



**Virto Cross Site Lookup
for Microsoft SharePoint
Release 3.1.0**

User and Installation Guide



Table of Contents

SYSTEM/DEVELOPER REQUIREMENTS	3
OPERATING SYSTEM	ERROR! BOOKMARK NOT DEFINED.
SERVER	ERROR! BOOKMARK NOT DEFINED.
BROWSER.....	3
INSTALLATION	4
INSTALLING VIRTO CROSS SITE LOOKUP	4
LICENSE ACTIVATION	7
UPGRADING VIRTO CROSS SITE LOOKUP.....	7
UNINSTALLING VIRTO CROSS SITE LOOKUP	8
VIRTO CROSS SITE LOOKUP FEATURE	9
WORKING WITH CROSS-SITE LOOKUPS	9
<i>Adding New Cross-Site Lookup Columns</i>	<i>10</i>
Basic Fields' Parameters.....	10
Multiple Values and Duplicate Values	12
Additional Columns	12
Filter Options.....	Error! Bookmark not defined.
Field Dependence Options.....	12
Conversion of Standard Lookup to Virto Lookup.....	13
<i>Using Lookups for Data Reference</i>	<i>14</i>
<i>Editing Fields in Datasheet View</i>	<i>17</i>
VERSION RELEASE HISTORY	18

Virto SharePoint Cross Site Lookup

Features List

Feature	Version
Cross-site lookup of list from current site collection	1.0
Autocomplete option	1.0
Multiselection can be applied for lookup fields	1.0
Advanced filter options	1.0
Quick conversion of existing SharePoint lookup to Virto Cross Site lookup	1.0
Displaying additional columns for lookup list items	1.0
Creating parent-child relationships between columns in the same list so that data entered in one field filters the options presented in another	1.0
Ability set dependence between lookup fields	1.0

System/Developer Requirements

Operating System

Microsoft Windows Server 2003, 2008, 2012

Server

SharePoint Release 2016:

- Microsoft SharePoint Server 2016;
- Microsoft .NET Framework 4.5.2;

SharePoint Release 2013:

- Microsoft Windows SharePoint Foundation 2013 or Microsoft Office SharePoint Server 2013;
- Microsoft .NET Framework 4.5;

SharePoint Release 2010:

- Microsoft Windows SharePoint Foundation 2010 or Microsoft Office SharePoint Server 2010;
- Microsoft .NET Framework 3.5;

SharePoint Release 3:

- Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007;
- Microsoft .NET Framework 3.5;

Note: This product is not compatible with SPS 2003 and WSS v2.

Browser

Microsoft Internet Explorer, Mozilla Firefox, Opera, Google Chrome.

Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto SharePoint Cross Site Lookup.

