BoostSolutions Cascaded Lookup App

User Guide

Copyright

Our web site: https://www.boostsolutions.com

Content

1.   Introduction

BoostSolutions' Cascaded Lookup App greatly enhances SharePoint's default lookup functions. It reduces waiting time by filtering the lookup results based on the parameters you set. You can establish column relationships between parent and child columns, where the data selected in the parent field determines the options presented in the child field.

Note:

- Cascaded Lookup works in grid view or Quick Edit view, but without the cascading feature.
- Access to the Cascaded Lookup app is not available in the SharePoint classic experience.

This user guide is intended to instruct users on how to use this app.

For the latest copy and other guides, please visit:

http://www.boostsolutions.com/download-documentation.html

2.   Manage Cascaded Lookup Column

2.1   Settings for Cascaded Lookup

Before adding a Cascaded Lookup column to a list, it would be helpful to understand its features.

- **Apply Cascaded Lookup custom form to content type**

This feature allows you to replace the native SharePoint New and Edit item forms with New cascaded item and Edit cascaded item forms. By doing so, you can utilize the cascading function when creating or modifying an item.

- **Get information from this site**

Specify the source site that contains the source list. The dropdown list displays all sites in the current site collection, allowing you to select any site from the list.

- **Select a list as a source**

Specify a source list from which you retrieve information. The dropdown list presents all available lists in the selected site.

- **Select a column from the list above**

Choose a source column from which you want to obtain information. A source column contains the data for the Cascaded Lookup dropdown list.

> ### Note
>
> Supported source column types include Single Line of Text, Number, Date and Time, Calculated (output is single line of text), ID, Modified, Created, and Version.

- **Cascading(s)**

In this section, you can establish cascading behavior and enable this field to be filtered by other fields in this list.

Set Cascading ✕

Parent column in this list

Country ⌄

✕

Filter by column in source list

Country ⌄

＋ Add cascading

⬤◯ Allow users to disable cascade feature

Parent column in this list

The parent column is located in the current list and is used to establish a connection with the filter column. It filters the column values based on the selected filter column (for example, a "City" dropdown list is filtered by a "Country" field in the same list).

> **Note**
>
> Supported parent column types include Choice (except for the filled in value mode), SharePoint Lookup, and Cascaded Lookup.

Filter by column in Source list

This column exists in the source list and serves as a comparison with the parent column to filter the displayed values.

> **Note**
>
> Supported filter column types include Choice, Single Line of Text, SharePoint Lookup (single value, and the source column is not Number or Date and Time), and Cascaded Lookup (single value, and the source column is not Number or Date and Time).

By enabling the "Allow users to disable cascade feature" option, users can choose to disable the cascade feature in the new or edit item form when they edit Cascaded Lookup columns.

- **Filter**

In this section, you can specify whether users can filter values based on a selected view or other column values.

All items

Display all items in the target list.

Filter items by a view

Set Filter   ✕

Filter items by a view

| Asia | ⌄ |

Only items that belong to the selected view are shown. This dropdown list displays all available public views.

All users to filter items using columns

Set Filter   ✕

Filter items by a view

| (All Items) | ⌄ |

☐ Use selected view to sort items

Allow users to filter items using columns
☑ Region
☑ Country
☐ City

For Choice and Lookup columns, you can select a value from the dropdown list.

However, if you choose a Single Line of Text column, you need to type the text for filtering. The following comparison operators determine the input and find the matching items:

▥ contains: Matches specific characters anywhere in the text.

↦ begins with: Matches the specified character at the beginning.

= equal: Matches column values that are equal to the specified value.

≠ not equal: Matches column values that are not equal to the specified value.

Take ▥ (contains) for example, let's consider the "Country" column and filtering for a city. If you type the text "ge" and select "contains," it will retrieve all country names that contain "ge" and display the corresponding cities.

⇄ City

▥ Country

| ge |

Hamburg, Europe, Germany

Berlin, Europe, Germany

Note

Supported filter column types include Choice, Single Line of Text, and SharePoint Lookup.

