F2 Desktop

The main window

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.

The main window’s structure

The main window is what users see when logging into F2. Here users keep track of their tasks, read incoming emails, chats and requests, search for specific records and cases, create records for internal or external communication, etc. The users’ lists and personal searches are also found here.

F2’s main window is shown below.

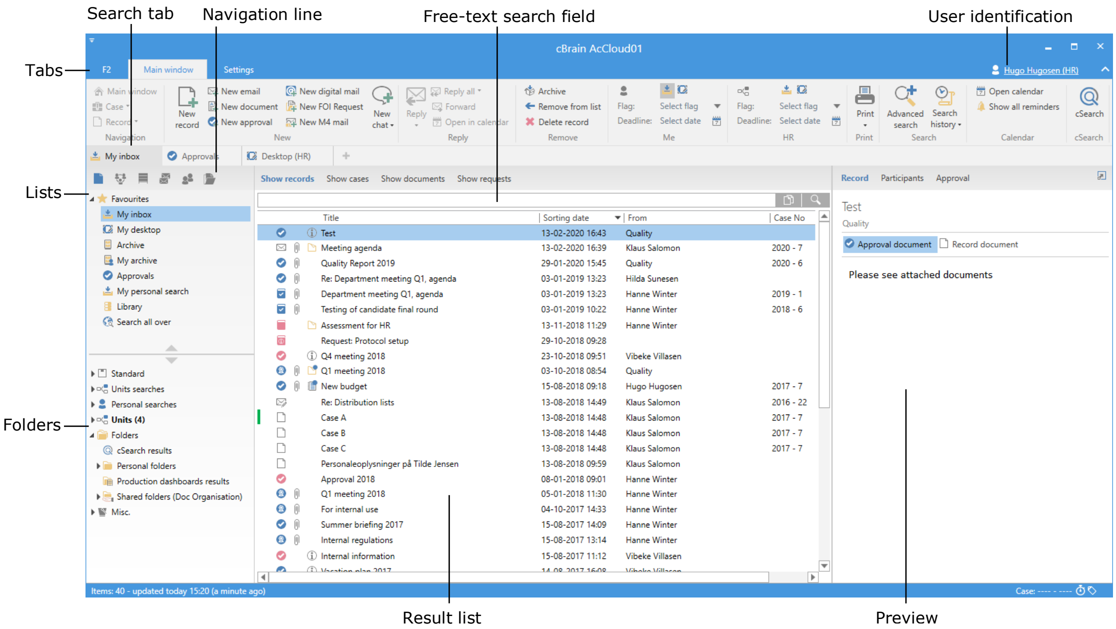

Figure 1: The main window structure

In the main window, users organise their work and receive incoming communication. From the “Archive”, it is possible to search for records and cases and create dynamic lists.

F2’s layout resembles that of ordinary email clients, and records and email records can be previewed from the main window to help create an overview. Additionally, the main window lets users access the “Archive” directly via the search function and the lists. The main window serves as the system start page on which users can access e.g. general settings as well as their inbox, desktop, and archive.

There are three standard tabs in the main window: “F2”, “Main window”, and “Settings”. Each tab has a ribbon consisting of several menu groups. From these the user has access to a number of menu items used for navigation, performing actions, and managing the window layout.

Farthest to the right is the user identification showing the user’s name and current unit among other things.

The search tabs of the main window are used to perform searches and having multiple searches open simultaneously. For further information, see the section *Search tabs*.

The main window also includes a free-text search field for general data searches in the "Archive" or one of its lists. It is possible to display additional search fields.

The left side of the main window displays several lists, e.g. "Favourites" under which the user can add frequently used lists or personal searches. The lists are used for displaying a particular subset of data from the "Archive".

The user can also create personal lists not visible to anyone else. These personal lists are displayed along with the default lists on the left side of the main window. By clicking on a relevant list, the user can navigate to a desired record, case or document.

Below the lists F2 displays its folders, which are utilised by the user for manual organisation of records into private and shared folders.

Next to the lists and folders, F2 displays what is known as the result list. The result list shows the content of a chosen search list, i.e. the records, cases, or documents. Read more about working with records, cases, and documents in the section *Working with records, cases and documents in the main window*.

With F2's preview enabled, the user can view a PDF version of any record or document in the result list. The preview can be displayed in a window next to or below the result list depending on the user's personal settings and setup.

Above the lists and folders of the main window is the navigation line from which it is possible to switch between displaying records, meetings, other inboxes and contacts (F2's participant register). The functions displayed depend on the number of F2 add-on modules included in the F2 installation.

Any information generated or received in F2 is stored in F2's central archive only. The lists are actually archive searches based on metadata and the user's search phrases.

Introduction to the content of the main window's tabs

The different tabs of the main window are described below.

The "F2" tab

Click the **F2** tab to open the F2 menu, which contains several functions pertaining to the general use of F2.

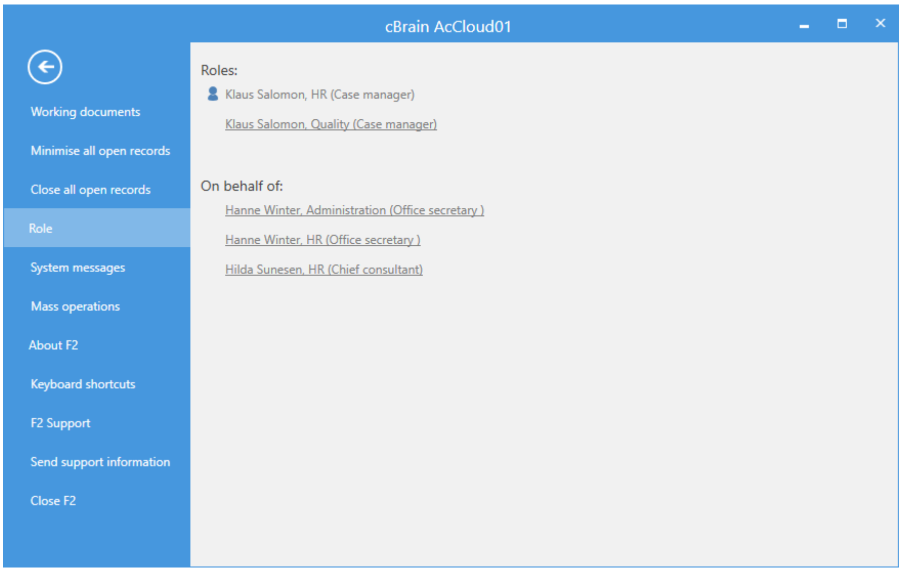

Figure 2: The F2 menu

The F2 menu contains the following items:

Menu item	Description
"Working documents"	Provides an overview of open documents in F2 with pending changes that are not yet saved to the database.
"Minimise all open records"	Minimises all open record windows.
"Close all open records"	Closes all open records. If an open record has unsaved changes, the dialogue "Save changes?" appears. After the user responds to this dialogue, the record will close.
"Role"	Users with several job roles in F2, including on-behalf-of rights, can switch between roles here.
"System messages"	Provides an overview of previous and current system messages in F2.
"Mass operations"	Shows the last 20 mass operations executed by the user.
"About F2"	Information about version number, etc. The F2 protocol association (normally an f2p:// link) is remade here. This is done to ensure that an F2 link opens in the correct F2 desktop client, e.g. after switching between F2 production, archive and/or test systems.
"Keyboard shortcuts"	Opens a window displaying shortcuts available in F2.

Menu item	Description
"F2 Support"	Directs the user to the home page specified in the installation as the support page of the organisation. This is typically an intranet page.
"Send support information"	From here the user can send information to F2 support directly.
"Close F2"	Shuts down F2.

The F2 menu is also available in the record and case windows. This provides access to relevant items.

