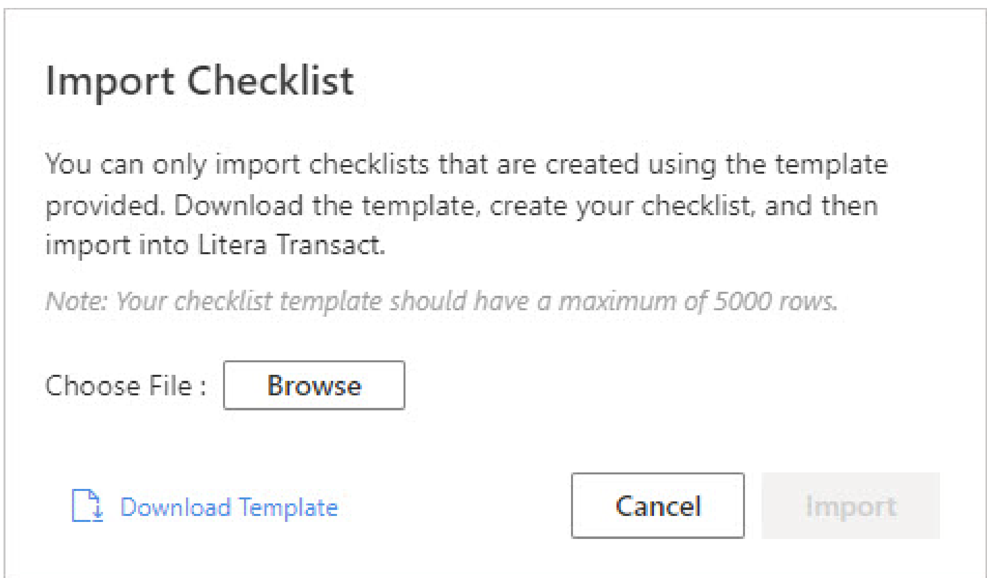
What's new

Import checklists

Currently in Litera Transact, users either start a deal without a template and build a checklist from scratch, or they use a template/copy an existing deal to provide a structure for the checklist. These workflows do not provide an easy option for deal teams who create their checklists in Word.

To enable deal teams to get started more quickly and to avoid the tedious task of recreating a checklist manually from scratch in Litera Transact, users can now import a checklist that has been created outside of Litera Transact.

To successfully import a Word checklist into Litera Transact, the checklist must be created in a particular template which can be downloaded from Litera Transact.

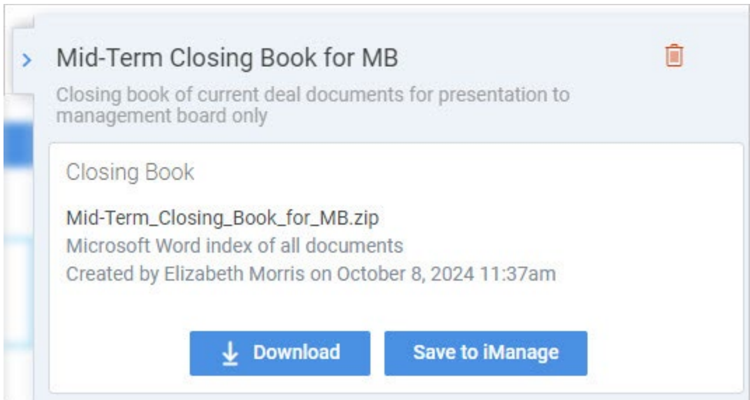


Users can import up to 5000 checklist items at one time to create a complete checklist in Litera Transact, or use import to add additional items to an existing checklist.

Guidance on using the import functionality is available in the Litera Transact help center.

