

CoCounsel Release Notes: 6/28/23

Educational resources:

In addition to the CoCounsel User's Guide (available [here](#)), you can also access articles about using CoCounsel [here](#), access video tutorials [here](#), and sign up for a weekly Onboarding Webinar on how to best utilize CoCounsel [here](#).

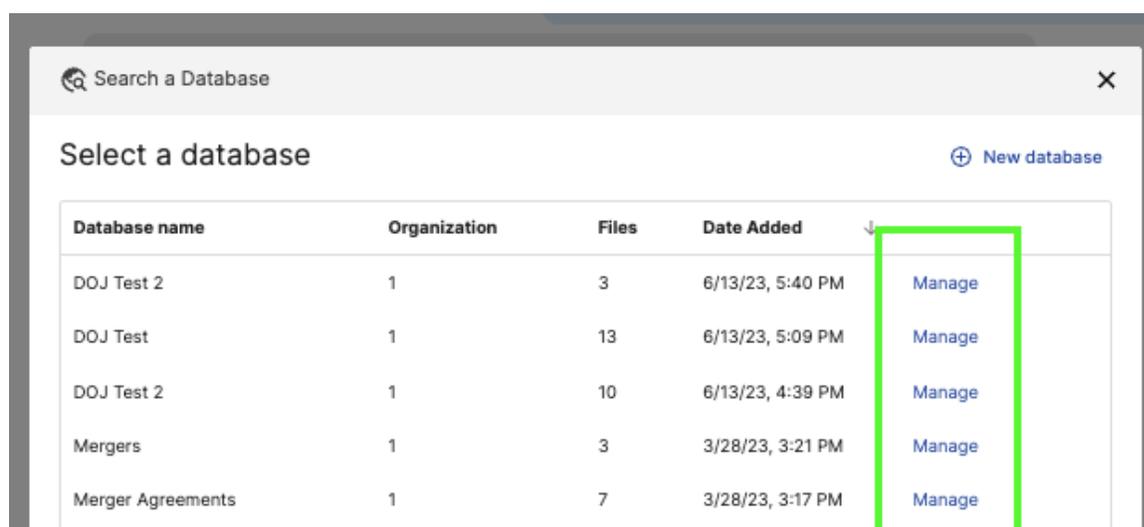
Forthcoming Improvements:

This section highlights upcoming changes and enhancements to CoCounsel. We will notify you in future Product Updates when these improvements are available to use and changes that occur during development.

Manage databases

You will soon have the ability to manage your database directly from CoCounsel. This will apply to all skills that allow you to make searches in your databases ("Search a database," "Summarize," "Review documents," "Extract contract data," "Contract policy compliance").

Upon launching a database-supported skill and selecting a database, there will be a new column that says "Manage" (shown in the [green](#) box in the screenshot below):

