

# **SharePoint Cascaded Lookup Installation Instruction**

## **System Requirements**

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

## **License Management**

Click the link in Create Column page to visit Cascaded Lookup license management page.

## Create Column: BugList

Use this page to add a column to this list.

### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

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)
- Discussion Column(recording discussion without creating new version)
- Discussion Field
- Cascaded Lookup (Information from all sites in the site collection)
- Cross-Site Lookup (Information from all sites in the site collection)
- ProjectReferenceNumber(only 3 characters)
- Business data

### Additional Column Settings

Specify detailed options for the type of information you selected.

You are using a trial license for SharePoint Cascaded Lookup (30 days left), please click here to manage license

Description:

Require that this column contains information:

- Yes  No

Get information in this site:

Get information from:

In this column:

- Allow multiple values

Filter column(from look-up list):

Parent column(from this list):

Convert:

- Convert to SharePoint Lookup type

# SharePoint Cascaded Lookup License Management

License information and add new license

<b>SharePoint Cascaded Lookup</b> Cascaded lookup information from other site, filtered by other column	License Information	
	Farm ID:	{1c64b1bc-e9a4-44b4-a0a3-6924200f8d44}
	Site Collection ID:	ca135bdc-350c-4db7-89b3-88e36f29d1cd
	Current amount of users in this site collection:	8
	License status:	No Registration
	Add license(ASCII):	<a href="#">Click here to get license</a>

OK

After payment, send site collection ID to sales@sharepointboost.com to generate license code.

Enter the license code and click "OK".

# SharePoint Cascaded Lookup License Management

License information and add new license

<b>SharePoint Cascaded Lookup</b> Cascaded lookup information from other site, filtered by other column	License Information	
	Farm ID:	{1c64b1bc-e9a4-44b4-a0a3-6924200f8d44}
	Site Collection ID:	ca135bdc-350c-4db7-89b3-88e36f29d1cd
	Current amount of users in this site collection:	8
	License status:	50
	Add license(ASCII):	<a href="#">Click here to get license</a>

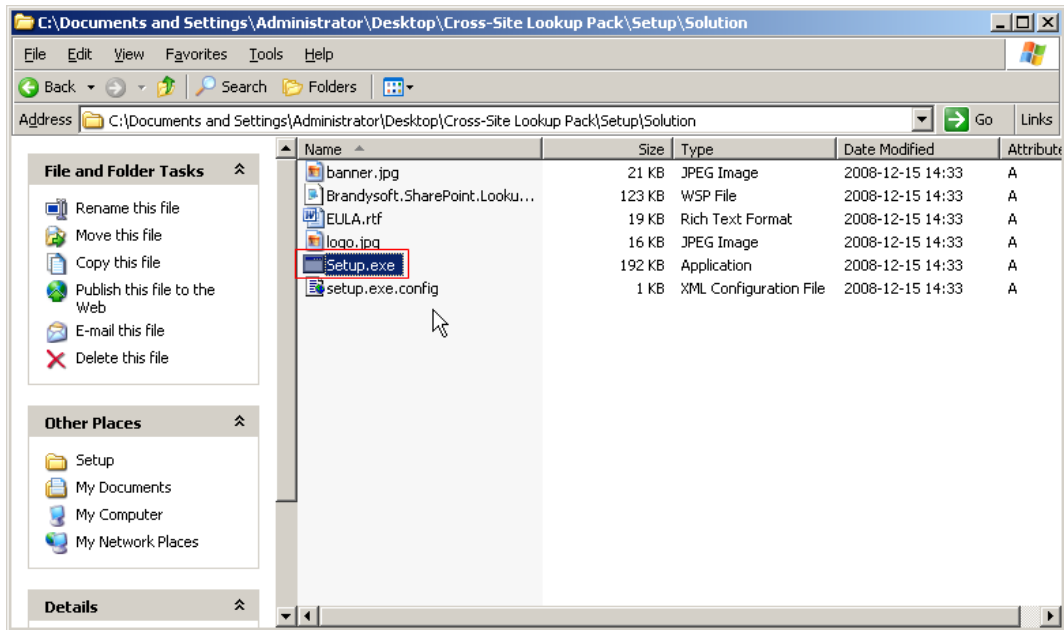
3b117a51-c840-46f5-ab0c-3247c2682e7ceAZAw0dPbjm1Kt+Z4dKM9C2ZjvlpF575kSRJNVibnI7rTVSkNPwRx4hQ+pIEB0IYcvbwoAwxzImnVVEu aRiMZxvvtMuLQcimAIutwvZgUuj3ud947ihDhXfVg2IsGZ1bS35JdKG+A/BIR+Zi/Hho/e1ECVfYBTYYonVuiDeyl3o=gZq Wc8QAZdKsCF5yT95JU4xTitCGsASC49en23eOx1eqIavstw8TenxIKg4vDEKv4RP1xDtprkRyQZ7c9mEmJ0wmRa9UI Wqldknpgy8bkt17rn4FpPPOfqsV7qjH/ramzWbuhjwg7UFF1w6hY+jPZDbtCSeemIGfk/v+XKmbzvgTt9s7Q4jhC7uzxj5 +BohiutoAqwRraeg/s0LM1EG9lfil3p9HKWhMIzMP9kiHjoEZ1z/QBEg8CLTgjFmpPxZPcnZFYy+bJRMplOe86ELSGh57w3z t1p0v8fBNgH9CSBQMR3mDWzFOc2AtiFw22tEOhkoqr721bVHZ79BkjcMvSrnrtTjCLR/6PCK3JRf86j0Dh/X+Na7NjFz+Z oQMSdouO01fP2nUij5PM1Gqb13XnY9T611Jo8ouO01fP2nUjTEPNDcNqqnmNuxK3aZTd6+gmE6wMI3KxIDv7RPG0E1h6 Yf/qIdS3dx/Kf8d+8nVINR1o/KEN/RIMX0/Am0yTCz1TC8F+71C2JgPtGIF32WFuxHnhr/orR3C83JqMAiweTSp10Cyutamt USvVlK9rYU6+EdwthYIsHD9bqKA8eKqsTgbMibNSGG5QJX5+98XoWRRowILdpXXrmXNxxiEm5mF5YFBeyR5uhgw59Ut5

You license has been validated, Please switch to previous page and Refresh(F5) it

OK

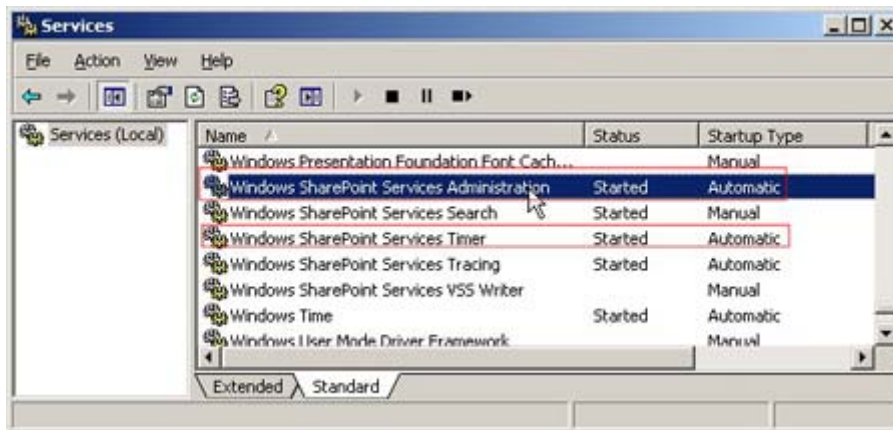
## Install

Download SharePoint Cross-Site Lookup Pack install file from SharePointBoost website, release the file, and run "setup.exe".

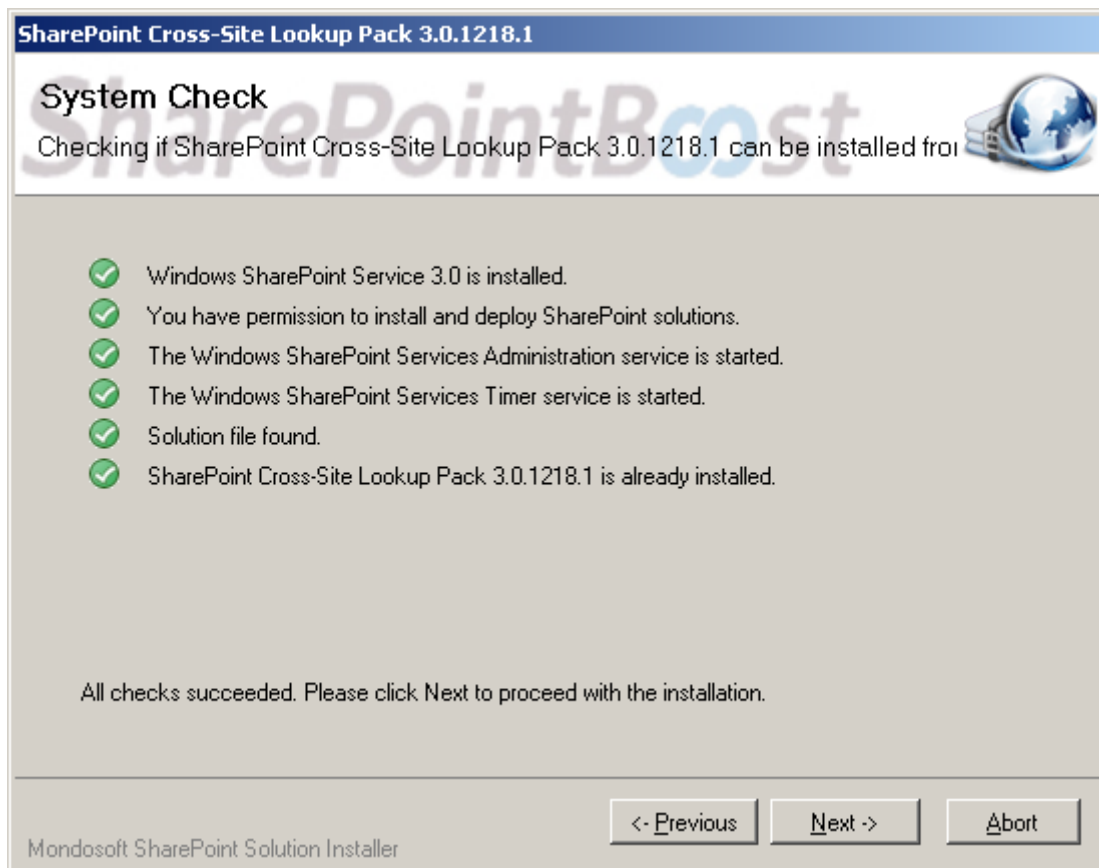


**Note:**

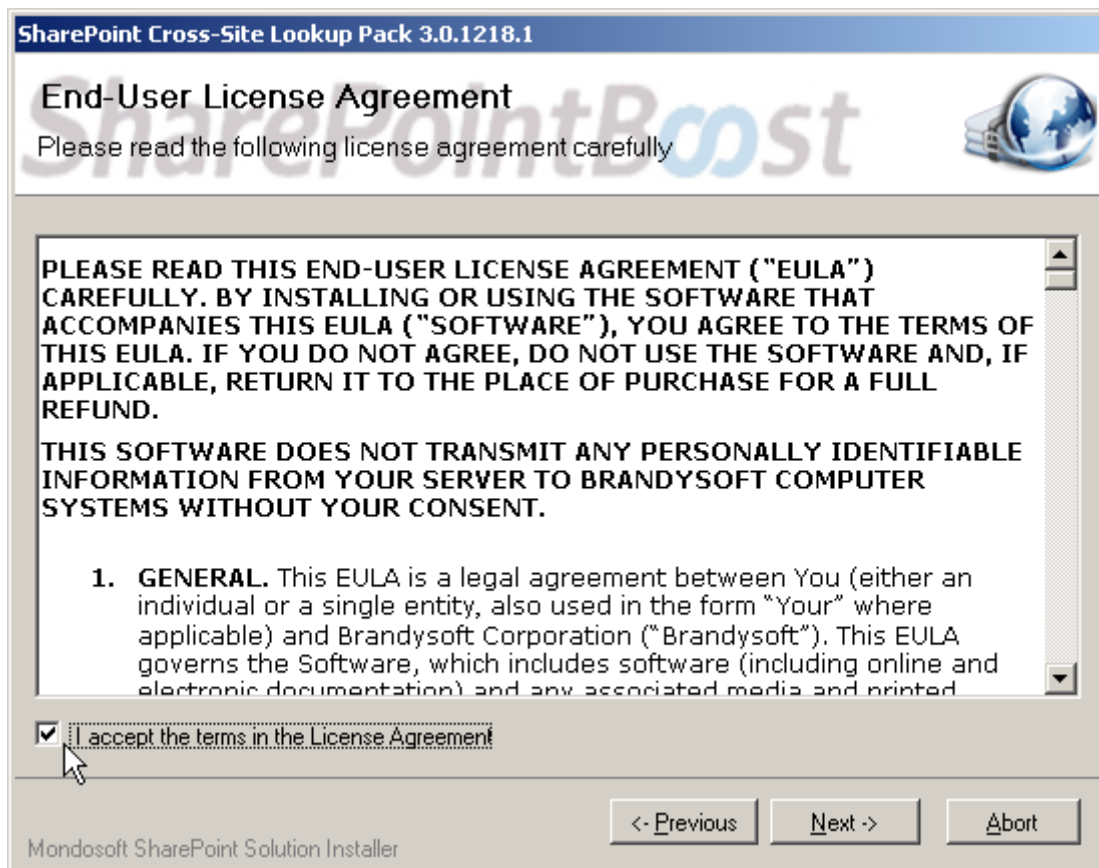
You must be the SharePoint Farm Administrator.



