F2 Desktop

Records and communication

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.

Working with records

This manual describes working with records in F2 as well as F2's various means of communication.

The manual is divided into the following subjects:

- **The record overview**: describes the key elements of a record in F2.
- **Record access levels**: describes the various levels of access on a record and their management.
- **Communication**: describes the communication functions in F2 that are related to records.
- **Record metadata**: describes the record metadata.
- **Record functions**: describes the functions of the record window.

Creating a new record

Create a new record by clicking **New record** in the ribbon of either the main, record or case window.

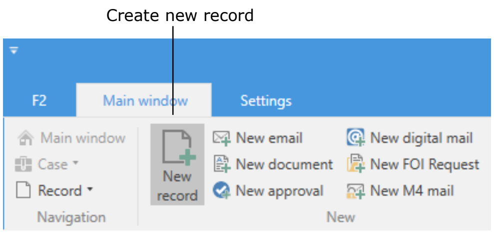


Figure 1: New record menu item

This opens the following dialogue in which the user must enter the basic information required to create the new record.

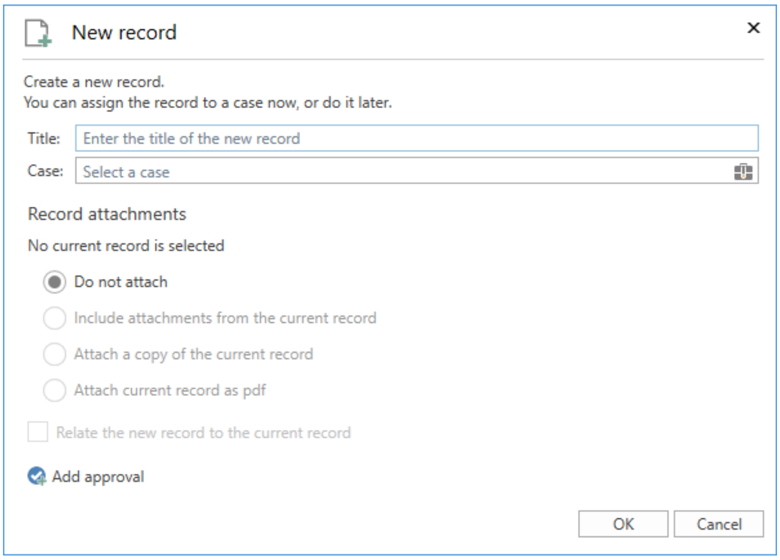


Figure 2: Creating a new record

When creating a new record, the following fields must be reviewed:

Field	**Purpose**
"Title"	Enter the title of the record here.
"Case"	Add an existing case to the record by entering the case number or case title in this field. It is possible to search for a case by clicking the icon. A new case can also be created for the record. For further information on attaching records to cases, see *Adding a record to a case*. For further information on cases and their creation, see the manual *F2 Desktop – Cases*.
"Use case number"	If this box is ticked, the new record is added to the case that was selected or open (possibly via another record) when the new record was created. **Note**: Manually delete the case number proposed by F2 to untick this box.
"Record attachments"	The following options are only active if the user has selected an active record before clicking on **New record**: • **Do not attach**: No records or record attachments are carried over to the new record. • **Include attachments from the current record:** Any attachments from the record selected before the creation of the new record are copied to the new record. • **Attach a copy of the current record:** Attaches the record selected before the creation of the new record. This option attaches the documents and metadata of the record as a PDF file. • **Attach current record as PDF:** Compiles all documents of the record selected before the creation of the new record and attaches them as a PDF file.
"Relate the new record to the current record"	Tick this box to set the new record as answer record to the one selected before clicking **New record** in the main, record or case window.
"Add approval"	Add an approval process to the record. Requires the add-on module F2 Approvals. For further information, see the *F2 Approvals – User manual*.

Click **OK** to open the record window.

The user may decide how to display the metadata fields of records from the "Settings" tab in the main window. Click on **Setup** on the ribbon and navigate to

"Record view" to choose which fields are displayed by default. For further information, see the manual *F2 Desktop – Settings and setup*.

Note: To ensure that there are no records without titles in F2, a record cannot be saved or sent unless it has a title.

When a record cannot be saved, a warning icon appears in the upper right corner of the record window, next to the user identification. Hover the cursor over the icon for additional information.

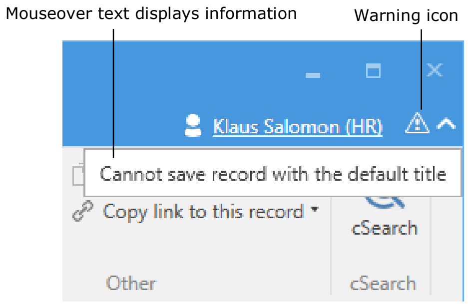


Figure 3: Warning for new record without title

The record window structure

This section provides a brief introduction to the structure of the record window. Each function and field in the record window is described in detail in later sections.

The record window can be accessed in two ways:

- By creating a new record
- By opening an existing record.

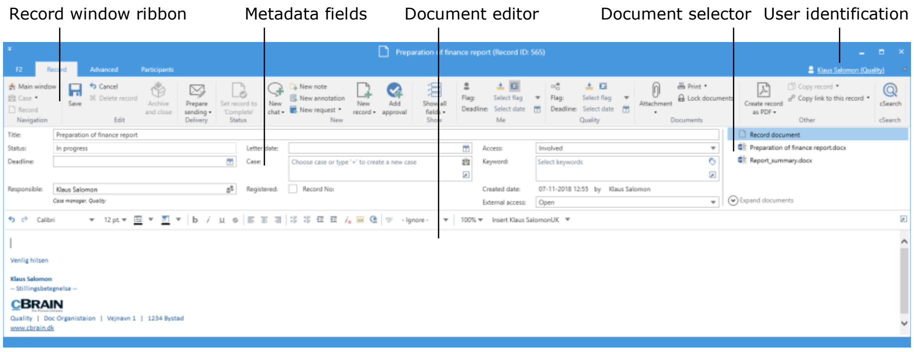


Figure 4: Record window structure

The centre top of the record window (the title bar) displays the record’s title and ID number. This lets the user check which record is open at a glance.

The ribbon of the default “Record” tab contains menu items for communication, processing and managing the record similar to the functions of the main window ribbon. The “Advanced” tab contains functions pertaining to delivery types, clean-up, version management and record history. The “Participants” tab provides the user with an overview of the involved participants. The “F2” tab lets the user access F2’s help functions. Further information on the menu items can be found in the sections *Menu items of the record ribbon*, *Menu items of the “Advanced tab”* and *Menu items of the “Participants” tab.*

At the top right corner of the window is the user identification which shows the current user’s name and unit.

Below the record window ribbon there are several metadata fields. Here the user can specify the user responsible for the record, the deadline, any keywords, etc.

To the right of the metadata fields is the document selector which shows any attached documents. For further information on the document selector, see the section *The record’s documents*.

The lower part of the record window contains the record document editor (which displays the record document), in which the user enters and/or edits the text.

The content of the record window changes depending on whether the record document or an attached document has been selected. Clicking on an attached document will display a preview of this document instead of the record document. For further information on the record document editor, see the section *The record editor*.

Record access

All users are able to access all data in F2 if they have the required rights to do so. F2's access levels, access limitations and write permissions determine which users have access to which data. A record's access level is determined by the individual user and to a certain extent the governance model of the organisation.

In F2, access to a record is managed in the record window. Access in F2 is determined by two elements: access level and access limitation. The intersection of these determine who can access a given record.

The access level is set in the "Access" metadata field, and the access limitation is set in the "Access limited to" metadata field on a record or in the "Access limitation" field on a case, if any is attached.

For further information on the record metadata fields, see the section *Record metadata*.

For further information on access limitation on cases, see the manual *F2 Desktop – Cases*.

The following sections describe F2's access levels and permissions.

Record access levels

There are three access levels in F2:

- **Involved**: Only users and units actively involved in the record can find it when performing a search. This is the most restrictive access.
- **Unit**: In addition to participants actively involved in the record, users in the record manager's unit can also view the record.
- **All**: All users within the authority can search for and view the record.

A new record is created with "Involved" as the default access level, but the responsible user can change the level manually. The access level changes automatically if the record is shared with other users.

> **Note**: Users do not receive notifications about changes made to a record's access level.

User permissions to a record

Users have one of three permissions on a record. These are:

- **Read access**: Does <u>not</u> allow the user to edit the documents attached to the record or the record metadata (including the record document).
- **Write access to documents**: Allows the user to edit the documents attached to the record (including the record document), but <u>not</u> the record metadata.
- **Full write access**: Allows the user to edit both the documents attached to the record (including the record document) and the record metadata.

The above permissions are assigned to a user in one of the following ways:

- Access to the record: Based on the access level specified in the "Access" metadata field in the record.
- Record sharing: By sharing the record in F2 with a user, e.g. via chats, sending, being added as a supplementary case manager, etc. The methods for sharing a record are discussed in the section *Communication*.

> **Note**: A user may find and open a case only if he or she has read access to at least one of its records.

User permissions via access level to a record

A record's access level must always be specified. If the record has not been shared, permissions for the record depend on its access level and whether a user is in the same unit as the record manager.

An access level overview can be found in the table below.

Access level specified on the record	**Users in record manager's unit**	**Users not in record manager's unit**
Involved	No access to the record	No access to the record
Unit	Full write access to the record	No access to the record
All	Full write access to the record	Read access to the record

Generally, the above applies until the record is shared in F2. This is covered in the next section.

User permissions when a record is shared

When a record is shared with a user in F2, he/she becomes involved in the record, i.e. assigned the access level "Involved". The sharing may happen through chats, notes, requests, adding supplementary case managers, etc. The basic principle for access when sharing a record in F2 is this: The user with whom the record is shared is assigned an access level one tier lower than that of the user sharing the record.

> **Note**: A user's access level can never be reduced through the sharing of a record.

However, if a user is added as a record participant or supplementary case manager, the access level may not be one level lower than the user who shared the record.

Users added to the "Record participants" field will always have read access to the record.

The permissions of a supplementary case manager depend on the configuration of the user who adds this participant. For further information, see the manual *F2 Desktop – Settings and setup*.

Communication

F2 offers various means of communication. Each of these is intended for use in a specific situation.

Sometimes an email is the best form of communication, sometimes it is more efficient to use the chat feature or the option of reallocating responsibility for a record instead of sending an email.

Below is a list of the various forms of communication in F2.

Communication form	**Description**
Email	Send, forward and reply to records. These functions are used for formal communication and for communication external to F2. Unlike an external email, when an email record is sent internally in F2, recipients <u>do not</u> receive a copy of the record. All F2 users see the original record in their inbox. Sent records <u>cannot</u> be modified. For further information, see the section *Email*.
Chat	Chat is used for informal communication in relation to tasks or other types of coordination and knowledge sharing in the organisation. Since chats must be created on a record, the context of the chat will always be clear, ensuring effective communication. For further information, see the section *Chat*.
Note	Like the chat, a note is an informal type of communication. Unlike the chat, the note is visible to all users with read access to the record to which it is added. Recipients can be added to the note to notify them of its creation. For further information, see the section *Notes*.
Responsible user/unit	Allocation of responsibility is used when assigning tasks to a unit or a user. The intention is to allocate tasks in F2 as one would place a task in a physical inbox or on a colleague’s desk. For further information, see the section *Allocation of responsibility*.

Communication form	Description
Supplementary case manager	Adding a user or unit as a supplementary case manager in the "Suppl. case mgr" metadata field notifies the user/unit that they are now a supplementary case manager on the record. This means that they now have permission to edit the record. The extent of this permission is specified in the personal settings of the user who adds them. Further information on personal settings can be found in the manual *F2 Desktop – Settings and setup*. For further information on adding a supplementary case manager, see the section *Supplementary case manager*.
Request	In F2 it is possible to request tasks from other users/units/authorities within the same F2 installation. For further information, refer to *F2 Request – User manual*.

The following section describes the functions and fields for the various types of communication.

Email

In F2 it is possible to send, forward and reply to email records in the style of traditional email systems.

Emails may be sent internally or externally and are mainly used for formal communication. When an email record is sent internally in F2, recipients do not receive a copy, but see the original record in their inbox.

The email record's icon and its status text in the main and record windows show if it has been forwarded or replied to, regardless of who has performed the action.

This means that the  icon is shown on a record that has been replied to, and the  icon is shown on a forwarded record, also when either action has been performed by another user. For a complete list of icons shown in the result list, see the *F2 Icon description*.

New email

Click on **New email** in the main, record or case window to create a new email record.

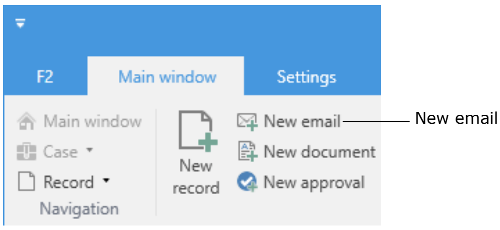


Figure 5: "New email"

The new record will open, and the standard metadata fields used for delivering email records will be displayed.

The user may configure which metadata fields are displayed when an email record is created. The metadata field display options are found via the "Settings" tab in the "Setup" menu item. From here, go to "Record view" to choose how metadata fields are displayed in the record window. For further information, see the manual *F2 Desktop – Settings and setup*.

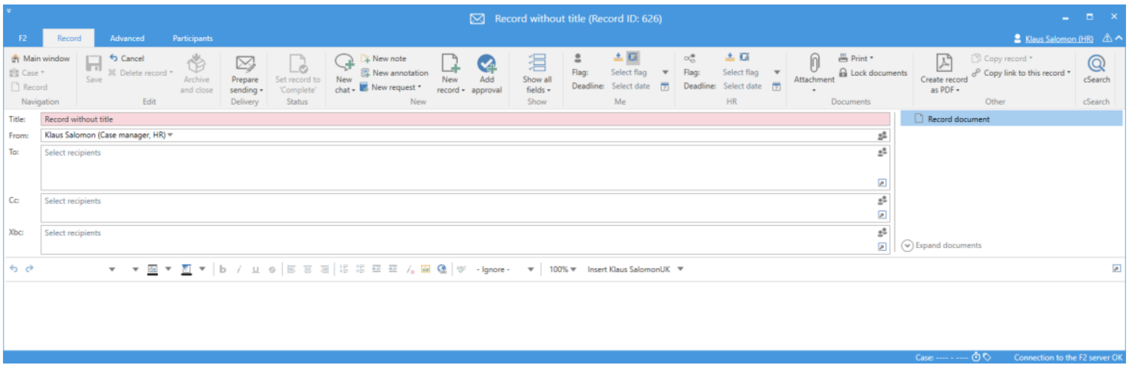


Figure 6: Newly created email record

When creating an email record, the user must consider the following metadata fields:

Field	Function
"Title"	Corresponding to the subject field in an email, the user must enter a title in the email record window. Contrary to the standard record creation process in which F2 needs the user to enter a title before the record is created, this field is not filled in automatically.
"From"	This field is filled in automatically with the user's standard sender when a new email record is created. It is possible to select whether the standard sender for email records is the user or the user's unit. For further information, see the manual *F2 Desktop – Settings and setup*. F2 allows for the following to be used as the sender: • The user • The user's unit • Another user in the unit • The authority. When text is entered in the field F2 will search for names of internal users, distribution lists and external participants. Participants may also be added by clicking on the icon, which opens the "Choose participant" search dialogue. For further information on participant searches, see the section *The "Choose participants" dialogue*.

Field	Function
"To"	Enter the recipient(s) of the email record here. There are three ways to add participants as recipients: • By typing in the field directly. F2 will search for names of internal users, distribution lists and external participants. • By clicking the icon, which opens the "Choose participant" search dialogue. For further information on participant searches, see the section *The "Choose participants" dialogue*. • By copying and pasting email addresses from e.g. an Excel file.
"Cc"	Enter any Cc recipients of the email record here. Cc recipients are added in the same manner as "To" recipients.
"Xbc"	Enter any Xbc recipients of the email record here. Xbc recipients are added in the same manner as "To" recipients. Adding an external participant here is similar to adding a recipient in the "Bcc" field of traditional email systems. There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

The "Choose participants" dialogue

Clicking the icon in the "To", "From", "Cc" or "Xbc" fields opens the "Choose participants" search dialogue.

In this dialogue the user selects participants to add to the desired field. To add a participant and close the dialogue, double-click the **participant's name** or select the name and click on the **OK** button. To add a participant and keep adding, click the **Add participant(s)** button. The dialogue will show any added participants in the "Chosen participants" list.

By clicking on **Advanced search**, it is possible to perform an advanced search for participants. For further information on this, see the manual *F2 Desktop – Searches*.

Click on **OK** when all desired participants have been added to the list.

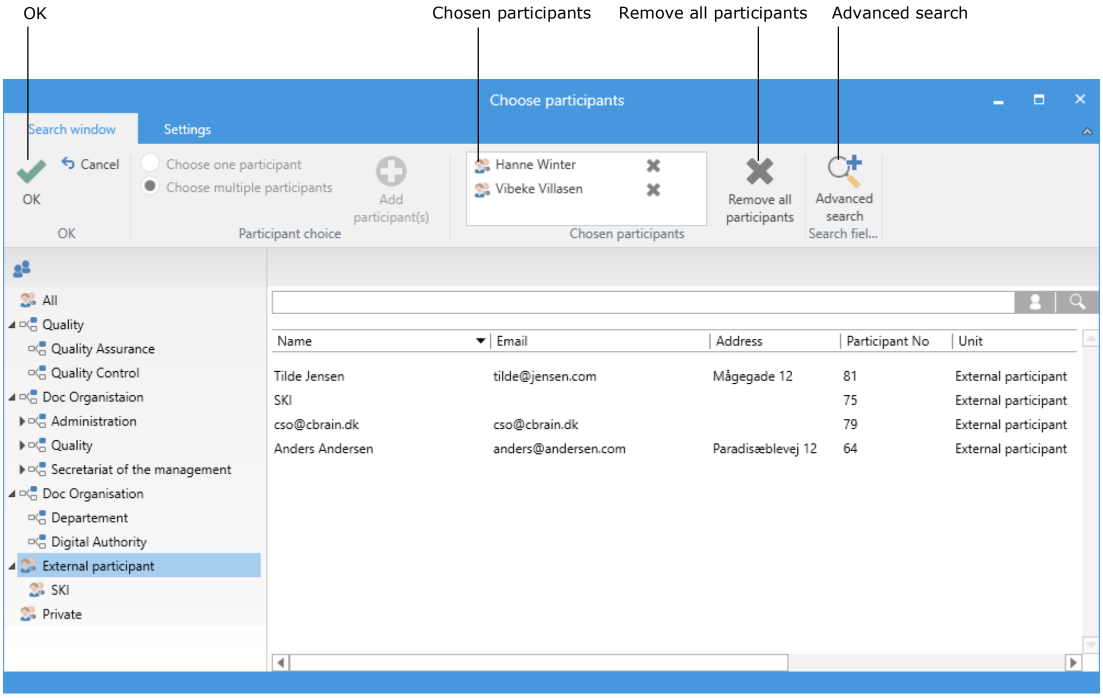


Figure 7: The "Choose participants" dialogue

Further information on creating participants and editing their placement and properties, see *F2 Desktop – Administrator*.

Drag and drop participants

A selected participant may be dragged and dropped between the "To", "Cc" and "Xbc" fields. The user can copy a participant to another field by holding the **Ctrl** key while dragging and dropping the name.

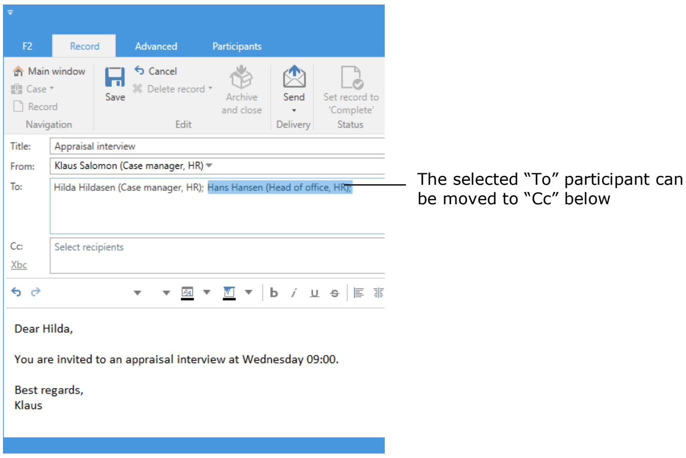


Figure 8: Drag and drop participant

Display participants

Recipients in the "To", "Cc" and "Xbc" fields can be displayed as a list, so it is easier for the sender to see their names.

Clicking on expands the field and displays a list with all recipients.

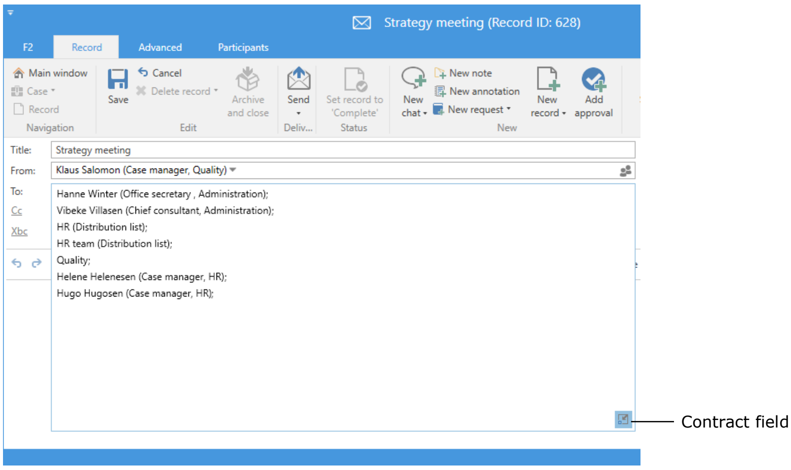


Figure 9: Participants displayed as a list

The participant properties can be accessed from the email record by right-clicking on the participant and selecting **Properties for [participant]**.

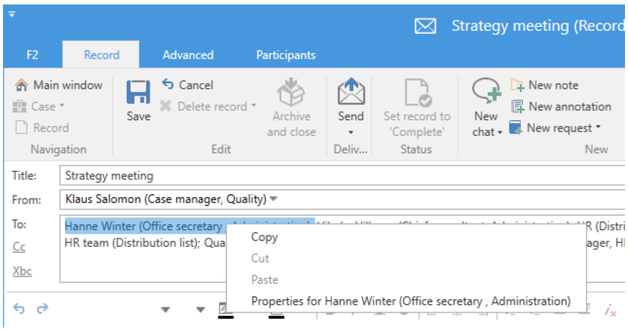


Figure 10: Properties for a participant

This will open the "Properties for the user [participant]" dialogue.

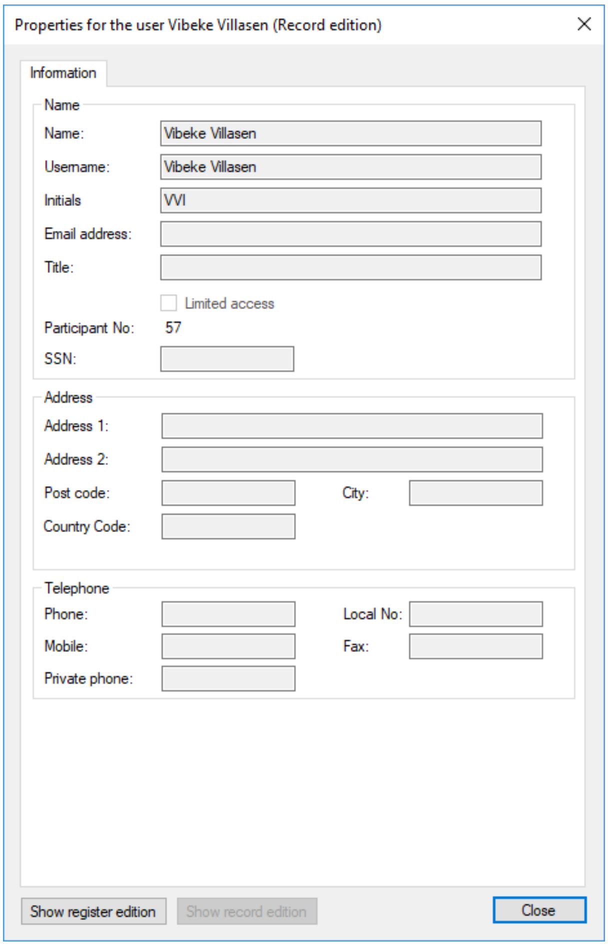


Figure 11: The "Properties for the user [participant]" dialogue

In the participant register it is possible to edit and delete information or move a participant. For further information, see *F2 Desktop – Administrator*.

Create participants from emails in F2's participant register

For incoming mails, F2 automatically checks whether an external participant already exists in the participant register. This prevents duplicate names and email addresses.

If F2 detects a participant on an email record that cannot be found in the register, it may be added in one of the following ways.

- F2 gives the option of creating the participant when the record is received or sent. This is described in the section *Automatic creation of new participants in F2's participant register*.
- The user can create the participant from the "To", "Cc" or "Xbc" fields directly by right-clicking on the unknown participant's email address, or by clicking on the "Create participants" link which appears when an unknown email address is added. Both methods open the "Save external participants" dialogue from which the participant can be saved. The "Create participants" function is useful when creating several participants. For further information on this dialogue, see the section *The "Save external participants" dialogue*.

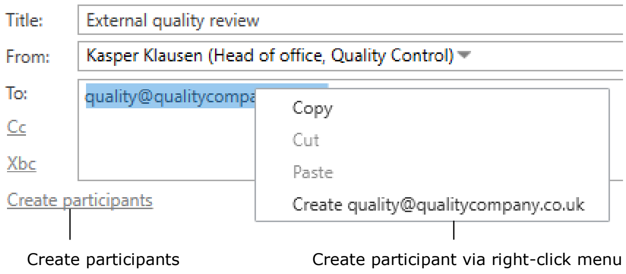


Figure 12: Create external participant in the participant register

Automatic creation of new participants in F2's participant register

F2 suggests creating senders and recipients (including Cc and Xbc) in the participant register under the following circumstances:

- When receiving emails, F2 suggests creating participants for any unknown senders in the "From" field.
- When a user sends a mail out of F2 and enters a new recipient address in the "To", "Cc" or "Xbc" fields, F2 suggests creating these as external participants, unless the user is working in the private archive.
- If the user sends a record from the private archive, F2 suggests creating any unknown recipients in the private participant register.

