ArtfulBits Cascaded Lookup Column

for Microsoft® SharePoint®
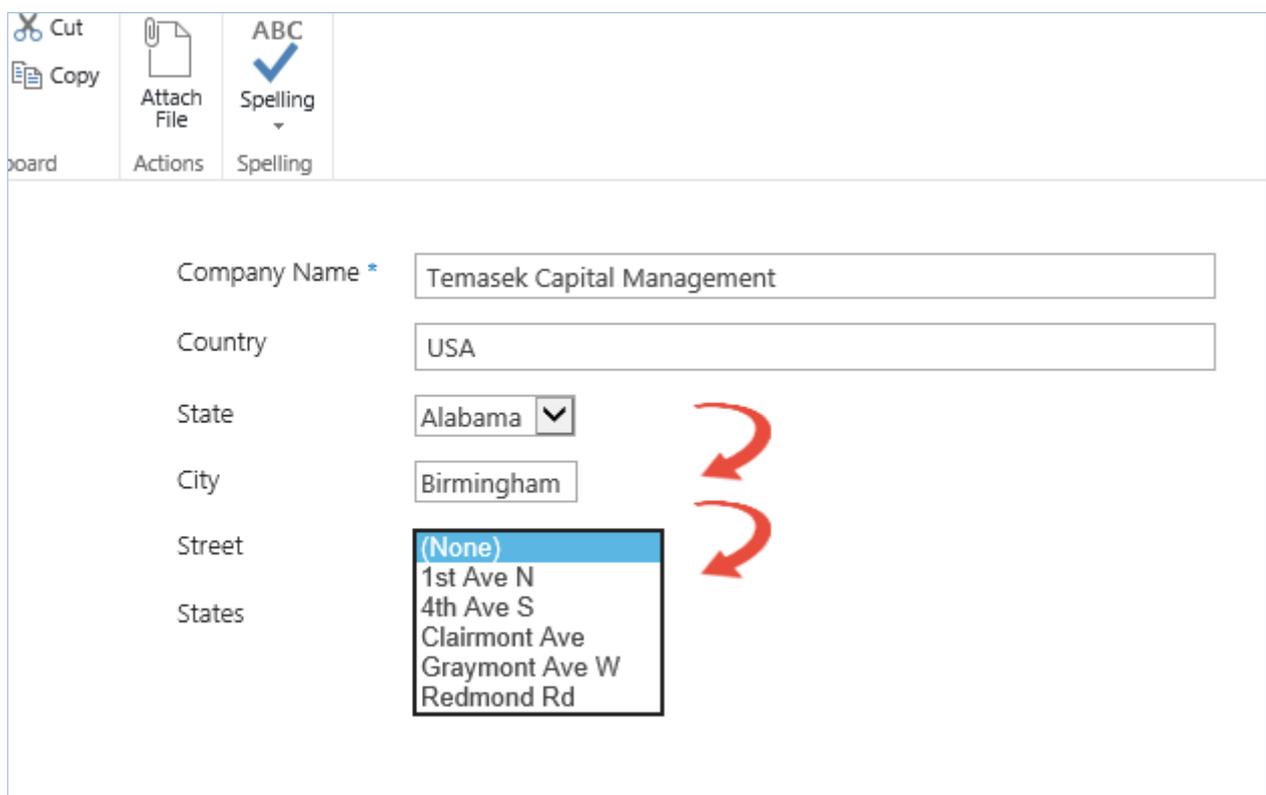
User Guide

Overview

Cascaded Lookup Column is intended to enhance standard SharePoint lookup functionality. Component allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.

