



## SharePoint Cascading Lookup Plus Field Type





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## Table of Contents

<b>Introduction .....</b>	<b>4</b>
<b>Overview.....</b>	<b>5</b>
<b>Key Features &amp; Benefits .....</b>	<b>8</b>
<b>Installation .....</b>	<b>9</b>
<b>Software prerequisites .....</b>	<b>9</b>
<b>Installation Procedure .....</b>	<b>10</b>
<b>Post Installation .....</b>	<b>11</b>
<b>Un-Installation Procedure .....</b>	<b>12</b>
<b>Component Localization .....</b>	<b>13</b>
<b>Component Activation .....</b>	<b>15</b>
<b>Administration Guide .....</b>	<b>20</b>
<b>Configuring the Cascading Lookup field .....</b>	<b>20</b>
<b>This column settings .....</b>	<b>22</b>
<b>Target column settings .....</b>	<b>29</b>
<b>Convert OOTB SharePoint Lookup to Cascading Lookup .....</b>	<b>30</b>
<b>FAQ.....</b>	<b>31</b>
<b>What advantage does this field offer in comparison with the SharePoint Lookup field? .....</b>	<b>31</b>
<b>Can I use only the filtering or cross site features of the Cascading Lookup Plus Field Type?.....</b>	<b>31</b>
<b>Which SharePoint versions are supported?.....</b>	<b>31</b>
<b>Do I have to install anything on my company's client-PCs?.....</b>	<b>31</b>

## 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 2007/2010/2013/2016/2016 Server and WSS/Foundation.

This Administration Guide is targeted towards SharePoint administrators and Site administrators/owners. It provides you with all the information you need to install, deploy and configure this KWizCom product:

- Product overview
- Installation guide
- Component activation
- Product localization
- Configuration & customization
- FAQ

## Overview

**Easily implement sophisticated, cross-site, relational-database solutions in SharePoint!**

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 fields:

- Cascading fields ("Region > Country > City")
- Cross-site lookups
- Filtered lookups
- Bi-directional lookup
- Many-to-Many entity relationships

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

**With SharePoint Cascading Lookup Plus Field you can:**

### **Create cascading fields**

Easily filter field values by other fields in the same List.

**Example:** Want to display "Region", "Country" and "City" fields, where each one filters the next field?

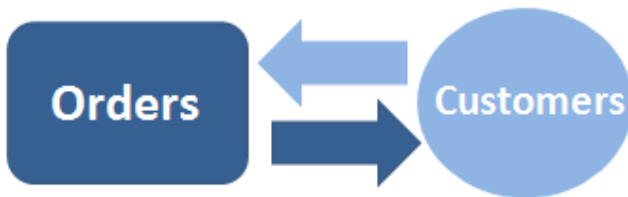
SharePoint Cascading Lookup Plus Field type enables you to do just that with the click of a button!

The screenshot shows the 'Customers - New Item' form in SharePoint. The form includes fields for Company Name, Contact, Phone number, Address, and Continent. Below these are three cascading lookup fields: Country, Region, and City. The Country field is set to 'Canada', the Region field to 'Ontario', and the City field to 'Toronto'. A red box highlights the Country, Region, and City fields. A blue callout box points to the Country field with the text: 'Region is filtered by the selected Country and City is filtered by the selected Region'. Yellow arrows indicate the filtering relationship between the fields. The form also includes a toolbar with 'Edit', 'Save', 'Cancel', 'Paste', 'Copy', 'Attach File', and 'Spelling' options.

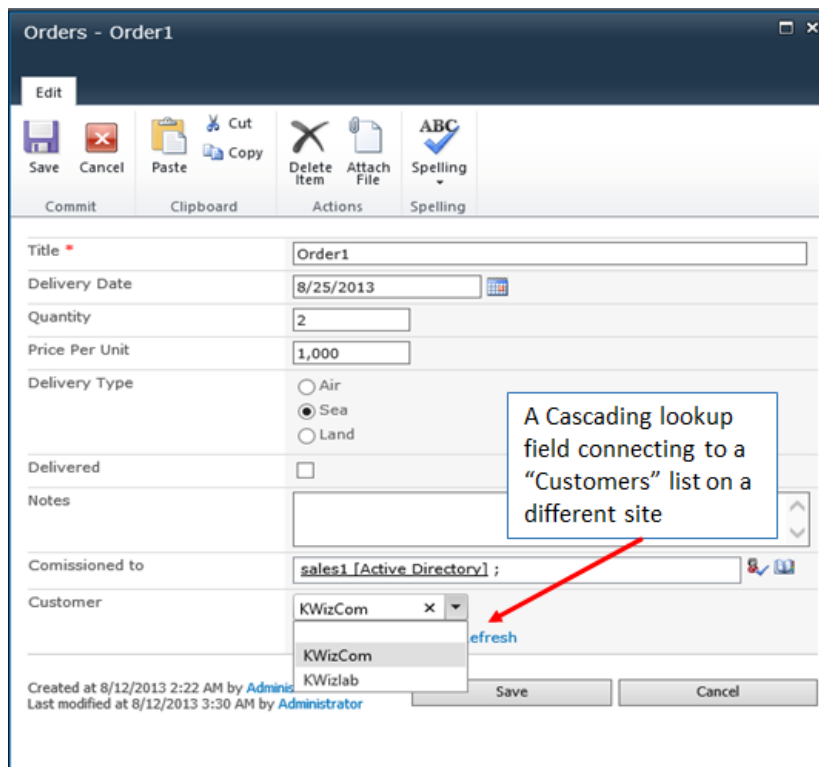
## Create a two-way connection between lists

By using this feature you finally can implement a **true relational model** in SharePoint (yes – just like in "normal" database applications!).

