View Builder

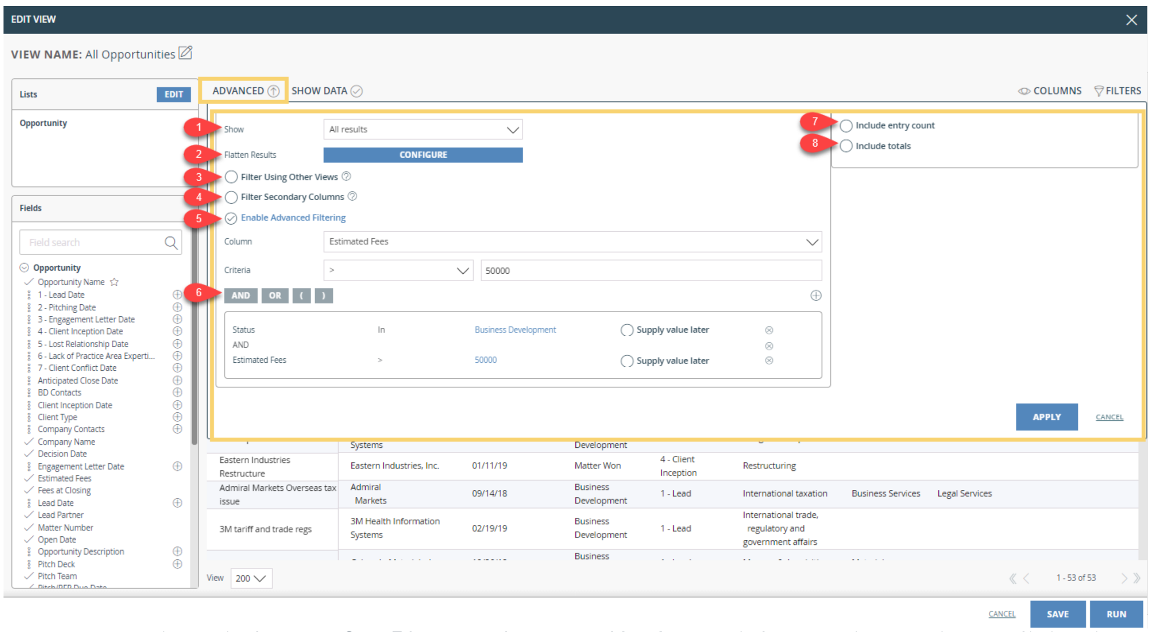
Advanced Settings & Filters

About Advanced Filters

Intapp OnePlace's View Builder includes many tools that help users filter entries and adjust their display. The View Builder can be accessed in different locations within Intapp OnePlace:

- By creating a new view or modifying a saved view from **Tools > My Views**
- When working with any **Data Grid** or **Chart Builder** while configuring **Dashboard** reports
- When using the **DCView Excel formula** available with the **Intapp OnePlace Excel Add-In**

Many of the most powerful View Builder tools can be found in the "Advanced" section of the View Builder



