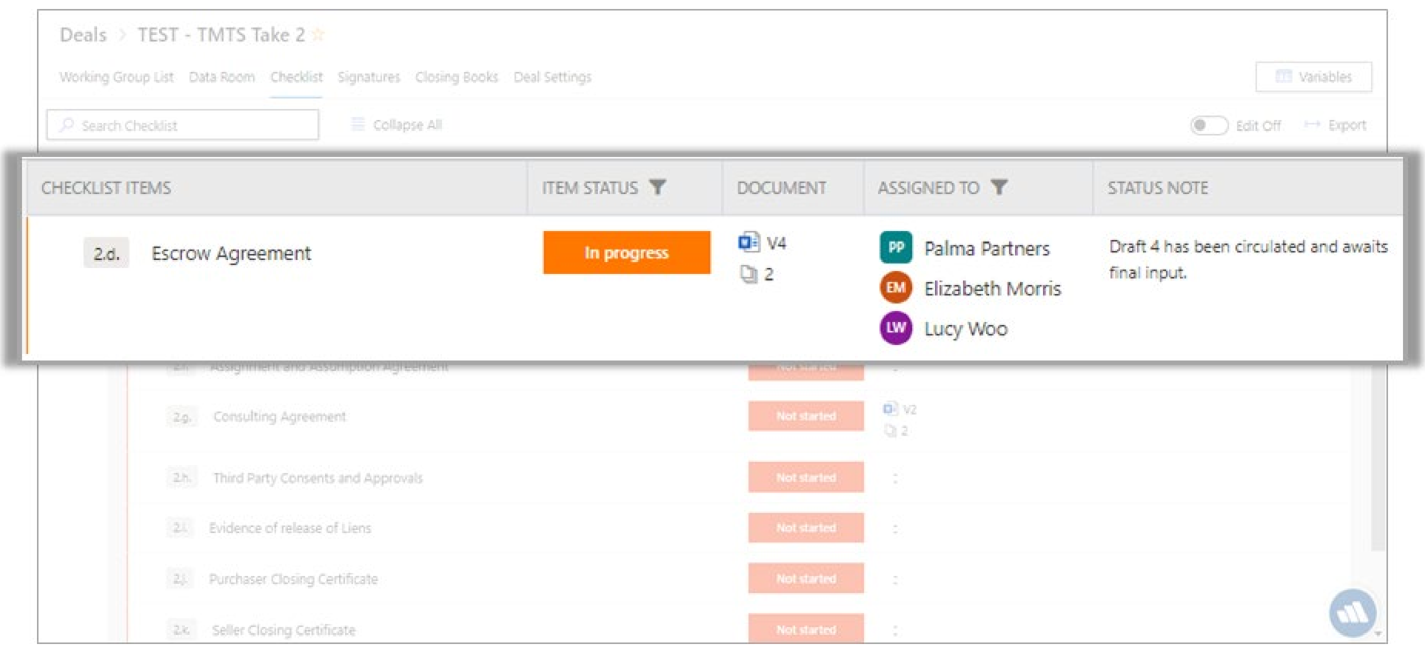
Enhancements

Checklist enhancements

To make important information easily accessible, without the need to open individual checklist items, we've made the following enhancements to the checklist:

- Previously, when an item was assigned to multiple people, users would see "multiple" in the **Assigned To** column and would need to hover to get information on who was assigned to the item. Now users can see all assignees in the **Assigned To** column without the need for clicking.
- The entire latest status note is shown in the **Status Note** column. Previously, the status note was truncated and users would have to open the document details panel to see it in full.
- All checklist cell content is left-aligned for consistency and visual ease.
- For convenience and ease-of-use, the state of the left navigation panel (collapsed or expanded) is remembered when returning to the checklist.

