cBRAIN

F2

Case template
editor

Version 7

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Reading guide

This manual is written for users of F2 Case template editor.

The manual contains a short introduction to F2 Case template editor 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 the F2 Case template editor

F2 case templates assist the user in labelling cases correctly during the case creation process. When creating a new case, the user may base it on a template. Case templates assist the user by pre-filling or locking certain case-specific fields (e.g. "File plan" or "Keyword") or making those fields mandatory for the user to fill in.

The add-on module F2 Case template editor allows users with the "Can edit case templates" privilege to create and maintain various case templates. These can be accessed by the organisation's users through the "New case" dialogue. For further information on case creation, see the *F2 Desktop – Cases* manual. F2 Case template editor requires the add-on module F2 Case templates in order to function.

The "Can edit case templates" privilege also lets the user create and edit installation references. Installation references are used to define elements with which the fields on a case template fields are filled.

The first part of this manual demonstrates how to use a case template to create a new case. The manual then addresses access restrictions on case templates, and finally it is shown how a user with the "Can edit case templates" privilege creates the case template itself as well as the required installation references.

Creating a case from a case template

Case templates are accessed through the "New case" dialogue. The figure below shows an example of how this dialogue might look. The default fields depend on the organisation's setup. For further information on creating a case, see *F2 Desktop – Cases*.

When a case template has been created in an organisation, it is accessible from the drop-down menu at the top of the "New case" dialogue. A case template may be associated with a specific unit and be invisible to users outside of this unit.
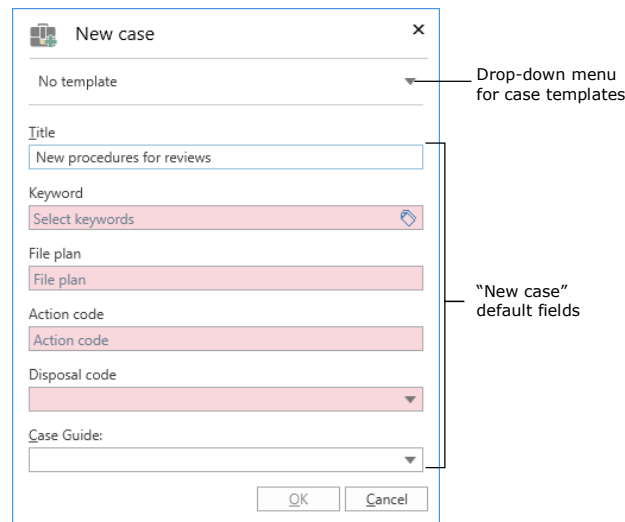

Figure 1: The "New case" dialogue

Click the **drop-down arrow** in the top right corner of the dialogue to open a list of available case templates. If a case template is intended for the user's unit specifically, its title is bolded and the name of the unit is added in brackets. See the figure below.
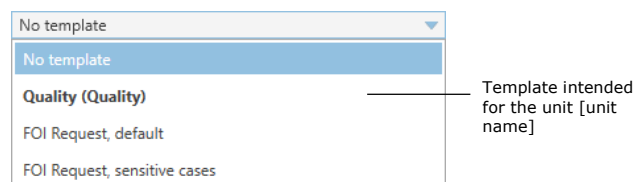

Figure 2: Drop-down menu for case templates

Click the desired **case template**. Similar to the default fields in the "New case" dialogue, some fields on the case template may be mandatory to fill in.

A field may also be pre-filled. This function is practical in e.g. the keywords field if a user often creates cases with a certain keyword or set of keywords.

A pre-filled field may be locked to prevent the case creator from editing its contents. This function may be used if the case being created from the case template must have a certain access restriction which should not be changed by the user. A locked field may also be hidden, which may be useful if its contents is irrelevant for the user during case creation.

The figure below shows a case template with a number of fields.

Figure 3: Example of case template

The fields on the case template example are discussed below.

> **Note**: The table below discusses the fields as they are configured in the case template example above. The case creator's options for each field depend on the configuration of the case template. For further information on how to set up a case template, see *Creating a case template*.

Field	Description
"Title"	Enter a title for the case. This field is always mandatory.
"File plan"	Enter a file plan. In the example above, the field is red because it is mandatory in this example. **Note**: On a case template, any access restriction will invalidate a file plan's security group. If a file plan with a security group is added to the "File plan" field, but the "Access restriction" field is also filled in, the file plan security group will be voided. For further information, see *Access restrictions on cases based on templates.*
"Action code"	Enter an action code. In the example above, the field is red because it is mandatory in this example.

