F2 Desktop

Settings and Setup

Version 9

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Welcome to cBrain F2

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

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

Reading instructions

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

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

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

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

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

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

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

Additional documentation for F2 Desktop

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

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

F2 add-on modules

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

Examples of cBrain's add-on modules include:

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

Settings and setup

It is possible to adjust F2 according to preference in regard to both functionality and layout. For example, it is possible to regulate how to:

- Display the preview of records, cases, documents and emails in the main window.
- Display the access level that is given to users who are added as supplementary case managers, etc.

In the following section the settings and setup possibilities are presented with the intention of providing an understanding of the possibilities that F2 offers and how to adjust the settings.

The "Settings" tab in the main window is used to adjust and set up F2. Each user can choose from a number of options concerning F2's behaviour as well as change the appearance of the main window.

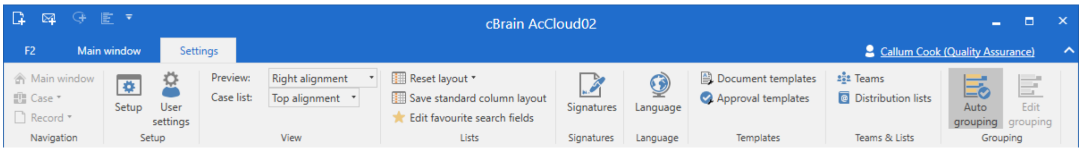


Figure 1: The "Settings" tab

The individual areas under "Settings" will be examined in the following pages.

Setup of personal user settings

The different tabs of the "Setup" dialogue will be discussed in the following sections. To open the "Setup" dialogue, click on **Setup** on the "Settings" tab in the main window.

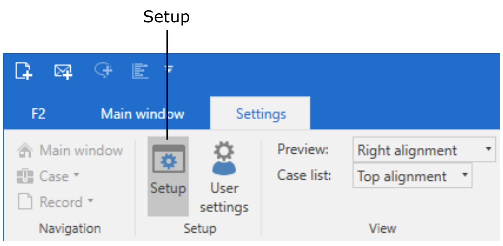


Figure 2: "Setup" on the "Settings" tab

The "General" tab

To change the general settings of F2, click on **General** in the "Setup" dialogue as shown below.

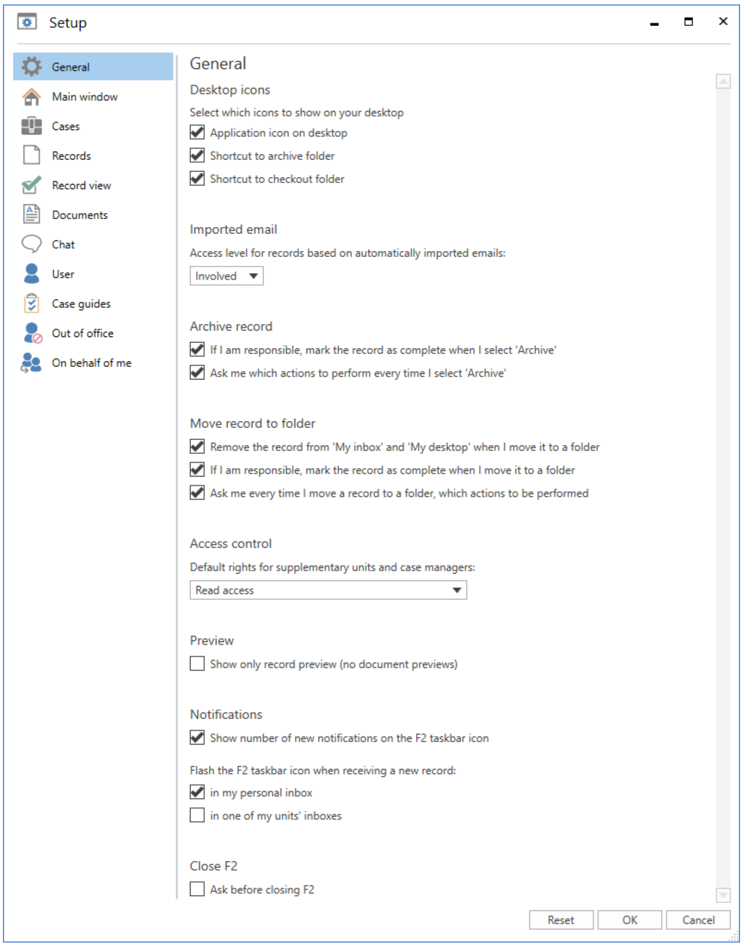
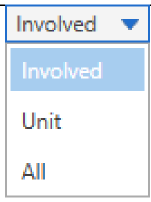
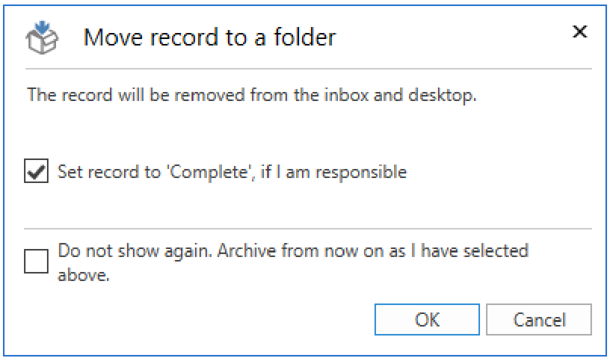


Figure 3: "General" setup

The general setup options are described below.

Function	Description
"Desktop icons"	The following icons can be added to or removed from the computer's desktop: • The F2 programme icon. • A shortcut to the "Archive folder" (i.e. the folder for importing files to F2). • Shortcut to the "Check out folder" (i.e. the folder in which the user can place documents for offline work and check back into F2). Read more in *F2 Desktop – Records and Communication.*
"Access level for records based on automatically imported emails"	Here it is possible to determine which access level F2 assigns to imported emails.

Function	Description
	 **Figure 4: Access levels for imported emails** Choose between the following options: • "Involved" • "Unit" • "All". **Note**: The default access level is "Involved". It can be an advantage to set the access level to "Unit". This way, if a user is not present, the colleagues in the unit are still able to search for emails intended for the unavailable user.
"If I am responsible, mark the record as complete, when I select 'Archive'"	Tick this box to automatically set the record as complete when archived if the user is responsible for the record.
"Ask me which actions to perform every time I select 'Archive'"	Tick this box to automatically open the dialogue below when clicking **Archive**.  **Figure 5: The "Move record to a folder" dialogue**
"Remove record from 'My Inbox' and 'My Desktop' when I move it to a folder"	Tick this box to automatically remove the record from "My Inbox" and "My Desktop" when the record is moved to a folder.
"If I am responsible, mark the record as 'Complete' when I move it to a folder"	Tick this box to automatically set the record to complete when moved to a folder if the user is responsible for the record.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Ask me every time I move a record to a folder, which actions to be performed”</td><td>
Tick this box to automatically open the dialogue below when moving a record to a folder.

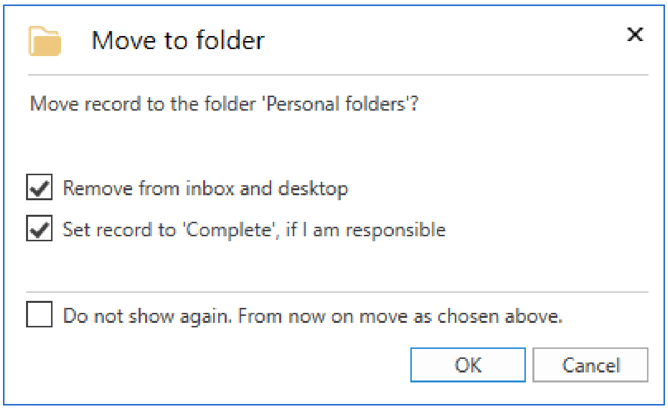


Figure 6: The “Move to folder” dialogue
</td></tr>
<tr><td>“Default rights for supplementary units and case managers”</td><td>
Choose one of the following access rights for supplementary units or users when they are added to a record:

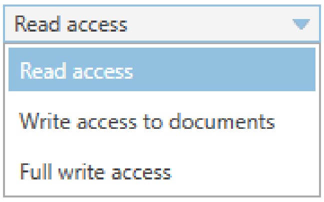
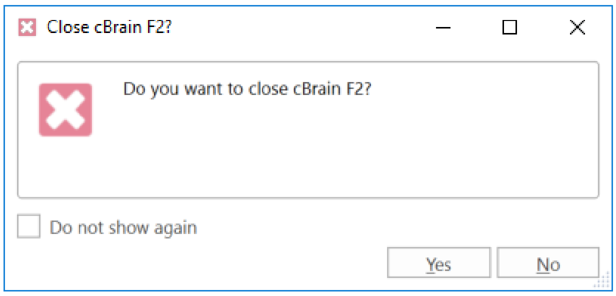


Figure 7: Select access rights

There are three types of access rights:

- “Read access”: The supplementary unit or case manager only has read access to the record.
- “Write access to documents”: The supplementary unit or case manager has write access to any attached documents on the record (including the record document), but NOT to the record or its metadata.
- “Full write access”: The supplementary unit or case manager has write access to the record’s metadata and any attached documents (including the record document).

The default access right for supplementary units and case managers is “Full write access”. The default value applies to all new users and when user settings are reset.
</td></tr>
<tr><td>“Show only record preview (no document preview)”</td><td>If this box is ticked, the user must click on Show preview to display a preview of the record’s attached documents.</td></tr>
</table>

Function	Description
	If the box is unticked, F2 automatically shows a preview of the record’s attached documents.
“Show number of new notifications on the F2 taskbar icon”	Tick this box to display the number of notifications on the F2 icon in the computer’s taskbar.  **Figure 8: Displayed number of notifications**
“In my personal inbox”	If this box is ticked, the F2 icon flashes when the user receives a new record in their personal inbox.
“In one of my units’ inboxes”	If this box is ticked, the F2 icon flashes when the user receives a new record in one of their unit inboxes.
“Ask before closing F2”	Tick this box to show the “Close cBrain F2?” dialogue when closing F2. If the box is unticked, F2 closes without asking for confirmation.  **Figure 9: The “Close cBrain F2?” dialogue**

The “Main window” tab

It is possible to personalise the default settings for the main window. Click on the **Main window** tab in the “Setup” dialogue as shown below.

It is also possible to adjust how searches are generally displayed.

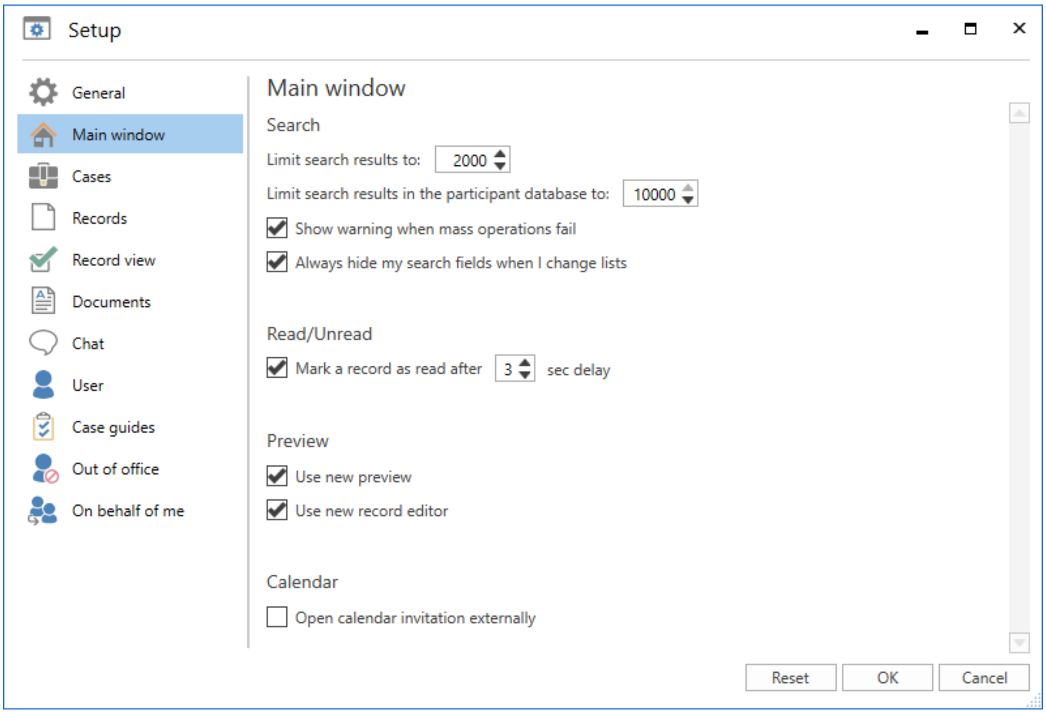


Figure 10: "Main window" setup

The main window's setup options are described below:

Function	**Description**
"Limit search results to:"	Specify the number of search results to display in a list when a search is performed. After performing a search, F2 shows the number of results on the blue status line in the bottom left corner. If search results have been limited to e.g. 300, F2 shows no more than 300 results even if the actual number of results is greater. **Note**: A high search result limit may cause a slower search performance.
"Limit search results in the participant database to:"	Specify the number of search results to display when a search is performed in the participant register. After performing a search, F2 shows the number of results on the blue status line in the bottom left corner. If search results have been limited to e.g. 1000 participants, F2 shows no more than 1000 participants even if the actual number of search results are greater.
"Show warning when mass operations fail"	If this box is ticked, a warning appears when a mass operation fails.

Function	Description
"Always hide my search fields when I change lists"	F2 remembers if search fields in a given list are displayed or hidden. Tick this box to hide the search fields when changing lists.
"Mark a record as read after X sec delay"	Tick this box to mark a record as read when previewed. Also determine the duration in seconds before it is marked as such. If the box is unticked, the record will be unread until it is opened or marked as read from the context menu.
"Use new preview"	Tick this box to display images and documents in a new and improved preview. The preview is described in F2 Desktop – Records and Communication. **Note:** If the new preview is enabled before the necessary software has been installed, F2 will show a message stating that the computer does not meet the requirements and to contact the organisation's IT department.
"Use new record editor"	Tick this box to access new and improved options in the record editor. The options include table setup and super- and subscript. The record editor is described in F2 Desktop – Records and Communication. **Note:** If the new editor is enabled before the necessary software has been installed, F2 will show a message stating that the computer does not meet the requirements and to contact the organisation's IT department.
"Open calendar invitation externally"	Tick this box to open calendar invitations directly in Microsoft Outlook from the F2 inbox by either pressing **Enter** or by double-clicking. Calendar invitations are opened as email records by default. **Note:** This setup requires an active calendar integration in the F2 installation.

The "Cases" tab

Click on **Cases** in the "Setup" dialogue to define which security groups to add to a newly created case. It is also possible to define which fields to display by default when opening a case.