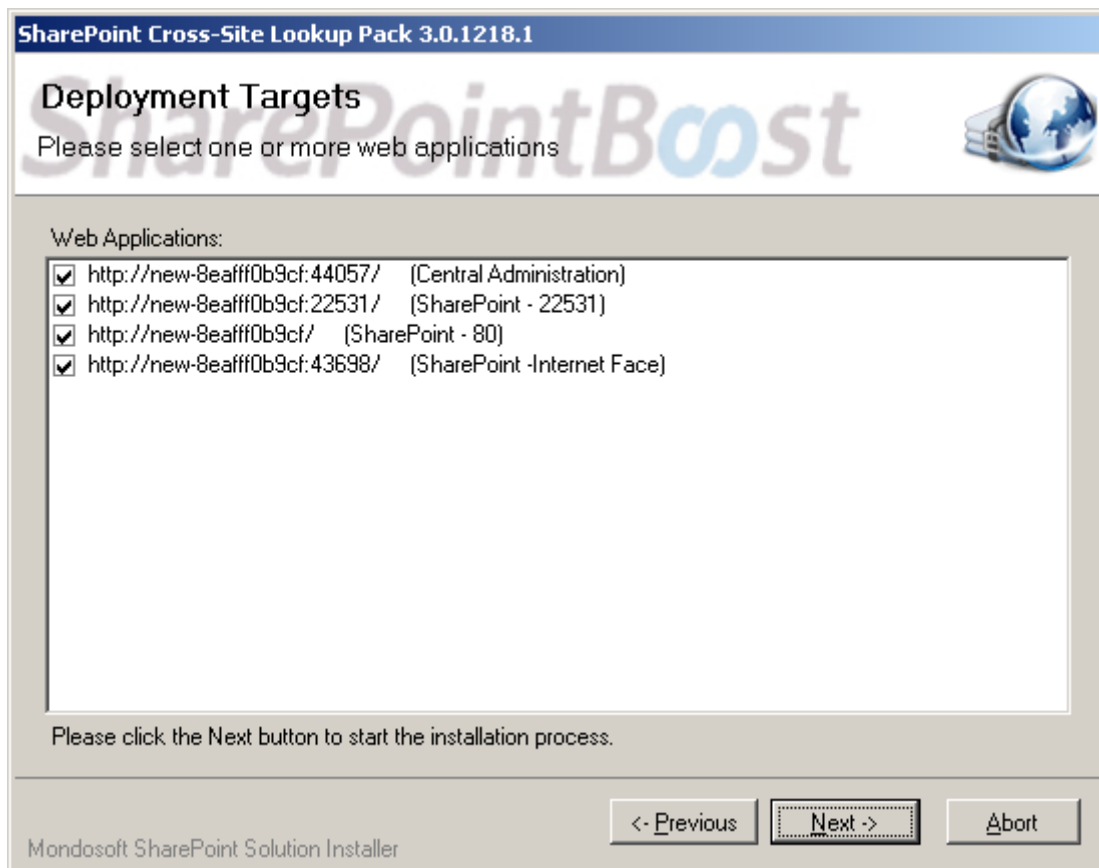
After system check is finished, click "Next".



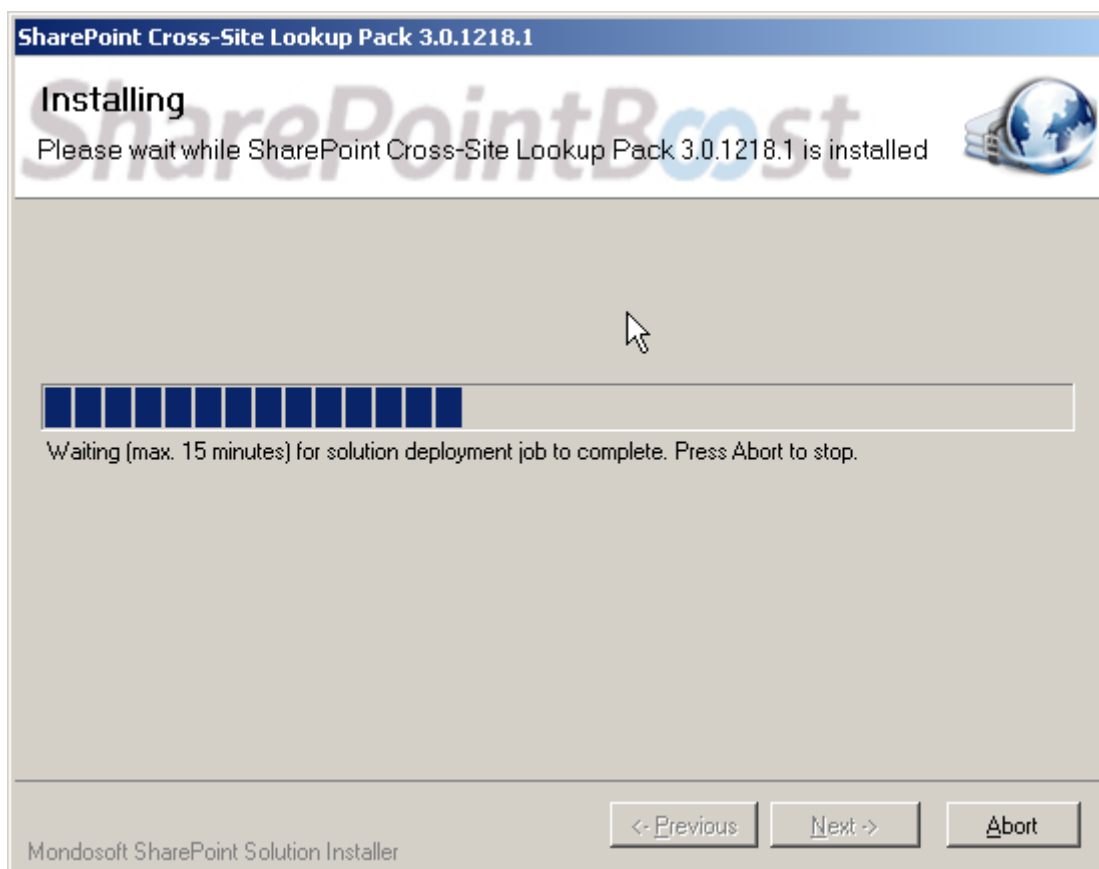
After reading License Agreement, click “accept” and go to next step.

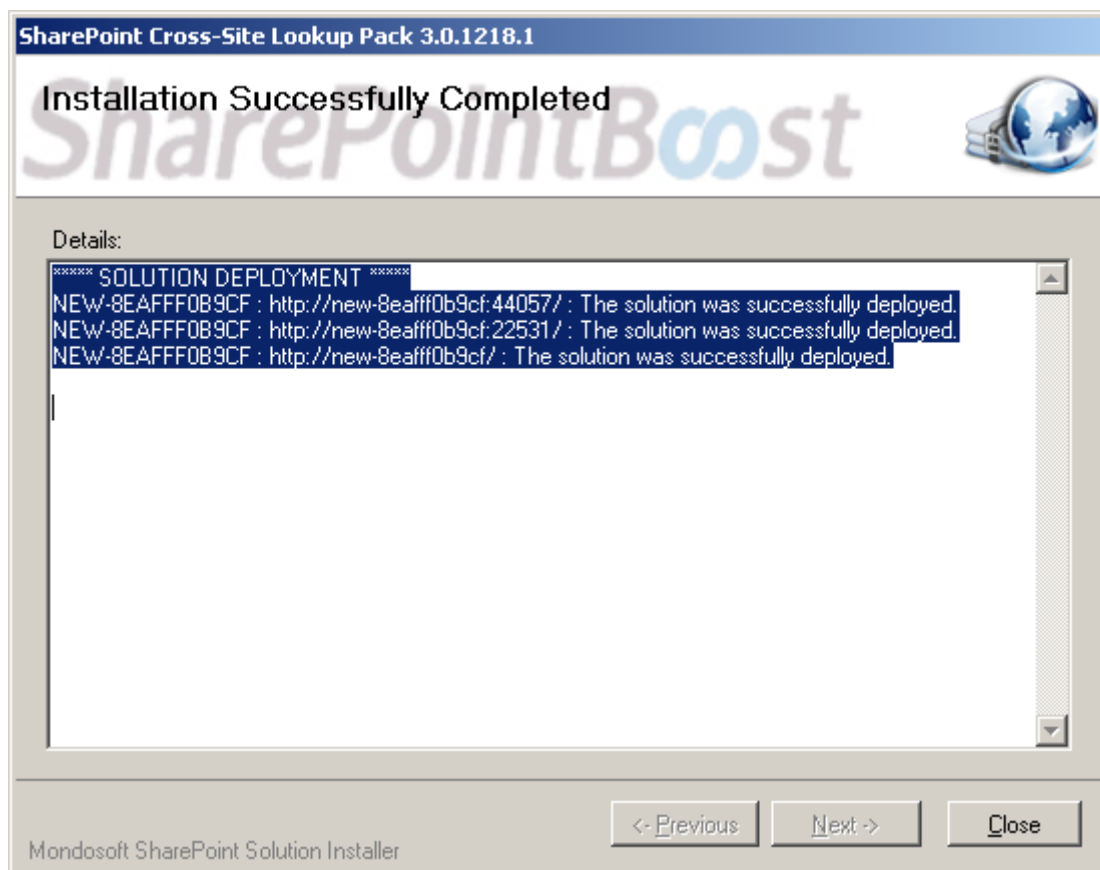


Select one or more web applications and click “Next”.

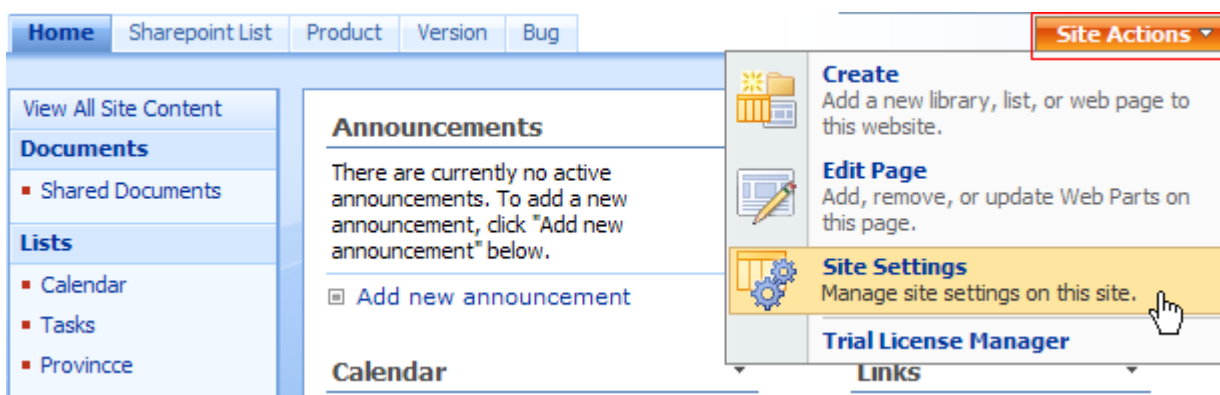


Wait for installing, click “Next” for more deployment details.





Click "Site Actions" menu in the root site of one site collection, then click "Site Settings".



Click "Site collection features" link in Site Settings page.




