cBRAIN

F2

Approvals

Version 8

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Reading guide

This manual is written for users of F2 Approvals.

The manual contains a short introduction to F2 Approvals 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 Approvals

The F2 Approvals add-on module provides a fast and easy way of quality assuring work using an efficient and effective approval flow. This module aims to simplify the process of approving material.

F2 Approvals also helps an organisation ensure that its formal approval processes are kept.

Approvals can be used when one or more people need to have a piece of work formally approved. This may be a meeting agenda, internal regulations or an answer to either a citizen or an authority.

By default, all F2 users can start an approval and define which user(s) should approve the attached material, which users should be oriented about the approval, and set a deadline for the approval. If needed, an approval template can be configured so that all approvals follow a fixed flow.

This manual aims to give the reader an introduction to F2 Approvals and its functions.

Working with approvals

An approval contains two main roles:

- *The responsible*: The person who initiates the approval.

- *The approver:* One or more persons who are to approve the submitted material.

Each approver is linked to a step in the approval process and can carry out the following approval actions:

- Approve

- Return, including conditional approval.

It is possible to add comments, and the approver can manage the approval process by either returning or conditionally approving. If the approver on a given step decides to return the approval, they can suggest on which step to resume the process. This allows the approver to take control of the approval process.

All approvals consist of a number of steps. The steps included in an approval are determined by the requirements of each approval. An approval can be saved as an approval template.

One or more copy recipients can be added to an approval step. For more information about copy recipients, see the *Adding a copy recipient* section.

Approvals can be processed in F2 Desktop, F2 Manager (add-on module) and in F2 Touch (add-on module). For more information, see *F2 Manager – User Manual* and *F2 Touch – User Manual*. This manual is concerned with approvals in F2 Desktop.

Approval overview in F2 Desktop

In the main window, an approval record can be identified by its circular approval icon, whose colour and content change depending on status. For a detailed description of approval icons and their meaning, see the section *Overview of approval icons*.

An overview of e.g. returned or completed approvals can be created using searches for approval record metadata.

Active approvals are always displayed in the "Approvals" list view in the main window.

View active approvals

F2 is installed with the "Approvals" standard search in the main window.

Click on **Approvals** to display the current approvals that the user is authorised to view. An example of what it could look like is shown below.
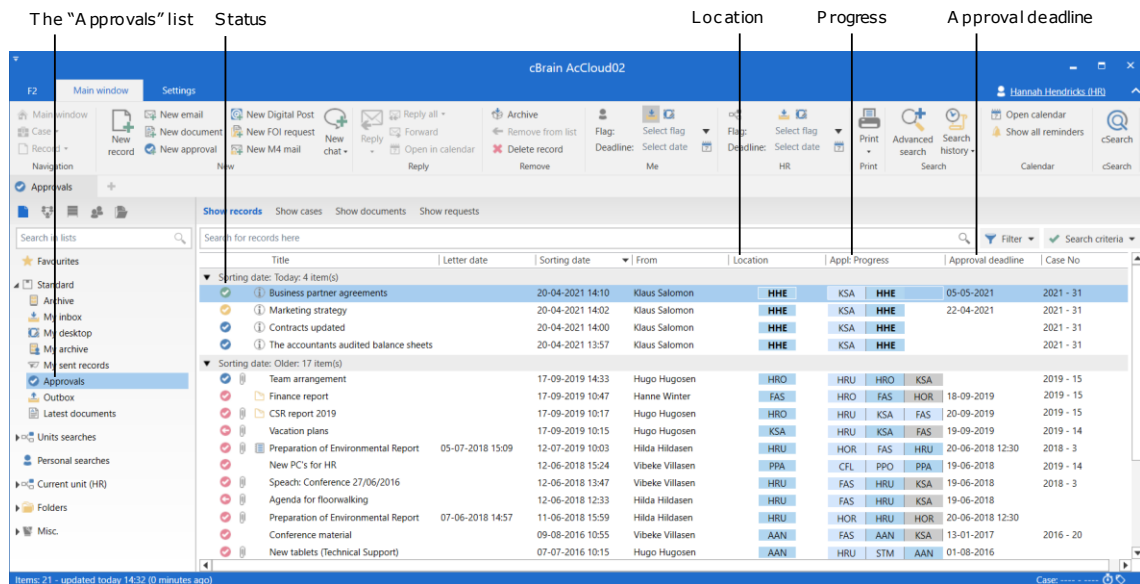
Figure 1: Overview of active approvals in the main window

There are several columns in F2 which can be used when displaying the approvals in the result list:

- **"Icon" column**: Displays the approval's status. Each approval icon is described in the section *Overview of approval icons*.
- "**Approval deadline" column**: Shows approval deadlines, if applicable.
- "**Location" column**: Shows the current location of the approval with the approver's initials.

- "**Appl. Progress" column**: Provides a graphical view of the approval's current location (blue), its former location (light blue) and where it is going (grey). Furthermore, on each approval step the approver's initials are written. The initials of the user who initiated the approval are written in bold.

Note: If there are two approvers or more on the same approval step, instead of initials the number of approvers on that step is shown.

Note: The user initials displayed in the list of approvals are maintained in the participant register and obtained from there.

By default, the initials field in the participant register is updated/synchronised via AD (Active Directory). If this synchronisation does not take place or if there are no initials in AD, three asterisks (***) are displayed in the field.

Creating specific searches for approvals

In addition to the pre-defined search for active approvals called "Approvals", it is possible to generate personalised searches based on the metadata of approval processes created in F2. This is done in the following way:

- Click on **Archive**.
- Click on **Advanced search** in the main window ribbon and open the search group "Approval process".
- The search fields related to approvals are displayed. Fill in one or more of the fields depending on the wanted search criteria.
- Save the search by clicking on **Save search**. The search is then added to the "Personal searches" lists.
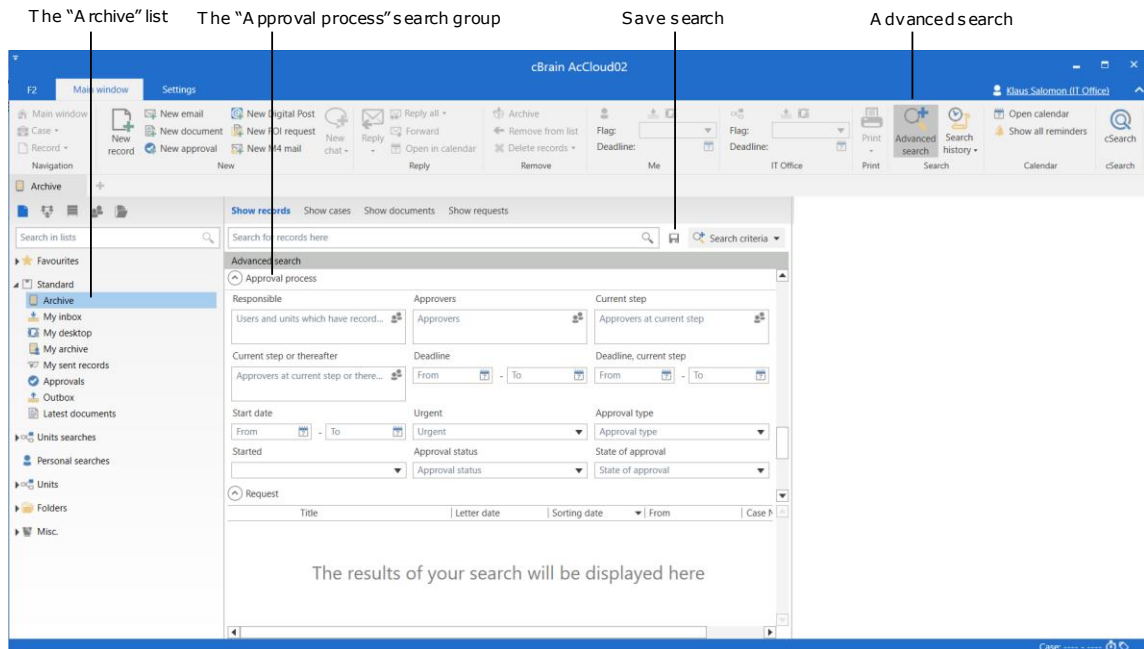
Figure 2: The "Approval process" search group

Below is a detailed description of the search options in the "Approval process" search group.

Search field	Purpose
"Responsible"	Search for approvals in which the user or users specified in the search field is/are responsible for the approval. Type "me" to search for approval processes initiated by the user themself.
"Approvers"	Search for approvals in which the user or users specified in the search field is/are the approver(s). When searching for a specific user, all approvals in which the user is or has been the approver will be shown.
"Current step"	Search for approvals awaiting approval from the user(s) specified in the search field.
"Current step or thereafter"	Search for approvals awaiting the approval of the specified user(s). Approvals in which a specified user has already processed their step are not included in the search results.
"Deadline"	Search for approvals with a deadline corresponding to the specified date.

Search field	Purpose
	It is possible to search for a specific date or time interval. Entering "-[number]" and/or "+[number]" in the deadline fields will always show the time period from the current date minus/plus the specified number in days. This makes it possible to search for e.g. a deadline one week from the current date by entering "+7". This search can be used for creating a dynamic list of approval deadlines since the search criterion changes with the date.
"Deadline, current step"	Search for approvals with a deadline corresponding to the specified date. The "Deadline, current step" field searches for partial deadlines that can be set for the current step. This lets the user search for approvals in which the current step has a separate deadline.
"Start date"	Search for approvals that have started within a certain interval.
"Urgent"	Search for approvals which are either marked as urgent or not. **Figure 3: Urgent**
"Approval type"	Search for approvals based on the type. **Figure 4: Approval type**
"Started"	Search for approvals which have or have not started. **Figure 5: Started**

Search field	Purpose
"Approval status"	Search for approvals which are in process, completed or cancelled. **Figure 6: Approval status**
"State of approval"	Search for approvals which are returned, approved or conditionally approved. **Figure 7: State of approval** Use the field "State of approval" to search for the latest action made related to the approval. The action related to the approval constitutes the state of approval. When an approval is created in F2, its state is the "Approved" state – even before the approval process is started. From here on the state of approval changes if it is returned, and again if it is resumed. The approval gets the state "Conditionally approved" if it is returned and then resumed with the next approver in the approval process. The approval gets the state "Returned" if it is returned and subsequently resumed with "Me" or "All". The approval gets the state "Approved" when it is resumed, and when it is finally approved.

Depending on which search fields have been filled in, the user can perform specific approval searches. For example, it is possible to search for:

- My active approvals.
- My completed approvals.
- All approvals for which I am/have been responsible.
- Approval type.

- Approval status (returned, approved or conditionally approved).
- Approval deadline.

For more information on performing and saving searches in F2, see *F2 Desktop – Searches*.

Accessing approvals in the preview

All active approvals to which the user has access can be displayed by clicking on **Approvals** in the list view in the main window.

Clicking on an approval record in the result list opens a preview of the record to the right. This requires the preview feature to be activated, which is done from the "Settings" tab.

Click on **Approval** in the preview to see an overview of the approval, along with a log of the approval process.
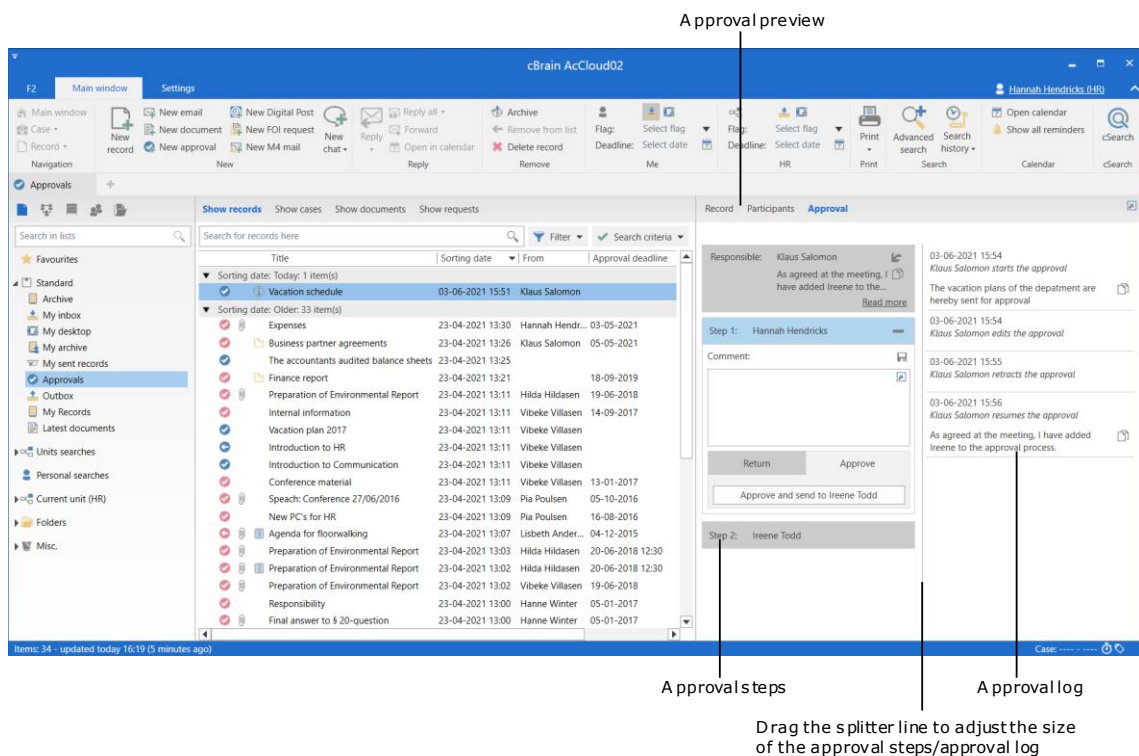
Figure 8: Preview of an approval in the main window

The user can perform approval actions using the preview as long as the approval is at their step. It is not necessary to open the approval to comment, return or approve. This can all be done from the preview in the main window.

If the approval contains unsaved changes, and the user selects a different record in the list, F2 will ask the user if the approval record's changes should be saved. It is not possible to undo a preview change. Therefore, it is important to either save or discard changes before the changing previews.
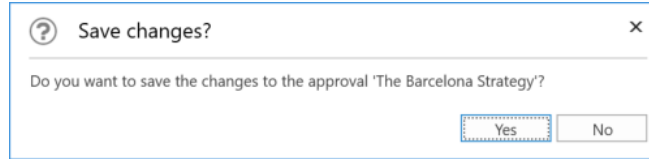
Figure 9: The "Save changes?" dialogue for changes made using the preview

Overview of approval icons

An approval on a record is displayed with an icon providing information about its status. The status icon appears in a list, e.g. "My inbox", in the main window's result list.

Below is a complete overview of the approval icons in F2 Approvals as well as their meaning.

Icon	Description
✓	Approval without deadline.
✓	Active approval with a deadline of more than seven days.
✓	Active approval with a deadline of less than seven days.
✓	Active approval with an exceeded deadline.
←	Returned approval without deadline.
←	Returned approval with a deadline of more than seven days.
←	Returned approval with a deadline of less than seven days.
←	Returned approval with an exceeded deadline.
⊘	Cancelled approval.
🏅	Finally approved approval.