Field	Description
"Disposal code"	Enter a disposal code. In the example above, the field is red because it is mandatory in this example. **Note**: This field is only visible if F2 is configured to display disposal codes. This configuration is made in cooperation with cBrain.
"Deadline"	Enter a deadline. In the example above, the field is optional and may remain empty.
"Keyword"	Enter one or more keywords. In the example above, the field is optional and may remain empty.
"Supplementary case manager"	Enter a supplementary case manager. In the example above, the field is pre-filled with the user Karin Simonsen. However, this field may be edited by the user. Another user may be added by either typing a name or clicking the participant register icon, ![icon].
"Responsible"	Enter a responsible user or unit. In the example above, this field is pre-filled with the "Quality Control" unit and cannot be edited by the user. This is indicated by the absence of the participant register icon, ![icon].

After the case template's mandatory fields and any optional fields have been filled in, click **OK** to create the case.

Access restrictions on cases based on templates

The "Access restriction" field on the case template determines two things: who is able to access a case template and who is able to access a case based on the template.

A case template with this field included and editable lets the user add an access restriction which will apply to the case as may be done when a case is created without a case template.

A case template with an "Access restriction" field that is pre-filled by a user with the "Can edit case templates" privilege can only be seen by users who are included in the specified access restriction. This may be e.g. a unit or a security group.

When a case based on a template containing an element in the "Access restriction" field (either added by the template's creator or a user during case creation), the contents of this field overwrites all other access restrictions that could affect case access. For example, if the case creator has chosen a "Security group for new cases" in the "Setup" on the "Settings" tab in the main window, this security group is overwritten by the access restriction specified on the case template.

> **Note**: If a case template includes an empty "Access restriction" field, the F2 automatically inserts the user's "Security group for new cases" if any is chosen.

The prioritisation of the case template's access restriction also applies when the case creator adds a file plan with an associated security group. If the template contains both an access restriction and a file plan with a security group, the content of the "Access restriction" field determines who is able to access the case. The file plan's security group is rendered invalid.

> **Note**: F2 favours the user's choice of security group for new cases over the security group of a file plan. For case templates with no pre-determined access restriction (but on which the field is present), the user's "Security group for new cases", if any, is added to the "Access restriction" field. The user's choice of security group then becomes the effective access restriction on the case, even a file plan with a security group is added during case creation. In this case, the file plan's security group is rendered invalid.

Creating a case template

Users with the "Can edit case templates" privilege are able to create and edit case templates. Click the **Case templates** menu item from the **Templates** menu group on the "Settings" tab in the main window.
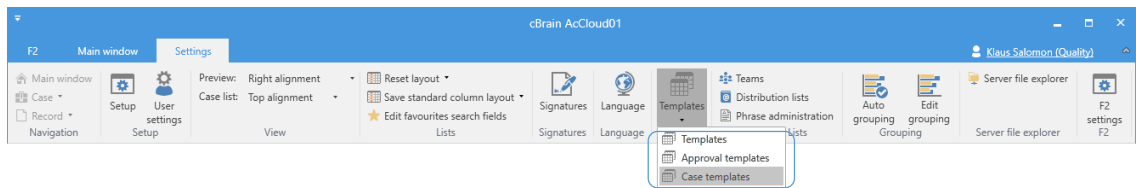

Figure 4: The "Templates" menu group

Click on **Case templates** to open the window shown on the figure below. From here it is possible to create and delete case templates and import or export them to and from F2. The window shows a list of existing case templates, which can be sorted by various columns. Below the column title is a field for filtering that makes it easier to search for a specific template.
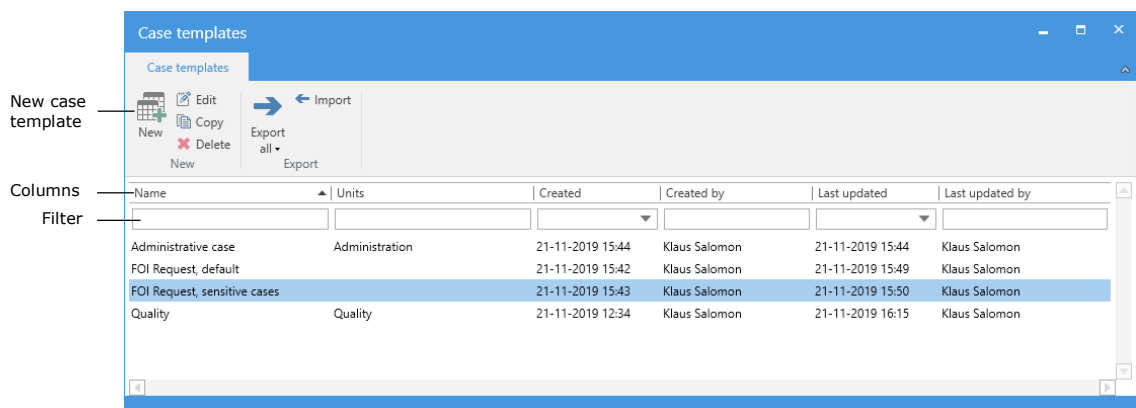

