

# CoCounsel Release Notes: 4/4/24

## 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:

Mix & match database files + uploaded files in skill runs

**You can now search files from your database and upload files from your computer in one skill run.** Rather than the previous multi-step process of selecting files from your database, triggering a skill run, and then separately uploading files, CoCounsel now enables you to conduct comprehensive searches across all files simultaneously. This enhancement ensures skill outputs are based on relevant files, irrespective of their location, facilitating a more organized workflow.

Step 1: Select files from your database

In the bottom of the chat window, select “+ Upload” and click on “Files from your database”:

What would you like to do today?

**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.

**Summarize**

Condense critical information in any kind of document.

What else can you do?

- Search an entire database
- Files from your database**
- Recent files
- Upload from your computer

Your data is private and secure. [Learn More >](#)

Select the files you want to include in your skill run. *Note: this option is not available for an entire database.*

**Add files**

Search... Filters Density tour de france

File name	Size	Date added
<input checked="" type="checkbox"/> PDF Verdy-Jean-Pierra-Decalaration.pdf	36.62 KB	3/13/24, 7:59 PM
<input checked="" type="checkbox"/> PDF Testasecca-Lory.pdf	531.84 KB	3/13/24, 7:59 PM
<input checked="" type="checkbox"/> PDF SF-Simeoni-Filippo-Affidavit.pdf	1.36 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Scott-Paul-Affidavit.pdf	1.26 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Robertson-Jack-Affidavit.pdf	597.33 KB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Polay-Dawn.pdf	256.55 KB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Leipheimer-Levi-Affidavit.pdf	6.15 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Landis-Floyd-Affidavit.pdf	3.35 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Jaksche-Jorg-Affidavit.pdf	3.11 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Hincapie-George-Affidavit.pdf	4.38 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Hamilton-Tyler-Affidavit.pdf	2.22 MB	3/13/24, 7:59 PM
<input type="checkbox"/> PDF Ferrante-Renzo-Affidavit.pdf	819.99 KB	3/13/24, 7:59 PM

3 rows selected Rows per page: 100 1-19 of 19

Add files

Give me examples

Click on the blue “Add files” button, and your files will be recognized by CoCounsel chat:

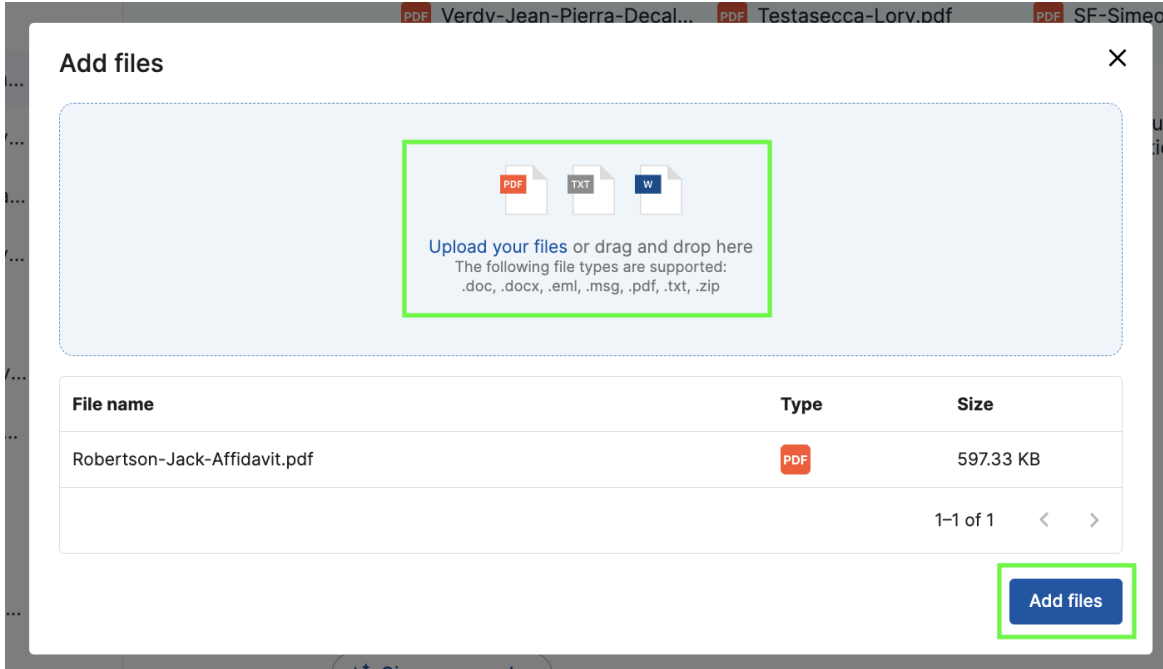
The screenshot shows a chat window titled "Tour de France Document Upload Identifiers". At the top, there are two tabs: "Chat" (selected) and "Results". A message from Christine Byon at 7:45 PM states "3 files added" and lists three PDF files: "Verdy-Jean-Pierra-Decal...", "Testasecca-Lory.pdf", and "SF-Simeoni-Filippo-Affid...". Below this, a message from CoCounsel at 7:45 PM asks, "Great, you've uploaded some files from an Allsearch Collection related to the Tour de France. How can I assist you with these documents? Would you like a summary, an identification of relevant information, or something else?"

