

FACT SHEET

# HaystackID<sup>®</sup> CoreFlex<sup>™</sup>

A Unified, Secure, and Scalable eDiscovery Interface

HAYSTACK<sup>®</sup>



# Unlocking Your Future of eDiscovery Today

HaystackID® CoreFlex™ is an advanced, cloud-native eDiscovery interface designed to streamline legal workflows, optimize operational efficiency, and enhance compliance for law firms, corporations, and government agencies. With a single-pane-of-glass experience, CoreFlex eliminates the inefficiencies of fragmented platforms, providing a secure and scalable solution for managing legal data and discovery processes.

By automating, structuring workflows, and using near-real-time analytics, CoreFlex ensures that legal teams can navigate complex data challenges with greater accuracy, speed, and cost-effectiveness. Seamless authentication, role-based access controls, and compliance-ready security measures reinforce CoreFlex as a trusted and adaptable solution in the ever-evolving legal technology landscape.

Designed with flexibility in mind, CoreFlex enables organizations to self-manage eDiscovery workflows while retaining the ability to transition seamlessly to full-service support when needed. This hybrid approach ensures that legal teams maintain complete control over their operations, reducing reliance on third-party vendors and eliminating unnecessary workflow disruptions.

With scalability, security, and ongoing innovation as its core pillars, CoreFlex offers a future-proof solution tailored to the unique demands of legal professionals. Whether handling high-volume litigation, regulatory investigations, or compliance audits, CoreFlex provides the tools to enhance efficiency, improve decision-making, and adhere strictly to industry standards.

# HaystackID CoreFlex

## The Power of a Unified eDiscovery Ecosystem

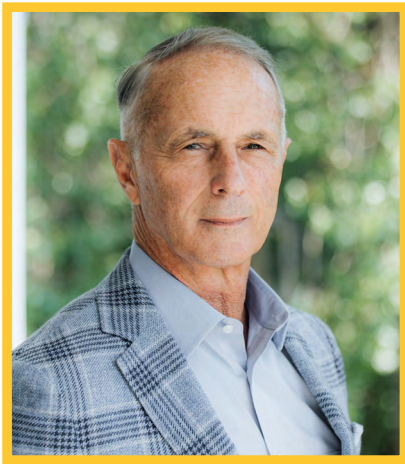
HaystackID CoreFlex is a centralized and secure eDiscovery interface designed to streamline legal matter management, user access, data workflows, and reporting within a single, comprehensive system. Developed for law firms, corporations, and government agencies, CoreFlex offers an automation-first approach that enables organizations to self-manage eDiscovery workflows while maintaining the flexibility to transition seamlessly to full-service support when needed. With a focus on operational efficiency, CoreFlex eliminates the challenges associated with fragmented solutions by providing a single-pane-of-glass experience that ensures ease of use without compromising security or compliance.

Built on a cloud-native infrastructure using Microsoft Azure, CoreFlex supports auto-scaling to handle high-volume workloads while maintaining optimal performance. The interface integrates with industry-standard tools, such as Relativity, Nuix, and Rampiva, and offers planned support for advanced artificial intelligence solutions, including Relativity aiR, eDiscovery AI, and HaystackID ReviewRight® Global Managed Review. Future integrations will extend CoreFlex's capabilities into cyber discovery and eDiscovery collection tools, including HaystackID's Mobile Elite Discovery and Analysis Lab (MEDAL™), Remote Endpoint Analysis and Data Intelligence (READI™), and Protect Analytics AI®. This approach ensures that CoreFlex remains adaptable to evolving client needs while maintaining a commitment to regulatory compliance through adherence to SOC 2, GDPR, and CCPA standards.

CoreFlex features Secure Authentication and Access capabilities, Single Sign-On (SSO), role-based access controls, and compliance-ready security measures. These features enable organizations to manage user authentication efficiently while ensuring that only authorized personnel can access sensitive legal data. With SSO support for Okta, Google Authentication, and Microsoft 365, CoreFlex simplifies access management while aligning with industry-leading security frameworks to maintain data integrity and regulatory compliance.

### KEY TAKEAWAYS

1. Single-pane-of-glass interface simplifies eDiscovery workflows.
2. Automation-first approach enhances efficiency and flexibility.
3. Cloud-native infrastructure on Microsoft Azure ensures scalability and high performance.
4. Integration with industry-standard tools such as Relativity, Nuix, and Rampiva.
5. Planned support for AI-driven document review with Relativity aiR and eDiscovery AI.
6. Secure authentication and access with SSO, role-based permissions, and compliance-ready security.
7. Regulatory compliance with SOC 2, GDPR, and CCPA for data privacy and security.



