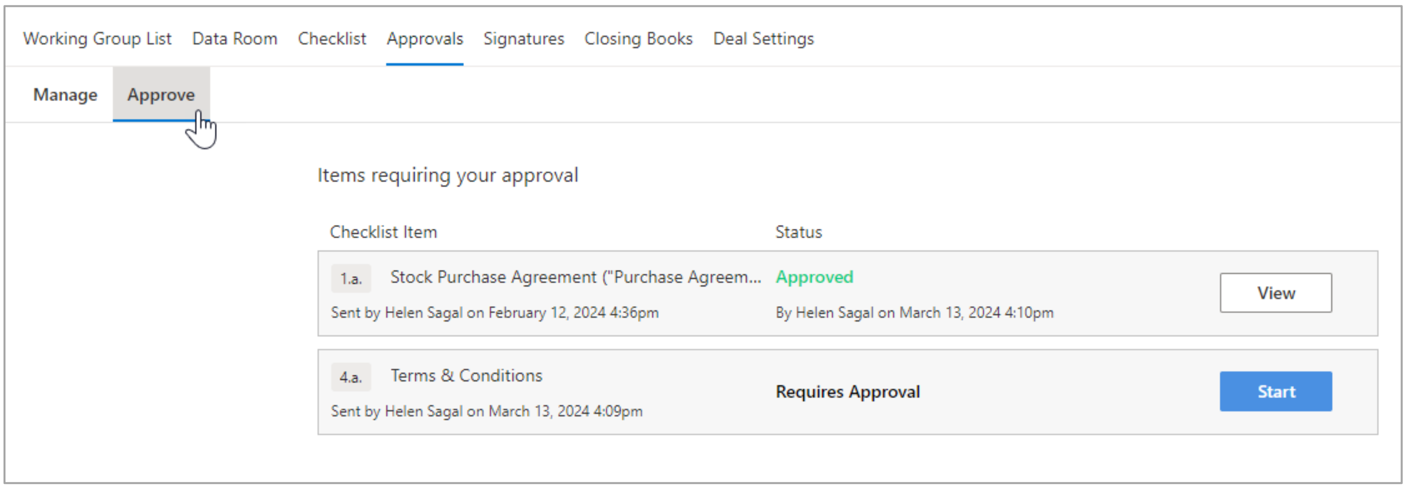
What’s new

Enhanced approvals functionality - New Approve tab

Previously, approvers could only access the approve process by clicking the link in the notification email. To avoid the need to leave Litera Transact and disrupt workflows, we've added an **Approve** tab to the Approvals page.

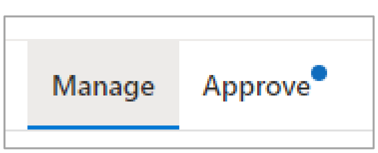


The Approvals page may include the following two tabs:

- **Manage tab**: Owning firm users with a Standard User, Firm Admin, System Admin, or Full Admin role will see the **Manage** tab and can create and send approval requests. Owning firm users with an Associate User role will not see the **Manage** tab. External collaborators in a role that has permission to view Approvals will see the **Manage** tab. They cannot create or send approval requests, but they can see the list of approval requests and their status and download the approvals report.
- **Approve tab**: All users who have been asked to approve an item will see the **Approve** tab showing the list of items they've been asked to approve.

Users can access the **Approve** tab in the Approvals page directly in Litera Transact or using the link in the approval request notification email.

