

ArtfulBits Cross-Site Lookup Column

(with Search Function)
for Microsoft® SharePoint®

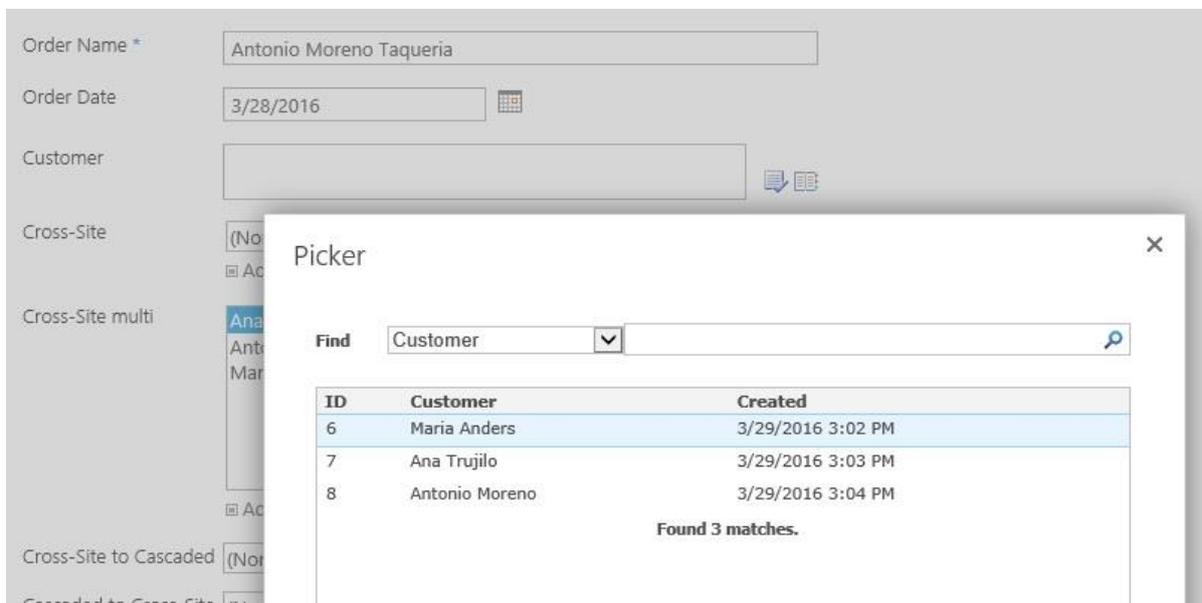


User Guide

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Overview

Cross-Site Lookup Column is intended to enhance standard SharePoint lookup functionality. Component allows getting information from any site within site collection, applying list view filtering to retrieved data. Component delivers a powerful function of searching over lookup list. This function provides substring matching in selected column. It is very useful for large lists with over 100 items.



Order Name *

Order Date 

Customer

Cross-Site

Cross-Site multi

Cross-Site to Cascaded

Cascaded to Cross-Site

Picker ✕

Find 

| ID | Customer | Created |
|----|----------------|-------------------|
| 6 | Maria Anders | 3/29/2016 3:02 PM |
| 7 | Ana Trujilo | 3/29/2016 3:03 PM |
| 8 | Antonio Moreno | 3/29/2016 3:04 PM |

Found 3 matches.

Also, there is a useful feature for adding items on fly. Two methods are available with this purpose: via new item form or inline entering:

