

Enhancements - 4.15.0

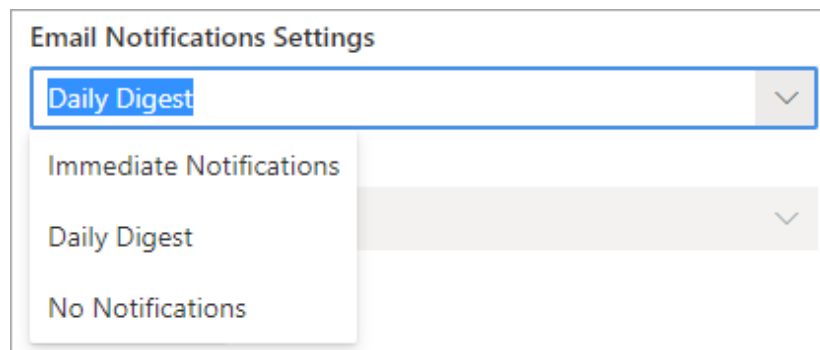
DocuSign authentication upgrade

We have updated our Litera Transact/DocuSign integration to include DocuSign's new authentication requirements. Admins will need to re-authenticate their DocuSign account before October 4th, or their firm will no longer be able to send signature packets through Litera Transact.

For a description of the steps required to update the Litera Transact/DocuSign integration, refer to the *Litera Transact Admin Guide*.

Send immediate notification on user activities in a deal

Rather than receiving a daily digest email once a day, users can now choose to receive immediate notifications as soon as certain activities are performed in any of the deals the user is participating in.



An email notification is sent when any of the following events take place in the data room and checklist for the items that the user has access to:

- Checklist item created
- Primary document uploaded (notification for each version uploaded)
- Related document uploaded
- Status note added
- Data room folder added
- Data room document uploaded
- Review completed for data room item

A single email is sent for bulk activities, such as adding multiple files in the data room, and adding multiple related documents/sections, or files in the checklist.

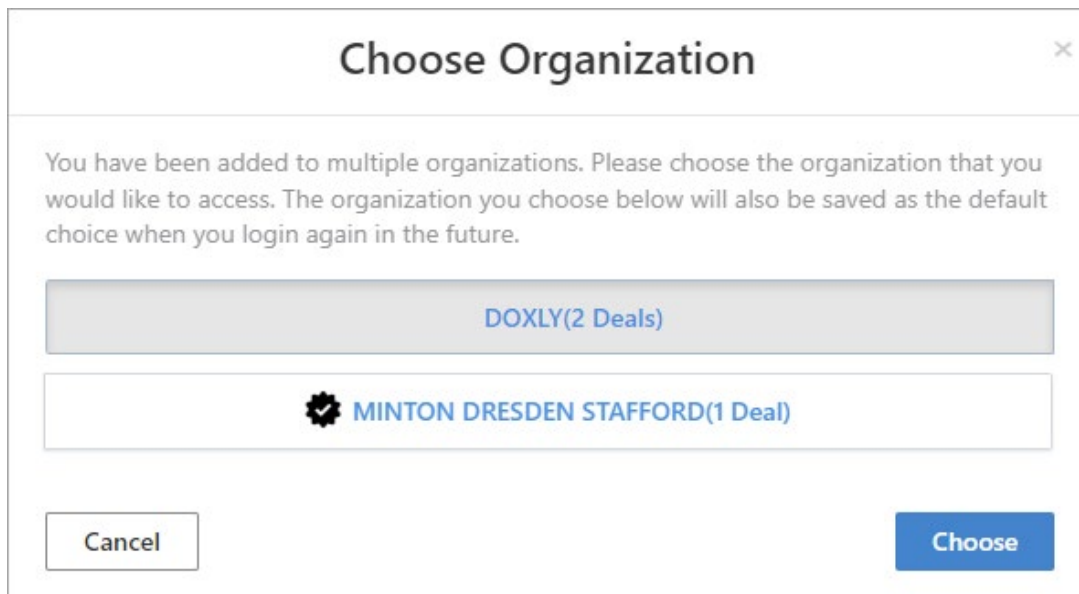
Checklist enhancements

We've made some small changes to the checklist to make the user experience more seamless:

- To improve navigation on long checklists, we've increased the width of the checklist navigation when in collapsed mode to show four characters.
- Users can now edit checklist items when the checklist is filtered so they can add new items or delete items without having to first remove the filter.
- The left-side navigation will no longer filter checklists to the selected section, but will let users quickly navigate to the correct area of the checklist.

Add badge to show licensed organization

When a user switches between organizations, they can see at a glance which is their licensed organization.



Improvements to closing books

To improve the look and feel of closing books, which users often send to clients, we've made the following enhancements.

