

echo Technology

echo for SharePoint 2007 version 1.2

User and Installation Guide

Version 4

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About echo for SharePoint

echo is a server tool that allows you to replicate design changes from a source site to a single or multiple destinations both on the local machine and remotely (server to server).

Echo Managers

Echo performs its replication tasks through a number of managers. These are:

- **Web part Manager**

This manager allows you to replicate web parts from a web part page to a number of destinations.

- **Workflow Manager**

This manager allows you to replicate workflows from a source list to a number of destinations. It supports:

- Out of the box workflows (approval, collect feedback, etc)
- .NET custom workflows
- SharePoint Designer workflows
- Nintex Workflows

- **Site Manager**

This manager allows you to

- Replicate site settings, security, alerts and regional settings from a source site to a number of destinations
- Create site collections including targeting specific content databases
- Create sub sites from site definitions or existing sites.
- Manage site columns and content types

- **Features Manager**

This manager allows you to activate or deactivate features at the site or site collection scopes.

- **Content Loader Manager**

This manager allows you to load content to document libraries and lists.

Echo creates a “control file” which is a spreadsheet-like-control where you specify the source, destination and metadata values.

- **List Manager**

This manager allows you to replicate design changes from a source list to a number of destinations including list settings (versions, approvals, etc), fields and structure (including content type associations), views and list permissions.

- **Reports Manager**

This manager allows you analyze aspects of SharePoint such as:

- Storage Usage – this report returns the space in MB used by site collections and sites
- Security Permissions – this report returns the security permissions that a user has assigned throughout the web application (site collections, sites, lists)

Batching and scheduling

Batching is a powerful feature that allows you to execute multiple tasks either immediately or at a later time through Windows Scheduler.

The echo managers allow you to create individual tasks, save them for later execution, create a batch from the saved tasks and also schedule a batch for unattended execution.

Remote execution

The remote execution features of echo allow you to use the echo managers on remote SharePoint farms. As such, echo supports dev-test-production type scenarios where the environments are installed on separate farms.

Trial version

You can register for a trial version from the [echo Technology web site](#), download a copy of echo and start evaluating its functionality in your own environment.

The trial version gives you access to all functionality in echo to a maximum of 50 updates for each manager and 50 documents upload for the content loader.

The trial requires you to be connected to the internet while using the software.

Getting Started

This section covers the following:

1. System requirements
2. Installation
3. Starting echo the first time
4. Running echo in trial mode.

System requirements

1. Windows 2003
2. Windows SharePoint Services 3 (WSS) or Microsoft Office SharePoint Server 2007 (MOSS)

Installing echo

- **Prerequisites**

1. Logged in to the SharePoint front end server with Local Administrator access.
2. Have read/write access to the SQL server where the content and configuration databases are stored (single machine or server farm).



- **Installing the software**

1. Log on to the SharePoint front end server with an account that has administrator rights.

2. Run the **echo2007CoreComponents.msi** package and install the core components by following the prompts (Check the registration email from Echo Technology).
3. Run the **Echo2007Suite.msi** or echo manager installer by following the prompts.
4. The installer will query you for the credentials which are used to run the echo service. Enter **DomainName\Administrator** and your **password**. The service is required on the destination server for remote execution (see also installing the echo service for remote execution).

Uninstalling echo

If you need to uninstall echo, follow these steps

1. Open 'Add or Remove Programs' in the Windows control panel.
2. Select 'echo for SharePoint 2007' from the list of installed programs.
3. Select the **Remove** option.

Installing the echo service for remote execution

When installing echo for SharePoint using the installer .msi, the echo for SharePoint service is also installed. The service needs to run under an account with administrator privileges on one of the front end servers in the SharePoint farm.

1. Install echo on a front end server in the destination farm. The installer will query you for credentials for the account to run the service under.
2. After installation on your destination front end, you will need to run echo in order to activate it (see also starting and configuring echo).
3. Once activated, echo will ask you if you want to start the service. Click yes to start the service.
4. Install and activate echo on the source farm.
5. Set-up a remote server connection on your source farm (see setting up remote locations).

Installing the echo Remote Agent for SharePoint 2003

The Remote Agent for SharePoint 2003 is used by echo for SharePoint 2007 to connect to a SharePoint 2003 environment to retrieve content information and site information.

The setup is a separate msi file. To install it, go to the destination server or remote server and follow these steps:

- **Create a new IIS web site**

1. Open Internet Information Service manager
2. Right click on web sites and select New web site
3. Create a new web site under IIS and assign a port to it. For example port 99.

- **Install the remote agent**

1. Once echo is installed on the server then you need to install the remote agent
2. Select **Start > Programs > echo > Install remote agent**
3. On the setup routine, leave the virtual directory as "RemoteEcho"
4. Set the port to 99 (or the port where you created the web site).
5. Click **Next** and **Finish**.

NOTE: You could install the remote agent on the same web site as a SharePoint portal or WSS site, but you must make sure that the path '/RemoteEcho' is excluded from the managed paths.

Starting and configuring echo

When you start echo for the first time you will be asked for Registration and Activation details. Please follow these steps.

Start echo

1. Go to the Start menu > All Programs > echo for SharePoint 2007 > echo 2007
2. If this is the first time, you will be prompted for your registration and activation details

Registration and Activation

- **Enter registration details**

1. Enter your name, company, registration key (emailed to you from Echo Technology) and email address. Fill out these fields.
2. Click **Register**.

EchoTechnology.Echo.Console

Register Your Software

In order to continue you must register your copy of EchoTechnology.Echo.Console. Registration is required to be eligible for updates and support.

Name ●

Organization

Serial Number ●

● Indicates that you must fill in the field.

