CoCounsel Release Notes: 7/12/23

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>.

Resources

We are working on a series of educational resources that address how attorneys can comply with their ethical obligations when using generative AI. As a starting point, the article available <u>here</u> explains how attorneys can comply with their ethical duties of confidentiality while using CoCounsel. The article available <u>here</u> tracks the different courts that require the disclosure of AI and explains how CoCounsel users can comply with those orders. Additional resources, including a CLE webinar that addresses the ethical implications of using AI, are coming soon.

Recent Improvements:

Manage databases

You can now manage your database(s) 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").

Step 1: View database(s) in a CoCounsel skill

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				
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

Step 2: Manage access, rename, or upload files to your database

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

Home / My AllSearch Databases / DOJ Test / Files

DOJ Test Files	🚢 Manage ac	Amage access (Only me) > More Ac		1 Upload I	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	F PDF	םואו ש.ו	0/13/23, 3-19 PM		5
final_no_hyperlinks_2_22_19_cybercrime_consolidated_i	issue, PDF	2.46 MB	6/13/23, 5:19 PM		:
elder_justice_consolidated_journal_12_18_18_without_hy	perlir PDF	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	I_edit	1.67 MB	6/13/23, 5:19 PM		:
20.06.01elitigation_without_hyperlinks.pdf	PDF	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	of8 <	>

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.

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.

Linked skills from "Summarize" - "Review Documents"

You will soon be able to run other relevant skills such as "Review Documents" from the "Summarize" skill response. As featured in the 5/10 Product Update, you can currently run "Summarize" from "Review Documents."

Step 1: Select "Follow-up Skill" in the dropdown

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 "Review documents" on your "Summarize" results:

>>	= Summarize				
	Summarize complete	ed.			
	REQUEST	Hide files A Fields v. Twitter, Inc.pdf For privatejetservicesgroupvtwitter.pdf			
	RESPONSE	Detailed Summary:	F	Follow-up Skill Review Documents Ask specific questions about any of the documents updaded here	>
		Pages 1-3 > - Plaintiffs-Appellants Tamara Fields and Heather Creach are suing Twitter on behalf of the estates of their husbands, Lloyd "Carl" Fields, Jr. and James Damon Creach, respec - Fields and Creach were killed in an attack in Jordan on November 9, 2015, for which If - Plaintiffs-Appellants allege that Twitter knowingly provided material support to ISIS in messaging services, which proximately caused their injuries Twitter moved to dismiss the case, and the district court granted the motion, ruling th that they were injured "by reason of" Twitter's conduct and that Twitter's liability was op	the form at Plaint recluded	Load a Brief Summary 1-3 paragraphs summarizing each document Load a Comprehensive Summary A paragraph summary will be given for each page in the uploaded document in of Twitter accounts and direct- tiffs-Appellants failed to plead b v \$ 230 of the Communications	>

You can also choose to produce different Summary lengths on the same document(s) in the "Follow-up skill" dropdown option.

Step 2: Select document(s)

For "Summarize" runs with multiple documents, you can select specific or all documents to run in "Review Documents," and click the "Review Documents" blue button (shown in the red boxes in the screenshot below):

= Summarize				
REQUEST	REQUEST Hide files A Fields v. Twitter, Inc.pdf for privatejetservicesgroupvtwitter.pdf			
RESPONSE	Detailed Summary: Select the documents you wish to submit. Select all documents	Cance Review Documents >		
	Fields v. Twitter, Inc.pdf	\checkmark		
	privatejetservicesgroupvtwitter.pdf	\checkmark		

Step 3: Enter questions and run "Review Documents"

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

٠	>> == Summarize		
2	REQUEST Show Hes ~		Careal Review Documents
а, —	Review Documents	×	
	Questions to answer from text		
•	Questions to answer from text		
B,	Who were the parties in the document? 1003 characters remaining		~
R	Ask a question	0	~
C	Ask a question		
	1002 characters remaining Add another question		
	← Back Det yo	ur answers	
	Ask Co-Co a gu		
Θ	- Summer		
	is this begins of P	0	Refine Response 👲 Download 👘 Copy

Step 4: View followup skill requests

Followup skill requests will appear at the top of the results page

>>	- Summarize	
	O Reviewing 2 documents	View 1%
	REQUEST Show files V	

Step 5: Expand results for followup skill You can click on "View" to navigate to the results page for the followup skill request

The table below shows shortened versions of the answers to your questions. Click the row to see more details.			
Documents	Parties involved	Rulings	
For Fields v. Twitter, Inc.pdf	Plaintiffs, Twitter, amici	Multiple rulings	
PDF privatejetservicesgroupvtwitter.pdf	PJS, Twitter	-	
		Rows per page: 20 \star 1–2 of 2 $\langle \rangle$	

Upon clicking on any of the cells in the "Review documents" table, you can also view the detailed output of the results:

