F2 Desktop

Searches

Version 9

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.

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, including record documents
    - Content
    - Title
    - External ID
- Participants
    - Email address
    - Name
    - Unit
    - Role
- Annotations
    - Annotation text
- The record metadata
    - 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.

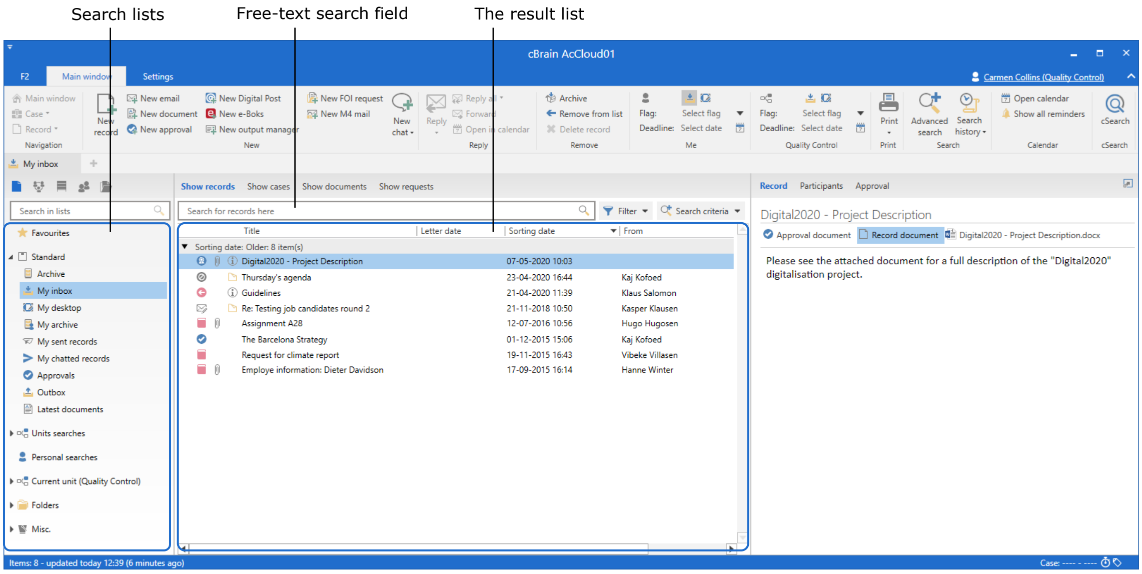

Figure 1: The free-text search field in the main window

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** (search). If the user has selected the "Archive" list, the search is performed throughout the entire archive. If the user selects another list, e.g. "My inbox" or "My archive", the search is 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 covers not only the "Archive", but also "My private records", the "Library", 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*.

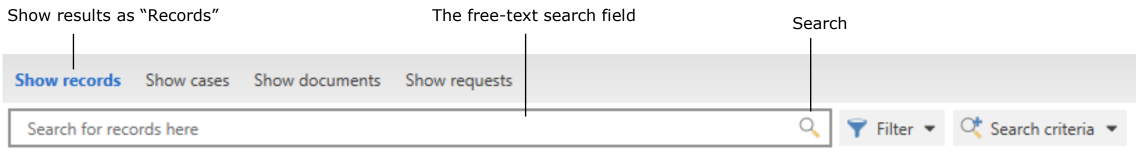

Figure 2: The free-text search field

Searches performed with the free-text search field search for complete words as a standard. For example, when entering the word *day* in the free-text search field and pressing **Enter** or clicking on the **magnifying glass**, 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**) before pressing **Enter** or clicking the **magnifying glass**. 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 uppercase 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 the search is in progress.

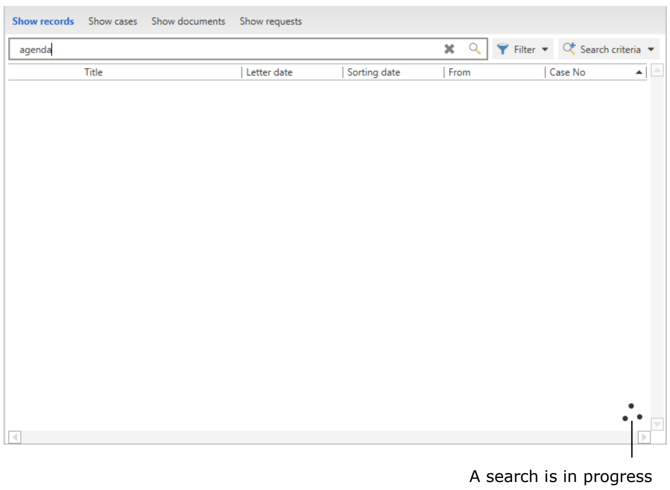

Figure 3: Search performed in the "Archive"

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**.

The "Filter" button

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

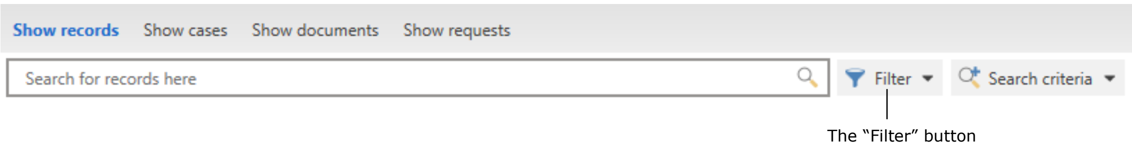

Figure 4: The main window "Filter" button

The additional filters available in the result list are "Unread", "With chats", "With documents", and "With flags" as shown below. The filters can only be used when the result list shows records.

Click **Filter** to view the filter options in a drop-down menu. Click a filter to activate it, and click again to deactivate it. Multiple filters can be active simultaneously, and active filters are marked with a green checkmark.

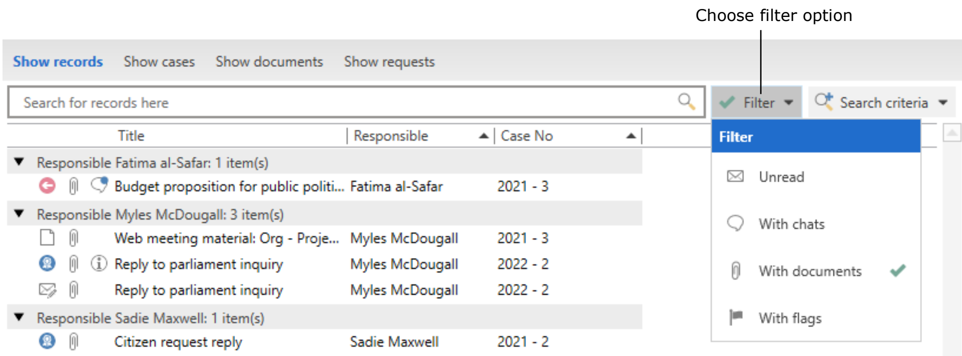

Figure 5: Filter options in the result list

The table below describes each search filter option.

Filter	Description
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 filters are also available when viewing the result list as cases. These filters along with the "Match" filter are used for filtering the record list underneath the result list. For more information, see the *Show cases* section.

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.

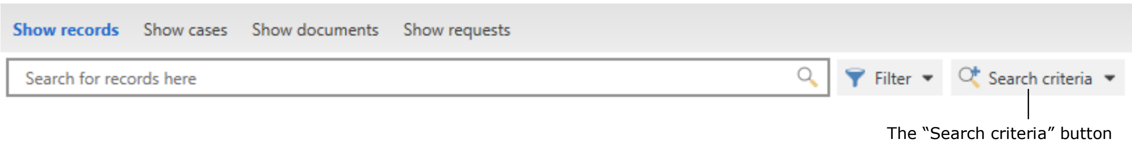

Figure 6: The main window "Search criteria" button

Whenever any search criteria are active, the magnifying glass icon changes 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 searches in the *Advanced searches* section.

Figure 7: Search criteria are active

Click **Search criteria** to open a drop-down menu with all active search criteria.

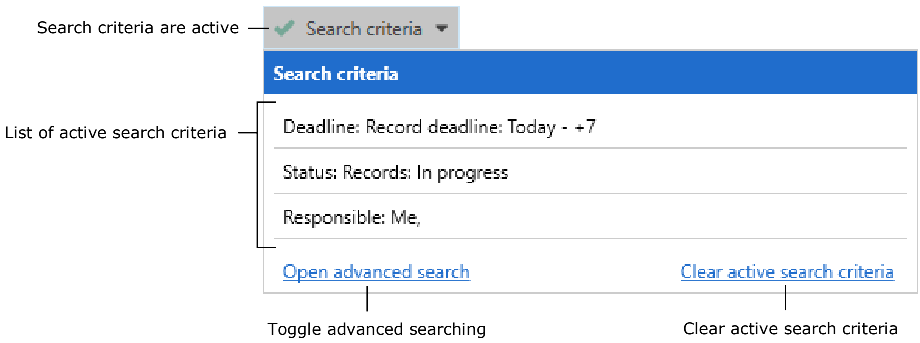

Figure 8: The "Search criteria" drop-down menu

From the drop-down menu it is also possible to navigate 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 or reentering said criteria. 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** cannot be used to search in folders.

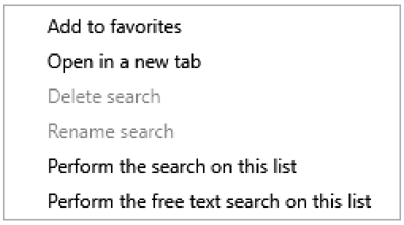

Figure 9: "Perform the search on this list" in the context menu

From the context menu, text from the free-text search field can be reused in a different list. Right-click the desired list and select **Perform the free text search on this list**. The new list opens with the desired text in the free-text search field and automatically performs a new search. 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.

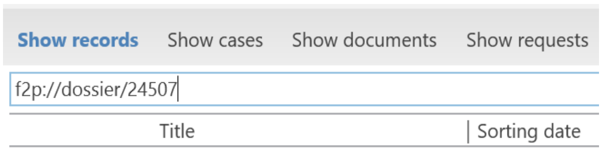

Figure 10: An example of an f2p link

> **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 (" ")
- Parentheses

F2 regards the list above solely as operators. It is not possible to perform searches that consist only of these symbols or 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 *

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, typing *day* in a search field will return any records that contain the word "day", but not records that, for example, contain the word "days".

> **Note**: It is only possible to use an asterisk as a suffix when searching, e.g. in *day**. Using * before or in the middle of a word will yield 0 search 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".

A searches with two words separated by a space 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 return records containing either word. This means that entering *minister OR department* will return all records containing either "minister" or "department".

Using *OR*, F2 will search for records whose content, record title, or case title contains one or 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 both "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 are excluded from 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. More precise and useful searches can be made by searching 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.

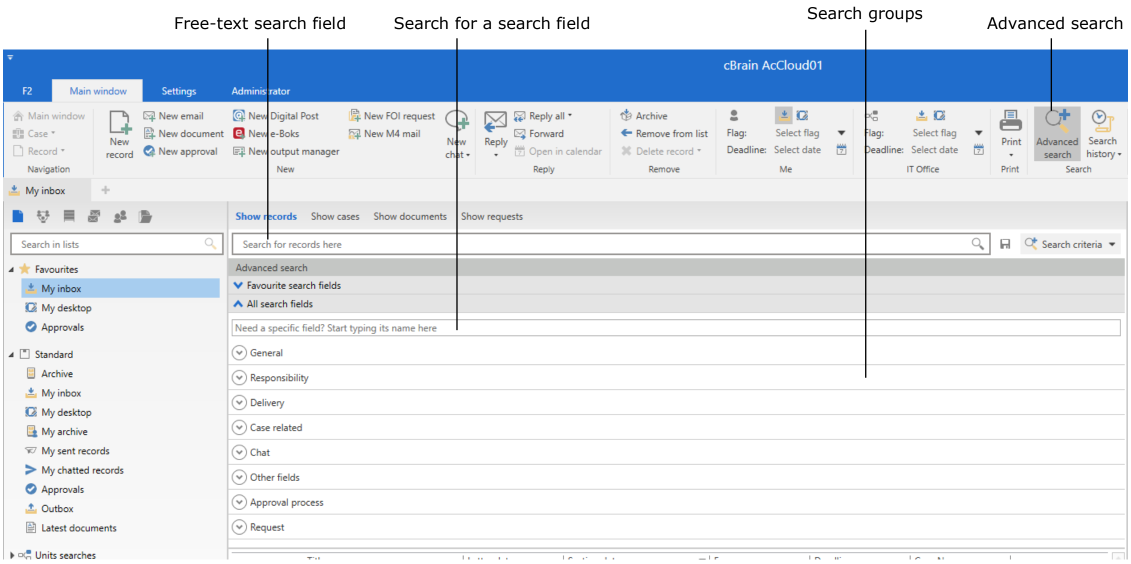

Figure 11: Advanced search

The height of the search field area is adjustable, making it possible to adjust the visibility of the result list. Click and drag the splitter between the search field area and the result list to the desired location.

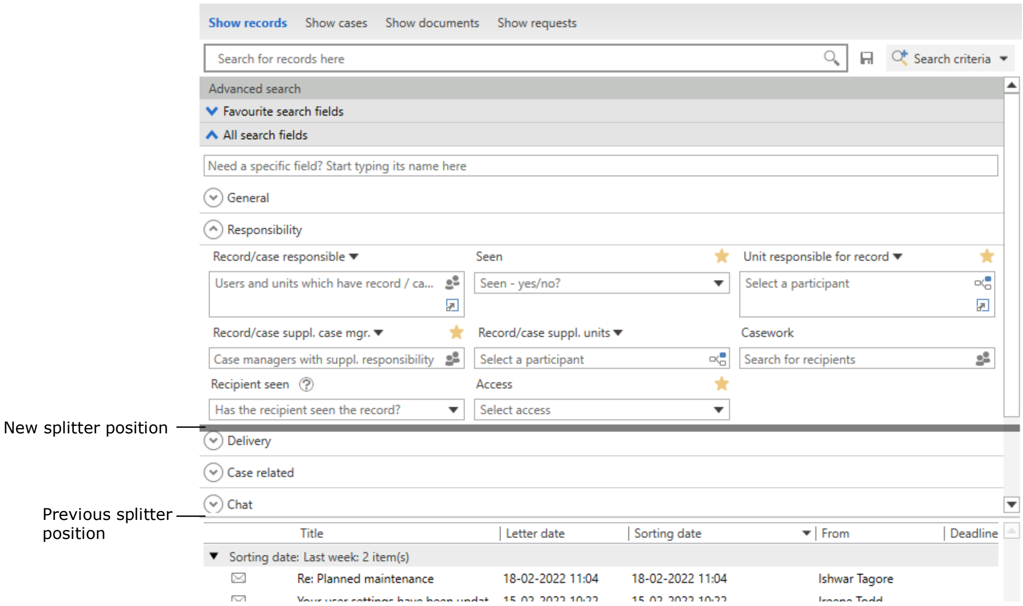

Figure 12: Drag and drop the splitter to the desired location

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.

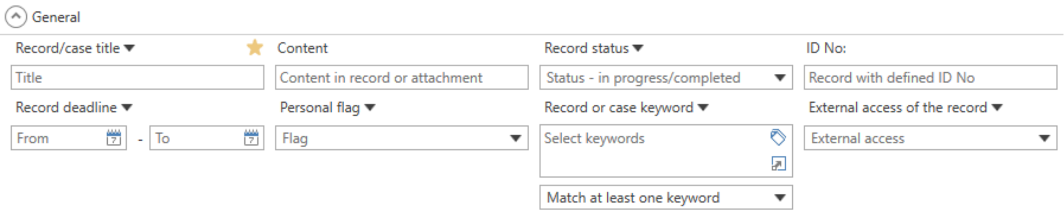

Figure 13: The "General" search group

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

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

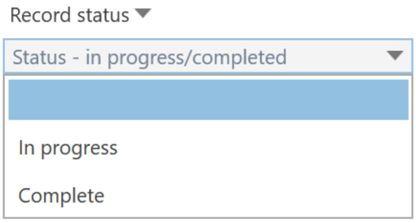

Figure 14: Search options for the "Record status" field

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.

An additional drop-down menu is available on search fields for keywords and participants on records and cases. Specifically, the search fields "Record or case keyword" in the "General" group" and "Record/case participants" in the "Case related" group. When multiple keywords or participants have been entered, the drop-down makes it possible to search for results matching either at least one or all of the search terms.

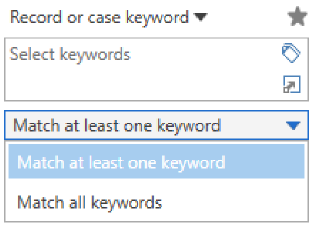

Figure 15: Field with a drop-down operator

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 filled in search criteria from the search fields before a new 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 at least one field in a search group is filled in, the group's title is bolded. This makes it easier to determine if fields are filled in when the groups are collapsed.

