

# CoCounsel Release Notes: 5/22/24

## 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](#).**

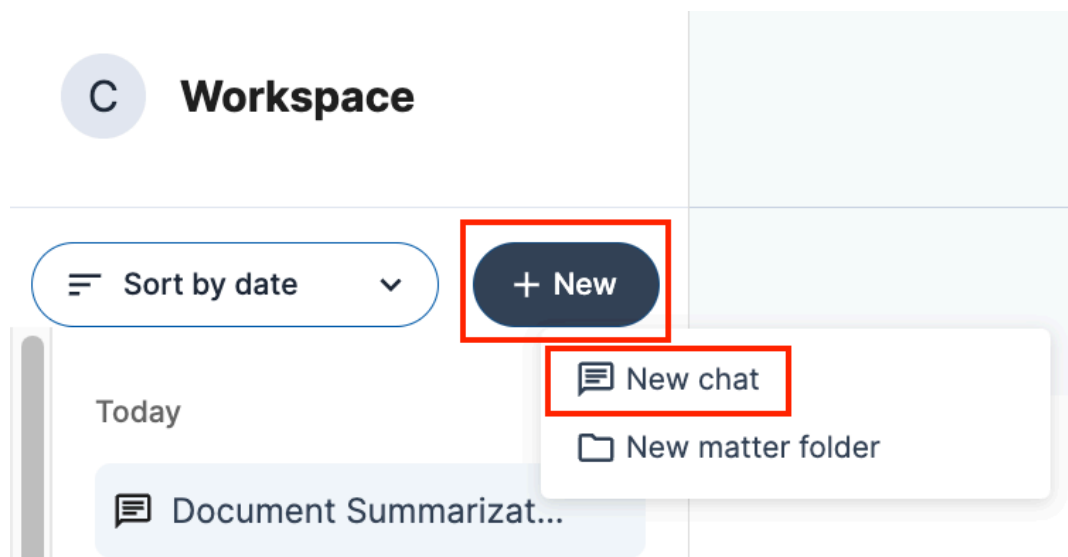
## Released: Enhancement - Discover & trigger skills faster

[Skills](#) are now easier to find with guided buttons in skill category tiles through chat and the right-hand sidebar. You can now find and launch skill runs through clicking buttons based on your use case, rather than just using specific-worded prompts.

### Option 1: Discover skills through Chat

#### Step 1: Open a “New chat”

In your Workspace on the left-hand sidebar, open a new chat by selecting “+New” and clicking on “New chat”:



#### Step 2: Select a chat tile

Select one of the chat skill category tiles that pertain to your use case:

NEW CHAT

Hi Christine!

## ✦ CoCounsel skills

Select a category that best describes what you want to do or describe it in the chat.

<p><b>Research</b></p> <p>Get answers about legal authorities or the content of your own databases.</p>	<p><b>Review</b></p> <p>Pinpoint key information in documents and contracts.</p>
<p><b>Draft</b></p> <p>Write letters, emails, memos, questions for investigative projects, and more.</p>	<p><b>Summarize</b></p> <p>Condense critical information in any kind of document.</p>

[Show all skills](#)

## ✦ CoCounsel skills

What are you working on today?

⊕ Upload

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

Here are the skills that will be shown depending on the skill category tile you chose:

- “Research” skills - based on your CoCounsel plan
  - “AI-Assisted Legal Research” for CoCounsel Core + Westlaw Precision users
  - “Legal Research Memo” for CoCounsel All-Access users
  - “Search a Database” for any CoCounsel user
- “Review” - accessible to any CoCounsel user
  - “Extract Contract Data”
  - “Contract Policy Compliance”
  - “Review Documents”
- “Draft” - accessible to any CoCounsel user
  - “Draft Correspondence” :
  - “Prepare for a Deposition”
- “Summarize” - accessible to any CoCounsel user
  - “Summarize”
  - “Timeline”


For more information on each skill, please refer to [this article](#).

### Step 3: Choose a Skill

Selecting a chat tile will invoke skill buttons to appear in your chat window. In this example, the “Review” chat tile was selected, and the “Review Documents” skill was triggered by clicking “Review Documents >”:

Document Content Checking Skills

Chat
Results


CoCounsel 7:26 PM  
 These skills can assist in checking content within your documents:

**Extract Contract Data**

Obtain precise information about the content of contracts, such as deal terms and key dates. Ask questions and CoCounsel provides a list of answers with relevant citations.

