Enhancements: 4.27.0

Signature information in the checklist

Continuing our work to connect signatures to the checklist, we've made the following enhancements.

Detailed signer information on hover

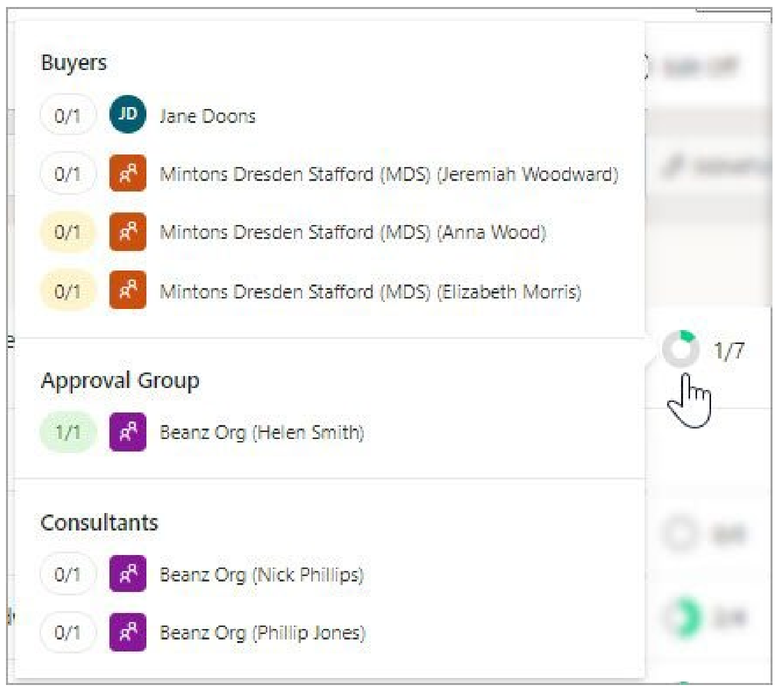
It's important for law firms to quickly understand who is required to sign a document and whether they have signed already. Now this information is readily available without leaving the checklist.

Hovering over the **Signatures** column displays more signer information.

As well as which signature groups and signers are required to sign the document, users can now see a color-coded status next to each signer indicating whether pages have been sent and signed.

- 0/1 White: Pages not sent
- 0/1 Yellow: Pages sent but not yet signed
- 1/1 Green: Pages signed

This information is also shown when hovering over the signatures status in the **Overview** tab of the details panel (shown on the right when selecting a checklist item).



Quick access to the signature workflow

Users can now jump into the signature workflow directly from an item in the checklist using options available in the **More** menu.

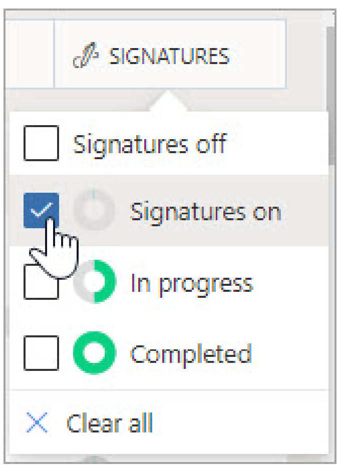
Options in the menu include:

- **Set up/Edit signature pages**: Links to the **Pages** tab of the **Signatures** module where users can set up the signature page for the checklist item or edit an existing signature page.
- **Go to tracker**: Links to the **Tracking** tab of the **Signatures** module where users can see the status of all documents requiring signatures, and send packets for signing.
- **Turn off signatures**: Turns off signatures for an item. This option is only available when no pages have been sent for signing.

Note: The **More** menu is also available in the **Signature Required** area in the **Overview** tab of the details panel (shown on the right when selecting a checklist item).

Filtering checklist by signature status

To enable users to focus on what matters to them, they can filter the checklist by signature status.



By clicking the **Signatures** column header, and selecting **Filter**, users can select to display only items in the checklist with a specific signature status.

Hyperlinks in the checklist

It is often useful to include links to websites, DMS locations, CRMs, etc. in the checklist. Links are now recognized in custom (free text) columns and in the **Status Note** column. The links are also maintained in the checklist export.

New Full Admin role

Previously, only users with the **System Admin** role could access the Litera Transact Admin Portal. This was appropriate for configuring organization settings and firm-wide third-party integrations. However, it is often users with **Firm Admin** roles that need to create reports, such as user reports and deal reports, and these reports are available from the Admin Portal.