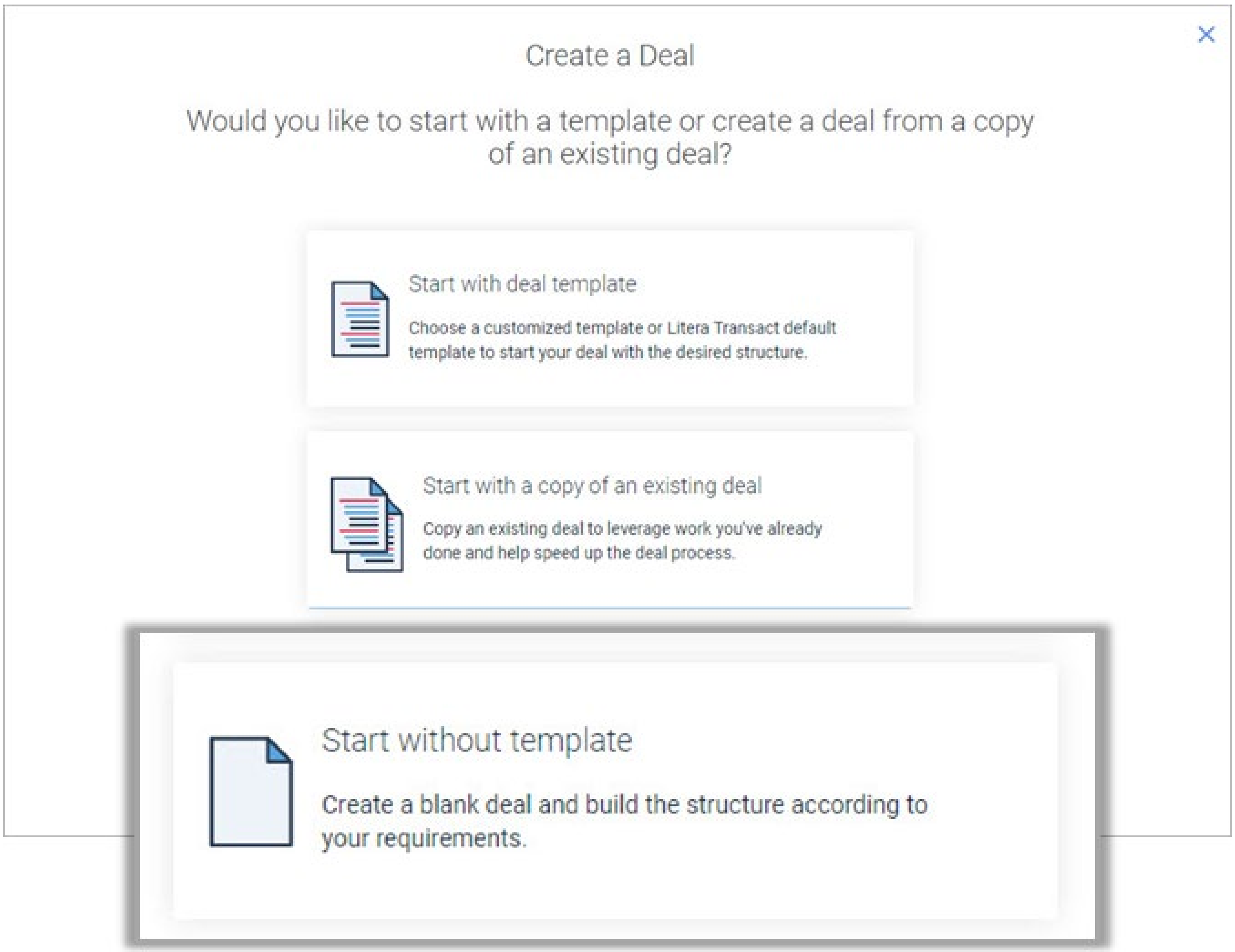
When a new approval request is received, the user will see an icon on the **Approve** tab to show there is a new approval request for them to approve.



Create deals without templates

Previously, when creating deals in Litera Transact, users either started with a template or copied an existing deal. To speed up the deal creation process and provide users with more flexibility, we've added an option to create a blank deal without a template. This provides the users with an empty checklist and the opportunity to start from scratch.

Note: Templates can provide a checklist structure and also include first versions of documents, signature groups, signature page edits at a document and group level, customized status labels, and customized checklist numbering and column names.