# Site Settings

## Site Information

Site URL: <http://new-8eaaff0b9cf:22531/sites/Sharepoint/>  
Mobile Site URL: <http://new-8eaaff0b9cf:22531/sites/Sharepoint/m/>  
Version: 12.0.0.6219

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none"><li>People and groups</li><li>Site collection administrators</li><li>Advanced permissions</li></ul>	<ul style="list-style-type: none"><li>Title, description, and icon</li><li>Tree view</li><li>Site theme</li><li>Top link bar</li><li>Quick Launch</li><li>Save site as template</li><li>Reset to site</li></ul>	<ul style="list-style-type: none"><li>Master pages</li><li>Site content types</li><li>Site columns</li><li>Site templates</li><li>List templates</li><li>Web Parts</li><li>Workflows</li></ul>	<ul style="list-style-type: none"><li>Regional settings</li><li>Site libraries and lists</li><li>Site usage reports</li><li>User alerts</li><li>RSS</li><li>Search visibility</li><li>Sites and workspaces</li></ul>	<ul style="list-style-type: none"><li>Search settings</li><li>Search scopes</li><li>Search keywords</li><li>Recycle bin</li><li>Site directory settings</li><li>Site collection usage reports</li><li><b>Site collection features</b></li><li>Site hierarchy</li><li>Portal site connection</li></ul>

In SharePoint Site collection feature list, activate SharePoint Cascaded Lookup.

	<b>SharePoint Alert Reminder Boost</b> Send alert and reminder email according to custom conditions.	Activate	
	<b>SharePoint Cascaded Lookup</b> Cascaded lookup information from other site, filtered by other column	Deactivate	<b>Active</b>
	<b>SharePoint Column/View Permission</b> Assign read or write permissions to columns or views	Deactivate	<b>Active</b>

(Cascaded\_feature\_active.JPG)SharePoint Cascaded Lookup feature active

After installation, you can find Cascaded Lookup Column in Create Column page.





### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

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)
- Discussion Column (recording discussion without creating new version)
- Discussion Field
- Cascaded Lookup (Information from all sites in the site collection)
- Cross-Site Lookup (Information from all sites in the site collection)
- ProjectReferenceNumber (only 3 characters)
- Business data

### Additional Column Settings

Specify detailed options for the type of information you selected.

You are using a trial license for SharePoint Cascaded Lookup (30 days left), please click [here](#) to manage license

Description:

Require that this column contains information:

- Yes  No

Get information in this site:

Get information from:

In this column:

- Allow multiple values

Filter column (from look-up list):

Parent column (from this list):

Convert:

- Convert to SharePoint Lookup type

[Convert to Cascaded Lookup from...](#)

- Add to default view

There are two ways to create a cascaded Lookup column. One is creating a new Cascaded Lookup Column directly, the other is clicking the “Convert to Cascaded Lookup from...” link to enter

“Convert to Cascaded Lookup” page, and then converting a SharePoint Lookup type to Cascaded Lookup type.

Product Version **Bug** Site Actions ▾

## Convert to Cascaded Lookup

Please select lookup column to convert it to Cascaded Lookup

**Convert to Cascaded Lookup from** Cross-Site ▾

Please select lookup column in the right drop-down list to convert it to Cascaded Lookup

OK Cancel

### Uninstall

Run “setup.exe” again. (If your install file has been deleted, you can download it from <http://www.sharepointboost.com>). In the Repair and Remove page, select the Remove radio button and click “Next”, the Column Permission Boost will be uninstalled.

SharePoint Cross-Site Lookup Pack 3.0.1218.1

## Repair or Remove

Please select the operation you wish to perform

SharePoint Cross-Site Lookup Pack 3.0.1218.1 is already installed. What would you like to do?

**Repair**  
Retracts the solution from all web applications and deploys it once again.

**Remove**  
Retracts the solution from all web applications and deletes it from the SharePoint solution store.

< Previous Next > Abort

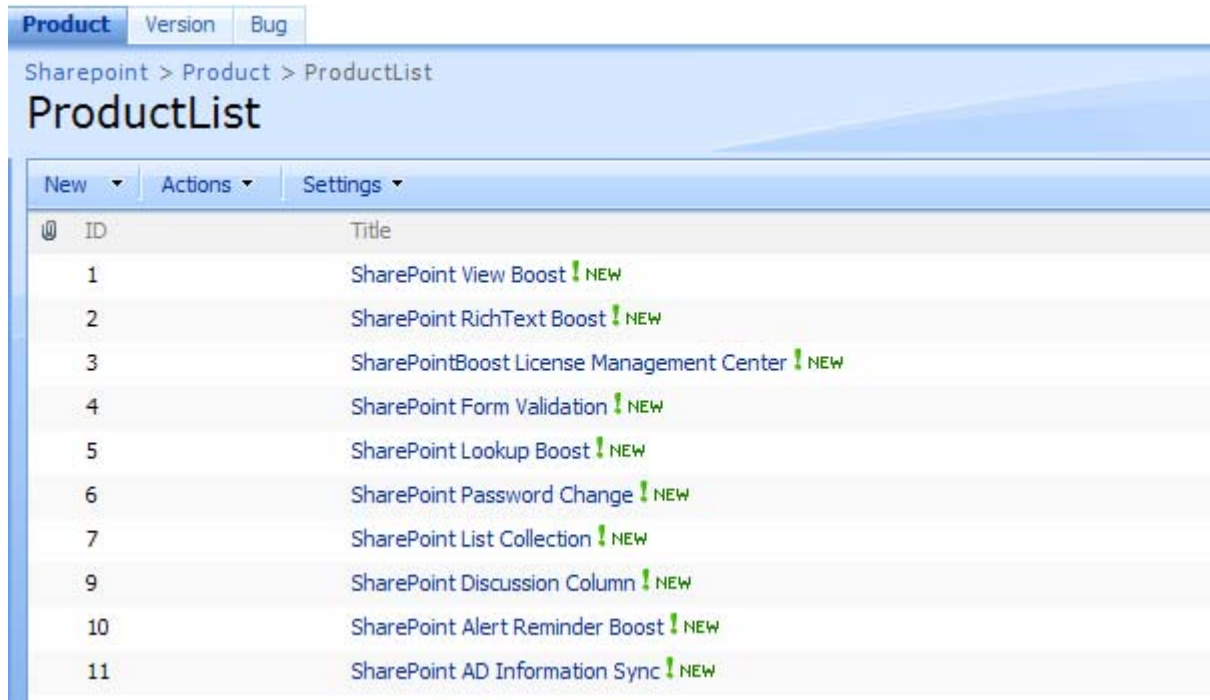
Mondosoft SharePoint Solution Installer

# SharePoint Cascaded Lookup Tutorial

The following is a typical example of how to use SharePoint Cascaded Lookup.

## Firstly, cross-site Lookup function

Two lists have been built in two sites respectively. One is "ProductList" in Product Site, and the other is "VersionList" in Version Site.



The screenshot shows the SharePoint interface for the 'ProductList' list in the 'Product' site. The breadcrumb path is 'Sharepoint > Product > ProductList'. The list contains 11 items, each with an ID and a title. Each title is followed by a green exclamation mark and the word 'NEW'.

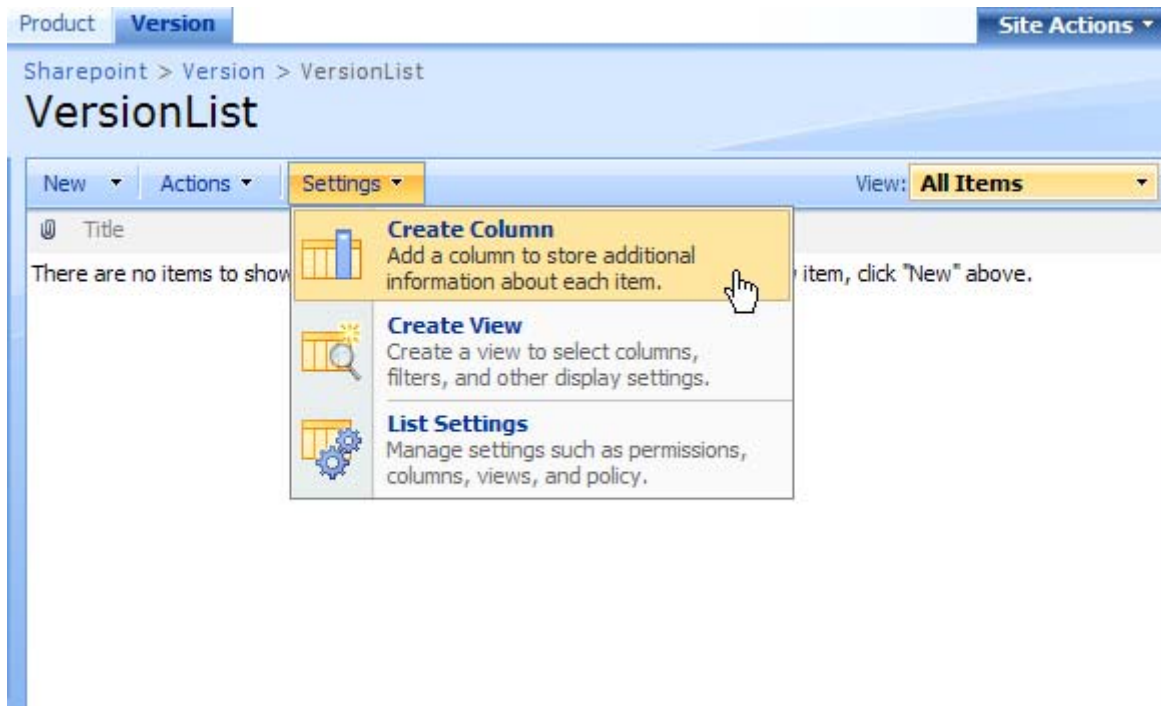
ID	Title
1	SharePoint View Boost ! NEW
2	SharePoint RichText Boost ! NEW
3	SharePointBoost License Management Center ! NEW
4	SharePoint Form Validation ! NEW
5	SharePoint Lookup Boost ! NEW
6	SharePoint Password Change ! NEW
7	SharePoint List Collection ! NEW
9	SharePoint Discussion Column ! NEW
10	SharePoint Alert Reminder Boost ! NEW
11	SharePoint AD Information Sync ! NEW



The screenshot shows the SharePoint interface for the 'VersionList' list in the 'Version' site. The breadcrumb path is 'Sharepoint > Version > VersionList'. The list is currently empty, displaying a message: 'There are no items to show in this view of the "VersionList" list. To create a new item, click "New" above.' The view is set to 'All Items'.

Title
There are no items to show in this view of the "VersionList" list. To create a new item, click "New" above.

Create a new column in VersionList.



