



# ZyLAB Web Client for Users





## Contact Us

For full contact details, visit the ZyLAB website - <https://www.zylab.com>

For support, submit a ticket on - <https://help.zylab.com>



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# Introduction to ZyLAB Web Client for Users

The ZyLAB Web Client uses ZyLAB scanning and full-text retrieval technology to provide transparent Internet or intranet access to scanned and indexed information. You can access the ZyLAB Web Client with any Internet browser and search for documents that contain the information you are looking for.

In ZyLAB Web Client, you can organize, group, print, upload and download documents from multiple indexes using all the features that make ZyFIND so powerful.

Using the ZyLAB Web Client, you can easily share information throughout your company even if you have offices in different locations. All you have to do is start your Internet browser and access the URL of your archive. The intuitive and fully customizable interface allows you and your colleagues to find what you are looking for.



# Log In

When you visit a web site that uses ZyLAB Web Client, the first action you have to perform as a user is to log in. For every site, a customized page layout can be designed, with the exception that the Username and Password boxes and the Login button are fixed properties.

The Register page asks for your name and password. If you are not registered yet, you can use the anonymous settings (if allowed for the site):

Username: anonymous

Password: anonymous

Click the Login button to proceed. **Note:** Pressing the Enter key will NOT work.

If you cannot get access, contact the ZyLAB Web Client administrator or the site's organization, and ask for a name and password.

When you have logged in the *ZyLAB Web Client Homepage* (page [6](#)) is displayed.



# ZyLAB Web Client Homepage

The home page appears after you have logged-in. It consists of three panels:

- The Search panel (see *Starting a Simple Search* (page [8](#))).
- The Tools panel (see *Search Tools* (page [23](#))).
- The Results panel. The Results panel can show both the results list (see *The Search Results Page* (page [10](#)) and the document opened from the results list (see *View (and Search) a Document* (page [13](#))).

The appearance of the home page depends on the template chosen in ZyINDEX for the web client. If buttons are visible depends on the type/configuration of the index, the web client option settings, and whether the results panel shows only the results list or also an open document.

The screenshot displays the ZyLAB Web Client homepage with three main panels:

- Search Panel (Left):** Shows a search interface with fields for "Search in last results" and "Search selected branch only". Buttons include "clear", "Search", and "Show all indexes".
- Tools Panel (Middle):** Titled "Contents of indexC", it lists files with their ranks:
  - rank 1: How to recover value added tax.pdf
  - rank 2: Purchasing and performing undeclared work in Sweden.pdfButtons for file management like copy, move, delete, and refresh are present.
- Results Panel (Right):** Titled "All Pages", it shows a large preview of a document titled "How to recover value added tax on goods bought in Sweden". The preview includes text in Swedish, English, and French, set against a background of coins.



## Menu Options

The home page Menu Options at the top of the page comprise the following buttons:



### Options

Define how results and documents are presented. See *Web Client Options* (page [56](#)).



### Upload

Uploads a new document to an index. See *Upload* (page [68](#)).



### Document Basket

Collect documents from several result pages. See *Document Basket* (page [67](#)).



### Log out user '..'

Log out, and be redirected to the Login page. See *Log In* (page [5](#)).

## Appearance Home Page

You can adjust the appearance of the home page with the following options:

- Adjust the width of the panels by dragging



- Maximize the Results panel (the Search and Tools panel will disappear)



- Minimize the Results panel (the Search and Tools panel will appear)

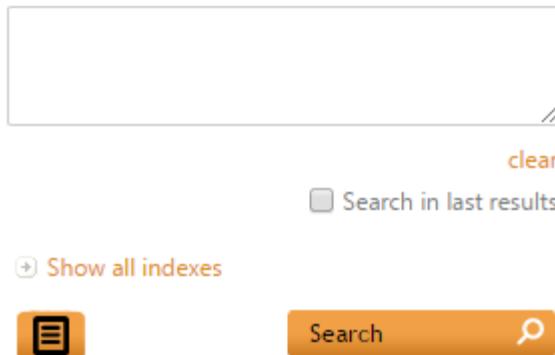




# Starting a Simple Search

As soon as you have successfully logged in you will see the home page containing the search panel where you can enter your search query.

The search method slightly differs based on the type of index that is being used (HAPI or TBIE). When using a TBIE index, it is now possible to work with huge result lists (like 100.000 results or more), with results appearing in a few seconds, usually less than a second. Therefore, it is not necessary anymore to sort in advance using the Sort dropdown menu.



1. Enter your search query in the search text box. You can use the full range of search techniques (see the *ZyLAB Search Language Guide*).
  - The search suggestions (autocomplete function) will help you in completing the query. As you type, several options to complete your search term will be given. The suggestions are sorted on occurrences, show the amount of occurrences, work over multiple indexes, and work on words that are part of a query (for example, batman AND rob should show suggestions for 'rob', like robin).
2. To search in the results of your last query, select the checkbox *Search in last results*.
3. To view all available indexes, click *Show all indexes*. Indexes to which you do not have access permission will not appear in the list.
4. To deselect all indexes, click *deselect all indexes*. You can also deselect indexes individually.
5. If you are finished with defining your search query, click *Search*.  
ZyLAB Web Client will execute the search statement and show you a results list.

For details about the Results page, see *The Search Results Page* (page [10](#)).



*Search Tools* (page [23](#)) are advanced features that allow you to store, reuse and expand searches. They can be used in support of your search or instead of your search. Depending on the template used, the icons are either always visible in a ribbon on the screen or are accessed using the Tools icon .



# The Search Results Page

The results page shows you a list of files that contain the words you entered as a search statement. Move your mouse over an entry to see a thumbnail preview of the file. Click on any entry to open the associated document in the same panel, replacing the results list. You can easily return to the results list by clicking the list button (*[View \(and Search\) a Document \(page 13\)](#)*).

Icons before each entry show the type of file:



Extra information is also shown for each document, for example available actions, the rank, the searched index, the hits and hit density, and the fields (if present). Searches giving many results are shown on extra pages, which are listed at the top of the results screen.

Columns can be moved to another position (to left or right).

Drag and drop a column (header) to change the column order. The column position will be remembered for this Web Client.

The tool buttons have the following functions:

- Toggle between selecting and deselecting all documents shown.
- Select which columns to be visible.



The screenshot shows a list of columns with checkboxes for selection. The columns are listed in rows:

	hits	rank	hiddensity
<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Property Columns</b>			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Field Columns</b>			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

reset

- Refine your results using the contents of fields. See [Refine Your Results](#). Enabled by the Show refine results option on the *Results Options* (page [59](#)) page.
- Edit document field values of selected documents.
- Put selected documents in your basket. See [Document Basket](#) (page [67](#)).
- Delete selected documents. The documents will be permanently deleted from your index.
- Export selected documents. Documents are exported as XML/Multipage TIFF, XML/PDF or Original/Single page TIFF.
- Merge selected documents.
- Add selected documents to the table of contents. See [Contents](#) (page [24](#)).
- Open in Fast Key Fielding Mode. See [Fast Key Fielding](#) (page [20](#)).
- Switch to facets. See [Facets](#) (page [21](#)).
- Refresh the contents of this page.
- (select a folder to copy or move to) ▾ Move or copy your documents to the selected folder.
- Add (upload) documents.
- Print selected documents. Enabled by the Show print button option on the *Global Options* (page [64](#)) page.
- Send selected documents. Documents are saved as a ZyMAILER document (ZYOUTPUT.ZDX). Enabled by the Show mail button option on the *Global Options* (page [64](#)) page.

Note: The following Star Tree and Tree Map buttons are enabled by the Show visualization buttons option on the *Global Options* (page [64](#)) page. See [Using the Visualization Module](#) (page [42](#)).

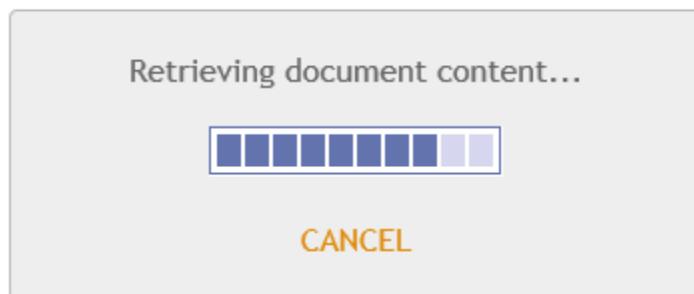


- Show Star Tree by group.
- Show Tree Map by group.
- Show Star Tree by order.
- Show Tree Map by order.



# View (and Search) a Document

Cancel the loading of a document by clicking the CANCEL button, shown in the middle of the document view area. You can also cancel the loading of the document by using the Next or Previous buttons.



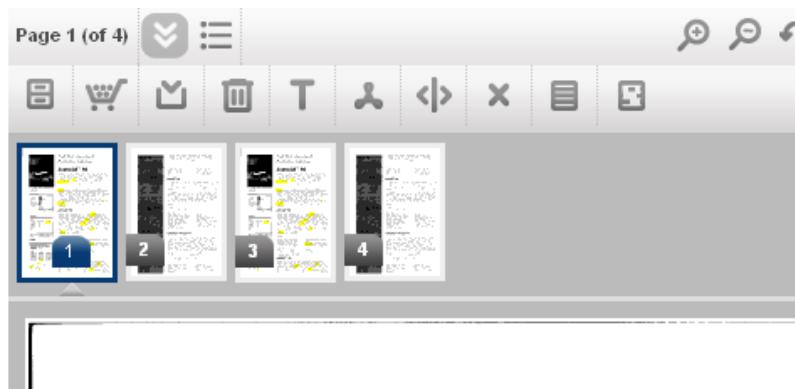
Click on an entry in the results list to open the associated document. Right click on a document to choose one of the following options:

- Locate in table of contents
- Launch in original application
- View as PDF

Depending on the type of document, the position in the document, and the Web Client configuration, some or all of the following navigation tools and actions become available to help you navigate through the hits and pages:

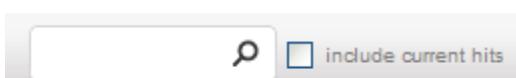
## Thumbnail view

- Enable thumbnail display on the *File Options* (page [61](#)) page.
- Define the number of thumbnails per page, and the size of the thumbnails.
- Click Save. A row of thumbnails of pages in the document is shown.