Creating a new approval

An approval is a structured process initiated by a user. The user who creates and starts the approval process is specified as the person responsible for the approval. The foundation of the approval is the approval record, which is automatically created when a new approval is created.

There are three ways of creating an approval:

- Creating an approval record in F2's main or case window.
- Creating a new record and then attaching an approval process.
- Adding an approval to an existing record in the record window.

In all cases, the record becomes an approval record and an approval document is added to the record document.

Creating an approval via the main window

To create an approval in the main or case window, click on **New approval** in the ribbon.

Create new approval
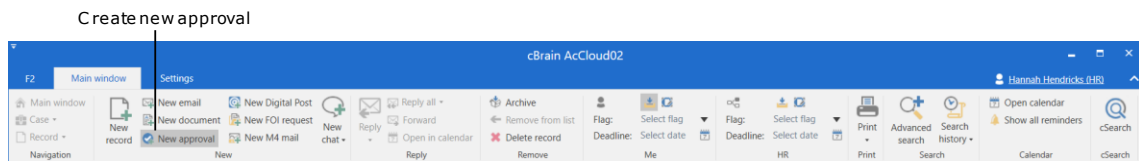
Figure 10: The "New approval" menu item in the main window

Click on **New approval** to open the "New approval" dialogue.

Approval template

Figure 11: Create new approval

Fill in the following metadata in the dialogue:

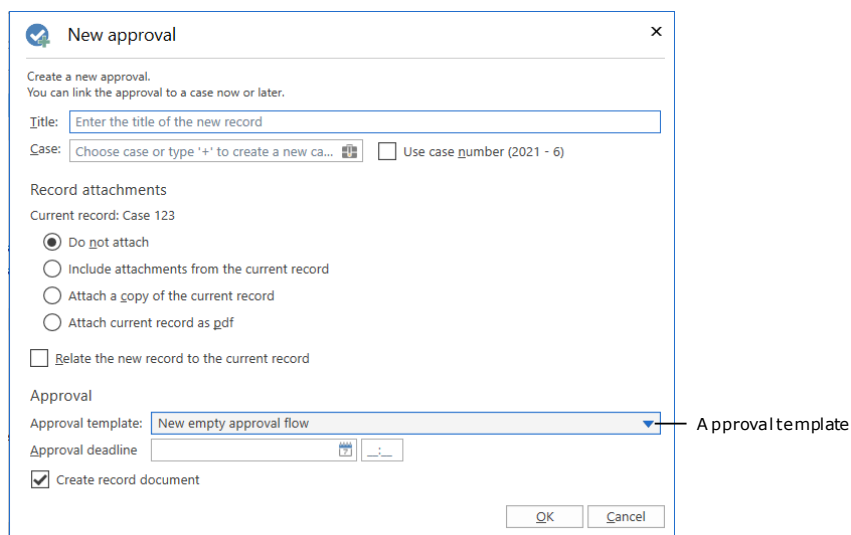| Function	Description
"Title"	Specify the title of the record on which the approval is created.
"Case"	Choose whether the approval record should be attached to a new or an existing case.
"Record attachments"	Select how to handle attachments for the record selected in the main window.
"Relate the new record to the current record"	Tick this field to create the new approval record as an answer record to the record selected in the main window.
"Approval template"	Choose between an approval template (pre-defined) or a "New empty approval flow". For more information regarding approval templates, see the section *Creating an approval template*. **Note**: When configuring F2 it is possible to give users the option to select "New empty approval flow". Read more about this in the section *Configurations for F2 Approvals*.
"Approval deadline"	If applicable, set a deadline for the approval. If an answer record to a request is created as an approval, the request's internal deadline will be suggested as the approval and record deadline.
"Create record document"	If this box is unticked, the approval will be created without a record document. **Note**: An approval without an approval document cannot be sent as an email. An approval document must be created before it is possible to send the approval. Read more about this in the section *The record document.* When configuring F2 the organisation can choose which options are available to the user when creating approvals without approval documents. See the section *Configurations for F2 Approvals* for more information.

Click **OK** to finish.

If a specific approval template has been selected, the record opens with the selected approval flow. The approval flow can be initiated when the record is ready to be sent and any eventual attachments have been enclosed to the record.

If, on the other hand, "New empty approval flow" has been selected, the dialogue "New approval of [record title]" opens. The approval flow with the number of steps and approvers is set up in the dialogue. The dialogue is described in detail in the *Setting up an approval* section.

Creating a new approval in the "New record" dialogue

A new approval can be created at the same time as a new record in the "New record" dialogue.
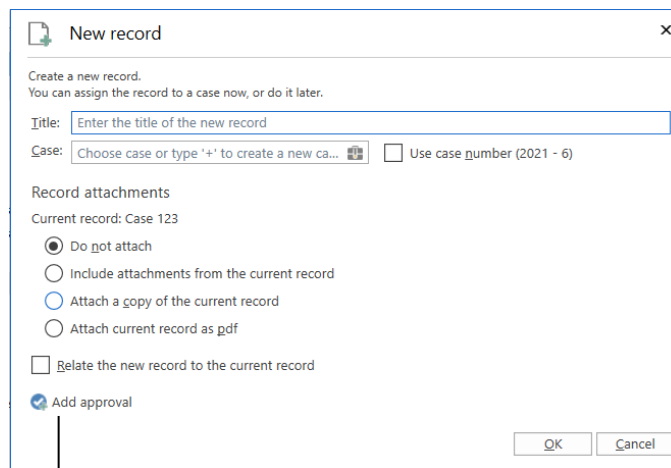
Add an approval to the new record

Figure 12: The "New record" dialogue

Click on **Add approval** to add an approval and display the "Approval template" and "Approval deadline" fields.

Cancel approval creation
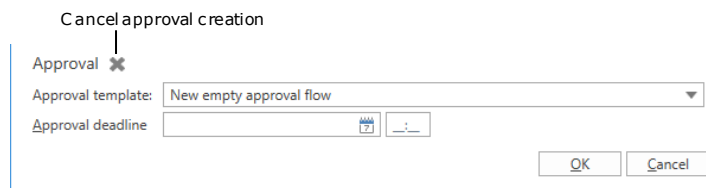
Figure 13: Create approval while creating a new record

Fill out the dialogue in the same manner as the "New approval" dialogue (described in *Creating an approval via the main window*). However, an approval record cannot be created without a record document via the "New record" dialogue.

Click on the ✖ next to "Approval" as shown above to cancel the creation of an approval on the new record.

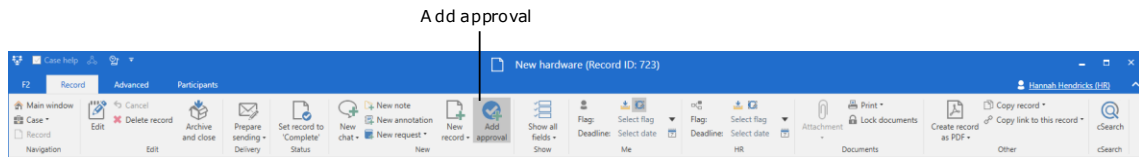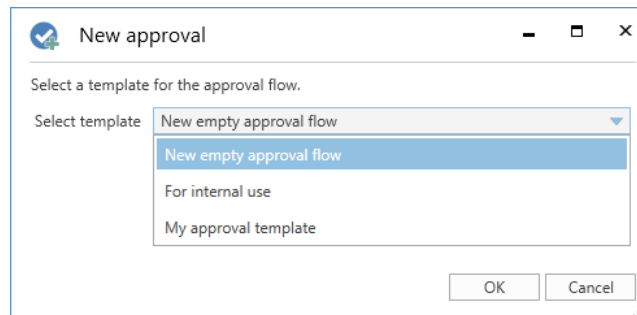# Creating a new approval on a record

To create an approval on an existing record, click on **Add Approval** in the record's ribbon.

Figure 14: The "Add Approval" menu item in the record window ribbon

The dialogue below opens.

Figure 15: Select an approval flow template

Click on the **down arrow** in the "New empty approval flow" field. In the drop-down menu that opens, click on an **approval template** (i.e. an already created approval flow) or **New empty approval flow.** Click **OK** to finish.

When configuring F2 it is possible to enable or disable the "New empty approval flow" option.
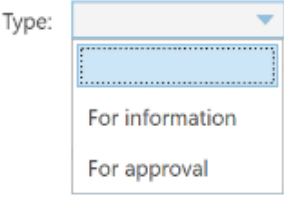
Another configuration option is whether it is possible to create an approval on an existing record. If this is disabled, approval flows may only be created in either the main window or the case window. For more information, see the section *Configurations for F2 Approvals.*

Setting up an approval flow

Whether an approval is created in F2's main window or on an existing record, the dialogue for creating a new approval is the one shown below. In this dialogue the approval flow and its number of steps and approvers are chosen.

Figure 16: Create approval flow

The following information is specified when creating a new approval:

Function	Description
"Deadline"	Specify the deadline for the approval's final approval. An exact time of day can be entered.
"Urgent"	Tick this box to indicate that the approval is urgent. **Note**: It is possible to create searches based on this field. Read more about this in section *Creating specific searches for approvals*.
"Type"	Determine the approval type. Approval types are defined by a user with the "Value list administrator" privilege and vary between organisations. **Figure 17: Example of approval types**
"Replace approval document"	Replace the approval document with another approval document.

Function	Description
	Note: An approval document can contain a description of, or comments about, the approval flow. Read more about this in the *Approval document* section.
"Add step"	Add new approval steps to the approval flow. For each approval step it is possible to add metadata described below. It is possible to add steps before and after an existing approval step. An unlimited number of steps can be added to an approval flow. Delete an approval step by clicking on .
"Approvers"	Add one or more approvers in the field. All approval steps require an approver (an internal participant from the participant register). It is possible to add one or more approvers in the field. **Note**: F2 can be configured to allow more than one approver per step. For more information, see *Configurations for F2 Approvals.* If a unit is selected as approver, the approval is placed in its shared inbox when it reaches the relevant step. This means all employees of the unit can view the approval and approve on behalf of the unit.
"Copy to"	Inform users who are not part of the approval flow about an approval step. One or more users, units and/or distribution lists can be specified in this field. **Note:** The copy recipient is not an approver and can only comment on the approval until the approver on this step has approved. For more information, see the section *Adding a copy recipient.*
"Deadline"	Set a deadline for each approver of the approval step.
"Notify approvers on this step, when changes are made"	Choose how to notify the approvers on this step when the approval is returned or when changes are made in the course of the approval flow. Changes may occur during the beginning of the process, return, withdrawal, approval, and final approval. The following options are available:

Function	Description
	• "No": The approver receives no notification.
	• "Yes, when returning": The approver receives a notification when an approval is returned after the approval has reached their step.
	• "Yes, always": The approver receives a notification of any changes in the approval process after the approval has reached their step.
"Limited visibility"	Tick this field to hide the approval from this step's approvers and any copy recipients, until the approval reaches this step.
"Give approvers on this step access to the record case"	Tick this field to give the approver write permission to the record's case. The permission is automatically revoked when the record is finally approved. Read more about this in the section *Give approvers write access to the record's case*.
"Save as template"	Save the current approval flow as a template so its setup can be reused. Read more about approval templates in the section *Creating an approval template*.
"Save"	Create and save the approval flow with the filled-in fields.
"Cancel"	Cancel the creation of the approval flow.

> **Note**: An approval cannot be created if it contains an approval step without an approver.

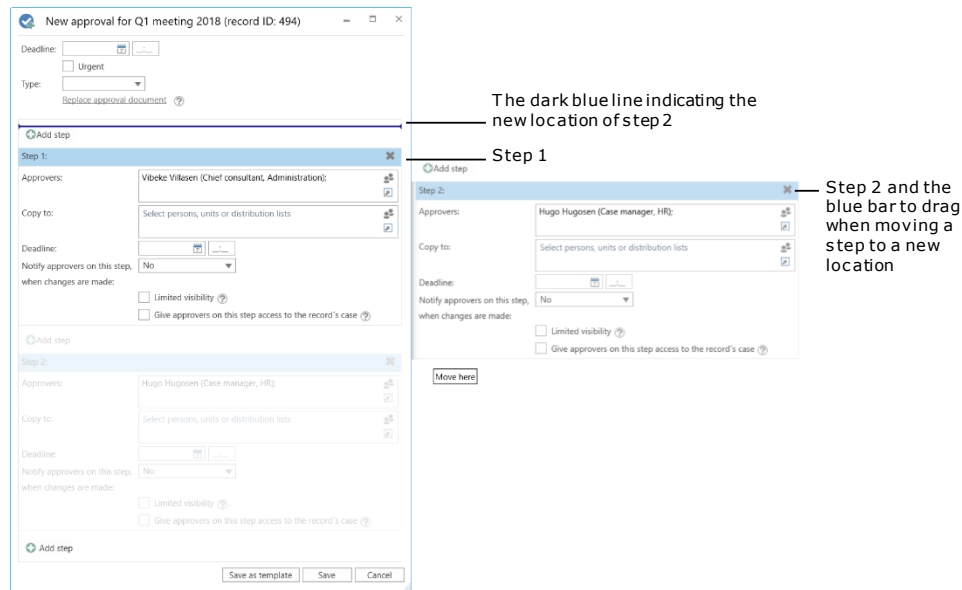## Adding and moving approval steps

Before starting an approval, it is possible to add approval steps both before and after an existing step. If necessary, the sequence of approval steps can also be rearranged.

The ⊕Add step function is found between each approval step. Click on **Add step** between two existing steps to add a new one between them. It is possible to add steps before, after and between existing approval steps.

> **Note**: Once the approval flow has started, it is not possible to add any additional approval steps.

The sequence of approvers can be changed by moving approval steps up or down. Click and hold the blue bar indicating the step. Drag the approval step to the

desired location. A dark blue line shows to where the approval step will be moved, as illustrated below.

The dark blue line indicating the new location of step 2

Step 1

Step 2 and the blue bar to drag when moving a step to a new location

Figure 18: Move a step to a new location in the approval flow

Drop the bar to insert the approval step with its approver and metadata. The sequence of approvers is now changed and the step numbers automatically change. This functionality simplifies setting up and editing approval flows.

Click on **Save** to save the changes.

Adding a copy recipient

If a copy recipient is added to an approval step, they will receive the approval in their inbox once the approval flow reaches this step. As shown in the example below, copy recipient Ann Sekner receives the approval in her inbox when approver Hugo Hugosen receives the approval.

A copy recipient can neither approve nor return an approval. A copy recipient can add a comment to the approval and call the responsible user's attention to it as well as indicate that they have seen the approval.

The copy recipient's processing period is limited to the processing time of the current step which starts from the moment the approver on the step receives the approval flow and ends when the approval is approved or returned from this step.
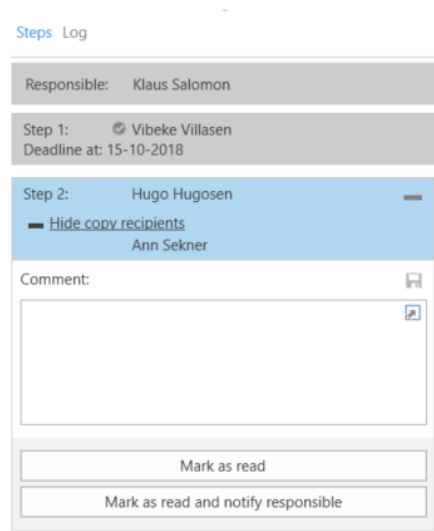
Figure 19: Copy recipient's approval processing options

There are two ways in which a copy recipient can process an approval:

- **"Mark as read"**: The copy recipient acknowledges having seen the approval.

