

Cross-Site Lookup 4.0

User Guide

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

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1. Product Introduction

Cross-Site Lookup enhances the capability of original SharePoint Lookup column and allows you to lookup information from any site within the same collection.

This user guide will guide you to install and configure Cascaded Lookup on your SharePoint.

For latest version of this copy or other user guides, please visit our document center:

<http://www.boostsolutions.com/download-documentation.html>

2. Installation

2.1 Product Files

After you download and unzip the Cross-Site Lookup 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.
Cross-Site Lookup_V4_User Guide.pdf	User guide for Cross-Site Lookup 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\ CrossSiteLookup\BoostSolutions.CrossSiteLookupSetup12.4.wsp	A SharePoint solution package containing Cross-Site Lookup files and resources for SharePoint 2017 or WSS 3.0.
Solutions\ CrossSiteLookup \BoostSolutions.CrossSiteLookupSetup14.4.wsp	A SharePoint solution package containing Cross-Site Lookup files and resources for SharePoint 2010 or SharePoint Foundation 2010.

Solutions\ CrossSiteLookup \ BoostSolutions.CrossSiteLookupSetup15.4.wsp	A SharePoint solution package containing Cross-Site Lookup files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\ CrossSiteLookup\ Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Cross-Site Lookup, 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 Google Chrome

SharePoint 2007

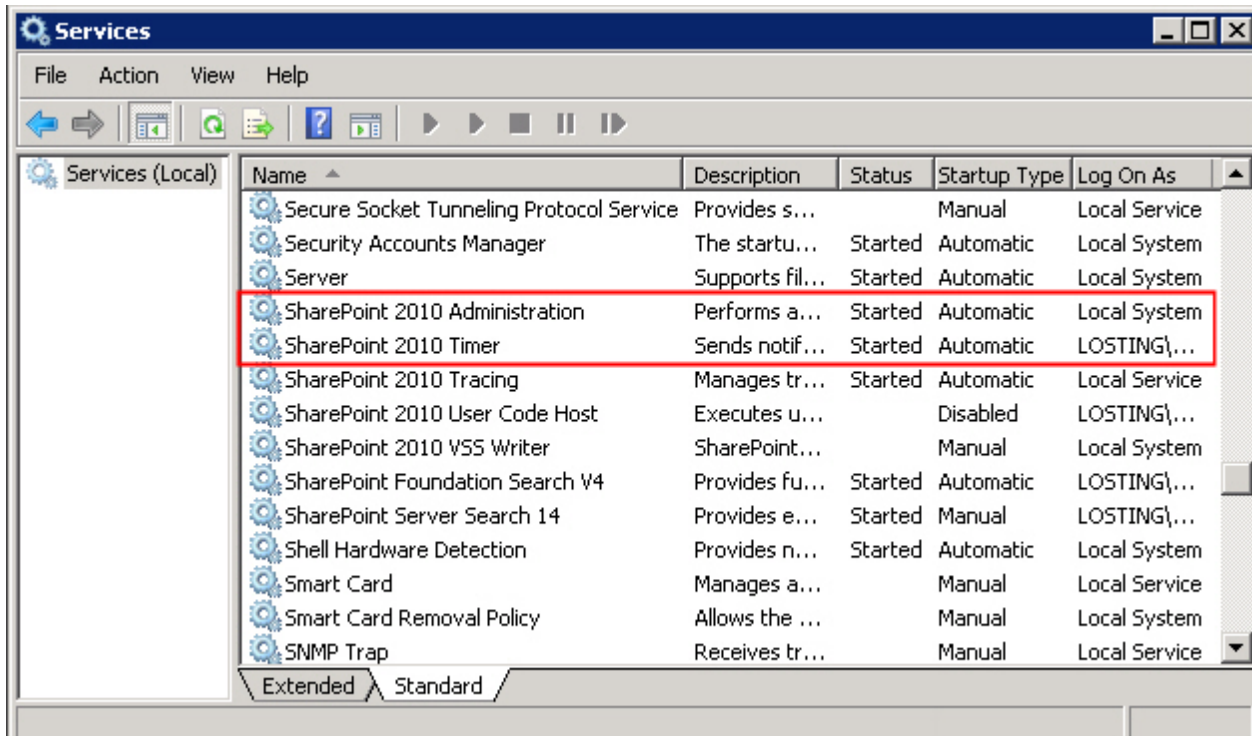
Operating System	Microsoft Windows Server 2003 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2008 R2
Server	Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007 Microsoft .NET Framework 2.0 or 3.0 Note: This product is not compatible with SPS 2003 and WSS v2
Browser	Microsoft Internet Explorer 6 or greater

