



Intapp Flow

User Guide

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TABLE OF CONTENTS

Preface	5
Purpose of This Guide	5
Who Should Use This Guide	5
Disclaimer	5
Intapp Technical Support	5
Intapp Customer Portal	5
Intapp Product Feedback	5
Getting Started	6
About Intapp Flow	7
Key Terms	7
Request	7
Workflow	7
Request State	7
Request Type	7
Request Category	7
Logging In	7
Navigation	8
Dashboard	9
Dashboard Overview	10
Dashboard Widgets	10
Adding Widgets	11
Moving Widgets	12
Removing Widgets	12
Requests	13
About Requests	14
Requests Page Options	14
Grid Display	14
Filter Requests	14
Saved Filters and Columns	15
Sharing Filters	17
Request Page	19
Initiating a Request	22
Grid Type Questions	24
Managing Requests	25

Acting on a Request	25
Approve and Decline a Request	28
Delegate a Request	28
Share a Request	29
Put a Request on Hold	31
Clone a Request	32
Convert a Request	33
Cancel a Request	34
Claim and Release a Request	34
Delete a Request	34
Assign a Request	35
Assign Multiple Requests	36
Creating and Managing Sub-Requests	37
Viewing Requests and Their Sub-Requests	39
Cancel a Request with Sub-Requests	39
Handling Special Request Approvals	39
Parallel Workflow	39
Ad Hoc Workflow	39
Performing Additional Actions on a Request	40
View Request Progress	40
Add Comments	40
Attach Files	41
Attach Email Messages	42
Add Notes	43
View Activities	44
View People	44
E-mail People Within a Request	45
Generate Documents within a Request	46
Access Data Management Profiles	47
Print a Request	48
Tasks	49
About Tasks	49
Creating a Task	49
Claim or Release a Task	51
Assign a Task	51
Add Comments	52
Attach Files	52
View Activities	53

Update Task Status	54
Complete a Task	54
Tasks Page Options	54
Filter Tasks	55
Grid Display for Tasks List	55
Intapp Flow Reports	57
About Reports	58
Request Summary Report	58
Request Summary Report Parameters	59
Request Duration Report	62
Request Duration Report Parameters	64
Request Completion Time Series Report	65
Request Completion Time Series Report Parameters	67
Client Matter Details Report	68
Client/Matter Details Report Parameters	69
Client Matter List Report	72
Client/Matter List Report Parameters	73
Client Matter Attorney Report	75
Client/Matter Attorney Report Parameters	76
Editing a Report	79
Report Features	81
User Preferences	82
Search for Requests	83
Find Filters	83
Quick Find	83
Find in Files, Notes and Activities	85
User Preferences	85
Out-of-Office Request Delegation	85
Grid Customizations	87
Hide Data Entry Areas	87
Re-arrange Rows	88
Sort Columns	88
Page Navigation	89
Glossary	90
Index	91

PREFACE

Purpose of This Guide

This document enables you to use Intapp Flow for business process requests in an organization.

Who Should Use This Guide

The information contained herein is relevant to users of this application.

Disclaimer

This document is the property of Intapp, Inc., and is delivered to individuals, partners, and customers. Although all efforts have been made to keep this document up to date, all content is subject to change as new versions of the Intapp software are released. This document may not be distributed to persons, companies, or entities other than the intended recipients without the consent of Intapp, Inc.

Intapp Technical Support

For questions regarding Intapp Flow or any Intapp product, please contact Intapp Technical Support at (650) 852-0400 ext. 2 (+44 845.834.0128 in the United Kingdom), or send an email to support@intapp.com.

Intapp Customer Portal

For the latest Intapp Flow updates and updates for all Intapp products, visit our Customer Community at <https://support.intapp.com/>.

Intapp Product Feedback

Your feedback is important and helps us to improve our products. Please submit your suggestions or ideas to our Customer Community at <https://support.intapp.com/>.

GETTING STARTED

This chapter provides an overview of Intapp Flow and the application layout.

It consists of the following topics:

About Intapp Flow

Key Terms

Logging In

Navigation

About Intapp Flow

Intapp Flow was built from the ground up to address modern firm environments and their requirements for business process, legal process, and workflow automation. It's not a "blank slate" toolkit for building ugly forms using a complex, arcane back end. Instead,

Intapp Flow offers an intuitive web-based interface (both for defining processes and for end users). It also enables rapid success, with templates specifically designed for common law firm business activities.

Key Terms

This section lists specific terms that are used throughout this guide.

Request

Requests are the core element of the Intapp Flow system. A **request** is a user-initiated process of assembling information to solicit review and approval of business process requests. A request is made up of multiple questions organized into categories. Once it has proceeded through a workflow and obtained final approval or rejection, the request is complete.

Workflow

A **workflow** is a defined series of steps, with associated user roles, to accomplish necessary tasks for a business process request.

Intapp Flow uses a workflow designer to create workflows and control the request's transitions from one state to another.

Request State

A request passes through a series of **request states** in a workflow. Generally, a request state is represented by a group of people who need to acknowledge or take action on the request. As a request proceeds through its workflow, the request state changes and the application displays the updated current state.

Request Type

Request type refers to the workflow used for the request. A request type is represented by a workflow and a form.

- The **workflow** determines the request states, people involved in a request, and the path that a request should follow during transition from one state to another.
- The **form** defines the questions and request categories that appear in a particular request. A form is integrated into a workflow definition.

Request Category

Request categories are subheadings within requests, defined within the Form Designer, that classify questions and help organize information within the request. Typical request categories would include Introduction, Client, Matter, Contact Information, etc.

Logging In

Generally, Intapp Flow is installed to recognize you by your Windows domain user name. You should be able to browse to the application directory or a specific page, and if a session is not already active, you will be logged in automatically.

Alternatively, Intapp Flow may be configured to use an interactive form-based login. In this case, you must log in with a valid user name and password.

To log in to the application:

1. Enter the application URL on your browser.

The login page has a title "Please Log In" at the top. Below it is a form with two input fields: "User Name:" and "Password:". A green "log in" button is positioned below the password field. At the bottom right of the page, there is a copyright notice: "© 2017 Intapp, Inc."

Figure 1: Login page

2. Enter your user name.
3. Enter your password.
4. Click **Login** to open the Intapp Flow Dashboard page.

Note: If you do not have an account, contact your administrator.

You will be able to view the application features based on your user role. Refer to *Intapp Flow – Administration Guide* for more details on user roles.

Navigation

When you log into the application, you can view the Intapp Flow dashboard. The figure below displays a sample dashboard:

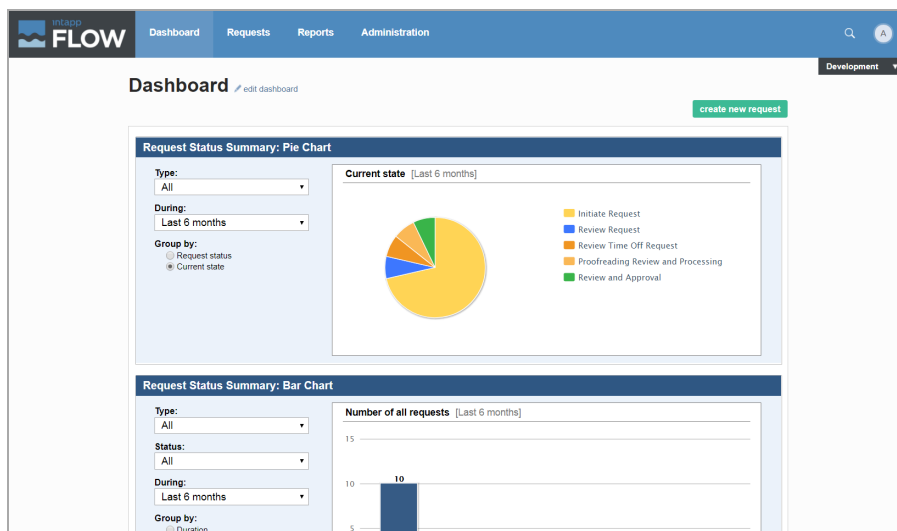


Figure 2: Intapp Flow home page

The navigation menu at the top of the application page includes the following tabs:

- **Dashboard:** Displays a list and graphical representation of request status, comments, action required, and so on.
- **Requests:** Enables you to review and perform various actions related to a request, such as submit, approve, decline, and share.
- **Tasks:** If you have the Tasks module, this tab enables you to view a list of tasks and perform various actions related to each task: creating ad hoc tasks, submitting, sharing, and so on.

DASHBOARD

This chapter describes the Intapp Flow dashboard and how you can effectively use it to view your tasks and perform specific actions.

It consists of the following topics:

Dashboard Overview

Dashboard Widgets

Adding Widgets

Moving Widgets

Removing Widgets

Dashboard Overview

The Intapp Flow dashboard displays snapshots of existing and historical data. This enables you to monitor request status and the pending request queue that requires acknowledgment or action. You can save time and perform an action that is required on a request through the dashboard page.

The figure below displays a sample dashboard with pre-populated content:

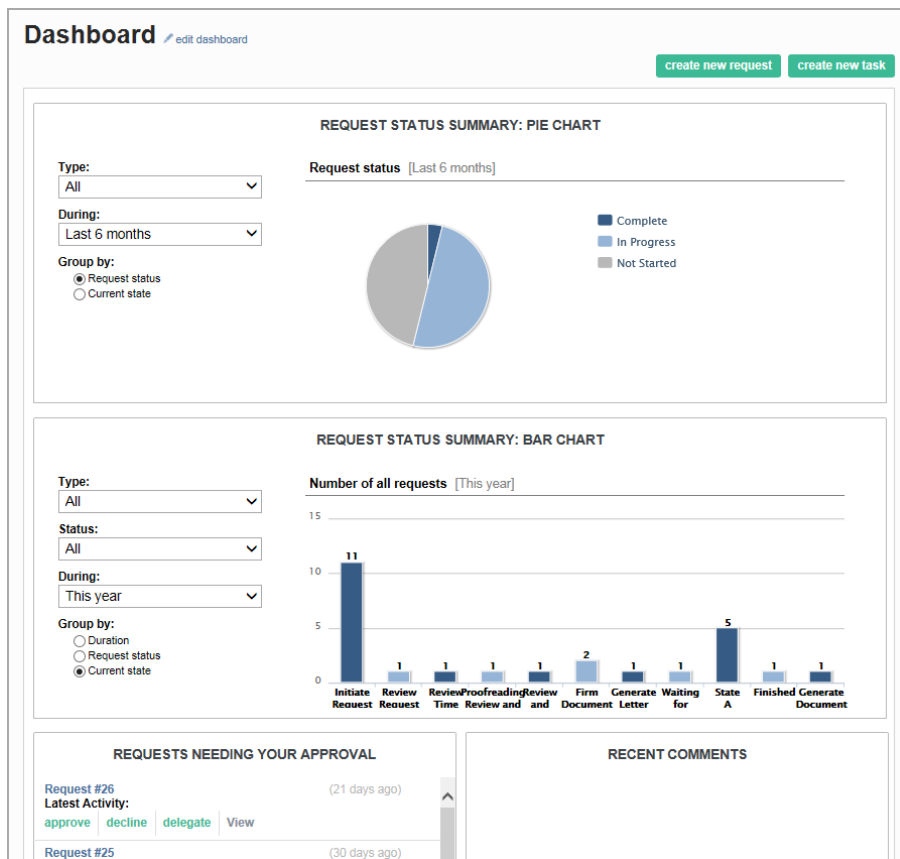


Figure 3: Intapp Flow Dashboard

You can also create a new request from the dashboard page.

Dashboard Widgets

You can select one or more of the following widgets to display on the dashboard:

- **Your requests:** Displays requests for which you are the creator, the requesting lawyer or assistant.
- **Requests needing your approval:** Displays requests that need your attention. You can approve, decline, or view requests that await your review.
- **Request Status Summary: Bar chart:** Enables you to display requests in a graphical format that you can filter by request type, progress status, and duration.

Note: If configured by the administrator, you can also view the **Group by** section in this widget. You can group the bar chart by any options that have been configured in the XML definition of the **Status Summary Bar Chart Settings** property in System Configurations: for example, Request Status, Current State, and so on. Refer to the *Administration Guide* for more details.

- **Request Status Summary: Pie Chart:** Enables you to display requests in a pie chart format that you can filter by request type and duration. (As with the Status Summary Bar Chart, you also have the option to group the pie chart by progress status of the request, by current request state, or by request type.)
- **Request Summary:** Groups requests by age. This helps users to prioritize work on requests. Requests are filtered based on the user selected in the header.

Note: If the user is a team leader, the drop-down will list all its team members. If the logged in user is not a team leader but is a member of a team, the drop-down will list that user and the team to which that user belongs.

This section categorizes the requests into the following priority groups:

- **High:** Title displays in red and contains requests that were made 21 or more days ago.
- **Medium:** Title displays in yellow and contains requests that were made 7 or more days ago.
- **Low:** Title displays in green and contains requests that were made less than 7 days ago.

Clicking on a number displays a list of active requests in that category.

- **Recent Comments:** Displays recent comments on requests that are **Your Requests**. You must be the creator, Requesting Lawyer, or assistant for the request in order to see recent comments on the dashboard.

Intapp Flow provides the following size display options:

- **Standard:** Enables you to display up to three columns of data that consumes half the page width.
- **Wide:** Enables you to display up to five columns of data that consumes the entire page width.

Your dashboard periodically refreshes and updates the contents of each widget. Your administrator will determine how frequently the dashboard is refreshed (for instance, every five or ten minutes).

Adding Widgets

To add content to the dashboard:

1. Go to the **Dashboard** menu.
2. Click **edit dashboard** to display the **Add Content to Dashboard** dialog box.

Figure 4: Add Content to Dashboard dialog

3. Select the widget(s) that you want to add and select a content size.
4. Click **add**.

Moving Widgets

To rearrange the widgets, click a section's title bar and drag it to a new location.

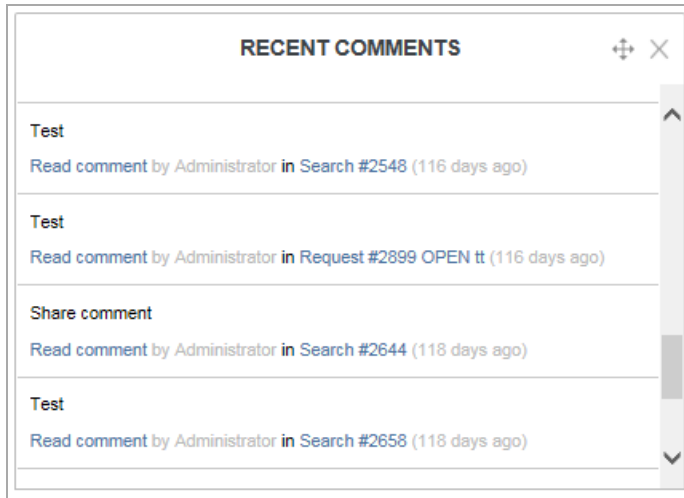


Figure 5: Move widgets

Removing Widgets

To remove a widget from the dashboard, click the X (**Close widget**) icon. The application prompts you to confirm removing the widget.

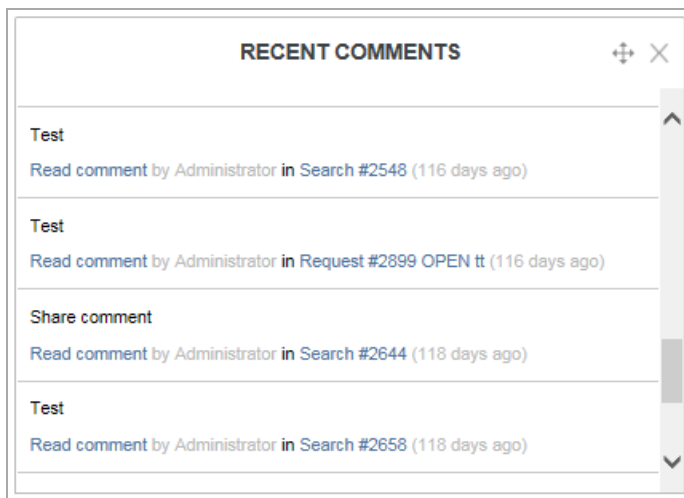


Figure 6: Remove widgets

REQUESTS

This chapter provides information on Intapp Flow requests and tasks that you can perform within a request.

It consists of the following topics:

About Requests

Requests Page Options

Initiating a Request

Managing Requests

Creating and Managing Sub-Requests

Handling Special Request Approvals

Performing Additional Actions on a Request

About Requests

Requests are created to initiate a new business intake process. A **request type** determines the **workflow** that a request should follow. A workflow defines the request **states** that a request will go through.

Requests Page Options

To view the Requests list, log in to the application, and click the **Requests** tab. The figure below displays the **Requests** list:

ID	Name	Type	Current State	Requested By	Created
1	Request #1	Taxi Reservation	Initiate Request		7/6/2017 6:15 PM
2	Request 7/22/17	Taxi Reservation	Initiate Request		7/6/2017 6:15 PM
3	Request #3	Request to trade stock	Review Request		7/6/2017 6:15 PM
4	Request #4	Request to trade stock	Initiate Request		7/6/2017 6:15 PM

Figure 7: Requests list

Grid Display

To display specific columns in the Requests list, you can use the **choose columns to show in grid**  icon. On the **Requests** list page, click the icon to view a list of columns that you can add or remove on the grid. Currently displayed columns are indicated by dots next to the column names, as shown in the figure below.

