



Document Check Out Utility Desktop App

What is it?

Document Check-Out Utility is a Desktop Application that can be installed on your computer to make editing and checking-out Document within Claromentis with version control much easier.

Your browser doesn't support video.
Please download the file: [video/mp4](#)

How to enable it?

Document Check-Out Utility is in Claromentis 8.6.7+ and 8.7.6+

If you wish to enable this option on your system, a user with access to Document Admin Panel can enable this feature from [Admin > Documents > General Configuration](#)

Admin / Documents

Checked out documents	Document name	Checked out by
	1.jpg	Michael Christian

ERMS features

- Off Use ERMS records (ERMS_CONFIG_RECORD)
- On Use ERMS markers (ERMS_CONFIG_MARKERS)
- On Use record types (ERMS_CONFIG_RECORD_TYPES)
- On Use multi-component documents (ERMS_CONFIG_MULTICOMPONENT_DOCUMENT)
- On Use 'security levels' in permission system (ERMS_CONFIG_SECURITY_LEVEL)
- On Use MD5 signature for documents (ERMS_CONFIG_MD5_SIGNATURE)
- On Use export/import for ERMS objects (ERMS_CONFIG_EXPORT_IMPORT)
- On Use ERMS schedules (ERMS_CONFIG_SCHEDULE)
- On Use Google drive links (ERMS_CONFIG_GDOC_LINKS)
- On Use Microsoft OneDrive links (ERMS_CONFIG_ONEDRIVE_LINKS)

Statistics

Number of Documents	9057
Number of all versions of documents	10182
Number of checked out documents	1

Documents

- Manage documents list

Utilities

- Documents import
- Documents export
- Trash can
- Documents reports
- Documents permissions report

Configuration

- General configuration**
- Metadata
- Record types
- Templates

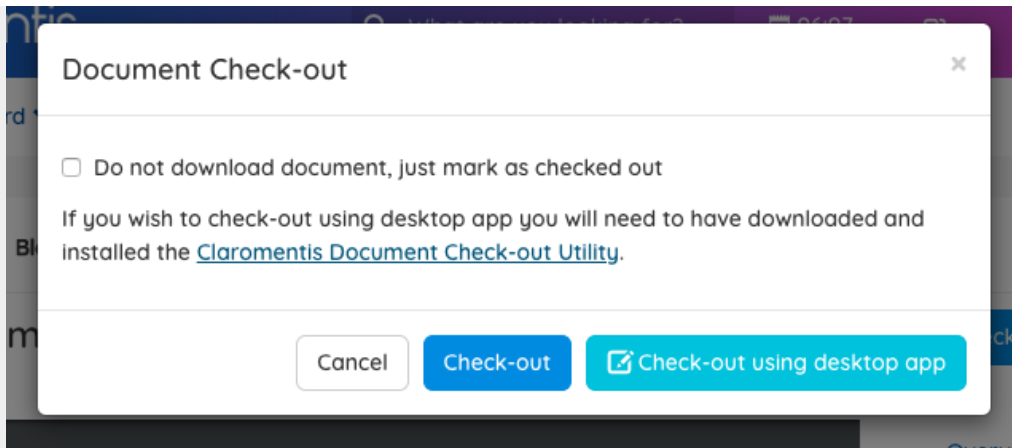
Scroll down and set this option to "Yes"

Users will be presented option to check out document through Document Check Out Utility desktop application

Yes No

Save Configuration

Once this option is enabled, there will be an additional button in the Document Check-Out Modal Window, allowing the user to download the app (if they using it for the first time) or check-out document using desktop app.