- **Show related columns on the New/Edit Cascaded Item form**

Select the columns from the target list that you want to display in the table view on the View/Edit Cascaded Item form.

The related columns can be shown in a dropdown list style on the Edit Cascaded Item form but cannot be displayed on the Item View form.

Show related columns on New/Edit Cascaded Item form

| Country, ZIP Code   ∨ |

⇄ City

▥ Country

| United States |

New York, United States, 10024

Chicago, United States, 60603

San Jose, United States, 16001

San Diego, United States, 92154

- **Add additional columns from source list**

This function allows you to add more columns to the lookup that will only be displayed on the list view page. It functions similarly to the native SharePoint Lookup column.

Add additional columns from source list

- [ ] Title
- [ ] Compliance Asset Id
- [x] Country
- [x] City
- [x] ZIP Code
- [ ] ID
- [ ] Modified
- [ ] Created
- [ ] Version

2.2   Create a Cascaded Lookup Column

After installing Cascaded Lookup on your SharePoint server, a Cascaded Lookup Settings command will be available in the list's top action bar as follows.

To configure the Cascaded Lookup settings in a list, you must have appropriate permissions in the list or be a member of a SharePoint Online group that has appropriate permissions in the list.

a.   Enter the target list and click **Cascaded Lookup Settings** in the top action bar. (The **Cascaded Lookup settings** are only available in the **SharePoint modern experience**.)

Export ∨   ⊕ New cascaded item   ⚙ Cascaded Lookup settings   · · ·
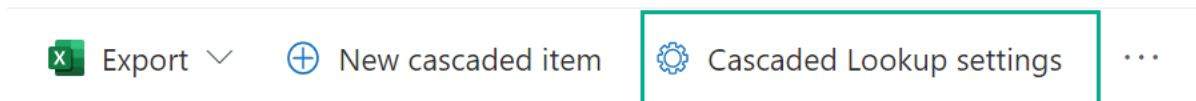
b.   In the **Cascaded Lookup** control panel dialog, click **Create a Cascaded Lookup Column** > **New Cascaded Lookup Column**.

You can create a Cascaded Lookup column by converting an existing SharePoint Lookup column. We will demonstrate how to do this in .

Cascaded Lookup Settings   ✕

Manage your Cascaded Lookup column settings

Create a Cascaded Lookup Column ⌄

New Cascaded Lookup Column   olumns in

From a Lookup Column
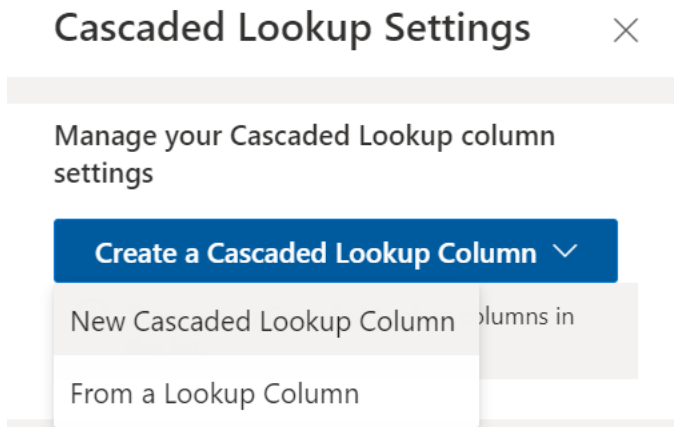
c. Give a meaningful name to this column.

d. Under the **Get information from this site** section, **select the site where the source list is located.**

e. Under **Select a list as a source**, choose the source list.

f. Under **Select a column from the list above**, **select the column you want to display on the target list from the source list.**

Get information from this site *

Customer Center   ⌄

Select a list as a source *

Locations   ⌄

Select a column from the list above *

City   ⌄

> ***Note***
>
> Supported source column types include Single Line of Text, Number, Date and Time, Calculated (output is single line of text), ID, Modified, Created, and Version.

g. Under **Cascading(s)**, click **Set Cascading** to establish a cascading relationship. In this section, you can define cascading behavior and enable this field to be filtered by other fields in this list.

h. Under **Filter**, click **Set Filter** to specify whether users can filter values based on the selected view or other column values.

i. Under **Show related columns on New/Edit Cascaded Item form**, select columns from the source list that you want to display **in the table** view on the View/Edit form.

j. To display additional lookup information from the source list on the target list, select them under **More options**.

k. Click **Save** to save the settings.

