Room Six: Legal Research with AI

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INTRODUCTION & ICEBREAKER

Task:	We are going to conduct a Cross-Database Comparison and become familiar with Legal Database AI Tools.
Fictional Research Goal:	**Problem:** A national Am-Law 50 firm must quickly advise its partners on how every U.S. jurisdiction currently regulates—or is about to regulate—attorneys' use of generative AI tools (e.g., ChatGPT, CoCounsel) in legal practice. Partners need to know whether disclosure to clients is mandatory, whether court rules or statutes prohibit certain AI use, and which states have pending bills that could change the landscape. **Core research question:** "What authority (statute, bar opinion, court rule, or pending bill) governs lawyers' use of generative AI in each jurisdiction, and what does it require?" The answer must be accurate as of today and supported by primary citations. We will run this *single* question across several AI platforms to compare depth, citation quality, and ease of use. Every demo below leverages

Retrieval-Augmented Generation (RAG). This means that AI cites live database documents instead of static training data

Our Prompt:

When comparing AI tools, we should submit the **same natural-language question** to each platform. We will avoid roleplaying instructions or excessive formatting because Westlaw and Bloomberg recommend simple, conversational queries sites.psu.edu. The following prompt strikes a balance between specificity and clarity while leaving room for each AI tool to structure the answer:

Universal Prompt:

> For each U.S. state and the District of Columbia, identify any statutes, court rules, ethics opinions or pending legislation that regulate lawyers' use of generative artificial-intelligence tools (for example ChatGPT or CoCounsel). Summarize what each authority requires—such as mandatory disclosure, restrictions, or pending bills—and cite the controlling authority for each jurisdiction.

Quick Chat Icebreaker:

1. "In the chat, **type the name of the AI legal research platform you're most curious about today** (Westlaw, Lexis, Bloomberg, Hein, or other). Go!"
2. "Now, **type the single verb that best describes what humans must do after any AI answer**."
3. "Last one—**give one emoji or word that captures how you feel about AI in legal research right now**."

Segment	Estimated time	Description
Introduction & overview	5 min	Explain RAG and the need for verification.

Westlaw Precision AI	10 min	Demonstrate AI-Assisted Research and AI Jurisdictional Survey; discuss Co-Counsel.
Lexis+ AI (Protegé)	10 min	Show how to access Protegé, run the prompt, review results and limitations.
Bloomberg Law AI	10 min	Demonstrate Bloomberg Law Answers and AI Assistant; highlight iterative chats and verification.
HeinOnline AI tools	5 min	Explain non-generative AI enhancements (More Like This, Keyword Search Builder, PathFinder, etc.).
Comparing results with a large-language model	5 min	Export results, use ChatGPT to compare findings across databases, and discuss variations.
Q&A and wrap-up	15 min	Return to the main room and share your experience

ROLES

- **Leader:** share your screen and serve as the live demo feed.
- **Instructions Monitor:** Another participant should be assigned to monitor these written instructions as the AI Guide walks you through the steps below. AI has been given strict orders to follow these instructions, but it makes mistakes just like us.
- **Time-Keeper:** You have 45 minutes to work through this exercise. Please mind the clock.
- **Everybody Else**: Get your database logins ready and follow along on your own device.

PART ONE: BRIEF STATEMENT ABOUT RAG

Generative AI models like ChatGPT have sparked intense interest in the legal profession. Leading legal research databases are incorporating AI-powered tools using *retrieval-augmented generation* (RAG) to ground responses in their proprietary content. While these tools accelerate research, they are far from foolproof.

Here's What You Need to Keep in Mind:
Recent benchmarking shows that Lexis+ AI and Westlaw's AI-Assisted Research hallucinated answers **17–34% of the time** hai.stanford.edu. Vendors stress that users must independently verify AI-generated results using citators and primary sources sites.psu.edu. Due to time constraints, we will not have the time in this exercise to do a proper human (expert)-verification of our AI results. We recommend that you spend time after this workshop practicing this very important final polishing skill.