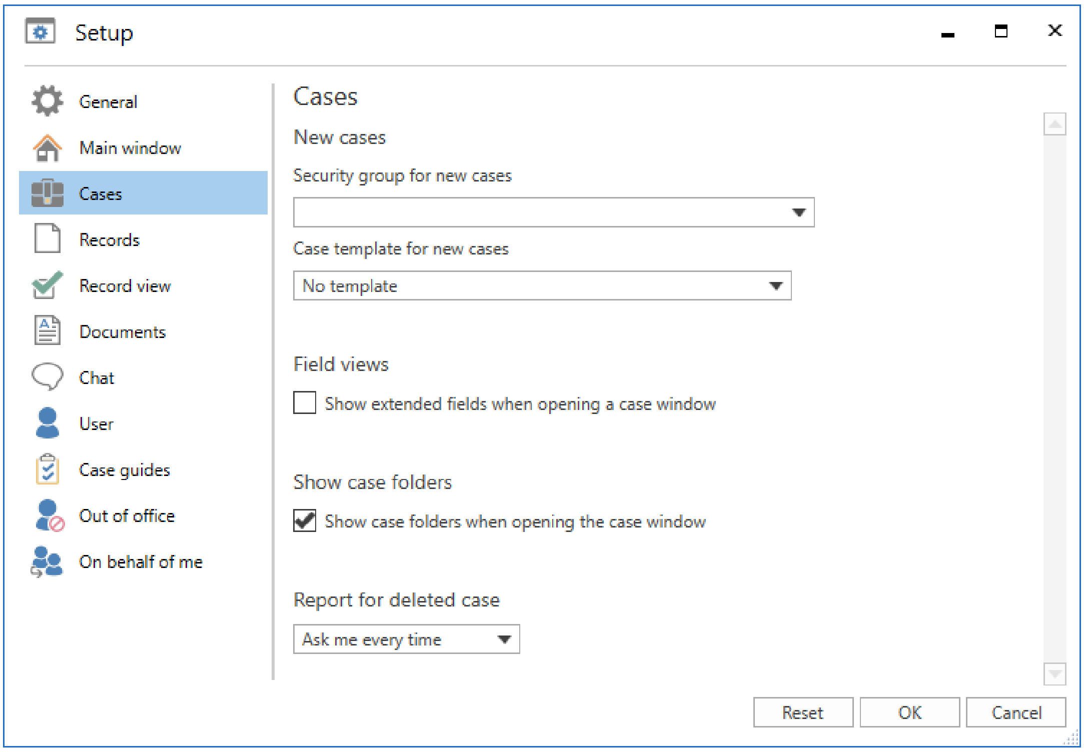


Figure 11: "Cases" setup

The setup options for the case window are described below:

Function	Description
"Security group for new cases"	Specify one or more security groups to automatically add when creating a new case. If this field is not filled in, no security groups are added when a new case is created. Security groups function as access groups with the purpose of protecting data in F2. A user with the "Security group administrator" privilege can assign users to security groups. Read more about security groups in *F2 Desktop – Administrator*.
"Case template for new cases" (add-on module)	Specify which case template that is selected by default when creating a new case. For further information on case templates, see the *F2 Case Template Editor – User manual*.
"Show extended fields when opening a case window"	Tick this box to show the extended metadata fields when opening a case window.
"Show case folders when opening the case window"	Tick this box to show the case folders, if any, when opening a case window.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Report for deleted case”</td><td>

Select a report option for when a case is deleted.

These options are only visible to users with either the “Can delete cases” privilege or the “Can delete everything on cases” role.

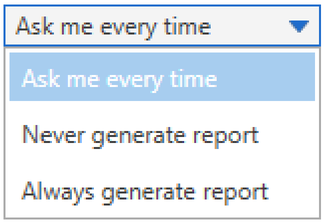


Figure 12: Report for deleted cases

The following options are available:

- “Ask me every time”
- “Never generate report”
- “Always generate report”.

The report generating options can be disabled. This means that users with the aforementioned privilege or role cannot generate reports for deleted cases.

The configuration is performed in cooperation with cBrain.

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

The “Records” tab

It is possible to personalise the record window’s settings. Click on **Records** in the “Setup” dialogue as shown below.

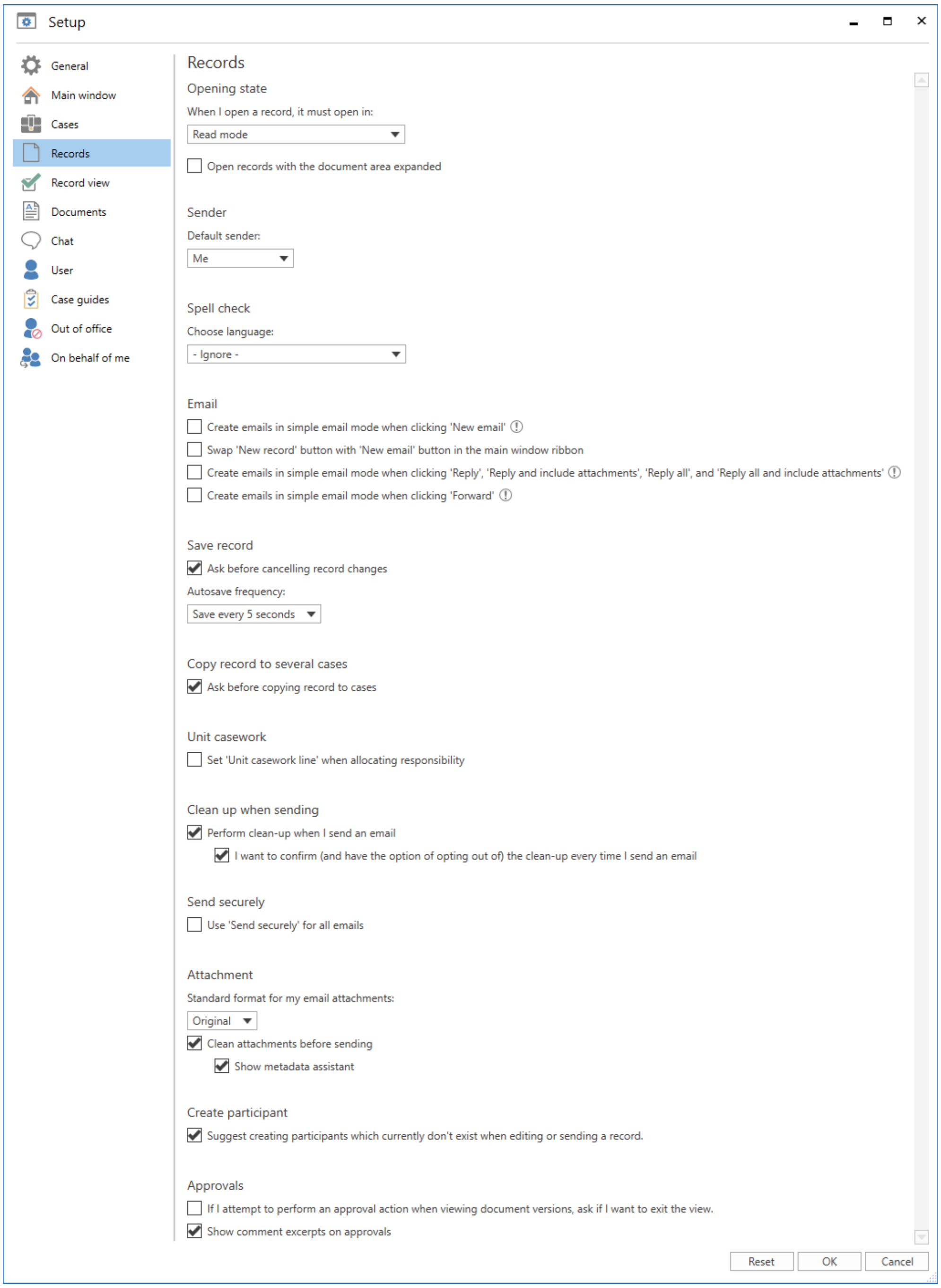
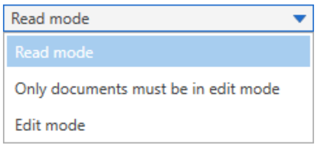
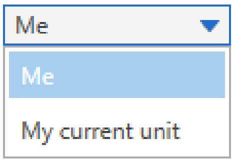
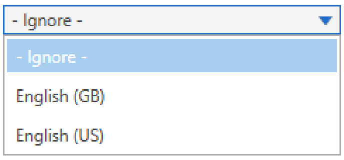


Figure 13: "Records" setup

The setup options for the record window are described below:

Function	Description
"When I open a record, it must open in:"	Choose in which mode to open a record.  **Figure 14: Modes when opening a record** The following options are available: • "Read mode" means the user must click on **Edit** in order to write in the record. • "Only documents must be in edit mode" opens the record in read mode, but any attached documents open in edit mode. • "Edit mode" lets the user edit metadata, attached documents, and the record document.
"Open records with document area expanded"	Tick this box to open a record with the document area expanded.
"Default sender"	Select the default sender of new deliveries.  **Figure 15: Select default sender** The following options are available: • "Me" • "My current unit". **Note**: It is always possible to select a different sender in the "From" field on an email regardless of the default sender.
"Choose language"	Select or deselect the spell-check function for the desired language.  **Figure 16: Select language**

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Create emails in simple email mode when clicking ‘New email’”</td><td>Tick this box to change the default email mode in F2 to simple email mode.

Simple emails have the following changes to functionality:
The case help is disabled.
No clean-up when sending is performed (the email is only removed from “My desktop”).
The sender cannot be changed (emails are sent from the default sender).
Attachments cannot be edited.
The file format of attachments cannot be changed before sending (Metadata assistant is disabled).
The email text is not automatically backed up during editing.
Old signatures must be updated before they can be used.</td></tr>
<tr><td>“Swap ‘New record’ button with ‘New email’ button in the main window ribbon”</td><td>Tick this box to swap the New record and New email menu items on the main window ribbon, making the latter the primary button in the menu group.

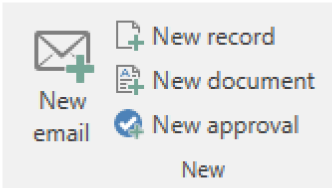


Figure 17: “New email” as primary button</td></tr>
<tr><td>“Create emails in simple email mode when clicking ‘Reply’, ‘Reply and include attachments’, ‘Reply all’, and ‘Reply all and include attachments’”</td><td>Tick this box to open the simple email window when clicking Reply, Reply and include attachments, Reply all, and Reply all and include attachments even if the incoming email is not a simple email.

When this option is enabled, the incoming email’s case attachment is preserved even though it is invisible in simple email mode.</td></tr>
<tr><td>“Create emails in simple email mode when clicking ‘Forward’”</td><td>Tick this box to open the simple email window when clicking Forward even if the incoming email is not a simple email.

When this option is enabled, the incoming email’s case attachment is preserved even though it is invisible in simple email mode.</td></tr>
</table>

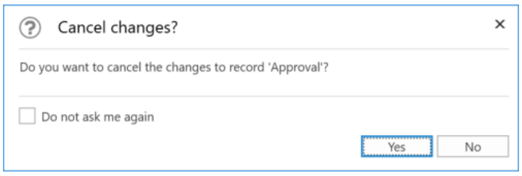
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Ask before cancelling record changes”</td><td>Tick this box to have F2 ask for confirmation when clicking Cancel in the record window.


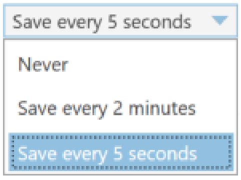
Figure 18: The “Cancel changes?” dialogue</td></tr>
<tr><td>“Autosave frequency”</td><td>Choose how often F2 saves the changes made to open record and approval documents.


Figure 19: Select the auto save interval

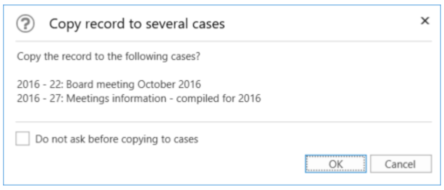
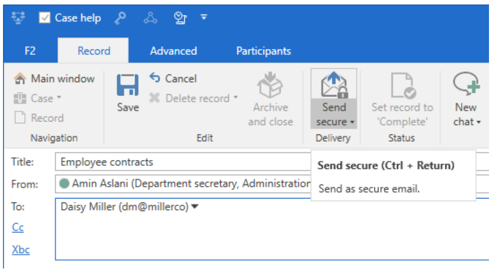
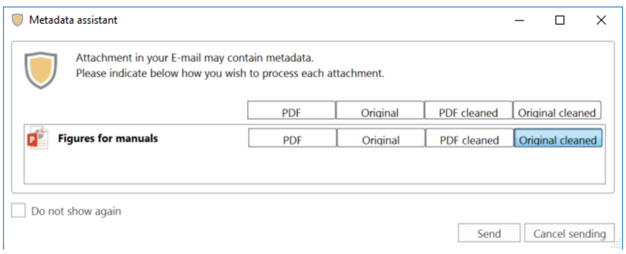
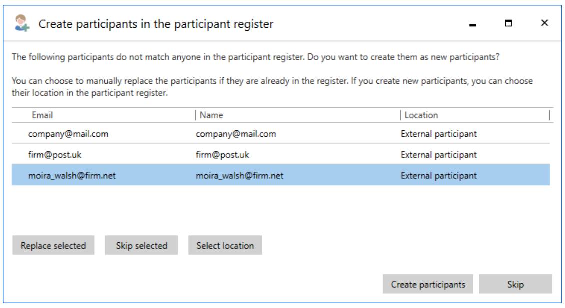
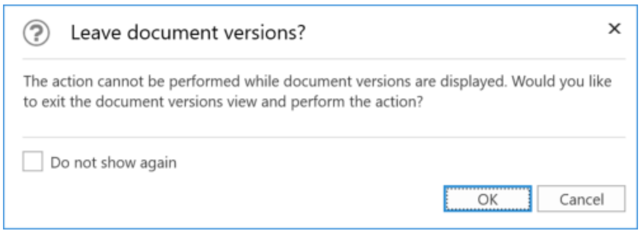
The following options are available:
“Never”
“Save every 2 minutes”
“Save every 5 seconds”.</td></tr>
<tr><td>“Ask before copying record to cases”</td><td>Tick this box to have F2 ask for confirmation when copying a record to several cases.


