

Automate the Management of Bulk Data Synchronization Rules

Leverage Integrations with Best-in-Breed Applications

Maintain Data Governance



Solution Overview

Echo Automate is a powerful product extension to our [Echo Content Synchronization](#) product designed to automate provisioning of Echo Content Synchronization rules in your organization. Automate the time-consuming process of creating, maintaining, and executing large volumes of meta-rules, including synchronization rules, between applications. This no-code meta-rule manager eliminates manual processes, reduces IT administration, and improves productivity while maintaining Information Governance.

Support remote workers and simplify the provisioning, management, and governance of content when using MS Teams, Filevine, and many other best-in-breed applications. Even if you're already using a provisioning tool, Echo Automate can be included in the process to automatically sync files to your DMS.

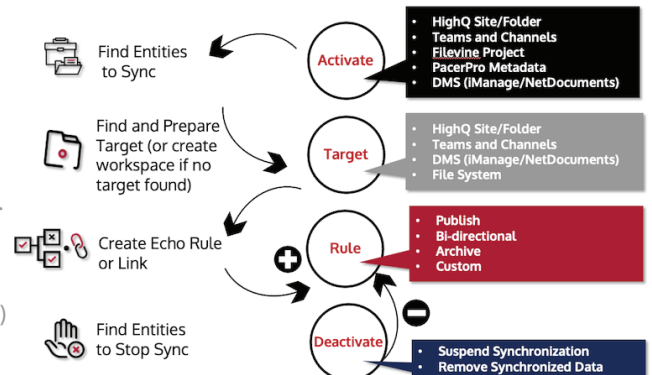
Key Features

- ✔ Automate the process of managing the entire life cycle of meta-rules
- ✔ Save time by utilizing **Echo Automate Templates** to configure meta-rule workflows:
 - Map source and target system endpoints
 - Activate specified meta-rules based on triggers or state
 - Find and prepare target(s)
 - Dynamically generate target workspace if it does not already exist (utilizes iManage templates for iManage workspaces)
 - Create Echo sync rules and/or links between source and target
 - Automatically run sync rules (**One-way sync**, **Two-way sync**, or **Archiving**)
 - Suspend sync rules and remove synced content based on triggers or state
- ✔ Maintain full administrative oversight and control with the **Echo Automate UI** - Manage meta-rules and the rules created from them:
 - **Dashboard** - see the current configuration of the meta-rules and summary statistics
 - **History** - view all rule actions, including creation, suspension, etc.
 - **Error Log** - shows all errors that occur
 - **Projects** - lists all rules created and their status (tab is configured to your specific entity's naming, e.g., projects, worksites, site, etc.)
- ✔ Choose optional email error reporting to expedite troubleshooting
- ✔ Schedule, manually run, suspend meta-rules, and more with the same options as an Echo synchronization rule
- ✔ Retain audit history data and run detailed reports even after a meta-rule has suspended a sync and archived content

Business Benefits

- Streamline processes, improve service delivery, and reduce or contain costs by automating bulk synchronization rules
- Eliminate manual processes to free up valuable IT time for other mission critical projects
- Optimize business processes by expediting the management of large-scale meta-rule tasks
- Save time and money by tying into existing provisioning tools or processes, such as AvePoint
- Future-proof your technology investments with a scalable solution designed to grow with your organization

SeeUnity Echo Automate Templates



Working Behind the Scenes to Improve Productivity



500+ Customers



20+ Countries

Automate the Management of Bulk Data Synchronization Rules

Scale the organization's capability to administer metadata synchronization rules.

Improve process efficiencies by automating the management of large quantities of content synchronization rules between your DMS and systems like Filevine, Microsoft Teams, and Thomson Reuters' HighQ Collaborate. Eliminate manually managing the creation, flow, and suspension of 100s to 10,000s of meta-rules. Save time and money while enabling IT to focus on other critical tasks. (See our complete list of applications below, including iManage and NetDocuments.)

Echo Automate is highly configurable to fit your use case. Even if you're utilizing an existing provisioning tool, Echo Automate can tie into those processes and automatically establish synchronization of content between systems.

Leverage Integrations with Best-in-Breed Applications

Optimize business processes and reduce costs.

Let users seamlessly collaborate in real time while working from within the most efficient systems to complete their tasks. Echo products expedite the flow of data from one system to another and ensure people are receiving the information they need without delays or errors.

Maintain Data Governance

Especially with remote workers, it's challenging to maintain control over content created outside of the DMS.

Integrating your DMS with collaboration applications like MS Teams streamlines processes for users without sacrificing governance. Enable efficient workflow with end-to-end governance by automating processes:

- Match or generate the DMS workspace when a new e.g., MS Teams site is created
- Create and initiate content synchronization between those entities
- Suspend the sync when a project is over, and archive all content back to the DMS
- Archive existing Teams sites to DMS



Echo Automate adds another dimension to the Echo Content Synchronization product's administratively driven or user driven sync options. Automating bulk meta-rules and sync rules will streamline processes, improve service delivery, and reduce or contain costs.

- Dan Hunsinger, CTO

CONNECT TO ALL OF YOUR BUSINESS APPLICATIONS

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|---------------------|--------------|-------------------------|-------------|
| Alfresco | Dropbox | iManage | PacerPro |
| Amazon S3 | Dynamics | Kira Systems | Safelink |
| Anaqua's PATSY WAVE | eDOCS | Litera Transact (Doxly) | Salesforce |
| Azure Storage | Exchange | NetDocuments | SharePoint |
| Box | Filevine | Office 365 | SimplyAgree |
| Content Server | Google Drive | OneDrive | Teams |
| Documentum | HighQ (TR) | Opus2 | Worldox |