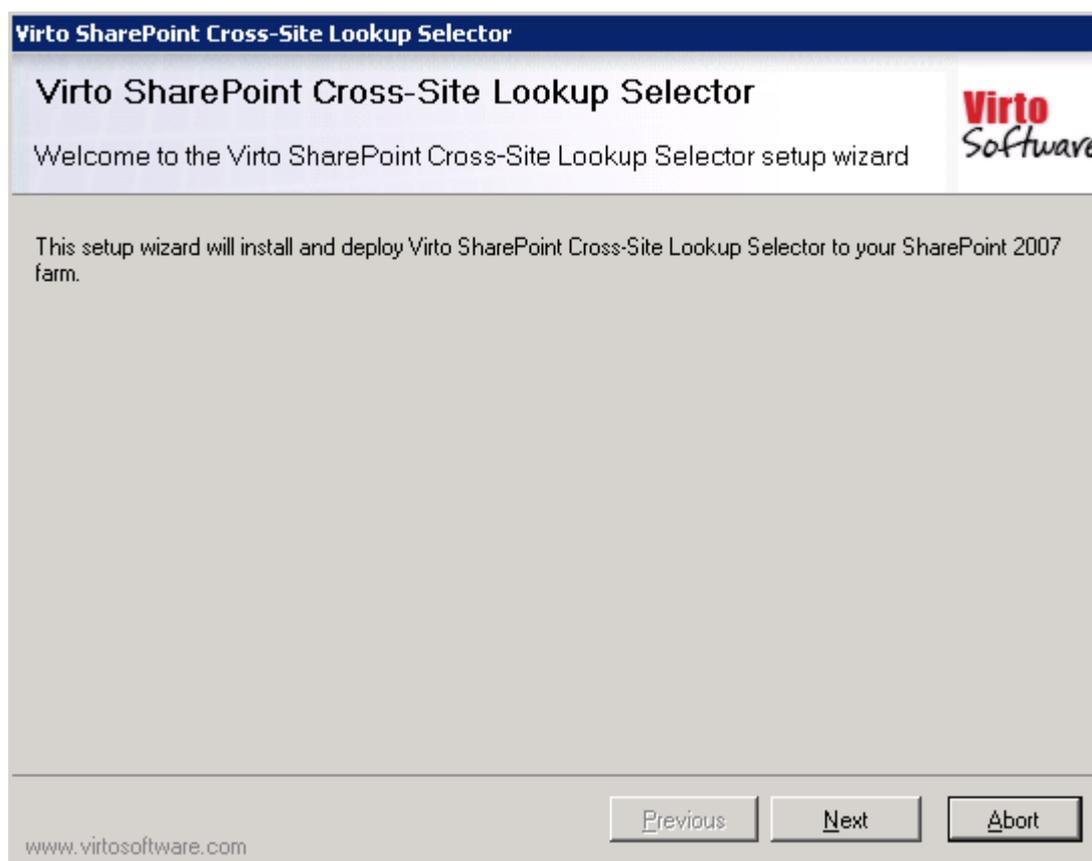
Installing Virto SharePoint Cross Site Lookup

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

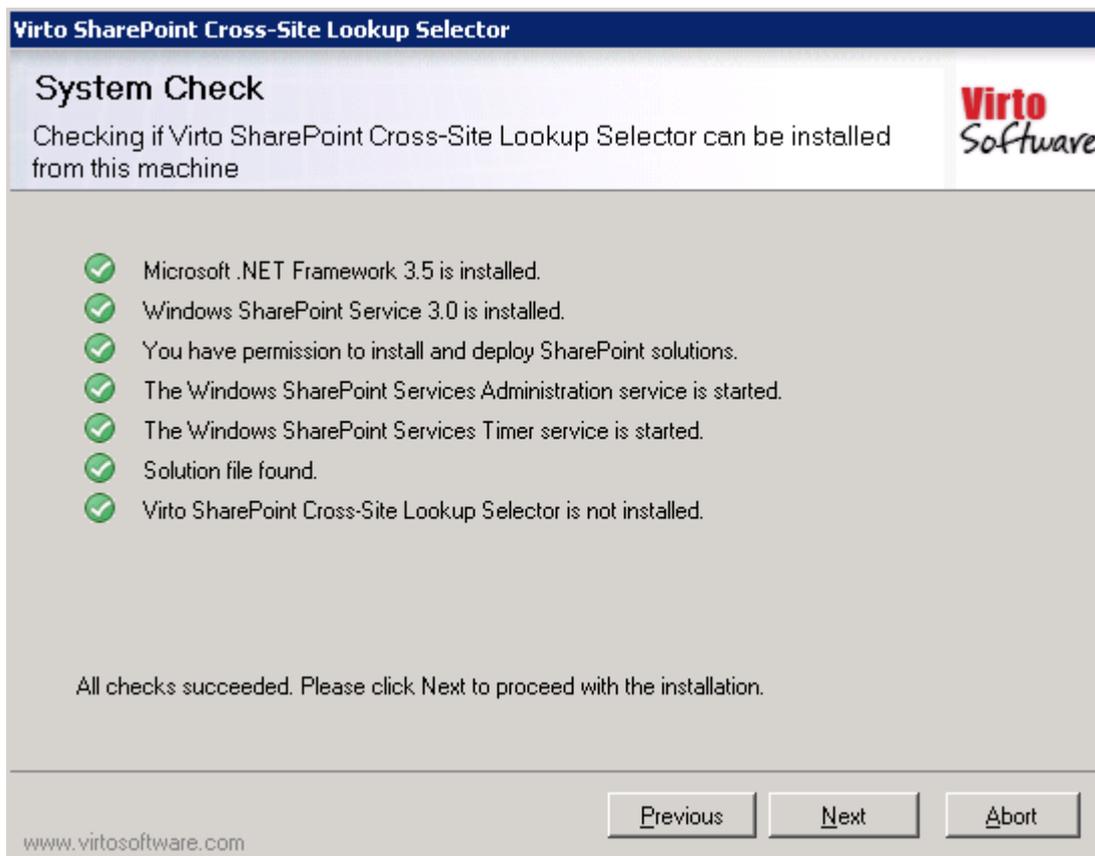
Virto SharePoint Cross Site Lookup setup program provides links to the various installation components for the calendar.

