

# Create a category

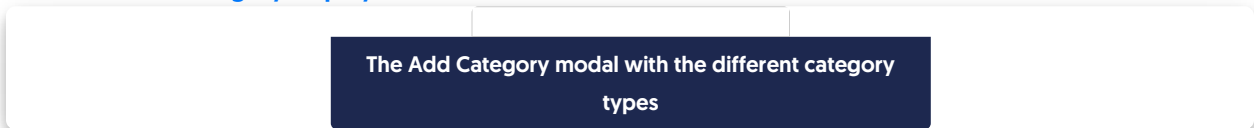
Last Modified on 12/05/2024 12:53 pm EST

Learn about category creation and category types.

## Add a category or subcategory

To add a category to your top level content:

1. In the left navigation, go to **Articles**.
2. If it's your first category, select **Add Your First Category**. If you have existing categories, select **+ Add Category** in the **Top Level Content** column.
3. The **Add Category** modal opens. Here you can choose between six **category types** that change the layout of the landing page. The default is a **Default** category, which will display articles in a list and subcategories in one of four **subcategory display** formats.



4. Once you choose a category type, select **Quick Add** to create the category and return to **Articles** to add more content, or select **Add and Edit** to go to the category editor and customize the category further.

To add a subcategory:

1. In the left navigation, go to **Articles**.
2. In the **Top Level Content** pane, select the top level category where you want to add the subcategory.
3. This will open the category in the right pane. In that pane, select **+ Add Subcategory**, and continue the category creation process.



### Content hierarchy

KnowledgeOwl does not limit the number of layers or levels of categories and subcategories in your knowledge base, so if you want more than three layers, go for it! Just be sure to test how it displays in your table of contents so you don't create a monster. Note that **blog style** and **topic display categories** do not allow subcategories.

## Choose a category type

When you create or edit a category, you can choose between several different types of categories. Category types can be changed at any point in time by editing the category.

The types of categories control :

- How the category landing page appears in the knowledge base.
- How the category looks and functions in the table of contents.
- Whether or not you can have subcategories within the category.
- Whether or not this category will pull and sync content from another knowledge base.
- Whether or not the category will redirect to another web page when viewed.

The six types of categories in KnowledgeOwl are:

- **Default**  
Displays articles in a simple list. Choose one of four **subcategory display** formats: title and description, subcategory panels, content list, or icon panels. Default is icon panels.
- **Blog style**  
Display a paginated list of articles with brief descriptions. Can only contain articles.
- **Topic display**  
Displays the full text of all articles in a single page. Can only contain articles.
- **Custom content**  
Create a landing page from scratch like an article. This type of category is available in search.
- **Shared content**  
Copy and sync a category and all its contents from another knowledge base.
- **URL Redirect**  
Clicking on this category to view it redirects the reader to another webpage of your choice.

## Default categories

The default category type is the most common choice for organizing and displaying content. You can create both subcategories and articles within a default category.

The landing page for a default category automatically displays the following:

- Full category title
- Category description
- Subcategories (using one of three display types)
- Articles in a simple list with the title and description

The subcategory display types are:

- **Title and description**  
Displays category titles and description in a simple grid format with three categories to a row. **Example: [Company and product info](#)** We have a modified version with subcategories in our knowledge base (we force one subcategory per row): **Example: [Security and permissions](#)**

Home

General Top-Level category Subscribe

This is a sample Title + Description category with articles displayed below subcategories

General Subcategory      Custom Content  
Category test 20190912

Articles

Article in default cat  
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

Linked article test (child)  
Meta description test.

Sample Default category with Title and description subcategory display type

- **Subcategory panels**

Displays subcategory titles in panels matching the homepage base category panels with three categories to a row. We have modified versions of this in our knowledge base (we force one category per row).

**Article Display limitation**  
When using subcategory panels, articles only show when using inline display for the Article Display options.

