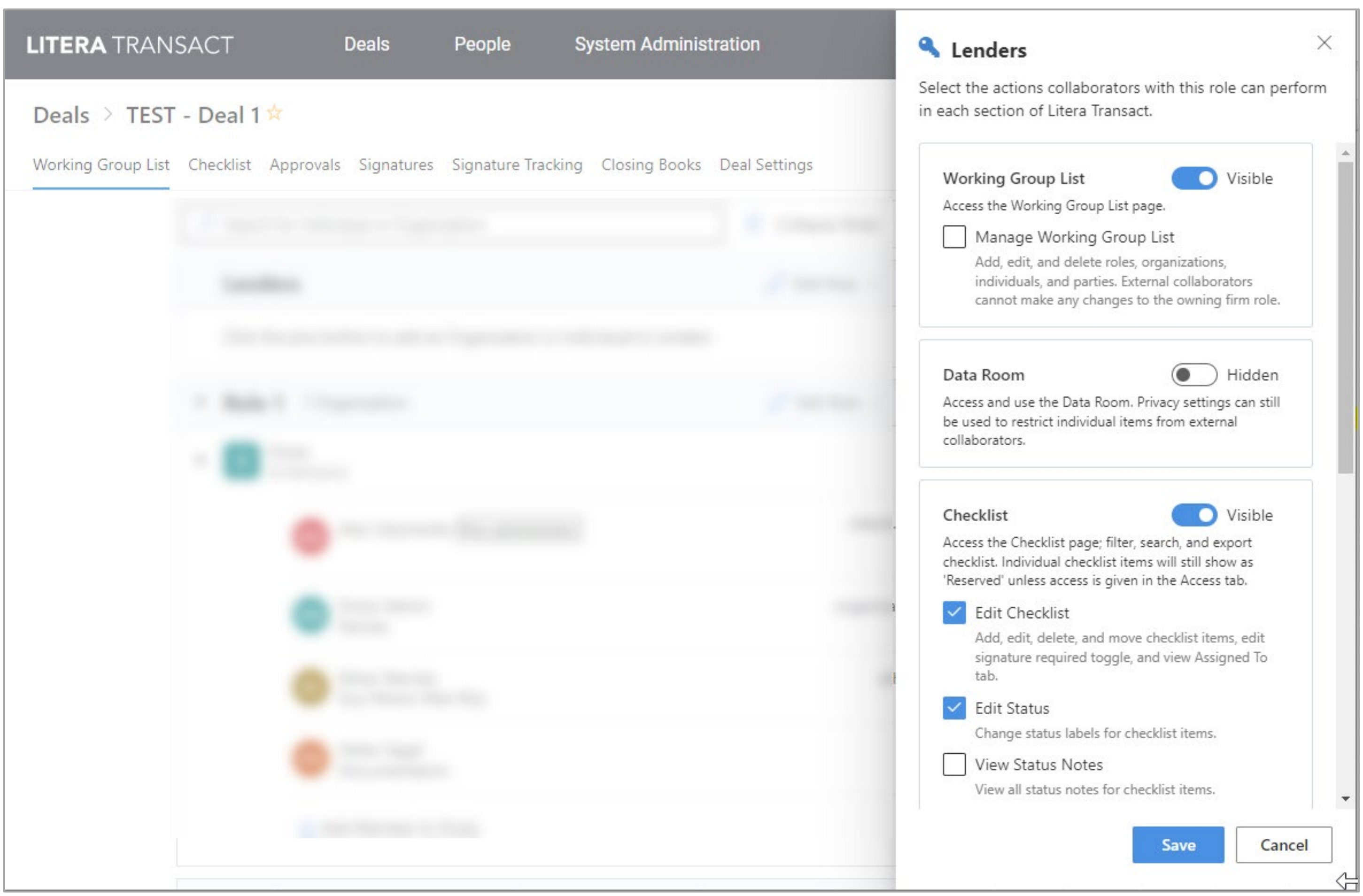
Enhancements

Configure permissions for external collaborators

Currently, external collaborators (users outside the owning law firm) are automatically assigned limited permissions that cannot be configured. This has hindered certain workflows, such as when an owning firm users at a partner firm to have wider access and edit rights in Litera Transact. Additionally, owning firms sometimes want external collaborators to have even fewer permissions than are automatically given. Furthermore, although in some deals owning firms may want external collaborators to have limited permissions, in other deals they may want those same firms to have extended permissions.