To access Virto SharePoint Cross Site Lookup Setup program download **Virto.SharePoint.20XX.CrossSiteLookupSelector.zip** file and unzip it. Run extracted Setup.exe file.

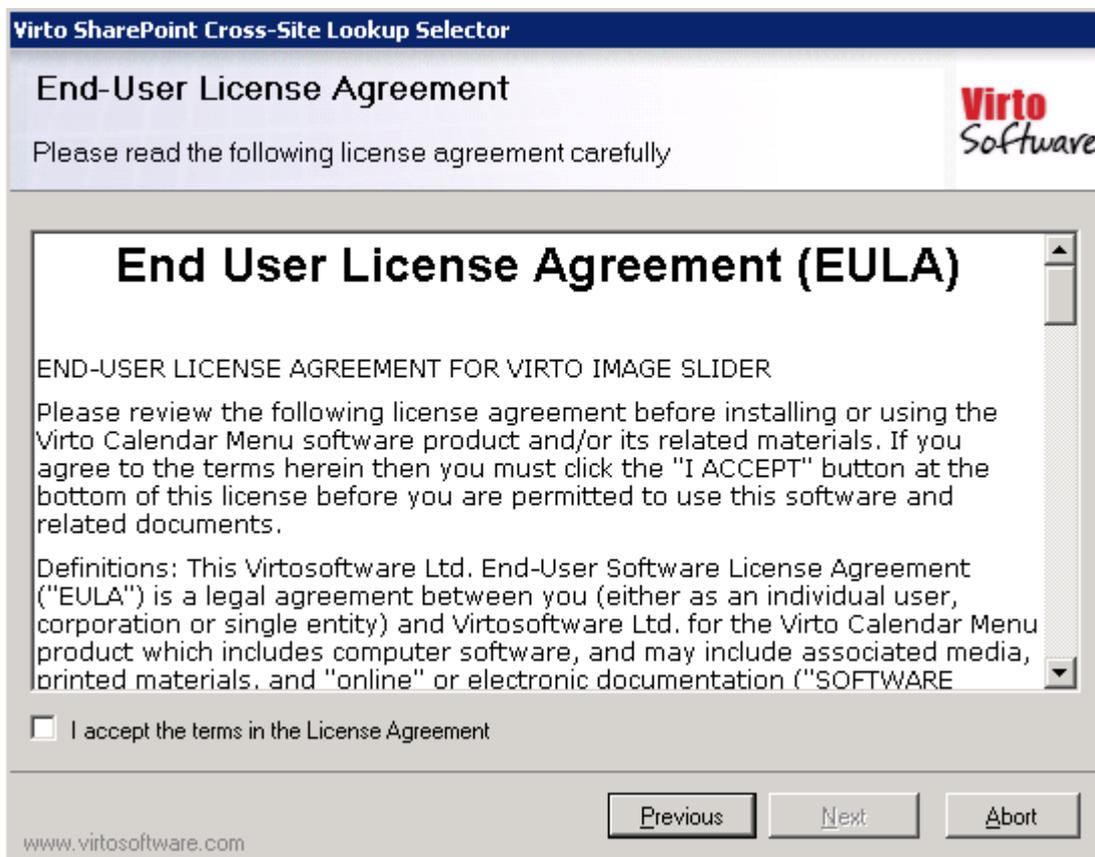
The setup wizard window will appear.



