User Permissions in Litera Transact

After creating a deal, the owning firm builds the working group of all the participants who will collaborate in the deal. This working group can include internal team members from the owning firm, external organizations and members of those organizations, and other individuals. This guide explains the different permissions available for each type of participant.

When you add participants to the working group, you assign them permissions to determine which elements of the deal they can access and which actions they can take. You assign a **user role** to team members within your law firm, and you set **permissions** for the roles you create to determine the permissions for external collaborators.

Permissions for external collaborators are set for the role

Participants are grouped into "roles" to help organize the working group. For example, in an M&A deal you may want to have a "Purchaser" role that includes both the buying organization and the law firm representing that organization, and a "Seller" role that includes the participants on the selling side. Alternatively, you may want to group law firms into a different role to enable different permissions to be set.

When you create a new deal, your law firm is automatically added as an organization to “Role 1” (or the name you entered for **Your Organization’s Role** when creating the deal) in the working group list. You can add more organizations or individuals to your organizations's role or you can add separate roles to organize outside collaborators.

Permissions are set per role and apply to all external collaborators in the role – but not to internal team members of the owning firm. External collaborators added to a role after the permissions are set will inherit the role permissions.

User roles for internal team members

Team members within your law firm can have different permissions depending on their level of responsibility. The four user roles available only to your team members are listed below:

- The **System Admin** role has access to organization settings to set up and manage firm-wide third-party integrations. They can also create deals and manage all aspects of their own deals.
- The **Firm Admin** role has access to all deals but no access to organization settings. They can create deals and manage all aspects of a deal. Firm admins are added automatically to every deal.
- The **Full Admin** role combines the permissions of the **System Admin** and the **Firm Admin** roles. They 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.
- The **Standard User** role has access to the deals they are participating in and they can manage all aspects of their own deals. They can also create deals.
- The **Associate User** role has access to the checklist and signature features but read-only access to some areas of Litera Transact. They can’t create a deal or change the working group list, but can edit and change other areas of a deal.

As you add team members to the working group, you select their user role. This is their user role across Litera Transact, not just for a deal.

Note: You can only assign roles at your level or lower. For example, a Standard User can only add Standard or Associate Users and not a Firm Admin, System Admin, or Full Admin. The **System Admin** role is the only role that can assign a user (or themselves) a **Full Admin** role.

The permissions for each user role in a licensed organization are summarized below:

Note: Licensed organizations are those organizations with their own paid Litera Transact account.

Firm Admins and Full Admins are added into EVERY deal automatically so can access every deal. System Admins, Standard Users and Associate Users can only access deals to which they have been added as participants.

Area in Transact	System Admin	Firm Admin	Full Admin	Standard User	Associate User
Deals	Create deals, access deals they are invited to	Create deals, access all deals	Create deals, access all deals	Create deals, access deals they are invited to	Access deals they are invited to
People	Access, add/edit	Access, add/edit	Access, add/edit	No Access	No Access
System Admin	Access, edit	No Access	Access, edit	No Access	No Access

Within a deal:

- Firm Admins and Full Admins have access to all functionality in all deals.
- System Admins and Standard Users have access to all functionality in the deals they are invited to.
- Associate Users have limited access to deals they are invited to, as follows:
  - **Activity Log:** Access to all functionality.
  - **Working Group List:** View only.

  Note: Associate Users can create roles, and delete roles (that don't have any organizations or users), but they cannot set role permissions.

  - **Data Room:** Access to all functionality.
  - **Checklist:** Access to all checklist functionality available with Edit mode set to Off. No access to the Edit mode toggle or any functionality available with Edit mode set to On.

  Note: Additionally, Associate Users cannot access the import checklist functionality.

  - **Approvals:** No access to **Manage** tab. Access to **Approve** tab if they have been asked to approve an item.
  - **Signatures:** Access to all functionality.
  - **Closing Books:** Access to all functionality.
  - **Deal Settings:** No access.

