



# **Lookup Tracker 1.0**

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## **User Guide**

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Our web site: <http://www.boostsolutions.com>

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## 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:

<http://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](http://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\2.0\Setup.exe	The product installer for .Net Framework 2.0.
Library\2.0\Setup.exe.config	A file containing the configuration information for the installer.
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.
Solutions\Foundation\BoostSolutions.FoundationSetup12.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2007 or WSS 3.0.
Solutions\Foundation\BoostSolutions.FoundationSetup14.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2010 or SharePoint Foundation 2010.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\LookupBoost\BoostSolutions.LookupTrankerSetup12.1.wsp	A SharePoint solution package containing Lookup Tracker files and resources for SharePoint 2017 or WSS 3.0.
Solutions\LookupBoost\BoostSolutions.LookupTrackerSetup14.1.wsp	A SharePoint solution package containing Lookup Tracker files and resources for SharePoint 2010 or

	SharePoint Foundation 2010.
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\ 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 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 Mozilla Firefox supported Google Chrome supported

### SharePoint 2010

Operating System	Microsoft Windows Server 2008 x64 Microsoft Windows Server 2008 R2
Server	Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010 Microsoft .NET Framework 3.5
Browser	Microsoft Internet Explorer 7 or greater Mozilla Firefox

### SharePoint 2007

Operating System	Microsoft Windows Server 2003 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2008 R2
Server	Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 Microsoft .NET Framework 2.0 or 3.0 <b>Note:</b> This product is not compatible with SPS 2003 and WSS v2

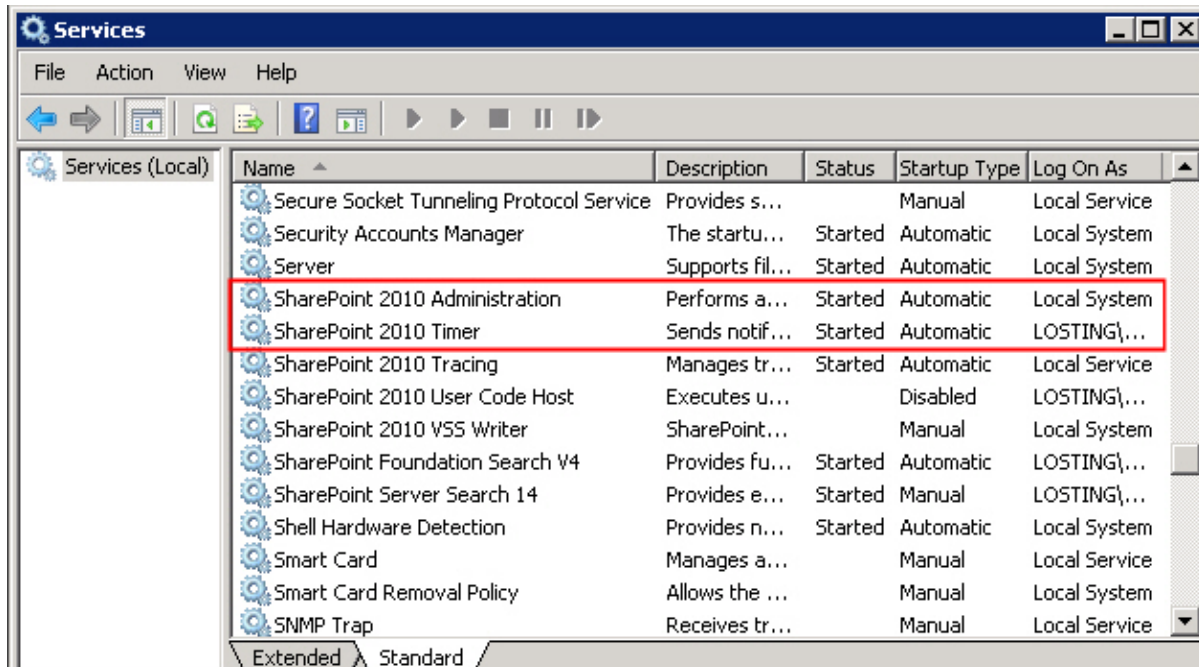
Browser	Microsoft Internet Explorer 6 or greater
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## 2.3 Installation

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 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.