2.3   Edit a Cascaded Lookup Column

After creating a Cascaded Lookup column, you can change its settings. However, you cannot edit the source site or source list.

a. Enter the target list and click **Cascaded Lookup Settings** in the top action bar.

b. Click the name of the Cascaded Lookup column you want to edit.

c. Modify the desired settings and then click **Save**.

2.4   Delete a Cascaded Lookup Column

This procedure deletes the Cascaded Lookup column and any data stored in it. Once deleted, the Cascaded Lookup column cannot be restored from the Recycle Bin.

a. Enter the target list and click **Cascaded Lookup Settings** in the top action bar.

b. Click **Delete** for the Cascaded Lookup column you wish to remove.

c. When prompted, click **OK**.

2.5   Convert Column

This function allows you to convert between Cascaded Lookup and SharePoint Lookup columns without creating new lookup columns. The conversion will retain the Cascaded Lookup settings when converting from a Cascaded Lookup to a SharePoint Lookup column.

2.5.1 Convert SharePoint Lookup to Cascaded Lookup

This function enables you to convert a SharePoint Lookup column into a Cascaded Lookup column.

a. Enter the target list and click **Cascaded Lookup Settings** in the top action bar.

b. Click **Create a Cascaded Lookup Column** > **From a Lookup Column**.

Manage your Cascaded Lookup column settings

Create a Cascaded Lookup Column ∨

New Cascaded Lookup Column   olumns in

From a Lookup Column
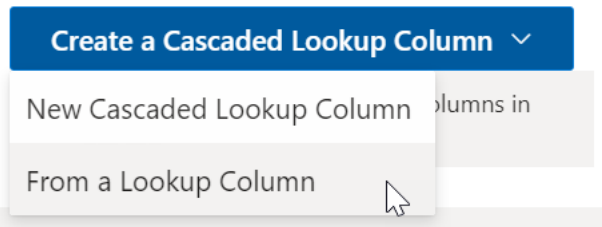
c. From the dropdown list, select the Lookup column you want to convert into a Cascaded Lookup column and click **Convert**.

Convert Lookup Column   ✕

Select a Lookup column
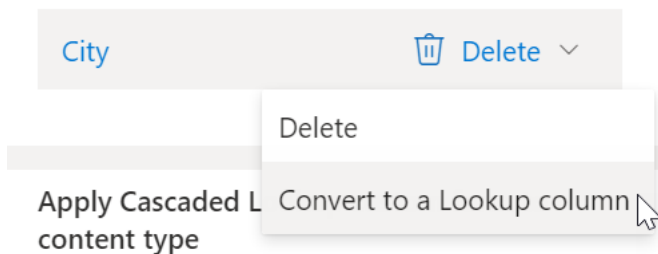
Lookup   ∨

d. The Cascaded Lookup column will be created and can be found in the Cascaded Lookup Settings panel.

e. You can modify the settings of this Cascaded Lookup column as needed.

2.5.2 Convert Cascaded Lookup to SharePoint Lookup

This function allows you to convert a Cascaded Lookup column into a SharePoint Lookup column.

a. Enter the target list and click **Cascaded Lookup Settings** in the top action bar.

b. Click **Convert to a Lookup column** for a Cascaded Lookup column.

City   🗑 Delete ∨

Delete

Apply Cascaded L Convert to a Lookup column
content type

c. The **column will be** converted to a SharePoint Lookup column in the list.

