Key Takeaways

Quick Reference Card

Reporting Options

Web Portal Dashboard Reports

- The name, order and content that displays on Dashboard reports is configurable.
- Only users with the Administration permission can edit the configuration of dashboard reports.
  - To enter into edit mode, Admin users would click on the *Gear* icon at the top right of the portal and then click the *Edit* icon to begin making edits to existing widgets.
  - New reports can be created using the *Add* button while in edit mode.
- We offer several content options, including data grids, pivot grids, charts (pie, column and line), maps, calendars, images, newsfeed, etc.
- Dashboard reports are created at the Firm-Level (landing page) and at the Detail-Level for the various objects tracked in Intapp OnePlace (i.e. Opportunity-level pages would have their own relevant dashboard reports, as would Contacts and Companies)
- ***Highlighted Feature:*** Dashboard reports can be created for Practice Group, Client Type and Geographic locations so that you can view your data set condensed based on their tag to that object (i.e. Reports that show all opportunities in a practice group or all contacts and companies located in a geographic location.)
- Dashboard reports can be permissioned by user groups.
- End users can interact with data grids (hide columns, apply filters, sort columns, group data by different columns, resize columns) without affecting the firm's global views.
- End users permissioned to write data can apply edits to data presented in data grids using the *Edit* icon at the top of each data grid.

Scheduled PDF or Word Reports

- Using our Microsoft Word Add-In, template reports of type "List" can be created and then scheduled to be sent out on a specified frequency to designated recipients.
- The scheduling of these reports is *optional*, they can be generated automatically by the schedule you define or on-demand only when necessary to run them.
- Once created and checked in using the Word Add-In, the properties and schedule settings are managed under Tools>Template Reports in the Web Portal.
- The emails that get generated on scheduled reports can be configured under Tools>Email Templates in the Web Portal, allowing for a custom subject and body of the email message.
- ***Example Use Cases***
  - **Weekly Opportunity Report:** A weekly pdf file is scheduled to go out to all attorneys ahead of the weekly meeting to review open opportunities and make updates as needed. Active opportunity data is displayed on the report, with different tables grouping the opportunities by their current stage, practice area, client type, etc.
  - **Daily or Weekly Task Review:** A scheduled report showing the status of all tasks.
  - **Referral Summary:** A report that shows recent referrals from companies and contacts, as well as referrals to other companies and contacts, along with the value of the opportunity, that is scheduled to be delivered every other week.

Reporting Options (continued)

Generating PDF Reports from the Web Portal and/or Word Add-In

- The Word Add-In allows for the creation of "Entry" type reports that can be generated using the *Report* icon located at the top right of Detail-Level pages or from the Tools>Template Reports section of the web portal.
- ***Example Use Cases***
  - **Company/Opportunity/Matter Tearsheets:** Different tearsheets can be created for the entries you would want the ability to generate a PDF report for when located on the Detail-level page for that entry. These are helpful for grabbing a quick download of information in PDF format to be printed or emailed to someone before a meeting or after a phone call.
  - **Contact Profile Report:** Create a one pager on a contact that outlines key information, recent activities and associated opportunities and matters. This report can then be generated in preparation for a phone call or meeting.
- These reports can be generated for one entry through the *Report* icon at the top right of detail pages in the Web Portal for that entry or while logged into the Word Add-In by clicking the *Run Report* icon and selecting that entry.
- These reports can be generated for multiple entries at a time using the Tools>Template Reports page in the Web Portal (i.e. Practice Area Opportunity Pipeline for three practice groups and combine into one PDF to be emailed to the partners.)

Excel Reports

- Using the Intapp OnePlace Microsoft Excel Add-In, data stored in Intapp OnePlace can be linked to spreadsheets for analysis and reporting best suited to be conducted natively in Excel.
- ***Example Use Cases* (Quarterly Pipeline, Plan/Goal Tearsheet, Referral Source Analysis)**
- The **DCPull** formula is used to populate a single data point based on your specified criteria. (i.e. The opportunity description for a specified opportunity can be pulled into a cell from a DCPull formula).
- The **DCView** formula is used to view a table of data based on your specified formula criteria (i.e. A table showing all active opportunities along with their current stage, anticipated close date and lead partner).
- Excel spreadsheets with DCPull or DCView formulas are saved locally to a user's machine or stored on your firm's shared drive or document sharing platform.
  - Most of these reports require a one-time initial linking through Intapp OnePlace Excel formulas and then are simply refreshed when they need to be generated again.
  - They are frequently created by and owned by power users or platform managers and shared in PDF format or as an Excel spreadsheet when needed through email channels.
  - Any reports that requires custom formatting or advanced charting capabilities would be generated using the Excel Add-In. Our formulas can be wrapped in other Excel formulas so more in-depth analysis and formatting can be applied.