Participants are saved via the "Save external participants" dialogue which opens in the circumstances listed above.

The "Save external participants" dialogue

Saving an unknown participant to F2's participant register is done via the "Save external participants" dialogue.

From here it is possible to create a participant or replace an unknown participant with an existing one. This is done by ticking either the "Create participant" or the "Replace participant" box. Through this dialogue, the user also chooses where to place the participant.

Double-clicking on a participant or clicking on "Properties" will open the "Properties for the user [participant]" dialogue, in which its name may be changed if necessary. Further information, such as the participant's address or phone number, can also be added. It is then possible to search for these data in F2's participant register.

Click on **OK** to create or replace a participant. To refrain from creating a participant, untick the "Create participant" and "Replace participant" boxes and then click on **OK**.

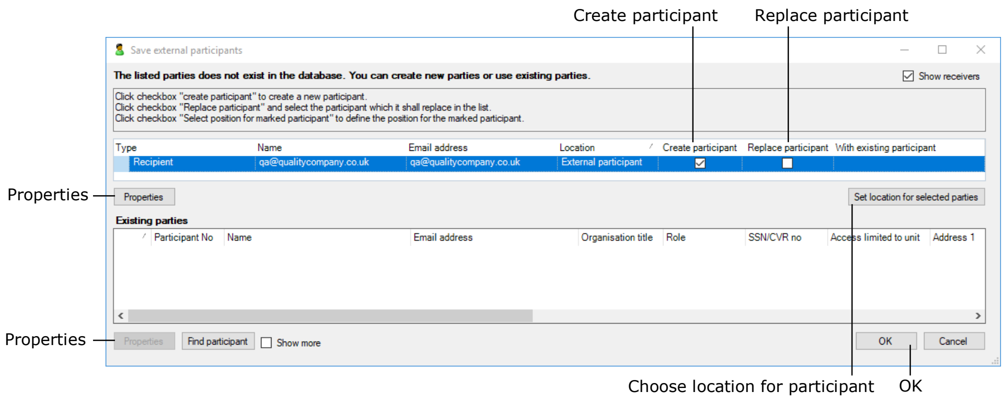


Figure 13: The "Save external participants" dialogue

Placement of new participants

Click on the **Set location for selected parties** button in the "Save external participants" dialogue to open the "Choose participants - as a location" dialogue. Here the user selects the participant's location by double-clicking on it or by selecting the location and then clicking **OK**.

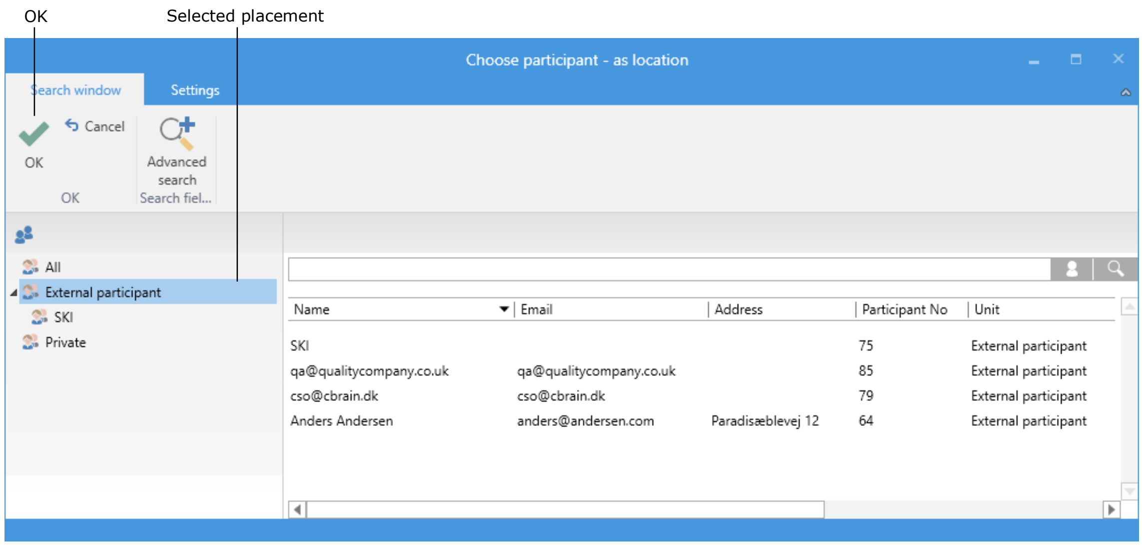


Figure 14: Choose location for selected participants

The standard location for new participants is the "External participant" group. This setting can be changed during the installation of F2.

Replacing an existing participant

The "Save external participants" dialogue will suggest an already existing participant that may match the external participant, if any are found. The user can then choose to replace the unknown participant with the suggestion.

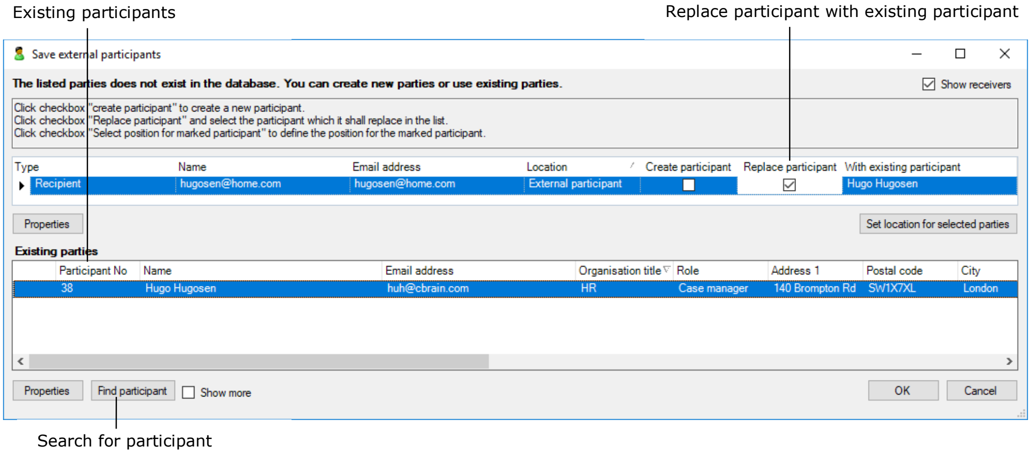


Figure 15: Replace existing participants and duplicate check

To replace an unknown participant with an existing one, tick the "Replace participant" box. Then select a replacement participant from the "Existing parties" list. When this is done, the selected participant is displayed in the "With existing participant" column.

By clicking the "Find participant" button, it is possible to search for a replacement participant not listed in the dialogue.

Format selector for emails

Before sending an email, it is possible to select the file format for any attached documents. If the delivery metadata fields are shown, the user will be able to change formats in the document selector. Here it is possible to keep the original file format or convert the files into PDFs.

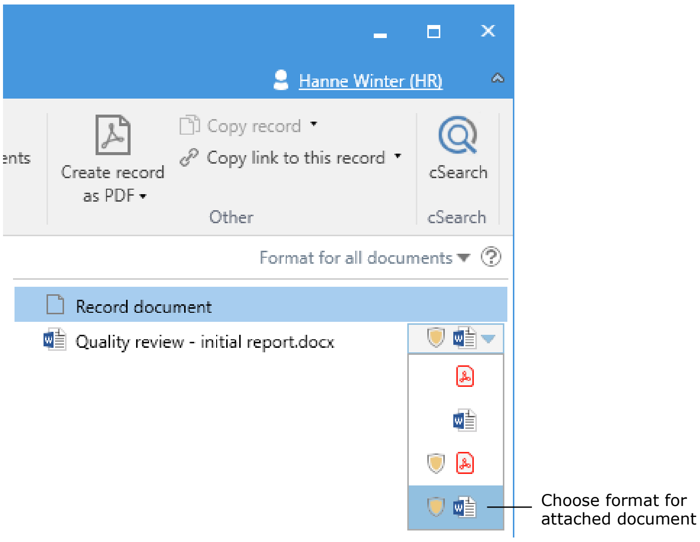


Figure 16: Format selector

Note: The format selector has no effect on emails sent internally in F2. It only affects emails sent to external participants who will receive attachments in the format selected by the sender.

If there are several documents attached to the record, it is possible to mass-select the format.

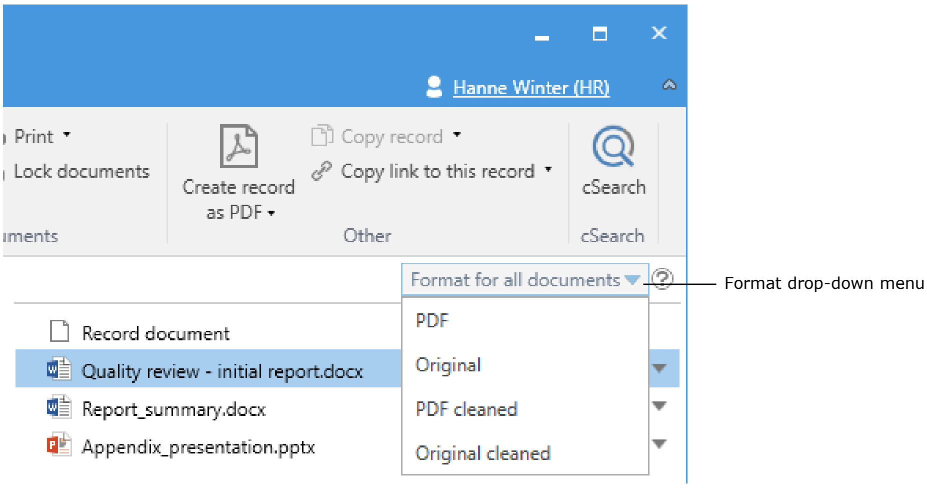


Figure 17: Selecting the same format for all documents

Email details

The record window for an email record shows when it has been sent or received and whether it has been exchanged internally in F2 or externally. Any issues during the sending of the email are also registered. These details are shown directly below the record ribbon.

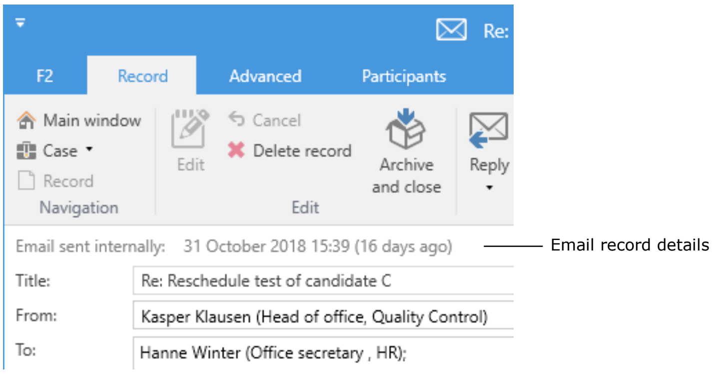


Figure 18: Email record details

Receiving external emails

When an email is received in F2, its text and any attachments will be locked so they cannot be edited.

However, it is possible to edit certain metadata for an incoming email, if the user has full write access to the record:

- **Title** may be edited.

- **From** (sender), **To** (recipients) and **Cc** (recipients) may be edited.

Changes to the record's metadata can be seen via the "Advanced" tab of the record window. From here, click the **History** menu item and then the **Show metadata** view as shown below.

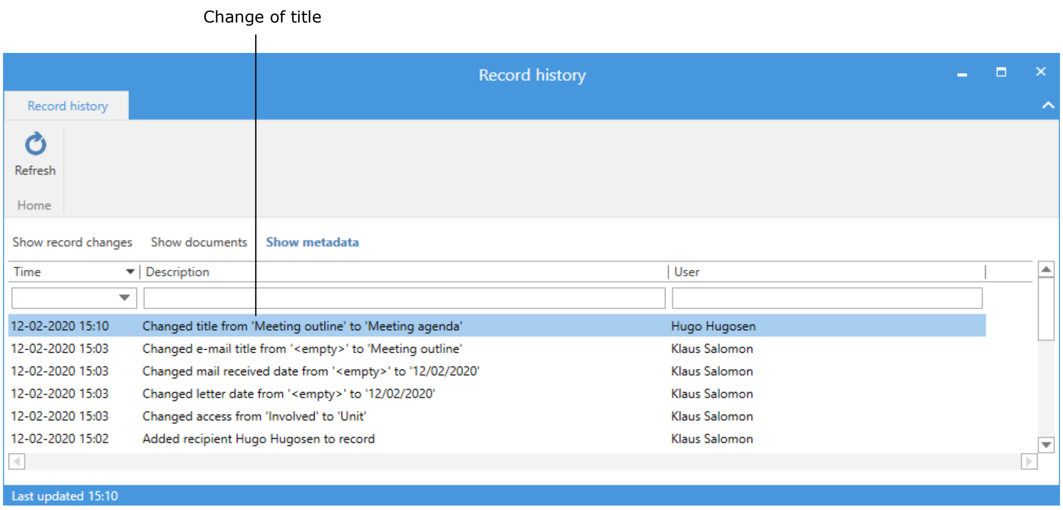


Figure 19: History of the record metadata

> **Note**: It is possible to search for both the record's current as well as its original title via the "Record title" and "Record/case title" search fields. The search result will display the email record's current title. For further information on searches, see *F2 Desktop – Searches*.

Automatic case linking when external participants reply to emails from F2

F2 can be configured to link replies from external users to the record to which they are replying. This can be configured during the installation of F2.

An email sent to an external recipient may be assigned an ID number in the title, as shown below.

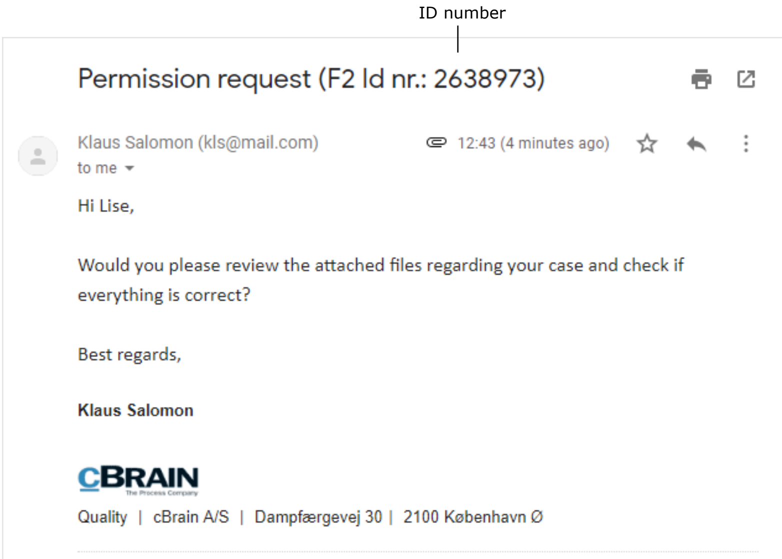


Figure 20: ID is included in title of external mail

Note: The ID description must be configured by an F2 administrator and may differ from the above example.

If the external recipient uses the email reply function, F2 recognizes the ID. The incoming email record will then enter into the correct context in F2.

If the record to which the incoming email record is related has a case number, the incoming email record is automatically added to the case.

In the record window it is possible to see other records from the same email correspondence if this automatic relation is set up. The "Related records" dialogue is found on the "Advanced" tab.

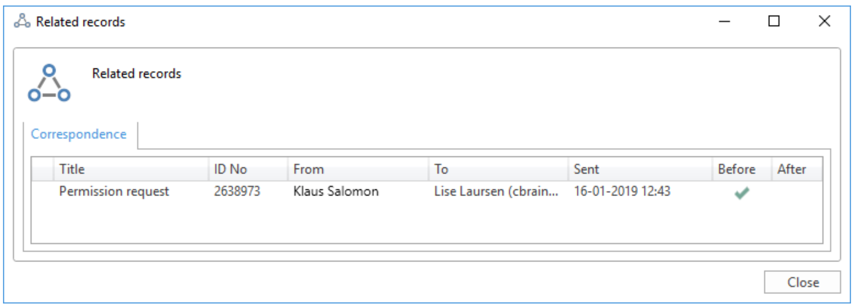


Figure 21: The "Related records" dialogue

Access levels and emails

Access level for external emails imported into F2

If F2 is configured to import emails from a mail server, the records that are created will be assigned an access level automatically. This is a critical issue to consider for the F2 organisation.

For many organisations it is an advantage that emails which are NOT private can be viewed and processed by various employees, and that these emails are available to the organisation e.g. when employees are ill or leave their position.

By default, F2 is configured to respect employee privacy. This means that F2 automatically assigns the "Involved" access level to imported emails, so only the recipient will be able to view the email unless the access level is changed.

It is also possible to assign the access level "Unit" to imported emails. This configuration is done in cooperation with cBrain.

The access level for imported emails can be viewed and configured in the "Setup" dialogue found on the "Settings" tab of the main window.

For further information on personal settings, see the manual *F2 Desktop – Settings and setup*.

Access level for replying and forwarding

Records that are replied to or forwarded are automatically given the access level corresponding to that of a newly created record. As with new records, the user also has the option of using case help.

> **Note**: The access level for new records depends on the organisation's configuration.

> **Note**: In cooperation with cBrain F2 can be configured to copy the access level of the original record when it is replied to or forwarded.

Case help for emails requiring formal processing

F2 can be configured to expand the access level for formal emails while restricting the access level of users' private emails. This is done with case help.

If an imported email requires formal processing, the recipient ticks the "Case help" box in the record window.

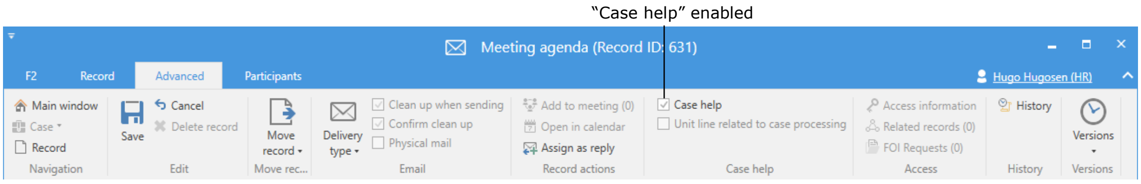


Figure 22: "Case help" on the "Advanced" tab

For more information on this, see the section *Case help*.

Chat

Chat is used for informal coordination and communication related to work tasks or knowledge sharing.

The chat function in F2 is particularly effective because the chat is always related to a specific record.

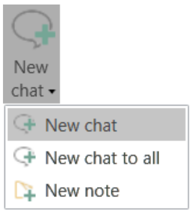


Figure 23: The main window's "New chat" menu item

A new chat can be added to a record, including an email record, via the main and record window ribbons.

When a record is open, any new chat that is created is automatically linked to this record. Chatting always takes place in the context of a specific record.

Note: A new chat is always linked to a record, because a chat must always be created via a record.

The chat function is used for chatting with other F2 users in the same authority about a particular record.

Chats have a number of advantages to sending internal emails, for example:

- A chat can only be seen by the users who are added as chat recipients.
- A chat can be deleted from a record.
- A chat makes it possible to edit a record without sending it.
- Several chats with several users can be created and opened on the record simultaneously.
- A chat can be used as a to do list for the chat creator, since it is only visible to other users if they have been added. This way a user can have one or more to do lists on a record that are only visible to him/herself.

Only chat participants can see the contents of a chat, but via the "Participants" tab anyone with access to a given record is able to see which users are added as chat participants.

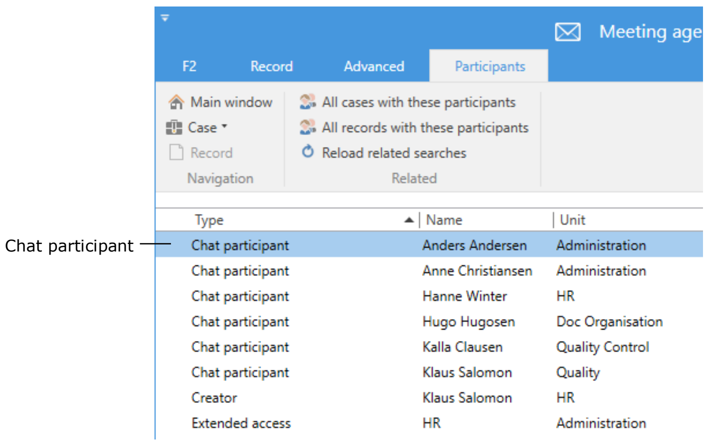


Figure 24: Chat participants shown on the "Participants" tab

Creating a new chat from the main window ribbon

A chat can be created directly from the main window. Select a record in the main window and click on **New chat.** A new chat is then created without the record being opened.

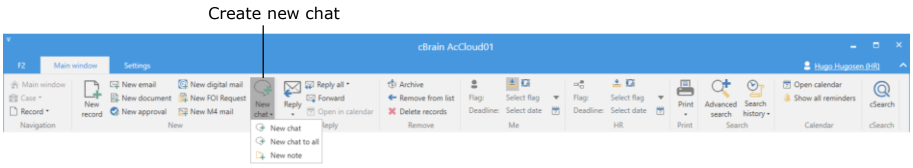


Figure 25: Add new chat from the main window ribbon

Creating a new chat from the record window ribbon

A chat can be created from the record window ribbon. Click on the menu item **New chat** to create a chat linked to the record.

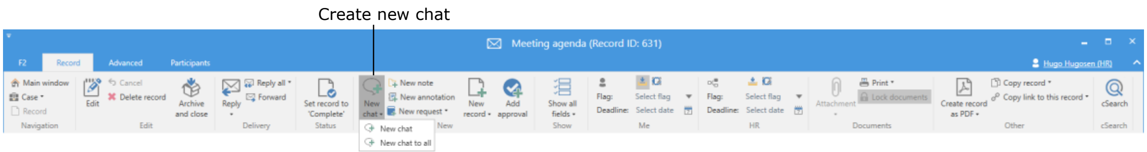


Figure 26: Add new chat from the record window ribbon

When a new chat is created, either from the main window or from the record window, the chat window opens.

The chat window

In the chat window it is possible to add participants to a conversation and exchange messages. If there is more than one chat on a record, a list of chats is shown at the left side of the window.

A new chat can also be created from the chat window by clicking **New chat**.

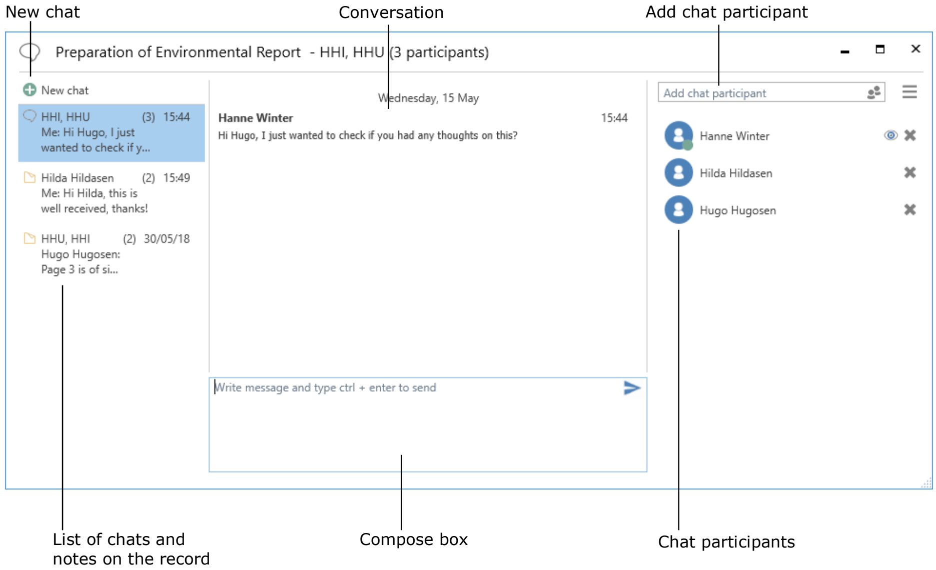


Figure 27: The chat window

Chat participants can be added in the following ways:

- In the "Add chat participant" field, start typing a name. F2 will suggest relevant users in a drop-down menu from which a participant can be selected.
- Click on the icon in the "Add chat participant" field. This will open the "Choose participants" dialogue from which one or more participants can be added.

  To add a user as a chat participant, search for the user's name in the "Choose participants" dialogue. Double-click on the user to add him/her to the chat.

  To add more than one chat participant, select a user and click on the **Add participant(s)** button in the dialogue ribbon. When all wanted participants have been selected, click on **OK** to add them to the chat.

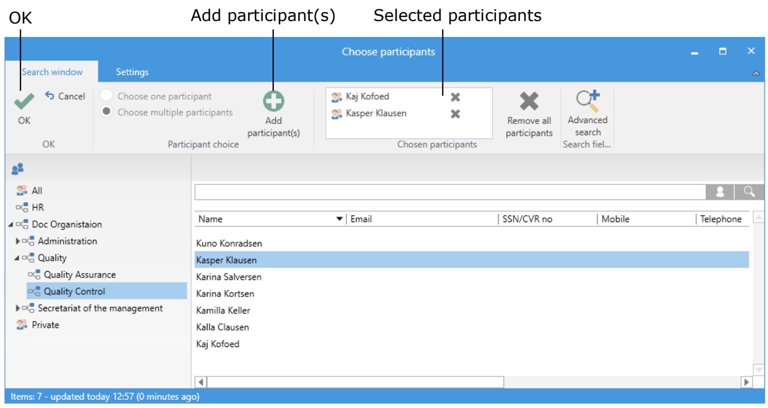


Figure 28: Add chat participants via the participant register

When a chat participant is added, their name is shown in the participant list to the right in the chat window. Added participants can add additional users to the conversation. If a user profile has a picture, it is displayed in the chat participant list.

To write a message, click the compose box in the lower part of the window. Send the message by clicking the icon or pressing **Ctrl+Enter**. Previous messages from all users are displayed above the compose box.

> **Note**: File paths, URLs and f2p links inserted in chat messages are converted to clickable links.

When a participant has read the latest message in the conversation, the icon appears next to their name.

