Communication

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Communication

F2 offers various means of communication. Each of these is intended for use in a specific situation.

Sometimes an email is the best form of communication, sometimes it is more efficient to use the chat feature or the option of reallocating responsibility for a record instead.

Below is a list of the various forms of communication in F2.

Communication form	Description
Email	Send, forward and reply to records. These functions are used for formal communication and for communication external to F2. Unlike an external email, when an email is sent internally in F2, recipients do not receive a copy of the record. All F2 users see the original record in their inbox. Sent records cannot be modified. Read more about emails.
Chat	Chat is used for informal communication in relation to tasks or other types of coordination and knowledge sharing in the organisation. Since chats must be created on a record, the context of the chat will always be clear, ensuring effective communication. Read more about chats.
Note	Like the chat, a note is an informal type of communication. Unlike the chat, the note is visible to all users with read access to the record to which it is added. Recipients can be added to the note to notify them of its creation. You can also add notes to cases. Read more about notes.
Responsible user/unit	Allocation of responsibility is used when assigning tasks to a unit or a user. The intention is to allocate tasks in F2 as one would place a task in a physical inbox or on a colleague’s desk. Read more about allocating responsibility.
Supplementary case manager	Adding a user or unit as a supplementary case manager in the “Suppl. case mgr.” metadata field notifies the user/unit that they are now a supplementary case manager on the record. This means that they now have access to edit the record. The extent of this access is specified in the personal settings of the user who adds them. Read more about supplementary case managers.

Communication form	Description
Annotation	An annotation adds formal information visible to all users to a record. Read more about annotations.
Request (add-on)	In F2, it is possible to request tasks from other users/units/authorities within the same F2 installation. Read more about requests.
Approval (add-on)	In F2, it is possible to submit records for a formal approval with other users and units within the F2 installation. Read more about approvals.

Email

In F2 it is possible to send, forward and reply to emails in the style of traditional email systems.

Emails may be sent internally or externally and are mainly used for formal communication. When an email is sent internally in F2, recipients do not receive a copy, but see the original record in their inbox.

The email's icon and its status text in the main and record windows show if it has been forwarded or replied to, regardless of who has performed the action. This means that the icon is shown on a forwarded record, also when either action has been performed by another user.

New email

Emails can be created in either a simple mode or a detailed mode. The simple mode is similar to emails created in other email clients, while the detailed mode is based on F2's record window.

NOTE The simple email mode can only be enabled if the organisation's configurations allows it.

Click on **New email** in the main, record or case window to create a new email.

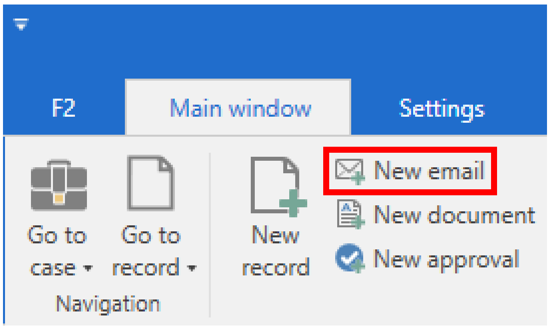


Figure 1. The "New email" menu item in the main window

The record is created in simple or detailed mode depending on the user's personal setup. For detailed emails, it is possible to decide how many metadata fields are shown on the newly created email.

New simple email

When an email is created in simple mode, the "New email" window opens instead of the record window, and only the delivery fields are visible.

In simple mode, files on the local computer can be attached by clicking **Attach file** in the ribbon.

NOTE It is not possible to attach a template, document, or record from F2 in simple email mode.

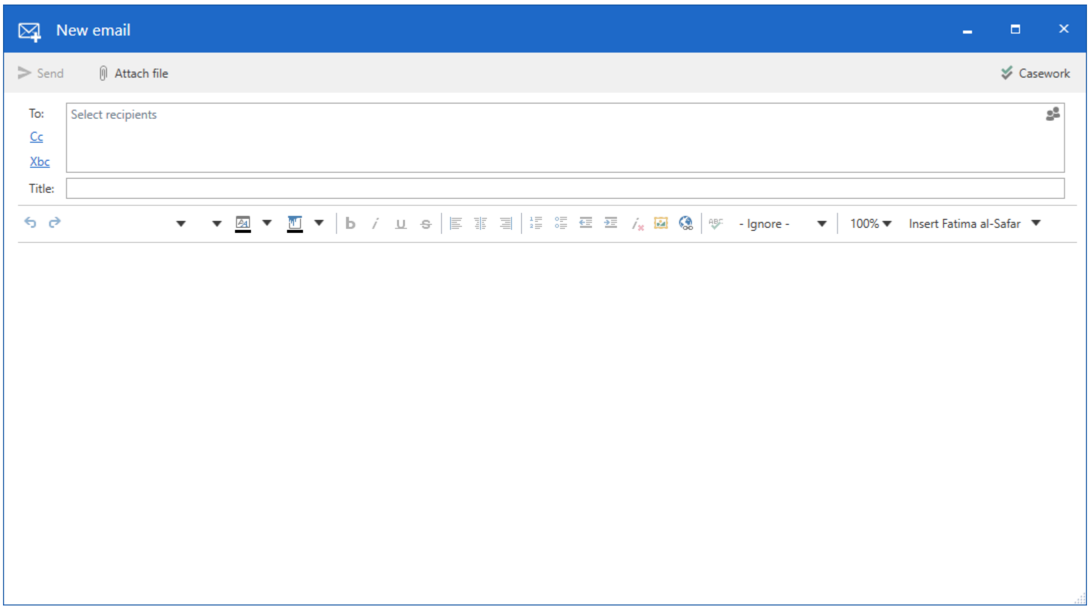


Figure 2. The “New email” window

In the “New email” window, most of F2’s case processing functions are disabled. This means that creating and sending simple emails is faster than detailed emails, but several functions are different:

- Case help is disabled. Consequently, simple emails may not comply with the guidelines of the authority.
- No clean-up is performed, though the email is removed from “My desktop” when sent. For further information about clean-up when sending, see the article Menu items on the “Advanced” tab.
- Sender cannot be changed. The user’s default sender is listed as both creator and sender of the email. The default sender is defined in the "Setup" dialogue’s "Records" tab.
- Attachments cannot be edited.
- The format of attachments cannot be changed before sending because the Metadata Assistant is not supported.
- The email text is not autosaved.
- Signatures from the detailed email format must be edited before they can be used with simple emails.

Click **Casework** in the upper right corner to switch from simple mode to the detailed record window with the delivery fields visible and all regular functions enabled.

An email sent in simple mode does not affect how it is received. A simple mode email sent internally in F2 is received as a regular incoming email with the same processing options for the recipient. The access level of simple mode emails is determined by the organisation’s choice of access level for new records, which is “Involved” by default.

New detailed email

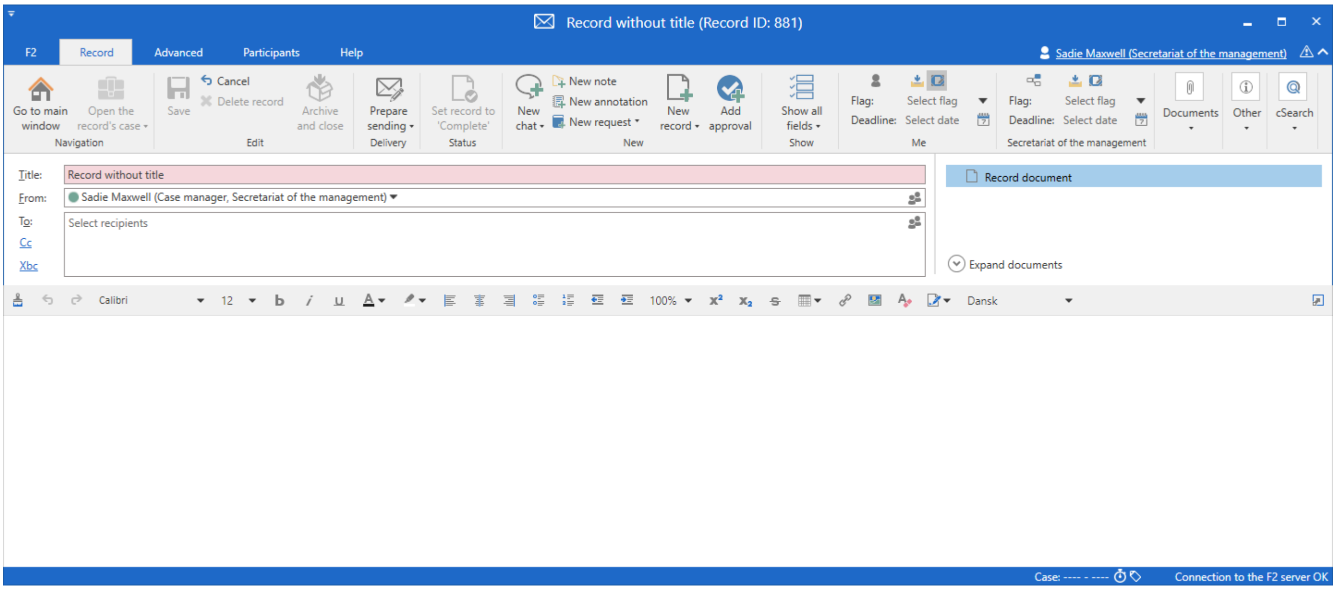


Figure 3. Create email

The email's metadata fields

When creating an email, whether in simple or detailed mode, the user must consider the following metadata fields:

Field	Description
“Title”	Corresponding to the subject field in an email, the user must enter a title in the email window. Contrary to the standard record creation process in which F2 needs the user to enter a title before the record is created, this field is not filled in automatically.
“From”	This field is only visible in detailed mode and is filled in automatically when a new email is created. It is possible to select whether the default sender for emails is the user or the user’s unit. Read more about the default sender in "Setup" dialogue’s "Records" tab. F2 allows for the following to be inserted as sender: • The user • The user’s unit • Another user in the unit • The authority. When text is entered in the field, F2 will search for names of internal users, distribution lists and external participants. Participants may also be added by clicking on the participant icon, which opens the “Choose participant” search dialogue.
“To”	Enter the recipient(s) of the email here. There are three ways to add participants as recipients: • By typing in the field directly. F2 will search for names of internal users, distribution lists and external participants. • By clicking the participant icon, which opens the “Choose participant” search dialogue. • By copying and pasting email addresses from e.g. an Excel file.
“Cc”	Enter any Cc recipients of the email here. Cc recipients are added in the same manner as “To” recipients.
“Xbc”	Enter any Xbc recipients of the email here. Xbc recipients are added in the same manner as “To” recipients. Adding an external participant here is similar to adding a recipient in the

Field	Description
	"Bcc" field of traditional email systems. There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

NOTE Suggestions in the "To", "Cc", and "Xbc" fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

The "Choose participants" dialogue

Click the participant icon in the "To", "From", "Cc", or "Xbc" fields to open the participant search dialogue.

In this dialogue the user selects participants to add to the desired field. To add a participant and close the dialogue, double-click the **participant's name** or select the name and click on the **OK** button. To add a participant and keep adding, click the **Add participant(s)** button. The dialogue will show any added participants in the "Chosen participants" list.

Click on **OK** when all desired participants have been added to the list.

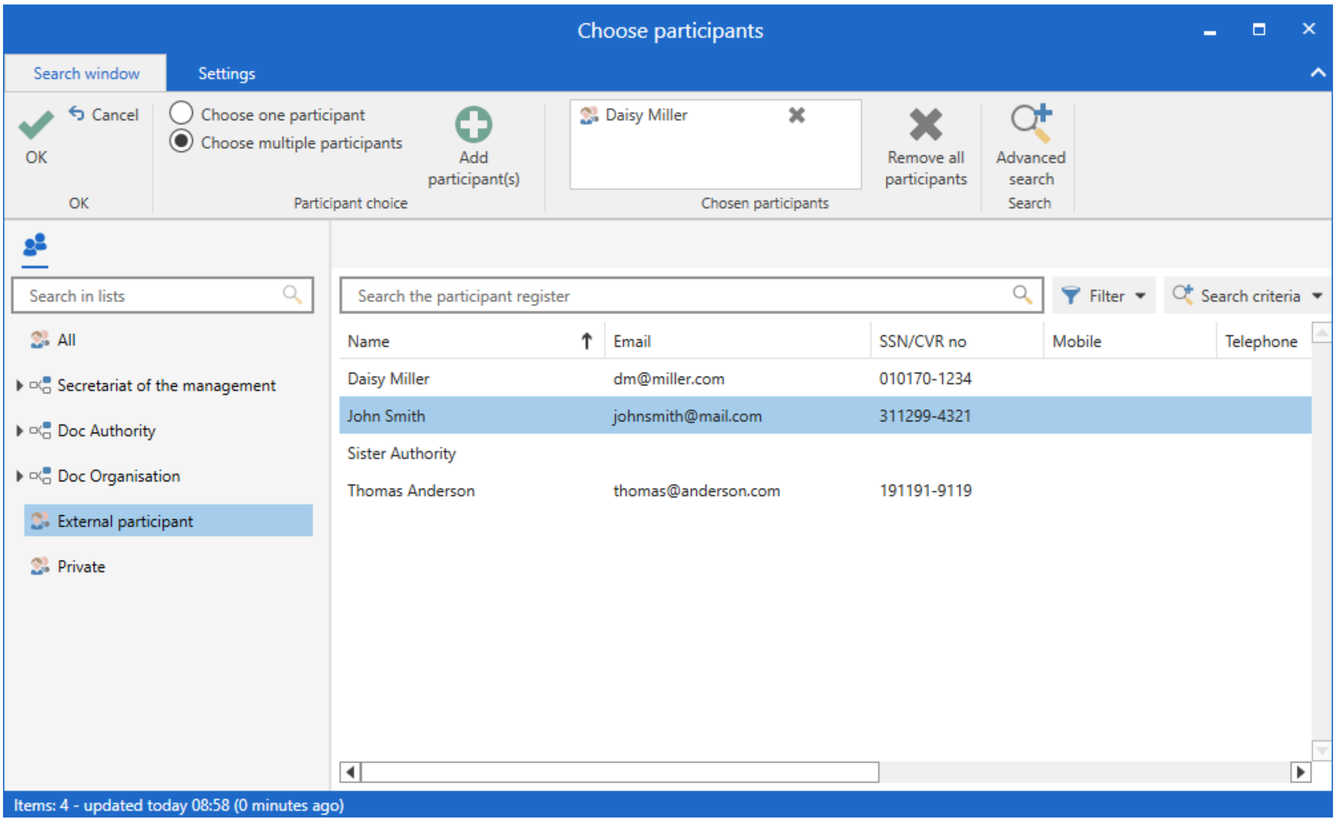


Figure 4. The "Choose participants" dialogue

Read more about creating participants and editing their placement and properties.

