Virto Related Items Field Type
for Microsoft SharePoint
Release 1.0.0

User and Installation Guide

Table of Contents

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.

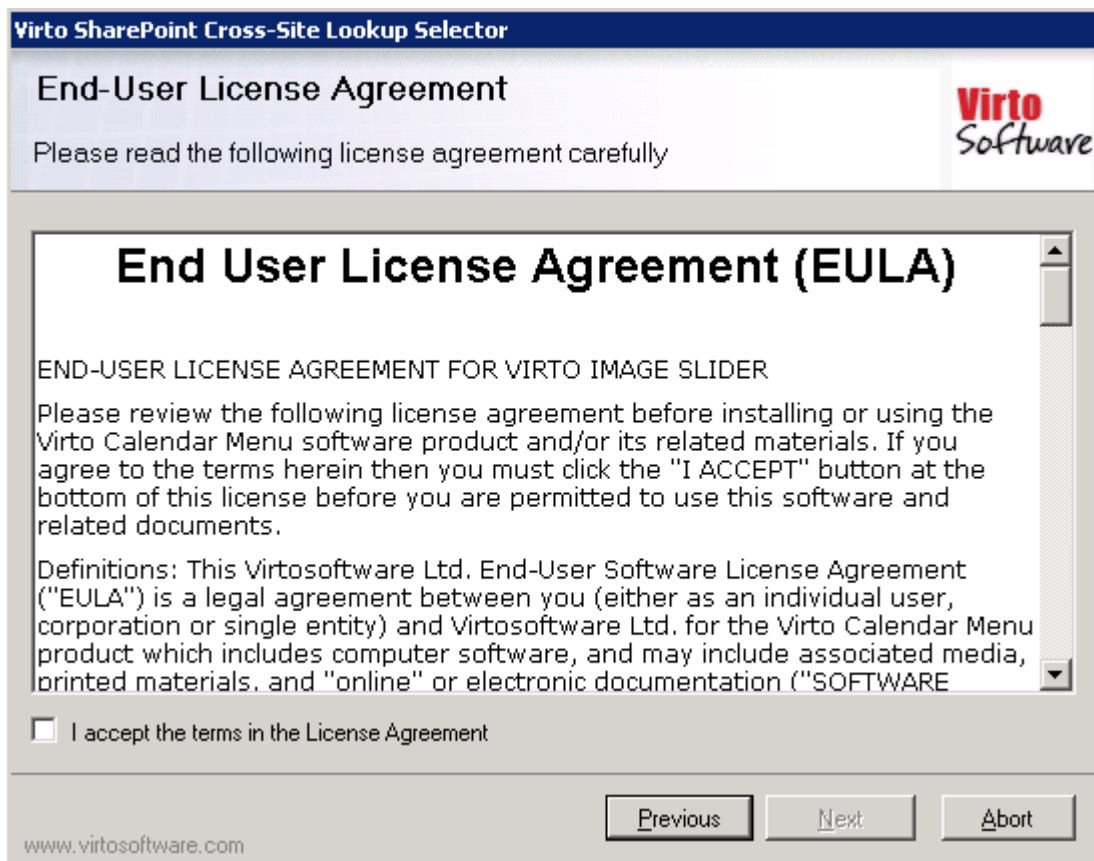The setup wizard window will appear.
