



ASG

Mobius Luminist™ **User's Guide**

Version 5.1.1

Publication Number: MDL0200-511

Publication Date: March 2016

The information contained herein is the confidential and proprietary information of Allen Systems Group, Inc. Unauthorized use of this information and disclosure to third parties is expressly prohibited. This technical publication may not be reproduced in whole or in part, by any means, without the express written consent of Allen Systems Group, Inc.

Copyright © 2016 Allen Systems Group, Inc. All rights reserved.
All names and products contained herein are the trademarks or registered trademarks of their respective holders.

ASG Worldwide Headquarters Naples Florida USA | asg.com | info@asg.com
708 Goodlette Road North, Naples, Florida 34102 USA Tel: 239.435.2200 Fax: 239.263.3692 Toll Free: 800.932.5536 (USA only)

Contents

Preface	iii
About this Publication	iii
Related Publications	iv
Publication Conventions	iv
Worldwide Customer Support	v
Intelligent Support Portal (ISP)	vi
Product Support Policy	vi
ASG Documentation/Product Enhancements	vii
Chapter 1: Getting Started	1
Quick Start	1
Accessing Luminist	8
How Luminist Interacts with ViewDirect Systems	9
Display Components	9
Masthead	10
Navigation Pane	10
Document Viewer	11
Optional Home Screen	12
Chapter 2: Accessing and Viewing Content	13
Logging in to Luminist	13
Selecting and Connecting to a Repository	14
Browsing Documents	14
General Browsing	15
List Filtering and the Locate Function	16
Associated Content: Opening Documents in Other Programs	17
Viewing Next and Previous Documents	18
Viewing Documents	18
Viewing Next and Previous Pages	19
Zooming and Rotating Documents	19
Viewing in Full-screen Mode	20
Finding Text within Documents	20
Closing a Document	21

Searching for Documents	21
Simple Search	21
Constructing a Search	24
Navigating Search Results	25
Saving Searches and Other Common Search Functions	26
Downloading Documents	27
Printing Documents	28
Annotating Documents	29
Viewing Annotations	29
Adding Annotations	30
Modifying and Deleting Annotations	33
Extracting Data from Documents	34
Extraction Using Predefined Rules	35
Creating Extraction Rules	37
Creating Extraction Filters	40
Modifying and Deleting Extraction Filters	42
Working with Favorites	42
Accessing Favorites	43
Defining Favorites	43
Removing Favorites	45
Editing Favorites	46
Importing DocumentDirect for the Internet Personal Folders as Luminist Favorites ..	46
Logging Out and Closing Luminist	49

This *Mobius Luminist User's Guide* provides instructions for using Mobius Luminist (herein called Luminist) to search for and display ViewDirect-stored content located anywhere in the enterprise. It provides users with an easy-to-use interface that simplifies locating documents. Luminist offers simultaneous viewing of multiple diverse documents, flexible viewing options, and powerful search capabilities.

Note:

Luminist replaces ASG-DocumentDirect for the Internet in the ASG/Mobius suite of products as the browser-based client for accessing ViewDirect-stored content.

About this Publication

This publication consists of these chapters:

- [Chapter 1, "Getting Started,"](#) which provides general information about Luminist.
- [Chapter 2, "Accessing and Viewing Content,"](#) which provides detailed procedures for all the major operations available in Luminist.

Related Publications

The documentation library for Mobius Luminist consists of these publications (where *nnn* represents the product version number):

- *Mobius Luminist User's Guide* (MDL0200-*nnn*) provides instructions for using Mobius Luminist to access content.
- *Mobius Luminist Server Administrator's Guide* (MDL2100-*nnn*) describes the administrator tasks used to implement a Luminist installation.
- *Mobius Luminist Server Installation and Configuration Guide* (MDL0300-*nnn*) provides installation and configuration information.
- *Mobius Luminist Server Enhancement Summary* (MDL1000-*nnn*) provides information about new features in a release.

Note:

To obtain a specific version of a publication, contact ASG Customer Support.

Publication Conventions

ASG uses these conventions in technical publications:

Convention	Usage
Arrow (▶)	Used in a procedure to indicate commands within menus. Also used to denote a one-step procedure.
Bold	Indicates that case-sensitive usage is required for a directory, path, file, dataset, member, database, program, command, or parameter name. ▶ Verify the settings in the asg.conf file.

Convention	Usage
Capitalization	<p>For system element names, this varies according to the product interface and its operating environment.</p> <p>Mainframe file names use uppercase, for example:</p> <ul style="list-style-type: none"> ▶ Allocate a JSOPTM member in the JLRCL library. <p>Windows file names use mixed case, for example:</p> <ul style="list-style-type: none"> ▶ Create a text file named SECLIST.txt in the C:\Program Files\ASG\config directory. <p>UNIX file names use mixed case, for example:</p> <ul style="list-style-type: none"> ▶ Edit the databaseID.ACC file in the /database directory. <p>Typical product and operating system elements include:</p> <ul style="list-style-type: none"> • Directory, path, file, dataset, member, database, program, command, and parameter names. • Window, field, field group, check box, button, panel (or screen), and option labels. • Names of keys. A plus sign (+) is inserted for key combinations (e.g., Alt+Tab).
<i>lowercase italic monospace</i>	Information that you provide according to your particular situation. For example, you would replace <i>filename</i> with the actual name of the file.
Monospace	<p>Characters you must type exactly as they are shown, such as code, JCL, file listings, or command/statement syntax.</p> <p>Also used for denoting brief examples in a paragraph.</p>
<u>Underline</u>	Denotes a cursor-selectable field or line.
Vertical separator bar () with underline	Indicates options available with the default value underlined (e.g., Y <u>N</u>).

Worldwide Customer Support

ASG provides support throughout the world to resolve questions or problems regarding installation, operation, or use of our products. ASG provides all levels of support during normal business hours and emergency support during non-business hours.

You can access support information from [ASG's Support](#) page.

ASG Third-party Support. ASG provides software products that run in a number of third-party vendor environments. Support for all non-ASG products is the responsibility of the respective vendor. In the event a vendor discontinues support for a hardware and/or software product, ASG cannot be held responsible for problems arising from the use of that unsupported version.

Intelligent Support Portal (ISP)

The [ASG Intelligent Support Portal \(ISP\)](#) provides online support.

Log on to the ISP with this information:

Customer ID = *NNNNNNNNNN*

Password = *XXXXXXXXXX*

where:

NNNNNNNNNN is your customer ID supplied by ASG Product Distribution.

XXXXXXXXXX is your unique password supplied by ASG Product Distribution.

If you do not have your logon information, contact your local support center.

Severity	Meaning	Expected Support Response Time
1	Production down, critical situation	Within 30 minutes
2	Major component of product disabled	Within 2 hours
3	Problem with the product, but customer has work-around solution	Within 4 hours
4	“How-to” questions and enhancement requests	Within 4 hours

Product Support Policy

ASG fully supports the current release and one previous release of each of its products. ASG will temporarily support an older release, for up to six months, to provide time for you to upgrade.

Once programming support for a product release is withdrawn, ASG will no longer supply new fixes for problems nor accept enhancement requests for that release. When a vendor announces the end of support for system software or a hardware configuration on which ASG products rely, ASG will make a similar announcement regarding the support plans for its products. ASG's support for problems affected by system software release levels will terminate when the vendor no longer supports their hardware or software. Announcements regarding support plans for various products can be found on ASG's Web site.

ASG Documentation/Product Enhancements

Use ASG's [contact form](#) to submit your product and documentation suggestions. Ensure that you include the name of the ASG product you are using. For documentation suggestions, include the publication number located on the publication's front cover.

This chapter provides general information about Mobius Luminist. For detailed information about how to use Luminist to locate and view your content, see [Chapter 2](#), “Accessing and Viewing Content,” on page 13.

Topic	Page
Quick Start	1
Accessing Luminist	8
How Luminist Interacts with ViewDirect Systems	9
Display Components	9

Mobius Luminist replaces ASG-DocumentDirect for the Internet as the preferred method for viewing ASG/Mobius content over the Internet or your organization’s intranet. Luminist makes it easier and more efficient to retrieve and view archived content.

Quick Start

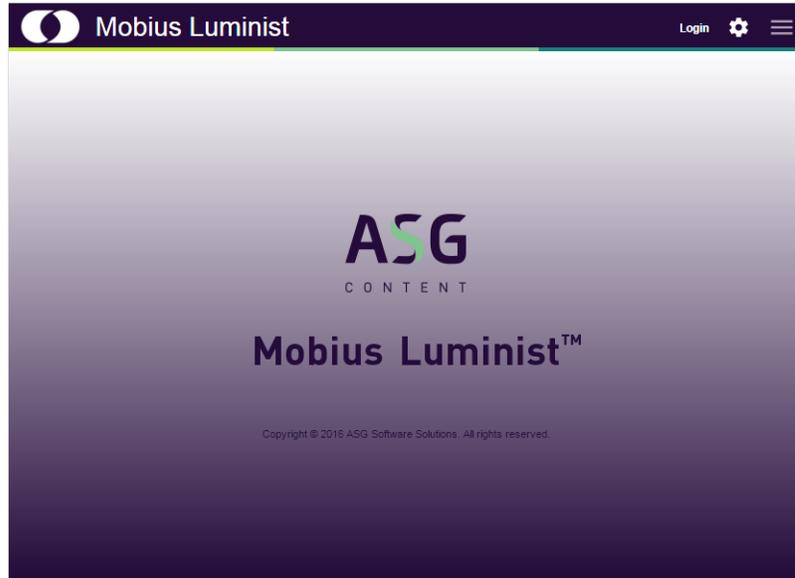
This look at major Luminist features is for new users who want a shortcut to productivity. It should be particularly useful if you have previous experience with ViewDirect repositories from other ASG/Mobius products. If you need more information about a feature, or a detailed introduction to Luminist, see other sections of this guide.

Note:

This section assumes that you can successfully enter the credentials that your system requires for logging in to Luminist and accessing content.

To take a tour of Luminist features

- 1 In your browser, enter the URL that your administrator provides for accessing Luminist. When working in Luminist, avoid using the browser’s back button, which exits the program. Luminist opens:

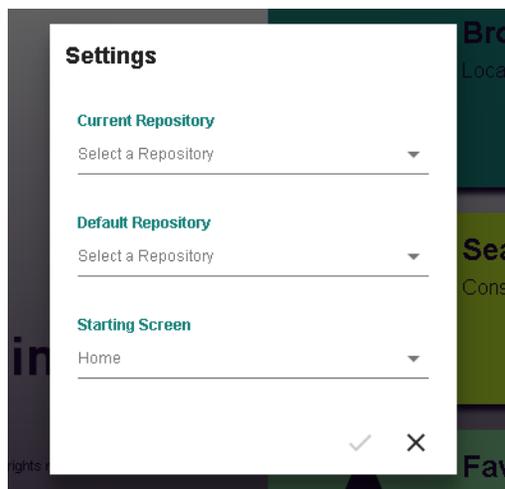


Note:

If you see a different screen after logging in, your installation may be using the enhanced Home screen. See [“Optional Home Screen” on page 12](#) for details.

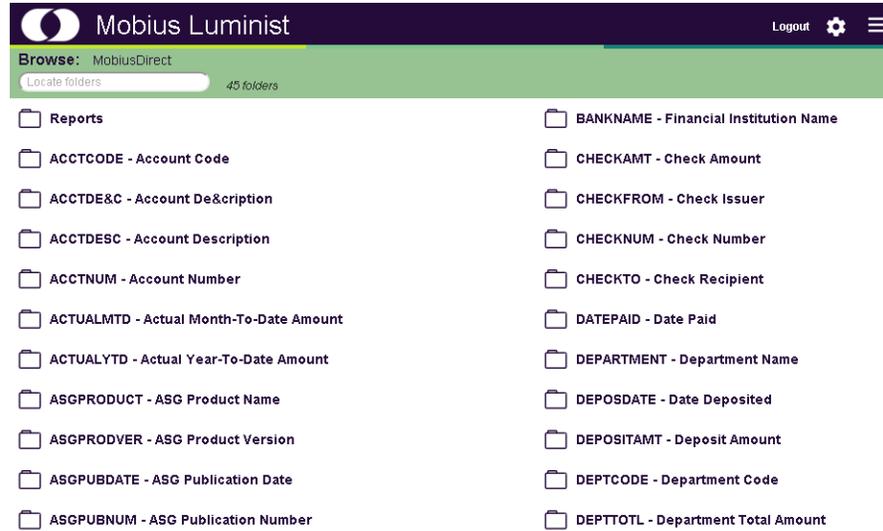
- 2 You are prompted to enter your user ID and password to connect to a repository. This will either be a default repository if one was previously specified, or the first repository in the list of available repositories.

