cBRAIN™

F2

Touch

Version 8

Table of contents

Reading instructions

This manual is written for users of F2 Touch.

The manual contains a short introduction to F2 Touch 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 Touch

F2 Touch supports case work on the go across different devices such as iPhones, iPads, and Android smartphones and tablets, as well as common Internet browsers for PC and Mac.

F2 Touch can be downloaded as an app using either Apple App Store or Google Play. The F2 Touch client also functions in the browsers of the above mentioned mobile devices. This manual is primarily based on the F2 Touch app.

F2 Touch is a lighter version of F2 Desktop containing selected functions such as case and email processing, chats, approvals, requests and more. There are minor differences in the functionality between F2 Desktop and F2 Touch. These differences are described where relevant.

F2 Touch supports two different layouts that are automatically selected depending on the size of the window that is used:

- **Compact layout**: For devices with smaller screens e.g. smartphones such as iPhones and Android phones.

- **Wide layout**: For devices with larger screens like iPads, Android tablets, Mac, and PC.

There are no functionality differences between the compact and the wide layout. This manual is primarily based on an iPhone version and the compact layout. If there is a variation between iPhone and Android, it will be mentioned.

Download and set up F2 Touch

F2 Touch is available in the Apple App Store for iPhone and in Google Play for Android.

As settings and setup vary according to the operating system of the device, the following sections have been divided into the two operating systems: *Setup and settings for iOS* and *Setup and settings for Android*.

Setup and settings for iOS

In order to use F2 Touch, the app must first be set up to the correct server address.
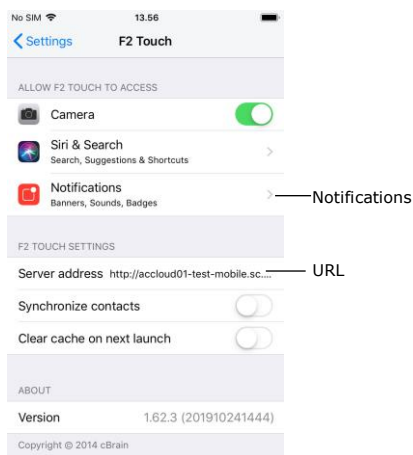
Figure 1: Server address on iOS

To set up F2 Touch on an iPhone or iPad, tap **Settings** on the device. Tap **F2 Touch** in the menu and the screen in the figure to the left appears.

Next to the "Server Address" field, enter the URL for F2 Touch. The URL is provided by cBrain.

Log in to F2 Touch on iOS

When F2 Touch is set up and the app is opened, a login screen appears. Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using one's password, fingerprints or Face ID, or by selecting "Remember me". The desired method is chosen upon login.

If the "fingerprint" or "Face ID" login features are enabled in addition to "Remember me" in the organisation's configuration, the user can choose which login method to use. It is possible to switch between the different options as long as the configuration allows it.

For safety reasons a user must enter their password every 30 days.
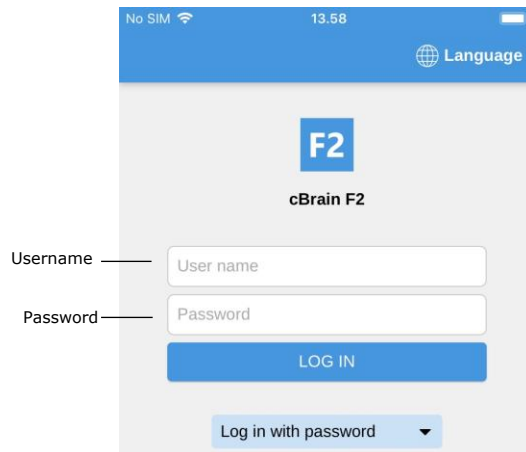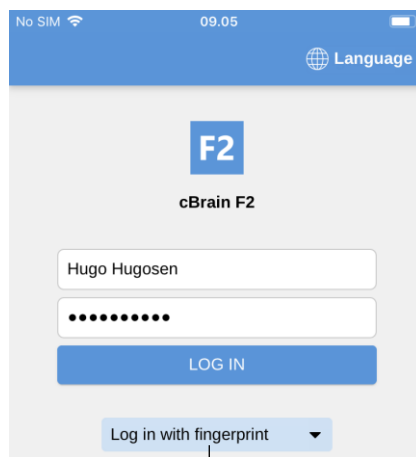
Log in using a password on iOS

It is possible to log in using a password as when using F2 Desktop.

Fill in the "Username" and "Password" fields, using the same information used to log in to F2 Desktop.

Then tap **Log in** to log in.

Figure 2: Log in using a password

Log in using Touch ID on iOS

Select "Log in with fingerprint" in the menu

Figure 3: Activate Touch ID

Devices such as iPhone 5S or newer models support Touch ID (fingerprint).

Note: Touch ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option "Log in with fingerprint" in the dropdown menu, as shown in the figure to the left. The user's finger is then scanned to activate the fingerprint scanner.

Note: Touch ID can only be activated after logging in using a password.
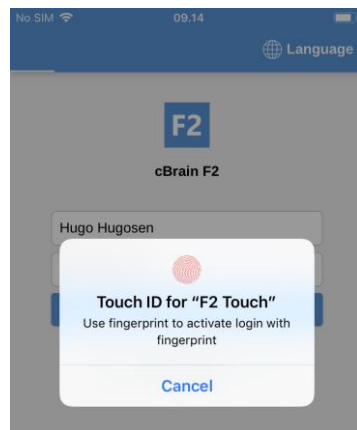
Figure 4: Log in using Touch ID

When Touch ID is enabled, the finger is scanned to log in to F2 Touch. The figure on the left illustrates the login screen when using the fingerprint login option.

Unsuccessful Touch ID login attempts are handled by the device's operating system. iOS allows three failed login attempts, after which the password must be entered. Tap **Cancel** to return to the login screen.
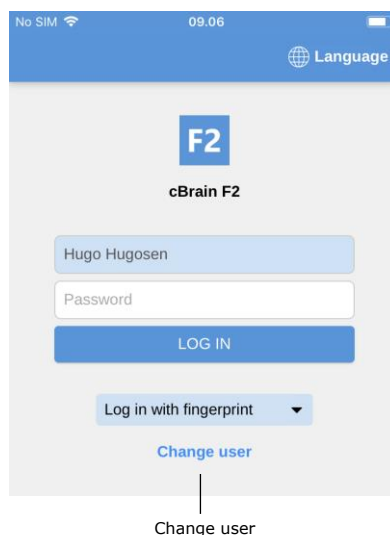
Change user
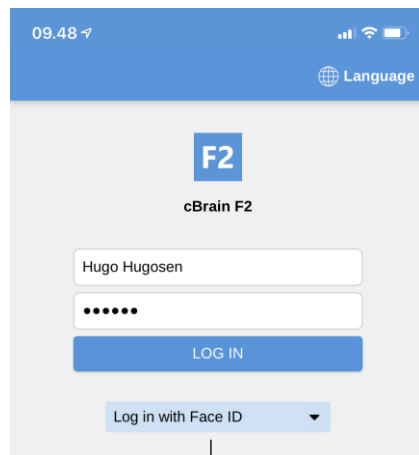
Figure 5: Change user

If a user cancels the login and returns to the login screen, F2 Touch allows the user to change user as shown in the figure to the left.

Tap **Change user** and enter the new login details. Then tap **Log in**.

Log in using Face ID

F2 Touch for iOS supports Face ID on iPhone X (or newer), which makes it possible to log in to F2 Touch using facial recognition.

Select "Log in with Face ID" in the menu

Figure 6: Activate Face ID

Note: Face ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option "Log in with Face ID" in the dropdown menu, as shown in the figure to the left. The user's face is then scanned to activate the scanner.

Note: Face ID can only be activated after logging in using a password.

Log in using "Remember me" on iOS
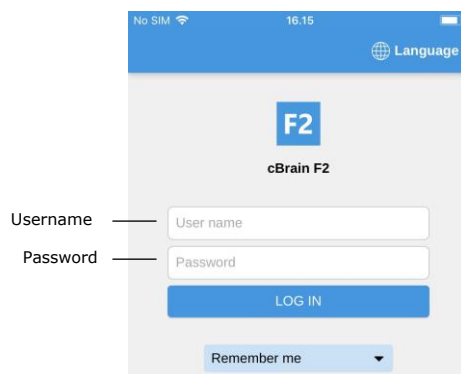

Figure 7: Log in using "Remember me"

When using the login method "Remember me", the user does not need to enter their login credentials every time they log in to F2 Touch.

Note: Face ID can only be activated after logging in using a password.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

Note: The login page remembers the latest user, unless the user manually logs out of F2 Touch.

The login role selector
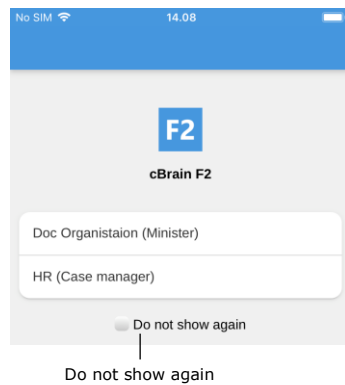
Do not show again

Figure 8: Select role at login

If a user has multiple roles in F2, it is possible to choose between them during login.

Tap "Do not show again" to avoid being presented with the role selector during the next login.

The user can select a default login role in the F2 Desktop user setup.

For more information about standard roles, see *F2 Desktop – Settings and Setup*.

Personal settings on iOS

Personal settings can be adjusted in F2 Touch. To see the overview of lists and folders either swipe right on a list or tap the **menu icon** . Then tap on **Settings** in the top right corner.

Show lists and folders or swipe right
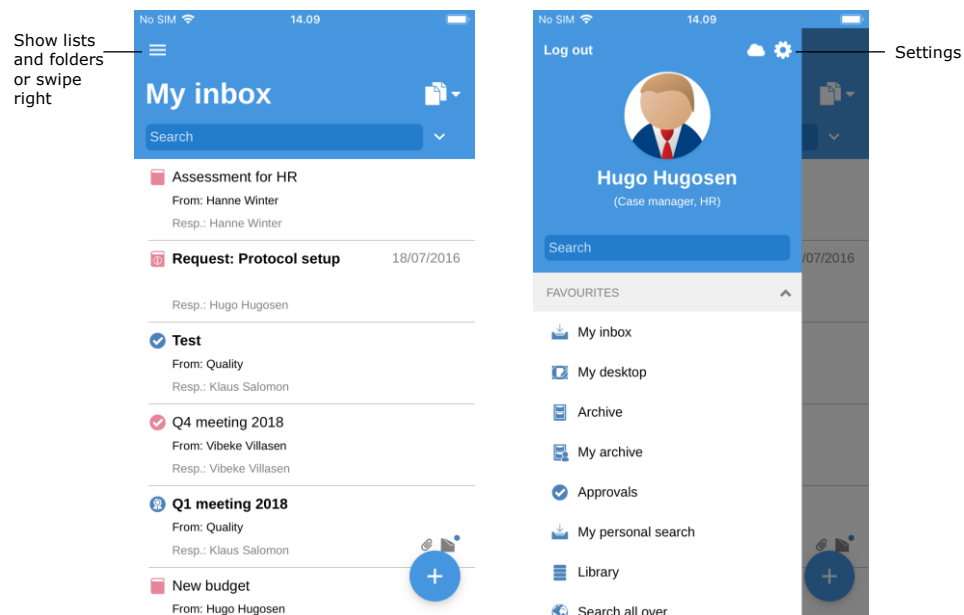
Settings

Figure 9: Open settings on iOS

Go back   Save
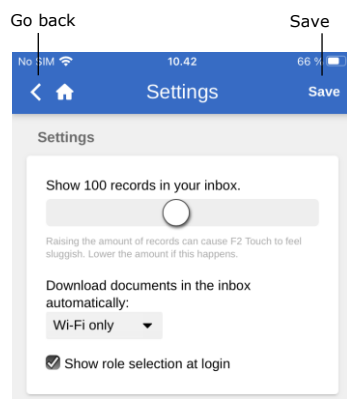
Figure 10: iOS settings

In "Settings" it is possible to e.g. adjust the number of files shown in the inbox and to toggle the role selector upon login.

It is also possible to choose when to download documents in the inbox. There are three options:

- Always. Documents are downloaded whenever there is an Internet connection.

- Wi-Fi only. Documents are downloaded when the device has a Wi-Fi connection.

- Never. Documents are not downloaded.

Save the settings by tapping **Save**. Return to the former list by tapping ◁ in the top left corner.

Setup and settings for Android

In order to use F2 Touch, the app must first be set up to the correct server address. The first time F2 Touch is opened on an Android device, a server address must be entered. In the "Server URL" field, enter the URL for F2 Touch provided by cBrain. Here the user can also choose whether or not to use a secure connection. Then tap **Continue** to proceed to the login screen.

Log in to F2 Touch on Android

When the F2 Touch server address is entered, a login screen appears. Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using one's password or fingerprints, or by selecting "Remember me". The desired login method is chosen upon login.

If the "Remember me" and "fingerprint" login features are both enabled in the organisation's configuration, the user can choose which login method to use. It is possible to switch between the different options as long as the configuration allows it.

Return to login page
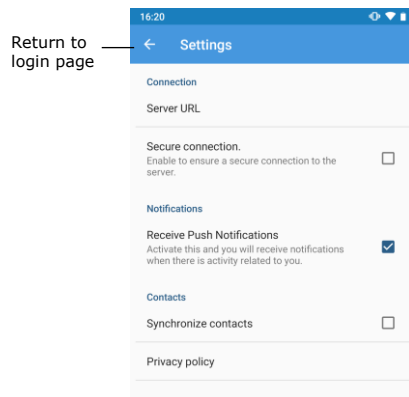
Figure 11: Android settings

Some settings can be adjusted before logging into F2 Touch.

Tap **Settings** ⚙ in the upper right corner of the login page to open the settings.

Enter the server URL and choose whether F2 should use a secure connection.

These settings also allow the user to toggle notifications and to synchronise contacts with F2 Touch.

Tap **the arrow** in the upper left corner to save any changes and return to the login page.

Log in using fingerprint on Android
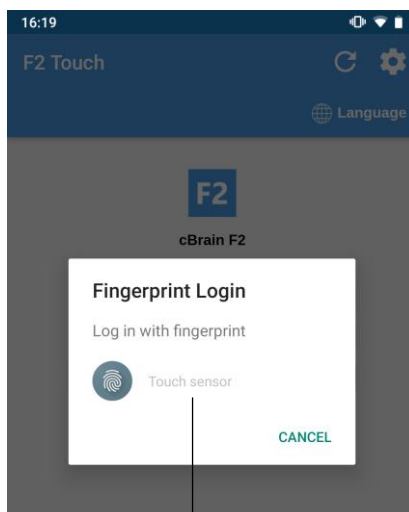
Scan finger to activate "Fingerprint login"

Figure 12: Activate Fingerprint Login

It is possible to log in using the fingerprint login function on Android devices that support this feature.

Enter username and password and tap **Log in**. A new dialogue in F2 Touch appears, asking the user to "Touch sensor". This is displayed in the figure on the left.

Now scan the finger to activate the fingerprint login function.

Once the fingerprint login is activated, the user simply scans their finger to log in to F2 Touch.

> **Note**: The fingerprint login function can only be activated by logging in once using a password.

Unsuccessful fingerprint login attempts are handled by the individual device's operating system. Tap **Cancel** to return to the login screen.
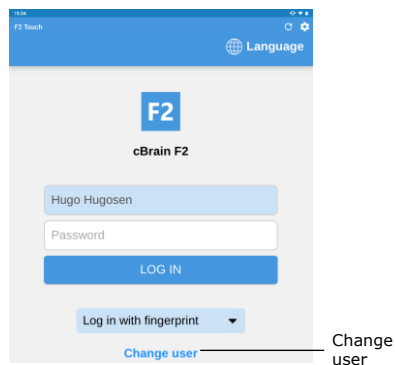
Figure 13: Change user

After cancelling a login and returning to the login screen, it is possible to "Change user" as shown on the figure to the left.