Save closing books to DMS

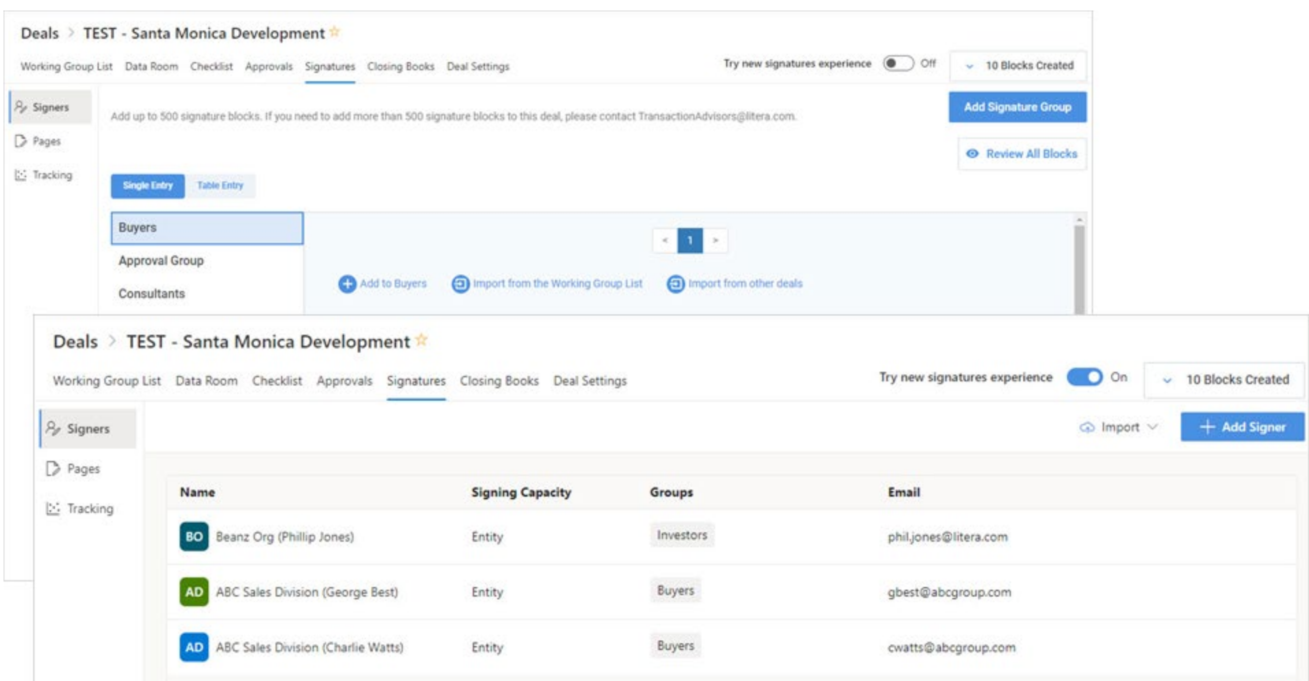
Currently users can only save closing books locally. To provide flexibility and remove the need to re-save a closing book into the DMS, we've added the ability to save closing books to the DMS.



Depending on the DMS integration, users can save closing books from Litera Transact to iManage or NetDocuments.

New Signers page in Signatures module

This release includes another phase in our redesign of the Litera Transact signature module to simplify the signature flow. A frustration for customers was the tedious process to add signers into Litera Transact. To reduce signer setup friction, we've redesigned the **Signers** page to provide a smooth, straightforward, and speedy workflow.



As we continue to align functionality, users can switch between the old **Signers** page and the new **Signers** page, and see the same data in each layout.

Currently, it's not possible to set voting threshold in the new Signers page. Once we've completely aligned functionality, we shall replace the old experience with the new.

Known Issues

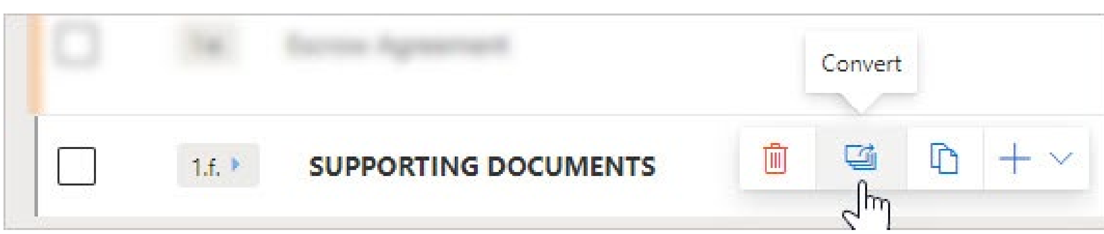
The following issues exist when using the new signer experience and cloning a deal:

- When selecting to copy signers, entity signers will not appear in the new **Signers** page in the new deal. Entity signers will show in the old **Signers** page. Users will need to create entity signers again when using the new signer experience.
- If there are any signers in the original deal that do not belong to a signature group, those signers will not be copied. Users will need to add these signers manually in the new deal. Prior to cloning a deal, make sure every signer is in a signature group to avoid this issue.

