F2

Request

Version 9

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Reading guide

This manual is written for users of F2 Request.

The manual contains a short introduction to F2 Request and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

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*.

We hope you enjoy using F2.

Introduction to F2 Request

A request is a method to formally ask a user or a unit to carry out a task.

A request is created in the record window and associated with the open record. When a request has been created, it can be sent to a user or a unit as a formal way of allocating a task. A request sent to a user or unit within an F2 authority is called an internal request.

Three types of requests exist in F2:

- **Internal requests**

  A internal request is a formalised way of requesting that a job be done within an authority.

- **Group requests (add-on module)**

  A group request is sent within one F2 installation, but between different authorities.

- **External requests (add-on module)**

  An external request is sent between F2 systems, i.e. across installations.

This manual focuses on internal requests.

For more information about group and external requests, see the user manuals *F2 Group Request* and *F2 External Request*.

A internal request is always sent to users or units within one F2 authority.

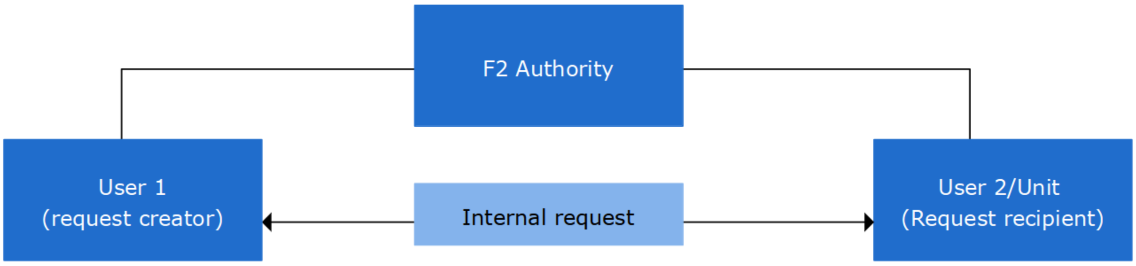


Figure 1: Internal request from a user to a user/unit within one F2 authority

Internal requests

This section describes how a request is created, sent, received, executed, and finalised.

Creating a request

Create a new request by clicking **New request** in the ribbon of the record to which the request should be associated. Several requests may be created on the same record.

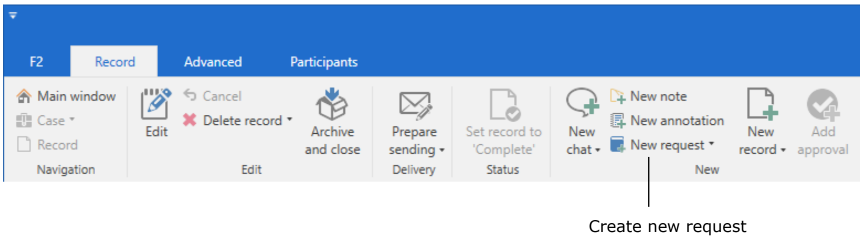


Figure 2: Creating a new request

Note: Requests can only be created on records with the "In progress" status. The **New request** menu item is deactivated for completed records.

Click **New request** to open the "New request" dialogue. The "Return to" field is already filled in with the request creator's name.

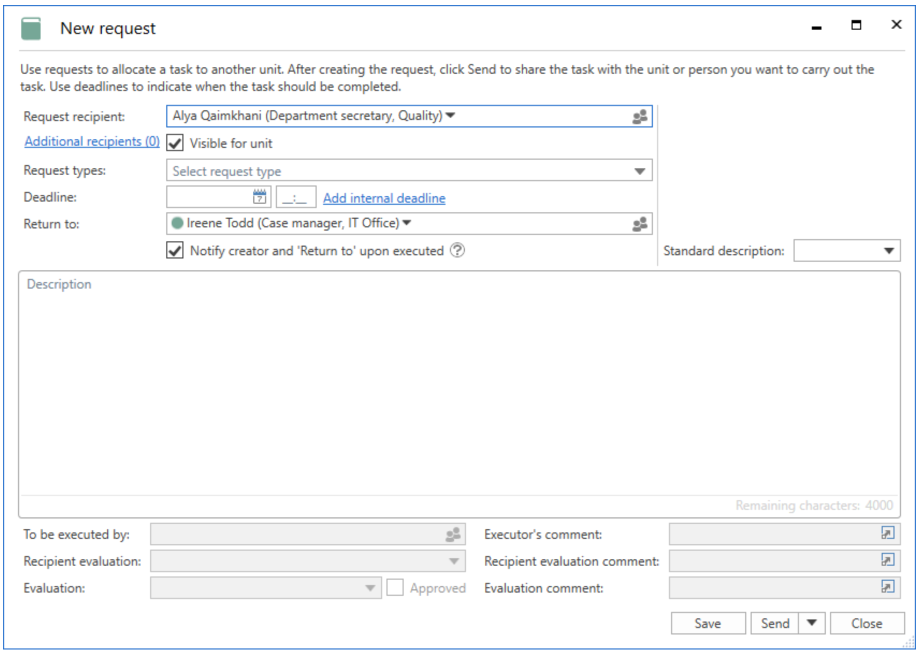


Figure 3: The request window

Note: The "Visible for unit" checkbox next to "Additional recipients (0)" only appears when a user is added to the "Request recipient" field.

Before sending the request, the requester can fill in the following fields.

Field	Description
"Request recipient"	The user or unit who receives the request.
"Additional recipients"	Add more users here if the request is meant for multiple users. F2 then creates a separate copy of the request on the record for each recipient. There is no practical or hierarchical difference between the recipient added in "Request recipient" and those added in "Additional recipients".
"Visible for unit"	Tick this box to make the request visible to users in the request recipient's unit.
"Request types"	Click the **drop-down arrow** to display a list of request types. The options depend on the setup of F2. More than one option may be selected.
"Deadline"	The date (and, optionally, time) indicating the deadline of the request's execution. The deadline affects how and where the request appears in the lists of requester and recipient, allowing users in the organisation to sort requests by deadlines. Enter a date, click on the calendar icon, or write e.g. "+7" to set the deadline to seven days. When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the approval and the approval record if there is no internal deadline.
"Add internal deadline"	The requester, recipient, or executor may add an internal deadline to a request. The internal deadline is primarily used by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed. The request icon changes colour depending on the internal deadline, which is suggested as the deadline for the answer record. The internal deadline is added in the same way as the formal deadline. The internal deadline takes precedence over the formal deadline, except in the request history log whose deadline always adheres to the formal deadline. When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the approval and the approval record if there is no internal deadline.