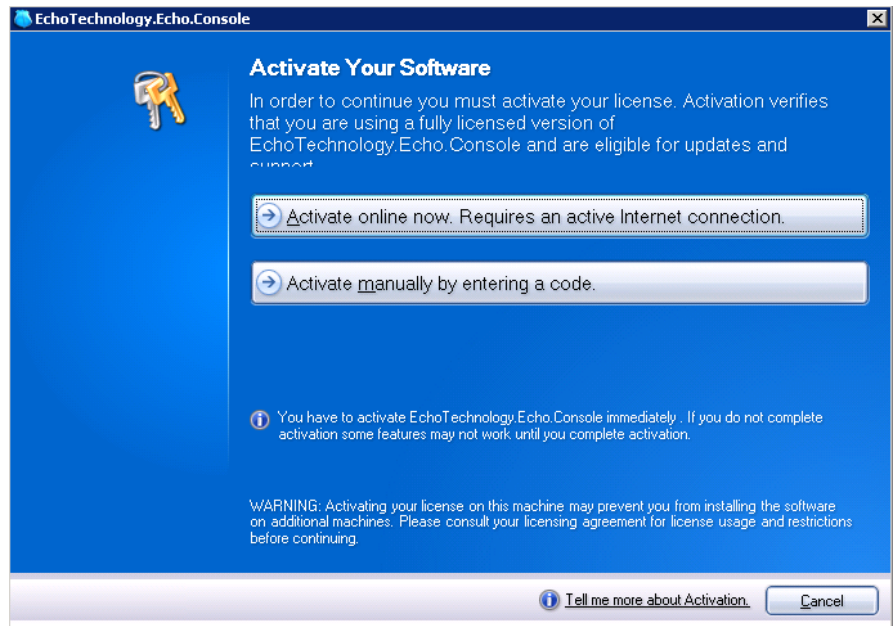
Register Cancel

If your server is connected to the internet and does not require a proxy server then your copy of echo will be activated online. Otherwise, follow the manual activation steps.

- **Manual Activation**

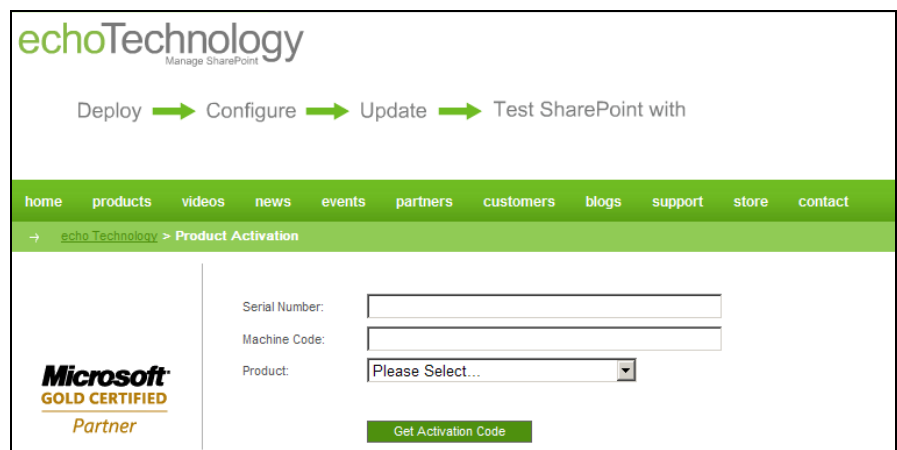
You will be shown the manual activation screen if:

- Your server is not connected to the internet
- Your server requires a proxy server to access the internet
- Your server requires a logon to a proxy server to access the internet



To activate follow these instructions:

1. Click the “Activate manually by entering a code” button
2. From a machine that can access the internet, open Internet Explorer and navigate to the following address:
<http://www.echotechnology.com/Registration/ProductActivation.aspx>
3. Select your version of echo from the product list, enter your serial number and machine code
4. Press Get Activation Code
5. Copy the activation code and paste it to the echo activation screen.



TIP: You can copy the details to the clipboard, paste it to notepad and then use this to paste on to the web page.

Setting up remote locations

Echo allows you to connect to external servers for collection of data (2003 server, lotus notes) and remote execution of echo tasks (2007 server).

Setting up a SharePoint 2007 connection

To use the remote execution features of echo for SharePoint, you need to install echo on a front end server on your source farm and on a front end server on the destination farm.

When both installations are activated, you can set up the connection on the source farm.

1. Start echo for SharePoint 2007 on the source front end server.
2. Click the Options -> Remote Locations menu to open the remote locations screen.
3. Add a new row by clicking on the empty row in the bottom of the list
4. Choose SharePoint 2007 as the server type and enter the server name.
5. 2007 default connection settings are protocol: net.tcp and port: 8712
6. When using different credentials on the destination farm you can provide specific credentials.
7. Click the test button to test the connection settings.
8. Click Ok to save the connection settings.

The remote server will now appear in the destination selection screen for the applicable managers.

Setting up a SharePoint 2003 connection

Echo allows only one connection to a SharePoint 2003 server at a time.

To configure a remote SharePoint 2003 source, follow these instructions:

1. Install and configure the remote echo agent for SharePoint 2003 on the remote server (refer to 'Installing the echo Remote Agent for SharePoint 2003' section for extra details)
2. Enter the Machine Name. This can be either the host name, Fully qualified domain name (FQDN) or the TCP/IP address of the server
3. Enter the Web service port – this is the IIS port where the remote echo agent is running on the remote server.
4. Enter the Remote Portal Url - This is the Url of the portal that you want to connect to on the remote server. Enter this url in the Path text box, in the form http://server[:port]/
5. Enter the user name - This is a user with enough privileges to access the structure and content of SharePoint on the remote machine. You can optionally include a domain name with the user name in the format [\\domain\]username
6. Enter the password – the password for the above user. This is stored encrypted on the local machine.
7. Click the test button to test the connection settings.

