

HOW TO CREATE AND MANAGE UNDERTAKINGS ON ALB

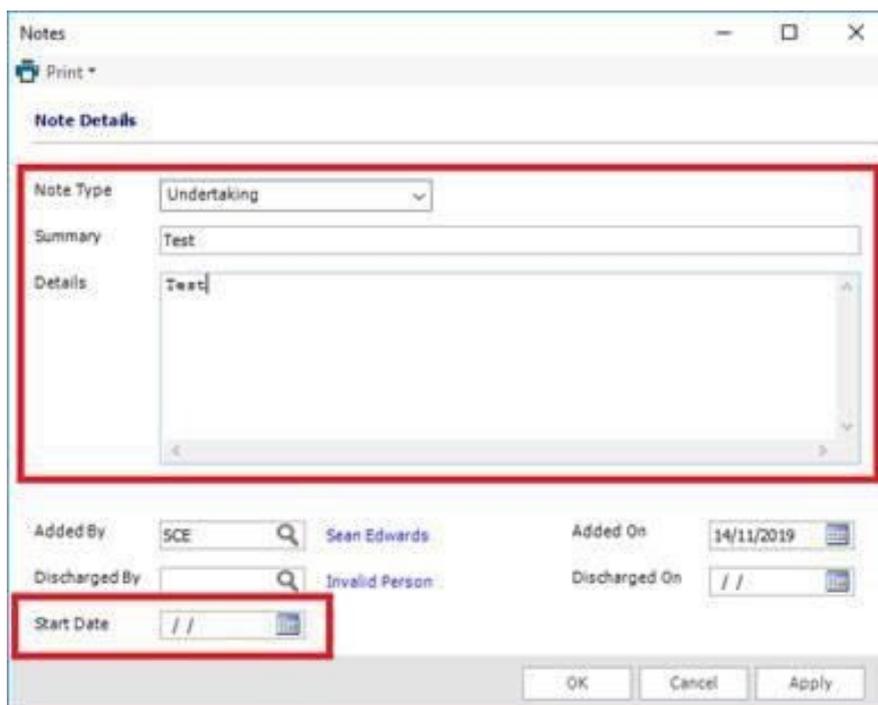
If you want to create the record of an undertaking on a matter, please follow the steps in this document:

HOW TO CREATE AN UNDERTAKING RECORD

1. On the relevant matter, select the Notes tab and create a New Note:

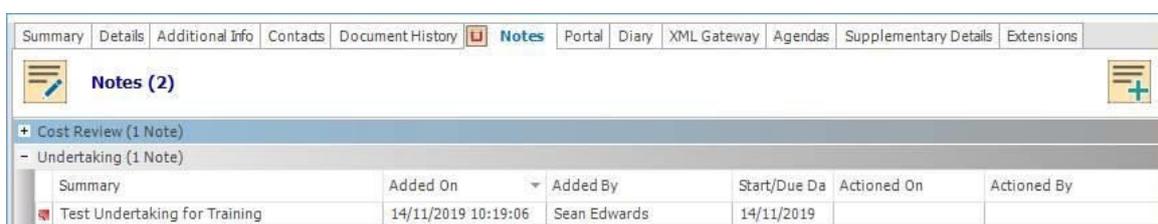


2. On the new Note screen, select the Note Type to be Undertaking and enter details against the:
 - Summary
 - Details box
 - Set a Start Date



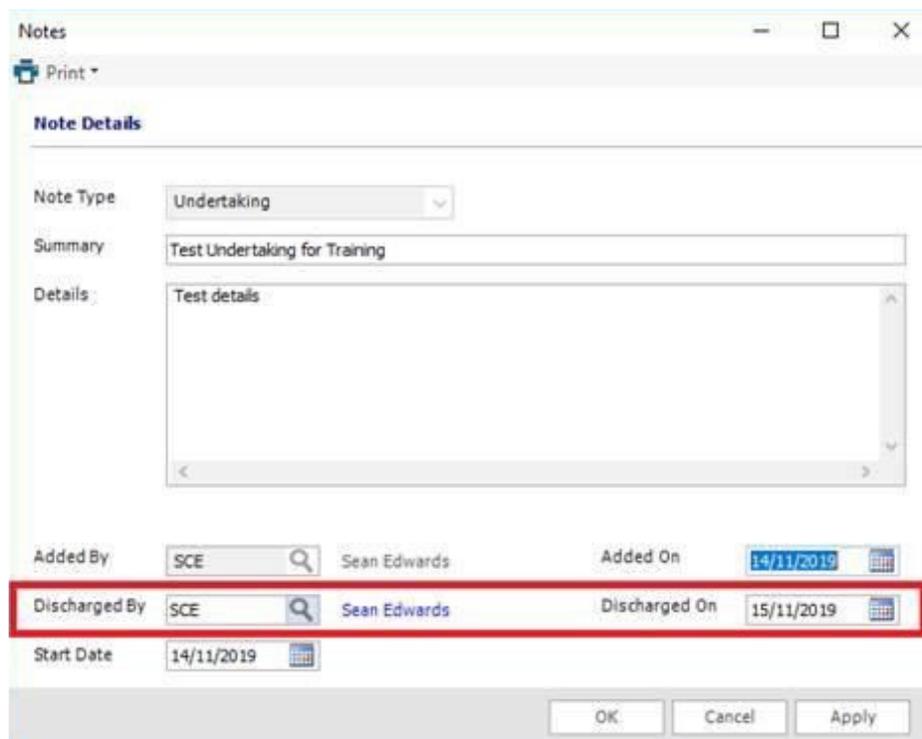
3. Hit Ok to save this record.

Once set, you'll see that the Notes tab gets a new 'U' icon to signify that there's an undertaking stored on the file:



HOW TO DISCHARGE AN UNDERTAKING RECORD

The Undertaking record will prevent the matter from being archived as it will appear as a check against the **Mark for Archiving** process. The record has to be discharged to pass this check. This can be done by double clicking back into the record and setting a date and name against the record as so:



The screenshot shows a 'Notes' window with the following details:

- Note Type:** Undertaking
- Summary:** Test Undertaking for Training
- Details:** Test details
- Added By:** SCE (Sean Edwards)
- Added On:** 14/11/2019
- Discharged By:** SCE (Sean Edwards) - This row is highlighted with a red box.
- Discharged On:** 15/11/2019 - This row is highlighted with a red box.
- Start Date:** 14/11/2019

Buttons at the bottom: OK, Cancel, Apply.

GLAISYERS
ETL
GLOBAL

Manchester Office:
3 Hardman Street
Manchester M3 3HF
T: 0161 832 4666

Liverpool Office:
The Plaza
100 Old Hall St
Liverpool L3 9QJ
T: 0151 332 3555

hello@glaisyers.com
www.glaisyers.com