

## 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
- Customize 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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