To meet these different requirements, the latest release of Litera Transact enables the owning firm to configure permissions for external collaborators on a deal-by-deal basis. Owning firm users (with a System Admin, Firm Admin or Standard User role) configure external collaborator permissions for roles by clicking **Permissions** in the **Working Group List** page.

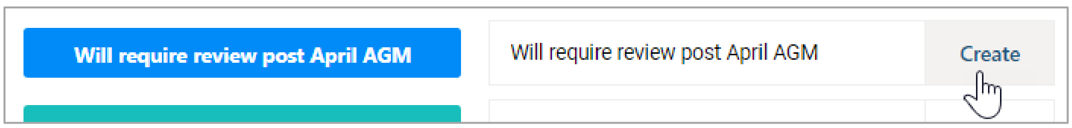


Owning firm users can allow or deny access to all areas of Litera Transact on a deal-by-deal basis. In addition, they can set more granular permissions for the working group list and checklist. For example, enable external collaborators to view and edit status notes or restrict external collaborators from uploading documents to the checklist.

Note: Owning firm users will still need to give external collaborators access to checklist items and data room items.

Longer status labels

Customized status labels are added to deal items to help all participants quickly understand the stage the item is at in the process. For added flexibility and convenience, users can now use up to 38 characters when creating status labels in Deal Settings.



Improved closing book user experience

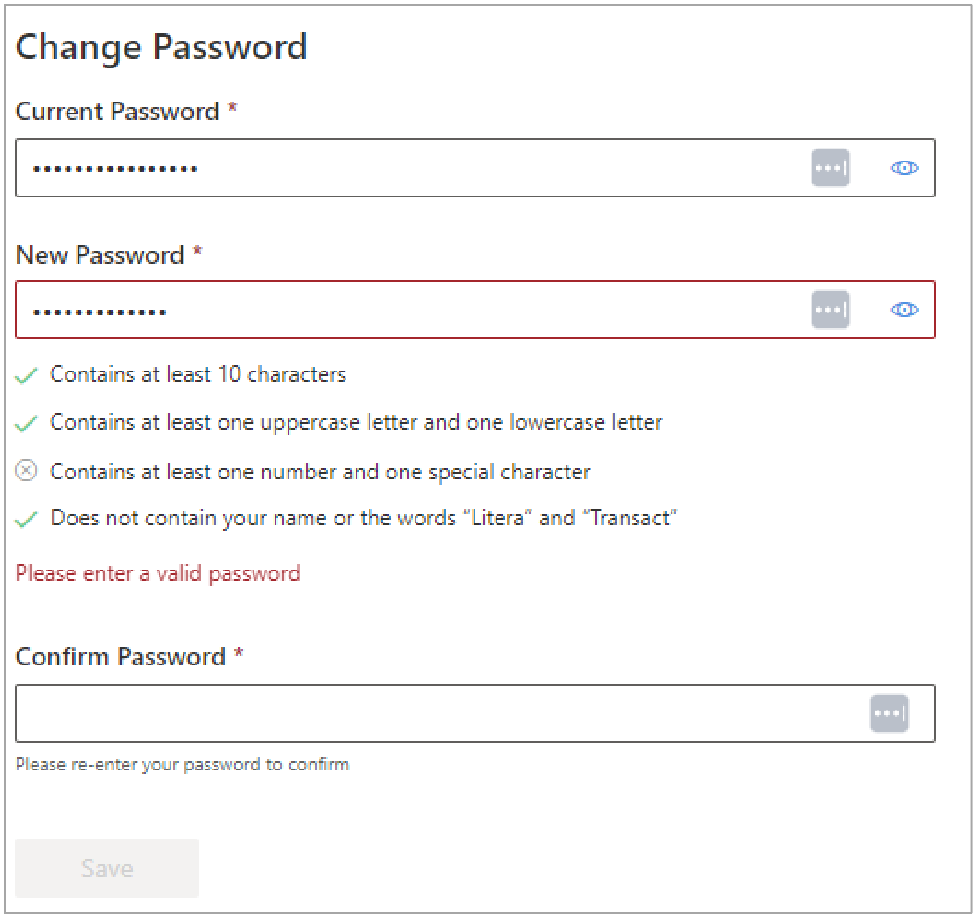
We've made the following user experience improvements to closing books:

- Previously, when users clicked **Download** to download a closing book, it wasn't always clear that the download was happening in the background, and users sometimes clicked **Download** repeatedly causing multiple download requests. Now the user experience is more informative and the **Download** button is disabled after click for a short while.
- A checklist item that had related documents with the same name could cause issues when creating closing books. Now related documents for a checklist item must have unique names, and users are informed if they try to upload a related document to a checklist item that already has a related document with the same name.