Truncating names in closing books


In the closing book zip file, file names can be up to 200 characters. Longer file names will be truncated at the beginning. Litera Transact will truncate the file name to 199 characters and add an underscore at the beginning so that the file name plus the underscore is the maximum 200 characters.

Note: In the closing book index, file names are not truncated.

In the closing book zip file, “[tab number]_R#” is prepended to the related document name. For example, 7_R1_[related document name]. If there is another related document for the same checklist item, it will be called 7_R2_[related document name]. When related document names are truncated, it is indicated with a double underscore after the “[tab number]_R#”. For example, 1_R1_nottruncatedrelatedfilename and 1_R1__truncatedrelatedfilename.

Editing related documents in the closing book index

Users can now edit document names in the closing book index to a maximum of 200 characters. This provides the following benefits:

- Users can update names to suit the requirements of the particular closing book.
- Users are notified by a  icon when a document name exceeds the 200-character limit so they can shorten the name to avoid automatic truncation by Litera Transact during the closing book creation process.

Build Table of Contents

Rename, reorder, and remove/add documents to build your desired closing book and table of contents.

Indicates the name exceeds 200 characters. If you shorten the name here, the shortened name appears in the index and as the file name in the closing book. Names longer than 200 characters will appear in the index but the file name in the closing book will be truncated from the beginning.

Times New Roman 12

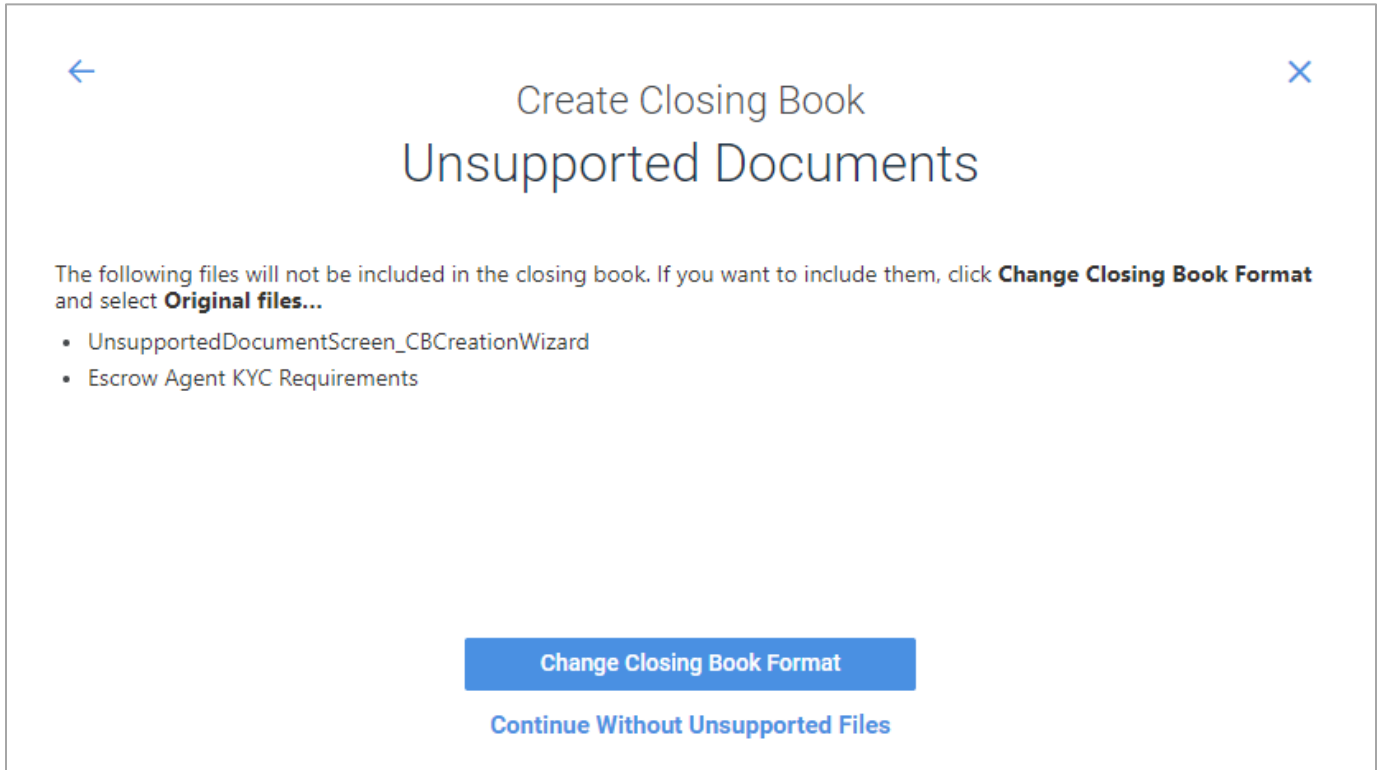
+ Choose from Checklist

2.c.	Escrow Agent KYC Requirements	4
⋮	<div style="display: flex; align-items: center;"> ⓘ <div style="font-size: 0.8em; color: #4F81BD;"> Minutes from the meeting with E Morris and A Wood and N Phillips and J Woodward and C Jones and J Stafford and J Herzog discussing the document requirements for the initial preparation of statement of work </div> </div>	<div style="display: flex; align-items: center; justify-content: center;"> 👁 🗑 </div>
2.d.	Employment Agreement	5
3.	POST-CLOSING DOCUMENTS AND DELIVERIES	