Convert checklist sections to items

Following on from the 'convert items to sections' functionality introduced in an earlier release, and to add flexibility and quicker formatting of the checklist, we've added the ability for users to convert sections to items. In Litera Transact, sections in the checklist are 'organizing' rows with limited functionality that can be added at the top-level or nested within the checklist.

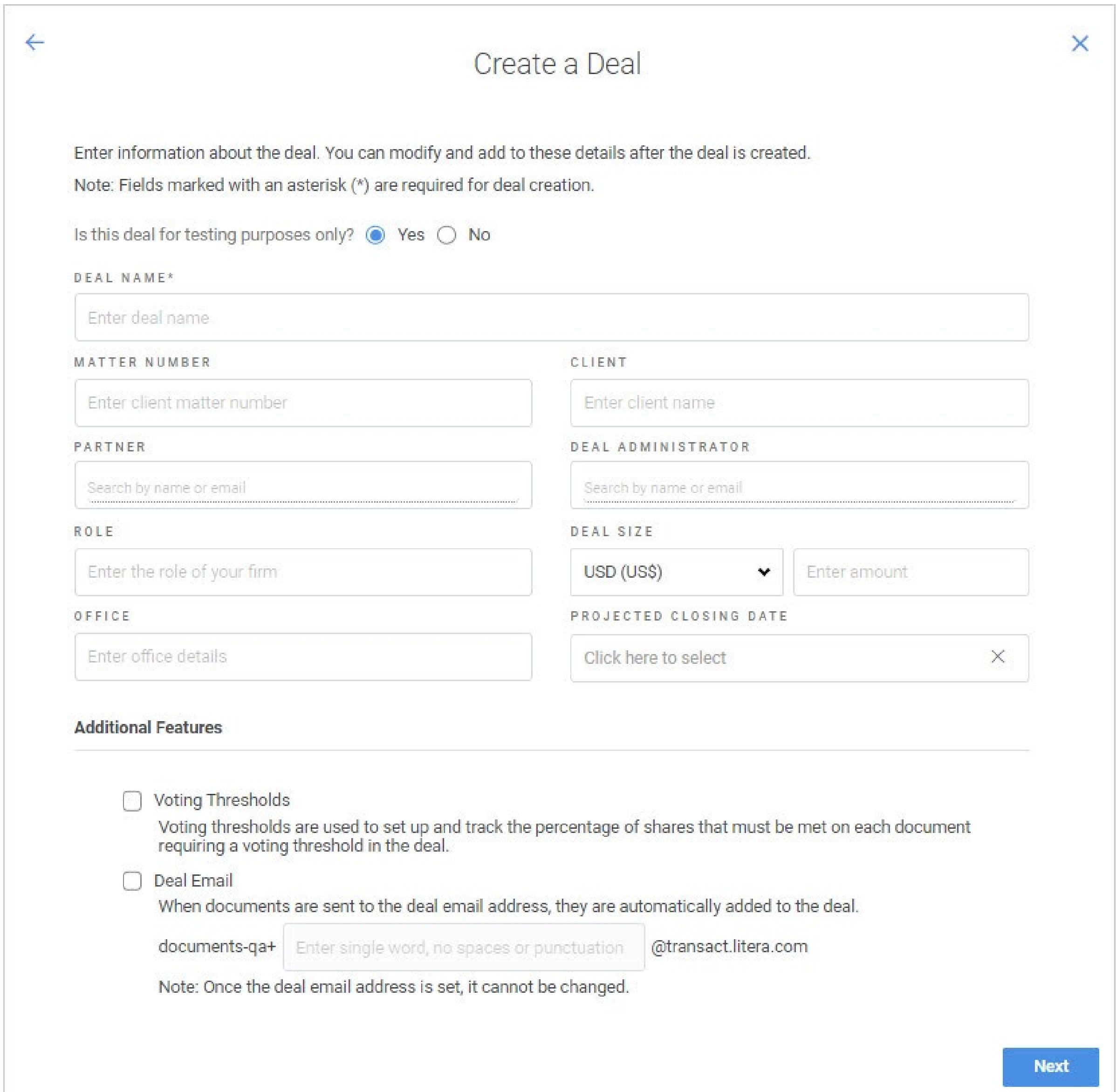
The Convert option is in the action bar, displayed when hovering over a checklist section with Edit mode on.