## Step 2: Upload files from your computer

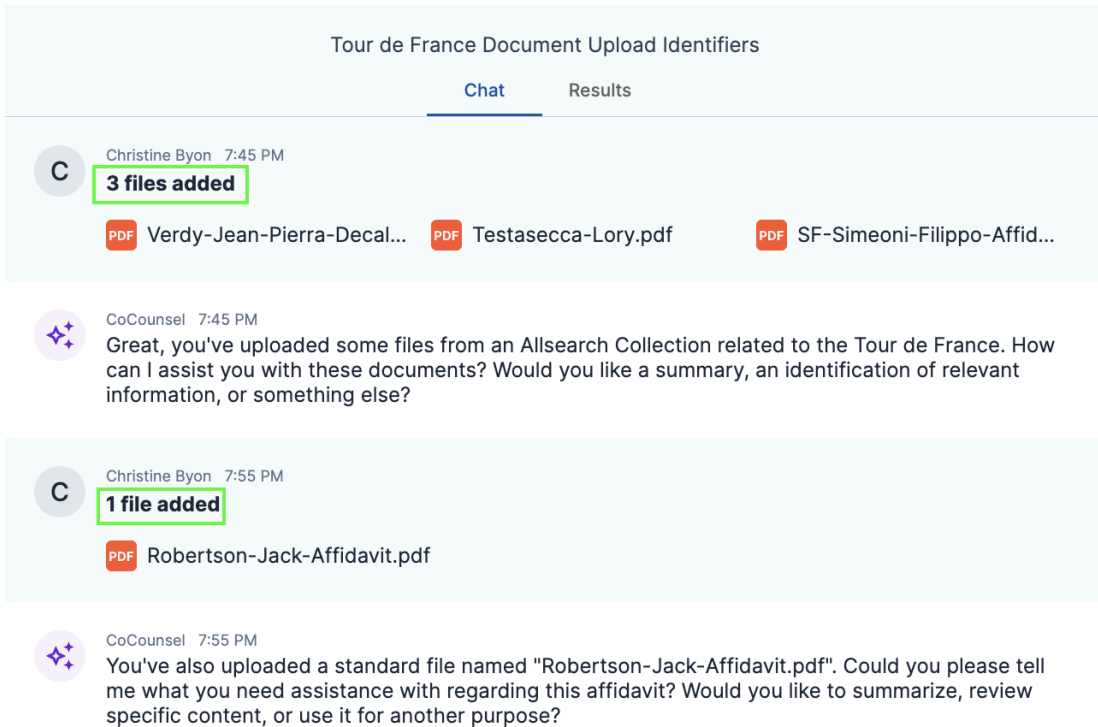
Before invoking a skill, upload more files from your computer by going to the bottom of the chat window. Select “+ Upload” and click on “Upload from your computer”:

The screenshot shows the bottom of the chat window. A dropdown menu is open, listing four options: "Search an entire database", "Files from your database", "Recent files", and "Upload from your computer". The "Upload from your computer" option is highlighted with a green box. Below the menu is a text input field with the placeholder "ask me a question" and a send button (arrow). At the bottom, there is a security notice: "Your data is private and secure. [Learn More >](#)"

Select files stored on your computer and click “Add files”:



These files should also be reflected in chat, in addition to files selected from your database in Step 1:



*Note: Step 1 & Step 2 are interchangeable. This order was used as a guide only. You can also use "Recent files" from your history.*

### Step 3: Trigger a skill

You can now invoke skills that support document uploads (“Review documents,” “Summarize,” “Extract contract data,” Timeline,” Contract policy compliance”). All files will be executed in the same skill run.

In this example, 3 files were selected from a database and 1 file was uploaded. Notice that all four files were used in this “Summarize” run after directing CoCounsel to summarize ALL files in the query:

The screenshot shows a chat interface with the following elements:

- Header:** "Tour de France Document Uploads" with tabs for "Chat" and "Results".
- Message 1:** From Christine Byon (8:06 PM), "3 files added". Below are three PDF icons with filenames: "Verdy-Jean-Pierra-Decal...", "Testasecca-Lory.pdf", and "SF-Simeoni-Filippo-Affid...".
- Message 2:** From CoCounsel (8:06 PM), "Thank you for uploading the files from the AllSearch collection related to the Tour de France. How may I assist you with these documents?".
- Message 3:** From Christine Byon (8:06 PM), "1 file added". Below is one PDF icon with filename: "BOWERS-Witness-Statement.pdf".
- Message 4:** From CoCounsel (8:06 PM), "You've now uploaded a standard file named 'BOWERS-Witness-Statement.pdf'. What would you like to do with this document?".
- Message 5:** From Christine Byon (8:07 PM), "Please provide a brief summary of all these files".
- Message 6:** From CoCounsel (8:07 PM), "Summarizing the files now...". A "Summarize" button is visible to the right.
- Summary Panel:** A box showing "46% Complete" with a progress bar. Below, "FILES (4)" lists the four PDF files. Under "SUMMARY TYPE", "Brief" is selected. At the bottom, there is a checkbox for "Email me when complete", a "Cancel" button, and a "View results >" button.
- Footer:** A button labeled "Give me examples".

Here is an example using “Review documents”:

C

Christine Byon 8:14 PM

**1 file added**

Landis-Floyd-Affidavit.pdf

✦✦✦

CoCounsel 8:14 PM

Another file named "Landis-Floyd-Affidavit.pdf" has been uploaded. Please let me know how you would like to proceed with this document. If you need it to be summarized or require another service, just give me the instructions.

C

Christine Byon 8:14 PM

review all of these uploaded documents

✦✦✦

CoCounsel 8:14 PM

Reviewing these files now...

Review Documents

**5% Complete**

**FILES (8)**

PDF

STATISTICAL\_REPORT\_...

PDF

STATISTICAL\_REPORT\_...

PDF

STATISTICAL\_REPORT\_...

[Show 5 more](#)

**QUESTIONS (2)** [Save to favorites](#)

1. When did the witness compete in the Tour de France?
2. How does the witness describe their relationship with Lance Armstrong?

