



**What's new**

# ZyLAB ONE 7.0

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#### **Disclaimer**

ZyLAB assumes no responsibility or liability and makes no guarantees, either explicit or implicit, with respect to the information presented in this manual and/or for any errors, incompatibility issues, inoperability or inaccuracies that may appear in this software.

The contents of this manual is subject to change in the future without notice. We made every effort to ensure the accuracy of the contents of this manual.

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# ZyLAB ONE 7.0 - What's New

In this ZyLAB ONE 7.0 - What's New guide, we shortly describe the new features that have been added since version 6.0 (on premise). For a more detailed description, please refer to the ZyLAB ONE 7.0 Manual.

All information in this guide (and more) can be found on the Documentation Portal:  
<https://docs.zylab.com>

Please note that the information on the Documentation Portal is continuously updated and might not reflect the ZyLAB ONE 7.0 On Premise release.

# General

## Text View Tab

The screenshot shows the ZYLAB platform interface for document ABC2151.pdf. The main content area displays extracted plain text. A red box highlights the right side of the content area, which contains a 'Copy All Text' button. The left sidebar shows document properties and a document family. The right sidebar includes a 'Document Info' section with various tabs like Tagging, Redactions & Annotations, and Insights.

In Document View, the Text View tab shows the full extracted, plain text. Access to document text is required; users must be assigned the Access document text permission.

In Document view, select the **Text View** tab. Choose one of the following:

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For more information, please refer to <https://docs.zylab.com>

- Select **Copy All Text** to copy all extracted text to clipboard. Paste the copied text into another environment.

The screenshot shows the ZyLAB ONE 7.0 interface for document ABC2151.pdf. The 'Text View' tab is highlighted with a red box. On the right side of the interface, there is a large area of extracted text. A red arrow points to the 'Copy All Text' button located in the top right corner of this text area. The text itself includes sections like '(5) military necessity; and', '(6) such other factors as the Secretary, in consultation with the Attorney General, may consider appropriate.', and '(c) REPORT BY SECRETARY OF DEFENSE.—Not later than January 21, 2000, the Secretary of Defense shall submit to Congress a report on the actions taken under subsection (b) and any other actions taken by the Secretary to provide the maximum possible protections for confidentiality described in that subsection.' Below this, there is a section titled 'HEALTH CARE QUALITY INFORMATION AND TECHNOLOGY ENHANCEMENT' followed by several paragraphs of legal text.

- Select a segment of the extracted text and use the shortcut keys (Ctrl C + Ctrl V) to copy and paste the selected text into another environment.

# View Document Audit Event

The screenshot shows the ZYLAB Audit Log interface. On the left, there's a sidebar with icons for Home, Audit Log, and Help. The main area has a title 'Audit Log' with a question mark icon. Below it is a table with columns: Event Type, Time Stamp, User, and Search. The 'Event Type' column is highlighted with a red box around the first entry, which is 'View Document'. The table contains several rows of audit log entries.

Event Type	Time Stamp	User	Search
View Document	Nov 25, 2022, 3:53:46 F	[Redacted]	[Redacted]
Search	Nov 25, 2022, 3:53:37 F	[Redacted]	[Redacted]
Search	Nov 25, 2022, 3:53:32 F	[Redacted]	[Redacted]
View Document	Nov 25, 2022, 3:52:34 F	[Redacted]	[Redacted]
View Document	Nov 25, 2022, 3:50:09 F	[Redacted]	[Redacted]

See who viewed which document, when. The event type View Document is logged in the Audit Log.

This screenshot shows a more detailed view of the ZYLAB Audit Log interface. On the left, there's a sidebar with filters for Event Type (selected 'View Document'), User (selected 'All Users'), Time Frame (Oct 25, 2022 - Nov 25, 2022), and Scope (Specify Document ID). The main area shows a list of audit events. One event is selected, highlighted with a yellow background and a red box around its 'Event Type' field ('View Document'). To the right, a 'Event Details' pane is open, displaying specific details for the selected event. An arrow points to the 'View Type:' field, which is set to 'Image'.

Event Type	Time Stamp	User	Search
View Document	Nov 25, 2022, 3:53:46 F	[Redacted]	[Redacted]
Search	Nov 25, 2022, 3:53:37 F	[Redacted]	[Redacted]
Search	Nov 25, 2022, 3:53:32 F	[Redacted]	[Redacted]
View Document	Nov 25, 2022, 3:52:34 F	[Redacted]	[Redacted]
View Document	Nov 25, 2022, 3:50:09 F	[Redacted]	[Redacted]

**Event Details**

Event Type: View Document  
Time Stamp: Nov 25, 2022, 3:53:46 PM  
User: [Redacted]  
User IP Address: [Redacted]

