



# **Cascaded Lookup 5.0**

---

## **User Guide**

## **Copyright**

Copyright ©2008-2013 BoostSolutions Co., Ltd. All rights reserved.

All material contained in this publication is protected by Copyright and no part of this publication may be reproduced, modified, displayed, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written consent of BoostSolutions.

Our web site: <http://www.boostsolutions.com>

## Contents

1.	Product Introduction .....	1
2.	Installation .....	2
2.1	Product Files .....	2
2.2	Software Requirements .....	3
2.3	Installation .....	3
2.4	Upgrade.....	5
2.5	Uninstallation .....	5
2.6	Command_Line Installation .....	5
2.7	Feature Activation.....	7
3.	Manage Cascaded Lookup Column.....	9
3.1	Settings for Cascaded Lookup.....	9
3.1.1	General Settings.....	9
3.1.2	Filter Settings .....	12
3.1.3	Appearance Settings .....	13
3.1.4	Additional Fields .....	16
3.1.5	Miscellaneous Settings.....	16
3.1.6	Target Column Settings .....	18
3.2	Create a Cascaded Lookup Column .....	18
3.3	Edit a Cascaded Lookup Column.....	21
3.4	Delete a Cascaded Lookup Column .....	21
3.5	Convert Column .....	22
3.5.1	Convert SharePoint Lookup to Cascaded Lookup.....	22
3.5.2	Convert Cascaded Lookup to SharePoint Lookup.....	23
4.	Using the Cascaded Lookup Column.....	24
4.1	Create a Relationship Using Single-select Lookup Field.....	24
4.2	Create a Relationship Using Multiple-select Lookup Field .....	26
4.3	Create a Reverse lookup column using Cascaded Lookup .....	27
5.	Manage Column Data with Microsoft Office Applications.....	29
6.	Technical Limitations .....	31
7.	Troubleshooting & Support .....	32
	Appendix 1: Glossary .....	33
	Appendix 2: License Management .....	34



## 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](http://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_V5_User Guide.pdf	User guide for Cascaded Lookup in PDF format.
Library\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
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.
Solutions\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\ CascadedLookup\BoostSolutions.CascadedLookupSetup14.5.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\ CascadedLookup\BoostSolutions.CascadedLookupSetup15.5.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for

	SharePoint 2013 or SharePoint Foundation 2013.
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 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 Mozilla Firefox Google Chrome

### SharePoint 2010

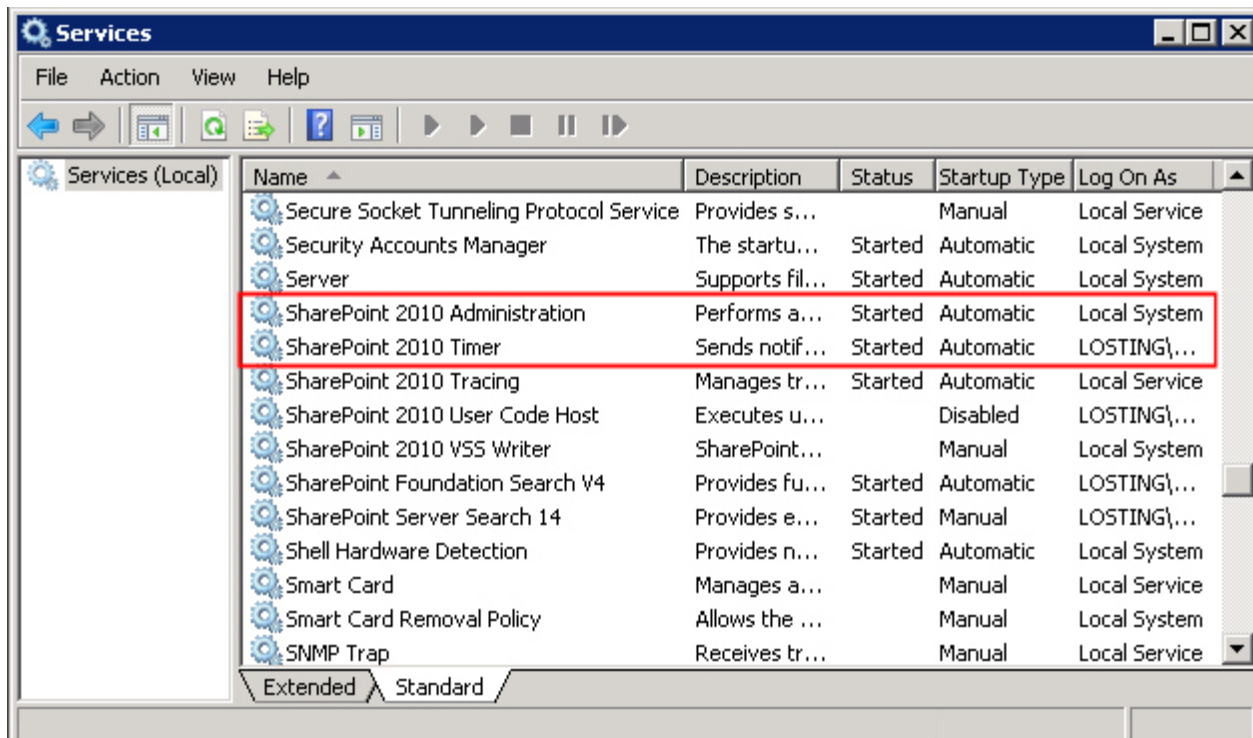
Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or greater Mozilla Firefox Google Chrome