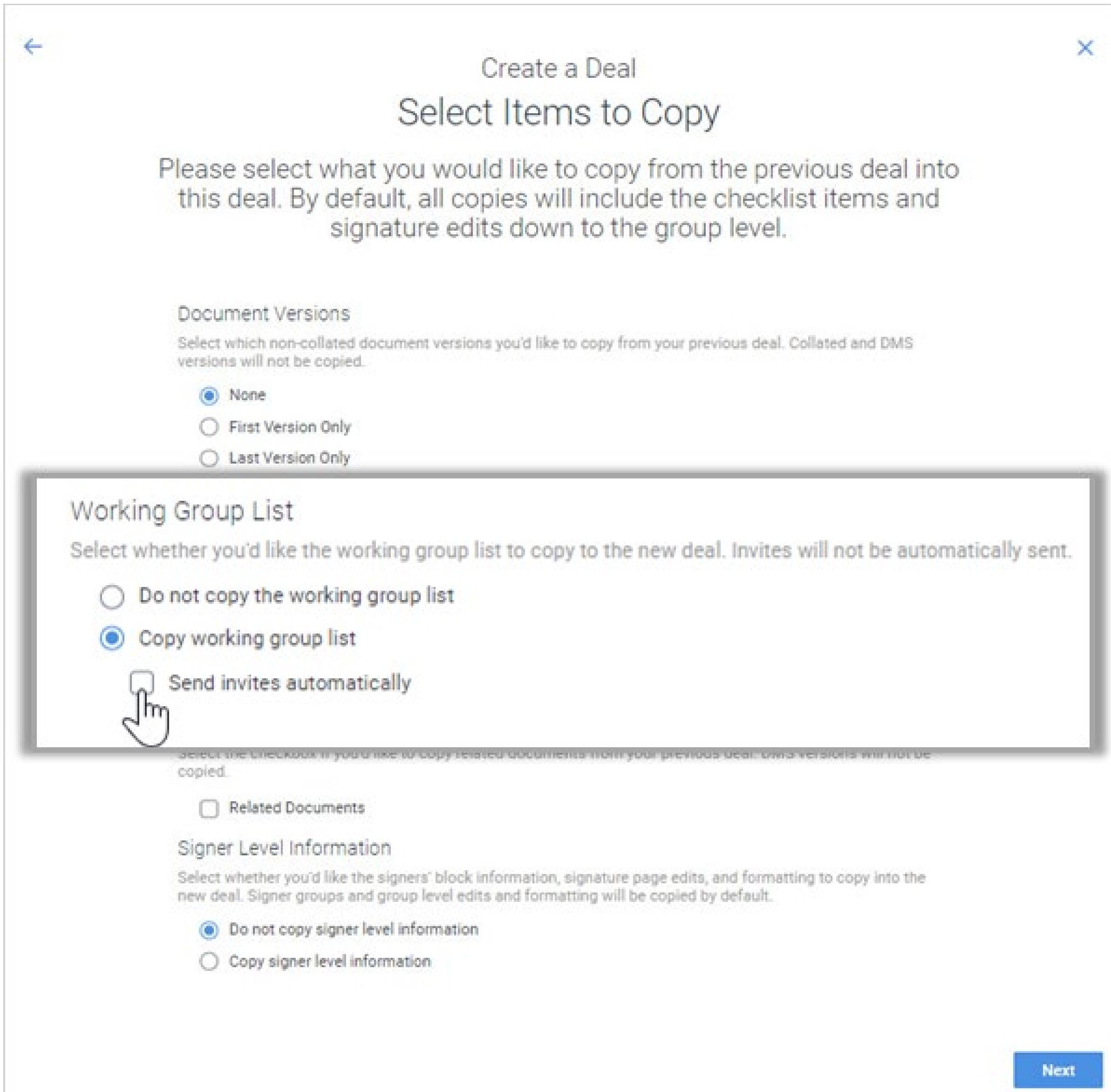
Streamlined create deal low

This release we have continued in our work to streamline and simplify the create deal process. Creating deals in Litera Transact involved several steps deciding on which functionality to include in a deal. These decisions could also be changed later in Deal Settings. To simplify the deal creation process and enable users to create deals more quickly, we've shortened the create deal flow and enhanced the user experience.