3.   Manage Cascaded Items

The Cascaded Lookup column does not work in the native SharePoint item form. Therefore, if you want to use the cascading function when creating or editing an item, you need to click the "New Cascaded Item" or "Edit Cascaded Item" command on the list bar.

To access the "New Cascaded Item" and "Edit Cascaded Item" features, you must have appropriate permissions in the list or be a member of a SharePoint Online group that has appropriate permissions in the list.

3.1   New Cascaded Item

To create a new item with the cascading function, click **New Cascaded Item**.
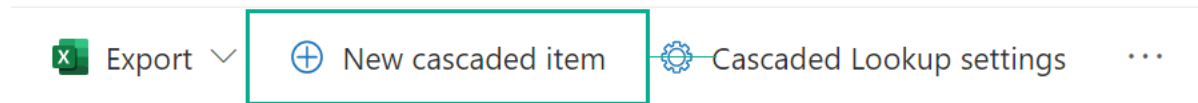
In the New item form, fill in the required information and click the Save button.

New item

Abc **Customer** *

Focus

Abc **Contact**

Mary Beson

✓ **Industry**

IT   ⌄

Abc **E-mail**

mary.beson@focus.com

⇄ **Region**

North America   ✕

⇆ **Country**

United States   ✕
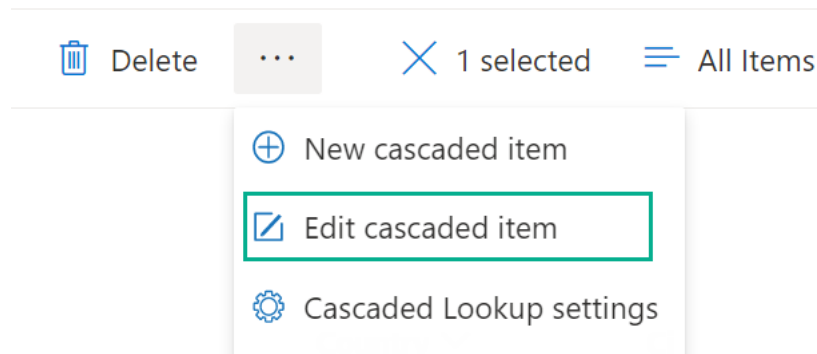
⇆ **City**

San Jose   ✕

📎 **Attachments**

Add attachments

Save   Cancel

3.2   Edit Cascaded Item

To edit an item with the cascading function, select the item and click **Edit Cascaded Item** on the list bar.

🗑 Delete   · · ·   ✕ 1 selected   ☰ All Items

⊕ New cascaded item

📝 Edit cascaded item

⚙ Cascaded Lookup settings

In the Edit item form, make the desired changes and click the Save button.

Edit item

Ⓐ **Customer** *

Focus

Ⓐ **Contact**

Mary Beson

✓ **Industry**

IT   ⌄

Ⓐ **E-mail**

mary.beson@focus.com

⇄ **Region**

North America   ✕

⇆ **Country**

United States   ✕

⇆ **City**

New York   ✕

📎 **Attachments**

Add attachments

Save   **Cancel**

4.   Scenarios

4.1   Create a Relationship Using the Single-selected Lookup Field

Sometimes, you need a column to be filtered by another column in the same list or library. In this scenario, we will use the classic example "Region > Country > City" to demonstrate how it's done.

We have the following two lists:

Locations - Lists some Regions, Countries, and Cities; it will be used as the source list. The "Region" column is changed from the "Title" column in the list.

Locations ☆

Region	Country	City
Asia	China	Beijing
Asia	Japan	Tokyo
Asia	Korea	Seoul
Asia	Singapore	Singapore
North America	United States	New York
North America	United States	Chicago
North America	United States	San Jose
North America	United States	San Diego
Europe	Germany	Hamburg
Europe	Germany	Berlin
Europe	Spain	Madrid
Europe	Italy	Rome

Customers - Lists information about customers. In this example, we will create some Cascaded Lookup columns in this list.