PART TWO: WESTLAW PRECISION + AI

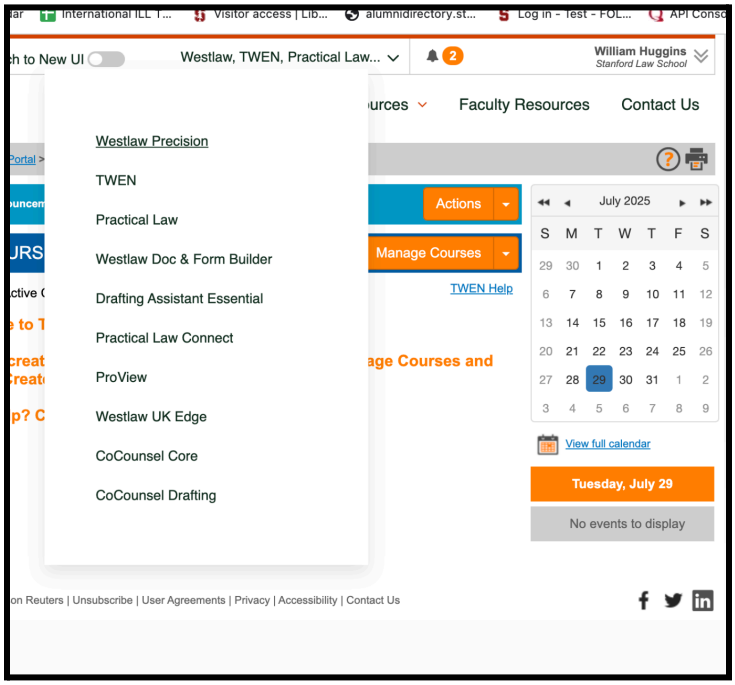
NOTES

Unique Features and Limitations	Best Practices for Prompting
• **AI-Assisted Research** – offers a conversational search bar that returns a narrative answer with annotated primary-law citations. Good for quick overviews but not a replacement for comprehensive research. • **AI Jurisdictional Survey** – generates a multi-jurisdiction survey of statutes or regulations based on a natural-language questionsites.psu.edu. You can choose which jurisdictions to include. • **Claims Explorer & Practical Law summariser** – help identify claims and summarise practice guidance (optional for this lesson). • **Co-Counsel** – an integrated tool that can summarise documents, compare documents, create timelines, and draft briefs. It accepts uploaded documents such as the PDF generated from an AI survey. • **Current limitations** – Westlaw AI cannot find documents by citation, filter results by court or date, or draft documents; it is not suited for complex analytics	• Provide relevant facts but avoid extraneous names or details; too many specifics can mislead the AI. • Keep the query simple and avoid instructing the AI to perform tasks like “make a table”. • Focus on one issue at a time; break complex fact patterns into multiple questions. Always verify citations using KeyCite or another citator

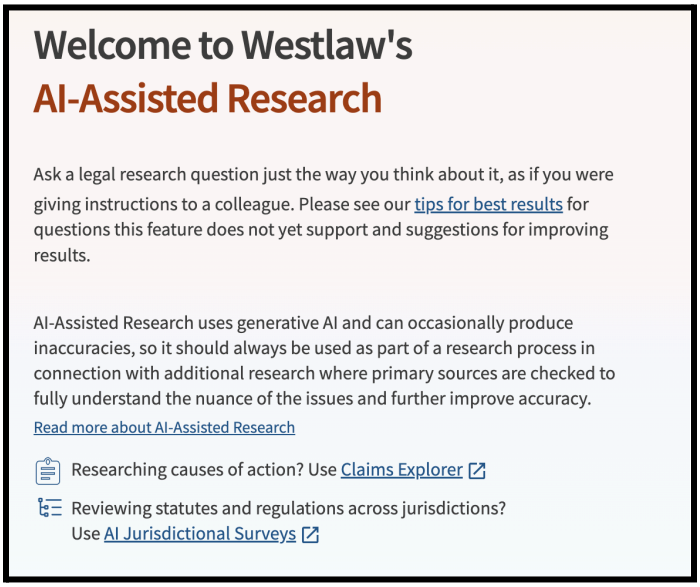
EXERCISE STEPS

1. **Log in to Westlaw Precision**. Use your credentials at lawschool.westlaw.com and switch to the *New UI* if you land on the old UI. There is a toggle button at the top of the page.

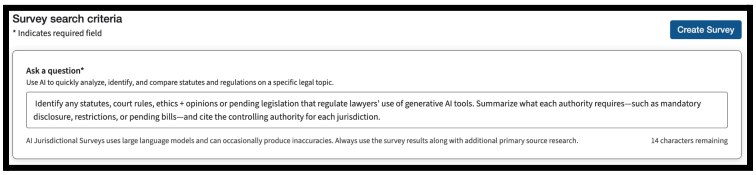
   Change from “Twen” to Westlaw Precision



2. **Access AI Jurisdictional Survey**. On the homepage, look for a link labelled *AI Jurisdictional Surveys* in the welcome panel or under **Tools**. Click the link; you don’t need to type a query first.



3. **Enter our universal prompt**. Paste the prompt below into the chat box.



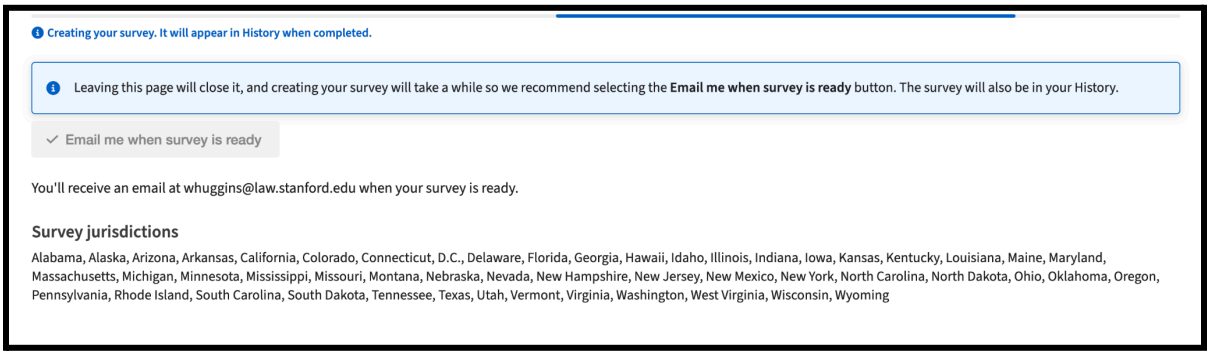
PROMPT:

Identify any statutes, court rules, ethics + opinions or pending legislation that regulate lawyers' use of generative AI tools. Summarize what each authority requires—such as mandatory disclosure, restrictions, or pending bills—and cite the controlling authority for each jurisdiction.