Tap **Change user** and enter the new login details. Then tap **Log in**.

If it is not possible to log in using the fingerprint login option or if the user does not want to log in this way, it is possible to choose to log in the same way as in F2 Desktop.
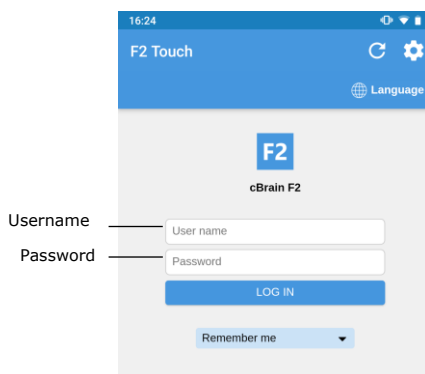
Log in using a password
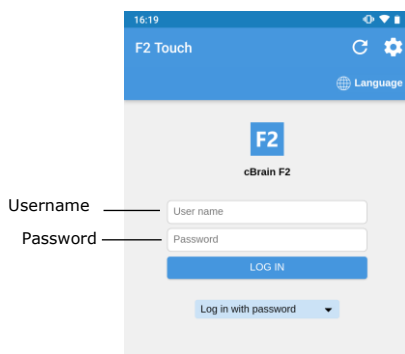
Figure 14: Log in using a password

It is possible to log in using a password similarly to logging in on F2 Desktop.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

Log in using "Remember me"

Figure 15: Log in using "Remember me"

When using the login method "Remember me", the user does not need to enter their login credentials every time they log in to F2 Touch.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

Note: The login page remembers the latest user, unless the user manually logs out of F2 Touch.

The login role selector
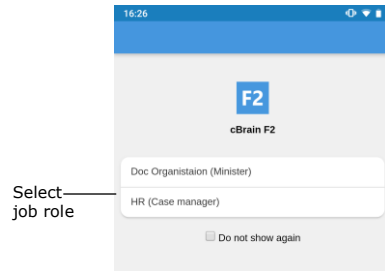
Select job role

Figure 16: Select job role on Android

If a user has multiple roles in F2, it is possible to choose between them during login.

Tap "Do not show again" to avoid being presented with the role selector during the next login.

The user can select a default login role in the F2 Desktop user setup.

For more information about standard roles, see *F2 Desktop – Settings and Setup*.

Select language
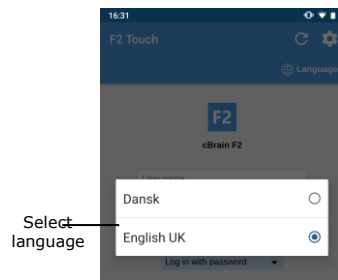
Select language

**Figure 17: Select language on Android**

Select the language for F2 Touch on the login page.

Tap **Language** and select the wanted language in the dialogue. This is only possible if the F2 installation supports more than one language.

Note: F2 Touch always displays the language that was selected at the initial login.

Personal settings for Android

Once logged in, it is possible to customise the personal settings in F2 Touch. To see an overview of the lists and folders, either swipe right on a list or tap the ☰ icon in the upper left corner. Then tap **Settings** ⚙ in the upper right corner.

Tap or swipe right to view lists and folders
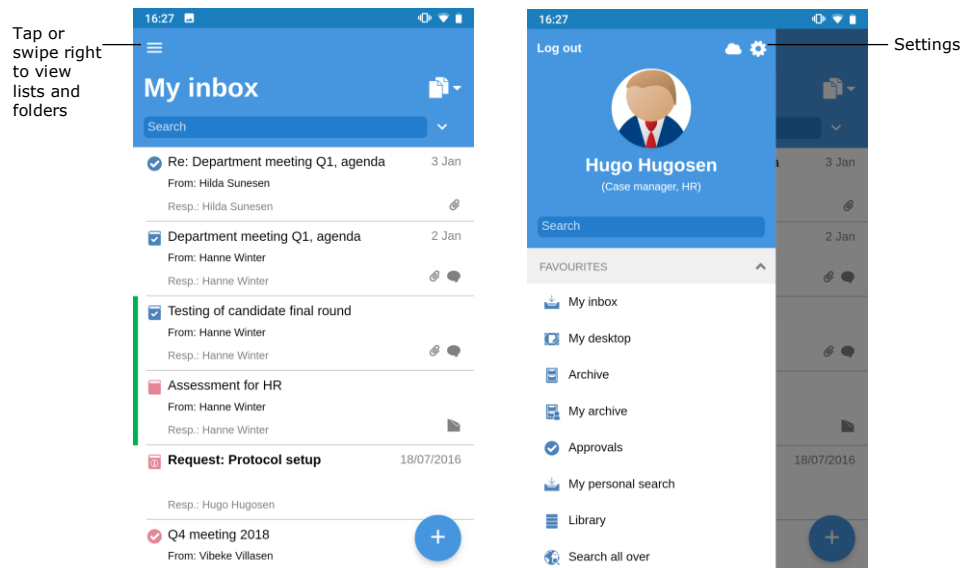
Settings

Figure 18: Open settings on Android
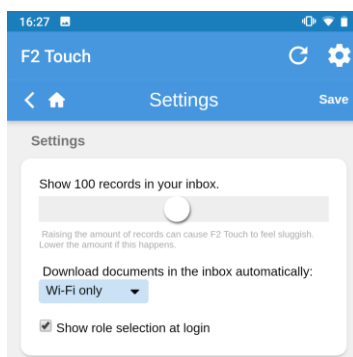
Figure 19: Customise settings on Android

In "Settings", it is possible to change the number of items shown in the inbox and to toggle the role selector on login.

It is also possible to choose when to download documents in the inbox. There are three options:

- Always. Documents are downloaded whenever there is an Internet connection.

- Wi-Fi only. Documents are downloaded when the device has a Wi-Fi connection.

- Never. Documents are not downloaded.

Save the setup by tapping **Save**. Return to the previous list by tapping .

Managing personal settings

The following sections describe how to manage the personal settings in F2 Touch and apply to both iOS and Android devices.
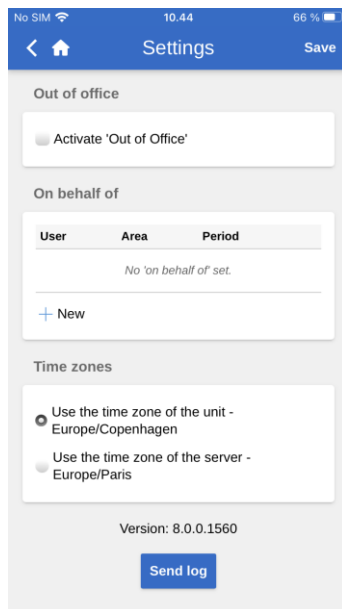
**Figure 20: Managing personal settings**

In F2 Touch, a user can grant "on behalf of" rights to another user and set themself as "Out of office".

Swipe right and tap **Settings** ⚙ to manage personal settings.

The following sections describe how to manage personal settings in F2 Touch.

"Out of office"

As with F2 Desktop, it is possible to edit and set up an "Out of office" message in F2 Touch. The procedure is the same as in F2 Desktop.
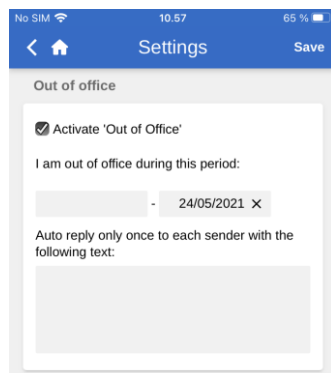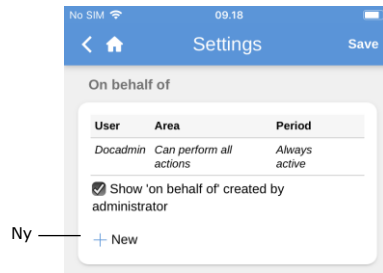

Figure 21: Setting up "Out of office"

Tap **Activate 'Out of Office'** and specify:

- Return date. Specify a period by filling out the two date fields. Tap a field to open a calendar.
- The automatic reply that is sent to those who contact the user during the absence. This applies both internally and externally.
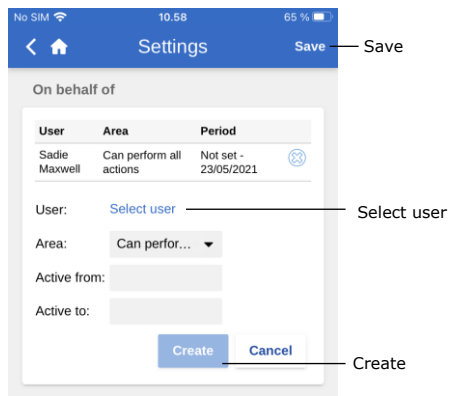
When the information is entered, tap **Save**.

"On behalf of" rights

Figure 22: New "On behalf of"

A user can assign "on behalf of" rights to another user in F2 Touch by tapping **New** in the "On behalf of" header.


Figure 23: Setting up "On behalf of"

It is then possible to specify:

- Which user the privilege is given to.

- If the user who has been given the privilege should be able to perform all actions on behalf of the original user or only handle approvals (if the add-on module F2 Approvals has been purchased).

- From when the "on behalf of" rights are active.

- When the "on behalf of" rights expire.

Tap **Create** to complete.

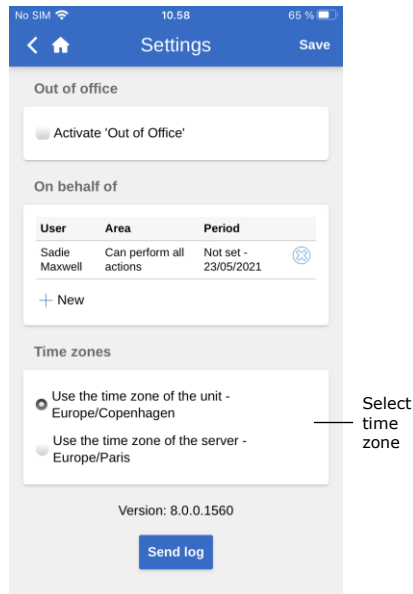Remember to tap **Save** to keep the changes.
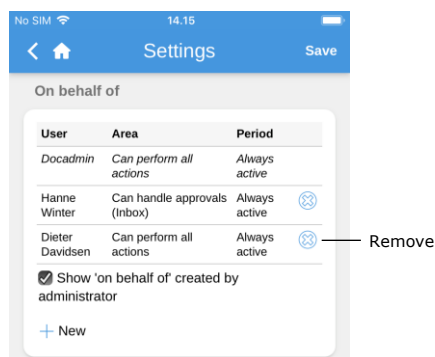
Figure 24: Remove "On behalf of"

"On behalf of" rights are removed from a user by tapping the **X** next to the specific user.

Tick the "Show 'on behalf of' created by administrator" box to display any users with "on behalf of" rights created by a user with the "On behalf of administrator" privilege.

By default, only the users with "on behalf of" rights created by the user themself are displayed.
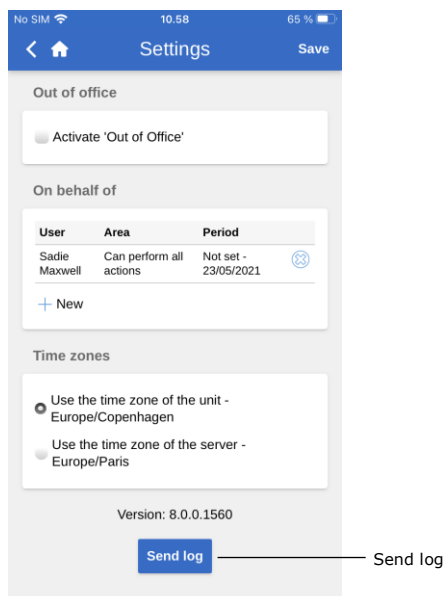
Select time zone

By default, F2 Touch's time and date are based on the unit's time zone.

F2 Touch can be configured to allow the use of the server's time zone. If the configuration is available, select the desired time zone in "Settings". The configuration is set up in cooperation with cBrain.

The selected time zone is used for deadlines and similar fields. If the user has chosen the unit's time zone, deadlines will be shown in their native time zone when abroad. This also applies when a time and date is set for e.g. deadlines or searches. F2 users in a different time zone will see the date and time in their local time. If the time and date is generated on the server, it will always reflect the server's time zone.
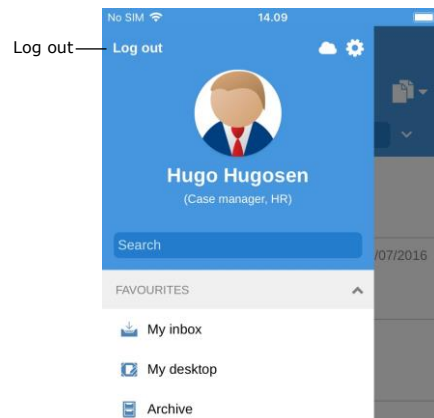
Figure 25: Select time zone

Send log manually

At the bottom of the "Settings" page it is possible to send logs manually.

Tap the **Send log** button to send a log to cBrain. This option can be used to report any errors experienced in F2 Touch.
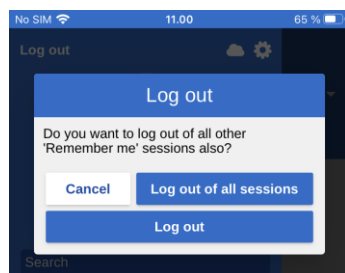
Figure 26: "Send log" in "Settings"

Log out and "Remember me"

Figure 27: Log out of F2 Touch

To log out of F2 Touch, swipe right and tap **Log out**.

Depending on the configuration of F2 Touch, "Remember me" can be disabled by selecting **Log out** on all units for which this function has been active.

Figure 28: The "Log out" dialogue

By tapping **Log out**, a dialogue appears as displayed to the left. In this dialogue there are three options:

- **Log out**: The user is logged out of F2 Touch, but F2 Touch will keep the tick in the "Remember me" box.

- **Log out of all sessions**: F2 Touch removes the tick in the "Remember me" box.

- **Cancel**: Cancels the action and returns the user to the list view.

Lists and folders

F2 Touch contains the majority of all the lists and folders that a user has access to in F2 Desktop, such as "My desktop", "My archive", and favourite and personal searches. The "Latest documents" list is not available.

Show lists and folders

Swipe right from the inbox or a list to see an overview of the lists and folders. Swipe left to hide the overview again.

The user identification is displayed above the overview. Here the user settings can also be accessed.

