F2 Desktop

Settings and setup

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.

Settings and setup

It is possible to adjust F2 according to preference in regard to both functionality and layout. For example, it is possible to regulate how to:

- Display the preview of records, cases, documents and emails in the main window.
- Display the access level that is given to users who are added as supplementary case managers, etc.

In the following section the settings and setup possibilities will be presented with the intention of providing the user with an understanding of the possibilities that F2 offers and how to adjust the settings.

The "Settings" tab in the main window is used to adjust and set up F2. Each user can choose from a number of options concerning F2's behaviour as well as change the appearance of the main window.

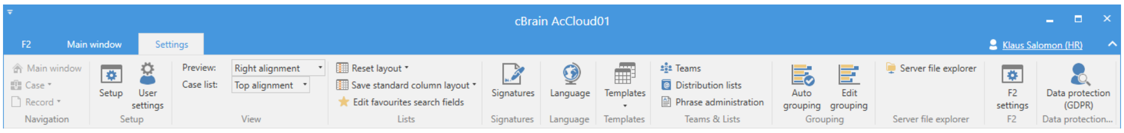


Figure 1: The "Settings" tab

The individual areas under "Settings" will be examined in the following pages.

Setup of personal user settings

The different tabs of the "Setup" dialogue will be discussed in the following sections. To open the "Setup" dialogue, click on **Setup** in the "Settings" tab in the main window.

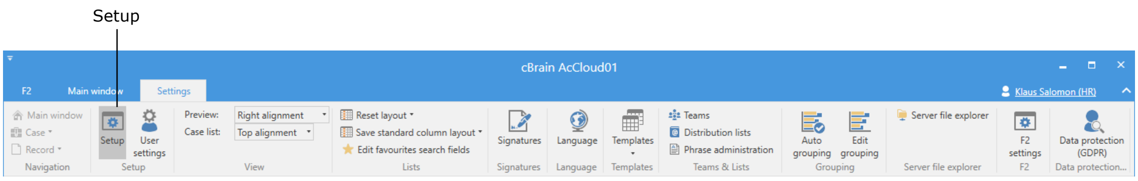


Figure 2: "Setup" under "Settings"

The "General" tab

To change the general settings of F2 click on **General** in the "Setup" dialogue as shown below.

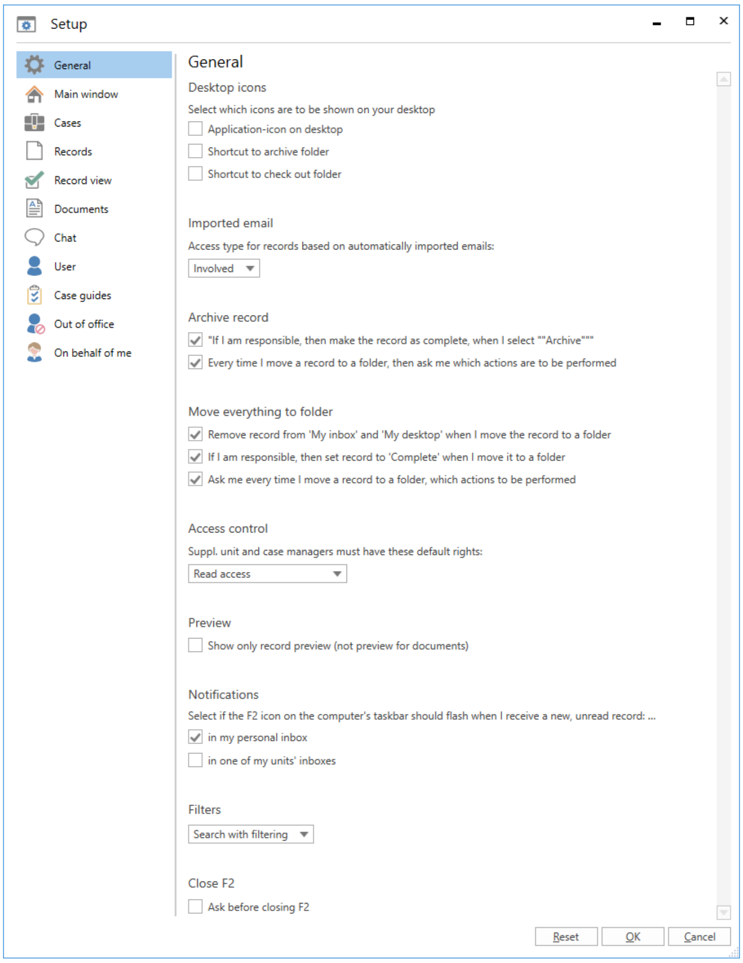


Figure 3: Setup – "General"

The setup possibilities are described below.

Function	**Description**
Under "Desktop icons", select which icons and folders to display on the computer's desktop:	
"Desktop icons"	The following icons can be added to or removed from the computer's desktop: • The F2 program icon • A shortcut to the "Archive folder" (i.e. the folder for importing files to F2). • Shortcut to the "Check out folder" (i.e. the folder in which the user can place documents to work on offline. The documents can be checked back into F2). For more information see *F2 Desktop – Records and communication.*
Under "Imported email", select which access type to give to imported emails:	

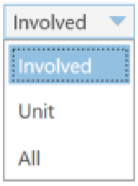
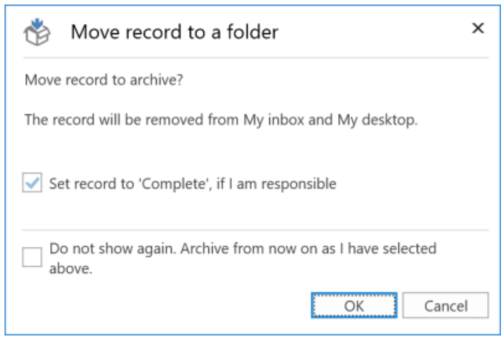
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Access type for records based on automatically imported emails”

</td><td>Here it is possible to control which access level F2 should give imported emails. Choose between the following options:
“Involved”
“Unit”
“All”.
Note: It can be an advantage to set the access level to “Unit”. This way, if a user is not present, the unit colleagues are still able to search for emails intended for the unavailable user.</td></tr>
<tr><td colspan="2">Under “Archive record”, select which actions to perform when a record is archived:</td></tr>
<tr><td>“If I am responsible, then complete the record when I select “Archive””</td><td>If this box is ticked, F2 will automatically set the record as complete when archived if the user is responsible for the record.</td></tr>
<tr><td>“Every time I choose “Archive”, ask me which actions are to be performed”</td><td>If this box is ticked, the dialogue below will open when the user clicks on Archive.


Figure 4: The dialogue “Archive and close”</td></tr>
<tr><td colspan="2">Under “Move everything to folder”, select which actions to perform when a record is moved to a folder.</td></tr>
<tr><td>“Remove record from ‘My Inbox’ and ‘My Desktop’ when I move the record to a folder”</td><td>If this box is ticked, F2 will automatically remove the record from “My Inbox” and “My Desktop” when the record is moved to a folder.</td></tr>
<tr><td>“If I am responsible, then set record to ‘Complete’ when I move it to a folder”</td><td>If this box is ticked, F2 will automatically set the record to complete when moved to a folder if the user is responsible for the record.</td></tr>
<tr><td>“Ask me every time I move a record to a</td><td>If this box is ticked, the dialogue shown below appears every time a user moves a record to a folder.</td></tr>
</table>

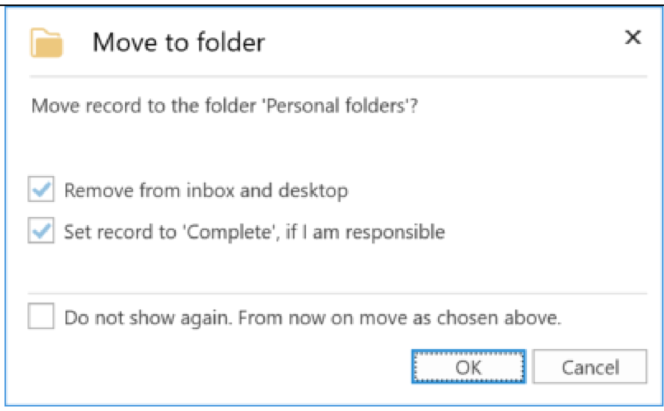
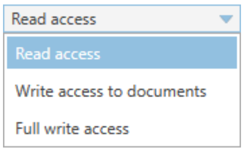
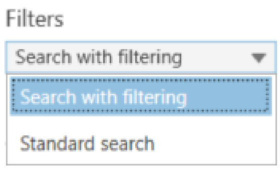
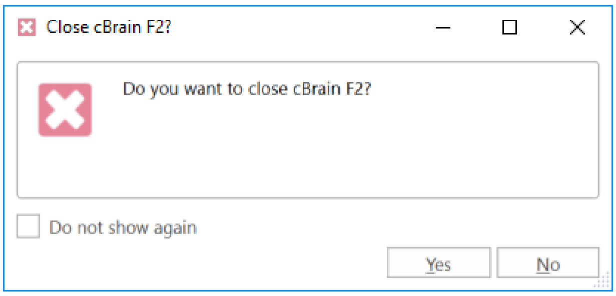
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>folder, which actions are to be performed”</td><td>

Figure 5: The “Move to folder” dialogue</td></tr>
<tr><td colspan="2">Under “Access control”, select which access level to give to a unit or user when added as a supplementary unit or case manager.</td></tr>
<tr><td>“Suppl. unit and case managers must have these default rights”:

</td><td>There are three different access levels to choose between:
“Read access”: The supplementary unit and/or case manager only has read access to the record.
“Write access to documents”: The supplementary unit and/or case manager has write access to any attached documents on the record (including the record document), but NOT to the record itself or the record’s metadata.
“Full write access”: The supplementary unit and/or case manager has write access to the record’s metadata and any attached documents (including the record document).
The standard access level for supplementary units and case managers is “Full write access”. The standard value applies to all new users and/or when a user setting is reset.</td></tr>
<tr><td colspan="2">Under “Preview”, select settings for the preview.</td></tr>
<tr><td>“Show only record preview (not preview for documents)”</td><td>If this box is ticked, the user must click on Show preview to display a preview of the record’s attached documents.

If the box is not ticked, F2 will automatically show a preview of the record’s attached documents.</td></tr>
</table>

Under “Notifications”, select if the F2 icon on the computer’s taskbar should flash when there are new records in an inbox.

Function	Description
"In my personal inbox"	If this box is ticked, the F2 icon will flash when the user receives a new record in his/her personal inbox.
"In one of my units' inboxes"	If this box is ticked, the F2 icon will flash when the user receives a new record in one of his/her unit inboxes.
Under "Filters", choose if the free-text search field should be used to filter results in an already existing search.	
"Filters" 	Select if the free-text search field can be used for filtering. Choose between: • "Search with filtering": The free-text search field can be used to filter results in existing searches. • "Standard search": The free-text search field cannot be used to filter results. Read more about using filters when performing searches in the manual *F2 Desktop – Searches*. **Note**: Searches performed with filtering are not supported for users using screen readers. Users using screen readers must select the standard search option as the default option in their personal user setup to avoid extra notifications when performing searches with filtering.
Under "Close F2", choose whether to display a dialogue when F2 closes.	
"Ask before closing F2"	If this box is ticked, the dialogue "Close cBrain F2?" appears before F2 closes. If the box is not ticked, F2 will close without asking the user to confirm.  **Figure 6: The "Close cBrain F2?" dialogue**

The "Main window" tab

It is possible to personalise the standard settings for the main window. Click on **Main window** in the dialogue "Setup" as shown below.

It is also possible to adjust how searches are generally displayed.

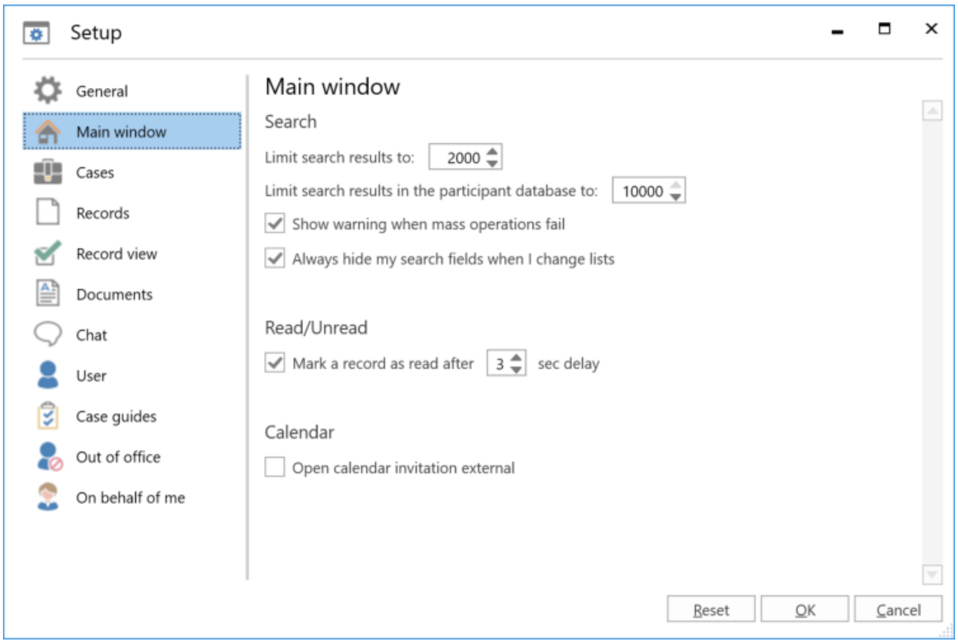


Figure 7: Setup for the "Main window"

The setup possibilities for the main window are described below:

Function	**Description**
"Limit search results to:"	Specify the number of search results that F2 displays in a list when a search is performed. After performing a search, F2 shows the number of results on the blue status line in the bottom left corner. If a user has set the limit at 300 results, F2 will not show more than 300 results. This means that the actual number of results may be greater. **Note**: If the user specifies a large number, the search may take longer to perform.
"Limit search results in the participant database to:"	Specify the number of search results that F2 displays when a search is performed in the participant register. After performing a search, F2 shows the number of results on the blue status line in the bottom left corner. If a user has set the limit at 1000 participants, F2 will not show more than 1000 participants. This means that the actual number of participants may be greater.
"Show warning when mass operations fail"	If this box is ticked, a warning will appear if a mass operation fails.
"Always hide my search fields when I change list"	F2 remembers if search fields in a given list are displayed or hidden.

