

To perform work on behalf of another person in Intapp One Place, proxy users can switch to that person's profile and work on behalf of them. When logged into Intapp OnePlace under another user's profile, the proxy will have the same capabilities, read/write access, dashboards, views, etc. as the user they are working on behalf of.

Data Audit

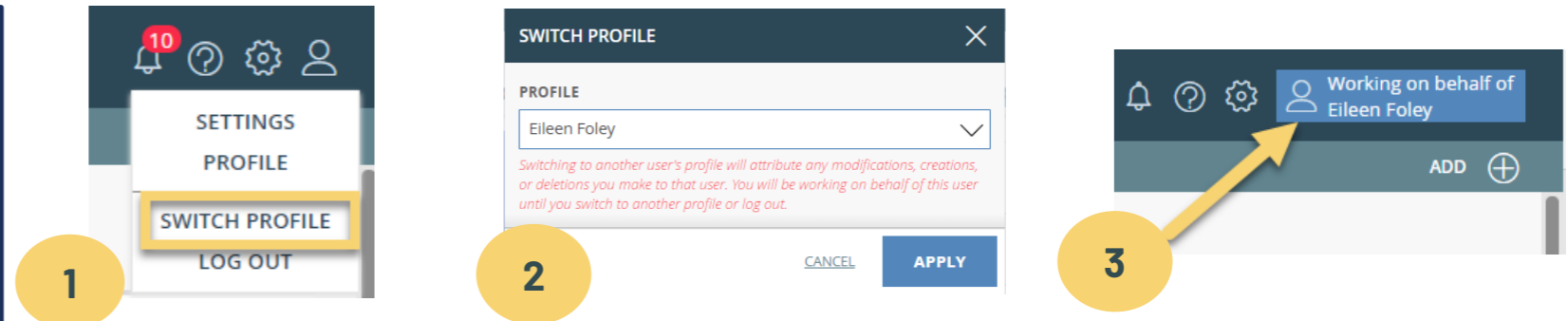
Any changes (creations, edits, deletions) made by the proxy will be attributed to the user they are working on behalf of. In the Data Audit, there will be a column called 'Proxy.' This column will display the proxy's name beside any and all changes that the proxy made while working on behalf of another user.

SUBJECT				
VALUE	Lunch meeting with Aamnda			
ENTRY	Lunch meeting with Aamnda			
LIST	Meeting/Note			
SOURCE	Web			
ENTERED BY	Eileen Foley			
DATE	05/06/19 10:22 AM			

History				
VALUE	ENTERED BY	SOURCE	DATE	PROXY
Lunch meeting with Aamnda	Eileen Foley	Web	05/06/19 10:22 AM	Dana McCarthy

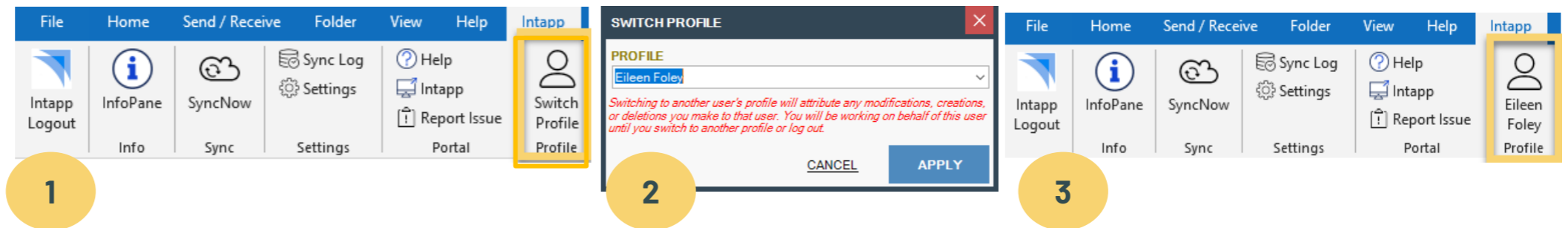
Switching to Another User's Profile in the Web Portal

1. Click **Profile** at the top right of the browser page. Choose **Switch Profile**.
2. Select the individual you need to work on behalf of in the Profile dropdown.
3. Click **Apply**.



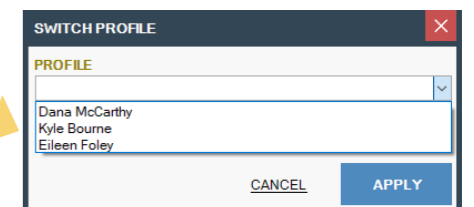
Switching to Another User's Profile in Outlook

1. Click the **Switch Profile** button on the Intapp OnePlace Outlook ribbon.
2. Select the individual you need to work on behalf of in the Profile dropdown.
3. Click **Apply**.



Returning Back to Your Profile

Once finished working on behalf of another person, you can click the **Profile** icon again, choose **Switch Profile** and select yourself from the Profile dropdown.