Customers ☐

Customer	Contact	Industry	E-mail
Diff Inc	Peter Talbot	IT	peter@diff.inc.com
Anton	Emily Jones	Finance	emily@anton.com
Dottm	Michael Deneys	Health	michael@bottm.local

The following steps show the creation of three Cascaded Lookup columns: Region, Country, and City.

Abc **Customer** *

Diff Inc

Abc **Contact**

Peter Talbot

✓ **Industry**

IT ⌄

Abc **E-mail**

peter@diff.inc.com

⇄ **Region**

Europe ✕

Country column is filtered by the selected region

⇆ **Country**

Spain ✕

City column is filtered by the selected country

⇆ **City**

Madrid ✕

◻ **Attachments**

Add attachments

- Region

In the **Customers** list, create a Cascaded Lookup column called Region. This column is connected to the "Title" (Region) column in the **Locations** list.

New Cascaded Lookup Column ✕

Name *

```
Region
```

Description

```



```

Get information from this site *

```
Customer Center                         ⌄
```

Select a list as a source *

```
Locations                               ⌄
```

Select a column from the list above *

```
Title                                   ⌄
```

- Country

Create another Cascaded Lookup column called **Country** in the **Customers** list. This column is connected to the "Country" column in the **Locations** list.

Click **Set Cascading** and specify "Region" as the **Parent column in this list** and "Title" as the **Filtered by column in the source list** options.

New Cascaded Lookup Column ✕

Name *

> Country

Description

Get information from this site *

> Customer Center ⌄

Select a list as a source *

> Locations ⌄

Select a column from the list above *

> Country ⌄

Cascading(s)

Region(parent) = Title(child)

> Set Cascading

Set Cascading ✕

Parent column in this list

> Region ⌄

Filter by column in source list

> Title ⌄

- City

Create another Cascaded Lookup column called "City" in the Customers list. This column should be connected to the "City" column in the Customers list.

Click on **Set Cascading** and **specify "Country" for both the Parent column in this list** and **the Filtered by column in source list** options.
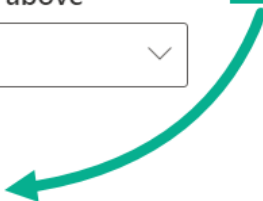
4.2 Create a Relationship Using Multiple-selected Fields

Sometimes, you may need a column to be filtered by multiple columns in the same list or library. We will use the following scenario.

We have the following two lists:

Issue Type - This list contains all the issue types, subcategories, and areas. This will be our source list.

Issue Type ☆

Issue Type ⌄	Subcategory ⌄	Area ⌄
Incident	Performance	Error Message
Incident	Failure	Job Failed
Incident	Failure	Authorization Error
Incident	Performance	Long Run
Complanit	Service Delivery	Availability
Complanit	Service Delivery	Late Response
Complanit	Failure	Browser Issue
Service Request	Data	File Corrupted
Service Request	Data	Limit Exceeded
Others	Hardware	Failure

Cases – This list records the issues of customers. In this example, we will create a Cascaded Lookup column named "Area" in this list.

Cases ☆

Case ID ⌄	Case Status ⌄	Assigned To ⌄	Product ⌄
CAS-12T2DF-001	Closed	Danies Liu	ADA
CAS-12T2DF-002	Closed	Megan Bowen	ADIS
CAS-12T2DF-003	Closed	Lynne Robbins	CVP
CAS-12T2DF-004	Closed	Adele Vance	DOCSHARE
CAS-12T2DF-005	Deferred	Adele Vance	DOCSENDER

The following image shows the Cascaded Lookup column where the area is filtered by the selected issue type and subcategory.

Ⓐ Case ID *

CAS-12T2DF-001

✓ Case Status

Closed   ⌄

⊗ Assigned To

Ⓐ Danies Liu ✕

⇄ Related Cases

CAS-12T2DF-004 ✕

⇄ Product

ADA ✕

⇄ Case Area

☰ Issue Type   ☰ Subcategory   **Case Area** is filtered by the selected issue type and subcategory

Incident   ⌄   Performance   ⌄

Error Message

Long Run

In the settings section, select the "Issue Type" list and choose the "Area" column from the source list.