### Search in document

- First, select 'Show more document actions'
- Define a search query in the search box.



- To include the hits of the former search query, select the checkbox **Include current hits**.
- Click the magnifying glass. The search hits are highlighted in the current document.

### View and navigate through the document

- Go to the previous page.
- Go to the previous file.
- Shows all the pages as one scroll. Clicking a page or hit icon returns the view to a single page.
- Show the results list (closes the document).
- Go to the next file.
- Go to the next page.
- Go to the 'Previous Page with Hit' for ZySCAN documents or 'Previous Hit' for electronic documents.
- Go to the 'Next Page with Hit' for ZySCAN documents or 'Next Hit' or electronic documents.
- Zoom in.
- Zoom out.
- Rotate document left.
- Rotate document right.

### Use or edit the document

- Show/hide more document actions. This displays the document toolbar. Click the



icon again to hide the toolbar.

- Show the open document's key fields and properties in a pop-up panel. Click the icon again to hide the panel.
- Add document to the Table of Contents. This lets you add the document to an index's TOC. A dialog box appears to allow you to select an index and the TOC (sub-)folder (see *Contents* (page 24)).
- Put this document in your basket (see *Document Basket* (page 67)).
- Download this document. Downloads the currently open document and gives you the option to save the file or open it using the program associated with the file-type.
- Print this document (enabled on the *Global Options* (page 64) page).
- Delete the currently open document. The document is permanently deleted from your index.
- View as TIFF. Prints the currently open document to a TIFF file (a multi-page TIFF is created for documents of more than one page). You have the option to open or save the file. (Note: some picture viewers will only show the first page of a multi-page TIFF.)
- View as PDF. Prints the currently open document to a PDF file.
- Splits the document before the current page. When the index is built again, the two parts appear as separate documents with an incremental number appended to the file name.
- Delete current page from a multi-page document.
- Edit Fields. The field editor is opened to let you change the document's field values. You will not be able to search on those new values until you have built the index using ZyINDEX.
- Find near-duplicates. For more information, see *Find Near-Duplicates*.

## Additional functions

The TIFF buttons will only appear on Redaction indexes. You cannot redact in ZyLAB Web Client. You must redact in ZyVIEW.

- Convert this document to TIFF. This uses the ZyLAB TIFF Export printer to create TIFF files, which can then be edited (for example, redacted) (*Convert to TIFF for Redaction* (page 19)).
- Delete the converted TIFF file (the original document remains in the index).
- Switch between the TIFF file and the original document.

The View Translations button is only visible when the document was translated using ZyLAB Analytics Server.



-  View translations. A new window opens showing the translation either on its own or side-by-side with the original (this is set when the translation was created).



# Additional Viewing Functions

ZyLAB Web Client has some extra features to make viewing and working with documents easier.



## View Hit Highlighting in Adobe PDF Files

To be able to see hit highlighting in Adobe PDF files you must change a setting in Adobe Acrobat or Acrobat Reader. You must do this on each workstation or PC used to access the ZyLAB Web Client. (Make sure Adobe Acrobat or the free Acrobat Reader is installed. Visit [www.adobe.com](http://www.adobe.com) for more information.)

You cannot see PDF hit highlighting on the host server.

### Instructions

1. On the workstation open Adobe Acrobat or Acrobat Reader (v8.0 or higher).
2. Go to Edit > Preferences > Search.
3. Check the *Enable search highlights from external highlight server* checkbox.
4. Click OK.
5. If the ZyLAB Web Client is open, press key F5 to refresh the screen, and then do the search again.



## Convert to TIFF for Redaction

### Conditions

In a Redaction index (see the ZyFIND manual > *Create Redaction index* (page [53](#))) you need to convert a document to TIFF format so you can redact it in ZyVIEW. You have installed the ZyLAB TIFF Export printer driver (this appears in your printer list as "ZyLAB Tiff Export" printer). You have defined the TIFF conversion settings (see the ZyINDEX manual > ZyINDEX Options > TIFF Conversions Settings).

Note: Documents already in a TIFF format (for example, those created in ZySCAN) can be directly redacted (see the ZyFIND manual > Create Redaction).

### Instructions

1. The Web Client is showing a non-TIFF document.
2. Click the "Convert this document to TIFF" button A TIFF image is created from your document and is displayed on the screen.

Note that the TIFF buttons only appear when the index is a Redaction index.
3. To change between the original document and the TIFF image click the "Switch between TIFF and Original" button .
4. To delete the TIFF image, click the "Delete Converted TIFF" button .

Note: This will delete all TIFF versions, including redactions, of the original document.

5. If you want the TIFF version of a document to be opened in preference to the original document, click the Options button on the File tab check the "View TIFF Converted documents first" checkbox (*File Options* (page [61](#))).

### Result

A TIFF version of your document has been created, and it can now be redacted.

The TIFF file is saved in the index's Data >> TIFF folder. The TIFF file can be redacted in ZyVIEW.



## Fast Key Fielding

If you want to change the field values of a set of documents in the web client, using **different field values for each document**, use the Fast Key Fielding mode to walk through your documents:

1. Search index(es) using the web client.
2. Select the Open In Fast Key Fielding Mode button .
3. Change the field values of the first document.
4. Use the Next and Previous arrow buttons (or Ctrl < and Ctrl >) to go quickly through all the documents, changing field values as required.

You can also use this feature in ZyVIEW, where it is called Batch Field Editing. For more information, see ZyFIND Manual > Editing Field Values.



## Facets

Click  to switch to facets:



If no documents are shown, the documents do not have field values and the visualization is not set for the defined fields:



New Field Definition

Name Storage & Index Client ODBC Lookup

ZyFIND & Web client

Show as search field  
 Input required

Show in document viewer

Show in document list. Text length limit: 500

Use for visualization. Value separator: ,

Read-only

ZySCAN

Show in field editor

Common

Input required for update

Group

User interface control

OK Cancel

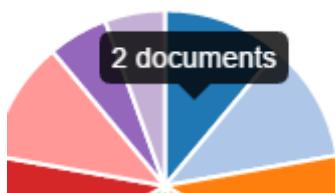
Please contact your Administrator.

Return to the documents list, by clicking [Switch to document list](#) in the top right corner.

Open or close a facet by using the + and - buttons:

- C
- + Fr
- + Se
- Co

Hover with your mouse above a facet for more information:





# Search Tools

To enhance your searches, use one or more Search tools. Almost any kind of search can be carried out, from exploring to get a sense of the available information to very precise searches targeting exact information.

The search tools are:

*Contents* (page [24](#))

*Search Folders: Add, Edit or Delete* (page [25](#))

*History* (page [27](#))

*Vocabulary* (page [28](#))

*Thesaurus* (page [29](#))

*Concepts* (page [30](#))

*Fields* (page [31](#))

*Subscriptions* (page [36](#))

*Taxonomy* (page [40](#))



## Contents

Contents allows you to structure your relevant documents in a Table of Contents and TOC sub-folders.

When you have searched for and found documents you can either add one or more selected documents in the results list to a TOC using the Add selected documents button , or you can add an open document to a TOC using the Add document to the table of contents button .

The Contents button shows the table of contents, and its sub-folders if they have been made. You can create new sub-folders by right clicking on the index or a sub-folder.

You can delete a sub-folder by right clicking on a sub-folder and selecting 'Delete folder'.

If you want to search on a selected folder (and sub-folders), select 'Search selected branch only'. The contents of a folder appear in the results panel, from where documents can be viewed.



## Search Folders: Add, Edit or Delete

Search Folders are pre-set search queries that automatically group the documents found by the search settings in a dynamic table of contents (TOC). There are two types:

Index-specific search folders which only find documents in the related index

Global search folders, which find documents in all the indexes in the Web Client. A global search folder can only be created and added using ZyFIND.

Search Folders can also be created in ZyFIND, which has more options available. Search Folders created in one program are usable in the other program.

### Conditions

You want to create, edit or delete Search Folders in Web Client. A Web Client is created, and one or more indexes are added. An optional Global Search Folder can be present.

### Instructions

1. Open your web client and select the Search Folders icon .
2. Right click on the folder you want to edit to display these four options:
  - Edit query
  - Delete query
  - Add folder
  - Delete folder
3. If you selected Edit query, the Edit search folder query dialog appears. You can adjust all settings which are available in ZyFIND too:
  - a) In the 'Search for' box, define a full text query.
  - b) Select a search method from the dropdown list box.
    - ZyLAB query (ZyINDEX will look for search operators, wildcards, brackets, etc., in your query)
    - All Words (automatically AND operators are inserted between the words)
    - Any Word (automatically OR operators are inserted between the words)
    - Exact Phrase (automatically all words are quoted)
  - c) Select Yes or No for Progressive search. A progressive search searches in the last results.
  - d) Define the search values of fields you want to include in the search.
  - e) Combine the selected fields with AND or OR.
  - f) Combine the fields and full-text query with AND or OR.
  - g) Click OK.
  - h) Refresh the browser window to implement the changes.



4. If you selected Delete query, the query defined for the folder is deleted immediately in both the Web Client and ZyFIND (reopen the index(es) in ZyFIND to see the changes).
5. If you selected Add folder, define the name of the new subfolder, and click OK. The folder is added to the Search Folder Table of Contents in both the Web Client and ZyFIND (reopen the index(es) in ZyFIND to see the changes). Edit the folder's query so it returns a results list - see step 3 above.
6. If you selected Delete folder, the folder is deleted immediately in both the Web Client and ZyFIND (reopen the index(es) in ZyFIND to see the changes).

### Result

You have edited Search Folders (in ZyFIND) through the web client.



