

# CoCounsel Release Notes: 2/29/24

## 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: Find, Edit, Add, & Delete in new “Favorites” tab**  
**“Favorites” is a new tab that allows you to find, edit, add, and delete your saved prompts in CoCounsel.** Previously used prompts are easier to retrieve.

## Section 1: Find Favorites

In CoCounsel, “Favorites” are defined as prompts that you have added and saved.

Step 1: Go to your “Workspace,” select “Favorites” tab

On the lower left-hand side panel, also known as your “Workspace,” select the “Favorites” tab:

**C Workspace**

Sort by date ▼ + New

Today

- Nationwide College Ad...

Past 7 Days

- matter 2

Past 30 Days

- matter 1

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- File management
- Database management
- Favorites**
- Archived matters
- What's new in CoCounsel

### Step 2: Review your “Favorites”

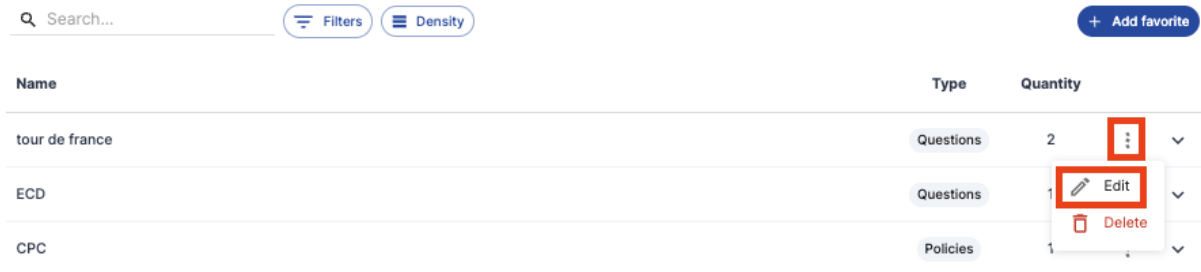
You can review your previously used and saved prompts on a consolidated list. Selecting the downward pointed arrow will reveal what your saved prompt was:

Search... Filters Density + Add favorite

Name	Type	Quantity	
tour de france	Questions	2	⋮ ^
<div style="border: 2px solid red; padding: 5px;"> <p>Your questions</p> <ol style="list-style-type: none"> <li>1. When did the witness compete in the Tour de France?</li> <li>2. How does the witness describe their relationship with Lance Armstrong?</li> </ol> </div>			
ECD	Questions	1	⋮ ▼
CPC	Policies	1	⋮ ▼

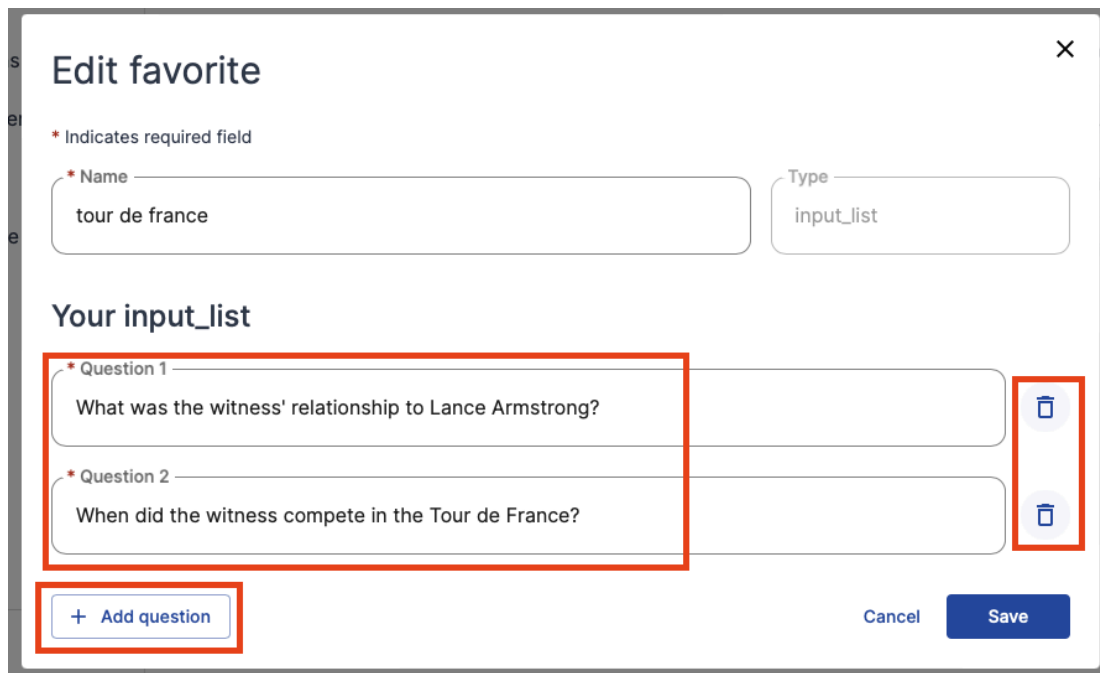
## Section 2: Edit Favorites

Editing your “Favorites” allows you to refine your prompts entered into CoCounsel. Go to the “Favorites” tab, select the 3-dot icon, and click “Edit”:



Name	Type	Quantity
tour de france	Questions	2
ECD	Questions	1
CPC	Policies	1

After clicking “Edit”, a pop-up will appear where you can edit existing prompts, add, or remove prompts to customize your favorite questions:



**Edit favorite** [X]

\* Indicates required field

\* Name:  Type:

**Your input\_list**

\* Question 1:  [trash icon]

\* Question 2:  [trash icon]

+ Add question [Cancel] [Save]

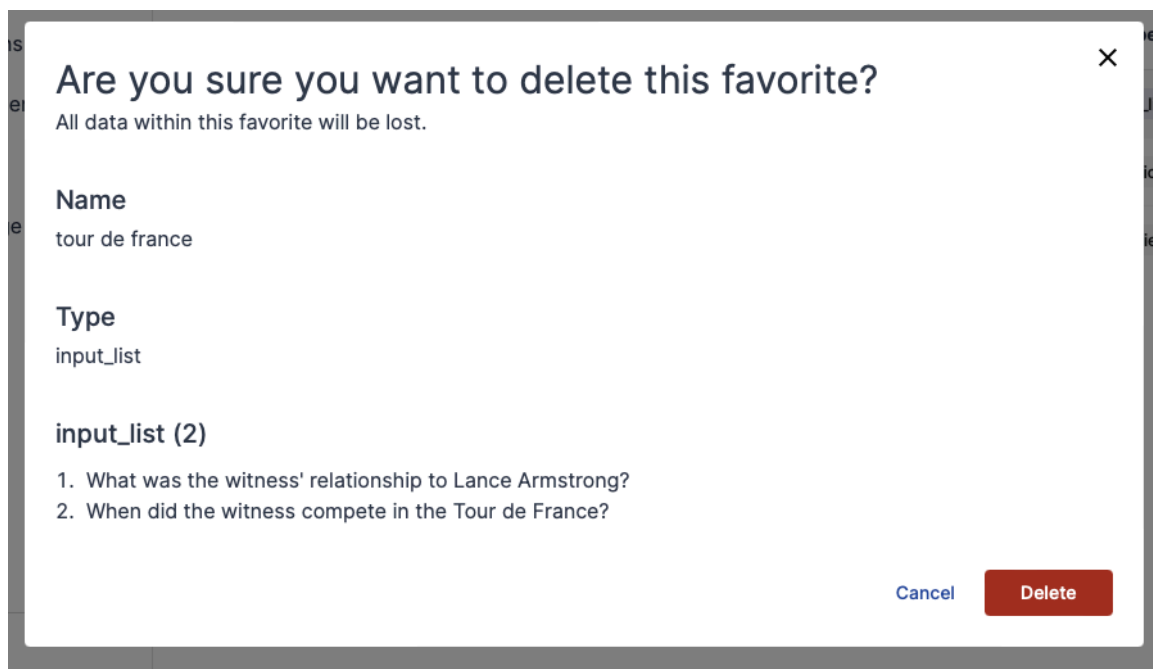
## Section 3: Delete Favorites

Deleting your “Favorites” allows you to delete your previously saved prompts. Go to the “Favorites” tab, select the 3-dot icon, and click “Delete”:

Q Search... Filters Density + Add favorite

Name	Type	Quantity	
tour de france	Questions	2	⋮
ECD	Questions	1	Edit
CPC	Policies	1	Delete

After clicking “Delete”, a pop-up will appear confirming you want to delete the saved prompt permanently:



## Section 4: Add Favorites

You can now add prompts to your “Favorites” without triggering a skill in chat in the “Favorites” tab.

On the upper right-hand corner in your “Favorites” tab, select the “+Add Favorite” button:

Name	Type	Quantity
tour de france	Questions	2
ECD	Questions	1
CPC	Policies	1

“Questions” can be run in “Review Documents,” and “Extract Contract Data” only, while “Policies” can be run in “Contract Policy Compliance.” Differentiating the type of favorite (“Questions”/“Policies”) can help you filter through multiple saved prompts in your “Favorites” tab:

Search... **Filters** Columns Density **+ Add favorite**

Name	Type	Quantity
	Policies	1

Columns Operator Value  
 Type contains policies

+ Add filter Remove all

### Section 5: Using “Favorites” in Chat

The saved prompts in your “Favorites” tab will now be reflected when you invoke a skill in chat.

“Questions” will appear when you are running “Review Documents” and “Extract Contract Data” after invoking these specific skills:

CoCounsel 9:27 PM  
 I understand you want to review the uploaded affidavit.

**Review Documents**

#### Your questions

\* Question 1  
 Type a question here

+ Add question **♥ Add from favorites** Cancel **Submit request**

♥ Add from favorites (3) ✕

<input type="checkbox"/> Name	Type	Quantity
<input type="checkbox"/> tour de france When did the witness compete in the Tour de France? How does the witness describe their relationship with Lance Armstrong?	Questions	2 ^
<input type="checkbox"/> ECD	Questions	1 v
<input type="checkbox"/> Varsity Blues	Questions	2 v

Total Rows: 3

[Cancel](#) [Add saved questions](#)

“Policies” will appear when you are running “Contract Policy Compliance” only:

CoCounsel 5:10 PM Contract Policy Compliance

I understand you want to check the compliance of a contract against certain policies.

### Your policies

\* Policy 1

[+ Add policy](#) [♥ Add from favorites](#) [Cancel](#) [Submit request](#)

♥ Add from favorites (1) ✕

<input type="checkbox"/> Name	Type	Quantity
<input type="checkbox"/> CPC	Policies	1 v

Total Rows: 1

[Cancel](#) [Add saved policies](#)