## 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 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.
  - **SharePoint 2013**  
C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN
  - **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

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

```
stsadm -o addsolution -filename BoostSolutions.CascadedLookupSetup14.5.wsp  
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.CascadedLookupSetup14.5.wsp -  
allowgacdeployment -url [virtual server url] -immediate  
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.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.CascadedLookupSetup14.5.wsp  
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.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.CascadedLookupSetup14.5.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.CascadedLookupSetup14.5.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.CascadedLookupSetup14.5.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.FoundationSetup14.1.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.FoundationSetup14.1.wsp
```

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

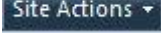
- c. Remove the solution from the SharePoint solutions storage:


```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.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. On the Site Actions menu  click **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 5.0.214.0**

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)

### **Activate Cascaded Lookup's features in Central Administration**

- Using the Quick Launch click **Application Management**.
- On the Application Management page, under Manage Applications, click **Manage Web applications**.
- Select a web application you want to configure and click **Manage Features** on the ribbon.
- Find Cascaded Lookup's features and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

**Manage Web Application Features**

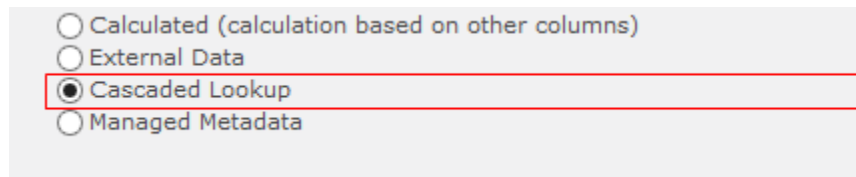
**Cascaded Lookup Data Adapter 5.0.214.0**

Provides the ability to manage Cascaded Lookup Column data in Microsoft Office applications like Excel, Access, Word and SharePoint Workspace. (Powered by BoostSolutions)

## 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.



A screenshot of the 'Create Column' page in SharePoint. It shows four radio button options: 'Calculated (calculation based on other columns)', 'External Data', 'Cascaded Lookup', and 'Managed Metadata'. The 'Cascaded Lookup' option is selected, indicated by a filled radio button and a red rectangular box around it.

