F2 Desktop

Records and Communication

Version 9

9.0.0.15280

Table of Contents

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 supports ensure 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.

Working with records

This manual describes working with records in F2 as well as F2's various means of communication.

The manual is divided into the following subjects:

- **The record overview**: describes the key elements of a record in F2.
- **Record access levels**: describes the various levels of access on a record and their management.
- **Communication**: describes the communication functions in F2 that are related to records.
- **Record metadata**: describes the record metadata.
- **Record functions**: describes the functions of the record window.

Creating a new record

Create a new record by clicking **New record** in the ribbon of either the main, record or case window.

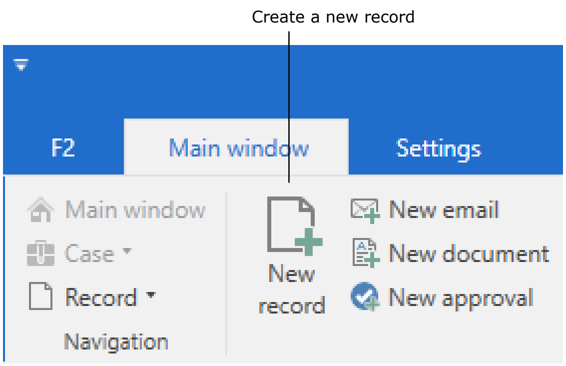


Figure 1: The "New record" menu item

This opens the following dialogue in which the user must enter the basic information required to create the new record.

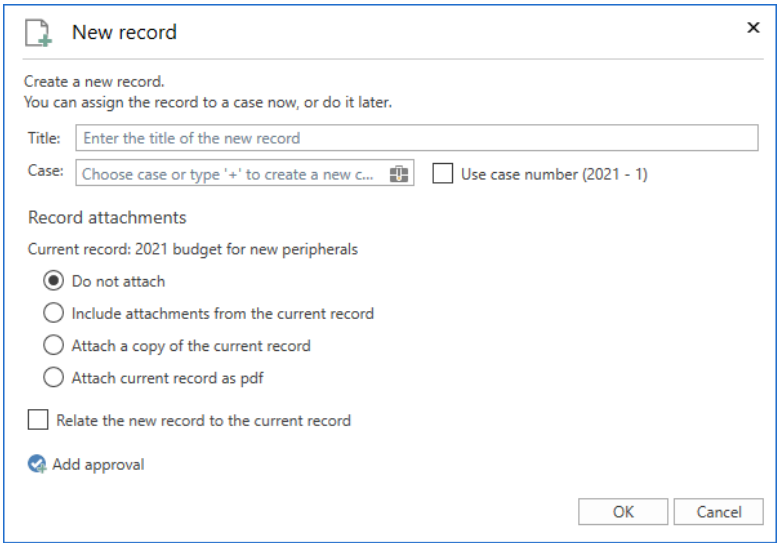


Figure 2: Creating a new record

When creating a new record, the following fields must be reviewed:

Field	Description
"Title"	Enter the title of the record here.
"Case"	Add an existing case to the record by entering the case number or case title in this field. It is possible to search for a case by clicking the case icon . A new case can also be created for the record. For further information on attaching records to cases, see *Adding a record to a case*. For further information on cases and their creation, see the *F2 Desktop – Cases* manual. **Note**: Suggestions in the "Case" field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
"Use case number"	If this box is ticked, the new record is added to the case that was selected or open (possibly via another record) when the new record was created. **Note**: Manually delete the case number proposed by F2 to untick this box.
"Record attachments"	The following options are only active if the user has selected an active record before clicking on **New record**: • **Do not attach**: No records or record attachments are carried over to the new record.

Field	Description
	• **Include attachments from the current record:** Attachments from the selected or open record are copied to the new record when it is created. • **Attach a copy of the current record:** Attaches the record selected before the creation of the new record. This option attaches the documents and metadata of the record as a PDF file. • **Attach current record as PDF:** Compiles all documents of the record selected before the creation of the new record and attaches them as a PDF file.
"Relate the new record to the current record"	Tick this box to set the new record as answer record to the one selected before clicking **New record** in the main, record or case window.
"Add approval"	Add an approval process to the record*.* Requires the add-on module F2 Approvals. For further information, see the *F2 Approvals – User manual*.

Click **OK** to open the record window.

The user may decide how to display the metadata fields of records from the "Settings" tab in the main window. Click on **Setup** on the ribbon and navigate to "Record view" to choose which fields are displayed by default. For further information, see the *F2 Desktop – Settings and Setup* manual.

Note: To ensure that there are no records without titles in F2, a record cannot be saved or sent unless it has a title.

When a record cannot be saved, a warning icon appears in the upper right corner of the record window, next to the user identification. Hover the cursor over the icon for additional information.

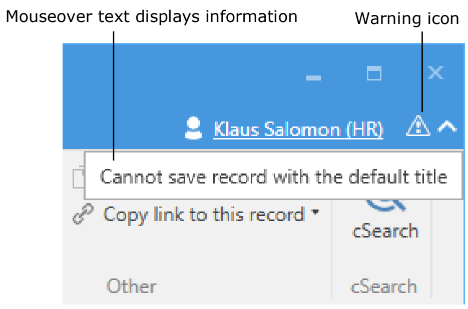


Figure 3: Warning for new record without title

Save unsaved changes when starting F2

If changes have been made to records that were not saved the last time F2 was open, it is possible to save the changes when F2 is reopened. In this case, the dialogue below appears, and the user must choose whether to save or discard these changes.

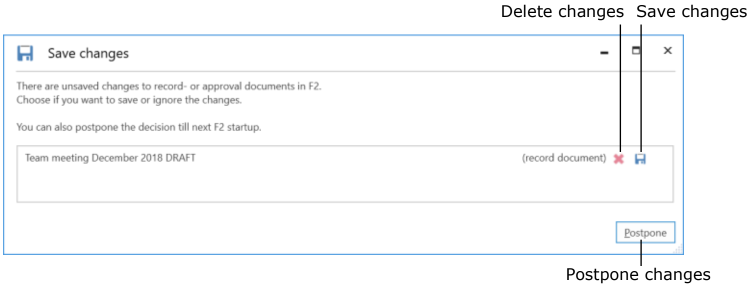


Figure 4: Save changes on restart

In addition to saving or discarding the changes, the user may postpone the decision. Next time the record or approval document is opened, F2 will ask the user to either save or discard the changes.

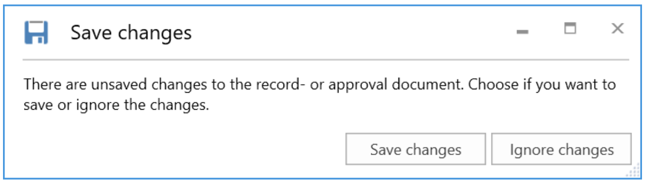


Figure 5: Save changes to record or approval document

The record window structure

This section provides a brief introduction to the structure of the record window. Each function and field in the record window is described in detail in later sections.

The record window can be accessed in two ways:

- By creating a new record
- By opening an existing record.

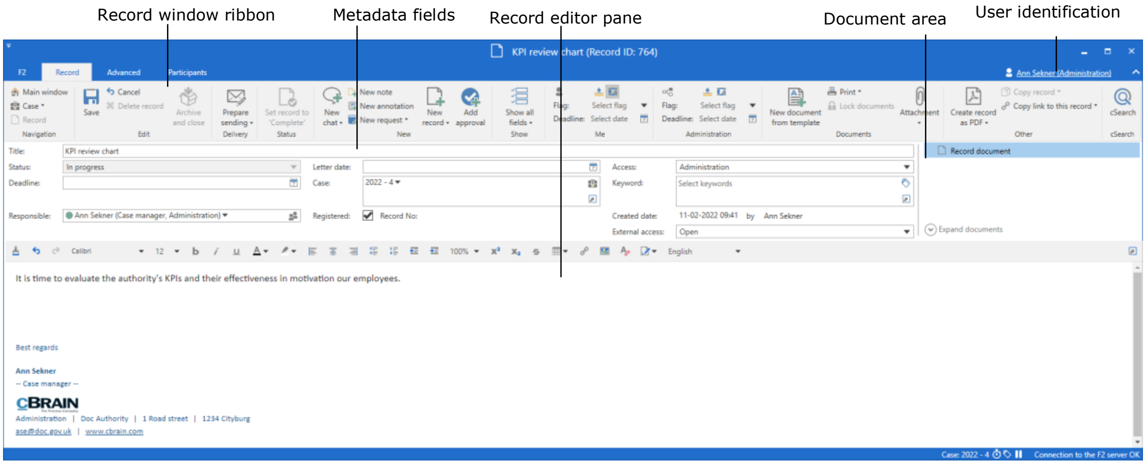


Figure 6: Record window structure

The centre top of the record window (the title bar) displays the record's title and ID number. This lets the user check which record is open at a glance.

The ribbon of the default "Record" tab contains menu items for communication, processing and managing the record similar to the functions of the main window ribbon. The "Advanced" tab contains functions pertaining to delivery types, clean-up, version management and record history. The "Participants" tab provides the user with an overview of the involved participants. The "F2" tab lets the user access F2's help functions. Further information on the menu items can be found in the sections *Menu items on the record ribbon*, *Menu items on the "Advanced" tab* and *Menu items of the "Participants" tab.* The "F2" tab is described in further detail in the *F2 Desktop – The Main Window* manual.

At the top right corner of the window is the user identification which shows the current user's name and unit.

Below the record window ribbon there are several metadata fields. Here the user can specify the user responsible for the record, the deadline, any keywords, etc.

To the right of the metadata fields is the document area which shows any attached documents. For further information on the document area, see the section *The record's documents*.

The lower part of the record window contains the record editor pane (which displays the record document), in which the user enters and edits the text.

The content of the record window changes depending on whether the record document or an attached document has been selected. Clicking on an attached document will display a preview of this document instead of the record document. For further information on the record document editor, see the section *The record editor*.

Record access

All users are able to access all data in F2 if they have the required rights to do so. F2's access levels, access restrictions and access rights determine which users have access to which data. A record's access level is determined by the individual user and to a certain extent the guidelines of the organisation.

In F2, access to a record is managed in the record window. Access in F2 is determined by two elements: access level and access restriction. The intersection of these determine who can access a given record.

The access level is set in the "Access" metadata field, and the access restriction is set in the "Access restricted to" metadata field on a record or in the "Limited access" field on a case, if any is attached.

For further information on the record metadata fields, see the *Record metadata* section.

For further information on access restriction on cases, see the *F2 Desktop – Cases* manual.

The following sections describe F2's access levels and rights.

Record access levels

There are three access levels in F2:

- **Involved**: Only users and units actively involved in the record can find it when performing a search. This is the most restrictive access.
- **Unit**: In addition to participants actively involved in the record, users in the record manager's unit can also view the record.
- **All**: All users within the authority can search for and view the record.

A new record is created with "Involved" as the default access level, but the responsible user can change the level manually. The access level changes automatically if the record is shared with other users.

Note: Users do not receive notifications about changes made to a record's access level.

Note: The default access level for newly created records can be customised. Configurations are performed in cooperation with cBrain.

User access rights to a record

Users have one of three access rights to a record. These are:

- **Read access**: Does not allow the user to edit the documents attached to the record or the record metadata (including the record document).

- **Write access to documents**: Allows the user to edit the documents attached to the record (including the record document), but not the record metadata.
- **Full write access**: Allows the user to edit both the documents attached to the record (including the record document) and the record metadata.

The above access rights are assigned to a user in one of the following ways:

- Access to the record: Based on the access level specified in the "Access" metadata field in the record.
- Record sharing: By sharing the record in F2 with a user, e.g. via chats, sending, being added as a supplementary case manager, etc. The methods for sharing a record are discussed in the *Communication* section.

> **Note**: A user may find and open a case only if they have read access to at least one of its records. However, users cannot find and open a case if they are excluded by its access restriction. For further information on how a case's access restricton affect its records, see the *Advanced metadata fields* section.

User access rights determined by a record's access level

A record always has an access level. If the record has not been shared, access rights to the record depend on its specified access level and whether a user is in the same unit as the record manager. The record manager is the user who is specified in the "Responsible" field on the record.

The table below shows F2's access level and how they affect other users' access rights:

Access level specified on the record	**Users in record manager's unit**	**Users not in record manager's unit**
"Involved"	No access to the record	No access to the record
"Unit"	Full write access to the record	No access to the record
"All"	Full write access to the record	Read access to the record

Generally, the above applies until the record is shared in F2. This is covered in the next section.

User access rights when a record is shared

When a record is shared in F2, others users become involved on the record. The sharing may happen through chats, notes, requests, adding supplementary case managers, etc. The basic principle for access when sharing a record in F2 is this: The user with whom the record is shared is assigned the access right one tier lower than that of the user sharing the record.

Note: A user's access rights can never be reduced through the sharing of a record, only expanded.

However, if a user is added as a record participant or supplementary case manager, the above does not apply.

Users added to the "Record participants" field always receive read access to the record.

The access rights of supplementary case managers depend on the configuration of the user who adds them. For further information, see the *F2 Desktop – Settings and Setup* manual.

Communication

F2 offers various means of communication. Each of these is intended for use in a specific situation.

Sometimes an email is the best form of communication, sometimes it is more efficient to use the chat feature or the option of reallocating responsibility for a record instead.

Below is a list of the various forms of communication in F2.

Communication form	Description
Email	Send, forward and reply to records. These functions are used for formal communication and for communication external to F2. Unlike an external email, when an email record is sent internally in F2, recipients do not receive a copy of the record. All F2 users see the original record in their inbox. Sent records cannot be modified. For further information, see the *Email* section.
Chat	Chat is used for informal communication in relation to tasks or other types of coordination and knowledge sharing in the organisation. Since chats must be created on a record, the context of the chat will always be clear, ensuring effective communication. For further information, see the *Chat* section.
Note	Like the chat, a note is an informal type of communication. Unlike the chat, the note is visible to all users with read access to the record to which it is added. Recipients can be added to the note to notify them of its creation. For further information, see the *Notes* section.
Responsible user/unit	Allocation of responsibility is used when assigning tasks to a unit or a user. The intention is to allocate tasks in F2 as one would place a task in a physical inbox or on a colleague's desk. For further information, see the *Allocation of responsibility* section.

Communication form	Description
Supplementary case manager	Adding a user or unit as a supplementary case manager in the "Suppl. case mgr." metadata field notifies the user/unit that they are now a supplementary case manager on the record. This means that they now have access to edit the record. The extent of this access is specified in the personal settings of the user who adds them. Further information on personal settings can be found in the *F2 Desktop – Settings and Setup* manual. For further information on adding a supplementary case manager, see the *Supplementary case manager* section.
Annotation	An annotation adds formal information visible to all users to a record. For further information, see the *Annotations* section.
Request (add-on)	In F2, it is possible to request tasks from other users/units/authorities within the same F2 installation. For further information, see the *F2 Request – User manual.*
Approval (add-on)	In F2, it is possible to submit records for a formal approval with other users and units within the F2 installation. For further information, see the *F2 Approvals – User manual*.

The following section describes the functions and fields for the various types of communication.

Email

In F2 it is possible to send, forward and reply to email records in the style of traditional email systems.

Emails may be sent internally or externally and are mainly used for formal communication. When an email record is sent internally in F2, recipients do not receive a copy, but see the original record in their inbox.

The email record's icon and its status text in the main and record windows show if it has been forwarded or replied to, regardless of who has performed the action.

This means that the icon is shown on a record that has been replied to, and the icon is shown on a forwarded record, also when either action has been performed by another user. For a complete list of icons shown in the result list, see the *F2 Icon Appendix*.

New email

Email records can be created in either a simple mode or a detailed mode. The simple mode is similar to emails created in other email clients, while the detailed mode is based on F2's record window.

Note: The simple email mode can only be enabled if the organisation's configurations allows it. For further information, see the *F2 Desktop – Settings and Setup* manual.

Click on **New email** in the main, record or case window to create a new email record.

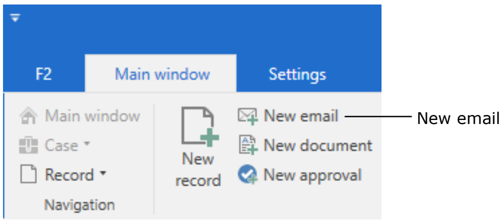


Figure 7: The "New email" menu item in the main window

The record is created in simple or detailed mode depending on the user's personal setup. For detailed email records, it is possible to decide how many metadata fields are shown on the newly created email record. For further information on these options, see the *F2 Desktop – Settings and Setup* manual.

New simple email

When an email record is created in simple mode, the "New email" window opens instead of the record window, and only the delivery fields are visible.

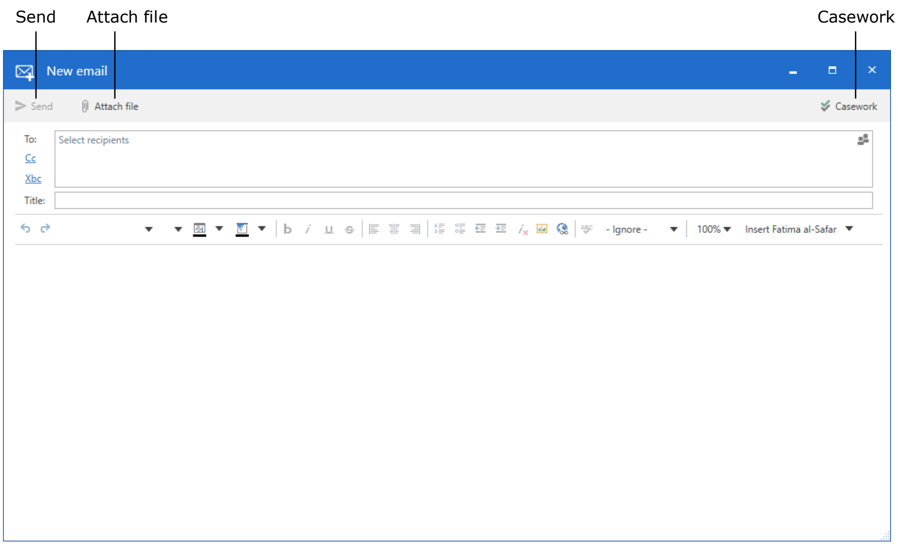


Figure 8: The "New email" window

In the “New email” window, most of F2’s case processing functions are disabled. This means that creating and sending simple emails is faster than detailed email records, but several functions are different:

- Case help is disabled. Consequently, simple emails may not comply with the guidelines of the authority. For further information on case help and its purpose, see the *Case help* section.
- No clean-up is performed, though the email is removed from “My desktop” when sent. For further information about clean-up when sending, see the section *Menu items on the “Advanced” tab*.
- Sender cannot be changed. The user’s default sender is listed as both creator and sender of the email.
- Attachments cannot be edited.
- The format of attachments cannot be changed before sending because the Metadata Assistant is not supported. For further information on attachment format, see the *Format selector for emails* section.
- The email text is not autosaved.
- Signatures from the detailed email format must be edited before they can be used with simple emails.

Click **Casework** in the upper right corner to switch from simple mode to the detailed record window with the delivery fields visible and all regular functions enabled. Sending email records is described in the *New detailed email* section.

An email sent in simple mode does not affect how it is received. A simple mode email sent internally in F2 is received as a regular incoming email with the same processing options for the recipient. The access level of simple mode emails is determined by the organisation’s choice of access level for new records, which is “Involved” by default.

In simple mode, files on the local computer can be attached by clicking **Attach file** in the ribbon. The function is described in the *Attach file* section.

Note: It is not possible to attach a template, document, or record from F2 in simple email mode.

New detailed email

Creating a new email record opens detailed mode (depending on personal setup). Detailed mode can also be accessed from the simple email window by clicking **Casework**.

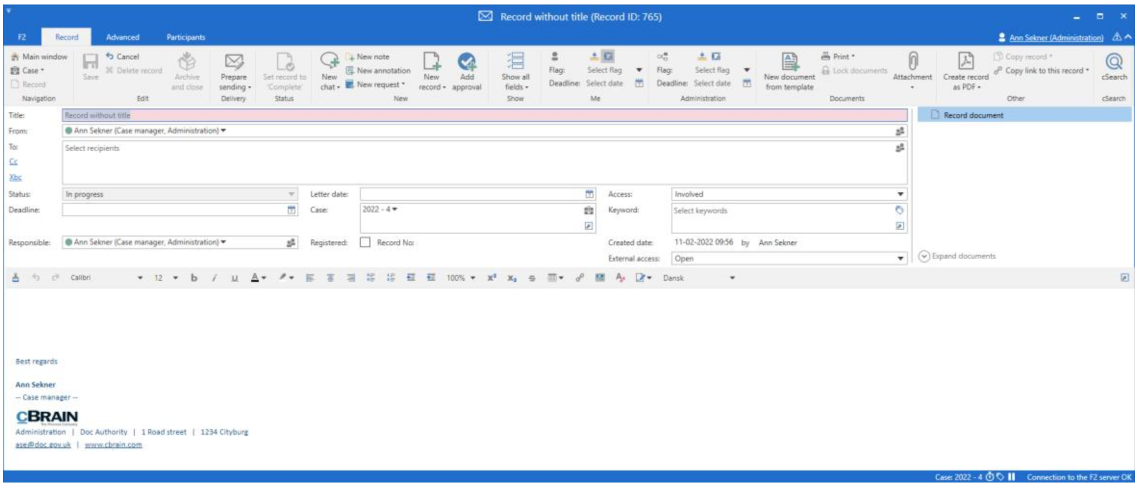


Figure 9: Create email record

The email record's metadata fields

When creating an email record, whether in simple or detailed mode, the user must consider the following metadata fields:

Field	Description
"Title"	Corresponding to the subject field in an email, the user must enter a title in the email record window. Contrary to the standard record creation process in which F2 needs the user to enter a title before the record is created, this field is not filled in automatically.
"From"	This field is only visible in detailed mode and is filled in automatically when a new email record is created. It is possible to select whether the default sender for email records is the user or the user's unit. For further information, see the *F2 Desktop – Settings and Setup* manual. F2 allows for the following to be inserted as sender: • The user • The user's unit • Another user in the unit • The authority. When text is entered in the field, F2 will search for names of internal users, distribution lists and external participants. Participants may also be added by clicking on the participant icon, which opens the "Choose participant" search dialogue. For further information on participant searches, see the section *The "Choose participants" dialogue*.
"To"	Enter the recipient(s) of the email record here.

Field	Description
	There are three ways to add participants as recipients: • By typing in the field directly. F2 will search for names of internal users, distribution lists and external participants. • By clicking the participant icon, which opens the "Choose participant" search dialogue. For further information on participant searches, see the section *The "Choose participants" dialogue*. • By copying and pasting email addresses from e.g. an Excel file.
"Cc"	Enter any Cc recipients of the email record here. Cc recipients are added in the same manner as "To" recipients.
"Xbc"	Enter any Xbc recipients of the email record here. Xbc recipients are added in the same manner as "To" recipients. Adding an external participant here is similar to adding a recipient in the "Bcc" field of traditional email systems. There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

Note: Suggestions in the "To", "Cc", and "Xbc" fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

The "Choose participants" dialogue

Click the participant icon in the "To", "From", "Cc", or "Xbc" fields to open the participant search dialogue.

Figure 10: The participant icon

In this dialogue the user selects participants to add to the desired field. To add a participant and close the dialogue, double-click the **participant's name** or select the name and click on the **OK** button. To add a participant and keep adding, click the **Add participant(s)** button. The dialogue will show any added participants in the "Chosen participants" list.

By clicking on **Advanced search**, it is possible to perform an advanced search for participants. For further information on this, see the *F2 Desktop – Searches* manual.

Click on **OK** when all desired participants have been added to the list.

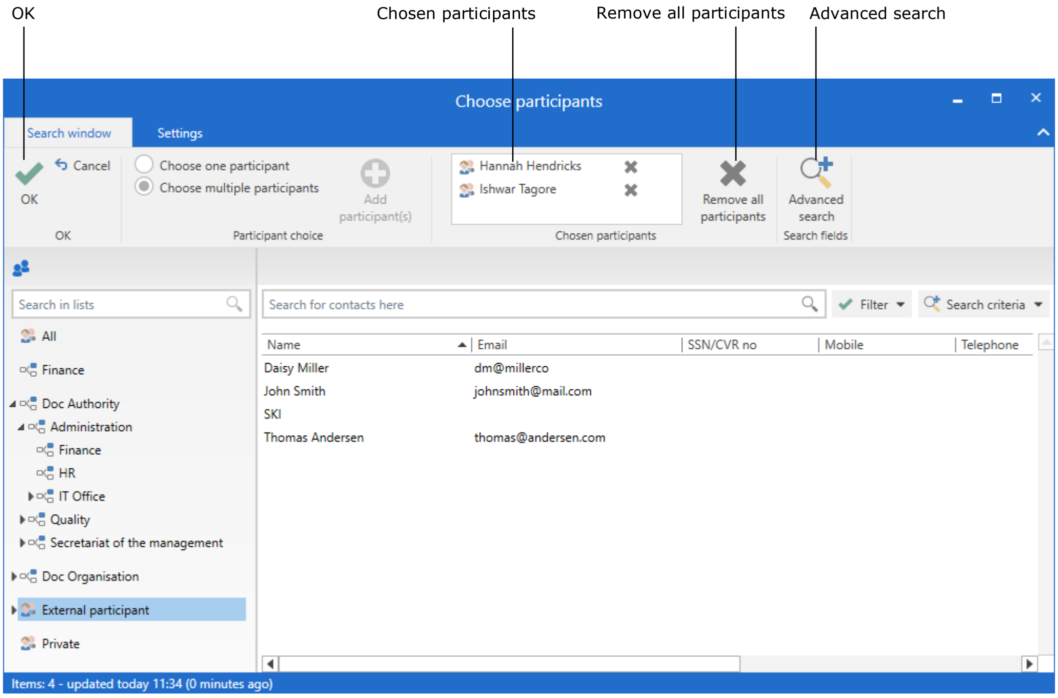


Figure 11: The "Choose participants" dialogue

Further information on creating participants and editing their placement and properties, see *F2 Desktop – Administrator*.

Drag and drop participants

A selected participant may be dragged and dropped between the "To", "Cc", and "Xbc" fields. A participant can be copied to another field by holding the **Ctrl** key while using drag and drop.

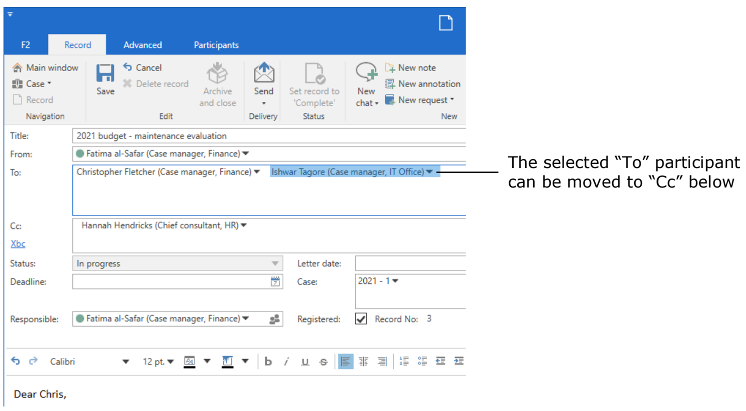


Figure 12: Drag and drop participant

Display participants

Recipients in the "To", "Cc", and "Xbc" fields can be displayed as a list, making it easier for the sender to see their names.

Clicking on  expands the field and displays a list with all recipients.

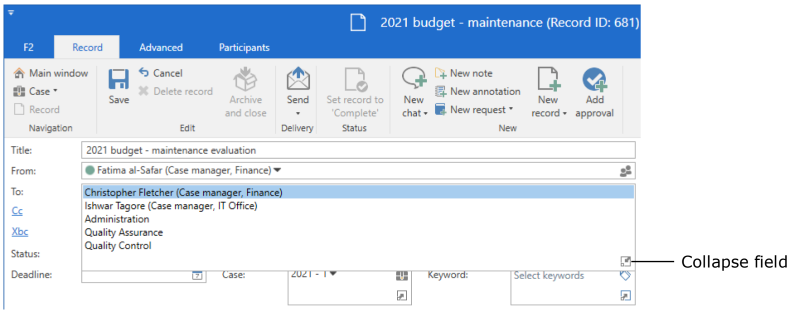


Figure 13: Participants displayed as a list

It is possible to view additional information on an added participant. Hover the cursor over the participant's name to view a tooltip with online status, out of office status (if any), and details regarding their job roles.

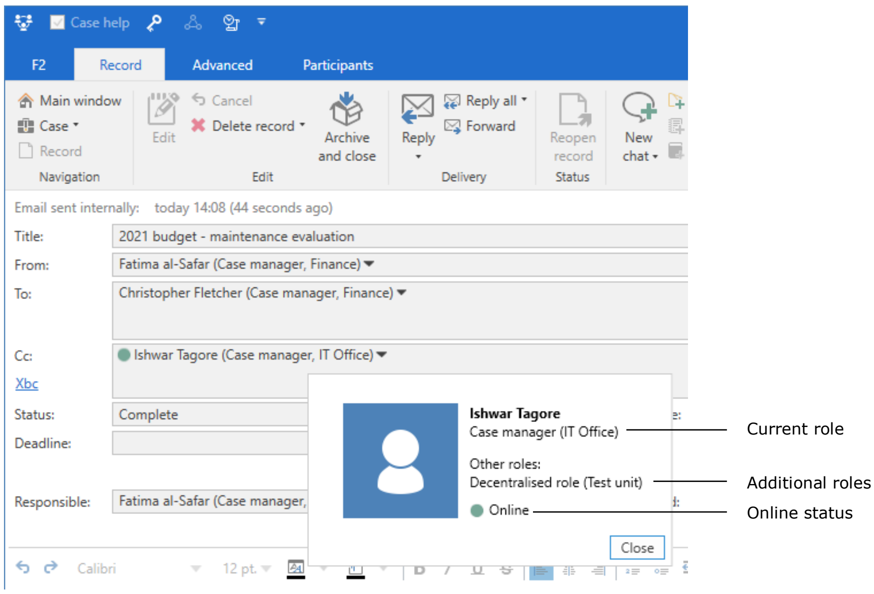


Figure 14: Participant tooltip

The participant properties can be accessed from the email record by right-clicking on the participant and selecting **Show properties**.