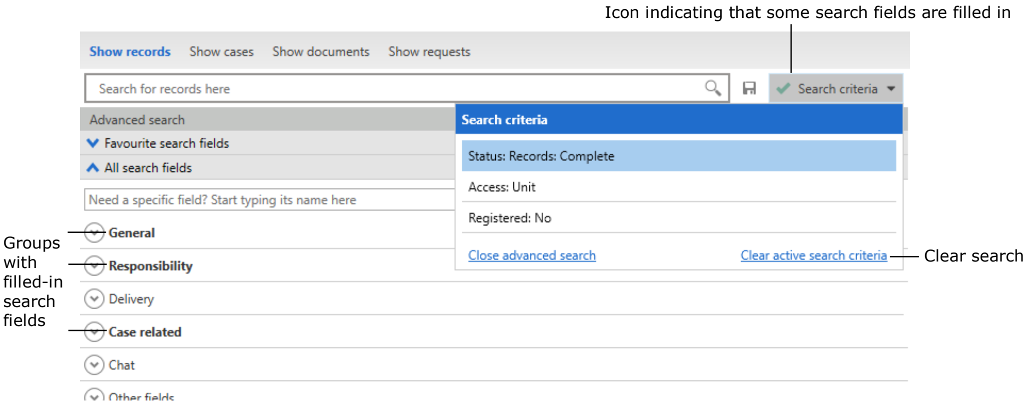

Figure 16: Search field groups

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 **Search criteria** icon makes it possible to see if any search fields are filled in even when they are hidden by deactivating **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 free-text search fields. For more information on the available search operators, see the *Search using operators* section.

The metadata fields of each group are presented below.

The "Favourites" search group

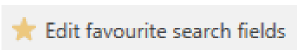

Figure 17: Menu item "Edit favourite search fields"

Users can create a search group with their personal 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.

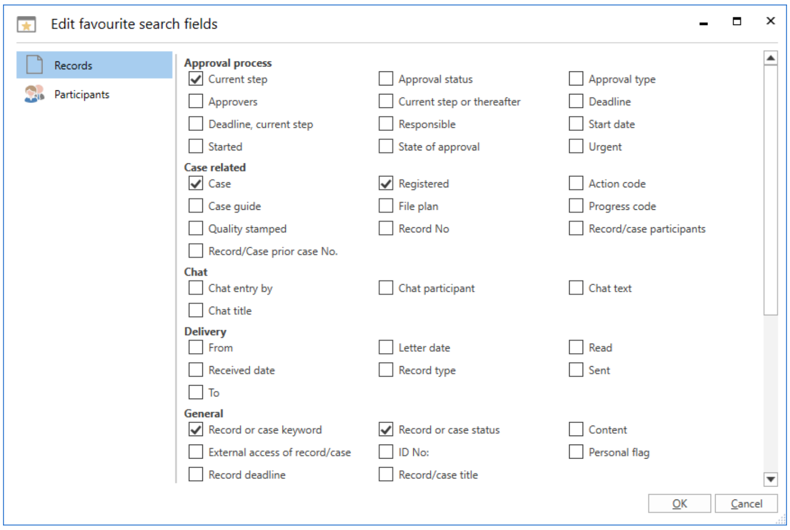

Figure 18: "Edit favourite search fields"

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

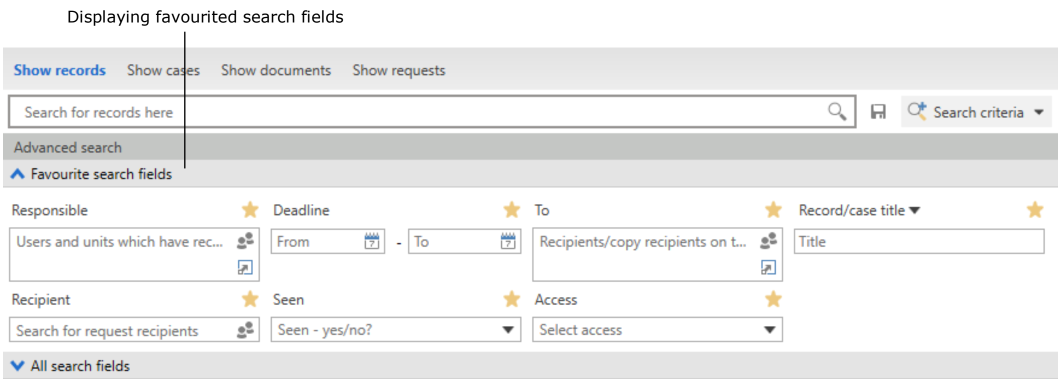

Figure 19: Example of the "Favourites" search group

Search fields can be added 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

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

Search field	Possible values	Description
"Record/case title" "Record title" "Case title" "Current record title"	Search string	A search is performed for records or cases whose title contains the search string. "Record/case title": • Search for the current record or case title. • For email records, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email record. "Record title": • Search for the current record title. • For email records, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email record. "Case title": • Search for the case title. "Current record title": • Search for the record's current title only. **Note**: The search field "Current record title" is only displayed if it has been enabled in cooperation with cBrain.
"Content"	Search string	Search for records with attachments whose content matches the search string.

Search field	**Possible values**	**Description**
"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.
"Record deadline" "My deadline" "Unit deadline" "Deadline, unit casework" "Case deadline" "Record or case deadline"	Date *Yesterday* *Today* *Tomorrow* *Undefined* *+ [No. of days]* *- [No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Records and/or cases whose deadline is within the specified interval. Records and/or cases with the user's personal deadline within the specified interval. Records and/or cases with the unit's case management within the specified interval. Records and/or cases with the unit's deadline within the specified interval.
"Personal flag" "Unit flag"	Flags	Search for records with the specified flag. Flags are defined via a value list by a user with the "Flag administrator" privilege.
"Record or case keyword" "Record keyword" "Case record"	A certain keyword. A keyword within a specific subject. A keyword or subject which contains a specific text.	Search for keyword(s) specified on the record or case. Makes it possible to create lists based on a certain keyword. Use the drop-down menu to search for results matching either at least one or all entered keywords.
"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 F2 External Access add-on module.

The "Responsibility" search group

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

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 responisble for record" "Unit responsible for case"	Responsible unit *My unit*	Search for records/cases for which the specified unit is responsible. *My unit* 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 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.
"Record/case suppl. units" "Record suppl. units" "Case suppl. units"	Unit *My unit*	Works as the preceding search, except this search is for records and cases for which a unit is set as

Search field	Possible values	Description
		supplementary case manager.
"Case work"	User Unit *Me* *My unit*	Search for records for which the specified unit/user is specified in the unit registration line. **Note**: Searching for a specific unit will yield both results for said unit as well as results for individual users in the unit.
"Recipient seen"	*All* *Some* *Not all* *Nobody*	This field makes it possible to sort a search based on whether the recipient(s) has/have seen the record/email. **Note**: Only applies to the unit casework line in the record's metadata.
"Access"	*Involved* *Unit* *All*	Search for records by the specified access level.

The "Delivery" search group

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

Search field	Possible values	Description
"From"	User Unit Participant Email address *Me* *My unit*	Search for emails sent by the specified participant, user or unit.

Search field	Possible values	Description
		Note: 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.
"To"	User Unit Participant Email address *Me* *My unit*	Search for emails received by the specified participant, user or unit. **Note**: 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.
"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 *Yesterday* *Today* *Tomorrow* *Undefined* + *[No. of days]* - *[No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for a date or an interval within which an email has been received.

Search field	Possible values	Description
"Letter date"	Date *Yesterday* *Today* *Tomorrow* *Undefined* *+ [No. of days]* *- [No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Similar to the "Received date" field. This search is for date of letter and not by date of receipt.

The "Case related" search group

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

Search field	Possible values	Description
"Case"	Search string Number *Defined* *Undefined*	F2 automatically suggest case titles when the user starts typing in this field. A case can also be selected via the case icon. Searching for *Defined* will display records added to any case. Searching for *Undefined* will display records not added to a case. The search terms *Defined* and *Undefined* are especially useful when combined with other search criteria.
"Registered"	*Yes* *No*	Search for cases attached to records based on whether they have been registered.
"Record No"	Number *Undefined*	A record is automatically assigned a number when it is on a case that is registered.

