



Cascaded Lookup 4.0

User Guide

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

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1. Product Introduction

SharePoint Cascaded Lookup greatly enhances default SharePoint lookup functions and further reduces wait times as lookup results are filtered according to parameters you set. Column relationships between parent and child columns can be established and 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 latest version of this installation guide or other user guides, please visit our document center:

<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, 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_V4_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.CascadedLookupSetup12.4.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2017 or WSS 3.0.
Solutions\ CascadedLookup\ BoostSolutions.CascadedLookupSetup14.4.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2010 or SharePoint Foundation 2010.

Solutions\ CascadedLookup\ BoostSolutions.CascadedLookupSetup15.4.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 supported Google Chrome supported

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

SharePoint 2007

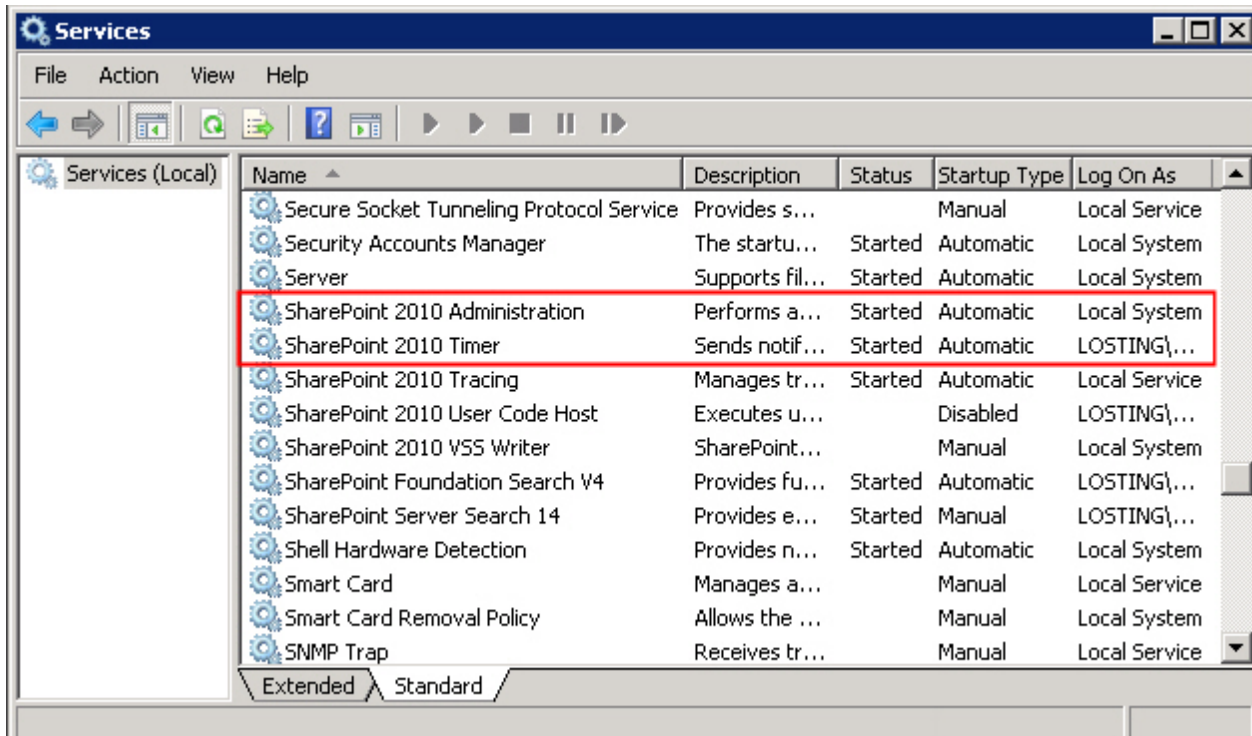
Operating System	Microsoft Windows Server 2003 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2008 R2
Server	Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 Microsoft .NET Framework 2.0 or 3.0 Note: This product is not compatible with SPS 2003 and WSS v2
Browser	Microsoft Internet Explorer 6 or greater

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.