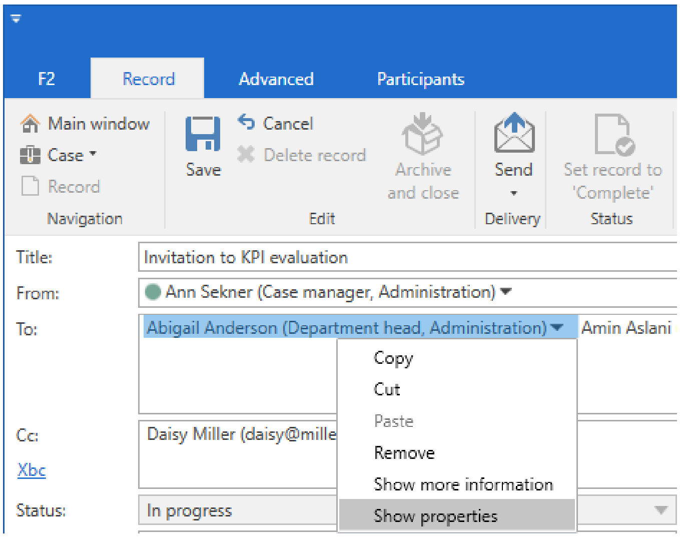


Figure 15: Participant properties

This will open the participant properties dialogue named after the participant.

The participant properties dialogue

This dialogue displays information on the participant in question sorted across several tabs. The titles and contents of said tabs depend on whether the participant is external or a user. Users are displayed with the following tabs:

- The **General** tab contains fundamental information such as login and contact information.
- The **Private** tab contains address and SSN.
- The **Other** tab contains information on any email domains owned by the user, and the user's setup as a participant in F2.

External participants are displayed with the following tabs:

- The **General** tab contains fundamental contact information such as phone number and address.
- The **Identification** tab contains information from external registries such as CPR.
- The **Other** tab describes how the participant is set up in F2 and contains additional contact information including website.

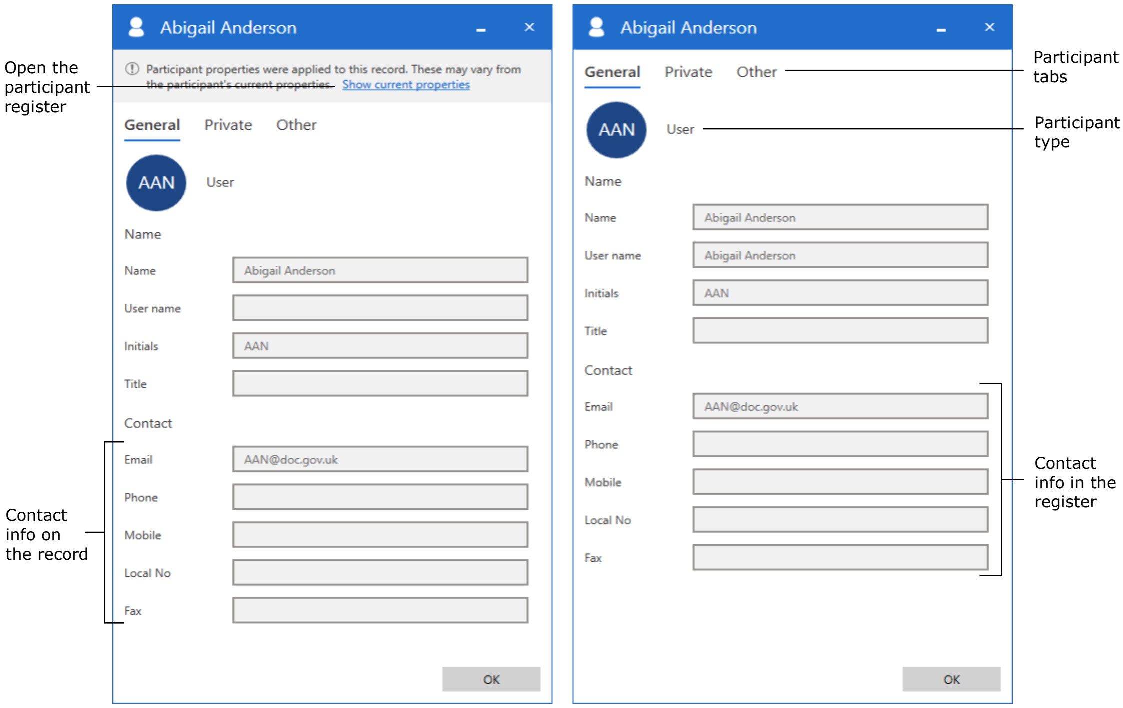


Figure 16: Properties for the user [participant] (Record edition)

When the participant dialogue is accessed from a record, F2 displays a message at the top of the dialogue to inform the user that the participant may have been updated later. The message also links to the participant in the register.

For further information on participant properties, see *F2 Desktop – Administrator*.

The information displayed in this dialogue is configurable. Configurations are made in cooperation with cBrain.

Note: cBrain recommends regular maintenance of the participant register to ensure up-to-date information.

Create participants from emails in F2's participant register

F2 automatically checks whether an external participant already exists in the participant register based on the fields "Name" and "Email".

If F2 detects a participant on an email record that cannot be found in the register, it may be added in one of the following ways.

- When a record containing unknown participants in the delivery fields is set in edit mode, F2 prompts the user to add them to the participant register if the related setting is enabled in the user's personal settings.
- Create the participant from the "To", "Cc" or "Xbc" fields directly by right-clicking on the unknown participant's email address, or by clicking on the "Create participants" link which appears when these fields contain unknown email addresses. If the email is sent from the user's personal archive, F2 suggests creating the participant in the private register.

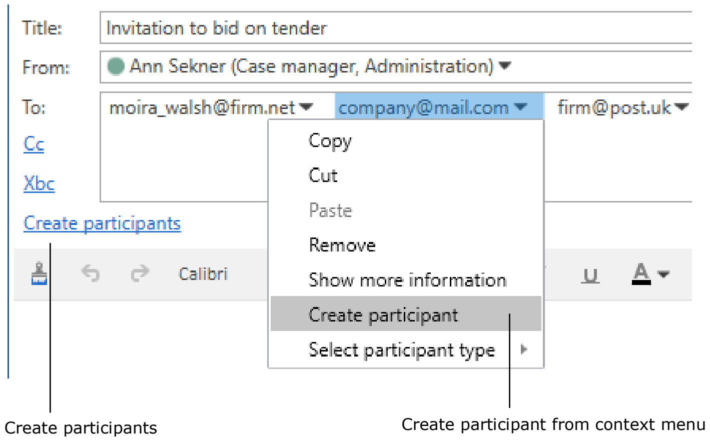


Figure 17: Create external participant in the participant register

Both actions open the "Create participants in the participant register" dialogue where the participants can be added. Read more about the dialogue in the section *The "Create participants in the participant register" dialogue* . General management of the created external participants is described in the *F2 Desktop – Administrator* manual.

The "Create participants in the participant register" dialogue

Saving an unknown participant to F2's participant register is done via the "Create participants in the participant register" dialogue.

From here it is possible to create a new participant or replace an unknown participant with an existing one. This is done by clicking either **Create participants** or **Replace selected**. Through this dialogue, the location of the participant is also selected.

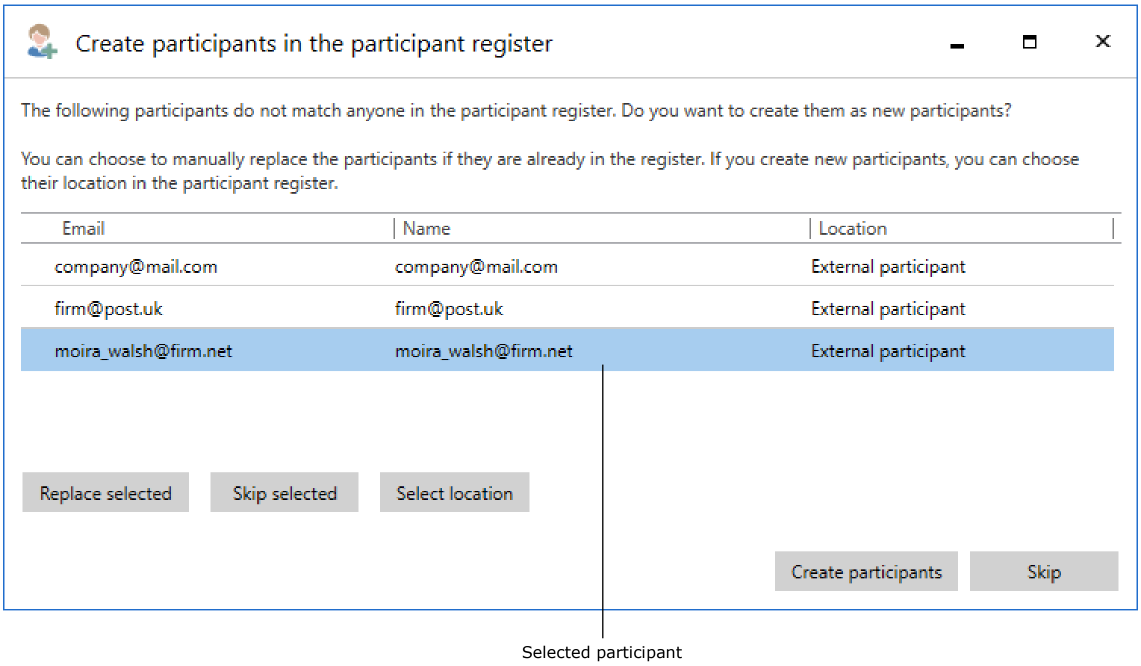


Figure 18: Create participants in the participant register

Select one or more participants in the dialogue to create, replace, or skip. The participants are removed from the dialogue once a decision has been made.

To replace an existing participant with one of the unknown ones, click **Replace selected**. The "Choose participant" dialogue opens, from which the relevant existing participant can be found.

If necessary, click **Select location** first to select which node to create the new participants in rather than the one suggested in the "Location" column.

Click **Create participants** in the bottom right to create the highlighted participants as new participants in the participant register.

To skip the highlighted participants, click **Skip selected**. It is also possible to dismiss the entire dialogue by clicking **Skip** in the bottom right. The participants will be present in the dialogue the next time it opens as long as they are unknown.

> **Note**: F2 can be configured to allow multiple participants with the same email address. In this case, the "Create participants in the participant register" dialogue will display a warning for each participant with a duplicate email address. F2 is configured in cooperation with cBrain.

Placement of new participants

Click **Select location** in the "Create participants in the participant register" dialogue. The "Choose participant" dialogue opens. Here, select a location for the participant by double-clicking on a node or by selecting a node and then clicking **OK**.

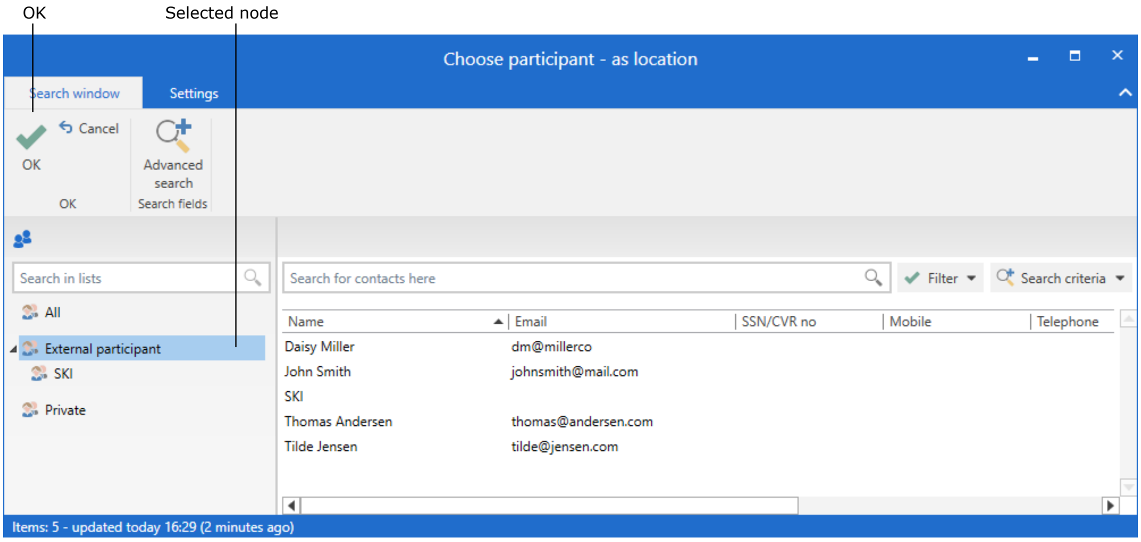


Figure 19: Set participant location

The default location for new participants is the "External participants" group. Placing a participant here requires the "Editor of participants" privilege. Without this privilege a participant can only be created in the "Private" node. This default node can be changed during the installation of F2. For further information about privileges, see the *F2 Desktop – Administrator* manual.

Format selector for emails

Before sending an email, it is possible to select the file format for any attached documents. If the delivery metadata fields are shown, the user will be able to change formats in the document area. Here it is possible to keep the original file format or convert the files into PDFs.

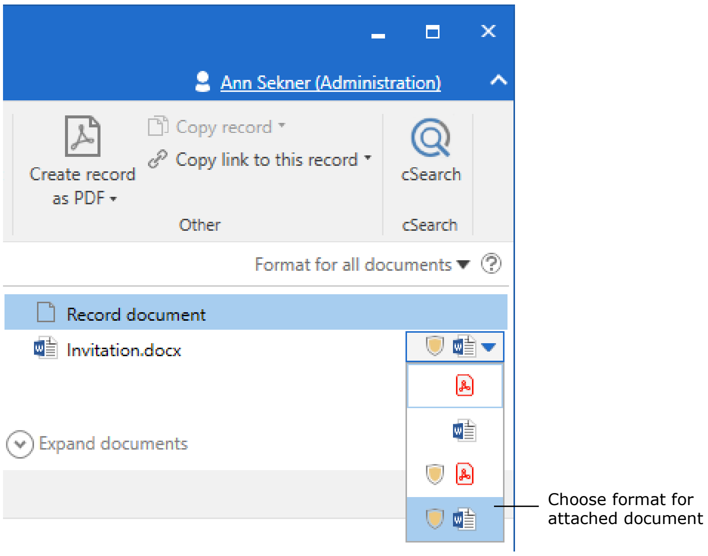


Figure 20: Format selector

Note: The format selector has no effect on emails sent internally in F2. It only affects emails sent to external participants who will receive attachments in the format selected by the sender.

If there are several documents attached to the record, it is possible to mass-select the format.

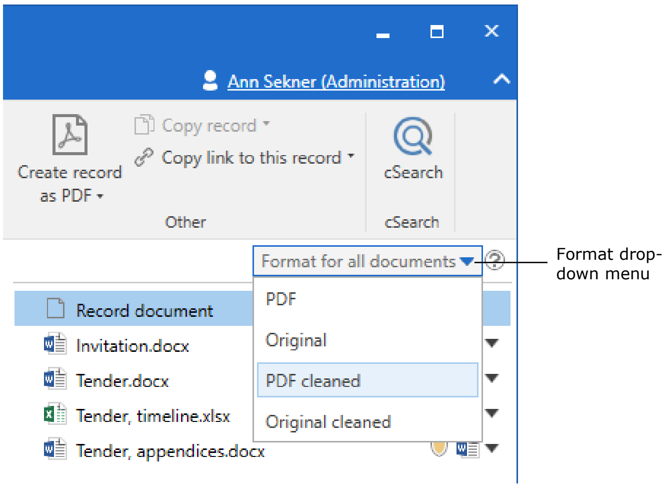


Figure 21: Selecting the same format for all documents

Email details

The record window for an email record shows when it has been sent or received and whether it has been exchanged internally in F2 or externally. Any issues during the sending of the email are also registered. These details are shown directly below the record ribbon.

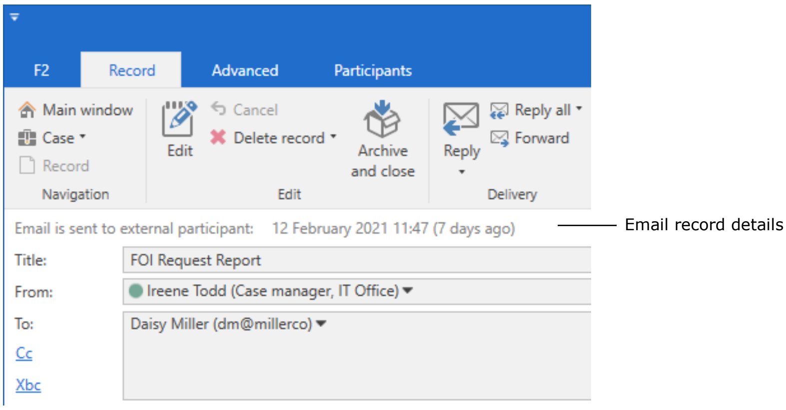


Figure 22: Email record details

Receiving external emails

When an email is received in F2, its text and any attachments will be locked so they cannot be edited.

However, it is possible to edit certain metadata for an incoming email, if the user has full write access to the record:

- “Title” may be edited.
- “From” (sender), “To” (recipients) and “Cc” (recipients) may be edited.

Changes to the record’s metadata can be seen via the “Advanced” tab of the record window. From here, click the **History** menu item and then the **Show metadata** view as shown below.

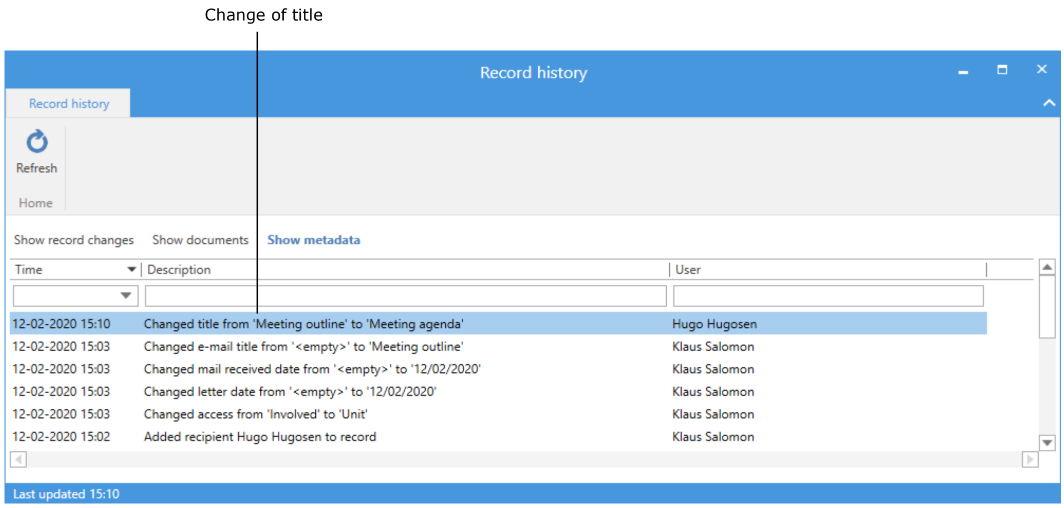


Figure 23: History of the record metadata

> **Note**: It is possible to search for both the record’s current as well as its original title via the “Record title” and “Record/case title” search fields. The search result always displays the email record’s current title. For further information on searches, see *F2 Desktop – Searches*.

Automatic case linking when external participants reply to emails from F2

F2 can be configured to link replies from external users to the record to which they are replying. This can be configured during the installation of F2.

When the setting is enabled all email replies from the external address are automatically associated with the original email record. If the record to which the incoming email record is related has a case number, the incoming email record is automatically added to the case.

In the record window it is possible to see other records from the same email correspondence if the automatic relation is set up. An overview is available in the “Related records” dialogue on the “Advanced” tab.

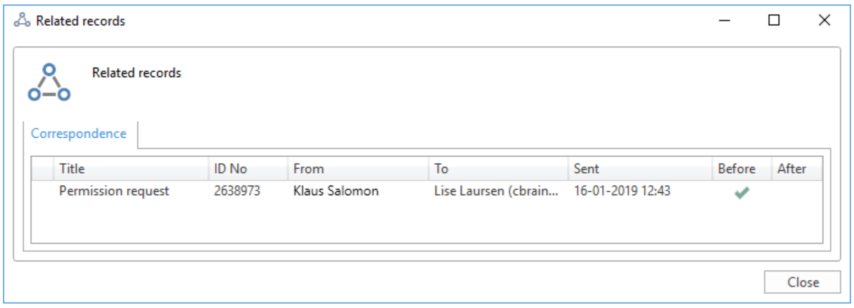


Figure 24: The "Related records" dialogue

Additionally, it is possible through a setting to automatically add the record ID or case number in the "Title" field to all outbound emails from the authority. This setting is described in *F2 Desktop – Administrator*.

Access levels and emails

Access level for external emails imported into F2

If F2 is configured to import emails from a mail server, records are automatically assigned an access level when created in F2. This is a critical issue to consider for the F2 organisation.

For many organisations it is an advantage that emails which are NOT private can be viewed and processed by various employees, and that these emails are available to the organisation e.g. when employees are ill or leave their position.

By default, F2 is configured to respect employee privacy. This means that F2 automatically assigns the "Involved" access level to imported emails, so only the recipient will be able to view the email unless the access level is changed.

It is also possible to assign the access level "Unit" to imported emails. This configuration is done in cooperation with cBrain.

The access level for imported emails can be viewed and configured from on "Settings" tab in the "Setup" dialogue.

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

Access level for replying and forwarding

Records that are replied to or forwarded are automatically given the access level corresponding to that of a newly created record. As with new records, the user also has the option of using case help.

Note: The access level for new records depends on the organisation's configuration.

Note: In cooperation with cBrain, F2 can be configured to copy the access level of the original record when it is replied to or forwarded.

Case help for emails requiring formal processing

F2 can be configured to expand the access level for formal emails while restricting the access level of users' private emails. This is done with case help.

If an imported email requires formal processing, the recipient ticks the "Case help" box in the record window.

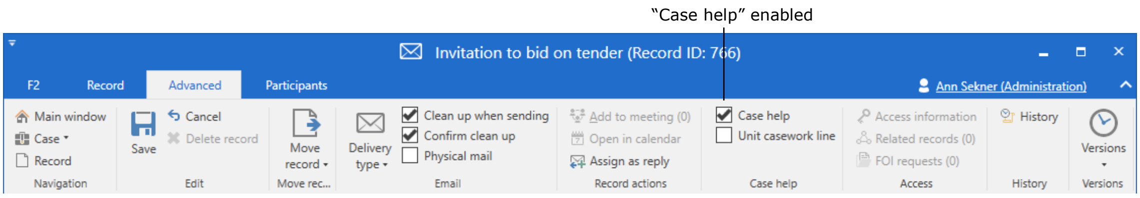


Figure 25: "Case help" on the "Advanced" tab

For more information on this, see the *Case help* section.

Chat

Chat is used for informal coordination and communication related to work tasks or knowledge sharing.

The chat function in F2 is particularly effective because the chat is always related to a specific record. The subject of the chat, i.e. the record, is automatically shared, which allows for easy orientation for the chat recipients.

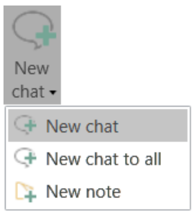


Figure 26: The main window's "New chat" menu item

A new chat can be added to a record, including an email record, via the main and record window ribbons.

When a record is open, any new chat that is created is automatically linked to this record. Chatting always takes place in the context of a specific record.

Users can access all records from which they have chatted via the main window search list, "My chatted records". Read more about this list and its contents in *F2 Desktop – The Main Window*.

Note: A new chat is always linked to a record, because a chat must always be created via a record.

The chat function is used for chatting with other F2 users in the same authority about a particular record.

Chats have a number of advantages to sending internal emails, for example:

- A chat can only be seen by the users who are added as chat recipients.

- A chat can be deleted from a record.
- A chat makes it possible to edit a record without sending it.
- Several chats with several users can be created and opened on the record simultaneously.
- A chat can be used as a to-do list for the chat creator, since it is only visible to other users if they have been added. This way a user can have one or more to do lists on a record that are only visible to themself.

Only chat participants can see the contents of a chat, but via the "Participants" tab anyone with access to a given record is able to see which users are added as chat participants.

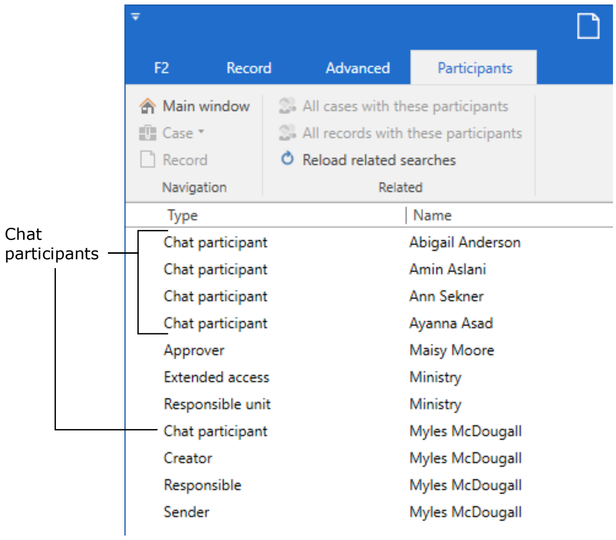


Figure 27: Chat participants shown on the "Participants" tab

Creating a new chat from the main window ribbon

A chat can be created directly from the main window. Select a record in the main window and click on **New chat.** A new chat is then created without the record being opened.

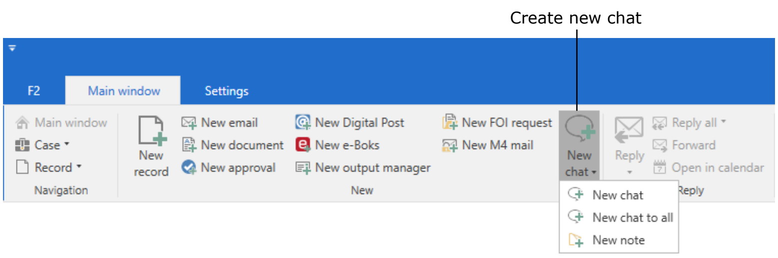


Figure 28: Add new chat from the main window ribbon

Creating a new chat from the record window ribbon

A chat can be created from the record window ribbon. Click on the menu item **New chat** to create a chat linked to the open record.

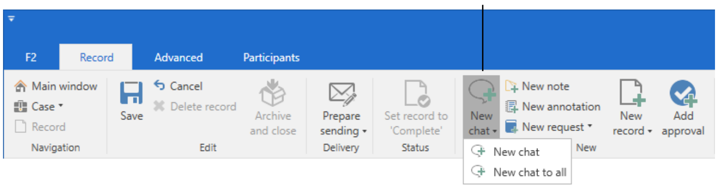


Figure 29: Add new chat from the record window ribbon

When a new chat is created, either from the main window or from the record window, the chat window opens.

The chat window

In the chat window it is possible to add participants to a conversation and exchange messages. If there is more than one chat on a record, a list of chats is shown at the left side of the window.

A new chat can also be created from the chat window by clicking **New chat**.

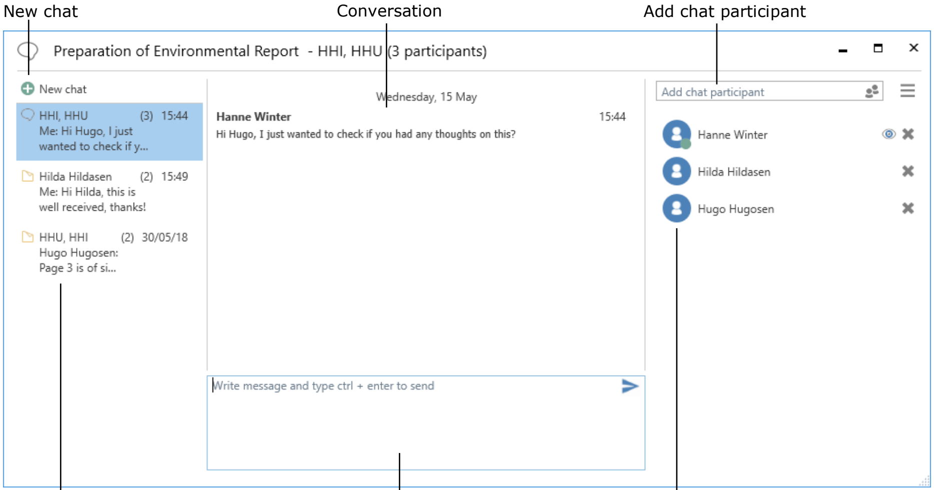


Figure 30: The chat window

Chat participants can be added via the "Add chat participant" field in three ways: by writing the name of a user, by clicking the participant icon in the right side of the field, or by pressing the **down arrow** key to select a predefined participant group.

As a name is entered in the "Add chat participant field", F2 suggests relevant F2 users in a drop-down menu.

Clicking the participant icon in the right side of the field opens the "Choose participant" dialogue. Locate the relevant user in F2's participant register, and double-click said user to add them to the chat and close the dialogue. Multiple chat participants can be added simultaneously by selecting the relevant users and clicking **Add participant(s)** in the dialogue ribbon. This way, multiple participants are added to the chat. When all relevant users have been selected, click **OK** to add the users as chat participants.

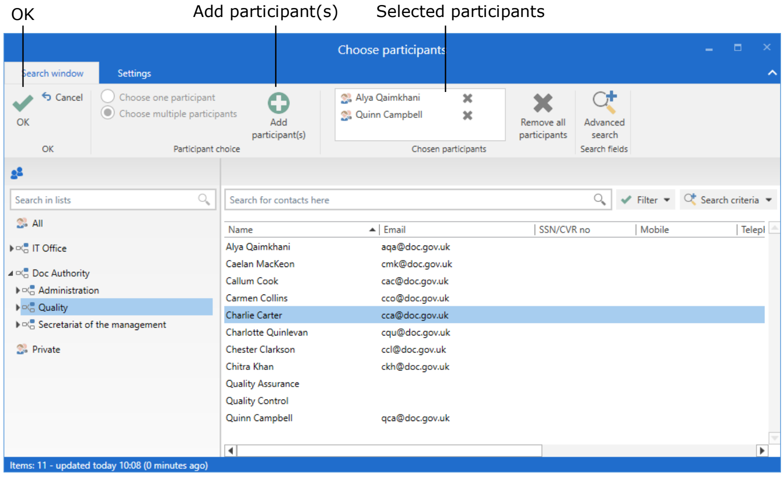


Figure 31: Add chat participants from the participant register

By pressing the **down arrow** key while focus is in the "Add chat participant" field, predefined participant groups become available. The groups are comprised of users who are involved on a record in the following ways:

- Senders and recipients corresponding to the **Chat to all** function. The function is described in *Chat to all*.
- Responsible user or unit and supplementary case managers.
- Approvers who have approved the record.
- The user's secretariat if one exists. The secretariat is defined as users with "On behalf of" rights that allow them to manage approvals for a user such as a minister.

