F2

Request

Version 7

Table of contents

Reading guide

This manual is written for users of F2 Request.

The manual contains a short introduction to F2 Request and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

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

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

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

We hope you enjoy using F2.

Introduction to F2 Request

A request is a method to formally ask a user or a unit to carry out a task.

A request is created in the record window and then attached to the open record. When a request has been created, it can be sent to a user or a unit as a formal way of allocating a task. A request sent to a user or unit within a single F2 authority is called a regular request.

Three types of requests can be made in F2:

- **Regular requests**

  A regular request is a formalised way of requesting that a job be done within an authority.

- **Group requests (add-on module)**

  A group request is sent within one F2 installation, but between different authorities.

- **External requests (add-on module)**

  An external request is sent between F2 systems, i.e. across installations.

This manual focuses on regular requests.

For more information about group and external requests, see *F2 Group request – User manual* and *F2 External request – User manual*.

A regular request is always sent to participants or units within one F2 authority.

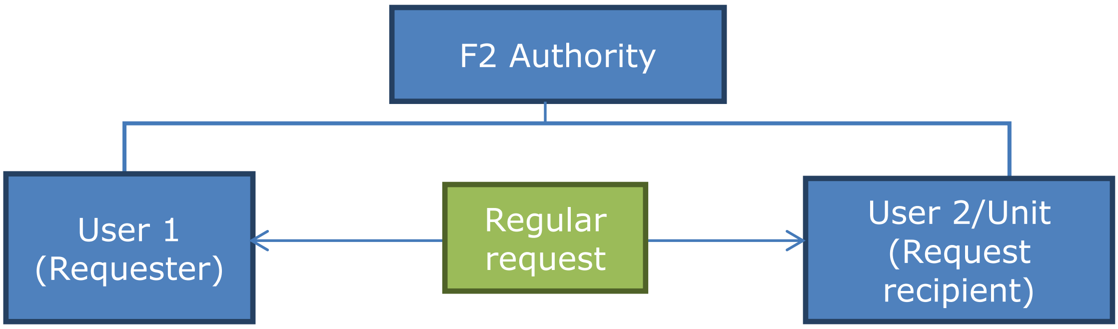

Figure 1: Regular request from a user to a user/unit within one F2 authority

Regular requests

This section describes how a request is created, sent, received, executed, and finalised.

Creating a request

Create a new request by clicking **New request** in the ribbon of the record to which the request should be linked. Several requests may be created on the same record.

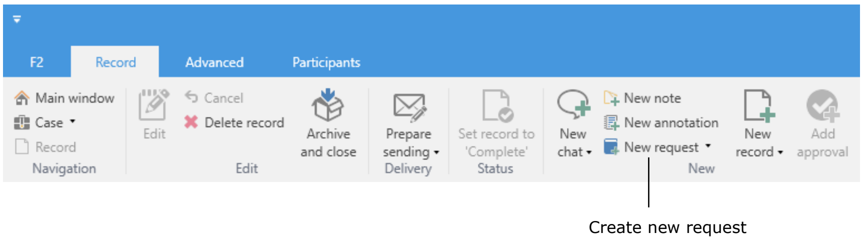

Figure 2: Creating a new request

> **Note**: Requests can only be created on records with the "In progress" status. The "New request" menu item is deactivated for completed records.

Click **New request** to open the "New request" dialogue. The "Return to" field is already filled in with the request creator's name.

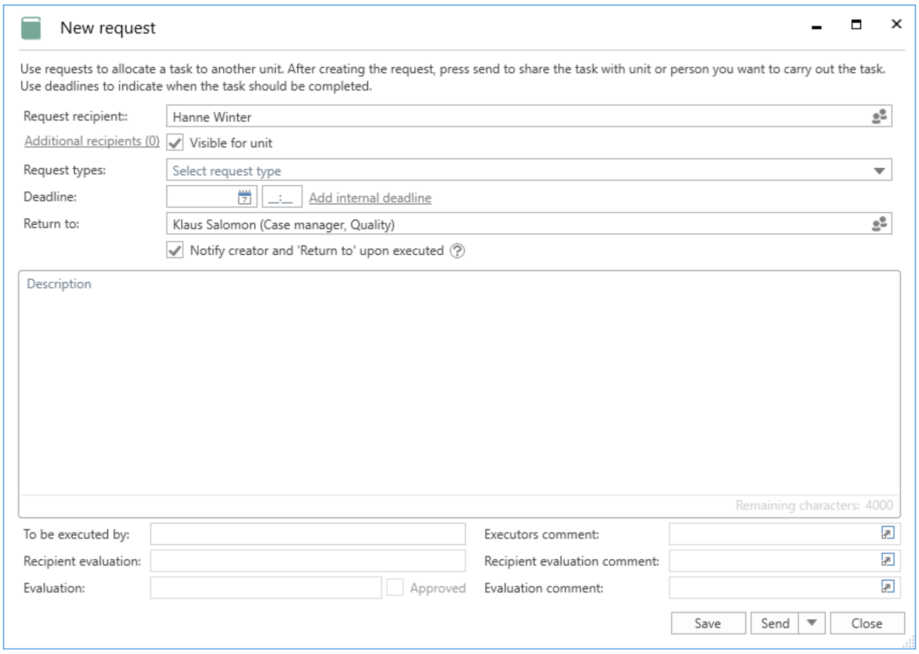

Figure 3: The request window

> **Note**: The "Visible for unit" tick box next to "Additional recipients (0)" appears if a user is added to the "Request recipient" field.

Before sending the request, the requester can fill in the following fields.

Field	Purpose
"Request recipient"	The user or unit who will receive the request.
"Additional recipients"	Add more users here if the request is meant for multiple users. F2 will then create a separate copy of the request on the record for each recipient. There is no practical or hierarchical difference between the recipient added in "Request recipient" and those added in "Additional recipients".
"Visible for unit"	Tick this box to make the request visible to users in the request recipient's unit.
"Request types"	Click the drop-down arrow to display a list of request types. The options depend on the setup of F2. More than one option may be selected.
"Deadline"	The date (and, optionally, time) indicating when the request is to be executed. The deadline affects how and where the request appears in the lists of requester and recipient, allowing users in the organisation to sort requests by deadlines. Enter the date and, if needed, time in the field or click on the calendar icon. When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the approval and the approval record if there is no internal deadline.
"Add internal deadline"	The requester, recipient or executor may add an internal deadline to a request. The internal deadline is primarily used by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed. The request icon changes colour depending on the internal deadline, which is suggested as the deadline for the answer record. The internal deadline is added in the same way as the formal deadline. The internal deadline takes precedence over the formal deadline, except in the request history log whose deadline always adheres to the formal deadline. When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the approval and the approval record if there is no internal deadline.