Field	Description
"Return to"	Shows to whom the request is sent upon execution. When the request is created, the requester is automatically added to this field. If the requester does not want to receive the executed request, they can specify another user here before sending the request.
"Notify creator and 'Return to' upon executed"	Tick this box to have the request appear in the inboxes of the requester and the user specified in the "Return to" field upon execution. **Note**: F2 can be configured to tick this box automatically. This configuration is made in cooperation with cBrain.
"Standard description"	Choose between text templates with predefined texts. The chosen template text is inserted in the description field. **Note**: If no standard description template has been created, this field is not visible. Templates are created by cBrain.
"Description"	Text informing the recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.

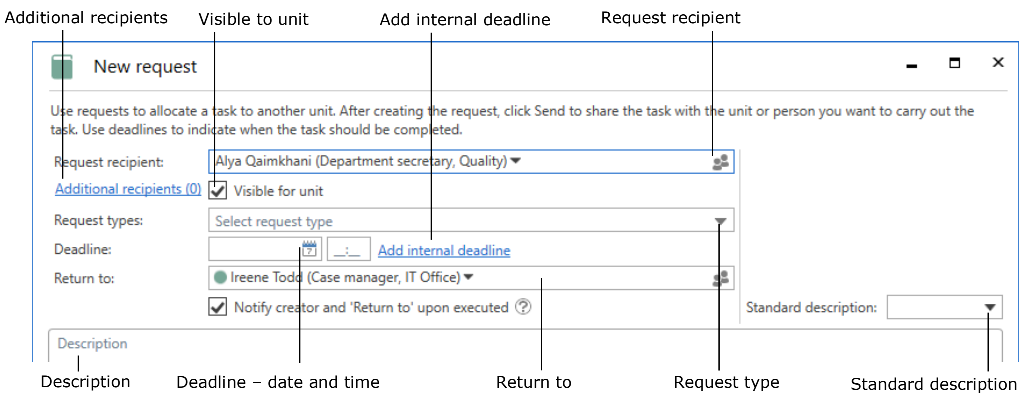


Figure 4: Fields the requester may use

Click **Save** to create the request. A log of performed actions appears in the upper right corner. The log is updated when the request is sent, edited, replied to, etc.

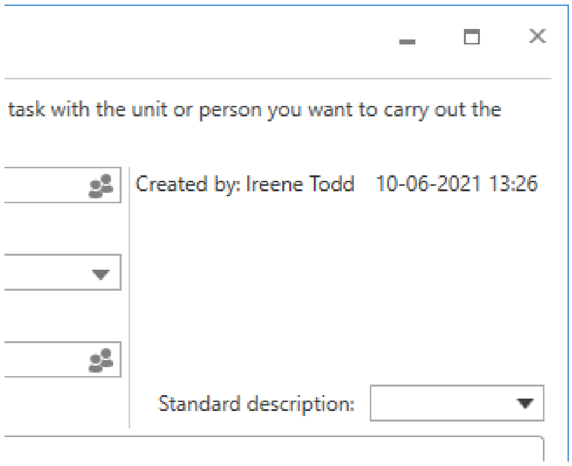


Figure 5: The request log after creation

If a request is created with incorrect information, it can be deleted by clicking **Delete**.

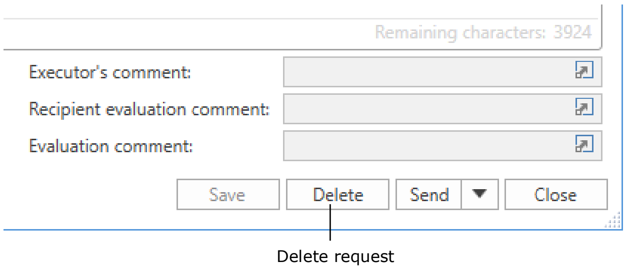


Figure 6: Delete a saved request

If the request has already been sent, it cannot be deleted, only cancelled. Cancel a request by clicking **Cancel request**. This button replaces the "Delete" button after the request has been sent.

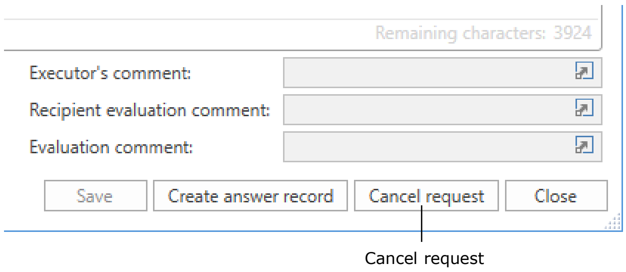


Figure 7: Cancel a sent request

Click **Send** and the recipient receives the request in their inbox in F2. Any users specified in the "Additional recipients" field receive a copy of the request.

If the request must be sent immediately, saving before clicking **Send** is not necessary. The request is automatically saved when sent.

By default, the record creator is responsible for the record to which the request is linked. If the record creator clicks the drop-down arrow on **Send**, they can allocate the responsibility of the record to the request recipient. This is done by clicking **Send and set record responsible** in the drop-down menu.

This way, the record creator allocates the responsibility for not only the request, but the entire record, to the request recipient.

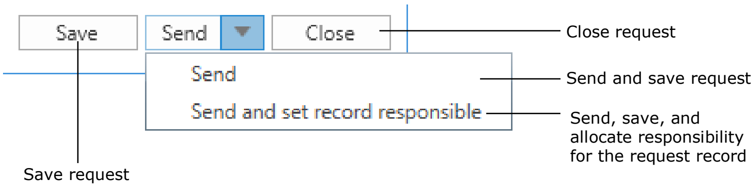


Figure 8: The request creator's options

> **Note**: The **Send and set record responsible** function becomes active when the request is saved.

When a request is created, it can be seen and accessed from the record to which it is linked. Open the request by clicking the request icon at the top of the document area. An overview of the request is shown. Click anywhere in the overview to open the full request window.