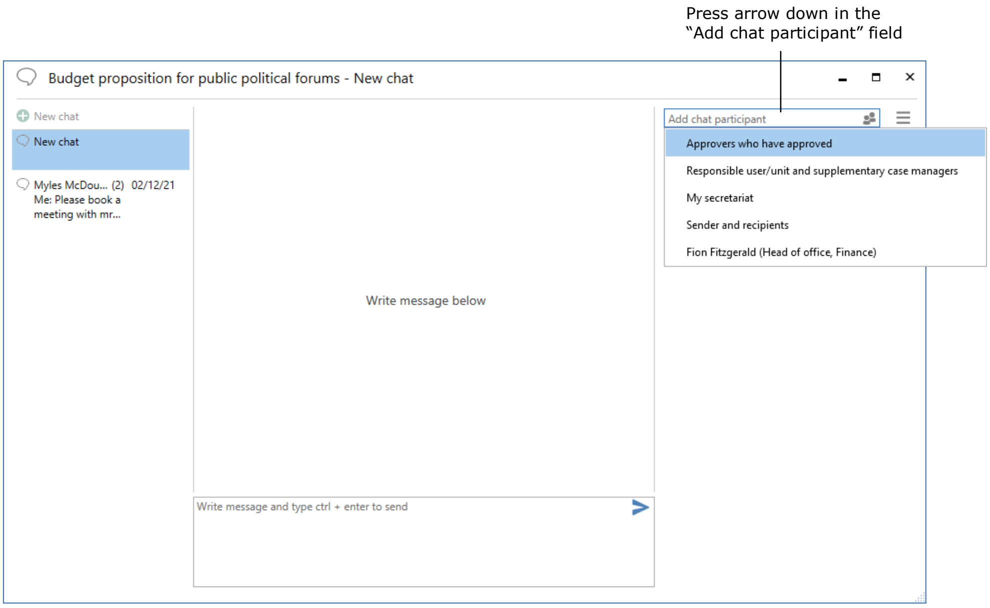


Figure 32: Add group in the "New chat" dialogue

Note: Suggestions in the “Add participants” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

When a chat participant is added, their name is shown in the participant list to the right in the chat window. Added participants can add additional users to the conversation. If a user profile has a picture, it is displayed in the chat participant list.

To write a message, click the compose box in the lower part of the window. Send the message by clicking the “send chat” icon or pressing **Ctrl+Enter**. Previous messages from all users are displayed above the compose box.

Figure 33: The "Send chat" icon

Note: File paths, URLs such as www.cbrain.com, and f2p links inserted in chat messages are converted to clickable links.

When a participant has read the latest message in the conversation, the “read” icon appears next to their name.

Figure 34: The "Read" icon

To remove a participant from the chat, click the “remove” icon next to their name. While only the creator of the chat can remove themself from the participant list, all other participants can remove themselves as well as any other participants.

Figure 35: The "Remove" icon

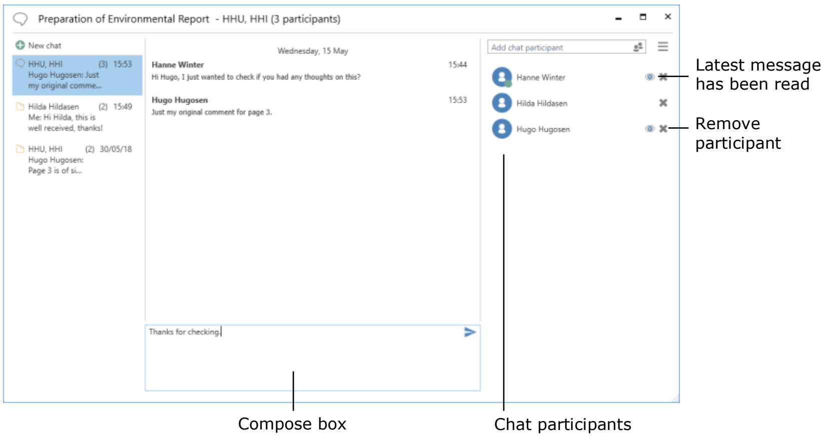


Figure 36: Conversation in the chat window

When a chat is sent to one or more participants, its record appears as unread in their inboxes in F2. For further information on receiving a chat, see the *Receiving a chat* section.

Close the chat window by clicking on the **X** in the top right corner or by using the shortcut key **Esc**.

Unsent chat messages are kept when the user cycles between chats or notes. If the user attempts to close the window while there are unsent messages, a warning dialogue appears.

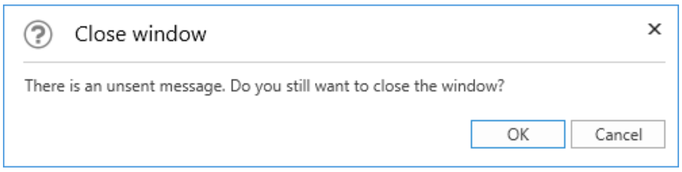


Figure 37: Unsent message warning

The chat window also remembers when the user adds participants to an unsaved chat.

A warning message is shown in chat window if the user is the only participant in a chat.

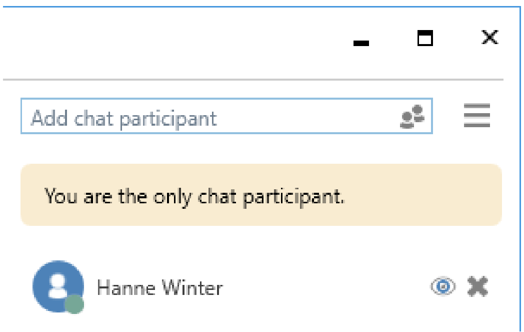


Figure 38: Chat window warning message

Chat overview

The left side of the chat window displays the list of chats and notes in which the user involved. Both the chat titles and their participants are displayed. The number of participants is shown in brackets.

An unnamed chat will use the initials of the participants as its title. The full names of the participants are displayed in a tooltip. If there are only two participants on a chat, the other user's name is used as the title.

The list of chat participants is sorted after the latest chat message, i.e. the latest user to enter a message is the first one listed.

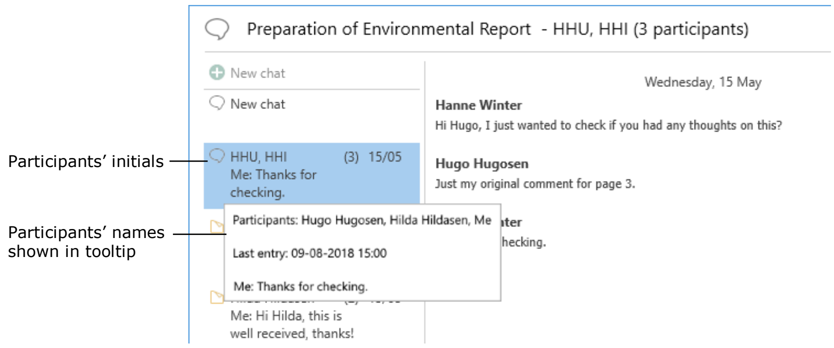


Figure 39: Participants' initials and full names in chat window

The functions of the chat window

The chat window's functions are found in the drop-down menu in its top right corner.

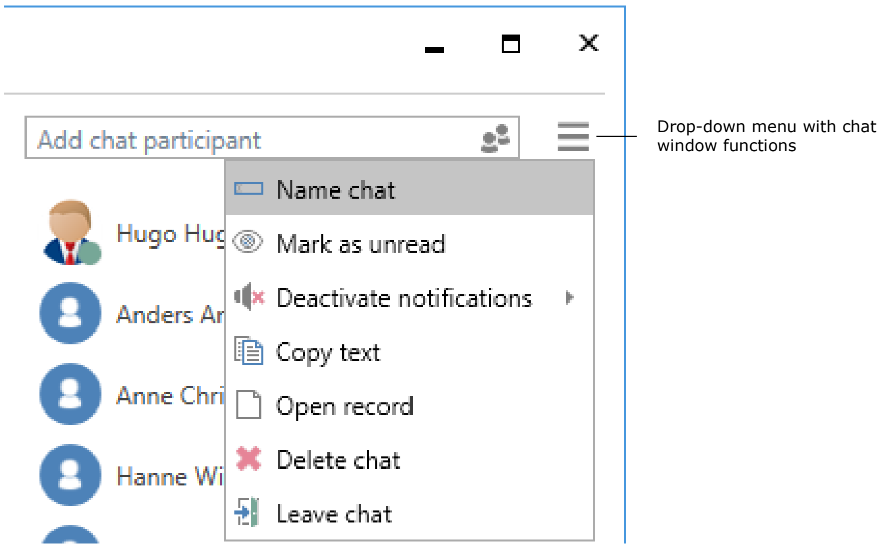


Figure 40: Chat window functions

The functions are described below.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Name chat”</td><td>Opens a dialogue that lets the user name the conversation.

This may be useful if there are several conversations on the record.

The chat title is shown in the format “[Record title] – [Chat title]”. If the chat has not been named, the participants’ names are displayed instead of a chat title. If there are more than two participants, only their initials are shown.</td></tr>
<tr><td>“Mark as unread”</td><td>Mark the latest message as unread. When the user selects this function, the chat window will close and the unread chats icon  appears on the record.</td></tr>
<tr><td>“Deactivate notifications”</td><td>Disables notifications for a given chat for one, eight or 24 hours, or until the user reactivates them.

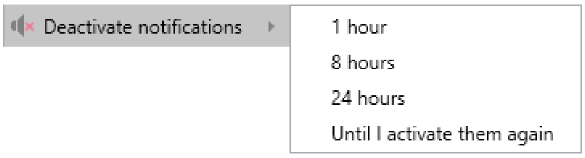


Figure 41: Options for deactivating notifications

Records with chats for which the user has deactivated notifications do <u>not</u> appear in the user’s inbox if a new message is added within the selected period of time.</td></tr>
<tr><td>“Copy text”</td><td>Copies the entire conversation.</td></tr>
<tr><td>“Open record”</td><td>Opens the record to which the chat is linked.</td></tr>
<tr><td>“Delete chat”</td><td>Deletes the chat. Can only be done by the creator. F2 asks for confirmation when a user deletes a chat.</td></tr>
<tr><td>“Leave chat”</td><td>Leave the chat.

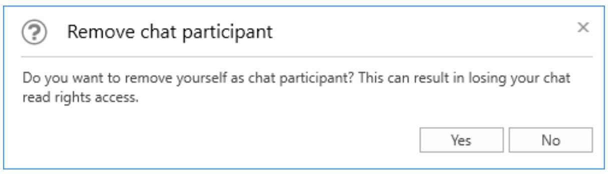


Figure 42: Leave chat

Note: Users who remove themselves from a chat that granted them access to an otherwise inaccessible record will no longer be able to access said record.</td></tr>
</table>

Receiving a chat

When a chat participant receives a message, the record to which the chat is linked appears in their inbox. The record title is shown in bold, and if the "Message icon" column is displayed in the result list, a chat icon with a blue circle is visible. This icon indicates a chat with an unread message. The blue circle disappears when all new chats have been opened and read. If the "Message icon" column is not displayed in the result list, it can be added. For further information, see the *F2 Desktop – Searches* manual.

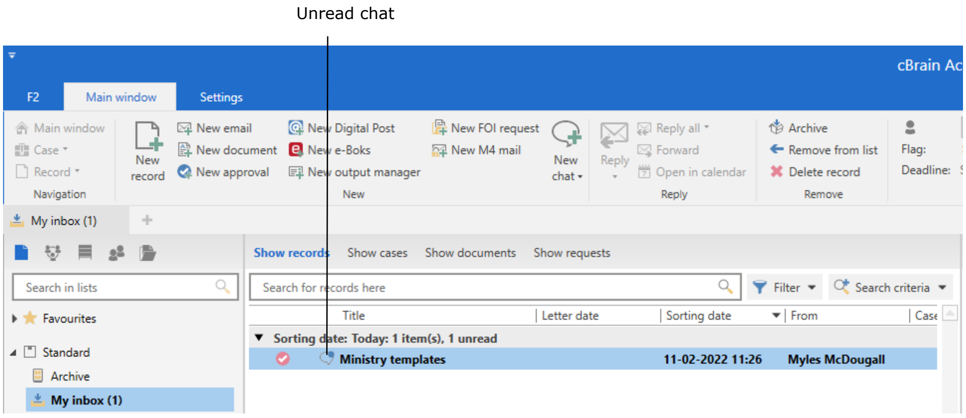


Figure 43: New chat in inbox

The chat message can be read by hovering the cursor over the chat icon as shown below.

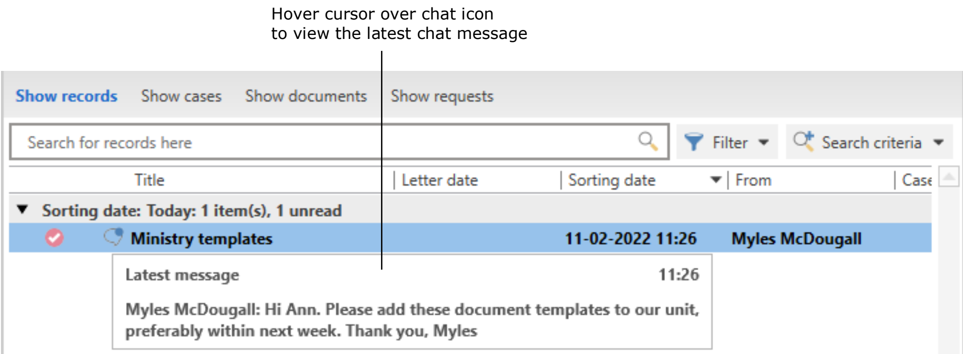


Figure 44: Tooltip showing chat message

A chat participant is able to see whether other chat participants are online, offline, or "Out of office". Hover the cursor over a chat participant who is "Out of office" to see their return date if they have entered any.

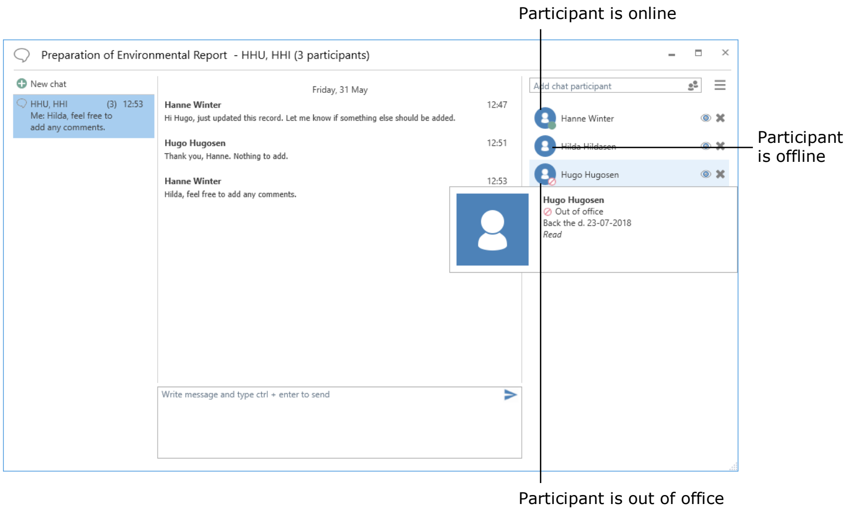


Figure 45: View chat participants' status

Regardless of the user's current unit, it is always possible to check all chats in which they are a participant. Switching job roles is not required to read chat messages addressed to the user.

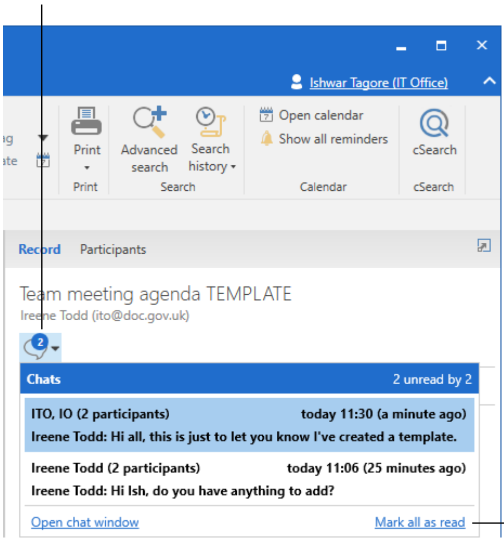
The read/unread indication is applied to the user across all of the units in which they have a job role.

If the main window preview is enabled, the chat icon is displayed above the record document. Click on the chat icon to view an excerpt of the chat content. If there are several chats on the same record, these are displayed below each other as shown in the example below.

> **Note**: The above also applies to the preview of notes, annotations and requests in the main, record and case windows.

The chat can be marked as read from the preview. The chat preview is also available in the record window.

Click on chat icon to see all chats on record



Mark as read

Figure 46: Preview of chats in the main window preview

In the record window chats are located above the document area near the upper right corner.

Chat icon

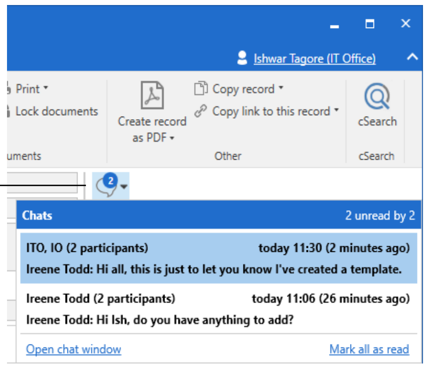


Figure 47: Chat preview in the record window

Hover the cursor over a chat to display a tooltip showing the entire content of the latest message. This is useful for particularly long messages. The tooltip is displayed for ten minutes.

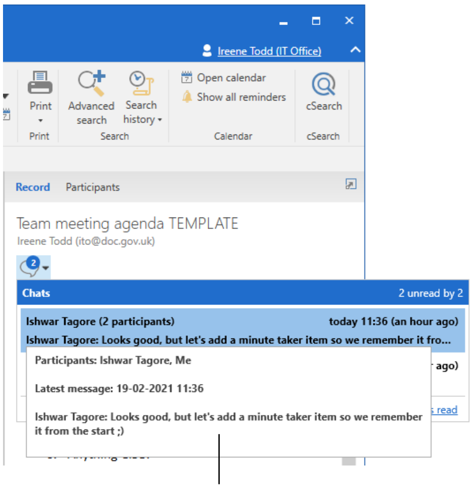


Figure 48: Chat tooltip in main window preview

> **Note**: A similar tooltip appears for notes, annotations and requests in the preview of the main, record and case windows.

The chat recipient's record access rights

When a record is shared through a chat, it is subject to the basic principles for user access rights to records. Unless the chat recipient already has a higher access right to the record, they are granted the access right one level lower than the chat creator.

This means that if a user with full write access to a record sends it to another user via a chat, the chat recipient receives write access to its documents. The access rights for chat recipients are listed in the following table.

Chat sender's access right	Chat recipient's access right
Full write access	Write access to documents
Write access to documents	Read access
Read access	Read access

> **Note**: A user's access right to a record will never be reduced via a chat.

Example 1: Henry in HR creates a record which is automatically assigned the access level "Involved". Henry sends a chat to his colleague, Hugo, on the record. Because Hugo becomes involved through a chat, his access right to this record is governed by the above table: Hugo gains write access to the record's documents.

Example 2: Now Henry expands the record's access level to "Unit", in this case HR. He adds his HR colleague, Hilda, as a chat recipient. If Hilda were only a chat recipient, she would have gained write access to the record's documents, but since Henry has changed the record's access level to "Unit", Hilda already has full write access to the record. In this case, Hilda's access right to the record is not affected by her being a chat recipient – only the highest level of access granted a user applies.

Example 3: Henry expands the access level again, this time to "All", before sending a chat to Ann in Administration. The new access level grants all users in the authority read access to the record. Ann, being a chat recipient, is also granted write access to its documents. Hilda and Hugo are unaffected by the new access level and retain full write access.

> **Note**: Access levels may change when a user is placed in a new unit or if a new user becomes responsible for the record.

Chat to all

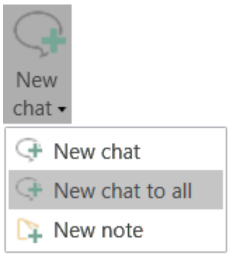


Figure 49: Create "New chat to all" in the main window

The "New chat to all" function can be used on email records to create a chat to all involved participants.

Instead of manually entering participants from the "From", "To", and "Xbc" fields in a new chat, click on **New chat to all.**

F2 then creates a chat in which all participants on the email record are added as chat recipients.

Click on **New chat to all** to add the following participants to the chat:

- Sender of the email record
- Recipient(s) of the email record
- Cc recipient(s) of the email record
- Xbc recipient(s) of the email record.

This function is available from both the main window and the record window ribbon.

> **Note**: Only internal F2 participants, and not external participants, are added to the chat.

Notes

As with the chat, a note is an informal way of communicating in F2. A considerable difference is that all users with read access to a record are also able to see its notes. In addition, a note cannot be deleted automatically, but remains on the record unless a user with the "Can delete notes" privilege deletes it.

Notes can be added to both records and cases without entering edit mode. Notes can also be added to records and cases that are completed. There is no limit to the number of notes that can be added to a record or case.

Participants can also be added to a note, but only on records. When a participant is added to a note, it appears with the record to which it is linked in the participant's inbox. Adding participants to a note may be useful e.g. when a user adds a telephone memo to an email record and wants to inform other users about this via their inboxes.

Note: Deleting notes requires the “Can delete notes” privilege.

Creating a note via the main window

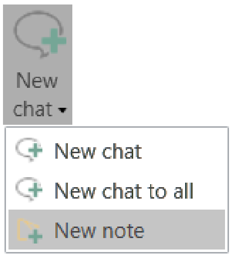


Figure 50: Create a new note in the main window

In the main window, click on **New note.** The menu item **New note** is found in the drop-down menu of **New chat**.

This opens the note window for the selected record, and the user can enter text and add recipients.

For further information on this window, see the section *The record’s note window*.

Creating a note via the record window

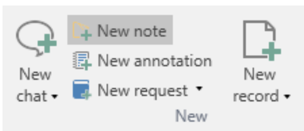


Figure 51: Create a new note in the record window

In the record window ribbon, click on **New note** in the “New” menu group. This opens the note window, and the user can enter text and add recipients.

For further information on this window, see the section *The record’s note window*.

Creating a note via the case window

Figure 52: Create a new note in the case window

In the case window ribbon, click on **New note** in the case window ribbon. It is not possible to add participants to a note on a case.

For further information on this window, see *F2 Desktop - Cases*.

The record’s note window

Enter the note text in the compose box at the bottom of the window and click on the “send note” icon or use the keyboard shortcut **Ctrl+Enter** to send. The note text will then appear above the compose box as shown below.

Figure 53: The "Send note" icon

Recipients can be added to a record note. These are added the same way as chat recipients. See the section *The chat window*.

If a record has multiple notes or conversations, a list is shown to the left in the window.

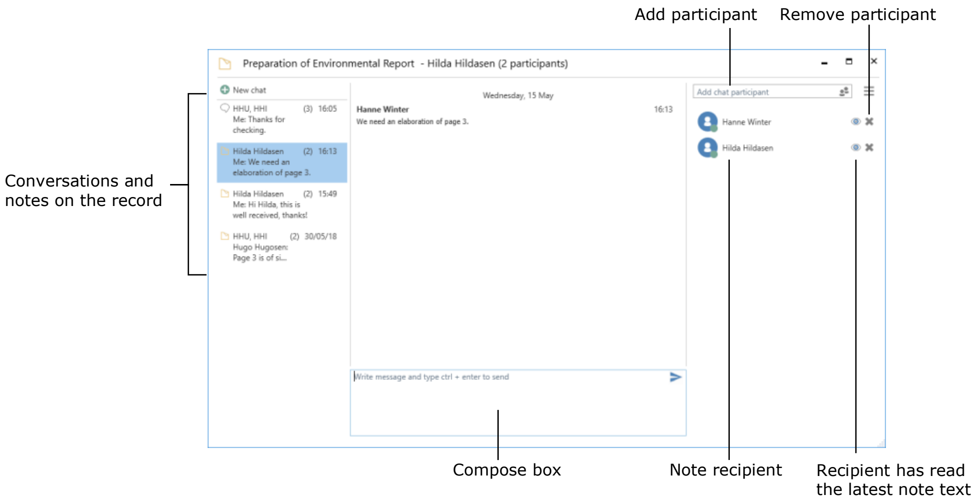


Figure 54: The record note window

When a note recipient is added, their name is shown in the participant list to the right-hand side of the window. Added participants can add additional users to the note. If a user has a profile picture, it is displayed in the note participant list.

When a participant has read the latest note text, the "read" icon appears next to their name.

Figure 55: The "Read" icon

To remove a participant from the note, click the "remove" icon next to their name. While only the creator of the note can remove themself from the participant list, all other participants can remove themselves as well as any other participants.

Figure 56: The "Remove" icon

When a note is sent to one or more participants, its record appears as unread in their inboxes in F2.

Note: A note can also be sent to participants that are offline. If a participant is not logged into F2, they will see the record with the note in their inbox when logging back in.

Close the note window by clicking the X in the top right corner or by using the shortcut key **Esc**.

The following sections present the functions of the note window. These differ in some ways from the note functions available on case notes. See *F2 Desktop – Cases* for more details.

The functions of the note window

The note window's functions are found in the drop-down menu in the top right of the note window.

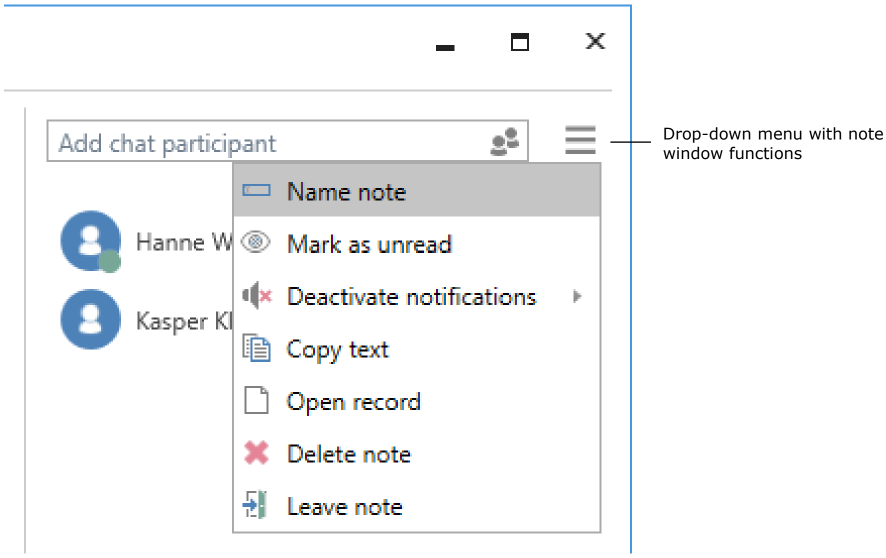
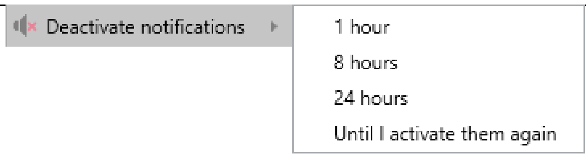
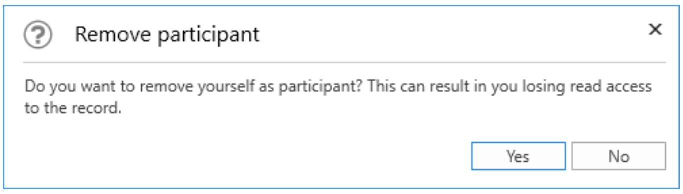


Figure 57: The record window's note functions

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 record. The chat title is shown in the format "[Record title] – [Note title]". If the note has not been named, the participants' names are displayed instead of a note title. If there are more than two note participants, only their initials are shown.
"Mark as unread"	Mark the latest note message as unread. When the user selects this function, the note window will close and the unread notes icon appears on the record.
"Deactivate notifications"	Disables notifications for a given note for one, eight or 24 hours, or until the user reactivates them.

Function	Description
	 **Figure 58: Deactivate notifications** Records with notes for which the user has deactivated notifications do <u>not</u> appear in the user's inbox if a new message is added within the selected period of time.
"Copy text"	Copies the entire note text.
"Open record"	Opens the record 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.
"Leave note"	Leave the note.  **Figure 59: Leave note** **Note**: Users who remove themselves from a note that granted them access to an otherwise inaccessible record will no longer be able to access said record.

As with a chat, note participants receive access rights depending on certain conditions. See the access levels in the section *The chat recipient's record access rights*.

Receiving a note

A note recipient will see the record to which the note is linked in their inbox. The  icon appears next to the record. The note may be read from the main window by hovering the cursor over the icon as shown below.