The displayed lists can be filtered. To filter a list, enter a word in the search field. F2 Touch will then automatically show the lists that contain the search word. This provides a quick overview in a large number of lists.
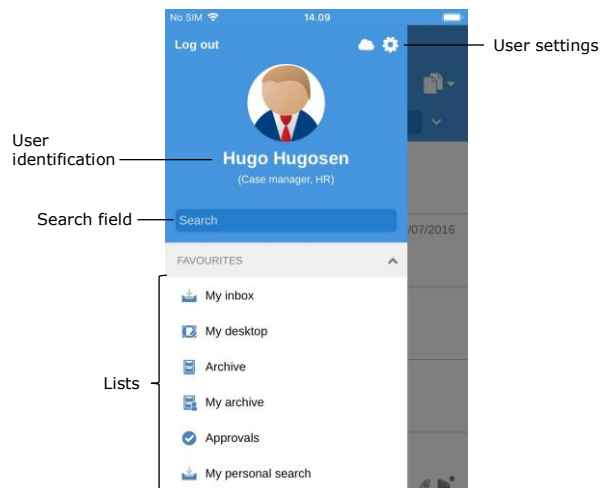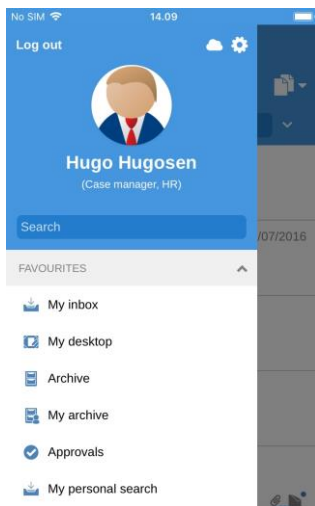

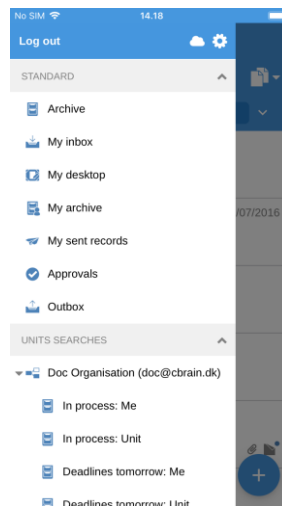**Figure 29: The overview of lists and folders**

Lists and folders can also be accessed by tapping the ☰ icon in the upper left corner.
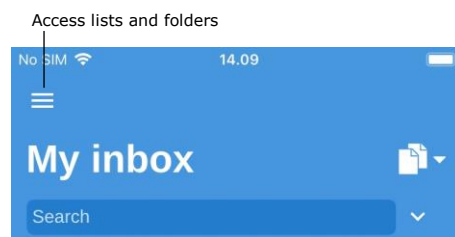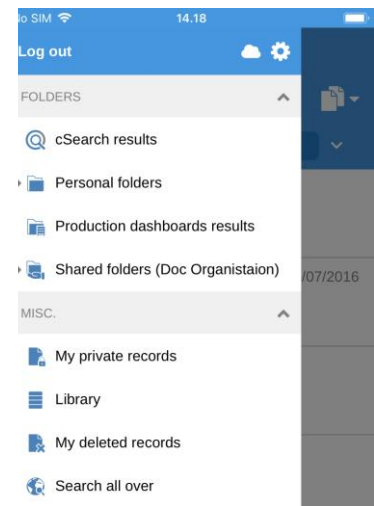

Figure 30: Access lists and folders
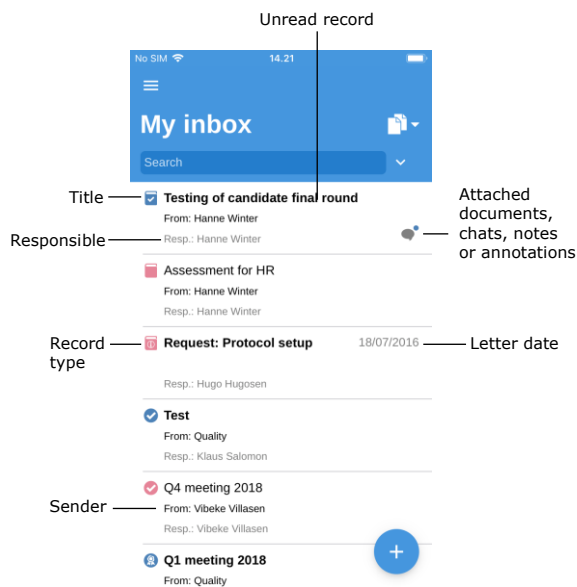
Figure 31: Favourites

Figure 32: Lists and unit searches

Figure 33: Folders and misc.

My inbox

When F2 Touch is opened, "My inbox" is displayed as shown below.


Figure 34: My inbox

The following is displayed for every record:

- Title.
- The name of the user responsible for the record.
- Record type (can be identified by the icon).
- Sender, if the record has been sent.
- Attached documents, chats, notes, and annotations.
- Letter date, if the record has been sent.

Unread records are shown in bold.

Navigating the result lists

When F2 Touch is opened, there are a number of options for navigation, archiving, etc., in the result list. These options apply to all lists in F2 Touch.
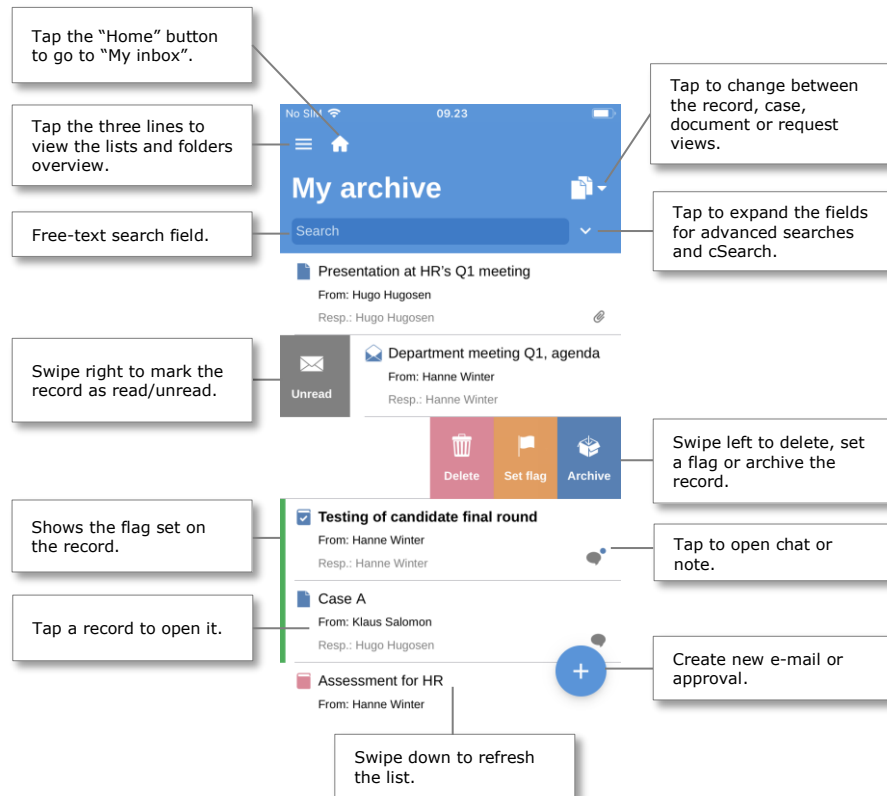
Figure 35: Navigation options for lists

## The record, case, document and approval views in the result list

By default, the inbox appears as a list of records. The inbox can also be displayed as a list of cases, documents or approvals. This will display the cases in which records in the inbox are included, the documents attached to the records, or the approvals in which the user is involved, respectively.
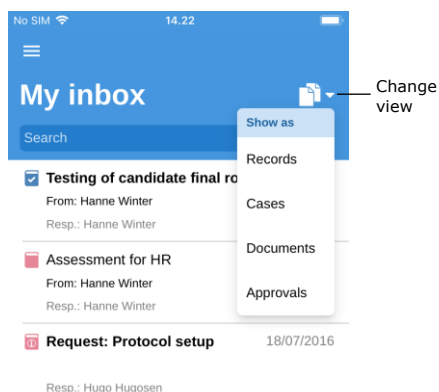
Figure 36: Change list view

Tap the **View mode** to switch between the different result list views: record (default view), case, document, and approval list view.

The list view determines the parameters by which items are sorted. Each set of parameters are a default for the given F2 installation.
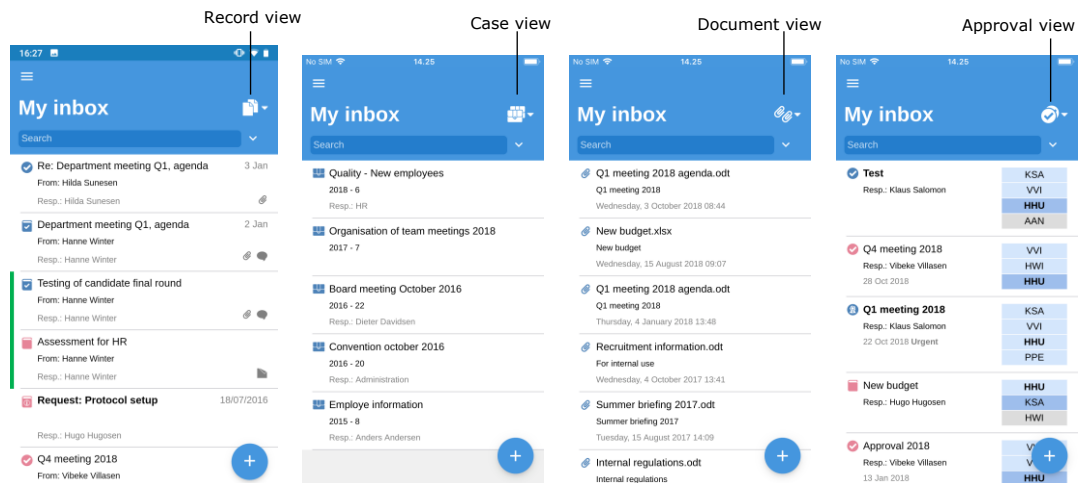
Figure 37: The four viewing options in the result list

## Limitation to the number of displayed unread records

The F2 Touch app icon displays the number of unread records. No more than 99 unread records are shown, which is identical to the behaviour of F2 Desktop.

Searches

The following section describes the search functions in F2 Touch. Searches are performed the same way in F2 Touch as in F2 Desktop.

Read more about performing searches in the user manual *F2 Desktop – Searches*.
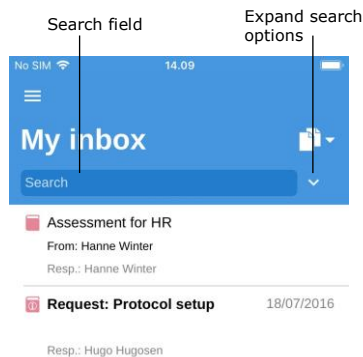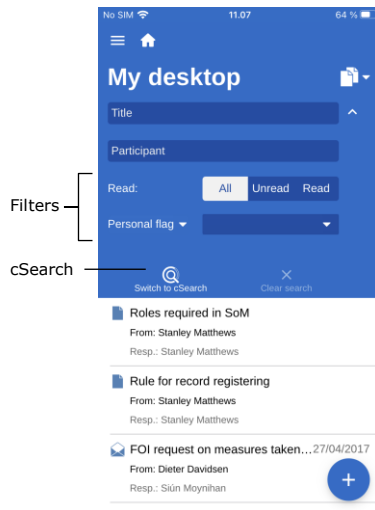

Figure 38: Search in a list

The user can search through a result list by using the search field located above the list.

The user can search for record and case titles in the search field. F2 Touch then finds the records whose title or the title of their attached case contain the search word.

Tap ⌄ to view other search options as well as sorting options.
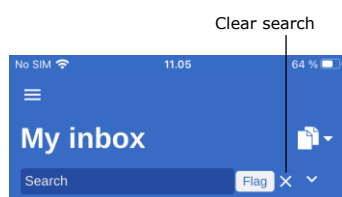

Figure 39: Expand search options

This allows the user to search for:

- **Title** or parts of words that appear in the record or case title.

- **Participant**, i.e. records containing certain participants or units from the participant register.

The list can be sorted using the following filters:

- **All/Unread/Read**

- **Personal flag**, which searches after records with the chosen flag.

Tap **cSearch** (add-on module) to search using this functionality. Read more about cSearch in the *F2 cSearch* section.

Figure 40: Search criteria

If the expanded search options are hidden while one or more are in use, any active search criteria are displayed next to the search field.

Clear the search by tapping **X**.

Sorting the search results

When records are searched for, they are sorted in chronological order so that the most recently updated record is at the top of the result list.

In the lists "My Archive", "My desktop", and "My inbox" along with "Inbox (Unit)", "Archive (Unit)" and "Desktop (Unit)", all actions related to a record affect its placement in the result list. For example, changes to visible chats on a record are considered updates, thus affecting the placement of the record in the result list.

Record search for a participant (user)

In F2 Touch it is possible to search for a specific participant from F2's participant register. When searching for a particular participant, all records with the participant as the responsible user, the sender, or the recipient are found.
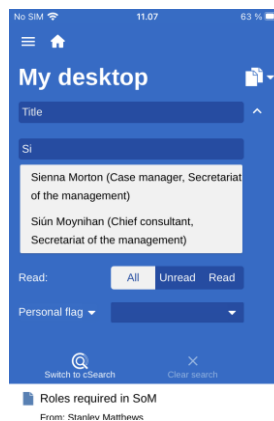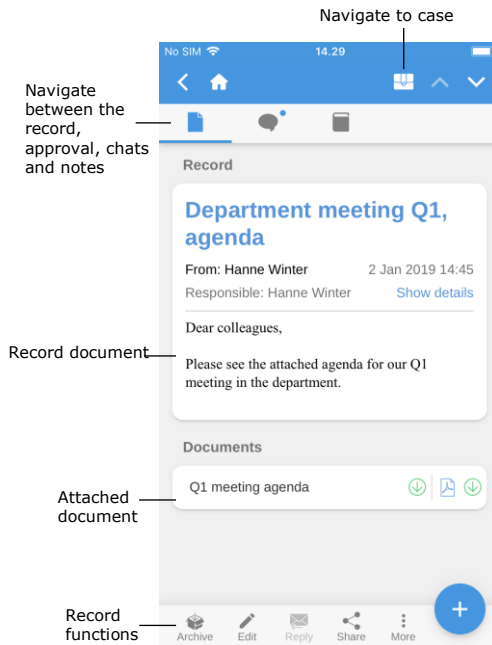

Figure 41: Search for a participant

In F2 Touch it is possible to search for records with deactivated participants. If the name of a deactivated participant is entered, it will be displayed in italics and greyed out.

Working with records in F2 Touch

The following section describes the different views and functions for records in F2 Touch.

Show record

Navigate to case

Navigate between the record, approval, chats and notes

Record document

Attached document

Record functions

Figure 42: The record view

Tap a record to open and work on the record document and any attached documents, chats, notes, etc.

If the record is attached to a case, the user can navigate to the case by tapping the case icon in the blue ribbon.

The user can navigate between the record document, chats and notes on the record using the menu items in the grey ribbon below the blue one. If the record contains an approval or a request, these are also displayed here.

The grey ribbon at the bottom contains a number of functions for working with the record.
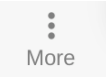
Functions on the record

At the bottom of the record view, there are a number of functions for working with the record.

Figure 43: Functions in the record view

The access rights for the record determine which functions are available for the user. The functions are described in the table below.

Icon	Menu item	Description
Archive	Archive	Archives the record.
Edit	Edit	Opens a sub-menu with the following options: • Edit record • Edit approval document (add-on module) • Edit approval (add-on module) • Change responsible • Set supplementary • Set keywords.
Reply	Reply	Opens a sub-menu with the following options: • Reply • Reply all • Forward.
Share	Share	Opens a sub-menu with the following options: • Copy link to this record • Email as PDF • Approval document as PDF (add-on module) • Generate combined PDF.
More	More	Opens a sub-menu with the following options: • Mark as unread • Delete record.

Tap ⊕ in order to perform the following actions on the record:

- New chat
- Chat all
- New note
- New approval (add-on module)
- New request (add-on module)
- New annotation.

Note: Menu items relating to approvals require the add-on module F2 Approvals. The new approval menu item is only visible if the user has the necessary rights to create an approval on the record.

