F2 Desktop

Cases

Version 9

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Welcome to cBrain F2

cBrain F2 is an electronic document and records management system (EDRMS) based on a fully integrated e-government model. The F2 software is designed to accommodate the user's need for an organised and flexible tool.

The F2 standard system is developed to support full digitisation of the work performed by public authorities, private organisations and companies. In addition to facilitating best practices for digital case and document management as well as communication and knowledge sharing, F2 supports public authorities' special requirements related to administrative tasks, registration and archiving.

Reading instructions

This manual is written for users of F2 Desktop. The manual contains a general description of its functionality. The description adheres to best practice in digital bureaucracy.

Documentation for the F2 Desktop client is divided into six manuals:

1. The Main Window
2. Searches
3. Settings and Setup
4. Records and Communication
5. Cases
6. Management and Organisation

The manual that you are currently reading is highlighted in blue.

The manual is based on an F2 solution with all available add-on modules installed. Users may notice some differences between their own F2 client and the one presented here depending on the add-on modules included in their organisation's F2 solution.

In this manual, the names of commands are **bolded**. Commands are clickable features such as buttons. The names of fields and lists are placed in "quotation marks".

References to other sections within the document and references to other documentation are *italicised*.

Additional documentation for F2 Desktop

cBrain offers a guide to F2 administrators as well as a number of technical guides:

- *F2 Desktop – Administrator*
- *F2 Operations Handbook*
- *F2 Software Requirements*
- *F2 Hardware Requirements.*

F2 add-on modules

In addition to the functionality described in this manual, F2 supports a number of processes and functions in the form of add-on modules.

Examples of cBrain's add-on modules include:

- F2 Merge Codes, which enables the merging data from F2 to templates. The module enhances document quality through the use of merge fields utilising metadata and information from the participant register.
- F2 Approvals, which facilitates the handling of simple and complex approval processes. The module helps support quality assurance of ongoing work.
- F2 Manager, which enhances the mobility of executives by offering online and offline access to meeting material and approvals on iPad.
- F2 Touch, which is a web-based version of F2. The module is accessed through a web browser or as an app for mobile devices.

Please contact cBrain for further information.

We hope you enjoy using F2.

Creating a case

In F2 a case is always attached to one or more records. A case can be created either when a new record is created or by attaching an already existing record to a new case. When a new case is created, it is given a case number. The case number is a combination of the year the case is created and the next available number in the list of cases from that year. For example, a case with the case number "2018 – 96" means it was the 96th case created in 2018.

Creating a case when creating a new record

When creating a new record, it is possible to either attach the record to an already existing case or to create a new one. To create a new case in the "New record" dialogue, enter either a "+" or type "New case" in the "Case" field and press **Enter**.

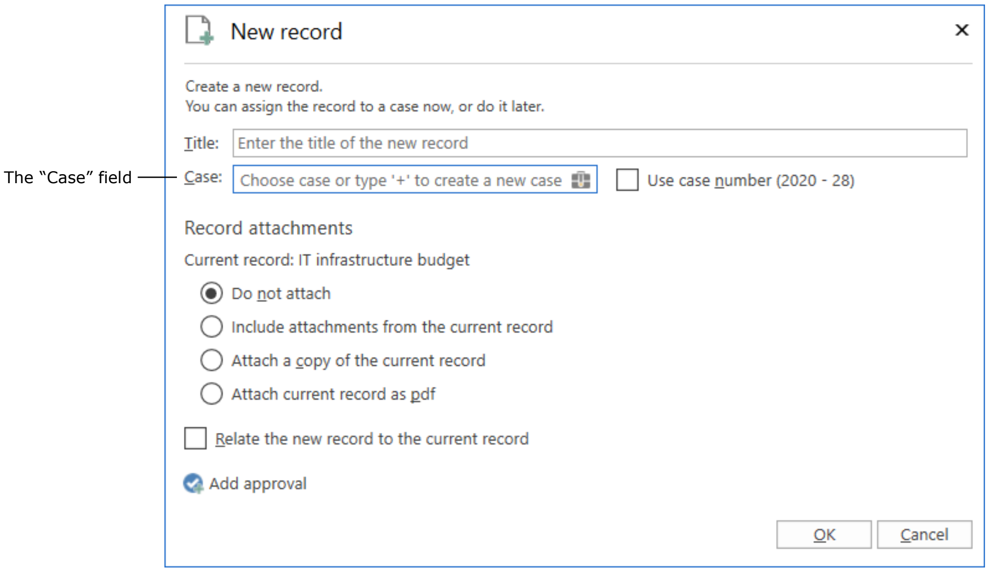


Figure 1: Create a new case on a new record

The "New case" dialogue opens. Here it is possible to enter a case's title and any relevant metadata such as file plan, action code, and task guide (add-on module). Depending on the setup of F2, it may also be possible to select a case template. This can influence which metadata fields that must be filled in.

Case templates require an add-on module for F2. Depending on the organisation's fields of work, it is possible to have more than one case template in the F2 installation. For example, a case template for HR cases could be configured to suggest a specific file plan number and automatically add a security group to the case. For further information on case templates, see *F2 Case Template Editor – User manual*.

When the fields have been filled in, click **OK** to create the case.

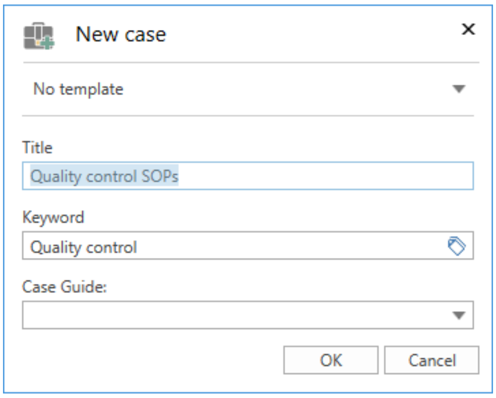


Figure 2: The "New case" dialogue

Note: Depending on F2's configuration and the guidelines of the organisation, the mandatory fields of the "New case" dialogue may differ. There may also be fields that are filled in automatically.

Creating a case from an existing record

It is possible to attach an already existing record to a new case. This is done either in the record window or via the context menu in the main window.

In the record window (when in editing mode), enter either a "+" or type "new case" in the "Case" field. Then press **Enter**, and the "New case" dialogue opens.

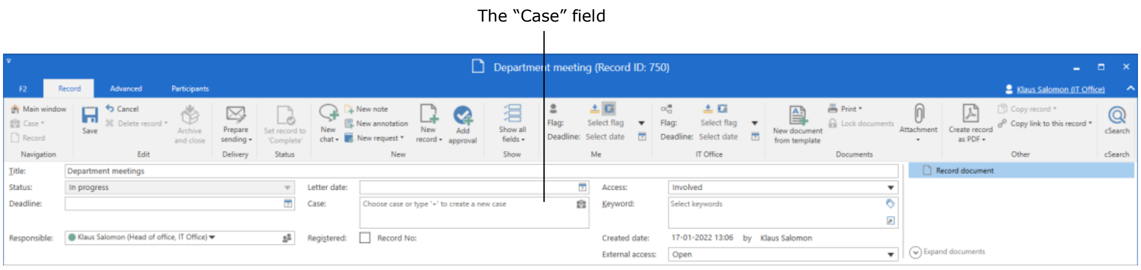


Figure 3: Create a new case from the record window

Enter the relevant metadata in the "New case" dialogue, and click on **OK** to create the case.

Note: F2 suggests using the record title as the case title when creating a case from an existing record. The case title may be edited both before the case is created or at a later time.

Note: Through a configuration, a warning can be enabled to alert users if a case with an identical name already exists in F2. Configurations are performed in cooperation with cBrain.

Then click the **Save** button, and the record is attached to the newly created case.

To attach an already existing record to a new case in the main window, select it in the result list. Right-click on the record and select **Add record to case**.

The “Assign records to case” dialogue opens. Type a “+” or enter “new case” in the “Case” field. Press **Enter** and the “New case” dialogue opens.