When you create a lookup field from one list to another, a reverse lookup is automatically created on the other list.



**For example:** when you create a lookup field in the "Orders" list that connects each order to a customer in the "Customers" list (see below), a reverse lookup will automatically be created in the customers list.



The screenshot shows the 'Orders - Order1' form in SharePoint. The form includes fields for Title (Order1), Delivery Date (8/25/2013), Quantity (2), Price Per Unit (1,000), Delivery Type (Sea), Delivered (checkbox), Notes, Comissioned to (sales1 [Active Directory]), and Customer (KWizCom). A red arrow points to the 'Customer' field, which is a cascading lookup field. A text box with a blue border and white background contains the text: "A Cascading lookup field connecting to a 'Customers' list on a different site". The 'Customer' field is currently set to 'KWizCom' and has a dropdown menu open showing 'KWizCom' and 'KWizlab'. A 'Refresh' button is visible next to the field. The form also includes 'Save' and 'Cancel' buttons at the bottom.

So....

### How does this help?

Now you can easily manage all customers' orders directly from the customer's "view item" page as demonstrated in the following screenshot:

The screenshot shows a web application window titled "Customers - KWizCom". It features a "View" tab and several action buttons: "Edit Item", "Version History", and "Alert Me". A blue callout box states: "In customers 'View' mode you can all connected items, such as the customers orders". Below this is a form for customer details: Company Name (KWizCom), Contact (Nimrod Geva), Phone number (+1-905-370-0333), Address (95 Mural Street, Suite 600, Richmond Hill), Continent (North America), and Country (Canada). The Region and City sections are also visible, with a blue callout box stating: "You define which columns to display for the connected orders". At the bottom, an "Orders" table is displayed with columns: Title, Delivery Date, Quantity, Price Per Unit, and Delivered. A blue callout box points to the "Order1" row with the text: "Click to open a connected order".

Title	Delivery Date	Quantity	Price Per Unit	Delivered
Order1	8/25/2013	2	\$1,000.00	No
Order2	8/25/2013	1	\$750.00	Yes
Order3	9/1/2013	3	\$650.00	No

You can manage a connection between any two entities from either side of the relationship, **just like in any regular relational application!**

## Key Features & Benefits

Feature	KWizCom Lookup Plus field
Supports Cascading fields ("City" filtered by "Country")	✓
Supports multiple master fields ( field that is filtered by the combination of several master fields - for use with many to many connection lists)	✓
Automatically creates a bi-directional connection between items	✓
Enables the filtering of the displayed items in the lookup field according to a view defined in the target list	✓
Lazy-load to support very large lists	✓
Cross site lookup - enables the creation of lookup field for lists that are located on different sites.	✓
Creates a "CRM-like" interface-on every item's "View Properties" page, you can display all the connected items in a grid display.	✓
Enables the conversion of lookup fields to KWizCom Cascading Lookup Plus fields	✓
View more than one field from the lookup list	✓
Enables paging, filtering and sorting	✓
Enables changing a field from single to multiple value	✓
Enables creating new item using the "create new item" link	✓
Enables calculated column reference for this type of column	✓
Compliant with the accessibility standard (WCAG)	✓
Cross-Browser support (IE, Firefox, Safari and Google Chrome support)	✓
Multi-lingual (standard for all KWizCom components)	✓



## **Installation**

### **Software prerequisites**

#### **Server Requirements**

1. SharePoint 2007 / WSS 3.0 or
2. SharePoint Server 2010/2013/2016/2016

#### **Client PC Requirements**

1. Windows 7+
2. Microsoft Internet Explorer 9+ / Mozilla Firefox (Latest version) / Google Chrome (Latest version), Safari (Latest version)

## Installation Procedure

### SharePoint 2007

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Unzip the KWizCom SharePoint Cascading Lookup Plus Field installation zipped file on your server.
3. Double-click the .msi file in order to begin the installation.
  - When the installation process is complete it will recycle all application pools automatically.
4. **That's it!** Your Cascading Lookup Plus Field Type is installed!

### SharePoint 2010/2013/2016

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.

This will start the KWizCom web installer

**Note:** The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the "Download only" option (3rd page in the installer's wizard), OR download the product WSP packages by clicking their links under the "Download Installable Packages" section. After you manually download and unzip the product's WSP packages or use the web installer to download the product's packages, install the KWizCom product by simply running the "SP-WSPInstaller" powershell script.

## **Post Installation**

### **SharePoint 2007**

1. After completion of the installation, you will see a new KWizCom entry in Windows Start -> All Programs -> KWizCom containing the following programs:

#### **About SharePoint Cascading Lookup field type**

Display General Information about the component.

#### **Activate SharePoint Cascading Lookup field type**

This utility enables you (the SharePoint Administrator) to activate the downloaded evaluation version.

2. A new Cascading Lookup field type is available when you add a new list column.

### **SharePoint 2010/2013/2016**

A new Cascading Lookup field type is available when you add a new list column.

## **Un-Installation Procedure**

### **SharePoint 2007**

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Go to Control Panel and double-click Add or Remove Programs.
3. Select product entry and click Remove button.
4. Click Yes to approve the removal of the component.
5. Once the product was un-installed, close the Add or Remove Programs screen.

### **SharePoint 2010/2013/2016**

Retract the solution using SharePoint central admin or by using stsadm/powershell command line.

## Component Localization

All KWizCom components use .NET localization mechanism. This means that a KWizCom component will automatically use a language resource file according to the displayed application's language (this is true for all types of components).

This section describes how to translate this product to your preferred language.

