

CoCounsel Release Notes: 5/2/24

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: “Summarize” – Dual Window View

After running the “Summarize” skill, you are now able to view results and the documents side-by-side in a dual window for a more user-friendly experience.

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

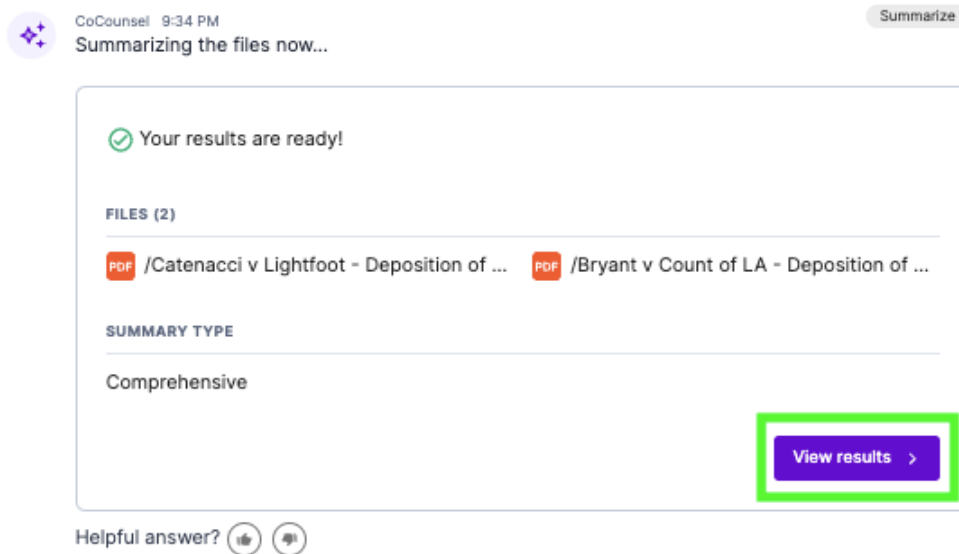
The screenshot shows a chat interface with the following elements:

- User Message (Christine Byon, 3:50 PM):** "2 files added" followed by two PDF icons and file names: "/Catenacci v Lightfoot - Deposition of Kat..." and "/Bryant v Count of LA - Deposition of Van...".
- CoCounsel Response (3:50 PM):** "I see that you've uploaded some deposition transcripts from an AllSearch Collection. How can I assist you with these files?"
- User Message (Christine Byon, 3:51 PM):** "Generate comprehensive summaries in these documents" (highlighted with a green box).
- CoCounsel Response (3:51 PM):** "I understand you want to generate comprehensive summaries for the uploaded deposition transcripts." (A "Summarize" button is visible to the right of the response).
- Confirmation Prompt:** "Please confirm the summary type ⓘ"
- Radio Buttons:** Three options are shown: "Brief", "Detailed", and "Comprehensive" (which is selected).
- Action Buttons:** "Cancel" and "Submit request" (highlighted with a green box).

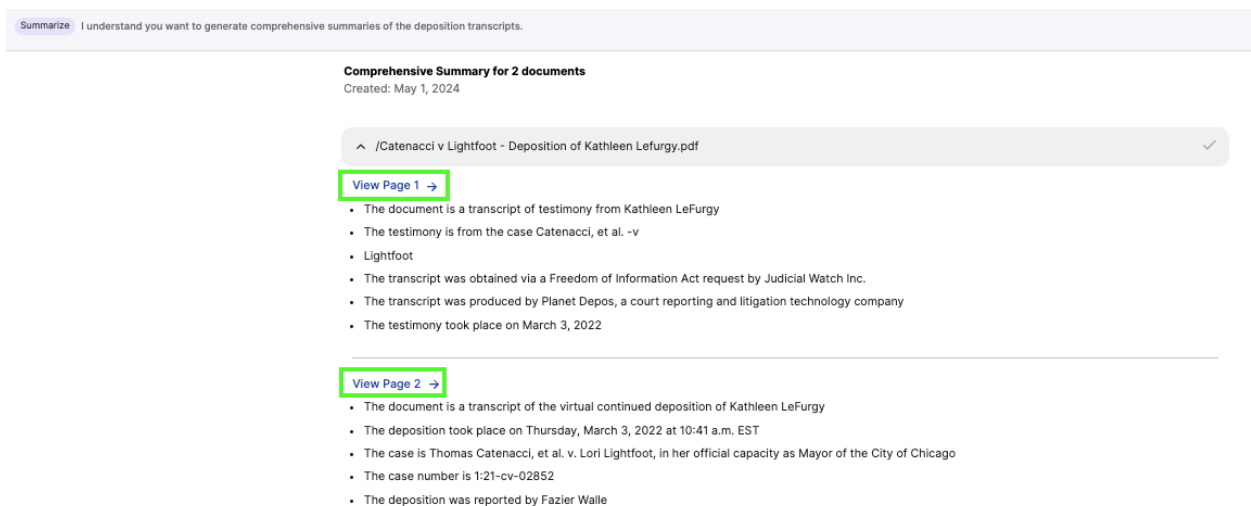
After confirming the correct uploaded documents and length type, click on the purple “Submit request” button.