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*CoreFlex is a transformative solution for legal data management. By offering a single-pane-of-glass view, the new interface consolidates matters, user management, and analytics into a single comprehensive system. This approach empowers legal professionals to swiftly and efficiently address operational and regulatory challenges.*

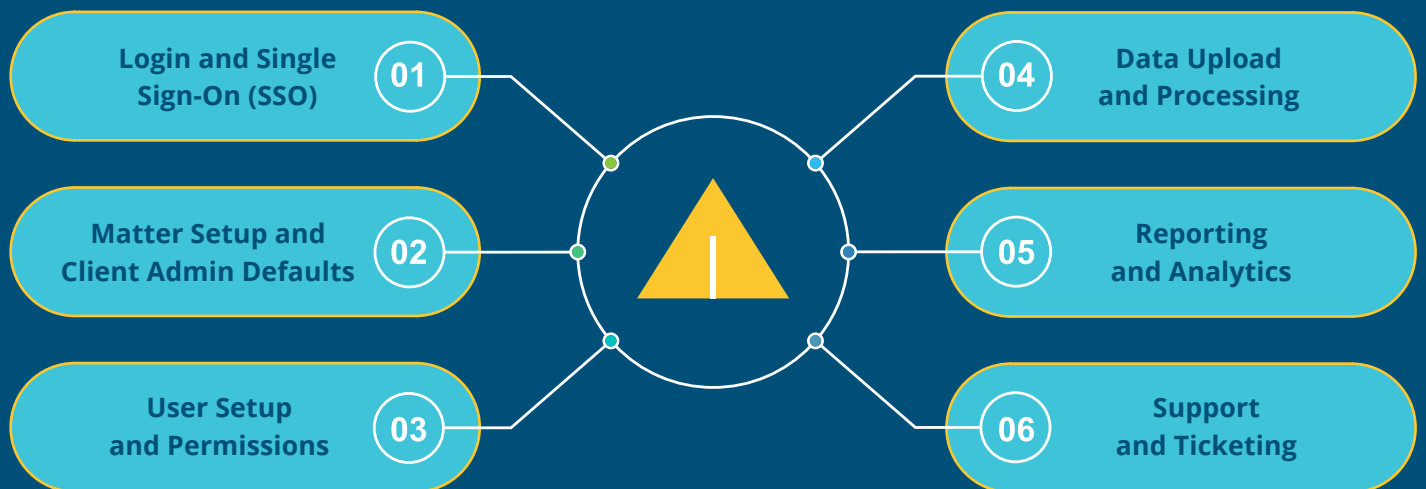
*Hal Brooks, CEO at HaystackID*

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## The CoreFlex Workflow From Ingestion to Insight

CoreFlex is designed to streamline the eDiscovery process through a structured operational workflow that enhances efficiency, security, and scalability. The interface’s intuitive design ensures a seamless transition between self-service and managed service capabilities, allowing legal teams to maintain operational control and compliance while scaling dynamically to meet workload demands. The workflow comprises six key stages, each contributing to a more efficient, automated, and transparent legal discovery process.

# CoreFlex™ WORKFLOW



- 1. Login and Single Sign-On (SSO):** Secure access to the CoreFlex interface is enabled through integrated authentication mechanisms, including SSO compatibility with Okta, Google Authentication, and Microsoft 365. Role-based access controls ensure that only authorized users can access case data and administrative functions, maintaining strict security protocols while allowing seamless user authentication.
- 2. Matter Setup and Client Admin Defaults:** CoreFlex provides a guided process for establishing new legal matters within the interface. Predefined templates and configurable defaults streamline matter creation, ensuring consistency in settings such as time zones, deduplication rules, and security protocols. By automating administrative tasks, CoreFlex minimizes overhead and enables legal teams to initiate workflows efficiently.
- 3. User Setup and Permissions:** Administrators can assign roles and define user-specific permissions, ensuring that users have access only to the data and workflows necessary for their responsibilities. CoreFlex's granular permission controls enhance security and prevent unauthorized access while optimizing workflow efficiency by aligning user access levels with case-specific requirements.
- 4. Data Upload and Processing:** Legal teams can securely ingest data into CoreFlex with automated processing workflows handling tasks such as data validation, indexing, deduplication, denisting, and OCR processing. Built-in error handling mechanisms proactively identify and resolve ingestion issues, ensuring that data is processed quickly and accurately without disruption.
- 5. Reporting and Analytics:** Once data processing is complete, CoreFlex provides near-real-time insights into matter progress, resource utilization, and legal review status. Embedded Power BI dashboards offer customizable and scheduled reporting options, allowing legal teams to generate actionable intelligence while maintaining complete oversight of their eDiscovery processes. By consolidating data from multiple sources into a single reporting interface, CoreFlex enhances transparency and informed decision-making.
- 6. Support and Ticketing:** CoreFlex includes an integrated Zendesk-based support system that provides real-time assistance for legal teams needing technical support, workflow guidance, or troubleshooting assistance. This built-in support infrastructure ensures that users can resolve issues efficiently, reducing disruptions and maintaining uninterrupted operations throughout the eDiscovery lifecycle.

