

Oracle® Universal Content Management

Check Out and Open Administration Guide

10g Release 3 (10.1.3)

March 2008

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Introduction

This section covers the following topics:

- ["About Check Out and Open"](#) on page 1-1
- ["Server Requirements"](#) on page 1-1
- ["Client Requirements"](#) on page 1-1

1.1 About Check Out and Open

Check Out and Open is an optional extra for Content Server that enables users to check out and open content items in WebDAV-compliant applications directly from the content server.

1.2 Server Requirements

The content server must meet the following requirements:

- Content Server version 10gR3 installed and running
- CoreWebdav component installed and enabled

1.3 Client Requirements

Each client computer must meet the following requirements:

- Windows 2000 (with Service Pack 1 or later), Windows XP (with Service Pack 2), or Windows Vista
- Microsoft Internet Explorer version 6.0 or higher, or Firefox 1.5 or higher (with the Sun Java plug-in)

Important Considerations

- An ActiveX control is used for Internet Explorer browsers to provide the Check Out and Open functionality, and a Java applet for non-IE browsers (such as Firefox). See ["Manually Installing the Check Out and Open ActiveX Control on Client Computers"](#) on page 2-3 if the ActiveX control cannot be installed on client computers automatically. This may be the case if user environments in an organization do not allow downloaded ActiveX controls to be installed or users do not have administrator privileges on their computers. This limits the ability for individual users to install client software or allow downloaded controls to be installed.

- The Sun Java plug-in is part of the Sun Java Runtime Environment (JRE), which can be downloaded from <http://www.java.com/en/download/>.
- The Check Out and Open feature uses WebDAV to open and edit files unless ODMA Client (part of Desktop Integration Suite) is present on the client computer. If ODMA is installed on the client and the content item can be opened in a native ODMA application, then ODMA is used for the Check Out and Open process. If this behavior is not desirable and you prefer to use WebDAV instead, we recommend removing the server entry from ODMA or uninstalling ODMA altogether.

Installing Check Out and Open

This section covers the following topics:

- ["Installing the Check Out and Open Component on the Content Server"](#) on page 2-1
- ["Manually Installing the Check Out and Open ActiveX Control on Client Computers"](#) on page 2-3

See ["Client Requirements"](#) on page 1-1 for the requirements that client computers need to meet to use the Check Out and Open functionality.

2.1 Installing the Check Out and Open Component on the Content Server

System administrators need to install the Check Out and Open software on the content server before users can check out and open content items in a WebDAV-compliant application directly from the content server.

The Check Out and Open software is provided as a standard Content Server component called *CheckoutAndOpenInNative.zip*, which is located in the `\packages\allplatform\` directory of the Content Server software distribution package.

You can install the Check Out and Open component in two ways:

- ["During the Content Server Software Installation"](#) on page 2-1
- ["After the Content Server Software Installation"](#) on page 2-2

2.1.1 During the Content Server Software Installation

Content Server 10gR3 comes with a number of bundled components that you can install and enable during the Content Server software installation. Check Out and Open is one of these bundled components. Please note that the Check Out and Open component is not selected for installation by default.

Important: The CoreWebdav component *must* be installed and enabled for the check-out-and-open functionality to work properly. Make sure that the CoreWebdav component is selected for installation (it is by default).

The Check Out and Open component is installed in the `[CS_Install]/custom/CheckoutAndOpenInNative` directory (where `[CS_Install]` is the installation directory of the Content Server software).

See the Content Server installation documentation for more information about installing the optional components during the Content Server software installation.

2.1.2 After the Content Server Software Installation

If you chose not to install the Check Out and Open software during the Content Server software installation, you can do so afterwards.

Important: The CoreWebdav component *must* be installed and enabled for the check-out-and-open functionality to work properly. If you need to install the CoreWebdav component, you can find its component zip file at `\packages\allplatform\CoreWebdav.zip` in the Content Server software distribution package.

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance that you want to install the Check Out and Open component on.
The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link.
The Component Manager page is displayed.
5. Click the **Browse** button next to the **Install New Component** field.
6. Navigate to the Check Out and Open component zip file (called *CheckoutAndOpenInNative.zip*) in the `\packages\allplatform` directory of the Content Server distribution package, select it, and close the file selection dialog.
7. Click **Install**. An overview page is displayed providing a list of the items that will be installed.
8. Click **Continue**. All required files are now installed. This may take a few minutes.
After all files have been copied, a message is displayed stating that the component was uploaded and installed successfully.
9. Click the link to enable the component and restart the server.
The content server status page is displayed.
10. Click the restart icon to restart the content server instance.

Figure 2–1 Restart Icon



It is recommended that you close all browser windows before logging into the content server again.

2.2 Manually Installing the Check Out and Open ActiveX Control on Client Computers

An ActiveX control is used for Internet Explorer browsers to provide the Check Out and Open functionality on client computers. (A Java applet is used for non-IE browsers, such as Firefox.) Some organizations have user environments that do not allow downloaded ActiveX controls to be installed. In addition, users in such environments may not have administrative access to their client computers. This limits the ability for individual users to install client software or allow downloaded controls to be installed.

To work around this limitation, you can manually register the *CheckOutAndOpen.dll* file on client computers. The instructions below assume that the client computers are Windows-based.

