

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:

The screenshot displays the CoCounsel user interface. At the top left, there is a header for 'Database management' with a database icon. Below this, a vertical sidebar contains various navigation options. The 'Database management' option is highlighted with a red rectangular box. The main content area shows a chat interface with a 'NEW CHAT' button and a greeting 'Hi Christine!'. Below the greeting, there are four action buttons: 'Research' (Get answers about laws, cases, regulations, etc., or your own databases.), 'Review' (Pinpoint key information in documents, contracts, or databases.), 'Draft' (Write questions, contract outlines, or correspondence.), and 'Summarize' (Condense critical information in any kind of document.). At the bottom of the chat area, there is a 'Give me examples' button and a text input field with a 'What would you like to do today?' placeholder and a send button. An 'Upload' button is also visible at the bottom of the chat area. A footer note states 'Your data is private and secure. Learn More >'.

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:

The screenshot shows the 'Database Management' interface. At the top, there is a 'New chat' button and a 'Database Management' header. Below the header, there is a search bar, 'Filters' and 'Density' buttons, and a 'Create a new database' button. A table lists several databases with columns for 'Database name', 'Organization', '# of files', and 'Date added'. The table is highlighted with a red border. Below the table, it says 'Total Rows: 9 of 32'. On the left side, there is a sidebar with navigation options like 'File management', 'Database management', and 'What's new in CoCounsel'.

Database name	Organization	# of files	Date added
tour de france usps	Casetext	19	12/15/23, 6:14 PM
varsity blues	Casetext	3	12/15/23, 6:15 PM
rfp	Casetext	16	12/15/23, 6:16 PM
Agreements & Contracts	Casetext	6	12/15/23, 6:16 PM
caselaw	Casetext	5	12/15/23, 6:19 PM
20c	Casetext	4	10/9/23, 1:57 PM

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.

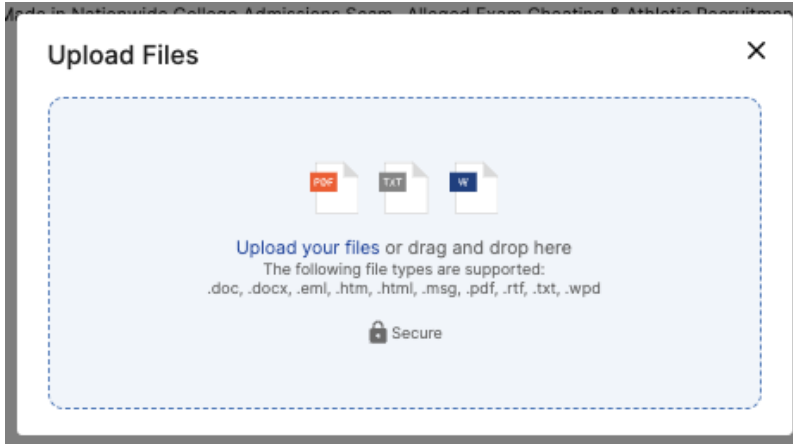
The screenshot shows the 'Database Management' interface for a specific database. At the top, there is a 'Database Management' header. Below the header, there is a breadcrumb trail 'Databases / tour de france usps (Casetext)'. The main heading is 'tour de france usps Files'. There are buttons for 'Manage access (Only me)', 'More Actions', and 'Upload Files'. Below the heading, there is a search bar, 'Filters', 'Columns', and 'Density' buttons. A table lists files with columns for 'File name', 'Size', and 'Date added'. A dropdown menu is open over the table, showing options: 'Download all files (19)', 'Rename database', and 'Delete database'. The table is highlighted with a red border.

File name	Size	Date added
Verdy-Jean-Pierra-Decalaration.pdf	36.62 KB	12/15/23, 6:15 PM
Testasecca-Lory.pdf	531.84 KB	12/15/23, 6:15 PM
SF-Simeoni-Filippo-Affidavit.pdf	1.36 MB	12/15/23, 6:15 PM
Scott-Paul-Affidavit.pdf	1.26 MB	12/15/23, 6:15 PM
Robertson-Jack-Affidavit.pdf	597.33 KB	12/15/23, 6:15 PM
Polay-Dawn.pdf	256.55 KB	12/15/23, 6:15 PM
Leipheimer-Levi-Affidavit.pdf	6.15 MB	12/15/23, 6:15 PM
Landis-Floyd-Affidavit.pdf	3.35 MB	12/15/23, 6:15 PM
Jaksche-Jorg-Affidavit.pdf	3.11 MB	12/15/23, 6:15 PM

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:

Databases / varsity blues (Casetext)

varsity blues Files

[Manage access \(Only me\) >](#)

[More Actions](#) ▾

[Upload Files](#)

✓ Your files have been uploaded and processed. ✕

🔍 Search...