On "Create Column" page, choose "Cascaded Lookup" column type and get information from ProductList in the Product Site:

### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

ProductName

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)
- Discussion Column(recording discussion without creating new version)
- Discussion Field
- Cascaded Lookup (Information from all sites in the site collection)
- Cross-Site Lookup (Information from all sites in the site collection)
- ProjectReferenceNumber(only 3 characters)
- Business data

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes  No

Get information in this site:

Product

Get information from:

ProductList

In this column:

Title

- Allow multiple values

Filter column(from look-up list):

(None)

Parent column(from this list):

(None)

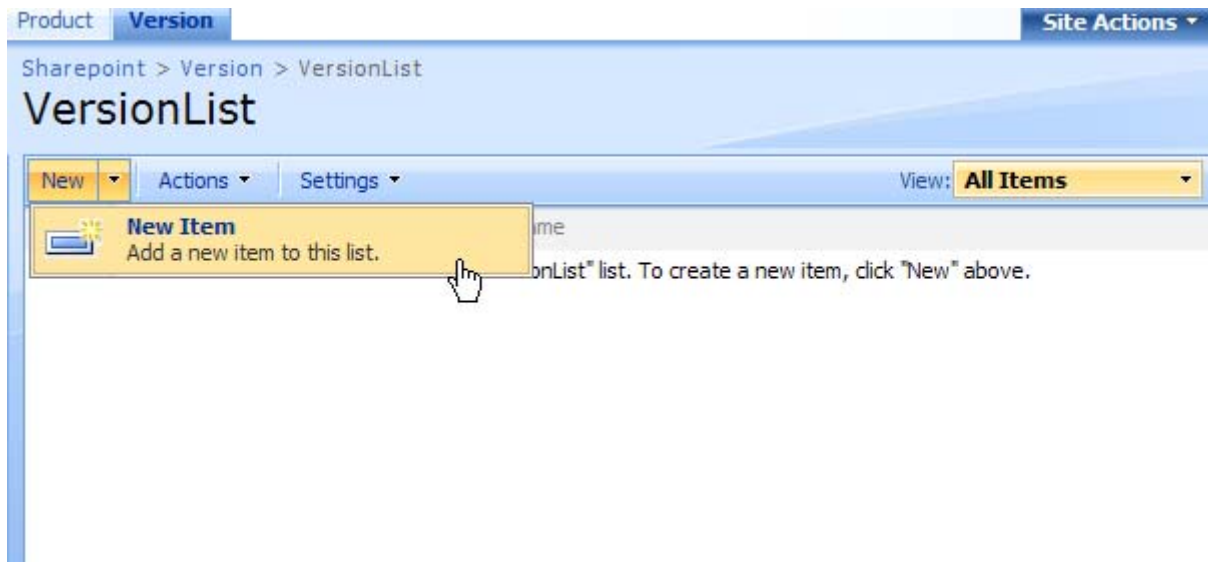
Convert:

- Convert to SharePoint Lookup type

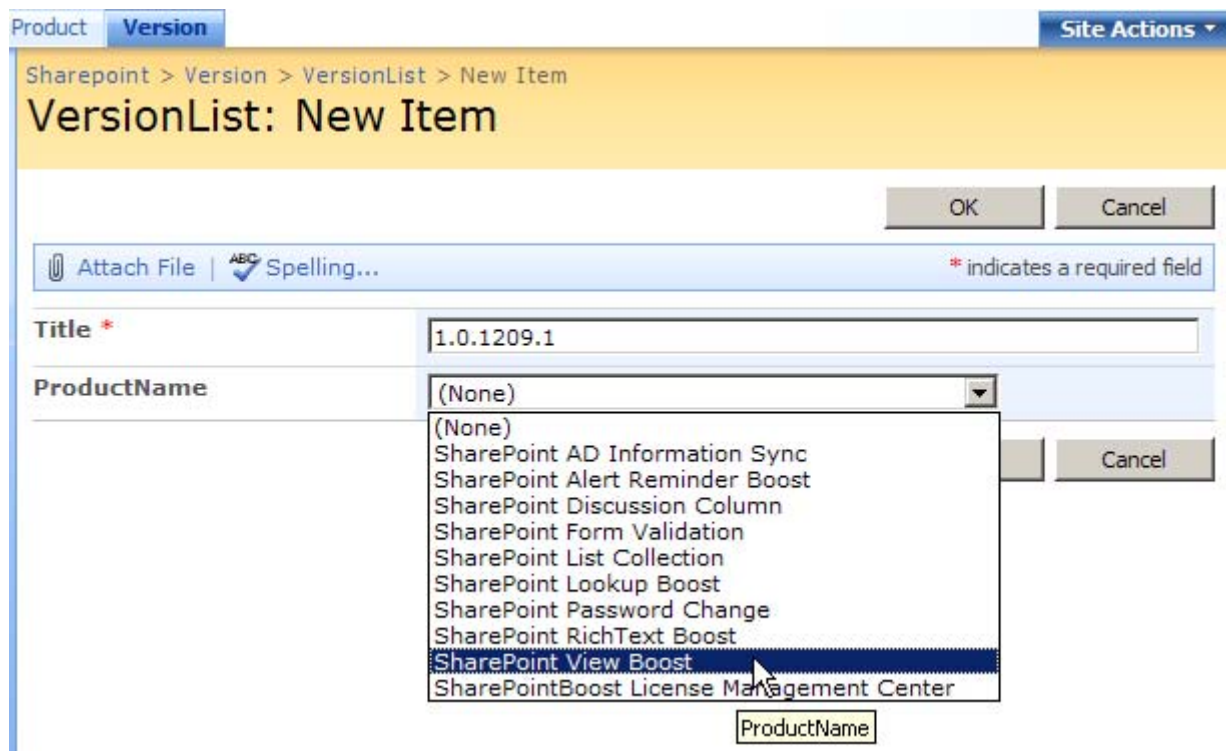
[Convert to Cascaded Lookup from...](#)

- Add to default view

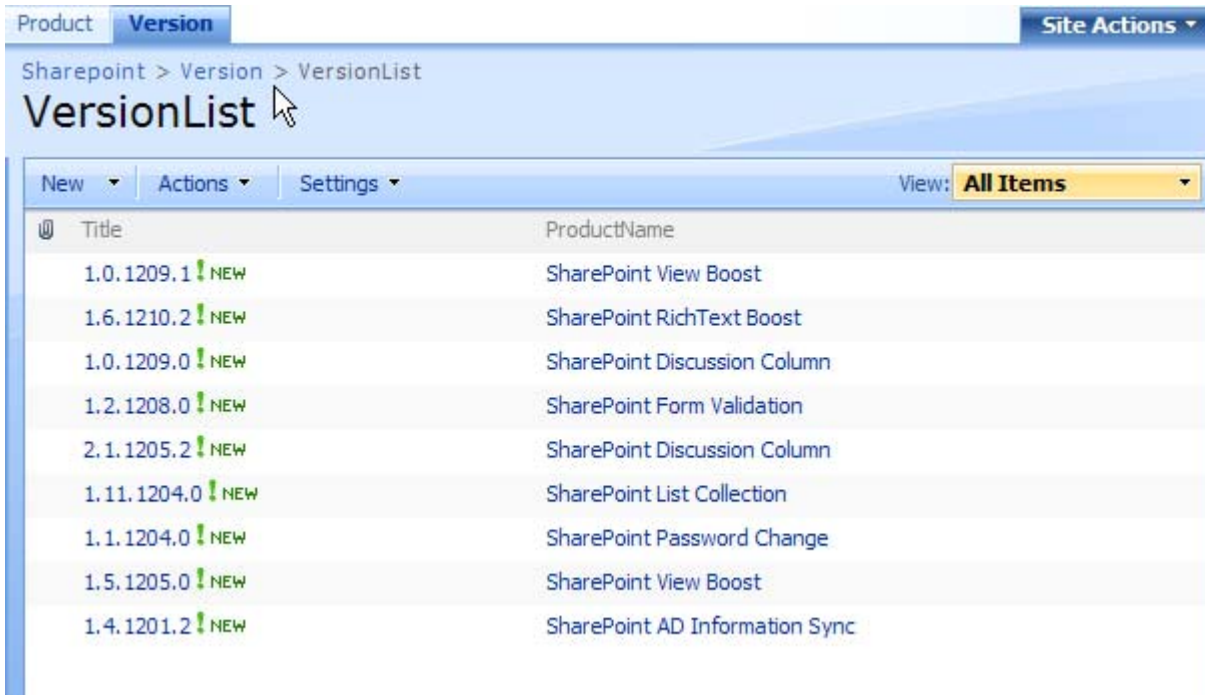
Create a new item in "VersionList" and select "ProductName" for the item.



(此图添加) (Create\_item\_in\_VersionList.JPG) Create a new item in VersionList list

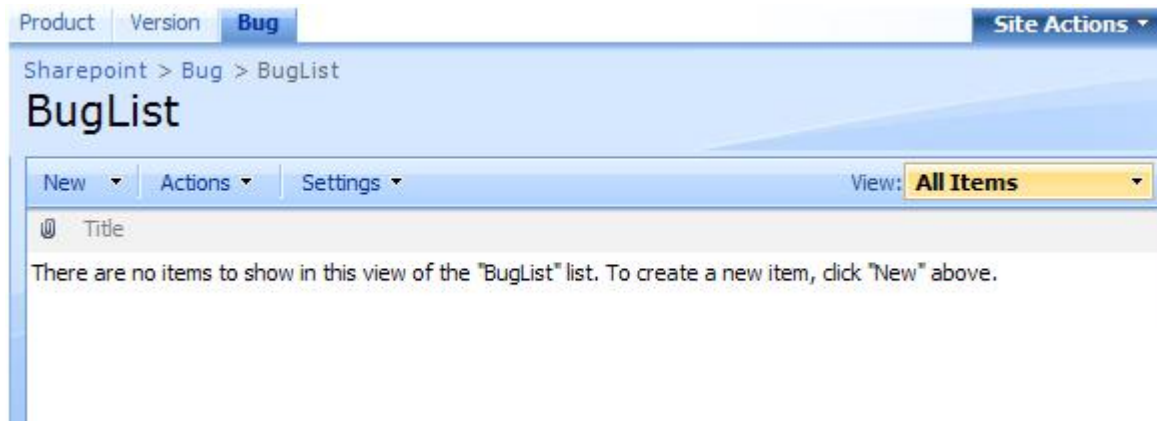


You can create items in VersionList and select "ProductName".



### Secondly, filter column function

Create a new site named “Bug”, and create a new List named “BugList”.



In “BugList”, create two new Cascaded Lookup columns, “PName” and “PVersion” in the same way. “PName” column looks up information from ProductList in Product site, and “PVersion” column looks up from VersionList in Version site.

Columns	
A column stores information about each item in the list. The following columns are currently available in this list:	
Column (click to edit)	Type
Title	Single line of text
PName	Cascaded Lookup
<b>PVersion</b>	Cascaded Lookup
Created By	Person or Group
Modified By	Person or Group

Edit the column “PVersion”, and choose “ProductName” as the Filter column, which gets information from ProductVersion list.

Sharepoint > Bug > BugList > Settings > Edit Column

## Change Column: BugList

Use this page to edit a column of this list.

<b>Name and Type</b> Type a name for this column.	Column name: <input type="text" value="PVersion"/> The type of information in this column is: Cascaded Lookup
<b>Additional Column Settings</b> Specify detailed options for the type of information you selected.	Description: <input type="text"/> Require that this column contains information: <input type="radio"/> Yes <input checked="" type="radio"/> No Get information in this site: Version Get information from: VersionList In this column: <input type="text" value="Title"/> <input type="checkbox"/> Allow multiple values Filter column(from look-up list): <input type="text" value="ProductName"/> Parent column(from this list): <input type="text" value="(None)"/> Convert: <input type="checkbox"/> Convert to SharePoint Lookup type

Create a new item in BugList, select “ProductName” to filter “PVersion”.



## BugList: New Item

OK Cancel

Attach File | Spelling... \* indicates a required field

<b>Title *</b>	<input type="text" value="No icon"/>
<b>PName</b>	SharePoint Discussion Column
<b>PVersion</b>	Please select ProductName to filter items: SharePoint Discussion Column (None) (None) 1.0.1209.0 2.1.1205.2

OK Cancel

PVersion

### Thirdly, cascaded lookup function

Edit the column “PtVersion” again, and choose “PName” as the Parent column, which gets information from BugList.

## Change Column: BugList

Use this page to edit a column of this list.

### Name and Type

Type a name for this column.

Column name:

PVersion

The type of information in this column is:

Cascaded Lookup

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes  No

Get information in this site:

Version

Get information from:

VersionList

In this column:

Title

Allow multiple values

Filter column(from look-up list):

ProductName

Parent column(from this list):

PName

Convert:

Convert to SharePoint Lookup type

Create another item in BugList, select “PName”, the “PVersion” will only show the options related to the “PName”.

Sharepoint > Bug > BugList > New Item

## BugList: New Item

OK Cancel

Attach File | Spelling... \* indicates a required field

Title *	No feature icon
PName	SharePoint Discussion Column
PVersion	(None)

OK Cancel

(None)  
1.0.1209.0  
2.1.1205.2

PVersion

**Only show options related to SharePoint Discussion Column**

#### Fourthly, multiple values function

Enter the “Change Column” page to set the “PVersion” column to a multiple values.

## Change Column: BugList

Use this page to edit a column of this list.

### Name and Type

Type a name for this column.

Column name:

PVersion

The type of information in this column is:

Cascaded Lookup

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes  No

Get information in this site:

Version

Get information from:

VersionList

In this column:

Title

Allow multiple values

Filter column(from look-up list):

ProductName

Parent column(from this list):

PName

Convert:

Convert to SharePoint Lookup type

Multi-value choices of “PVersion” can also be filtered by “ProductName”.

Sharepoint > Bug > BugList > No feature icon > Edit Item

## BugList: No feature icon

OK Cancel

Attach File | Delete Item | Spelling... \* indicates a required field

**Title \*** No feature icon

**PName** SharePoint Discussion Column

**PVersion**

1.0.1209.0	Add >	
2.1.1205.2		

< Remove

Created at 12/23/2008 3:50 PM by NEW-8EAFFF0B9CF\Administrator  
Last modified at 12/23/2008 3:50 PM by NEW-8EAFFF0B9CF\Administrator

OK Cancel

### **Fifthly, convert function**

#### **Convert Cascaded Lookup column to SharePoint Lookup type**

Enter “Change Column” page, and convert a Cascaded Lookup to the SharePoint Lookup type.

