F2 Desktop

Management and organisation

Version 7

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Welcome to cBrain F2

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

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

Reading instructions

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

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

1. The main window
2. Searches
3. Settings and setup
4. Records and communication
5. Cases
6. Management and organisation

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

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

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

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

Additional documentation for F2 Desktop

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

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

F2 add-on modules

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

Examples of cBrain's add-on modules include:

- F2 Merge codes, which enables the merging data from F2 to templates. The module enhances document quality through the use of merge fields utilising metadata and information from the participant register.
- F2 Approvals, which facilitates the handling of simple and complex approval processes. The module helps supports ensure quality assurance of ongoing work.
- F2 Manager, which enhances the mobility of executives by offering online and offline access to meeting material and approvals on iPad.
- F2 Touch, which is a web-based version of F2. The module is accessed through a web browser or as an app for mobile devices.

Please contact cBrain for further information.

We hope you enjoy using F2.

Management and organisation

This manual describes the possibilities for managing and organising work in F2 by e.g. using deadlines, flags and reminders.

In F2, each user may organise his/her work through personal management as well as unit-level management. Using the management functions in F2, the user can categorise records and create a useable overview of e.g. search lists. These functions include the possibility to set deadlines for the unit's casework and to decide which records should be displayed in the search lists "My inbox" and "My desktop".

Part of managing and organising work tasks is done with add-on modules such as requests and approvals. For more information on these, see the respective user manuals, *F2 Requests – User manual* and *F2 Approvals – User manual*.

The following section discusses how to manage and organise work using the main window ribbon, but the functions can be found in the record window ribbon as well.

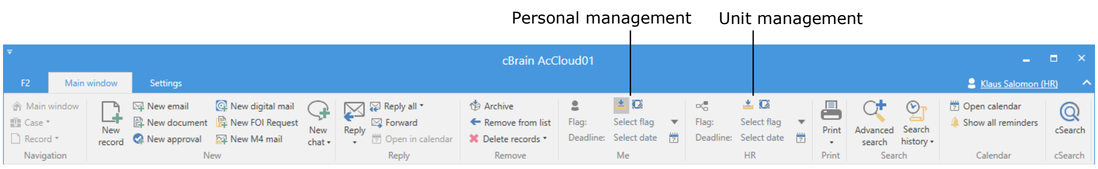


Figure 1: The menu items for personal and unit management in the main window

Personal management

The "Personal management" menu group is located in the ribbon of both the record and main windows when a record is opened or selected in the result list. The personal management values are only visible to the individual user.

The figure below shows the two buttons with which the user can choose to display a record in the inbox and on the desktop. In the middle of this menu group, the record can be flagged, and by using the bottom button the record can be given a deadline.

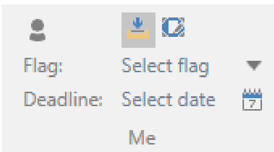


Figure 2: Personal management

Using the personal management function, the user can manage and organise his/her work on the record. The record can be placed as follows:

Icon	Description
	Indicates that the record is located in the user's inbox.
	Indicates that the record is located on the user's desktop.

Icon	Description
	Indicate that the record is located in both the user's inbox and on the user's desktop. **Note**: The record is the same regardless of the list from which it is opened.
	When these icons are not highlighted (compare to the darker outline of the above), the record is shown neither in the user's inbox nor on the user's desktop. However, the record will always be retrievable from the "Archive", "My Archive" or another search in which the record matches the search criteria.

The record may also be assigned a personal management flag, which is only visible to the user. The assignable flags are defined by a user with the "Flag administrator" privilege and may vary between installations. The flag value is used in e.g. personal searches. Read more about this in the manual *F2 Desktop – Searches*.

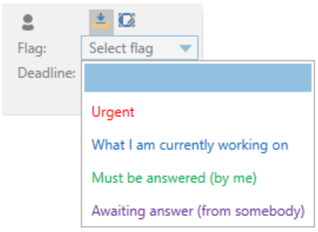


Figure 3: Assigning a personal flag

In addition, a user can also set a personal deadline for his/her work on the record, which is also only visible to the user. The deadline is entered directly in the field or by clicking the **calendar icon** and then choosing a deadline, as shown below.

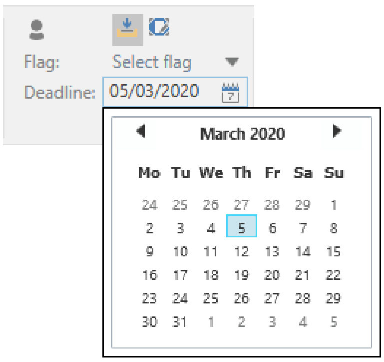


Figure 4: Assigning a personal deadline

Unit management

The unit management function is a collaborative tool. It allows the user to involve the unit in several ways and can also be used to create a general overview of tasks and processes for unit members.

