



# **F2 Desktop**

## Searches

Version 8

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# Welcome to cBrain F2

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

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

## Reading instructions

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

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

1. The Main Window
2. [Searches](#)
3. Settings and Setup
4. Records and Communication
5. Cases
6. Management and Organisation

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

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

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

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

## Additional documentation for F2 Desktop

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

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

## **F2 add-on modules**

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

Examples of cBrain's add-on modules include:

- F2 Merge Codes, which enables the merging data from F2 to templates. The module enhances document quality through the use of merge fields utilising metadata and information from the participant register.
- F2 Approvals, which facilitates the handling of simple and complex approval processes. The module helps 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.

## Searches in F2

Fundamentally, F2 offers its users two different search options. The first is the possibility to perform searches in the F2 Desktop client, and the second is using the add-on module cSearch. This manual will describe the first option – searches performed in the F2 Desktop client. The latter option is described in *F2 cSearch – User manual*.

In F2 all users work in one shared archive. All emails to and from users, documents from the shared drives of the organisation, from user PCs, etc. are gathered here. This means that all information in F2 exists in one place only – the “Archive”. For this reason, F2 uses the “Archive” as a starting point when performing a search.

Lists and folders in F2 are all part of the “Archive”. A user can search in any of the lists or folders displayed on the left side of the main window. The user only needs to go to the desired list and perform a search.

The search results are confined to items (e.g. records or cases) from the chosen list. Additionally, users will only be able to see records and cases to which they have access. The number of search results displayed depends on each user’s setup. In the “Setup” dialogue on the “Settings” tab the user can determine the number of search results displayed by F2. For further information, see *F2 Desktop – Settings and Setup*.

The easiest way to perform a search in F2 is by using the free-text search field. To ensure that a search is precise, it is possible to use search operators and specific metadata criteria. The various search options are described in the following sections.

### Free-text search

By default, a free-text search searches in all the records that the user has access to. The searchable text consists of:

- Documents
  - Content
  - Title
  - External ID
- Participants
  - Email address
  - Name
  - Unit
  - Role
- Annotations
  - Annotation text
- The record itself
  - Record ID
  - Title

- Keywords
- Searchable extended data (requires a special setup)
- The case the record is attached to
  - Title
  - Keywords
  - Progress code
  - Searchable extended data (requires a special setup)
- Chats and notes on the record where the user is a participant
  - Text
  - Title.

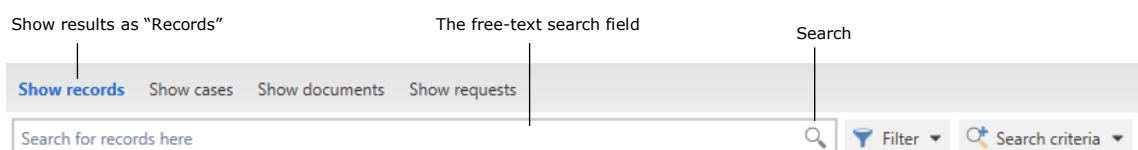
The free-text search field is located above the result list in the main window.

All searches are made from a specified list. Select a list on the left side of the main window by clicking on it and enter a search string in the search field. The search is executed by pressing **Enter** or by clicking on the **magnifying glass**. If the user has selected the "Archive" list, the search will be performed throughout the entire archive. If the user selects another list, e.g. "My inbox" or "My archive", the search will be performed only within the boundaries of that specific list.

Deleted and private records are not included in the "Archive". If the user wants to "Search all over", which is the bottom option in the "Misc." node on the left side of the main window, the search will cover not only the "Archive", but also "My private records" and "My deleted records".

The various lists and their contents are described in detail in *F2 Desktop – The Main Window*.

When the user enters a search string in the free-text search field and then presses **Enter** or clicks the **magnifying glass**, F2 will search for the string in the content of records, cases, metadata and attached documents. To the right of the free-text search field are the **Filter** and **Search criteria** buttons. These are described in the sections *The "Filter" button* and *The "Search criteria" button*.



**Figure 1: The free-text search field**

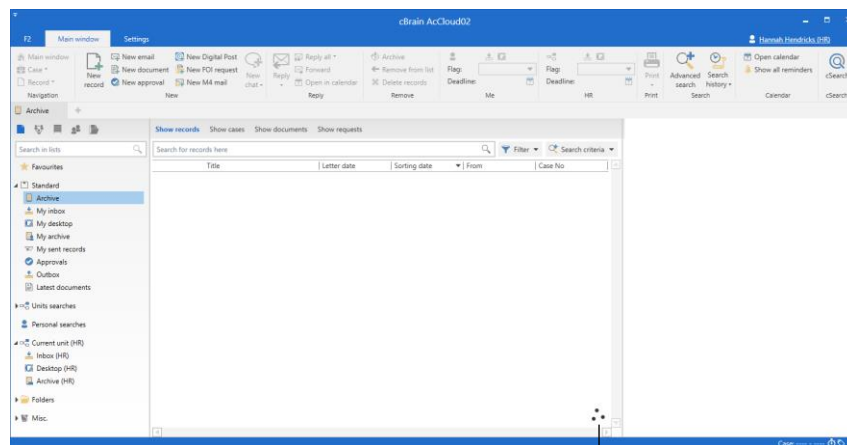
Searches performed with the free-text search field search for complete words as a standard. For example, if the user enters the word "day" in the free-text search field and presses **Enter** or clicks on **Search**, F2 automatically adds a space after the search word. This means that F2 searches for results that contain the specific word but not variations like "days" or "daytime".

It is possible to search for a word that starts with "day" by adding an asterisk after the search word ("day\*"). F2 then searches for results containing "day", and results that start with "day" such as "daytime".

If multiple words are entered, e.g. *department head*, F2 will search for both words and include results in which both words appear.

F2 does not distinguish between upper- and lowercase letters.

When performing a search using the free-text search field in the main or case window, three dots appear in the bottom right corner indicating that a search is in progress.



A search is in progress

**Figure 2: Search performed in the "Archive"**

When a search is performed in the main window, the loading of records in lists is staggered. This means the first search results are available quickly and the user can begin working, while the remaining results load in the background.

The number of records can be adjusted in cooperation with cBrain.

## Search with filtering

The free-text search field may also be used to filter a list of search results, which is useful for narrowing down a search with many results. Filtering does not start a new search, but filters an existing one. This means that filtering can also be used in saved lists that contain a large volume of records or cases.

When a search has been performed, the user can filter the results by typing a search string into the free-text search field. F2 then starts showing results in which the string appears.

F2 performs a fresh search with the chosen criteria when the user presses **Enter** or clicks on the **magnifying glass icon**.

Filtering can be disabled in the main window on the "Settings" tab. Click the **Setup** menu item, and select the "General" tab in the dialogue that opens. Here, the user



can choose between “Search with filtering” and “Standard search”. A standard search requires the user to press **Enter** or click on the search icon to search.

### The “Filter” button

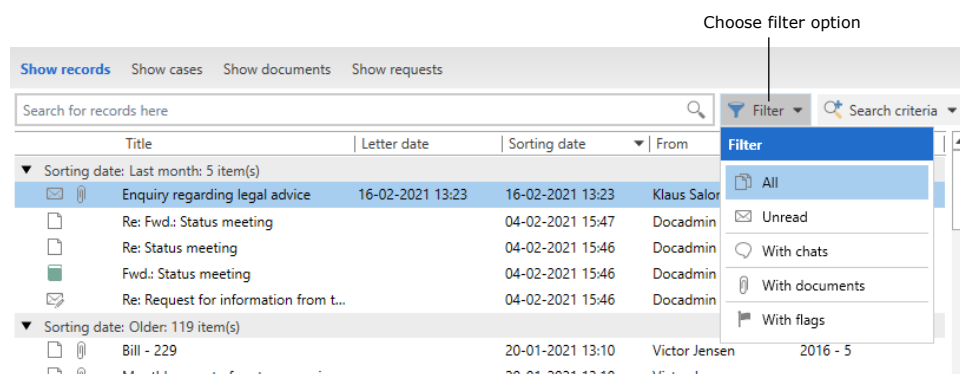
The **Filter** button is located on the right side of the main window free-text search field.



**Figure 3: The main window “Filter” button**






Additional filters that can be used in the result list are “All”, “Unread”, “With chats”, “With documents”, and “With flags” as shown below. The filters can only be used when the result list shows records or cases. These filters along with the “Match” filter are available when viewing the result list as cases. For more information, see the *Show cases* section.

Click **Filter** to view the filter options in a drop-down menu. See the figure below.



**Figure 4: Filter options in the result list**

The table below describes each search filter option.

Filter	Description
 All	Default view that shows all results from the search.
 Unread	Shows unread search results.
 With chats	Shows records with chats.
 With documents	Shows search results with documents attached.
 With flags	Shows search results marked with a flag.

## The "Search criteria" button

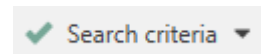
The **Search criteria** button is located on the right side of the main window free-text search field, next to the **Filter** button.



**Figure 5: The main window "Search criteria" button**

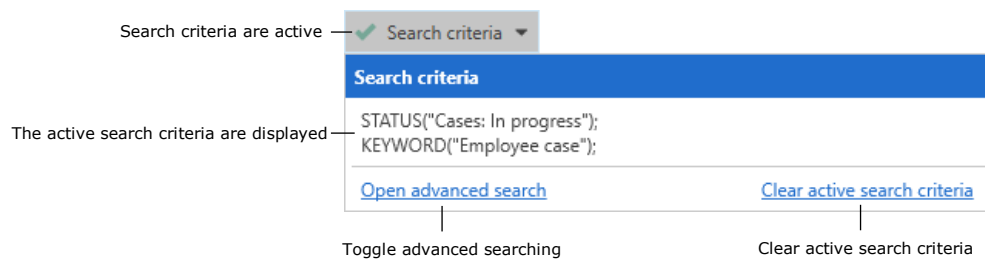
Whenever any search criteria are active, the magnifying glass icon is changed to a green checkmark.

This makes it possible to see if any advanced search criteria are active, even if advanced search is not. Read more about advanced searching in the *Advanced searches* section.



**Figure 6: Search criteria are active**

Click **Search criteria** to open a tooltip with all active search criteria.



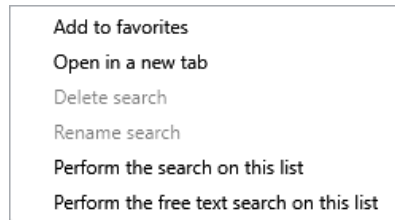
**Figure 7: The "Search criteria" tooltip**

The tooltip also supports navigating to the advanced search or resetting the active search by clicking **Clear active search criteria**. Resetting the search means all active search criteria are removed except those inherent to the list that the search is based on.

## Perform the search on this list

After performing a search on a list, the user can perform a search with the same criteria on another list without selecting it. Right-click on a list, e.g. the "Archive" (without left-clicking on it first), and select **Perform the search on this list** in the context menu. Note that the search criteria will be lost if the new list is selected before right-clicking.

The function **Perform the search on this list** can only be used with standard lists such as "My Inbox" or "Archive (HR)".



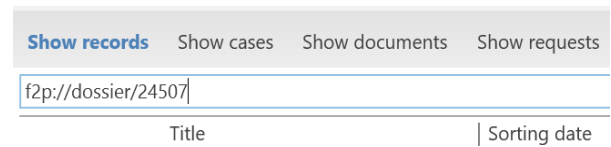
**Figure 8: “Perform the search on this list” in the context menu**

From the context menu, the user also has the option to search another list for only the text from the free-text search field, **Perform the free text search on this list**. This search applies the current content in the free-text search field to the list on which the user has right-clicked. Note that the search criteria will be lost if the new list is selected before right-clicking.

### Using f2p links in the free-text search field

F2p links can be used in the free-text search field. F2p links are links created in F2 that lead directly to either a record, case, or document. An f2p link is created using the menu items **Copy link to record**, **Copy link to case**, or **Copy link to document**. Read more about these in *F2 Desktop – Records and Communication*.

Insert an f2p link in the free-text search field either by using the context menu or the shortcut **Ctrl+V**. Press **Enter** to open the record or case directly.



**Figure 9: An example of an f2p link**

**Note:** Since an f2p link refers to a certain record, case, or document, it will always be the element in question that is opened regardless of what the result list is set to display.