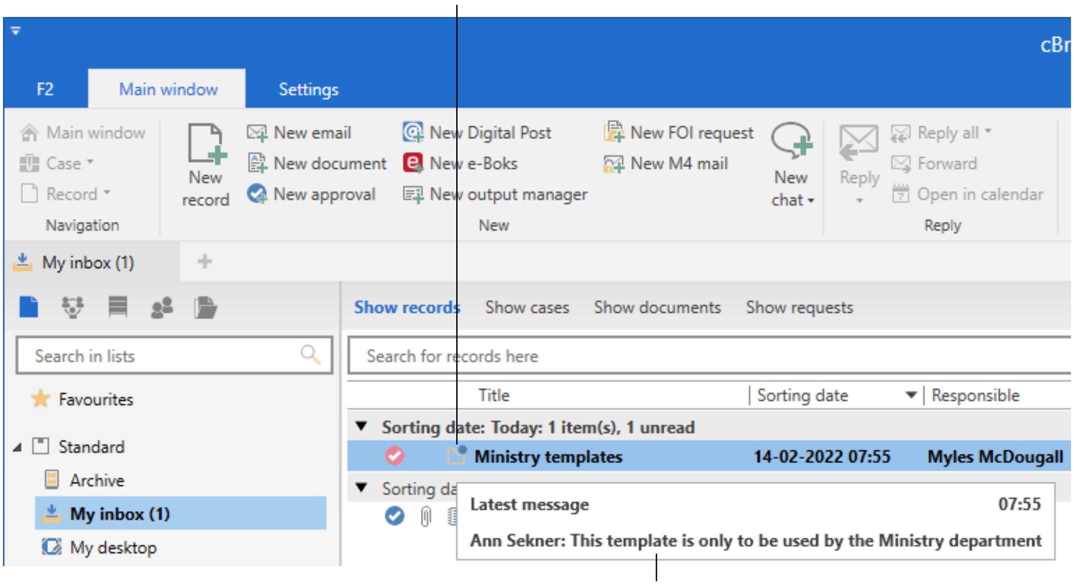


Figure 60: Unread note in the inbox

Double-clicking the icon opens the note directly.

Notes can also be opened from the main window preview as shown below.

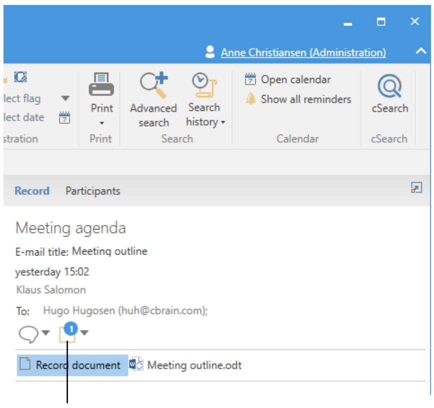


Figure 61: Open note from main window preview

In the record window the note is found above the document area to the right, as shown below. Click the icon to view the note text as a drop-down box. Click the note text to open the note window.

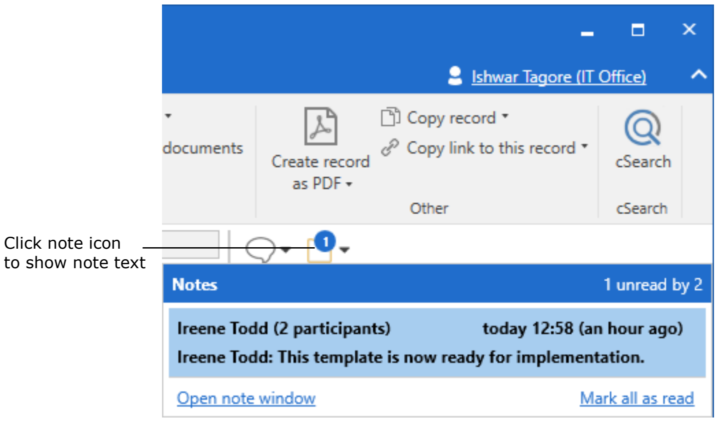


Figure 62: Note in record window

Allocation of responsibility

The allocation concept is a central feature of F2. It can be thought of as a digital version of an organisation's physical mail distribution in which incoming mail pertaining to formal cases are allocated to units or users without using the email function.

Organisations with a central postal unit scanning letters may have this unit allocate responsibility for letters to other units which in turn may allocate/distribute them to individual users. The selected unit or user will then have responsibility for the record.

The responsible participant

The allocation of responsibility typically means that the formal responsibility lies with a specific unit or user, the responsibility of the unit being derived from one of its users.

All records that are created in F2 or imported via an email system are born with an allocation of responsibility, either to the user or to the unit creating or receiving the record. The record manager can always allocate the responsibility of the record to another user or unit.

If responsibility for a record is reallocated, the record appears in the inbox of the newly appointed responsible user or unit.

Note: When a user allocates the responsibility for a record to him- or herself, the record does not appers i tje user's personal inbox. To add a record to the personal inbox, click the icon in the record ribbon. For further information, see *F2 Desktop – Management and Organisation*.

When the responsibility for a record is reallocated, the following happens:

- If a unit is inserted in the "Responsible" field, the record will appear in the unit's inbox and no longer appear in the user's "In process: Me" list.
- If a new user is inserted in the "Responsible" field, the record will appear in their inbox. F2 automatically adds the "Responsible unit" based on the user's affiliation.

This lets records whose responsibility rests with specific users appear in the "In process: Unit" list and makes it possible for users to sort F2's result list using the "Responsible unit" column.

Reallocating responsibility

In order to reallocate the responsibility for a record, it must be in edit mode. Enter a new user or unit in the "Responsible" field and click **Save**.

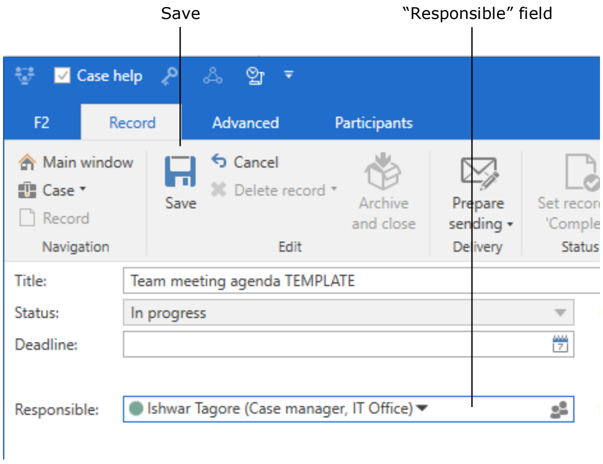


Figure 63: Reallocating responsibility

When the record is in edit mode, the participant icon appears in the "Responsible" field. Clicking on the icon opens F2's participant register in which a user or unit may be found via the "Choose participant" dialogue. For further information on this dialogue, see the section *The "Choose participants" dialogue*.

> **Note**: Suggestions in the "To", "Cc", and "Xbc" fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

The record creator's access when reallocating responsibility

The record creator may lose write access when reallocating the responsibility. This happens when the responsibility for a record is reallocated to a user in another unit, for example. The new user receives full write access to the record, while the record creator retains read access only. As a consequence, reallocating the responsibility of a record to another unit or user cannot be undone as the reallocating user loses full write access to the record in the process.

However, if the user or unit in the "Responsible" field is removed, the full write access reverts back to the record creator. The "Participants" tab in the record window shows both the currently responsible user or unit as well as the record's creator.

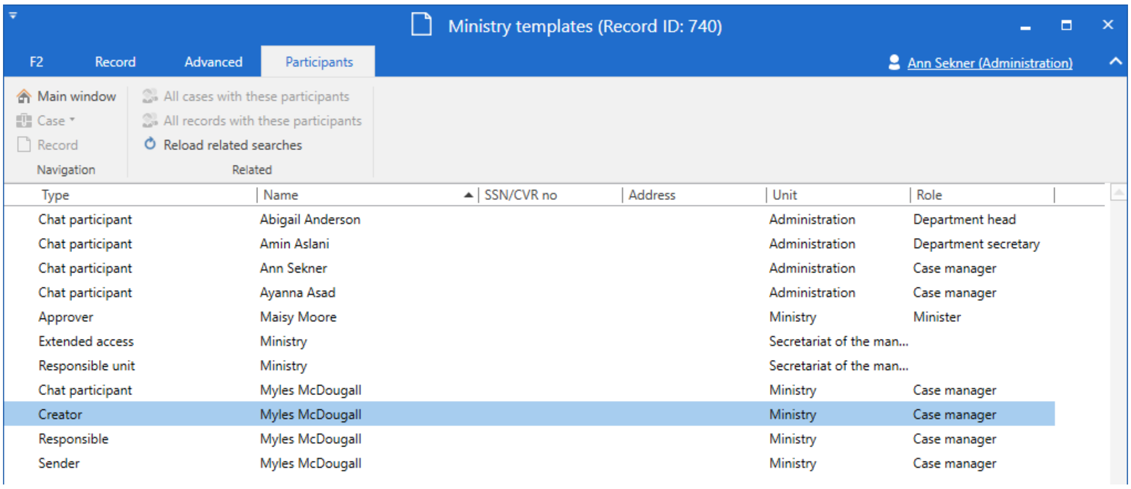


Figure 64: The "Participants" tab

Note: A user who is removed from a record's "Responsible" field will also lose read access if no other circumstances grants the user access. For records with the access level "Involved", this means that only the users/units currently involved in the record have read access to it.

Supplementary case manager

The "Supplementary case manager" field is used for appointing users, units, teams and/or distribution lists to assist with processing a record or case without being directly responsible. Any supplementary case managers remain unchanged when the responsibility for a record is reallocated.

Adding a supplementary case manager

In order to add a supplementary case manager, the record or case must be in edit mode. Add a user, unit, team and/or distribution list to the "Suppl. case mgr." field and click on **Save**.

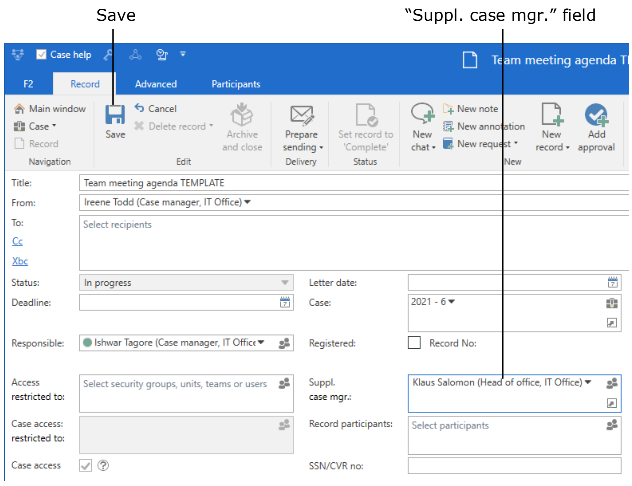


Figure 65: Add supplementary case manager to record

When a user or unit is added as a supplementary case manager to a record, it appears in the user's or unit's inbox.

Users will see the info icon next to the record, indicating that they have been added as a supplementary case manager.

Figure 66: The info icon

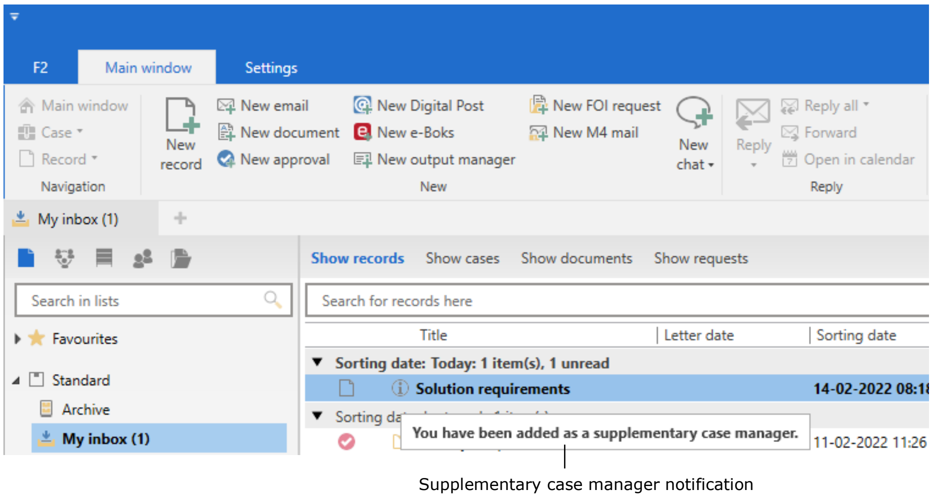


Figure 67: Supplementary case manager notification in inbox

Access rights for supplementary case managers

In the record window it is possible to add a user/unit/team/distribution list as a supplementary case manager.

The supplementary case manager's access rights are based on what is defined in the responsible user's F2 settings. By default, the access right for supplementary users and units is "Full write access". For further information on personal settings, see the *F2 Desktop – Settings and Setup* manual.

It is possible for the responsible user or unit to change the access rights to a record. Three levels exist:

- **Read access**: The supplementary case manager or unit has read-only access to the record.
- **Write access to documents**: The supplementary case manager or unit can edit the documents attached to the record (including the record document), but not its metadata.
- **Full write access**: The supplementary case manager or unit can edit the documents attached to the record (including the record document) as well as its metadata.

A supplementary case manager's access rights can be viewed and changed by right-clicking the participant. In the context menu, select "Access rights for the record". Here, the current access rights are shown and may be changed.

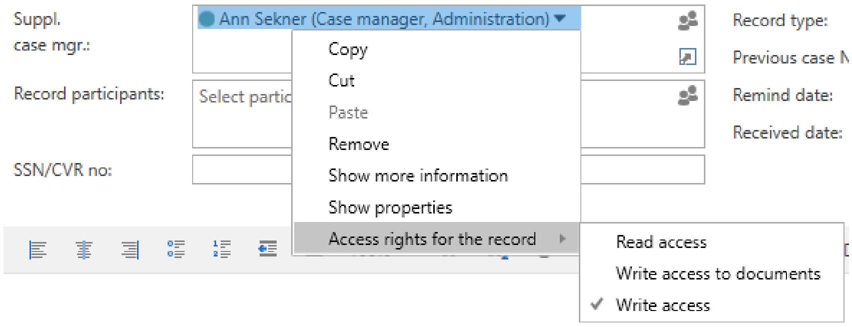


Figure 68: View access rights for supplementary case manager

> **Note**: A user who is removed from the "Suppl. case mgr." field on a record will also lose read access if no other circumstances grant the user access. For records with the access level "Involved", this means that only the users/units currently involved in the record have access to it.

Annotations

An annotation is a formal comment that is added to a record. This function is typically used if senior employees must annotate others' work or when an employee wishes to annotate a record with formal information.

On the record ribbon, click **New annotation** to open the dialogue below.

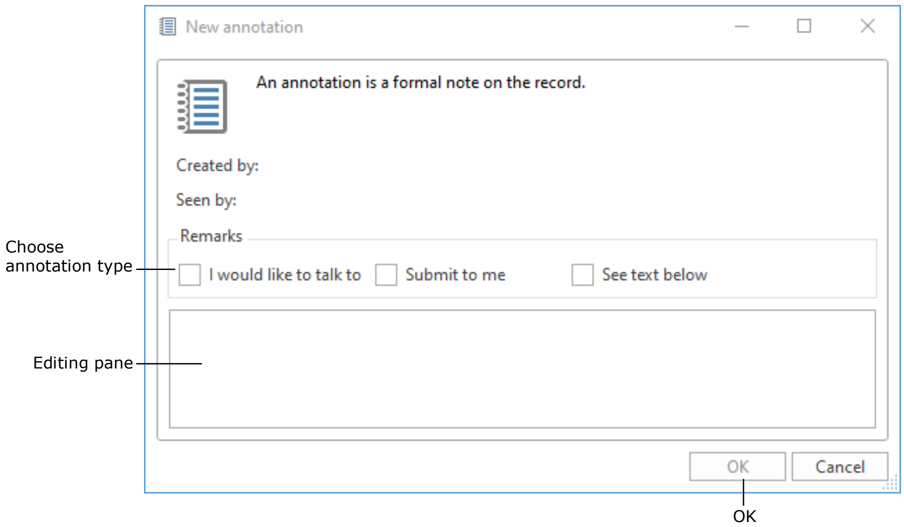


Figure 69: "New annotation" dialogue

Tick off one or more annotation types. If needed, add an annotation text in the editing pane to elaborate. The annotation type options can be configured and is maintained by a user with the "Value list administrator" privilege, so dialogue content may vary. Click **OK** to save the annotation.

The annotation icon is shown on the record above the document area. A blue circle is shown on the icon if the annotation is unread.

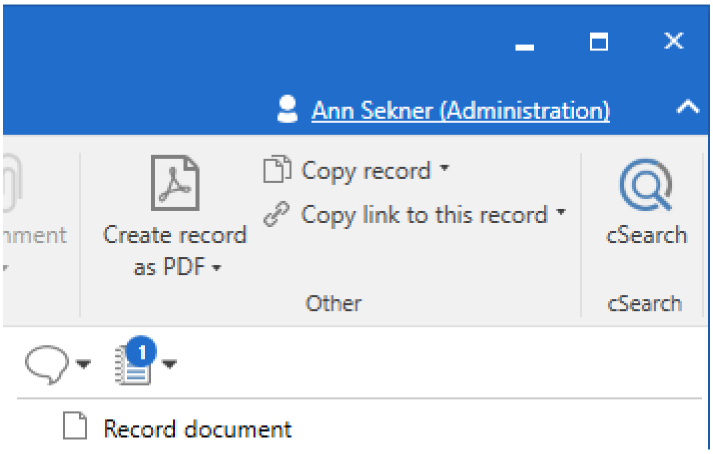


Figure 70: Annotation on the record

The annotation is visible to all users with access to the record. It is not possible to add users to annotation as with chats or notes.

The annotation is a type of formal communication and cannot be deleted from the record. If an organisation periodically delivers its documents to e.g. the National Archives, any annotations are included in the delivery.

Accessing an annotation

An annotation is accessed from either the record window or the main window. Click the annotation icon to view its text in a tooltip. Click the text to go to the annotation window.

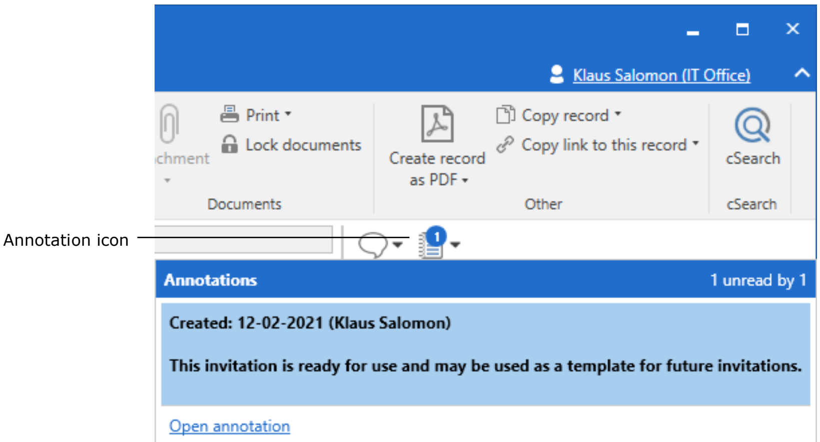


Figure 71: Access annotation

An annotation may be accessed from the main window without opening the record. Either double-click the annotation icon in the result list, or open the annotation from the main window preview.

The annotation text can be viewed in the result list via the annotation icon tooltip.

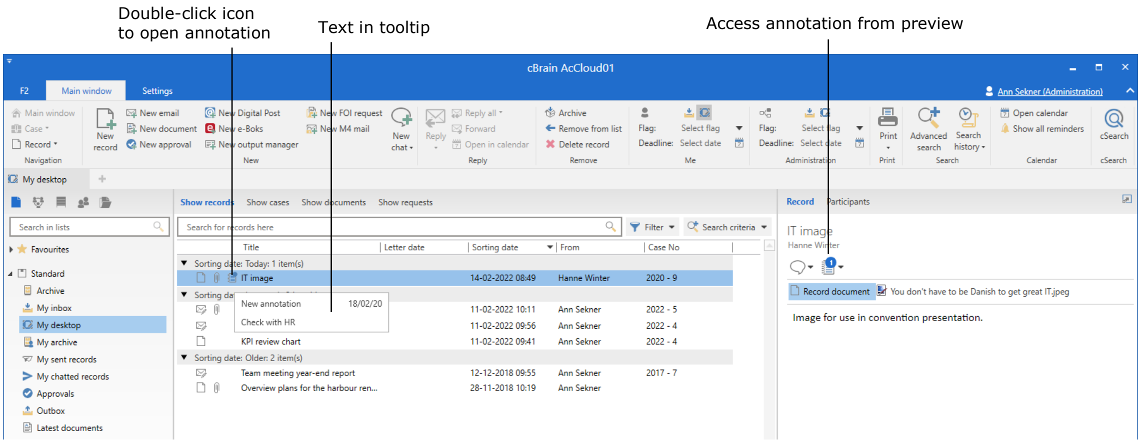


Figure 72: Access annotation from the main window

An annotation is marked as seen by opening the annotation window and clicking the **Seen** button.

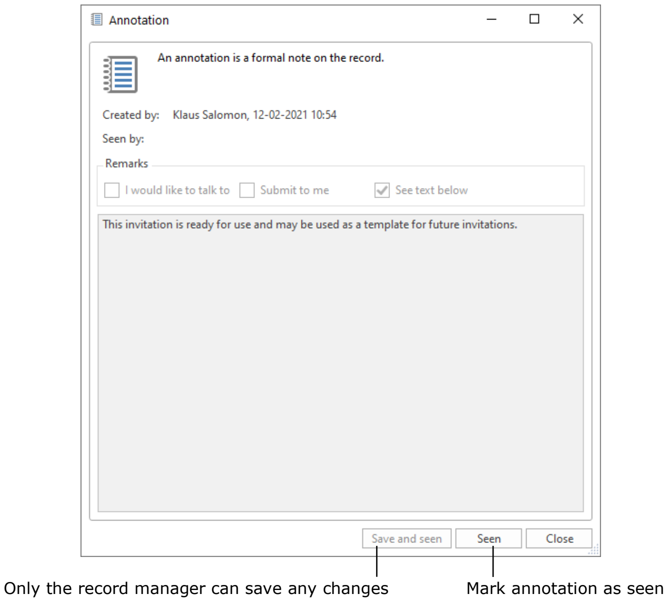


Figure 73: Mark an annotation as seen

When an annotation is marked as seen and then saved, it is automatically listed at the top of the annotation window.

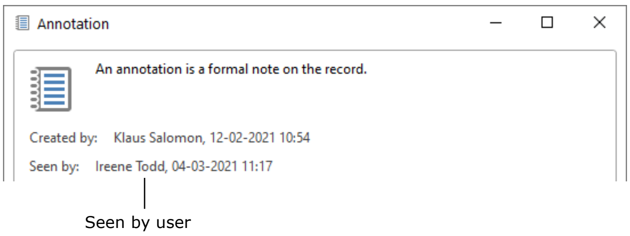


Figure 74: Annotation seen by user

Adding a record to a case

Adding a record to an existing case

A record in edit mode can be added to an open case by entering the case title or case number in the "Case" metadata field. When the user starts typing in the field, F2 starts searching for relevant cases.

Note: Suggestions in the "Case" field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

It is possible to search for a case by clicking the case icon in the "Case" metadata field. This opens the "Choose cases" dialogue from which the relevant case can be found. For further information on this dialogue, see the section *The "Choose cases" dialogue*.

Note: Through a configuration, it is possible to allow users to add records to closed cases. When enabled, the titles of closed cases are italicised. For more details on case configurations and closed cases, see *F2 Desktop – Cases*.

When a case has been added to the "Case" metadata field, click **Save** in the record window ribbon. The record is then added to the case.

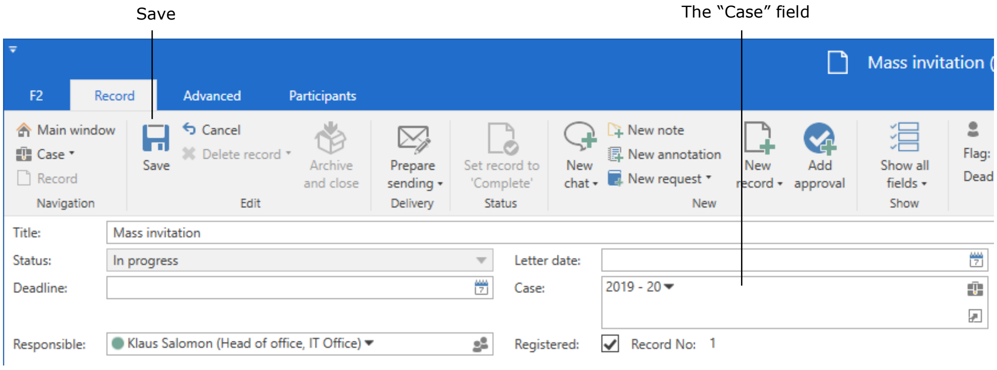


Figure 75: Add record to existing case

Adding a record to a new case

Creating a new case from the current record can be done in the following ways:

- Type "new" or "+" in the "Case" metadata field and press **Enter**. This opens the "New case" dialogue as shown below.
- Click the case icon in the "Case" field. The "Choose cases" dialogue opens. In this dialogue, click **New case**. For further information, see the section *The "Choose cases" dialogue*.

Both ways lead the user to the following dialogue:

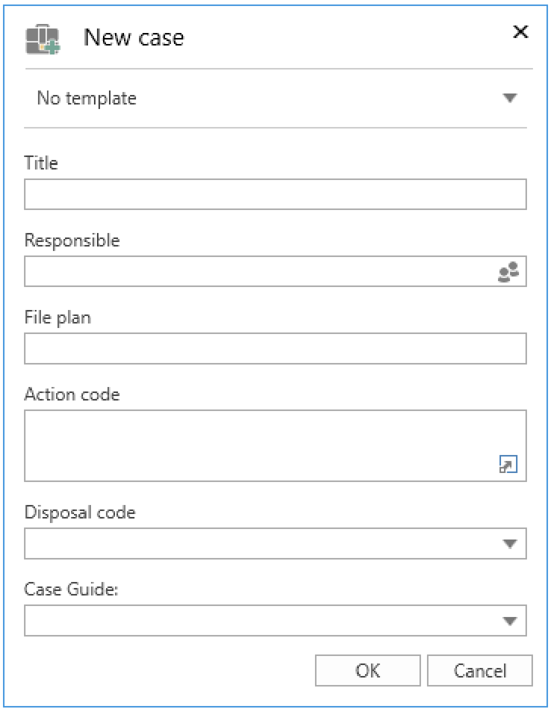


Figure 76: The "New case" dialogue

In the "New case" dialogue, the user enters the case title and other relevant metadata such as file plan, action code, disposal code or case guide (add-on). Depending on F2's configuration it may also be possible to choose a case template (add-on) that determines which metadata fields to fill in.

When the fields are filled in, click on **OK** to create the case. For further information on the case window and working with cases, see the *F2 Desktop – Cases* manual.

> **Note:** Depending on F2's configuration and the organisation's guide lines, some fields may be obligatory. Certain fields may also be filled in automatically.

The "Choose cases" dialogue

Click the case icon in the "Case" field on a record to open the "Choose cases" dialogue. This dialogue contains the same search options as F2's main window. These are used for adding one or more cases.

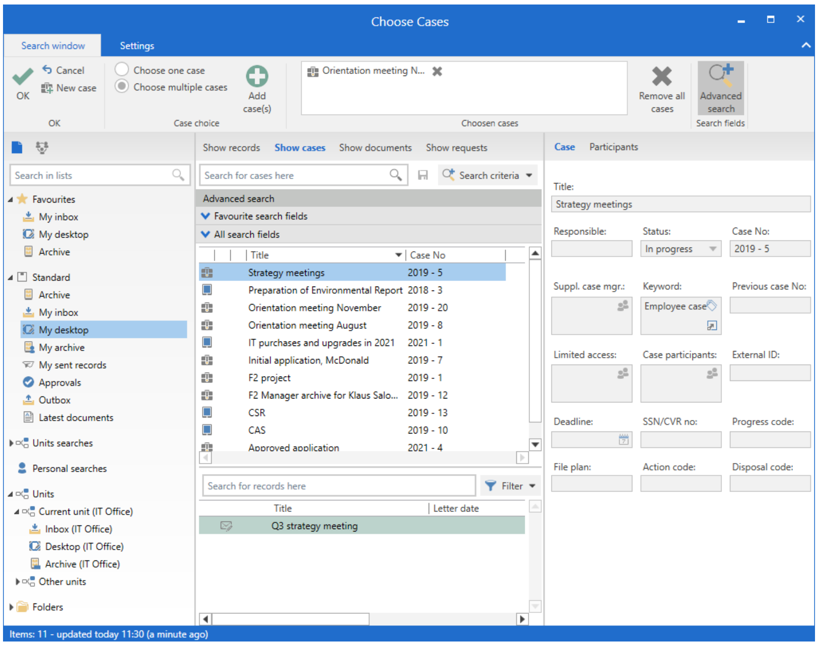
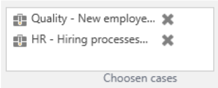
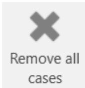


Figure 77: The "Choose cases" dialogue

The "Search window" tab in the dialogue ribbon offers the following options:

Function	Description
OK	Click on **OK** when one or more cases have been selected in the result list or are displayed in the "Chosen cases" field. The record is then added to the chosen case or copied to the chosen cases.
Cancel	Close the dialogue without adding the record to a case.
New case	Open the "New case" dialogue from which a new case can be created.
Choose one case Choose multiple cases	Click **Choose multiple cases** to display the "Chosen cases" field. When this field is visible, the function is inactive regardless of the number of cases shown in "Chosen cases". F2 automatically switches when the user selects one or more cases and clicks **Add case(s)**. If all cases are removed from the "Chosen cases" field, F2 automatically switches back to **Choose one case**. This makes it easier to see if the record is being added to one or several cases.
Add case(s)	Add the case(s) selected in the result list. The selected case(s) can be seen in the "Chosen cases" field in the dialogue ribbon shown in the "Chosen cases" field in the dialogue ribbon.

Function	Description
	The "Chosen cases" field shows cases the user has selected. **Note**: If a record is already added to a case, that case is shown in the when the dialogue is opened. To remove a case from the field, click the next to its title.
	Remove all cases from the "Chosen cases" field in the dialogue ribbon.
	Perform an advanced search using metadata fields. For further information, see the *F2 Desktop – Searches* manual.

In the "Choose cases" dialogue the user can search for the cases to which the record must be added.

If the record must be added to a single case, select the case and double-click to transfer it to the record's case field.

If the record must be copied to multiple cases, click **Choose multiple cases** in the dialogue ribbon. Then search for the relevant cases and add them to the "Chosen cases" field. Click on **OK** to add the cases to the record's case field.

If several cases have been selected, a copy of the record is added to the second case, the third case, etc. This is shown in the dialogue below which opens when the record is saved via the record window ribbon.