2.3 Installation

Follow these steps to install Cross-Site Lookup 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**.



Cross-Site Lookup 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 Cross-Site Lookup on SharePoint server.

- 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 Cross-Site Lookup 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 Cross-Site Lookup 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.CrossSiteLookupSetup14.4.wsp
stsadm -o addsolution -filename BoostSolutions.FoundationSetup14.1.wsp
```

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

```
stsadm -o deploysolution -name BoostSolutions.CrossSiteLookupSetup14.4.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.CrossSiteLookupSetup14.4.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 SharePointBoost.CrossSiteLookup -url [site collection url] -
force

stsadm -o activatefeature -name SharePointBoost.CrossSiteLookupDataAdapter -url [site
collection url] -force

stsadm -o activatefeature -name SharePointBoost.CrossSiteLookup.CA -url [site collection url]
-force
```

To remove Cross-Site Lookup from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.CrossSiteLookupSetup14.4.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.CrossSiteLookupSetup14.4.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.CrossSiteLookupSetup14.4.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 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.

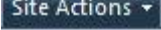
- c. Remove the solution from the SharePoint solutions storage:

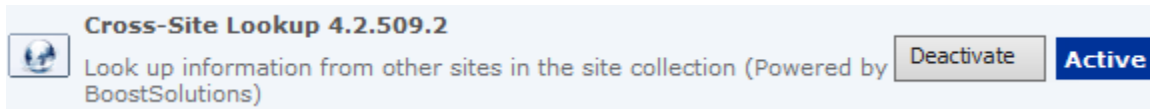
```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup14.1.wsp
```

2.7 Feature Activation

Activate Cross-Site Lookup's features 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**.



Activate Cross-Site Lookup's features in Central Administration

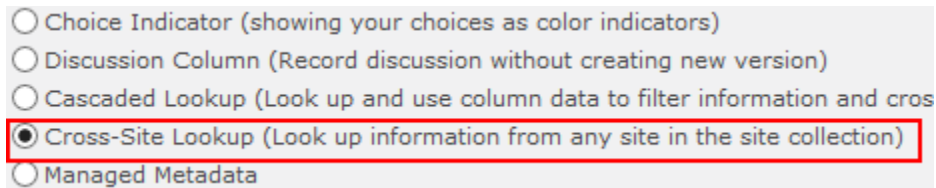
- a. Using the Quick Launch click **Application Management**.
- b. On the Application Management page, under Manage Applications, click **Manage Web applications**.
- c. Select a web application you want to configure and click **Manage Features** on the ribbon.
