F2 Desktop

Management and Organisation

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.

Management and organisation

Management and organisation

This manual describes the possibilities for managing and organising work in F2 by e.g. using deadlines, flags and reminders.

In F2, users may organise their work through personal management as well as unit-level management. Using the management functions in F2, the user can categorise records and create a useable overview of e.g. search lists. These functions include the possibility to set deadlines for the unit's casework and to decide which records should be displayed in the search lists "My inbox" and "My desktop".

Part of managing and organising work tasks is done with add-on modules such as requests and approvals. For more information on these, see the respective user manuals, *F2 Request – User manual* and *F2 Approvals – User manual*.

The following section discusses how to manage and organise work using the main window ribbon, but the functions can be found in the record window ribbon as well.

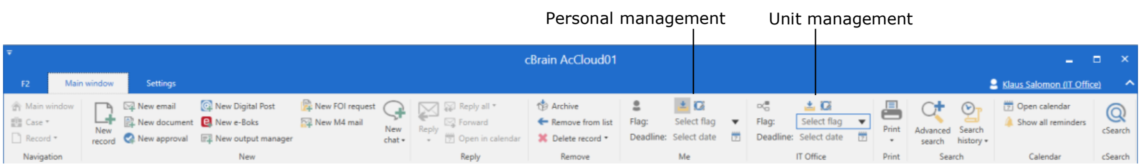


Figure 1: The menu items for personal and unit management in the main window

Personal management

The "Personal management" menu group is located in the ribbon of both the record and main windows when a record is opened or selected in the result list. The personal management values are only visible to the individual user.

The figure below shows the two buttons with which the user can choose to display a record in the inbox and on the desktop. In the middle of this menu group, the record can be flagged, and by using the bottom button the record can be given a deadline.

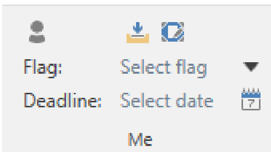
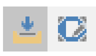
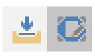
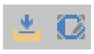


Figure 2: Personal management

Using the personal management function, the user can manage and organise their work on the record. The record can be placed as follows:

Icon	Description
	The record is located in the user's inbox.
	The record is located on the user's desktop.

Icon	Description
	The record is located in both the user's inbox and on the user's desktop. **Note**: The record is the same regardless of the list from which it is opened.
	When these icons are not highlighted, the record is shown neither in the user's inbox nor on the user's desktop. However, the record will always be retrievable from the "Archive", "My Archive" or another search in which the record matches the search criteria.

The record may also be assigned a personal management flag, which is only visible to the user. The assignable flags are defined by a user with the "Flag administrator" privilege and may vary between installations. The flag value is used in e.g. personal searches. For further information, see the *F2 Desktop – Searches* manual.

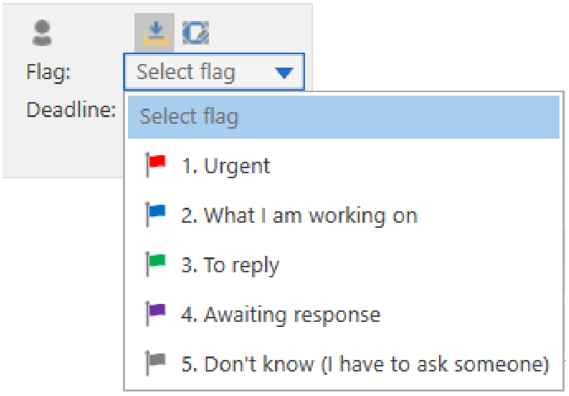


Figure 3: Assigning a personal flag

In addition, a user can also set a personal deadline for their work on the record, which is also only visible to themself. The deadline is entered directly in the field or by clicking the **calendar icon** and then choosing a deadline directly in the calendar, or by clicking the buttons "Yesterday", "Today" or "Tomorrow" as shown below.