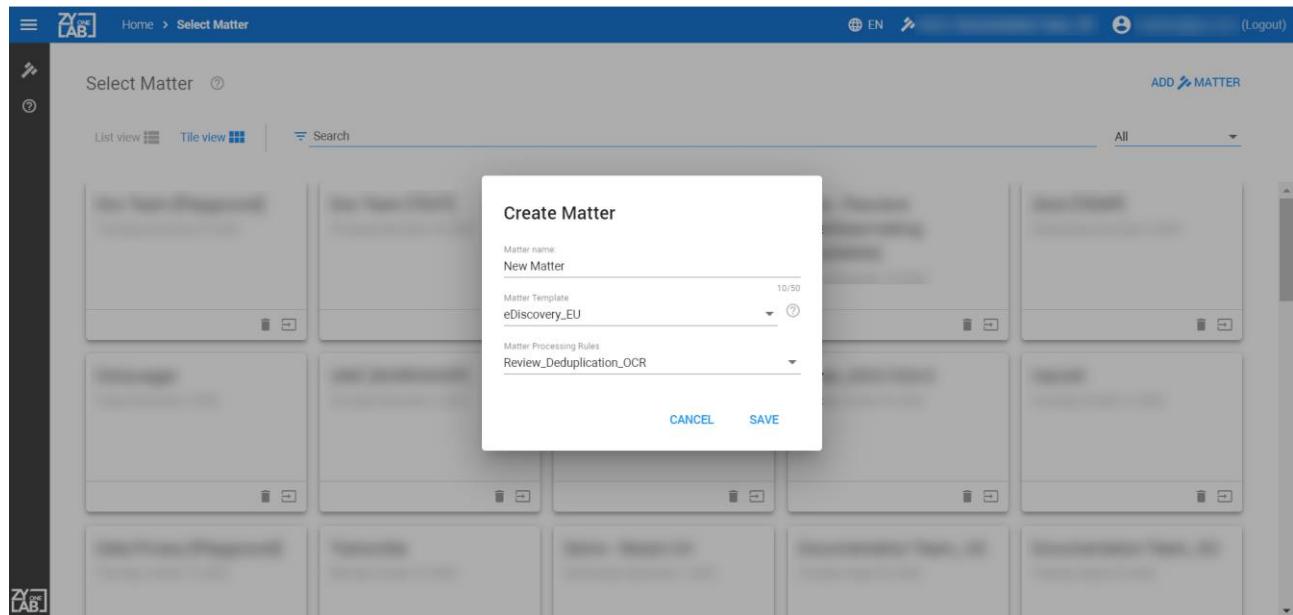
**Parameters**

Document Id: [Redacted]  
View Type: Image

The View Type – Image, Text, Production, or Multimedia – is displayed in the Events Details pane.

# Matter Creation and Deletion

## Create Matter



New Matter Templates and Matter Processing Rules are available in Matter creation.

- From the Select Matter page, click **ADD MATTER**

The Create Matter screen appears.

**Create Matter**

Matter name:  
New Matter 10/50

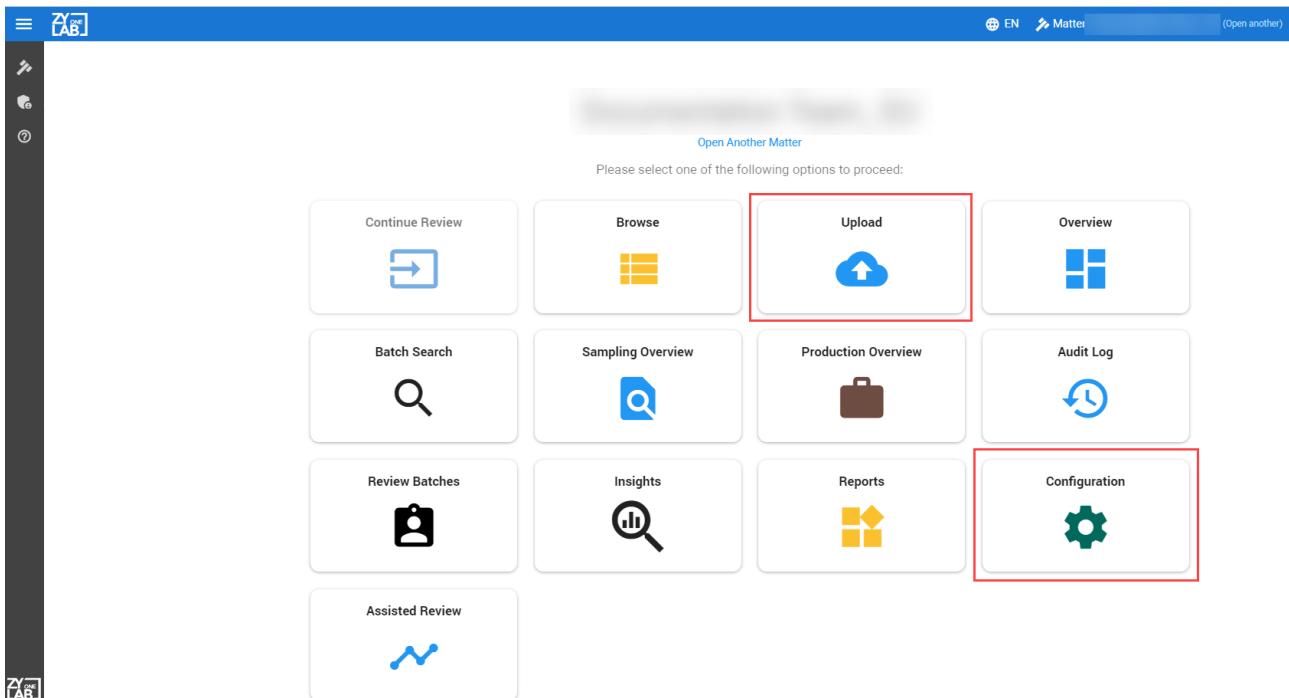
Matter Template  
eDiscovery\_EU ?