### Search using operators

Performing a free-text search can yield an extensive list of results. Using operators may help narrow down the results.

Operators can be used in both free-text searches and when searching via search fields. For further information on search fields, see *Advanced searches*.

The following operators are available in F2:

- Asterisk (\*)
- AND
- OR
- NOT
- Quotation marks (" ")

F2 regards the list above solely as operators. It is not possible to perform searches that consist only of these symbols/words as they are used for defining a search. In other words, \*, AND, OR, NOT and "" cannot be used as search strings.

It is possible to combine several operators in one search.

### **Search using \***

The user can enter a search string followed by \* to search for words in which that string is included. If *day\** is typed into the search field, all records in the chosen list whose content, title, or case title contain words that begin with *day* (e.g. *days* or *daytime*) will appear in the result list.

Strings written in a search field without the asterisk (\*) are perceived as whole words. For example, if the user types *day* in a search field, any records that contain the word *day* are found, but not records that, for example, contain the word *days*.

**Note:** It is only possible to use one asterisk per search word. If two asterisks are inserted in a word (e.g. *r\*le\**), F2 will perceive it as two words and search for results that contain words starting with "r". This will usually result in F2 not responding, as searches for only one letter yields too many results.

### **Search using AND**

Typing *AND* between two search words will search for records that contain both words. This means that typing *minister AND department* only yields results containing both "minister" and "department".

If the user searches for two words separated by a space, the search will be carried out as if there were an *AND* between the words. *AND* is thus the implicit operator between two words when nothing else is specified.

### **Search using OR**

Typing *OR* between two search words will search for records containing either word. This means that entering *minister OR department* will find all records containing either *minister* or *department*.

Using *OR*, F2 will also search for records whose content, record title, or case title contains both search words.

### **Search using NOT**

The *NOT* operator is for searches in which a user needs results whose content or title contain search word A, but exclude search word B. This can be done by entering *[search word A] NOT [search word B]*.

For example, searching for *ministry 2012 NOT department* will return all items in the selected list whose content, title or case title contain both the words "ministry" and "2012". It will exclude results containing the word "department".

It is not possible to perform a search that contains only "NOT" followed by a word. The reason is that the database has to generate a positive search list before it can remove records which do not contain the term specified after "NOT".

## Search using quotation marks ""

If a word combination is put in quotation marks (""), for example "Mary Smith", F2 will search for this exact search string. This means that items containing "Mary Jane Smith", "Mary and John Smith", etc. will not appear in the result list.

## Search using parentheses

Search words are grouped by using parentheses. For example, a search for "meeting" AND "agenda" OR "participants" will give results that contain either the two words "meeting" and "agenda" or results containing the word "participants". The search can be more precise by adding parentheses around some of the search words. For example, a search for "meeting" AND ("agenda" OR "participants") will give results containing both "meeting" and "agenda", along with results containing "meeting" and "participants".

## Stop words configuration

A function called "Stop words" can be applied to searches. This is done in cooperation with cBrain. Stop words are words, symbols, etc. that should NOT be included in free-text searches.

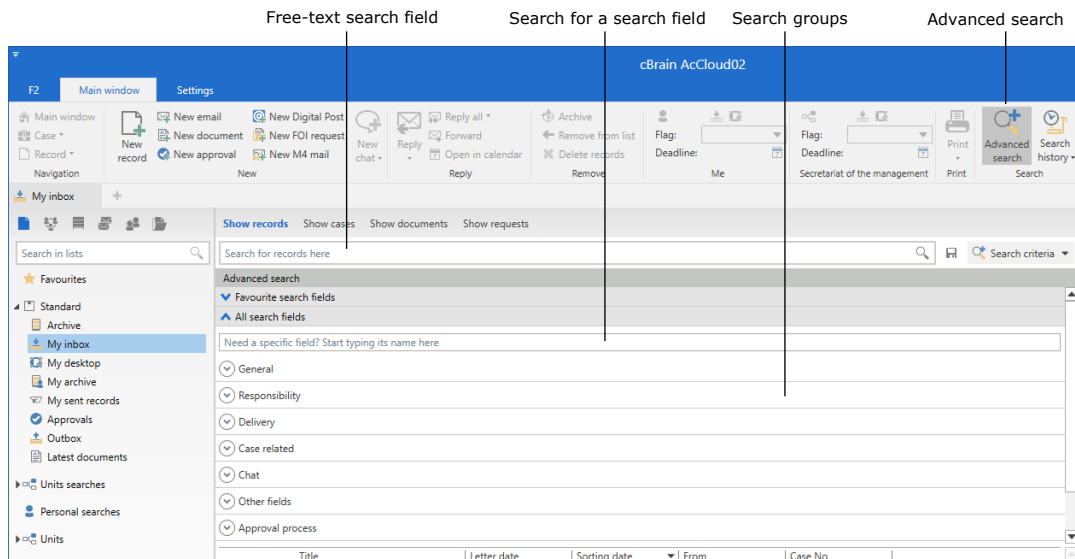
These include common words such as "and", "but" or "for". If the user enters a stop word in a search or metadata field while the "Stop words" function is active, no results will be displayed.

## Advanced searches

A search using the free-text search field is often a very broad search. F2 offers to search for specific metadata. This is an advanced search.

The advanced search can be accessed via the **Advanced search** menu item in the main window ribbon. Using the metadata fields of the advanced search, users are able to specify various search criteria. **Advanced search** also contains the **Save search** option, which is described in the *Saving a search* section.

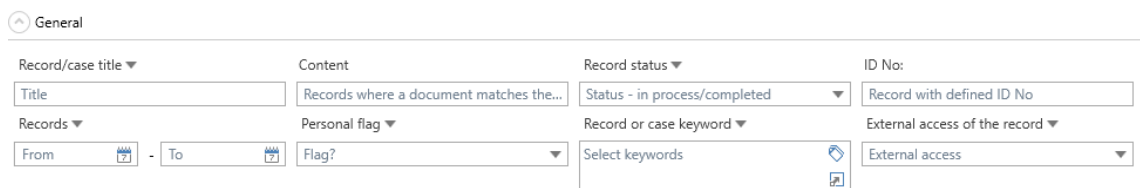
Click on **Advanced search** in the main window ribbon to display the groups of search fields.



**Figure 10: Advanced search**

It is possible to search for a specific search field by entering a search string in the field above the search groups. F2 will then show all search fields in which the search string appears. Pressing **Enter** is not required.

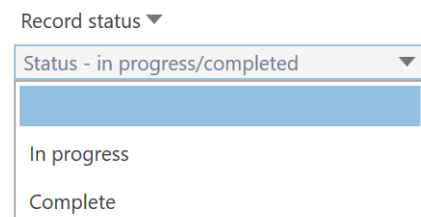
The search fields are divided into groups. Click on a search group to expand it and view its search fields. See the figure below.



**Figure 11: The "General" search group**

A field with a drop-down arrow ▼ next to its title allows the user to choose between certain values.



For example, under "Record status" the user can choose whether to search for records with the status "In progress" or "Complete". The search field can also be left empty.



**Figure 12: Search options for the "Record status" field**

A search for a user or unit can be performed in the following ways:

- By typing the name of the user or unit in the search field.

- By clicking on the  icon in certain search fields to find the user in F2’s “Participant register”.
- By clicking on the  icon in certain search fields to find the unit in F2’s “Participant register”.

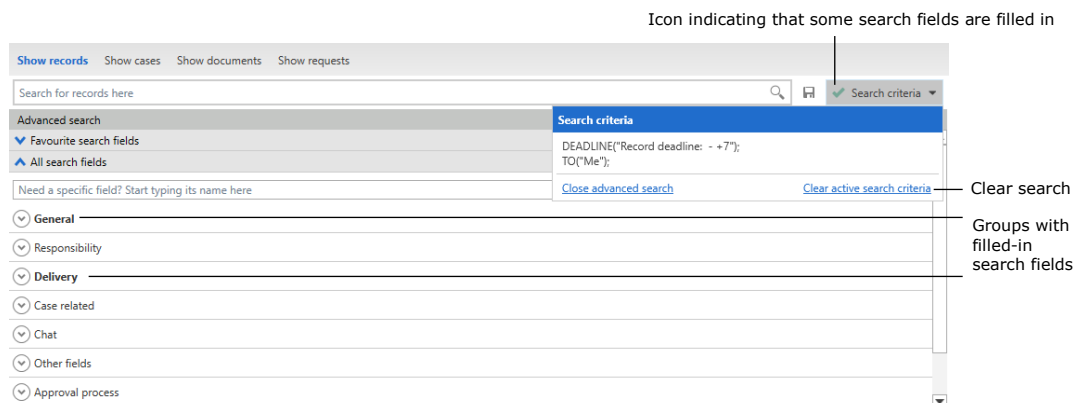
Read more about searching for participants in the *Search for participants* section.

When the desired fields in one or more search groups are filled in, click the **magnifying glass** next to the free-text search field or press **Enter** to display the results of the search.

**Note:** It is important to delete previously defined searches from the search fields before a search is performed. This can be done by clicking the drop-down arrow by **Search criteria** and then **Clear search criteria**.

### Filled-in search fields are highlighted

If one or more fields in a search group is filled in, the group’s title will be bolded. This makes it easier to determine which fields are filled in when the groups are collapsed.



**Figure 13: Search field groups**

The **Search criteria** icon is a green checkmark if any search fields are filled in. The button is described in the section *The “Search criteria” button*. The visual information of **Search criteria** makes it possible to see if any search fields are filled in even when they are hidden by deselecting **Advanced search** in the ribbon. Clicking on **Advanced search** displays the search fields once more. Entered search strings can be removed by clicking **Clear active search criteria**.

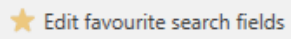
### Search groups

The metadata search fields are divided into groups. The number of groups may vary according to add-on modules to the F2 installation.

The user can perform searches with operators in the search fields. For more information on the available search operators, refer to the *Search using operators* section.

The metadata fields of each group are presented below.

## The “Favourites” search group

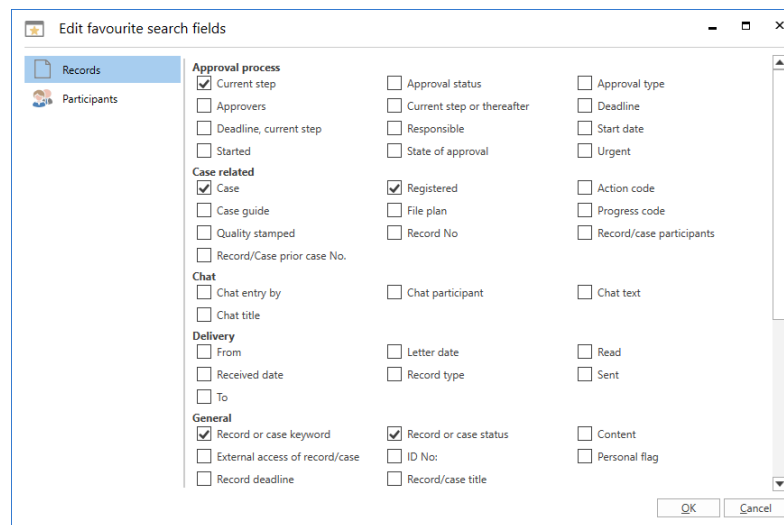


Users can create a search group with their personal favourite search fields.

**Figure 14: Menu item “Edit favourite search fields”**

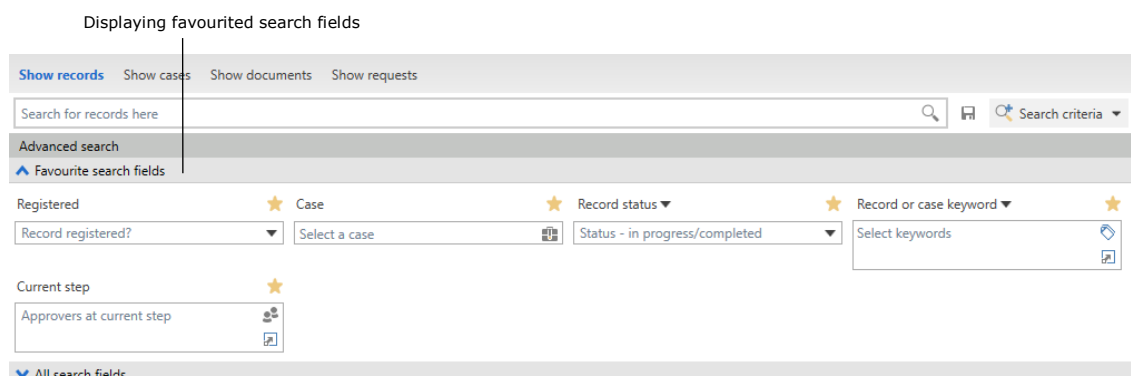
This is done in the main window ribbon by clicking on **Edit favourite search fields**.