To remove a participant from the chat, click the icon next to their name. While only the creator of the chat can remove him/herself from the participant list, all other participants can remove themselves as well as any other participants.

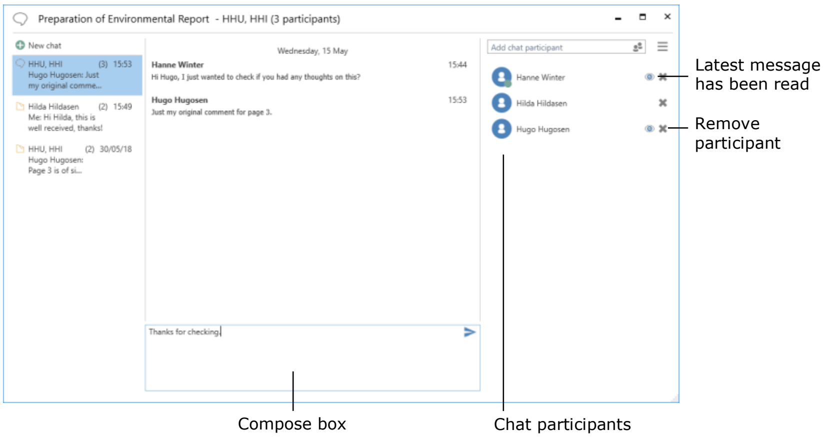


Figure 29: Conversation in the chat window

When a chat is sent to one or more participants, its record appears as unread in their inboxes in F2. For further information on receiving a chat, see the section *Receiving a chat.*

Close the chat window by clicking on the **X** in the top right corner or by using the shortcut key **Esc**.

Unsent chat messages are kept when the user cycles between chats or notes. If the user attempts to close the window while there are unsent messages, a warning dialogue appears.

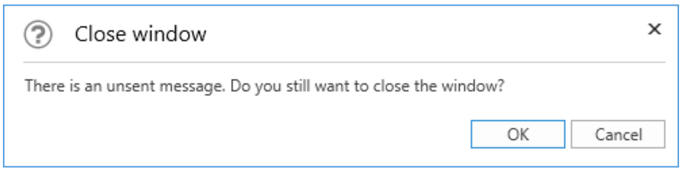


Figure 30: Unsent message warning

The chat window also remembers when the user adds participants to an unsaved chat.

A warning message is shown in chat window if the user is the only participant in a chat.

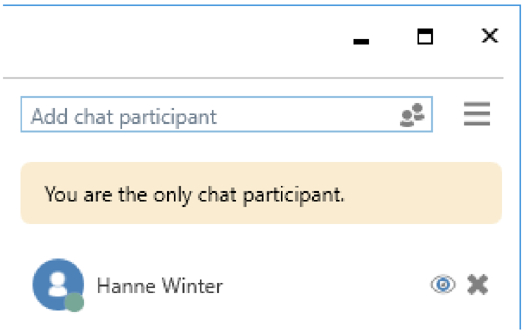


Figure 31: Chat window warning message

Chat overview

The left side of the chat window displays the list of chats and notes in which the user involved. Both the chat titles and their participants are displayed. The number of participants is shown in brackets.

An unnamed chat will use the initials of the participants as its title. The full names of the participants are displayed when hovering the mouse over the initials. If there are only two participants on a chat, the other user's name is used as the title.

The list of chat participants is sorted after the latest chat message, i.e. the latest user to enter a message is the first one listed.

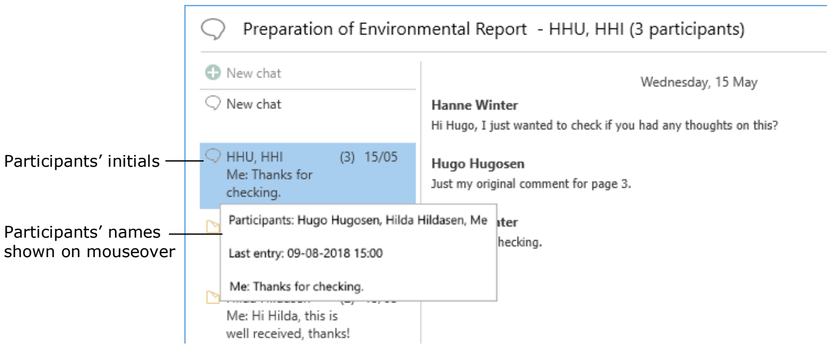


Figure 32: Participants' initials and full names in chat window

The functions of the chat window

The chat window's functions are found in the drop-down menu in its top right corner.

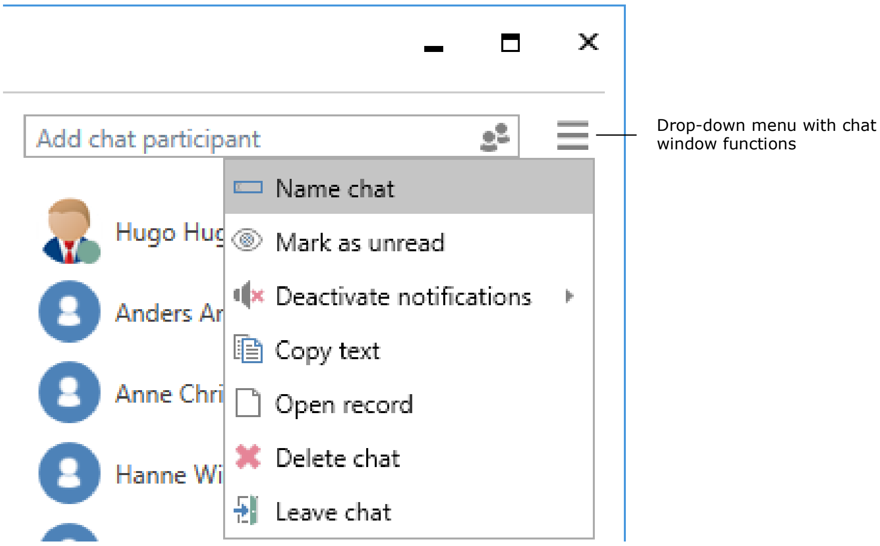
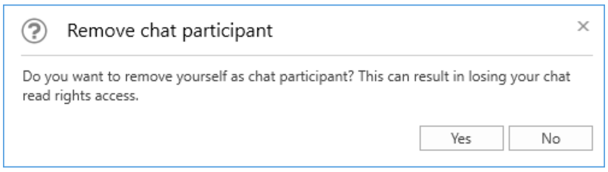


Figure 33: Chat window functions

The functions are described below.

Function	**Purpose**
"Name chat"	Opens a dialogue that lets the user name the conversation. This may be useful if there are several conversations on the record. The chat title is shown in the format "[Record title] – [Chat title]". If the chat has not been named, the participants' names are displayed instead of a chat title. If there are more than two participants, only their initials are shown.
"Mark as unread"	Mark the latest message as unread. When the user selects this function, the chat window will close and the icon appears on the record.
"Deactivate notifications"	Disables notifications for a given chat for one, eight or 24 hours, or until the user reactivates them.  **Figure 34: Options for deactivating notifications** Records with chats for which the user has deactivated notifications do not appear in his/her inbox when a participant adds a new message.
"Copy text"	Copies the entire conversation.

Function	Purpose
"Open record"	Opens the record to which the chat is linked.
"Delete chat"	Deletes the chat. Can only be done by the creator. F2 asks for confirmation when a user deletes a chat.
"Leave chat"	Leave the chat.  **Figure 35: Leave chat** **Note**: If a user removes him/herself from a chat whose record has the "Involved" access level, the user may lose access to the record.

Receiving a chat

When a chat participant receives a message, the record to which the chat is linked appears in his/her inbox. The record title is shown in bold, and if the "Message icon" column is displayed in the result list, a chat icon with a blue circle is visible. This icon indicates that there is a chat with an unread message. The blue circle disappears when the chat is opened.

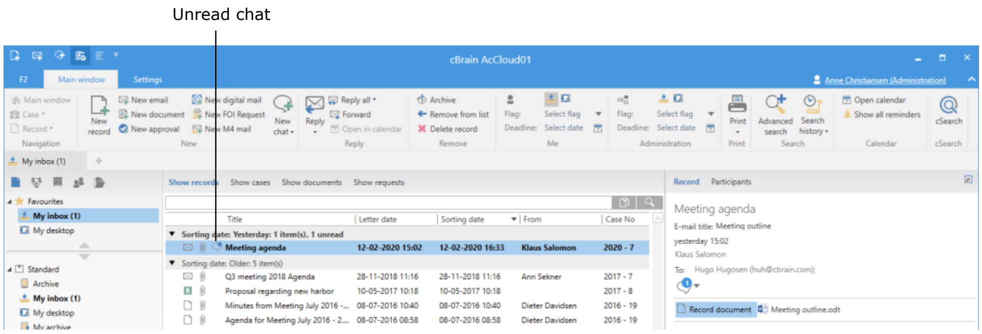


Figure 36: New chat in inbox

The chat message can be read by hovering the mouse over the chat icon as shown below.

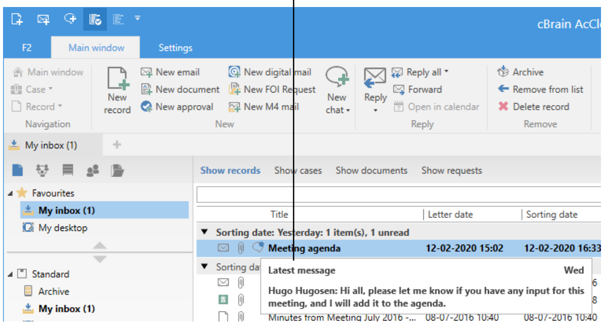


Figure 37: Chat message on mouse over

A chat participant is able to see whether other chat participants are online, offline or "Out of office". Hover the cursor over a chat participant who is "Out of office" to see their return date if they have entered any.

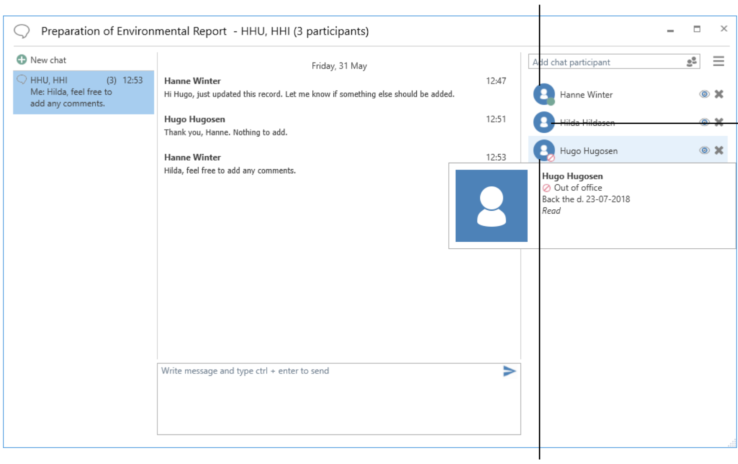


Figure 38: View chat participants' status

Regardless of the user's current unit, it is always possible to check all chats in which he/she is a participant. Switching job roles is not required to read chat messages addressed to the user.

The read/unread indication is applied to the user across all of the units in which he/she has a job role.

If the main window preview is enabled, the chat icon is displayed above the record document. Click on the chat icon to view the first two lines of the chat content. If there are several chats on the same record, these are displayed below each other as shown in the example below.

Note: The above also applies to the preview of notes, annotations and requests in the main, record and case windows.

The chat can be marked as read from the preview. The chat preview is also available in the record window.

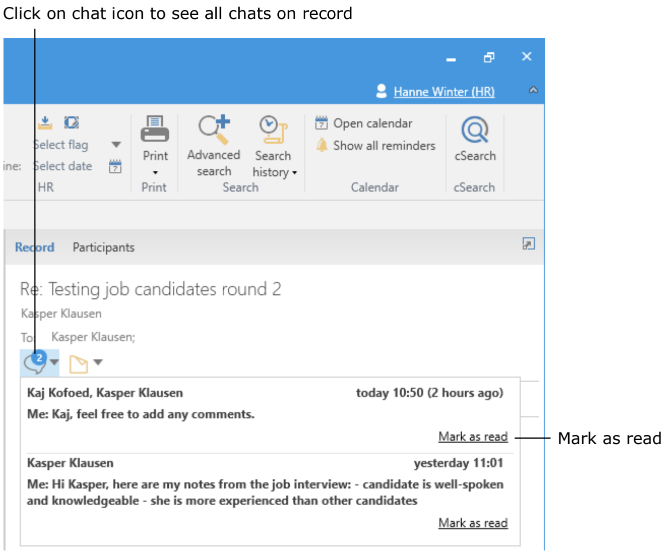


Figure 39: Chats in the preview window

Chats are placed to the right-hand side of the record window, above the document selector.

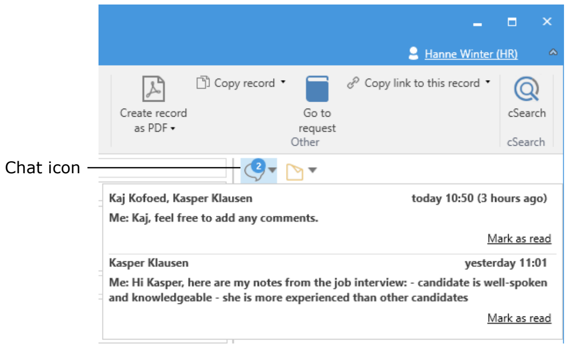


Figure 40: Chat icon in the record window

In the preview, hover the cursor over a chat to display a tooltip showing the entire content of the latest message. This is useful for particularly long messages. The tooltip is displayed for ten minutes, giving the user time to read the content.

![cBrain logo]

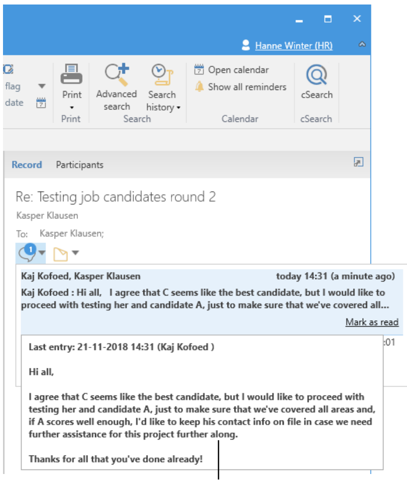


Figure 41: Chat tooltip in main window preview

> **Note**: This tooltip also appears for notes, annotations and requests in the preview of the main, record and case windows.

The chat recipient's record access level

When a record is shared through a chat, it is subject to the basic access level principles for records. The chat recipient will be granted access to the record one level below that of the chat creator, unless the recipient already has a higher access level.

This means that if a user with full write access to a record sends it to another user via a chat, this user will have write access to its documents. The access levels for chat recipients are listed in the following table.

Chat sender's access level	Chat recipient's access level
Full write access to record and documents	Write access to documents
Write access to documents	Read access
Read access	Read access

> **Note**: A user's access level to a record will never be reduced via a chat.

Example 1: If the record has the access level "Unit" and the user responsible for the record chats with a colleague in the same unit, the access level of the colleague will <u>not</u> be reduced according to the table above. The colleague already has the access level "Unit" with full write access, and this is not reduced.

Example 2: If the record has the access level "All" and the user responsible for the record chats with a colleague in the same unit, the access level of the colleague will <u>not</u> be reduced according to the table above. The colleague already has the access level "Unit" with full write access, and this is not reduced.

Example 3: If the record has the access level "All" (i.e. all users have read access) and the user responsible for the record chats with a colleague outside his/her unit, the chat recipient's access level is upgraded to write access to documents according to the table above.

> **Note**: Access levels may change when a user is placed in a new unit or if a new user becomes responsible for the record.

Chat to all

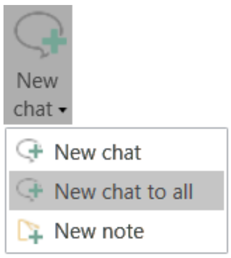


Figure 42: Create "New chat to all" in the main window

The "New chat to all" function can be used after receiving an email record.

Instead of entering participants from the "From", "To" and/or "Xbc" fields manually in a new chat, click on **New chat to all.**

F2 then creates a chat in which all participants on the email record are added as participants.

Click on **New chat to all** to add the following participants to the chat:

- Sender of the email record
- Recipient(s) of the email record
- Cc recipient(s) of the email record
- Xbc recipient(s) of the email record

This function is available from both the main window and the record window ribbon.

> **Note**: Only internal F2 participants, and not external participants, are added to the chat.

Notes

As with the chat, a note is an informal way of communicating in F2. A considerable difference is that all users with read access to a record are also able to see its notes. In addition, a note cannot be deleted automatically, but remains on the record unless a user with the "Can delete notes" privilege deletes it.

Notes can be added to both records and cases without entering edit mode. Notes can also be added to records and cases that are completed. There is no limit to the number of notes that can be added to a record or case.

Participants can also be added to a note, but only on records. When a participant is added to a note, it appears with the record to which it is linked in the participant's inbox. Adding participants to a note may be useful e.g. when a user adds a telephone memo to an email record and wants to inform other users about this via their inboxes.

Note: Deleting notes requires the "Can delete notes" privilege.

Creating a note via the main window

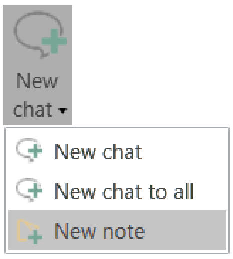


Figure 43: Create a new note in the main window

In the main window, click on **New note.** The menu item "New note" is found in the drop-down menu of "New chat".

This opens the note window for the selected record, and the user can enter text and add recipients.

For further information on this window, see the section *The record's note window*.

Creating a note via the record window

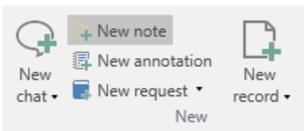


Figure 44: Create a new note in the record window

In the record window ribbon, click on **New note** in the "New" menu group. This opens the note window, and the user can enter text and add recipients.

For further information on this window, see the section *The record's note window*.

Creating a note via the case window

Figure 45: Create a new note in the case window

In the case window ribbon, click on **New note** in the case window ribbon. It is not possible to add participants to a note on a case.

For further information on this window, see *F2 Desktop - Cases*.

The record's note window

The user enters the note text in the compose box at the bottom of the window and clicks on  or the keyboard shortcut **Ctrl+Enter** to send. The note text will then appear above the compose box as shown below.

Recipients can be added to a record note. These are added the same way as chat recipients. See the section *The chat window*.

If a record has multiple notes or conversations, a list is shown to the left in the window.

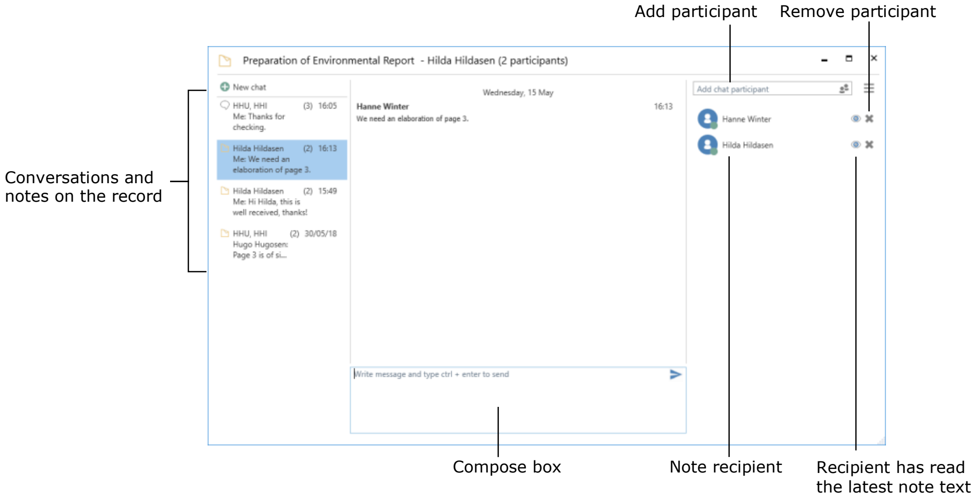


Figure 46: The record note window

When a note recipient is added, their name is shown in the participant list to the right-hand side of the window. Added participants can add additional users to the note. If a user has a profile picture, it is displayed in the note participant list.

When a participant has read the latest note text, the icon appears next to their name.

To remove a participant from the note, click the icon next to their name. While only the creator of the note can remove him/herself from the participant list, all other participants can remove themselves as well as any other participants.

When a note is sent to one or more participants, its record appears as unread in their inboxes in F2.

Note: A note can also be sent to participants that are offline. If a participant is not logged into F2, he/she will see the record with the note in his/her inbox when logging back in.

Close the chat window by clicking the X in the top right corner or by using the shortcut key **Esc**.

The functions of the note window

The note window's functions are found in the drop-down menu in the top right of the note window.

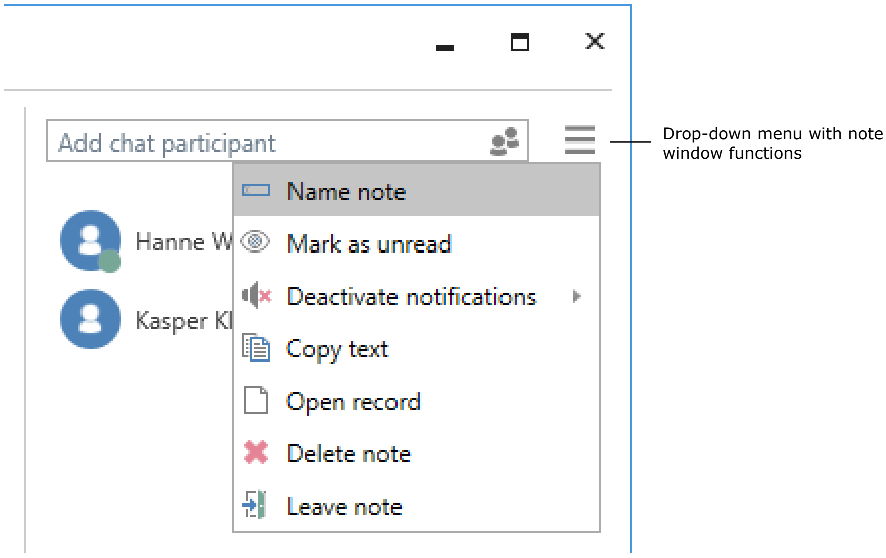
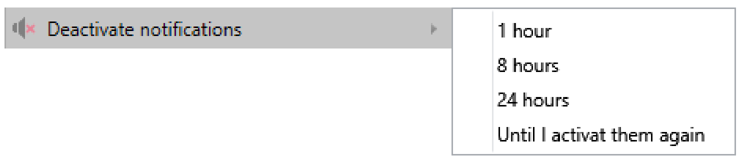
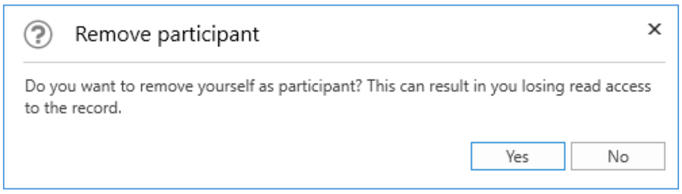


Figure 47: The record window's note functions

These functions are described below.

Function	Purpose
"Name note"	Opens a dialogue that lets the user name the note. This may be useful if there are several notes on the record. The chat title is shown in the format "[Record title] – [Note title]". If the note has not been named, the participants' names are displayed instead of a note title. If there are more than two note participants, only their initials are shown.
"Mark as unread"	Mark the latest note message as unread. When the user selects this function, the note window will close and the icon appears on the record.
"Deactivate notifications"	Disables notifications for a given note for one, eight or 24 hours, or until the user reactivates them.  **Figure 48: Deactivate notifications** Records with notes for which the user has deactivated notifications do <u>not</u> appear in his/her inbox when a user adds a new message.
"Copy text"	Copies the entire note text.

Function	Purpose
“Open record”	Opens the record to which the note is linked.
“Delete note”	Deletes the note. Requires the “Can delete notes” privilege. F2 asks for confirmation when a user deletes a note.
“Leave note”	The user removes him/herself as a participant on the note.  **Figure 49: Leave note** **Note**: If a user removes him/herself from a note whose record has the “Involved” access level, the user may lose access to the record.

As with a chat, note participants receive permissions depending on certain conditions. Se the access levels in the section *The chat recipient’s record access level*.

Receiving a note

A note recipient will see the record to which the note is linked in his/her inbox. The  icon appears next to the record. The note may be read from the main window by hovering the cursor over the icon as shown below.

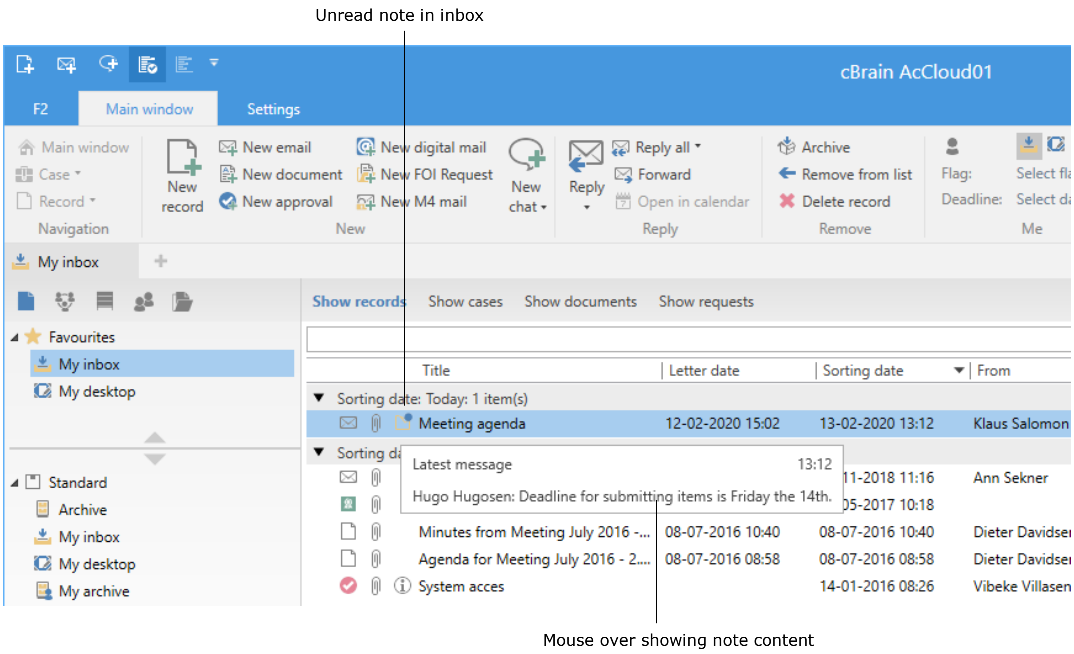


Figure 50: Unread note

Double-clicking the icon opens the note directly.