Field	Purpose
"Return to"	Shows to whom the request is sent when executed. Upon creation of the request, the requester is automatically specified in this field. If the requester does not want to receive the request reply, he/she can specify another user here before sending the request.
"Notify creator and 'Return to' upon executed"	If this box is ticked, the request will appear in the inboxes of the requester and the user specified in the "Return to" field when it has been executed. **Note**: An organisation may choose that F2 automatically ticks this box upon request creation. This must be configured by cBrain.
"Standard description"	Choose between text templates with predefined texts. The chosen template text is inserted in the description field. **Note**: If no standard description template has been created, this field is not visible. Templates are created by cBrain.
"Description"	Text informing the recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.

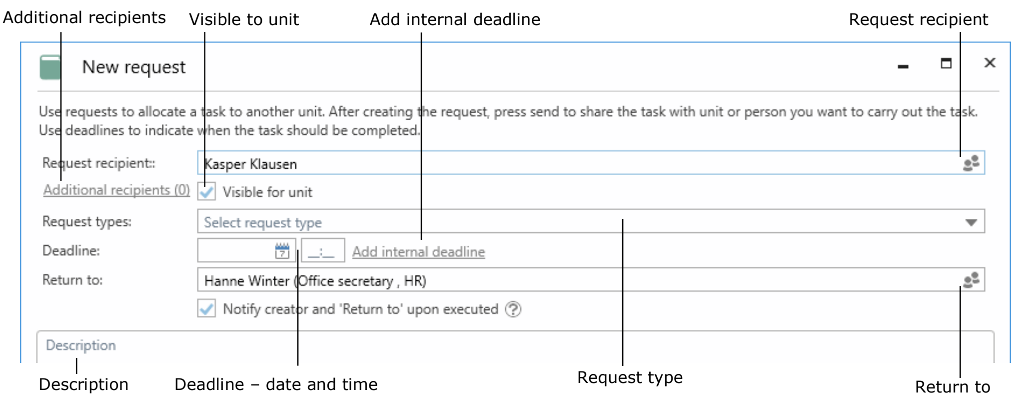

Figure 4: Fields the requester may use

Click **Save** to create the request, and a history log of actions performed on it appears in the upper right corner. The history log is updated when the request is sent, edited, replied to, etc.

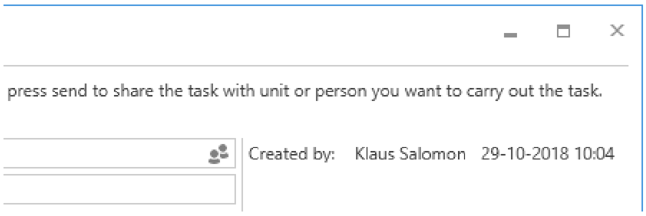

Figure 5: The request history log after creation

If a request is created with incorrect information, it can be deleted by clicking **Delete**.

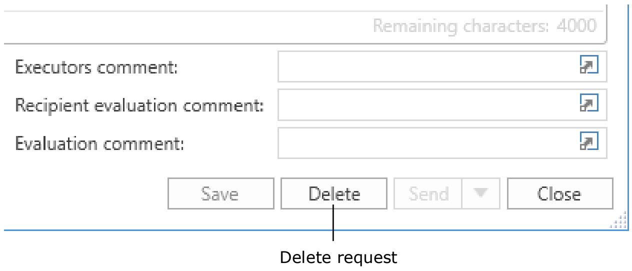

Figure 6: Delete a saved request

If the request has already been sent, it cannot be deleted, only cancelled. Cancel a request by clicking **Cancel request**. This button replaces the "Delete" button after the request has been sent.

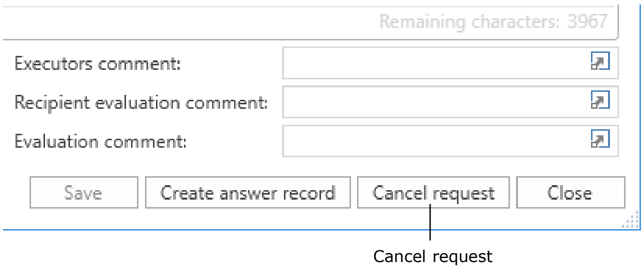

Figure 7: Cancel a sent request

Click **Send** and the recipient will receive the request in their inbox in F2. Any users specified in the "Additional recipients" field will receive copies of the request.

If the request must be sent immediately, saving before clicking **Send** is not necessary. The request is automatically saved when sent.

By default, the record creator is responsible for the record to which the request is linked. If the record creator clicks the drop-down arrow on "Send", they can allocate the responsibility of the record to the request recipient. This is done by clicking **Send and set record responsible** in the drop-down menu.

This way, the record creator reallocates the responsibility for not only the request, but the entire record, to the request recipient.

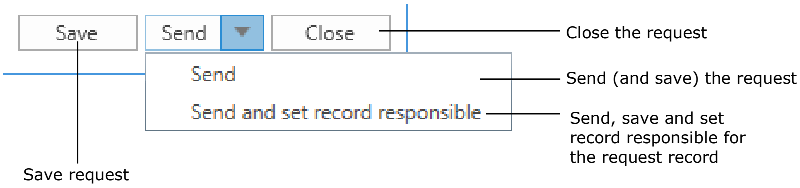

Figure 8: The request creator's options

Note: The "Send and set record responsible" function becomes active when the request is saved.

When a request is created, it can be seen and accessed from the record to which it is linked. Open the request by clicking the request icon at the top of the document selector. An overview of the request is shown. Click anywhere in the overview to open the full request window.

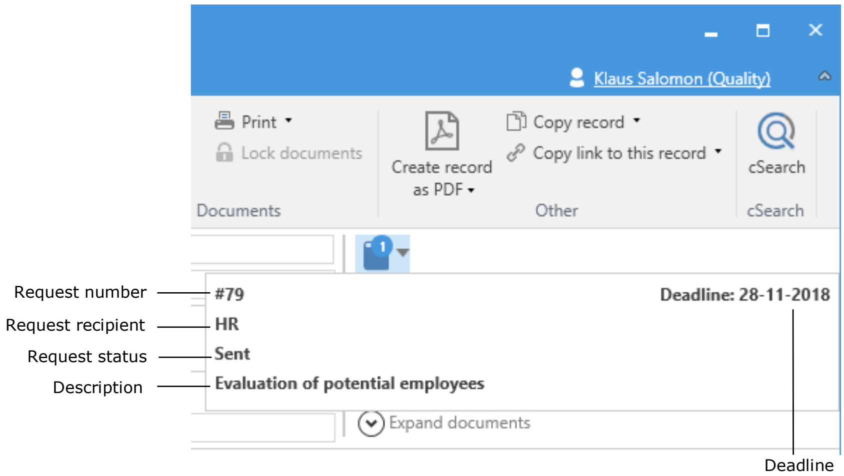

Figure 9: Click the request icon to see the request overview

The overview shows request number, deadline, request recipient(s), status, and the first part of the description for each request. Request numbers are assigned automatically and chronologically.