- d. Find Cross-Site Lookup's features and click **Activate**. After a feature is activated, the Status column lists the feature as **Active**.



3. How to use Cross-Site Lookup

3.1 Settings for Cross-Site Lookup

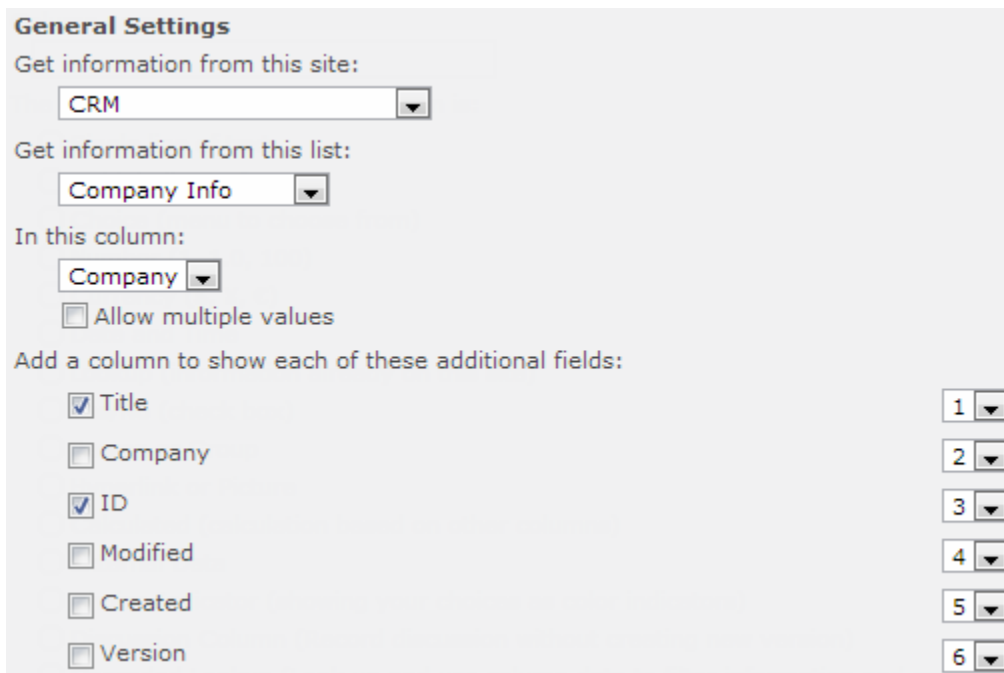
After you install the product on the SharePoint server, a **Cross-Site Lookup** column type will be available in the **Create Column** page.



A screenshot of the 'Create Column' page in SharePoint. It shows five radio button options. The option 'Cross-Site Lookup (Look up information from any site in the site collection)' is selected and highlighted with a red rectangular box. The other options are: 'Choice Indicator (showing your choices as color indicators)', 'Discussion Column (Record discussion without creating new version)', 'Cascaded Lookup (Look up and use column data to filter information and cross-site lookup)', and 'Managed Metadata'.

3.1.1 General Settings

The General Settings section allows you to specify the source column which is used to get information from.



A screenshot of the 'General Settings' section for a Cross-Site Lookup column. It contains several configuration options:

- Get information from this site:** A dropdown menu with 'CRM' selected.
- Get information from this list:** A dropdown menu with 'Company Info' selected.
- In this column:** A dropdown menu with 'Company' selected.
- Allow multiple values:** An unchecked checkbox.
- Add a column to show each of these additional fields:** A list of fields with checkboxes and a column of dropdown menus for ordering:
 - ☒ Title (dropdown 1)
 - ☐ Company (dropdown 2)
 - ☒ ID (dropdown 3)
 - ☐ Modified (dropdown 4)
 - ☐ Created (dropdown 5)
 - ☐ Version (dropdown 6)

- **Get information form this site**

This dropdown list shows all the sites in the current site collection. You need to specify the source site here; a source site is where the lookup list is located. The source site can be any site in the current site collection.

Note Supported Source Column types include: Single Line of Text, Number, Date and time, Calculated (output is single line of text), ID, Modified, Created, Version.