	First Name *	Maria
	Last Name	Burke
	Country	Canada ▾
		⊡ Add new item
	State	Colorado ▾
	City	Dallas / Independence → Add > / < Remove → Austin
	Street	Cedar St. / N Lamar Blvd / W Guadalupe St → Add > / < Remove → 4th Ave As
		⊡ Add new item

Feature List

Feature	SharePoint 2010	SharePoint 2013	SharePoint 2016	SharePoint 2019
Build parent-child relationships	✔	✔	✔	✔
Ajax support enabled	✔	✔	✔	✔
Unlimited number of cascading levels	✔	✔	✔	✔
Supported single-single, single-multi, multi-single and multi-multi relations	✔	✔	✔	
Supported lookup data from SharePoint lists in all sites within site collection	✔	✔	✔	✔
Supported lookup data from subfolders	✔	✔	✔	✔
Filtering retrieved data using existing list views	✔	✔	✔	✔
Supported default values	✔	✔	✔	✔
Ability to add and edit lookup items on the fly	✔	✔	✔	✔
Supported Datasheet view	✔	✔	✔	✔
Conversion among "ArtfulBits Cascaded Lookup", "ArtfulBits Cross-Site Lookup", "ArtfulBits Parent Selector" columns and standard SharePoint "Lookup" column	✔	✔	✔	✔
Language pack support (desired localization could be added by request)	✔	✔	✔	✔

Why ArtfulBits Cascaded Lookup Column?

SharePoint Cascaded Lookup is powerful lookup tool that saves your time by reducing presented options and avoids the possibility of incompatible value selection.

ArtfulBits Lookups and standard SharePoint Lookup columns feature comparison

Feature	SharePoint Lookup	Parent Selector	Cross-Site Lookup	Cascaded Lookup
Lookup data from lists cross-site within site collection			✔	✔
Lookup data from lists on the same site	✔		✔	✔
Lookup data from the same list	✔	✔	✔	✔
Single and multiple lookup	✔	✔	✔	✔
Parent-child relationships				✔
Support lookup data from subfolders		✔	✔	✔
Picker Dialog for searching items in lookup lists		✔	✔	
Filtering retrieved data using existing list views		✔	✔	✔
Supported default values		✔	✔	✔
Adding lookup items via New Item form on the fly			✔	✔
Adding lookup items via inline entering on the fly			✔	
Editing lookup items via Edit Item form on the fly			✔	✔
Excluding own item from lookup list during item editing		✔		
Checking whether hierarchical data is non-cyclic		✔		
Conversion among "ArtfulBits Cascaded Lookup", "ArtfulBits Cross-Site Lookup", "ArtfulBits Parent Selector" columns and standard SharePoint "Lookup" column	✔		✔	✔

How to Use

First of all, you should create several lists with different data (e.g. Single Line of Text Column) which you would like to use as a source. Then you need to create Cascaded Lookup Column which will relate to your data source. To use Cascaded Lookup column you should select appropriate option in the list of available columns on the Create Column page. Change default settings on Cascaded Lookup Special Settings section in order to adjust column to your needs. For multiple data entry, just select the "Allow multiple values" option, the front-end UI will allow multiple selections to be added/removed from a list. If you're using a series of parent-child Cascaded Lookups, each subsequent field will immediately update as you add or remove each selection from the prior one.

Cascaded Lookup settings:

- Source site to get information from (*This dropdown list shows all the sites in the current site collection. Choose the site which contains the source list*)
- Source list to get information from (*This dropdown list shows all the available lists in the site you have selected before. Choose source list which you retrieve information from*)
- Display column (from source list) and values to be displayed (*Select the source column which you want to get information from*). Supported source column types include: Single Line of Text, Number, Date and Time, Calculated (output is single line of text), Counter type (ID field).

- Parent Column (not required) for cascaded lookup (*located in the current list*) that triggers a change for this Cascaded Lookup column. If column is not provided, default Cross-Site Lookup column behavior will be applied (no cascading). Lookup, Person or Group, Choice, Single line of text, Yes/No column is available as parent column
- Filter Column (located in the source list) that provides filtering mechanism for this Cascaded Lookup Column. Lookup, Person or Group, Choice, Single line of text, Yes/No column is available as filter column
- "Allow multiple values" property allows multiple selections for Cascaded Lookup column
- "Use filtering by list view" option applies additional filter for proposed items in cascaded lookup (only items from the selected view could be presented in Cascaded Lookup field)

Example: there are two SharePoint lists: USA States (contains State column) and Cities (City, State column). You have third list (Customers) and need to add State and City column with parent-child relationships. In this case you should add State column (it can be standard SharePoint Lookup, ArtfulBits Cross-Site Lookup or ArtfulBits Cascaded Lookup). Add City column (ArtfulBits Cascaded Lookup) with parent-child relationships after that.