Receiving and accepting a request

When a request is sent, the recipient receives it in their inbox.

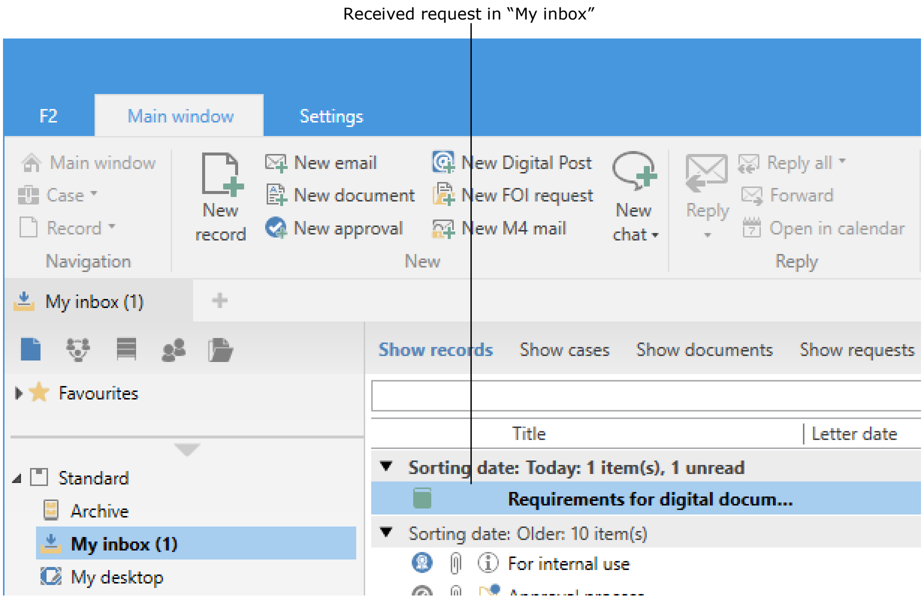

Figure 10: A request in the recipient's inbox

Double-click on the unread record to open the request.

If a record with a request is unread, the request window automatically appears when the record is opened. If the record has already been accepted, the request is marked as read and can be accessed by double-clicking the request icon in the record.

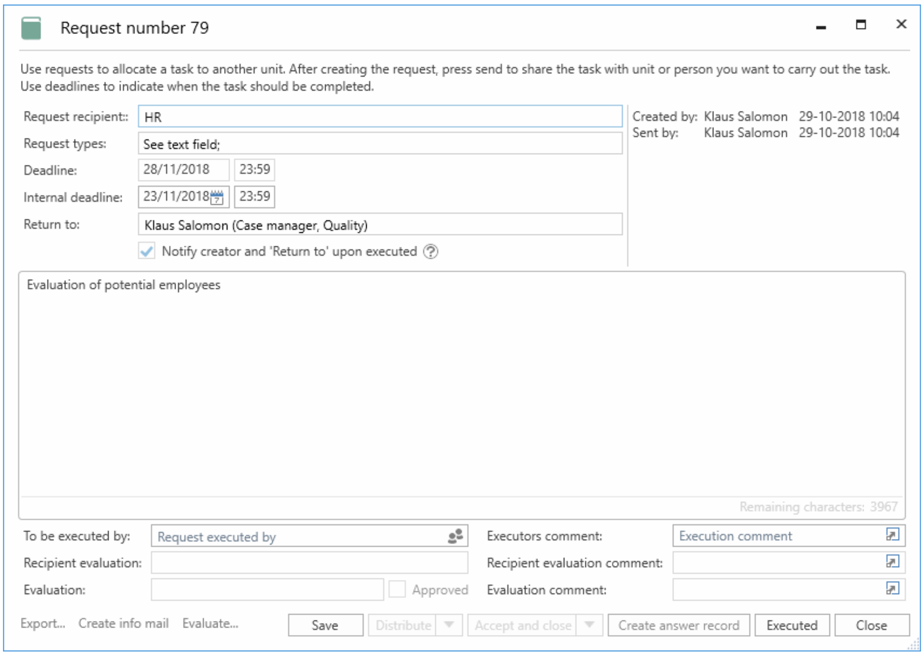

Figure 11: A received request

After receiving the request, the recipient has two options. To accept the request, the recipient clicks on either the **Accept and close** button or its **drop-down arrow**. The **Accept** button then appears with which the user can accept the request without closing the window.

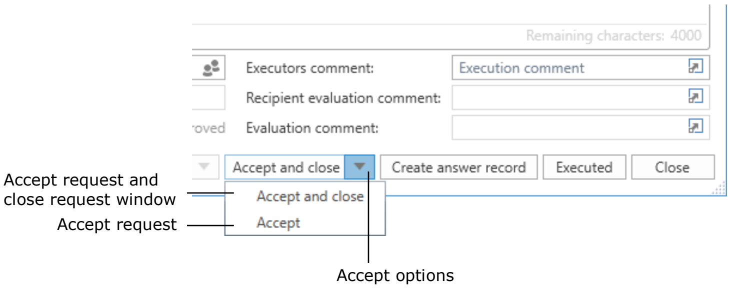

Figure 12: Options when accepting the request

If the recipient wishes to accept the request, but disagrees with one or more of the conditions, they can contact the requester, e.g. via a chat on the record to which the request is linked.

When the request has been accepted, it is noted in the history log in the top right corner of the window.