## Show/hide details in the record view
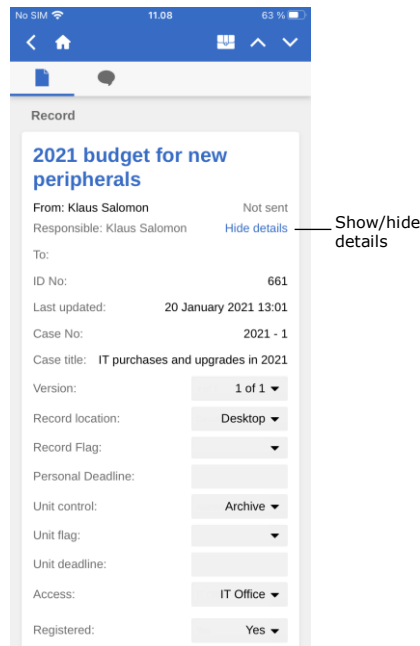
Figure 44: Show/hide details for the record's metadata

Tap **Show details** to view and edit the following metadata:

- Responsible
- Letter date
- To/From
- Record ID
- Last updated
- Version (see the note below)
- Record location
- Record flag
- Personal deadline
- Unit control
- Unit flag
- Unit deadline
- Access
- Registered.

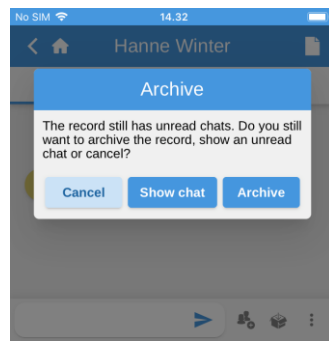> **Note**: It is not possible to make changes to older versions of the record as in F2 Desktop.

Archive record
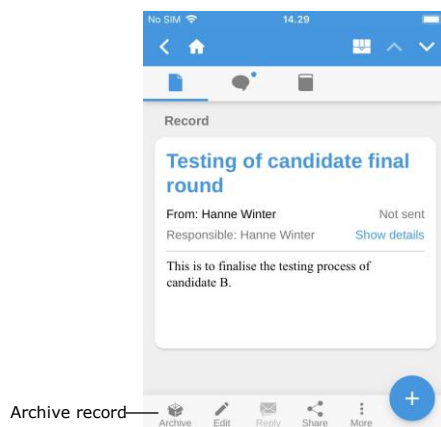
Figure 45: Archive record

In F2 Touch it is possible to archive a record directly from the record.

Tap **Archive** in the bottom left corner of the record to archive it as shown in the figure.

When the record has been archived the next record in the list is displayed.
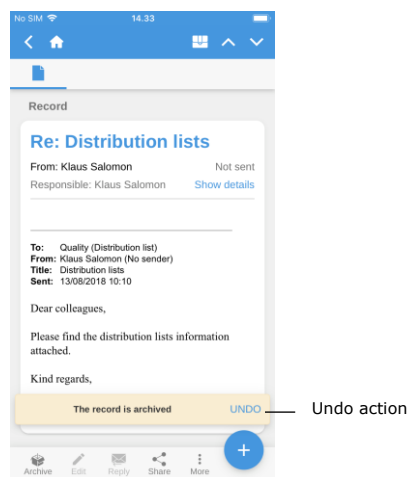
Figure 46: Archiving a record with unread chats

Tapping **Archive** 📦 on a record with unread chats will display the "Archive" dialogue. The figure to the left illustrates the dialogue.

In the dialogue F2 Touch presents the following options: to archive the record despite its unread chats, to show the chats, or to cancel the action.

Undo action

Figure 47: Undo "Archive record" action

In F2 Touch it is possible to undo certain actions on a record. An **UNDO** button appears at the bottom of the screen when the following actions are performed:

- Archive record.

- Delete record.

- Send record. Undoing will stop the record from being sent, but any changes to the record will be saved.

> **Note**: The "Undo" button is only available for a few seconds.

Allocate a flag by swiping

It is possible to allocate a flag to a
record directly from the result list using
a swipe action. Swipe left and the
options **Delete**, **Set flag** and **Archiv**e
will appear.

Select **Set flag** to display the available
flags at the bottom of the screen as
shown in the figure to the right.

Personal flags can be set on personal
lists, while unit flags can be set on unit
lists.
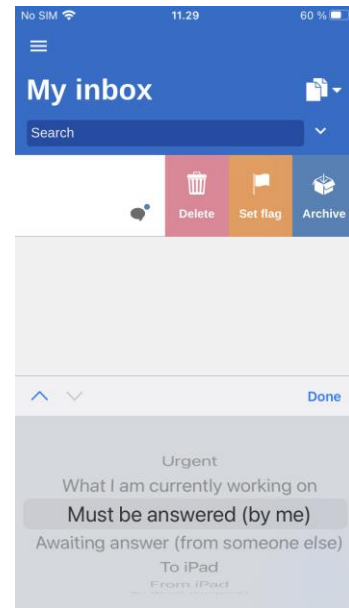
Figure 48: Allocate a flag directly from the result list

Include participant in access restriction

If a record is given restricted access through the "Access restricted to" or "Case
access restricted to" fields, an asterisk "*" appears in the "Access" field on the
record.
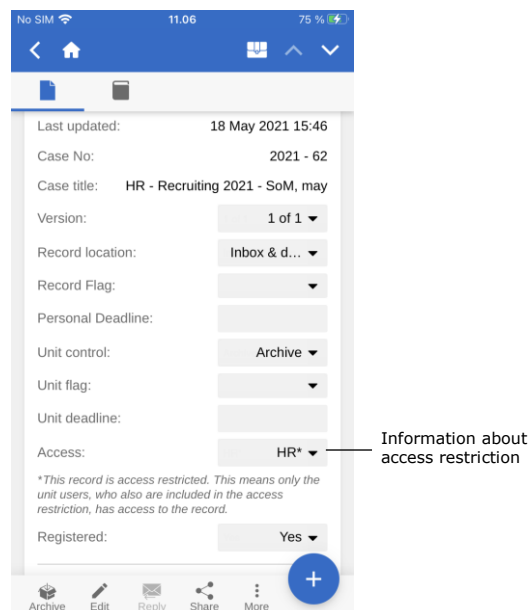
Figure 49: Information about access restriction

Internal participants can be given access to records that are access restricted.

It is possible to give a participant access to a record with an access restriction when performing the following actions:

- Send a chat
- Add chat participant
- Save a record
- Attach record to a case
- Send a record
- Approve an approval.

If a user attempts to share a record with an internal participant who does not have access to the record, F2 asks if the participant should be included in the record's access restriction.

In this dialogue it is possible to add participants to the access restriction. If the participant is not added, they will not be able to see the record or the chat.

For more information about access restriction in connection with records and cases, see *F2 Desktop – Records and Communication*.
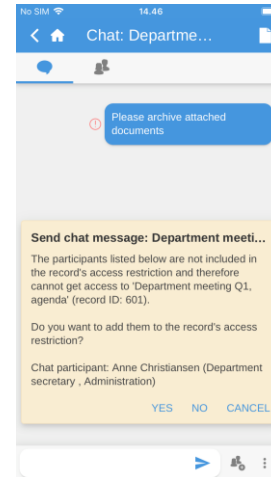
Figure 50: Include participant in the access restriction

Create e-mail or record

Records can be created from every list in F2 Touch. To create a new record, tap the

➕ icon in the bottom right corner and then **Create e-mail**. The menu item is named by its most regular use, as F2 Touch users often create records to send them as e-mails. If no recipient is added to the "To" field, the record is created as a regular record.

Give the new record a title and enter the recipient in the "To" field to send the record as an email. Read more about sending emails from F2 Touch in the *Send email* section.

Attachments can be added to the record using the **Add** function in the "Documents" section. Read more about adding attachments in the *Add document in F2 Touch* section.
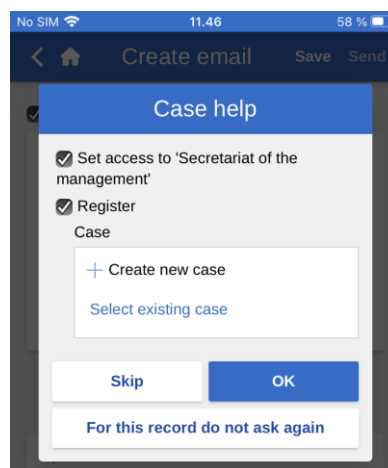
The record can be assigned an existing or a new case below the "Case" header.
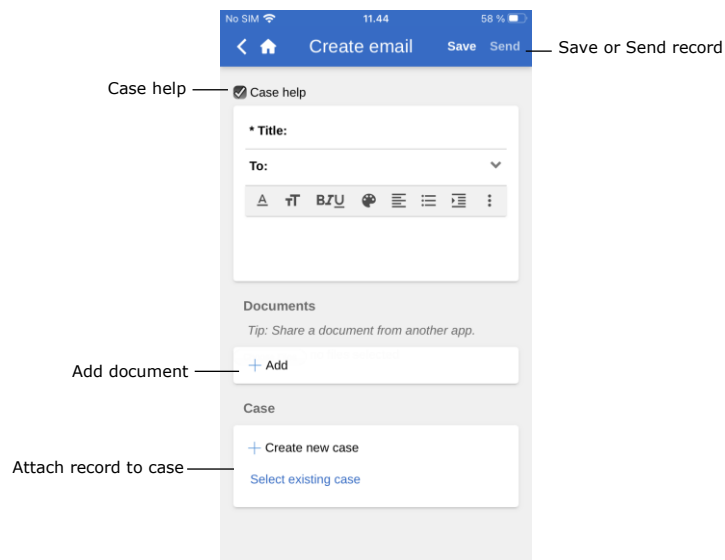
Figure 51: Create record

Tap **Save** or **Send** to save the record or send it as an email. If the "Case help" field is ticked the user must consider the case help dialogue before the record is saved or sent.
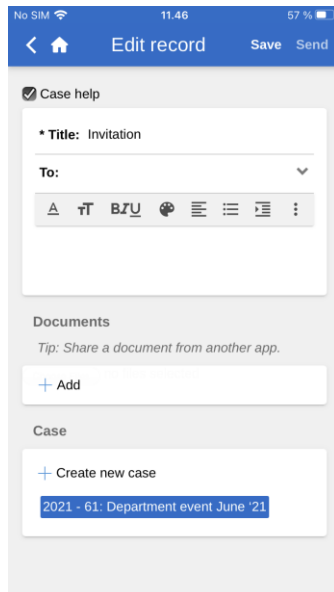

Figure 52: Case help

In F2 Touch, the case help functions and appears similar to the case help in F2 Desktop.

Read more about this function in *F2 Desktop – Records and Communication*.

Edit record

Figure 53: Edit record

Existing records can be edited in F2 Touch depending on the individual user's privileges.

Put a record in edit mode by tapping **Edit** [Edit] and then **Edit record**.

When the record is in edit mode, it is possible to edit the title, the record document, recipients (emails), attached documents, and associated cases.

When editing the record, it is also possible to edit its attached documents and to add or delete attachments. This is described in the following sections.

Furthermore, a document can be attached via other apps opened through F2 Touch. The document will be attached to the current record.

Add document in F2 Touch

In F2 Touch it is possible to upload an attachment of up to 40 MB. This may be a document or image from the mobile device's file system.

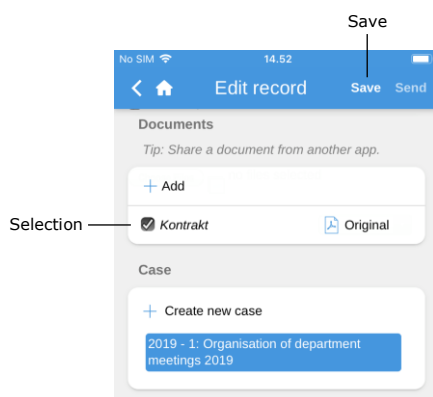> **Note:** This function is available in F2 Touch for iPhone, iPad or web browser.

Tap **Edit record** in the bottom grey ribbon to set the record in edit mode.
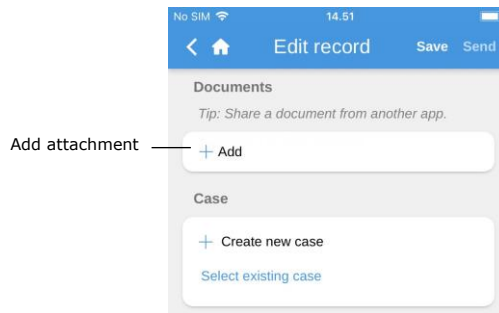
Figure 54: Add document
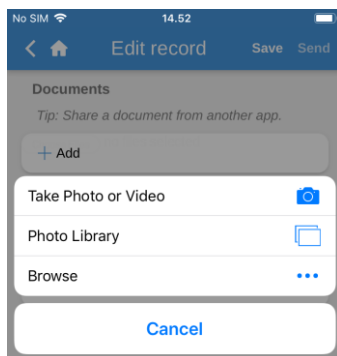
Figure 55: The file selector on an iPhone

Add attachment

Selection

Save

Figure 56: Save to add document

Tap **Add** under the "Documents" header to open the device's standard file selector.

The following options are available when using an iOS device:

- Take a photo or record video.

- Transfer one or more photos from the image library.

- Transfer a file from another app using the "Browse" feature. From here, the user can search all documents saved on the device.

Select a file from the device's system.

> **Note**: On an iPad, one or more files can be dragged and dropped from another app onto the "Add" button by using the Split View function.

To cancel the attachment process, simply deselect the file before tapping **Save**.

Tap **Save** to attach the chosen file to the record.

Edit document

In F2 Touch there are two ways to edit a document that is attached to a record:

- Select an existing file in the device's file system. If F2 Touch is accessed from a web browser, the existing document will be overwritten.
- Open the document in another app to edit, and then re-import the document to F2 Touch.

The two methods are described below.

Edit document by overwriting it with an existing file

> **Note:** This method applies only when accessing F2 Touch via a web browser.
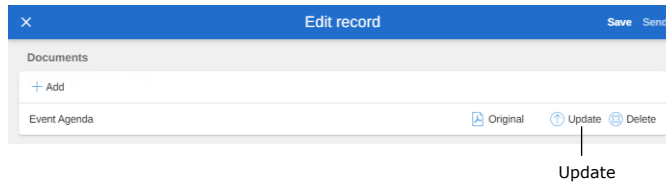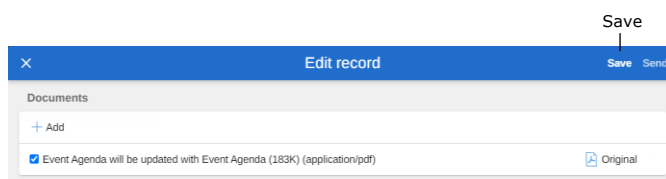

Figure 57: Edit document – Update

Tap **Edit record** in the bottom grey ribbon to enter edit mode.

Overwrite an attached document by tapping **Update** ⊕ in the "Documents" menu item.

This will open the unit's file system from which the user can find and select the desired file.


Figure 58: Edit document – Save

Once the file has been selected, tap **Save** to save it on the record. The new file will replace the existing attachment.

To cancel the replacement, deselect the file before tapping **Save**.

Edit document using an external app

> **Note:** This method applies when accessing F2 Touch via a mobile device such as iPhone, iPad or Android phones/tablets.

An attached document can be edited by exporting it to an external app, editing it, and then reimporting to F2 Touch.
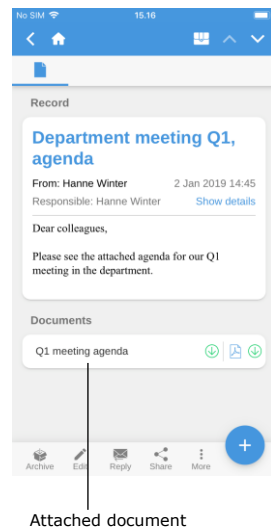
Open the attachment in F2 Touch by tapping on the document's title. The record must be in read-only mode.

