

# ArtfulBits Cross-Site Lookup Column

*(with Search Function)*  
for Microsoft® SharePoint®



## User Guide

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## Overview

Cross-Site Lookup Column is intended to enhance standard SharePoint lookup functionality. Component allows getting information from any site within site collection, applying list view filtering to retrieved data.

Get information from this site:  

ArtfulBits SiteColumns - 2 ▼

Get information from:  

Customers ▼

In this column:  

Address ▼

☐ Allow multiple values  
☐ Use Picker Dialog  
☐ Use filter by list view

Allow adding of items to the linked list (referenced list information is getting from):  

☒ None  
☐ Item is added using separate list New Form (display 'Add new item' link)  
☐ Item is added on fly directly on current page (display TextBox and 'Add New Item' button)

Component delivers a powerful function of searching over lookup list. This function provides substring matching in selected column. It is very useful for large lists with over 100 items.

## Orders: Antonio Moreno Taqueria

OK Cancel

Attach File | Delete Item | Spelling... \* indicates a required field

Order Name *	Antonio Moreno Taqueria
Order Date	10/16/2009
Customer	Mataderos 2312

Created at 10/16/2009 4:56 PM by Nazar  
Last modified at 10/16/2009 4:56 PM by N

Picker -- Webpage Dialog

Find Contact Name

Contact Name	Company Name
Maria Anders	Alfreds Futterkiste
Ana Trujillo	Ana Trujillo Emparedados y helados
Antonio Moreno	Antonio Moreno Taquería
Martín Sommer	Bólido Comidas preparadas
Patricio Simpson	Cactus Comidas para llevar

Found 5 matches.

OK Cancel

Supported converting of standard "Lookup" column to "ArtfulBits Cross-Site Lookup" column and vice versa (it allows editing content of Cross-Site Lookup columns in Datasheet view).

Also, useful feature for adding items on fly. There are two ways how to do that: via new item form or inline entering:

The screenshot shows a SharePoint form for 'Cross-Site Lookup'. At the top, there is an 'Attach File' button and a note that '\*' indicates a required field. The form has two main sections. The first section, 'Cross-Site Lookup (new item adding)', contains a text input field for 'Title \*' and a larger text input field for the lookup value. Below the lookup field is a button labeled 'Add new item' which is circled in red. The second section, 'Cross-Site Lookup (new item adding on fly)', also has a text input field for the lookup value. Below this field is another text input field, also circled in red, followed by a button labeled 'Add New Item'. At the bottom right of the form are 'OK' and 'Cancel' buttons.

## Feature List

Feature	SharePoint 2007	SharePoint 2010
Supported lookup data from SharePoint lists in all sites within site collection	✓	✓
Supported lookup data from subfolders	✓	✓
Powerful function of searching over lookup list. Using a Picker Dialog for searching items in lookup lists.	✓	✓
Filtering retrieved data using existing list views	✓	✓
Single and multiple lookup for standard mode and using Picker Dialog	✓	✓
Supported default values	✓	✓
Supported Datasheet view	✓	✓
Conversion among "ArtfulBits Cross-Site Lookup" column and standard SharePoint "Lookup" column	✓	✓
Ability to add and edit lookup items on the fly	✓	✓
Language pack support (desired localization could be added by request)	✓	✓

## Why ArtfulBits Cross-Site Lookup Column?

Default SharePoint Lookup supports only lookup within the same site, so if you need to lookup data from another site, you cannot use it. **ArtfulBits Cross-Site Lookup** allows users to refer to a list from any site in site collection.

If you want to allow the user to select only some specific items (filtered by desired criteria), you can use filter enabling "Use filtering by list view" option in column settings.

If list contains large amounts of data, it is not very efficient to search for some data using standard SharePoint lookup. **ArtfulBits Cross-Site Lookup** with **Picker Dialog** helps to resolve this issue. You can search/filter data in picker dialog, which helps to find the required item quickly.

## 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 Cross-Site Lookup column you must select appropriate option in the list of available columns in the Create Column page. You can change default settings in the Cross-Site Lookup Special Settings section in order to adjust column mode to your needs. You can select the lookup information (site, list, and column) from the appropriate drop-down lists.