To choose a different repository from the suggested one, click the gear icon at the top right to open the Settings dialog:



- 3 Select a repository from the Current Repository pulldown and click the check mark to close Settings. (Provide your login information if required.)

- 4 Report and/or topic indexes for the repository appear for selection. By default, Luminist is in Browse mode. The top level shows categories of information (sometimes known as “topics” or “indexes”) about the documents in the repository.



- 5 Explore Browse mode:

- a Note the filter field directly under “Browse:” and the “45 folders” next to it. Entering text here will change the folders displayed based on how closely you match their names.

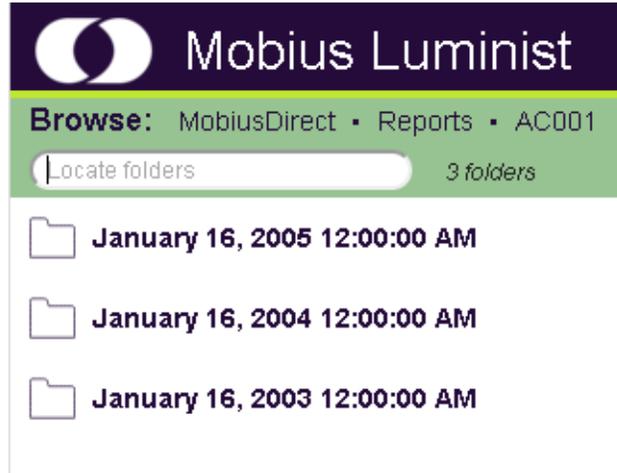
As you enter more letters or numbers in this field, the filtering becomes more specific, and the list and numeric value alongside the filter field are immediately updated. You don’t have to press the Enter key.

If you do press Enter, it immediately navigates to and/or opens the first matching item.

Note:

This same filter field is available on many list displays in Luminist, and works the same way everywhere. For example, in the results lists that are returned when you perform searches.

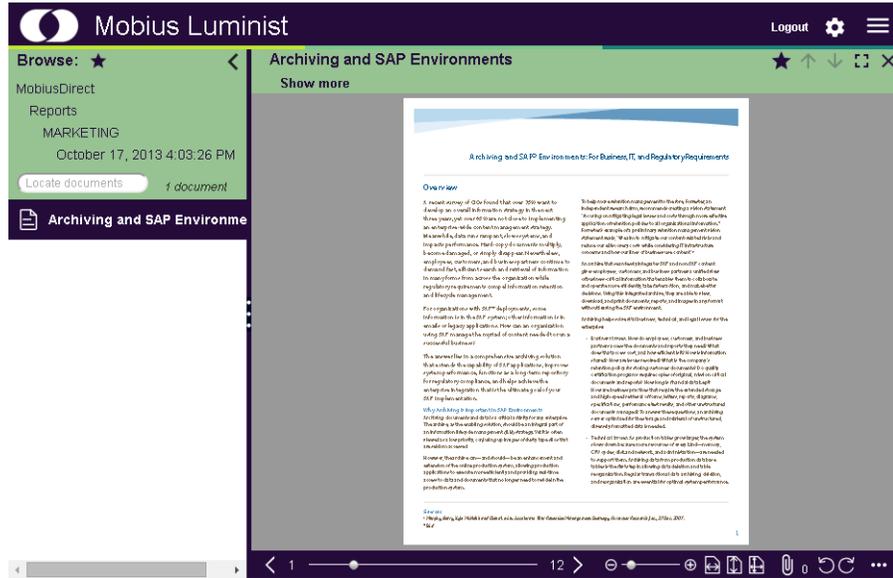
- b Click a report or topic folder. Sub-categories, that is, additional information about the chosen index, appear to help you drill down to content.
- c Drill down through sub-categories until an archived content document is displayed. As you proceed, note that a list of breadcrumbs (links) grows in the Browse display in the Navigation Pane to track your progress and make it possible to quickly return to a higher level.



- d Click a breadcrumb appearing next to “Browse:” to move up one or more levels.
- e Work your way down to the lowest level, which represents documents. Hover over a document name and observe the options; View, Print, Download, Extract and Filter, and Favorite. The default action is View.

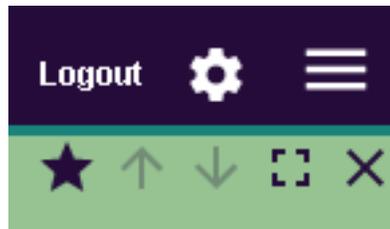


- f Select View to open a document. It appears in the Document Viewer on the right, and the folder hierarchy breadcrumbs move to the Navigation Pane.



g At the top of the Document Viewer, try out the controls that enable you to designate a favorite, browse up and down through related items (usually equivalent document sections) in the Navigation Pane, view the item in full screen mode, and exit the item, automatically moving up one level.

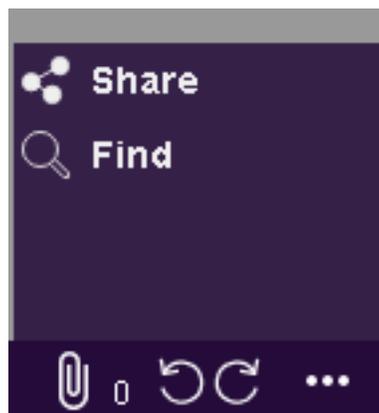
But don't click **Logout** yet.



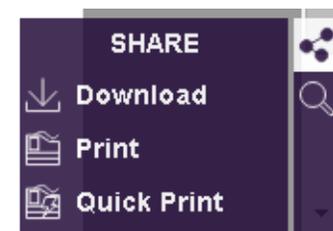
h At the bottom of the Document Viewer, try out the controls that enable you to page through a multi-page document, zoom in and out, impose assorted page fitting on the view, see any annotations associated with the document, and rotate the view.



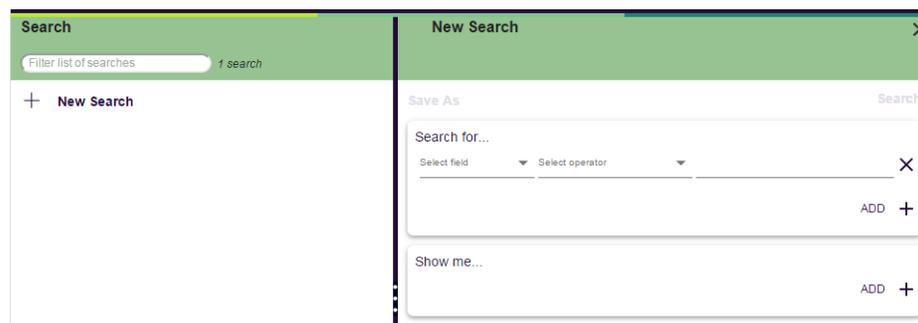
i Click the menu icon at the right side of the bottom of the Document Viewer. **Find** is for searching for text within the displayed document.



Share leads to a sub-menu that enables you to download, print, or quick print.



- 6 At the top of Luminist, click the menu at the right and select **Search**. Luminist is now in Search mode. In the Search display, **Search for** controls are for defining search parameters, and **Show me** controls for determining how results are presented.



- 7 Explore Search mode:
 - a In **Search for**, click the down arrow next to **Select field** and select an index for the search. Note that by scrolling down you can also select built-in indexing items.
 - b Use the same technique to select an operator and value for the search. Make sure that your Search for expression will produce results.

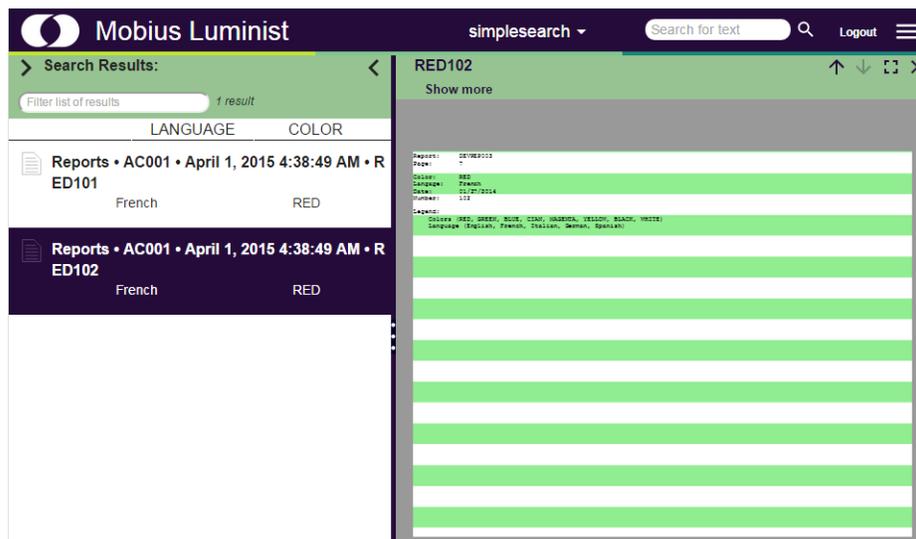
- c Click **Add** and create another expression for the search. Multiple expressions, like the two in this search, are handled with AND logic, so that the items you search need must meet *all* conditions.
- d In **Show me**, select fields to display, and specify how they are sorted. Note that multiple conditions here are also ANDed, so they *all* must be satisfied to produce results.

The image shows two configuration panels. The top panel, titled "Search for...", contains two search criteria: "LANGUAGE" with the operator "Is Equal To" and value "French", and "COLOR" with the operator "Is Like" and value "red". Each criterion has a close button (X) and an "ADD +" button at the bottom right. The bottom panel, titled "Show me...", contains two sorting criteria: "LANGUAGE" with the operator "Do Not Sort" and a sort direction icon (up/down arrow), and "COLOR" with the operator "Do Not Sort" and a sort direction icon. Each criterion has a close button (X) and an "ADD +" button at the bottom right.

- e Click **Search**. If the search is successful, a results list appears.

The image shows a split-screen interface. On the left, the "New Search" panel is visible, containing the same search and show me configuration as in the previous image. On the right, the "Search Results:" panel is displayed, showing a filter list of results with "2 results". Below the filter list is a table with two columns: "LANGUAGE" and "COLOR". The table contains two rows of results, both for "Reports • AC001 • April 1, 2015 4:38:49 AM • RED101" and "Reports • AC001 • April 1, 2015 4:38:49 AM • RED102". The first row shows "French" under LANGUAGE and "RED" under COLOR. The second row shows "French" under LANGUAGE and "RED" under COLOR.

- f Click one of the results and the referenced document is displayed. When the document is displayed on the right, the results list moves to the Navigation Pane on the left.



Arrows on either side of the displayed result number enable you to scroll through any additional results.

8 Now you can click **Logout** to exit Luminist.

For more detail on all of these Luminist operations, see [Chapter 2, “Accessing and Viewing Content,”](#) on page 13. That chapter also describes other significant Luminist features not demonstrated here, including:

- [“Annotating Documents”](#) on page 29
- [“Extracting Data from Documents”](#) on page 34
- [“Working with Favorites”](#) on page 42

Accessing Luminist

Luminist is supported on major Web browsers including Google Chrome, Microsoft Internet Explorer, Microsoft Edge, and Mozilla Firefox. Your system administrator can provide you with the correct link (URL) to access Luminist and access your documents. By default, it is typically similar to this:

```
http://<host system>:<port number>/luminist/luminist.html
```

For more details, see [“Logging in to Luminist”](#) on page 13.

How Luminist Interacts with ViewDirect Systems

Luminist provides access to documents archived in ASG/Mobius ViewDirect repositories, hosted by either ASG-ViewDirect-MVS or ASG-ViewDirect for Networks. Luminist allows you to find your documents either by browsing through the folder hierarchy or by performing searches.