After the initial selection of the type of deal, all settings are combined into one page.



In addition, when cloning a deal, users were unable to copy the working group list. To save time and the need to add deal participants from scratch, users can now select to copy the working group list from an existing deal.



When users select to copy a working group list, they can also select to send emails automatically to everyone in the working group list to notify them of the new deal.

iManage on-premises integration enhancements

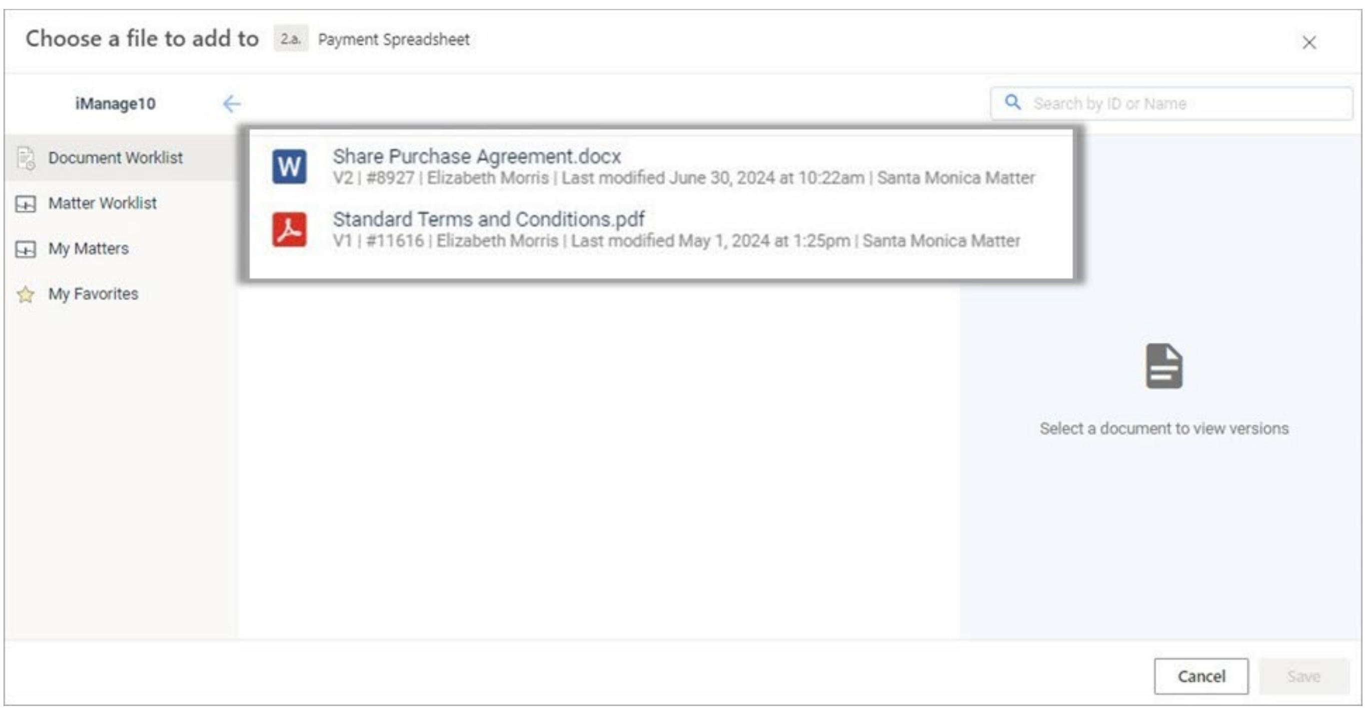
To improve the user experience and to align with the iManage cloud integration, we've introduced the following updates to the integration of Litera Transact with iManage on-premises (on-prem).

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 on-prem into Litera Transact.