The "Main window" tab

All functions relevant to communication, processing, and managing records can be found in the ribbon of the "Main window" tab.

Each menu item in the main window's menu ribbon is described in more detail in the manuals *F2 Desktop – Records and communication*, *F2 Desktop – Management and organisation*, and *F2 Desktop – Searches*.

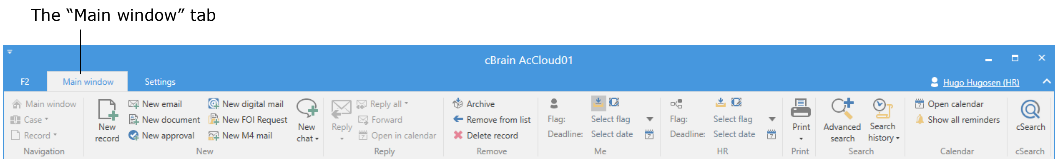

Figure 3: The ribbon of the "Main window" tab

The "Settings" tab

Using the functions of the "Settings" tab, users can adjust F2 to their individual preferences with regard to preview placement and to determine how F2 should handle a number of actions. For more on this, consult the manual *F2 Desktop – Settings and setup*.

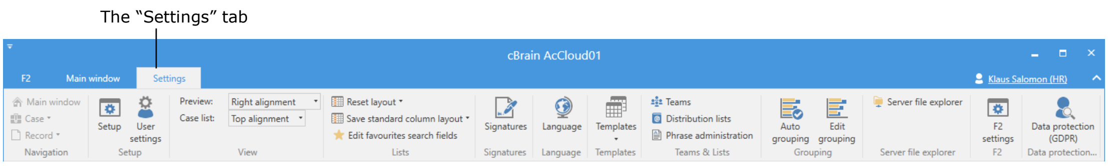

Figure 4: The ribbon of the "Settings" tab

User identification and fast role change

The user identification is found in the top right corner of F2's main window. The function "Fast role change" (add-on module) is also found here.

The identification shows which user is currently logged into F2 as well as the user's job role and unit. The screenshot to the right identifies the current user as Klaus Salomon from HR.

Click on the user identification to display a menu containing the functions "Change image" and "Change role" (requires the add-on module F2 Shared mailboxes).

Read more about changing images in *F2 Desktop – Settings and setup* or about "Change role" in *F2 Shared mailboxes – User manual*.

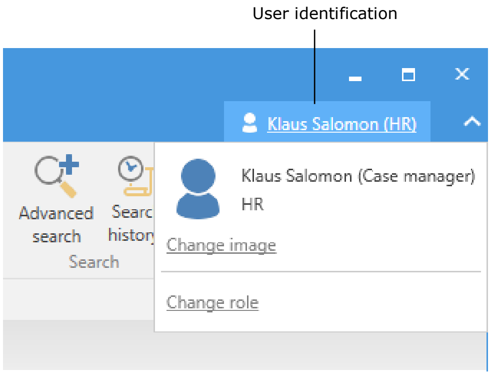

Figure 5: User identification

> **Note**: The corresponding user identification and "Change role" function can also be found in the record and case windows.

Search tabs

As described in the section *The main window's structure*, the main window contains search tabs that are used for performing several searches simultaneously. This is particularly useful when performing related searches.

New search tabs can be opened by clicking on + or by using the shortcut **Ctrl+T**.

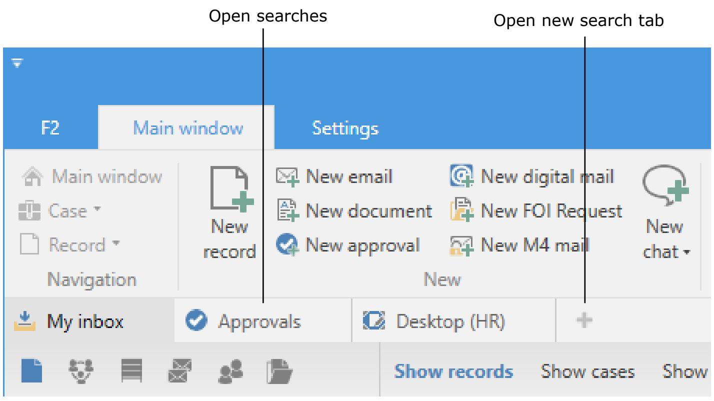

Figure 6: Search tabs in the main window

All search tabs will close when switching from one user to another. However, if the user switches roles the search tabs remain open.

Note: Each open search tab increases the memory usage of the F2 Desktop client. A warning can be configured to appear when the memory usage reaches a certain level. The configuration is performed in cooperation with cBrain.

Open list in a new tab

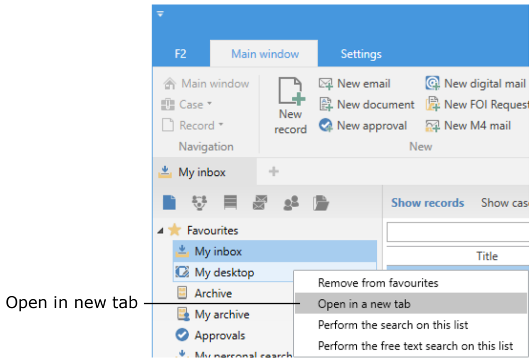

Figure 7: Open list in a new tab

The function "Open in new tab" can be selected by right-clicking on a list, a production dashboard, or internal parties. Click on **Open in new tab** to open the selected list in a new tab.

Lists and folders in F2

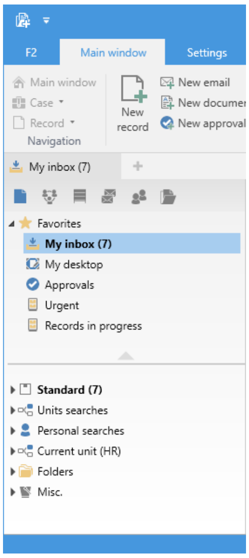

Figure 8: Groups of lists

F2's standard lists and the personal lists defined by each user are located on the left side of the main window.

As evident from the screenshot on the next page, the list view of the main window is divided into several areas.

Note: The division may vary from installation to installation.

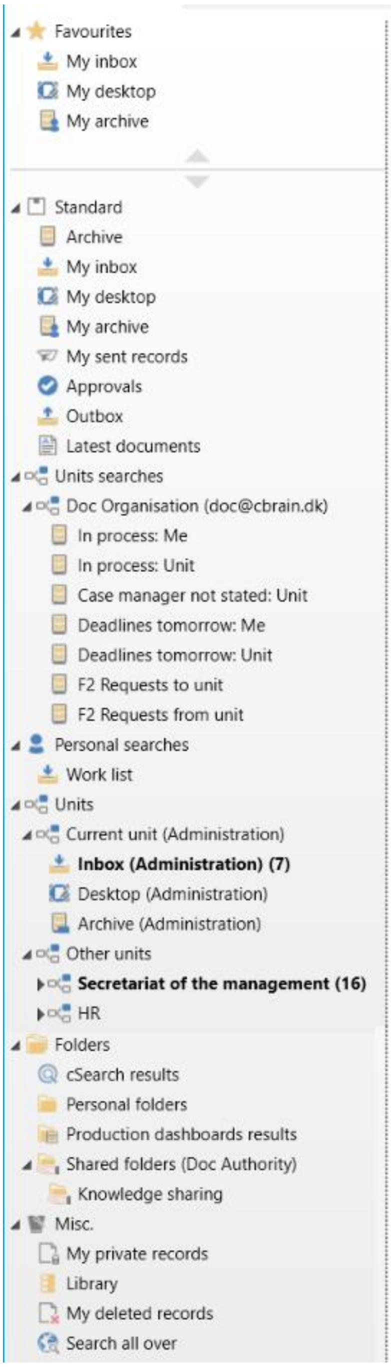

Figure 9: List view

"Favourites": In this area the user can add frequently used lists. These may be predefined lists or lists generated by the user. It is also possible to add cases.