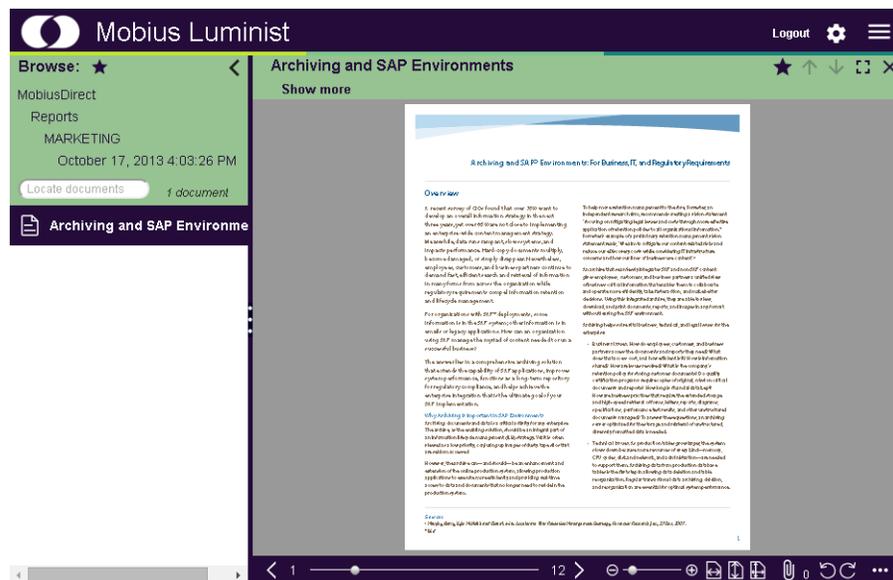
When you locate and select a desired document, Luminist displays it in the Document Viewer. Once a document is open, there is no delay in changing the display to view different document pages or modifying display characteristics such as magnification or rotation. Switching to viewing other documents in the same folder is also immediate. Printing your documents, or downloading them as PDF files, is fast and simple. You can also switch between Search mode, Browse mode, and Favorites mode while keeping active displays retained in all.

Display Components

This section explains the parts of the Luminist display and provides general guidelines for how archived content is organized.

The Luminist display consists of three main parts, as shown below:

- **Masthead** at the top.
- **Navigation Pane** on the left side.
- **Document Viewer** on the right side, making up the largest portion of the display.



Notes:

- There is an optional Home screen that is not enabled by default. If your installation uses this screen, see [“Optional Home Screen” on page 12](#) for information.
 - You can resize the Document Viewer and Navigation Pane by selecting and dragging the border between them.
 - When the Document Viewer is not open, the Navigation Pane can fill the entire Luminist display.
-

Masthead

The Masthead includes:

- **Search field** for performing simple searches. See [“Simple Search” on page 21](#) for details.

Note:

The Masthead search field only appears when you are connected to a repository that supports simple search or full text search.

- **Logout control**, for exiting Luminist. (This control may not appear if your installation is using single sign-on authentication.)
- **Settings menu** to control your repository access.
 - Choose the repository you want to use from the Current Repository pulldown.
 - Select a repository under Default Repository, so you won't have select one each time you log on.
 - Bypass the standard starting screen each time you log in and start in Browse, Search, or Favorites mode.
- **Menu** (three stacked horizontal lines) at the right end, for choosing either Browse, Search, or Favorites mode.

Navigation Pane

The Navigation Pane is where you conduct searches and browsing until you reach a desired document, which immediately opens in the Document Viewer.

- At the top, directly below the Mobius logo, Luminist always displays the mode you are working in: Browse, Search, or Favorites.
- The folder hierarchy leading to the document is shown as a series of indented links above the open document name itself in the Navigation Pane.

Note:

When you are in Search mode, the Navigation Pane contains the search dialog or search results list in place of the folder hierarchy.

- If the open document is one section of a multi-section report, the other sections are listed at the same level as the open document.
- If there are multiple pages of folders or documents in the list, you can navigate them with the arrows next to the filter field.
- Clicking the left chevron at the top (<) collapses the Navigation Pane and enlarges the Document Viewer. Clicking the right chevron (>) restores the Navigation Pane.

Document Viewer

The Document Viewer consists of three parts:

- **Display area** in the center, where the document appears.
- **Upper control area**, where you can view document information and metadata above the document by clicking **Show more** on the left. Controls on the right allow you to change the display to scroll through other instances of the same report section, select full screen display, or close the document.
- **Lower control area**, for paging through the document, and enlarging and rotating it. Display of annotations and text notes are toggled on and off here. There is also a menu (...) for accessing more document-related functions like print, download, text-search, etc.

For more details on the operation of these controls, see [“Viewing Documents” on page 18](#).

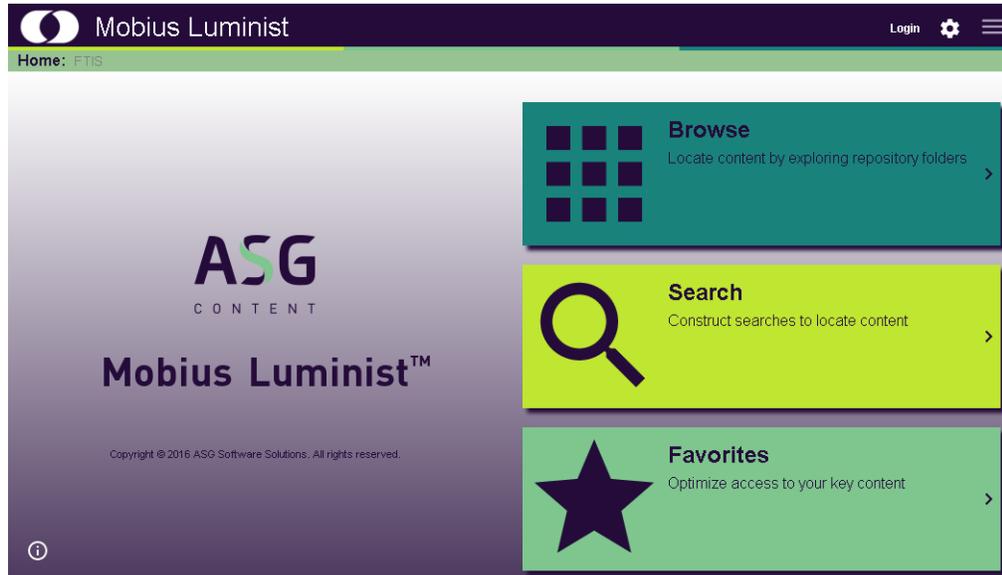
The Luminist Document Viewer takes advantage of browser features like full-screen mode, allowing you to enlarge the document page to occupy the entire screen. You can also use standard keyboard functions – like page up and page down – to page through the document. For users with touch-screen displays, the document viewer responds to swipes and taps, allowing you to operate on your document using gestures.

Note:

The Document Viewer does not allow scrolling from one document to the next (i.e., does not allow scrolling across section boundaries). You can scroll among the pages within a single document (section), but in order to go to another document, you must either use the next/previous document functions in the upper control area, or select a different document in the Navigation Pane.

Optional Home Screen

If your administrator has enabled it, you will see this screen when you log into Luminist:



On the Home screen:

- Click the Browse, Search, or Favorites links to access the features of the different Luminist operating modes.
- Click the circled i at the lower left for version and copyright information about the installed version of Luminist.

Note:

When the Home screen is enabled, Home appears as an additional choice on the top right Masthead menu along with Browse, Search, and Favorites.

2

Accessing and Viewing Content

This chapter provides details on commonly used Luminist procedures.

Topic	Page
Logging in to Luminist	13
Selecting and Connecting to a Repository	14
Browsing Documents	14
Viewing Documents	18
Searching for Documents	21
Downloading Documents	27
Printing Documents	28
Annotating Documents	29
Extracting Data from Documents	34
Working with Favorites	42
Logging Out and Closing Luminist	49

For general information about Luminist, see [“Getting Started” on page 1](#).

Logging in to Luminist

After entering the URL for your installation’s Luminist Server system in your web browser as described in [“Accessing Luminist” on page 8](#), you may be presented with a login dialog. (If your administrator has implemented the single sign-on protocol, you may not be required to log in explicitly.)

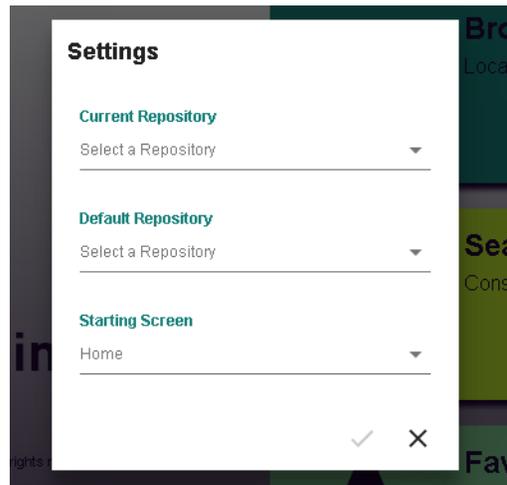
Your unique ID and password identify you as a Luminist recipient and provide access to documents available to you. The Recipient ID controls a variety of security privileges, for example, what reports and/or sections you may view, and whether you are allowed to create and modify content. After entering your login credentials, you typically have access to all repositories to which you are authorized. (The details of which repositories you can see are controlled by your administrator.)

Selecting and Connecting to a Repository

You may be directed to a default repository when logging in, but if your administrator has enabled it, you can choose to connect to a different repository.

To connect to a repository

- 1 Click Settings (the gear icon) on the Masthead at the top of Luminist display. The Settings dialog opens:



- 2 Select the repository from the Current Repository pulldown.

Note:

You can also set a repository under Default Repository to be your standard repository whenever you log into Luminist.

- 3 If you are prompted for your recipient ID and password, provide them. (If your administrator has implemented the single sign-on access protocol, this won't be necessary: your previous entry applies to all repositories to which you have access.)

The usual display after connecting is a “Reports” folder containing all archived reports, followed by a series of folders representing everything you can browse in the repository.

Browsing Documents

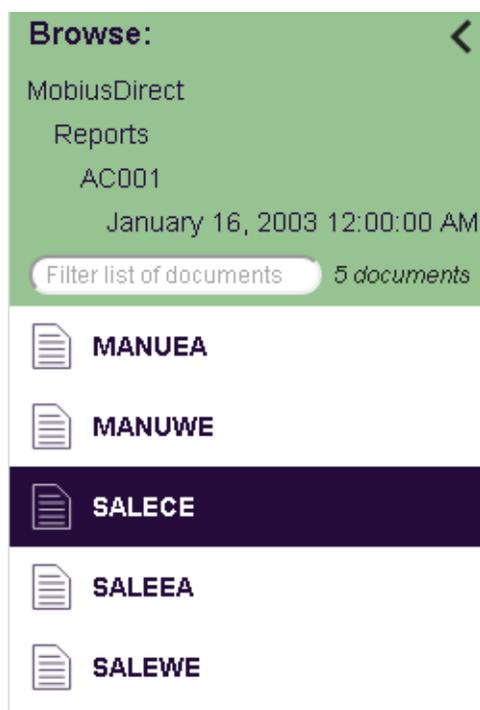
Browsing uses the folder structures of the underlying repositories. The examples herein use an ASG ViewDirect repository. But the important thing is that it is a hierarchy, and the specific structure of a given hierarchy isn't important to Luminist use.

There are several features associated with browsing documents. See the following sections:

- “General Browsing” on page 15
- “List Filtering and the Locate Function” on page 16
- “Associated Content: Opening Documents in Other Programs” on page 17

General Browsing

The Navigation Pane shown below contains the folder hierarchy display used to navigate to specific documents.



To browse the folder hierarchy to find a specific document

- 1 If you are not already in Browse mode, select **Browse** from the top-right menu. The initial display can fill the entire display—it moves to the Navigation Pane when you drill down into the folder hierarchy and open a document.

The top level displayed is the repository. The next level typically displays folder icons for all topic indexes available in different categories, and a “Reports” folder containing all the available report archives.

- 2 Continue selecting the sub-category folders until you reach the lowest level, a folder that contains one or more documents.

Note:

You can also enter text in the filter field to narrow the list of folders or documents displayed. This works instantly, dynamically changing the displayed list as you type. Pressing the Enter key will immediately navigate to the best matched item currently displayed.

See [“List Filtering and the Locate Function” on page 16](#) for additional information.

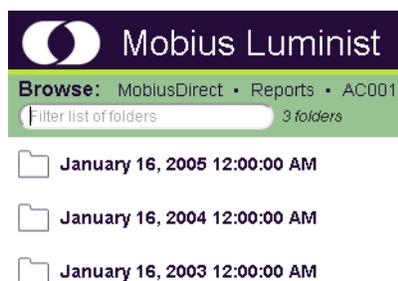
- 3 Select one and click it. The document opens in the Document Viewer. If it is a multiple-page document, it displays the first page.