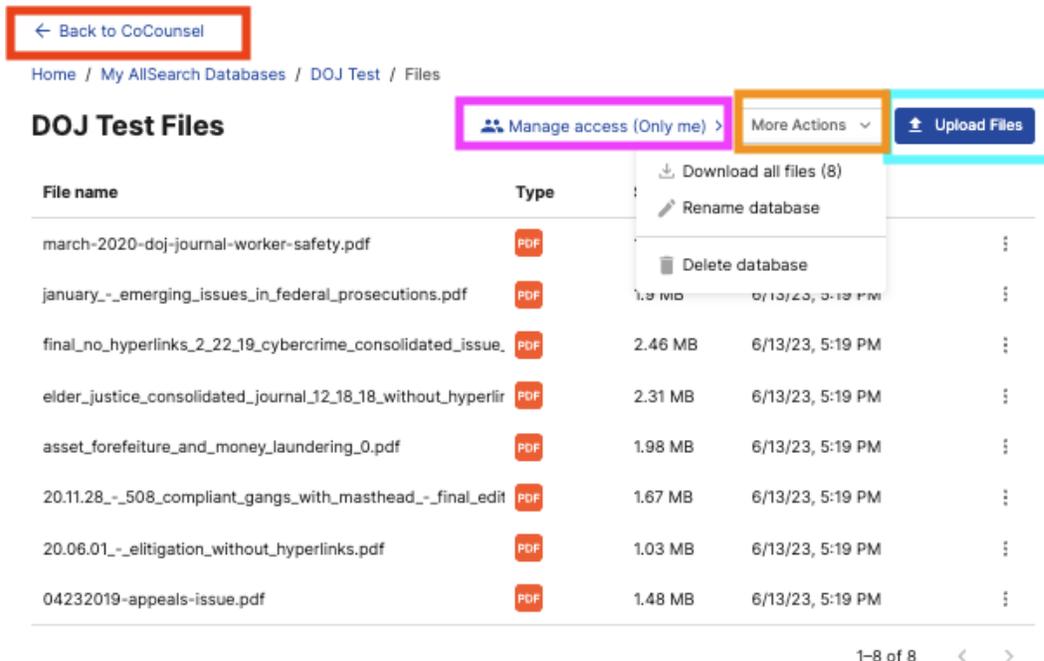


The screenshot shows a window titled "Search a Database" with a search icon and a close button. Below the title is the heading "Select a database" and a "New database" button. A table lists several databases with columns for "Database name", "Organization", "Files", and "Date Added". A new column labeled "Manage" is visible at the end of each row, highlighted with a green box.

Database name	Organization	Files	Date Added	Manage
DOJ Test 2	1	3	6/13/23, 5:40 PM	Manage
DOJ Test	1	13	6/13/23, 5:09 PM	Manage
DOJ Test 2	1	10	6/13/23, 4:39 PM	Manage
Mergers	1	3	3/28/23, 3:21 PM	Manage
Merger Agreements	1	7	3/28/23, 3:17 PM	Manage

Upon clicking “Manage” on a specific database, you will be directed to your database page. From here, you can:

- Upload more files (in the blue box below)
- Rename your database, download files, or delete your database (in the orange box below)
- Manage users to control access to your database (in the pink box below)
- Go back to CoCounsel without losing your place in your search (in the red box below)