When selecting files from iManage on-prem, users will see the following information (if available):

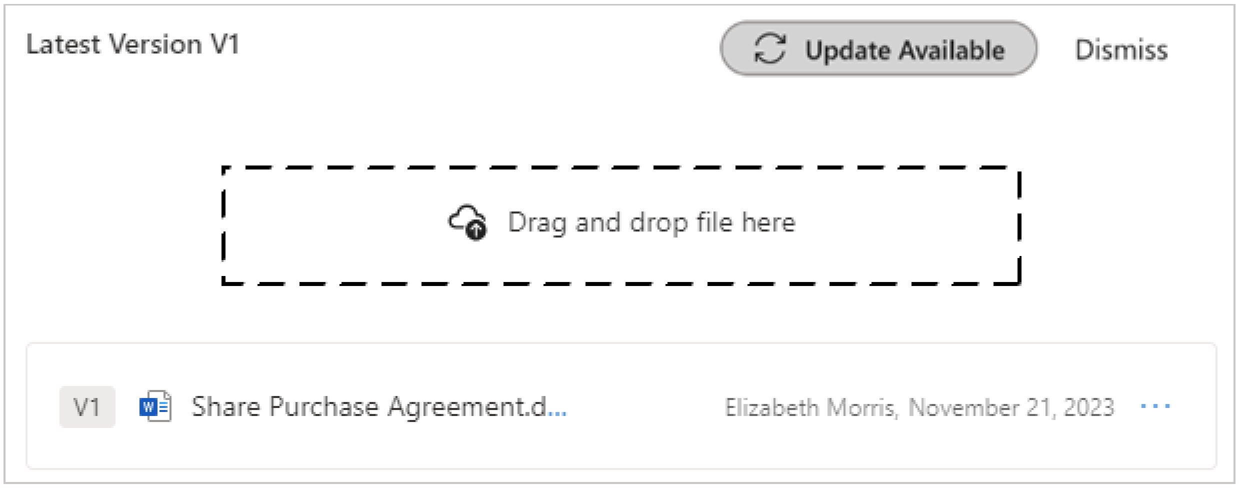
- Version number
- Document ID
- Author name
- Date and time last modified
- Matter name



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

Notification that newer version available

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

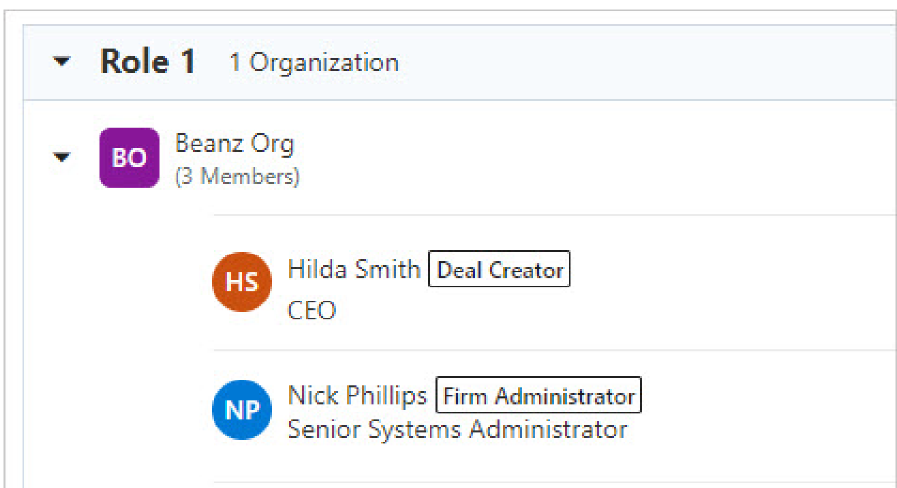


Users can click **Update Available** to upload the newer version into Litera Transact.