**Figure 59: Attached document on a record in read-only mode.**
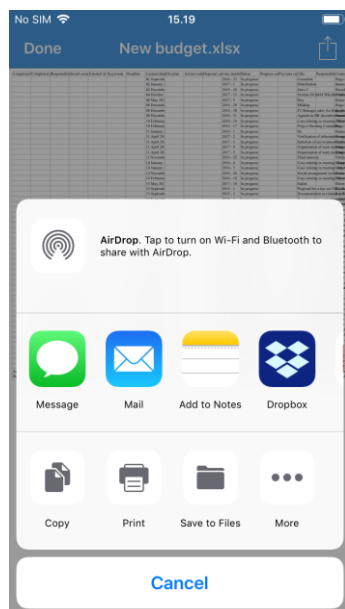
With the document open in F2 Touch, tap **Document interaction** to open it in an external app:

- Tap ⬆️ on an Apple iOS device.

- Tap ⬍ on an Android device.

Figure 60: Document interactions on iPhone

Edit the document in the selected app. When the editing is done, the document must be saved and sent back to F2 Touch. This is done in the following way:
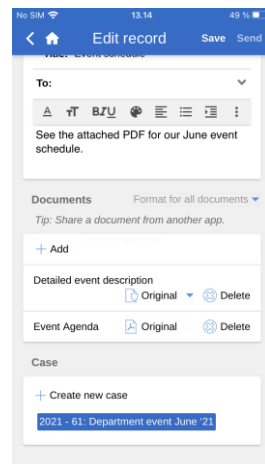
Figure 61: Record in editing mode

Open F2 Touch. Select the record to which the document will be attached. Tap **Edit record** on the grey ribbon at the bottom of the record to enter editing mode.

Select "Copy to F2 Touch"

Figure 62: Copy to F2 Touch via Document interaction

Open the external app used to edit the document. Tap **Document interaction** in the app:

- Tap ⬆️ on an Apple iOS device.
- Tap ◀️ on an Android device.

Select **Copy to F2 Touch** to send the document back to F2 Touch.

Figure 63: Document added from external app
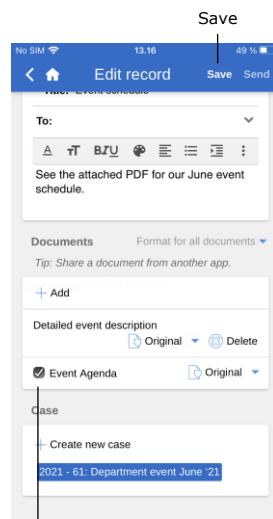
The document is added as a new attachment. It is not possible to keep both versions of the document, but it is possible to cancel the action by removing the tick in the box next to the document's title.

Tap **Save** to complete.

The document is then updated.

> **Note:** Documents attached to a record in F2 are displayed without an F2 ID when opened in F2 Touch in a PC browser. The document's title is displayed instead. In the F2 Touch app, attached documents are displayed with both title and F2 ID, making it possible on a mobile device to open an attached document from F2 in another app and save it to the same record in F2 again.

Selecting the format of documents

It is possible to select the format of a document that is attached to a record. Selecting a document format applies only when records are sent as external emails. For records that are shared internally in an F2 authority (including internal emails), the document retains its original format.

Figure 64: Format selector
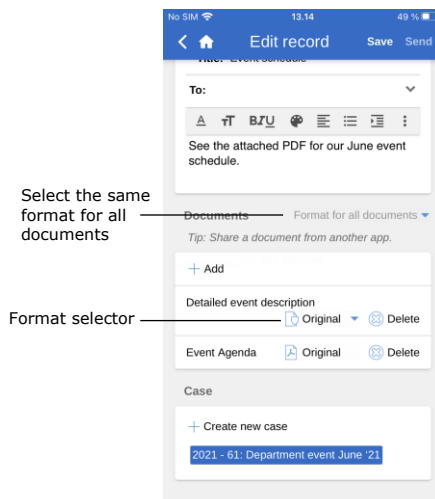
Set the record in edit mode. The document format can be selected next to the attached documents under "Documents". It is both possible to choose the format for all documents attached to the record or for each document.

Select one of the two options to display a drop-down menu at the bottom of the screen. Here it is possible to select the wanted format. See the figure below.
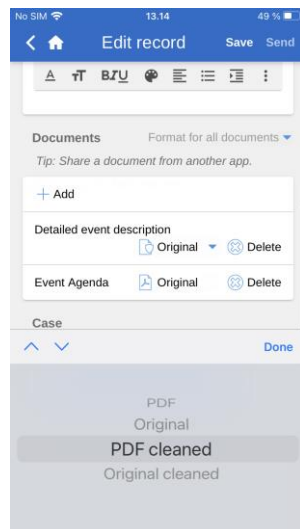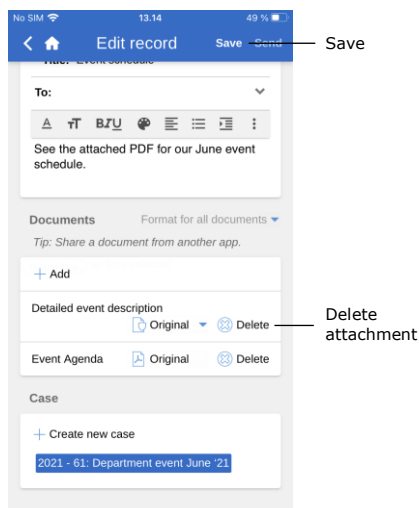
Figure 65: Select format

It is possible to choose between the following formats:

- PDF

- Original

- PDF cleaned (only available with the F2 Metadata Remover add-on module)

- Original cleaned (only available with the F2 Metadata Remover add-on module).

The F2 Touch standard format is the one the user has selected in their individual setup in F2 Desktop.
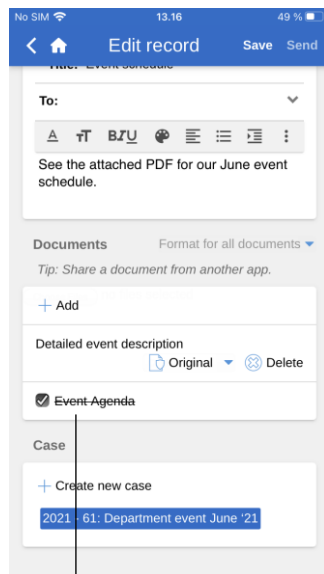
Delete document

Figure 66: Delete document

If an attached document must be deleted from a record, it can be done in the following way.

Switch to edit mode. Tap **Delete** ⊗ next to the attached document as displayed in the figure to the left. The document will then be deleted after tapping **Save**.

The title is crossed out

Figure 67: A deleted document

A deleted document will be crossed out as shown in the figure to the left.

Communication options on the record

Navigate to chats, notes, requests, and annotations

Figure 68: Communicating on the record
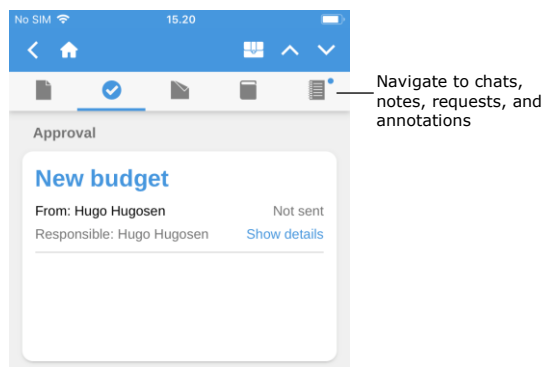
If a record has any attached chats, requests, notes, or annotations, the communication channel's icon is displayed on the upper grey ribbon.

Tap an icon, e.g. the chat icon 💬, to quickly navigate to the record's chats. The same applies for requests, notes and annotations.

A little blue dot next to an icon indicates an unread chat, request, note, or annotation on the record. For example, a 📑 indicates an unread request.

If a record contains an unread chat, note, request, or annotation, its title is marked in bold until the record is opened. If a record contains unread chats, notes requests, or annotations, the chat will usually be shown first. Then follows notes, requests, and finally annotations.

Send email

Send

Figure 69: Sending an email record
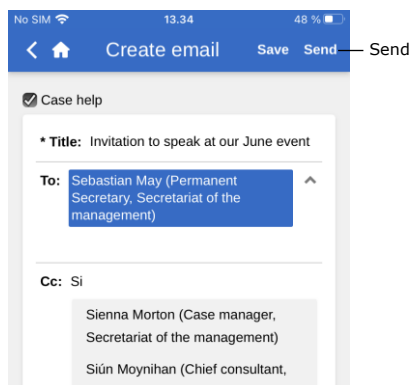
Enter the recipients in the "To" field and, as in F2 Desktop, F2 Touch searches for participants that match the entered data in the participant register. The same applies to the "Cc" and "Xbc" fields.

The "Send" button appears when a participant has been entered in the "To" field.

Tap **Send** to send the record as an email.
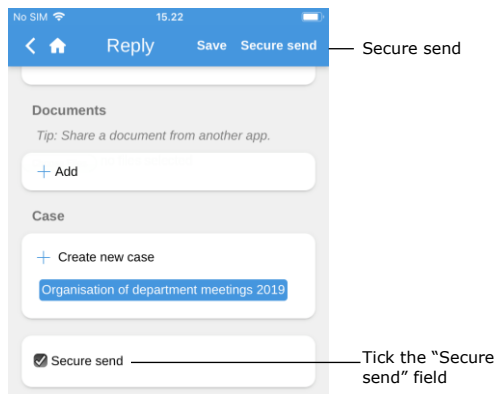
Figure 70: Secure send

In F2 Touch it is also possible to use the "Secure send" function (add-on module).

"Secure send" activates the relevant software in Microsoft Exchange that encrypts emails sent from F2.

To send securely, tick the "Secure send" box at the bottom of the record. The "Secure send" box is only visible when a participant has been entered in the "To" field.

"Secure send" functions the same way in F2 Touch as in F2 Desktop. For more information, see *F2 Desktop – Records and Communication.*

Email address links create new email records

Tapping a link to an email address in a record document creates a new record. The new record has the relevant email listed as recipient in the "To" field.
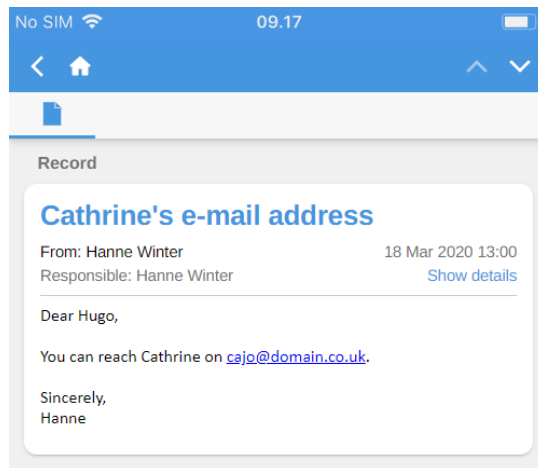
Figure 71: An email address in the record document
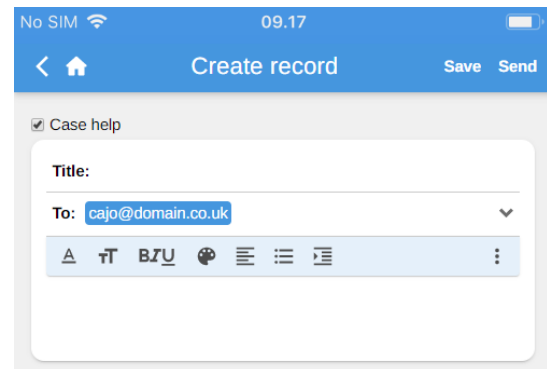
Figure 72: A new email record with the email address as recipient

Communication on the record

It is possible to add chats, notes, requests, and annotations to records by tapping **Add** ⊕ when a record is open. Requests are described in the *F2 Request* section, while the other communication options are described below.

Create new chat

Tap **New chat** to open the chat window. Tap **Chat all** to add all email related participants to a new chat, i.e. sender, recipient(s), and any Cc and Xbc recipients.
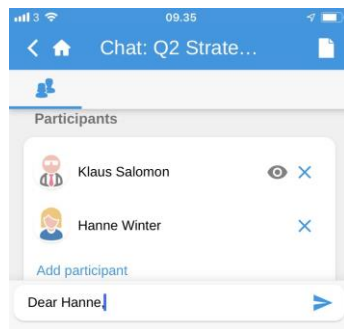
Figure 73: New chat conversation

Add recipients with the "Participants" field. When a name is entered in the field, F2 Touch searches for participants who match the entered data in the participant register. This is the same procedure as when using F2 Desktop.

Enter a message in the text field below. Tap ➤ to send the message.
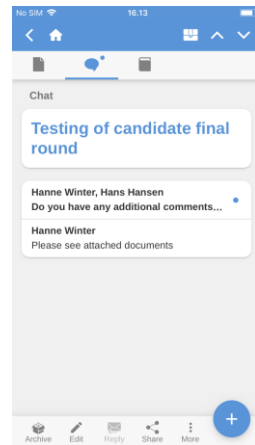
Figure 74: Chat overview

Access chats by navigating to the chat message overview or by using the chat icon 💬 next to a record in the result list.

If a chat is unread or new messages in the chat have appeared, the chat icon will appear with a little blue dot 💬.

Chats with more than two participants show the number of participants and their initials in the title.
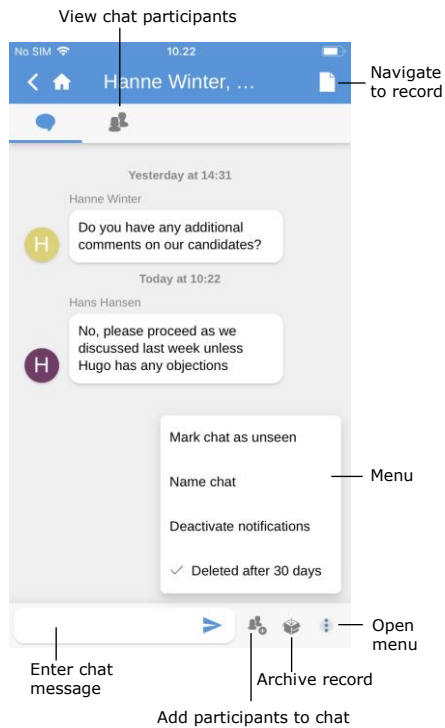
Figure 75: Chat window

There are a number of functions available in the chat window.

Navigate between the chat participants overview and the conversation in the top ribbon.

The bottom ribbon contains the following functions:

- Enter chat message
- Add participants to chat
- Archive record
- Menu

Tap the menu ⋮ to access the following options:

- Mark chat as unseen
- Name chat/Edit chat title
- Toggle notifications
- Toggle automatic deletion (if configured).

Read more about chat functions and available configurations in *F2 Desktop – Records and Communication*.
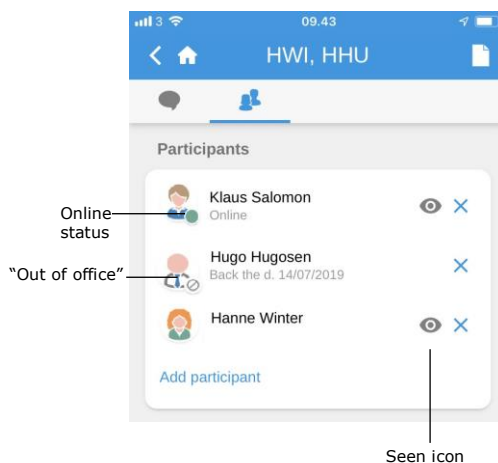
Figure 76: The participant tab on chats and notes

The participant tab on both chats and notes shows the participants' images, whether the latest message has been seen, and the participants' online status and "Out of office" message.