1. Obtain the *CheckOutAndOpen.dll* file. Once the Check Out and Open component is installed on the content server, this DLL file is located inside the `[CS-Dir]/weblayout/common/checkoutandopen.cab` file. Use a standard zip file tool such as WinZip to extract the file. You may extract the file to the `C:\Windows\System32` directory.
2. Open a command-line console.
3. Go to the location where you extracted the *CheckOutAndOpen.dll* file, for example:

```
cd \windows\system32
```

4. Register the DLL file. You can do this with the following command:

```
regsvr32 CheckOutAndOpen.dll
```

5. At this point the control is registered with the system.

The first time a check-out-and-open operation is attempted on the computer, the control will be enabled within the browser. The user should not be prompted to accept the installation. You can validate that this has occurred in Internet Explorer 7.0 by choosing Tools, then Internet Options, then the Programs tab, and then clicking the Manage Add-ons button. You should see "Stellent Check Out And Open Control" in the list of enabled add-ons.

Notes

- It does not matter where you extract the *CheckOutAndOpen.dll* file. The location defined in the previous steps is merely a suggestion.
- You can include the "silent" switch "-s" on the regsvr32 command if desired.
- This works because Internet Explorer will attempt to first look to see if an object with the COAO CLSID is installed and use it before attempting to download the ActiveX control.
- If Desktop Integration Suite 7.5 or higher (including 10gR3) is installed, it will copy a version of *CheckOutAndOpen.dll* and register it. If the Check Out and Open component is referencing the same CLSID as the one installed by Desktop Integration Suite, then it is used rather than downloaded.

Configuring Check Out and Open

This section covers the following topics:

- ["About Check Out and Open Configuration"](#) on page 3-1
- ["coaoShowLinkExtensions Configuration Variable"](#) on page 3-1

3.1 About Check Out and Open Configuration

Check Out and Open supports configuration variables that can be used to fine-tune the application behavior.

You add the configuration variables to the Check Out and Open configuration file, which is located at `[CS_Install]/custom/CheckoutAndOpenInNative/checkoutandopeninnative_environment.cfg`. This is a plain-text file that can be edited in any text editor. After making a change to the configuration file, make sure that you restart the content server.

If you are running Content Server 10gR3, you can override variables in the component environment file by adding that same variable to the Additional Configuration Variables list on the General Configuration page of Admin Server (which stores the variable in the `[CS_Install]/config/config.cfg` file). In pre-10gR3 releases of Content Server, component-specific environment files override the Content Server's `config.cfg` settings.

3.2 coaoShowLinkExtensions Configuration Variable

The `coaoShowLinkExtensions` configuration variable is a pattern that limits the display of the Check Out and Open action to the file extension values listed in the pattern.

The default is:

```
coaoShowLinkExtensions=*doc*|*xls*|*ppt*|*vsd*
```

This means that, by default, the Check Out and Open action is available for Microsoft Word, Excel, PowerPoint, and Visio files.

Using Check Out and Open

This section covers the following topics:

- ["About Checking Out and Opening Content"](#) on page 4-1
- ["Opening Content From the Content Server"](#) on page 4-2

4.1 About Checking Out and Opening Content

After the Check Out and Open component has been successfully installed and enabled, users can check out and open content items directly from the content server using the "Check Out and Open" option on search results pages and content information pages.

Note: The system administrator may have limited the file types for which the Check Out and Open option is available. See [Chapter 3, "Configuring Check Out and Open."](#)

When you check out and open a content item, the content item opens in its native application if the application is WebDAV-compliant (for example, Microsoft Word). You can edit the content item and check it back into the content server using that application. Each time you save the content item in the native application, a new revision of the item is checked into the content server.

Figure 4-1 Check Out and Open Option on Search Results Page

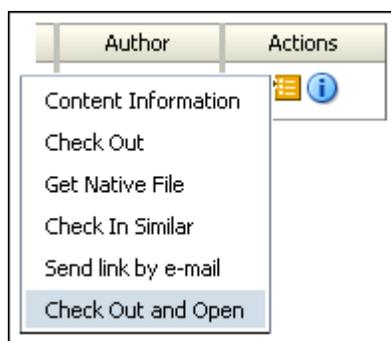
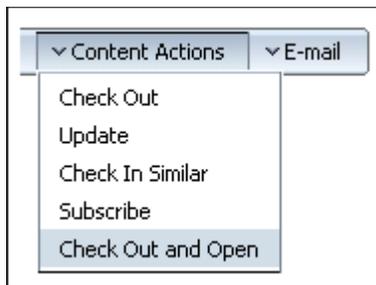


Figure 4–2 Check Out and Open Option on Content Information Page

4.2 Opening Content From the Content Server

To check out and open a content item directly from the content server, complete the following steps:

1. Log in to the content server using a web browser.
2. Search for the content item that you want to check out and open, and do either of the following:
 - Click the actions icon (Figure 4–3) on the search results page for the content item that you want to check out and open, and choose the **Check Out and Open** option from the popup menu.

Figure 4–3 Actions Icon

- Click the Info button (Figure 4–4) on the search results page for the content item that you want to check out and open. This opens the content information page. Choose the **Check Out and Open** option from the Content Actions menu.

Figure 4–4 Info Icon

3. Depending on your computer security settings, a warning may be displayed asking you to confirm that you want to install and run the signed ActiveX control (in Internet Explorer) or Java applet (in non-IE browsers) that enables the Check Out and Open feature. If you choose not to install the control or applet, this feature will not work during the current content server session.
4. A transfer dialog is displayed, and the content item opens in its WebDAV-compliant native application. Edit the document as required, saving each time you want to create a new revision of the content item in the content server.
5. Close the content item in the native application to automatically check it back into the content server as a new revision.

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