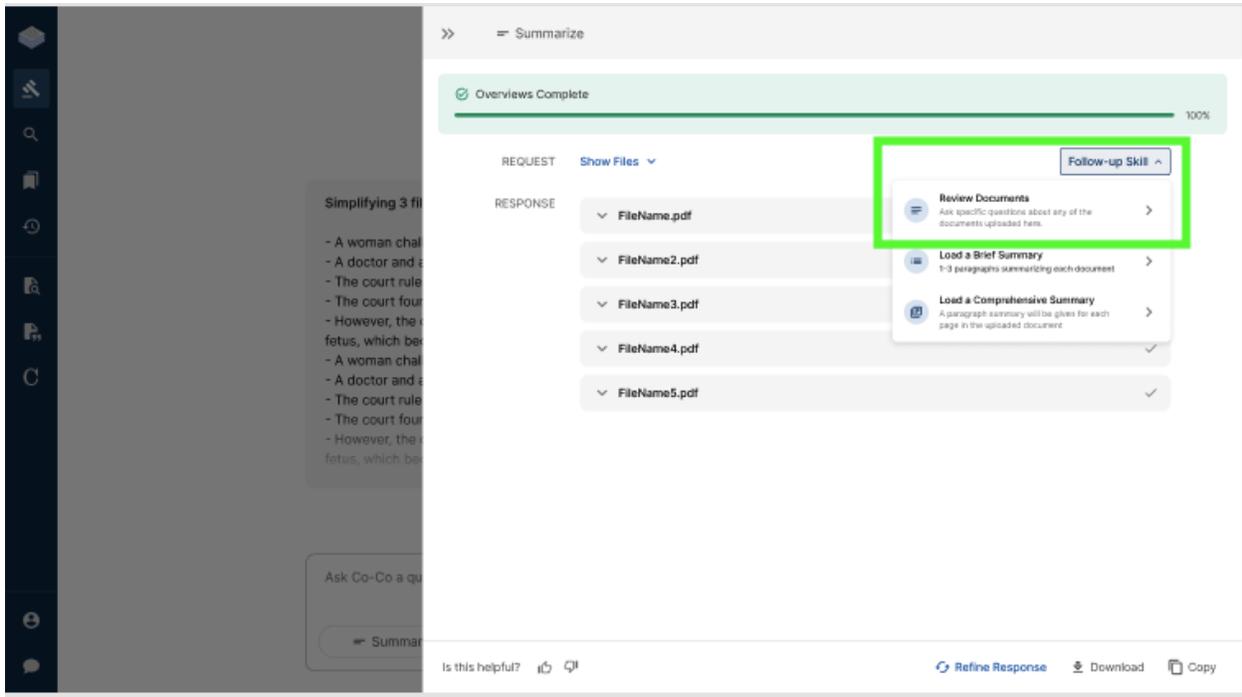


This feature will provide a more seamless experience in managing your databases, allowing you to retrieve and edit your databases without leaving the CoCounsel application.

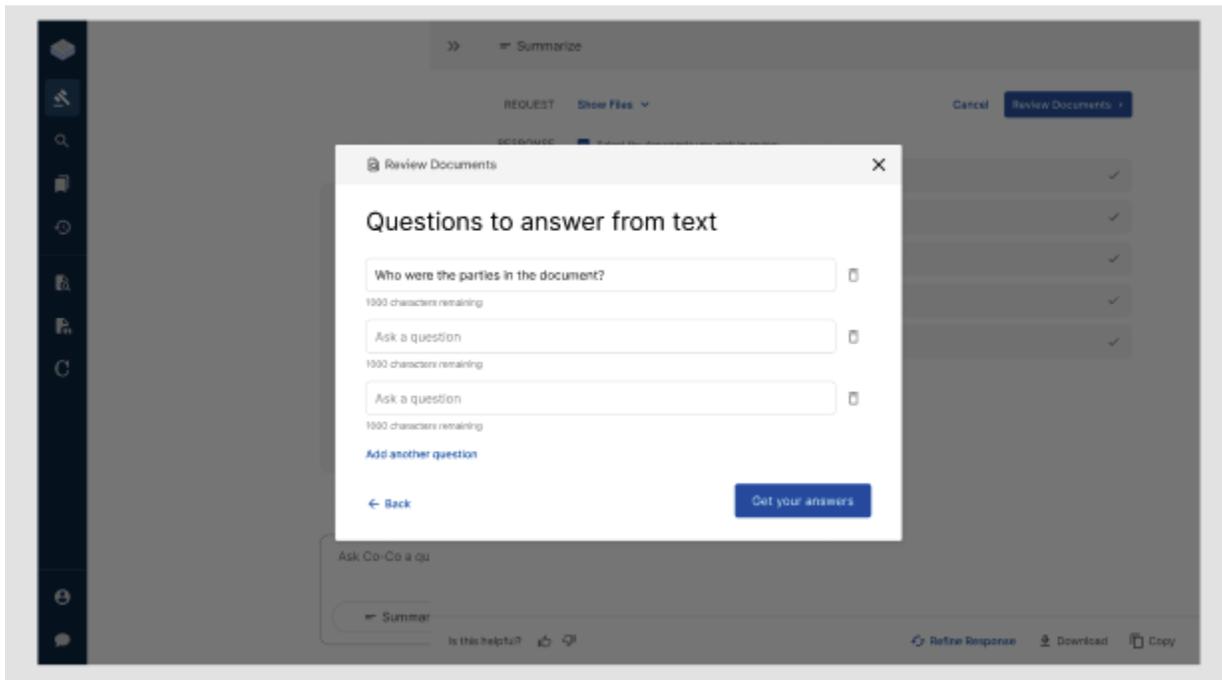
Linked skills from “Summarize”

In the next week, you will be able to run other relevant skills such as “Review Docs” and “Extract Contract Data” from the “Summarize” skill response. As featured in the [5/10 Product Update](#), you can currently run “Summarize” from “Review Documents.”