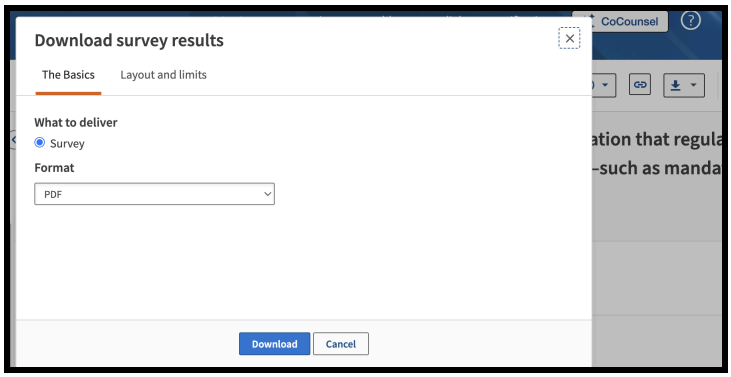
4. **Select jurisdictions**. In the **Select Jurisdictions** panel, click *Select All*, then deselect jurisdictions you don't need (e.g., federal, Guam, Puerto Rico, Virgin Islands).



5. **Create the survey**. Click **Create Survey**. Westlaw will display a message stating that the survey is in progress. You can click **Email me when the survey is ready** to receive notifications. Wait for the results to populate.



6. **Download the survey**. Once the results are ready, download the survey as a **PDF**.



7. **Review results**. Read the AI-generated summary and the list of authorities. Each entry should include a citation to statutes, court rules or

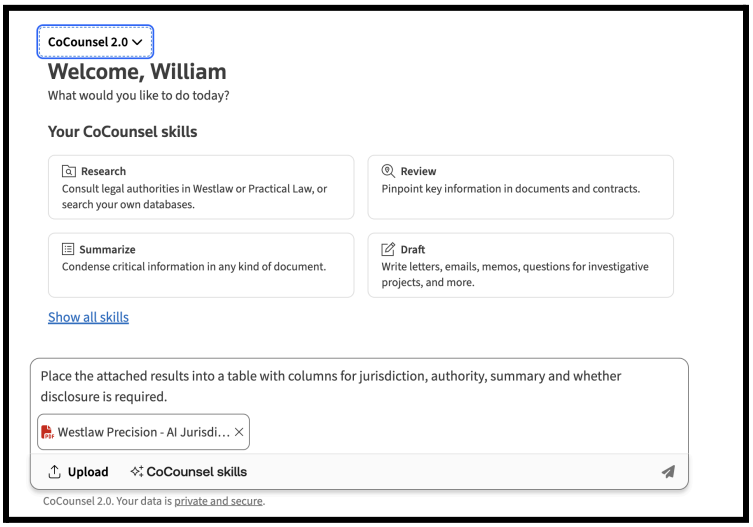
IN THE REAL WORLD, YOU WOULD STOP HERE TO HUMAN VERIFY - NEVER SKIP THIS STEP WHEN CONDUCTING REAL RESEARCH.

ethics opinions.

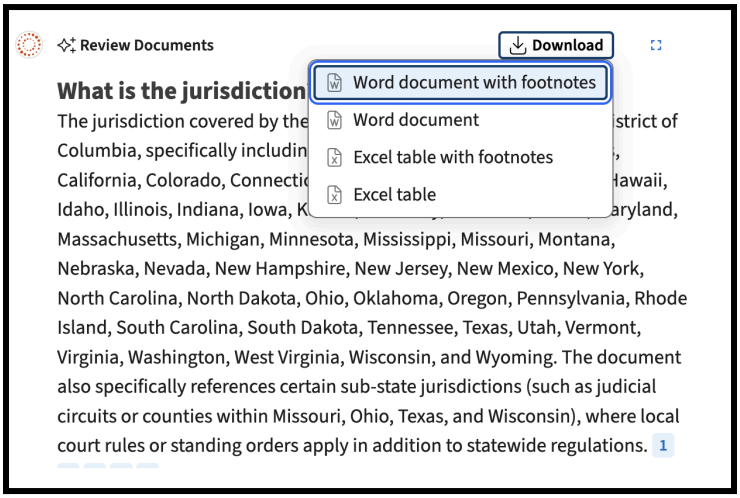
If we had more time, we would use **KeyCite** to verify each authority's currency (red/yellow flags, negative treatment, etc.).

8. **Analyze with Co-Counsel**. Open **Co-Counsel** via the floating icon (bottom-right). Upload the downloaded PDF and ask it to reformat the survey as follows:

   Place the attached results into a table with columns for jurisdiction, authority, summary and whether disclosure is required.