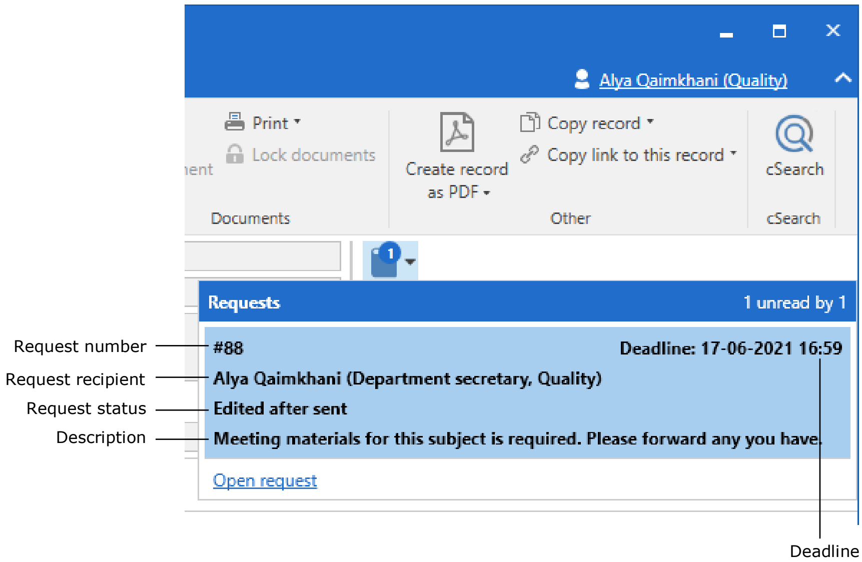
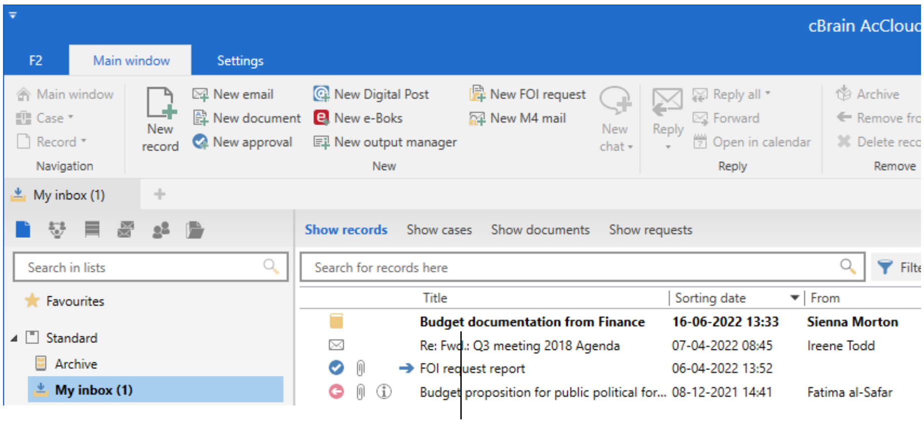


Figure 9: Click the request icon to see the request overview

The overview shows request number, deadline, request recipient(s), status, and the first part of the description for each request. Request numbers are assigned automatically and chronologically.

Receiving and accepting a request

When a request is sent, the recipient receives it in their inbox.



Received request in "My inbox"

Figure 10: A request in the recipient's inbox

Double-click on the unread record to open the request.

If a record with a request is unread, the request window automatically appears when the record is opened. If the record has already been accepted, the request is marked as read and can be accessed by clicking the request icon on the record.

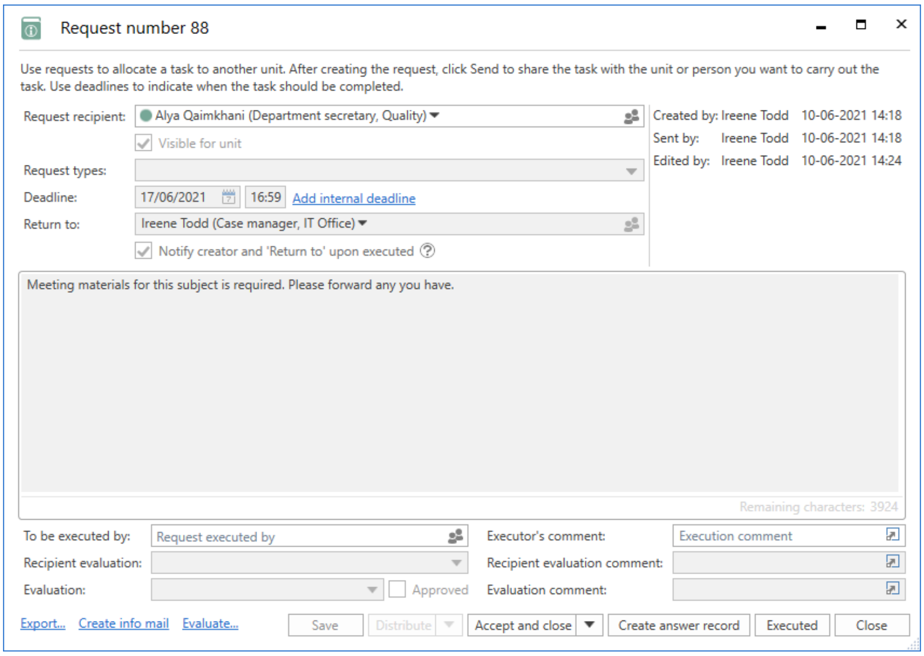


Figure 11: A received request

After receiving the request, the recipient has two options. To accept the request, click on either the **Accept and close** button or its **drop-down arrow**. The **Accept** button then appears with which the request can be accepted without closing the window.

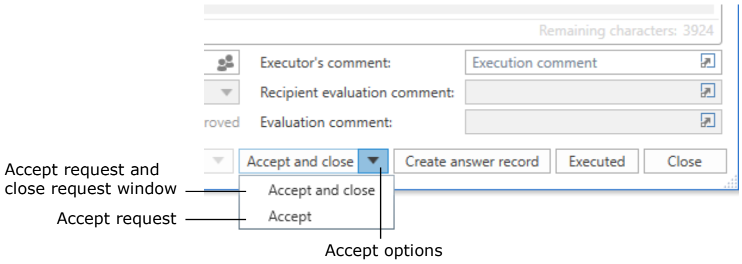


Figure 12: Options when accepting the request

If the recipient wishes to accept the request, but disagrees with one or more of the conditions, they can contact the requester, e.g. via a chat on the record to which the request is linked.

When the request has been accepted, it is noted in the log in the top right corner of the window.

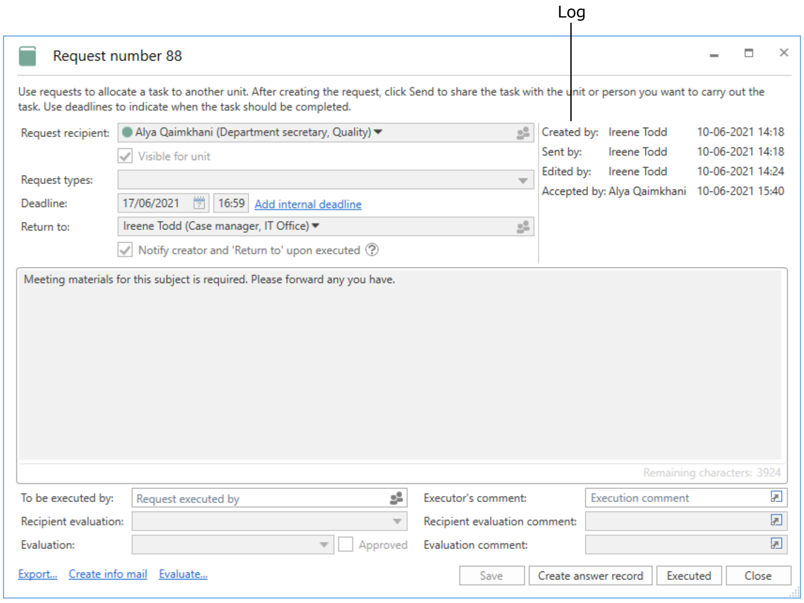


Figure 13: Accepted request

The request recipient has the option of evaluate the quality of a submitted request. This is done by clicking **Evaluate…** at the bottom of the request window. This makes it possible to add an evaluation in the "Recipient evaluation" field and a comment in the "Recipient evaluation comment" field.