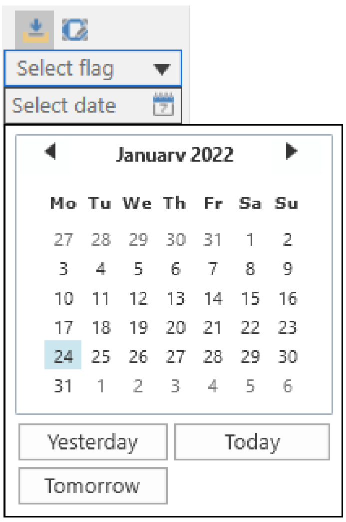


Figure 4: Assigning a personal deadline

Additionally, F2 can calculate a deadline based on user input. Enter e.g. "+7" in the date field and press **Enter**. The deadline is then set to seven days from the current date.

Unit management

The unit management function is a collaborative tool. It allows the user to involve their unit in several ways and can also be used to create a general overview of tasks and processes for unit members.

Deadlines, flags, and the ability to determine whether records are displayed in the unit's inbox or on the unit's desktop help categorise records, thereby creating a general overview and facilitating knowledge sharing.

> **Note**: Unit management can also be applied directly to incoming email records using the "Unit casework" line. This line is described in *F2 Desktop – Records and Communication*.

Users in the unit can manage and organise the appearance of the record in the unit's lists, that is, "Inbox (unit name)", "Desktop (unit name)", and "Archive (unit name)". This can be done using the "Unit management" menu group on the ribbon in either the record window or the main window.

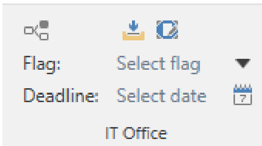
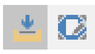
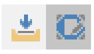
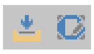


Figure 5: Unit management

The procedure is identical to that of personal management:

Icon	Description
	The record is located in the unit's inbox.
	The record is located on the unit's desktop.
	The record is located in both the unit's inbox and on the unit's desktop. **Note**: Regardless of the list from which it is opened, the record is the same.
	When these icons are not highlighted, the record is neither shown in the unit's inbox nor on the unit's desktop. However, the record will always be retrievable from the "Archive", "My Archive" or another search in which the record matches the search criteria.

Users in a unit may also assign a unit management flag, which is only visible to the unit. The assignable flags are defined by a user with the "Flag administrator" privilege and may vary between installations. The flag value is used in e.g. unit searches. For further information, see the *F2 Desktop – Searches* manual.

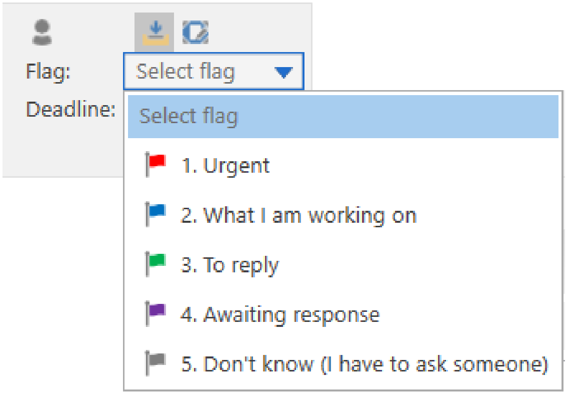


Figure 6: Assigning a unit flag

In addition, users in a unit may also set a unit deadline for their work on the record, which is only visible to the unit. The deadline is entered directly in the field or by clicking the **calendar icon** and then choosing a deadline directly in the calendar, or by clicking the buttons "Yesterday", "Today" or "Tomorrow" as shown below.

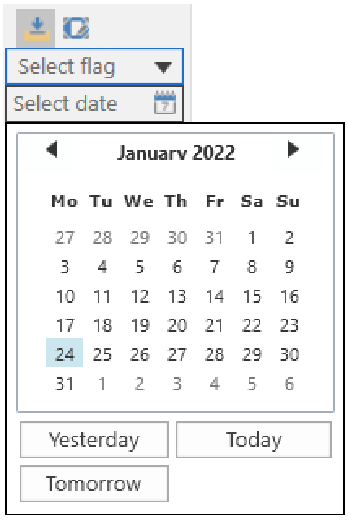


Figure 7: Assigning a unit deadline

Additionally, F2 can calculate a deadline based on user input. Enter e.g. "+7" in the date field and press **Enter**. The deadline is then set to seven days from the current date.