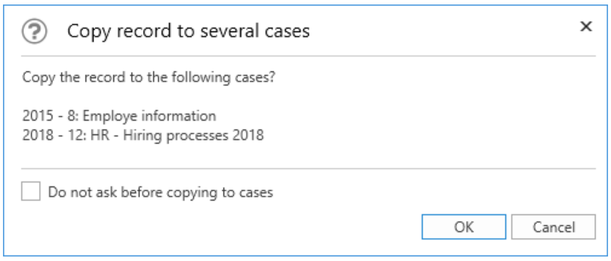


Figure 78: The "Copy record to several cases" dialogue

Click on **OK** in the dialogue to copy the record to the selected cases.

To skip this dialogue in the future, tick the box next to "Do not ask before copying to cases" before clicking on **OK**.

Note: A user may remove a record from a case and add it to another if they have full write access. A user may also remove a record from a case without adding it to a new case.

Records with copies on multiple cases

When a record has been copied to multiple cases, the user may view its copies in the record window. This is done by clicking on the cases icon next to the "Case" field.

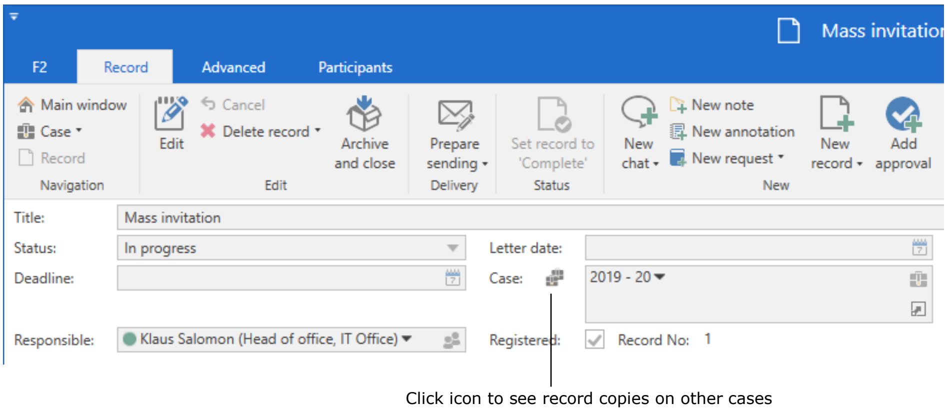


Figure 79: View record copies on other cases

The "Copy overview" dialogue will open, showing all cases to which the record has been added. The overview shows the following information:

- Case number
- Case title
- Record ID
- Record title
- Created (date)
- Created by (user).

The blue highlight shows the record that is currently open.

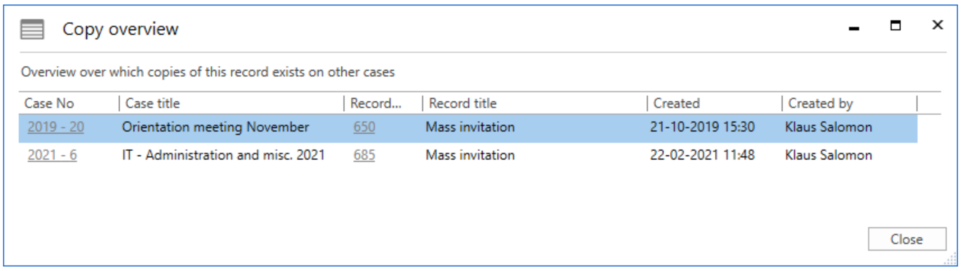


Figure 80: "Copy overview" dialogue

It is possible to access the case or record copy by clicking on either case number or record ID.

Standard behaviour when closing cases

When a case is closed by a user with the necessary rights (write access to all records on the case), the case records are affected in the following ways:

- All case records are completed.
- The metadata and documents on the record cannot be edited further. Practically, this means the **Edit** menu item is disabled, which also disables editing the record document and sending the record as an email.
- To reopen a record, its case must first be reopened. This requires the privilege "Closer cases".

F2's standard behaviour for closing cases is further described in *F2 Desktop – Cases*.

Record metadata

The visible record metadata fields depend on the user's personal settings. A record can be displayed with:

- Email metadata fields (i.e. metadata fields used when sending an email), see the *Email delivery metadata fields* section.
- Standard metadata fields, see the *Standard metadata fields* section.
- Advanced metadata fields, see the *Advanced metadata fields* section.

Adjust which metadata fields that are displayed by clicking **Show all fields** in the record window ribbon.

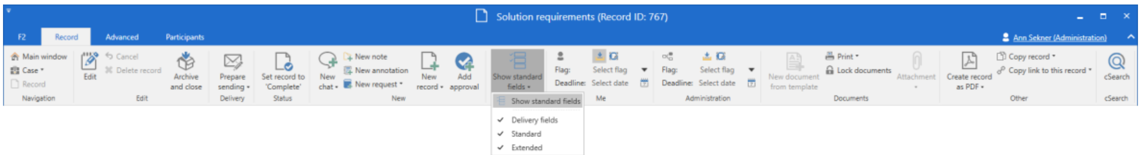


Figure 81: Show all record fields

Various metadata associated with a given record depend on its status and the user's rights.

The following sections describe the metadata fields and how certain record metadata are managed.

Email delivery metadata fields

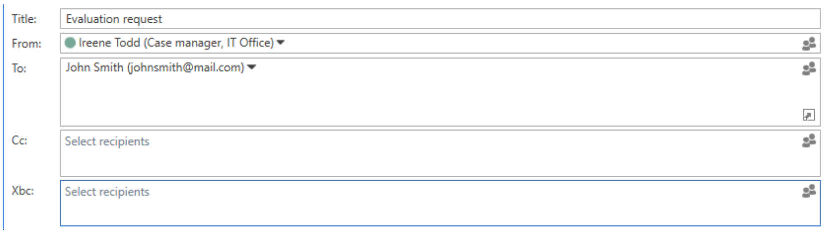


Figure 82: Email delivery fields

The email delivery metadata fields are described below. For further information on creating and sending email records, see the *Email* section.

Field	Description
"Title"	The "Title" field is always shown. It is a text field describing the record. The user must enter a title when creating the record. The title may be changed later. On an email record the title is identical to an email's subject field.
"From"	The sender of the email. This field is filled in automatically when the user starts typing in the "To" or "Cc" field.

Field	Description
"To"	Enter any recipients of the email record here.
"Cc"	Enter any Cc recipients of the email record here.
"Xbc"	Enter any Xbc recipients of the email record here. Adding an external participant here is similar to adding a recipient in Bcc in traditional email systems. **Note**: There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

Note: Suggestions in the "To", "Cc", and "Xbc" fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

Standard metadata fields

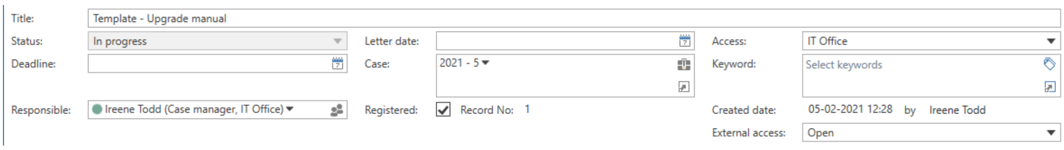
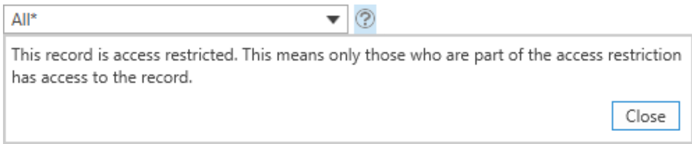


Figure 83: Standard metadata fields

The metadata fields shown on a record in non-expanded mode are reviewed below.

Field	Description
"Title"	"Title" is shown in every metadata field view. It is a free text field describing the record. A title is entered when the record is created. It may be changed later.
"Status"	The status of a record indicates whether it is "In progress" or "Completed".
"Deadline"	In this field a deadline is set on the record. This value is used e.g. in searches and for sorting lists.
"Responsible"	The "Responsible" field specifies the user or unit formally responsible for the record.
"Letter date"	If the record has been sent or received, it has a letter date. This is the date on which the record was sent or received in F2. In case of a scanned physical letter, the user can add a letter date in this field, which should correspond to the date on the physical letter.

Field	Description
"Case"	If there is a case number in this field, the record has been added to a case. If the field is empty, it can be added to a case from here. If a record is already added to a case, it may be moved to another by replacing the case number. The user may also remove the record from a case if they have the required rights. In order to remove a record from a case, delete the case number from the "Case" field. Adding the record to a new case is not required. If a record must be added to a known case, enter the case number or case title in this field. Then select the case and press **Enter** or double-click. For further information, see the section Adding a record to a case. A case contains its own set of metadata. For further information on cases, see the *F2 Desktop – Cases* manual. **Note**: Suggestions in the "Case" field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
"Registered"	In some public organisations, a tick in the "Registered" field means that the record will be included in deliveries to the National Archives or similar institutions. Private organisations may use this field to indicate particularly important records that may not be deleted. In addition this field, like any other record metadata, is used for miscellaneous searches, groupings, etc.
"Record no."	When a record is registered, a record number is allocated consecutively within a case. This means that only registered records added to a case have a record number.
"Access"	Here the user selects the access level for the record: • Involved • Unit • All. If a record is subject to an access restriction in the "Access restricted to" or "Case access restricted to" fields, an asterisk "*" is shown in the "Access" field. Hover the mouse over the ? icon for further information about access to the record. The example below shows the

Field	Description
	information displayed on a record with the access level “Unit” and an access restriction added.  **Figure 84: Access restriction information** For further information on access levels for records, see the *Record access* section. **Note**: Records can be edited by users from the responsible unit or by users involved in the record such as supplementary case managers.
“Keyword”	Here the user can add predefined keywords to the record. Keywords can be added in three different ways: • Start typing in the field, and F2 will search for matching keywords. If there are any keywords specific to the unit, only these will be shown. • Press the **down arrow** key to display a list of available keywords. If there are any keywords specific to the unit, only these will be shown. Press **Enter** or double-click to select a keyword. • Search all keywords. Click the icon in the “Keyword” field to open a dialogue showing all keywords available to the authority. From here, select a keyword and add it to the right panel with the right arrow button. Click **OK** to close the dialogue and add the selected keywords.
“Created date”	This field shows the date when the record was created and by whom. **Note**: For incoming emails, the “Created date” denotes when the record was imported into F2.
“External access” (add-on)	This field is only used for marking the record in connection with customer-specific integrations. The values are taken from a value list and must be configured in cooperation with cBrain.

Advanced metadata fields

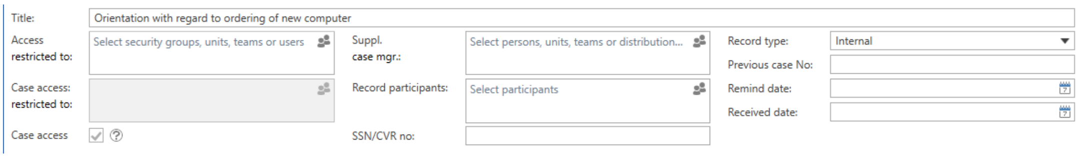
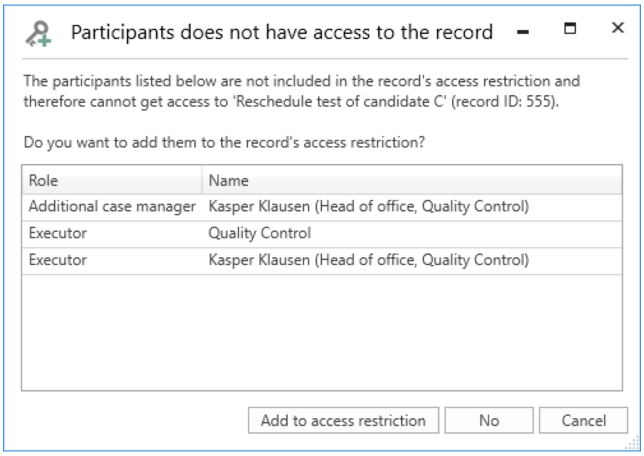


Figure 85: Advanced metadata fields on a record

The advanced record metadata fields are described below.

Field	**Description**
"Title"	"Title" is shown in every metadata field view. It is a free text field describing the record. A title is entered when the record is created. It may be changed later.
"Access restricted to"	Any access groups (users/teams/security groups, etc.) for the record are specified here. This field limits the access to the listed users and groups. Regardless of the record's access level as specified in the "Access" field, only users/groups that have been added to this field can access the record. However, the access level is still in effect, which means that anyone added to this field must <u>also</u> be included in the record's access level. When the user adds an access restriction, the dialogue "Participants do not have access to the record" may appear, notifying the user if other users or units will lose their access because of the restriction. This dialogue is also called the access assistant.  **Figure 86: "Participants do not have access to the record"** It is possible to activate the access assistant for units. This configuration is made in cooperation with cBrain.

Field	Description
	Note: When an access group is added or removed, the log will show which user made the change and when. **Note**: If a user adds a security group to a record which already has one or more security groups, the number of users who can access the record will increase. **Note**: If a user with restricted access (in the user properties) is added to the "Access restricted to" field, either the authority, a unit, or the user's security group must also be added to this field, and the "Access level" must be "All". Otherwise, access to the record is reduced to the restricted access user.
"Case access restricted to"	Any access groups on the record's case are shown here. This field is empty unless three conditions are met: the record is added to a case, "Case access" is ticked, and the case has an access restriction. If the above criteria are met, F2 automatically transfers the users, units, teams and/or security groups from the case access restriction to this field. **Note**: If a user with restricted access (in the user properties) is added to the "Access restricted to" field, either the authority, a unit, or the user's security group must also be added to this field, and the "Access level" must be "All". Otherwise, access to the record is reduced to the restricted access user.
"Case access"	If this box is ticked, the access restriction on the record's case is automatically transferred to the record. This means that an access restriction added to the case is applied to all its records. To avoid transferring the access restriction, the restriction must be replaced by a new one on the record. This is done by adding the relevant users and units to the "Access restricted to" field. Note that the "Access" field determines the access level on the record and also affects which users can access said record. The "Access" field is described in the *Standard metadata fields* section. **Note**: The "Case access" field is automatically ticked upon a record's creation even if it is not attached to a case. A caseless record is implicitly access restricted to the user's authority.

Field	Description
"Suppl. case mgr."	Add any supplementary case managers on the record here. These are users, teams and/or units that help with the case proceeding without being responsible for the record. For further information on adding supplementary case managers, see the section *Adding a supplementary case manager*.
"Record participants"	Add participants other than the sender, recipient, case manager, supplementary case manager, and the responsible participant to the record. **Note**: Suggestions in the "Record participants" field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
"SSN/CVR no."	Add an SSN or CVR number to the case.
"Record type"	Used to distinguish between records sent to external participants, received from external participants or for internal work. The following record types are available: • "Outbound" If an email record is sent to an external participant, the record type is automatically set to "Outbound". • "Inbound" If an email record is sent from an external participant, the record type is automatically set to "Inbound". • "Internal" All records for internal work and communication are automatically assigned the record type "Internal".
"Previous case no."	If the record was added to another case or exists in another system, the original case number is shown here. This field can also be filled in by the user.
"Remind date"	A remind date is a date used in connection with reminders that may be added to the record. This is to remind the user of taking action, e.g. following up on a record, in due time before its deadline expires. **Note**: The reminder date is <u>not</u> the same as a pop-up reminder, but is used as a basis for searches and for sorting lists.

Field	Description
"Received date"	This is the date when the record was received. This is set automatically if the record is sent electronically. If the record originated as a physical letter, it is possible to enter the received date manually. This is useful for distinguishing the date printed on the letter from the date it was received. If the record is sent electronically, a value identical to the letter date will be entered automatically in this field.
"Created date"	This field shows the date when the record was created followed by the name of the user who has created it. **Note:** For incoming emails, "Created date" is when the record was created in F2.

Metadata fields on a record with the unit casework line

A user is able to monitor the recipient's processing of a record sent to users or units with the "Send" function. This is done from the record window's "Advanced" tab by ticking the "Unit casework line" box before sending the record.

When a record is sent to an internal user or unit, the "Unit casework line" is created for each recipient, both users and units.

The "Unit casework" line only appears when the record is sent. It is visible when the advanced metadata fields are shown. The line is always visible to the recipients regardless of which field of groups are displayed.

Unit casework line

Show extended metadata fields

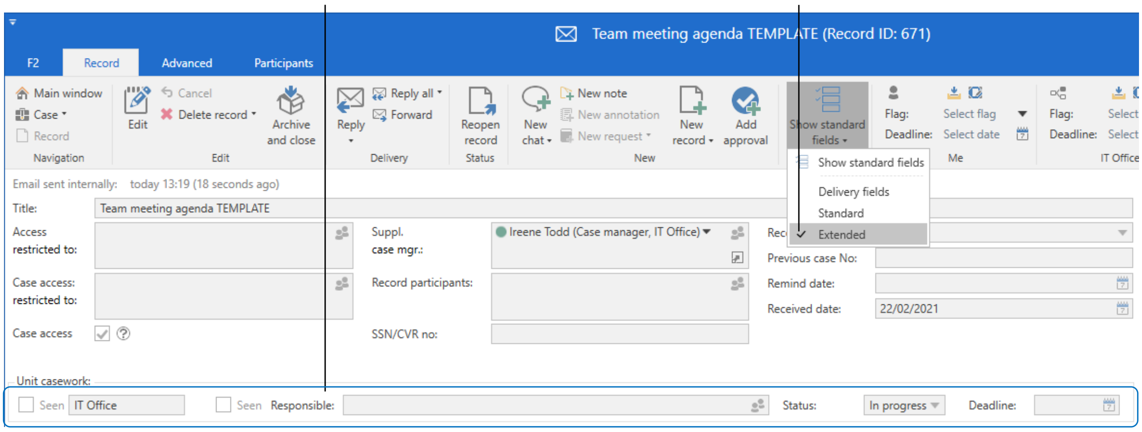


Figure 87: Record metadata fields including the unit casework line

For further information on using the unit casework line, see the section *The unit casework line.*

The metadata fields of the unit casework line are described in the table below.

Field	Description
"Seen" (by unit)	Indicates whether a user in the unit has seen the record.
"Seen" (by responsible user)	Indicates whether the responsible user has seen the record.
"Responsible"	The "Responsible" field specifies the user who is responsible for the record in the recipient unit. If a record is sent to a specific user, their unit is displayed here until they have seen the record.
"Status"	The recipient specifies the record status in the receipt registration. This informs the sender whether the record has been completed or is still in progress.
"Deadline"	Here, the record recipient adds a deadline. Update the "Deadline" field by clicking on the calendar icon to the right of the field or by entering the date in dd-mm-yyyy or a corresponding format. A user can also enter a date by typing e.g. "+10" to set a deadline 10 days from the current date. When the user leaves the field, F2 automatically changes the format to dd-mm-yyyy. Consequences of editing a deadline: The record will be included in the standard searches "Deadline tomorrow: Me" and "Deadline tomorrow: Unit" when appropriate.

The record’s documents

The following sections describe the elements of the record window in which documents are displayed and edited. This includes the record document, which is the default document shown in the record editor pane.

The record’s document area

To the right of the record metadata fields is the document area which shows any documents attached to the record. This element is described in the *Attaching documents* section.

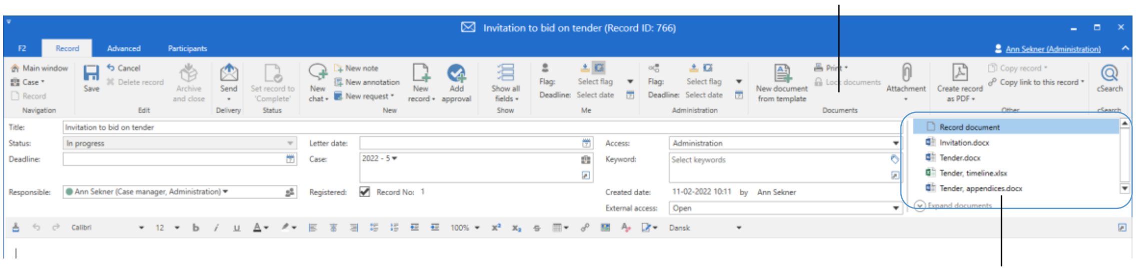


Figure 88: Document area

When a document is selected from the document area, it is shown in the record editor pane. A document is edited by double-clicking on it, which opens its associated programme.

The “Documents” menu group offer menu items pertaining to the record’s documents. It is described in detail in the section *Menu items on the record ribbon*.

The order of the documents listed in the document area can be changed by dragging one document to a location above or below another. This is useful to ensure the correct order of the attachments when printing the entire record as a PDF file.

If a record has many documents, the document pane may be expanded by clicking **Expand documents**.

Figure 89: Expand document area

To minimise the pane, click **Collapse documents**.

Figure 90: Collapse document area

The width of the document area can be adjusted by clicking and dragging the grey edge left or right. By default, a given record window’s document area retains the width chosen by the user the last time a record of the same type was adjusted. This can be deactivated for each record view type in the “Setup” dialogue. For further information, see the *F2 Desktop – Settings and Setup* manual.

The record editor pane

The record editor pane is shown below the record metadata fields.

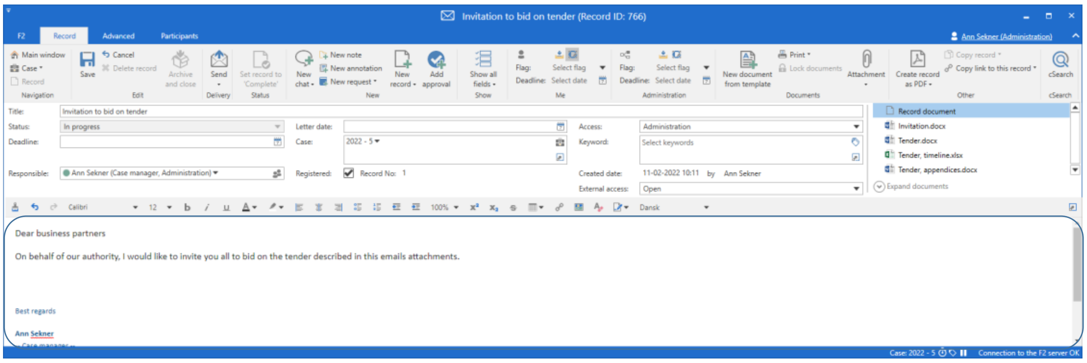


Figure 91: The record editor pane

This is a standard text editor with common functions such as font types, sizes, colours, etc. Here the user enters the text of the record document.

Note the following functions:

Icon	Function	Description
	Undo/Cancel undo	Clicking on the left arrow cancels the last action in the editor. Clicking on the right arrow cancels the last undo action. These functions work as long as the changes have not been saved.
	Add/Edit hyperlink	Add or edit a hyperlink in the editor. Clicking the icon opens the “Add/edit hyperlink” dialogue. Here the user enters the text/title in the “Text display” field and the URL itself in the “URL” field. Clicking **OK** creates the text as a hyperlink in the record document.
	Insert signature	Click **Insert signature** to open a drop-down menu containing available email signatures. Read more about signatures in *F2 Desktop – Settings and Setup*.

Note: F2’s default configuration is the Calibri font with single line spacing.

The text editor’s context menu contains options for default language and spell checker in addition to options for the direction of writing.

Right-click a URL or f2p link to open the link in a new window regardless of the record’s state.

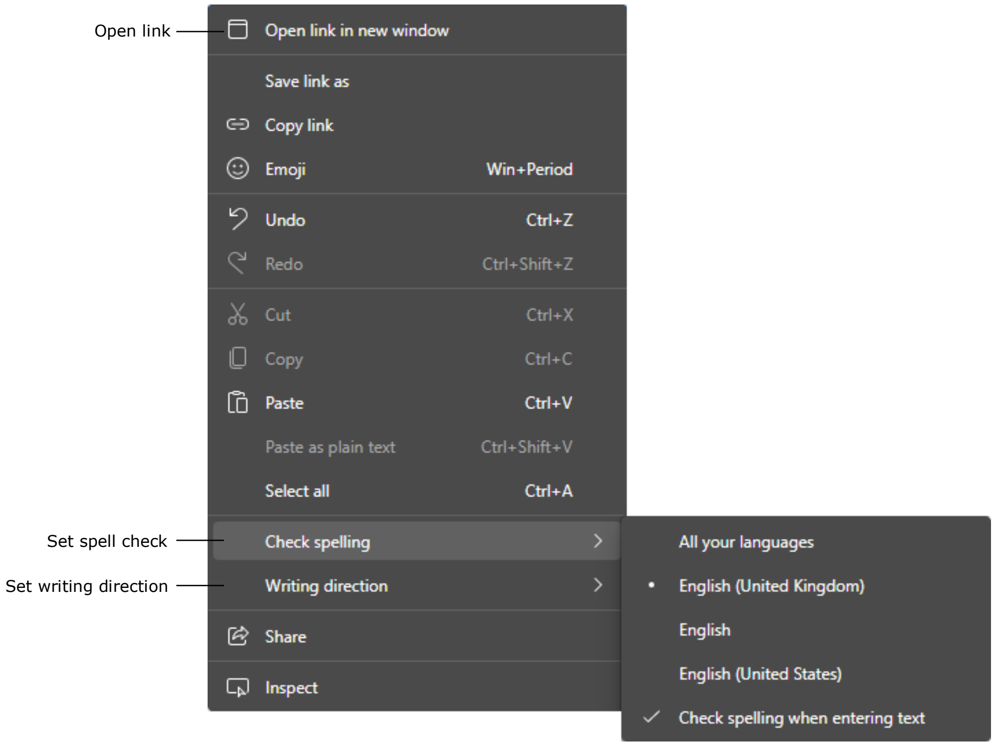


Figure 92: A selection of options in the editor's context menu

Previewing attached documents

F2 generates a preview of all documents attached to a record. Select an attached document to display a preview in the record window's editor pane.

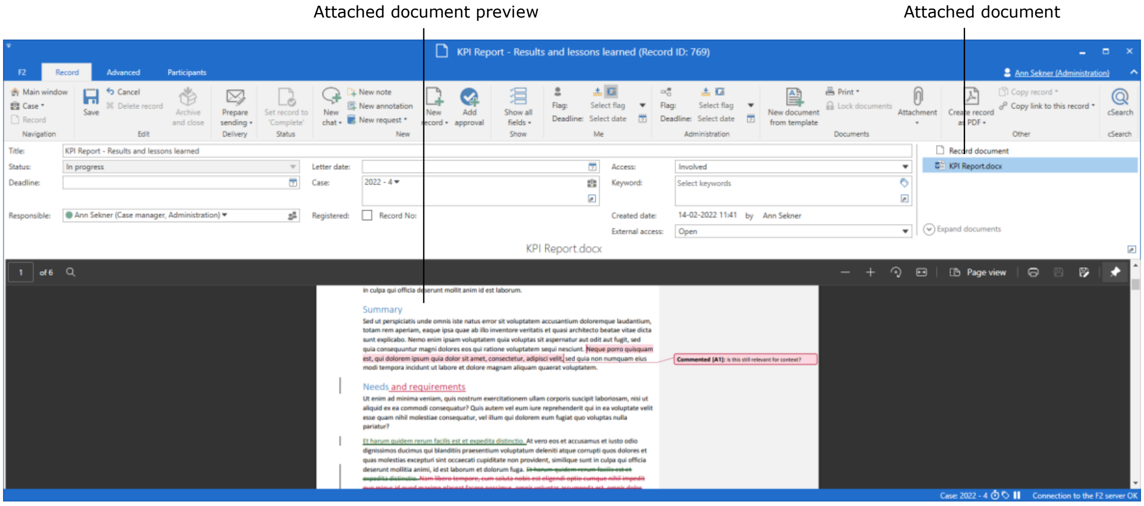


Figure 93: Preview of attached document

Note: When previewing Word documents, comments and changes in the file are also shown. These are also included when printing via PDF unless they are removed from the document.

Larger attached images are scaled down so the preview always shows them in full. See the example below.

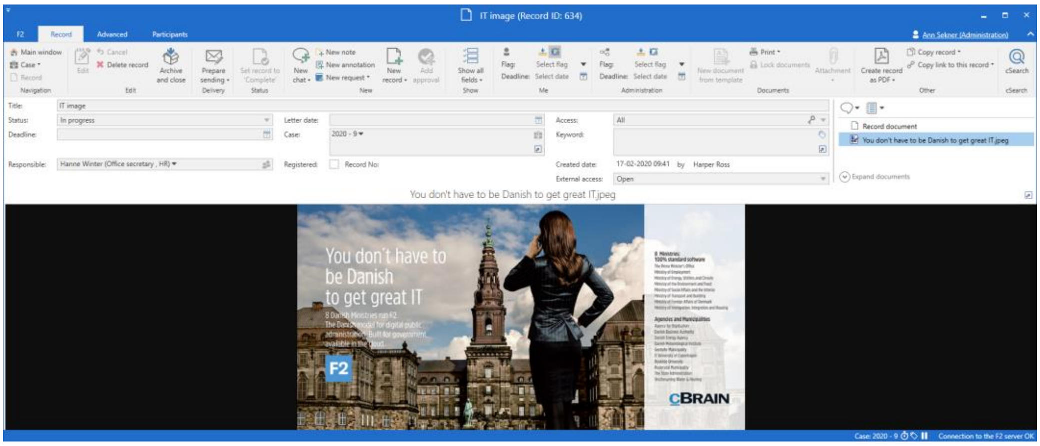


Figure 94: Image previews are scaled down to show entire image

Attachment icons

The icons representing attached documents depend on the programmes installed on the user's PC. F2 displays the icon of the default programme with which the file type is associated. This is the programme in which an attached document opens.

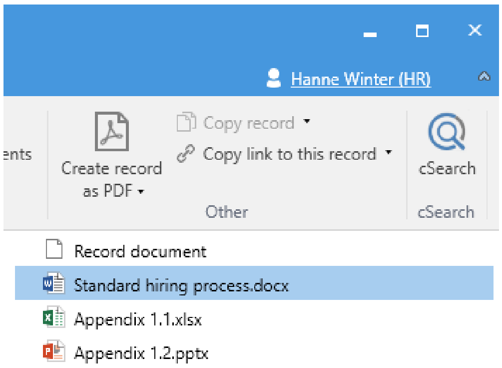


Figure 95: Attachment icons

Context menu for attachments

The user can right-click on an attached document to display its context menu, which is shown below:

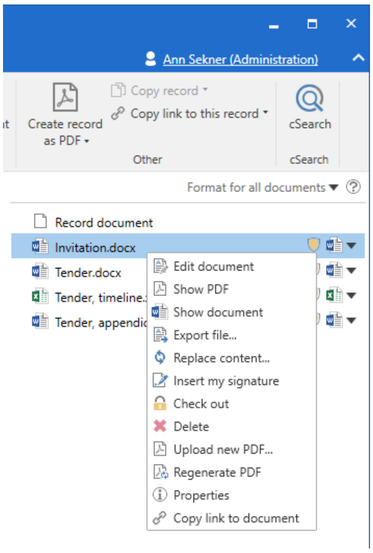


Figure 96: Context menu for an attachment

The following table describes the functions of the context menu.

