
Fluid Design 2.0

Manual

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Chapter 1 Introduction

About this manual

How is this manual structured

This manual is structured in line with the logical chain of configuration operations required to get Fluid Design up and running.

Chapter 1 gives an overview of Fluid Design

Chapter 2 explains how to successfully install Fluid Design

Chapter 3 getting started for Fluid Design

Chapter 4 describes how to configure the template

Chapter 5 getting help and FAQ

Glossary of terms used in this manual

PDF	Portable Document Format (PDF) is an open standard for document exchange. The file format created by Adobe Systems in 1993 is used for representing two-dimensional documents in a manner independent of the application software, hardware, and operating system
PDF Form Fields	A PDF Form Field object is an interactive element that can be manipulated by the user to change the value. The values can be saved and represented to the viewer.
Digital Signature	A digital signature is a mathematical scheme for demonstrating the authenticity of a digital message or document. A valid digital signature gives a recipient reason to believe that the message was created by a known sender, and that it was not altered in transit. Digital signatures are commonly used for software distribution, financial transactions, and in other cases where it is important to detect forgery and tampering.
Regular Expression	In theoretical computer science and formal language theory, a regular expression (abbreviated regex or regexp) and sometimes called a rational expression ^{[1][2]} is a sequence of characters that forms a search pattern, mainly for use in pattern matching with strings, or string matching, i.e. "find and replace"-like operations.

About Fluid Design

Fluid Design is a windows watching service that dynamically add signature fields into the targeted PDF without manual intervention. This is useful for system that produce PDF for signing and yet unable to include signature field themselves. It offers highly configurable options that can adjust into the various business flows.

Key Features

Graphical placing of signature fields to template

No XML. No coordinates. You can just drag and drop the signature fields onto the template.

Regular expression to read filename

You can specify filename's criteria to read in PDF selectively. Processing will only be done if the filename matches the regular expression.

Multiple templates based on ranking

Templates can be applied sequentially based on ranking. You can rank the templates based on their processing sequence.

Exportable template data

Template data can be exported to another Fluid Design machine without repeating the configuration again if multiple watching is required in a single organisation.

Feature rich post processing actions

After adding of signature fields, you can dictate the series of events that happen to the PDF. You can move it to another folder. You can prefix and suffix the filename and open up directly when done.

Options to process the PDF

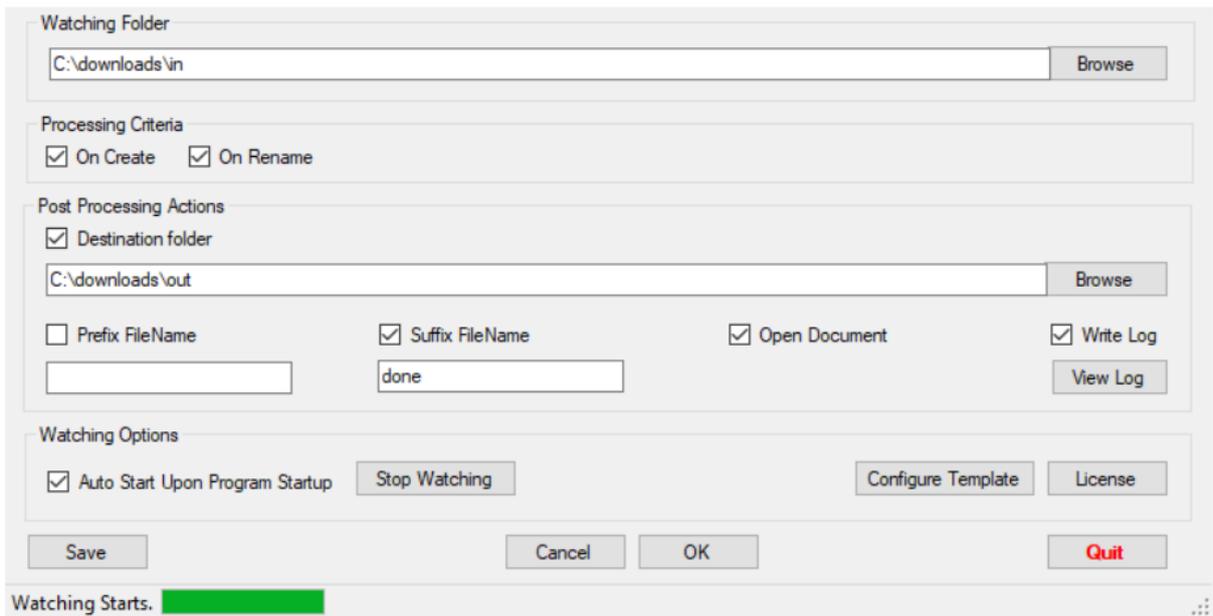
You can specify the events that start the processing. There are 2 events: On Create and On Rename.

