Enhancements

Signature information in the checklist

Throughout this year, we will be releasing a complete redesign of the Litera Transact signature module that will simplify the signature flow, reduce signer setup friction, and unlock the full potential of the DocuSign integration.

A frustration for customers was the difficulty monitoring signatures from the checklist, so the first phase of the redesign will connect signatures to the checklist.

Users will see a new **Signatures** column in the checklist that shows the status and count of signatures for an item.

When signatures are required for a checklist item, and a signature page has been set up, the **Signatures** column will show how many signatures are required and how many have been received so far, for example, [2/4]. Until the signature page is set up, users will see: [0/0].

Hovering over the column shows exactly which signature groups and signers are required to sign the document.
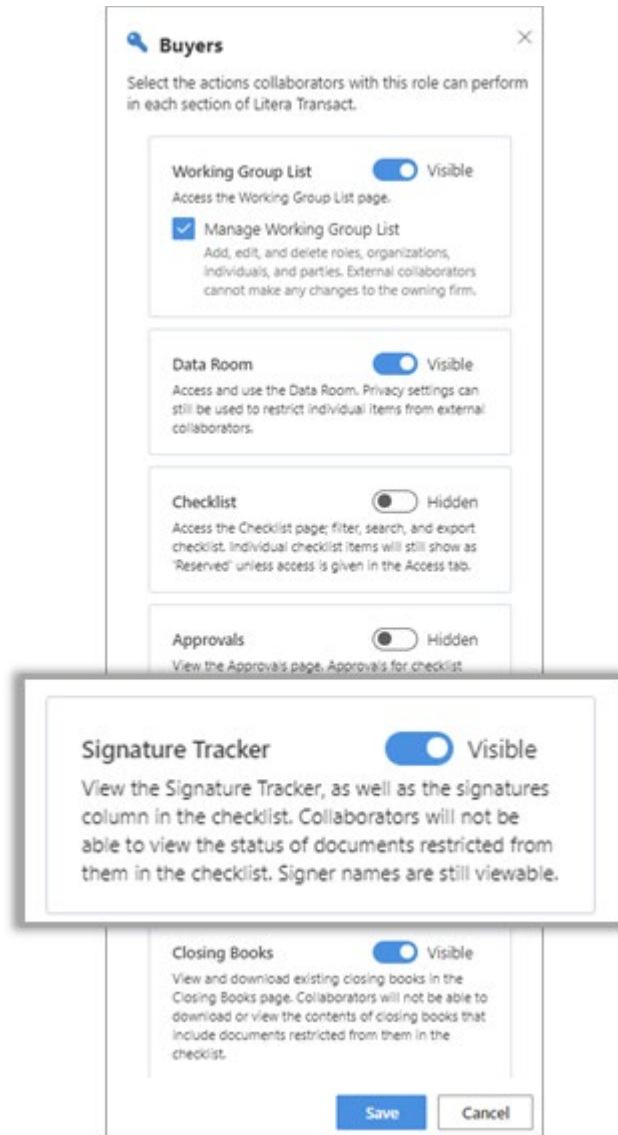
With edit mode on, owning firm users (except for Associate users) can rename the **Signatures** column, hide it, and change where it appears in the checklist. Any customizations are saved for the deal, and will be reflected in the exported checklist.

The **Signatures** column is visible to external collaborators if their role is given access to the Signature Tracker.

NetDocuments integration enhancements

To bring consistency across our DMS integrations and improve the user experience, we've introduced the following updates to the integration of Litera Transact and NetDocuments:

Support for multiple NetDocuments cabinets

To enable users to access the full range of documents they might need, we've added support for multiple cabinets in NetDocuments.

Previously Litera Transact connected to a user's preferred cabinet, as set in NetDocuments, so users could only upload documents to Litera Transact from their preferred cabinet.

