



Release Notes

1.45 Release

Introduction	2
Installation	2
New Features and Functions	3
Flagging Notes and Undertakings	3
Archive Number in Case Enquiry	5
Archive Number in Print Matter Report	5



Introduction

This document explains the changes you will see in the updated version of Insight, along with a brief explanation of the new functions. Training is always recommended to fully understand and make the most of the new functions. Online training is available for just £90.00 for the first delegate and then £45 for any additional delegates plus VAT. Training can be booked by contacting Insight Legal on 01252 518939 option 2.

Installation

Insight will update after your specified upgrade time slot when logging in.

The first time the new update is run, the database will be updated, which may take a few minutes. You must let the update run through uninterrupted, so please give it the time it needs without cancelling the update or running Insight again.

If there are any errors reported during the upgrade process, this will likely be due to your virus checking software interrupting the update. If this occurs, you may find it easiest to temporarily disable your virus protection software and start the upgrade again by restarting Insight, but please check with your IT Company/Department if you have any concerns about doing this.

If any problems are encountered during the update process, please restart Insight, and it will attempt to re-run the update and correct any issues. If you are still having problems with the update after restarting, please get in touch with Insight Legal support at 01252 518939.

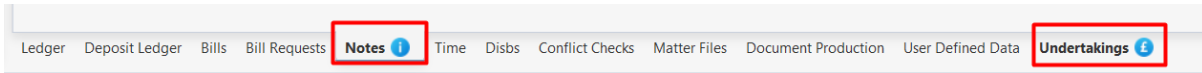
All users must update the program, so it may be beneficial to check that all of your colleagues have closed and reopened Insight after you have upgraded your version.



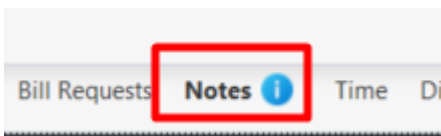
New Features and Functions

Flagging Notes and Undertakings

Critical Notes and Active Undertakings will now be flagged in the Case Enquiry Screen when a Matter is selected.



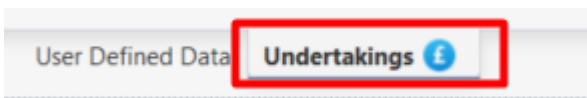
An Icon will be shown on the Notes Tab if a Note has been marked as Critical.



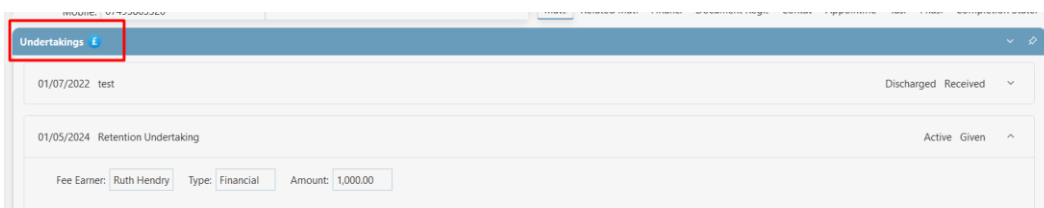
The Header of the Notes window will also be shown in bold text and an icon will also appear to the right of the Header text. The icons will appear for both critical Matter Notes and critical Client Notes



An Icon will be shown on the Undertaking Tab if there is an Active Undertaking.

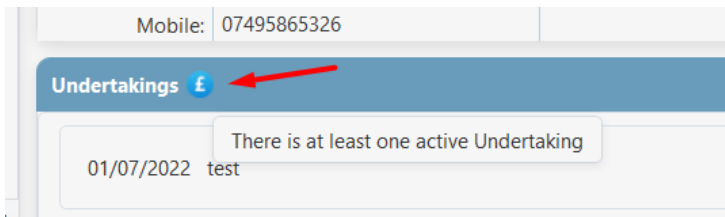
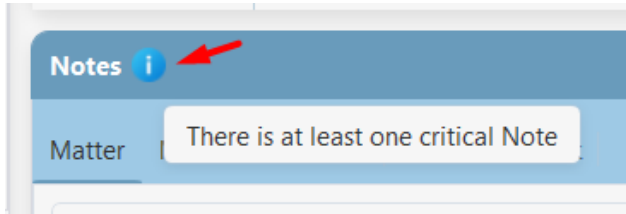


The Header of the Undertakings window will also be shown in bold text and an icon will also appear to the right of the Header text.