### SharePoint 2007

1. On your Windows task bar, select:

**Start->All Programs->KWizCom->SharePoint Cascading Lookup Plus Field**

**Type->**  **SharePoint Cascading Lookup Plus Resource Editor**

2. Select your target language on the "Select Culture" drop-down list.
3. To import an existing resource file - Click "Load" and upload the translations resource file.
4. For translation to any other language-Translate all the displayed strings in the strings grid by entering a translated value in the "Localized Value" column.
5. Click the "Create"/"Update" button in order to create/save a resource file for the selected target language.
6. If you want to create additional resource files for more target languages, simply repeat stages 2-5 for each language.
7. Close the utility by clicking the "Close" button.

### SharePoint 2010/2013/2016

1. Go to: C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\[14/15]\Resources.
2. Copy the product's resource file:  
`KWizCom.SharePoint.FieldControls.DualLookupType.resx`  
to a new resource file, and add to its name the requested language's suffix.  
Example: to create a French resource file, copy the file to the following file name:  
`KWizCom.SharePoint.FieldControls.DualLookupType.fr-FR.resx`

3. Update the copied resource file and replace the English strings with the translated strings. The translatable strings are located inside the `<data name>` nodes, in their `<value>` attributes.

Example:

```
<data name="btnAccept" xml:space="preserve">  
<value>Accept Changes</value>  
</data>
```

4. Save the new resource file.

**REMARK:**

You can also use the [KWizCom Resource Translator](#) Free utility to quickly translate any KWizCom add-on to your preferred language.

## Component Activation

### SharePoint 2007

KWizCom components are available for evaluation prior to purchase. This way you can try our components and verify that they indeed meet your needs.

Evaluation versions of KWizCom components contain all the features of the component's production version. The only difference between the two versions is that the evaluation version is time-limited to operate for a period of one month.


Once you decide to order a KWizCom component, you will need to complete the following steps:

1. Order the component on the KWizCom website – [www.KWizCom.com](http://www.KWizCom.com).
2. Send us the installed evaluation version's *product Code* (you will see the product Code on the "About" product page:



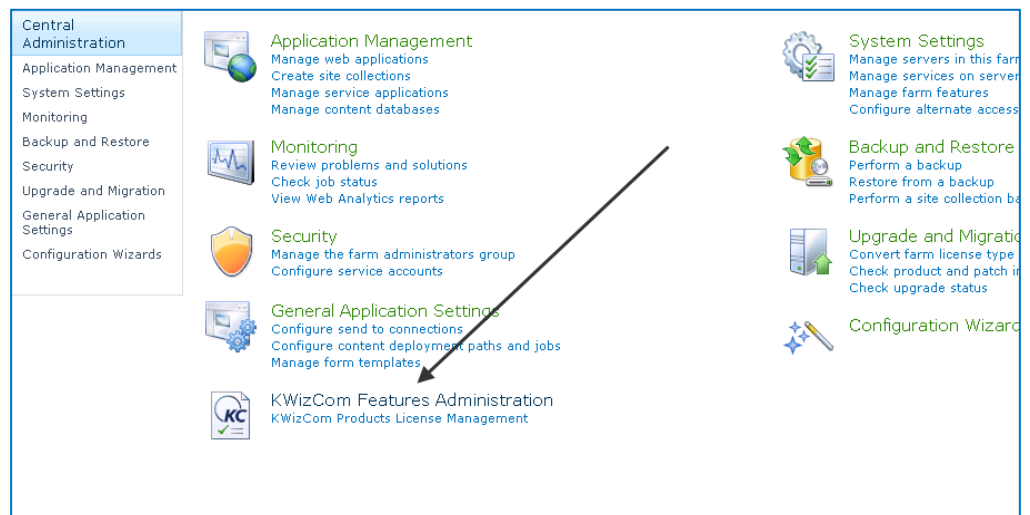
Please use the [Activation Request web form](#), on KWizCom web site to send us your product code!

3. Get the component activation key – this key will be sent to you by email once your order is processed.

4. Activate your installed evaluation version -  
click **Start ->All Programs ->KWizCom ->SharePoint Cascading Lookup Plus Field Type ->**  **Activate SharePoint Cascading Lookup Plus Field Type**

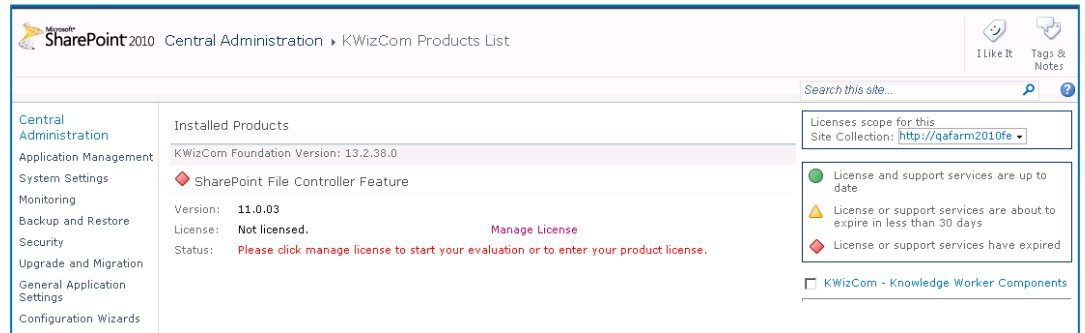
## SharePoint 2010/2013/2016

1. Order the product on the KWizCom website – [www.KWizCom.com](http://www.KWizCom.com), or contact our sales team at [sales@kwizcom.com](mailto:sales@kwizcom.com).
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
  - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:

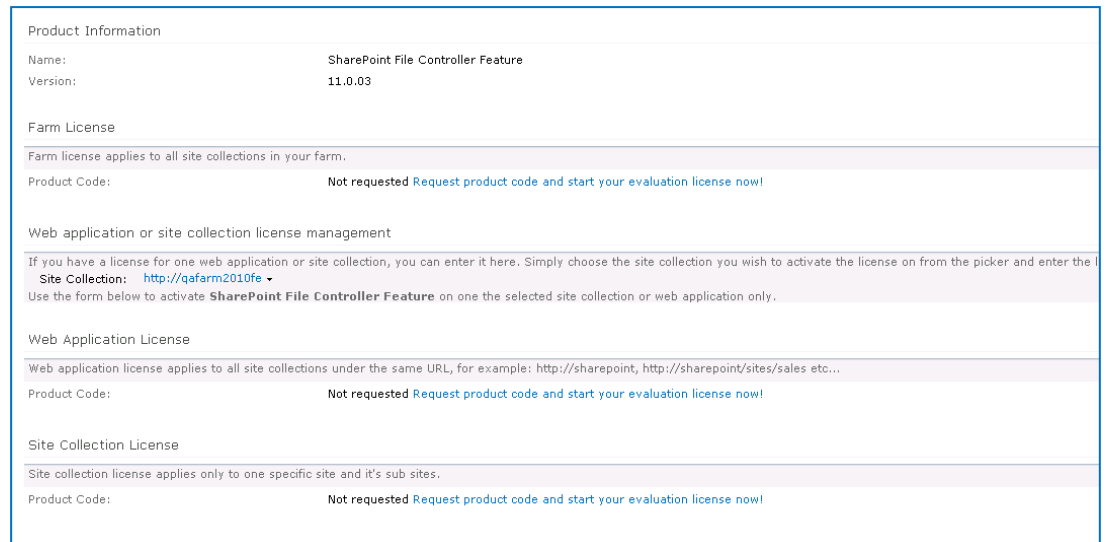


- b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products' licenses:

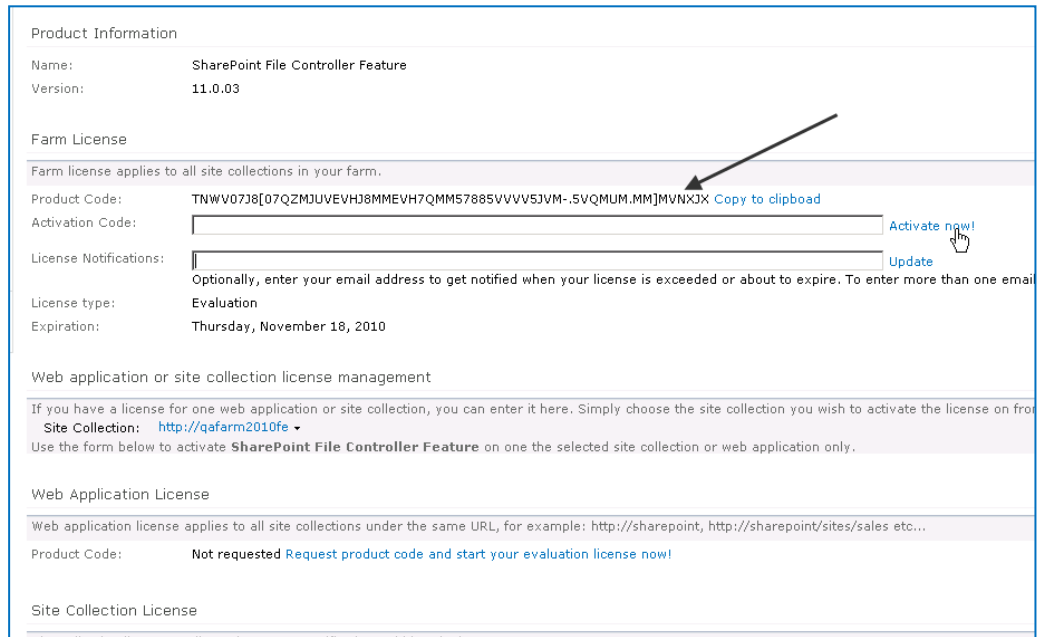




- c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



- d. Click on the “Request product code and start your evaluation now” link.  
A product code will be generated and displayed as in the following screenshot:



**Product Information**

Name: SharePoint File Controller Feature  
Version: 11.0.03

**Farm License**

Farm license applies to all site collections in your farm.

Product Code: TNWV07J8[07QZMJUVEVHJ8MMEVH7QMM57885VVV53VM-.5VQMUM.MM]MVNXJX [Copy to clipboard](#)

Activation Code:  [Activate now!](#)

License Notifications:  [Update](#)

Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one email address, separate each address with a comma.

License type: Evaluation  
Expiration: Thursday, November 18, 2010

**Web application or site collection license management**

If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license on from the list below.

Site Collection: <http://qafarm2010fe> ▼

Use the form below to activate **SharePoint File Controller Feature** on one of the selected site collection or web application only.

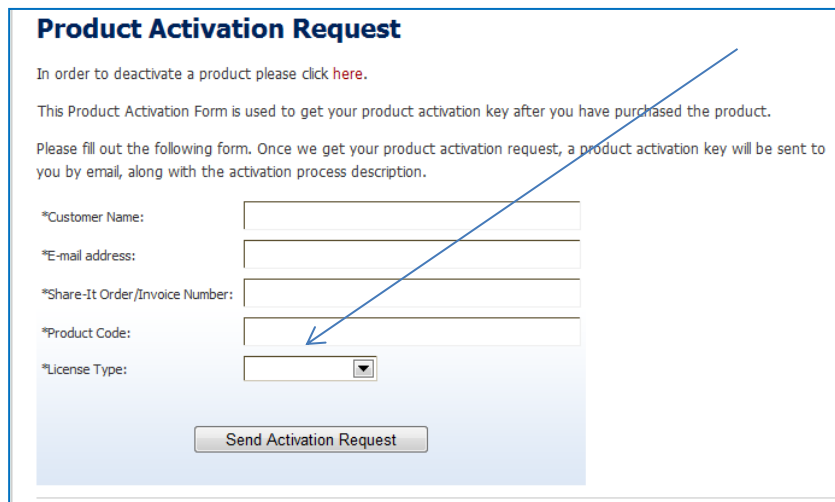
**Web Application License**

Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...