ID	Name	Type	Current State	Requested By	Created
1	Request #1	Taxi Reservation	Initiate Request		7/6/2017 6:15 PM
2	Request 7/22/17	Taxi Reservation	Initiate Request		7/6/2017 6:15 PM
3	Request #3	Request to trade stock	Review Request		7/6/2017 6:15 PM
4	Request #4	Request to trade stock	Initiate Request		7/6/2017 6:15 PM
5	Request #5	Request to trade stock	Initiate Request		7/6/2017 6:15 PM
6	Request #6	Request to trade stock	Initiate Request		7/6/2017 6:15 PM
7	Taxi Reservation 7/22/17	Taxi Reservation	Initiate Request		7/6/2017 6:15 PM
8	Request #8	Supply / Equipment Request	Initiate Request		7/6/2017 6:15 PM
9	Request #9	Request Paid Time Off (PTO-Human Resources)	Review Time Off Request		7/6/2017 6:15 PM
10	Request #10	Request Bereavement Leave (Human Resources)	Initiate Request		7/6/2017 6:15 PM

Figure 8: Grid display options

Note: Firms can add custom request properties to display on the **choose columns to show in grid**  icon list. Please contact Intapp to add custom properties.

For information about saving your column settings, see *Saved Filters and Columns*.

Filter Requests

You can filter your requests list using the following options, which appear as links above the table of results:

- **Active:** A request that is not yet completed. Its status could be **in progress**, **not started**, or **needs attention**.
- **Completed:** A request that has gone through a workflow and reached the final state, **finished**.
- **Your requests:** Requests in which you are the creator, requesting lawyer, or assistant.
- **Unassigned:** Requests that are unassigned or unclaimed.
- **Assigned to you:** Requests that are assigned to you currently.

- **More:** Enables you to apply advanced filters to get specific results.

For example, to display requests that have an **In Progress** status (and are Assigned to you), you can select the **Status** system field from the **More** drop-down menu and add it as a filter. You can add multiple advanced filters as needed.

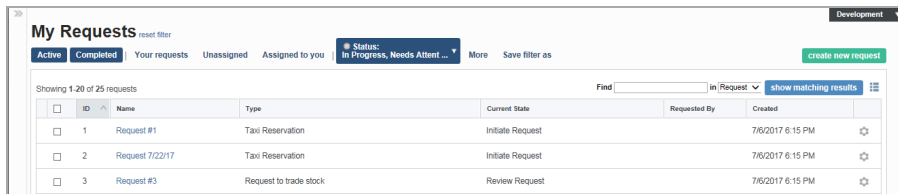


Figure 9: Advanced request filters

Intapp Flow remembers your filter settings and when you log back in, the request list is displayed using your previous settings.

Saved Filters and Columns

You can save filters you use often. You have the option of saving your column selection for the list of requests as well. Follow these instructions to save a filter:

1. Click the **save filter** button at the top of the Requests list.

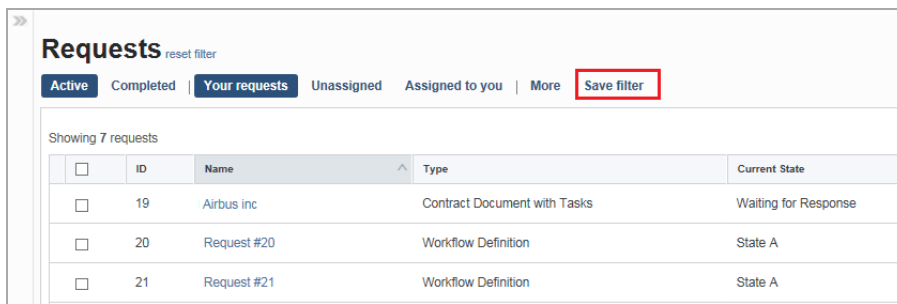
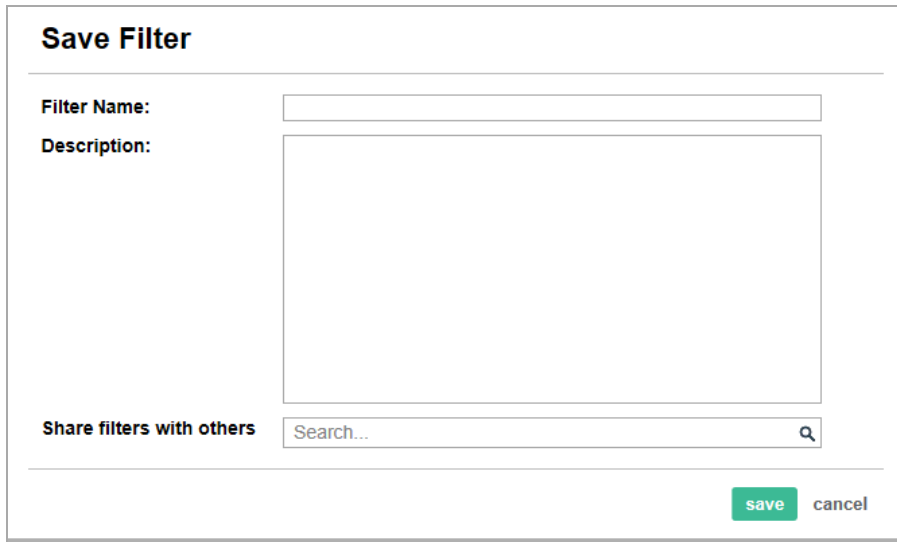


Figure 10: Save filters

2. Give the current filter a name (required) and optional brief description. You can edit the name and description after saving the filter.
3. If you wish, you can also share the filter with other users by typing their names into the **Share filters with others** lookup field.
4. The **Save column selection** box is checked by default. If you don't want to save the columns you have currently selected, uncheck the box.



Save Filter

Filter Name:

Description:

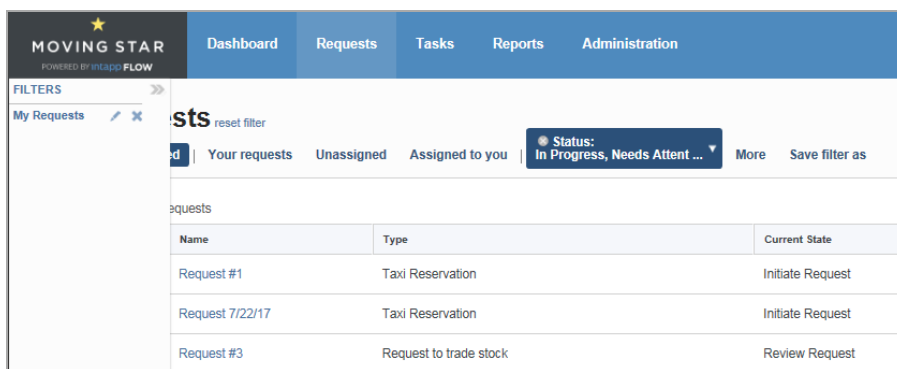
Share filters with others

save **cancel**

Figure 11: Save filter dialog box

- Click **save**.

The filter will appear in a list of saved filters, as shown below. Click the >> arrows in the upper right hand corner of the sliding **Filters** panel to show or hide the list of filters.



MOVING STAR
POWERED BY BREADCROWD FLOW

Dashboard Requests Tasks Reports Administration

FILTERS >>

My Requests reset filter

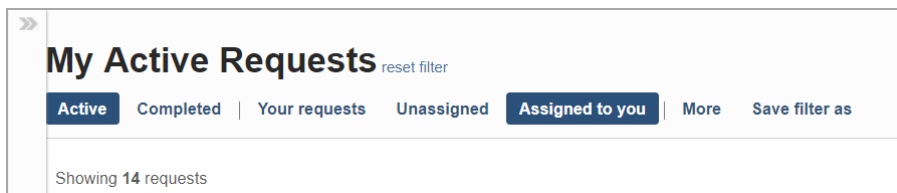
Reset filter filter

Status: In Progress, Needs Attention More Save filter as

Name	Type	Current State
Request #1	Taxi Reservation	Initiate Request
Request 7/22/17	Taxi Reservation	Initiate Request
Request #3	Request to trade stock	Review Request

Figure 12: List of saved request filters can be shown or hidden

You can edit or delete any of the saved filters on this list. When a saved filter is applied, the Requests list page title will display the filter name, along with a **reset filter** link beside it.



>>

My Active Requests reset filter

Active Completed Your requests Unassigned Assigned to you More Save filter as

Showing 14 requests

Figure 13: Filter name displayed above list

If you make changes to a saved filter, you may click the **save filter as** link and save the altered filter under a new name. The previous filter will remain saved to the filters list under its original name.

Sharing Filters

Users can share filters they use often with other users and groups. When you save a new filter or edit an existing filter, you can also share it with users and groups you select in the dialog.



The 'Save Filter' dialog box is a rectangular window with a light gray border. At the top left, the title 'Save Filter' is displayed in bold black text. Below the title, there are two main sections. The first section, labeled 'Filter Name:' in bold, contains a text input field with the value 'Requests to Assign'. The second section, labeled 'Description:' in bold, contains a larger text area with the text 'All active requests not currently assigned to a user.' Below these sections, there is a section labeled 'Share filters with others' in bold. This section contains a search bar with a magnifying glass icon on the right. Inside the search bar, two user names are listed: 'Ingrid Intake' and 'Pascal Partner', each followed by a small blue 'x' icon. At the bottom right of the dialog, there are two buttons: a green 'save' button and a gray 'cancel' button.

Figure 14: Adding recipients for a shared filter

Filters shared with you by others will appear on the filters panel as **Shared with you**.

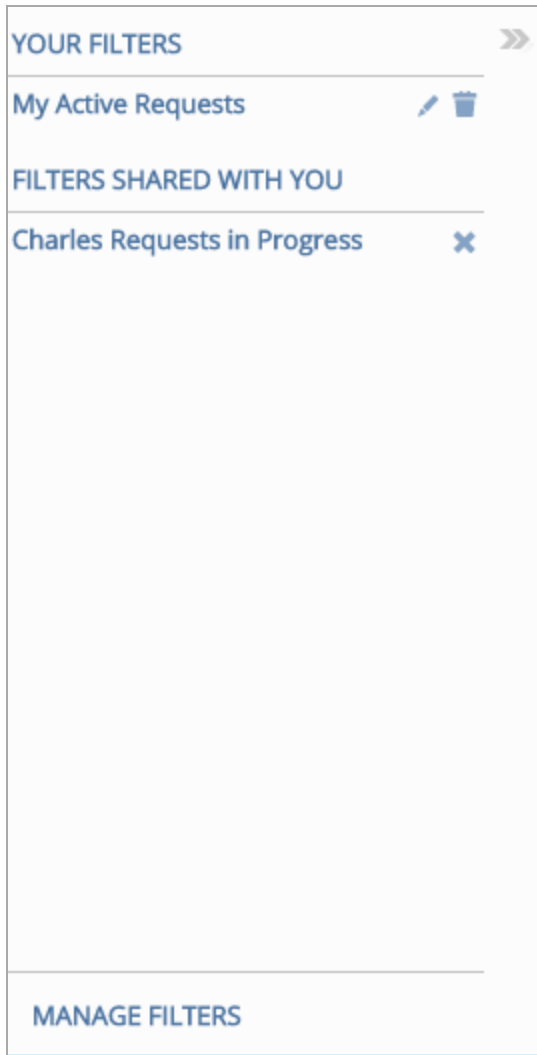


Figure 15: Filters panel with shared filters

Although you can't edit a filter that has been shared with you by another user, you can save a modified version of the filter to your own filters group. If the creator of a filter shared with you modifies the filter, however, you will see the changes when you open it.

You can unsubscribe from shared filters in two ways: either click the **x** beside the filter name in the filters panel, or click the **Manage Filters** link at the bottom of the filters panel and uncheck the box beside any filters you wish to remove from your list.

Manage Filters

Filter Name	Owner	Show in Shared Filter List
Charles Requests in Progress	Administrator	☒

proceed

cancel

Figure 16: Managing Filters.

Request Page

To view details of a request, click a request on the **Requests** list.

The **Request** page is shown in the figure below. The table that follows gives a detailed summary of its available features.

Request #8 edit

Next Step: Review and Submit

IN PROGRESS

Request Files Notes Activities People

▼ Overview

Req ID: 8

Created By: Administrator

Created On: 07/06/2017 18:18:00

Current State: Initiate Request

Request Type: Supply / Equipment Request

Request

IN PROGRESS

▼ General Info

IN PROGRESS

Requestor Name:

Search...

Supervisor Name:

Search...

Select Client #:

Search...

Select Matter #:

Search...

Submit

delegate

share

People

Created By

Administrator

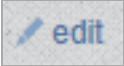
A

Administrator

Figure 17: New request page

The table below provides **Request** page fields and their descriptions:

Field	Description
Request Tab	
Edit icon	Enables you to edit the request

Field	Description
	name.
Attach a file 	Displays a dialog box to attach files and notify users on it.
Comments 	Navigates to the Comments section to provide comments within a request.
Print menu 	Provides the following options: • Print this request: Displays print options to be included with the answers when you print the request. • Print a blank request form: Opens a blank request form without answers. You can print this form through your browser. • Print request activities: Displays information on Activities tab for you to print.
Gear menu 	Displays a list of actions that you can perform on the request, such as share, clone, move, and so on. The options available to you are based on the workflow.
Request category 	Expandable and collapsible request categories. These categories are defined in the Intapp Flow form designer.
People Working on This Request	Displays the reviewers associated to the request. This panel can be hidden or docked as per user preference.
Files Tab	
Click here to add a file	Like the Attach a file button, displays a dialog box to attach files and notify selected users.
Sort by	Enables you to sort by date, name, and creator if files are attached to a

Field	Description
	specific request.
Open file	Enables you to open a file through this page.
Creator 	Enables you to view the user who attached the file.
Notes Tab	
Click here to add a note	Enables you to add a note to the request and mark it confidential.
Edit Remove	Enables you to modify or remove the note. You can also clear the confidential mark when editing.
Activities Tab	
Sort by	Enables you to sort the request states by date or name.
Expand a request state	Enables you to view the users related to each request state, action performed by each user, and at what date and time.
People Tab	
Add People	Enables you to share the request with other users. Click the ADD PEOPLE button  to display the Share this Request dialog.
Created by	Displays the user who created the request. Click  to view user details.
Requesting user	Displays the user who initiates the request. Click  to view the user activity and permissions.
Reviewers	Displays list of reviewers set in the workflow. Click  to view reviewer activity and permissions. Green dot next to a reviewer indicates that the reviewer has approved the request.

Initiating a Request

You can initiate different request types.

Follow the steps below to create a request:

1. Click the **Requests** tab. (You can also create a request through the dashboard.)
2. Click **create new request**.

The **create new request** dialog box appears.

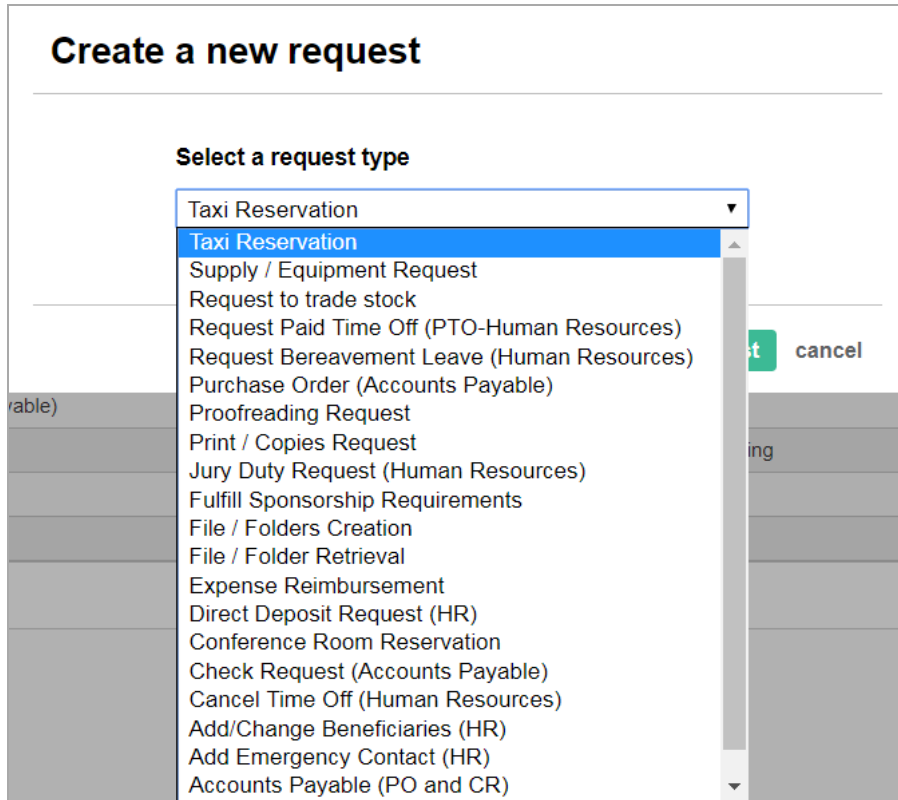


Figure 18: Create new request dialog

3. Click the drop-down menu. **Select a request type**: To create a request based on an appropriate workflow.

If a request type has a grouping name, it will be displayed under the corresponding **Group Name** in the **Request Type** drop-down list.

Workflow types that are not assigned to any of the group names listed above will be shown at the top of the drop-down list. Refer to the *Intapp Flow - Administration Guide* for more details.

Note: Depending on how the **Create a new request** dialog is configured, the options may differ for different users. Users have the option to define filters for looking up and identifying existing clients and/or matters in the Create Request lightbox. (See the following example) Usually the Administrator will set this dialog for the users.

Create a new request

Find a client | Find a matter

Client...

Matter...