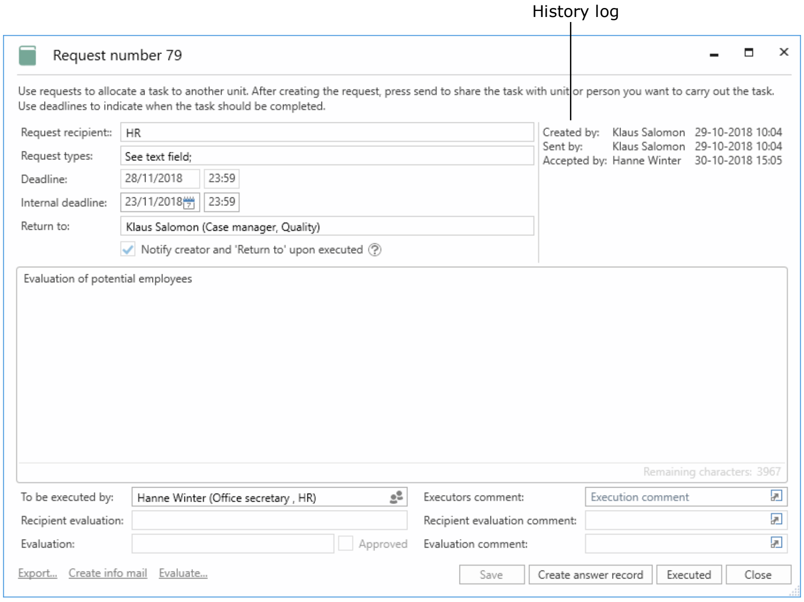

Figure 13: Accepted request

The request recipient may evaluate the quality of a submitted request. This is done by clicking **Evaluate...** at the bottom of the request window. This makes it possible to add an evaluation in the “Recipient evaluation” field and further comments in the “Recipient evaluation comment” field.

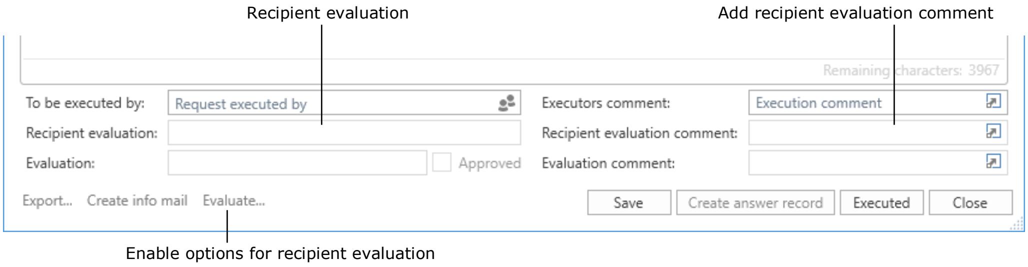

Figure 14: Request recipient evaluation options

Note: The **Evaluate...** button and "Recipient evaluation" and "Recipient evaluation comment" fields are disabled by default and must be enabled through a configuration. Configurations are made in cooperation with cBrain.

If the recipient accepts the request, but another user is to execute it, the recipient enters the executor's name in the "To be executed by" field. Click **Save** to send the request to the new executor.

If the request recipient cannot accept the request, they can choose a new request recipient. Once a new recipient has been entered, the **Distribute** button is activated. Click **Distribute** to send the request to the new recipient.

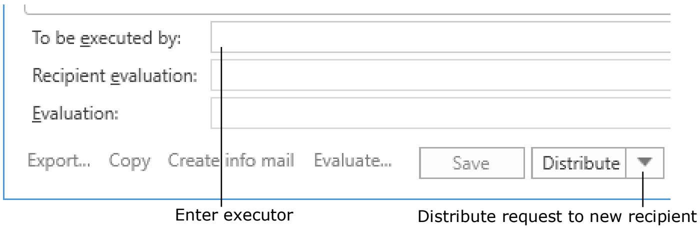

Figure 15: Additional options when receiving a request

Replying to a request

A request is replied to in one of three ways:

- Execute the request by replying to it directly in the request window.
- Reply to the request by creating and sending an answer record with **Create answer record** in the request window.

  Note that it is possible to click **Create answer record** before accepting the request as it may be practical to begin working on the reply even though the terms and conditions of the request have not yet been finalised.
- Reply to the request by selecting an existing record and attaching it as a reply to the request.

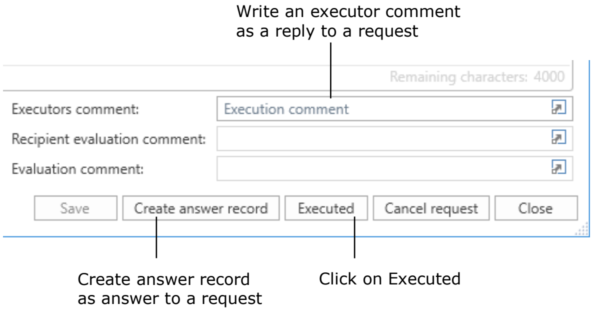

Figure 16: Reply options in the request window

Replying in the request window

Reply to the request in the request window by using the "Executors comment" field. Click on **Executed** to reply to the request with the text entered in the "Executors comment" field. This comment constitutes an answer to the request.

Creating an answer record

Reply to the request with an answer record by clicking **Create answer record**. The following dialogue opens.

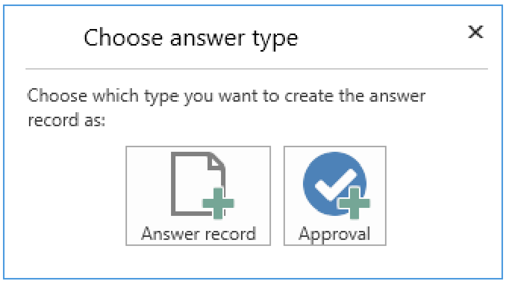

Figure 17: The answer type dialogue

It is possible to choose either an answer record or, if the add on-module is available, an approval.

> **Note**: The number of available answer types depends on the setup of F2. If regular answer records and approvals are both allowed, the answer record's type is selected in the "Choose answer type" dialogue. If only one type is allowed, the dialogue does not open.

When choosing an approval as the answer type, the request deadline is suggested as deadline for the approval as well as for the answer record to which it is linked.

The deadline for the record to which the request is linked is suggested as the reminder date.

> **Note**: It is possible to set the request record's deadline as the deadline for the answer record and its approval, while the request deadline can be set as the reminder date. This must be configured in cooperation with cBrain.

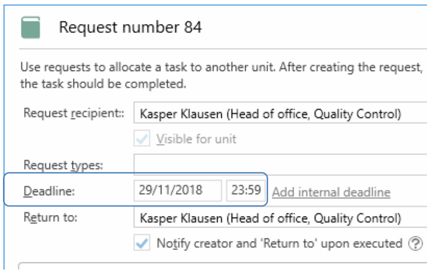

Figure 18: Request deadline

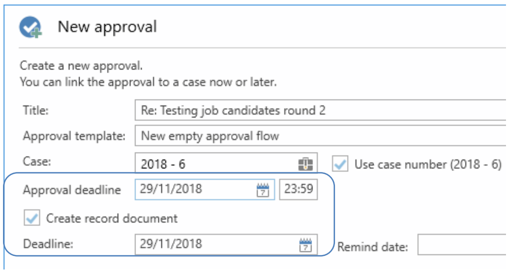

Figure 19: Request deadline suggested as approval and record deadline

Selecting **Answer record** opens the "New record" dialogue. The "Title" field automatically reads "Re: [The request record's title]".