Notifications, Tasks and Workflow Management

Using Intapp OnePlace Notifications

- Intapp OnePlace offers the ability to create custom notifications for things like updates to open opportunities, the addition of a new goal, assignment of a task, completion of a plan, etc.
- Once set, these notifications, are sent via email and also appear on the notification bell icon at the top right of the Web Portal for the user they pertain to.
- The frequency for when notifications should be sent is set at the time the notification is created (options include Instant, Daily or Weekly.)
- When creating notifications, users can create them for just their user ID or for their colleagues as well.
- Notifications can be created using the Notification icon at the top right of certain data grids or through the Tools>Notifications section of the Web Portal.

Tasks

- Tasks can be generated either automatically through a pre-defined workflow or ad-hoc through the *Add* icon at the top right of the Web Portal or via the mobile application.
- **My Dashboard** reports at the firm-level pages help organize tasks assigned to individual users so they can clearly see the status of tasks assigned to them and update their tasks as well.

Lists and List Management

Lists Menu in the Web Portal

- The Lists menu available in the Web Portal displays all entries to the various lists that are set up in your firm's instance of Intapp OnePlace (i.e. a list of all contacts, a list of all opportunities, list of all matters, , list of all goals, list of all plans, list of all campaigns, etc.)
- These lists can be filtered using the Filter icon at the top right of the grids.
- All fields associated with the entries appear on the Lists tables.
- **Bulk Entry/Edit**
  - When looking to edit multiple entries, the Lists section of the Web Portal offers the ability to do so using the *Edit* icon at the top of the data grid. Selecting Bulk Edit Entries, an Excel-like data sheet window loads and edits can be made directly in the data sheet and saved. New entries can be typed in or pasted into the blank rows at the bottom of the data sheet window.
  - The *Import File* function, located under the *Edit* icon in data grids, can be used to import Excel tables of new entries (i.e. An Excel table with a list of new contacts to be added) so that entries for multiple objects can be made in bulk. Once selected, you will be prompted to map the Excel table headers into the Intapp OnePlace entry fields.

List Management (for Admin Users only)

- All Lists objects are initially created under List Management. Examples of Lists include Opportunities, Campaigns, Practice Areas, Plans, Goals, Contacts, Companies, Notes, and Tasks.
- The fields that are associated with the entry of a List object are created and managed under Tools>List Management. This allows for new fields to be created and for edits to be made to existing fields. Examples of fields include Opportunity Name, Client Type, Contact Email Address, Plan Owner, Matter Description, etc.
- Entry forms (the windows that pop open when a user selects the Add icon for that list) are configured based on the fields that pertain to that entry and are organized according to tabs that you define in the Entry form setup.
- Fields can be marked as required, requiring users to enter values for these fields when adding a new entry. There are various types of entry fields including Text, Number, Date, Choice Fields, Reference Fields , Images and Calculated Fields.

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Key Takeaways
Quick Reference Card

Outlook Add-In & Mobile App

Outlook Add-In

- Intapp OnePlace offers an Outlook Add-In that can be used to sync emails and events to Intapp OnePlace.
- Communications can be easily tagged to contacts, companies, service, practice area, plans, goals , opportunities and matters through the Outlook Add-In functionality.

Mobile App

- Activities can be quickly logged while on the go.
- Contact information and opportunity information can be easily accessed through the mobile app as well.

Intapp OnePlace Add-Ins

How to Download

- Close the application for which you want to download a Intapp OnePlace Add-In.
- Login to the Web portal at https://login.app.Intapp .com (https://login.app.Intapp.eu for EU clients).
- At the top right of the homepage, you will see a profile icon .
- Click the icon and choose Profile from the menu.
- The User Profile window will load with download links to each Add-In the user is permissioned to.
- Follow the prompts to open and run the setup.exe file.
- Once the setup is complete, the Add-In will appear the next time you open the application.
- The login credentials are the same as the credentials used to access the Web Portal.