## KEY TAKEAWAYS

1. Secure login and authentication with SSO and role-based access controls.
2. Automated matter setup ensures consistent and efficient workflows.
3. Granular user permissions enhance security and access control.
4. AI-driven data processing automates ingestion, validation, and OCR.
5. Near-real-time reporting provides full transparency into legal workflows.
6. Integrated support and ticketing ensure seamless issue resolution.



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*Input from legal and technical experts was central to CoreFlex's design. The interface's customizable workflows and pre-configured templates optimize matter management while preserving security. With an integration-rich roadmap, CoreFlex was developed to adapt to the evolving demands of legal data management. The single-pane-of-glass experience is the cornerstone of this approach, delivering clarity and precision in managing complex data. Moreover, the flexibility to integrate with various platforms and protocols ensure that organizations can seamlessly align the interface with their unique technological environments.*

**Aaron Pribil, Senior Product Manager at HaystackID**

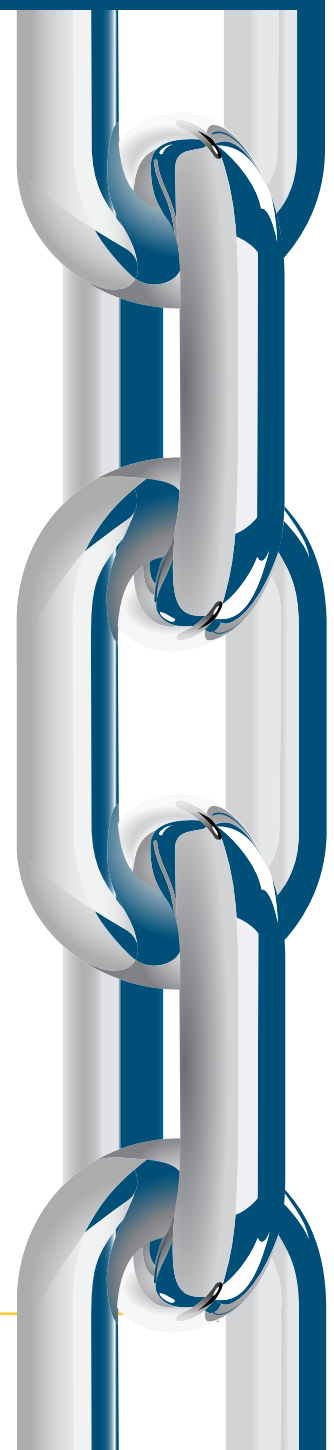
## Why CoreFlex? A Smarter Way to Manage eDiscovery

CoreFlex delivers significant operational and financial advantages, offering legal teams an integrated solution that enhances productivity, security, and cost efficiency while ensuring compliance with the industry regulations. By consolidating eDiscovery workflows into a single, automated interface, CoreFlex provides seamless case management, faster review cycles, and improved resource allocation.

The simplified interface reduces complexity by integrating all eDiscovery tasks into one intuitive environment. Legal professionals no longer need to navigate multiple platforms or switch between disconnected systems, allowing for streamlined operations and reduced administrative burden.

The automation process eliminates friction between data ingestion, document processing, and legal review, ensuring that legal teams can move from data collection to case analysis more efficiently. By reducing reliance on manual interventions and increased automation, CoreFlex minimizes the time to review and increases overall efficiency.

The cost efficiency of CoreFlex is driven by automation and AI-powered analytics, which helps eliminate redundant processes and reduce manual workload. By leveraging intelligent workflows and predictive data management, CoreFlex helps legal teams control costs while maintaining accuracy and consistency in legal workflows.