Figure 20: The “Copy record to several cases” dialogue
For further information on copying records to cases, see F2 Desktop – Records and Communication.</td></tr>
<tr><td>“Set ‘Unit casework line’ when identifying record responsible”</td><td>Tick this box to automatically tick off the “Unit casework line” field on a record when the record is allocated a responsible user or unit. For further information on this line, see F2 Desktop – Records and Communication.</td></tr>
<tr><td>“Perform clean-up when I send an email”</td><td>Tick this box to have F2 help clean up by automatically completing and moving the record to the “Archive” when it is sent.</td></tr>
</table>

Function	Description
"I want to confirm (and have the option of opting out of) the clean-up, every time I send an email"	Tick this box to have F2 ask for confirmation before performing the clean-up.
"Use 'Send securely' for all emails"	Tick this box to make the "Send secure" (add-on module) function the default setting for email records. It is possible to deselect this option in the record window before sending an email.  **Figure 21: "Send secure" as a default setting** **Note**: The **Send** button in the record window changes according to the user's default setting. If the user has ticked the "Send secure" box, the **Send secure** is shown as the default sending option.
"Standard format for my email attachments:"	Choose whether attachments to an outgoing record should have the format "PDF" or "Original".
"Clean attachments before sending"	Choose whether to send record attachments with or without metadata.
"Show metadata assistant" (add-on module)	F2 shows the sender the format of any attachments before an email is sent. Before sending an email to an external participant, F2 opens the dialogue below in which the user can choose the attachments' format and whether to include metadata.  **Figure 22: The "Metadata assistant" dialogue**

Function	Description
"Suggest creating participants which currently don't exist when editing or sending a record."	Tick this box to open the dialogue below when F2 detects an unregistered participant upon sending or receiving an email. The dialogue allows the user to save the participant.  **Figure 23: The "Create participants in the participants register" dialogue** For further information about the "Create participants in the participant register" dialogue, see *F2 Desktop - Records and Communication*.
"If I attempt to perform an approval action when viewing document versions, ask if I want to exit the view" (add-on module)	If an attempt to process an approval is done while viewing the document versions in the log, the dialogue below appears.  **Figure 24: The "Leave document versions?" dialogue** For further information, see *F2 Approvals – User manual*.
"Show comment excerpts on approvals"	Tick this box to show comment excerpts should directly in the approval step overview. The excerpts are shown under the approver's name. For further information about approval, see *F2 Approvals – User manual*.

The "Record view" tab

It is possible to personalise the default display of the record window. Click on **Record view** in the "Setup" dialogue to access the settings as shown below.

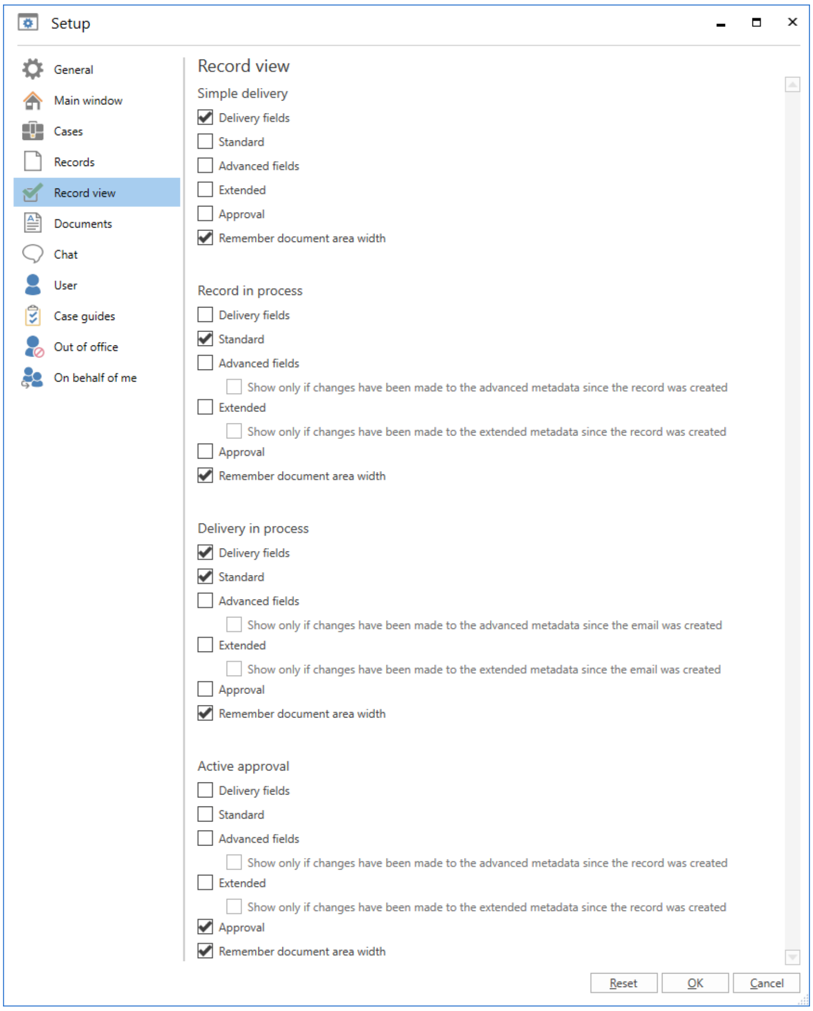


Figure 25: "Record view" setup

The viewing options for the record window are described below. For example, it is possible to choose whether a record opens with its metadata fields collapsed or expanded. It is also possible to have F2 remember adjustments in the width of the document area. For further information on the record window's display options, see *F2 Desktop – Records and Communication*.

Function	**Description**
"Simple delivery"	Select how to display metadata for delivery records.
"Record in process"	Select how to display metadata for records in process.
"Delivery in process"	Select how to display metadata for delivery records in process.
"Active approval" (add-on module)	Select how to display metadata for active approvals.

The “Documents” tab

On the **Documents** tab, choose how to open an attached document from either a record in read-only mode or directly from the main window.

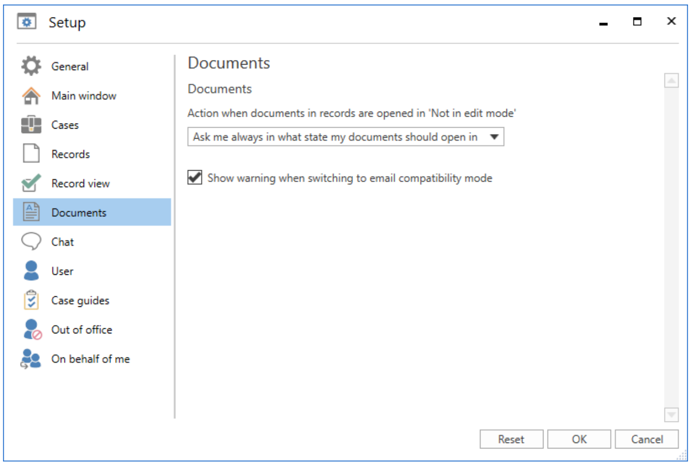


Figure 26: “Documents” setup

The available options for “Action when documents in records are opened in ’Not in edit mode’” are described below. The selected option will be F2’s default action when opening attached documents and applies to both the record and the main window.

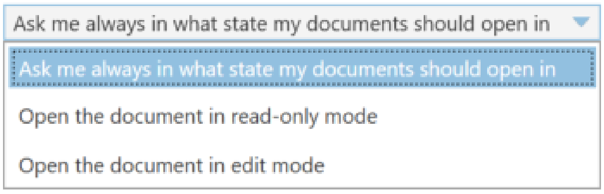
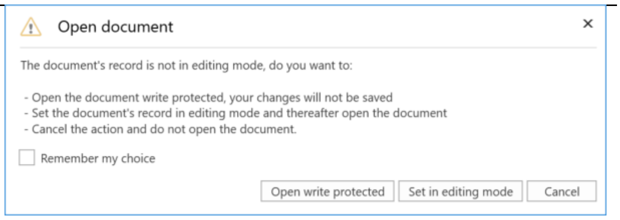


Figure 27: Select the opening state for documents

Note: Using a configuration, it is possible to display the record document and attached HTML files in compatibility mode. The option is accessed by right-clicking inside the document of e.g. an email that is not displayed correctly. Spell-checking is disabled in compatibility mode. If the configuration is enabled, the checkbox “Show warning when switching to email compatibility mode” is visible on the “Documents” tab. The configuration is performed in cooperation with cBrain.

Function	**Description**
“Ask me always in what state my documents should open in”	Select this option to display the dialogue below whenever a document is opened from a record that is not in editing mode.

Function	Description
	 **Figure 28: The "Open document" dialogue** Choose to open the document in read-only mode or in edit mode as described below.
"Open the document in read-only mode"	The document opens in read-only mode, and changes to the document cannot be saved. This setting is primarily used when a document is to be read but not processed further.
"Open the document in edit mode"	The document opens in edit mode, if the user has write access to documents, and can be processed immediately. Opening the document puts the record into edit mode as well, locking it from being edited by others.

The "Chat" tab

After clicking on **Chat** in the "Setup" dialogue, set the chat display settings.

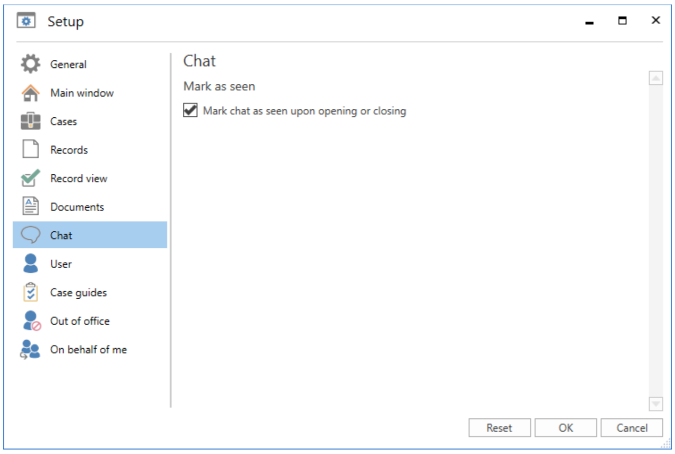


Figure 29: "Chat" setup

Below are the setting options for the "Chat" dialogue.

Function	Description
"Mark chat as seen upon opening or closing"	Tick this box to automatically mark a chat as seen when the chat dialogue is opened.

The “User” tab

On the **User** tab it is possible to select a default role. If a user has multiple job roles, the user can choose to display the “Select role” dialogue at login.

Here visually impaired users can activate F2’s accessibility options to operate F2 using a screen reader.

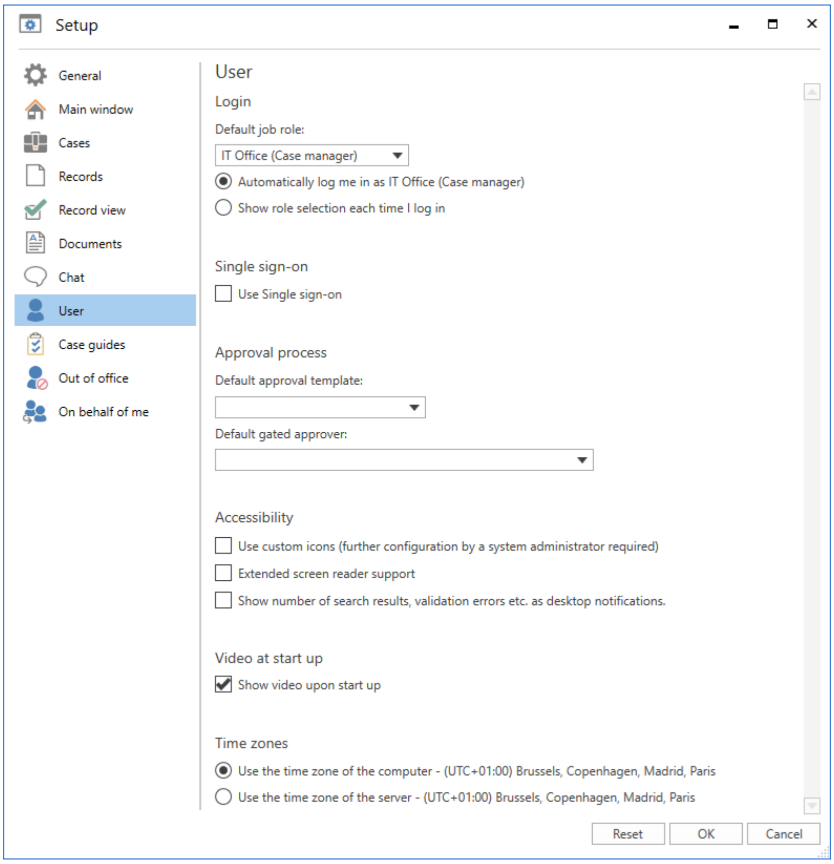


Figure 30: “User” setup

Below are the setting options.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Default job role”</td><td>Select the user’s default role when logging in.

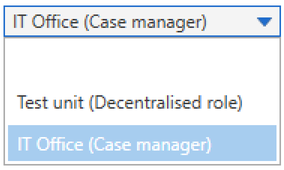


Figure 31: Select default role

The available options depend on the job roles the user has been assigned by a user with the “User administrator” privilege.

This role is also used for email import.</td></tr>
</table>

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Automatically log me in as”</td><td>Choose this option to automatically log into F2 with the default job role.</td></tr>
<tr><td>“Show role selection each time I login”</td><td>Choose this option to always display the “Select role” dialogue on login.

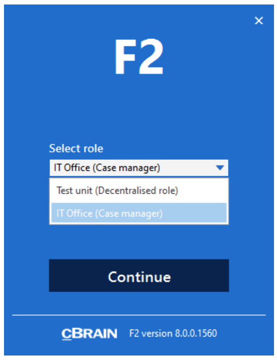


Figure 32: The “Select role” dialogue

In the dialogue, the user selects which role to use for login.

If no role is selected from the drop-down menu, the user is automatically logged in with the default job role.</td></tr>
<tr><td>“Use Single sign-on”</td><td>Select whether to turn off single sign-on, in which case a password must be entered to log into F2.

Note: If single sign-on is inactive, it is possible to activate when logging in. Single sign-on uses the Windows login to log into F2.

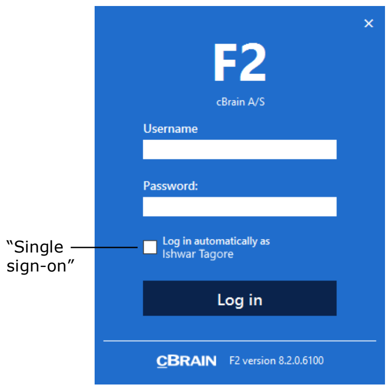


Figure 33: Login using “Single sign-on”</td></tr>
<tr><td>“Default approval template” (add-on module)</td><td>Select which approval template to use as a default when creating a new approval process.</td></tr>
</table>

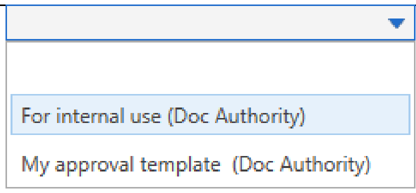
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td></td><td>


Figure 34: Select default approval template
</td></tr>
<tr><td>“Default gated approver” (add-on module)</td><td>Approval gatekeepers who manage approvals on behalf of multiple gated approvers can select a default approver in this drop-down menu. Information related to the gated approver will be shown in the result list columns “Days to gateway sorting deadline”, “Gateway flag”, “Gateway location”, and “Gateway sorting deadline”.</td></tr>
<tr><td>“Use custom icons (further configuration by a system administrator required)”</td><td>
This function must first be configured in cooperation with cBrain. Users can then enable versions of certain icons that are easier to distinguish.

Ticking this box makes it possible to replace the standard F2 icons with high-contrast ones. The icons have a greater difference between light and dark areas as shown in the example below.

