Cascaded Lookup 6.0

User Guide

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1. Product Introduction

SharePoint Cascaded Lookup greatly enhances default SharePoint's lookup functions. It reduces wait times as lookup results are filtered according to parameters that you set. Column relationships between parent and child columns can be established so that data selected in parent fields will determine options presented in the child fields.

This user guide is used to instruct and guide users in installing and configuring Cascaded Lookup on their SharePoint environment.

For the latest version of this user guide or other user guides, please visit:

http://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the Cascaded Lookup zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Cascaded Lookup_V6_User Guide.pdf	User guide for Cascaded Lookup in PDF format.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\ CascadedLookup\ BoostSolutions.CascadedLookupSetup15.6.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\ CascadedLookup\ BoostSolutions.CascadedLookupSetup_v6_16.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2016.

Solutions\ CascadedLookup\ BoostSolutions.CascadedLookupSetup_v6_19.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2019/Subscription Edition.
Solutions\ CascadedLookup\ Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Cascaded Lookup, ensure your system meets the following requirements:

SharePoint Server Subscription Edition

Operating System	Microsoft Windows Server 2019 Standard or Datacenter Microsoft Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Microsoft Windows Server 2016 Standard or Datacenter Microsoft Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 and above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6

Browser	Microsoft Internet Explorer 10 or greater
	Microsoft Edge
	Mozilla Firefox
	Google Chrome

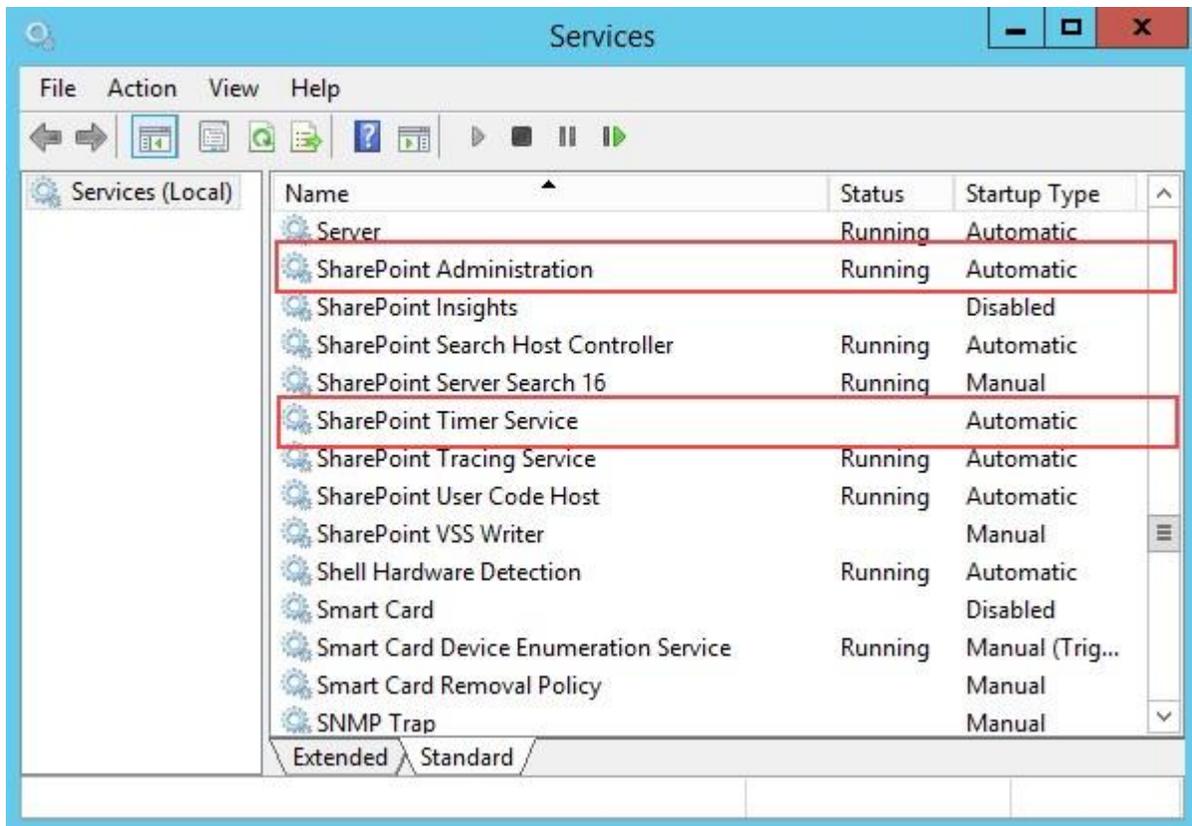**SharePoint 2013**

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64
	Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013
	Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or greater
	Microsoft Edge
	Mozilla Firefox
	Google Chrome

2.3 Installation

Follow these steps to install Cascaded Lookup on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.

Cascaded Lookup must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** → **System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Cascaded Lookup on SharePoint server.

a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> *Note*
>
> If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

c.   A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d.   Review and accept the End-User License Agreement and click **Next**.

e.   In the Web Application Deployment Targets, select the web applications you are going to install and click **Next**.