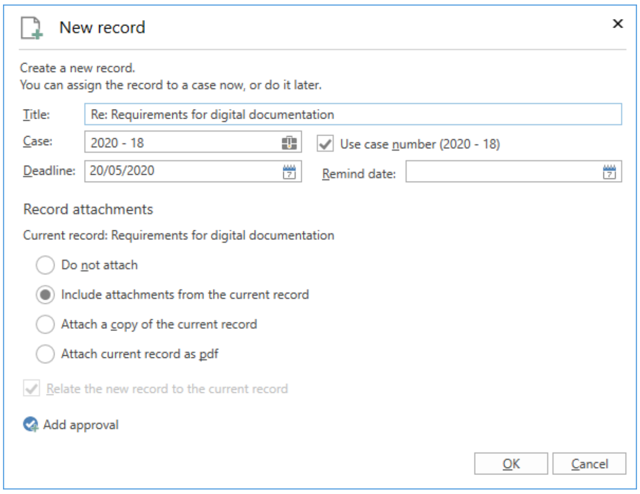

Figure 20: Creating an answer record

If the request record is linked to a case, F2 automatically suggests linking the answer record to the same case. The answer record will have the same deadline as the request, and the option to "Include attachments from the current record" will be selected. If a request has both an internal and a formal deadline, the answer record will be assigned the former. An approval can be added to the answer record at this step by clicking **Add approval** in the bottom of the dialogue. Click **OK** to create the answer record.

The answer record is automatically addressed to the user in the "Return to" field, who will receive it in their inbox when the recipient clicks **Send** in the ribbon of the record window.

Navigation between the answer record and the record to which the request is linked is facilitated by a request icon in the answer record's ribbon. This "Go to request" icon opens the record with the request.

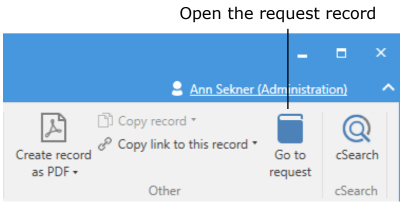

Figure 21: Navigation between answer record and request record

In a similar way, the answer record can be accessed from the request itself. Click the record ID link displayed next to the "Answer record created" entry in the history log of the request to access the answer record, as shown below.

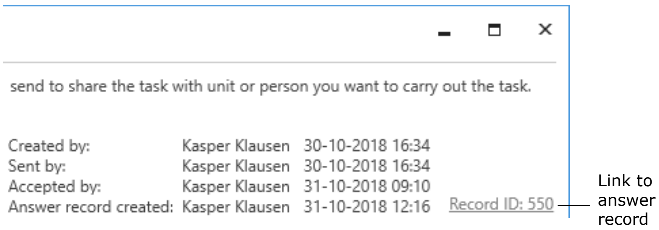

Figure 22: Link to the answer record in the request log

The answer record is displayed in the inbox of the user added in the "Return to" field of the request once the answer record has been sent. The answer is accepted by clicking **Executed**. The request has then been executed and is no longer displayed in the "F2 Requests to unit" list. For more information about the list, see *Standard request searches*.

As mentioned above, the answer record can also be an approval. This can be useful for requests involving e.g. the head of a unit.

If the answer record contains an approval, the request can be configured to show when the answer record's approval has been approved. A line is added to the request, and its status is changed to "Executed". This configuration is performed in cooperation with cBrain.

For further information on approvals, see *F2 Approvals – User manual.*

Selecting a record as reply to a request

It is possible to reply to a request with an already existing record. Right-click the record that will serve as a reply and click **Select as answer record to a request** in the context menu.

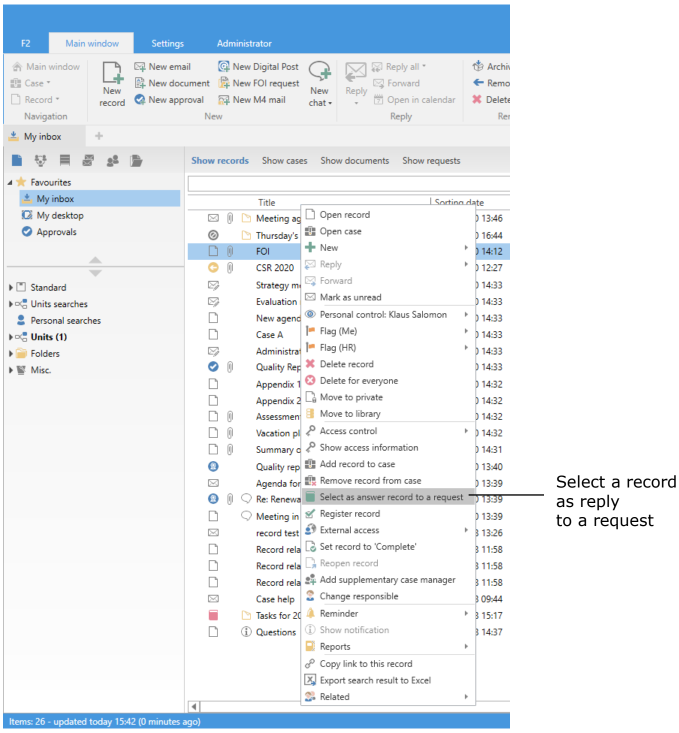

Figure 23: Existing record selected as answer record to a request

Clicking **Select as answer record to a request** opens the "Select request" dialogue displaying a list of requests on which the user is either the recipient or executor. Choose the relevant request from this list and click **Attach as answer**.

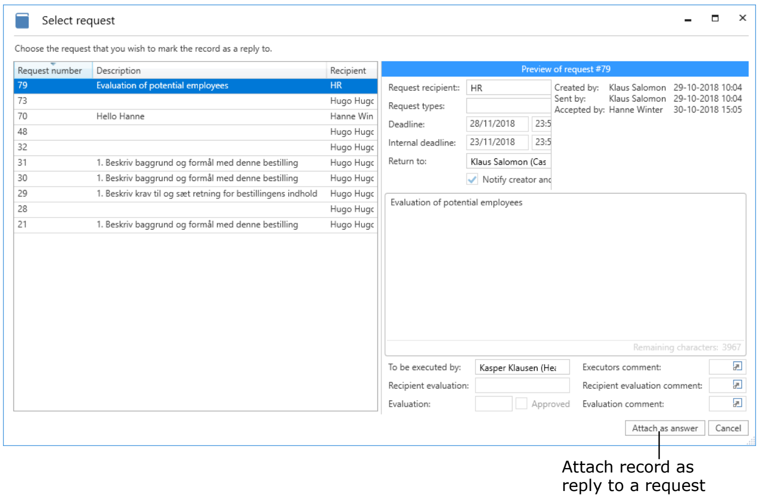

Figure 24: A record is attached as a reply to a request

Attaching a record as a reply to a request turns the record into an answer record. This is similar to creating an answer record from within the request window by clicking **Create answer record**.

