BOOST
SOLUTIONS

Lookup Tracker 1.0

User Guide

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Contents

1. Product Introduction

SharePoint Lookup Tracker is a tool that assists you to summarize information related to an item in a list. It provides a page to display not only all items one item looks up from, but also all items which look up information from this item. A "Related Information" link displays all connected information on the item.

This user guide will instruct and guide users to configure and use Lookup Tracker on your SharePoint environment.

For the latest version of this user guide or other user guides, please visit:

https://www.boostsolutions.com/download-documentation.html

2. Installation

2.1 Product Files

After you download and unzip the Lookup Tracker zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Lookup Tracker_V1_User Guide.pdf	User guide for Lookup Tracker in PDF format.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file containing the configuration information for the installer.
Solutions\Foundtion\ BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundtion\ BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Foundtion\Install.config	A file containing the configuration information for the installer.
Solutions\LookupBoost\BoostSolutions. LookupTrackerSetup15.1.wsp	A SharePoint solution package containing Lookup Tracker files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\LookupBoost\BoostSolutions. LookupTrackerSetup16.1.wsp	A SharePoint solution package containing Cascaded Lookup files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\LookupBoost\ Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Lookup Tracker, ensure your system meets the following requirements:

SharePoint Server Subscription Edition

Operating System	Microsoft Windows Server 2019 Standard or Datacenter Microsoft Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Microsoft Windows Server 2016 Standard or Datacenter Microsoft Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 and above Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

| Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 or greater Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2013

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or greater Microsoft Edge Mozilla Firefox Google Chrome

2.3 Installation

Follow these steps to install Lookup Tracker on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer**.
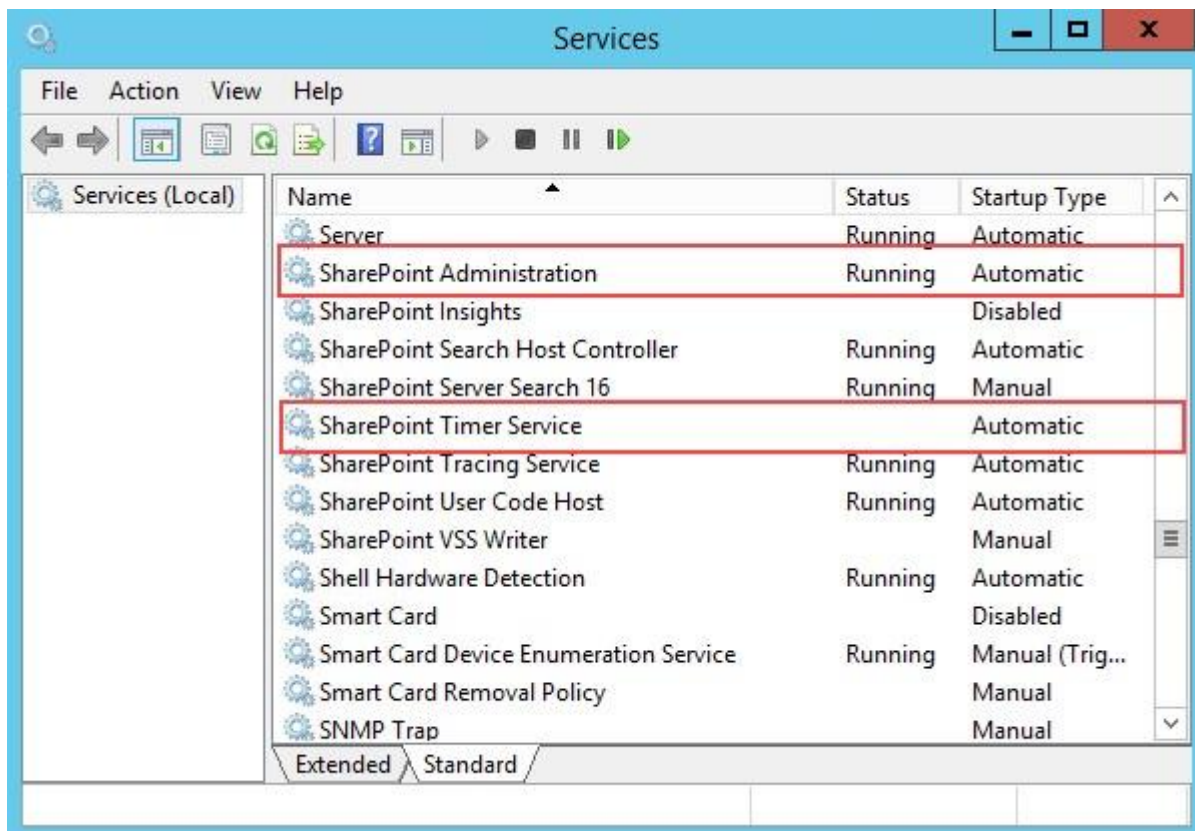
Lookup Tracker must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration → System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Lookup Tracker on SharePoint server.

