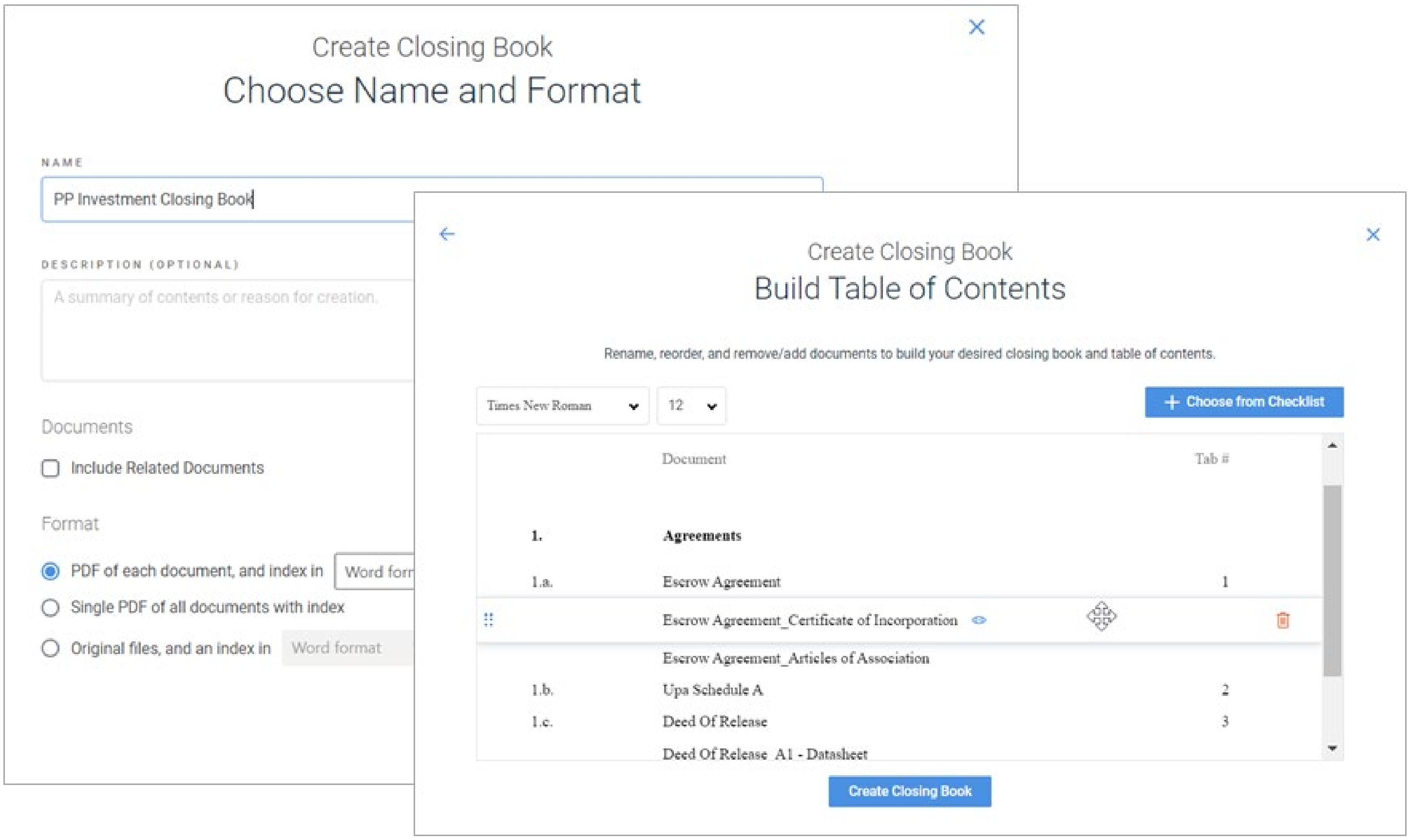
Enhancements

Related documents in closing books

As the final stage in the deal process, firms can automatically create bespoke closing books in Litera Transact much faster than using manual methods. With this release, the closing book also lets you include related documents from the checklist.



