F2 Desktop

The Main Window

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.

The main window’s structure

The main window is what users see when logging into F2. Here users keep track of their tasks, read incoming emails, chats, and requests, search for specific records and cases, create records for internal or external communication, etc. The users’ lists and personal searches are also found here.

F2’s main window is shown below.

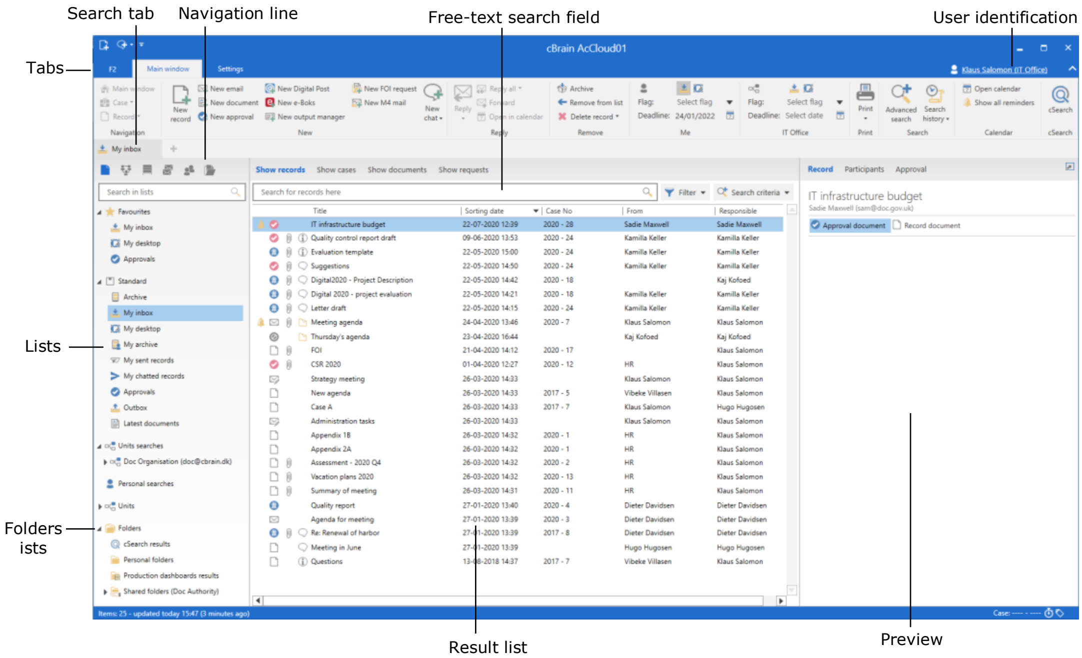


Figure 1: The main window structure

In the main window, users organise their work and receive incoming communication. From the “Archive”, it is possible to search for records and cases and create dynamic lists.

F2’s layout resembles that of ordinary email clients, and records and email records can be previewed from the main window to help create an overview. Additionally, the main window lets users access the “Archive” directly via the search function and the lists. The main window serves as the system start page on which users can access e.g. general settings as well as their inbox, desktop, and archive.

Any information generated or received in F2 is stored in F2’s central archive only. The lists are actually archive searches based on metadata and the user’s search phrases. This means all data is only stored once in F2, in the “Archive”.

The main window has three default tabs: “F2”, “Main window”, and “Settings”. Each tab has a ribbon consisting of several menu groups. From these the user has access to a number of menu items used for navigation, performing actions, and managing the window layout.

Farthest to the right is the user identification showing the user’s name and current unit among other things.

The search tabs of the main window are used to perform searches and having multiple searches open simultaneously. For further information, see the *Search tabs* section.

The main window also includes a free-text search field for general data searches in the "Archive" or one of its lists. It is possible to display additional search fields.

The left side of the main window displays several lists, e.g. "Favourites" under which the user can add frequently used lists or personal searches. The lists are used for displaying a particular subset of data from the "Archive".

The user can also create personal lists not visible to anyone else. These personal lists are displayed along with the default lists on the left side of the main window. By clicking on a relevant list, the user can navigate to a desired record, case or document.

Below the lists F2 displays its folders, which are utilised by the user for manual organisation of records into private and shared folders.

Next to the lists and folders, F2 displays what is known as the result list. The result list shows the content of a chosen search list, i.e. the records, cases, or documents. Read more about working with records, cases, and documents in the section *Working with records, cases and documents in the main window*.

With F2's preview enabled, the user can view a PDF version of any record or document in the result list. The preview can be displayed in a window next to or below the result list depending on the user's personal settings and setup.

Above the lists and folders of the main window is the navigation line from which it is possible to switch between displaying records, meetings, other inboxes and contacts (F2's participant register). The functions displayed depend on the number of F2 add-on modules included in the F2 installation.

Introduction to the content of the main window's tabs

The different tabs of the main window are described below.

The "F2" tab

Click the "F2" tab to open the F2 menu, which contains several functions pertaining to the general use of F2.

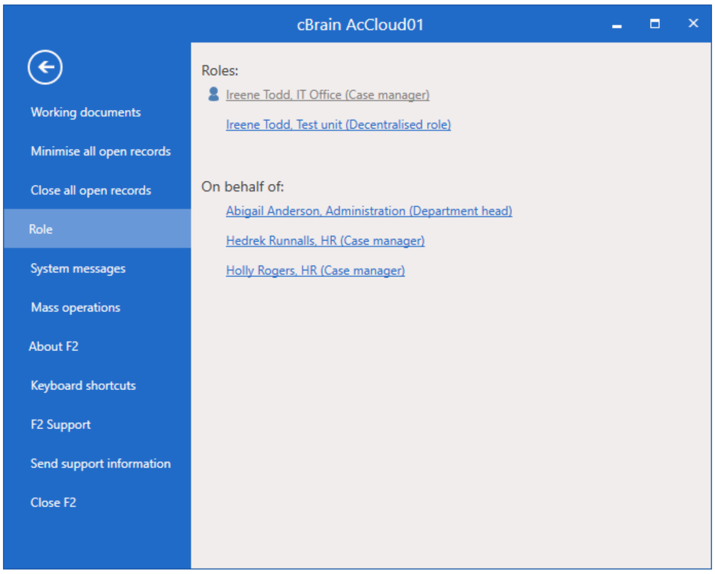


Figure 2: The F2 menu

The F2 menu contains the following tabs:

Tab	Description
"Working documents"	Provides an overview of open documents in F2 with pending changes that are not yet saved to the database.
"Minimise all open records"	Minimises all open record windows.
"Close all open records"	Closes all open records. If an open record has unsaved changes, the dialogue "Save changes?" appears. After the user responds to this dialogue, the record will close.
"Role"	Users with several job roles in F2, including on-behalf-of rights, can switch between roles here.
"System messages"	Provides an overview of previous and current system messages in F2.
"Mass operations"	Shows the last 20 mass operations executed by the user.
"About F2"	Information about version number, etc. The F2 protocol association (normally an f2p:// link) is remade here. This is done to ensure that an F2 link opens in the correct F2 Desktop client, e.g. after switching between F2 production, archive or test systems.
"Keyboard shortcuts"	Opens a window displaying shortcuts available in F2.

Tab	Description
"F2 Support"	Directs the user to the home page specified in the installation as the support page of the organisation. This is typically an intranet page.
"Send support information"	From here the user can send a log file and a description of any problems experienced to an administrator.
"Close F2"	Shuts down F2.

The F2 menu is also available in the record and case windows. This provides access to relevant items.

The "Main window" tab

All functions relevant to communication, processing, and managing records can be found in the ribbon of the "Main window" tab.

Each menu item in the main window's menu ribbon is described in more detail in the manuals *F2 Desktop – Records and Communication*, *F2 Desktop – Management and Organisation*, and *F2 Desktop – Searches*.

The "Main window" tab

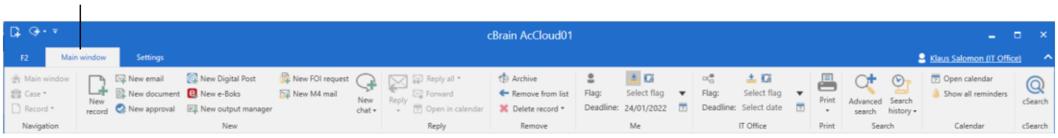


Figure 3: The ribbon of the "Main window" tab

The "Settings" tab

Using the functions of the "Settings" tab, users can adjust F2 to their individual preferences with regard to preview placement and to determine how F2 should handle a number of actions. Read more in *F2 Desktop – Settings and Setup*.

