

Intapp Flow Power User Essentials

Intapp Flow Power User Essentials is the core training that ensures your success in using, configuring, and supporting Intapp Flow.

Who should take this course?

Intapp Flow Power User Essentials is designed for:

- Business Analysis and others that would benefit from deepening their knowledge of Intapp Flow, including power users and IT team members
- New system administrators responsible for the setup, configuration, and maintenance of their firm's Intapp Flow infrastructure

What will you learn in this course?

Upon completion of this course, you will be able to:

- Create new workflows and forms to support your business process
- Customise your application, including system settings, user configuration, integrations, and security settings
- Integrate Flow data with external systems
- Build and test Integrate rules
- Resolve common troubleshooting issues



Business value

- **Make the most of your investment:** Unlock additional feature value by learning tips and tricks to increase efficiency and improve performance
- **Accelerate time to value:** Shorten the ramp up time for system administrators and other key staff members, enabling them to make an impactful contribution with Intapp Flow quickly
- **Increase firm independence:** Take ownership of your business workflows, reports and configurations, and simplify change management by reducing your dependency on third party providers
- **Identify and resolve issues faster:** Keep your business on track and maximize user productivity

Modules and topics

Getting around Intapp Flow

- Understand the application UI
- Create new requests
- View and manage existing requests

Data management

- View clients, matters and parties
- Add custom fields
- Modify data layout

Requests

- Create and manage requests
- Understand request states
- Design notifications

Form and workflows

- Define form questions and configuration
- Configure workflows
- Link forms to workflows
- Understand environment model

User management

- Configure user settings
- Understand groups and group memberships
- Review Roles, Groups and Teams

Integrate

- Develop and test rules
- Design data sync processes
- View the Rule Log

System administration

- Configure External Providers
- UI customization
- Troubleshoot common errors
- Review application infrastructure

Integrations

- Configure data sources
- Define Intapp Integrate integrations
- Using integrations with firms

Flow data model

- Data management
- Database model
- Sync data from external systems

Notifications

- Create global and local notifications
- Design notification templates
- Work with custom data objects

API

- Automate data synchronizations
- Manage Request states
- Troubleshoot common errors

Deployment

- Moving forms and workflows between systems



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