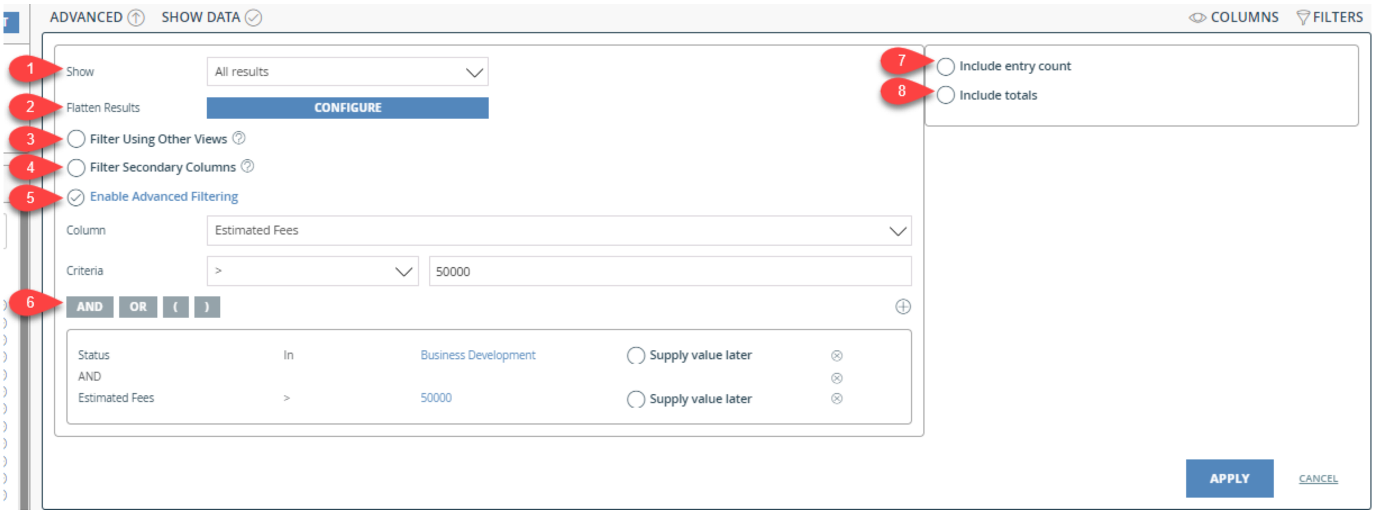
Before you create views in Intapp OnePlace, ask yourself a few quick questions prior to diving into the creation of the view:

- **Where has the data been entered that I wish to create a view for? Is this data that was entered at the Contact level, the Matter level, the Company level, etc.?**
  - This helps you determine which List(s) to select when creating views, as well as whether or not you will need to configure the view with a Primary and a Secondary List(s).
- **What fields do I need to include in my view and what entries do I want to display? All entries, only entries that meet certain filter criteria or just the first X entries based on an attribute of the data set?**
  - This helps you determine what filters you might need to apply in your View Builder, what fields you need to include in the view, and whether or not you need to modify the "Show" setting for your view or if you should leave it at the default "All results".
- **How do I want this data to display? Grouped by any common attribute with a header row for each group? Will I need a totals row and/or a count of the records in each group?**
  - This helps you determine what display options will apply. Will you need to group by any column? Should you check off to include records count for each group? Do you want to show a count, average, min, max, etc. for any column in your view?

Advanced Settings & Filters

In the **View Builder**, you will notice an **Advanced** button. Once selected, you will see 8 different Advanced Settings you can apply to your view if necessary for the view you are trying to build. These options include:

Show, Flatten Results, Filter Using Other Views, Filter Secondary Columns, Enable Advanced Filtering, And/Or Filtering, Include Entry Count, Include Totals



1. Show

This defaults to "All results" and can remain so for any views in which all results of your view and filter should present. In some cases though, you might wish to limit the number of entries that appear. The dropdown options for "Top x" let you control this. Based on the sorting that is applied to your view (i.e. Sorting Companies by Company Name alphabetically), the first "x" entries in that sort order will show (and only those "Top x".)