Notes:

- Viewing the document is the default action when clicking it, but while your mouse is hovering, you can alternatively select **Print**, **Download**, or **Extract and Filter**. See [“Printing Documents” on page 28](#), [“Downloading Documents” on page 27](#), and [“Extracting Data from Documents” on page 34](#) for details.
 - Do *not* use your browser's Back button to go up the folder hierarchy. The Back button closes Luminist.
 - You can use the indented links in the Navigation Pane to return to the higher folder hierarchy levels and locate other documents.
-

List Filtering and the Locate Function

As already mentioned, the filter field that appears above the lists in the Navigation Pane is used to narrow the number of items displayed.



Entering text in this field filters the list below to only show matching items. The filtering works as a prefix, starting at the left side of the text. The field is dynamic and modifies the list as you enter text, which makes the matching more precise as you continue typing. For example:

Entering “we” limits the display to items beginning with “we”

Continuing to “week” limits the display to items beginning with “week”

Continuing to “weekly” limits the display to items beginning with “weekly”

Luminist does *not* wait for the Enter key to be pressed to filter the list. The italic text to the right of the field displaying the number of matched items is also immediately updated as the number of matches changes.

Notes:

- Your system administrator controls how filtering and the locate function work at your installation. This section describes the defaults.

For example, you can have your administrator enable the list filtering feature to filter text that appears in the middle of a string and not just the beginning.
 - This feature also works in search results lists appearing in the main portion of the Luminist display. It functions the same way there as it does in the Navigation Pane.
-

Filter Field Locate Function

A further use for the filter field is to quickly locate content by pressing the Enter key:

- Entering letters or numbers here and pressing the Enter key goes directly to the first matching instance on the displayed list.
- Pressing Enter without first entering any characters goes directly to the first item on the displayed list.
- You can use this method to quickly navigate down the hierarchy, pressing Enter as each new level is reached to display the next level.
- This field always has the initial focus whenever the Navigation Pane is first displayed in order to immediately provide this locating method.

Associated Content: Opening Documents in Other Programs

Luminist supports viewing and downloading *associated content*, which refers to archived documents tied to a specific application, like Microsoft Word or Excel. These documents open in their associated applications within the Luminist Document Viewer.

In order for this work as expected, the correct application must be installed on the computer where you’re viewing the content. There may also be additional definitions or specifications required, depending on the computer type, operating system, and browser you are using. Your Luminist administrator can help you if you receive an error message when attempting to open associated content and its required application isn’t found.

Notes:

- Downloading associated content always returns the data in a zip file, regardless of the application with which it is associated.
 - Printing of associated content is not handled natively by Luminist; instead, you must view or download the document, and then print it using the external application for that content type.
-

Viewing Next and Previous Documents

After you open a document in the Document Viewer, if there are other documents available in the same folder (for instance, other sections of the same report)—they appear at the same indent in the lower portion of the Navigation Pane—you can move between them in two ways:

- In the Navigation Pane, select them with the mouse.
- In the Document Viewer, click the Up/Previous and Down/Next arrow icons at the top right.

Unless documents are exceptionally large and complex, they are immediately displayed in the Document Viewer when selected.

Note:

The Document Viewer does not allow scrolling from one document to the next (i.e., scrolling across section boundaries). You can scroll among the pages within a single document (section), but in order to go to another document, you must either use the next/previous document functions in the upper control area, or select a different document in the Navigation Pane.

Viewing Documents

Once you have a document open in the Document Viewer, you use the controls at the bottom to modify the view. For details, see:

- [“Viewing Next and Previous Pages” on page 19](#)
- [“Zooming and Rotating Documents” on page 19](#)
- [“Viewing in Full-screen Mode” on page 20](#)
- [“Finding Text within Documents” on page 20](#)

Viewing Next and Previous Pages

When a multi-page document is displayed in the Document Viewer, you use the < and > icons and the slider between them at the bottom left to move between pages.

- Clicking > moves forward one page.
- Clicking < moves backwards one page.
- Grabbing and moving the circle on the slider goes to the page whose position in the document archive is indicated by that position. The field above the circle on the slider displays the page number.
- Entering a page number into the page field above the circle on the slider and pressing the Enter key goes directly to that page.
- Clicking on “1” in the page number field goes directly to the first page. Similarly, clicking on the last number displayed in the page number field goes directly to the last page.
- You can also use the Page Up and Page Down keyboard keys to move between pages one page at a time.

Zooming and Rotating Documents

To change the size of a displayed document, use the – and + icons and the slider between them at the bottom right.

- Clicking – (minus sign) reduces the document display on each click. The step sequence is 400%, 300%, 200%, 150%, 100%, 75%, 50%, and 25%. (Keyboard equivalent: Ctrl+Alt–)
- Clicking + (plus sign) enlarges the document display on each click. The step sequence is 25%, 50%, 75%, 100%, 150%, 200%, 300%, and 400%. (Keyboard equivalent: Ctrl+Alt+)
- Grabbing and moving the circle on the slider allows you to zoom the document size as desired. The field above the circle on the slider displays the percentage of magnification or reduction.
- Entering a numeric value into the percentage field above the circle on the slider and pressing the Enter key sets that magnification value.
- The three icons to the right of the slider do the following:
 - Fit the document to the Document Viewer window width. (Keyboard equivalent: Ctrl+2)
 - Fit the document to the Document Viewer window height. (Keyboard equivalent: Ctrl+3)
 - Fit an entire page in the Document Viewer window. (Keyboard equivalent: Ctrl+1)

Should you need to rotate the display (for example, if some archived pages are in landscape format and can't be easily read), use the icons to the right of the zoom controls:

- The left-facing arrow rotates the display left 90% on each click. (Keyboard equivalent: Ctrl+L)
- The right-facing arrow rotates the display right 90% on each click. (Keyboard equivalent: Ctrl+R)

Viewing in Full-screen Mode

Controls at the upper right include a full-screen button:

- Clicking the full-screen button expands the Document Viewer display to the entire screen.
- Pressing the Escape key in full-screen mode returns the Document Viewer to its previous size.

Notes:

- Clicking any control in the upper control area also exits full-screen mode.
 - The zoom level does not change when going to or from full-screen mode.
-

Finding Text within Documents

Use the find function to locate text in the displayed document.

To search for text within an open document

- 1 Click the menu at the lower right of the Document Viewer. (Keyboard equivalent: Ctrl+M)
- 2 Select **Find**.
- 3 A find box appears at the upper right of the Document Viewer. Enter the text that you wish to find in the search field and press Enter. The first instance found in the document is highlighted.
- 4 Use the up and down arrow icons in the find box to move through all instances.
- 5 When finished, click the X icon to close the find box.

Notes:

- Find operations can span pages, so if the text is not found on the current document page, the display changes to the next document page where the text is present. (Or the reverse, if you are navigating previous hits with the up arrow.)

- Find occurs only within the pages of this single document. It does not find text that resides outside the current document (i.e., current section).
 - All instances of the found text are highlighted, but the “current” hit is shown with a stronger/bolder outline.
-

Closing a Document

To close an open document, click the X in the top-right controls. This closes the Document Viewer, and the Navigation Pane expands to the full width of the Luminist window.

Searching for Documents

This section explains how you construct powerful searches for finding content, and avoid working your way down the folder hierarchy. There are two different kinds of searches, simple search and full-feature search. For details, see:

- [“Simple Search” on page 21](#)
- [“Constructing a Search” on page 24](#)
- [“Navigating Search Results” on page 25](#)
- [“Saving Searches and Other Common Search Functions” on page 26](#)

Simple Search

Simple searches are typically basic searches of the *document metadata* in the current repository. They are useful for quickly finding documents based on their topic, report, or section names when you don’t want to construct a full-feature search. You perform simple searches from the Search field in the Luminist Masthead.

Notes: _____

- The Masthead Search field only appears if you are connected to a repository that supports simple search or full text search.
 - When you are connected to a repository that supports full text search, simple searches also scan the contents of documents, not just their metadata.
-

To run a simple search

- 1 Make sure that you are in the correct repository to perform the desired search. (See [“Selecting and Connecting to a Repository” on page 14](#) for details.)

- 2 Enter the folder name—more specifically, a topic, report, or section name—associated with the desired document in the Search field.



Notes:

- How the documents in your repository are organized, that is, how the metadata is used to classify the documents into folders based on topics or sections (or other criteria), will determine what you enter when you search.
 - This is less important if you are searching in a repository that supports full text search, as the entire contents of documents are scanned, not just their metadata.
-

For example, if your document is flagged as being in the French language with the topic “French”, and you enter “French” in the Search field and press Enter, you might get results like this:



Found documents are listed with the search term highlighted. Sometimes snippets of content from within the documents are also shown:

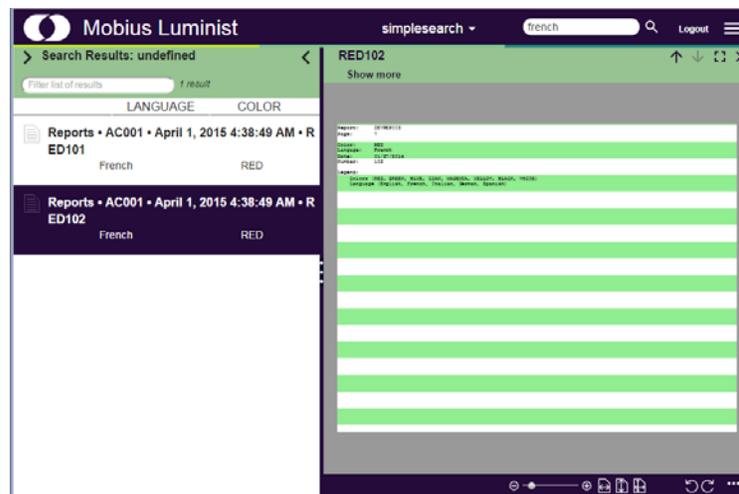
Filter list of results 145 results		
CHAPTER ▲	REPORT_ID	VERSION_ID
 Reports • AC001 • July 17, 2015 3:02:50 PM • CHAPTER),	ReportID: AC001 SectionID: CHAPTER), CHAPTER: CHAPTER),	CHAPTER), AC001 July 17, 2015 3:02:50 PM
 Reports • AC001 • July 17, 2015 3:02:50 PM • CHAPTER--	ReportID: AC001 SectionID: CHAPTER-- CHAPTER: CHAPTER-- Text: ANNIHILATION U THE V AN WHO BLEEDS TO DEATH , FOR C TO STAUNCH IT ; SO , AFTER SORE OF BUT GRAT NAH , HIM FROM THE SEA AND THE WHALE YOU TO BE COPIED FOR HIS SIN B	CHAPTER-- AC001 July 17, 2015 3:02:50 PM
 Reports • AC001 • July 17, 2015 3:02:50 PM • CHAPTER.	ReportID: AC001 SectionID: CHAPTER. CHAPTER: CHAPTER. Text: THE CROTCH ALLUDED TICK OF A PEC IS PERPENDICULARLY INSERTED IN FOR FROM ITS REST AS THE WALI CTIVELY CALLED THE FIRST BUT THESE TWO HARPOONS	CHAPTER. AC001 July 17, 2015 3:02:50 PM
 Reports • AC001 • July 17, 2015 3:02:50 PM • CHAPTER1.	ReportID: AC001 SectionID: CHAPTER1. CHAPTER: CHAPTER1. Text: GAMESOMENESS IS N OOD GALLON OF G EXTRACTED FROM HIS JAWS IS EXC JEWELLERS AND INVARIABL WAYS LIVE LUCKY OMEN . IF YOU YOURSELF CA THESE VIVACIOUS FISH , THEN HEA	CHAPTER1. AC001 July 17, 2015 3:02:50 PM

These snippets are displayed when full text search support is present in the repository. Also in this case, note the arrow next to “CHAPTER”: you can sort the results list in ascending or descending order based on any column value, just by clicking the column label.

Note:

If more results are found than can fit in the results list display, arrows appear on either side of the number of results to move forwards and backwards through pages in the list.

3 Clicking on an entry in the results list opens the associated document:



- 4 If multiple documents have been found, you can use the up and down arrows at the top right of the Document Viewer to move between them.

Constructing a Search

Use the procedure below to create a full-feature search.

