

Connected Systems

Hierarchy Lookup for SharePoint 2010 (Foundation and Server)

User Guide

Version number:	1.0
Release date:	Monday, 28 February 2011
Pages	8

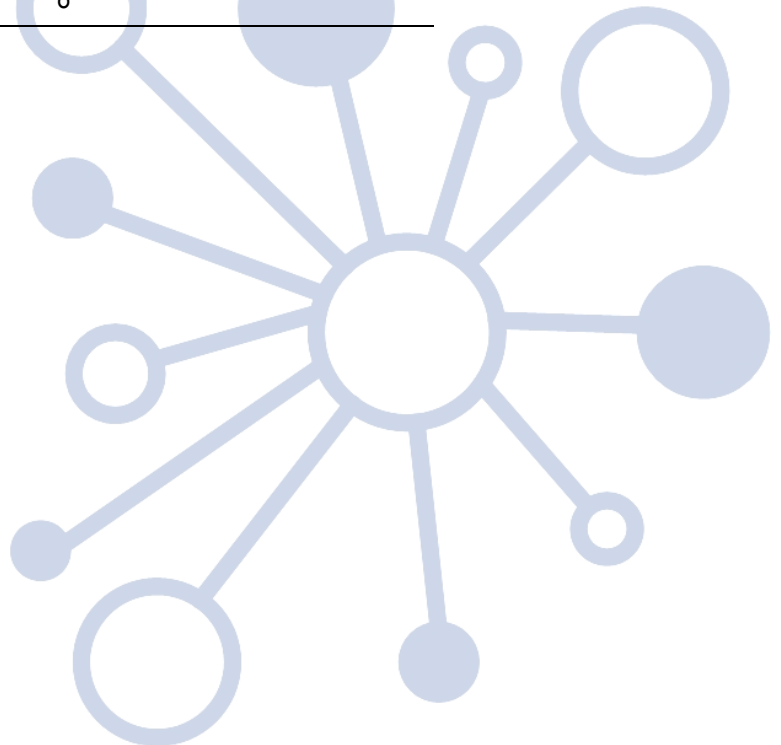


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1 How it works?

The Connected Systems Hierarchy Lookup Feature for Microsoft's SharePoint 2010 technologies 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. The result is a single concatenated field being displayed that is delimited by a configurable character.

The filter support makes it easier for people to select the correct field values as they are filtered automatically.

This field also supports the ability to return additional lookup information from the source list and add these as referenced lookup fields to the destination list. The returned lookup field in the destination list can be used in list views to display their contents.

The field concatenation is made up of a set of hyperlinks to references each of the associated lookup lists. These can be selected to give easy access to the source lookup list that makes up each on the concatenated fields of the hierarchy lookup field.

SharePoint customers now have the opportunity to have dynamically changing dropdown list values and display the results of their selection in one concatenated field control.

The aims of the Connected Systems Hierarchy Lookup feature for SharePoint 2010 are to improve on 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 each hierarch field.
 - Disables the filtered dropdown until parent filters have been added; this reduces confusion regarding filtered field entry.
- ❖ Improve the lookup capability of related data by:
 - Supporting additional lookup fields returned as read-only values. These are prefixed with the list name to easily identify the lookup values.
 - Hyperlinking the hierarchy field values to their source list for easy maintenance of source list information.
- ❖ Improving the look and feel by allowing the delimiter character to be configurable.
- ❖ Making the feature available across the entire Farm deployment for all site collection to take advantage.

The Connected Systems Hierarchy Lookup feature for SharePoint 2010 adds significant value to Microsoft SharePoint 2010 Lists and assists users in filtering field lookups and returns the values in one easy to use concatenated field.

2 How to use the Hierarchy Lookup Field Feature?

2.1 What does it install?

The Hierarchy Lookup Field feature installs the following components:

- ❖ Core
 - Hierarchy Lookup Custom Field

2.2 Using the Hierarchy Lookup Field Control

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 Hierarchy Lookup Field Control to.
2. On the List tab | Under Manage Views, select Create Column. The following modal dialog box will appear.

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 Hierarchy Lookup Control

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

Build Lookup Hierarchy:

General Configuration
Hierarchy Separator:

Base Lookup
Lookup List:
Lookup Display Field:
Additional Display Fields:
 State
 Regions
 PostCode

Hierarchy Item
Select Lookup Field:
Select Display Field:

Hierarchy Item
Select Lookup Field:
Select Display Field:

Add to default view

3. Enter the field name of the based item or destination item filter you would like to use to filter the second lookup. For example, if you wanted to filter the Suburb name based on the Region, Suburb would be the first or base item.
4. Select any other lookup values to retrieve from the source list. These will be added to the destination list as lookup fields. These fields are prefixed with the list name to identify which fields are read-only lookups from another list.
5. Select the Add Level button to create the filtered item or category by which to filter the destination field. In the example, Region filters suburbs to be displayed so Region is the next filter.
6. The hierarchy lookup uses the relationships in SharePoint lookup fields to offer only the related lists based on the destination field selected. This makes it easy for the user when configuring this field control.
7. Select the column name or display field, this will make up part of the concatenated hierarchy lookup field.
8. Repeat steps 5-7 for any subsequent related lookup lists.