<b>Cross-Site Lookup Special Settings</b> Specify special Cross-Site Lookup options.	<p>Get information from this site: <div>ArtfulBits SiteColumns - 2 ▼</div></p> <p>Get information from: <div>Customers ▼</div></p> <p>In this column: <div>Address ▼</div></p> <p><input checked="" type="checkbox"/> Allow multiple values</p> <p><input type="checkbox"/> Use Picker Dialog</p> <p><input checked="" type="checkbox"/> Use filter by list view <div>All Items ▼</div></p> <p>Allow adding of items to the linked list (referenced list information is getting from):</p> <p><input checked="" type="radio"/> None</p> <p><input type="radio"/> Item is added using separate list New Form (display 'Add new item' link)</p> <p><input type="radio"/> Item is added on fly directly on current page (display TextBox and 'Add New Item' button)</p>
<b>Column Conversion</b> Allows to convert an existing SharePoint Lookup column to ArtfulBits Cross-Site Lookup column. All existing data will be kept and not affected.	<p>Select an existing Lookup column and click 'Convert' button to convert it to ArtfulBits Cross-Site Lookup column</p> <div><div>Select a Column... ▼</div><div>Convert</div></div>

You can enable adding of lookup items on the fly by choosing ***Item is added using separate list New Form*** or ***Item is added on fly directly on current page*** option.

You can also use picker dialog in the Cross-Site Lookup. It is needed to set corresponding check box in true. The following settings will be displayed.

#### Cross-Site Lookup Special Settings

Specify special Cross-Site Lookup options.

Get information from this site:  
ArtfulBits SiteColumns - 2 ▼

Get information from:  
Customers ▼

In this column:  
Address ▼

☒ Allow multiple values

☒ Use Picker Dialog

Available list columns:

Created	▲
Created By	
First Name	
First Name (linked to item)	
ID	
Last Name	
Modified	
Modified By	▼

Add >

< Remove

Show in picker dialog:

Title	▲
ID	

Up

Down

☒ Use filter by list view

All Items ▼

Allow adding of items to the linked list (referenced list information is getting from):

☒ None

☐ Item is added using separate list New Form (display 'Add new item' link)

☐ Item is added on fly directly on current page (display TextBox and 'Add New Item' button)

#### Column Conversion

Allows to convert an existing SharePoint Lookup column to ArtfulBits Cross-Site Lookup column. All existing data will be kept and not affected.

Select an existing Lookup column and click 'Convert' button to convert it to ArtfulBits Cross-Site Lookup column

Select a Column... ▼ Convert

Available columns are shown in the first list. You can select the values which will be present in the picker dialog.

## Release Notes

Version	Notes
v1.83 (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>
v1.82 (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>
v1.81 (December 2, 2011)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"><li>Fixed column value editing using Picker Dialog</li><li>Fixed minor issues</li></ul>
v1.8 (June 01, 2011)	<b>New Features:</b> <ul style="list-style-type: none"><li>Added default values support</li></ul> <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></ul>
v1.7 (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>
v1.6 (September 2, 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>
v1.5 (August 3, 2010)	<b>New Features:</b> <ul style="list-style-type: none"><li>Added Datasheet view support</li></ul>
v1.43 (July 8, 2010)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"><li>Fixed lookup to sub folder (column settings page issue)</li></ul>
v1.42 (June 23, 2010)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"><li>Fixed "Allow multiple values" property changing issue (from False to True)</li><li>Fixed error with 6622 Event ID in Event Viewer (Field type DummyField has duplicated definition)</li></ul>
v1.41 (June 11, 2010)	<b>New Features:</b> <ul style="list-style-type: none"><li>Improved Setup Wizard</li></ul> <b>Bugs Fixed:</b> <ul style="list-style-type: none"><li>Disabled ability of choosing DateTime and Number column as lookup target column for SharePoint 2007</li></ul>

v1.4 (May 28, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added ability to lookup data from subfolder</li> </ul>
v1.3 (May 13, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added ability to show additional fields (SharePoint 2010 only)</li> <li>Added relationships behavior: restrict or cascaded deleting (SharePoint 2010 only)</li> </ul> <b>Improvements:</b> <ul style="list-style-type: none"> <li>Added support DateTime and Number columns as target columns</li> <li>Lookup entries sorting during item editing</li> </ul>
v1.2 (April 22, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>SharePoint 2010 support added</li> </ul> <b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Sorting for lookup multiple values (disabled)</li> </ul>
v1.1 (February 1, 2010)	<b>Bugs Fixed:</b> <ul style="list-style-type: none"> <li>Problem with product version (Setup Wizard only)</li> </ul>
v1.1 (January 12, 2010)	<b>New Features:</b> <ul style="list-style-type: none"> <li>Added ability adding of lookup items on the fly</li> </ul> <b>Improvements:</b> <ul style="list-style-type: none"> <li>Improved picker dialog (Lookup or Title columns are selected by default)</li> <li>Improved column conversion (it is now easier and more clear)</li> <li>Improved Setup Wizard</li> </ul>
v1.0 (November 2, 2009)	<b>Initial Release</b>



## See Also



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### [Cascaded Lookup Column](#)

Cascaded Lookup Column allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.



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### [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.



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### [Column Data Adapter](#)

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



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### [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.



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### [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.



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### [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.



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### [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.



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### [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.



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### [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.

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#### **[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.