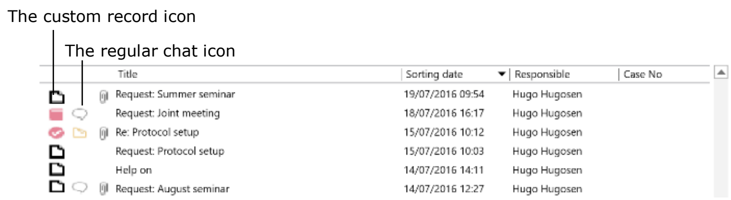


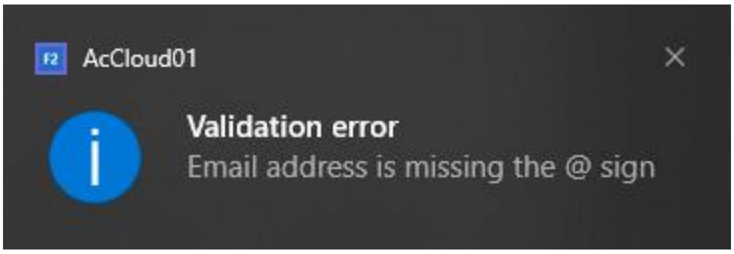
Figure 35: Example of an icon with high contrast

Note: Checking this box has no effect unless custom icons have been configured in cooperation with cBrain.

F2 must be restarted for the changes to take effect.
</td></tr>
<tr><td>“Extended screen reader support”</td><td>
Tick the box to enable the use of a screen reader in F2.

Note: Search lists must be manually updated when navigating between them while using a screen reader. This means that highlighting a search list in the main window or in search windows like “Choose participants” will not automatically open it. This ensures quick navigation between lists via the Tab key. Press **F5** to load the list results once the relevant list has been highlighted.

F2 must be restarted for the changes to take effect.
</td></tr>
<tr><td>“Show number of search results, validation errors etc.</td><td>Tick this box to enable notifications. The notifications offer information regarding searches, warning icons, and</td></tr>
</table>

Function	Description
as desktop notifications."	validation errors such as invalid values when entering an email address, etc. Notifications are delivered as Windows notifications to support better accessibility in F2 and are shown at the bottom of the screen.  **Figure 36: Example of Windows notification** F2 must be restarted for the changes to take effect.
"Show video upon start up"	Tick the box to show the start-up video. **Note**: The start-up video can only be shown if it is available in the F2 installation. The video is installed in cooperation with cBrain.
"Time zones"	Choose between the F2 client's or the server's time zone: • "Use the time zone of the computer" • "Use the time zone of the server". The selected time zone is used e.g. in the timestamps of chats. When using the F2 client's time zone, deadlines etc. are shown in the user's local time when abroad. This also applies when entering dates and times for deadlines or searches. Other F2 users in a different time zone will see the date and time for their own time zone. Dates and times that are generated on the server are always displayed in the server's time zone. This applies to e.g. conversion of Word documents into PDF files. **Note**: This is a configuration option and is configured in cooperation with cBrain.

The "Case guides" tab (add-on module)

If the F2 Task Guides add-on module is available, the "Case guides" tab is displayed. Click on **Case guides** in the "Setup" dialogue to view the setup options.

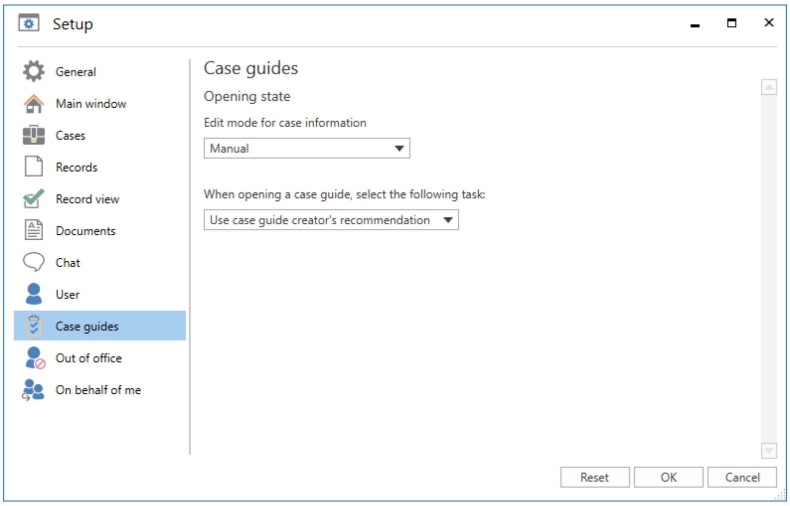


Figure 37: Setup for "Case guides"

The user setting options for case guides are described below.

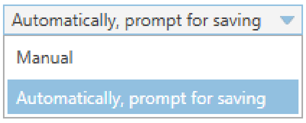
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>"Edit mode for case information"</td><td>Select the edit mode for case information when opening a case guide. Two options exist:
"Manual"
"Automatically, prompt for saving".


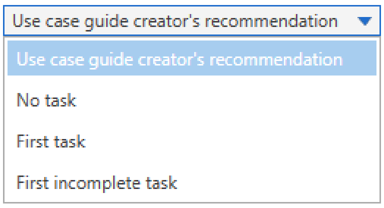
Figure 38: Select edit mode for case information</td></tr>
<tr><td>"When opening a case guide, select the following task"</td><td>Select how to navigate from the selected case guide process. The following options exist for the user's starting point when opening a case guide:
"Use case guide creator's recommendation".
"No task".
"First task".
"First incomplete task".


Figure 39: Select which task to display when opening a case guide</td></tr>
</table>

The "Out of office" tab

Click on **Out of office** in the "Setup" dialogue to create an automatic out of office reply. This message applies to internal communication in F2. External senders may also receive the automatic reply if this is enabled by the organisation in the configuration of the email account.

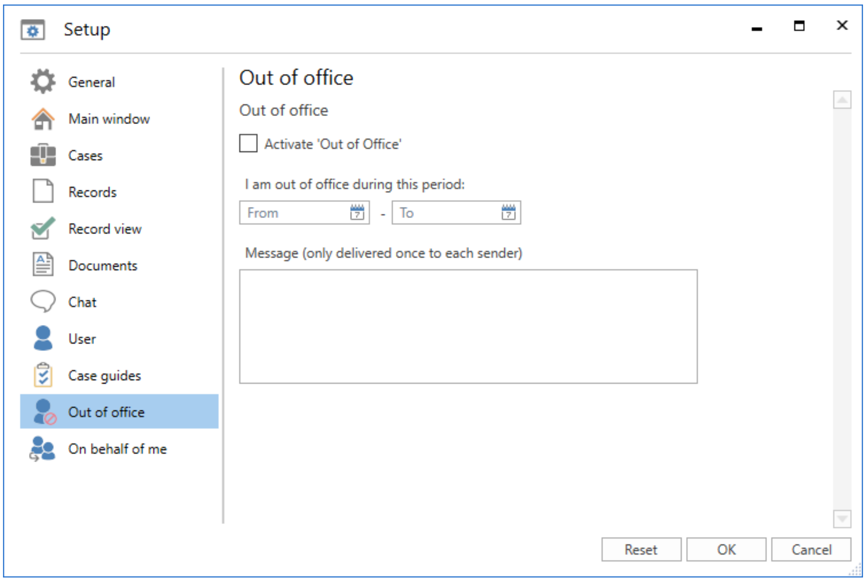
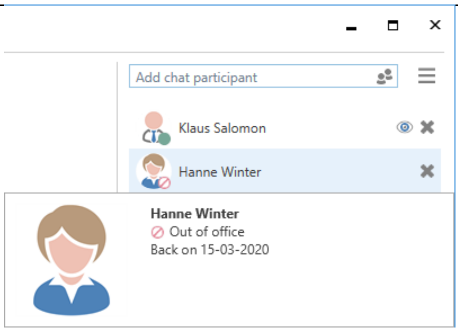


Figure 40: "Out of office" setup

The setup options are described below.

Function	Description
"Activate 'Out of Office'"	Tick this box to indicate that the user is not present due to vacation, sick leave, etc. When the box is ticked, the "Out of office" feature is activated and automatically sends a reply when receiving an email in F2. **Note**: If no "To" date has been entered under "I am out of office during this period", the box must be manually unticked when the user returns. As displayed in the figure below, the user image will display the "out of office" icon. Hovering the mouse over the user on the participant list in chats or notes shows that the user to be out of office and the date when they return.

Function	Description
	 **Figure 41: Out of office in chat**
"I am out of office during this period:"	Specify the period in which the user is out of office. Either type a date, or select one from the calendar. "Out of office" is activated automatically when the specified period begins and deactivated when it ends.
"Message (only delivered once to each sender)"	Enter an automatic replay which is sent to users who attempt to contact the user who is out of office. **Note**: The message is sent to each sender only once, even if the user receives multiple emails from the same sender.

Note: It is possible to save the "Out of office" settings while logged in on behalf of another user. Other user settings are not saved when logging out or switching to another "on behalf of" user.

The "On behalf of me" tab

Click on **On behalf of me** to assign rights to another user, so they can act on behalf of the unavailable user. This feature is useful when a secretary must be able to act on behalf of a manager or when a user must act on behalf of a colleague who is away from F2.

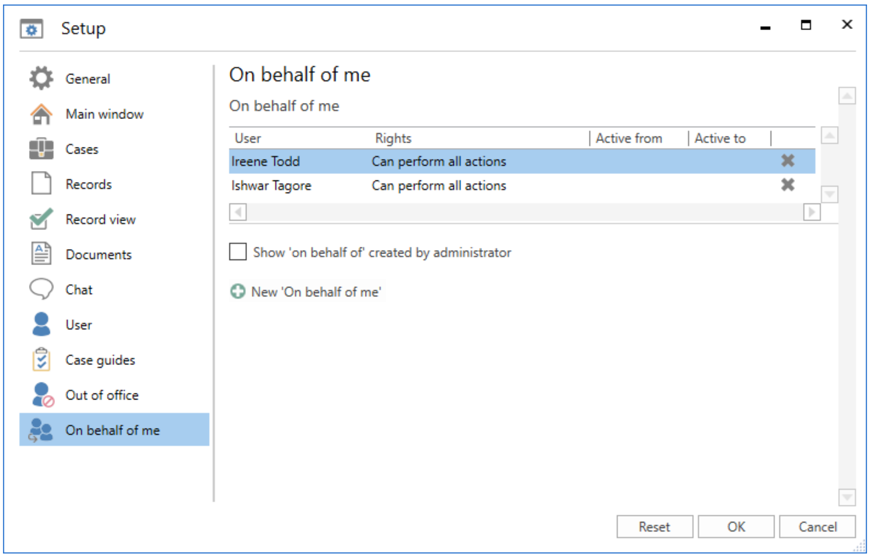
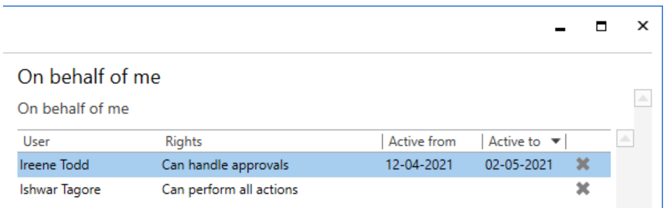
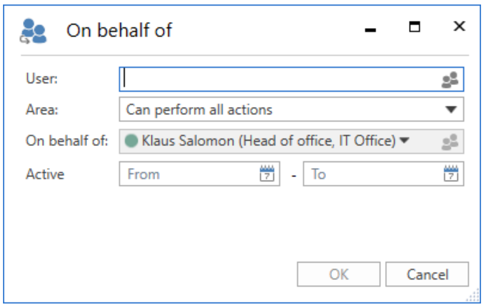


Figure 42: "On behalf of me" setup

The setting options are described below.

Function	Description
"On behalf of me"	If "on behalf of" rights have been granted to another user, it is possible to see the following in the list: • To whom the rights have been given. • The area covered by the rights. • The duration of the rights. Rights can be withdrawn/deleted by clicking the  next to the relevant user. "On behalf of" rights are automatically deleted once the "Active to" date has passed.  **Figure 43: The "On behalf of me" list**
"Show 'on behalf of' created by administrator"	Tick this box to view the "on behalf of" rights that have been granted by a user with the "On-behalf-of administrator" privilege.
"New 'On behalf of me'"	Click to open the following dialogue:

Function	Description
	 **Figure 44: Assign "on behalf of" rights** Specify the following: • In the "User" field, enter the name of the colleague who it to be assigned "on behalf of" rights. • In the "Area" field, select which rights to assign to the colleague. It is possible to choose between "Can perform all actions" and "Can handle approvals" (add-on module). • In the "On behalf of" field, select the user on whose behalf the colleague is acting. • In the "Active" field, specify the duration of the "on behalf of" rights. If no dates are entered, the "on behalf of" privileges are active until manually disabled. • Click on **OK** to complete the act of granting "on behalf of" rights.

Note: It is possible to save the "Out of office" settings while logged in on behalf of another user. Other user settings are not saved when logging out or switching to another "on behalf of" user.

User settings

A user can retrieve a default user setting or partial user, list, or column settings. These defaults contain the setup of specific user, list, or column settings that determine which columns are shown in the result list, column order and width, how columns are sorted, and column grouping, if applicable.

Users with the "Settings administrator" privilege can create and adjust user settings for the users' different roles, as different roles typically require different setups. Read more about roles in *F2 Desktop – Administrator*.

In the "Settings" tab in F2's main window, click on **User settings** to open the "User settings" dialogue.

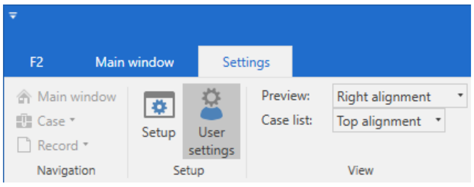


Figure 45: The "User settings" menu item

The dialogue shows a list of all created user settings. Click on the desired user setting to make the **Use this user's setting** menu item active in the ribbon as shown below.

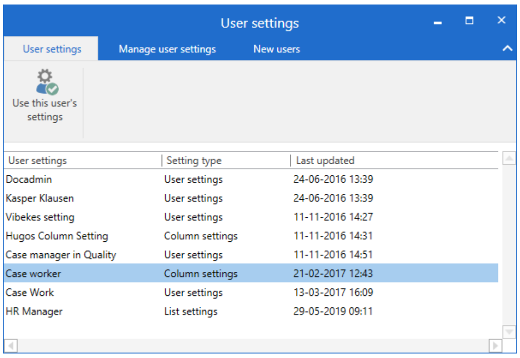


Figure 46: The "User settings" dialogue

Click on **Use this user's setting** to overwrite the existing user settings. A notification appears with the text "You have now the column settings from '[user setting title]'".

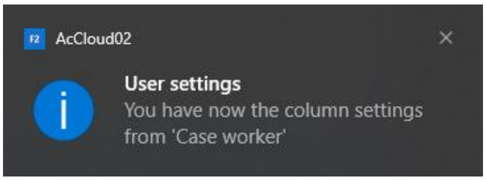


Figure 47: User setting notification

Note: When new user settings are retrieved, F2 must be restarted for the settings to take effect. The new user settings will overwrite any previous changes to the user settings.

User images

It is possible in F2 to add images for F2 users, units, and external participants. The images are displayed in the participant properties dialogue units, users and external participants. For users of F2 the image is also displayed in the chat window and in the user identification in the upper right corner of the main, record, and case windows.