Practice Area

Litigation x

Clear Apply

create request cancel

4. Click **create request** to generate a new request.
5. Provide a descriptive name for the request.
6. Fill in information for all required fields of the request. As soon as you fill in the required fields for a request category, the status of that particular category changes to **Complete**. If a request category does not have any required fields, you must answer all questions to change its status to **Complete**.

General COMPLETE

Office:

New York

Requested By Lawyer: (required)

Pascal Partner

Include in firmwide New Matter Report?

☒ Include ☐ Don't Include

Is this Pro-bono?

☐ Yes ☒ No

Client NOT STARTED

approve decline share release

Figure 19: Request category

7. Perform an action on the request such as **submit**, **share**, **delegate**, or **claim**. These options appear based on the request type being used to create a particular request.

The application displays a message based on the type of action performed and the progress wheel updates the progress status.



Figure 20: Progress wheel

The request moves to another level of review as defined in the selected request type or workflow.

Grid Type Questions

Some questions are configured to allow answers to be stored in a grid display, with multiple columns and rows. After you have entered data in all the grid sub-questions, click the **add** button, and the answers will be saved in a new row.

Several grid question options can be configured by administrators within the Intapp Flow form designer. For example, if the **Enable Hierarchy** option has been selected, you can add multiple levels of hierarchies in the displayed grid. This

is useful in defining relationship hierarchies. To add a sub-row to a parent row, click the  add icon. You can expand and collapse the parent row if it has sub-rows under it. (The number of levels that you can add is also configured within the form.) Removing a parent row deletes its sub-rows as well.

To update a record, click the  edit icon and update the values in the data entry area. Click **update** to reflect the changes in the grid.

Grid Question:

▼

First Question: ? hide

Second Question: ?

add

First Question	Second Question	
Ethics Department code	4	+ / x
Finance Department code	8	+ / x
▼ Service Unit	10	+ / x
Health Department code	2	+ / x
Education Department code	5	+ / x

Figure 21: Hierarchies in a grid

To edit multiple questions simultaneously (for instance, to update the same sub-question in multiple rows), check the boxes beside each question and then click **edit**. Make changes to any sub-question(s) and save. The value you enter will be applied to all the rows you have selected.

To delete multiple rows, check the boxes beside each row and click **delete**.

Grid questions can be configured to include a Grand Total row, adding specified numbers within the grid and updating the total dynamically.

Grid

COMPLETE

Grid Totals:

▼

hide

Name:

Allocation:

Rate:

add

Name	Allocation (%)	Rate (\$)	
Leo Lawyer	20	40	 
Linda Lawyer	20	50	 
Grand Total:	40	90	

Figure 22: Grid question Grand Total row

Note: Under some conditions, a grid question can be made partially editable: in those cases you will only be permitted to edit the data in existing rows, not add or delete new rows.

Managing Requests

Once a request is submitted, it goes to the next request state as specified in the workflow. There are various actions that you can take on a request. A request can change state by being submitted, approved, declined, moved, or cancelled.

Each user associated with the request type is allowed to perform a specific set of actions in a request. Based on the request type selected and user privileges defined, the actions described in this section may be available or unavailable to a user. For example, you may have the ability to share a request but not delegate it.

Acting on a Request

You may perform actions on a request from multiple areas in the application or via email, as defined below:

- On the **Dashboard**: In the **Requests Needing Your Approval** section, click one of the actions.

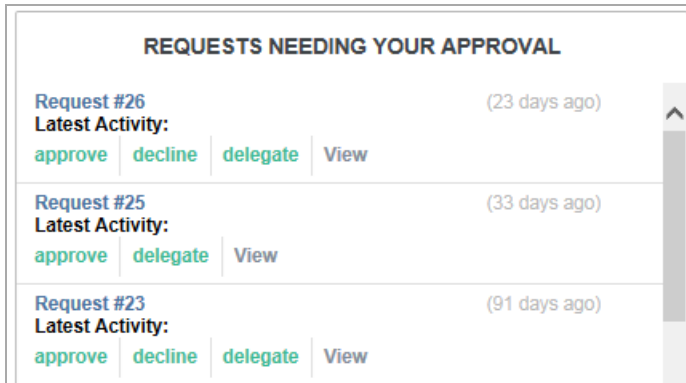


Figure 23: Dashboard request approval option

- On the **Requests list**: Click the **Gear** menu  to display a list of actions that you can perform on a particular request.

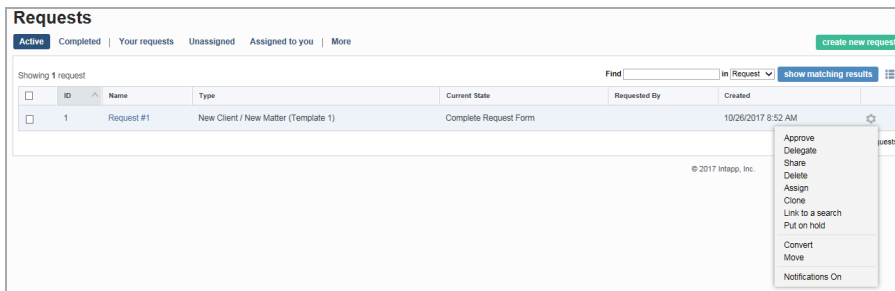


Figure 24: Request page - gear options

- On the **Request Details** page:

- The **Gear** menu  displays a list of actions that you can perform on a particular request.
- At the bottom of the **Request Page**: A sticky footer shows all available actions based on your user role.

General Info

NOT STARTED

Requestor Name:

Search...

Supervisor Name:

Search...

First Day of Time Request:

Last Day of Time Request:

How do you want to request this time?

☐ Total Amount: Request the total amount for Request Date Range

☐ Specific Days: Request time for specific days during Request Date Range

Available PTO Balance:

Parameter Name	Value
Available Balance:	26.31 hours (as of 08/12/14)
Policy Name/Type	US Intapp PTO / Time Used
Request Time Period	08/12/14 - 08/25/14
Time tracked as:	8 hours per day

approve

Special Circumstance

Recommend to Reject

more

Figure 25: Action options on request page footer

- From an **Email notification** you receive (approve/decline only). **Approve** and **Decline** buttons will appear in the body text of the email message. If you are an Intapp Flow user authorized to act on the request, clicking the buttons will allow you to approve or deny it as needed. If approval via email reply has been set up, you can add a comment in the body of the reply message, which will then be added to the request as a comment. Otherwise, simply clicking the buttons will take you to the application, where you will be prompted to confirm the action. You will be notified by e-mail only if the action fails.

Once you click an action button, the application prompts you to confirm your action. You can **proceed** or **cancel**. These action button labels can be customized by the Administrator or the user designing the workflow. You may also include a comment when approving or declining a request. These comments will be included in the list of comments for the request.

APPROVE

Are you sure you want to do the following - approve?

Comment

0 of 500 characters

proceed **cancel**

Figure 26: Comment field for request approval

By default, users are returned to the request list after initiating an action on a request. If processing the request takes more than a few seconds, you can choose to exit directly to the request list rather than waiting for the action to complete. Users who have been assigned the **Stay on Request Page** capability can continue to work on a request while transitions occur. Consult your administrator if you need this capability.

Approve and Decline a Request

Once a request is created, it moves into the next request state based on the action that you perform. Departments or individuals associated with a request state can approve or deny the request based on their user role and the request workflow.

After approving or denying the request, you may view the subsequent request state in the **Current State** column on the **Requests** page.

Type	Current State	Requested By	Created
Contract Document with Tasks	Firm Document Review		7/17/2017 12:50 AM
Contract Document with Tasks	Firm Document Review		7/17/2017 1:03 AM
Doc Assembly Test	Generate Document		9/23/2017 1:01 PM
Contract Document with Tasks	Generate Letter		7/17/2017 1:32 AM

Figure 27: Request state

The highlighted current state in the figure above indicates that the request needs a **Document Review**. The user(s) that belong to the receiving department will need to log in to Intapp Flow and take appropriate action on this request, one of the actions being approval.

To approve or decline a request, refer to *Acting on a Request*.

Delegate a Request

You may want to delegate your request to another user if for some reason you are unable to work on your request. Delegating a request to another user or users will, however, transfer your permissions to them. Once you delegate a request and lose your permissions, you can view the request in a read-only view.

You can also associate the delegation with a specific category of the request, if you wish to direct the reviewer's attention to that category.

Follow the steps below to delegate a request:

1. In a request, click the **delegate** button to assign the request to other users.

The **Delegate this Request** dialog box is displayed:

Delegate this Request

Choose people to delegate and receive this request:

☒ Everyone working on this request

☐ Administrator

Find a person:

Amy Analyst x

Associate this with a category:

No category

Add a comment:

0 of 500 characters

delegate **cancel**

Figure 28: Delegate request

2. You can perform the following on this dialog box:
 - Select the users to whom you want to delegate the request.
 - Search for a user in the **Find a Person** text box.
 - Select a request category to bring to the attention of the delegated user. This enables them to review that category and take an action without reviewing the entire request.
 - Type in a note.
3. Click **delegate this request**.

The user appears in the list of reviewers.

Note: There are additional ways to delegate a request within the application. Refer to *Acting on a Request*.

Share a Request

If your administrator has enabled sharing for requests, you can share your request if you want other users to review it. You have the option to share your permissions with another user. You do not lose or transfer your permissions when you share.

You can provide one of the following access rights to the users with whom you share your request:

- **Share my permissions:** Provides all your permissions to the selected user.
- **View and edit:** Provides edit permissions.
- **View only:** Provides read-only view of the request.

Follow the steps below to share a request:

1. In a request, click the **Share** button to display the **Share the Request** dialog box (see figure below).

Share this Request

Choose people to receive this request:

☐ Everyone working on this request

☐ Administrator

Find a person:

Casey Conflicts x
Chris Conflicts x
Ellen Ethics x

Set permission:

Share my permissions

Associate this with a category:

No category

Add a comment:

0 of 500 characters

share

cancel

Figure 29: Share request

You can also access the above dialog from the **People** tab of a request by clicking **Add People**.

2. You can perform the following in this dialog box:
 - Select the users with whom you want to share the request.
 - Search a user in the **Find a Person** text box to add them to the list of users with whom you want to share the request.
 - Edit the permissions to grant one of the following request privileges: **view only**, **view and edit**, or **share my permissions**.
 - Select a specific request category as a focus for the selected user(s).
 - Type in a note.

3. Click **share this request**.

The user appears in the list of reviewers. The reviewers listed are those individuals with approve/decline permissions. All other users sharing a request will not be listed.

Note: There are additional ways to share a request within the application. Refer to *Acting on a Request*.

Put a Request on Hold

If the progress of a request is significantly delayed, the request can be placed on hold to reflect the delay. Once a request is on hold, it can be canceled or the hold can be lifted, but no other actions may be taken. (Note that, to use this feature, the workflow for the request must be configured to allow requests to be put on hold. If it is not, the “put on hold” option will not appear in the gear menu.)

To put a request on hold, follow these steps:

1. In a request, click the Gear menu  and select **Put on hold** from the drop-down list. (You can also use the gear menu in the Requests list to select the hold option.)

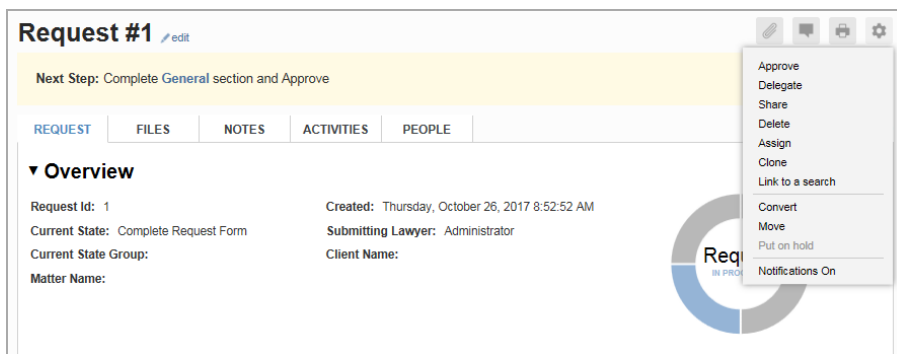


Figure 30: Putting a request on hold

2. A dialog box will appear, prompting you to confirm the hold.

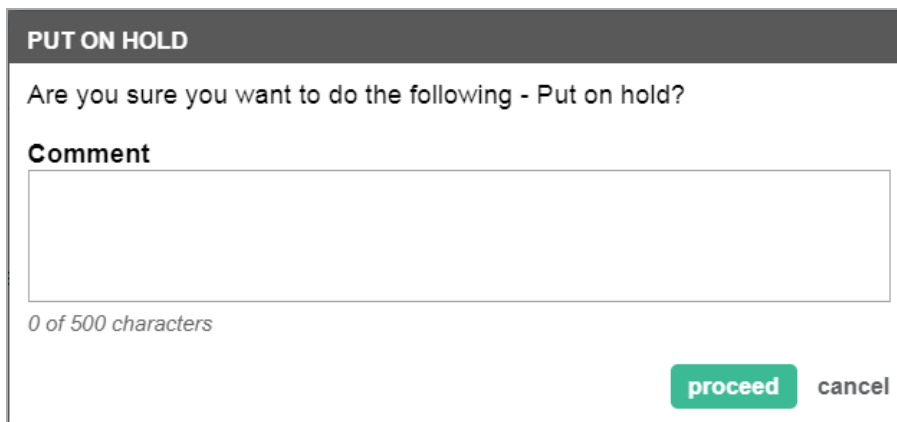
The dialog box has a dark header with the text 'PUT ON HOLD'. Below the header, it asks 'Are you sure you want to do the following - Put on hold?'. There is a section labeled 'Comment' with a text input field. Below the input field, it says '0 of 500 characters'. At the bottom right, there are two buttons: 'proceed' (green) and 'cancel'.

Figure 31: Confirm hold.

You can add a comment if desired, then click **proceed**.

3. The request will now display an orange **On Hold** message at the top of the page, as well as inside the Request Status wheel.

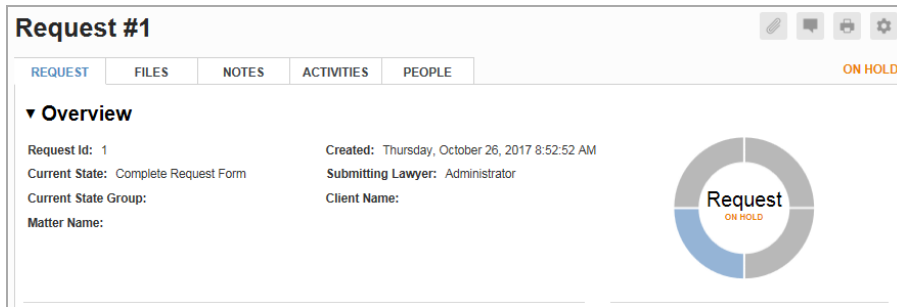


Figure 32: Request on Hold status display

- To remove a hold, open the request, click the gear menu, and select **Resume from hold**. A dialog box will appear, allowing you to add a comment before confirming the hold release.

In general, only the user who put a request on hold can remove the hold. However, other users with administrative privileges can also take a request off hold if necessary.

Requests can also fall into a hold state automatically after a set amount of time has elapsed. If your administrator has enabled the auto-hold feature in a particular workflow, any request created with that workflow will be placed in a hold state after a pre-set period of inactivity, such as one week or three days. (In this case, the user assigned during workflow creation by the administrator can take the request off hold.)

Clone a Request

Cloning a request creates a new request with the same questions and answers as an existing request. Not all users have this capability.

Intapp Flow does not clone the following objects:

- Activity history
- People working on this request
- Files
- Comments

If you want to ignore some questions when cloning a request, you can ask the administrator to change the configuration settings to enable that. Administrators can specify these questions in the **Clone Request Ignored Questions** option on the **Configuration** tab. Refer to *Intapp Flow - Administration Guide* for configuration options.

Follow the steps below to clone a request:

- On the **Requests** page, click the **Gear** menu  next to the request that you want to clone, or open a request that you want to clone and click the **Gear** menu on the **Request Details** page.

Click **Clone this Request** to display the following prompt:

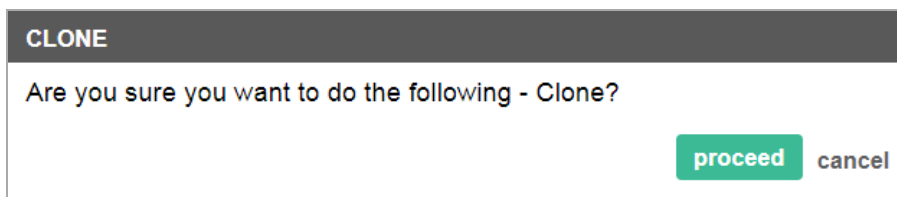


Figure 33: Clone request dialog

2. Click **proceed**.

A new request with the same questions and answers is created.

Convert a Request

You can convert an existing request from one type to another. This process changes the underlying workflow type of the request: for example, from New Client/New Matter to Existing Client/New Matter. The original request will no longer be active (but will still appear as a complete, "converted" request in the Request List), and you may continue working on the request in its new, converted form.

Administrators can change the configuration settings to allow some questions to be ignored when converting a request. They should specify these questions in the **Convert Request Ignored Questions** option on the **Configuration** tab. The ability to convert a request more than once can also be configured. Refer to *Intapp Flow - Administration Guide* for configuration options.

Follow the steps below to convert a request:

1. On the **Requests** page, click the **Gear** menu  next to the request that you want to convert, or open a request that you want to convert and click the **Gear** menu on the **Request Details** page.