## Change Column: BugList

Use this page to edit a column of this list.

### Name and Type

Type a name for this column.

Column name:

PVersion

The type of information in this column is:

Cascaded Lookup

### Additional Column Settings

Description:

### Windows Internet Explorer



Are you sure to convert this column to SharePoint Lookup type? If continue, you will lose certain functions of Cascaded Lookup.

OK

Cancel

Get information from:

VersionList

In this column:

Title

Allow multiple values

Filter column(from look-up list):

ProductName

Parent column(from this list):

PName

Convert:

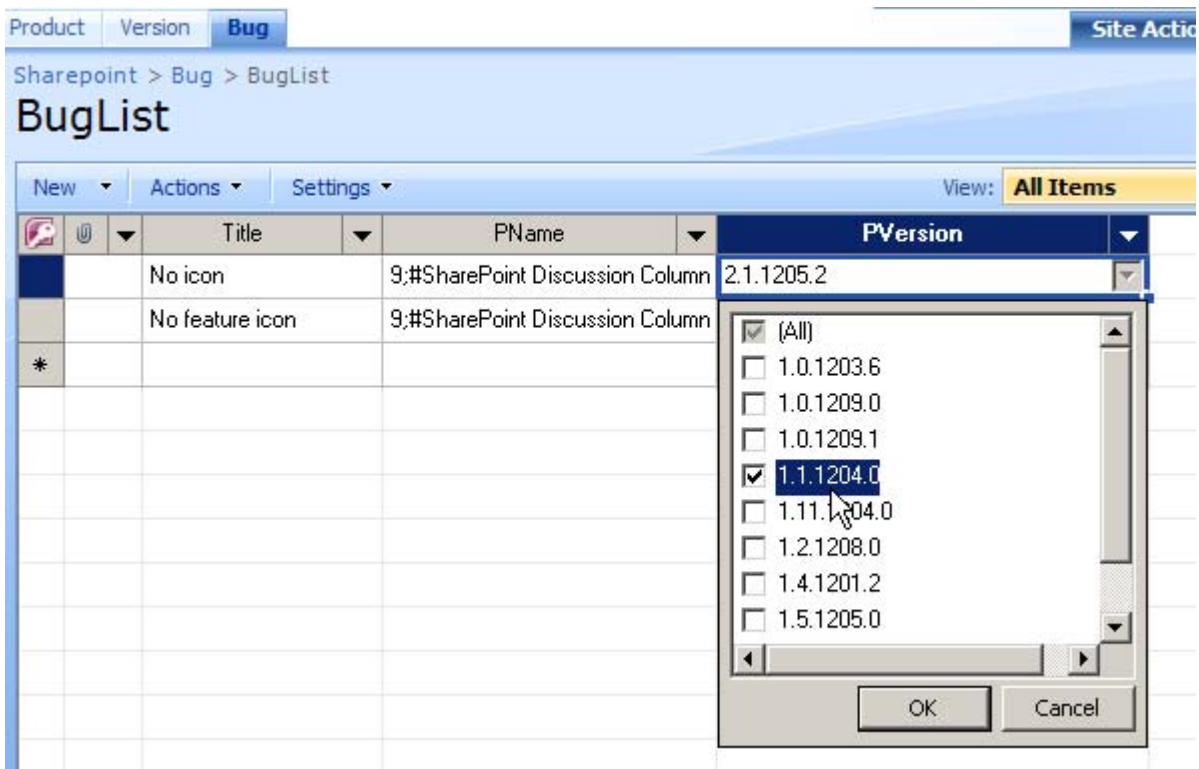
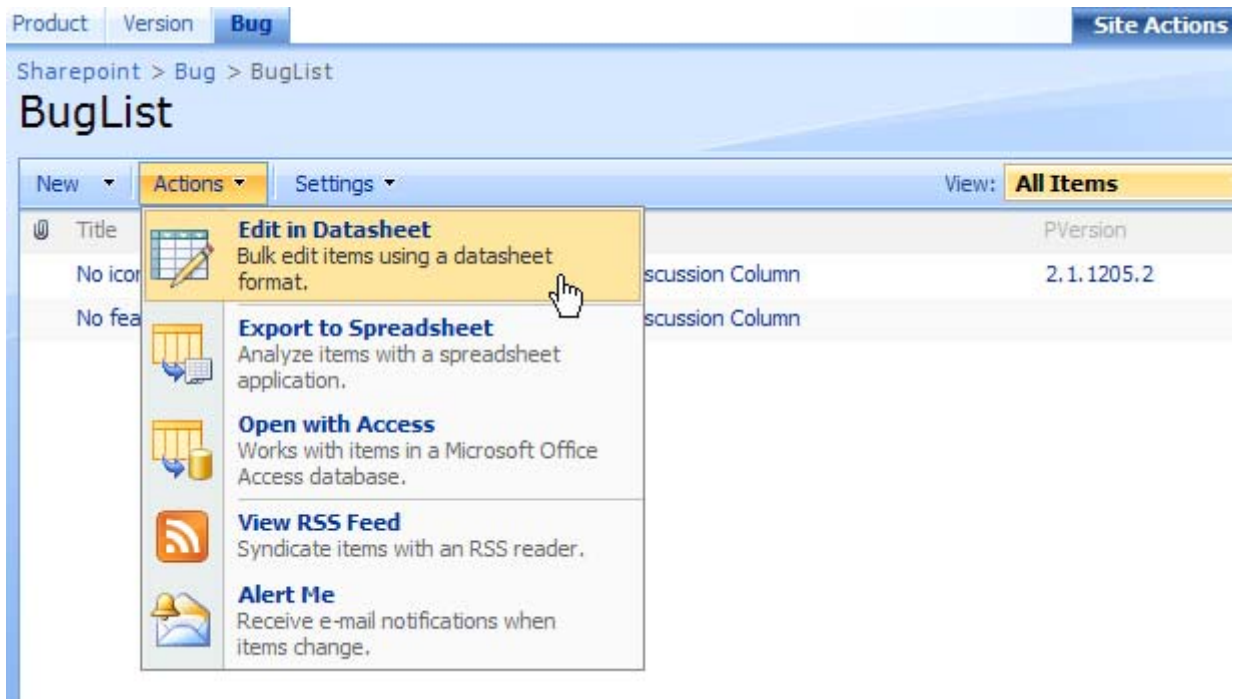
Convert to SharePoint Lookup type

### Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
PName	Cascaded Lookup	
PVersion	Lookup	
Created By	Person or Group	
Modified By	Person or Group	

Then you can edit BugList in Datasheet.



### Convert SharePoint Lookup type to Cascaded Lookup type

Enter Create Column page. Choose the Cascaded Lookup in the radio button. Then click the “Convert to Cascaded Lookup from...” link below to enter “Convert to Cascaded Lookup” page.

### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

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)
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- Discussion Field
- Cascaded Lookup (Information from all sites in the site collection)
- Cross-Site Lookup (Information from all sites in the site collection)
- ProjectReferenceNumber(only 3 characters)
- Business data

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes  No

Get information in this site:

Get information from:

In this column:

Allow multiple values

Filter column(from look-up list):

Parent column(from this list):

Convert:

Convert to SharePoint Lookup type

[Convert to Cascaded Lookup from...](#)

Add to default view

Convert from existed lookup column to cascaded lookup



## Convert to Cascaded Lookup

Please select lookup column to convert it to Cascaded Lookup

### Convert to Cascaded Lookup from

Please select lookup column in the right drop-down list to convert it to Cascaded Lookup

ProductVersion

OK Cancel

### Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
ProductName	Cascaded Lookup	
ProductVersion	Cascaded Lookup	
Created By	Person or Group	
Modified By	Person or Group	

# SharePoint Cross-Site Lookup Installation Instruction

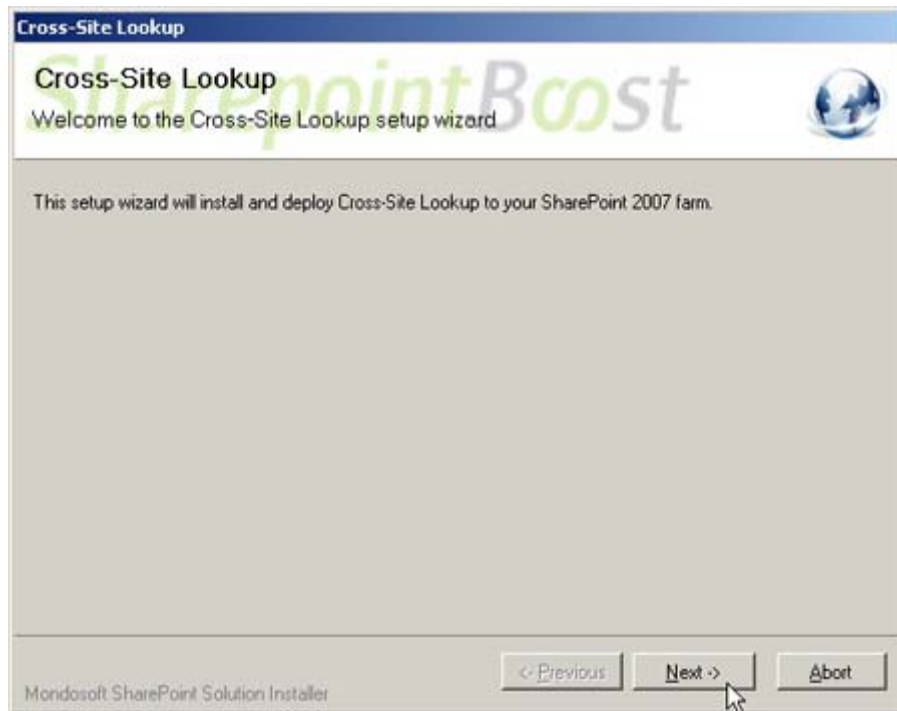
## System Requirement

Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007.

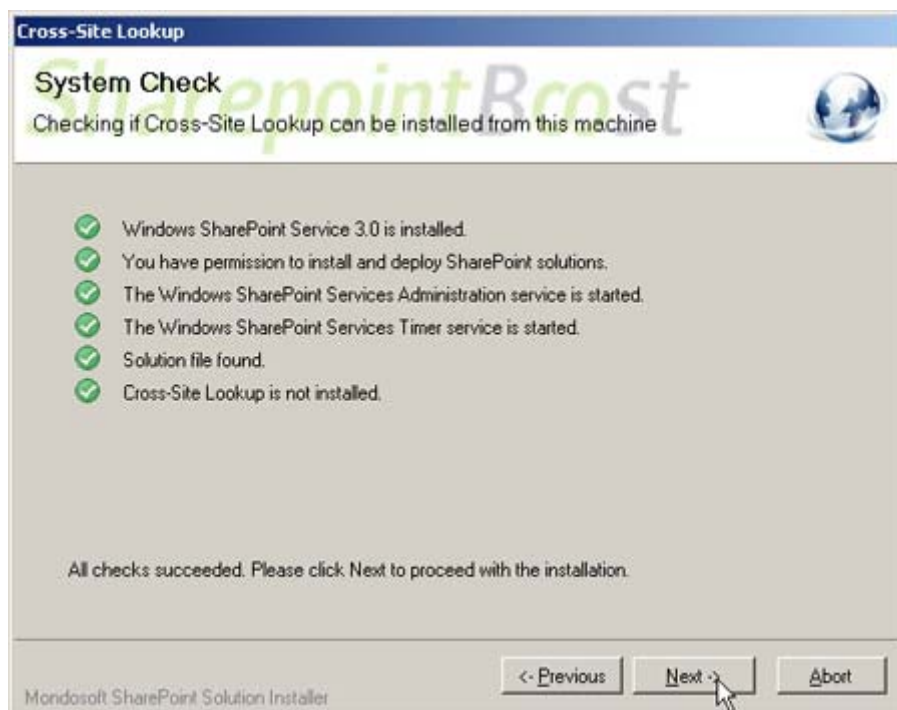
## Install

Download and release SharePoint Cross-Site Lookup file, and run "setup.exe".