Product Code: **Not requested** [Request product code and start your evaluation license now!](#)

**Site Collection License**

- e. Copy the product code.
- f. Browse the *Product Activation Request* page on KWizCom’s web site: <http://www.kwizcom.com/ProductReg>.



**Product Activation Request**

In order to deactivate a product please [click here](#).

This Product Activation Form is used to get your product activation key after you have purchased the product.

Please fill out the following form. Once we get your product activation request, a product activation key will be sent to you by email, along with the activation process description.

\*Customer Name:

\*E-mail address:

\*Share-It Order/Invoice Number:

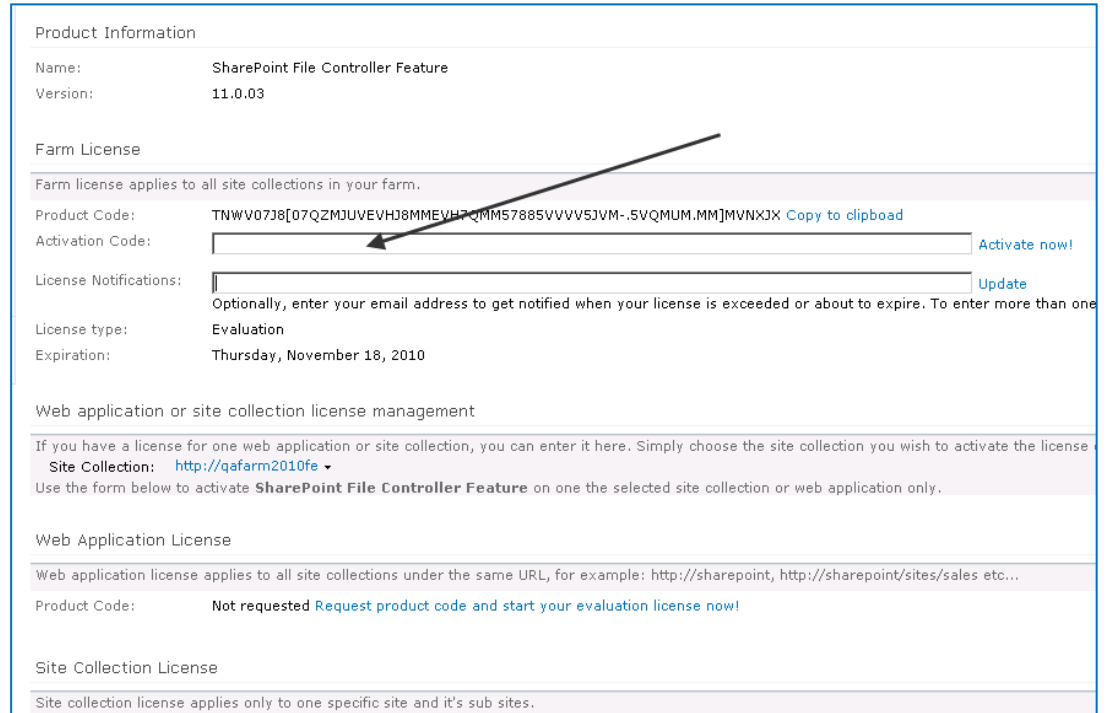
\*Product Code:

\*License Type:

Copy your *Product Code* into the “Product Code” field, and after you fill-out all other form fields, click “Send Activation Request” button.

- g. Once your order is confirmed, you will receive the Activation Code for your product by email.

- h. Copy the activation code into the "Activation Code" field in the product's license management page and click "Activate now!" link.



Product Information

Name: SharePoint File Controller Feature  
Version: 11.0.03

Farm License

Farm license applies to all site collections in your farm.

Product Code: TNWV07J8[07QZMJUVEVHJ8MMEVH7QMM57885VVVV5JVM-.5VQMUM.MM]MVNXJX [Copy to clipboard](#)

Activation Code:  [Activate now!](#)

License Notifications:  [Update](#)  
Optionally, enter your email address to get notified when your license is exceeded or about to expire. To enter more than one

License type: Evaluation  
Expiration: Thursday, November 18, 2010

Web application or site collection license management

If you have a license for one web application or site collection, you can enter it here. Simply choose the site collection you wish to activate the license

Site Collection: <http://qafarm2010fe> ▾  
Use the form below to activate **SharePoint File Controller Feature** on one the selected site collection or web application only.

Web Application License

Web application license applies to all site collections under the same URL, for example: http://sharepoint, http://sharepoint/sites/sales etc...