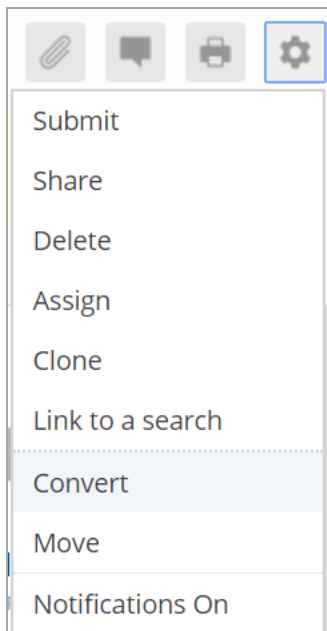


Figure 34: Convert request action menu option.

Click **Convert** to display the following prompt:

Figure 35: Convert request dialog

2. Select the new request type from the drop-down list, then add a comment if desired. (The comment will be included with both the original and the new request.) Click **proceed**.

A new request is created. The original request will appear in the request list in a Converted state, with "(Converted)" added to its name, and will be marked complete.

Cancel a Request

If you want to stop a request from being processed further, you can cancel that request. The request state changes to **Canceled**. After this point, the request status cannot be changed.

To cancel a request,

1. Use one of the methods in *Acting on a Request* to click the cancel option.

The application displays a prompt for you to confirm the cancellation.

2. Click **proceed** to cancel the request.

The request state changes to **Canceled**.

You can view the answered questions of a canceled request to review the request and determine the reason for its cancellation.

Claim and Release a Request

To lock or unlock a request, you can use the Claim and Release features described below:

- **Claim:** Depending on your request type, you may have the ability to claim a request. If you do not want any other user except you to take action on a request, you can claim that request. Once you claim a request, you become one of its reviewers and your name appears in the **People Working on a Request** list. You can claim a request using the methods described in *Acting on a Request*.
- **Release:** If you have claimed a request previously but want to unlock it for others to act upon, you can use the **Release** button. The **Claim** button becomes available again if you release a request. The request status remains unchanged.

Delete a Request

You can remove a request if it is no longer required or was created by mistake. Users with the **DeleteRequests** capability will be able to delete requests created by anyone at any state. Users with the **DeleteMyRequests** capability will

be able to delete only requests they created themselves, at any state.



To delete a request, click the **gear** menu from the request list or from within the request, and click the **Delete this request** option. Click **delete** on the prompt to confirm the deletion.

Assign a Request

The Assign Request capability enables a user to assign or re-assign a request to another user to distribute workload. The Assign Request feature behaves in the following manner in different scenarios:

- The **Assign this Request** dialog displays users that have been currently assigned the request. If the request is not assigned, the dialog displays the current assigned user as **Not Assigned**.

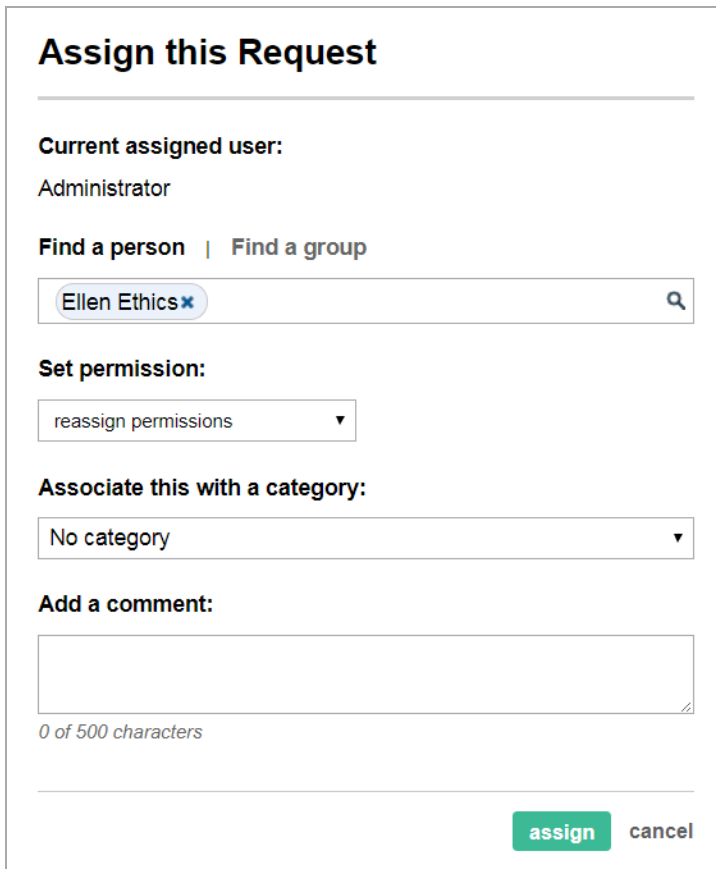


Figure 36: Assign request dialog

- If the request has been assigned to multiple users, the list of assigned users appears at the top of the dialog.

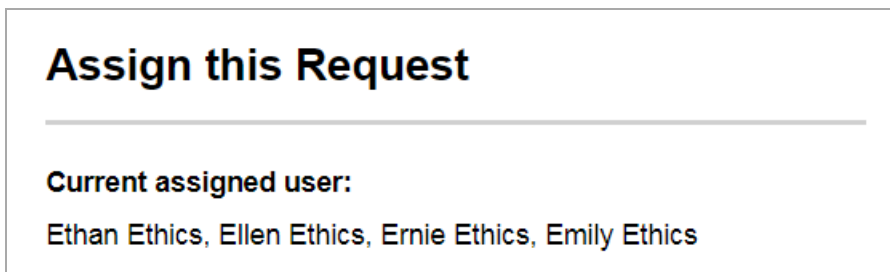


Figure 37: Request assigned to multiple users

- If the current request state is not a claimable state and the request is assigned to one or more users, the **Find a person** and **Find a group** options are displayed.
- If the request is in a claimable state and the request is unassigned, the **Assign this Request** dialog provides you the option to select **People who can claim** the request. You can toggle it to the **Find a person** option. The **Find a group** option is not available when in a claim state.
- If the request is in a claimable state and is assigned to a user, the **Assign this Request** dialog provides you the option to select **People who can claim the request**. The **Find a group** option is not available when in a claim state.
- If the request is in multiple active states and the assigning user has access to more than one of those states, the application prompts you to select a state before you can assign the request.

Assign Multiple Requests

Users with the Assign Request capability can also select and assign multiple requests to other users or groups at a time. Follow these steps to assign multiple requests:

1. From the Requests list, check the box next to each request you wish to assign. (Check the box at the top of the column to select all requests on the page.)
2. Click **assign**.

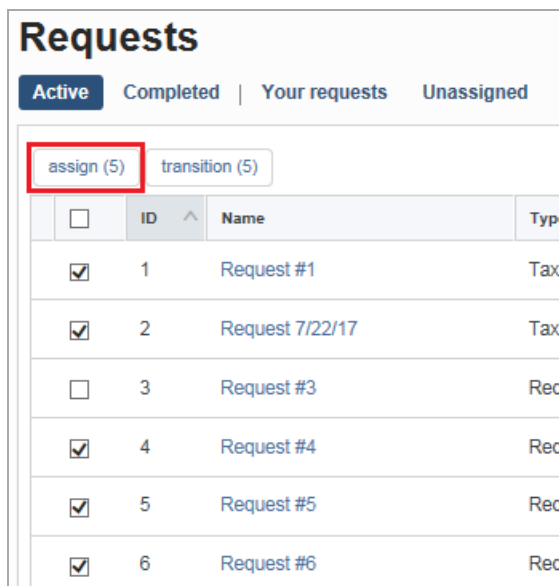


Figure 38: **Assign** button on requests list

3. When prompted, choose the users or groups to be assigned the selected requests. (Click the arrow to toggle between searching for users and searching for groups.) You may assign requests to yourself as well. When you are finished, click **next...**

Assign Requests

Select user or group to be assigned to the selected requests

Find a person | Find a group

Search...

next... cancel

Figure 39: Selecting users or groups

Note: If you try to assign a request to a user who is denied access due to client/matter security, a warning message will prompt you to choose either to go ahead with assigning the other requests, or cancel the process. Click **proceed** (this will remove the affected requests from the list) or **cancel**.

- The next step shows requests grouped by type and state. Here you can configure the permissions for each request.

Assign Requests

Please select if you wish to add permissions or reassign permissions.

Request Name	Current State	Permission
Request #18	Intake Department Review	reassign permissions / edit permissions
Request #20	State 2	reassign permissions / edit permissions
Request #22	s1	reassign permissions / edit permissions

assign cancel

Figure 40: Assigning permissions with multiple requests

You may **reassign permissions** (give all your permissions for the request to the new assignee, as when you *Delegate a Request*) or **add permissions** (keep your permissions for the request *and* grant them to the new assignee, as when you *Share a Request*). If some requests are in parallel states, you can select which state to assign.

- Once the assignment is complete, a message will inform you that the requests have been assigned successfully, and any filters applied to the request list will be refreshed.

3 requests have been assigned successfully.

Figure 41: Success banner

Creating and Managing Sub-Requests

Some workflows can generate sub-requests that share data with a parent request. Depending on the configuration of the workflow, sub-requests may need to be completed before the main request can go forward, or can be processed in parallel with the main request.

If the workflow you choose is configured to enable sub-requests to be created, it will generate a sub-request automatically at a specific point by moving into a Create Sub-request state. The type of sub-request created will depend on what is defined in the workflow for the parent request. A sub-request status window will appear below the progress wheel on the main request page:

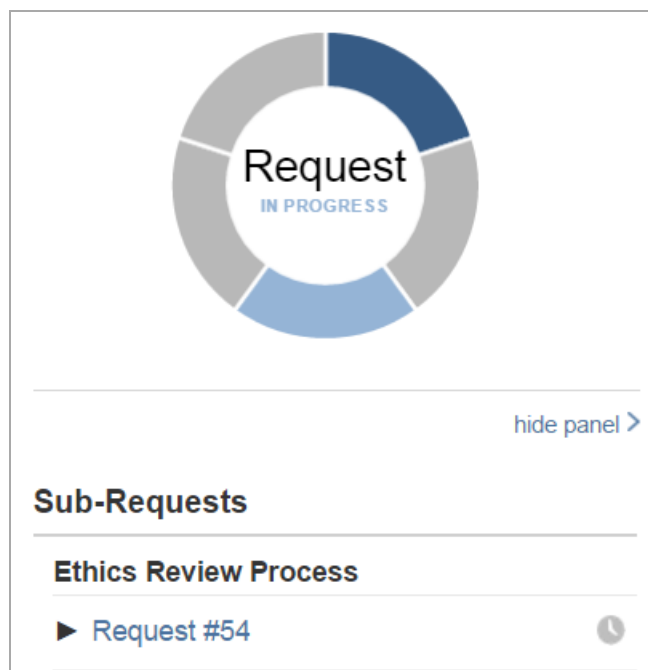


Figure 42: Sub-request Status Grid below progress wheel

Click the arrow next to the request name to see additional details, such as current state, a list of assigned users, and the date and time of the last action taken on it.



Figure 43: Sub-request status grid details

Click the name of the sub-request to open it in a new tab.

You can enter data and take actions on the sub-request as you would on any other request. The **Sub-Request Status** window will be updated automatically as the sub-request changes state. (Additional columns can be added to this status grid to show answers from sub-requests.) If configurations allow it, some data may be shared automatically from the sub-request to the main request.

Viewing Requests and Their Sub-Requests

On the request page, you may click the **Group sub-requests** check-box to display all sub-requests grouped under their parent requests. Click the arrow beside the parent request name to show or hide its associated sub-requests.

☐	2390	Request #2390	Fill Out Request	Request Conflicts Search	Larry Lawyer	5/31/2016 2:29 PM	Larry Lawyer	5/31/2016 2:29 PM	In Progress	⌵
⌵	2378	Request #2378	B	Simple Workflow	AJ	5/27/2016 11:16 AM	AJ	5/27/2016 11:20 AM	In Progress	⌵
☐	2379	Request #2379	Fill Out Request	Request Conflicts Search	AJ	5/27/2016 11:20 AM	AJ	5/27/2016 11:20 AM	In Progress	⌵ Request #2378
☐	2377	Request #2377	A	Simple Workflow	AJ	5/27/2016 11:15 AM	AJ	5/27/2016 11:15 AM	In Progress	⌵
⌵	2376	Request #2376	B	Simple Workflow	AJ	5/27/2016 11:13 AM	Administrator	6/22/2016 4:24 PM	In Progress	⌵
☐	2390	Request #2390	Fill Out Request	Request Conflicts Search	view people	6/22/2016 4:24 PM	AJ	6/22/2016 4:24 PM	In Progress	⌵ Request #2376
☒ Group Sub-Requests										

Figure 44: Sub-request grouped with parent request display

When the check-box is unchecked, sub-requests will appear like any other request. You can add the Parent Request column to your Request List display to show the names of parent requests for each sub-request.

Cancel a Request with Sub-Requests

If you try to cancel a request that has active sub-requests, you can choose whether or not to cancel any active sub-requests as well by checking the **Cancel active sub-requests** box in the cancellation window. By default, active sub-requests will be left open if the parent request is canceled.

Handling Special Request Approvals

If the request type that you selected supports them, the following workflow options are available:

Parallel Workflow

A workflow can be configured to be in multiple states simultaneously (this is known as parallel processing). For example, along with a regular approval path that includes such reviewers as an ethical committee, request department, and , a request may need an AML approval. In such a scenario, if the logged in user has permission to work in both states, the application allows the request to be opened in either state by choice.

The figure below displays the dialog box that appears if a request requires parallel reviews:

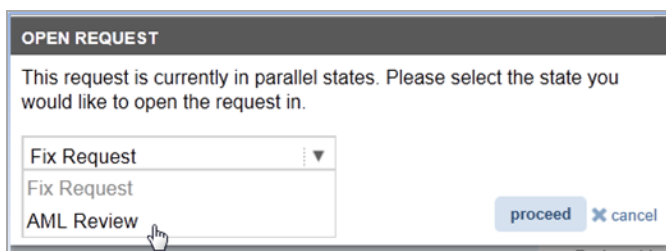


Figure 45: Parallel approval dialog

The list of reviewers that appears on the request detail page is based on the request state selected. The request page also displays a request's multiple current states while it is following the parallel workflow.

Users who share a request should be prompted with state options in order to approve one.

Ad Hoc Workflow

To assign additional reviewers to a request, you can select ad hoc reviewers. (Bear in mind that only some workflows give you this capacity.)

When you approve a request which has the capability to assign multiple reviewers, the **Assign reviewers** dialog box appears:



Assign Reviewers

Reviewers [?]

Chris Conflicts x Ernie Ethics x

☐ **Courtesy Review**

Please select the number of approvals required

2 of 2 reviewers (100%)

Add a comment:

Commentary

10 of 500 characters

proceed x cancel

Figure 46: Ad hoc reviewers

As you type a reviewer name, the application looks up and displays a list of names containing those letters.

Permissions provided to ad hoc approvers are defined in the request type. If you select the **courtesy review** option for an ad hoc reviewer, that reviewer should be able to approve or decline just once in a request state.

Enter the number of reviewers that must approve the request in the ad hoc approval process. The percentage figure will be updated based on the number you enter. Note that the application does not consider the percentage of reviewers if the **courtesy review** option is selected.

Once you approve a request that requires ad hoc approval, the request state changes to **Ad Hoc Approval**.

Performing Additional Actions on a Request

Additional actions can enable you to track and organize your requests in an efficient manner.

View Request Progress

On a request page, a progress wheel represents the request's progress through the workflow, showing all incomplete categories. You can navigate to a category by clicking it on the wheel.



Figure 47: Progress wheel in progress

The progress wheel displays the request status as **IN PROGRESS** if the request is still in process. If the request reaches a finished or canceled state, the status will change to **COMPLETE**.

Add Comments

Use the comments feature to provide additional information or leave a comment for the subsequent reviewer of the request. If you decline a request, it is useful to enter the reason in comments.

To add comments to a request:

1. Open a request.
2. Click the Comments icon to jump to the **Comments** category on the **Request Details** page.
3. You can add a general comment associated to the entire request or you can associate a comment to a particular request category. (You can also add a comment when approving or declining a request.) All comments appear under the **Comments** header at the bottom of the request page.

Figure 48: Selecting a category for a new comment

For example, if you associate your comments to the **General** category, the comment will indicate the category when it appears in the comments list and on the recent comments banner at the top of the screen.

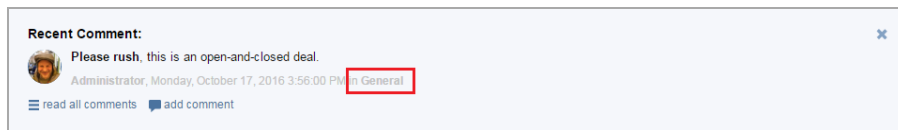


Figure 49: Recent comments banner

You can edit the text of a comment, or remove the comment, by hovering over the comment text and clicking the **edit** or **remove** links that appear below it. If you edit the comment, it will be marked (**Modified**) and the edit will appear as an activity in the Activities tab.

Attach Files

You can attach multiple files to a specific request category and notify people of the attachment.

Follow the steps below to attach files to a request:

1. Select one of the following methods to attach a file:

- On the **Request Details** page, click the **Attach a file** icon .
- On the **Requests** page, click the Files tab and click **click here to add a file**.

