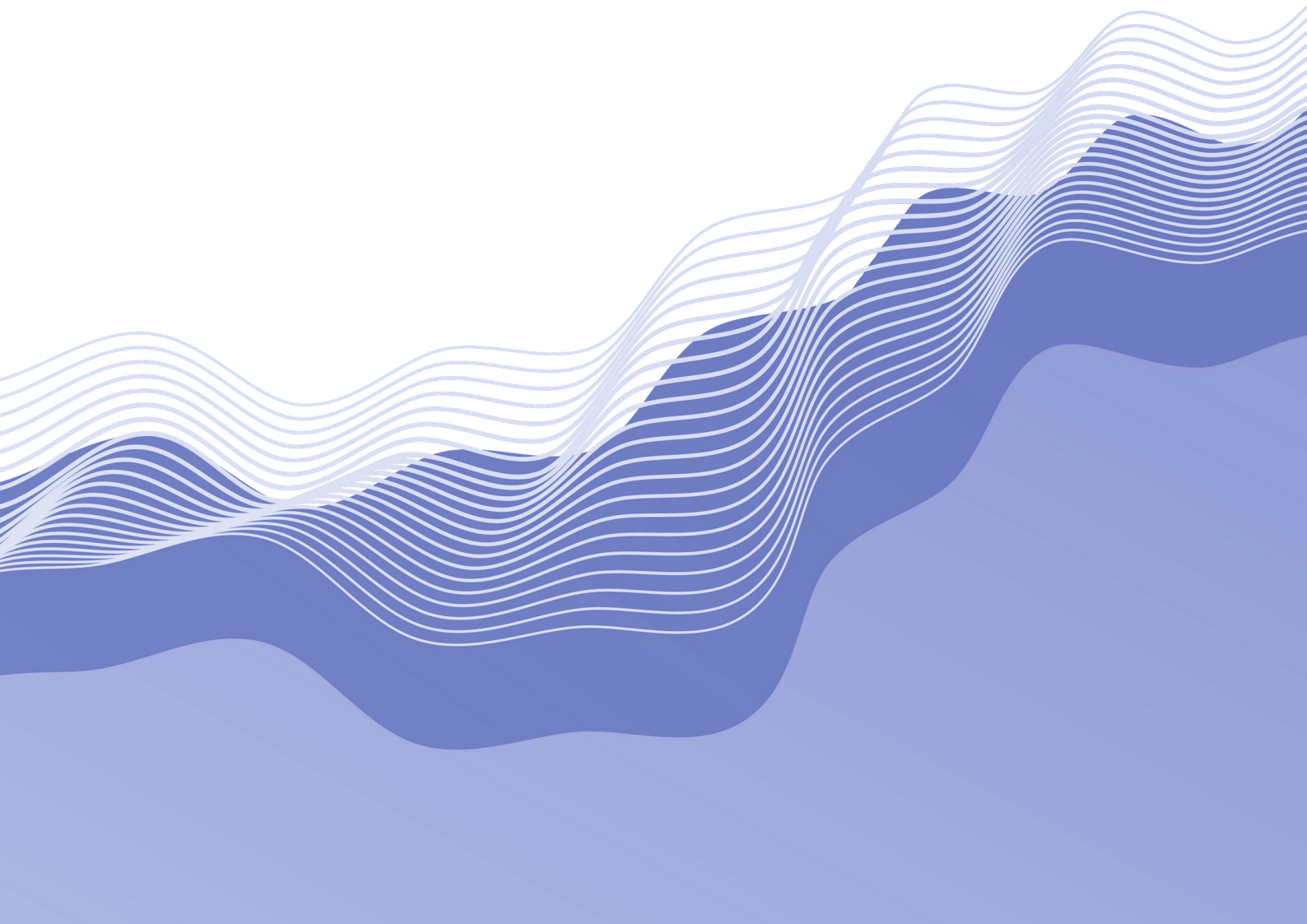




List Filter Online

Quick Start Guide

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About this Guide

This Quick Start Guide helps you install List Filter Online and publish a filterable view of a SharePoint list or library on a page in about 15 minutes. The guide is designed for Microsoft 365 administrators, site owners, consultants and IT professionals.