> *Note*
>
> If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f.   Upon completion of the installation, details are displayed showing which web applications you product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Cascaded Lookup in SharePoint 2016 by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Cascaded Lookup to SharePoint servers.

a.   Extract the files from the product zip pack to a folder on one SharePoint server.

b.   Open a command prompt and make sure your path is set with the SharePoint bin directory.

c.   Add the solution files to SharePoint in the STSADM command line tool.

stsadm -o addsolution -filename BoostSolutions.CascadedLookupSetup_v6_16.wsp

stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp

d.   Deploy the added solution with the following command:

stsadm -o deploysolution -name BoostSolutions.CascadedLookupSetup_v6_16.wsp - allowgacdeployment –url [virtual server url] –immediate

stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.wsp -allowgacdeployment – url [virtual server url] –immediate

e.   Wait for the deployment to complete. Check the final status of the deployment with this command:

stsadm -o displaysolution -name BoostSolutions.CascadedLookupSetup_v6_16.wsp

stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp

The result should contain a <Deployed> parameter for which the value is TRUE.

f.   In the STSADM tool, activate the features.

stsadm -o activatefeature -name SharePointBoost.CascadedLookup –url [site collection url] –force

stsadm -o activatefeature -name SharePointBoost.CascadedLookupDataAdapter –url [site collection url] –force

stsadm -o activatefeature -name SharePointBoost.CascadedLookup.CA –url [site collection url] – force

To remove Cascaded Lookup from SharePoint servers.

a.   Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.CascadedLookupSetup_v6_16.wsp -immediate -url [virtual server url]

b.   Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.CascadedLookupSetup_v6_16.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c.   Remove the solution from the SharePoint solutions storage:

> *stsadm -o deletesolution -name BoostSolutions.CascadedLookupSetup_v6_16.wsp*

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

a. Removal is initiated with the following command:

> *stsadm -o retractsolution -name BoostSolutions.FoundationSetup16.1.wsp –immediate –url [virtual server url]*

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

> *stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp*

> The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

> *stsadm -o deletesolution -name BoostSolutions.FoundationSetup16.1.wsp*

2.7 Feature Activation

### Activate Cascaded Lookup's features in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

a. Select Settings and then select **Site Settings**.

b. Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

BoostSolutions Cascaded Lookup 6.2.0.409

Look up and concatenate information from any site in the site collection. Use column data to filter information and cross-reference entries on different sites. (Powered by BoostSolutions)

Deactivate   Active

Activate Cascaded Lookup's features in Central Administration

a. Using the Quick Launch click **Application Management**.

b. On the Application Management page, under Manage Applications, click **Manage Web applications**.

c. Select a web application you want to configure and click **Manage Features** on the ribbon.

d. Find Cascaded Lookup's features and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.
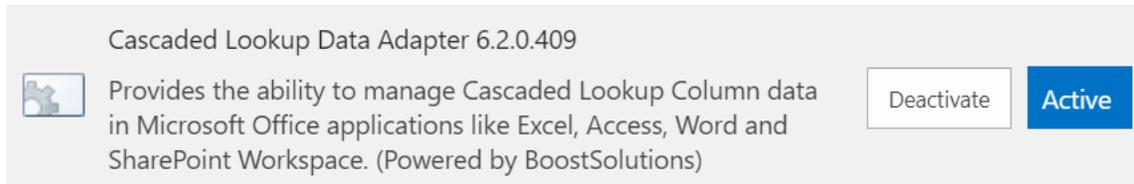
3. Manage Cascaded Lookup Column

3.1 Settings for Cascaded Lookup

After you install Cascaded Lookup on your SharePoint server, a **Cascaded Lookup** column type will be available in the **Create Column** page.

3.1.1 General Settings

The General Settings section allows you to specify the target column, which is used to get information from.

- **Get information from this site**

  Specify the target site which contains the target list. This dropdown list shows all the sites in the current site collection. You can select any site from the dropdown list.

- **Get information from this list**

  Specify a target list which you retrieve information from. This dropdown list shows all the available lists in the site you selected.

- **In this column**

  Select a target column which you want to get information from. A target column contains data for your Cascaded Lookup dropdown list.

> **Note**
>
> Supported target column types include: Single Line of Text, Number, Date and Time, Calculated (output is single line of text), ID, Modified, Created, and Version, Name.

- **Allow multiple values**

  Specify if the users can select multiple values in Cascaded Lookup column. This option will determine the style of displaying related columns (for more information, refer to Chapter 3 section 3.1.3 Appearance Settings).

  ☑ Allow multiple values

- **Default value**

  Specify the default value for Cascaded Lookup column so users can select a default value.

  Default value:
  - ⦿ (None)
  - ○ The first value
  - ○ Customize value

  None: Set the default value as none.

  First value: Set the first value of the target column as the default value.

  Customize value: Set a value as the default value. The value you enter should be one of the lookup values or the default value will be none.

- **Make this a dependent column**

  In this section, you can establish cascading behavior and enable this field to be filtered by other fields in this list.

  ⊟ Cascading

  ☑ Make this a dependent column

  Parent column in this list:
  Country ▼

  Filter by column in Target list:
  Country ▼

  ➕ Add more columns

Parent column in this list

The parent column is located in the current list and connects with the filter column in order to filter column values (for example a "City" dropdown list is filtered by a "Country" field in the same list).

> **Note**
>
> Supported parent column types include: Choice (except filled in value mode), SharePoint Lookup, Cross-Site Lookup, Cascaded Lookup.

Filter by column in Target list

This column is located in the target list and is comparable to the parent column in order to filter displayed values.

