

Check In/Check Out in Web Access 7.2

White Paper

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Laserfiche®

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Laserfiche Web Access 7.2 includes support for Check In/Check Out, an electronic document management feature that allows users to check out and modify an electronic document. Check In/Check Out uses persistent locks to maintain a particular user's hold on an electronic document. A persistent lock is a lock on an electronic document that remains in place until it is deliberately released. The lock is not broken by closing the document, losing your connection to the repository, or closing Web Access. It remains until you undo your check out, check the document back in, or have your check out undone by an administrator. While you have a document checked out, other users can view it, but cannot modify it; when you check it back in, your changes are applied to the repository, and the document becomes available to other users for modification.

For information about other new features in Web Access 7.2, see [New Features in Web Access 7.2](#).

How Check In/Check Out Works

Electronic File Storage

When you check out a document, the electronic file will be copied to your hard drive. You can then work with the local copy rather than the server copy. This allows you to complete your revisions before making them final and public, and also gives you the ability to discard your changes if you decide that you do not wish to keep them. It also allows you to open the document for editing without logging in to Web Access.

When you check in your document, the modified version on your hard drive will be imported to Laserfiche, and you will have three options: save the modified document as a new version, save the modified document as a new document, or overwrite the document in the repository with your modified document. For more information on versions, see the [Versions and Version Groups](#) white paper. If you undo your check out, the existing document in the repository will not be changed.

Metadata Caching

When one user has a document checked out, other users will be unable to modify the document's template fields, add or remove tags from the document, change the version group of the document, or add other documents to the document's version group. The user who has the document checked out can make these changes. If the user who has checked out the document edits its fields or tags, however, the modifications to the metadata are cached locally and applied to the Laserfiche repository only when the document is checked back in. Changes to the links and version group are applied immediately, since they also affect other documents in the repository.

When one document has been checked out from a version group, no other documents in that version group can be checked out. All users can modify the document links of a checked out document, and can remove other documents from that document's version group.

Checked Out Documents in the Folder Browser

Documents that have been checked out have a unique icon, so that you can tell at a glance that they are checked out. A document that you have checked out will be marked with a small pencil in the bottom right corner of the electronic document icon. A document that has been checked out by another user will be marked with a small red check in the bottom right corner of the icon.



Figure 1: The checked out document icons. Left: Document you have checked out. Right: Document checked out by another user.

"Check Out Owner" has been added to the list of available browser columns, allowing you to tell at a glance what user has checked out the document.

Check Out Details

You can view additional details about a checked out document by right-clicking the document and selecting **Check Out Details**, or by opening the **Action** menu and selecting **Check In/Check Out** and then **Check Out Details**. The **Check Out Details** dialog displays the user who checked out the document, the time it was checked out, and any check out comments.

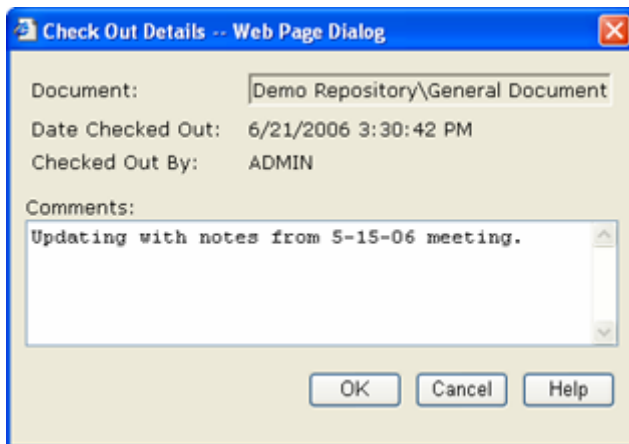


Figure 2: The Check Out Details dialog.

Checked Out Documents Search

You can locate the documents checked out by a particular user using the Checked Out Documents search. This search will return all documents checked out by the specified user. The search can be combined with other