Matter Processing Rules  
Review\_Deduplication\_OCR

**CANCEL**      **SAVE**

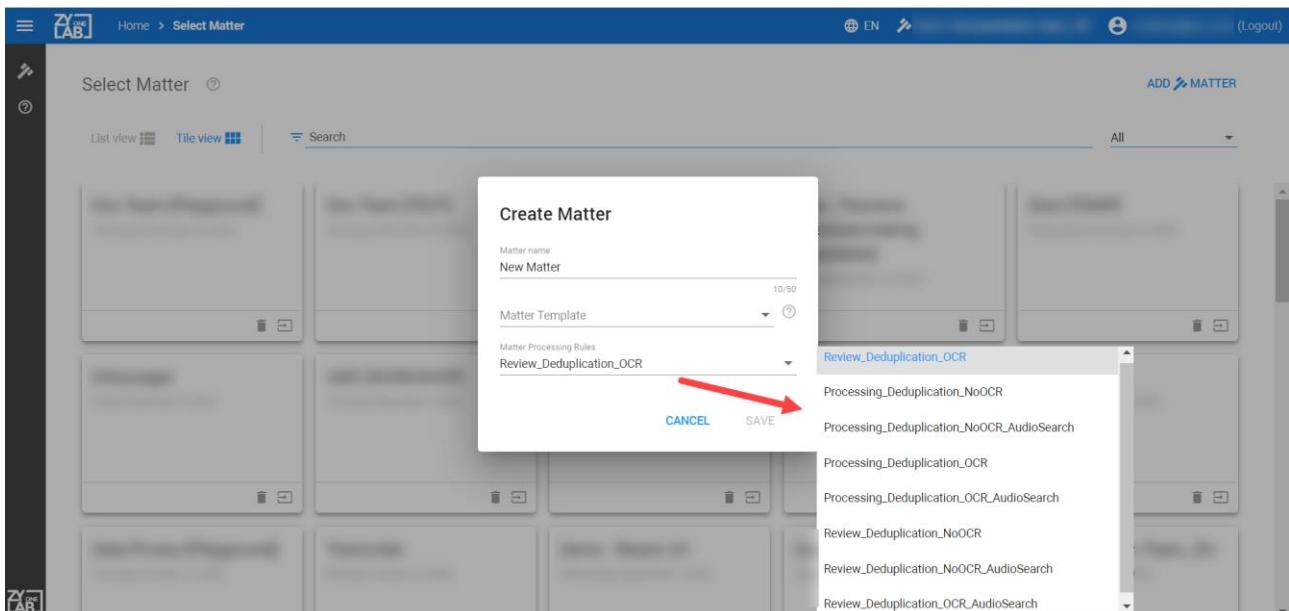
- Define the **Matter Name**.
  - Select the **Matter Template**.
    - eDiscovery\_EU
    - eDiscovery\_US
    - FOIA\_US
    - Wob
    - Woo\_Actief
    - Woo\_Passief
    - Platform\_Information\_Management
    - ZyLAB\_ONE\_Information\_Management
  - Select the **Matter Processing Rules**.
    - Processing\_Deduplication\_NoOCR
    - Processing\_Deduplication\_NoOCR\_AudioSearch
    - Processing\_Deduplication\_OCR
    - Processing\_Deduplication\_OCR\_AudioSearch
    - Review\_Deduplication\_NoOCR
    - Review\_Deduplication\_NoOCR\_AudioSearch
    - Review\_Deduplication\_OCR
    - Review\_Deduplication\_OCR\_AudioSearch
  - Click **Save**.
- Open the newly created matter from the Select Matter screen.

## Matter Creator is Matter Administrator



By default, the Matter creator is now the Matter administrator. Matter creators can perform all actions requiring Administration rights. This includes, but is not limited to, uploading data and managing security.

## Create Matter Processing Rules

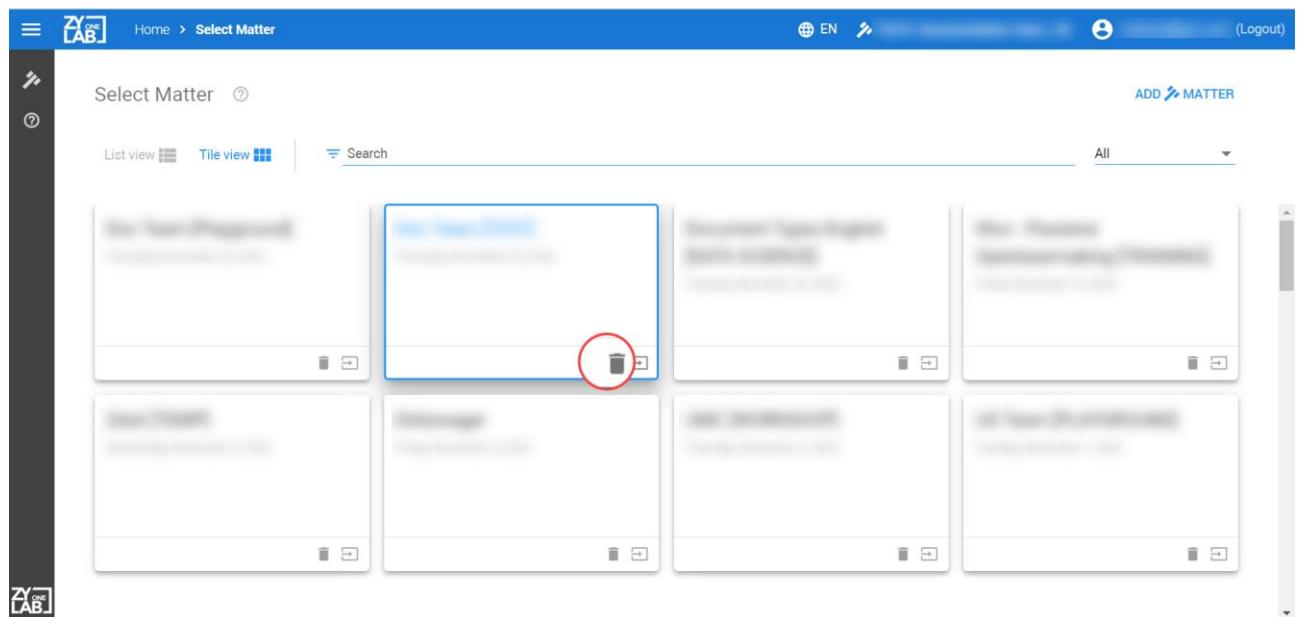


Matter Processing Rules are renamed.