#### 3.1.1 General Settings

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

General Settings

Get information from this site:  

Product Makert

Get information from this list:  

City

In this column:  

City

☐ Allow multiple values

Default value:  

☒ (None)
☐ The first value
☐ Customize value

☒ Make this a dependent column

Parent column in this list:  

Country

Filter by column in Target list:  

Country

Add more columns

- 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.

☒ Make this a dependent column

Parent column in this list:

Filter by column in Target list:

---

[+ 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**

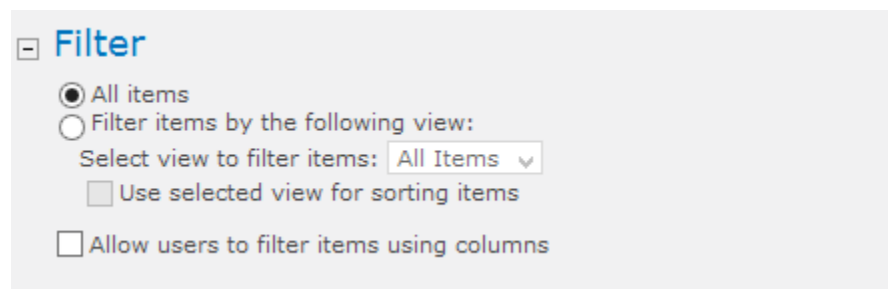
This column is located in the target list and is comparable to the parent column in order to filter displayed values.

**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).

### 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.



☒ Allow users to filter items using columns

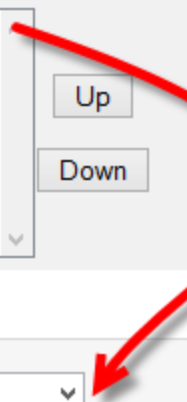
City  
Country:Country Coc  
Version

Add >  
< Remove

Country  
Up  
Down

City \*

Filter by Country:  
United States  
New York  
[Create New Item...](#)




### 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.

☒ **Appearance**

Display an icon for this column

☐ None  
☒ Choose an icon below  
☐ Enter the image web address ([Click to test](#))

 world
 [Select icon...](#)

Show related columns on Item View/Edit form:

Country  
Country(linked to iter  
Country Code  
Region  
City/State  
ID  
Modified  
Created  
Version

Add >  
< Remove

Up  
Down

Specify a style to display related columns

Dropdown list

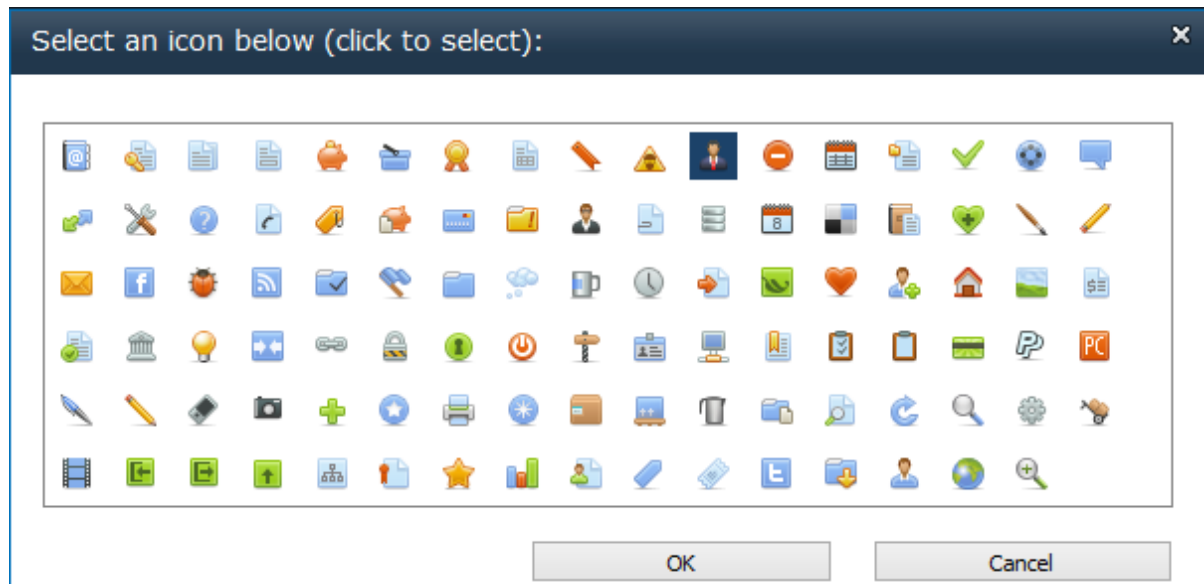
- **Display an icon for this column**

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:

Country	China
City	 Beijing

**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.

Show related columns on Item View/Edit form:

Country  
Country(linked to item)  
Created  
ID  
Modified  
Version

Add >  
< Remove

Country Code

Up  
Down

Specify style to display related columns

Table view

Country	Country	Country Code
	United States	1
	Germany	49

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.

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

China,86  
France,33  
Germany,49  
Russia,7  
United Kingdom,44

Add >  
< Remove

United States,1

Create New Item

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

Country	Country	Country Code
	United States	1
	Germany	49

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 ▼