Examples

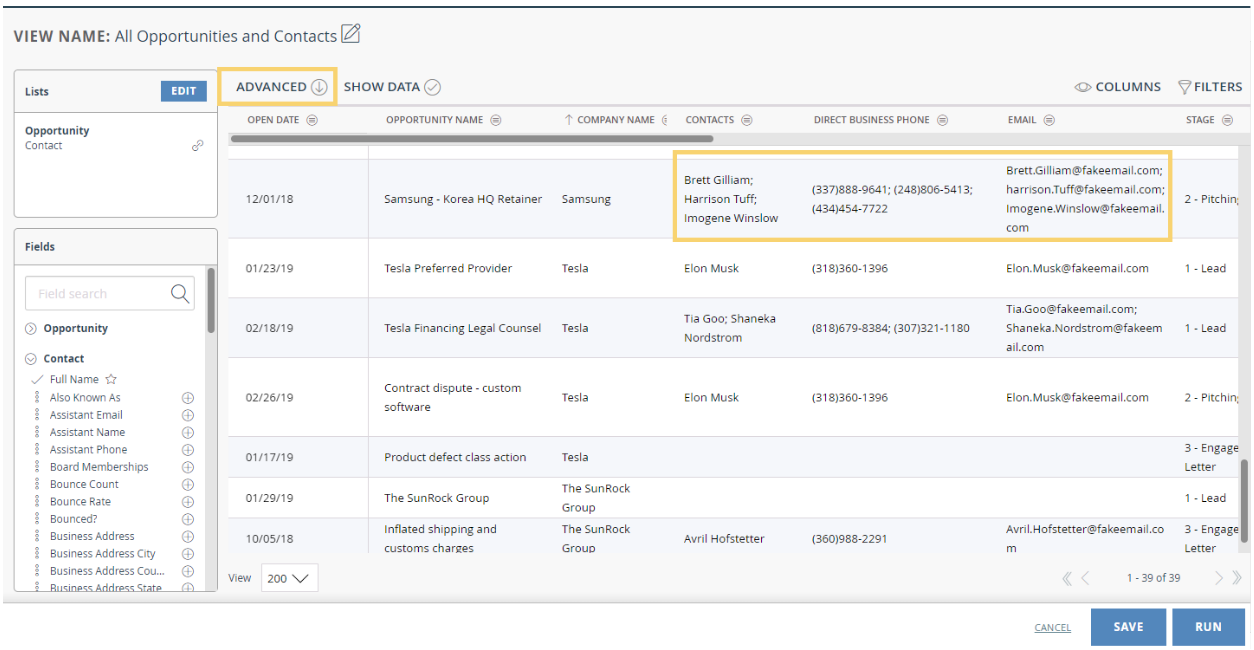
- Show the 5 clients who generated the most revenue to date (Choose Top 5 for "Show" and sort by the field that represents the total Revenue Generated by client– Descending sort order)
- Show the top 10 clients by revenue who were referred to your firm along with the referral contact year to date (Apply a filter for the date greater than January 1 of the current year. Choose Top 10 for "Show" and sort by the Revenue column– descending sort order.)

Views configured with "Top x" will dynamically refresh and update as new entries enter Intapp OnePlace or as the current entries are updated. For example, if an attorney that was ranked 11th in terms of the ranking for most hours billed this year moves up to 10th, the view will automatically update to reflect this change because of the "Top 10" Show setting.