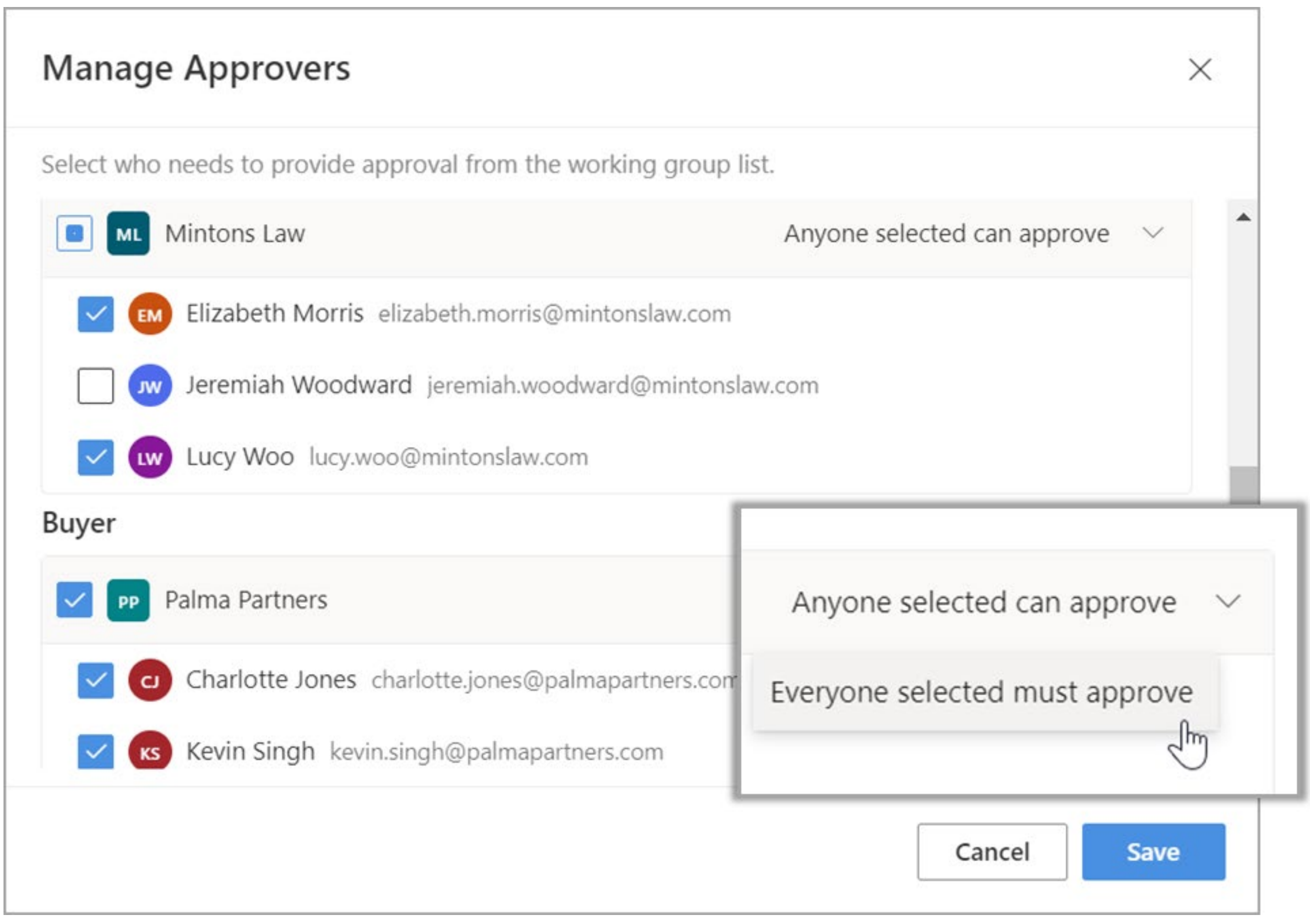


Allow approval by all or any of a selected group

Currently, only organizations are selected as approvers and anyone from each selected organization approves on behalf of the organization.

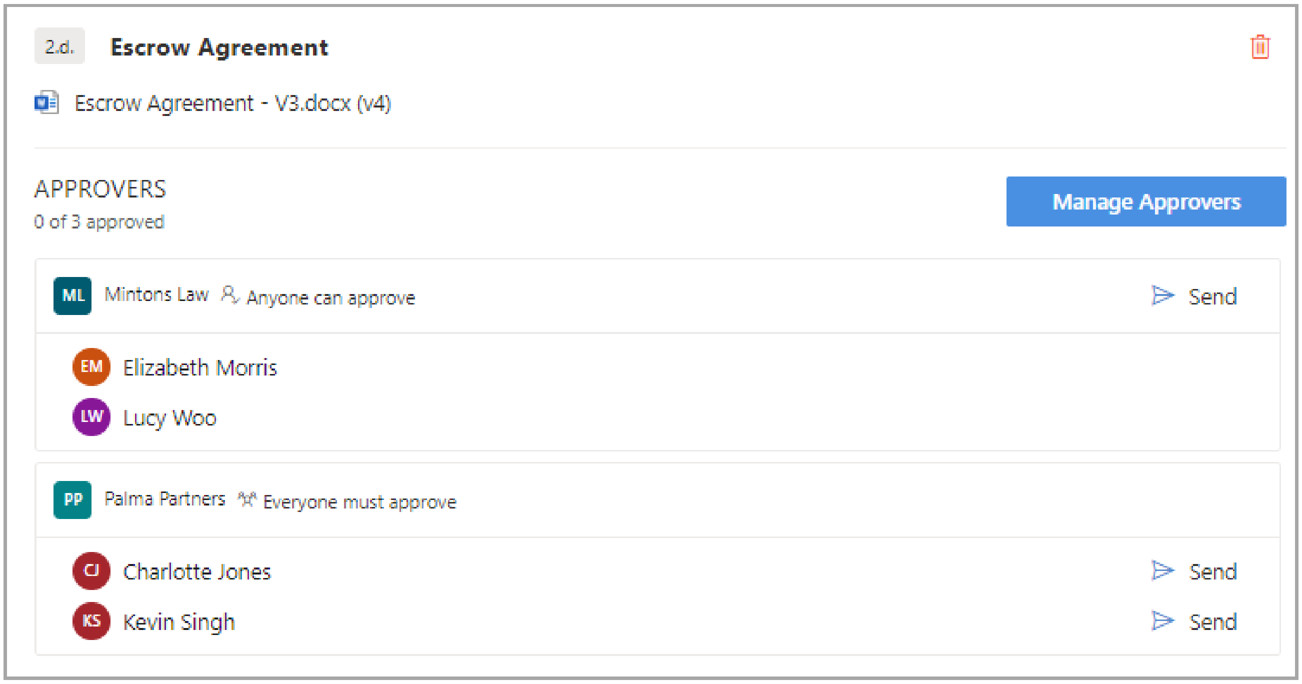
Some firms want to be able to indicate specific individuals in an organization who have authority to sign on behalf of the organization, therefore with this release, users can select an organization or an individual member of an organization to serve as an approver.

Additionally, sometimes it is enough that **any** of the selected approvers approve an item, and on other occasions, firms require **all** selected approvers to give their approval to an item. So when choosing individuals from an organization as approvers, users also specify whether anyone selected can approve or whether everyone selected must approve.



- When **Anyone selected can approve** is selected, an approval request is created for the organization with the approvers shown below. As soon as one approver has approved, or rejected, the request, the process is complete.

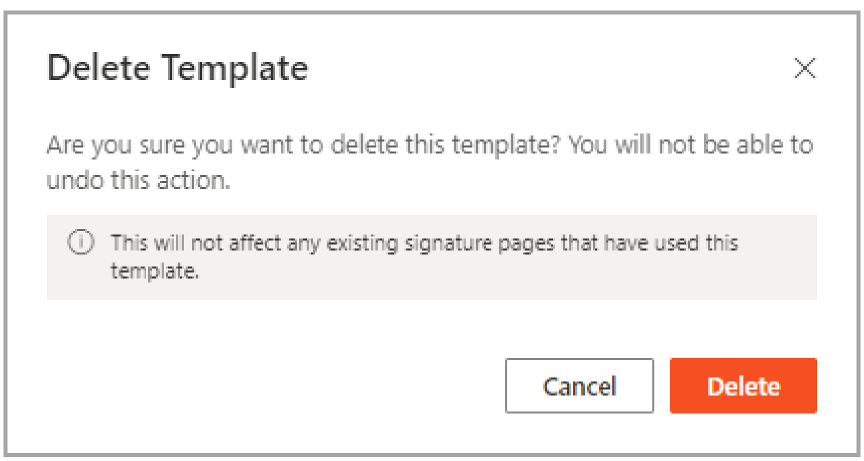
- When **Everyone selected must approve** is selected, an approval request is created for each individual approver and the process is only complete when all approvers have approved, or rejected, the request.



After this release, existing pending approval requests in Litera Transact will be converted to requests where anyone can approve, like **Mintons Law** in the above screen.

Improved delete template flow

Delete actions may have significant consequences so it is common practice to ask users to confirm a deletion. Previously, signature page templates could be deleted (by template creators, system admins and firm admins) without a confirmation. This release, to make sure users intended to perform the delete action, we've introduced a confirmation dialog where users confirm the template deletion.



Improvement of scalability and stability of platform

Some deals include huge numbers of files and produce very large closing books. Previously, the download of really large closing books could time-out during the process and the only way to access them was through Customer Support. To prevent this inconvenience for users, we've improved the way we download large files and stopped them timing out.

Issues Fixed

- Some organizations and users were not fully shown on the **Access** tab. This issue has been fixed and the **Access** tab lists all roles, organizations, and users added to the working group list.
- When inserting a name and title into a signature page, an extra space was added between the name and the comma in the generated signature page, for example, **Elizabeth Morris , Attorney**. This issue has been fixed and the name and title display correctly in the signature page, for example, **Elizabeth Morris, Attorney**.
- In a specific deal, the deal export was not completing and the user was unable to request another deal export. This issue has been fixed and the deal files export successfully.
- Various performance and stability improvements.