Upon completion of a query in “Summarize,” there will be a drop-down option (shown in the green box in the screenshot below) to run another skill on your “Summarize” results:



By selecting “Review Documents,” you can immediately trigger the skill and ask queries, shown in the modal below:



Recent Improvements:

Create databases in “Search a database”

The ability to create a database from within the “Search a database” skill is now available. This improvement will save you the extra step of exiting out of CoCounsel and having to create databases in AllSearch, allowing for faster access in uploading documents directly to “Search a database.” Here are screenshots from our test environment:

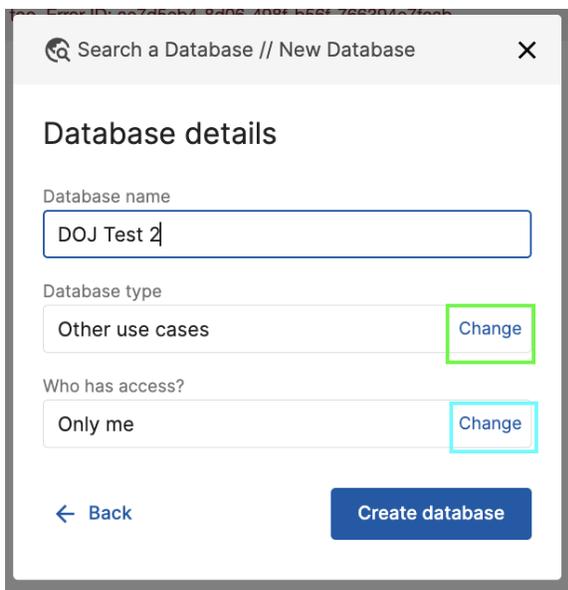
Step 1 (New step): Create a database in “Search a database”

Upon opening “Search a database,” you will see a button to create a new database, shown in the orange box in the screenshot below:



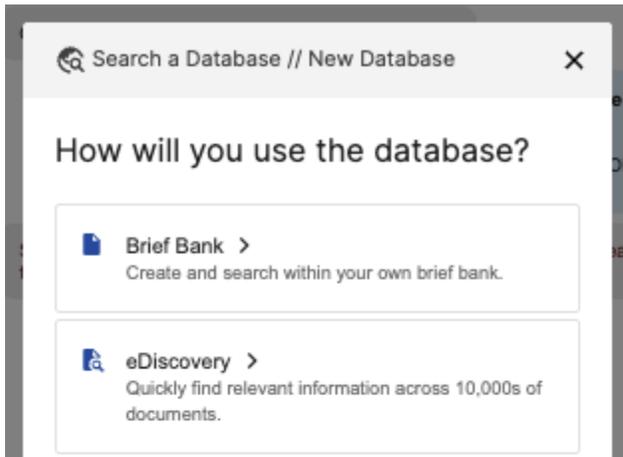
Step 2 (New step): Customize your database

You can then proceed to name your database, select the type, and manage who has access to this database:



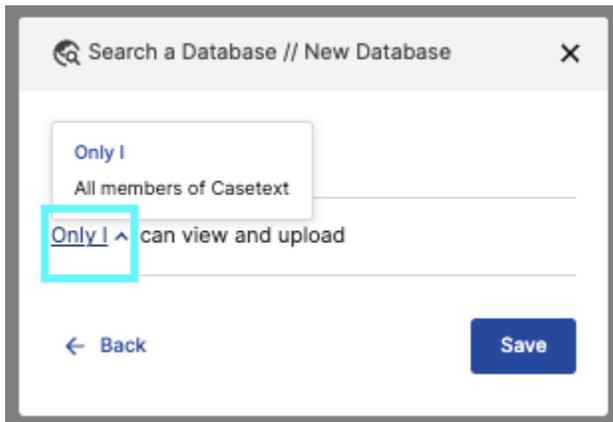
Change Database type:

Clicking on “Change” for “Database type” (in the green box in the screenshot above) will allow you to change the type of database. The screenshot below has been condensed, but options include: Brief Bank, eDiscovery, Contracts, Litigation records, Transcripts, and Other use cases:



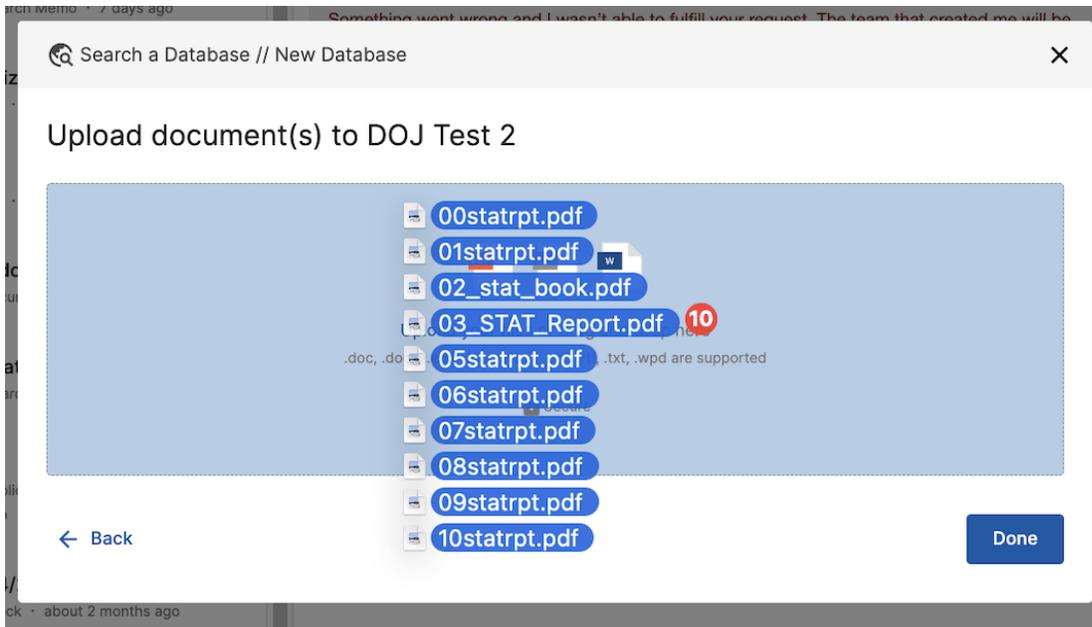
Change Database access:

Clicking on “Change” for “Access” (in the blue box in the first screenshot in Step 2) will allow you to enable access to this database at the individual level, or for your whole firm/organization:



Step 3: Upload files to your database

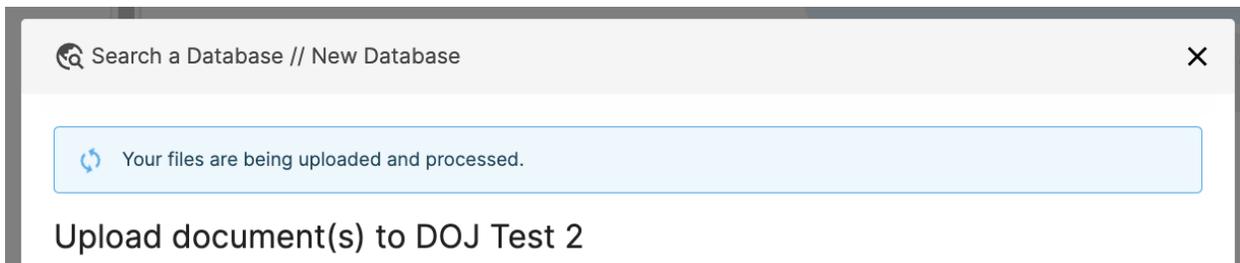
Without exiting CoCounsel, you will be directed to a modal to drag and drop your files where you can directly drag and drop files in the “Search a database” modal, shown below:



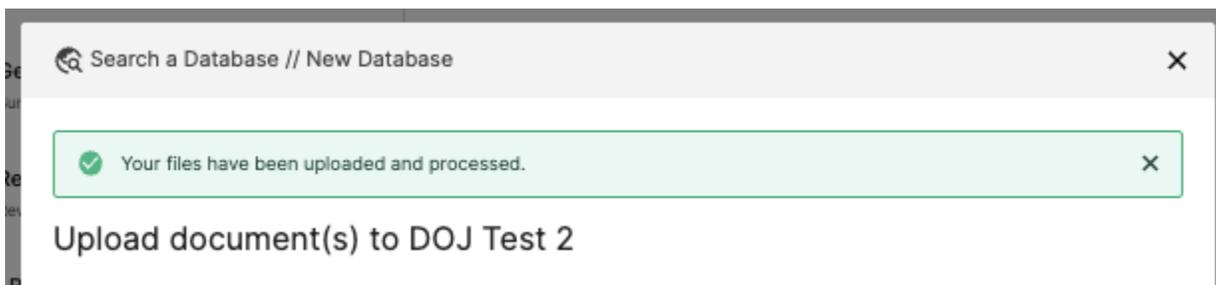
Step 4: Track progress

A colored banner will appear at the top of the modal to help you track the progress of your database.

A **blue** banner indicates that your files are in the process of being uploaded:

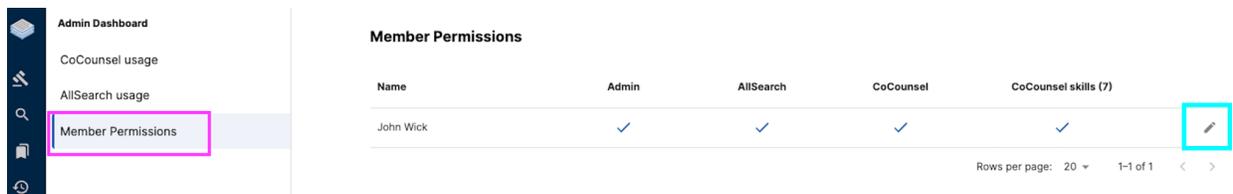


A **green** banner indicates that your files are finished uploading and are ready to use in "Search a database":

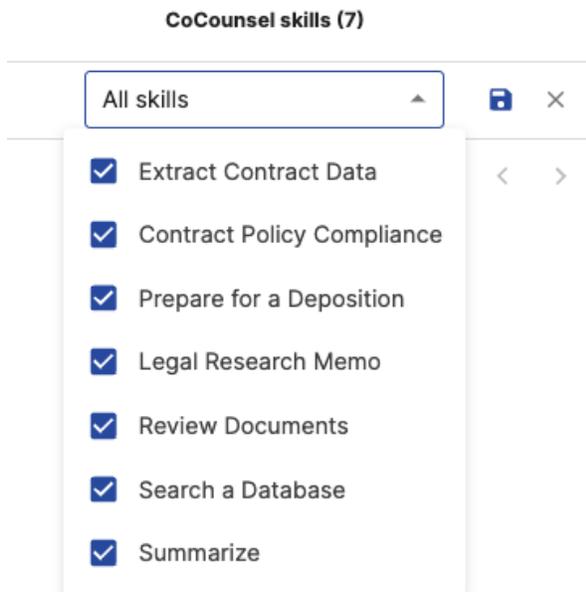


Admin controls - Member permissions - Available for ENT firms only
Member permissions in the Admin Dashboard have been implemented for more security and controls. **If you are an Administrator of your Enterprise firm, you will be able to enable/disable members of your firm to access CoCounsel. Administrators will be able to enable/disable specific skills in the Admin Dashboard.**

By expanding the left-hand sidebar and selecting “Admin Dashboard”, you will see a new section called “Member Permissions” (shown in the pink box in the screenshot below):



By clicking on the edit button  for the member of your organization on the right (shown in the blue box in the screenshot above), here is where you can edit access to CoCounsel and/or AllSearch, and enable/disable access at the skill level:



Enabling access for controlling Member Permissions:

If you are interested in enabling Member Permissions for your organization, please email valerie@casetext.com for more information.