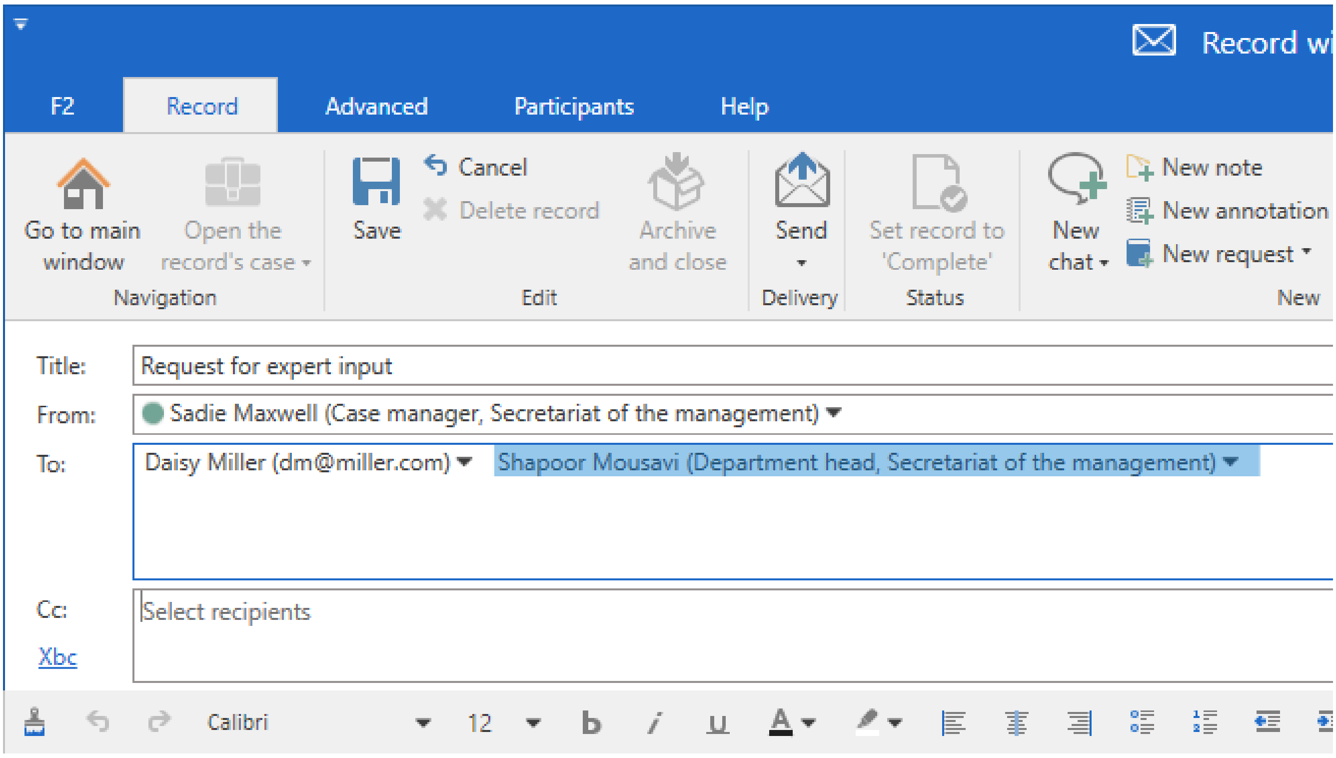


Figure 5. Drag and drop participant

Display participants

Recipients in the “To”, “Cc”, and “Xbc” fields can be displayed as a list, making it easier for the sender to see their names.

Clicking on expands the field and displays a list with all recipients.

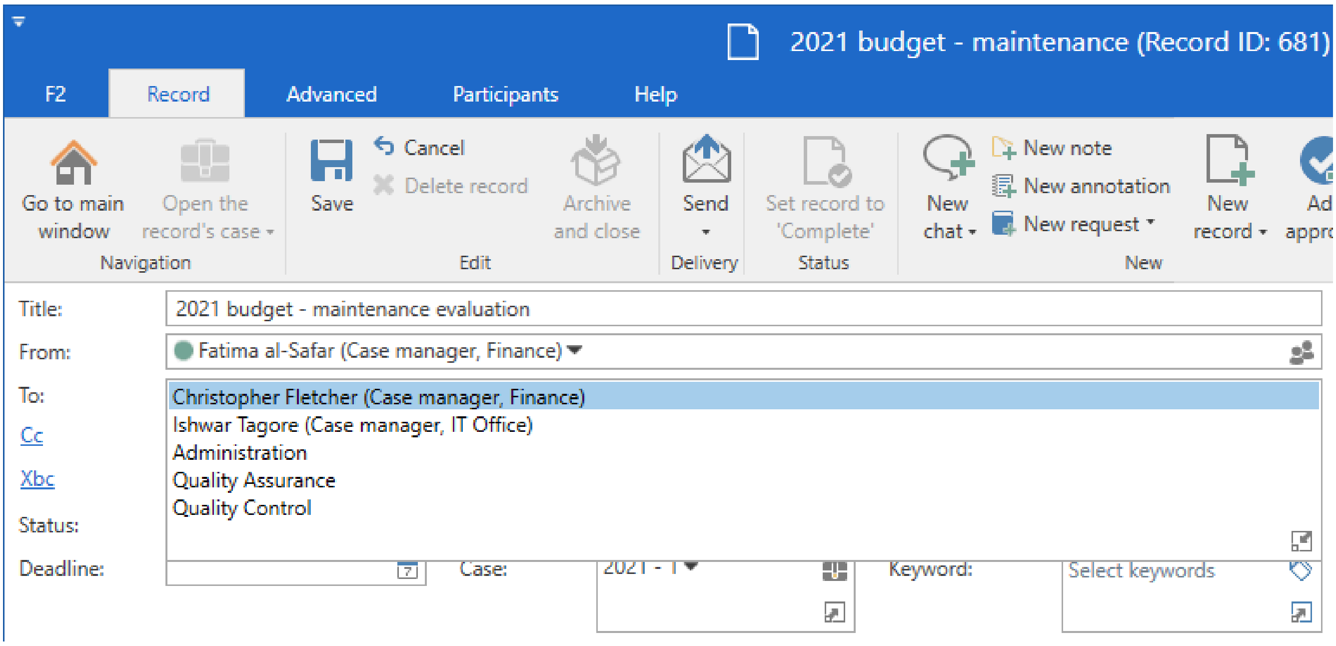


Figure 6. Participants displayed as a list

It is possible to view additional information on an added participant. Hover the cursor over the participant’s name to view a tooltip with online status, out of office status (if any), and details regarding their job roles.

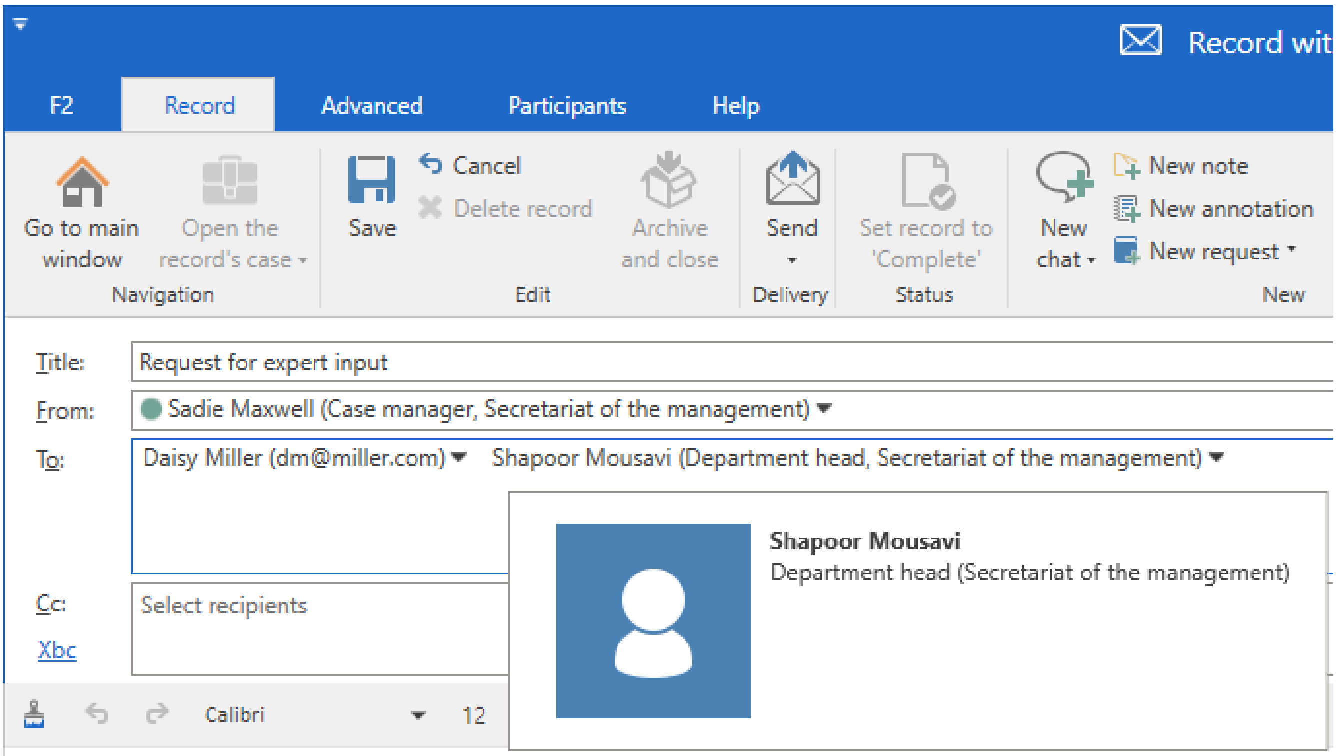


Figure 7. Participant tooltip

The participant properties can be accessed from the email by right-clicking on the participant and selecting **Show properties**.

