FACT SHEET

CaseBot™ for HaystackID® Core Intelligence AI™

AI Case Intelligence Built on the Record

HAYSTACK®

A New Way to Work With the Matter Record

CaseBot™ delivers agentic AI case intelligence that helps legal teams explore evidence, investigate complex questions, and perform substantive case work. In high-stakes legal and investigative matters, **understanding the record is only the beginning**. Teams need to develop facts, test theories, connect evidence, and turn what they find into usable case work.

CaseBot gives legal teams a new way to work with the matter record. With agentic investigation, CaseBot can work through questions in multiple steps identifying relevant evidence, pursuing additional lines of inquiry, evaluating what it finds, and **synthesizing the results into an evidence-backed response.**

Key Features

AGENTIC INTELLIGENCE ACROSS EVERY WORKFLOW

CaseBot uses an agentic process to help legal teams **explore the matter record, develop facts, and prepare their cases**. Whether a user asks a plain-language question or launches a Specialized Skill Agent, CaseBot can identify relevant evidence, pursue additional lines of inquiry, evaluate what it finds, and synthesize an evidence-backed response.

Users can direct this work through:

Natural-Language Exploration

Ask questions in plain language and let CaseBot investigate facts, events, people, claims, and relationships across the record. Examine supporting evidence and continue with follow-up questions as your understanding develops.

Eight Specialized Skill Agents

Launch purpose-built workflows that apply CaseBot's agentic process to recurring legal tasks: Fact Narrative, Chronology, Entity Map, Hot Document Finder, Deposition Kit, Claim Analysis, Request Analysis, and Record Check.

Both are grounded in the same searchable, persistent matter index and connect findings to supporting source material for validation and follow-up.

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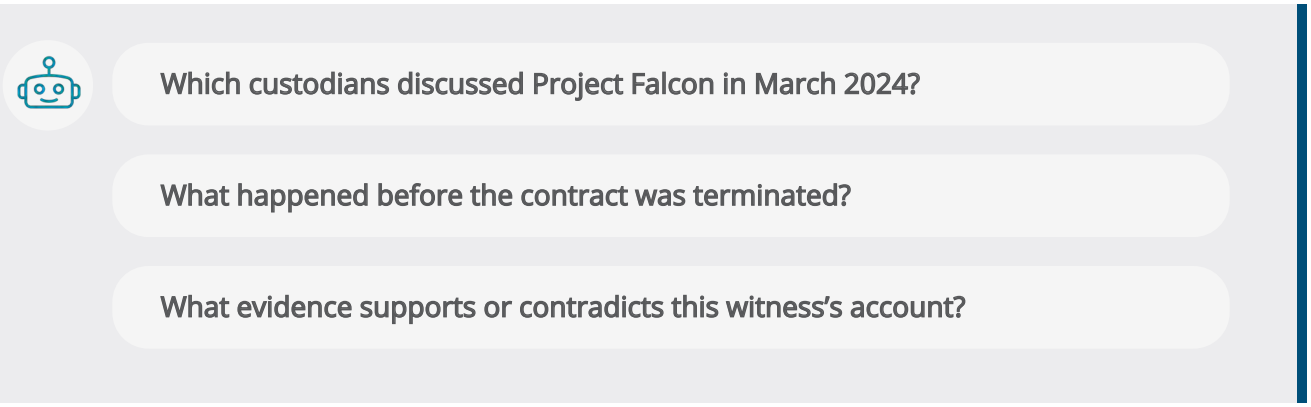
Core Capabilities

NATURAL-LANGUAGE Q&A

Ask focused questions in plain language and receive **contextual responses grounded in matter data.** Follow-up questions let users explore themes, clarify findings, and pursue new lines of inquiry as their understanding develops.



AGENTIC INVESTIGATION

For complex questions, CaseBot can work through multiple steps of analysis identifying relevant evidence, pursuing additional lines of inquiry, evaluating information across documents, and **synthesizing its findings into an evidence-backed response.**

SPECIALIZED SKILL AGENTS

Eight purpose-built Skill Agents apply defined analytical workflows to recurring legal tasks, helping teams perform substantive work without designing each process from scratch.

- **Fact Development:** Fact Narrative, Chronology, Entity Map, and Hot Document Finder.
- **Case Preparation:** Deposition Kit, Claim Analysis, Request Analysis, and Record Check.

Workflow-Ready Use Cases

1

Early Matter Assessment and Triage

Identify key custodians, topics, and time periods to focus discovery, prioritize review, and guide investigation strategy.

2

Fact and Context Verification

Cross-check dates, participants, communications, and assertions across the record to support factual development and identify evidence requiring further examination.

3

Case Preparation and Work Product

Develop source-supported narratives, chronologies, and analyses to support internal memoranda, deposition preparation, discovery planning, and case strategy.

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How CaseBot Works

FROM THE MATTER RECORD TO EVIDENCE-BACKED ANALYSIS

CaseBot combines evidence retrieval with AI analysis to support natural-language exploration, agentic investigation, and Specialized Skill Agents. Its responses draw on the indexed matter record, **giving legal teams a path from a question or task to supporting evidence.**

INDEX FOUNDATION

A Searchable Matter Index

CaseBot creates a searchable index of the document population selected for the project, which can include all documents, relevant documents, or another targeted subset.