- 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

- **SharePoint 2007**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN

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

```
stsadm -o addsolution -filename BoostSolutions.CascadedLookupSetup14.4.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

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

```
stsadm -o deploysolution -name BoostSolutions.CascadedLookupSetup14.4.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.CascadedLookupSetup14.4.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.CascadedLookupSetup14.4.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.CascadedLookupSetup14.4.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.CascadedLookupSetup14.4.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.

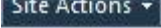
- c. Remove the solution from the SharePoint solutions storage:


```
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**.

Cascaded Lookup 4.2.510.0	
 <p>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)</p>	<div>Deactivate</div> <div>Active</div>

Activate Cascaded Lookup's features in Central Administration

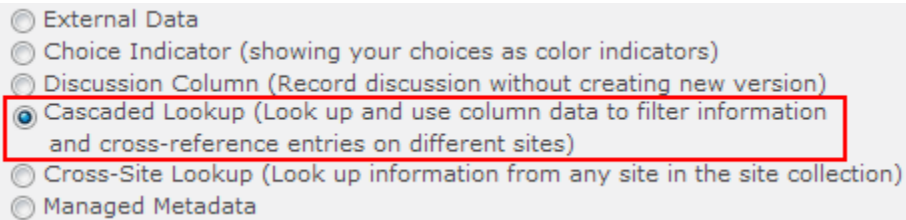
- a. Using the Quick Launch click **Application Management**.
- b. On the Application Management page, under Manage Applications, click **Manage Web applications**.
- c. Select a web application you want to configure and click **Manage Features** on the ribbon.
- d. Find Cascaded Lookup's features and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

Cascaded Lookup Data Adapter 4.2.510.0	
 <p>Provides the ability to manage Cascaded Lookup Column data in Microsoft Office applications like Excel, Access, Word and SharePoint Workspace. (Powered by BoostSolutions)</p>	<div>Deactivate</div> <div>Active</div>

3. Manage Cascaded Lookup Column

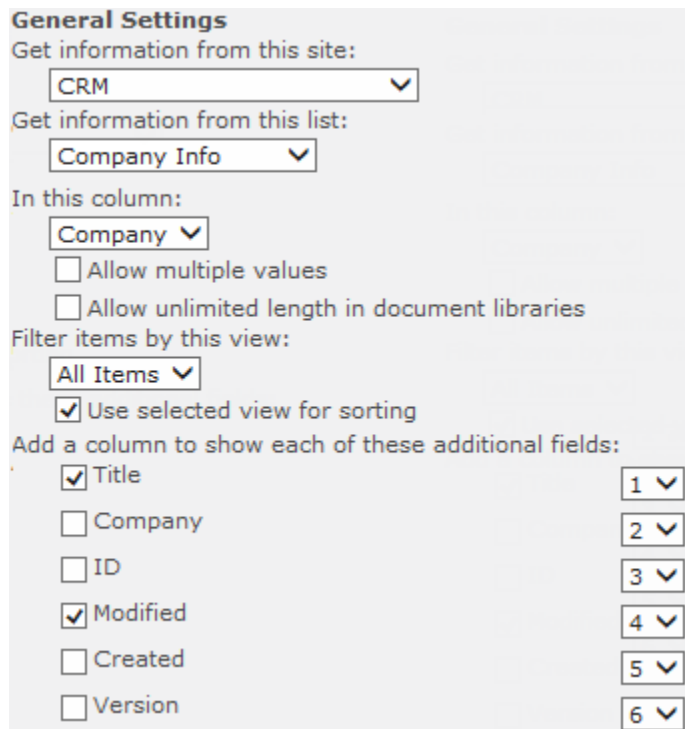
3.1 Settings for Cascaded Lookup

After you install Cascaded Lookup on the SharePoint server, a **Cascaded Lookup** column type will be available in the **Create Column** page.



3.1.1 General Settings

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

A screenshot of the 'General Settings' section for a Cascaded Lookup column. The settings are as follows:

- Get information from this site: CRM (selected in a dropdown)
- Get information from this list: Company Info (selected in a dropdown)
- In this column: Company (selected in a dropdown)