The "Settings" tab

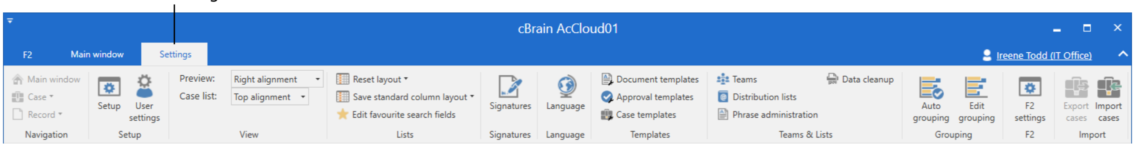


Figure 4: The ribbon of the "Settings" tab

User identification, image and role change

The user identification is found in the top right corner of F2's main window.

The identification shows which user is currently logged into F2 as well as the user's job role and unit. The screenshot to the right identifies the current user as Ireene Todd from the IT Office unit.

Click on the user identification to display a menu with the **Change image** and **Change role** functions. The latter requires the F2 Shared Mailboxes add-on module.

Read more about changing images in *F2 Desktop – Settings and Setup* or about changing roles, also called "fast role change", in *F2 Shared Mailboxes – User manual*.

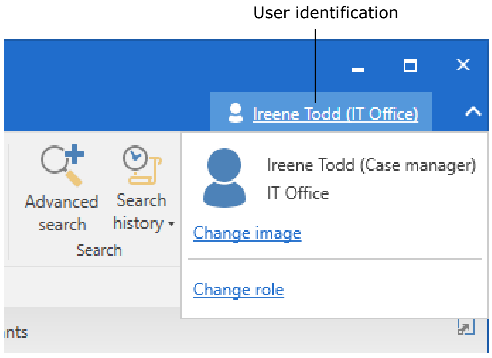


Figure 5: User identification

Note: The corresponding user identification and **Change role** function can also be found in the record and case windows.

Search tabs

As described in the section *The main window's structure*, the main window contains search tabs that are used for performing several searches simultaneously. This is particularly useful when performing related searches.

New search tabs can be opened by clicking on + or by using the shortcut **Ctrl+T**.

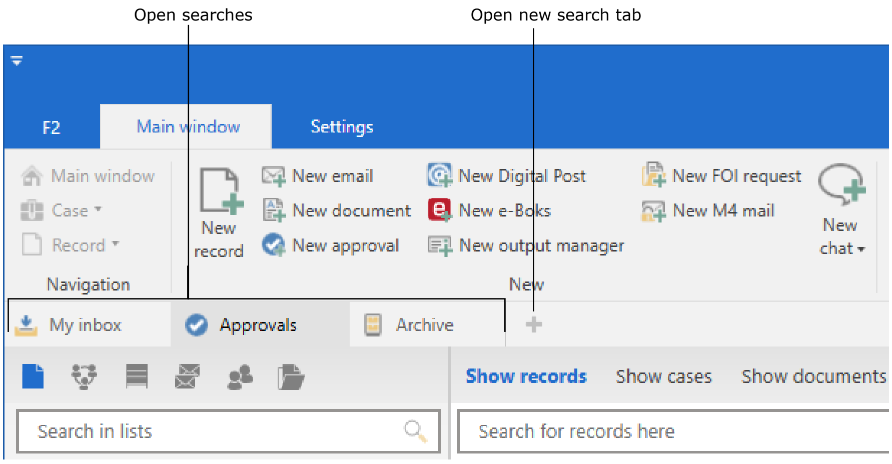


Figure 6: Search tabs in the main window

The search tabs remain open after a role change. However, all search tabs will close when switching from one user to another.

Note: Each open search tab increases the memory usage of the F2 Desktop client. A warning can be configured to appear when the memory usage reaches a certain level. The configuration is performed in cooperation with cBrain.

Open list in a new tab

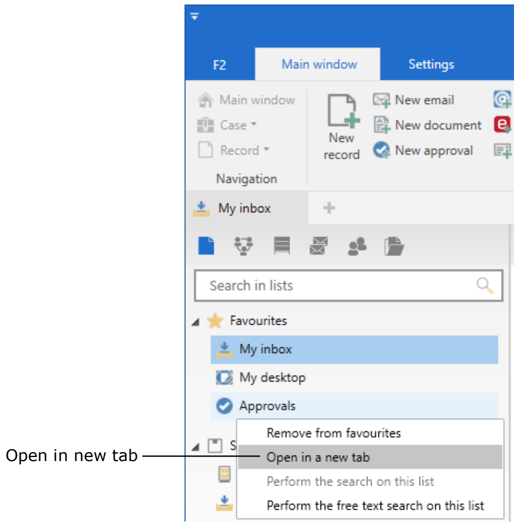


Figure 7: Right-click on list

The **Open in new tab** function can be selected by right-clicking on a list, a production dashboard, or an internal participant. Click on **Open in new tab** to open the selected list in a new search tab.

The main window's navigation line

Above the lists and folders of the main window is the navigation line. Use its icons to switch between different views in F2.

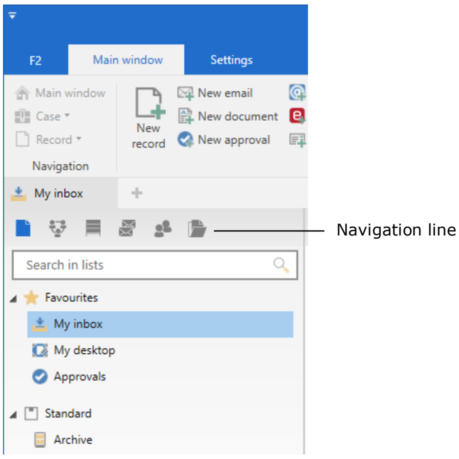


Figure 8: Navigation line

Records: Shows lists and folders.

Meetings (add-on module): Shows meetings to which the user has access.

Production dashboards (add-on module): Shows production dashboards to which the user has access.

Inboxes: Shows unread records in the inboxes of users for whom the user has on-behalf-of rights.

Contacts: Shows the participant register.

Freedom of information requests (add-on module): Shows active and completed FOI requests.

Note: The navigation line icons may vary depending on user rights, add-on modules, and the configuration of F2.

Lists and folders in F2

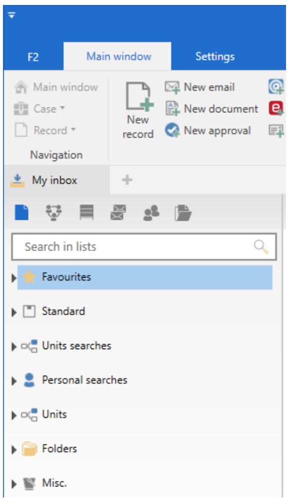


Figure 9: Groups of lists

F2’s standard lists and the personal lists defined by each user are located on the left side of the main window.

Click on a list or folder node to expand it and display its sublists or subfolders.

As shown in the figure on the next page, the list view of the main window is divided into several areas.

Note: The division may vary between installations.

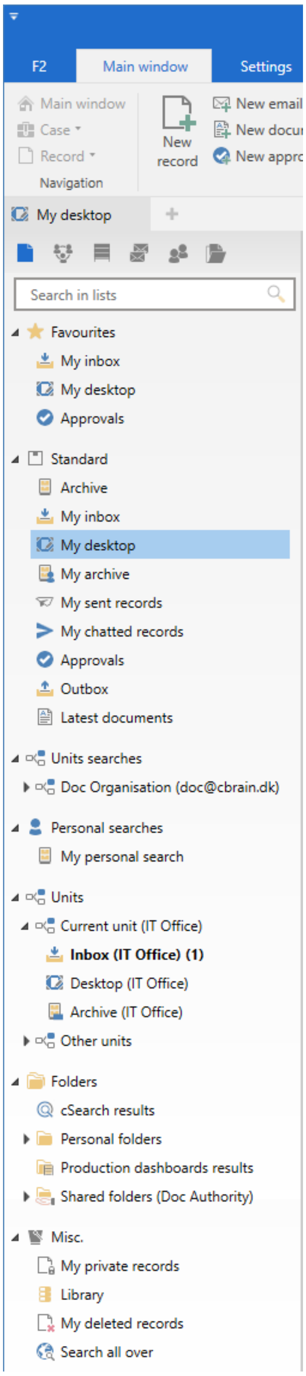


Figure 10: List view

"Favourites": In this node the user can add frequently used lists. These may be predefined lists or lists created by the user. It is also possible to add cases.