8. Click Ok to save the connection settings.

Adding echo for SharePoint 2007 license file

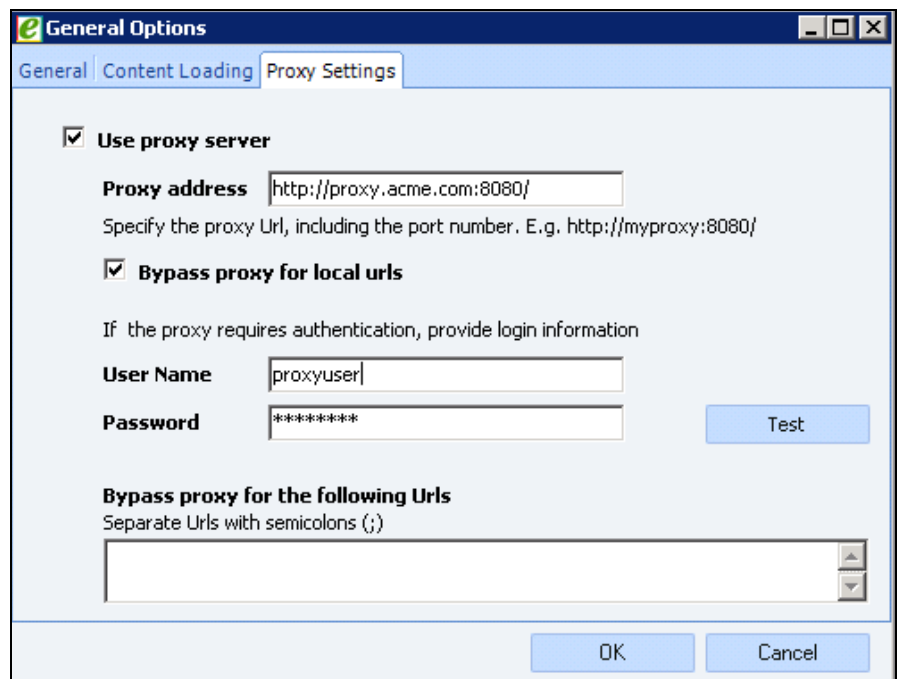
1. Start echo for SharePoint 2007, click 'Add License'
2. Locate your echo for SharePoint 2007 license file and click OK.

Using echo in trial mode

When running the trial version of echo you must be connected to the internet. If your server accesses the internet via a proxy then configure the proxy settings in echo

- **Proxy settings**

1. From echo, select Options > Proxy Settings
2. Configure your proxy server and port
3. If you require a user name and password then enter them
4. Click the Test button to ensure the connection is valid.



- **Checking your usage**

During the trial you get a limited amount of updates. You can check your usage by selecting Help > About.

echo for Sharepoint 2007 Trial

echo for Sharepoint 2007 Trial
v0.4.0.77

This product is licensed to:
John Citizen
ACME
TRL07-6C5TT-X12QR-LXCJ-VKN8

Manager	Remaining updates
ContentLoader	50
Features	25
ListItemLoader	25
Lists	25

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Manage SharePoint

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Echo Options

This section details the options that can be set in echo for SharePoint 2007.

General Options

- **HTTP request timeout**

When you have slow networks a higher number will reduce the number of http timeouts generated by the network

- **SQL command timeout**

Adjust this upwards when you are getting SQL command timeouts.

- **Workbook font size**

This applies to all workbooks in the application. You will need to re start echo for this setting to apply.

- **Preserve content**

Setting this option to true prevents the deletion or removal of content and will disable those options from the different echo managers.

Content Loader Options

Large file support

- **Transfer buffer size**

The higher this number, the bigger the chunk/block of bytes created when the large file threshold is reached. This is to avoid timeouts when transferring large files from one server/location to another.

- **File size threshold**

Any file larger than this size will be broken up into chunks. The size of this buffer is controlled by the previous setting.

Note: File size threshold and transfer buffer size are only used in uploading files from local disk or network shares.

Control file options

- **Ignore columns**

Any column header in a control file that is prefixed with this string will be ignored when performing a content loading task.

- **Do not process records with successful status**

By default it is set to true. True means that records in the control file that have this status will be ignored in the event of re-running the task.

Setting this to false means that all records regardless of whether they have been already imported will be loaded to the destination.

Field column mapping

- **Mapping file**

This is a text file containing the mappings of fields from a source to a destination.

Echo attempts to map fields by their internal name wherever possible. However if the internal names do not match from source to destination you can specify the rules in this mapping file.

If you wanted to map source SharePoint 2003 fields to the destination, as specified in this table

Source	Destination
Department	Deparment_x0020_Name
Colour	Color
Title	Department_x0020_title

Then you would create a mapping xml file as:

```
<?xml version="1.0" encoding="utf-8"?>
<Mapping>
  <SharePoint2003>
    <Fields>
      <Field Name="Department"
SharePoint07Name="Deparment_x0020_Name" />
      <Field Name="Colour"
SharePoint07Name="Color" />
      <Field Name="Title"
SharePoint07Name="Document_x0020_Title" />
    </Fields>
  </SharePoint2003>
</Mapping>
```

Site Manager

This section explains how to use the Site manager within echo for SharePoint.

The Site Manager is used to

1. Update site settings.
2. Create site collections
3. Create sub sites



Update site settings

Use this task if you want to replicate site settings from a source site to a number of destinations.

To configure this task:

1. Click the link “Update Sites” on the task menu
2. Follow the instructions to select the source site
3. Set the replication options
4. Run the task

The options available to you during the task setup screens are detailed below. These correlate to the sections in the site settings page in SharePoint.

- **Look and feel**

In this section you can select the following options

- Site title, icon and description
- Tree view and quick launch navigation
- Theme settings
- Navigation (including top link and quick launch bars)
- Resetting pages to their site definition

- **Administrative settings**

In this section you can select the following options

- Search visibility
- Regional settings

- RSS settings

- **Users and permissions**

The Users and Permissions section includes:

- Anonymous access
- Access requests
- Unique or inherited security
- Users and groups
- Permissions levels and Permissions

In addition you can select the replication method:

- Exact replication – all settings from the source are replicated to the destination site. The permissions are mirrored
- Merged replication – Adds the permission settings from the source to the destination. It does not overwrite or delete security, it combines them.
- Custom replication – you can do a more granular replication by choosing more options.

Create site collections

Use this task if you want to create site collections in your SharePoint web applications

To configure this task:

1. Click the “Create sites” link on the task menu
2. Select the “Create site collections” option
3. Select the site template to base the site on
4. Fill out the spreadsheet with the details for your site collections
5. Run the task

This task allows you to specify details for your site collection including

Site template, relative Url, Title, description, primary login details and database details.

The **mandatory** fields for this task are:

- Relative Url
- Title
- Description
- Primary Login Name

When specifying the content database details, echo will ensure that your site collection is created in your desired content database. This is a feature that SharePoint does not have out of the box.