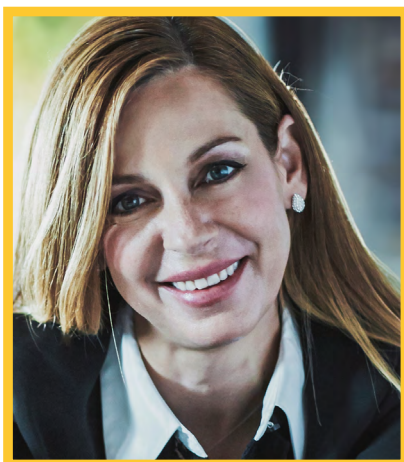


The scalability and security of CoreFlex are reinforced by its cloud-based architecture, which allows for dynamic resource allocation based on case complexity and workload demands. Built on Microsoft Azure, CoreFlex auto-scales ensure uninterrupted performance during peak processing periods while adhering to global security standards such as SOC 2, GDPR, and CCPA. Security features, including encryption at rest and in transit, role-based access controls, and audit logging, ensure that sensitive legal data remains protected at all times.

The commitment to ongoing innovation ensures that CoreFlex continues to evolve in response to industry trends and client needs. Regular updates introduce new features, system enhancements, and client-driven optimizations, ensuring that legal teams can always access cutting-edge eDiscovery capabilities.

## KEY TAKEAWAYS

1. All-in-one interface eliminates the need for multiple eDiscovery tools.
2. Automation allows us to simplify your workflow from data ingestion to loading your data to your matter.
3. Cost-efficient workflows reduce operational overhead while improving accuracy.
4. Scalable cloud-native design adjusts dynamically to workload fluctuations.
5. Comprehensive security framework ensures compliance with SOC 2, GDPR, and CCPA.
6. Regular product enhancements ensure continuous innovation and adaptation.



“CoreFlex was built to meet the evolving needs of modern legal teams. By integrating advanced AI, automation, and cloud-native architecture, the interface delivers the flexibility and efficiency required to manage complex eDiscovery workflows. Its seamless transition between self-service and full-service support ensures organizations maintain control while optimizing security, compliance, and operational performance. With a commitment to ongoing innovation, CoreFlex is designed to adapt and scale, providing legal professionals with the tools they need to work smarter, faster, and with greater confidence.

**Andrea Wallack, President at HaystackID**

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# CoreFlex and HaystackID

## Leading Next-Generation eDiscovery

HaystackID is a global provider of eDiscovery and legal technology solutions, specializing in data intelligence, regulatory compliance, and AI-driven legal workflows. The company is recognized for its ability to deliver secure, scalable, and innovative solutions that address the complex challenges faced by law firms, corporate legal teams, and government agencies.

With CoreFlex, HaystackID is redefining the legal technology landscape by offering an interface that blends self-service control with the flexibility of full-service support. Unlike traditional solutions that require complicated migrations or rigid infrastructure, CoreFlex enables legal teams to dynamically scale their operations while ensuring compliance and cost-effectiveness.

The CoreFlex interface is designed to support legal teams of all sizes, providing an intelligent, automated, and adaptable approach to managing eDiscovery tasks. With its secure authentication protocols, AI-driven automation, near-real-time analytics, and cloud-native architecture, CoreFlex empowers legal professionals to take control of their eDiscovery workflows with confidence and efficiency.

As legal teams continue to seek cost-effective and scalable solutions that enhance operational efficiency while maintaining strict security and compliance, CoreFlex stands out as a transformative solution for the future of eDiscovery.

### KEY TAKEAWAYS

1. HaystackID is a leader in legal technology solutions, offering AI-driven, cloud-based services to enhance eDiscovery workflows.
2. CoreFlex provides a hybrid model, allowing organizations to seamlessly switch between self-service and full-service support as needed.
3. The intelligent, automation-driven interface optimizes case management, security, and efficiency, reducing reliance on external vendors and outdated workflows.
4. CoreFlex is purpose-built for scalability, innovation, and compliance, supporting legal teams in navigating complex eDiscovery and regulatory landscapes.



# Learn More. Today.

[Contact us today](#) to learn more about how HaystackID CoreFlex™ can transform your legal workflows. We invite you to schedule a live demonstration and explore the full capabilities of this next-generation eDiscovery interface.

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## **About HaystackID®**

[HaystackID](#) solves complex data challenges related to legal, compliance, regulatory, and cyber events. Core offerings include Global Advisory, Data Discovery Intelligence, HaystackID Core® Platform, and AI-enhanced Global Managed Review powered by its proprietary platform, ReviewRight®. Repeatedly recognized as one of the world's most trusted legal industry providers by prestigious publishers such as Chambers, Gartner, IDC, and Legaltech News, HaystackID implements innovative cyber discovery, enterprise solutions, and legal and compliance offerings to leading companies and legal practices around the world. HaystackID offers highly curated and customized offerings while prioritizing security, privacy, and integrity. For more information about how HaystackID can help solve unique legal enterprise needs, please visit [HaystackID.com](#).

*Assisted by GAI and LLM Technologies*