Step 2: Open “Summarize” Results, select pages

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



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



Step 3: Utilize Dual Window View Capabilities

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

Summarize | I understand you want to generate comprehensive summaries of the deposition transcripts.

Comprehensive Summary for 2 documents
Created: May 1, 2024

^ /Catenacci v Lightfoot - Deposition of Kathleen LeFurgy.pdf ✓

View Page 1 →

- The document is a transcript of testimony from Kathleen LeFurgy
- The testimony is from the case Catenacci, et al. -v Lightfoot
- The transcript was obtained via a Freedom of Information Act request by Judicial Watch Inc.
- The transcript was produced by Planet Depos, a court reporting and litigation technology company
- The testimony took place on March 3, 2022

View Page 2 →

- The document is a transcript of the virtual continued deposition of Kathleen LeFurgy
- The deposition took place on Thursday, March 3, 2022 at 10:41 a.m. EST
- The case is Thomas Catenacci, et al. v. Lori Lightfoot, in her official capacity as Mayor of the City of Chicago
- The case number is 1:21-cv-02852
- The deposition was reported by Fazier Walle

View Page 3 →

- The document is a transcript of the testimony of Kathleen LeFurgy
- The deposition was conducted on March 3, 2022
- The deposition was taken before Fazier Walle, a shorthand court stenographer and notary public in Maryland

View Page 4 →

No relevant information was found to be summarized

View Page 5 →

No relevant information was found to be summarized

/Catenacci v Lightfoot - Deposition of Kathleen LeFurgy.pdf X Close document viewer






Obtained via FOIA by Judicial Watch Inc.

Planet Depos
We Make It Happen™

**Transcript of Kathleen LeFurgy,
Volume 2**

Date: March 3, 2022
Case: Catenacci, et al. -v- Lightfoot

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.

NEW: SEDAR Filings Database available for Canadian Customers

The SEDAR (System for Electronic Document Analysis and Retrieval) database containing filings from Canadian publicly traded companies, mutual funds, and

other issuers of securities is now available on CoCounsel. You can make searches on this database in CoCounsel for filings from 2017-2021.

Will the SEDAR Database be available for everyone?

SEDAR is available for Canadian CoCounsel customers only, and can be enabled for other users at your organization. Please contact your CSM or support@casetext.com to gain access for you and other users at your organization.

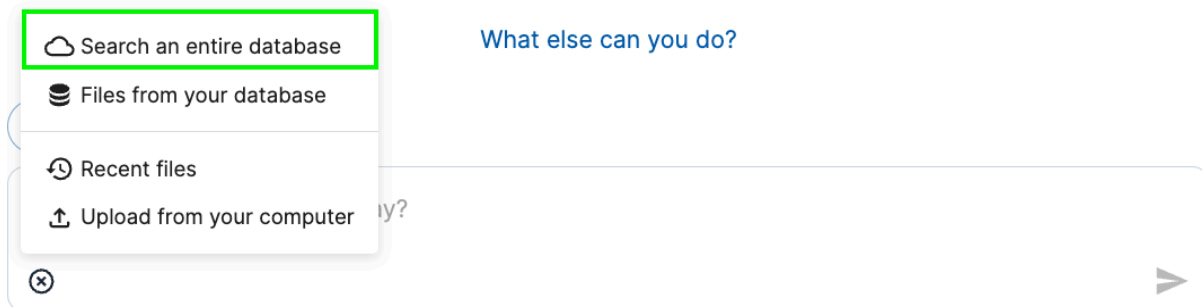
Steps for how to access SEDAR:

Step 1: Refresh your browser to see the SEDAR database

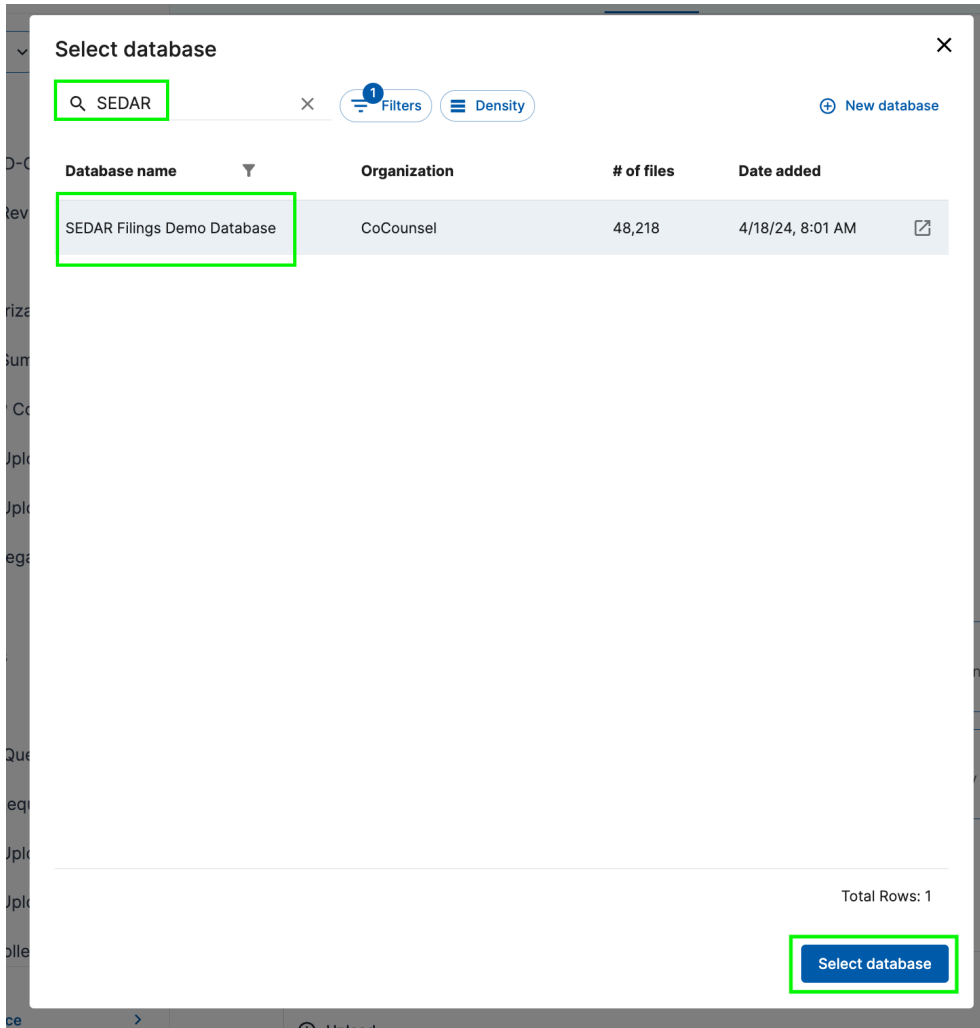
After gaining access to the SEDAR database, refresh your browser to ensure you see this database reflected in CoCounsel.

Step 2: Select entire SEDAR database, run “Search a Database”

In this option, click the “+ Upload” option in the chat window, and select “Search an entire database”:



A pop-up will appear showing all of your databases. You can use the filtering function to specifically find the “SEDAR Filings Demo Database”:



Click on the blue: “Select database” button.

Step 3: Run “Search a Database” on SEDAR:

Input your questions in the chat, and the “Search a Database” skill box will appear to confirm and trigger your search:

SEDAR Filings Demo Database Inquiry

Chat Results

C Christine Byon 6:38 PM
Database selected:
SEDAR Filings Demo Database

CoCounsel 6:38 PM
You've added the SEDAR Filings Demo Database. How may I assist you with it?

C Christine Byon 6:39 PM
Did any company admit to the need to correct statements made in a previous disclosure?
Did any company admit to the need to correct statements due to accounting errors made in a previous disclosure?

CoCounsel 6:39 PM
I understand you want to search for instances where a company admitted to correcting statements due to accounting errors in a previous disclosure.

[Search a Database](#)

Your request

Request

Did any company admit to the need to correct statements due to accounting errors made in a previous disclosure?
Did any company admit to the need to correct statements due to accounting errors made in a previous disclosure?

223/999 characters

[Cancel](#) [Submit request](#)

Either edit your question, or trigger “Search a Database” by clicking the purple “Submit request” button.

The results can be expanded and downloaded once the skill run completes:

>> Searching your database now... [Search A Database](#)

100% Complete

REQUEST [Hide original research request ^](#)

Did any company admit the need to correct statements due to accounting errors made in a previous disclosure?
Did any company admit to the need to correct statements due to accounting errors made in a previous disclosure?

RESPONSE **Answer from SEDAR Filings Demo Database**

Yes, multiple companies have admitted to the need to correct statements due to accounting errors made in a previous disclosure. For example, Greenbrook, Trulieve, and Petroteq all mention material misstatements or weaknesses that were corrected prior to the release of their annual financial statements. Other companies, such as PlantX Life Inc. and Valeo Pharma Inc., mention errors in press releases or filings that were later corrected. In some cases, the errors were immaterial and did not impact the company's financial statements, while in other cases the errors required restatement of financial statements or changes to accounting policies.

