CoCounsel Release Notes: 1/18/24

Resources:

Our Help Articles provide robust resources on how to optimize CoCounsel. We strongly encourage users to read these articles, as they provide detailed information with video walkthroughs and more step-by-step guidance. **You can access Help Articles here. You can also access video tutorials here.**

Released:

Enhancement - Database management

Databases are now easier to find and manage in CoCounsel by selecting "Database management" in the lower left-hand side panel:

Consolidated Database Management Access

Upon clicking "Database management," you are able to view all databases you have created or have been shared with you in a consolidated view:

Clicking on a database under the column "Database name" will direct you to view all the files in your database. On the database page, you can view each file, Manage access permissions and invite other viewers in your organization, rename or delete the database, and upload more files.
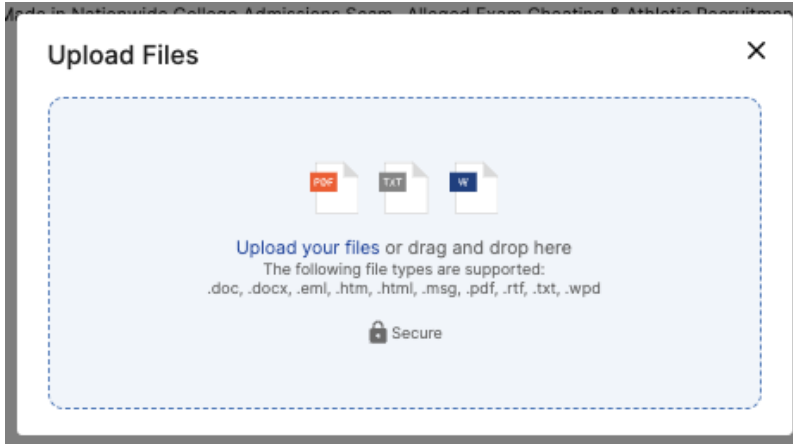

2

Uploading Files

By selecting the "Upload Files" option, you can add files to your database:

You will know your files are uploaded when the green banner appears confirming your files have finished processing:

Once the green banner notification appears, you must refresh your browser to confirm that you have acknowledged the notification and to view the additional file(s),

Create, Edit & Filter Databases

Create:

To create a database, select the blue "Create a new database" button on the upper right corner of the "Database Management" screen:
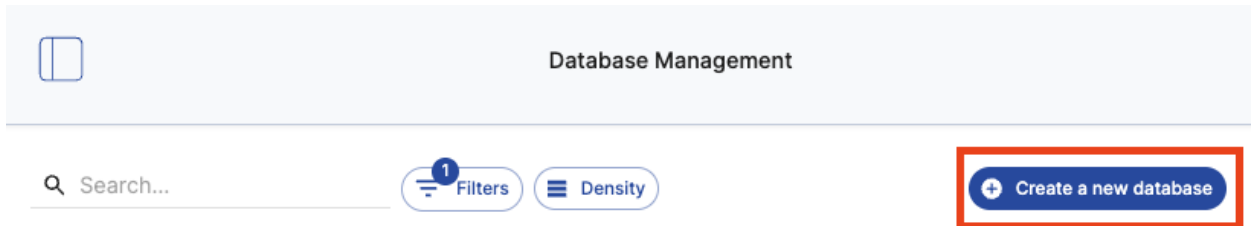
After selecting "Create a new database," a pop-up will appear to select the use case of your database.

Once you select your database use case, you can proceed to name and upload your files.

Edit

For databases you have created and own, you can select the 3-dot icon to rename or delete the database:

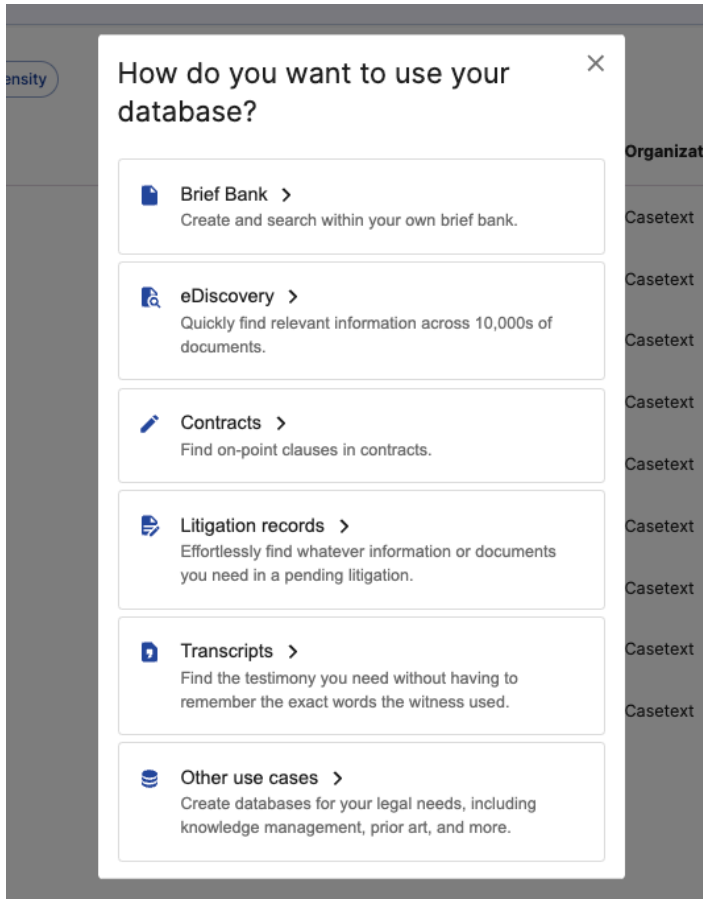| Database name	Organization	# of files	Date added	
tour de france usps	Casetext	19	12/15/23, 6:14 PM	⋮
				✏️ Rename
varsity blues	Casetext	3	12/1!	🗑️ Delete
rfp	Casetext	16	12/15/23, 6:16 PM	⋮

Filter

To find a specific database, you can select the filtering capability:

Q Search...		⚊ 1 Filters	☰ Density		⊕ Create a new database

Database name ▼	Organization ↓	# of files	Date added	

Columns	Operator	Value		
Database name ▼	contains ▼	contracts	✕	
+ Add filter			🗑️ Remove all	

| Agreements & Contracts | Casetext | 6 | 12/15/23, 6:16 PM | ⋮ |

(visible in the filtered list: 5 — 4/18/23, 10:07 AM; 4 — 11/29/22, 5:32 PM; 3 — 10/11/23, 4:05 PM)

You can filter and find your databases by:

- Name of Database
- Date the Database was added
- # of files