

CoCounsel Release Notes: 2/22/24

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: Matters

“Matters” is a new feature that allows you to compile chats in folders. You can now consolidate skill runs and chats to relevant projects and cases.

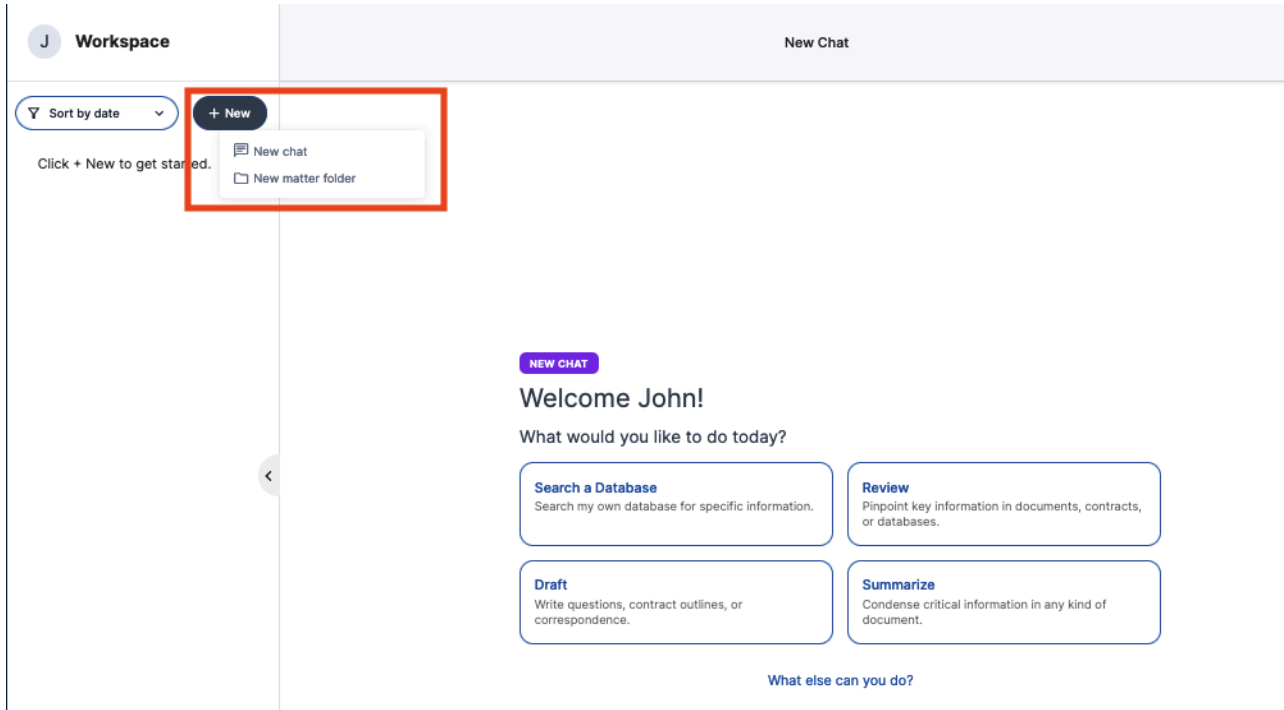
This feature is ideal for complex and large cases that require efficient information retrieval and assessing the level of work done for billing information purposes. Step-by-step instructions on how to use this feature are included below, with colored boxes surrounding buttons for you to take action on.

Section 1: Create a Matter folder

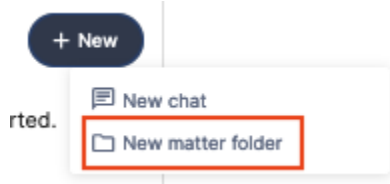
In CoCounsel, “Matters” are defined as folders where multiple chats can be hosted. Your “Workspace,” is defined as the left hand side panel that lists all of your matter folders and chats in a consolidated location.