> **Note**
>
> Supported filter column types include: Choice, Single Line of Text, SharePoint Lookup (single value and source column is not Number or Date and Time), Cross-Site Lookup (single value and source column is not Number or Date and Time), Cascaded Lookup (single value and source column is not Number or Date and Time).

- **Retain values in child column when changing parent column value**

  Select this checkbox to to keep the values in the child columns when you change the parent column value.

3.1.2 Filter Settings

In this section, you can specify whether users can filter values based on a selected view or other column values.

- **All items**

  Show all items of the target list.

- **Filter items by view**

  Only show the items contained in the selected view. This dropdown list shows all available public views.

  You can set the order of the items in the Cascaded Lookup dropdown list by selecting the **Use selected view for sorting items** check box.
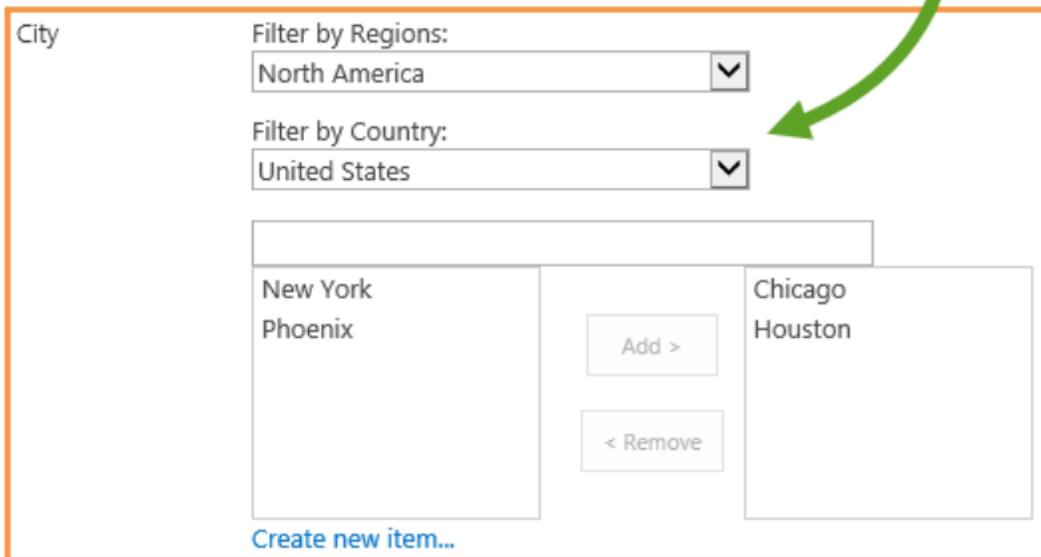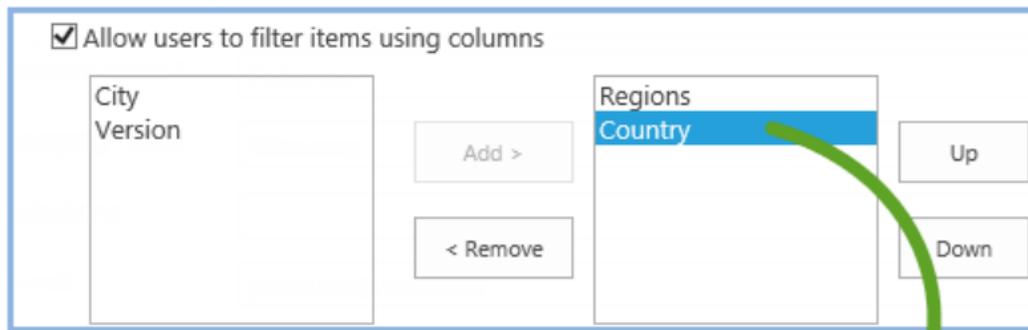
  > *Note*
  >
  > The order of the columns values will be same as the order of the items which you set in the view settings.
  >
  > By default it is organized by alphabetical.

- **Allow users to filter using columns**

  Allow users to filter values based on selected columns. Select a column and click **Up** or **Down** to change the column order on the Item Edit form.

3.1.3 Appearance Settings

In this section, you can select the related columns which you want to show on the View/Edit form and the style of displaying these columns.
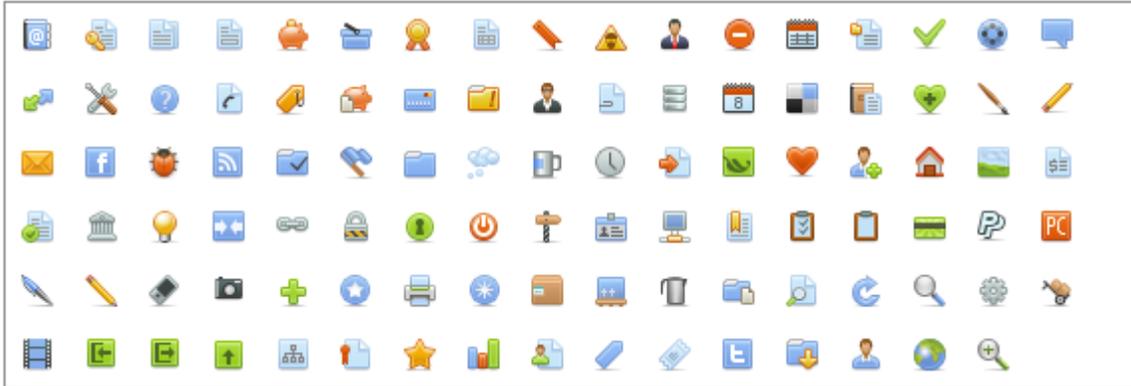

- **Display an icon for this column**

    Display an icon along with the Cascaded Lookup column, making it easier to identify. After you specify an icon, it will be shown in the View Item form as follows:

    None: Do not show any icons.