Note:

You can also reuse a previously saved search. See [“Saving Searches and Other Common Search Functions”](#) on page 26.

To create and execute a search

- 1 Click the menu at the top right of the Masthead and select **Search**. Click **New Search** (or the **Create** link under it) to open a blank search:

The screenshot shows a 'New Search' dialog box. At the top is a green bar with the text 'New Search' and a close button 'X'. Below this bar, there are two main sections. The first section is titled 'Search for...' and contains a 'Save As...' link on the left and a 'Search' link on the right. It features a search input field with a placeholder 'Search for...'. Below the input field are two dropdown menus: 'Select field' and 'Select operator'. To the right of the input field is a close button 'X'. Below the input field is an 'ADD +' button. The second section is titled 'Show me...' and has an 'ADD +' button to its right.

- 2 Fill in the **Search for...** fields:
 - a The Select field pulldown includes the topic indexes available to search, as well as some report information fields. Select one.
 - b The Select operator pulldown includes standard operators like Is Equal To, Is Not Equal To, Is Greater Than Or Equal To, Is Between, etc. Select one.
 - c The Enter value field has no pulldown, you must manually enter text or numbers. Enter the value (e.g., name, social security number, phone number, city, etc.) that you wish to find here.
 - d Click **ADD +** to enter additional values to narrow your search.

Notes:

- If you are specifying multiple search criteria, they *all* must be satisfied for matches to be found. That is, Luminist search processing uses Boolean AND logic rather than OR.
 - You can always revert to the previous state of a search (i.e., as when last saved, or blank if a new search) by clicking **Undo** in the Search options.
 - Your search criteria must contain at least one topic index to be searched.
-

3 Fill in the **Show me...** fields:

- a** The first field starts by replicating the topic you entered in the Select field pulldown in step 1. It is also a pulldown containing the topics. Change it to the topic value you wish to see, if it is not the same.
- b** Select how you want the search results sorted in the second field. The choices are Sort Ascending, Sort Descending, and No Sort.
- c** Click **ADD +** to enter additional fields besides the first one, to increase the scope of your results.

4 Click the **Search** button at the top right to execute the search. If the search produces results, see [“Navigating Search Results” on page 25](#). If not, refine the search criteria as required.

Navigating Search Results

Search results initially appear in the right side of Luminist, in place of the Document Viewer. If there are very many results, a subset (typically 200) is displayed. You can use the filter field atop the search results list to narrow the list. Entering text in this field limits the results to items whose names contain that text. If there are more results than can fit in the display, use the arrows on either side of the displayed number of results to scroll through the results.

Note:

The appearance of search results lists may vary based on whether you are searching repositories with full text search support, and how you have constructed your searches. Sometimes there will be sortable columns and/or snippets of content visible from each document, sometimes not.

Clicking a document anywhere in the results list moves the results list to the Navigation Pane and opens the document in the Document Viewer. Clicking any entry in the list changes the Document Viewer display to show that document.

Note:

Using the Up and Down arrow keys on the keyboard here scrolls the results list, but doesn't change the document displayed in the Document Viewer.

Clicking X in the upper right when the Document Viewer is open closes that document, and search results again fill the display.

Saving Searches and Other Common Search Functions

You can save a search using the options appearing at the top of the Search display:

Save Save As... Rename... Undo changes Search

- **Save** allows you to name the current search and retain it for reuse.
- **Save As...** allows you to clone the current search and save it under a different name.
- **Rename...** allows you to rename the current search.

Note:

As mentioned elsewhere, **Undo changes** reverts the search to an earlier state, and **Search** executes the search.

After you have saved a search, moving the mouse over the name of the search in the saved searches list reveals the choices **Search**, **Edit**, and **Delete**.

Note:

Luminist includes *public searches*, which appear in all user's search lists and can be executed by anyone. However, they can only be modified by their original creators. You won't see the options to edit, rename, or delete them when you place the mouse over public searches.

Procedures for common search functions follow. See [“Constructing a Search” on page 24](#) for instructions on creating a new search.

To run an existing search

- ▶ Place the mouse over the name of the desired search in the saved searches list and click **Search**. See [“Navigating Search Results” on page 25](#) for information about dealing with located documents.

To edit an existing search

- ▶ Place the mouse over the name of the desired search in the saved searches list and click **Edit**. See [“Constructing a Search” on page 24](#) for information about setting and modifying search parameters.

To copy an existing search

- ▶ When you have a search open for editing, select **Save As**. Provide a new name and click **SAVE**.

To rename an existing search

- ▶ When you have a search open for editing, select **Rename**. Provide a new name and click **RENAME**.

To delete an existing search

- ▶ Place the mouse over the name of the desired search in the saved searches list and click **Delete**. You are asked to verify the deletion before it takes place.

Downloading Documents

The Download option in the Navigation Pane or Document Viewer allows you to download Adobe PDF files from Luminist. If you want, you can download additional file formats after extracting and filtering documents. For that type of downloading, see [“Downloading and Printing Data after Extraction and Filtering” on page 37](#).

Note:

Each PDF file downloaded is contained within a zip file.

To download a document as a PDF file

- 1 Do one of the following:
 - If the document is open in the Document Viewer, select **Share** from the menu at the lower right, then select **Download**.
 - If the document is not open, in the Navigation Pane, put the mouse over the desired document and select **Download** from the actions listed beneath the document name.

The Download window opens.

- 2 Select the Entire Document or Page Range option. If you choose Page Range, provide the starting and ending page numbers to download.
- 3 Either leave the filename as shown, or enter a new name in the File name field.
- 4 Click the down arrow icon to start the process, or click the X to close the Download window without performing the download.

Note:

Typically, downloaded zip files are automatically sent to a default location set by the browser. For example, when using Internet Explorer on Windows, something similar to:

C:\users*<username>*\Downloads

For instructions on how to selectively extract and filter data before you download it, see [“Downloading and Printing Data after Extraction and Filtering” on page 37](#).

Printing Documents

To print documents from Luminist

- 1 Do one the following:
 - If the document is open in the Document Viewer, select **Share** from the menu at the lower right, then select **Print** or **Quick Print**.
If you choose **Quick Print**, you're sent directly to the default print option window.
 - If the document is not open, in the Navigation Pane, put the mouse over the desired report archive section (i.e., the lowest level of the folder hierarchy) and select **Print** from the three actions listed beneath the document name.
- 2 Select the Entire Document or Page Range option. If you choose Page Range, provide the starting and ending page numbers to print.
- 3 Click the printer icon to start printing, or click the X to close the Printer window without printing.
- 4 Depending on your setup, you are typically automatically sent to a default print option window where you can choose the printer and other options.

Annotating Documents

With Luminist annotations, you can add commentary to a document by adding text, yellow “sticky notes”, or rubber stamps, or by highlighting selected text or page areas. Annotations are permanently associated with a location on a document page unless you, their creator, edit or delete them. You can only add and modify annotations to documents of type text, LPFD, or image.

You can also annotate using *text notes*. These are distinct from graphical annotations in that they are associated with the entire document, rather than a specific location. You can add text notes to any type of document, including video or sound files, and associated content documents viewed with an external application, such as Microsoft Word.

Additional information about the types of annotations:

- **Text.** Character strings of any length, with full control of the font, point size, etc.
- **Sticky Note.** Character strings within a yellow box resembling a Post-It note. (You can change the color from the default yellow.)
- **Rubber Stamp.** Predefined graphic icons and words (e.g., “CONFIDENTIAL”, “First Draft”) that you select from a library and place as desired.
- **Highlighter.** Akin to using a highlighter marker on printed matter—a color field that makes something on the page more visible. You control the color and opacity (transparency) of the highlighting.
- **Text Note.** Similar to text annotations, but connected to the entire document, not a specific location within it.

Viewing Annotations

The paperclip icon on the bottom control area of the Document Viewer toggles the display of annotations and text notes on and off, and provides access to the controls with which you create and edit annotations. Once annotations are associated with a page and saved, the number of annotations on the page appears alongside the paperclip icon. This number represents the page total, including both positional annotations and text notes.

When displaying annotations, the annotations bar appears at the top left of the Document Viewer. Clicking the down-arrow icon on the right side of the bar opens the full annotations list, which contains an entry for each annotation. For a document that includes many associated complex annotations, it may be easier to see them all in the list display.

Notes:

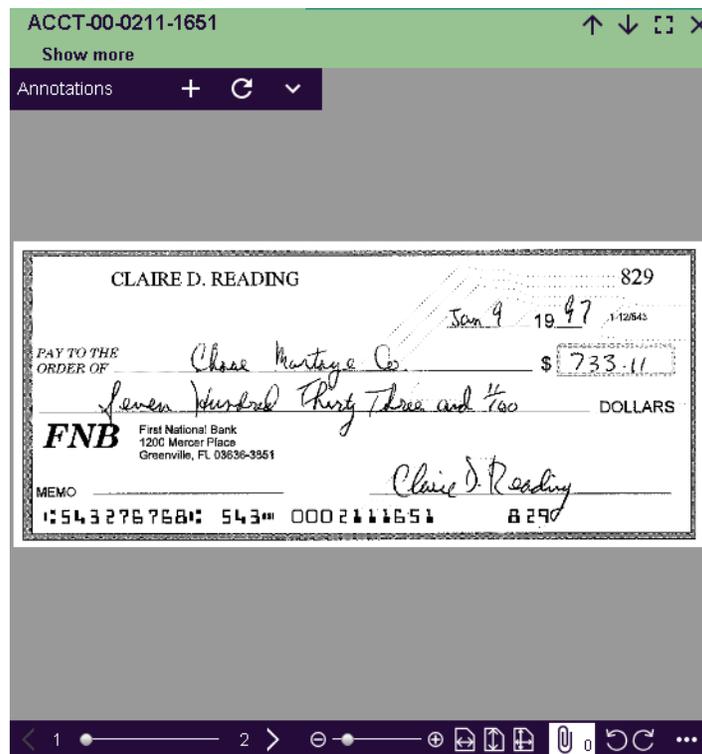
- Text notes were called *Page notes* in DocumentDirect for the Internet.
- If you previously annotated documents in DocumentDirect for the Internet, those annotations should display correctly in Luminist.

Adding Annotations

Adding annotations is similar for all types of annotations. The differences are noted at the end of the procedure.

To add annotations

- 1 Open the document in Luminist, and click the paperclip icon at the bottom of the Document Viewer. The annotations bar opens:



- The plus sign (+) allows you to add annotations, and the down arrow expands to open the annotations list, which displays all the information about annotations on the page.
- The reload button in the center of the annotations bar refreshes the list of annotations on the page/document, allowing you to see additional annotations that may have been added or updated by other users. You can also use the reload button to escape from editing an annotation and discard changes—but

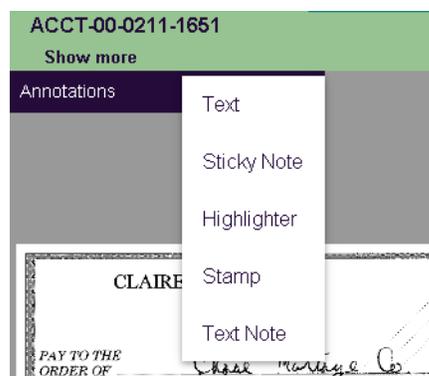
only while you are still editing the annotation. Otherwise, changes are automatically saved when you finish editing that annotation (i.e., clicking the DONE button).

Reload is *not* an “undo” button. Once the annotation is saved, you must edit/modify your annotation again to make further changes.

Note:

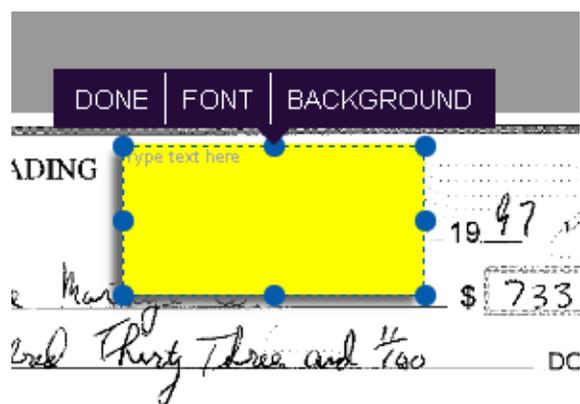
You can undock the annotations bar or list from its default position and move it elsewhere on the screen.