Search field	Possible values	Description
"Record/case prior case No." "Record, prior case No." "Case, prior case No."	Number *Undefined*	Search for records or cases via a previous case number.
"Record/case participants" "Record participants" "Case participants"	Users Units External participants *Me* *My unit*	Search for cases in which the specified users/units/external participants are involved. Use the drop-down menu to search for results matching either at least one or all entered keywords.
"Journal plan"	Values in the journal plan list, set up by an administrator	Search for cases matching the specified journal plan.
"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

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

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.

		Note: 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. **Note**: Search results will only include chats in which the user performing the search is a participant.

The "Other fields" search group

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

Search field	Possible values	Description
"Record or case created by" "Record created by" "Case created by"	User *Me*	Search for records/cases created by the specified user.
"Record or case created" "Record created" "Case created"	Date *Yesterday* *Today* *Tomorrow* *Undefined* + *[No. of days]* - *[No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for records and/or cases created within the specified interval.
"Access limitation on record/case" "Access limitation on record" "Access limitation on case"	User Unit Security group Team *Me*	Search for records and cases with an access limitation.

Search field	Possible values	Description
	My unit	
"SSN/CVR No of record/case" "SSN/CVR No of record" "SSN/CVR No of case"	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 *Me* *My unit*	Search for documents and/or cases with the specified user/unit/external participant as a participant involved in the record/case.
"External case ID"	Number	Search for records with the specified external case ID.
"Standard-search"	Predefined searches in F2.	Predefined searches are available in this field.
"Reminder date"	Date *Yesterday* *Today* *Tomorrow* *Undefined* + *[No. of days]* - *[No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. 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)

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

Search field	Possible values	Description
"Responsible"	User Unit *Me*	Search for approvals for which the specified user or unit is responsible.

Search field	Possible values	Description
	My unit	
"Approvers"	User Unit *Me* *My unit*	Search for approvals for which the specified user or unit is an approver.
"Current step"	User Unit *Me* *My unit*	Search for records with the specified approver for the current approval step.
"Current step or thereafter"	User Unit *Me* *My unit*	Search for records with the specified approver for either the current or a pending approval step.
"Deadline"	Date *Yesterday* *Today* *Tomorrow* *Undefined* + *[No. of days]* - *[No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for approvals with deadlines within the specified interval.
"Deadline, current step"	Date *Yesterday* *Today* *Tomorrow* *Undefined* + *[No. of days]* - *[No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for approvals with current step deadline within the specified interval.
"Start date"	Date *Yesterday* *Today* *Tomorrow*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today.

Search field	Possible values	Description
	Undefined *+ [No. of days]* *- [No. of days]*	Search for approvals that have been initiated during the specified interval.
"Urgent"	*Yes* *No*	Search for approvals with or without urgent status.
"Approval type"	Value list created by an administrator.	Search for approvals of the specified type.
"Started"	*Yes* *No*	Search for approvals that either have or have not been initiated.
"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)

Above certain search fields is a drop-down menu for adjusting the search field. The "Search field" column in the table below lists all options available for each search field. If a search field accepts specific predefined values, the "Possible values" column displays these values italicised.

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 *Yesterday* *Today* *Tomorrow* *Undefined*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today.

Search field	Possible values	Description
	+ [No. of days] *- [No. of days]*	Search for requests with a specific deadline.
"Internal deadline"	Date *Yesterday* *Today* *Tomorrow* *Undefined* *+ [No. of days]* *- [No. of days]*	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for requests with a specific internal deadline.
"Description"	Search string	Search for requests whose description contains the specified search string.
"Recipient"	User Unit *Me* *My unit*	Search for requests sent to the specified user/unit.
"Executor"	User 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.

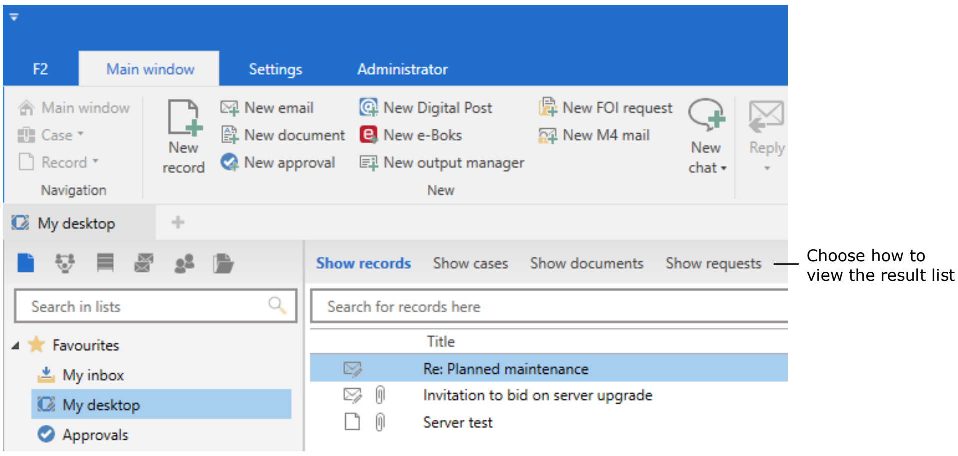

Figure 20: View the result list as records, cases, documents, or requests

Note: Not all records are associated with a case. This means that viewing the result list as either records or cases affects which records are shown. In the “Show cases” view, the result list shows cases, and a secondary list of the selected case’s records is shown below. In this view, records without a case association are not 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.

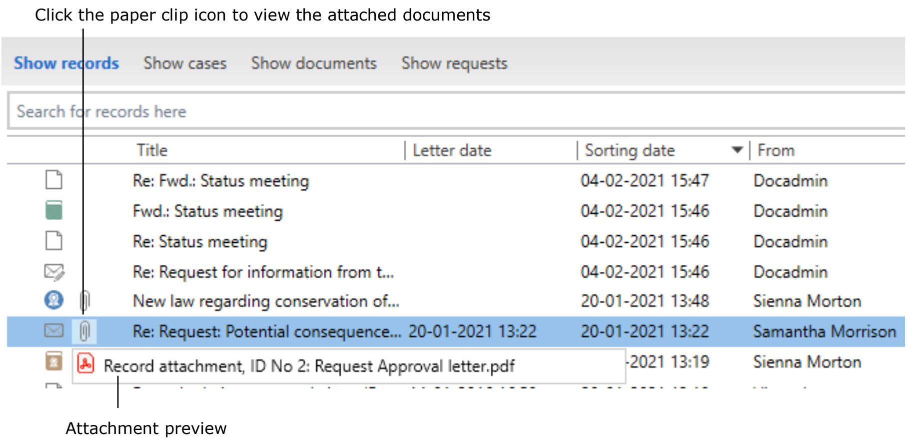

Figure 21: View records with attached documents

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.

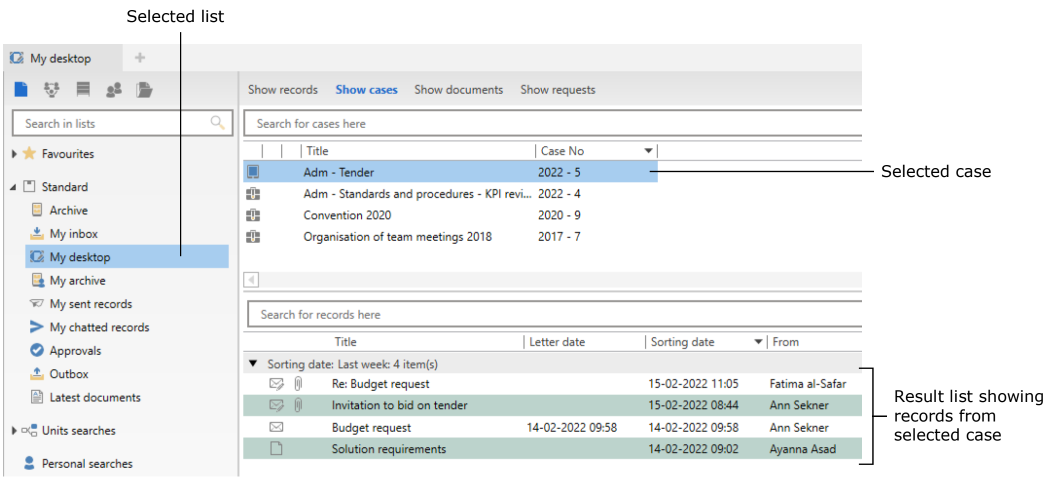

Figure 22: Case and records lists displayed in the result list

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*.