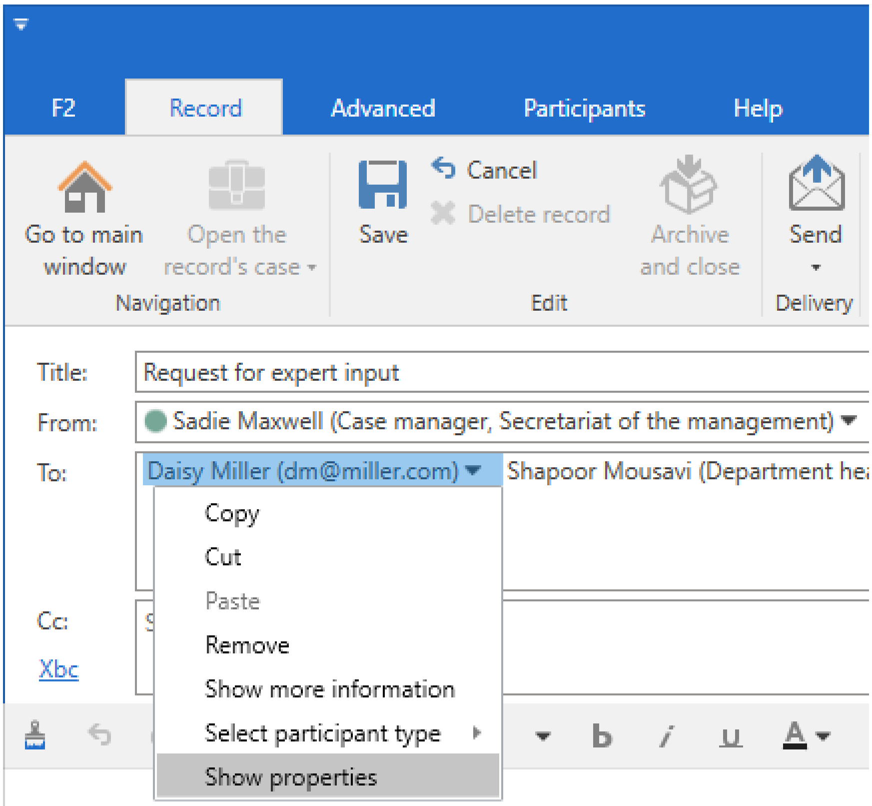


Figure 8. Participant properties

This will open the participant properties dialogue named after the participant.

The participant properties dialogue

This dialogue displays information on the participant in question sorted across several tabs. The titles and contents of said tabs depend on whether the participant is external or a user. Users are displayed with the following tabs:

- The **General** tab contains fundamental information such as login and contact information.
- The **Private** tab contains address and SSN.
- The **Other** tab contains information on any email domains owned by the user, and the user's setup as a participant in F2.

External participants are displayed with the following tabs:

- The **General** tab contains fundamental contact information such as phone number and address.
- The **Identification** tab contains information from external registries such as CPR.
- The **Other** tab describes how the participant is set up in F2 and contains additional contact information including website.

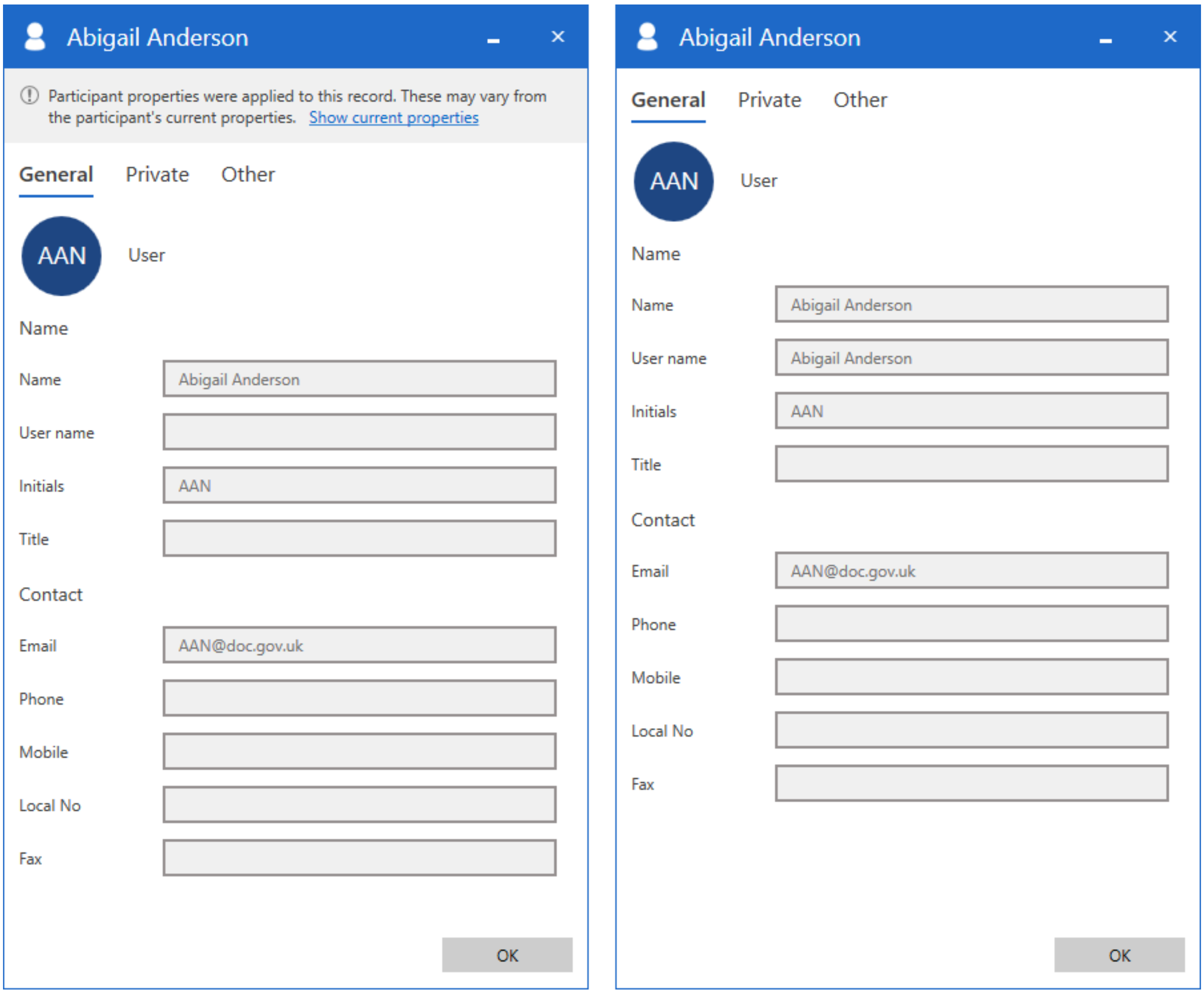


Figure 9. Properties for the user [participant] (Record edition)

The information displayed in this dialogue is configurable. Configurations are made in cooperation with cBrain.

TIP cBrain recommends regular maintenance of the participant register to ensure up-to-date information.

Create participants from emails in F2's participant register

F2 automatically checks whether an external participant already exists in the participant register based on the fields "Name" and "Email".

If F2 detects a participant on an email that cannot be found in the register, it may be added in one of the following ways.

- When a record containing unknown participants in the delivery fields is set in edit mode, F2 prompts the user to add them to the participant register if the related setting is enabled in the user's personal settings.
- Create the participant from the "To", "Cc" or "Xbc" fields directly by right-clicking on the unknown participant's email address, or by clicking on the "Create participants" link which appears when these fields contain unknown email addresses. If the email is sent from the user's personal archive, F2 suggests creating the participant in the private register.

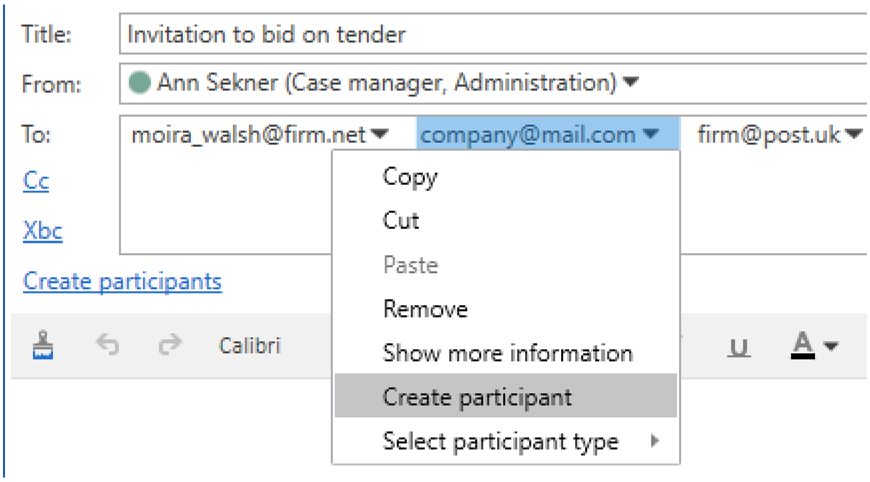


Figure 10. Create external participant in the participant register

Both actions open the "Create participants in the participant register" dialogue where the participants can be added. General management of the created external participants is described in The participant register.