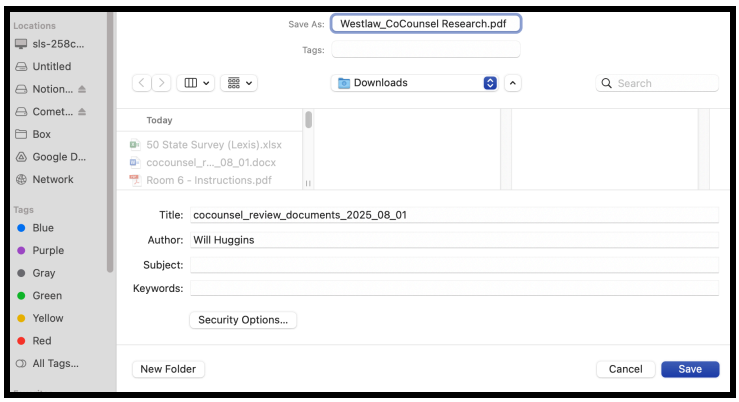


9. Download the results as a Word Document with footnotes.



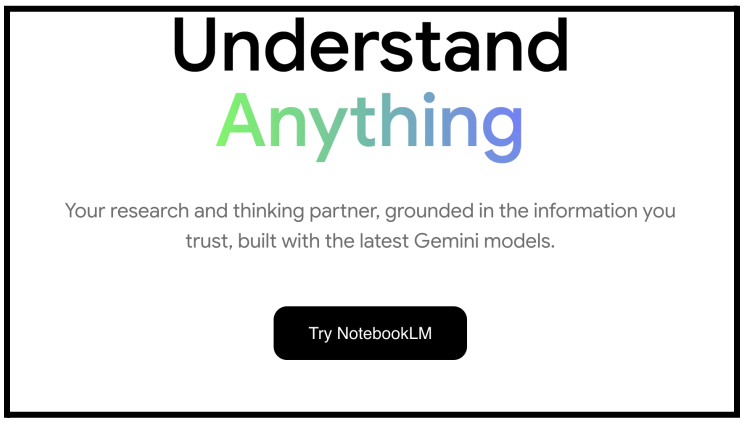
10. Open the Word Doc and print and save it as a PDF.

    The next step doesn't accept doc files so we need to convert it. While doing this rename the file as "Westlaw_CoCounsel_Research"

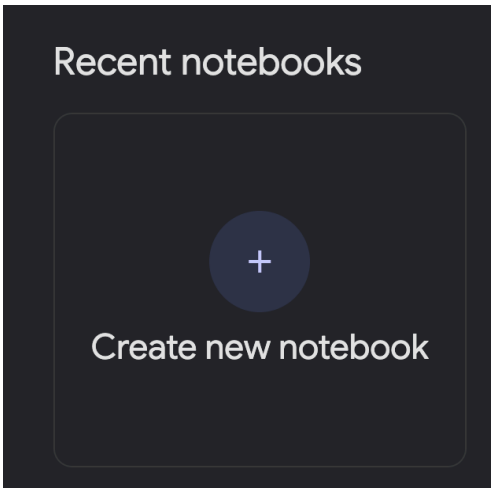


11. Go to https://notebooklm.google

    Click on "Try Notebook"

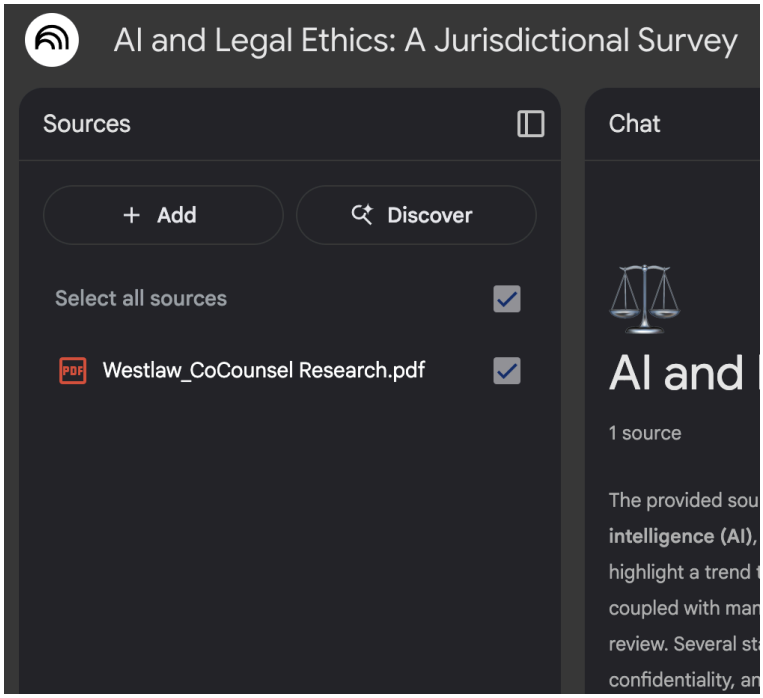


12. Click Create New Notebook



13. Upload your PDF as a source.

    Leave Notebook LM open. We will return to it to add other sources.



PART THREE: LEXIS+ AI (Protégé)

NOTES

Unique Features and Limitations	Best Practices for Prompting
• **Ask a Legal Question** – interactive chat that answers legal questions with citations and allows up to 10 follow-up prompts per conversation. • **Generate a Draft** – produces first drafts of legal documents (memos, motions, client letters, etc.). Drafting features may vary by subscription level. • **Summarize a Case** – summarises a case by name or citation, or summarises authorities supporting an answer. Researchers should check that the summary isn't simply reproducing headnotes, as one review found this problem nationalmagazine.ca. • **Upload a Document** – available to commercial customers; allows document analysis and summarisation lexisnexis.com. • **Personalisation and privacy** – Users can adjust personalisation settings and the system does not share user data lexisnexis.com. • **Limitations** – Lexis+ AI still hallucinates, and a law professor reported non-existent	Lexis's **Law School Integration Guide** recommends treating the interaction like a conversation: include context, be clear and specific, and state the desired output. Unlike Westlaw, Lexis encourages providing detailed prompts and using follow-up questions to refine results. However, because follow-ups are limited to ten per conversation, craft your initial question carefully.

legislation and verbatim headnotes in his tests nationalmagazine.ca. Users should beware of results without hyperlinks.	