### 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
- ☐ Company Name(linked to item)
- ☒ Web Site
- ☐ Address
- ☒ Telephone
- ☐ Fax
- ☐ Zip code
- ☒ Customer ID

### 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.

☐ **Miscellaneous**

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

☐ 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 (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:

Country
 

[Create new item...](#)

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

- **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:  
=Price\_cal\*Qty.

Insert Column:

- Created
- Discount
- Modified
- Order ID
- Payment Method
- Price\_cal
- Purchase Date
- Qty.
- Sales Tax
- Unit Price

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. 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:

- Specify a column name for this reverse lookup column.
- In the dropdown list, select a column which you want to look up from target list to current list.

☒ Create a reverse lookup field in the target list

Column name:  
Company Name

In this column:  
Company Name

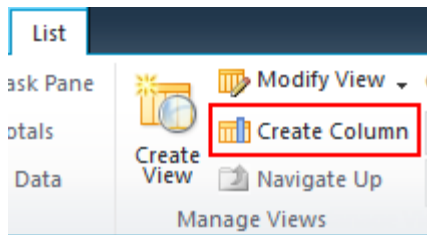
☐ Allow multiple values

- 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.

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

 A screenshot of the 'General Settings' dialog box for a Cascaded Lookup column. The dialog has a title bar with a minus sign and the text 'General Settings'. It contains several sections:
 

- Get information from this site:** A dropdown menu showing 'Product Makert'.
- Get information from this list:** A dropdown menu showing 'Country'.
- In this column:** A dropdown menu showing 'Country'.
- Allow multiple values:** An unchecked checkbox.
- Default value:** Three radio buttons: '(None)' (selected), 'The first value', and 'Customize value'. Below the radio buttons is an empty text input field.
- Make this a dependent column:** An unchecked checkbox.
- Parent column in this list:** A dropdown menu showing 'Region'.
- Filter by column in Target list:** A dropdown menu showing 'Country'.
- At the bottom, there is a green plus icon followed by the text 'Add more columns'.

- 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:

Select view to filter items: **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.

**Appearance**

Display an icon for this column

☐ None

☒ Choose an icon below

 world Select icon...

☐ Enter the image web address ([Click to test](#))

Show related columns on Item View/Edit form:

**Country** (selected)

- Country(linked to iter