Function	**Description**
"Edit document"	Available when the record is in edit mode and the user has write access to the record. This function opens the attached document in its associated programme, e.g. Word, Excel or PowerPoint. The user can edit and save the document in the opened programme. When the document is closed, the record is automatically updated.
"Show PDF"	Opens the document in PDF format.
"Show document"	Opens the attachment in its associated programme. The icon for this function shows in which programme the attachment will open. For example, a Microsoft Word icon will be shown for .docx files. The document will open in read-only mode. This function cannot be used to update the document in F2.
"Export file…"	Opens a File Explorer window which lets the user save the document locally.
"Replace content"	Opens a File Explorer window which lets the user replace the attached document with another document. This function is available when the record is in edit mode.
"Insert my signature"	Merge the user's signature phrase with the document. Requires the F2 Signed Approval add-on module. Read more in *F2 Signed Approval – User manual*.
"Check out"/"Check	Enables the user to check out a document from F2 to a local folder and work on it offline. The document can be checked

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>in”/“Cancel check out”</td><td>back into F2 when the work is done. For further information, see the section Checking out and checking in documents.</td></tr>
<tr><td>“Delete”</td><td>Deletes the attachment from the record.

Only users with sufficient rights can delete an attachment, and the record must be in edit mode.</td></tr>
<tr><td>“Upload new PDF…”</td><td>Upload a PDF version of the attachment. This is used when an original document has restricted access, but it is necessary to have e.g. a summary that is accessible to all users.</td></tr>
<tr><td>“Regenerate PDF”</td><td>Forces the system to recreate the PDF version of the document. This may be useful if the PDF version looks different than expected.</td></tr>
<tr><td>“Properties”</td><td>Opens the dialogue below to show the document’s properties. If the record is in edit mode, it is possible to edit e.g. the document’s title and add information on its archiving type and archival location.

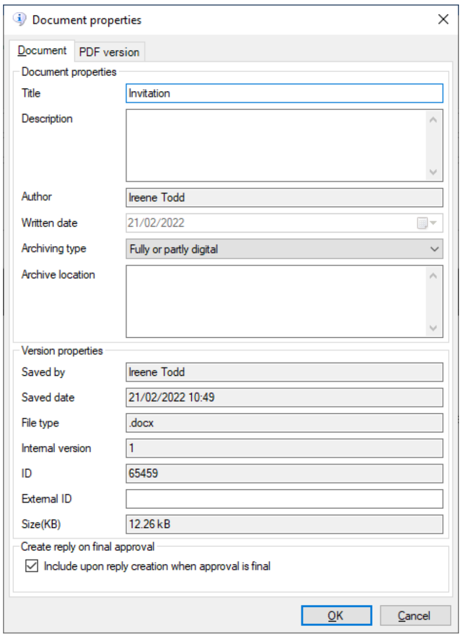


Figure 97: “Document properties” dialogue

In the “Archiving type” field, the user can indicate whether the document is fully digital (and 100% archived in F2) or whether parts thereof (or possibly its full content) exists in a physical version. This may be the case with large books unsuitable for scanning.

The options are “Fully or partly digital”, “Paper” and “Not relevant”.

For documents of the “Fully or partly digital” and “Paper” archiving types, the user can add further information about the</td></tr>
</table>

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td></td><td>physical location of the document in the “Archive location” field, e.g. “Archive, shelf 4, row 5.”

The “Size (KB)” field denotes the file size.

The checkbox “Include upon reply creation when approval is final” requires the F2 Signed Approval add-on module. Read more in F2 Signed Approval – User manual.

The “PDF version” tab shows the details of the PDF version of the attachment.

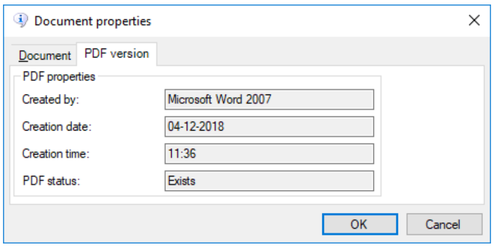


Figure 98: Document properties for PDF version

This tab shows whether the PDF version was created by F2 or if a version was uploaded by a user, its creation date and time, and a status for the PDF generation of the attachment.</td></tr>
<tr><td>“Copy link to document”</td><td>Copies a link to the document to the clipboard.</td></tr>
</table>

Checking out and checking in documents

A document can be checked out of F2 and saved locally. This makes it possible to work on a checked-out document while F2 is offline, but it also enables several users to work on the same document simultaneously.

With the record in edit mode, right-click the document and select **Check out**. The document is saved to a folder with the following path: %appdata%\cBrain F2\Check Out\{unique ID}\. A padlock appears on the checked out document in the document area to show that is has been temporarily locked in F2. If another user attempts to edit a checked out document, F2 blocks the editing and displays an error message.

To return the edited document to F2, enter the record into edit mode again. Right-click the checked-out, locked document in F2, and select **Check in**. F2 automatically identifies the local copy of the document and adds it to the record, replacing the older version of the document.

It is possible to cancel a user’s check-out. With the record in edit mode, right-click on a document that has been checked out, and select **Cancel check out**. The document may then be checked out again.

The difference between **Export file** and **Check out** is as follows:

- When using **Export file**, it is up to the user to choose a location in which to save the file. Effectively, a copy is being made which F2 does not track.

- When using **Check out**, the document is copied to a specific F2 Windows folder with a unique ID, and F2 tracks this copy. This makes the check-in process of the updated document both faster and easier.

Menu items on the record ribbon

Menu items on the record ribbon

Menu items for working on the record are found on the record ribbon.

Many functions pertaining to a record depend on its status and the user's access level.

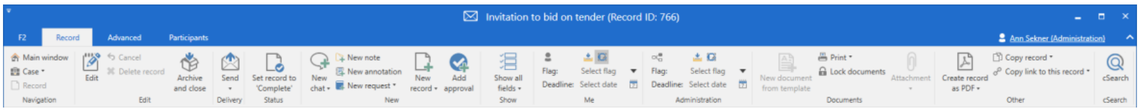
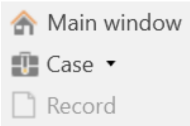
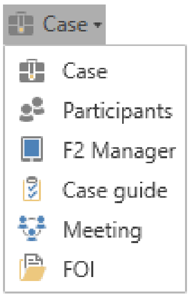
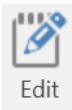


Figure 99: Menu items of the record ribbon

The table below describes the menu items on the record ribbon.

Menu item	Description
	Navigate between the main and case windows by clicking one of them. By clicking the drop-down arrow next to "Case", it is possible to navigate to the case tabs "Case" and "Participants". If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under **Case** as shown below.  **Figure 100: Drop-down menu for "Case"** It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode. The "Record" menu item is only active in the main or case window.
	When a record is in read-only mode, click the **Edit** button to make changes to the record document, its attachments, and its metadata fields. When a record is in edit mode, the "Edit" menu item is replaced with the "Save" menu item below.
	Save changes to the record document, its attachments or its metadata fields by clicking **Save**. The record cannot be saved if a validation error is found. This error occurs e.g. when an invalid value has been entered into

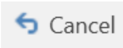
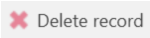
<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>a metadata field. The field will turn red and the “Save” button becomes inactive.</td></tr>
<tr><td></td><td>Cancel any changes made to the record document, or its metadata fields.</td></tr>
<tr><td></td><td>
Depending on whether the record has been shared, Delete record works in two different ways.
When the user deletes a record, F2 asks the user to confirm this action.
Users with the privilege “Can delete shared records for everyone” have the option to Delete for everyone via a drop-down menu.

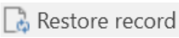
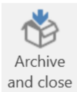
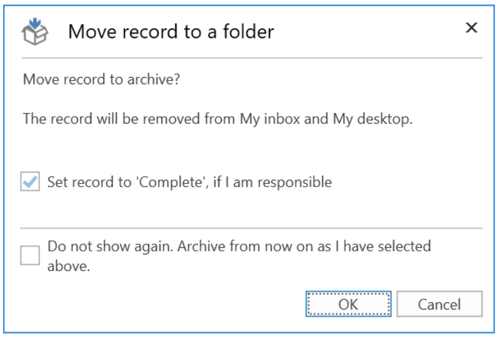
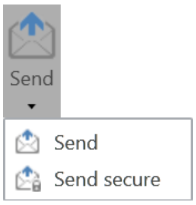
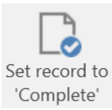
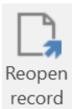
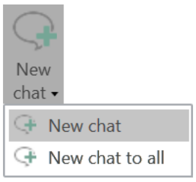
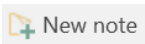
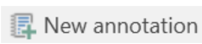
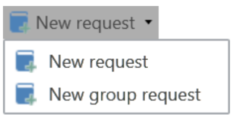
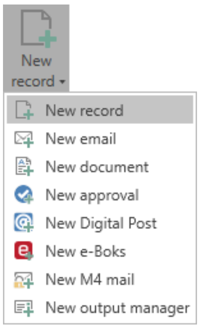
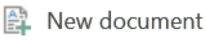
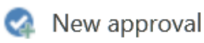
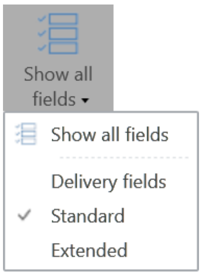
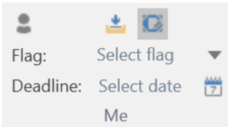
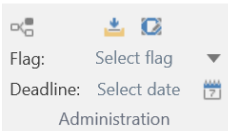
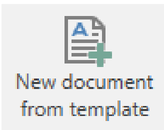
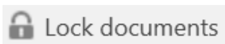

Figure 101: Drop-down menu for “Delete record”
Read more in the Delete record section.
</td></tr>
<tr><td></td><td>
This menu item is visible when a record has been deleted and then opened from the “My deleted records” list.
Before a record is restored, F2 asks the user to confirm this action.
</td></tr>
<tr><td></td><td>
This button helps the user “tidy up” the record by removing it from the user’s inbox and desktop.
If the user has the responsibility for the record, the record’s status can be changed from “In progress” to “Completed”.
When the user archives a record, the following dialogue appears.


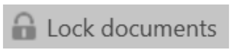
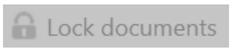
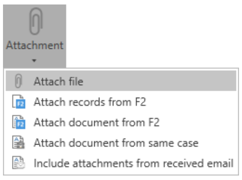
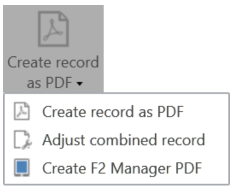
Figure 102: “Move record to a folder” dialogue
</td></tr>
</table>

Menu item	Description
	Click “Prepare sending” to display the delivery metadata fields used for sending the record as an email. When adding a recipient, this menu item changes to either “Send” or “Send secure”, depending on the configuration. For further information, see below.
	The “Send” menu item is used to send an email record (internally or externally). “Send secure” is a configuration with which an encrypted email record can be sent from F2 to external recipients. The security level of email records sent internally in F2 is already correspondingly high, so internal email records need not be sent using this function. Use of this function presupposes that the organisation has a third party provider to sign and encrypt the email records F2 marks as “Send secure”. Email records sent securely are marked with the icon. F2 is configured in cooperation with cBrain.
	Changes the record’s status from “In progress” to “Complete”. When the record is completed, this menu item changes to “Reopen record”, which is described below.
	Reopen a record. Changes the record status from “Complete” to “In progress”.
	Open the chat window from which a new chat can be added to the record. By clicking the drop-down arrow, the user can select “New chat to all” which automatically adds all the record’s internal participants to a new conversation. For further information on chats, see the *Chat* section.
	Open the note window from which a new note can be added to the record. For further information on notes, see the *Notes* section.
	Open the “New annotation” dialogue. For further information on notes, see the *Annotations* section.
	Open the “New request” dialogue from which a new request can be created.

Menu item	Description
	Select either a regular request or a group request via the drop-down menu. Both types are add-on modules and respectively enable: • Internal requests: Internally in one F2 authority. • Group requests: Between two F2 authorities on the same installation. For further information, see *F2 Request – User manual* and *F2 Group Request – User manual*.
	Click on **New record** to open the "New record" dialogue. For further information on this dialogue, see the *Creating a new record* section. Click the drop-down arrow to open a menu with the following items: • New record • New email • New document • New approval (add-on module) • New Digital Post (add-on module) • New e-Boks (add-on module • New M4 mail (add-on module) • New output manager (add-on module). Each menu item creates a new record whose metadata are adjusted according to the selected type. The submenu items are described below.
	Create and open a new email record with the user as sender. For further information on creating and sending emails, see the *Email* section.
	Open the "New document" dialogue from which a document template can be selected. This creates a new record with an attached document based on the selected template. This document will open so the user can work on it, while its record opens in the background. For further information on the "New document" dialogue, see the *Attach records from F2* section. **Note**: The newly created record inherits the title from the attached document.
	Open the "New approval" dialogue from which a new record with an approval can be created.

Menu item	Description
	F2 Approvals is an add-on module. For further information, see *F2 Approvals – User manual*. The "New approval" dialogue offers the same options as when creating a new record. These are described in *Creating a new record*.
New Digital Post	Open the "New Digital Post" dialogue from which a new Digital Post can be created. Requires the add-on module F2 Digital Post (Next Generation). Read more in *F2 Digital Post (Next Generation) – User manual*. The "New Digital Post" dialogue has the same options as the "New record" dialogue. These are described in *Creating a new record*.
New e-Boks	Open the "New e-Boks" dialogue from which a new Digital Post for e-Boks can be created. Requires the add-on module F2 Digital Post (e-Boks). Read more in *F2 Digital Post (e-Boks) – User manual*.
New M4 mail	Open the "New M4 mail" dialogue from which an M4 mail can be created. Requires the add-on module F2 Digital Mail (M4). Read more in *F2 Digital Mail (M4) – User manual*. The "New M4 mail" dialogue has the same options as the "New record" dialogue. These are described in *Creating a new record*.
New output manager	Open the "New output manager" dialogue from which a new record with an output manager can be created. Requires the add-on module F2 Output Manager. Read more in *F2 Output Manager – User manual*. The "New output manager" dialogue has the same options as the "New record" dialogue. These are described in *Creating a new record*.
Add approval	Add an approval to an existing record. F2 Approvals is an add-on module that aims to facilitate the process of approving work material. Read more in *F2 Approvals – User manual*.

Menu item	Description
	Select which metadata fields to display in the record window. When opened, a record is shown with the metadata fields specified on “Record view” via the “Setup” menu item on the “Settings” tab in the main window. For further information, see the *F2 Desktop – Settings and Setup* manual. The “Show all fields” drop-down menu lets the user choose between the following groups of metadata files: • Delivery • Standard • Extended. These fields are described in *Record metadata*.
	A user has several managing options for records in F2: • Placing record • Flagging a record • Deadline for a record. These options are described in further detail in the *F2 Desktop – Management and Organisation* manual.
	A user has several managing options for records on behalf of his/her unit in F2: • Unit’s placement of a record • Unit’s flagging of a record • Unit’s deadline for a record. These options are described in further detail in the *F2 Desktop – Management and Organisation* manual.
	Open the “New document” dialogue from which the user can add a document template to the record. Read more in the *New document from template* section.
	Two print options are available for a record: • “Print”: Use this option to print only the record document and its metadata. • “Print attachment”: Use this option to print one of the record’s attached documents. This menu item is only active if the user has selected an attachment.
	Click to lock the record’s documents temporarily to prevent them from being edited.

Menu item	Description
	The menu item is only active when the record is in edit mode. When a record's documents are locked, the menu item changes to a darker colour:  **Figure 103: Documents are locked** Locked documents cannot be edited until they are unlocked by the same user or another user with full write access to the record. The locked state cannot be changed if the record has been sent or received as an email. In this case, the menu item is deactivated:  **Figure 104: Documents cannot be unlocked** **Note**: Locking a record's documents includes the record document itself.
	Open Windows File Explorer to select a file and attach it to the open record. Clicking the drop-down arrow opens a menu with the following menu items: • Attach file • Attach records from F2 • Attach document from F2 • Attach document from same case • Include attachments from received email. The menu items are described in the *Attaching documents* section.
	Create a PDF version of the record and its attachments. Click the drop-down arrow to display a menu with the following items: • Create record as PDF • Adjust combined record • Create F2 Manager PDF. The created PDF will open automatically in the programme associated with PDF files. Each menu item is described below.
	By default, F2 creates a joint PDF file containing a standard front page, the record document and any attachments.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>

Each page of the PDF contains a header displaying the title and number of the record and the attachment.

The first page of the PDF contains certain record metadata:

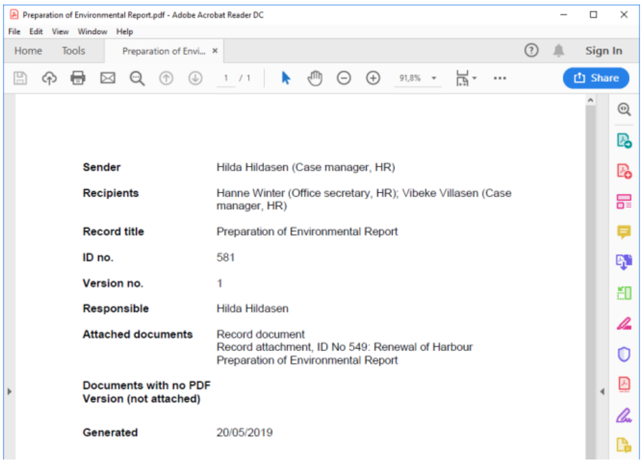


Figure 105: PDF file created from record

Note: The template used when generating the PDF can be adapted to the organisation's needs. Configurations are made in cooperation with cBrain.

</td></tr>
<tr><td>Adjust combined record</td><td>

Opens the "Settings for the combined record PDF" dialogue. Here the user selects which documents to include and whether a header for each should be included.

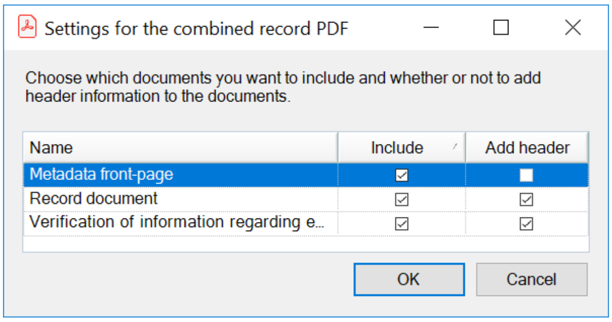


Figure 106: "Settings for the combined record PDF" dialogue

</td></tr>
<tr><td>Create F2 Manager PDF</td><td>

Displays the record as it will appear on F2 Manager on iPad.

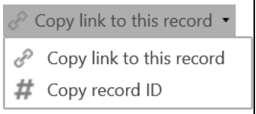
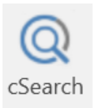
Requires the F2 Manager add-on module. For further information on this, see *F2 Manager – User manual*.

</td></tr>
<tr><td>Copy record
Copy record
Copy to another case
Merge to case parties</td><td>

"Copy record" contains three menu items:

- Copy record
- Copy to another case
- Merge to case parties.

</td></tr>
</table>

Menu item	Description
	For further information on copying records and merging to case parties, see the *Copy record* section.
	Link one record to another via either title or ID. “Copy link to this record” copies a link to the clipboard and can be pasted into another record document. The link will be displayed as the record’s title. **Note**: When clicking a copied link, make sure that only one instance of F2 is running. Otherwise F2 may attempt to open it in the wrong instance. Additionally, the record to which the link refers cannot be in edit mode when the link is used. “Copy record ID” copies the record ID to the clipboard which can then be pasted into e.g. a record document, a chat or a search field.
	Opens cSearch, an advanced, intelligent search engine for F2. cSearch is an add-on module. For further information, see *F2 cSearch – User manual*.

The record ribbon functions

This section describes selected functions of the menu items in the record ribbon.

Delete record

The function of the "Delete record" menu item depends on whether the record has been shared.

A record is defined as shared if the creator has involved another user on it, or if another user has searched for and opened the record.

Involving another user may happen through e.g. a chat, emailing the record, reallocating responsibility or adding a supplementary case manager.

A record with the access level "All" or "Unit" is only counted as shared if it has been opened by a user other than its creator. Once a record has been shared, it cannot be deleted even if the means by which it was shared, e.g. a chat, is deleted.

F2 asks for confirmation before the user deletes a record.

The record cannot be deleted if:

- The user does not have full write access for the record.
- The record is in edit mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
    - The record is attached to a case.
    - The record has been registered.

The tooltip for the "Delete record" menu item will explain why deleting the record is not possible. Hover the cursor over the "Delete record" menu item to view the tooltip.

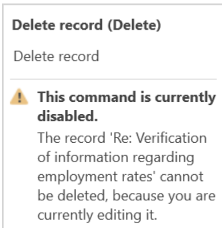


Figure 107: Example of "Delete record" tooltip

Deleting unshared records

Unshared records can be deleted from F2.

If the record has not been shared, clicking **Delete record** has the following consequences:

- The record is removed from all lists and personal folders.
- The record is transferred to "My deleted records" from which the user is able to restore it or delete it permanently.

Note: When deleting a record, it is removed from all lists, including the "Archive", and can only be found in "My deleted records". The record is kept there for 30 days after which the deletion is permanent. The 30-day period can be adjusted to accommodate the needs of the organisation.

Deleting shared records

Only users with the privilege "Can delete shared records for everyone" are able to delete shared records.

If the record has been shared, clicking **Delete record** has the following consequences if the user does <u>not</u> have the aforementioned privilege:

- The record is removed from "My inbox", "My desktop", "My archive", "My sent records", "My chatted records", and any lists created therefrom.
- The record is transferred to "My deleted records" from which the user is able to find any records that they have deleted.
- The record stays in the "Archive" and may still be found via searches.
- Any other users with whom the record has been shared are still able to see it on their lists.

Delete for everyone

The "Delete for everyone" menu item is used to delete a record even if it has been shared. Only users with the "Can delete records for everyone" privilege have access to "Delete for everyone". For other users the menu item is invisible.

Figure 108: "Delete for everyone" menu item

"Delete for everyone" is found in the drop-down menu for "Delete record". Using this, a shared record can be deleted.

The following conditions will block deletion of a record for everyone:

- The user does not have full write access for the record.
- The record is in edit mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
  - The record is attached to a case.
  - The record has been registered.

Clicking **Delete for everyone** has the following consequences:

- The record is transferred to "My deleted records" from which the user is able to find any records they have deleted.
- The record is removed from all other lists, including the "Archive".
- The record may still be found through "Search all over" by users with access to the record before it was deleted.

Deleting a record permanently

A user with the "Can delete records for everyone" privilege can delete shared records permanently. Other users may only permanently delete unshared records.

To permanently delete a record, go to the main window. From here, select the "My deleted records" list.

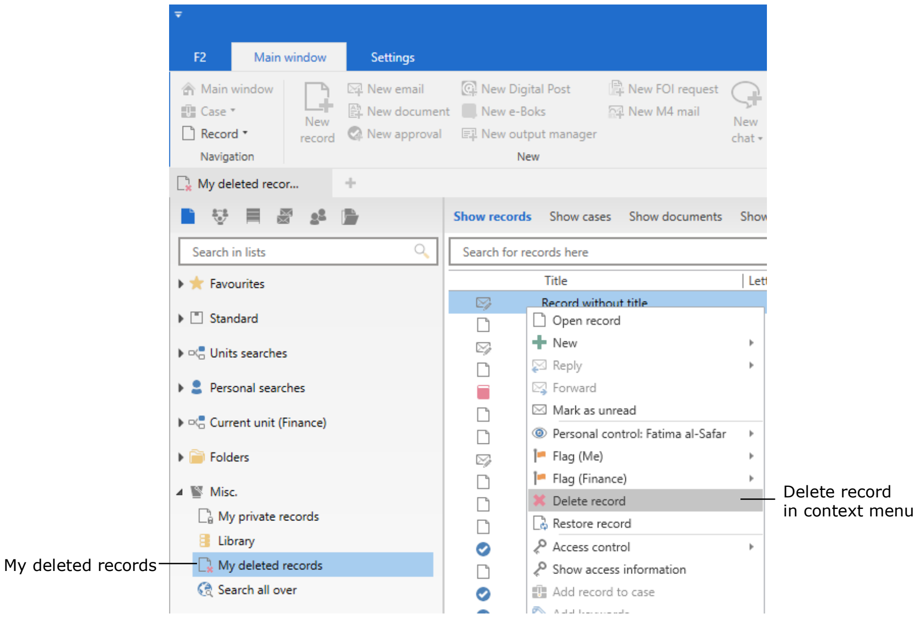


Figure 109: Delete record from "My deleted records"

Select the record and right-click to open the context menu and delete the record from there. F2 asks for confirmation from the user before a record is deleted.

Attaching documents

This section describes the options for attaching documents to a record. Managing and working with documents are described in the section *The record's documents*.

The user may add one or more attachments to a record, e.g. Word, Excel or PowerPoint files. Besides these, other records can also be added to a record as record attachments.

The figure below depicts a record with two attached Office documents and a record attachment.

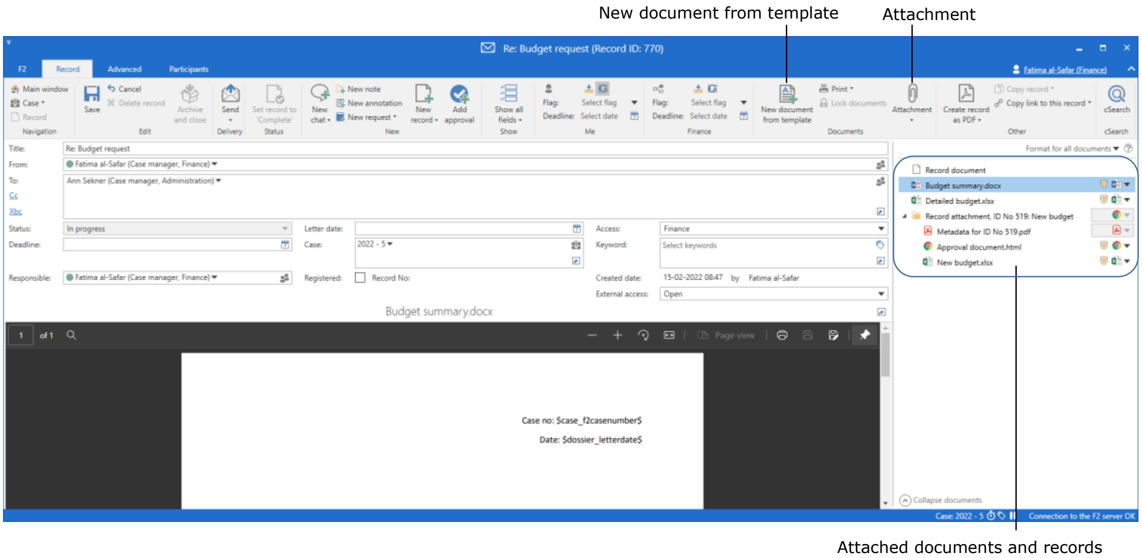


Figure 110: Documents and a record attached

Attachments are added via the "Attachment" menu group in the record ribbon. This includes documents based on Microsoft Office templates, files on the local PC, and items in F2. The separate functions are presented in the following sections.

New document from template

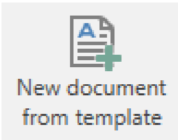


Figure 111: "Attach from template"

The **New document from template** menu item opens the "New document" dialogue where a new Office document can be created based on personal and shared document templates.

Use this function to create new Office documents directly from the record. Creating documents this way will help F2 track them, since they are already attached to a record.

Choose a document template in the dialogue. Enter a title and click **OK**.

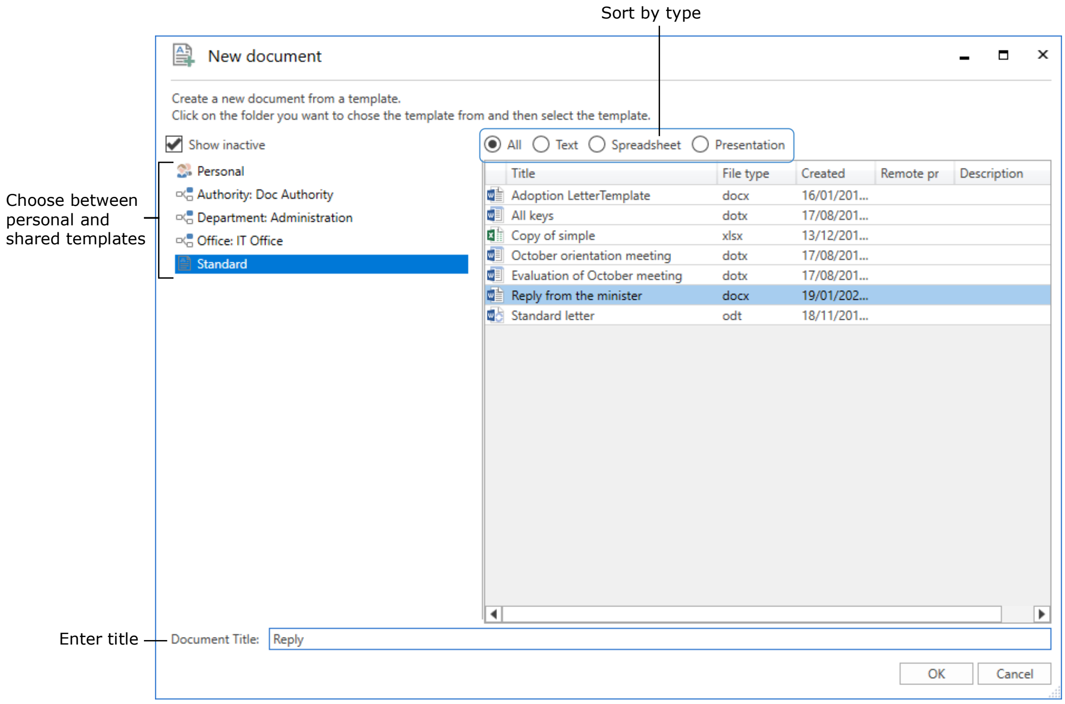


Figure 112: Select document template

F2 opens the document in an associated programme. If the user has selected a text document, Word or another text editor will open. The user can then work on the document as if they had opened the programme directly from Windows.