- **"Mark as read and notify responsible"**: The copy recipient acknowledges having seen the approval, and the responsible user receives the approval in their inbox with a notification that it has been seen and commented on by the copy recipient. This way the copy recipient ensures that the responsible user is aware of the copy recipient's comment.

When an approval is marked as read, an eye icon is displayed next to the copy recipient's name. It is registered in the activity log of the approval that the copy recipient has marked the approval as seen.
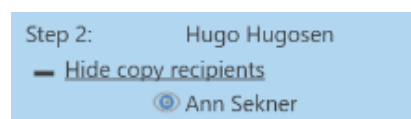
Figure 20: "Seen" mark for copy recipient

Both users and units can be defined as copy recipients on an approval step.

Give approvers write access to the record's case

It is possible to give approvers write access to the case to which the approval record is attached.

To give an approver write access to the case, tick the box "Give approvers on this step access to the record's case" on the desired approval steps. This can be done when an approval is being created or edited.

This setting is saved when an approval flow is saved as an approval template.

When the approval has been finally approved, the write access given at the time of creation or editing is automatically revoked.

Give approvers write permission to the record's case

Figure 21: Give approvers write access to the record's case

Note: It is not possible to give write access to approvers who have already received the approval.

Note: If a case has been assigned limited access properties, users who have not been granted access to it do not receive access even if the box "Give approvers on this step access to the record's case" is ticked.

Note: A user who can handle approvals on behalf of another user does <u>not</u> obtain write access to the record's case. The write access is limited to the specified approver.
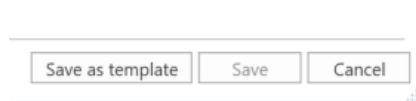
Creating an approval template

If a given approval flow will be used more than once, it can be saved as an approval template.

There are two template types:

- Personal approval templates: Created by a user and can only be viewed and accessed by this user.

- Shared approval templates: Available to the entire organisation and/or selected units. Shared approval templates are created by a user with the "Template administrator" privilege, who determines to whom the approval template is available.
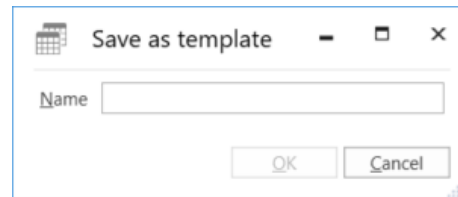
Both template types are created by clicking on **Save as template** in the dialogue shown below.

Figure 22: Save new template

Personal approval templates: Name the approval template and save it by clicking on **OK**.

The template is now saved as a personal template and can be accessed by the user the next time a new approval is created.

Figure 23: Save personal approval template

Shared approval templates: The following setup is only available to users with the "Template administrator" privilege. Name the approval template, tick the field "Template location", and select whether the template should be available to all users in the organisation or to a certain unit only (the organisation/unit must be selected).

Click on **OK** to save the template. It can now be accessed by the selected users.

Ticking "Template location" activates the location provision for this shared template
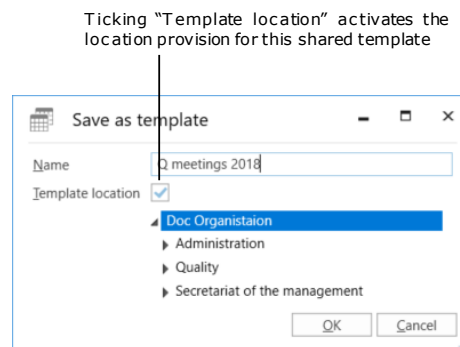
Figure 24: Save shared approval template

Note: The option to save personal approval templates can be deactivated. For more information, see the section *Configurations for F2 Approvals.*

Personal and shared approval templates can be accessed in the "New approval" dialogue or the "New record" dialogue.

Editing and deleting approval templates

Personal and shared approval templates can be edited and/or deleted from the "Settings" tab in the main window. Click on **Approval templates** in the "Templates" menu item.
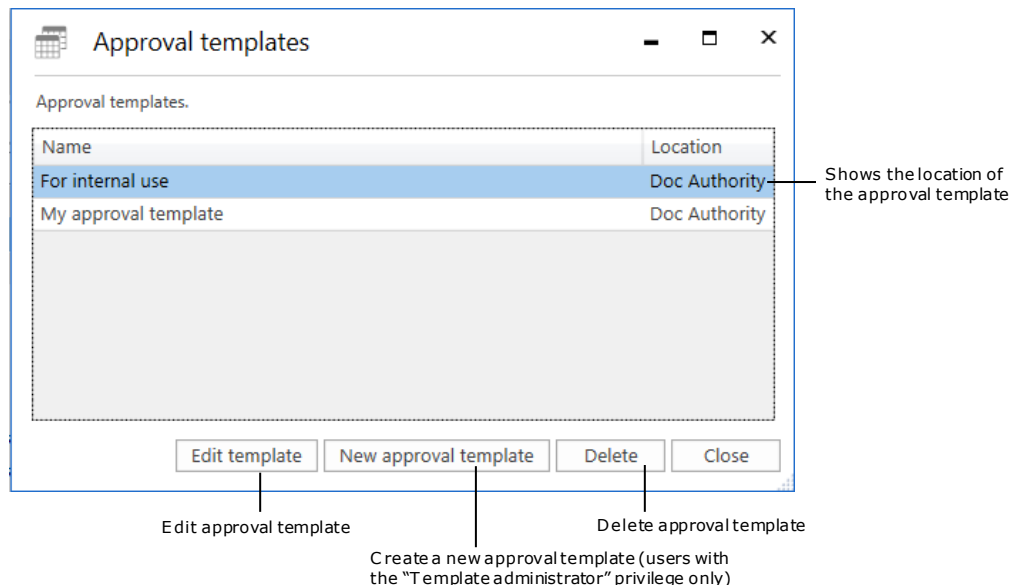

Approval templates
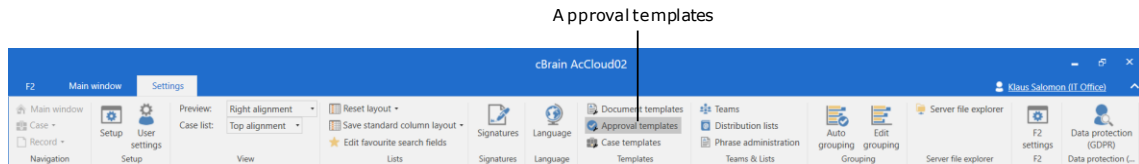
Figure 25: The "Templates" menu item

The "Approval templates" dialogue opens to show an overview of approval templates that the user is authorised to view and delete.

> **Note**: Only users with the "Template administrator" privilege can edit or delete shared approval templates.

For users with the "Template administrator" privilege both personal and administrator-configured templates are displayed. In the "Location" column, the user can see the location of the approval templates.

To edit or delete an approval template, highlight the relevant template in the dialogue and click on either **Edit template** or **Delete**.


Shows the location of the approval template

Edit approval template

Create a new approval template (users with the "Template administrator" privilege only)

Delete approval template

Figure 26: Edit or delete approval template

Deleted approval templates cannot be restored, but must be recreated.

Users with the "Template administrator" privilege can create approval templates directly from the "Approval templates" dialogue. Click on **New approval template** to open the dialogue. From here an approval flow can be set up and saved as a template. For further information, see *Setting up an approval flow.*

Personal settings for standard approval templates

Each user can select a standard approval template. This personal setting can be found on the "Settings" tab in the main window. Select the **Setup** menu item and, in the dialogue that opens, select the **User** tab. In the "Standard approval template" drop-down menu, select the desired approval template. This function is useful e.g. when creating new templates or editing user settings.
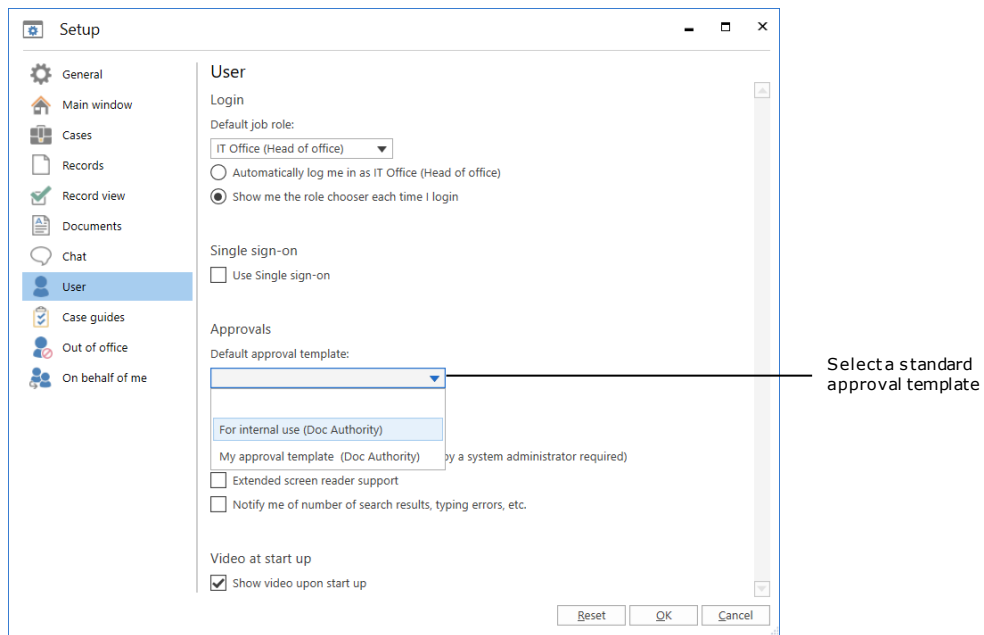
Figure 27: Choose a standard approval template

Approval structure

Once an approval is created, the approval record opens. This is the record on which the approval is placed.

The approval record consists of several approval fields, which contain the metadata specifically related to an approval. These metadata are displayed at the top and at the right side of the approval record and show e.g. the approval flow, key approval information and the handling options for the responsible user and the approver, as shown below.
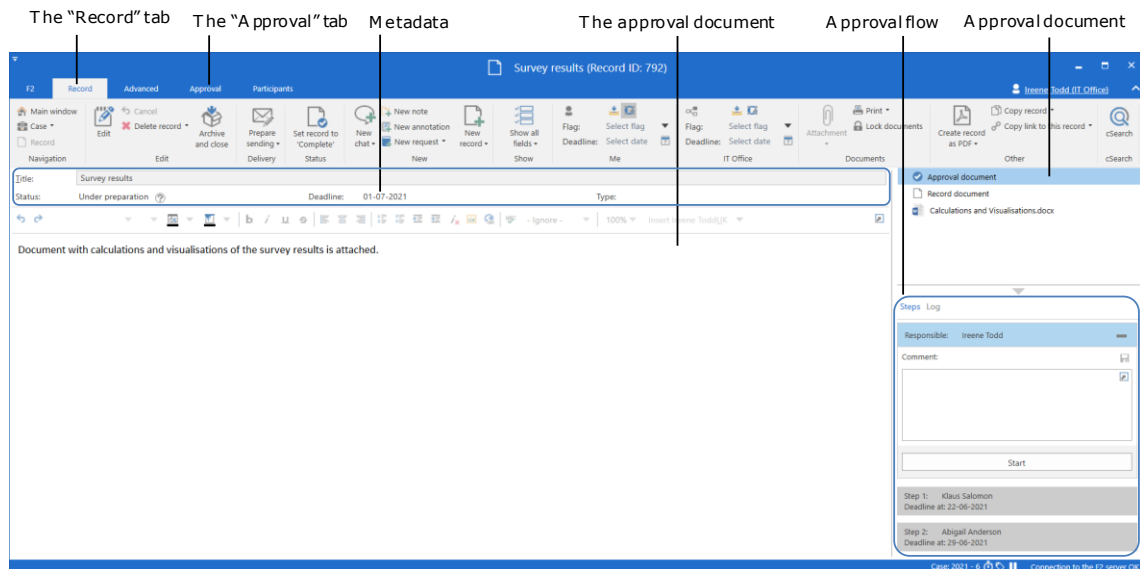
Figure 28: Newly created approval record

In addition, there may be documents, comments, etc. attached to the approval record.

This means all approval-related information is gathered in one place. Hence, it is possible to simultaneously create approval actions and make document changes.

Changes to the approval flow can be made in the "Approval" tab. Read more in the section *Making changes to the approval flow*.

The approval metadata

The approval metadata are displayed at the top of the record and elaborated in the following table.
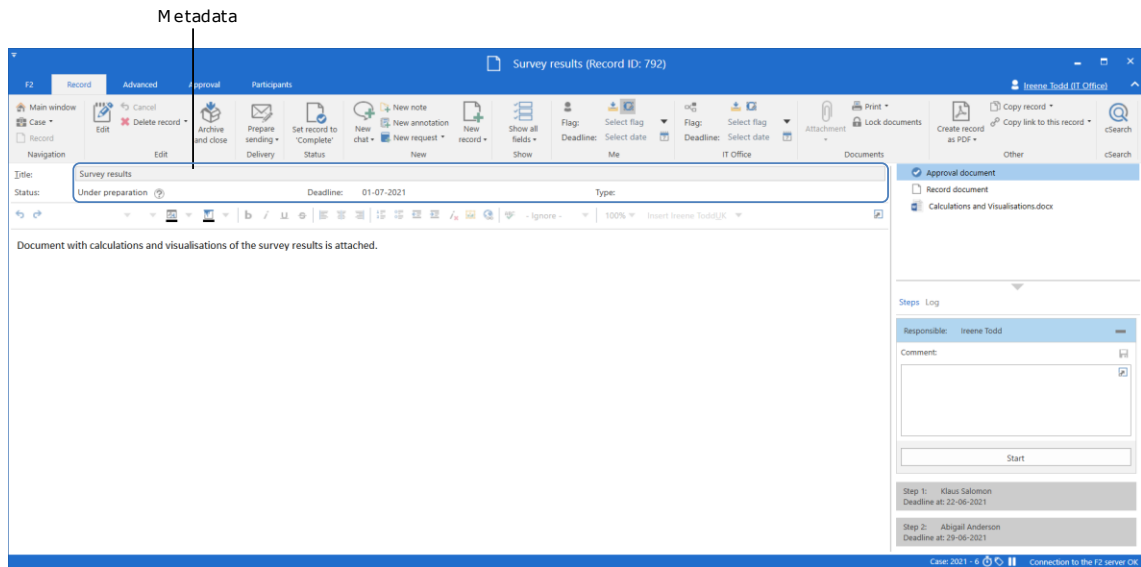
Figure 29: Approval metadata and action flow

Function	Purpose
"Title"	Specifies the title of the record and serves as the approval's headline.
"Status"	Shows the status of the approval. Click on ⓘ to see a detailed status clarification.
"Deadline"	Specifies the date and time for the final approval.
"Urgent"	"Urgent" is displayed after the deadline if the responsible user ticked the box when creating the approval.
"Type"	Indicates the type of approval. Depending on the installation, different approval types can be defined when managing the value lists.