Archiving, deleting and removing records

Using the "Remove" menu group on the main window ribbon, it is possible to archive, delete, and remove records from specific lists.

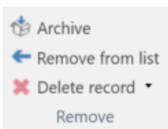


Figure 8: The "Remove" menu group

These functions are described in the following sections.

Archive

Click on **Archive** to archive the record(s) selected in the result list. When a record is archived, F2 helps the user clean up. This means that the record is automatically removed from "My inbox" and "My desktop".

Furthermore, the record's status can be changed from "In process" to "Complete" if the user is responsible for the record. In other words, F2 helps the user by updating the "Status" metadata field.

When a record is archived, the following dialogue opens.

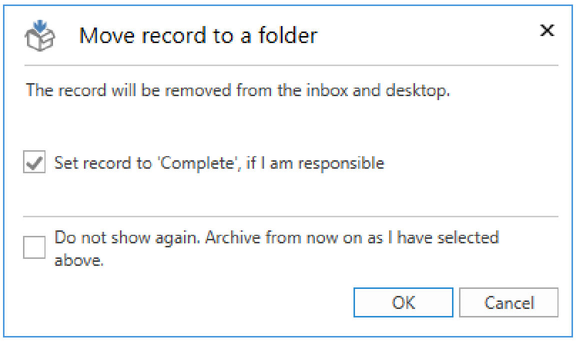


Figure 9: The "Move record to a folder" dialogue

Remove from list

The "Remove from list" function is used to remove records from the list that is currently displayed in the main window. This function is available for the following lists and search lists created from these lists:

- My inbox
- My desktop
- The unit's inbox
- The unit's desktop.

If a record is removed from a list, it can still be found on other lists on which it has been placed. The record will still be located in the "Archive", "My archive" and on any search lists created from these.

Delete record

The "Delete record" menu item works in one of two ways depending on whether the record is shared. Users with the "Can delete shared records for everyone" privilege also have the option of selecting "Delete for everyone" in a drop-down menu.

Figure 10: The "Delete record" drop-down menu.

Read more about deleting records in *F2 Desktop – Records and Communication*.

Teams

In F2, a team is made up of users from the same authority. Team members do not have to belong to the same unit. Teams can be useful in different contexts in F2:

- As an access group in the field "Access restricted to" on both records and cases.
- As a supplementary case manager on a record or a case.
- As an email recipient (can be configured).
- As a participant or stakeholder at ad hoc meetings (add-on module).

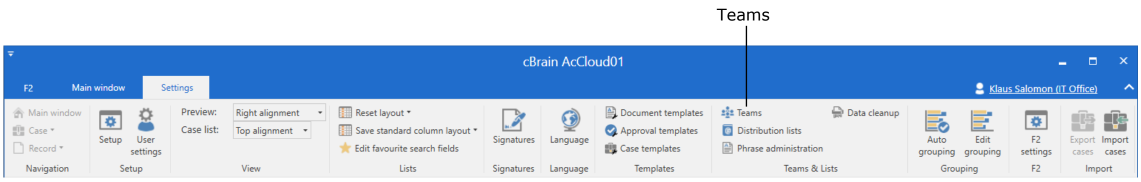


Figure 11: Teams on the "Settings" tab

Teams are created and maintained from the main window's "Settings" tab by clicking the **Teams**. Users with the "Team creator" privilege can create teams.

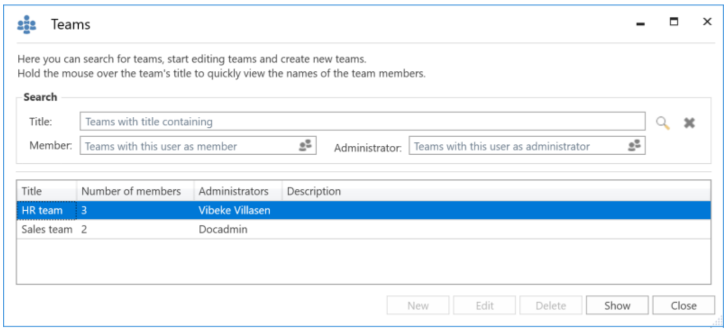


Figure 12: The dialogue listing the teams of the organisation

When creating or editing a team, the organisation may designate one or more team administrators to maintain the team.