- ☐ Allow multiple values
- ☐ Allow unlimited length in document libraries
- Filter items by this view: All Items (selected in a dropdown)
- ☒ Use selected view for sorting
- Add a column to show each of these additional fields:
 - ☒ Title (1)
 - ☐ Company (2)
 - ☐ ID (3)
 - ☒ Modified (4)
 - ☐ Created (5)
 - ☐ Version (6)

- **Get information from this site**

This dropdown list shows all the sites in the current site collection. You need to specify the source site here; a source site is where the lookup list is located. The source site can be any site in the current site collection.

- **Get information from this list**

This dropdown list shows all the available lists in the site you selected. You need to specify the source list here. The source list is a list that Cascaded Lookup will use to refer to information.

- **In this column**

In this dropdown list, you will need to specify the source column. A source column contains data for your 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.

- **Filter items by view**

This dropdown list shows all available public views; items can be filtered by selecting views.

Once you select a view, you can only access and select the items in that view.

You can set the order of the columns values in the Cascaded Lookup dropdown list by selecting the **Use selected view for sorting** check box.

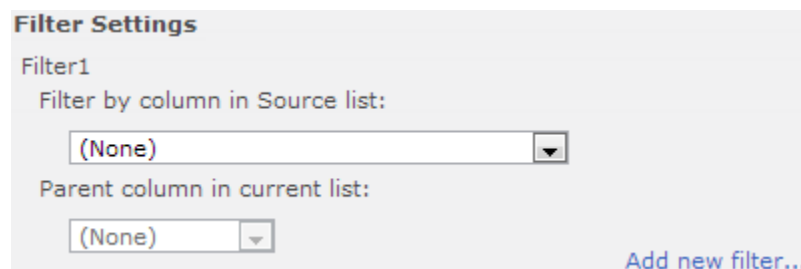
Note The order of the columns values will be same with the order of the items which you set in the view settings. By default it is organized by ID.

- **Additional fields**

This function allows you to add more columns to the lookup that will be displayed only in the list view page. You can specify the order of additional columns by selecting the number on the right side of the columns.

3.1.2 Filter Settings

Filter settings enables you to establish cascading behavior and helps you to reduce lookup information. You can define the following in this part:



The screenshot shows a 'Filter Settings' window. At the top, it says 'Filter1'. Below that, there are two dropdown menus. The first is labeled 'Filter by column in Source list:' and has '(None)' selected. The second is labeled 'Parent column in current list:' and also has '(None)' selected. At the bottom right, there is a link that says 'Add new filter...'.

- **Filter by column in Source list**

This column is located in the source lookup 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).