Figure 5: The "Case templates" window

New case template

Click on **New** in the ribbon to open the "New case template" dialogue shown on the figure below. In the "Template title" field, enter a title for the template. The title appears when the case template is accessed from the drop-down menu in the new case dialogue. For further information, see the section *Creating a case from a case template*. The field has a red background colour indicating that it is mandatory, since a title is required in order to save the template.

The figure also shows the "Attach to units" field. If empty, a case template generally becomes available to all users in the organisation, i.e. for all authorities. By adding units to the field, the creator determines who is able to see the template in the "New case" dialogue and to select it as a template for new cases. The field is described in further detail in the table below.

The figure also shows two examples of fields that may be included on a case template, "Access restriction" and "Access code".
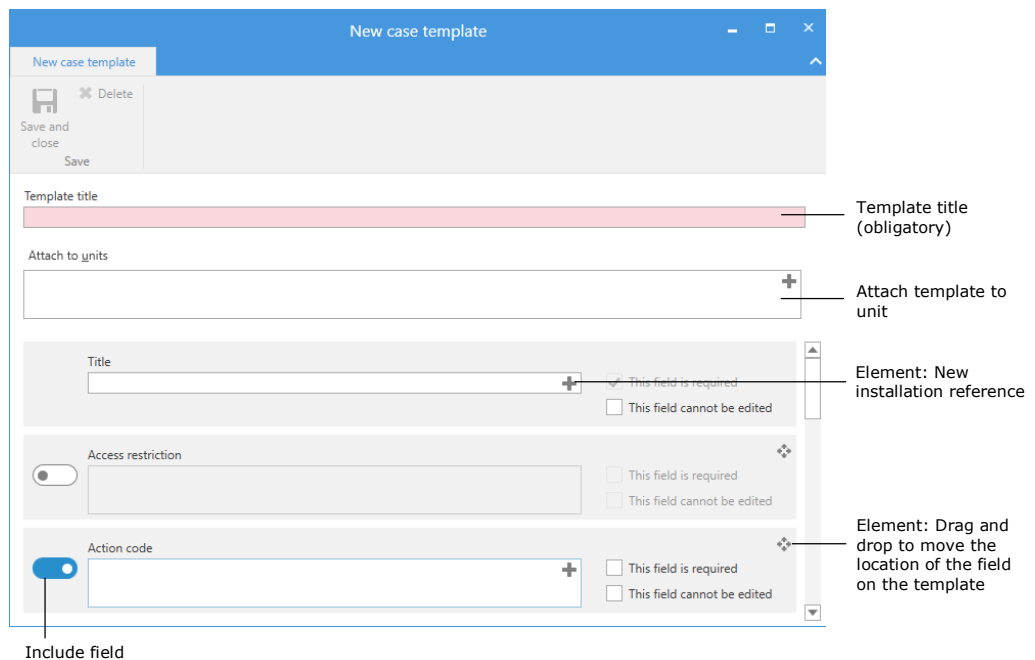
Figure 6: New case template

The creator can click the slider to the left of an optional to include it on the case template. If the slider is blue, the field is included.

To the right of each field are a number of elements that lets the user adjust it. These elements are described in the table below, followed by a description of the different fields.

Element	Description
➕	Create a new installation reference.
	A field included on the case template may be empty – and may then be filled in by the user during case creation – or it may contain one or more installation references. An installation reference may be considered a type of shortcut that helps establish the framework of a case.
	For further information, see the section *Adding an installation reference from the "New case template" dialogue*.
✛	Left-click on this symbol and hold down the mouse button to drag the corresponding field up or down on the case template. Release the mouse button to drop the field in the wanted location.

Element	Description
✓ This field is required	Check this box to make the field mandatory for a user to fill in when using the template to create a new case.
✓ This field cannot be edited	Check this box to add the field to the case template, but make it uneditable to users who create a case using the template. When this box is checked, the template creator must fill in the field during creation of the case template. Checking this box may be useful for creating a template for cases that must always have the same access restriction.
✓ This field cannot be edited ✓ Hide this field	A field that cannot be edited can also be hidden for the users who will be using the case template. Check this box to hide the field so it cannot be seen on the template.

The table below describes the fields which can be included on a case template. For each field that is included, the template creator must choose whether the field is mandatory to fill in when using the template and whether the field may be edited by the case creator.