Deadlines, flags and the ability to determine whether records are displayed in the unit’s inbox or on the unit’s desktop help categorise records, thereby creating a general overview and sharing knowledge.

Users in the unit can manage and organise the appearance of the record in the unit’s lists, that is, “Inbox (unit name)”, “Desktop (unit name)”, and "Archive (unit name)". This can be done using the “Unit management” menu group on the ribbon in either the record window or the main window.

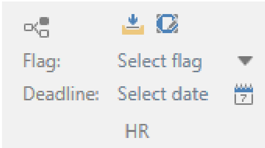


Figure 5: Unit management

The procedure is identical to that of personal management:

Icon	Description
	Indicates that the record is located in the unit’s inbox.
	Indicates that the record is located on the unit’s desktop.
	Indicate that the record is located in both the unit’s inbox and on the unit’s desktop. **Note**: Regardless of the list from which it is opened, the record is the same.
	When these icons are not highlighted (compare to the darker outline of the above), the record is neither shown in the unit’s inbox nor on the unit’s desktop. However, the record will always be retrievable from the “Archive”, “My Archive” or another search in which the record matches the search criteria.

The users in the unit may also assign a unit management flag, which is only visible to the unit. The assignable flags are defined by an F2 administrator and may vary from installation to installation. The unit may use the flag value in searches, for example. Read more about this in the manual *F2 Desktop – Searches*.

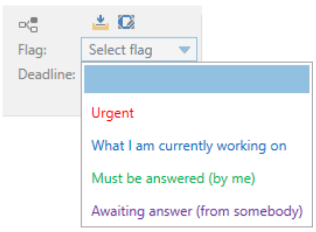


Figure 6: Assigning a unit flag

In addition, the users in the unit may also determine a unit deadline for their work on the record, which is only visible to the unit. The deadline is entered directly in the field or by clicking the **calendar icon** and then choosing a deadline, as shown below.

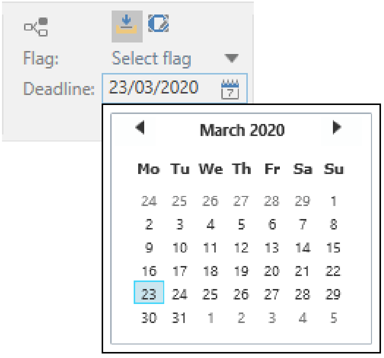


Figure 7: Assigning a unit deadline

Archiving, deleting and removing records

Using the "Remove" menu group it is possible to archive, delete, and remove records from specific lists. The "Remove" menu group is located in the main window ribbon.

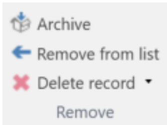


Figure 8: The "Remove" menu group

These functions are described in the following sections.

Archive

Click on **Archive** to archive the record(s) selected in the result list. F2 helps the user clean up when a record is archived. This means that the record is automatically removed from "My inbox" and "My desktop".

Furthermore, the record's status can be changed from "In process" to "Complete" if the user is responsible for the record. In other words, F2 helps the user by updating the "Status" metadata field.

When a record is archived, the following dialogue opens.

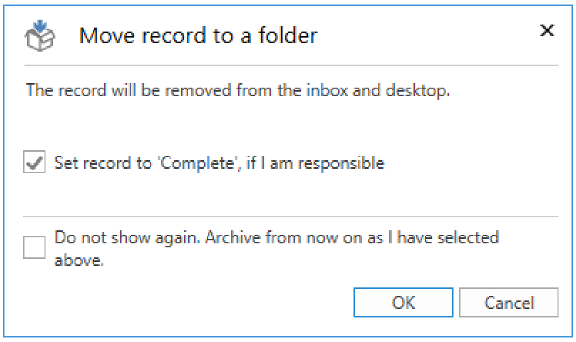


Figure 9: The "Move record to a folder" dialogue

Remove from list

The "Remove from list" function is used to remove records from the list that is currently displayed in the main window. This function is available for the following lists and search lists created from these lists:

- My inbox
- My desktop
- The unit's inbox
- The unit's desktop.

If a record is removed from a list, it can still be found on other lists on which it has been placed. The record will still be located in the "Archive", "My archive" and on any search lists created from these.

Delete record

The "Delete record" menu item works in one of two ways depending on whether the record is shared. Users with the "Can delete shared records for everyone" privilege also have the option of selecting "Delete for everyone" in a drop-down menu.

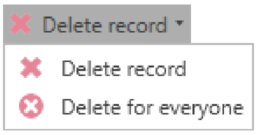


Figure 10: The "Delete record" drop-down menu.

Read more about deleting records in *F2 Desktop – Records and communication*.

