

# Virto Related Items Field Type for Microsoft SharePoint Release 1.0.0

# **User and Installation Guide**



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# Virto SharePoint Related Items Field Type

# **Features List**

Feature	Version
Create related items in lookup of list from current site collection	1.0
Multiselection can be applied for lookup fields	1.0
Advanced filter options	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 to set dependence between lookup fields	1.0

# System/Developer Requirements

### **Operating System**

Microsoft Windows Server 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;

#### 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 Related Items Field Type solution.

### Installing Virto SharePoint Related Items Field Type

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.

The Virto SharePoint Related Items Field Type setup program provides links to the various installation components for the calendar.

To access Virto SharePoint Related Items Field Type Setup program download **Virto.SharePoint.20XX.RelatedItemsFiledType.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.

Virto SharePoint Cross-Site Lookup Selector						
Virto SharePoint Cross-Site Lookup Selector Welcome to the Virto SharePoint Cross-Site Lookup Selector setup wizard	<b>Virto</b> Softwave					
This setup wizard will install and deploy Virto SharePoint Cross-Site Lookup Selector to your Sha farm.	arePoint 2007					
www.virtosoftware.com	Abort					

Virto Related Items 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".

Syster	m Check	Virto
	g if Virto SharePoint Cross-Site Lookup Selector can be installed machine	Software
0	Microsoft .NET Framework 3.5 is installed.	
	Windows SharePoint Service 3.0 is installed.	
	You have permission to install and deploy SharePoint solutions.	
	The Windows SharePoint Services Administration service is started.	
	The Windows SharePoint Services Timer service is started.	
	Solution file found.	
$\bigcirc$	Virto SharePoint Cross-Site Lookup Selector is not installed.	
All ch	ecks succeeded. Please click Next to proceed with the installation.	
	Previous Next	Abort

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

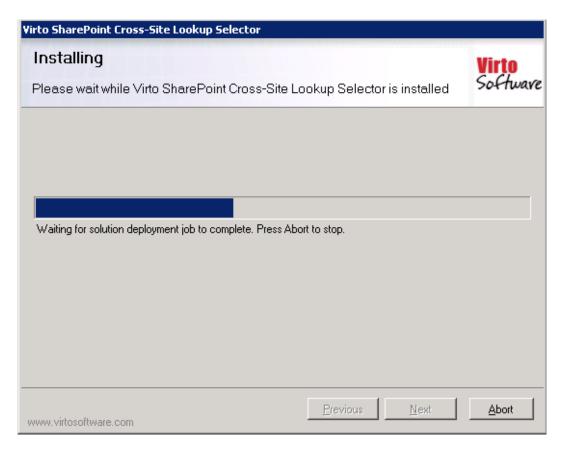
End-User License Agreement		Virto
Please read the following license agreemer	nt carefully	Software
End User License A	Agreement (I	EULA)
END-USER LICENSE AGREEMENT FOR VIR	TO IMAGE SLIDER	
Please review the following license agree Virto Calendar Menu software product ar agree to the terms herein then you must bottom of this license before you are per related documents.	nd/or its related mate t click the "I ACCEPT"	rials. If you button at the
Definitions: This Virtosoftware Ltd. End-U ("EULA") is a legal agreement between y corporation or single entity) and Virtosof product which includes computer softwar printed materials. and "online" or electro	/ou (either as an indiv tware Ltd. for the Virt re, and may include as	idual user, o Calendar Menu ssociated media,
I accept the terms in the License Agreement		

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.

Virto SharePoint Cross-Site Lookup Selector	
Site Collection Deployment Targets Please select one or more web applications / site collections	<b>Virto</b> Softwave
Web Applications / Site Collections:	
<ul> <li></li></ul>	
Please click the Next button to start the installation process.	
www.virtosoftware.com	Abort

Then click "Next".



Click "Close" to complete the installation.

Virto SharePoint Cross-Site Lookup Selector			
Installation Successfully Complete	d		<mark>Virto</mark> Softwave
Details: ***** SOLUTION DEPLOYMENT ***** http://6952/ : The solution was successfully deployed. http://virtosoftware.com The solution was successfully de	eployed.		×
www.virtosoftware.com	Previous	<u>N</u> ext	<u>C</u> lose

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

#### **License Activation**

To see full instruction for successful activation of your component, please read our blog.

#### Upgrading Virto SharePoint Related Items

If you already use Virto SharePoint Related Items and need to upgrade it to the latest version, download the.zip file from <u>http://www.virtosoftware.com</u>. 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 Related Items version, you do not need to activate it now.

### Uninstalling Virto Related Items

To uninstall the component:

- 1. Double click the Setup.exe extracted from downloaded Virto.SharePoint.20XX.RelatedItemsFiledType.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 Related Items Field Type Feature

Virto SharePoint Related Items Field Type feature allows SharePoint users to reference existing lookup data in a SharePoint list within the same site collection and access child lists' items to edit, create, and delete in a parent list.