Indicator of deal creator

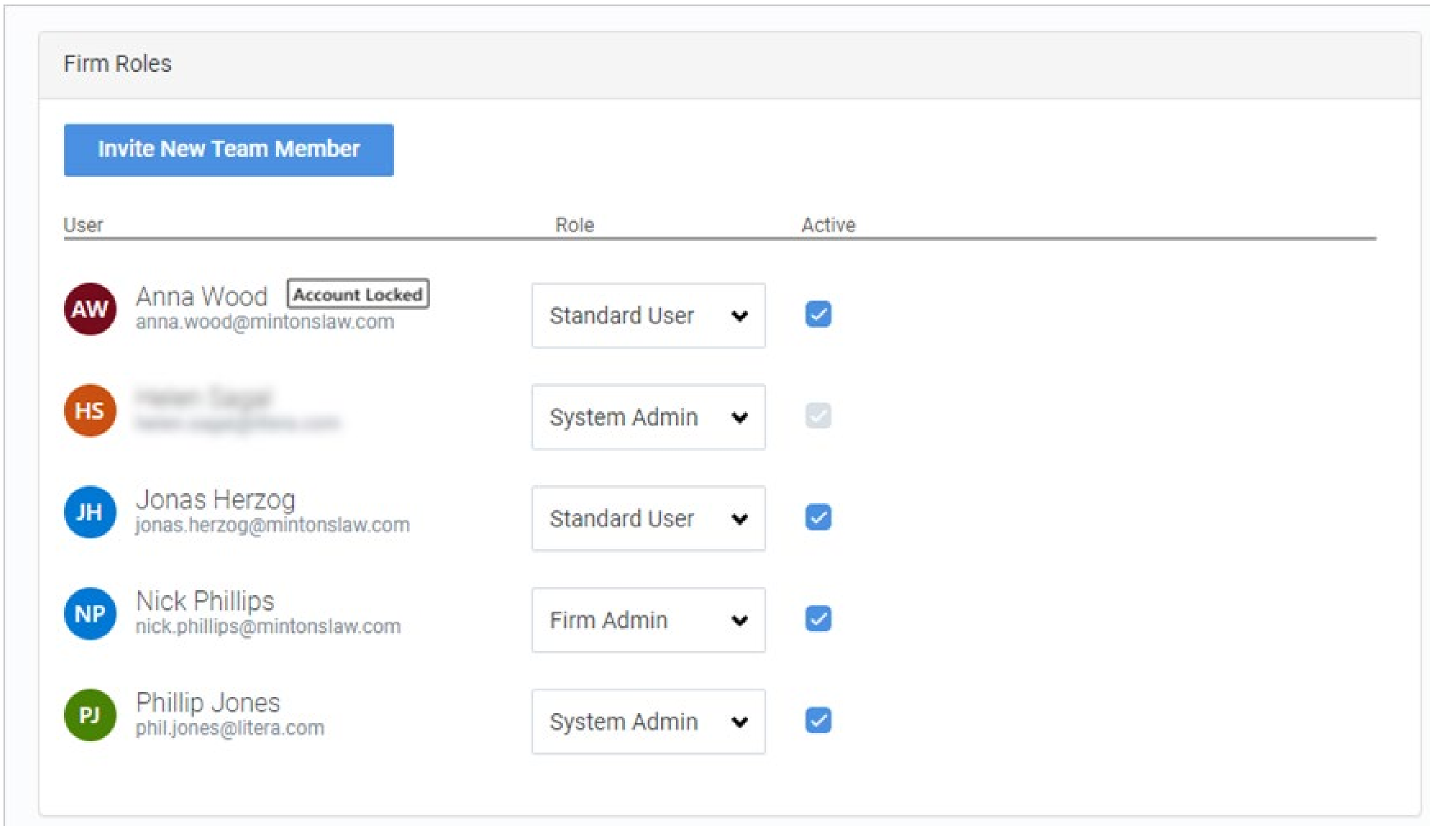
Currently, to find out who created a deal, admins need to run a report.

To avoid the need to run a report, we've added a label for the deal creator in the working group list – as we do for Firm Admins and Full Admins.



Indicator of locked account

In Litera Transact, a user's account is locked if the user has entered an incorrect password more than 5 times. To make it easier for the admin to understand which account is locked, we've added a label for the locked user in the Firm Roles tab of the Litera Transact Admin Portal.



Note: The locked user will receive an email from Litera to unlock their account.