Cross-Site Lookup (new item adding) (None) ▼

Add new item

Cross-Site Lookup (new item adding on fly) (None) ▼

Created at 9/1/2017 4:45 PM by sptestadmin Save

Last modified at 12/5/2017 1:29 PM by sptestadmin Cancel

Feature List

| Feature | SharePoint 2010 | SharePoint 2013 | SharePoint 2016 |
|---|--------------------|--------------------|--------------------|
| Supported lookup data from SharePoint lists in all sites within site collection | ✓ | ✓ | ✓ |
| Supported lookup data from subfolders | ✓ | ✓ | ✓ |
| Powerful function of searching over lookup list. Using a Picker Dialog for searching items in lookup lists. | ✓ | ✓ | ✓ |
| Filtering retrieved data using existing list views | ✓ | ✓ | ✓ |
| Single and multiple lookup for standard mode and using Picker Dialog | ✓ | ✓ | ✓ |
| Supported default values | ✓ | ✓ | ✓ |
| Supported Datasheet view | ✓ | ✓ | ✓ |
| Conversion among "ArtfulBits Cross-Site Lookup" column and standard SharePoint "Lookup" column | ✓ | ✓ | ✓ |
| Ability to add and edit lookup items on the fly | ✓ | ✓ | ✓ |
| Language pack support (desired localization could be added by request) | ✓ | ✓ | ✓ |

Why ArtfulBits Cross-Site Lookup Column?

Default SharePoint Lookup supports only lookup within the same site, so if you need to lookup data from another site, you cannot use it. **ArtfulBits Cross-Site Lookup** allows users to refer to a list from any site in site collection.

If you want to allow the user to select only some specific items (filtered by desired criteria), you can use filter enabling "Use filtering by list view" option in column settings.

If list contains large amounts of data, it is not very efficient to search for some data using standard SharePoint lookup. **ArtfulBits Cross-Site Lookup** with **Picker Dialog** helps to resolve this issue. You can search/filter data in picker dialog, which helps to find the required item quickly.

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

To use Cross-Site Lookup column you must select appropriate option in the list of available columns in the Create Column page. Cross-Site Lookup column supports such target column types as Single Line of Text, Number, Date and Time, Calculated (single line output text), Counter type (ID field).

You can change default settings in the Cross-Site Lookup Special Settings section in order to adjust column mode to your needs. You can select the lookup information (site, list, target column) from the appropriate drop-down lists.

Also, you can select the option which makes other columns available in that list. For this, you should add a column, which shows additional fields.

You can enable adding of lookup items on the fly by choosing **Item is added using separate list New Form** or **Item is added on fly directly on current page** option.

Cross-Site Lookup Special Settings
Specify special Cross-Site Lookup options.

Get information from the following site:

Get information from the following source list:

Display the following column:

Allow multiple values

Use Picker Dialog

Use filter by list view

Default value:
 Disabled

Item is added using separate list New Item form (display 'Add new item' link)

Item is added on fly directly on current page (display TextBox and 'Add New Item' button)

Allow items editing of the source list

Disabled

Item is edited using separate list Edit Item form

Add a column to show each of these additional fields:

Created

ID

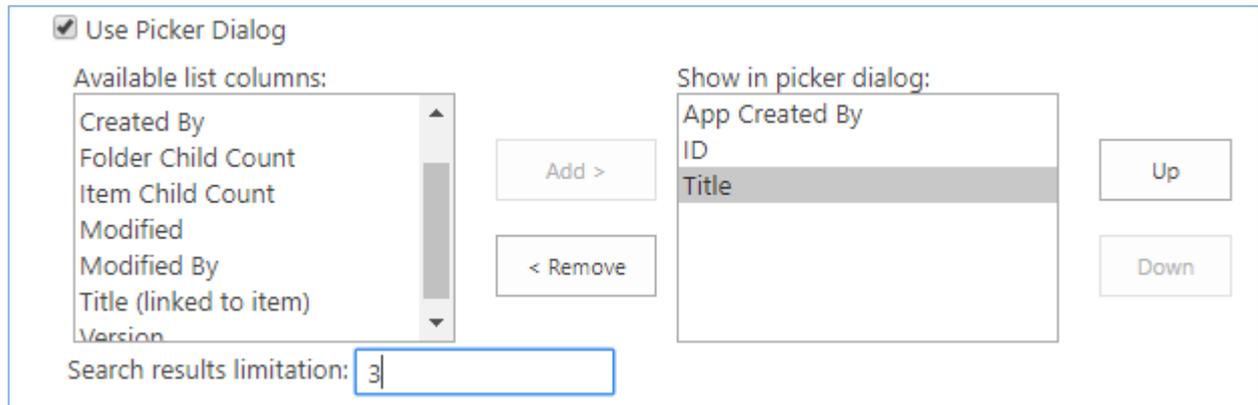
Modified

Title

Title (linked to item)