Do the following:

- In "Get information from the following site" drop-down list, select site that contains Cities list
- In "Get information from the following list", select Cities list
- In "Display the following column", select City column in Cities list
- In "Parent column for cascaded lookup", select State column of current list
- In "Filter by following column in source list", select State column from USA States list

After that State column value changing triggers a change of City column in customer's list.

In addition, there is useful property that allows adding items to the source list on the fly. For this, you should enable "*Item is added using separate list New Item form*" option in Cascaded Lookup Special Settings.

Document Library can be selected as lookup source list. In that case ArtfulBits Cascaded Lookup allows to lookup to subfolders. Checking "Use filter by subfolder" allows selecting exact folder from which data will be got. "Show the following items" section specifies which items (and/or folder) will be shown in selection drop-down.
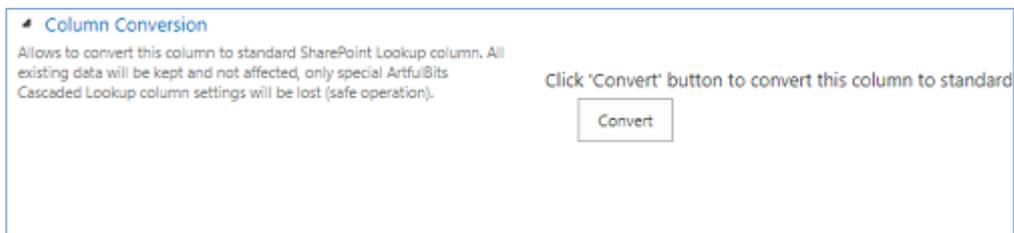

Conversion

Cascaded Lookup column supports conversion from standard "Lookup" column and vice versa (it allows editing content of Cascaded Lookup column in Datasheet view).

In order to convert Lookup Column to Cascaded, you should, first, create SharePoint Lookup column with items for your needs. The next step is creating new column and choosing "ArtfulBits Cascaded Lookup" type. In Column Conversion section select your Lookup column (*from drop-down list*) and click 'Convert' button to convert it to ArtfulBits Cascaded Lookup column.

In order to **convert Cascaded Column to Lookup Column**, you should choose ArtfulBits Cascaded Lookup column in List Settings Page and click "Convert" button (in Column Conversion section) to convert current column to standard SharePoint Lookup. Converting will keep the Cascaded Lookup settings when converting into a SharePoint Lookup column. Conversion of ArtfulBits Cascaded Lookup column to standard Lookup allows editing content in Datasheet view.

Release Notes

Version	Notes
v2.5 (December 10, 2018)	**New Features:** • Added SharePoint 2019 support (for classic mode)
v2.45 (September 14, 2018)	**Bugs Fixed:** • Error with duplicate values in Quick Edit fixed
v2.44 (June 15, 2017)	**Bug Fixed:** • Correct display of different column values' types • Document library with lookup column error is fixed • Lookup column default value can be provided now
v2.43 (May 15, 2017)	**New Features:** • Added support for REST API **Improvements:** • Default value changed from textbox to drop down • Corrected quick edit **Bugs Fixed:** • Fixed minor issues
v2.4 (March 28, 2016)	**New Features:** • Added SharePoint 2016 Support
v2.3 (February 29, 2016)	**New Features:** • Added datasheet edit for SharePoint 2013 • Added JSLink support for SharePoint 2013
v2.1 (December 02, 2014)	**New Features:** • Add all/Remove all" functionality added to item multi picker **Bugs Fixed:** • Fixed compatibility issue with SharePoint 2013