Notes can also be opened from the main window preview as shown below.

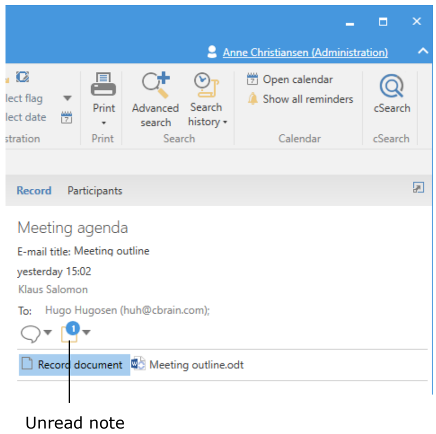


Figure 51: Open note from main window preview

In the record window the note is found above the document selector to the right, as shown below. Click the icon to view the note text as a drop-down box. Click the note text to open the note window.

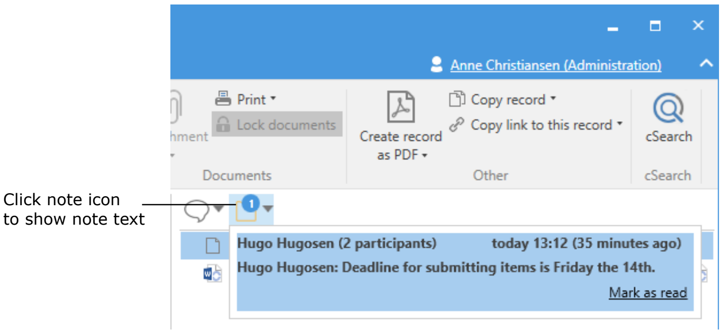


Figure 52: Note in record window

Allocation of responsibility

The allocation concept is a central feature of F2. It can be thought of as a digital version of an organisation's physical mail distribution in which incoming mail pertaining to formal cases are allocated to units or users without using the email function.

Organisations with a central postal unit scanning letters may have this unit allocate responsibility for letters to other units which in turn may allocate/distribute them to individual users. The selected unit or user will then have responsibility for the record.

The responsible participant

The allocation of responsibility typically means that the formal responsibility lies with a specific unit or user, the responsibility of the unit being derived from one of its users.

All records that are created in F2 or imported via an email system are born with an allocation of responsibility, either to the user or to the unit creating or receiving the record. The record manager can always allocate the responsibility of the record to another user or unit.

If responsibility for a record is reallocated, the record appears in the inbox of the newly appointed responsible user or unit.

> **Note**: When a user allocates the responsibility for a record to him- or herself, the record does not appers i tje user's personal inbox. To add a record to the personal inbox, click the icon in the record ribbon. For further information, see *F2 Desktop – Management and organisation*.

When the responsibility for a record is reallocated, the following happens:

- If a unit is inserted in the "Responsible" field, the record will appear in the unit's inbox and no longer appear in the user's "In process: Me" list.
- If a new user is inserted in the "Responsible" field, the record will appear in his/her inbox. F2 automatically adds the "Responsible unit" based on the user's affiliation.

This lets records whose responsibility rests with specific users appear in the "In process: Unit" list and makes it possible for users to sort F2's result list using the "Responsible unit" column.

Reallocating responsibility

In order to reallocate the responsibility for a record, it must be in editing mode. Enter a new user or unit in the "Responsible" field and click **Save**.

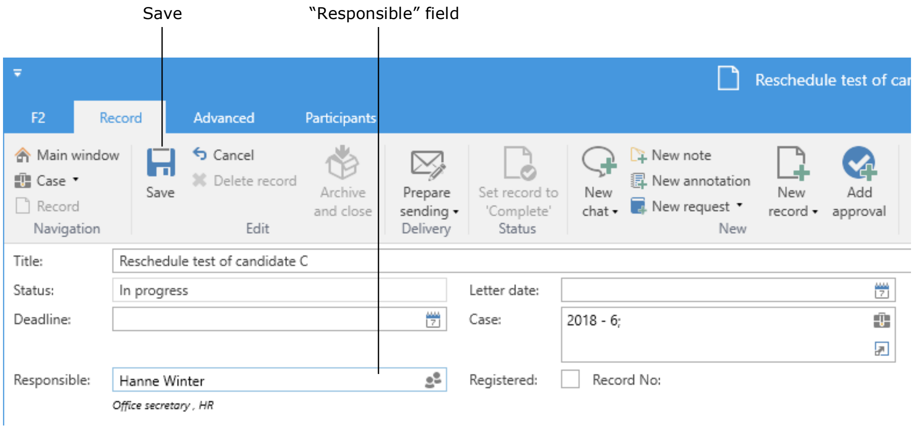


Figure 53: Reallocating responsibility

When the record is in editing mode, the icon appears in the "Responsible" field. Clicking on the icon opens F2's participant register in which a user or unit may be found via the "Choose participant" dialogue. For further information on this dialogue, see the section *The "Choose participants" dialogue*.

The record creator's access when reallocating responsibility

The record creator may lose write access when reallocating the responsibility. This happens when the responsibility for a record is reallocated to a user in another unit, for example. The new user receives full write access to the record, while the record creator only retains read access only. As a consequence, reallocating the responsibility of a record to another unit or user therein cannot be undone as the reallocating user loses write access to the record in the process.

However, if the user or unit in the "Responsible" field is removed, the full write access reverts back to the record creator. The "Participants" tab in the record window shows both the currently responsible user or unit as well as the record's creator.

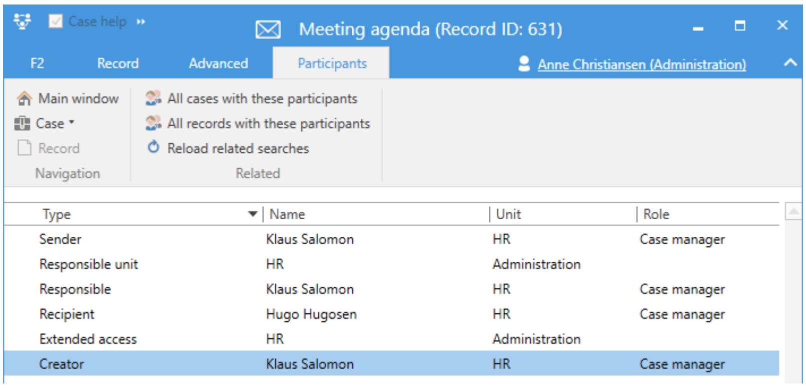


Figure 54: The "Participants" tab

Note: A user who is removed from a record's "Responsible" field will also lose read access if no other circumstances grants the user access. For records with the access level "Involved", this means that only the users/units currently involved in the record have read access to it.

Supplementary case manager

The "Supplementary case manager" field is used for appointing users, units, teams and/or distribution lists to assist with processing a record or case without being directly responsible. Any supplementary case managers remain unchanged when the responsibility for a record is reallocated.

Adding a supplementary case manager

In order to add a supplementary case manager, the record or case must be in editing mode. Add a user, unit, team and/or distribution list to the "Suppl. case mgr." field and click on **Save**.

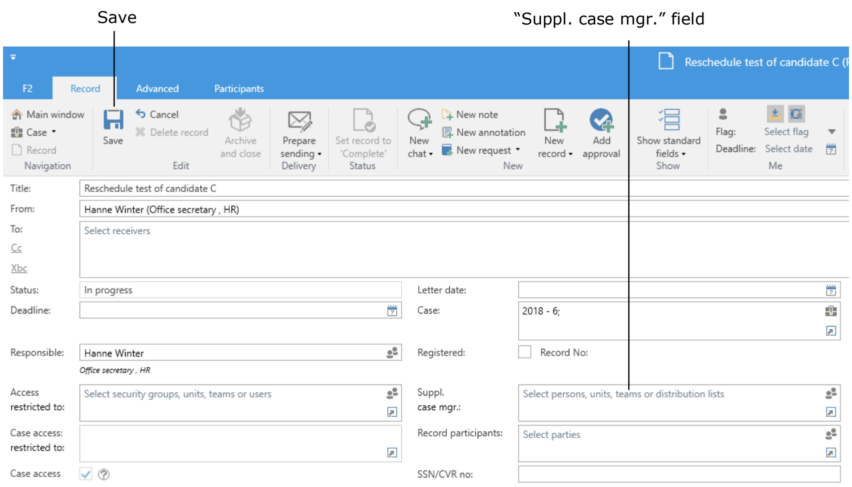


Figure 55: Add supplementary case manager to record

When a user or unit is added as a supplementary case manager to a record, it appears in the user's or unit's inbox.

Users will see the icon next to the record, indicating that they have been added as a supplementary case manager.

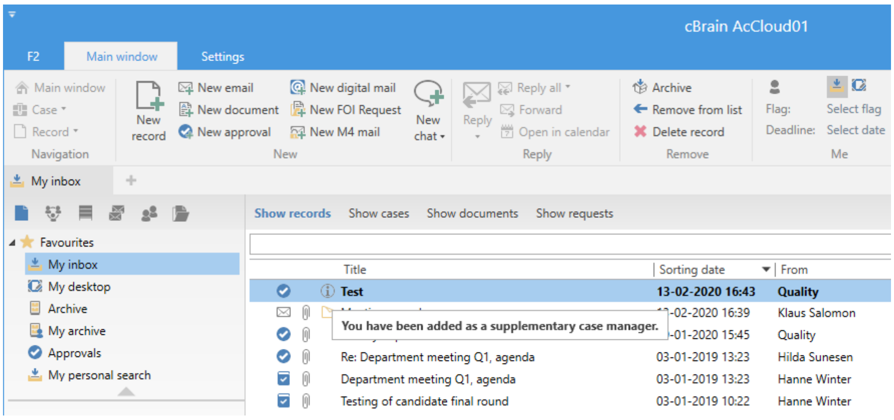


Figure 56: Supplementary case manager notification in inbox

Access levels for supplementary case managers

In the record window it is possible to add a user/unit/team/distribution list as a supplementary case manager.

The access level for a supplementary case manager is based on the level defined in the responsible user's F2 settings. By default, the access level for supplementary users and units is "Write access". For further information on personal settings, see the manual *F2 Desktop – Settings and setup*.

It is possible for the responsible user or unit to change a record's permissions. Three levels exist:

- **Read access**: Does <u>not</u> allow the supplementary case manager to edit the documents attached to the record or its metadata.
- **Write access to documents**: Allows the supplementary case manager to edit the documents attached to the record, but <u>not</u> its metadata.
- **Full write access**: Allows the supplementary case manager to edit both the documents attached to the record and its metadata.

A supplementary case manager's access rights can be viewed and changed by right-clicking the participant. In the context menu, select "Access rights for the record". Here, the current access level is shown and may be changed.

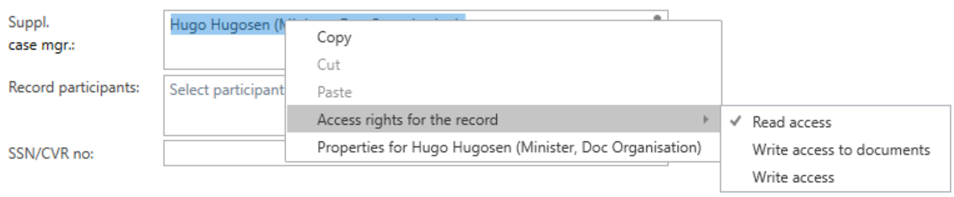


Figure 57: View access rights for supplementary case manager

Note: A user who is removed from the “Suppl. case mgr.” field on a record will also lose read access if no other circumstances grant the user access. For records with the access level “Involved”, this means that only the users/units currently involved in the record have access to it.

Adding a record to a case

Adding a record to an existing case

A record in editing mode can be added to a case by entering the case title or case number in the "Case" metadata field. When the user starts typing in the field, F2 starts searching for relevant cases.

It is possible to search for a case by clicking the icon in the "Case" metadata field. This opens the "Choose cases" dialogue from which the relevant case can be found. For further information on this dialogue, see the section *The "Choose cases" dialogue*.

When a case has been added to the "Case" metadata field, click **Save** in the record window ribbon. The record is then added to the case.

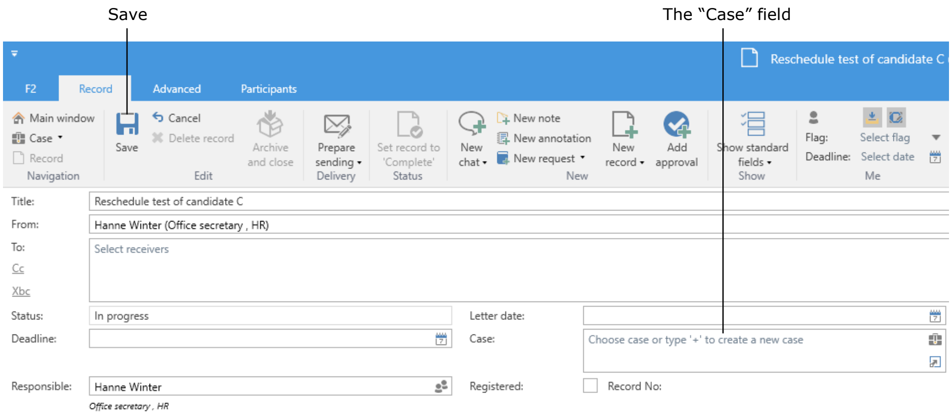


Figure 58: Add record to existing case

Adding a record to a new case

Creating a new case from the current record can be done in the following ways:

- Type "new" or "+" in the "Case" metadata field and press **Enter**. This opens the "New case" dialogue as shown below.
- Click the icon in the "Case" field. This opens the "Choose cases" dialogue. In this dialogue, click **New case**. For further information, see the section *The "Choose cases" dialogue*.

Both ways lead the user to the following dialogue:

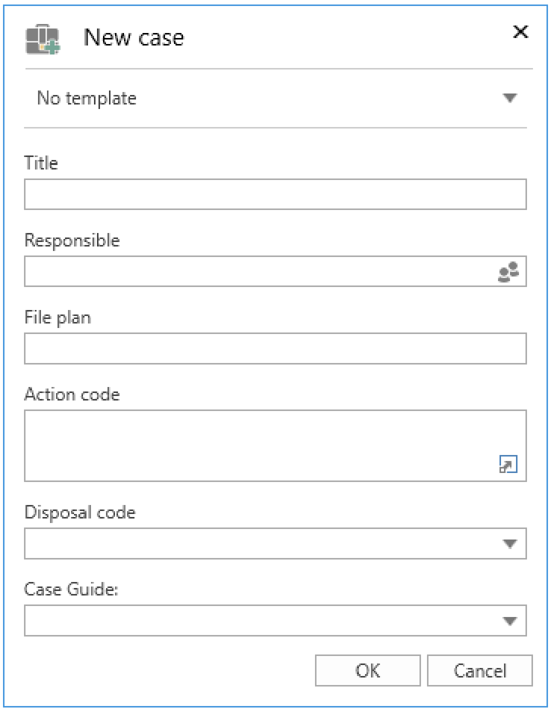


Figure 59: The "New case" dialogue

In the "New case" dialogue, the user enters the case title and other relevant metadata such as file plan, action code, disposal code or case guide (add-on). Depending on F2's configuration it may also be possible to choose a case template (add-on) that determines which metadata fields to fill in.

When the fields are filled in, click on **OK** to create the case. For further information on the case window and working with cases, see the manual *F2 Desktop –Cases*.

Note: Depending on F2's configuration and the organisation's guide lines, some fields may be obligatory. Certain fields may also be filled in automatically.

The "Choose cases" dialogue

Click the icon in the "Case" field on a record to open the "Choose cases" dialogue. This dialogue contains the same search options as F2's main window. These are used for adding one or more cases.

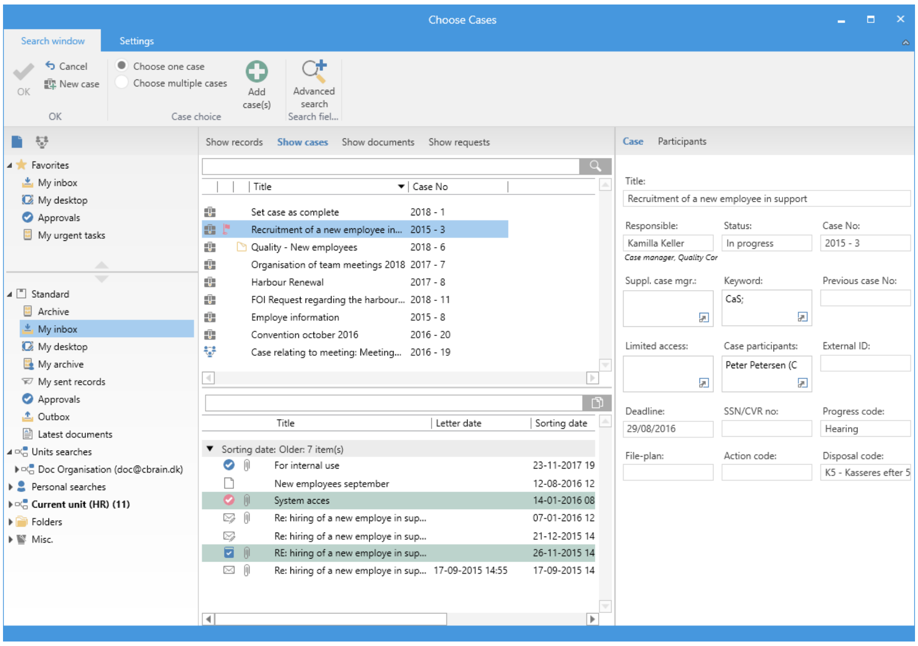
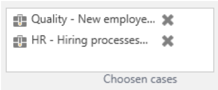
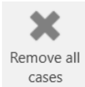


Figure 60: The "Choose cases" dialogue

The "Search window" tab in the dialogue ribbon offers the following options:

Function	Description
OK	Click on **OK** when one or more cases have been selected and are displayed in the "Chosen cases" field. The record is then added to the chosen case or copied to the chosen cases.
Cancel	Close the dialogue without adding the record to a case.
New case	Open the "New case" dialogue from which a new case can be created.
Choose one case Choose multiple cases	Search for one or more cases and add them via double-clicking, right-clicking or clicking on **Add case(s)** in the dialogue ribbon.
Add case(s)	Add the cases shown in the "Chosen cases" field in the dialogue ribbon. **Note**: When clicking on Add case(s), if the record is already added to a case, that case will be shown in the "Chosen cases" field along with any other selected cases.

	The "Chosen cases" field shows cases the user has selected. A case in this field may be removed by clicking the ✖ next to it.
	Remove all cases from the "Chosen cases" field in the dialogue ribbon.
	Perform an advanced search via metadata fields. For further information, see the manual *F2 Desktop – Searches*.

In the "Choose cases" dialogue the user can search for the cases to which the record must be added.

If the record must be added to a single case, select the case and double-click to transfer it to the record's case field.

If the record must be copied to multiple cases, click **Choose multiple cases** in the dialogue ribbon. Then search for the relevant cases and add them to the "Chosen cases" field. Click on **OK** to add the cases to the record's case field.

> **Note**: When clicking on **Add case(s)**, if the record is already added to a case, that case will be shown in the "Chosen cases" field along with any other selected cases.

If several cases have been selected, a copy of the record is added to the second case, the third case, etc. This is shown in the dialogue below which opens when the record is saved via the record window ribbon.

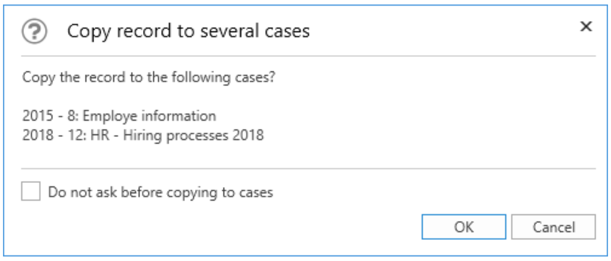


Figure 61: "Copy record to several cases" dialogue

Click on **OK** in the dialogue to copy the record to the selected cases.

To skip this dialogue in the future, tick the box next to "Do not ask before copying to cases" before clicking on **OK**.

> **Note**: A user may remove a record from a case and add it to another if he/she has full write access. A user may also remove a record from a case without adding it to a new case.

Records with copies on multiple cases

When a record has been copied to multiple cases, the user may view its copies in the record window. This is done by clicking on the icon next to the "Case" field.

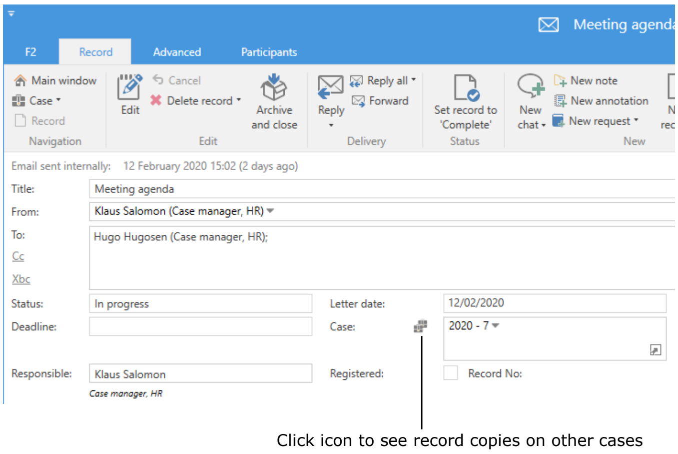


Figure 62: View record copies on other cases

The "Copy overview" dialogue will open, showing all cases to which the record has been added. The overview shows the following information:

- Case number
- Case title
- Record ID
- Record title
- Created (date)
- Created by (user)

The green highlight shows the record that is currently open.

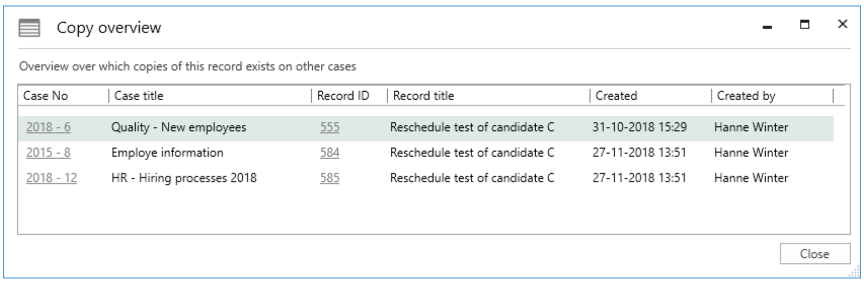


Figure 63: "Copy overview" dialogue

By clicking on either case number or record ID it is possible to access the case or record copy.

Record metadata

The visible record metadata fields depend on the user's personal settings. A record can be displayed with:

- Email metadata fields (i.e. metadata fields used when sending an email), see the section *Email delivery metadata fields*.
- Standard metadata fields, see the section *Standard metadata fields*.
- Advanced metadata fields, see the section *Advanced metadata fields*.

Adjust which metadata fields that are displayed by clicking **Show all fields** in the record window ribbon.

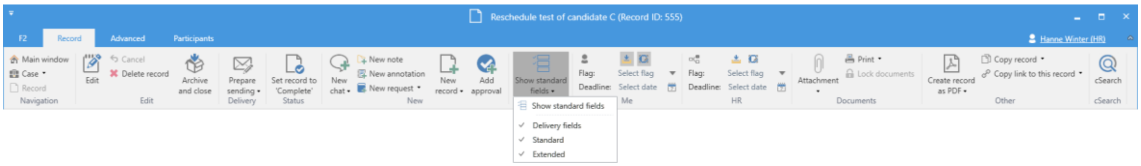


Figure 64: Show all record fields

Various metadata associated with a given record depend on its status and the user's rights.

The following sections describe the metadata fields and how certain record metadata are managed.

Email delivery metadata fields

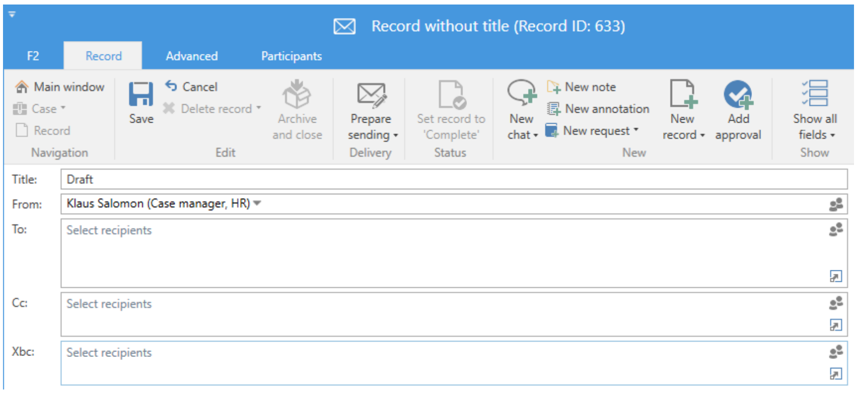


Figure 65: Email delivery fields

The email delivery metadata fields are described below. For further information on creating and sending email records, see the section *Email*.

Metadata field	Description
"Title"	The "Title" field is always shown. It is a text field describing the record. The user must enter a title when creating the record. The title may be changed later.

