

CoCounsel Release Notes: 7/19/23

Educational resources:

Read regularly-updated help articles and FAQs [here](#), watch video tutorials for every CoCounsel skill [here](#), register for our weekly Onboarding Webinar which demonstrates how to use each CoCounsel skill [here](#), or attend our live demo [here](#). A downloadable user guide is also available [here](#).

Resources:

We are working on a series of educational resources that address how attorneys can comply with their ethical obligations when using generative AI. As a starting point, the article available [here](#) explains how attorneys can comply with their ethical duties of confidentiality while using CoCounsel. Some courts have ordered lawyers to disclose their use of generative AI. We provide guidance to comply with these orders, and a list of court orders [here](#). A CLE webinar covering the ethical implications of generative AI is coming soon.

Recent Improvements:

“Review documents” results enhancements

“Review documents” now includes filters, column selection, and table density to the results page for a more focused experience.

Step 1: Finish “Review documents” query and select filters

Upon opening “Review documents” results, you will see the usual table format. At the top of the results page, you will see options to filter within the results table, shown in the [green](#) box in the screenshot below. This example uses witness affidavits from the USPS Pro Cycling Doping case from 2012.

9 reviewed documents

Uploaded | July 18, 2023

Summarize Documents

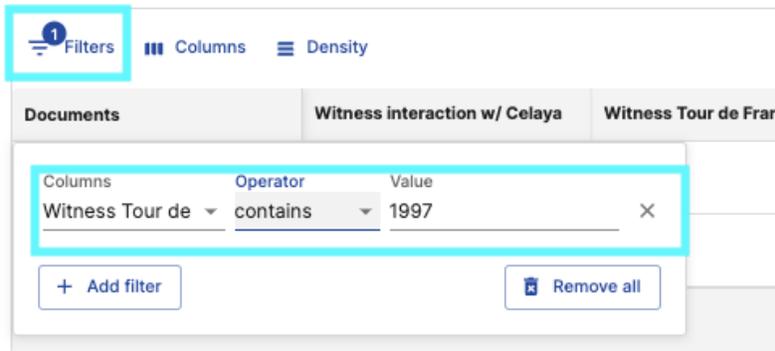
Filters Columns Density Click a row to see details.

Documents	Witness interaction w/ Celaya	Witness Tour de France year	Witness description of Armstrong	Witness relationship w/ Armstrong
Hamilton-Tyler-Affidavit.pdf	Team doctor	1997	Varied	Professional; complicated
Andreu-Frankie-Affidavit...	Team doctor	1998	Friend; interacted	Close, complicated
Swart-Stephen-Affidavit...	—	1995	Teammate; EPO	Teammates
OReilly-Emma-Affidavit.pdf	Mentioned; team doctor	1999	Varied; unclear	Varied
Danielson-Tom-Affidavit.p...	Medical treatments	Unknown	Varied; tense	Mixed
Bertagnolli-Leonardo-Wit...	—	—	—	—

Step 2: Filter, Select Columns, Table Density

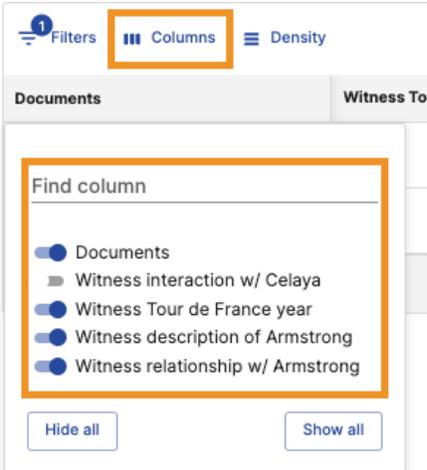
2a: Filter Option

Selecting the “Filter” option will allow you to narrow your results according to the column and value. In the blue box in the screenshot below, the filter narrows in on when the witness competed in the 1997 Tour de France:



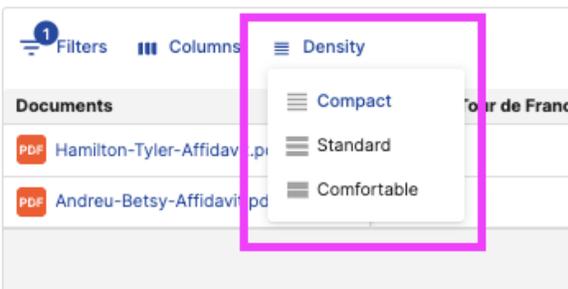
2b: Column Option

Selecting the “Column” option will allow you to delete unwanted columns by toggling the columns on/off shown in the orange box in the screenshot below. In this example, the “Relationship with Dr. Celaya” was toggled off. You also have the option to search for columns:



2c: Table Density

Depending on your preference, you can select the density of how compact you want the spacing to be. In the example below, the “Compact” spacing option was selected, shown in the pink box:



Linked skills from “Summarize” - “Review Documents”

You will soon be able to run other relevant skills such as “Review Documents” from the “Summarize” skill response. As featured in the [5/10 Product Update](#), you can currently run “Summarize” from “Review Documents.”

Step 1: Select “Follow-up Skill” in the dropdown

Upon completion of a query in “Summarize,” there will be a drop-down option (shown in the green box in the screenshot below) to run “Review documents” on your “Summarize” results:

The screenshot shows the 'Summarize' interface. At the top, a green bar indicates 'Summarize completed.' with a 100% progress bar. Below this, the 'REQUEST' section shows two PDF files: 'Fields v. Twitter, Inc.pdf' and 'privatejetservicesgroupvtwitter.pdf'. The 'RESPONSE' section displays a 'Detailed Summary' for 'Fields v. Twitter, Inc.pdf', including the text: 'Pages 1-3 > - Plaintiffs-Appellants Tamara Fields and Heather Creach are suing Twitter on behalf of the estates of their husbands, Lloyd "Carl" Fields, Jr. and James Damon Creach, respectively. - Fields and Creach were killed in an attack in Jordan on November 9, 2015, for which IS - Plaintiffs-Appellants allege that Twitter knowingly provided material support to ISIS in the form of Twitter accounts and direct-messaging services, which proximately caused their injuries. - Twitter moved to dismiss the case, and the district court granted the motion, ruling that Plaintiffs-Appellants failed to plead that they were injured "bv reason of" Twitter's conduct and that Twitter's liability was precluded by § 230 of the Communications'. To the right of the summary, a 'Follow-up Skill' dropdown menu is open, showing three options: 'Review Documents' (highlighted with a green box), 'Load a Brief Summary', and 'Load a Comprehensive Summary'.

You can also choose to produce different Summary lengths on the same document(s) in the “Follow-up skill” dropdown option.

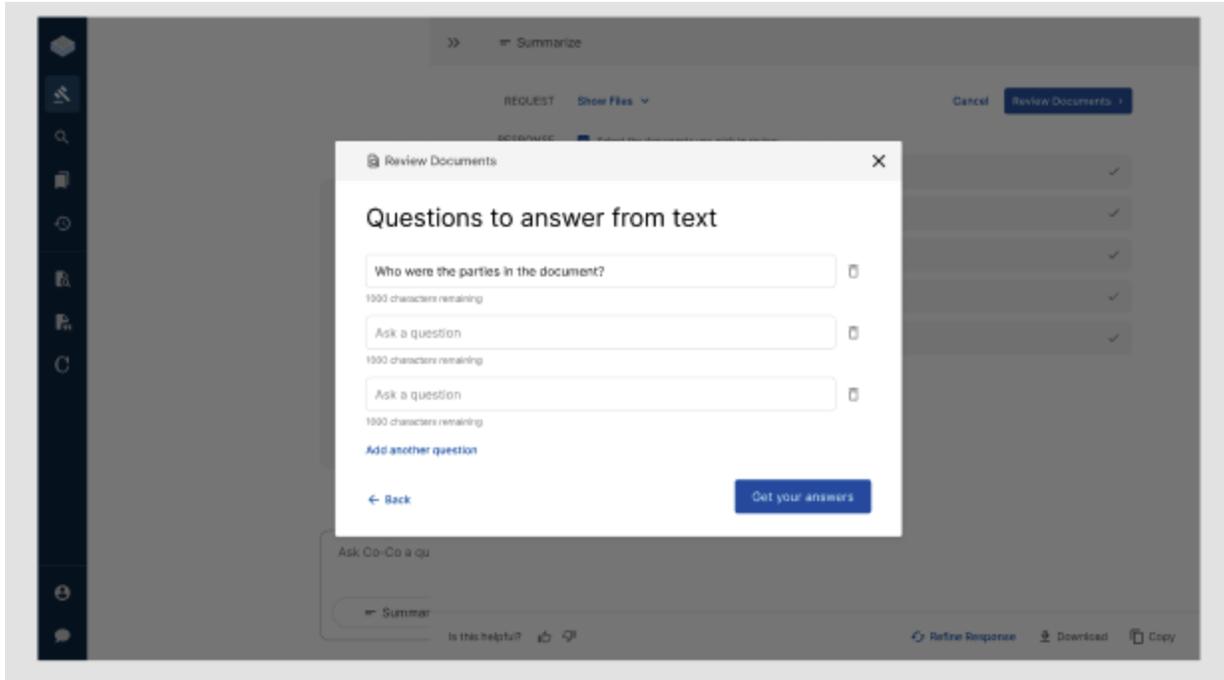
Step 2: Select document(s)