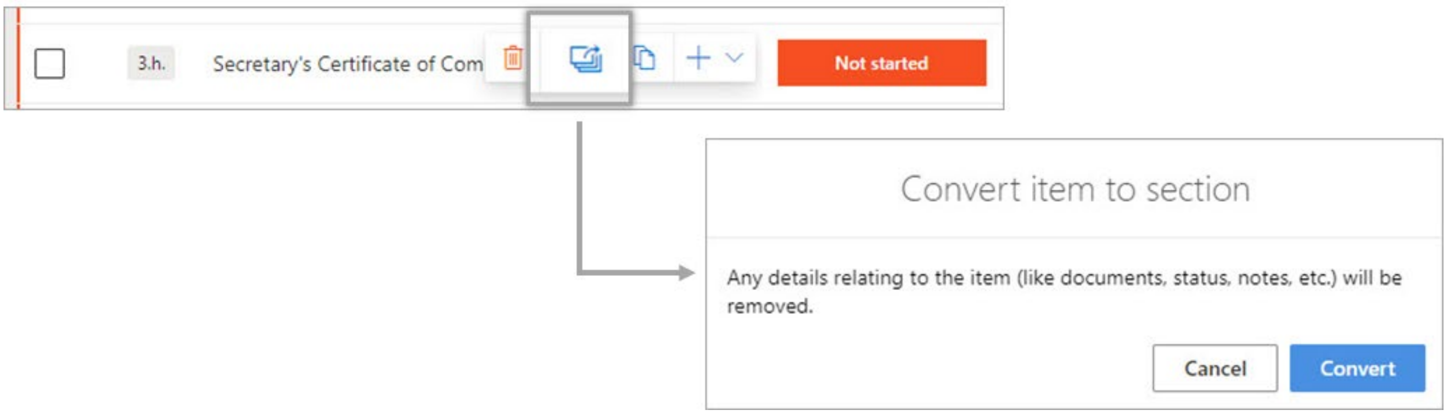


Once users have built up the deal according to their specific requirements, they can, if required, save it as a template so they can use it again.

Convert checklist items to sections

To add flexibility and quicker formatting of the checklist, users can convert checklist items to sections. In Litera Transact, sections in the checklist are 'organizing' rows with limited functionality. Sections can be added at the top-level or nested within the checklist.

The Convert option is in the action bar, displayed when hovering over a checklist item with Edit mode on.



When converting an item to a section, any documents, status notes, description, and assignees attached to the item will be removed.

Note: Users cannot convert an item to a section when signers/approvers are added, or a document is marked as an execution version, or the item is included in a closing book, or they don't have permission to delete documents.

UX improvements in the Assigned to list in the exported checklist

In the last release, we improved the ease of finding users and organizations by displaying roles, organizations, and users in the 'Assigned To' list in alphabetical order.

We've now made the same improvements to the exported checklist so that roles, organizations, and users appear in alphabetical order rather than in the order added.

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:

Display a default folder when selecting files

To make it easier for users to select the files they need, we now display a default folder when uploading files from iManage and NetDocuments into Litera Transact. In iManage, users will see Document Worklist and in NetDocuments, users will see Cabinets.

Improve Back button accessibility

For a more intuitive experience, we've improved how the Back button works when selecting files from iManage and NetDocuments.

