KNOWLEDGE BASE ARTICLE

Organizing Questions: Categories, Grouping, Category Filter, Sorting and Collapsing

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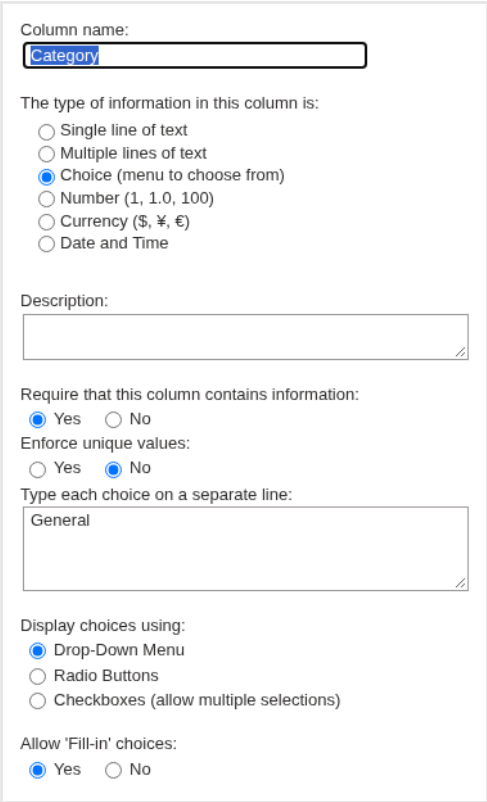
Overview

Ten questions can be a flat **list**; fifty need structure. Questions and Answers gives editors four tools for it: **categories** assigned to each question, **grouping** of the list by category, a **category filter** for readers, and **sorting** with a controllable order. A fifth setting, **Collapse by default**, decides whether readers see a compact index or the answers themselves. This article shows how to use each one and how to combine them. The settings live in the **Appearance** group of the property pane. The list created by this version keeps the field names Title, Answer, Category, Link, VideoUrl, Contact, Order and Published in English. Localized captions in the **web part** or in this article do not rename those fields. Title is not renamed to Question by the provisioning code.

Step 1. Define the categories

Categories are the values of the **Category** column of the questions list. The list created by the web part has a single choice, *General*, and allows typing new values (**fill-in choices**), so editors can add a category simply by typing it in the item form. For a tidy knowledge base, define the set deliberately:

1 Open the list (property pane → **Data Source** → **Open List**) and go to **List settings** → **Columns** → **Category**.
2 Enter one category per line in **Type each choice on a separate line** - for example *General*, *Accounts & passwords*, *Hardware*, *Software*, *Vacations & sick leave*.
3 Keep **Allow 'Fill-in' choices** on if editors should be able to add categories on the fly, or turn it off to enforce the list.



Defining the categories in the Category column

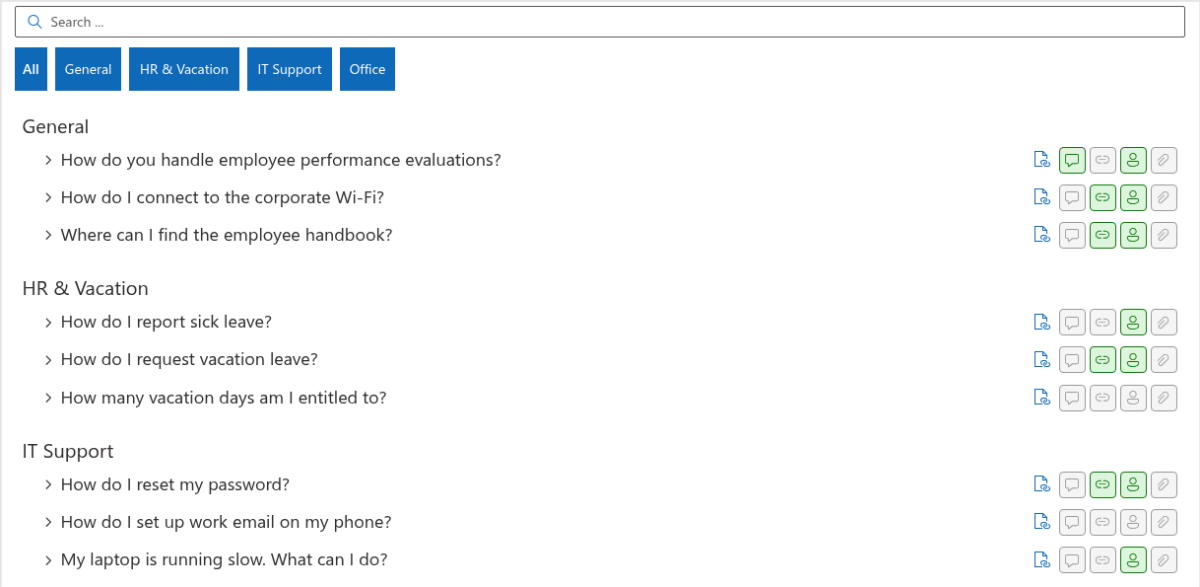
The web part shows categories alphabetically, both as group headers and as filter tabs. To force an order, prefix the names with a number (*1. Getting started*, *2. Accounts*) - the prefix is shown.

Note

Category is a required choice column. The created list contains the localized General choice and allows fill-in choices, but the field schema does not set a default. The question form sends only Title. Configure and test a Category default in the list before accepting questions; do not assume General is assigned automatically.