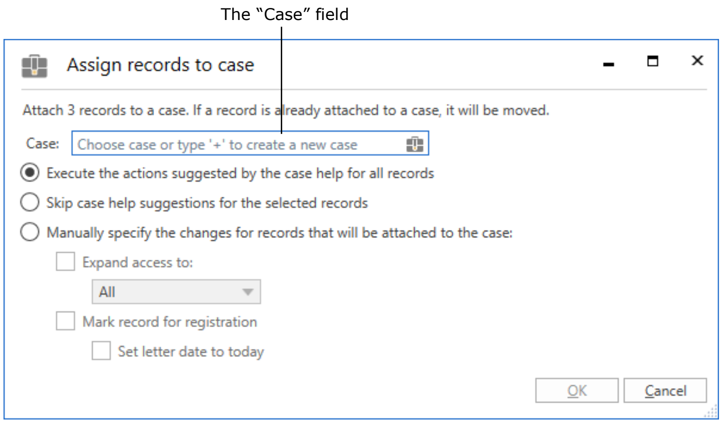


Figure 4: The “Assign records to case” dialogue

Enter the relevant metadata in the “New case” dialogue, and click on **OK** to create the case.

When the case has been created, click on **OK** in the “Assign records to case” dialogue to attach the records to the new case. If the selected records are already attached to a case, they will be moved to the new case.

Note: Depending on F2’s configuration and the guidelines of the organisation, the mandatory fields of the “New case” dialogue may differ. There may also be fields that are filled in automatically. Which fields are mandatory may differ.

The case window structure

Double-click on a case to open the case window. At the top of the window, above the ribbon, the case number and title are displayed. This allows users to identify the case at a glance.

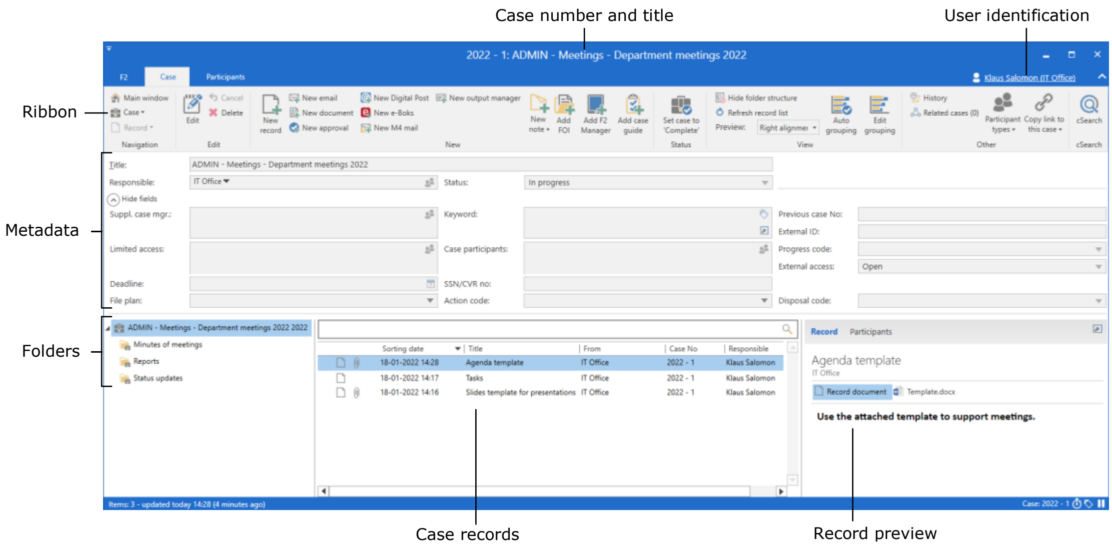


Figure 5: The case window structure

The main tab in the case window is entitled “Case”. Its ribbon contains several menu items for navigating, communicating, processing and managing the case. The case window also contains the “F2” tab with several functions for the general use of F2, including F2 support, and the “Participants” tab, which shows the involved participants. Depending on the available add-on modules, there may be additional tabs, such as the “F2 Manager” tab.

Farthest on the right is the user identification, which shows which user is logged in and their current unit. Read more about user identification settings in the manual *F2 Desktop – The Main Window*.

Below the ribbon is the case metadata such as title, user or unit in charge of the case, and case status, i.e. whether the case is in progress or completed. This is the simple case view.

Click on **”Show more fields”** or **Ctrl + L** to display additional metadata fields on the case. Using these it is possible to e.g. assign responsibility, tag the case, and specify participants.

The case folder(s) can be found on the left side of the window under the metadata fields. It is possible to create a number of case subfolders here for the purpose of organising the case records.

To the right of the case folders are the records assigned to the case. It is possible to sort, group and apply unique column settings as needed.

If the preview is activated, it displays a preview of the chosen record from the result window. The preview can be hidden at any time.

The case window’s ribbon

Menu items for working with cases are found in the case window ribbon.

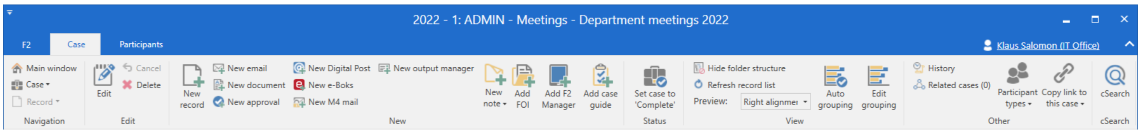
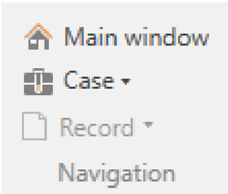


Figure 6: The case window ribbon

The menu items in the case window ribbon are described below.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>
</td><td>Navigate quickly and easily between the main and record windows by clicking on the desired menu item.

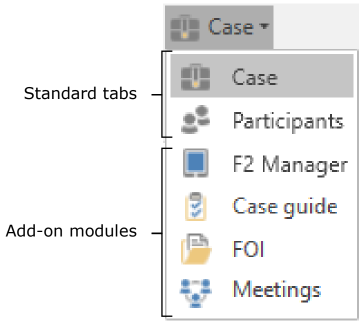
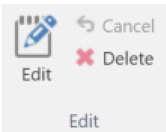
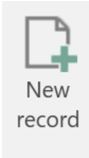
By default it is also possible to navigate to the case window and the “Participants” tab. If one or more add-on modules are installed and added to the case, e.g. F2 Manager, it is also possible to navigate to their windows by clicking on the drop-down menu next to Case as shown below.


Figure 7: Navigate to participants or add-on modules

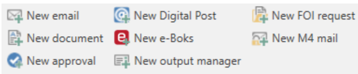
Note: The Record menu item is only availabe if any records are open.</td></tr>
<tr><td>
</td><td>Click on Edit to enter editing mode. This is possible for users with write access to the case and lets them edit its metadata.

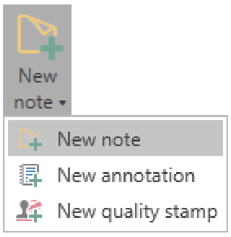
“Cancel” is only available when the record is already in editing mode. Click Cancel to undo any changes done in editing mode.

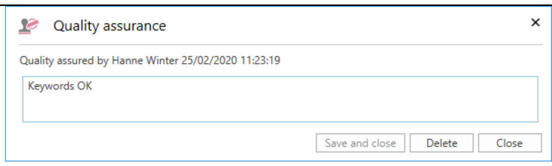
Delete deletes the case and any associated records. To delete cases a user must have either the “Can delete cases” privilege or the “Can delete everything on cases” role. Read more about both in the Delete case section.</td></tr>
</table>

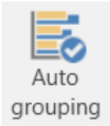
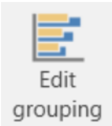
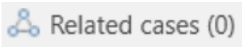
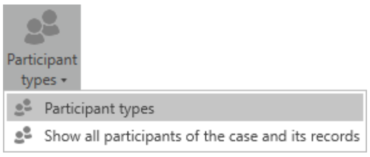
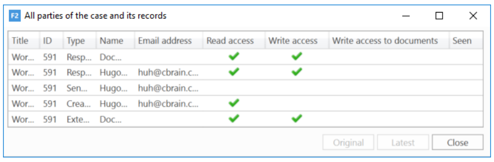
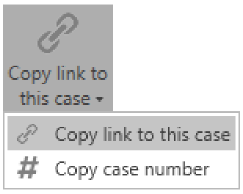
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>
</td><td>Click on Save to save any changes. This button replaces “Edit” when the case is in editing mode.</td></tr>
<tr><td>
</td><td>Open the “New record” dialogue from which it is possible to create a new record.