"Standard": F2 comes pre-configured with several default lists. As a minimum, it will include the lists "My inbox", "My desktop", "My archive", "My sent records", "Outbox" and "Latest documents".

"Units searches": Contains lists of the organisation to which the user has access. The lists are adapted to each organisation and can be edited by an administrator.

"Personal searches": Here, F2 collects all lists generated by the user.

"Units": This shows the unit lists (i.e. the unit's inbox, desktop and archive) for all units in which a user has job roles. This means that a user with a job role in multiple units will see two nodes:

"Current unit": The user's current unit.

"Other units": All other units in which the user has job roles, but is not currently logged into, are collected in this node.

> **Note**: If a user only has a job role in a single unit, the "Other units" node is not displayed.

"Folders": Under "Folders" the user can find results from cSearch (add-on module), "Personal folders" as known from Outlook, "Production dashboards results" (add-on module), and "Shared folders", which are visible to everyone.

"Misc.": Here the user can find documents, their deleted records, a shared library, and the option to search in all of F2.

Predefined lists in F2

The F2 installation comes with a set of predefined lists located on the left side of the main window. These lists are configured during the setup of F2, which is why the user's search lists may vary from installation to installation. In addition to "Favourites", which is discussed above, the groups are divided into the following headings, shown in the figure below:

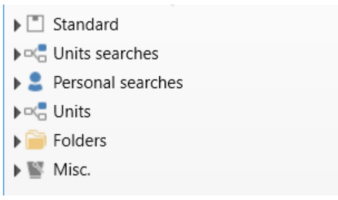

Figure 10: Predefined lists

Each of the main groups are described in detail on the following pages.

Standard lists

The "Standard" node is defined during the installation of F2. The lists generally included in "Standard" are specified here.

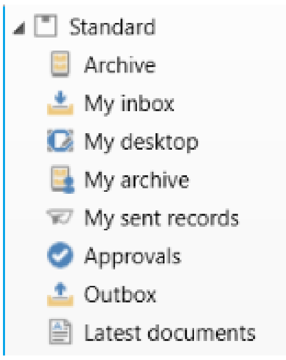

Figure 11: The "Standard" node

"Archive": Contains the total amount of data and information in F2.

"My inbox": Generally, contains everything a user receives from internal and external senders, such as records, emails, chats, notes, requests, approvals, responsibility-distributed records, etc. Users can move records from other lists to their inbox via personal management.

"My desktop": Contains all the various records created by the user. "My desktop" is to be considered as a physical desktop. Each user's daily work is performed from here. The users can add records from other lists to the desktop via personal management.

"My archive": Contains all types of records the user is or has been involved in. The list functions as a subset of the "Archive".

"My sent records": Contains all types of documents the user has sent, distributed, allocated responsibility for, chatted, etc. to other users or participants internally and externally.

"Approvals" (add-on module): Contains a list of all current approvals the user is involved in/is authorised to view.

"Outbox": Shows all active deliveries. When a delivery has been sent, it is automatically removed from the "Outbox" and appears in "My sent records" instead.

"Latest documents": Here, F2 collects the links to documents recently opened by the user.

Units searches

In this example, the “Units searches” node displays the “Doc Organisation”. The lists in this group vary from installation to installation.

“Units searches” contains a number of lists corresponding to the ones found in “Standard”, but pertaining to the unit instead of the individual. Here, each organisation defines a number of relevant lists that all users in F2 may access. Units searches are created by a user with the “Search administrator” privilege.

These lists support the unit’s daily work in F2 such as communication and task management.

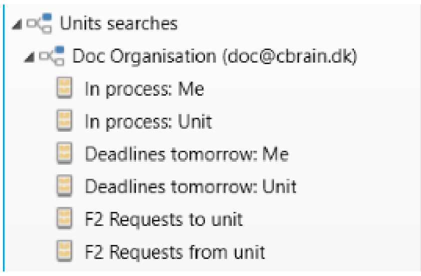

Figure 12: The “Unit searches” node

“In process: Me”: Provides an overview of the records for which the user is responsible and which have not yet been completed.

“In process: Unit”: Provides an overview of the records which have not yet been completed and for which the unit or users in the unit are responsible.

“Deadlines tomorrow: Me”: Provides an overview of the records for which the user is responsible and have the formal deadline “Tomorrow”.

“Deadlines tomorrow: Unit”: Provides an overview of the records for which the unit or a user in the unit is responsible and have the formal deadline “Tomorrow”.

“F2 Request to unit” (add-on module): This list contains all requests in process that have been sent to the unit or users in the unit.

“F2 Request from unit” (add-on module): This list contains all requests in process that have been sent from the unit or users in the unit.

Personal searches

The node “Personal searches” contains the search lists created by the user. In the figure below, one personal search, “Work list”, has been created.

Figure 13: The "Personal searches" node

The lists in the group "Personal searches" vary from user to user. All searches saved by a user are placed in this group. The user determines the name and the period of time a certain list is to be displayed here. Each list can be renamed or deleted by the user.

Units

For each unit in which the user has a job role, it is possible to view unit lists (i.e. the unit's inbox, desktop and archive). For more information, refer to the manual *F2 Shared mailboxes* (add-on module). This means that a user with job roles in several units will see two nodes:

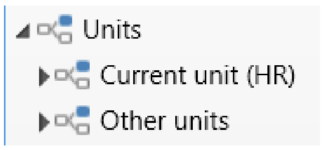

Figure 14: "Current unit" and "Other units"

"Current unit" shows the user's current unit.

"Other units" is a node that compiles all other units in which the user has job roles but is not currently logged into.

"Inbox", "Desktop", and "Archive" for each unit are displayed in the nodes as shown below. This lets the user see e.g. all incoming data in other unit mailboxes without having to switch roles.

> **Note**: If a user does not have job roles in several units, only the "Current unit" will be displayed.

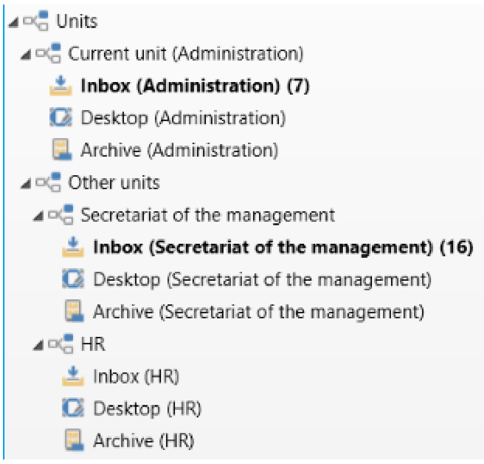

Figure 15: The "Units" node

"Inbox" (the unit's inbox): Contains incoming records, i.e. external emails, records sent internally, or new records for which the unit is responsible. In addition, the unit's users can place records in the inbox and desktop using unit management. The inbox can also serve as the unit's distribution centre for incoming records, allowing its users to divide work tasks between them.

"Desktop" (the unit's desktop): Provides an overview of the records created by the unit. The unit's users can choose to move records from their inbox or archive to the desktop via unit management.

"Archive" (the unit's archive): Contains all records which the unit and its users have handled via the unit's inbox and desktop. A user can move records between the standard unit lists and assign flags via the unit's menu group in the ribbon of the "Main window".

The nodes can be collapsed and expanded at the user's discretion. The number of unread records in the user's unit inboxes are added up depending on the node expansion level.

Below is an example of the node adjustment:

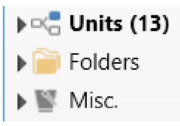

Figure 16: Nodes collapsed

If the "Units" node is collapsed, the total number of unread records for all unit lists is displayed.