"Standard": F2 comes pre-configured with several default lists. As a minimum, F2 includes the lists "My inbox", "My desktop", "My archive", "My sent records", "My chatted records", "Outbox", and "Latest documents".

"Units searches": Contains lists belonging to the user's unit. This node may contain an unlimited number of lists. The lists are adapted to the organisation.

"Personal searches": Here F2 collects all lists created by the user.

"Units": This shows the unit lists (i.e. the unit's inbox, desktop and archive) for all units in which a user has job roles. This means that a user with a job role in multiple units will see two nodes:

"Current unit": Unit lists for the user's current unit.

"Other units": Unit lists for all other units in which the user has job roles, but is not currently logged into, are collected in this node.

Note: If a user only has a job role in a single unit, the "Other units" node is not displayed.

"Folders": This node contains results from cSearch (add-on module), "Personal folders" as known from e.g. Outlook, "Production dashboards results" (add-on module), and "Shared folders", which are visible to everyone.

"Misc.": This node contains private records, deleted records, a shared library, and the option to search in all of F2.

Filtering lists in the main window

Above the lists in the main window is a field for filtering lists. Enter a word in the field, and F2 automatically filters out lists that do not match the query and only displays relevant lists.

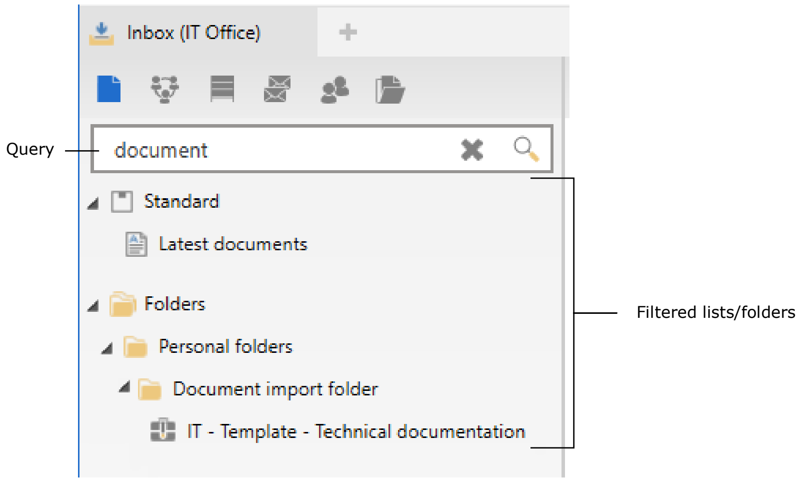


Figure 11: Filtering lists

Predefined lists in F2

The F2 installation comes with a set of predefined lists located to the left in the main window. These lists are configured during the setup of F2, which is why the user's search lists may vary from installation to installation. The groups are divided into nodes with the headings shown on the figure below.

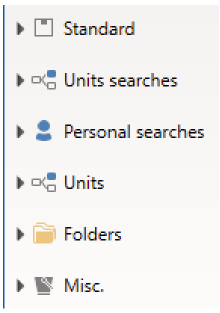


Figure 12: Predefined lists

Each of the main groups are described in detail on the following pages.

Standard lists

The "Standard" node is defined during the installation of F2. The lists generally included in "Standard" are specified here.

"Archive": Contains the total amount of shared data and information in F2. This excludes private, deleted, and library records.

"My inbox": Generally, contains everything a user receives from internal and external senders, such as records, emails, chats, notes, requests, approvals, responsibility-distributed records, etc. Users can move records from other lists to their inbox via personal management.

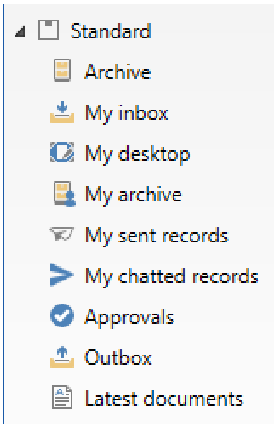


Figure 13: The "Standard" node

"My desktop": Contains all records created by the user. Users can add records from other lists to the desktop via personal management. Email records can be automatically removed from the desktop when sent.

"My archive": Contains all types of records the user is or has been involved in and still can access. The list functions as a subset of the "Archive".

"My sent records": Contains all types of records the user has sent, distributed, allocated responsibility for, etc. to other users or participants internally and externally. This means records on which the user appears in the "From" field.

"My chatted records": Contains all types of records on which the user has sent a chat.

"Approvals" (add-on module): Contains a list of all current approvals the user is involved in/is authorised to view.

"Outbox": Shows all active deliveries. When a delivery has been sent, it is automatically removed from the "Outbox" and appears in "My sent records" instead.

"Latest documents": Here, F2 collects links to documents recently opened by the user.

Units searches

"Units searches" contains a number of lists associated with the user's unit. Here, each organisation defines a number of relevant lists that all the unit's users in F2 may access. Unit searches are created by a user with the "Search administrator" privilege.

These lists support the unit's daily work in F2, such as communication and task management.

In the figure below, the "Units searches" node displays an organisation, the "Doc Organisation". The lists in this group vary from installation to installation.

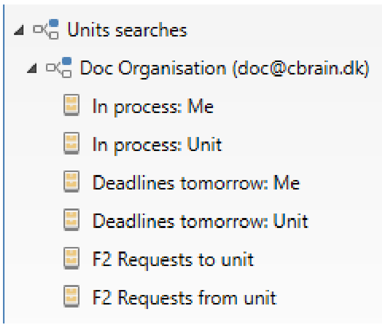


Figure 14: The "Unit searches" node

"In process: Me": Provides an overview of the records for which the user is responsible and which have not yet been completed.

"In process: Unit": Provides an overview of the records which have not yet been completed and for which the unit or users in the unit are responsible.

"Deadlines tomorrow: Me": Provides an overview of the records for which the user is responsible and have the formal deadline "Tomorrow" or sooner.

"Deadlines tomorrow: Unit": Provides an overview of the records for which the unit or a user in the unit is responsible and have the formal deadline "Tomorrow" or sooner.

"F2 Request to unit" (add-on module): This list contains all requests in process that have been sent to the unit or users in the unit.

"F2 Request from unit" (add-on module): This list contains all requests in process that have been sent from the unit or users in the unit.

The above lists are visible to all users in the unit, in this case all users in the "Doc Organisation". Unit searches that are only visible to a single unit, e.g. an office, are shown in a separate subnode named after the unit.

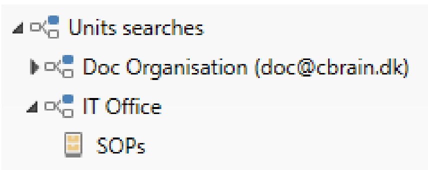


Figure 15: The "IT Office" node

On the left the "SOPs" search is shown, which is only visible to the "IT Office" unit. It is thus shown in a separate node in "Units searches".

Personal searches

The "Personal searches" node contains search lists created by the user. The figure below shows two personal searches, "Work list" and "Projects 2022".

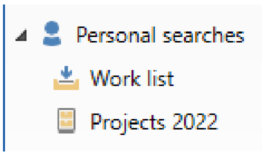


Figure 16: The "Personal searches" node

The lists in the "Personal searches" node vary from user to user. All searches saved by a user are placed in this group. The user determines the name and the period of time a certain list is displayed here. Each list can be renamed or deleted by the user.