So, for example, here is the same category as above with subcategory panels selected, without the inline display selected:

Home

General Top-Level category Subscribe

This is a sample default category

General Subcategory      Custom Content  
Category test  
20190912

Sample Default category with Subcategory panels subcategory display type

And with the inline display selected, where articles are displayed in the same panels:

Home

Refine Search for articles... Contact Us Widget Help Logout

## General Top-Level category Subscribe

This is a sample default category

General Subcategory

Custom Content Category test 20190912

Article in default cat

Linked article test (child)

Sample Default category with Subcategory panels subcategory display type and article Inline display option

- **Content list**

Displays the title of each subcategory with a list of links to the first five subcategories or articles in the categories. The total number of subcategories and articles are displayed in parentheses with a link to view all. There is an option to show all child content rather than the first five. [Example: Account and billing.](#)

Home

Refine Search for articles... Contact Us Widget Help Logout

## General Top-Level category Subscribe

This is a sample default category

[General Subcategory \(1\)](#)

- [Test article in subcat](#)

### Articles

[Article in default cat](#)  
 Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

[Linked article test \(child\)](#)  
 Meta description test.

Sample Default category with Content list subcategory display type

- **Icon panels**

Like Subcategory panels, this display option will display each category in a panel, but it also displays the category's icon. If no icon has been added to the category, we'll display one of four default icons. With this layout, you can set how many categories you'd like to appear per row, limit how many categories to show, and whether to show the category description.

Articles cannot be displayed inline in this setup.

Here's a sample of the layout without category descriptions:


Home

Refine Search for articles... Contact Us Widget Help Log out


## General Top Level Category

Subscribe

This is a sample default category using icon panels



General Subcategory



Custom Content Category test  
20190912

### Articles

Article in default cat  
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

Linked article test (child)  
Meta description test.

**Sample Default category with Icon panels subcategory display type**

And with category descriptions:


Home

Refine Search for articles... Get help Widget Help Log out

## General Top Level Category


Subscribe

This is a sample default category using icon panels



General Subcategory

Here's my category description.



Custom Content Category test  
20190912

Learn more about how custom content categories work!

### Articles

Article in default cat  
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

Linked article test (child)  
Meta description test.

**Sample Default category with icon panels subcategory display type and category description shown**

After you set up your category, KnowledgeOwl automatically displays the category's content in the chosen format.

The default settings for a default category are:

- Icon panel subcategory display type
- Toggle option in the table of contents

If you choose to Quick Add a category, it will have the default settings.

## Table of contents appearance

Since default categories generally contain other content, they typically have an expand/collapse icon in the table of contents. See [Category appearance in the table of contents](#) for more details.

## Topic display categories

Topic display categories display the full text of all articles they contain on a single page, like one very long article. Readers can view all the topic display category's articles on a single page, reading it like a book or choosing which articles to read.

### Example: Authors

Topic display categories:

- Can only contain articles (not subcategories)
- Can be displayed accordion style, with each article collapsed below its title and clicking the title expands the content
- Can be displayed tabs style, with each article in a different tab at the top of the page
- Can have quick links, or a mini table of contents, at the top of the article that link to each article on the page
- Can have the first article set as an "intro" which will display above any of those controls
- Include their own Display Options to set all of that behavior 😊