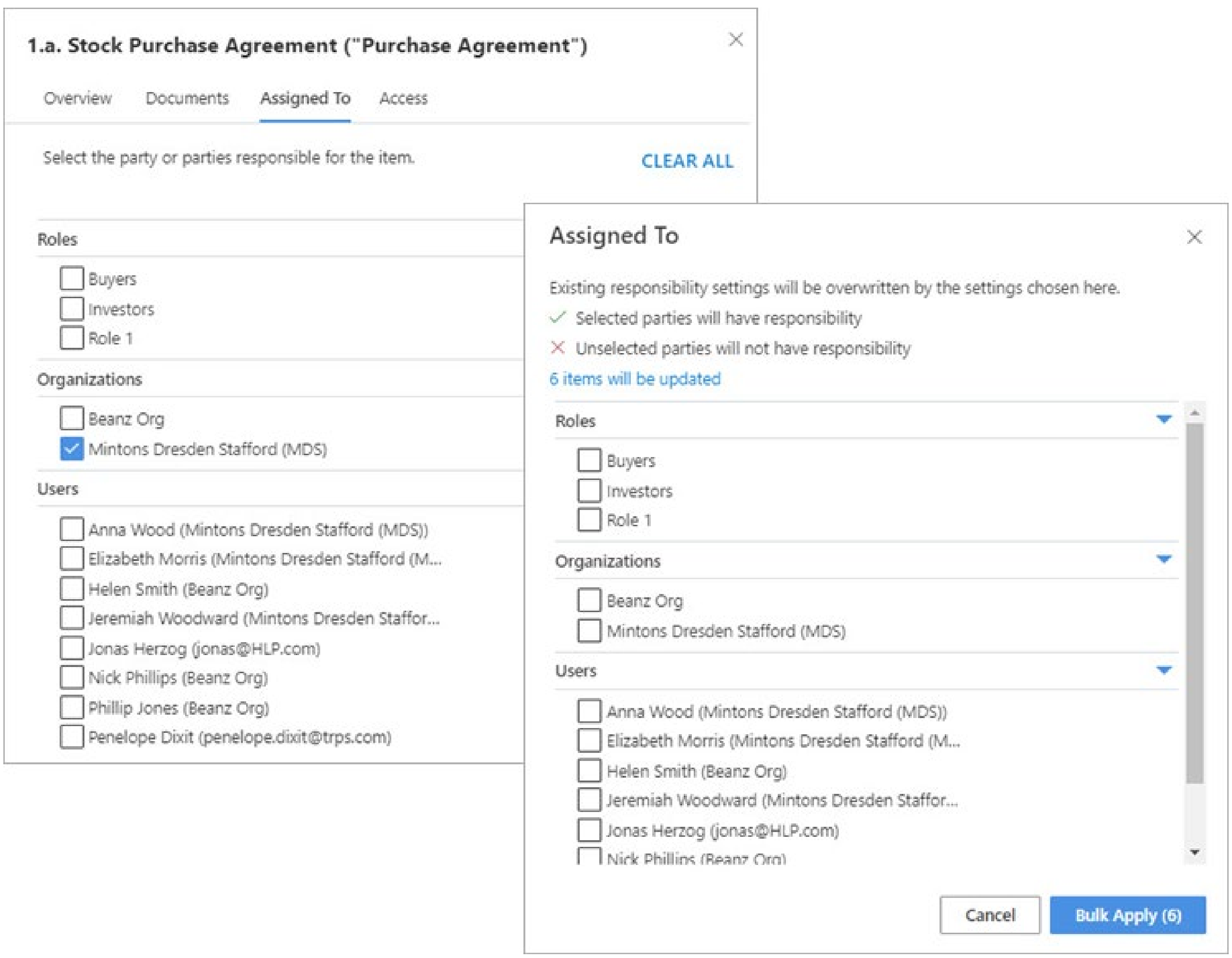
With this release, we've added a new **Full Admin** role to Litera Transact which combines the permissions of the **System Admin** and the **Firm Admin** roles. So users with the **Full Admin** role can access the Admin Portal as well as all deals in Litera Transact, and perform all actions that a **System Admin** and **Firm Admin** can perform.

Initially, Litera must assign a user the **Full Admin** role in an organization and customers should contact Litera Customer Support to request this. Full Admin users can create other Full Admin users in their organization.

Note: All Full Admin users are added automatically to all deals.

