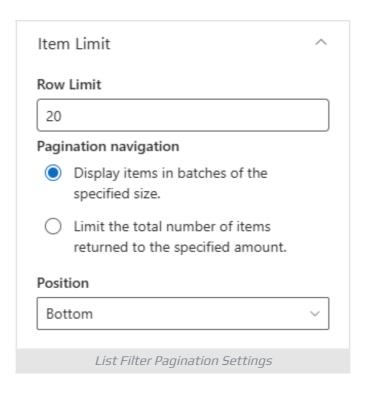
List Filter Folder Settings

You can choose between several options:

Show items inside folder (default). This option displays items inside each folder separately. **Show all items without folders**. This option shows all items at the same level, without any folders. This is known as a "flat view". **Display all items**. This displays all items and their folders at the same level.

Item Limit

This section allows you to customize the number of items that are displayed in the view. You can adjust the number using the slider provided.

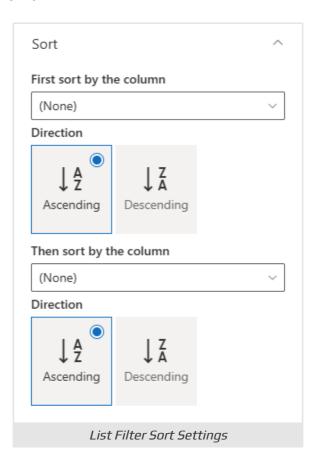*List Filter Pagination Settings*

Pagination

To enable pagination for the list view select **Display items in batches of the specified size** and choose the position of the pagination control (top, bottom, or

both). If you want to disable pagination select **Limit the total number of items returned to the specified amount** and specify the desired amount.
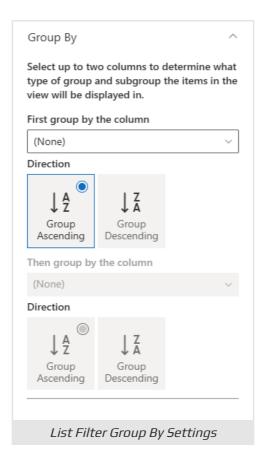
Sorting

You can sort the view by up to two columns.

List Filter Sort Settings

Group By

Grouping items in your view can help you navigate and understand the data more easily. To group items, select up to two columns in the corresponding section of the web part's settings:
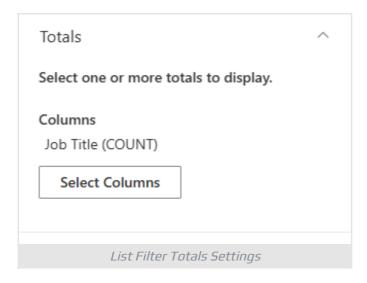
List Filter Group By Settings

> ⚠️ **Warning**
>
> The List Filter Online web part currently does not support collapsed grouping. However, we are working on implementing this feature and plan to include it in future updates.

Totals

Totals allow you to perform simple math calculations on specific columns within your list view.
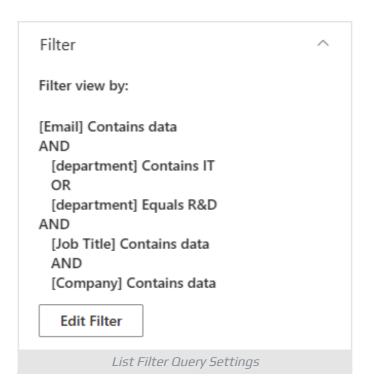
List Filter Totals Settings

To configure totals click **Select Columns** button under **Totals** heading in the configuration pane and choose the math function you'd like to perform (e.g., Count, Average, Maximum, Minimum, Sum, Standard Deviation, Variance).
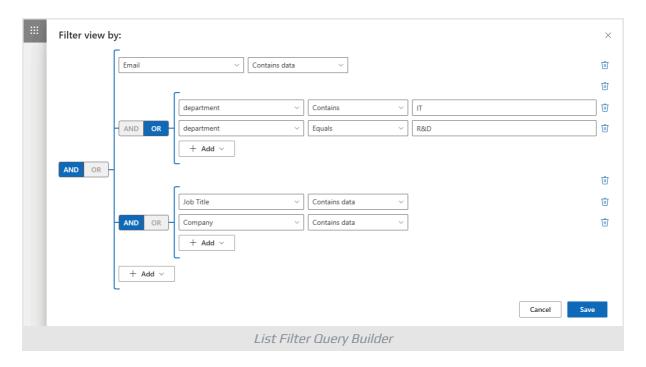

List Filter Totals Columns Settings

Filter

The List Filter web part provides a Query Builder tool that allows users to create complex queries for retrieving specific data from their SharePoint lists and libraries.