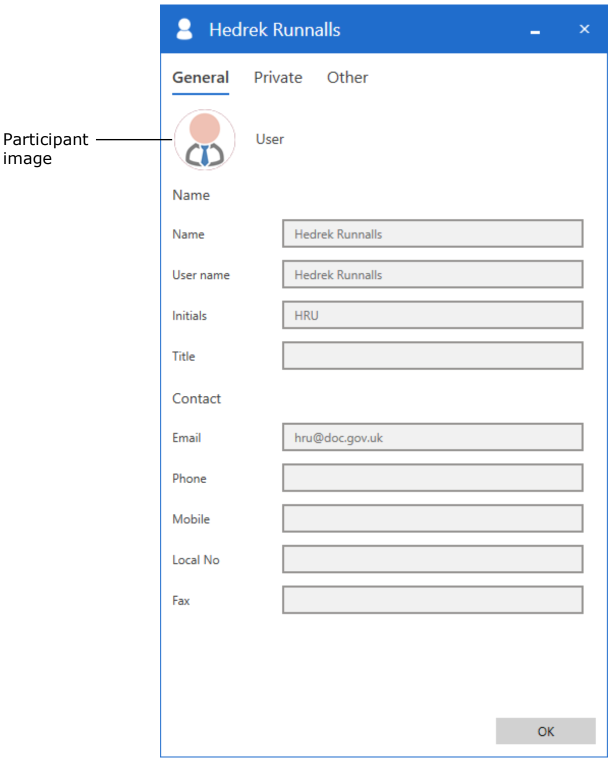


Figure 48: Image on the participant properties dialogue

> **Note**: It is only possible to add, change, and remove the image of one's own user and for external participants. Only users with the "User administrator" privilege can add, change, or remove images for units and other F2 users.

Add, change, or remove an image

It is possible to add, change, or remove images for users, units, and external participants in the participant register. To add or change an image, select **Change image** in the context menu of the participant in the participant register.

To open the participant register, click on **Contacts** in the navigation bar. Right-click on the wanted participant and select **Change image**. To remove an image, select **Remove image** from the context menu.

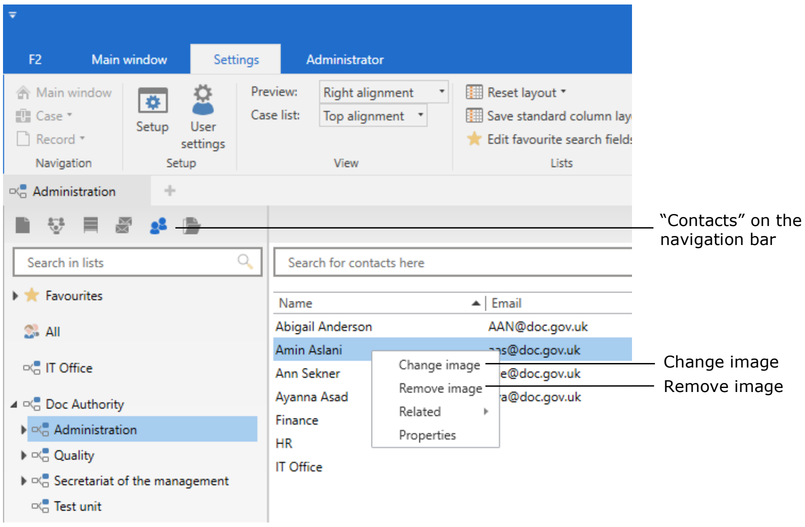


Figure 49: The context menu for participants

In the "Change image" dialogue, select an image from either a local or external drive using the **Browse** button. Use the zoom slider to adjust the size of the selected image. Then click on **OK**. The image is now added, replacing any previous image.

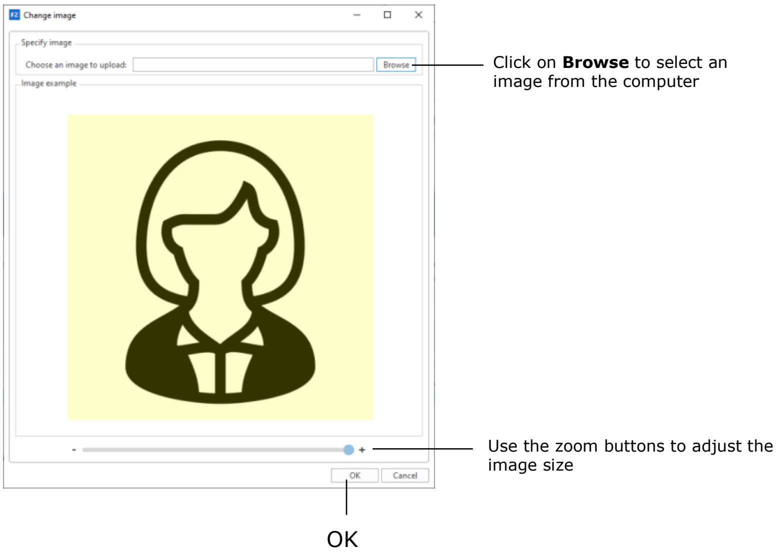


Figure 50: The "Change image" dialogue

F2 users can also change the image using the user identification located in the upper right corner of the main, record, and case windows.

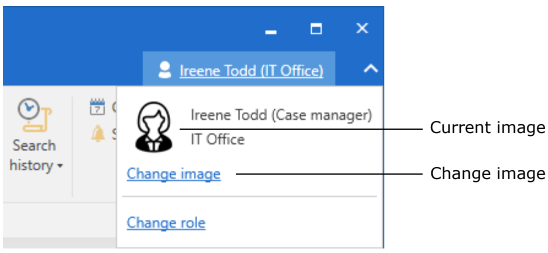


Figure 51: Change the image through the user identification

Setting up views in F2

On the "Settings" tab it is possible to set up the list and folder views in F2. The views can be adjusted for every individual list, search and folder. For more information, see *Setting up the result list*.

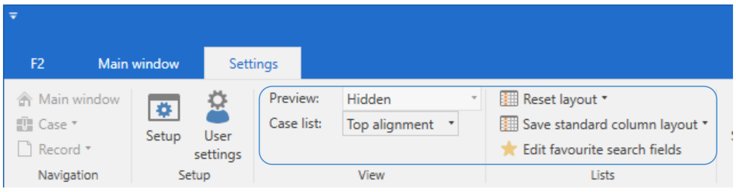


Figure 52: View settings on the "Settings" tab

The menu items "Preview", "Case list", "Reset layout", and "Save standard column layout" are described below.

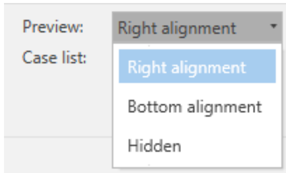
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>"Preview"</td><td>A preview of a record document or the first few pages of an attachment is shown in a separate window when the user clicks on a record. The preview is an effective tool to gain an overview of the contents of a specific record.


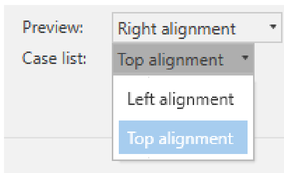
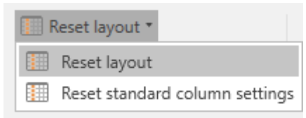
Figure 53: Preview
The preview display options are:
• "Right alignment"
• "Bottom alignment"
• "Hidden".
Selecting "Hidden" hides the preview.
Note: For large files, only a limited number of pages is shown in the preview. F2 will inform the user when this is the case.</td></tr>
<tr><td>"Case list"</td><td>Choose where to display the case window in the "Show cases" view.


Figure 54: Case list</td></tr>
</table>

Function	Description
	The options are "Left alignment", which displays cases to the left and associated records to the right, and "Top alignment", which displays cases above the associated records.
"Reset layout"	"Reset layout" overwrites any current column layout settings. If the user has saved any standard column settings these will be retrieved, otherwise the global default layout settings are applied.  **Figure 55: Reset layout** "Reset standard column settings" removes the user's saved standard column settings and replaces them with the global default column settings.
"Save standard column layout"	This operation overwrites any previously saved standard column settings (for the chosen list, search, or folder) and replaces them with the current column settings.  **Figure 56: Save standard column settings**

Note: F2 applies the new column layout once F2 has been restarted.

There are three different layout levels for column settings in F2: basic, standard, and personal.

Level	Description
Basic column settings	These settings are delivered with F2 and are non-changeable.
Global standard column settings	These settings are configured by a user with the "Result list administrator" privilege. These are configured when a new non-personal search is created. F2 then saves this layout as the global standard layout.
Standard column settings	These are the user's personal settings. Any changes to the column settings can be saved as standard settings. Unsaved changes to column settings will only be stored for the list wherein the changes were made.

When a saved search is opened, F2 applies the column settings associated with said search. If the user has made no changes to the settings, F2 applies the global standard column settings for that search. If these have not been set up either, the basic column settings are used.

Signatures

Click on the menu item **Signatures** in the "Settings" tab to create or edit a signature.

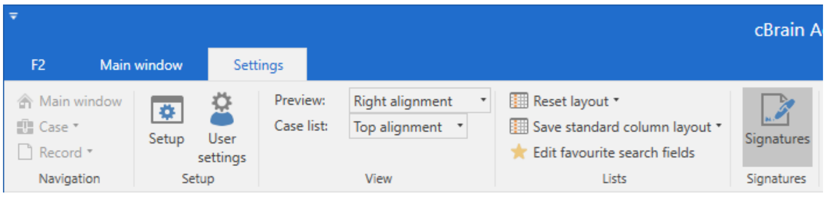


Figure 57: "Signatures" on the "Settings" tab

There are no limits as to how many signatures a user can have in F2. However, it is only possible to choose one signature to add to a record when it is opened.

A default signature template can be set up for all users in cooperation with cBrain.

Create a new signature

Click on **Signatures** to open a dialogue that provides an overview of the user's signatures.

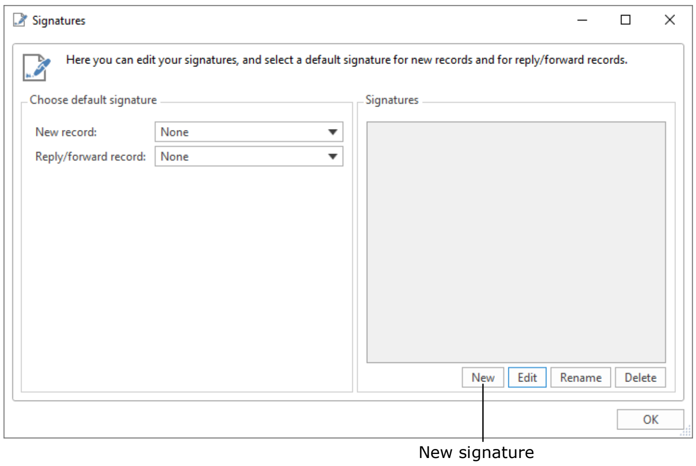


Figure 58: Create signature

Click on **New**. The "New signature" dialogue opens as shown below. Enter a name for the new signature.

Figure 59: Name the new signature

After entering the name of the new signature, click **OK**. A window then opens in which the user can edit the signature, like shown below. When the signature is finished, click **OK**.

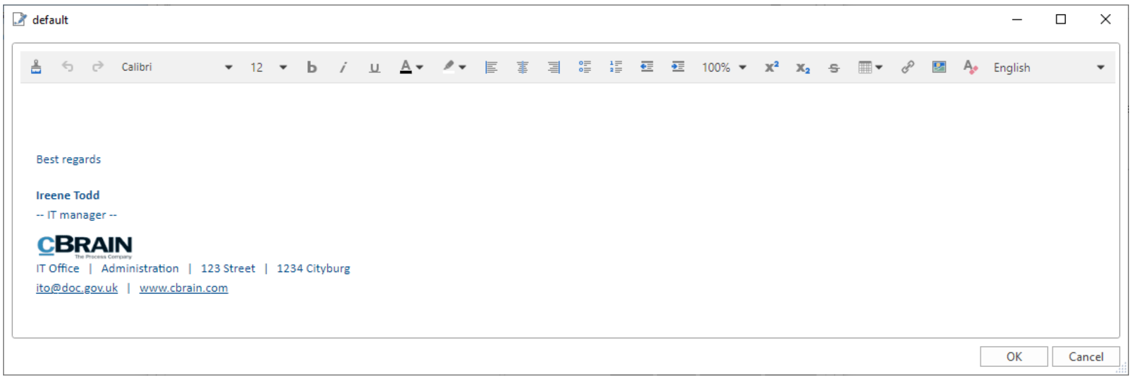


Figure 60: Editing the signature

Insert signature

A signature can be inserted directly in the record document. To do this, click on **Insert** on the record, and the signature text will be placed in the record document where the cursor is located.

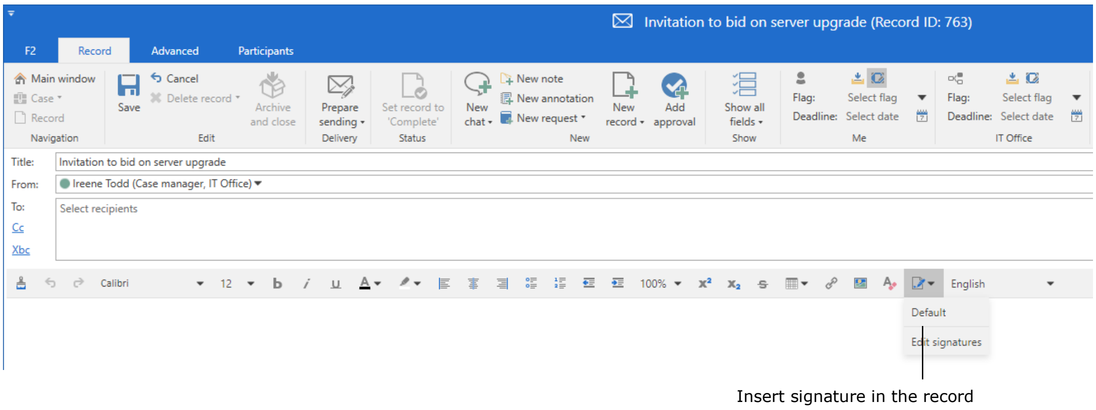


Figure 61: Insert signature

It is possible to automatically insert a signature when a new record is created. This also applies to emails that are replied to or forwarded. Click the **Signatures** menu item and use the drop-down menu to insert the desired signature for “New record” and “Reply/Forward record”, respectively. Both are set to “None” by default.

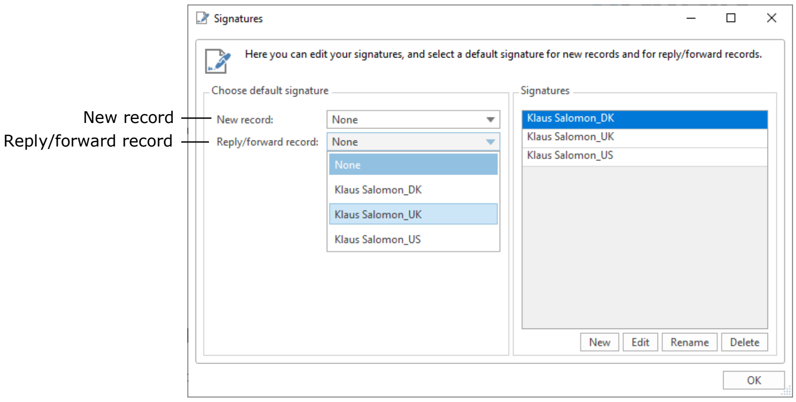


Figure 62: Add signature

Edit existing signatures

An existing signature can be edited, renamed, or deleted.