Virto Cross Site Lookup wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



Check "I accept the terms in the License Agreement" and click "Next".



Select the web application(s) where you want to install the product.

Warning: You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.

The screenshot shows a dialog box titled "Virtos SharePoint Cross-Site Lookup Selector". The main heading is "Site Collection Deployment Targets". Below the heading, it says "Please select one or more web applications / site collections". The "Virtos Software" logo is in the top right corner. Under the heading "Web Applications / Site Collections:", there is a list of three items, each with a plus sign in a square to its left and a checkbox to its right:

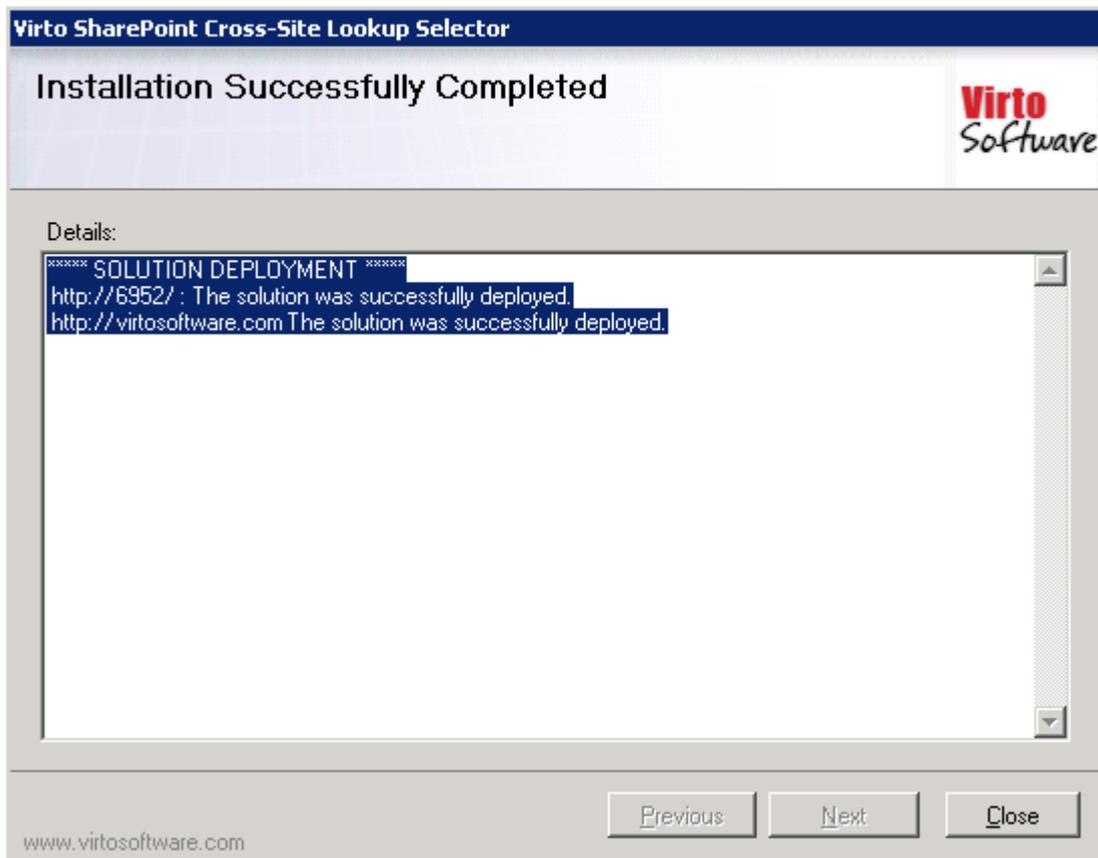
- http://7493/ (Shared Resource Provider) (2 site collections)
- http://952/ (SharePoint - 36952) (1 site collection)
- http://virtosoftware.com (SharePoint - 80) (3 site collections)