UX improvements in the Assigned to list

Previously, information in the 'Assigned To' list (in both the **Assigned To** tab in the details panel and in the Assigned To dialog when bulk applying) was displayed in the order an item was added. To improve the ease of finding users and organizations and to match the display in the checklist, roles, organizations, and users are now displayed in alphabetical order.



Note: Until the next release, roles, organizations, and users will still appear in the order added in the exported checklist.

NetDocuments and iManage integration enhancements

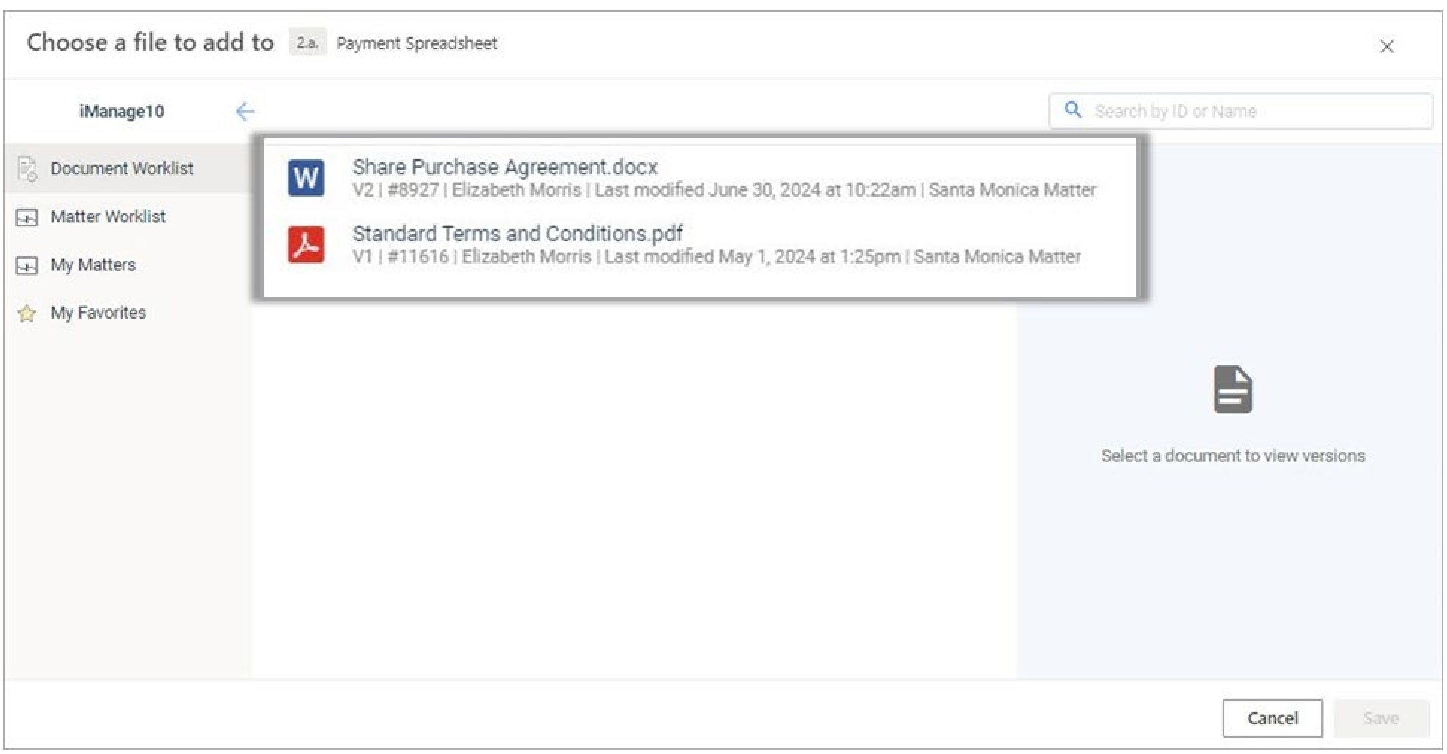
To improve the user experience, we've tidied up the interface and introduced the following updates to the integration of Litera Transact with iManage and NetDocuments:

See DMS metadata when selecting files

To make it easier for users to select the files they need, we've included file-related details with the file names when uploading files from iManage and NetDocuments into Litera Transact.