Units

For each unit in which the user has a job role, it is possible to view unit lists (i.e. the unit's inbox, desktop and archive). For more information, see the *F2 Shared mailboxes* manual. This means that a user with job roles in several units will see two nodes:

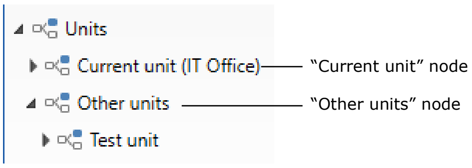


Figure 17: "Current unit" and "Other units"

"Current unit" shows the user's current unit.

"Other units" is a node that compiles all other units in which the user has job roles but is not currently logged into.

Each unit's "Inbox", "Desktop", and "Archive" lists are displayed in the nodes as shown below. This lets the user see all incoming data in other unit mailboxes without having to switch roles. All users in a unit can manage the contents of the "Inbox" and "Desktop" using the unit management function described in *F2 Desktop – Management and Organisation*.

Note: If a user does not have job roles in several units, only the "Current unit" will be displayed.

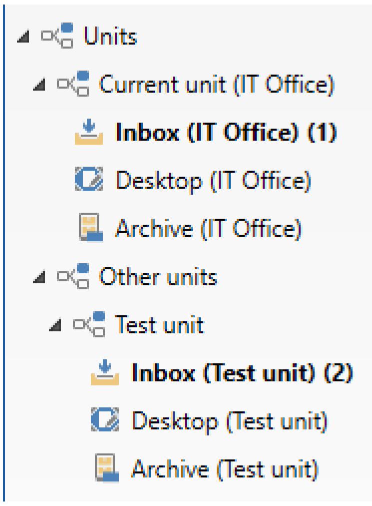


Figure 18: The "Units" node

"Inbox" (the unit's inbox): Contains incoming records that are sent or allocated to the unit. This includes external emails, records sent internally, records for which the unit is responsible, and approvals in which the unit is an approver. The inbox can serve as the unit's distribution centre for incoming records, allowing users to divide tasks between them.

"Desktop" (the unit's desktop): Provides an overview of records which the unit is working on. Records are not moved to the unit desktop automatically, so they must be moved to the list manually via unit management.

"Archive" (the unit's archive): Contains all records which the unit and its users have opened. The list shows an excerpt of the "Archive" that the unit is or has been involved in and can still access.

The nodes can be collapsed and expanded at the user's discretion. The number of unread records in the user's unit inboxes are added up depending on the node expansion level.

Below are examples of collapsed nodes:

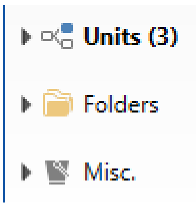


Figure 19: Nodes collapsed

If the "Units" node is collapsed, the total number of unread records for all unit lists is displayed.

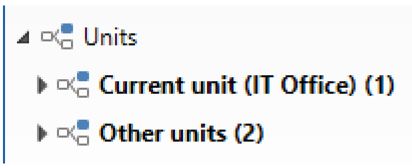


Figure 20: The unit nodes

To the left, the "Units" node is expanded to show all unit subnodes. The number of unread records is shown for each unit.

Note: The maximum number of unread records shown for each inbox is 99. If there are more than 99 unread records in an inbox, "99+" will be displayed by default.

Decentral units

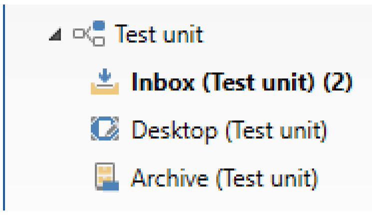


Figure 21: Decentral unit

If the user has a job role in a decentral unit, its unit lists (i.e. the decentral unit's inbox, desktop, and archive) are also displayed as a subnode of the "Units" node. Decentral unit lists are displayed like any other unit list in the main window.

Miscellaneous lists

The "Misc." node contains the following lists:

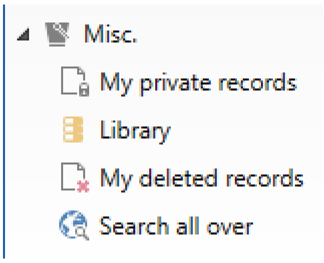


Figure 22: The "Misc." node

"My private records": A user's private list for personal emails and information.

External emails sent to the user's inbox can be moved to "My private records", but only if the user does not in any way add further metadata to these records. If any metadata is added or updated either automatically or manually, the record cannot be moved to this list.

If a user wishes to send a private email, it is recommended to do so from this list.

"Library": This is an archive used for knowledge sharing in the organisation. All users can create records here, but it is not possible to create subfolders. This list can be accessed by all users.

"My deleted records": The user's personal recycle bin for deleted records. In cooperation with the organisation, cBrain configures the period of time a deleted record stays in the bin. If a record is deleted by mistake, it can be restored using the "Restore record" function.

"Search all over": All records placed in the "Archive", "My private records", "Library", and "My deleted records" are made available for a search.

However, the search is limited to records to which the user has access.

Folders in list view

The "Folders" node includes fixed searches, folders for any add-on modules, and folders managed by the user. This lets the user organise records into relevant contexts. The folders are displayed in F2's list view on the left side of the main window.

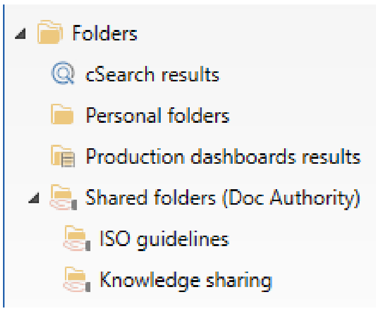


Figure 23: The "Folders" node

"cSearch**"**: The "cSearch results" folder contains results from searches performed using the search tool cSearch (add-on module). For further information, see *F2 cSearch – User manual*.

"Personal folders": In this folder, the user can create a number of folders and subfolders that are visible only to the user. It is also possible to add cases. Further information about the use of folders and cases can be found in the section *Add cases as folders in the main window's folder structure*.

"Production dashboards results": This folder shows records from a management cabinet, which is an add-on module for F2.

"Shared folders": This folder is shared with all users under the same authority. Users can create, move and remove folders, and add cases. Only empty folders can be moved or removed.

Below is a description of how to manage personal and shared folders. The procedure for the two types of folders is identical.

Create new folder

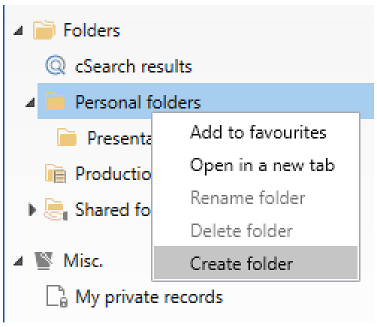


Figure 24: Create folder

Right-click on the folder in which the new folder is to be created.

Click on **Create folder** in the context menu. Specify the name of the new folder.

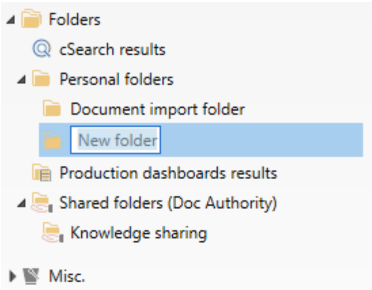


Figure 25: New folder

Note: It is possible to create a folder structure with several levels. The procedure is the same as when creating a new folder. Right-click on the desired folder to create a subfolder.

Rename folder

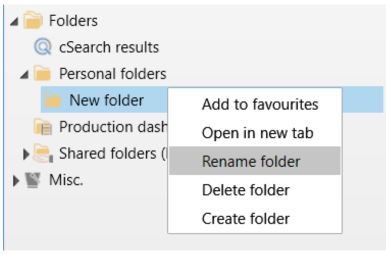


Figure 26: Rename folder

Right-click on the folder and select **Rename folder** to change its name. Then enter a new name.

Delete folder

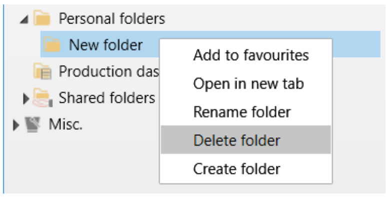


Figure 27: Delete folder

Right-click on a folder and select **Delete folder** to delete it.

The folder can only be deleted if it contains no shortcuts to records. F2 asks for confirmation before deleting the folder.