The "Create participants in the participant register" dialogue

Saving an unknown participant to F2's participant register is done via the "Create participants in the participant register" dialogue.

From here it is possible to create a new participant or replace an unknown participant with an existing one. This is done by clicking either **Create participants** or **Replace selected**. Through this dialogue, the location of the participant is also selected.

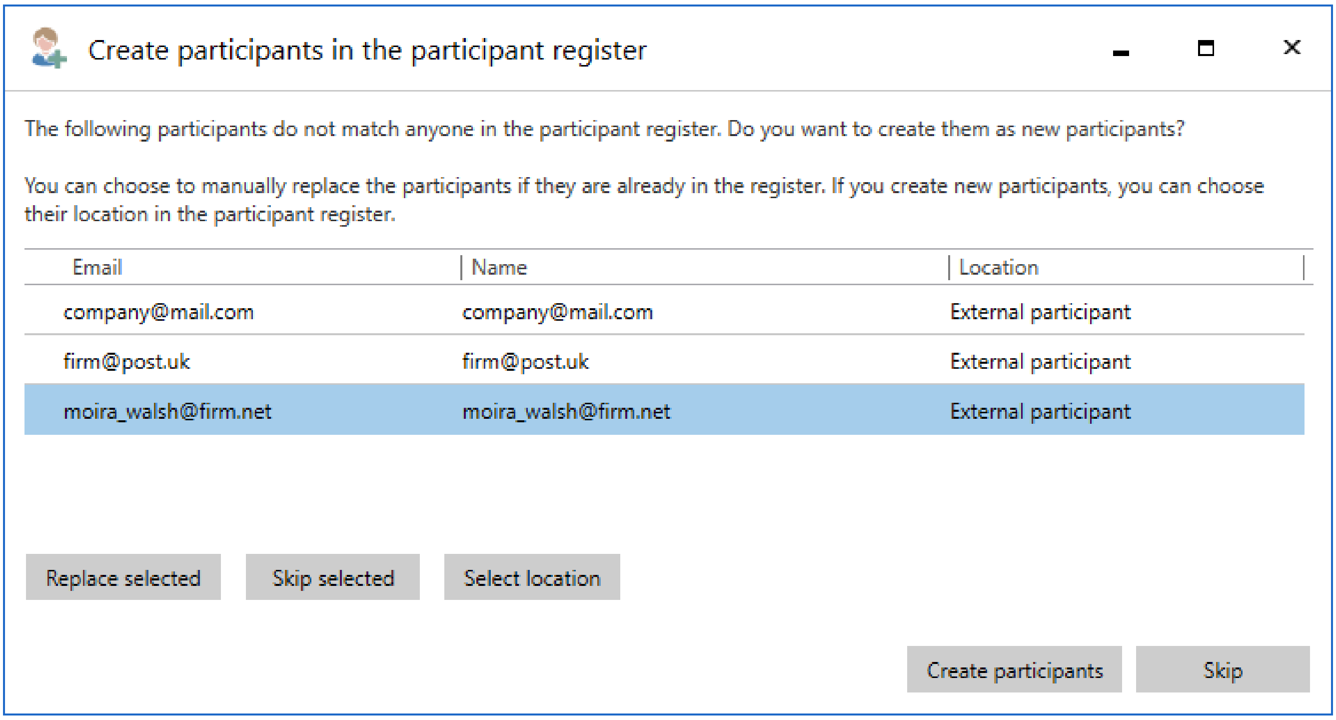


Figure 11. Create participants in the participant register

Select one or more participants in the dialogue to create, replace, or skip. The participants are removed from the dialogue once a decision has been made.

To replace an existing participant with one of the unknown ones, click **Replace selected**. The “Choose participant” dialogue opens, from which the relevant existing participant can be found.

If necessary, click **Select location** first to select which node to create the new participants in rather than the one suggested in the “Location” column.

Click **Create participants** in the bottom right to create the highlighted participants as new participants in the participant register.

To skip the highlighted participants, click **Skip selected**. It is also possible to dismiss the entire dialogue by clicking **Skip** in the bottom right. The participants will be present in the dialogue the next time it opens as long as they are unknown.

NOTE	F2 can be configured to allow multiple participants with the same email address. In this case, the “Create participants in the participant register” dialogue will display a warning for each participant with a duplicate email address. F2 is configured in cooperation with cBrain.

Placement of new participants

Click **Select location** in the “Create participants in the participant register” dialogue. The “Choose participant” dialogue opens. Here, select a location for the participant by double-clicking on a node or by selecting a node and then clicking **OK**.

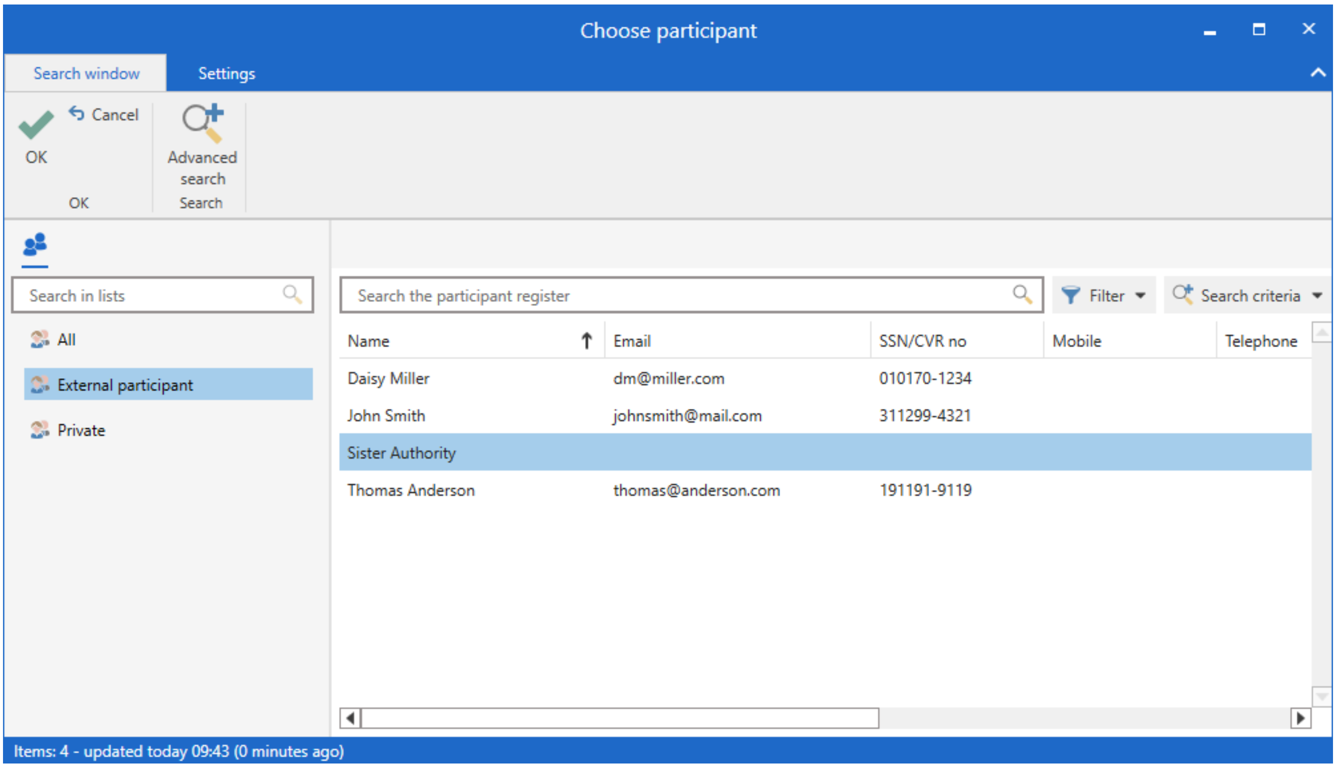


Figure 12. Set participant location

The default location for new participants is the "External participants" group. Placing a participant here requires the "Editor of participants" privilege. Without this privilege a participant can only be created in the "Private" node. This default node can be changed during the installation of F2.

Format selector for emails

Before sending an email, it is possible to select the file format for any attached documents. If the delivery metadata fields are shown, the user will be able to change formats in the document area.

Right-click on the attached document in the document area. From the context menu, select whether the attached document should be in PDF format or the document's original format, e.g. Word or PowerPoint format.

If the F2 Metadata Remover (documentation available in Danish) is available in your organisation's F2, you can use it to clean up your document before sending.