Approval document

The approval document is shown below the metadata fields if it has been selected on the right.

The approval document is separate from the record document and is intended to contain a description of the approval. Text formatting in the approval document is similar to that of the record document. The approval document can contain information for the front page of the approval.
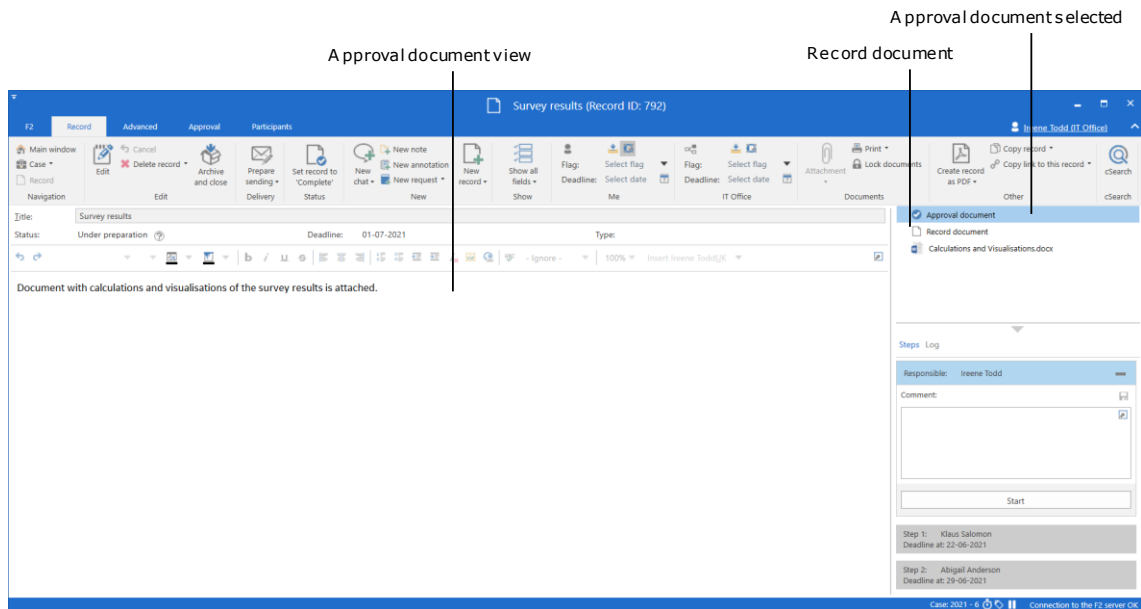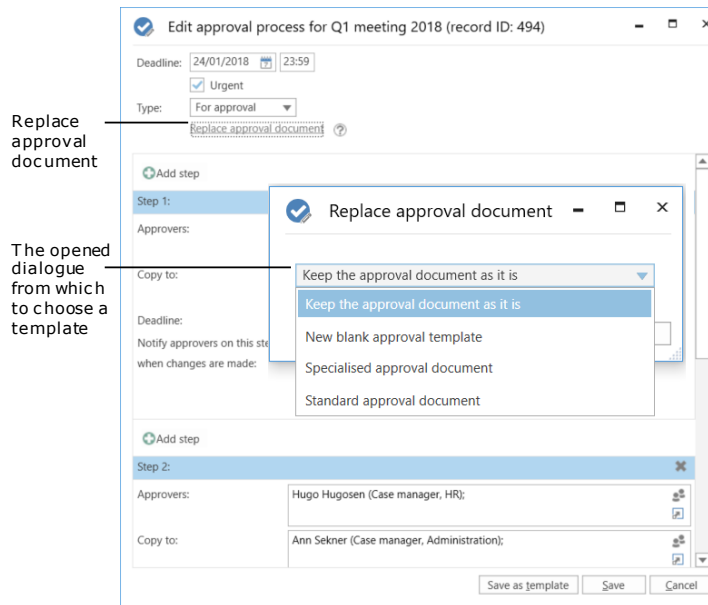

Figure 30: Approval document

If the record on which the approval is placed is sent as an email, it is the record document that is displayed as the email body. The approval document is not enclosed when the record is sent as an email. The approval document should be regarded as an internal document.

> **Note**: Users can make changes to the approval document if they have write access to the approval record's documents.

An approval document can be replaced with another approval document by clicking on **Replace approval document** in either the "New approval flow" dialogue or "Edit approval flow", depending on whether the user is creating a new approval flow or editing an existing one.

Clicking on **Replace approval document** opens the "Replace approval document" dialogue, as shown below. Click on the **down arrow** in the dialogue to select a new approval template from the drop-down menu.

Figure 31: Replace approval document

> **Note**: To make approval documents available to the entire organisation, further configuration in cooperation with cBrain is required. For further information, see the section *Creating an approval template*.

Select a new approval document and click on **OK**. Near the top of the dialogue ("New approval flow" or "Edit approval flow") a bracketed text informs the user that a new approval document has been selected.
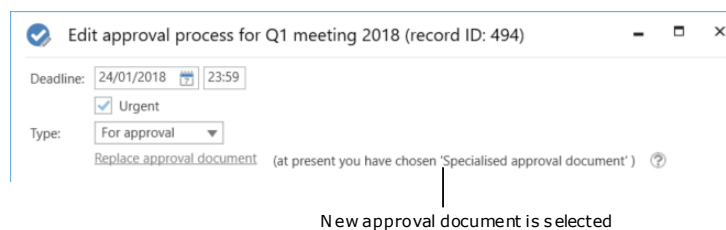

Figure 32: F2 informs the user which approval document has been selected

Click on **Save** at the bottom of the dialogue to replace the approval document.

A warning dialogue opens to inform the user that the current approval document will be overwritten and any changes made to it will be lost.

Click on **Yes** to overwrite the existing approval document. To cancel this action, click on **No**.
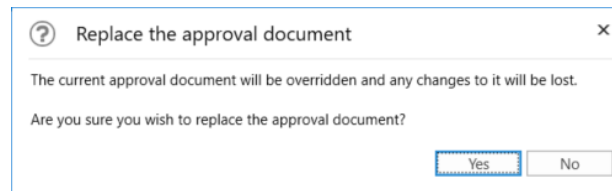
Figure 33: Replace approval document - Yes/No

The record document

Open the record document by selecting it in the right side of the record window. If an approval is created without a record document, it is possible to create the record document later. This is necessary if the approval record must be sent as an email as it is the record document that will be displayed as the email's content.

During the configuration of F2 the organisation can decide which options are available when creating approvals without approval documents. Read more about this in the section *Configurations for F2 Approvals.*

Creating a record document

To create a record document on an approval record, set the record in edit mode. Then click on **Create record document** on the "Advanced" tab in the record window. The record document is created and can be found below the approval document. This record document can be edited just like any other record document.

Note: The record document cannot be deleted once it has been created.

Create record document

An approval without a record document

Figure 34: Create a record document
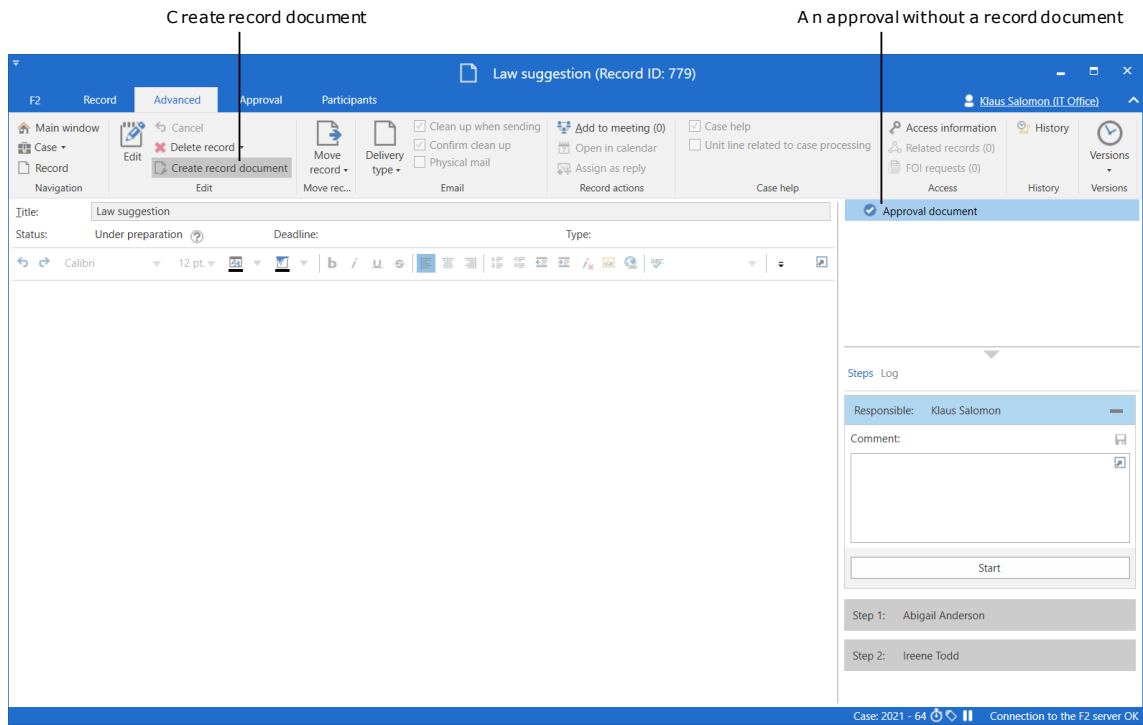
Start approval flow

The approval is processed on the right side of the approval record. All options for handling the approval are listed here.

The approval view is divided into two different flow overviews.

- **"Steps"**: The processing of the approval takes place here and the current location of the approval is displayed.
- **"Log"**: An overview of the action flow and current status is displayed here. The log is described in detail in the section *The activity log*.

Change between the two views by clicking on either **Steps** or **Log**.
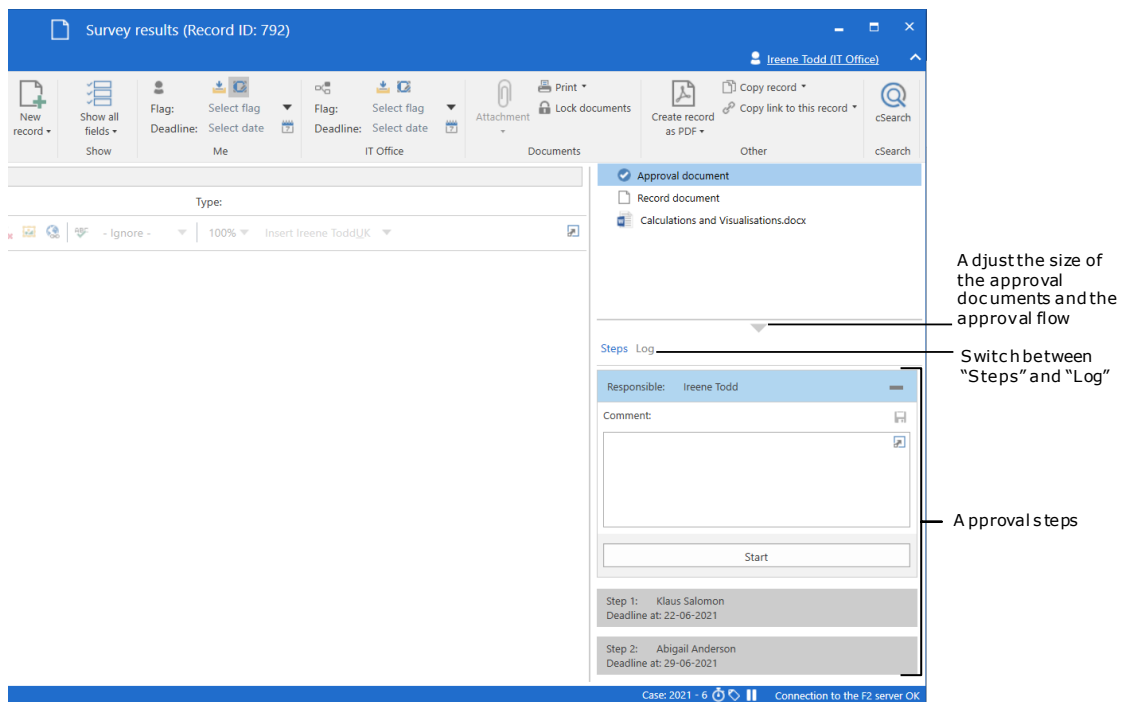
Figure 35: Overview of the approval flow

Figure 36: Display of approval flow

The approval flow is displayed step by step, each with its own box. The responsible user, i.e. the creator of the approval, is at the top of the list.

Each remaining step represents a part of the approval with the chosen approver(s).
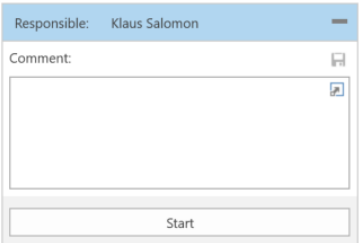
The colours indicate where in the flow the approval is currently located. In this example, Klaus Salomon is blue, which means that the approval currently is in his hands.

Click on the ✚ icon to expand the options that are available to either the responsible user or the approver.
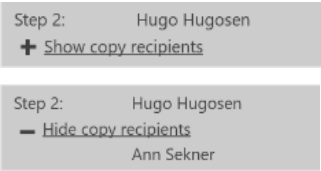
Click on the ▬ icon to hide the processing options.

> **Note**: These icons are only visible to the responsible user or approver when the approval is on the current approver's step.
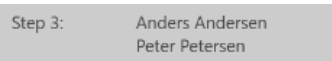
In the following table, the functionalities for the "Steps" overview are described.

Responsible

	The responsible user, in this case Klaus Salomon, creates and initiates the approval flow. In the "Comment" field it is possible to write a comment with relevant information. Click on 🖫 to save a comment. **Note**: All approvers can see the comments when processing the approval. Click on **Start** to start the approval flow.

Step 1

	Step 1 is the first approver. In this example, this is Vibeke Villasen. This approval step has a specified deadline for its approver (15/10/2018).

Step 2

	Step 2 is the next approver in the approval flow – in this case, Hugo Hugosen. This approval step has copy recipients. Click on **Show copy recipients** in order to see them. After clicking on **Show copy recipients**, its title changes to "Hide copy recipients" and the copy recipients on the approval step are displayed – in this case, Ann Sekner. Click on **Hide copy recipients** to hide the copy recipients. The title changes back to "Show copy recipients".

Step 3

	Step 3 is the final step in the approval flow. There can be several approvers on the same step, in which case they are listed as shown in the example. Here the approvers are Anders Andersen and Peter Petersen.

Before an approver can perform any approval actions, they will be asked to save any unsaved changes to the record.

If the current approver makes changes to an approval record or any attached documents and then perform their approval action, the dialogue "Save changes?" appears. The current approver must then click **OK** to save the changes to the approval record.

