Donwload for Windows

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Document Check Out Utility Desktop App

Archived

What is it?

The Document Check-Out Utility is a Desktop Application that can be installed on your computer to make editing and checking out Documents 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 administrator access to the Document Admin Panel can enable this feature from `Admin > Documents > General Configuration`

Scroll down and set this option to "Yes"

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 documents using the desktop app.
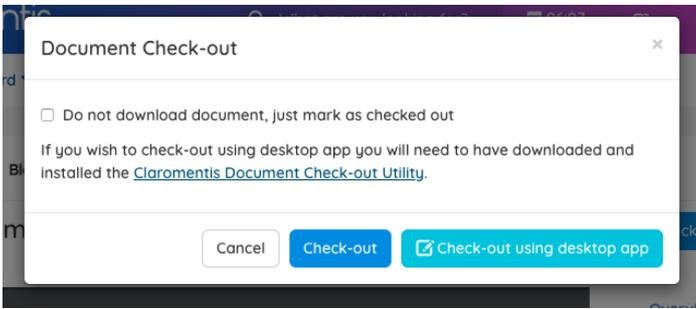
Downloading and Installing Document Check-Out Utility App

Step 1 - Download the app

You can download the Document Check-Out Utility app when prompted for the first time or by going to
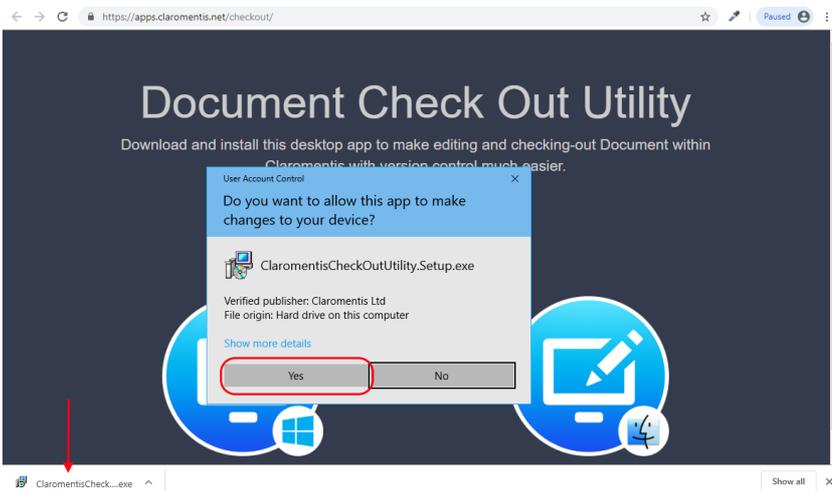
https://apps.claromentis.net/checkout/

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
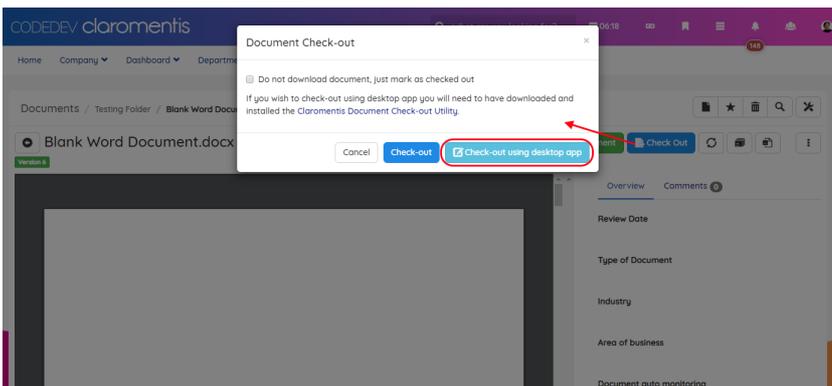

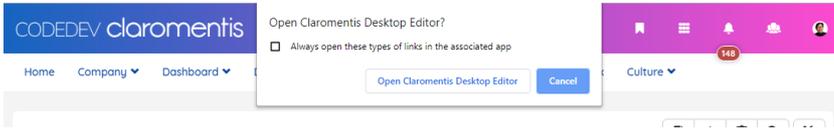Once the installation is complete you're ready to use.

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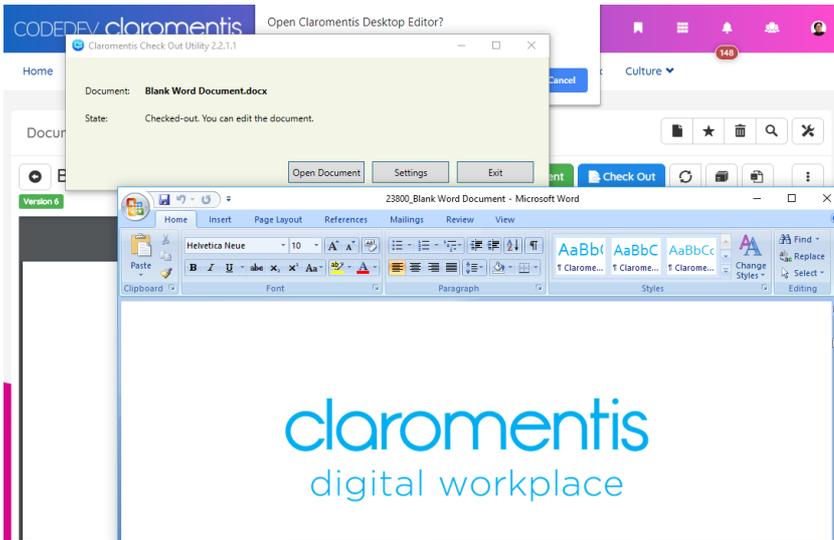
Click **Open Claromentis Desktop Editor** when prompted.

