
Fluid Cast 2

Manual

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Fluid Cast - an overview

Introduction to Fluid Cast

Fluid Cast is a program that monitors a folder for files and then sends out emails based on these files. External systems such as ERP or accounting systems will drop files into a specific folder by batch. This will then trigger a mass sending of emails. The emails can be sent to a fax or SMS gateway such as Fluid Fax Server or Fluid SMS Gateway for mass fax and SMS.

Installing Fluid Cast

System Requirements

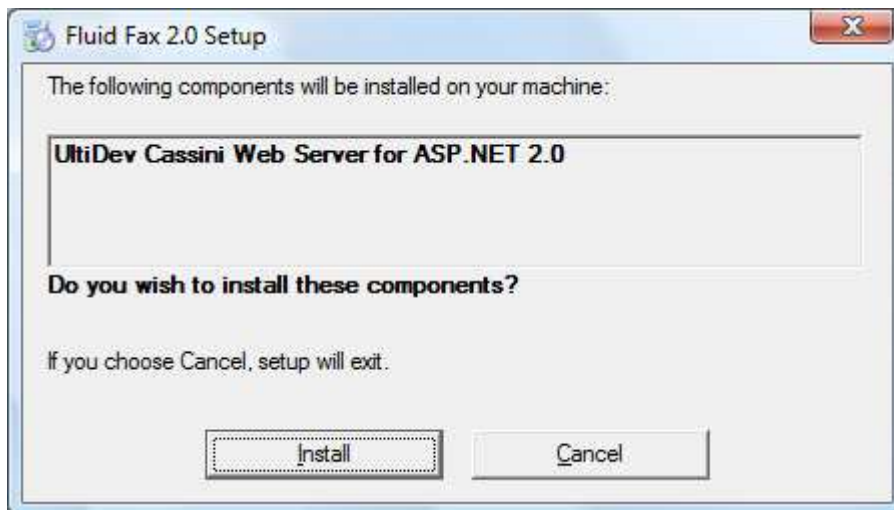
Fluid Cast can be installed on a computer that meets the following requirements:

- Windows 7, Vista, XP, 2008 and 2003 operating system.
- Microsoft DotNet Framework 2.0

Installation Procedures

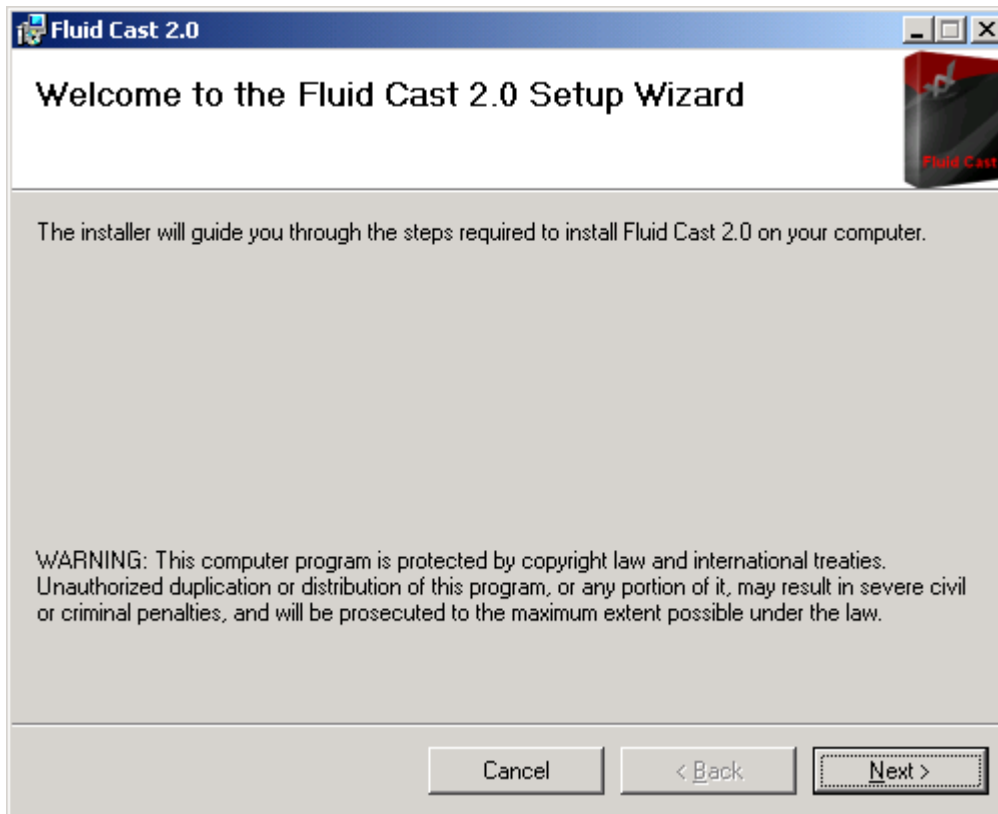
NOTE: Before installing Fluid Cast, ensure that you are logged on as Administrator and that all the other Windows applications are closed.

1. Double click the setup.exe installation program.
2. The installation program will check for the following pre-requisite components on the computer:
 - UltiDev Cassini Web Server for ASP.NET 2.0
 - Microsoft Windows Installer 3.1
3. The installation program will prompt for the installation of any missing pre-requisite components.
4. Fluid Cast is a self contained web application that does not require Microsoft IIS web server to be installed as it provides its own web server - UltiDev Cassini web server.
5. If the UltiDev Cassini web server has not been installed, a prompt will appear for its installation. Click **Install** to continue.



Screenshot 1 – UltiDev Cassini web server installation prompt

6. After installation of the pre-requisite components, Fluid Cast setup wizard will be launched. Click **Next** to continue.



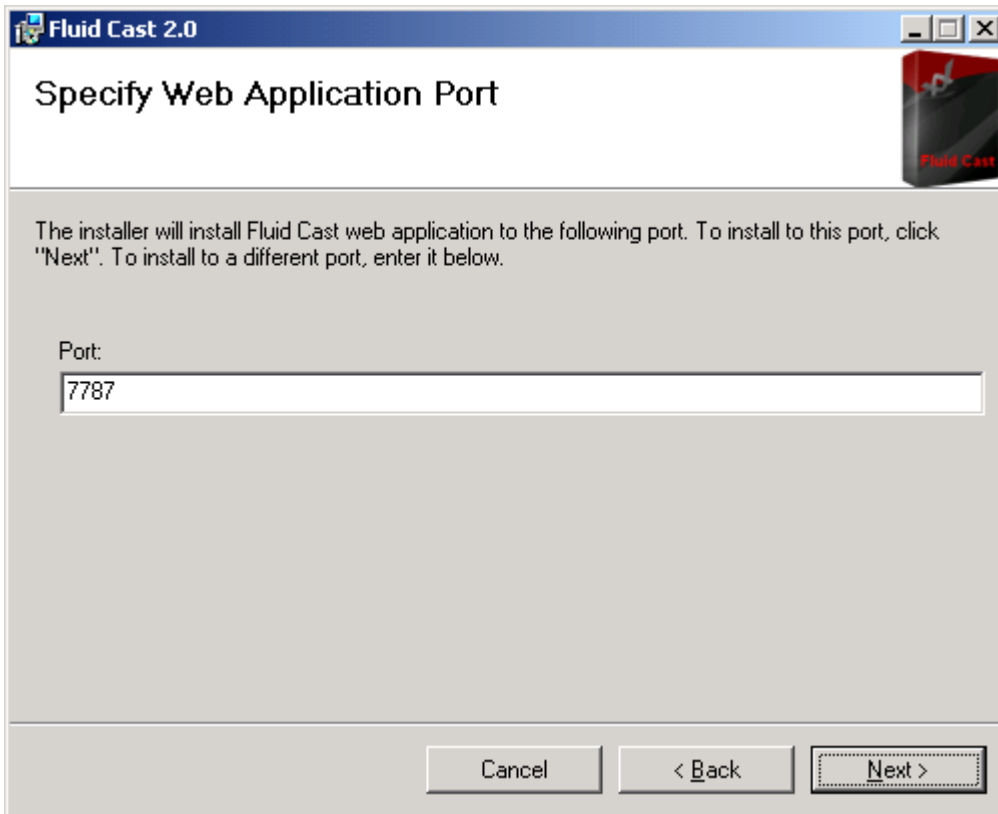
Screenshot 2 – Welcome screen

7. Read the license agreement. If you agree with the license agreement, select **I Agree** and click **Next** to continue.