In Create Matter, choose from the following **Matter Processing Rules**:

- Processing\_Deduplication\_NoOCR
- Processing\_Deduplication\_NoOCR\_AudioSearch
- Processing\_Deduplication\_OCR
- Processing\_Deduplication\_OCR\_AudioSearch
- Review\_Deduplication\_NoOCR
- Review\_Deduplication\_NoOCR\_AudioSearch
- Review\_Deduplication\_OCR
- Review\_Deduplication\_OCR\_AudioSearch

## Delete Matter



Delete a matter from the Select Matter screen. Click the delete icon  at the bottom of the Matter card.

# Search

## Document Preview

The screenshot shows the ZyLAB ONE 7.0 interface. At the top, there is a navigation bar with the ZyLAB logo, a search bar, and links for Home, All Documents, EN, (Open another), and (Logout). Below the navigation bar is a toolbar with icons for Search, Timeline, View as (Facets or Document list), Sort by (Default), and other settings.

The main area displays a list of documents. A red arrow points to the thumbnail preview of a PDF file named "ABC2151.pdf". The preview shows the first page of the document. Below the preview, the file name "ABC2151.pdf" and the text "Number of Hits: 0" are visible.

At the bottom right, there are page size and navigation controls: "Page Size: 50" and "1 of 170".

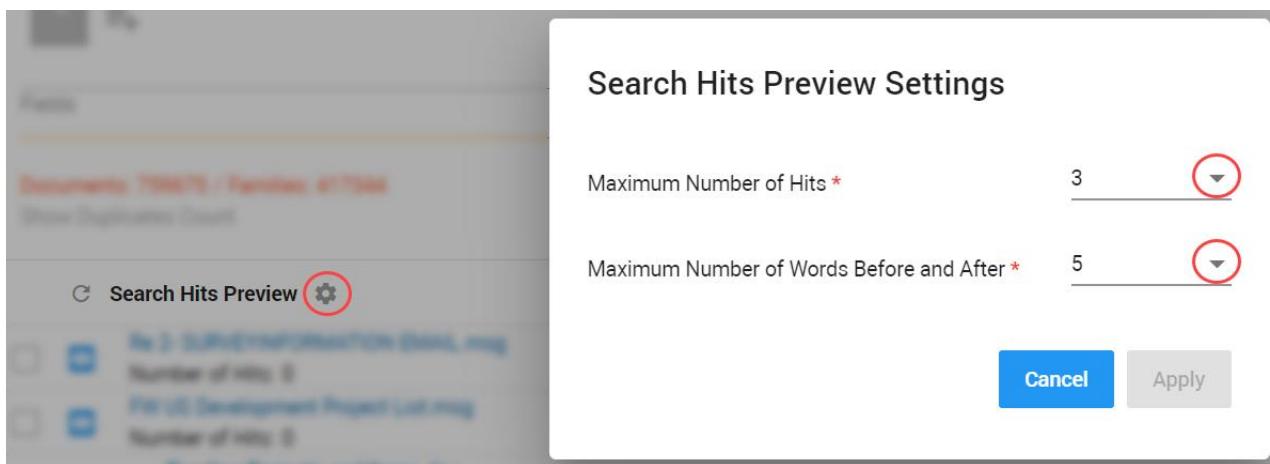
Quickly preview the first page of a document by hovering your cursor over the document icon.  
Access to document content is required for preview; users must be assigned the Access document content permission.

# Search Hits Preview

The screenshot shows the ZYLAB search interface with a search query for 'Finance'. The results page displays a preview of search hits. A specific hit for 'The seller and the owner.msg' is highlighted with a red box and a red arrow pointing to it. The preview shows the file type (.msg), the number of hits (2), the search relevancy ranking (0.05), and a snippet of the document content: "... of the goods to a **Finance** Company, usually at a discounted... make the seller and the **finance** house jointly and severally liable...". Other hits listed include 'RE Option pricing approaches.msg' and 'Communications data.xls'.

Use Search Hits Preview to view the context of a search hit and determine the relevancy of a file without opening it. Access to document text is required for Search Hits Preview; users must be assigned the Access document text permission.

- Click the **Settings** icon to specify Search Hit Preview preferences. Adjust the **Maximum Number of Hits** to limit the hits shown for each file preview. Adjust the **Maximum Number of Words Before and After** to limit the words shown surrounding the hit.



- Click the **Search Hits Preview** icon to view the search hits.