- **Parent column in Current 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.

3.1.3 Advanced Settings

Cascaded Lookup provides you the following three options in Advanced Settings to make your cascading more efficient.

Advanced Settings

☒ Enable creating new item in the source lookup list
 Text of creating new item link

☐ Show empty field when no items match filter criteria

☐ Display only one instance of duplicate items

- **Enable creating new item in the source lookup list**

When you select this checkbox you can add new items in the source lookup list. The following link will be added below the lookup field:

Country

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

- **Show empty field when no items match filter criteria**

Check this box to display an empty field when no items match the filter criteria.

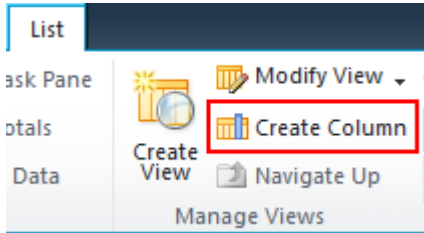
- **Display only one instance of duplicate items**

Check this box display one item when duplicate items exist.

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.

1. Enter the list or library that you want to create a Cascaded Lookup column for.
2. On the Ribbon, click the **List** or **Library** tab and then click **Create Column** in the Manage Views group.



3. A Create Column dialog box will open.
 - a. In the **Name and Type** section, enter a name for your Cascaded Lookup column in the Column name box.
 - b. Under **The type of information in this column is**, select Cascaded Lookup.

Column name:

Cascaded

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Choice Indicator (showing your choices as color indicators)
- ☐ Discussion Column (Record discussion without creating new version)
- ☒ Cascaded Lookup (Look up and use column data to filter information and cross-reference)
- ☐ Cross-Site Lookup (Look up information from any site in the site collection)

- c. In the General Settings section, you need to specify the source information for your lookup column. You can also select **Allow multiple values** if you need to enable multiple values in

your lookup column. You can opt to enable the **Filter by view** function and select additional fields.

General Settings

Get information from this site:

Get information from this list:

In this column:

☐ Allow multiple values
☐ Allow unlimited length in document libraries

Filter items by this view:

☒ Use selected view for sorting