As a result, the following approver, when receiving the approval, will not see an unnecessary notification stating that changes have been made.
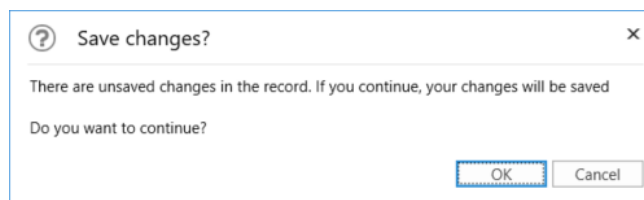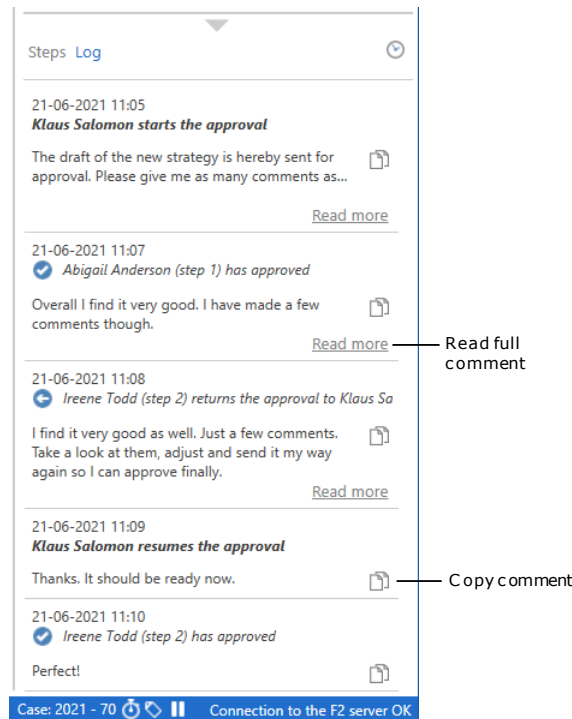

Figure 37: The "Save changes?" dialogue

The activity log

Click on **Log** in the approval flow to switch from an overview of the approval flow to the activity log.

The activity log describes, line by line, the approval actions taken in the approval flow, as shown below.

Figure 38: Approval process activity log

All changes made by the approver currently viewing the log are bolded.

Any comments to the individual approval steps can be copied from the activity log by clicking on the **Copy comment** ⧉ icon. The copied text is saved to Windows' clipboard and can be inserted in e.g. a record or a chat by either pressing **Ctrl+V** or by right-clicking and choosing the **Paste** option where available.

Click on **Read more** to read the full comment.

> **Note**: Changes made to the approval record or attached documents do not appear in the activity log.

On behalf of in the activity log

It is possible to approve on behalf of another user if "On behalf of" privileges are granted. It is also possible to approve on behalf of a unit if the user's unit is selected as approver.

The user who has processed the approval on behalf of another user or unit is displayed in the activity log.

Figure 39: The activity log with a user approving on behalf of a unit

Read more about how "On behalf of"-privileges are granted in *F2 Desktop – Settings and Setup*.

Viewing document versions

In the "Log" it is possible to view older versions of the approval record's documents. Older versions can also be accessed via the "Approval" tab.

Click on **Show document versions** ⏱ to display the approval record version above the document selector. A set of numbers in parentheses appear in front of the documents indicating the version of each.
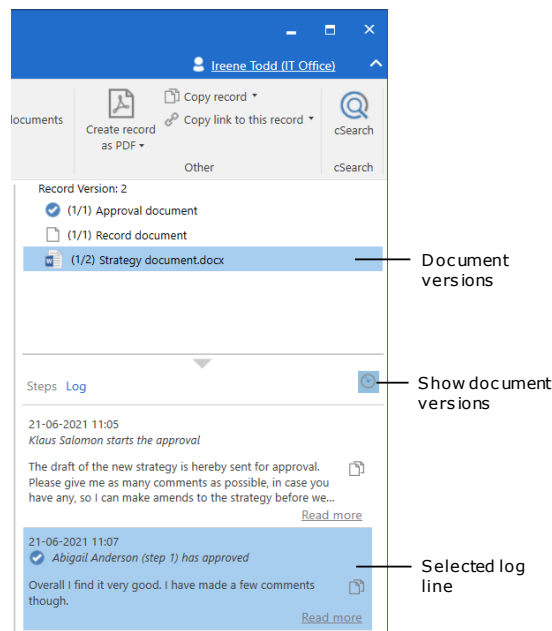
Figure 40: Show document versions in activity log

Click on a log entry when the "Show document versions" view has been selected to view the older versions of the record along with any attached documents. This makes it possible to follow the approval's development, the work process and previous document versions. The first number in the sequence shows the document version that will open if clicked. The latter number shows the total amount of

versions that exists. For example, if the numbers read "(5/5)", the document will open in version five out of five.

The previous versions are also displayed in the preview so it is not necessary to open the document to view a previous version. This facilitates version comparison along with the ongoing preparation of approval documents.

A new document version is created every time a document is updated. A new record version is created when changes are made to the approval record itself or to the approval flow.

Exit version view by clicking on **Show document versions** 🕒 again.

> **Note**: When "Show document versions" is turned on, it is not possible to make corrections to the approval record or to the approval flow.

Create a new record version when deleting documents

It is possible to create a new version of the record when any attached documents are deleted by another user.

When a document is deleted, a dialogue will appear allowing the user to create a new version of the record. This is illustrated in the figure below.
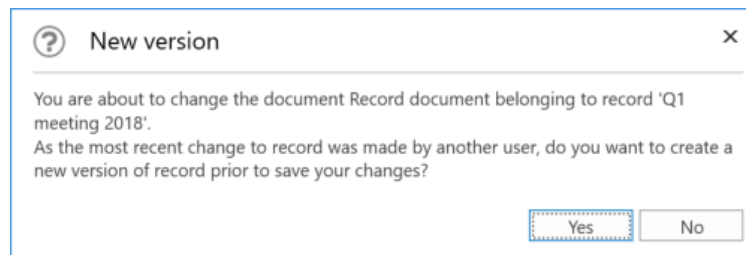
Figure 41: The "New version" dialogue

Receiving and managing approvals

When an approval is started, the first approver on step 1 receives the approval in their inbox.

Hover the cursor over the approval icon in the result list to see:

- At which user the approval is pending.
- Whether the approval has been returned.
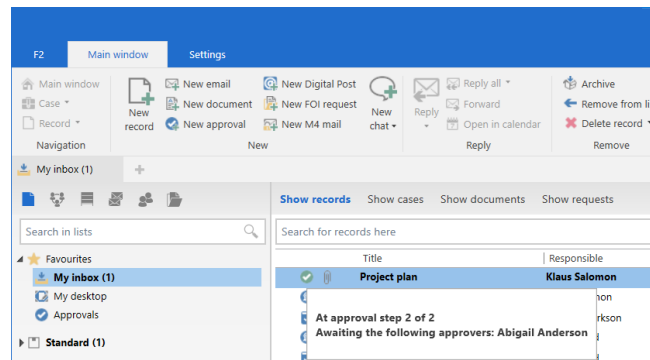
Figure 42: Approval received in the inbox

When the approval record is opened, the approver can start processing it. The approver has the following processing options:

- Return
- Approve.

Figure 43: Display of approval process

The blue highlight in the approval flow shows that the approval is now on step 2, in this case with Hugo Hugosen.
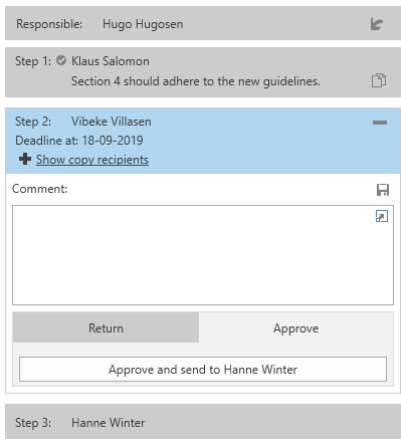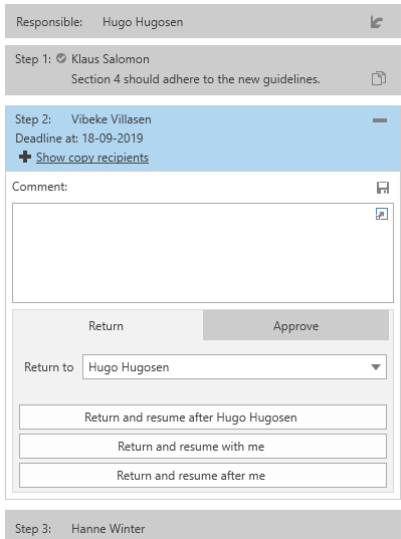
An approval can be withdrawn by the responsible user or by the current approver by clicking on the ⤶ icon ("Withdraw approval") on the step of the responsible user.

An approval can also be withdrawn by a previous approver by clicking on the ⤶ icon ("Undo approval") on the approver's own step. To withdraw an approval, it must first have been approved.

Read more about this in section *Returning, undoing and withdrawing an approval.*

The table below describes the approver's processing options.

Approve

Responsible: Hugo Hugosen Step 1: ✔ Klaus Salomon Section 4 should adhere to the new guidelines. Step 2: Vibeke Villasen Deadline at: 18-09-2019 + Show copy recipients Comment: [Return] [Approve] [Approve and send to Hanne Winter] Step 3: Hanne Winter	Select the "Approve" tab to approve. It is possible to add a comment in the "Comment" field. Click on **Approve and send to [username]** to send the approval to the next step in the flow – in this case, step 3. When the user on the last step clicks on **Approve**, the approval is final and the approval flow is then complete.

Return

Responsible: Hugo Hugosen Step 1: ✔ Klaus Salomon Section 4 should adhere to the new guidelines. Step 2: Vibeke Villasen Deadline at: 18-09-2019 + Show copy recipients Comment: [Return] [Approve] Return to Hugo Hugosen ▼ [Return and resume after Hugo Hugosen] [Return and resume with me] [Return and resume after me] Step 3: Hanne Winter	Select the "Return" tab to return the approval. It is possible to add a comment in the "Comment" field. Select the step to which the approval must be returned in the "Return to" field. Any approval step except for the user's own can be selected. By default, the name of the user who created the approval is shown in the "Return to" field. Click on **Return and resume after [selected user name]** to return the approval to the selected user, in this case Hugo Hugosen. The approval flow starts over from this user, and the record must be approved again on all subsequent steps. **Return and resume with me** returns the approval to the specified user (here to the creator: Hugo Hugosen). After processing, the approval returns to the current user, i.e.

Vibeke Villasen on step 2, skipping any in-between steps.

Return and resume after me (conditional approval): The approval is returned (here to the responsible user: Hugo Hugosen), and after processing the approval flow is resumed after the current approver's step, i.e. step 3, as if the approval had just been approved on step 2.

Resume with

The "Resume with" option is displayed when an approval has been returned, undone or withdrawn.

Use "Resume with" to restart the approval process.

The responsible user/approver has the following options:

To restart the approval process and go through all approval steps again: In other words, the approval is resumed with Klaus Salomon (step 1).

To skip the approval step before the current approver's own approval step ("Resume with me"): The approval is resumed with Vibeke Villasen (step 2) and step 1 (Klaus Salomon) is skipped.

To resume the approval flow after the current approver's step: Vibeke Villasen has approved conditionally, and the responsible user is advised to resume the approval process with Hanne Winter (step 3).

The return options depend on the given approval step and on the recommendations of previous approvers.

  Note: The responsible user does not have to follow the recommendation if there are several options for resuming the flow.
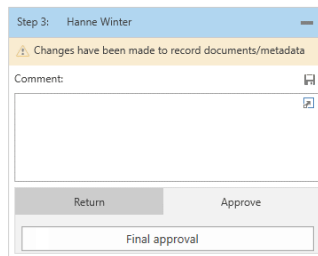
If the "Changes have been made to record documents/metadata" notification is displayed, changes have been made after the approval has been sent to the current step.

Click on the triangular warning symbol ⚠ to view an account of the changes.

The following record actions have taken place since the approval process reached your inbox:

Create new record version.
Document content changed: 'CSR report'
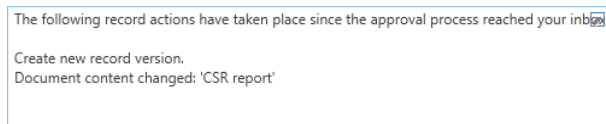
Figure 44: Changes to the record document/metadata

Returning, undoing and withdrawing an approval

When an approval is returned, undone, or withdrawn, the approval flow temporarily stops.

Returning an approval

By clicking **Return**, the approval returns to a previous step with a notification that the approval cannot be approved. This can be done in three different ways, each of which indicates the degree of changes necessary before the approval can be approved (see the table above).

- **Return and resume after [user name]**: The selected return recipient starts the approval flow from the beginning and the approval must go through all approval steps again (complete return).

- **Return and resume with me**: The approval is returned to a previous step in the approval flow. The return recipient then sends the approval back to the current approver (return for correction).

- **Return and resume after me**: The approval is returned for minor corrections before the approval flow continues to the next step in the original flow (conditional approval).

When returning, the approver has the option to add a comment on why the approval is returned.

When the approval is returned, the approval process stops temporarily and must be resumed after the reason for the return has been resolved.

Undoing an approval

"Undo" is used when an approver wants to revert their approval and bring back the approval to their step from a subsequent step. This can only be done if the approval has not been finally approved. The approver can only undo their own approval.

To undo an approval, the approver clicks on ![icon] on their own step. The approval flow is thereby temporarily stopped.

Withdrawing an approval

Unlike "Undo", "Withdraw" covers the entire flow and does not just undo a single step. When an approval is withdrawn, it is reverted to the user responsible for creating the approval. To withdraw an approval, click on ![icon] on the step of the responsible user. The responsible user may withdraw their approval at any time.
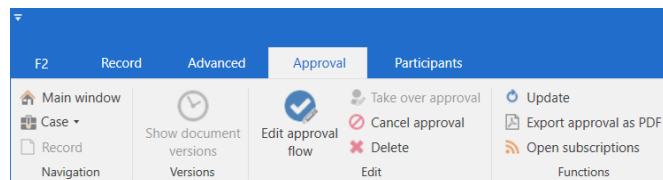
Withdrawing an approval temporarily stops the approval flow, but does not cancel an approval. A withdrawn approval can still be resumed.

Resuming an approval
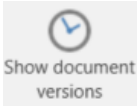
An approval that has been returned, undone or withdrawn is still in an active process and can therefore be resumed. To resume the approval, click on **Resume with: [Username].**
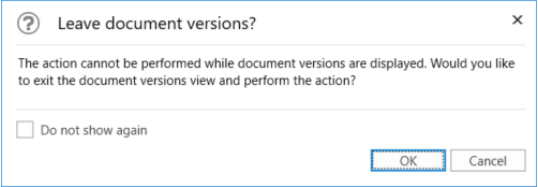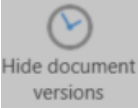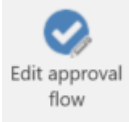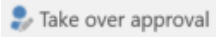
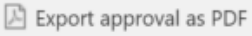## Making changes to the approval flow
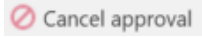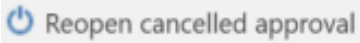
Making changes to an approval flow is done via the "Approval" tab. The menu items are described below.