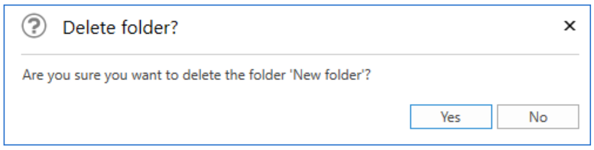


Figure 28: Confirm folder deletion

If the user confirms the deletion of a folder that is not empty, the message below is displayed.

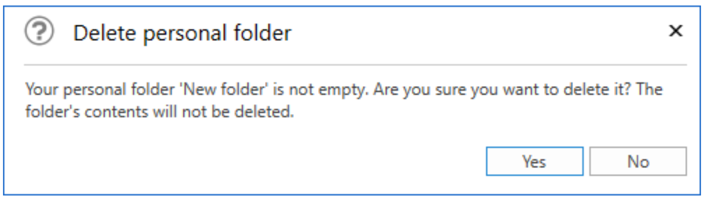


Figure 29: Delete personal folder

Note: A shared folder may contain records that are invisible to the user due to their access restriction. This means that a folder may appear empty without actually being empty.

Add to favourites

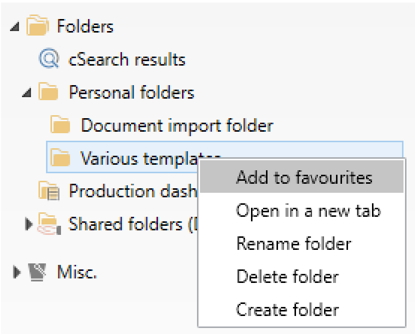


Figure 30: Add to favourites

A folder can be added to the "Favourites" list, which is each user's personal list view of frequently used folders and lists.

To add a folder to "Favourites", right-click on the desired folder and select **Add to favourites**. The folder is then added to the "Favourites" list.

Move folder

To move a folder, click on it and drag it with the mouse to a new location. Moving a folder retains any shortcuts to the folder's records.

Create a shortcut to a record in a folder

To link records to folders, drag and drop them from the main window's result list to the desired folder.

A record can be added to an unlimited number of folders. F2 creates a shortcut in each folder.

Note: Records can also be moved to the "Personal folders" and "Shared folders" top nodes.

The following dialogue appears when the user drags a record to a folder.

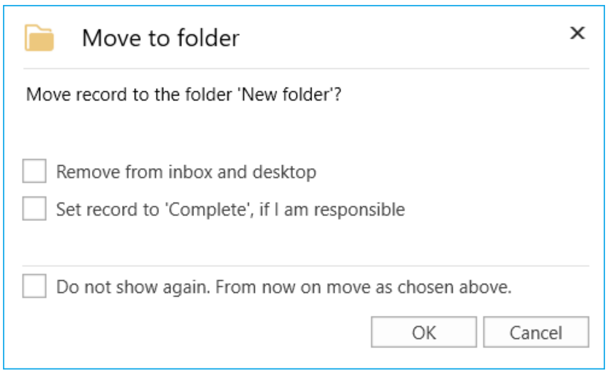


Figure 31: Move record to a folder

When a shortcut is created in the chosen folder, the user must also decide if the record should be set to completed and moved to the "Archive".

The "Move to folder" action can be cancelled by clicking **Cancel** in the dialogue.

Remove record from folder

When a folder is open in the main window, the **Remove from list** menu item on the main window ribbon is replaced by **Remove from folder**, which removes selected records(s) from the current folder.

The shortcut **Ctrl+E** can also be used to remove records from folders.

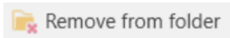


Figure 32: The "Remove from folder" menu item

F2 asks for confirmation before the record is removed from the folder.

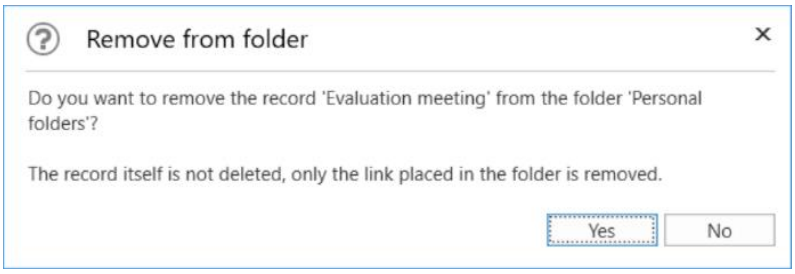


Figure 33: Remove record from folder

Add cases as folders in the main window's folder structure

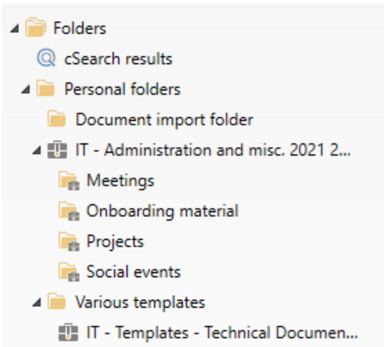


Figure 34: Cases added to folder

Cases can be added to personal and shared folders in the main window's list view.

A case is added to a folder by dragging it from the result list to the desired folder in the list view. When the case is dropped onto the folder, it appears with a case icon, title and case number in the folder as shown to the right.

Any subfolders on a case can be expanded and collapsed in the folder structure, but note that case subfolders cannot be created, deleted or renamed here.

The case is automatically updated when records are added to or removed from the case.

Working with records, cases and documents in the main window

In F2 it is possible to perform a number of tasks directly from the main window. The next sections describe the functions that can be accessed via the context menus and preview of the main window. The number of available functions for each user depends on the organisation's setup and said user's privileges in F2.

Right-click functions for records

Right-click any record in the main window's result list to access the following functions:

Icon	Function	Description
	Open record	Opens the record window of the record selected in the result list.
	Open case	Opens the case window of the case to which is the selected record is attached.
	New	Creates a new: • Record • Email • Document • Approval • Digital Post • e-Boks • M4-post • Output manager • FOI request • New chat • New chat to all
	Reply	This function is active when an incoming email or record that has been sent internally in F2 is selected in the result list. To reply to the sender, click on: • Reply • Reply and include attachments – i.e. keep any received attachments in the email when replying.

Icon	Function	Description
	Forward	This function is active when an incoming email or record that has been sent internally in F2 is selected in the result list. The function opens a new record that is attached to the email to be forwarded.
	Mark as read/unread	Any record can be marked as either read or unread. Records that are read are displayed in a normal font, while unread records are displayed in a bold font. **Note**: Read-markings in a unit list apply to all the unit's users. This means that when a user marks a record as read/unread, the record becomes read/unread for all the users in that unit. A record can be marked as read in one of the following ways: • Open a record in F2 (or a calendar invitation in Outlook). • Display a record in the preview for X seconds (duration depends on a user's personal setup). • Right-click on a record and mark it as read/unread using the right-click menu. When a record is marked as either read or unread in the unit list, it is logged in the record's history. This can be accessed in the record window by selecting the "Advanced**"** tab and clicking on **History**.
	Personal control	F2 shows the menu items for personal control when a user selects a record in the result list, open a record, or becomes otherwise involved in it. These menu items are meant to assist the user in working on the record. The user can choose to include the record in either or both of their personal lists: • Show in "My inbox". • Show on "My desktop".
	Flag (me) (Personal flag)	As part of the personal control a user can set a personal flag on a record. The flag can help the user manage their work on the record. The

Icon	Function	Description
		personal flag can only be seen by the user themself. **Note**: If the number of flags in the installation exceeds a certain limit, the function opens a dialogue for selecting a flag. The flag limit is configured in cooperation with cBrain.
	Flag (unit) (The unit's flag)	Records that automatically appear in the unit's inbox have a menu item for unit. This lets the users in the unit set a unit flag to help manage the unit's work. The unit flag can only be seen by users in the unit. **Note**: The unit flag corresponds to the user's current unit. **Note**: If the number of flags in the installation exceeds a certain limit, the function opens a dialogue for selecting a flag. The flag limit is configured in cooperation with cBrain.
	Delete record	Deletes the selected record if the user has the permission to do so. A deleted record is moved to "My deleted records". In cooperation with the organisation, cBrain configures how long a deleted record will stay in "My deleted records". An unshared record can be deleted from F2. A record that is or has been shared can only be deleted from F2 by users with the "Can delete shared records for everyone" privilege. Users without this privilege cannot delete e.g. an internal email record or a record containing a chat, even if the chat has been deleted. For further information, see the *F2 Desktop – Records and Communication* manual.
	Move to private	Moves the selected records from the result list to the "My private records" list.
	Move to library	Moves the selected records from the result list to the library.