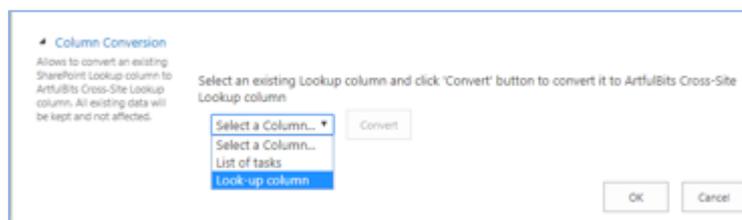
Version

You can also use picker dialog in the Cross-Site Lookup. You need to check the corresponding check box in the settings of Cascaded Column. The following settings will be displayed. Available columns are shown in the first list. You can select the values which will be present in the picker dialog. You can also restrict the amount of search results that will be displayed in Picker box. For this, you should add necessary value into "Search results limitation" field.

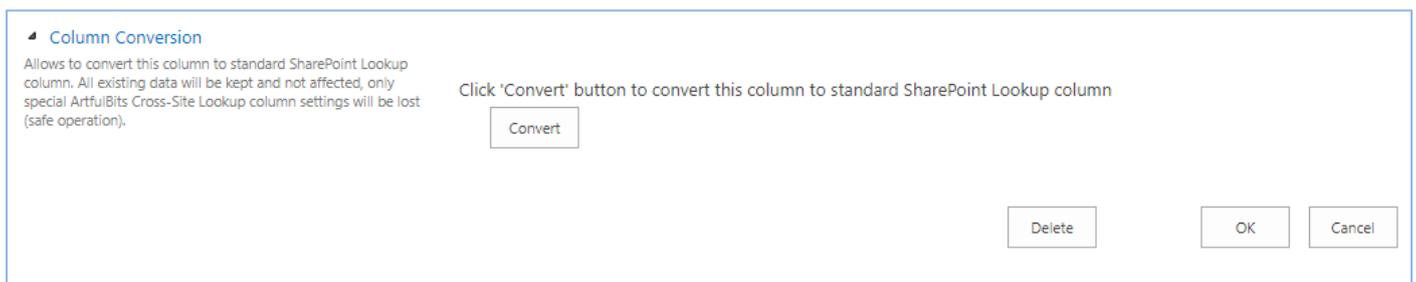


Conversion

Supported converting of standard "Lookup" column to "ArtfulBits Cross-Site Lookup" column and vice versa (it allows editing content of Cross-Site Lookup columns in Datasheet view). To make a conversion from standard "Lookup" column to "ArtfulBits Cross-Site Lookup", firstly, you should click "Add new column" and select "ArtfulBits Cross-Site Lookup" type. Secondly, navigate to Column Conversion section and select an existing SharePoint Lookup column (from drop-down list). Finally, click 'Convert' button to convert it to "ArtfulBits Cross-Site Lookup".



To make conversion from "ArtfulBits Cross-Site Lookup" column to standard "Lookup" column you should navigate to "List Settings" Page and select "ArtfulBits Cross-Site Lookup" column from available List Columns. On "Edit Column" page navigate to Column Conversion section and click "Convert" button to finalize this process.