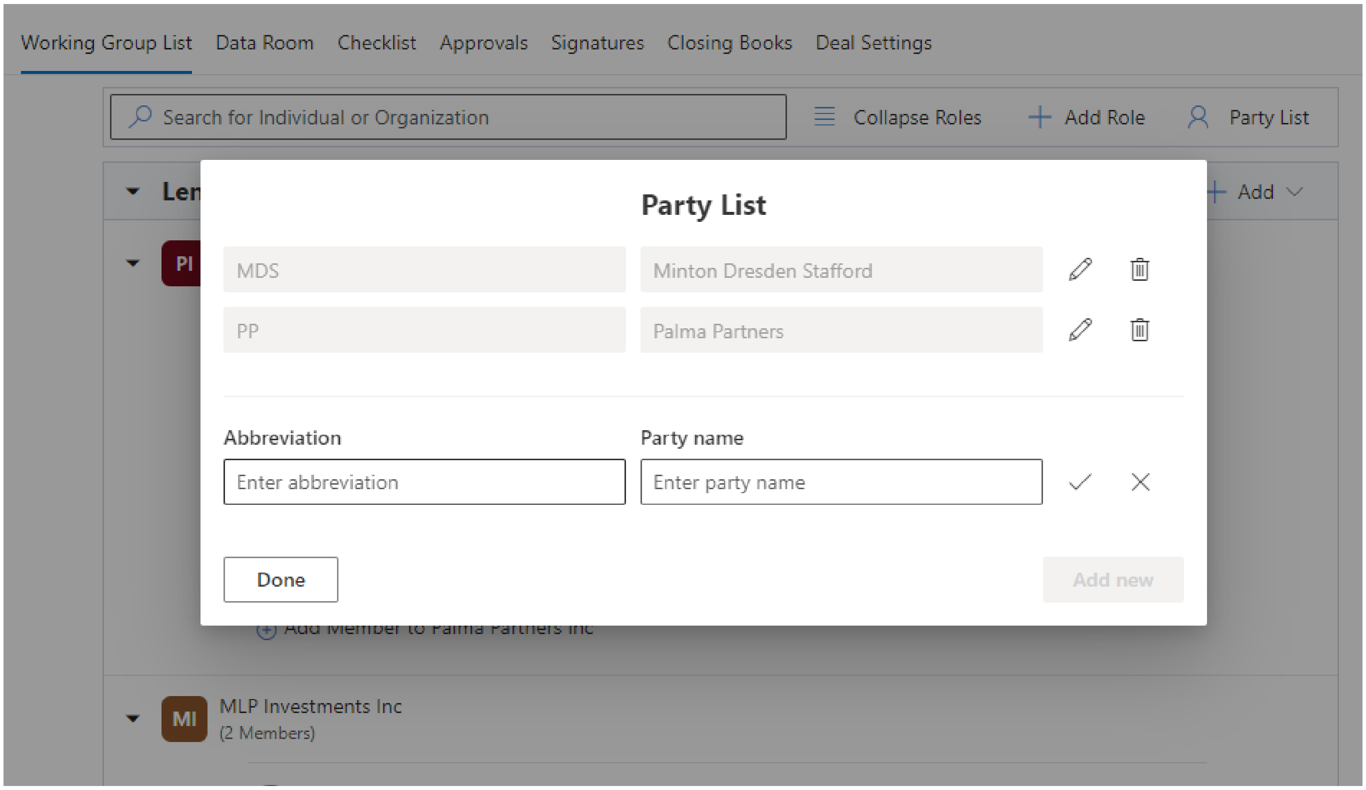
Improvements for exported checklist

To improve the user experience, several enhancements have been made to the exported checklist. These include:

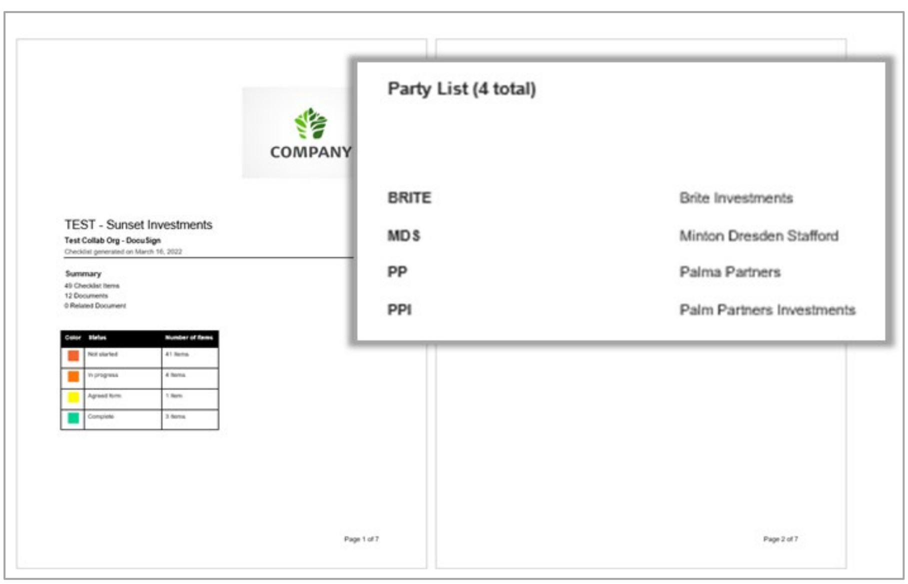
- The footer includes the page number and total number of pages, for example, Page 1 of 10.
- Columns in the checklist are better spaced to accommodate the information provided.
- Top level checklist items are shown in a shaded row to better differentiate between items.
- A related document count is included in the first page summary.

Add a party list to a deal

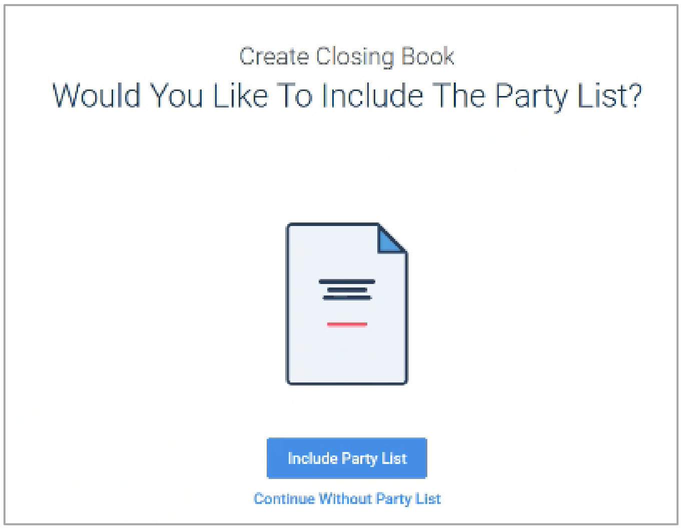
Users can now include a list of parties in the exported checklist and in closing books. A party list lets users list all parties to the deal, providing abbreviations for ease of reference.



The party list is then included at the beginning of the exported checklist.