EXERCISE STEPS

14. **Log in to Lexis+** at lawschool.lexis.com using your credentials and click **Go to Lexis+**.



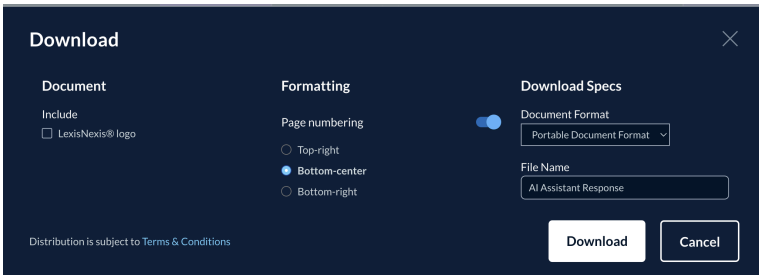
PROMPT:
Identify any statutes, court rules, ethics + opinions or pending legislation that regulate lawyers' use of generative AI tools. Summarize what each authority requires—such as mandatory disclosure, restrictions, or pending bills—and cite the controlling authority for each jurisdiction.

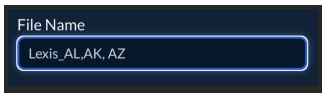
15. **Review the results.** Lexis provides a jurisdiction-by-jurisdiction summary with citations. Note any authorities that lack hyperlinks; those may be hallucinations or errors

IN THE REAL WORLD, YOU WOULD STOP HERE TO HUMAN VERIFY - NEVER SKIP THIS STEP WHEN CONDUCTING REAL RESEARCH.

16. **Save your results** by clicking the download option underneath the chat results. Save as "Lexis_State 1, State 2, State 3"

    Lexis Zips the file so you will need to unzip them before uploading them to Notebook Lm (Our Next Step)



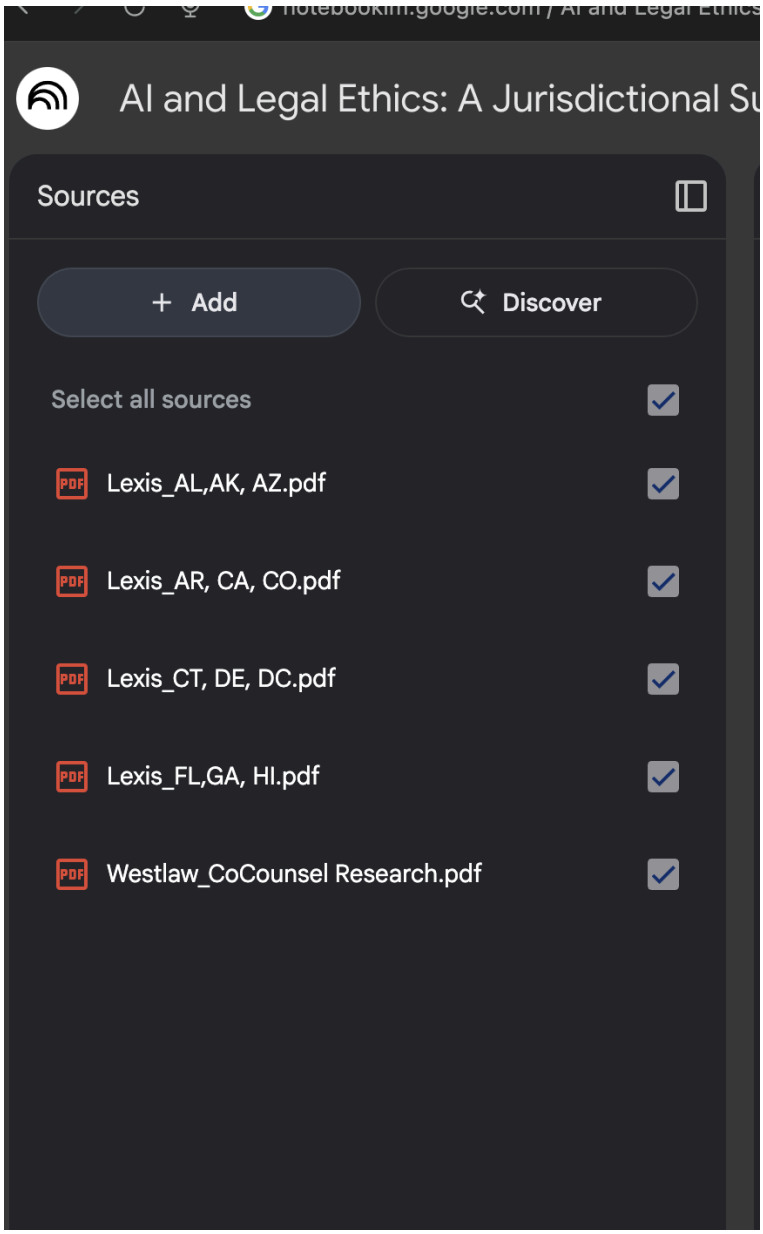


17. Return to Notebook LM. Click on Add Sources and drag and drop all your Lexis Results.

    As your sources increase, you will see the importance of taking the time to come up with a file naming scheme.