- Country Code
- Region
- City/State
- ID
- Modified
- Created
- Version

Add > < Remove

Up Down

Specify a style to display related columns

**Dropdown list** ▼

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

**Miscellaneous**

☒ Enable creating a new item in the target list

Text to display:

☐ 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 (In the Calculated column , insert **lookupColumnName\_cal** in the formula.)

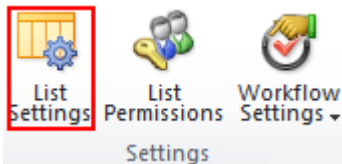


- VII. The Target Column Settings section is optional. To enable this feature, click **Create a reverse lookup field in the target list** option. (For more details, refer to Chapter 3 section 3.1.6 [Target Column Settings](#) )
- d. Click **OK** to save settings.

### 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.

#### Columns

A column stores information about each document in the document library:

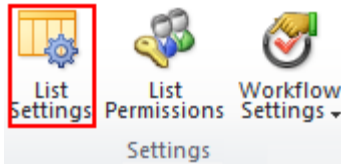
Column (click to edit)	Type
Title	Single line of text
Cross-Site Lookup column	Cross-Site Lookup
Cascaded Lookup column	Cascaded Lookup
Created By	Person or Group

- 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.

#### Columns

A column stores information about each document in the document library:

Column (click to edit)	Type
Title	Single line of text
Cross-Site Lookup column	Cross-Site Lookup
Cascaded Lookup column	Cascaded Lookup
Created By	Person or Group

- 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 Lookup 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:

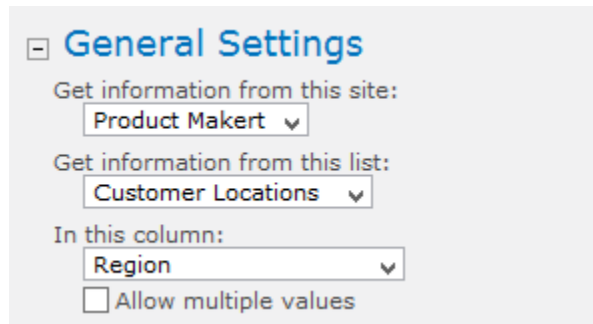
The screenshot shows the 'Accounts - New Item' form. The form has a title bar 'Accounts - New Item' with a close button. Below the title bar is a ribbon with tabs: 'Edit', 'Commit', 'Clipboard', 'Actions', and 'Spelling'. The 'Edit' tab is active, showing icons for Save, Cancel, Paste, Cut, Copy, Attach File, and Spelling. The form fields are as follows:

Company Name *	ITsoft
Web Site	
Telephone	212-460-3699
Fax	
Zip code	
Customer ID	
Region	North America <a href="#">Create new item...</a>
Country	United States <a href="#">Create new item...</a>
City/State	New York <a href="#">Create new item...</a>

A red box highlights the cascaded lookup columns (Region, Country, and City/State). A red callout box points to the Country and City/State columns with the text: "Country" column is filtered by the selected region  
"City/State" column is filtered by the selected country.

- **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.

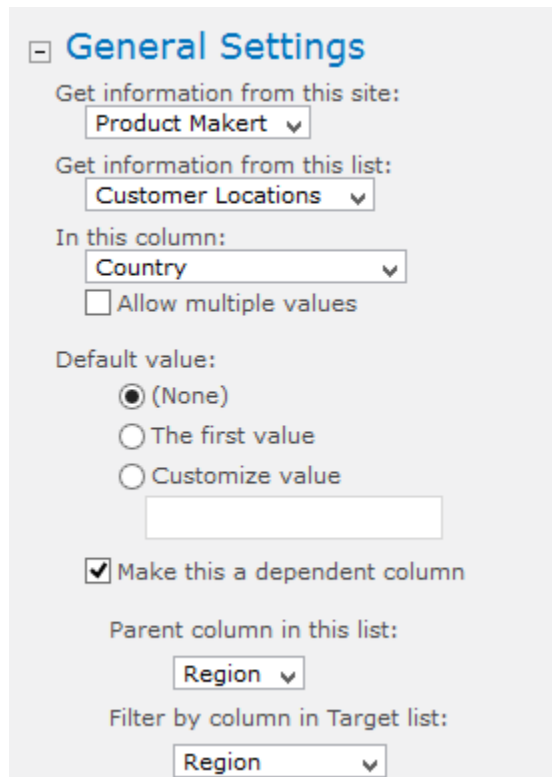


