CaseBot® for HaystackID® Core Intelligence AI™

A GenAI-Powered Conversational Assistant for Case Insight™

HAYSTACK®

Conversational Early Case Intelligence from Day One

In high-stakes legal and investigative matters, teams must rapidly transform complex data into defensible insight to inform strategy, negotiations, and litigation decisions.

CaseBot® is a proprietary technology of eDiscovery AI®, made available to HaystackID® clients as part of the Core Intelligence AI Case Insight™ offering.

Operating as an embedded assistant within the Case Insight environment, CaseBot moves early case intelligence beyond static dashboards and keyword-based searches to a dialogue-driven experience. Attorneys, investigators, and review managers can quickly:

- **Validate** key facts and timelines.
- **Surface** relevant communications, custodians, and issues.
- **Explore** themes and context before deep review begins.

By supporting natural-language interaction over indexed matter data, CaseBot helps users gain orientation in complex matters more quickly, improving how they prioritize review, plan strategy, and communicate early findings to stakeholders.

CaseBot is designed as an intelligence and efficiency layer—not a replacement for human legal judgment. All responses are directional in nature, with legal professionals retaining responsibility for validation, interpretation, and defensibility.

Taken together, these objectives define what CaseBot is designed to achieve; the following sections describe the specific capabilities that make those objectives practical in real-world legal workflows.

CaseBot®

Key Features

Smarter Case Intelligence Through Conversational GenAI

Building on the need for fast, defensible insight, CaseBot combines retrieval-augmented generation with legal domain–aware configuration to deliver explainable, matter-specific answers directly within Case Insight workflows.

Core Capabilities

Natural-Language Q&A

Users can ask focused, plain-language questions (for example, "Which custodians discussed Project Falcon in March 2024?") and receive concise, contextual responses grounded in matter data.

Source-Linked Answers

Each answer includes references back to specific documents and passages within Case Insight, supporting defensibility and enabling immediate, targeted follow-up review.

Embedded in Case Insight

CaseBot is accessed directly within the Case Insight interface, aligning with existing dashboards, searches, and matter workspaces. Users remain in a familiar environment while gaining GenAI-enhanced interaction.

Directional Intelligence, Not Determinative Findings

CaseBot is intended to guide issue spotting and early strategy. It is not a substitute for traditional document review, fact development, or attorney judgment, and it should not be relied upon to confirm the absence of information.

Workflow-Ready Use Cases

Early Matter Assessment and Triage

Rapidly identify key custodians, topics, and time periods for deeper review, enabling more focused and cost-effective discovery and investigation strategies.

Fact and Context Verification

Cross-check dates, participants, and issues across large datasets without manually combing through individual documents, supporting more efficient factual development.

Insight Summarization

Obtain high-level, narrative-style explanations supported by underlying evidence to assist with internal memoranda, deposition preparation, meet-and-confer planning, and early case strategy.

These features and use cases are enabled by a specific technical approach. The next section outlines how CaseBot works behind the scenes to deliver grounded, explainable answers.

How CaseBot Works

Retrieval-Augmented Generation Anchored in Evidence

To support defensible legal and investigative workflows, CaseBot uses a Retrieval-Augmented Generation (RAG) approach, ensuring that answers remain grounded in the underlying case materials rather than relying solely on a model's generalized training data.

Core Process

User Query
The user submits a natural-language question inside Case Insight (for example, "Who were the main attorneys communicating with outside counsel in 2023?").

Document Retrieval
CaseBot searches the Case Insight index and retrieves the most relevant text segments or "chunks" from documents, communications, and other indexed sources associated with the matter.

Answer Generation
A large language model synthesizes the retrieved segments into a concise, coherent answer that highlights key facts, relationships, and contextual details responsive to the query.

Evidence Linking and Validation
The response includes references back to the specific source documents and locations from which the information was drawn. Users can immediately verify the answer, review the surrounding context, and incorporate key materials into their work product.

This architecture enables CaseBot to provide fast, explainable answers while maintaining a clear evidentiary link between its outputs and the underlying electronically stored information (ESI).

Because this technical workflow sits at the heart of matter intelligence, HaystackID and eDiscovery AI subject CaseBot to rigorous testing and validation before and during production use, as described below.
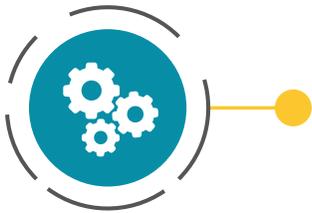
Testing and Validation

Production-Grade Assistant for Legal Workflows

To support use in sensitive legal, regulatory, and investigative matters, CaseBot underwent a structured program of testing and review consistent with HaystackID's standards for accuracy, reliability, and security.