- **SharePoint 2013**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\BIN

- **SharePoint 2010**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

- **SharePoint 2007**

C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\BIN

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

```
stsadm -o addsolution -filename BoostSolutions.LookupTrackerSetup14.1.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.LookupTrackerSetup14.1.wsp -
allowgacdeployment -url [virtual server url] -immediate
stsadm -o deploysolution -name BoostSolutions.FoundationSetup14.1.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.LookupTrackerSetup14.1.wsp
stsadm -o displaysolution -name BoostSolutions.FoundationSetup14.1.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.LookupTrackerSetup14.1.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.LookupTrackerSetup14.1.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.LookupTrackerSetup14.1.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.FoundationSetup14.1.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.FoundationSetup14.1.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:

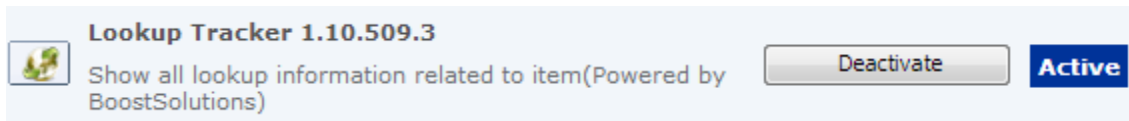
```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```


## **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. On the Site Actions menu  click **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**.



 **Lookup Tracker 1.10.509.3**  
Show all lookup information related to item(Powered by BoostSolutions)

**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**.

**Customer:**

Customer	Company	Phone	E-Mail	Sales	Order.No
Hans Brown	SPField	+86-010-58543216	<a href="mailto:hans@spfield.com">hans@spfield.com</a>	Tom	OR-056-VA69
Cathy Green	A Company	+86-010-55443454	<a href="mailto:cathy@acompany.org">cathy@acompany.org</a>	Lucy	OR-136-VY25
Susan Bily	B Company	+86-010-88765742	<a href="mailto:susan@bcompany.com">susan@bcompany.com</a>	Henry	OR-031-VX13
Carol Fox	C Company	+81-010-55789125	<a href="mailto:carol@ccompany.com">carol@ccompany.com</a>	Bill	OR-043-GI61

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

**Sales:**

Saler	Expire	Order.No
Tom	10/10/2013	OR-056-VA69
Lucy	10/17/2013	OR-136-VY25
Henry	10/31/2013	OR-031-VX13
Bill	10/18/2013	OR-043-GI61

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

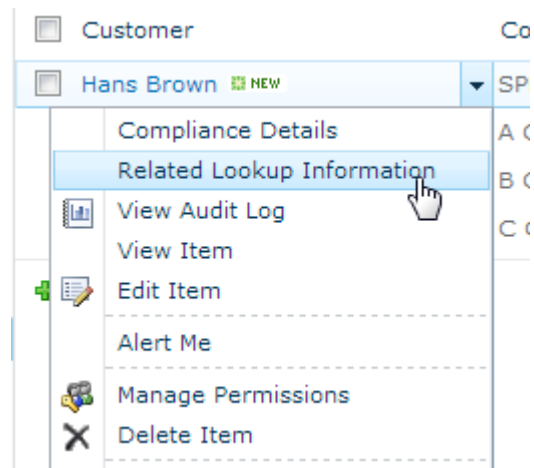
**Order:**

No.	Product	Price	Amount	Sum	Customer	Sales
OR-031-VX13	TransferDoc	\$199.00	1	\$199.00	Susan Bily	Henry
OR-043-GI61	ViewDoc	\$119.00	2	\$238.00	Carol Fox	Bill
OR-136-VY25	ComposeDoc	\$289.00	1	\$289.00	Cathy Green	Lucy
OR-056-VA69	MergeDoc	\$499.00	1	\$499.00	Hans Brown	Tom