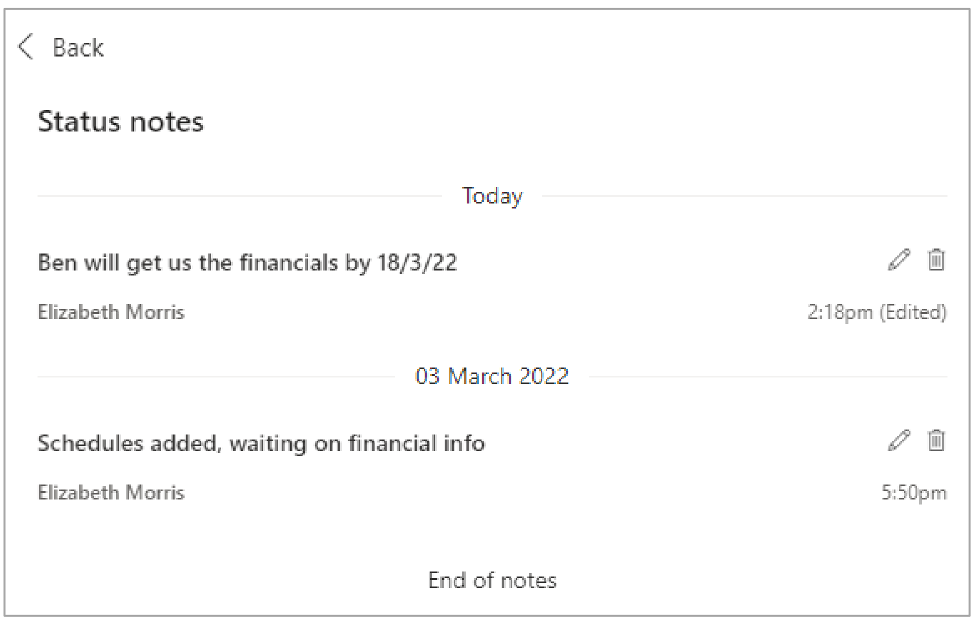


When creating closing books, users can select whether to include the party list.



Edit and delete status notes

An historical record of status notes was introduced in the last release to track progress of checklist items and allow collaborative commenting among users. We have enhanced the status note functionality to enable users to edit and delete their status notes.

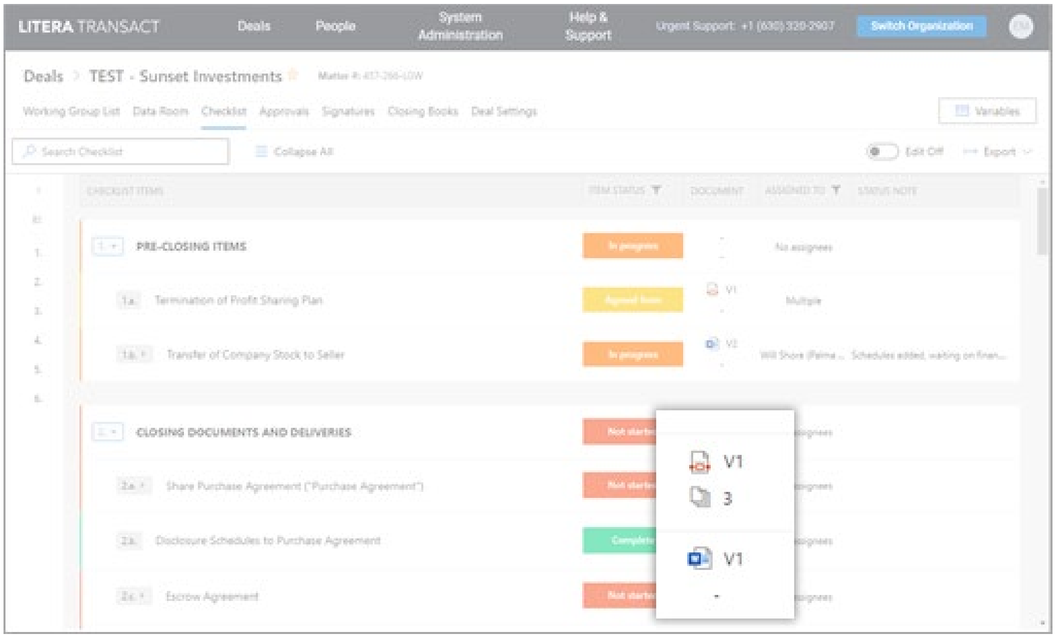


Users can only edit and delete their own status notes. The timestamp from the original status note will remain but the label edited will indicate that a status note has been edited.