- To edit an existing signature, select it and click on **Edit**.
- To rename an existing signature, select it and click on **Rename**.
- To delete an existing signature, select it and click on **Delete**.

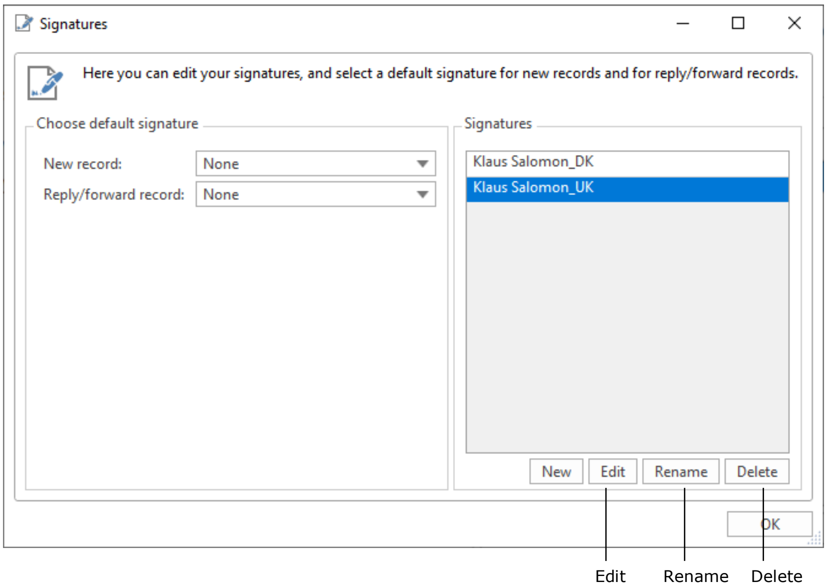


Figure 63: Edit, rename or delete signature

It is possible to add, edit, and delete signatures in two ways in F2. Either as shown above from the "Settings" tab using the **Signatures** menu item, or by performing the action directly from a record.

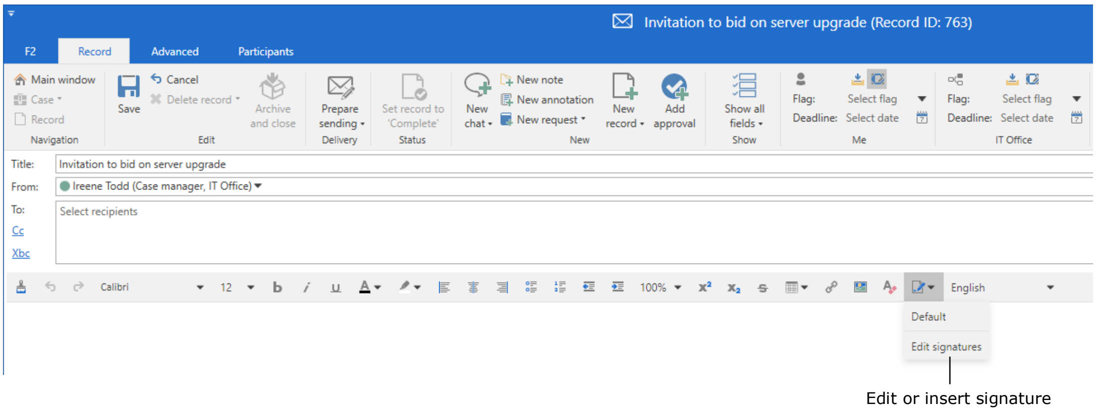


Figure 64: Edit a signature from the record window

Language

The **Language** menu item is found on the “Settings” tab. Languages other than the customer’s primary language are add-on modules.

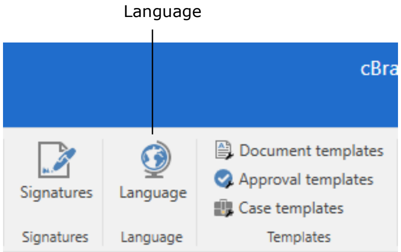


Figure 65: The menu item “Language” under the “Settings” tab

Depending on the languages with which the F2 installation has been configured, it is possible to choose between languages when logging in. The following languages are currently available: Danish, English, and German.

To change the language, click on the **Language** menu item. The following dialogue appears.

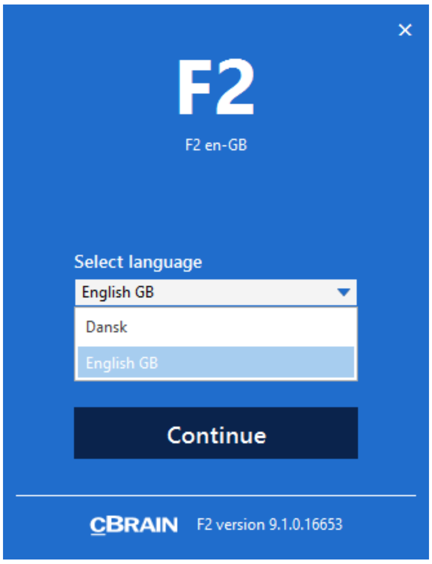


Figure 66: Select language

Note: F2 will restart when a new language has been selected.

Templates

In F2 it is possible to save templates for Office programs. These templates can be used when new documents are created in F2. The "Templates" menu group can be found on the "Settings" tab in the main window.

Using the "Templates" menu group, it is possible to administrate document, approval, and case templates for an authority.

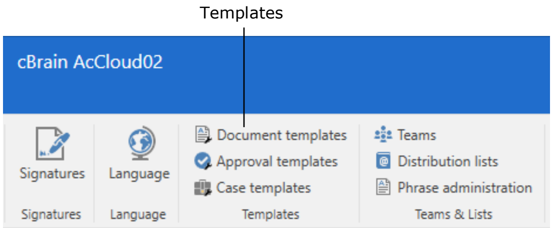


Figure 67: The menu item "Templates" under the "Settings" tab

All users can create private document templates to use for daily work. A document template can be made available for the entire authority or for an individual unit under the authority by a user with the "Template administrator" privilege.

Depending on the F2 installation and the users' privileges, between one and three types of templates will appear in the "Templates" menu group:

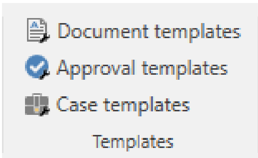


Figure 68: Select templates

In the example above it is possible to access templates for both documents, approvals and cases.

A user must have the "Can create case templates" privilege to create and edit case templates. Read more in *F2 Case Template Editor – User manual*.

Any user can create approval templates. Read more about creating approval templates in *F2 Approvals – User manual*.

The "Templates" dialogue

Click on **Templates** to open the dialogue below. Here the authority's and the user's personal templates will be displayed.

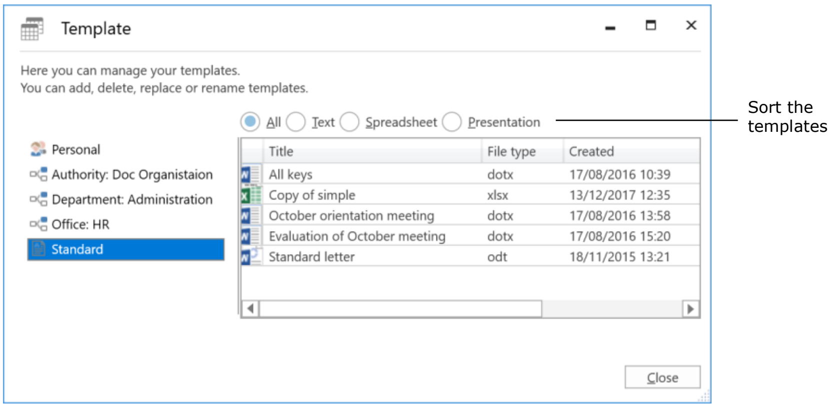


Figure 69: Template maintenance

The document templates can be sorted by the following categories: "All", "Text", "Spreadsheet", or "Presentation".

In the F2 installation depicted above, it is possible to create templates for:

Type	Description
Personal	The user's private document templates.
Authority	Document templates that are accessible for all users in the specific authority.
Department	The department's document templates can be used by all users in the department along with all underlying units.
Office	The office's document templates can be used by all users in an office.

In this dialogue it is possible to create, delete, move, and rename document templates. Right-click on a unit or folder and the following options appear:

- **Add template** to upload new Office templates.
- **Rename folder** to change the name of an already existing folder.
- **Delete folder** to delete a folder.
- **Create folder** to organise the document templates.

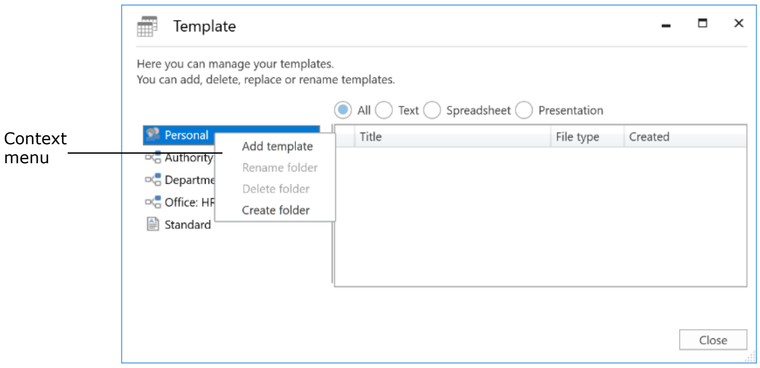


Figure 70: The menu that appears when right-clicking on a unit or folder

Right-click on a document template and the following options appear:

- **Properties** to correct an existing document template's properties, e.g. its title.
- **Save copy** to download a copy of an existing document template.
- **Replace content** to upload a replacement file for an existing document template.
- **Delete** to remove a document template.

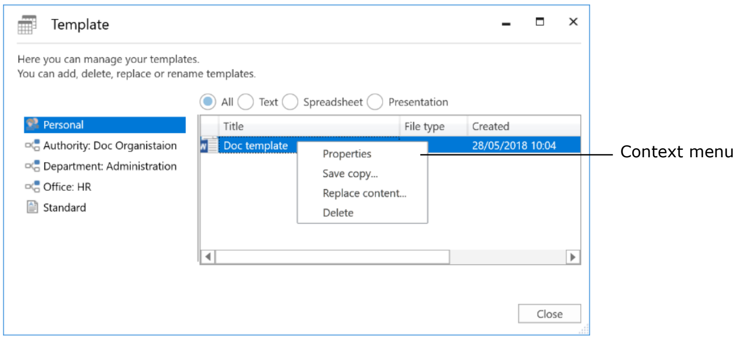
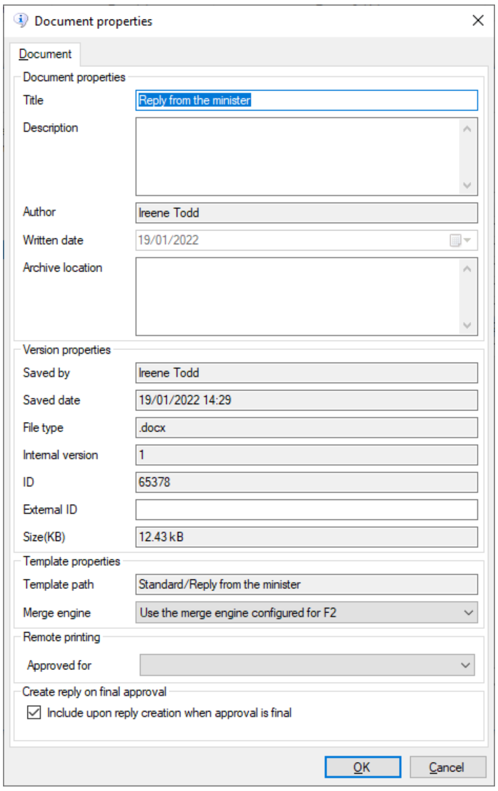
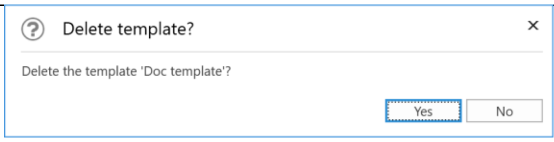


Figure 71: The menu that appears when right-clicking on a template

The menu items of the context menu are described below.

Function	Description
"Properties"	Click on **Properties** in the context menu to open the "Document properties" dialogue.

Function	Description
	 **Figure 72: Document properties** Here it is possible to change the title of the document template. It is also possible to view information about the template, such as the creator of the document on which it is based, the user who saved the template, when it was saved, etc. "Size (KB)" displays the document template's file size. The path for the template is also shown. The "Approved for" field is used to identify the document that the document template is associated with. This requires the F2 Remote Printing add-on module. The field "Include upon reply creation when approval is final" is used to automatically include documents on answer records. This requires the F2 Signed Approval add-on module. Read more in *F2 Signed Approval – User manual*.
"Save copy"	Select "Save copy" to save a copy of the document template file, either locally or on an external drive.
"Replace content"	Select "Replace content" to replace the chosen document template file with a file from an external drive.
"Delete template"	Select "Delete template" to delete the document template. Click on **Yes** in the dialogue to confirm the action.

Function	Description
	 **Figure 73: Delete template**

Adding a new document template

Document templates for use in F2 must be generated outside F2 and then imported. To do this, right-click on the folder or unit where the document template should be placed and click on **Add template**.

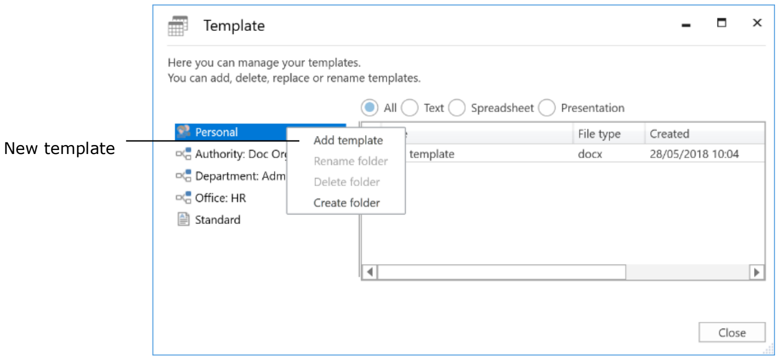


Figure 74: Create new template

Click on **Browse** in the "New template" dialogue to import the chosen document template from an external drive.

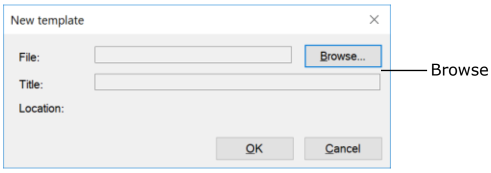


Figure 75: Add new template

Give the document template a title and select the location for the template.