Below the list, it says "Please click the Next button to start the installation process." At the bottom, there are three buttons: "Previous", "Next", and "Abort". The website address "www.virtossoftware.com" is in the bottom left corner.

Then click "Next".

The screenshot shows the same dialog box, now in the "Installing" stage. The heading is "Installing". Below the heading, it says "Please wait while Virtos SharePoint Cross-Site Lookup Selector is installed". The "Virtos Software" logo is in the top right corner. In the center, there is a progress bar that is partially filled with a dark blue color. Below the progress bar, it says "Waiting for solution deployment job to complete. Press Abort to stop." At the bottom, there are three buttons: "Previous", "Next", and "Abort". The website address "www.virtossoftware.com" is in the bottom left corner.

Click “Close” to complete the installation.



Note: installation procedure is similar for SharePoint 2007, 2010, 2013, and 2016 versions.

License Activation

To see full instruction for successful activation of your component, please download “Virto License Manager” PDF instruction from [Downloads](#) section of our site or read it in [Wiki](#).

Upgrading Virto SharePoint Cross Site Lookup

If you already use Virto SharePoint Cross Site Lookup and need to upgrade it to the latest version, download the.zip file from <http://www.virtosoftware.com>. Unzip the file and run setup.exe.

On the step 3 check the box “Upgrade” and click “Next”.

Note: if you had activated the license while installing the previous Virto SharePoint Cross Site Lookup version, you do not need to activate it now.

Uninstalling Virto SharePoint Cross Site Lookup

To uninstall the component:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.20XX.CrossSiteLookupSelector.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click "Next".

Virto SharePoint Cross Site Lookup Feature

Virto SharePoint Cross Site Lookup feature allows SharePoint users to reference existing data in SharePoint list easily and intelligently, access list items from across your Site Collection, and add automatic duplicate removal and find-as-you-type functionality to your lookups.

Virto SharePoint Cross Site Lookup quickly cross-references existing data from a list or site within the same site collection and then applies a combination of filters to reduce the number of options presented in the dropdown menu of your lookup field.

Working with Cross-Site Lookups

When you have installed Virto SharePoint Cross Site Lookup and activated it, you need to adjust the feature to work in a proper way.

Since Virto SharePoint Cross Site lookup is supposed to work with SharePoint lists of current site collection, you need to create a list you are going to work with and adjust the feature.

Below is an example of Cross Site Lookup usage. For example, you need to aggregate information from a list of clients which are grouped by countries and cities (country may include several cities).

Country-City

[+ new item](#) or [edit this list](#)

All Items





Country ↑	Capital
Afghanistan ✖	... Kabul
Albania ✖	... Tirana
Algeria ✖	... Algiers
American Samoa (USA) ✖	... Pago Pago
Andorra ✖	... Andorra La Vella
Angola ✖	... Luanda
Anguilla (UK) ✖	... The Valley
Antigua and Barbuda ✖	... Saint Johns
Argentina ✖	... Buenos Aires
Armenia ✖	... Yerevan
Aruba (Netherlands) ✖	... Oranjestad
Australia ✖	... Canberra
Austria ✖	... Vienna
Azerbaijan ✖	... Baku

Adding New Cross-Site Lookup Columns

Go to a SharePoint site and create a list, which will contain cross-site lookup.

Clients

[+](#) new item or edit this list

All Items





✓	Title	Country	City	Client	
	Project 1	...	Russia	Vladivostok; Moscow	Raymond
	Project 2	...	Germany; France	Berlin; Lyon	Caelan

Now you need to add a column with “Cross-site Lookup Selector” type. Go to list settings and create a new column.