Read more about this function in F2 Desktop – Records and Communication.

A record created from the case window is attached to the case unless deselected in the “New record” dialogue.</td></tr>
<tr><td>
</td><td>Add to the case a:
New email
New document
New approval (add-on module)
New Digital Post (add-on module)
New e-Boks (add-on module)
New output manager (add-on module)
New FOI request (add-on module)
New M4 mail (add-on module)
These functions are described in F2 Desktop - Records and Communication.

New additions in the case window are linked to the case unless deselected.</td></tr>
<tr><td>
</td><td>Add to the case a:
New note. Read more about notes in New note.
New annotation. Read more about annotations in F2 Desktop – Records and Communication.
New quality stamp (add-on module). This is a special note indicating that e.g. a selected keyword or action code has been quality assured.
The “Quality assurance” dialogue indicates who has quality assured the case, when it has been done, and displays any comments.</td></tr>
</table>

Function	Description
	 **Figure 8: The "Quality assurance" dialogue**
Add FOI	Add an FOI request to the case. F2 FOI request, Advanced is an add-on module. For further information, see *F2 FOI Request, Advanced – User manual*.
Add F2 Manager	Make the case available on F2 Manager (iPad). F2 Manager is an add-on module. For further information, see *F2 Manager – User manual*.
Add case guide	Attach a case guide to the case. Requires the F2 Task Guides add-on module. Contact cBrain for further information.
Set case to 'Complete'	Change the case status from "In progress" to "Complete", and F2 may perform a clean-up of the records on the case. A user must have the "Closer cases" privilege in order to close cases. For further information on this privilege and F2's standard behaviour when closing a case, see *Completing a case*.
Reopen case	Reopen the case. After a case has been completed, it can be re-opened. A user must have the "Reopener case" privilege to reopen cases.
Show folder structure Hide folder structure	Show/hide the folder structure of the case.
Refresh record list	Update the list of case records. This update can also be performed by pressing the **F5** key.
Preview: Right alignmen Right alignment Bottom alignment Hidden	Choose the location of the case window preview. This setting affects all F2 cases, but has no effect on the main window preview. For more information, see the section *Preview of case records and documents*.

Function	Description
	Activate auto grouping of case records. For more information about auto grouping, see the user manual *F2 Desktop – Searches*.
	Edit auto grouping of case records. This function is disabled when auto grouping is not selected. For more information, see the user manual *F2 Desktop – Searches*.
	Show the case history.
	Show any cases related to the case.
	Functions: • **Participant types** shows the case participants. F2 Participant Types is an add-on module. Read more about participant types in the *F2 Participant Types – User manual*. • **Show all participants of the case and its records** shows the participants involved in the case and its records. The participants' access rights to the case and records are also displayed.  **Figure 9: The "All parties of the case and its records" dialogue**
	Functions: • **Copy link to this case** creates a link to the case that can be pasted into e.g. a document or metadata field with Ctrl+V. • **Copy case number** copies the case number that can be pasted into e.g. a document or metadata field with Ctrl+V.
	Open the search tool cSearch. cSearch is an add-on module. For more information about cSearch, see the *F2 cSearch – User manual*.

Case functions

This section describes a selection of functions related to cases.

Delete case

A case can be deleted using the ribbon in the case window. Click **Delete** to delete the case. A case can only be deleted when it is in read-only mode. The "Delete" button is deactivated when the case is in editing mode.

Figure 10: Delete case

A user must have either the "Can delete cases" privilege or the "Can delete everything on cases" role to be able to delete a case in F2. The differences between the role and the privilege are described in the next sections.

> **Note**: When a case is deleted, all records on the case are deleted as well. The records are deleted instantly from F2 and cannot be found in e.g. "My deleted records" afterwards.

Delete case with the "Can delete cases" privilege

A user with the "Can delete cases" privilege can delete cases in F2 if the following criteria are met:

- The user has write access to all the records on the case.
- None of the records on the case are in editing mode or in any other way locked.

Click on **Delete** to delete the case. F2 then checks if all the records on the case can be deleted by the user. If one or more records cannot be deleted, the case cannot be deleted. This may happen if one of the records on the case is in editing mode. If all records on the case can be deleted, the "Reason for deletion" dialogue opens. Here the user must enter the reason for deleting the case.

Figure 11: The "Reason for deletion" dialogue

Once a reason has been entered and the user clicks on **Delete**, the "Generate report with deleted items" dialogue opens.

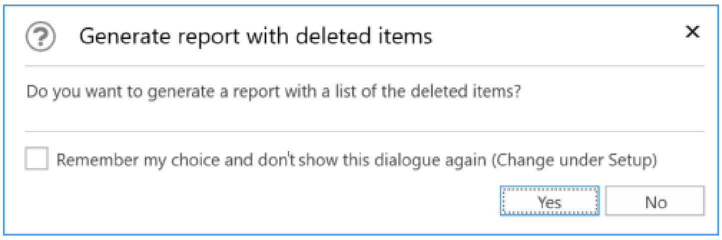


Figure 12: The "Generate report with deleted items" dialogue

In the dialogue, the user can choose to generate a report containing a list of the deleted items. F2 can be set up to remember this choice for future case deletions. This option can be found on the "Settings" tab in the main window by opening the "Setup" dialogue on the "Cases" tab. Read more about setting up reports in the section *Setting up the report for deleted cases*.

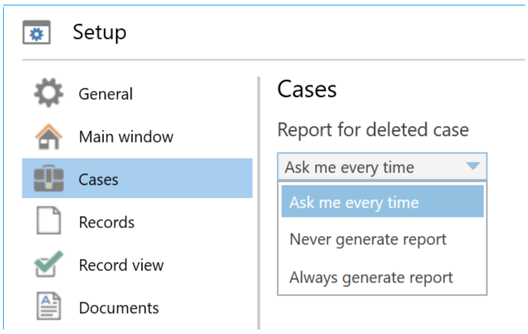


Figure 13: The "Report for deleted case" in "Setup"

If a user decides to generate a report, the report is placed in the user's inbox.

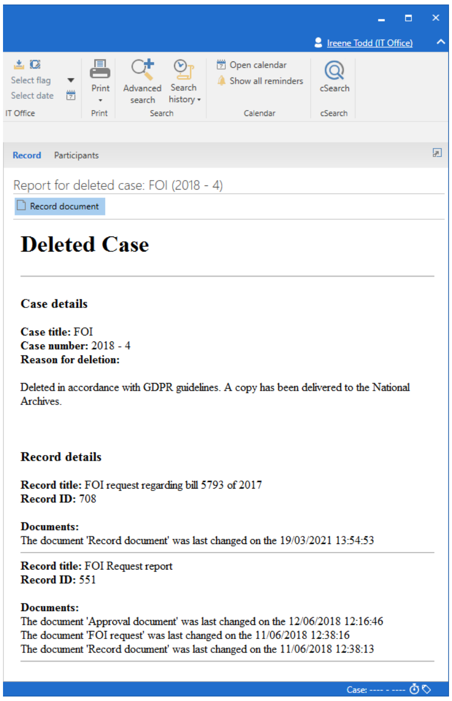


Figure 14: An example of a report for a deleted case

> **Note**: The report for a deleted case is based on a template that can be configured to fit the needs of the individual organisation. It is also possible to deactivate the report option completely. This is done in cooperation with cBrain.

Delete cases with the "Can delete everything on cases" role

Users who are assigned the "Can delete everything on cases" standard role are able to delete a case regardless of the mode of its records.

If a case is deleted using this role, the user is shown a dialogue containing a list of error messages that would otherwise prevent deletion. This ensures that the user is aware of any consequences before deleting and offers the option of aborting the deletion process. As when deleting a case with the "Can delete cases" privilege, the user must enter a reason for deleting the case.

