

Quick Reference Guide

ZyLAB ONE - SaaS



1 LOG IN

1. Open the invitation email you received to join ZyLAB ONE.
2. Follow the instructions to register and/or log in.
3. ZyLAB ONE will open on the **Select Matter** page.
4. Select the matter you are going to work on.
5. Save the ZyLAB ONE website as a favorite.
Next time, go to your favorites to log in.

Note: You might not have access to all features.
This depends on the role that has been assigned to you.



someone@example.com

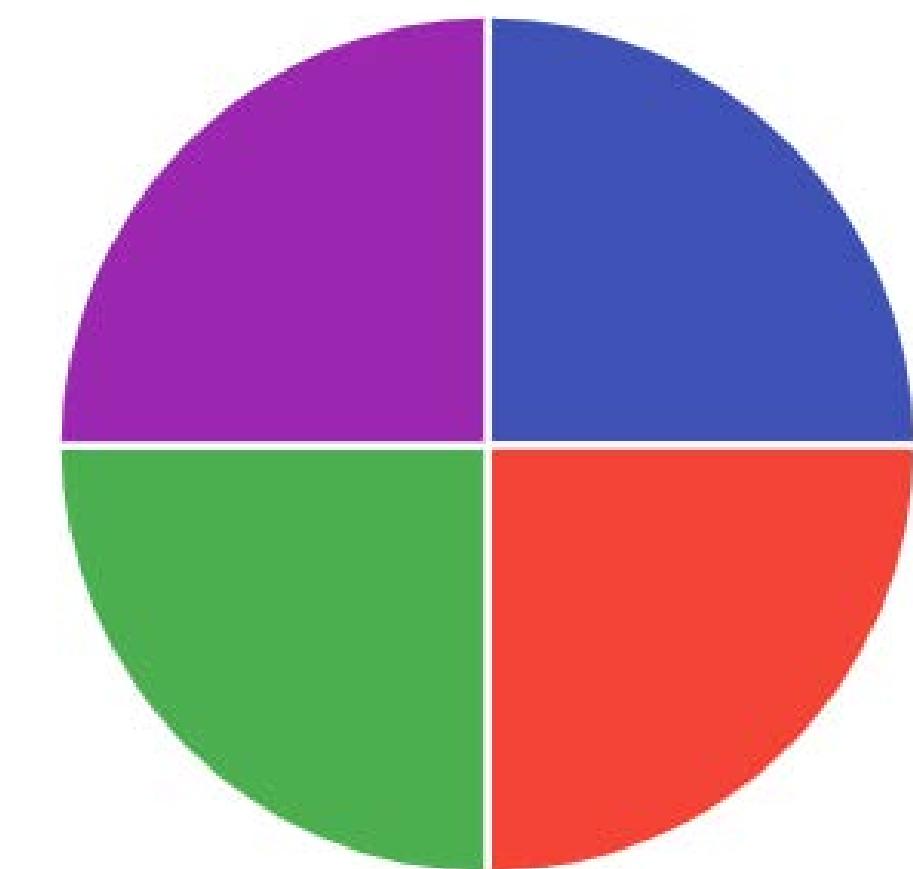
 Keep me signed in
SIGN IN

2 UPLOAD

1. On the **Home** page, select **Upload**
2. Click **+ Upload**
3. Click
4. Drag-and-drop files/folders or select them.
5. Set **Custodian/Source**.
6. Click **Next**.
7. Define the **Upload Name** and click **Start**.
8. View the status and progress of all uploads.

3 BROWSE

1. On the **Home** page, select **Browse**
2. Navigate through the data set by clicking the facets (pie charts).
3. View more or less facets with **Expand All** or **Collapse All**. You can also filter for a specific facet.
4. Click on the **Document List** icon to go directly to all the files of a specific facet selection.



4 SEARCH

Query Builder Timeline Saved Searches Save Query Clear ?
View as: Facets Document list

AND Enter Keywords

Fields Tags Review Status

1. On the **Home** page, select **Browse**
2. Enter keywords in the search box.
3. Combine with search operators (for example: AND/OR).
4. Select **Query Builder** to add (nested) subqueries with
5. Combine with none, one or several **Fields**, **Tags** and/or **Review Status** (see bottom row of image above).

6. Click
7. Save queries so you can use them again.
8. At any time, switch from **Browse/Facets** to **Document List**: [View as: Facets](#) [Document list](#)

Note: Searches (and search operators) are not case-sensitive. A search for DOC returns Doc, dOc, dOC, etc.

5 TAG

1. Switch from **Browse/Facets** to **Document List**
2. Click on a document to open it in **Document View**.
3. Select one or more tags you would like to apply to this document.
After selecting one tag, more related tags can appear.
Note 1: You might not have permission to use (all) tags.
Note 2: You will be notified of tagging errors or conflicts.
Note 3: Use **Bulk Tagging** to tag multiple documents at once.

Document Info ?

Tagging

All Applicable Tags

Relevant	SHIFT + R
Not Relevant	SHIFT + N
Further Review	SHIFT + F

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MULTIPLE WORDS

With operators AND, OR, NOT, W/n, n of {subquery1, subquery 2, ...}

Query

Results Explained

computer program	First word immediately followed by second word
computer and program	Both words are present, in no particular order/location
computer or program	At least one word is present
computer w/2 program	Both words must be present, within 2 words from each other
computer and not program	First word must be present, second word must not be present
3 of {blue, red, green, yellow, purple, black}	At least 3 or more words, from the list between the {} brackets, are present



TIPS & TRICKS

- In **Document View**, press Ctrl+F to search within a document. Hits are highlighted in pink.
- Avoid queries like *co*. Be specific.
- Use the ? wildcard instead of * for more accurate results.
- Hyphenated versions of search terms are also found. For example, query 'email' also finds 'e-mail'

FUZZY SEARCH

Allow 1 to 4 characters to be misspelled

Query	Result Examples
computer~1	computer, compute, commuter, etc.
computer~2	computer, compute, commuter, computw, comput, etc.



EMAIL ADDRESSES

Query	Results Explained
j.doe@company.com	Matches a single email address
*@company.com	Matches all email addresses from one company/domain

WILDCARDS

Replace missing and/or misspelled characters

Wildcard	Results Explained
*	Matches zero or more characters. For example: <ul style="list-style-type: none">*most returns: most and/or almostch*ter returns: charter, character, chapter
?	Matches a single character. For example: <ul style="list-style-type: none">wom?n returns: women and/or woman60? returns: 600, 601, 602, 603, 604, 605, 606, 607, 608, 609, 60a, 60b, 60c, 60d, etc.



EXPERT SEARCH

- Become a search expert: Go to docs.zylab.com and select Search. Select the **ZyLAB ONE Search Language Guide** link.
- Boost your search with Artificial Intelligence. Use **Assisted Review** for a thorough and efficient analysis of your data and find everything. For more information, go to docs.zylab.com, scroll down and select Assisted Review.

- Sign in to <https://help.zylab.com>
- In the upper right corner, expand the **My Support** menu.
- Select **Submit a request**.
- At a minimum, define the subject, description, priority and matter name.
- Keep colleagues informed by adding their email addresses in the CC field.
- Add attachments like screenshots or log files, if you have them.
- Click **Submit** to save your Support Ticket.

An alert will be sent to our SaaS team; they will follow up on your request.