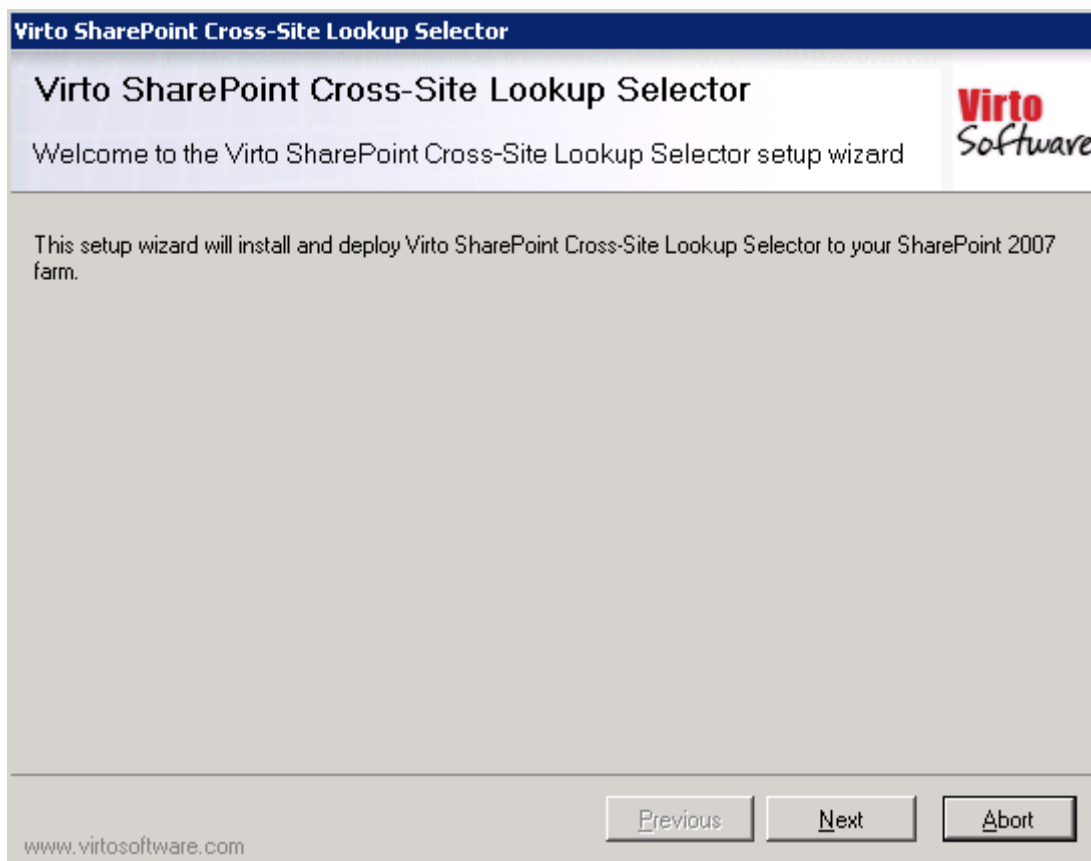
Virto Related Items wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".
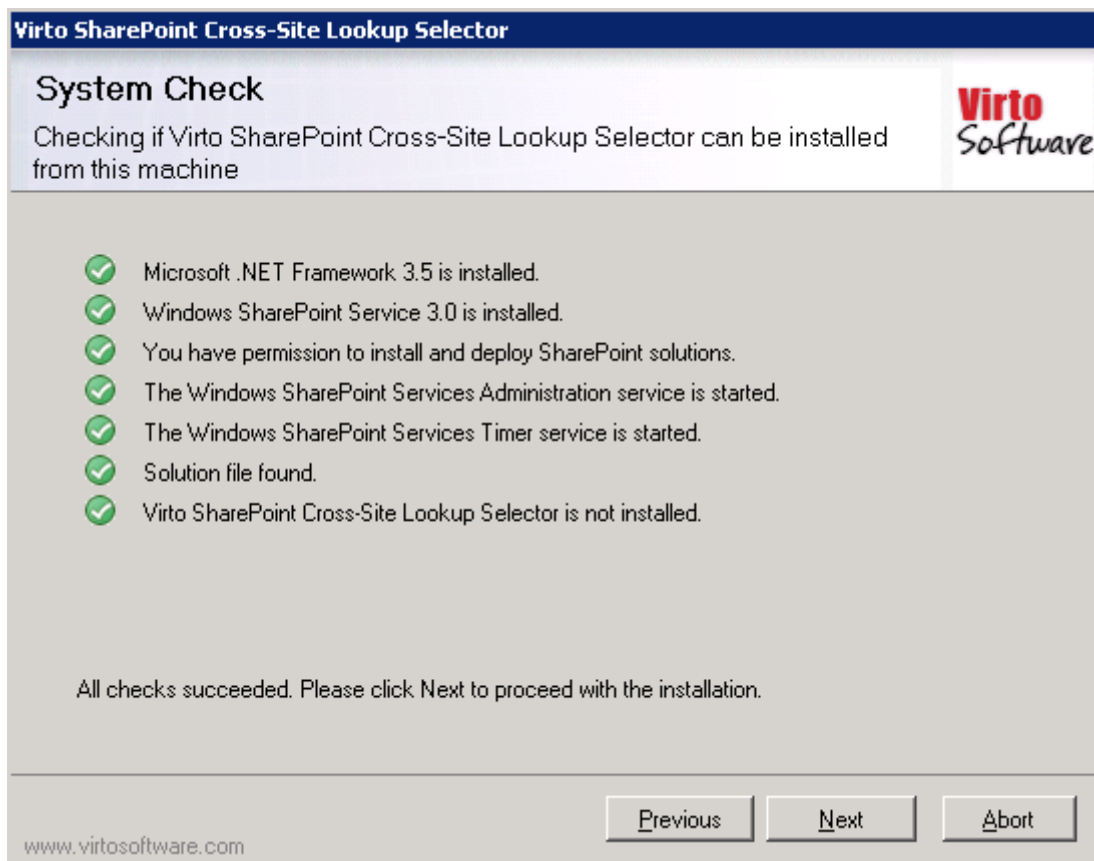
Check "I accept the terms in the License Agreement" and click "Next".