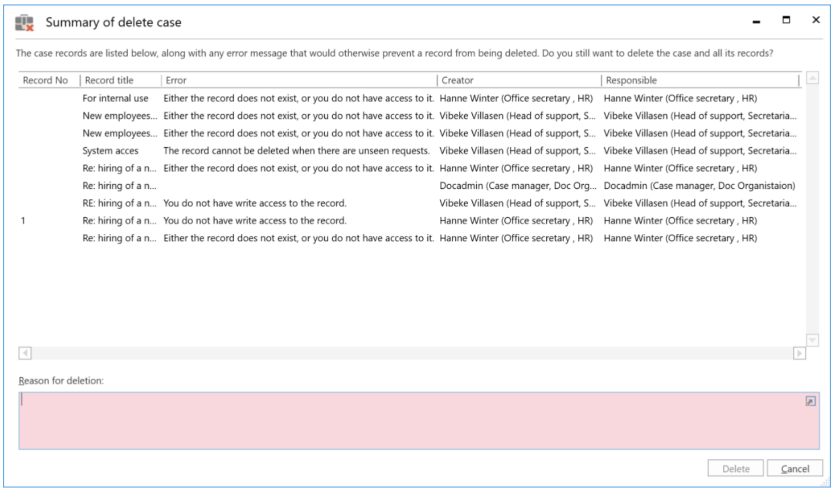


Figure 15: Summary of delete case

Once the case is deleted, a report is generated and placed in the user's inbox. The report contains the case and record information for the deleted case.

The report for a case deleted using the "Can delete everything on cases" role is identical to the one generated when deleting a case using the "Can delete everything" privilege.

> **Note**: Users with this role can delete cases even if they have been locked. This includes cases locked in connection with deliveries to the National Archives (or similar).

Setting up the report for deleted cases

Users who have either the "Can delete cases" privilege or the "Can delete everything on cases" role can determine F2's default behaviour when a case is deleted. For further information, see *F2 Desktop – Settings and Setup*.

New note

Notes may be added to the case. The note window for a case is shown below. As opposed to record notes, participants cannot be added to a case note. As a consequence, case notes do not affect the case's access level.

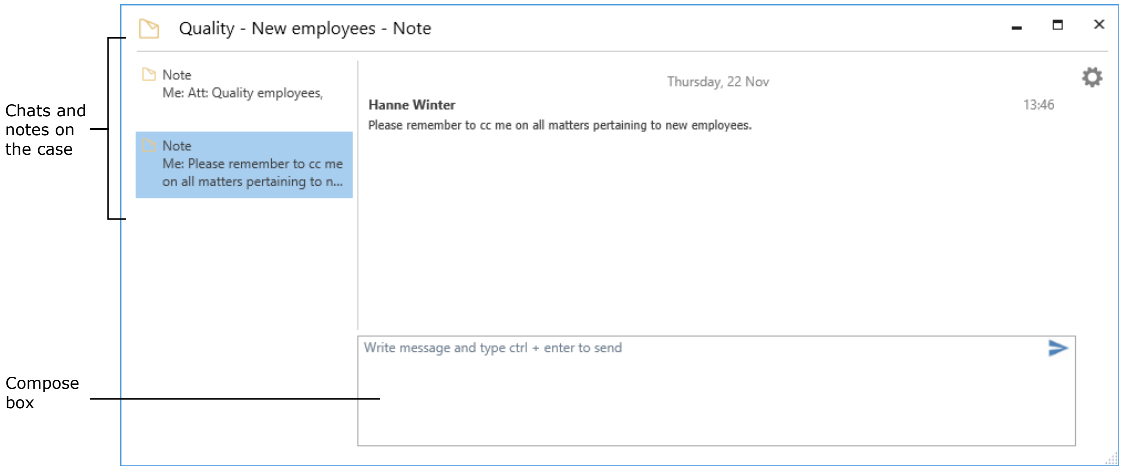


Figure 16: The case note window

Enter the note text in the compose box and click on the ➤ arrow icon or press **Ctrl+Enter**. If there are multiple notes on a case, a list is shown in the left side of the window. Close the window by clicking the X in the top right corner or by pressing **Esc**.

Note: Adding users to a case note to direct their attention to the note is not possible.

The case note window contains a number of functions which are described below.

Functions in the case note window

The case note window's functions are found in the drop-down menu in the upper right corner.

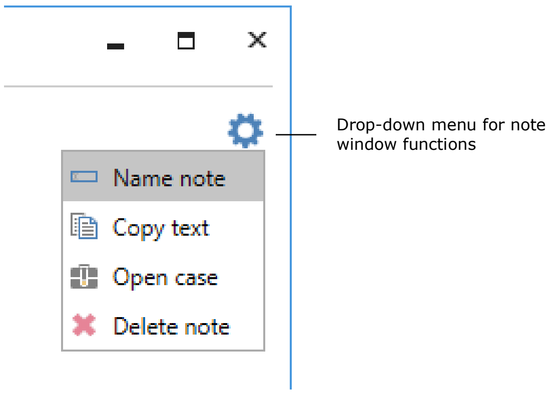


Figure 17: Functions in the case note window

These functions are described below.

Function	Description
"Name note"	Opens a dialogue that lets the user name the note. This may be useful if there are several notes on the case.
"Copy text"	Copies the entire note text.
"Open case"	Opens the case to which the note is linked.
"Delete note"	Deletes the note. Requires the "Can delete notes" privilege. F2 asks for confirmation when a user deletes a note.

Viewing case notes

Case notes can be viewed from both the main and case windows.

In the case window the note is found to the right of the metadata fields. Click on the note icon, , to view its text as a drop-down box. Clicking the note text will open the note window.

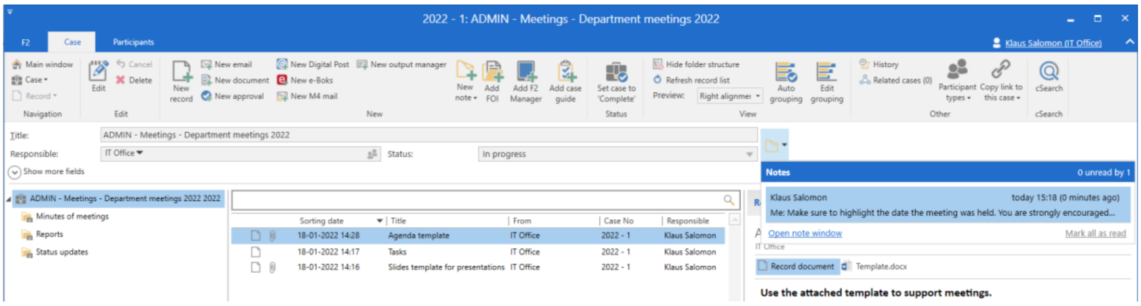


Figure 18: Read a note in the case window by clicking the icon

In the main window, click **Show cases** above the result list to view cases. In the case view, notes are indicated with the icon. To read the note, hover the cursor on the icon as shown below.

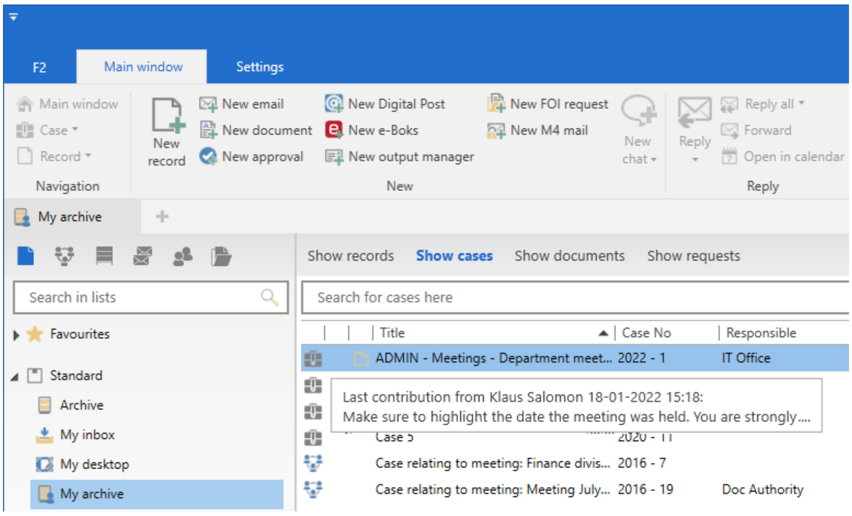


Figure 19: Read a note in the main window by hovering the cursor over the icon

Completing a case

In F2, when the relevant work is done, click **Complete case** in the ribbon to close the case. This action requires the "Closer cases" privilege. The menu item switches to **Reopen case**, which requires the "Reopener case" privilege.