Field	Description
"Title"	The "Title" field is mandatory. Enter a title for the template which is shown in the "New case" dialogue.
"Attach to units"	If this field is empty, all of the organisation's users will generally be able to see and use the case template. If a unit is attached to a case template, it is only visible to the unit's users as well as users in any subunits. All of these users will see the parent unit's name listed after the title of the case template. The case template's title is presented in bold for users with a a job role in the unit to which the case template is directly attached. **Note**: If a template must be attached to a unit, but not its subunits, it is possible to add an access restriction during template creation.

Field	Description
"Access restriction"	Lets the template creator to set an access restriction on the template. If the field is open for editing on the finished template, the case creator is able to set an access restriction for the case.
	The template creator can limit access to the template by adding to this field an installation reference that e.g. refers to a unit. This ensures that only users in this specific unit can see and access the case template, while it remains invisible to users in subunits.
	When creating a case using a case template, an access restriction on the template will overwrite any other access restriction or security group which the case creator may have set up in their personal settings or in connection with a file plan.
	For further information, see the section *Access restrictions on cases based on templates*.
"Action code"	Lets the template or case creator add an action code to the case. Action codes are used when labelling a case, e.g. as further categorisation of a file plan or as tags. Action codes are managed in a value list by a user with the "Value list administrator" privilege. For further information on value lists, see *F2 Desktop – Administrator*.
	Note: This field is only visible if F2 is configured to show action codes. This configuration is done in cooperation with cBrain.
"Case participants"	Lets the template or case creator add case participants.
"Deadline"	Lets the template or case creator add a deadline to the case.
"Disposal code"	Lets the template or case creator add a disposal code to the case.
"File plan"	Lets the template or case creator add a file plan to the case.
	Note: This field is only visible if F2 is configured to show file plans. This configuration is done in cooperation with cBrain.

Field	Description
	Note: A file plan's security group will be overwritten by any access restriction on the case template or by the case creator's choice of "Security group for new cases" in "Setup" on the "Settings" tab in the main window, if any. For further information, see the section *Access restrictions on cases based on templates*.
"Keyword"	Lets the template editor or case creator add keywords to the case.
"Progress code"	Lets the template editor or case creator add a progress code to the case. **Note**: This field is only visible if the F2 Progress codes add-on module is installed.
"Responsible"	Lets the template creator or case creator add e.g. a user or unit that is responsible for the case.
"Supplementary case managers"	Lets the template creator or case creator add a supplementary case manager.
"Case guide"	Lets the template creator or case creator add a case guide. **Note**: This field is only visible if the F2 Case guides add-on module is installed.

Click **Save and close** in the ribbon when the template is done. The template is then available in the drop-down menu in the "New case" dialogue.
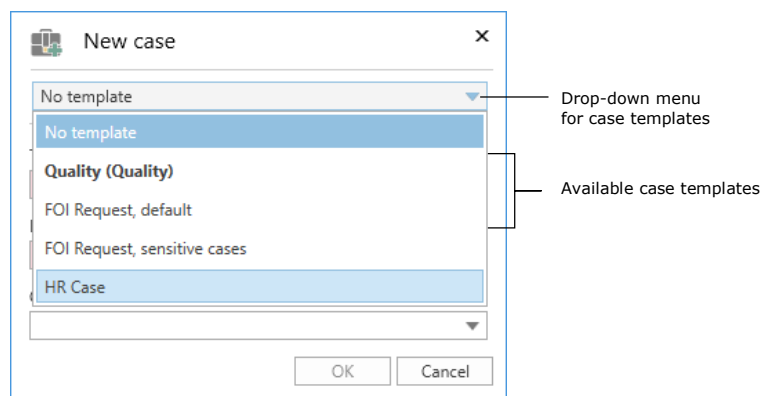

Figure 7: The "New case" dialogue

Adding an installation reference from the "New case template" dialogue

Case templates fields can be pre-filled using installation references. When a user starts typing in a field, F2 automatically suggests relevant installation references.