For a complete description of all settings, see the *List Filter Online. Administrator Guide*.

Product Overview

List Filter Online shows the items of a SharePoint list or document library on a modern page with a configurable filter pane. The administrator chooses the columns, the filter control for each column and an optional predefined query; users filter, sort, group and export the data. The data can come from any site of the tenant.

Key features of List Filter Online:

- Filter pane with drop-downs, date ranges, people and term pickers, numeric ranges and Yes/No toggles
- Query Builder for a predefined filter with nested AND/OR groups
- Saved filters and shareable filter links
- Sorting, grouping and totals
- Column formats and column formatting JSON from the list
- Folder navigation, item commands and version history
- Export to Excel
- Microsoft Teams tabs and the Open in List Filter command for native lists

Figure 1. List Filter Online on a SharePoint page

Installation

Software Requirements

SharePoint Online (Microsoft 365) with an app catalog. The web part works on modern pages and in Microsoft Teams.

Important

List Filter Online cannot be installed on SharePoint Server.

Supported browsers: the latest versions of Microsoft Edge, Google Chrome, Mozilla Firefox and Apple Safari, and the Microsoft Teams and SharePoint mobile apps.

Required Permissions

To install the package, you need the **SharePoint Administrator** role or Full Control on the App Catalog site. To add the web part to a page, you need edit permission on the page.

Note

List Filter Online uses the native SharePoint REST API and requests no API permissions. Nothing has to be approved in the SharePoint admin center.

Installation Package

Download the package from the Vitextra Download Center (<https://vitextra.com/en/downloads>) or Microsoft AppSource.

Tip

The Download Center provides updates and new features as soon as they are ready. Publication in AppSource can take up to two weeks because of the Microsoft verification process.

Extract the downloaded ZIP archive. It contains the file `vitextra.list-filter.spkg`.

Installation Procedure

1. Open the SharePoint admin center and go to **More features** → **Apps** → **Open**.
2. Click **Upload** and select `vitextra.list-filter.sppkg`.
3. Select **Enable this app and add it to all sites** and click **Enable app**.

The web part is now available on every site of the tenant. For step-by-step instructions, see [KB10251. How to Install List Filter Online and Add It to a Page](#).

Activation

A trial period with full functionality starts automatically after installation. To continue using the product after the trial, purchase a subscription and assign the license to your tenant.

Your tenant ID is shown in the **About** group of the web part properties. For details about subscriptions and license assignment, see [KB10037. Manage Your Subscription](#).

Setup and Configuration

Adding the Web Part to a Page

1. Open a modern page and click **Edit**.
2. Click + in a section and type *List Filter* in the toolbox search box.
3. Select the **List Filter** web part.

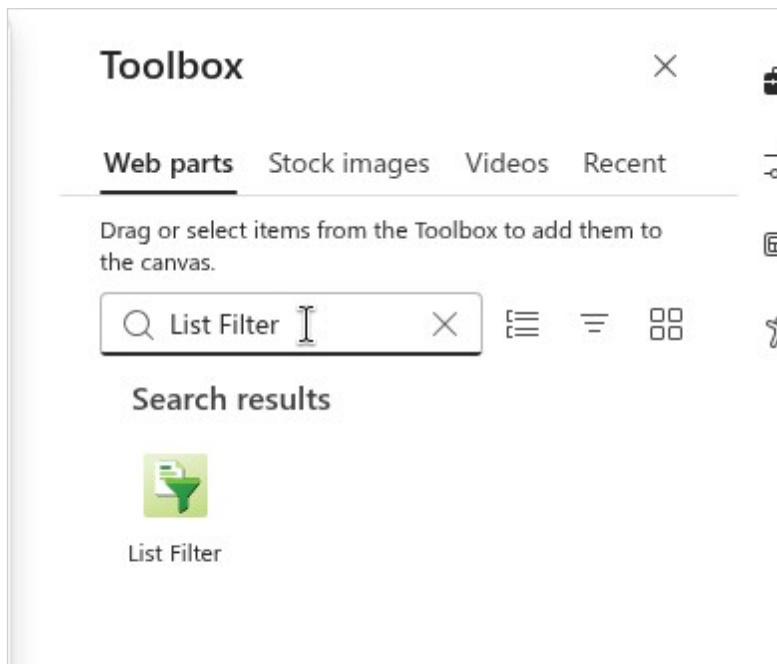


Figure 2. List Filter in the web part toolbox

The web part shows a checklist with three required parameters: **Site**, **List or Library** and **Columns**. Click **Configure Web Part** to open the property pane.