When selecting files from iManage or NetDocuments, users will see the following information (if available):

- Version number
- Document ID
- Author name
- Date and time last modified
- Matter name



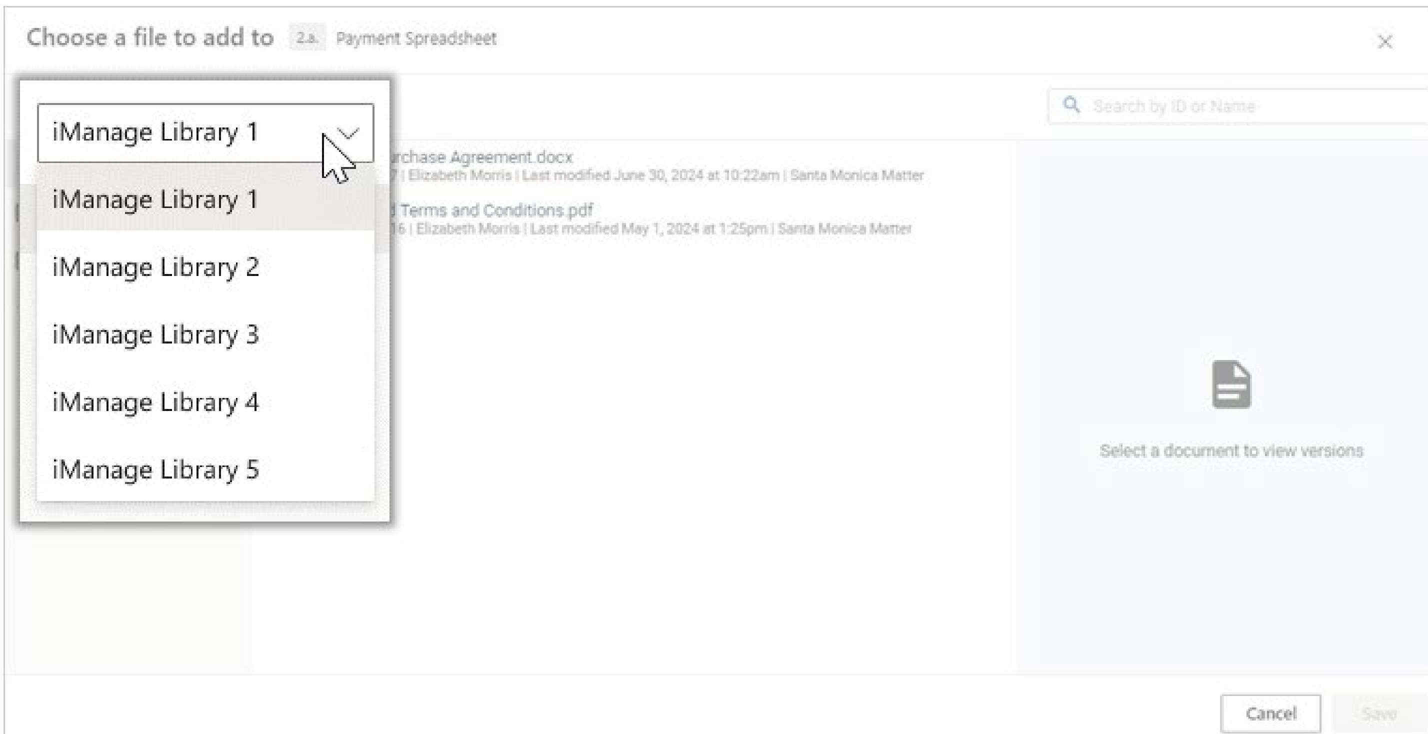
For a folder, users will see the name of the owner.

Show library name when selecting files

Previously, the Change Library button was in the lower left when selecting or saving files and users could choose another library from a new dialog that displayed after clicking the button.

To make it easier for users to know which library (iManage) or cabinet (NetDocuments) they are in and to select the files they need, we now clearly display the library or cabinet name and users can switch libraries/cabinets using a dropdown list.

Users will see this dropdown when selecting DMS files to upload to Litera Transact and when saving files from Litera Transact into their DMS.