However, creating a new answer record may not be the best course of action if an existing record already contains the requested information.

To attach a record as a reply to a request, a number of criteria must be met:

- The user attaching the record must have full write access to it.
- The recipient must have read access to both the request and the record to which the request is linked.
- The record must not already be attached as a reply to another request.
- The record must be of a type (regular record or approval) that F2 Request's setup allows as answer record.

When the record has been attached as an answer record, it will appear in the unit inbox of the "Return to" user. The rest of the execution process is similar to that of using a newly created answer record. For further information, see the section *Creating an answer record*.

Note: When a record is attached to a request, the history log displays its original creation date and not the date of the attachment.

Finalising a request

The executed request is sent to the "Return to" user's inbox.

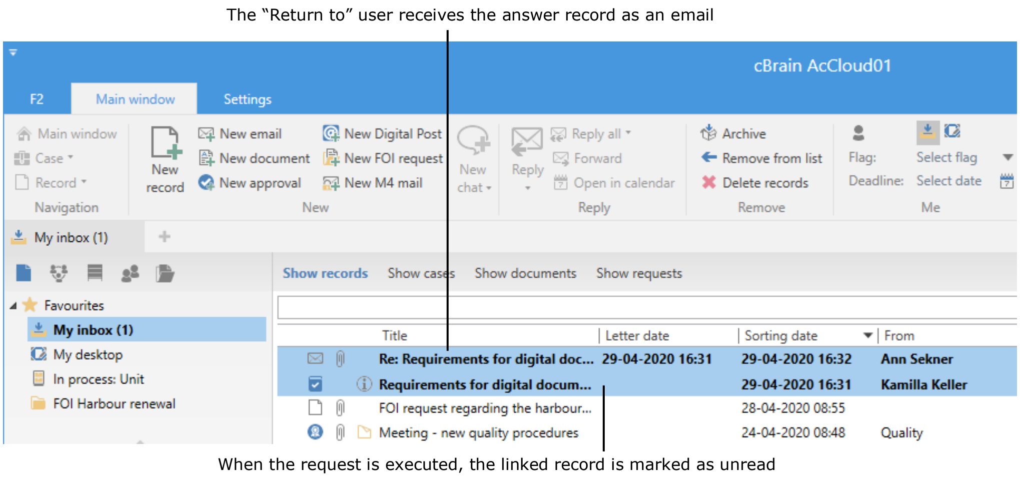

Figure 25: Executed request and answer record in "Return to" user's inbox

The request is finalised by the "Return to" user who may add an evaluation, an evaluation comment, an approval or a combination of these.

Click the **drop-down menu** in the "Evaluation" field to evaluate the request. In the "Evaluation comment" field, a remark may be added. Tick the "Approved" box to approve the request reply.

Note: The **Evaluate...** button and "Evaluation" and "Evaluation comment" fields are disabled by default and must be enabled through a configuration. Configurations are made in cooperation with cBrain.

If the reply to the request is satisfactory, click **Set request to 'Finalised'**.

Note: The “Before deadline” log entry, which is shown when the request has been executed, is based on the formal deadline of the request and not an internal deadline.

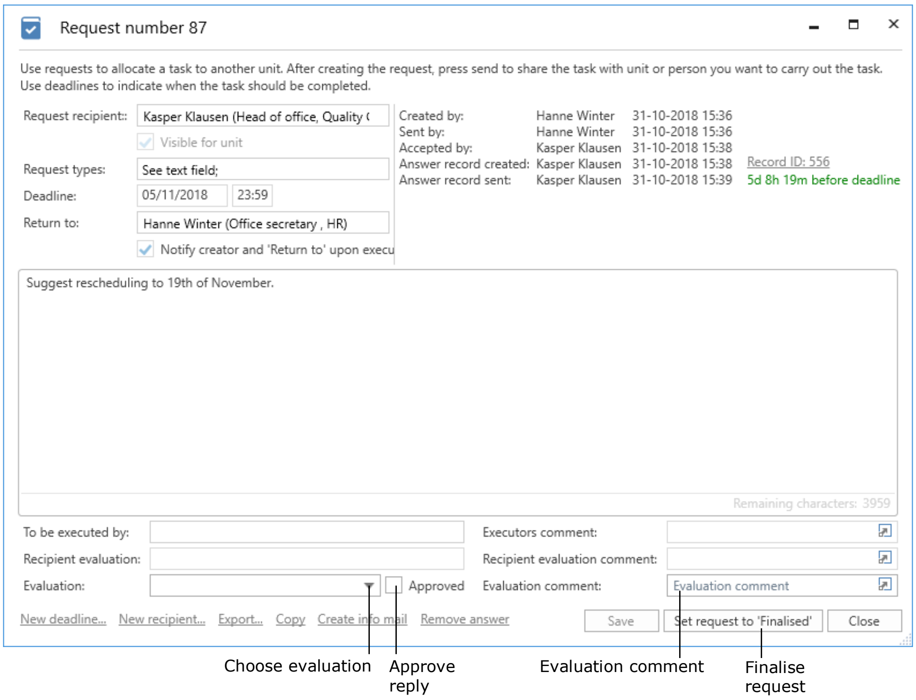

Figure 26: Request returned by the executor

Once the request is finalised, it will appear in the history log.

