202-mobile-fea-005
Mobile – Read Only Checked out Parcels
Govern V6

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DOCUMENT AUDIT REVISION HISTORY				
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Disclaimer

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Overview

The **Check In** and **Check Out** features are options that are available for the Govern Mobile application. These options mediate data contention when parcels are checked out. It prevents checked out parcels from being accessed by other users thereby avoiding data being overwritten when they are checked in. When checking out a record, only the current user on the current computer may modify it.

NOTE: Users can use the Check In/Check Out functionality on a Mobile deployment record, but the lock will also takes effect on a regular Deployment.

NOTE: Only Profiles with Parcel ID's as the Dataset Type Code are supported at this point in time. *See Appendix A – Database Columns for details.*
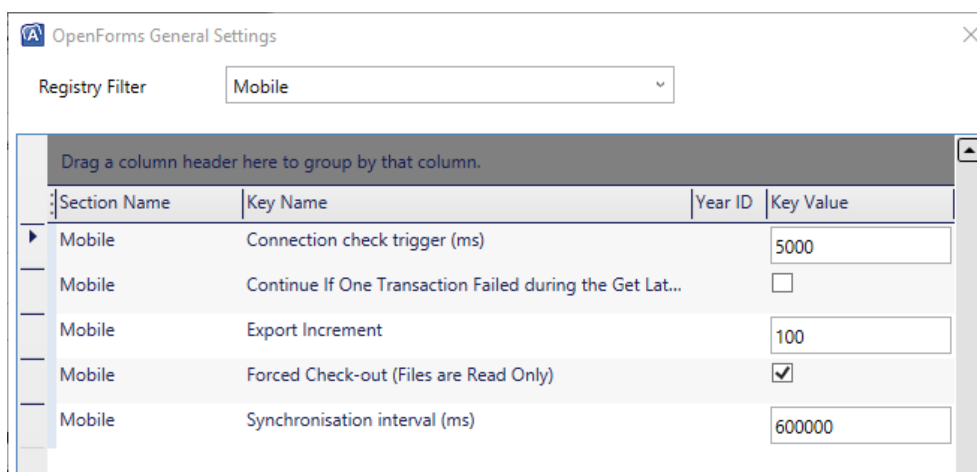
Check Out

A *Check Out* is the action of locking a record for the exclusive use of the current user and the current computer. When a record is checked out, it can only be modified on the computer that it is reserved for, and by the user that checked it out.

NOTE: Mobile Data could be missing *Check Out* information for other users if the database has not been **Downloaded/Synched**. When requesting that a record be checked out, Govern verifies on the system that the record has not been checked out by another user. A message listing all record that cannot been checked out is displayed by the system.

Forced Check Out

The option is located in the Govern New Administration (GNA). In the GNA System Parameters, you can specify if the user must have the record checked out in order to be able to edit it. When enabled, all form records will be in **Read Only** mode until the record has been checked out.