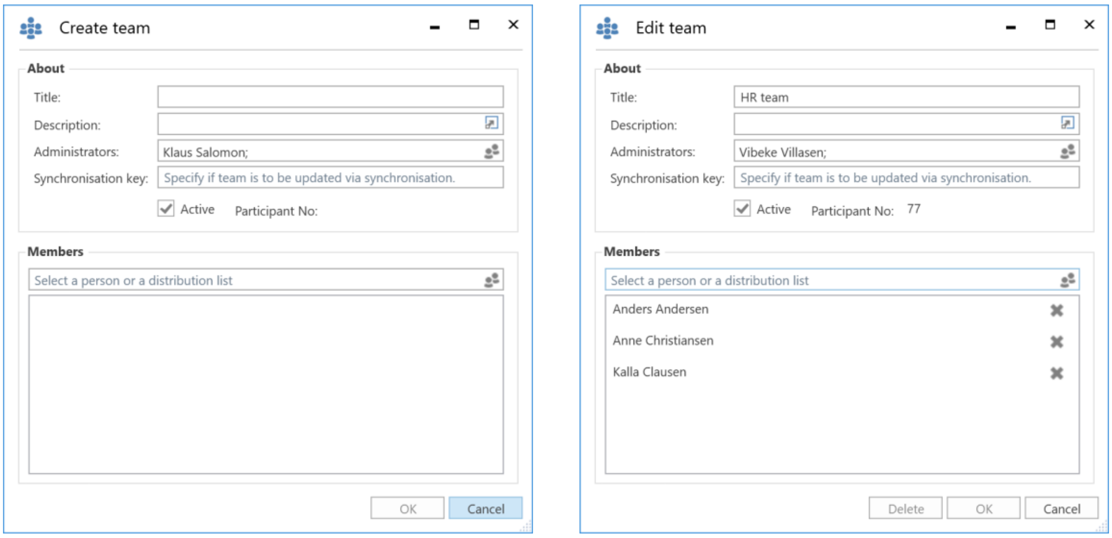


Figure 13: The dialogue for creating and editing a team

Any user may search for teams in the dialogue window, but only users with the "Team creator" privilege may create and edit teams. For further information, see the *F2 Desktop – Administrator* manual.

Reminders

Reminders fall under the category of personal management and offer the user the option of pop-up reminders on due dates.

Reminders are set up by right-clicking on a record in the main window. In the context menu, select **Reminder** and then **Add Reminder** as shown below.

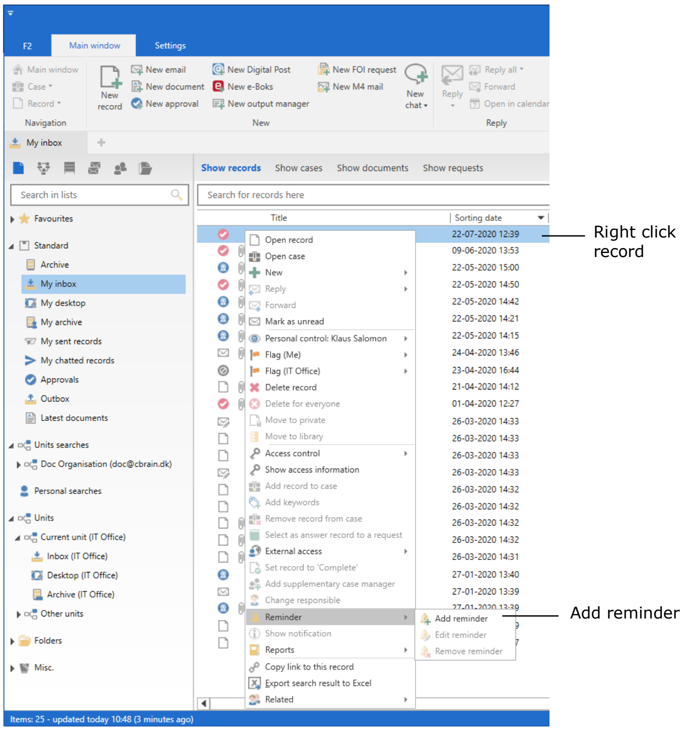


Figure 14: Add reminder

The reminder is then set up in the dialogue that opens. Add a date, time, and a description if needed. Then click **OK**.