When an installation reference is added to a field, click the **down arrow** next to it to open a context menu. From here it is possible to copy, cut, paste, or remove the installation reference.
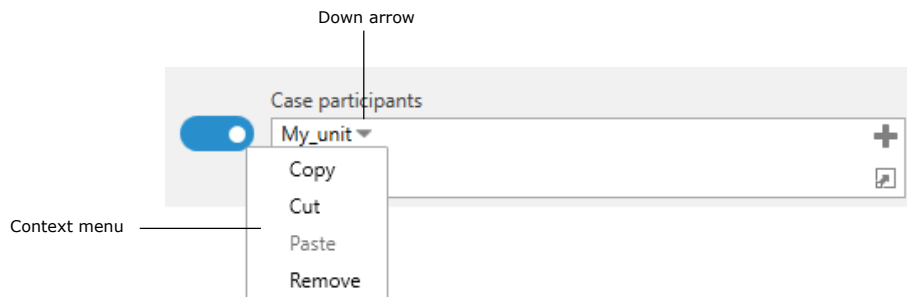

Figure 8: Context menu for installation reference

If an installation reference is not in the system, it may be created by clicking the ✚ icon in the top right corner of the relevant field.
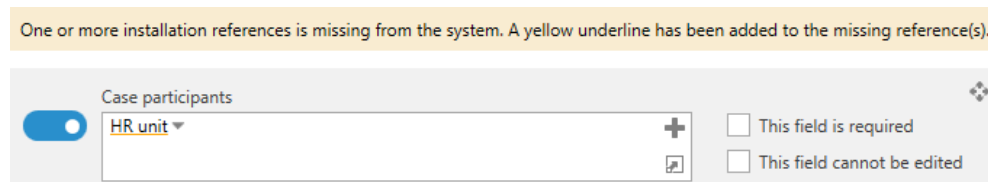
Figure 9: Error message for missing installation references

This opens the "New installation reference" dialogue, which is identical to the dialogue that can be accessed from the "Installation references" menu item on the "Administrator" tab. For further information on installation references, see the section *Creating an installation reference*.

Installation references

Installation references are used when creating a new case template. They serve as shortcuts that help establish the framework of a case.

Example: An organisation's HR department creates ten case templates. Cases made with them are the responsibility of HR employee Marjorie Merigold. The organisation could just add Marjorie's name in the "Responsible" field on each template, but if the case responsibility is later transferred to Marjorie's colleague, Peter Periwinkle, the organisation must replace the content of each template's "Responsible" field. A more effective approach is to create an installation reference of the "User" type with a title such as "HR responsible user" to which Marjorie is added from F2's participant register. This installation reference can then be added to the "Responsible" field on the case templates. If the responsibility for the cases is reallocated to Peter at a later time, Marjorie's name need only be replaced by Peter's in the installation reference. Each case template with this installation reference will then list Peter Periwinkle's name in the "Responsible" field.

> **Note**: In the example above, Marjorie Merigold is still listed in the "Responsible" field on cases created before her name was replaced by Peter Periwinkle's in the installation reference.

An installation reference consists of two elements, "Reference" and "Type". "Reference" is the title of the installation reference and should be descriptive enough that the installation reference may be used in other contexts. "Type" determines the fields in which the installation reference may be used.

In the example below, a user is creating an installation reference with the title "Deadline_14_days". The "Type" is set to "Deadline". Next to this field the wanted number of days is entered, and the user then clicks **Create**. For further information on this, see the section *Creating an installation reference*.
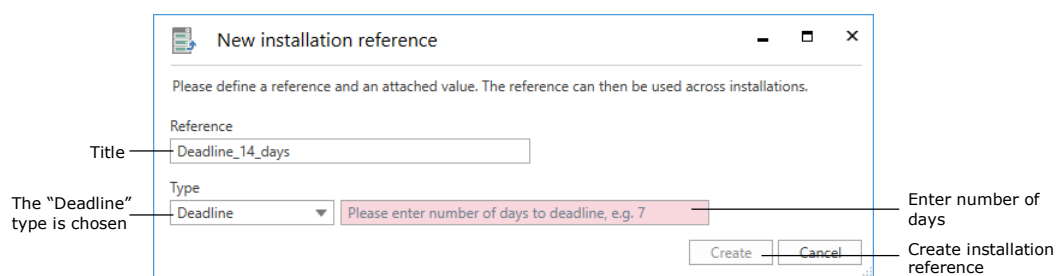