# How to connect lists with SharePoint Related Items Field Type feature

When you have installed Virto SharePoint Related Items Field Type and activated it, you need to adjust the feature.

Since Virto SharePoint Related Items Field Type is supposed to work with SharePoint lists of current site collection, you have to:

- create a list you are going to work with, add lookup column and adjust the feature or

- add a lookup column to an existing list and adjust the feature.

For example, you need to aggregate information from distinct personal lists (eg. "John's expenses") in one list of employee's expenses ("Expenses").

# John's expenses

**new item** or edit this list

 All Items
 ···

 Y Title
 Price Month
 Coffee \*\*
 ···
 100 August

Every child list should have the lookup column pointed to the parent list "Expenses".

The following example contains the lookup in "John's expenses" list:

Name and Type	Column come:
Type a name for this column.	Column name: Expenses
	The type of information in this column is:
	Lookup
Additional Column Settings	Description
Specify detailed options for the type of information you selected.	Description:
	Require that this column contains information:
	🔘 Yes 💿 No
	Enforce unique values:
	🔘 Yes 💿 No
	Get information from:
	Expenses

On the following picture, I have created in parent "Expenses" list a new "Virtosoftware Related items"

# Settings + Create Column ®

#### Name and Type

lists.

and select John

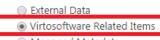
Type a name for this column, and select the type of information you want to store in the column.

column named "John".

#### Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Ochoice (menu to choose from)
- 🔘 Number (1, 1.0, 100)
- Ourrency (\$, ¥, €)
- Oate and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- O Hyperlink or Picture
- Calculated (calculation based on other columns)
- Task Outcome



Managed Metadata

Scroll down to the bottom of column creation form to the "Related Items Definition" settings.

Select the child list, a linked lookup column and define other options if needed (see the next chapter for more details).

The default settings look like follows:

Specify detailed options for the Related Items Field.

Related Items Definitions

List:	John's expenses	•
Content type:	Item 🔻	
View:	All Items 🔻	
Show view sel	ector	
Linked Column:	Expenses *	
Items per page:	Unlimited *	
lew item definition:	5	
Show Ribbon		
🗷 Allow adding i	tems	
Allow adding	new child items ir	Display
New item label:	Add entry	

Save the column.

Now, the column "John" in list "Expenses" represents the personal expenses from child column.

# Expenses

(+) nev	v item 🤉	or <mark>edit</mark> this list			
All Items		Find an item	Q		
✓ Titl	e			John	
Au	gust 🗱			Close	
Title	Price		Start date		End date
Coffee	100		8/2/2017		8/18/2017
Fuel	400		8/4/2017		8/11/2017
Se	pt 🗱			Click for details	

# **Related Items Field Type Settings**

When you add the "Virtosoftware Related items" column, you have to define Related Items Definitions) settings.

The default view looks like following example:

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	12	
Related Items Definitions		
Specify detailed options for the Related Items Field.		
	Related list definitio	ins
	List:	John's expenses 🔻
	Content type:	Item 🔻
	View:	All Items 🔻
	Show view sel	lector
	Linked Column:	Expenses *
	Items per page:	Unlimited *
	New item definition	5
	Show Ribbon	
	🗹 Allow adding	items
	Allow adding	new child items in Display mode of parent item
	New item label:	Add entry

You should select the child list, choose content type to display and define a view.

The checkbox "Show view selector" allow you to add the view drop down menu to list item's Edit form.

		A01 - Item	1			
✓ EDIT LINKS		EDIT	👝 💥 Cut		ABC	
• new item or edit this list		Save Cance	Copy	Delete Attach Item File	Spelling Spelling	
All Items ···· Find an item	م		ltem1	•		
✓ Item1			/iew: All Items  Title All Items	Choice	Num	Date
Title Picture Coffee	Choice Enter Choice #1	c	DataSheet Coffee View2	Enter Choice #1	77	7/18/2017

The "Linked column" field contains the lookup column name pointed to the parent list.

"Items per page number" setting allows you to define the number of items (5, 10, 25, 50, 100, or unlimited) displayed on the View and Edit forms.

Linked Column:	Expenses 🔻	
Items per page:	5 🔻	]
New item definitions	Unlimited	
	5	
Show Ribbon	10	
🗹 Allow adding ite	25	
Allow adding w	50	
Allow adding w	100	_
Allowed Research and a state	A al al a catalon o	-

For example, I selected 5 items per page. Other column's items are available to view on the next section with 5 next items by clicking on the arrow.

# Expenses

🕀 new item	or <mark>edit</mark> this list			
All Items	Find an item	Q		
✓ Title			John	
August 🕊		***	Close	
Title Price		Start date		End date
Coffee 100		8/2/2017		8/18/2017
Fuel 400		8/4/2017		8/11/2017
2				
3				
4				
1-5 🕨				
Sept 🗱		•••	Click for details	

#### The next setting allows you to define the new item form appearance.

New item definitions

Show Ribbon

Allow adding items

Allow adding new child items in Display mode of parent item

Add entry

New item label:

It is possible to remove ribbon from the items Create and Edit forms, using checkbox "Show ribbon".