Distribution lists

All users can create personal distribution lists. However, only users with the "Distribution lists editor" privilege can create and manage the joint distribution lists in F2.

It is possible to add other units and users (also from other F2 authorities) along with external participants to a distribution list. This allows for a list that contains a mix of participants from the user's own authority and participants from other authorities, units and external participants.

It is also possible to add a distribution list to another distribution list along with units, external participants and individual users. This makes updating distribution lists easier as distribution lists that contain the original list will automatically be updated, when the original list is updated.

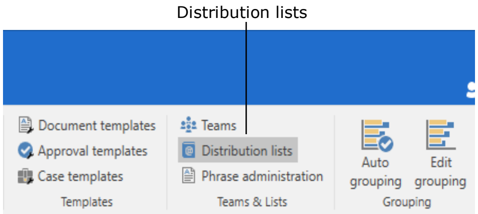


Figure 76: The menu item "Distribution lists" on the "Settings" tab

The **Distribution lists** menu item opens the window described below.

The "Distribution lists" window

It is possible to create new distribution lists and manage existing ones in the "Distribution lists" window. The distribution lists can be sorted using the following columns: "Name", "Last updated", "Created", and "Visibility".

The "Visibility" column indicates whether a distribution list is private or shared. A private list is given the "Me" visibility value, while a shared distribution list is given the "Everyone" visibility value.

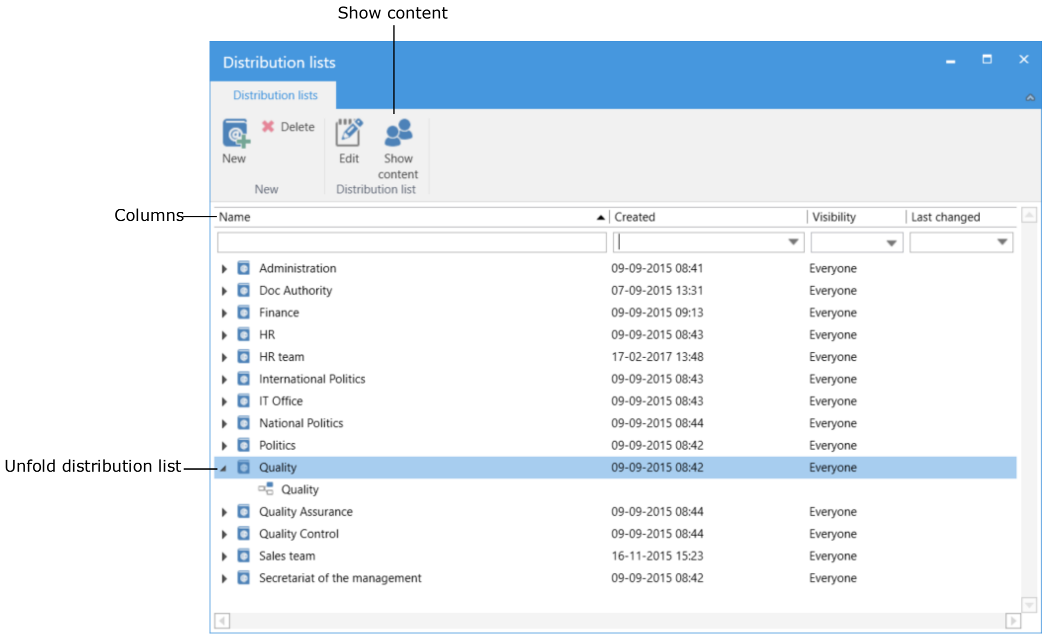


Figure 77: The "Distribution lists" window

The distribution list's content is displayed by expanding the node. For a more detailed overview of a distribution list, select a list and click on **Show content** in the ribbon. This opens the dialogue "Show content: [Distribution list]" that shows the content of the distribution list at the time of opening.

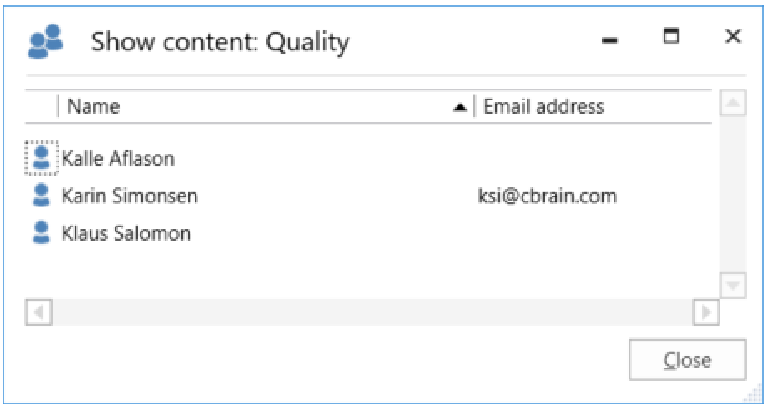


Figure 78: The dialogue "Show content: [Distribution list]"

Create a distribution list

Click on **New** in the "Distribution lists" window to create a new distribution list.

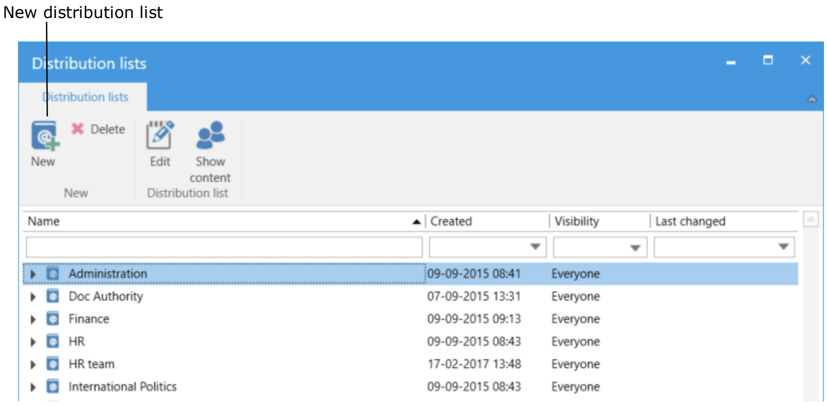


Figure 79: Create a new distribution list

The "New distribution list" dialogue opens. Give the distribution list a name and select the list's visibility using the "Who can see the list?" drop-down menu. Select "Me" for a private list, and "Everyone" to create a shared list.

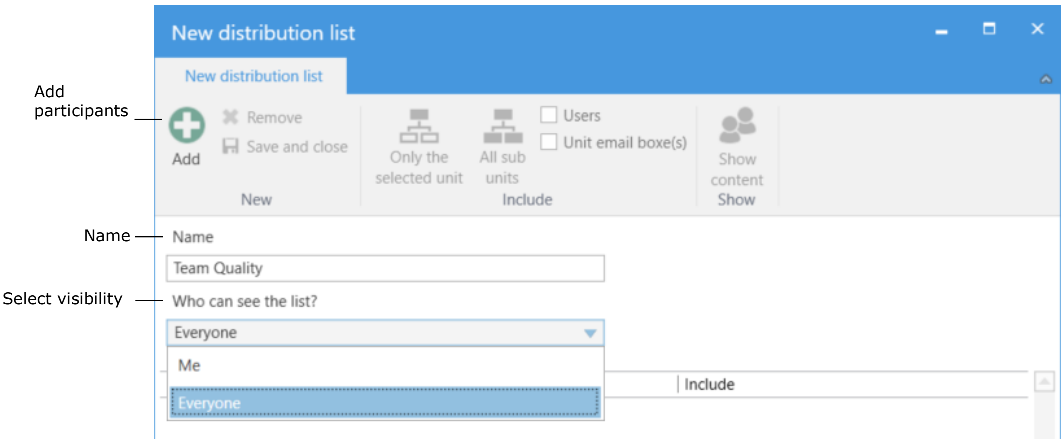


Figure 80: The "New distribution list" dialogue

Click on **Add** to select units and users (participants) to add to the distribution list.

Select the participants for the distribution list in the "Select participants" dialogue. Add a participant by either double-clicking on the participant or select the participant and click on **Add participant(s)**.

It is also possible to perform an advanced search for participants by clicking on **Advanced search**. For more information on advanced searches, see *F2 Desktop – Searches*.

Click on **OK** to finish.

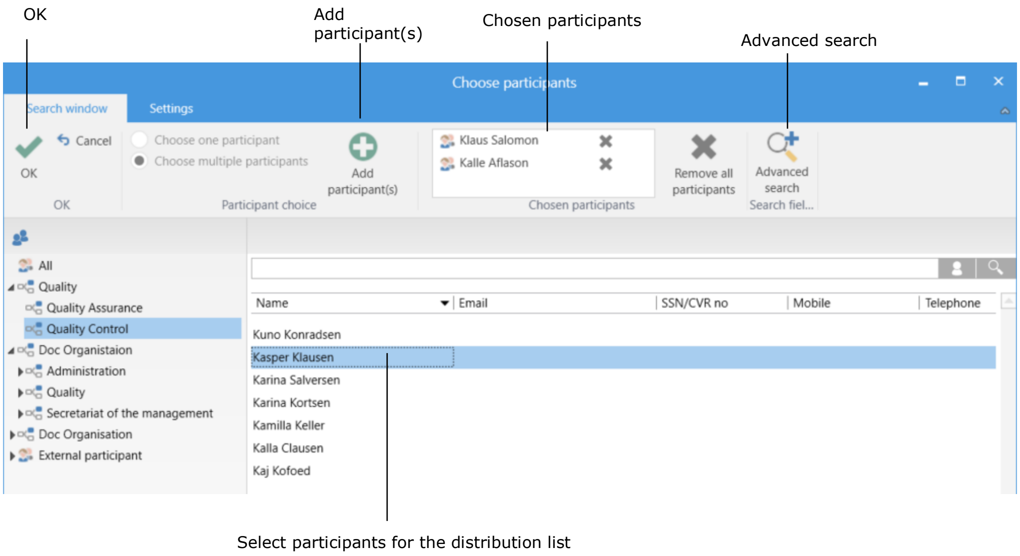


Figure 81: Selecting participants for a distribution list

Click on **OK** in the above dialogue to return to the "New distribution list" dialogue. Here the user can add users and units on hierarchical sublevels to the list by using the functions of the "Include" menu group, shown below.

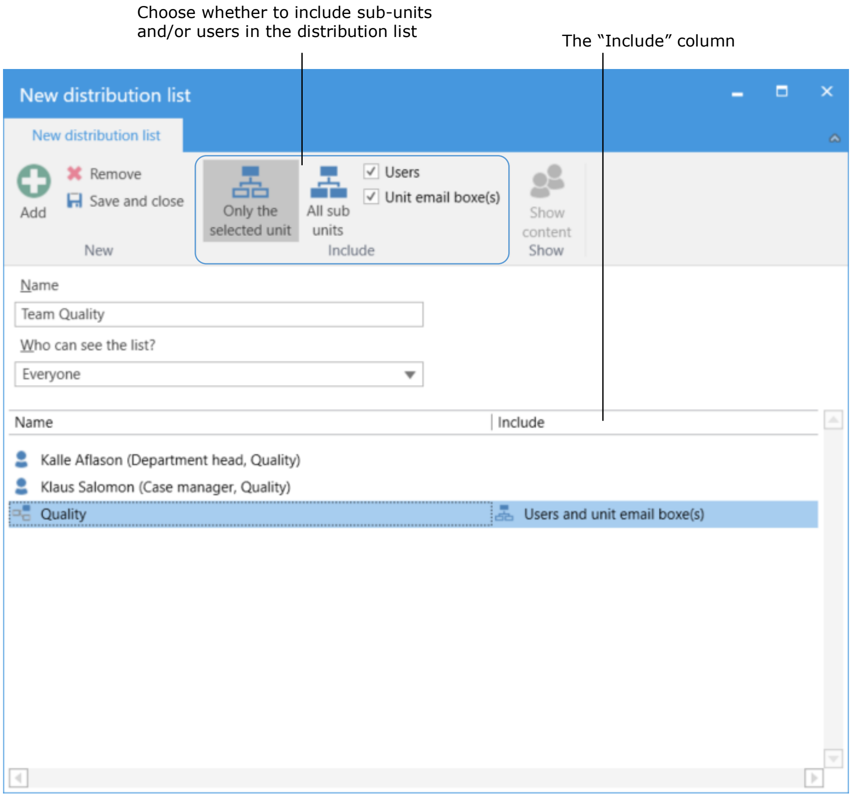


Figure 82: Include units and users from the selected units

Click on **Save and close** to finish editing the distribution list. The distribution list is then created.

Note: Distribution lists must be given a unique name. It is not possible to create two private or two shared distribution lists with the same name.

Note: It is not possible to change a distribution list's visibility after it is created.

Private distribution lists

A user who does not have the "Distribution list editor" privilege can only create new distribution lists with the visibility "Me". A shared distribution list must have the visibility value "Everyone".

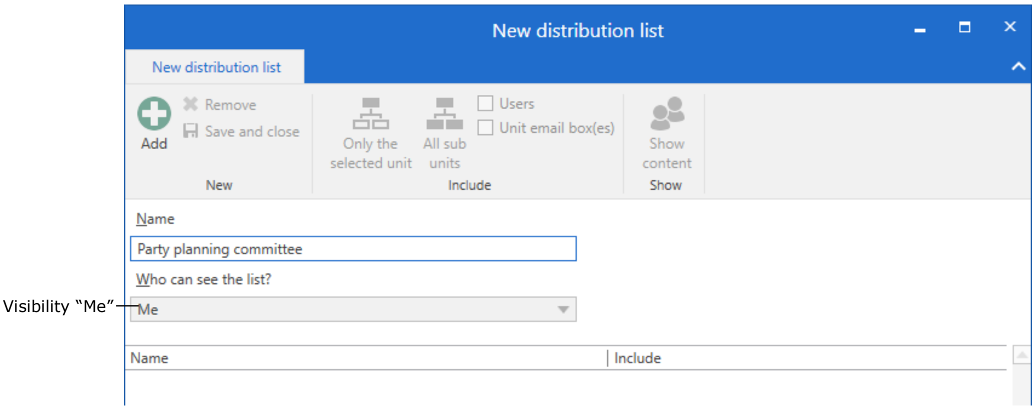


Figure 83: Create a private distribution list

Edit and delete distribution lists

Distribution lists created by the user can be edited and deleted. This is done by selecting a list in the "Distribution lists" window and clicking on either **Edit** or **Delete**.

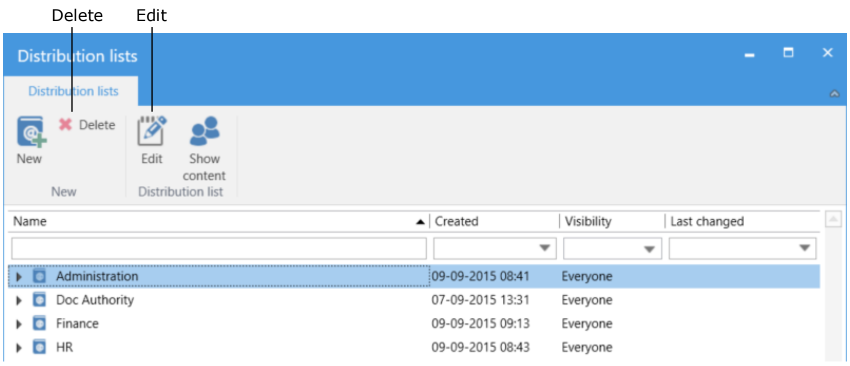


Figure 84: Edit or delete a distribution list

Click on **Edit** to open the "Edit distribution list" dialogue. Here it is possible to add or remove participants by clicking on **Add** or **Remove**.