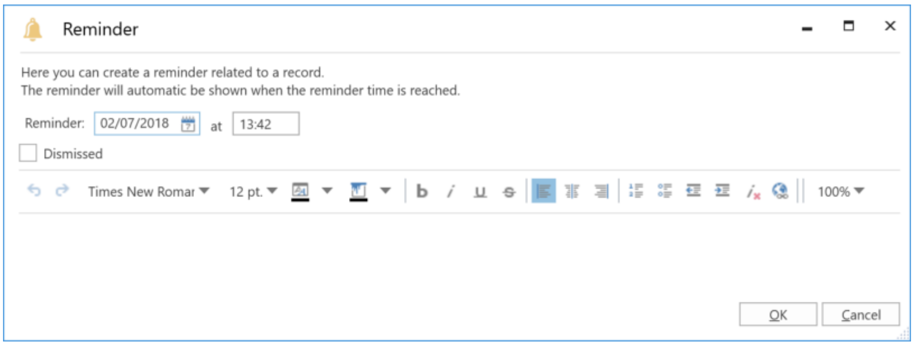


Figure 15: Create a reminder

The reminder is created and added to the record from which the context menu was opened. This means that a reminder is always associated with a record. A record with a reminder shows a reminder icon in the result list.

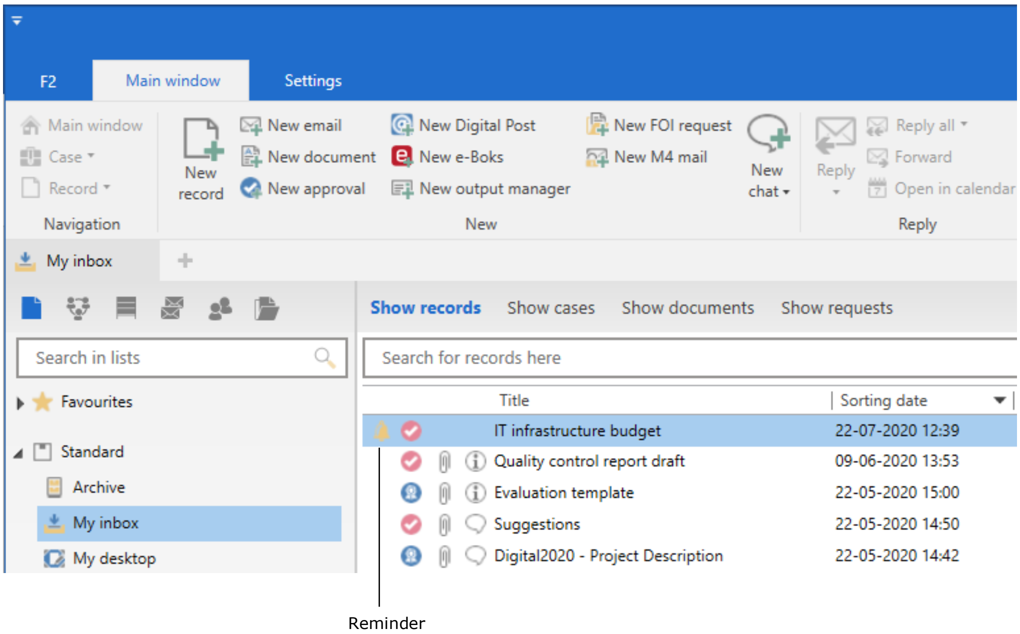


Figure 16: Reminder icon in the result list

When a reminder has been created, it may be either edited or removed by right clicking the record. In the context menu, click **Edit reminder** or **Remove reminder**.