Now, when uploading documents to the checklist from NetDocuments, users can choose a cabinet and then browse to the required document. In the same way, when saving documents from Litera Transact back into NetDocuments, users can choose which library to save to.
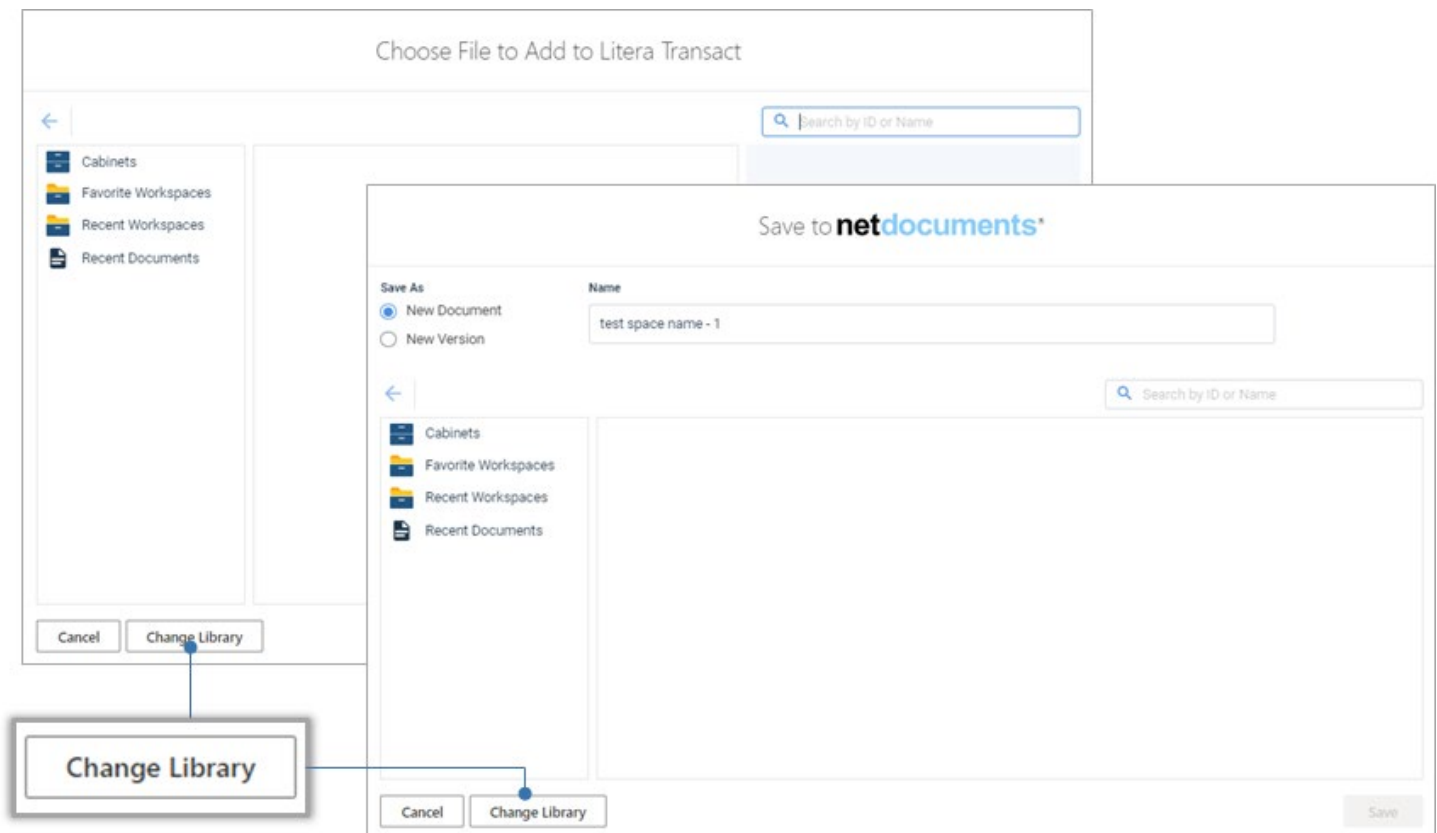
Users click **Change Library** to easily swap between libraries.

Note: NetDocuments has repositories. We can't switch between repositories directly but we can switch between cabinets that may reside in different repositories.

Notification that newer version available

When a file is uploaded from NetDocuments into Transact, and the file is subsequently updated in NetDocuments, Transact displays a notification that there is a newer version of the document available in NetDocuments.