Click on **Save and close** when the editing is finished.

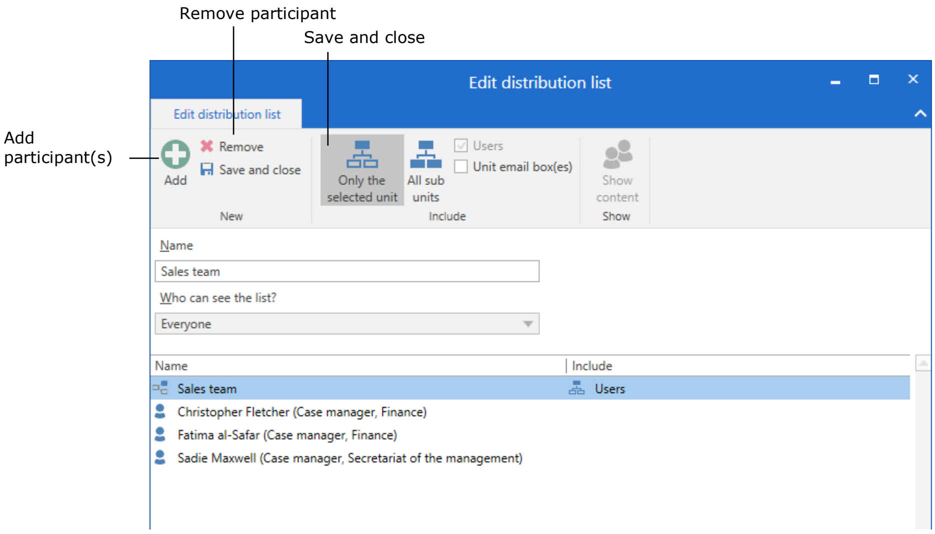


Figure 85: Edit distribution list

To delete a list, click on **Delete** in the "Distribution lists" window to open the dialogue shown below. Click on **OK** to delete the selected distribution list. Click on **Cancel** to cancel the action and keep the distribution list.

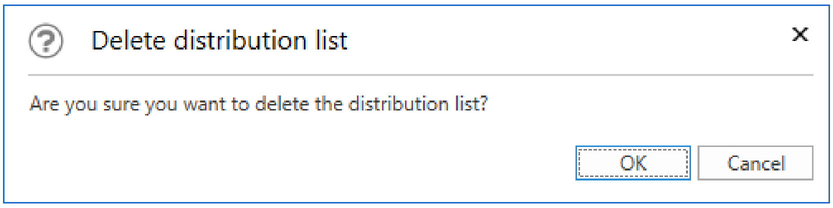


Figure 86: Delete distribution list

Setting up the result list

The result list can be personalised. As with all column views in F2, it is possible to adjust the width and placement of the columns in the result list.

To change the order of columns, simply drag and drop the columns so they appear in the wanted order. The width of a column can be adjusted by pulling it. An overview of columns and their use can be found in the section *Columns – Selecting metadata fields in the result list.*

Drag the column to the desired location.
The blue mark shows where the "Sorting date" column will be placed.

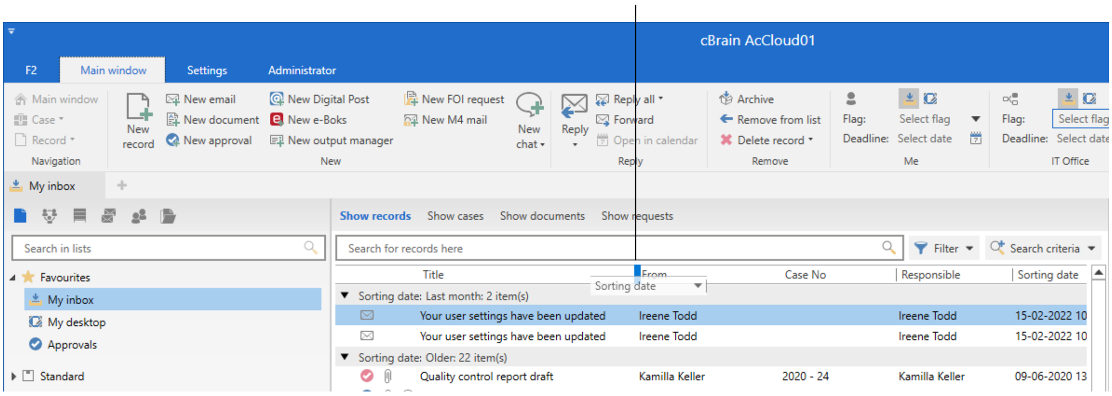


Figure 87: Moving columns in the result list

To sort the result list, click on a column title and the list will be sorted according to the column's values. If the result list is sorted by title, it appears in alphabetical order (either a-z or z-a). If the result list is sorted by letter date, it can be sorted in numerical order (either 0-9 or 9-0).

> **Tip**: The result list can be sorted further by holding Shift and then clicking on a second column. For example, first sort the result list by "Responsible", then hold **Shift** and click on the "Title" column. The list items will then be sorted by each "Responsible" as shown below.

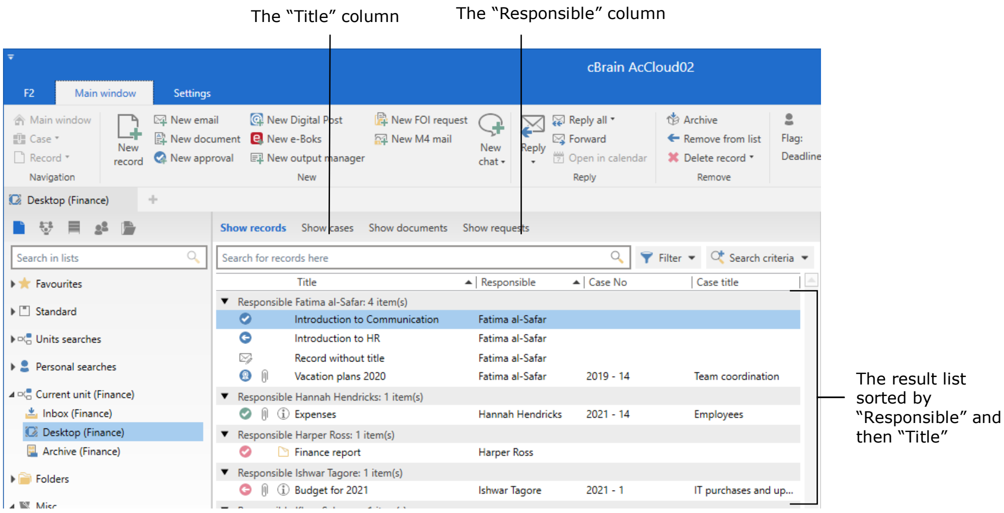


Figure 88: Sorting the columns in the result list

Columns – Selecting metadata fields in the result list

It is possible to select which metadata fields to display as columns in the result list. Right-click on a column, and then click on **Columns** in the context menu that appears. The column selector opens.

The number of columns available may vary between installations. Some of the columns described here only appear if the installation contains one or more add-on modules.

The result list view – whether it is showing records, cases, documents, or requests – determines which columns can be selected.

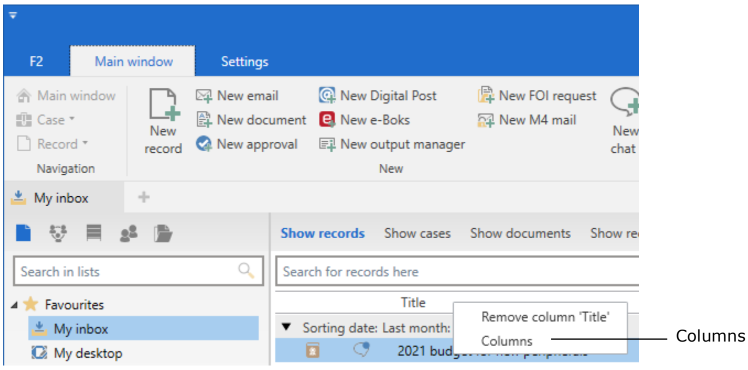


Figure 89: Open the column selector

The figure below shows the column selector. This dialogue provides an overview of all the columns that can be selected. It is possible to search for a column title by using the search field.

By default, all column titles are shown in the dialogue. Tick the box "Show only selected columns" to display the selected columns only.

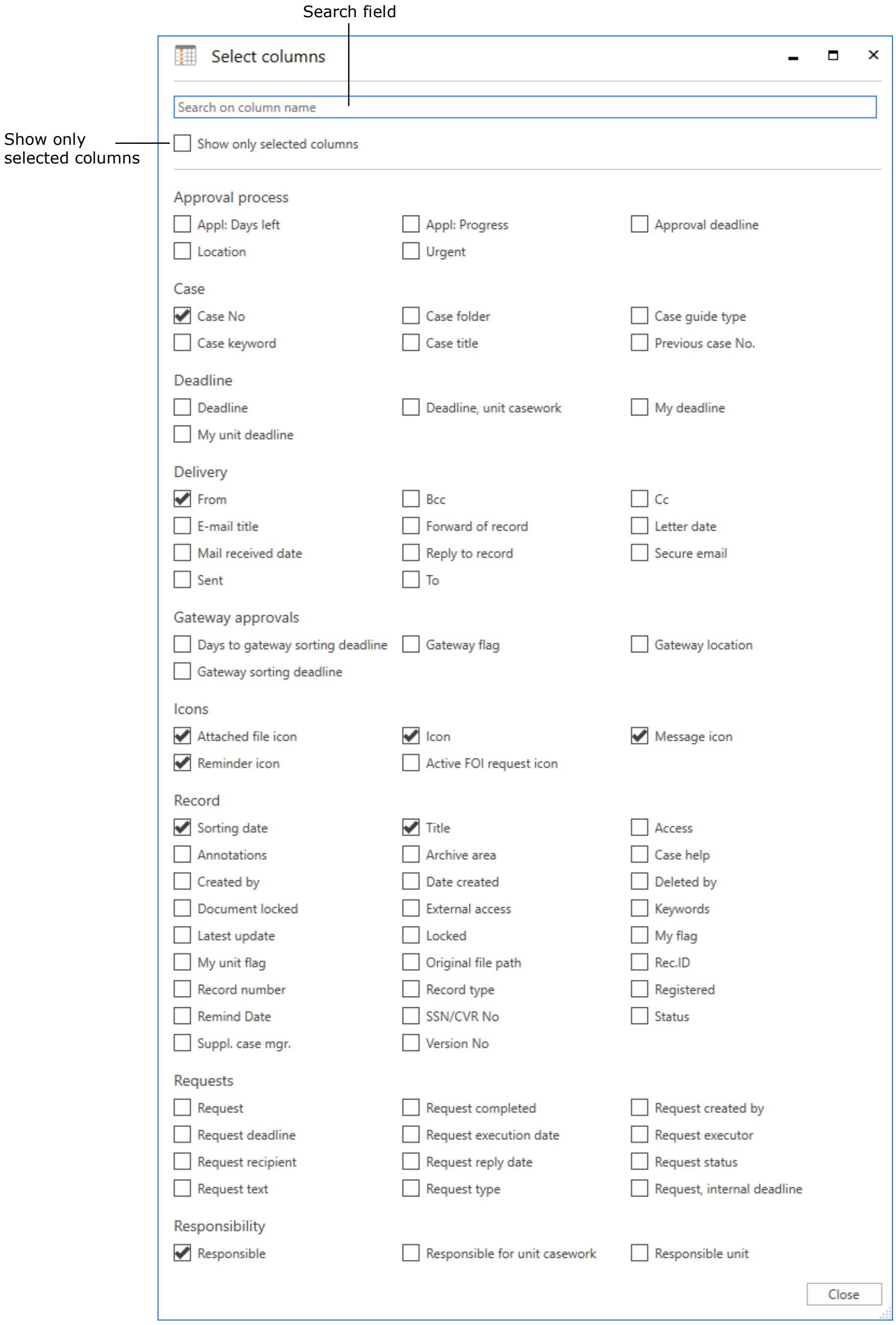


Figure 90: The column selector

Select or deselect a column by ticking or unticking the box next to its title.

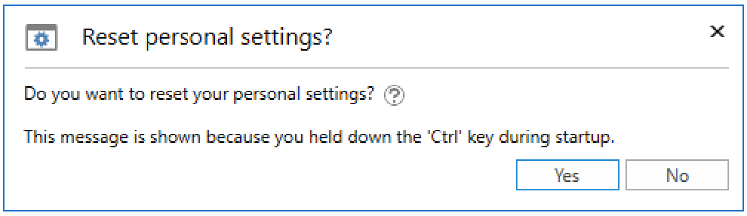
Note: If all columns are removed by mistake, right-click on the blank column bar to access the column selector.

All permanent lists, including personal lists, have their own layout. If the user changes a layout, it is only changed for the chosen list.

A complete list of all the columns and their purposes can be found in *F2 Desktop – Searches*.

Reset personal settings

It is possible to reset all personal settings during login through the "Reset personal settings?" dialogue. Open the dialogue by holding down the **Ctrl** key during login. If the role selector is shown during login, hold down **Ctrl** before clicking **Continue**. If the role selector is not shown, hold down **Ctrl** before clicking **Log in**. Hold down the key until the dialogue opens.



Click the question mark in the dialogue to see a list of personal settings that will be reset.

All personal settings are reset upon clicking **Yes**. The personal settings include the following:

Type	**Description**
General settings	• Settings from the "Setup" dialogue with the exception of "Out of office" and "On behalf of me". • The position and size of windows. • Menu items in the "Quick access" toolbar.
Settings in the main window	• Personal grid settings. • Whether advanced search is enabled and where the case list is displayed. • What the result list displays (records, cases, documents, or requests) on different lists. • Favourite searches • Preview settings for different lists. • Width of the list panel. • Which lists are expanded in the list panel.
Local storage (cache) of	Local storage of: • Records. • Participants, including suggestions. • Cases, including suggestions. • Related searches in context menus.

Type	Description
Misc	• Width of the panel with case folders in the case window. • Whether the ribbon is minimised in different windows. • Whether to play the start-up video, if any.

Configurations

F2 can be configured to fit the needs of the individual organisation. The following functions can be configured in cooperation with cBrain:

- Enable the context menu option of viewing record documents and HTML attachments in compatibility mode for situations where email records are not displayed correctly. Note that spell checker is disabled in this mode.
- Set the time zone to that of the F2 client or the server.
- Disable the option of creating a report when deleting cases. When this configuration is in effect, the associated setting is also disabled for users with the rights to delete cases.
- Toggle the visibility of the simple email settings in the "Settings" dialogue.

List of Figures