a. Download the zip file (*.zip) of the product of your choice from the BoostSolutions website, then extract the file.

b. Open the created folder and run the **Setup.exe** file.

> **Note** If you cannot run the setup file, please right click the Setup.exe file and choose Run as administrator.

c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.

d. Review and accept the End-User License Agreement and click **Next**.

e. In the Web Application Deployment Targets, select the web applications you are going to install and click **Next**.

> **Note** If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

f. Upon completion of the installation, details are displayed showing which web applications you product has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of our product and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall the product, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Lookup Tracker in SharePoint 2016 by using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Lookup Tracker to SharePoint servers.

a. Extract the files from the product zip pack to a folder on one SharePoint server.

b. Open a command prompt and make sure your path is set with the SharePoint bin directory.

c. Add the solution files to SharePoint in the STSADM command line tool.

> *stsadm -o addsolution -filename BoostSolutions.LookupTrackerSetup16.1.wsp*
>
> *stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp*

d. Deploy the added solution with the following command:

> *stsadm -o deploysolution -name BoostSolutions.LookupTrackerSetup16.1.wsp -allowgacdeployment –url [virtual server url] –immediate*
>
> *stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.wsp -allowgacdeployment –url [virtual server url] –immediate*

e. Wait for the deployment to complete. Check the final status of the deployment with this command:

> *stsadm -o displaysolution -name BoostSolutions.LookupTrackerSetup16.1.wsp*
>
> *stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp*

The result should contain a <Deployed> parameter for which the value is TRUE.

f. In the STSADM tool, activate the features.

> *stsadm -o activatefeature -name Brandysoft.SharePoint.LookupBoost –url [site collection url] – force*

To remove Lookup Tracker from SharePoint servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.LookupTrackerSetup16.1.wsp -immediate -url [virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.LookupTrackerSetup16.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.LookupTrackerSetup16.1.wsp

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If you are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

a. Removal is initiated with the following command:

stsadm -o retractsolution -name BoostSolutions.FoundationSetup16.1.wsp –immediate –url [virtual server url]

b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

c. Remove the solution from the SharePoint solutions storage:

stsadm -o deletesolution -name BoostSolutions.FoundationSetup16.1.wsp

2.7 Feature Activation

Activate Lookup Tracker's feature in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

a. Select Settings and then select **Site Settings**.

b. Under **Site Collection Administration** click **Site collection features**.

c. Find the application feature and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.

3. How to Use Lookup Tracker

Lookup Tracker is fairly simple and easy to use. We will use the following scenario to show you how to use this product. You must have at least Design permission level to use this product.

There are three lists: **Customer**, **Sales** and **Order**.

In **Customer** List, column **Sales** looks up information from column **Saler** of **Sales** list, and column **Order No.** looks up information from column **No.** of Order list.

Lookup Column	Get information from list	Get information from column
Sales	Sales	Saler
Order.No	Order	No.

In **Sales** list, column **Order No.** looks up information from column **No.** of **Order** list.

Sales

⊕ **new item** or edit this list

All Items ⋯ | Find an item 🔍

✓	Saler		Expire	Order No.
	Tom	⋯	7/31/2020	20180927-0001
	Bill	⋯	5/31/2020	20180928-0001
	Hans	⋯	9/10/2020	20180928-0002
	Henry	⋯	4/28/2020	20180929-0001
	Cathy	⋯	12/31/2021	20180929-0002

Lookup Column	Get information from list	Get information from column
Order.No	Order	No.