Create sub sites

Use this task if you want to create sub sites under existing site collections.

To configure this task:

1. Click the “Create sites” link on the task menu
2. Select the “Create sub sites” option
3. Select the template to use for the subsites
4. Fill out the spreadsheet with the details of your sub sites
5. Run the task

This task allows you to specify details of your sub sites, including the site template or an existing site, the relative url, title and description.

The **mandatory** fields are:

- Relative Url
- Title

Update Site columns and content types

Use this task if you want to copy or replace site columns and content types.

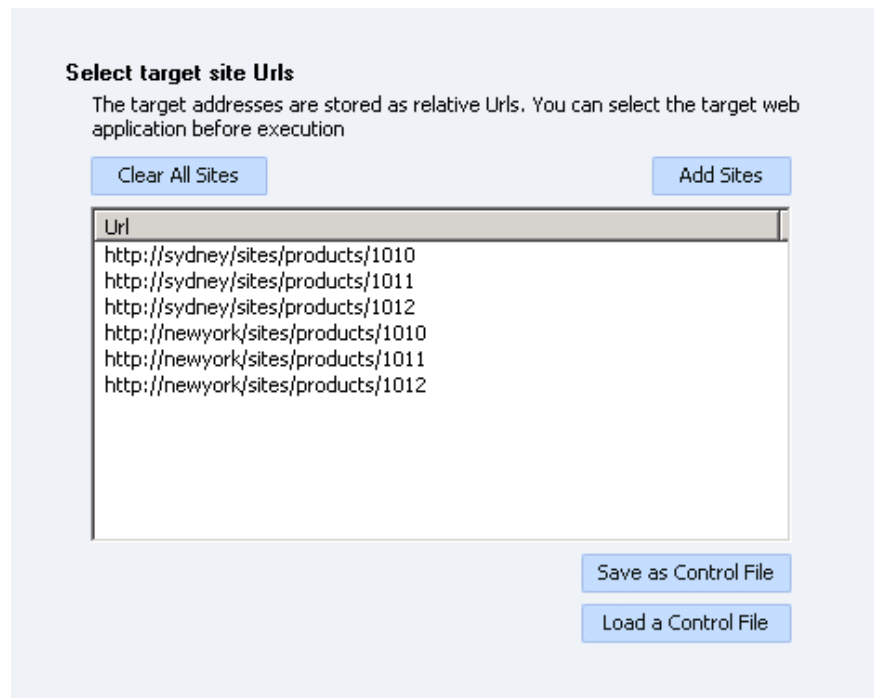
To configure this task:

1. Click the ‘Site Content Types and Columns’ on the task menu
2. Select the “Replicate site content types and/or site columns”
3. Specify the source site and select which site content types and/or site columns to be replicated
4. Specify your target sites
5. Select the replication options
6. Run the task

Destination Sites

This section explains how to interact with the destination sites step within the individual managers. This step is common to most managers and you can:

1. Select one or multiple destinations
2. Save the destinations to a file
3. Create a dynamic filter

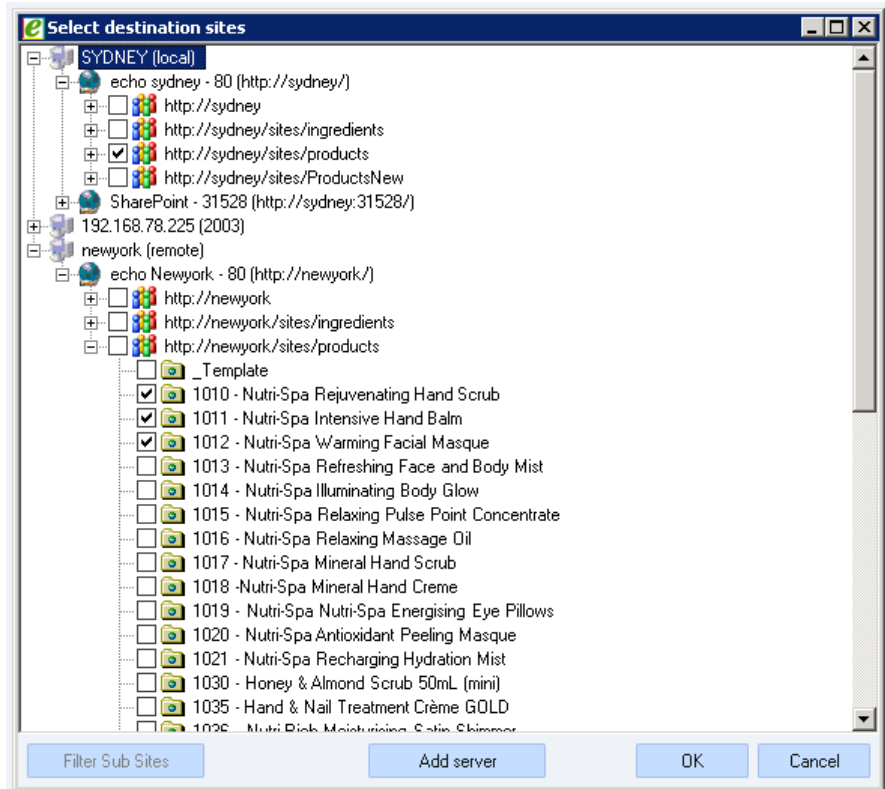


- **Select one of multiple destinations**

Click the Add sites button, then select the sites from the portal browser dialog, select the appropriate destinations from the portal browser.

Refer to “setting up remote locations” for information on connecting to external farms.

To select all sub sites you can right click on the desired node and select one of the options from the menu such as “All children recursively” or “All children” at that level.