Auto or manual start of watching

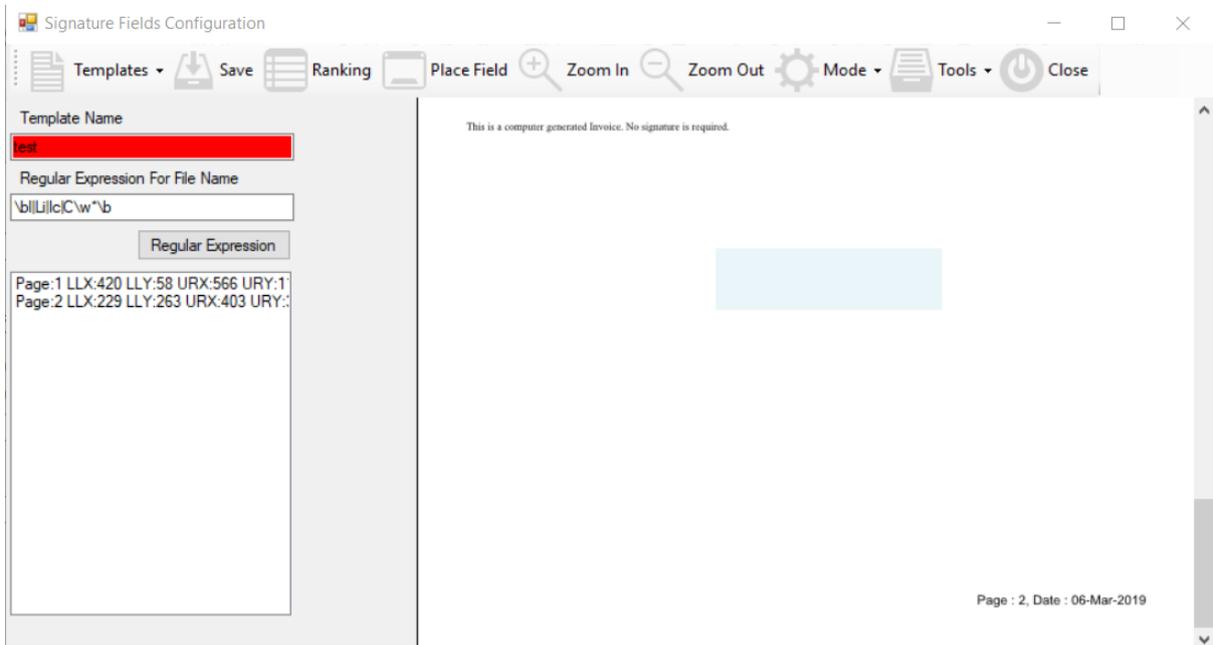
You can choose to auto start the watching upon program start up or manually activate the button.

Fluid Design At First Glance

Evaluation license expiring on 21 Jun 2019



Screenshot 1.1 - The Fluid Design Main Configuration Screen



Screenshot 1.2 – Graphical Signature Fields Configuration

Licensing

During evaluation all features within Fluid Design are available. Please contact our sales for a 30-day evaluation period. This license key can be activated during first installation.

Upon expiry, a license key must be purchased to be able to once again access Fluid Design features. Only one license key of Fluid Design is

required at any one time. The license key type indicates which features are to be activated.

NOTE: Fluid Design does not need to be uninstalled and reinstalled when entering a purchased license key.

Fluid Design is licensed per desktop installation.

Chapter 2 Installation

Introduction

Where can I install Fluid Design?

Fluid Design can be installed on any computer which meets the minimum system requirements irrespective of the location on your network. It works in all versions of Windows Operating System. It is also applicable to both 32 bits and 64 bits Windows system as in this point of writing.

Hardware requirements

Windows 2000/XP/2003/Vista/Windows 7/Windows 8 - Installation machine(s)

- Processor: 800 MHz or higher processor clock speed
 - RAM: 256 MB
 - Hard disk: 20 MB of available space
 - Others: Keyboard and mouse or compatible pointing device.
 - Both 32 bit and 64 bit
 - Full Windows OS
-

Software requirements

Software requirements - Installation machine(s)

- Windows 2000/XP/2003/VISTA/Windows 7/Windows 8
 - .NET framework 2.0 (32 bit / 64 bit accordingly)
-

Installation procedure

Fluid Design includes an installation wizard which will assist you through the installation process. To start the installation:

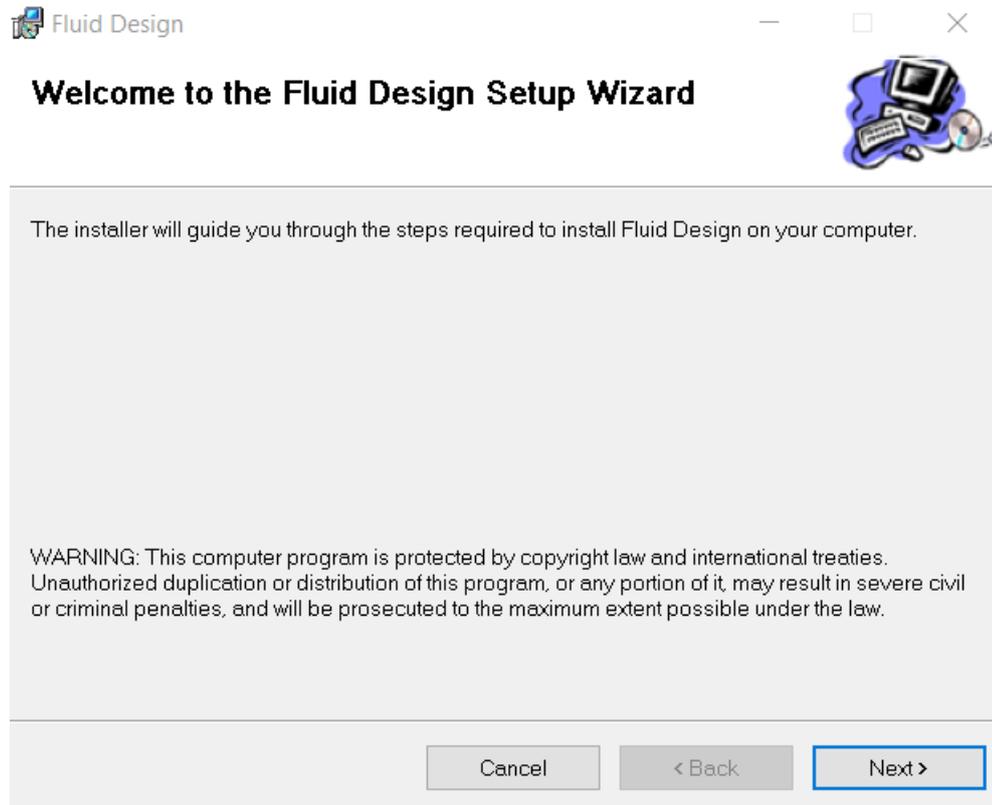
1. Close all running applications and log-on the target computer using an account which has local administrative privileges
2. Double-click on **setup.exe**.
3. If Fluid Design detects that the basic dependencies are not present, a dialog will outline the missing dependency or dependencies and you will be allowed to install the missing dependencies manually or automatically.
4. As soon as the welcome dialog is displayed, click **Next** to start the installation. Read the licensing agreement carefully. To continue installing

the product, select the '**I Agree**' option and click **Next**. (Screenshot 2.1, Screenshot 2.2)

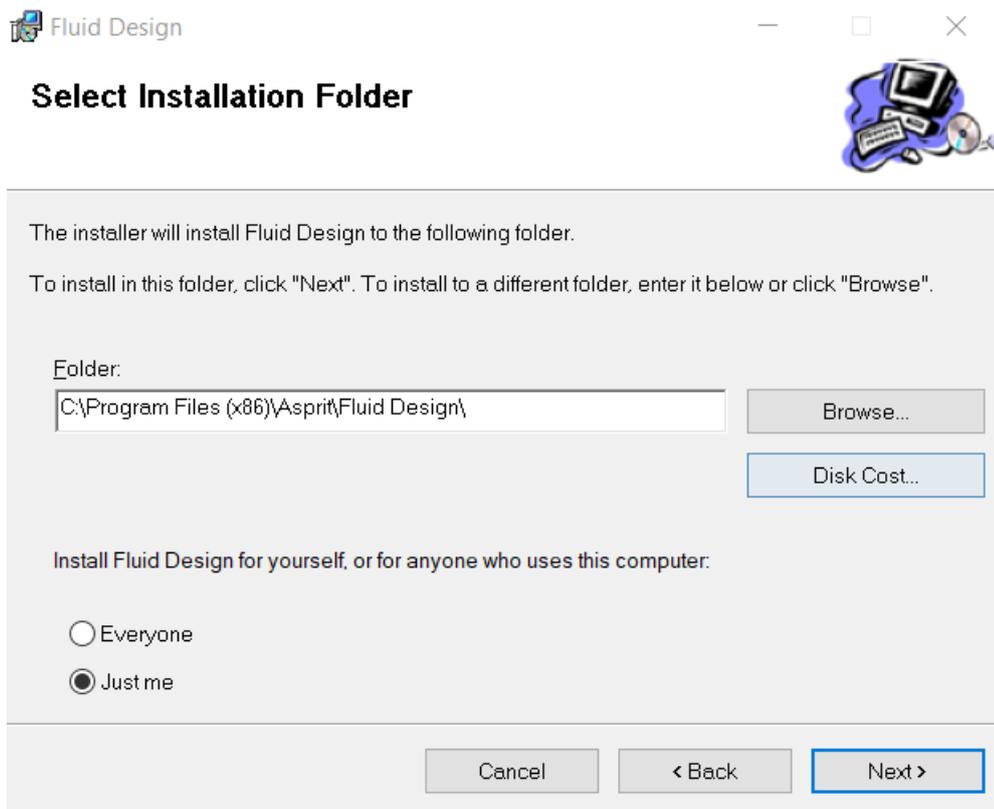
5. Specify an alternative installation path if you want to install other than the default path. Click **Next** to proceed with the installation. (Screenshot 2.4)