List Filter Query Settings

The Query Builder enables users to group conditions, use nested groups, and specify controls to create a filter query.
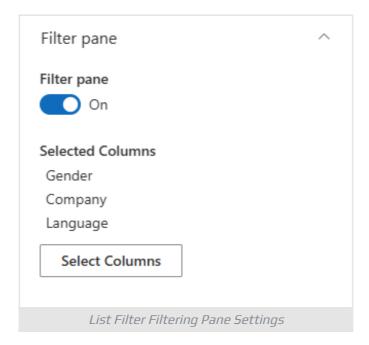

List Filter Query Builder

📝 **Note**

The List Filter Query Builder creates a CAML query to retrieve data from a SharePoint list or library.
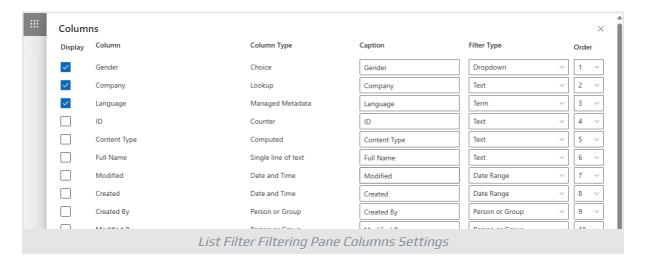
Filter Pane

The panel was created in order to provide end users with the ability to filter the list view using the columns and controls specified by an Administrator.
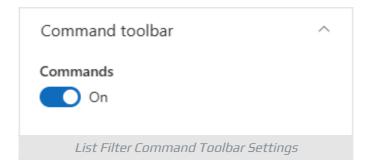

List Filter Filtering Pane Settings

To select columns and filter types click on the **Select Columns** button and choose the columns that will be available for filtering.

List Filter Filtering Pane Columns Settings

Command Toolbar

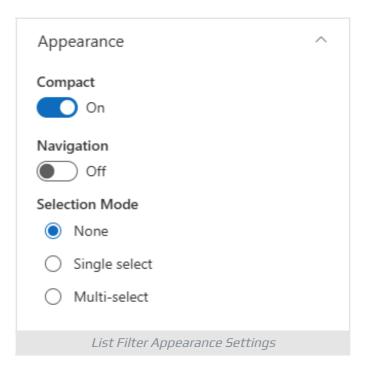You can show or hide the command toolbar from the list view.

List Filter Command Toolbar Settings

Appearance

The last section of the configuration panel allows you to customize the appearance of the web part. With this section, you can adjust the following settings:

- **Compact**. Display the list in a compact format to reduce the amount of space between rows.
- **Navigation**. Show or hide the breadcrumb navigation bar above the results.
- **Selection Mode**. Choose from three options: none, single selection, or multiple selections.

List Filter Appearance Settings

Summary

The Vitextra List Filter Online web part is an essential tool for enhancing data management in SharePoint Online. It allows users to efficiently filter and retrieve data from SharePoint lists or document libraries, improving both accuracy and productivity. With its customizable configuration options, this web part can be tailored to meet the specific needs of any organization, making it a valuable addition to your SharePoint toolkit.

Terms

CAML

Collaborative Application Markup Language (CAML) is a case-sensitive XML-based language used in SharePoint to define data definition objects such as lists, document libraries, views, content types, fields, and data rendering elements. For example, CAML can be used to build a query to filter and retrieve data from lists or libraries.

Document Library

A special type of list that stores files, folders, and information about them. Document Library, as well as List, can contain personal or shared views, item-level permissions, and so on.

List

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

REST API

REST API (Representational State Transfer Application Programming Interface) is a standardized way for software applications to communicate over the internet. It enables clients to request and manipulate data from a server using standard HTTP methods like GET, POST, PUT, and DELETE. REST APIs are widely used for building web services that are scalable, flexible, and can be accessed by various client applications.

Site

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

Site Collection

A SharePoint Site Collection is a grouping or container within the SharePoint platform that consists of one or more SharePoint sites, subsites, and related content. A SharePoint Site Collection typically shares common settings, permissions, and configurations, providing a cohesive environment for users to work together on projects, departments, or specific areas of focus. Site Collections are often used to segregate content and control access rights based

on organizational structure, security requirements, or project needs.

Web Part Gallery
The SharePoint Web Part Gallery is a centralized repository within SharePoint where users can discover, access, and manage various pre-built components, known as web parts, to enhance the functionality and customization of their SharePoint sites. It offers a diverse range of tools and widgets developed by Microsoft and third-party developers, empowering users to easily extend and tailor their SharePoint experience to meet specific business needs without extensive coding or development.