## History

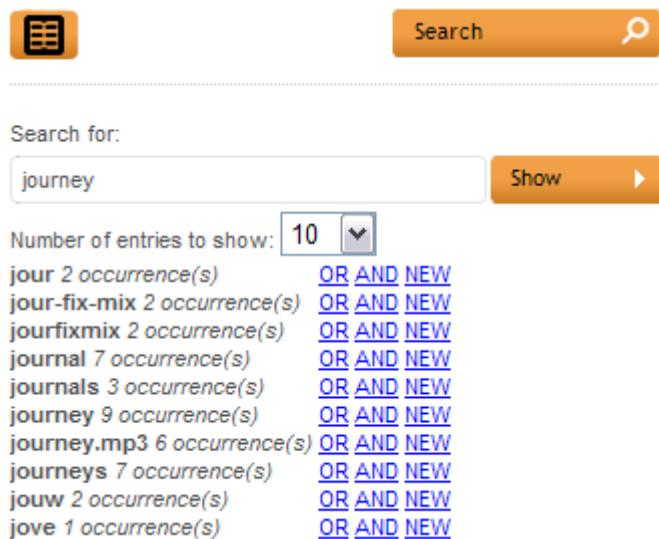
View and re-execute the queries you have made in the past. Click the history button  to show your search history. Click on a search entry to re-execute it.

If you want to use this search tool, go to Options  > Search > "Remember query history" and select either "Only when something is found" or "Always" (*Search Options* (page [57](#))).

## Vocabulary

The vocabulary tool  lists similarly spelled words found in the index. The number of similar words listed is set in the 'Number of entries to show' box.

Define the word you want to find, and define the total number of vocabulary entries you want returned. Click Show. A list of words and the number of their occurrences appears, with the defined word in or near the middle of the list. Click the AND, OR and NEW options to add the word to a search query. The results list immediately shows the documents found using the query.



A screenshot of a web-based vocabulary search interface. At the top, there is a navigation bar with a menu icon, a 'Search' button, and a magnifying glass icon. Below the search bar, it says 'Search for:' followed by a text input field containing 'journey'. To the right of the input field are two buttons: 'Show' and a right-pointing arrow. Underneath the search bar, there is a dropdown menu labeled 'Number of entries to show:' with the value '10' selected. Below this, a list of search results is displayed, each consisting of a term, its occurrence count, and two links: 'OR AND NEW' and 'NEW'.

Term	Occurrences	Links
jour 2 occurrence(s)	2	<a href="#">OR AND NEW</a>
jour-fix-mix 2 occurrence(s)	2	<a href="#">OR AND NEW</a>
jourfixmix 2 occurrence(s)	2	<a href="#">OR AND NEW</a>
journal 7 occurrence(s)	7	<a href="#">OR AND NEW</a>
journals 3 occurrence(s)	3	<a href="#">OR AND NEW</a>
journey 9 occurrence(s)	9	<a href="#">OR AND NEW</a>
journey.mp3 6 occurrence(s)	6	<a href="#">OR AND NEW</a>
journeys 7 occurrence(s)	7	<a href="#">OR AND NEW</a>
jouw 2 occurrence(s)	2	<a href="#">OR AND NEW</a>
jove 1 occurrence(s)	1	<a href="#">OR AND NEW</a>



## Thesaurus

Broaden the scope of your search statement by including synonyms.

Click the Thesaurus button . Define the word you want to find synonyms for. Click Show. A list of synonyms and the number of occurrences in the selected indexes appears. Click the AND, OR and NEW options to add the word to a search query. The results list immediately shows the documents found using the query.

The screenshot shows a search interface with the following elements:

- A top navigation bar with a magnifying glass icon, the word "Search", and another magnifying glass icon.
- A section titled "Synonyms for:" with a text input field containing the word "journey".
- A "Show" button next to the input field.
- A list of synonym suggestions:
  - cruise 5 occurrence(s) [AND OR NEW](#)
  - expedition 3 occurrence(s) [AND OR NEW](#)
  - itinerary 0 occurrence(s) [AND OR NEW](#)
  - trip 18 occurrence(s) [AND OR NEW](#)
  - tour 4 occurrence(s) [AND OR NEW](#)
  - voyage 222 occurrence(s) [AND OR NEW](#)
  - odyssey 0 occurrence(s) [AND OR NEW](#)
  - ride 50 occurrence(s) [AND OR NEW](#)
  - safari 0 occurrence(s) [AND OR NEW](#)
  - travel 11 occurrence(s) [AND OR NEW](#)
  - trek 0 occurrence(s) [AND OR NEW](#)



## Concepts



The Concepts button displays all available Concepts (predefined queries) that have been defined in the chosen index using ZyFIND.

Concepts are search statements. Define often-repeated searches as concepts in ZyFIND and save them for later use (see *Concepts: Predefined complex queries* (page **Error! Bookmark not defined.**)).

### Searching on a concept

1. Select a concept.  
All concepts that are defined in the chosen index are displayed.
2. Click Search.

### Searching on two or more concepts

1. Select a concept.
2. Click OR or AND of the next concept you want to search on.
3. Repeat step 3 until finished.
4. Click Close.
5. Click Search.



## Fields

The Fields tool allows you to search in your index's fields; this can be done as fields only, or in combination with a text search.

The Fields tab displays all available fields that have been defined in the chosen index. Note that fields must be defined in ZyFIND or ZyINDEX before they appear in the fields page. The Fields tab has the same function as in ZyFIND: Search on the meta data that is added to the documents during data processing.

### Instructions

1. Select the fields you want to search in and enter your query.  
All fields that are defined in the chosen index are displayed.
2. Click Search.
3. Select the Clear button to remove the queries.

### Result

All files that contain a search term within the area defined as the field are retrieved.

### Show Options

1. Click Show Options at the bottom left corner of the screen to view advanced search field options.

Type	<input type="text"/>
Exchange_Account	<input type="text"/>
Message	<input type="text"/>

.....

Show options

2. You can enhance your search with the following options:

- Combine Fields

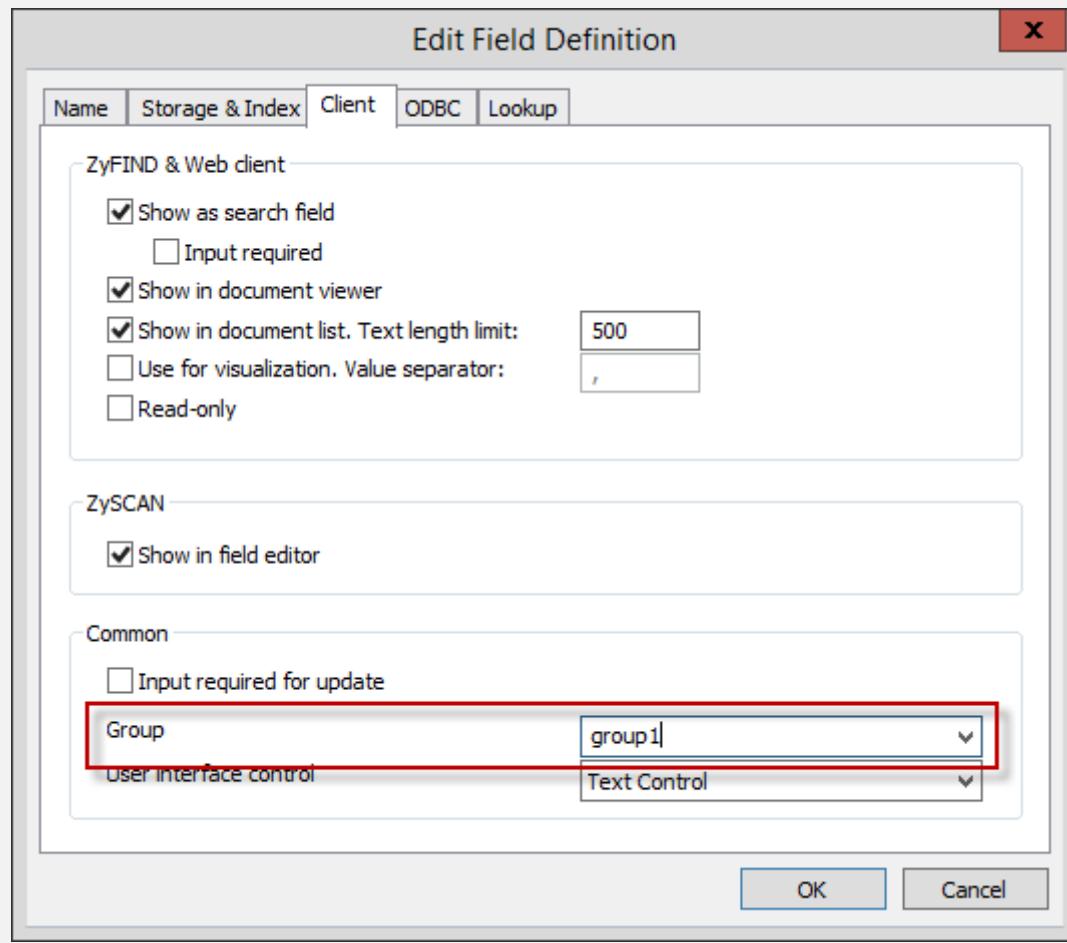
This allows you to search on combinations of fields (with full-text query) using the parameters AND or OR.



- Filter Field Groups

This allows you to view your fields grouped as Email header or Email properties. To view all fields again, simultaneously press the Ctrl button and click a group.

The groups Email header and Email properties are automatically added if the index has been created with the Email Archive TBIE template. You can manually add groups by adding a Group name to a collection of fields. For each field of your collection, go to the Edit Field Definition > Client tab and define the Group name.





Message

**Filter field groups**

Email header

Email properties

**Combine fields**

Combine selected fields using AND

Combine fields with full-text query using AND

Hide options

Clear

## Start New Search for Selected Field

1. Define a broad field search query. For example:

A screenshot of a search interface. At the top is a toolbar with icons for file operations like copy, paste, and search. Below it is a search bar containing the text "field01 h\*". To the right of the search bar is a magnifying glass icon representing the search button.

2. Click Search.
3. To narrow down your search for documents with a specific field value, right click on that field value and select 'Start new search for selected field'.
4. Now, only files with the selected field value will be shown in the result list:

A screenshot of a search results table. The table has columns: rank, hits, hitdensity, field01, and file name. There is one row of data: rank 1, hits 0, hitdensity 0.00, field01 hop, and file name README.TXT. Above the table is a toolbar with various icons for document management.

	rank	hits	hitdensity	field01	file name
	1	0	0.00	hop	README.TXT



## Add selected field to current search

1. Define a full text search query. For example:

The screenshot shows a search interface with a left sidebar and a main results table.