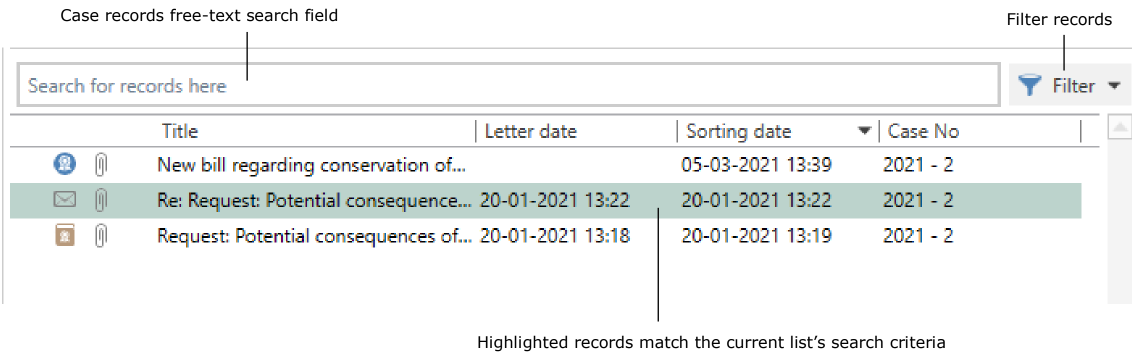

Figure 23: The records on the selected case

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 "Unread", "With chats", "With documents", and "With flags", and in this view also offers filtering by "Match". Select "Match" to only see the records that match the list's search criteria.

Read more about the button in *The "Filter" button* section.

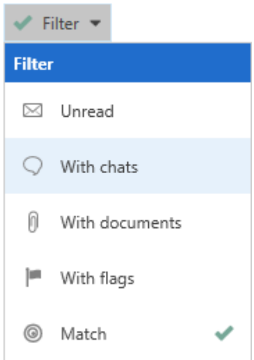

Figure 24: The "Match" filter

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.

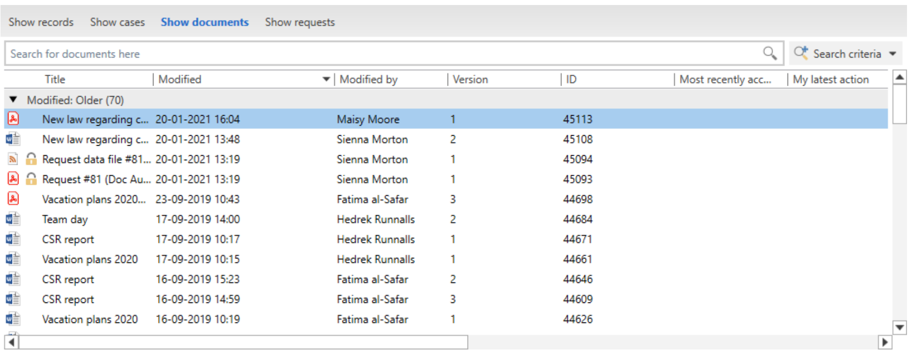

Figure 25: Show documents in the result list

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.

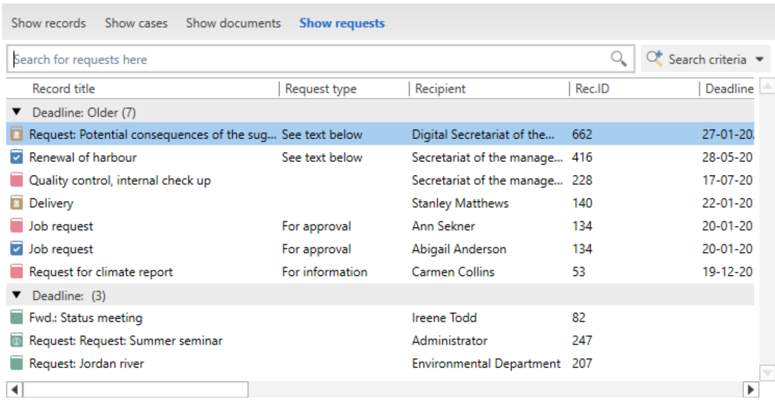

Figure 26: Display requests in the result list

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 saves which column a given list was last sorted by. All lists are individually sorted and saved.

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
Approval process	
"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.
Case	
"Case No"	Shows the number of the case on which a record is located. **Note**: 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. **Note**: 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. **Note**: 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.
Deadline	
"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".
Delivery	
"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. **Note**: 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. **Note**: 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. **Note**: 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: • Record • Email • Request • Approval • Digital Post • e-Boks • Remote print See *F2 Icon Appendix* for more information about the icons and their variations.
"Message icon"	Shows the icon for: • Chat • Note • Annotation • Orientation 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.
"Reminder icon"	Shows whether there is a reminder on a record.

Column	Description
"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 intended to be shown to the left of the "Title" column, making the arrow icon point to the relevant record.
Record	
"Sorting date"	Displays when a record has been placed in a user's personal lists such as "My desktop", "My inbox" and "My archive". 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. 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. **Note**: 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.
"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"	Shows whether the record is located in: • "Archive" • "Library" • "My deleted records" • "My private records".
"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"	Displays the user who has deleted the request.

Column	Description
	Note: This column only contains values if the chosen list is either "My deleted records" or "Search all over".
"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: • Open • Partially open • Closed. **Note**: This setup can be customised and may vary from organisation to organisation.
"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. **Note**: "Latest update" should <u>not</u> be confused with "Sorting date".
"Locked"	Displays whether a case is included in the periodic delivery to the National Archives. **Note**: 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.
"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.

Column	Description
"Record number"	Displays the consecutive number allocated to a record when it has been registered. **Note**: A record that is registered has only one record number. The record number should not be confused with the record ID.
"Record type"	Shows whether the record is: • "Internal" – i.e. available to internal users • "Incoming" – i.e. received from external participants • "Outgoing" – i.e. sent to external participants
"Registered"	Shows whether a record has been registered. **Note**: This column is empty if the record's "Registered" field has not been filled in.
"Remind Date"	Displays the date set by a user for management purposes. **Note**: The reminder date does not pop up as a reminder but can be used as a basis for searching or sorting lists.
"SSN/CVR No"	Shows the SSN/CVR number a user has written in the record.
"Status"	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.
"Suppl. case mgr."	Shows the supplementary case managers on a record.
"Version No"	Shows the version number of the record.
Requests	
"Request"	Shows whether there is a request on a record.
"Request completed"	Shows whether the record's request has been marked as completed.
"Request created by"	Displays the user who created the request.
"Request deadline"	Displays the deadline for the request set by the creator.

Column	Description
“Request execution date”	Displays when a request was executed.
“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: • Sent • Accepted • Cancelled • Executed • Completed
“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. **Note**: 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.
Responsibility	
“Responsible”	Displays the user or unit responsible for the record.
“Responsible unit”	Displays the unit responsible for the record. **Note**: 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. **Note**: 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 *F2 Icon Appendix*.
"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. **Note**: 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: • Open • Partially open • Closed. **Note**: 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. **Note**: 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: • "Internal" – i.e. available to internal users • "Incoming" – i.e. received from external participants • "Outgoing" – i.e. sent to external participants.
"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 *F2 Icon Appendix*.
"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. **Note**: 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.

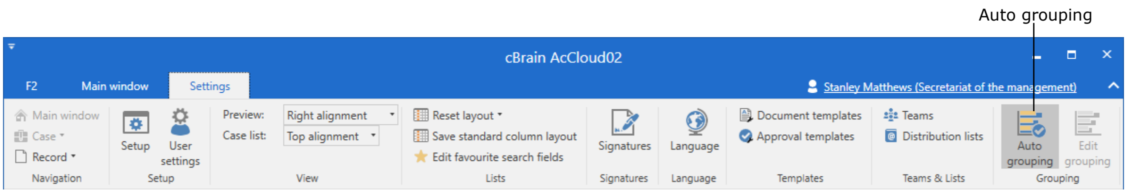

Figure 27: "Auto grouping" in the "Settings" tab

If its menu item is highlighted, **Auto grouping** is enabled.

Figure 28: "Auto grouping" enabled

If its menu item is not highlighted, **Auto grouping** is disabled.

Figure 29: "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.

