

KWizCom Corporation



Cascading LookApp

User Guide

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CONTENTS

Contents	3
introduction	4
General	4
Product Overview	5
Key Features	5
Installation	6
Software Requirements	6
Server Requirements	6
Client Requirements	6
Installation Procedure	6
Administration Guide	7
Configuring Cascading LookApp columns	7
Usage Examples	11

INTRODUCTION

GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product Overview
- Installation Guide
- Administration Guide

PRODUCT OVERVIEW

The KWizCom Cascading LookApp is a SharePoint Online add-in that enhances your existing Lookup columns with added capabilities:

- Cross-site lookups
- Filtered lookups by views
- Filter lookups by another column - Cascading fields (“Region > Country > City”)
- Filter lookups by additional columns in the lookup list
- Quickly add item to the lookup list

KEY FEATURES

Feature	KWizCom Cascading LookApp
Supports Cascading fields ("City" filtered by "Country")	√
Enables the filtering of the displayed items in the lookup field according to a view defined in the target list	√
Cross site lookup - enables the creation of lookup field for lists that are located on different sites.	√
Enables the conversion of lookup fields to KWizCom Cascading LookupApp fields	√
Filter lookup items by additional columns in the lookup list	√
Enables creating new item using the "create new item" link	√
Cross-Browser support (IE, Firefox, Safari and Google Chrome support)	√

INSTALLATION

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint 2013/2016 configured for app hosting
- SharePoint online (Office 365)

CLIENT REQUIREMENTS

- Windows 7+
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version).

INSTALLATION PROCEDURE

To download and install this app please follow these steps:

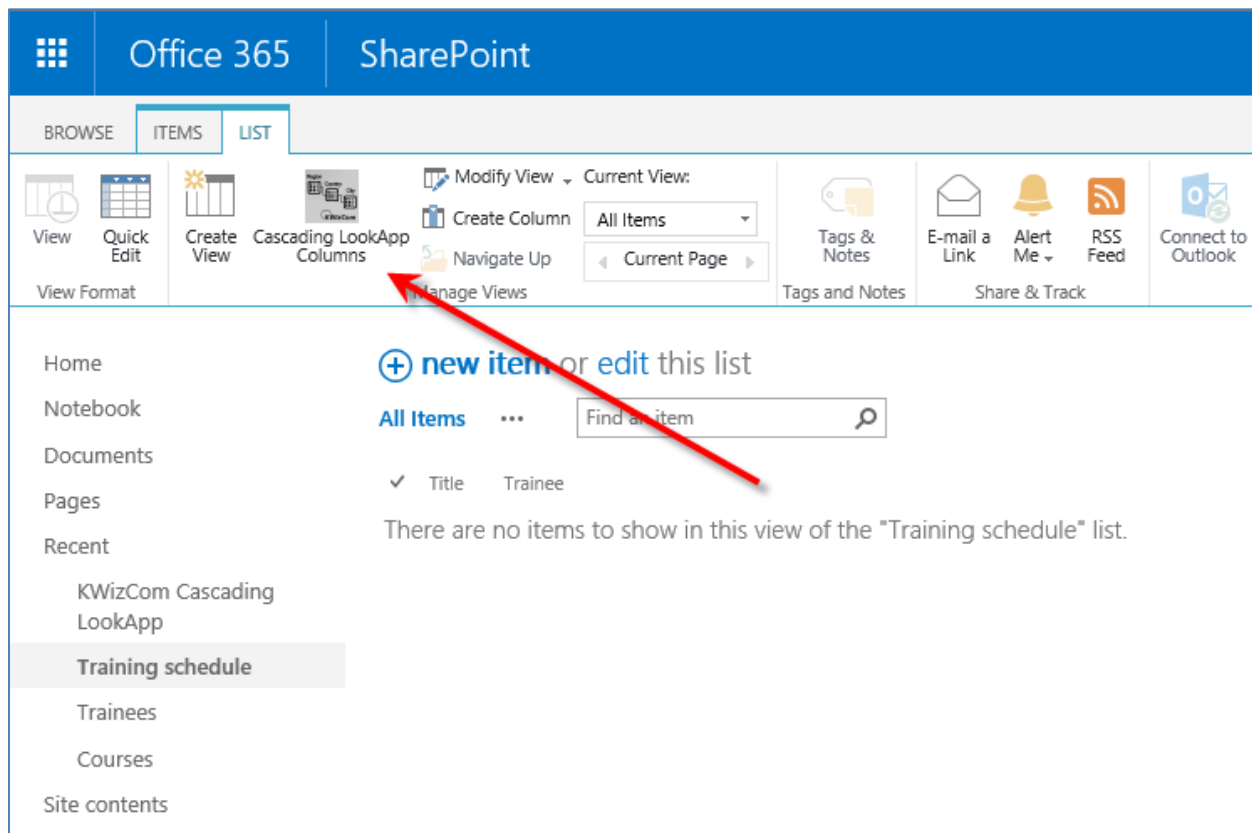
- Browse the product page on Microsoft's Office app store:
<https://store.office.com/en-us/appshome.aspx?productgroup=sharepoint&ui=en-US&rs=en-US&ad=US>