Figure 10: Creating an installation reference

The "Installation references" menu item

The **Installation references** menu item is accessible from the "Administrator" tab for users with the "Can edit case templates" privilege. In this dialogue, click **New** to create a new installation reference. Existing installation references can be edited, deleted or exported, and new ones can be imported. An installation reference can also be created from the "Case template" dialogue during the creation of a case template. These options are described below.
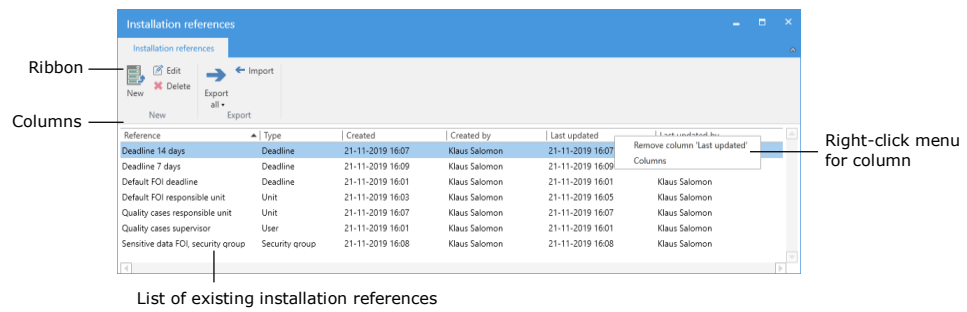
Figure 11: The "Installation references" dialogue
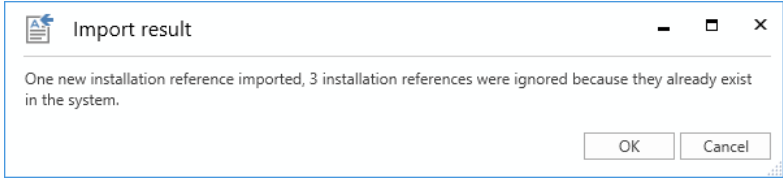
The table below describes the menu items in the ribbon.

Menu item	Description
"New"	Opens the "New installation reference" dialogue. For further information, see the section *Creating an installation reference*.
"Edit"	Opens the "Update installation reference" dialogue for the selected installation reference. From here it is possible to edit its title as well as its selected value, but its type cannot be changed. For example, an installation reference of the "Deadline" type can have its value changed from 14 to 10 days, and its title can be changed from "Deadline_14_days" to "Deadline_10_days", but its type cannot be changed from "Deadline" to e.g. "Keyword".
"Delete"	Deletes the selected installation reference. F2 asks for confirmation from the user this action is performed.
"Export all"/"Export chosen"	Exports all/selected installation references to a config file. This file can then be imported to other F2 installations which can also make use of the installation references.
"Import"	Imports installation references from a config file. When the import is completed, F2 shows a list of any updates. The user has the option of cancelling the import before the updates are applied. **Figure 12: Message when importing installation references**

The list of existing installation references can be sorted by clicking on a column. Right-click on a column to remove it. To view the column again, right-click on any column and then select **Columns** from the right-click menu. This opens the "Select columns" dialogue in which columns can be added or removed.
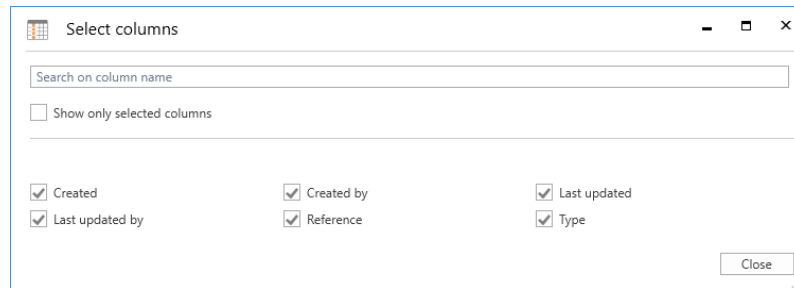
Figure 13: The "Select columns" dialogue

The table below describes each column.

Column	Description
"Reference"	The title of the installation reference.
"Type"	The type of the installation reference. For more information, see the section *Creating an installation reference*.
"Created"	Displays the time and date of creation.
"Created by"	Displays the name of the user who created the installation reference.
"Last updated"	Displays the time and date when the installation reference was last edited.
"Last updated by"	Displays the name of the user who last edited the installation reference.

Creating an installation reference

An installation reference can be created in two ways:

- From the "Installation reference" menu item on the "Administrator" ribbon.

- From a field on a case template in the "New case template" dialogue. This dialogue is accessed from the "Case templates" menu item on the "Settings" ribbon.

In both cases, the user is presented with the "New installation reference" dialogue in which the "Reference" and "Type" fields must be filled. The user must then click **Create**. There are certain differences between the two creation methods. Both are described in the following sections.

The installation reference type depends on the case field for which it is intended. For example, the "Responsible" field only accepts participant types, and the "Keyword" fields only accepts keyword that have been created in the organisation. The possible types of installation references for each of the case template fields are listed in the table below.

Case template field	Possible types	Description
"Title"	Title.	Lets the template creator enter text which is shown in the "Title" field of the template when a new case is created.
"Access restriction"	Me, my unit, user, unit, team, security group, attached units.	Select the wanted type from a drop-down menu. "Me" and "My unit" are dynamic and refer to the case creator and their unit, while a specific user, unit, team or security group can be added via the participant register.
"Action code"	Action.	An action code from an existing value list is selected from a drop-down menu. For further information on value lists, see *F2 Desktop – Administrator*.