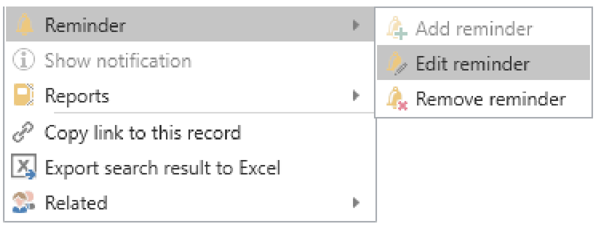


Figure 17: Edit or remove reminder in the context menu

At the time the user has selected for the reminder, the "Reminders" dialogue appears on the screen. The dialogue appears even if the F2 window is not active. For further information on this dialogue, see the section *The "Reminders" dialogue* below.

To view all the user-made reminders, go to the main window ribbon and click **Show all reminders**. This opens the "Reminders" dialogue which is described in the section below.

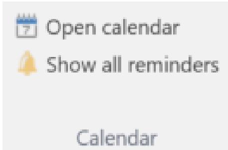


Figure 18: "Show all reminders"

The "Reminders" dialogue

This dialogue is shown when a reminder is due or when the user clicks the **Show all reminders** menu item on the main window ribbon.

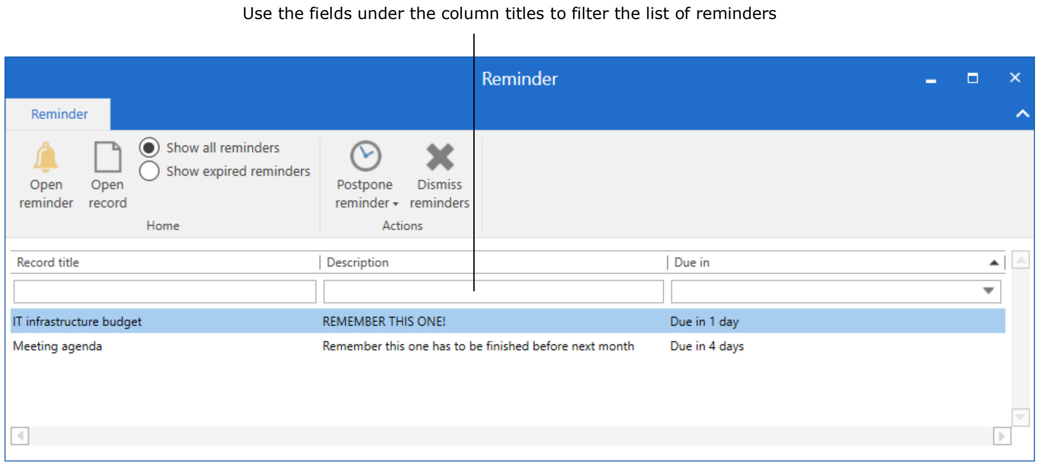
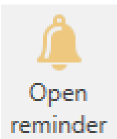


Figure 19: A reminder is selected

The functions are described in detail below.

Function	Description
	Opens the reminder for editing.
	Opens the record with which the reminder is associated.

Function	Description
Show all reminders (selected) Show expired reminders	With "Show all reminders" selected, all reminders are shown – both future and overdue ones.
Show all reminders Show expired reminders (selected)	With "Show expired reminders" selected, only overdue reminders are shown.
Postpone reminder	Postpones the reminder by an interval chosen from a drop-down menu. The intervals are predetermined, but vary in length from a few minutes to several days.
Dismiss reminders	Dismisses all reminders. This is essentially like deleting the reminder.

The "Quick access" toolbar

The "Quick access" toolbar is found in the upper left corner of the main window. To access the toolbar, click the icon.

A user may add menu items from the main window's ribbon to the quick access toolbar. This provides the user with quick access to the features most frequently used for performing tasks in F2.

Note: The record and case windows have similar toolbars.