For “Summarize” runs with multiple documents, you can select specific or all documents to run in “Review Documents,” and click the “Review Documents” blue button (shown in the red boxes in the screenshot below):

The screenshot shows the 'Summarize' interface. The 'REQUEST' section shows the same two PDF files. The 'RESPONSE' section displays a 'Detailed Summary' with a 'Select the documents you wish to submit.' prompt. Below this, there are two checkboxes: 'Select all documents' (checked) and a list of documents with checkboxes: 'Fields v. Twitter, Inc.pdf' (checked) and 'privatejetservicesgroupvtwitter.pdf' (checked). To the right of the list, there is a 'Cancel' button and a blue 'Review Documents >' button (highlighted with a red box).

Step 3: Enter questions and run “Review Documents”

By selecting “Review Documents,” you can immediately trigger the skill and ask queries, shown in the modal below:



Step 4: View followup skill requests

Followup skill requests will appear at the top of the results page

>> Summarize

○ Reviewing 2 documents View

1%

REQUEST Show files ▾

2 reviewed documents Summarize Documents ▾

Uploaded | July 19, 2023

Documents	Document parties	Ruling
Fields v. Twitter, Inc.pdf	Plaintiffs, Twitter, amici	Dismissed
privatejetservicesgroupvtwitter.pdf	PJS, Twitter	—

Rows per page: 20 ▾ 1-2 of 2 < >

Step 5: Expand results for followup skill

Upon clicking on any of the cells in the “Review documents” table, you can also view the detailed output of the results:

The screenshot shows a document review window titled "Fields v. Twitter, Inc.pdf" with a close button (X) in the top right corner. Below the title is a "View Document" link. The main content is organized into sections:

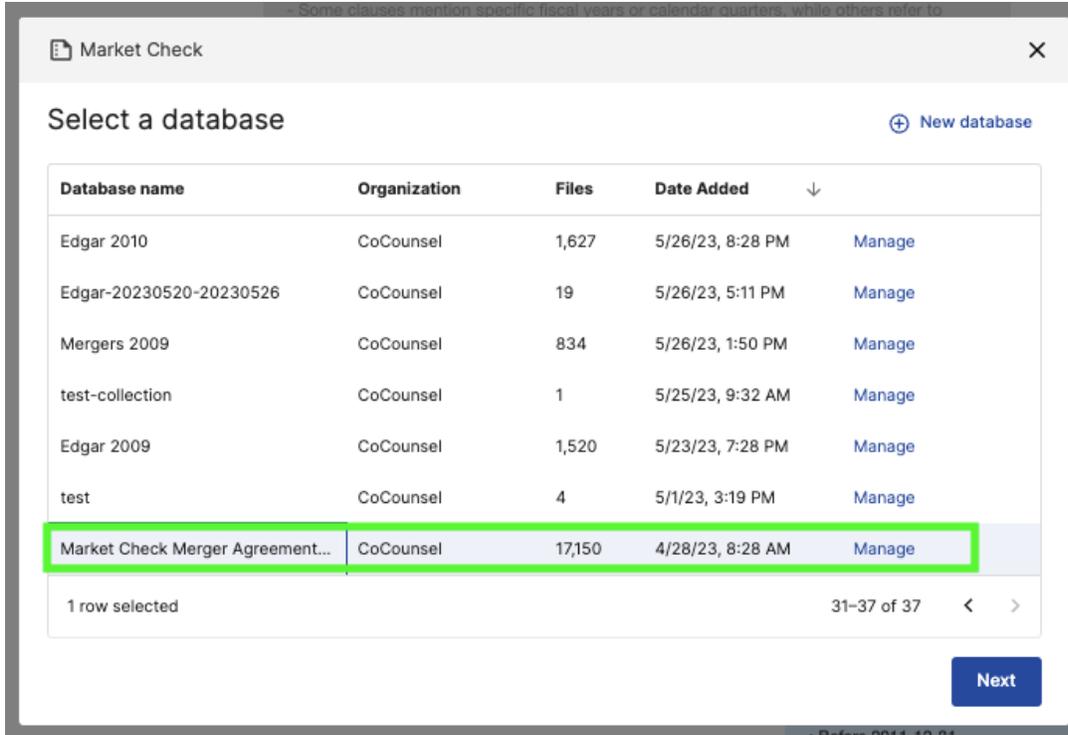
- Who were the parties in this document?**
 - Plaintiffs, Twitter, amici**
 - The plaintiffs-appellants are Tamara Fields, Heather Creach, J.C. (1), and J.C. (2), while the defendant-appellee is Twitter, Inc. (pgs. 1-4, 7-9). There are also several amici curiae, including the Electronic Frontier Foundation, the Center for Democracy & Technology, the Internet Association, and Floor 64 Inc. (pgs. 1-3).
 - [Show Sources](#)
- What was the ruling?**
 - Dismissed**
 - The district court dismissed the case because the plaintiffs failed to plead that they were injured "by reason of" Twitter's conduct, and because Twitter's liability was precluded by the Communications Decency Act (pg. 2). The court also clarified that a plaintiff must show a direct relationship between injuries and the defendant's acts (pg. 4). The dismissal was affirmed because the plaintiffs did not adequately plead proximate causation (pg. 10).
 - [Show Sources](#)

At the bottom left, there is a button labeled "Summarize this Document" with a dropdown arrow. At the bottom right, there are navigation links: "< Previous" and "Next >".

Market check – EDGAR M&A Database now includes 2009

An option in “Market check” is to use publicly available mergers and acquisitions 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. **This database includes mergers from 2009-2023.**

When you launch the “Market check” skill in CoCounsel, you can select the “Market Check Merger Agreements” database (shown in the **green** box):



Release notes web page - Product Updates

You can now access these “Release notes” for up-to-date information about product enhancements and new functionalities in CoCounsel. “Release notes” are updated weekly every Wednesday or Thursday, and can be accessed here: <https://casetext.com/release-notes/>.

Release notes

7/12/23	<ul style="list-style-type: none"> Released: Create a database in “Search a database” Admin controls - Member permissions, “Market check” - M&A DB now includes 2017 Forthcoming: Linked skills from “Summarize” 	Release notes (.pdf)
6/28/23	<ul style="list-style-type: none"> Released: Manage member permissions in admin (select accounts only at this time), create a database in Search a Database Forthcoming: Linked skills from Summarize, manage databases from Search a Database 	Release notes (.pdf)
6/22/23	<ul style="list-style-type: none"> Released: Create a database in “Search a database” Admin controls - Member permissions, “Market check” - M&A DB now includes 2017 Forthcoming: Linked skills from “Summarize” 	Release notes (.pdf)
6/14/23	<ul style="list-style-type: none"> Released: “Legal research memo” - Jx - date filtering & publication status “Market check” - M&A DB now includes 2018 Forthcoming: Admin controls - Member permissions, Create a database in “Search a database” 	Release notes (.pdf)