The unit line related to case processing

When a record is sent to one or more users/and or units using the "Send" function, it is possible for the sender to follow the recipient's handling of the record.

If the sender wishes to follow the record's progress he/she can tick the field "Unit line related to case processing" located on the "Advanced" tab in the record window.

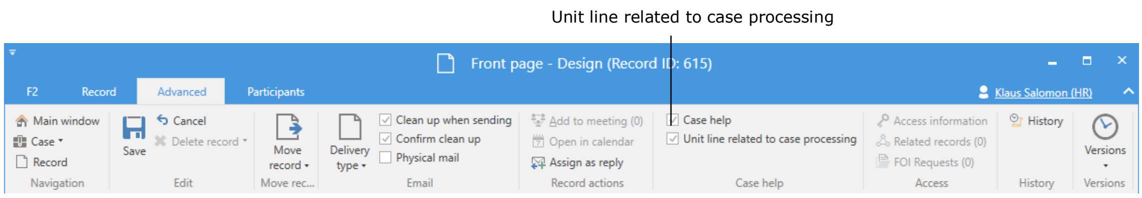


Figure 11: Menu item "Unit line related to case processing"

This creates a new field on the record called "Unit casework".

The "Unit casework" is for used for formal inquires to which a reply is needed, e.g. when a record has to be sent to a legal department for consultation.

Figure 12: The unit line related to casework

A deadline and a responsible user for the receiving unit's case management can be assigned using the unit line. The formal responsibility for the record remains with the sender; however, with the feature "Unit casework", the recipient may delegate the responsibility for the record to another user within the same unit.

Management information on the recipient unit's casework is shared with all users who have access to the record. This allows the sender to keep track of the recipient's work and for example see:

- Whether the receiving unit and the receiving unit's responsible user for the record have seen it.
- Whether the responsibility for a record has been delegated to a certain user.
- The status of the record.
- Whether the receiving unit has assigned an internal deadline to the record.

If needed, a recipient of an email without the unit casework line can add the line him/herself. This is done by clicking on **Show all fields** in the record window's ribbon, selecting **Extended** and then clicking on the link **Unit casework** in the bottom left-hand corner as shown below.

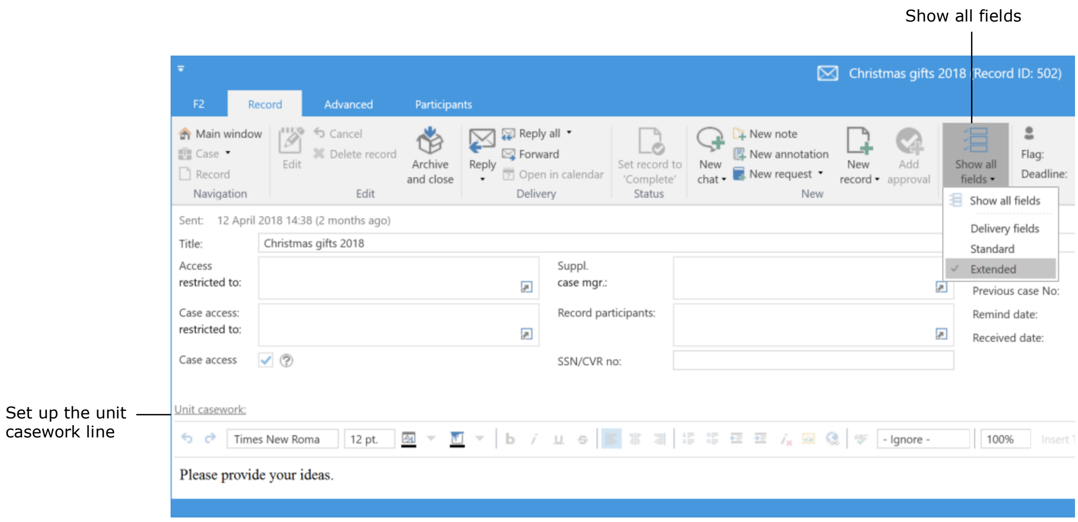


Figure 13: Set up the unit casework line on a received email

This makes the line for the unit casework appear, as illustrated below.

