

PATTSY WAVE Sync

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.**

PATTSY WAVE Sync enables you to securely integrate Anaqua's PATTSY WAVE with your document management system (DMS) or file management system. PATTSY WAVE Sync 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. PATTSY WAVE Sync 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, they are automatically detected by PATTSY WAVE Sync and it searches for the appropriate DMS workspace based on client and matter metadata. If found, it then searches for the corresponding PATTSY WAVE folder within the workspace. If found, the two spaces are connected and a content sync begins. If no workspace or folder is found, PATTSY WAVE Sync automatically creates a new workspace with the appropriate PATTSY WAVE folder, and begins the sync process.

Firms can configure the integration 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**

**Manage content and
processes at scale**

Eliminate manual processes

**Keep content in the
Repository of Record**

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Integration 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 Management Studio.
- Sync content one-direction (archive from PATTSY WAVE to the DMS), or in two-directions between the systems. Works with iManage and NetDocuments.
- Edit documents while working in PATTSY WAVE, with DMS functionality and versioning.

Automate Processes

- Upon initial implementation, and as new matters are added, PATTSY WAVE Sync 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, it 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).
- Complements PATTSY WAVE's AutoDocket® & Download feature which detects documents in your USPTO Private PAIR and TSDR portfolios. Then it automatically downloads the corresponding documents to the respective matters and docket the necessary reminders. With the DMS integration, these documents are subsequently synced to the corresponding workspace in your DMS.



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



Aderant
Amazon S3
Anaqua AQX
Anaqua Innovation Mgt
Anaqua PATTSY WAVE
Azure AD
Azure Storage
Box
Brightflag
Content Server

Documentum
Dropbox
Dynamics
eDOCS
Elite (E3)
Exchange
Fiveline
HighQ
Google Drive
iManage

Kira Systems
Legal Tracker
Litera Transact
Litify
Microsoft 365
Mitratach
NetDocuments
Opus2
OneDrive
Onit

PacerPro
Passport
Safelink
SAP Success Factors
Salesforce
SharePoint
SimpleLegal
SimplyAgree
TeamConnect
Teams

TyMetrix 360
Universal File
WiseTime
Worldox
Workday



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