Permissions for external collaborators

Collaborators outside of your law firm (external collaborators), such as your client, or opposing counsel can be invited to access the deal in the secure Litera Transact platform, allowing them to work jointly on a task or view real-time status updates on deal progress. Collaborators can be added to an “organization” or as an “individual” not associated with an organization.

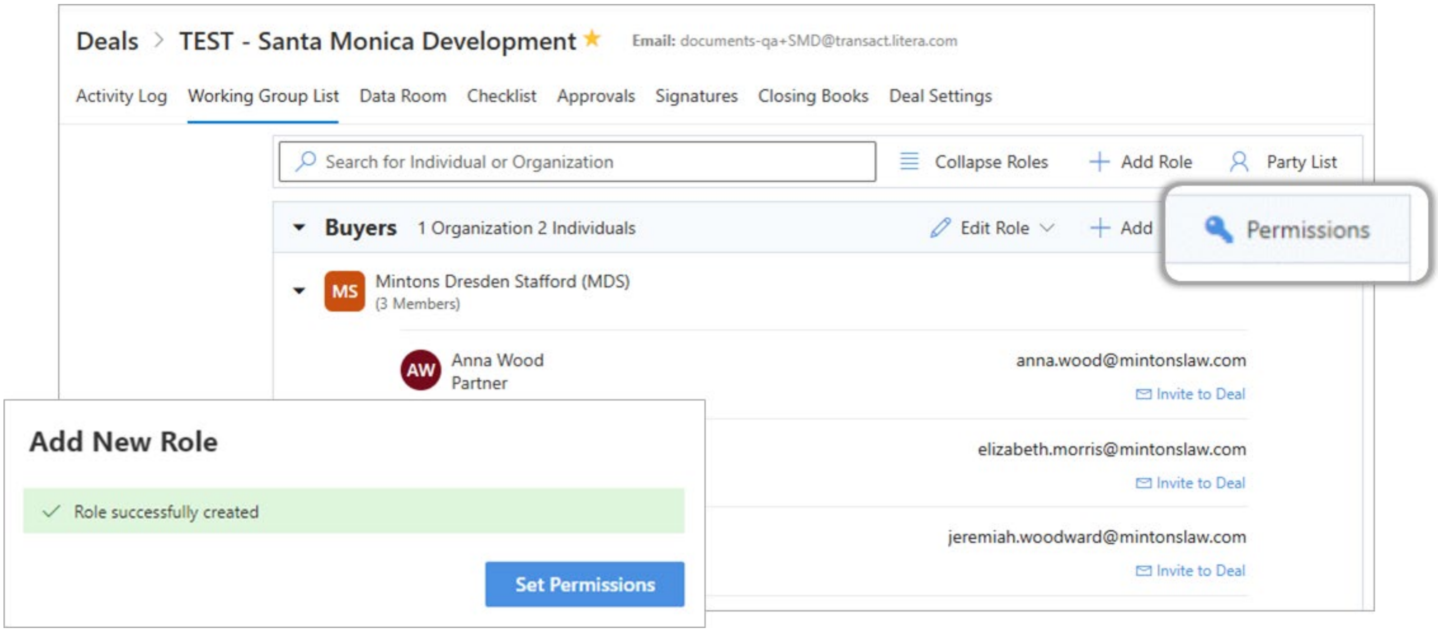
Since the release of Litera Transact 4.17 in February 2023, you can now configure permissions for external collaborators on a deal-by-deal basis. Permissions are set per role in the working group list: any external organization or individual added to a role will inherit the permissions defined for that role.