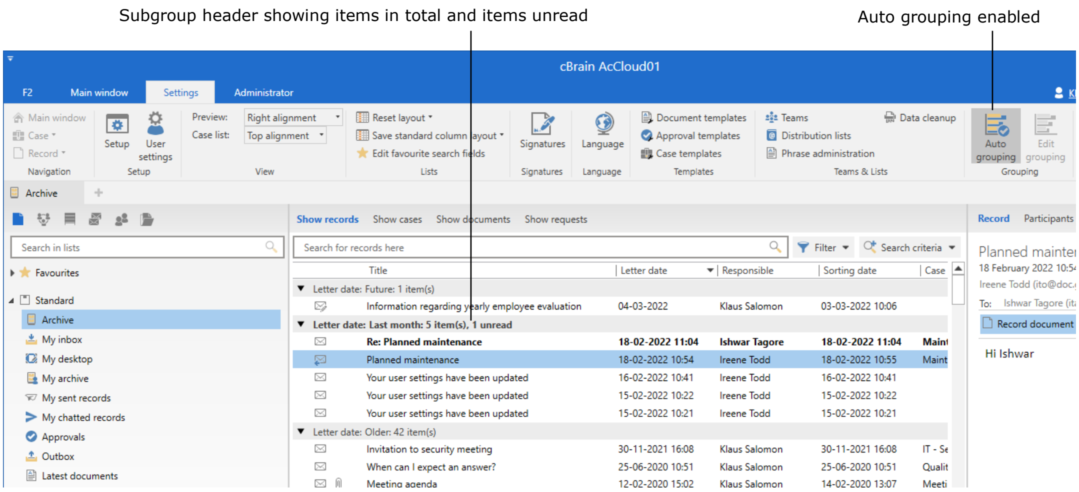

Figure 30: Auto grouping enabled in the main window

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.

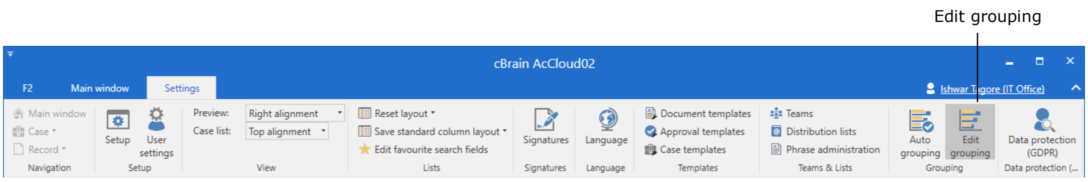

Figure 31: "Edit grouping" in the "Settings" tab

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

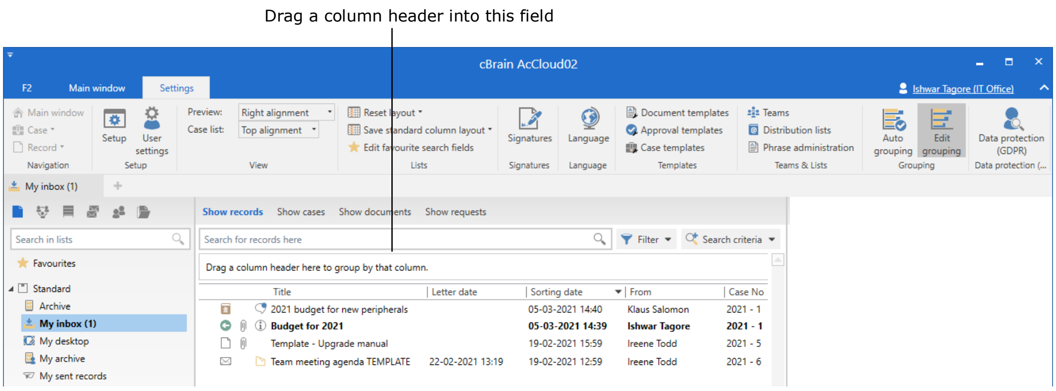

Figure 32: The grouping area

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

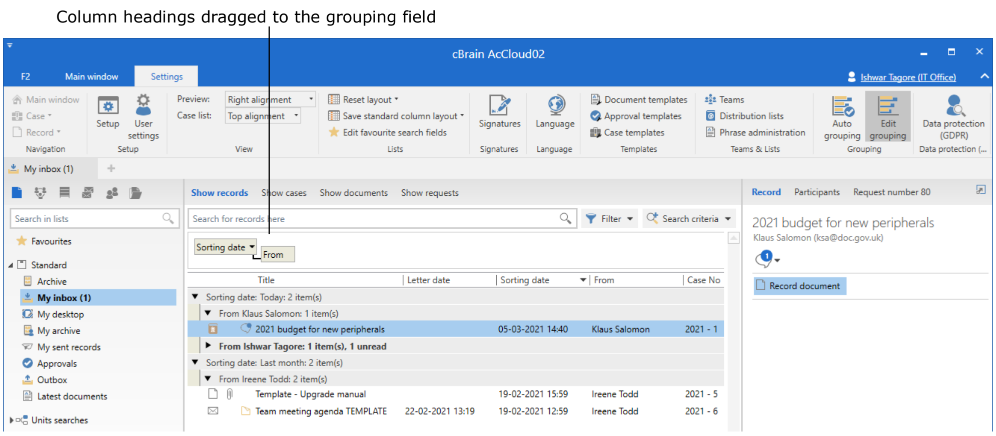

Figure 33: User-created folder structure

Note: Grouping into two levels is possible by dragging an additional column headline 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: A user-created grouping hierarchy is 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 searching is enabled.

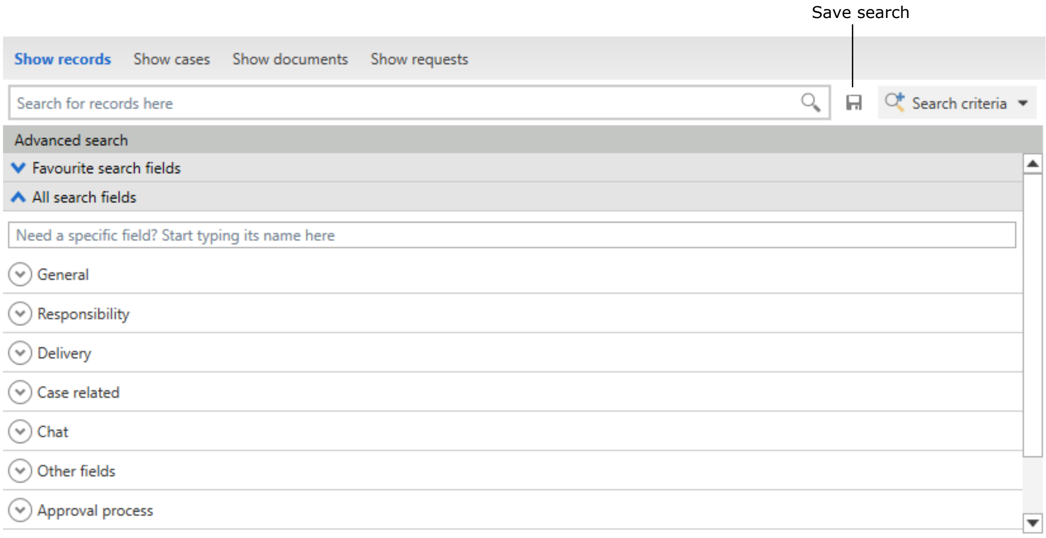

Figure 34: Save search

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

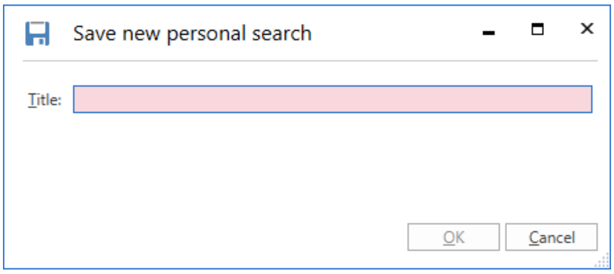

Figure 35: To save a search, enter a title

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.