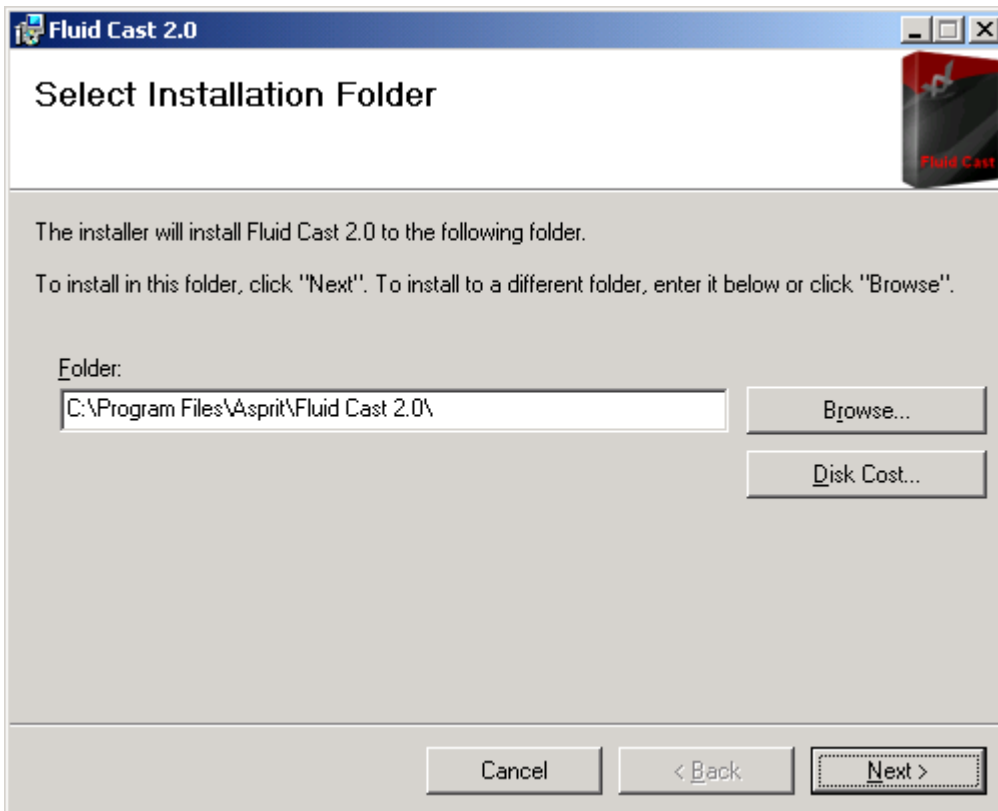
Screenshot 3 – License Agreement

8. Fluid Cast will host the web application at a specified port. You can accept the default port or specify a new port. Make sure that the port specified is currently unused. Click **Next** to continue.



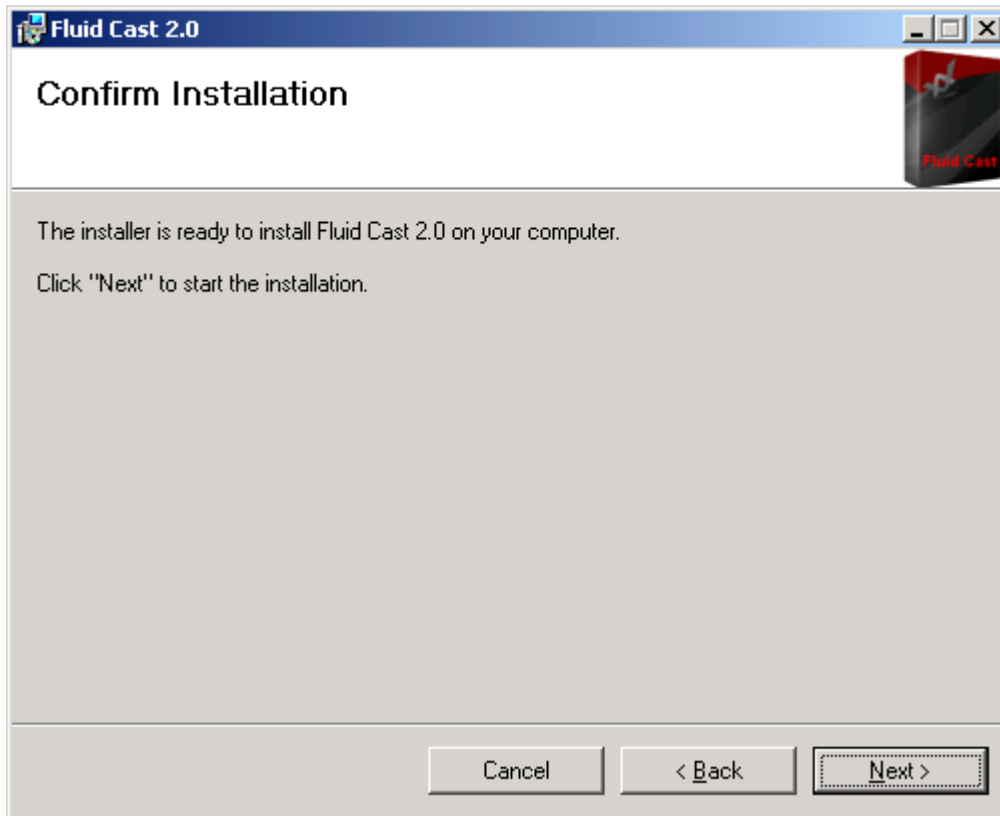
Screenshot 4 – Specify web application port

9. Select the appropriate installation folder and click **Next**.



Screenshot 5 – Select installation folder

10. A confirmation screen will appear. To confirm the installation, click **Next**.



Screenshot 6 – Confirm installation

11. After this, Fluid Cast would have been successfully installed. To confirm, go to the windows services panel, browse to **UltiDev Cassini Web Server for ASP.NET 2.0**. Make sure that the service is started.

12. One windows service will also be installed as follows. Make sure the service is started.

- Fluid Cast Attendant

Accessing Fluid Cast

Accessing from computer installed with Fluid Cast

1. Go to Start > All Programs > Fluid Cast 2.0 > Fluid Cast.
2. The web browser will be launched and will present the main page.

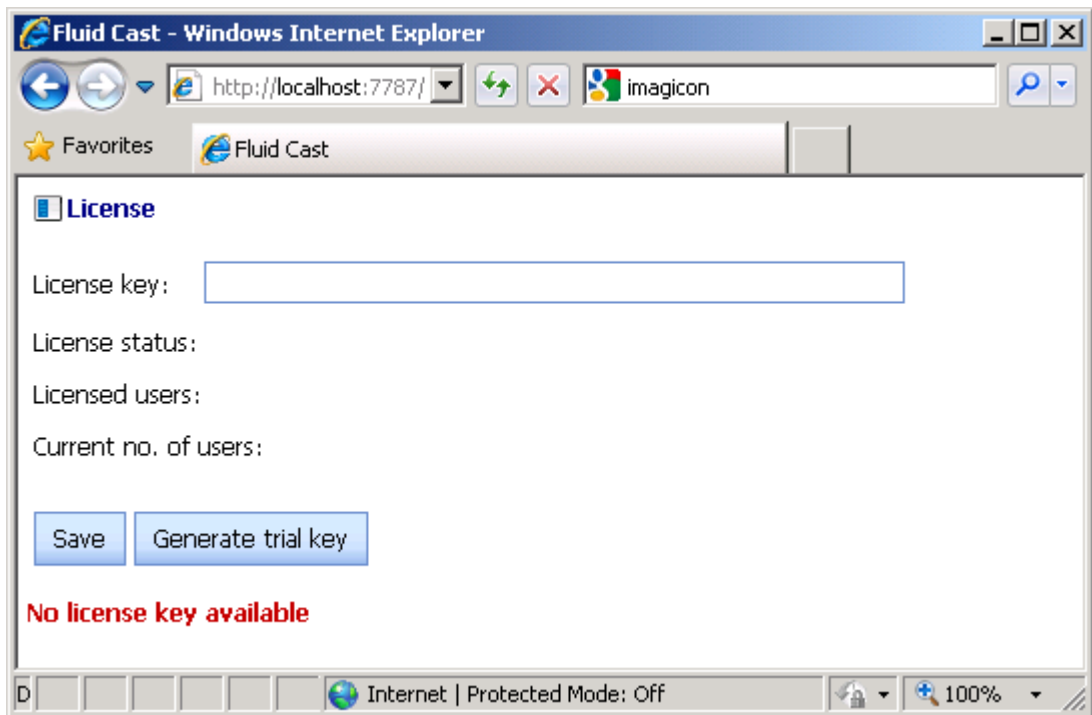
Accessing from remote computers

1. Open the page `http://<computername>:<port>` with the web browser.
 - `<computername>` - computer name of the computer that Fluid Cast is installed
 - `<port>` - web application port specified during installation.
2. Make sure that there is no firewall blocking the access to the specified port on the computer that Fluid Cast is installed. The default port is 7787.

Licensing

Configuring license information

1. Configure the license key when you launch the system for the first time.
2. Key in the license key and click **Save**.
3. If you are using a trial version, click **Generate Trial Key**.