A dialogue with a wide range of predefined search fields will open. Click on **Records** on the left side of the dialogue. Tick off fields to add them to the favourite search group as shown below.



**Figure 15: “Edit favourite search fields”**

The ticked-off search fields are now included in the “Favourites” search group as shown in the example below.



**Figure 16: Example of the “Favourites” search group**

The user can also add search fields to favourites when viewing a search group. To do this, hover the cursor over a search field to make a grey star appear. Click on



the **star** to add that search field to favourites. The star turns yellow. Click the **star** again to remove the search field from "Favourite search fields".

### The "General" search group

Search field	Possible values	Description
"Record/case title"/ "Record title"/"Case title"/"Current record title"	Search string	<p>A search is performed for records or cases whose title contains the search string.</p> <p>"Record/case title":</p> <ul style="list-style-type: none"> <li>• Search for the current record or case title.</li> <li>• For email records, F2 searches both for the original title and the new title, if any.</li> </ul> <p>The search result will display the current title of the email record.</p> <p>"Record title":</p> <ul style="list-style-type: none"> <li>• Search for the current record title.</li> <li>• For email records, F2 searches both for the original title and the new title, if any.</li> </ul> <p>The search result will display the current title of the email record.</p> <p>"Case title":</p> <ul style="list-style-type: none"> <li>• Search for the case title.</li> </ul> <p>"Current record title":</p> <ul style="list-style-type: none"> <li>• Search for the record's current title only.</li> </ul>

Search field	Possible values	Description
		<p><b>Note:</b> The search field "Current record title" is only displayed if it has been enabled in cooperation with cBrain.</p>
"Content"	Search string	Search for records with attachments whose content matches the search string.
"ID No"	Number	Search for records with a specific ID number.
"Record or case status"/"Record status"/"Case status"	In progress/ Complete	Search for records based on whether they are in progress or completed.
"Records"/"Mine"/ "Unit:"/"Deadline, case handling"/"Cases"/ "Records and cases"	<p>Date or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined.</i></p> <p>It is also possible to use + and -.</p> <p>Searches for records with the specified deadline specified in the input field.</p> <p>Dynamic searches.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	<p>Records and/or cases whose deadline is within the specified interval.</p> <p>Records and/or cases with the user's personal deadline within the specified interval.</p> <p>Records and/or cases with the unit's case management within the specified interval.</p> <p>Records and/or cases with the unit's deadline within the specified interval.</p>
"Personal flag"/"Unit flag"	Flags, a value list managed by an administrator.	Search for records with the specified flag.
"Record or case keyword"/"Record keyword"/"Case record"	<p>A certain keyword.</p> <p>A keyword within a specific subject.</p>	Search for keyword(s) specified on the record or case. Makes it possible to create lists

Search field	Possible values	Description
	A keyword or subject which contains a specific text.	based on a certain keyword.
"External access of the record/case"/ "External access of the record"/ "External access of the case" (add-on)	Undefined/Open/ Partly open/Closed	Search for records shared with external parties via the add-on module "F2 External access".

### The "Responsibility" search group

Search field	Possible values	Description
"Record/case responsible"/ "Record responsible"/"Case responsible"	User/Unit/Me/My unit	Search for records or cases for which the specified user or unit is responsible.  Entering "Me" performs a search for the current F2 user.  If the responsible part is set to "Me" and this search is made available to several users, F2 identifies "Me" as the user performing the search.
"Seen"	Yes/No	Search for records marked as seen on the "Unit registration line".
"Unit responsible for case/record"/ "Unit responsible for record"/"Unit responsible for case"	Responsible unit/My unit	Search for records/cases for which the specified unit is responsible.  <i>My unit</i> is the unit to which the current user belongs.
"Record/Case suppl. case mgr."/"Record suppl. case mgr."/"Case suppl. case mgr."	User/Me	Search for records/cases for which the specified user is set as supplementary case manager.  This option can be used for finding records for

Search field	Possible values	Description
		<p>which the user is supplementary case manager and for records on whose case the user is supplementary case manager. It is possible to search for either one of the options or for both.</p>
<p>“Record/case suppl. units”/“Record suppl. units”/“Case suppl. units”</p>	<p>Unit/My unit</p>	<p>Works as the preceding search, except this search is for records and cases for which a unit is set as supplementary case manager.</p>
<p>“Case work”</p>	<p>User/Unit/Me/My unit</p>	<p>Search for records for which the specified unit/user is specified in the unit registration line.</p> <p><b>Note:</b> Searching for a specific unit will yield both results for said unit as well as results for individual users in the unit.</p>
<p>“Receiver seen”</p>	<p>All/Some/Not all/Nobody</p>	<p>This field makes it possible to sort search based on whether the recipient(s) has/have seen the record/email.</p> <p><b>Note:</b> Only applies to unit registration.</p>
<p>“Access”</p>	<p>Undefined/Involved/Unit/All</p>	<p>Search for records by the specified access level.</p>





### The “Delivery” search group

Search field	Possible values	Description
“From”	Participant/User/Unit / Me/My unit/email address	<p>Search for emails sent by the specified participant, user or unit.</p> <p><b>Note:</b> Searching for a specific unit will yield both results for said unit as well as results for individual users in the unit. This only applies to units in the participant register or selected through the auto completer.</p>
“To”	Participant/User/Unit/ Me/My unit/email address	<p>Search for emails received by the specified participant, user or unit.</p> <p><b>Note:</b> Searching for a specific unit will yield both results for said unit as well as results for individual users in the unit. This only applies to units in the participant register or selected through the auto completer.</p>
“Sent”	Yes/No	Search for emails based on whether they have been sent.
“Record type”	Undefined/Inbound/ Outbound/Internal	Search for records sent to or received from external participants, or records for internal use.
“Read”	Yes/No	Search for emails based on whether they have been read.
“Received date”	Date or one of the special values <i>Yesterday, Today,</i>	Search for a date or an interval within which

Search field	Possible values	Description
	<p>Tomorrow, or <i>Undefined</i>.</p> <p>It is also possible to use + and -.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	<p>an email has been received.</p> <p>Using <i>Yesterday, Today, or Tomorrow</i> launches a dynamic search based on current date.</p> <p><i>Undefined</i> = no date of receipt.</p>
"Letter date"	<p>Dates/Intervals.</p> <p>Enter a specific date, or select one of the predefined <i>Yesterday, Today, or Tomorrow</i>.</p> <p>It is also possible to use + and -.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	<p>Similar to the "Received date" field. This search is for date of letter and not by date of receipt.</p>

### The "Case related" search group

Search field	Possible values	Description
"Case"	<p>Search by string, case number or by <i>Defined</i> or <i>Undefined</i></p>	<p>F2 automatically suggest case titles when the user starts typing in this field.</p> <p>A case can also be selected via the case icon.</p> <p>Searching for <i>Defined</i> will display records added to any case.</p> <p>Searching for <i>Undefined</i> will display records not added to a case.</p> <p>The search terms <i>Defined</i> and <i>Undefined</i> are especially useful when combined with other search criteria.</p>

Search field	Possible values	Description
"Registered"	Yes/No	Search for cases attached to records based on whether they have been registered.
"Record No"	Record number or <i>Undefined</i>	A record is automatically assigned a number when it is on a case that is registered.
"Record/case prior case No.,"/"Record, prior case No.,"/"Case, prior case No."	Case number or <i>Undefined</i>	Search for records or cases via a previous case number.
"Record/case participants"/"Record participants"/"Case participants"	Users/Units/ External participants	<p>Search for cases in which the specified users/units/external participants are involved.</p> <p><b>Note:</b> A system configuration managed by cBrain is available to further specify the search.</p> <p>If this setting enabled, the icons  and  appear in this field.</p> <p>Click on  (union) to show records/cases in which at least one of the specified participants.</p> <p>Click on  (intersection) to show the records/cases in which all the specified parties appear.</p>
"Journal plan"	Values in the journal plan list, set up by an administrator	Search for cases matching the specified journal plan.

Search field	Possible values	Description
"Action code"	Action codes, set up by an administrator	Search for cases with the specified action code.
"Case guide"	Predefined case guides	Search for number of cases with the specified case guide.
"Progress code"	Pre-defined progress codes assigned to cases	Search for applied progress codes.
"Quality stamped"	Yes/No	Search for cases based on whether they have been quality assured.

### The "Chat" search group

Search field	Possible values	Description
"Chat text"	Search string	Search for chats containing the specified search string.
"Chat participant"	User/Me	Search for chats in which the specified user is a participant.  <b>Note:</b> Search results will only include chats in which the user performing the search is a participant.
"Chat title"	Search string	Search for chat titles containing the specified search string.
"Chat entry by"	User/Me	Search for chat messages written by the specified user.  <b>Note:</b> Search results will only include chats in which the user performing the search is a participant.



### The “Other fields” search group

Search field	Possible values	Description
“Record or case created by”/ “Record created by”/“Case created by”	User/Unit/External participant	Search for records/cases created by the specified user/unit/external participant.
“Record or case created”/“Record created”/“Case created”	Date, interval or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined</i> .  It is also possible to use + and -.  If an end date is not specified, the search will include results from the start date and onwards.	Search for records and/or cases created within the specified interval.
“Access limitation on record/case:”/“Access limitation on record:”/“Access limitation on case:”	Security group/ Unit/Team/User	Search for records and cases with an access limitation.
“SSN/CVR No of record/case”/“SSN/CVR No of record”/“SSN/CVR No of case”	SSN/CVR number	Search for records and/or cases with the specified SSN/CVR number.
“Record/case involved participants”/“Record involved participants”/“Case involved participants”	User/Unit/External participant	Search for documents and/or cases with the specified user/unit/external participant as a participant involved in the record/case.
“External case ID”	Case number	Search for records with the specified external case ID.
Standard-search	Predefined searches created by an administrator	Predefined searches are available in this field.

Search field	Possible values	Description
"Reminder date"	<p>Date, interval or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined</i>.</p> <p>It is also possible to use + and -.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	Search for records with a reminder date within the specified interval.
"Annotation text"	Search string	Search for annotations containing the specified search string.

### The "Approval process" search group (add-on module)

Search field	Possible values	Description
"Responsible"	User/Unit/Me/My unit	Search for approvals for which the specified user or unit is responsible.
"Approvers"	User/Me	Search for approvals for which the specified user is the approver.
"Current step"	The approver on the current step	Search for records with the specified approver for the current approval step.
"Current step or thereafter"	Approver on the current step or thereafter	Search for records with the specified approver for either the current or a pending approval step.
"Deadline"	<p>Date, interval or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined</i>.</p> <p>It is also possible to use + and -.</p>	Search for approvals with deadlines within the specified interval.

Search field	Possible values	Description
	<p>If an end date is not specified, the search will include results from the start date and onwards.</p>	
<p>“Deadline, current step”</p>	<p>Date, interval or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined</i>.</p> <p>It is also possible to use + and -.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	<p>Search for approvals with current step deadline within the specified interval.</p>
<p>“Start date”</p>	<p>Date, interval or one of the special values <i>Yesterday, Today, Tomorrow, or Undefined</i>.</p> <p>It is also possible to use + and -.</p> <p>If an end date is not specified, the search will include results from the start date and onwards.</p>	<p>Search for approvals that have been initiated during the specified interval.</p>
<p>“Urgent”</p>	<p>Yes/No</p>	<p>Search for approvals with or without urgent status.</p>
<p>“Approval type”</p>	<p>Value list created by an administrator.</p>	<p>Search for approvals of the specified type.</p>
<p>“Started”</p>	<p>Yes/No</p>	<p>Search for approvals that either have or have not been initiated.</p>

Search field	Possible values	Description
"Approval status"	In process/ Completed/ Cancelled	Search for approvals that are either in process, completed or cancelled.
"State of approval"	Returned/Approved / Conditionally approved	Search for approvals that have either been returned, approved or conditionally approved.