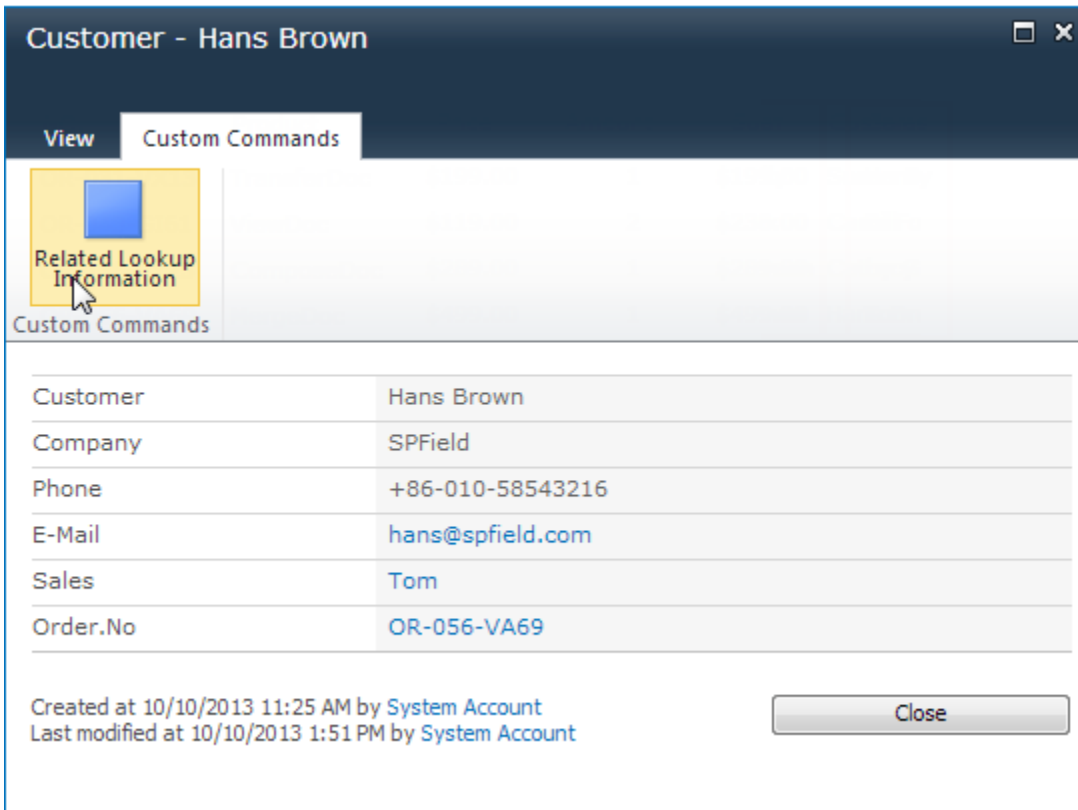
Lookup Column	Get information from list	Get information from column
Customer	Customer	Customer
Sales	Sales	Sales

Suppose we want to see related information of an item in the Customer List,

Navigate to the **Customer** list, select an item, and click **Relate Lookup Information** on the Edit menu.



Or, in the item view form, click **Related Lookup Information** under **Custom Commands**.



All the related information will be displayed in one page or a dialog window, including all items which this item looks up from and all items which look up information from this item.

**Look Up From**

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

Column	List	Items
Sales	<a href="#">Sales &gt; Sales</a>	Tom
Order.No	<a href="#">Sales &gt; Order</a>	OR-056-VA69

**Looked Up By**

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

List	Column	Items
<a href="#">Sales &gt; Order</a>	Customer	OR-056-VA69

**License Management**

[Click here to manage license for Lookup Tracker](#)

## 4. Troubleshooting & Support

### **Troubleshooting FAQ:**

<http://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

### **Contact Info:**

Product & Licensing Inquires: [sales@boostsolutions.com](mailto:sales@boostsolutions.com)

Technical Support (Basic): [support@boostsolutions.com](mailto:support@boostsolutions.com)

Request a New Product or Feature: [feature\\_request@boostsolutions.com](mailto:feature_request@boostsolutions.com)

### **Live Chat:**

<http://www.boostsolutions.com/support/chat/livezilla.php?intgroup=U3VwcG9ydA==&reset=true>

## 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).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

**Choose a license type**

Server License  
Server Code: e4c9171bd1aa49cea8903e0a7e0e812643f8360be  
a74459ca3bf6b2e0240f194

Farm License  
Farm ID: {e4c9171b-d1aa-49ce-a890-3e0a7e0e8126}  
Number of Users: 24 user(s)

Site Collection License  
Site Collection ID: 1316fb72-1436-41cf-949d-56ca6020320e Change  
Site Collection: <http://pro-mac>