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

Enter the column title (country name in our case) and select “Virto Cross-Site Lookup selector” as a column type.

Basic Fields’ Parameters

Then fill out the following fields:

- 1) **Description** – description of the column.
- 2) **Source site URL** - site from the current site collection, which data will be taken from.
- 3) **Source List** – a source SharePoint list (“Country-City” list), which data will be taken from.
- 4) **Display column** – a column from the source list, that will be displayed in the lookup (for example, Country).

Add 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
- Task Outcome
- Virto Custom Mask
- Managed Metadata
- Virto Cross-Site Lookup Selector

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

Source List:

Display Column:

- Allow multiple values
- Remove duplicate items

Add a column to show each of these additional fields:

- Country
- Country (linked to item)
- Capital
- ID
- Modified
- Created
- Version

Multiple Values and Duplicate Values

Check the box “Allow multiple values” in case you need to enable multiple values in your lookup.

Check the box “Remove duplicate items” if you need to exclude duplicated items from the lookup.

Display Column:

Country ▼

Allow multiple values

Remove duplicate items

Additional Columns

Virto Cross-Site Lookup allows users to add more columns to the lookup, that will be displayed only on list item **view** form. Select required from the list and click “Add” Added column will appear in the “Show other columns” block. Use “Up” and “Down” buttons to define the order of the columns.

Show other columns:

Capital ▼

Country

Add

Up

Down

Remove

In the following example, the lookup column “Title” has additional column “Start time” from the same lookup list. This column “Title:Start time” and its value are added automatically to the item when you define the field value from depending lookup field “Title”.

⊕ new item or edit this list

All Items ... Find an item 🔍

✓	Title	Title:Start Time
1 🌿	...	
2 🌿	...	
3 🌿	...	Custom list event 3 2/18/2017 11:00 AM

Field Dependence Options

You can define field dependence to set relation between the columns. Check the box “Field dependent options” and select:

- **List filter column** (which column in this list triggers a change in the Display Column);
- **Current list trigger column** (which column in the Source List determines the values to filter on).

Field dependent options:

Make this a dependent column

Source list filter column:

Country ▼

Current list trigger column:

Country ▼

Conversion of Standard Lookup to Virto Lookup

Virto Lookup allows users to convert existing SharePoint lookups to Virto Lookups and use extended Virto features without creating new lookup.

Just click the link in “Convert” block and select an existing lookup.

Convert:

[Click here to convert an existing SharePoint Lookup column in this list to a Cross-Site Lookup Column](#)

Convert:

[Click here to convert an existing SharePoint Lookup column in this list to a Cross-Site Lookup Column](#)

Country ▼

Convert

Click “OK” to finish column adding.

Dependence can be applied to the following single value fields:

1. Single line of text
2. Choice (Drop-Down menu)
3. Lookup (Single value, Multi Value)
4. Virto Cross-Site Lookup Selector (Single value, Multi Value).

The same way you can add fields with “Cross-site Lookup Selector” 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	✓
Country	Virto Cross-Site Lookup Selector Multi	✓
City	Virto Cross-Site Lookup Selector Multi	✓
Client	Virto Cross-Site Lookup Selector	✓
Created By	Person or Group	
Modified By	Person or Group	

Now the fields are adjusted and you can use lookup option (see the next section).

Using Lookups for Data Reference

Go to the SharePoint list where you have adjusted Lookup Cross-Site selector columns and click “New”.

Clients

[+ new item](#) or [edit this list](#)

All Items





✓	Title	Country	City	Client
	Project 1	... Russia	Vladivostok; Moscow	Raymond
	Project 2	... Germany; France	Berlin; Lyon	Caelan

Title *

Country *

- Afghanistan
- Albania
- Algeria
- American Samoa (USA)
- Andorra
- Angola
- Anguilla (UK)
- Antigua and Barbuda

Add >

< Remove

City *

Add >

< Remove

Client *

Save

Cancel

We have created three lookup fields with the dependence country -> city-> client. This means that when a user adds new item to the list, he selects country and the list of cities of this country will be displayed accordingly. And when the list of cities is defined, the same happens with clients list.