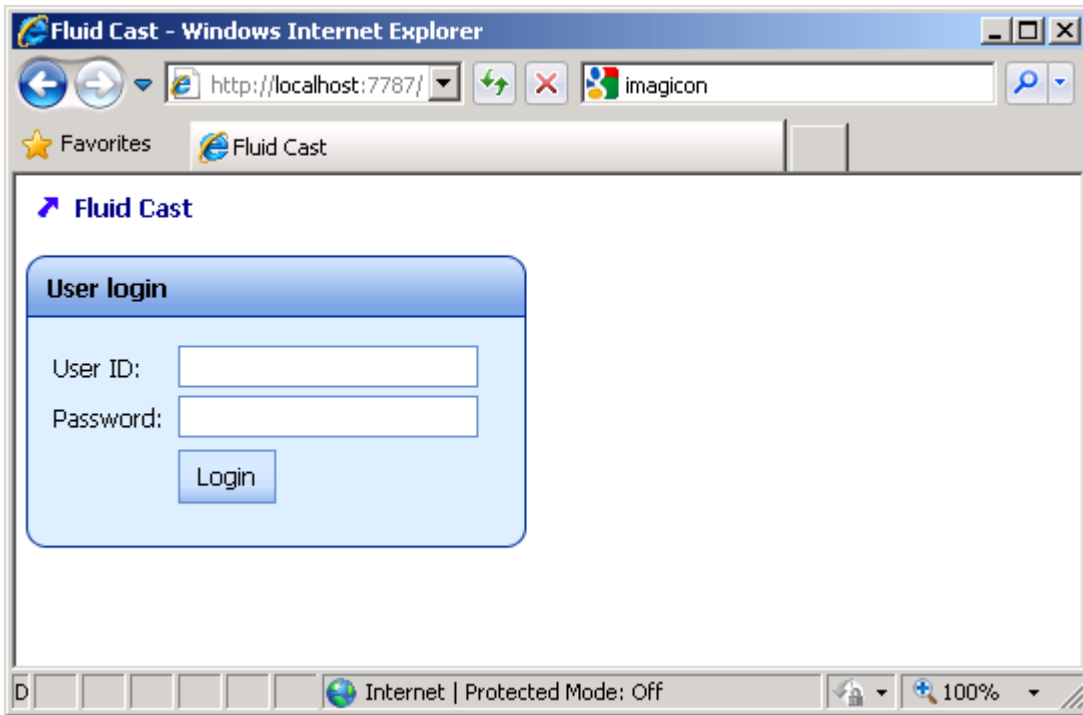
Screen

nshot 7 – License information

Login

Local user login

1. Fluid Cast keeps an internal database of licensed users. Upon login, the credentials keyed in by users are authenticated against this internal database.
2. The following shows the login screen.



Screenshot 8 – Login page

3. There is a built-in administrator account with user name / password as **admin / password**
4. For first time login, use the credentials for the built-in administrator account. Click **Login** to continue.

Folder Scanner

Folder scanner

Fluid Cast monitors a folder for files and then sends out emails based on these files. This section allows you to configure and monitor the sending process.

Configure source folder

The folder to be monitored by the Folder Scanner is configured in this section.

1. Click Folder Scanner on the menu.
2. Select the Configuration tab followed by the Source tab.
3. Set the following information:

- Enable - This option enables or disables the folder scanner.

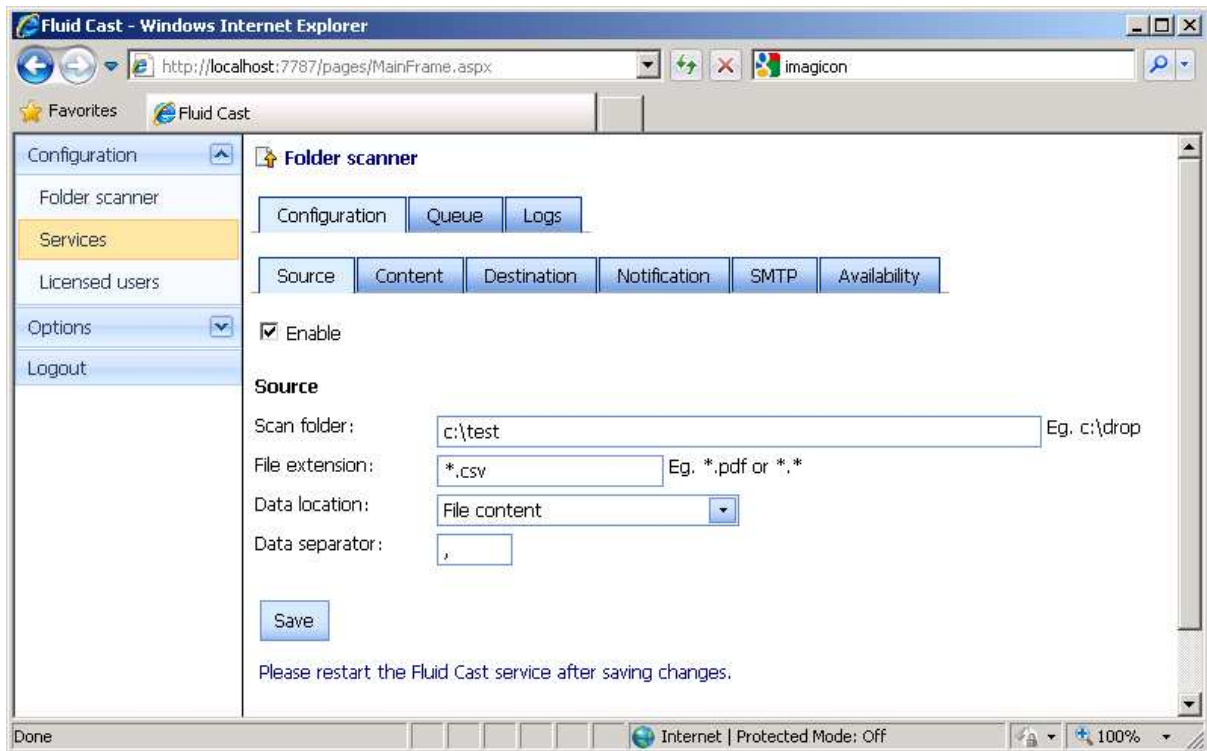
Source

- Scan Folder – The full path of the folder that is monitored.
- File Extension – The extension of files that are monitored. *.pdf means that only pdf files will be monitored while *.* means that all files will be monitored.
- Data Location – The location of data to be used. This information will be used to substitute values in the contents of the emails that will be sent.

There are three options:

- None: No information is used. This option will trigger one email for each file deposited in the Scan Folder.
- File Name: The data is located in the file name. This option will trigger one email for each file deposited in the Scan Folder.
- File Content: The data is located in the file content. This option will trigger multiple emails for each file deposited in the Scan Folder. An email will be triggered for each non-empty line in the file.
- Data Separator – The separator separating the data obtained from the Data Location.

4. Click **Save** to save the information.
5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.



Screenshot 9 – Folder scanner source

Configure email content

The email content is configured in this section. Parts of the email content can be substituted with the data retrieved from the Data Location separated by the Data Separator set in the previous section. Parameters in the format of {position} are used. The parameters starts from {0} followed by {1} and so forth.

Example 1: The data is specified in the file name.

- Data Location – File Name
- Data Separator – “~”

If the file name is “20100901_223000~INV12345~11111.txt” then

- {0} – “20100901_223000”
- {1} – “INV12345”
- {2} – “11111.txt”

Example 2: The data is specified in the file content.

- Data Location – File Content
- Data Separator – “|”

If a line in the file is “20100901_223000|INV12345|11111.txt” then

- {0} – “20100901_223000”
- {1} – “INV12345”
- {2} – “11111.txt”

Reserved words can also be used for data substitution as follows:

- {srcfilename} – Source file name

1. Click Folder Scanner on the menu.

2. Select the Configuration tab followed by the Content tab.

3. Set the following information:

- Nature – This is a read only field. It shows whether an email will be sent out for each line in the source file or each source file.
- Schedule – The schedule to send out the emails. The format of the schedule is <yyyyMMdd_HHmms>. If we need to send out an email on 1 Sep 2010 at 10:30pm, the schedule will be “20090910_223000”. Parameters such as “{0}”, “{1}” are allowed.
- Sender Email – The sender of the emails. Parameters are allowed together with the reserved words such as “{srcfilename}”. If the emails are sent to a fax or SMS gateway, then normally this is the licensed user’s email address in the database of the gateway.
- Recipient Email – The recipient of the emails. Parameters are allowed together with the reserved words such as “{srcfilename}”. If the emails are sent to a fax or SMS gateway, then normally this is the recipient of the fax or SMS. For Fluid Fax server, the format is “<fax_no>@fluidfax.com” and for Fluid SMS gateway, the format is “<mobile_no>@fluidsms.com”.