- **Get information form this list**

This dropdown list shows all the available lists in the site you selected. You need to specify the source list here (such as a SharePoint lookup column). The source list is a list that Cross-Site lookup will use to refer to information.

- **In this column**

In this dropdown list, you will need to specify the source column. A source column contains data for your Cross-site Lookup dropdown list.

- **Addition fields**

This function allows you to add more columns to the lookup that will be displayed only in the list view page. You can specify the order of additional columns by selecting the number on the right side of the columns.

3.1.2 Advanced Settings

Cross-Site Lookup provides you the following options in Advanced Settings to make your look-up more efficient.

Advanced Settings

- ☒ Enable creating new item in the source lookup list
Text of creating new item link:
- ☒ Filter by view
- ☐ Folder mode (Look up folders from other sites or lists. The contents of the folders will only be visible when you view an item. Please make sure that you look up based on a column containing information, i.e. if you look up based on the column "Title," then each item must have a title.)
- ☒ Display only one instance of duplicate items

- **Enable creating new item in the source lookup list**

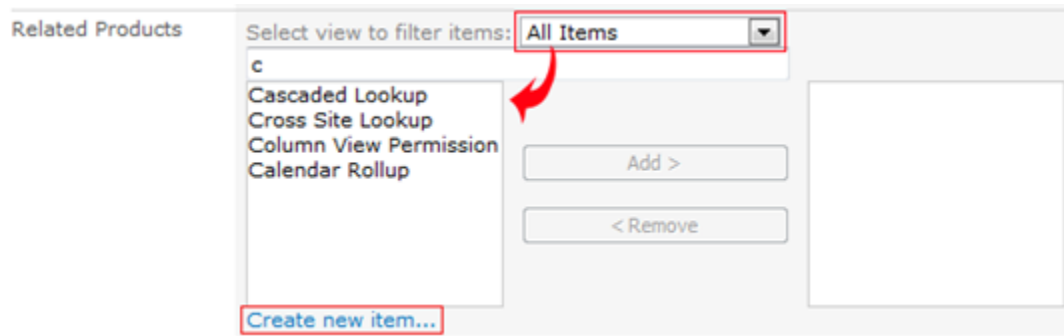
When you check this box you can add new items in the source lookup list. The following link will be added below the lookup field:

Country

Note You can customize the text of creating new item link.

- **Filter by view**

Add a filter for the Cross-site column. This means if a view is selected, the column will only display items that are related to the selected view.



- **Folder mode**

Enable this function to look up folder information in the source list.

Note

- When you enable Folder mode, **Filter by view** and **Display only one instance of duplicate items** will be disabled.
- Folder information will be shown in **New Item Form** and **Edit Item Form** dropdown list; the content of the folders will only be visible in the **View Item Form**.