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.*

Then click "Next".

Click "Close" to complete the installation.
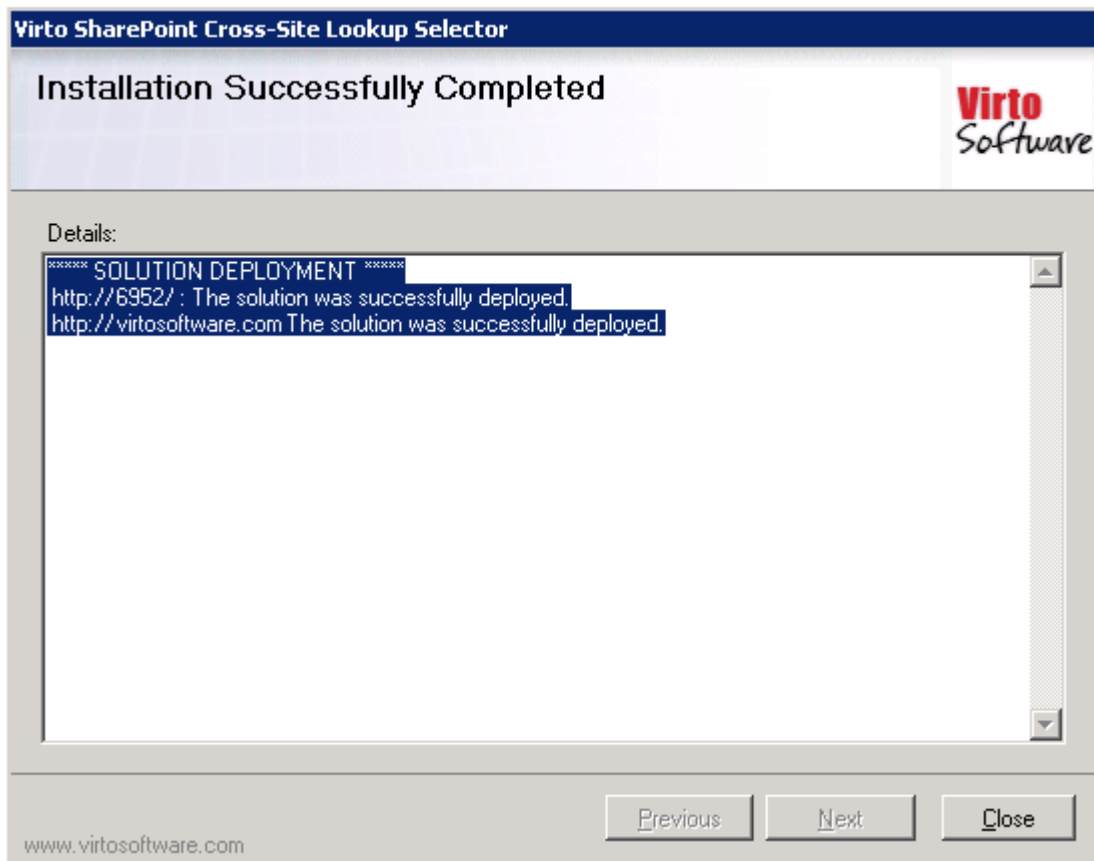
Note: *installation procedure is similar for SharePoint 2013 and 2016 versions.*