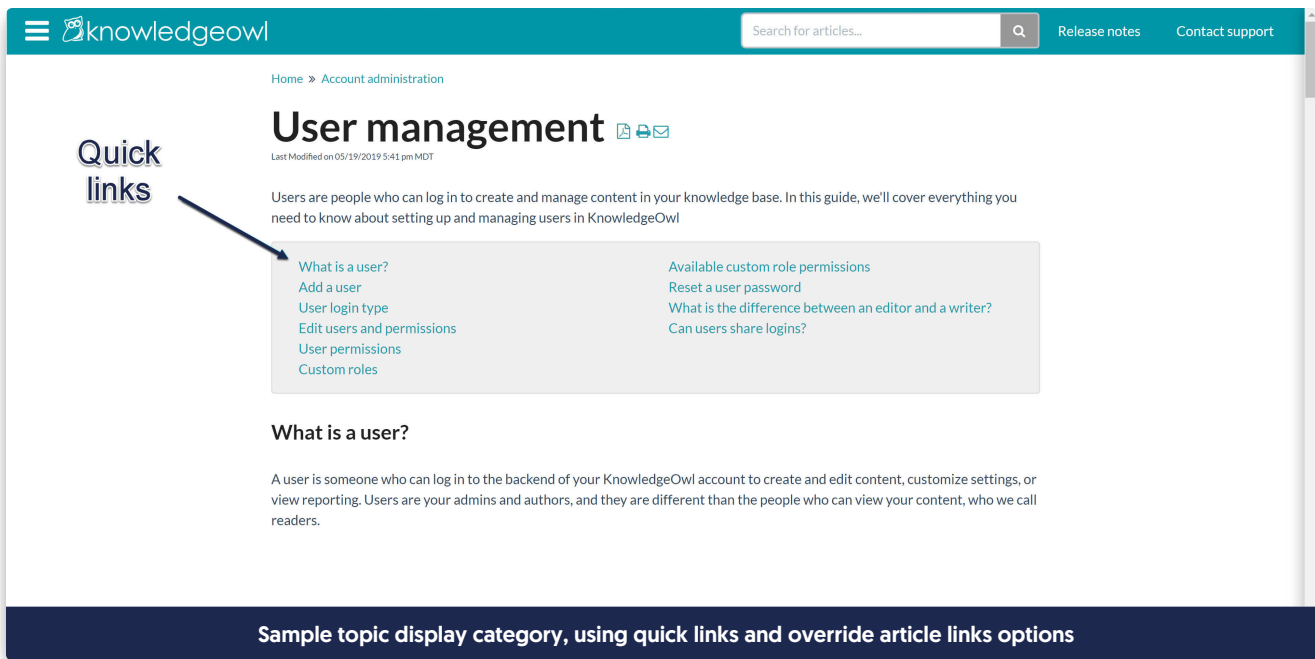
## Recommended use cases

Topic display categories are ideal for topics where you want a series of articles presented on a single screen, like chapters from a book or steps in a process. These are great for Frequently Asked Questions (FAQs) or long user guides.

For example, you might have an FAQ page with 20 frequently asked questions and answers. If you set this up using a topic display category, you would create the 20 FAQs as 20 separate articles.

When someone wants to read your FAQs, they can browse to the topic display category and view all the FAQs in one place. However, when someone searches for one of the FAQs, the individual FAQ article comes up in search, giving them the answer immediately rather than sending them to the FAQ page and requiring them to browse to their question.

Besides FAQs, longer documentation with multiple steps or sections are often good candidates for topic display categories. Some readers might want to view the full documentation in one place like a guide, whereas others might only need or want help with one section or step. Breaking up the documentation into separate articles in a topic display category allows people searching to get straight to the step or section they need, while people who want to view the documentation in full can use the topic-based category page.



## Layout options

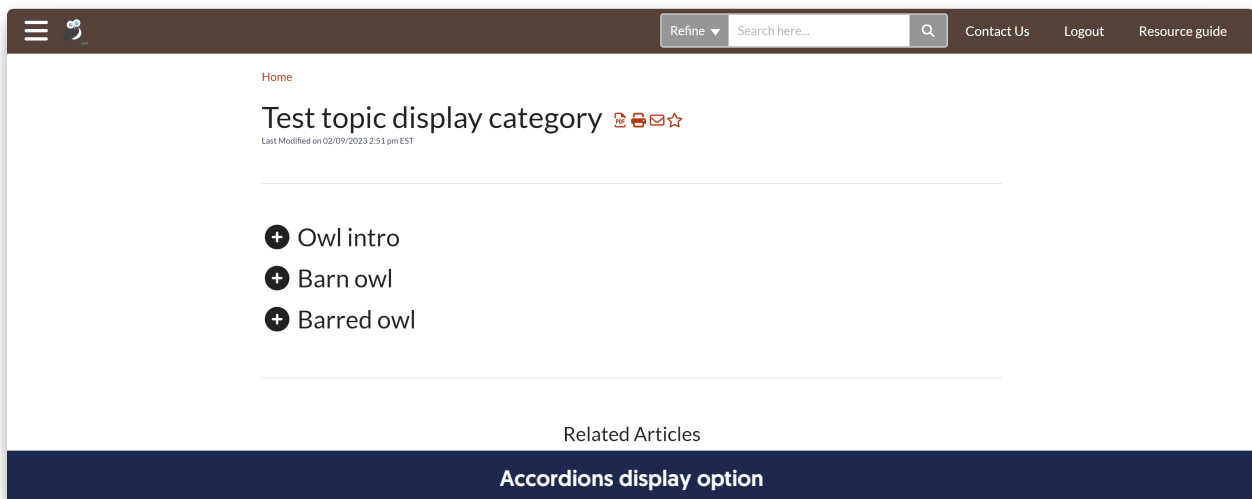
There are three available layout options:

### Layout Options

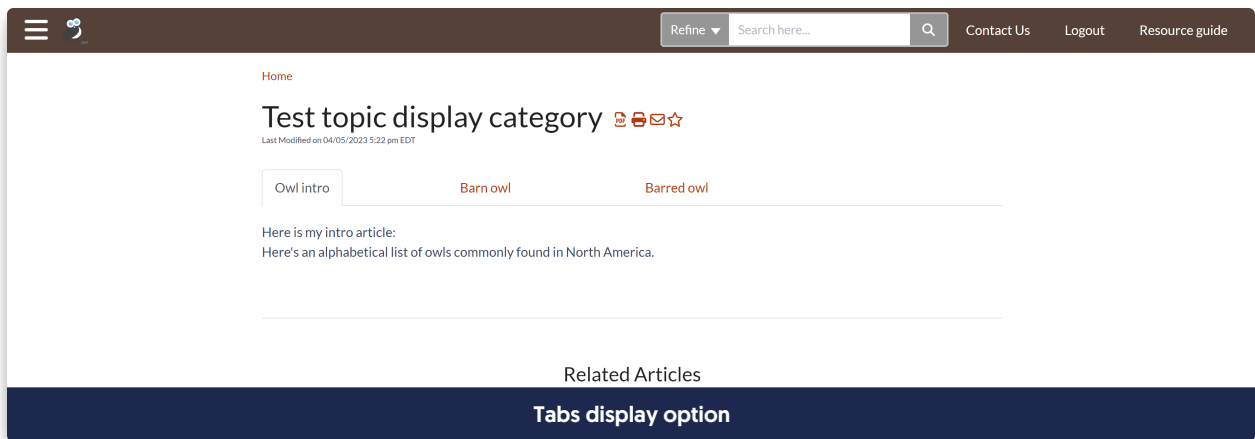
- Default — Display all articles using the default layout
- Accordions — Collapse all articles into expandable blocks
- Tabs — Display all articles as tabs

**1. Default:** This option will display the full text of all articles in the topic display category.

**2. Accordions:** This option places each article into an expandable block, with the article title displayed as the block heading. The blocks are collapsed and include a + / - icon displayed before them:



**3. Tabs:** This option creates a separate tab for each article, using the article's title as the tab label.



## Display options

There are five additional display options for topic display categories. You can select as many or as few of these as you'd like:

### Display Options

- Quick Links — Include a clickable table of contents at the top of the category
- Short Article Titles — Display the short article titles when available
- Override Article Links — Always navigate to the article section within this category page when the article link is clicked
- Intro article — Set the first article in this category to display at the top of the page with no title
- Hide description — Hide the category description on this category page

The Display Options available

**1. Quick Links:** creates a clickable Quick Links section, like a table of contents, at the top of the category.

Clicking a link jumps you to that section of the category:

- For the Default layout option, this will scroll you to the article.
- For the Accordions layout option, it will expand the accordion and scroll you.
- For the Tabs layout option, this will navigate to the appropriate tab.

**2. Short Article Titles:** When this box is checked, if the articles in this category have **short titles**, those will be used for:

- The article's title (for Default this adjusts the title as it displays; for accordions it adjusts the accordion text; for tabs it adjusts the tab label)
- The article's Quick Links link, if selected

**3. Override Article Links:** By default, articles in topic display categories can also be accessed as standalone articles from search.