Icon	Function	Description
	Access control	This function is used to change the access level on the chosen record. F2 operates with three access levels: • "Involved": The content of the record can only be seen by users who are involved in the record e.g. via participation in a chat. • "Unit": The content of the record can be seen and edited by involved users plus all users in the same unit as the user responsible for the record. • "All": The content of the record can be seen by everyone in the organisation.
	Show access information	Shows which users have: • Read access. • Write access to documents. • Full write access.
	Add record to case	Adds the record(s) selected in the result list to the case without opening the record/records. The function can also be used to copy a record to several cases with one action. **Note**: If more than one record is selected in the main window, it is only possible to move them to one case. The records cannot be copied to multiple cases.
	Remove record from case	Removes the record(s) from a case without opening said record(s).
	Add keywords	Adds one or more keywords to the record.
	Select as answer record to a request	Designates a record as a reply to an existing request.
	Register/ Deregister record	Registers/deregisters the selected record. If the record is attached to a case, it is given a record number on the case upon registration. If the record is not attached to a case, the record is registered and will be given a record number if it is later attached to a case.

Icon	Function	Description
		Note: A registered record can be completed at any time. It does not need to be attached to a case.
	External access	Shares the selected record with external participants. Depending on F2's configuration, the user can choose between: • Open • Partly open • Closed.
	Set record to 'Complete'	Sets one or more records from the result list as complete. If all selected records are already complete, only the "Reopen record" function is active. This function is related to: • The status of the record (in progress/completed) • The status on the unit's case line for records sent internally to the unit.
	Reopen record	Reopens one or more records in the result list.
	Add supplementary case manager	Adds one or more supplementary case managers to the record.
	Change responsible	Changes the responsible user/unit on the record.
	Reminder	• **Add reminder** A user can create a reminder for themself on a record. Reminders automatically pop up at the chosen time. • **Edit reminder** Edit the reminder. • **Remove reminder** The reminder is removed.
	Show notification	This function shows any notifications on a record such as when a user has been added as a supplementary case manager, or if an approval flow requires the approval of a user.

Icon	Function	Description
	Reports	A report is created by selecting records in the result list. This function lets the user do the following: • **Create FOI request** The Freedom of Information request report can be adjusted by deselecting records and documents before the final version is created. It is possible to comment on each individual document that has been selected. Read more about this function in *F2 FOI Request – User manual*. • **Create report** • **Export to Excel**
	Copy link to this record	Copies the record ID which can then be inserted into other records.
	Remove from Outbox	Removes failed deliveries from the outbox. The delivery will still be located in the "Archive". **Note**: The menu item is only available in the "Outbox" list.
	Export search result to Excel	Exports a search result to Excel where it can then be processed. This function can be used in connection with FOI requests.
	Related	The **All participants on these records** function is used to search for the participants involved in one or more of the records selected in the result list. Click on **Reread related searches** to update the search options made in connection with the add-on module F2 Related searches.

Right-click functions for cases

Right-click any case in the main window's result list to access the following functions:

Icon	Function	Description
	Open case	Opens the case window for the selected case.

Icon	Function	Description
	New	Creates a new: • Record • Email • Document • Approval • Digital Post • e-Boks • M4 Mail
	Set case to 'Complete'	Changes the case status from "In progress" to "Completed".
	Reopen case	Changes the case status from "Completed" to "In progress".
	Change responsible	Changes the responsible user/unit on the case.
	Add supplementary case manager	Adds one or more supplementary case managers.
	Add participants	Adds one or more participants to the case.
	Add access restriction	This function allows the user to add security groups, units, teams or users to the access restriction on the chosen case.
	Add keyword	Adds one or more keywords to the case.
	Set new deadline	Sets a new deadline for the chosen case. If a new deadline is not chosen, the current deadline will be removed from the case.
	Change journal plan	Sets a new file-plan for the selected case. This function is connected to the add-on module F2 Task guides.
	Set progress code	Sets a new progress code for the selected case. This function is connected to the add-on module F2 Progress codes. For more information, see *F2 Progress Codes – User manual*.

Icon	Function	Description
		Note: If the number of progress codes in the installation exceeds a certain limit, the function opens a dialogue for selecting a progress code. The progress code limit is configured in cooperation with cBrain.
	Set external access	Shares the selected record with external participants. Depending on the configuration the user can choose: • Open • Partly open • Closed.
	Copy link to this case	Copies a hyperlink to the case that can be pasted into records or cases.
	Export search result to Excel	Exports a given search result to Excel, where it can then be processed. This function can for example be used in connection with FOI requests.
	Related	The function **All participants on these cases** is used to search for the participants that are involved in one or more of the cases selected in the result list. Click on **Reread related searches** to update the search options that have been made in connection with the add-on module F2 Related searches.

Right-click functions for documents

Right-click any document in the main window's result list to access the following functions:

Icon	Function	Description
	Show PDF's	Opens the selected document as a PDF file.
	Open	Opens the selected document in the format chosen during setup. The icon changes depending on the file format, e.g. PDF or Word .
	Export file…	Saves the document to the user's computer.
	Open record	Opens the record to which the document is attached.

Icon	Function	Description
	Open case	Opens the case to which the document is attached.
	Properties	Opens the "Properties" dialogue that shows the document's properties. For further information, see *F2 Desktop – Settings and Setup*.
	Copy link to document	Copies a hyperlink to the record to which the document is attached. This hyperlink can be pasted into other records, case metadata or notes, chats, annotations, etc. For further information on inserting hyperlinks, see *F2 Desktop – Records and Communication.*
	Export search result to Excel	Exports a search result to Excel, where it can then be processed. This function can be used in connection with FOI requests.

Mass operations in the main window

It is possible to perform various mass operations in the main window. This is done by selecting several records, cases, or documents at the same time. With the items selected, right-click and choose one of the possible actions from the context menu. These actions are described below.

When a mass operation is performed using the context menu in either the main or case window, a status bar appears in the bottom right corner. In the example below F2 is adding six records to a case.

Figure 35: The status bar for the "Adding records to case" mass operation

> **Note**: If a mass operation cannot be performed on one or more of the selected records/cases, a notification will appear. A notification is always shown when the actions "Reports", "Merge to case participants" and "Close related records" have been completed.

Case help for right-click functions

It is possible to turn on case help for right-click functions for records in the main window. This is configured in cooperation with cBrain. Per default, the case help for right-click functions is turned off.

The "Case help" dialogue is displayed when the following right-click functions are performed on a record in the main window:

- Access control
- Add record to case
- Remove record from case

- Register record
- Deregister record
- External access
- Set record to 'Complete'
- Reopen record
- Add supplementary case manager
- Change responsible.

For further information on case help, see *F2 Desktop – Records and Communication.*

The mass operation dialogue

If the user performs a mass operation in the main window with several records selected, and the case help has not been responded to for one or more of the records, a dialogue will appear.

The dialogue's title is "Mass operations" followed by the operation that caused the dialogue to open, e.g. "Mass operations: Change responsible" or "Mass operations: Add records to case".