**Left Sidebar:**

- Search bar: fname=c\*
- Buttons: clear, Search in last results, Show all indexes, Search (orange button).
- Text input: field01

**Main Area:**

results page: 1 - 2

	rank	hits	field01	hitdensity	file name
16	0			0.00	coral10.txt
17	0			0.00	corii10.txt
18	0			0.00	cplnt10.txt
19	0			0.00	cptcw10.txt
20	0			0.00	cpwog10.txt
21	0			0.00	crfry10.txt
22	0			0.00	CROSSWD.TXT
23	0			0.00	crsnk10.txt
24	0			0.00	CRSWD-D.TXT
25	0			0.00	cstwy11.txt
26	0			0.00	cvilt10.txt
27	0	hip		0.00	contents.txt

2. To narrow down your search and add a specific field value to your search, right click on a field value and select 'Add selected field to current search'.

The screenshot shows a search interface with a context menu open over the 'hip' field value in the results table.

**Context Menu Options:**

- Locate in table of contents
- Launch in original application
- Start new search for selected field** (highlighted in orange)
- Add selected field to current search

3. Now, only files with the selected field value will be shown in the result list:



The screenshot shows a search interface with the following elements:

- Search Bar:** A text input field containing "fname=c\*" with a "clear" button below it.
- Search Options:** A checkbox labeled "Search in last results" and a link labeled "+ Show all indexes".
- Search Buttons:** A "Search" button with a magnifying glass icon and a "Results" button with a document icon.
- Result Table:** A table with columns: rank, hits, field01, hitdensity, and file\_name. One row is visible: rank 1, hits 0, field01 hip, hitdensity 0.00, and file\_name contents.txt.
- Query Input:** A text input field at the bottom left containing "field01 hip".

The field query will be added to the correct field in the Fields tab. If the field query does not show or you get a warning, you might have the wrong fields displayed (from a different index).



## Subscriptions

The Subscription tool  allows people who receive alerts to edit their alerts. The search queries can be adapted so the information sent to the users will be the information that matches their search query. It is also possible to subscribe to new alerts and configure them. See *Subscriptions to Alerts* (page 37).



## Subscriptions to Alerts (create / edit / delete)

To determine what kind of information will be sent to you, use the register pages from ZyALERT. These pages allow people who receive alerts to edit their alerts. The search queries can be adapted so the information sent to the users will be the information they long for now. It is also possible to subscribe to new alerts and configure them via the web client.

### Conditions

A Web Client is created. You are logged in as a user with an account in ZyALERT. **Attention:** Without an account in ZyALERT you cannot create new subscriptions! For more information on creating an account in ZyALERT, see the ZyALERT Manual > Add, Edit or Delete Users.

### Instructions

1. Open the correct Web Client.
2. Select Subscriptions  from the menu.
3. To delete a subscription, click .



4. To edit a subscription, click .
5. To create a new subscription (for a specific index), select the index and click New Subscription.

 Subscription - Windows Internet Explorer provided by ZyLAB

**NEW SUBSCRIPTION**

**Search**

What do you want to search for?

What method do you want to use for searching?    
ZyLAB query

What degree of fuzzy do you want to use?

In which archive do you want to search?

**Schedule**

How often do you want to receive your subscription?

At what day and time do you want to receive your subscription?  
 I want to receive information related to new or changed documents only. The subscription should be backdated to:

day-month-year-hour-minute  
 day-month-year-hour-minute

6. Define the Search and Schedule options.
7. Click Update.

## Result

You have created a new subscription (or edited/deleted one).



## Note

The email below is based on the template "mailing" and contains not only links to the information you subscribed to, but it also contains links to the web pages "subscriptions" and "subscriptionedit". The web page "subscriptions" gives the user the possibility to maintain all subscriptions in his or her name.

From: marc@zylab.nl  
To: marc@zylab.nl  
Cc:  
Subject: ZyALERT profile: Test; user: marc; at 06/20/02 14:30:35, 1 of 1 messages

Sent: Thu 6/20/2002 2:31 PM

**ARCHIVE, SEARCH, FIND, ORGANISE, SHARE and REPRODUCE  
all your information**

**POWERED by  
ZyLAB®**

The query **g\*** in Index **Test** resulted in **1** hits in **1** files.  
The search results page contains the files ranked **1** to **1**, sorted on **Hit density (descending)**.

Rank	Info
1	C:\PROGRAM FILES\ZYLAB\TEST\TXT\New Text Document.txt : <b>30000</b> relevance, <b>39</b> bytes, <b>39</b> hit(s), in index <a href="#">ZyDOCDATABASE</a>

**1 - 1**

Click here to edit this [alert](#).

Click here to manage all your [alerts](#).

Copyright © 1995-2002 [ZyLAB Technologies B.V.](#)



## Taxonomy

A taxonomy enables you to classify and manage your documents, based on hierarchical structures. An existing taxonomy may be linked to a ZyLAB index, ensuring faster and more precise access to relevant information. The classification values will be part of the document, stored as field values belonging to the field Taxonomy. This enables dynamic structuring of information, which saves storage space and enhances search capabilities.

### Conditions

A taxonomy index must exist and be attached to a taxonomy value file (see the ZyINDEX manual > Taxonomy Field Index). A Web Client must exist with the taxonomy index attached (see the ZyLAB Web Client for System Administrators manual > Create and Edit a Web Client).

### Instructions

1. Open the Web Client.

Make sure the Taxonomy index either is the only selected index or is displayed on top of the index list.

2. Select the Taxonomy tab.
3. Double click on a folder to display the results list.
4. Add (taxonomy) field values via Edit document field values of selected documents. Select the Taxonomy field and use the Taxonomy Browser (displayed below the Taxonomy field) to make a selection. To make multiple selections, press Alt and select as many selections as you like. Click Save Multiple Selections.
5. Go to ZyINDEX and build the index.

### Result

You created a Taxonomy index, added documents and (taxonomy) field values. Now, you can search the index using either ZyFIND > Fields, or in the Web Client using the Taxonomy button to display the Taxonomy Browser. Use the ALT key to make multiple selections and click the Search button to display the results list.



# Visualization

The ZyLAB Visualization Module provides two ways for users to quickly and easily assess the full palette of file information available to them. The foundation of this module is a hyperbolic tree, which allows users to view and present their information on an easy-to-use, interactive, multi-dimensional tree, with additional visual navigation features such as location, color, size and spatial orientation. The Visualization Module also offers a tree map for quick comparative analysis of large hierarchical structures.

Visualization comprises:



## Star Tree

Presents each file as a node that can be clicked on to access the file or grabbed and pulled for better viewing of subfolders. See *Using the Visualization Module* (page [42](#)).



## Tree Map

Enables users to compare nodes and sub-trees even at varying depth in the tree, helping users spot general patterns and exceptions. See *Using the Visualization Module* (page [42](#)).

Furthermore, you can view all document in a timeline and/or view the location (when specified) of all documents in a map.

If you do not see the Visualization buttons, enable them via the *Web Client Options* (page [56](#)).



## Star Tree or Tree Map

### Instructions

1. Open and login to a Web Client with an added Visualization index. For more information, see the ZyINDEX manual > Advanced indexing > Field Definition Option: Use for visualization.
2. In the Contents tab, you can click the Star Tree or Tree Map button , to view all documents in the Table of Contents.

If you do not see the Visualization buttons, enable them via the *Web Client Options* (page [56](#)).
3. Alternatively, you can search the index and use the Show Star Tree by group /order and Show Tree Map by group /order buttons to view the result list.
4. To search and analyze the Star Tree use position, color, size and focus.
  - To centralize the Root node, select the Center icon.
  - To reduce the distance between nodes, select the Shrink Tree icon.
  - To enlarge the distance between nodes, select the Expand Tree icon.
  - To change the layout of the nodes, select the Change Orientation icon.
  - To change the text size, use the Increase and Decrease Font Size icons.
  - Select nodes and drag them around for a better view using the mouse.
5. Treemap is a space-filling visualization for hierarchical structures. It is particularly effective in revealing attributes of leaf nodes using size and color-coding. Treemaps enable users to compare sizes of nodes and of sub-trees, and can reveal patterns and exceptions.

See *Choose algorithm, font size, and borders* (page [43](#)).

See *Choose size, color, and label attributes* (page [44](#)).

See *Filter your data* (page [45](#)).

See *Create (Flexible) Hierarchies* (page [46](#)).



## Choose algorithm, font size, and borders

To choose algorithm, font size, and borders use the Main tab.

### *Treemap implements three Layout Algorithms*

**Slice And Dice** - Stable and ordered, but poor aspect ratio. It can generate long skinny rectangles, but is very good to compare sets of items side by side. Note the "flip slice and dice option".

**Squareified** - Best aspect ratios, unordered, medium stability. The nodes will move when the size changes.

**Strip** - Ordered, moderately good aspect ratios with some exceptions, medium stability. The nodes move, but not as often as in Squareified Algorithm.

You will find that the best choice of algorithm depends largely on your data and task, so try all three versions using the menu in the "Main" tab.

Note that in all the cases, nodes that have a size of zero will not appear on the screen, and that subtrees that have too many nodes to be drawn will appear black because the 1 pixel border drawn to separate nodes are black.

### *Label font size*

Making the size = 0, hides the labels but their values remain visible on the cursor activated popup window.

### *Border padding*

This padding helps see the grouping of nodes in subtrees, but pixels are "lost" with this padding. So reducing the size of the padding may reveal more nodes. Reducing the font size also helps regain pixels.

Hide borders: will remove ALL borders and padding so that every pixel is dedicated to the painting of nodes. However, watch out that adjacent nodes of the same color will appear to be merged. Turning this control on and off several times is helpful to gain an understanding of the structure of the tree and see details as well.

Restore default settings in Treemap: simply reloads the file you last opened.



## Choose size, color, and label attributes

To choose size, color, and label attributes use the Legend tab.

### *Label attribute*

By selecting "None" all labels will be removed, but you might prefer to set the font size to zero so that the pop-up still displays some information about the node.

### *Size attribute*

Only numerical attributes will appear in this option box. If the attribute has negative values they will be handled as zero, i.e. the node will not be visible.

### *Color attribute*

If you choose a numerical attribute, a color legend and color binning panel will appear.



## Filter your data

### *Nodes*

You can choose to hide filtered nodes automatically.

#### Hide Filtered Nodes.

Hiding filtered nodes is particularly useful to reclaim the pixels of the filtered out nodes to show more details on the remaining nodes. Note that the layout will most likely change drastically.