Advanced Settings & Filters

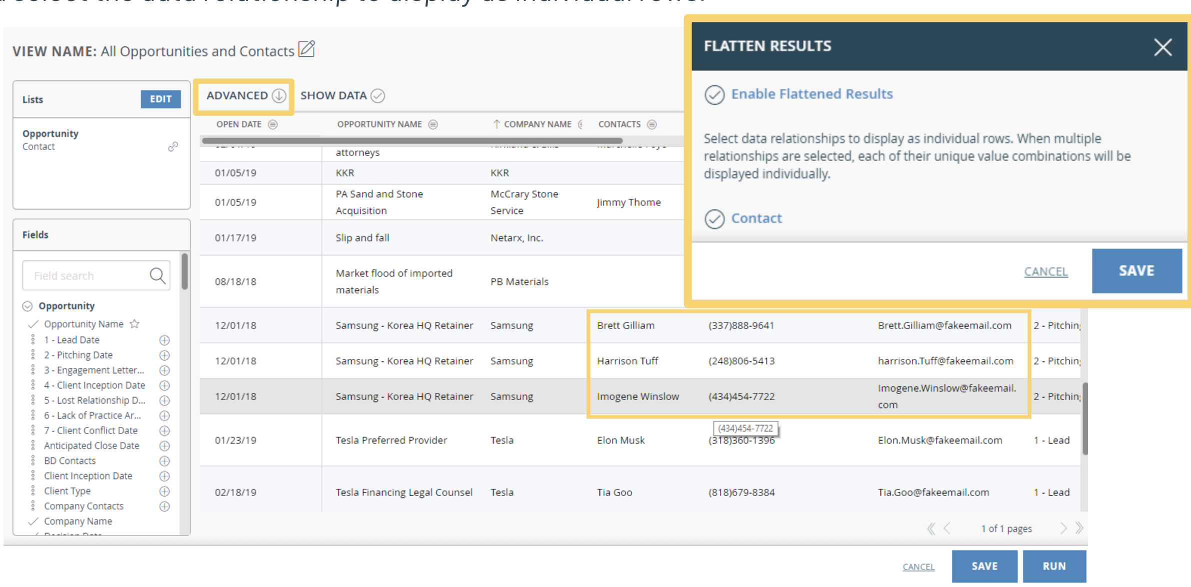
2. Flatten Results

This control allows you to show semicolon-separated values as unique rows in the View. It is common to see semicolon separated values when more than one entry is tagged to another via the same field, like multiple Contacts to an Event, or multiple Contacts to an Opportunity (as shown below):



In those cases, "flattening" the View results can make understanding individual entry relationships and their related metadata easier.

*From the Advanced Setting, click **Configure** next to **Flatten Results**, select **Enable Flattened Results** and select the data relationship to display as individual rows.*