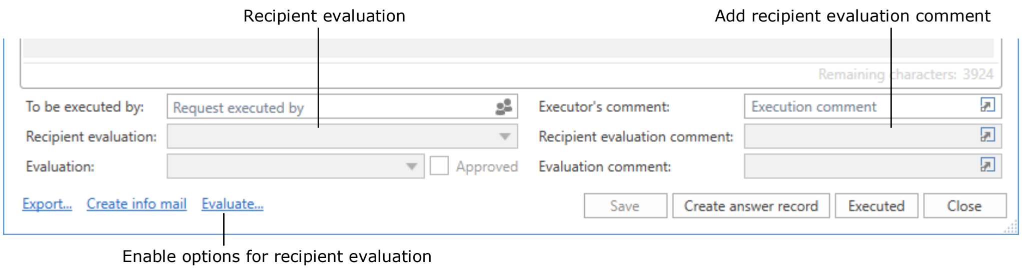


Figure 14: Request recipient evaluation options

Note: The **Evaluate...** button and "Recipient evaluation" and "Recipient evaluation comment" fields are disabled by default and must be enabled through a configuration. Configurations are made in cooperation with cBrain.

If the recipient accepts the request, but another user is to execute it, the recipient enters the executor's name in the "To be executed by" field. Click **Save** to send the request to the new executor's inbox.

If the request recipient cannot accept the request, they can choose a new request recipient. Once a new recipient has been entered, the **Distribute** button is activated. Click **Distribute** to send the request to the new recipient.

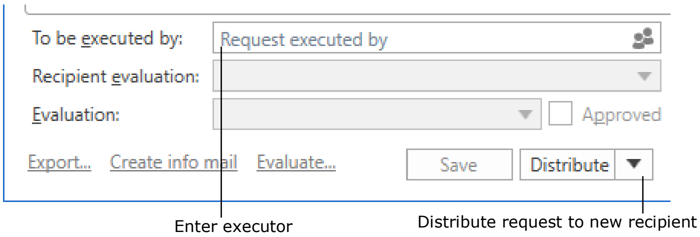


Figure 15: Additional options when receiving a request

Replying to a request

A request is replied to in one of three ways:

- Execute the request by replying to it directly in the request window.
- Reply to the request by creating and sending an answer record with **Create answer record** in the request window.

  Note that it is possible to click **Create answer record** before accepting the request as it may be practical to begin working on it even though the terms and conditions of the request are not yet finalised.
- Reply to the request by selecting an existing record and attaching it as an answer record to the request.

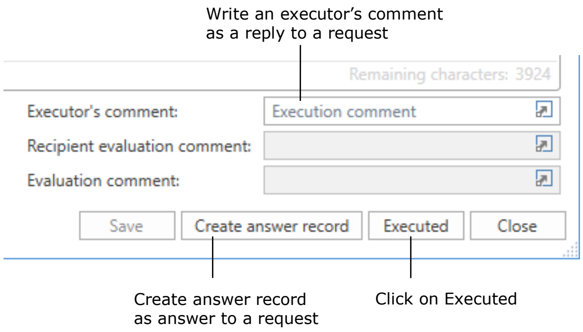


Figure 16: Reply options in the request window

Replying in the request window

Reply to the request in the request window by using the "Executor's comment" field. Click on **Executed** to reply to the request with the text entered in the "Executor's comment" field. This comment constitutes an answer to the request.

Creating an answer record

Reply to the request with an answer record by clicking **Create answer record**. The following dialogue opens.

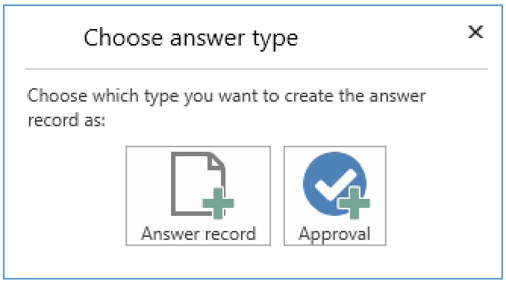


Figure 17: The answer type dialogue

It is possible to create an answer record with or without an approval attached, if the add on-module is installed. Regardless, the "New record" dialogue opens with "Re: [Request name]" in the "Title" field. If the request record is attached to a case, F2 suggests attaching the answer record to the same case.

> **Note:** The "Choose answer type" dialogue only opens if F2 Approvals is set up, and if the dialogue has been configured. F2 is configured in cooperation with cBrain.

The answer record will have the same deadline as the request. If a request has both an internal and a formal deadline, the answer record will be assigned the former.

The deadline for the record to which the request is linked is suggested as the reminder date.

An approval can be added to the answer record at this step by clicking **Add approval** at the bottom of the dialogue.

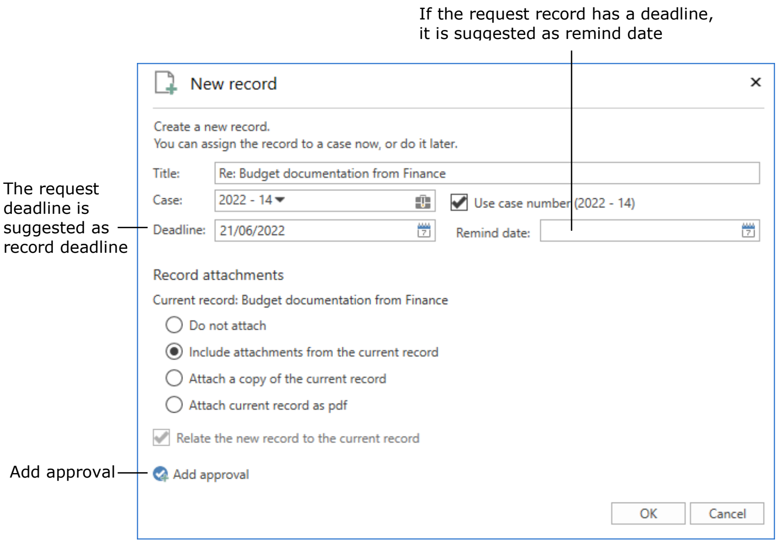


Figure 18: Creating an answer record

When choosing an approval as the answer type, the request deadline is suggested as deadline for the approval as well as for the answer record to which it is linked.