Add a column to show each of these additional fields:

<input checked="" type="checkbox"/> Title	<input type="text" value="1"/>
<input type="checkbox"/> Company	<input type="text" value="2"/>
<input type="checkbox"/> ID	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Modified	<input type="text" value="4"/>
<input type="checkbox"/> Created	<input type="text" value="5"/>
<input type="checkbox"/> Version	<input type="text" value="6"/>

- d. In the Filter Settings section, specify the Filter column and the Parent column. You can add multiple filters by clicking **Add new filter...**

Filter Settings

Filter1

Filter by column in Source list:

Parent column in current list:

[Add new filter...](#)

- e. In the Advanced Settings section, select the function you want.

Advanced Settings

☒ Enable creating new item in the source lookup list
 Text of creating new item link

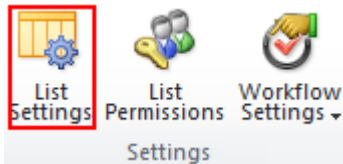
☐ Show empty field when no items match filter criteria
☐ Display only one instance of duplicate items

4. Click **OK**.

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, source site or the source list.

1. Enter the list or library that contains the Cascaded Lookup column you want to edit.
2. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.



3. 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:

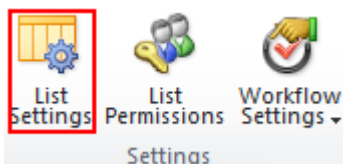
Column (click to edit)	Type
Title	Single line of text
Cross-Site Lookup column	Cross-Site Lookup
Cascaded Lookup column	Cascaded Lookup
Created By	Person or Group

4. 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.

1. Enter the list or library that contains the Cascaded Lookup column you want to edit.
2. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.



- 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

- Scroll to the bottom of the **Change Column** page and then click **Delete**.
- 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 a Lookup Column to Cascaded Lookup Column

This function helps you to convert a lookup column (SharePoint lookup or Cross-site lookup) to a Cascaded Lookup column.

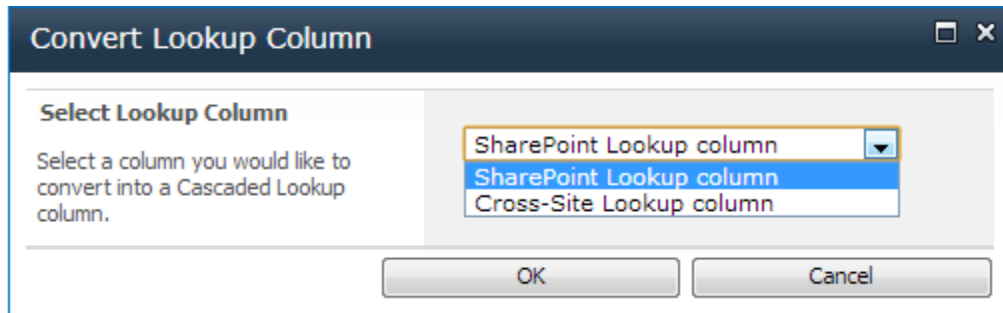
- Open the **Create Column** page and select Cascaded Lookup in the Name and type section.
- Configure the General Settings, Filter Settings and Advanced Settings as per your needs.
- Click **Click here to convert a Lookup column in this list into a Cascaded Lookup column**.

Convert:

[Click here to convert a Lookup column in this list into a Cascaded Lookup column](#)

Note This link will not appear if there is no Cross-Site Lookup or SharePoint Lookup column in the current list.

- A **Convert Lookup Column** dialog box will appear. In the select lookup column dropdown list you will find all the Cross-Site lookup and SharePoint lookup columns.

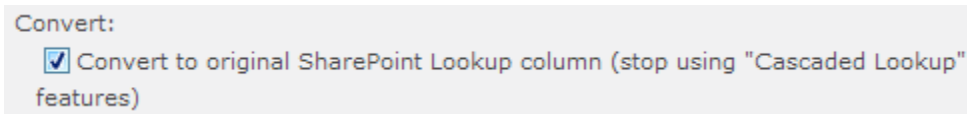


5. Choose a lookup column you want to convert into a Cascaded Lookup column and click **OK**. You will return to the **Change Column** page. The column has already been converted into a SharePoint Lookup column or Cross-Site Lookup column.
6. Click **OK** to save the column settings.

3.5.2 Convert to a SharePoint Lookup Column

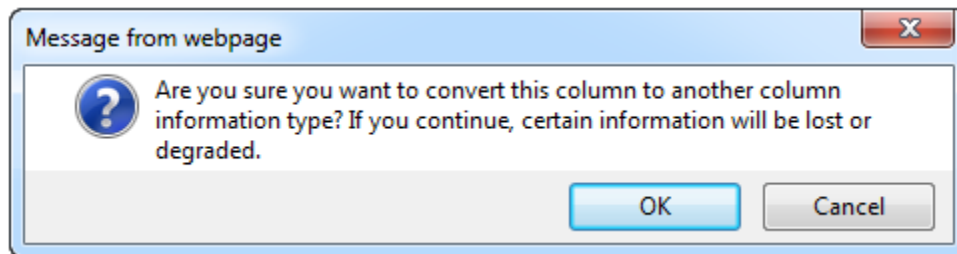
This function helps you to convert a Cascaded Lookup column into an original SharePoint Lookup column.

1. First select the Cascaded Lookup column you want to convert into an original SharePoint Lookup column and then enter the **Change Column** page.
2. Tick the checkbox next to **Convert to original SharePoint Lookup column (stop using "Cascaded Lookup" features)**.



Note This function is not available in the trial version.

3. A dialog box will appear as follows:



4. Click **OK**. You will return to the **Change Column** page. The Cascaded Lookup column has already been converted into an original SharePoint lookup column.
5. Click **OK** to save the column settings.

4. Using the Cascaded Lookup Column

Cascaded Lookup allows you to create relationships using single-select lookup field or multiple-select lookup field, vary according to your business needs.

4.1 Create a Relationship Using 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 source list.

Account - Lists all the customers' information; this list is the Target list. 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 'Account - New Item' form with the following fields and values:

- Title *: 1
- Account Name: Rachel Green
- Phone Number: 212-460-3699
- Email: rachel@BoostSolutions.com
- Region: North America (dropdown menu)
- Country: America (dropdown menu)
- City/State: New York (dropdown menu)
- Company: BoostSolutions

Annotations in the image:

- A red box highlights the 'Region', 'Country', and 'City/State' fields, with a red arrow pointing to the 'Country' field.
- A red box highlights the 'Country' and 'City/State' fields, with a red arrow pointing to the 'City/State' field.