- 2 Click the plus sign and select the type of annotation:



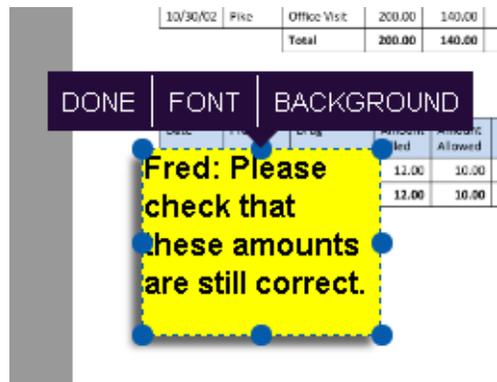
- 3 Create the annotation. For example, to create a sticky note:

- a Use the mouse to position the note somewhere on the page, and drag to create the sticky note box:



- b Enter text for the sticky note. You can resize the sticky note as needed with the handles. Change the font style or size by clicking Font, or modify the background color by clicking Background. See [“Changing Style and Appearance” on page 34](#) for more information.

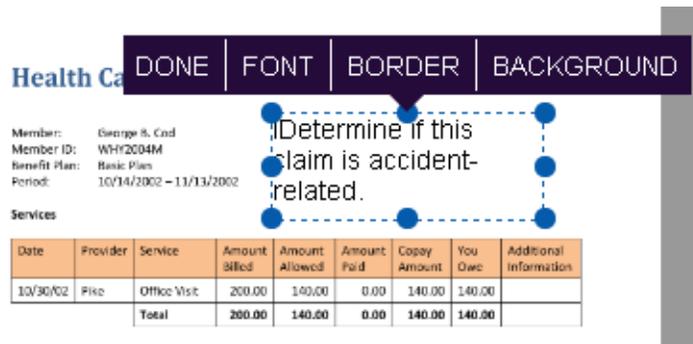
For example, after adding text to a sticky note, it might look like this:



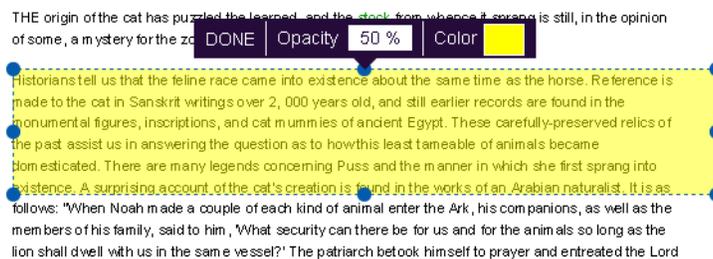
- c Save the annotation by clicking DONE.

Creating other annotations is similar:

- Text annotations work almost identically to sticky notes, but you can also control the color and thickness of a border around them:

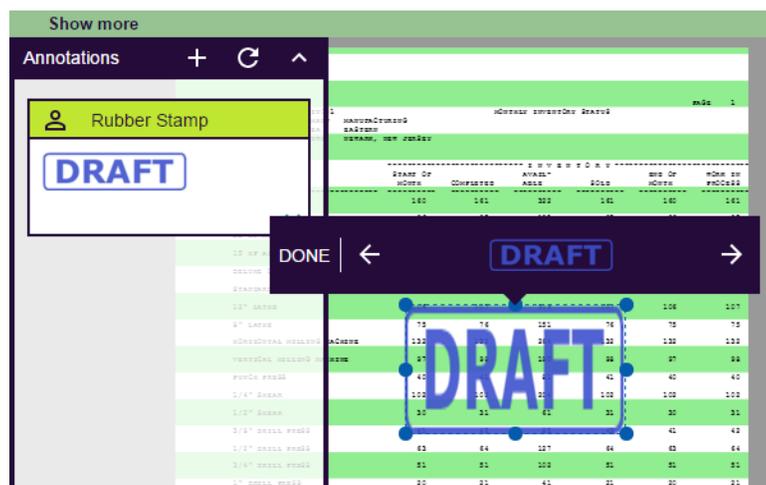


- Highlighter annotations are simply blocks of color that you place over text on the page. Changing the color and its opacity (i.e., transparency) are options:



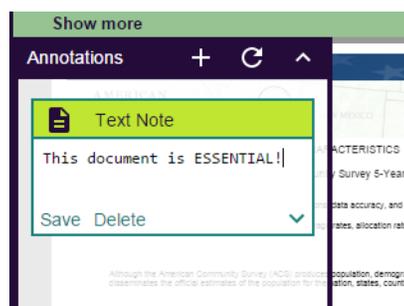
Using different highlight colors might be useful, for example, when highlighting multiple items on a page for different reasons.

- For rubber stamp annotations, use the horizontal arrows to choose the stamp, placing and sizing it as required:



Note that the annotations list appears, showing all annotations on the page.

- Text notes apply to the document without having a physical position on the page. So they only appear in the annotations list rather than appearing on the page:



Modifying and Deleting Annotations

You can modify annotations in a number of ways. Modifications are automatically saved as you work, with the reload icon on the annotations bar available to roll back unwanted changes before you save them.

Note:

Only the creator/owner of a particular annotation can edit or delete it. Annotation permissions are based on Recipient IDs, and may include even finer variations. For example, you may have permission to create an annotation, but then not subsequently modify or delete it.

Changing Annotation Text

You can change text appearing in text, sticky note, or text note annotations by selecting them, selecting the text as necessary, and entering new text. If required, you can resize the text and sticky note fields with their handles.

Changing Style and Appearance

Annotation font size and style, background color, opacity, border appearance, and other properties are easy to modify with fields, slider controls, and submenus. The annotation list displays all annotations associated with the page, displaying the annotation details and metadata.

Deleting Annotations

You can delete annotations that you created.

To delete annotations

- 1 Select the annotation. If you have permission to delete it, a DELETE button appears on the metadata display connected to the annotation.
- 2 Click DELETE.
- 3 A confirmation popup appears asking “Are you sure you want to delete this annotation”. Click OK. This permanently removes the annotation.

Extracting Data from Documents

You can extract data from your documents and subsequently filter it as required. After filtering it to your specifications, you can print or download it. There are two different methods associated with the initial extraction: using a *predefined rule*, or using the *rule editor* (which is similar to the *data definition tables* used in DocumentDirect for the Internet) to create your own rules.

A rule is a series of specifications defining how to extract data. Predefined rules in Luminist are created and maintained by your system administrator. (There is also a default rule supplied with all systems called “All lines”.) You cannot change them. For information about both kinds of rules, see:

- [“Extraction Using Predefined Rules” on page 35](#)
- [“Creating Extraction Rules” on page 37](#)

After extraction, you can create filters for further refining your data. Creating filters in an editor is similar to constructing searches. See [“Creating Extraction Filters” on page 40](#).

Extraction Using Predefined Rules

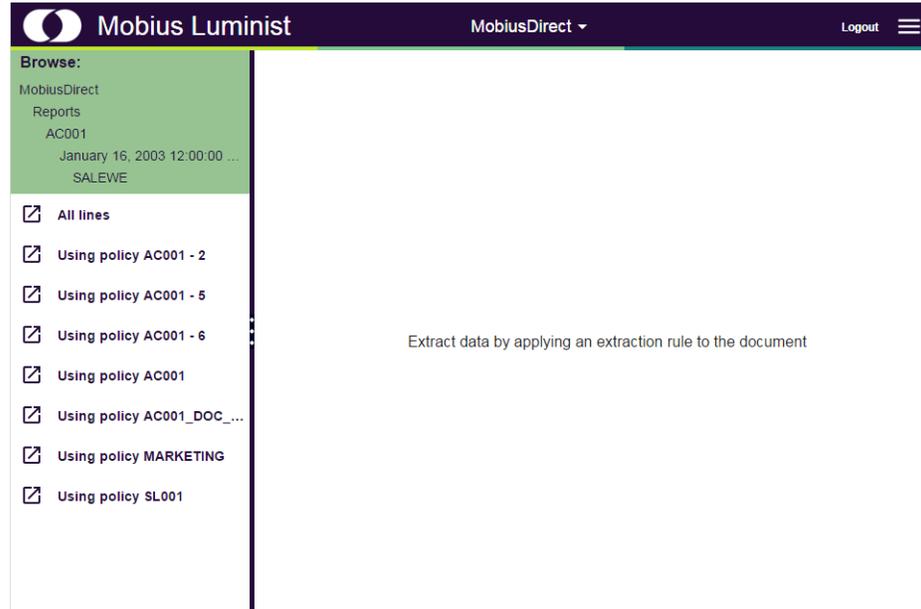
This section assumes that your system administrator has created the necessary rule for extracting data.:

To extract data with a predefined rule

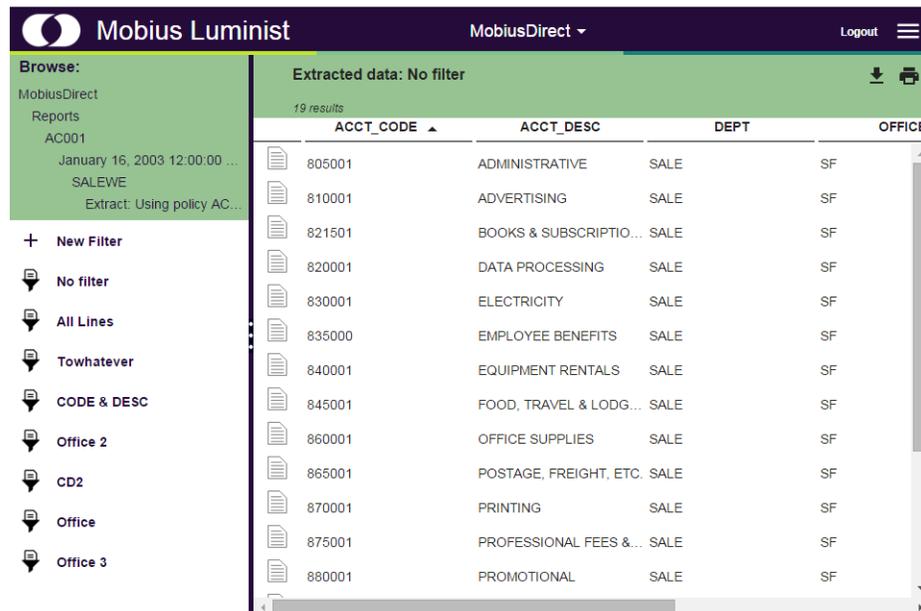
- 1 In the Document Viewer, open the document containing the data:

ACCOUNT CODE	DESCRIPTION	PLANNED USD	ACTUAL USD	VARIANCE USD	PLANNED USD	ACTUAL USD	VARIANCE USD
800000	ADVERTISING	1,249	2,227	978	22,087	22,822	8,735
811001	BOOKS & SUBSCRIPTIONS	79	141	62	766	1,287	621
830000	DATA PROCESSING	1,498	2,870	1,372	14,459	26,182	11,723
830000	ELECTRICITY	1,498	2,870	1,372	14,457	26,178	11,721
830000	EMPLOYEE BENEFITS	894	1,772	878	9,593	17,370	7,777
840000	EQUIPMENT RENTALS	1,245	2,219	974	10,017	21,760	9,743
840000	FOOD, TRAVEL & LODGING	948	1,890	942	9,193	16,874	7,681
860000	OFFICE SUPPLIES	28	50	22	269	486	218
860000	POSTAGE, FREIGHT, ETC.	990	1,766	776	9,873	17,334	7,461
870000	PRINTING	99	177	78	957	1,733	776
871001	PROFESSIONAL FEES & DUES	30	54	24	293	531	238
890000	PROMOTIONAL	101	180	79	879	1,769	790
890000	REPRODUCTION	113	204	90	1,104	2,002	898
895000	SALARIES & WAGES	1,246	2,221	975	10,024	21,772	9,748
905000	SUBCONTRACTORS	431	769	338	4,183	7,838	3,655
900000	SUPPLIES	46	81	35	440	796	356
930000	TELEPHONE & TELEGRAPH	876	1,582	706	8,436	15,312	6,876
890000	RENT	871	1,593	722	8,412	16,232	6,820
OFFICE TOTAL:		13,995	24,235	10,240	101,224	237,622	106,398
REGION TOTAL:		13,995	24,235	10,240	101,224	237,622	106,398
DEPARTMENT TOTAL:		49,519	88,273	38,754	477,968	849,504	287,240

- 2 Select **Extract and Filter** from the choices under the document name in the Navigation Pane. This opens the list of rules available on your system in the Navigation Pane:



- 3 Select the desired rule and click it (or click **Apply rule** under it). The extracted data appears in the right pane:



- 4 If you have defined filters, select one to refine the data further. For example CODE & DESC, to just output those two columns:

The screenshot shows the Mobius Luminist interface. The top navigation bar includes the Mobius Luminist logo, the user name 'MobiusDirect', and a 'Logout' button. The left sidebar shows a 'Browse' menu with 'MobiusDirect' selected, followed by 'Reports' and 'AC001'. Below this, there is a document entry for 'January 16, 2003 12:00:00 ... SALEWE' with the text 'Extract: Using policy AC...'. The main content area is titled 'Extracted data: Filtered by CODE & DESC' and shows '2 results'. A table displays the following data:

ACCT_CODE	ACCT_DESC
905001	SUBCONTRACTORS
935001	TELEPHONE & TELEGR...