Search for “cascading”.
- Install the free version. This version includes a message that indicates that this is a free trial version.

ADMINISTRATION GUIDE

CONFIGURING CASCADING LOOKAPP COLUMNS

After you install the Cascading LookApp add-in and add it to your site, you will see its ribbon button in every list's "List" ribbon:



Clicking this ribbon button will open the list's Cascading LookApp settings page:

Add or Edit Cascading LookApp Columns ▾

Select a Column.

Actually, I want to create a new column ▾

Enter New Column Name

Select Lookup Information

Select a target site: /sites/qa/forms ▾

Select a target list: Bookings ▾

Select a target column: Title ▾

Select Filtering Settings

Filter options based on this view: No thanks, I want to see all choices. (default) ▾

Show filter for columns:
(Select lookup list column to filter by)

Filter by another column in this list:
(Cascaded master-detail relation)

No thanks, I want to see all choices. (default) ▾

Additional Field Settings

Allow multiple values

Add to all content types

Add to default view

Add new item text: add a new item...

Content type should use in new item form: I want to use the default content type ▾

SAVE CANCEL APPLY

This page enables you to create new Cascading Lookup columns or convert an existing Lookup column to Cascading Lookup column.

This settings page includes the following properties:

Select a Column.

Account ▾

Select Lookup Information

Select a target site: /sites/qa/forms ▾

Select a target list: Customers ▾

Select a target column: Company name ▾

Property	Description
Select a column	This drop-down property displays all the Lookup columns in the list, select the one you want to convert to a Cascading LookApp.

Select a target site	Unlike the out-of-the-box Lookup column, you can connect your Cascading LookApp column to remote lists that are in other sites in the current S.C. Select the site where the target list exists.
Select a target list	Select the target list to which you want to connect the Cascading LookApp column.
Select a target column	Choose the column you wish to get information from and display in the lookup field.

Select Filtering Settings

Filter options based on this view:

Show filter for columns:
(Select lookup list column to filter by)

Filter by another column in this list:
(Cascaded master-detail relation)

Property	Description
Filter options based on this view	Select a view from the target list that will be used to filter the displayed items in the Cascading LookApp column.
Show filter for columns (Select lookup list column to filter by)	Select additional columns from the target list. These column will be displayed to the end-user above the Cascading LookApp field as filters, so end-users will be able to filter items in the Cascading LookApp column in run-time. Please see usage examples in the next section.
Filter by another column in this list (Cascaded master-detail relation)	Select a column from the current list that you wish to be used to filter the Cascading LookApp column. This option enables you to implement Cascading fields, where one field filters the other, such as <i>Country</i> drop-down that filters a <i>City</i> drop-down. Please see usage examples in the next section.

Additional Field Settings

Allow multiple values

Add to all content types

Add to default view

Add new item text:

Content type should use in new item form:

Property	Description
Allow multiple values	Check this property to show a multiple value lookup field.
Add to all content types	Check this property to add a new Cascading LookApp column to all list's content type
Add to default view	Check this property to add a new Cascading LookApp column to the list's default view.
Add new item text	Fill out the link title you wish end-user to see below the Cascading LookApp field. Clicking this link will open the "New Item" form for the target list, enabling users to quickly add new items to the target list without leaving the current new/edit form.
Content type should use in new item form	Select a content type to be used when creating a new item in the target list (when clicking the "Add new item" link below the Cascading LookApp field)