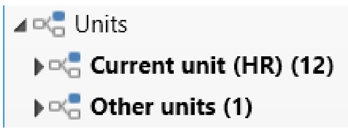

Figure 17: The unit nodes

To the left "Units" is expanded to show all unit nodes. The unread records of each unit node are added up to the collapsed view shown above.

Note: The maximum number of unread records shown for each inbox is 99. If there are more than 99 unread records in an inbox, "99+" will be displayed by default.

Decentral units

If the user has a job role in a decentral unit, its unit lists (i.e. the decentral unit's inbox, desktop and archive) will also be displayed in the top node "Units". Decentral unit lists are displayed like any other unit list in the main window, as shown below.

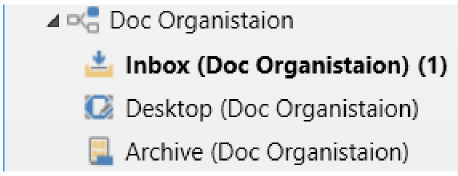

Figure 18: Decentral unit

Miscellaneous lists

This group contains the following lists:

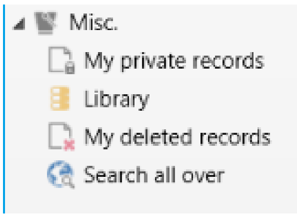

Figure 19: The "Misc." node

"My private records": A user's private list for personal emails and information.

External emails sent to the user's inbox can be moved to "My private records" ONLY if the user does not in any way add further metadata to these records. If any metadata is added or updated either automatically or manually, the record cannot be moved to this list.

If a user wishes to send a private email, it is recommended to do so from this list.

"Library": This is an archive used for knowledge sharing in the organisation. All users can create records here, but it is not possible to create subfolders. This folder can be accessed by all users.

"My deleted records": The user's personal recycle bin for deleted records. In co-operation with the organisation, cBrain will configure the period of time a deleted record stays in the bin. If a record is deleted by mistake, it can be restored using the function "Restore record".

"Search all over": All records placed in the "Archive", "My private records", "Library", and "My deleted records" are made available for a search.

However, the search is limited to the user's private folders and lists as well as the authority to which the user belongs.

Folders in list view

This group includes fixed searches, folders for any add-on modules, and folders managed by the user. This lets the user organise records into relevant contexts. The folders are displayed in F2's list view on the left side of the main window.

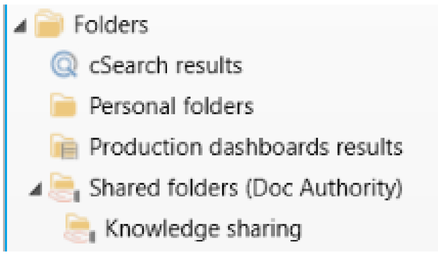

Figure 20: The "Folders" node

"cSearch": The "cSearch results" folder contains results from searches performed using the search tool cSearch (add-on module). For further information, see *F2 cSearch – User manual*.

"Personal folders": In this folder, the user can create a number of folders and subfolders that are visible only to the user. It is also possible to add cases. Further information about the use of folders and cases can be found in the next section.

"Production dashboards results": This folder shows records from a management cabinet, which is an add-on module for F2.

"Shared folders": This folder is shared with all users under the same authority. Users can create, move and remove folders, and add cases. Only empty folders can be moved or removed.

Below is a description of how to manage personal and shared folders. The procedure for both types of folders is identical.

Create new folder

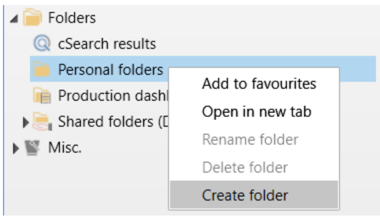

Figure 21: Create folder

Right-click on the folder in which the new folder is to be created.

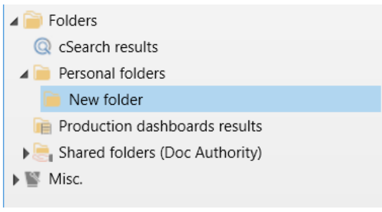

Figure 22: New folder

Click on **Create folder**. Specify the name of the new folder.

Note: It is possible to create a folder structure with several levels. The procedure is the same as when creating a new folder. Right-click on the desired folder to create a subfolder.

Rename folder

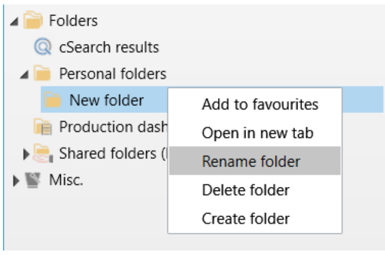

Figure 23: Rename folder

To change the name of a folder, right-click on the folder and select **Rename folder.** Then enter a new name.

Delete folder

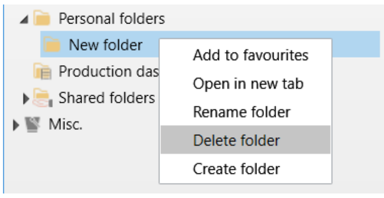

Figure 24: Delete folder

To delete a folder, right-click on a folder and select **Delete folder.**

If the folder does NOT contain any shortcuts to records, the message below will be displayed.

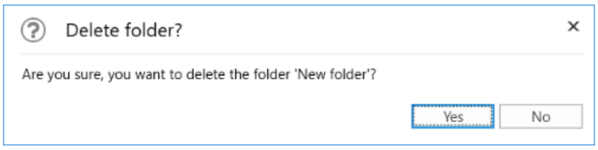

Figure 25: Confirm folder deletion

A folder containing shortcuts to records <u>cannot</u> be deleted. If the user tries to delete the folder, the message below will be displayed.

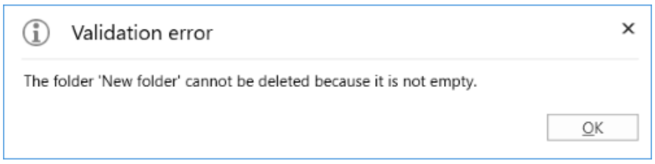

Figure 26: The folder cannot be deleted

Note: A shared folder may contain records that are invisible to the user due to their access restriction. This means that a folder may appear empty without actually being empty.

Add to favourites

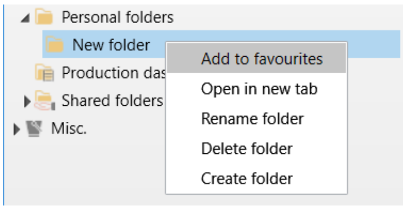

Figure 27: Add to favourites

A folder can be added to the "Favourites" list, which is each user's personal list view of frequently used folders and lists.

To add a folder to "Favourites", right-click on the desired folder and select **Add to favourites**. The folder is then added to the "Favourites" list.

Move folder

To move a folder, click on it and drag it with the mouse to a new location. Moving a folder retains any shortcuts to the folder's records.

Note: Records can also be moved to the top nodes "Personal folders" and "Shared folders".

Create a shortcut to a record in a folder

To link records to folders, simply drag and drop them from the main window's result list to the desired folder.

A record can be linked to an unlimited number of folders. F2 will create a shortcut in each folder to which the record is dragged and dropped.

The following dialogue appears when the user drags a record to a folder.

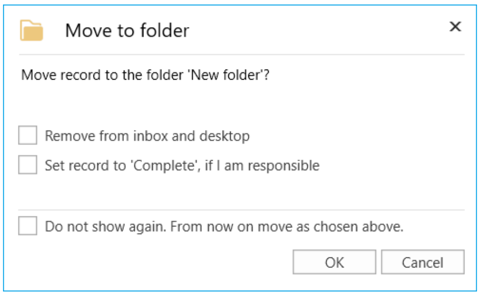

Figure 28: Move record to a folder

When a shortcut is created in the chosen folder, the user must also decide if the record should be set to completed and moved to the "Archive".