  Note: Users can upload related documents with the same name to **other** checklist items.

Enhanced password options

To enhance security, we've expanded our password rules. Now passwords may not include the words "Litera", "Transact" or the users name. The rules are shown below the password fields.



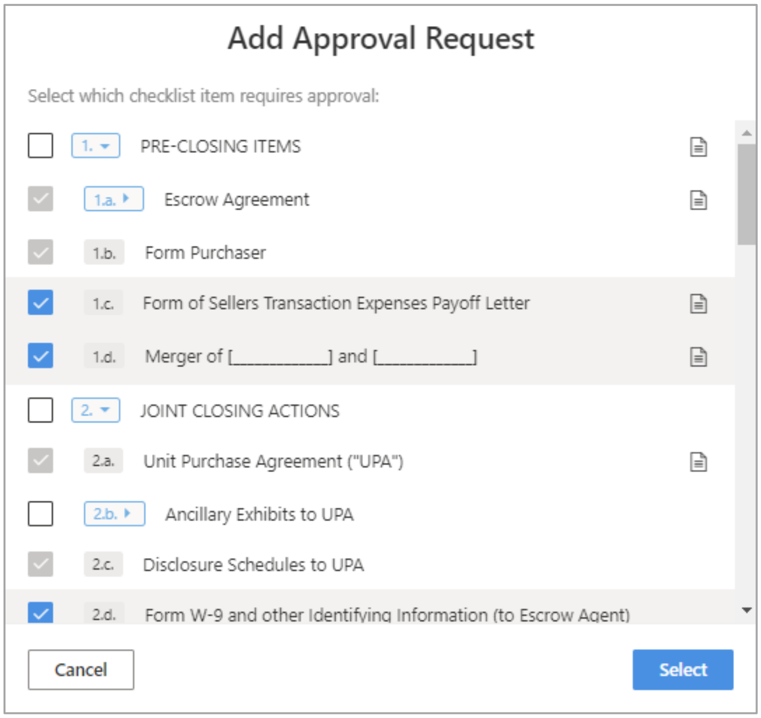
Users can easily see if their password meets the requirements and if not, what they need to change.

Enhanced approvals functionality

This release includes enhancements to the approvals functionality as follows:

Create multiple approval requests at one time

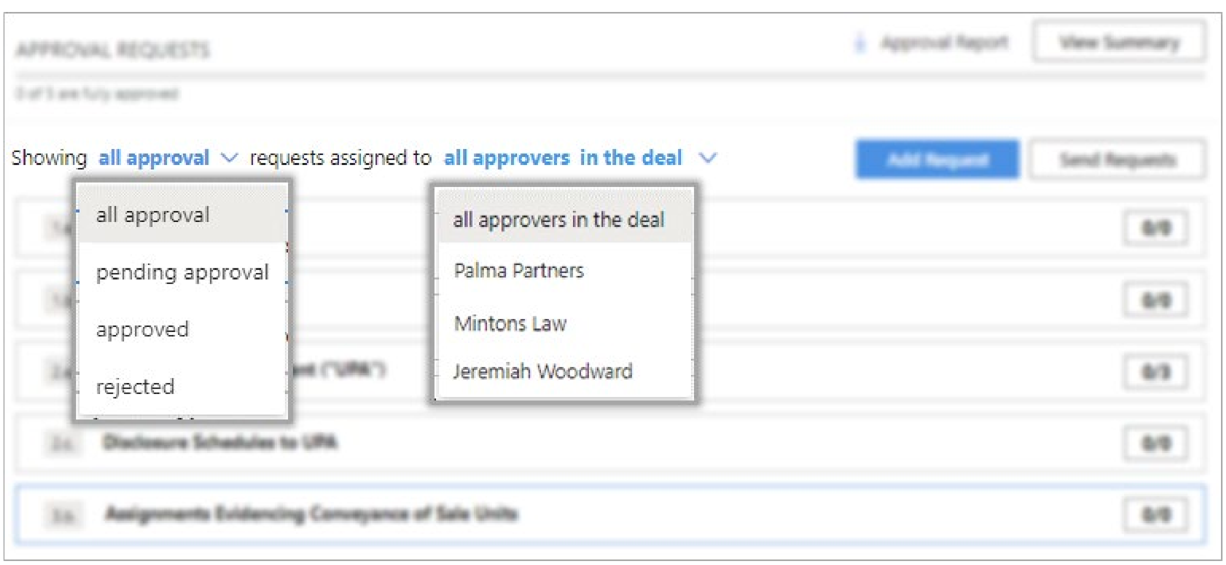
For greater efficiency, users can now create multiple approval requests at one time.