    Now, we should have 18 sources in our Notebook LM. **Notice that you can check and uncheck sources which essentially allows you to turn sources on and off depending on your future chat queries.**

    Let's move on to Bloomberg Law.



PART FOUR: BLOOMBERG LAW AI

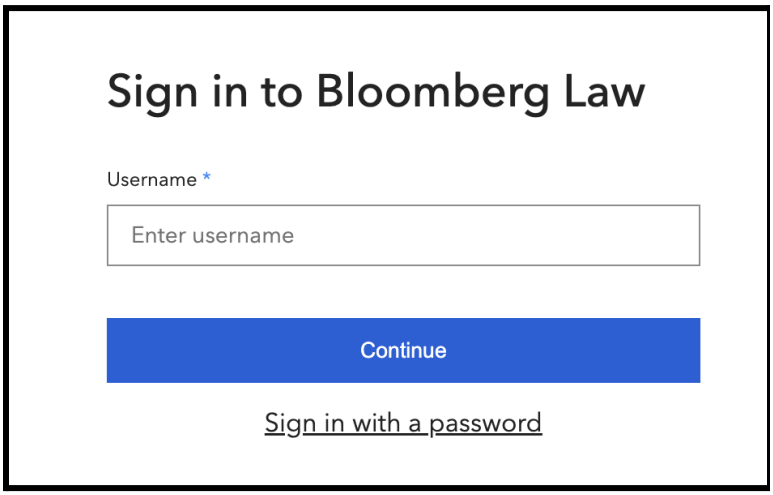
NOTES

Unique Features and Limitations	Best Practices for Prompting
• **Bloomberg Law Answers** – appears at the	Bloomberg recommends writing **natural-language**

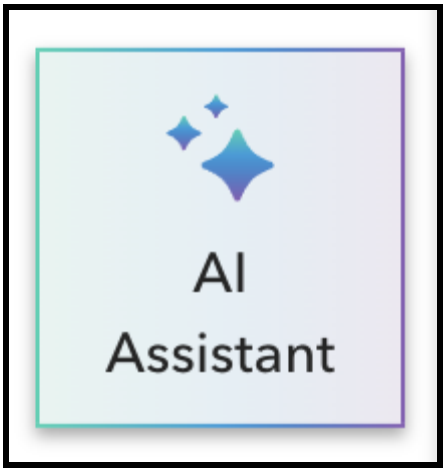
top of search results (opt-in). It provides a concise answer with extensive citation support lawnext.com. Answers are grounded solely in Bloomberg Law's content; the AI refuses to answer questions outside its scope. • **AI Assistant** – a chat panel accessible when viewing a document. It can summarise a document, answer targeted questions about it and now supports broader research conversations with iterative follow-ups prnewswire.com. It stores chat history and allows jurisdiction-specific filters and charts-building for cross-jurisdiction comparisons. • **One-click verification** – citations are embedded as footnotes; clicking them opens the source for verification. • **Guardrails and prompt shields** – the tool uses internal content only and declines inappropriate questions.	**queries**, specifying jurisdiction when relevant and using **precise language** sites.psu.edu. Because the AI includes chart functionality, avoid over-formatting your initial prompt; ask follow-up questions to request charts or filters after receiving the first answer.

EXERCISE STEPS

18. **Log in to Bloomberg Law** at www.bloomberglaw.com with your credentials.



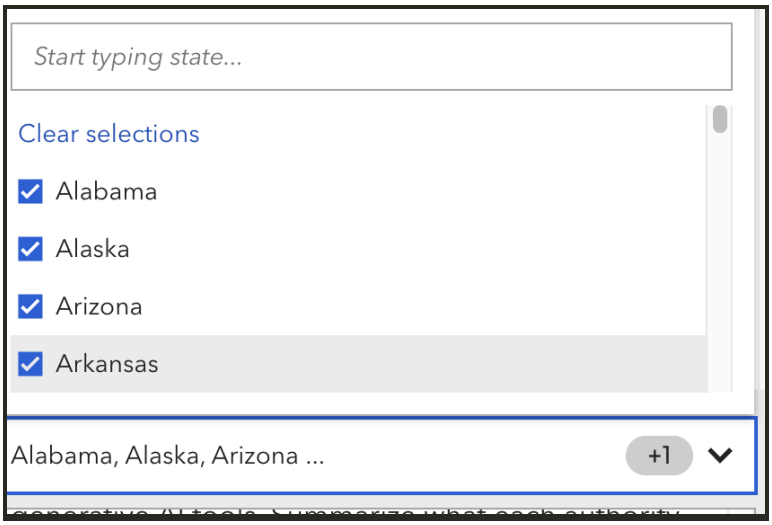
19. **Activate AI tools.**
    Ensure you opt in to Bloomberg Law Answers (if a toggle appears). Click the AI Assistant icon (often a speech bubble) on the right-hand side.