### The "Request" search group (add-on module)

Search field	Possible values	Description
"Creator"	User/Unit/Me/My unit	Search for requests created by the specified user/unit.
"Type"	Predefined request types managed by an administrator	Search for requests based on type.
"Deadline"	Date, interval, or one of the special values <i>Yesterday, Today, Tomorrow</i> .  If an end date is not specified, the search will include results from the start date and onwards.	Search for requests with a specific deadline.  Using - and + it is possible to perform a dynamic search. Entering e.g. +7 will always search for deadlines seven days from the current date.
"Internal deadline"	Date, interval, or one of the special values <i>Yesterday, Today, Tomorrow</i> .  If an end date is not specified, the search will include results from the start date and onwards.	Search for requests with a specific internal deadline.  Using - and + it is possible to perform a dynamic search. Entering e.g. +7 will always search for deadlines seven days from the current date.
"Description"	Search string	Search for requests whose description contains the specified search string.

<b>Search field</b>	<b>Possible values</b>	<b>Description</b>
"Recipient"	Users/Unit/Me/My unit	Search for requests sent to the specified user/unit.
"Executor"	Users/Unit/Me/My unit	Search for requests for which the specified user/unit is the executing party.
"Executed"	Yes/No	Search for requests that either have or have not been executed.
"Return to"	User/Unit/Me/My unit	Search for requests to be returned to the specified user/unit.
"Approved"	Yes/No	Search for requests that either have or have not been approved.

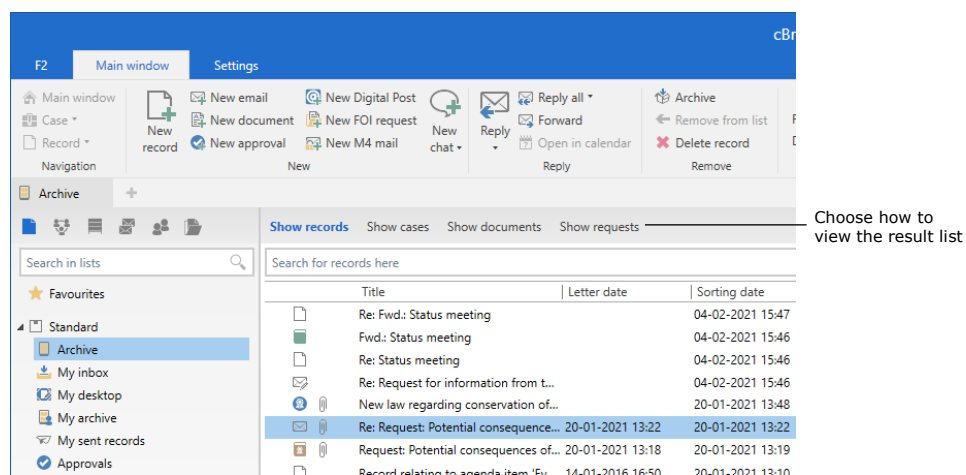
## The search result view

The results of any search are displayed in the result list in F2's main window. The user can choose to view the result list as a list of records, cases, documents or requests. In the example below the result list is shown as records.

It is possible to limit the number of displayed search results through the user's personal settings. For example, changing the number to 300 will result in lists of 300 results displayed at most.

### View records, cases, documents or requests in the result list

The user can choose to view the result list as either records, cases, documents or requests. This is done by clicking on the desired view above the free-text search field in the main window.





**Figure 17: View the result list as records, cases, documents, or requests**

**Note:** Not all records are associated with a case. The choice of showing either records or cases therefore impacts the number of records shown in the result list. When choosing "Show cases", a secondary list of records is shown underneath the result list. In this view, records that are not assigned to a case will not be visible.

### Show records

Select **Show records** to display records in the result list. The result list consists of all records that match the user's search criteria.

It is possible to view any attached documents by clicking on  to the right of the record icon  as shown below.

Click the paper clip icon to view the attached documents

	Title	Letter date	Sorting date	From
	Re: Fwd.: Status meeting		04-02-2021 15:47	Docadmin
	Fwd.: Status meeting		04-02-2021 15:46	Docadmin
	Re: Status meeting		04-02-2021 15:46	Docadmin
	Re: Request for information from t...		04-02-2021 15:46	Docadmin
	New law regarding conservation of...		20-01-2021 13:48	Sienna Morton
	Re: Request: Potential consequence...	20-01-2021 13:22	20-01-2021 13:22	Samantha Morrison
	Record attachment, ID No 2: Request Approval letter.pdf		2021 13:19	Sienna Morton

**Figure 18: View records with attached documents**

### Show cases

Select **Show cases** to display cases in the result list. Records associated with a case are displayed in the search list view to the right of or below the case list as shown below.

Selected list

	Title	Case No
	SoM - Administrative - 2021 Q1 meeting	2021 - 10
	SoM - Bills - Suggestion for new bill regarding...	2021 - 2
	IT purchases and upgrades in 2021	2021 - 1
	CSR	2019 - 13
	Harbour Renewal	2017 - 8

Selected case

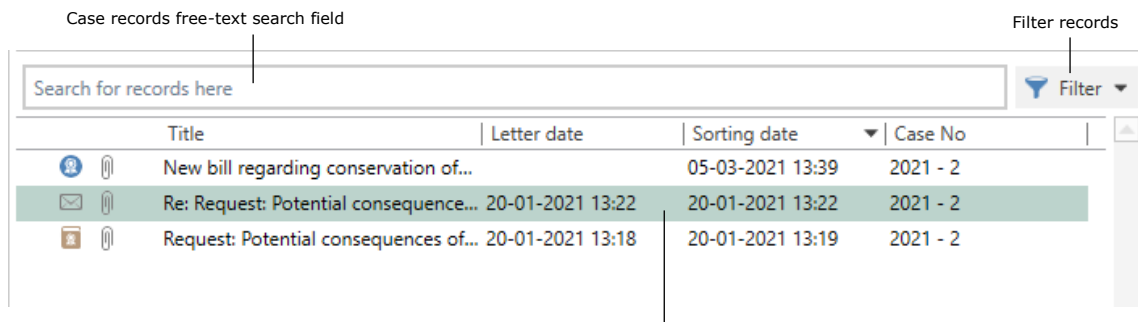
	Title	Letter date	Sorting date	Case No
	New bill regarding conservation of...		05-03-2021 13:39	2021 - 2
	Re: Request: Potential consequence...	20-01-2021 13:22	20-01-2021 13:22	2021 - 2
	Request: Potential consequences of...	20-01-2021 13:18	20-01-2021 13:19	2021 - 2

Result list showing records from selected case

**Figure 19: Case and records lists displayed in the result list**

**Note:** This view excludes all records not assigned to cases. Records without a case will not be displayed, even if they otherwise match the list or the search criteria.

The selected case's list of records have a separate free-text search field associated with it. This allows filtering in the same manner as when the result list shows records. Read more about this in the sections *Search with filtering* and *The "Filter" button*.



Highlighted records match the current list's search criteria

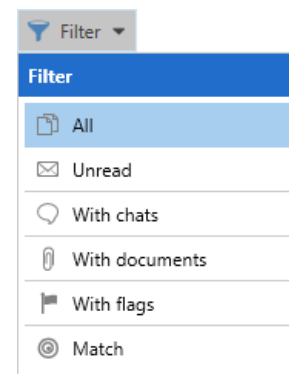
**Figure 20: The records on the selected case**

Additionally, F2 highlights the records on the case which match the active search criteria of the selected list. The highlight is green, as shown above. In this example, one of the records are highlighted despite the free-text search field having no active search criteria. The record is instead highlighted because it is located in the active list, "My desktop", in which the case was found. The records with white backgrounds are on the case, but not in the selected list.

Next to the record list is the **Filter** button.

This button, like the one in the result list, allows for filtering of the case's records by "All", "Unread", "With chats", "With documents", and "With flags", and in this case also offers filtering by "Match".

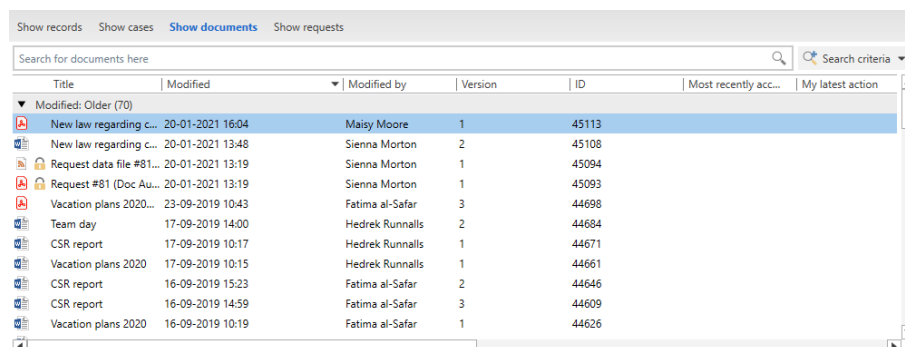
Select "Match" to only see the records that match the list's search criteria.



**Figure 21: The "Match" filter**

## Show documents

Select **Show documents** to display documents in the result list. A padlock icon is displayed next to a document if it is locked. A locked document cannot be edited. A document may be locked if it is attached to an email or if the responsible user has chosen to prevent it from being updated.



**Figure 22: Show documents in the result list**



Double-clicking on a **selected document** opens the document directly while the associated record is opened in the background.

The result list displays all documents attached to records matching the search criteria. If a record has multiple documents attached, they will all be displayed as long as at least one matches the search criteria. This is due to F2's free-text search always being based on records, and a document's contents, title, and external ID are considered parts of its record.

## Show requests

Select **Show requests** to display requests in the result list.

Double-clicking on a **request** opens its record. If there are several requests on the same record, the record will appear several times in the list as only one request is displayed per line.

Record title	Request type	Recipient	Rec.ID	Deadline
▼ Deadline: Older (7)				
Request: Potential consequences of the sug...	See text below	Digital Secretariat of the...	662	27-01-20
Renewal of harbour	See text below	Secretariat of the manage...	416	28-05-20
Quality control, internal check up		Secretariat of the manage...	228	17-07-20
Delivery		Stanley Matthews	140	22-01-20
Job request	For approval	Ann Sekner	134	20-01-20
Job request	For approval	Abigail Anderson	134	20-01-20
Request for climate report	For information	Carmen Collins	53	19-12-20
▼ Deadline: (3)				
Fwd: Status meeting		Ireene Todd	82	
Request: Request: Summer seminar		Administrator	247	
Request: Jordan river		Environmental Department	207	

Figure 23: Display requests in the result list

## Sorting the search results

All search results are sorted using columns. The applies both to search results generated by searching for metadata in an advanced search or by using the free-text search field.

As when sorting the inbox and other lists, the user chooses how to sort the list by clicking on a **column**. Each column can be sorted in ascending or descending order.

F2 lets the user sort by two columns at once. First, click on a desired column to sort by. Then press and hold the Shift button and click on a second column by which to sort the search results.

F2 remembers which column the user last used to sort each list. All lists are individually sorted.

## Columns

The table below describes each column in the result list and its use.

The columns available depends on whether the result list shows records, cases, documents, or requests. The number of columns may vary between installations.

Several of the listed columns may only appear if the relevant add-on module is installed.

For further information on setting up columns, see the *F2 Desktop – Settings and Setup* user manual.












### Columns when showing records

Column	Description
<b>Approval process</b>	
"Appl: Days left"	Displays the time in days until the deadline for the approval of a record.
"Appl: Progress"	Displays a colour coded overview of the approval progress with the current approver highlighted in blue. Any previous approvers are highlighted in light blue, while future approvers are grey.  The users set as approvers can be identified by their initials. The user's own initials are displayed in bold.
"Approval deadline"	Displays the deadline for the approval.
"Location"	Displays the current location of an approval (add-on module).
"Urgent"	Shows whether an approval has been marked as urgent.
<b>Case</b>	
"Case No"	Shows the number of the case on which a record is located.  <b>Note:</b> If the result list is showing records, this column displays the number of the case on which a record is placed.
"Case folder"	Displays the case folder in which the record is placed.
"Case guide type"	Shows the case guide type set in a case.  <b>Note:</b> If the result list is displayed as records, the column indicates the case guide of the case, in which a certain record is placed.
"Case keyword"	Displays any keywords associated with a case.  <b>Note:</b> If the result list is showing records, this column displays the keywords of the case on which a record is placed.
"Case title"	Displays the title of the case.