Step 2: Making changes in the 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 types 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 will prompt you to ask if you wish to check in the document.

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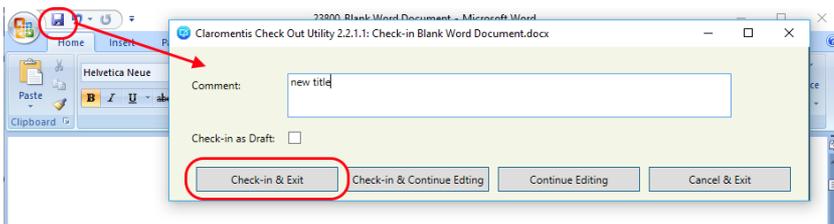
Check-in & Exit - Check in and save the document back onto the server, you can safely exit the app you are using, further changes you've made on the app won't be monitored.

Check-in & Continue Editing - Check in and save 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 documents 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 the process of downloading documents and re-uploading documents back with version control.

The user is authenticated securely through a session token by monitoring the active sessions when the user is logging in to the system. If the user is no longer logged in to the system then the document cannot be checked-in.
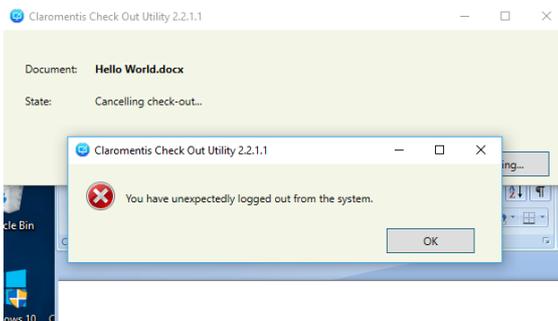
Will it work with 2-factor authentication?

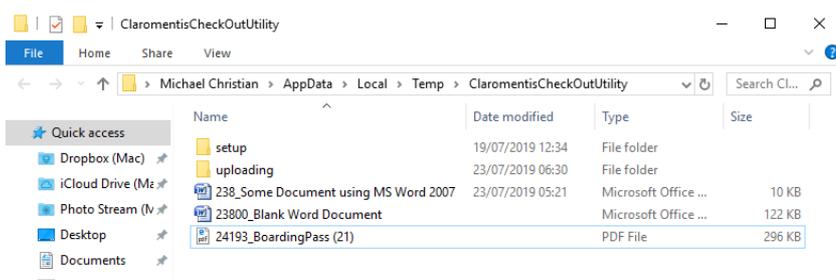Yes, the Document Check-Out utility works with 2-factor authentication enabled.

Will it work on mobile?

No, the Document Check-Out utility is only available on Desktop Computer (Mac) and Windows.
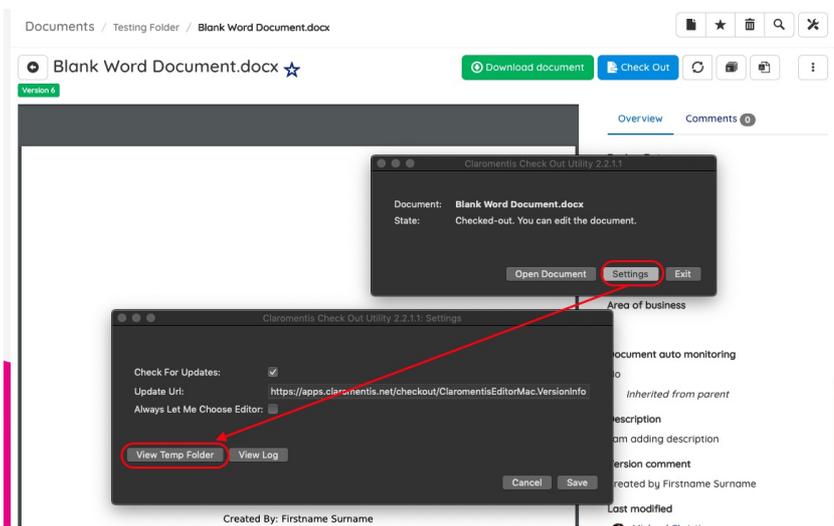
Where the temporary files are stored?

In Windows, it is located foolowing the pathway shown below:

```
[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 successful check-in, the file in the temporary location will be deleted.

I heard about an Adobe Air application called Claromentis 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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