Some important points to note:

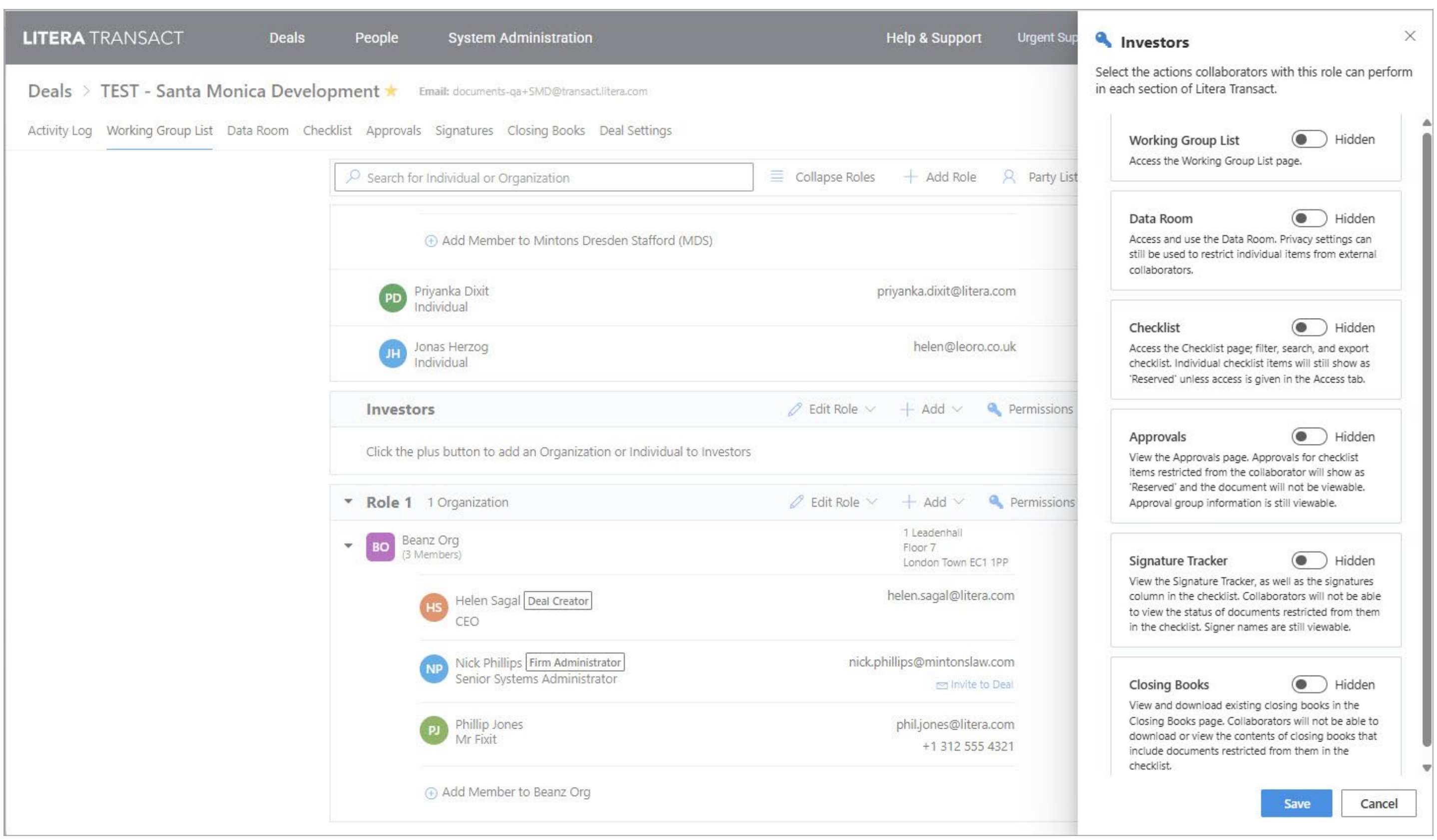
- If you don't set permissions when creating a role, all permissions will be set to "off". Any external collaborators added to the role will not be able to access any area in the deal.
- Permissions do not apply to the owning law firm. For example, you may add external collaborators to the same role as your law firm. Any permissions set for that role will apply to those external collaborators but team members from your law firm will have the permissions associated with their user roles - System Admin, Firm Admin, Standard User or Associate User.
- External collaborators added to more than one role will have the more permissive permissions. For example, if a user is in Role A and Role B, and access to the checklist is off in Role A but on in Role B, the user will have access to the checklist.
- When an external collaborator has access to the checklist, you will still need to give them access to checklist items (from the **Access** tab in the checklist details panel). Individual checklist item access is OFF by default.
- When an external collaborator has access to the data room, you will still need to give them access to data room items (from the **Access** tab in the data room details panel). Individual data room item access is OFF by default.

