Outline:

\*\*Course Title: Leveraging Intapp Time Narrative Features for Efficient Time Entry\*\*

\*\*Course Duration: 4 Hours\*\*

\*\*Target Audience:\*\*

- New users of Intapp Time

- Existing users who want to improve efficiency in narrative entry

- Administrative staff responsible for managing narrative codes and shortcuts

\*\*Learning Objectives:\*\*

By the end of this training, participants will be able to:

1. Enter descriptive text using the Narrative field within an Intapp Time Entry Form effectively.

2. Utilize various methods to populate the Narrative field, including right-click options and keyboard shortcuts.

3. Apply narrative codes such as personal public codes, private codes, and firm-wide codes to streamline entry processes.

4. Utilize shorthand codes and narrative pause codes to quickly expand common phrases and insert templated text in narratives.

5. Manage personal narrative codes by adding new codes, editing existing ones, and setting codes as public or private.

6. Leverage the narrative pause function to create dynamic prompts that facilitate detailed time entry descriptions.

7. Conduct efficient text searches and replacements within the Narrative field to correct or update entries.

8. Export and import narrative codes to and from text files for backup and cross-user functionality.

9. Troubleshoot common issues and mistakes when utilizing narrative functions in Intapp Time.

10. Implement best practices for narrative entry to maximize the productivity and accuracy of time recording.

\*\*Class Structure:\*\*

\*\*I. Introduction\*\*

- Overview of Intapp Time

- Importance of accurate and efficient narrative entries

\*\*II. Essential Features of The Narrative Field\*\*

- Introduction to the narrative field and entry form

- Discussing word wrap, automatic spell checking, and keystrokes

\*\*III. Populating the Narrative Field\*\*

- Right-click menu options

- Keyboard shortcuts for editing and navigating

- Exploring Narrative field toolbar options

\*\*IV. Narrative Codes\*\*

- Understanding narrative codes and their use

- Viewing narrative codes

- Filtering and sorting narrative codes

\*\*V. Shorthand Codes and Narrative Pause Codes\*\*

- Creating and using shorthand codes for efficiency

- Implementing narrative pause codes for dynamic text entry

\*\*VI. Managing Personal Narrative Codes\*\*

- Creating personal narrative codes

- Public vs. private codes

- Editing and deleting narrative codes

\*\*VII. Advanced Narrative Features\*\*

- Embedding narrative pause codes within shorthand codes

- Productivity techniques with narrative pause codes

\*\*VIII. Text Search and Replacement\*\*

- Utilizing the find and replace feature for narratives

- Searching the narrative codes list

\*\*IX. Importing and Exporting Narrative Codes\*\*

- Step-by-step guide to exporting narrative codes

- Procedures for importing narrative codes and handling duplicates

\*\*X. Practical Application and Troubleshooting\*\*

- Hands-on activities to apply learned features

- Common troubleshooting scenarios and solutions

\*\*XI. Best Practices and Q&A\*\*

- Discussing best practices for efficient narrative entry

- Open Q&A session for any unresolved queries and tips

\*\*XII. Conclusion and Assessment\*\*

- Summary of the main points

- Formal assessment to evaluate the participant’s understanding

- Certificates of completion (if applicable)

\*\*XIII. Supplementary Materials\*\*

- Access to the Intapp Time Desktop User Guide

- Quick reference guides for narrative features, shortcuts, and codes

- Contact information for ongoing support and questions

\*\*Teaching Methods:\*\*

- Instructor-led presentations

- Demonstrations of Intapp Time software

- Interactive hands-on activities and exercises

- Real-case scenarios and examples

- Q&A sessions