Minimal Configuration

All required parameters are in the **Data Source** group:

1. **Scope** — keep **Current Site**, or select **Other Site** and find the site in **Site URL**.
2. **List** — select the list or library.
3. **Columns** — click **Select Columns**, select **Display** for the columns to show, adjust **Caption** and **Order** if needed and click **Save**.

List Filter [X]

Data Source [^]

Scope

☐ Current Site

☒ Other Site

Site URL

Community Site [X]
https://vitextra.sharepoint.com/sites/comen

List

Project documents [v]

Columns

Select Columns

Figure 3. Data Source group

! Important

Changing the site or the list resets the columns, the filter pane columns and the predefined filter. Choose the data source first.

Setting Up the Filter Pane

1. Expand the **Filter pane** group and make sure that **Filter pane** is on.
2. Click **Select Columns**, select **Display** for the columns users will filter by and choose a **Filter Type** for each, for example **Dropdown** for a choice column, **Date Range** for a date and **Person or Group** for a person column.
3. Click **Save**.

Columns

Display

Column

☒

Title

☒

Department

☒

Project

☒

Status

☒

Assigned To

☒

Due date

☐

Amount

☐

Hours

☐

Billable

☐

ID

☐

Content Type

☐

Modified

☐

Created

☐

Created By

☐

Modified By

☐

Attachments

☐

Type

☐

RansomwareAnomalyMetalInfo

☐

Draft Owner Id

☐

Main Link settings

Column Type

Single line of text

Choice

Choice

Choice

Person or Group

Date and Time

Currency

Number

Yes/No

Counter

Computed

Date and Time

Date and Time

Person or Group

Person or Group

Attachments

Computed

Lookup

Lookup

Computed

Caption

Title

Department

Project

Status

Assigned To

Due date

Amount

Hours

Billable

ID

Content Type

Modified

Created

Created By

Modified By

Attachments

Type

RansomwareAnomalyMetal...

Draft Owner Id

Main Link settings

Filter Type

Text

Dropdown

Dropdown

Dropdown

Text

Text (with options)

Dropdown

Dropdown (Multiple Values)

Yes/No

Text

Text

Date Range

Date Range

Person or Group

Person or Group

Yes/No

Text

Text

Text

Order

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

Cancel

Save

Figure 4. Filter pane configurator

Recommended settings for a first page:

Table 1. Recommended settings

Group	Setting	Recommendation
Folders	Folders or Flat	Show all items without folders to search all items at once
Item Limit	Row Limit	20–50 items with pagination
Sort	First sort by the column	Modified, Descending
Filter pane	Cascading filters	On, if the pane has several drop-downs
Appearance	Selection Mode	Multi-select, to allow exporting selected items

 **Note**

On lists with more than 5,000 items, use indexed columns in the filter pane. The configurator marks non-indexed columns with a warning and can create the index.

Checking the Result

Click **Publish** or **Republish** and open the page as a user. Check that:

- the table shows the expected columns and items;

- the filter pane filters the items after **Apply Filter**, and the active filters appear as chips;
- users see only the items they have permission to read;
- **Export** creates an Excel workbook.

Adding the Web Part to Microsoft Teams

1. In the App Catalog, select **Vitextra List Filter** and click **Add to Teams**.
2. In a Teams channel, click +, select **Vitextra List Filter Online** and save the tab.
3. Open the tab menu, select **Settings** and configure the web part as on a page.

Next Steps

- Build a predefined filter with the Query Builder: [KB50025](#)
- Configure column captions and formats: [KB10258](#)
- Use column formatting from the list: [KB10259](#)
- Enable the Open in List Filter command: [KB10254](#)
- Read the *List Filter Online. Administrator Guide* for all settings, large lists and troubleshooting.
- Share the *List Filter Online. User Guide* with the users of the page.