[Filters](#)

[Columns](#)

[Density](#)

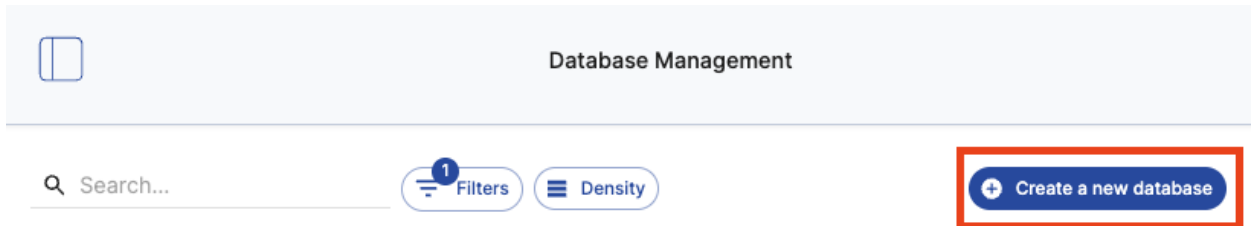
File name	Size	Date added	
Varsity Blues Affidavit.pdf	1.75 MB	12/15/23, 6:15 PM	⋮
District of Massachusetts _ Investigati...	488.76 KB	12/15/23, 6:15 PM	⋮
District of Massachusetts _ Arrests Ma...	162.39 KB	12/15/23, 6:15 PM	⋮

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),

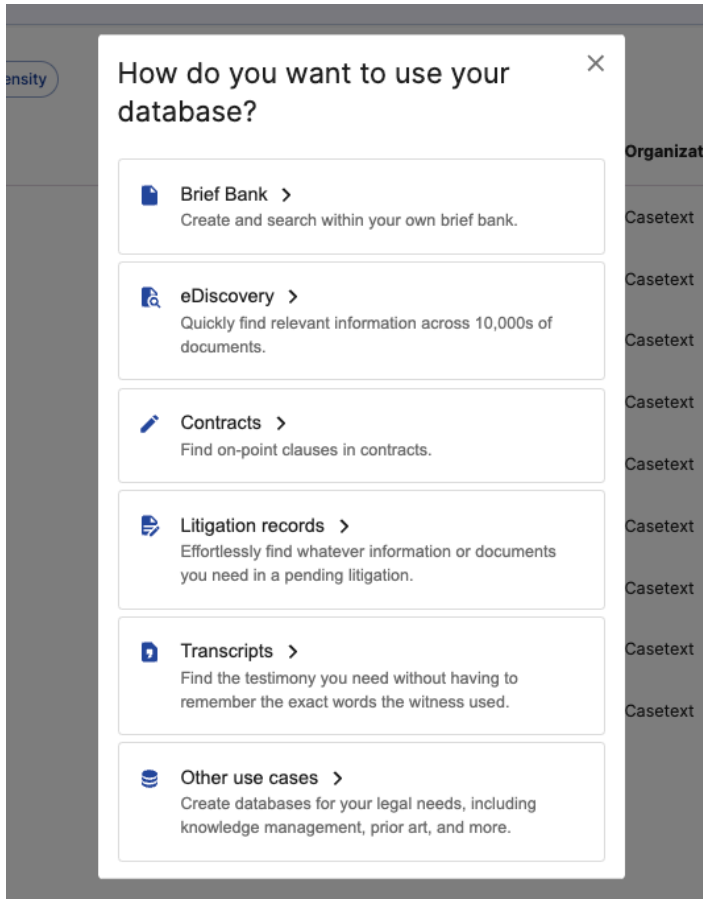
Create, Edit & Filter Databases

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
varsity blues	Casetext	3	12/15/23, 6:16 PM
rfp	Casetext	16	12/15/23, 6:16 PM

Filter

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

Q Search... Filters Density + Create a new database

Database name	Organization	# of files	Date added						
<div style="border: 1px solid red; padding: 5px;"> <table border="1"> <thead> <tr> <th>Columns</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Database name</td> <td>contains</td> <td>contracts</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> + Add filter Remove all </div> </div>				Columns	Operator	Value	Database name	contains	contracts
Columns	Operator	Value							
Database name	contains	contracts							
Agreements & Contracts	Casetext	6	12/15/23, 6:16 PM						

You can filter and find your databases by:

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