# Tagging

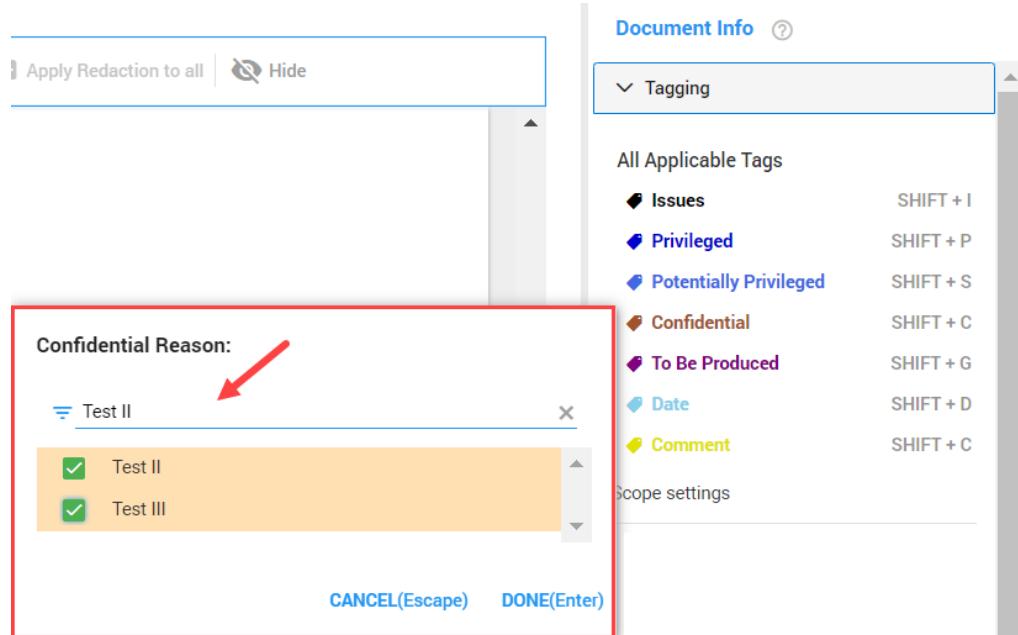
## Filter and Create Tag Values

The screenshot shows the ZyLAB ONE 7.0 interface in Document View. On the left, there are view options: Image View (selected), Text View, and Produced View. The main area displays a document with contact information for David Noble. A red box highlights the 'Tagging' section in the 'Document Info' sidebar. This sidebar also lists 'All Applicable Tags' with their corresponding keyboard shortcuts: Issues (SHIFT + I), Privileged (SHIFT + P), Potentially Privileged (SHIFT + S), Confidential (SHIFT + C), To Be Produced (SHIFT + G), Date (SHIFT + D), and Comment (SHIFT + C). Below these are 'Scope settings' and 'Documents in scope: 1'. The 'Email Conversation' section shows 'None' selected. The 'Tagging' section contains a search bar with the placeholder 'Type to filter or create a new value', a list of values ('Test', 'Test II', 'Test III'), and buttons for 'CANCEL(Escape)' and 'DONE(Enter)'. A red arrow points from the text 'Use the Filter grid to search the values associated with a tag and select value(s) to apply to the tag, or create a new value to add to the tag.' to the search bar.

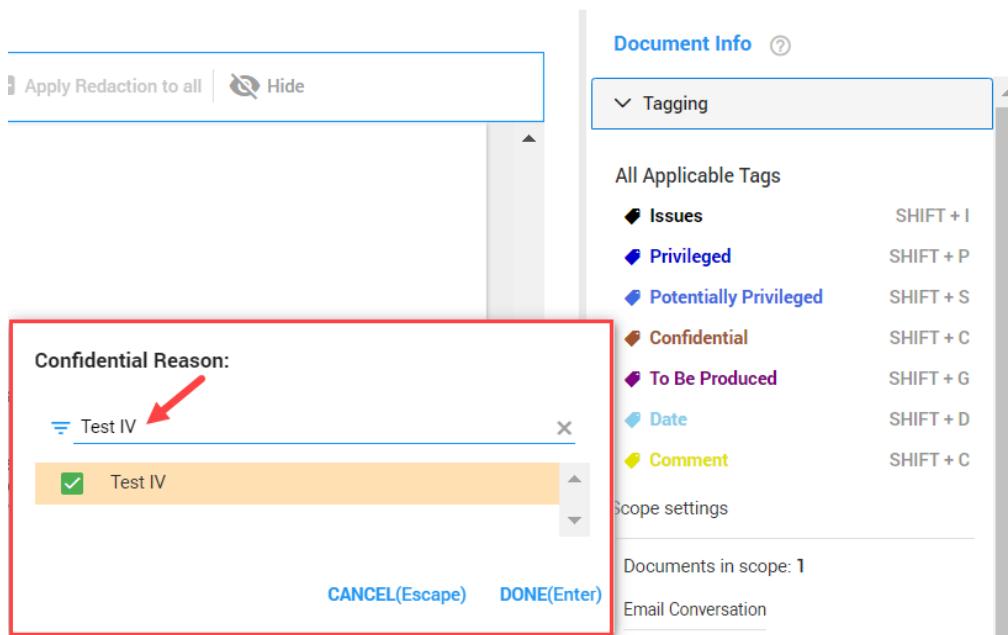
Specify and select tag values. Use the Filter grid to search the values associated with a tag and select value(s) to apply to the tag, or create a new value to add to the tag.

In Document View, expand **Tagging**. When performing tagging and specifying the tag value(s), use the Filter grid. Choose one of the following:

- Search existing values. Enter the relevant value and select it. Repeat this to select multiple values. To apply the selected value(s) to the tag, click **DONE(Enter)** or press Enter.



- Create a new value. Enter the new value and select it. To add the value to the tag, click **DONE(Enter)** or press Enter.



# Redactions and Annotations

## Redact Search Hits

The screenshot shows the ZyLAB ONE 7.0 interface for managing search results. The main view displays a single search hit for an email titled "Marketing investment". The "Image View" tab is active. In the top right of the main area, there is a toolbar with several icons, one of which is highlighted with a red box and labeled "Apply Reduction to all". The email content itself contains standard header information (Cc, From, Sent, Subject, Received) and a body text about marketing investments. To the right of the main content area, there is a sidebar titled "Document Info" which lists various document metadata categories such as Tagging, Redactions & Annotations, Reviewer Remarks, Near-Duplicates, Actions, Productions, Insights, and Audit.

Apply a redaction to a single Search Hit or redact all Search Hits at once.