Metadata field	Description
	On an email record the title is identical to an email's subject field.
"From"	The sender of the email. This field is filled in automatically when the user starts typing in the "To" or "Cc" field.
"To"	Enter any recipients of the email record here.
"Cc"	Enter any Cc recipients of the email record here.
"Xbc"	Enter any Xbc recipients of the email record here. Adding an external participant here is similar to adding a recipient in Bcc in traditional email systems. **Note**: There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

Standard metadata fields

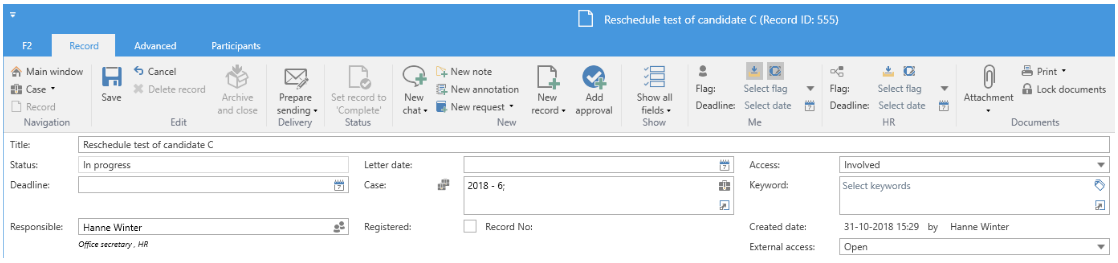
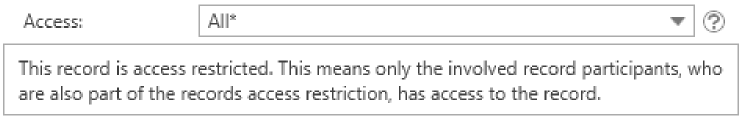


Figure 66: Standard metadata fields

The metadata fields shown on a record in non-expanded mode are reviewed below.

Metadata field	Description
"Title"	"Title" is shown in every metadata field view. It is a free text field describing the record. The user must enter the title when creating the record. The title may be changed later.
"Status"	The status of a record indicates whether it is "In progress" or "Completed".
"Deadline"	In this field a deadline is set on the record. This value is used e.g. in searches and for sorting lists.
"Responsible"	The "Responsible" field specifies the user or unit formally responsible for the record.

Metadata field	Description
"Letter date"	If the record has been sent or received, it has a letter date. This is the date on which the record was sent or received in F2. In case of a scanned physical letter, the user can add a letter date in this field, which should correspond to the date on the physical letter.
"Case"	If there is a case number in this field, the record has been added to a case. If the field is empty, it can be added to a case from here. If a record is already added to a case, it may be moved to another by replacing the case number. The user may also remove the record from a case if the he/she has the required rights. In order to remove a record from a case, delete the case number from the "Case" field. Adding the record to a new case is not required. If a record must be added to a known case, enter the case number or case title in this field. Then select the case and press **Enter** or double-click. For further information, see the section *Adding a record to a case*. A case contains its own set of metadata. For further information on cases, see the manual *F2 Desktop – Cases*.
"Registered"	In some public organisations, a tick in the "Registered" field means that the record will be included in deliveries to the National Archives or similar institutions. Private organisations may use this field to indicate particularly important records that may not be deleted. In addition this field, like any other record metadata, is used for miscellaneous searches, groupings, etc.
"Record no."	When a record is registered, a record number is allocated consecutively within a case. This means that only registered records added to a case have a record number.

Metadata field	Description
"Access"	Here the user selects the access level for the record: • Involved • Unit • All. If a record is subject to an access restriction in the "Access restricted to" or "Case access restriction to" fields, an asterisk "*" is shown in the "Access" field. Hovering the mouse over the icon displays the following information.  **Figure 67: Access restriction information** For further information on access levels for records, see the section *Record access.* **Note**: Records can be edited by users from the responsible unit or by users are involved in the record such as supplementary case managers.
"Keyword"	Here the user can add predefined keywords to the record. Keywords can be added in three different ways: • Start typing in the field, and F2 will search for matching keywords. If there are any keywords specific to the unit, only these will be shown. • Press the **down arrow** key to display a list of available keywords. If there are any keywords specific to the unit, only these will be shown. Press **Enter** or double-click to select a keyword. • Search all keywords. Click the icon in the "Keyword" field to open a dialogue showing all keywords available to the authority. From here, the user can select a keyword and add it to the right panel with the right arrow button. When clicking **OK**, the dialogue will close and the selected keywords will be added.

Metadata field	Description
"Created date"	This field shows the date when the record was created and by whom. **Note**: For incoming emails, the "Created date" denotes when the record was imported into F2.
"External access" (add-on)	This field is only used for marking the record in connection with customer-specific integrations. The values are taken from a value list and must be configured in cooperation with cBrain.

Advanced metadata fields

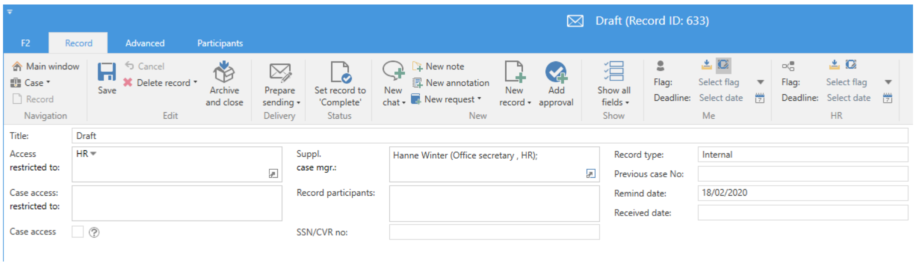


Figure 68: Advanced metadata fields on a record

The advanced record metadata fields are described below.

Metadata field	Description
"Title"	"Title" is shown in every metadata field view. It is a free text field describing the record. The user must enter the title when creating the record. The title may be changed later.
"Access restricted to"	Any access groups (users/teams/security groups, etc.) for the record are specified here. This field limits the access to the listed users and/or groups. Regardless of the record's general access level, only users/groups that have been added to this field can access the record. However, the access level is still in effect, which means that the user added to this field must *also* be included in the record's access level (e.g. as part of the "Involved" or by the record's access level being "All"). When the user adds an access restriction, the dialogue "Participants do not have access to the record" appears, notifying the user if other users or units will lose their access because of the restriction. This dialogue is also called the access assistant.

<table>
<tr><th>Metadata field</th><th>Description</th></tr>
<tr><td>“Access restricted to”</td><td>

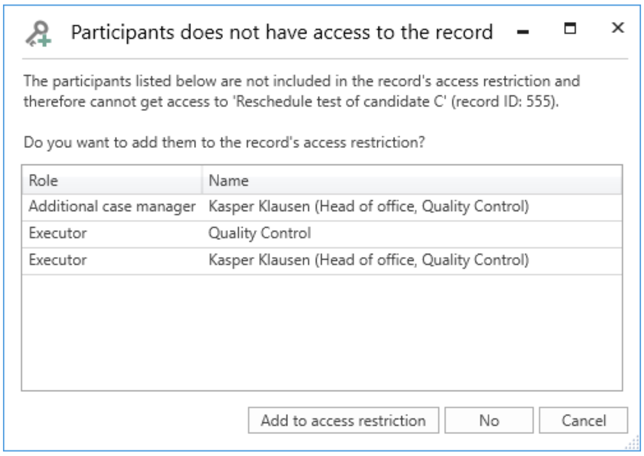


Figure 69: “Participants do not have access to the record”

It is possible to activate the access assistant for units. This configuration is made in cooperation with cBrain.

Note: When an access group is added or removed, the log will show which user made the change and when.

Note: If a user adds a security group to a record which already has one or more security groups, the number of users who can access the record will go up, not down.

Note: If a user with restricted access (in the user properties) is added to the “Access restricted to” field, either the authority or a unit must also be added to this field, and the “Access level” must be “All”. Otherwise, access to the record is reduced to a single user.

</td></tr>
</table>

Metadata field	Description
"Case access restricted to"	Here any access groups for the record's case is added. This field is empty unless the record is added to a case, "Case access" is ticked, and the case has an access restriction. If the above criteria are met, F2 automatically transfers the users, units, teams and/or security groups from the case access restriction to this field. **Note**: If a user with restricted access (in the user properties) is added to the "Access restricted to" field, either the authority or a unit must also be added to this field, and the "Access level" must be "All". Otherwise, access to the record is reduced to a single user.
"Case access"	If this box is ticked, the access restriction on the record's case is automatically transferred to the record. This means that an access restriction added to the case is applied to all its records. Next to the "Case access" field is the icon. Hovering the mouse over this icon will display the following text: "A checkmark in the 'Case access' box on the record indicates that the 'Case access restriction' on the record will be a combination of the access restriction between the record and the case." F2 can be configured to tick this box automatically.
"Suppl. case mgr."	Add any supplementary case managers on the record here. These are users, teams and/or units that help with the case proceeding without being responsible for the record. For further information on adding supplementary case managers, see the section *Adding a supplementary case manager*.
"Record participants"	Add participants other than the sender, recipient, case manager, supplementary case manager, and the responsible participant to the record.
"SSN/CVR no."	Add a SSN or CVR number to the case.

Metadata field	Description
“Record type”	Used to distinguish between records sent to external participants, received from external participants or for internal work. The following record types are available: • “Outbound” If an email record is sent to an external participant, the record type is automatically set to “Outbound”. • “Inbound” If an email record is sent from an external participant, the record type is automatically set to “Inbound”. • “Internal” All records for internal work and communication are automatically assigned the record type “Internal”.
“Previous case no.”	If the record was added to another case or exists in another system, the original case number is shown here. This field can also be filled in by the user.
“Remind date”	A remind date is a date used in connection with reminders that may be added to the record. This is to remind the user of taking action, e.g. following up on a record, in due time before its deadline expires. **Note**: The reminder date is not the same as a pop-up reminder, but is used as a basis for searches and for sorting lists.
“Received date”	This is the date when the record was received. This is set automatically if the record is sent electronically. If the record originated as a physical letter, it is possible to enter the received date manually. This is useful for distinguishing the date printed on the letter from the date it was received. If the record is sent electronically, a value identical to the letter date will be entered automatically in this field.
“Created date”	This field shows the date when the record was created followed by the name of the user who has created it. **Note:** For incoming emails, “Created date” is when the record was created in F2.

Metadata fields on a record with the unit casework line

A user is able to monitor the recipient’s processing of a sent record. This is done by ticking the “Unit line related to case processing” box on the “Advanced” tab in the record window before sending the record.

When a record is sent to an internal user or unit, the “Unit casework” is created for each recipient, both users and units.

The “Unit casework” line appears when the record is sent and is visible when the advanced metadata fields are shown.

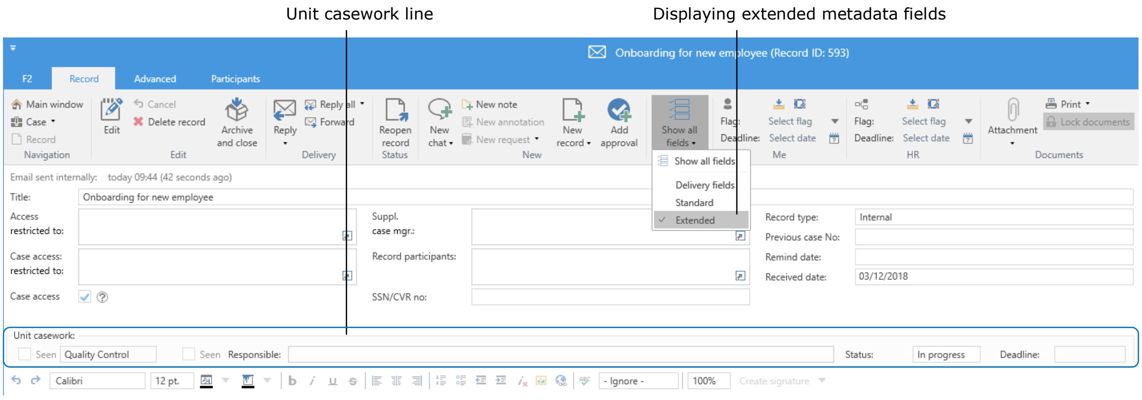


Figure 70: Record metadata fields including the unit casework line

For further information on using the unit casework line, see the manual *F2 Desktop – Management and organisation*.

The metadata fields of the unit casework line are described in the table below.

Metadata field	Description
“Seen” (by unit)	Indicates whether a user in the unit has seen the record.
“Seen” (by responsible user)	Indicates whether the responsible user has seen the record.
“Responsible”	The “Responsible” field specifies the user who is responsible for the record in the recipient unit. If a record is sent to a specific user, his/her unit is displayed here until he/she has seen the record.
“Status”	The recipient specifies the record status in the receipt registration. This informs the sender whether the record has been completed or is still in progress.

Metadata field	Description
“Deadline”	Here, the record recipient adds a deadline. Update the “Deadline” field by clicking on the icon to the right of the field or by entering the date in dd-mm-yyyy or a corresponding format. A user can also enter a date by typing e.g. “+10” to set a deadline 10 days from the current date. When the user leaves the field, F2 automatically changes the format to dd-mm-yyyy. Consequences of editing a deadline: The record will be included in the standard searches “Deadline tomorrow: Me” and “Deadline tomorrow: Unit” when appropriate.

The record’s documents

The following sections describe the elements of the record window in which documents are displayed and edited.

The record's document selector

To the right of the record metadata fields is the document selector which shows any documents attached to the record. This element is described in the section *Attaching documents.*

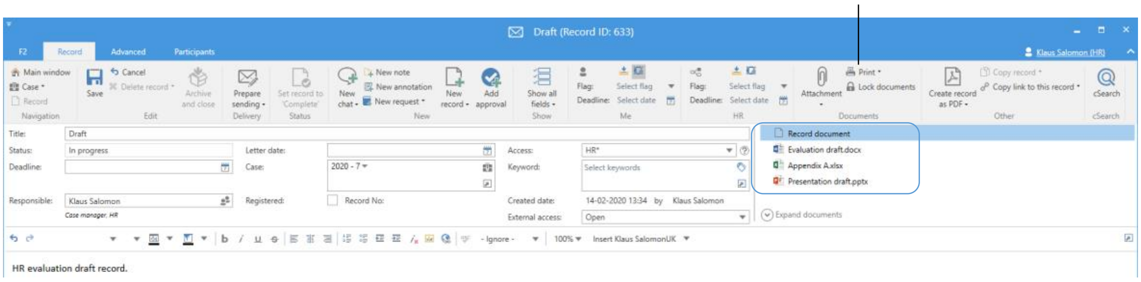


Figure 71: Document selector

When a document is chosen from the document selector, it is shown in the record editor pane. To edit a document, double-click on it to open its associated programme.

The “Documents” menu group offer menu items pertaining to the record’s documents. It is described in detail in the section *Menu items of the record ribbon*.

The order of the documents listed in the document selector can be changed by dragging one document to a location above or below another. This is useful to ensure the correct order of the attachments when printing the entire record as a PDF file.

If a record has many documents, the document pane may be expanded by clicking Expand documents. To minimise the pane, click Collapse documents.

The width of the document area can be adjusted using the mouse. By default, a given record window’s document area retains the width chosen by the user the last time a record of the same type was adjusted. This can be deactivated for each record view type in the “Setup” dialogue. For further information, see the manual *F2 Desktop – Settings and setup*.

The record editor

The record editor pane is shown below the record metadata fields.

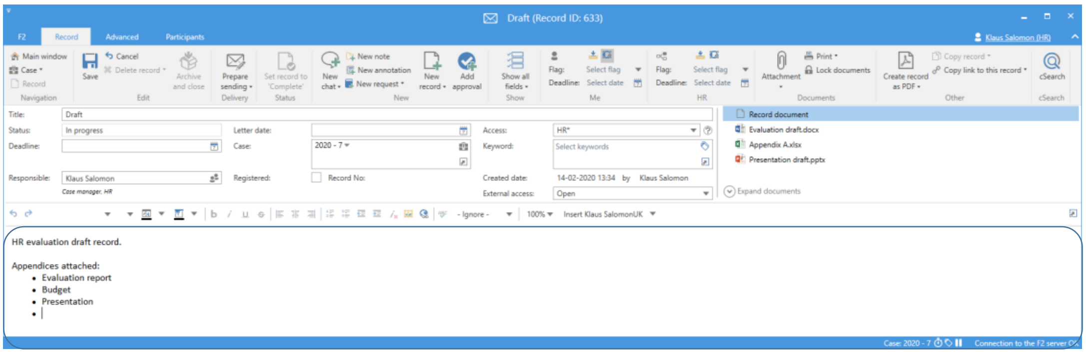


Figure 72: The record editor pane

This is a standard text editor with common functions such as font types, sizes, colours, etc. Here the user enters the text of the record document.

Note the following functions:

Icon	Name	Description
	Undo/Cancel undo	Clicking on the left arrow cancels the last action in the editor. Clicking on the right arrow cancels the last undo action. These functions work as long as the changes have not been saved.
	Add/Edit hyperlink	Add or edit a hyperlink in the editor. Clicking on  opens the “Add/edit hyperlink” dialogue. Here the user enters the text/title in the “Text display” field and the URL itself in the “URL” field. Clicking **OK** creates the text as a hyperlink in the record document. The record must be saved in order for the hyperlink to work.

Note: F2’s default configuration is the Calibri font with single line spacing.

Previewing attached documents

F2 generates a preview of all documents attached to a record. Select an attached document to display a preview in the record window’s editor pane.

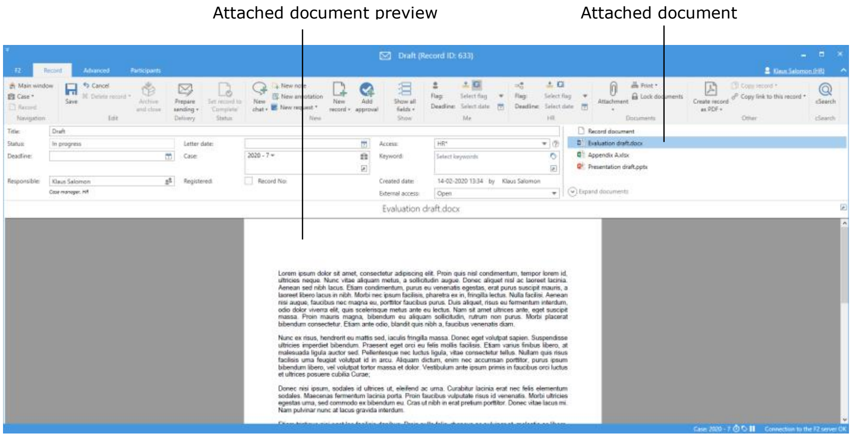


Figure 73: Preview of attached document

Note: When previewing Word documents, comments and changes in the file are also shown. These are also included when printing via PDF unless they are removed from the document.

Attached images are scaled down so the preview always shows them in full. See the example below.

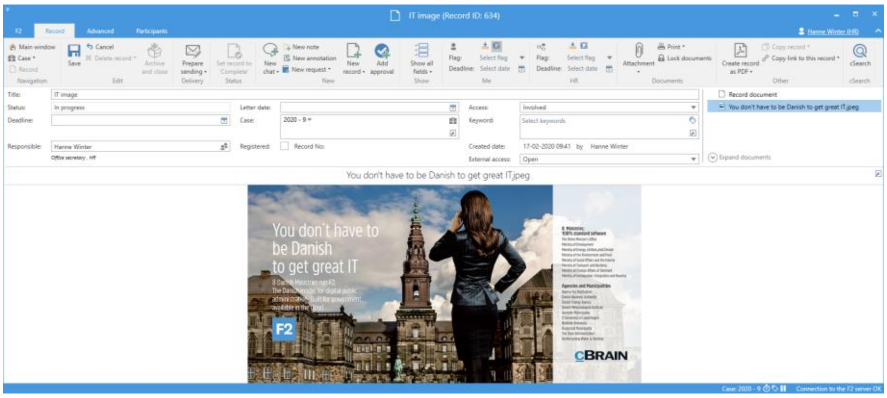


Figure 74: Image previews are scaled down to show entire image

Attachment icons

The icons representing attached documents depend on the programmes installed on the user's PC. F2 displays the icon for the default programme with which the file type is associated.

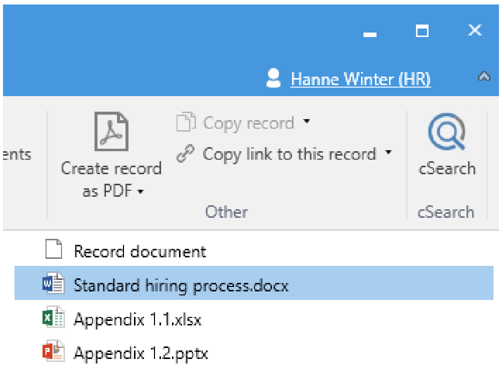


Figure 75: Attachment icons

Context menu for attachments

The user can right-click on an attached document to display its context menu, which is shown below:

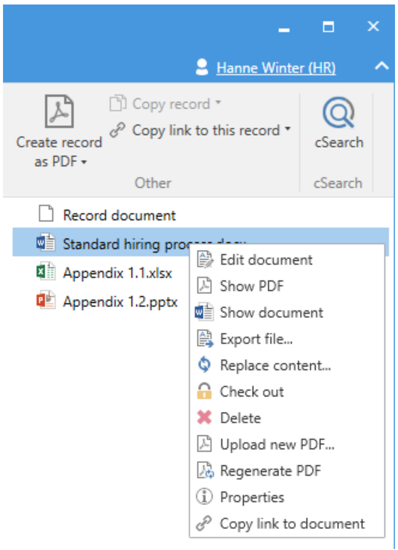


Figure 76: Context menu for an attachment

The following table describes the functions of the context menu.

Function	Purpose
"Edit document"	Available when the record is in editing mode and the user has write access to the record. This function opens the attached document in its associated programme, e.g. Word, Excel or PowerPoint. The user can edit and save the document in the opened programme. When the document is closed, the record is automatically updated.
"Show PDF"	Opens the document in PDF format.

Function	Purpose
"Show document"	Opens the attachment in its associated programme. The icon for this function shows in which programme the attachment will open. For example, a Microsoft Word icon will be shown for .docx files. The document will open in read-only mode.
"Export file…"	Opens a File Explorer window which lets the user save the document locally.
"Replace content"	Opens a File Explorer window which lets the user replace the attached document with another document. This function is available when the record is in editing mode.
"Check out"/"Check in"/"Cancel check out"	Enables the user to check out a document from F2 to a local folder and work on it offline. The document can be checked back into F2 when the work is done. The check-out process: • When in editing mode, right-click on a document and select "Check out". • The document is placed in a folder with the following path: %appdata%\cBrain F2\Check Out\{unique ID}\. • In the document selector, a padlock icon appears on document that has been checked out. The document is temporarily locked in F2. • If another user attempts to edit a checked-out document, F2 blocks the editing and displays an error message. • Right-clicking a checked-out document gives the user the option to **Check in** or **Cancel check out**. • If another user chooses **Cancel check out**, he/she can edit the document, but the user who checked out the document cannot check his/her version back into F2. • When a document is checked back in, F2 looks for the file in the folder: %appdata%\cBrain F2\Check Out\{unique ID}\ and updates the document attached to the record. The difference between "Export file" and "Check out" is as follows: • When using "Export file", it is up to the user to choose a location in which to save the file. Effectively, a copy is being made which F2 does not track. • When using "Check out", the document is copied to a specific F2 Windows folder with a unique ID within the "cBrain F2-Check out" folder, and F2 tracks this copy.
"Delete"	Deletes the attachment from the record.

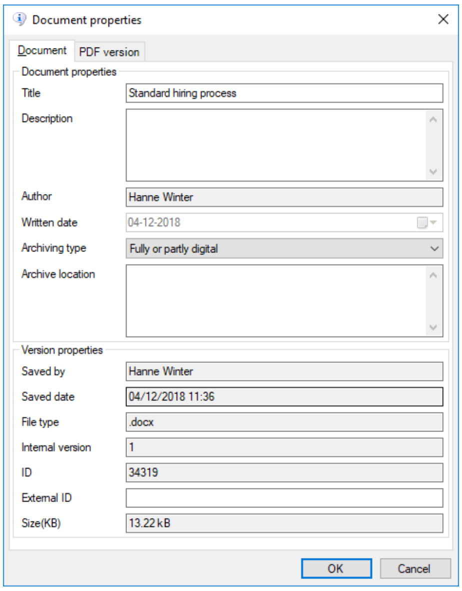
<table>
<tr><th>Function</th><th>Purpose</th></tr>
<tr><td></td><td>Only users with sufficient rights can delete an attachment, and the record must be in editing mode.</td></tr>
<tr><td>“Upload new PDF…”</td><td>Upload a PDF version of the attachment. This is used when an original document has restricted access, but it is necessary to have e.g. a summary that is accessible to all users.</td></tr>
<tr><td>“Regenerate PDF”</td><td>Forces the system to recreate the PDF version of the document. This may be useful if the PDF version looks different than expected.</td></tr>
<tr><td>“Properties”</td><td>Opens the dialogue below to show the document’s properties. If the record is in editing mode, it is possible to edit e.g. the document’s title and add information on its archiving type and archival location.


Figure 77: “Document properties” dialogue

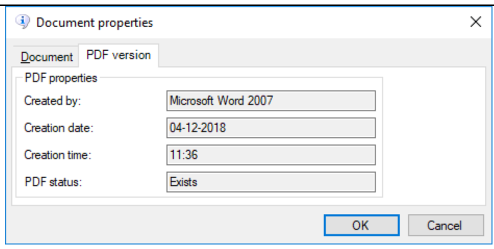
In the “Archiving type” field, the user can indicate whether the document is fully digital (and 100% archived in F2) or whether parts thereof (or possibly its full content) exists in a physical version. This may be the case with large books unsuitable for scanning.

The options are “Fully or partly digital”, “Paper” and “Not relevant”.

For documents of the “Fully or partly digital” and “Paper” archiving types, the user can add further information about the physical location of the document in the “Archive location” field, e.g. “Archive, shelf 4, row 5.”

The “Size (KB)” field denotes the file size.

The “PDF version” tab shows the details of the PDF version of the attachment.</td></tr>
</table>

Function	Purpose
	 **Figure 78: Document properties for PDF version** This tab shows whether the PDF version was created by F2 or if a version was uploaded by a user, its creation date and time, and a status for the PDF generation of the attachment.
"Copy link to document"	Copies a link to the document to the clipboard.

Menu items of the record ribbon

Menu items for working on the record are found on the record ribbon.