The **Forced Check-out** parameter is located in the *OpenForms General Settings* form located in the 'Mobile' Registry Filter.
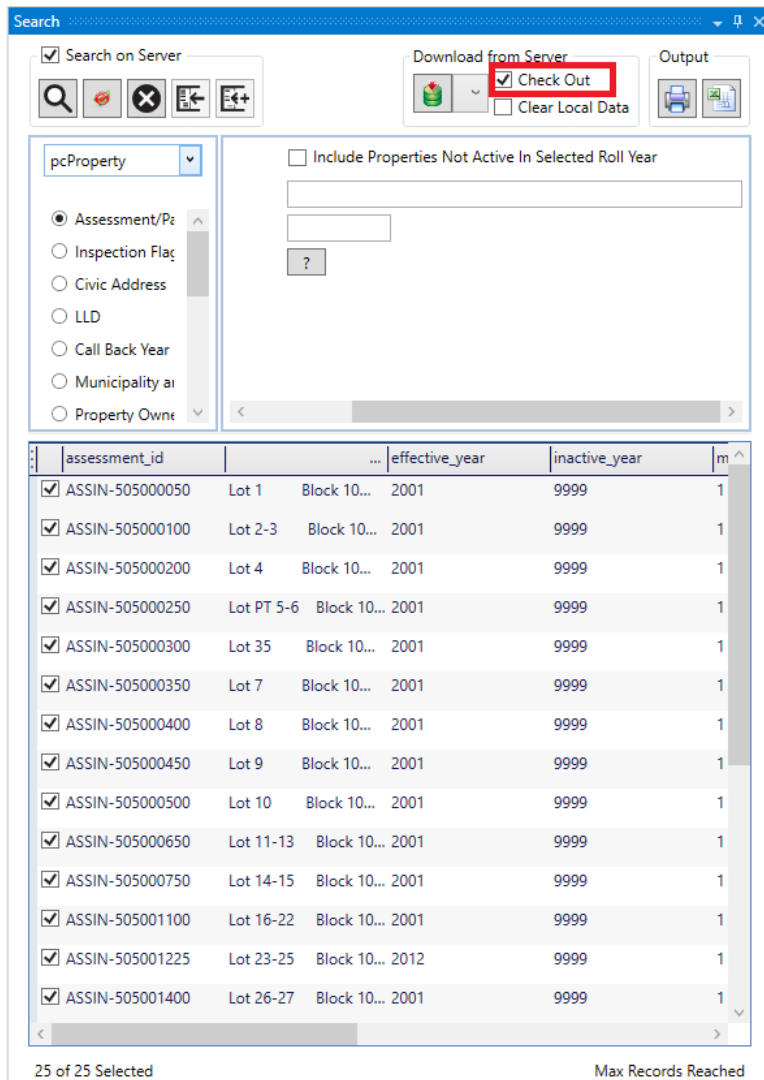

How to Check Out a record
The following are ways to check out a record with Govern Mobile.

From the Search Toolbar

When downloading records from the Server, users can click '**Check Out**' to check out all downloaded records at the same time.
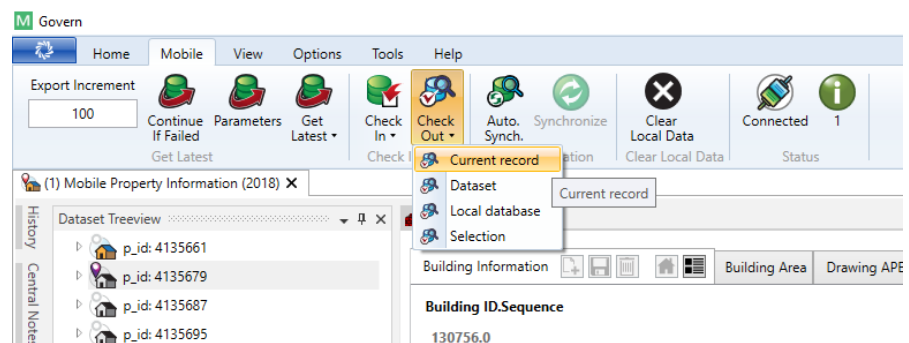

From the Mobile Ribbon

On the Mobile ribbon...

Select Mobile (tab) >Under the Mobile 'mobile' Ribbon tab, you will find a *Check Out* button with four (4) options:

- Current record
- Dataset
- Local database
- Selection

Current record – Select Current record to Check Out the selected record from the Treeview.

Dataset – Choose Dataset to Check out all records that have not been checked out in the Treeview.

Local database – Selecting Local database will check out all records that have not been checked from the Mobile Database, i.e. downloaded records.

Selection – When you select Selection, a window will be displayed that will list all records that have not been checked out from the Mobile Database.

Use one of the above options to select all records that are required to be checked out.
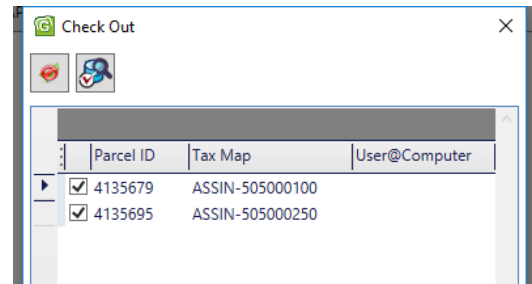
From the Treeview Record Icon

When hovering above a record in the Govern Mobile Treeview, you will see a Check Out icon. Click this icon to Check Out the highlighted record.
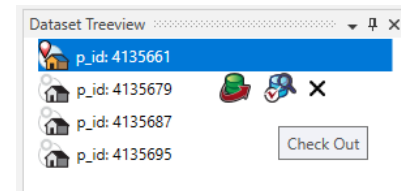
From the Treeview Record Context Menu