Email me when complete

Cancel

View results
>

✦✦✦

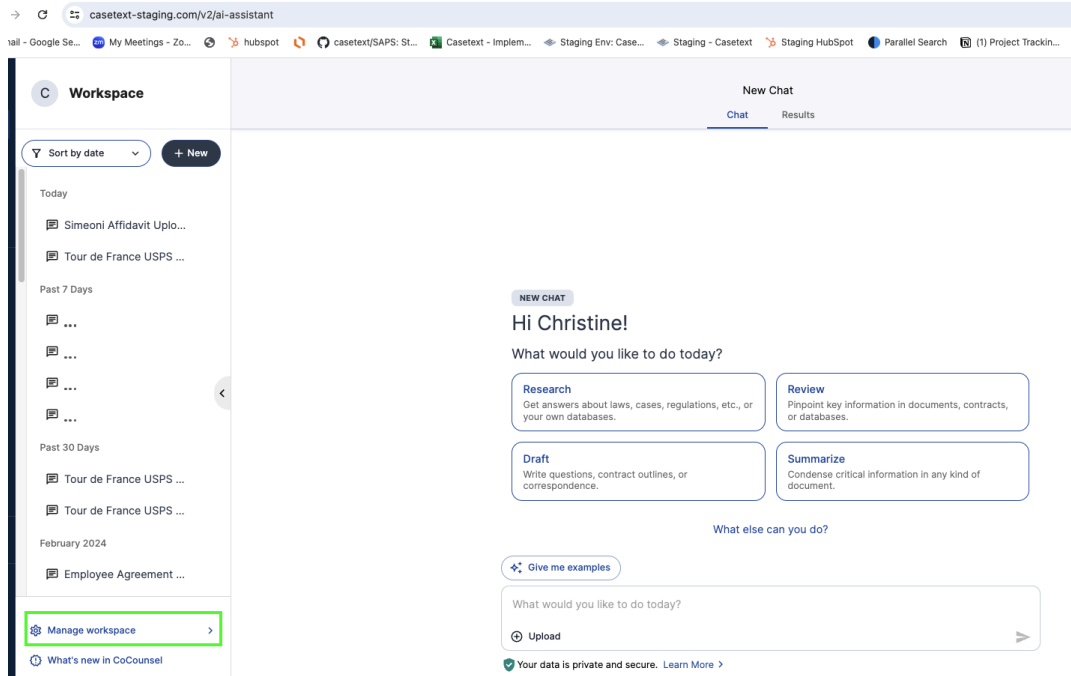
Give me examples

## Manage workspace Tab

“Manage workspace” is a new tab that enables you to access all non-skill CoCounsel features in a more user-friendly and organized view.

Step 1: Click on “Manage workspace” Tab

The “Manage workspace” tab can be found on the lower left-hand corner of the “Workspace” sidebar:

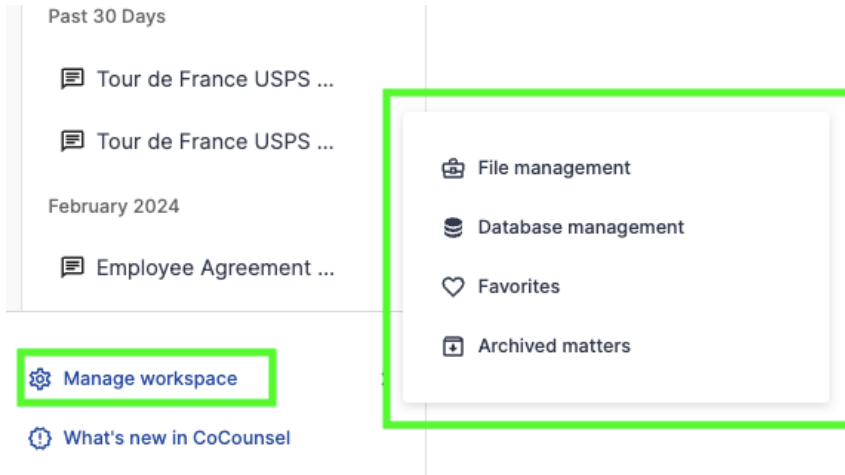


Here is a closer look at this new tab:

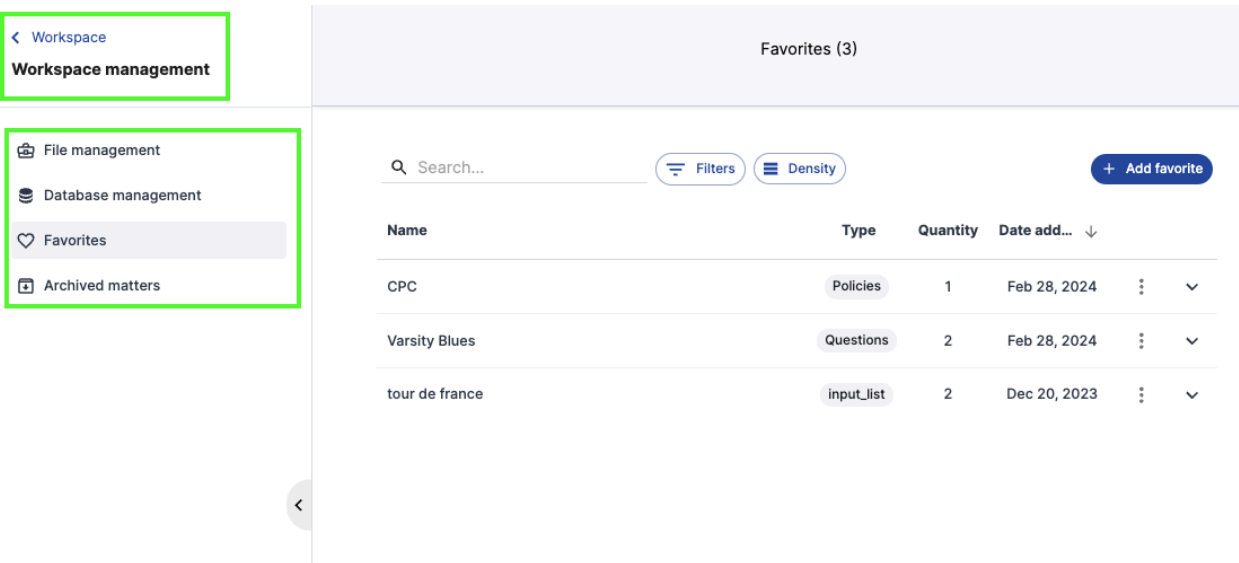


Step 2: Select a Workspace feature

After clicking on “Manage workspace,” a pop-up will appear showing Workspace features (File Management, Database Management, Favorites, and Archived Matters). Select one of these Workspace features:



Selecting a Workspace feature will direct you to that feature, with all the Workspace features persisting in the left-hand sidebar:



You can either choose a different Workspace feature, or go back to your Workspace.

## Market check - EDGAR M&A Database updated until 3/31/24

An option in “Market check” is to use publicly available mergers and acquisition agreements filed with the SEC. Once you log into CoCounsel and launch the “Market check” skill, you can select the EDGAR Database. The EDGAR database will be pre-populated in this skill.



When “Market check” first launched on 5/1/23, the EDGAR Merger Agreements Database had merger agreements from 2021-2023. **Now this database includes merger agreements from 1/1/2009-3/31/2024.**

When you launch the “Market check” skill in CoCounsel, you can select the “Market Check Merger Agreements” database from the “Database management” tab in your Workspace:

The screenshot shows the 'Database Management' interface. At the top, there are tabs for 'Chat' and 'Results'. Below the tabs is a search bar containing the text 'market check merger' with a clear button (X). To the right of the search bar are buttons for 'Filters' and 'Density'. Further right is a button labeled '+ Create a new database'. Below these elements is a table with the following data:

Database name	Organization	# of files	Date added
Market Check Merger Agreements 2009-2024	CoCounsel	18,528	4/28/23, 8:28 AM