Users can click **Update Available** to upload the newer version into Transact.

Enhanced search

When saving files to NetDocuments or uploading files from NetDocuments, the search functionality provided by Litera Transact was limited to a global search of the current cabinet. To enable users to find files more easily, we've enhanced the search functionality to search across all cabinets. Additionally, when users are in a particular folder, the search will focus on that folder and return results from within that folder and its subfolders.

Note: Litera Transact does not search workspaces.

Clear messaging

To enable users to confidently carry out actions in Transact, we've improved the notification messages when saving files to NetDocuments or uploading files from NetDocuments.
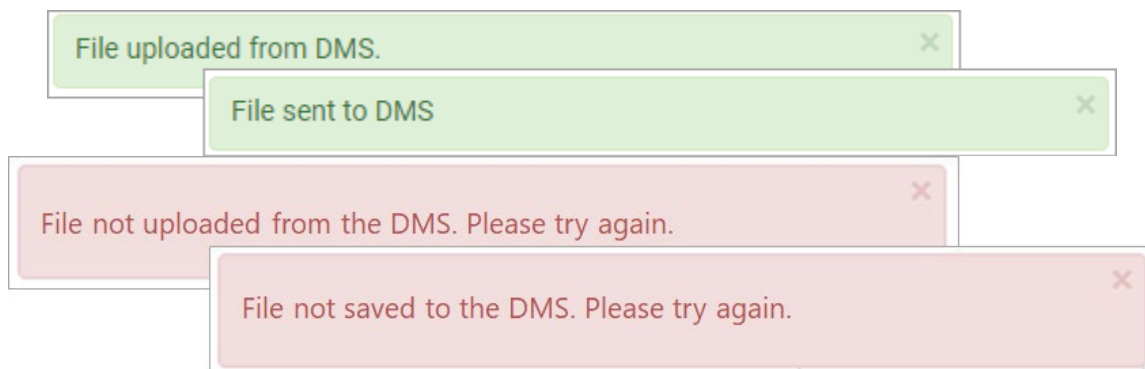
Note: Litera Transact can only confirm the file has been sent to the DMS – NetDocuments handles the actual saving.

iManage integration updates

We've made several improvements to our iManage integration:

- **Enhanced search**

  When saving files to iManage or uploading files from iManage, the search functionality provided by Litera Transact was limited to a global search of the current library. To enable users to find files more easily, we've enhanced the search functionality to focus on the current folder. So if the user is in a particular matter, the search will look for the search term in the folders and subfolders of that matter only, thereby quickly returning more relevant results.

- **Clear messaging**

  To enable users to confidently carry out actions in Transact, we've improved the notification messages when saving files to iManage or uploading files from iManage.

Comprehensive navigation to the checklist

Previously, the navigation page in Transact enabled users to navigate to top-level items in the checklist. This didn't allow for detailed navigation, particularly when checklists included many levels of items.

To enable users to go to a specific item at any level in the checklist without scrolling, we've added a complete tree structure to the navigation pane.
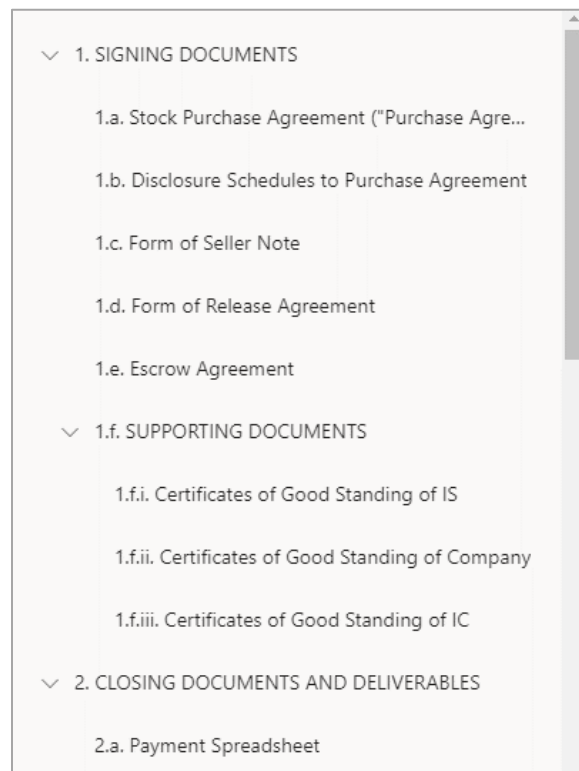
Selecting an item in the navigation pane automatically scrolls the checklist to that item, expanding a section if necessary.