Step 1: Go to your “Workspace,” select “New matter folder”

On the left-hand side panel, now also known as your “Workspace,” click on the navy “+New” button and select “New matter folder.”



Here is a closer look at the “New matter folder” feature:



Step 2: Enter matter folder details

After Step 1, a pop-up form will appear for you to label and enter details for your matter folder.

New matter folder

Create a matter folder to help organize your chats.

Matter ID *

12345-12

Nickname (optional)

Tour de France Matter

Description (optional)

Matter folder to compile witness transcripts against Lance Armstrong in the USPS Doping scandal.

Create matter folder Cancel

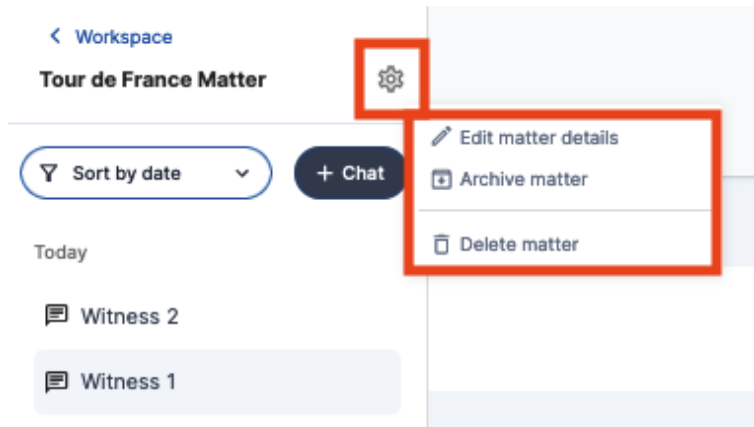
The fields include:

1. Matter ID: This is the only required field to enter and is an opportunity to label your matter folder with a unique identification number your firm has assigned to a specific case.
2. Nickname: An optional field to provide further identification, such as your client's name or a nickname your firm has assigned.
3. Description: Another optional field to show more details like a sentence description of your case.

After clicking "Create matter folder," you will see your matter folder in the left hand "Workspace" panel.

Section 2: Matter management - Edit, Archive, Delete

There are 3 ways to manage matter folders: Edit, Delete, Archive. These management tools can be accessed by clicking on the matter folder, and then selecting the gear icon:

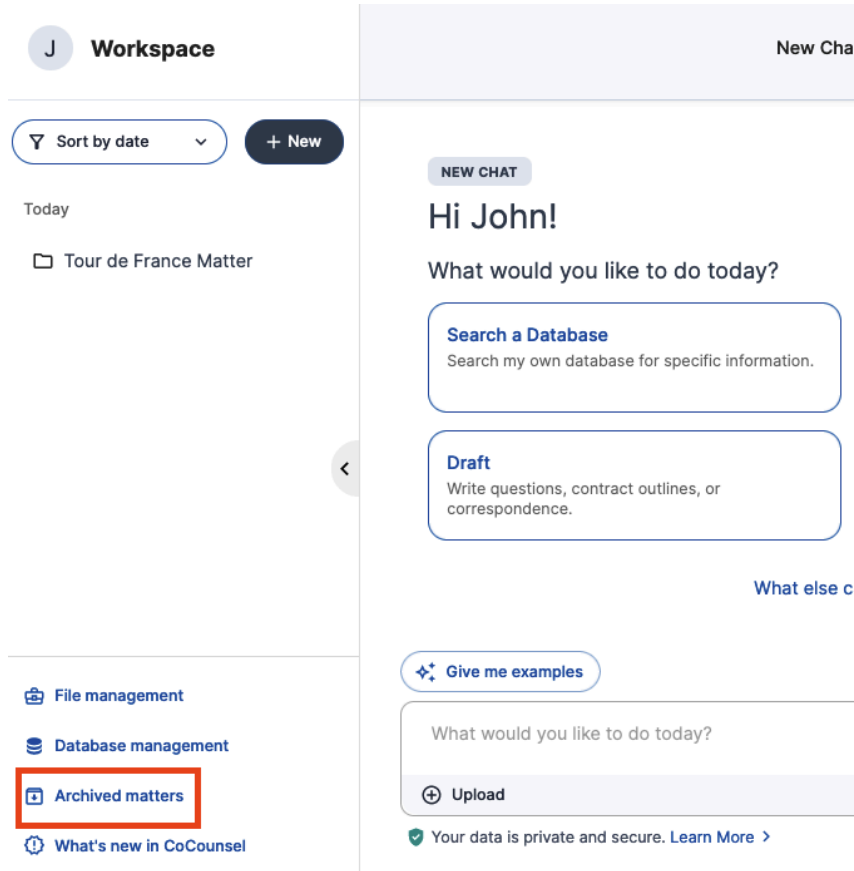


1-Edit matter folder

Editing your matter folder allows you to change the Matter ID, Nickname, and/or Description of your matter folder in the same pop-up form in Section 1: Create a Matter - Step 2.

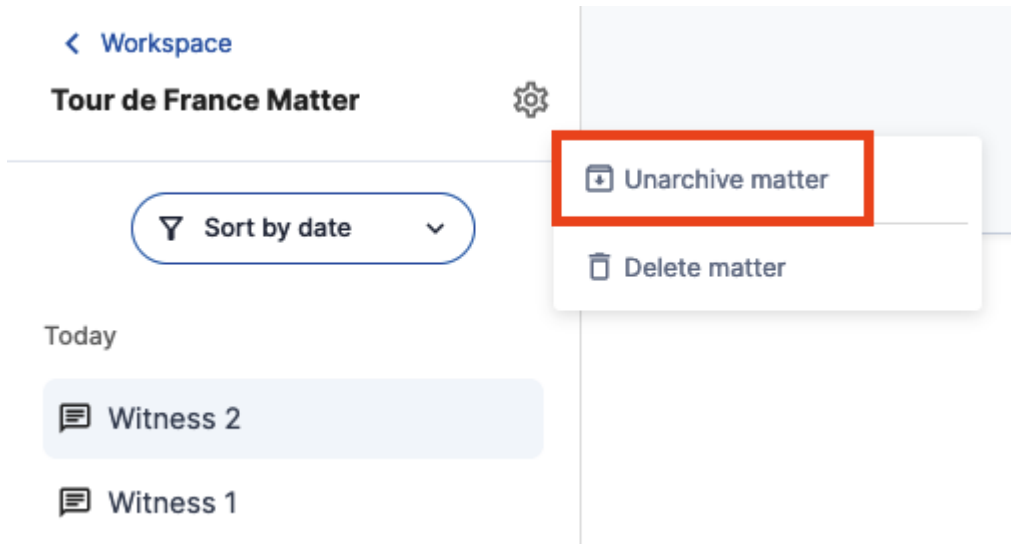
2-Archive Matters

Selecting "Archive Matter" will move the matter to the "Archived Matters" tab in the lower left hand core of the Workspace panel:



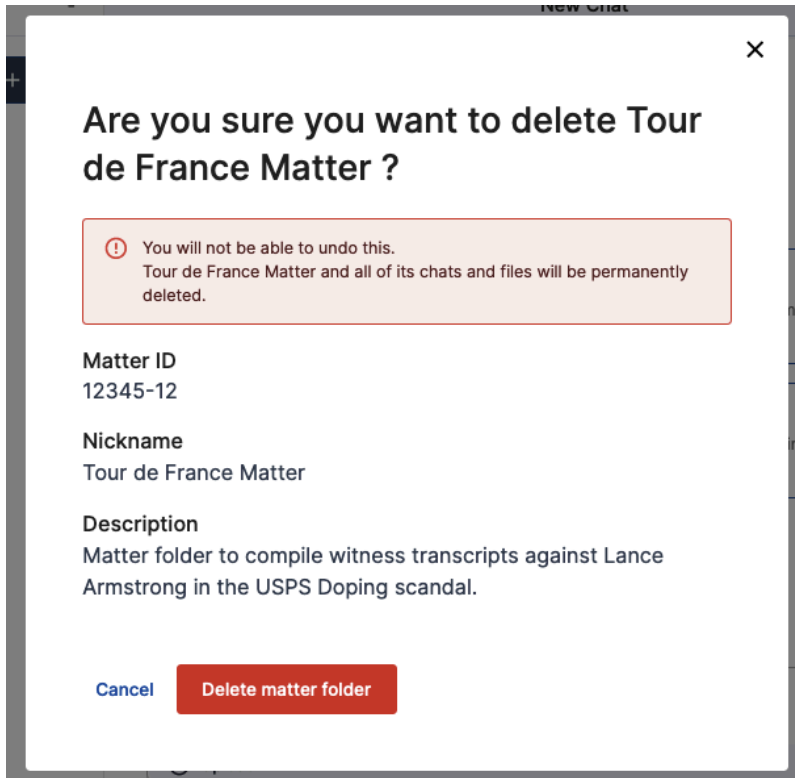
After archiving a matter folder, you can move it back to your Workspace by

1. going to “Archived matters,” then
2. selecting the matter folder you want revived in your Workspace, and
3. selecting the Gear icon and “Unarchive matter.”



3 - Delete matter folder

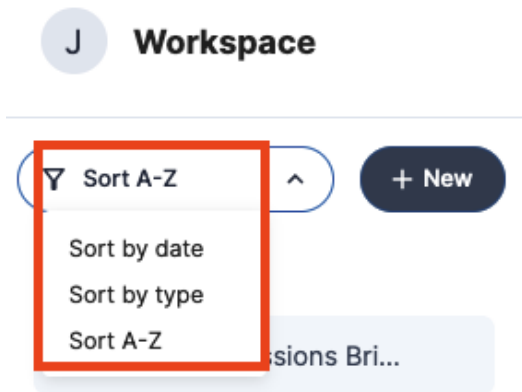
Deleting matter folders is irreversible. Once you decide to delete a matter folder, all chats, files, and skill runs in that matter folder will not be retrievable. This is shown when you select the delete option and a notification with a red warning banner will appear:



If you are unsure of whether you need to keep your matter folder, it is recommended to archive the matter folder instead.

Section 3: Filtering Matters

In your Workspace, you can filter through your matter folders and chats in 3 ways:

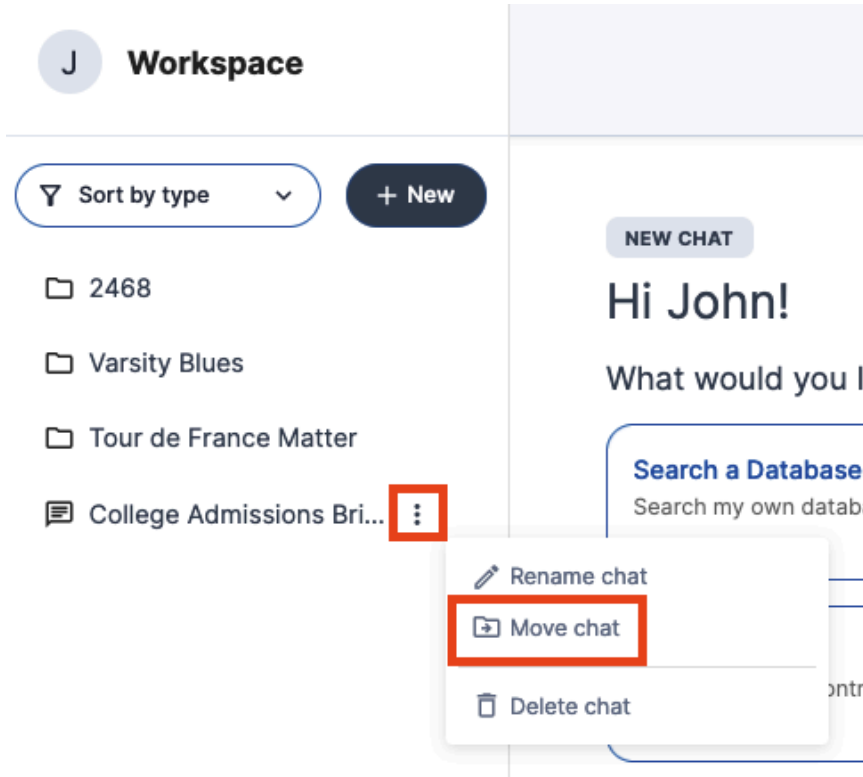


1. Sort by date - most recently created chats or matter folders will appear at the top of your Workspace list,
2. Sort by type - this filters matter folders vs chats. Matter folders will appear at the top of your Workspace list.
3. Sort A-Z - this will show an alphabetized list of your matters and chats in ascending order.

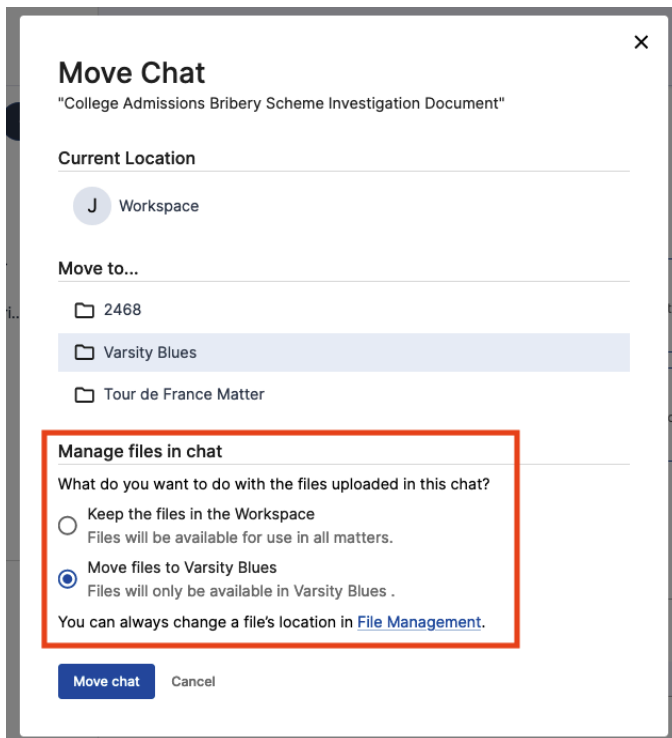
Section 4: Move existing chats to Matters

You can also move existing chats to matter folders, including chats created before this matter folder feature change.

If you go to your Workspace, you can hover over the chat, click on the 3-dot icon, and select "Move chat."