Configuring permissions

You may configure permissions when adding a role or at any time using the **Permissions** button in the working group list.



1. Click **Permissions** or **Set Permissions**. A permissions panel slides out on the right.



2. Select which areas of Litera Transact the external users belonging to the role can access and use.

Permission	Description
Working Group List	When set to **Visible**, external users have read-only access to the Working Group List page.
Manage Working Group List	When **Working Group List** is set to **Visible**, you can select this option to give external users the ability to add, edit, and delete roles, organizations, individuals, and parties. External collaborators cannot make any changes to the owning firm role or edit permissions.
Data Room	When set to **Visible**, external users can access and use the data room. Individual data room items will still show as 'Reserved' unless access is given in the **Access** tab.
Checklist	When set to **Visible**, external users can access the Checklist page where they can filter, search, and export the checklist. Individual checklist items will still show as 'Reserved' unless access is given in the **Access** tab. **Note:** If you add a second checklist to the deal, permissions are set separately for each checklist.
Edit Checklist	When **Checklist** is set to **Visible**, you can select this option to give external users the ability to use the Edit On/Off toggle and add, edit, delete, and move checklist items, and edit the signature required toggle.
Edit Status	When **Checklist** is set to **Visible**, you can select this option to give external users the ability to change status labels for checklist items. Users can only bulk assign status notes if **Edit Checklist** is also selected.
View Status Notes	When **Checklist** is set to **Visible**, you can select this option to give external users the ability to view all status notes for checklist items.
Edit Status Notes	When **View Status Notes** is selected, you can select this option to give external users the ability to add status notes and edit and delete their own status notes. External users can always delete their own status notes if **View Status Notes** is selected.
View Documents	When **Checklist** is set to **Visible**, you can select this option to give external users the ability to view and download checklist documents.
Add Documents	When **View Documents** is selected, you can select this option to give external users the ability to add local documents and delete documents they have uploaded.
View 'Assigned To'	When **Checklist** is set to **Visible**, you can select this option to give external users the ability to see who's been assigned to a checklist item in the **Assigned To** column in the checklist. Collaborators cannot filter the checklist by the **Assigned To** column unless **Edit 'Assigned To'** is selected.

Permission	Description
Edit ‘Assigned To’	When **View ‘Assigned To’** is selected, you can select this option to give external users the ability to filter the checklist to display only items that are assigned to a selected individual, organization or role, as well as access the **Assigned To** tab in the details panel where they can add/edit parties responsible for completing an item.
View [custom column]	When **Checklist** is set to **Visible** and a custom column has been added to the checklist, you can select this option to give external users the ability to see the custom column in the checklist.
Edit [custom column]	When **View [custom column]** is selected, you can select this option to give external users the ability to add text to the custom column in the checklist or via the details panel.
Approvals	When set to **Visible**, external users can view the Approvals page to view the list of approval requests and their statuses, and download the approvals report. Collaborators cannot view approvals for items restricted from them in the checklist. The item will show as 'Reserved' and the document will not be viewable. Approval group information is still viewable.
Signature Tracker	When set to **Visible**, external users can view the signature tracker and the signatures column in the checklist. Collaborators cannot view the signature status of documents restricted from them in the checklist. Signer names are still viewable.
Closing Books	When set to **Visible**, external users can view and download existing closing books in the Closing Books page. Collaborators cannot download or view the contents of closing books that include documents restricted from them in the checklist.