Release Notes

| Version | Notes |
|-----------------------------|---|
| v2.32 (June 15, 2017) | Bugs Fixed: <ul style="list-style-type: none"> • Correct display of different column values' types • Document library with lookup column error is fixed • Lookup column default value can be provided now |
| v2.31 (May 15, 2017) | Improvements: <ul style="list-style-type: none"> • Default value changed from textbox to drop down Bugs Fixed: <ul style="list-style-type: none"> • Fixed minor issues |
| v2.1 (April 1, 2016) | New Features: <ul style="list-style-type: none"> • Added SharePoint 2016 support |
| v2.0 (April 29, 2013) | New Features: <ul style="list-style-type: none"> • Added SharePoint 2013 support • Added possibility of setting up the maximum number of items for picker dialog search. • Added Russian and German localization |
| v1.83 (April 26, 2012) | Improvements: <ul style="list-style-type: none"> • Improved adding and editing of the source list items on-the-fly |
| v1.82 (February 2, 2012) | Bugs Fixed: <ul style="list-style-type: none"> • Fixed cross-site lookup data display in list view web part |
| v1.81 (December 2, 2011) | Bugs Fixed: <ul style="list-style-type: none"> • Fixed column value editing using Picker Dialog • Fixed minor issues |
| v1.8 (June 01, 2011) | New Features: <ul style="list-style-type: none"> • Added default values support Improvements: <ul style="list-style-type: none"> • Added support for new licensing model (ArtfulBits License Manager v1.4) • Added "Save site as template" support |
| v1.7 (November 16, 2010) | New Features: <ul style="list-style-type: none"> • Added Russian and German localization Bugs Fixed: <ul style="list-style-type: none"> • Fixed minor issues |
| v1.6 (September 2, 2010) | New Features: <ul style="list-style-type: none"> • Ability to edit lookup items via Edit Item form on the fly |
| v1.5 | New Features: |

| | |
|----------------------------|--|
| (August 3, 2010) | <ul style="list-style-type: none"> Added Datasheet view support |
| v1.43 (July 8, 2010) | Bugs Fixed: <ul style="list-style-type: none"> Fixed lookup to sub folder (column settings page issue) |
| v1.42 (June 23, 2010) | Bugs Fixed: <ul style="list-style-type: none"> Fixed "Allow multiple values" property changing issue (from False to True) Fixed error with 6622 Event ID in Event Viewer (Field type DummyField has duplicated definition) |
| v1.41 (June 11, 2010) | New Features: <ul style="list-style-type: none"> Improved Setup Wizard Bugs Fixed: <ul style="list-style-type: none"> Disabled ability of choosing DateTime and Number column as lookup target column for SharePoint 2007 |
| v1.4 (May 28, 2010) | New Features: <ul style="list-style-type: none"> Added ability to lookup data from subfolder |
| v1.3 (May 13, 2010) | New Features: <ul style="list-style-type: none"> Added ability to show additional fields (SharePoint 2010 only) Added relationships behavior: restrict or cascaded deleting (SharePoint 2010 only) Improvements: <ul style="list-style-type: none"> Added support DateTime and Number columns as target columns Lookup entries sorting during item editing |
| v1.2 (April 22, 2010) | New Features: <ul style="list-style-type: none"> SharePoint 2010 support added Bugs Fixed: <ul style="list-style-type: none"> Sorting for lookup multiple values (disabled) |
| v1.1 (February 1, 2010) | Bugs Fixed: <ul style="list-style-type: none"> Problem with product version (Setup Wizard only) |
| v1.1 (January 12, 2010) | New Features: <ul style="list-style-type: none"> Added ability adding of lookup items on the fly Improvements: <ul style="list-style-type: none"> Improved picker dialog (Lookup or Title columns are selected by default) Improved column conversion (it is now easier and more clear) Improved Setup Wizard |
| v1.0 (November 2, 2009) | Initial Release |

See Also



[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).



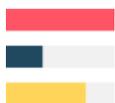
[Password Expiration Web Part](#)

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 using percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



[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 www.artfulbits.com/sharepoint for the latest product version.