All of these methods will bring up the **Attach a file to this Request** dialog box:

Figure 50: File attachment dialog

2. Click **Choose a file** to select a file of any format. You can drag files over the “Drag files here” text, or click **add files** to search by name. You may also drag and drop files from a variety of document management systems, and links to those files will appear in the **Attached Files** list for other users to follow.
3. Choose to associate the file with a request category, or select “No category.”
4. Select a file type (Engagement Letter, etc.), or use the default “No type” value.
5. Select an importance level for the file (e.g. No importance level, High, Critical, etc.). Available importance levels will be set by your administrator.
6. If you want to restrict the users who can see the file, select **yes** for **Confidential**.
7. Add a comment to accompany the attachment if desired.
8. Select people that you want to notify of the attachment. You can only send notifications to people who are working on the request.

Note: The request type determines what content is to be included in a notification.

9. Click **attach** to attach the selected file(s) to a request.

These files can be accessed through the **Files** tab and through the right pane of a request page.

Attach Email Messages

To drag and drop an email message from your mailbox to Intapp Flow, you will need to use Internet Explorer 11 and install a separate Intapp Browser Plugin. You will be prompted to install the plugin when you navigate to a page with file upload capacity. Follow these instructions:

1. Click **install** at the prompt (ignore security messages). The file will be downloaded.
2. Click **yes** to allow the program to make changes to your computer, and restart your browser.
3. Once the browser has been reopened, it will prompt you to enable the Intapp Browser plugin.



Figure 51: Enabling browser plugin after installation

4. Click **Enable**.

You can now select up to 50 email messages and drag them into the browser window, in the same way that you drag and drop other types of files. They will be stored as text files, displaying To: and From: fields, a date, and a subject line. They can be sorted by date.

Note: This functionality is not available with the Windows Edge 10 browser.

Add Notes

You can add notes to a request and/or mark them confidential. The note content is not visible in the Activities tab if it is marked confidential.

Follow the steps below to add notes to a request:

1. Go to the **Notes** tab on the **Request** page and click **here** to add a note.

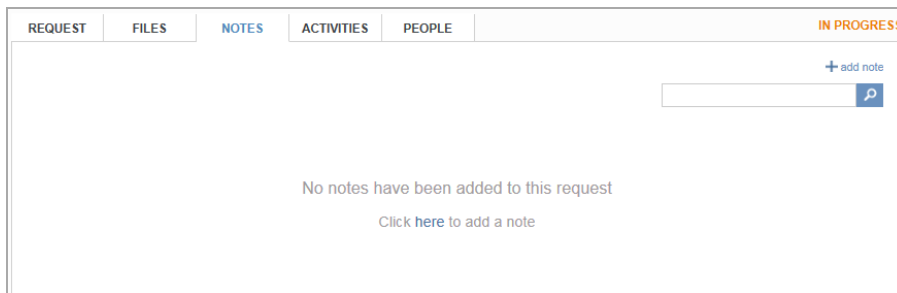


Figure 52: Add note

The **Add a Note** dialog box is displayed:



Figure 53: Add a note dialog

2. Type the note description.
3. (Optional) Select **Confidential** if you don't want the note to be visible in the Activities tab to users without the capability to view confidential notes.
4. Click **add this note**.

The note gets added.



Figure 54: Note added as confidential

The edit or remove options are available when you bring your mouse over the note text.

View Activities

On the **Activities** tab, you can view all request states and reviewers in each state. This tab displays details such as activities performed by each person, along with the date and time of each activity. You can also sort activities by date and name. You can view people's pictures on the **Activities** tab if the administrator added one to the user profile.

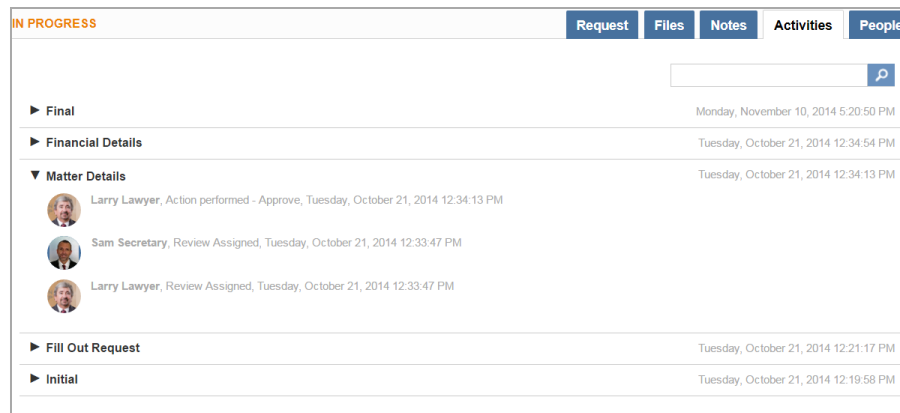


Figure 55: Activities tab

If a global or state notification has been sent out for a request, the **Activities** tab logs that. For this, the log feature should be selected for that notification in the Workflow designer. Refer to the *Administration Guide* for more details.

You can search the **Activities** tab for specific text.

View People

There are three methods of viewing the people who are working on a request. Anyone who is involved in a request appears in the list, e.g., creator of the request, assistants, reviewers, and others who have view-only or view and edit access to the request. This list of reviewers updates as you proceed with the request process and move forward through the request states.

- On the **Requests** page, click **view people** under the **Assigned User** column:

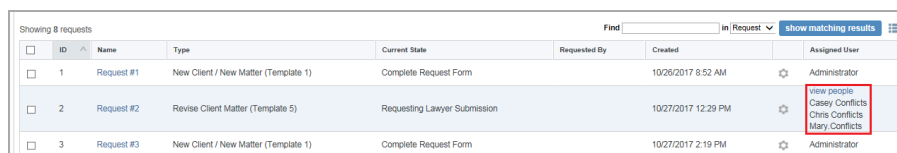


Figure 56: View people on Requests page

- Open a request to view the people working on that request in the **People** section:

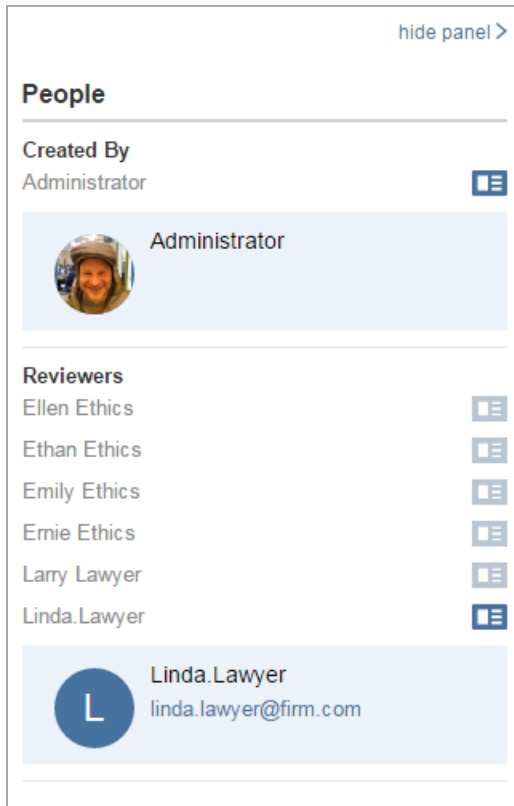


Figure 57: People working on a request

- Open a request and go to the **People** tab to view the list of people who are associated with a request:

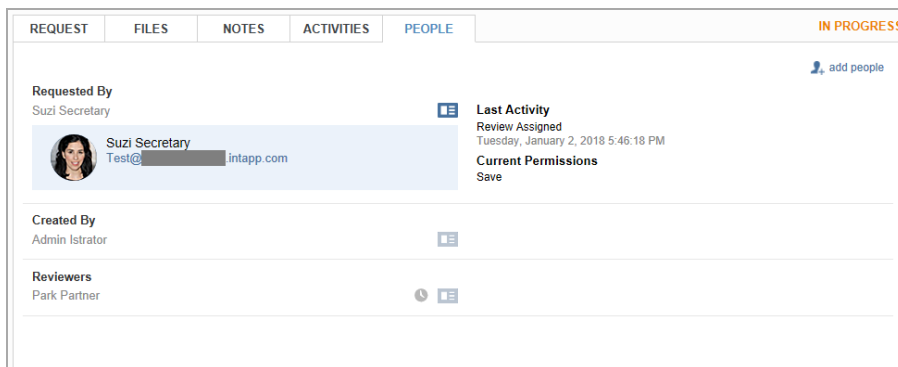


Figure 58: People tab

On the **People** tab, you can view each person's details, such as last activity performed, date and time of activity, and current permissions. Click the **add people** link to share the request with other users.

E-mail People Within a Request

To send an email message to another user working on the request, follow these steps:

1. Navigate to the **People** tab in the request, or open a profile from the request sidebar.

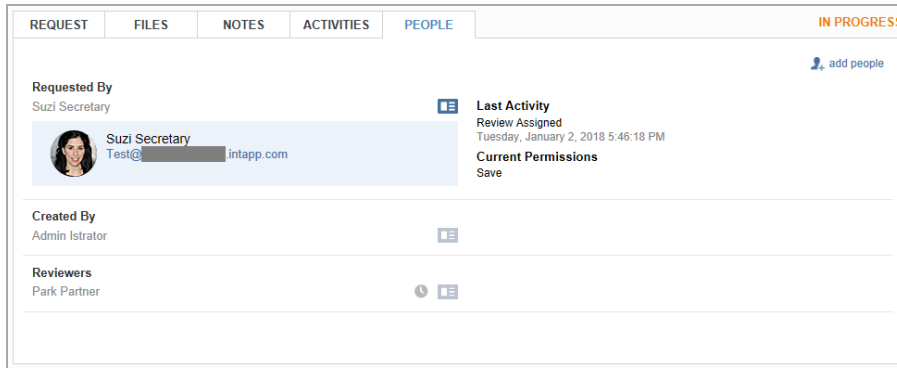


Figure 59: People tab

2. Open a contact card and click the e-mail address link. This will open a new message in your e-mail client, with a unique identifier allowing it to be tracked automatically by Intapp Flow.
3. Once you send the message, the conversation will appear as an activity in the Activities tab of the request, along with any replies.

Other e-mails replying to notifications initiated by the request will also be tracked as activities.

Note: When using the Request Conversation Tracking, notifications should include all email accounts that should be monitored.

Generate Documents within a Request

Intapp Flow has the capacity to generate a file using templates provided either through the Intapp Document Automation Service, or by two supported external document assembly services: Hotdocs and ContractExpress.

Follow these instructions to generate a document.

The document generation link text can be customized by your administrator. Here, it reads **generate file from template**. Click this link to begin generating the document.

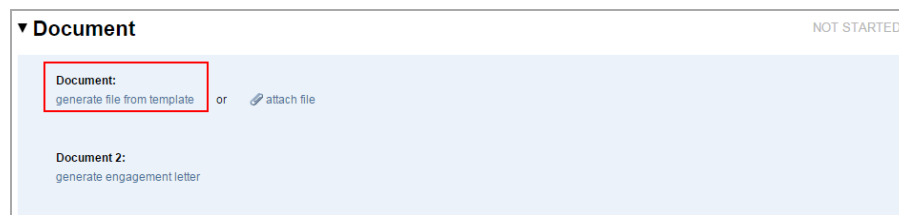


Figure 60: Link to generate documents within Intapp Flow

Documents are generated from within a specific document question on a request. The document template configured for use by the request form will automatically gather information from answers elsewhere in the request. If any information is missing, you will be prompted to enter it in a pop-up window prior to generating the document.

Figure 61: Document generation questionnaire using a Hotdocs template

Once the file is generated, a link to it will appear in the document question window, along with links any other generated documents.

You can edit the details of an existing file by hovering over the filename and clicking the **edit** link. You can associate the file with a category within the request, assign it a preset file type (such as Engagement Letter or Waiver), and apply importance levels and confidentiality settings.

To delete a file, hover over the filename, click **delete**, and confirm deletion.

Access Data Management Profiles

If the request form is integrated with a smart lookup type question, a link appears in that client, party, or matter name in the request. Click the link to open its data management profile as displayed in the figure below:

Figure 62: Entity links

The link is visible to only those users who have permissions to view the Data Management page.

Users with these permissions can click the appropriate tab to view a list of Clients, Matters, Parties, and Groups. The figure below shows a list of Clients.

CLIENTS MATTERS PARTIES GROUPS				
Showing 9 clients				
ID	Name	Created	Status	Modified
20001	Overture Science	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20002	Bank of Antarctica	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20003	Butterfly Corporation	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20004	Waystar Corporation	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20005	Apple Corporation	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20006	Valley Dew	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20007	Oracle Corporation	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20008	Atlanta, GA	10/19/2017 3:09 PM	Opened	10/19/2017 3:09 PM
20009	Adobe corp	10/27/2017 12:13 PM	Opened	10/27/2017 12:13 PM

Figure 63: Column chooser for data management pages

The columns visible in these lists can be customized by a column chooser, just like the list of requests (see *Grid Display*). Click the **choose columns to show in grid**  icon to display a list of column options. Columns currently displayed are shown on the list in boldface with dots beside them. The list is made up of all the fields configured to be shown in each data management profile page. Administrators may make changes to this configuration as needed.

Print a Request

You can print a populated request or a blank request form through the application.

To print a request:



1. Open a request and click the **Print** icon  to display the following options:
 - **Print this request** to print the request form with all answers.

PRINT OPTIONS

Include request comments:

Include request attached files:

Include request notes:

Include request activities:

Include people working on this request:

print

cancel

Figure 64: Print options

You have the option to print comments, attached files, notes, activities, and people list along with the request.

- **Print a blank request** form to print a blank form with only questions.
 - **Print request activities** to print only logged activities of a request that are displayed on the **Activities** tab.
2. The request opens on a separate page on your browser. Click the **Print** icon  to send the print command to the printer.

TASKS

This chapter provides information on the Intapp Flow Tasks module.

It consists of the following topics:

About Tasks

Creating a Task

Tasks Page Options

About Tasks

Tasks are activities related to a process or workflow – but not necessarily embedded within the workflow – that can be assigned and completed without passing through an approval state. For example, in the context of a User Provisioning request, there might be a need to assign tasks such as **Order Phone** or **Set up desk for new hire**. These tasks don't need approval, but they should be assigned to one person or group who can then act on them.

You can create tasks if the Tasks module has been enabled within your system, and if you have the necessary capabilities (Create Task, Edit Task, or Admin privileges).

Follow the instructions below to create a new task.

Creating a Task

Follow the steps below to create a task:

1. Click the **create new task** button to generate a new task. The **create new task** button can be found in four places:
 - On the Dashboard
 - On a Client Profile page
 - On a Matter Profile page
 - Above the Tasks list, accessible from the Tasks tab.
2. The **Create a new task** window appears.

Create a new task

Name: (required)

Description:

B ***I*** **U**
☰ ☰ ☰ ☰
☰ ☰

Assigned To: (required) **Due Date:**

Priority:

Client:

Matter:

Department: **Expiration Date:**

[create task](#) [cancel](#)

Figure 65: Task Details

- a. Give your task a name (required).
 - b. Assign the task to one or more users or groups. This is a required field. The task is assigned to the creator by default.
 All remaining fields are optional (although some may be required by your firm):
 - c. Add a description of the task. You may use rich-text formatting options such as bulleted lists and hyperlinks.
 - d. Assign a due date to the task as needed. The due date must not be set earlier than the date when the task was created.
 - e. Assign the task a priority from the drop-down list.
 - f. Associate the task with a client and/or matter.
 - g. Enter a relevant Department and Office for this task.
 - h. Enter an Expiration Date for the task. This must be on or after the Due Date.
 - i. Use the radio buttons to mark the task **Optional** and/or **Urgent**.
3. Once you have filled in the task details, click **create task** to save your changes.

Note: The task details page will open in a new tab. Please configure your browser to allow pop-ups from the Intapp Flow website.

Once you save the task, it will be assigned to the users and groups you specified. They will receive a notification containing a link to the new task.

Claim or Release a Task

To take (or give up) ownership of a task, you can use the Claim and Release features described below. Generally, members of the group to which the task is assigned can claim the task and then, if necessary, release it to other group members. The creator of a task and any users with Edit Task capability can also claim and release the task. Only Tasks assigned to groups will show a **claim** button by default. Once claimed by a user, the **release** button will be visible to release the Task back to the previously assigned group.

See the *Assign a Task* section for information on assigning a task to another user or group.

- **Claim:** If you are one of the users mentioned above, click the **claim** button on the Task Details page to claim the task. Once claimed, the task will be locked to other users (unless it is released). The user who has claimed the task must either complete or release it.
- **Release:** If you have claimed a task previously but want to unlock it for others to act upon, you can use the **Release** button. The **Claim** button becomes available again if you release a task.

Assign a Task

The Assign Task functionality enables a user to assign or re-assign an incomplete task to another user or group. Users with Edit Task capability or Admin capability, the task creator, and the current task assignee can assign or re-assign a task.

In the example below you will re-assign a task to a different user group. Before following these steps, you must claim the task yourself.

1. Click the **re-assign** button.

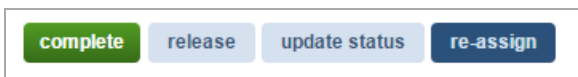


Figure 66: Re-assigning a task

2. In the dialog box, type the name of a user or group in the lookup field and select the desired result. You can assign the task to more than one user or group.

A dialog box titled 'Re-assign Task'. It features a search bar with 'IT Group *' entered and a magnifying glass icon. Below the search bar is a text area for 'Add a comment:' with a character count '0 of 500 characters.' at the bottom. At the bottom right are two buttons: 'assign' and 'cancel'.

Figure 67: Assign task dialog box

3. Type in a comment as needed.
4. Click **assign**.

Because users with Edit Task or Admin capability and the task creator can all edit Task details, they can also assign the task by directly changing the Assign To field in the Details section.

Add Comments

Use the comments feature to provide additional information or leave a comment for another user assigned to the task. Any user with access to the task can leave a comment.