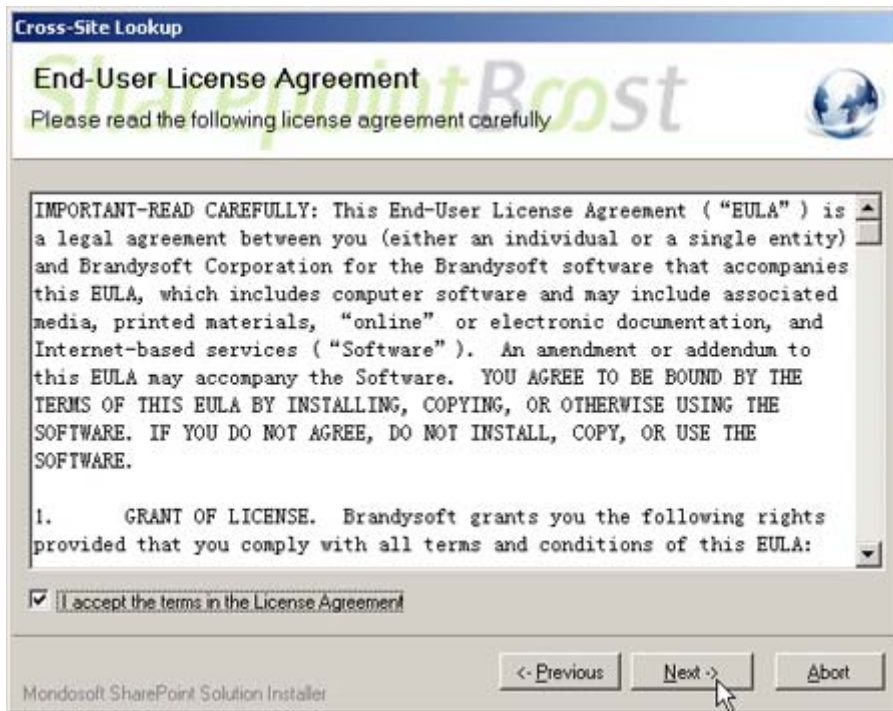
Click "next".



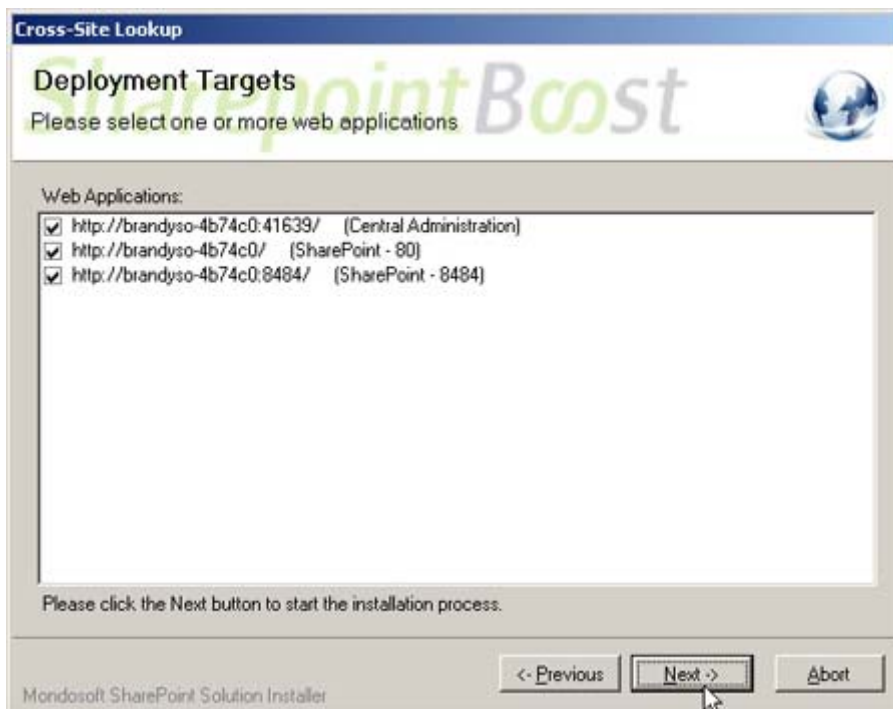
After system check is finished, click "Next".



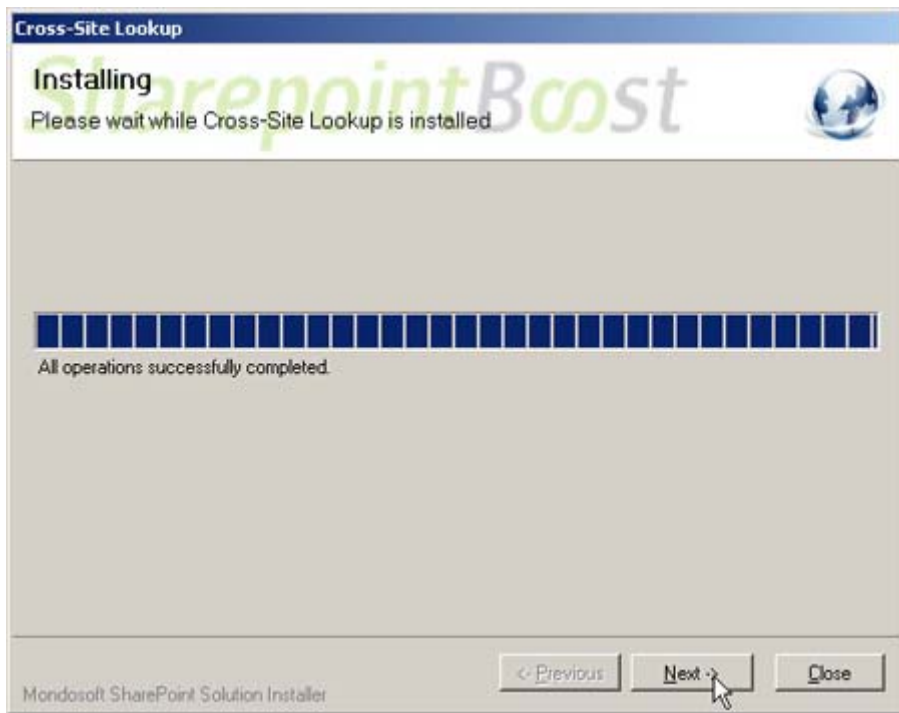
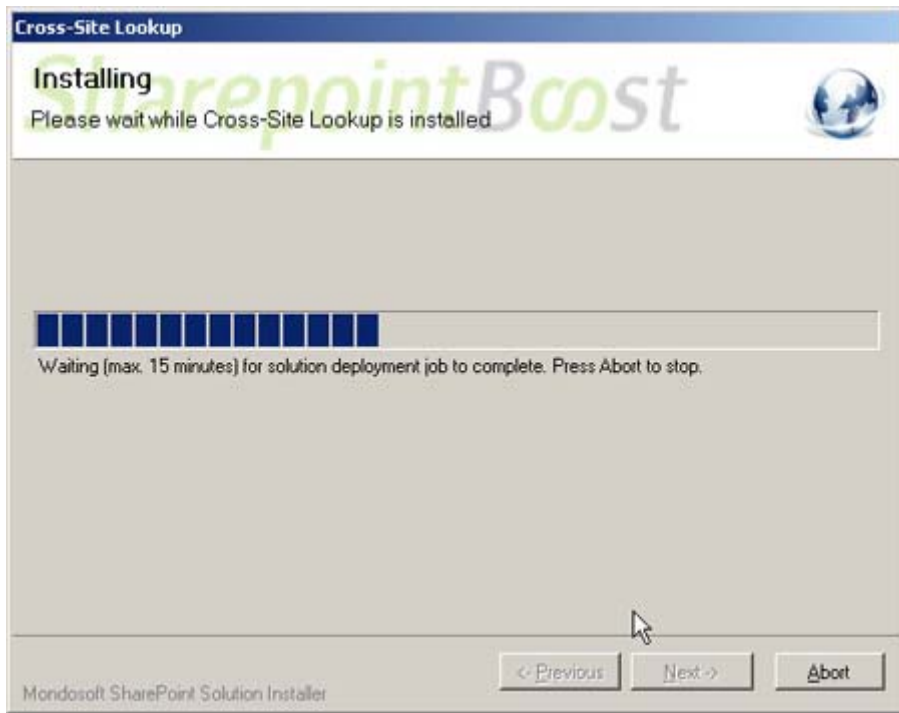
After reading License Agreement, click "accept" and go to next step.



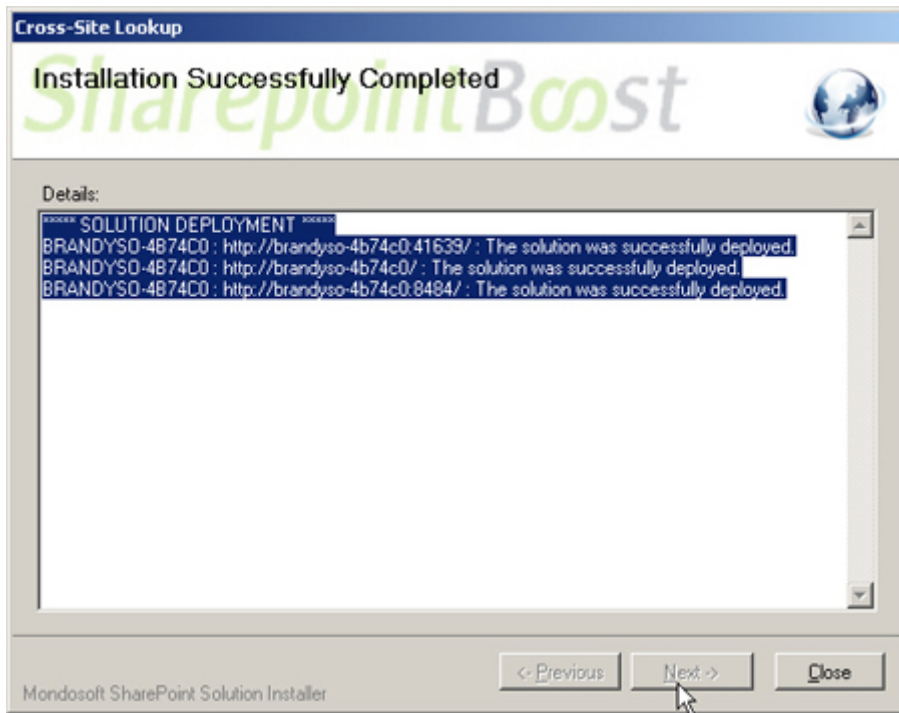
Select one or more web applications and click "Next".



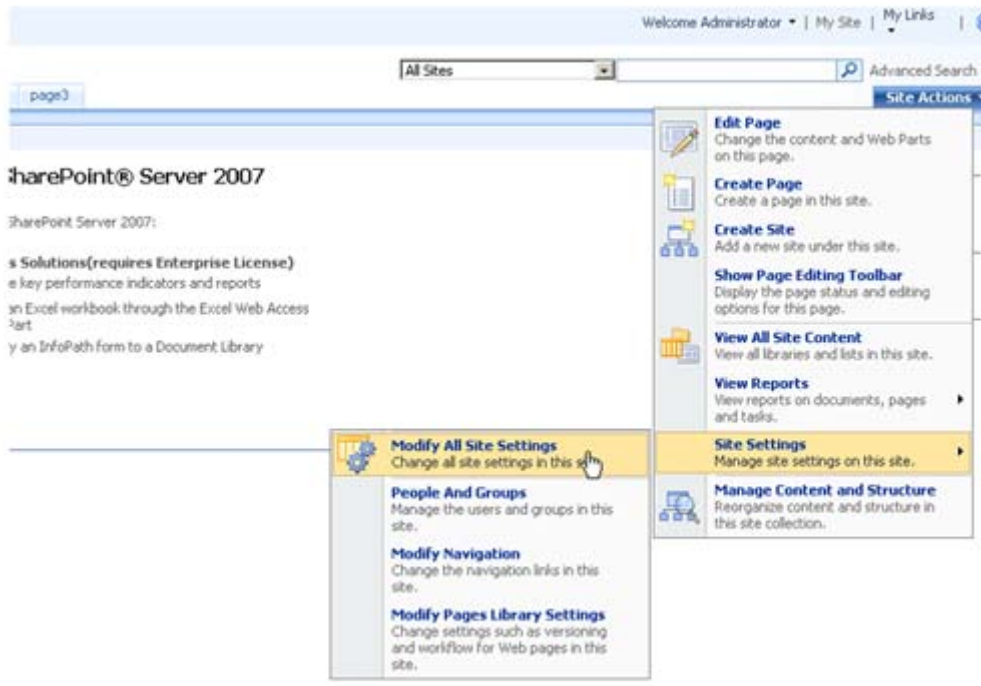
Wait for installing, and click "Next" for more deployment details.