Any changes to document names only change the document name in the closing book index and the closing book zip file – they do not change the document name in the checklist.

Indicating which files won't be included in the closing book

Certain types of documents cannot be converted to PDF (password protected documents, movies, etc.) and these documents do not get included in a single PDF closing book or a closing book with PDFs of each document. We now make it clear to users when files cannot be included in a given format and give them the option to change their selections.



Users can opt to create a closing book keeping the files in their original format or create a closing book without the unsupported files.

Additional enhancements

- The PDF index of a closing book includes hyperlinks to the corresponding document in the closing book.
- An address placeholder can now be included in the closing book index. Users can choose to **Include Logo and Address in Index** when creating a closing book.
- Performance improvements so users can work on closing books for long periods of time without the risk of the process timing out.
- Page numbers in the closing book index now indicate the total number of pages, for example, page 1 of 4.

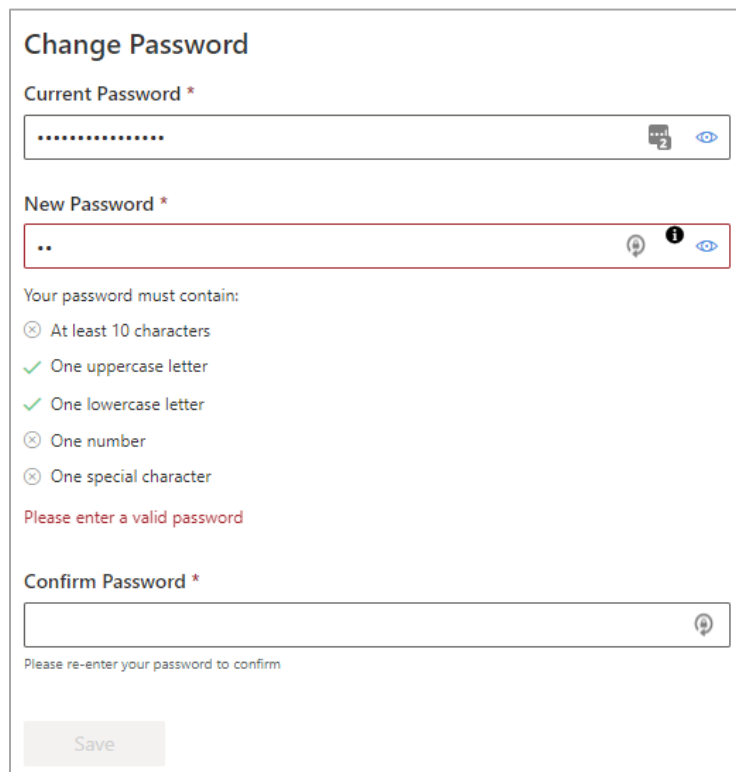
Download approval report

To reduce the number of emails users receive, users can download the approvals report directly from the application rather than receiving it by email.

Note: If there are more than 500 items in the report, we will still send it by email.

Password requirements presentation

To make password requirements clearer, we show them as a list below the password fields. Users can easily see if their password meets the requirements and if not, what they need to change.



The screenshot shows a 'Change Password' form with the following elements:

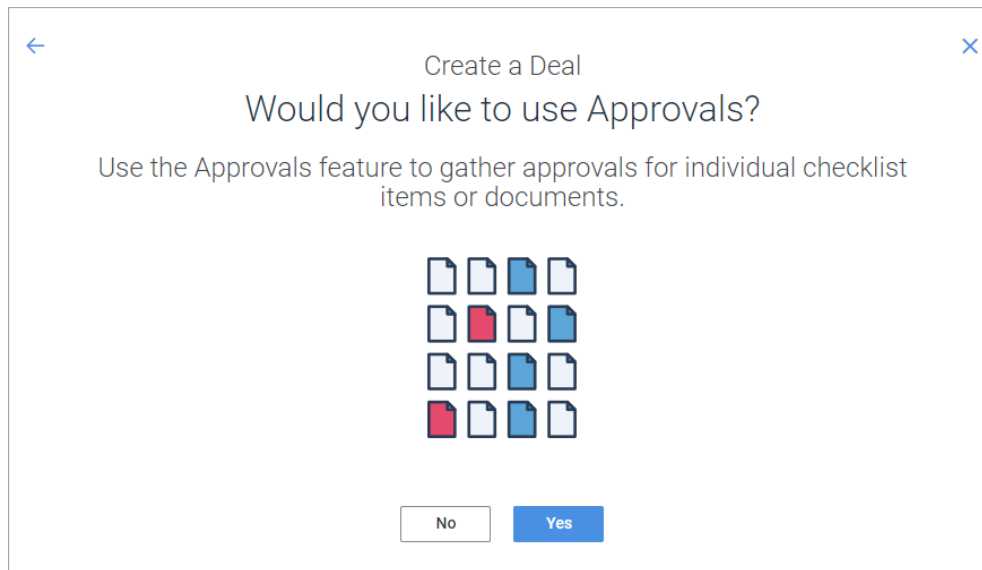
- Current Password ***: A text input field with a masked password (dots) and a toggle icon (eye with slash).
- New Password ***: A text input field with a masked password (dots), a tooltip icon (speech bubble with 'i'), and a toggle icon (eye with slash). The field has a red border, indicating an error.
- Your password must contain:**
 - At least 10 characters (❌)
 - One uppercase letter (✅)
 - One lowercase letter (✅)
 - One number (❌)
 - One special character (❌)
- Please enter a valid password**: A red error message.
- Confirm Password ***: A text input field with a tooltip icon (speech bubble with 'i').
- Please re-enter your password to confirm**: A small instruction below the confirm field.
- Save**: A button at the bottom of the form.

Clearer UX for users without permission to create deals

Users without permission to create a deal, for example, associate users, were only shown a message after clicking **Create Deal**. Now we've disabled the **Create Deal** button and provided a tooltip so users know beforehand that they are unable to create a deal.

Enable approvals when creating deals

Previously, the approvals functionality which is used to monitor and record parties' approval/sign-off on documents and conditions precedent, could only be enabled from the **Deal Settings > Deal Details** page. Now, users can enable the approvals functionality when creating a deal.



Additionally, users no longer select whether to include a data room when creating deals. Data rooms are turned off by default and users can include a data room from the **Deal Settings > Deal Details** page.

Issues Fixed

4.15.1

- When creating a closing book using **PDF of each document, and index in PDF format** or **Original files, and index in PDF format**, some of the related document hyperlinks in the index were not linking to the document in the closing book zip file. This issue has been fixed and hyperlinks in the closing book index correctly link to the corresponding related documents in the closing book.

Note: There was not a problem when creating closing books with the index in Word format.

4.15.0

- A checklist was failing to export due to vertical tab characters in status notes. This issue has been fixed and Litera Transact can successfully export checklists when status notes include vertical tab characters.

Release Notes

Version 4.15.1

- When collating documents with Cambria font, the font was changed to Arial. This issue has been fixed and Litera Transact now supports Cambria font.
- Single-spaced text in the footer of a signature was showing as double-spaced in the preview and when the signature page was printed. This issue has been fixed and the footer text stays as single-spaced on the signature page.
- When a closing book failed to generate due to problems in one or more files, it wasn't easy to quickly understand which file caused the problem. This issue has been fixed and Litera Transact highlights the problematic files.
- After adding a paragraph to a signature page, the text was showing as single-spaced during editing. However, the text was double-spaced in the preview and when the signature page was printed. This issue has been fixed and the paragraph text remains as single-spaced on the signature page.
- After cloning a deal, updating signer information in the new deal was also updating the original deal. This issue has been fixed and updating signer information in a cloned deal will not update the signer block in the original deal.
- Some users were receiving multiple 'password expires' emails. This issue has been fixed and password expiry reminder emails are only sent once to users with a Litera Transact account.
- Exporting deal data was failing when file names included non-English letters. This issue has been fixed and Litera Transact successfully exports deal data when files have non-English characters in their names.
- A 'page not found' error was displaying when clicking a link in a specific sent signature packet. This issue has been fixed and clicking the link takes the signer to the packet in DocuSign which can be signed as expected.
- Bulk sending of signature packets in a particular deal was including some documents from another deal. This issue has been fixed and sending signature packets to all signers at the same time sends packets correctly with the correct documents included.
- Various performance and stability improvements.

Known Issues

- After sending a signature packet to a particular signer to be signed with DocuSign, attempting to send additional signature packets to the same signer will fail. This is a known issue which we expected to be fixed by our upgrade to version 2.1 of the DocuSign eSignature REST API in the 4.15 release of Litera Transact. Unfortunately, the upgrade did not provide a fix, so we are prioritizing work to fix this issue as soon as possible.

In the meantime, a workaround is to void the initial signature packet, then resend all pages together in a single packet,.