Users can select up to 150 checklist items at one time and approval requests will be created for each one.

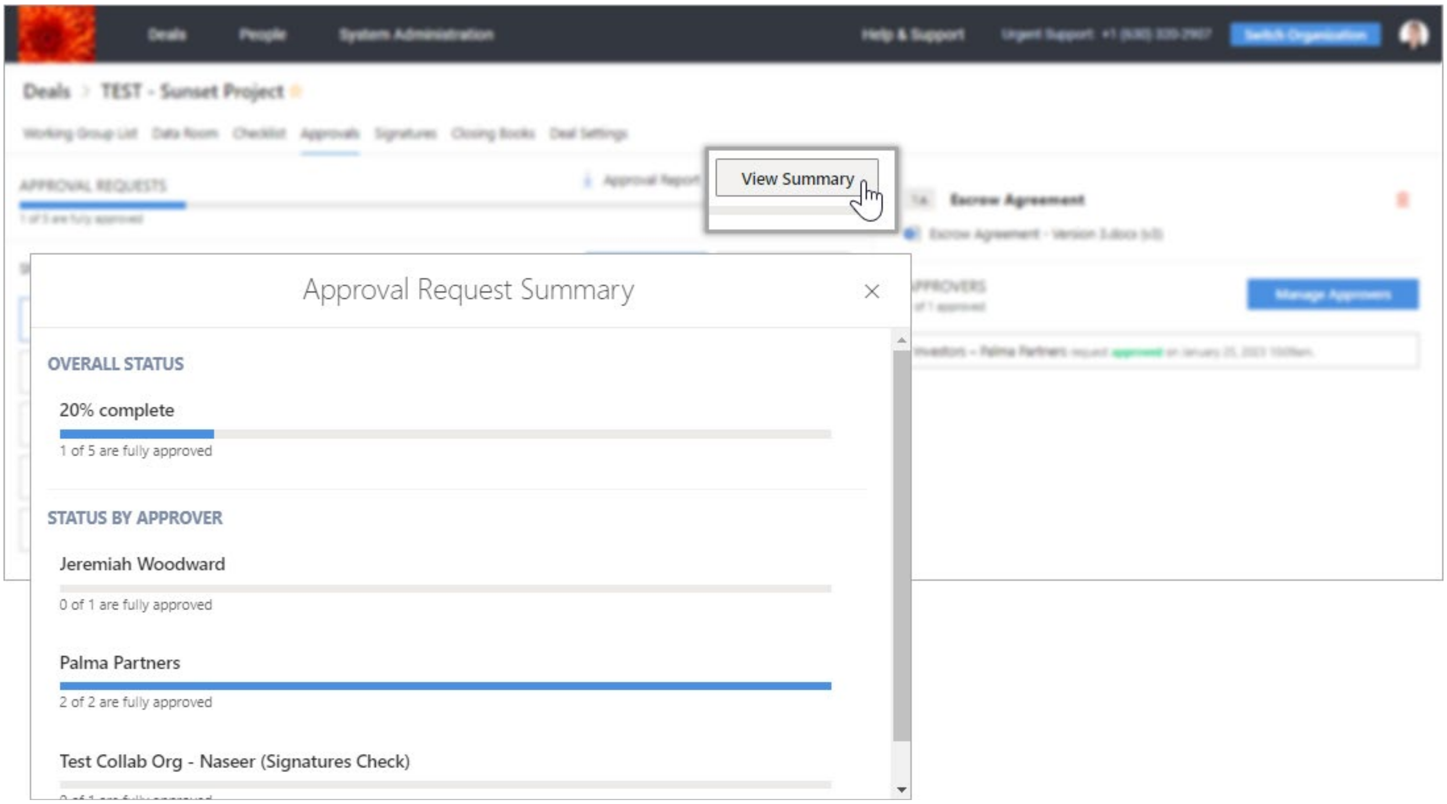
Add filter to approvals list

To more easily navigate through approval requests, users can now filter the list of approval requests by approval status and approver.