6. Click **Finish** to finalize the installation. (Screenshot 2.5)

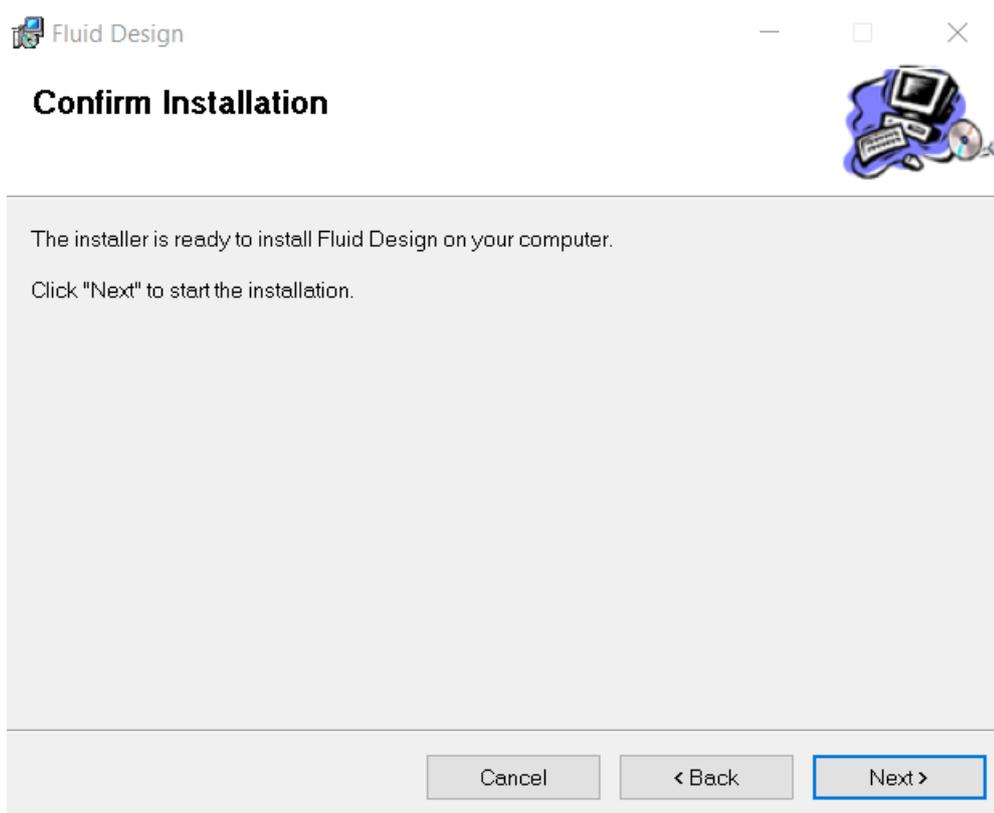
Screen Shots in Chronological Order



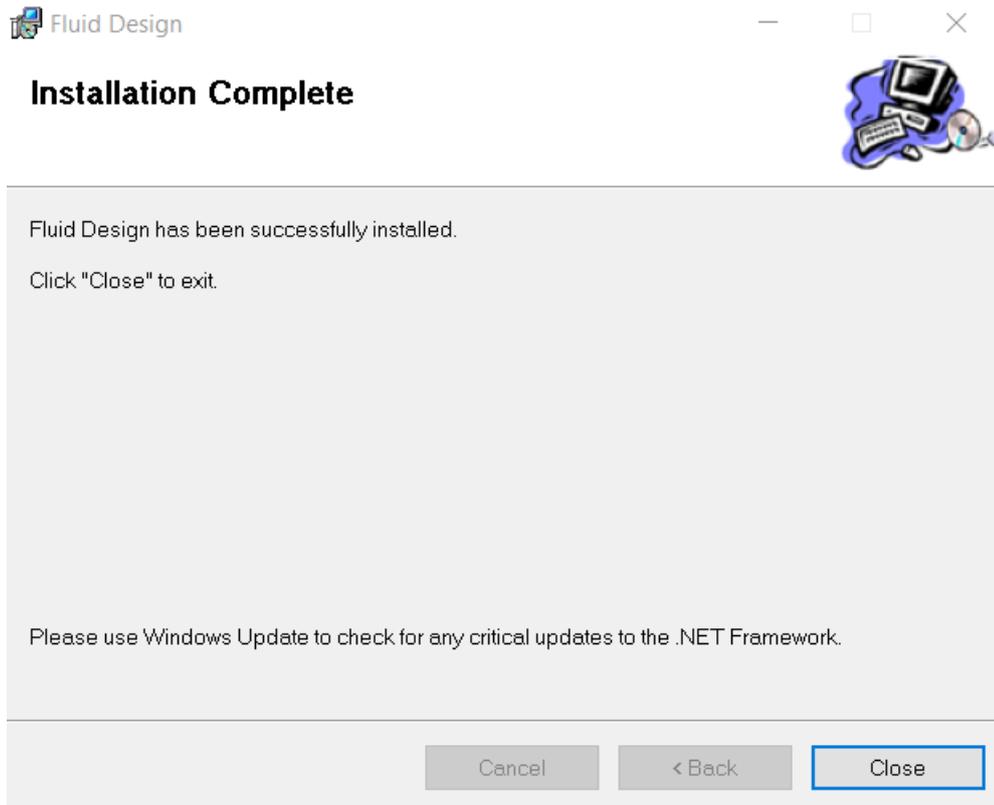
Screenshot 2.1 – Welcome screen



Screenshot 2.2 - Select Installation Folder screen



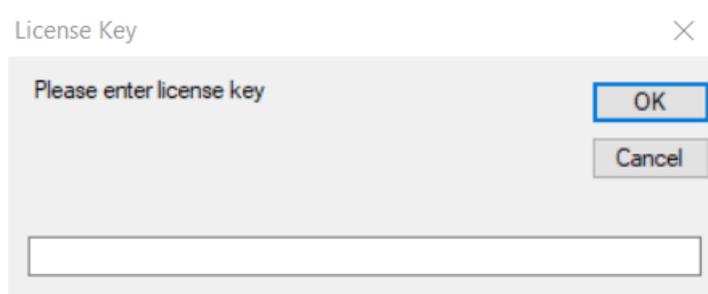
Screenshot 2.3 – Confirm Installation screen



Screenshot 2.4 – Installation of Fluid Design Completed

Chapter 3 Getting Started

License Configuration



Screenshot 3.1 – First Screen to Configure License

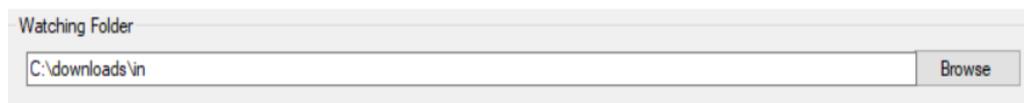
Please click the **License** button. The system would pop up a box as shown in Screenshot 3.1. If you have the license key, please enter the license key in the text box and click 'OK'. If you are evaluating the product, please get the 30 days license from us.

Getting Started

Start the program from the Windows Start menu by choosing Fluid PDF Folder and then Fluid Design or by double-clicking the shortcut program icon on the desktop.

Watching Folder

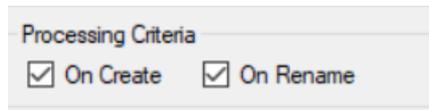
The folder where the source PDF is dropped into for processing. This needs to be a valid existing folder in the system. Click browse and you can select the watching folder.



Screenshot 3.2 – Folder to be watched for incoming documents

Processing Criteria

These are the file operation events that will trigger the Fluid Design to first notice the file.