Column	Description
"Previous case No."	Indicates the previous case number for the record or case. The number can originate from a different system or from a case in F2. The field can also be filled in manually.
<b>Deadline</b>	
"Deadline"	Displays the formal deadline of a record.
"Deadline, the units case handling"	Displays the deadline a recipient unit has set for its own management.
"My deadline"	Displays the deadline the user has allocated to the record via personal management in the menu item "Deadline".
"My unit deadline"	Displays the deadline the user has allocated to the record via unit management in the menu item "Deadline".
<b>Delivery</b>	
"Letter date"	Displays the letter date registered in the record. In case of scanned letters, this should indicate the actual letter date.
"Bcc"	Displays any Bcc recipients of an email.
"Cc"	Displays any copied recipients (Cc) on a record.
"E-mail title"	Displays the original title of an incoming email.
"Forward of record"	Displays the title of the forwarded record.
"From"	Displays the sender of records containing sent or received material.  <b>Note:</b> In case of scanned letters, it is possible to edit the record recipient so the column shows the original sender.
"Mail received date"	Displays the registered receipt time of incoming letters and emails.  <b>Note:</b> In case of scanned letters, it is possible to edit the record date. In case of emails, the date is set automatically by F2.
"Reply to record"	Displays the title of the record to which a specified record is a response.
"Secure email"	Shows whether the user has selected "Send securely" when sending the record to external recipients.

Column	Description
"Sent"	Shows whether the record has been sent. The field changes automatically from "No" to "Yes" when the "Sent" function is used and for incoming emails. This field makes it possible to filter out unsent draft records for which sender and recipient have been filled.
"To"	Shows the recipient of a record containing sent or received material.  <b>Note:</b> If the field is filled in manually, when F2 contains sent and received letters that have been scanned, the column also shows the recipient of the scanned letters.

### Icons

"Attached file icon"	Displays the  icon on any records with documents attached.
"Icon"	Displays icons for, respectively: <ul style="list-style-type: none"> <li>Record </li> <li>Email </li> <li>Request </li> <li>Approval </li> <li>Digital Post </li> </ul> <p>See <i>F2 Icon Appendix</i> for more information about the icons and their variations.</p>
"Message icon"	Shows the icon for: <ul style="list-style-type: none"> <li>Chat </li> <li>Note </li> <li>Annotation </li> <li>Orientation </li> </ul> <p>Only one icon is displayed per record, and the more formal icon takes precedence. If the record has a chat and a note, the note icon is displayed. If the record has an annotation as well, the annotation icon is displayed.</p>
"Reminder icon"	Shows whether there is a reminder on a record.
"Active FOI request icon" (add-on)	Displays the  icon.  The icon shows the record containing the most recent PDF-generated FOI request report. This column is

Column	Description
	intended to be shown to the left of the "Title" column, making the arrow icon point to the relevant record.
<b>Record</b>	
"Sorting date"	<p>Displays when a record has been placed in a user's personal lists such as "My desktop", "My inbox" and "My archive".</p> <p>The sorting date of a record in one of the personal lists is only affected by the changes that would cause the record to be added to the given personal list, in which it is already placed.</p> <p>For example, if a chat on a record, which is already in the user's inbox, is sent to the user, the sorting date will be updated. The last updated date in this example will not change.</p> <p><b>Note:</b> In the lists or searches with no personal management of the individual users, the sorting date is the same as the "Latest updated" date of the record.</p>
"Title"	Shows the title a user has given a record.
"Access"	Shows the access restriction for a record.
"Annotations"	Displays the number of annotations on a record.
"Archive area"	<p>Shows whether the record is located in:</p> <ul style="list-style-type: none"> <li>• "Archive"</li> <li>• "Library"</li> <li>• "My deleted records"</li> <li>• "My private records".</li> </ul>
"Case help"	Shows whether case help is activated on a record.
"Created by"	Displays the user that has created the record.
"Date created"	Displays the date automatically allocated to a record when it is created.
"Deleted by"	<p>Displays the user who has deleted the request.</p> <p><b>Note:</b> This column only contains values if the chosen list is either "My deleted records" or "Search all over".</p>



Column	Description
"Document locked"	Shows whether the documents attached to a record have been locked for editing.
"External access" (add-on)	Shows whether external sharing of a record is: <ul style="list-style-type: none"> <li>• Open</li> <li>• Partially open</li> <li>• Closed.</li> </ul> <p><b>Note:</b> This setup can be customised and may vary from organisation to organisation.</p>
"Keywords"	Displays the keywords associated with the record.
"Latest update"	Displays the time of the most recent change in a record, the metadata of a record or the documents of a record. These changes are also found in the history of the record. <p><b>Note:</b> "Latest update" should <u>not</u> be confused with "Sorting date".</p>
"Locked"	Displays whether a case is included in the periodic delivery to the National Archives. <p><b>Note:</b> The period shift function (ongoing delivery) to the National Archives is active only if the technical service called period shift is enabled. Therefore, it is not possible to select the value, it can only be searched for.</p>
"My flag"	Displays the flag the user has allocated to a record via personal management in the menu item "Flag".
"My unit flag"	Displays the flag the user has allocated to a record via the unit management in the menu item "Flag".
"Original file path"	Displays the path used as the basis for a record if the record has been imported via document import from a server. This way it is possible to see where the underlying document for the record was located before being imported.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Record number"	Displays the consecutive number allocated to a record when it has been registered.

Column	Description
	<p><b>Note:</b> A record that is registered has only <u>one</u> record number. The record number should not be confused with the record ID.</p>
"Record type"	<p>Shows whether the record is:</p> <ul style="list-style-type: none"> <li>• "Internal" – i.e. available to internal users</li> <li>• "Incoming" – i.e. received from external participants</li> <li>• "Outgoing" – i.e. sent to external participants</li> </ul>
"Registered"	<p>Shows whether a record has been registered.</p> <p><b>Note:</b> This column is empty if the record's "Registered" field has not been filled in.</p>
"Remind Date"	<p>Displays the date set by a user for management purposes.</p> <p><b>Note:</b> The reminder date does not pop up as a reminder but can be used as a basis for searching or sorting lists.</p>
"SSN/CVR No"	<p>Shows the SSN/CVR number a user has written in the record.</p>
"Status"	<p>Shows whether the record has been formally completed or is still being processed. It is still possible to edit a record which status has been set to "Complete". A case can only be set as "Complete" if all its associated records have been set to "Complete" as well.</p>
"Suppl. case mgr."	<p>Shows the supplementary case managers on a record.</p>
"Version No"	<p>Shows the version number of the record.</p>
<b>Requests</b>	
"Request"	<p>Shows whether there is a request on a record.</p>
"Request completed"	<p>Shows whether the record's request has been marked as completed.</p>
"Request created by"	<p>Displays the user who created the request.</p>
"Request deadline"	<p>Displays the deadline for the request set by the creator.</p>
"Request execution date"	<p>Displays when a request was executed.</p>

Column	Description
"Request executor"	Displays the user or unit that executes a request on a record.
"Request recipient"	Displays the user or unit set as the request recipient.
"Request reply date"	Shows when a request has been replied to (when the answer record was sent).
"Request status"	Shows whether the request is: <ul style="list-style-type: none"> <li>• Sent</li> <li>• Accepted</li> <li>• Cancelled</li> <li>• Executed</li> <li>• Completed</li> </ul>
"Request text"	Shows the date and time for when the request was sent.
"Request type"	Displays the content of the text field of the request. <b>Note:</b> Request types may vary from organisation to organisation as the types are configured on an organisational level.
"Request, internal deadline"	Displays the request recipient's own deadline.
<b>Responsibility</b>	
"Responsible"	Displays the user or unit responsible for the record.
"Responsible unit"	Displays the unit responsible for the record. <b>Note:</b> If the responsible party a user, the column displays the unit with which the user is associated.
"Responsible, the units case handling"	Displays the user who is formally responsible for the recipient unit. <b>Note:</b> If the user responsible for the record has not yet been specified, the recipient unit will be displayed as the responsible party.





### Columns when showing cases

Column	Description
"Case icon"	Generally displays the  icon. If the case is an F2 Manager-case, the icon will change to reflect this. For more information on case icons, see <i>F2 Icon Appendix</i> .
"Case No"	Shows the number of the case.
"New message for me icon"	Displays the  icon if there are any notes on the case. Hover the cursor over the icon to see a preview of the latest note.
"Progress code icon"	Displays a warning icon that reflects the deadline corresponding to the current progress code.
"Title"	Displays the title of the case.
"Action codes"	Displays the case's action codes.
"Case guide type"	Shows the case guide type set in a case.  <b>Note:</b> If the result list is displayed as records, the column indicates the case guide of the case, in which a certain record is placed.
"Completed by"	Displays the name of the user that completed the case.
"Completed date"	Displays the date and time the case were completed.
"Created by"	Displays the user that has created the case.
"Date created"	Displays the date automatically allocated to a case when it is created.
"Deadline"	Displays the formal deadline of a case.
"Disposal code"	Displays whether and when the case should be disposed.
"External access" (add-on)	Shows whether external sharing of a case is: <ul style="list-style-type: none"> <li>• Open</li> <li>• Partially open</li> <li>• Closed.</li> </ul> <b>Note:</b> This setup can be customised and may vary from organisation to organisation.
"External ID"	Displays the external ID.

Column	Description
"File plan"	Displays the case's file plan.
"Keywords"	Displays any keywords associated with a case.
"Locked"	Displays whether a case is included in the periodic delivery to the National Archives.  <b>Note:</b> The period shift function (ongoing delivery) to the National Archives is active only if the technical service called period shift is enabled. Therefore, it is not possible to select the value, it can only be searched for.
"Previous case No."	Indicates the previous case number for the case. The number can originate from a different system or from a case in F2. The field can also be filled in manually.
"Progress code"	Displays the case's progress code.
"Responsible"	Displays the user or unit responsible for the case.
"SSN/CVR No"	Shows the SSN/CVR number a user has written in the case.
"Status"	Shows whether the case has been formally completed or is still being processed.
"Suppl. case mgr."	Shows the supplementary case managers on a case.

### Columns when showing documents

Column	Description
"Case No"	Shows the number of the case on which the document's associated record is located.
"Case title"	Displays the title of the case.
"Document icon"	Displays the file format of the document through an icon.  For instance, a Microsoft Word icon  denotes a DOCX file.
"External ID"	Displays the external ID of the document. This may be used when referring to documents in a case guide (add-on).
"ID"	Displays the ID (key) that is automatically allocated to a document when created.

Column	Description
"Modified"	Displays the date and time when the document was last edited.
"Modified by"	Displays the name of the user who last edited the document.
"Most recently accessed by me"	Displays the date and time when the user last accessed the document.
"My latest action"	Displays the last action the user made in relation to the document, e.g. "Opened" it or "Updated" it.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Record locked"	Displays a padlock  if the document is locked, i.e. protected from edits.
"Record title"	Shows the title a user has given a document's associated record.
"Record type"	Shows whether the document's associated record is: <ul style="list-style-type: none"> <li>• "Internal" – i.e. available to internal users</li> <li>• "Incoming" – i.e. received from external participants</li> <li>• "Outgoing" – i.e. sent to external participants</li> </ul>
"Size(KB)"	Displays the size of the document.
"Title"	Shows the title a user has given a document.
"Version"	Displays the current version of the document.

### Columns when showing requests (add-on module)

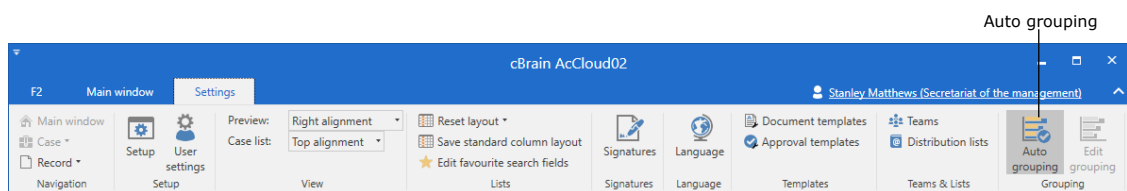
Column	Description
"Case No"	Shows the number of the case on which a record with a request is located.
"Case title"	Displays the title of the case.
"Deadline"	Displays the deadline for the request set by the creator.
"Executor"	Displays the user or unit that executes a request on a record.
"Icon"	Displays the request icon.