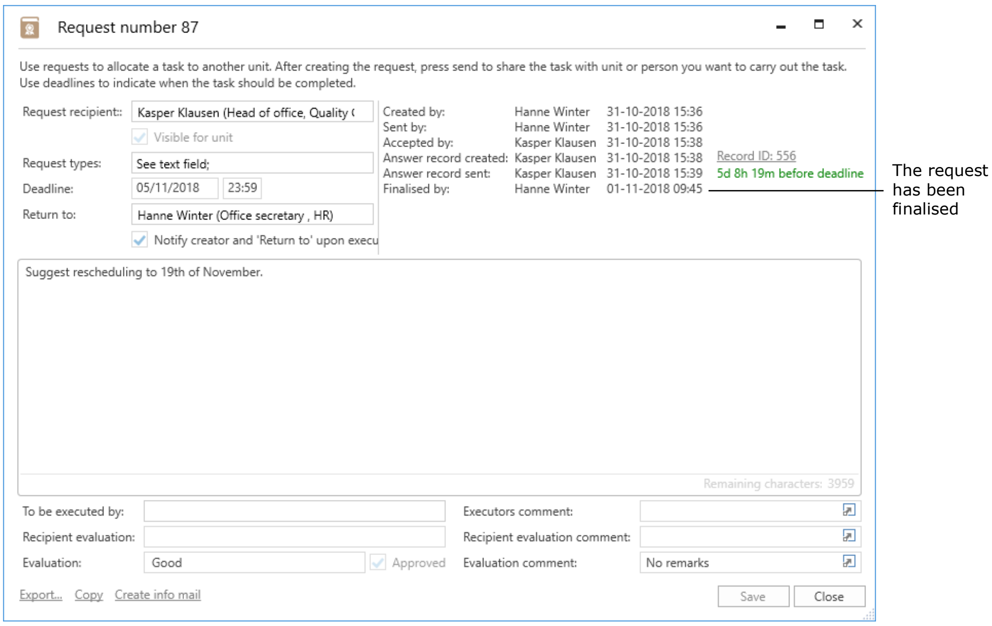

Figure 27: The finalised request

The request’s approval status, evaluation, and evaluation comment will then be visible to the request recipient.

Note: The requester can finalise the request at any time. This changes the request icon to the finalised .

Note: F2 can be configured to either allow all users to finalise requests or only users in the requester's unit.

When the request has been finalised, it disappears from the "F2 Requests from unit" list.

Finalised requests can still be viewed and accessed in F2's main window. For further information about the default lists and searching for finalised requests, see *Request overview in F2 Desktop*.

Additional functions

In addition to the above, F2 Request offers a number of extra functions. These practical tools are described in this section.

At the bottom left of the request window, a number of additional functions are available.

The available functions depend on the status of the request. The table below lists each additional function.

Function	Purpose
"Finalise now…"	Allows the requester to finalise the request immediately, even if it has not been processed by the executor.
"New deadline…"	It is possible to change the deadline for a request after it has been accepted by the recipient. This can only be done by the requester. If the requester changes the deadline, the recipient and the executor will receive a notification in their F2 inbox.
"New recipient…"	A new recipient may be added. If the previous recipient has already accepted the request, the acceptance is cancelled.
"Export…"	The request is exported and saved in XML format on the user's computer.
"Copy"	Creates a copy of the request on the same record, but with a new request number.
"Create info mail"	Creates an email with the request attached to inform a third party of the request. The third party must be registered in the participant register.

Function	Purpose
“Remove answer”	This function appears when an answer record is created/attached to the request. Click **Remove answer…** to remove the answer record. This will also remove the creation of the answer record from the history log of the request.

Request overview in F2 Desktop

Working daily with F2 Desktop, the amount of requests may quickly accumulate, so a list of active requests is a practical tool that comes with any F2 installation. F2 Request offers tools for adjusting the lists through search and display options.

Besides regular requests, the lists also contain group and external requests if these add-on modules are available.

Standard request searches

F2 comes with two standard request searches:

- "F2 Requests to unit"
- "F2 Requests from unit"

These standard searches are located in the "Units searches" node in the lists at the left of the F2 main window. In the example below, they are displayed in the "Doc Organisation" node.

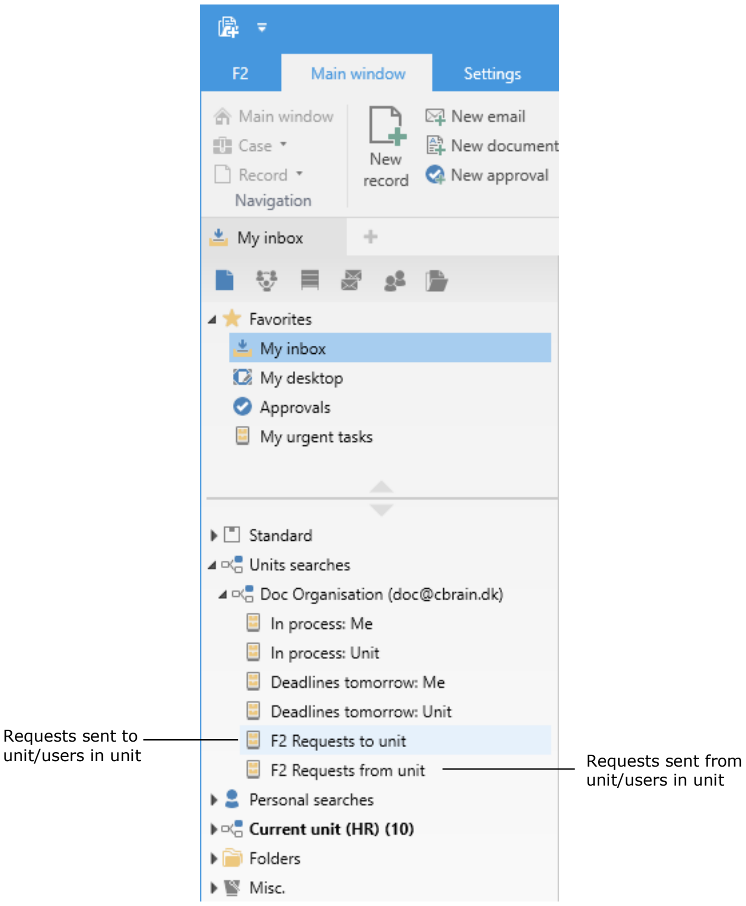

Figure 28: Request lists

Request recipients will see any received requests in the “F2 Requests to unit” list. This list shows all records with requests in which the recipient is the user’s current unit or a user within the unit.

In the same manner, the “F2 Requests from unit” contains all sent requests. This list shows all records with requests in which the sender is the user’s current unit or a user within the unit.

Requests are also displayed in the request sender’s “My sent records” list and in the request recipient’s “My inbox” list.

Searching for requests

All requests regardless of status can be found in the “Archive” list. This allows the user to create an overview of all requests to which they have at least read access.

Only advanced searches should be made in the “Archive”. It is therefore possible to refine the search using the metadata fields for requests by clicking on **Advanced search** in the main window ribbon and then selecting the “Request” search group.