Screenshot 3.3 – Files event that will trigger the process

On Create

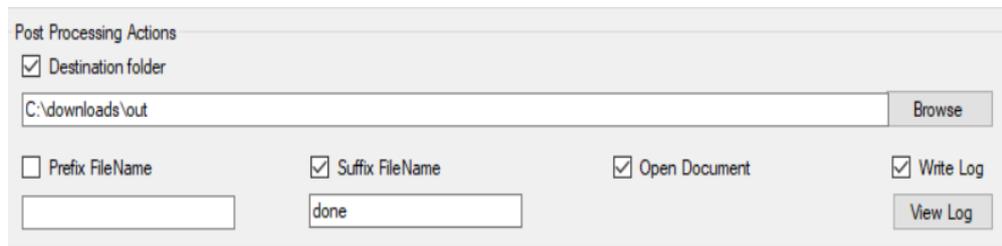
The first time that the PDF document appear in the folder and this will trigger the process to watch it whether the filename fits the criteria.

On Rename

If there is a rename of PDF document, it will trigger the process as well.

Post Processing Actions

Post Processing Actions refers to actions taken by the system after auto placing all the signature fields. Below are the actions that you can take:

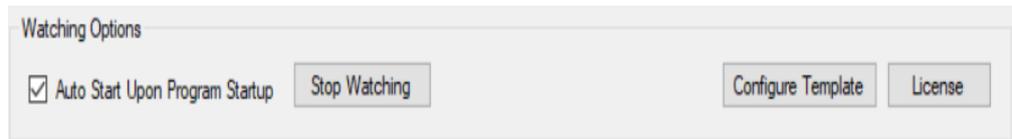


Screenshot 3.4 – Post processing actions

1. Prefix the filename
After the PDF document is processed, the filename can be prefixed with designated string set in the textbox.
2. Suffix the filename
After the PDF document is processed, the filename can be suffixed with designed string set in the textbox.
3. Destination Folder
After the PDF document is processed, the file can be moved to another designated folder. Select Browse for the destination folder.
4. Open Document
After the PDF document is processed->prefix if any->suffix if any->the document will be launched using the user associated PDF program.
5. Write Log
Log is written for debugging purposes.

Watching Options

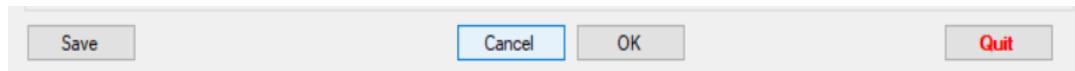
Watching Options refer to options needed to watch and configure the placement of the signature fields.



Screenshot 3.5 – Watching Options

1. Auto Start Upon Program Startup
The watching will immediate commence on the startup of the program if this is checked.
2. Button to Start/Stop Watching
If Auto Start is not checked, user need to click the Start/Stop Watching button to manually start or stop the process.
3. Configure Template
This button will link you to configure template for auto placement of signature fields. This module will be explained in greater details in Chapter 4 of the manual.

Miscellaneous Buttons



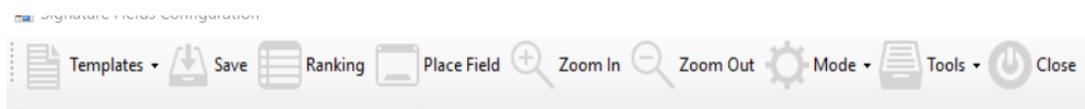
Screenshot 3.6 – Some of miscellaneous buttons

1. Quit Watching
This will totally quit the program and stop watching
2. Cancel
It will minimize the program without saving.
3. OK
It will minimize the program and save.
4. Save
It will save and refresh the program.
5. View Log
It will open up to operation log for debugging purposes.