- The Cross-site Lookup column dropdown list will show nothing if the source column does not contain information.

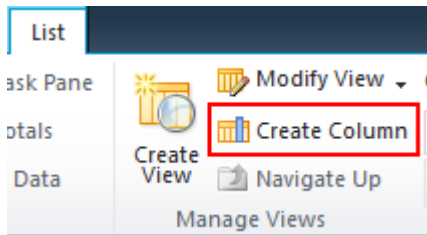
- **Display only one instance of duplicate items**

Select this checkbox to display one item when duplicate items exist.

3.2 Create a Cross-Site Lookup column

To create a Cross-Site Lookup column, you must have design permission level for the list or library or be a member of the default SharePoint Designer group.

- Enter the list or library that you want to create a Cross-site Lookup column for.
- On the Ribbon, click the **List** or **Library** tab and then click **Create Column** in the Manage View group.

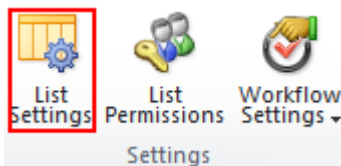


- c. In the Create Column dialog box, configure the following sections:
 - a. In the **Name and Type** section, enter a name for your Cross-site lookup column in the Column name box.
 - b. Under **The type of information in this column is**, select Cross-Site Lookup.
 - c. In the General Settings section, you need to specify the source information for your lookup column. You can select **Allow multiple values** if you need to enable multiple values in your lookup column.

3.3 Edit a Cross-Site Lookup column

You can change the settings for a Cross-Site Lookup column. But just like the SharePoint lookup column, you cannot change the column type, source site, and the source list.

- a. Enter the list or library that contains the Cross-Site Lookup column you want to edit.
- b. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.



- c. On the List Settings or Library Settings page, under the **Columns** section, click the name of the Cross-Site Lookup column that you want to edit.

Columns

A column stores information about each document in document library:

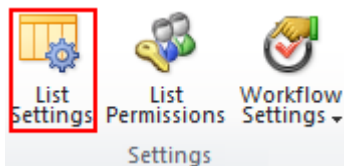
Column (click to edit)	Type
Title	Single line of text
Cross-Site Lookup column	Cross-Site Lookup
Cascaded Lookup column	Cascaded Lookup
Created By	Person or Group

- d. Change the settings that you want and then click **OK**.

3.4 Delete a Cross-Site Lookup column