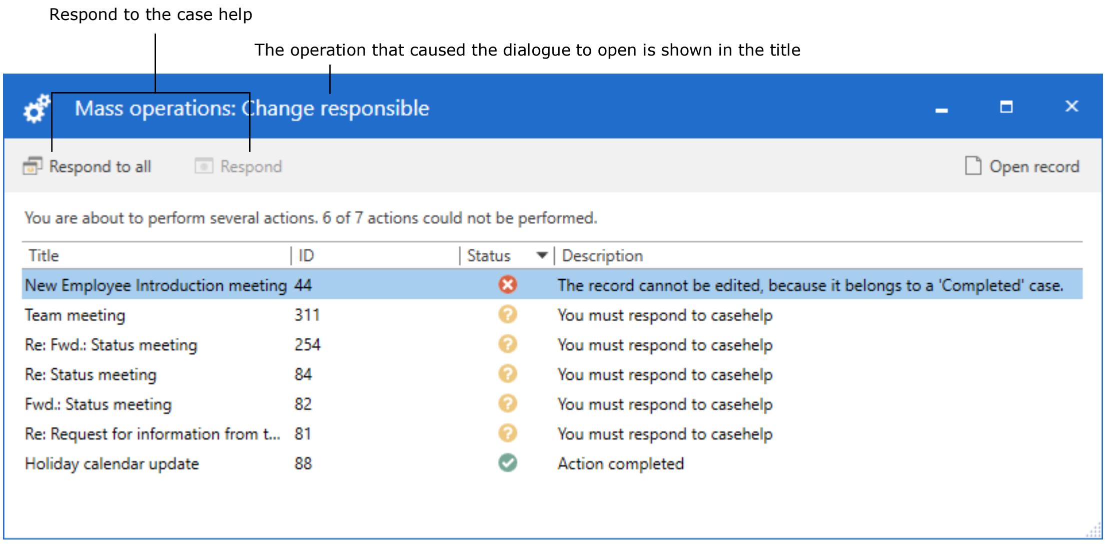


Figure 36: The "Mass operations" dialogue

In this dialogue, the "Status" column provides a quick overview using colour coded icons. Any operation that could not be executed are shown at the top with a red icon. Operations that require the user to act have a yellow icon, and completed operations have a green icon. The "Description" column provides additional details on each record's status.

Manage failed operations by selecting one or more records in the dialogue. Then select one of the available actions:

- **Respond to all**: Respond to the case help for all relevant records, i.e. records with the yellow icon. This opens a new dialogue, "Suggested changes when saving a record". See the section *The case help dialogue "Suggested changes when saving a record"* for more details.

- **Respond**: Respond to the case help for the highlighted record(s). This opens a new dialogue, "Suggested changes when saving a record". See the section *The case help dialogue "Suggested changes when saving a record"* for more details.
- **Open record**: Open the highlighted record(s).

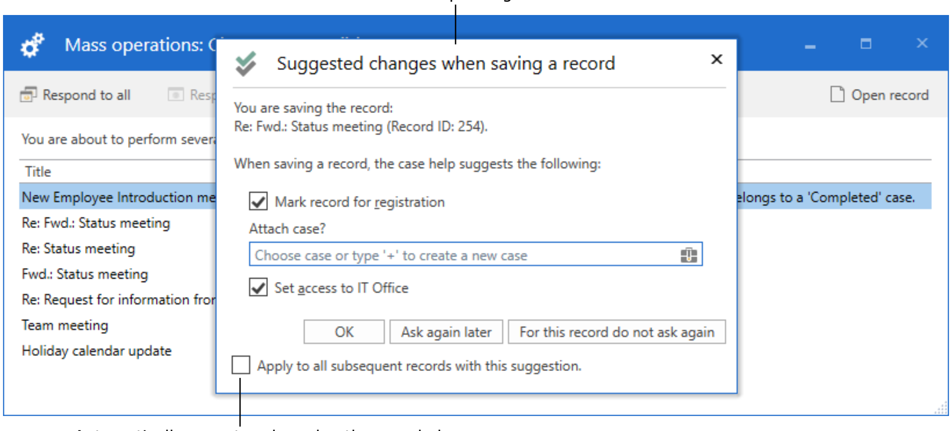
The "Status" for each record will change to the green icon after the case help has been carried out.

This warning appears even if the setting "Show warning when mass operations fail" has been disabled by the user.

The case help dialogue "Suggested changes when saving a record"

When selecting either **Respond to all** or **Respond** in the "Mass operations:" dialogue as described above, a new dialogue opens with suggested changes. In this dialogue, it is possible to automatically apply the changes to all subsequent records. Tick **Apply to all subsequent records with this suggestion** at the bottom of the dialogue to automatically repeat and respond to the case help.

Case help dialogue



Automatically repeat and resolve the case help

Figure 37: Case help for multiple records

In the example above, the case help suggests marking the record for registration, adding it to a case, and changing the access level to "IT Office". Tick **Apply to all subsequent records with this suggestion** and click **OK** to automatically resolve the case help for all failed records listed in the first dialogue.

> **Note**: Only identical suggestions are applied when clicking **OK**. Any case help with other suggestions, such as changing access to another unit or registering the record, will not automatically be resolved. In the same manner, clicking **Ask again later** or **For this record do not ask again** in the dialogue will only be applied to identical suggestions.

Note: It is possible to hide the checkbox **Apply to all subsequent records with this suggestion** through a configuration. Configurations are performed in cooperation with cBrain.

The main window preview

With the main window preview visible, it is possible to see the content of records and documents that are selected in the result list. The preview can be hidden or displayed either next to or below the result list. The preview alignment can be selected on the main window's "Settings" tab.

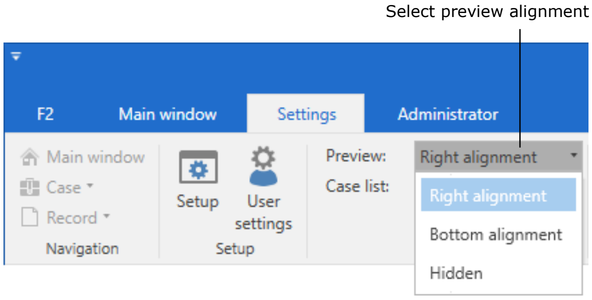


Figure 38: Choose where to display the preview in the main window

For further information on preview settings, see *F2 Desktop – Settings and Setup.*

The preview contains a number of functions to facilitate work with records and documents.

From here it is possible to view and open chats, notes, and annotations on records. It is also possible to navigate between the record, its participants, any approvals (add-on module) and requests (add-on module). See the figure below.

Approvals can be processed from the preview window directly. For further information, see *F2 Approvals – User manual*.

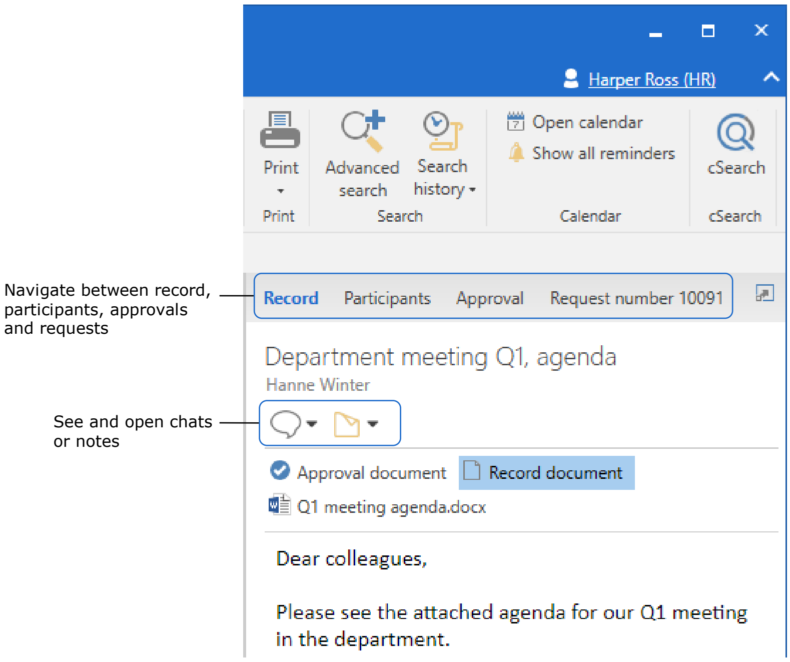


Figure 39: Preview functions in the main window

The following section provides an overview of the main window's additional preview functions.

Right-click functions for documents in the preview

Right-clicking a document in the preview lets the user perform any of the functions below.

Icon	Function	Description
	Show PDF	Opens the selected document as a PDF file.
	Open	Opens the selected document in the format chosen during setup. The icon changes depending on the file format, e.g. PDF or Word .
	Export file…	Saves the document to the user's computer.
	Properties	Opens the "Properties" dialogue that shows the document's properties. For further information, see *F2 Desktop – Settings and Setup*.
	Copy link to document	Copies a hyperlink to the record to which the document is attached. This hyperlink can be pasted into other records, case metadata or notes, chats, annotations, etc. For further information on inserting hyperlinks, see *F2 Desktop – Records and Communication*.