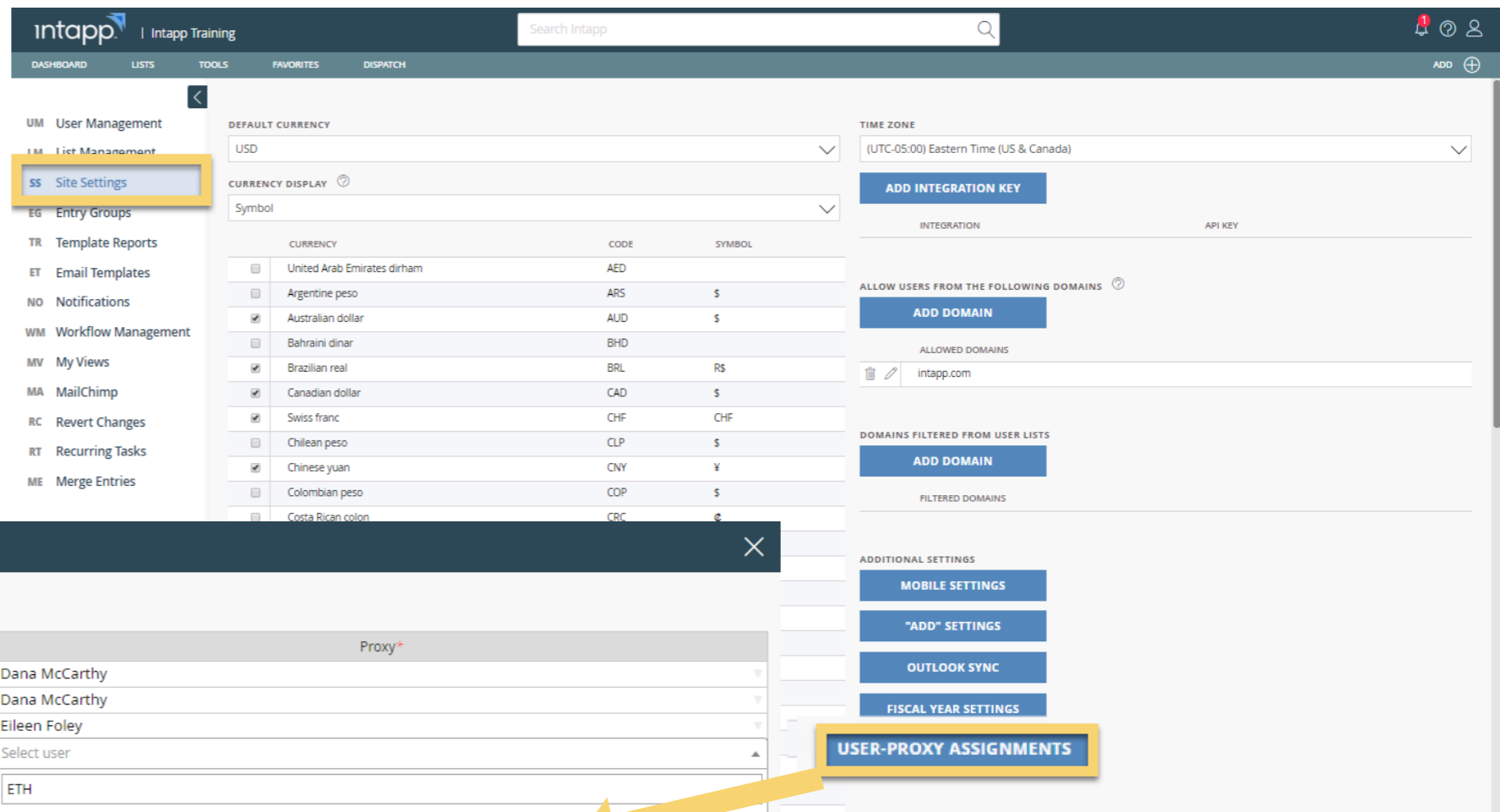


Note: Proxy users first need to be paired with users for which they will be working on behalf of by a user with permission to Manage Proxy Assignments.

To perform work on behalf of another person in Intapp OnePlace, proxy users can switch to that person's profile and work on behalf of them. Proxy users first need to be paired with users for which they will be working on behalf of by a user with permission to Manage Proxy Assignments.

How to Assign Proxy Users

1. Navigate to **Tools > Site Settings**
2. Click into **User-Proxy Assignments** under the **Additional Settings** area at the bottom right
3. Enter the assignments for proxy users. The person who will be acting as the proxy should be selected in the **Proxy** column and the person who needs someone to have the capability to act on behalf of them should be selected in the **User** column.
4. Click **Save**



The screenshot shows the Intapp OnePlace interface. On the left, a sidebar menu has 'Site Settings' highlighted. The main content area shows 'DEFAULT CURRENCY' set to USD and 'TIME ZONE' set to (UTC-05:00) Eastern Time (US & Canada). Below this is a table of currencies with checkboxes for selection. On the right, there are buttons for 'ADD INTEGRATION KEY', 'ADD DOMAIN', and 'ADDITIONAL SETTINGS'. The 'ADDITIONAL SETTINGS' section has 'USER-PROXY ASSIGNMENTS' highlighted. A modal window titled 'USER-PROXY ASSIGNMENT' is open, showing a table with columns 'User' and 'Proxy'. The table contains five rows of assignments. A dropdown menu is open for the 'Proxy' column of the fifth row, showing 'ETH' and 'Ethan Brewer'.

	User*	Proxy*
1	Kyle Bourne	Dana McCarthy
2	Eileen Foley	Dana McCarthy
3	Ethan Brewer	Eileen Foley
4	Kyle Bourne	Select user
5		ETH Ethan Brewer ethan.brewer@intapp.com

Example Proxy Assignment

Saar Menachemi is the user who requires a proxy to be enabled with the permission to act on behalf of him. Saar is the User and Eileen is the individual who has been selected as his Proxy. Eileen will be able to switch to Saar's profile and perform all actions Saar is permitted to (create, edit and/or delete entries) on his behalf.

Proxy Capabilities

When logged into Intapp OnePlace under another user's profile, the proxy will have the same capabilities, read/write access, dashboards, views, etc. as the user they are working on behalf of. Be sure that your proxy assignments are in line with any user permissions your firm needs to control.