Function	Description
	Tick this box, and F2 will hide the search fields when changing lists.
"Mark a record as read after X sec delay"	Choose whether to mark a record as read when previewed. It is also possible to specify the amount a time a user must preview a record before it is marked as read. If the box is unticked, the record will be marked as unread until opened or marked as read via the context menu.
"Open calendar invitation externally"	Choose if calendar invitations should open directly in Microsoft Outlook from the F2 inbox by either pressing "Enter" or by double clicking. Calendar invitations opened in the inbox by either pressing "Enter" or by double clicking are by default opened as email records. **Note**: This setup requires an active calendar integration in the F2 installation in question.

The "Cases" tab

Click on **Cases** in the "Setup" dialogue to define which security groups should be added to a newly created case. It is also possible to define which fields should be displayed by default when a case is opened.

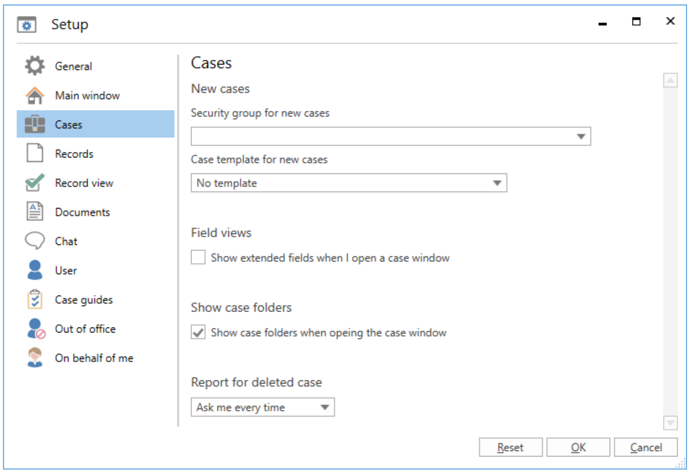


Figure 8: Setup for "Cases"

The setup possibilities for the case window are described below:

Function	Description
"Security group for new cases"	Specify if new cases should be attached to a specific security group. If this field is not filled in, new cases will not be given a security group when created.

Function	Description
	Security groups function as access groups with the purpose of protecting data in F2. A user with the "Security group administrator" privilege can assign users to security groups. Read more about security groups in *F2 Desktop – Administrator*.
"Case template for new cases"	Specify which case template to use by default upon creating a new case.
"Show extended fields when I open a case window"	Select whether a case should open with collapsed or expanded metadata fields.
"Show case folders when opening the case window"	Select whether any case folders should be displayed when opening a case window. If this box is unticked, case folders will be hidden when opening a case window.
"Report for deleted case"	Select if a report should be generated when a case is deleted. This setup option is only visible to users with either the "Can delete cases" privilege or the "Can delete everything on cases" role.  **Figure 9: Report for deleted cases** The option to generate a report for deleted cases can be deactivated. If this is chosen, the option will no longer be visible to users with the privilege to delete cases. The configuration is performed in cooperation with cBrain.

The "Records" tab

It is possible to personalise the record window's settings. Click on **Records** in the "Setup" dialogue as shown below.

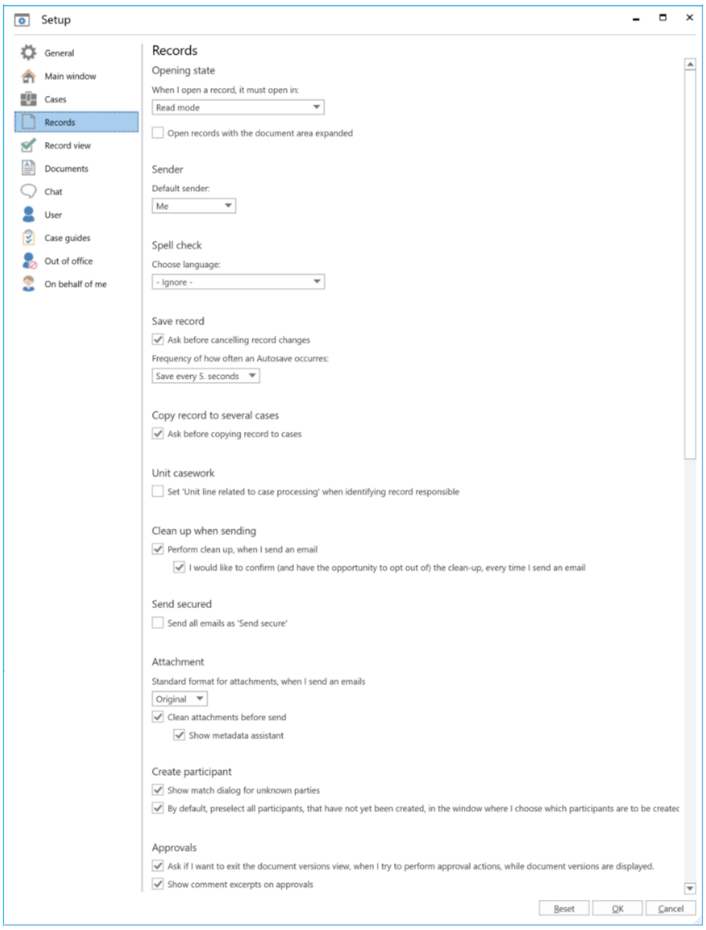
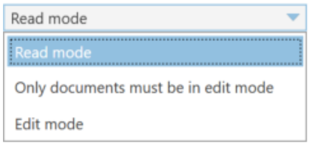
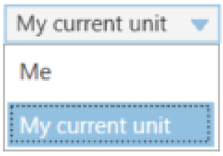
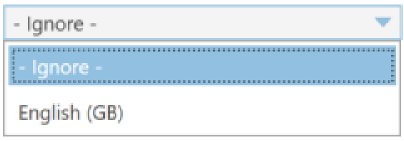
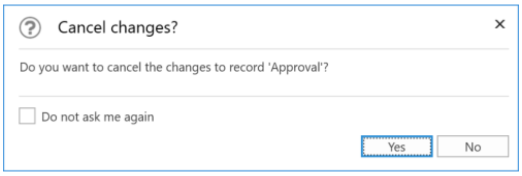
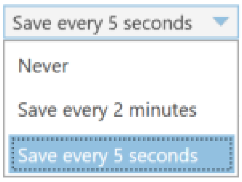
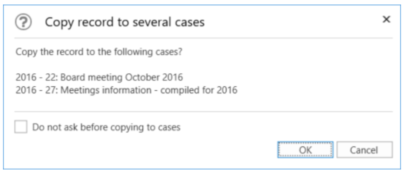
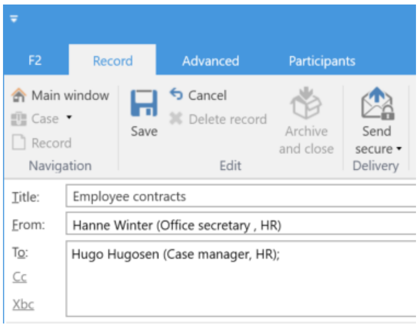


Figure 10: Setup for "Records"

The setup options for the record window are described below:

Function	Description
"When I open a record, it must open in:" 	Choose in which state to open a record: • "Read mode" means the user has to click on **Edit** in order to write in the record. • "Only documents must be in edit mode" opens the record in read mode, but it is possible to edit the attached documents. • "Edit mode" lets the user edit metadata, attached documents and the record itself without clicking on Edit.
"Open records with document area expanded"	Opens the record with the document area expanded. If this box is unticked, the document area will be collapsed.

Function	Description
"Default sender"	Select if the user or the user's current unit should be the standard sender for new deliveries.  **Figure 11: Select the standard sender** **Note**: It is always possible to select a different sender in the "From" field on an email regardless of which standard setting has been chosen.
"Choose language"	Select or deselect the spell-check function for the desired language.  **Figure 12: Select language**
"Ask before cancelling record changes"	Choose whether F2 should ask for confirmation when the user clicks the "Cancel" button in the record window.  **Figure 13: The "Cancel changes?" dialogue**
"Frequency of how often auto save occurs"	Choose between the following auto save intervals:  **Figure 14: Select the auto save interval**

Function	Description
"Ask before copying record to cases"	Select if F2 should ask the user if the record should copy the chosen record to more than one case.  **Figure 15: The "Copy record to several cases" dialogue** Read more about copying records to cases in *F2 Desktop – Records and communication*.
"Set 'Unit line related to case processing' when identifying record responsible"	If this box is ticked, the record field "Unit line related to case processing" will be ticked by default when the record is allocated responsibility.
"Clean up when sending" lets the user adjust the automatic clean-up:	
"Perform clean-up, when I send an email"	If this box is ticked, F2 helps the user clean up by automatically completing and moving the record to the "Archive" when it is sent.
"I would like to confirm (and have the opportunity to opt out of) the clean-up, every time I send an email"	If this box is ticked, F2 asks the user to confirm before performing the clean-up.
"Send all emails as 'Send secure'"	When ticked, F2 will send all emails using the "Send secure" function (add-on module). It is possible for the user to deselect this option for each individual record.  **Figure 16: "Send secure" as a default setting** **Note**: The Send button in the record window changes according to the user's default setting. If the user has ticked the "Send secure" box, the "Send secure" will be shown as the default sending option.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td colspan="2">It is possible to choose the standard format for attachments to outgoing records. It is also possible to select whether the attachments should be cleaned of internal metadata (add-on module).</td></tr>
<tr><td>“Standard format for attachments, when I send an email:”</td><td>Choose whether attachments to an outgoing record should have the format “PDF” or “Original”.</td></tr>
<tr><td>“Clean attachments before send”</td><td>Choose whether record attachments should be with or without metadata.</td></tr>
<tr><td>“Show metadata assistant” (add-on module)</td><td>F2 shows the format of attachments to a record.

Before sending an email to an external participant, F2 will open the dialogue below in which the user can choose how to send the attachments.

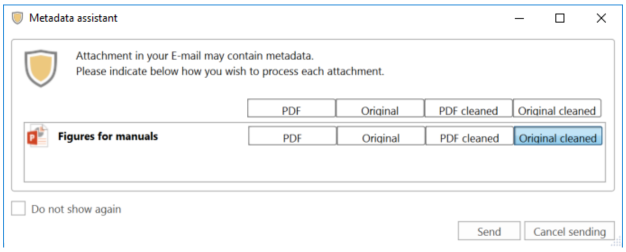


Figure 17: The “Metadata assistant” dialogue</td></tr>
<tr><td colspan="2">“Create participant” lets the user set up how F2 handles participants that do not exist in the participant register.</td></tr>
<tr><td>“Show match dialogue for unknown participants”</td><td>If an external email is sent or received and F2 does not recognise the participant, a dialogue will open in which the unknown participant can be saved.

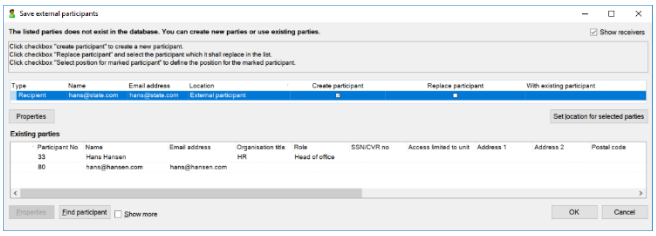
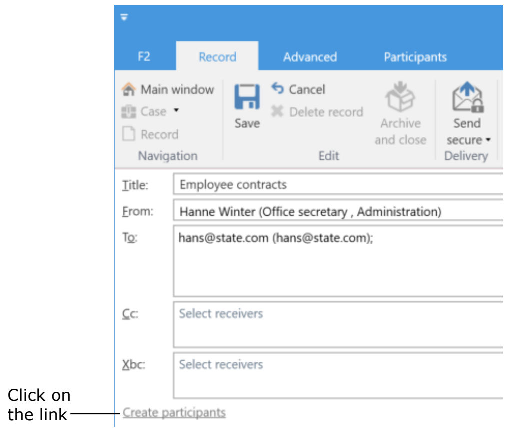
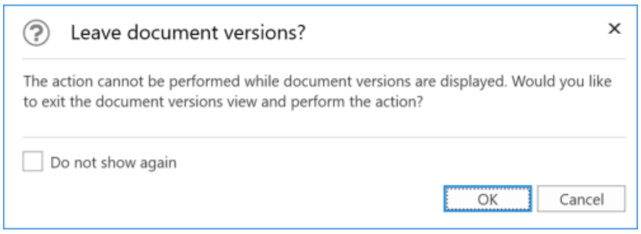


Figure 18: The “Save external participants” dialogue</td></tr>
</table>

Function	**Description**
"By default, preselect all participants, that have not yet been created, in the window where I choose which participants are to be created"	Click on **Create participant** in the record window to add an unknown participant to the participant register.  **Figure 19: "Create participants"**
"Approvals" (add-on module) contains settings pertaining to how document versions and comments are displayed in approval processes.	
"Ask if I want to exit the document versions view, when I try to perform approval actions, while document versions are displayed" (add-on module)	If an attempt to process an approval is done while viewing the document versions in the log, the dialogue shown below will appear.  **Figure 20: The "Leave document versions?" dialogue** For additional information see *F2 Approvals – User manual*.
"Show comment excerpts on approvals"	Select if comment excerpts should be shown directly in the approval step overview. The excerpts are shown under the name of the approver. Read more about approval comments in *F2 Approvals – User manual*.

The "Record view" tab

It is possible to personalise how the record window should be displayed when opened. Click on **Record view** in the "Setup" dialogue to access the settings as shown below.