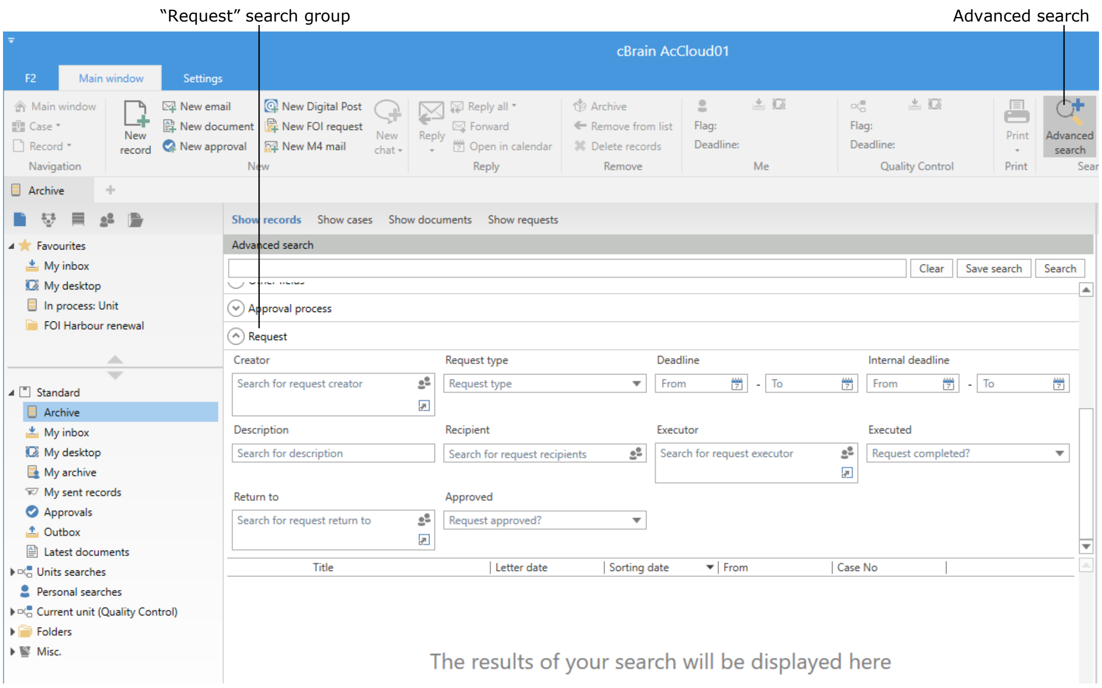

Figure 29: Advanced search for requests in the “Archive”

As with the standard searches of the list view, this search will show requests both to and from the user and their unit.

For further information on performing searches in F2, see the manual *F2 Desktop – Searches*.

List display options

The result list can be adjusted to provide a better overview of requests in “My inbox” as well as in searches for requests specifically. Adjust the result list by clicking the **Show requests** display option, and by adding relevant columns.

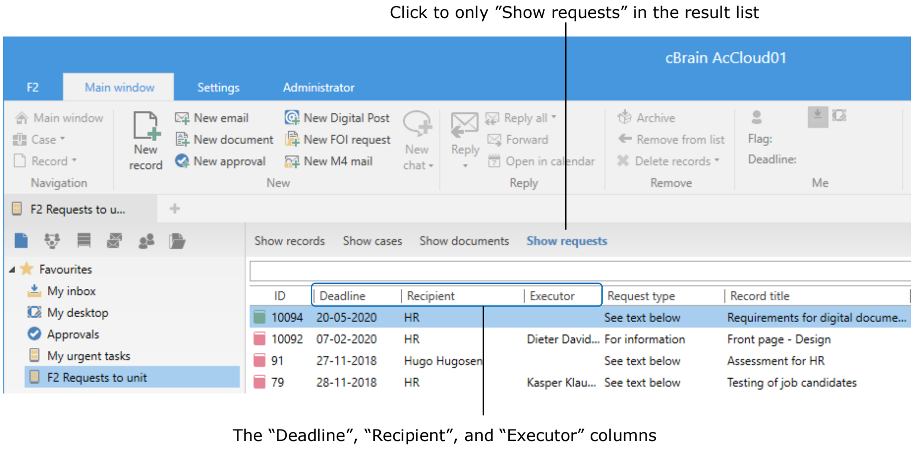

Figure 30: Columns in the request list view

Certain columns are helpful when it comes to keeping track of requests, e.g. “Deadline”, “Recipient” and “Executor”.

Hover the cursor over a request icon to see a tool tip with information on status, deadline, requester, recipient, and a description of the request.

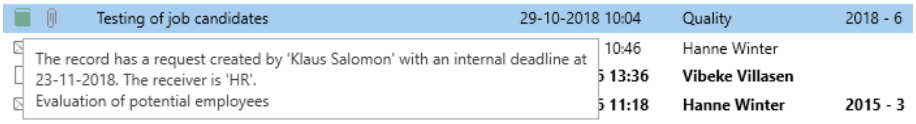

Figure 31: Mouse over tool tip for a request

Request icons

Depending on the deadline and status of the request, the request icon changes as shown in the table below.

Icon	Function
	Create new request.
	Request without deadline.
	Request with more than seven days until deadline.

Icon	Function
	Request with less than seven days until deadline.
	Request with an exceeded deadline.
	Edited* request without deadline.
	Edited* request with more than seven days until deadline.
	Edited* request with less than seven days until deadline.
	Edited* request with exceeded deadline.
	Executed request.
	Cancelled request.
	Finalised request.

*=I.e. changes to deadline, request type or description after the request has been sent.

F2 cPort LIS Request (add-on module)

F2 cPort is a data extraction tool intended for users with the "Access to cPort" privilege. With cPort a user can extract data and create reports from information accessible throughout F2.

F2 cPort LIS Request is an add-on module that builds on the F2 cPort module. cPort LIS Request is developed to extract request-related data which can be used for generating reports.

cPort LIS Request comes with three data groups for generating reports related to:

- Regular and group requests
- Outgoing external requests
- Incoming external requests.

The kind of data available in cPort LIS Request depends on the configuration of the authority's F2 Request as well as the request types used. For further information, see *F2 cPort LIS Request – User manual.*

Configurations for F2 Request

F2 Request can be configured to fit the needs of the individual organisation. The following functions can be configured in cooperation with cBrain:

- Whether the checkbox "Notify creator and 'Return to' upon executed" is automatically ticked when a new request is created.
- Whether the **Evaluate...** button and its associated evaluation fields are enabled. It is also possible to set up whether the fields can be filled out by all users or only the request recipient and the "Return to" user.
- Whether answer records can be created as regular records, approval records, or both. If both types are allowed, the user selects the appropriate type in the "Choose answer type" dialogue.
- Set up whether the request record's deadline rather than the request's deadline should be set as record and approval deadline for the answer record, while the request deadline rather than the request record's deadline is set as reminder date.
- Set up whether internal approvals of answer records are logged in the history log after the approval is finalised. A line is added to the request, and the request's status updates to "Executed".
- Set up whether a request can be finalised by all users or only by those in the request creator's unit.

List of Figures