Please Note – the hierarchy lookup field uses the lookup relationships in SharePoint to relate and connected field relationships.

2.3 Viewing the settings and additional lookup fields

Once the hierarchy field is configured, you can check the configuration and see how any additional fields are treated within the source list.

1. On the List tab | List Settings, the following screen will appear.

Columns

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

Column (click to edit)	Type	Required
Title	Single line of text	✓
CustomerID	Single line of text	
CustomerName	Single line of text	
PhoneNo	Single line of text	
Suburb	CS Hierarchy Lookup	
Suburb:PostCode	Lookup	
Created By	Person or Group	
Modified By	Person or Group	

[Create column](#)
[Add from existing site columns](#)
[Column ordering](#)
[Indexed columns](#)

2. As displayed, the fields have been added as:
 - a. CS Hierarchy Lookup field: This is the custom field that concatenates the filtered selections into one field.
 - b. Lookup field: This is a read-only lookup field that returns the value of the list field being looked up. The list reference is a prefix to the field name to help distinguish where the information source list is.

3. You may change whether these fields are part of the default list view. As displayed, the fields can be removed or re-ordered.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	CustomerID	1
<input checked="" type="checkbox"/>	CustomerName	2
<input checked="" type="checkbox"/>	PhoneNo	3
<input type="checkbox"/>	Attachments	4
<input type="checkbox"/>	Content Type	5
<input type="checkbox"/>	Created	6
<input type="checkbox"/>	Created By	7
<input type="checkbox"/>	Edit (link to edit item)	8
<input type="checkbox"/>	Folder Child Count	9
<input type="checkbox"/>	ID	10
<input type="checkbox"/>	Item Child Count	11
<input type="checkbox"/>	Modified	12
<input type="checkbox"/>	Modified By	13
<input checked="" type="checkbox"/>	Suburb	14
<input checked="" type="checkbox"/>	Suburb:PostCode	15
<input type="checkbox"/>	Title	16
<input type="checkbox"/>	Title (linked to item with edit menu)	17
<input type="checkbox"/>	Title (linked to item)	18
<input type="checkbox"/>	Type (icon linked to document)	19
<input type="checkbox"/>	Version	20

2.4 Using the hierarchy lookup field

Please note: When adding the field to the list the configuration sets the destination field first with the parent or filter fields defined subsequently. However, when using the field during an add or edit function, the field order is reversed so the parent filtering may return the source field list and lookups for selection.

1. In our example, the State and Region and rendered first to allow the filtering of Suburb data. State is selected, then Region is selected (filtered by State).

The screenshot shows a 'Customer - New Item' form with the following fields and values:

- Title: Connected Systems
- CustomerID: 00001
- CustomerName: Rick Rosato
- PhoneNo: 555 5555 5555
- Suburb: WA (State) > Perth (Region)

A dropdown menu is open for the Suburb field, showing a list of suburbs. The selected suburb is 'Perth'.

2. Finally the Suburb fields are filtered and available as the last filter in the hierarchy lookup. The selected suburb will determine the associated lookup field data to be returned.
3. After entering in the suburb, the list view will show the value as “parent > parent > child” and all lookup field will be displayed in the list view as read-only lookups.

CustomerID	CustomerName	PhoneNo	Suburb	Suburb:PostCode
00001	Rick Rosato	1234567890	WA > Perth > West Perth	6005

4. In edit or view mode, the fields are listed vertically on the edit/view form.

The screenshot shows a window titled "Customer - Connected Systems" with a "View" tab selected. The window contains a toolbar with icons for "Edit Item", "Version History", "Manage Permissions", "Delete Item", and "Alert Me". Below the toolbar is a table with the following data:

Title	Connected Systems
CustomerID	00001
CustomerName	Rick Rosato
PhoneNo	1234567890
Suburb	WA > Perth > West Perth
Suburb:PostCode	6005

A "Close" button is located at the bottom right of the form.

Please note that PostCode field is a read-only lookup to the Suburb list and is not stored in the destination list, simply referenced. If the Suburb selection changes for a Customer, the PostCode will automatically change to be the correct Post Code for the Suburb selected.