- A red box highlights the 'City/State' field.
- A red box highlights the 'Country' field, with a red arrow pointing to the 'City/State' field.
- A red box highlights the 'City/State' field, with a red arrow pointing to the 'Country' field.

Buttons at the bottom: Save, Cancel.

- **Region**

This column is connected to the "Regions" column in the Customer Locations list. There is no filter in this column settings.

General Settings	Filter Settings
Get information from this site: CRM	Filter1
Get information from this list: Customer Locations	Filter by column in Source list: (None) ▼
In this column: Region ▼	Parent column in current list: (None) ▼

- **Country**

This column is connected to the "Countries" column in the Customer Locations list. It is filtered by the selected Region.

General Settings	Filter Settings
Get information from this site: CRM	Filter1
Get information from this list: Customer Locations	Filter by column in Source list: Region ▼
In this column: Country ▼	Parent column in current list: Region ▼

- **City/State**

This column is connected to the "City" column in the Customer Locations list. It is filtered by the selected Country.

General Settings	Filter Settings
Get information from this site: CRM	Filter1
Get information from this list: Customer Locations	Filter by column in Source list: Country ▼
In this column: City/State ▼	Parent column in current list: Country ▼

4.2 Create a Relationship Using 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 Info – List of all partner companies and their relevant information (Companies, Industry, Size, and Location); this is the source list.

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

The following shows the Cascaded lookup column:

Order ID *

Company

Filter items by Location: Japan

Filter items by Industry: Hardware

Filter items by Company Size: 10000+

Kanon
Hitachi

Add >

< Remove

Create new item...

Price

Save Cancel

Company column is filtered by 3 columns (Location, Industry, and Company Size) in the Source list.

We set up the **Company** column settings as follows:

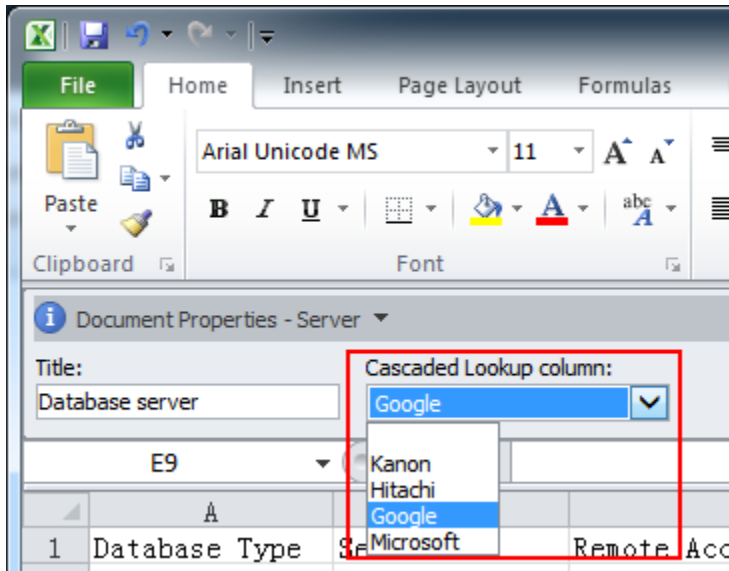
General Settings	Filter Settings
Get information from this site: CRM	Filter1
Get information from this list: Company Info	Filter by column in Source list: Location
In this column: Company	Parent column in current list: (None)
<input checked="" type="checkbox"/> Allow multiple values	Filter2