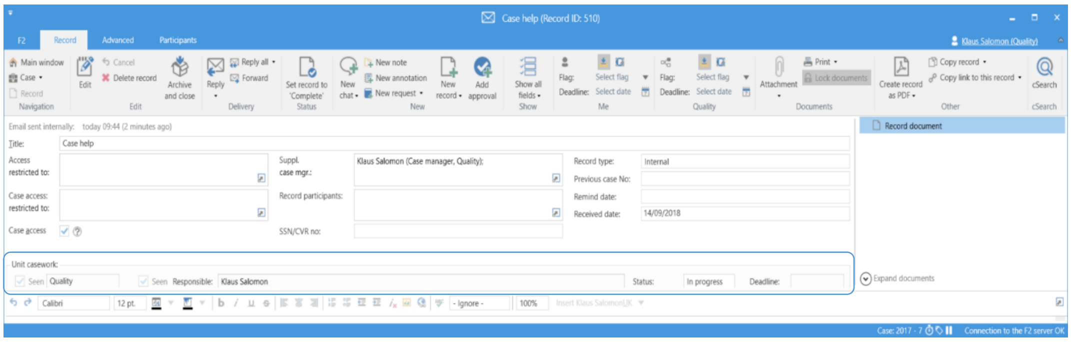


Figure 14: Recipient unit's case management

A "Unit casework" line will be created for each recipient unit if a record is sent to several internal users and/or units.

The "Seen" and "Responsible" fields in the unit casework line

The "Seen" field next to the "Responsible" field indicates whether the responsible user has seen the record. Even though a record has been sent to a user in a unit, the unit is only displayed until a user has actively seen the record. This is because all users in the unit can see the record and it may be a different user than the intended recipient who processes the record.

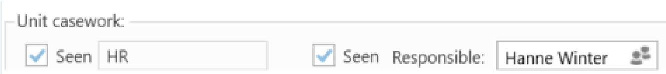


Figure 15: The "Seen" and "Responsible" fields

When a user opens the record and clicks on **Edit,** e.g. to add his/her own deadline (see below), F2 automatically ticks the "Seen" field and designates that user as "Responsible".

This way, the sender can always see on the record whether it has been received by the unit and whether it is the user to whom the record was sent who processes the record or another user in the unit.

A recipient, however, can open the record to view it and untick the "Seen" field in case he/she does not have time to act on it.

Using the "Responsible" field, the responsibility for the record can be allocated to a user in the unit. It is not possible to allocate the responsibility for the record to a user outside the unit. When a user is specified in the "Responsible" field, the record is placed in the inbox of that user, who is then notified of the allocation of responsibility.

The "Status" field in the unit casework line

The recipient puts his/her own status in the status field, which informs the sender whether work on the record is "Completed" or still "In progress". Thus, the sender of the record may follow its status and its progress.

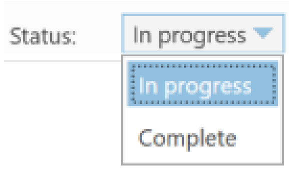


Figure 16: The "Status" field in the unit casework line

The "Deadline" field in the unit casework line

The recipient may add his/her own deadline, which shows the sender when something needs to be done on the record. In this way, the sender may keep track of the recipient's internal deadlines for when he/she will work on the record.

Add a deadline to the record by clicking or by entering the date in the "Deadline" field.

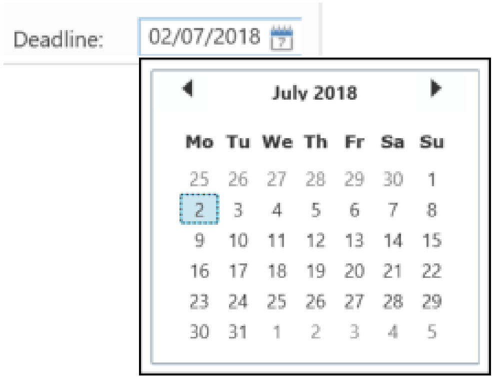


Figure 17: The "Deadline" field in the unit casework line

The deadline may also be designated by a set number of days from today's date, e.g. +10 (i.e. 10 days from today), in which case F2 automatically fills in the date when the user leaves the field.

Teams

In F2, a team is a collection of users from the same authority. Team members do not have to belong to the same unit. Teams can be useful in different contexts in F2:

- As an access group in the field "Access restricted to" on both records and cases.
- As a supplementary case manager on a record or a case.
- As an email recipient (can be configured).
- As a participant or interested participant at ad hoc meetings (add-on module).

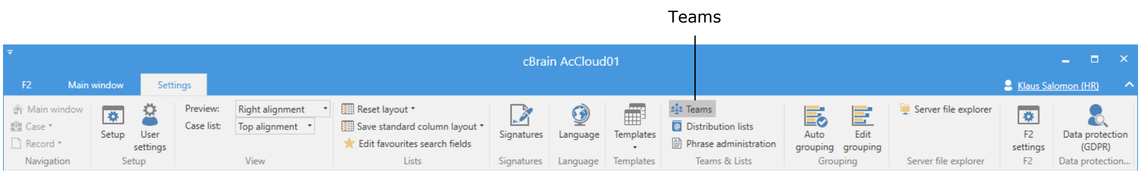


Figure 18: Teams under the tab "Settings"

Teams are created and maintained by clicking on **Teams** on the "Settings" tab in the main window. Users that have been assigned the "Team creator" privilege can create teams.