In the Filter section, select "Issue Type" and "Subcategory" to filter the "Area" column.

Name *

Case Area

Description

Get information from this site *

Support Center

Select a list as a source *

Issue Type

Select a column from the list above *

Area

Cascading(s)

There are no cascading settings.

Set Cascading

Filter

Filter by columns:
Issue Type Subcategory

Set Filter

Set Filter   ✕

Filter items by a view

(All Items)

☐ Use selected view to sort items

Allow users to filter items using columns

☐ Title

☑ Issue Type

☑ Subcategory

☐ Area

Appendix 1: Subscription Management

You can use the Cascaded Lookup App trial subscription for a period of 30 days from the day you first use it.

If the trial subscription period ends, you will need to purchase a subscription.

The subscription for the Cascaded Lookup App is per site (previously called "site collection") or tenant, and it is billed annually.

For a site collection subscription, there are no end-user limitations. All users in the site collection can access the app.

For a tenant subscription, there are no limitations on sites or site collections. All users can access the app in all sites or site collections within the same tenant.

Checking Subscription Status

a. When you open the Cascaded Lookup dialog, the subscription status will be shown at the top of the dialog. If the subscription is about to expire within 30 days, the notification message will always show the days left.
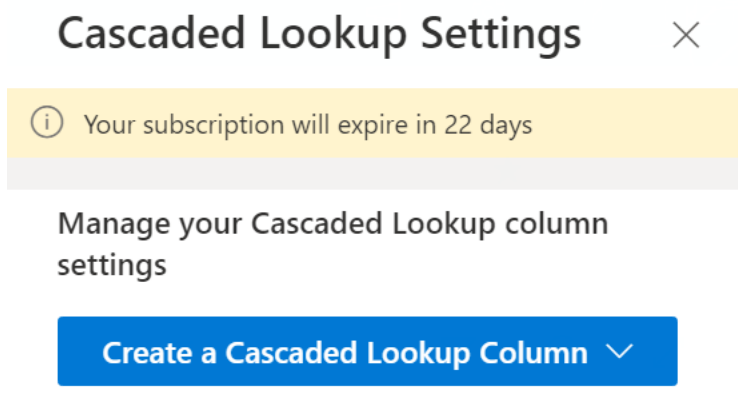
b. To update the subscription status, please click on the notification message, and the License Information dialog will appear.

License Information ✕

Your subscription will expire in 22 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Cascaded Lookup 🛍
License Type:	Site
Expiration Date:	6/20/2023 ↻

Click the refresh icon next to the expiration date, and the new status will be loaded.

c. Once the subscription status changes to "Your subscription is invalid" as shown below, it means that your subscription has expired.

Cascaded Lookup Settings ✕

ⓘ Your subscription is invalid.

Manage your Cascaded Lookup column settings

Create a Cascaded Lookup Column ⌄

d. Please send us (sales@boostsolutions.com) the Site URL/Site ID/Tenant ID to proceed with a subscription or renewal.

e. If you purchase a site (site collection) subscription, the license status will be as follows.

The license type is Site.

License Information   ✕

Your subscription will expire in 352 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Cascaded Lookup
License Type:	Site
Expiration Date:	5/15/2024

f.   If you purchase a tenant subscription, the license status will be as follows.

The license type is Tenant.

License Information   ✕

Your subscription will expire in 343 days

Tenant ID:	ae586225-a936-4e32-b424-6a57e257cf0c
Site ID:	{6ac53356-aa8c-4bc4-acd3-1d4163e15ac0}
Site Url:	https://bsmark.sharepoint.com/sites/TutorialWeb...
Product:	BoostSolutions Cascaded Lookup
License Type:	Tenant
Expiration Date:	5/6/2024