In the Govern Mobile Treeview, a right-click on a record will display a context menu. You will observe a *Check Out* icon. Select *Check Out* to check out the selected record.
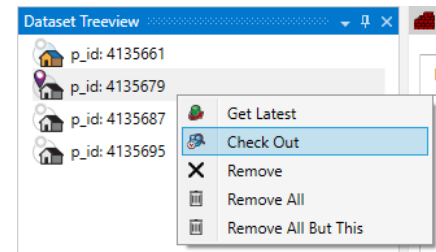
Check In

A *Check In* action will unlock any record that was previously flagged by the system as checked out by the same user, on the same computer.
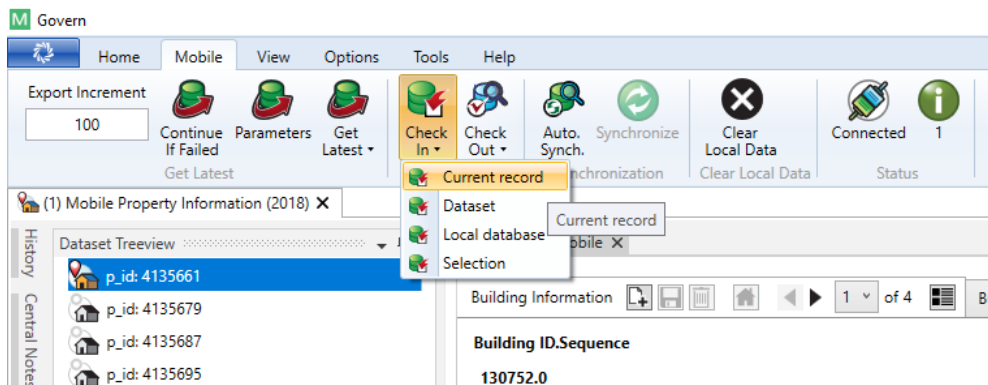
How to Check In an record

The following is a list of the ways to Check In a record with the Govern Mobile application.

On the Mobile Ribbon

On the Ribbon of the Mobile application...

1. In the Synchronization group, click the 'mobile' Ribbon tab, you will see the Check In button; a click on the button will display four (4) menu options.

Check In menu options

Current record – Check in the selected record from the Treeview.

Dataset – Check in all checked out records in the Treeview.

Local database – Check in all checked out records from the Mobile Database (downloaded records)
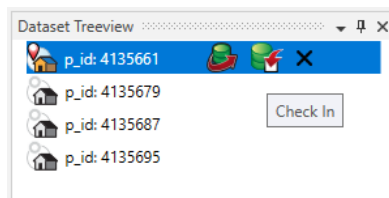
Selection – Opens a selection window that lists all checked out records from the Mobile Database.

Select one of the above options to select all records that are required to be in.
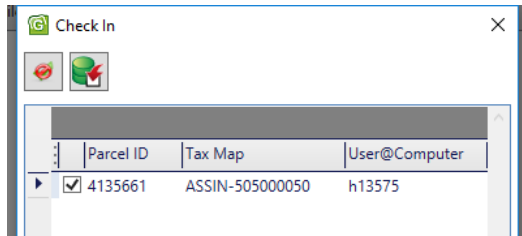

From the Treeview Record Icon

When you hover over a record in the Treeview in Govern Mobile, you will be presented with a Check In icon. Click this icon to Check In the selected record.


From the Treeview Record Context Menu

A right-click on the target record in the Treeview in Govern Mobile will display a Context menu with a Check Out icon. Clicking it will Check Out the selected record.
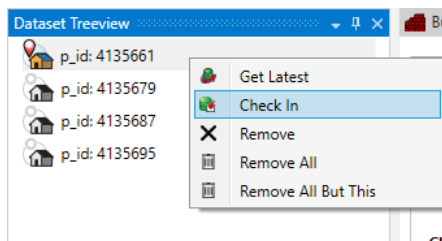
Clear Local Data