Perform a search and open a search hit. In Document View, choose one of the following:

- To redact a single hit, select the **Apply Reduction** icon or **Apply Reduction**
- To redact all search hits, select the **Apply Reduction to all** icon or **Apply Reduction to all**

# Manage Redactions & Annotations

The screenshot shows the ZYLAB interface for managing document annotations. On the left, there's a sidebar with navigation links like 'Home', 'All Documents', and 'ABC2151.pdf'. The main area displays a PDF document titled 'TITLE 10-ARMED FORCES' with page 80. A red arrow points to the 'Redactions & Annotations' section in the 'Document Info' panel, which includes buttons for 'Finish Redact (Q)' and 'Annotate (A)'. Below these buttons are 'Select All' and 'Select None' checkboxes, followed by edit, delete, and search icons. The 'Page: 1 (2 redactions)' section shows two redacted areas with these icons.

Edit or delete multiple redactions and annotations at once.

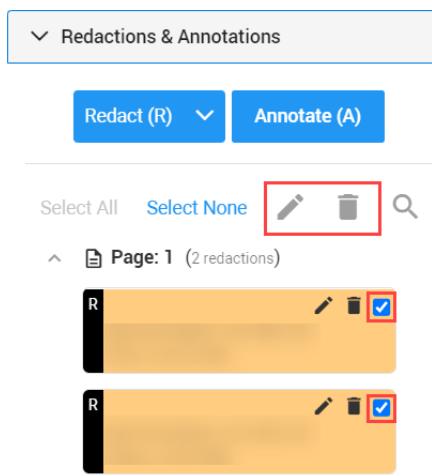
In Document View, expand **Redactions & Annotations**.

- Select the relevant redactions or annotations.

This screenshot shows the 'Redactions & Annotations' interface within the document view. It features a header with 'Redact (R)' and 'Annotate (A)' buttons. Below is a toolbar with 'Select All', 'Select None', and edit/delete/search icons. The main area shows 'Page: 1 (2 redactions)' with two redacted sections, each with its own set of edit, delete, and checkmark icons. A red box highlights the checkmark icon in the top right of the second redacted area.

- In Show Options, edit or delete the selection.

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# Withhold Redacted Pages

The screenshot shows the ZYLAB Production Wizard interface. The top navigation bar includes 'Home', 'All Documents', 'Create Production', 'EN', '(Open another)', and '(Logout)'. Below the navigation is a horizontal step bar with six steps: 'Define Production', 'Image Settings' (which is active), 'Native Settings', 'Text Settings', 'Load File', and 'Production Summary'. The main content area has tabs for 'PRODUCE', 'BURN-IN FIELDS', 'REDACtIONS' (selected), and 'PLACEHOLDERS'. Under 'REDACtIONS', there is a section for 'Include Reduction Exemptions Enabled' and 'Select Position of the Reduction Exemption In Left Margin'. A red box highlights the 'Withhold Fully Redacted Pages Enabled' section, which is also checked. Below it are options for 'Keep Original Bates Numbers for Withheld Pages' (disabled) and 'Select when to use Placeholders Use Placeholder for fully redacted Documents only'. At the bottom, it says 'Custom Placeholder Text Pages are withheld' and 'Press Ctrl+Space to see list of fields'. To the right, a preview window shows two pages with large black redacted areas labeled 'REDACTED'.

Withhold fully redacted pages from production to enhance the visibility of relevant information.

- In the Production Wizard, open **Image Settings**.
- Select the **Redactions** tab.
- Enable **Withhold Fully Redacted Pages**.

## Select Multiple Redaction Codes

The screenshot shows the ZYLAB Document View interface. The left sidebar includes 'Conversation (0)', 'Document Family (2)' (with 'R RE: Australia' and 'ABC2151.pdf'), 'Properties', and 'Filter'. The main content area shows a PDF document titled 'ABC2151.pdf' with the status 'NOT REVIEWED'. The document page contains text about Title 10—ARMED FORCES and health care quality improvement and technology. On the right, a 'Redaction' dialog box is open, showing a list of 'Standard Redaction Code' options. 'Attorney Client' and 'Confidential' are selected and highlighted in blue. Other options like 'PHI', 'PII', and 'Proprietary' are also listed but not selected. The dialog also includes 'Redaction Text' and 'Reviewer Remarks' sections.

Select one or more Standard Redaction Code(s) when adding a redaction.

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- Double-click on the redaction applied.
- From the **Code Entry** drop-down, select one or more **Standard Redaction Code(s)**.

HEALTH CARE QUALITY INFORMATION AND TECHNOLOGY ENHANCEMENT

Pub. L. 106-65, div. A, title VII, §723, Oct. 5, 1999, 113 Stat. 695, as amended by Pub. L. 106-398, §1 (div. A, title VII, §753(a)), Oct. 30, 2000, 114 Stat. 1654, 1654A-195; Pub. L. 109-163, div. A, title VII, §742, Jan. 6, 2006, 119 Stat. 3360; Pub. L. 109-361, div. A, title X, §209, Oct. 17, 2006, 120 Stat. 2394, provided that:

"(a) PURPOSE.—The purpose of this section is to ensure that the Department of Defense addresses issues of medical quality surveillance and implements solutions for those issues in a timely manner that is consistent with national policy and industry standards.

"(b) DEPARTMENT OF DEFENSE PROGRAM FOR MEDICAL INFORMATICS AND DATA.—The Secretary of Defense shall establish a Department of Defense program, the purposes of which shall be the following:

- "(1) To develop parameters for assessing the quality of health care information.
- "(2) To develop the defense digital patient record.
- "(3) To develop a repository for data on quality of health care.
- "(4) To develop capability for conducting research on quality of health care.
- "(5) To conduct research on matters of quality of health care.
- "(6) To develop decision support tools for health care providers.
- "(7) To issue medical performance report cards.
- "(8) To conduct educational programs on medical informatics to meet identified needs.