Product Code: **Not requested** [Request product code and start your evaluation license now!](#)

Site Collection License

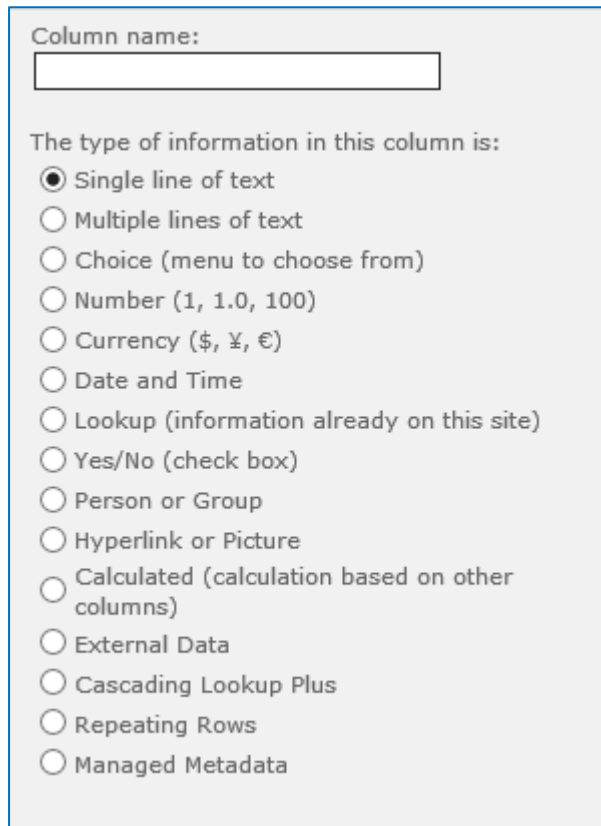
Site collection license applies only to one specific site and it's sub sites.

That's it! Your product is now fully activated.

## Administration Guide

### Configuring the Cascading Lookup field

After you install the product on the SharePoint server a new "Cascading Lookup Plus" field type will be available in the "Add Column" list page:



Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Cascading Lookup Plus
- Repeating Rows
- Managed Metadata

Once you create a Cascading Lookup Plus column, you basically have to configure the following:

- **The lookup list to which this field should connect**  
This can be a list/library located in same site or in another site.
  
- **Functionality and look**  
Configure various properties that affect the way the lookup field is displayed and functionality that it provides.
  
- **Master field that this field should be filtered by** (Optional)  
This enables you to establish cascading behavior (such as "City" drop-down

field which is filtered by a "Country" field in the same list).

The Cascading Lookup Plus can be filtered by fields of the following types:

- Cascading Lookup Plus
- Lookup field
- Choice field (not including the multi-choice option)

**REMARK:**

When using the Cascading Lookup Plus field in a custom form (a list form that was customized with SharePoint Designer), the Cascading Lookup Plus field can only be filtered by a Cascading Lookup Plus field.

- **The reverse lookup field that will be created in the lookup list**

(Optional)

You can define a bi-directional connection between the current list and the lookup list.

For example: when you create a cascading lookup plus field in "Orders" list and connect this field to a "Customers" list, you can also create a reverse lookup in the "Customers" list, connecting it back to the "Orders" list.

The dual-lookups enable users to see in each Customer View/Edit form all the connected orders for the customer.

The following section describes the various fields' properties that enable you to configure these settings.

## This column settings

The following 3 screenshot show the Cascading column's configurable properties:

**Lookup source field settings**  
Define the source of this cascading lookup field

Get information from site:

in this site collection  
 in the current site  
 in the following site (in the current site collection)

[site collection]

Get information from list:

In this column:

Filter out identical values

Filter items by this view:

Use this view to also filter the selected connected items in the item's "View Properties" page  
 Use selected view for sorting

---

**Additional columns in list view pages**  
Select additional columns from the lookup list to be displayed as additional columns in the list view pages.

Display these additional fields as columns in list view page:

Available Columns		Selected Columns
Created	<input type="button" value="&gt;"/>	<input type="text"/>
ID		
Modified	<input type="button" value="&lt;"/>	
Title		

---

**Displayed columns in item's View/Edit forms**  
Select additional columns from the lookup list to be displayed in a grid (table) in an item's Edit/View forms

Display these additional fields in list item's View/Edit forms:

Available Columns		Selected Columns
App Created By	<input type="button" value="&gt;"/>	Title
App Modified By		
Content Type	<input type="button" value="&lt;"/>	
Country		

**Look & Feel**  
Configure the Lookup field's style and additional features

Display this column in edit mode using:  
Grid (recommended for large lists) ▼

Allow multiple values  
 Edit by request  
Check this property to make the field read-only be default in the New/Edit forms. User will be able to edit its content by clicking an "Edit" link

New/Edit mode skin:  
- Default skin - ▼

View mode skin:  
- Default skin - ▼

**List View Options**  
 Show link to lookup item/s in list views  
 Enable use in calculated fields  
Check this if you wish to use this field's value in calculated field. It will create a readonly field named C\_[current field] that you will be able to use in calculated field. Note: Existing items will not be updated until their next edit.

**New/Edit Item Form Options**  
 Hide the "Create new item" link from the lookup field  
 Hide the "Refresh link"

**View Item Form Options**  
 Open links in new window

**Grid options**  
The following options apply when the field is in Grid mode (New/Edit form) and in View Item page.  
 Hide the Grid header  
 Allow filtering  
 Display lookup column multiple-values in separate rows  
 Hide the link to the lookup item  
 Allow editing the lookup item  
 Allow deleting the lookup item  
 Allow paging  
Page size:

**Relationship Behavior**  
Configure how deleting a record affects related lists. Restrict will prevent the deletion of records in related lists. Cascade will delete ALL related records.  
 Enforce relationship behavior  
 Restrict Delete  
 Cascade Delete

**Cascading fields**  
Configure "master-detail" behavior, enabling this field to be filtered by other field/s in this list (such as Region > Country > City cascading behavior).