20. **Submit the universal prompt.** In the AI Assistant chat, paste the universal prompt. The assistant will generate a summary for each jurisdiction with citations.

    Make sure you select all the states before submitting your prompt.

    Note: D.C. is not available.

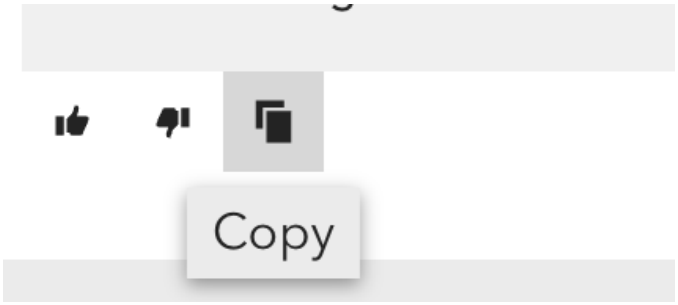


PROMPT:
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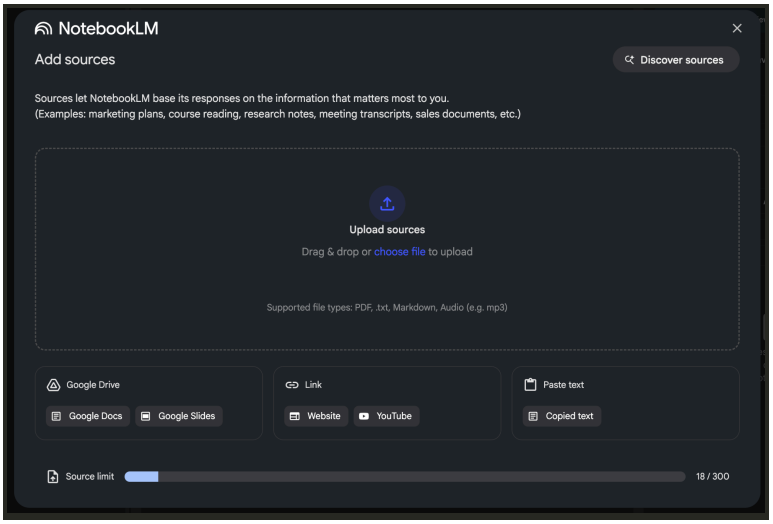
21. **Review the results.**
    Lexis provides a jurisdiction-by-jurisdiction summary with citations. Note any authorities that lack hyperlinks; those may be hallucinations or errors

IN THE REAL WORLD, YOU WOULD STOP HERE TO HUMAN VERIFY - NEVER SKIP THIS STEP WHEN CONDUCTING REAL RESEARCH.

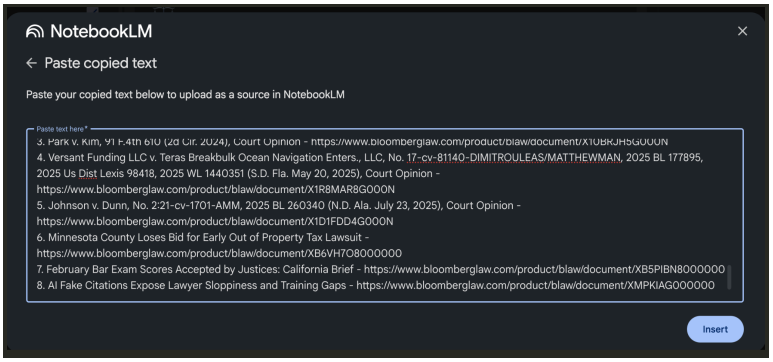
22. Click the copy button underneath the results. Bloomberg doesn't have a good export option currently.

23. 

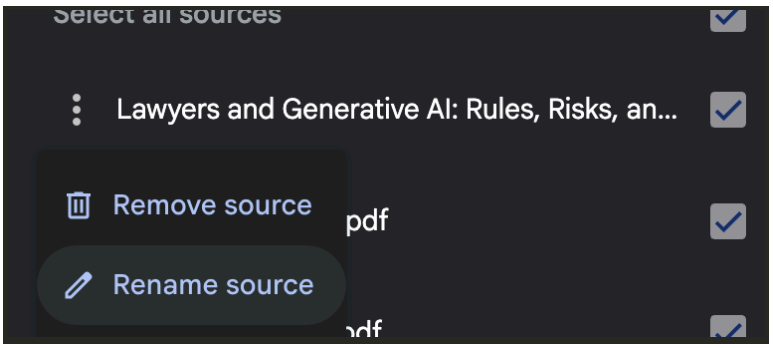
24. Go to Notebook LM, click on Add Source and select the option for copied text.



25. Paste in your results from Bloomberg Law and click "Insert."



26. Click on the three dots next to the source and rename this as "Bloomberg_Research"



PART FIVE: HEINONLINE AI & NLP TOOLS

NOTES

Unlike the other platforms, HeinOnline **does not** yet offer a conversational generative-AI assistant. Instead, it embeds AI/NLP features to enhance discovery. These tools can help you refine searches and identify related materials, complementing results from generative systems.

We will not explore these features in this exercise, so you can skip to Part Six, and review this section later.