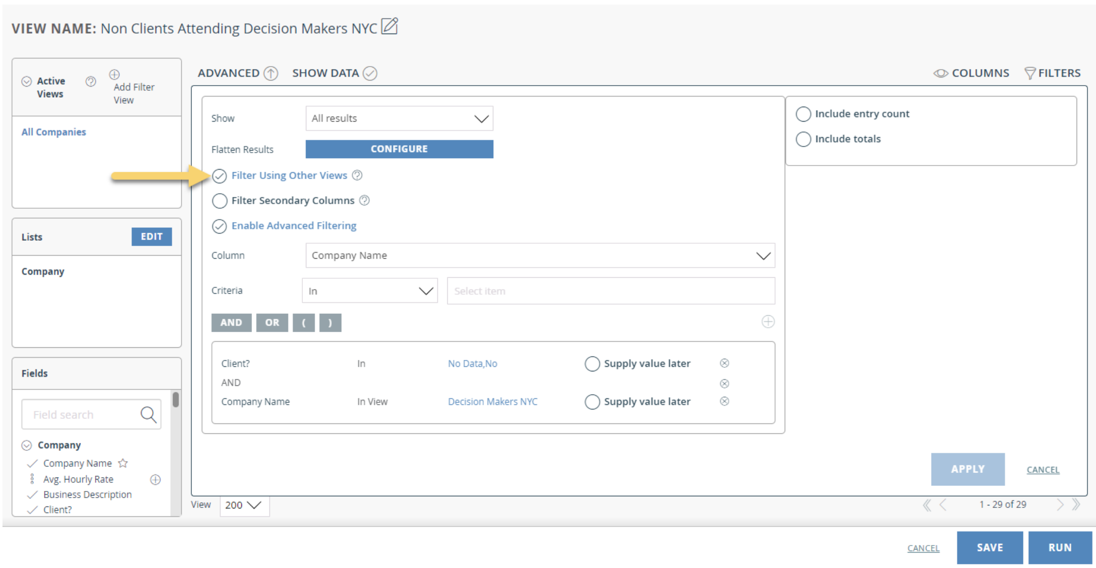


Advanced Settings & Filters

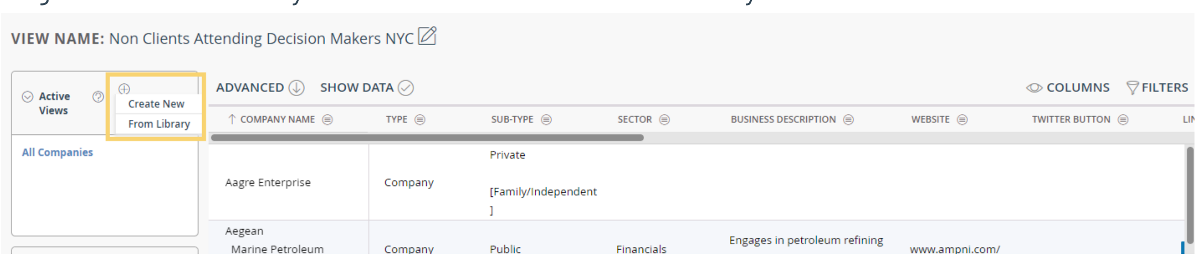
3. Filter Using Other Views

You may find it useful to apply an existing view as a filter to a new view you are creating. Filter Using Other Views allows you to do so. For example, filter a conference attendee list for attendees that do not have current matters with our firm to nurture the relationship.

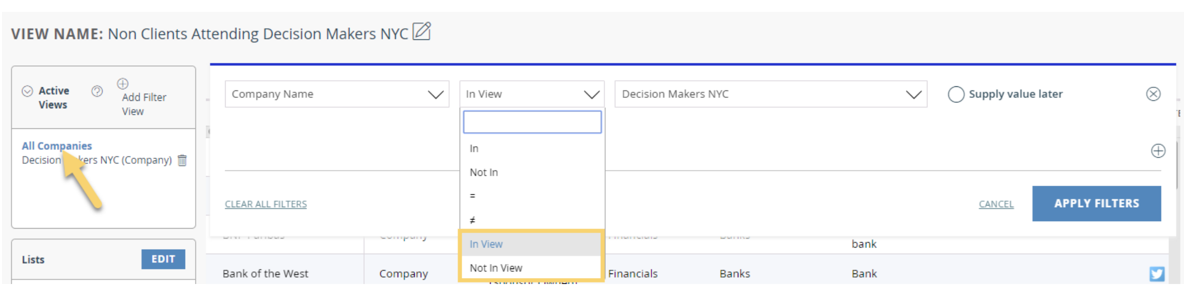
To do so, click the Advanced filter option and select "**Filter Using Other Views**" and then click **Apply**.



You now have the option to **Add Filter View** and can either click create a new view or select an existing one from the library. This view will be the second view you use to filter.



Once the secondary view is selected, click on your primary view and you will be able to apply a filter to this based on information contained in your secondary view. After clicking the primary view, click **Filters**, select the field to filter by, then indicate if the if it is **In View** or **Not in View**, and then ick **Apply**. In our example, we were filtering for contacts contained in the view of our Decision Makers NYC conference.

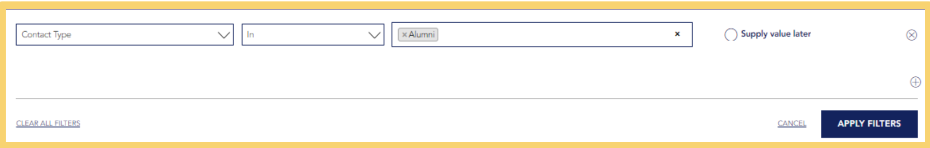


Advanced Settings & Filters

4. Filter Secondary Columns

For views that include Primary and Secondary Lists, this checkbox applies filter criteria to values in columns from secondary lists instead of just columns from primary lists.

Like "Flatten Results," "Filter Secondary Columns" is most useful when Views display semicolon-separated values from a secondary list (as is the case when looking at multiple Contacts tied to an Opportunity for instance).