Enter title of the lookup and start typing country name. The list of countries will be displayed.

Title *

Country *

<ul style="list-style-type: none"> Croatia Cuba Curacao (Netherlands) Cyprus Czech Republic D.R Congo Denmark Djibouti Dominica 	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>	<ul style="list-style-type: none"> Germany
--	---	---

Click on the required country and use arrow button to add this country to the lookup.

As you add countries to the lookup, the list of cities changes accordingly.

Title *

Country *

<ul style="list-style-type: none"> Cuba Curacao (Netherlands) Cyprus Czech Republic D.R Congo Djibouti Dominica Dominican Republic 	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>	<ul style="list-style-type: none"> Denmark Germany
--	---	--

City *

<ul style="list-style-type: none"> Berlin Copenhagen 	<input type="button" value="Add >"/> <input type="button" value="< Remove"/>	<ul style="list-style-type: none">
--	---	--

And as you select cities, the list of clients changes as well.

Click "OK" to create lookup.

Clients

[+ new item](#) or [edit this list](#)

All Items





✓	Title	Country	City	Client
	Project 1	... Russia	Vladivostok; Moscow	Raymond
	Project 2	... Germany; France	Berlin; Lyon	Caelan
	European clients ✳	... Denmark; Germany	Berlin; Copenhagen	Adam

You can view the list item to see the details.

Title	European clients
Country	Denmark; Germany
City	Berlin; Copenhagen
Client	Adam, CHARLES STREET, 415-885-2949
Country:	Denmark; Germany
Created at 6/24/2015 9:44 AM	Close
Last modified at 6/24/2015 9:44 AM	

Pay attention, if you defined additional field to be displayed (see the previous section), these fields will be displayed in the list item view mode.

Show other columns:

[Add](#)

Address
 Phone

[Up](#)

[Down](#)

[Remove](#)

This way you can create lookups and set references between SharePoint list columns.

Title European clients
 Country Denmark; Germany
 City Berlin; Copenhagen
 Client Adam, CHARLES STREET, 415-885-2949

Country: Denmark; Germany

Created at 6/24/2015 9:44 AM

Last modified at 6/24/2015 9:44 AM

Close

Editing Fields in Datasheet View (only for SharePoint 2007 and 2010)

Virto Cross Site Lookup allows editing fields in datasheet view. Switch to Datasheet View.

The screenshot shows the SharePoint 2010 ribbon with the 'List Tools' tab selected. The 'View Format' group has 'Standard View' and 'Datasheet View' (highlighted in yellow). The 'Manage Views' group has 'Current View' set to 'All Items'. The 'Share & Track' group has 'E-mail a Link', 'RSS Feed', and 'Sync to SharePoint Workspace'. The 'Business Intelligence' group is visible on the left. The table below shows the following data:

	Title	Country	Country:City	City
	Test	Armenia	Yerevan	Yerevan
	teste	Portugal	Lisbon	Lisbon
*				

Make changes to required fields right on the page without moving to edit item window.

	Title	Country	Country:City	City
	Test	Armenia	Yerevan	Yerevan
	teste	Portugal	Lisbon	Lisbon
*				

After editing dependencies will not work as before.

Version Release History

Release Date	Version	Description
02/15/2016	v.3.1.2	[-] Fixed "Group By" field view [-] Virto Bulk Edit support
09/04/2015	v.3.0.2	[-] Fixed: wrong site url for current zone
09/05/2013	v.3.0.1	[+] New license manager
08/02/2012	v.2.0.0	[+] Added support for editing in Datasheet View [+] Increasing performance
08/13/2010	v.1.0.0	First Public Release