Figure 45: Approval tab

Function	Description
Show document versions	Shows the current versions of the approval record's approval document, record document and, if applicable, attached documents in the document selector.
	When viewing document versions, the approver cannot process the approval. The approver will receive a warning about this from F2. See the dialogue below.

Function	Description
	Figure 46: Edit approval flow **Tip**: There is a corresponding function in the activity log. Read more in the section .
Hide document versions	Changes the menu item back to "Show document versions" and no longer displays the version numbers.
Edit approval flow	Makes it possible to modify an already initiated approval flow. The approval flow can be entirely changed as long as it has not yet started. If the approval has started, the already approved steps cannot be modified, but the pending steps can be edited, deleted and/or added to. A finally approved approval cannot be modified. See the section *Editing the approval flow* for more information.
Take over approval	Allows a user who is not a participant in the approval flow to take over an approval, e.g. in the event of illness or holidays. However, this user must have write access to the record. This lets a user take over an approval and replace/remove approvers, even if they have already received it in their inbox (but not yet processed the approval). When an approval is taken over, a note is created on the record denoting the changes and the affected participants (i.e. the user responsible for the approval as well as the approvers that have been added and/or removed) are notified via the note in their inboxes.

Function	Description
	Approvers or approved steps cannot be removed and/or replaced.
⊘ Cancel approval	Stops an ongoing approval flow, and the approval is removed from the "Approvals" list in the main window. When an approval is cancelled, a note is automatically created that states it has been cancelled and by whom.
⏻ Reopen cancelled approval	Reopens a cancelled approval. The approval will be resumed from the step at which it was cancelled. The approval is again displayed in the list of "Approvals" in the main window. The menu item "Reopen cancelled approval" changes to "Cancel approval". The approval note is updated with the information that the approval has been reopened after cancellation.
✖ Delete	Users with write access to the approval record can cancel and delete an approval. An approval can only be deleted after it has been cancelled.
⟳ Update	Shows the latest changes/additions to the approval.
Export approval as PDF	Creates a PDF version of the current approval which contains the approval document and the approval information. Read more about this in the section *Send an approval to an external participant*.
Open subscriptions	Adds users as subscribers if they are not directly involved in the approval, but should receive updates on the approval process. Subscribers receive a notification in their inboxes every time the approval process advances. This also applies to approval returns.

Editing the approval flow

Provided that the approval is in process, changes can be made to the flow and to the approval metadata provided. It is not possible to edit steps that have already been processed.

Click on **Edit approval process** in the "Approval" tab to open the dialogue "Edit approval process for [name of approval record]" as shown below.

Only users with write access to the record can edit the approval flow.

Figure 47: Edit approval flow

All corrections to the approval flow are listed in the activity log. Changes are not displayed in the activity log, but a note is created stating "[user name] edits the approval". A user who makes changes to the approval flow can elaborate on these changes in the comment field. The comment is displayed under the line "[user name] edits the approval", as shown below.

Figure 48: Example of a comment to a change in the approval flow

The changes can only be saved if the user has write access to the record.
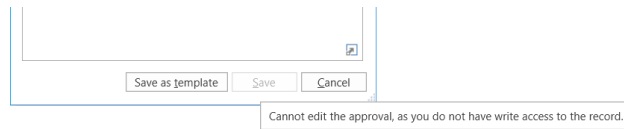
Figure 49: Tooltip informing the user that the changes cannot be saved
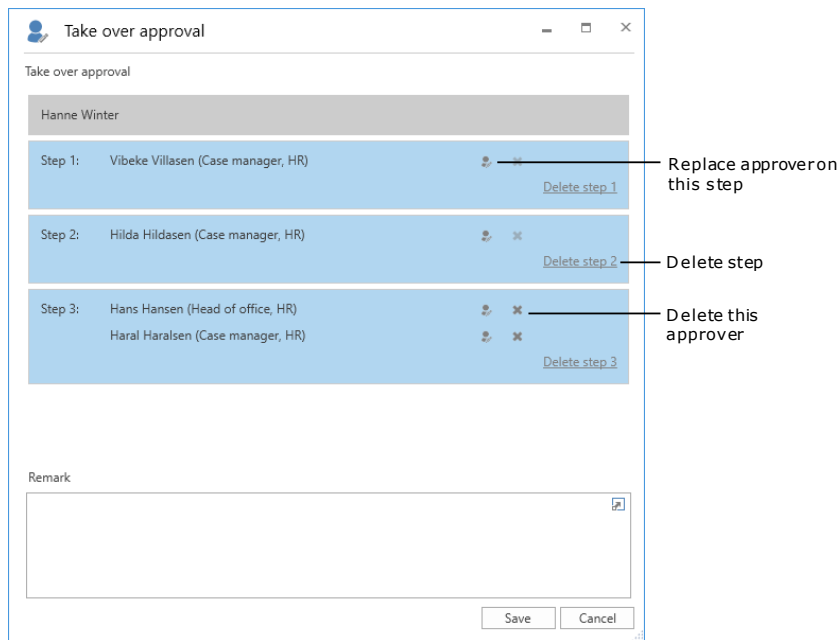
Taking over an approval

When a user takes over an approval, they cannot create new approval steps or add approvers. This ensures that the approval flow structure does not change.

Taking over an approval is useful in case an approver is absent or ill, so that their step can be either completely removed or replaced with another approver. Users with write access to the record can take over the approval and make changes to the flow.

Click on **Take over approval** in the "Approval" tab to open the dialogue below.

This dialogue shows the entire approval flow. The grey field is the responsible user who created the approval, and the blue fields denote the different steps.
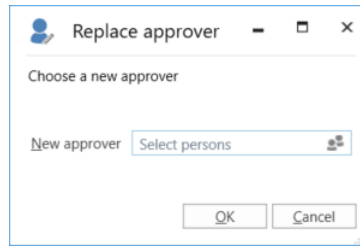
It is possible to replace and/or delete approvers and approval steps. Approvers and approval steps, however, cannot be replaced or deleted if the step has already been approved.

Figure 50: Take over approval

Clicking on the icon for replacing an approver opens the dialogue below in which a new approver from the participant register can be selected.
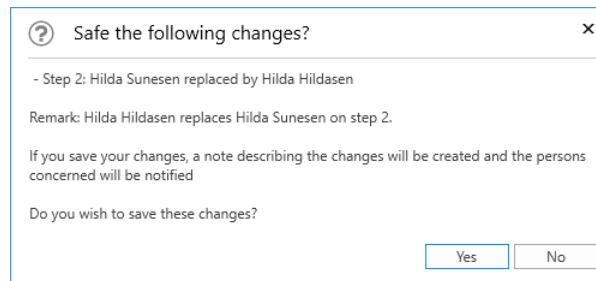
Figure 51: Replace approver

The user who makes changes with "Take over approval" can write a comment, which will appear in the activity log of the approval.

After clicking **Save** in the "Take over approval" dialogue, F2 asks the user to confirm.

Figure 52: Save changes

If no comment is entered in the comment field, the activity log will only show who performed the takeover and on which step it occurred. The comment is therefore used to elaborate on the reason.
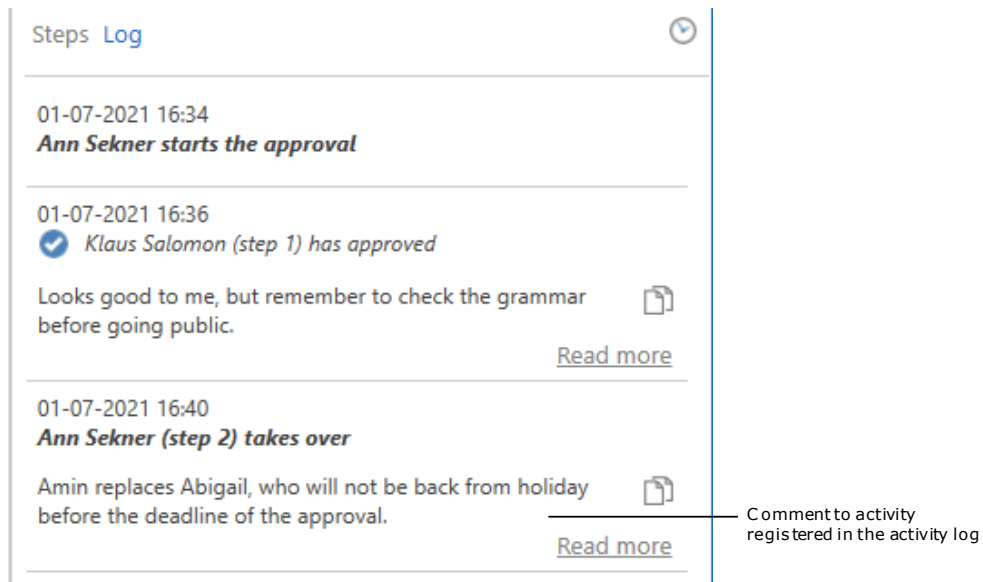
Figure 53: Comment in the activity log

Regardless of whether a comment is added, a note on the approval record is automatically generated when changes are made via the "Take over approval".

The note describes the action performed. Participants on the note include:

- The user who has taken over the approval and made changes.
- The user responsible for the approval.
- Approvers who have been removed from or replaced in the approval.
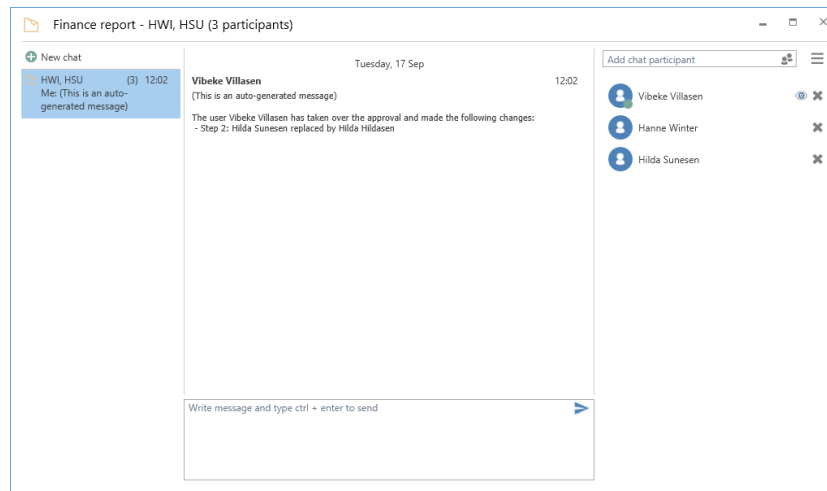
Figure 54: Note describing approval changes

Cancelling, reopening and deleting an approval

When an approval is cancelled, it is removed from the list of active approvals. In addition, a note regarding the cancellation of the approval is automatically generated. The following users are added as participants on the note:

- The user who cancelled the approval.

- The user who is responsible for the approval record.

- Any approvers who have already approved or returned the approval.

Additionally, the responsible user and any approvers receive the record in their inboxes to notify them of the cancellation.
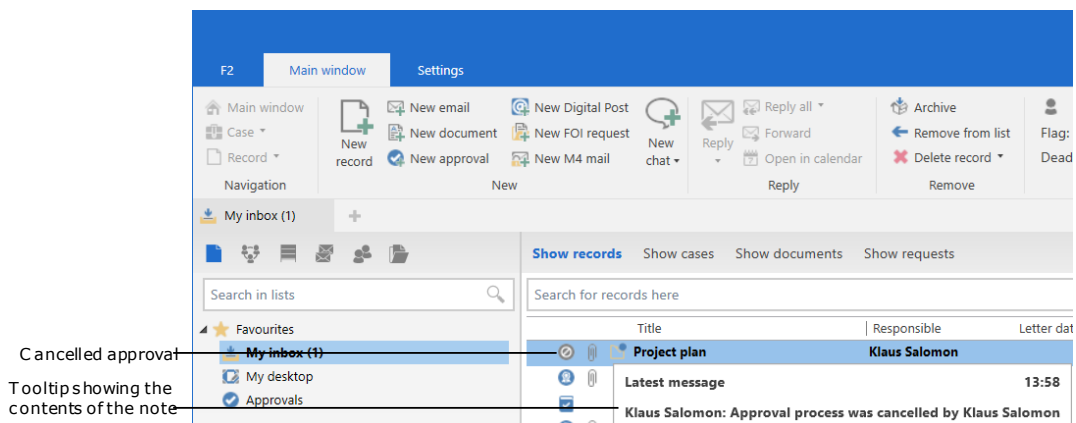
**Figure 55: Cancellation note shown in the responsible user's inbox**

The note is also displayed on the approval record and is visible to any user with access to the record.
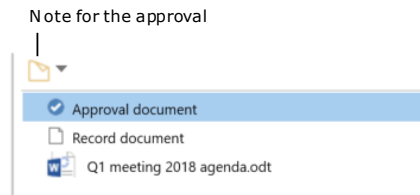
Figure 56: Note on the approval

Cancelled approvals are inactive, but can always be reopened. The approval record will keep existing and the created approval flow will still appear on the record.

To reactivate the approval, click on **Reopen** in the approval tab and the approval flow will be resumed. A new note is added when an approval is reopened.
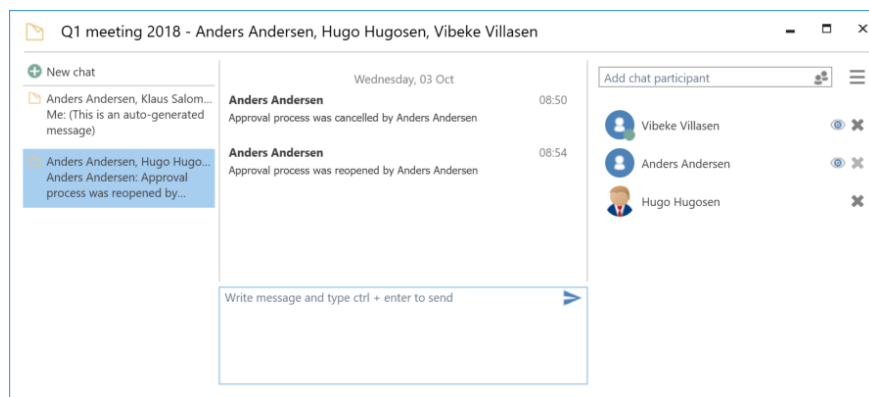
Figure 57: Note with description of reopening of approval

It is possible to search for cancelled approvals. Read more about this in the section *Creating specific searches for approvals*.

Approvals can only be deleted after they have been cancelled. Click on the **Delete** menu item to open the "Delete" dialogue as shown below.
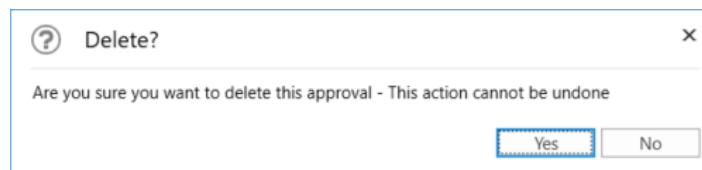

Figure 58: Delete

Click on **Yes** to delete the approval. This action cannot be undone.

