F2 QUICK GUIDE

Documents, records, and cases

F2's structure is simple: Documents are attached to records. Records are added to cases.



Cases

Cases collect records concerning the same subject matter. F2's cases help create an overview and may be organised by e.g. keyword, file plan, or action code.



Records

Every task in F2 begins with a record. The record is a compilation of data and documents. Using their metadata, you can process and organise records. You can attach a record to a case either when creating it or later in the process.

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Documents

A document is always attached to a record. Before you start working on a document, or any other file, you must attach it to a record.

Attachments

F2 offers various options for attaching a document to a record. Either create a new document based on a template, drag and drop a document from one record to another, or import a document to F2 from your PC.