The "Move to folder" action can be cancelled by clicking **Cancel**.

Remove record from folder

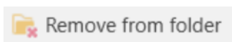

Figure 29: The "Remove from folder" menu item

The menu item "Remove from folder" appears in the "Main window" tab when a folder is selected in the lists. The "Remove from folder" function allows users to remove selected records from the folder.

The shortcut **Ctrl+E** can also be used to remove records from folders.

The user has to confirm the action before the record is removed from the folder.

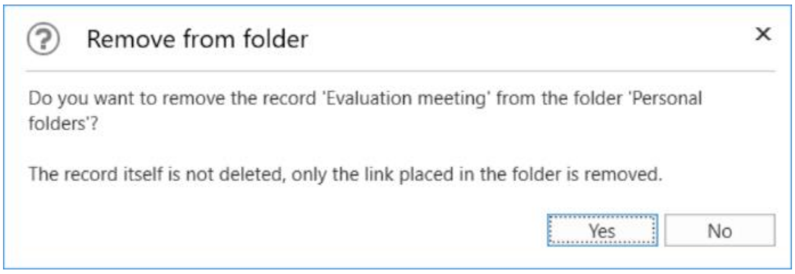

Figure 30: Remove record from folder

Add cases as folders in the main window's folder structure

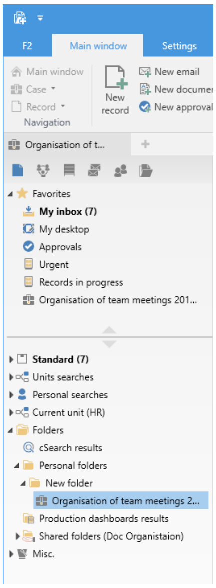

Figure 31: A case added to the folder view

Cases can be added to personal and shared folders in the main window's list view.

A case is added to a folder by simply dragging it from the result list to the desired folder in the list view. When the case is dropped onto the folder, it appears with a case icon, title and case number in the folder as shown to the right.

Any subfolders on a case can be expanded and collapsed in the folder structure, but note that case subfolders cannot be created, deleted or renamed here.

The case is automatically updated when records are added to or removed from the case.

Scrollbars in Favourites and standard lists in the main window

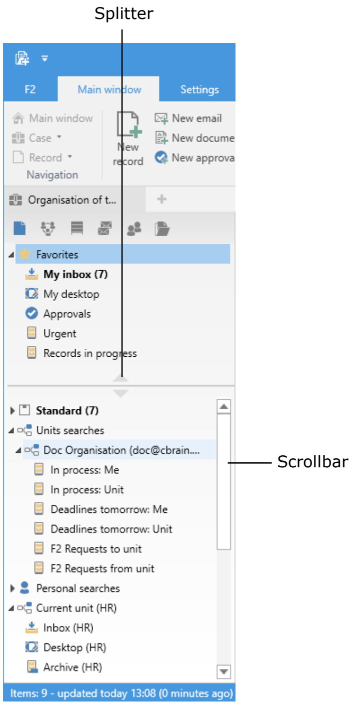

Figure 32: Splitter and scrollbar

The “Favourites” and “Standard” lists in the main window both have scrollbars.

The sizes of the favourites and standard lists are interrelated and can be adjusted using a splitter according to the user's viewing preference.

To fully expand either list view, click on the arrow above or below the splitter.

The main window’s navigation line

Above the lists and folders of the main window is the navigation line. By using its icons, the user can switch between different views in F2.

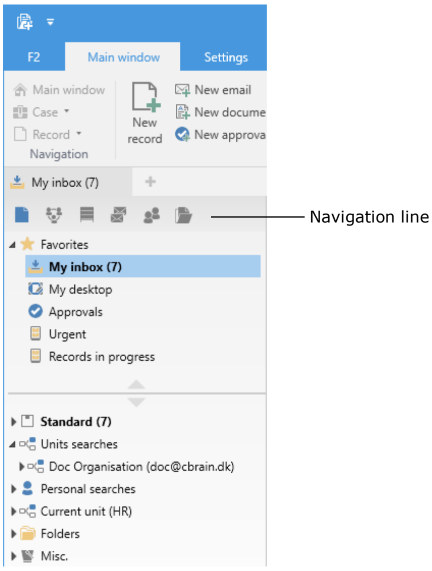

Figure 33: Navigation line

Records: Shows lists and folders.

Meetings (add-on module): Shows meetings to which the user has access.

Production dashboards (add-on module): Shows production dashboards to which the user has access.

Inboxes: Shows unread records in the inboxes of users for whom the user has on-behalf-of rights.

Contacts: Shows the participant register.

Freedom of information requests (add-on module): Shows active and completed FOI requests.

Note: The navigation line icons may vary depending on add-on modules and F2’s configuration.

Working with records, cases and documents in the main window

In F2 it is possible to perform a number of tasks directly from the main window. The next sections describe the functions that can be accessed via the right-click menus and preview of the main window.

Right-click functions for records

Right-click any record in the main window's result list to access the following functions:

Icon	Function	Purpose
	Open record	Opens the record window of the record which the user has selected in the result list.
	Open case	Opens the case window for the case to which is the selected record is attached.
	New	Creates a new: • Record • Email • Document • Approval • FOI request • New chat • New chat to all
	Reply	This function is active when an incoming email or record that has been sent internally in F2 is selected in the result list. To reply to the sender, click on: • Reply • Reply and include attachments – i.e. answer the sender and keep received attachments in the email when replying.
	Forward	This function is active when an incoming email or record that has been sent internally in F2 is selected in the result list. The function opens a new record that is attached to the email to be forwarded.

Icon	Function	Purpose
	Mark as read/unread	Any record can be marked as either read or unread. Records that are read are displayed in a normal font, while unread records are displayed in a bold font. **Note**: Read-markings in a unit list apply to all the unit's users. This means that when a user marks a record as read/unread, the record becomes read/unread for all the users in the same unit. A record can be marked as read in one of the following ways: • Open a record in F2 (or a calendar invitation in Outlook). • Display a record in the preview for X seconds (duration depends on a user's personal setup). • Right-click on a record and mark it as read/unread using the right-click menu. When a record is marked as either read or unread in the unit list, it is logged in the record's history. This can be accessed by clicking on **History** in the "Advanced**"** tab in the record window.
	Personal control	When a user opens a record to either read it or to become involved in it, F2 creates a personal control line on it, which is only visible for this user. This line provides the user with options to assist him/her in working on the record. The user can choose to include the record in the personal lists: • Show in "My inbox". • Show in "My desktop".
	Flag (me) (Personal flag)	As part of the personal control line a user can also set a personal flag on the chosen record. The flag can help the user manage his/her work on the record. The personal flag can only be seen by the user him/herself.
	Flag (unit) (The unit's flag)	Records that automatically appear in the unit's inbox have a control line for the unit. This lets the users in the unit set a unit flag to help manage the unit's work.

Icon	Function	Purpose
		The unit flag can only be seen by users in the unit. **Note**: The unit flag corresponds to the current unit with which the user is into F2.
✖	Delete record	Deletes the selected record if the user has the permission to do so. A deleted record is moved to "My deleted records". In cooperation with the organisation, cBrain configures how long a deleted record will stay in "My deleted records". An unshared record can be deleted from F2. A record that is or has been shared can only be deleted from F2 by users who have the "Can delete shared records for everyone" privilege. This means that users who do not have the privilege, cannot delete e.g. an internal email record or a record containing a chat even if the chat has been deleted. For further information, see the *F2 Desktop – Records and communication* manual.
	Move to private	Moves the selected records from the result list to the "My private records" list.
	Move to library	Moves the selected records from the result list to the library.
	Access control	This function is used to change the access level on the chosen record. F2 operates with three access levels: 1) **Involved** – the content of the record can only be seen by users who are involved in the record e.g. via participation in a chat. 2) **Unit** – the content of the record can be seen and edited by involved users plus all users in the same unit as user(s) responsible for the record. 3) **All** – the content of the record can be seen by everyone in the organisation.
	Show access information	Shows which users have: • Read access. • Write access to documents. • Full write access.