Column	Description
	For more information on the exact icons and their use, see <i>F2 Icon Appendix</i> .
"ID"	Displays the ID of the request.
"Internal deadline"	Displays the request recipient's own deadline.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Recipient"	Displays the user or unit set as the request recipient.
"Record recipients"	Displays any recipients who received the request as an email.
"Record sender"	Displays the sender if the request was sent as an email.
"Record title"	Displays the current title of the record.
"Request created"	Displays the date and time of the request's creation.
"Request created by"	Displays the user who created the request.
"Request sender"	Displays the name of the user who sent the request.
"Request sent"	Displays the date and time the request was sent.
"Request type"	Displays the content of the text field of the request.  <b>Note:</b> Request types may vary from organisation to organisation as the types are configured on an organisational level.
"Unique record title"	Displays the current title of the record and its ID.

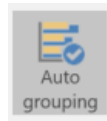
## Auto grouping

It is possible to group F2's result list based on a selected column by using auto grouping.

Click on **Auto grouping** in the "Settings" tab to enable or disable auto grouping.



**Figure 24: "Auto grouping" in the "Settings" tab**



If its menu item is dark grey, "Auto grouping" is enabled.

**Figure 25: "Auto grouping" enabled**



If its menu item is light grey, "Auto grouping" is disabled.

**Figure 26: "Auto grouping" disabled**

Each subgroup header displays the number of items it contains as well as the number of unread items. This applies to both the main and case windows.

Subgroup header showing items in total and items unread Auto grouping enabled

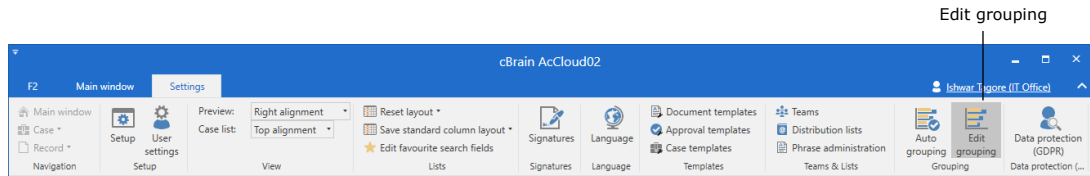
Title	Letter date	Sorting date	From	Case No
<b>Sorting date: Today: 2 item(s), 1 unread</b>				
<b>Budget for 2021</b>	05-03-2021 14:27		Ishwar Tagore	2021 - 1
Mass invitation for Friday seminar	05-03-2021 14:13		Klaus Salomon	2021 - 6
<b>Sorting date: Last week: 4 item(s)</b>				
<b>Template - Upgrade manual</b>	22-02-2021 15:03	22-02-2021 15:03	Ireene Todd	2021 - 5
Team meeting agenda TEMPLATE	22-02-2021 13:19	22-02-2021 13:19	Ireene Todd	2021 - 6
Mass invitation	22-02-2021 11:48	22-02-2021 11:48	Klaus Salomon	2021 - 6
Mass invitation	22-02-2021 11:48	22-02-2021 11:48	Klaus Salomon	2019 - 20
<b>Sorting date: Last month: 10 item(s)</b>				
2021 budget - maintenance evalua...	18-02-2021 14:08	18-02-2021 14:08	Fatima al-Safar	2021 - 1
Enquiry regarding legal advice	16-02-2021 13:23	16-02-2021 13:23	Klaus Salomon	2021 - 7
Budget presentation	12-02-2021 13:01	12-02-2021 13:01	Klaus Salomon	2021 - 1
Versions of FOI request reports	12-02-2021 12:25	12-02-2021 12:25	Ireene Todd	2018 - 3
FOI Request Report	12-02-2021 11:47	12-02-2021 11:47	Ireene Todd	2018 - 3
Re: Fwd.: Status meeting	04-02-2021 15:47	04-02-2021 15:47	Docadmin	2016 - 24
Fwd.: Status meeting	04-02-2021 15:46	04-02-2021 15:46	Docadmin	2016 - 24
Re: Status meeting	04-02-2021 15:46	04-02-2021 15:46	Docadmin	2016 - 24

**Figure 27: Auto grouping enabled in the main window**

It is possible to set a future date as the letter date on a record. This may be useful if a case manager has written a letter before it has to be sent. In the result list, a "Future" subgroup allows the user to keep track of records with a future letter date. The "Future" subgroup will appear as the top group in the result list when the results are sorted by letter date.

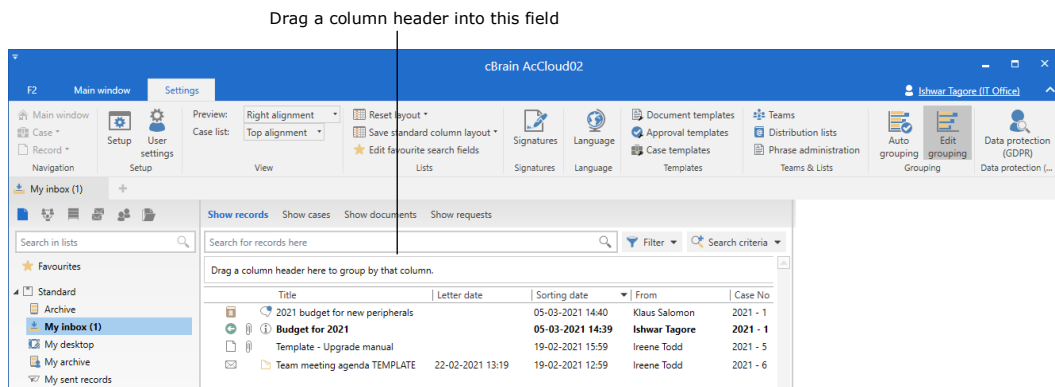
## Edit grouping

The standard columns in the result list are chosen during the configuration of F2. Users can also configure the result list by creating their own grouping of columns.



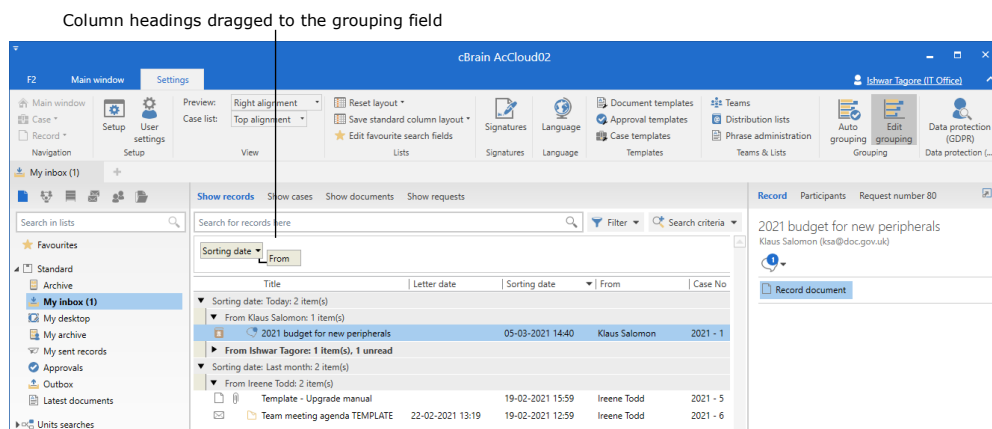
**Figure 28: "Edit grouping" in the "Settings" tab**

Click on **Edit grouping** in the "Settings" tab to view group headers in the result list.



**Figure 29: The grouping area**

The results are grouped by dragging the desired column header to the grouping field, thereby creating a folder structure as shown below.



**Figure 30: User-created folder structure**


**Note:** Grouping into several levels is possible by dragging several column headlines into the grouping field.

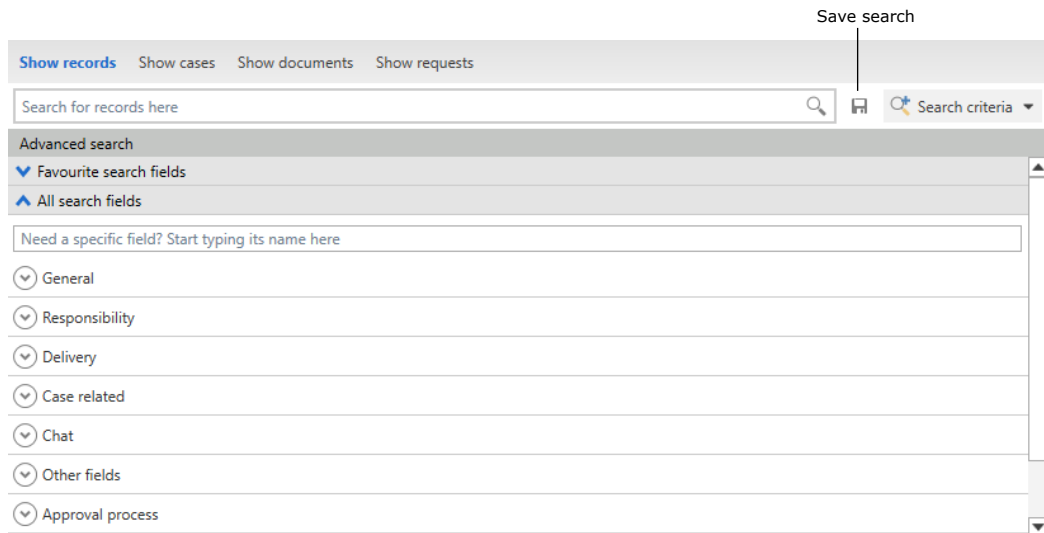
To remove the subgroup headers as well as the grouping option, click **Edit grouping** again or drag the chosen column header back down to the result list.

The **Edit grouping** menu item is only active when "Auto grouping" is disabled.

**Note:** Any user-created folder structures will be removed when the user selects "Auto grouping".

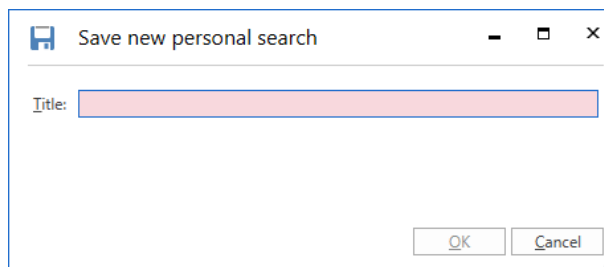
## Saving a search

It is possible to save a search so it is easy to perform again. To do this, click the disk icon  while “Advanced search” is enabled.



**Figure 31: Save search**

When the “Save new personal search” dialogue appears, name the search and click **OK** to save it to “Personal searches” in the main window.



**Figure 32: To save a search, enter a title**

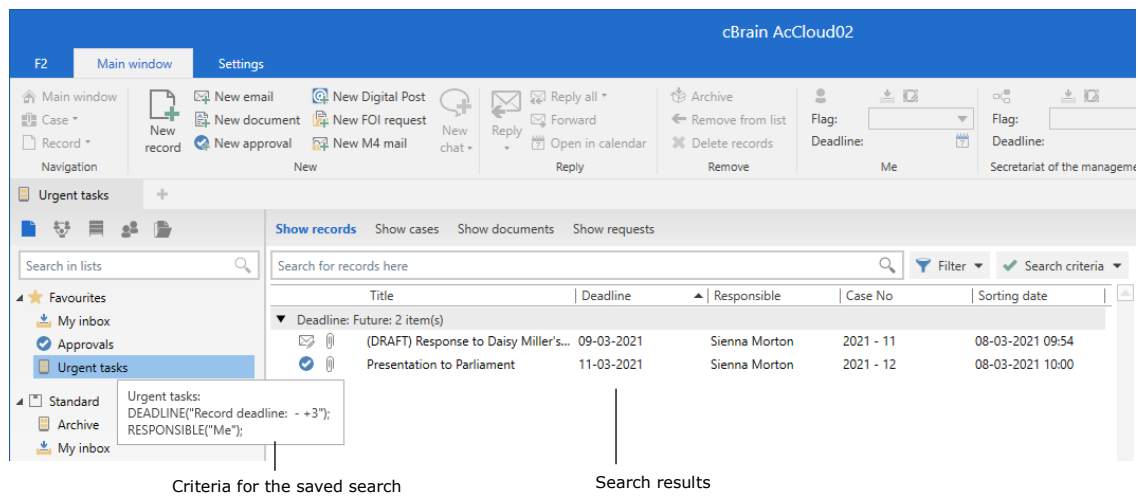
A user with the “Search administrator” privilege can make the saved search available to a unit or as a fixed search for the entire organisation. See *F2 Desktop – Administrator* for further information.