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 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 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 ···	Find an item 🔍		
✓	Title	Price	Month
	Coffee ❋ ···	100	August
	Fuel ❋ ···	400	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

Type a name for this column.

Column name:

Expenses

The type of information in this column is:

Lookup

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

Get information from:

Expenses

The parent list "Expenses" should contain "Virtosoftware Related items" columns pointed to all child lists.

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

Settings ▸ 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:

John

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)
○ Task Outcome
○ External Data
◉ Virtosoftware Related Items
○ 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:

⊟ Related Items Definitions
Specify detailed options for the Related Items Field.

Related list definitions

List:	John's expenses ▾
Content type:	Item ▾
View:	All Items ▾
	☐ Show view selector
Linked Column:	Expenses ▾
Items per page:	Unlimited ▾

New item definitions

☑ Show Ribbon

☑ Allow adding items

☐ Allow adding new child items in Display mode of parent item

New item label:	Add entry

Save the column.

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

Expenses

⊕ **new item** or edit this list

All Items   ⋯   Find an item   🔍

✓	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

Sept ✳		⋯	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:

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.

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.

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 edit this list

All Items   ••• | Find an item   🔍 |

✓   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

New item label: | Add entry |

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 expenses - New Item   ✕

Title * | | _____ |

Price | _____ |

Start date | _____ | 📅

End date | _____ | 📅

                                | Save | | Cancel |

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 definitions
☑ Show Ribbon
☑ Allow adding items
☑ Allow adding new child items in Display mode of parent item
New item label: Add entry

The text will be applied to form.

Title   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".

Expenses

⊕ new item or edit this list

All Items   ···   Find an item   🔍

✓   Title   John   Anna
    August ✷   ··· Click for details   Click for details
✓   Sept ✷   ··· Click for details   Click for details
    Oct ✷   ··· Click for details   Click for details

Display

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

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

Expenses

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

Expenses

⊕ **new item** or edit this list

All Items ··· | Find an item 🔍

✓	Title		John		Anna
	August ❄	···	Close		Close

John

Title	Price		Start date	End date
Coffee ▾	100		8/2/2017	8/18/2017
Fuel	400		8/4/2017	8/11/2017