When connected to the server, a click on **Clear Local Data** on the Mobile ribbon will also clear all checked out information for the current user/computer.
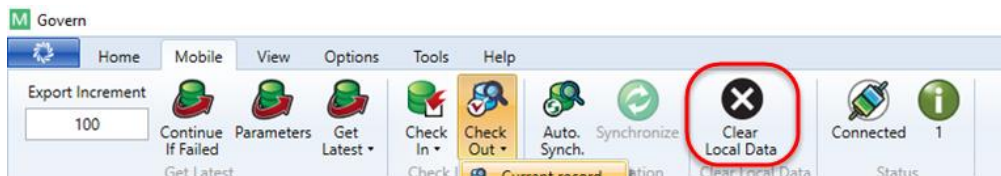
Mobile - Enable/Disable Record Editing

Records that are used in the Govern Mobile application can be presented in one of two states, **editable**, and **not editable**. There are multiple ways a record can be set to *not editable* when using Govern Mobile. Below is a list all possible ways a record is not editable when Govern and Govern mobile are used.

What prevents record editing?

Force Check Out

If the System registry parameter Force Check Out is activated, you mu~~editable.~~

NOTE: This will only have effect within the Govern Mobile application

Refer to the Mobile Check In/Out Documentation for more informatic

Checked Out

All records that are checked out are not editable except when edited by the same user, and on the same computer as the Check Out information. The Edit Mode button will be available in the Treeview and the Check Out information (user name and computer name) will appear in the tree-view record tool-tip.
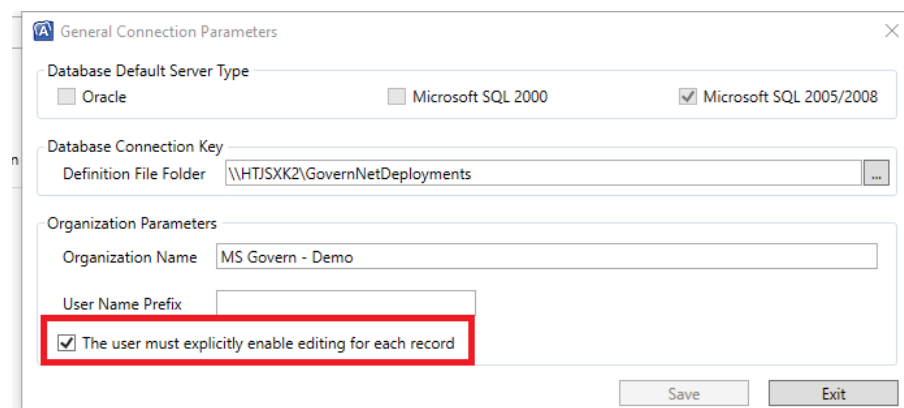
NOTE: See below for more information on how to enable the Bypass Checkout.

Refer to the Mobile Check In/Out Documentation for more information on the Check Out.

Force Edit Mode

The parameter 'Force Edit Mode', when True, will prevent editing of any records until it is enabled. The Edit Mode button will be available in the Treeview. The Treeview record tool-tip will indicate that the user must enable editing.

Please see below for more information on how to enable editing.

You will find the parameter in the General Connection Parameters window in GNA in the Parameters ribbon.

How to identify Read Only records?

Dataset Type Code: Parcel ID

The Treeview icons that represent a *Profile by Parcel ID* is a house. Editable records are presented with an orange house icon. Records that are not editable are displayed with a gray icon.

- Editable: House is orange
- ReadOnly: House is gray
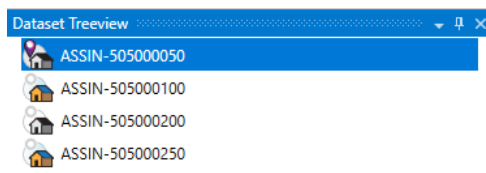
Tree-view Record Tool-tip

When hovering over a record in the Tree-view, a tooltip is displayed. Details about the state of the record are displayed in the tool-tip. The rules that that prevent the record from being editable are editable will be listed.
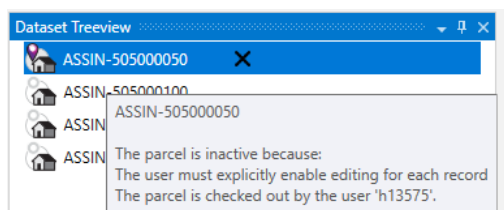
Configuration

Enabling record editing

The following actions will enable record editing.

