

# ArtfulBits Cascaded Lookup Column

*for Microsoft® SharePoint®*



## User Guide

Overview .....	1
Feature List.....	3
Why ArtfulBits Cascaded Lookup Column?.....	3
ArtfulBits Lookups and standard SharePoint Lookup columns feature comparison .....	3
How to Use.....	4
Release Notes.....	6
See Also .....	8
Remarks .....	9

### 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"/>

OK Cancel

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

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.

<b>States</b>	Alabama Alaska Arizona Arkansas Colorado Connecticut Delaware District of Columbia	Add > < Remove	California Missouri Texas
<b>Cities</b>	Anaheim Austin Columbia Dallas El Paso Fresno Independence Lee's Summit	Add > < Remove	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	SharePoint 2013
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	✓	✓	✓
Supported default values	✓	✓	✓
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		✓	✓	✓
Supported default values		✓	✓	✓
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.

**Cascaded Lookup Special Settings**  
Specify special Cascaded Lookup 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="button" value="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)
<input type="checkbox"/> Allow multiple values	
<input type="checkbox"/> Use filter by list view	
<input checked="" type="checkbox"/> Use filter by subfolder	Public Documents > Regulatory Acts
Show the following items	
<input type="radio"/> Items and Folders	
<input type="radio"/> Items and Folders (recursively)	
<input type="radio"/> Items Only	
<input checked="" type="radio"/> Items Only (recursively)	
<input type="radio"/> Folders Only	
<input type="radio"/> Folders Only (recursively)	

## Release Notes

Version	Notes
v2.0 (April 29, 2013)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added SharePoint 2013 support</li> <li>Added Russian and German localization</li> </ul>
v1.48 (April 26, 2012)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Improved adding and editing of the source list items on-the-fly</li> </ul>
v1.47 (March 27, 2012)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Improved performance</li> </ul>
v1.46 (February 2, 2012)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed cross-site lookup data display in list view web part</li> </ul>
v1.45 (January 26, 2012)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Added filtering support by Content Type column</li> </ul>
v1.44 (October 14, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed column required option</li> </ul>
v1.43 (September 07, 2011)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Added support of Managed Metadata column as Parent column</li> </ul>
v1.42 (August 29, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed cascading lookup behavior in page layouts</li> </ul>
v1.41 (August 08, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed column value if (None) is selected</li> </ul>
v1.4 (June 01, 2011)	<b>New Features:</b> <p>Added default values support</p> <b>Improvements:</b> <ul style="list-style-type: none"> <li>Added support for new licensing model (ArtfulBits License Manager v1.4)</li> <li>Added "Save site as template" support</li> <li>Improved behavior with multilevel parent-child relationships, when Cascaded Lookup columns reference data from the same list</li> </ul>
v1.37 (March 24, 2011)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Removed duplicated values</li> </ul>
v1.36 (March 19, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed field available values refreshing in multilevel parent-child relationships</li> </ul>

v1.35 (March 12, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed cascading lookup behavior when parent column has lookup type and is required</li> <li>Fixed filtering by non lookup type column</li> </ul>
v1.34 (January 05, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Cascaded Lookup update was not working properly in IE browser with parent lookup column with more than 20 items</li> </ul>
v1.33 (December 23, 2010)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed New/Edit item customized form</li> </ul>
v1.32 (December 11, 2010)	<b>Improvements:</b> <ul style="list-style-type: none"> <li>Added Content Type support</li> </ul>
v1.31 (November 26, 2010)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed feature activation problem</li> </ul>
v1.3 (November 16, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added Russian and German localization</li> </ul> <b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed minor issues</li> </ul>
v1.2 (September 02, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Ability to edit lookup items via Edit Item form on the fly</li> </ul> <b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed minor issues</li> </ul>
v1.1 (August 03, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added Datasheet view support</li> </ul> <b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Fixed cascading behavior when Parent and Filter columns have different type</li> </ul>
v1.0 (July 01, 2010)	<b>Initial Release</b>

## See Also



### [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.



### [Column Data Adapter](#)

Column Data Adapter is an extension component providing ability to use ArtfulBits Columns in Microsoft Access forms, reports and Microsoft Excel.



### [Column Permissions](#)

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.



### [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).



### [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.



### [Email Web Part](#)

ArtfulBits Email Web Part allows sending e-mail messages directly from Microsoft SharePoint site. You can notify task assigned users, send gratitude or just send regular e-mail message, etc.



### [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.



### [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.





#### **[Link to Document Column](#)**

Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.



#### **[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.



#### **[Password Change Web Part](#)**

Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).



#### **[Password Expiration Web Part](#)**

Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.



#### **[Professional Calendar Web Part](#)**

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in one Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.



#### **[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.



#### **[Video](#)**

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

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## **Remarks**

Information in this document may be outdated. Please, visit [www.artfulbits.com](http://www.artfulbits.com) for the latest product version.