John

Title		Price
Coffee 🔳NEW		100
Fuel		
2		
3		
4		
1-5 ▸		

Menu:
- View Item
- Edit Item
- Workflows
- Manage Permissions
- Delete Item

Edit

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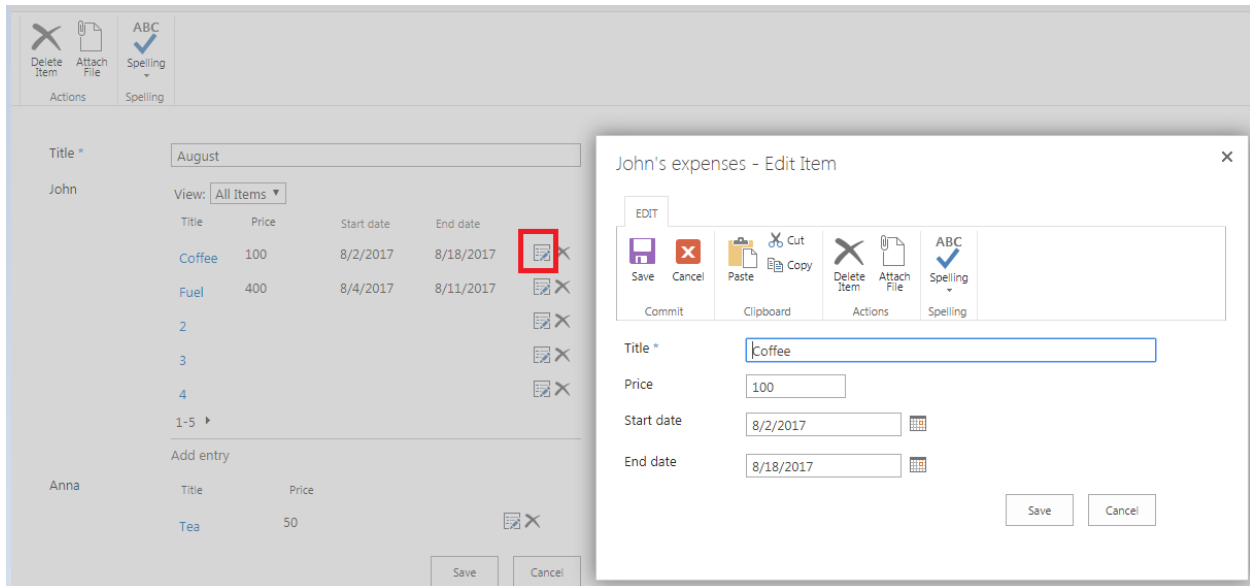
Expenses

⊕ **new item** or edit this list

All Items ··· | Find an item 🔍

✓	Title		John	Anna
✓	August ❄	·	Click for details	Click for details
	Sept ❄	·	Click for details
	Oct ❄	·	k for details

Menu:
- Edit Item
- Delete Item | Edit Item
- View Item
- Advanced ▸

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

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.
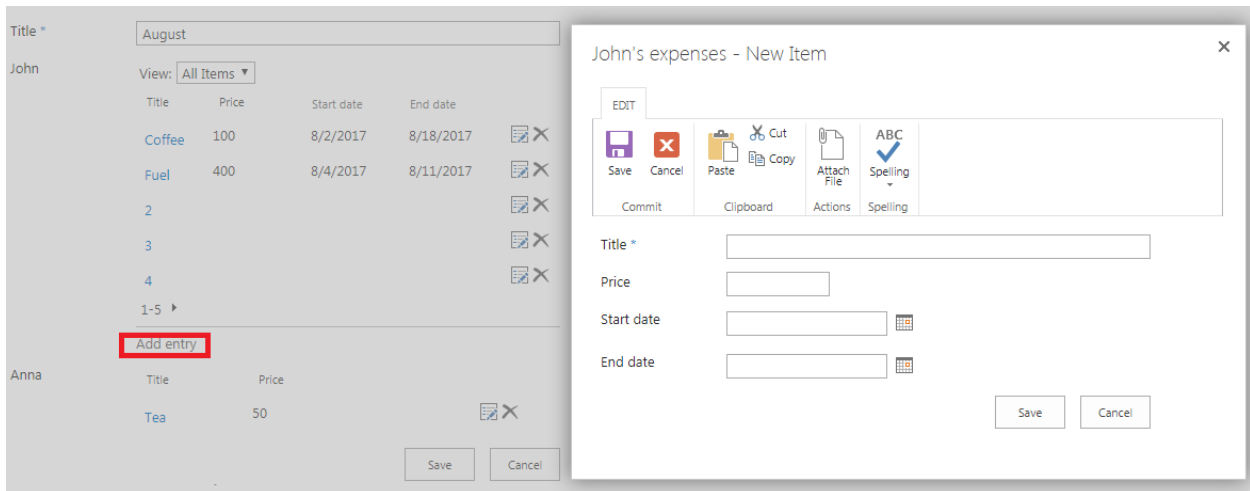
Version Release History

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