

Echo Content Synchronization for AQX®

Document Management Systems and File Management Integrations

DATA SHEET

Now, more than ever before, organizations are evaluating ways to improve operational efficiencies and reduce costs to remain competitive and better meet customer needs.

Firms are embracing cloud-based applications, integration technologies, and collaboration tools to keep remote workers, clients, and business partners connected and working efficiently.*

Integrating the firm's essential systems helps IT combat the significant time and money investment required to maintain separate systems. Connecting systems simplifies user's workflow while keeping content in a centralized location.



**Streamline IP management workflow
with connectivity to your firms' other essential systems.**

Echo for AQX enables you to securely integrate Anaqua's AQX with your document management system (DMS) or file management system. Echo is an API-based enterprise content synchronization solution designed to automate processes, support internal and external collaboration, and help improve Information Governance and data compliance.

Build in Efficiency – Integrate and Automate

Users work as they normally do with AQX content, such as patent records and associated documents and metadata. Echo works in the background, automatically synchronizing any document updates or new documents added to the corresponding DMS workspace, on an ongoing, and scheduled basis.

As new records are created in AQX, Echo detects the new record and searches for its appropriate workspace based on client and matter metadata. If found, Echo connects the two spaces and begins an ongoing, one-way sync of mapped content. If no workspace is found, Echo automatically creates a workspace with the appropriate structure, and begins the content sync from AQX to the DMS. Optionally, a two-way sync can be utilized. Users work as they normally do, in either AQX or the DMS, as document updates and additions are automatically synced to the opposite system.

Build in Data Governance and Security

Integrating AQX with your organization's DMS ensures content created outside the DMS gets automatically placed in the repository of record. Echo retains a detailed audit and sync history to simplify compliance efforts.

KEYS TO EFFICIENCY

CONTENT INTEGRATION & PROCESS AUTOMATION

Reduce siloed information

Improve efficiency and productivity

Support collaboration

Manage content and processes at scale

Meet compliance standards

Maintain Information Governance

Keep content in the Repository of Record

* [2021 Wolters Kluwer Future Ready Lawyer report](#): "(the) Majority of corporate lawyers expect changes in how their legal departments deliver services: 84%, Greater Use of Technology to Improve Productivity tops the list," with 80% Greater collaboration & transparency between law firms & clients, and third, 78% Increased emphasis on innovation.

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Echo Solution Key Features

Manage Content

- Manage content between systems (on-premise, hybrid, cloud).
- Maintain full administrative oversight and control of sync rules using the Echo Management Studio.
- Sync content on a configurable and scheduled basis.
- Configure sync rules based on triggers.

Automate Processes

- Eliminate the time-consuming process of creating and maintaining DMS workspaces that correspond with AQX records.
- Automatically sync content, metadata, and security between AQX and your DMS or file management system. Sync from AQX to the DMS, or utilize a two-way sync between systems to enable secure and efficient collaboration.
- Automatically sync content with no user interaction needed.

Reporting and Notifications

- Configure email notifications for administrators to receive document sync confirmations.
- Use convenient error reporting to help troubleshoot any issues.
- Retains detailed audit and sync history data.



Modules Supported

- **Invention**
- **Patent**
- **Agreement**
- **General Matters**
- **TM Application**
- **TM Search**
- **TM Clearance**
- **Conflicts**
- **IP Reviews**
- **Design**
- **Design Application**

A subset of fields specific to each module are currently supported as well as some Record, Contact, and Additional Field data.



SECURELY CONNECT AQX TO ALL YOUR BUSINESS APPLICATIONS

DMS

iManage
NetDocuments
OpenText eDOCS, &
Content Server

Document Management and File Sharing Systems

Microsoft 365
SharePoint
Teams
OneDrive
Azure
HighQ

Google Drive
Box
Dropbox
Litera Transact (Doxly)
Filevine
Opus2
SimplyAgree
File shares

[Complete list of connectors: seeunity.com/#front-page-4](https://seeunity.com/#front-page-4)



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