

Connected Systems

Filtered Dropdown for SharePoint 2010 (Foundation and Server)

User Guide

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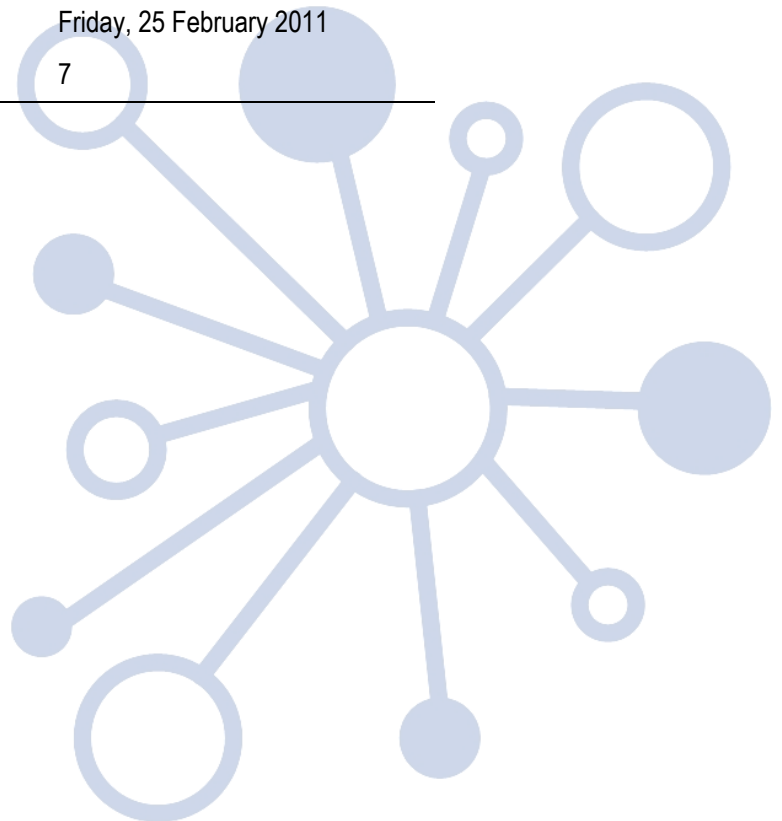


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1 How it works?

The Connected Systems Filtered Dropdown Feature for Microsoft's SharePoint 2010 technologies (both Foundation and Server) is a flexible field control that supports the filtering of list information based on related lists. Field values are configured to relate to parent lookup lists as a means of filtering the field values.

SharePoint 2010 customers now have the opportunity to have dynamically changing dropdown list values, making it easier to select the correct field values based on automatically filtered data – this improves data quality.

The Connected System Filtered Dropdown feature adds value to the SharePoint 2010 platform by:

- ❖ Improving the quality of data available in the dropdown; this is achieved via:
 - Dynamically updating the dropdown based on the filter selected.
 - Only displaying related data to the filter selected in the dropdown.
 - Supporting cross-site lookup (all sites within same site collection).
- ❖ Improving the user experience when relating metadata; this is achieved through:
 - Supporting multiply filtered dropdown fields within the same list. There is no limit to the number of filtered dropdowns that can be applied to a list.
 - Disables the filtered dropdown until parent filters have been added; this reduces confusion regarding filtered field entry.
- ❖ Making the feature available across the entire Farm deployment for all site collection to take advantage.

2 How to use the Filtered Dropdown Field Feature?

2.1 What does it install?

The Filtered Dropdown Field feature installs the following components:

- ❖ Core
 - Filtered Dropdown Custom Field

2.2 Using the Filtered Dropdown Field Control – create the Parent Filtered Column first.

Given this solution is a globally deployed field control, the configuration of this control occurs when a column is added to a list.

1. Located the list you would like to add the Filtered Dropdown Field Control to.
2. On the List tab | Under Manage Views, select Create Column. The following modal dialog box will appear.

Create Column

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)
- External Data
- CS Drop Down control with filtering

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Select site:

Select list:

Select column:

Filter column:

Parent column:

3. Enter the field name of the first or parent filter you would like to use to filter the second lookup. For example, if you wanted to filter the Council name based on the Suburb filter, Suburb would be the first Filtered Dropdown to add.
4. The site dropdown allow another site value to be looked up. Once the site is selected, you'll notice the Select list dropdown will refresh with a new set of lists from the site selected. Select the list you wish to retrieve the data from to populate the current field, in our example, this is the Suburb list.
5. Select the column name; this will determine the field type as the new field will be based on this content. In our example, this is the Suburb Name.
6. Given this field is the parent Filtered Dropdown field that all subsequent field will reference, the remaining two fields are left blank. This is the same as creating a Lookup field type to another list.

Please Note – the Parent field **MUST** be ordered before the child Filtered Dropdown as there is a reliance on the Parent field being set before the child fields are active.

2.3 Creating Filtered Dropdowns using the Parent Filter

Once the Parent filter is configure, we are now able to use this to filter all remaining fields we would like to look up and use.

1. On the List tab | Under Manage Views, select Create Column. The following modal dialog box will appear.

The screenshot shows the 'Create Column' dialog box with the following configuration:

- Name and Type:**
 - Column name: Council
 - Type: CS Drop Down control with filtering
- Additional Column Settings:**
 - Description: (empty)
 - Require that this column contains information: No
 - Enforce unique values: No
 - Select site: Document Workspace
 - Select list: Suburbs
 - Select column: Council
 - Filter column: Suburb Name
 - Parent column: Suburb

2. Enter the field name of the lookup value you would like to return, in our example this is Council.
3. Select the site dropdown and select the site your source list resides.
4. Select the list that the Filtered Dropdown will use to filter the values, the Select Column the Filter Column and Parent Column. In our example, if you wanted to filter the Council name based on the Suburb filter, Suburb is the List name, Council is the return value or Select Column, Filter column is the column in the Suburb list we will be using to filter and the Parent Column is the Suburb column added from the previous section.
5. Once added to the list, select "add new item" to test.

6. In our example, if a Suburb is selected that is in two or more Councils, those Councils will be filtered based on Suburb selection.

The screenshot shows a dialog box titled "AddressList - New Item". It features a ribbon-style menu with "Edit" selected, containing "Save", "Cancel", "Paste", "Cut", "Copy", and "Attach File" buttons. Below the menu are three input fields: "Address *" with the text "123 Leach Hwy", "Suburb" with a dropdown menu showing "Mount Claremont" and a "Suburb" label, and "Council" with a dropdown menu showing a filtered list of "Select...", "Select...", "Town of Cambridge", and "City of Nedlands". At the bottom right, there are "Save" and "Cancel" buttons.