Enable master details

Master column in current list:  
 ▼

Filter by column in Lookup list:  
 ▼

Enable second master details

Master column in current list:  
 ▼

Filter by column in Lookup list:  
 ▼

Show empty field when master field/s is/are empty

**Lookup source field settings**  
Define the source of this cascading lookup field  
 Create a reverse lookup field in the target list

Property	Function
<b>Lookup source field settings</b>	
Get information from site	<p>Define where the Lookup list is located:</p> <ul style="list-style-type: none"> <li>• Site collection level</li> <li>• This site</li> <li>• Other site in the same site collection</li> </ul> <p>You can also use dynamic tokens instead of using hard-coded url's. This is mostly needed when you wish to save this field as part of a list template that can be later enrolled in different site collections or even servers.</p> <p>The supported dynamic tokens are: [current site] [site collection] [server]</p>
Get information from list	Select the list (like in a regular SharePoint Lookup field) to which you wish to connect this lookup field.
In this column	Choose the column you wish to get information from and display in the lookup field.
Filter out identical values	Check this property to filter out lookup rows that have the same value in the "In this column" property's selected column.
Filter item by this view	<p>Select the view from the Lookup list that you wish to use for filtering the displayed items in the lookup field.</p> <p>This feature enables you to provide filtered lookups.</p> <p><u>Example</u>: When a salesman adds a new Order to the <i>Orders</i> list, the "Customer" lookup field may show him a drop-down listing only his customers (rather than all customers in the lookup "Customers" list)</p>
Use this view to filter the displayed connected items in the item's "view properties" page	If you check this checkbox, the defined view above will be used in the item's View page to filter lookup values from the lookup list.
Use selected view for sorting	Check this property if you want the displayed items in this lookup field to be sorted by the filtering view.
<b>Additional columns in list view pages</b>	
Select additional columns from the lookup list to be displayed as additional columns in the list view pages.	



Property	Function
Available columns	This list displays all columns from the lookup list that can be added to this list's list view pages as columns. Supported column types are Number, Date and Text
Selected Columns	This list displays the columns that you selected to be available as columns in this list. To actually see them on a specific list view, you'll have to edit the view and manually add the requested columns.
<b>Additional columns in item's View/Edit forms</b> Select additional columns from the lookup list to be displayed in a grid (table) in an item's Edit/View forms	
Available columns	This list displays all columns from the lookup list that can be added to this list's New/Edit/View forms.
Selected Columns	This list displays the columns that you selected to be displayed as part of the field in the New/Edit/View forms.
<b>Look &amp;Feel</b> Configure the Lookup field's style and additional features	
Display This column in Edit mode using:	Choose the way to display data in the field in the New/Edit forms: <ul style="list-style-type: none"> <li>• <b>Dropdown</b>- display a single column of data in a dropdown list (similar to OOTB SharePoint Lookup) This option is good when you need a single-select lookup.</li> <li>• <b>Grid</b>- display multiple columns of data in a grid (table), and also this type of control enables multi-selection of items.</li> <li>• <b>Left &lt;-&gt;Right list boxes</b> – display 2 lists enabling multi-selection by moving items from the left to the right list (same as the OOTB SharePoint lookup).</li> </ul>
Allow multiple values	This property appears only when the Grid display type is selected. Checking this field will enable end-users select multiple values from a Grid control in New/Edit form (instead of single selection dropdown).
Edit by request	This property is relevant only to Grid display mode.  By default, when you go to the Edit form, the cascading lookup will also appear in edit mode, allowing you to select item/s.

Property	Function
	Check this property to change that default behavior, and have the lookup field still appear in read-only mode (although you are in Edit form). It will go to edit mode only when a user clicks the "Edit Selection" link (located below the field).
Enable load on demand	This property appears only when the Dropdown display type is selected. Checking this property will make the Cascading Lookup field load the values from the connected list only when the end-users types a search string. Check this property when you connect the Cascading Lookup column to a very large list, this will improve the page load time.
New/Edit mode skin	This property is visible only if Dropdown or Grid options were selected in the property above, controls the displayed heme in New/Edit forms.  The "Classic" skin displays the default drop-down with white background.  <b>REMARK:</b> For Right-to-left languages (RTL), the "RTL" skin will display the classic drop-down.
View mode skin	This property is visible only if Dropdown or Grid options were selected in the property above, controls the displayed heme in View Item page.  The "Classic" skin displays the default drop-down with white background.  <b>REMARK:</b> For Right-to-left languages (RTL), the "RTL" skin will display the classic drop-down.
<b>List view options</b> Configuration options which appear in list views	
Show link to lookup item/s in list views	Check this property to make the Cascading Lookup column appear as a link in list views.
Enable use in calculated fields	Check this property to make the lookup field available to be included in calculated field's formula.

Property	Function
<b>New/Edit Item Form Options</b>	
Configuration options which appear in the View Item page	
Hide the 'Create New Item' link from the lookup field	Check this property to hide the 'Create New Item' link (located below the lookup field) from end-users.
Hide the "Refresh" link	Check this property to hide the Refresh' link (located below the lookup field) from end-users.
<b>View Item Form Options</b>	
Configuration options which appear in the New/Edit forms	
Open links in new window	Check this property to make the "View item" icon in the cascading lookup (appearing in View Item page) open the lookup item in a new winow/tab.
<b>Grid Options</b>	
The following options apply when the field is in Grid mode (New/Edit form) and in View Item page.	
Hide the Grid header	When the lookup field is rendered as a grid (table), you can show or hide that grid's header row (that displays column names). Check this property to hide the grid's header row.
Allow filtering	This property is relevant only to Grid display mode.  Check this property to display filtering controls at the tope part of the grid, enabling end0users to filter the field's items. This is mostly needed when your lookup field displays many items.
Display lookup column multiple-values in separated rows	This property is relevant only to Grid display mode.  Check this property to display multiple-value fields in grid display separated by rows instead of the default- separated by semicolons
Hide the link to the lookup item (Grid display only)	This property is relevant only to Grid display mode.  When this property is checked it hides the link to the item in the grid.
Allow editing the lookup item	Check this property to display an "edit" icon in the grid display.