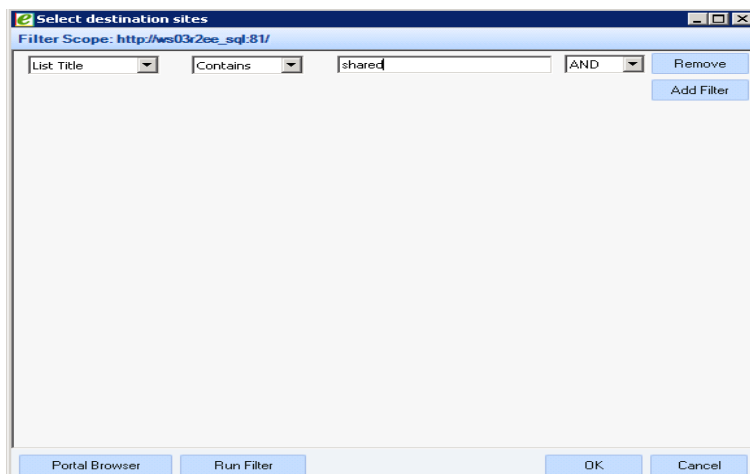
- **Save/loading destinations to/from a file**

Once you have selected the destinations and they appear in the destination list, you can save them for later use by clicking the option “Save as control file”

To load the destinations, click the “Load a control file” and then select the previously saved file.

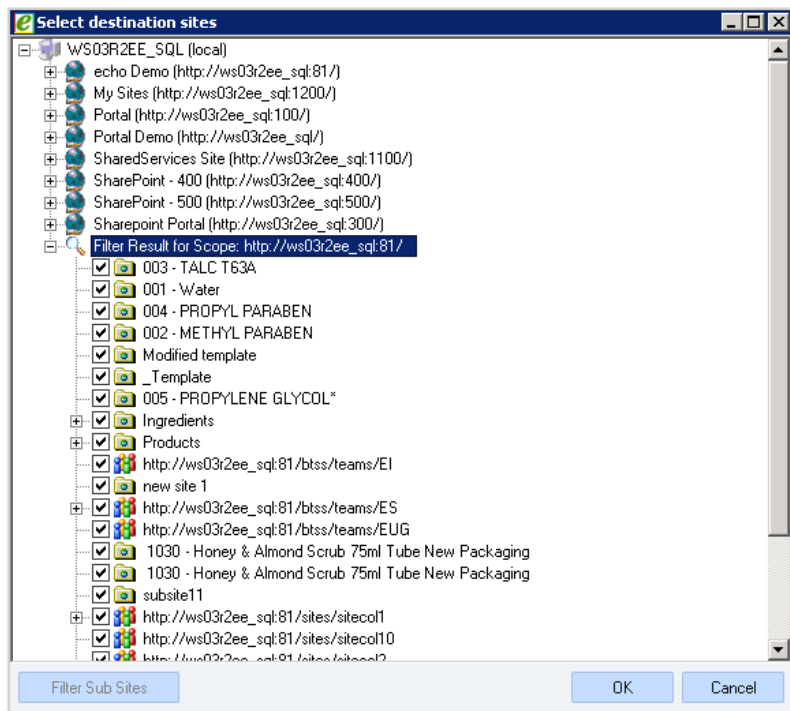
- **Create a dynamic filter**

A dynamic filter is a set of criteria that creates a result set. This destination set can be determined at runtime.



To do this:

1. On the portal browser, click on the web application
2. Click on the Filter Sub sites button
3. Add filters to the criteria
4. Click on Run Filter



5. Select the sites to be used as destinations.
6. Click OK

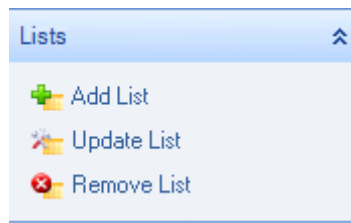
Maintaining Lists

This section explains how to use the List Manager in echo for SharePoint.

The List Manager is used to replicate settings from one SharePoint list (including document and form libraries) to a number of destinations.

The List Manager is used to:

1. Add lists
2. Update lists
3. Remove lists



Add Lists

Use this task if you want to add lists to a number of destinations based on the design of an existing list.

To configure this task:

1. Click the “Add Lists” link on the task menu
2. Select the source list
3. Select the destination sites
4. Set the replication options
5. Run the task

The replication options include:

- **Settings** – Title, description and navigation, document template, version settings and advanced settings,
- **Fields and content types** – the field/schema structure of the list
- **Views**
- **List permissions** – including permission masks, custom permissions, permissions for AD users, AD groups, Cross site groups and site groups.

Update Lists

Use this task if you want to update existing lists based on the design of an existing one.

To configure this task:

1. Click the “Update Lists” link on the task menu

2. Select the source list
3. Select the destination sites
4. Set the replication options
5. Run the task

Remove Lists

Use this task if you want to remove lists from existing sites.

To configure this task:

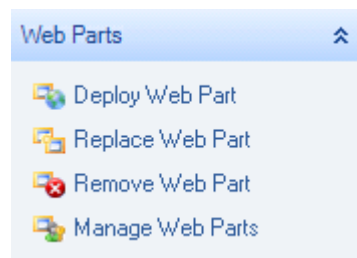
1. Click the “Remove lists” link from the task menu
2. Specify the criteria to match the destination lists
3. Specify the destination sites
4. Run the task

Web Parts Manager

This section explains how to use the Web Part Manager in echo for SharePoint.

The Web Part Manager is used to

1. Deploy a web part
2. Replace a web part
3. Remove a web part



IMPORTANT: echo requires the web part has already been installed properly on the farm. Echo replicates the design properties of the web part, it does not install the binaries or features.

Deploy a web part

Use this task if you want to deploy a web part to web part pages based on either an already configured web part in a web part page or from a web part definition file (.webpart or .dwp file).

To configure this task:

1. Click the “Deploy web part” link on the task menu
2. Select the source web part
3. Specify the destination sites
4. Specify the destination options (pages to target, web part zone and index)
5. Run the task

echo supports:

- The replication of most out of the box web parts, custom .net web parts and list view web parts – these are web parts that show a specific view of a list. These web parts are listed under the SharePoint Lists web parts in the add web part dialog in SharePoint 2007.
- Replication/replacement/removal of web parts to and from web part pages in document libraries and the forms folder.

At this stage the Data view web parts are not supported but are planned for a future release.

Replace a web part

Use this task if you want to replace an existing web part already deployed in a web part page.