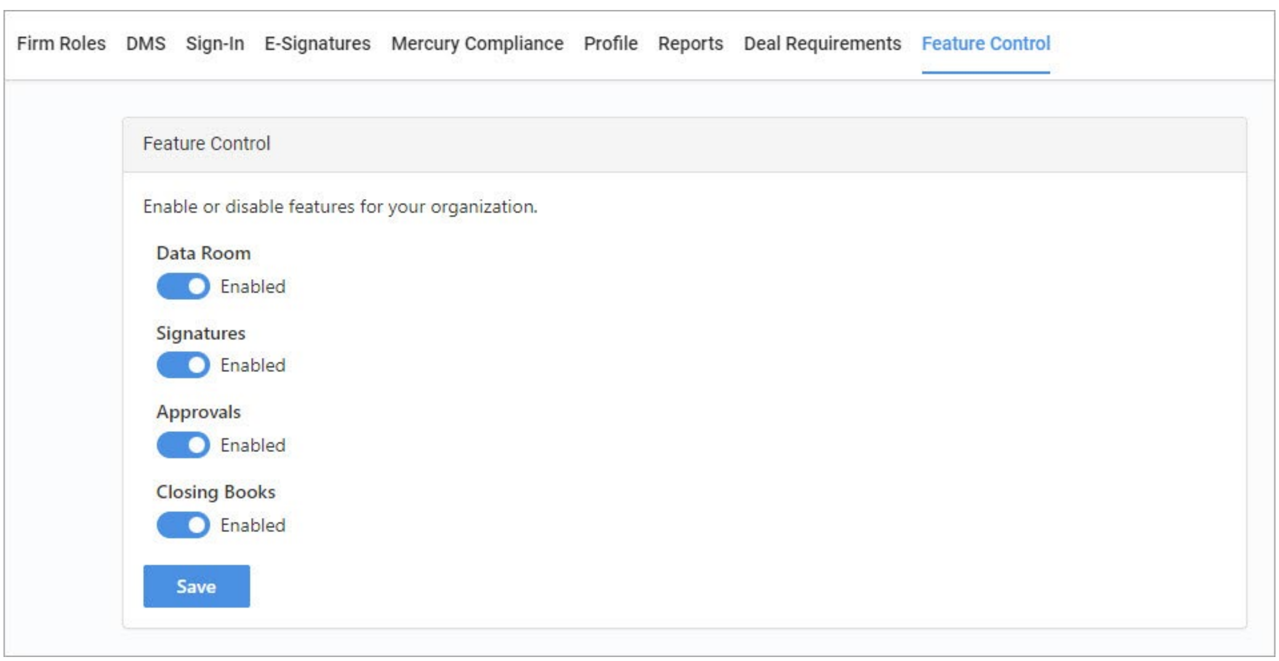
The Back button now only appears once users start to navigate in folders and won't display at all when users cannot go back (i.e. they are in a top-level location). The Back button is also more appropriately located to the right of the change library (iManage) or cabinet (NetDocuments) dropdown.

Show full list of data

To make it easier for users to select the files they need, we now display all folders and files when selecting files from iManage and NetDocuments. Previously, there was a maximum file limit display, but now all folders within a matter or files within a folder are shown and users can scroll through them to make their selection.

Control access to Litera Transact modules

Previously customers would have access to all modules on the Litera Transact platform. To add flexibility, administrators can now configure which modules will be available to the owning firm users from the Litera Transact Admin Portal.



Administrators can turn on/off the following modules:

- Data Room
- Signatures
- Approvals
- Closing Books

The following modules are always available and cannot be disabled: Working Group List, Checklist, Deal Settings, and, for those with permission, the Admin Portal and the People database.

Audit log improvements

To improve the user experience, we've enhanced performance and generating times for the audit log.

Fixed issues

Issue Description	Case Number
Lazy loading was not working correctly in the Manage Approvers dialog at certain zoom levels. (Lazy loading is a technique for waiting to load certain parts of a webpage until they are needed.) This issue has been fixed and all organizations and individuals from the working group list are correctly listed in the Manage Approvers dialog, regardless of zoom level.	00893633
The NetDocuments integration wasn't allowing specific users to see all existing folders in their main cabinets and workspaces. This issue has been fixed and when uploading files from NetDocuments into Litera Transact users are able to see all folders and files.	00941838
Creating signature pages using the Multi-Party Agreement, Letter, and Certificate templates was causing problems when adding signers and when cloning deals. This issue has been fixed and signers can be successfully added, and deals including individual signer details (blocks, pages, and formatting) can be successfully cloned.	00965956, 00970957
Various performance and stability improvements.	