This procedure deletes the Cross-Site Lookup column and any data in this column. You cannot restore the Cross-Site Lookup column from the Recycle Bin once it has been deleted.

- a. Enter the list or library that contains the Cross-Site Lookup column you want to edit.
- b. On the Ribbon, click the **List** or **Library** tab and then click **List Settings** or **Library Settings** in the Settings group.



- c. On the List Settings or Library Settings page, in the **Columns** section, click the name of the Cross-Site Lookup column that you want to delete.

Columns

A column stores information about each document in document library:

Column (click to edit)	Type
Title	Single line of text
Cross-Site Lookup column	Cross-Site Lookup
Cascaded Lookup column	Cascaded Lookup
Created By	Person or Group

- d. Scroll to the bottom of the **Change Column** page and then click **Delete**.
- e. When prompted, click **OK**.

3.5 Convert Column

This function allows you to convert lookup columns from Cross-Site Lookup, Cascaded Lookup and SharePoint lookup column without creating new lookup columns. Converting will keep the Cross-Site Lookup settings when converting into a SharePoint lookup column.

3.5.1 Convert a lookup column into a Cross-Site Lookup column

This function helps you to convert a lookup column (SharePoint lookup or Cascaded lookup) to a Cross-Site Lookup column.

- a. Open the **Create Column** page and select Cross-Site Lookup in the Name and type section.

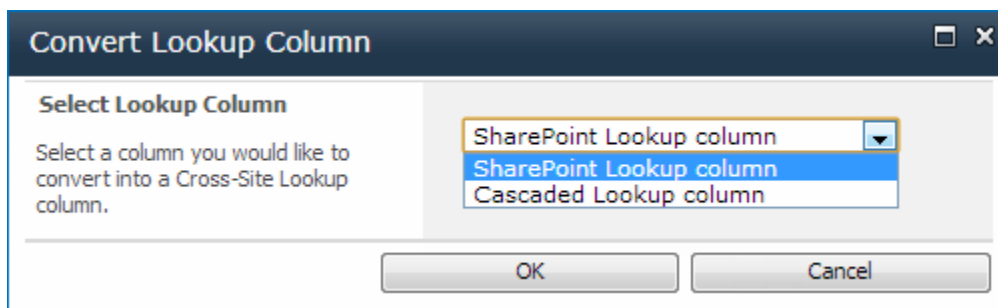
- b. Configure the General Settings and Advanced Settings as per your needs.
- c. Click **Click here to convert a Lookup column in this list into a Cross-Site Lookup column.**

Convert:

[Click here to convert a Lookup column in this list into a Cross-Site Lookup column](#)

Note This link will not appear if there is no Cascaded Lookup or SharePoint Lookup column in the current list.

- d. A **Convert Lookup Column** dialog box will appear. In the select lookup column dropdown list you will find all the Cascaded lookup and SharePoint lookup columns.