#### Hide Individually Selected Nodes

- To select nodes, click on the nodes or subtree border while holding the CTRL key down.
- The nodes' border will become dark blue.
- The nodes are removed when you click on Hide Selected button.

#### Show All Nodes.

### *Filter by Maximum Depth*

By filtering by depth, you can aggregate the lower levels of the tree.

The size is (by definition) aggregated using a "sum" function.

### *Filter on Name, Value and Link*

Select Show all, or one or more fields/values/links.



## Create (Flexible) Hierarchies

Some data is best presented with a fixed hierarchy. For example, census data falls nicely in a hierarchy of country, states, counties, and blocks, which could not be rearranged. Some other data could be rearranged using various hierarchies based on the attributes available. For example, if you have health data provided for the 2 sexes, 3 races and 5 age groups, you could present the data in a variety of ways. One example would be by separating men and women at the 1st level, then splitting by race at the second level and then by age. Another hierarchy could be to split by age first, then sex, then race. Flexible hierarchies let you specify the order you want those attributes to be used when creating the hierarchy.

If the (xml) data file you are using has a default hierarchy, you can first remove the default hierarchy. All nodes will appear together on the treemap without any hierarchy. Now you can create your own hierarchy.

Choose from the list of available attributes (at the bottom), then click on the "Add" button and the attribute will be added in the Hierarchy List.

Attributes that have only a few values (for example, sex or race) make good hierarchy attributes. Others like "age" need to have their values grouped in bins to split the tree nicely, e.g. you can split between young and old people by binning the age attribute into 2 bins. To BIN an ATTRIBUTE, click on the right most cell of the corresponding hierarchy attribute table.

To remove an attribute, select the attribute and click the "Remove" button.

You will find that it is better to use the last/bottom attribute as the label attribute and remove it from the hierarchy definition.

You can create different permutations of the attributes in the Hierarchy List by using "Up" and "Down", or "auto", to permute automatically and review the many options. Treemap redraws the tree as you change the hierarchy.

Once you are happy with a hierarchy you can give it a name (by typing a new name where it says "hierarchy: 1") and you can use the "New" button to create another hierarchy. Remember to save the settings as well!

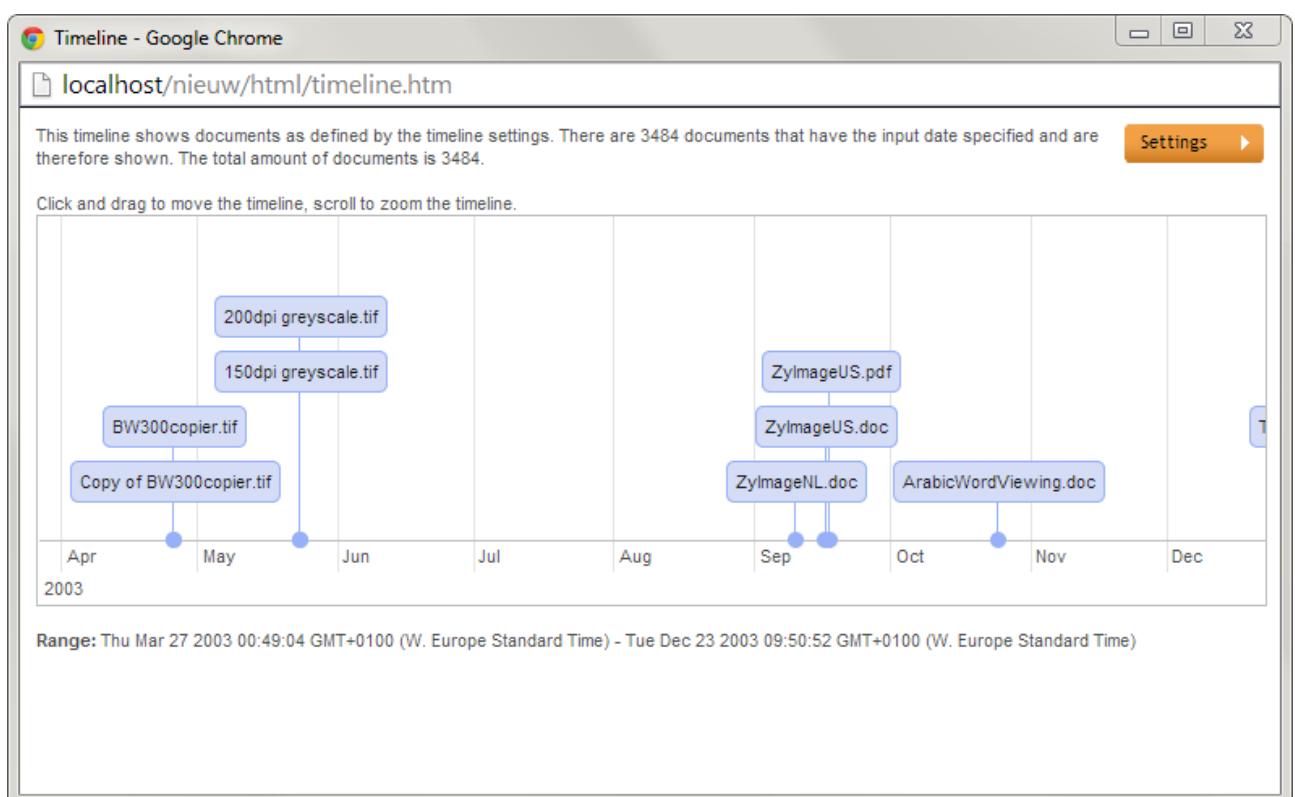


## Timeline of All Documents

All documents will be shown in a timeline.

### Instructions

1. Open and login to a Web Client with an added Visualization index. For more information, see the ZyINDEX manual > Advanced indexing > Field Definition Option: Use for visualization.
2. Above the result list, select the Timeline icon   
If you do not see the Visualization buttons, enable them via the *Web Client Options* (page [56](#)).
3. The Timeline will appear.



- Click and drag to move the timeline.
- Scroll to zoom the timeline.
- Click on a file to open it.

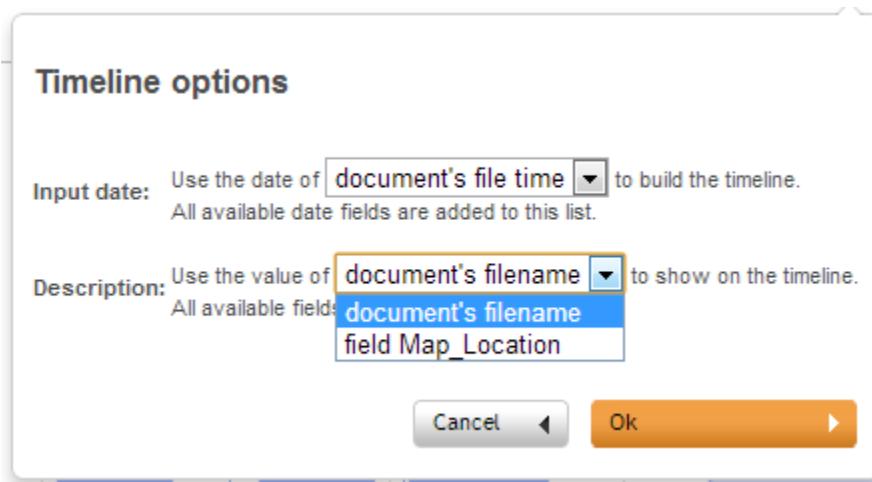


- View the range of the timeline at the bottom of the screen.

4. To edit the timeline options, select the Settings button:

Settings ▶

The Timeline options window will appear.



- For both the Input date and the Description a dropdown list is shown with the available (date) fields. If no additional fields are available, only one option can be chosen.



## Location of All Documents

Documents will be shown on a map using the geo information in a field. This geo information consists of coordinates. Based on this information a marker will be placed on a map. When you hover with your mouse over a marker, a pop up will appear with document information (fields). When you click on the link, the document will be opened.

### Instructions

1. Open and login to a Web Client with an added Visualization index. For more information, see the ZyINDEX manual > Advanced indexing > Field Definition Option: Use for visualization.

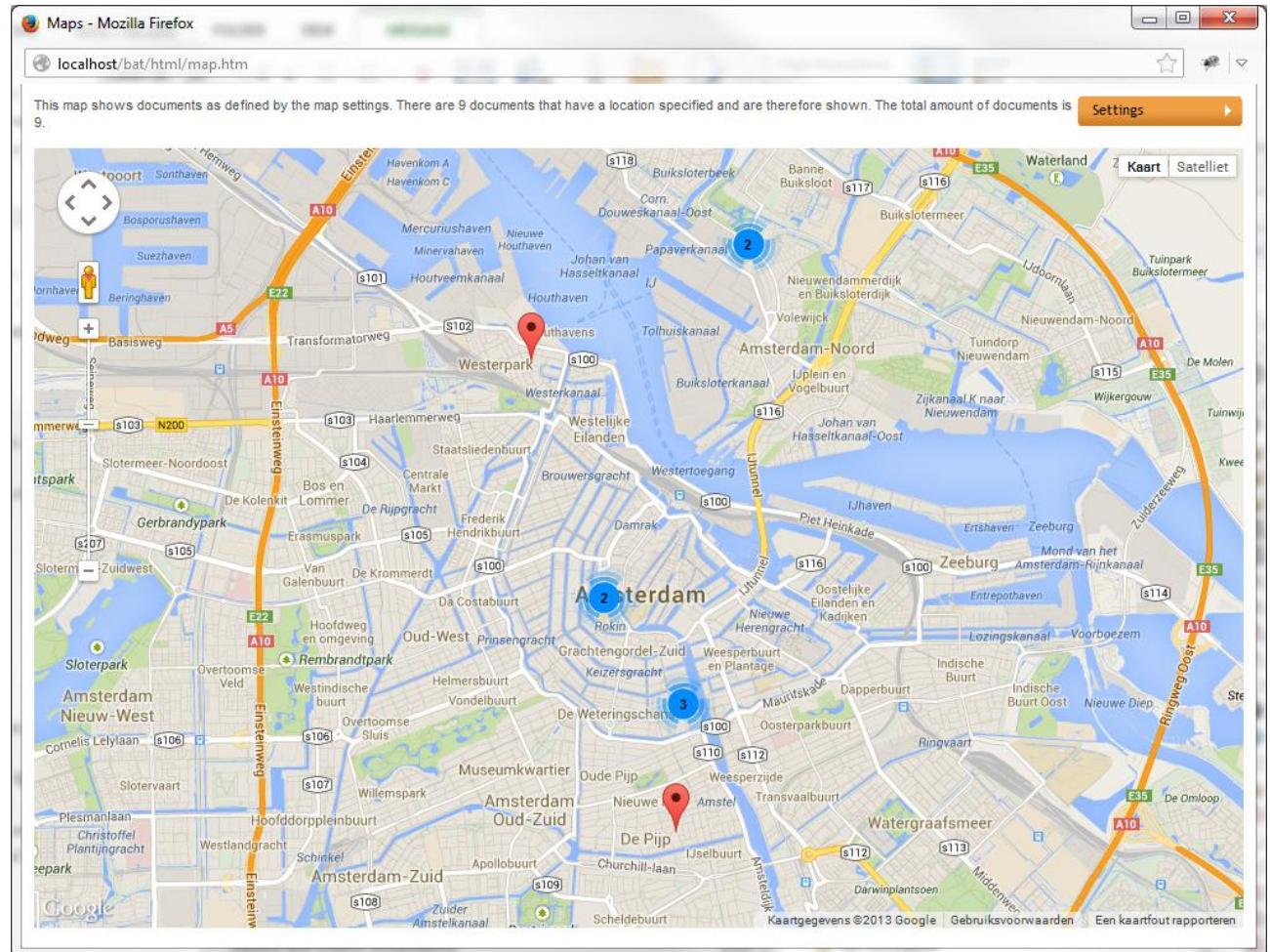
Make sure that this Visualization index contains a plain text field names 'Map\_Location' and that locations are added to this field. The format is the latitude followed by the longitude separated by a comma. For example, '40.7142691,-74.0059729' to locate New York.