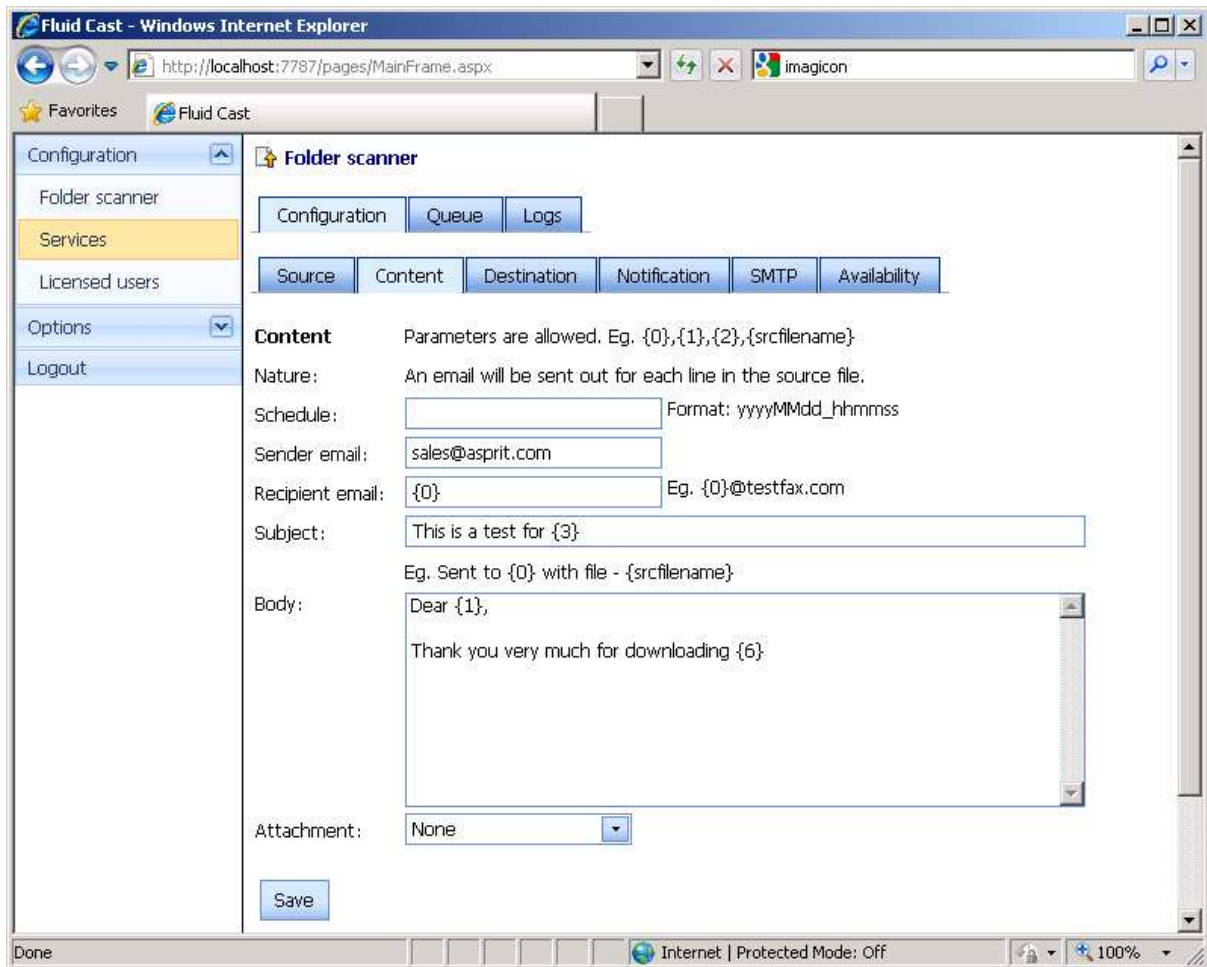
For instance if the emails are sent to Fluid Fax server and the data used is the first parameter, then the Recipient Email will be “{0}@fluidfax.com”.

For instance if the emails are sent to Fluid SMS Gateway and the data used is the first parameter, then the Recipient Email will be “{0}@fluidsms.com”.

- Subject – The subject of the emails. Parameters are allowed together with the reserved words.
- Body – The body of the emails. Parameters are allowed together with the reserved words.
- Attachment – The attachment of the emails. There are two options:
 - None: No attachment will be sent.
 - Source file: The source file will be sent.

4. Click **Save** to save the information.

5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.

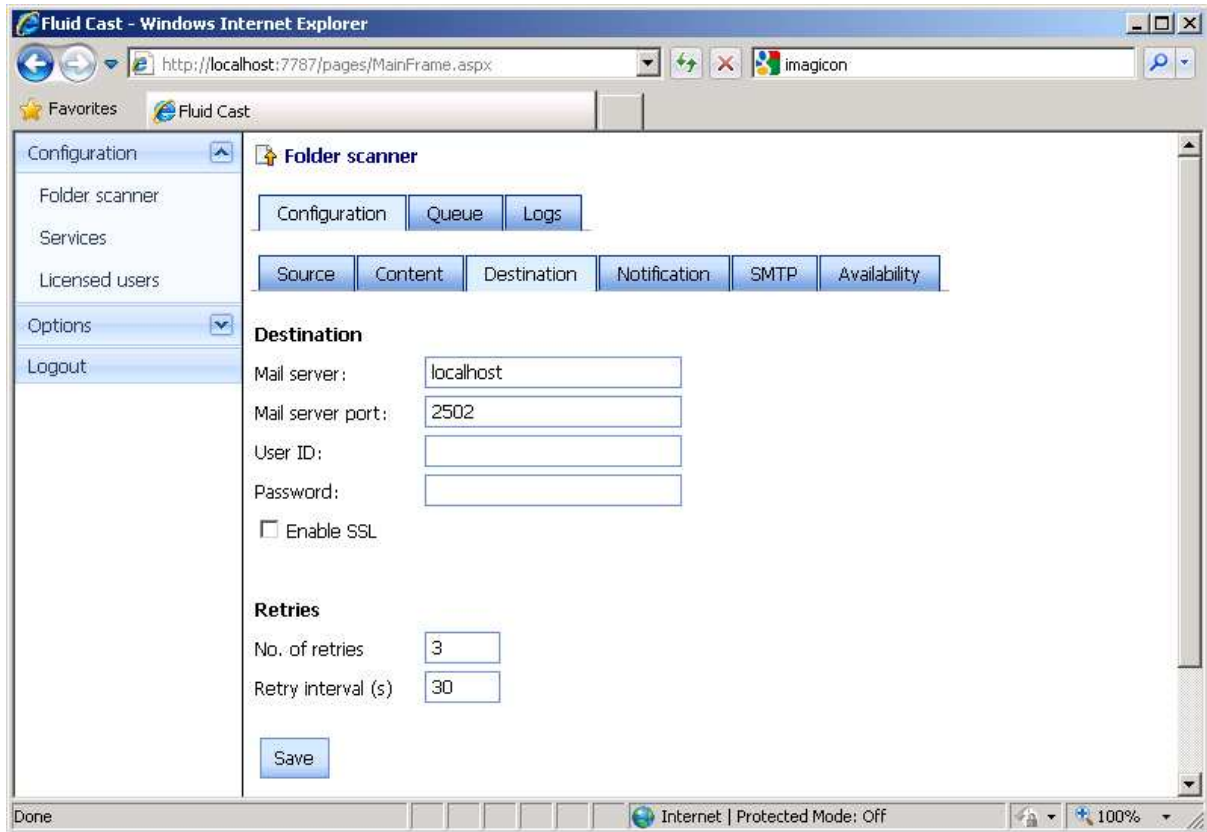


Screenshot 10 – Folder scanner content

Configure destination

The destination SMTP server of the emails is configured in this section.

1. Click Folder Scanner on the menu.
2. Select the Configuration tab followed by the Destination tab.
3. Set the following information:
 - Mail Server – The name or IP address of the mail server.
 - Mail Server Port – The SMTP port of the mail server. Typically it is 25.
 - User ID – The user id used to authenticate with the mail server.
 - Password – The password used to authenticate with the mail server.
 - Enable SSL – Specifies whether communication with the mail server is via SSL.
 - No. of Retries – The number of retries if mail sending fails.
 - Retry Interval (s) – The interval between each retries in seconds.
4. Click **Save** to save the information.
5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.