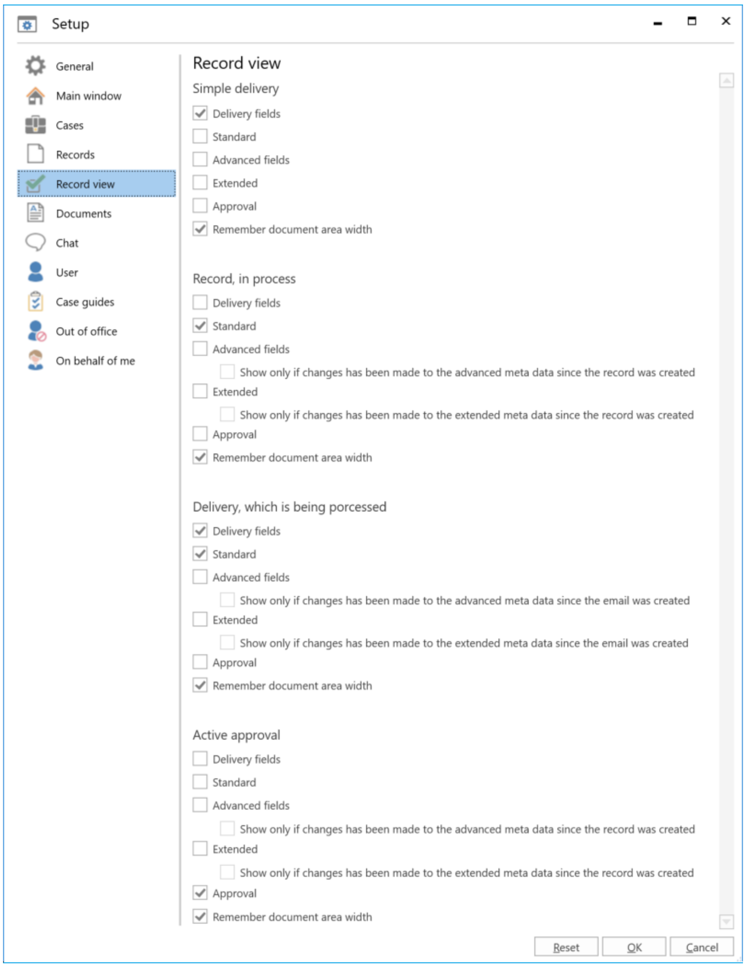


Figure 21: Setup for "Record view"

The viewing options for the record window are described below. For example, it is possible to choose whether a record opens with its metadata fields collapsed or expanded. It can also be decided if the width of the document area last opened should be remembered.

Function	**Description**
"Simple delivery"	Select how to display metadata for delivery records.
"Record, in process"	Select how to display metadata for records in process.
"Delivery, which is being processed"	Select how to display metadata for delivery records in process.
"Active approval" (add-on module)	Select how to display metadata for active approvals.

The "Documents" tab

Click on **Documents** in the "Setup" dialogue to determine how F2 opens an attached document on a record not in editing mode. It is also possible to define how F2 should react when a document is opened directly from the main window.

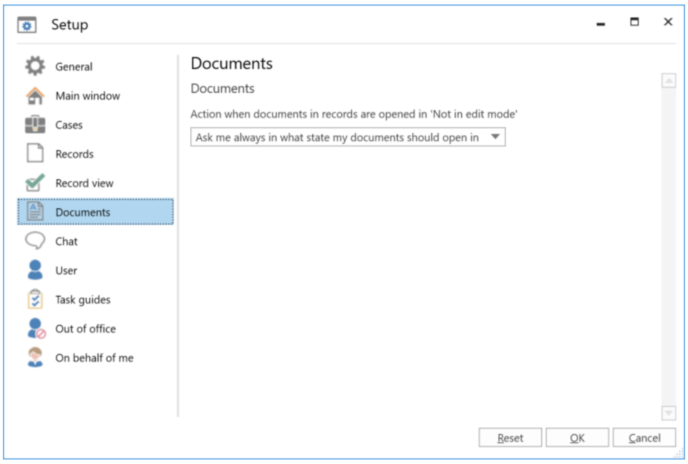


Figure 22: Setup for "Documents"

The setting options for the function "Action when documents in records are opened in 'Not in edit mode'" are described below. It is possible to choose in which state to open attached documents in F2. This is valid for both the record and main windows.

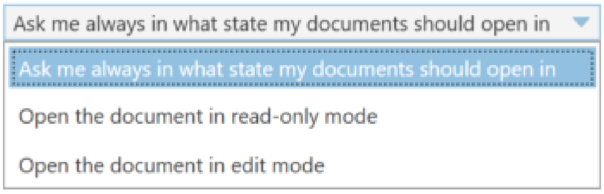
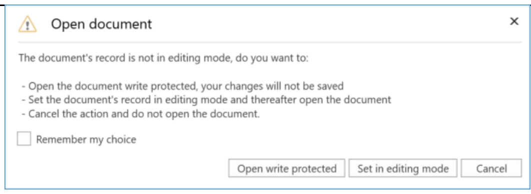


Figure 23: Select the opening state for documents

Note: It is possible to display the record document and attached HTML files in compatibility mode through a configuration. The option is accessed by right-clicking inside the document of e.g. an email that is not displayed correctly. Spell-checking is disabled in compatibility mode. If the configuration is enabled, the checkbox "Show warning when switching to email compatibility mode" is visible on the "Documents" tab. Configurations are made in cooperation with cBrain.

Function	Description
"Ask me always in what state my documents should open in"	The dialog below opens whenever a document is opened from a record that is not in editing mode. The user can choose between the options below.

Function	Description
	 **Figure 24: The "Open document" dialogue**
"Open the document in read-only mode"	The document opens in read-only mode, and changes to the document cannot be saved. This setting is primarily used when a document is to be read but not further processed.
"Open the document in edit mode"	The document opens in edit mode if the user has the right to edit the document, and the user can then start the work immediately. When the document on the record is opened, the document is automatically set in editing mode.

The "Chat" tab

After clicking on **Chat** in the "Setup" dialogue, set the chat display settings.

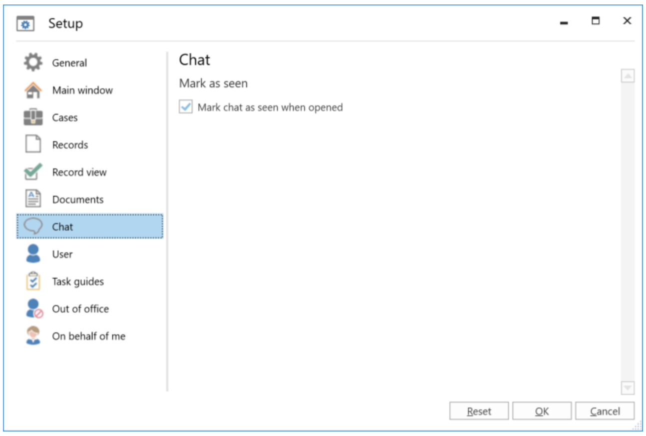


Figure 25: Setup for "Chat"

Below are the setting options for the "Chat" dialog.

Function	Description
"Mark chat as seen when opened"	Tick this box to automatically mark a chat as seen when the chat dialogue is opened.

The "User" tab

After clicking on **User** in the "Setup" dialogue, it is possible to select a default role. If a user has multiple job roles, the user can choose to display the dialogue "Role chooser" at login.

Here visually impaired users can activate F2's accessibility options to operate F2 using a screen reader.

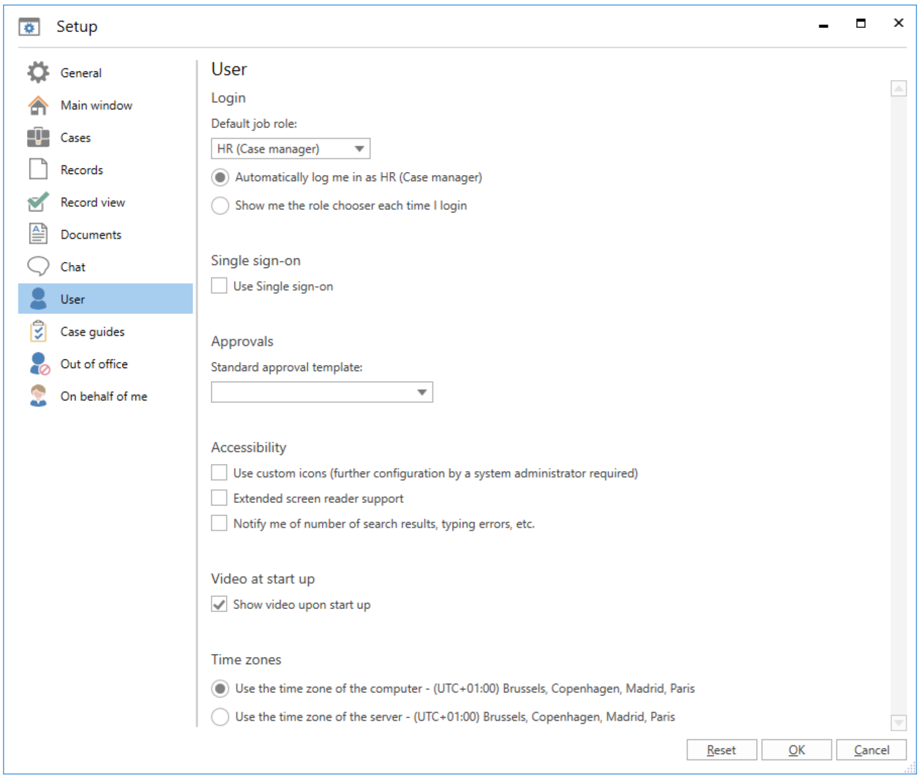
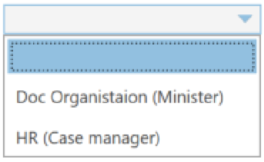


Figure 26: Setup for "User"

Below are the setting options.

Function	Description
If a user has multiple roles in F2, the "Login" settings provide a number of options for how F2 will handle these roles.	
"Default job role" 	Select the user's default role when logging in. Choose among the job roles that the user has already been assigned by a user with the "User administrator" privilege. This role is also used for email import.
"Automatically log me in as"	Select whether to automatically log in with the default job role when opening F2.
"Show me the role chooser each time I login"	If "Show me the role chooser each time I login" is selected, the dialogue "Please choose user role" appears on login.

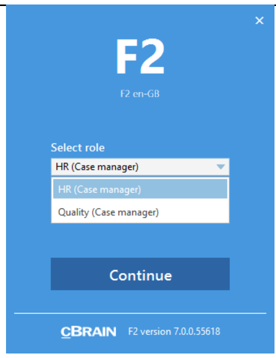
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td></td><td>


Figure 27: The "Select role" dialogue

In the dialogue, the user selects the role to be logged in as shown in the example above.

If one of the above roles is not selected, the user is automatically logged in with the default job role.
</td></tr>
<tr><td>"Use single sign-on"</td><td>
Select whether to turn off single sign-on, in which case a password must be entered to start F2.

Note: Even though the "Use single sign-on" box is unticked, it is still possible to select single sign-on when logging in. Single sign-on uses the Windows login to log in to F2.

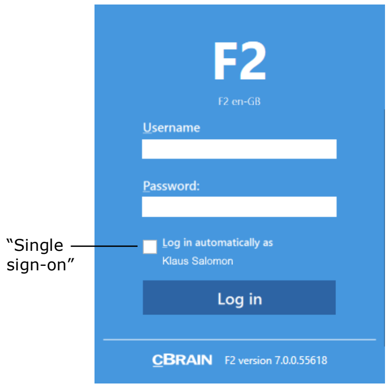


Figure 28: Login using "Single sign-on"
</td></tr>
<tr><td>"Standard approval template" (add-on module)</td><td>
Select which approval template to use as a standard when creating a new approval process.

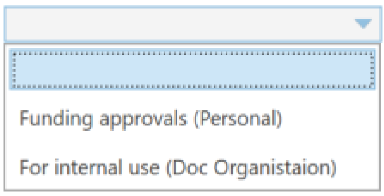


Figure 29: Select standard approval template
</td></tr>
</table>

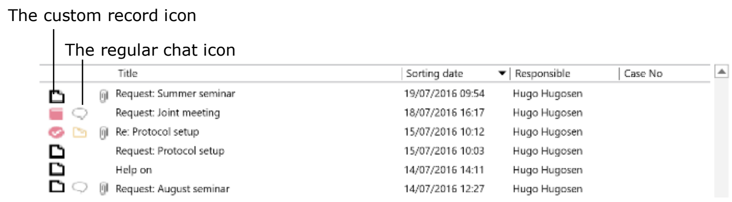
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td colspan="2">Under "Accessibility", there are a number of options for setting up and adapting the accessibility of F2:</td></tr>
<tr><td>“Use custom icons (further configuration by a system administrator required)”</td><td>Ticking this field makes it possible to replace the normal F2 icons with F2 icons in a higher contrast. That is, there is a greater difference between light and dark in the same icon as shown in the example below.


Figure 30: Example of an icon with high contrast

Note: It is possible to replace certain icons with custom ones. Such changes are made in cooperation with cBrain.

F2 must be restarted for the changes to take effect.</td></tr>
<tr><td>“Accessibility – Extended support for screen readers”</td><td>Tick the box to enable the use of a screen reader in F2.
F2 must be restarted for the changes to take effect.</td></tr>
<tr><td>“Notify me of number of search results, typing errors, etc.”</td><td>Choose how F2 notifies the user when performing searches, about warning icons, validation errors such as invalid values when entering an email address, etc.
The user is notified by a Windows notification.</td></tr>
<tr><td colspan="2">Under "Video at start up", F2's start-up video can be turned on or off.</td></tr>
<tr><td>“Show video on start-up”</td><td>Tick the box to show the video on start-up.</td></tr>
<tr><td colspan="2">Under “Time zones”, select whether F2 displays time and date using the computer’s or the server’s time zone.</td></tr>
<tr><td>“Time zones”</td><td>Choose between the F2 client’s or the server’s time zone:
• “Use the time zone of the computer”
• “Use the time zone of the server”
The selected time zone is for example displayed for clocking chats. If the user has decided to use the F2 client’s time zone he/she will see deadlines in local time e.g. when abroad. The same applies when to dates and times entered in deadlines or searches. F2 users in a different time zone will see the date and time for their own time zone.</td></tr>
</table>

Function	Description
	Dates and times generated on the server will always be displayed using the server's time zone. This applies to e.g. conversion of Word documents into PDF files. **Note**: This is a configuration option and has to be set up in cooperation with cBrain.

The "Task guides" tab (add-on module)

If the F2 add-on module "Task guides" has been purchased, the menu item "Task guides" is displayed. Click on **Task guides** in the "Setup" dialogue to view the setup options.