EVIDENCE DISCOVERY

Retrieve Relevant Evidence

When a user asks a question or launches a workflow, CaseBot searches the indexed record for relevant information from documents, communications, and other included material.

INVESTIGATIVE REASONING

Analyze and Investigate

CaseBot may answer directly or work through additional investigative steps, including comparing evidence, evaluating supporting and contrary information, and synthesizing findings.

EVIDENTIARY TRACE

Connect Findings to Sources

CaseBot connects output to supporting documents and passages so users can examine the evidence, review context, and validate findings.

LIFECYCLE GOVERNANCE

Persistent by Design

The CaseBot index persists for the life of the project and is deleted when the project closes, when the matter closes in Relativity, or upon request, whichever occurs first.

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Specialized Skill Agents

The Skill Agents fall into two categories: **Fact Development**, which helps attorneys understand the record, and **Case Preparation**, which turns that understanding into usable litigation work product.

FACT DEVELOPMENT: UNDERSTAND THE RECORD

Fact Narrative

Builds a detailed, evidence-backed account of what happened across targeted matter documents.

Chronology

Reconstructs key events and organizes them into a source-supported timeline.

Entity Map

Identifies important people, organizations, relationships, and interactions across the record.

Hot Document Finder

Surfaces documents with potentially significant factual, strategic, or evidentiary value.

CASE PREPARATION: ACT ON THE RECORD

Deposition Kit

Develops witness-focused preparation materials grounded in the documentary record.

Claim Analysis

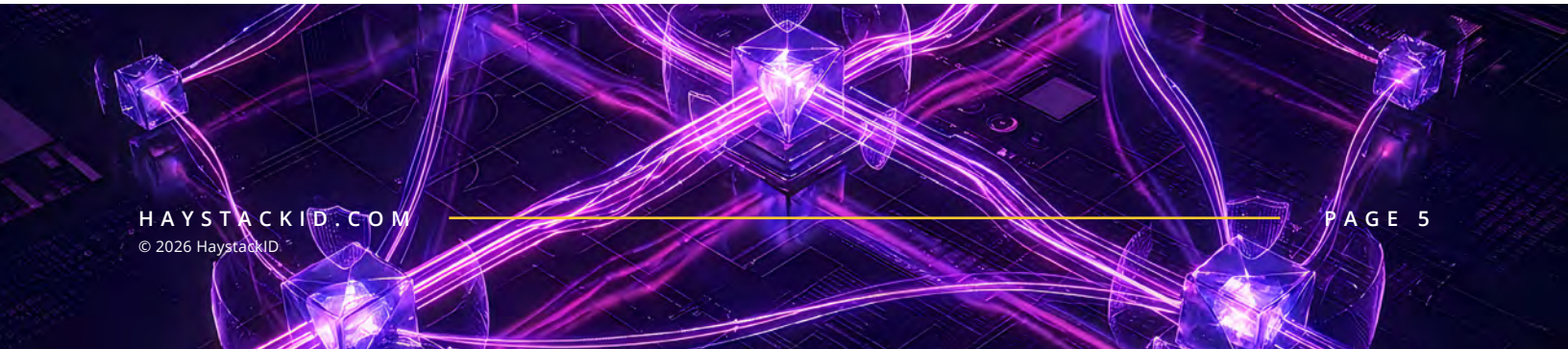
Evaluates claims, allegations, or case theories against supporting and contrary evidence.

Request Analysis

Breaks discovery requests into component issues and analyzes the record against each request.

Record Check

Tests testimony, statements, or assertions against the documentary record and identifies supporting, contradictory, or missing evidence.



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Data Privacy and Security

CaseBot is built with **privacy, security, and control at the core.** Your data remains yours, protected by enterprise-grade safeguards and governed by policies designed for legal, regulatory, and corporate requirements.

- **No Training on Client Data:** Documents, prompts, and responses are never used to train, fine-tune, or otherwise modify any language model. HaystackID does not modify or manage the models it uses.
- **No Third-Party Sharing:** Client data is not sent to third parties. CaseBot operates within a secure Azure environment, with client processing and storage segregated by container.
- **No Content Moderation:** The environment is exempt from automated content filtering and moderation, allowing privileged, confidential, and sensitive legal material to be analyzed without interference.
- **Encryption and Isolation:** CaseBot data is encrypted and maintained within a segregated environment designed to prevent cross-client data exposure.
- **CaseBot Index Retention:** The index is retained for the life of the CaseBot project and is deleted when the project closes, when the matter closes in Relativity, or upon request, whichever occurs first.

Evidence and Human Oversight

CaseBot connects findings to supporting source material so legal teams can examine the evidence and validate the analysis. Legal professionals remain responsible for **verifying findings, conducting appropriate follow-up review, and applying professional judgment.** CaseBot should not be relied upon to confirm the absence of information or to provide final legal advice.

LEARN MORE TODAY

Explore how CaseBot can strengthen case intelligence with **agentic investigation, evidence-backed analysis, and source-linked findings**. Visit HaystackID.com or contact the HaystackID team to schedule a live demonstration or briefing.

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 and eDiscovery AI® technology. Recognized globally by industry leaders, including Chambers, Gartner, IDC, and Legaltech News, HaystackID helps corporations and legal practices 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.

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