- Checking this box means that any time a link for this article is clicked (permalink, search result, and so

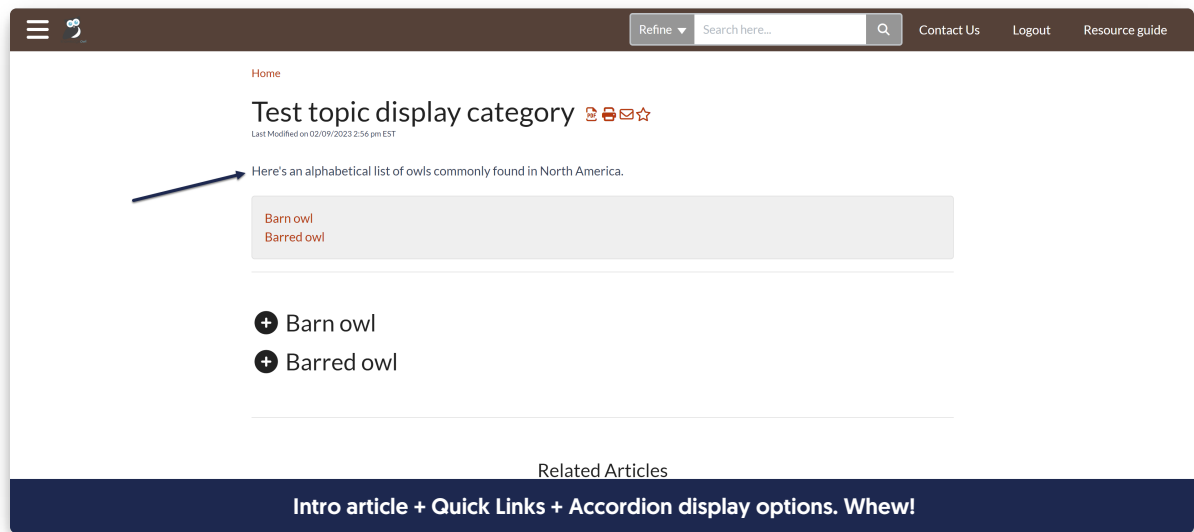


on), it will open the topic display category with this article open/visible instead. This can be useful if you want to force people to view the content in-context.

- Leave this box unchecked if you also want the article to appear as a standalone article.

#### 4. Intro Article: You can check this box to set the first article in your topic display category to be an "intro article".

- The intro article is displayed at the very top of the category with no article header, immediately under the category header. If you've used the Accordions or Tabs layout options or the Quick Links display option, the intro article will appear above those. With this option selected, reorder the articles to change which one is used as the intro. Here, we've used the option so that our intro article text displays above our other controls:



The screenshot shows a web interface for a topic display category. At the top, there's a navigation bar with a menu icon, a search bar, and links for 'Contact Us', 'Logout', and 'Resource guide'. Below the navigation bar, the page title is 'Test topic display category' with a 'Home' link and a 'Last Modified on 02/09/2023 2:56 pm EST' timestamp. An arrow points to the intro article text: 'Here's an alphabetical list of owls commonly found in North America.' Below this text is a list of articles: 'Barn owl' and 'Barred owl'. Underneath the list are two expandable items: '+ Barn owl' and '+ Barred owl'. At the bottom of the page, there's a 'Related Articles' section. A dark blue banner at the bottom of the screenshot reads 'Intro article + Quick Links + Accordion display options. Whew!'.



The intro article title will only be hidden in the topic display category and its PDF. It will be displayed in the [Standard PDF](#) and [Custom PDF](#) exports. And if the category is set up to display articles as standalone articles, too (you don't have the [Override Article Links](#) option checked), the title will display normally in the standalone article, too!

- #### 5. Hide description: By default, the topic display category page will display the category description between the category's title and the rest of the content. Check this box to hide that description. We find this especially useful when you're using the Intro article, since usually the Intro article is more detailed than the category description!

## Table of Contents options

As with other categories, you have the option to set whether a click in the table of contents will Toggle the category open/closed in the table of contents or Navigate to it. You can also choose to Hide contents of the category. See [Customize category behavior in the table of contents](#) for more details.

## Table of contents appearance

Since topic display categories generally contain other content, they typically have an expand/collapse icon in the table of contents. See [Category appearance in the table of contents](#) for more details.

## PDFs

Because topic display categories display all of their articles' content, they also get their own PDFs. When you update an article in a topic display category PDF, you'll need to resave the category itself to update its PDF. You'll see a warning message across all articles in the category once this occurs:



Sample warning of outdated topic display category  
PDF

As well as in the category itself:


Once you resave the category, the category's PDF automatically updates.