- e. Choose a lookup column you would like to convert into a Cross-Site Lookup column, and click **OK**. You will return to the **Change Column** page. The column has already been converted into a SharePoint Lookup column or Cascaded Lookup column.
- f. Click **OK** to save the column settings.

3.5.2 Convert to original SharePoint Lookup column

This function helps you to convert a Cross-Site Lookup column into an original SharePoint Lookup column.

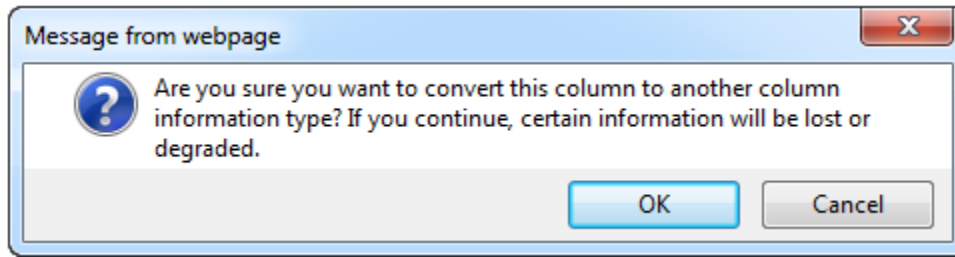
- a. First select the Cross-Site Lookup column you want to convert into an original SharePoint Lookup column and then enter the **Change Column** page.
- b. Select **Convert to original SharePoint Lookup column (stop using "Cross-Site Lookup" features).**

Convert:

☒ [Convert to original SharePoint Lookup column \(stop using "Cross-Site Lookup" features\)](#)

Note This function is not available in the **trial version**.

- c. A prompt dialog box will appear as follows:



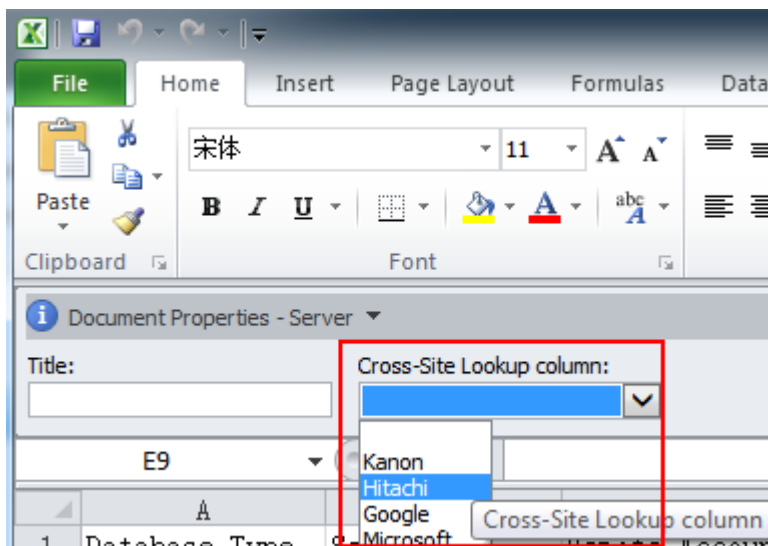
- d. Click **OK**. You will return to the **Change Column** page. The Cross-Site Lookup column has already been converted into an original SharePoint lookup column.
- e. Click **OK** to save the column settings.

4. Manage Column Data with Microsoft Office Applications

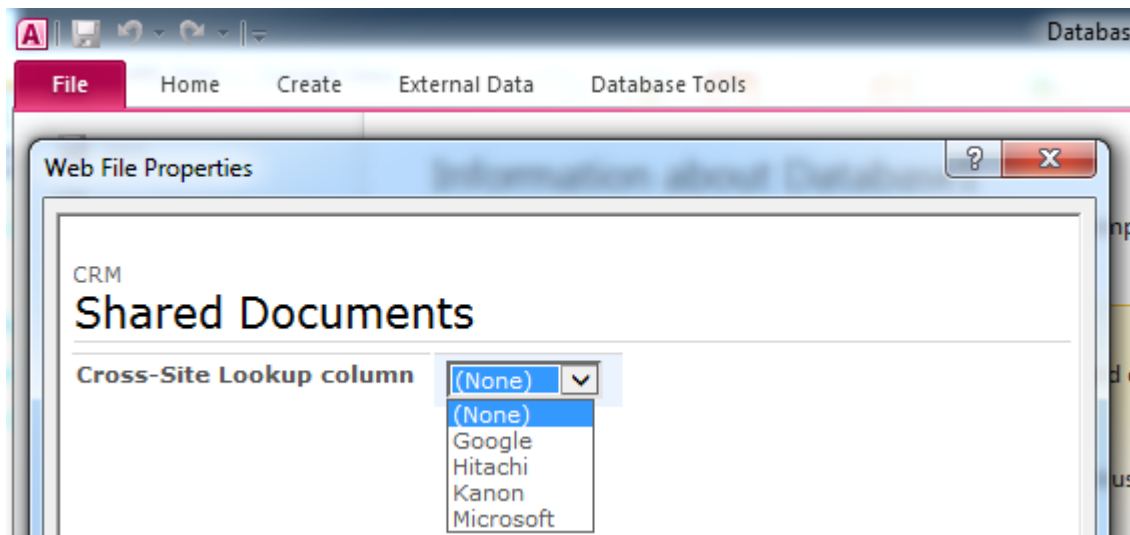
By default, SharePoint only can manage column data in Microsoft Office applications. Cross-Site Lookup 4.0 provides a new **Data Adapter** Web Application feature that enhances the functionality of SharePoint with the ability to manage Cross-Site Lookup columns in **Microsoft Excel**, **Microsoft Access**, **Microsoft Word** and **SharePoint Workspace**.

To activate Cross-Site Lookup Data Adapter feature, please see section [2.2 Feature Activation](#).

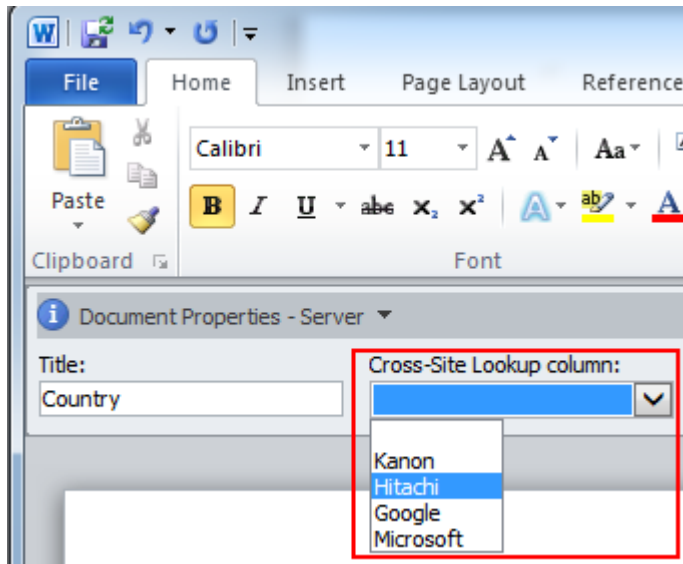
- **Microsoft Excel**



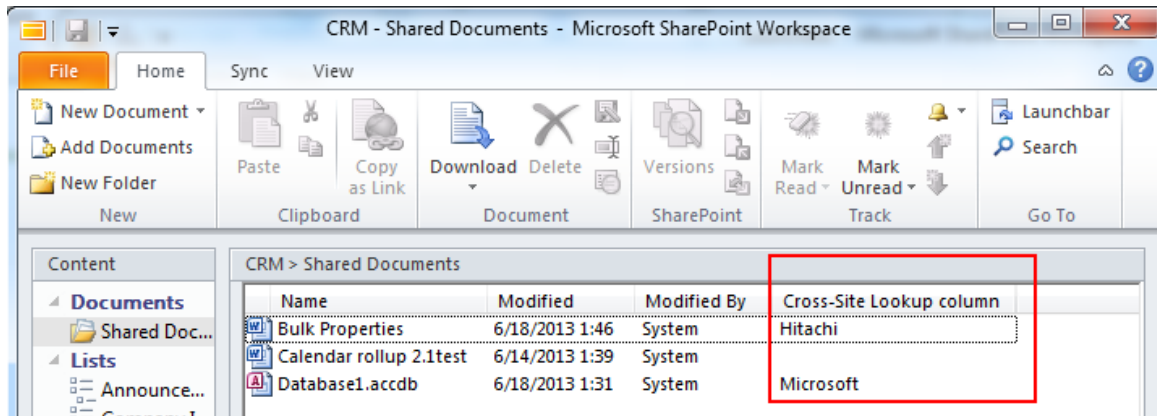
- **Microsoft Access**



- **Microsoft Word**



- **SharePoint Workspace**



5. Technical Limitations

Cross-Site Lookup has the following limitations:

- Cannot use the filter by view function when using datasheet view.
- Cannot use the cross site function in Microsoft Office applications.