    Choose an icon below: Choose a predefined icon.

Enter the image web address: Specify a URL of the image.

> *Note*
>
> If you look up a document Name column from a document library, the icons will be shown as the document type icons.

- **Show related columns on View/Edit form**

  Select the columns from the target list which you want to show in table view on the View/Edit form.

  To change the display order, select the column in the right box and click **Up** or **Down**.

- **Specify a style to display related columns**

  There are 3 styles provided: Dropdown list, Left to right box and Table view and Item Picker.

  Dropdown list is only available for a single value (do not select Allow multiple values in General Settings).

The related columns can be shown in Dropdown list style in the Item Edit form, but cannot be shown in the Item View form.

Country   United States, 1   ▾
                 Create new item...

Left to right box is available for multiple values.

The related columns can be shown in Left to right box style in the Item Edit form, but cannot be shown in the Item View form.

Country

Canada, 1		United States, 1
China, 86	Add >	Singapore, 65
Colombia, 57	< Remove	

Create new item...

Table view is available for multiple values; the values are displayed in a grid.

Country		Country	Country Code
	🌐	United States	1
	🌐	Singapore	65

For Table view, you can specify whether the paging function is available and the paging size.

Specify a style to display related columns:

Table view   ▾

☑ Allow paging
   Page size 15   ▾

Item Picker is similar with People picker control which enables you to query and select the item(s).

Once you type a character, the related items will be shown as following, checking the checkboxes to choose the items.

City

a	

☐ San Diego

☐ Los Angeles

☐ San Francisco

3.1.4 Additional Fields

This function allows you to add more columns to the lookup that will be displayed only in the list view page.

⊟ Additional Fields

Add a column to show each of these additional fields:

☐ Company Name

☐ City

☐ Country

☐ Company Name(linked to item)

☐ Web Site

☐ Address

☐ Telephone

☐ Fax

☐ Zip code

3.1.5 Miscellaneous Settings

Cascaded Lookup provides you with the following five options in the Miscellaneous settings section to make your cascading more efficient.

☑ Enable creating a new item in the target list
Text to display:

Create new item...

☐ Show an empty field when no items match the filter criteria

☐ Remove duplicate items from the dropdown list

☐ Remove link in list view

☐ Utilize this column for calculations and lookup (In the Calculated column , insert lookupColumnName_cal in the formula.)
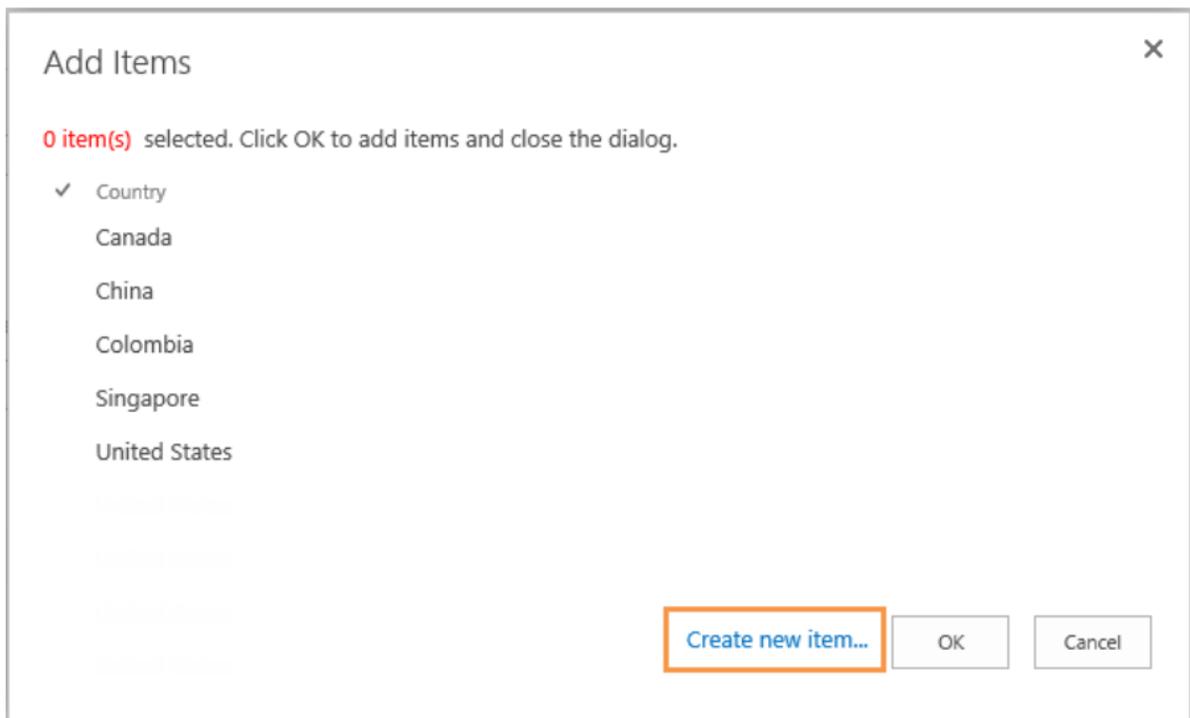
- **Enable creating a new item in the target lookup list**

    When you select this checkbox, you can add new items in the target list. The following link will be added below the lookup field:

    You can customzie the text of creating a new item link.