Note: The programme that opens depends on the file associations on the user's computer.

Note: Since the document is attached to the record, the user only needs to work in the programme and save the work there. F2 will automatically update the record with the document's changes.

Note: Even if the associated programme crashes, the user will not lose their work since F2 regularly saves a version of the document.

All users may create document templates. Shared templates and unit templates are created by users with the "Template administrator" privilege.

Attachment

Clicking **Attachment** opens the Windows File Explorer where a file can be selected and attached to the open record. The function is identical to the **Attach file** function described below.

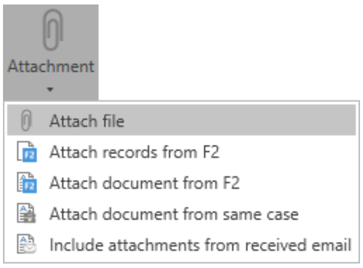


Figure 113: "Attachment" menu item

The "Attachment" drop-down menu contains the following options:

- Attach file
- Attach records from F2
- Attach documents from F2
- Attach document from same case
- Include attachments from received email.

These options are described below.

Attach file

This function lets the user search for and attach documents from various external sources, such as the user's PC, memory sticks, DVDs, etc.

Figure 114: "Attach file"

Click **Attach file** to open the File Explorer from which a file can be selected and imported into F2.

Note: Only files – not folders – may be transferred to F2.

Importing a file through the import folder

A file can be imported to F2 through the import folder in File Explorer. The import folder can be found here: %AppData%\cBrain\F2\F2 Archive folder.

Add files to this folder to import them into F2. A record will be created for each file, with the record title being the file name. The user will be set as responsible for the record.

The image below shows an example of an import folder in Windows containing the PDF file "Overview plans for the harbor renewal 2017". When the F2 window becomes active, a record will be created to which this file is attached.

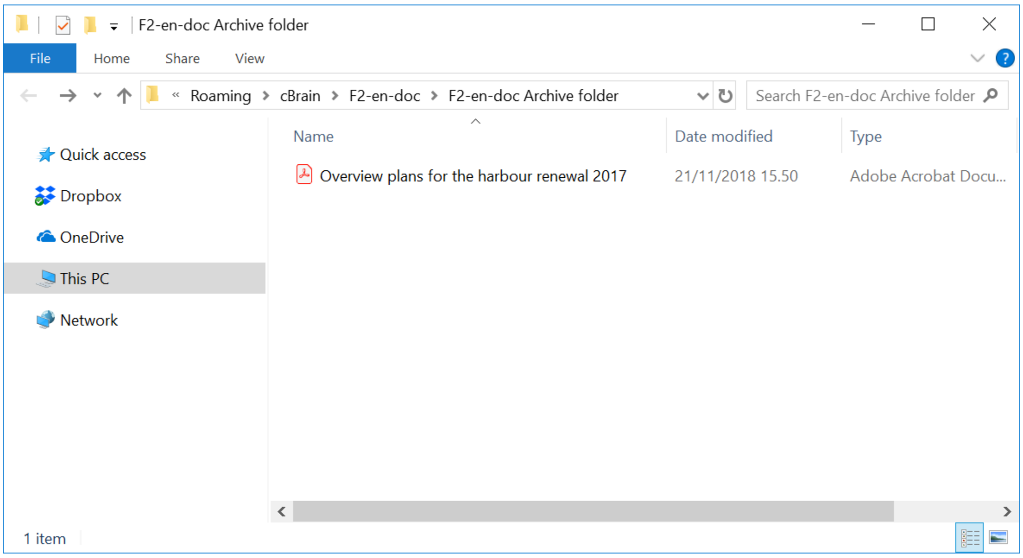


Figure 115: Import folder in Windows

Attach records from F2

The **Attach records from F2** menu item lets the user add a record as an attachment to a record.

Figure 116: "Attach record from F2"

Click **Attach records from F2** to open the "Choose records" dialogue which contains the same search options as F2's main window. These are used for adding one or more records to the open record.

The search window and the attachment process are identical to those described above in the section *Attaching a document from F2*. The one difference is that the user must also select the record format, i.e. whether it is attached as a "Record attachment" or "PDF".

A "Record attachment" contains the record document, a PDF of its metadata, and its attached documents (if any) in their original format. A record attachment is shown in the document area as a folder that can be expanded to show a list of documents.

The "PDF" option will add a PDF file containing the record metadata, the record document and its attachments.

The section *Record attachments in the document area* describes this in further detail.

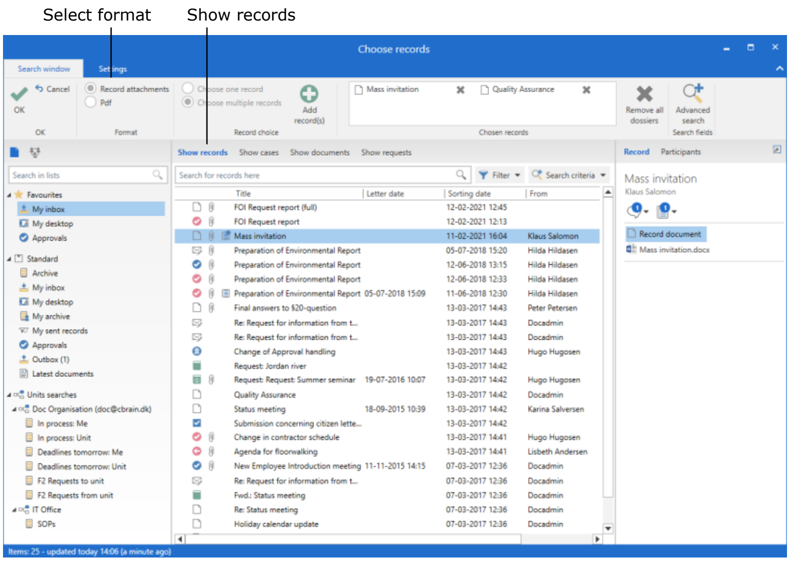


Figure 117: Choose attachment format

It is possible to select multiple records in the main window and drag them to a record to add them as copies.

The procedure is the same as when copying documents from the main window. For further details, see the section *Select and copy multiple documents to a record*.

Record attachments in the document area

A record attached in PDF format is shown in the document area with the other attachments.

A record attached as a record attachment is displayed with a folder icon which can be expanded to show a PDF with metadata and the record's attachments in their original format.

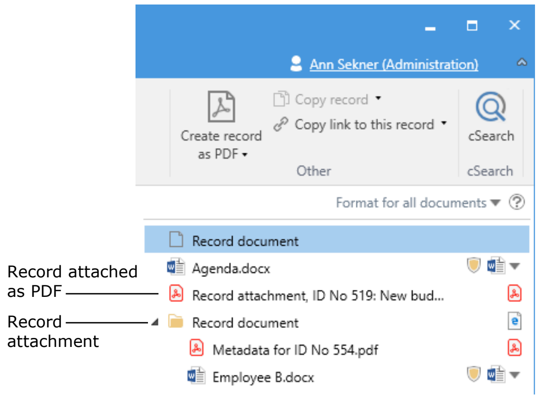
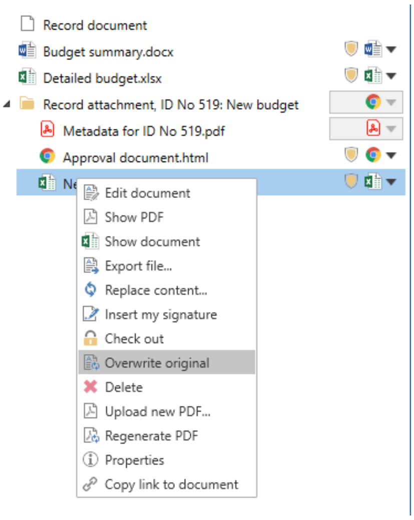


Figure 118: Record attachments



The attached record is a copy of the original.

It is possible to edit the documents of an attached record. To apply these changes to the original document as well, right-click the document in the document area and select **Overwrite original**.

Before the content is overwritten, F2 asks for confirmation from the user.

Figure 119: Overwrite original document

It is not possible to attach a record as a record attachment if that record has a record attachment itself. If the user attempts to attach such a record, the following dialogue appears:

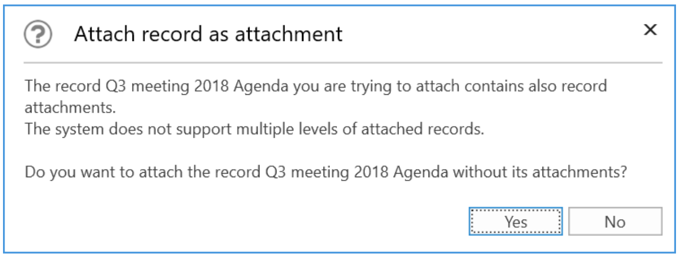


Figure 120: "Attach record as attachment"

Click **Yes** to attach the record without its record attachment.

It is possible, however, to add the record including its record attachments by selecting the "PDF" option.

An email record may contain other email records as attachments which in turn may contain attached email records or documents. When such an email is imported into F2, all its attachments are created as documents on the record, i.e. the structure from the email will not be reflected in F2.

Attaching a document from F2

The **Attach document from F2** menu item lets the user search and copy attachments from other records to the open record.

Figure 121: "Attach document from F2"

Click **Attach document from F2** to open the "Choose documents" window which has the same search options as the main window. Use these to attach one or more documents.

Select **Show documents** above the result list. When a document is selected, a preview appears in the right side of the window.

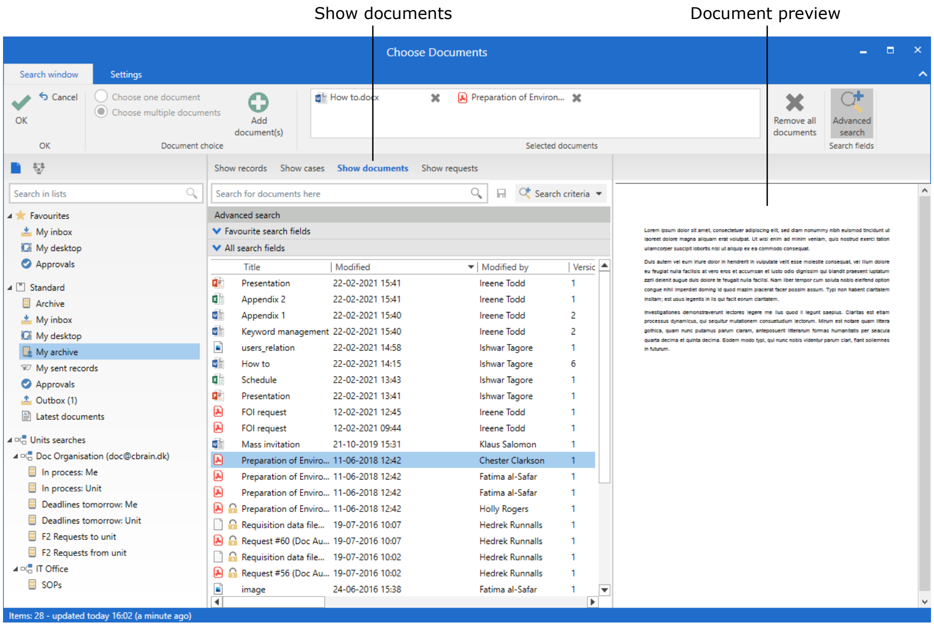
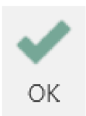


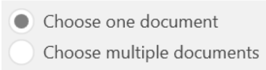
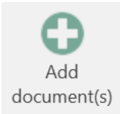
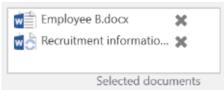
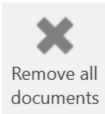
Figure 122: The "Choose Documents" dialogue

Double-click a document to attach it and close the dialogue. The document is then copied and attached to the open record.

To attach multiple documents to the record, click **Add document(s)** in the search window's ribbon. Find the wanted documents and add them to the "Chosen documents" field. Click **OK** to copy and attach the documents to the record.

The "Search window" tab offers the following options:

Function	Description
	When one or more documents have been added to the "Selected documents" field in the dialogue ribbon, click **OK** to attach them to the record.
	Exit the window without attaching any documents.

Function	Description
	Click **Choose multiple documents** to display the "Selected documents" field. When this field is visible, the function is inactive regardless of the number of documents shown in "Selected documents". F2 automatically switches when the user selects one or more documents and clicks **Add document(s)**. If all documents are removed from the "Selected cases" field, F2 automatically switches back to **Choose one document**. This makes it easier to see if one or several documents are being added to the record
	Adds the document(s) selected in the result list. The selected document(s) can be seen in the "Selected documents" field in the dialogue ribbon.
	The "Selected documents" field shows the documents selected by the user. To remove a document from the field, click the ✖ next to its name.
	Removes all documents in the "Selected documents" field in the dialogue ribbon.
	Perform an advanced search using metadata fields. For further information on advanced searches, see the *F2 Desktop – Searches* manual.

Note: Record documents from other records can also be attached, but these attachments <u>cannot</u> be edited.

Select and copy multiple documents to a record

It is possible to copy multiple documents to a record by selecting them in the main window and dragging them to the record window.

Arrange F2's main window next to the record window to which the documents must be copied as shown below. The record must be in edit mode.

Select a list, e.g. "My inbox", and click **Show documents** to view the documents of the selected list.

Select the documents to copy to the record and drag them from the main window to the record window as shown below.

Drop the documents in the document area to attach copies of them to the record.

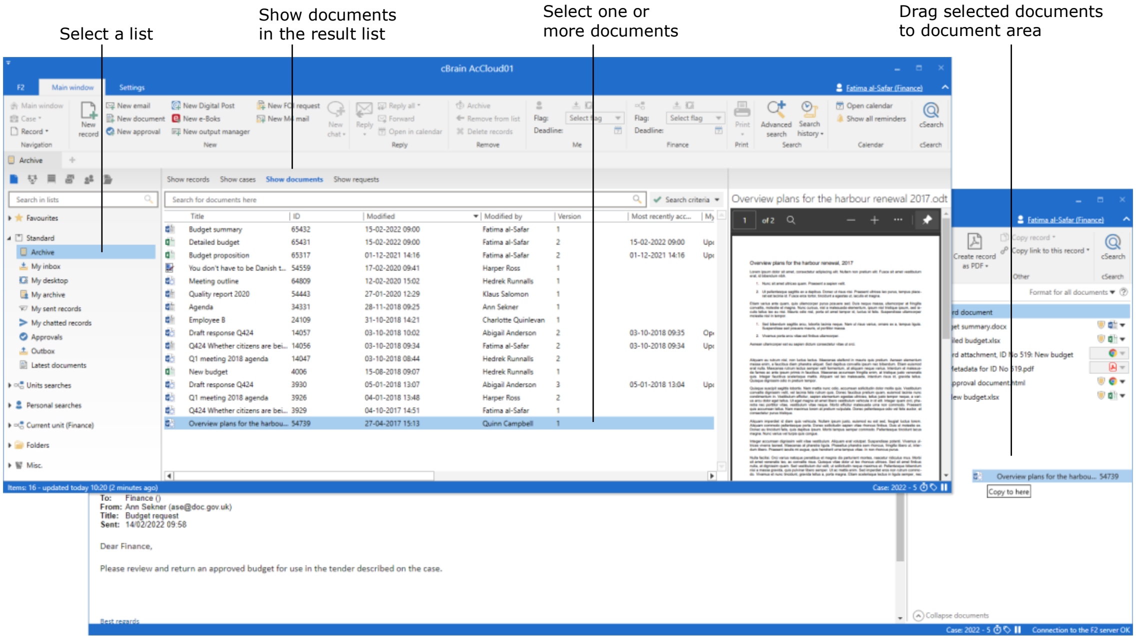


Figure 123: Copy documents from main window to record

Attach document from same case

The **Attach document from same case** menu item is similar to the **Attach documents from F2** menu item. The difference is that the former function narrows down the documents that may be attached to those of the case to which the current record belongs.

Figure 124: "Attach document from same case"

Click **Attach document from same case** to open the "Choose documents" window. The window automatically shows the documents from the case to which the record is attached. Select one or more documents to attach to the record.

The "Choose documents" dialogue is described in the *Attaching a document from F2* section.

Include attachments from received email

Figure 125: "Include original documents"

This function is active when an email record has been created as an answer record.

This is a simple way of attaching all documents from the original email record to the answer record.

Copy record and merge to case participants

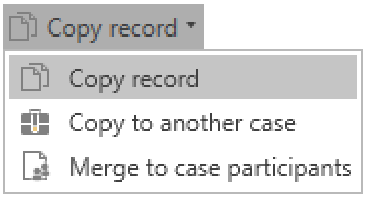


Figure 126: "Copy record" menu item

The following describes the options for copying a record and merging a document template to the case participants.

These functions are found in the drop-down menu of the "Copy record" menu item on the record ribbon.

Copy record

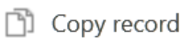


Figure 127: "Copy record"

Click **Copy record** to open the "New record" dialogue from which it is possible to create a copy of the open record.

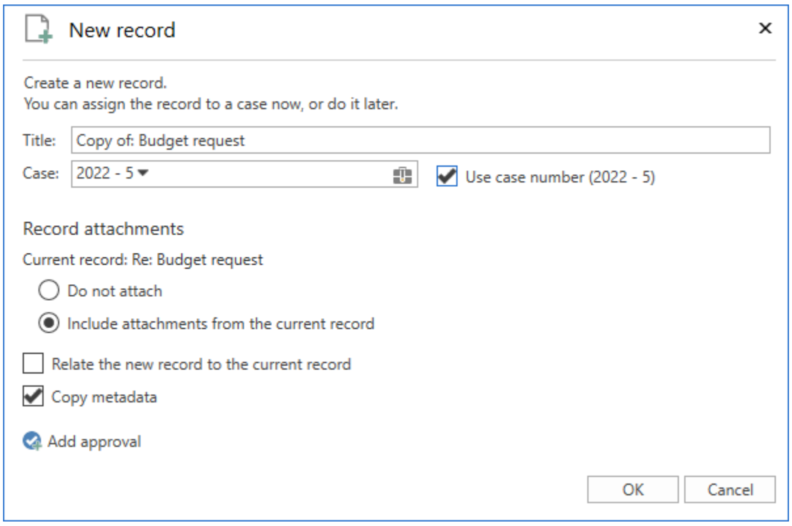


Figure 128: Create new record via "Copy record"

When copying a record, the user must take the following fields into account:

Field	Description
"Title"	Enter the record title here. F2 automatically adds "Copy of [title of original record]" in this field.

Field	Description
"Case"	Add the record to an existing case by entering the case number here, or search for a case by clicking the case icon. **Note**: Suggestions in the "Case" field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain. It is also possible to create a new case for the record. For further information on creating new cases, see the section *Adding a record to a new case*.
"Use case number"	If the original record is attached to a case, the user can tick this box to add the new record to the same case.
"Record attachments"	Choose whether to copy the attachments from the original record to the new record. By default, the option "Include attachments from the current record" has been selected, which means that all attachments from the original record will be copied to the new record. If the attachments are not needed, use the "Do not attach" option.
"Relate the new record to the current record"	Tick this box to create the record as an answer record to the original one. This relation is shown in the "Related records" menu item on the "Advanced" tab of the record window. For further information on related records, see the section *Menu items on the "Advanced" tab*.
"Copy metadata"	By default, the "Copy metadata" box is ticked. Since the new record is a copy of the original record, it is often desirable to copy the metadata as well.
"Add approval"	Requires the add-on module F2 Approvals. Displays fields related to approvals, so the record can be created with an approval flow attached. For further information, see *F2 Approvals – User manual*.

Copy to another case

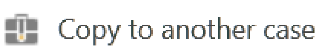


Figure 129: "Copy to another case"

This function is a quick way of copying a record to another case.

Click **Copy to another case** to copy the record as well as its metadata and attachments to another case. The dialogue below appears. From here a case is selected to which a copy of the record is added.

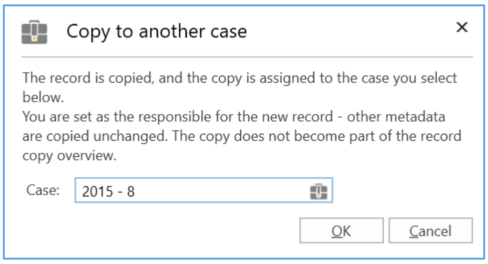


Figure 130: "Copy to another case" dialogue

From this dialogue it is not possible to choose between variations of the record, whether to include metadata, or to create a relation.

Click **OK** to open the new record.

Merge to case participants (add-on module)

Figure 131: Merge to case participants

"Merge to case participants" is part of the F2 Merge Codes add-on module, and the menu item is available only if the module is installed.

This function will add a document from a template to the open record. This template contains one or more merge codes, which may collect information from the participant register, metadata or the phrase archive.

This lets the user merge standard email templates with the participants identified on a given case. More information is available in *F2 Merge Codes – User manual*.

Menu items on the “Advanced” tab

The record window’s “Advanced” tab contains menu items for working with a record. Whether a menu item is active depends on the user’s role and the record’s status. For example, the active menu items of an email record differ from those of a standard record.

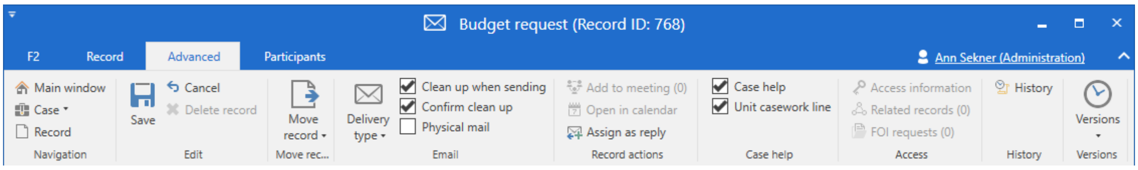
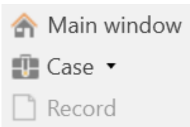


Figure 132: Menu items on the “Advanced” tab

The access level on a record also affect which menu items are active.

The menu items of the “Advanced” tab are described below.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td>
</td><td>Navigate between the main and case windows by clicking one of them.

By clicking the drop-down arrow next to “Case”, it is possible to navigate to the case tabs “Case” and “Participants”. If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under Case as shown below.

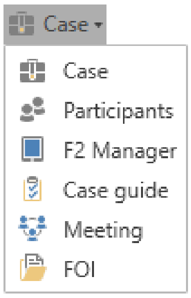
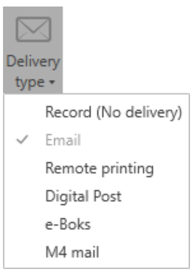


Figure 133: Drop-down menu for “Case”

It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode.

The “Record” menu item is only active in the main or case window.</td></tr>
</table>

Menu item	Description
Edit	When a record is in read-only mode, the user may click the **Edit** button to make changes to the record document, its attachments and its metadata fields. When the record is in edit mode, the “Edit” menu item is replaced with the “Save” menu item.
Save	The user may save changes to the record document, its attachments or its metadata fields by clicking **Save**. The record cannot be saved if a validation error is found. This error occurs e.g. when an invalid value has been entered into a metadata field. The field will turn red and the “Save” button becomes inactive.
Cancel	Use to cancel any changes made to the record document, or its metadata fields.
Delete record	Depending on whether the record has been shared, “Delete record” works in two different ways. When the user deletes a record, F2 asks the user to confirm this action. Users with the “Can delete records for everyone” privilege have access to the “Delete for everyone” menu item via a drop-down menu.  **Figure 134: Drop-down menu for “Delete record”** Read more in the *Delete record* section.
Move record Move to archive Move to private Move to library	The “Move record” drop-down menu contains three items: • Move to archive • Move to private • Move to library. These items are described below.
Move to archive	The menu item “Move to archive” is active for records placed in the “My private records” list. Use it to move a record from here to the shared archive.
Move to private	Click **Move to private** to move a record to the “My private records” list. Only records with the access level “Involved” can be made private.

Menu item	Description
	F2 asks for confirmation before a record is made private. If the record is attached to a case, it is removed and a new version of the record is created. Records from “My private records” may be moved back to the “Archive”. Only the user who moves the record to “My private records” is able to view and access the record. For further information on the “My private records” list, see the *F2 Desktop – The Main Window* manual. Below is a list of situations in which it is not possible to move a record to “My private records” list. • The record is shared with other F2 users. • The record is an email record and has been sent. • The record has been shared via a chat or a note. • The record’s access level is “Unit” or “All”. • The responsibility for the record has been allocated to another user. • The record has a supplementary case manager.
Move to library	This function moves a record to the “Library” list. A record can only be moved to the “Library” list while its access level is “Involved”. Once moved the access level may be expanded. The “Library” list is an archive shared between all F2 users, so records with access level “All” in the “Library” can be seen by all users in the organisation. After it has been moved to the “Library”, a record can be edited as usual. This includes the record’s access level, attachments and metadata. If a record that is moved to the “Library” was added to a case, a copy will be created and the original record will be removed from the case. **Note**: Records can be created directly in the “Library” by selecting the list and clicking on **New record**.
	The “Delivery type” drop-down lets the user choose how to send the record. When the delivery type has been chosen, the relevant metadata fields are added to the record. The menu item’s icon will change to reflect the delivery type. This change also applies to the title bar of the record window:

Menu item	Description
	Record (no delivery) Email Remote printing Digital Post e-Boks M4 mail The delivery type may be changed even when the record is not in edit mode. Changing the delivery type happens instantaneously, and it is not necessary to save the record for the change to take effect. **Note**: The "Delivery type" options depend on the add-on modules of the organisation.
☑ Clean up when sending ☑ Confirm clean up ☐ Physical mail	These menu items may be used when sending email records. • "Clean up when sending": Tick this box to remove the record from "My inbox" and change the record's status from "In progress" to "Complete" when sent. • "Confirm clean up": Tick this box to display the "Clean up when sending" dialogue before sending, allowing the user to confirm or dismiss certain actions relating to the record. • Physical mail: Informs F2 that the email record will be sent as a physical letter and lets the user add e.g. a letter date to the record. Via "Setup" on the "Settings" tab of the main window, the user can choose that F2 ticks all boxes automatically. Regardless of personal settings, it is possible to decide F2's actions each time an email record is sent.
Add to meeting (0)	Use this menu item to add a record to a specific meeting. The number of meetings to which the record is added is shown in brackets. F2 Meetings is an add-on module that aims to facilitate meetings by assisting the user in preparing an agenda,

Menu item	Description
	managing meeting documents and producing minutes. For further information, see *F2 Meetings – User manual*.
Open in calendar	This menu item is active if integration with Microsoft Outlook is enabled on the F2 installation and the record contains a compatible calendar invitation. Click **Open in calendar** to open an attached invitation in Outlook.
Assign as reply	This menu item is used to assign a record as a reply to an incoming email. Click **Assign as reply** to open the "Choose record" dialogue in which the email record can be selected.
Case help	Tick this box to make the "Case help" dialogue appear when the record is saved. The case help is set up during the initial configuration of F2 and supports users in following the organisation's established guidelines for working in F2. For further information, see the *Case help* section.
Unit casework line	When a record is sent to internal users or units, the "Unit casework" line is created for each recipient. The "Unit casework" line appears when the record is sent. For further information, see the section *The unit casework line*.
Access information	Opens the "Access information" dialogue which lists all users with access to the record. Viewing this list requires the "Can see access information" privilege. For further information on this dialogue, see the *Access information* section.
Related records (1)	F2 automatically relates an incoming email with other records when the user clicks **Reply**, **Reply all**, **Assign as reply** or **Forward**. It is also possible to manually relate records to each other when creating a new record. This menu item opens the "Related records" dialogue which lists any related records that may be part of the correspondence. This menu item becomes active when the record is linked to another record. The number in brackets shows the number of related records.

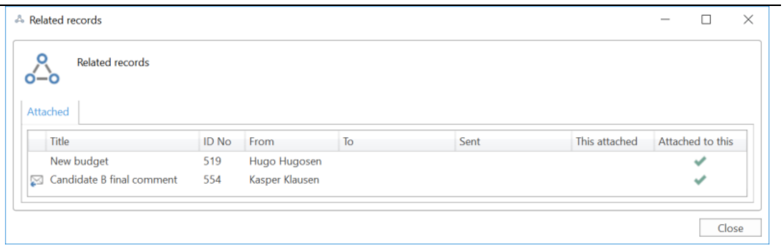
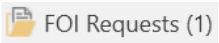
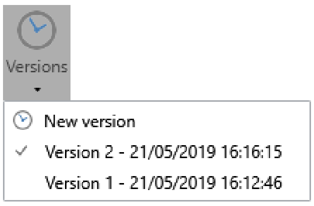
<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>

Figure 135: “Related records” dialogue

This dialogue contains information about sender, recipient, and when the email record has been sent. The columns at the far right show whether the related record precedes or follows the open record.</td></tr>
<tr><td>
</td><td>This menu item is active when the record is part of an FOI request. The number in brackets shows the number of FOI requests in which the record appears.

Clicking FOI Requests opens a dialogue with a list of the FOI requests in which the record appears. FOI request is an add-on module. For further information, see FOI Request, Advanced - User manual.</td></tr>
<tr><td>
</td><td>Opens the “Record history” window which lists all activities registered on the record.

For further information, see the History section.</td></tr>
<tr><td>
</td><td>Create a new version of the record and view previous versions.

For further information, see the Versioning section.</td></tr>
</table>

Functions of the "Advanced" ribbon

This section describes the functions of the menu items on the "Advanced" tab.

Case help

F2's case help assists users in following the organisation's rules and guidelines for case processing.

The case help is set up during the initial configuration of F2 and supports users in following the organisation's established guidelines for working in F2. This means that it may contribute to keeping case work in line with the organisation's wishes regarding its conduct.

An F2 installation typically comes with case help enabled. Depending on its configuration, it may be optional or mandatory for users to follow the case help's suggestions.