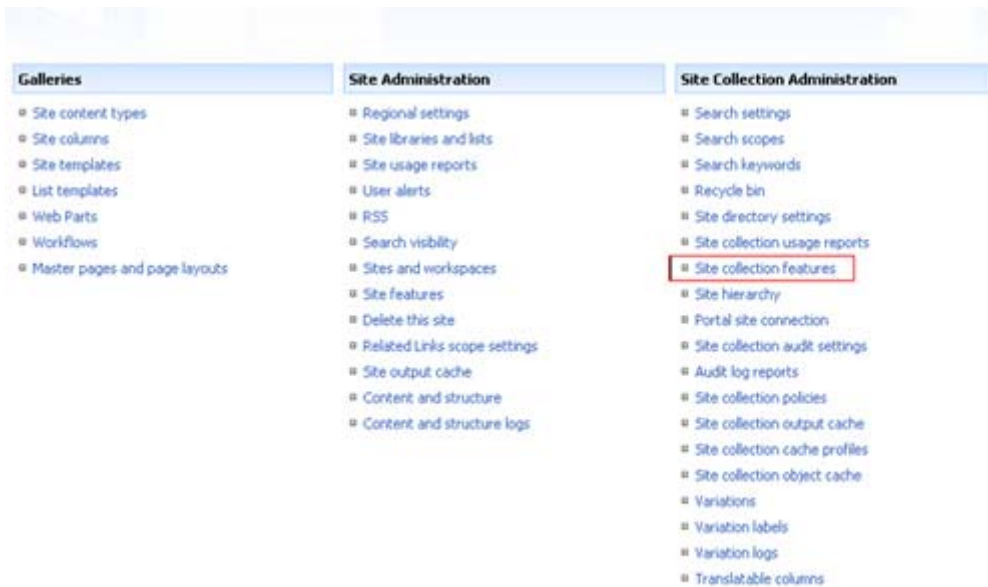
SharePoint Cross-Site Lookup has been successfully installed on your farm.



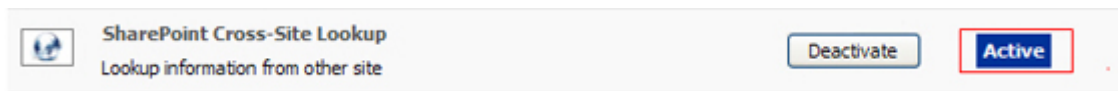
Choose Site Actions dropdown menu, click “Modify All Site Settings”, and enter Site Settings page.



Select “Site Collection Features”.

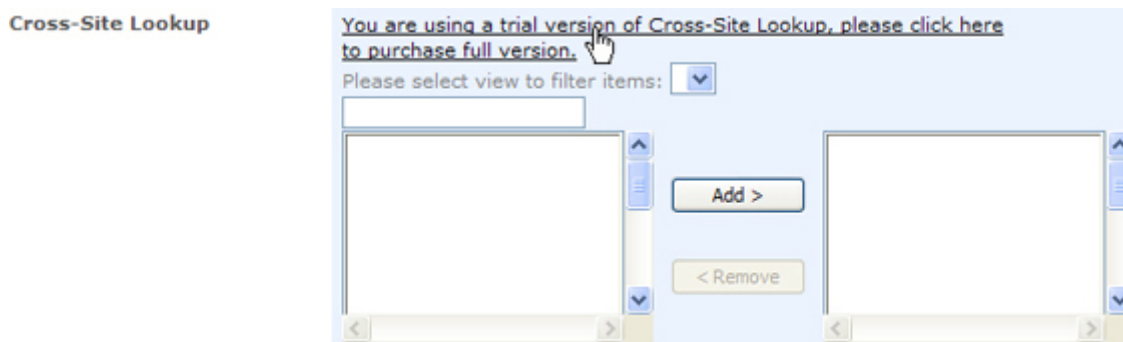


After installation, activate SharePoint Cross-Site Lookup in the Site Collection Features.

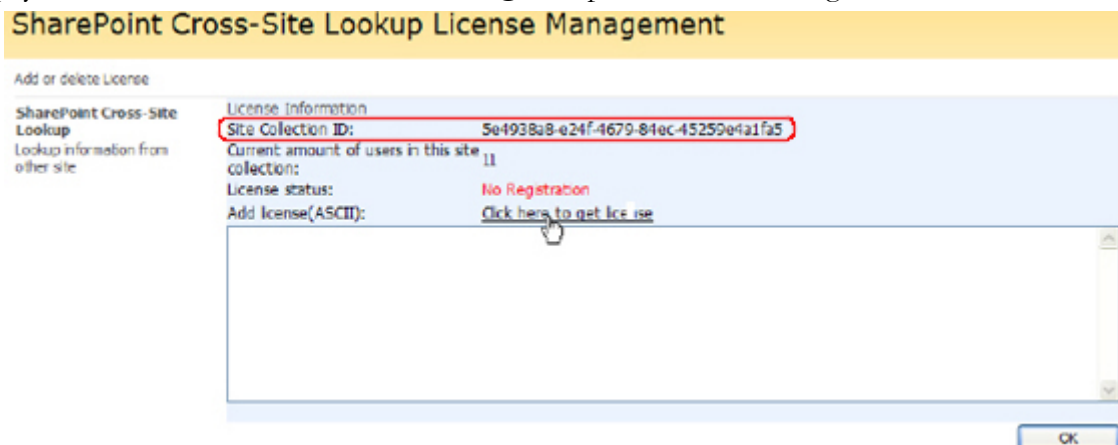


## License management

Click the Cross-Site Lookup trial version link in the item, and visit SharePoint Cross-Site Lookup License Management page.



After payment, send site collection ID to sales@sharepointboost.com to generate license code.



Enter license code and click "OK".

## SharePoint Cross-Site Lookup License Management

Add or delete License

SharePoint Cross-Site Lookup Lookup information from other site	License Information	
	Site Collection ID:	5e4938a8-e24f-4679-84ec-45259e4a1fa5
	Current amount of users in this site collection:	11
	License status:	License is validated
	Add license(ASCII):	<a href="#">Click here to get license</a>

```
8ca2f4b6-e077-4a67-91af-  
f7156dda533avSXvd2XHFkY2yYimoSX7a6BwDkaApM2P2v90|Q|dLjgp9U3b59n0i0B3kyq8xeuNZabtyUGHAgR0HUN  
L71+poFK1iDCFlWNgUQFmYf2cRawb/Cywox+wIvHspDgh/+qMoXVTG0odjLloJN3oeZWQno2fxSZawR5Adjw+Ii+eC7  
YJ)+VirXC0aZc30VDSenp+vd81cBpNp4T5w97j9wyWpJYnkdQ2n+nUI8LTKAHXCH9kEXD0z16k100rdybCkEcPXjyaM  
DjuDdoTiwDveBzBXqkS2pYYUjQXrkS6uRpPa45xk7HeQAsZSHR:16mxPPgN3U/7WcOwF9Bjw5nk3grqjPuUr4uve6b  
7oG+x7wasvIwP7FaTX138Och8kaIR3oMIGrWfPQzmCeX9CtmB4rF/y438Lj7KjFO6ots071Cyr8k6hc/eXrcR91LW+3Av  
stkCdis/rjuQaGg2EcGdMzCRlqTBcJjdkvPuJWlq16ESuS9R3H52B7C67SMUcGahn91O7FpCoQsvDX3x7Y8Eh05yoZ  
rtkOtlvSBcmFT4nUP40ZFw7pMqep1Nn333RH5Bem2m+ISQwPz+wgtp35xrrXl7XJv3aLbJc01EBIRdAZ1ZmjYV5X6Fz  
wUos0UKNksJL2141W04MzHRFZ4GgvhXQyLgug4+U=btAdx3yF6wMhFaZRnQw==
```

You license has been validated, Please switch to previous page and Refresh(F5) it.

OK

### Uninstall

Run “setup.exe” again. (If your installation file has been deleted, you can download it from <http://www.sharepointboost.com>). In Repair or Remove page, select the Remove radio button and click “Next”, SharePoint Cross-Site Lookup will be uninstalled.

**Cross-Site Lookup**

### Repair or Remove

Please select the operation you wish to perform

Cross-Site Lookup is already installed. What would you like to do?