Bulk unassigning of checklist items

To speed up the process of making the same change to many items, Litera Transact has the option to bulk apply in several areas. One such area is assigning responsibility for checklist items. Users can select multiple items in the checklist, then use the **Bulk Apply > Assigned To** option to assign those items to a selected individual, organization or role. We've enhanced this functionality so that users can now also **unassign** in bulk.
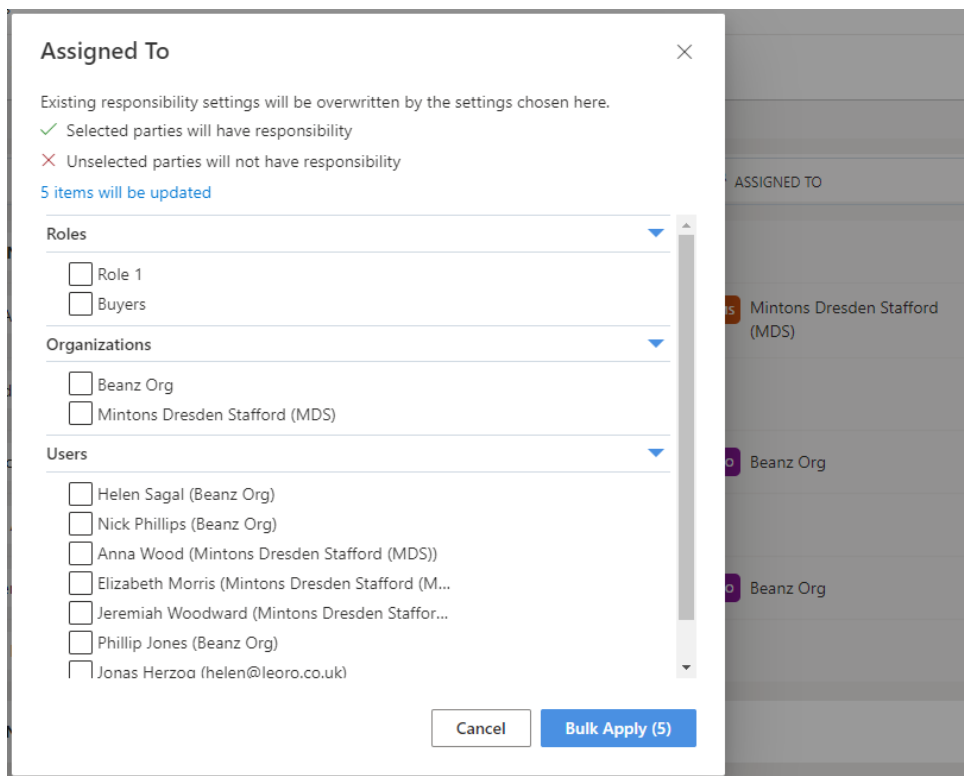
By selecting **Bulk Apply** without selecting any roles, organizations, or individuals, users can effectively remove any existing responsibilities set for the selected items.

Owning firm users (except for Associate users) and external users with permission can bulk unassign items.

Issues Fixed

▪ Admins could not re-enable some disabled users. This issue has been fixed and administrators can enable all disabled users from the Litera Transact Admin Portal.

- Adding additional users to a long list of approvers for an approval request was sometimes removing organizations already added to the request. This issue has been fixed and users can be successfully added to an approval request without affecting any of the existing approvers for the request.

- When the People database included large numbers of organizations, loading could take a long time when adding organizations from the working group list. The loading speed has been improved and organizations now load more quickly in the Add Organization modal.

- Various performance and stability improvements.