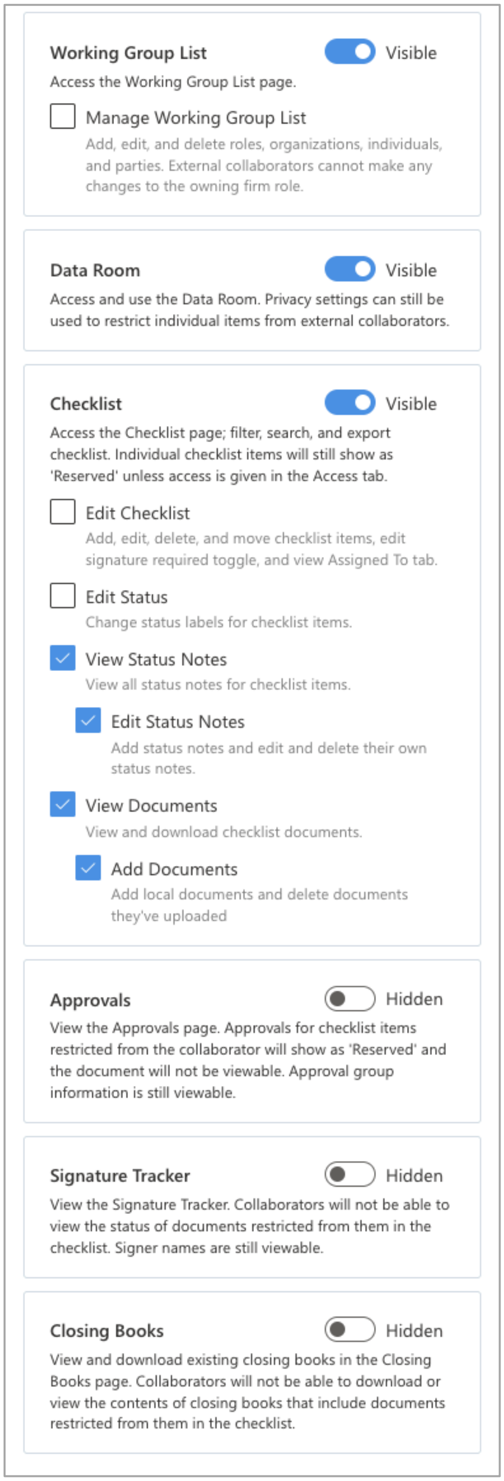
Note: External collaborators cannot add custom checklist columns regardless of their permissions, but they can view and add text to custom columns if their role is given permission.

Note: External collaborators cannot access the activity log.

3. Click **Save**.

Existing deals

Existing external collaborators in existing deals will keep the default permissions in place before the release of Litera Transact 4.17 (February 2023), unless you change them. These permissions are shown in the new permissions panel as follows:



Note: Existing external collaborators in existing deals will **not** have access to the **Assigned To** tab in the checklist details panel until the **Edit 'Assigned To'** option is selected for their role.

Email notifications

When the permissions set for the external collaborator’s role prevent access to items, the external collaborator will not receive any updates for those items in email notifications, even if the external collaborator has been given access to an item in the **Access** tab.

External collaborators receive email notifications of deal activity when permissions are set as follows:

Activity	Permissions required
Checklist item created	Checklist = Visible
Document version uploaded to checklist item	Checklist = Visible View Documents = Selected
Related document uploaded to checklist item	Checklist = Visible View Documents = Selected
Status note added to checklist item	Checklist = Visible View Status Notes = Selected
Data room item created	Data Room = Visible
Document uploaded to data room item	Data Room = Visible
Data room item marked as reviewed	Data Room = Visible

For external collaborators to receive email notifications with these permissions, users will still need to give them access to checklist items (from the **Access** tab in the Checklist page) and data room items (by clicking **Edit Privacy** for the item in the Data Room page).