Personal searches are useful for creating lists of frequently used records, keywords or flags, or for providing the user with a better overview. Saved personal searches are dynamic, which means that new records or cases that meet the search criteria are automatically added to the list. Additionally, a selected list can be updated by pressing **F5**.

In the figure below, a user has saved a personal search and added it to their favourites. When the cursor is hovering over the list (on the left side of F2’s main window), its search criteria are displayed.











In this example the search criteria are "DEADLINE ("Record deadline - +3")" and "RESPONSIBLE("Me")". The user can click on the list to display all records for which they are responsible and are due within the next 3 days.



**Figure 33: A saved search as a list**

Personal searches, also called personal lists, are displayed under the node "Personal searches" in the list view. The icon to the left of a personal search indicates where the list performs its search.

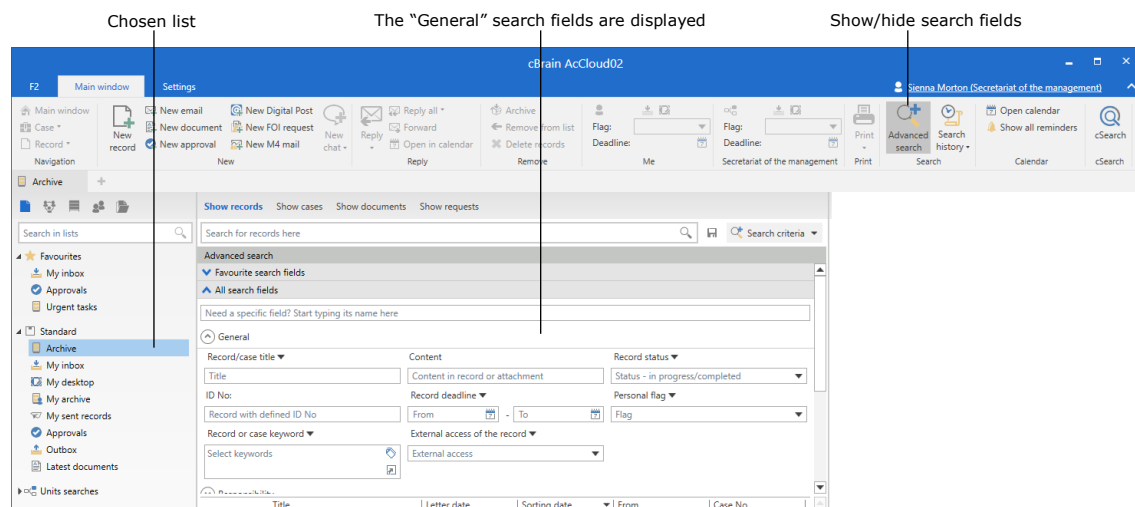
The icons correspond to the lists as follows:

-  Archive
-  My inbox
-  My desktop
-  My archive
-  My private records
-  My deleted records
-  Library
-  Search all over

**Figure 34: The icons indicate from where a search was created**

## Search lists can retain the search field view

The search lists can remember if the search fields were displayed or hidden the last time a list was shown. When a list is chosen on the left side of the main window, the search fields will appear in the same way as when the list was last viewed.



**Figure 35: Search fields displayed in the result list**

It is always possible to display or hide search fields by clicking the **Advanced search** menu item in the main window ribbon.

The option to retain search fields is found on the "Settings" tab. Click the **Setup** menu item and then on the **Main window** tab in the dialogue. Tick or untick the box "Always hide my search fields when I change lists" to select the preferred search field display option.

For more information about personal settings in F2, see *F2 Desktop – Settings and Setup*.

## Naming of searches performed in unit lists

When a user performs a search in a unit's inbox, desktop or archive, F2 does not automatically remember from which unit's list the search was performed. It is up to the user to give the search a title that takes the name of the unit into account.

The reason for this is that a user can be associated with multiple units, and F2 does not automatically show the unit list in which the search was performed. This applies to both personal searches and when a user with the "Search administrator" privilege performs searches on a unit level.

For example:

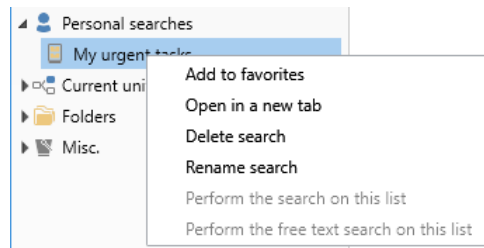
Holly Rogers has several job roles and thus access to the inboxes, desktops and archives of several units, including the HR unit. Holly now performs a search in HR's inbox using the search criterion record manager: "Holly Rogers".

Holly wants to save her search. Since F2 does not save the unit list from which the search is performed, Holly should include the name of the unit in the search's title. A title like "Records in the unit's inbox with me as manager" is too general and does not show in which unit the search is performed. Instead, she saves and names the search, "Records in HR's inbox with me as manager".

**Note:** Personal searches (e.g. searches in “My inbox”, “My desktop”, and “Archive”) correspond to the user’s current unit. This also applies to the unit’s flag, deadline, read/unread, etc.

### Deleting and renaming personal searches

A personal search can always be deleted or renamed. Right-click on a personal search to open the context menu shown below. The figure below shows the context menu for a personal search, “My urgent tasks”.



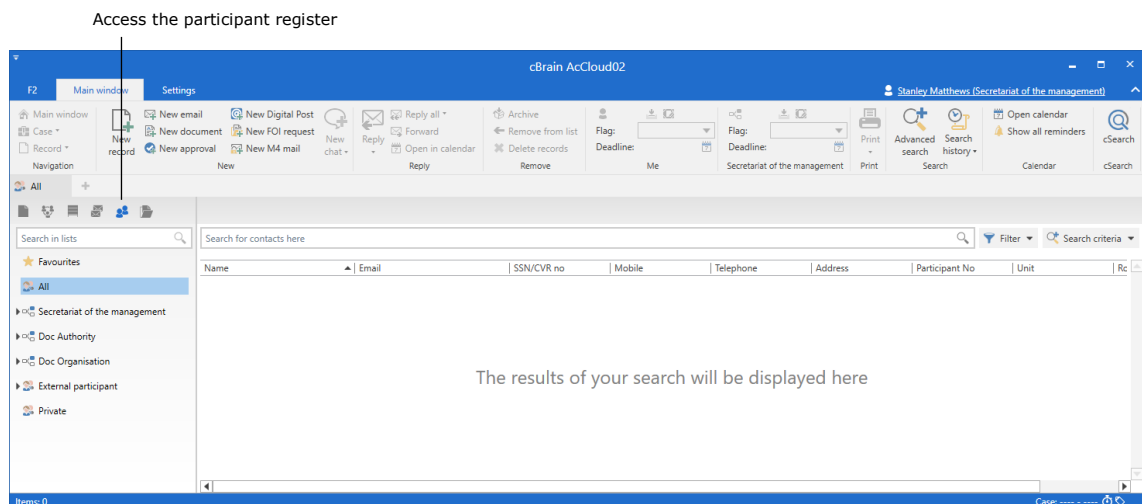
**Figure 36: Delete or rename a personal search**

# Search for participants

F2's participant register contains the internal and external contacts of the organisation as well as the user's private contacts.

To open the participant register, click on  (the contacts icon) on the navigation line above the lists and folders on the left side of the main window.

The participant register will be displayed in the result list as shown below.



**Figure 37: Access the participant register from the main window**

With the participant register open, click on the **desired node** in the list view to see its associated contacts.

To perform a search in the participant register, click on the magnifying glass or press **Enter**. As with clicking on "Archive" in the main window's list view, a search is not performed automatically when clicking on **All** (i.e. all contacts in the participant register).

It is only when the user clicks on the magnifying glass next to the free-text search field that F2 performs a search in the participant register.

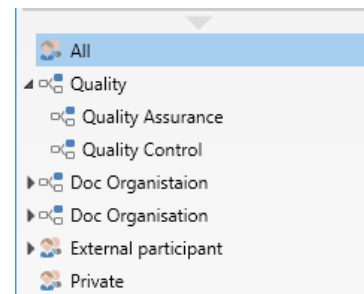
A general search in the participant register can be performed by entering the search term in the free-text search field while search groups can be utilised for more specific searches. Read more about this in the next section.

## Performing a search

To perform a search in the participant register, click on **the node** in which you would like to perform a search.

The following nodes are available:

- All contacts
- The organisation’s authority and units
- External contacts
- Private contacts.

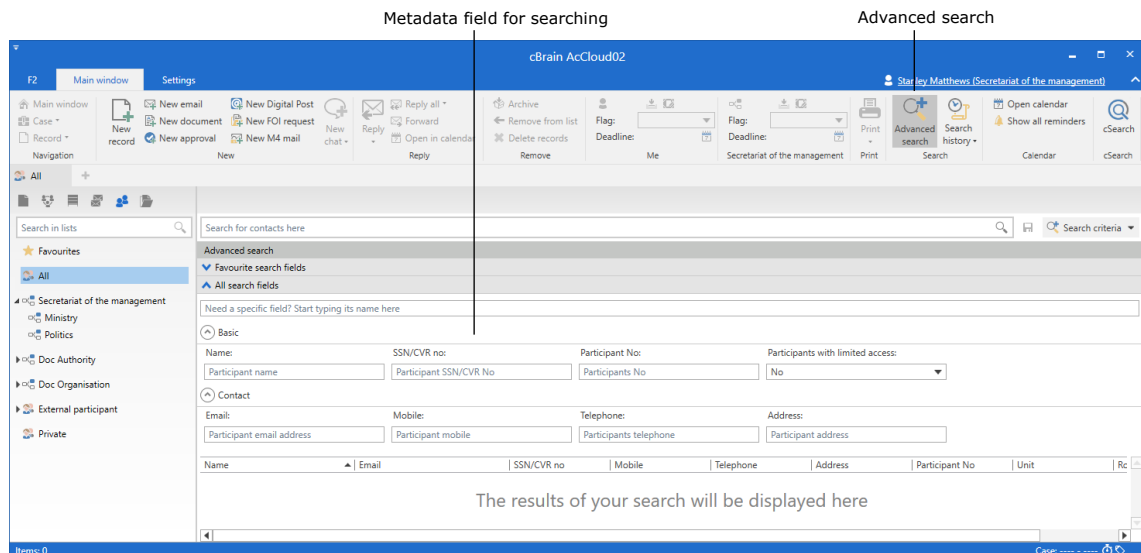


**Figure 38: Nodes of the participant register**

When a node has been chosen, the user performs the search either via the free-text search field or by clicking on **Advanced search** in the main window ribbon.

Clicking on **Advanced search** opens a drop-down menu of search groups in which it is possible to search for specific metadata.

See the example below.



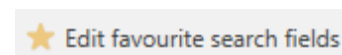
**Figure 39: Access the participant register from the main window**

An advanced participant search is similar to the “Archive” advanced search. For further information, see the *Advanced searches* section.

## Favourite search fields

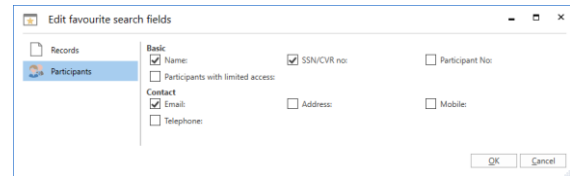
Users can create a search group with their personal favourite search fields.

This is done by clicking on **Edit favourite search fields** in “Settings” ribbon.