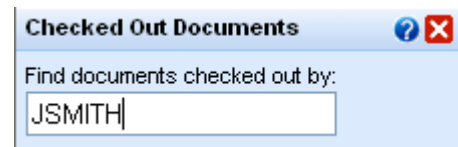


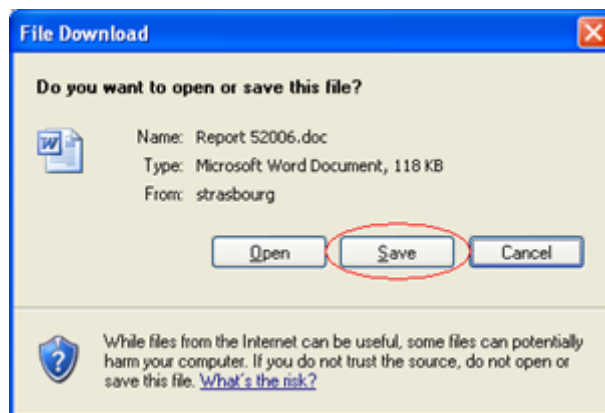
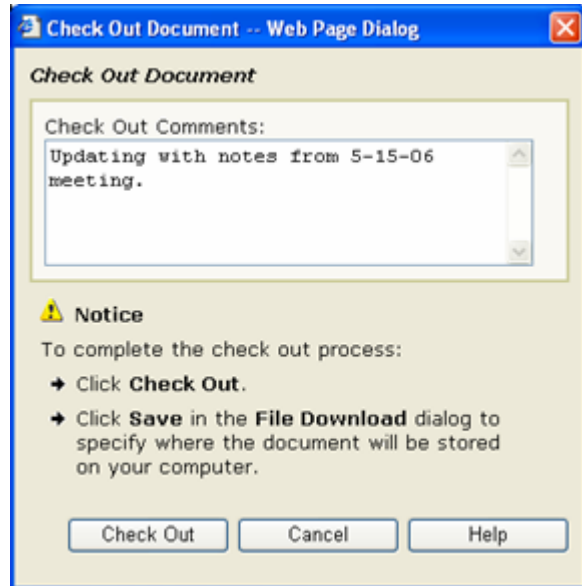
Figure 3: The Checked Out Documents search.

searches – for instance, if you wanted to locate all documents checked by the user JSMITH and containing the keyword 'authorization,' you could combine a Checked Out Documents search and a Full Text search.

Step-By-Step Guide

How To Check Out a Document

1. In Web Access, select the electronic document you wish to check out.
2. In the **Action** menu, select **Check In/Check Out** and then **Check Out**, or right-click the document and select **Check Out**. This will open the **Check Out Document** dialog.
3. In the **Comments** option, type any comments you wish to make about the check out. Check out comments are optional.
4. Click **Check Out**.
5. You will be prompted to open or save the document. Save the document to your hard drive. Be sure to remember the location to which you saved the document, as you will need to locate the document again to modify it or check it in.



How to Work with Your Checked Out Document

Once you have checked out a document, you will have a copy of that document stored on your computer. You should make modifications to that copy; it is the copy that you will upload when you check the document back in. If you open the electronic document from Web Access, you will see the original document, without any modifications you made to your local copy. You will be able to modify the document's metadata; see "Metadata Caching," above, for more information.

How To View What Documents You Have Checked Out

Users can view all of the documents they currently have checked out from a single dialog. This can help you manage many checked out documents, or quickly locate a document you want to work with or check in. To view the documents that you have checked out, open the **Tools** menu and select **Checked Out Documents**. From this dialog, you can double-click a document to open it directly, or use the buttons on the right to check it in, undo its check out, or view its details.

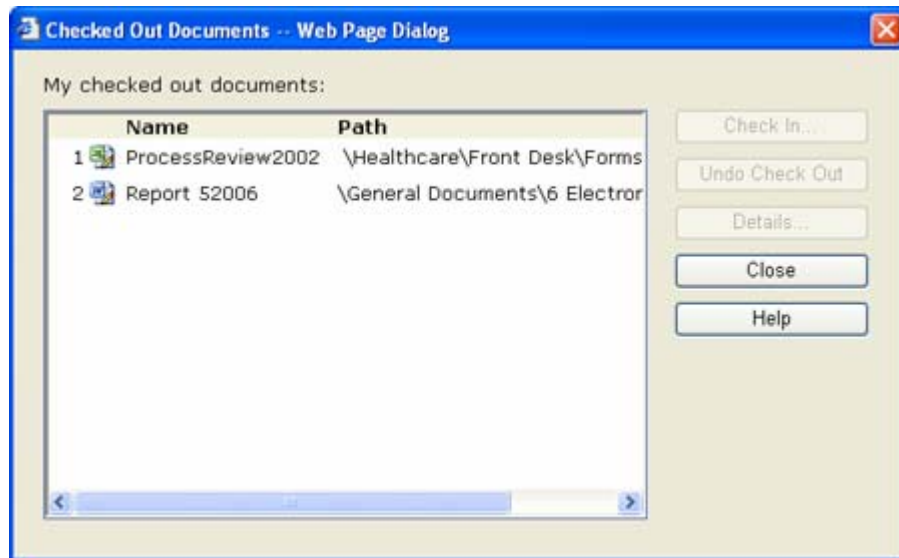


Figure 4: The Checked Out Documents dialog.

How To Undo A Check Out

Undoing a check out releases the lock on the document and its metadata without making any changes to the document in the Laserfiche repository. You can always undo a check out for your own documents.