Documents [Select documents for follow-up](#)

[/03257992-00000001-00044945-C@#SEDAR#GreenbrookMDA-PDF.pdf](#) ^

"These control deficiencies are pervasive in impact and resulted in certain material misstatements to the Company's financial statements identified through the audit, and which were corrected by management. Identified errors resulted in certain adjustments to the amounts or disclosures included revenue, share-based compensation, contributed surplus, cash, accounts receivable, accounts payable and accrued liabilities, loans payable, Lender Warrants, and professional and legal fees. These errors were corrected prior to the release of our annual financial statements for the financial year ended December 31, 2020. The existence of these material weaknesses creates a reasonable possibility that an error may not be prevented or detected in the Company's annual or interim financial statements on a timely basis. We have established a remediation plan which includes the following specific remedial actions undertaken by management:"

[Page 28](#)

[/03301487-00000001-00008577-C@#Users#djh#SEDAR-Files#Trulieve#2021#Q3#Q3-10Q-PDF.pdf](#) ^

"As disclosed in "Note 2. Basis of Presentation" under "Revisions of Previously Issued Financial Statements" during the quarter ended September 30, 2021, management identified errors in the accounting for leases, asset acquisitions, and classification of assets. Management reviewed these errors identifying the root cause due to the control environment component of internal control as the Company did not maintain a sufficient complement of personnel with the appropriate level of knowledge, experience, and training in certain areas important to financial reporting."

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Is this helpful?

[Download](#) [Copy](#)

Step 4 (Optional): Select documents for detailed search

After “Search a Database” is completed, an optional step is to select documents from the skill run by clicking on the “Select documents for follow-up” button:



You can then proceed to select checkboxes for all or some of the documents from your “Search a Database” skill run. Once you have selected the documents, click on the blue “Submit” button:

Documents Select all [Submit](#) [Cancel](#)

[/03257992-00000001-00044945-C@#SEDAR#GreenbrookMDA-PDF.pdf](#) ^

"These control deficiencies are pervasive in impact and resulted in certain material misstatements to the Company's financial statements identified through the audit, and which were corrected by management. Identified errors resulted in certain adjustments to the amounts or disclosures included revenue, share-based compensation, contributed surplus, cash, accounts receivable, accounts payable and accrued liabilities, loans payable, Lender Warrants, and professional and legal fees. These errors were corrected prior to the release of our annual financial statements for the financial year ended December 31, 2020. The existence of these material weaknesses creates a reasonable possibility that an error may not be prevented or detected in the Company's annual or interim financial statements on a timely basis. We have established a remediation plan which includes the following specific remedial actions undertaken by management:"

[Page 28](#)

[/03301487-00000001-00008577-C@#Users#djh#SEDAR-Files#Trulieve#2021#Q3#Q3-10Q-PDF.pdf](#) ^

"As disclosed in "Note 2. Basis of Presentation" under "Revisions of Previously Issued Financial Statements" during the quarter ended September 30, 2021, management identified errors in the accounting for leases, asset acquisitions, and classification of assets. Management reviewed these errors identifying the root cause due to the control environment component of internal control as the Company did not maintain a sufficient complement of personnel with the appropriate level of knowledge, experience, and training in certain areas important to financial reporting."

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"During the quarter ended September 30, 2021, the Company identified an error in its accounting for leases which was due to the lack of a complete lease population and the conclusions reached for the commencement date for leases not aligning with the possession date of the associated right of use asset. This resulted in an understatement of the associated right of use assets and the associated lease liabilities. The Company also identified a misstatement related to the accounting for asset"



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"A "material weakness" is a deficiency, or a combination of deficiencies, in internal control over financial reporting such that there is a reasonable possibility that a material misstatement of our financial statements will not be prevented or detected on a timely basis. As disclosed in this Form 10-Q for the quarter ended September 30, 2021, our management team identified errors in the accounting for leases and asset acquisitions. Management reviewed these errors identifying the root cause due to the control environment component of internal control as the Company did not maintain a sufficient complement of personnel with the appropriate level of knowledge, experience, and training in certain areas important to financial reporting."

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The selected documents will appear in the chat, and you can choose to run “Summarize” or “Review Documents” on these specific files. In this example, “Summarize” was run as a follow-up skill:

C Christine Byon 7:02 PM
2 files added

 /03257992-00000001-00044945-C@#S...  /03301487-00000001-00008577-C@#Us...

 CoCounsel 7:02 PM
You have uploaded documents from the SEDAR Filings Demo Database regarding Greenbrook and Trulieve. How would you like to proceed with these documents? If you need to review them for specific information or questions, please let me know so I can assist you accordingly.

C Christine Byon 7:03 PM
Generate a brief summary on these documents

 CoCounsel 7:03 PM
I can generate a brief summary for the documents you uploaded.

Summarize

Please confirm the summary type ⓘ

Brief Detailed Comprehensive

Cancel

Submit request