

Forms & Attributes – Creating Lookup-type Extended Attributes with Parent/Child Relationships

Question:

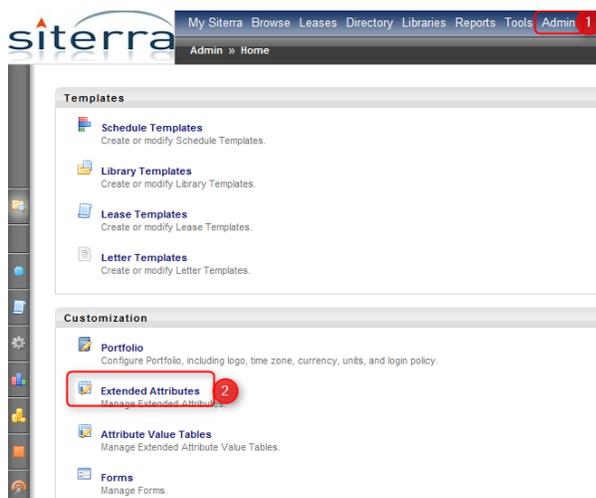
I am creating multiple Lookup Extended Attributes. Most of them will have the same values, but for different objects. Is there an easier way to add the values so that I do not have to type them multiple times?

Answer:

Siterra has an available feature within Extended Attribute's Lookup type (dropdown lists) that allows for a Parent/Child relationships. This allows the user to create a Parent Lookup EA, and then subsequently create the Child EAs across multiple object types that will then have all the same drop down values as its Parent.

Creating the Parent Lookup EA

Begin by navigating to "Admin" (1) and then select "Extended Attributes" (2) under the Customization section.



First step is to create the parent lookup attribute. This is where the Child Lookup Attributes will be able to leverage values from.

Navigate to the object type where you want the Attributes to appear. For this example “Project” (3) is selected.

Admin

Admin Home | Templates | Customization

Objects

Name ^	
Antenna	13
Asset	18
Documents	2
Hub	14
Incident	3
Leases	24
Payments	8
Project (3)	43
Property	193
Search Ring	24
Task	39
Unit	4
Vendor	1

Next, select “Add” (4) to expand a new section.

Object

Name: SMS Project

Sub Type: - Not Selected

Extended Attributes

+ Add (4)

	Name	Required?	Field Type
<input type="checkbox"/>	Project Custom Field A		Number
<input type="checkbox"/>	Project Notes		Large Text
<input type="checkbox"/>	Project Status		Lookup
<input type="checkbox"/>	Project Manager		Object Picker
<input type="checkbox"/>	Project Type A Date		Date

In the new section, name the EA and make sure the Field Type is “Lookup” (5). You may also select whether the attribute will be required (6), reportable (7), or searchable (8) using the indicated checkboxes.

The next step is to set the EA a Parent-type and add values. Select the “Set as Parent” (9) to designate this EA as a Parent. Then enter values into the “Value” (10) box and click “Add” (11) to create them. When all values are assigned, click “Submit” (12) to save changes.

After clicking “Submit”, the first step is done. You now have a Parent Lookup EA. Next, you will create the Child Lookup EA and tie it to the new Parent.

Creating the Child Lookup EA

First navigate back to the Extended Attributes screen as described in the first section, and select the object type for the Child Lookup EA. Then, like before, click “Add” (1) to create another new attribute.

On the child EA the Field type must be “Lookup” (2), just like the Parent. Next, click “Link to Parent” (3). This will make it a Child attribute. A new drop down will populate. Select the Parent EA from the list that

you want to pull values from. The values from the parent will then appear in the “Options” (4) list. Click “Submit” to save changes (5).

*NOTE: Child lookup attributes can pull over values from *any*Parent Lookup EA, even if the parent is on a different object!*

The screenshot shows the 'Extended Attributes' configuration interface. It includes the following elements:

- 1:** An 'Add' button with a plus icon in the top left corner.
- 2:** A dropdown menu for 'Field Type' set to 'Lookup'.
- 3:** Radio buttons for 'Relationship' with 'Link to Parent' selected.
- 4:** A dropdown menu for 'Parent Attribute' set to 'TEST - Parent'.
- 5:** A 'Submit' button with a green checkmark icon at the bottom right.

Other visible fields include: Name (TEST - Child), Custom Grid header (TEST - Child), Required?, Reportable?, and Searchable? checkboxes; a Comments text area; Default Value (One, Two, Three, Four, Five); and Prefix/Suffix text boxes.

This process can be repeated for each object type Extended Attribute as needed.