F2 comes with a default configuration that streamlines the process of case completion. As part hereof, F2 attempts to complete all records on a case before it is closed. During this process, the following dialogue appears.

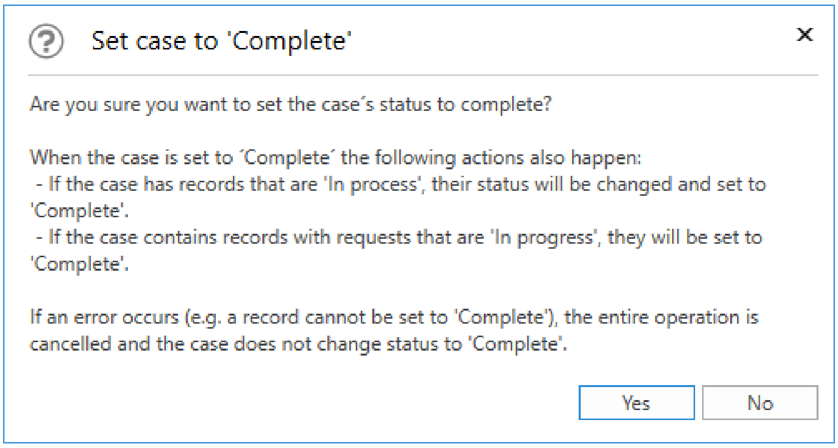


Figure 20: The "Set case to 'Complete'" dialogue

This step of record completion means that users can complete a case only if they have write access to all of its records.

When a case is completed, the following actions can no longer be performed:

- Adding new records to the case.
- Adding existing records to the case.
- Editing case records whether they are registered or not.
- Creating new versions of the case records manually.

- Deleting case records.
- Importing an email to the case.
- Sending case records as emails.
- Creating new annotations on the case or its records.
- Creating new requests on the case records.
- Adding case records to meetings.
- Quality assuring the case.
- Editing the case metadata.

Deleted records that are restored do not retain their case attachment if the case has been completed.

This default configuration can be deactivated in cooperation with cBrain.

Note: If this configuration is deactivated, records can be added to closed cases. For this reason, case titles can be configured to be italicised.

Case history

Click on **History** in the case window ribbon to view the full history of a case.

Figure 21: Open case history

The history shows any changes made to the case and all its records. It is possible to view only the case history by clicking the **Show records** menu item to deactivate it.

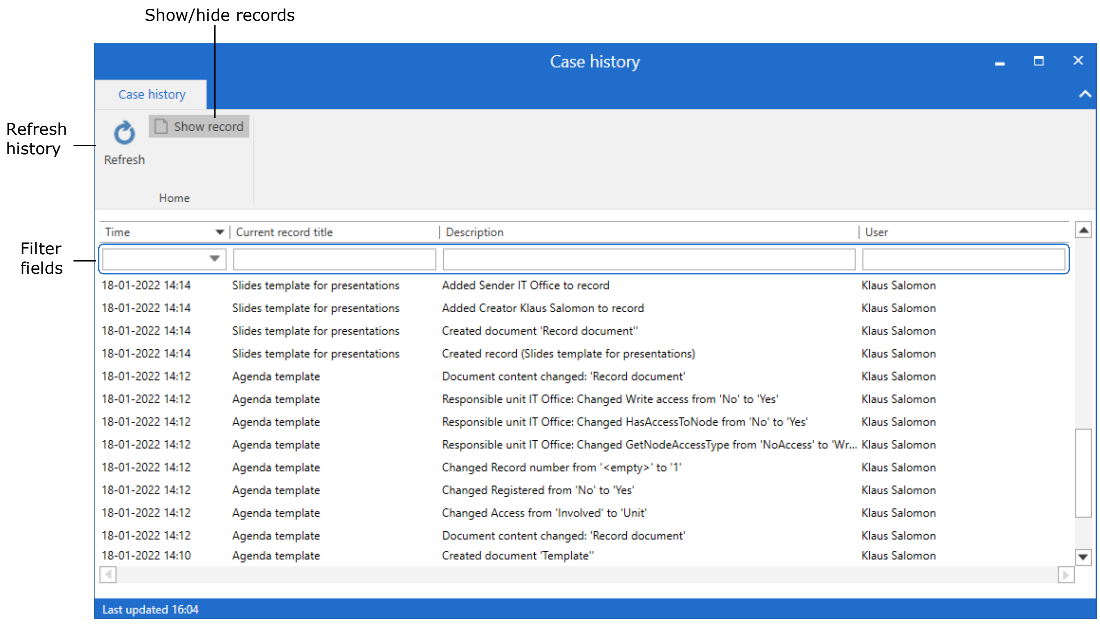


Figure 22: Case history

The history can be filtered by using the fields below the column titles. F2 automatically starts filtering the shown history when the user enters text in a filter field or clicks its drop-down arrow.

Related cases

It is possible to relate cases to each other. Click on **Related cases** in the case window ribbon to open the "Related cases" dialogue. Here an overview is displayed that shows existing related cases. From here it is also possible to create and edit relations between cases.

Figure 23: Open the "Related cases" dialogue

Click on **New** in the dialogue to create a new relation.

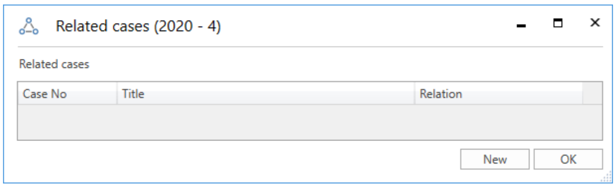


Figure 24: The "Related cases" dialogue

Select a case to relate to the current case and determine the relationship between the cases as shown below. Determine the relationship between the current case and the other case in the "Relation" drop-down menu.

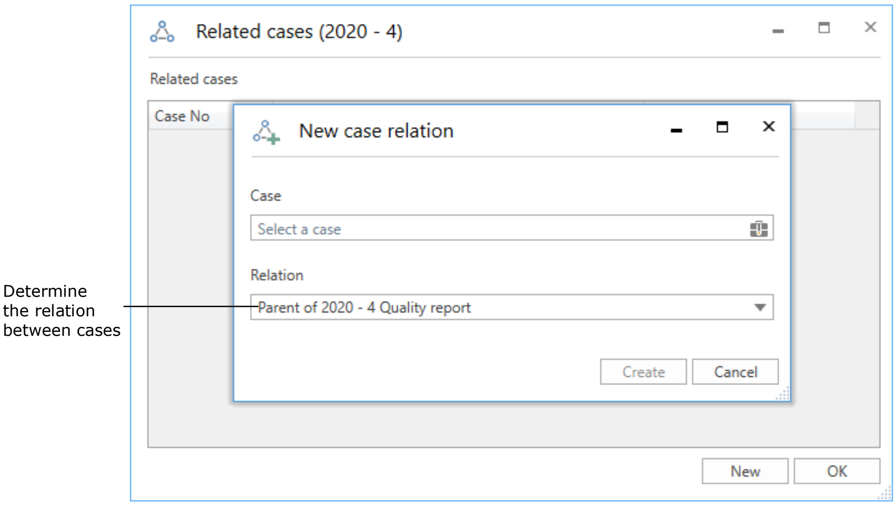


Figure 25: Determine relations between cases

When their relation has been established, the cases appear in the overview of related cases, which is accessed by clicking **Related cases** in the case window ribbon. To edit, delete or open a related case, right-click on it. A case can also be opened by double-clicking on it.

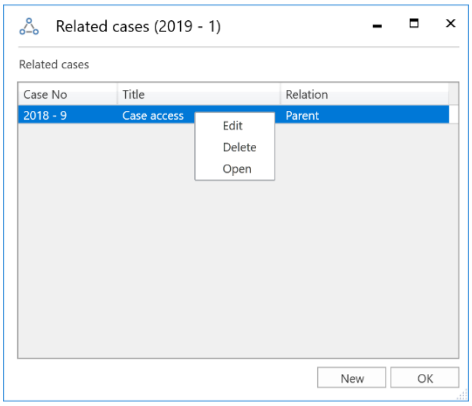


Figure 26: Overview of related cases

Viewing the case metadata

A case can be displayed in one of the following ways:

- Simple case view
- Extended case view.