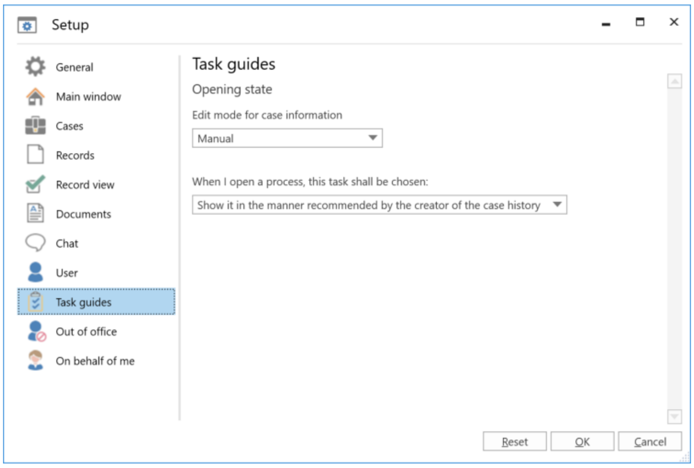
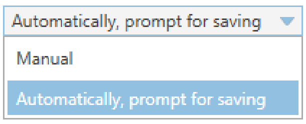
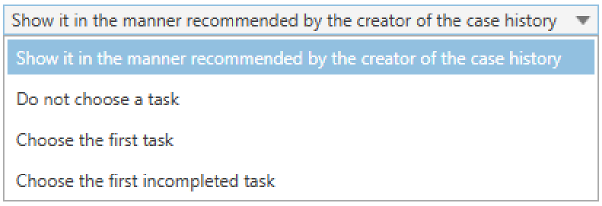


Figure 31: Setup for "Task guides"

The user setting options for task guides are described below.

Function	Description
"Edit mode for case information"	Select the editing mode for case information when the user opens a task guide. Two options exist: • "Manual" • "Automatically, prompt for saving".  **Figure 32: Select edit mode for case information**
"When opening a case guide the following task must be selected"	Select the navigation for a chosen process in the task guide. It is possible to select the starting point of a process when the user opens a task guide. Choose between: • "Show it in the manner recommended by the creator of the case history".

Function	Description
	• “Do not choose a task”. • “Choose the first task”. • “Choose the first incompleted task”.  **Figure 33: Select which task to select when opening a case guide**

The “Out of office” tab

Click on **Out of office** in the “Setup” dialogue to create an automatic out of office message. The automatic message applies to internal communication in F2. External senders may also receive the auto-reply if the organisation has enable this in the email account’s configuration.

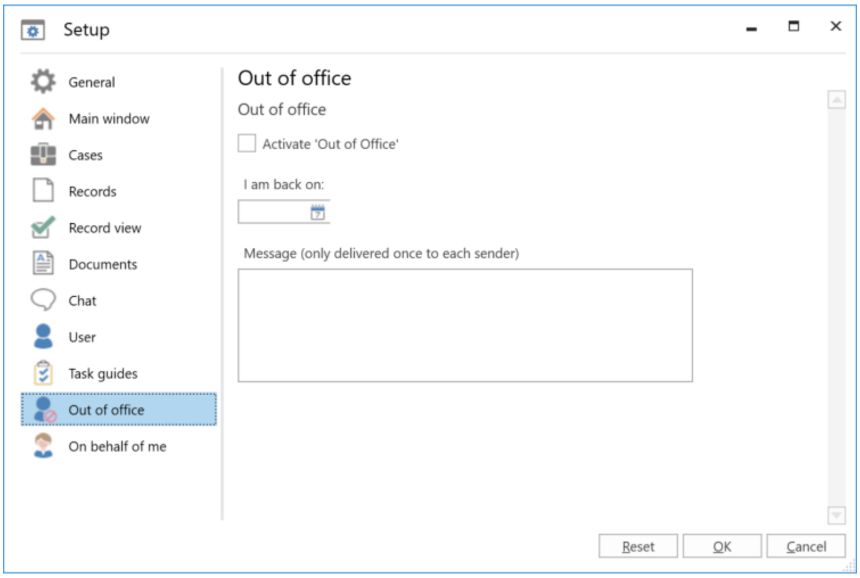
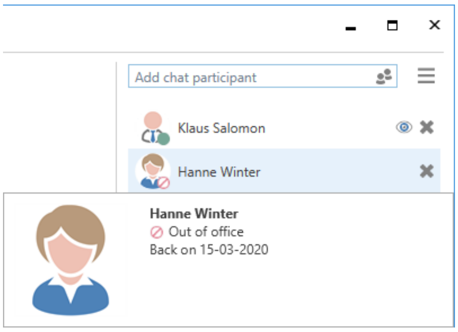


Figure 34: Setup for “Out of office”

The setup options are described below.

Function	Description
Set the “I am out of office” auto-reply under “Out of office”:	
“Activate ‘Out of Office’”	Tick this box to indicate that the user is not present due to vacation, sick leave, etc. When the box is ticked, the “Out of office” feature is activated and sends an auto-reply when the user receives an email in F2.

Function	Description
	Note: The box has to be manually unticked once the user is present again. As displayed in the figure below, the user image will display the "out of office" icon. Hovering the mouse over the user on the participant list in chats/notes shows that the user is out of office and when he/she will be return.  **Figure 35: Out of office in chat**
"I am back on:"	Specify the date that the user will be return.
"Message (only delivered once to each sender)"	Enter an auto-response which will be sent to users when trying to the user who is out of office. **Note**: The automatic message is sent to each sender only once, even if the user receives multiple emails from the same sender.

Note: It is possible to save the "Out of office" settings, while logged in on behalf of another user. Other user settings are not saved when logging out or changing to another "on behalf of" user.

The "On behalf of me" tab

Click on **On behalf of me** to assign privileges to another user, so he/she can act on behalf of the unavailable user.

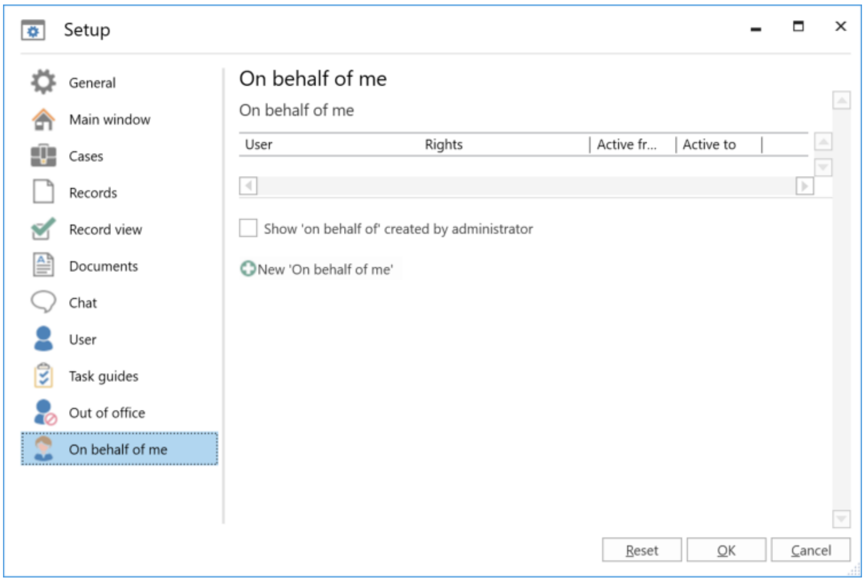


Figure 36: Setup for "On behalf of me"

The setting options for "on behalf of" privileges granted to another user (colleague) are described below. This function allows a colleague to act on behalf of the user.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>"On behalf of me"</td><td>

If "on behalf of" privileges have been granted another user, it is possible to see the following in the overview:

- To whom the privileges have been given.
- The area covered by the privileges.
- The duration of the privileges.

The privileges can be withdrawn/deleted by clicking the ✖ next to the user with the privileges.

"On behalf of" privileges are automatically deleted once the "Active to" date has passed.

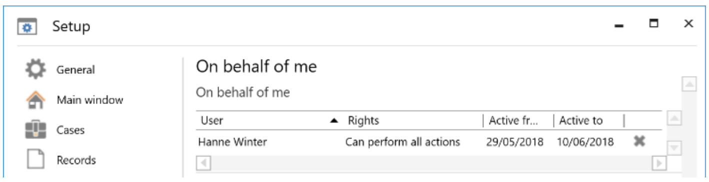


Figure 37: The "On behalf of" overview

</td></tr>
<tr><td>"Show 'on behalf of' created by administrator"</td><td>Tick this box to view the "on behalf of" privileges that have been granted by a user with the "On-behalf-of administrator" privilege.</td></tr>
<tr><td>"New 'On behalf of me'"</td><td>This opens the following dialogue:</td></tr>
</table>

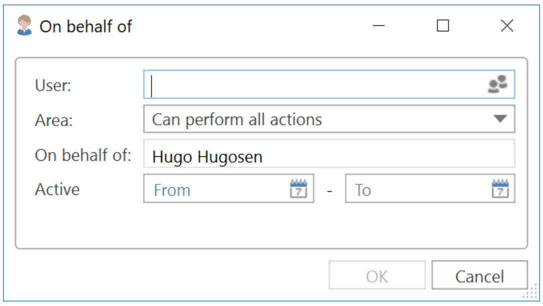
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>New 'On behalf of me'</td><td>


Figure 38: Assign "on behalf of" privileges

Specify the following:

- In the "User" field, enter the name of the colleague who should be assigned "on behalf of" privileges.
- In the "Area" field, enter which privileges the user should be given. It is possible to choose between "Can perform all actions" and "Can handle approvals" (add-on module).
- In the "On behalf of" field, enter the user on whose behalf the colleague is acting.
- In the "Active" field, specify the time for the "on behalf of" privileges. If no dates are entered, the "on behalf of" privileges will be active for an unlimited time.
- Click on **OK** to complete the act of granting "on behalf of" privileges.
</td></tr>
</table>

Note: It is possible to save the "Out of office" settings, while logged in on behalf of another user. Other user settings are not saved when logging out or changing to another "on behalf of" user.

User settings

A user can retrieve a default user setting or a partial user, list or column setting. These defaults contain setups from a specific user, list or column setting that state which columns are shown in the result list, the order of the columns, the column width, how the columns are sorted and the grouping of columns if applicable.

Users who have the “Settings administrator” privilege can create and adjust the user settings for the users’ different roles, as different roles typically require different setups. Read more in the *F2 Desktop – Administrator*.

Click on **User settings** in the “Setup” tab in F2’s main window to open the dialogue “User settings”.

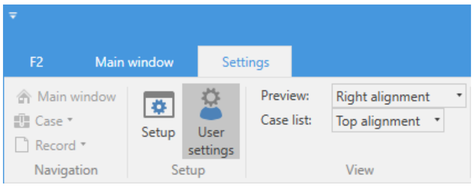


Figure 39: The menu item “User settings”

In the dialogue it is possible to view the created user settings. Click on the desired user setting, and the menu item “Use this user setting” will become active as shown below.

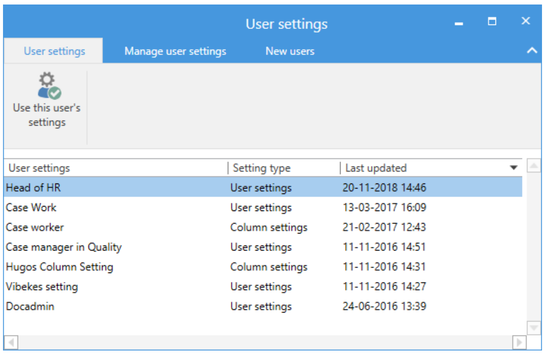


Figure 40: The “User settings” dialogue

Click on **Use this user setting** to overwrite the existing user settings. A notification appears with the text “You have now the column settings from [user setting title]”.

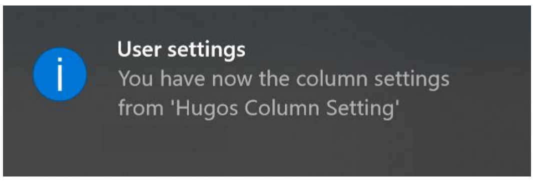


Figure 41: Use this user setting

Note: When new user settings are retrieved, F2 must be restarted for the settings to take effect. The new user settings will overwrite any previous changes to the user settings.

User images

It is possible in F2 to add images for F2 users, units, and external participants. The images are displayed on the participant's master record for units, users and external participants. For users of F2 the image is also displayed in the chat window and in the user identification in the upper right corner of the main, record, and case windows.

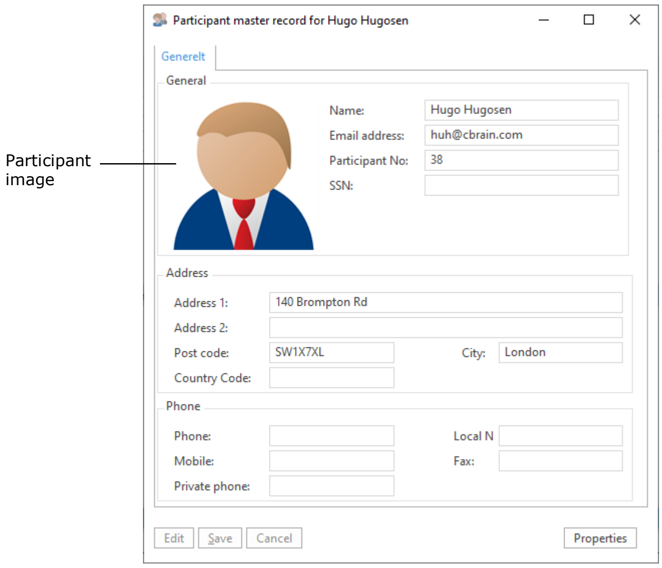


Figure 42: The image on the participant master record

Note: It is only possible to add, change and remove the image of one's own user and for external participants. Only users with the "User administrator" privilege can add, change, or remove images for units and other F2 users.

Add, change or remove an image

It is possible to add, change and remove images for users, units and external participants in the participant register. To add or change an image, select "Change image" in the right-click menu of the participant in the participant register.

To open the participant register, click on **Contacts** in the navigation bar. Right-click on the wanted participant and select **Change image**. To remove an image, select "Remove image" from the right-click menu.