**Figure 40: Menu item “Edit favourite search fields”**

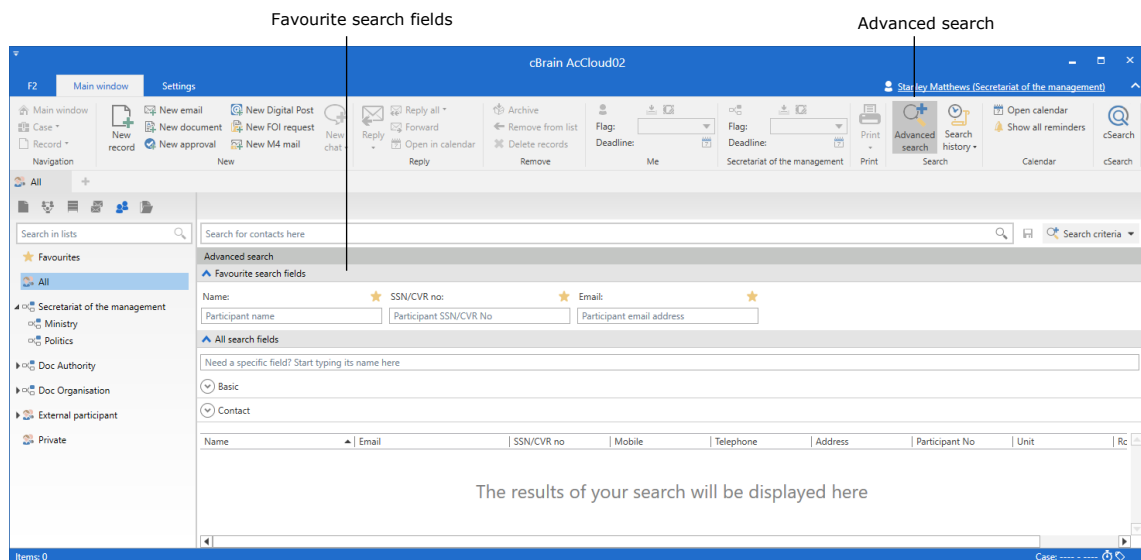
A dialogue with a wide range of predefined search fields will open. Click on **Participants** to the left of the dialogue and tick off the preferred search fields.



Click **OK** to finish.

**Figure 41: "Edit favourite search fields" - participants**

The selected search fields will be added to the group "Favourite search fields" as depicted in the example below.



**Figure 42: Access favourite search fields in the participant register**

The user can also add search fields to favourites when viewing a search group. To do this, hover the cursor over a search field to make a grey star appear. Click on the **star** to add that search field to favourites. The star turns yellow. Click the **star** again to remove the search field from "Favourites search fields".

## Participant search fields

The table below describes each search field and its use.

### The "Basic" search group

Search field	Possible values	Description
"Name"	User/unit	A search is performed for a participant with this name.
"SSN/CVR no"	Number	A search is performed for a participant associated with this SSN/CVR number.

Search field	Possible values	Description
"Participant No"	Number	A search is performed for a participant with the number that was automatically assigned by F2 when the participant was created in the register.
"Participants with limited access"	Yes/No	A search is performed for an external participant with limited access (add-on module).

### The "Contact" search group

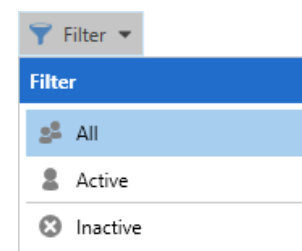
Search field	Possible values	Description
"Email"	Email address	A search is performed for a participant associated with this email address.
"Mobile"	Number	A search is performed for a participant associated with this mobile telephone number.
"Telephone"	Number	A search is performed for a participant associated with this telephone number.
"Address"	Address, town/city and postal code	A search is performed for a participant with this address, town/city or postal code.

### Filtering search results

As in the main window, it is possible to filter the search results in the participant register.




The following filters exist: "All", "Active" and "Inactive".

Access the filters by clicking the **Filter** button.



**Figure 43: Participant register filter options**

The table below describes each filter option.

Filter	Description
 All	Shows all participants in the participant register.
 Active	Shows all active participants in the participant register.
 Inactive	Shows all inactive participants in the participant register.

## Related searches

Related searches are used to keep track of the participant involved in a number of records and/or cases. This provides the user with a comprehensive overview of the participants involved in selected records and/or cases simply by right-clicking.

This search also works in the opposite direction so that it is possible to see records and/or cases in which selected participants are involved.

Related searches are used for:

- Searching for participants based on records/cases
- Searching for records/cases based on participants

This search can be performed by right-clicking in either the main, record or case window as well as the record and case previews.

F2 comes with the following pre-defined related searches:

- All participants involved in one or more selected records.
- All participants involved in one or more selected cases.
- All records in which the selected participants are involved.
- All cases in which the selected participants are involved.

**Note:** The term "Involved" includes everything from "Responsible", "Supplementary case manager" to email sender and recipient.

A related search always displays its results in a new search tab in the main window.

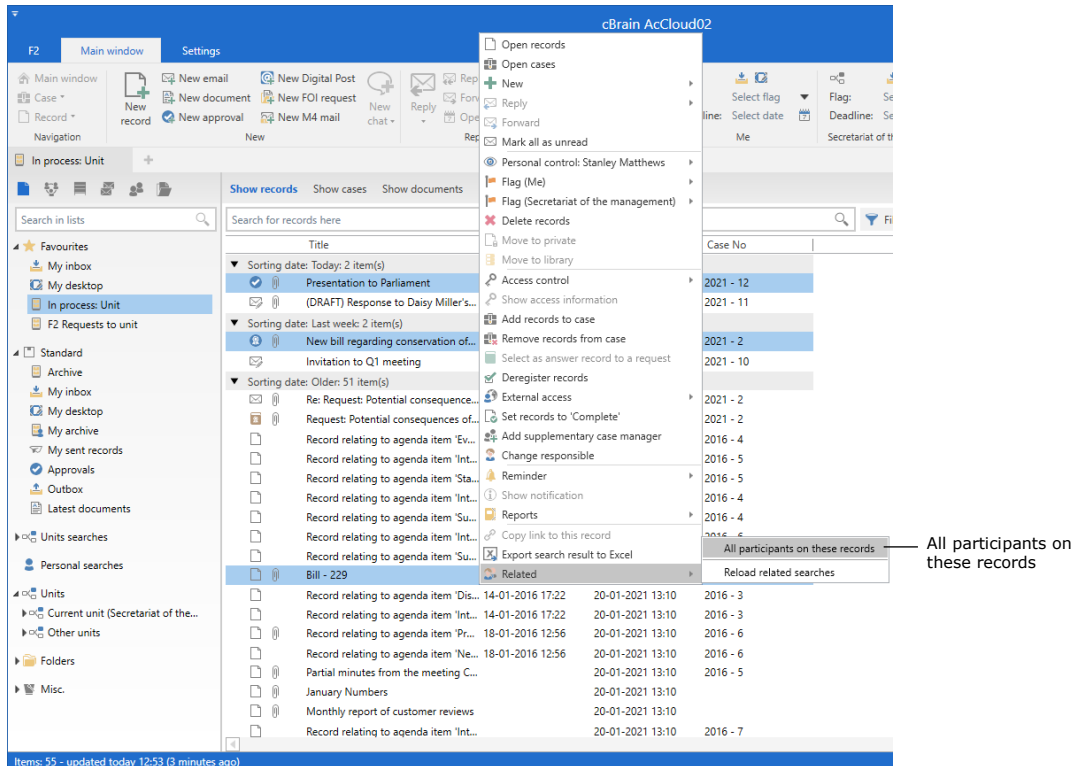
**Note:** In cooperation with cBrain, it is possible to create customer-specific searches. These searches are created and maintained via the Server file explorer (add-on module) and require the "Can edit related searches" role.

An example of a related search:

Stanley Matthews wants to see which participants have been involved in a number of records in his inbox.



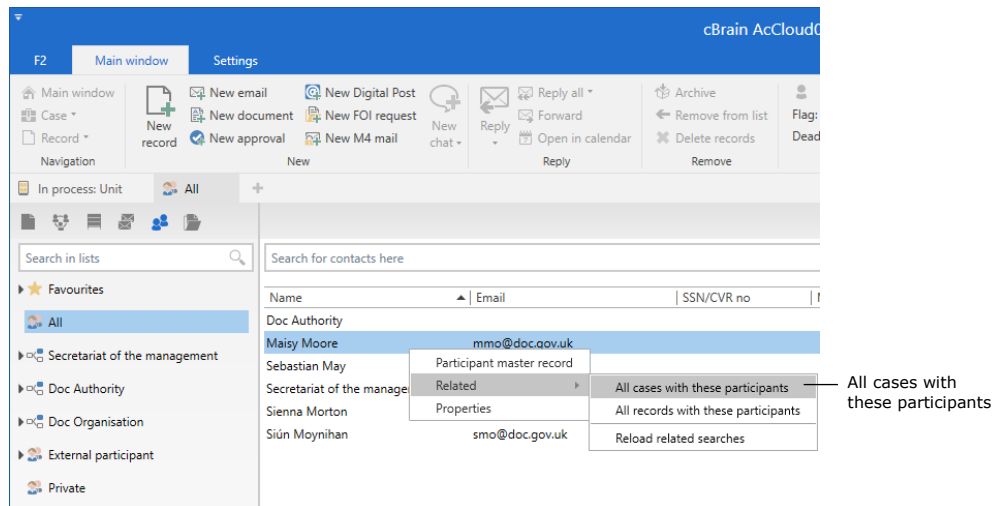
Stanley selects these records and right-clicks to open the context menu. Here he selects **Related** and then clicks on **All participants on these records**.



**Figure 44: Find all participants involved in the marked records**

F2 then opens the "All" participant register node on a new search tab in Stanley's main window. The search tab shows all participants involved in the records that he selected.

Now Stanley wants to narrow down his search. He wants to know in which cases the participant **Maisy Moore** has been involved. For this reason, Stanley selects "Maisy Moore" from the search results in the "All" search tab and right-clicks to open the context menu. He selects **Related** in the menu and clicks on **All cases with these participants**.

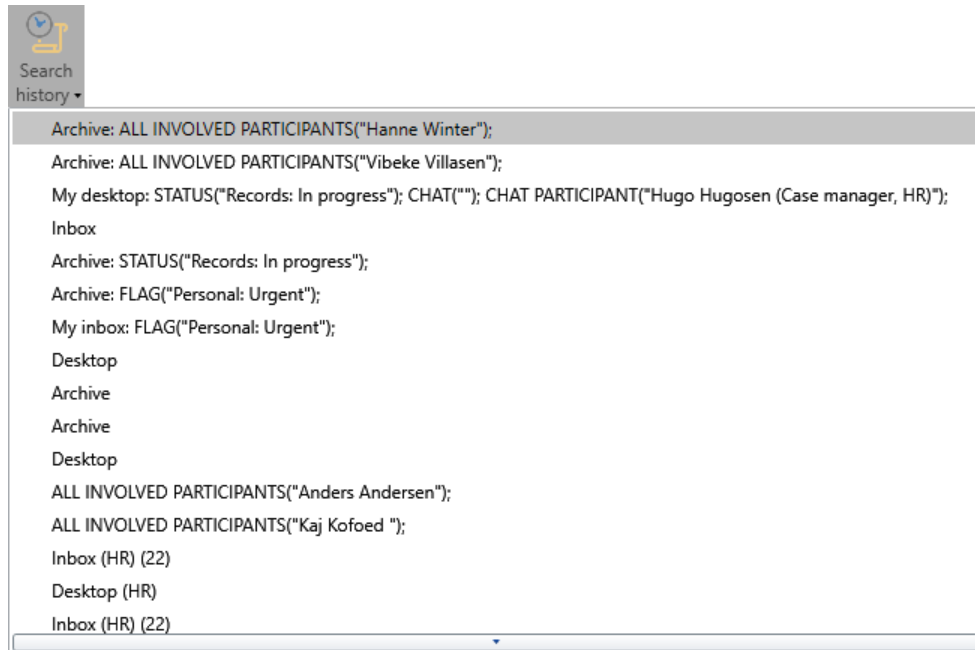


**Figure 45: Find all cases with the selected participants**

F2 opens a new search tab with the search results which shows all cases in which the participant “Maisy Moore” has been involved. Using related searches, Stanley can continue searching from records or cases to participants and from participants to records or cases.

## Search history

It is possible to view the most recent searches by clicking on the **Search history** menu item in the main window tab.



**Figure 46: "Search history"**

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