Icon	Function	Purpose
	Add record to case	Adds the record(s) selected in the result list to the case without opening the record/records. The function can also be used to copy a record to several cases with one action. **Note**: If more than one record is selected in the main window, it is only possible to move them to one case. The records cannot be copied to multiple cases.
	Remove record from case	Removes the record(s) from a case without opening said record(s).
	Select as answer record to a request	Designates a record as a reply to an existing request.
	Register/ Deregister record	Registers/deregisters the selected record. If the record is attached to a case, it is given a record number on the case upon registration. If the record is not attached to a case, the record is registered and will be given a record number if it is later attached to a case. **Note**: A registered record can be completed at any time. It does not need to be attached to a case.
	External access	Shares the selected record with external participants. Depending on F2's configuration, the user can choose between: • Open • Partly open • Closed.
	Set record to 'Complete'	Sets one or more records from the result list as complete. This menu item is active regardless of the record's status. This function is related to: • The status of the record (in progress/completed) • The status on the unit's case line for records sent internally to the unit.
	Reopen record	Reopens one or more records in the result list.

Icon	Function	Purpose
	Add supplementary case manager	Adds one or more supplementary case managers to the record.
	Change responsible	Changes the responsible user/unit on the record.
	Reminder	• **Add reminder** A user can create a reminder for him/herself on a record. Reminders automatically pop up at a chosen time. • **Edit reminder** Edit the reminder. • **Remove reminder** The reminder is removed.
	Show notification	This function shows any notifications on a record such as when a user has been added as a supplementary case manager, or if an approval flow requires the approval of a user.
	Reports	A report is created by selecting records in the result list. This function lets the user do the following: • **Create FOI request** The Freedom of Information request report can be adjusted by deselecting records and documents before the final version is created. It is possible to comment on each individual document that has been selected. • **Create report** • **Export to Excel**
	Copy link to this record	Copies the record ID which can then be inserted into other records.
	Remove from Outbox	Removes failed deliveries from the outbox. The delivery will still be located in the "Archive". **Note**: The menu item is only available in the "Outbox" list.

Icon	Function	Purpose
	Export search result to Excel	Exports a search result to Excel where it can then be processed. This function can be used in connection with FOI requests.
	Related	The **All participants on these records** function is used to search for the participants involved in one or more of the records selected in the result list. Click on **Reread related searches** to update the search options made in connection with the add-on module F2 Related searches.

Case help for right-click functions

It is possible to turn on case help for right-click functions for records in the main window. This is configured in cooperation with cBrain. Per default, the case help for right-click functions is turned off.

The "Case help" dialogue is displayed when the following right-click functions are performed on a record in the main window:

- Access control
- Add record to case
- Remove record from case
- Register record
- Deregister record
- External access
- Set record to 'Complete'
- Reopen record
- Add supplementary case manager
- Change responsible.

For further information on case help, see *F2 Desktop – Records and communication.*

Mass operation warning

If the user performs a right-click action in the main window with several records selected, a dialogue will appear if he/she has not responded to the case help for one or more of them.

This dialogue displays all records and whether they failed. The "Status" column provides either the reason an operation has failed, or an "OK" for actions that succeeded.

Manage failed operations by selecting one or more records in the dialogue. Then, select one of the available actions:

- **Repeat all which can be repeated**: Opens a new dialogue. See *Repeat the case help for multiple records* for more details.
- **Repeat**: Respond to the case help for the highlighted record(s). The status then changes to “OK” in the dialogue.
- **Open**: Open the highlighted record(s).
- **OK**: The original action is performed for the record(s). The case help is performed for the records to which the user has responded. Any records for which the user has not responded to the case help will only be subjected to the original action.

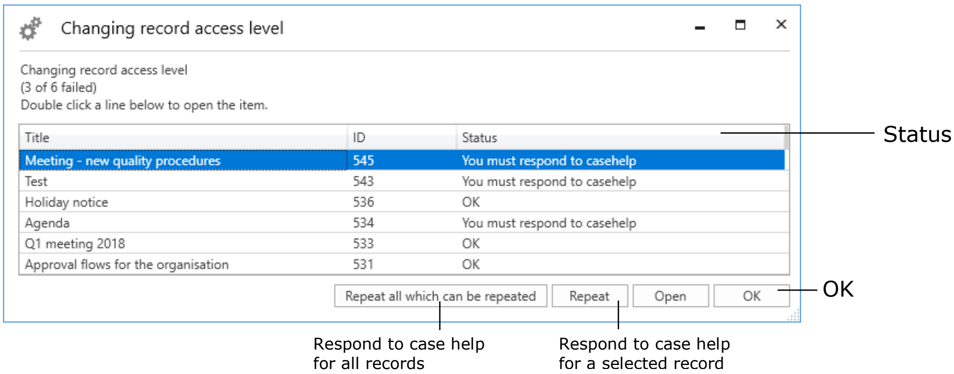

Figure 34: Dialogue shown when a case help response is needed

The “Status” for each record will change to OK after the case help has been carried out. When the user clicks on OK in the dialogue, the initial action is performed on all the records.

This warning appears even if the setting “Show warning when mass operations fail” has been disabled by the user.

Repeat the case help for multiple records

If the action “Repeat all which can be repeated” was selected in the first case help dialogue, described above in *Mass operation warning*, a new dialogue opens with suggested changes. In this dialogue, it is possible to select that F2 automatically applies the changes to all subsequent records. Tick the box **Apply to all subsequent records with this suggestion** at the bottom of the dialogue to automatically repeat and respond to the case help.

In the example below, the user selected **Repeat all which can be repeated** in the first case help dialogue. The case help then suggests a change in the “Suggested changes when saving a record” dialogue in the example: “Attach case?” Tick the box **Apply to all subsequent records with this suggestion** and click **OK** to automatically resolve the case help for all failed records listed in the first dialogue.

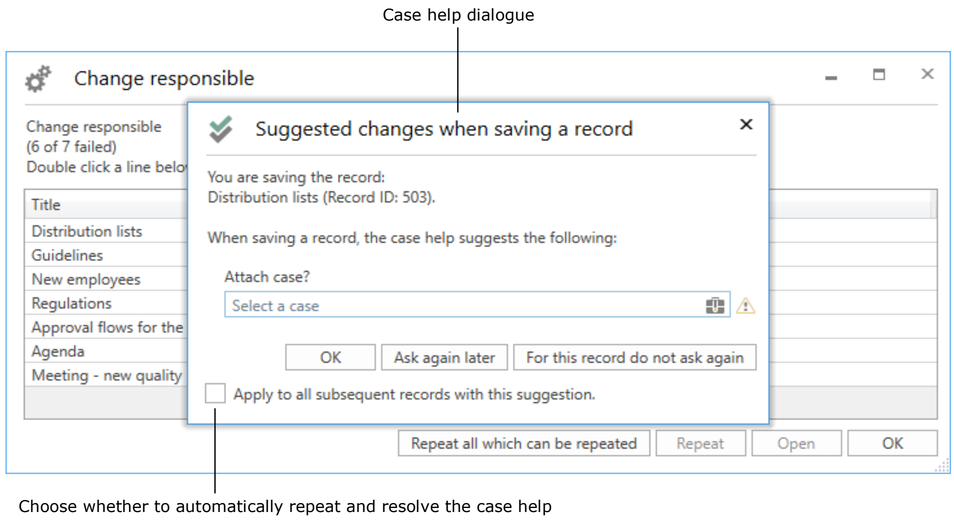

Figure 35: Case help for multiple records

Note: Only identical suggestions are applied when clicking **OK**. Any case help with other suggestions, such as changing access to the user's unit or registering the record, will not automatically be resolved. In the same vein, clicking **Ask again later** or **For this record do not ask again** in the dialogue will only be applied to identical suggestions.