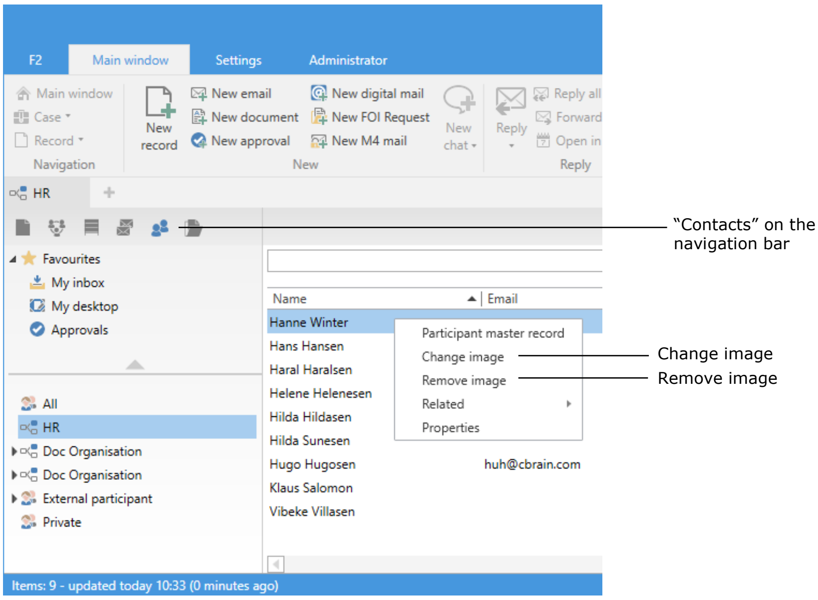


Figure 43: The context menu for participants

In the "Change image" dialogue, select an image from either a local or external drive using the **Browse** button. Use the zoom buttons **-** and **+** to adjust the size of the selected image. Then click on **OK**. The image is now either added, possibly replacing an older image.

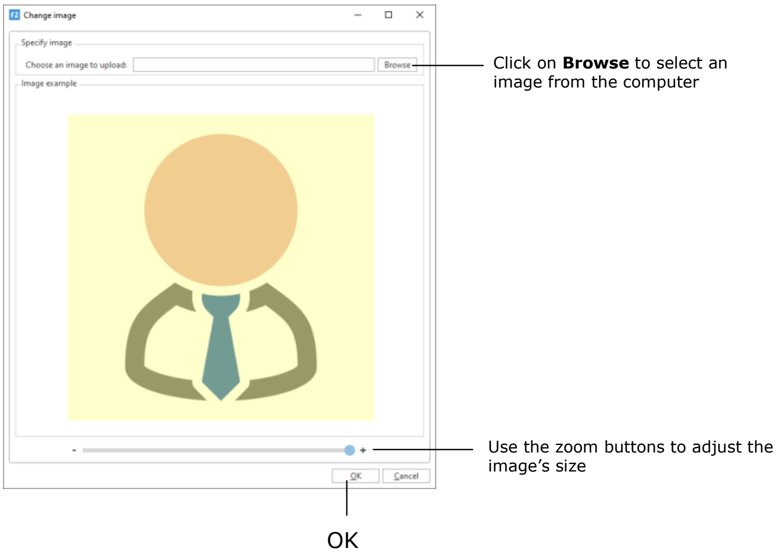


Figure 44: The "Change image" dialogue

F2 users can also change the image using the user identification located in the upper right corner of the main, record and case windows.

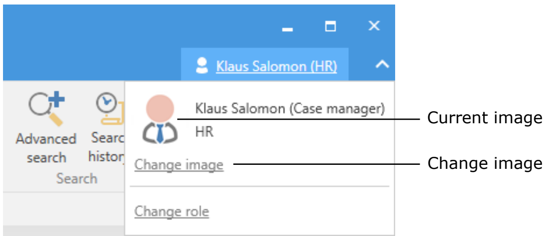


Figure 45: Change the image through the user identification

Setup of the views in F2

On the “Settings” tab it is possible to control the list and folder views in F2. The view can be adjusted for every individual list, search and folder. For more information, see the section *Setting up the* .

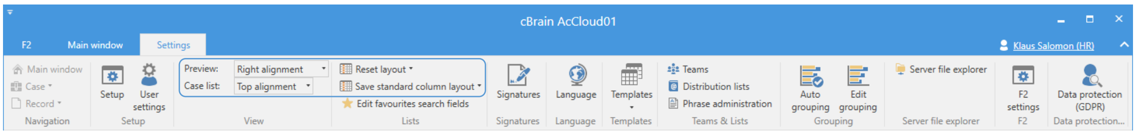
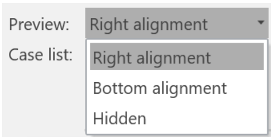
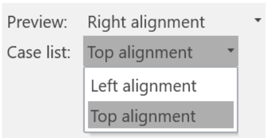
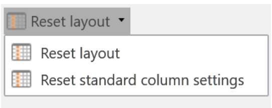


Figure 46: View settings under the “Settings” tab

The menu items “Preview”, “Case list”, “Reset layout” and “Save standard column layout” are described below.

Function	Description
“Preview”  	A preview of a record document or the first few pages of an attachment will be shown in a separate window when the user clicks on a record. The preview is an effective tool to gain an overview of the contents of a specific record. The preview display options are: • “Right alignment” • “Bottom alignment” • “Hidden”. Selecting “Hidden” hides the preview. **Note**: For large files, only a limited number of pages will be shown in the preview. When this occurs, F2 will inform the user.
“Case list”  	Choose where to display the case window in the “Show cases” view. The options are “Left alignment”, which displays cases to the left and associated records to the right, and “Top alignment”, which displays cases above the associated records.
“Reset layout”  	“Reset layout” overwrites the user’s current column layout settings. If the user has saved any standard column settings these will be retrieved, otherwise the global default layout settings will be used. “Reset standard column settings” removes the user’s saved standard column settings and replaces them with the global default column settings.

Function	Description
"Save standard column layout" Save standard column layout	This operation overwrites any previously saved standard column settings (for the chosen list, search or folder) and replaces them with the new column settings.

There are three different layout levels for column settings in F2. These are basic, standard and personal column settings.

Function	Description
Basic column settings	These settings are delivered with F2 and are non-changeable.
Standard column settings	These settings are configured by a user with the "Result list administrator" privilege. These are configured when a new non-personal search is created. F2 then saves this layout as the standard layout.
Personal column settings	These settings are setup by the user him/herself. If a user changes the layout a personal layout is created for the chosen search.

When a saved search is chosen, F2 searches for the personal layout related to that search. If this cannot be found, F2 instead searches for the standard layout for that search. If this cannot be found either, the basis layout is used.

Signatures

Click on the menu item **Signatures** in the “Settings” tab to create or edit a signature.

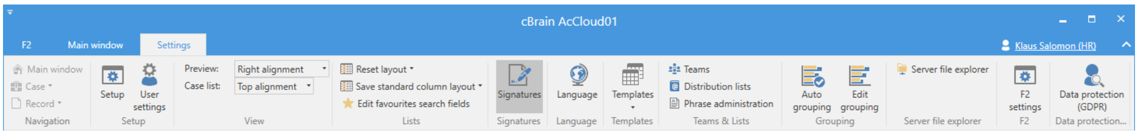


Figure 47: The menu item “Signatures” under the “Settings” tab

There are no limits as to how many signatures a user can have in F2. However, it is only possible to choose one signature to add to a record when it is opened.

Create a new signature

Click on **Signatures** to open a dialogue that provides an overview of the user’s signatures.

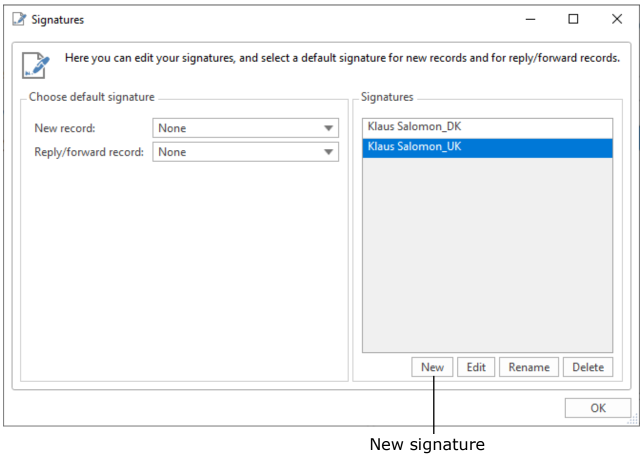


Figure 48: Create signature

Click on **New**. A dialogue, shown below, then opens, and a name for the new signature is entered.

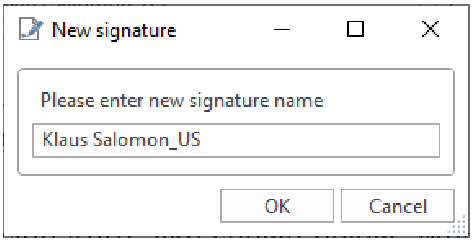


Figure 49: Name the new signature

After entering the name of the new signature, click **OK**. A window then opens in which the user can edit the signature, like shown below. When the signature is finished, click **OK**.

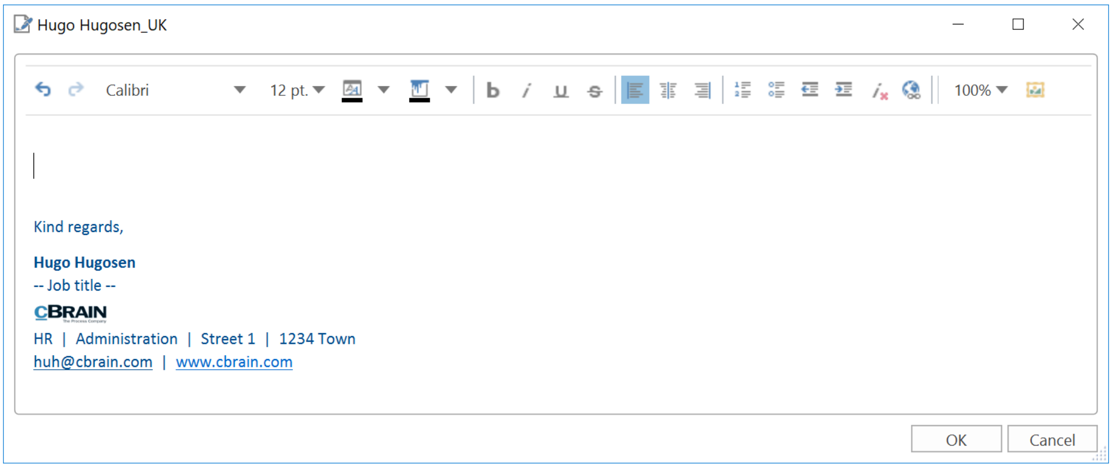


Figure 50: Editing signature

Insert signature

A signature can be inserted directly in the record document. To do this, click on **Insert** on the record, and the signature text will be placed in the record document where the cursor is located.

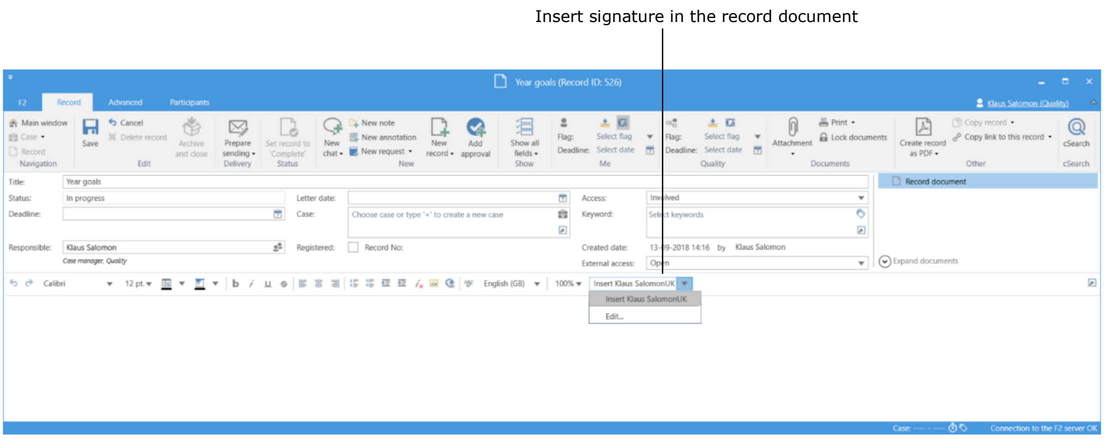


Figure 51: Insert signature

It is possible to configure F2 to insert a signature when a new record is created. This also applies to emails that are replied to or forwarded. Under the menu item “Signatures”, choose if F2 should insert the signature chosen as standard for the fields “New record” and “Reply/Forward record” by using the drop-down menu. Both fields are set to “None” by default.

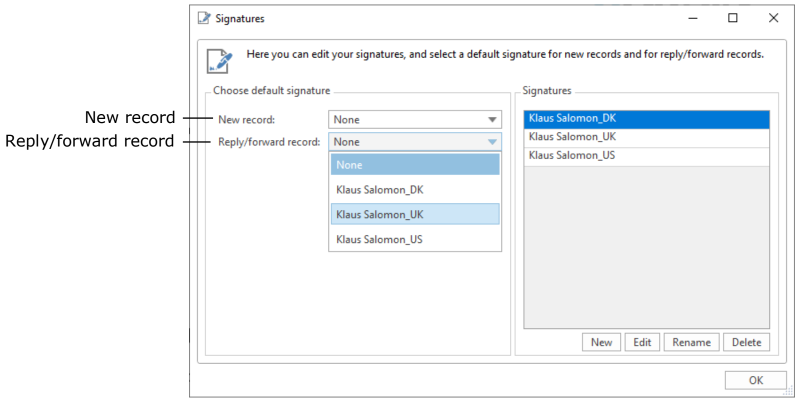


Figure 52: Add signature

Edit existing signatures

An already existing signature can be edited, renamed or deleted.

- To edit an already existing signature, select it and click on **Edit**.
- To rename an already existing signature, select it and click on **Rename**.
- To delete an already existing signature, select it and click on **Delete**.

