

## Enhancements

### Checklist enhancements

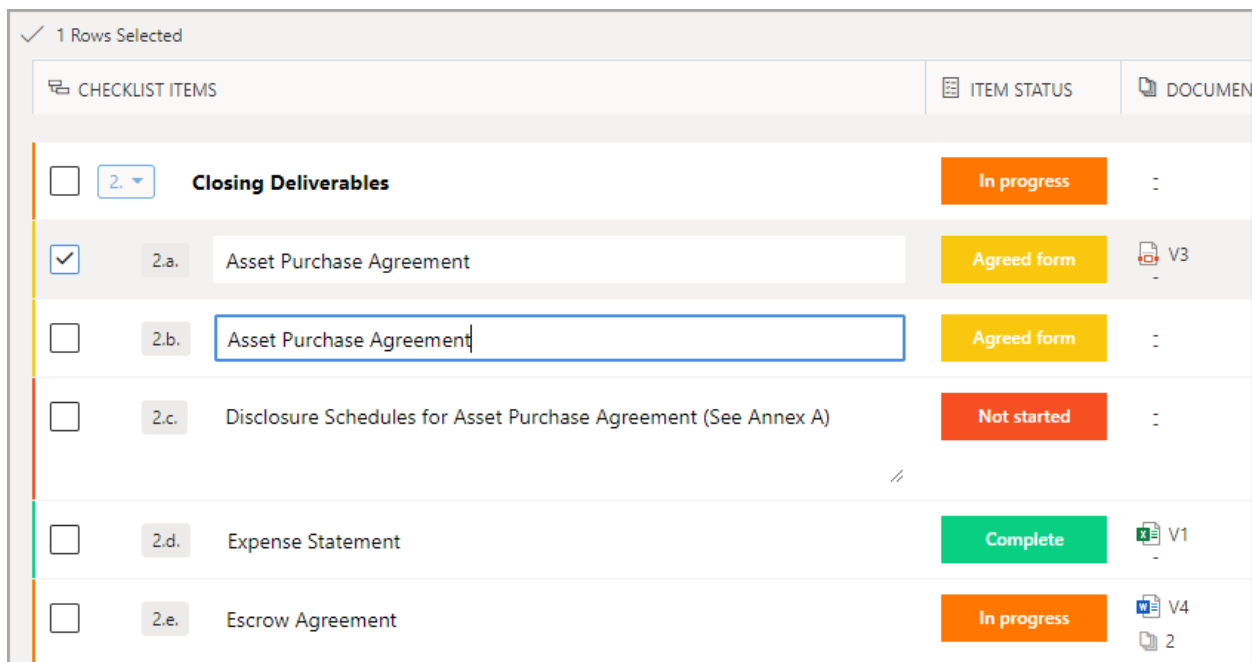
To make the user experience more seamless, we've made the following enhancements to the checklist:

- **Maintain the expanded or collapsed state of checklist items**

Previously, when users navigated away from the checklist and navigated back, the system automatically expanded sections (first level rows) but automatically collapsed anything else (second level items and beyond). We've removed this assumption of how users want the checklist displayed, and for convenience and ease-of-use, the state of checklist items (collapsed or expanded) is remembered when users navigate back to the checklist.

- **Place duplicated items directly below the original item**

Previously when a checklist item was duplicated, users would need to scroll to the bottom of the parent item to see the duplicated item. This could be cumbersome, particularly with long checklists with multiple, complex sub-levels. Now users can see the duplicated item directly below the original item which they can then rename, move, or modify as required.