Create new note

Tap **New note** to add a note to the record and open the note window.
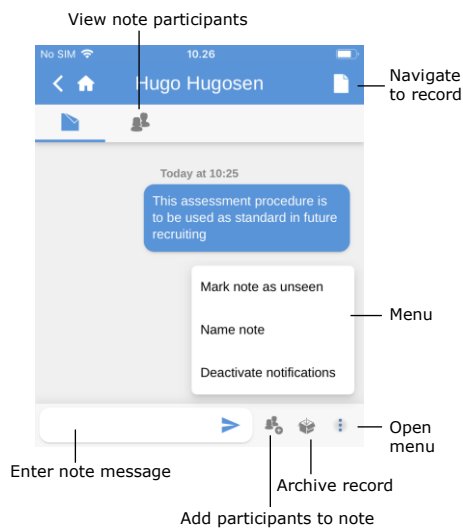
Figure 77: Note

In the top ribbon the user can navigate between viewing the note participants and the note text.

The bottom ribbon contains the following functions:

- Enter note text
- Add note participants
- Archive record
- Menu

Tap the menu for the following options:

- Mark note as unseen
- Name note/Edit note title
- Toggle notifications.

Read more about note functions in *F2 Desktop – Records and Communication*.
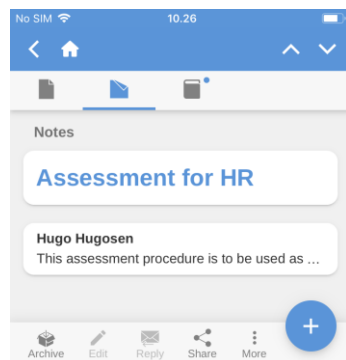
Figure 78: Notes overview

Access the note by navigating to the notes overview or by using the note icon next to a record in the result list.

If a note is unread or new messages in the note have appeared, a small blue dot appears with the note icon.
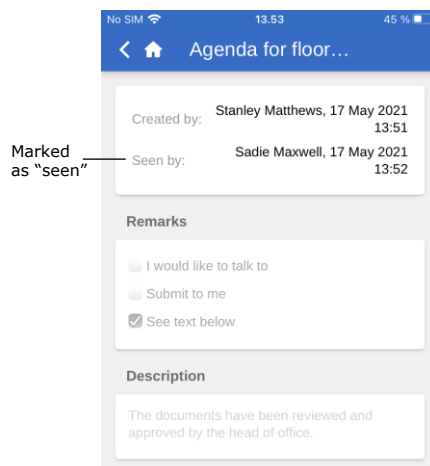
Create new annotation

Tap **New annotation** to create a new annotation and open the annotation window.
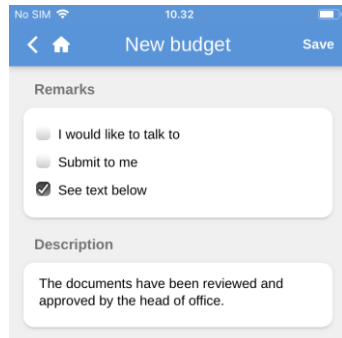
Figure 79: New annotation

Similarly to F2 Desktop, it is possible to select an annotation type and add a description when creating an annotation.

Save the annotation by tapping **Save** in the upper right corner. It will then be visible on the record.

Figure 80: "Seen" annotation

On the record, annotations can be accessed in the "Annotations" field.

Here an annotation must be marked as "Seen" before a case can be completed. This functionality is the same as in F2 Desktop.
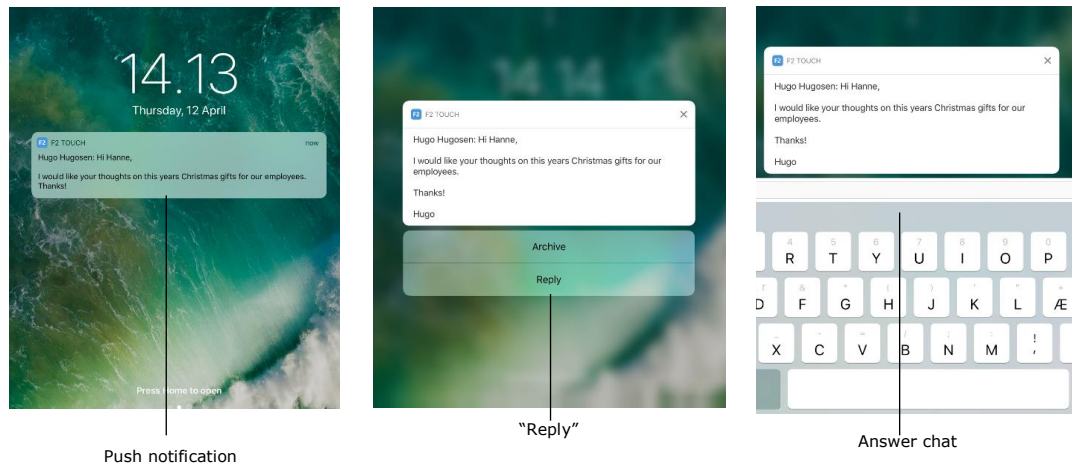
Push notifications

It is possible to answer a chat or archive an email or a record with a chat directly from a push notification on both iOS and Android.

When a chat push notification appears on a locked screen, it is possible to use a "3D Touch" on the push notification. A 3D Touch is performed by placing a finger on the notification and keeping it there for a few seconds. It is also possible to swipe right and tap on **Show**. This opens the "Archive" and "Reply" shortcuts. An example of this can be seen in the figure below.

> **Note**: The exact method of opening a push notification depends on the device's operating system.

Tap **Reply** to write an answer directly without opening F2 Touch. Tap **Send** and unlock the device to send the reply.

| Push notification | "Reply" | Answer chat |

Figure 81: Push notification – Chat

This procedure also applies to receiving and answering an email via push notification.

The only difference is that F2 Touch will open a "Reply" dialogue when tapping **Reply** on an email, as shown in the figure below.

Tap **Send** to send the email reply. To archive an incoming email record or a record with a chat, tap **Archive**.

| Push notification | "Reply" | Answer email |
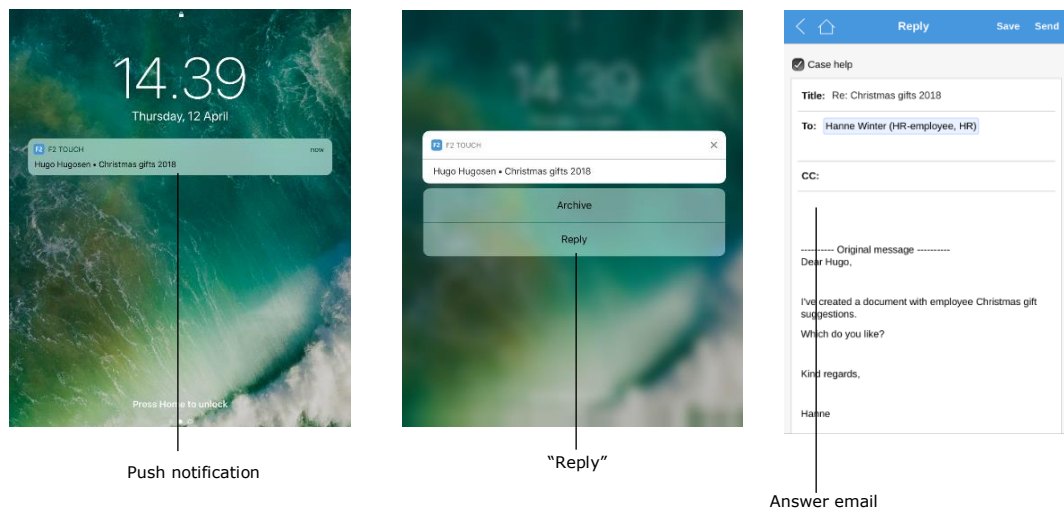
Figure 82: Push notification – Email

Working with cases in F2 Touch

In F2 Touch it is possible to navigate between the different records on a case as well as adding a record to an existing case.
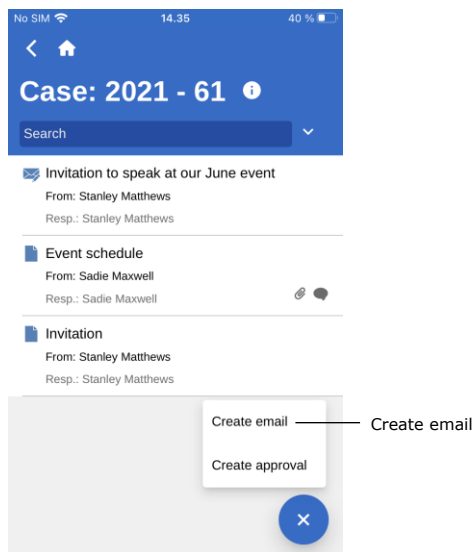
A case icon is shown in the blue ribbon if the record is attached to a case.

Tap **Case** to view the case along with a list of its associated records.
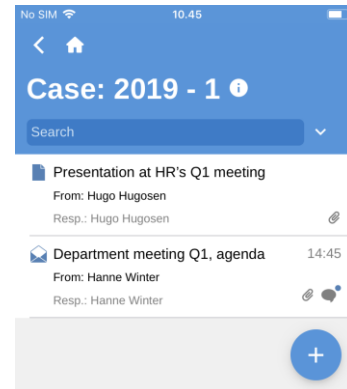
**Figure 83: The case record's view**

Attach a new record to a case

Figure 84: Create new record on a case

It is possible to create a new record and add it to an existing case using F2 Touch. To do this, open the relevant case, tap **Add** , and then **Create email**.
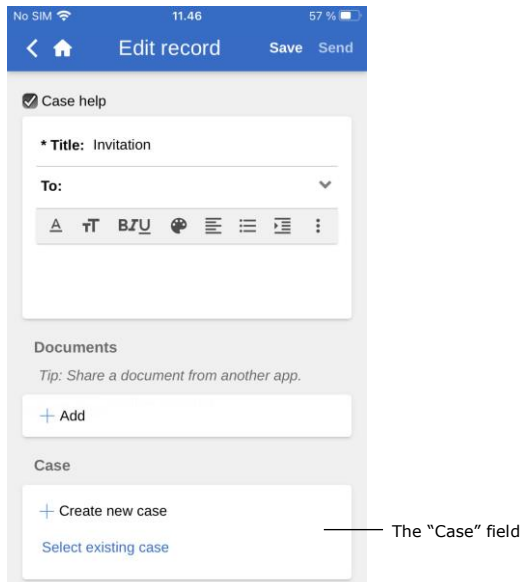
> **Note**: The **Create email** function is used for creating both emails and records. If no recipient is added in the "To" field, F2 creates a regular record.
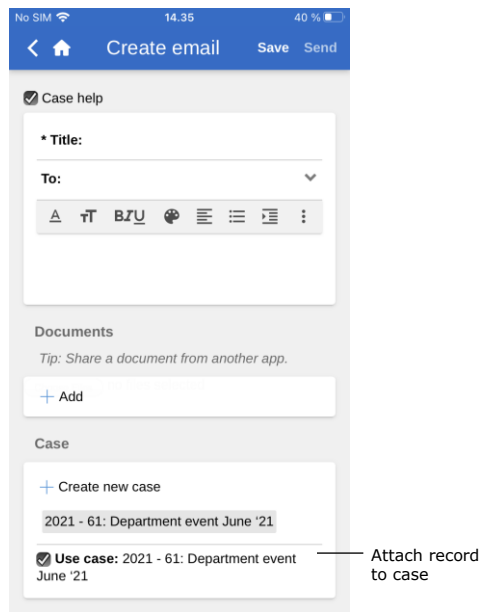
At the bottom of the newly created record is the "Use case" tick box as shown to the left. Tick **Use case**, and the newly created record will be added to the case.
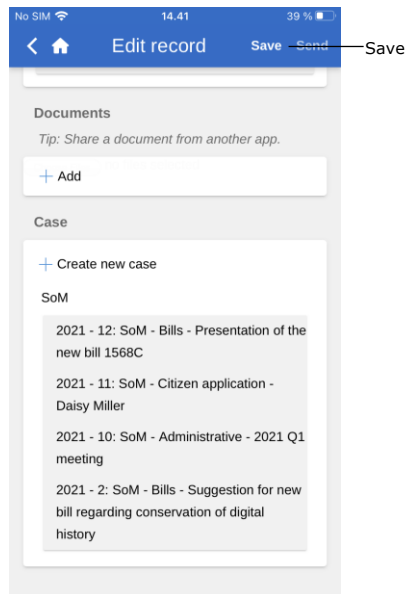
Figure 85: Attach a new record to a case

Attach existing record to case

An existing record can be attached to a case by opening the record and entering editing mode.

Enter edit mode on a record by tapping **Edit** and then **Edit record** in the grey ribbon at the bottom of the record.

Figure 86: The "Case" field on a record

Figure 87: Case search result list

To attach the record to a case, go to the "Case" field and search for a case by tapping the field and entering a search word.
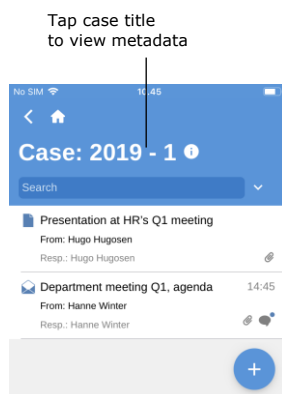
F2 Touch then suggests cases that match the entered words, as shown in the figure to the left.

In the list of search results, tap on a case to select it.

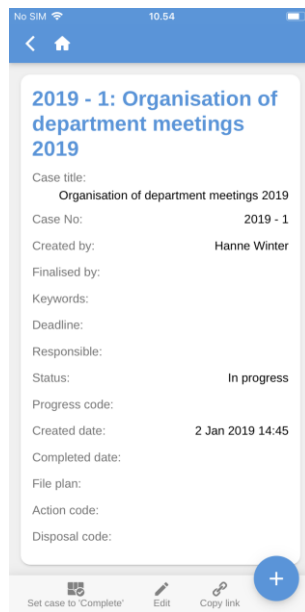Then tap **Save** to attach the record to the selected case.

The case metadata

Figure 88: View the case's metadata

A case's metadata can be accessed directly from the case. Tap the case title in the blue ribbon to view its metadata.
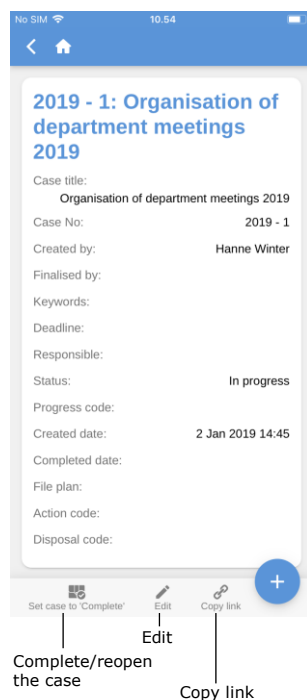
Figure 89: View the case's metadata

The following is displayed in the case metadata:

- Case title
- Case number
- Information about the creation of the case (case creator and creation date)
- Information about the completion of the case (case completer and completion date)
- The case's keywords, if one or more keywords are attached
- Deadline
- The user or unit responsible for the case
- The case's status
- The case's progress code
- The case's file plan, action code and disposal code

For iPads and Android tablets, the case's metadata is displayed on the same screen as its records.

Edit the case metadata

Figure 90: The case metadata

It is possible to edit the case metadata directly in F2 Touch.

Go the case's metadata and tap **Edit** in the bottom grey ribbon. Changes to the metadata are saved by tapping **Save**.

From the grey ribbon, a case can also be closed or reopened, and a link to the case can be copied. The link is copied to the unit's clipboard and can be inserted as a reference to the case either in F2 or in another programme.
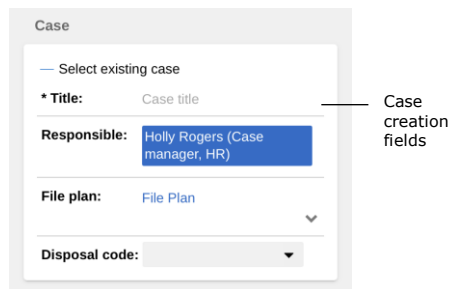
Create new case

Figure 91: The "Case" field on a record

A new case can be created using a record. This can be done using both a newly created record or an already existing record.