In **Order** list, column **Customer** looks up information from column **Customer** of **Customer** list, and column **Sales** looks up information from column **Saler** of **Sales** list.

Order

⊕ **new item** or edit this list

All Items ⋯ | Find an item 🔍

✓	No.		Product	Price	Amount	Sum	Customer	Saler
	20180927-0001	⋯	Cross-Site Lookup	$99.00	2	$198.00	Brandysoft	Tom
	20180928-0001	⋯	RichText Boost	$89.00	4	$356.00	Xilisoft	Bill
	20180928-0002	⋯	Permission Boost	$299.00	1	$299.00	SharePointBoost	Hans
	20180929-0001	⋯	Cross-Site Lookup	$99.00	3	$297.00	Brandysoft	Henry
	20180929-0002	⋯	RichText Boost	$89.00	2	$178.00	Xilisoft	Cathy

Lookup Column	Get information from list	Get information from column
Customer	Customer	Customer
Sales	Sales	Sales

Now, in **Customer** list, select item **Brandysoft** and click **Related Lookup Information** in context menu.
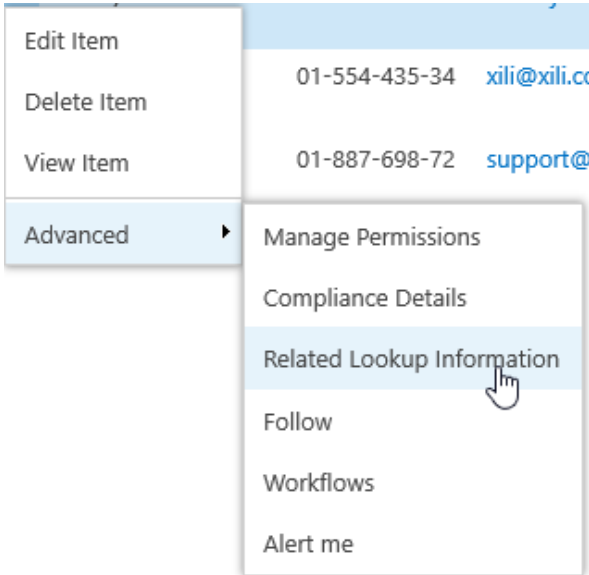
Then, all related information is displayed in one page, including all items from which this item looks up, and all items which look up information from this item.

Navigate to Order list, select item **20080927-0001** and click **Related Lookup Information** in context menu.

Then the lookup information is displayed as follows:

Related information for 20180927-0001

Look Up From

The followings are all other items from which this item looks up information:

Column	List	Items
Customer	Customer	Brandysoft
Saler	Sales	Tom

Looked Up By

The followings are all other items which look up information from this item:

List	Column	Items
Customer	Order No.	Brandysoft
Sales	Order No.	Tom

4. Troubleshooting & Support

Troubleshooting FAQ:

https://www.boostsolutions.com/general-faq.html#Show=ChildTitle9

Contact Info:

Product & Licensing Inquires: sales@boostsolutions.com

Technical Support (Basic): support@boostsolutions.com

Request a New Product or Feature: feature_request@boostsolutions.com

Appendix 1: License Management

You can use Lookup Tracker without entering any license code for a period of 30 days from when you first use it.

To use product without limitation, you will need to purchase a license and register the product.

Finding License Information

a.   In the products main page, click the trial link and enter the **License Management Center**.