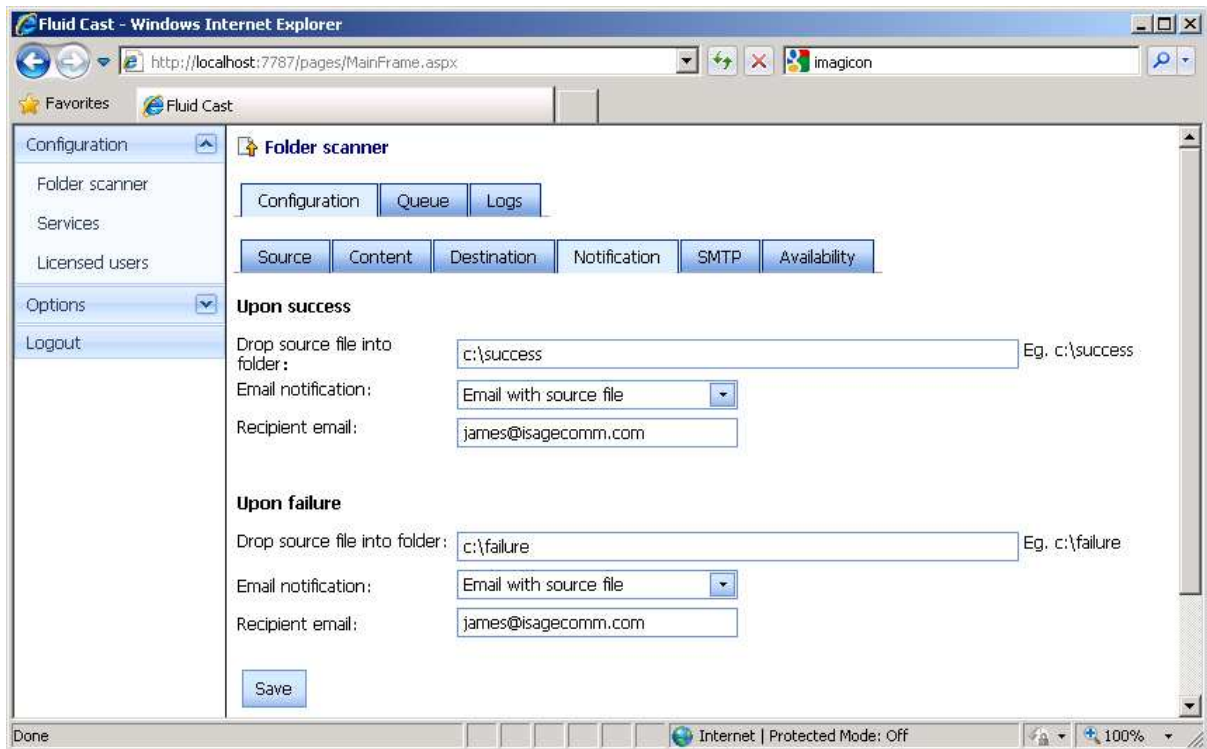


Screenshot 11 – Folder scanner destination

Configure notification

The actions taken based on the status of the email sending is configured in this section.

1. Click Folder Scanner on the menu.
2. Select the Configuration tab followed by the Notification tab.
3. Set the following information for emails successfully and not successfully sent:
 - Drop source file into folder – The folder to drop the source file into.
 - Email notification – Specifies whether an email will be sent. There are three options:
 - None: No email will be sent.
 - Email without source file: An email will be sent without an attachment.
 - Email with source file: An email will be sent with the source file as an attachment.
 - Recipient email – The recipient of the email notification.
4. Click **Save** to save the information.
5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.

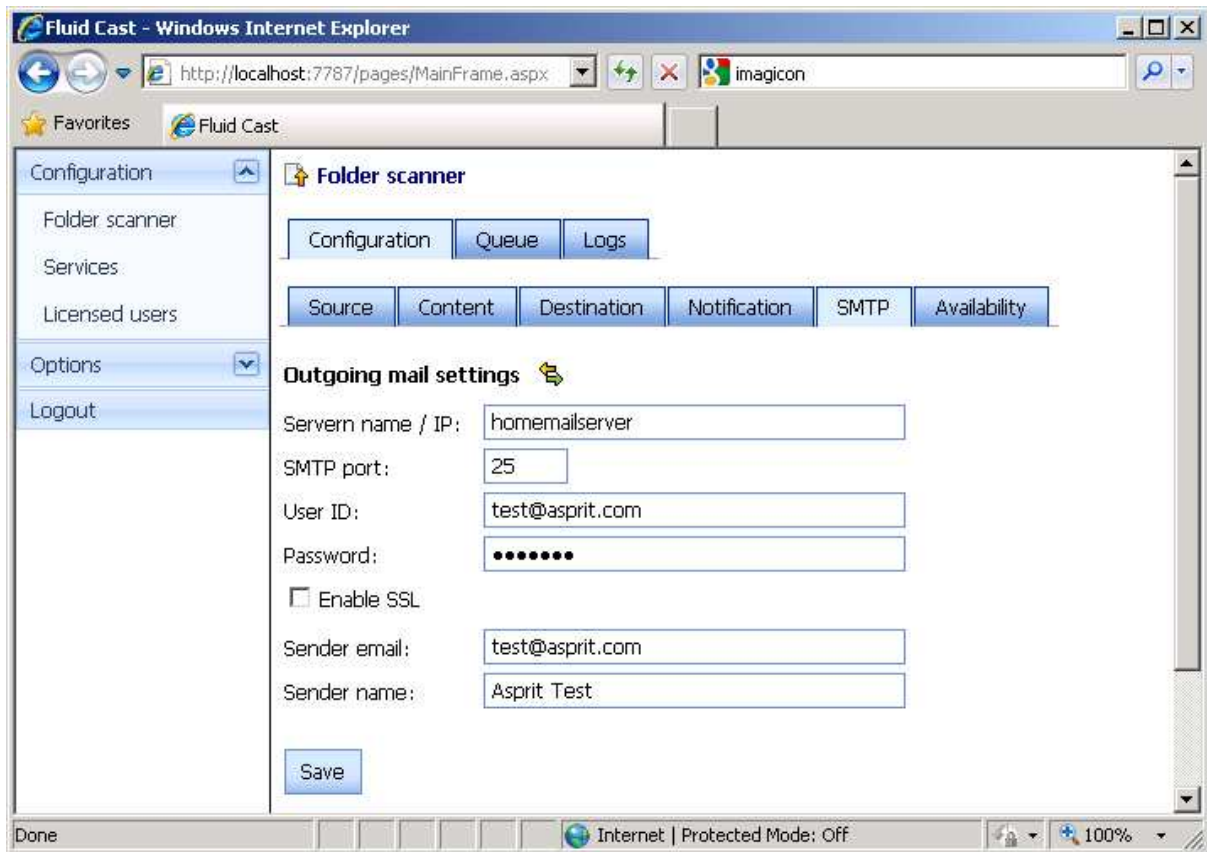


Screenshot 12 – Folder scanner notification

Configure SMTP

The email notifications are sent via an external SMTP server. Typically this is the company's mail server.

1. Click Folder Scanner on the menu.
2. Select the Configuration tab followed by the SMTP tab.
3. Set the following information:
 - SMTP Name/IP – The name of the SMTP server.
 - SMTP Port – The port of the SMTP server. The typical port is 25.
 - User ID – The user id used to send out an email.
 - Password – The password used to send out an email.
 - Enable SSL – Specifies whether the communication with the SMTP server is via SSL.
 - Sender Email – The sender email address for sending out email notifications.
 - Sender Name – The sender name for sending out email notifications.
4. Click **Save** to save the information.
5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.

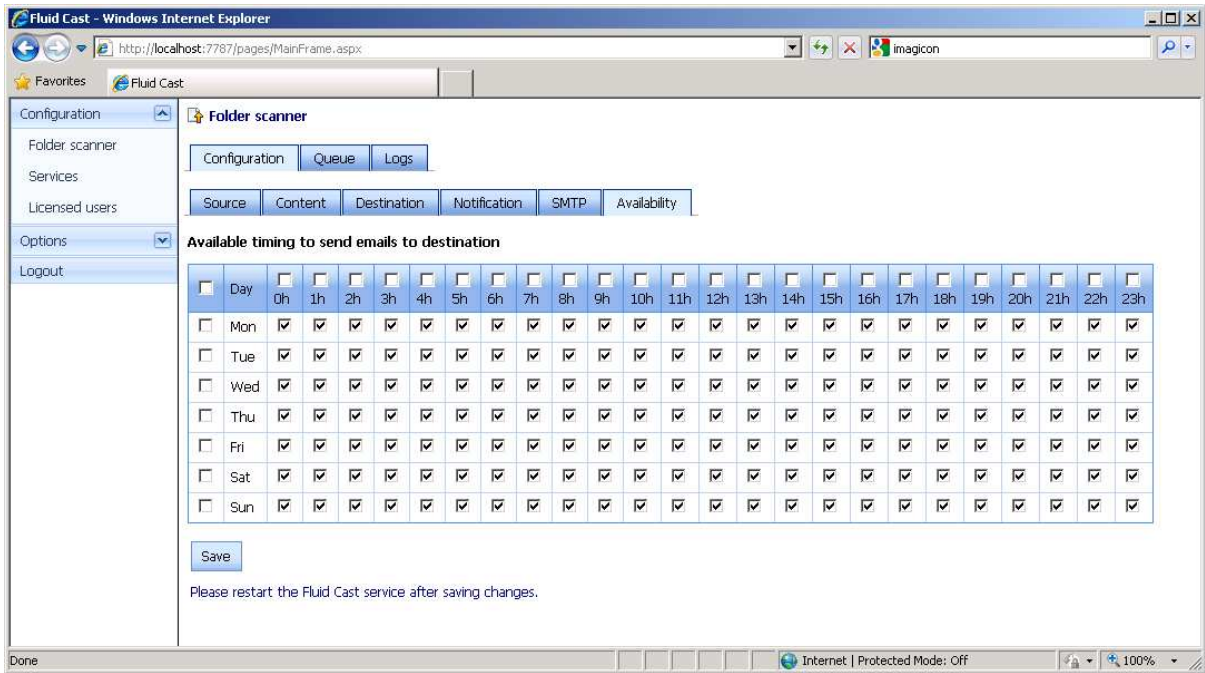


Screenshot 13 – Folder scanner SMTP

Configure availability

The active period for email sending is configured in this section. Fluid Cast will only send out emails to the destination during periods configured as active. This is especially when files are generated at midnight in batches and deposited into the scan folder. Fluid Cast will not start sending out emails to the SMS gateway at midnight which will trigger SMS sending. It will wait until the next active period to send out emails.