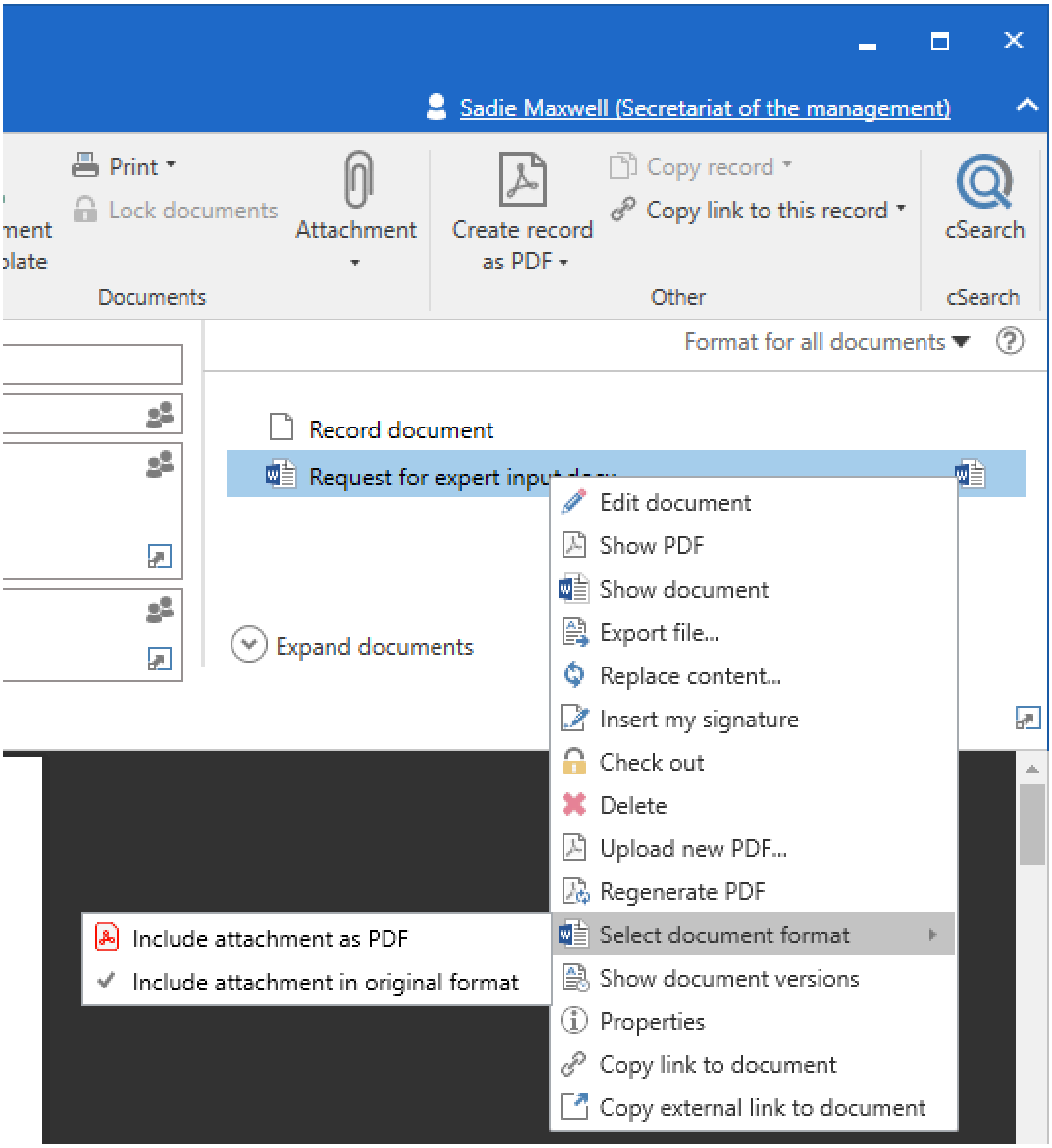


Figure 13. Format selector

NOTE The format selector has no effect on emails sent internally in F2. It only affects emails sent to external participants who will receive attachments in the format selected by the sender.

If there are several documents attached to the record, it is possible to mass-select the format.

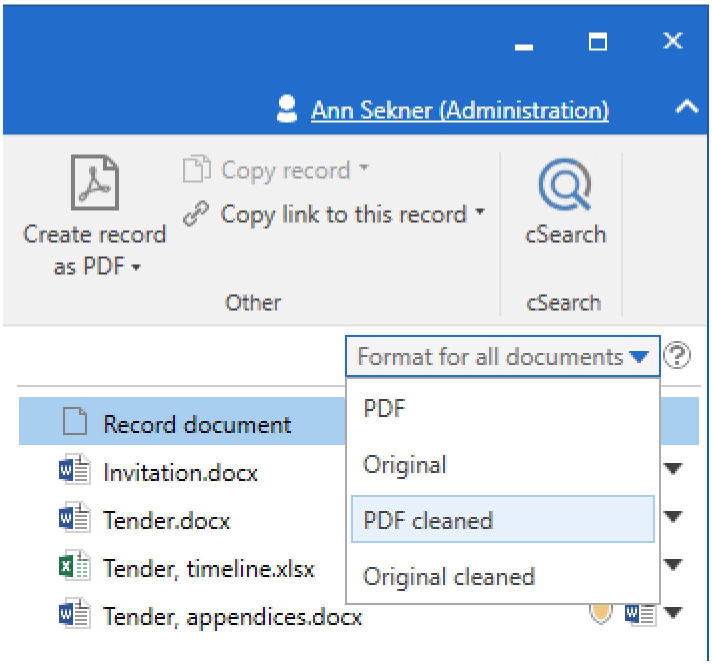


Figure 14. Selecting the same format for all documents

Email details

The record window for an email shows when it has been sent or received and whether it has been exchanged internally in F2 or externally. Any issues during the sending of the email are also registered. These details are shown directly below the record ribbon.

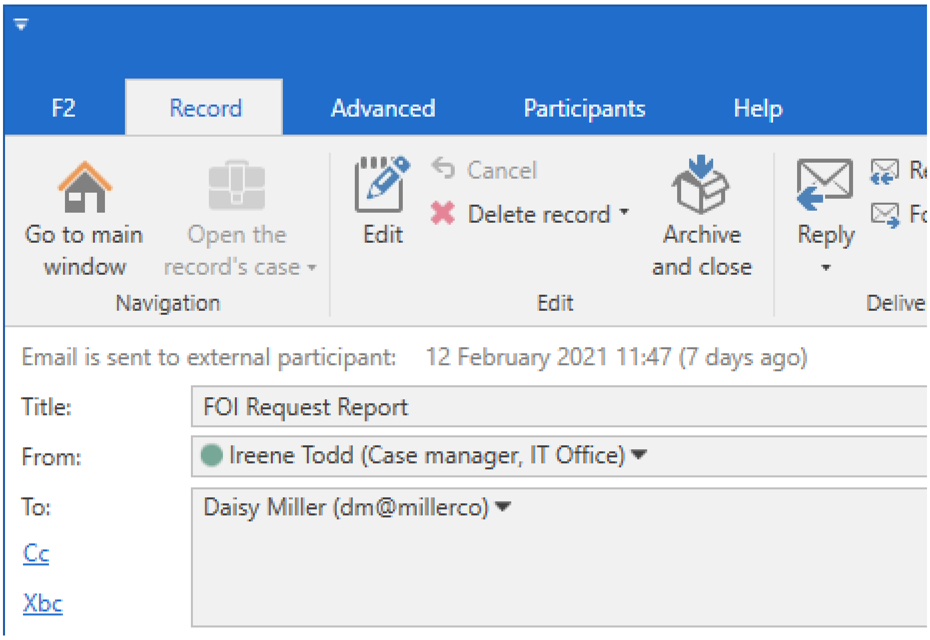


Figure 15. Email details

Receiving external emails

When an email is received in F2, its text and any attachments will be locked so they cannot be edited.

However, it is possible to edit certain metadata for an incoming email, if the user has full write access to the record:

- “Title”
- “From” (sender)
- “To” (recipients)
- “Cc” (recipients)

Changes to the record’s metadata can be seen via the “Advanced” tab of the record window. From here, click the **History** menu item and then the **Show metadata** view as shown below.