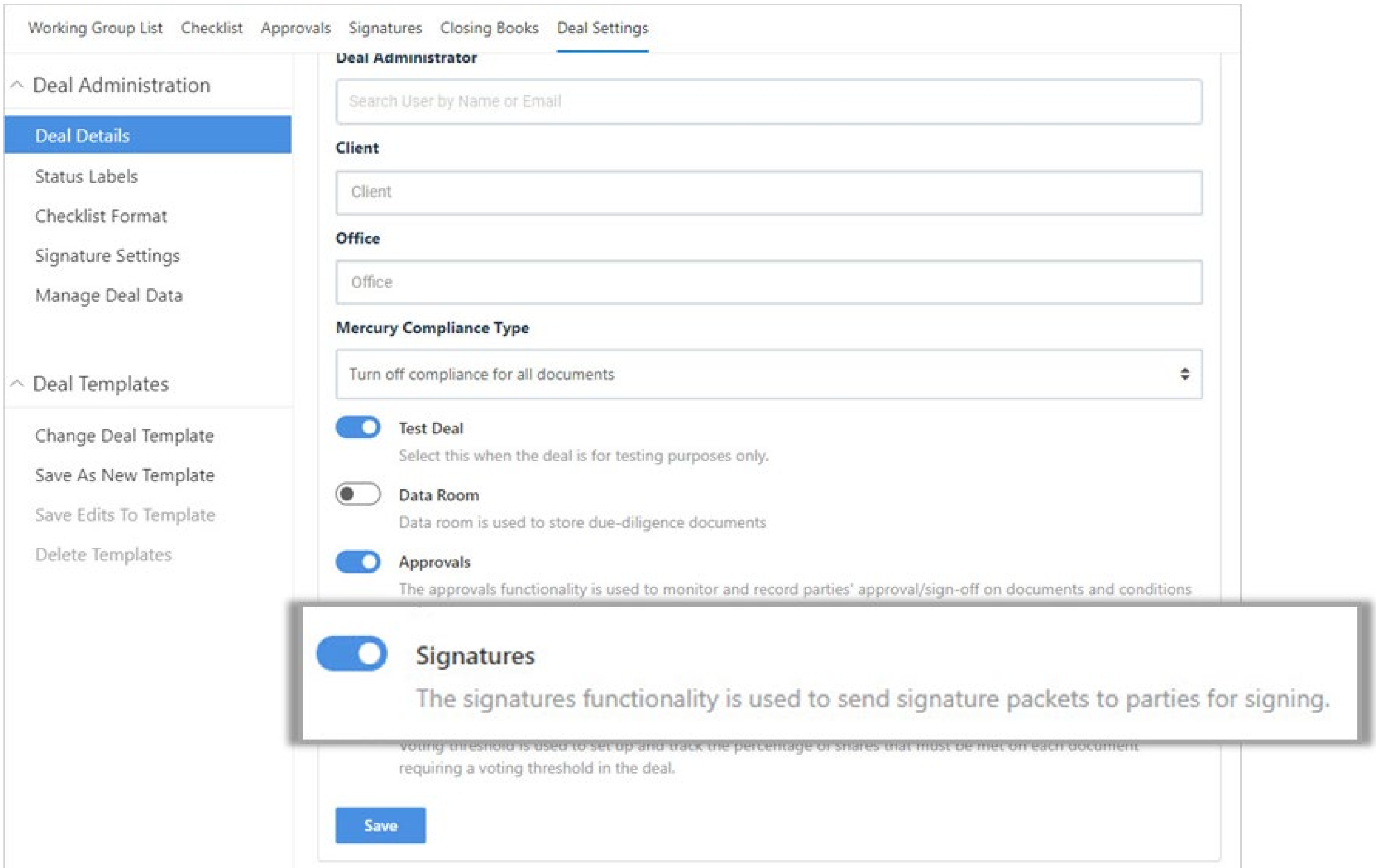
Audit log updates

To enable firms to track the client matter numbers associated with deals, client matter numbers are added to the organization audit log when deals are created or updated in Litera Transact.

The matter number, for example {"client_matter_number":"12345"}, is added to the **Details** column for deal.created or deal.updated events.

Toggle Signatures module from Deal Settings

Currently, the Signatures module is always available in Litera Transact. To align with other modules, such as Data Room and Approvals, we've added the ability to turn the Signatures module on and off on a deal-by-deal basis.



Note: To create a more intuitive experience, we've improved the user interface to use toggles, rather than checkboxes, to enable functionality and modules in Deal Settings.

Fixed issues

Issue Description	Case Number
Quotation marks in a checklist item name was causing issues in the closing book. When making PDFs of each document in the closing book and a PDF index, the quotation marks were replaced by /. For single PDF closing books, the quotation marks were replaced by / and the document attached to the item was removed. This issue has been fixed. Quotation marks are not removed or replaced in checklist item names and no documents are removed in the generated closing book.	00862487
After creating a closing book and then deleting a section from the checklist, returning to the Closing Books page was throwing an error. This issue has been fixed. Users cannot delete sections that have been included in a closing book and include items with documents attached – the user will see an explanatory message.	01017270
In environments where it is not possible to set a deal email (environments outside of the U.S.), setting a value for **Partner** and/or **Deal Administrator** when creating a deal was causing the deal creation to fail. This issue has been fixed and users can successfully create deals with **Partner** and **Deal Administrator** specified.	01039441
Various performance and stability improvements.	