To add comments to a task:

1. Open an existing task.
2. Scroll down to the **Comments** header on the task **Details** page. Previous comments will appear above the text entry field.

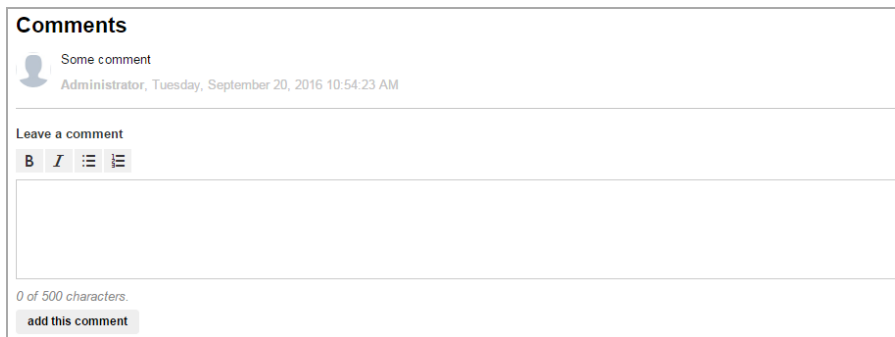


Figure 68: Comment entry field for task

3. Type your comment. Some rich text formatting is available. When you are finished, click **add this comment**.

You can edit the text of a comment, or remove the comment, by hovering over the comment text and clicking the **edit** or **remove** links that appear below it. If you edit the comment, it will be marked (**Modified**).

Attach Files

Any user with access to a task can attach multiple files to the task and notify people of the attachment.

Follow the steps below to attach files to a task:

1. Navigate to the **Files** tab on the **Task Details** page and click **attach file**.

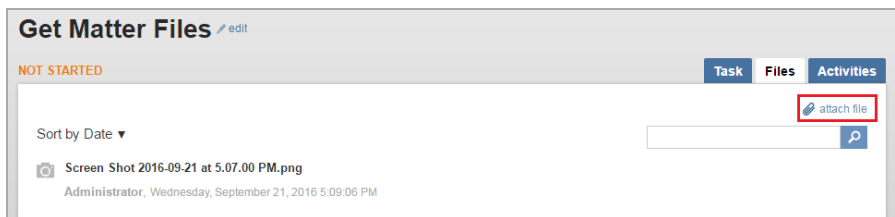


Figure 69: File attachment dialog

The **Attach a file** dialog box will appear:

Figure 70: File attachment dialog

2. Click **Choose a file** to select a file of any format. You can drag files over the “Drag files here” text, or click **add files** to search by name. You may also drag and drop files from a variety of document management systems, and links to those files will appear in the **Attached Files** list for other users to follow.
3. Add a comment to accompany the attachment if desired.
4. Click **attach** to attach the selected file(s) to a request.

These files appear in a list in the **Files** tab, which can be sorted by Date, Name, or Creator. Files can be deleted by the user who uploaded them, or by any user with Edit Task or Admin capability.

View Activities

On the **Activities** tab, you can view activities performed by each person working on the task, along with the date and time of each activity. You can also sort activities by date and name. You can view people’s pictures on the **Activities** tab if the administrator added one to the user profile.

Figure 71: Activities list sorted by date

You can search the **Activities** tab for specific text.

Update Task Status

If you are the owner of a task – because it was assigned to you directly or because you have claimed it – you can update the task status by clicking the **update status** button.

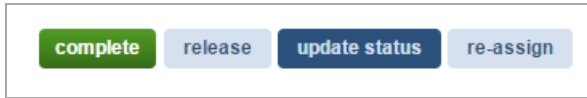


Figure 72: Update Status button

Choose a new task status from the drop-down list. Leave a comment as needed and click proceed.

Figure 73: Update status dialog box

The new task status will be displayed at the top of the task details page.

Complete a Task

If you are the owner of a task – because it was assigned to you directly or because you have claimed it – you can mark the task complete by clicking the **complete** button. Once it is marked complete, the task will become read-only.

Tasks Page Options

To view the Tasks page, log in to the application and click the **Tasks** tab. The figure below displays the **Tasks** page:

Tasks											
Active Completed Your tasks Unassigned Assigned to you Overdue create new task											
Showing 33 Find in Task show matching results											
ID	Name	Due Date	Priority	Assigned To	Status	Client Name	Matter Name	Request Name	Created By	Created Date	Last Modified Date
3	Task #3		Very High	Administrator	On Hold	Apple Inc			Administrator	9/6/2016 6:30 PM	9/21/2016 2:50 PM
15	Task #15	10/12/2016 9:00 AM	Very High	Administrator	Not Started	Apple Inc	Samsung vs Apple		Administrator	9/6/2016 9:29 PM	9/22/2016 4:22 PM
18	Order Phone	9/28/2016 5:00 PM	Very High	Administrator	On Hold	Apple Inc		Request #8		9/7/2016 2:23 PM	9/7/2016 3:11 PM
7	Order Laptop (for milan)	9/30/2016 9:09 PM	Very High	Administrator	In Progress	Apple Inc	Samsung vs Apple	Request #2		9/6/2016 7:09 PM	9/20/2016 10:55 AM
28	Order Laptop	9/22/2016 10:48 AM	Very High	IT Group	Not Started	Intapp Inc		Request #13		9/20/2016 10:48 AM	9/21/2016 5:42 PM
4	Task #4	9/30/2016 12:00 AM	High	Administrator	Not Started	Apple Inc	Samsung vs Apple		Administrator	9/6/2016 6:32 PM	9/6/2016 6:33 PM

Figure 74: Tasks page

Filter Tasks

You can filter your tasks list using the following options, which appear as links above the grid:

- **Active:** A task that is not yet completed.
- **Completed:** A task that has been marked as complete.
- **Your tasks:** Tasks in which you are the creator.
- **Unassigned:** Tasks that are unassigned or unclaimed.
- **Assigned to you:** Tasks that are assigned to you currently.
- **Overdue:** Tasks whose due date has passed.

Intapp Flow remembers your filter settings and when you log back in, the request list is displayed using your previous settings.

Grid Display for Tasks List

To display specific columns in the tasks list, you can use the **choose columns to show in grid**  icon. On the **Tasks** page, click the icon to view a list of columns that you can add or remove on the grid. Dots next to column names in the figure below indicate that they are being displayed on the grid.

Tasks											
Active Completed Your tasks Unassigned Assigned to you Overdue create new task											
Showing 33 Find in Task show matching results											
ID	Name	Due Date	Priority	Assigned To	Status	Client Name	Matter Name	Request Name	Created By	Created Date	Last Modified Date
3	Task #3		Very High	Administrator	On Hold	Apple Inc			Administrator	9/6/2016 6:30 PM	9/21/2016 2:50 PM
15	Task #15	10/12/2016 9:00 AM	Very High	Administrator	Not Started	Apple Inc	Samsung vs Apple		Administrator	9/6/2016 9:29 PM	9/22/2016 4:22 PM
18	Order Phone	9/28/2016 5:00 PM	Very High	Administrator	On Hold	Apple Inc		Request #8		9/7/2016 2:23 PM	9/7/2016 3:11 PM
7	Order Laptop (for milan)	9/30/2016 9:09 PM	Very High	Administrator	In Progress	Apple Inc	Samsung vs Apple	Request #2		9/6/2016 7:09 PM	9/20/2016 10:55 AM
28	Order Laptop	9/22/2016 10:48 AM	Very High	IT Group	Not Started	Intapp Inc		Request #13		9/20/2016 10:48 AM	9/21/2016 5:42 PM
4	Task #4	9/30/2016 12:00 AM	High	Administrator	Not Started	Apple Inc	Samsung vs Apple		Administrator	9/6/2016 6:32 PM	9/6/2016 6:33 PM

Assigned To

Client Name

Client Number

Created By

Created Date

Department

Due Date

Expiration Date

ID

Last Modified By

Last Modified Date

Matter Name

Matter Number

Name

Office

Optional

Priority

Request Name

Status

Urgent

Figure 75: Grid display options

You may also use many of the user interface features described in *User Preferences* with the Tasks module, such as Quick Find and column sorting. Please refer to *User Preferences* for details.

Users with permission to view client and matter profiles can view all tasks for a particular client or matter from the Client/Matter profile page.



Figure 76: Link to client tasks

INTAPP FLOW REPORTS

This chapter provides information on types of Intapp Flow reports and their purpose.

It consists of the following topics:

About Reports

Request Summary Report

Request Duration Report

Request Completion Time Series Report

Client Matter Details Report

Client Matter List Report

Client Matter Attorney Report

Editing a Report

Report Features

About Reports

Intapp Flow reports are designed to give you a graphical representation of a set of requests. You can view reports for only those requests that are available to you. You may view information about a single request or cumulative data on multiple requests. To generate data for multiple requests, Intapp Flow calculates and displays results on an average basis. This provides you an overview of the request behavior and helps to determine if any improvement is required in the request process. Based on the required request information, you can generate reports using grouping criteria to select specific options. You can create, edit, and view the following types of reports:

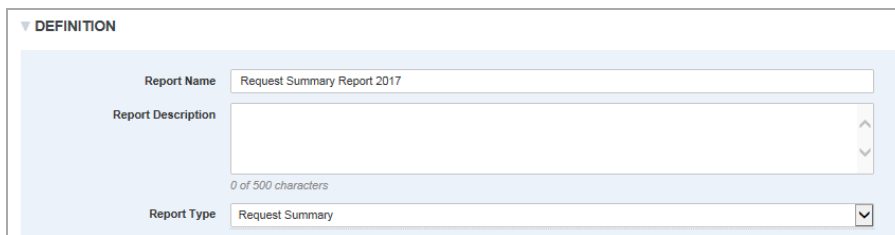
- **Request Summary:** Displays a summary of requests based on certain grouping criteria, such as request status, request type, request creation date, and so on.
- **Request Duration:** Displays information on how long a request stayed in a particular workflow state. If the duration is longer than required, appropriate action can be taken. This report displays only completed requests.
- **Request Completion Time Series:** Displays information on how long it takes a request to reach its state of completion. This enables you to analyze the Request process and find improvements. This report displays only completed requests.

To view a list of reports that have already been generated, click the **Reports** tab on the main navigation bar.

Request Summary Report

The following steps provide a sample of how to generate a request summary report, showing requests for the current year:

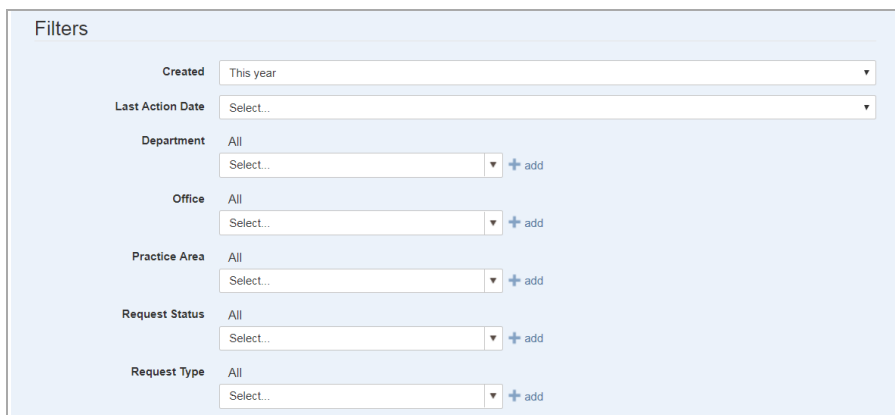
1. Click **create new report** on the **Reports** page.
2. Type a report name on the **New Report** page.
3. Select the report type as **Request Summary**.



The screenshot shows a form titled 'DEFINITION' with a light blue header. Below the header, there are three input fields: 'Report Name' with the value 'Request Summary Report 2017', 'Report Description' which is empty, and 'Report Type' with a dropdown menu showing 'Request Summary'. A character count '0 of 500 characters' is visible below the description field.

Figure 77: Request summary report definition

The report parameters appear.



The screenshot shows a 'Filters' section with a light blue header. Below the header, there are several filter options, each with a dropdown menu and an 'add' button: 'Created' (This year), 'Last Action Date' (Select...), 'Department' (All, Select...), 'Office' (All, Select...), 'Practice Area' (All, Select...), 'Request Status' (All, Select...), and 'Request Type' (All, Select...).

Figure 78: Request summary report filters

4. Select **this year** in the **Created** filter, then scroll down to Options.

Options

Report Title

Group By
Request Type

Range Date
Created

Range Increment
Month

PERMISSIONS

run report
cancel

Figure 79: Request summary report options

5. Type a report title that will appear on the generated report.
6. Click **run report** to view the generated report based on the options that you selected.

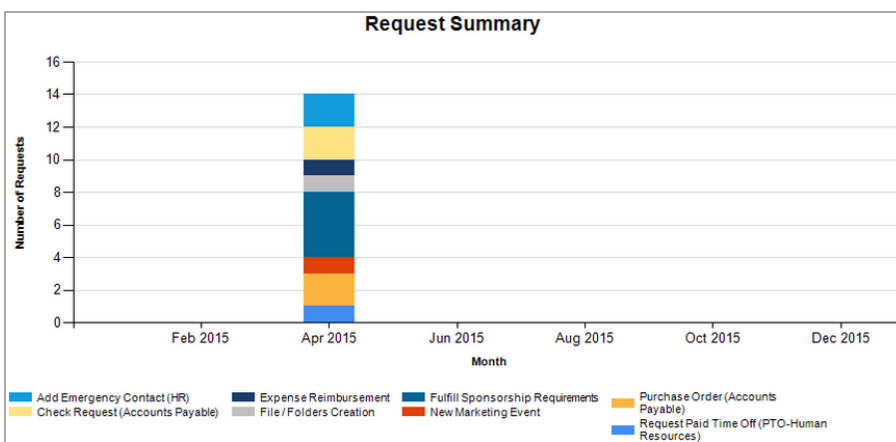


Figure 80: Request Summary Report

Each request type is represented by a different color. The above graph displays request types for the current year (broken down by month).

7. Click **save** to save the report or **save as** to save the report with another name.

Request Summary Report Parameters

The following table describes the Request Summary Report parameters:

Field	Description
Filters	

Field	Description
Created	Enables you to select a specific time period, e.g. this year, this week, this month, and so on, to capture requests that were created during that time period.
Last action date	Enables you to select a specific time period to capture requests that were last acted upon during that time period.
Department	Enables you to filter the report by a specific department. You can add multiple values to this filter by selecting a value, then clicking the “Add” text to the right of the drop-down menu. Repeat this selection process for each new value. The default value is All.
Office	Enables you to filter the report by a specific office location. You can add multiple values to this filter. The default value is All.

Field	Description
Practice area	Enables you to filter the report by a specific practice area, such as Litigation or Mergers and Acquisition. You can add multiple values to this filter. The default value is All.
Request status	Displays all requests whose status is Complete, In Progress, Needs Attention, and/or Not Started. You can add multiple values to this filter. The default value is All.
Request type	Lists all request types. You can add multiple values to this filter. The default value is All.
Options	
Report title	Title that appears on the generated report. It is a required option.
Group by	Enables you to group a report by one of the following options: • Department • Office • Practice Area • Request Status

Field	Description
	Request Type This determines the legend, the bar titles, and the data table row labels. Default value grouping is by Request Type.
Range date	Allows you to choose whether to group requests by their Created or Last Action dates. Default value is Created.
Range increment	Determines the x-axis of the report bar graph and the data table header row labels. Options are Day, Week, Month, and Year. Default value is Month.

Request Duration Report

The following steps will generate a sample request duration report. These reports allow you to evaluate how long a request has remained in each state.

1. Click **create new report** on the **Reports** page.
2. Type a report name on the **New Report** page.
3. Select the report type as **Request Duration**.

▼ DEFINITION

Report Name: Request Duration Report 2017

Report Description:
0 of 500 characters

Report Type: Request Duration

Figure 81: Request Duration Report Definition

The report parameters appear.

Report name:Hours per state

Report type:Request Duration

Filters:

Request type:Purchase Order (Accounts Payable)

Created:this year

Last action date:-- No filter --

Department:All

Office:All

Practice area:All

Options:

Report title:Average Hours in state for Purchase Order (Acc

Graph style:PieBar

Include hold times:

Figure 82: Request Duration Report - Parameters

- 4. Select the **Request Type** filter
- 5. Select **this year** in the **Created** filter, then scroll down to Options.

Figure 83: Request Duration Report - Options

- 6. Type a report title that will appear on the generated report.
- 7. Click **run report** to view the generated report based on the options that you selected.

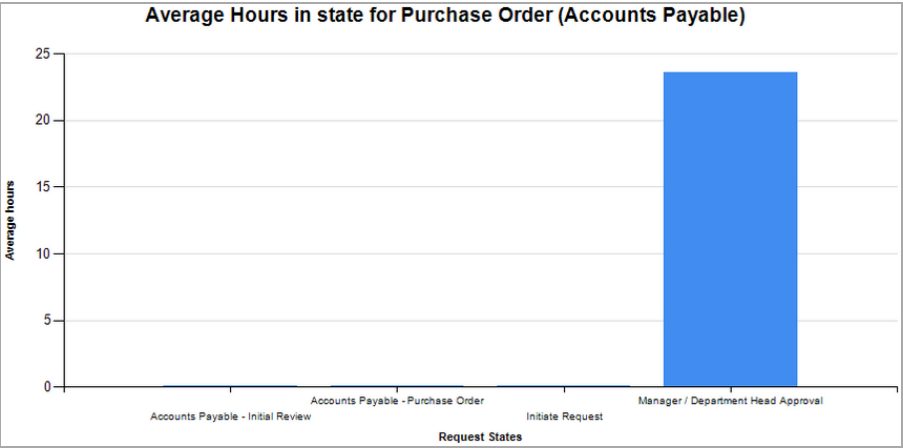


Figure 84: Request Duration Report

The X-axis represents request states, and the Y-axis represents the average number of hours spent by a request in each state.