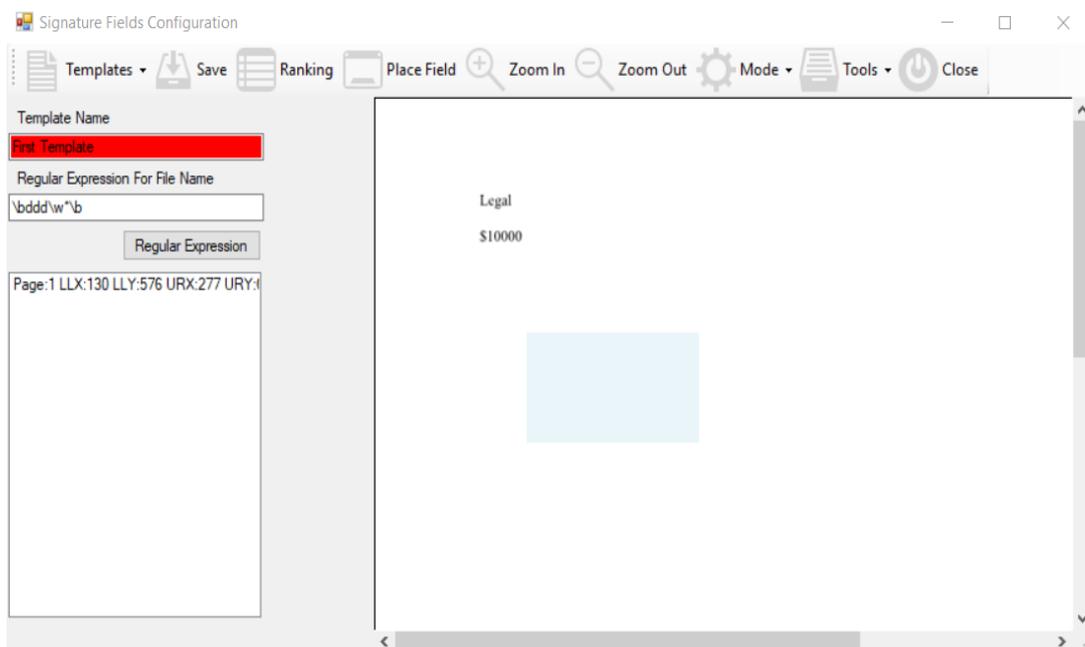
Chapter 4 Template Configuration

Introduction

This module is to place signature fields into the locations of a PDF template. This template will then be used to process incoming files that match the filenames determined by the regular expression.



Screenshot 4.1 – Menus for Template Configuration



Screenshot 4.2 – Working Area for Template Configuration

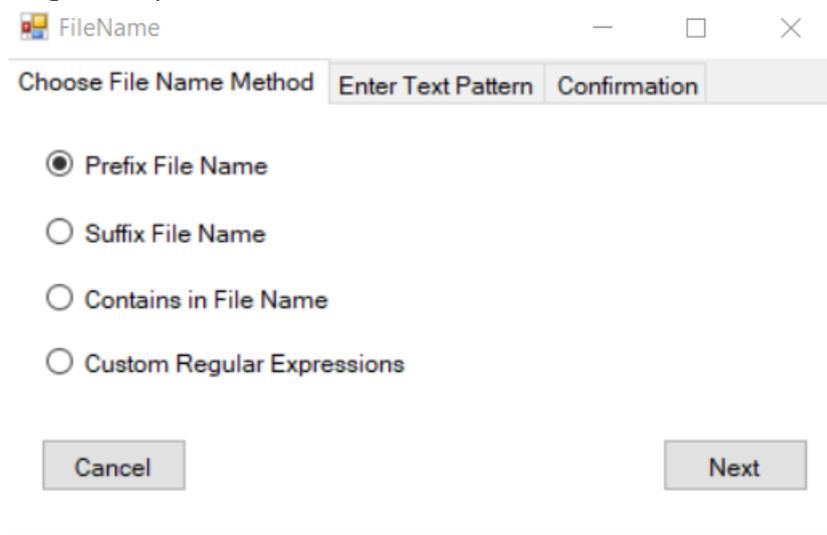
Templates

Choose This menu you can create a new template or to access existing templates if they are created before. Their template name will appear. Once new, it will prompt you a dialog to select a PDF document as template.

Template Name

You need to give a meaning unique name to identify your template

Regular Expression for Filename



The screenshot shows a dialog box titled "Regular Expression for Filename" with a window title bar "FileName". It has three tabs: "Choose File Name Method", "Enter Text Pattern", and "Confirmation". The "Choose File Name Method" tab is active and contains four radio button options: "Prefix File Name" (selected), "Suffix File Name", "Contains in File Name", and "Custom Regular Expressions". At the bottom, there are "Cancel" and "Next" buttons.

Screenshot 4.3 – Choosing File Name Method

You can choose 4 types naming method to identify your filename.

1. Prefix File Name

A word, letter, or number placed before the filename.

For example if LIC is the prefix, the corresponding filename would be LIC<filename>.pdf

2. Suffix File Name

A word, letter, or number placed after the filename but before the extension.

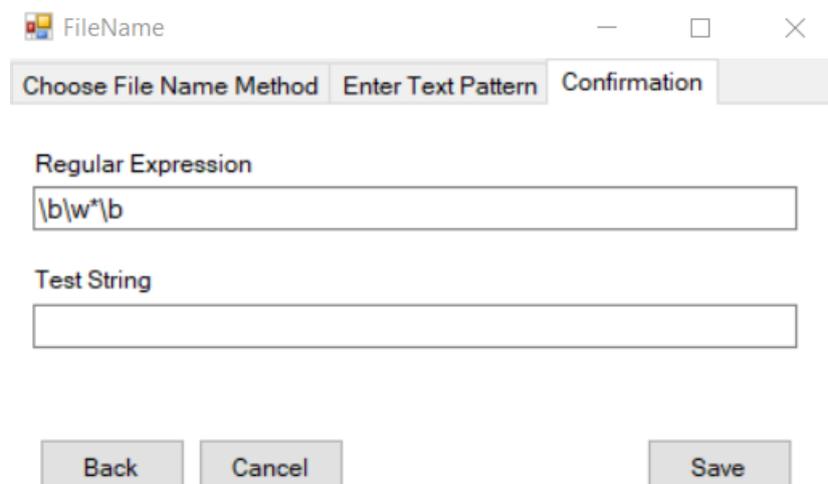
For example if LIC is the suffix, the corresponding filename would be <filename>LIC.pdf