## Blog style categories

The blog style category displays articles in a similar way to a blog - reverse chronological order and paginated.

[Example: Release Notes](#)

The blog style category:

- Can only contain articles
- Does not display its articles in the table of contents
- Can display 5, 10, 15, or 20 articles per page (the default is 10)
- Can display articles in reverse chronological order OR in the same set order as the application (the default is reverse chronological)
- In the article display, if a meta description exists for the article, that is used for the description. Otherwise, the first ~250 characters of the article body text are used.
- Has a special [icon in the table of contents](#), which looks like: 

If your category uses reverse chronological order, it will sort your articles by:

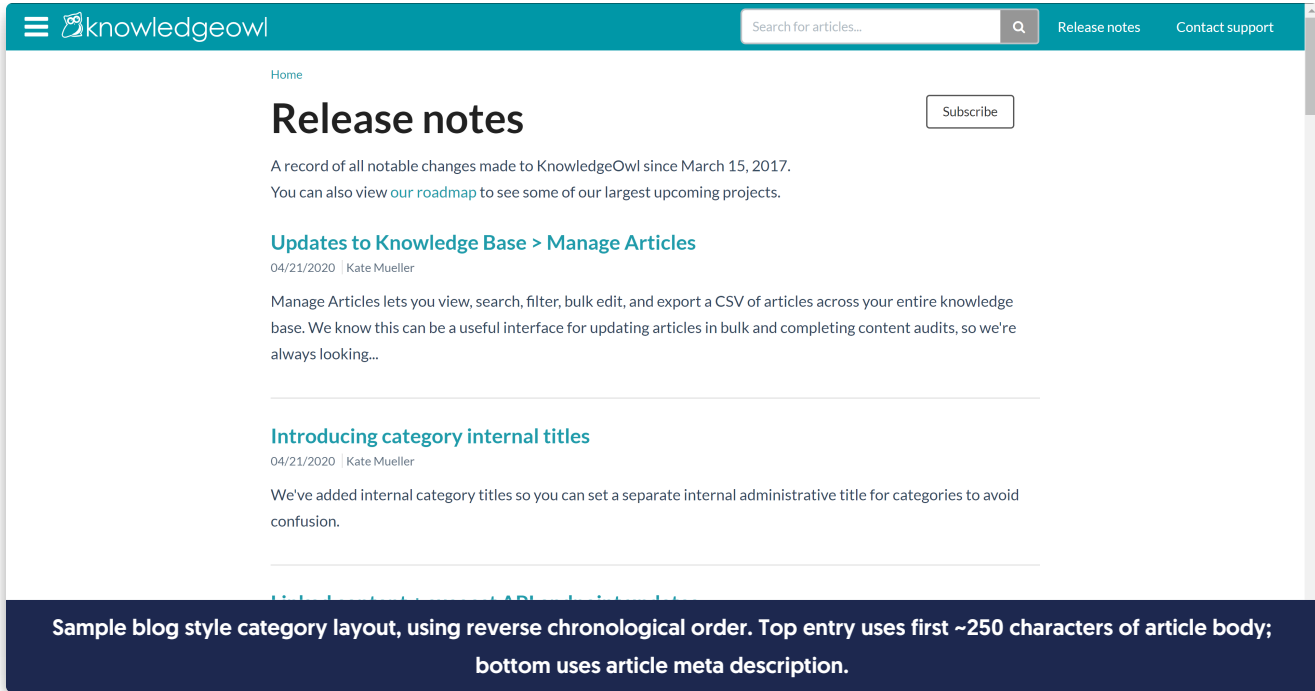
- Date published, if it exists, with most recently published at the top
- Date created, if no date published exists

## Recommended use cases

Aside from blog posts, this category type is particularly useful for announcements, such as:

- Changes
- Release notes
- Newsletters

It gives readers the chance to browse through topics while keeping the most recent articles at the top. We use this format for our own Release Notes.



## Table of contents appearance

As noted above, blog style categories have a different icon displayed in the table of contents. See [Category appearance in the table of contents](#) for more details.

