ANAQUA®

Simplify the management of meta-rules for large-scale content synchronization projects

Echo Automate is a powerful product extension to our **Echo Sync** product designed to automate provisioning of Echo Sync 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 and frees up valuable IT time.

Support remote working and simplify provisioning, managing, and governing 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.

Echo Automate – 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)
  - 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 over meta-rules with the **Echo Automate UI** - Manage meta-rules and the rules created from them from these tabs:
  - **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

- Simplify 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

Echo Automate

Automate the Management of Bulk Data Synchronization

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, MS Teams, and 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 your processes and automatically synchronize content between systems.

Leverage Integrations with Best-in-Breed Application

Optimize business processes and reduce costs.

Allow users to work in the most efficient system(s) for their workflow. Take advantage of Echo Automate, in conjunction with Echo Sync, to expedite the flow of data from one system to another. Ensure the right people are receiving the real-time 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 the process of matching your DMS workspaces with e.g.,Teams sites, creating content synchronization rules between systems, suspending the sync when a project is over, and even automatically archiving that content back to the DMS.

CONNECT TO ALL YOUR BUSINESS APPLICATIONS

Aderant	Dropbox	Legal Tracker	Safelink
Alfresco	Documentum	Litera Transact	Salesforce
Amazon S3	Dynamics	Lifty	Sharepoint
Anaqua AQX	eDOCS	Microsoft 365	SimpleLegal
Anaqua Innovation Mgt	Elite (3E)	NetDocuments	SimplyAgree
Anaqua PATTSY WAVE	Exchange	Opus 2	Teams connect
Azure AD	Filevine	OneDrive	Teams
Azure Storage	HighQ	Onit	TyMetrix 360
Box	Google Drive	PacerPro	Universal File
Brightflag	iManage	Passport	WiseTime
Content Server	Kira Systems	SAP Succes Factors	Worldox
			Workday

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