Downloading and Installing Document Check Out Utility App

Step 1 - Download the app

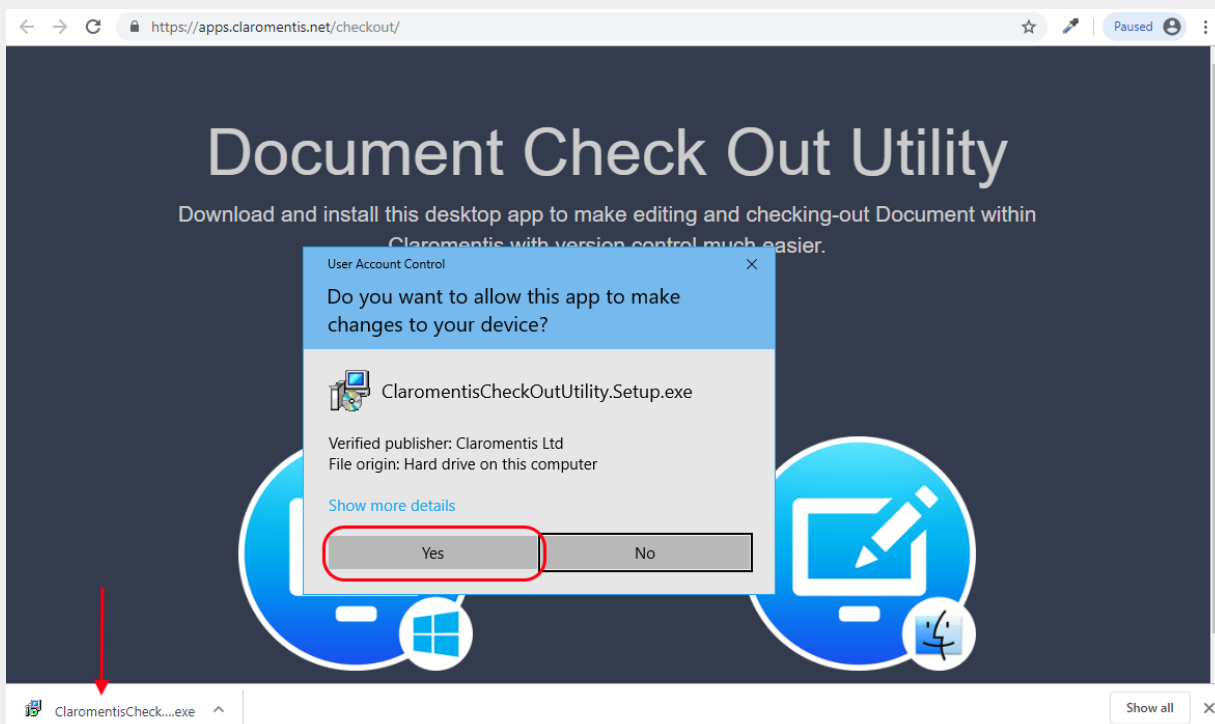
You can download the Document Check-Out Utility app when prompted for the first time or by going to

<https://apps.claromentis.net/checkout/>

Select the appropriate version (for Mac or Windows) to begin the download.

Step 2 - Installing the app

Once it has been downloaded on your local computer click the file to run the install process