On this screenshot, the ribbon is disabled.

Title *		
John	There are no items to show in this view.	
	Add entry	
	Save Cancel	
John's exp	enses - New Item	×
Title *		
Price		
Start date		
End date		
	Save Cancel	

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You can enable or disable the ability to add new items to child list.

Other option is enable/disable ability to add new items to a child list right from the parent list.

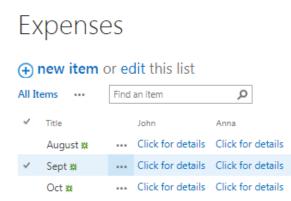
It is also possible to define text displayed on "Add new item" link in the parent list, when you allow to add new items.

New item definition	ons	
🗹 Show Ribbo	n	
🗹 Allow addin	ig items	
🗹 Allow addin	g new child items in Display mode of parent item	
New item label	: Add entry	
The text will be app	olied to form. Sept	
John	There are no items to show in this view.	
	Add entry	
		Close

Do not forget to save the settings to apply all changes to lists.

## **Related Items Field Type Usage**

In the following example, you can see the parent list "Expenses" with 2 columns, representing the data from 2 child lists "John's expenses" and "Anna's expenses".



#### Display

When you click on the link "Click for details" from corresponding column, the related items from the child list are displayed.

• new item or edit this list							
All Items •••	Find	an item	Q				
✓ Title		John	Anna				
<ul> <li>August #</li> </ul>		Click for details	Close				
Anna Title Price Tea 50							
Sept <b>*</b> Oct <b>*</b>		Click for details Click for details					

On this picture, both columns are opened. The dividers with column names distinguish the data from each column.

Expens	es		
+) new item	or edit this list		
All Items 🛛 •••	Find an item	Q	
✓ Title		John	Anna
<ul> <li>August #</li> </ul>		Close	Close
Title Price Tea 50			
John			
Title Price		Start date	End date
Coffee 100		8/2/2017	8/18/2017
Fuel 400		8/4/2017	8/11/2017
2			
3			
4			
1-5 🕨			
Sept #	•••	Click for details	Click for details
Oct ¥	•••	Click for details	Click for details

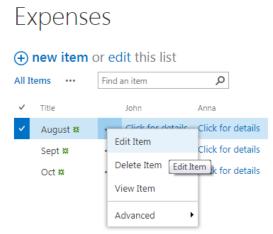
Click on the item name to view details or hover the mouse point on item name to select an action.

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Expe	nses			
🕀 new i	<b>tem</b> or edit th	is list		
All Items	••• Find an item	Q		
✓ Title		John		Anna
Augus	st ¥	••• Close		Close
	ohn			
_	Price		t date /2017	End date 8/18/2017
<u>conce</u>				
Fuel	400	8/4	/2017	8/11/2017
	John ——		-	
Title	Price			
Coffee	NEW 100			
Fuel	View Item			
2	Edit Item			
3	Workflows			
4	Manage P	ermissions		
1-5 🕨	Delete Iter	n	_	

#### Edit

When you open a parent's list item in Edit form, you can edit or delete related items from this mode.



You can edit items by clicking on their names or by clicking on the edit icon.

			17
Delete Attach Spe	BC ding		
Title *	August		John's expenses - Edit Item 🗙 🗙
John	View: All Items  Title Price Start dat Coffee 100 8/2/201 Fuel 400 8/4/201 2 3 4 1-5	7 8/18/2017 🔀 🗙	EDT Save Cancel Paste Copy Save Cancel Clipboard Actions Spelling Title * Coffee Price 100 Start date 8/2/2017
Anna	Add entry Title Price Tea 50	Save Cancel	End date 8/18/2017 III Save Cancel

#### Add new items

You can add new items from parent list directly to the child lists.

It is possible to enable or disable ability to add new items for each list. This option is enabled for list "John's expenses" and disabled for list "Anna's expenses".

Also, you can define text for the link to new item creation mode.

Title *	August					1. her		N 1					×
John	View: All	Items 🔻				Jonn	s expe	nses - New Ite	em				
	Title	Price	Start date	End date		EDI							
	Coffee	100	8/2/2017	8/18/2017	×		x	Cut	0-S	ABC			
	Fuel	400	8/4/2017	8/11/2017	×	Save		Paste Copy	Attach File	Spelling			
	2				×	6	ommit	Clipboard	Actions	Spelling			
	3				$\mathbb{Z}^{\times}$	Title	e -						
	4				$\mathbb{Z}^{\times}$	Price							
	1-5 🕨					Start	date						
	Add entry	]				End	lato						
Anna	Title	Price				Enu (	ate			0			
	Tea	50		5	×						Save	Cancel	
				Save	Cancel								

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# Version Release History

Release Date	Version	Description
08/07/2017	v.1.0.0	First Public Release