Note: Deleting a status note will remove it from the checklist but there is still a record of it in the audit logs.

Icon in checklist for related documents

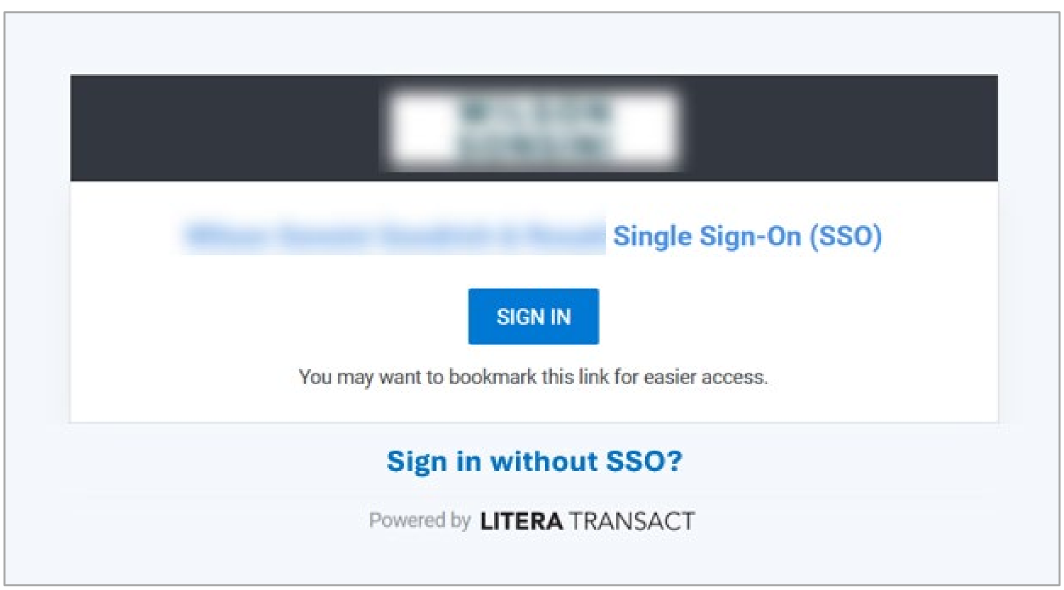
To give users a complete picture, we’ve added a visual indicator in the checklist to show that an item has related documents.



Users can see at a glance how many related documents have been added to an item.

SSO login page update

The SSO login page now includes the **Sign in without SSO** link to enable external collaborators to navigate to the regular Litera Transact login page. Sometimes, when SSO is set up for a firm, external collaborators are given the wrong link - meaning a link to an internal user’s login page.

