



SharePoint Cascading Lookup Plus Field Type





Copyright © 2005-2014 KWizCom Corporation. All rights reserved.

Company Headquarters

KWizCom
95 Mural Street, Suite 600
Richmond Hill, Ontario
L4B 3G2, Canada

E-mail: info@KWizCom.com

Web site: <http://www.KWizCom.com>

Sales

E-mail: sales@KWizCom.com

Telephone: +1-905-370-0333

Fax: +1-905-784-1153



Table of Contents

Introduction	4
Overview.....	5
SharePoint out-of-the-box Lookup Field.....	5
So why do we need KWizCom Cascading Lookup Field?	6
Using the Cascading Lookup Plus Field.....	8
Display Modes in New/Edit list forms	8
How the field is displayed in View mode	10
Cascading Behavior	11



Introduction

KWizCom Cascading Lookup Plus Field Type is a SharePoint field type that enhances the capability of lookup fields in SharePoint and provides a cascading, cross-site, two-way lookup field.

KWizCom SharePoint Cascading Lookup Plus Field is compatible with SharePoint 2007/2010/2013 Server and WSS/Foundation.

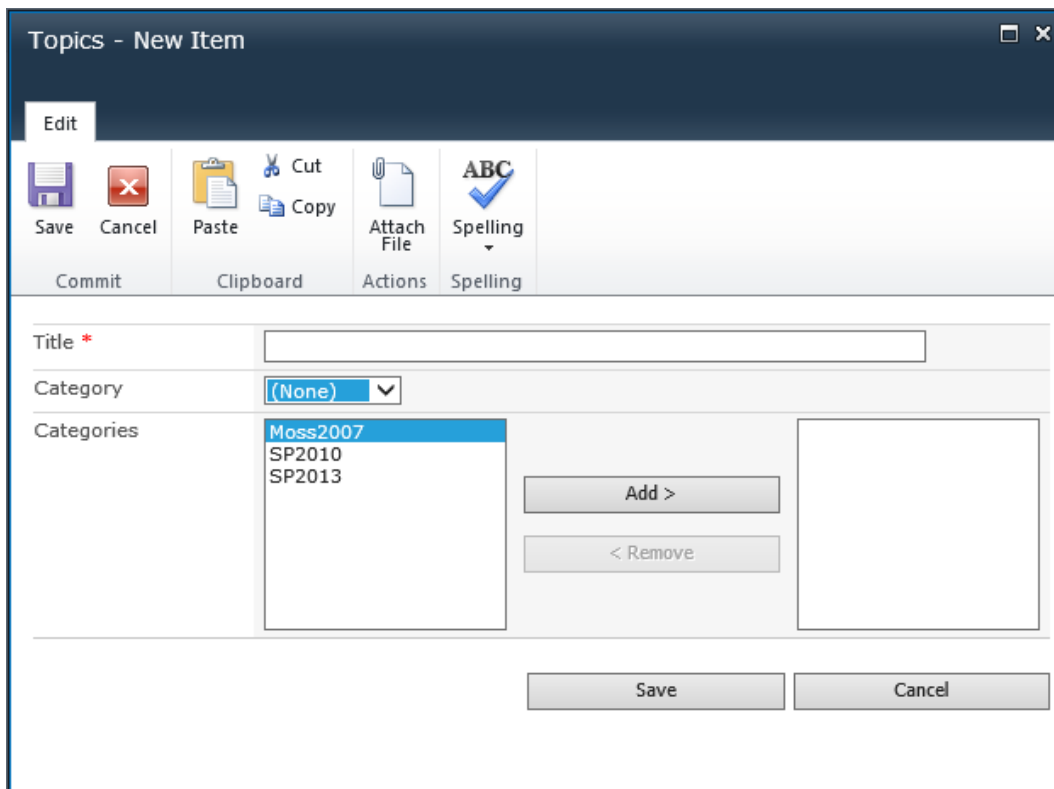
This User Guide provides all the information you need in order to use the product, after it has been deployed and configured by your SharePoint/Site administrator.