Download Close

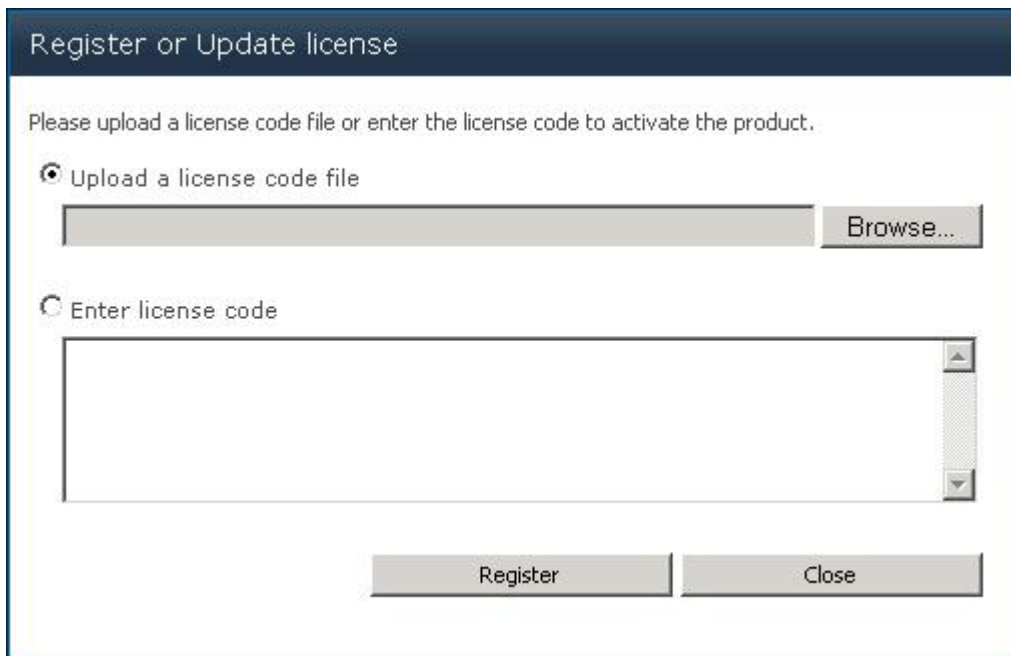
In order for BoostSolutions to create a license for you, you need to send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

- c. Send the above information to us ([sales@boostsolutions.com](mailto:sales@boostsolutions.com)) to generate a license code.

### License Registration

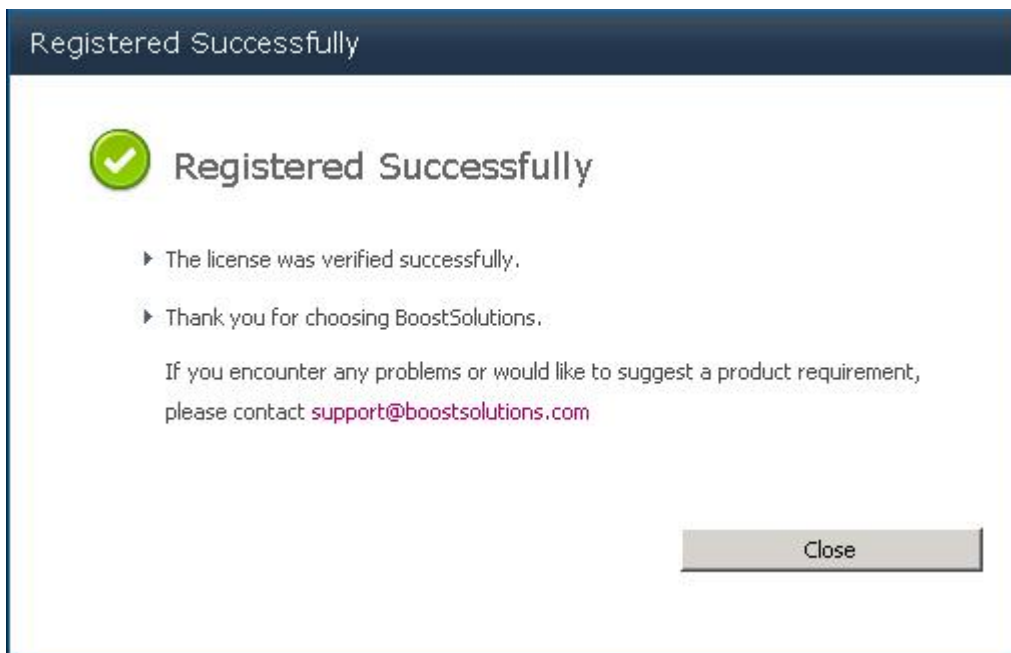


- a. When you receive a product license code, enter the **License Management Center** page.
- b. Click **Register** on the license page and a **Register or Update license** window will open.



The screenshot shows a dialog box titled "Register or Update license". The main text reads: "Please upload a license code file or enter the license code to activate the product." There are two radio button options: "Upload a license code file" (which is selected) and "Enter license code". Under the first option is a text input field and a "Browse..." button. Under the second option is a larger text input field. At the bottom of the dialog are two buttons: "Register" and "Close".

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



The screenshot shows a dialog box titled "Registered Successfully". It features a green checkmark icon in a circle. The main text reads: "Registered Successfully". Below this, there are two bullet points: "▶ The license was verified successfully." and "▶ Thank you for choosing BoostSolutions." A paragraph of text follows: "If you encounter any problems or would like to suggest a product requirement, please contact [support@boostsolutions.com](mailto:support@boostsolutions.com)". At the bottom right of the dialog is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).