

## Intapp Intake and Conflicts Administrator Essentials

Intapp Intake and Conflicts Administrator Essentials is the core training that ensures your success in administering, configuring, and supporting Intapp Intake and Intapp Conflicts.

### Who should take this course?

Intapp Intake and Conflicts Administrator Essentials is designed for:

- New system administrators responsible for the setup, configuration, and maintenance for their firm's Intapp Intake and Conflicts infrastructure.
- Business analysts and other people that would benefit from deepening their knowledge of Intapp Intake and Intapp Conflicts, including power users and IT team members.

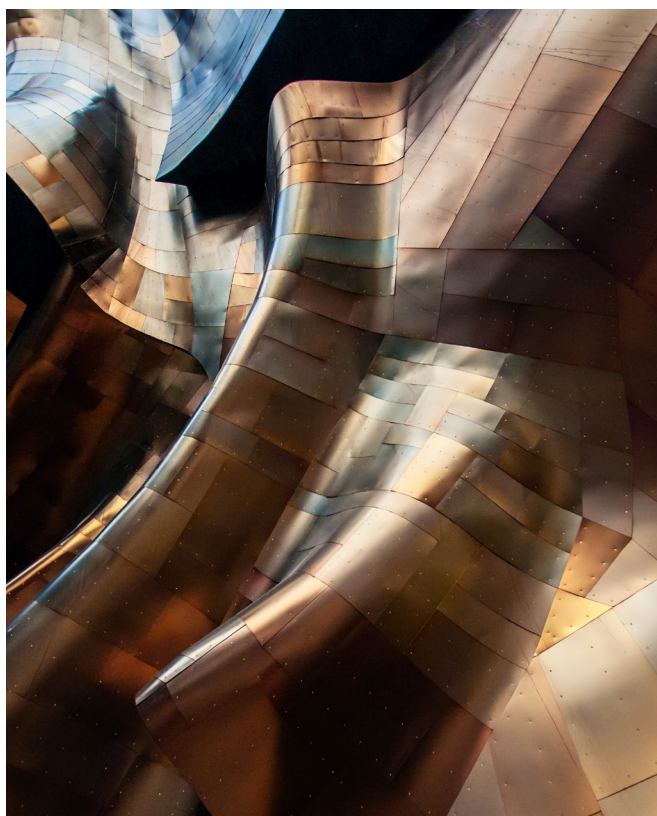
### What will you learn in this course?

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

- Customize your application, including system settings, user configuration, integrations, and security settings
- Create new workflows and forms to support the intake process
- Configure conflicts reports to meet your firm's needs
- Integrate Intake and Conflicts data with external systems
- 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 a highly effective contribution with Intapp Intake and Intapp Conflicts quickly
- **Reduce vendor dependency:** Create new workflows, reports and configurations without third-party applications
- **Proactively prevent data and database issues:** Maintain the system properly to avoid errors and bad data
- **Resolve issues faster:** 50% of all support cases submitted to Intapp could be resolved internally within the firm by a trained team member



# Modules and Topics

## Data management

- View Clients, Matters, and Parties
- Add custom fields
- Modify data layout

## Conflict searches and reports

- Define conflict rules
- Search conflicts
- Resolve conflict reports
- Manage conflict data
- Run quick searches

## Requests

- Create and manage requests
- Understand request states

## Forms

- Define form questions and configuration
- Form administration and maintenance

## Integrations

- Understand integration types
- Use integrations with forms

## Users and groups

- Configure user settings
- Understand groups and roles
- Apply capabilities and permissions

## Workflows

- Create workflows
- Manage workflow states
- Link forms to workflows



## Notifications

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

## System administration

- Review common settings
- UI configuration
- Dashboard configuration

## API

- Explain API functionality

## Deployment

- Applying hot fixes to Intake and Conflicts

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