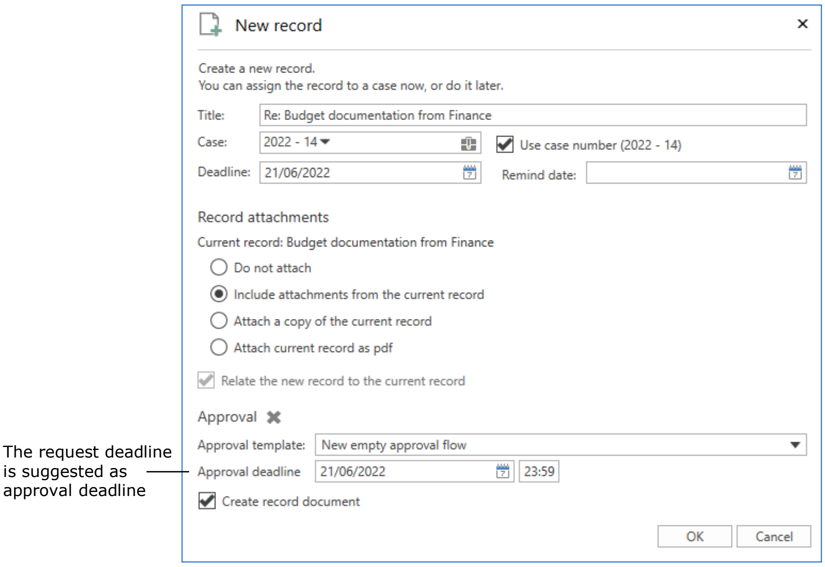


Figure 19: Creating an approval record as answer record

Note: It is possible to set the request record's deadline as the deadline for the answer record and its approval, while the request deadline can be set as the reminder date. This must be configured in cooperation with cBrain.

The option to "Include attachments from the current record" is selected by default.

Click **OK** to create the answer record.

Note: It is possible for the organisation to choose a default option regarding record attachments in the "New record" dialogue. One of the options "Include attachments from the current record", "Attach a copy of the current record", or "Attach current record as pdf" is then preselected when the dialogue opens. However, users can select another option before clicking **OK**. Configurations are made in cooperation with cBrain.

The answer record is automatically addressed to the user in the "Return to" field, who receives it in their inbox when the request recipient clicks **Send** in the ribbon of the record window.

Navigation between the answer record and the record to which the request is linked is facilitated by a request icon in the answer record's ribbon. Click the **Go to request** menu item to open the record with the request.

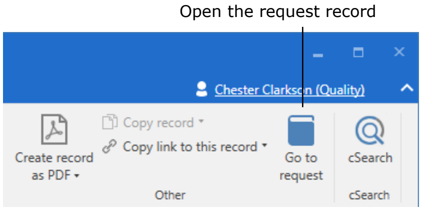


Figure 20: Open request record from answer record

In a similar way, the answer record can be accessed from the request itself. Click the record ID link displayed next to the "Answer record created" entry in the request log to access the answer record, as shown below.

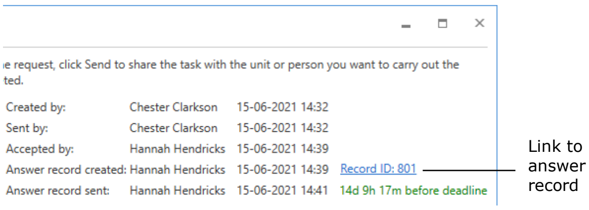


Figure 21: Link to the answer record in the request log

Once the answer record has been sent, the user listed in the "Return to" field receives both the answer record and the request record in their inbox. The request is considered executed and is no longer shown in the recipient's or executor's "F2 Requests to unit" list. For more information about the list, see *Standard request searches*.

As mentioned above, the answer record can also be an approval. This can be useful for requests involving e.g. the head of a unit.

If the answer record contains an approval, the request log can be configured to show when the answer record's approval has been approved. A line is added to the log, and the request status changes to "Executed". This configuration is performed in cooperation with cBrain.

For further information, see *F2 Approvals – User manual.*

Selecting a record as answer to a request

It is possible to reply to a request with an already existing record. Right-click the record that will serve as a reply and click **Select as answer record to a request** in the context menu.

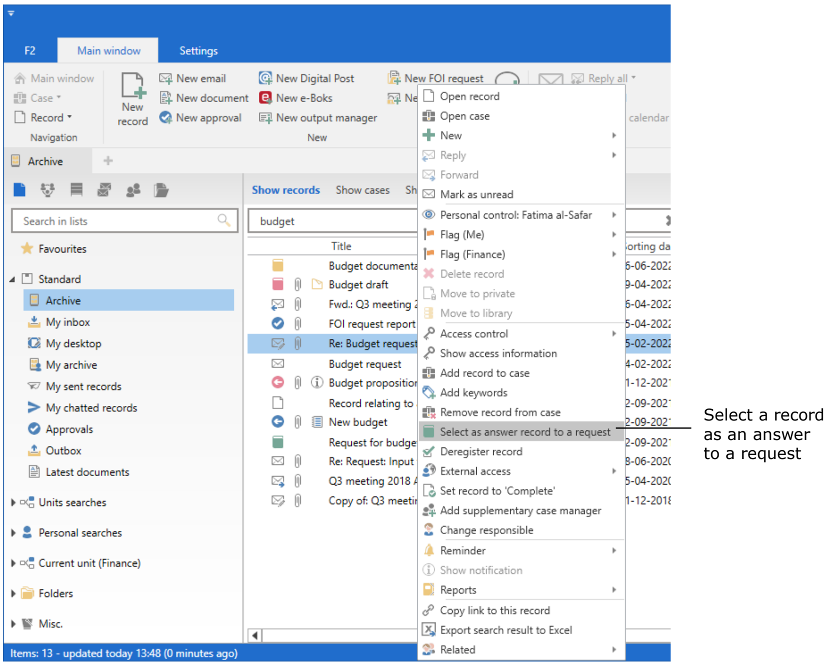


Figure 22: Selecting an existing record as an answer record

Clicking **Select as answer record to a request** opens the "Select request" dialogue displaying a list of requests on which the user is either the recipient or executor. Choose the relevant request from this list and click **Attach as answer**.