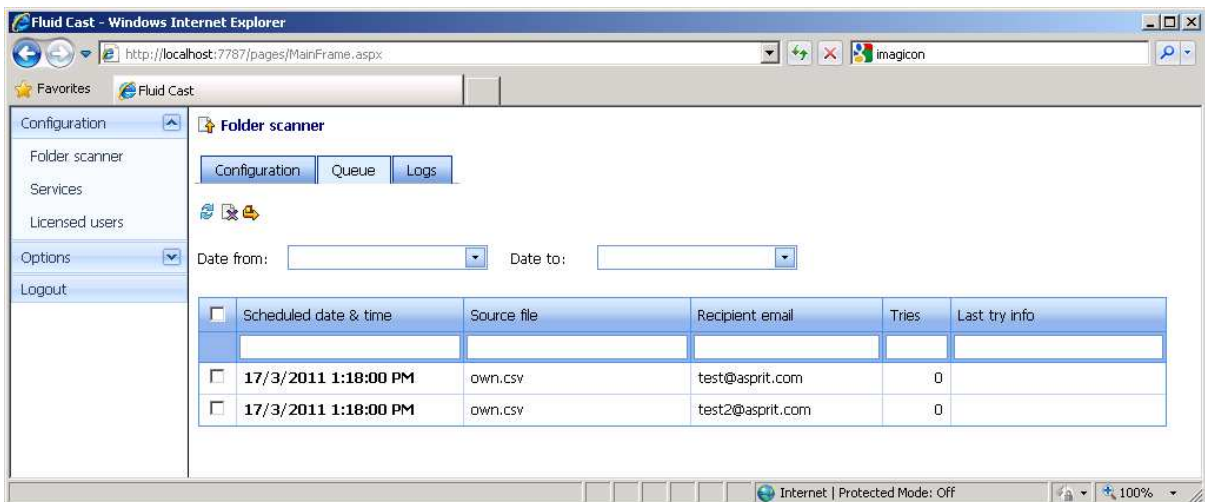
1. Click Folder Scanner on the menu.
2. Select the Configuration tab followed by the Availability tab.
3. Set the following information:
 - Check the checkboxes showing the days of the week and the time period.
 - If the checkbox 0h is checked, the period from 12:00am to 12:59am is active.
 - If the checkbox 23h is checked, the period from 11:00pm to 11:59pm is active.
4. Click **Save** to save the information.
5. The Fluid Cast Attendant windows service must be restarted for the information to take effect.



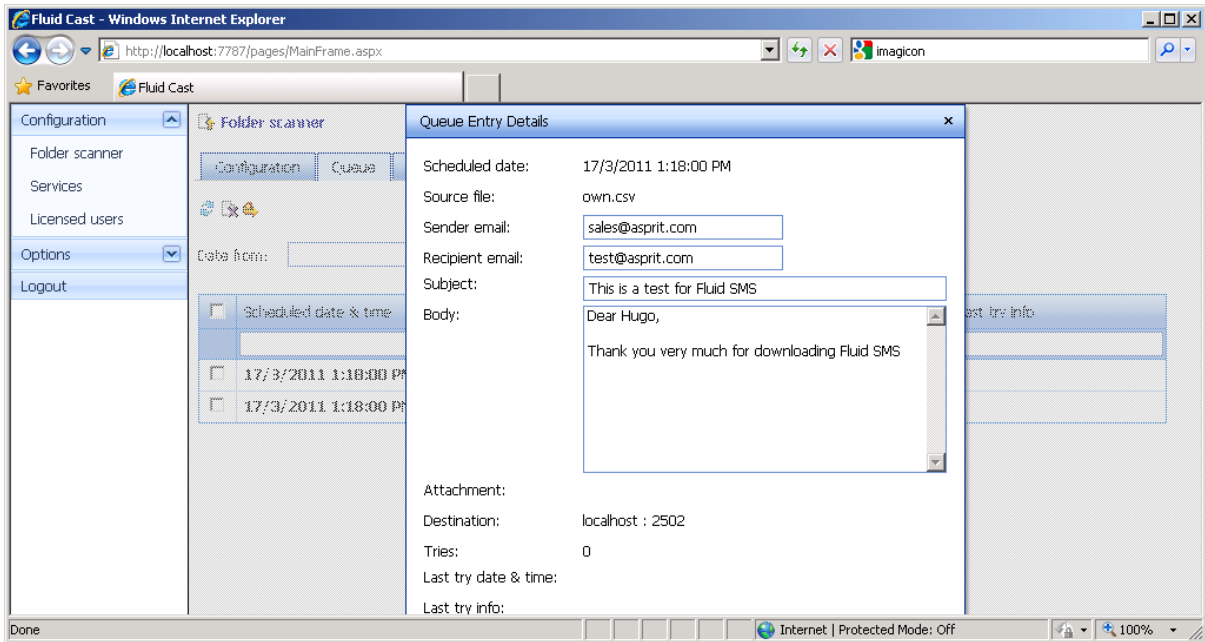
Screenshot 14 – Folder scanner availability

Checking queue

1. Click Folder Scanner on the menu.
2. Under the Queue tab, the list of email messages in the queue will be displayed.
3. To perform filtering, fill in the filter parameters.
4. To refresh the view, click **Refresh**.
5. To delete an email message, select the checkbox and click **Delete**.
6. To view an email message in detail, click on the first column.



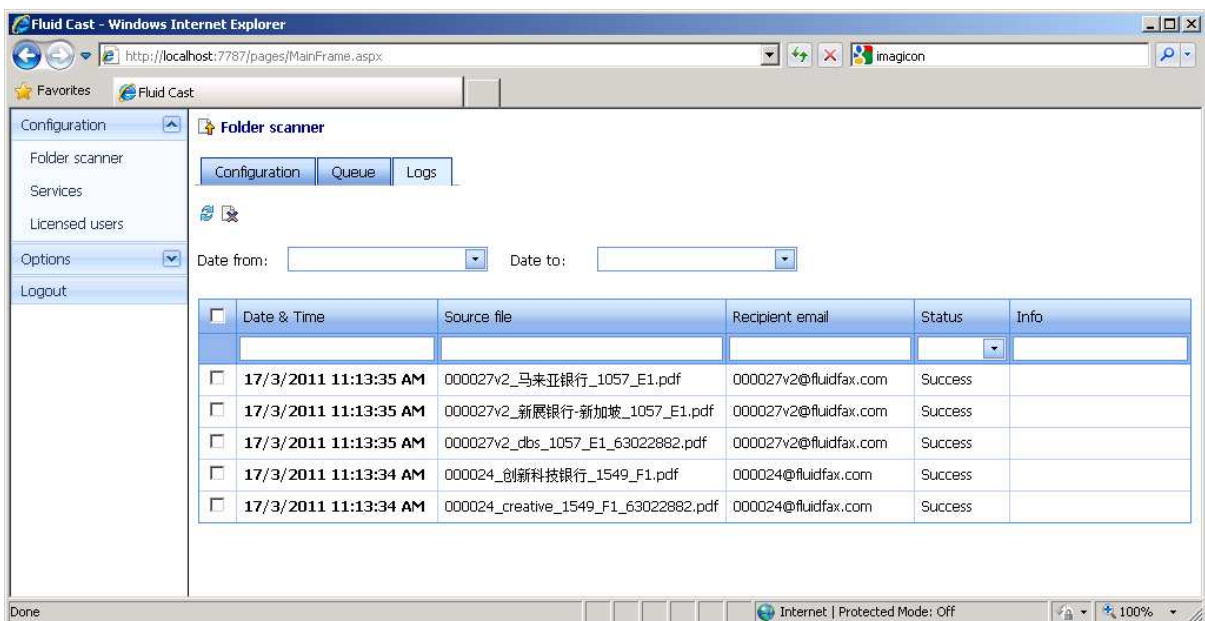
Screenshot 15 – Folder scanner queue



Screenshot 16 – Folder scanner queue entry

Checking log

1. Click Folder Scanner on the menu.
2. Under the Logs tab, the list of log messages will be displayed.
3. To perform filtering, fill in the filter parameters.
4. To refresh the view, click **Refresh**.
5. To delete a log entry, select the checkbox and click **Delete**.
6. To view a log entry in detail, click on the first column.