To undo a check out

1. Select the electronic document whose check out you wish to undo.

2. Right-click the document and select **Undo Check Out**, or open the **Action** menu and select **Check In/Check Out** and then **Undo Check Out**.

How To Check In a Document

Checking in a document releases your lock on the document and its metadata, and applies the changes you made to the repository.

To check in a document

1. Select the electronic document that you want to check in.

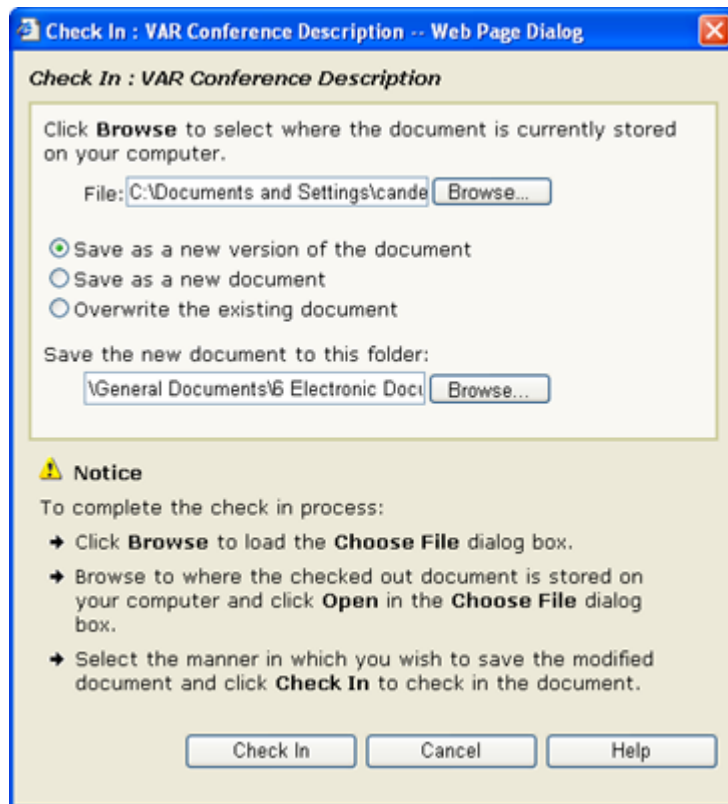
2. In the **Action** menu, select **Check In/Check Out** and then **Check In**. This will open the **Check In** dialog.

3. Click the **Browse** button, and navigate to the location on the hard drive where the modified copy of the document has been stored.

4. Choose whether you want to **Save as a new version of the document**, **Save as a new document**, or **Overwrite the existing document**.

If you save the document as a new version, the check out comments will become the default version comments.

5. Optionally, type or browse to another destination folder under **Save the new document to this folder**. By default, this will contain the path to the folder containing the original document.
6. Click **Check In**.



Administering Check In/Check Out Information

Administration for Check In/Check Out is handled by the Laserfiche Administration Console, which can be installed from the Laserfiche Client installation. If you will be administering Check In/Check Out frequently, you may wish to install the Administration Console.

Viewing Which Documents are Checked Out

In the Administration Console, you can view the documents in the repository that are currently checked out. The documents are listed in the **Checked Out Document** item, which is under the **Current Activity** item. You can see the path to the document, the user who checked it out, when it was checked out, and the check out comments. You can also undo the check out from this node.

Undoing Another User's Check Out

Administrative users who have the Manage Entry Access privilege can undo the check out on other users' checked out documents. This is generally useful in situations where documents would remain locked for a longer than necessary time. For instance, a user might check out a document and then go on vacation without checking the document back in. In the meantime, other users might need to work with the document. The administrator could then choose to undo the check out, making the document available again.

To undo a check out from the Laserfiche Administration Console

1. Select the document in the **Checked Out Document** node of the Laserfiche Administration Console.
2. From the **Action** menu, select **Undo Check Out**.

Security Considerations

Users need certain rights to perform Check In/Check Out actions. The table below describes the entry access and volume rights necessary for the various Check In/Check Out actions.

Tip: If you want your users to always save changes as a new document or new version rather than overwriting the original document – for instance, if you want to be able to compare and track all changes – you can deny the Modify Contents right on the document itself but allow the Create Document right on the folder.

Check Out Process	Required Rights
Check Out document	Read entry access right and Read volume right on document.
Check In as New Document	Create Document entry access right on destination folder and Create Documents volume right on destination volume.
Check In as New Version	Create Document entry access right on destination folder and Create Documents volume right on destination volume.
Overwrite Existing Document	Modify Contents entry access right on existing document and Modify/Delete volume right on existing document's volume.
Undo Your Own Check Out	No rights required.
Undo Another User's Check Out	Access Control Entry Access Right on checked out document and Read volume right on checked out document's volume, or Manage Entry Access privilege to undo the check out of any document in the repository.



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