Either open an existing record and enter editing mode by tapping **Edit** and then **Edit record**, or create a new record by tapping **Create record**.

In either case, scroll down to the "Case" field.

To create a new case, tap the **plus sign** in the case field. This opens a number of fields for case creation.

Figure 92: Create a new case

Fill in the case fields and tap **Save** to create the case.

Note: Some fields may be mandatory depending on F2's setup and the organisation's internal guidelines. Some fields may be already filled in. Which fields that are mandatory in the "New case" dialogue may differ. The fields for creating a new case are identical to those of F2 Desktop.

Offline functionality in F2 Touch

Using F2 Touch it is possible to access and manage records even when offline in F2. This facilitates work in the case of Internet connectivity issues. The offline functionality is available in the F2 Touch app, but not through a web browser.

By default, F2 Touch shows the top 99 records in "My inbox" even when offline. In all other lists, F2 Touch shows the top 25 records as long as the list was previously opened while connected to the Internet.

If a record is accessed from a different list than "My inbox", e.g. "My desktop", it must have been opened while online in order to be accessed and managed offline in F2 Touch.

In F2 Touch it is possible to perform the following record actions offline:

- Create, save, and send records.
- Edit the record's metadata (update personal and unit control, flag, deadline, registered, and access control).
- Mark records as unread.
- Archive records.
- Delete records.
- Search for users in own authority as well as external participants on locally saved records. This makes it possible to answer emails while offline.

It is also possible to perform all actions related to chats and make use of the case help while offline.
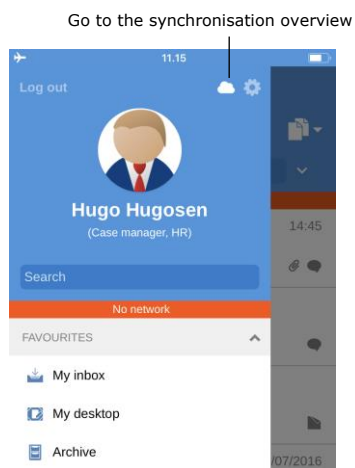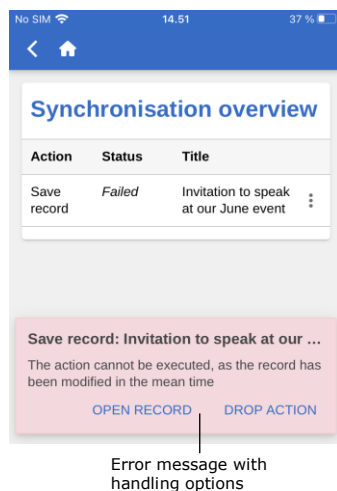

Figure 93: Go to the synchronisation overview

Actions that are performed offline in F2 Touch are automatically placed in a queue on the device and can be viewed in the synchronisation overview. Tap the cloud icon above the list view to view the queue.

This is a list of actions waiting to synchronise as displayed below.
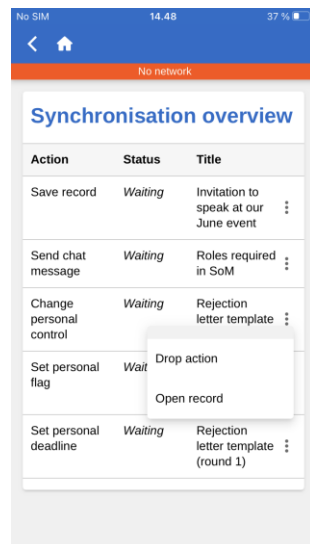
Figure 94: The synchronisation overview showing queued actions

When F2 Touch is back online it automatically updates the actions that were performed while offline.

If multiple actions have been performed on a record while offline, they will be updated in the order they were performed.

If actions have been performed on more than one record, they will be updated simultaneously when F2 Touch is back online.

Tap **menu** ⋮ next to a record to cancel the action or open the record.

Error message with handling options

Figure 95: A failed action on a record

If an action related to a record fails due to e.g. a server or synchronisation error, the user must decide how F2 Touch proceeds.

F2 Touch informs the user why the action failed and depending on the error will suggest possible further actions.

Failed actions are managed directly from the overview. Tap the wanted action and it will be performed instantly.

The error handling options include:

- **Cancel action** (applies to all actions).

- **Open record** (applies to all actions when the record is not open).

- **Try again** (in case access is lost or server error).

- **Perform anyway** (in case of synchronisation error in connection with personal control).

- **Show offline record** (when editing a record, F2 shows the local version saved offline).

- **Open record for editing** (when editing record fails due to server error).

- **Create draft record** (when editing record).

Note: When multiple actions are performed on the same record and one fails, all subsequent actions on the record will also fail.

Offline actions with the "Unknown" status

If an offline action such as "Send record" or "Send chat" are not synchronised with F2, the record in question receives the "Unknown" status. Critical actions such as these are shown at the bottom of F2 Touch in the same way as failed actions. The user must decide what to do with an "Unknown" record. The following actions are possible:

- **Open record** to see if the action in question has been performed.
- **Try again** to attempt to perform the action again.
- **Cancel action** to cancel any changes.

F2 Touch Light

F2 Touch Light is a configuration that provides limited access to data in F2 Touch while connected to an unsecured network. A user can only access and view records in "My Archive".

F2 Touch Light is set up in cooperation with cBrain.

With F2 Touch Light set up, a user has access to cases but can only see records on a case if they are located in "My archive".

A user can access their lists as in F2 Touch, but only the records located in the user's archive will be displayed.
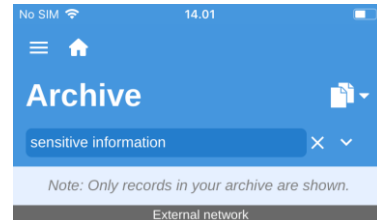
Figure 96: Notification shown in lists that are not based on "My archive" searches

For lists based on personal searches in the "Archive", a notification is shown at the top reminding the user that only the records in the user's archive are displayed.

The notification does not appear on lists based on personal searches in "My Archive".

The purpose of F2 Touch Light is to ensure that unauthorised persons do not have access to the organisation's data (i.e. the "Archive") if a user loses their phone.

It is possible to set up automatic activation of F2 Touch Light when a user switches from an organisation's network to an external or unsecured network.

F2 Touch Light affects use of the following add-on modules in the described way:

- **F2 cSearch**:

  Can only be used to search for records located in the user's archive. It is not possible to search for cases.

- **F2 Manager**:

  Cannot be accessed from F2 Touch Light.

- **F2 Management Cabinets:**

  Cannot be accessed from F2 Touch Light.

Using add-on modules in F2 Touch

The four sections below describe how certain add-on modules function in F2 Touch:

- F2 Request
- F2 Approvals
- F2 cSearch
- F2 Manager

The described functionality is only available if the relevant module has been purchased.

F2 Request

There are three types of requests:

- The internal request, which is a formal request to a user or unit to perform a task within the organisation.
- A group request, which is a request to a user or unit to perform a task, sent from one authority to another within the same F2 installation.
- An external request, which is a request to perform a task from one F2 installation to a user or unit in another F2 installation.

Read more about the different types of requests in the user manuals *F2 Request, F2 Group Request*, and *F2 External Request*.
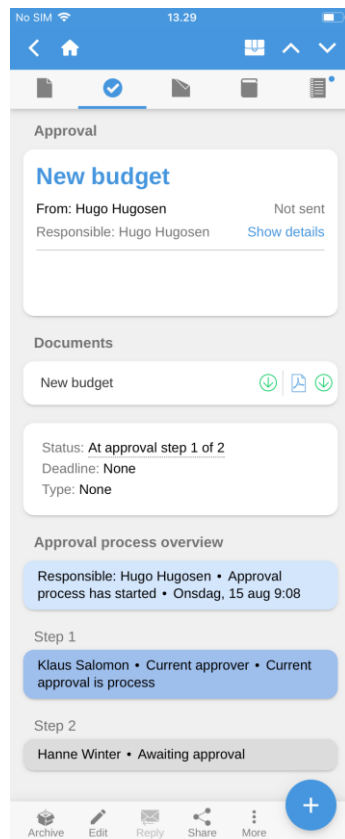
Create and manage internal requests
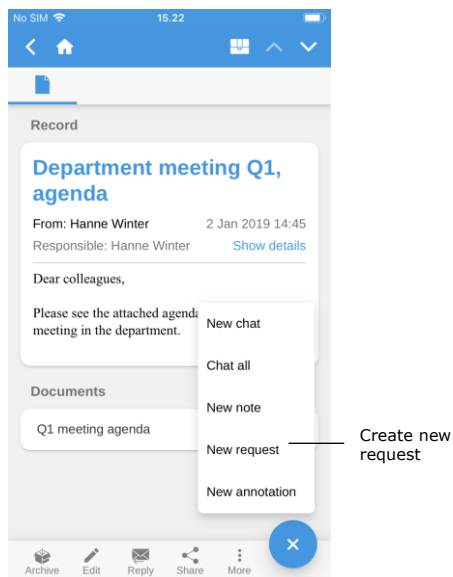
A new request is created from a record. Tap **Add** ⊕ and then **New request**.

Figure 97: Create new request

When creating a request, the user must enter certain request metadata along with the request's recipient. This procedure is the same as when creating requests in F2 Desktop.
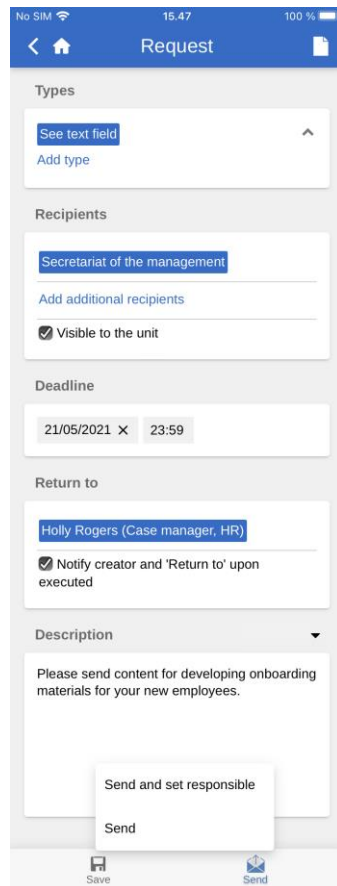
Figure 98: Newly created request

When a user receives a record with a request on it, it is placed in the user's inbox with the request icon ▉. The request is accessed through the record. The request can also be accessed from the answer record that is created when a request recipient formally initiates the execution of the request.

> **Note:** In F2 Touch, the answer record is always attached in a format predetermined in F2 Desktop. This means that the format cannot be changed in F2 Touch.
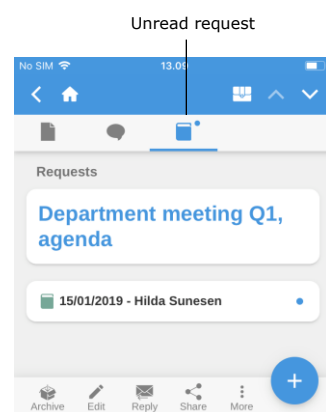
Figure 99: A request on a record

Open the record with the request and tap the request icon ▉, as shown in the figure to the left.

This opens the request, as shown in the figure below.

A reply to a request received in F2 Touch is created, processed and completed in the same manner as in F2 Desktop.
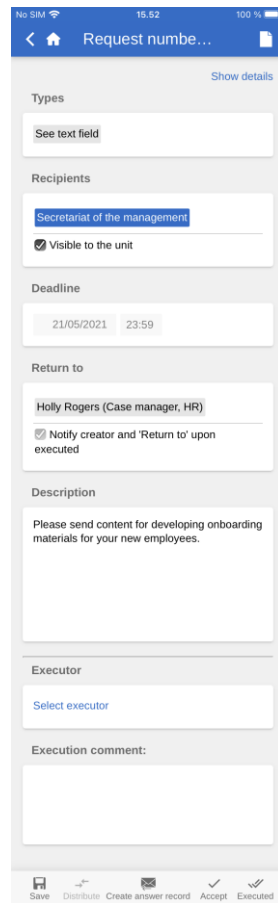
Figure 100: A request

Group requests appear in both the recipient's personal inbox and the unit's inbox. In F2 Touch it is possible to open the request on the record and view all related details, but it cannot be edited.

External requests appear in the unit's inbox only. Contrary to group requests, it is not possible to open or view details for external requests when using F2 Touch. However, the external request is still visible on the record under "Requests".

Show request history
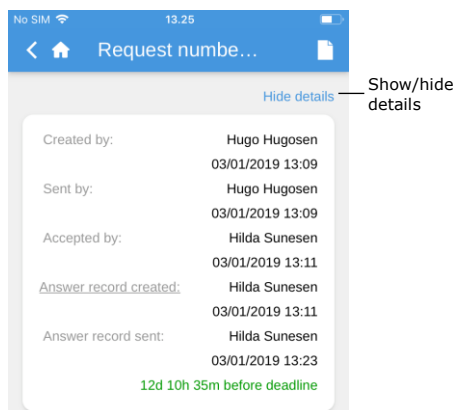
Figure 101: The request history

To gain an overview of the request's history tap **Show details** as shown to the left. An overview is then displayed with information about all activities related to the request. This may be the request creator, the user who accepted it, creation time for an answer record, etc.

Read more about the different types of requests in the user manuals *F2 Request*, *F2 Group Request*, and *F2 External Request*.

F2 Approvals

F2 Approvals meets the need to execute formal approvals of produced materials. Approvals can be accessed from the list view.
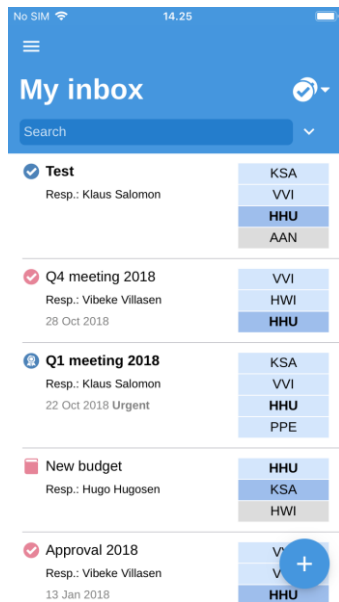
Figure 102: A list of records in an approval flow

Tap the **list view mode** and then **Approvals** to view a list containing all the records in an active approval flow. The list will only contain approvals that the user has permission to view.

Show approval

Figure 103: The approval view

Switch to the approval view by tapping the **approval icon** located in the record's grey ribbon.

The approval flow is displayed under the "Approval process overview" header. An approval can be processed if it is located with one of the following:

- A user who has been appointed as approver.
- A user with "on behalf of" rights.
- A copy recipient.
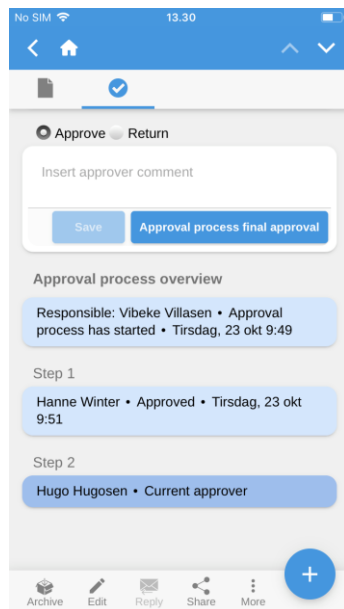
Figure 104: Processing the approval as an approver
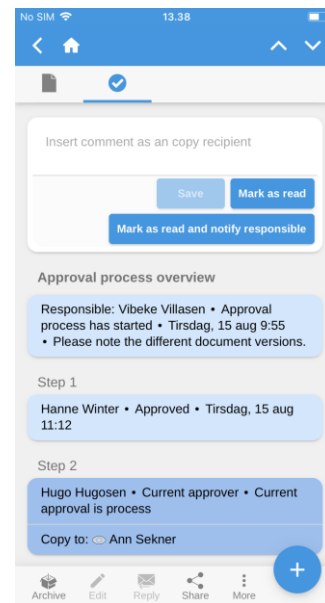
Figure 105: Processing the approval as a copy recipient

An approver can approve or return the approval with or without a comment.