View Before Filter Secondary Columns Applied

OPEN DATE	OPPORTUNITY NAME	COMPANY NAME	CONTACTS	DIRECT BUSINESS PHONE	EMAIL	STAGE
12/01/18	Samsung - Korea HQ Retainer	Samsung	Brett Gilliam; Harrison Tuff; Imogene Winslow	(337)888-9641; (248)806-5413; (434)454-7722	Brett.Gilliam@fakeemail.com; harrison.Tuff@fakeemail.com; Imogene.Winslow@fakeemail.com	2 - Pitchin
01/23/19	Tesla Preferred Provider	Tesla	Elon Musk	(318)360-1396	Elon.Musk@fakeemail.com	1 - Lead
02/18/19	Tesla Financing Legal Counsel	Tesla	Tia Goo; Shaneka Nordstrom	(818)679-8384; (307)321-1180	Tia.Goo@fakeemail.com; Shaneka.Nordstrom@fakeemail.com	1 - Lead

When "**Filter Secondary Columns**" is selected and the column with semicolon-separated values is filtered on, semicolon-separated values that do not match the filter criteria will be removed, as will any primary list entries that see all their secondary values filtered out. If "Filter Secondary Columns" is not selected in this scenario, only primary list entries that get all secondary values filtered out will be removed.

View After Filter Secondary Columns Selected and Applied

OPEN DATE	OPPORTUNITY NAME	COMPANY NAME	CONTACTS	DIRECT BUSINESS PHONE	EMAIL	STAGE
07/03/18	Journal Square Property Lease	Iron Bow Technologies LLC	Baker Mayfield		Baker.Mayfield@fakeemail.com	1 - Lead
01/15/19	3M Acquisition of SolarPlex	3M Health Information Systems	Adrianne Thorley	(571)428-8163	Adrianne.Thorley@fakeemail.com	1 - Lead
09/14/18	Admiral Markets Overseas tax issue	Admiral Markets	Mary Kraska		mary.kraska2@akeemail.com	1 - Lead
02/19/19	3M tariff and trade regs	3M Health Information Systems	Adrianne Thorley	(571)428-8163	Adrianne.Thorley@fakeemail.com	1 - Lead

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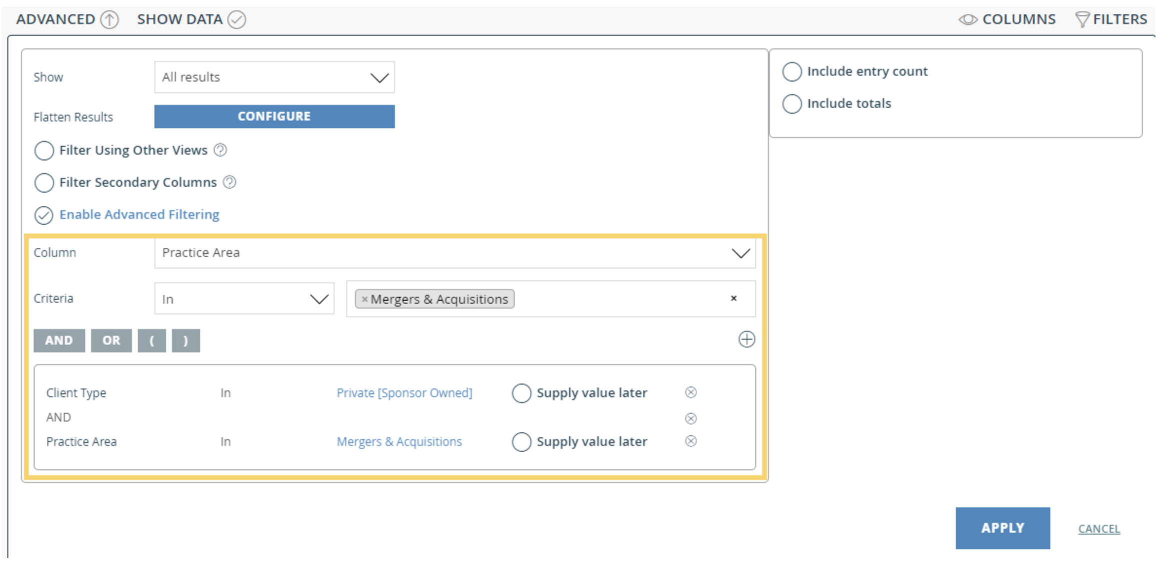
5. Enable Advanced Filtering (This checkbox enables and/or filter functionality – see below)

6. And/Or Filtering

And/Or filtering is the core of what the Advanced section has to offer. It enables combinations of filter criteria that cannot be achieved with standard filters alone. There are no limits to the number of and/or filters that can be applied, but there are a few syntax principles enforced to ensure logical results. Use and/or filters to combine filter criteria from multiple lists and arrive at unique groups of entries.