8. Click **save** to save the report or **save as** to save the report with another name.

Request Duration Report Parameters

The following table describes the Request Duration Report parameters:

Field	Description
Filters	
Request type	Lists all request types. You can select one request type to generate a report of all requests of that type.
Created	Enables you to select a specific time period, e.g. this year, this week, this month, and so on, to capture requests that were created during that time period.
Department	Enables you to filter the report by a specific department. You can add multiple values to this filter by selecting a value, then clicking the “Add” text to the right of the drop-down menu. Repeat this selection process for each new value. The default value is All.
Office	Enables you to filter the report by a specific office location. You can add multiple values to this filter. The default value is All.
Practice area	Enables you to filter the report by a specific practice area, such as Litigation or Mergers and Acquisition. You can add multiple values to this filter. The default value is All.
Options	
Report title	Title that appears on the generated report. It is a required option.

Field	Description
Graph style	Provides you the option to view the report graph in one of the following styles: • Pie: Generates the report in the form of a pie chart diagram. • Bar: Generates the report in the form of bar chart.

Request Completion Time Series Report

The following steps will generate a sample request completion report. These reports allow you to evaluate average completion times for requests of a specified type.

1. Click **create new** report on the **Reports** page.
2. Type a report name on the **New Report** page.
3. For **Report Type**, select **Request Completion Time Series**.

The report parameters appear.

Report name:
Average Request Completion Duration

Report type:
Request Completion Time Series

Filters:

Request type:
Purchase Order (Accounts Payable)

Created:
this year

Department:
All

+ add

Office:
All

+ add

Practice area:
All

- Select practice area -

+ add

Options:

Report title:
Average Request Completion Duration

Group by:
☒ None
☐ State

Range increment:
Month

Include hold times:
☐

Filters

Request Type
New Client / New Matter (Template 1)

Created
This year

Department
All

Select...

+ add

Office
All

Select...

+ add

Practice Area
All

Select...

+ add

Options

Report Title
Average completion time for New Client / New Matter (Template 1)

Group By
State

Range Increment
Month

Include hold times
☐

Figure 85: Request Completion Time Series Report - Parameters

4. Select the **Request Type** filter
5. Select **this year** in the **Created** filter
6. Type a report title that will appear on the generated report
7. Group by State to view the requests by its states.
8. Select **Range** increment as **Month** to view the graph categorized by months.
9. Click **run report** to view the generated report based on the options that you selected.

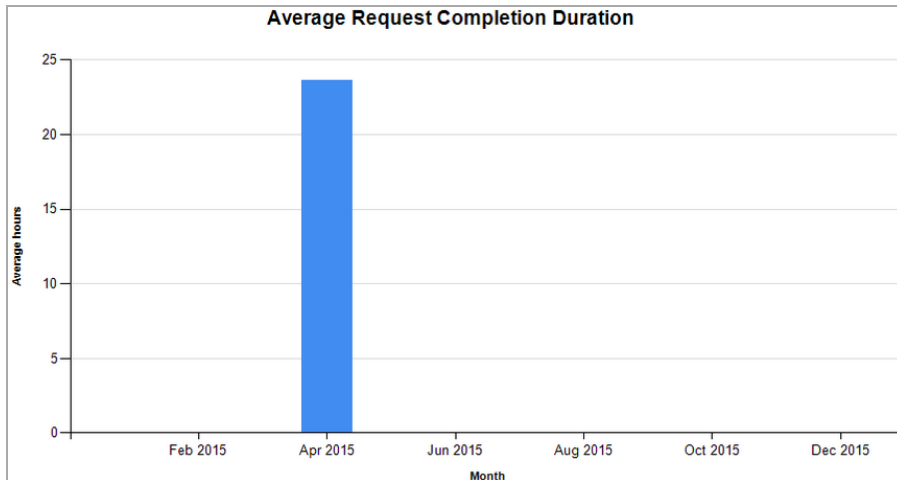


Figure 86: Request Completion Time Series Report

X-axis represents completed requests for different months. Y-axis represents the number of hours. The bars show average completion time of requests and their states.

- Click **save** to save the report or **save as** to save the report with another name.

Request Completion Time Series Report Parameters

The following table describes the Request Completion Time Series Report parameters:

Field	Description
Filters	
Request type	Lists all request types. You can select one request type to generate a report with requests that were created using the specified request type.
Created	Enables you to select a specific time period to capture requests that were created during that time period. Some of the options that you can filter by are: this year, this week, this month, and so on.
Department	Enables you to filter the report by a specific department. You can add multiple values to this filter, default value being All.
Office	Enables you to filter the report by a specific office location. You can add multiple values to this filter, default value being All.
Practice area	Enables you to filter the report by a specific practice area, such as, Litigation and Mergers and Acquisition.

Field	Description
	You can add multiple values to this filter, default value being All.
Options	
Report title	Title that appears on the generated report. It is a required option.
Group By	Enables you to group your reports by one of the following options: • None: Shows completed requests without any grouping. • State: Shows completion time for requests and their states. Each state is represented in a different color on the graph bar.
Range increment	Determines the X-axis of the report bar graph and the data table header row labels. Options are Day, Week, Month, and Year. Default value is Month.

Client Matter Details Report

The following steps provide a sample of how to generate a client/matter details report, which enables a variety of custom charts to show client or matter information:

1. Click **create new report** on the **Reports** page.
2. Type a report name on the **New Report** page.
3. Select the report type as **Client Matter Details**.

The report parameters appear.

Filters

Clients

Client Status All + add

Client Opened On

Client Closed On

Client Last Bill Date

Client Last WIP Date

Client Office All + add

Figure 87: Client Matter Details report parameters

- Once you have selected parameters, click **run report** to view the generated report based on the options that you selected.

1 of 2 ?

Find | Next

Client/Matter Details Report

Client: Apple Corporation

Client Name	Apple Corporation			Client ID	20005
Opened On		Closed On		Status	Opened
Industry				Office	
Total WIP		Last WIP Date			
Total AR		Last Bill Date			
Description					

Matter: Bluebear Property Matter

Matter Name	Bluebear Property Matter			Matter ID	0002
Opened On		Closed On		Status	Active
Department		Office		Practice Area	
Total WIP		Last WIP Date			
Total AR		Last Bill Date		Billible	Yes
Description					

Matter: China Anittrust Settlement

Matter Name	China Anittrust Settlement			Matter ID	0003
Opened On		Closed On		Status	Active
Department		Office		Practice Area	
Total WIP		Last WIP Date			
Total AR		Last Bill Date		Billible	Yes
Description					

Figure 88: Client Matter Report

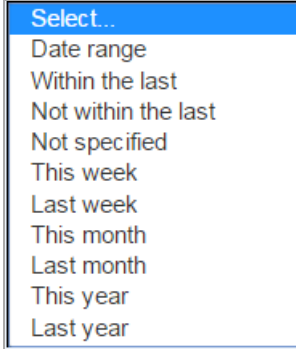
The above report displays all matters for the selected client in an easy-to-read grid format.

- Click **save** to save the report or **save as** to save the report with another name.

Client/Matter Details Report Parameters

The following table describes the Client/Matter Details Report parameters:

Field	Description
Filters	
Clients	Use this lookup field to select clients to include in the report.
Client Status	All clients are selected by default, but you can filter by either Open or Closed clients.
Client Opened On	Set date parameters to filter the list of clients by date opened. Date and date range options are shown below. (Note that you can

Field	Description
	choose to leave the date range Not specified.) 
Client Closed On	Set date parameters to filter the list of clients by date closed. The options are the same as in the previous filter.
Client Last Bill Date	Set date parameters to filter the list of clients by last bill date. The options are the same as in the previous filter.
Client Last WIP Date	Set date parameters to filter the list of clients by last WIP date. The options are the same as in the previous filter.
Client Office	Use this filter to restrict the client list to a particular office for your firm (for example, all clients of the Los Angeles office).
Client Industry	Use this filter to show all clients for one or more industries.
Client Attorney	Use this lookup field to add names of client attorneys to the filter list.
Client Attorney Type	Use this field to filter by different attorney relationships: originating attorney, billing attorney, and so on.
Matter Status	All matters are selected by default, but you can filter by either Open or Closed matters.
Matter Opened On	Set date parameters to filter the list of matters by date opened. Date and date range options are shown below. (Note that you can choose to leave the date range Not specified.)

Field	Description
	Select... Date range Within the last Not within the last Not specified This week Last week This month Last month This year Last year
Matter Closed On	Set date parameters to filter the list of matters by date closed. The options are the same as in the previous filter.
Matter Last Bill Date	Set date parameters to filter the list of matters by last bill date. The options are the same as in the previous filter.
Matter Last WIP Date	Set date parameters to filter the list of matters by last WIP date. The options are the same as in the previous filter.
Matter Department	Filter by one or more departments associated with matters.
Matter Office	Use this filter to restrict the matter list to a particular office for your firm (for example, all matters from the Los Angeles office).
Matter Practice Area	Filter by practice area to which the matters are assigned.
Matter Billable	Select either Billable or Non-Billable matters.
Matter Attorney	Filter by attorney assigned to each matter.
Matter Attorney Type	Use this field to filter by different attorney relationships: originating attorney, billing attorney, and so on.
Options	
Show...	Click the checkboxes to show the following items: - Client Attorneys - Client Parties (you may select certain affiliations or include

Field	Description
	all) - Client Address - Matter Summary by Status, Office, or Practice Area - Matters - Matter Attorneys (if Matters is selected) - Matter Parties (if Matters is selected) - Matter Addresses (if Matters is selected)
Sort By	Choose whether to sort data by Client/Matter Name or ID.

Client Matter List Report

The following steps provide a sample of how to generate a client/matter list report, a simple listing of clients and their matters with a variety of filters:

1. Click **create new report** on the **Reports** page.
2. Type a report name on the **New Report** page.
3. Select the report type as **Client Matter List**.

The report parameters appear.

Figure 89: Client Matter Details report parameters

4. Once you have selected parameters, click **run report** to view the generated report based on the options that you selected.

Client/Matter List							
ID	Name	Status	Opened On Closed On	Total WIP Total AR	Last WIP Last BILL	Industry Department	Office Practice
20005	Apple Corporation	Opened	02/01/2017				
0002	Bluebear Property Matter	Active					
0003	China Anitrust Settlement	Active					
0004	Doors Trademark Dispute	Active					
0005	Expandor Dispute	Active					
0001	Long Matter Name	Active					
20008	Atlanta, GA	Opened	02/01/2017				
0001	Atlanta Matter	Active					

Figure 90: Client Matter List Report

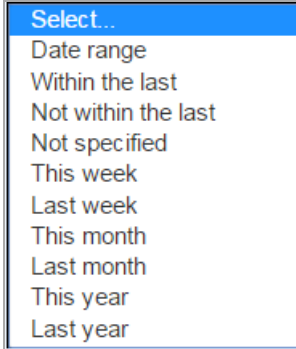
The above report displays all matters for the selected client in an easy-to-read grid format.

- Click **save** to save the report or **save as** to save the report with another name.

Client/Matter List Report Parameters

The following table describes the Client/Matter List Report parameters:

Field	Description
Filters	
Clients	Use this lookup field to select clients to include in the report.
Client Status	All clients are selected by default, but you can filter by either Open or Closed clients.
Client Opened On	Set date parameters to filter the list of clients by date opened. Date and date range options are shown below. (Note that you can choose to leave the date range Not specified .) Select... Date range Within the last Not within the last Not specified This week Last week This month Last month This year Last year
Client Closed On	Set date parameters to filter the list of clients by date closed. The options are the same as in the previous filter.

Field	Description
Client Last Bill Date	Set date parameters to filter the list of clients by last bill date. The options are the same as in the previous filter.
Client Last WIP Date	Set date parameters to filter the list of clients by last WIP date. The options are the same as in the previous filter.
Client Office	Use this filter to restrict the client list to a particular office for your firm (for example, all clients of the Los Angeles office).
Client Industry	Use this filter to show all clients for one or more industries.
Client Attorney	Use this lookup field to add names of client attorneys to the filter list.
Client Attorney Type	Use this field to filter by different attorney relationships: originating attorney, billing attorney, and so on.
Matter Status	All matters are selected by default, but you can filter by either Open or Closed matters.
Matter Opened On	Set date parameters to filter the list of matters by date opened. Date and date range options are shown below. (Note that you can choose to leave the date range Not specified.) 
Matter Closed On	Set date parameters to filter the list of matters by date closed. The options are the same as in the previous filter.
Matter Last Bill Date	Set date parameters to filter the list of matters by last bill date. The options are the same as in

Field	Description
	the previous filter.
Matter Last WIP Date	Set date parameters to filter the list of matters by last WIP date. The options are the same as in the previous filter.
Matter Department	Filter by one or more departments associated with matters.
Matter Office	Use this filter to restrict the matter list to a particular office for your firm (for example, all matters from the Los Angeles office).
Matter Practice Area	Filter by practice area to which the matters are assigned.
Matter Billable	Select either Billable or Non-Billable matters.
Matter Attorney	Filter by attorney assigned to each matter.
Matter Attorney Type	Use this field to filter by different attorney relationships: originating attorney, billing attorney, and so on.
Options	
Show...	Click the checkboxes to show the following items: • Report Title • Client Attorneys • Attorney Type • Matters • Matter Attorneys (if Matters is selected) • Attorney Type
Sort By	Choose whether to sort data by Client/Matter Name or ID.

Client Matter Attorney Report

The following steps provide a sample of how to generate a client/matter attorney report, usually for a specific user, which shows all matters and clients associated with a particular attorney:

1. Click **create new report** on the **Reports** page.
2. Type a report name on the **New Report** page.
3. Select the report type as **Client Matter Attorney**.

The report parameters appear.

Filters

Attorney

Clients

Client Status All
 + add

Client Opened On

Client Closed On

Client Last Bill Date

Client Last WIP Date

Client Office All
 + add

Client Industry All
 + add

Matter Status All
 + add

Figure 91: Client Matter Attorney report parameters

4. Once you have selected parameters, click **run report** to view the generated report based on the options that you selected.

2 of 2 Find | Next

Client/Matter Attorney

Name: **George Geecee** Office: **PALO ALTO**

ID	Name	Status	Opened On Closed On	Total WIP Total AR	Last WIP Last BILL	Industry Department	Office Practice
20005	Apple Corporation	Opened	02/01/2017				
0003	China Anitrust Settlement	Active					
20008	Atlanta, GA	Opened	02/01/2017				
0001	Atlanta Matter	Active					
20006	Valley Dew	Opened	02/01/2017				

Figure 92: Client Matter Attorney Report

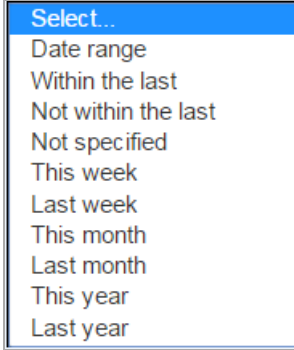
The above report displays all attorneys for the selected clients and matters in an easy-to-read grid format.

5. Click **save** to save the report or **save as** to save the report with another name.

Client/Matter Attorney Report Parameters

The following table describes the Client/Matter Attorney Report parameters:

Field	Description
Filters	
Attorney (required)	Use this lookup field to select one or more attorneys. Each attorney's clients and matters will be listed on a separate page.
Clients	Use this lookup field to select clients to include in the report.

Field	Description
Client Status	All clients are selected by default, but you can filter by either Open or Closed clients.
Client Opened On	Set date parameters to filter the list of clients by date opened. Date and date range options are shown below. (Note that you can choose to leave the date range Not specified.) 
Client Closed On	Set date parameters to filter the list of clients by date closed. The options are the same as in the previous filter.
Client Last Bill Date	Set date parameters to filter the list of clients by last bill date. The options are the same as in the previous filter.
Client Last WIP Date	Set date parameters to filter the list of clients by last WIP date. The options are the same as in the previous filter.
Client Office	Use this filter to restrict the client list to a particular office for your firm (for example, all clients of the Los Angeles office).
Client Industry	Use this filter to show all clients for one or more industries.
Matter Status	All matters are selected by default, but you can filter by either Open or Closed matters.
Matter Opened On	Set date parameters to filter the list of matters by date opened. Date and date range options are shown below. (Note that you can choose to leave the date range Not specified .)

Field	Description
	Select... Date range Within the last Not within the last Not specified This week Last week This month Last month This year Last year
Matter Closed On	Set date parameters to filter the list of matters by date closed. The options are the same as in the previous filter.
Matter Last Bill Date	Set date parameters to filter the list of matters by last bill date. The options are the same as in the previous filter.
Matter Last WIP Date	Set date parameters to filter the list of matters by last WIP date. The options are the same as in the previous filter.
Matter Department	Filter by one or more departments associated with matters.
Matter Office	Use this filter to restrict the matter list to a particular office for your firm (for example, all matters from the Los Angeles office).
Matter Practice Area	Filter by practice area to which the matters are assigned.
Matter Billable	Select All (default), Billable, or Non-Billable matters.
Options	
Show...	Click the checkboxes to show the following items: - Report Title - Matters
Sort By	Choose whether to sort data by Client/Matter Name or ID.

Editing a Report

After you run a report, you can edit the report definition to view a different output. You can also view or edit the **Permissions** section if you have appropriate privileges.