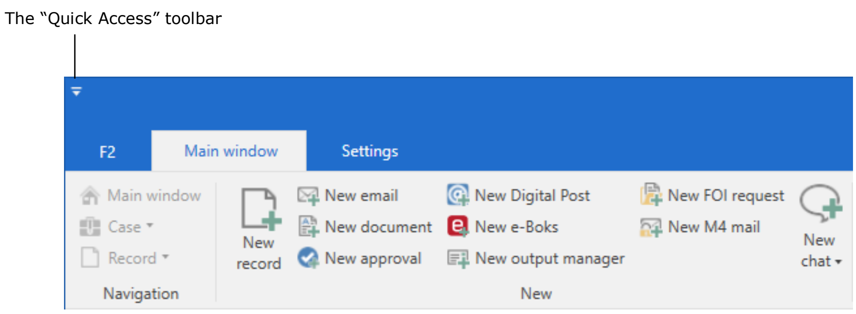


Figure 20: The "Quick access" toolbar in the main window

Customising the "Quick access" toolbar

To add menu items to the "Quick access" toolbar, click the drop-down arrow icon in the upper left corner of the main window. A drop-down menu opens from which it is possible to tick off menu items that are then added to the toolbar.

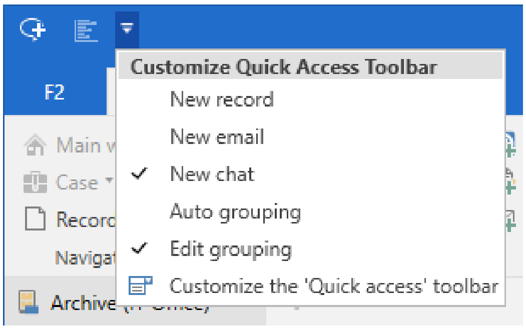


Figure 21: Customise the "Quick access" toolbar

The drop-down menu includes a default list of F2 menu items.

To add additional menu items to the toolbar, click on **Customize the 'Quick access' toolbar** at the bottom of the drop-down menu. The dialogue below opens.

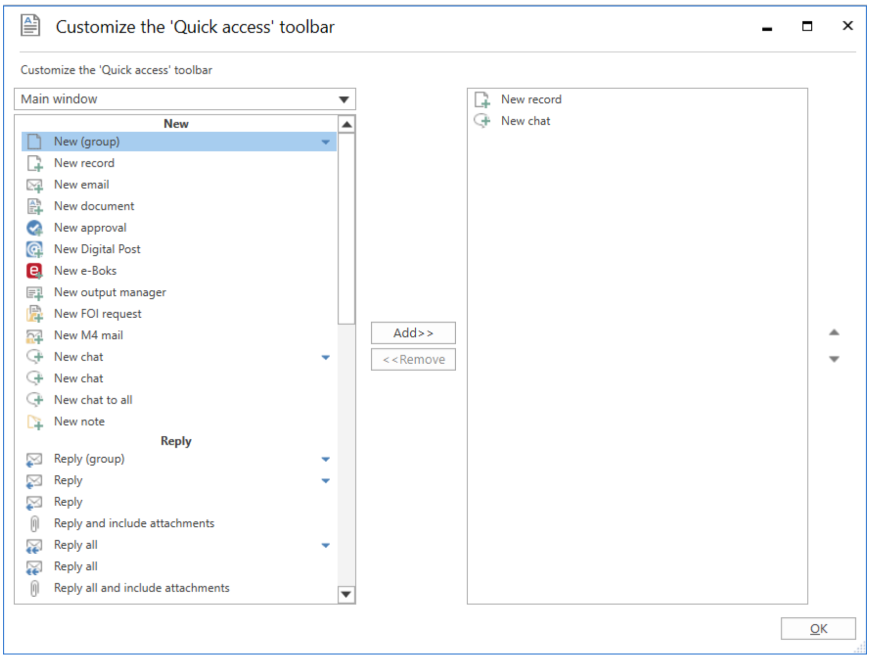


Figure 22: The "Customise the 'Quick access' toolbar" dialogue

Click on the **drop-down arrow** in the drop-down menu to select a tab from which to add menu items.

