

Echo Content Synchronization for PATTSY WAVE®

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 PATTSY WAVE enables you to securely integrate Anaqua's PATTSY WAVE 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 can conveniently collaborate by working as they normally do, either in the PATTSY WAVE application, or in the DMS, with content, such as matters and their associated documents and metadata. Echo works in the background, automatically synchronizing any document updates or new documents added to the corresponding location in the opposite system, on an ongoing, and scheduled basis.

As new matters are created in PATTSY WAVE, Echo detects the new matter and searches for its appropriate DMS workspace based on client and matter metadata. If found, Echo then searches for the corresponding PATTSY WAVE folder within the workspace. If found, Echo connects the two spaces and begins a content sync. If no workspace or folder is found, Echo automatically creates a new workspace with the appropriate PATTSY WAVE folder, and begins the sync process.

Firms can configure Echo to keep only stub files of documents in PATTSY WAVE, essentially archiving the actual up-to-date documents to the DMS to maintain one source of truth. Users can still access and edit documents that reside in the DMS from within PATTSY WAVE, taking advantage of the native DMS versioning and functionality.

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**

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Echo Solution Key Features

Manage Content

- Manage content between your systems (on-premise, hybrid, cloud)
- Maintain full administrative oversight and control of sync rules using the Echo Management Studio
- Sync content one-direction (archive from PATTSY WAVE to the DMS), or in two-directions between the systems
- Edit documents while working in PATTSY WAVE, with DMS functionality and versioning

Automate Processes

- Eliminate the time-consuming process of creating and maintaining DMS workspaces that correspond with PATTSY WAVE matters
- Upon initial implementation, and as new matters are added, Echo automatically creates a DMS workspace for each PATTSY WAVE matter and a PATTSY WAVE sync folder within each workspace (or, if a workspace already exists, Echo creates the PATTSY WAVE folder and begins the content sync)
- Automatically sync matter content, metadata, and security between PATTSY WAVE and your DMS or file management system on an ongoing basis, scheduled basis (configure to run every one minute or longer)

Reporting and Notifications

- Configure email notifications for admins to receive document sync confirmations



Modules Supported

- **Patents**
- **Trademarks**
- **General Matters**
- **License Agreements**

Configurable Options

Archive content from PATTSY WAVE to the DMS or file sharing system, keeping only a stub file in PATTSY WAVE that links to the document in the DMS for editing.

Or, sync the documents to both systems and leave stub files in the PATTSY WAVE matter for editing.



SECURELY CONNECT PATTSY WAVE 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



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