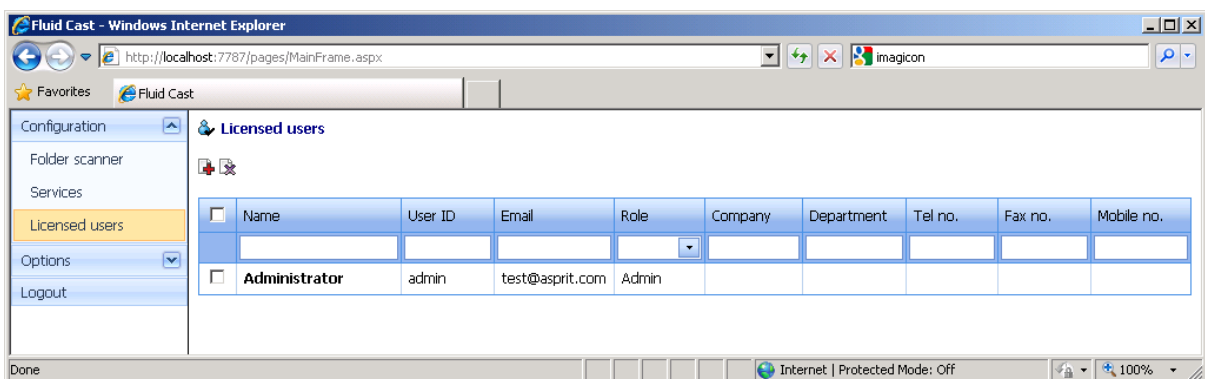


Screenshot 17 – Folder scanner logs

Licensed Users

Licensed users

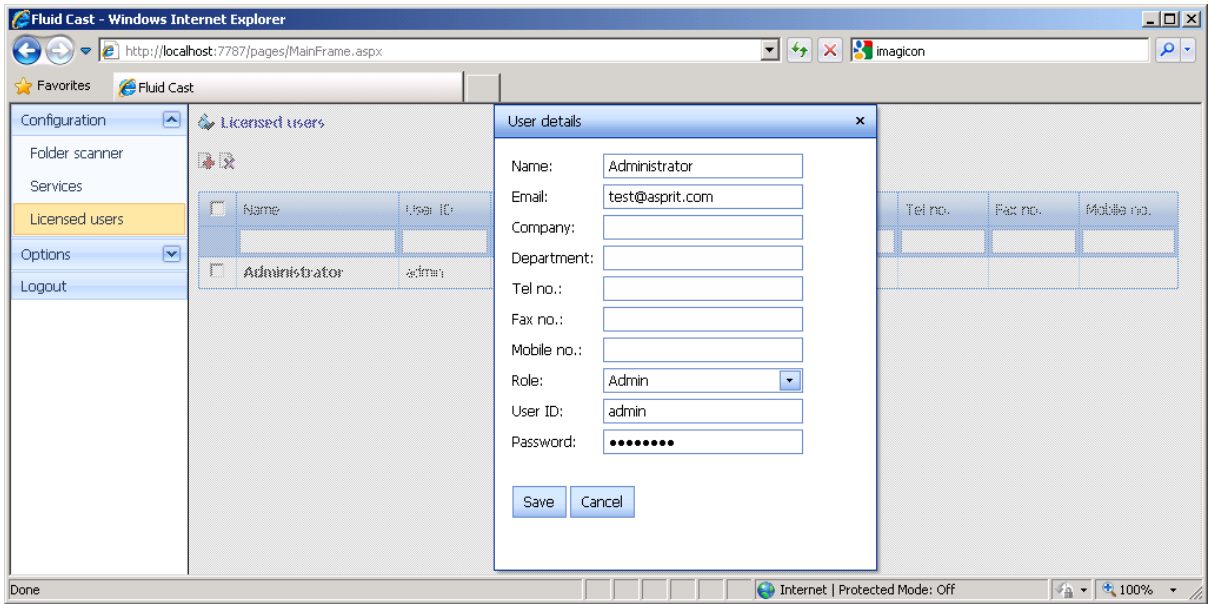
1. Click Licensed Users on the menu.
2. The list of licensed users will be displayed.
3. To perform filtering, fill in the filter parameters.
4. To add a new user, click **Add**.
5. To edit a user, click the first column.
6. To delete a user, select the checkbox and click **Delete**.



Screenshot 18 – Licensed users

Edit licensed user

1. Set the following information:
 - Full Name – The name of the user.
 - Email – The email address of the user.
 - Company – The company of the user.
 - Department – The department of the user.
 - Tel No. – The telephone number of the user.
 - Fax No. – The fax number of the user.
 - Mobile No. – The mobile number of the user.
 - User Role – There is one role in Fluid Cast as follows:
 - Administrator – Can perform configurations and view the logs.
 - User ID – The login id of the user.
 - Password – The login password of the user.
2. Click **Save** to save the information.

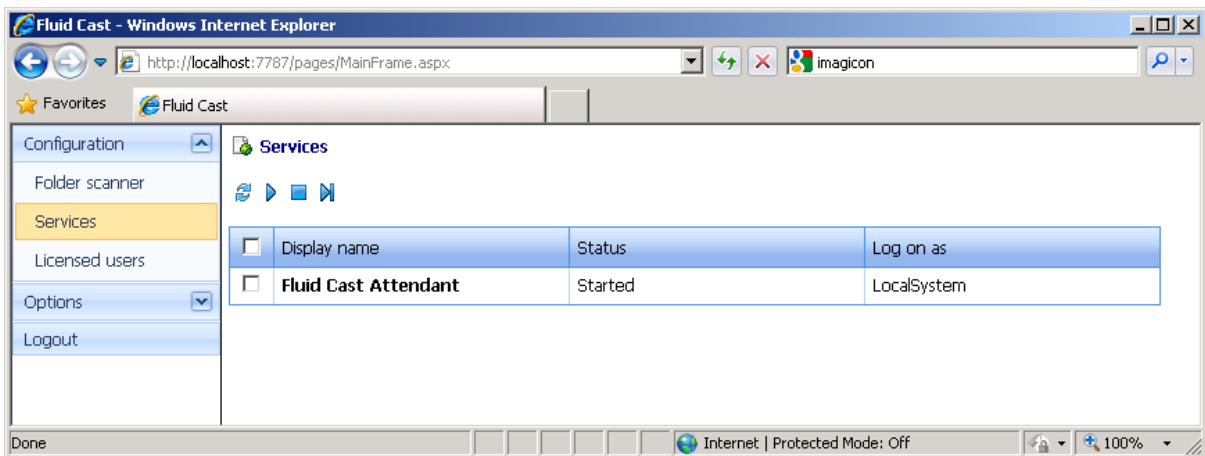


Screenshot 19 – Edit licensed user

Services

Services

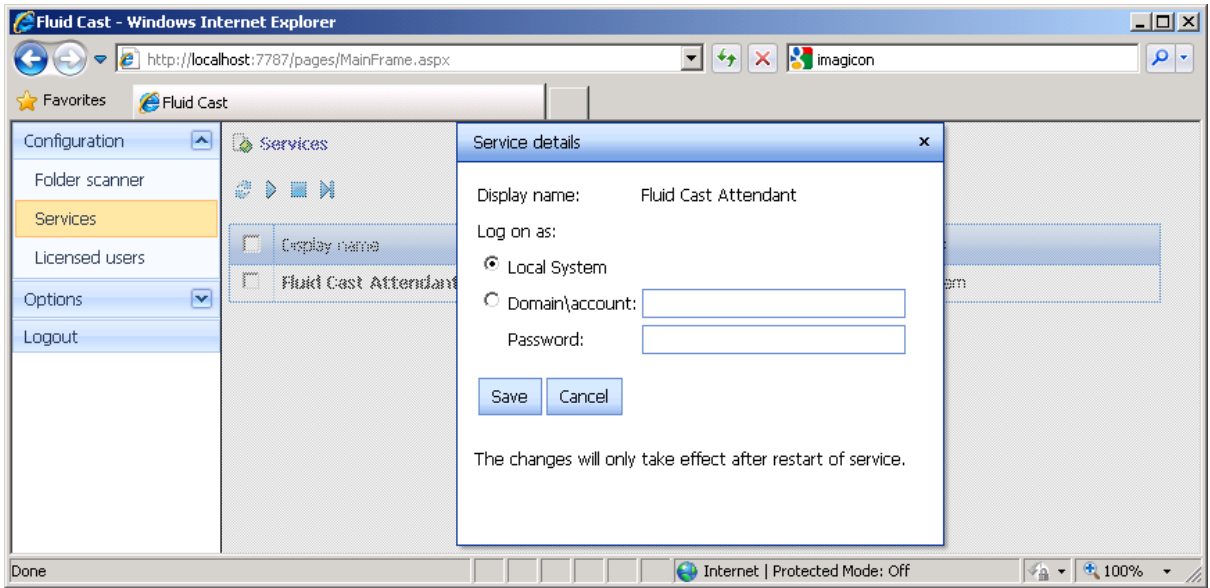
1. Click Services on the menu to monitor Fluid Cast windows service.
2. The following windows service is shown:
 - Fluid Cast Attendant
3. Perform the following actions:
 - Click **Stop** to stop a windows service.
 - Click **Start** to start a windows service.
 - Click **Restart** to restart a windows service.
 - To edit a windows service, click on the first column.