"(c) AUTOMATION AND CAPTURE OF CLINICAL DATA.—(1) Through the program established under subsection (b), the Secretary of Defense shall accelerate the efforts of the Department of Defense to automate, capture, and exchange controlled clinical data and present providers with clinical guidance using a personal information exchange clinical lexicon or digital patient record.

quality of care provided to beneficiaries.  
"(B) The coordination of key components of medi-

Redaction Text

Please select a Code Entry ▼

Motivation

Appearance Settings

Save these settings as default

CANCEL    DONE

HEALTH CARE QUALITY INFORMATION AND TECHNOLOGY ENHANCEMENT

Pub. L. 106-65, div. A, title VII, §723, Oct. 5, 1999, 113 Stat. 695, as amended by Pub. L. 106-398, §1 (div. A, title VII, §753(a)), Oct. 30, 2000, 114 Stat. 1654, 1654A-195; Pub. L. 109-163, div. A, title VII, §742, Jan. 6, 2006, 119 Stat. 3360; Pub. L. 109-361, div. A, title X, §209, Oct. 17, 2006, 120 Stat. 2394, provided that:

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- "(4) To develop capability for conducting research on quality of health care.
- "(5) To conduct research on matters of quality of health care.
- "(6) To develop decision support tools for health care providers.
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quality of care provided to beneficiaries.  
"(B) The coordination of key components of medi-

Redaction Text

Please select a Code Entry ▼

Standard Redaction Code

Attorney Client  
 Attorney Work Product  
 Confidential  
 PHI  
 PII  
 Proprietary

# Filter Redactions & Annotations

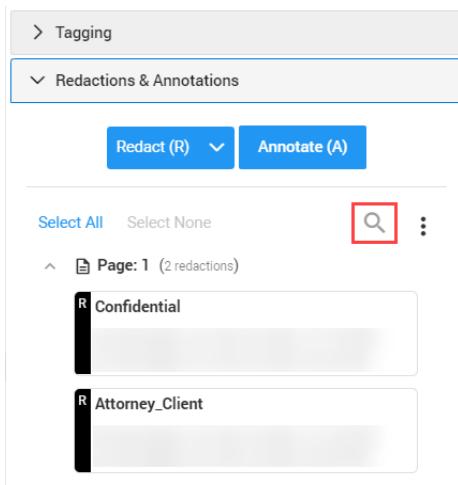
The screenshot shows a document management interface. On the left, there's a sidebar with navigation links like 'Conversation (0)', 'Document Family (2)', and 'Properties'. The main content area displays a document page with a large black redaction box. To the right of the document, a sidebar titled 'Document Info' has a section 'Redactions & Annotations' highlighted with a red border. This section contains a search bar and a list of annotations. One annotation is visible: 'Attorney\_Client' on page 1. The interface includes standard navigation buttons like 'Home', 'Logout', and 'Image View'.

Filter the redactions and annotations applied to a document to quickly locate the ones you need.

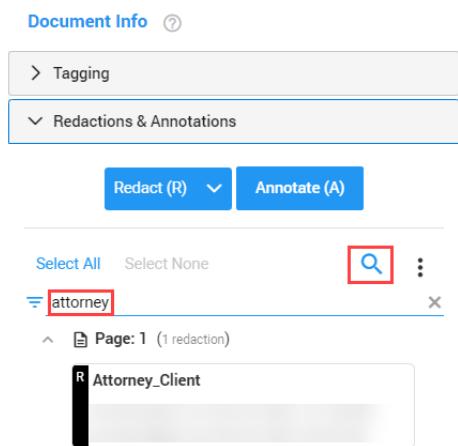
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For more information, please refer to <https://docs.zylab.com>

- In Document View, expand **Redactions & Annotations**.

- Select the **Search icon** 



- Enter your search in the filter field.



# Configuration

## Access Document Text Permission

The screenshot shows the ZYLAB Role Management interface. On the left, there's a sidebar with a 'Current Matter ("Doc Team [TEST]")' dropdown, a 'Filter' button, and a 'Roles' section containing a 'Matter Admin' role which is highlighted with an orange background. The main area has tabs for 'OVERVIEW' and 'ROLE PERMISSIONS'. Under 'ROLE PERMISSIONS', there are three columns: 'Review', 'Configuration', and 'Production'. In the 'Review' column, the 'Access document text' checkbox is checked and highlighted with a red border. A red arrow points from the text above to this specific checkbox. At the bottom right of the permissions table are 'CANCEL' and 'APPLY' buttons.

Assign the **Access document text** permission to enable Search Hits Preview and Text View.

- Open Configuration. Select **Role Management**.
- In Roles, select a role.
- In the Role Permissions tab, check **Access document text** and click **Apply**.