To configure this task:

1. Click the “Replace web part” link on the task menu
2. Select the source web part
3. Specify the criteria to match the web part (by title, by class, by zone)
4. Specify the destination
5. Run the task

NOTES:

- If the web part does not exist on the destination page echo will skip the site.
- If more than 1 web part matches the destination criteria (for example 2 web part with the same title) echo will report failure on that destination, and move on to the next one

Remove a web part

Use this task if you want to remove a web part from multiple destinations.

To configure this task:

1. Click the “Remove web part” link on the task menu
2. Specify the criteria to match the web part (by title, by class, by zone)
3. Specify the destination
4. Run the task

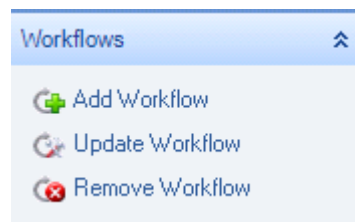
Note: You can use this task to remove error web part as part of your portal cleanup and maintenance by using class ‘ErrorWebPart’ as the criteria

Workflow Manager

This section explains how to use the Workflow manager in echo for SharePoint.

The Workflow manager is used to

1. Add workflows
2. Update workflows
3. Remove workflows



Echo supports:

- Out of the box workflows such as approval, collect feedback, etc.
- Custom .net workflows
- SharePoint Designer workflows
- Nintex Workflows

IMPORTANT: echo requires the workflow feature or solution has already been installed properly on the farm. Echo replicates the workflow design properties, it does not install the binaries or features.

Add workflow

Use this task if you want to add a workflow from an existing workflow in a list.

To configure this task:

1. Click the “Add workflow” link on the task menu
2. Select the source workflow
3. Select the destinations
4. Specify the list criteria
5. Run the task

Update workflow

Use this task if you want to update deployed workflows to lists in SharePoint.

To configure this task:

1. Click the “Update workflow” link on the task menu

2. Select the source workflow
3. Select the destinations
4. Specify the list criteria
5. Run the task

Remove workflow

Use this task if you want to remove deployed workflow in SharePoint.

To configure this task:

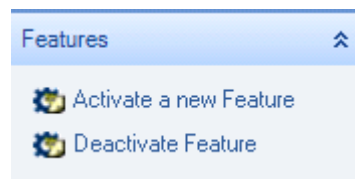
1. Click the “Remove workflow” link on the task menu
2. Select the source workflow
3. Select the destinations
4. Specify the list criteria
5. Run the task

Features Manager

This section explains how to use the Features Manager in echo for SharePoint.

The Features Manager is used to:

1. Activate features
2. Deactivate features



IMPORTANT: echo requires the feature has already been installed properly on the farm. Echo activate or deactivate features, it does not install the binaries.

Activate features

Use this task if you want to activate a feature in a number of sites or site collections

To configure this task:

1. Click the “Activate features” link on the task menu
2. Select the source feature from the list
3. Select the destinations
4. Run the task

Note: If the feature requires other features to be activated first, echo will activate them.

Deactivate features

Use this task if you want to deactivate a feature in a number of sites or site collections

To configure this task:

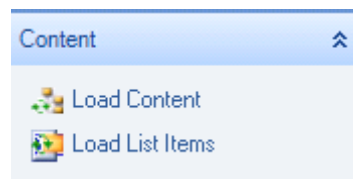
1. Click the “Deactivate features” link on the task menu
2. Select the source feature from the list
3. Select the destinations
4. Run the task

Note: Echo only deactivate selected feature.

Content Loader Manager

This section explains how to use the Content Loader Manager in echo for SharePoint. The Content Loader Manager is used to:

1. Load documents to SharePoint 2007 document libraries
2. Load list items to SharePoint 2007 lists



Content loader can retrieve content from the following sources:

- SharePoint 2003 (sites and areas) including versions and metadata values
- SharePoint 2007 including versions and metadata values
- File system (including network file shares)

Load documents to SharePoint 2007 document libraries

Use this task to load documents to document libraries.

To configure this task:

1. Click the link “Load content” from the task menu
2. Select “Load content”
3. Specify the schema to be targeted
4. Specify the files to be loaded (and their metadata values)
5. Specify the options during the upload
6. Run the task

Select the schema

During this step you can choose the method for supplying the metadata values for the destination files.

Use the default schema
 Use the default content type of the destination libraries

Use the following schemas Select schema(s)

Name	Description	Group	Scope
Product Document		echo demo	/

- Use the default schema – the default schema for the document library.
- Use the following schemas – Choosing this option allows you to fill in metadata values for the destination files. Fields of type choice and lookup will have the allowed values in the drop down list when supplying metadata in a later step.

Once you have specified the target schema, you can start adding files to the spreadsheet. You can achieve this by following these steps:

1. Clicking on the “Add files” button on the top right
2. Select the source type of the files (SharePoint, file system, Lotus notes, etc)

Set Content Type and Destination Cleanup Versions Add Files...

	A	B	C	D	E	F	G
1	Echo Status	Source Type	Source Name	Version	Approval Status	Destination	Destination
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							

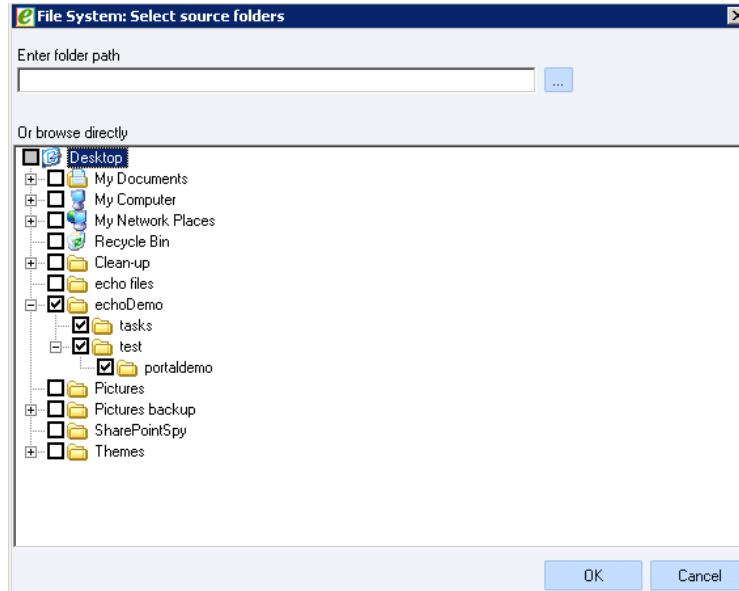
Save as Control File
Load a Control File