New approval status summary

To provide an easy-access status of the approvals process, users can now click **View Summary** to see how near completion the overall approvals process is as well as how many approval requests have been approved by each approver.



Improvements in the Mercury compliance workflow

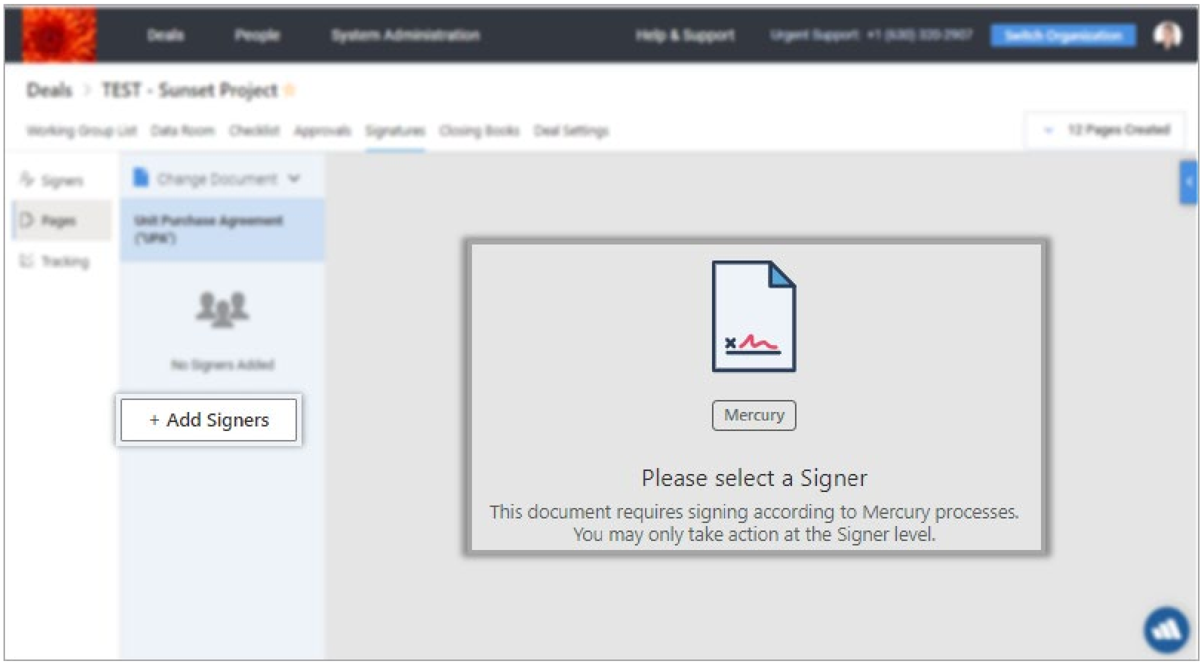
Litera Transact includes a workflow to support the Mercury signing processes in the UK, where the requirement is to send full versions of final documents together with the signature pack. To streamline that workflow and make it as useful as we can, you'll see a couple of updates in this release:

Support for electronic signatures

Previously, Litera Transact's Mercury workflow only allowed manual signatures. Users can now send a Mercury compliant signature packet from Litera Transact to DocuSign and the entire document – not just the signature page – will be sent.

Helpful guidance for users

When a document is marked as the execution version, users can only set up signature pages at a signer level and the UI now clearly indicates this.



Issues Fixed

- When users selected to create a single PDF closing book with Calibri or Cambria as the font type in the index, the closing book was not created. This issue has been fixed and closing books are created successfully whatever the font type selected for the index.
- When address details were included in the signature block, the address displayed differently on the editing canvas and the preview. This issue has been fixed and the address now displays consistently on the editing canvas, the preview of the signature page, and in the sent signature page.
- Various performance and stability improvements.