- Cannot edit column values in Microsoft Access when using Cross-site Lookup.
- When the multiple values function is enabled for Cross-Site Lookup columns, it will only display the lookup item ID in Microsoft Access.
- When the multiple values function is enabled for Cross-Site Lookup columns, it cannot be managed in Microsoft Word.
- In datasheet view, the Cascaded Lookup & Cross-Site Lookup column cannot be edited in SharePoint 2013.

6. Troubleshooting & Support

Troubleshooting FAQ:

<http://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

Live chat:

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

Appendix 1: License Management

You can use Cross-Site Lookup 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

1. In the products main page, click the trial link and enter the **License Management Center**.
2. 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.

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

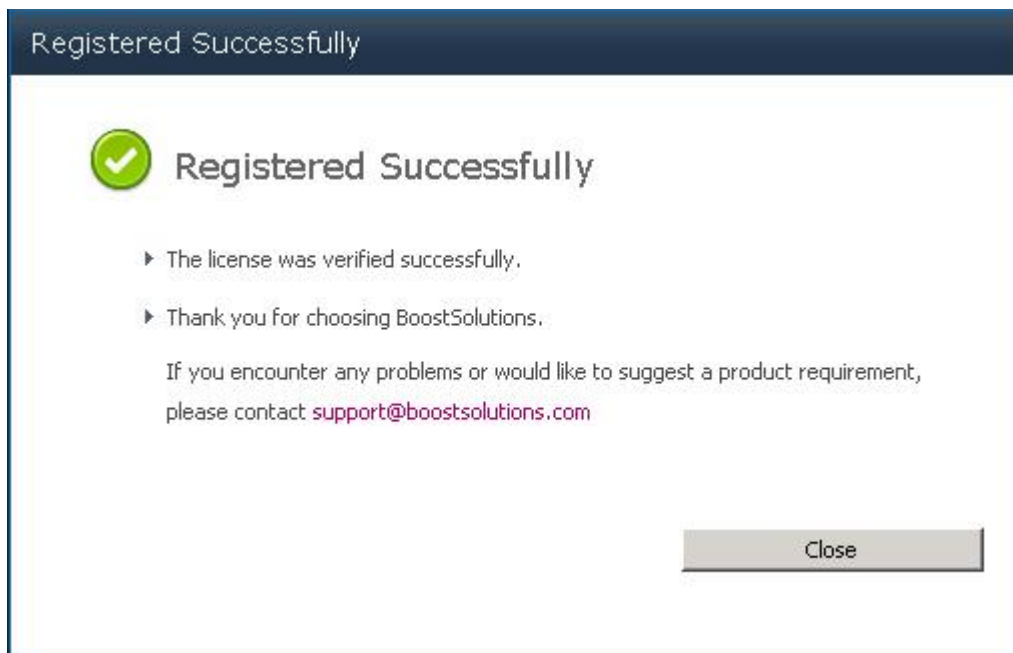
License Registration

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



The dialog box has a dark blue header with the title "Register or Update license". Below the header, the text "Please upload a license code file or enter the license code to activate the product." is displayed. There are two radio buttons: "Upload a license code file" (selected) and "Enter license code". The "Upload a license code file" option has a text input field and a "Browse..." button. The "Enter license code" option has a large text input field. At the bottom, there are two buttons: "Register" and "Close".

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



The dialog box has a dark blue header with the title "Registered Successfully". Below the header, there is a green checkmark icon followed by the text "Registered Successfully". Below this, there are two bullet points: "The license was verified successfully." and "Thank you for choosing BoostSolutions.". Below the bullet points, there is a paragraph of text: "If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com". At the bottom right, there is a "Close" button.

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