Many functions pertaining to a record depend on its status and the user's access level.

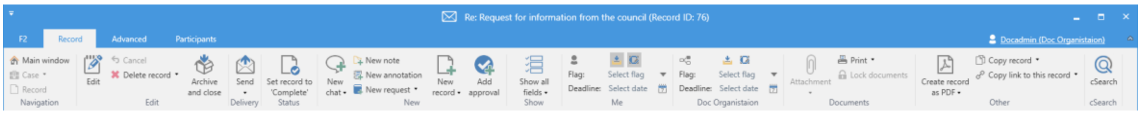
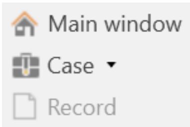
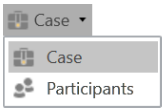
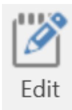
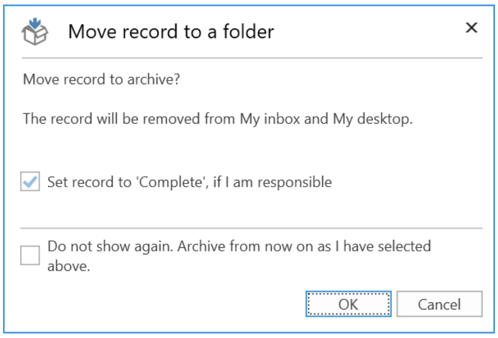
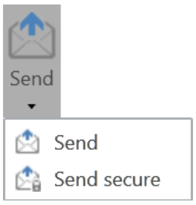
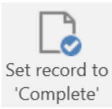
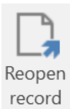
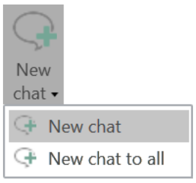
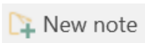
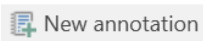
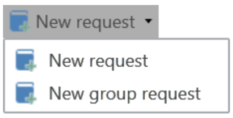


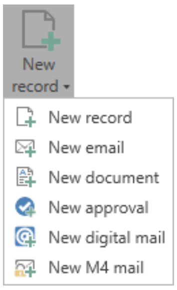
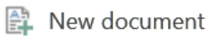
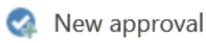
Figure 79: Menu items of the record ribbon

The table below describes the menu items of the record ribbon.

Menu item	Function
	Navigate between the main, case and record windows by clicking one of them. By clicking the drop-down arrow next to "Case", it is possible to navigate to the case participants.  **Figure 80: Drop-down menu for "Case"** It is possible to open the case and participant windows from the record window even though the record is in read-only mode. The "Record" menu item is available when the user has selected either the main or case window.
	When a record is in read-only mode, the user may click the **Edit** button to make changes to the record document, its attachments and its metadata fields. When a record is in editing mode, the "Edit" icon is replaced with the "Save" icon below.
	The user may save changes to the record document, its attachments or its metadata fields by clicking Save. The record cannot be saved if a validation error is found. This error occurs e.g. when an invalid value has been entered into a metadata field. The field will turn red and the "Save" button becomes inactive.

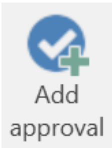
Menu item	Function
Cancel	Cancel any changes made to the record document, its attachments or its metadata fields.
Delete record	Depending on whether the record has been shared, "Delete record" works in two different ways. When the user deletes a record, F2 asks the user to confirm this action. Users with the "Can delete shared records for everyone" privilege have the option to "Delete for everyone" via a drop-down menu.  **Figure 81: Drop-down menu for "Delete record"** For further information on deleting records, see the section *Delete record*.
Restore record	This menu item is visible when a record has been deleted and then opened from the "My deleted records" list. Before a record is restored, F2 asks the user to confirm this action.
Archive and close	This button helps the user "tidy up" the record by removing it from the user's inbox and desktop. If the user has the responsibility for the record, the record's status can be changed from "In progress" to "Completed". When the user archives a record, the following dialogue appears.  **Figure 82: "Move record to a folder" dialogue**

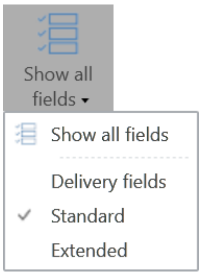
Menu item	Function
	Click “Prepare sending” to display the delivery metadata fields used for sending the record as an email. When adding a recipient, this menu item changes to either “Send” or “Send secure”, depending on the configuration. For further information, see below.
	The “Send” menu item is used to send an email record (internally or externally). “Send secure” is an add-on module with which an email record can be sent from F2 with encryption. This presupposes that the organisation has a third party provider to sign and encrypt the email records that F2 marks as “Send secure”. Email records sent securely are marked with the  icon.
	Changes the record’s status from “In progress” to “Complete”. When the record is completed, this menu item changes to “Reopen record”, which is described below.
	Reopen a record. Changes the record status from “Complete” to “In progress”.
	Open the chat window from which a new chat can be added to the record. By clicking the drop-down arrow, the user can select “New chat to all” which automatically adds all the record’s internal participants to a new conversation. For further information on chats, see the section *Chat*.
	Open the note window from which a new note can be added to the record. For further information on notes, see the section *Notes*.
	Open the “New annotation” dialogue. For further information on notes, see the section *New annotation*.
	Open the “New request” dialogue from which a new request can be created. Select either a regular request or a group request via the drop-down menu. A group request is a request sent from one authority to another and requires an add-on module. For further information, see *F2 Request – User manual*.

Menu item	Function
	Click on **New record** to open the "New record" dialogue. For further information on this dialogue, see the section *Creating a new record*. Click the drop-down arrow to open a menu with the following items: • New record • New email • New document • New approval (add-on module) • New digital mail (add-on module) • New M4 mail (add-on module) Each menu item creates a new record whose metadata are adjusted according to the selected type. The menu items are described below.
	Open a new email record with the user as sender. For further information on creating and sending emails, see the section *Email.*
	Open the "New document" dialogue from which a document template can be selected. This creates a new record with an attached document based on the selected template. This document will open so the user can work on it, while its record opens in the background. For further information on the "New document" dialogue, see the section *Attach from template*. **Note**: The newly created record inherits the title from the attached document.
	Open the "New approval" dialogue from which a new record with an approval can be created. F2 Approvals is an add-on module. For further information, see *F2 Approvals – User manual*. The "New approval" dialogue offers the same options as when creating a new record. These are described in the section *Creating a new record*.
	Open the "New digital mail" dialogue from which a new digital mail can be created. Requires the add-on module F2 Digital Mail (e-Boks). The "New digital mail" dialogue has the same options as the "New record" dialogue. These are described in the section *Creating a new record*.

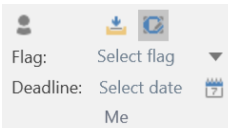
<table>
<tr><th>Menu item</th><th>Function</th></tr>
<tr><td>
</td><td>Open the “New M4 mail” dialogue from which an M4 mail can be created.

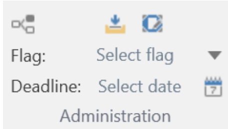
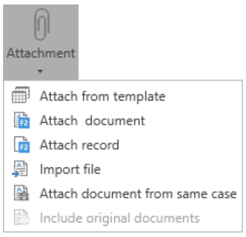
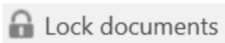
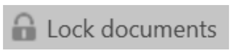
Requires the add-on module F2 Digital mail (M4).

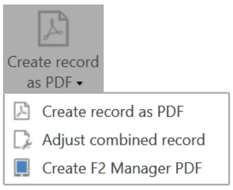
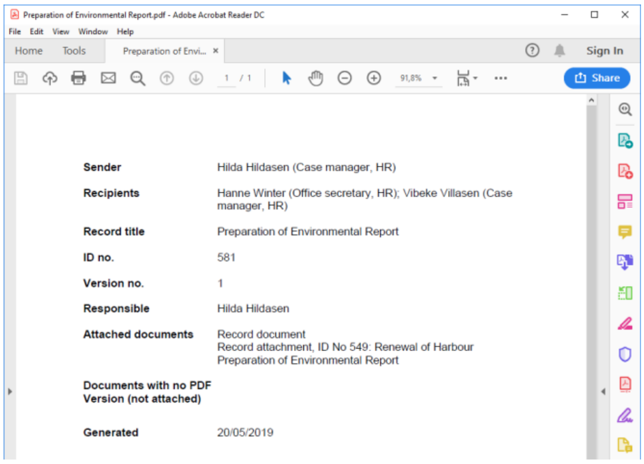
The “New M4 mail” dialogue has the same options as the “New record” dialogue. These are described in the section Creating a new record.</td></tr>
<tr><td>
</td><td>Add an approval to an existing record.

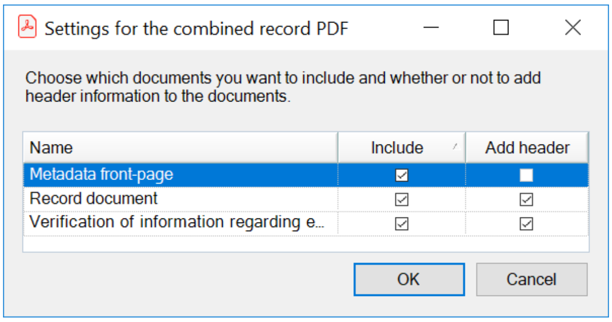
F2 Approvals is an add-on module that aims to facilitate the process of approving work material. For further information, see F2 Approvals – User manual.</td></tr>
<tr><td>
</td><td>Select which metadata fields to display in the record window.

When opened, a record is shown with the metadata fields specified on “Record view” via the “Setup” menu item on the “Settings” tab in the main window. For further information, see the manual F2 Desktop – Settings and setup.

The “Show all fields” drop-down menu lets the user choose between the following groups of metadata files:
Delivery
Standard
Extended.
These fields are described in the section Record metadata.</td></tr>
<tr><td>
</td><td>A user has several managing options for records in F2:
Placing record
Flagging a record
Deadline for a record.
These options are described in further detail in the manual F2 Desktop – Management and organisation.</td></tr>
</table>

Menu item	Function
	A user has several managing options for records on behalf of his/her unit in F2: • Unit's placement of a record • Unit's flagging of a record • Unit's deadline for a record. These options are described in further detail in the manual *F2 Desktop – Management and organisation*.
	Open the "New document" dialogue from which the user can add a document template to the record. Clicking the drop-down arrow opens a menu with the following menu items: • Attach from template • Attach document • Attach record • Import file • Attach document from same case • Include original documents. The menu items are described in the section *Attaching documents*.
	Two print options are available for a record: • "Print": Use this option to print only the record document and its metadata. "Print attachment": Use this option to print one of the record's attached documents. This menu item is only active if the user has selected an attachment.
	Click to lock the record's documents temporarily to prevent them from editing. When a record's documents are locked, this menu item changes to a darker colour:  **Figure 83: Documents are locked** Locked documents cannot be edited until they are unlocked by the same user or another user with write access to the record. The locked state cannot be changed if the record has been sent or received as an email. In this case, the menu item is deactivated:

Menu item	Function
	 **Figure 84: Documents cannot be unlocked** **Note**: Locking a record's documents includes the record document itself.
	Create a PDF version of the record and its attachments. Click the drop-down arrow to display a menu with the following items: • Create record as PDF • Adjust combined record • Create F2 Manager PDF. The created PDF will open automatically in the programme associated with PDF files. **Each menu item is described below.**
	F2 creates a joint PDF file containing a standard front page, the record document and any attachments. Each page of the PDF contains a header displaying the title and number of the record and the attachment. The first page of the PDF contains certain record metadata:  **Figure 85: PDF file created from record**

Menu item	Function
Adjust combined record	Opens the "Settings for the combined record PDF" dialogue. Here the user selects which documents to include and whether a header for each should be included.  **Figure 86: "Settings for the combined record PDF" dialogue**
Create F2 Manager PDF	Displays the record as it will appear on F2 Manager on iPad. **This function is only available as a part of the F2 Manager add-on module. For further information on this, see *F2 Manager – User manual*.**
Copy record ▾ Copy record Copy to another case Merge to case parties	"Copy record" contains three menu items: • Copy record • Copy to another case • Merge to case parties. For further information on copying records and merging to case parties, see the section *Copy record.*
Copy link to this record ▾ Copy link to this record Copy record ID	Link one record to another via either title or ID. "Copy link to this record" copies a link to the clipboard and can be pasted into another record document. The link will be displayed as the record's title. **Note**: When clicking a copied link, make sure that only one instance of F2 is running. Otherwise F2 may attempt to open it in the wrong instance. Additionally, the record to which the link refers cannot be in editing mode when the link is used. "Copy record ID" copies the record ID to the clipboard which can then be pasted into e.g. a record document, a chat or a search field.
cSearch	Opens cSearch, an advanced, intelligent search engine for F2. cSearch is an add-on module. For further information, see *F2 cSearch – User manual*.

The record ribbon functions

This section describes selected functions of the menu items in the record ribbon.

Delete record

The function of the “Delete record” menu item depends on whether the record has been shared.

A record is defined as shared if the creator has involved another user on it, or if another user has searched for and opened the record.

Involving another user may happen through e.g. a chat, emailing the record, reallocating responsibility or adding a supplementary case manager.

A record with the access level “All” or “Unit” is only defined as shared if it has been opened by a user other than its creator. Once a record has been shared, it cannot be deleted even if the means by which it was shared, e.g. a chat, is deleted.

F2 asks for confirmation before the user deletes a record.

The record cannot be deleted if:

- The user does not have full write access for the record.
- The record is in editing mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
    - The record is attached to a case.
    - The record has been registered.

The tooltip for the “Delete record” button will explain why deleting the record is not possible.

Hover the cursor over the “Delete record” button to view the tooltip.

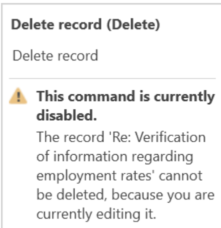


Figure 87: Example of “Delete record” tooltip

Deleting unshared records

Unshared records can be deleted from F2.

If the record has not been shared, clicking **Delete record** has the following consequences:

- The record is removed from all lists and personal folders.
- The record is transferred to “My deleted records” from which the user is able to restore it or delete it permanently.

Note: When deleting a record, it is removed from all lists, including the "Archive", and can only be found in "My deleted records". The record is kept there for 30 days after which the deletion is permanent. The 30-day period can be adjusted to accommodate the needs of the organisation.

Deleting shared records

Only users with the privilege "Can delete shared records for everyone" are able to delete shared records.

If the record has been shared, clicking **Delete record** has the following consequences if the user does <u>not</u> have the aforementioned privilege:

- The record is removed from "My inbox", "My desktop" and any lists created therefrom.
- The record is transferred to "My deleted records" from which the user is able to find any records that he/she has deleted.
- The record stays in the "Archive" and may still be found via searches therefrom.
- Any other users with whom the record has been shared are still able to see it on their lists.

Delete for everyone

The "Delete for everyone" menu item is used to delete a record even if it has been shared. Only users with the "Can delete records for everyone" privilege have access to "Delete for everyone". For other users the menu item is invisible.

Figure 88: "Delete for everyone" menu item

"Delete for everyone" is found in the drop-down menu for "Delete record". Using this, a shared record can be deleted.

The following conditions will block deletion of a record for everyone:

- The user does not have full write access for the record.
- The record is in editing mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
    - The record is attached to a case.
    - The record has been registered.

Clicking **Delete for everyone** has the following consequences:

- The record is transferred to "My deleted records" from which the user is able to find any records that he/she has deleted.
- The record is removed from all other lists, including the "Archive".

- The record may still be found through “Search all over” by users with access to the record before it was deleted.

Deleting a record permanently

A user with the “Can delete records for everyone” privilege can delete records permanently. Other users may only delete unshared records.

To permanently delete a record, go to the main window. From here, select the “My deleted records” list.

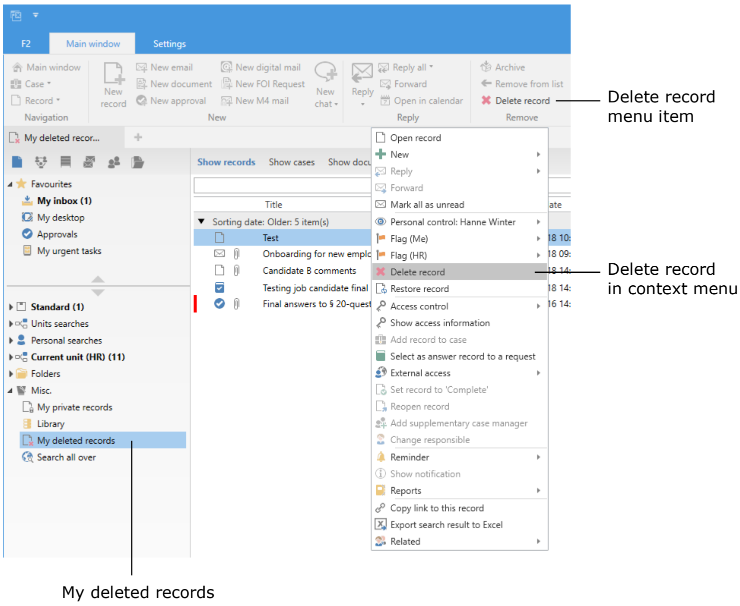


Figure 89: Delete record from “My deleted records”

Select the record and click the **Delete record** menu item in the ribbon, or either right-click to open the context menu and delete the record from there.

F2 asks for confirmation before the user deletes a record.

Save unsaved changes when starting F2

If changes have been made to records that were not saved the last time F2 was open, it is possible to save the changes when F2 is reopened. In this case, the dialogue below appears, and the user must choose whether to save or discard these changes.

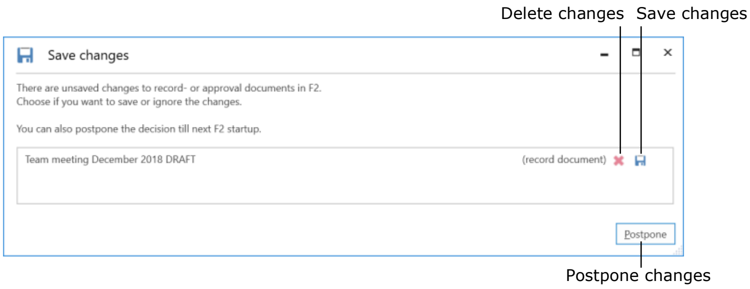


Figure 90: Save changes on restart

In addition to saving or discarding the changes, the user may postpone the decision. Next time the record or approval document is opened, F2 will ask the user to either save or discard the changes.

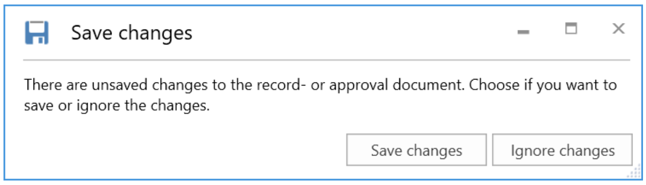


Figure 91: Save changes to record or approval document

New annotation

An annotation is a formal, permanent comment added to a record. It is used e.g. when senior employees certify employee records or when employees wish to add formal information to a record.

Clicking on **New annotation** opens the dialogue below.

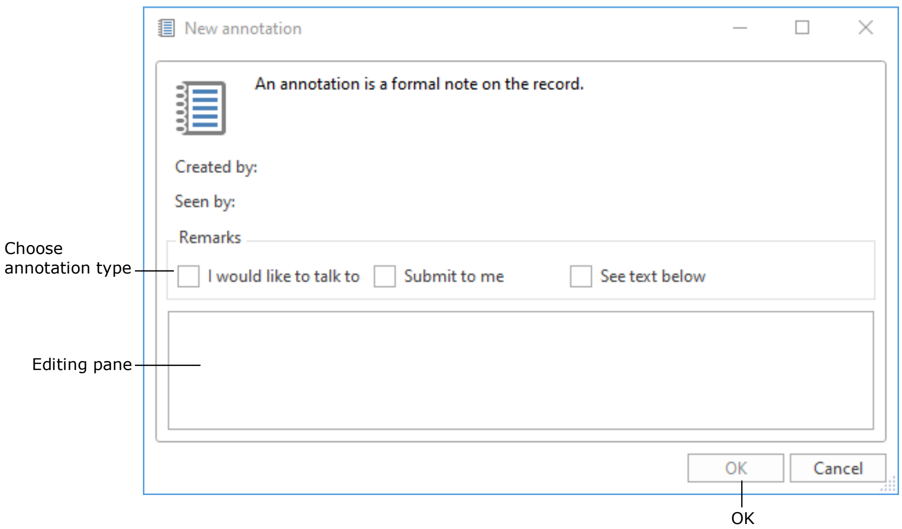


Figure 92: "New annotation" dialogue

In the editor pane, an annotation text can be added. Tick one or more of the annotation boxes as appropriate. The annotation types can be configured and are maintained by a user with the "Value list administrator" privilege. This means that the content of the dialogue may vary.

Save the annotation by clicking **OK**.

Annotations are shown above the document selector. Unread annotations are represented with the icon.

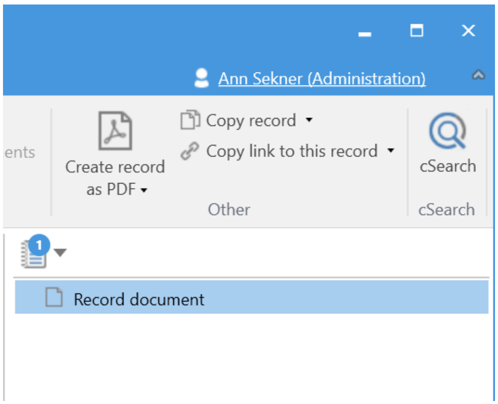


Figure 93: Annotation on record

The annotation is visible to all users with access to the record. Unlike chats and notes, users cannot be added to annotations.

An annotation is a formal communication and cannot be deleted from the record. For organisations which deliver documents to the National Archives or a similar institution, the annotation will be part of the delivery.

Accessing an annotation

An annotation can be accessed from both the main window and the record window. Clicking the annotation icon displays the annotation text, and clicking this text opens the annotation dialogue.

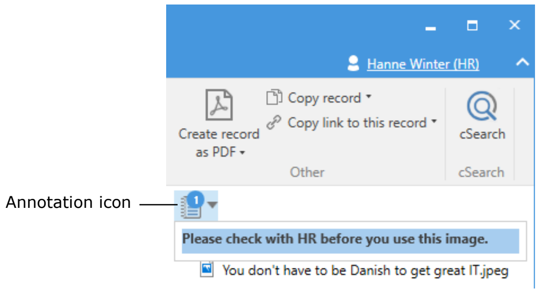


Figure 94: View annotation

In the main window, it is possible to open the annotation directly. This is done by double-clicking the annotation icon in the result list or by opening it from the preview.

Hover the cursor over the annotation icon in the result list to view the annotation's text.

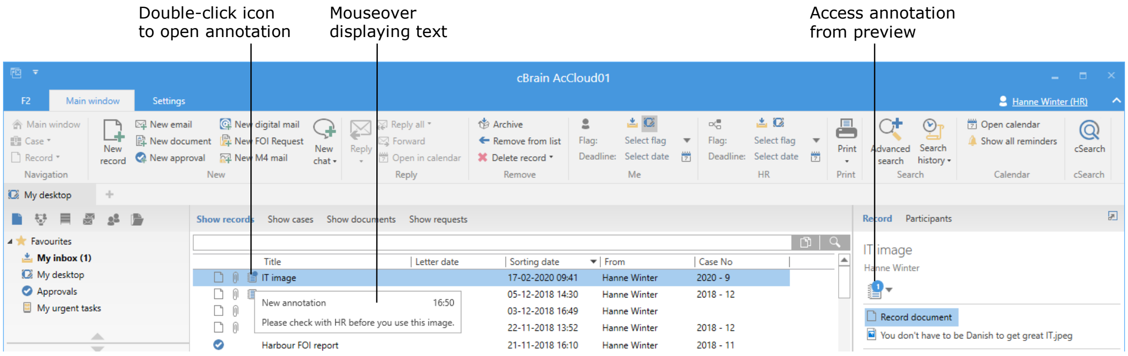


Figure 95: Access annotation from the main window

By clicking **Save and seen** in the annotation window, the annotation is saved and marked as read.

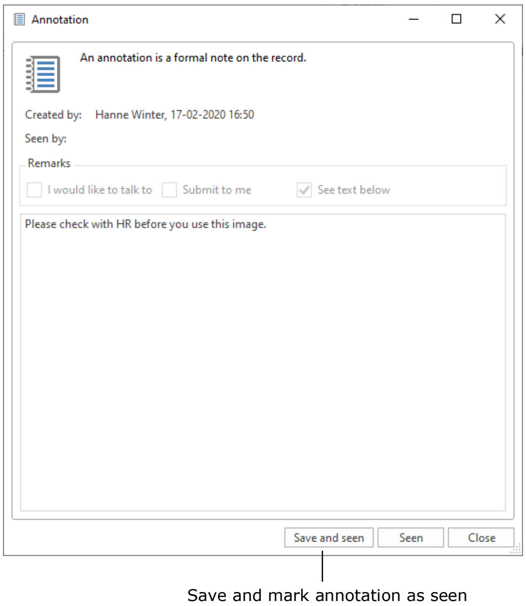


Figure 96: "Save and seen"

Note that the record must be in editing mode for this function to be available. This action is then registered automatically at the top of the annotation window.

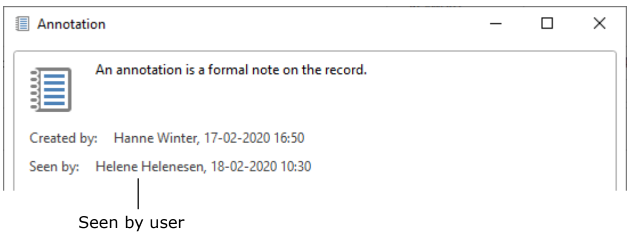


Figure 97: Annotation see by user

Attaching documents

This section describes the options for attaching documents to a record. Managing and working with documents are described in the section *The record's documents*.

The user may add one or more attachments to a record, e.g. Word, Excel or PowerPoint files. Besides these, other records can also be added to a record.

The figure below depicts a record with four attached Office documents and a PDF record attachment.