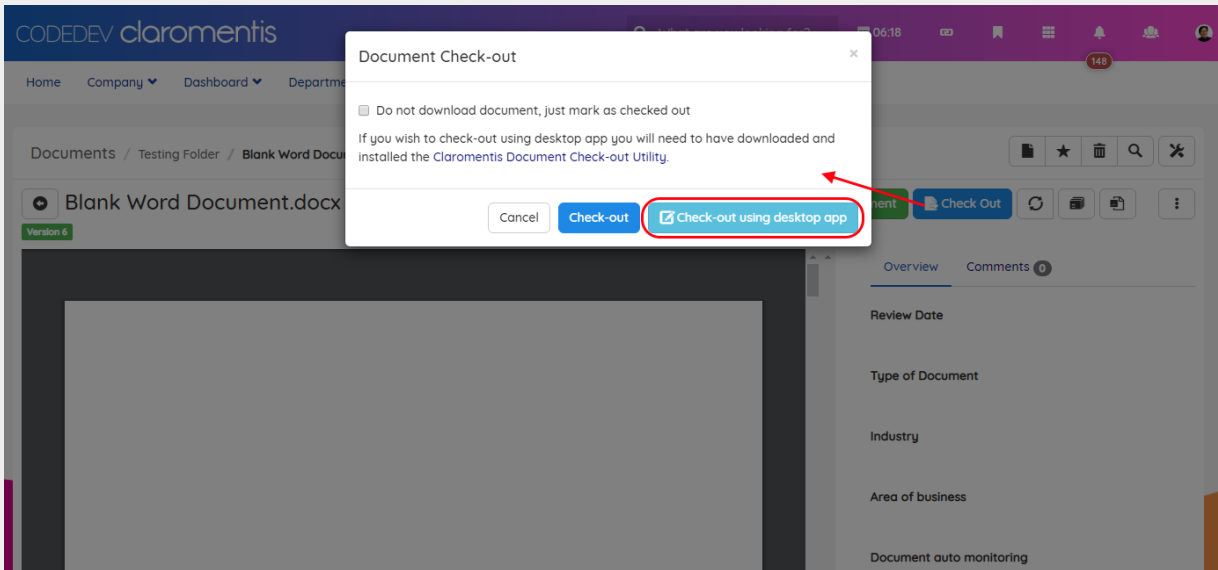


Once the installation is complete you're ready to use.

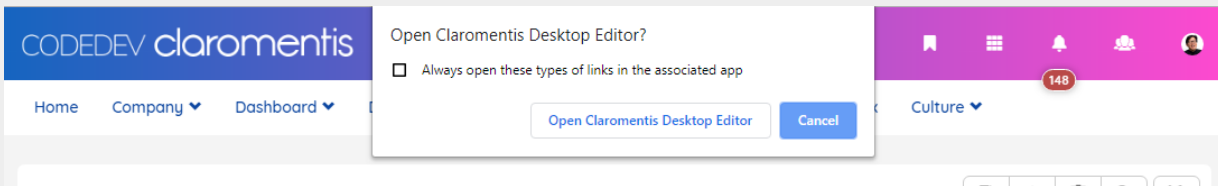
How to check out the document using the app

Step 1: Check out the document

Follow the standard process of checking out the document, when prompted select **Check-out** using desktop app