2. Above the result list, select the Location icon  (Show map with all documents).

If you do not see the Visualization buttons, enable them via the *Web Client Options* (page [56](#)).

3. A map with all documents will appear.

Markers indicate the location of documents. Click on a marker (red for one document on that location, blue for two or more documents on that location) to reveal a dropdown with document field information. Select to open the document.



4. To edit the timeline options, select the Settings button:  
The Timeline options window will appear.

**Settings**



## Map options

- Input:** Use the value of  to populate the map.  
All available plain text fields are added to this list. The selected field should contain the latitude followed by the longitude separated by a comma. For example 40.7142691,-74.0059729 to locate New York.
- Description:** Use the value of the  to show in the markers info window.  
All available fields are added to this list.
- Key:**  A Google Maps API Key is required here.  
See Google Maps documentation on generating the free API key.

Cancel

Ok

- For both the Input and the Description a dropdown list is shown with the available fields. If no additional fields are available, only one option can be chosen.
- A Google Maps API key is needed to view the locations on the map. Instructions to obtain the API key can be found here:  
[https://developers.google.com/maps/documentation/javascript/tutorial?hl=nl#api\\_key](https://developers.google.com/maps/documentation/javascript/tutorial?hl=nl#api_key)



# Redactions

Redaction is the careful editing of a document to remove confidential information. Sensitive government documents, confidential legal documents, insurance contracts, and other sensitive documents are often redacted before being made available to the public.

Redactions makes it easy for you to mark sections of a document. You can then redact the document so that the sections you specified are blacked out or replaced with something else. You can either print the redacted document or use it electronically. In the redacted version of the document, the redacted text cannot be converted back to text or retrieved.

Documents produced as XML/TIFF and TXT/TIFF files in ZySCAN can be directly redacted. Electronic documents built directly into an index must first be converted to the TIFF format using the TIFF Conversion feature in ZyVIEW or Tiff-on-the-fly in the Web Client.



## Create Redaction index

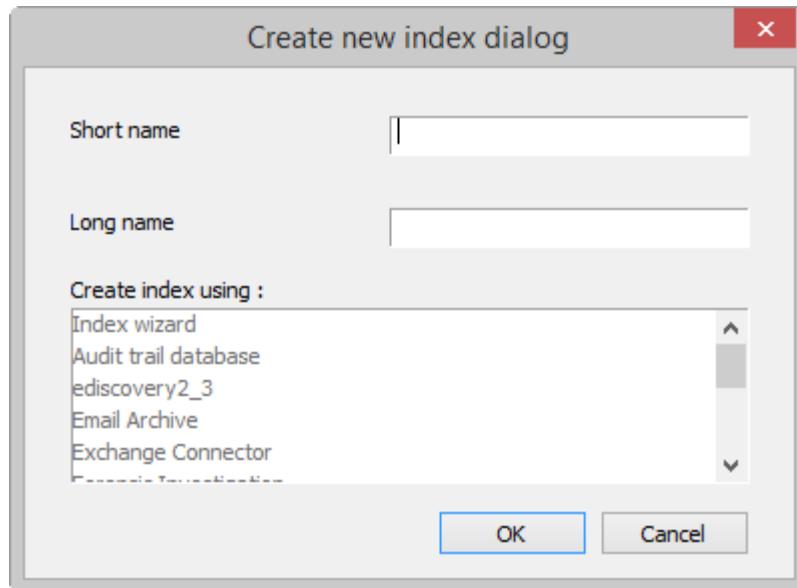
### Conditions

ZyINDEX is open.

### Instructions



1. Click the BUILD icon: Build.
2. Go to File > New.



3. Enter a Short name (max. 8 characters).
4. Enter a descriptive Long name (max. 80 characters). Use the name to describe the contents of the index.
5. Select Redaction.
6. Click OK.

### Result

You have created a Redaction index (with XML Wrapper and Redaction field). Now, add ZySCAN and/or electronic documents to this index and redact the documents via ZyFIND > ZyVIEW or add the Redaction index to a Web Client and redact files via the Redactions icon .



## Using Redaction

### Conditions

You have executed a search, and opened a document. You want to add a redaction.

### Instructions

1. Select the Redactions icon . This icon is only available when a Redaction index is added to the Web Client.
2. Select the check box Redaction Editor. The Redaction Editor dialog appears.
3. In the Display tab, define the text that must replace a section.
4. Define the font, style, size, color and background of the redaction. In addition, you can select the possibility to strikethrough and/or underline your redaction.
5. Select the Fields tab.
6. Define a description for the redaction.
7. Select exemption code(s).
8. Select the Properties tab.
9. Define if the redaction should be private. In other words, only shown to the person who created the redaction.
10. Define the Author, Source and Creation date of the redaction.
11. Drag the new redaction onto the document.

To resize a redaction, select the Shift key, select the redaction and drag the mouse to resize your redaction.

To copy a redaction, select the Ctrl key and click on the redaction once. Drag and drop the copy of the redaction with the mouse.

### Result

You have created a Redaction.

### Note

To define where you want to show the Exemption Codes, go to Redactions  > Show Exemptions and choose from:

- Left Aligned  
Displays exemption codes left aligned.
- Track Redaction  
Displays exemption codes on the redaction itself.



- Off  
No redaction codes are displayed.

Via the Redaction Editor you are able to:



Select all redactions on page

- Redact all hits
- Unredact all hits
- Delete selected Redaction
- Reload redactions
- Save redactions



# Web Client Options

The Web Template options let you adjust the way the results and documents are presented and displayed. Click the Options button to display the Options page. The page has the following tabs:

*Search* (see "*Search Options*" page [57](#))

*Results* (see "*Results Options*" page [59](#))

*File* (see "*File Options*" page [61](#))

*Global* (see "*Global Options*" page [64](#))

You can find information about editing web templates in the Templates and Styles topic.

Click Save to save any changes you made. To return to the default settings, click Load Default Settings.



## Search Options

The Search options page defines how searches are made.

**Options**

Search | Results | File | Global

Look for	ZyLAB query
Date	Anytime
Maximum number of indexes to show	0
Number of query box rows	3
Remember query history	No
Search suggestions	<input checked="" type="checkbox"/> Enable search suggestions <input type="radio"/> Sort by alphabet <input checked="" type="radio"/> Sort by occurrences
Search Tools	<input checked="" type="checkbox"/> Contents <input checked="" type="checkbox"/> Search Folders <input checked="" type="checkbox"/> History <input checked="" type="checkbox"/> Vocabulary <input checked="" type="checkbox"/> Thesaurus <input checked="" type="checkbox"/> Concepts <input checked="" type="checkbox"/> Fields <input checked="" type="checkbox"/> Subscriptions <input checked="" type="checkbox"/> Taxonomy
Search tool to show at start up	Fields
Search tool selection	<input type="radio"/> Selection by tab control <input checked="" type="radio"/> Selection by drop-down menu control

Cancel Save Load Default Settings

### Look for

Choose from the list box to search the ZyINDEX query, all words, any of the words or exact phrase.

### Date

Select a date to define the period to search in.

Define the **Maximum number of indexes to show** and the **Number of query box rows**.

### Remember query history

Choose from 'No', 'Only when something is found' and 'Always'.

### Search suggestions

When defining a search term, search suggestions are given (based on the indexed content) when this



option is enabled. Search suggestions will be shown after 3 inserted letters/numbers. The search suggestions can be sorted on alphabet (from a to z) or (number of) occurrences (from high to low).

### **Search Tools**

Select the Search Tools you want to be available for the Web Client.

- Contents (locate documents via Table of Contents)
- Search Folders
- History (reuse previous searches)
- Vocabulary (find related documents)
- Thesaurus (broaden the scope of your search statement and include synonyms)
- Concepts (use (complex) search statements with a name)
- Fields (meta information: Search for information **about** your documents)
- Subscriptions (determine what kind of information will be sent to you via alerts)
- Taxonomy (classify and manage your documents, based on hierarchical structures)

### **Search tool to show at start up**

Select a search tool to open the Web Client with at start up. You can choose from Contents, History, Vocabulary, Thesaurus, Concepts, Fields, Subscriptions, and Taxonomy.

### **Search tool selection**

Define how you want to select search tools, via tabs or a dropdown menu.



## Results Options

The Results Options page defines how results are displayed.