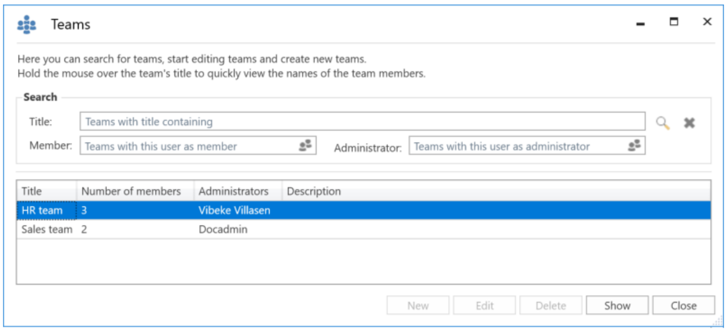


Figure 19: The dialogue listing the teams of the organisation

When creating a team, the organisation may designate one or more team administrators to maintain the team.

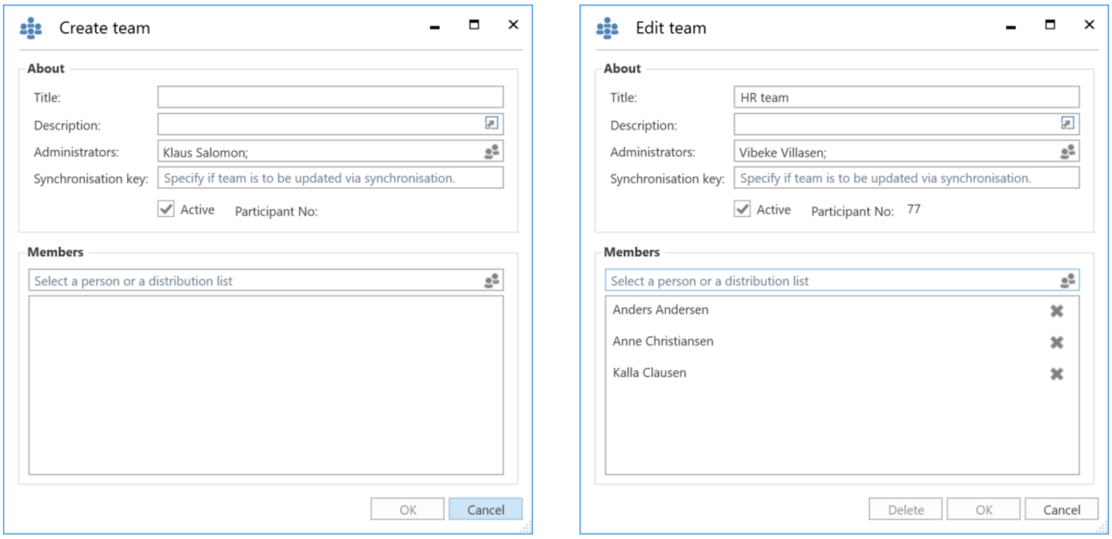


Figure 20: The dialogue for creating and editing a team

Any user may search for teams in the dialogue window, but only users with the "Team creator" privilege may create and edit teams. Read more about this in *F2 Desktop – Administrator*.

Reminders

Reminders fall under the category of personal management and offer the user the option of pop-up reminders on due dates.

Reminders are set up by right clicking on a record in the main window. In the context menu, select **Reminder** and then **Add Reminder** as displayed below.

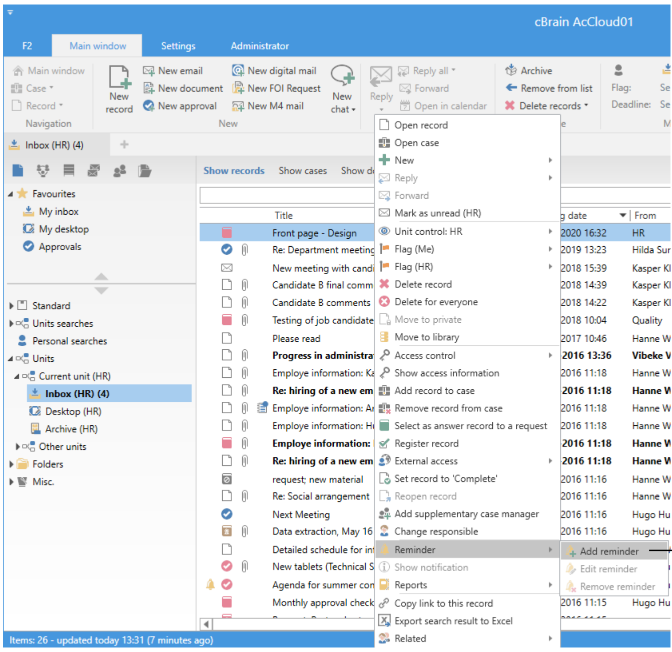


Figure 21: Add reminder

The users then set up the reminder in the dialogue window that opens. Add date and time, and if need be, a description. Then click **OK**.