When an approval is deleted, the approval record becomes an ordinary record, but any documents, the record document, and other metadata are preserved. If needed, a new approval on the record can be created.
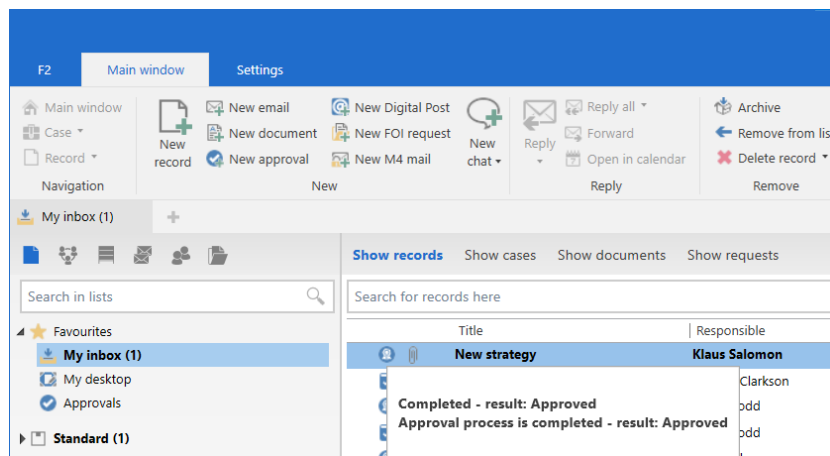
Final approval

When the last approver receives the approval and clicks on **Approval process final approval**, the approval is finally approved.
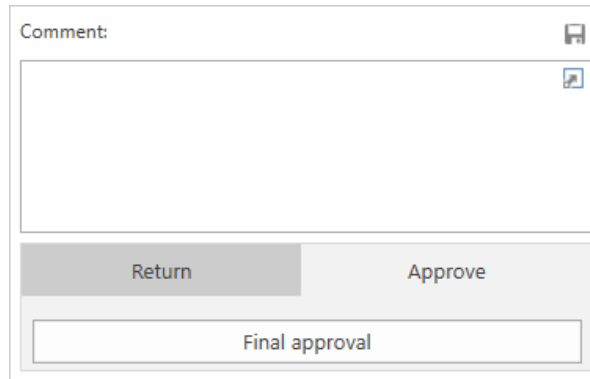
Figure 59: Final approval

The status of the approval then changes to completed, which is also evident from the approval icon in the result list. Hover the cursor over the approval icon to see that the approval has been finally approved and thus completed. The approval will disappear from the list of active approvals.

The responsible user receives the approval in their inbox when it has been finally approved.


Figure 60: Approval finally approved

Note: An approval which has been finally approved cannot be edited.

Send an approval to an external participant

If the approval record must be sent to an external recipient, the sender should be aware that the approval document and the approval information are not included when the record is sent as an ordinary email.

Click on **Export as PDF** in the "Approval" tab or on **Create record as PDF** in the "Record" tab to generate a PDF that can be saved on the record. The approval document and information will be included on the first page of the generated PDF, as shown below.
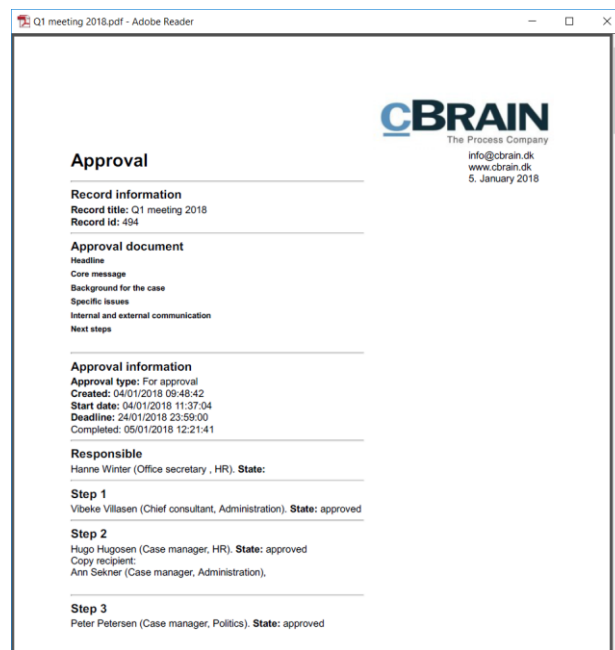
Figure 61: Displaying the approval document in a PDF file

Configurations for F2 Approvals

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

- Decide if users have the option of creating a "New empty approval flow". The organisation can decide whether users must use an existing approval template when creating a new approval or if they can create personal approval templates.

- The organisation can decide that only users with the "Template administrator" privilege can save approval templates.

- Decide whether it is possible to mark an approval as urgent. The "Urgent" checkbox is then visible when creating a new approval.

- Decide whether parallel approvers on an approval step are allowed, i.e. whether multiple approvers can be added to the same step of an approval flow.

- Define one or more templates for the approval document. Users can choose a new approval document by clicking "Replace approval document" when creating or editing an approval process. Additionally, approval documents can be linked to specific approval templates.

- Decide whether it is possible to add an approval on an already existing record. The module can be configured so new approvals cannot be created on records that already exist. Approvals can then only be created via the "Add approval" option from either the main window or the case window.

- Select which options are available when creating approvals with or without a record document. The following can be configured:

  o Whether a standard approval is created with or without a record document.

  o Whether a user is able to create the approval without a record document.

  o Whether a user is able to create a record document after the approval has been created.

- Decide if it is possible to create and edit approvals using F2 Touch (add-on module) using parts of the approval functionality from F2 Desktop. As a standard, it is not possible to create or edit approvals in F2 Touch. For more information about approvals in F2 Touch, please read *F2 Touch – User Manual*.

- Decide whether a record can be deleted if it contains an active approval.

- Decide whether a new version of the record is created following each approval action.

- Decide whether a warning appears to a user who edits a record with an ongoing approval process. The warning will appear if the user is not an approver on the current step.

- Decide whether users are warned when they attempt to send records with an ongoing approval process. This configuration only applies to F2 Desktop and the warning is only displayed here.

List of Figures

Appendix

A basic approval flow

The following pages demonstrate how a basic approval flow is created and executed. The approval process is reviewed step by step using two approvers and one user who is responsible (the approval creator).

Approval creator:

- Case manager Ann Sekner

Approvers:

- Head of office Klaus Salomon
- Department head Abigail Anderson

Case manager Ann Sekner has written a draft to a minister in response to a written inquiry. The draft must be approved. It is a response to the question: "Q424 Whether citizens are being monitored on the Internet".

The case manager's draft response is approved by following these steps:

Step 1: Create an approval

Case manager Ann Sekner opens the record with the draft response to be approved. The name of the record is "Draft response to Q424 Whether citizens are being monitored on the Internet". The record is located on case 2017 - 13 with the title "Section 20 Q424 Whether citizens are being monitored on the Internet".

Ann clicks on **Add approval** in the record window ribbon. This opens the "New approval" dialogue.
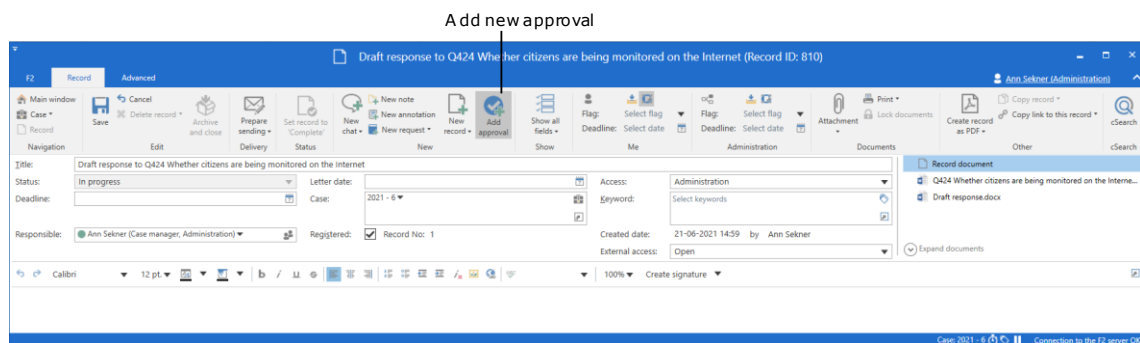
Figure 1: Create an approval

Since there is no predefined template for this approval process, Ann clicks on **New empty approval flow** and then on **OK**.

Select a template for the approval flow
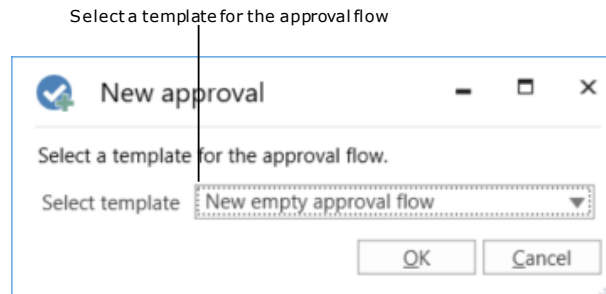
Figure 2: Select an approval template

Step 2: Set up an approval flow

An empty approval flow opens and Ann proceeds as follows:

- Ann writes "+5" in the "Deadline" field and presses **Enter**, because the Parliament must receive the response within five days.

- Vibeke clicks on the **down arrow** in the "Type" field and selects **For approval**.

- In the "Approvers" field on step 1, Ann enters the name of the head of office, Klaus Salomon, because he is the first person who must approve the draft response.

- In the "Deadline" field on step 1 Ann enters "+2" and presses **Enter**. This way Ann ensures that Klaus Salomon will approve the response in time to allow the department head to approve it too before the final deadline.

Figure 3: Set up an approval flow

- In order to add an approver after the head of office, Ann clicks on in the bottom left corner.

- "Step 2" is now added to the approval. In the "Approvers" field on step 2 Ann enters the name of the department head, Abigail Anderson, because she is the approver after the head of office.

- The setup of approval flow is then complete, and Ann clicks **Save**.

- Ann is back in the record window, and the record document opens.

The record document is selected
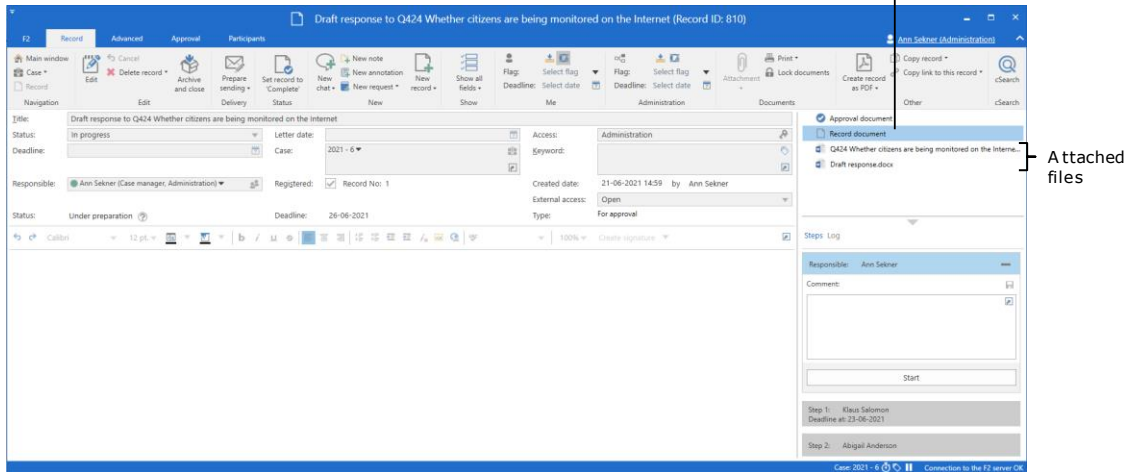
Attached files

Figure 4: Record with attached files and an approval flow

- As a result of the created approval, the record contains an approval document in addition to the record document. Ann clicks on **Approval document** in the record preview and enters the following: *Please approve the attached draft response to Q424.* The approval document is displayed in the figure below.

- Ann clicks on **Save** in the record window ribbon.

Step 3: Start the approval

- To start the approval flow, Ann clicks on **Start** in the approval overview to the right of the record window.

Open approval document

The responsible user (creator)

Start approval flow
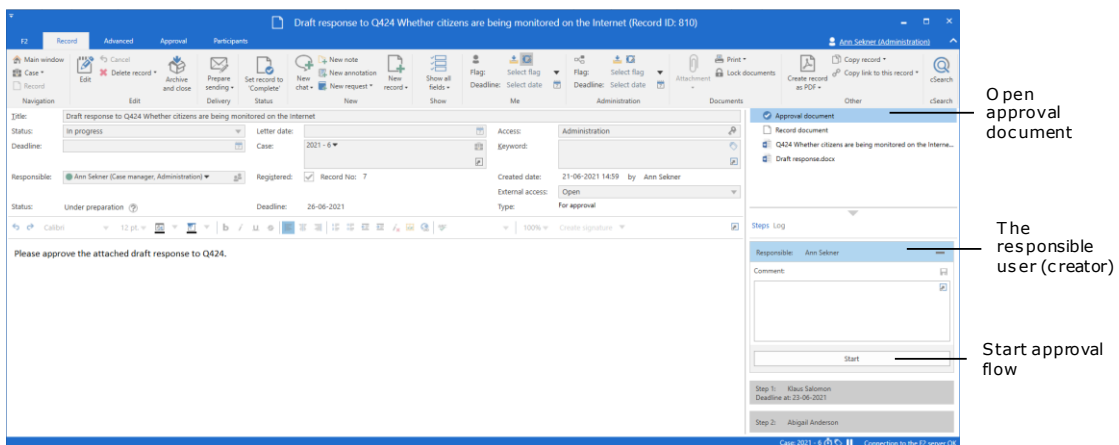
Figure 5: Start approval flow

Step 4: The approval is processed on step 1 (Approved)

- Approver on step 1, head of office Klaus Salomon, receives the record with the approval in his inbox. The name of the record is "Draft response to Q424 Whether citizens are being monitored on the Internet".

- Hovering the cursor over the approval icon next to the record, Klaus notices that there is an approval flow awaiting his approval.

- He selects the record.
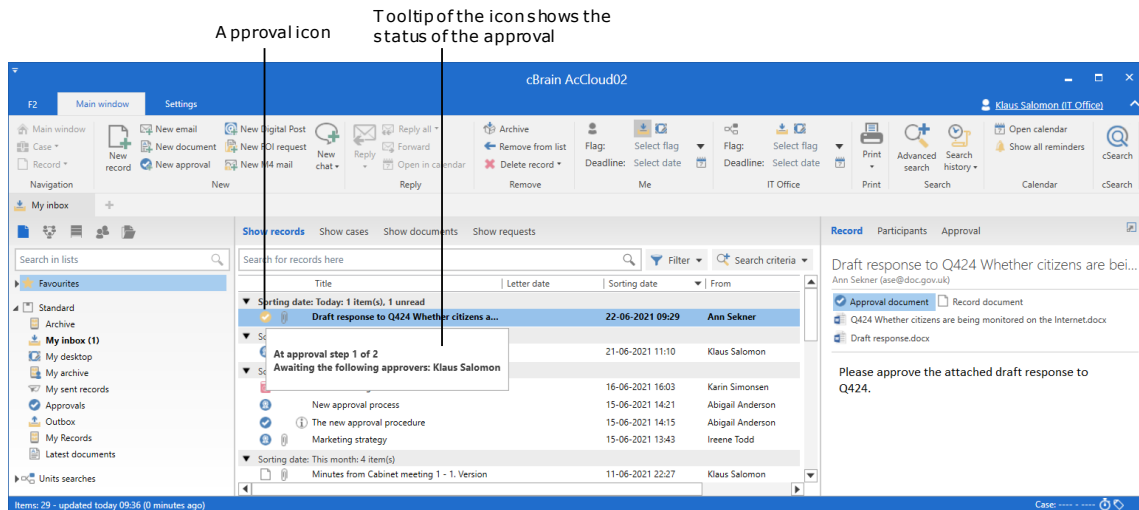

Figure 6: Approval in approver's inbox

- In the approval document preview to the right, Klaus reads that the approval concerns the attached draft response.