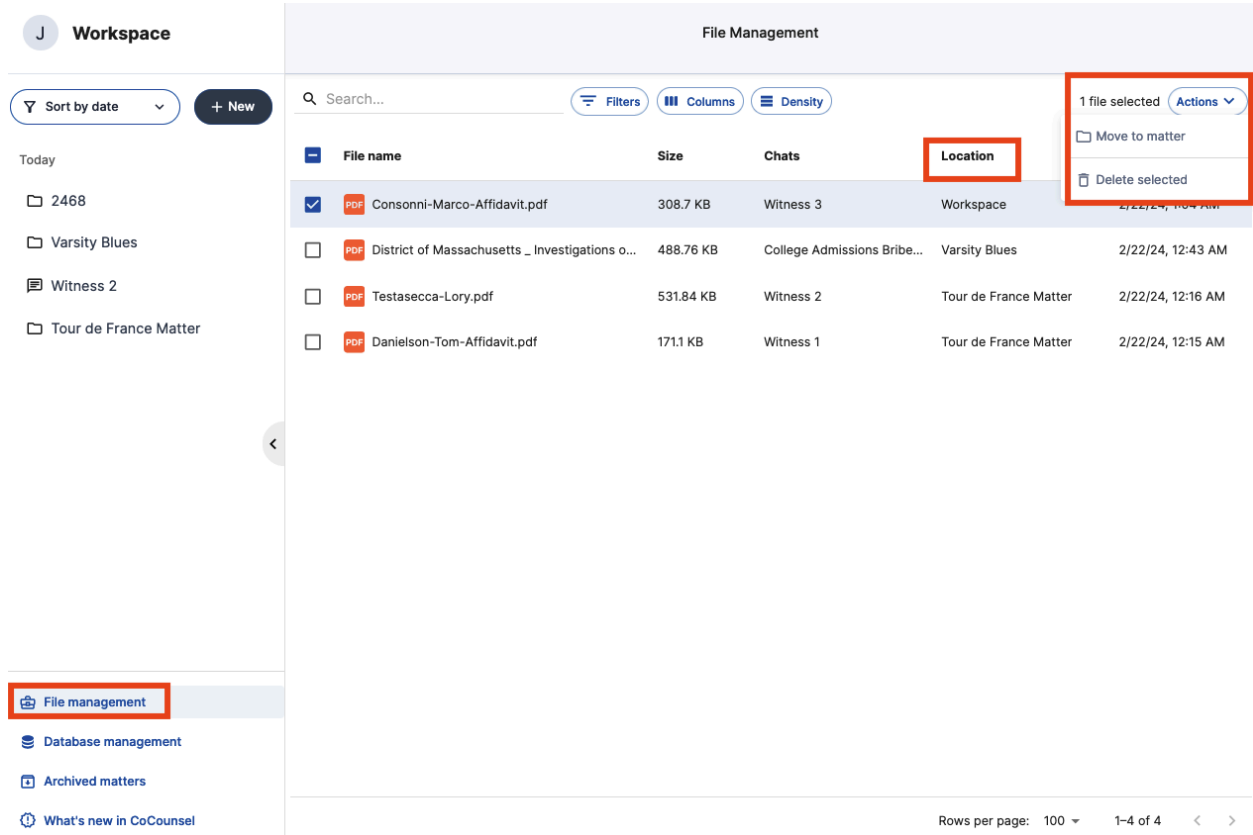
A pop-up will appear to allow you to select options to move your files in the matter folder or keep your files in their current location:



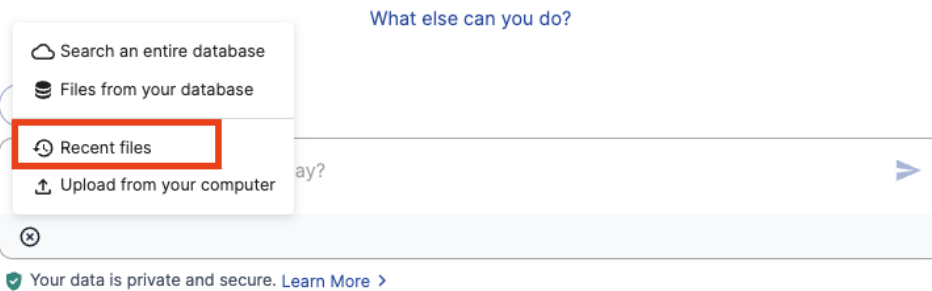
Section 5: File Management

File Management Tab

In the “File Management” tab of your Workspace, there is a new column that shows you if your files are located in a matter folder or in your Workspace. From here you can select file(s) that you want to move to a specific matter folder or delete.



Recently Uploaded Files



When uploading files previously used in CoCounsel, files only pertaining to the matter folder will appear in the “Upload recent files” list. This means that files used in other matter folders will not appear. You can select “Show Workspace Files” to view files from your Workspace here.