**Repair**  
Retracts the solution from all web applications and deploys it once again.

**Remove**  
Retracts the solution from all web applications and deletes it from the SharePoint solution store.

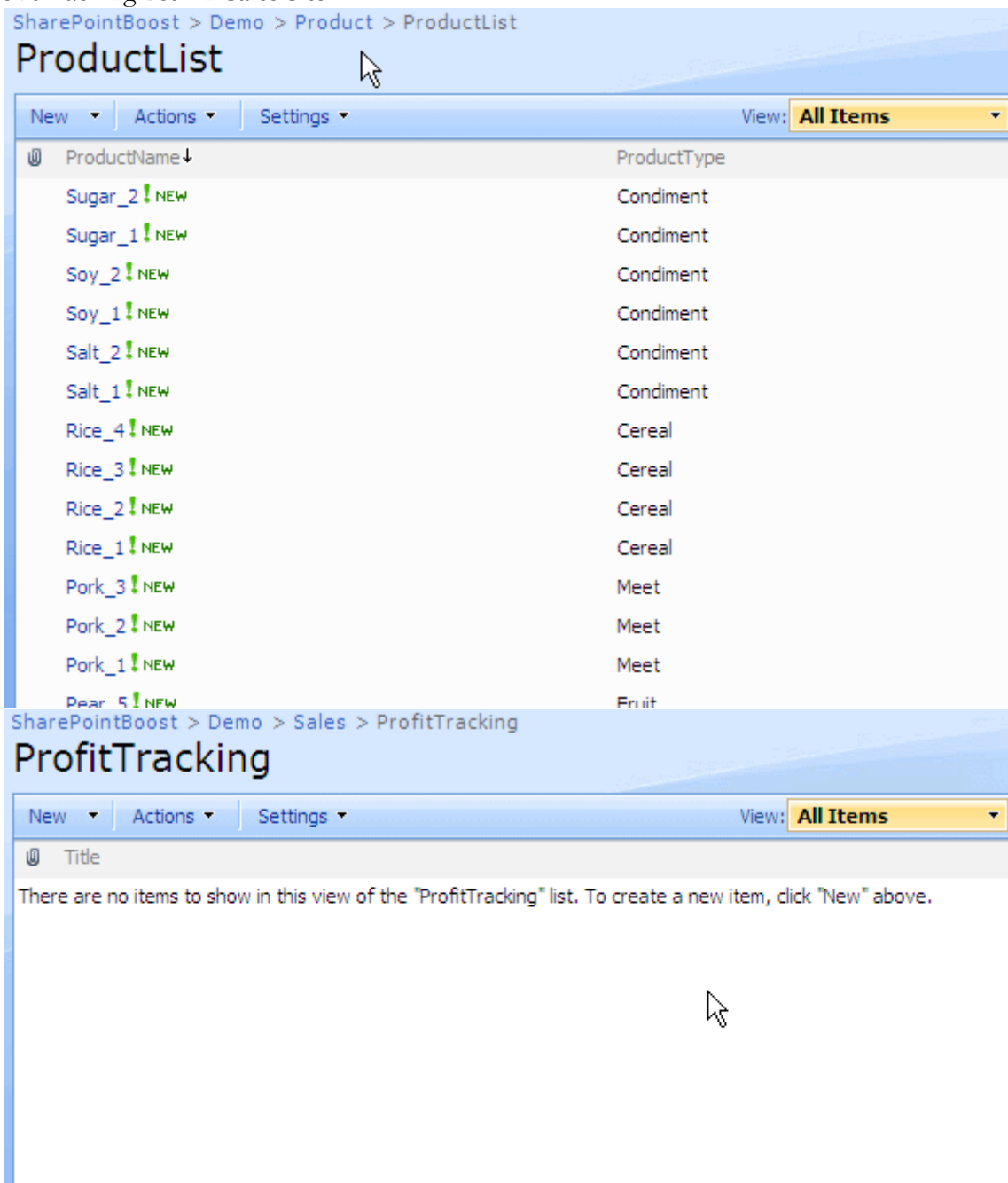
< Previous    Next >    Abort

Mondosoft SharePoint Solution Installer

## SharePoint Cross-Site Lookup Tutorial

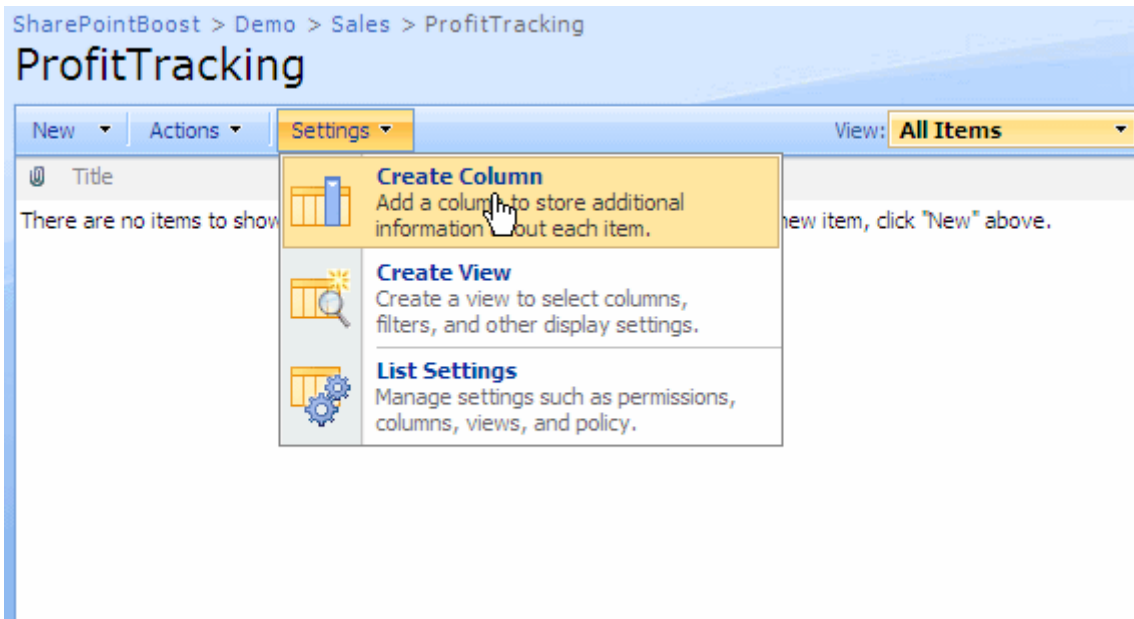
The following is a typical example application of SharePoint Cross-Site Lookup.

Two lists have been built in two sites respectively. One is “ProductList” in Product Site, and the other is “ProfitTrackingList” in Sales Site.



Create a new column in ProfitTrackingList.





On “Create Column” page, choose “Cross-Site Lookup” column type and get information from ProductList in the Product Site:

## Create Column: ProfitTracking

Use this page to add a column to this list.

### Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

ProductName

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)
- Cross-Site Lookup (Information from all sites in the site collection)
- Business data

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes  No

Get information in this site:

Product

Get information from:

ProductList

In this column:

ProductName

Allow multiple values

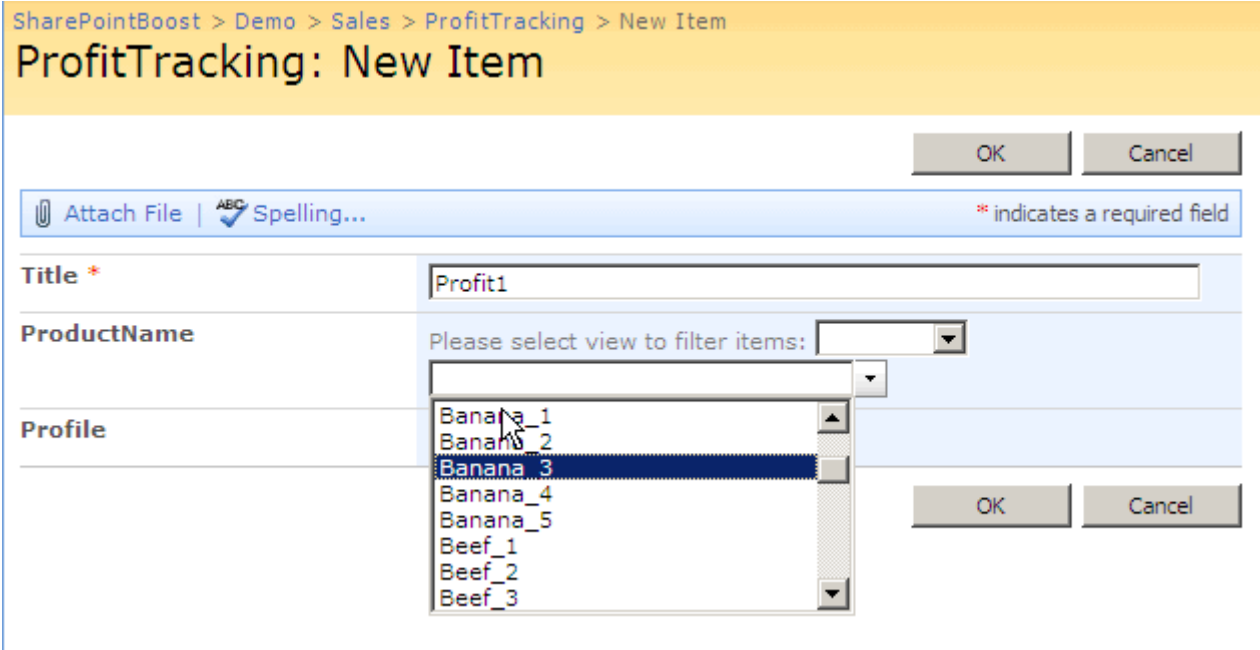
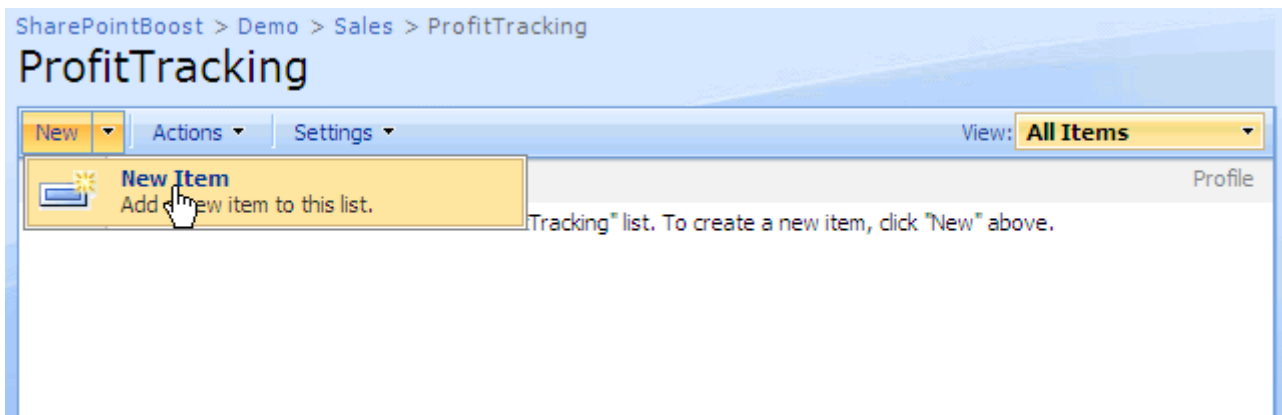
Convert to SharePoint Lookup type

Add to default view

OK

Cancel

Create a new item in “ProfitTracking” list and look at the Cross-Site Lookup column in action.



Edit Cross-Site Lookup column in "ProfitTrackingList" and select "Allow multiple values".

## Change Column: ProfitTracking

Use this page to edit a column of this list.

<b>Name and Type</b> Type a name for this column.	Column name: <input type="text" value="ProductName"/> The type of information in this column is: Cross-Site Lookup
<b>Additional Column Settings</b> Specify detailed options for the type of information you selected.	Description: <input type="text"/> Require that this column contains information: <input type="radio"/> Yes <input checked="" type="radio"/> No Get information in this site: Product Get information from: ProductList In this column: <input type="text" value="ProductName"/> <input checked="" type="checkbox"/> Allow multiple values <input type="checkbox"/> Convert to SharePoint Lookup type

Edit item created in ProfitTrackingList.

SharePointBoost > Demo > Sales > ProfitTracking

### ProfitTracking

New Actions Settings View: **All Items**

Title	ProductName	Profile
Profit1 <small>NEW</small>	Banana_3	10,000

- View Item
- Edit Item**
- Manage Permissions
- Delete Item
- Alert Me

# ProfitTracking: Profit1

OK Cancel

Attach File | Delete Item | Spelling... \* indicates a required field

**Title \*** Profit1

**ProductName** Please select view to filter items:   
Apple  
Apple\_1  
Apple\_2  
Apple\_3  
Apple\_4  
Apple\_5  
Banana\_1  
Banana\_2  
Banana\_4  
Add >  
< Remove  
Banana\_3

**Profile** 10,000

Created at 7/23/2008 7:36 PM by BRANDYSOFT\Administrator  
Last modified at 7/23/2008 7:36 PM by BRANDYSOFT\Administrator

OK Cancel

# ProfitTracking

New Actions Settings View: All Items

Title	ProductName	Profile
Profit1 <span style="color: green;">! NEW</span>	Banana_3; Apple_1; Apple_2; Apple_3; Apple_4; Apple_5	10,000

In ProductList, you can create some views to show products with different product types.

# ProductList

New Actions Settings View: Condiment View

ProductName	ProductType
Soy_1 <span style="color: green;">! NEW</span>	Condiment
Soy_2 <span style="color: green;">! NEW</span>	Condiment
Salt_1 <span style="color: green;">! NEW</span>	Condiment
Salt_2 <span style="color: green;">! NEW</span>	Condiment
Sugar_1 <span style="color: green;">! NEW</span>	Condiment
Sugar_2 <span style="color: green;">! NEW</span>	Condiment

All Items  
Cereal View  
Condiment View  
Fruit View  
Meat View  
Modify this View  
Create View

Edit item in the ProfitTrackingList, you can select view to filter lookup items.

# ProfitTracking: Profit1

OK Cancel

Attach File | Delete Item | Spelling... \* indicates a required field

**Title \*** Profit1

**ProductName** Please select view to filter items: [Dropdown]

- Banana\_1
- Banana\_2
- Banana\_4
- Banana\_5
- Beef\_1
- Beef\_2
- Beef\_3
- Corn\_1

Add > < Remove

- All Items
- Cereal View
- Condiments View
- Fruit View
- Meat View

Apple\_4  
Apple\_5

**Profile** 10,000

Created at 7/23/2008 7:36 PM by BRANDYSOFT\Administrator  
Last modified at 7/23/2008 7:39 PM by BRANDYSOFT\Administrator

OK Cancel

# ProfitTracking: Profit1

OK Cancel

Attach File | Delete Item | Spelling... \* indicates a required field

**Title \*** Profit1

**ProductName** Please select view to filter items: Cereal View [Dropdown]

- Corn\_1
- Corn\_2
- Corn\_3
- Corn\_4
- Rice\_1
- Rice\_2
- Rice\_3
- Rice\_4

Add > < Remove

- Banana\_3
- Apple\_1
- Apple\_2
- Apple\_3
- Apple\_4
- Apple\_5

**Profile** 10,000

Created at 7/23/2008 7:36 PM by BRANDYSOFT\Administrator  
Last modified at 7/23/2008 7:39 PM by BRANDYSOFT\Administrator

OK Cancel

Edit Cross-Site Lookup column and select "Convert to SharePoint Lookup type".

## Change Column: ProfitTracking

Use this page to edit a column of this list.

### Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

Cross-Site Lookup

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

### Internet Explorer

Are you sure to convert this column to SharePoint Lookup type? If continue, you will lose certain functions of Cross-Site Lookup.

 Allow multiple values Convert to SharePoint Lookup type

### Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
ProductName	Lookup	
Profile	Number	
Created By	Person or Group	
Modified By	Person or Group	

Then you can edit ProfitTrackingList in Datasheet.

# ProfitTracking

New | Actions | Settings | View: All Items

Title	Profile
Profit1	10,000

**Edit in Datasheet**  
Bulk edit items using a datasheet format.

**Export to Spreadsheet**  
Analyze items with a spreadsheet application.

**Open with Access**  
Works with items in a Microsoft Office Access database.

**Alert Me**  
Receive e-mail notifications when items change.

# ProfitTracking

New | Actions | Settings | View: All Items

Title	ProductName	Profile
Profit1	Banana_3; Apple_1; Apple_2; Apple_3; Apple_4; Apple_5	10,000

Apple\_2  
 Apple\_3  
 Apple\_4  
 Apple\_5  
 Banana\_1  
 Banana\_2  
 Banana\_3  
 Banana\_4  
 Banana\_5  
 Beef\_1

OK Cancel