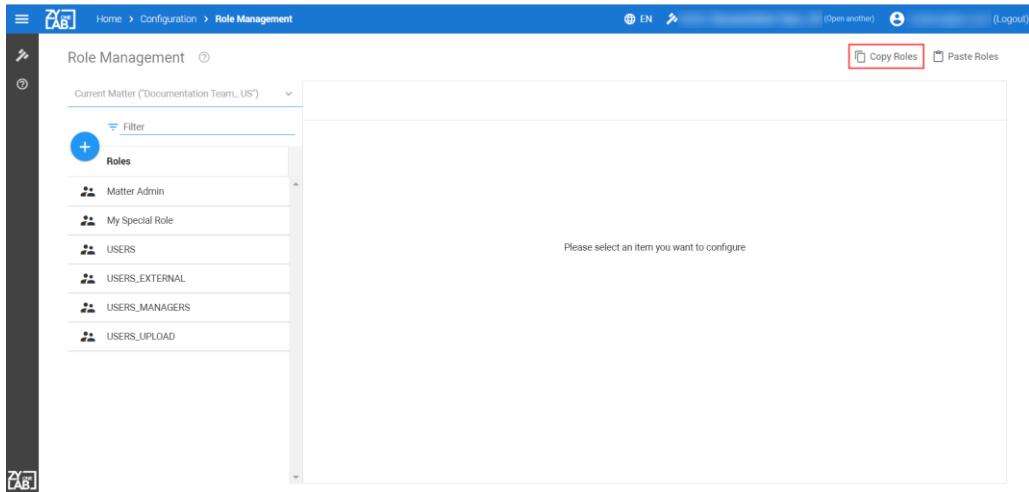
## Copy/Paste Matter Roles

The screenshot shows the ZyLAB ONE 7.0 Role Management interface. On the left, there is a sidebar with a 'Roles' section containing several role entries: 'Matter Admin' (selected and highlighted in orange), 'My Special Role', 'USERS', 'USERS\_EXTERNAL', 'USERS\_MANAGERS', and 'USERS\_UPLOAD'. Above the sidebar, the breadcrumb navigation shows 'Home > Configuration > Role Management'. At the top right, there are links for 'EN', 'Open another', 'Logout', and a user icon. A red box highlights the 'Copy Roles' button in the top right corner of the main content area. The main content area displays a 'Matter Admin' role entry with a 'Copy Role' button. Below this, the 'OVERVIEW' and 'ROLE PERMISSIONS' sections are shown, each listing various permissions. At the bottom right of the main content area are 'CANCEL' and 'APPLY' buttons.

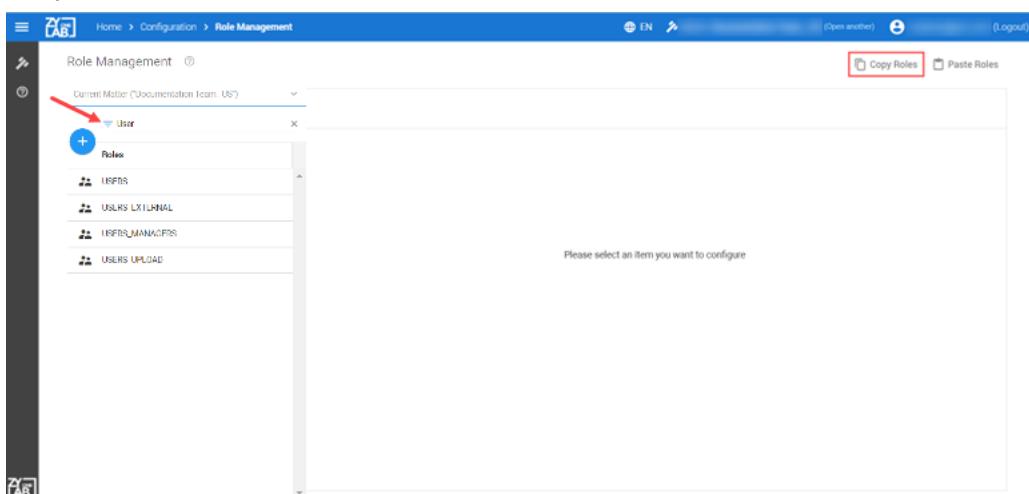
Copy the configuration of one or more roles into additional matters.

First, open **Configuration** and select **Role Management**. Choose one of the following:

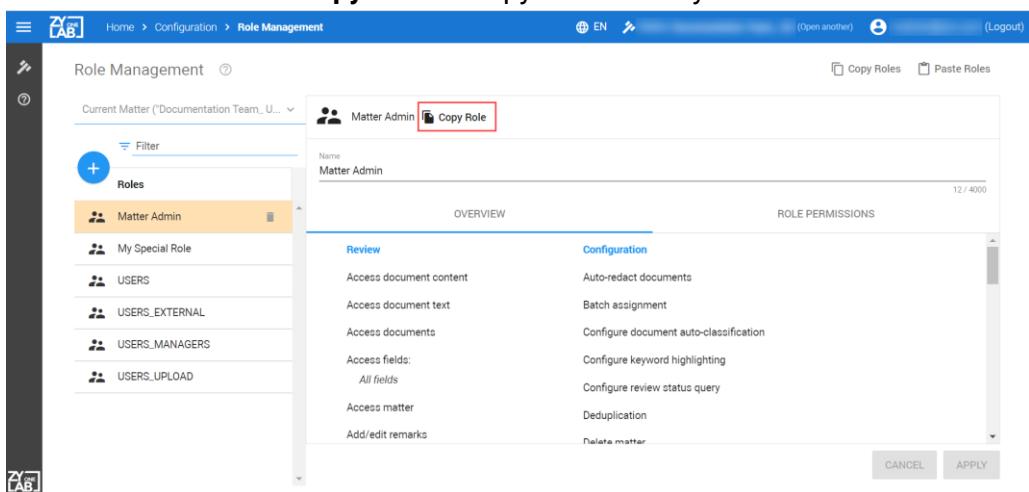
- From the overview page, click **Copy Roles** to copy all roles.



- Use the Filter function to search for and include only specific Role(s). Click **Copy Roles** to copy this filtered selection of roles.



- Select a role and click **Copy Role** to copy this role only.



Next, open the matter in which you would like to paste the copied role configurations.

- Open the target matter. Open **Configuration** and select **Role Management**.
- Click **Paste Role(s)** to add the copied role(s). Duplicate roles are not allowed; roles that already exists, will be ignored. If the role is assigned specific properties that do not exist in the target matter, then the copied role will be pasted without these permissions.