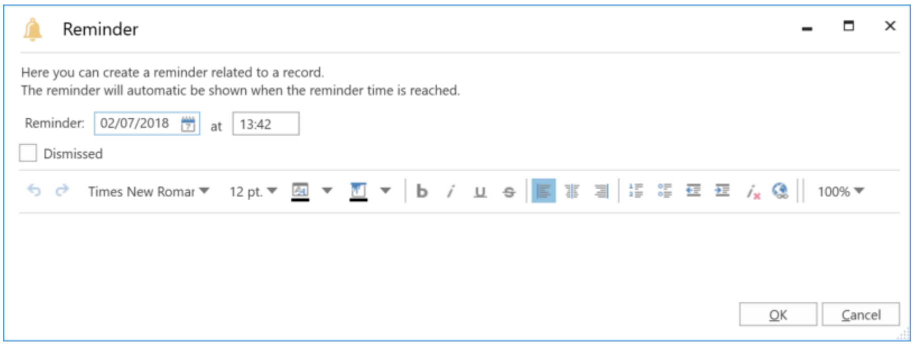


Figure 22: Create a reminder

The reminder is created and added to the record. Thus, a reminder is always associated with a record. A record with a reminder is given a reminder icon in the result list.

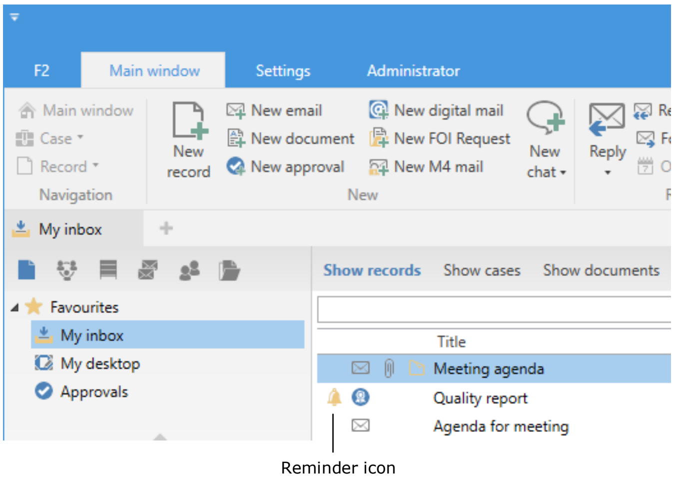


Figure 23: Reminder icon in the result list

When a reminder has been created, it may be either edited or removed by right clicking on its record. In the context menu, click **Edit reminder** or **Remove reminder**.

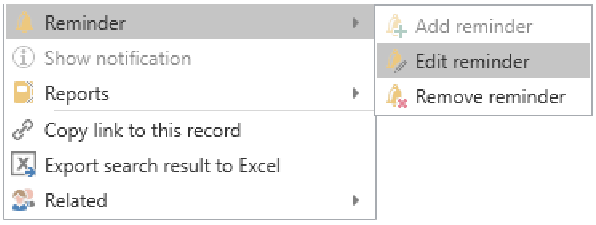


Figure 24: Edit or remove a reminder

At the time the user has selected, the "Reminders" dialogue appears on the screen. The dialogue appears even if the F2 window is not active. For further information on this dialogue, see the section *The "Reminders" dialogue* below.

By clicking **Show all reminders** in the top bar of the main window's ribbon, all the relevant user reminders are shown in the dialogue window "Reminders". The section below describes the individual features of this dialogue box.

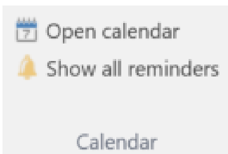


Figure 25: "Show all reminders"

The "Reminders" dialogue

This dialogue is shown when a reminder is due or when the user clicks on "Show all reminders" in the main window ribbon.