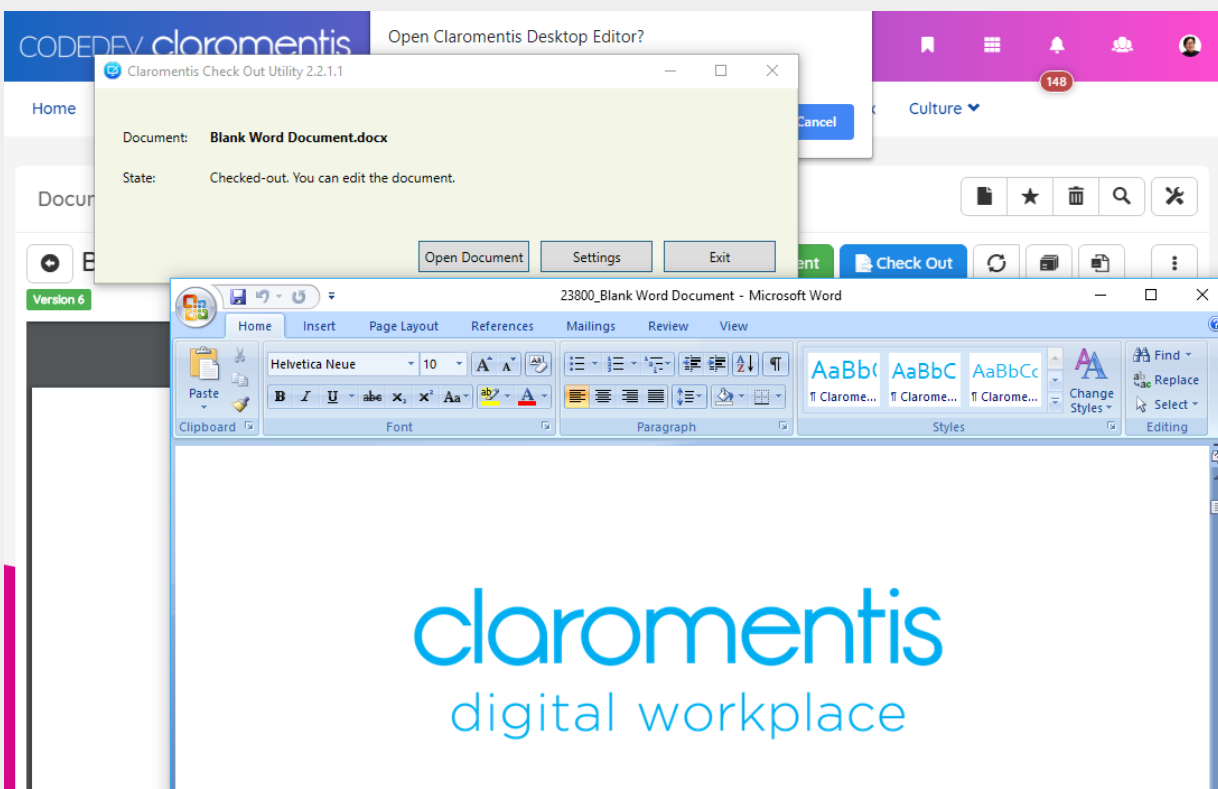


Click **Open Claromentis Desktop Editor** when prompted.



Step 2: Making changes in native app

The app will begin the download process to a temporary location. Once the download is completed if you have an app associated with the file, for example, **Microsoft Word** for .docx type of file, it automatically opens the app so that you can begin making changes.

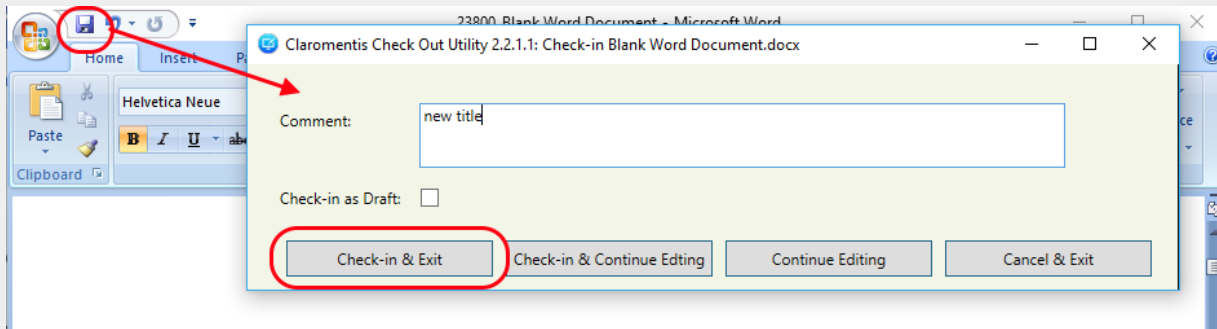


If you don't have an app associated with the file, your operating system is going to ask.

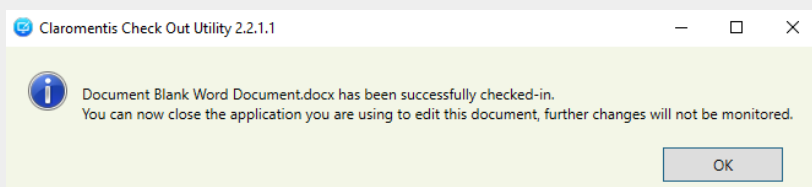
Document Check-Out utility works with various file type depending on what application is available on your computer, for example, you may have .PSD file that you can edit using Adobe Photoshop or .DWG file in which you can edit using AutoCAD.

Step 3: Saving Your Changes

When you save the document the app is aware of this and prompt you if you wish to check-in the document back. You can add version comments in the window provided below.