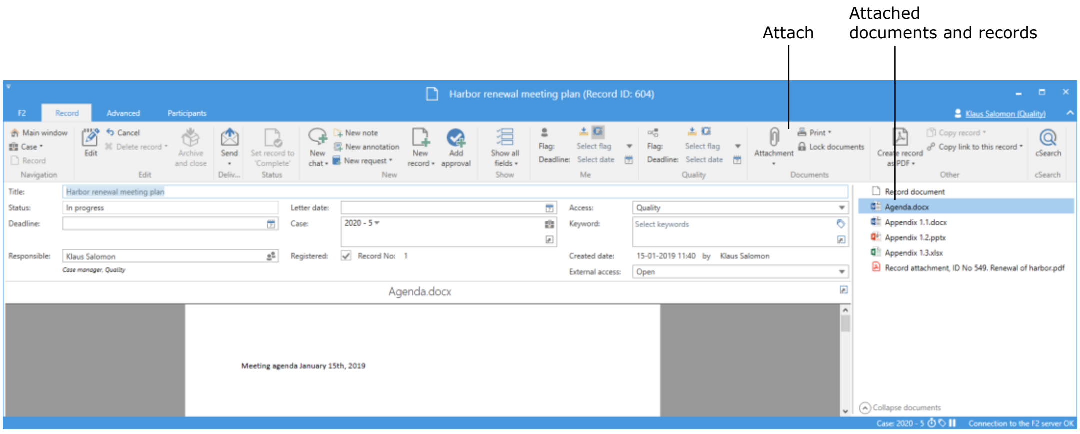


Figure 98: Documents and a record attached

Attachments are added via the "Attachment" menu item in the record ribbon.

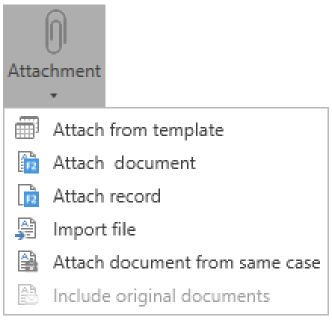


Figure 99: "Attachment" menu item

The "Attachment" drop-down menu contains the following options:

- Attach from template
- Attach document
- Attach record
- Import file
- Attach document from same case
- Include original documents.

These options are described below.

Attach from template

All users may create document templates. Shared templates and unit templates are created by users with the "Template administrator" privilege.

Figure 100: "Attach from template"

Use "Attach from template" to create new Office documents directly from the record. Creating documents this way will help F2 track them, since they will already be attached to a record.

Click to open the "New document" dialogue which shows all available document templates.

In this dialogue, the user can choose between personal and shared document templates as well as sort them by type, e.g. text or spreadsheet templates.

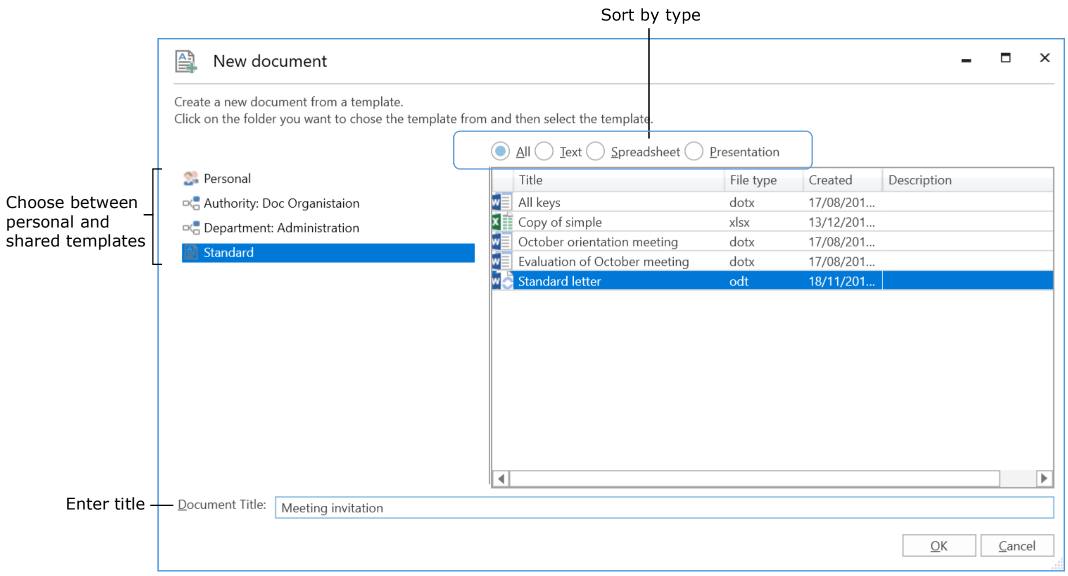


Figure 101: Select document template

Choose a document template in the dialogue. Enter a title and click **OK**.

If the user has selected a text document, Word or another text editor will open. The user can then work on the document as if they had opened the programme directly.

Note: The programme that opens depends on the file associations on the user's computer.

Note: Since the document is attached to the record, the user only needs to work in the programme and save the work there. F2 will automatically update the record with the document's changes.

Note: Even if the associated programme crashes, the user will not lose his/her work since F2 regularly saves a version of the document.

Attaching a document from F2

The "Attach document" menu item lets the user search and copy attachments from other records to the open record.

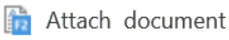


Figure 102: "Attach document"

Clicking "Attach document" opens the "Choose documents" window which has the same search options as the main window. Use these to attach one or more documents.

Select **Show documents** above the result list. When a document is selected, a preview appears in the right side of the window.

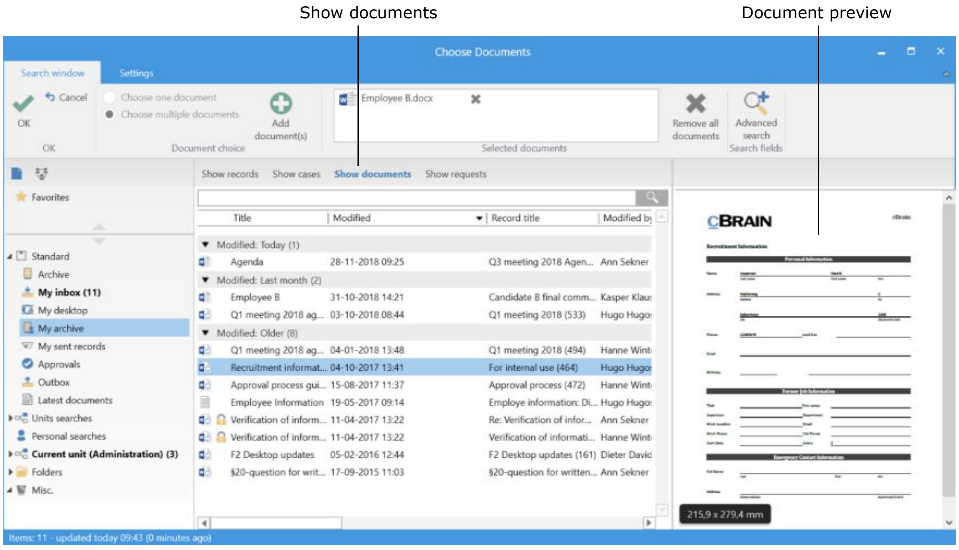
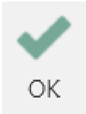
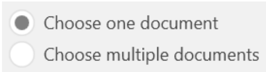
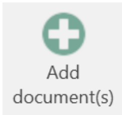
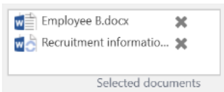
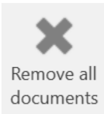


Figure 103: "Choose documents" dialogue

To attach a single document to the record, double-click it in the list. The document is then copied and attached to the open record.

To attach multiple documents to the record, click **Add document(s)** in the search window's ribbon. Find the wanted documents and add them to the "Chosen documents" field. Click **OK** to copy and attach the documents to the record.

The "Search window" tab offers the following options:

Function	Description
	When one or more documents have been added to the "Selected documents" field in the window ribbon, click **OK** to attach them to the record.
	Exit the window without attaching any documents.
	Choose to attach one or several documents. If the user adds more than one document to the "Selected documents" field, the "Choose multiple documents" option is automatically selected.
	Adds the documents that have been selected. These can be seen in the "Selected documents" field in the window ribbon.
	The "Selected documents" field shows the documents selected by the user. To remove a document from the field, click the ✖ next to its name.
	Removes all documents in the "Selected documents" field in the window ribbon.
	Perform an advanced search using metadata fields. For further information on advanced searches, see the manual *F2 Desktop – Searches*.

Note: Record documents from other records can also be attached, but these attachments <u>cannot</u> be edited.

Select and copy multiple documents to a record

It is possible to copy multiple documents to a record by selecting them in the main window and dragging them to the record.

Arrange F2's main window and the record window to which the documents must be copied next to each other as shown below. The record must be in editing mode.

Then select a list, e.g. "My inbox", and click "Show documents" to view the documents of the selected list.

Select the documents to copy to the record and drag them with the mouse from the main window to the record window as shown below.

Drop the documents in the document selector to add them as attachments to the record.

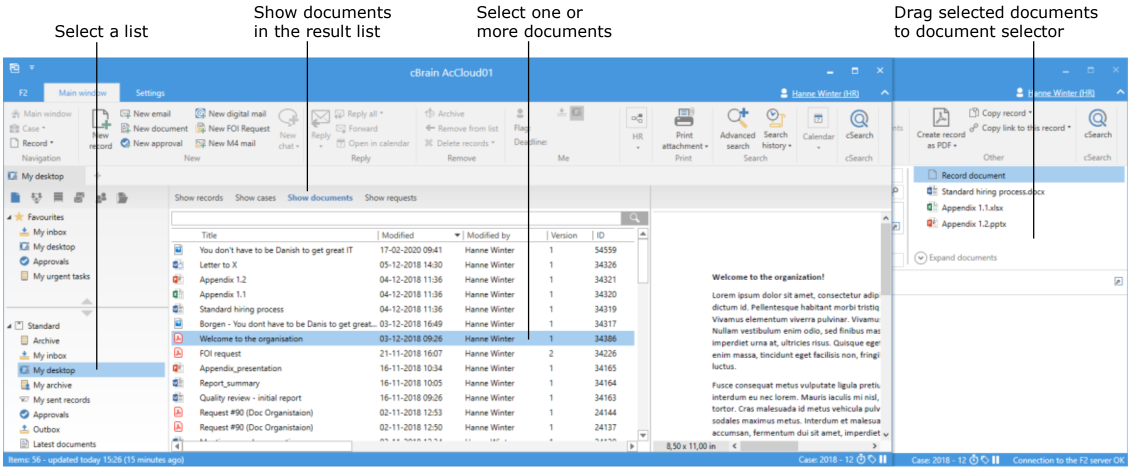


Figure 104: Copy documents from main window to record

Attach record

The "Attach record" menu item lets the user add a record as an attachment to a record.

Figure 105: "Attach record"

Click **Attach record** to open the "Choose records" window which contains the same search options as F2's main window. These are used for adding one or more records to the open record.

The search window and the attachment process are identical to those described above in the section *Attaching a document from F2*.

The one difference is that the user must also select the record format, i.e. whether it is attached as a "Record attachment" or "PDF".

A "Record attachment" contains the record document, a PDF of its metadata, and its attached documents (if any) in their original format. A record attachment is shown in the document selector as a folder that can be expanded to show a list of documents.

The "PDF" option will add a PDF file containing the record metadata, the record document and its attachments.

The section *Record attachments in the document selector* describes this in further detail.

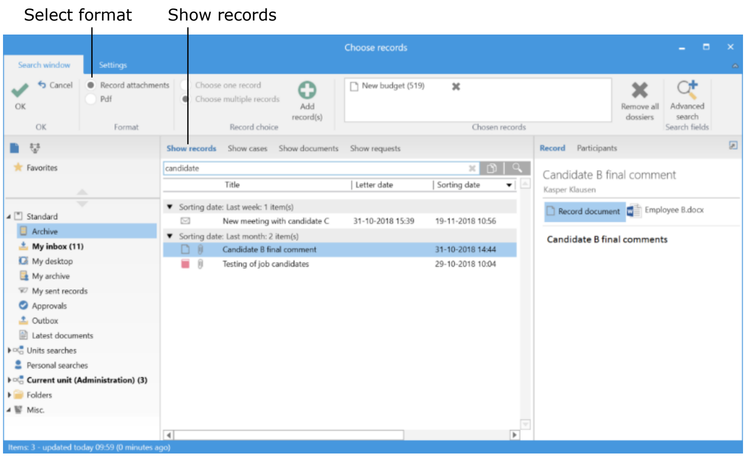


Figure 106: Choose attachment format

It is possible to select multiple records in the main window and drag them to a record to add them as copies.

The procedure is the same as when copying documents from the main window. For further details, see the section *Select and copy multiple documents to a record*.

Record attachments in the document selector

A record attached in PDF format is shown in the document selector with the other attachments.

A record attached as a record attachment is displayed with a folder icon which can be expanded to show a PDF with metadata and the record's attachments in their original format.

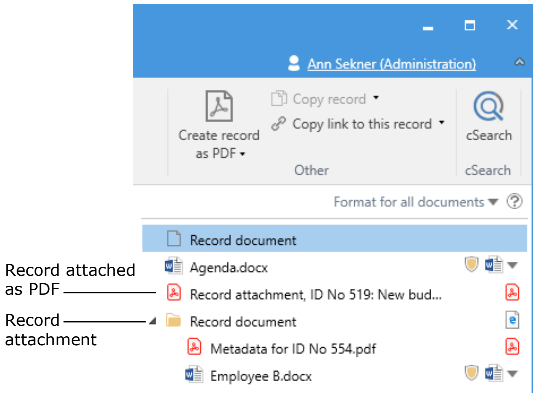


Figure 107: Record attachments

The attached record is a copy of the original.

It is possible to perform changes to the documents of an attached record. To apply these changes to the original document as well, right-click the document in the document selector and select "Overwrite original".

Before the content is overwritten, F2 asks for confirmation from the user.

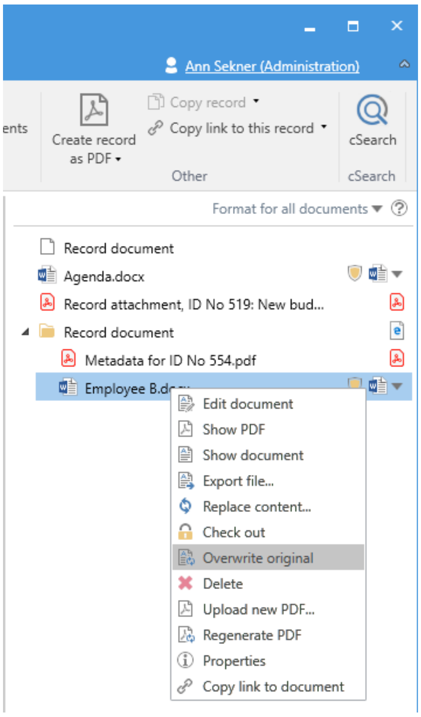


Figure 108: Overwrite original document

The following restrictions exist for record attachments in F2:

It is not possible to attach a record as a record attachment if that record has a record attachment itself. If the user attempts to attach such a record, the following dialogue appears:

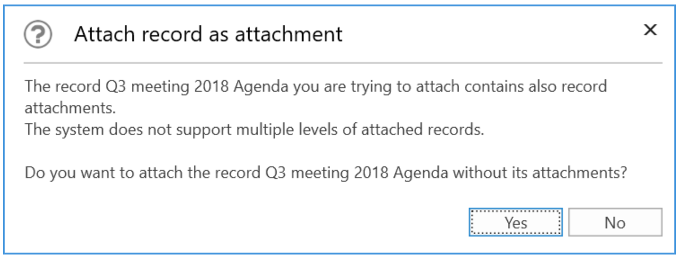


Figure 109: "Attach record as attachment"

Click **Yes** to attach the record without its record attachment.

It is possible however, to add the record including its record attachments by selecting the "PDF" option.

An email record may contain other email records as attachments which in turn may contain attached email records or documents. When such an email is imported into F2, all its attachments are created as documents on the record, i.e. the structure from the email will not be reflected in F2.

Import file

This function lets the user search for and attach documents from various external sources, such as the user's PC, memory sticks, DVDs, etc.

Figure 110: "Import file"

Click **Import file** to open the File Explorer from which a file can be selected and imported into F2.

Note: Only files – not folders – may be transferred to F2.

Importing a file through the import folder

A file can be imported to F2 through the import folder in File Explorer. The import folder can be found here: %AppData%\cBrain\F2\F2 Archive folder.

Add files to this folder to import them into F2. A record will be created for each file, with the record title being the file name. The user will be set as responsible for the record.

The image below shows an example of an import folder in Windows containing the PDF file "Overview plans for the harbor renewal 2017". When the F2 window becomes active, a record will be created to which this file is attached.

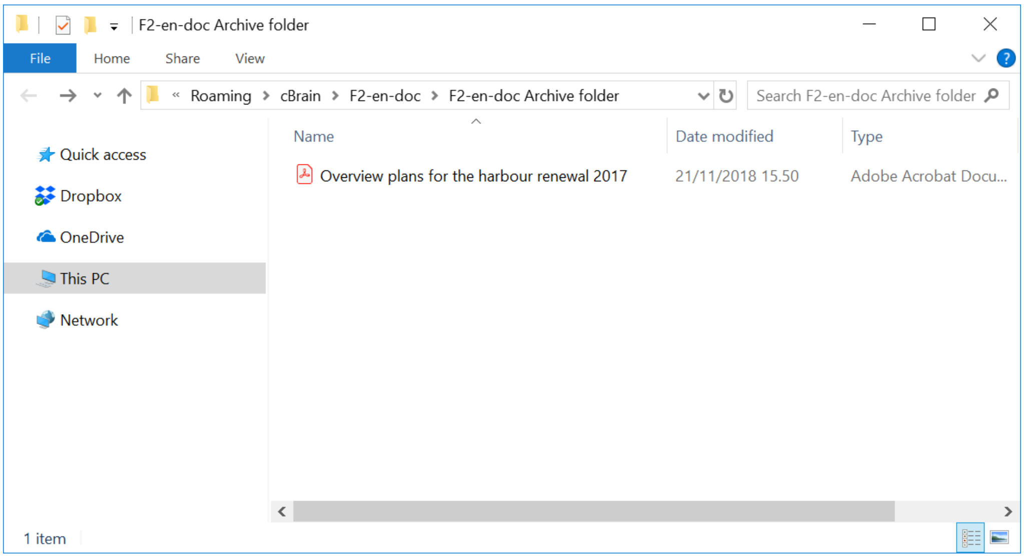


Figure 111: Import folder in Windows

Attach document from same case

The "Attach document from same case" menu item is similar to the "Attach document" menu item. The difference is that the former function narrows down the documents that may be attached to those of the case to which the current record belongs.

Figure 112: "Attach document from same case"

Click **Attach document from same case** to open the "Choose documents" window. The window automatically shows the documents from the case to which the record is attached. Select one or more documents to attach to the record.

Include original documents

Figure 113: "Include original documents"

This function is active when an email record has been created as an answer record.

This is a simple way of attaching to the answer record all documents from the original record.

Copy record and merge to case participants

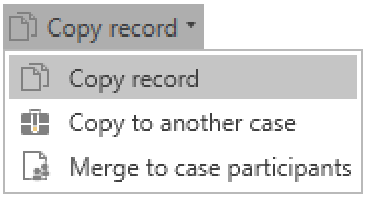


Figure 114: "Copy record" menu item

The following describes the options for copying a record and merging a document template to the case participants.

These functions are found in the drop-down menu of the "Copy record" menu item on the record ribbon.

Copy record

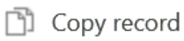


Figure 115: "Copy record"

Click **Copy record** to open the "New record" dialogue from which it is possible to create a copy of the open record.

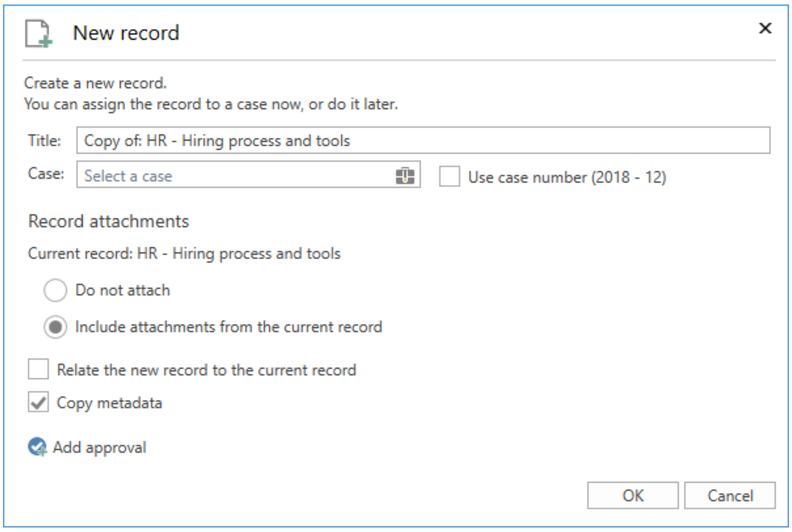


Figure 116: Create new record via "Copy record"

When copying a record, the user must take the following fields into account:

Field	Purpose
"Title"	Enter the record title here. F2 automatically adds "Copy of [title of original record]" in this field.

Field	Purpose
"Case"	Add the record to an existing case by entering the case number here, or search for a case by clicking the icon. It is also possible to create a new case for the record.
"Use case number"	If the original record is attached to a case, the user can tick this box to add the new record to the same case.
"Record attachments"	Choose whether to copy the attachments from the original record to the new record. By default, the option "Include attachments from the current record" has been selected, which means that all attachments from the original record will be copied to the new record. If the attachments are not needed, use the "Do not attach" option.
"Relate the new record to the current record"	Tick this box to create the record as an answer record to the original one. This relation is evident in the "Related records" menu item on the "Advanced" tab of the record window. For further information on related records, see the section *Menu items of the "Advanced tab*.
"Copy metadata"	By default, the "Copy metadata" box is ticked. Since the new record is a copy of the original record, it is often desirable to copy the metadata as well.
"Add approval"	Requires the add-on module F2 Approvals. Displays fields related to approvals, so the record can be created with an approval flow attached. For further information, see *F2 Approvals – User manual*.

Copy to another case

Figure 117: "Copy to another case"

This function is a quick way of copying a record to another case.

Click **Copy to another case** to copy the record as well as its metadata and attachments to another case specified by the user. See the dialogue below in which the user must select a case to which the copy is added.

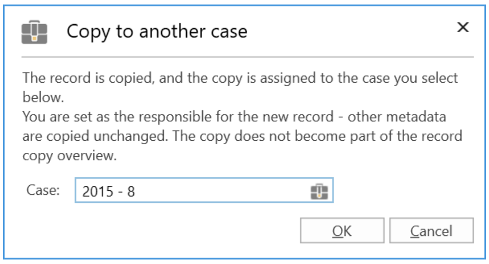


Figure 118: "Copy to another case" dialogue

From this dialogue it is not possible to choose between variations of the record, whether to include metadata or to create a relation.

Click **OK** to open the new record.

Merge to case participants (add-on module)

Figure 119: "Merge to case participants"

"Merge to case participants" is an add-on module for F2, and the menu item is available only if the module is installed.

This function will add a document from a template to the open record. This template contains one or more merge codes, which may collect information from the participant register, metadata or the phrase archive.

This lets the user merge standard mail templates with the participants identified on a given case.

Menu items of the "Advanced tab"

The record window's "Advanced" tab contains menu items for working with a record. Whether a menu item is active depends on the user's role and the record's status. For example, the active menu items of an email record differ from those of a standard record.

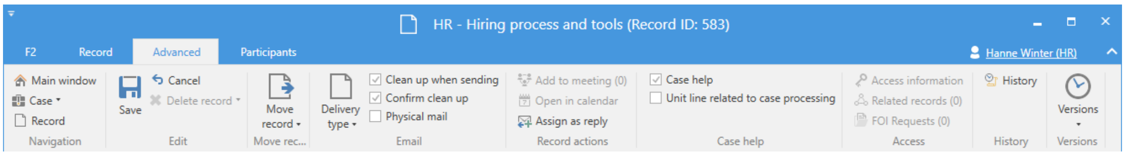
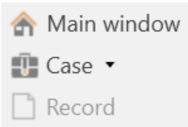
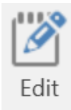
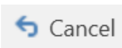


Figure 120: Menu items of the "Advanced" tab

The access restrictions on a record also affect which menu items that are active.

The menu items of the "Advanced" tab are described below.

Menu item	Function
	Navigate quickly between the main, case and record windows. When e.g. the record window is open, the other two menu items become active, letting the user switch to either one.
	When a record is in read-only mode, the user may click the **Edit** button to make changes to the record document, its attachments and its metadata fields. When the record is in editing mode, the "Edit" icon is replaced with the "Save" icon.
	The user may save changes to the record document, its attachments or its metadata fields by clicking **Save**.
	Use to cancel any changes made to the record document, its attachments or its metadata fields.

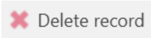
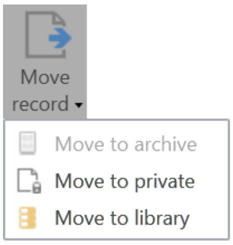
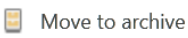
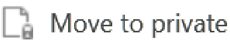
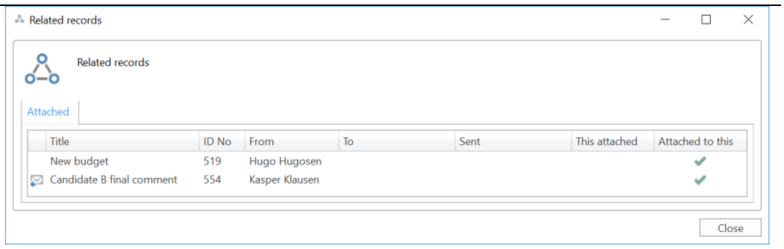
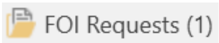
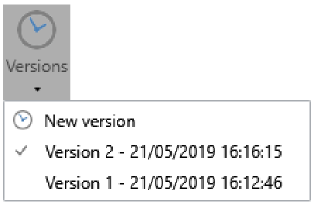
<table>
<tr><th>Menu item</th><th>Function</th></tr>
<tr><td>
</td><td>
Depending on whether the record has been shared, “Delete record” works in two different ways.
For further information on deleting records, see the section The record ribbon functions.
Users with the “Can delete records for everyone” privilege have access to the “Delete for everyone” menu item via a drop-down menu.