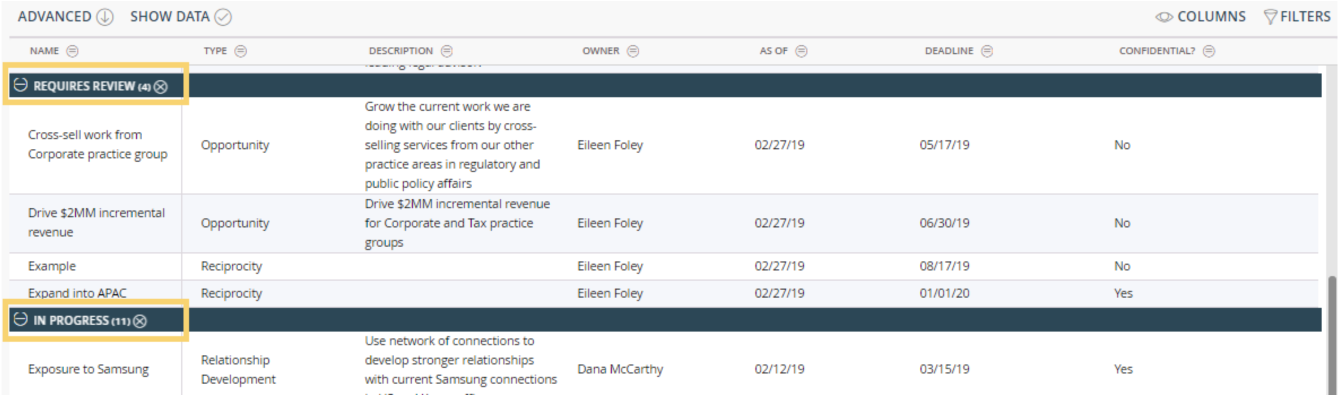
Examples

- Filter a list of Contacts for only those that are classified as attorneys AND are in the practice group Employee and Labor Relations
- Filter a list of Clients for those that are type Investor or Service Provider

Advanced Settings & Filters

7. Include Entry Count

When views are grouped by a field, “Include Records Count” will show the number of entries in each group next to the group’s name. For instance, in a Data Grid that displays all Goals, along with their current Goal Status, you can group the Goal entries by the Status column and then include a count of the number of records that are listed in each stage in parentheses after the stage description group header row.



NAME	TYPE	DESCRIPTION	OWNER	AS OF	DEADLINE	CONFIDENTIAL?
REQUIRES REVIEW (4)						
Cross-sell work from Corporate practice group	Opportunity	Grow the current work we are doing with our clients by cross-selling services from our other practice areas in regulatory and public policy affairs	Eileen Foley	02/27/19	05/17/19	No
Drive $2MM incremental revenue	Opportunity	Drive $2MM incremental revenue for Corporate and Tax practice groups	Eileen Foley	02/27/19	06/30/19	No
Example	Reciprocity		Eileen Foley	02/27/19	08/17/19	No
Expand into APAC	Reciprocity		Eileen Foley	02/27/19	01/01/20	Yes
IN PROGRESS (11)						
Exposure to Samsung	Relationship Development	Use network of connections to develop stronger relationships with current Samsung connections	Dana McCarthy	02/12/19	03/15/19	Yes

Examples

- Display the Partner Pipeline list grouped by the Lead Partner and show the count of items for each Lead Partner
- Display a list of Contacts for to invite to an upcoming seminar, group them by their Key Executive Label and show the count of Contacts in each Key Executive Label