    Please note that the "Create new item…" link is also available on table view when you select target items.

- **Show an empty field when no items match the filter criteria**

    Check this box to display an empty field when no items match the filter criteria.

- **Remove duplicate items from the dropdown list**

    Check this box to display one item when duplicate items exist.

- **Remove link in List View**

    Remove the link of Cascaded Lookup column in the list view and the View Item form.

- **Utilize this column for calculations**

    Specify if this cascaded lookup column can be used for calculations in the Calculated column. This option is only available for single value (unselect Allow multiple values option).

Once you select this option, a new column (lookupColumnName_cal) will be created, and you can insert this column in the formula for Calculated column.

Formula: Insert Column:

```
=No.*Price_cal
```

Created
Modified
No.
Order ID
Price_cal

Add to formula

3.1.6 Target Column Settings

This setting enables you to define a bi-directional connection between the current list and the target list.

If you want to use an existing Cascaded Lookup column as a reverse lookup field, choose the **Select a reverse lookup field in the target list** option.

⦿ Select a reverse lookup field in the target list
  Company   ▼
◯ Create a reverse lookup field in the target list

Select **Create a reverse lookup field in the target list** if you want to create a reverse lookup column in the target list

You need to configure these settings in the Target column settings section:

a.   Specify a column name for this reverse lookup column.

b.   In the dropdown list, select a column which you want to look up from target list to current list.

Select a reverse lookup field in the target list
None

Create a reverse lookup field in the target list

Column name:

Company

In this column:

Company Name

Allow multiple values

c. Specify the appearance you want to display on the target list (for more information refer to Chapter 3 section 3.1.3 Appearance Settings)

3.2 Create a Cascaded Lookup Column

To create a Cascaded Lookup column, you must have design permission level for the list or library or be a member of the default SharePoint Designer group.

a. Enter the list or library that you want to create a Cascaded Lookup column for.

b. On the Ribbon, click the **List** or **Library** tab and then click **Create Column** in the Manage Views group.

c. A Create Column dialog box will open.

    I. In the **Name and Type** section, enter a name for your Cascaded Lookup column in the **Column name** box.

    II. Under **The type of information in this column is**, select Cascaded Lookup.

    III. Under **General Settings**, specify the target information for your lookup column. You can also select **Allow multiple values** if you need to enable multiple values in your lookup column.

       To build a cascading relationship, click **Make this a dependent column**, and specify the Filter column and the Parent column. You can add multiple filters by clicking **Add more columns**.

⊟ General Settings

Get information from this site:

[Product Market ▾]

From this list:

[Country ▾]

In this column:

[Country ▾]

☐ Allow multiple values

Default value:

◉ (None)

◯ The first value

◯ Customize value

[   ]

⊟ Cascading

☐ Make this a dependent column

Parent column in this list:

[Location ▾]

Filter by column in Target list:

[Country ▾]

➕ Add more columns

☐ Retain values in child column when changing parent column value

IV.   Under the **Filter**, you can specify whether users can filter values based on the selected view or other column values.

⊟ Filter

◯ All items

◉ Filter items by the following view:

[All Items ▾]

☑ Use selected view for sorting items

☐ Allow users to filter items using columns

V.   Under the **Appearance**, specify a style to display related columns, you can also specify an icon to display in the Cascaded Lookup column.

VI.   Under the **Miscellaneous**, select the functions you want.

VII.   The Target Column Settings section is optional. To enable this feature, click **Create a reverse lookup field in the target list** option. (For more details, refer to Chapter 3 section 3.1.6 Target Column Settings)

d.   Click **OK** to save settings.

3.3 Edit a Cascaded Lookup Column

You can change the settings for a Cascaded Lookup column. But just like the SharePoint Lookup Column, you cannot edit the column type, target site or the target list.

a. Enter the list or library that contains the Cascaded Lookup column you want to edit.

b. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.

c. On the List Settings or Library Settings page, under the **Columns** section, click the name of the Cascaded Lookup column that you want to edit.

d. Change the settings that you want and then click **OK**.

3.4 Delete a Cascaded Lookup Column

This procedure deletes the Cascaded Lookup column and any data in this column. You cannot restore the Cascaded Lookup column from the Recycle Bin once it has been deleted.

a. Enter the list or library that contains the Cascaded Lookup column you want to edit.

b. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.

c. On the List Settings or Library Settings page, under the **Columns** section, click the name of the Cascaded Lookup column that you want to delete.

d. Scroll to the bottom of the **Change Column** page and then click **Delete**.

e. When prompted, click **OK**.

3.5 Convert Column

This function allows you to convert columns from Cascaded Lookup, Cross-Site Lookup and SharePoint Lookup column without creating new lookup columns. Converting will keep the Cascaded Lookup settings when converting into a SharePoint Lookup column.

3.5.1 Convert SharePoint Lookup to Cascaded Lookup

This function helps you to convert OOTB SharePoint Lookup column into Cascaded Lookup column.

a. Enter the list you want to convert, click **List** in the ribbon, and then click **List Settings**.

b. Under the **General Settings** section, click **Convert Lookup Column (Powered by BoostSolutions)**.

c.   In the Convert Lookup Column page, select **Lookup Columns -> Cascaded Lookup Columns** from the dropdown list.

d.   Select the Lookup columns you want to convert into Cascaded Lookup columns and click **OK**.