At the top right of the data display, there are icons for downloading and printing. The left sidebar also contains a 'New Filter' button and a list of filters: 'No filter', 'All Lines', 'Towhatever', 'CODE & DESC', 'Office 2', 'CD2', 'Office', and 'Office 3'.

Downloading and Printing Data after Extraction and Filtering

Use the Download and Print icons that appear at the top right of the display for downloading or printing the displayed filtered data. The icons appear whenever these options are available. Printing works as described in [“Printing Documents” on page 28](#).

Downloading filtered data with a default filter is different from downloading viewed documents. You have a choice of XML or CSV (comma-separated values) download formats rather than PDF. When downloading using filters that you created, only the CSV format is available. In other respects, the downloading process works as described in [“Downloading Documents” on page 27](#).

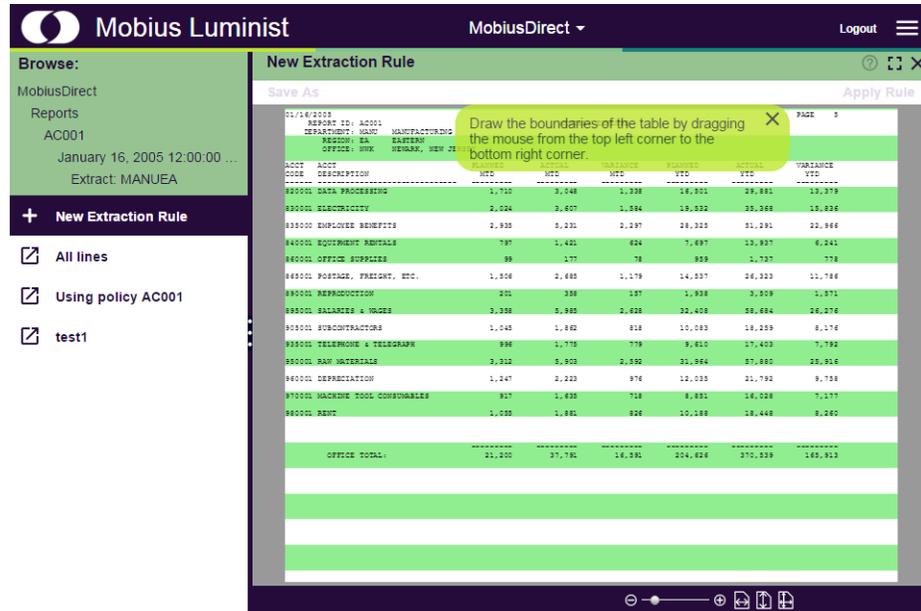
Creating Extraction Rules

Besides using predefined extraction rules, you can add your own rules to fine-tune the extraction process to your needs. Rules that you create are associated with your Recipient ID and appear in your lists of rules whenever you are logged into the Luminist repository where they reside. This allows you to apply your rules to as many documents as necessary.

To create an extraction rule

- 1 Navigate to the desired document and select Extract and Filter under the document name in the Navigation Pane.

- Click “+ New Extraction Rule” at the top of the list of extraction rules in the Navigation Pane. The Rule Editor opens.



- Follow the instructions in the advice popup shown above to define a table defining boundaries for the data you want to extract. For example:



Note:

Close the advice popup by clicking its X. Click the question mark icon at the top right to open it.

- If you didn't size the table correctly initially, resize it by dragging its borders.

5 Move the mouse over the column boundaries to reveal additional controls:

01/18/2009
REPORT ID: AC01
DEPARTMENT: MFG
MANUFACTURING
REGION: EA
EASTERN
OFFICE: MGR
NEWARK, NEW J

Save As Apply Rule

Resize the table by dragging the outer borders; split, rename and format the column by using the menu buttons.

ACCT CODE	DESCRIPTION	MTD	MTD	MTD	YTD	YTD	VARIANCE
83000	DATA PROCESSING	1,110	3,048	1,338	16,301	39,881	13,378
83000	ELECTRICITY	2,024	3,627	1,584	18,332	35,368	13,836
83000	EMPLOYEE BENEFITS	2,938	5,231	2,297	28,325	51,291	22,966
84000	EQUIPMENT REPAIRS	787	1,441	654	7,897	13,837	6,040
86000	OFFICE SUPPLIES	88	177	78	855	1,737	778
86000	POSTAGE, FREIGHT, ETC.	1,358	2,648	1,178	14,337	24,323	11,784
88000	REPRODUCTION	201	358	187	1,938	3,909	1,871
88000	SALARIES & WAGES	3,398	8,983	2,628	32,408	58,884	26,476
90000	SUBCONTRACTORS	8,710	17,117	917	10,283	18,259	8,176
93000	TELEPHONE & TELEGRAPH	1,110	2,024	910	8,810	17,403	7,782
93000	RAM MATERIALS	3,312	8,923	2,590	31,864	37,880	25,916
96000	DEPRECIATION	1,247	2,223	978	12,033	21,792	9,758
97000	MACHINE TOOL CONSUMABLES	917	1,635	718	8,891	16,028	7,137
99000	RENT	1,058	1,881	828	10,188	18,448	8,260
OFFICE TOTAL:		21,200	37,781	18,081	204,826	370,539	165,913

Split Rename Format

Set Text Anchor

Use the controls as follows:

- **Split** allows you to break columns into narrower columns. (There is also an inverse **Merge** control that becomes available when you hover over a column separator.)
- **Rename** allows you to rename columns. This may prove useful because the column names become the output field names after extraction.
- **Format** allows you to set the type of data in the column (Currency, Date, Text, Number) and specify whether the column is of fixed or variable size.

There are additional settings under each type of data, for example, to specify the formats used for currency or date values. These include whether to include decimal points, use commas or periods as separators, etc.

- **Set Text Anchor** allows you to set the overall table position relative to character strings appearing in the document. You can specify which instance of a string to use, if the string match must be case-sensitive, and if the table should be stretched to the edge of the document page. This feature is particularly useful for tables that are not always in the same position on different pages.
- **Start Over** allows you restart the extraction rule definition from the beginning.

Each control opens its own popup with OK and CANCEL choices to retain or discard settings.

Controls not shown are **Show Table Header** and **Hide Table Header**, which only appear when the mouse is adjacent to the header at the top of each column. These controls toggle the header display on and off. Note that they only affect the extracted data for downloading and printing.

- 6 Click Apply Rule on the upper right to test the extraction.
- 7 Continue to modify the rule until it works as desired, then click Save As at the upper left and enter a name for it.

After you have saved a rule, additional choices appear atop the rule editor to rename the rule, or save it as a different rule without changing the original.
- 8 Click the X at the upper right to close the Rule Editor. Alternate methods of closing the Rule Editor include clicking another entry in the breadcrumbs or folder hierarchy, or selecting Search or Favorites from the Masthead menu.

Once your rule works correctly, you can use it the same way as predefined rules, including filtering the extracted data as described in [“Creating Extraction Filters” on page 40](#). You can edit your rule further by selecting Edit under the rule name in the Navigation Pane.

Creating Extraction Filters

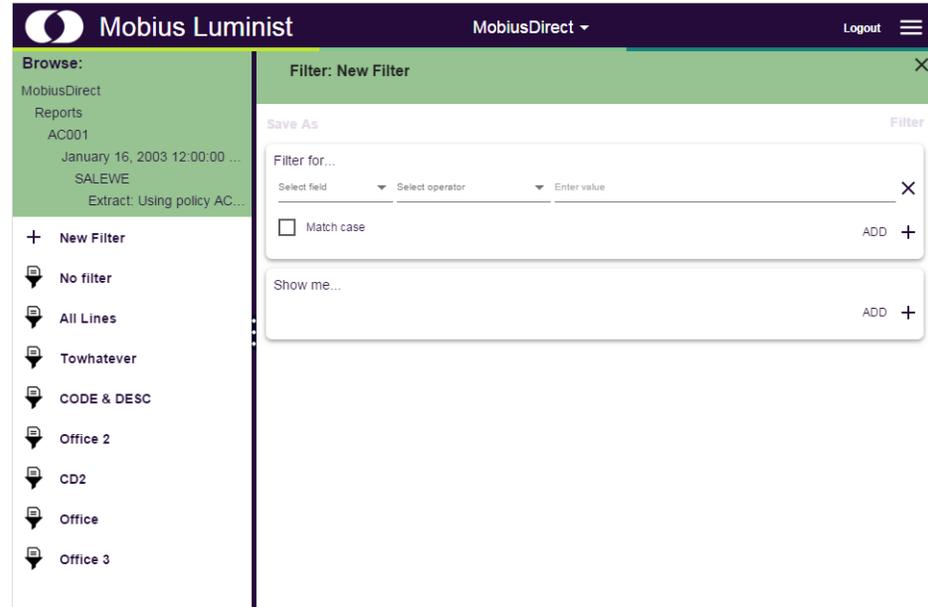
After performing initial extraction with extraction rules, you can define how their output is refined with filters.

Note:

Extraction filters belong to a particular Recipient ID and are only available to the user who created them.

To create a filter

- 1 Navigate to the document containing the target data and perform the extraction as described in [“Extraction Using Predefined Rules” on page 35](#).
- 2 Click “+ New Filter” in the Navigation Pane:



“No filter” or “Unfiltered” is the default filter associated with all extraction rules. It doesn’t perform any filtering of the extracted data.

- 3 Construct the filter in the Filter for... section:
 - a Choose a field from the Select field pulldown.
 - b Choose an operator from the Select operator pulldown.
 - c Provide a value in the Enter value field. You are notified if you provide an incorrect value, such as a numeric for a character value.
 - d Select Match case if you are working with character data and you only want to match uppercase or lowercase instances.
 - e Click “Add +” if you want to create a second filter condition, and repeat steps a through d to specify it.

- 4 Define the output in the Show me... section:
 - a Select a field from the list. These are the same fields as in the Select field choice in step 3.
 - b Specify a sorting order for the output.
 - c Click “Add +” if you want to create a second output condition, and repeat steps a and b.

- 5 Execute the filter by clicking Filter at the upper right. Modify it if necessary.

- 6 To save the new filter, select Save as on the upper left and give it a name.

Modifying and Deleting Extraction Filters

If you have the authority, you can edit or delete a filter. You can tell if you have the correct permissions by moving the mouse over a filter name in the Navigation Pane and seeing if the **Edit** and **Delete** actions appear along with **Apply filter**.

Editing a Filter

When you click the **Edit** action, the filter opens in the same interface used to create a filter, but with additional actions at the top: **Save**, **Save as**, **Rename**, and **Undo changes**. You edit a filter much as described in [“Creating Extraction Filters” on page 40](#).

Deleting a Filter

When you click the **Delete** action, the filter is removed *immediately*. There is no confirmation message, nor any means to undo the deletion, so make sure that you have chosen the right filter before clicking **Delete**.

Working with Favorites

Designating documents, document pages, and folders as favorites allows you to access them quickly. Your favorites are available whenever you are using Luminist in Favorites mode, and are stored in a folder hierarchy that you create. Your favorites are associated with your Recipient ID, and are accessible whenever you are connected to the corresponding repository with Luminist.