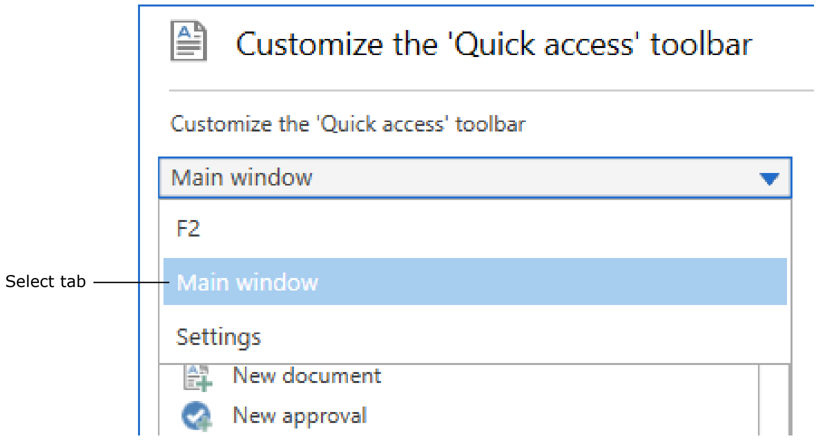


Figure 23: Select tab

Below the drop-down menu, select the menu items to add to the pane on the right.

Then click **Add** to transfer the selected menus item to the pane. Finish by clicking **OK**.

The menu items added to the pane on the right are then added to the toolbar.

> **Note**: It is not possible to click the drop-down arrows on menu items in this dialogue. When a menu item with a drop-down arrow has been added to the toolbar, the drop-down arrow will work as usual.

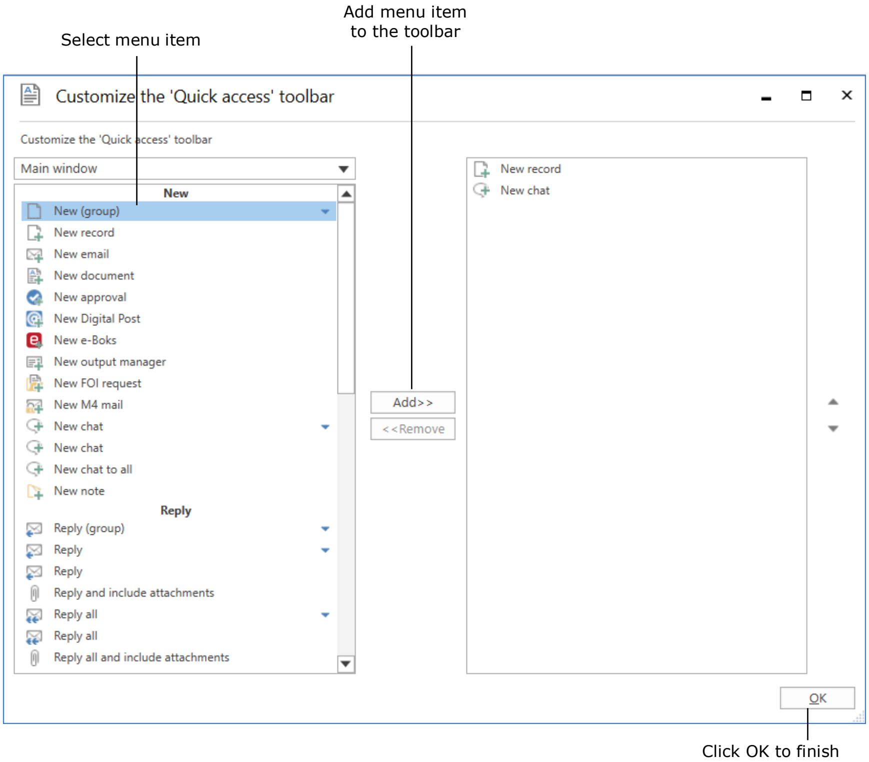


Figure 24: Add menu items

Note: It is also possible to add a menu item to the toolbar by right-clicking on it in the ribbon of the main, record or case window and selecting **Add to Quick Access Toolbar**.

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