The case layout is described in the following sections.

Simple case view

The case opens in the simple case view unless the user's personal settings dictate otherwise. In the simple case view, a section of the case metadata is collapsed.

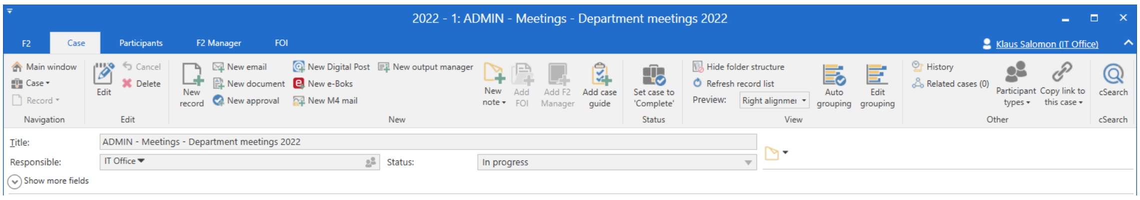


Figure 27: Simple case view

For more information on personal settings, see the user manual *F2 Desktop – Settings and Setup*.

A case is tagged by adding metadata. The table below describes the metadata fields used when tagging cases.

Field	Description
"Title"	Denotes the title of the case.
"Responsible"	Denotes the user or unit responsible for the case. The user/unit who is responsible for the case can edit the case metadata.
"Status"	Indicates whether the case is in progress or completed.

Extended case view

Open the extended case view by clicking **"Show more fields"** in the case window. Clicking on **"Hide fields"** collapses the extended case view. The shortcut **Ctrl+L** can also be used to either expand or collapse the case view.

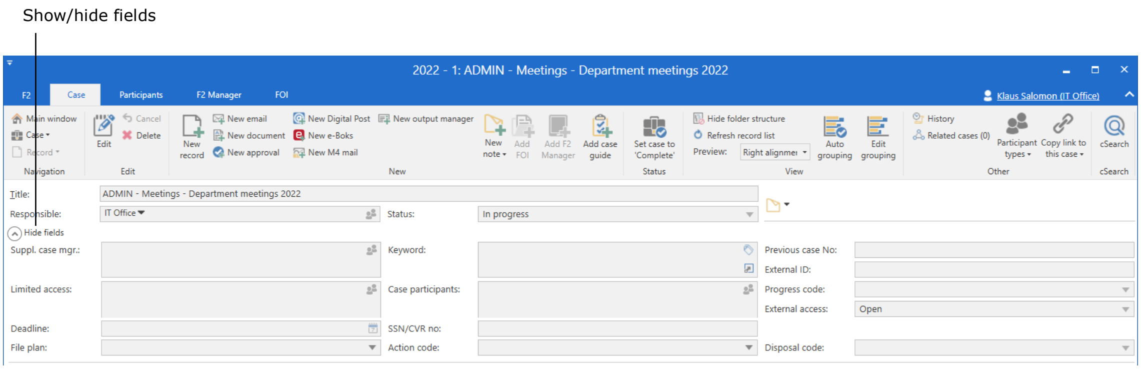


Figure 28: Extended case view

The extended case view's fields and their functions are described below.

Field	**Description**
"Suppl. case mgr."	Here, users/units/teams can be added to the case as supplementary case managers. A supplementary case manager is given access to the case and permission to edit its metadata. These permissions cannot be changed as opposed to those of users who are added as supplementary case managers on a record. For more information about supplementary case managers see *F2 Desktop – Records and Communication*. Users/units/teams do not automatically receive a notification when they are added as supplementary case managers to a case.
"Limited access"	Allows the case manager to limit the access to the case and its records to only include the added security groups/users/units/teams. This access restriction is reflected in the records on the case, which inherits the access restriction (default). For more information about limited access see *F2 Desktop – Records and Communication.*
"Deadline"	Determines when the case must be completed.
"File plan"	Specifies the file plan to which the case is linked. **Note**: This field is only visible if F2 has been configured to display file plans.
"Keywords"	Used for tagging the case. Typically this field is used to organise cases, so they are easier to find via a search.
"Case participants"	Specifies the participants related to the case. Read more about case participants in *F2 Desktop – Records and Communication*.

Field	Description
"SSN/CVR No"	Indicates whether the case concerns a single person or a company.
"Action code"	Indicates the action code to which the case is linked. **Note**: This field is only visible if F2 has been configured to display action codes.
"Previous case No"	Indicates that a case is a further processing of a previous case.
"External ID"	Used for additional identification of the case. One example of this could be a student ID.
"Progress code" (add-on)	If a user chooses to use progress codes for a case, the current status of the case must be specified. The case deadline will change when the progress code changes. This ensures that deadlines for smaller case tasks are complied with. For more information see *F2 Progress Codes – User manual*.
"External access" (add-on)	This field is only used for marking the case in connection with customer-specific integrations. The values are taken from a value list and must be configured in cooperation with cBrain.
"Disposal code"	Specifies when and if the case can/should be disposed of after a certain period of time. **Note**: This field is only visible if F2 has been configured to display disposal codes. Configurations are performed in cooperation with cBrain.

Write access to case metadata

Write access to record and case metadata is identical. This means that write access to cases does not depend on the role with which the user is logged in. A user with multiple job roles does not need to log into the unit to get write access to the case, but has it automatically through their job roles.

Access restriction on cases

A user can search for and find a case as long as they have access to at least one of the records on the case. It is possible to add records to any given case without an access restriction. However, the user must appear in either the "Responsible" or the "Suppl. case mgr" field in order to edit the case or its metadata.

If a user tries to open a case without having access, the dialogue below appears.

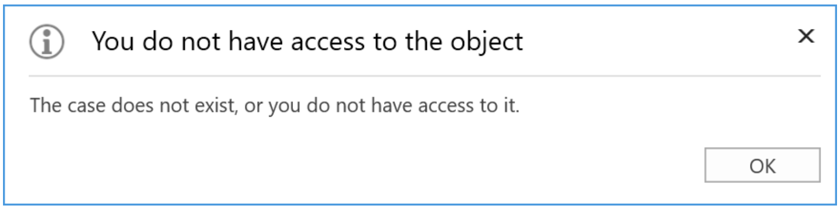


Figure 29: The "You don't have access to the object" dialogue

It is possible to restrict access to a case and its records to only certain users. This is done by selecting the desired security groups, users, units or teams in the "Limited access" field on the case.

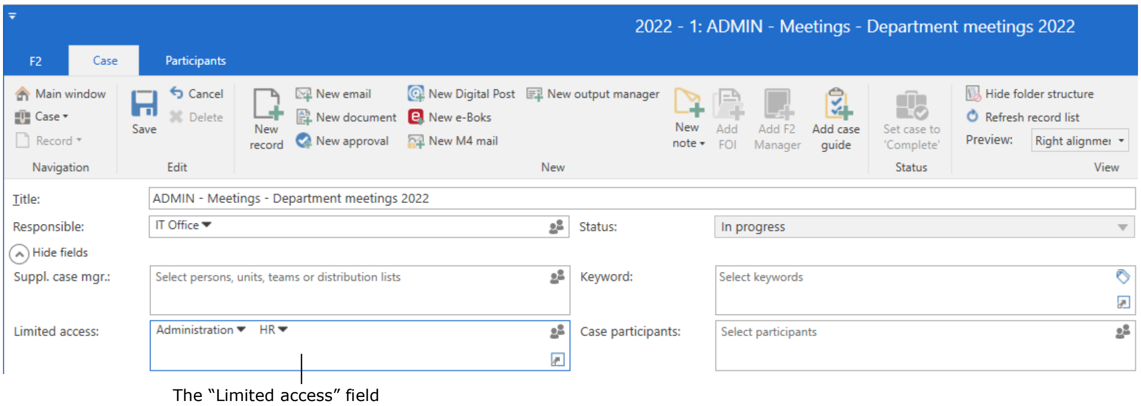


Figure 30: Access restriction on cases

By default, the records on the case inherit its access restriction. The "Case access restricted to" field in the record window shows information about who has access to the case. Hover the cursor over the question mark icon ⓘ next to the "Case access" checkbox to show a tooltip with pertinent information about access restrictions on the record. For further information on access restrictions, see *F2 Desktop – Records and Communication*.