Key AI-enhanced tools

Tool	Purpose	How to use
More Like This	Finds articles similar to a selected article by extracting "interesting words" and ranking the top 50 related items libguides.heinonline.org.	Click *More Like This* inside an article; adjust the list of interesting terms to refine results.
Keyword Search Builder	Allows users to build a complex search by entering keywords/phrases and assigning boost values libguides.heinonline.org.	From *Advanced Search*, select *Keyword Search Builder*; input weighted terms and run the search.
Explore This Author	Uses metadata and machine learning to display an author's most-discussed subjects, co-authors and citation relationships libguides.heinonline.org.	Click an author's name; review subjects, co-author network, and cited works; use facets to filter.
Entity Extraction	Identifies locations, persons and organisations in articles, allowing results to be filtered by these entities libguides.heinonline.org.	After running a search, use the *Location*, *Person* and *Organization* facets to narrow results.
PathFinder	Utilises NLP and machine learning with human curation to map over 1,500 narrow legal subjects into a multi-level taxonomy libguides.heinonline.org.	Use the *PathFinder* facets in search results to browse research subjects and refine queries.

PART SIX: COMPARING RESULTS USING NOTEBOOK LM

27. Now, we are at the fun part. Let's go to the Notebook LM Chat and run some queries on our research results. You can create your own or use the recommendations below.

PROMPTS TO TRY

1a. *Uncheck the Bloomberg and WestLaw Results. Then run this prompt just on our Lexis Files:*

> Summarize the findings by each state and return five bullets for each of them:
> - Regulates generative-AI? Yes or No
> - Authority type (statute / court rule / bar opinion / bill)
> - Effective or pending date (YYYY-MM or "Pending")
> - Doctrine stance (Strict / Moderate / Silent)
>
> Do not skip any state. If there is nothing to report for a state, state that, but do not skip it. List your findings in alphabetical order by state.

1b and 1c. Perform the same prompt as above for WestLaw and then again for Bloomberg.

PROTIP: You can save each search as a note and then convert the note to a source. You could name it like this: Lexis:Prompt 1. If you only do this for the 17 Lexis files, you will be able to check that new source, WestLaw, and Bloomberg and perform comparisons.

Here is a prompt for that:

> Compare the results from Bloomberg_Research, Westlaw_CoCounsel, and Lexis:Prompt 1

2. *Locate the most recent appellate case in [JURISDICTION] that discusses ethical risks of AI-assisted legal drafting. Summarize the holding in 75 words or fewer, list the top three authorities it relies on, and note whether the decision is published or unpublished.*

3. Identify the primary statute that governs lawyers' use of generative AI in **[JURISDICTION]**. Provide the statutory citation, the section title, and a two-sentence summary of its key requirements. End with an inline link or citation to the full text."

4. Write a 150-word plain-English explanation of how AI can and cannot be used in legal research under the current rules in **[JURISDICTION]**. Aim the explanation at a first-year associate.

5. Produce a step-by-step checklist (6–8 items) a law firm should follow before submitting AI-generated content to a court in **[JURISDICTION]**. Each item should reference the controlling authority or rule by citation.

6. Given the current AI rules in **[JURISDICTION]**, list three common law-firm workflows that remain **unaddressed** by existing authority. For each gap, suggest one credible secondary source for further guidance.

7. List every mandatory disclosure or certification requirement that a lawyer must meet when using generative AI in client work in **[JURISDICTION]**. Flag any provision that carries a specific sanction or fine.

8. Draft a 120-word ‘safe-harbor’ paragraph a law firm can insert into engagement letters to clients, explaining the controlled use of generative AI tools. Base the language on the governing professional-conduct rules in **[JURISDICTION].**

9. Suggest a Boolean search string that retrieves all documents discussing ‘hallucination’ AND ‘legal citation’ within AI ethics materials for **[JURISDICTION]**. Explain briefly why each term or connector is included.

10. List the five most authoritative secondary sources (treatises, law-review articles, practice guides) on AI legal ethics relevant to **[JURISDICTION]**. Provide full citations and one-sentence abstracts.

11. Using legislative and regulatory signals in **[JURISDICTION]**, predict two likely developments in AI legal ethics over the next 12 months and cite the bills, comments, or agency statements that support each prediction.

12. Outline a client advisory memo (section headings only) that alerts corporate clients to AI-related legal-practice risks in **[JURISDICTION]**. Under each heading, list 2–3 bullet points of content you would include.

BONUS THINGS TO TRY

Trying generating a mindmap, FAQ, briefing doc, audio, or video overview in Notebook LM.

CONCLUSION

AI-powered tools offer promising efficiencies for legal research, but they are still **experimental and imperfect**. Therefore, law librarians and researchers must:

- **Formulate effective prompts** – clear, conversational questions tailored to the tool's guidelines. Avoid instructing the AI to perform complex formatting tasks.

- **Understand each tool's capabilities** – Westlaw's AI Jurisdictional Survey and Co-Counsel, Lexis's Protegé tasks and follow-up limits, Bloomberg's AI Assistant with chart-building, and HeinOnline's discovery aids.

- **Verify all AI output** – review cited authorities, use citators such as KeyCite or Shepard's, and consult multiple sources.

- **Respect privacy and ethics** – do not upload confidential or client information; follow institutional guidelines <https://uit.stanford.edu/security/responsibleai>.

Thank you for participating in this learning exercise. You will be redirected to the main room to share your experience at the 45 minute mark. If time permits, you can spend any excess time verifying your findings.