[Extract Contract Data >](#)

**Contract Policy Compliance**

Identify non-compliant contract language by providing a set of policies. CoCounsel finds conflicts, explains disparities, and suggests edits to align the clauses with current policies.

[Contract Policy Compliance >](#)

**Review Documents**

Ask complex questions about a batch of documents. CoCounsel prepares a substantive analysis with a list of supporting citations.

[Review Documents >](#)


### Step 4: Upload files, enter prompt, trigger skill

#### Document upload skills:

For skills that require document uploads, a purple box will appear for you to upload your files, select recently used files, or select files from your database. The skills in this category are: “Review Documents,” “Extract Contract Data,” “Search a Database” (will only run with the full database) and “Contract Policy Compliance”:

C Christine 7:40 PM  
I'd like to upload a document for review.

CoCounsel 7:40 PM  
You can upload files by selecting 'Upload new', 'Recent files', or 'My databases' below.



Drag and drop files  
or

[Upload new](#)
[Recent files](#)
[My databases](#)

**Supported files:** .doc, .docx, .eml, .msg, .pdf, .txt, .zip

Once your files have been uploaded, you can proceed to trigger the skill by prompting CoCounsel to run your skill of choice. You will know that your skill is ready to trigger when you see the purple “Submit request” button:

C Christine 1:55 PM  
**1 file added**  
PDF Consonni-Marco-Affidavit.pdf

CoCounsel 1:55 PM  
Great, you've uploaded the document named "Consonni-Marco-Affidavit.pdf." How would you like to proceed with this file? Do you have a specific request or query related to this document?

C Christine 1:55 PM  
review these documents

CoCounsel 1:55 PM Review Documents  
I understand you want to review these documents.

### Your questions

\* Question 1

\* Question 2

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

## Skills that don't require document uploads

For skills that don't require documents to be uploaded to trigger, selecting the skill tile will encourage you to enter your prompt in the chat to be ready to run. In the example below, the "Legal Research Memo" skill tile was selected under the "Research" skill category (available for CoCounsel All-Access users only):

The screenshot shows a chat window with a user message: "I'd like to start legal research." and a CoCounsel response: "I understand you want to start legal research." To the right of the chat is a skill tile labeled "Legal Research Memo". Below the chat is a form titled "Your request" with a "Prompt" input field (0/1000 characters), a "Date range" section with "Start year" (e.g. 1700) and "End year" (e.g. 2024) fields, and an "Include unpublished?" section with "No" (selected) and "Yes" radio buttons. At the bottom right are "Cancel" and "Submit request" buttons.

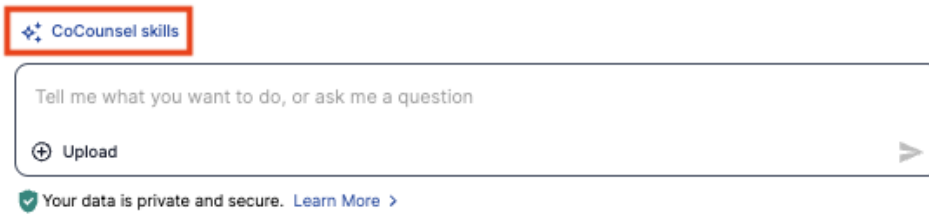
## Option 2: Discover skills through 3-star icon