Note: It is possible to hide the check box **Apply to all subsequent records with this suggestion** through a configuration. Configurations are made in cooperation with cBrain.

Right-click functions for cases

Right-click any case in the main window's result list to access the following functions:

Icon	Function	Purpose
	Open case	Opens the case window for the selected case.
	New	Creates a new: • Record • Email • Document • Approval
	Set case to 'Complete'	Changes the case status from "In progress" to "Completed".
	Reopen case	Changes the case status from "Completed" to "In progress".

Icon	Function	Purpose
	Change responsible	Changes the responsible user/unit on the case.
	Add supplementary case manager	Adds one or more supplementary case managers.
	Add participants	Adds one or more participants to the case.
	Add access restriction	This function allows the user to add security groups, units, teams or users to the access restriction on the chosen case.
	Add keyword	Adds one or more keywords to the case.
	Set new deadline	Sets a new deadline for the chosen case. If a new deadline is not chosen, the current deadline will be removed from the case.
	Change journal plan	Sets a new file-plan for the selected case. This function is connected to the add-on module F2 Task guides.
	Set progress code	Sets a new progress code for the selected case. This function is connected to the add-on module F2 Progress codes. For more information, see *F2 Progress codes – User manual*.
	Set external access	Shares the selected record with external participants. Depending on the configuration the user can choose: • Open • Partly open • Closed.
	Copy link to this case	Copies a hyperlink to the case that can be pasted into records or cases.
	Export search result to Excel	Exports a given search result to Excel, where it can then be processed. This function can for example be used in connection with FOI requests.
	Related	The function **All participants on these cases** is used to search for the participants that are involved in one or more of the cases selected in the result list. Click on **Reread related searches** to update the search options that have been made in

Icon	Function	Purpose
		connection with the add-on module F2 Related searches.

Right-click functions for documents

Right-click any document in the main window's result list to access the following functions:

Icon	Function	Purpose
	Show PDF's	Opens the selected document as a PDF file.
	Open	Opens the selected document in the format chosen during setup. The icon changes depending on the file format, e.g. PDF or Word .
	Export file…	Saves the document to the user's computer.
	Open record	Opens the record to which the document is attached.
	Open case	Opens the case to which the document is attached.
	Properties	Opens the "Properties" dialogue that shows the document's properties. For further information, see *F2 Desktop – Settings and setup*.
	Copy link to document	Copies a hyperlink to the record to which the document is attached. This hyperlink can be pasted into other records, case metadata or notes, chats, annotations, etc. For further information on inserting hyperlinks, see *F2 Desktop – Records and communication.*
	Export search result to Excel	Exports a search result to Excel, where it can then be processed. This function can be used in connection with FOI requests.

Mass operations in the main window

It is possible to perform various mass operations in the main window. This is done by selecting several records, cases or documents at the same time. With the items selected, simply right-click and choose one of the possible actions from the menu. These actions are described below.

When a mass operation is performed using the right-click menu in either the main or case window, a status bar appears in the bottom right corner. In the example below F2 is changing the responsible user on 1 of 14 records.

Figure 36: The status bar for the mass operation "Change responsible"

Note: If a mass operation cannot be performed on one or more of the selected records/cases, a notification will appear. A notification is always shown when the actions "Reports", "Merge to case participants" and "Close related records" have been completed.

The main window preview

With the main window preview visible, it is possible to see the content of records and documents that are selected in the result list. The preview can be hidden or displayed either next to or below the result list. The user can determine the preview's alignment in the main window's "Settings" tab.

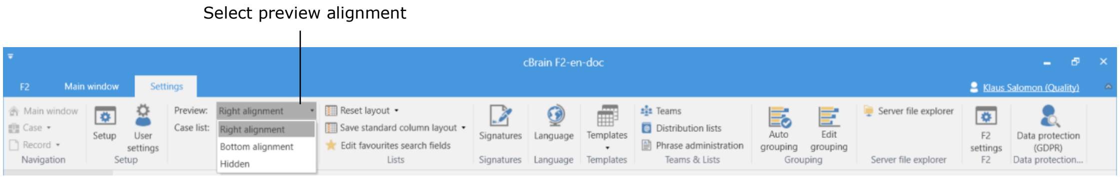

Figure 37: Choose where to display the preview in the main window

For further information on the preview, see *F2 Desktop – Settings and setup.*

The preview contains a number of functions to facilitate work with records and documents.

The user can view and open chats, notes and annotations on records. It is also possible to navigate between the record, its participants, any approvals (add-on module) and requests (add-on module). See the figure below.

Approvals can be processed from the preview window directly. For further information, see *F2 Approvals – User manual*.

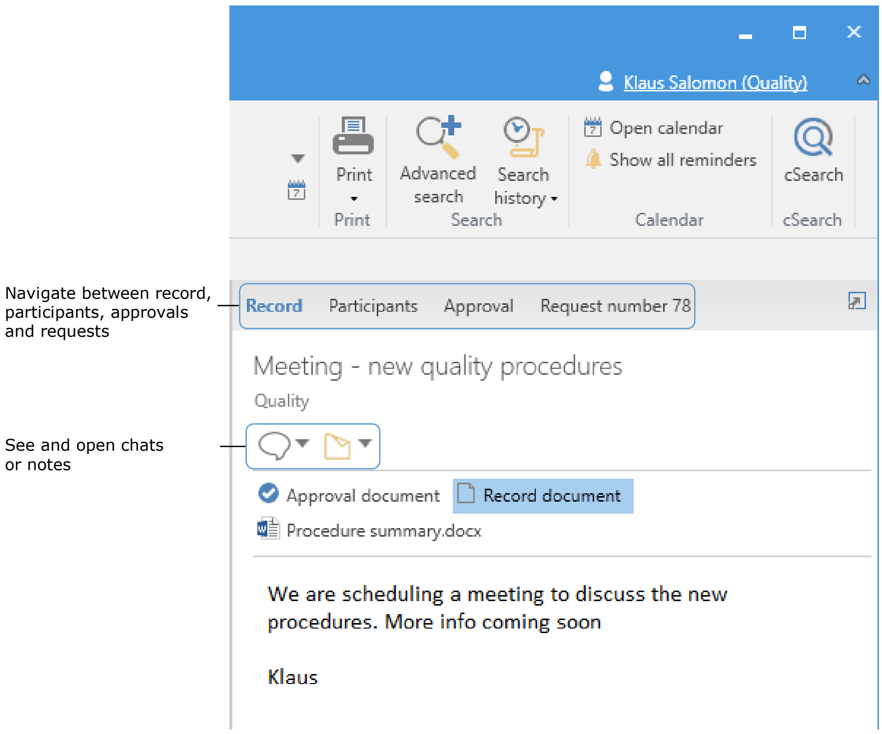

Figure 38: Preview functions

The following section provides an overview of the main window's additional preview functions.

Right-click functions for documents in the preview

Right-clicking a document in the preview lets the user perform any of the functions below.