b.   Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).
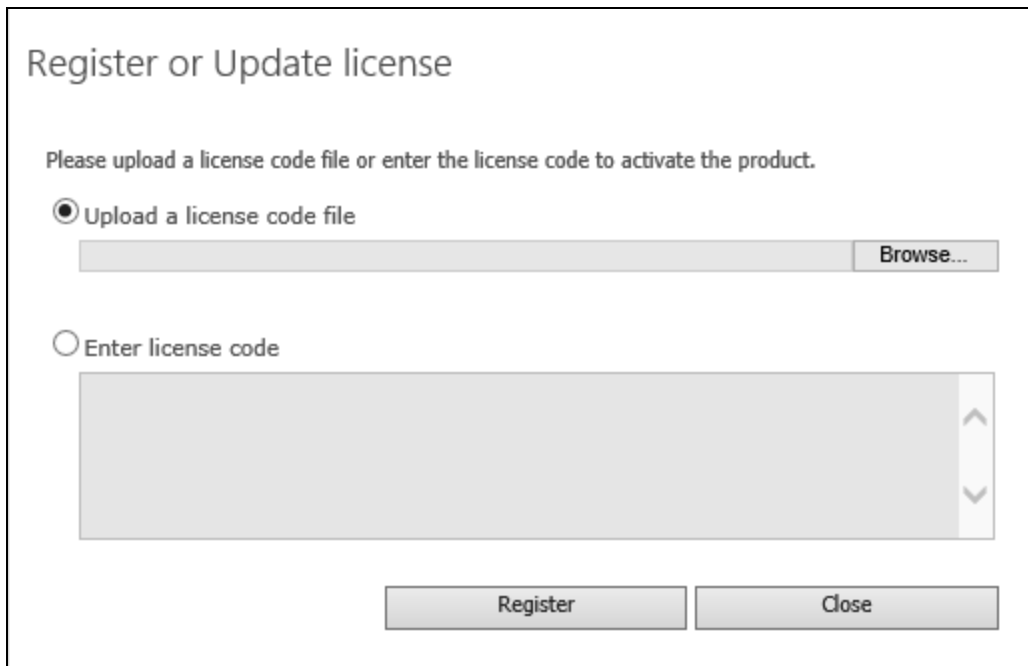
In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

c.   Send the above information to us (sales@boostsolutions.com) to generate a license code.
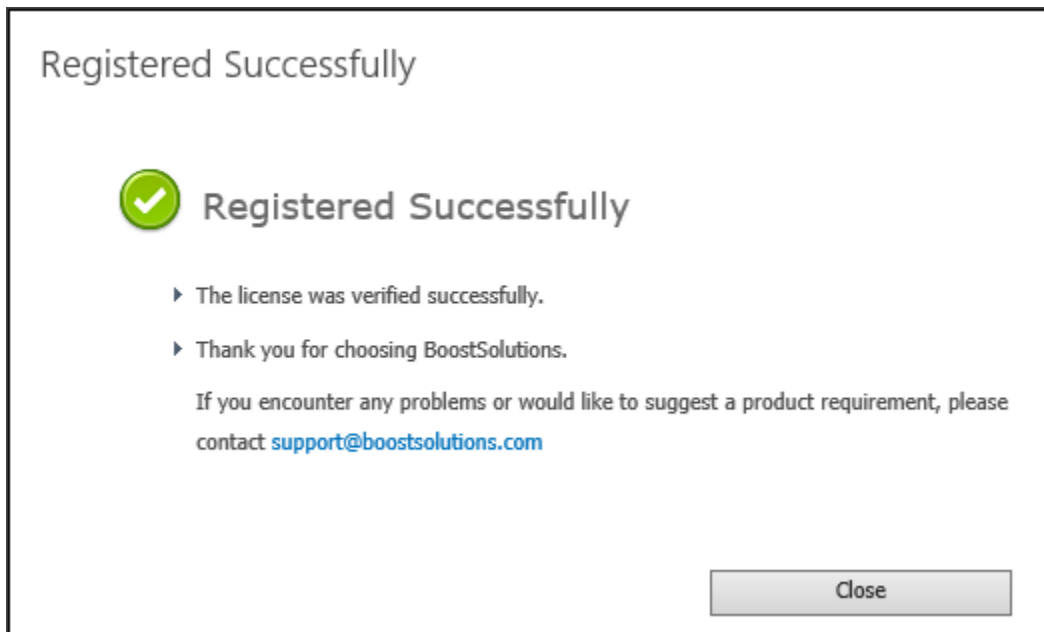
License Registration

a.   When you receive a product license code, enter the **License Management Center** page.

b.   Click **Register** on the license page and a **Register or Update license** window will open.

c.   Upload the license file or enter the license code and click **Register**. You will get confirmation that your license has been validated.

For more details on license management, see the BoostSolutions Foundation.