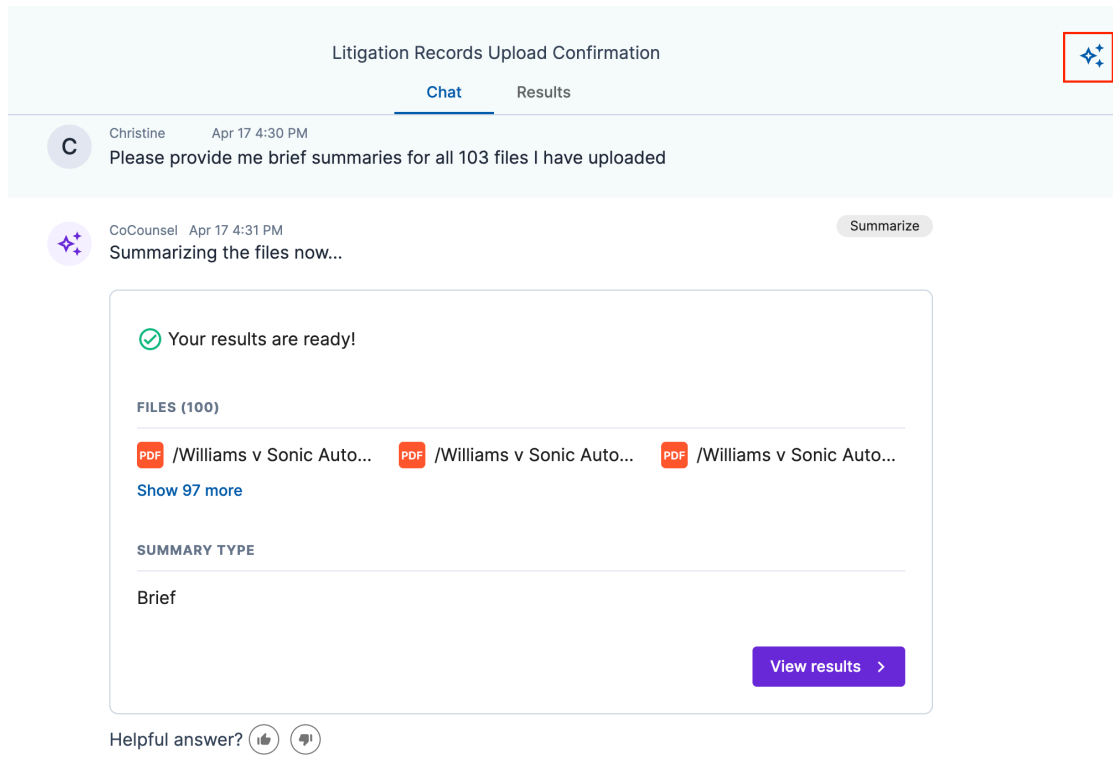
If you already have a chat window open, you can also find skills by selecting the 3-star icon on the right-hand sidebar or selecting "CoCounsel skills" that is located right above the chat window.

### Step 1: Select the 3-star icon

Select the 3-star icon: "CoCounsel skills" right above your chat window:



Or select the 3-star icon at the top right-hand corner of your screen.



## Step 2: Select a skill tile on the right-hand sidebar

After clicking the 3-star icon, a right-hand sidebar will appear where you can select a skill tile. These skill tiles are the same options detailed in **Option 1: Step 2: Select a chat tile.**

The screenshot shows a chat window titled "Litigation Records Upload Confirmation". The user, Christine, asks for brief summaries of 103 uploaded files. The CoCounsel bot responds with a "Summarize" button and a progress indicator. Below the chat, a results preview shows "Your results are ready!" and a list of files, including three PDFs titled "/Williams v Sonic A...". A "View results" button is visible. On the right, a sidebar titled "CoCounsel skills" lists four categories: Research, Review, Draft, and Summarize. The "Draft" category is highlighted with a red box.

### Step 3: Choose & trigger a skill

After selecting the correct skill tile pertaining to your use case, this will invoke skill buttons to appear in the right-hand sidebar of your chat. In this example, the "Draft" skill tile category was selected, and "Draft Correspondence" was chosen:

The screenshot shows a chat window titled "Document Content Verification Skills". The CoCounsel bot prompts the user to upload a document for summarization or compliance checking. Christine responds with "I'd like to upload a document to summarize." The CoCounsel bot provides instructions on how to upload files. Christine then adds a file, indicated by "1 file added". On the right, the "CoCounsel skills" sidebar is shown with a red box around the "Categories / Draft" link and another red box around the "Draft Correspondence" skill tile, which includes a description: "Produce a first draft of letters, emails, memos, and other documents that don't require strict formatting. Further refine your draft using CoCounsel's chat."

Depending on the skill you chose, you will either be prompted to upload your files or enter your prompt:

Christine 2:34 PM  
I'd like to draft correspondence.

CoCounsel 2:34 PM  
You would like to draft a piece of correspondence.

**Your request**

Request

Please draft a letter to recipients: .

Instructions:

55/3999 characters

Cancel **Submit request**

**Draft Correspondence**  
Produce a first draft of letters, emails, memos, and other documents that don't require strict formatting. Further refine your draft using CoCounsel's chat.

**Prepare for a Deposition**  
Identify topics and questions to prepare for upcoming depositions, witness interviews, surveys, and other investigative projects.

## Released: Enhancement - “Timeline” dual window view

After running the “Timeline” skill, you are now able to view results and the documents side-by-side in a dual window to match significant events to the actual location in the documents:

### Step 1: Run “Timeline” skill Upload your documents or select files from a database, and direct CoCounsel to generate a timeline.