Screenshot 20 – Monitor services

Edit logon information

1. Set the following information:
 - Logon – The windows account that is used to start the windows service. The account can be Local System account or a user account. If a user account is used, the user name and password must be supplied.
2. Click **Save** to save the information.
3. The windows service must be restarted for the information to take effect.

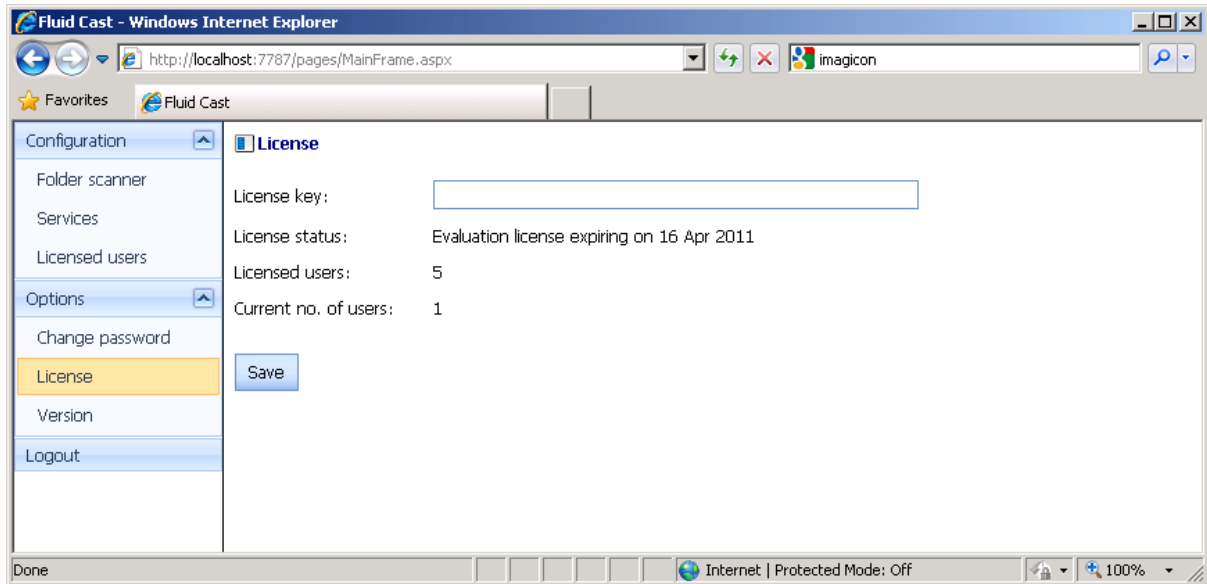


Screenshot 21 – Edit windows service

Licensing

Set license

1. To set the licensing information, click License on the menu.
2. Set the license key for Fluid Cast.
3. Click **Save** to save the information.

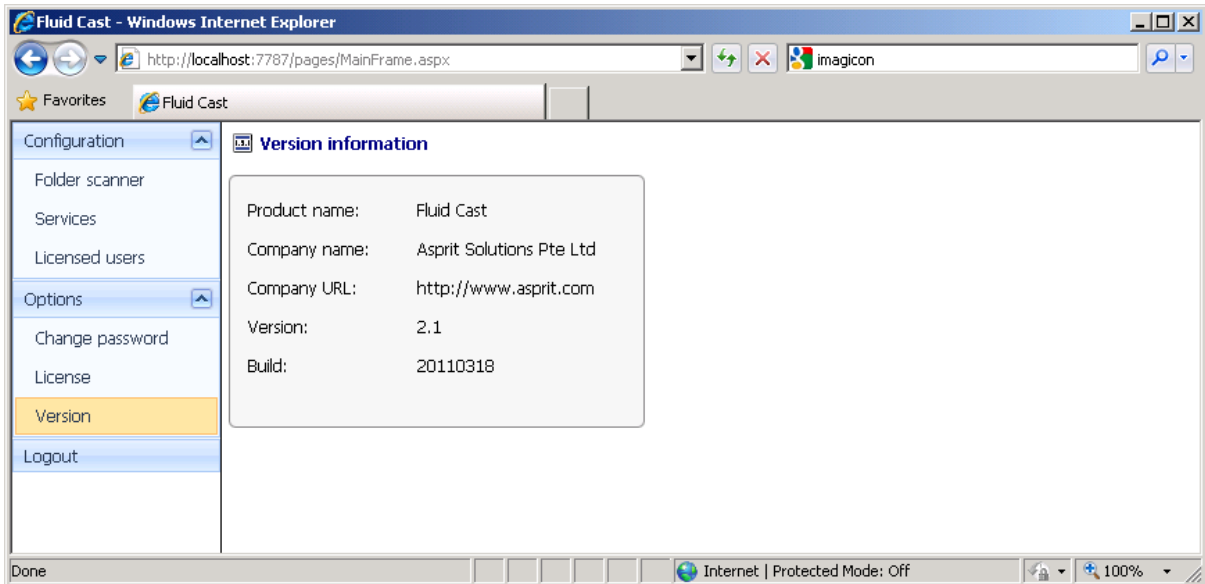


Screenshot 22 – License

Version

View product version

1. To view product version information, click Version on the menu.

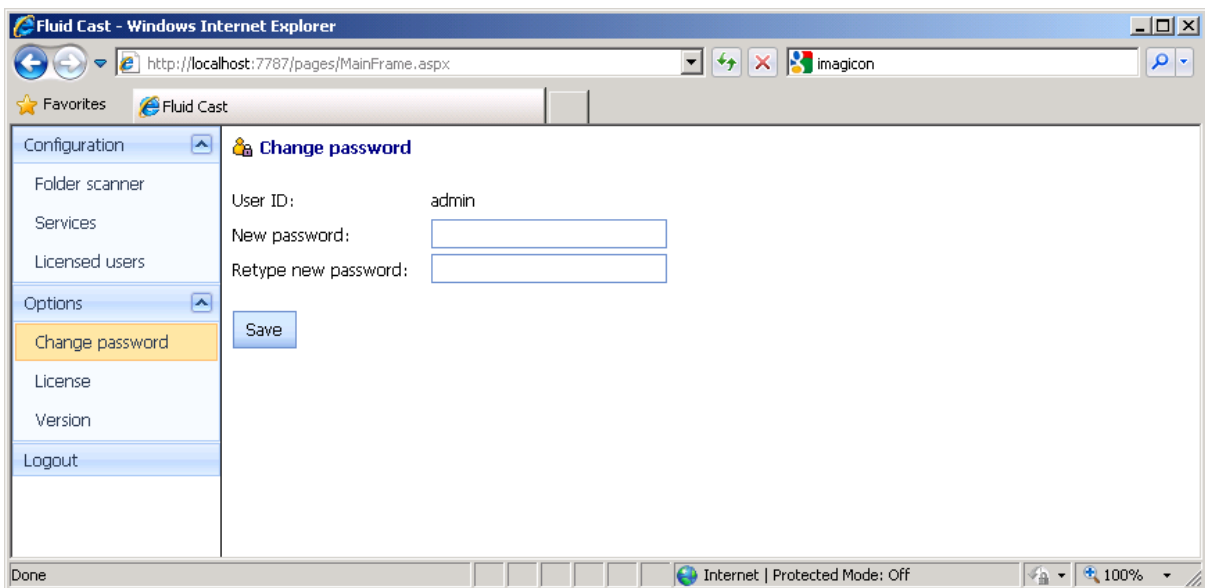


Screenshot 23 –Version information

Change Password

Change password

1. To change your existing password, click Change Password on the menu.
2. Set the following information:
 - New Password – The new login password of the current user.
 - Retype New Password – Key in the new login password of the current user again for confirmation.
3. Click **Save** to save the information.



Screenshot 24 – Change password

Logout

Logout

1. To logout, click Logout on the menu.

Troubleshooting

Troubleshooting

The following are the main sources of information available to users for troubleshooting:

- The manual – most issues can be solved by reading the manual.
- Contacting the Asprit technical support team by email at support@asprit.com.
- Contacting our technical support team by telephone.

Email support

The preferred way to contact the Asprit technical support team would be by email. You can send your email to support@asprit.com. We will answer your query within 24 hours or less depending on your time zone.

Phone support

You can contact the Asprit technical support team by phone. Please check our website for the correct numbers to call.