

## 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:

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## HOW TO CREATE AN UNDERTAKING RECORD

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

Ref: 0 Desc: 8 Client: 8	99094 <b>Q</b> - 0020 Bishops Land Ringn Broadoak Private Fi	Q O d	at Diplocks Ind	Estate, Bis	hops Lane,	Ri		2	67	<u> </u>
Summary	Details Additional I	fo Contads	Document Histor	Notes	ortal Dia	ry XML Gateway	Agendas	Supplementary Details	Extensions	

- 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

lotes					- 0	>			
Print *									
Note Details									
Note Type	Undertakin	٥	~						
Summary	Test								
Details	Test					1			
_	4					2			
Added By	SCE	٩	Sean Edwards	Added On	14/11/2019				
Discharged By	1	Q	Invalid Person	Discharged On	11				
Start Date	11								
			-	OK CH	vel A	- h			

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:

Summary	Details Additional	Info Contacts	Document History	U	Notes	Portal	Diary	XML Gateway	Agendas	Supplementary Details	Extensions	
=	Notes (2)											=
+ Cost Re	view (1 Note)											
- Underta	aking (1 Note)											
Sum	mary		Added On		Ŧ	Added B	У	Star	t/Due Da	Actioned On	Actioned By	
🦪 Test	Undertaking for Tra	ining	14/11/201	9 10:1	9:06	Sean Ed	wards	14/	11/2019			

## 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:

otes					- 0	>			
Print -									
Note Details									
Note Type	Undertaking	í.	2						
Summary	Test Undertaking for Training								
Details	Test details					~			
	<					>			
Added By	SCE	Q	Sean Edwards	Added On	14/11/2019				
Discharged By	SCE	٩	Sean Edwards	Discharged On	15/11/2019				
Start Date	14/11/2019								
				OK Can	cel Ap	ply			