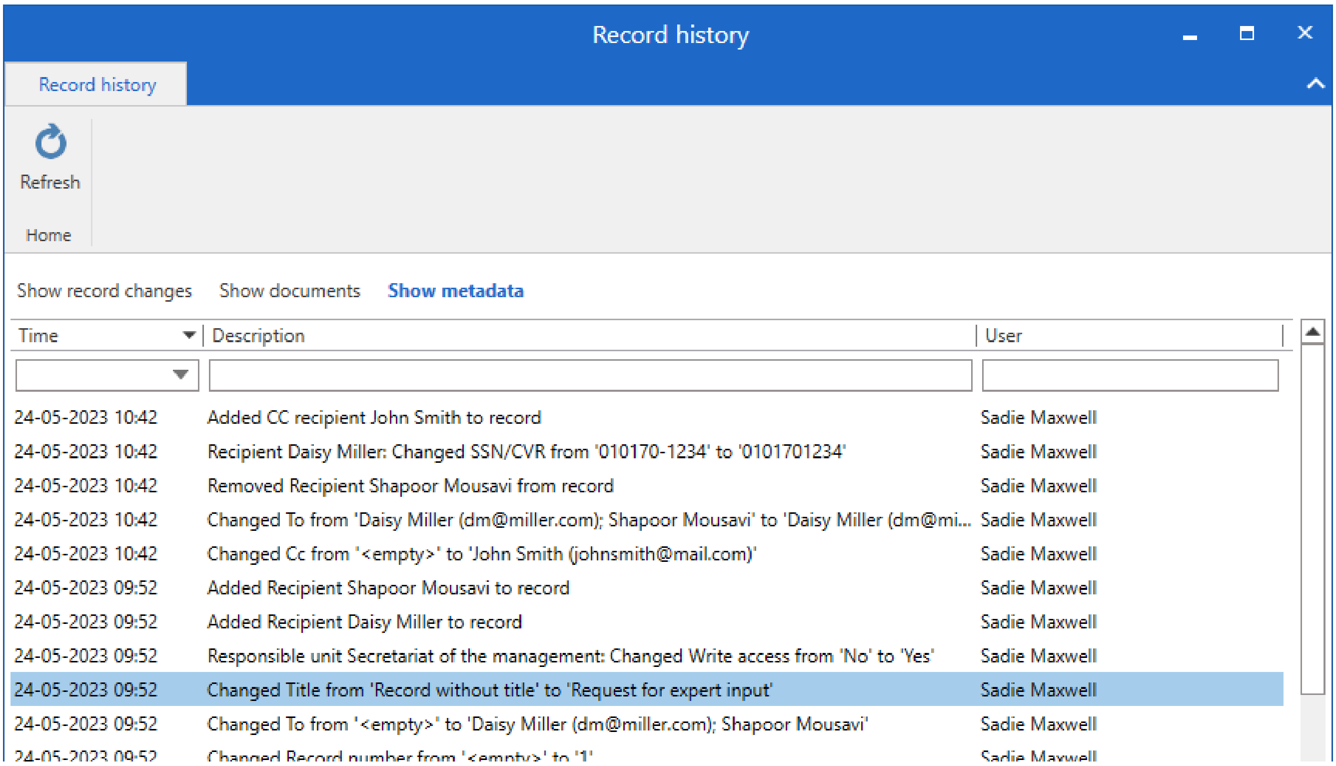


Figure 16. History of the record metadata

NOTE It is possible to search for both the record’s current as well as its original title via the “Record title” and “Record/case title” search fields in the "General" search group. The search result always displays the email’s current title.

Automatic case linking when external participants reply to emails from F2

F2 can be configured to link replies from external users to the record to which they are replying. This can be configured during the installation of F2.

When the setting is enabled all email replies from the external address are automatically associated with the original email. If the record to which the incoming email is related has a case number, the incoming email is automatically added to the case.

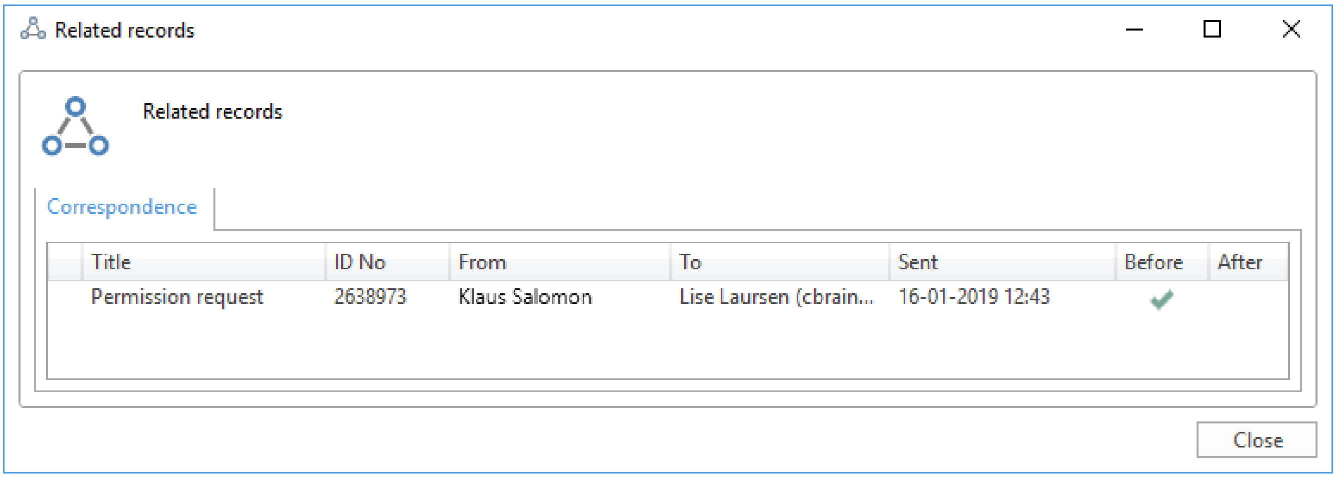


Figure 17. The "Related records" dialogue

Additionally, it is possible through a setting to automatically add the record ID or case number in the "Title" field to all outbound emails from the authority. This setting is described here.

Access levels and emails

Various factors determine the access level assigned to emails depending on how the email is created in F2. These factors are described in the following sections.

Access level for external emails imported into F2

If F2 is configured to import emails from a mail server, records are automatically assigned an access level when created in F2. This is a critical issue to consider for the F2 organisation.

For many organisations it is an advantage that emails which are NOT private can be viewed and processed by various employees, and that these emails are available to the organisation e.g. when employees are ill or leave their position.

By default, F2 is configured to respect employee privacy. This means that F2 automatically assigns the "Involved" access level to imported emails, so only the recipient will be able to view the email unless the access level is changed.

It is also possible to assign the access level "Unit" to imported emails. This configuration is done in cooperation with cBrain.

The access level for imported emails can be viewed and configured from on "Settings" tab in the "Setup" dialogue, specifically the "General" tab.

Access level for replying and forwarding

Records that are replied to or forwarded are automatically given the access level corresponding to that of a newly created record. As with new records, the user also has the option of using case help. The access level for new records depends on the organisation's configuration.

NOTE	In cooperation with cBrain, F2 can be configured to copy the access level of the original record when it is replied to or forwarded.

Case help for emails requiring formal processing

F2 can be configured to expand the access level for formal emails while restricting the access level of users' private emails. This is done with case help.

If an imported email requires formal processing, the recipient ticks the “Case help” box in the record window.

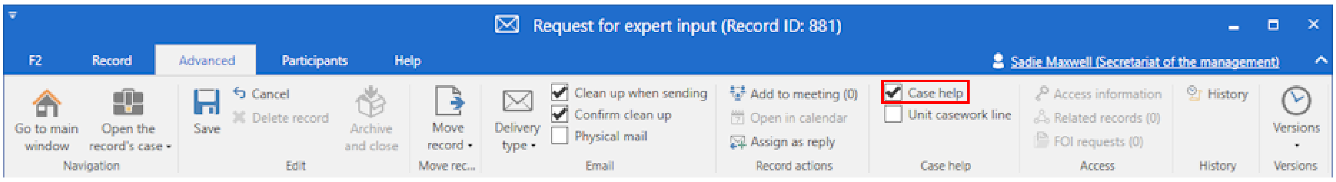


Figure 18. “Case help” on the “Advanced” tab

Read more about the case help.

Chat

Chat is used for informal coordination and communication related to work tasks or knowledge sharing. The chat function is used for chatting with other F2 users in the same authority about a particular record.

The chat function in F2 is particularly effective because the chat is always related to a specific record. The subject of the chat, i.e. the record, is automatically shared, which allows for easy orientation for the chat recipients.