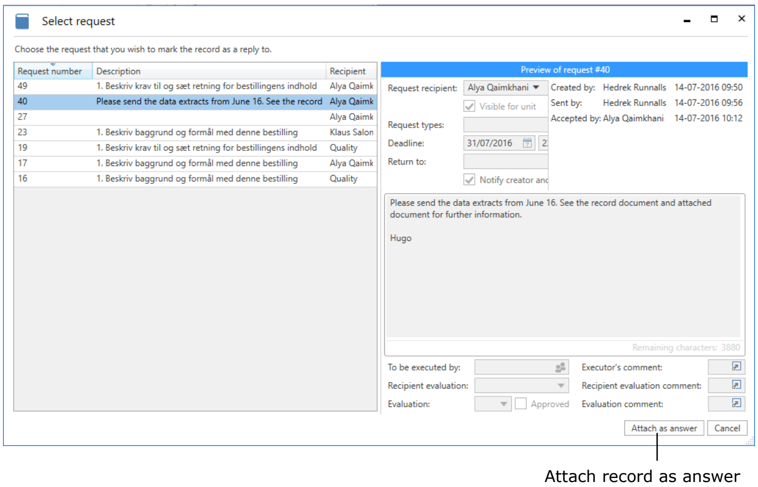


Figure 23: A record is attached as a reply to a request

Attaching a record as an answer to a request turns the record into an answer record. This is similar to creating an answer record from within the request window by clicking **Create answer record**.

However, creating a new answer record may not be the best course of action if an existing record already contains the requested information.

To attach a record as an answer to a request, a number of criteria must be met:

- The user attaching the record must have full write access to it.
- The recipient must have read access to both the request and the record to which the request is linked.
- The record must not already be attached as an answer to another request.
- The record must be of a type (regular record or approval) that F2 Request's setup allows as an answer record.

When the record has been selected as an answer record, it appears in the unit inbox of the "Return to" user. Back in the request window, click **Executed**. The request is then considered executed and can be processed by the "Return to" user.

> **Note**: When a record is attached to a request, the request log displays its original creation date and not the date of the attachment.

Finalising a request

The executed request is sent to the "Return to" user's inbox.

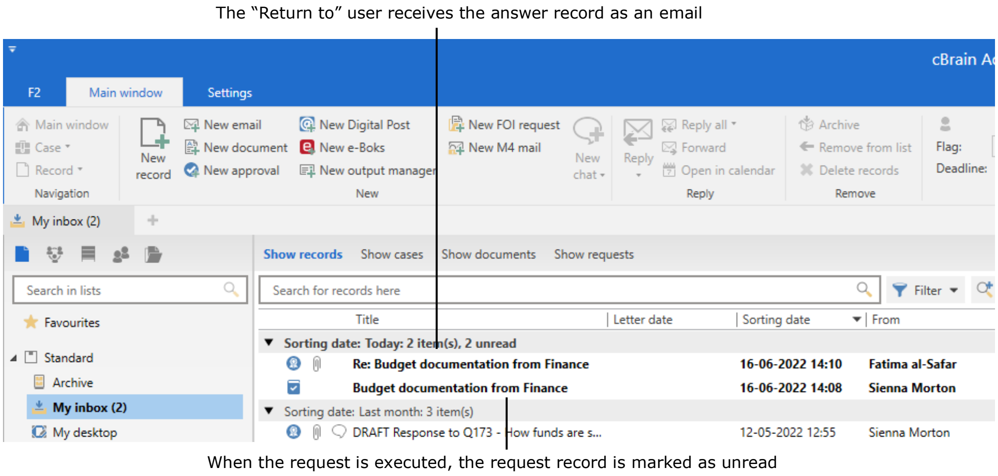


Figure 24: Executed request and answer record in "Return to" user's inbox

The request is finalised by the "Return to" user who may add an evaluation, an evaluation comment, an approval, or a combination of these.

Click the **drop-down menu** in the "Evaluation" field to evaluate the request. In the "Evaluation comment" field, a remark may be added. Tick the "Approved" box to approve the request reply.

> **Note**: The **Evaluate…** button and "Evaluation" and "Evaluation comment" fields are disabled by default and must be enabled through a configuration. Configurations are made in cooperation with cBrain.

If the reply to the request is satisfactory, click **Finalise request**.

> **Note**: The "Before deadline" log entry, which is shown when the request has been executed, is based on the formal deadline of the request and not an internal deadline.

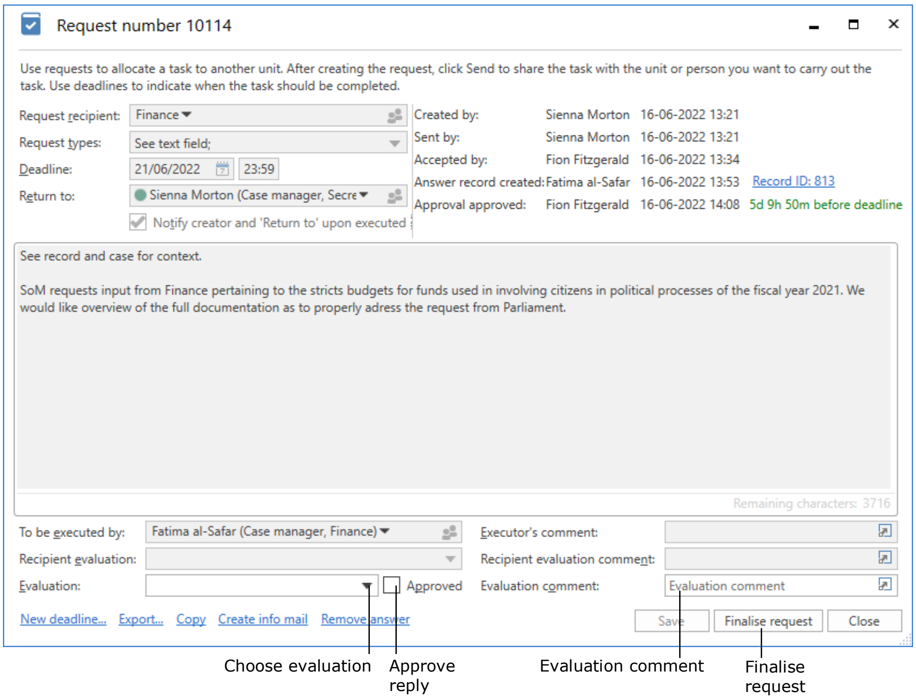


Figure 25: Executed request to be evaluated and finalised

Once the request is finalised, it is registered in the log.