3. Contains in File Name

Any word, letter or number appears in any sequence of the filename.

4. Custom Regular Expressions

You can directly enter any regular expressions to act as a criteria to match the filename.



The screenshot shows the same dialog box, but with the "Enter Text Pattern" tab active. It features a "Regular Expression" input field containing the text `|b|w*b`, a "Test String" input field which is currently empty, and three buttons at the bottom: "Back", "Cancel", and "Save".

Screenshot 4.4 – Regular Expression to detect filename

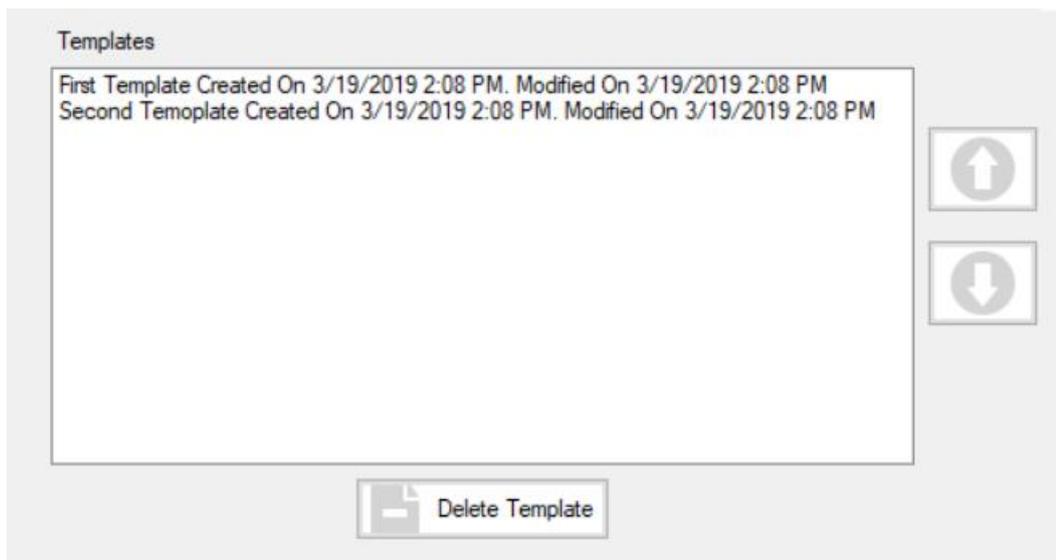
Save

A function to save the currently working template.

Ranking

Fluid Design provides priority to the templates. The templates higher up in the ranking will be applied first followed by the lower ranking templates.

In this module, you can shift up and down the ranking by clicking the right arrows button. You can also opt to delete the template.



Screenshot 4.4 – Ranking of the Templates

Place Field

Fluid Design provides the ability to place signature fields to a PDF document. Once it is selected, you can drag to a rectangle and place it anywhere in the document. The location will be displayed on the left hand list once it is placed.

Zoom In / Out

Fluid Design provides the feature to zoom in and out of the PDF document.

Mode

Fluid Design allows the cursor to perform two operations:

1. Pan and Scroll
Allows you to pan or scroll in a document or item by moving the pen tip up and down or right and left. When you select **Pan and Scroll**, the Scroll Speed window appears.

2. Edit Field
Allows you to select a signature field so that you can resize, reposition or delete the field.

Tools

Fluid Design provides the ability to import or export template configuration data.

Chapter 5 Getting Help

Reaching for support

You can reach us at the following contacts for support

- Email: support@isagecomm.com
- Phone: 65 68467882
- Fax: 65 62707205

FAQ

1. Why is Fluid Design unable to install?

Answer:

Please check the following:

- a. Is Fluid Design already installed in the desktop? Only one installation is allowed per PC.
 - b. Do you have administrator rights in the desktop you are going to install?
2. What is Regular Expression?

Answer:

Regular Expression is a sequence of characters that forms a search pattern, mainly for use in pattern matching with strings, or string matching, i.e. "find and replace"-like operations.