Property	Function
Allow deleting the lookup item	Check this property to display a "delete" icon in the grid display.
Allow paging, Page size	This property is relevant only to Grid display mode.  Define paging functionality for the displayed lookup items.
<b>Relationship Behavior</b>	
Configure how deleting a record affects related lists. Restrict will prevent the deletion of records in related lists. Cascade will delete ALL related records.	
Enforce relationship behavior	Similar to the out-of-the-box SharePoint lookup check this property to either restrict deletion of looked up items or by choosing the cascade delete option, to delete looked up items when the main item is deleted. (This property is available only for single value lookup fields)
<b>Cascading fields</b>	
Configure "master-detail" behavior, enabling this field to be filtered by other field/s in this list (such as Region > Country > City cascading behavior).	
Enable master details*	Check this property if you wish this field to be filtered by another field on the same list (such as "City" field that you want to be filtered by a "Country" field in this list)
Master column in current list	Choose the filtering field (the "country" field in this example).
Filter by column in lookup list	Choose the field in the lookup list (remember? This column connects to a lookup list) that should be compared to the master field in order to filter the displayed values. In our Country-City example, the "City" lookup field connects to a "Cities" list that should have a "Country" field which will be compared to a master "Country" field.
Show empty fields when master field/s is/are empty	Check to show an empty row when there are no lookup values.

\* You can have multiple master-fields filtering your lookup field. After you have configured the 1<sup>st</sup> master field, check the "Enable second master details" to configure another field that will be used to filter your lookup field.

## Target column settings

This section in the Cascading Lookup field's settings is optional. Check the "Create a reverse lookup field in the target list" if you wish that a reverse lookup field will be created in the lookup list (also called "Target list"), back to the current list.

This will create a bi-directional lookup field that enables you to view and navigate to connected items from both lists.

Going back to the **Customer > Orders** example:

If you create a "Customer" Cascading lookup field in the Orders list, then you'll be able to connect each order to a customer. Wouldn't be nice if you could then see in the customer's View form, all his orders? And not just their titles, but all the relevant columns (order date, amount\$ etc.)

That is exactly the purpose of the reverse lookup capability – to enable bi-directional connection between 2 entities.

Check the "Create a reverse lookup field in the target list".

This will enable you to establish the same definitions for the remote lookup field as you defined for the current lookup field.

### That's it!

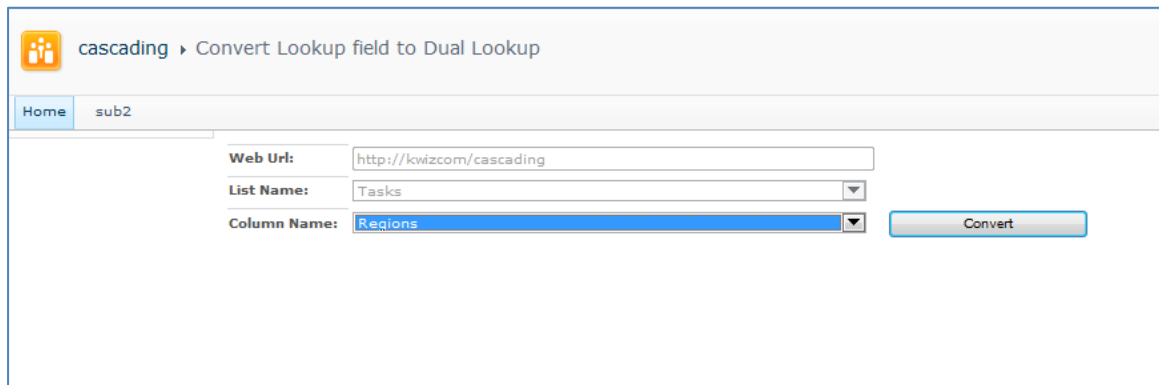
These settings enable you to create all sorts of relationships between entities (lists), located in same/different sites:

- 1 to many – such as Customer to Invoices
- 1 to 1 – such as **Partner to Contract** (assuming you have a single contract with every partner)
- Many to many – such as Class to Student

## Convert OOTB SharePoint Lookup to Cascading Lookup

You can convert out-of-the-box SharePoint lookup field to KWizCom's Cascading Lookup field.

In the List Settings page, click the "Convert Lookup to Cascading Lookup Plus" link, to get to the following page:



The screenshot shows a web interface for converting a SharePoint lookup field. At the top, there is a breadcrumb trail: "Home" and "sub2". Below this, there are three input fields: "Web Url" with the value "http://kwizcom/cascading", "List Name" with a dropdown menu showing "Tasks", and "Column Name" with a dropdown menu showing "Regions". To the right of these fields is a "Convert" button.

In "Column Name" select the Lookup field that you wish to convert, and then click "Convert".

The field will be converted to Cascading Lookup and you will be redirected to the field's settings page for further configurations.

## FAQ

### **What advantage does this field offer in comparison with the SharePoint Lookup field?**

**KWizCom SharePoint Cascading Lookup Plus Field** is a new SharePoint field type that expands the SharePoint capability of connecting between various entities (list items) by adding the capability of automatically creating a two-way connection, allowing filtered lookup and cross site lookup.

### **Can I use only the filtering or cross site features of the Cascading Lookup Plus Field Type?**

Yes. You can choose which features you wish to use with the KWizCom SharePoint Cascading Lookup Plus Field Type, simply by clearing the check box for every feature you don't want to use.

### **Which SharePoint versions are supported?**

KWizCom SharePoint Cascading Lookup Plus Field Type supports both MOSS 2007/WSS 3.0 and SharePoint 2010/2013/2016 server/foundation.

### **Do I have to install anything on my company's client-PCs?**

No. KWizCom SharePoint Cascading Lookup Plus Field Type is a server installation.