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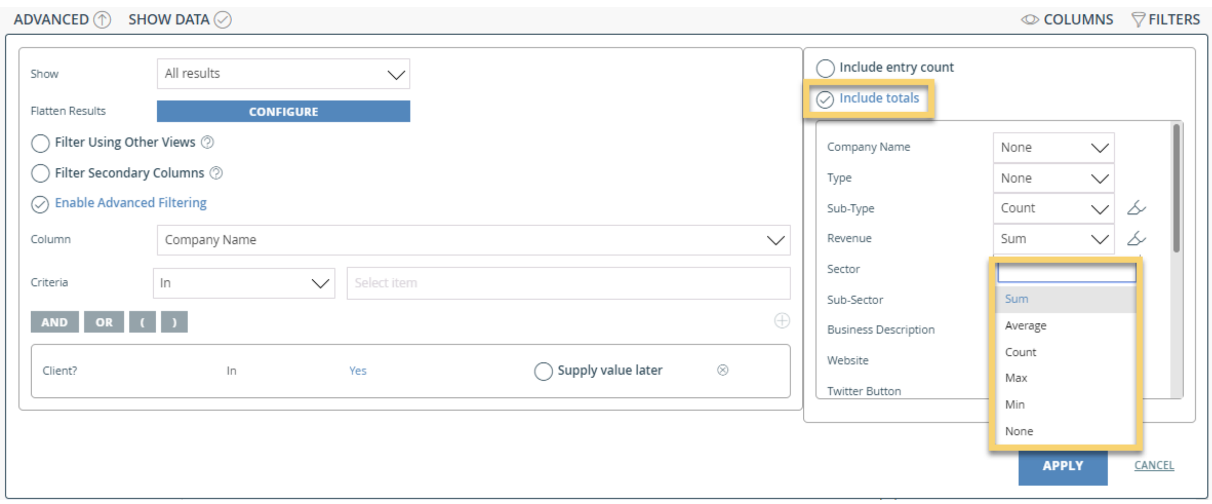
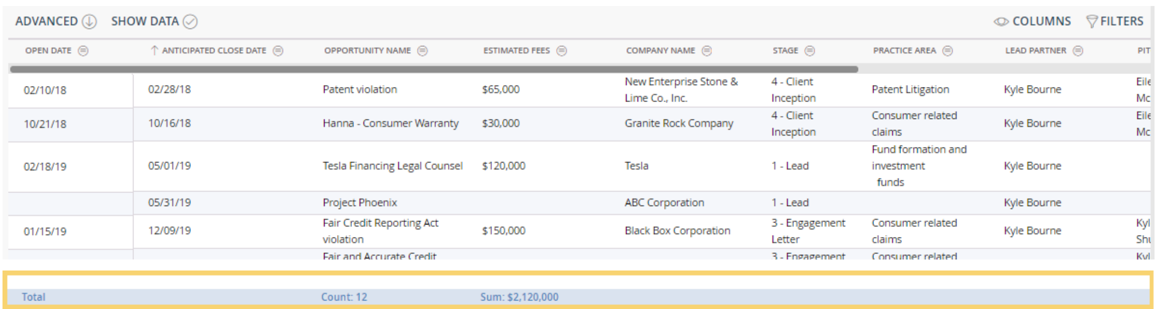
8. Include Totals

This control allows users to select columns for which they'd like to show either a count, sum, average, min, or max value at the bottom of the grid. This can be an easy way to summarize important statistics and save computational legwork.

Depending on the format for the fields included as Columns in the view, the dropdown options will present differently. For example, for a field such as Name which is formatted as Text, the only total that can display would be a "Count", but when you adjust this setting for a field that displays numeric values, the dropdown option expands to offer totals such as Average, Sum, Min, Max, etc.



When making your selections for Include Totals, be sure to click Apply in the bottom right to apply the changes to the view. You will see a blue Total row at the bottom of your grid.



Examples

- Display a list of Practice Groups and the revenue they have generated in the past year, along with the number of matters in each practice group. Average the total revenue and client counts at the bottom of the grid.
- Display a list of all clients with open matters, along with the revenue they have generated. For revenue, total up all revenue across these clients at the bottom of the grid, along with the total number of current open matters.