The screenshot shows the 'General Settings' panel for a column. It includes three dropdown menus: 'Get information from this site:' set to 'Product Makert', 'Get information from this list:' set to 'Customer Locations', and 'In this column:' set to 'Region'. There is an unchecked checkbox for 'Allow 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.



The screenshot shows the 'General Settings' panel for a column. It includes three dropdown menus: 'Get information from this site:' set to 'Product Makert', 'Get information from this list:' set to 'Customer Locations', and 'In this column:' set to 'Country'. There is an unchecked checkbox for 'Allow multiple values'. Below these are three radio button options for 'Default value': '(None)' (selected), 'The first value', and 'Customize value' (with an empty text input field). A checked checkbox for 'Make this a dependent column' is present. Below it are two dropdown menus: 'Parent column in this list:' set to 'Region' and 'Filter by column in Target list:' set to '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.

The screenshot shows the 'General Settings' section of a Cascaded Lookup configuration. It includes the following options:

- Get information from this site:** Product Makert (dropdown)
- Get information from this list:** Customer Locations (dropdown)
- In this column:** City/State (dropdown)
- ☐ Allow multiple values
- Default value:**
  - ☒ (None)
  - ☐ The first value
  - ☐ Customize value
- ☒ Make this a dependent column
- Parent column in this list:** Country (dropdown)
- Filter by column in Target list:** Country (dropdown)

## 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:

A marketing team needs to understand what types of companies, based on size, industry and global location they should focus their marketing on, based on past purchase orders. We have the following two lists:

**Company** – List of all partner companies and their relevant information (Companies, Industry, Size, and Location); this is the target list.

**Purchase Orders** – List of all purchase orders from companies. We will create the Cascaded Lookup column in this list.

The following shows the Cascaded lookup column:

In the **General Settings** section, select the Company list and select the Company column from the target list.

**General Settings**

Get information from this site:

Get information from this list:

In this column:

☒ Allow multiple values

In the **Filter** section, select Allow users to filter items using columns option and select Location, Industry and Company Size for filtering.

**Filter**

☒ All items  