Overview

SharePoint out-of-the-box Lookup Field

A Lookup field is a field in a SharePoint list/library that shows values that are actually stored in another SharePoint list.

SharePoint out-of-the-box has a Lookup field. To end-users that Lookup field appears as a Drop-Down field or as a pair of lists as you can see in the following screenshot:



When the field appears as a Drop-Down ("Category" field in the screenshot), it enables you select a single value. When the field appears as a pair of lists ("Categories" field in the screenshot), you can select multiple values by using the "Add" button to move the selected options from the left list to the right list.

So, a lookup field enables users to select a single or multiple values from an existing set of values. These values are actually stored in another list, to which this Lookup field is connected.

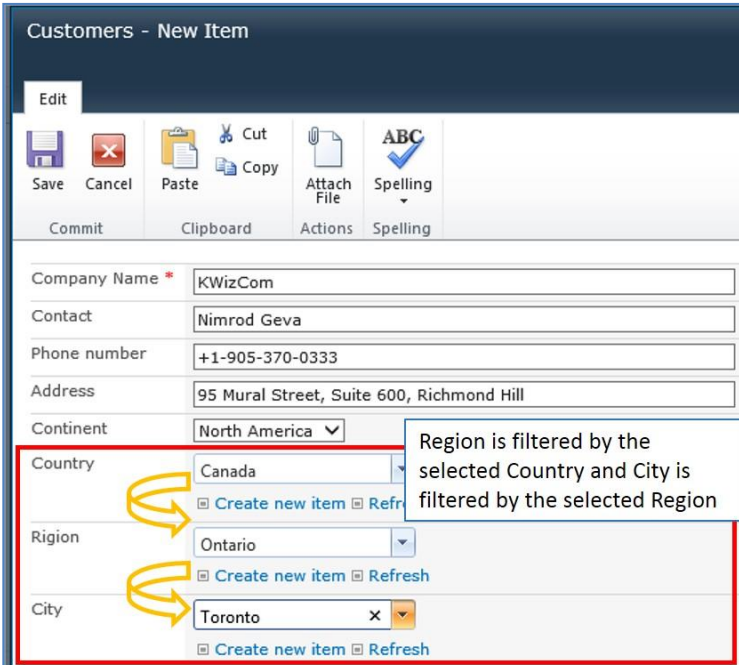
The way the field is displayed, and the list to which it is connected – these are all defined by your SharePoint administrator when he configures this field.

So why do we need KWizCom Cascading Lookup Field?

The SharePoint **Cascading Lookup Plus Field type** is a custom lookup field type that brings added capabilities that implementers found lacking in out of the box SharePoint Lookup field:

- **Ability to implement Cascading fields**

Cascading fields are fields that one filters the other, such as the Country>Region>City common example:



- **Cross-site lookups**

SharePoint Lookup field can only be connected to a list on the same site. The KWizCom Cascading Lookup field enables connecting it to remote lists which are located in other sites.

- **Filtered lookups**

The Cascading Lookup field can be configured to display only a subset of the list to which it is connected. This enables displaying different options to different users, according to various logic rules.



- **Bi-directional lookup**

By using the Cascading Lookup field, navigation between connected items becomes much easier!

Like other solutions such as CRM for example, when you have a lookup field that connects an Order item to a Customer who made the order, you will be able to go to that Customer's item and see there all the orders that he made. This is possible thanks to the fact that the Cascading Lookup field automatically creates a bi-directional connection between any 2 connected lists (SharePoint out-of-the-box maintains only a 1-directional connection).

Real solutions that include sophisticated data models are now just a click away!

Using the Cascading Lookup Plus Field

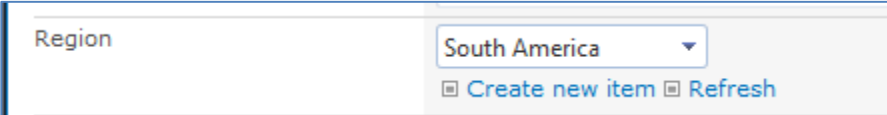
Display Modes in New/Edit list forms

The KWizCom Cascading Lookup Plus field can be configured to appear in various ways in item's New/Edit forms, according to your functional needs.