Select Column

Select a column you would like to convert into a Lookup column or a Cascaded Lookup column.

Lookup Columns -> Cascaded Lookup Columns ⌄

☑ Lookup

e.   Cascaded Lookup columns are created in the list and can be found in the **Columns** section.

f.   You can modify the settings of this Cascaded Lookup column.

3.5.2 Convert Cascaded Lookup to SharePoint Lookup

This function helps you to convert a Cascaded Lookup column into an OOTB SharePoint Lookup column.

a.   Enter the list you want to convert, click **List** in the ribbon, and then click **List Settings**.

b.   Under the **General Settings** section, click **Convert Lookup Column (Powered by BoostSolutions)**.

c.   In the Convert Lookup Column page, select **Cascaded Lookup Column -> Lookup Column** from the dropdown list.

d.   Select the Cascaded Lookup columns you want to convert into Lookup columns and click **OK**.

e.   SharePoint Lookup columns are created in the list and can be found in the **Columns** section.

4. Using the Cascaded Lookup Column

4.1 Create a Relationship Using the Single-select Lookup Field

Sometimes you need a column to be filtered by another column in the same list or library. We will use the classic example "Region > Country > City" in this scenario.

We have the following two list:

Customer Locations - Lists all the Regions, Countries and Cities; this is the target list.

Account - Lists all the customers' information. In this example we will create the Cascaded Lookup column in this list.

The following shows the 3 Cascaded lookup columns:

- **Region**

In the Account list, create a Cascaded Lookup column called Region. This column is connected to the "Regions" column in the Customer Locations list.

☐ General Settings

Get information from this site:
Product Market

From this list:
Customer Locations

In this column:
Region
☐ Allow multiple values

- **Country**

Create a Cascaded Lookup column called Country in the Account list. This column is connected to the "Country" column in the Customer Locations list.

Select **Make this a dependent column** option and select Region both in the Parent column in this list and Filtered by column in the Target list options.

General Settings

Get information from this site:

Product Market

From this list:

Customer Locations

In this column:

Country

☐ Allow multiple values

Default value:

◉ (None)

○ The first value

○ Customize value

Cascading

☑ Make this a dependent column

Parent column in this list:

Region

Filter by column in Target list:

Region

- **City/State**

Create a Cascaded Lookup column called City/State in the Account list. This column is connected to the "City/State" column in the Customer Locations list.

Select **Make this a dependent column** option, and select Country both in the Parent column in this list and Filtered by column in the Target list options.

⊟ General Settings

Get information from this site:

Product Market ▼

From this list:

Customer Locations ▼

In this column:

City/State ▼

☐ Allow multiple values

Default value:

◉ (None)

○ The first value

○ Customize value

⊟ Cascading

☑ Make this a dependent column

Parent column in this list:

Country ▼

Filter by column in Target list:

Country ▼

4.2 Create a Relationship Using the Multiple-select Lookup Field

Sometimes you need a column to be filtered by multiple columns in another list or library. We will use the following scenario:

We have the following two list:

Customer Locations - Lists all the Regions, Countries and Cities; this is the target list.

Account - Lists all the customers' information. In this example we will create the Cascaded Lookup column in this list.

The following shows the Cascaded lookup column:

Account Name *   Peter Lee

Company Name   Mixo.com

Telephone

E-mail   peter.lee@mixo.com

Customer ID

City   Filter by Regions:
North America
"City" is filtered by the selected region and country.
Filter by Country:
United States

New York
Phoenix

Add >

Chicago
Houston

< Remove

Create new item...

In the **General Settings** section, select the Customer Locations list and select the City column from the target list.

General Settings

Get information from this site:
Customer Center

From this list:
Customer Locations

In this column:
City
☑ Allow multiple values

In the **Filter** section, select **Allow users to filter items using columns** option and select Regions and Country for filtering.

4.3 Create a Reverse lookup column using Cascaded Lookup

There are two lists: Account and Orders.

Account – Record customers information, include Account Name, Company, Customer ID and other details.

Orders – Record orders information. This list will lookup customer's information from the Account list.

Orders

(+) **new item** or edit this list

All Items   ••• | Find an item   🔍 |

✓	Order ID		Account Name	Company	Product
	ORD-111-A3E7 ✳	•••	Annie Walker	Dreamit.com	ShareDoc
	ORD-111-A3E8 ✳	•••	Ben Brown	ShareInfo	DocMerger
	ORD-111-A3E9 ✳	•••	Chris Liu	Weemi.cn	ShareDoc
	ORD-111-A3E1 ✳	•••	Peter Lee	Mixo.com	DocViewer
	ORD-111-A3E5 ✳	•••	Annie Walker	Dreamit.com	ShareDoc

In this example, we will create a reverse lookup column in Account list, which is used to create a bidirectional relationship between order and customer.

In the Orders list, create a Cascaded Lookup. Under the **General Settings** section, select the Account list and Account Name column from the list.

⊟ **General Settings**

Get information from this site:

| Customer Center | ▼ |

From this list:

| Account | ▼ |

In this column:

| Account Name | ▼ |

☐ Allow multiple values

In the **Target Column Setting** section, check the **Create a reverse lookup field in the target list**.

In **Column Name**, enter the Order ID and in **In this column**, select the Order ID from the dropdown list. Check the **Allow multiple values** box.