Figure 121: Drop-down menu for “Delete record”
</td></tr>
<tr><td>
</td><td>
The “Move record” drop-down menu contains three items:
Move to archive
Move to private
Move to library.
These items are described below.
</td></tr>
<tr><td>
</td><td>
The menu item “Move to archive” is active for records placed in “My private records”. Use it to move a record from here to the shared archive.
</td></tr>
<tr><td>
</td><td>
Move a record to “My private records”. Only records with the access level “Involved” may be made private.
F2 asks for confirmation before a record is made private.
If the record is attached to a case, it will be removed and a new version of the record will be created.
Records from “My private records” may be moved back to the “Archive”.
Only the user who moves the record to “My private records” is able to view and access the record.
For further information on the “My private records” list, see the manual F2 Desktop – The main window.
Below is a list of situations in which it is not possible to move a record to “My private records” list.
The record is shared with other F2 users.
The record is an email record and has been sent.
The record has been shared via a chat or a note.
</td></tr>
</table>

Menu item	Function
	• The record's access level is "Unit" or "All". • The responsibility for the record has been allocated to another user. • The record has a supplementary case manager.
Move to library	This function moves a record to the "Library" list. **Note**: A record that is moved to the "Library" retains its access level. If its access level is "Involved", only involved users will be able to see the record in the "Library" . The "Library" list is an archive shared between all F2 users, so records with access level "All" in the "Library" can be seen by all users in the authority. Certain conditions must be met before a record can be moved to the "Library". An existing record may only be moved to the "Library" list if it has not been shared. This means that its access level must be "Involved" and no other users in F2 must be involved with the record, e.g. via a chat. After it has been moved to the "Library", a record's access level, attachments and metadata may still be edited. If a record that is moved to the "Library" was added to a case, a copy will be created and the original record will be removed from the case. **Note**: It is possible to create records directly in the "Library" by selecting the list and then clicking on **New record**.
	The "Delivery type" drop-down lets the user choose how to send the record. When the delivery type has been chosen, the relevant metadata fields are added to the record. The menu item's icon will change to reflect the delivery type. This change also applies to the title bar of the record window: Record (no delivery) Email Digital mail M4 mail

Menu item	Function
	The delivery type may be changed even when the record is not in editing mode. Changing the delivery type happens instantaneously, and it is not necessary to save the record for the change to take effect. **Note**: “Delivery type” options depend on the add-on modules of the organisation.
☑ Clean up when sending ☑ Confirm clean up ☐ Physical mail	These menu items may be used when sending email records. • “Clean up when sending”: Tick this box to remove the record from “My inbox” and change the record’s status from “In progress” to “Complete” when sent. • “Confirm clean up”: Tick this box to display the “Clean up when sending” dialogue before sending, allowing the user to confirm or dismiss certain actions relating to the record. • Physical mail: Informs F2 that the email record will be sent as a physical letter and lets the user add e.g. a letter date to the record. Via “Setup” on the “Settings” tab of the main window, the user can choose that F2 ticks all boxes automatically. Regardless of personal settings, it is possible to decide F2’s actions each time an email record is sent.
Add to meeting (0)	Use this menu item to add a record to a specific meeting. The number of meetings to which the record is added is shown in brackets. *F2 Meeting* is an add-on module that aims to facilitate meetings by assisting the user in preparing an agenda, managing meeting documents and producing minutes. For further information, see *F2 Meeting– User manual*.

Menu item	Function
Open in calendar	This menu item is active if integration with Microsoft Outlook is enabled. Click **Open in calendar** to open the invitation in Outlook.
Assign as reply	This menu item is used to assign a record as a reply to an incoming email. Click **Assign as reply** to open the "Choose record" dialogue in which the email record can be selected.
☑ Case help	Tick this box to make the "Case help" dialogue appear when the record is saved. The case help is set up during initial configuration of F2 and helps the organisation follow certain rules of governance (determined by the organisation's leaders that must be applied in F2). For further information, see the section *Case help*.
☐ Unit line related to case processing	When a record is sent to an internal user or unit, the "Unit casework" line is created for each recipient, both users and units. The "Unit casework" line appears when the record is sent and is visible when the advanced metadata fields are shown. For further information on this line, see the manual *F2 Desktop – Management and organisation*.
Access information	Opens the "Access information" dialogue which lists the users with access to the record. The user must have the "Can see access information" privilege to view this list. For further information on this dialogue, see the section *Access information*.
Related records (1)	F2 automatically relates an incoming email with other records when the user clicks **Reply**, **Reply all**, **Assign as reply** or **Forward**. This menu item will open the "Related records" dialogue which lists other records that are part of the correspondence. This menu item becomes active when the record is linked to another record. The number in brackets shows the number of related records.

Menu item	Function
	 **Figure 122: "Related records" dialogue** This window contains information about sender, recipient and when the email record has been sent. The columns at the far right show whether the related record precedes or follows the open record.
	This menu item is active when the record is part of an FOI request. The number in brackets shows the number of FOI requests in which the record appears. Clicking **FOI Requests** opens a dialogue with a list of the FOI requests in which the record appears. FOI request is an add-on module.
	Opens the "Record history" window which lists all activities registered on the record. For further information, see the section *History*.
	Create a new version of the record and view previous versions. For further information, see the section *Versioning*.

Functions of the “Advanced” tab

This section describes the functions of the “Advanced” tab.

Case help

F2’s case help assists users in following the organisation’s rules and guidelines for case processing.

The case help is configured when F2 is installed and often originates from the organisational governance model or guidelines. This means that it may contribute to keeping case work in line with the organisation’s wishes regarding its conduct.

An F2 installation typically comes with case help enabled. Depending on its configuration, it may be optional or mandatory for users to follow the case help’s suggestions.

The case help also facilitates that deliveries to the National Archives or a similar institution are performed with a minimal search for records that are not associated with a case, but should have been. Registering a record is insufficient if it must be delivered to the National Archives; it must also be associated with a case. The case help can be set up to remind users of this.

In the case help dialogue for suggested changes, the dialogue title informs the user which action that caused the dialogue to open. The action may be saving, sending, forwarding or replying to a record.

The dialogue text offers more context. Suggested changes are based on one of five categories:

- Save record.
- Save record from external participant.
- Send record internally.
- Send record to own unit.
- Send record externally.

The figure below is an example of F2 supporting the user via case help when sending an email record. In this example, management has decided that outgoing email records must be registered, that they must be attached to a case, and that their access level must be “All”.

If the sender has not performed these actions already, the case help will open and suggest that the user perform them.

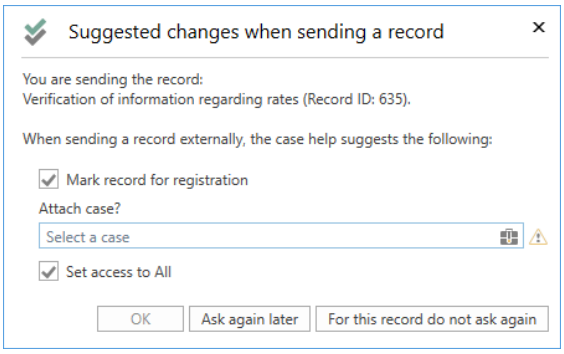


Figure 123: Case help: Suggested changes

When the user has selected the actions to be performed on the record, three options exist:

Function	Purpose
"OK"	The case help will perform the selected actions on the record.
"Ask again later"	The case help will not perform any actions, but remains active. The dialogue reappears when relevant.
"For this record do not ask again"	The case help will not perform any actions and is deactivated for this record. It may be reactivated via the "Advanced" tab.

Note: The case help will not suggest retaining the current access level or changing it to a more restricted one.

Case help on answer records

If the organisation has decided that records be created with case help, the following applies:

- Case help is activated for records created as a reply to or a forward of a record with case help activated.
- Case help is activated for records created as a reply to or a forward of a record without case help.
- Case help is activated for records that are replies to other records.

If case help is activated for an incoming email record, and the user clicks either **Reply**, **Forward** or **Reply all**, F2 performs the following actions:

- Access level is set to that of the incoming record
- "Case help" is ticked.
- The responsibility is allocated to the user.
- The record is marked as read.
- Flags are removed from "Unit line to case processing".

Note: The case help configuration is done by cBrain.

Access information

Access information shows users with:

- Read access to the record
- Write access to the record's attached documents (including the record document)
- Full write access to the record and attached documents (including the record document).

To access a record, the following conditions must be met:

- The user has read access to the record.
- If the record has an access restriction, the user must be included in at least one of the access groups.

Click **Access information** on the "Advanced" tab in the record window to open a dialogue which lists the users with access to the record and their access level.

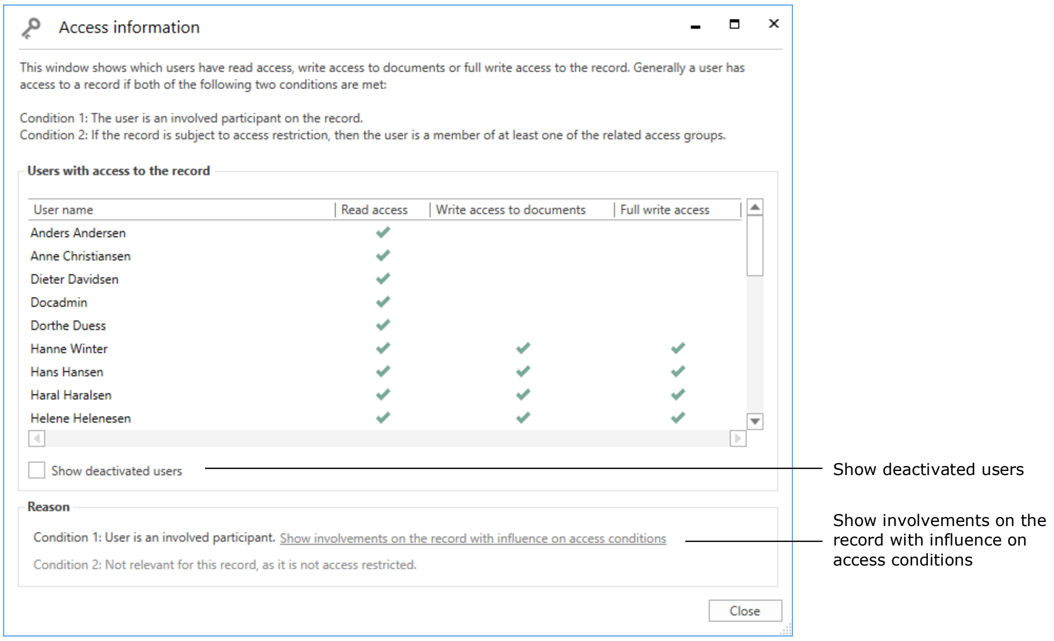


Figure 124: The "Access information" dialogue

Tick the box next to "Show deactivated users" to include these in the list of users with access to the record.

To see further details about users' access conditions, click **Show involvements on the record with influence on access conditions**, which opens the following dialogue.

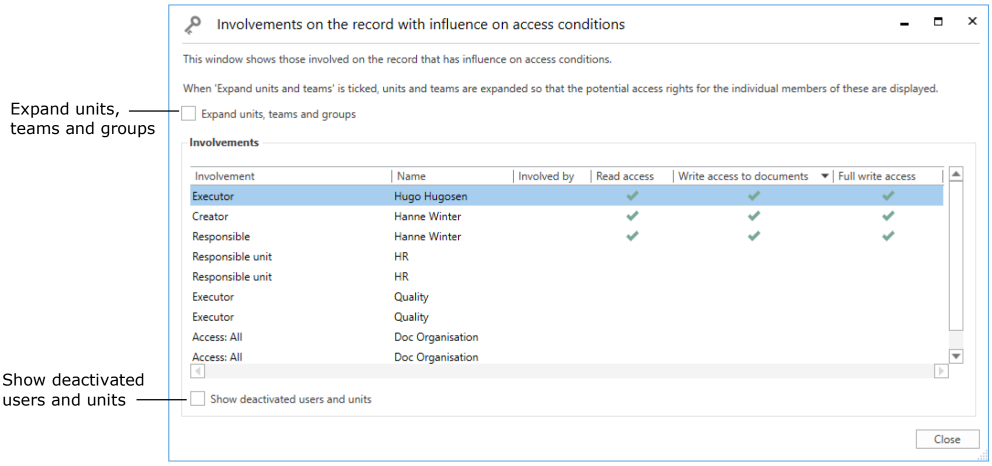


Figure 125: Influence on access conditions

This dialogue shows which users have read access, which have write access to documents, and which have full write access. If a unit or team has any influence on the access condition, users who are a part thereof may be seen by ticking the “Expand units, teams and groups” box. It is also possible to view deactivated users and units in this dialogue by ticking the box below the list.

History

When a record is edited, F2 adds a description of the activity to the record history.

Click **History** to see a list of all activity on the record. The record history can display either record changes, documents or metadata. It is possible to filter the list using the filter fields below the column titles. F2 starts filtering the list when the user enters text or makes a selection from the filter’s drop-down menu.

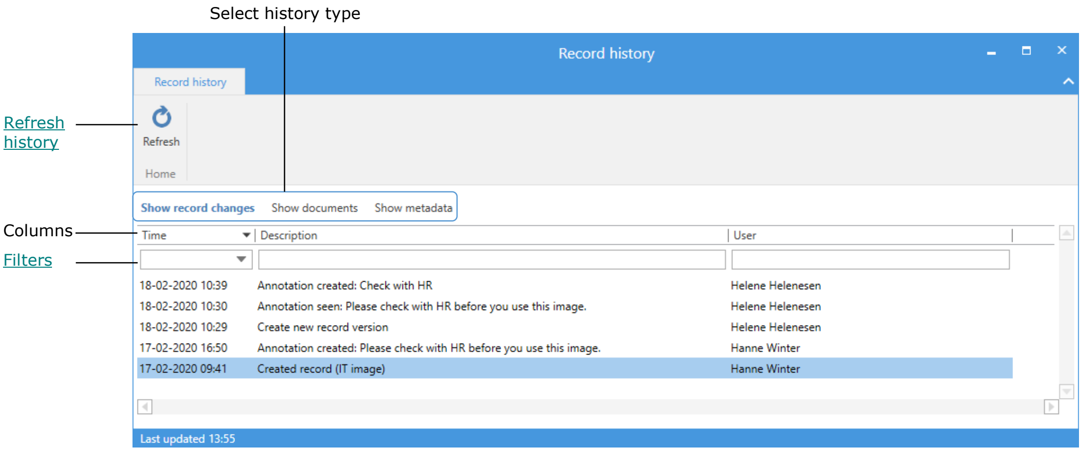


Figure 126: The “Record history” dialogue

The dialogue can be kept open while working in F2. Click “Refresh” to update the list of record history actions.

The record history is divided into three tabs:

Show record changes

Click **Show Record changes** to display information about changes, including creation time and date for the record and selected metadata.

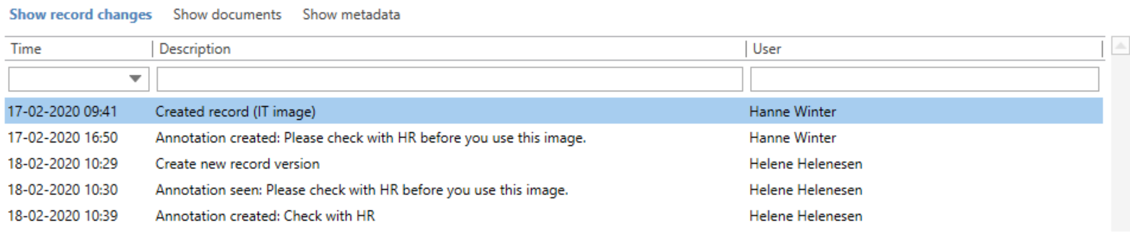


Figure 127: History: Record changes

Show documents

Click **Show documents** to display information about changes to the record's attached documents. The record document is included in this list.

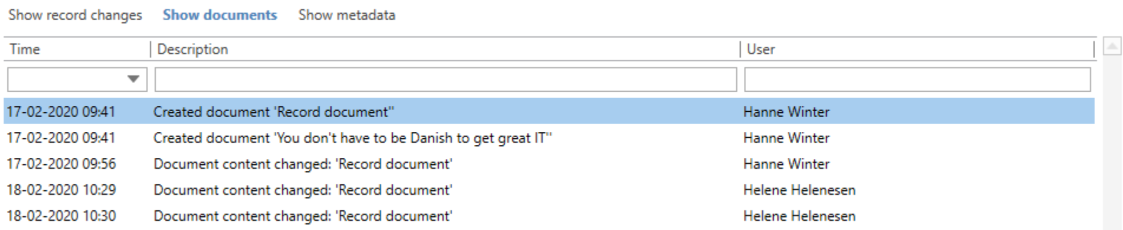


Figure 128: History: Record documents

Show metadata

Click Show metadata to display information about changes to the record's metadata, including notes, approvals and requests.

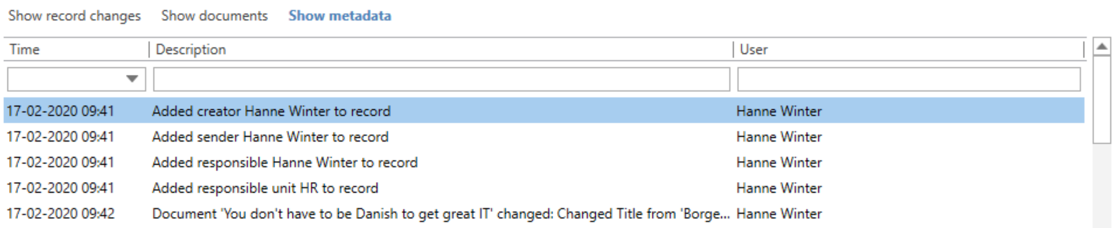


Figure 129: History: Record metadata

Versioning

Versioning of records are managed by F2. A record and its attachments only appear once in F2. When a new version of a record is made, all users will see the newest version.

It is possible to check the record's current version and each version's creation date and, if the user has at least write access to the record's documents, make an earlier version valid again. F2 retains all previous versions of the record, and they can be accessed via the record window.

Versioning is described in further detail below.

Creating a new version of a record

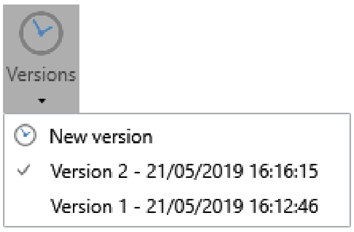


Figure 130: New version

To create a new version of a record, click **New version** in the "Versions" drop-down menu on the "Advanced" tab in the record window.

In certain instances, a new version is created automatically. This happens when:

- A record is moved from one case to another, i.e. the case number on the record is changed. F2 creates a new version of the record before any other changes are saved.
- A user that is not responsible for the record makes changes to its attached documents. Since the user does not own the document, F2 asks if a new version should be created after editing.

Note: If a user makes several successive document changes, F2 only asks to create a new version once.

Previous versions

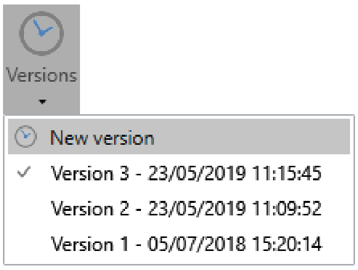


Figure 131: Select previous version

A list of previous record versions can be found via the "Versions" drop-down menu on the "Advanced" tab in the record window. Each version is assigned a number, with the highest being the most recent version of the record.

By default, the most recent version of the record is displayed. To see a previous version, click on it in the list.

F2 will then open the previous version of the record, and a purple bar above the record metadata shows that it is version x of y.

This means that a user can always access previous versions of a record and its attachments in F2 regardless of how many changes and edits have been made to them.

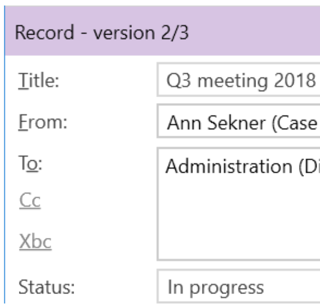


Figure 132: Version 2 of 3

Note: The record must be in read-only mode for the "Versions" drop-down menu to be active.

A previous version of the record cannot be edited, but the user may make a copy of the record in the desired version and continue working with this version in a new record.

However, a previous version of the record can be set as the active version.

In read-only mode, click "Make version X the active version" after selecting a previous version of the record.

Clicking **Make version X the active version** creates a new version of the record based on the currently selected version. In the example on the figure to the right, version 2 would be the basis for a newly created version 4.

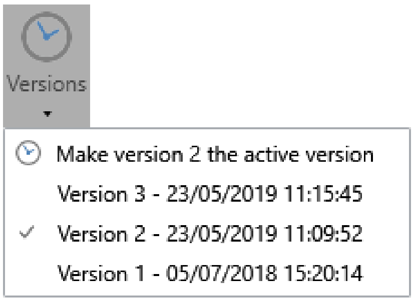


Figure 133: Make current version the active version

This means that attachments added in a later version are removed, and that changes after to the record document and/or its metadata after version 2 are reverted.

Note: Only the active version of a record can be edited.

Versions and access

The "Access" value on the newest version of a record determines whether a user can find and access the record.

The record's access level is retained when a new version is created. For example:

Three versions of the record A exist. All have the same case manager and responsible unit, but version 1's access level is "Involved", version 2's is "Unit", and version 3's is "All".

All users have access to version 3, users in the responsible unit have access to version 2 and 3, and only the users involved on the record are able to see all three versions.

Menu items of the "Participants" tab

The "Participants" tab shows a list of participants involved on the record.

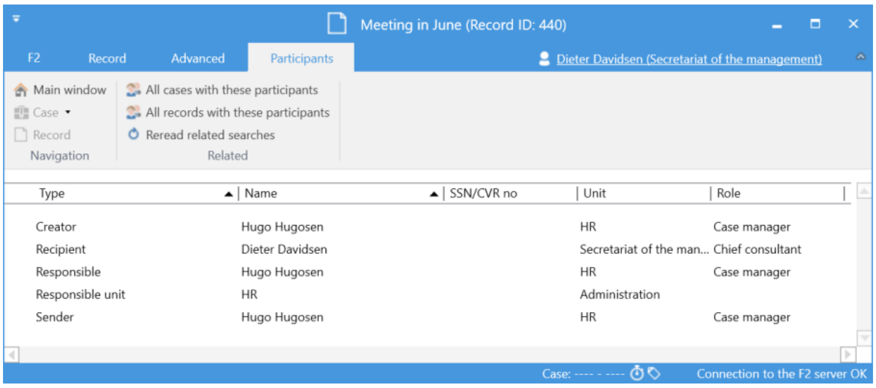


Figure 134: The "Participants" tab in the record window

Note: F2's participant register can also be accessed by clicking the icon above the search lists to the left of the main window or by using the keyboard shortcut **Ctrl+K**. For further information, see *F2 Desktop – Searches*.

Right-click a column in the list and click **Columns** from the menu to go to "Select columns". From here, it is possible to hide or display more columns.

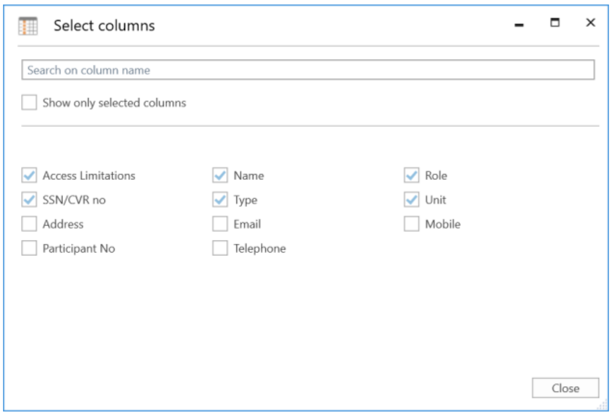


Figure 135: Select columns on the "Participants" tab

Right-click a participant in the list to perform a related search and view which participants are involved on which records and/or cases. For further information, see the section *Related searches* in *F2 Desktop – Searches*.

Menu items for working with the record participants can be found on the "Participants" ribbon. These items are described below.

Menu item	Function
Main window Case Record	Navigate between the main, case and record windows by selecting the desired window. The “Record” menu item is available when the user has selected either the main or case window.
All cases with these participants	This menu item is active when the user selects a participant from the list. Clicking **All cases with these participants** opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.
All records with these participants	This menu item is active when the user selects a participant from the list. Clicking **All records with these participants** opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.
Reload related searches	Clicking **Reload related searches** will add/remove/update search options added by the user via the add-on module F2 Related searches. If an administrator has created a related search option, the user can click **Reload related searches**, and the search option will be available without having to restart the desktop client. **Note**: Changes to a related search option via the F2 Related searches add-on module will be applied when the desktop client is restarted, but will be effective immediately if a user clicks **Reload related searches**. For further information on related searches, see the manual *F2 Desktop – Searches*.

cBRAIN The Process Company

Configuration options

There are certain configuration options available in connection with records and communication. In cooperation with cBrain, these can be implemented to fit each organisation and its work processes. These options apply to the entire F2 installation:

- The option of displaying the record document and HTML attachments in compatibility mode by right-clicking in the document. Useful for emails that are displayed incorrectly. Note that in this mode, the spell check is deactivated. By default, this is deactivated.
- The option of automatic deletion of chats after a certain number of days without new messages. A number of days, e.g. 30 or 60, is selected. It is also possible to decide if new chats are automatically marked for deletion.
- The option of F2 suggesting another location than “External participants” when creating a new participant.
- The option of configuring the default access level for imported emails to “Unit” instead of “Involved”.
- The option of applying the access level from the original record when a reply record or a forwarded record is created.
- The option of marking records in connection with customer-specific integrations. Requires F2 External Access (add-on module).
- The option of adjusting the time period in which a record is kept in “My deleted records” before final deletion.

List of Figures