### Options

Search | **Results** | File | Global

Results per page: 15

Rank search results on: Number of hits  
Descending

KWIC options:  Enable KWIC, display type:  
Compact

Show: 1  
hits with: 3  
words around hit

Enable functions in toolbars:  Toolbar function to select all entries  Show or hide all fields  
 Delete entries  Move entries  Copy entries  Select target toc (for move or copy)

Search result options:  Shorten long field contents to no more than 20 characters

Default action: File display

**Cancel** **Save** **Load Default Settings**

### Results per page

Select the maximum number of files you want to display in the View Page.

### Rank Search results on

Define the way files are ranked. You can choose between Number of hits, Hiddensity, File size, File date, Comment, File Name and File path.

Choose between Ascending and Descending.

### KWIC options

The options are:

- Enable KWIC
- Display type: Compact or Separated. Compact displays all contexts one after the other, Separated displays all contexts on a separate line



- Show  $n$  hits with  $n$  words around hit: Defines the maximum number of hits shown per result, and the number of words (maximum 50) around the hit.

#### **Enable functions in toolbars**

- Toolbar function to select all entries
- Show or hide all fields
- Delete entries
- Move entries
- Copy entries
- Select target toc (for move or copy)

#### **Search result options**

'Shorten long field contents to no more than  $n$  characters' displays only the first part of a field's contents to decrease the width of the search results screen.

#### **Default action**

- File display
- Launch file in original application
- View as PDF
- View as multi-page TIFF



## File Options

The File Options page controls what you will see when an item is opened.

The screenshot shows the ZYLAB Options interface. The top navigation bar has tabs for Search, Results, File (which is highlighted in blue), and Global. The main content area is titled 'Options'. It contains several configuration sections:

- Control which page will be viewed first:** A radio button group with 'First page' (selected) and 'First hit'.
- What to display, and which image quality to use:** A section with:
  - A checked checkbox labeled 'Images' and a dropdown menu for 'Image quality' set to 'Medium'.
  - A checked checkbox labeled 'Original format' with several sub-options checked: 'Document properties', 'Show hidden rows/columns/sheets', 'Show hidden text', 'Show change tracking', and 'Show table of contents'.
  - A checked checkbox labeled 'Highlights'.
  - An unchecked checkbox labeled 'Shorten long field contents to no more than 35 characters'.
- Thumbnail display for viewed documents:** A section with:
  - A checked checkbox labeled 'Enable thumbnails'.
  - A dropdown menu set to '8'.
  - A dropdown menu set to 'per page, size: Small'.
- View TIFF converted documents first:** A checked checkbox.

At the bottom right are buttons for Cancel, Save, and Load Default Settings.

### Control which page will be viewed first

Choose whether you want to view the first page of a file, or the first hit within a file.

### What to display, and which image quality to use

**Images** displays the image format. Choose the **Image quality**: low, medium, high, 200% enlarged, 280% enlarged, 400% enlarged and TIFF.

Specify whether the **Original format** must be displayed. If it is not displayed then an ASCII file is displayed containing the text of the original file. With the original format you can also view the following:

- **Document properties.** These are the document properties stored by the original program.
- **Show hidden rows/columns/sheets.** These are rows/columns/sheets normally hidden by the program used to create the file (for example Excel).
- **Show hidden text.** This is text normally hidden and comprises reference codes and text marked as hidden by the program used to create the file (for example Word).

- **Show change tracking.** Will show change tracking marked as hidden by the program used to create the file (for example Word).
- **Show table of contents.** Will show (for electronic documents) the table of contents. If you click on it, the correct chapter will appear.

The screenshot shows the ZYLAB software interface. On the left, there is a vertical sidebar with a search bar containing the text "Search" and a magnifying glass icon. Below the search bar are several dropdown menus and buttons. A red circle highlights the search bar and the sidebar area. To the right of the sidebar is a "Table Of Contents" section. This section features a grid of eight small thumbnail images, each labeled with a number from 1 to 8. Below the thumbnails is a list of topics under a heading "Table Of Contents". The list includes:

- [Heading 1](#)
  - [Subheading 1](#)
  - [ZyIMAGE Standard](#)
  - [ZyIMAGE Additional](#)
  - [ZyIMAGE Solutions](#)
  - [Create an index](#)
  - [Create a job template](#)
  - [Processing a job](#)
  - [Scan](#)
  - [Import](#)
  - [Add fields](#)
  - [Add fields and field values to electronic documents](#)
  - [OCR](#)
  - [Export](#)
  - [Build the index](#)
  - [Maintain your indexes](#)
  - [\(Semi-\)automatic job processing](#)
  - [Select index\(es\)](#)
  - [Full-text searching](#)
  - [Search tools](#)
  - [Search techniques](#)
  - [View](#)
  - [Organize](#)
  - [Customize](#)
  - [Share](#)
  - [Glossary of terms Annotations](#)
  - [Bookmarks](#)
  - [Contents](#)
  - [Document viewer](#)
  - [Fields](#)
  - [Field types](#)
  - [Hash code](#)
  - [Quick Build](#)
  - [Hit density](#)
  - [WYHIMYG](#)
  - [Hit highlighting on the image](#)

Note that these options are disabled if **Original format** is not selected.

Specify whether the **Highlights** (these are the hit highlights) are shown.

**Shorten long field contents to no more than n characters** reduces the length of a field's contents to the first  $n$  characters, but will also disable the hit highlighting in fields.



#### **Thumbnail display for viewed documents**

To view a small image of a page in advance, select the checkbox Enable thumbnails. Select the maximum number of thumbnails per page, and the size of the thumbnails. Choose from default, small or large.

#### **View TIFF converted documents first**

Views the TIFF version of a file first.



## Global Options

The Global Options page controls the web client style and the visibility of some buttons.

A screenshot of the Global Options page. At the top, there's a navigation bar with tabs: Search, Results, File, and Global (which is selected). Below the navigation bar, there's a dropdown menu labeled "Style sheet" set to "Default". Under the "Style sheet" dropdown, there's a section titled "Visibility" containing several checkboxes:

- Keep result list visible while viewing documents
- Show visualisation buttons
- Show mail button
- Use dynamic results (may slow down opening documents)
- Show print button
- Print client side  Print server side

At the bottom of the page are three buttons: "Cancel" (disabled), "Save" (highlighted in orange), and "Load Default Settings".

Options

Search | Results | File | **Global**

Style sheet **Default**

Visibility

Keep result list visible while viewing documents  
 Show visualisation buttons  
 Show mail button  
 Use dynamic results (may slow down opening documents)  
 Show print button  
 Print client side  Print server side

Cancel  Load Default Settings

### Style sheet

To change the appearance of the web client, choose another Style sheet. The style sheet is applied when you click the Save button.

### Visibility



By default, the result list remains visible while viewing documents.

To use the Visualization Module, select the checkbox Show visualization buttons.

To show the mail button, select the checkbox Show mail button.

The Use dynamic results option reloads search results each time a document is selected. This ensures that the latest documents and the field data are always shown. This is useful for indexes that are constantly being updated but you may notice that for large results lists documents open more slowly.

To show the print button, select the checkbox Show print button.

Choose 'Print client side' or 'Print server side'.

Client side printing allows you to add a selection of Document key fields (and their values) and/or Document properties to a page preceding the print output.

For more information, see Print Service for the Web Client.



# Document Basket

The document basket lets you collect documents from results lists so you can do various batch processes on them. The option buttons have the following actions:

- Toggle between selecting and deselecting all documents shown. You can also select individual documents by clicking the selection box.
- Download the selected documents. First, define the Download format at the bottom of the dialog.  
Choose from:
  - Default (..)
  - XML/Multipage TIFF
  - XML/PDF
  - Original/Single Page TIFF
- Hide/Show all fields in the results list. Only the basic columns are displayed for clarity.
- Print selected documents. Enabled by the Show print button option on the *Global Options* (page [64](#)) page.
- Edit document field values of selected documents. Note that you cannot search on the changes until the index has been rebuilt in ZyINDEX.
- Remove all documents from the basket.
- Remove the selected documents from the basket.
- Add selected documents to the table of contents.

To use Document Basket refer to *Using Document Basket* (page [67](#)).



## Using Document Basket

### Conditions

You have searched one or more indexes and the found documents are displayed in the results list.

### Instructions

1. Select one or more documents in the results list.
2. Click the "Put selected documents in your basket" button .
3. The documents you added to the basket are shown in a separate window. You can either close this window and continue searching and adding documents, or you can select one or more documents and do a document basket action (*Document Basket* (page [67](#))).

select	rank	hits	hitdensity	number of pages	size with images	author	subject	file name
<input type="checkbox"/>	1	0	0.00	0	4454			English - German - Italian.txt
<input type="checkbox"/>	2	0	0.00	0	4456			German - Italian - English.txt
<input type="checkbox"/>	3	0	0.00	0	4454			English - German - Italian.txt
<input type="checkbox"/>	4	0	0.00	0	4454			Copy of English - German - Italian.txt
<input type="checkbox"/>	5	0	0.00	0	1088780			Before the Mast pt 0_page_0051.tif
<input type="checkbox"/>	6	0	0.00	0	1088780			Before the Mast pt 0_page_0050.tif

### Result

You have collected documents from several results pages and performed some actions on them.

### Note

To view all collected documents again (once you have closed the dialog), click Document Basket: .



# Upload

Upload allows you to add a file to an index. When your web client has more than one index selected, the file is added to the first selected index. You can use Upload from two situations:

Directly to the selected index using the Upload button .

When the Contents tab is selected, directly to the Table of Contents in the selected index using the Upload button .

However, the functionality of the two buttons are the same: both upload to an index, and both can place the document in a Table of Contents. Note that you cannot search the document until you build the index again, but if the document is placed in a Table of Contents, you can open it from that Table of Contents.

## Hash Codes

When hash codes have been generated (see the ZyFIND manual > ZyResult/ZyView - Export Settings - Generate hash code on output), the ZIP file will also contain the hash code summary text file. This ZIP file may be uploaded to any ZyLAB Web Client, which will process the contents of the zip file whenever the "Process ZIP file contents" option is checked.