The case help also facilitates that deliveries to the National Archives or a similar institution are performed with a minimal search for records that are not associated with a case, but should have been. Registering a record is insufficient if it must be delivered to the National Archives; it must also be associated with a case. The case help can be set up to remind users of this.

> **Note**: If needed, case help can be disabled for individual users. These users are assigned the privilege "No case help for saving or sending records". For further information on assigning privileges, see the *F2 Desktop – Administrator*.

In the case help dialogue "Suggested changes when [action]", the dialogue title informs the user which action that caused the dialogue to open. The action may be saving, sending, forwarding or replying to a record.

The dialogue text offers more context. Suggested changes are based on one of five categories:

- Save record.
- Save record from external participant.
- Send record internally.
- Send record to own unit.
- Send record externally.

The figure below is an example of F2 supporting the user via case help when sending an email record. In this example, management has decided that outgoing email records must be registered, that they must be attached to a case, and that their access level must be "All".

If the sender has not performed these actions already, the case help will open and suggest that the user perform them.

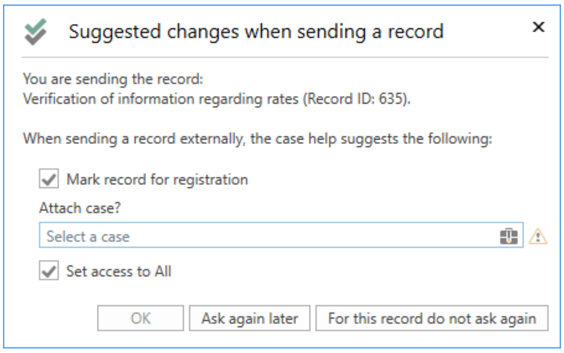


Figure 136: Case help: Suggested changes

When the user has selected the actions to be performed on the record, three options exist:

Function	Description
"OK"	The case help will perform the selected actions on the record.
"Ask again later"	The case help will not perform any actions, but remains active. The dialogue reappears when relevant.
"For this record do not ask again"	The case help will not perform any actions and is deactivated for this record. It may be reactivated via the "Advanced" tab.

Note: The case help does not suggest retaining the currently selected access level or restricting it.

Case help on answer records

If the organisation has decided that records be created with case help, the following applies:

- Case help is activated for records created as a reply to or a forward of a record with case help activated.
- Case help is activated for records created as a reply to or a forward of a record without case help.
- Case help is activated for records that are replies to other records.

If case help is activated for an incoming email record, and the user clicks either **Reply**, **Forward** or **Reply all**, F2 performs the following actions:

- Access level is set to that of the incoming record
- "Case help" is ticked.
- The responsibility is allocated to the user.
- The record is marked as read.
- Flags are removed from "Unit line to case processing".

Note: The case help is configured in cooperation with cBrain.

Access information

Access information shows users with:

- Read access to the record
- Write access to the record's attached documents (including the record document)
- Full write access to the record and attached documents (including the record document).

To access a record, the following conditions must be met:

- The user has read access to the record.
- If the record has an access restriction, the user must be included in at least one of the access groups.

On the "Advanced" tab, click **Access information**. The "Access information" dialogue lists all users with access to the record and their access rights.

Show deactivated users

Show involvements on the record with influence on access conditions

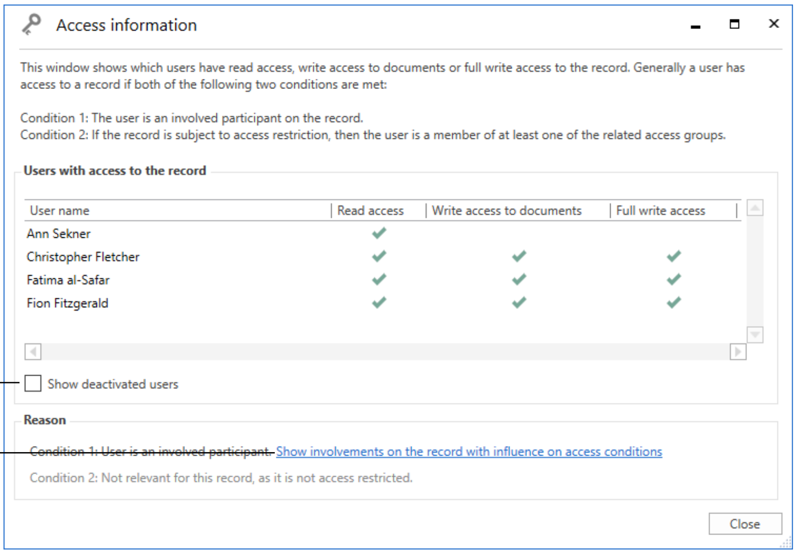


Figure 137: The "Access information" dialogue

Tick the box next to "Show deactivated users" to include these in the list of users with access to the record.

To see further details about users' access conditions, click **Show involvements on the record with influence on access conditions**, which opens the following dialogue.

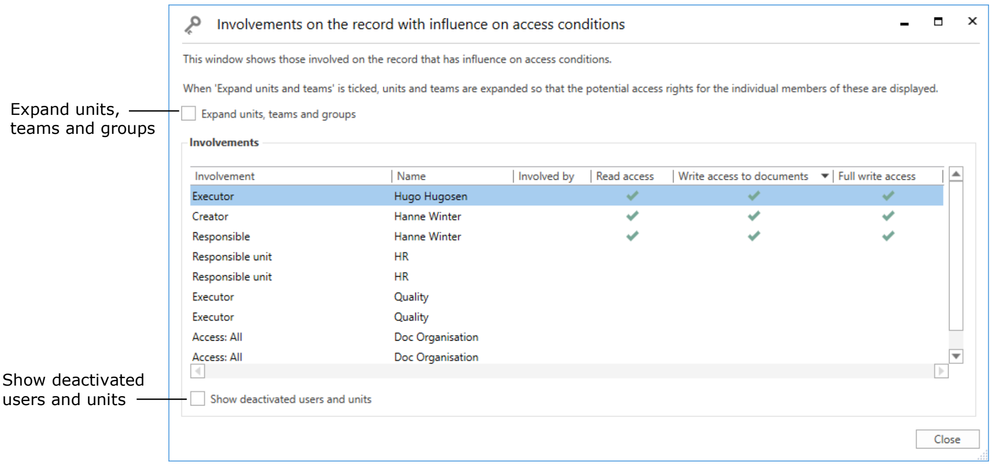


Figure 138: Influence on access conditions

This dialogue shows which users have read access, which have write access to documents, and which have full write access. If a unit or team has any influence on the access condition, users who are a part thereof may be seen by ticking the "Expand units, teams and groups" box. It is also possible to view deactivated users and units in this dialogue by ticking the box below the list.

The unit casework line

When a record is sent to one or more users or units using the **Send** function, it is possible to follow the recipients' processing of the record. This is done using the "Unit casework line", which is used in cases of formal enquiries that require a reply from the recipient, e.g. a record sent to the legal department in connection with a hearing.

To enable this line, go to the "Advanced" tab and tick the field "Unit casework line" before sending the record.

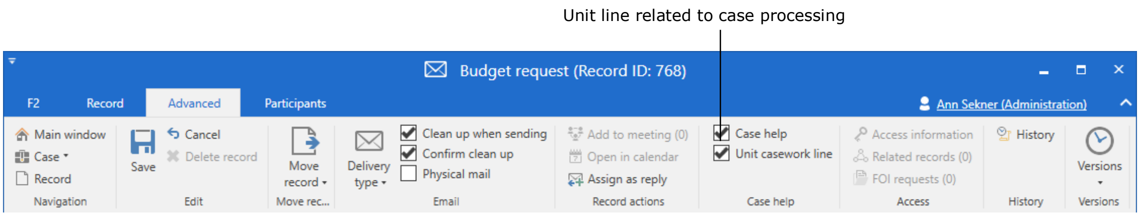


Figure 139: Add "Unit casework" line

This creates a new group of fields on the record, "Unit casework", when it has been sent. A "unit casework" line is added for each recipient when a record is sent to multiple users or units.

Figure 140: The unit casework line

When the email record is received, the recipient user or unit can use the line in their work. A deadline and a responsible user can be assigned using the unit line. The formal responsibility for the record remains with the sender; however, with the “Unit casework” line, the recipient may delegate the responsibility for the record to another user within the same unit.

Information regarding the recipient unit’s management of the record is shared with all users with access to it. This allows the sender to keep track of the recipient's work and for example see:

- Whether the receiving unit and its responsible user have seen it.
- Whether the responsibility for a record has been delegated to a certain user.
- The status of the record.
- Whether the receiving unit has assigned an internal deadline to the record.

Each field is described in the following sections.

If necessary, recipients of emails without the unit casework line can add the line themselves. This is done by clicking on **Show all fields** in the record window’s ribbon, selecting **Extended**, and then clicking on the **Unit casework** in the bottom left-hand corner as shown below.

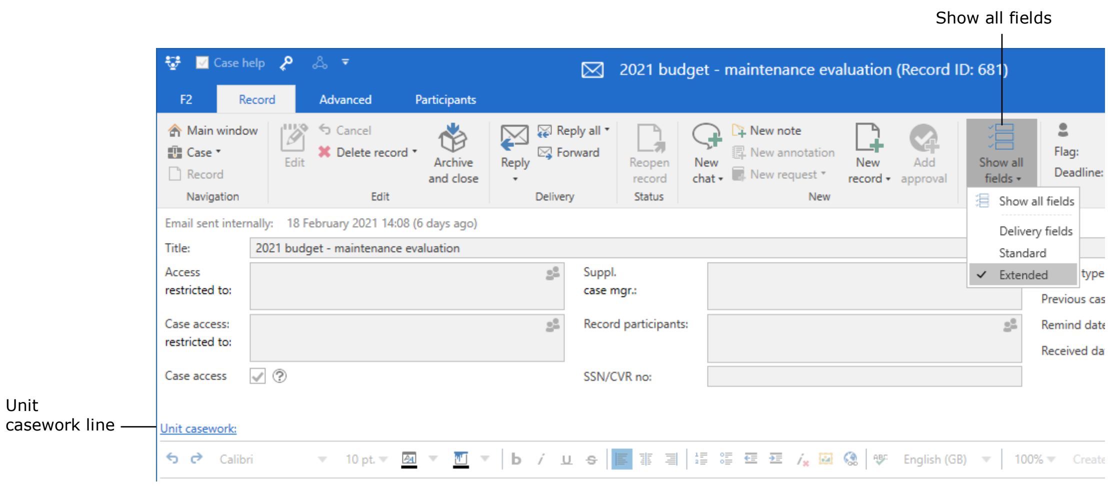


Figure 141: Add the unit casework line on a received email

This adds the unit casework line, as illustrated below.

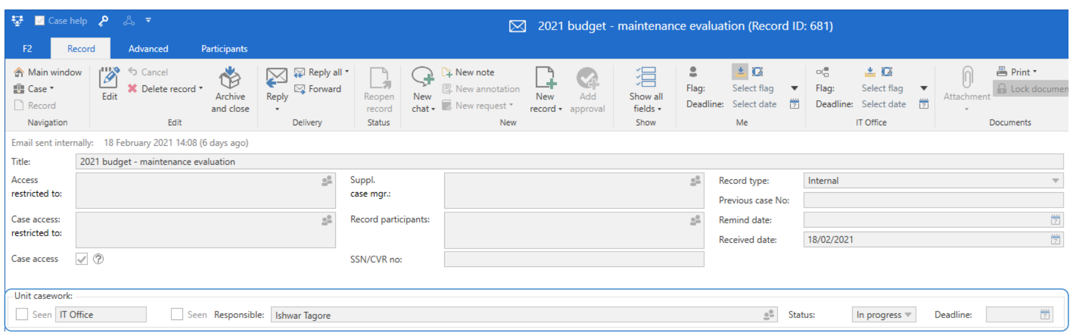


Figure 142: Recipient unit’s casework line

If a user adds the unit casework line on a record received in their inbox, F2 automatically allocates the responsibility for the record to this user. The following section describes the field in further detail.

The unit casework line's "Seen", "Recipient", and "Responsible" fields

"Unit casework" contains two sets of fields indicating who has seen the record: one set for the recipient and one for the user to whom the responsibility has been allocated.

The first "Seen" field, followed by a field with the recipient unit's name, indicates whether a user in that unit has seen the record. The second "Seen" field, which is followed by a "Responsible" field, indicates whether the responsible user has seen the record.

Even though a record has been sent to a specific user in a unit, only the recipient unit is shown until a user has actively seen the record. This is because all users in the unit can see the record and it may be a different user than the intended recipient who processes the record.

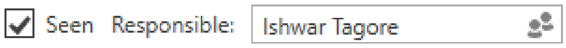


Figure 143: The "Seen" and "Responsible" fields

When a user opens the record and clicks on **Edit,** e.g. to reallocate responsibility or add their own deadline (see below), F2 automatically ticks the "Seen" field and designates that user as "Responsible". If the user reallocates responsibility after this, F2 removes the tick in the relevant "Seen" field.

This allows the sender to monitor on the record when it has been received by the unit and whether it will be processed by the user to whom it was sent or by another user in the unit.

However, the recipient can open the record to view it and untick the "Seen" field in case they cannot process it immediately.

Using the "Responsible" field, the responsibility for the record can be allocated to a user in the unit. It is not possible to allocate the responsibility for the record to a user outside the unit. When a user is specified in the "Responsible" field, the record is placed in the inbox of that user, notifying them of the reallocation of responsibility.

The "Status" field on the unit casework line

The recipient updates the status field to inform the sender whether work on the record is "Completed" or still "In progress". This lets the sender of the record follow its status and its progress.

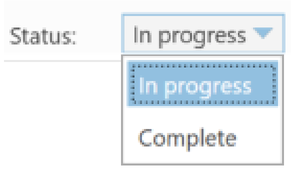


Figure 144: The "Status" field on the unit casework line

The "Deadline" field on the unit casework line

The recipient may add their own deadline to inform the sender when action on the record is expected. This lets the sender keep track of the recipients' internal deadlines for processing the record.

Add a deadline to the record by clicking the calendar icon or by entering the date in the "Deadline" field.

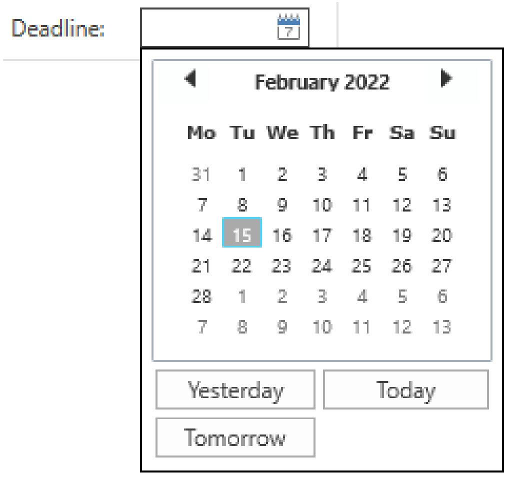


Figure 145: The "Deadline" field on the unit casework line

The deadline may also be set by entering e.g. "+10", (i.e. 10 days from today), in which case F2 automatically fills in the date when the user leaves the field.

History

When a record is edited, F2 adds a description of the activity to the record history.

Click **History** to see a list of all activity on the record. The record history can be filtered by either record changes, documents, or metadata using the filter fields below the column titles. F2 starts filtering the list when the user enters text or makes a selection from the filter's drop-down menu.

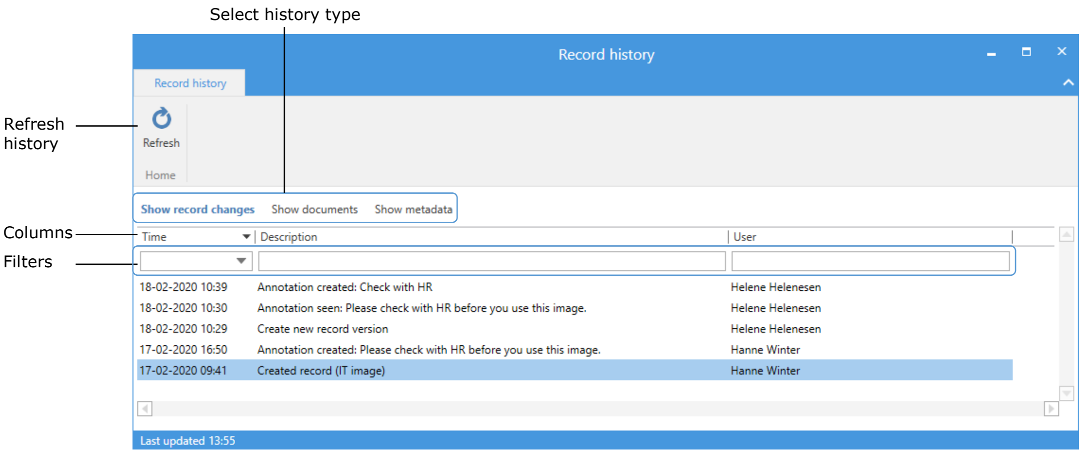


Figure 146: The "Record history" dialogue

The dialogue can be kept open while working in F2. Click **Refresh** to update the list of actions on the record.

The record history is divided into three tabs which are described in the following sections.

Show record changes

Click **Show Record changes** to display information about changes on the record, including creation time and date and selected metadata.

Figure 147: History: Record changes

Show documents

Click **Show documents** to display information about changes to the record's attached documents, including creation time. The record document is included in this list.

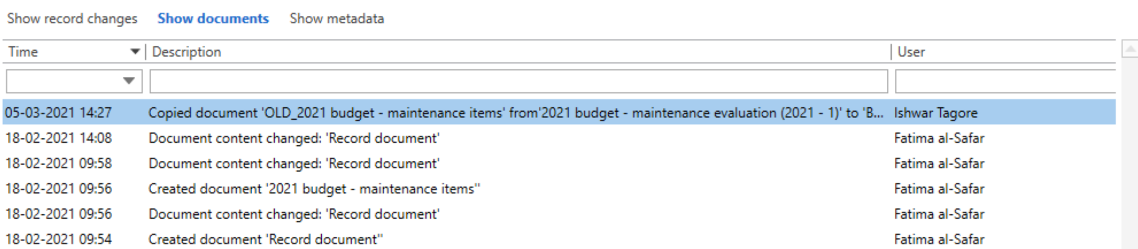
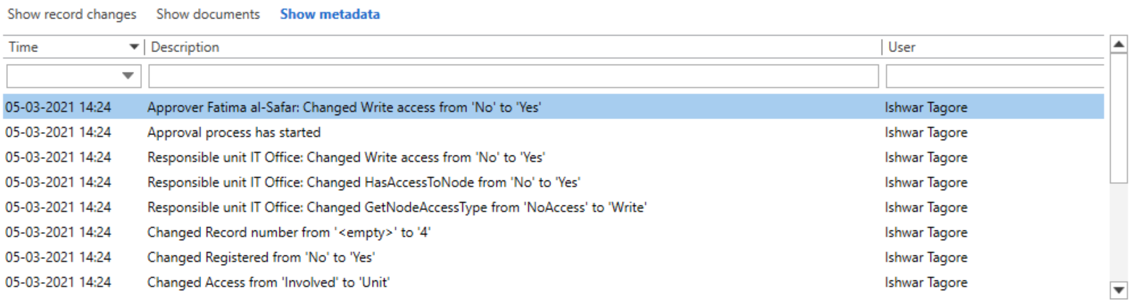


Figure 148: History: Record documents

Show metadata

Click **Show metadata** to display information about changes to the record's metadata, including notes, approvals, and requests.



Time	Description	User
05-03-2021 14:24	Approver Fatima al-Safar: Changed Write access from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Approval process has started	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed Write access from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed HasAccessToNode from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed GetNodeAccessType from 'NoAccess' to 'Write'	Ishwar Tagore
05-03-2021 14:24	Changed Record number from '<empty>' to '4'	Ishwar Tagore
05-03-2021 14:24	Changed Registered from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Changed Access from 'Involved' to 'Unit'	Ishwar Tagore

Figure 149: History: Record metadata

Versioning

Versioning of records is managed by F2. A record and its attachments only appear once in F2. When a new version of a record is made, all users will see the newest version only.

It is possible to check the record's version number and each version's creation date and, if the user has at least write access to the record's documents, make an earlier version active again. F2 retains all previous versions of the record, and they can be accessed from the record window.

Versioning is described in further detail below.

Creating a new version of a record

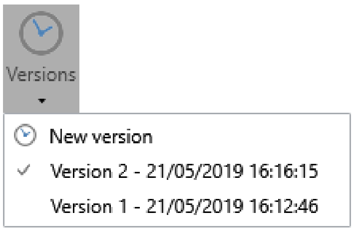


Figure 150: New version

To create a new version of a record, go to the "Advanced" tab, open "Versions" drop-down menu, and click **New version**.

Sometimes F2 creates a new record version automatically. This happens when the case number on the record is changed, i.e. when a record is moved from one case to another. The new record version is created before any other changes are saved.

In certain instances, F2 suggests creating a new record version. This happens e.g. when a user saves a record's attachments who were previously edited by someone else. A dialogue is shown from which the user may choose to let F2 create a new version.

Note: If a user makes several successive document changes, F2 only asks to create a new version once.

Previous versions

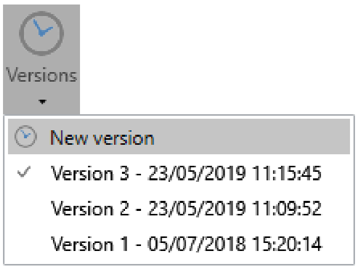


Figure 151: Select previous version

A list of previous record versions can be found on the record window's "Advanced" tab. Click the drop-down arrow on the menu item "Versions". Each version is assigned a number, with the highest being the most recent version of the record.

By default, users are shown the most recent version of the record. To see a previous version, click on it in the list. For further information, see *Versions and access*.

F2 will then open the previous version of the record, and a purple bar above the record metadata shows that it is version x of y.

This means that a user can always access previous versions of a record and its attachments in F2 regardless of any changes and edits. Note that old versions of chats, notes, and requests are not retained. These can only be seen on the active version.

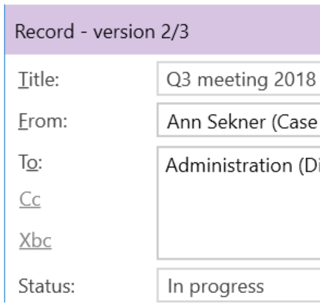


Figure 152: Version 2 of 3

Note: The record must be in read-only mode for the "Versions" drop-down menu to be active.

A previous version of the record cannot be edited, but the user may make a copy of the record in the desired version and continue working with this version in a new record.

A previous version of the record can be set as the active version.

When a previous version of the record has been selected in read-only mode, click **Make version X the active version**.

F2 then creates a new version of the record based on the currently selected older version. In the example on the figure to the right, version 2 would be the basis for a newly created version 4.

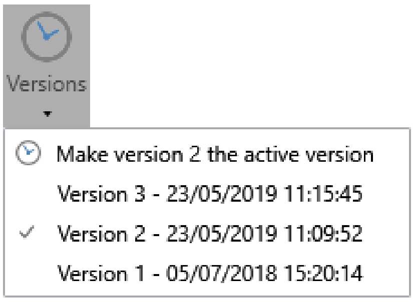


Figure 153: Make current version the active version

Creating a new record version from e.g. version 2 means that attachments added in later versions are removed and changes to the record document or metadata after version 2 are reverted.

Note: Only the active version of a record can be edited.

Versions and access

The "Access" value on the newest version of a record determines whether it is accessible to a user.

The record's access level is retained when a new version is created.

For example:

Three versions of a record exist. All have the same case manager and responsible unit, but version 1's access level is "Involved", version 2's is "Unit", and version 3's is "All".

Because the newest version of the record has the access level "All", all users have at least read access to version 3. The responsible case manager and other involved users can access all three versions (by accessing them from the "Versions" menu item). Users in the responsible unit can only access versions 2 and 3, while users outside of the responsible unit can only access version 3.

A similar principle applies to the "Suppl. case mgr." field. A supplementary case manager with full write access cannot accidentally restrict their own access rights. If the supplementary manager reverts the record to a previous version to which they previously only had read access, they keep their full write access from the current record version.

Access restrictions on a record also affect uses' access to a given record version.

For example:

Two versions of a record exist, both with the same responsible user and access level "All". In version 1 the responsible user's unit is added to the "Access restricted to" field. This means that users outside of this unit are only able to access version 2.

Menu items of the “Participants” tab

The “Participants” tab shows a list of participants involved on the record.

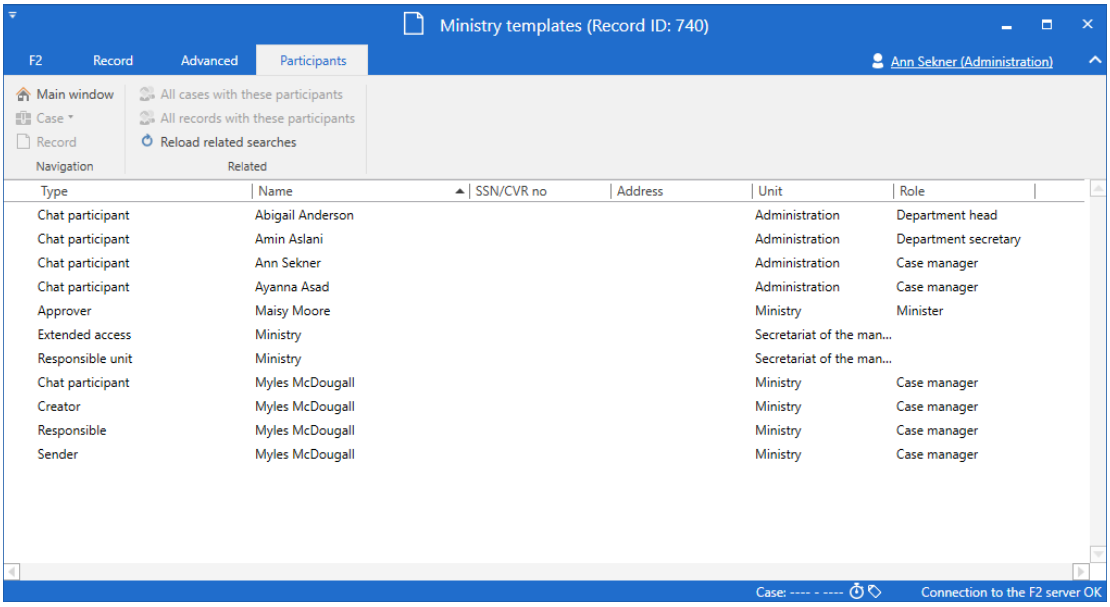


Figure 154: The “Participants” tab in the record window

Note: F2’s participant register can also be accessed by clicking the participant icon above the search lists to the left of the main window or by using the keyboard shortcut **Ctrl+K**. For further information, see *F2 Desktop – Searches*.

It is possible to edit the list view. Right-click a column in the list, then click **Columns** in the context menu.

The “Select columns” dialogue opens. From here, it is possible to add or remove columns.

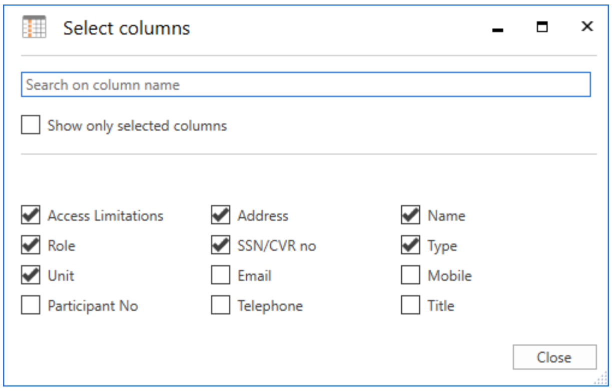
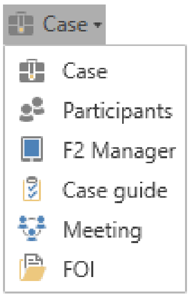


Figure 155: Select columns on the “Participants” tab

Right-click a participant in the list to perform a related search and view which participants are involved on which records and cases. For further information, see the *F2 Desktop – Searches* manual.

Menu items for working with the record participants can be found on the “Participants” ribbon. These items are described below.

Menu item	Description
Main window Case Record	Navigate between the main and case windows by clicking one of them. By clicking the drop-down arrow next to "Case", it is possible to navigate to the case tabs "Case" and "Participants". If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under **Case** as shown below.  **Figure 156: Drop-down menu for "Case"** It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode. The "Record" menu item is only active in the main or case window.
All cases with these participants	This menu item is active when the user selects a participant from the list. Clicking **All cases with these participants** opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.
All records with these participants	This menu item is active when the user selects a participant from the list. Clicking **All records with these participants** opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.
Reload related searches	Click **Reload related searches** to update the search options added with the add-on module F2 Related Searches. If a user with the "Related searches editor" privilege has created a new related search option, click **Reload related searches** to make the search option available without restarting F2.

Menu item	Description
	Note: Changes to a related search option from the F2 Related Searches add-on module are applied immediately if a user clicks **Reload related searches** as described above. They are otherwise applied upon the next F2 startup. For further information on related searches, see the *F2 Desktop – Searches* manual.

Configuration options

There are certain configuration options available in connection with records and communication. In cooperation with cBrain, these can be implemented to fit each organisation and its work processes. These options apply to the entire F2 installation:

- The option of displaying the record document and HTML attachments in compatibility mode by right-clicking in the document. Useful for emails that are displayed incorrectly. Note that in this mode, the spell check is deactivated. By default, this is deactivated.
- The option of automatic deletion of chats after a certain number of days without new messages. A number of days, e.g. 30 or 60, is selected. It is also possible to decide if new chats are automatically marked for deletion.
- The option of F2 suggesting another location than "External participants" when creating a new participant.
- The option of configuring the default access level for imported emails to "Unit" instead of "Involved".
- The option of applying the access level from the original record when a reply record or a forwarded record is created.
- The option of marking records in connection with customer-specific integrations. Requires F2 External Access (add-on module).
- The option of adjusting the time period in which a record is kept in "My deleted records" before final deletion.
- The option of enabling better suggestions for the "Case", "Record participants", "To", "Cc", and "Xbc" fields in the record window and the "Add participants" field in the chat window.
- The option of adding spell check for multiple languages in the record and approval documents as well as the dialogues for reminders and system messages.
- The option of using "Send secured" when sending emails to external participants.

List of Figures