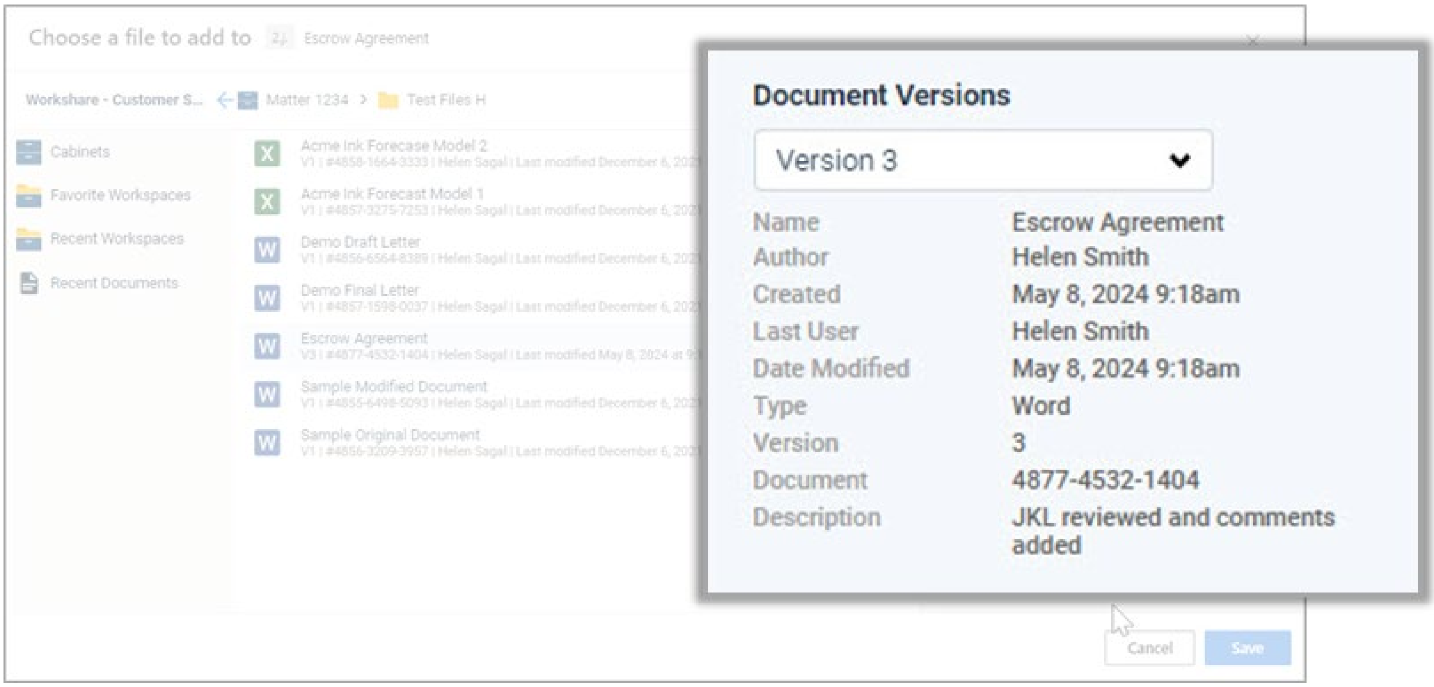
Note: We also make it clear at the top of the dialog which checklist item users are uploading to or saving from.

Now, when uploading documents to the checklist from iManage or NetDocuments, users can quickly see the current library/cabinet, choose another library/cabinet if required, and browse to the required document. In the same way, when saving documents from Litera Transact back into iManage or NetDocuments, users can choose which library/cabinet to save to.

Show comments/descriptions for a file

Previously, when selecting files from iManage or NetDocuments, any comments (iManage) or description (NetDocuments) related to the document version were not shown.

These comments/descriptions, added when saving a version to iManage/NetDocuments, can often help users select the correct file to upload so we've now surfaced version comments/descriptions when uploading files from iManage and NetDocuments into Litera Transact.



Note: Comments and descriptions are available when uploading latest versions and related documents.

Issues Fixed

4.27.1

- When Litera Transact was integrated with iManage or eDOCS via SeeUnity, the file picker was crashing when users tried to upload from the DMS. This issue has been fixed and users can successfully upload files from iManage and eDOCS via SeeUnity into Litera Transact.

4.27.0

- When Litera Transact was open in two browser tabs at same time and one instance timed out, users were timed out of both. This issue has been fixed and when Litera Transact is running in multiple browser tabs, as long as users are active in one tab, all Transact tabs will remain active.
- When signing up for Litera Transact, the terms of use link was broken. This issue has been fixed and the terms of use link correctly links to the latest Litera terms and conditions.

- When sending two or more pages for signature and one is manually signed, when the packet is opened in DocuSign/OneSpan, the status for all pages is "Opened". This issue has been fixed and the status of the manually signed page stays as "Signed" while the other pages show "Opened".
- A deal audit report was not being received for some deals. This issue has been fixed and, when requested, deal audit reports are being received for all deals in Litera Transact.
- Various performance and stability improvements.