☐ Filter items by the following view:  
 Select view to filter items:   
☐ Use selected view for sorting items

☒ Allow users to filter items using columns

Company  
 Version

Location  
 Industry  
 Company Size

### 4.3 Create a Reverse lookup column using Cascaded Lookup

There are two lists: Customers and Orders.

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

Account Name	Company Name	Street Address	Customer ID	Order ID
Lucy Green	Softit.com	Washington, DC 10347	CU-01286-V1Z5K5	
Tom Smith	ShareInfo	4233 Fariway Blvd	CU-01286-V1Z5K6	
Bill Bily	AABBC		CU-01286-V1Z5K7	ORD-232- A3E6; ORD-232- A3E2
Henry Morgen	DocVert	7111 Glenbrook Road	CU-01286-V1Z5K8	
Joe Lee	SPField	4401 Freidrich Lane   Bldg 2 Suite 200	CU-01286-V1Z5K9	
Ben Brown	ABC	5454 Wisconsin Avenue Suite 1100	CU-01286-V1Z5K10	

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

Account Name	Company	Product	Price	Sales Tax	Qty.	Line Total	Payment Method	Check No.	Discount	Order ID
Lucy Green	Softit.com	ShareDoc	599.00	\$0.00	2	\$1,198.00	Share-it	V24154545	\$239.60	ORD-232- A3E7
Ben Brown	ABC	DocMerger	1,099.00	\$0.00	1	\$1,099.00	Paypal	5562248	\$219.80	ORD-232- A3E3
Henry Morgen	DocVert	TransferDoc	699.00	\$0.00	1	\$699.00	Paypal	5562248	\$139.80	ORD-232- A3E4
Bill Bily	AABBC	DocViewer	799.00	\$0.00	2	\$1,598.00	Paypal	5562248	\$319.60	ORD-232- A3E2
Bill Bily	AABBC	DocMerger	1,099.00	\$0.00	1	\$1,099.00	Bank Transfer	11233	\$219.80	ORD-232- A3E6
Ben Brown	ABC	ComposeDoc	1,569.00	\$0.00	1	\$1,569.00	Bank Transfer	11233	\$313.80	ORD-232- A3E5

In this example, we will create a reverse lookup column in Customer list, which is used to create a bi-directional relationship between order and customer.

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

**General Settings**

Get information from this site:

Get information from this list:

In this column:

☐ 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:

In this column:

☒ Allow multiple values

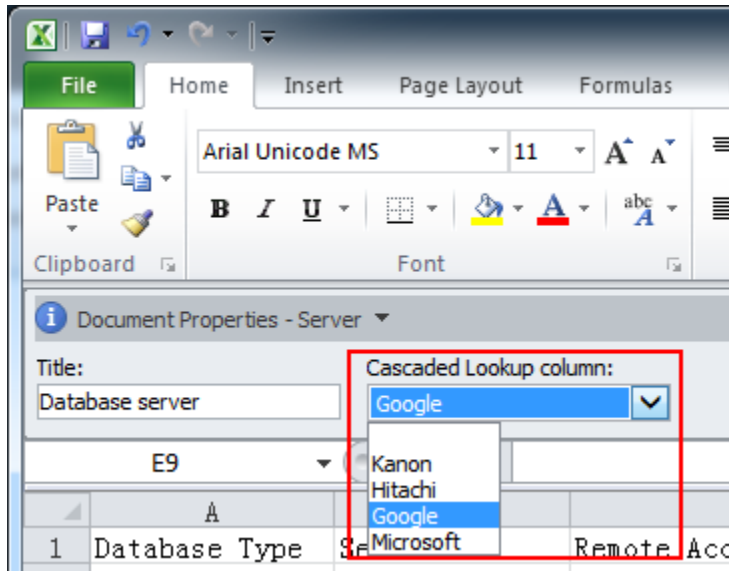


## 5. Manage Column Data with Microsoft Office Applications

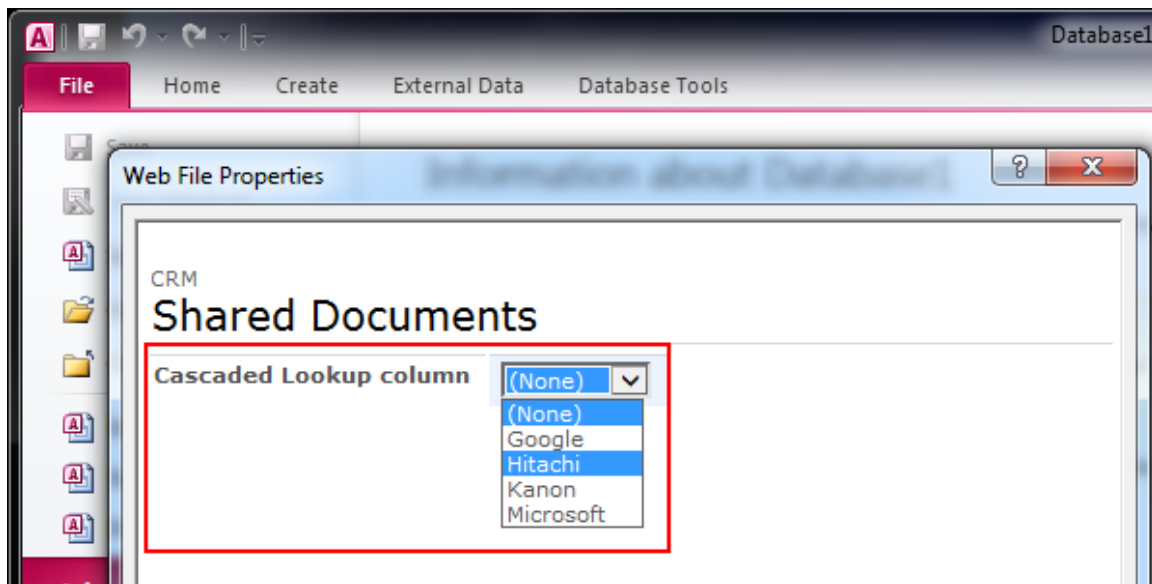
By default, SharePoint can only manage column data in Microsoft Office applications. Cascaded Lookup 4.0 and above provides a new **Data Adapter** Web Application feature that enhances the functionality of SharePoint with the ability to manage Cascaded Lookup columns in **Microsoft Excel**, **Microsoft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

To activate the Cascaded Lookup Data Adapter feature, please see section [2.7 Feature Activation](#).