Force Check Out

When a record is checked out, editing of the record is enabled. *Refer to the Mobile Check In/Out Documentation for more information on the Check Out procedure.*

Bypass Checkout

Should you need to edit a record after it has been checked out by another user, but you can use the Bypass Checkout option.

NOTE: This option can only be enabled by administrators with access rights.
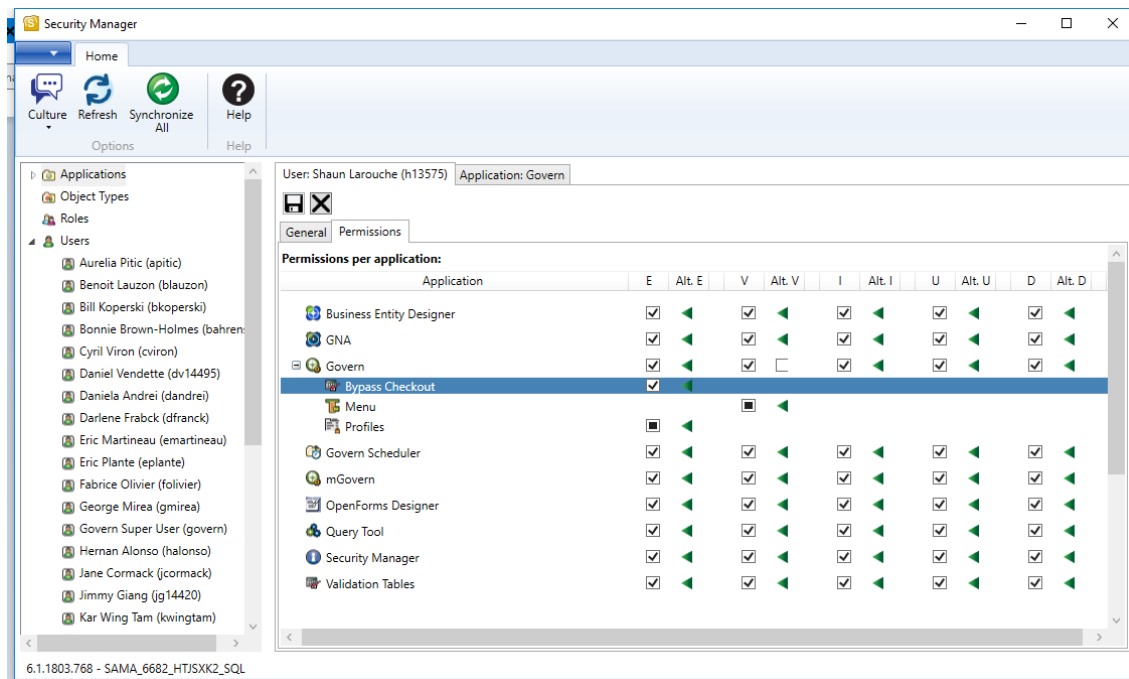
Enabling Bypass Checkout

The Bypass Checkout option is a Govern permission that is managed through the Govern *Security Manager* (**SM**).

In the Security Manager...

1. Select a User/Role.
2. Open the Permissions window.
3. Drill down to the Govern application.
4. Locate the *Bypass Checkout* node.

5. Click to enable the (E)dit check box.

How to Bypass a Checked Out Record

Bypassing check out us made by using the Tree-view record button 'Enable record editing'

Force Edit Mode

You can enable the edit mode with a click on the Tree-view record button 'Enable record editing'

'Enable record editing' Button

This button is available in Govern or Govern Mobile. It has two purposes:

- Bypassing Checkout
- Forcing Edit mode.

Clicking it will override both rules.

Enable/Disable Editing

This button is a Toggle Button. Click it to activate the editing and click it back to deactivate it.

The color of the icon will change to indicate the record status and the Tool-tip will indicate what the next click will do:

Editable

- Icon: Dark gray paper sheet
- Tool-tip: Disable record editing (clicking back will disable)

Read Only

- Icon: White paper sheet with pen over it
- Tool-tip: Enable record editing

Dataset Treeview

- ASSIN-505000050
- ASSIN-505000100
- ASSIN-505000200
- **ASSIN-505000250**

Disable record editing

Dataset Treeview

- ASSIN-505000050
- **ASSIN-505000100**
- ASSIN-505000200
- ASSIN-505000250

Enable record editing