ZyLAB Web Client will process the ZIP file contents and will calculate hash codes for each file that is imported into the index, including any XML wrapper files that are present in the ZIP file. ZyLAB Web Client will scan the ZIP archive for the hash code summary text file and will match the filename of this file against the filename of the hash code summary file of the imported files. When these filenames match, this indicates that all uploaded files are authentic. The uploaded hash code summary text file will also be stored as a retrievable file in the index so that, at any time, this file can be used for authenticity verification.



## Upload a Document to an Index

### Conditions

You want to add a document to an index, with the option to place the document in a Table of Contents.

### Instructions

1. Select the index you want to upload a document to. If more than one index is selected, the index at the top of the index list will be automatically selected.
2. To upload a file directly to an index click the Upload button .
3. To upload a file from the Contents tab , select a folder in a table of contents and click the using the Upload button .
4. On the Upload file window, click Browse to locate the file.

A screenshot of a Windows Internet Explorer window titled "Legal Review - Upload file - Windows Internet Explorer provided by ZyLAB". The main title is "Upload file". Below it, the sub-section title is "Upload file to index: Acme Manufacturing Company Admin".

Select the file to upload:

Process contents of ZIP file  
 Treat uploaded content as ZyScan data

Put the uploaded file in this Table of Contents folder:

Create subfolder named:

Author

Subject

5. If you are uploading a ZIP file, select 'Process contents of ZIP file'.
6. If you want electronic documents to be saved in the electronic folder, and ZySCAN data to be saved in the appropriate tiff, xml (fields) and txt folders, select the option 'Treat uploaded contents as ZySCAN data'.  
If this option is not selected, all contents are placed in the electronic folder.



7. Select a Table of Contents folder in which to store the documents, or create a new subfolder (for example, you could use the date (yyyymmdd) for the folder name).
8. If necessary, enter data in the field(s).
9. Click Upload.
10. When the file has uploaded, the Uploaded files report screen appears. Click OK to close the screen, or use the download link to save a hash values file (refer to *Save hash codes* (page [71](#))).

### Result

You have uploaded a document or ZIP file to an index. Hash codes have been generated for the uploaded file(s). If you uploaded a ZIP file, it is extracted, and hash codes are generated for the set of documents.

You must build the index before you can search in uploaded files. Documents added to a Table of Contents folder can be opened immediately from the Table of Contents file list. If ZyALERT is installed, emails will be sent to other (members of) user groups added to the Web Client, notifying them of updates.



## Save hash codes

Hash codes can be downloaded in a text file and used to prove the authenticity of document(s).

### Conditions

You have successfully uploaded a file or ZIP file and the 'Uploaded files report' window is displayed showing information about the uploaded file(s).

rank	size	hash	file name
1	2196248	835493215B771BE058A0A422EE03DDE941A3C57C	English - German - Italian.txt
2	2196248	FED8B86F2A628806A0C4509C4B61B6592F33E9A9	German - Italian - English.txt
3	2196248	835493215B771BE058A0A422EE03DDE941A3C57C	English - German - Italian.txt
4	2196248	835493215B771BE058A0A422EE03DDE941A3C57C	Copy of English - German - Italian.txt
5	2196248	DBE64516542ADDE37316BAAA26D61A26D5235599	Before the Mast pt 0_page_0051.tif
6	2196248	24DF902DA1E02A100FA39E8411F55911F118A3D9	Before the Mast pt 0_page_0050.tif

You can [download](#) a text file containing the hash values of the uploaded files.

**OK** ▶

### Instructions

1. To view the hash number and file path click on 'download'. The information appears in a new window.
2. To download a text file containing the hash information Click with the right mouse button on 'download' and select Save Target As. Browse for the correct location to save the .txt file with the hash codes. Click Save.

### Result

You have viewed or downloaded the hash codes.



# Server Side Printing

## Conditions

You want to print a document you have found on a printer connected to the server. You can print it by selecting it from the found documents list, or when you have already opened it. The ZyLAB TIFF Export Printer is installed and the ZyLAB Print Service is running.

## Instructions

1. If you cannot see the print icon  click the *Show print button (print server side)* on the *Global Options* (page [64](#)) page.
2. To print click on the print icon . The *Printer Options* window appears.
3. If necessary, set-up the printer:



- a) Click on the *Add/remove printers* tab.

The screenshot shows the 'Printer Options' window with the 'Add/remove printers' tab selected. On the left, under 'Available Printers', there is a list of printer names: SnagIt 9, Send To OneNote 2013, Microsoft XPS Document, Fax, and Adobe PDF. In the center, there is a section titled 'Selected Printers' with an 'Edit printer name/handle:' input field and an 'Enter' button. Below this are two orange buttons with arrows: one for moving printers from the available list to the selected list, and another for moving them back. At the bottom left, a red message says 'Retrieving available printers. Please wait...'. At the bottom right, there are 'Refresh' and 'Save' buttons, along with a checkbox for 'Select as default printer'.

- b) From the list of printers, select the printers you want to use for printing. Transfer them to the Selected Printers panel using the > button.
- c) If you want to give the printer a user-friendly name, select the printer and type the name in the *Edit printer name/handle* box. Click *Enter* to change the printer's name.
- d) Choose a printer to select as the default printer.
- e) Press *Refresh* to see your changes.
- f) Press *Save*



4. Click the *Print setup* tab to show the print window.

**Printer Options**

Print setup Add/remove printers

Number of documents selected: 1

Document	Printer
<input checked="" type="checkbox"/> Banner page <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Images or WYSIWYG <input type="checkbox"/> Text  Pages <input type="text"/> to <input type="text"/> (leave empty to print all pages)	Printer <input type="button" value="▼"/>

Layout	Finishing
Paper size <input type="button" value="A4 ▾"/> Orientation <input type="button" value="Portrait ▾"/> Binding <input type="button" value="Long edge ▾"/>	Copies <input type="text" value="1"/> Multiple copies <input type="button" value="By document (collate) ▾"/> 1-sided or 2-sided <input type="button" value="2-sided ▾"/>

5. Press the *Refresh* button to show all changes you have made to printers.
6. In the *Printer* box, select a printer.
7. In the Document, Layout and Finishing boxes choose the required settings.
8. Click *Print* to print the document.

## Result

You have printed the (selected) document.

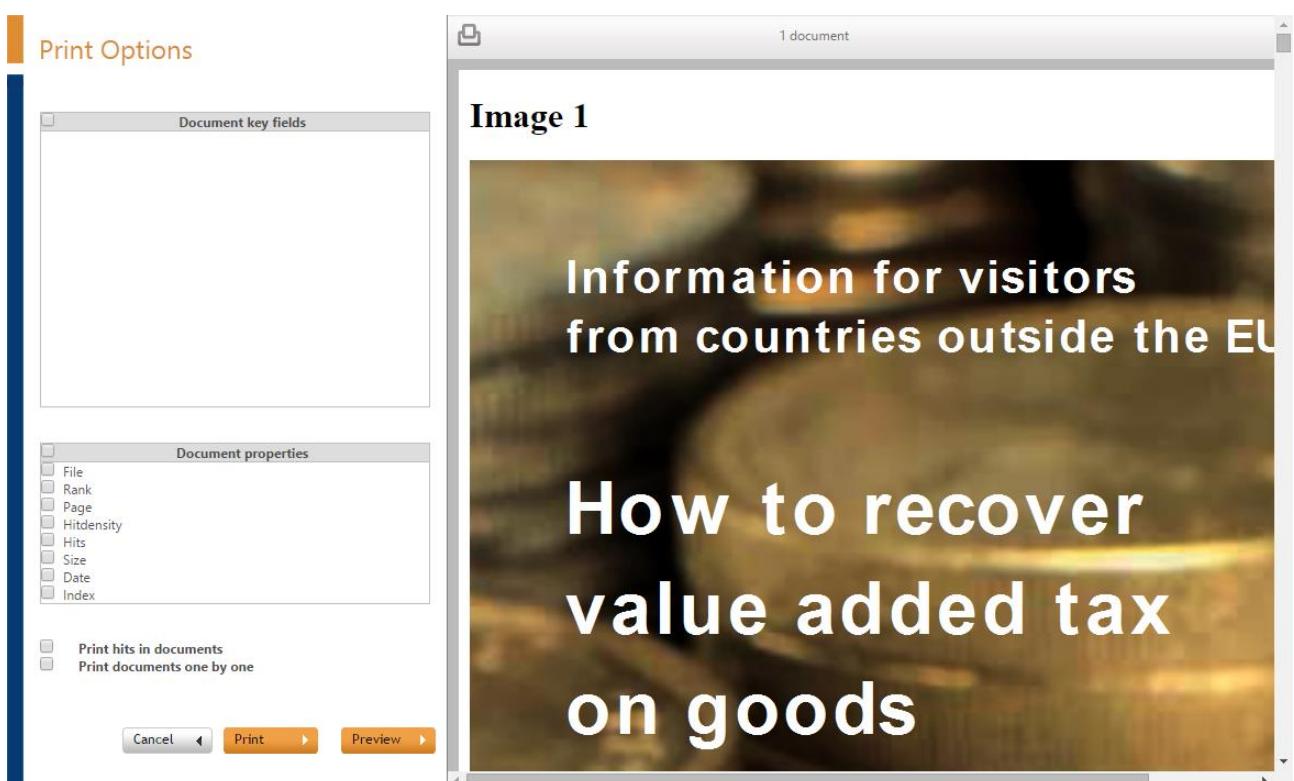
# Client Side Printing

## Conditions

You want to print a document you have found on a printer connected to your PC. You can either print it by selecting it from the found documents list, when you have already opened it, from the result list for batches, or from the document basket.

## Instructions

1. If you cannot see the print icon click the *Show print button (print client side)* on the *Global Options* (page 64) page.
2. To print click on the print icon . The *Print Options* window appears.



3. Select the Document key fields and/or Document properties you want to print.
4. Define if you want to
  - Print hits in documents
  - Print documents one by one

You will have one print job per document, instead of one print job for all documents.



5. Click the Preview button to view the page that will precede your printed document.
6. Click Print.



# Help Menu

The Help menu access the following:

**Help Contents**

Opens the ZyLAB Web Client for Users Manual.

**Support by ZyLAB**

Opens the ZyLAB support page containing information about how to contact ZyLAB.

**Contact Us**

Opens the ZyLAB.com website on the Offices page showing the contact details for all the ZyLAB offices.

**ZyLAB on the Web**

Opens the ZyLAB homepage.