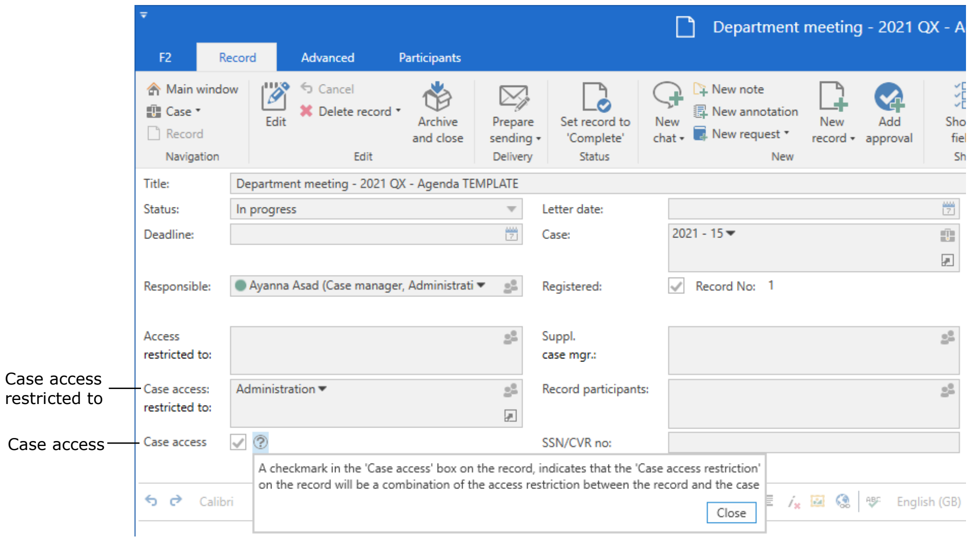


Figure 31: Case access for the records on the case

Case folders

The records of a case can be placed in folders to better organise them. The folders are shown on the left side of the case window while the records in the selected folder are located on the right.

The top folder is named after the case and cannot be deleted. All new records on the case are displayed in this folder.

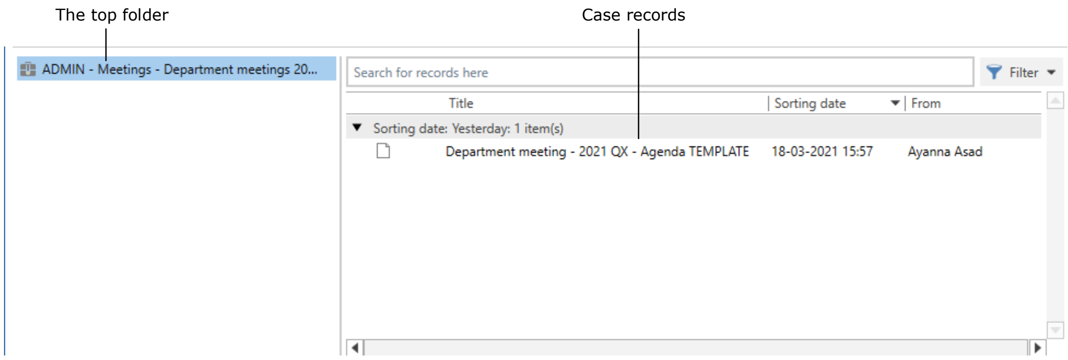


Figure 32: The top folder

Create folder

To create a new case folder, right-click on an existing folder and then click on **Create folder.** A new folder is created, thereby creating a folder structure.

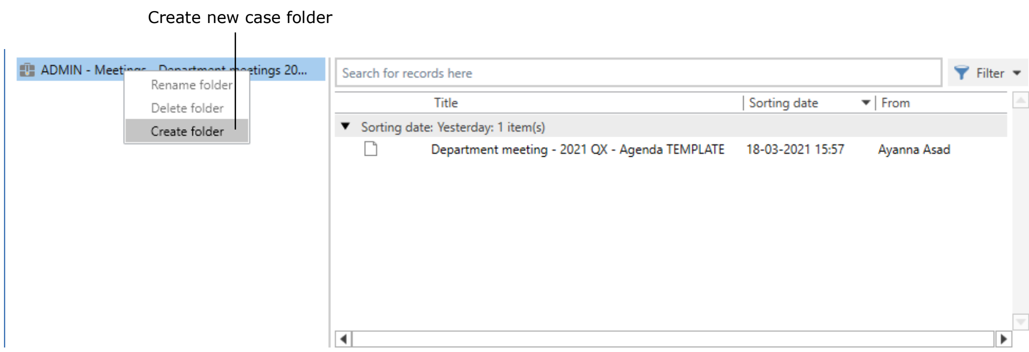
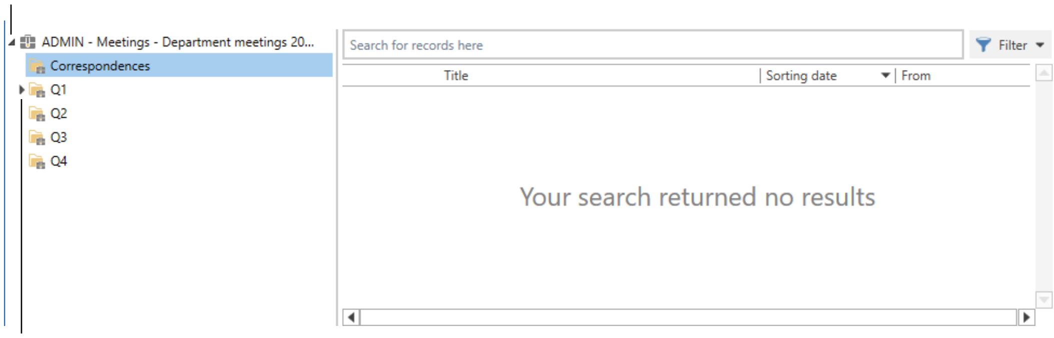


Figure 33: Create case folder

There is no limit as to the number of folder levels.

An example of a folder structure is shown in the figure below.

Subfolders are shown



Subfolders are hidden

Figure 34: Case folder structure

> **Note:** Folders are sorted alphanumerically. This means folders are not just sorted by letters but also numbers and their numeric value, if these are included in the titles of the folders. This e.g. ensures that a folder with the title "10" is not placed between the folders "1" and "2".

In this case, there are no records in the folder, "Correspondences". Records are placed in a folder by dragging them to the folder or by right-clicking on them. In the context menu, click on **Move to case folder**.

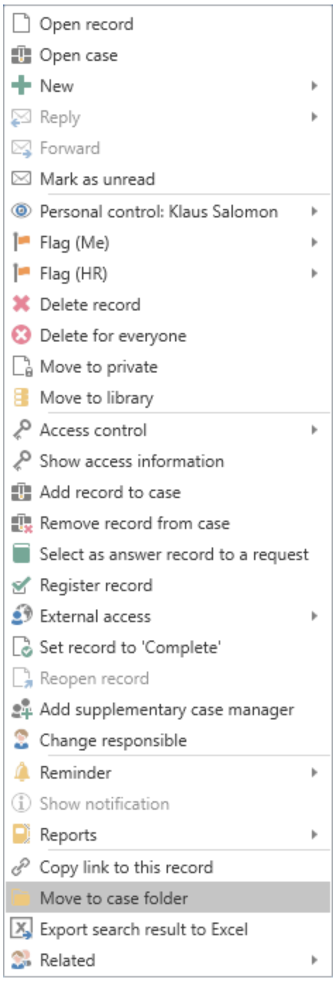


Figure 35: "Move to case folder" via context menu in the case window

The "Move to case folder" dialogue opens, and the user selects a case folder for the record. Finish by clicking on **OK**. See the example below.

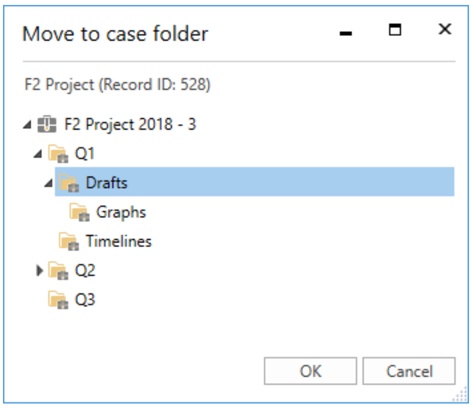


Figure 36: The "Move to case folder" dialogue

Rename folder

To rename a case folder, right-click on the folder and select **Rename folder** as shown below.

