

ArtfulBits Cascaded Lookup Column

for Microsoft® SharePoint®



User Guide

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Overview

Cascaded Lookup Column is intended to enhance standard SharePoint lookup functionality. Component allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.

Cascaded Lookup Demo > Customers > New Item

Customers: New Item

OK Cancel

Attach File | Spelling... * indicates a required field

Company Name *	<input type="text"/>
Country	USA
State	California
City	Los Angeles
ZIP	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>

City dropdown menu items: (None), Anaheim, Fresno, Long Beach, Los Angeles, Oakland, Ontario, Sacramento, San Diego, San Francisco, San Jose, Santa Ana

OK Cancel

For multiple data entry, just select the “Allow multiple values” option, the front-end UI will allow multiple selections to be added/removed from a list. If you're using a series of parent-child Cascaded Lookups, each subsequent field will immediately update as you add or remove each selection from the prior one.

States	<ul style="list-style-type: none"> Alabama Alaska Arizona Arkansas Colorado Connecticut Delaware District of Columbia 	Add > < Remove	<ul style="list-style-type: none"> California Missouri Texas
Cities	<ul style="list-style-type: none"> Anaheim Austin Columbia Dallas El Paso Fresno Independence Lee's Summit 	Add > < Remove	<ul style="list-style-type: none"> Houston, Kansas City Los Angeles

Cascaded Lookup column supports converting from standard “Lookup” column and vice versa (it allows editing content of Cascaded Lookup column in Datasheet view).

Feature List

Feature	SharePoint 2007	SharePoint 2010
Build parent-child relationships	✓	✓
Ajax support enabled	✓	✓
Unlimited number of cascading levels	✓	✓
Supported single-single, single-multi, multi-single and multi-multi relations	✓	✓
Supported lookup data from SharePoint lists in all sites within site collection	✓	✓
Supported lookup data from subfolders	✓	✓
Filtering retrieved data using existing list views	✓	✓
Ability to add and edit lookup items on the fly	✓	✓
Supported Datasheet view	✓	✓
Conversion among "ArtfulBits Cascaded Lookup", "ArtfulBits Cross-Site Lookup", "ArtfulBits Parent Selector" columns and standard SharePoint "Lookup" column	✓	✓
Language pack support (desired localization could be added by request)	✓	✓

Why ArtfulBits Cascaded Lookup Column?

SharePoint Cascaded Lookup is powerful lookup tool that saves your time by reducing presented options and avoids the possibility of incompatible value selection.

ArtfulBits Lookups and standard SharePoint Lookup columns feature comparison

Feature	SharePoint Lookup	Parent Selector	Cross-Site Lookup	Cascaded Lookup
Lookup data from lists cross-site within site collection			✓	✓
Lookup data from lists on the same site	✓		✓	✓
Lookup data from the same list	✓	✓	✓	✓
Single and multiple lookup	✓	✓	✓	✓
Parent-child relationships				✓
Support lookup data from subfolders		✓	✓	✓
Picker Dialog for searching items in lookup lists		✓	✓	
Filtering retrieved data using existing list views		✓	✓	✓
Adding lookup items via New Item form on the fly			✓	✓
Adding lookup items via inline entering on the fly			✓	
Editing lookup items via Edit Item form on the fly			✓	✓
Excluding own item from lookup list during item editing		✓		
Checking whether hierarchical data is non-cyclic		✓		
Conversion among "ArtfulBits Cascaded Lookup", "ArtfulBits Cross-Site Lookup", "ArtfulBits Parent Selector" columns and standard SharePoint "Lookup" column		✓	✓	✓

How to Use

To use Cascaded Lookup column you should select appropriate option in the list of available columns on the Create Column page. Change default settings on Cascaded Lookup Special Settings section in order to adjust column to your needs.

The screenshot shows the 'Cascaded Lookup Special Settings' configuration panel. It includes the following fields and options:

- Get information from the following site:** Cascaded Lookup Demo
- Get information from the following source list:** Cities
- Display the following column:** City
- Parent column for cascaded lookup:** State
- Filter by following column in source list:** State
- Allow multiple values
- Use filter by list view
- Allow adding of items to the source list (referenced list information is getting from):**
 - None
 - Item is added using separate list New Form (display 'Add new item' link)
- Link caption:** Add City

Cascaded Lookup settings:

- Source site and list to get information from
- Display column (from source list) and values to be displayed
- Parent Column (not required) for cascaded lookup (in current list) that triggers a change for this Cascaded Lookup column. If column is not provided, default Cross-Site Lookup column behavior will be applied (no cascading). Lookup, Person or Group, Choice, Single line of text, Yes/No column is available as parent column
- Filter Column (located in source list) that provides filtering mechanism for this Cascaded Lookup Column. Lookup, Person or Group, Choice, Single line of text, Yes/No column is available as filter column
- “Allow multiple values” property allows multiple selections for Cascaded Lookup column
- “Use filtering by list view” option applies additional filter for proposed items in cascaded lookup (only items from the selected view could be presented in Cascaded Lookup field)

Example: there are two SharePoint lists: USA States (contains State column) and Cities (City, State column). You have third list (Customers) and need to add State and City column with parent-child relationships. In this case you should add State column (it can be standard SharePoint Lookup, ArtfulBits Cross-Site Lookup or ArtfulBits Cascaded Lookup). Add City column (ArtfulBits Cascaded Lookup) with parent-child relationships after that. Do following:

- In “Get information from the following site” drop-down list, select site that contains Cities list

- In “Get information from the following list”, select Cities list
- In “Display the following column”, select City column in Cities list
- In “Parent column for cascaded lookup”, select State column of current list
- In “Filter by following column in source list”, select State column from USA States list

After that State column value changing triggers a change of City column in customer’s list.

Enabling “Item is added using separate list New Form” property allows adding items to source list on the fly:

Country	Canada ▼
State	Ontario ▼
City	(None) ▼ <input type="checkbox"/> Add City

Document Library can be selected as lookup source list. In that case ArtfulBits Cascaded Lookup allows to lookup to subfolders. Checking “Use filter by subfolder” allows selecting exact folder from which data will be got. “Show the following items” section specifies which items (and/or folder) will be shown in selection drop-down.

Get information from the following site:
 Cascaded Lookup Demo ▼

Get information from the following source list:
 Documents ▼

Display the following column:
 Title ▼

Parent column for cascaded lookup:
 (None) ▼

Filter by following column in source list:
 (None) ▼

Allow multiple values

Use filter by list view

Use filter by subfolder
 Public Documents > Regulatory Acts ▼

Show the following items

Items and Folders
 Items and Folders (recursively)
 Items Only
 Items Only (recursively)
 Folders Only
 Folders Only (recursively)

Release Notes

Version	Notes
v1.37 (March 24, 2011)	Improvements: <ul style="list-style-type: none">Removed duplicated values
v1.36 (March 19, 2011)	Bugs Fixed: <ul style="list-style-type: none">Fixed field available values refreshing in multilevel parent-child relationships
v1.35 (March 12, 2011)	Bugs Fixed: <ul style="list-style-type: none">Fixed cascading lookup behavior when parent column has lookup type and is requiredFixed filtering by non lookup type column
v1.34 (January 5, 2011)	Bugs Fixed: <ul style="list-style-type: none">Cascaded Lookup update was not working properly in IE browser with parent lookup column with more than 20 items
v1.33 (December 23, 2010)	Bugs Fixed: <ul style="list-style-type: none">Fixed New/Edit item customized form
v1.32 (December 11, 2010)	Improvements: <ul style="list-style-type: none">Added Content Type support
v1.31 (November 26, 2010)	Bugs Fixed: <ul style="list-style-type: none">Fixed feature activation problem
v1.3 (November 16, 2010)	New Features: <ul style="list-style-type: none">Added Russian and German localization Bugs Fixed: <ul style="list-style-type: none">Fixed minor issues
v1.2 (September 2, 2010)	New Features: <ul style="list-style-type: none">Ability to edit lookup items via Edit Item form on the fly Bugs Fixed: <ul style="list-style-type: none">Fixed minor issues
v1.1 (August 3, 2010)	New Features: <ul style="list-style-type: none">Added Datasheet view support Bugs Fixed: <ul style="list-style-type: none">Fixed cascading behavior when Parent and Filter columns have different type

v1.0
(July 1, 2010)

Initial Release

See Also



[KPI Column](#)

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.



[Category Column](#)

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.



[Progress Column](#)

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page using percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



[Follow-Up Column](#)

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.



[Image Upload Column](#)

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.



[Discussion Column](#)

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.



[Cross-Site Lookup Column](#)

Use Cross-Site Lookup Column for getting data from any site within site collection. Component includes a powerful function of searching over lookup list. This function provides substring matching in selected column which is very useful for large lists (over 50-100 items).



[Parent Selector Column](#)

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.

Remarks

Some information in this document may be outdated. Please, visit www.artfulbits.com for the latest version.