Check-in & Exit - Check-in and save the document back onto the server, you can safely exit the app you are using, further changes you've made on the app won't be monitored.



Check-in & Continue Editing - Check-in and saving the document onto the server but you wish to continue making changes locally, in which later you can check them in again.

Continue Editing - The document is only saved locally (not uploaded to the server).

Cancel & Exit - Cancel the editing process, any changes won't be saved.

FAQs

Can I edit the document without downloading the app?

Claromentis Document Check-Out utility is designed to make the process of checking out and checking in document easier, it works with the same principle of checking out the document by downloading it to your computer so that you can edit the document and later you can check them back in online by automating most of the process for you.

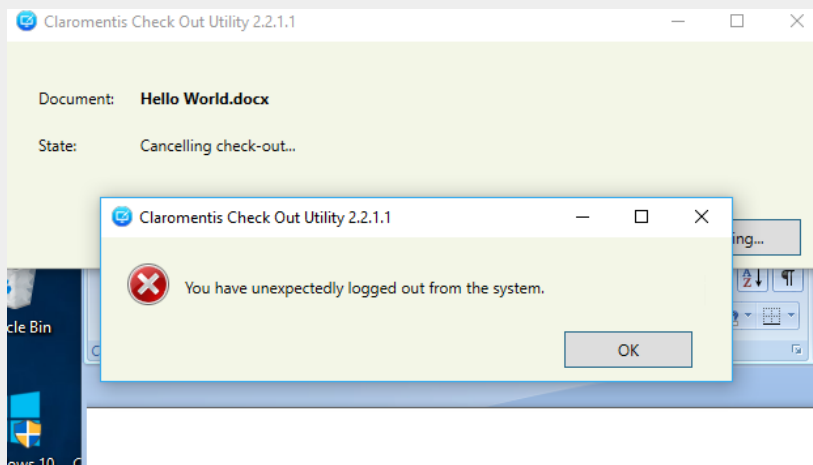
Learn more about [Editing a Document and Version Control](#)

How secure is checking out the document using this utility?

Claromentis Document Check-Out Utility is leveraging [Claromentis Document REST API](#) to automate process of downloading document and re-uploading document back with version control.

The user is authenticated securely through session token by monitoring active session when the user is

logging in on the system. If the user is no longer logged in onto the system then the document cannot be checked-in.



Will it work with 2-factor authentication?

Yes, the Document Check-Out utility works with 2 factor authentication enabled.

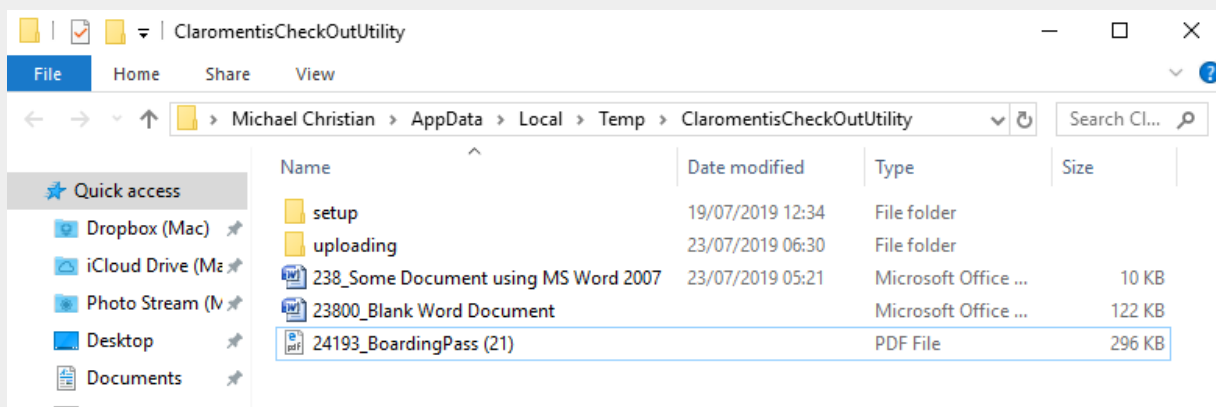
Will it work on mobile?