The field includes the following display options:

Drop-Down

When the field is configured to display a Drop-Down control, it will appear like this in the New/Edit item forms:



The screenshot shows a form field with the label "Region". To the right of the label is a drop-down menu currently displaying "South America". Below the drop-down menu are two links: "Create new item" and "Refresh".

Below the Drop-Down, you have 2 links:

- Create new item – When clicking this link, you'll be able to create a new item in the lookup list.

In the screenshot above, the "Regions" Cascading Lookup field is connected to a list called "Regions". By clicking the "Create new item" link, you can create a new region without having to actually go to the Regions list – this saves a lot of time!

- Refresh – Click this link to refresh the content of the Cascading Lookup field. When do you need to do that?

You may want to refresh the drop-down field if for example, you are editing a list item for a long time, and during that time someone else maybe has updated the lookup list (in our example, added some regions to the Regions list). Refreshing the field will enable you to see new items that have been added by someone else while you were editing this current item.

Grid

When the field is configured to display a Grid control, it will appear like this in the New/Edit item forms:

City/State	Selected	Title	Region	Country
	<input type="checkbox"/>	Barcelona	Europe	Spain
	<input checked="" type="checkbox"/>	Madrid	Europe	Spain

Create new item
 Clear Selection
 Refresh

When you are in an item's New/Edit form, you select items in the Grid by simply checking the checkboxes of the items you want to select.

As you can see, The Grid mode is different than the Drop-Down mode and provides some additional capabilities:

- **You now can see several columns from the lookup list-**
 (With the Drop-Down you can see only a single column).
 Your SharePoint admin configures the grid and he is the one who defines which exact columns appear in the grid.
- **You can select multiple items in the grid-**
 This mode enables you to connect multiple lookup items to your item.

The Grid mode is often used in scenarios where the lookup list (to which the Cascading Lookup field is connected) has many items (hundreds or thousands), in this case the grid mode allows the 'Edit by request' option, which displays the selected items in the grid in view mode (empty selection for new item form), the grid switches to edit mode by simply clicking the 'edit selection' option below.

Below the Grid you also have the following options:

- Create new item – When clicking this link, you'll be able to create a new item in the lookup list.
 In the screenshot above, the "Regions" Cascading Lookup field is connected to a list called "Regions". By clicking the "Create new item" link, you can create a new region without having to actually go to the Regions list – this saves a lot of time!
- Clear Selection – Click this link to clear all checked checkboxes in the Grid (Undo your selections)

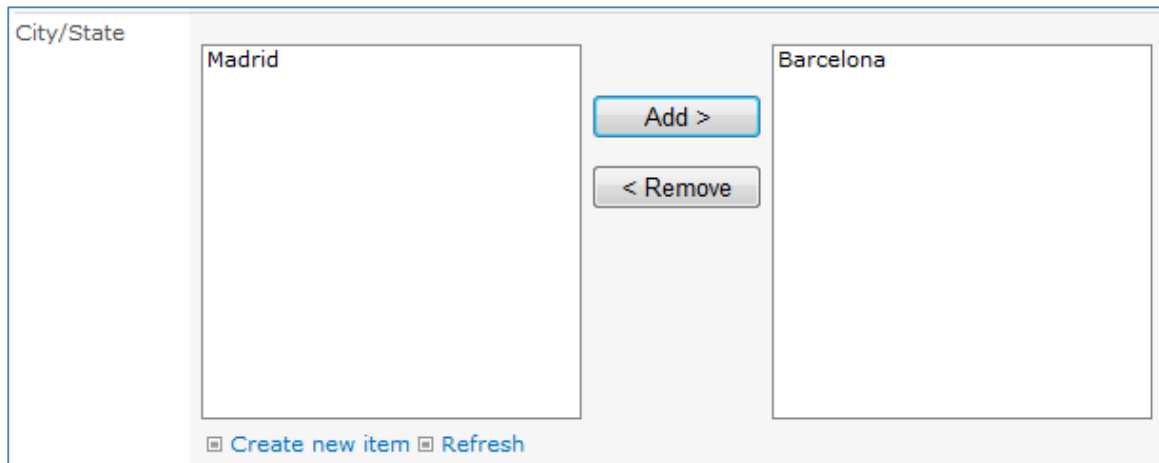
- **Refresh** – Click this link to refresh the content of the Cascading Lookup field.

