CoCounsel Release Notes: 6/28/23

Educational resources:

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

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):

| 😪 Search a Database | | | | | × |
|---------------------|--------------|-------|------------------|----------|--------|
| Select a database | | | | ① New da | tabase |
| Database name | Organization | Files | Date Added 🛛 🤟 | | |
| 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)

| Back to CoCounsel | | | | |
|--------------------------------------------------------|-------------|------------------|---------------------------------|----------------|
| DOJ Test Files | 🚢 Manage ac | cess (Only me) > | More Actions $\ \sim$ | 1 Upload Files |
| File name | Туре | 🛃 Downle | oad all files (8) e database | |
| march-2020-doj-journal-worker-safety.pdf | PDF | Delete | database | 5 |
| januaryemerging_issues_in_federal_prosecutions.pdf | PDF | םואז ש.ו' | 0/13/23, 3-13 PM | 5 |
| final_no_hyperlinks_2_22_19_cybercrime_consolidated_i | ssue, POF | 2.46 MB | 6/13/23, 5:19 PM | : |
| elder_justice_consolidated_journal_12_18_18_without_hy | perlir Pop | 2.31 MB | 6/13/23, 5:19 PM | 5 |
| asset_forefeiture_and_money_laundering_0.pdf | PDF | 1.98 MB | 6/13/23, 5:19 PM | 5 |
| 20.11.28508_compliant_gangs_with_mastheadfina | l_edit Por | 1.67 MB | 6/13/23, 5:19 PM | : |
| 20.06.01elitigation_without_hyperlinks.pdf | POF | 1.03 MB | 6/13/23, 5:19 PM | 5 |
| 04232019-appeals-issue.pdf | PDF | 1.48 MB | 6/13/23, 5:19 PM | 5 |
| | | | 1-8 (| of 8 < > |

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 <u>5/10 Product Update</u>, 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:

| ۲ | | >> = Summar | ize | |
|----------|--------------------------------------------------------|----------------------|----------------------------------|-----------------------------------------------------------------------------------|
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| Q, | | REGUEST | Show Files Y | Follow-in Skill a |
| R. | | The sport of t | | Basian Decurrents |
| Ð | Simplifying 3 fil | RESPONSE | FileName.pdf | An experience of the sector about any of the documents uploaded here. |
| | - A woman chal - A doctor and a - The court side | | ✓ FileName2.pdf | Load a Brief Summary 1-3 paragraphs summarizing each document |
| là, | - The court four - However, the c | | ✓ FileName3.pdf | Load a Comprehensive Summary A paragraph summary will be given for each A |
| Ŗ, | fetus, which be - A woman chal | | ✓ FileName4.pdf | page in the spraked cocurrence |
| С | - A doctor and a - The court rule | | ✓ FileName5.pdf | ~ |
| | - The court four - However, the c | | | |
| | fetus, which be | | | |
| | | | | |
| | Ask Co-Co a gu | | | |
| | Nor of State | | | |
| ~ | - Summar | | | |
| ۶ | | Is this helpful? 🖒 (| Γ | 🕢 Refine Response 👲 Download 🔲 |

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

| ٠ | >> = Summarize | | | | |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------|------------------|------|
| 8 | REQUEST Show Files ~ | | Cancel | view Documents 🔸 | |
| Q | Review Documents | × | | | |
| | Questions to answer from text | | | - - | |
| B. | Who were the parties in the document? | σ | | ¥ | |
| Pa | 1003 characters remaining Ask a question | 0 | | 4 | |
| с | 1000 charactere remaining Aske a question | | | | |
| | Proc. to specialize and the second se | 0 | | | |
| | ← Back Det your ann | amers | | | |
| | Ásk Co-Co e qu | | | | |
| Θ | - Summer | | | | |
| • | intractional in the Second State | | 🔆 Refine Response | ⊉ Download I | Сору |

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:

| 🔇 Search a Database | | | | × |
|---------------------|--------------|-------|--------------|---|
| Select a database | | | New database | |
| Database name | Organization | Files | Date Added | |

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:

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|--------|
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| |
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| Change |
| |
| Change |
| tabase |
| |

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:

| 🇞 Search a Database // New Database | | |
|-------------------------------------|------|--|
| Only I All members of Casetext | | |
| Only I A can view and upload | | |
| ← Back | Save | |

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:

| iz | 🔞 Search a Database // New Database | × |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| | Upload document(s) to DOJ Test 2 | |
| - iui a1 | O0statrpt.pdf O1statrpt.pdf O1statrpt.pdf O2_stat_book.pdf O3_STAT_Report.pdf .doc, .do O5statrpt.pdf .txt, .wpd are supported O6statrpt.pdf O7statrpt.pdf O8statrpt.pdf | |
| blic | ← Back | Done |

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):

| ۲ | Admin Dashboard | | Member Permissions | | | | | |
|----|--------------------|--|--------------------|-------|-----------|-----------|------------------------------|-----|
| | CoCounsel usage | | | | | | | |
| 2 | AllSearch usage | | Name | Admin | AllSearch | CoCounsel | CoCounsel skills (7) | _ |
| ď | Member Permissions | | John Wick | ~ | ~ | ~ | ~ | 1 |
| | | | | | | | Rows per page: 20 👻 1-1 of 1 | < > |
| 49 | | | | | | | | |

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:

CoCounsel skills (7)



Enabling access for controlling Member Permissions:

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