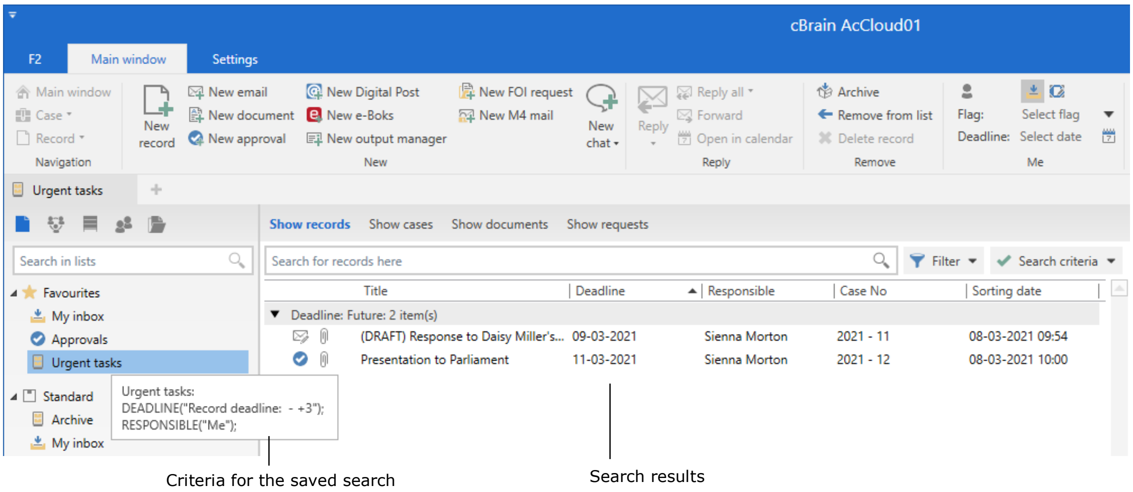

Figure 36: A saved search as a list

Personal searches, also called personal lists, are displayed under the “Personal searches” node in the list view. The icon to the left of a personal search indicates where the list performs its search, which includes standard searches, unit lists and lists from the “Misc.” node.

The icons correspond to the lists as follows:

- Archive
- My inbox
- My desktop
- My archive
- My sent records
- My chatted records
- Approvals
- Outbox
- Latest documents
- Inbox (Unit)
- Desktop (Unit)
- Archive (Unit)

My private records

My deleted records

Library

Search all over

Figure 37: 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.

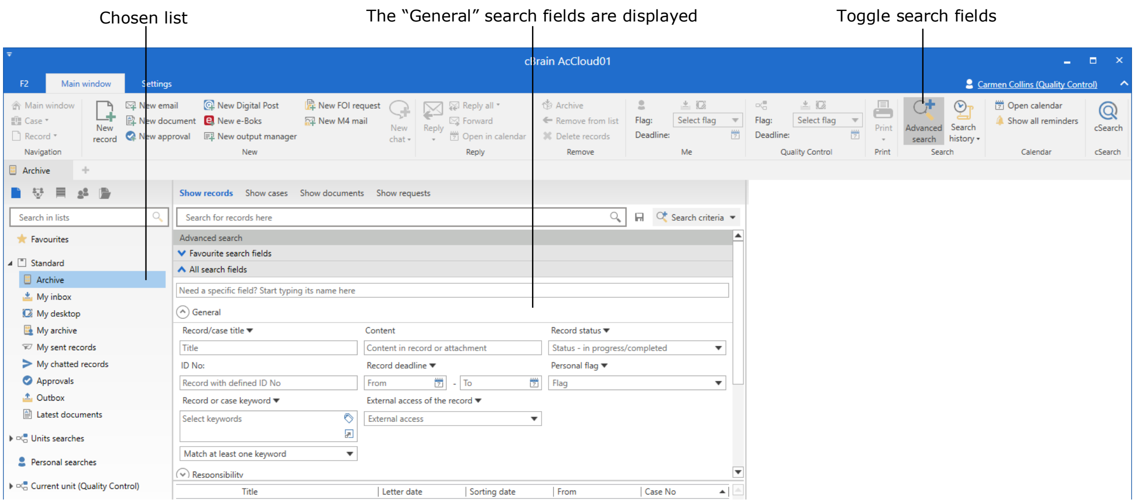

Figure 38: Search fields displayed in the result list

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 select 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".

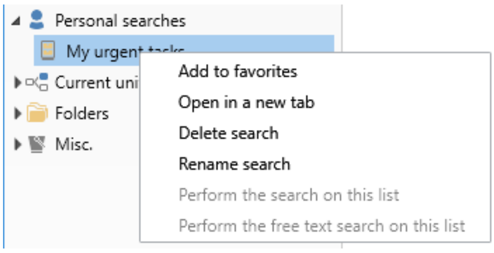

Figure 39: Delete or rename a personal search

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.

Access the participant register

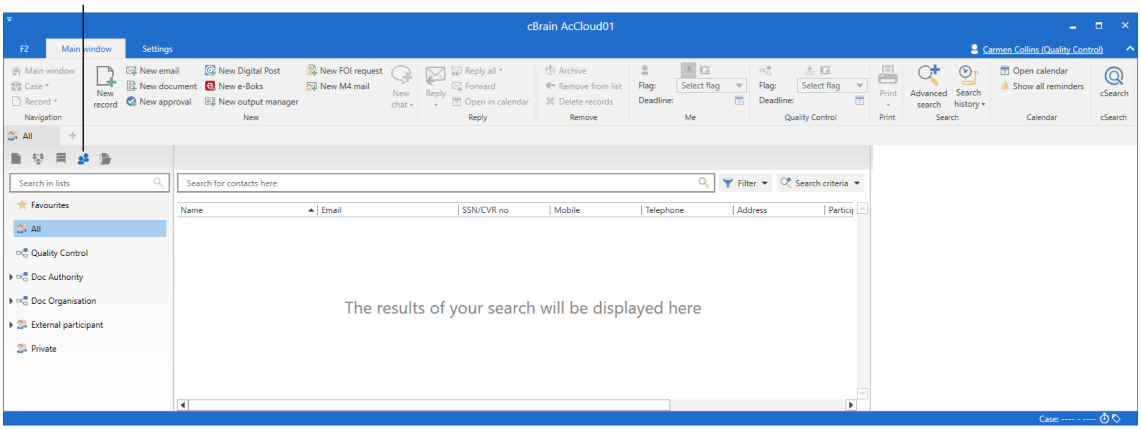

Figure 40: Access the participant register from the main window

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** (search) 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 clicking 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.

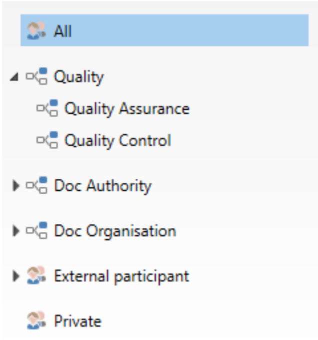

Figure 41: Nodes of the participant register

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.

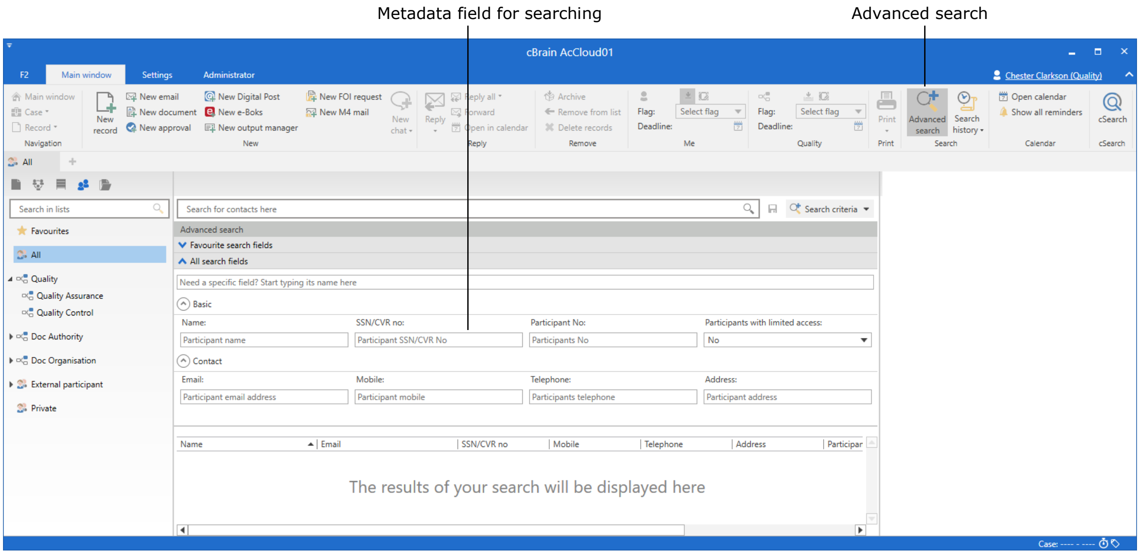

Figure 42: Use metadata fields to search for participants

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.

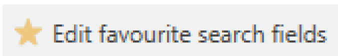

Figure 43: Menu item "Edit favourite search fields"

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.