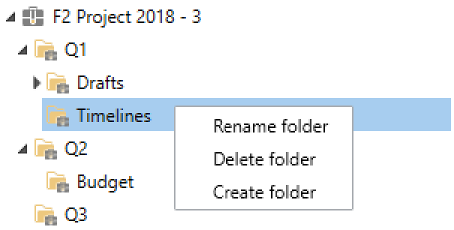


Figure 37: Right-clicking a case folder

Then enter a new name for the folder.

Delete folder

To delete a case folder, right-click on it and select **Delete folder**. The records in the deleted folder are not deleted, but remain on the case in the top folder.

Show/hide folder structure

It is possible to hide the folder structure of the case, which may be practical if a case contains many records and a complex folder structure has been created.

Click on **"Show folder structure"** in the case window ribbon to show the case folder structure.

Click on **"Hide folder structure"** in the case window ribbon to hide the case folder structure. All records will be displayed in one list.

A user can choose whether to display case folders automatically when the case window is opened.

The standard display settings for case folders are found through the menu item **Setup** on the "Settings" tab in the main window. Read more about the setting options in the user manual *F2 Desktop – Settings and Setup*.

Case records

The column settings for case records are determined by the user and can be modified through the **Columns** menu item, which can be opened by right-clicking on one of the column titles.

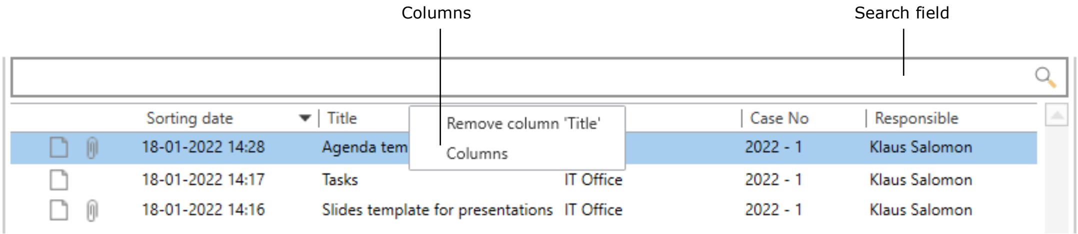


Figure 38: Select columns

Select the desired columns to display in the column overview. It is possible to search for column titles using the search field.

Use the search field to filter the result list and search for specific records, the responsible participant, dates and other metadata. The filter function is particularly useful when searching for cases containing many records. Type in the relevant search words and click on the search icon to start the search.

For more information about filtering and searching with free-text search fields and for descriptions of the respective columns, see *F2 Desktop – Searches*.

Right-click functions for cases

Right-click functions in the case window are identical to those in the main window. This makes it possible to carry out various tasks on a single record or as mass operations on multiple records simultaneously. For example, a record's case attachment can be changed using **Add record to case** or completely removed with **Remove record from case**.

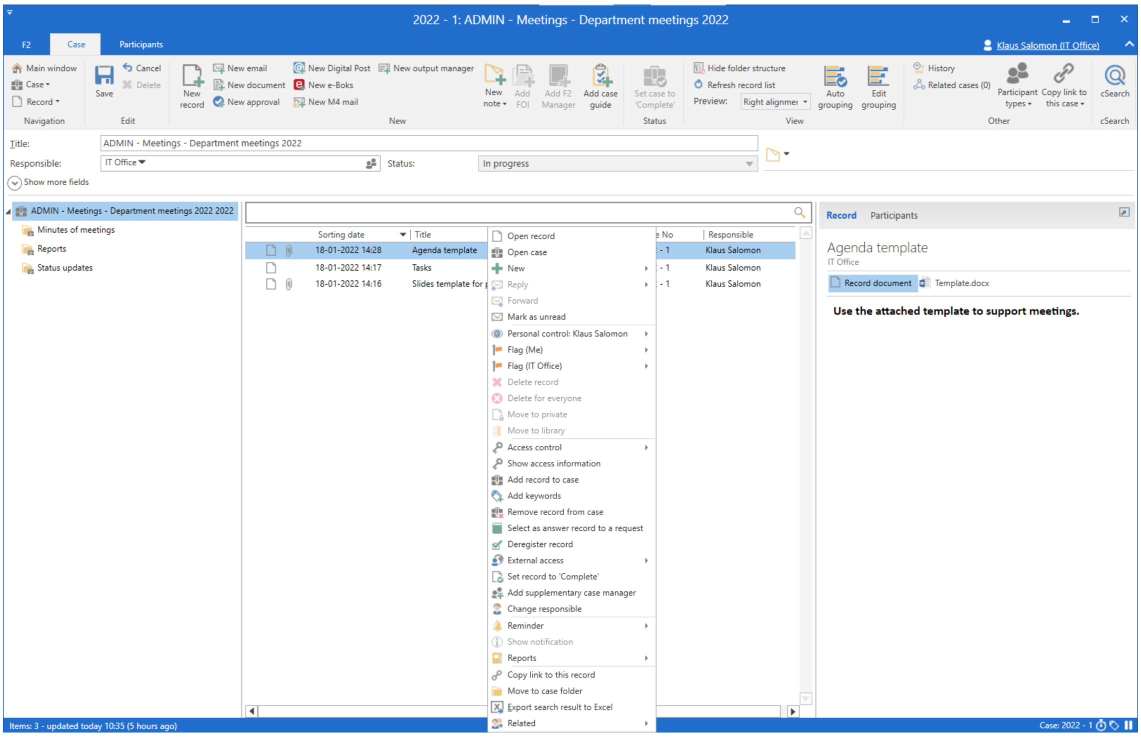


Figure 39: Right-click functions in the case window

The options in the context menu depend on the modules that the organisation has purchased. For a detailed description of each option in the context menu, see the manual *F2 Desktop – The Main Window*.

Preview of case records and documents

A preview of the records and documents of a case can be displayed in the case window.

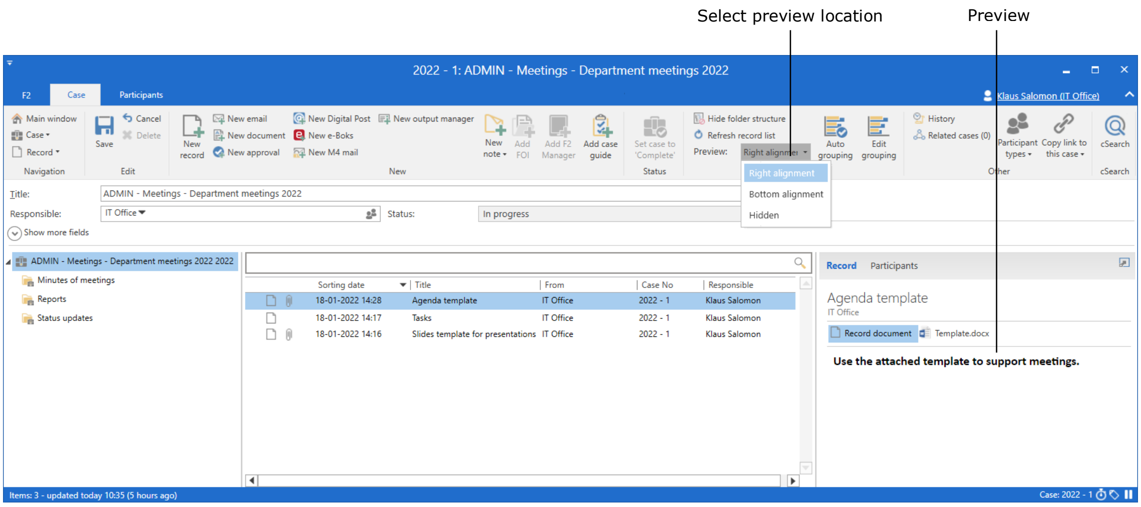


Figure 40: Preview in the case window

Select where to display the case record preview via the case window ribbon.

Click on **Preview** to open a drop-down menu. Here it is possible to choose between **Right alignment**, **Bottom alignment**, or **Hidden**.

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