- Using the record preview, Klaus opens the question and the draft response by double-clicking first on the Word document "Q424 Whether citizens are being monitored on the Internet" and then on the Word document "Draft response".

- Klaus reads the two documents.

- Klaus is satisfied with the draft response and closes both Word documents.

- Klaus wants to approve the draft response.

- Klaus has been viewing the record in the preview so far. He opens it by double-clicking on it in the result list.

- The status of the approval flow is displayed to the right in the record window. Here, Klaus clicks on **Approve and send to Abigail Anderson**.

- The approval is now on step 2 in the approval flow – in the inbox of department head Abigail Anderson.
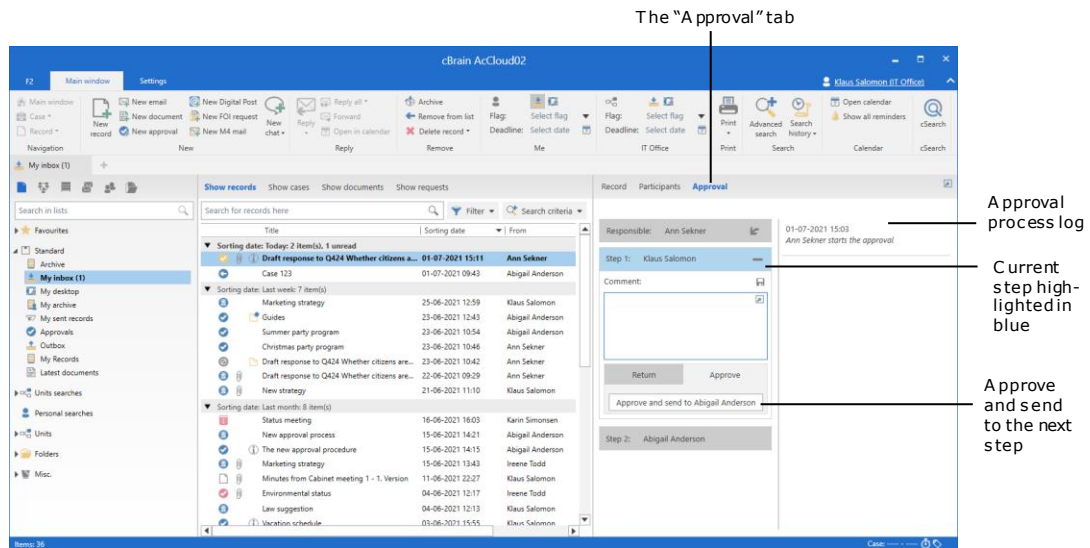
Figure 7: Approval of an approval

Step 5: View the current location of the approval

Case manager Ann knows that the approver on step 2, department head Abigail Anderson, is going on holiday tomorrow. Since she must approve the response before then, Ann checks whether the approval has reached the department head's step or whether it is still on step 1 with head of office Klaus Salomon.

- On the left side of the main window Ann clicks on the standard search "Approvals" to find the record.

- Ann finds the record "Draft response" and selects it.

- In the "Appl. Progress" column, Ann can see that the field with the department head's initials, AAN, is dark blue (the initials ASE are bolded because they are Ann's own initials).

- The dark blue colour in the field with the department head's initials means that the head of office has approved the response on the previous step. It is now awaiting approval on step 2 – from department head Abigail Anderson. The current placement of the approval is shown in the "Appl: Progress" column.

Column "Location"   Column "Appl: Progress"
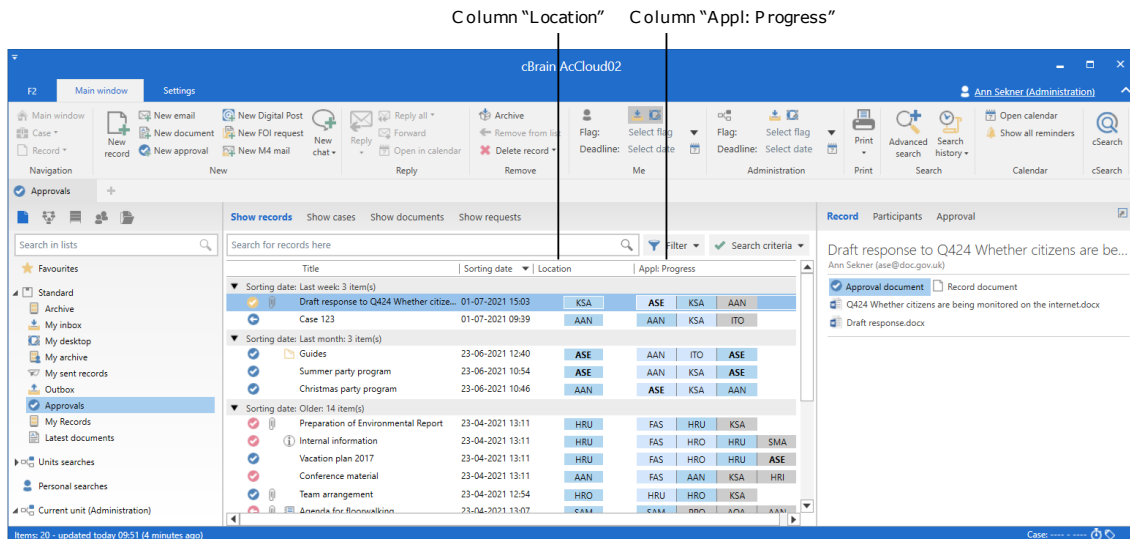
Figure 8: Column "Appl. Progress"

Step 6: The approval is processed on step 2 (Final approval)

- Department head Abigail Anderson receives the record with the approval in her inbox.

- Abigail goes to her inbox and double-clicks on the record "Draft response to Q424 Whether citizens are being monitored on the Internet".

- In the approval document on the record, Abigail reads that she must approve the attached draft response.

- Abigail reads the two Word documents (the question and the draft response) attached to the record.

- Abigail has an addition to the draft response. A reference to the response to Q424 is missing. Since it is only a matter of adding a few words, Abigail decides to edit the document. Abigail could instead have chosen to return the record to case manager Ann with a comment stating that she must make the necessary changes.

- In the document "Draft response", Abigail adds the words "as well as Q424". She saves the draft response and closes both documents.

- Abigail is now back in the record window. The "New version" dialogue opens. Abigail clicks on **Yes** to create a new version of the record.

- On the right side of the record, Abigail writes the following in the "Comment" field: "I have added a reference to the draft response document". She then clicks on the grey **save icon** on the right, above the comment field.

- Abigail then clicks on **Save** in the record ribbon and approves the draft response as the final approver by clicking on **Final approval**.
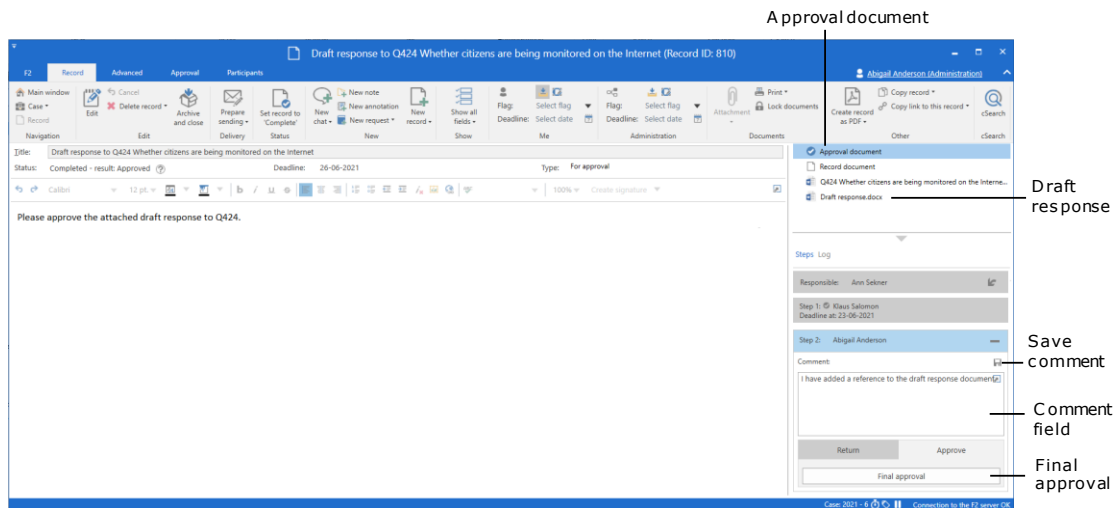
**Figure 9: Approval to be finally approved with comment**

Step 7: The approval is finally approved and completed

- The approval creator Ann receives the record with the final approval in her inbox.

- Ann hovers the cursor over the approval icon belonging to the record "Draft response to Q424 Whether citizens are being monitored on the Internet" and reads that the approval has been finally approved.

- Ann can also tell this by the approval icon belonging to the record. There is now a ribbon inside the icon's circle.

- The approval is completed.

The response to the question "Whether citizens are being monitored on the Internet" can now be forwarded to the minister for a response in the Parliament.

Since the approval has been finally approved, it is no longer visible in the "Approvals" list in the main window.

All completed approvals can be found using the search fields in the "Approval process" search group in the main window.

The approval flow
is completed

Text is displayed when hovering the
cursor over the approval icon
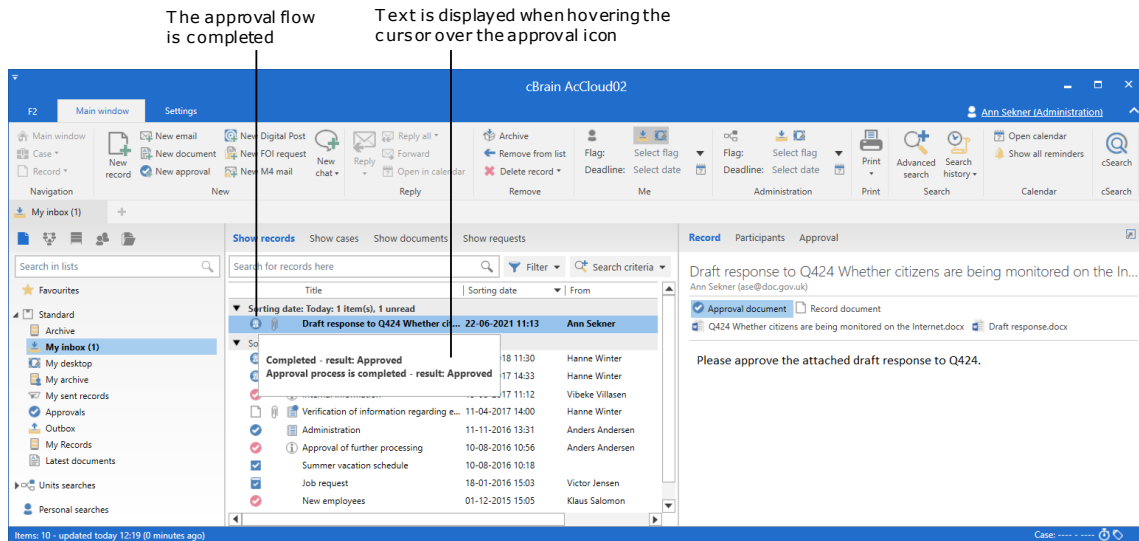
Figure 10: Approval completed

Step 8: Show document versions

- Ann would like to know if any changes were made to the document "Draft response" during the approval flow.

- From her inbox, Ann selects the record "Draft response to Q424 Whether citizens are being monitored on the Internet".

- Ann double-clicks on the record to open it.

- On the right side of the record, above the approval steps, Ann clicks on **Log**.

- Here Ann can see an overview of all the actions in the approval flow. She reads that the approver on step 2, Abigail Anderson, has written the comment: "I have added a reference to the draft response document".

- Ann would like to compare the original draft response to the finally approved response. She clicks on the **show document versions icon** 🕓 on the far right, above the log entries.

- Ann notices from the record preview that on step 2 of the approval the document "Draft response" is on version 2 of 2. This is the version Ann opens by double-clicking on the **document** in the record's preview.
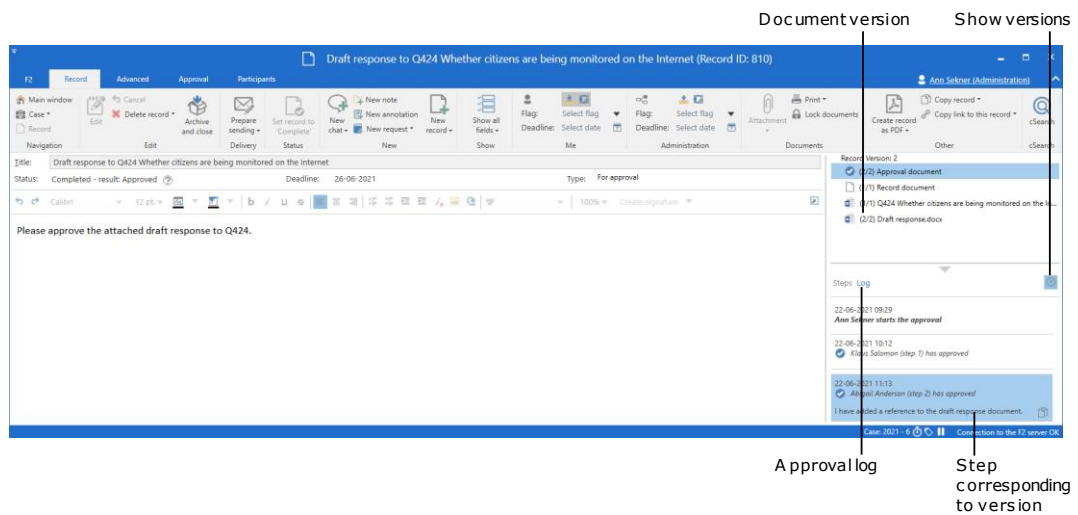
Figure 11: Show document versions

- Ann would also like to see the original version of the draft response, so she clicks on **Klaus Salomon (step 1) has approved** in the log.

- In the record preview, the document "Draft response" is now on version 1 of 2. Ann opens this version too.

- Ann has read both the original and the finally approved version of "Draft response" and has a full overview of the change that has been made in the approval flow.

- Ann closes both versions of the document and then the record.