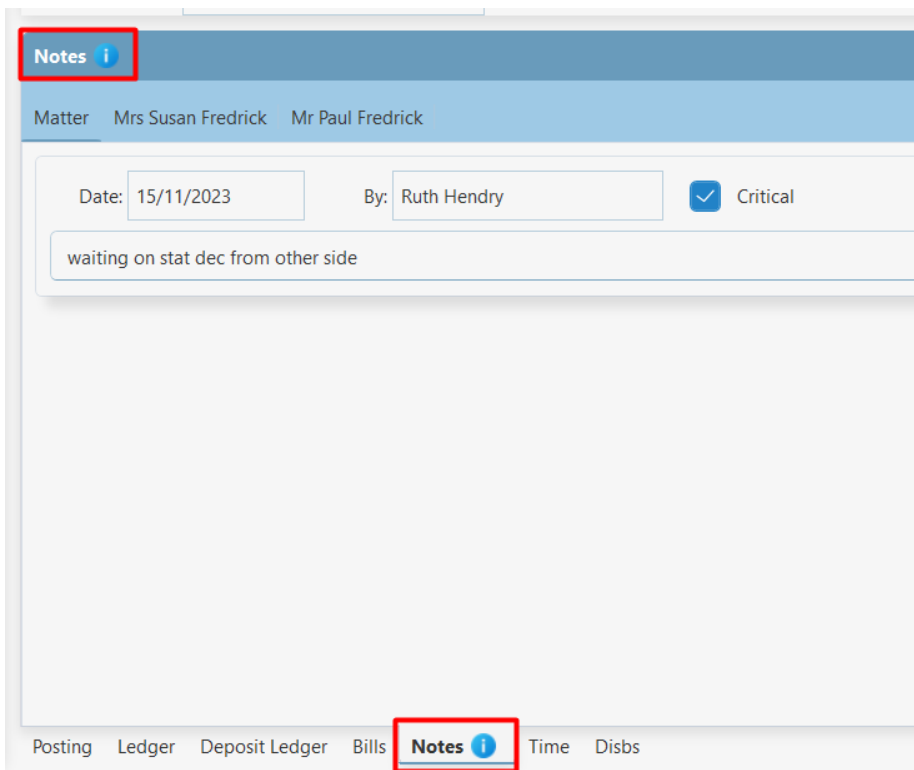




When hovering over the header icon in both windows a pop up will appear to explain to the user why the tab has been flagged



Critical Notes will also be flagged on the Matter Posting Screen for Accounts users. This means any notes that have been added and marked as Critical in Case Enquiry will also be highlighted in the Accounts Matter Posting Screen





Archive Number in Case Enquiry

The Archive Number Field available in Matter Maintenance is now available to view in the Case Enquiry Screen. This will now allow users to view the Archive Number without having to navigate to the Matter Maintenance Screen.

The Location field has also been renamed as 'Archive Location'.

The Archive Number and Archive Location fields can be found in the same area of the Matter tab in Case Enquiry making this easier for the user to navigate.

Matter: Trust for Abby Fredrick

Reference: T&E1

Branch: Main Branch

Type: Trust

Opened: 27/04/2022

Archived:

Charge Rate:

Alternate Ref:

Department: Trust & Estates

Risk:

Closed: 03/08/2023

Archive Location: Box 10

Archive Number: 1003

Matter | Related Matters | Financial | Document Registers | Contacts | Appointments | Tasks | Phases | Completion Statement

Archive Number in Print Matter Report

In addition to adding the Archive Number field to the Case Enquiry Screen, this field has also been added to the Matter Details on the Print Matter Report.

INSIGHT LEGAL		Case Details	
A Dye & Durham Solution		From: 01/01/1990 To: 07/05/2024	
		Status - All.	
FRE3 - Abby Fredrick	T&E1	Trust for Abby Fredrick	Closed: 03/08/2023
Matter Details			
Matter:	T&E1	Trust for Abby Fredrick	Closed
Alt Ref:		Branch: A - Main Branch	Opened: 27/04/2022
Department:	T&E - Trust & Estates	Type: TRU - Trust	Closed: 03/08/2023
Risk:		Charge Rate:	Archive Number: 1003
Costs Quote:			Archive Location: Box 10
Billed Costs:	3,850.00	Total Disbs:	Office:
Total Bills:	4,602.00	Unbilled Disbs:	Client:
Estimated Bill Date:		Last Bill:	Deposit:
Office Bank:	O1 - Office Bank 1		WIP:
Client Bank:	C1 - Client Bank 1		Total Time:
Deposit Bank:			Last Time:
Fee Earner Responsible:		KM - Kev McMaster	

As in Case Enquiry the Location field has been renamed to 'Archive Location' and both fields can be found in the same area of the report.