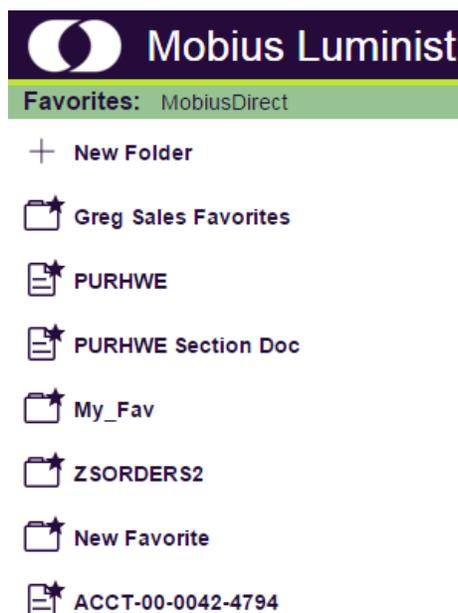
Because your favorites and their hierarchy are tied to your Recipient ID, they are not available as favorites to other users. Positioning items within your own favorites hierarchy does not change their positions in the repository: they can always be found in their original locations in the repository.

Note:

Favorites are similar to *personal folders* in DocumentDirect for the Internet. If you have previously defined personal folders in a still-accessible repository, you can import them into Luminist as favorites. See [“Importing DocumentDirect for the Internet Personal Folders as Luminist Favorites” on page 46](#).

Accessing Favorites

You can see a list of all your favorites by selecting Favorites from the menu at the top right of the Luminist Masthead. This puts you into Favorites mode:



Place the mouse over an item to reveal the menu items underneath it. Actions you can select here include viewing, extracting and filtering, downloading, or printing. You can also edit a favorite (for example, rename it), or remove the favorite designation from the item.

Defining Favorites

You can define a folder, document, or individual page as a favorite from many areas of Luminist, including lists appearing in the Navigation Pane and documents displayed in the Document Viewer.

To define a favorite

- 1 Select the item you want to define as a favorite from a list, either in the Navigation Pane or elsewhere.
- 2 Select the Favorite choice from the list of actions under the item name in the list. Alternatively:
 - The star icon may appear at the top right of the Luminist display, just below the Masthead. Clicking there is equivalent.

- When you are viewing a document, the star icon appears at the top of the Navigation Pane. Clicking there is equivalent.

Or

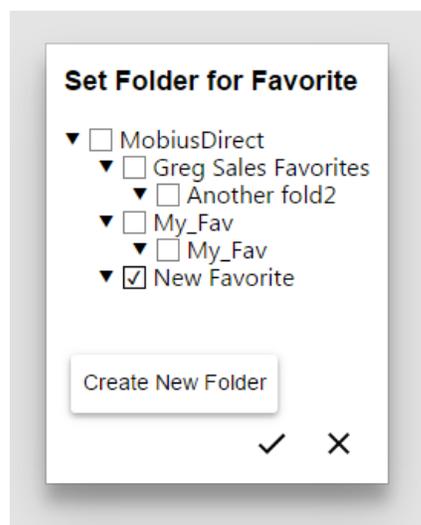
- When you are viewing a document, the star icon also appears among the controls at the top right of the Document Viewer: however, clicking there is slightly different. It allows you designate an individual *page* within a document as a favorite.

- 3 The Set Favorite Name popup appears, allowing you to either use the existing name of the item, or enter a custom name:

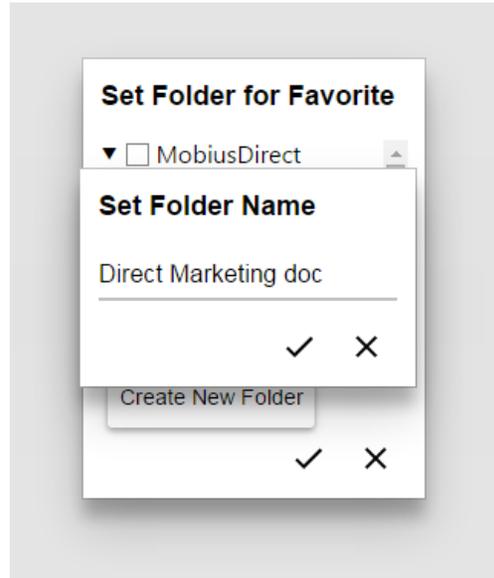


Click the check mark when you're satisfied with the name. Clicking X cancels saving the favorite.

- 4 The Set Folder For Favorite popup appears, allowing you to specify where you want the favorite to be saved. You can select an existing folder, or you can create and name a new folder and store your favorite there:



If you click Create New Folder, the Set Folder Name popup appears:



When you click the check mark, the new folder is created inside the folder that was previously selected (“New Favorite” in this example.)

- 5 You can add as many new folders as desired, and organize their hierarchy however you want. Click the check marks for verifying each action until you are done.

Note:

This is strictly your own folder hierarchy, and is not accessible to other Luminist users.

Removing Favorites

You can easily remove favorites from your favorites hierarchy.

To remove a favorite

- 1 Locate the favorite item in your list in Favorites mode. The Delete action appears as a choice beneath it.
- 2 Click Delete.
- 3 Confirm the deletion, and the item’s favorite status is removed. It no longer appears as an entry in your Favorites list.

Note:

Deleting a favorite only removes it from your favorites list, it does not delete the folder or document itself.

Editing Favorites

You can modify your favorites when in Favorites mode:

- In the Favorites list, move the mouse over a favorite item and choose the Edit Favorite action under it. This allows you to rename the item. You can also save it in a different folder, or create a new folder and save it there.
- By using the “+ New Folder” choice appearing at the top of the list in Favorites mode, you can create folders separately from the process of naming/renameing individual favorite items.

Importing DocumentDirect for the Internet Personal Folders as Luminist Favorites

Users who previously stored items in DocumentDirect for the Internet personal folders can import those items to their Luminist favorites. Users must be using the same Recipient ID on Luminist that they did on DocumentDirect for the Internet, and connect to the same, or equivalent, server/repository. If a user's personal folders are stored in more than one repository, a separate importing process is required for each repository.

Note:

Importing personal folders to Luminist is a manual operation performed individually by each user, or by the system administrator using the user's Recipient ID.

To import personal folders as Luminist favorites

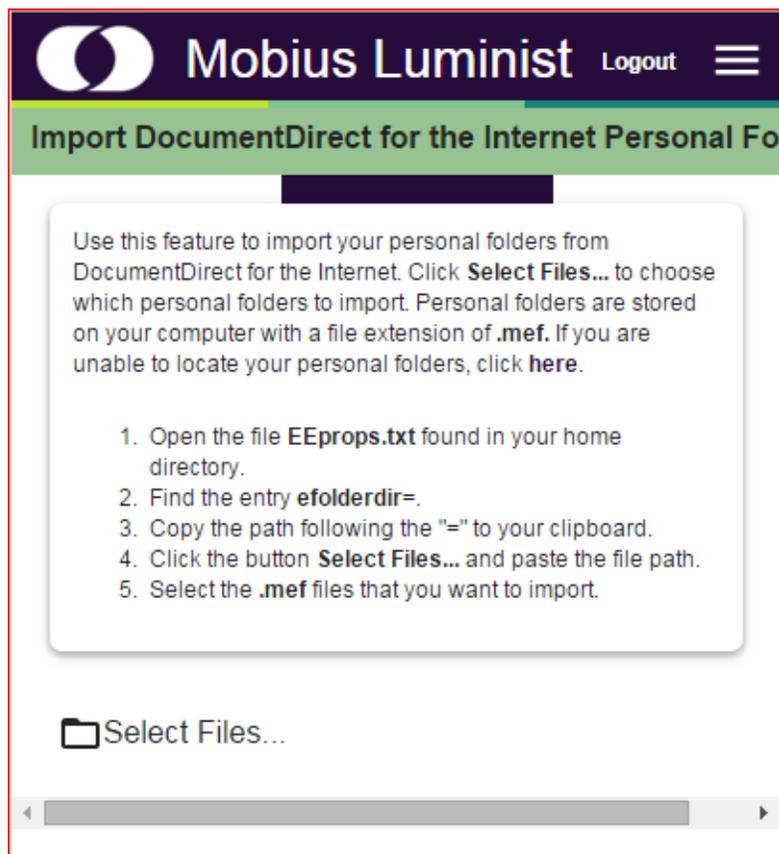
- 1 Enter a URL similar to the following, to open the personal folder importer:

```
http://<host>:<port>/luminist/luminist.html?action=folderimport
```

Your Luminist administrator can provide you with the correct URL.

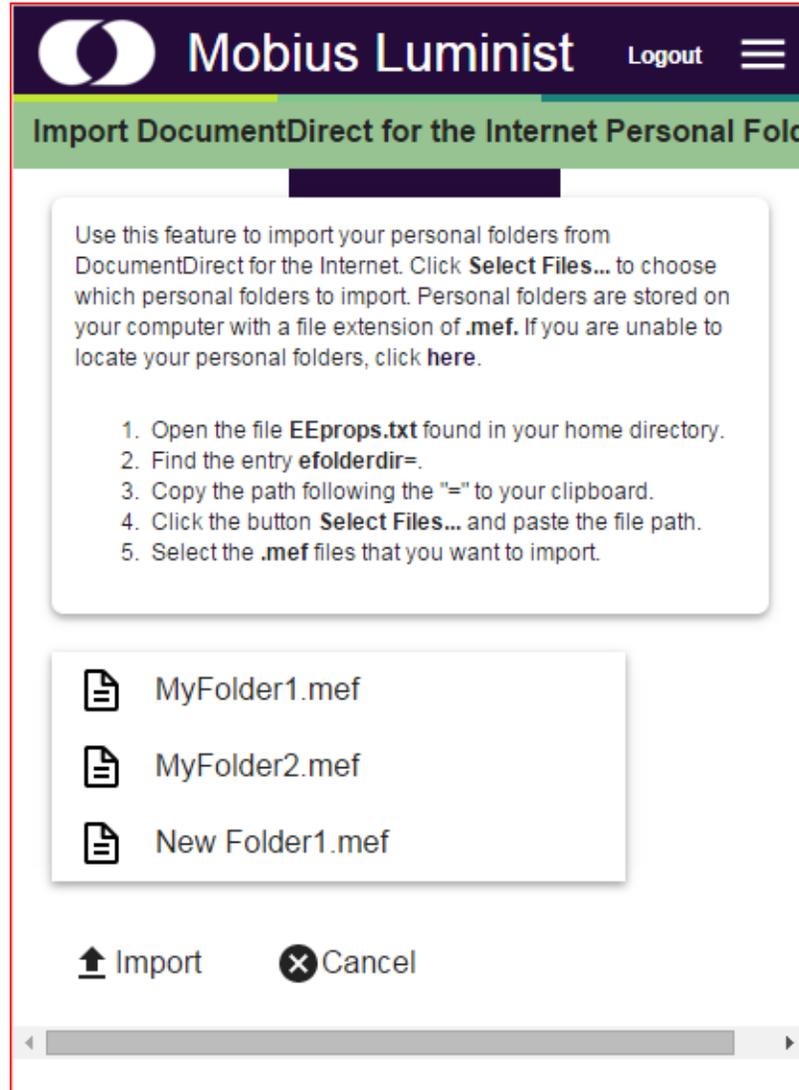
The Import page opens.

- 2 Click the “here” link in the introduction text in order to display detailed instructions. Click Select Files.



First, try entering %userprofile% to locate the directory containing your “.mef” files. If that method doesn’t work, follow the detailed instructions appearing on this page:

- a** Find your home directory and open the file EEprops.txt in a text editor. (Your home directory is typically the one assigned by the operating system to your User ID. For Windows, it is typically similar to C:\users*user-id*.)
- b** Locate the entry “efolderdir=” and copy the path following the equals sign to the clipboard. Close the EEprops.txt file.
- c** Click Select Files to bring up an Open dialog.
- d** Paste the path you copied in step b into the Open dialog to locate the directory containing your personal folders. The files there should have a “.mef” extension.
- e** Once you have selected files and clicked Open, they appear in a list at the bottom of the Import page:



- 3 Click Import. After the import is complete, a results list is displayed.
- 4 Click Import More Files if you want to import additional files/folders. Otherwise, click Logout or close the browser.

Note:

Repeating the import process for a previously imported personal folder may introduce duplicate items in your Luminist favorites list.

Logging Out and Closing Luminist

Log out of Luminist by clicking **Logout**. You are asked for verification before your session is terminated.

After you are logged out, a logoff page is displayed. To log in again, re-enter the Luminist URL.

Closing your Web browser, or the Luminist browser tab, also ends a Luminist session.

Note:

Typically, your administrator sets a timeout that automatically logs you out of Luminist if too much time goes by without activity somewhere in the Luminist browser window. A warning message is displayed some time before this occurs to allow you to remain connected.

ASG Worldwide Headquarters Naples Florida USA | asg.com