USAGE EXAMPLES

To demonstrate the various Cascading LookApp features, we'll be using the following example:

In the "Sales Leads" list we have two Lookup fields: "Account" and "Account Contacts":

The screenshot shows a form titled "Sales Leads" with the following fields:

- Title:
- Account: (dropdown)
- Account contacts: A list of names (Alex Brady, Amelie Matthews, Andrew Marsden, Danelle J. Le, Ishai, Jackie Verdi, Josh Coates) with an "Add >" button and a "< Remove" button.
- Lead source *: (dropdown)
- Published on site: (dropdown)
- Lead type *: (dropdown)

The "Account" lookup column is connected to the *Customers* list, and the "Account Contacts" lookup column is connected to the *Contacts* list.

These two lists (*Customers* and *Contacts*) are connected, so in the *Contacts* list there's a lookup field connecting every contact to a customer:

Contacts

[+ new item](#) or [edit this list](#)

All Items ...

✓	Contact name	Email	Phone	Customer
	Danelle J. Le	... Danelle.Je@carphase.com		Carephase
	Jackie Verdi	... v_jackie@carphase.com		Carephase
	Nicholas Fisher	... fishern@Hextam.com		Hextam
	Josh Coates	... josh.coates@Lamtouch.org		Lamtouch
	Yasmin Rahman	... yamrah@Lamtouch.org		Lamtouch
	Millie Chamberlain	... milch@Lamtouch.org		Lamtouch
	Alex Brady	... alex.bradly@saola.com		Saola
	Andrew Marsden	... mars.andr@zimhold.com		Zimholding
	Amelie Matthews	... matthews-a@zoosolin.com		Zoosoloin

The *Customers* list includes the following columns:

Customers

[+ new item](#) or [edit this list](#)

All Items ...

✓	Company name	Org. Type	Act.Mgr
	Hextam	... ENT	Robin
	Zimholding	... MED	Suzanne
	Saola	... MED	Suzanne
	Carephase	... MED	Suzanne
	Lamtouch	... SML	Robin
	Zoosoloin	... SML	Robin

Example 1: Converting the “Account” Lookup to a Cascading LookApp

The following screenshot shows the settings for the “Account” column:

Settings (1) and (2) connect the “Account” Cascading LookApp column to the *Customers* list, and the lookup column is “Company name”.

Settings (3) adds 2 additional columns from the target list as run-time filters that will be displayed above the Cascading LookApp.

Here's how the field looks like in the New/Edit form after we save these settings:

The screenshot shows a form with a label "Account". To its right are two dropdown menus: "Act.Mgr..." and "Org. Type...". Below these is a larger dropdown menu. The search bar within this menu contains the letter "r". The dropdown list is open, showing the following options: "(None)", "Carephase", "Hextam", "Lamtouch", "Saola", "Zimholding", and "Zoosoloin". The "(None)" option is highlighted in blue.

The added features comparing to a regular Lookup field are:

- 1) You can now also type a value that will filter the displayed options in the lookup, here's an example when typing the letter "c":