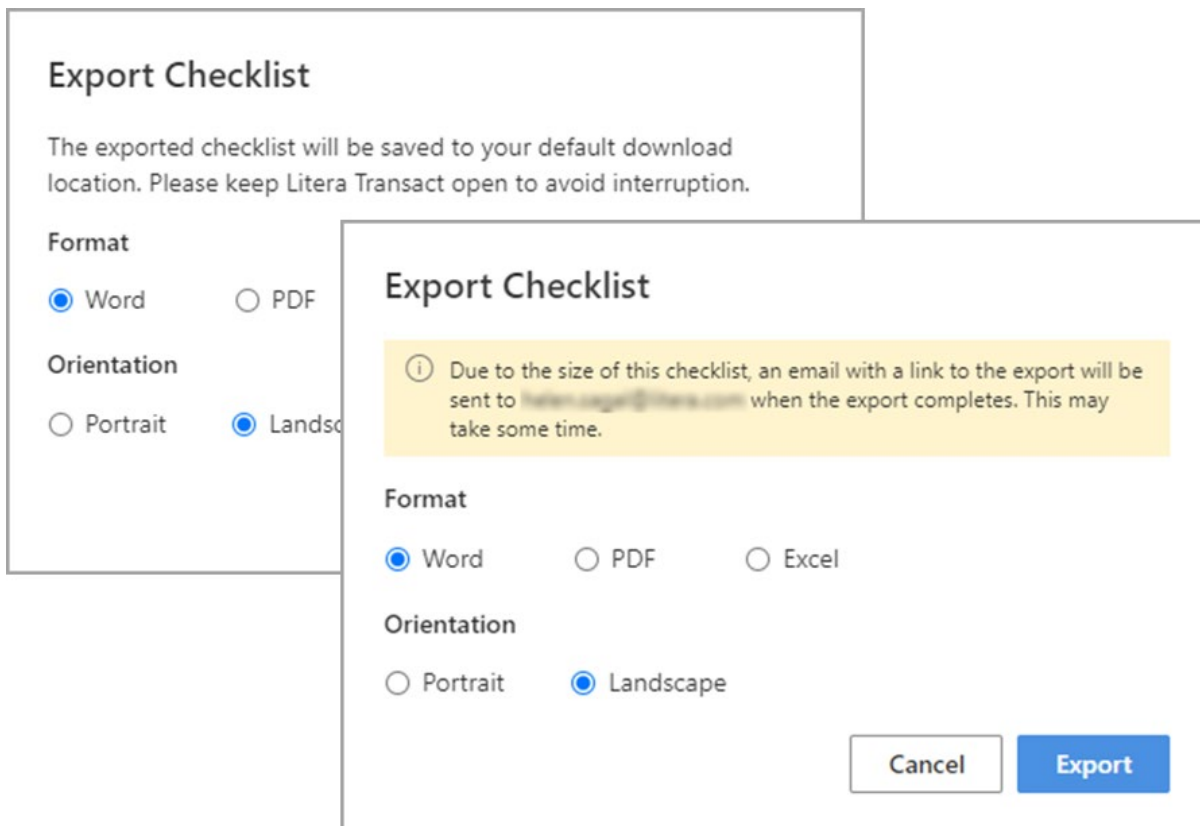
CHECKLIST ITEMS		ITEM STATUS	DOCUMENT
<input type="checkbox"/>	2. Closing Deliverables	In progress	:
<input checked="" type="checkbox"/>	2.a. Asset Purchase Agreement	Agreed form	V3
<input type="checkbox"/>	2.b. Asset Purchase Agreement	Agreed form	:
<input type="checkbox"/>	2.c. Disclosure Schedules for Asset Purchase Agreement (See Annex A)	Not started	:
<input type="checkbox"/>	2.d. Expense Statement	Complete	V1
<input type="checkbox"/>	2.e. Escrow Agreement	In progress	V4 2

**Note:** In preparation for our development of customizable checklist columns, users may notice the filter icon in a column header has moved to a context menu displayed by clicking the header.

### Improvement of scalability and stability of platform

Previously, some processes in Litera Transact could take a long time, particularly in deals with huge numbers of files and lengthy checklists. We've improved performance and the user experience in several areas:

- Exporting large checklists can take some time and in such cases, users receive an email when the export is complete rather than an immediate download. It wasn't always clear to users how they would receive an exported checklist. We've optimized the checklist export to improve performance and also added messaging to notify users of how they will receive the exported checklist – download or email.



- Daily digest emails summarize events occurring in deals over the last 24 hours. Sometimes, when large numbers of events had occurred in deals and many users required the daily digest, there were delays and issues in receiving the email. We've improved performance and users now receive the daily digest email in a timely and reliable manner.
- Adding and removing users in the working group list sometimes seemed to be a drawn out task. We've improved performance so that adding and removing users, organizations and roles in the working group list is now a more streamlined and snappier process.

## Release Notes

## Version 4.21.0

### Audit log updates for Mercury compliance

For signature-related events, the audit log will now indicate when the Mercury workflow is used.

**Mercury\_** is added to the event description.

Timestamp	Event Identifier	Event Description	User Email	User Name
2023-08-04T08:44:12Z	item.updated	2.a. Asset Purchase Agreement was updated in the Checklist of Santa Monica Development	elizabeth.morris@mintonslaw.com	Elizabeth Morris
2023-08-04T08:44:57Z	document_signature_page.group_added	Kevin Singh was added to Signature Page 1 of Asset Purchase Agreement on Santa Monica Development	elizabeth.morris@mintonslaw.com	Elizabeth Morris
2023-08-04T08:44:57Z	document_signature_page.signed	Mercury_Lending Consortium for Kevin Singh for Signature Page 1 of Asset Purchase Agreement on Santa Monica Development	elizabeth.morris@mintonslaw.com	Elizabeth Morris
2023-08-04T08:44:57Z	signature_packet_page.created	Mercury_Signature packet Agreement was created	elizabeth.morris@mintonslaw.com	Elizabeth Morris

### Issues Fixed

- When users were logging in using single sign-on (SSO), large closing books (over 100MB of files) were not downloading. This issue has been fixed and all closing books are downloading successfully, even when users log in using SSO.
- Various performance and stability improvements.