Step 2. Group the list by category

With **Group By** switched on and **Category** selected in the drop-down below it, the questions are shown under a header per category, in alphabetical order of the categories. Within each group the questions follow the **Sort by** setting. Grouping is disabled while a search query is active; search results are shown as a flat list. Categories use JavaScript string sorting, not a locale-aware collation.

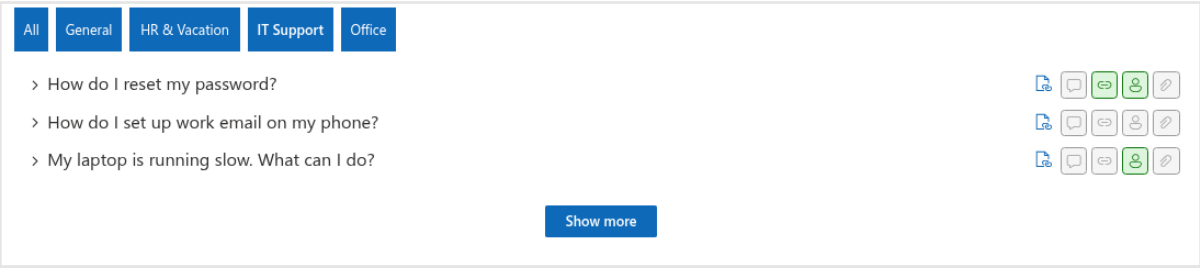


Questions grouped by category

Grouping suits knowledge bases of up to a few dozen questions where readers scroll: the headers act as a table of contents. With paged loading, the groups are built from the questions that are loaded; the next portion is merged into them.

Step 3. Turn on the category filter

Category Filter adds a row of tabs above the list: **All** and one tab per category found among the loaded questions. A reader clicks a tab to see one category only. The row appears only when at least two categories exist; with a single category there is nothing to filter.



The category filter tabs

The filter works together with grouping (a single group remains), sorting and search (matches of the selected category are shown; if none, the filter falls back to **All**). It suits knowledge bases where a reader usually wants one topic - a help center with IT, HR and Facilities sections on one page.

Grouping and the filter can be combined, but one of them is usually enough: headers for a page that is read top to bottom, tabs for a page that is consulted for one topic.

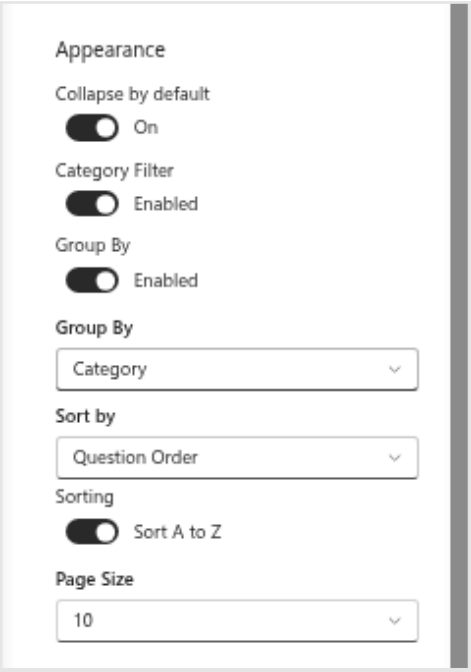
Step 4. Choose the order

Sort by offers three columns, and **Sorting** switches between *Sort A to Z* and *Sort Z to A*:

Sort by	Order	Use it for
Question Order	Order	Hand-arranged lists: the most important or most common questions first
Name	The question text alphabetically	Glossaries and reference lists that people scan by keyword
Created	The date the question was added; *Z to A* puts the newest first	Knowledge bases that grow continuously, with new answers highlighted at the top
(None)	The order in which **SharePoint** returns the items	Rarely useful; prefer one of the above

Sorting is applied when requesting list pages and again to loaded items. The order of equal values or items changed during paging is not guaranteed. New web parts sort by **Question Order**, ascending.

New lists disable grid editing; use item forms or enable grid editing in list settings first. Order values are returned without explicit numeric conversion and are also compared client-side, so verify the displayed order with your actual data rather than assuming numeric ordering or a fixed position for blanks.



The Appearance group

Step 5. Collapsed or expanded

Collapse by default (on for new web parts) shows only the question headers; readers expand what they need. Turn it off to show every answer open - appropriate for a short list of three to five policies that people should read in full, or for a single-question web part used as a notice.

A question opened through a deep link (`?questionId=N`) is always expanded, whatever the setting.

Recommended combinations

Knowledge base	Recommended settings
Up to 15 questions, one topic	No grouping, no filter; **Sort by** → **Question Order**; collapsed
15–60 questions, several topics, read by scrolling	**Group By** → **Category**; **Sort by** → **Question Order** within groups; collapsed; **Page Size** → **All** or 50
60+ questions, readers come for one topic	**Category Filter** on, grouping off; **Sort by** → **Name**; collapsed; **Page Size** → **20**; search box on
A living FAQ with frequent additions	**Sort by** → **Created**, *Z to A*; **Category Filter**

Knowledge base	Recommended settings
	on; search box on

Whatever the structure, keep the search box on: readers who do not know your categories still find answers by the words in them (see KB10378. Searching the Knowledge Base and Paged Loading in Questions and Answers).

Terms

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.

SharePoint
SharePoint is a web-based collaboration platform that provides content management, document management, workflow applications, search, and other tools that empower employees and teams to work together. SharePoint is also a secure place to store, organize, and access shared information.

Web Part
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.