☑ Create a reverse lookup field in the target list

Column name:

| ID |

In this column:

| ID | ▼ |

☑ Allow multiple values

# 5. Manage Column Data with Microsoft Office Applications

By default, SharePoint can only manage column data in Microsoft Office applications. Cascaded Lookup 4.0 and above provides a new **Data Adapter** Web Application feature that enhances the functionality of SharePoint with the ability to manage Cascaded Lookup columns in **Microsoft Excel**, **Microsoft Access**, **Microsoft Word** and **SharePoint Workspace**.

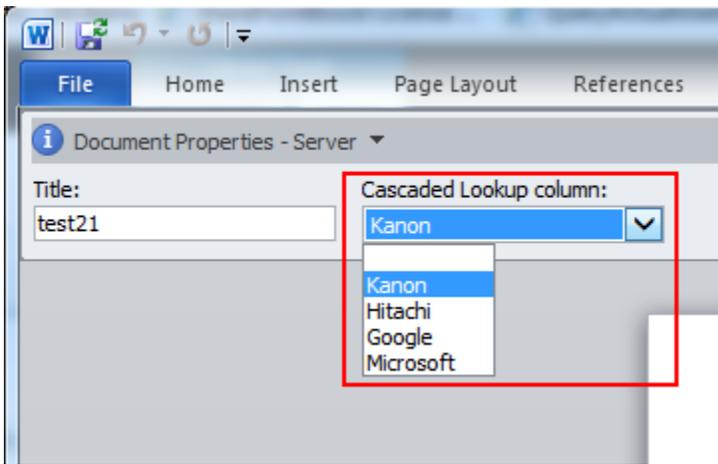To activate the Cascaded Lookup Data Adapter feature, please see section *2.7 Feature Activation*.

- **Microsoft Excel**
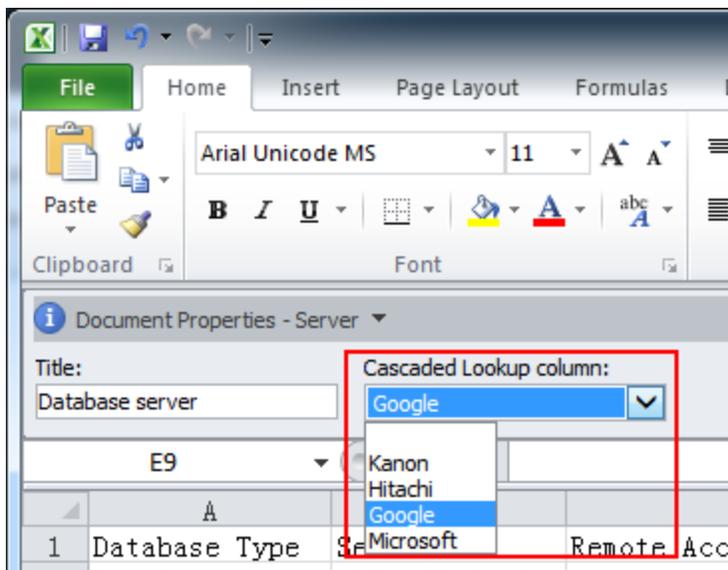
- **Microsoft Access**
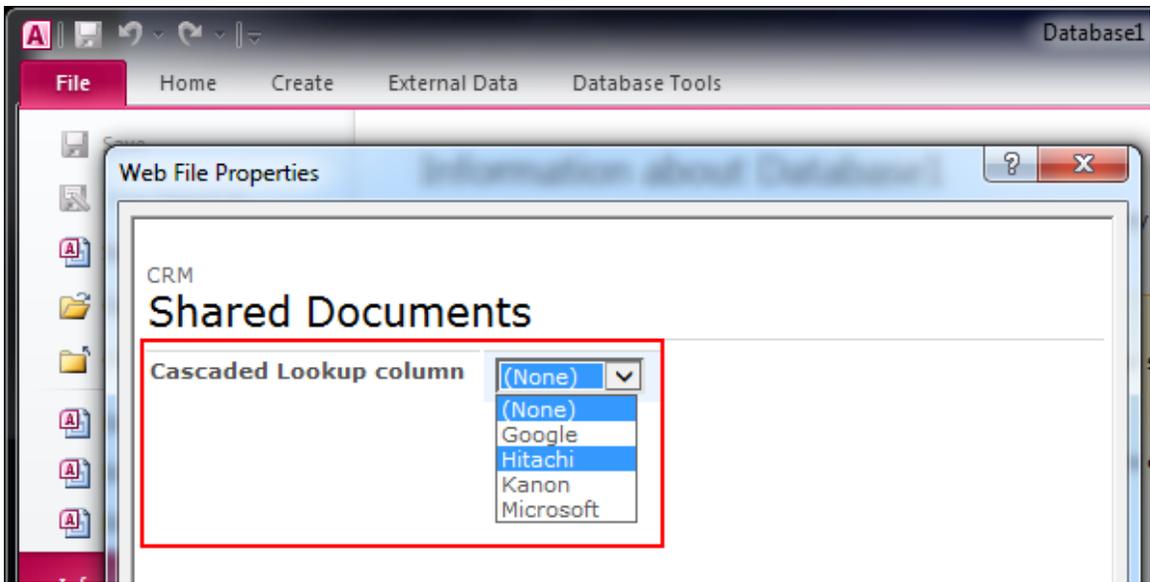
- **Microsoft Word**