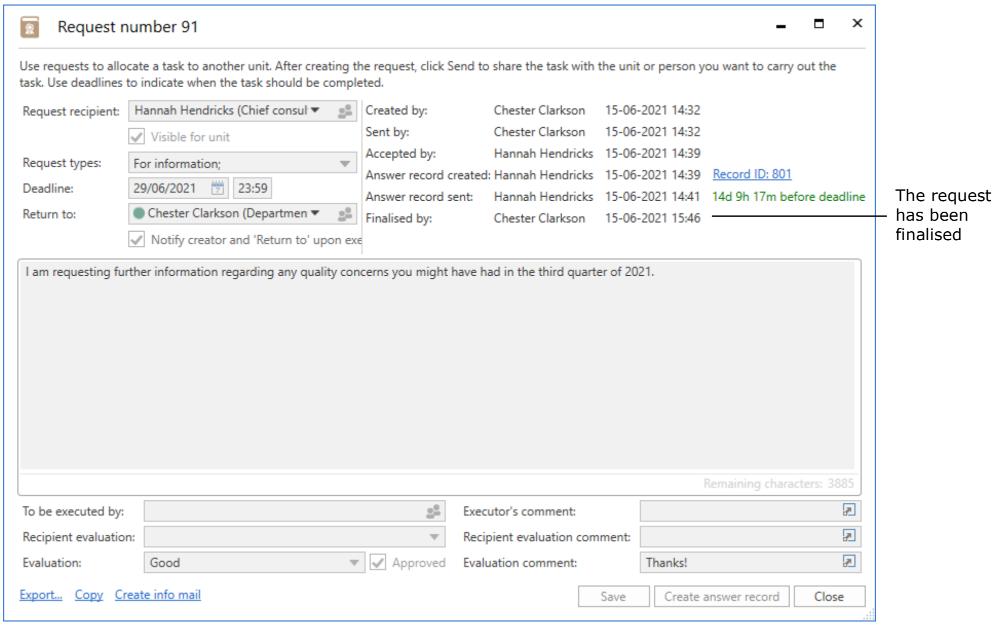


Figure 26: The finalised request

The request's approval status, evaluation, and evaluation comment are then visible to the request recipient.

> **Note**: The requester can finalise the request at any time. This changes the request icon to finalised .

> **Note**: F2 can be configured to either allow all users to finalise requests or only users in the requester's unit.

When the request has been finalised, it disappears from the "F2 Requests from unit" list.

Finalised requests can still be viewed and accessed in F2's main window. For further information about the default lists and searching for finalised requests, see *Request overview in F2 Desktop*.

Extra functions

In addition to the above, F2 Request offers a number of extra functions. These practical tools are described in this section.

At the bottom left of the request window, a number of extra functions are available.

The available functions depend on the status of the request. The table below lists each extra function.

Function	**Description**
"Finalise now…"	Finalise the request immediately, even if it has not been processed by the executor. This is only available to the requester and users in their unit.
"New deadline…"	Change the deadline for a request after it has been accepted by the recipient. This can only be done by the requester and users in their unit. If the requester changes the deadline, the recipient and the executor will receive a notification in their F2 inbox.
"New recipient…"	Add a new recipient. If the previous recipient has already accepted the request, the acceptance is cancelled.
"Export…"	Export and save the request in XML format on the PC.
"Copy"	Create a copy of the request on the same record, but with a new request number.
"Create info mail"	Create an email with the request attached to inform a third party of the request. The third party must be registered in the participant register.

Function	Description
“Remove answer…”	Remove the answer record’s association with the request and the creation of the answer record from the request log. This function appears when an answer record is created or attached to the request.

Request overview in F2 Desktop

Working daily with F2 Desktop, the amount of requests may quickly accumulate, so a list of active requests is a practical tool that comes with any F2 installation. F2 Request offers tools for adjusting the lists through search and display options.

Besides internal requests, the lists also contain group and external requests if these add-on modules are installed.

Standard request searches

F2 comes with two standard request searches:

- "F2 Requests to unit"
- "F2 Requests from unit"

These standard searches are located in the "Units searches" list node at the left of the F2 main window. In the example below, they are displayed in the "Doc Organisation" node.

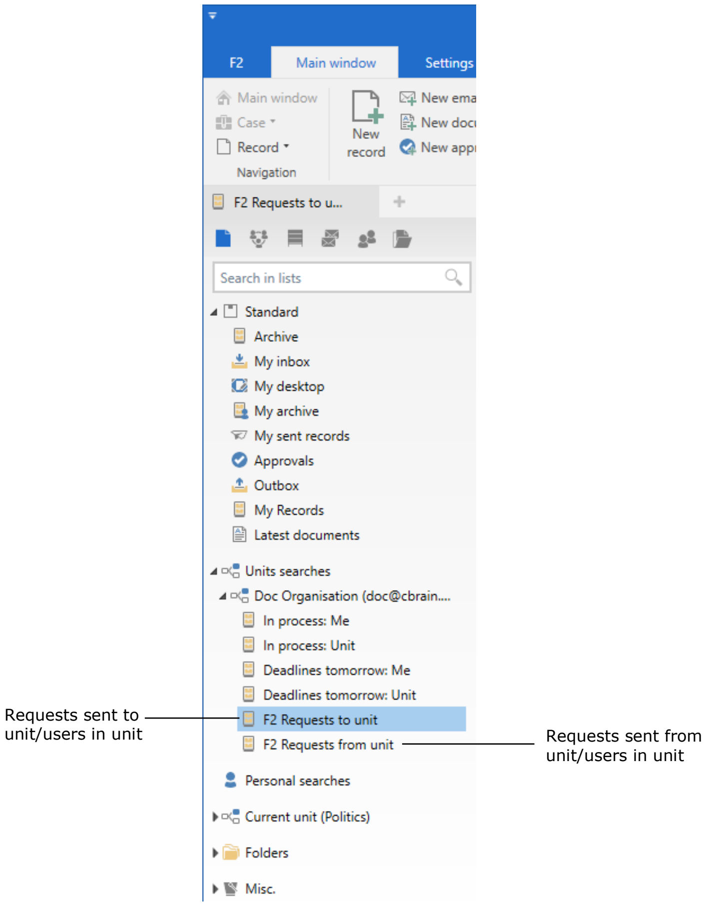


Figure 27: Request lists

Request recipients will see any received requests in the "F2 Requests to unit" list. This list shows records with requests that are sent to either the current user, their unit, or another user with a job role in the current user's unit if the request was marked as "Visible for unit" by the request creator. The "Visible for unit" checkbox is further described in *Creating a request*. Records with requests that have been cancelled, evaluated, executed, or have been associated with an answer record are not shown in this list.

The "F2 Requests from unit" list contains sent requests from the current user's unit to which the user has access. This list shows records with requests sent from either the current user, their unit, or another user with a job role in the current user's unit. Records with requests that have been cancelled or evaluated are not shown in this list.

Requests are also shown in the request sender's "My sent records" list and in the request recipient's "My inbox" list.

Searching for requests

All requests regardless of status can be found in the "Archive" list. This allows the user to create an overview of all requests to which they have at least read access.

> **Note**: If a user is not the request recipient or part of the request recipient's unit, they cannot necessarily access the request even if they have access to the record on which the request was created.

Only advanced searches should be made in the "Archive". To perform an advanced search pertaining to requests, click the **Advanced search** menu item in the main window ribbon and then select the "Request" search group.