A copy recipient can mark the approval as "seen" and has the options of notifying the responsible user and adding a comment.

An approval is returned as in F2 Desktop.

When returning, it is possible to select to which user the approval returns and with which user the approval resumes.
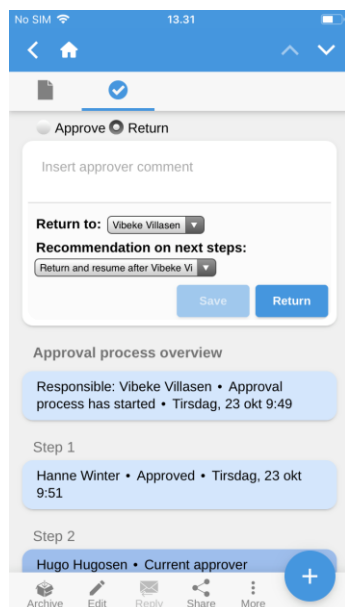
Figure 106: Returning an approval

Create and edit approvals

It is possible to create, start and edit approvals in F2 Touch. The options for creating and editing approvals are dependent on the configuration settings. Configurations are performed in cooperation with cBrain.

The following is possible by default:

- Approvals can be created on existing records using a template.
- Approvers and copy recipients can be edited on every step.
- Approval steps can be deleted.

The individual functions are described in the following section.

Create new approval

It is possible to create a new approval using existing templates in F2 Touch.

The templates are created and maintained in F2 Desktop.

An approval can be started in F2 Touch.

Options available to a user when creating approvals with or without an approval document can be configured. Any configurations are performed in cooperation with cBrain.
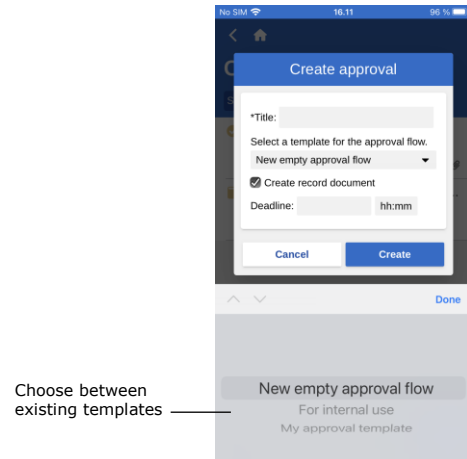
Figure 107: Create a new approval using a template

Edit approval

Approvals can be edited in F2 Touch. The following actions are available:

- Add step.

- Edit the approval deadline.

- Select type from the drop-down menu.

- Delete step.

- Add or remove approver or copy recipient.

- Edit other metadata fields, e.g. "Limited visibility", "Notify approver", etc.

The following actions are not possible in F2 Touch:

- Edit deadlines for individual steps.

Tap **Show advanced/Hide advanced** to toggle the options for editing.

It is only possible to edit steps that the approval has not yet reached.
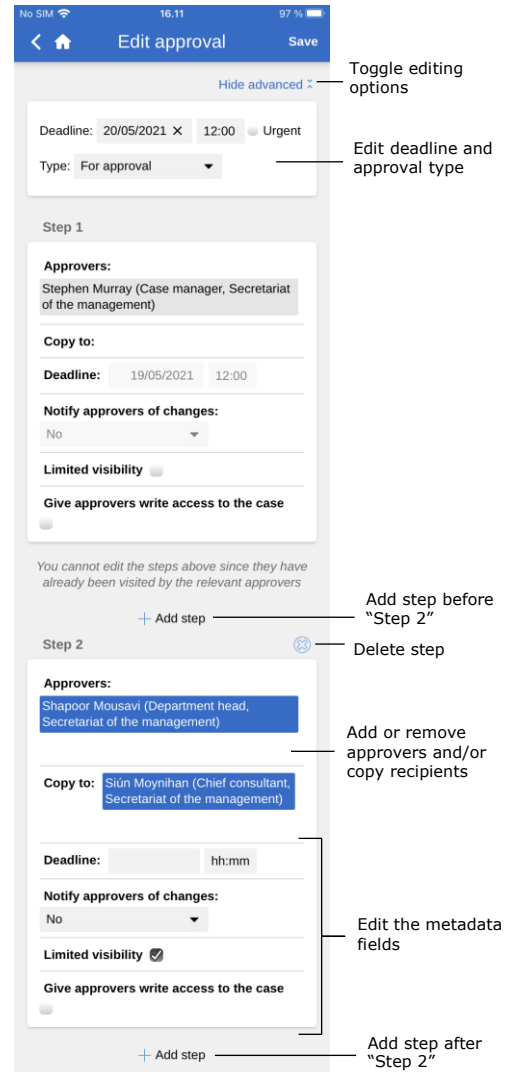
Figure 108: Edit approval

Offline approval actions

It is possible to perform a number of actions in F2 Approvals when F2 Touch is offline:

- Processing/saving/approving approvals.

- "Seen" marking of approvals as a copy recipient.

- Editing an approval document.

For more information on these functions, see *F2 Approvals – User manual*.

F2 cSearch

F2 cSearch enables a quick free text search across all data in F2 to which the user has access.
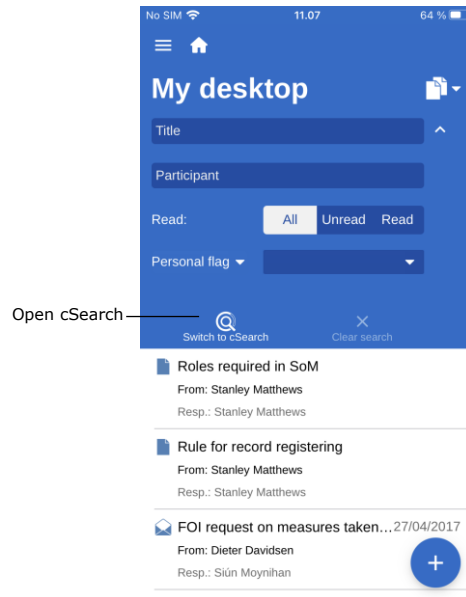
cSearch can be found by expanding the search options in any list. Tap ⌄ next to the search field above the result list and then **Switch to cSearch** to open cSearch.

Figure 109: Open cSearch

Quick search

Search quickly by entering the search word in the search field. The search will then start automatically.

Search word

Search results
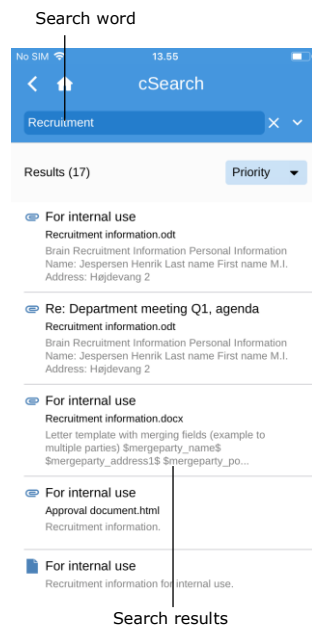
Figure 110: A search using cSearch

The search finds all contexts in which the search word/search text is included, both as a complete word and as part of a word.

To treat the search text as a completed word, enter a space in the search field after the last letter.

Tapping a result will display the corresponding record.

Advanced search

cSearch in F2 Touch contains the same advanced search features as in F2 Desktop.

Expand the advanced search fields
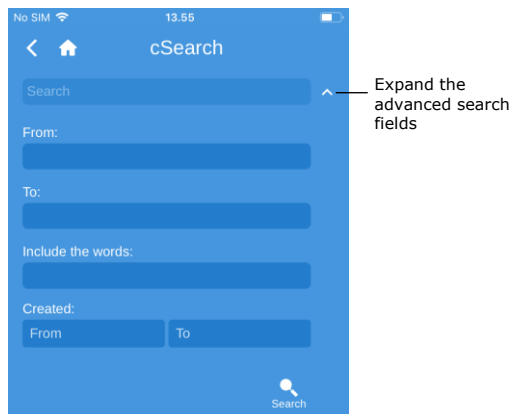
Figure 111: Advanced search

The advanced features allow e.g. searches for values in metadata fields such as "From", "To", "Created" or for the specific content of a record, case, chat, note, etc.

For more information, see *F2 cSearch – User manual*.

F2 Manager

F2 Manager is developed for iPads. F2 Manager provides both online and offline access to cases, meetings, and approvals for the organisation's employees and executives.

Transfer cases and records directly from F2 Touch to F2 Manager by opening a case and tapping the **case title** in the blue ribbon to view the case details. Then tap **Add** and **New F2 Manager**.

If there is already a meeting on the case, it will just say **F2 Manager**.
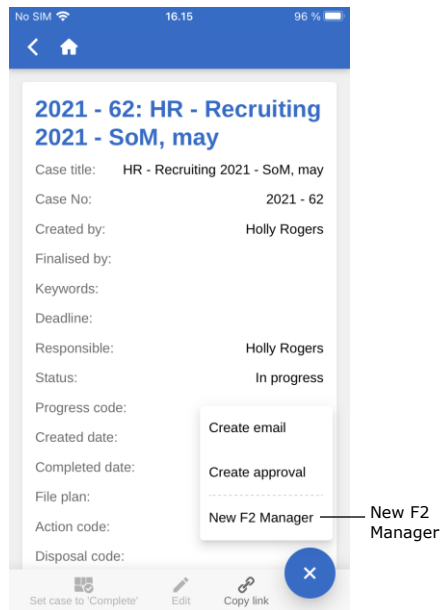
Figure 112: Transfer to F2 Manager

Tap **New F2 Manager** to open a synchronisation page for F2 Manager. This page contains relevant information associated with the transfer to F2 Manager, as shown below.

The same procedure is used here as when creating an ad hoc meeting in F2 Desktop. Read more about ad hoc meetings in *F2 Manager – User manual*.
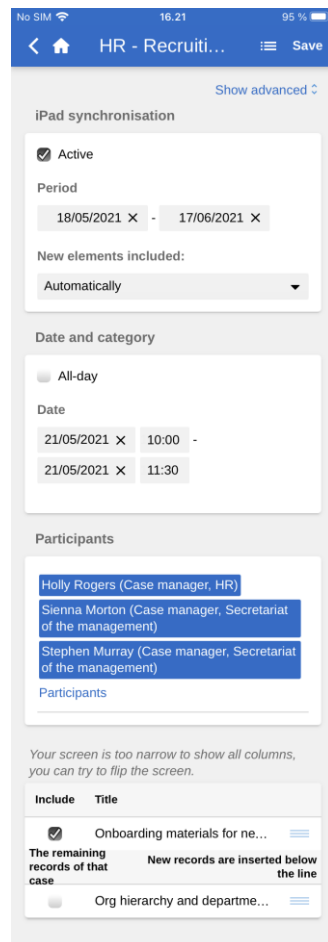
Figure 113: The synchronisation page for F2 Manager

On the synchronisation page, specify:

- iPad synchronisation.
  - Tick the "Active" box to make one or more records available on iPad in the time specified in the "Period" field.
  - Select whether to add new items automatically or manually to the synchronisation list.

- Specific meeting date and time as well as a category – the latter is an optional field that lets the user categorise the meeting.

- Participants to whose iPads the material is synchronised.

- The synchronisation list, which shows the case records to be transferred to F2 Manager.

- Removing a tick from a record will move it to the list called "The remaining records of that case". A record can also be moved by dragging it with a finger.

- "The remaining records of that case" is a list of records that will not be synchronised to F2 Manager.

Drag and drop
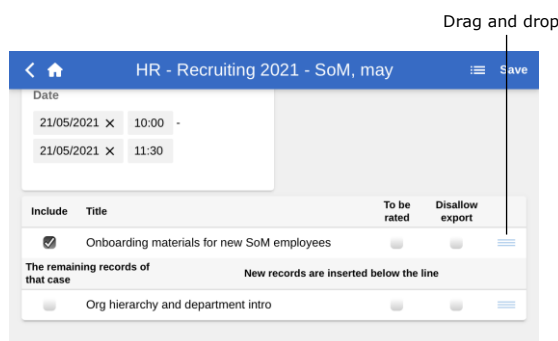
Figure 114: The synchronisation and "The remaining records of that case" lists

When the screen is rotated 90 degrees, F2 Touch adjusts so that all columns become visible.

By dragging a record with a finger, it is possible to change the order of the records or move records from one list to another. Hold **Drag and drop** ☰ and drag the record to the desired location using a finger.

Tap **Show advanced** at the top of the synchronisation page to add:

- Stakeholders.

- Title and description of the meeting.

- When evaluations can be submitted (until X hours before the start).

  - I.e. the individual items on the agenda are marked for evaluation so that each participant can vote and comment on the agenda items within the given time frame.

- When the evaluations can be shared (X hours before start).
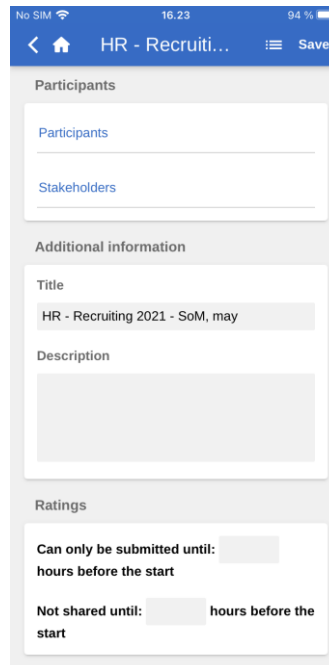
Figure 115: An expanded view of F2 Manager's synchronisation page

Once the information has been entered, tap **Save**.

> **Note**: In F2 Desktop, an F2 Manager tab is added to the case when a **New F2 Manager** is created via F2 Touch.

Annotations made in F2 Manager

In F2 Manager, it is possible to annotate documents attached to a meeting. This is a quick and easy way to add comments and highlight important sections in the document for later use.

Opening F2 Touch after making annotations in F2 Manager will automatically display the case with which the annotation record/document is associated. Annotation records can be found by searching the "Archive": Specify the user who made the annotation in the "Record/case responsible" field, and then enter "F2 Manager archive" in the free text search field to perform the search.

The search shows all records annotated by that user and may be saved to allow quick access to future annotations.

The annotations will not be visible if F2 Touch uses Apple's PDF viewer, which does not support these annotations. To accommodate this, F2 Touch allows the user to export the document to another app that can read annotations (such as Acrobat Reader).

For more information on annotations, see *F2 Manager – User manual.*

Supported browsers

F2 Touch is optimised for the following browsers:

- Google Chrome, latest version.
- Mozilla Firefox, latest version.
- Apple Safari for Mac, latest version (not on a Windows PC).
- Apple Safari for iOS, two latest versions.
- Android version 4.1 and later.
- Microsoft Edge, latest version.

Configurations

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

- Log in to F2 Touch using Touch ID on iOS devices with this functionality available.

- Log in to F2 Touch using "Remember me".

- Allow the user to select whether the dates and times displayed in F2 Touch depend on the time zone of the server or the device.

- Set up the users' options for creating, starting, and editing approvals (add-on module), including whether the approval is created without a record document attached.

- When an answer record to a request (add-on module) is created in F2 Touch it is automatically attached to the request record depending on the organisation's setup. The format is configured in F2 Desktop.

List of figures