Case template field	Possible types	Description
		Note: In "Value list administration", the field "Abbreviation" must be filled in for each action code and it must be marked as "Active" in order to use it as an installation reference.
"Case participants"	Me, my unit, user, unit, distribution list, external participant, attached units.	Select the wanted type from a drop-down menu. "Me" and "My unit" are dynamic and refer to the case creator and their unit, while a specific user, unit, distribution list or external participant can be added via the participant register.
"Deadline"	Deadline (Numeric value).	When selecting this type, a field appears in which a numeric value, representing days until deadline, can be entered.
"Disposal code"	Disposal code.	If F2 is configured to show disposal codes, an existing disposal code can be selected from a drop-down menu. **Note**: Disposal codes are configured in cooperation with cBrain.
"File plan"	File plan.	A file plan from an existing value list is selected from a drop-down menu. For further information on value lists, see *F2 Desktop – Administrator*.
"Keyword"	Keyword.	An existing keyword is selected from a drop-down menu. For further information on keywords, see *F2 Desktop – Administrator*.

Case template field	Possible types	Description
"Progress code"	Progress code.	An existing progress code is selected from a drop-down menu. Requires the F2 Progress codes add-on module. For further information, see *F2 Progress codes – user manual*. **Note**: A progress code must be checked as "Active" in the "Progress codes" dialogue before it can be used as an installation reference.
"Responsible"	Me, my unit, user, unit, attached units.	Select the wanted type from a drop-down menu. "Me" and "My unit" are dynamic and refer to the case creator and their unit, while a specific user, unit, team or distribution list can be added via the participant register.
"Supplementary case managers"	Me, my unit, user, unit, team, distribution list, attached units.	Select the wanted type from a drop-down menu. "Me" and "My unit" are dynamic and refer to the case creator and their unit, while a specific user, unit, team or distribution list can be added via the participant register.
"Case guide"	Case guide.	An existing case guide is selected from a drop-down menu. Case guides are configured in cooperation with cBrain.

Creating an installation reference from "Installation references"

Go to the "Administrator" tab and click the **Installation references** menu item.
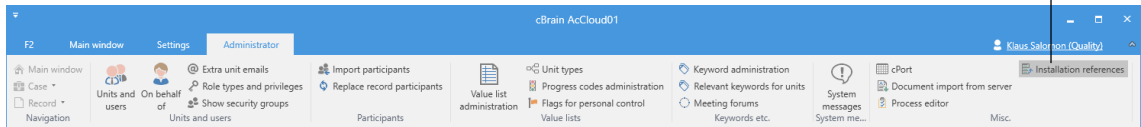
Figure 14: The "Installation references" menu item

This opens the dialogue below. Click **New** in the ribbon to open the "New installation reference" dialogue.
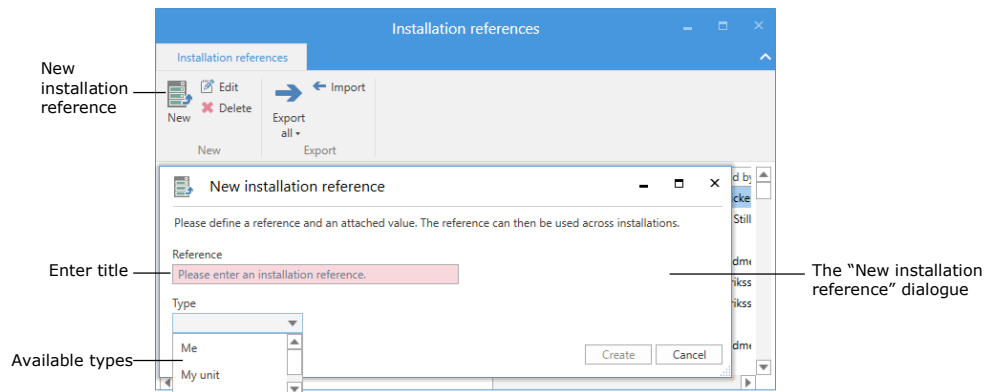
Figure 15: "New installation reference" opened from "Installation references"