Testing Program

Functional Testing
Automated and manual tests across diverse datasets confirmed stable, consistent behavior and robust handling of varied question types, document sets, and matter configurations.

Accuracy and Quality Review
Representative test questions were evaluated across multiple hypothetical matter scenarios to assess completeness, precision, and transparency of answers, including verification that referenced materials support the generated responses.

User Acceptance Testing (UAT)
Senior developers, project leads, and legal data experts evaluated usability, answer quality, and workflow alignment within Case Insight deployments. Feedback-informed refinements to prompts, guardrails, and user experience.

Security and Resilience Validation

Security Review and Penetration Testing
CaseBot's infrastructure, interfaces, and integrations were subjected to security review and penetration testing designed to identify and remediate vulnerabilities consistent with HaystackID's security practices.

Operational Monitoring
Ongoing performance and security monitoring supports early detection of anomalies and continuous improvement of CaseBot's reliability and user experience.

These measures help validate CaseBot as a production-ready AI assistant suitable for use under the rigorous security and compliance expectations that govern other HaystackID solutions.

In addition to testing and quality oversight, HaystackID places specific emphasis on security and risk management controls, ensuring that CaseBot aligns with existing organizational requirements and governance expectations.

Security and Risk Management
Aligned with HaystackID's Existing Security Posture

CaseBot is designed so that its introduction does not materially change the security posture or risk profile of Case Insight. It operates as a controlled service within the same secure ecosystem already trusted for Core Intelligence AI–enabled workflows.

Security Controls

Secure Infrastructure
All processing occurs within HaystackID's secure systems and its vetted technology and hosting providers, leveraging existing protections and controls.

Encryption in Transit and at Rest
Data is encrypted both in transit and at rest, helping protect confidential and sensitive information throughout processing and analysis.

Role-Based Access Control (RBAC)
Users can only query data they are already permitted to access within Case Insight. Existing permissions, ethical walls, and matter-based access restrictions remain in force.

Auditability and Oversight
Logging and monitoring support audit trails for access and use, enhancing transparency and supporting internal and external review where required.

Risk Management Considerations

Evidence-Linked Outputs
Because every response is anchored in specific underlying materials, CaseBot supports defensible workflows by enabling users to confirm and document the basis of its answers.

Index Retention and Governance
To support ongoing contextual Q&A, CaseBot relies on a maintained Case Insight index. Data is not deleted immediately after processing, and this should be clearly addressed in matter scoping, retention, and governance discussions.

Human Validation Requirement
CaseBot's outputs are designed as directional insights. Legal teams remain responsible for verifying findings, conducting appropriate follow-up review, and applying professional judgment. The assistant should not be relied upon to confirm the absence of information or to serve as final legal advice.

With these controls in place, organizations can confidently explore how CaseBot can be incorporated into their own matters and workflows. The following sections explain how to engage with HaystackID and provide additional context about the company.

Learn More Today.

To explore how CaseBot can enhance your use of Core Intelligence AI Case Insight—delivering conversational, defensible insight from day one—visit HaystackID.com or contact the HaystackID team to schedule a live demonstration or briefing.

CaseBot is available to qualified clients as part of HaystackID's integrated legal technology and services portfolio, supporting corporations and law firms in addressing complex, data-intensive matters.

Whether your focus is early matter assessment, internal investigation, regulatory response, or litigation readiness, HaystackID can help you understand how CaseBot fits into your broader information governance and discovery strategy.

About HaystackID®

HaystackID solves complex data challenges related to legal, compliance, regulatory, and cyber requirements. Core offerings include Global Advisory, Cybersecurity, Core Intelligence AI™, and ReviewRight® Global Managed Review, supported by its unified CoreFlex™ service interface. Recognised globally by industry leaders, including Chambers, Gartner, IDC, and Legaltech News, HaystackID helps corporations and legal practises manage data gravity, where information demands action, and workflow gravity, where critical requirements demand coordinated expertise, delivering innovative solutions with a continual focus on security, privacy, and integrity. Learn more at HaystackID.com.

Assisted by GAI and LLM technologies.