PERMISSIONS

Define users and groups who can edit this report

Users Groups

✓ = Allow ✗ = Deny ☐ = Inherit

Username	Full Name	View	Edit
No permissions have been added.			

+ add

Figure 93: Report Definition and Permissions

The application takes the following considerations into account when applying permissions:

- **Permissions do not override capabilities**

If a user has Edit Report capability, then the user can access all reports in the system and cannot be denied permission at all. However, if a user does not have that capability, that user can be exclusively granted or denied permission on reports (or other individual components, such as Workflows, Notifications, Integrations, and Forms).

For example: If Larry does not have Edit Report capability, Admin (or any user with Grant Report Permission Capability and Edit Report capability) can allow Larry to edit a particular report in the system by using permissions. These permissions can also be granted to user groups.

- **Deny permission takes precedence over Grant permission**

If a user or group (without Edit capability for a component) has been denied permission on any component, then that permission will be respected even if that user (or users in a group) is granted permission individually or through another group.

For example: If Amy Analyst has been denied permission to edit the Revenue report, then even if she is granted permission through the Analysts group, she will not be able to edit the report. Deny permission gets precedence over Grant permission. In this case, Amy Analyst can edit the Revenue report only if she is given Edit Report capability or the deny permission is removed.

- **Inherit Permission**

If the user granting permission to another user or group is not sure about a particular user's or group's existing permissions, it can be set to "inherit permission" by being left blank. The user or group will be granted or denied permission based on other groups to which that user belongs or capabilities.

For example, if the Admin is not sure if Amy has Edit Report permissions or not, then the Edit Report checkbox can be left blank. This permission will be inherited from Amy's group.

In short, if a user or group does not have a particular edit capability like Edit Report, Edit Form, then the permissions

decide if a user has access to that component based on the following metric:

Group \ User	Grant	Deny	Inherit
Grant	✓	✗	✓
Deny	✗	✗	✗
Inherit	✓	✗	✗

The figure below is an example of different permissions granted to different users:

PERMISSIONS

Define users and groups who can edit this report

Users (5)

Groups (0)

✓ = Allow ✗ = Deny □ = Inherit

Username	Full Name	View	Edit		
Amy.Analyst	Amy Analyst	✓	□	edit	delete
Casey.Conflicts	Casey Conflicts	✓	✗	edit	delete
Cathy.Corporate	Cathy Corporate	✓	✓	edit	delete
Sam.Secretary	Sam Secretary	✗	✗	edit	delete
Mary.Mergers	Mary Mergers	✓	✓	edit	delete

<< < 1 > >>

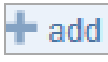
20 items per page

1 - 5 of 5 items

+ add

Figure 94: Permissions

Follow these steps to grant permissions:

1. Click the  icon to display the **Manage Permissions** dialog.

Manage Permissions

Find Users

Mary Mergers ✕

View Report

✓

Edit Report

✓

✓ = Allow ✗ = Deny □ = Inherit

add

cancel

Figure 95: Manage Permissions

2. Look up the user to whom you want to grant permissions in the **Find Users** field.

- Click the checkboxes repeatedly to toggle permission settings for viewing and editing reports. The following options can be selected:

-  = **Allow** Allows the user or group to perform an action on the report.
-  = **Deny** Denies the user or group permission to perform an action on the report.
- ☐ = **Inherit** Inherits permission from the capability if permission is not selected for either user or group.

- Click **add** to display the user in the **Permissions** section.
You can edit user permissions, if you have appropriate privileges.
- Click **save** on the **Edit Report** page to save these permissions.

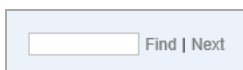
Report Features

The following features are available on a generated Intapp Flow report:

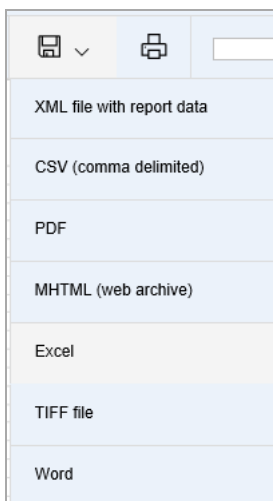
- Page navigation:** If data in a report continues on multiple pages, you can type the page number or use navigation arrows to browse through the report.



- Text search:** You can type specific text to search in the data table. It is a useful feature if the report has a large amount of data.



- Export report:** You can export a report to a variety of file formats.



- Refresh report:** To view updated data in the report, use the **Refresh** icon .

- Print report:** To print your report on a paper, use the **Print** icon  to invoke the print command for the printer.

USER PREFERENCES

This chapter outlines some additional application features that can simplify and enhance user experience. It consists of the following topics:

Search for Requests

Quick Find

Find in Files, Notes and Activities

User Preferences

Grid Customizations

Page Navigation

Search for Requests

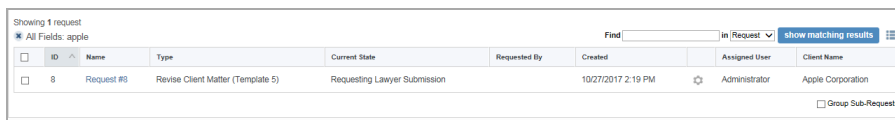
To search for requests or filter records by specific fields, use the Intapp Flow search option.

1. Enter search text in the **Find** search box.
2. Select a particular field to search from the drop-down list, or search all fields by default. Available search categories include:
 - **All Fields:** Enables you to search by any of the fields listed below.
 - **Request:** Enables you to filter by a request ID and name.
 - **Client:** Enables you to filter by a client ID and name.
 - **Matter:** Enables you to filter by a matter ID and matter name.
 - **Party:** Enables you to filter by a party ID and party name.

Note: Your choice of fields to search will be saved and appear selected by default until you change it.

3. Click **show matching results** to search.

The figure below displays a sample result:



The screenshot shows a search interface with a table of results. The table has columns: ID, Name, Type, Current State, Requested By, Created, Assigned User, and Client Name. A single row is displayed with the following data: ID 8, Name Request #8, Type Revise Client Matter (Template 5), Current State Requesting Lawyer Submission, Requested By (empty), Created 10/27/2017 2:19 PM, Assigned User Administrator, and Client Name Apple Corporation. Above the table, there is a search bar with 'Find' and a dropdown menu set to 'Request'. A 'show matching results' button is visible. Below the table, there is a checkbox for 'Group Sub-Requests'.

ID	Name	Type	Current State	Requested By	Created	Assigned User	Client Name
8	Request #8	Revise Client Matter (Template 5)	Requesting Lawyer Submission		10/27/2017 2:19 PM	Administrator	Apple Corporation

Figure 96: Search request

The searched text also appears on the top left corner of the searched list. Click the x to the left of this text display to clear your search and display the entire list.

Find Filters

You can filter your search further by selecting options from the drop-down list to the right of the **Find** search box.



The screenshot shows the same search interface as Figure 96, but with a dropdown menu open next to the 'Find' search box. The dropdown menu lists the following options: Request, Client, Matter, People, and All Fields. The 'All Fields' option is currently selected. The 'show matching results' button is still visible.

Figure 97: Search filters

Available search categories include:

- **All Fields:** Enables you to search by any field, such as Request, Client/Matter, or People.
- **Request:** Enables you to filter by Request ID and name.
- **Client:** Enables you to filter by client ID and client name.
- **Matter:** Enables you to filter by matter ID and matter name.
- **People:** Enables you to filter by user ID and user name.

Quick Find

Intapp Flow enables you to find requests quickly, using a top level find located at the top right hand corner of the page. The application looks up the text that you type in requests, clients, matters, parties, and groups, then displays the top 11 results in the pop-up. Clicking on an entity displays the corresponding page. For example, if you search for **apple** in the top level search, the application displays the clients, matters, parties, groups, form answers, comments, and request custom fields that are related to **apple**. Click a client to view its data management profile page.

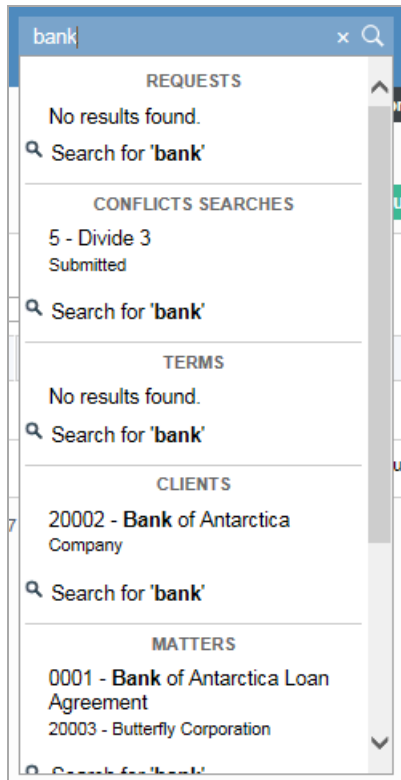


Figure 98: Quick Find

Search is performed on the following system fields for each entity:

Entity	Fields searched
Clients	- Client ID - Client Name - Client - Party Name & ID - Description - Notes
Matters	- Matter Name - Matter ID - Matter - Client Name & ID - Description - Notes
Parties	- Party ID - Party Name - Description - Notes
Groups	- Group Name - Description - Notes

Entity	Fields searched
Requests	- Request Name - Request Id - Comments - Notes - Question Answers: The following answer types are searchable: - Word/Phrase - Multiple Choice - Special answer type (address, parties, grid) - Custom Fields For requests, the above fields are configured in system configuration settings.

Users with view or edit data management permissions can view the client, matter, party, and group sections.

Find in Files, Notes and Activities

To search by specific text within the **Files**, **Notes** and **Activities** tabs, use the search text box.

Figure 99: General search

User Preferences

Out-of-Office Request Delegation

Intapp Flow allows you to designate a user to manage your request tasks while you are out of office, and to set your user status to “Out of Office” for a specified period of time. You can also enable daily digest e-mails rather than receiving notifications individually.

Follow these instructions to change your user preferences to reflect an absence, and to delegate your tasks within the application to another user.

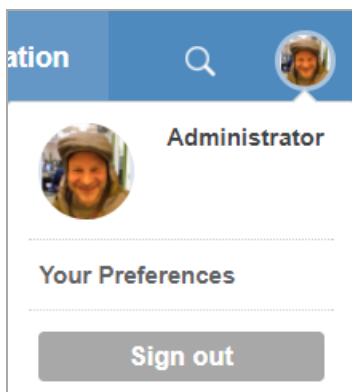


Figure 100: Link to set user preferences

1. Click the drop-down arrow next to your username at the top of the application. Click the **Your Preferences** link to set user preferences.

The screenshot shows the 'Your Preferences' form. At the top, there's a section titled 'Set out of office delegate for Requests:' with a checked checkbox. Below this, there are fields for 'Delegate To:' (a dropdown menu showing 'Allison Aml'), 'Start Date:' (8/24/2017 5:02 PM), and 'End Date:' (9/16/2017 12:00 AM). There's also a 'Forward Notifications:' checkbox which is checked, and a 'Message:' text area. The text area contains the text 'Hi Suzy. More notifications for you! I can't read them while I'm scuba diving! Thanks.' and a character count '86 of 500 characters'. Below the text area, there's a section titled 'Enable Daily Digest Emails:' with a checked checkbox and a 'Time of day:' dropdown menu showing '10:00 AM'. At the bottom right, there are 'save' and 'cancel' buttons.

Figure 101: Out of office delegation preferences

2. Select the **Set out of office delegate for Requests** check-box to set a delegate.
3. In the Out of Office Delegation lightbox, you can set values for the following options:
 - **Delegate To:** Select a user by typing a username into this field. The application will find matching names in the system.
 - **Start Date:** Enter a start date from which all requests will be delegated to the user you selected.
 - **End Date:** Enter an end date for the out-of-office period.
 - **Forward Notification:** When checked, all the request assignment, approval and decline notifications will be forwarded to your delegate. If left unchecked, you will continue to receive the notifications.

The screenshot shows the 'Forward Notifications' section. It has a checked checkbox and a question mark icon. Below it, there's a 'Message:' label and a text area. The text area contains the text 'Hi Suzy. More notifications for you! I can't read them while I'm scuba diving! Thanks.' and a character count '86 of 500 characters'.

Figure 102: Custom message for forwarded notifications

- **Message:** This message will be added to all notifications that are forwarded to the delegated user. Enter no more than 500 characters.
4. Click **save** when you are done.
 5. The dashboard screen will display a banner letting you know that your out-of-office delegation is enabled.

The screenshot shows a yellow notification banner with the text 'Out of office delegation is enabled' and a close button (X) on the right.

Figure 103: Out of office enabled notification banner

If you are a secretary needing to set an out-of-office delegation for a lawyer, your administrator must grant you permission to use this delegation process. The process for secretaries is the same, with one additional step: you must first select a user in the **Set Out of Office delegation for** drop-down list of users. Once you have selected a lawyer (or yourself) from the list, follow the instructions above.

Figure 104: Out of office delegation by secretary

To enable daily digest e-mails for the user, check the box and use the sliders to enter a time of day when the e-mails should be sent. The time of day is specific to the user's time zone.

Grid Customizations

You can make the following changes to the appearance of grid type questions.

Hide Data Entry Areas

To display the grid only and not the data entry area of a grid type question, click the **hide** link as displayed in the following figure:

First Question	Second Question
Ethics Department code	4
Finance Department code	12
Service Unit	10
Health Department code	2
Education Department code	5

Figure 105: Hide data entry

The data entry area collapses and the section just displays the grid. To bring the data entry area back, click the **add** link.

First Column	Second Column
How many cases are there?	3
How many cases are closed?	1

Figure 106: Add data entry

To collapse the entire question, click the inverted triangle next to the question name.

Re-arrange Rows

You can change the order of the records displayed in the grid by dragging and dropping the rows within the grid. This is also effective if you want to change the hierarchical order of a grid with enabled hierarchy.

To move a row, click and drag the row and place it where you want it to show. For hierarchies, if you want to move a row to be a sub-row, you can drop it over that row. You can also drop the row above or below a row to display it in that order.

First Column	Second Column	
Ethics Department code	4	+ / x
Finance Department code	8	+ / x
Service Unit	10	+ / x
Health Department code	2	+ / x
Education Department code	5	+ / x

Figure 107: Re-arrange rows

If the number of hierarchies exceeds the limit defined in Form Designer, the application prompts a message as below:

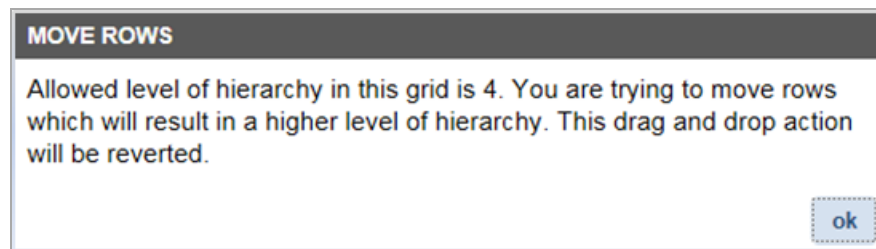


Figure 108: Exceeding hierarchy limit

When you remove a row that has sub-rows, the application prompts that the sub-rows will also be removed with the parent row. At this point you can remove the row or keep it.

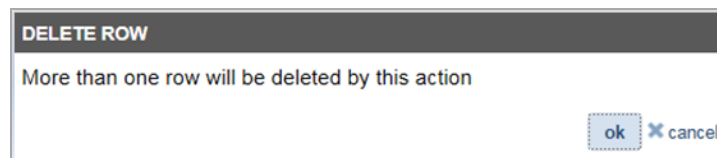


Figure 109: Prompt on deleting a parent row

Sort Columns

You can sort all application grids by their columns. Click a column head to sort the record information based on that column. For example, click the **Request Name** column to sort the records by request names in alphabetically ascending or descending order.

Showing 8 requests								Find	in Request	show matching results
	ID	Name	Type	Current State	Requested By	Created	Assigned User	Client Name		
☐	1	Request #1	New Client / New Matter (Template 1)	Complete Request Form		10/26/2017 8:52 AM	Administrator			
☐	2	Request #2	Revise Client Matter (Template 5)	Requesting Lawyer Submission		10/27/2017 12:29 PM	view people			
☐	3	Request #3	New Client / New Matter (Template 1)	Complete Request Form		10/27/2017 2:19 PM	Administrator			
☐	4	Request #4	New Client / New Matter (Template 2)	Fill Out Request		10/27/2017 2:19 PM				

Figure 110: Sort columns

Page Navigation

Page navigation is useful to prevent the display of too many records on a single page.

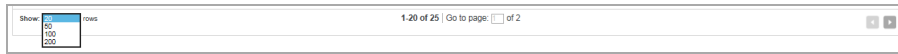


Figure 111: Page navigation

- To view a specific number of records per page, select a number from the drop-down at bottom left.
- Enter a page number in the text box (bottom center) to access a specific page.
- Click the arrow buttons at the bottom right to navigate between pages.

GLOSSARY

M

MyTerm	Definition
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INDEX

A

Acting on a Request 25
Ad Hoc Workflow 39
Approve and Decline a Request 28

C

Cancel a Request 34
Cancel a Request with Sub-Requests 39
Claim and Release a Request 34
Clone a Request 32
Convert a Request 33

D

Dashboard 10
Delegate a Request 28
Delete a Request 34

F

Filter Requests 14
form 7
form designer 20

G

Grid Display 14

P

Parallel Workflow 39

R

Request 7
Request Category 7
Request Completion Time Series Report 65
Request Duration Report 62
Request on Hold 31
Request Progress 40
Request State 7
Request Summary Report 58
Request Type 7

S

Search Feature 83
Search Filters 83
Share a Request 29

W

workflow 7
Workflow 7