## Shared content categories

The shared content category allows you to pull in and sync the content from a category in a separate knowledge base. You must have access to both knowledge bases to set up this kind of category.

This category type is useful when you are maintaining separate knowledge bases and have content that needs to be shared between them.

For more information on how syncing works, refer to [Sync behavior in shared content categories](#).

## Table of contents appearance

Shared content categories take on the table of contents display based on the category's overall type (default, topic display, blog, URL redirect, etc.) See [Category appearance in the table of contents](#) for the different icons.

## Custom content categories

Custom content categories allow you to create your category landing page from scratch, much like an article. Like an article, custom content categories are included in search results. A custom content category is both an article and a category.

If the category has content, there are two display options, controlled using [merge codes](#):

1. `[template("content-list")]`

The template content-list merge code will display subcategories in content list format.

## 2. [template("panel-list")]

The template panel-list merge code will display subcategories in subcategory panel format.

Both merge codes display a simple list of articles with titles and description below the subcategories.

## Table of contents appearance

Custom content categories will show up in one of two ways in the table of contents:

- If they contain additional content (like subcategories and articles), they'll get have an expand/collapse icon like default and topic display categories.
- If they don't contain any additional content, they'll use the solid icon that URL redirect categories use.

See [Category appearance in the table of contents](#) for more details.

## Recommended use case

Custom content categories are great when you want total control over your category's look and feel, or when you have a page of content you'd like readers to be able to [subscribe to receive notifications](#) on updates.

## URL redirect categories

You can use URL redirect categories to include a category-styled link to other URLs, both within and outside of KnowledgeOwl.

When you use a URL redirect category, KnowledgeOwl does not show the content in the category; instead, it loads the URL specified in the URL redirect.

Add Category
✕

ⓘ A category is a folder or container for articles.

**Category Title:**

**What style of landing page do you want?**

Default

Displays articles in a simple list. Choose one of three sub-category display formats.

Topic-based

Displays the full text of all articles in a single page. Can only contain articles.

Blog style

Display a paginated list of articles with brief descriptions. Can only contain articles.

Custom content

Create landing page from scratch like an article.

Shared content

Copy and sync a category and all its contents from another knowledge base.

URL Redirect

Navigate end user to another web page when clicked.

**External URL**

[Cancel](#)
Quick Add
Add and Edit

Once you save the category, you have the option to open the link in the same tab or a new tab.

[Old Links](#)
[Copy Link](#)
[View Category](#)

Permalink:

**Full Category Title** [Add Short Title](#) [Add Internal Title](#)

**Category Description**

**Redirect URL**

**Redirect Link Behavior**

Open link in new tab

Open link in same tab

**Title Tag**

Defaults to "Category Title | KB Name", the title tag is an accurate and concise description of the article that is important for SEO and social sharing. Recommended length is between 50-70 characters as longer titles may be truncated.

**Meta Description**

## Table of contents appearance

Since URL redirect categories generally don't contain content, they don't generally show an expand/collapse icon in the table of contents. See [Category appearance in the table of contents](#) for more details.

## Recommended use cases

URL redirect categories are a great solution when you want to provide a link to your company intranet, company website, or partner websites, and you want that link to appear in the table of contents, homepage, or category landing pages, just like another category.

Example: go to [Company and product information](#) and click the [Company website link](#).

## Category appearance in the table of contents

KnowledgeOwl displays links to categories in the table of contents. The category type and contents can affect its appearance:

All category types include a right-pointing chevron or arrow until they are expanded, then it switches to a down-pointing chevron or arrow.

Blog-style categories have a different icon, which looks like a talking speech bubble.

Non-category links generally show up differently:

- If the option to [add a homepage link](#) to to the table of contents is checked in **Settings > Basic**, Home is displayed with a house icon.
- If the option to [add a link to the Glossary](#) is checked in **Settings > Basic**, Glossary is displayed with a book icon.
- If the option to [add a link to the full PDF download](#) is checked in **Settings > Basic**, the Full PDF download is displayed with a PDF icon.

Here's a sample of what you might see with differing categories:



In this knowledge base, we use plus (+) and (-) icons and show a different icon if the category contains no content. If you'd like that same look and feel, see [Change the icons used in the table of contents](#) for how we did it.