No, Document Check-Out utility only available on Desktop Computer (Mac) and Windows.

Where the temporary files are stored?

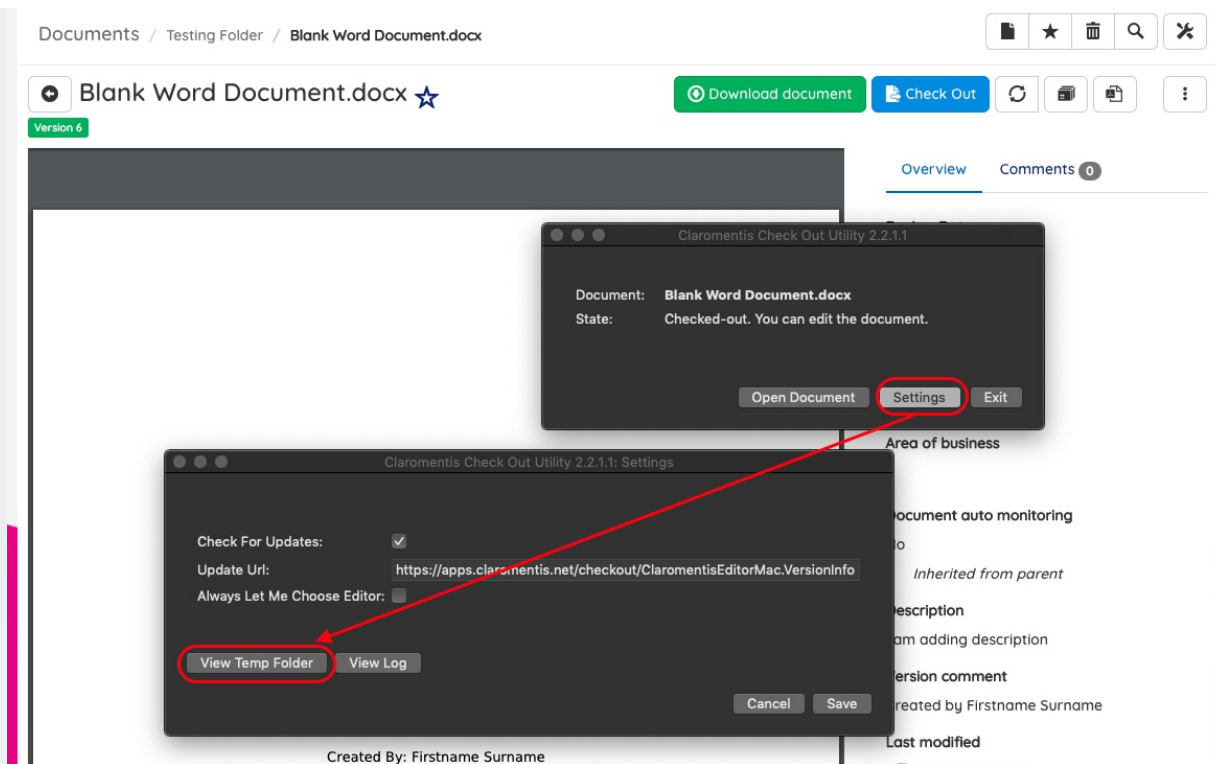
In Windows, it is located at

[Username] > AppData > Local > Temp > ClaromentisCheckOutUtility



On Mac the location of the Temp Folder is varied, on Mac or Windows you can also access Temp Folder by going to

Settings > View Temp Folder



Upon a successful check-in, the file in the temporary location will be deleted.

I heard about Adobe Air application called Claramentis Online Document Editor ?

[This app](#) is no longer supported due to old technology and security implications. We would encourage users to use Document Check-Out Utility instead.

Related Article

[Editing and Version Control Document](#)

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