Christine 3:16 PM  
**1 file added**

PDF Consonni-Marco-Affidavit.pdf

CoCounsel 3:16 PM  
What would you like to do with the uploaded file "Consonni-Marco-Affidavit.pdf"? If you are looking to create a timeline, I can assist with that.

Christine 3:17 PM  
**Generate a timeline**

CoCounsel 3:17 PM  
I understand you want to generate a timeline from the document.

Timeline

5% Complete

FILES (1)

PDF Consonni-Marco-Affidavit.pdf

Email me when complete Cancel **View results >**



## Step 2: Open “Timeline” Results, select pages

After running the “Timeline” skill, select the purple “View results” button:

CoCounsel 3:17 PM  
I understand you want to generate a timeline from the document.

Timeline

✓ Your results are ready!

FILES (1)

PDF Consonni-Marco-Affidavit.pdf

View results >

Helpful answer?

Here you will see the expanded view for “Timeline.” In the Results window, click on a event of your choosing:

Timeline I understand you want to generate a timeline from the document. X

Search... Filters Download Filtered Results Add File(s) to Timeline Actions

<input type="checkbox"/> Date	↑ Event Description	Source(s)
<input type="checkbox"/> April 30, 2009	The Italian Supreme Court issued a decision regarding Dr. Ferrari.	Consonni-M... (page 1) ↓
<input type="checkbox"/> September 13, 2012	WADA filed a request to the Public Prosecutor of Padua Dr. Benedetto Roberti to be admitted as a party in the investigative proceedings related to Dr. Ferrari and others.	Consonni-M... (page 1) ↓
<input type="checkbox"/> September 21, 2012	Dr. Benedetto Roberti granted WADA access to the investigative file related to Dr. Ferrari and others.	Consonni-M... (page 1) ↓
<input type="checkbox"/> October 4, 2012	Marco Consonni swore and affirmed that the foregoing statements in the affidavit are true to the best of his knowledge, information, and belief.	Consonni-M... (page 2) ↓
<input type="checkbox"/> Unclear	Dr. Ferrari conducted doping treatments to Filippo Simeoni, an Italian professional cyclist, from 1995 to 1997.	Consonni-M... (page 1) ↓
<input type="checkbox"/> Unclear	The Criminal Tribunal of Bologna condemned Dr. Ferrari for sporting fraud and abuse of the medical profession and acquitted him of other charges due to the statute of limitations in October 2004.	Consonni-M... (page 1) ↓
<input type="checkbox"/> Unclear	The Supreme Court of Italy analyzed the previous decisions of the Tribunal and the Court of Appeal of Bologna, establishing Dr. Ferrari's liability for sporting fraud and anti-doping violations although the statute of limitations applied.	Consonni-M... (page 2) ↓

Rows per page: 100 1-7 of 7 < >

## Step 3: Utilize Dual Window View Capabilities

After selecting documents from the “Timeline” results, you will see the dual window view of CoCounsel’s results on the left, and the uploaded document on the left:

Timeline | I understand you want to generate a timeline from the document.

Consonni-Marco-Affidavit.pdf Close document

185%

5. With its above mentioned decision, the Supreme Court analyzes the previous decisions of the case made by the Tribunal and by the Court of Appeal of Bologna and states that, while the statute of limitation operates in relation to the indictments contested to Dr Ferrari, there were clear "objective" evidences of Dr Ferrari liability for sporting fraud and violation of anti-doping rules with specific reference of prescription of doping medications to athletes (handwritten prescription of 6500 tablets of Dhea, tablets and vials of Androsten, *inter alia*).

I swear and affirm that the foregoing statements are true to the best of my knowledge, information and belief.

Dated this 4<sup>th</sup> day of October 2012

Avvocato Marco Consonni






October 4, 2012

Marco Consonni swore and affirmed that the foregoing statements in the affidavit are true to the best of his knowledge, information, and belief.

SOURCES

Filename	Date added	Size
Consonni-Marco-Affidavit.pdf (pg. 2)	May 22nd 2024	308.7 KB

In the dual window view there are various functions available to:

-  The double-arrow slider allows you to minimize/maximize the size of CoCounsel results or the document,
-  The triple-bar menu button enables you to Save, Print, or Download the document,
-  These buttons permit you to customize how you view the document by rotating, panning, and zooming in and out of the documents,
-  The magnifying glass supports searches for text in the document,
-  [Close document viewer](#) Allows you to exit the dual window view.