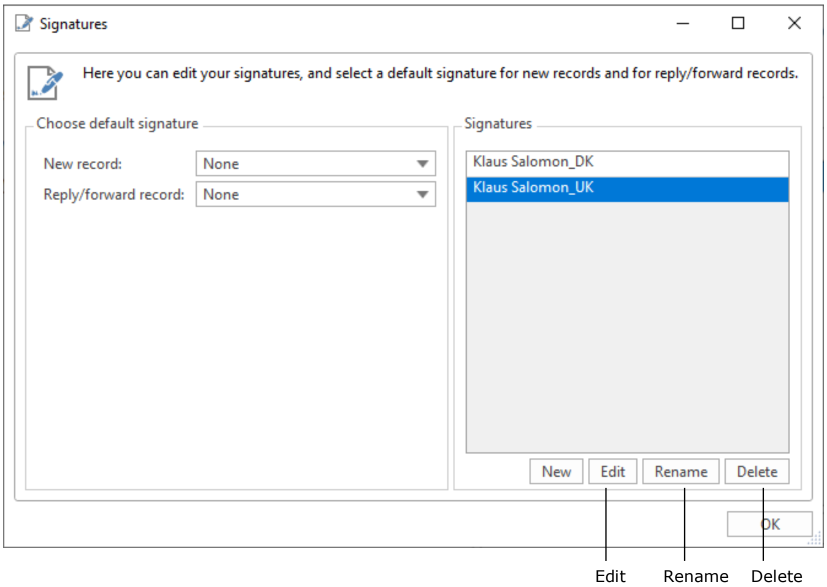


Figure 53: Edit, rename or delete signature

It is possible to add, edit and delete signatures in two ways in F2. Either as shown above using the menu item "Signatures" on the "Settings" tab, or by performing the action directly from a record.

Edit or insert signature

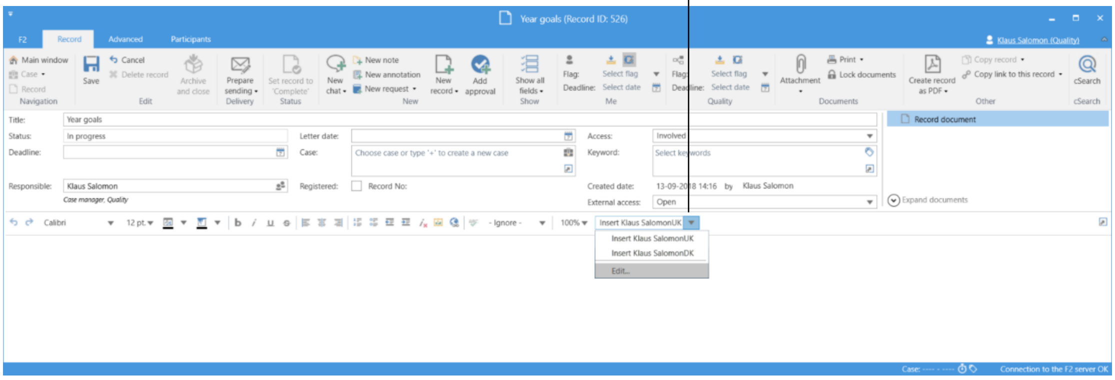


Figure 54: Add, edit or delete a signature in an email

Language

The menu item “Language” is found under the “Settings” tab. Languages other than the customer’s primary language are add-on modules.

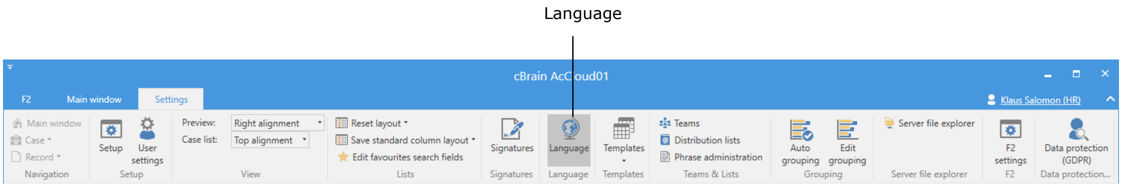


Figure 55: The menu item “Language” under the “Settings” tab

Depending on the languages with which the F2 installation has been configured, it is possible to choose between languages when logging in. Currently it is possible to choose between the following languages: Danish, English and German.

To change the language, click on the **Language** menu item. The following dialogue appears.

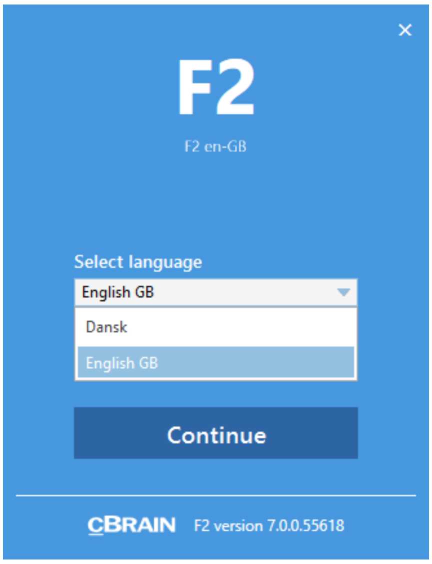


Figure 56: Select language

Note: F2 will restart when a new language has been selected.

Templates

In F2 it is possible to save templates for Office programs. These templates can be used when new documents are created in F2. The menu item “Templates” can be found on the “Settings” tab in the main window.

Using the menu item “Templates” it is possible to administrate document and approval templates for an authority.

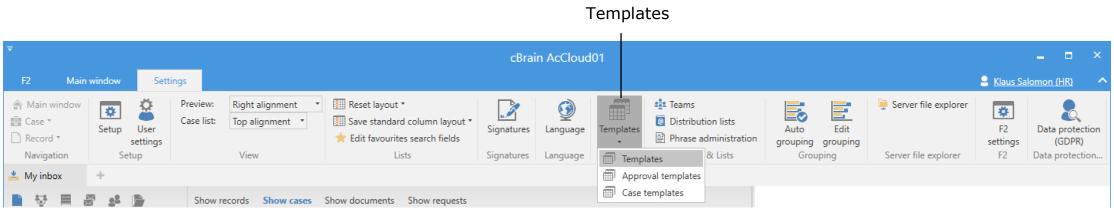


Figure 57: The menu item “Templates” under the “Settings” tab

All users can create private document templates to use for daily work. A document template can be made available for the entire authority or for an individual unit under the authority by a user with the “Template administrator” privilege.

Depending on the F2 installation and the users’ privileges, between one and three types of templates will appear when clicking on **Templates**:

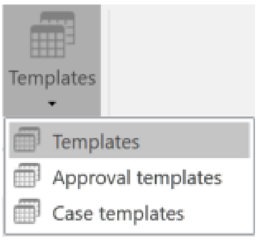


Figure 58: Select templates

In the example above it is possible to choose between templates for either documents, approvals and cases.

A user must have the “Can create case templates” privilege to create and edit case templates. Read more in *F2 Case templates – User manual*.

Any user can create approval templates. Read more about creating approval templates in *F2 Approvals – User manual*.

The “Templates” dialogue

Click on **Templates** and the dialogue below will appear. Here the authority’s and the user’s personal templates will be displayed.

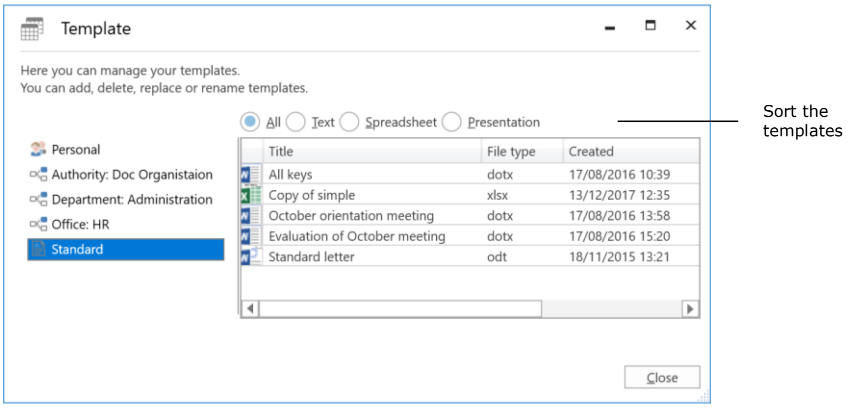


Figure 59: Template maintenance

The document templates can be sorted by the following categories: “All”, “Text”, “Spreadsheet” or “Presentation”.

In the F2 installation depicted above, it is possible to create templates for:

Type	Description
Personal	The user’s private document templates.
Authority	Document templates that are accessible for all users in the specific authority.
Department	The department’s document templates can be used by all users in the department along with all underlying units.
Office	The office’s document templates can be used by all users in an office.

In this dialogue it is possible to create, delete, move and/or rename document templates. Right-click on a unit or folder and the following options appear:

- **Add template** to upload new Office templates.
- **Rename folder** to change the name of an already existing folder.
- **Delete folder** to delete a folder.
- **Create folder** to organise the document templates.

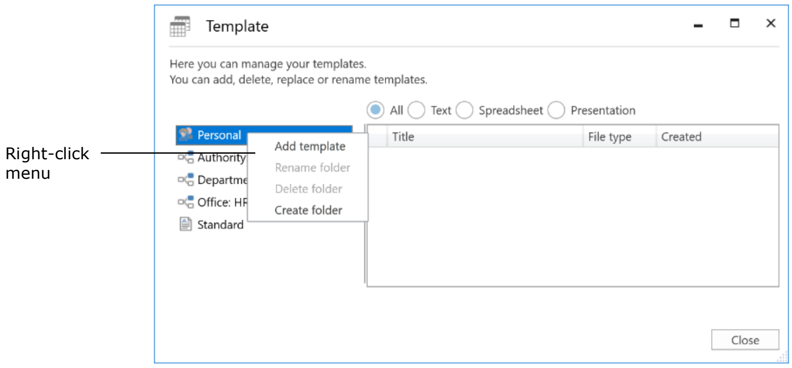


Figure 60: The menu that appears when right-clicking on a unit or folder

Right-click on a document template and the following options will appear:

- **Properties** to correct an existing document template's properties, e.g. its title.
- **Save copy** to download a copy of an existing document template.
- **Replace content** to upload a replacement file for an existing document template.
- **Delete** to remove a document template.

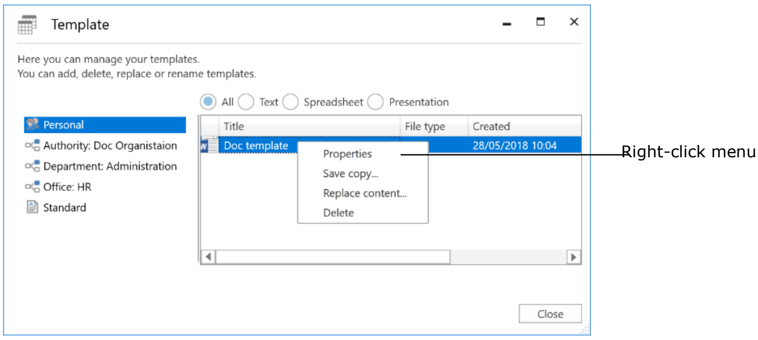


Figure 61: The menu that appears when right-clicking on a template

The menu items of the right-click menu are described below.

Function	Description
"Properties"	Click on **Properties** in the right click menu to open the dialogue "Document properties".

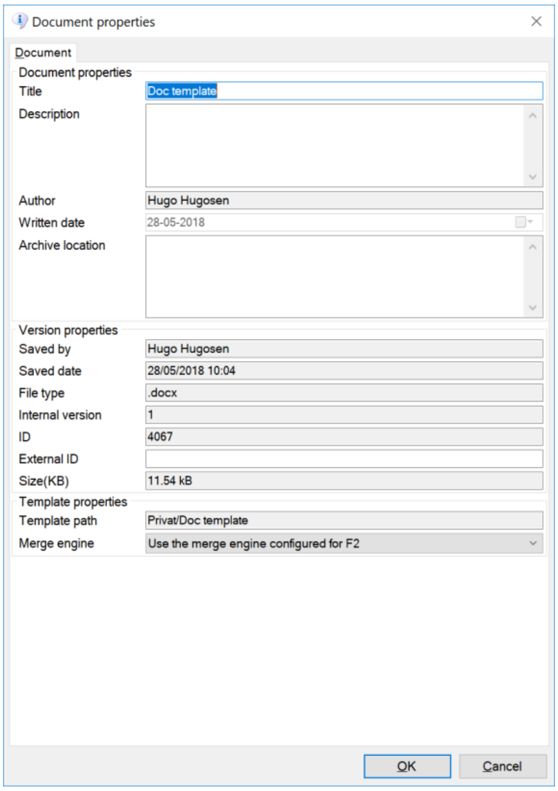
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td></td><td>


Figure 62: Document properties

Here it is possible to change the title of the document template.

It is also possible to view information about the template, e.g. it’s the creator of the document on which it is based, the user who saved the template, when it was saved, etc.

“Size (KB)” displays the document template’s file size. The path for the template is also shown.
</td></tr>
<tr><td>“Save copy”</td><td>Select “Save copy” to save a copy of the document template file, either locally or on an external drive.</td></tr>
<tr><td>“Replace content”</td><td>Select “Replace content” to replace the chosen document template file with a file from an external drive.</td></tr>
<tr><td>“Delete template”</td><td>Select “Delete template” to delete the document template. Click on **Yes** in the dialogue to confirm the action.

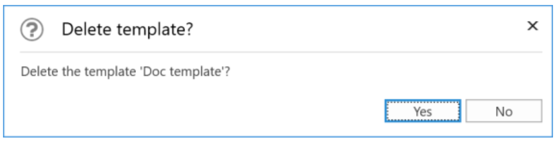


Figure 63: Delete template
</td></tr>
</table>

Adding a new document template

Document templates for use in F2 must be generated outside F2 and then imported. To do this, right-click on the folder or unit where the document template should be placed and then click on **Add template**.

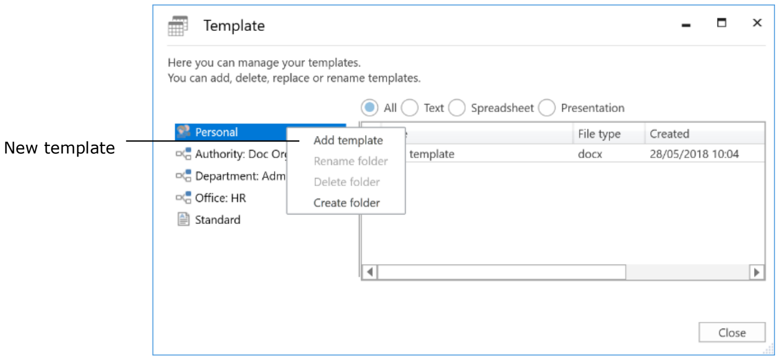


Figure 64: Create new template

Click on **Browse** in the "New template" dialogue to import the chosen document template from an external drive.