When do you need to do that?

You may want to refresh the drop-down field if for example, you are editing a list item for a long time, and during that time someone else maybe has updated the lookup list (in our example, added some regions to the Regions list). Refreshing the field will enable you to see new items that have been added by someone else while you were editing this current item.

Pair of lists


In this mode the Cascading Lookup field appears like this:



This type of control, Like the Grid, allow you to select multiple items. You do so by selecting items in the left list and by clicking "Add" you move them to the right list, which shows the items that you've selected.

How the field is displayed in View mode

When opening a list item's View form, regardless of the Cascading Lookup field's display mode in Edit form (Drop-Down, Grid or pair of lists), it will always display a grid in the item's View form as you can see in the following screenshot:

City/State			
	Title	Region	Country
	Vienna	Europe	Austria

Cascading Behavior

Sometimes you need a field to be filtered by another field in the same list.

The classic example is the "Region>Country>City" scenario:

In the following screenshot you see an Edit item form that includes 3 Cascading Lookup fields:

Full Name *	KWizCom Corp.																			
Phone Number	905-370-0333																			
Region	North America <input type="button" value="Create new item"/> <input type="button" value="Refresh"/>																			
Country	Canada <input type="button" value="Create new item"/> <input type="button" value="Refresh"/>																			
City/State	<table border="1"> <thead> <tr> <th>Selected</th> <th>Title</th> <th>Region</th> <th>Country</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Markham</td> <td>North America</td> <td>Canada</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Ottawa</td> <td>North America</td> <td>Canada</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Toronto</td> <td>North America</td> <td>Canada</td> </tr> </tbody> </table> <input type="button" value="Create new item"/> <input type="button" value="Clear Selection"/> <input type="button" value="Refresh"/>				Selected	Title	Region	Country	<input checked="" type="checkbox"/>	Markham	North America	Canada	<input type="checkbox"/>	Ottawa	North America	Canada	<input type="checkbox"/>	Toronto	North America	Canada
Selected	Title	Region	Country																	
<input checked="" type="checkbox"/>	Markham	North America	Canada																	
<input type="checkbox"/>	Ottawa	North America	Canada																	
<input type="checkbox"/>	Toronto	North America	Canada																	

- **Region** – this Drop-Down is connected to the "Regions" list.
- **Country** – this Drop-down is connected to the "Countries" list, and is filtered by the selected Region.
- **City/State** – this Grid is connected to the "Cities" list, and is filtered by the selected Country.

As you can see, you can use the Cascading Lookup field to have multiple fields, where some are filtered by others. The fields can be configured as Drop-Down controls, pair of lists or as Grid controls – it doesn't matter, the Cascading behavior works regardless of the Cascading Lookup field's display mode.



Technical Support

You can obtain technical support using any of the following methods:

The KWizCom Web site

The KWizCom website: www.KWizCom.com contains updated valuable information, including:

- Answers to frequently asked questions (FAQ's) about our products – usability and technical questions.
- Product updates, which provide you with bug fixes and new features.

The Web Form

For technical support through the Internet, please fill in our [support web form on our web site](#)

For more information on technical support, please review our [support programs page](#).

Our goal is to provide nothing less than outstanding service.

KWizCom's service model is structured to provide immediate, reliable customer support. Even customers that are not IT experts can feel confident in deploying KwizCom solutions as KWizCom's global network of experts is always standing by, waiting to provide a rapid response for each customer query.