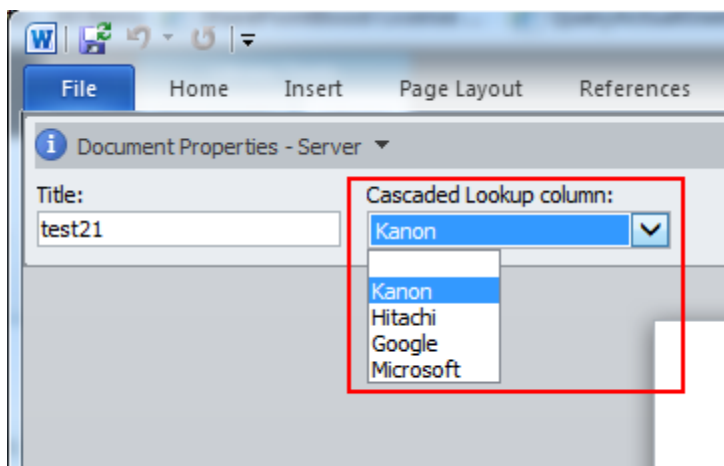
- **Microsoft Excel**



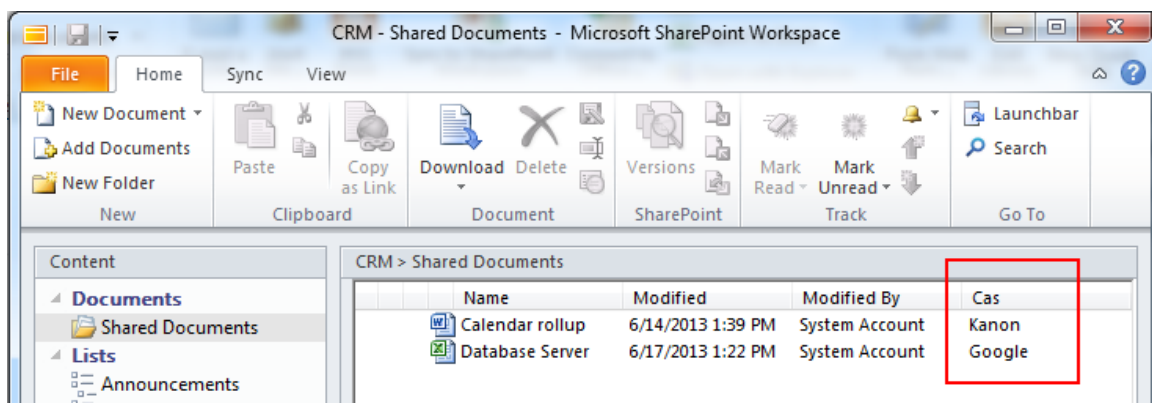
- **Microsoft Access**



- **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:**

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

### **Contact Info:**

Product & Licensing Inquires: [sales@boostsolutions.com](mailto:sales@boostsolutions.com)

Technical Support (Basic): [support@boostsolutions.com](mailto:support@boostsolutions.com)

Request a New Product or Feature: [feature\\_request@boostsolutions.com](mailto:feature_request@boostsolutions.com)

### **Live chat:**

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

## 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).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

**Choose a license type**

☒ Server License  
Server Code: e4c9171bd1aa49cea8903e0a7e0e812643f8360be  
a74459ca3bf6b2e0240f194

☐ Farm License  
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}  
Number of Users: 24 user(s)

☐ Site Collection License  
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change  
Site Collection: <http://pro-mac>

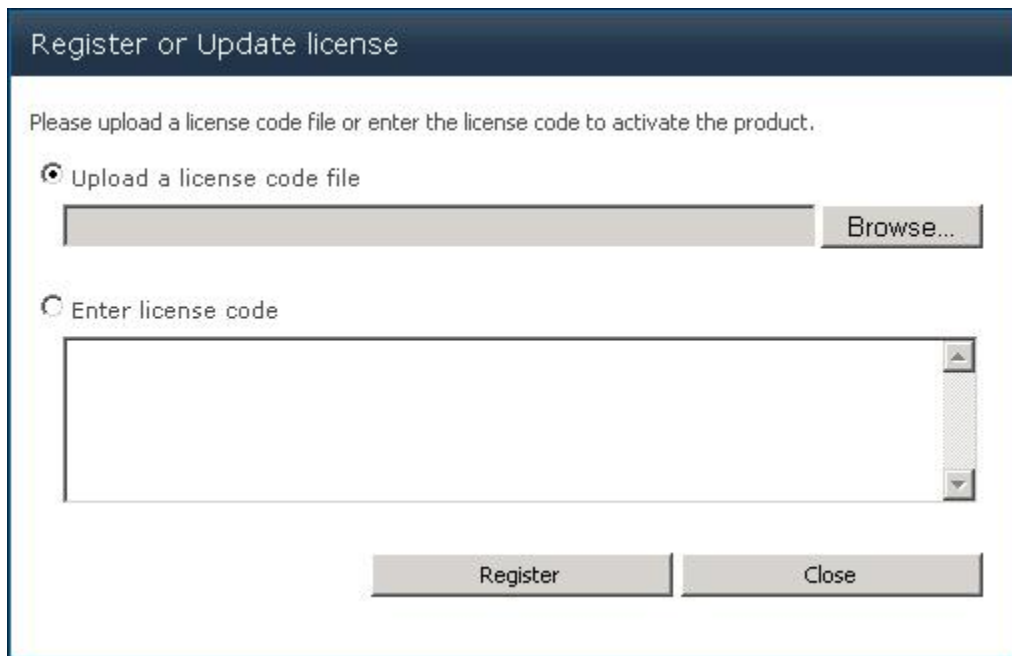
Download Close

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](mailto:sales@boostsolutions.com)) to generate a license code.

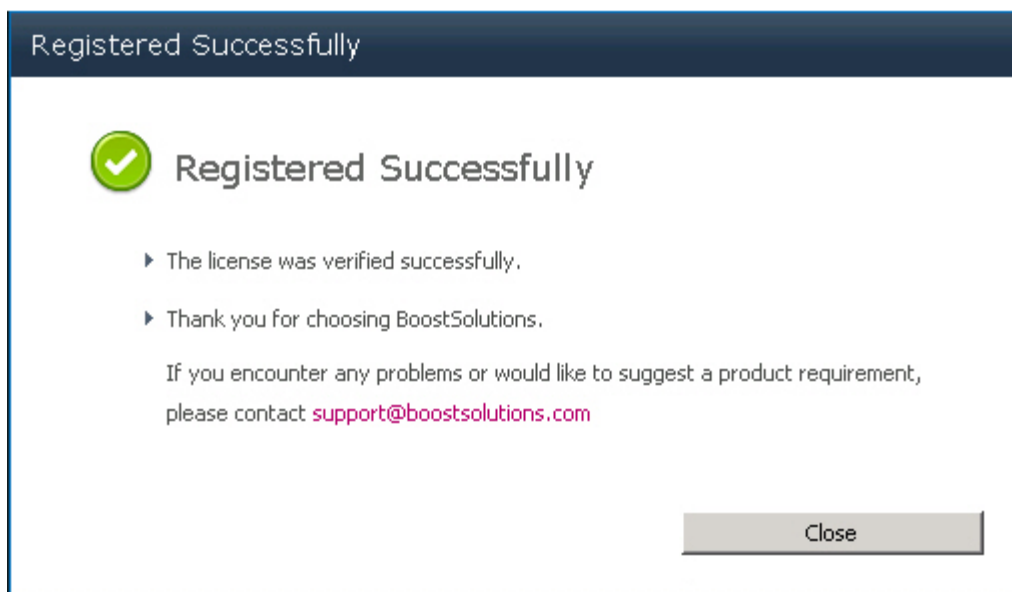
### License Registration

- 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.



The dialog box has a dark blue header with the title "Register or Update license". Below the header, the text "Please upload a license code file or enter the license code to activate the product." is displayed. There are two radio buttons: "Upload a license code file" (selected) and "Enter license code". The "Upload a license code file" option has a text input field and a "Browse..." button. The "Enter license code" option has a large text input field. At the bottom, there are two buttons: "Register" and "Close".

- c. Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.



The dialog box has a dark blue header with the title "Registered Successfully". Below the header, there is a green checkmark icon followed by the text "Registered Successfully". Below this, there are two bullet points: "The license was verified successfully." and "Thank you for choosing BoostSolutions." Below the bullet points, there is a paragraph of text: "If you encounter any problems or would like to suggest a product requirement, please contact [support@boostsolutions.com](mailto:support@boostsolutions.com)". At the bottom right, there is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).