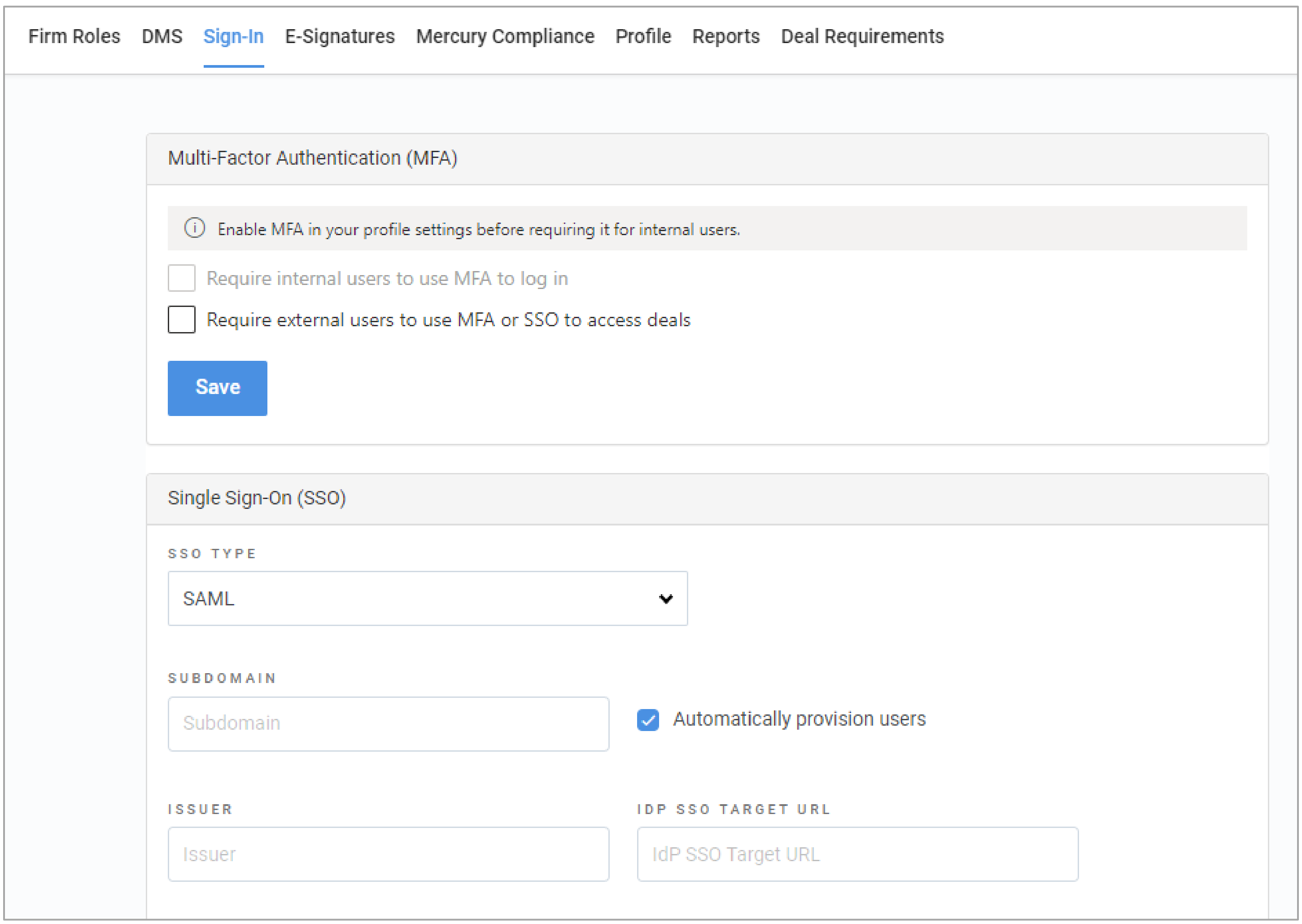


Now if external collaborators find themselves here, they can easily navigate to the general Litera Transact login page.

Note: Internal members of an organization with SSO enabled will still need to log in via SSO.

Require multi-factor authentication

We've added another layer of protection to the Litera Transact platform. Admins can now force external collaborators invited to a deal to provide additional authentication to log in to Litera Transact. With this option enabled, external collaborators who do not have their own Litera Transact accounts with SSO set up, must go to their personal settings and authenticate using multi-factor authentication.



When SSO is not set up for a firm, admins can also require MFA for internal users. The new settings have been combined with the SSO settings in the **Sign-In** tab in the Admin Portal.

Audit log updates

As of this release, adding, editing, and deleting parties in the party list are added to the audit log, so firms can track this history of activity.

Additionally, checklist item reference numbers are included in the description field in the audit log. The reference number used is the number of the item at the time of the change.

Note: Checklist item reference numbers are not included for item deletion events and status note deletion events.

Issues Fixed

- When the checklist item description was very long, the **Approve** button was sometimes hidden. This issue has now been fixed and long descriptions have scroll bars so the **Approve** button is always visible.
- Various performance and stability improvements.