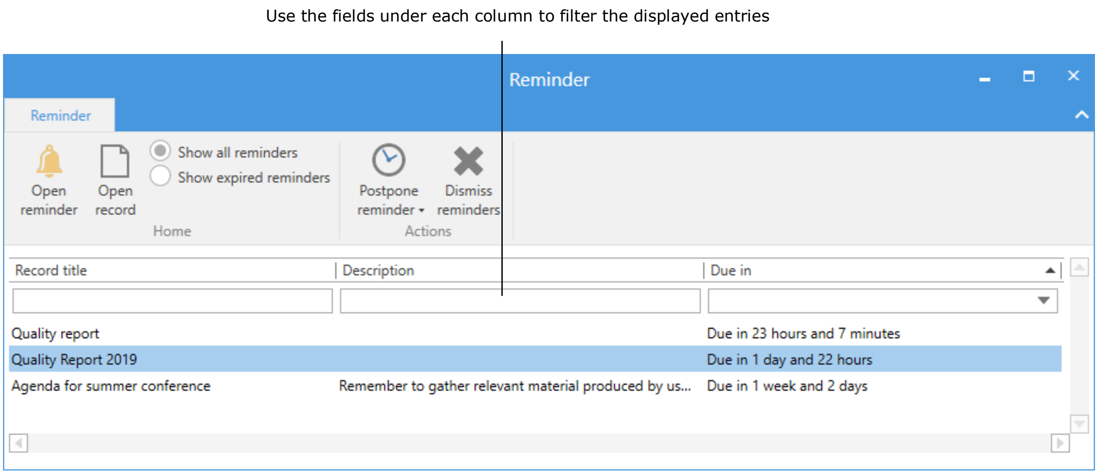
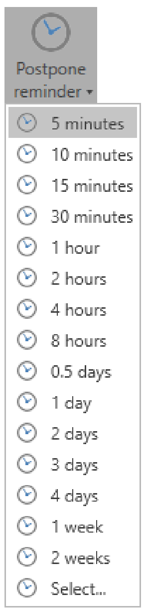


Figure 26: A reminder is selected

The functions are described in detail below.

Function	Description
"Open reminder"	Opens the reminder for editing.
"Open record"	Opens the record with which the reminder is associated.
"Show all reminders"	When ticking off "Show all reminders", all reminders are shown – both future and overdue ones.
"Show expired reminders"	If "Show all" is unticked, only overdue reminders are shown, as indicated in the dialogue box below.
"Postpone reminder"	Postpones the reminder by a chosen time period from the drop-down menu below.  **Figure 27: Postponement options for a reminder**

Function	Description
"Dismiss reminders"	Dismisses all reminders.

The "Quick access" toolbar

The "Quick access" toolbar is found at the top-left side of the main window and is displayed using the icon .

Each user has the option of adding menu items from the main window's ribbons to the quick access toolbar. This provides the user with a quick access to the features most frequently used for performing tasks in F2.

Note: The record and case windows feature similar toolbars.

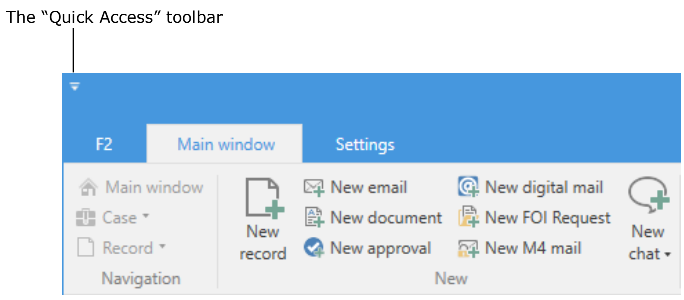


Figure 28: The "Quick access" toolbar in the main window

Customising the "Quick access" toolbar

The "Quick access" toolbar is customised by clicking on the **drop-down arrow** at the top-left corner of the main window. A drop-down menu opens where the user can **tick off** menu items to include in the toolbar.

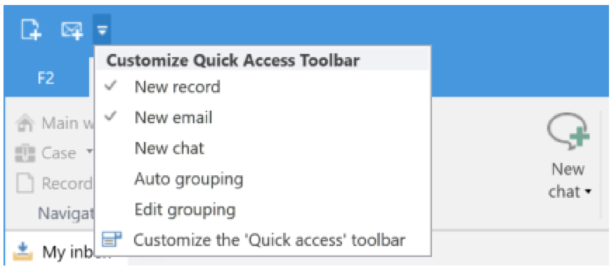


Figure 29: Customise the "Quick access" toolbar

F2 standard includes a standard list of menu items in the drop-down menu.

To add additional menu items to the toolbar, click on **Customize the 'Quick access' toolbar** at the bottom of the drop-down menu, and the dialogue window below opens.