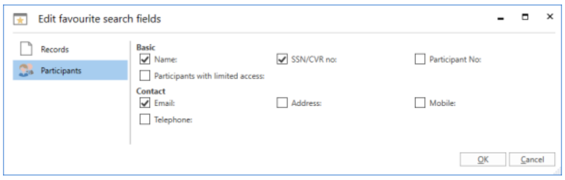

Figure 44: "Edit favourite search fields" - participants

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

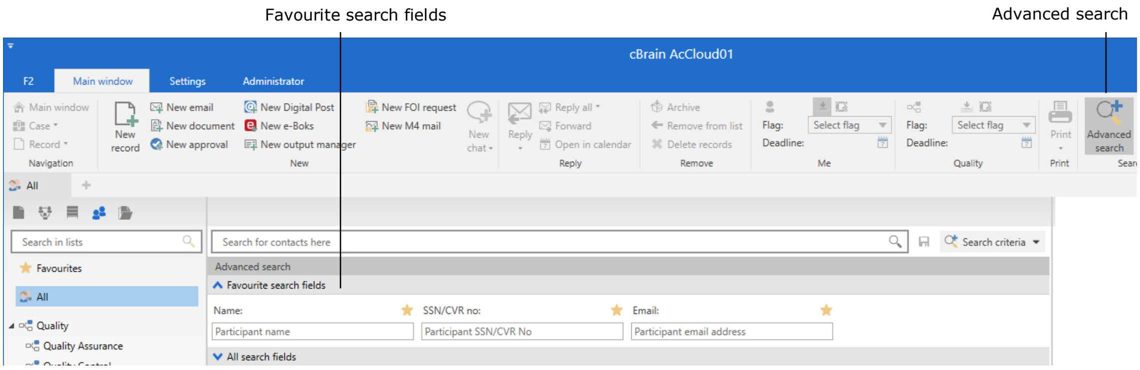

Figure 45: Access favourite search fields in the participant register

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.
"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.

Search field	Possible values	Description
"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. The button is described in *The "Filter" button* section.

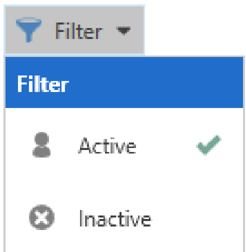

Figure 46: Participant register filter options

The table below describes each filter option.

Filter	Description
Active	Shows all active participants in the participant register.
Inactive	Shows all inactivate 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**.

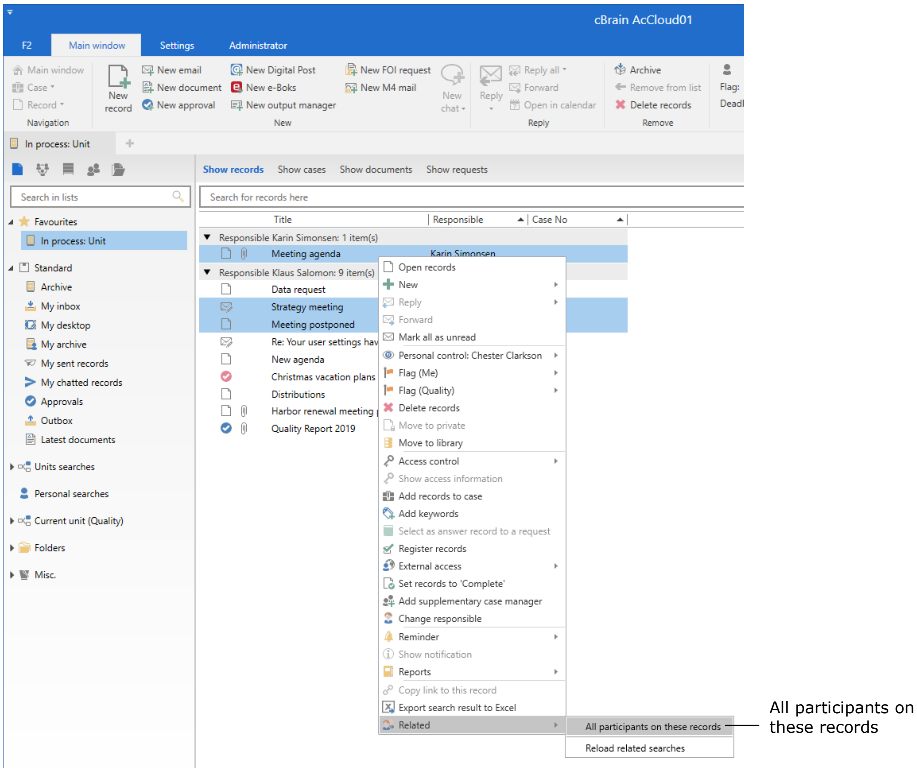

Figure 47: Find all participants involved in the marked records

F2 then opens the “All” node in the participant register 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 participants Alya Qaimkhani and Charlie Carter have been involved. For this reason, Stanley selects them 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**.

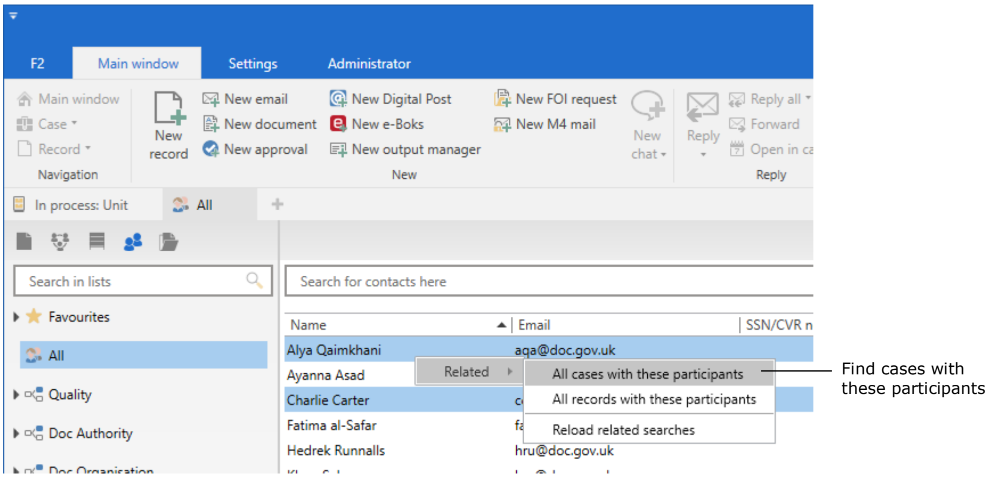

Figure 48: Find all cases with the selected participants

F2 opens a new search tab with all cases in which the participants “Alya Qaimkhani” and “Charlie Carter” have 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.

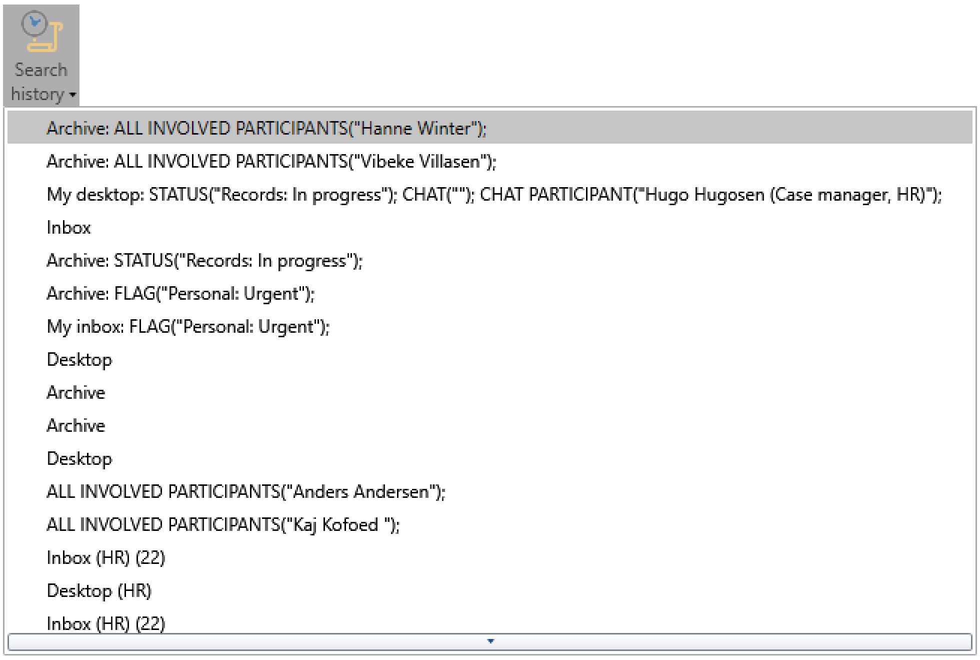

Figure 49: "Search history"

List of Figures