Show properties for participants in the preview

It is possible to go directly to properties for participants and distribution lists from the main window's preview. Right-click on a participant or list and then click on **Show properties**.

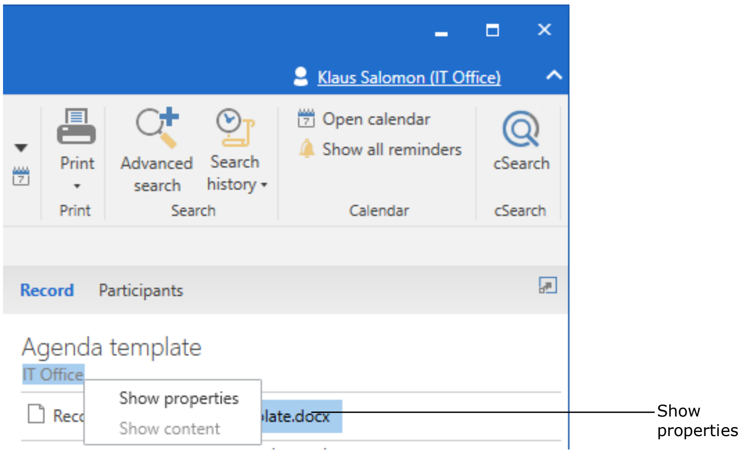


Figure 40: Right-clicking on a participant in the preview

Show distribution list content in the preview

It is possible to view the current content of a distribution list directly from the main window’s preview. Right-click on a distribution list in the “Recipient” field in the preview and then click on **Show content**.

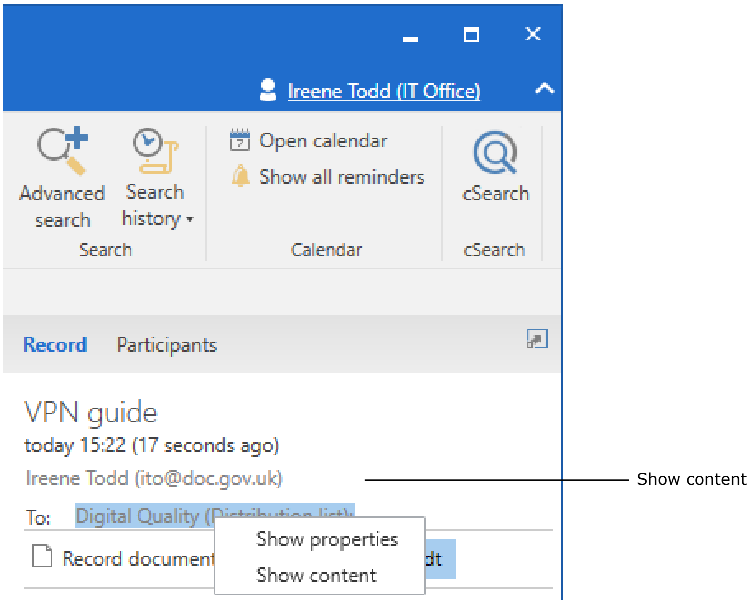


Figure 41: Right-clicking on a distribution list in the preview

A dialogue opens to show the content of the distribution list. See the figure below.

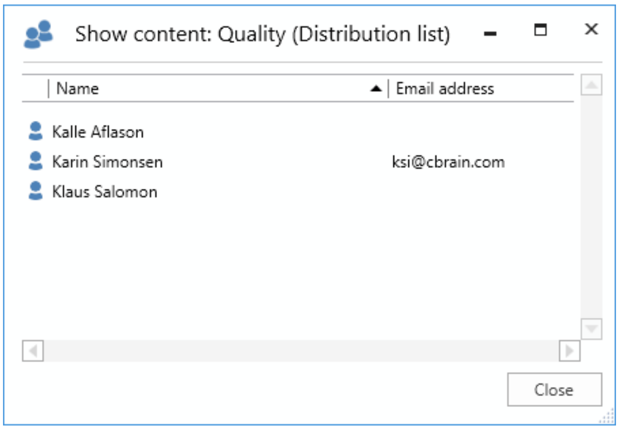


Figure 42: The "Show content" dialogue

The dialogue shows the content of the distribution list at the time when it was opened. Later changes made to the distribution list are not displayed. It may be necessary to close the dialogue and reopen it to e.g. see newly added users.

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

Print document

It is possible to print records and documents from the main window directly by clicking on the **Print** menu item.

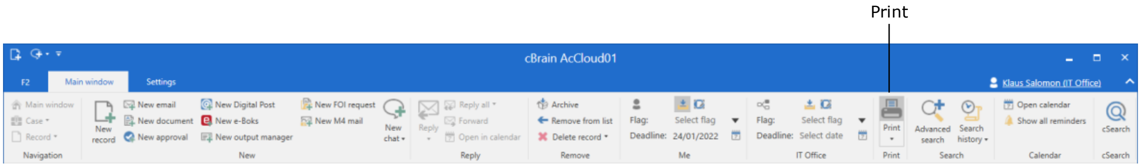


Figure 43: The "Print" menu item in the main window ribbon

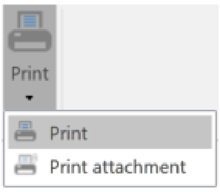


Figure 44: Drop-down menu for "Print"

Select a record and click on the **drop-down arrow** on the **Print** menu item to open a menu with the options **Print** (record document) and **Print attachment**. These functions are described in the section below.

Print the record document

Select a record in the result list and click on **Print**. F2 then generates a PDF file of the record document and opens a print dialogue. The content of the PDF file is determined by a template which can be configured in cooperation with cBrain.

The generated PDF file only contains the record document.

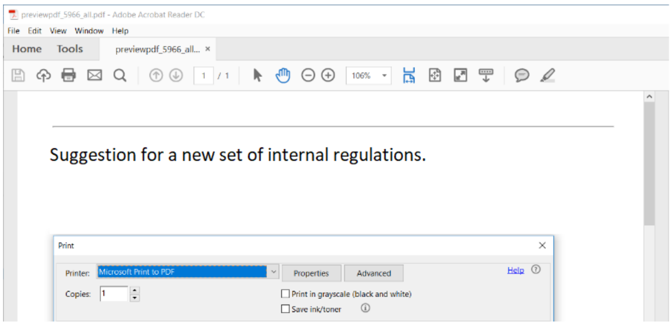


Figure 45: Print record document

Print attachments using the preview

It is possible to print attachments from the main window preview.

Click on a record in the result list to see its preview. Select the attachment to be printed and then click on the **Print** menu item in the main window ribbon.

In the drop-down menu that appears, click on **Print attachment** and the selected attachment will be ready for printing.

Attachments can only be printed individually. It is necessary to click each attachment and print them one at a time. All attachments can be printed using the **Create record as PDF** menu item. This menu item is further described in *F2 Desktop – Records and Communication.*

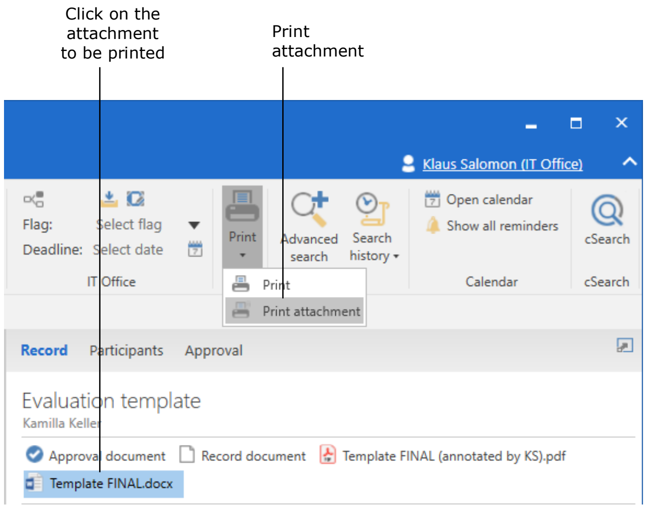


Figure 46: Print attachment from the preview in the main window

> **Note**: If the main window preview is disabled, attachments can still be printed by showing documents in the result list. When showing documents, the record document cannot be printed.

List of figures