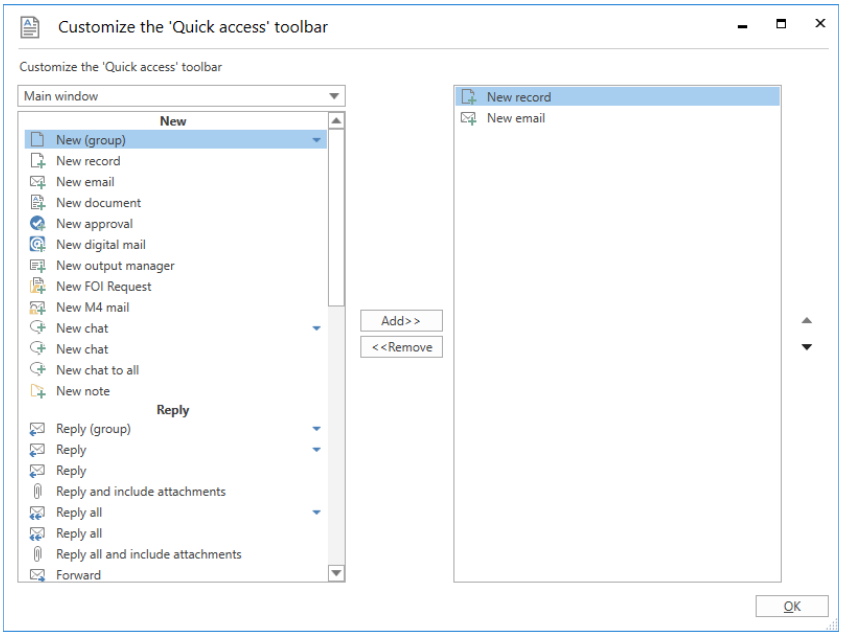


Figure 30: The "Customise the 'Quick access' toolbar" dialogue

Click on the **drop-down arrow** in the drop-down menu to select the tab from which to add menu items.

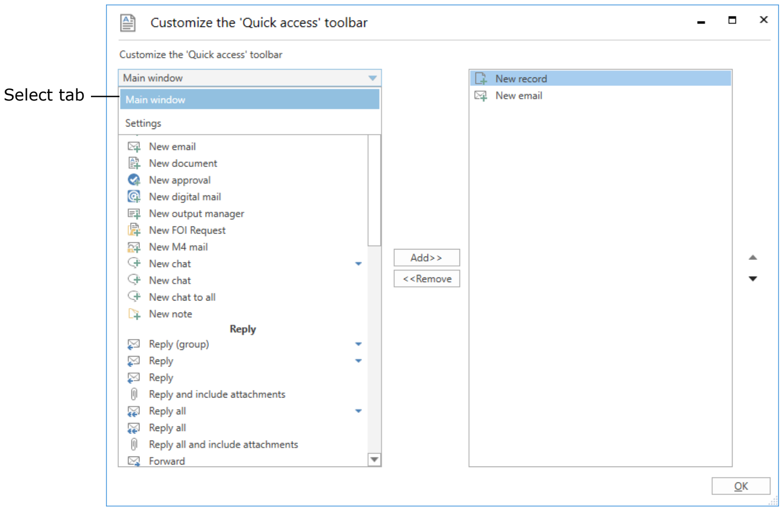


Figure 31: Select tab

Select the menu items to add to the overview below drop-down menu.

Then click on **Add** to transfer the selected menu item to the right-hand side. Finish by clicking **OK**.

The menu items from the right-hand side of the dialogue are now added to the toolbar.

> **Note**: It is not possible to click the icons' drop-down arrows in the overview. Only when it has been added to the toolbar can the menu item be accessed.

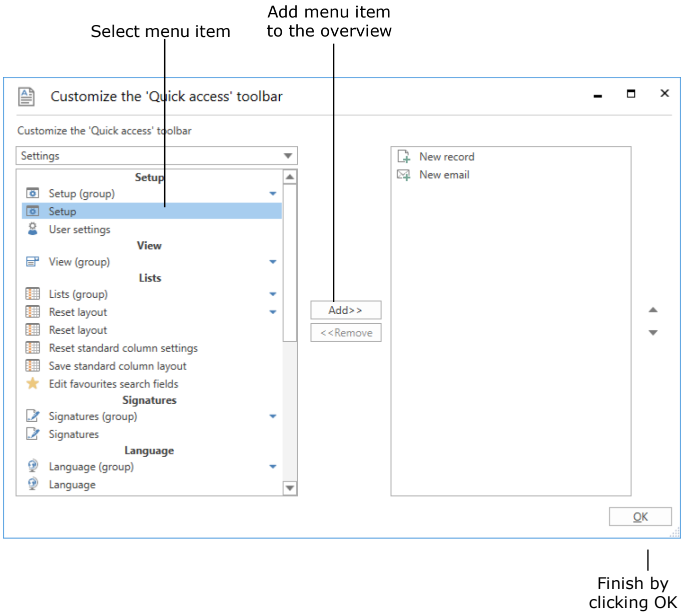


Figure 32: Add menu items

Note: It is also possible to add a menu item to the toolbar by right-clicking on it in the ribbon of the main, record or case window and selecting **Add to Quick Access Toolbar**.

List of Figures