You have the choice of adding files from the following sources:

1. File system
2. SharePoint 2003
3. SharePoint 2007

Add files from File System

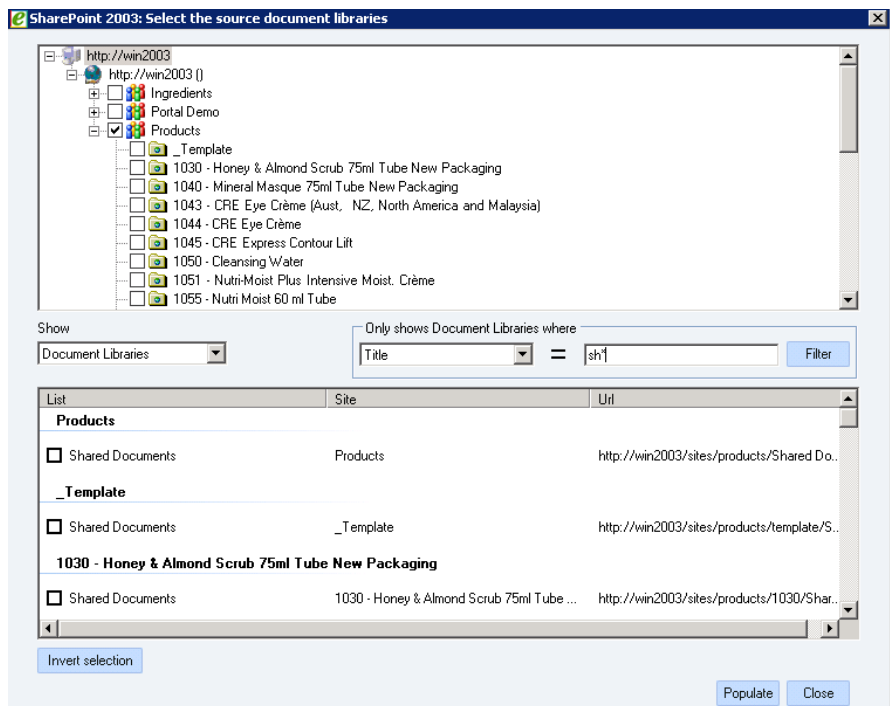
1. On the main content loader screen, click on the Select Document Libraries/Folders
2. Select the folders to be loaded from the screen



3. Click OK. This populates the details of the selected folders into the file grid. Click next to go to the following step.

Add files from SharePoint 2003/2007

1. On the main content loader screen, click “Select Document Libraries/Folders”



2. In the source document library dialog, select the location where the document libraries are stored.

3. Type in the criteria to match the document libraries with (for example document libraries where the title contains Sh*)
4. Click the “Filter” button. At this stage the bottom section of the dialog displays the matching document libraries (You can stop the search at any time by clicking the “Stop” button).
5. Select the libraries from which want to load documents (do this by ticking the check box for each library in the results list)
6. Click the “Populate” button. This gets the information for each of the files stored in the document library and populates the destination grid.
7. Click Close to return to the main screen.
8. You can further filter versions by choosing the desired option and clicking Apply. The default is set to All Versions.
9. Click Next to go to the following step.

Manage the main grid

1. Highlight each row and set the destination document library of where the content will be uploaded to by clicking set destination.
2. To move entries from the Default Content Type to specific content type, highlight the entries and click on Set Content Type. The entries are moved to the sheet associated with the selected content type and metadata associated with each entry will be populated.
3. To load content to specific folder in the destination document library, append the folder url to the destination url. For example, to upload test.docx to “folder 1” of Shared Documents, in the ‘Destination’ cell, enter “/sites/test1/Shared Documents/folder 1”
4. Use ‘Cleanup Version’ to combine multiple files into one entry with multiple versions in your destination document library. For example, if I want to group Proposal_draft.docx, Proposal1_backup.docx, and Proposal1_Final.docx in my file system into Proposal.docx in my destination, I highlight those entries in the main grid and use ‘Cleanup Version’. Note that Content Loader upload documents based on the entries in the main grid from top to bottom. Thus, to ensure Proposal1_Final.docx is the latest version in your destination document library, make sure it is placed at the lower row than the other proposal documents.

Saving the control file

You can save the main control grid to a Microsoft Excel file (xls) for users to continue filling the metadata values and destinations.

The control file will be saved together with the drop down values for the lookup and choice fields.

IMPORTANT: DO NOT modify or delete the echo required worksheet in the exported control file.

Loading the content

The last step in the content loading is to run the task.

Load list items to SharePoint 2007 lists

Use this task to load list items to SharePoint lists. The steps are similar to the previous section for loading content to SharePoint 2007 document libraries.

To configure this task:

1. Click the link “Load list items” from the task menu
2. Select “Load content”
3. Specify the schema to be targeted
4. Specify the list items to be loaded (and their metadata values)
5. Specify the options during the upload
6. Run the task

Updating existing document or list metadata

If you wish to update existing document metadata then follow these steps:

1. Start a content loader task
2. Select the target schema
3. Add files from your SharePoint 2007 document library
4. Set the destination of the files to be the same as the source Url
5. Modify the metadata values of the files to be modified
6. IMPORTANT: Set the option to “Update Metadata Only”
7. Run the task

Specifying metadata

This section applies to both the document and list loading tasks.

Once you have added files or list items from the different sources, you can then specify the metadata values to be loaded in the main spreadsheet control.

There are a number of special fields in the control grid that can be modified

Internal Fields

- **Echo Status**

By default it is set to Ready. After the load this field will be set with the resulting status (Successful, Error)

- **Source Type**

This is read only and it represents the kind of source system to read the content from.

- **Source Name**

This is the filename to the location of the source content.