Icon	Function	Purpose
	Show PDF	Opens the selected document as a PDF file.
	Open	Opens the selected document in the format chosen during setup. The icon changes depending on the file format, e.g. PDF or Word .
	Export file…	Saves the document to the user's computer.
	Properties	Opens the "Properties" dialogue that shows the document's properties. For further information, see *F2 Desktop – Settings and setup*.
	Copy link to document	Copies a hyperlink to the record to which the document is attached. This hyperlink can be pasted into other records, case metadata or notes, chats, annotations, etc. For further information on inserting hyperlinks, see *F2 Desktop – Records and communication*.

Show properties for participants in the preview

It is possible to go directly to properties for participants and distribution lists from the main window's preview. Right-click on a participant or list and then click on "Show properties".

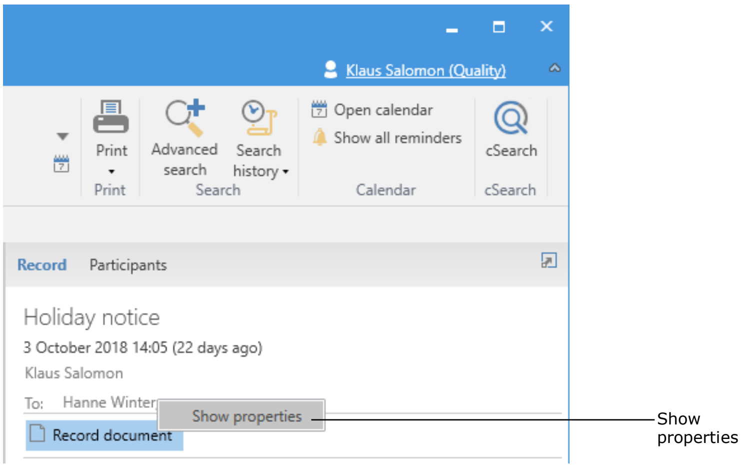

Figure 39: Right-clicking on a participant in the preview

Show distribution list content in the preview

It is possible to view the current content of a distribution list directly from the main window's preview. Right-click on a distribution list in the "Recipient" field in the preview and then click on "Show content".

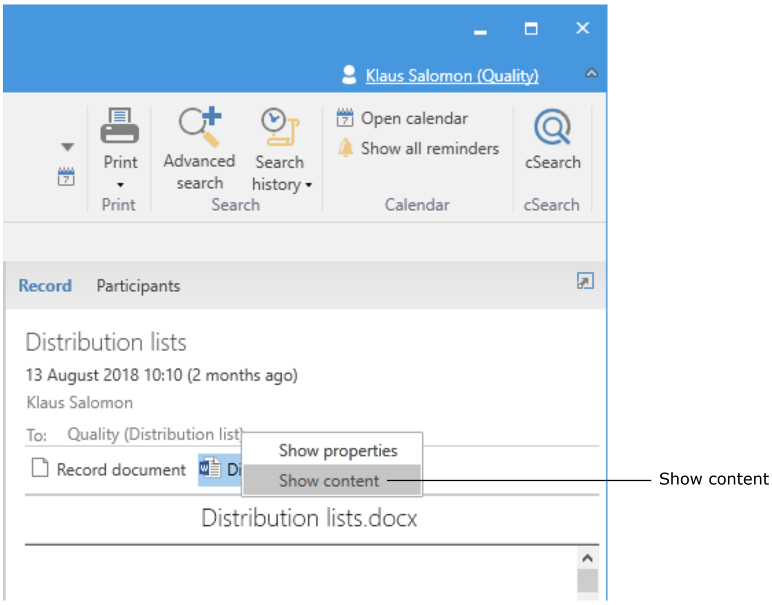

Figure 40: Right-clicking on a distribution list in the preview

A dialogue will show the content of the distribution list. See the figure below.

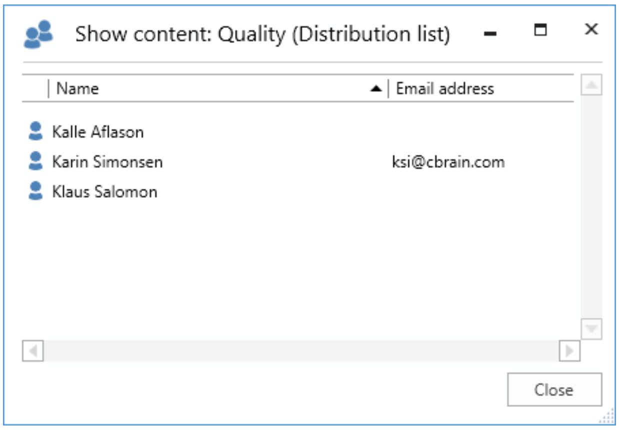

Figure 41: The "Show content" dialogue

The dialogue will show the content of the distribution list as it was when opened by the user. The actual content of the list may have changed from the time when it was added to the record.

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

Print document

It is possible to print records and documents from the main window directly by clicking on the menu item **Print**.

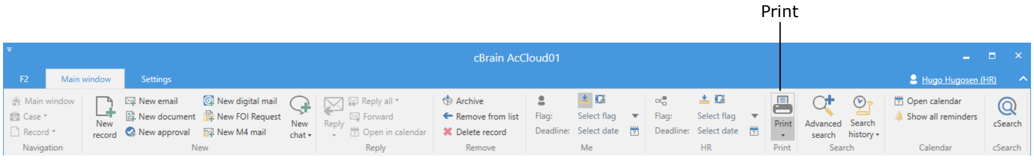

Figure 42: "Print" function in the main window ribbon

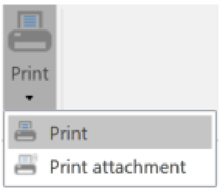

Figure 43: Drop-down menu for "Print"

Select a record and click on the **drop-down arrow** on the **Print** menu item to open a menu with the options **Print** (record document) and **Print attachment**. These functions are described in the section below.

Print the record document

Select a record in the result lists and click on **Print**. F2 then generates a PDF-file of the record document and opens a print dialogue.

The generated PDF file <u>only</u> contains the record document.

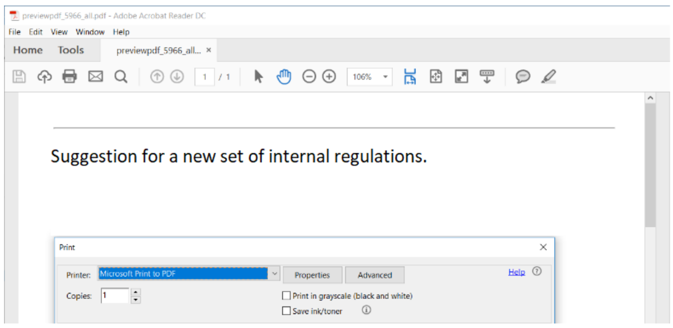

Figure 44: Print record document

Print attachments using the preview

It is possible to print attachments from the main window preview.

Click on a record in the result list to see its preview. Then click on the attachment to print and then on the **Print** menu item in the main window ribbon.

In the drop-down menu that appears, click on **Print attachment** and the selected attachment will be ready for printing.

Note: An attachment cannot be printed if the main window preview is hidden.

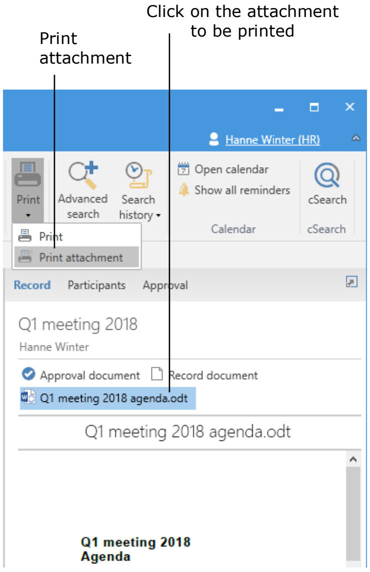

Figure 45: Print attachment from the preview in the main window

List of figures