Version	Changes
v2.0 (April 29, 2013)	**New Features:** - Added SharePoint 2013 support - Added Russian and German localization
v1.48 (April 26, 2012)	**Improvements:** Improved adding and editing of the source list items on-the-fly
v1.47 (March 27, 2012)	**Improvements:** Improved performance
v1.46 (February 2, 2012)	**Bugs Fixed:** Fixed cross-site lookup data display in list view web part
v1.45 (January 26, 2012)	**Improvements:** Added filtering support by Content Type column
v1.44 (October 14, 2011)	**Bugs Fixed:** Fixed column required option
v1.43 (September 07, 2011)	**Improvements:** Added support of Managed Metadata column as Parent column
v1.42 (August 29, 2011)	**Bugs Fixed:** Fixed cascading lookup behavior in page layouts
v1.41 (August 08, 2011)	**Bugs Fixed:** Fixed column value if (None) is selected
v1.4 (June 01, 2011)	**New Features:** Added default values support **Improvements:** - Added support for new licensing model (ArtfulBits License Manager v1.4) - Added "Save site as template" support - Improved behavior with multilevel parent-child relationships, when Cascaded Lookup columns reference data from the same list
v1.37 (March 24, 2011)	**Improvements:** Removed duplicated values
v1.36 (March 19, 2011)	**Bugs Fixed:** Fixed field available values refreshing in multilevel parent-child relationships
v1.35 (March 12, 2011)	**Bugs Fixed:** - Fixed cascading lookup behavior when parent column has lookup type and is required - Fixed filtering by non lookup type column

v1.34 (January 05, 2011)	**Bugs Fixed:** • Cascaded Lookup update was not working properly in IE browser with parent lookup column with more than 20 items
v1.33 (December 23, 2010)	**Bugs Fixed:** • Fixed New/Edit item customized form
v1.32 (December 11, 2010)	**Improvements:** • Added Content Type support
v1.31 (November 26, 2010)	**Bugs Fixed:** • Fixed feature activation problem
v1.3 (November 16, 2010)	**New Features:** • Added Russian and German localization **Bugs Fixed:** • Fixed minor issues
v1.2 (September 02, 2010)	**New Features:** • Ability to edit lookup items via Edit Item form on the fly **Bugs Fixed:** • Fixed minor issues
v1.1 (August 03, 2010)	**New Features:** • Added Datasheet view support **Bugs Fixed:** • Fixed cascading behavior when Parent and Filter columns have different type
v1.0 (July 01, 2010)	**Initial Release**

See Also

ArtfulBits Blog

Professional Blog complements and extends SharePoint deffault functionality with the possibility of adding video or zoomable image and preview, providing tags for the blog entries, supporting the categorization and tags cloud, filtering the entries by category or tag, configurable global settings and many more.

Cascaded Lookup Column

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

Category Column

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.

Column Data Adapter

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

Column Permissions

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.

Discussion Column

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.

Email Web Part

ArtfulBits Email Web Part allows sending e-mail messages directly from Microsoft SharePoint site. You can notify task assigned users, send gratitude or just send regular e-mail message, etc.

Follow-Up Column

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.

Image Upload Column

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.

KPI Column

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.

Link to Document Column

Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.

Parent Selector Column

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.

Password Change Web Part

Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).
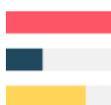
Password Expiration Web Part

Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.

Professional Calendar Web Part

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in one Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.

Progress Column

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page sing percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.

Shopping Cart Web Part

ArtfulBits Shopping Cart is intended to provide ecommerce functionality. This web part provides a possibility to exhibit items for sale, its basic information, items images, and price, chose the size or other category of item, submit an order and save order in history.

Video

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

Remarks

Information in this document may be outdated. Please, visit https://www.sharepoint-artfulbits.com/ for the latest product version.