Enter a title in the "Reference" field, then select a type in the drop-down menu. If the type needs further specification, another field appears next to the "Type" field. In the example below, the "User" type has been selected, and a field in which a user can be added appears. From this field it is also possible to search for a specific user in the participant register, which is opened by clicking the 👥 icon.
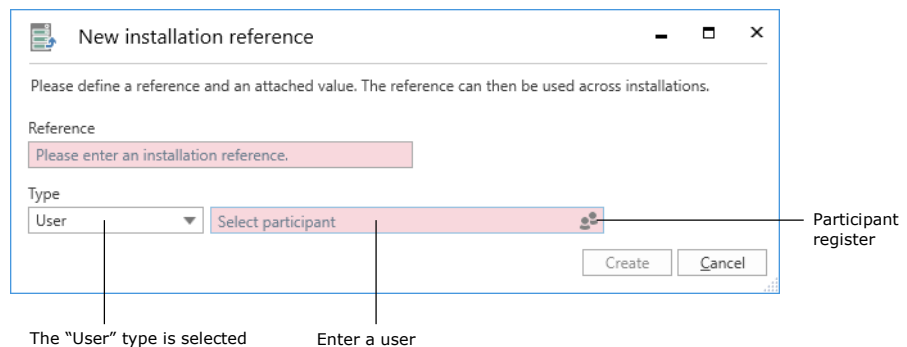
Figure 16: Field for specifying the installation reference's type

When a reference title and a type have been selected, click **Create**. The installation reference appears on the list in the "Installation references" dialogue and is ready for use.

When more than one installation reference is needed, it is practical to create them using this method. The list in the dialogue provides the creator with an overview of all existing installation references.

Figure 17: A list of installation references

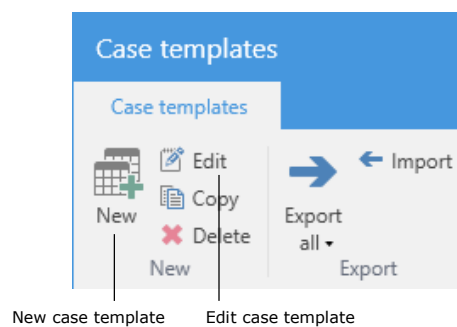# Creating an installation reference from "Case templates"

Go to the "Settings" tab and click the **Case templates** menu item to open the "Case templates" dialogue.
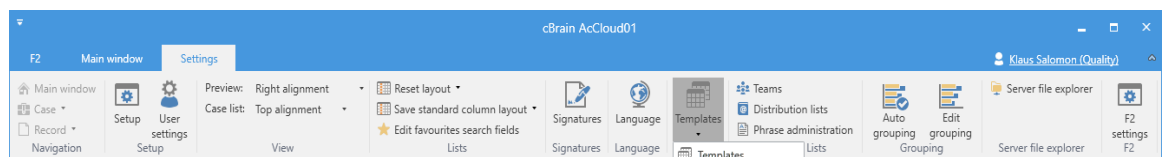
The "Case templates" menu item

Figure 18: The "Case templates" menu item

To open the case template window, click **New** or **Edit** in the ribbon while an existing case template is selected.

New case template   Edit case template

Figure 19: The ribbon in "Case templates"

In "New case template", select a field and click on the ✚ icon in it to open the "New installation reference" dialogue.

Name of field   Create installation reference

Figure 20: The "Action code" field in "New case template"

When the dialogue is accessed this way, only installation references of types that comply with the chosen field may be created. On the figure below the dialogue is opened from the "Action code" field, so the type is automatically set to "Action code" and cannot be changed.
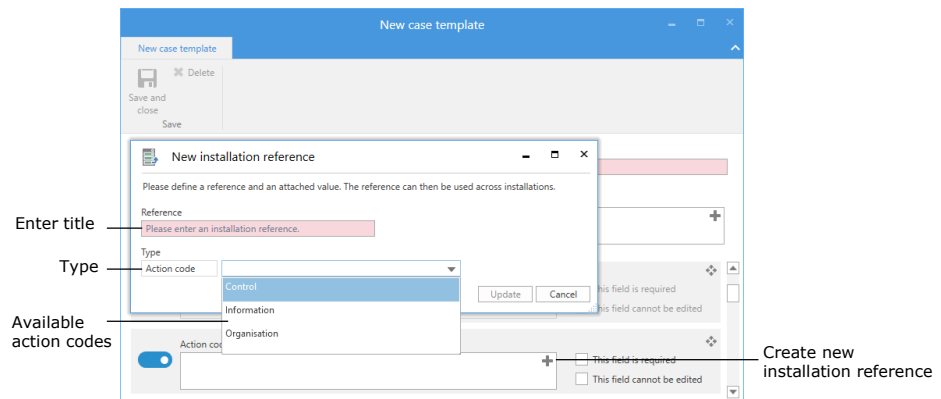

Figure 21: New installation reference in the "New case template" dialogue

After "Reference" and "Type" are chosen, click **Create**. The newly created installation reference is then added to the field on the case template. It can also be found on the list of installation references in the "Installation references" dialogue.

Figure 22: An installation reference added to a field on a case template

List of figures