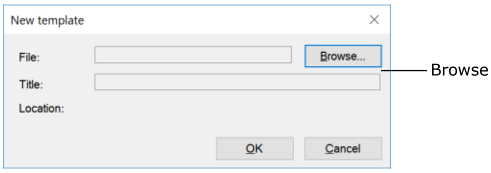


Figure 65: Add new template

Give the document template a title. If the user has permission to establish department or authority templates, it is possible to select a location for the document template.

Distribution lists

All users can create personal distribution lists. However, only users with the "Distribution lists editor" privilege can create and manage the joint distribution lists in F2.

It is possible to add other units and users (also from other F2 authorities) along with external participants to a distribution list. This allows for a list that contains a mix of participants from the user's own authority and participants from other authorities, units and external participants.

It is also possible to add a distribution list to another distribution list along with units, external participants and individual users. This makes updating distribution lists easier as distribution lists that contain the original list will automatically be updated, when the original list is updated.

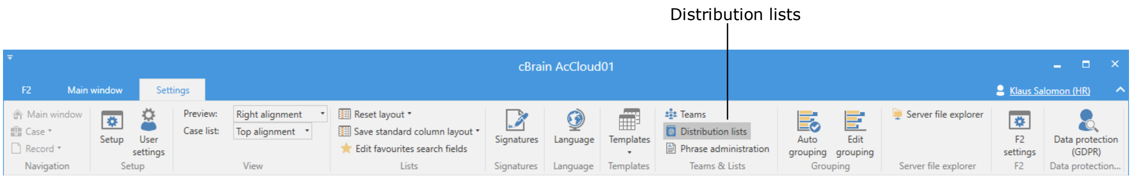


Figure 66: The menu item "Distribution lists" on the "Settings" tab

The "Distribution lists" menu item opens the window described below.

The "Distribution lists" window

It is possible to create new distribution lists and manage existing ones in the "Distribution lists" window. The distribution lists can be sorted using the following columns: "Name", "Last updated", "Created" and "Visibility".

The "Visibility" column indicates whether a distribution list is private or shared. A private list is given the visibility value "Me", while a shared distribution list is given the visibility value "Everyone".

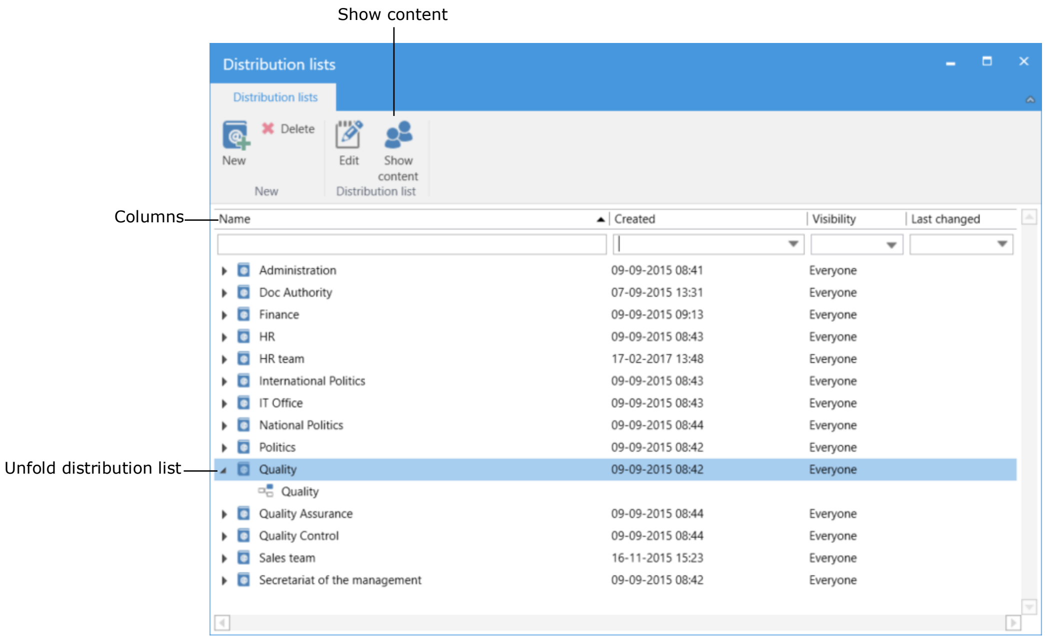


Figure 67: The "Distribution lists" window

The distribution list's content is displayed by expanding the node. For a more detailed overview of a distribution list, select a list and click on **Show content** in the ribbon. This opens the dialogue "Show content: [Distribution list]" that shows the content of the distribution list at the time of opening.

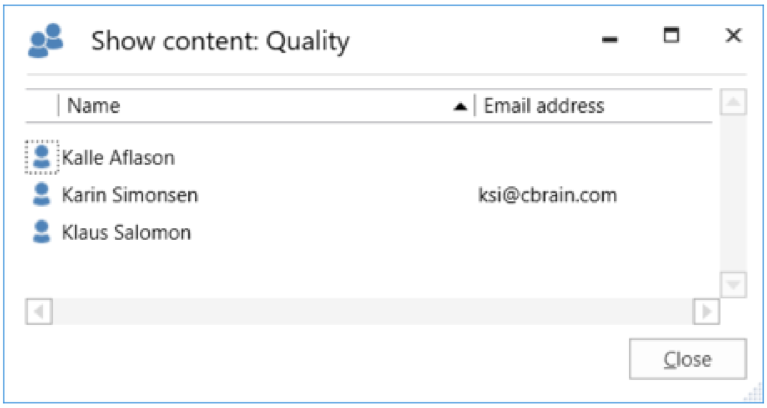


Figure 68: The dialogue "Show content: [Distribution list]"

Create a distribution list

To create a new distribution list, click on **New** in the "Distribution lists" window.

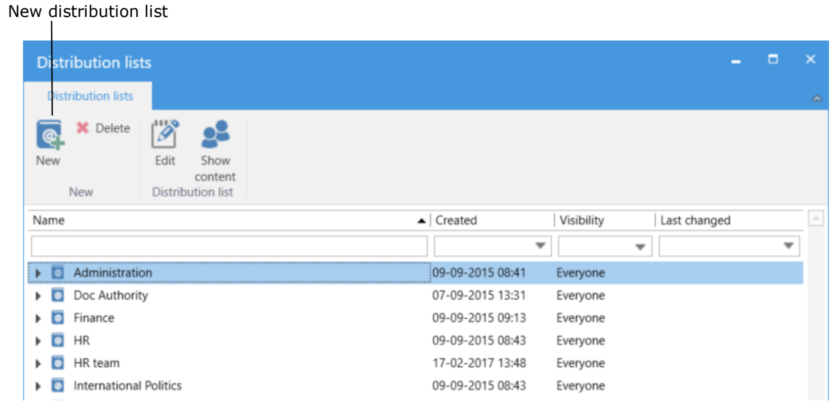


Figure 69: Create a new distribution list

The dialogue "New distribution list" opens. Give the distribution list a name and select the list's visibility using the "Who can see the list?" dropdown menu. Select "Me" for a private list, and "Everyone" to create a shared list.

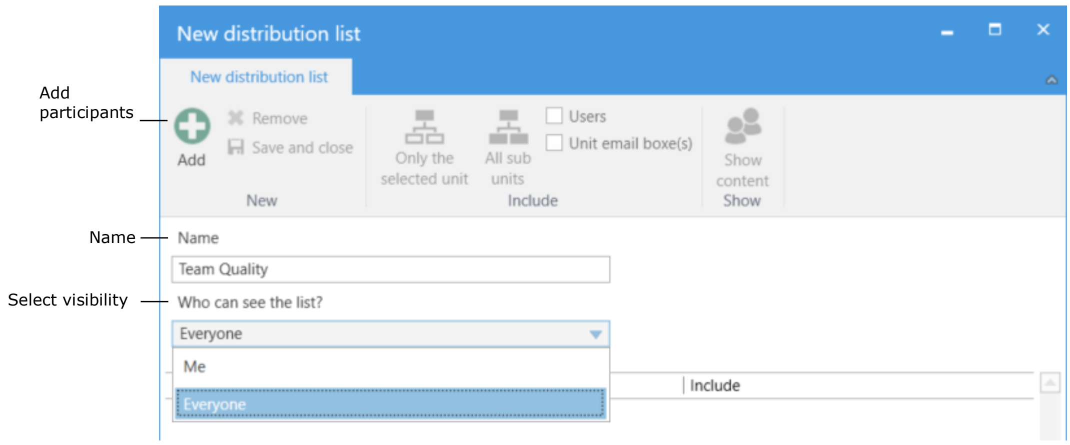


Figure 70: The "New distribution list" dialogue

Click on **Add** to select units and/or users (participants) to add to the distribution list.

Select the participants for the distribution list in the "Select participants" dialogue. Add a participant by either double-clicking on the participant or select the participant and click on **Add participant(s)**.

It is also possible to perform an advanced search for participants by clicking on **Advanced search**. For more information on advanced searches, see the manual *F2 Desktop – Searches*.

When the desired participants have been added to the list, click on **OK**.

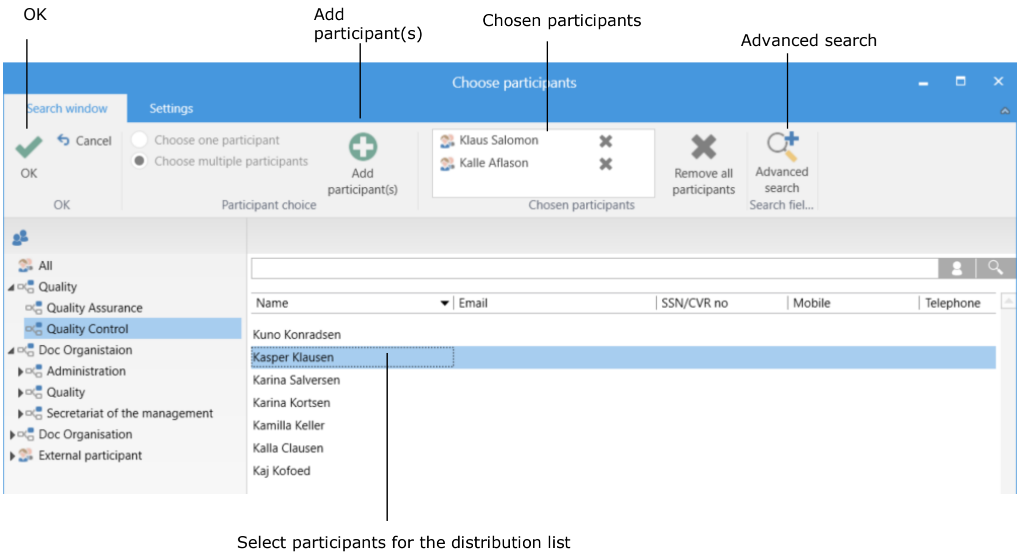


Figure 71: Selecting participants for a distribution list

Click on **OK** in the above dialogue to return to the "New distribution list" dialogue. Here the user can add users and/or units on hierarchical sublevels to the list by using the functions of the menu group "Include", shown below.

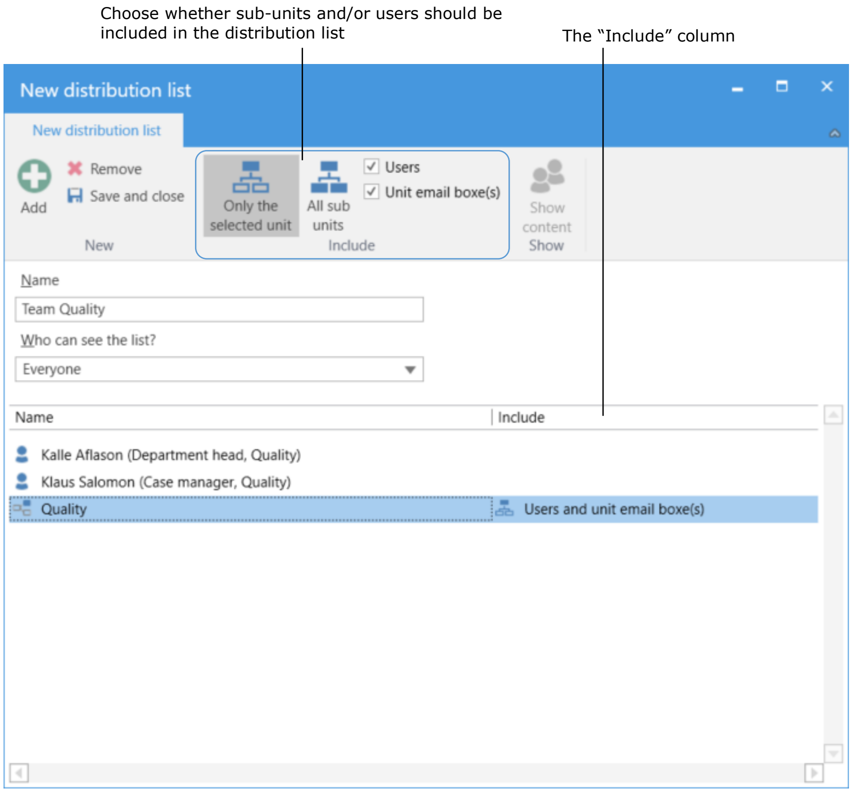


Figure 72: Include units and users from the selected units

Click on **Save and close** when the editing of the distribution list is finished. The distribution list is then created.

Note: Distribution lists must be given a unique name. It is not possible to create two private or two shared distribution lists with the same name.

Note: It is not possible to change a distribution list's visibility after it is created.

Private distribution lists

A user who does not have the distribution list editor privilege can only create new distribution lists with the visibility "Me". A shared distribution list must have the visibility value "Everyone".