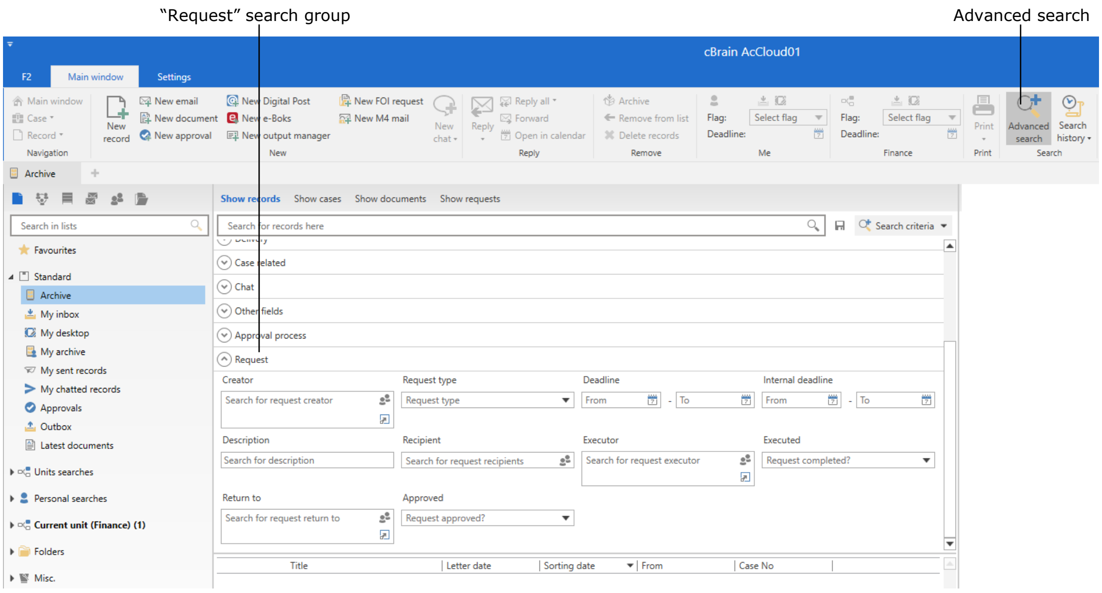


Figure 28: Advanced search for requests in the "Archive"

As with the standard searches of the list view, the search will show requests both to and from the user and their unit.

For further information on performing searches in F2, see *F2 Desktop – Searches*.

List display options

The result list can be adjusted to provide a better overview of requests in "My inbox" as well as in searches for requests specifically. Adjust the result list by clicking the **Show requests** display option, and by adding relevant columns.

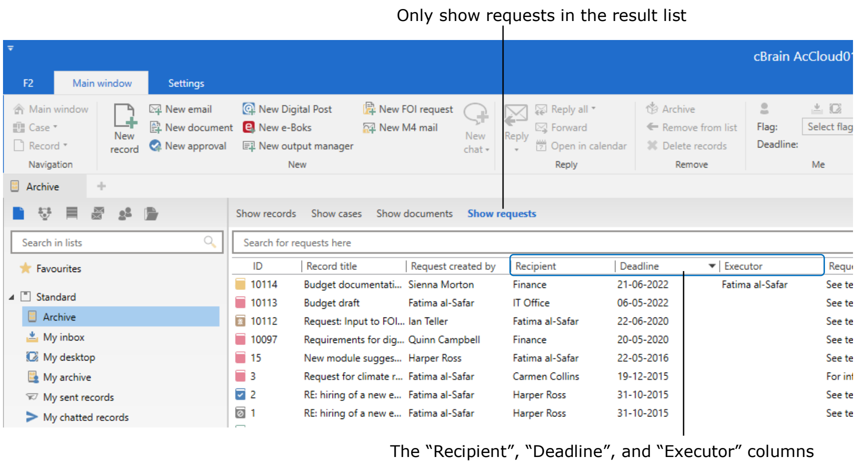


Figure 29: Columns in the request list view

Certain columns are helpful when it comes to keeping track of requests, e.g. "Recipient", "Deadline", and "Executor".

Hover the cursor over a request icon to see a tooltip with information on status, deadline, requester, recipient, and a description of the request.

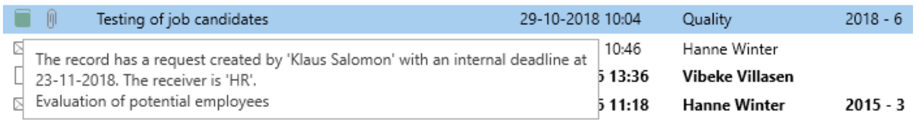


Figure 30: Tooltip for a request

Request icons

Depending on the deadline and status of the request, the request icon changes as shown in the table below.

Icon	Description
	Create new request.
	Request without deadline.

Icon	Description
	Request with more than seven days until deadline.
	Request with less than seven days until deadline.
	Request with an exceeded deadline.
	Edited* request without deadline.
	Edited* request with more than seven days until deadline.
	Edited* request with less than seven days until deadline.
	Edited* request with exceeded deadline.
	Executed request.
	Cancelled request.
	Finalised request.

*=I.e. changes to deadline, request type, or description after the request has been sent.

F2 cPort LIS Request (add-on module)

F2 cPort is a data extraction tool intended for users with the “Access to cPort” privilege. With cPort a user can extract data and create reports from information accessible throughout F2.

F2 cPort LIS Request is an add-on module that builds on the F2 cPort module. cPort LIS Request is developed to extract request-related data which can be used for generating reports.

cPort LIS Request comes with three data groups for generating reports related to:

- Internal and group requests
- Outgoing external requests
- Incoming external requests.

Which data are available in cPort LIS Request depend on the authority’s configuration of F2 Request and how the request types are used.

Configurations for F2 Request

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

- Automatically tick the checkbox "Notify creator and 'Return to' upon executed" when creating a new request.
- Enable the **Evaluate…** button and its associated evaluation fields. It is also possible to choose whether the fields can be filled in by all users or only the request recipient and the "Return to" user.
- Determine whether answer records can be created as regular records, approval records, or both. If both types are allowed, the user selects the appropriate type in the "Choose answer type" dialogue.
- Use the request record's deadline rather than the request's deadline as record and approval deadline for the answer record, and use the request deadline rather than the request record's deadline as reminder date.
- Show internal approvals of answer records in the request log after the approval is finalised. A line is added to the request, and the request status is updated to "Executed".
- Allow a request to be finalised by all users or only by those in the request creator's unit.
- Choose the default option in the "New record" dialogue when attaching a request record to an answer record ("Include attachments from the current record", "Attach a copy of the current record", or "Attach current record as pdf").

List of Figures