Filter items by this view: (None)	Filter by column in Source list: Industry
<input type="checkbox"/> Use selected view for sorting	Parent column in current list: (None)
Add a column to show each of these additional fields:	Filter3
<input type="checkbox"/> Title	Filter by column in Source list: Company Size
<input type="checkbox"/> Company	Parent column in current list: (None)
<input type="checkbox"/> ID	
<input type="checkbox"/> Modified	
<input type="checkbox"/> Created	
<input type="checkbox"/> Version	

5. Manage Column Data with Microsoft Office Applications

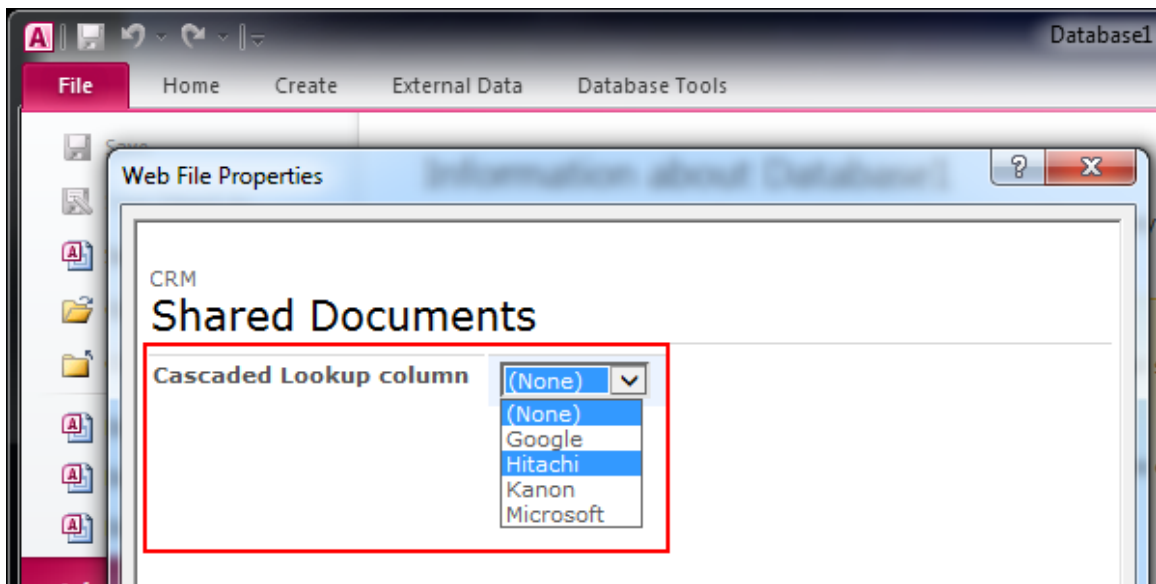
By default, SharePoint can only manage column data in Microsoft Office applications. Cascaded Lookup 4.0 provides a new **Data Adapter** Web Application feature that enhances the functionality of SharePoint with the ability to manage Cascaded Lookup columns in **Microsoft Excel**, **Microsoft Access**,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

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

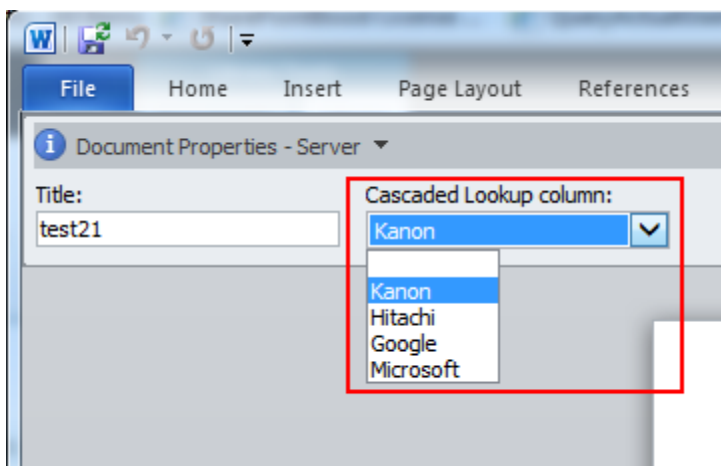
- **Microsoft Excel**



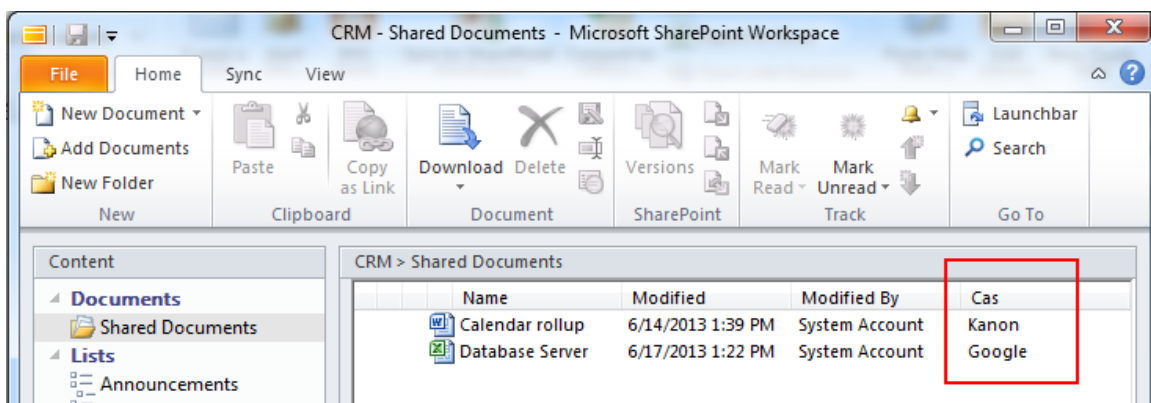
- **Microsoft Access**



- **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, 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

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Live chat:

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

Appendix 1: Glossary

Source List – a list where Cascaded Lookup will refer to for information. The Source List can be in any site in the current site collection.

Source Column – a column located in the Source List. It contains data for your drop down menu.

Filter Column - located in the Source List, it is used to filter out irrelevant data from the Source Column and is also available as a drop down menu.

Parent Column - located in the Target 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

- In the products main page, click the trial link and enter the **License Management Center**.
- 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>

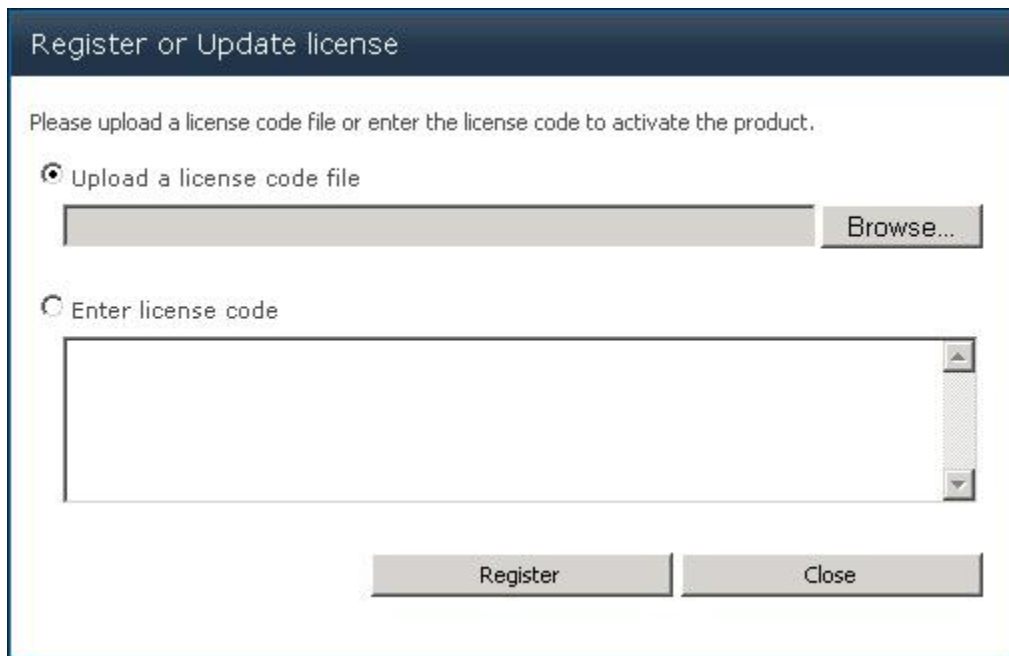
Download Close

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.

- Send the above information to us (sales@boostsolutions.com) to generate a license code.

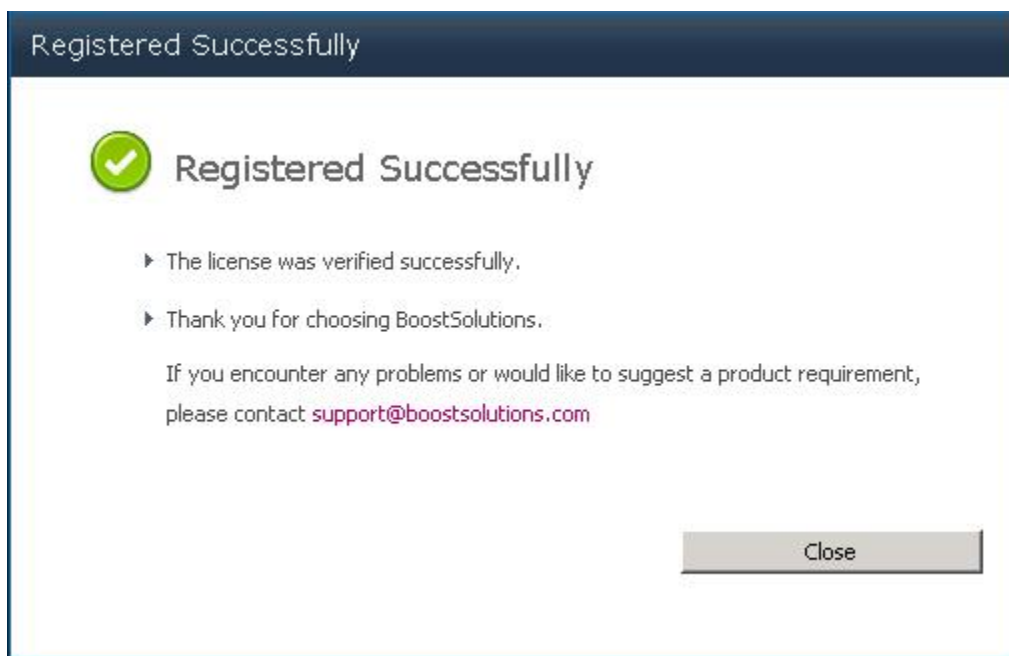
License Registration

- 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". At the bottom right, there is a "Close" button.

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