- **SharePoint Workspace**
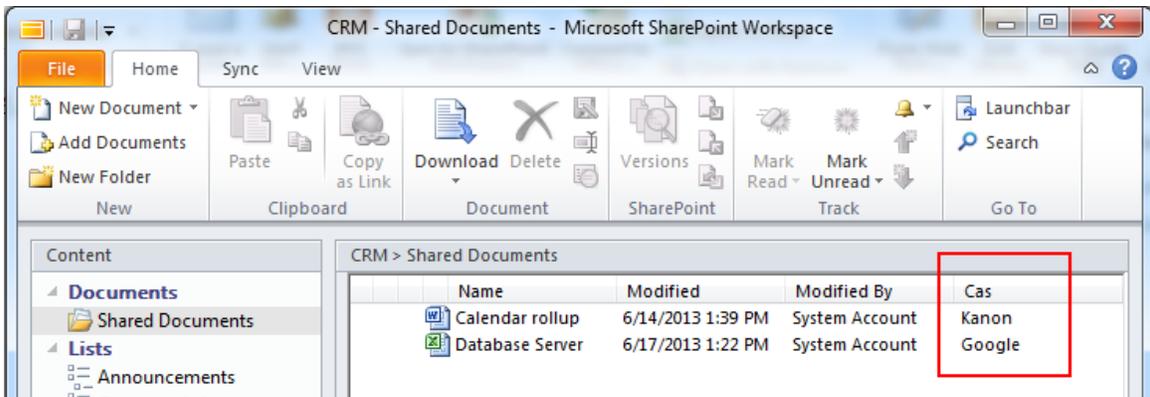
6. Technical Limitations

Cascaded Lookup has the following limitations:

- Cannot use the cascading function when using datasheet view.

- Cannot use the cascading function in Microsoft Office applications.

- Cannot edit column values in Microsoft Access when using Cross-Site lookup.

- When the multiple values function is enabled for Cascaded Lookup columns, it will only display the lookup item ID in Microsoft Access.

- When the multiple values function is enabled for Cascaded Lookup columns, it cannot be managed in Microsoft Word.

- In datasheet view mode, the Cascaded Lookup & Cross-Site Lookup column cannot be edited in SharePoint 2013.

7. Troubleshooting & Support

Troubleshooting FAQ:

https://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Appendix 1: Glossary

Target List – a list where Cascaded Lookup will refer to for information. The target List can be in any site in the current site collection.

Target Column – a column located in the target List. It contains data for your drop-down menu.

Filter Column - located in the target List, it is used to filter out irrelevant data from the target Column and is also available as a drop-down menu.

Parent Column - located in current list (the list where you want to add look up information).

Appendix 2: License Management

You can use Cascaded Lookup without entering any license code for a period of 30 days from when you first use it.

To use product without limitation, you will need to purchase a license and register the product.

Finding License Information

a. In the products main page, click the trial link and enter the **License Management Center**.

b. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

c. Send the above information to us (sales@boostsolutions.com) to generate a license code.

License Registration

a.   When you receive a product license code, enter the **License Management Center** page.

b.   Click **Register** on the license page and a **Register or Update license** window will open.

c.   Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.
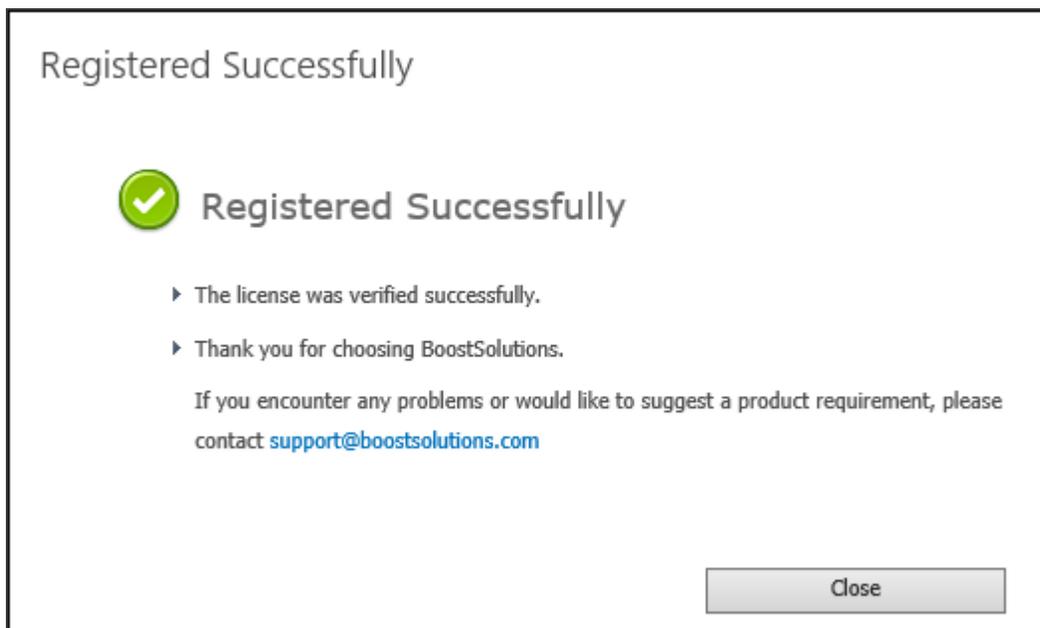
For more details on license management, see the BoostSolutions Foundation.