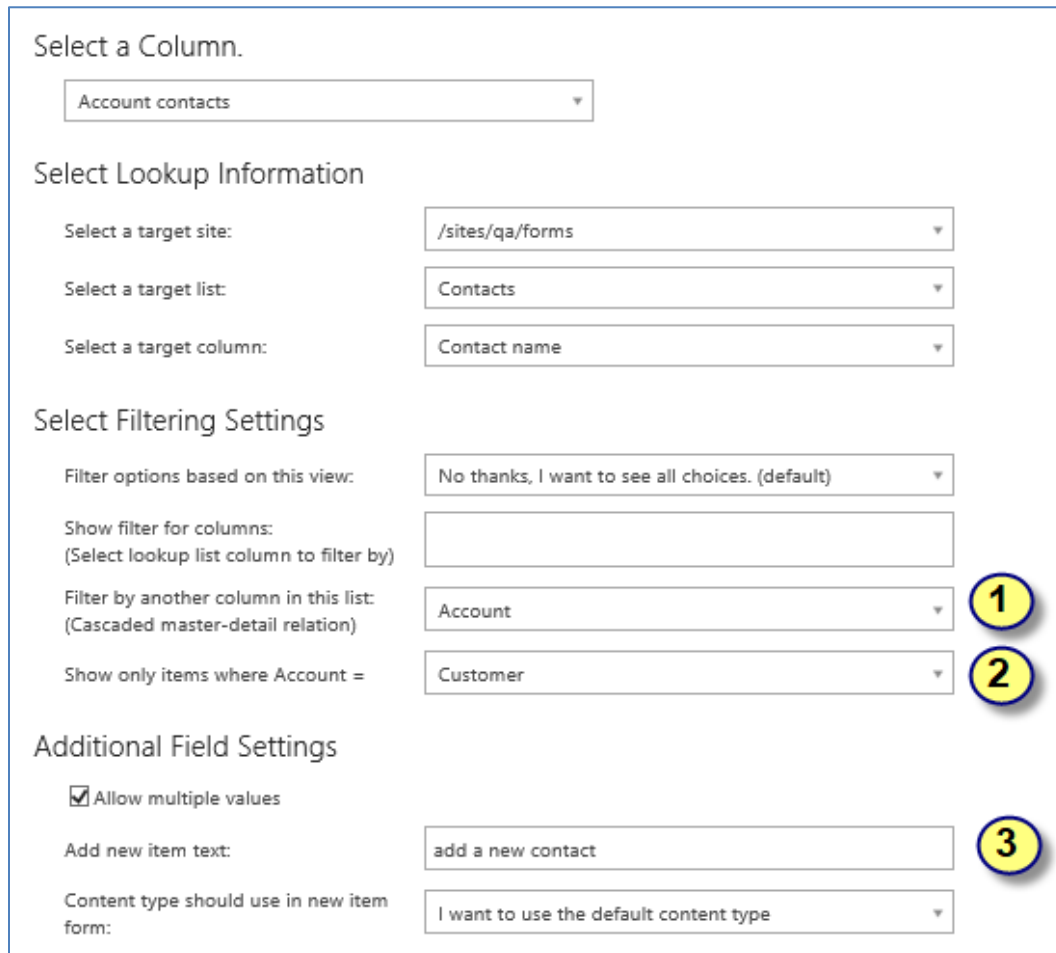
This screenshot shows the same form as above, but the search bar in the dropdown menu now contains the letter "c". The dropdown list is filtered to show only "Carephase" and "Lamtouch". "Carephase" is highlighted in blue.

- 2) You can filter the displayed items by the filters above the field, so for example if I choose the value "Robin" in the "Act. Mgr" field, I will see only accounts that match that value:

This screenshot shows the form with the "Act.Mgr..." dropdown menu set to "Robin". The search bar in the dropdown menu is empty. The dropdown list shows "(None)", "Hextam", "Lamtouch", and "Zoosoloin". The "(None)" option is highlighted in blue.

Example 2: Converting the “Account Contacts” Lookup to a Cascading LookApp

The following screenshot shows the settings for the “Account Contacts” column:



Select a Column.

Account contacts

Select Lookup Information

Select a target site: /sites/qa/forms

Select a target list: Contacts

Select a target column: Contact name

Select Filtering Settings

Filter options based on this view: No thanks, I want to see all choices. (default)

Show filter for columns:
(Select lookup list column to filter by)

Filter by another column in this list:
(Cascaded master-detail relation) Account **1**

Show only items where Account = Customer **2**

Additional Field Settings

Allow multiple values

Add new item text: add a new contact **3**

Content type should use in new item form: I want to use the default content type

Settings **1** and **2** configure cascading behavior: “Account” field will filter the “Account contacts” field: Setting **1** configures the “Account contacts” column to be filtered by the “Account” column.

Settings **2** defines how to accomplish that filtering: When user selects an account, this select value will be compared with the value of the “Customer” column in the *Contacts* list (which is the target list for this lookup), and only items that match that value will be displayed.

Setting **3** will display a “add a new contact” link below the “Account contacts” LookApp field that will enable users to quickly add new contacts directly from the current form.

Here’s how the “Account contacts” field looks like in the New/Edit form after we save these settings:

Account

Act.Mgr... ▼ Org. Type... ▼

Lamtouch ▼

Account contacts

Josh Coates
Millie Chamberlain
Yasmin Rahman

Add >

< Remove

[add a new contact](#)

So now, when selecting an account, only that account's contacts are displayed. In addition, the "add a new contact" appears below the field, enabling to add new contacts without directly from this form.