- **Source Folder**

This is the path or Url to the source folder location

```
http://server/topics/document library  
http://server01:81/sites/projects/shared documents  
http://server02/image library
```

- **Destination**

This is the relative Url of the destination location. It may contain folders

```
/topics/document library/folder1  
/sites/projects/shared documents  
/image library
```

- **Destination Filename**

This is the filename of the destination. It can be different from the original source filename.

- **Version**

This field is retrieved from the source system for information purposes. The versions are incremented as files are added to the destination system.

- **Approval Status**

The values are Approved, Denied, Draft, Pending, Scheduled. These represent the status of the file/item when it is loaded to the destination.

- **Author/Editor**

This the login name of the user that created or modified the item/document. It must be specified in the form of DOMAIN\username. For example:

```
ACME\john
```

If the user does not already exist in the site collection, then it is added to the Limited Access role.

- **Modified Date / Created Date**

This is the date in which the file was created or modified. It is specified as GMT +0 format.

Special Fields

These are the special formatting of fields in the control grid

- **Choice / Lookup Fields**

These are the choice and lookup fields which are shown as drop downs in the control grid.

- **Multi choice**

Multiple choice values are separated by the default delimiter of ;#. For example:

```
 ;#Choice 1;#Choice2
```

- **Hyperlinks**

Hyperlinks values are composed of 2 parts: [URL],[Description]. For example

```
http://www.echotechnology.com,More...
```

- **Attachments Url**

This field is used to load multiple attachments to list items. Attachment files are separated by the delimiter ;#. For example

```
C:\file1.doc;#d:\folder\file2.xls
```

- **Dates**

Date values are specified in GMT +0

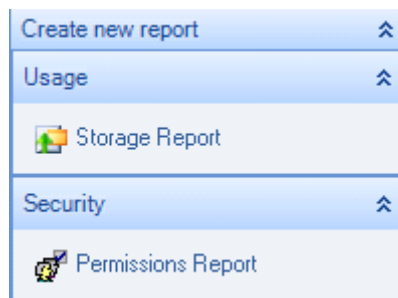
Reports Manager

This section covers the following reports:

1. Storage reports
2. Permission reports



To access the reports manager click on the “Analyze/Audit” toolbar button across the top.



Storage Reports

Use this manager to report on the storage usage by

- Site collection
- Site (sub webs)
- Document Libraries
- Lists

Echo allows you to export the results to a Microsoft Excel spreadsheet. The columns exported by echo are:

- Type (possible values are: site collection, web, document library, list)
- Items (number of items for each type)
- Site Collection URL
- URL
- Size (bytes)
- Size (MB)
- Owner (applies to site collections)
- Last Modified

The Items column shows the following information

Type	Items
Site collection	Number of sub webs

Site (sub web)	Number of lists
Document Library	Number of documents
Lists	Number of items

Permission Reports

Use this manager if you want to:

- Find out what permissions a user has been granted or denied
- Find out what permission levels (roles) as user has been granted or denied

This manager allows you to

- Produce a report grouped by location or user.
- Optionally include all lists or selected lists in the analysis
- Connect to an Active Directory source to expand the AD group membership if necessary.
- Permissions by location allow you to further filter by
 - Permission level (Read, Design, Contribute, etc or customer permission levels)
 - Or Permission masks (View items, Add items, view pages, etc)

Batching and Scheduling

This section explains how to use the batching and scheduling features of echo for SharePoint.

An echo batch is a group of tasks that can be executed to run immediately or to be scheduled for execution at a later time.

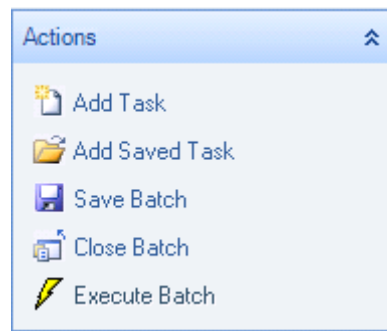
To access the batching screens, click on the “Batches” toolbar button across the top.



Creating a batch

To create a batch:

1. Select the Batches option from the toolbar.
2. Select the Tasks group from the left hand side
3. Create a new task (or add a previously saved task)
4. Configure the task
5. Click on Save batch
6. Select a filename and location
7. Click OK to save the batch.



Opening a saved batch

Use this option to open a previously saved batch

To open a batch:

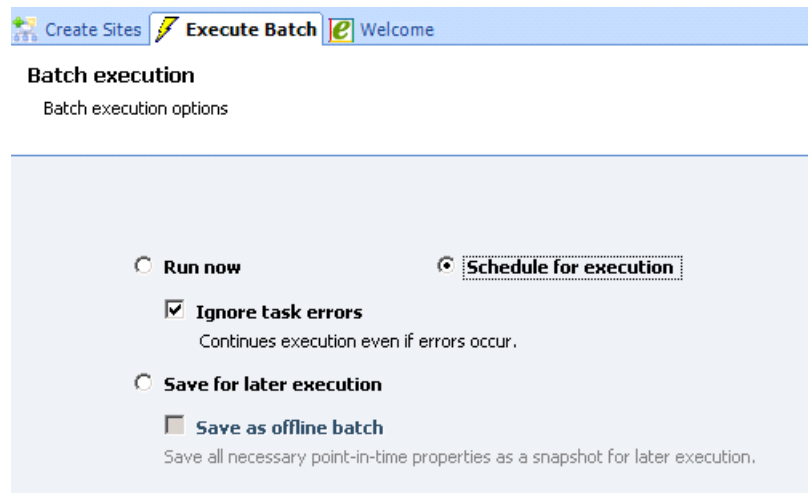
1. Select the Batches option from the toolbar
2. Select the Saved group from the left hand side
3. Click Load batch
4. Select a batch file from the saved location
5. Click OK

Executing a batch immediately

- To execute a batch
- Select the Execute Batch tab
- Select the option “Run Now”
- Click Finish

Scheduling a batch

- To schedule a batch
- 1. Select the Execute Batch tab
- 2. Select the option “Schedule for execution”
- 3. Click Finish
- 4. Save the batch file
- 5. Setup a schedule on the Windows Scheduler dialog



IMPORTANT:

To setup the scheduled task to run even if the current user is not logged on, you need to supply a user name and password via the “Set Password” option in the Windows Scheduler dialog.