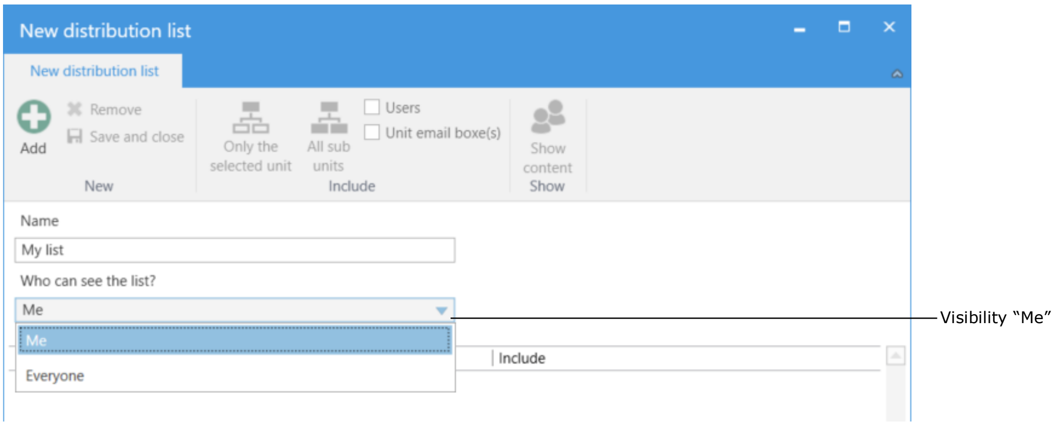


Figure 73: Create a private distribution list

Edit and delete distribution lists

Distribution lists created by the user can be edited and/or deleted. This is done by selecting a list in the "Distribution lists" window and clicking on either **Edit** or **Delete**.

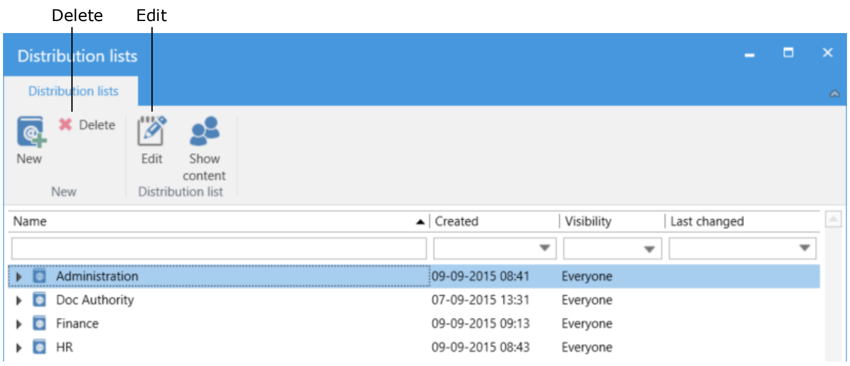


Figure 74: Edit or delete a distribution list

Click on **Edit** to open the "Edit distribution list" dialogue. Here it is possible to add and/or remove participants by clicking on **Add** or **Remove**.

Click on **Save and close** when the editing is finished.

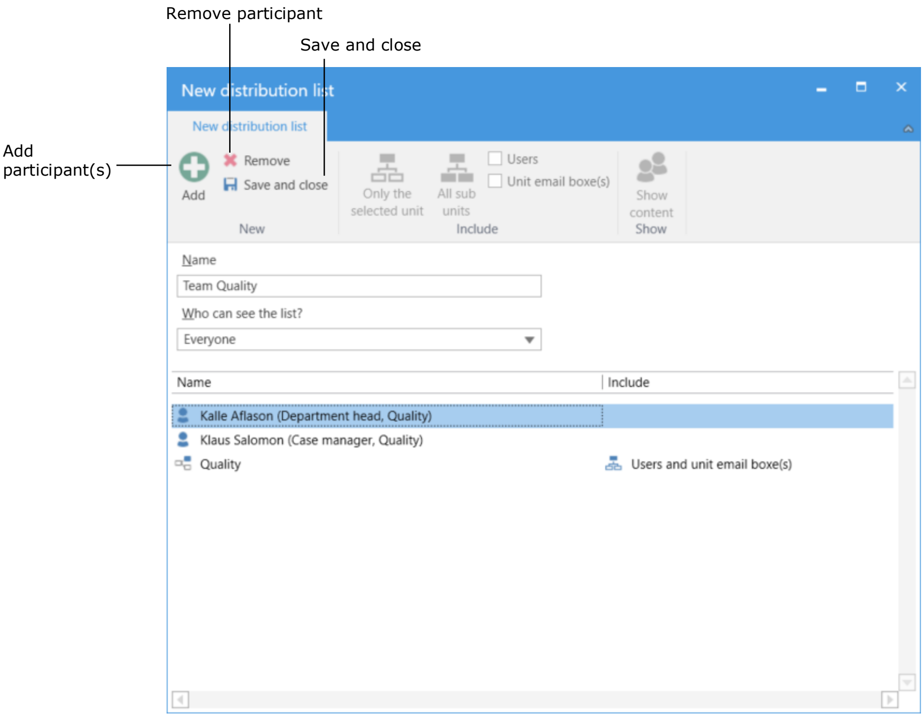


Figure 75: Edit distribution list

To delete a list, click on **Delete** in the "Distribution lists" window to open the dialogue shown below. Click on **OK** to delete the selected distribution list. Click on **Cancel** to cancel the action and keep the distribution list.

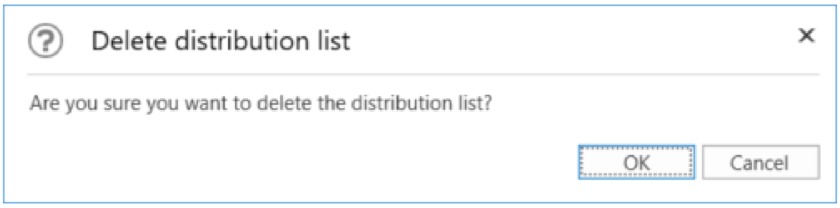


Figure 76: Delete distribution list

Setting up the result list

The result list can be personalised. As with all column views in F2, it is possible to adjust the width and placement of the columns in the results list.

To change the order of columns, simply drag and drop the columns so they appear in the wanted order. The width of a column can be adjusted by pulling it until it has the desired width. An overview of columns and their use can be found in the section *Columns – Selecting metadata fields in the result list.*

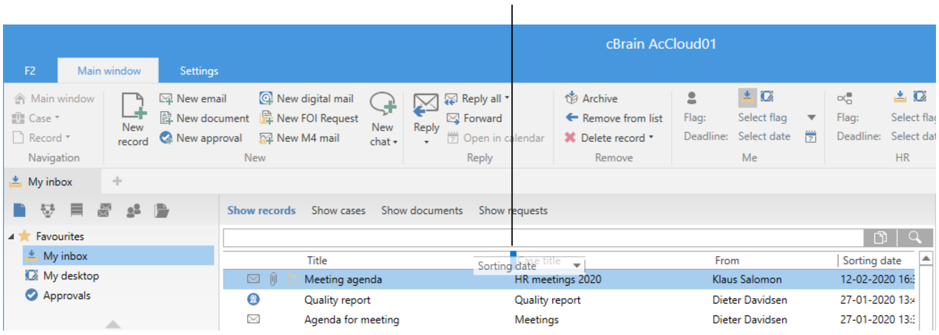


Figure 77: Moving columns in the result list

To sort the result list, click on a column title and the list will be sorted according to the column's values. If the result list is sorted by title, it will appear in alphabetical order (either a-z or z-a). If the result list is sorted by letter date, it can be sorted in numerical order (either 0-9 or 9-0).

> **Tip**: The result list can be sorted further by holding Shift and then clicking on a second column. For example, first sort the result list by "Responsible", then hold **Shift** and click on the "Title" column. The list items will then be sorted by each "Responsible" as shown below.

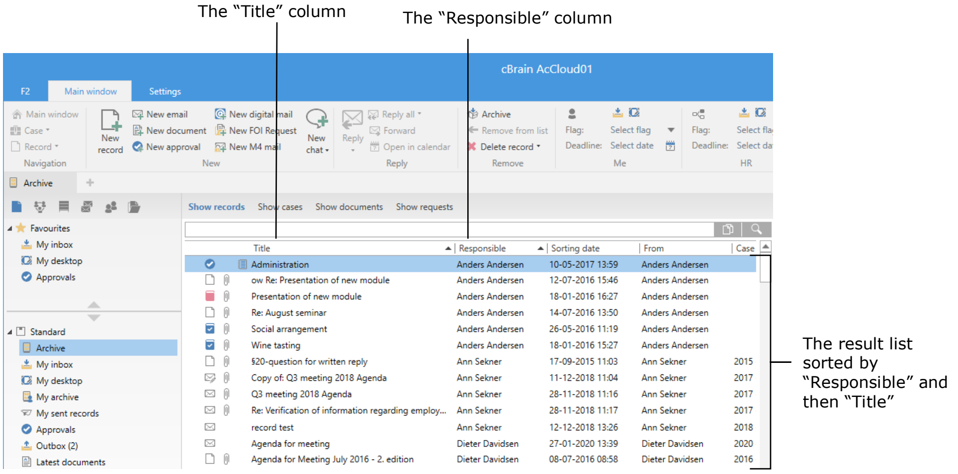


Figure 78: Sorting the columns in the result list

Columns – Selecting metadata fields in the result list

A user can select which metadata fields to display as columns in the result list. Right-click on a column, and then click on **Columns** in the right-click menu that appears. The column selector will open.

The number of columns may vary from installation to installation. Some of the columns described here only appear if the installation contains one or more add-on modules.

The list view – whether it is showing records, cases, documents or requests – determines which columns can be selected.

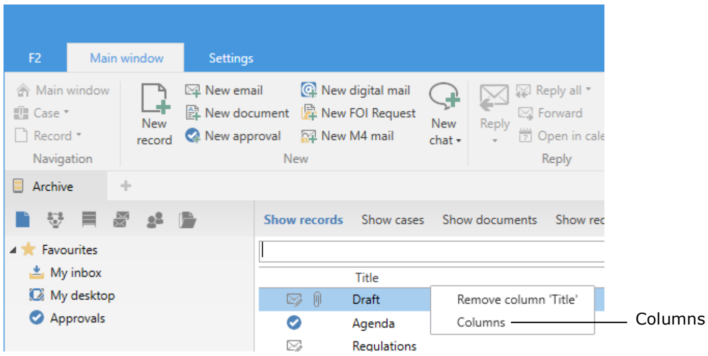


Figure 79: Open the column selector

The figure below shows the column selector. This dialogue provides an overview of all the columns that can be selected. It is possible to search for a column title by using the search field.

By default, all column titles are shown in the dialogue. Tick the box “Show only selected columns” to display the selected columns only.

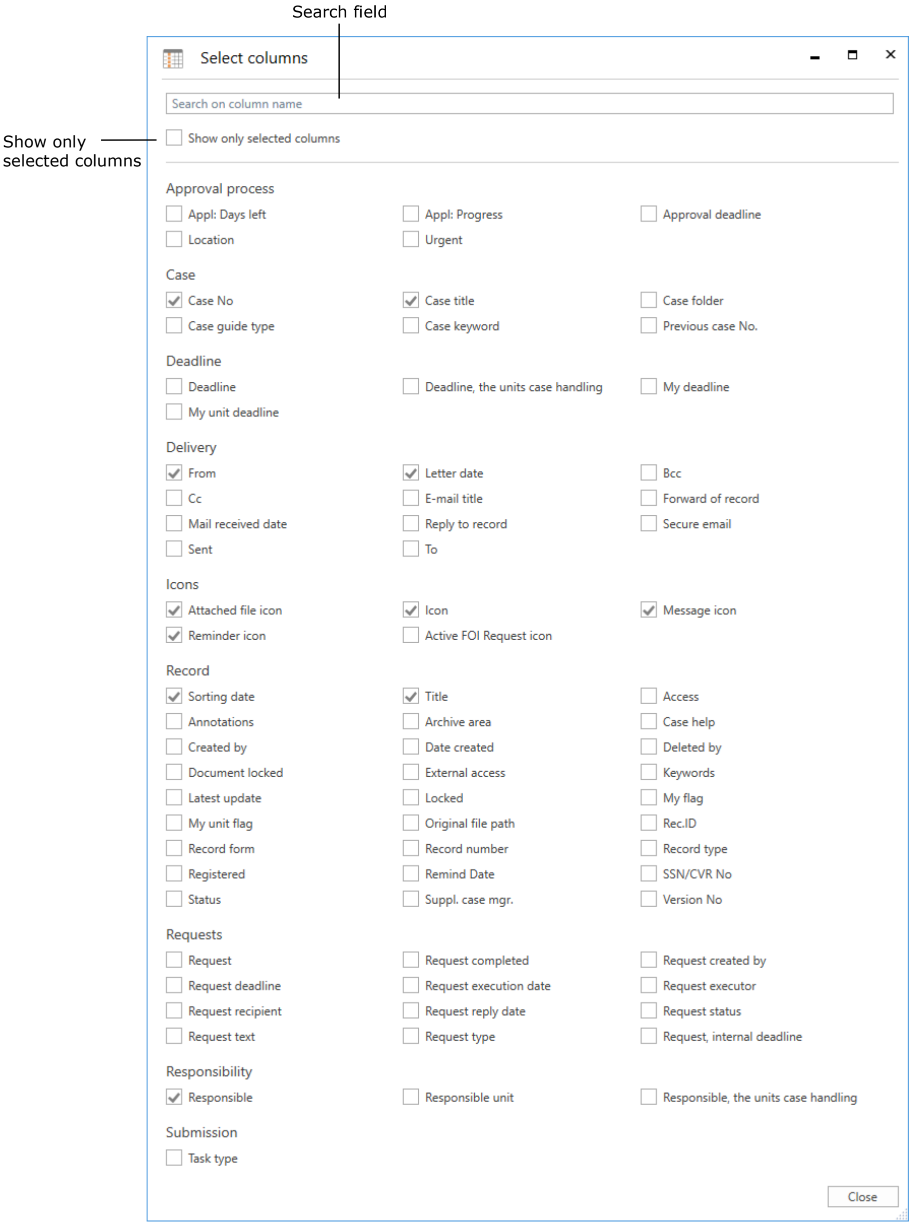


Figure 80: The column selector

Select or deselect a column by ticking or unticking the box next to its title.

Note: If all columns are removed by mistake, right-click on the blank column bar to access the column selector.

All permanent lists, including personal lists, have their own layout. If the user changes a layout, it is only changed for the chosen list.

A complete list of all the columns and their purposes can be found in the manual *F2 Desktop – Searches*.

List of Figures