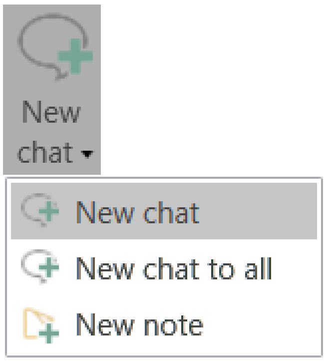


Figure 19. The main window's "New chat" menu item

A new chat can be added to a record, including an email, via the main and record window ribbons.

Users can access all records from which they have chatted via the main window search list, "My chatted records". Read more about this list and its contents in Standard lists.

Only chat participants can see the contents of a chat, but via the "Participants" tab anyone with access to a given record is able to see which users are added as chat participants.

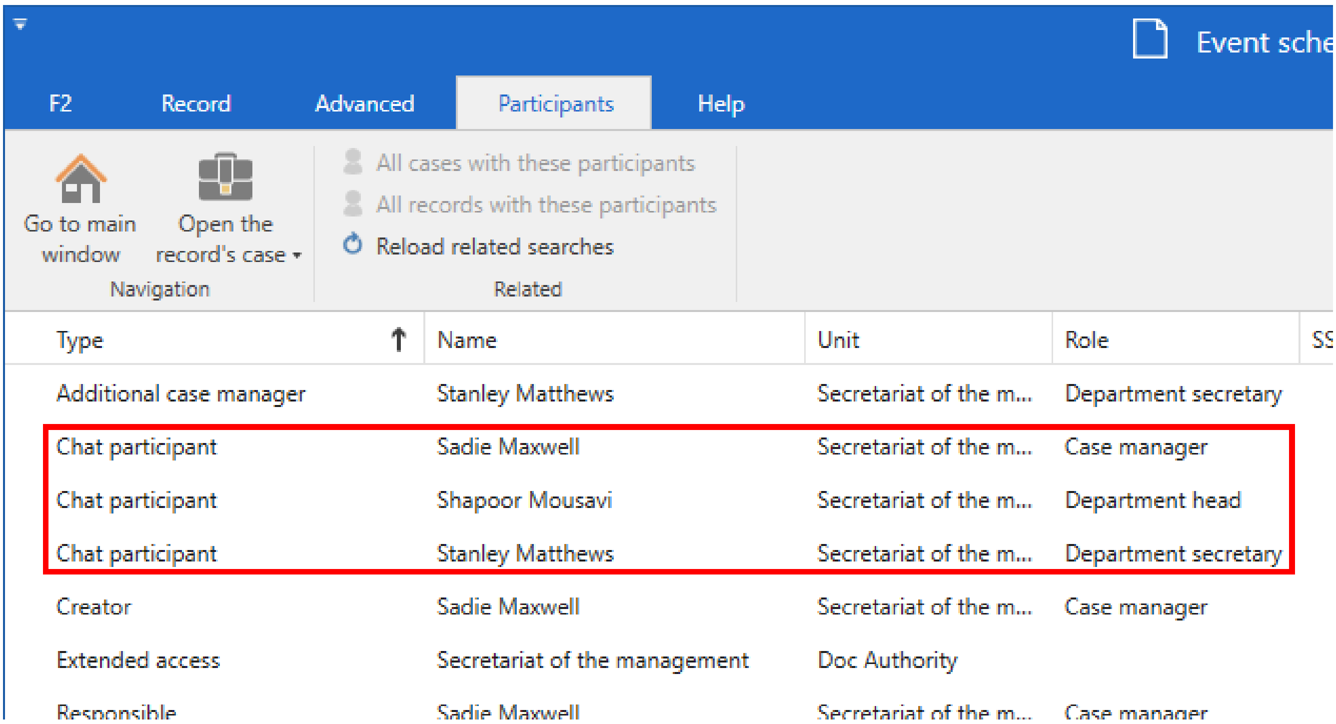


Figure 20. Chat participants shown on the "Participants" tab

Chat advantages

Chats have a number of advantages to sending internal emails, for example:

- A chat can only be seen by the users who are added as chat recipients.
- A chat can be deleted from a record.
- A chat makes it possible to edit a record without sending it.
- Several chats with several users can be created and opened on the record simultaneously.
- A chat can be used as a to-do list for the chat creator, since it is only visible to other users if they have been added. This way a user can have one or more to-do lists on a record that are only visible to themself.

Create a new chat from the main window ribbon

A chat can be created directly from the main window. Select a record in the main window and click on **New chat.** A new chat is then created without the record being opened.

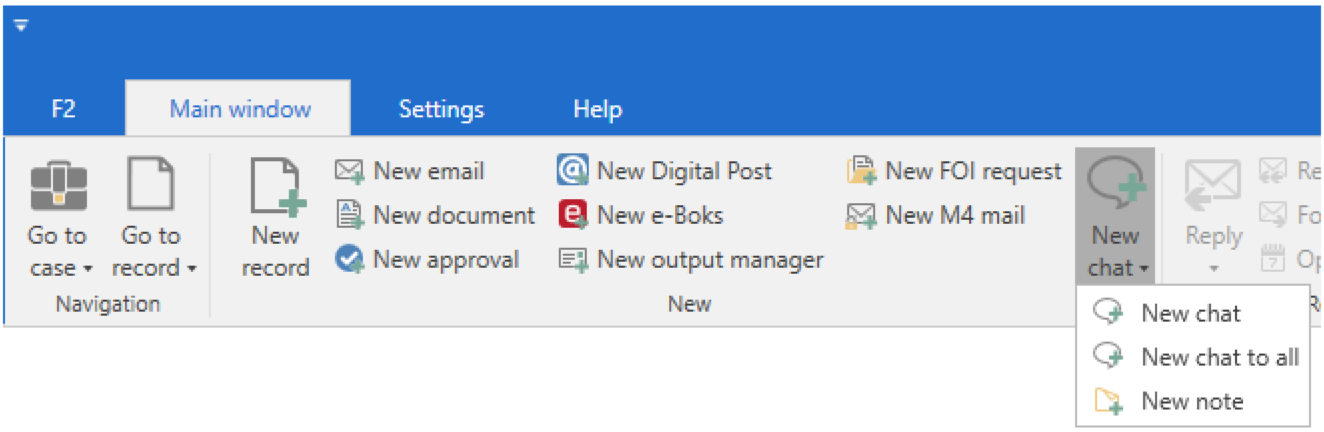


Figure 21. Add new chat from the main window ribbon

Create new chat from the record window ribbon

A chat can be created from the record window ribbon. Click on the menu item **New chat** to create a chat linked to the open record.

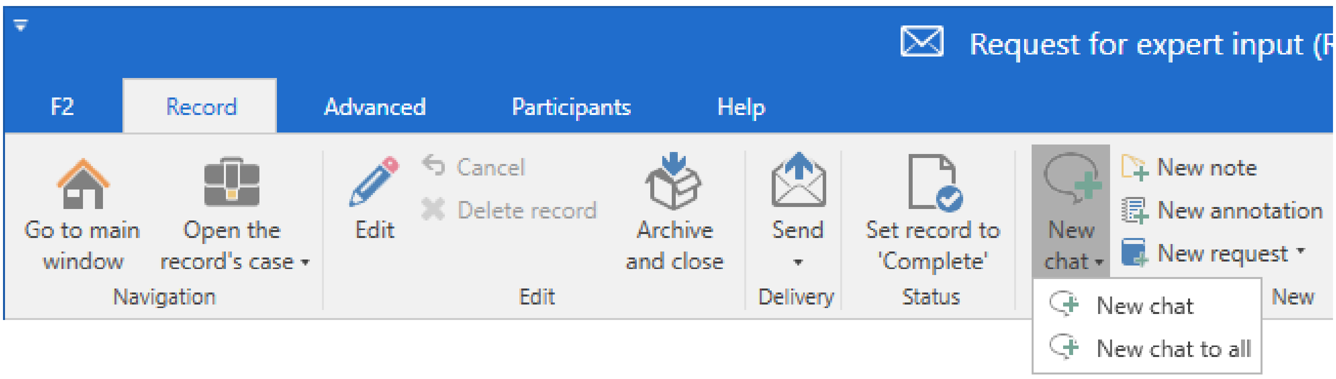


Figure 22. Add new chat from the record window ribbon

When a new chat is created, either from the main window or from the record window, the chat window opens.

The chat window

In the chat window it is possible to add participants to a conversation (1) and exchange messages (2). If there is more than one chat on a record, a list of chats is shown at the left side of the window (3).

A new chat can also be created from the chat window by clicking **New chat** (4).

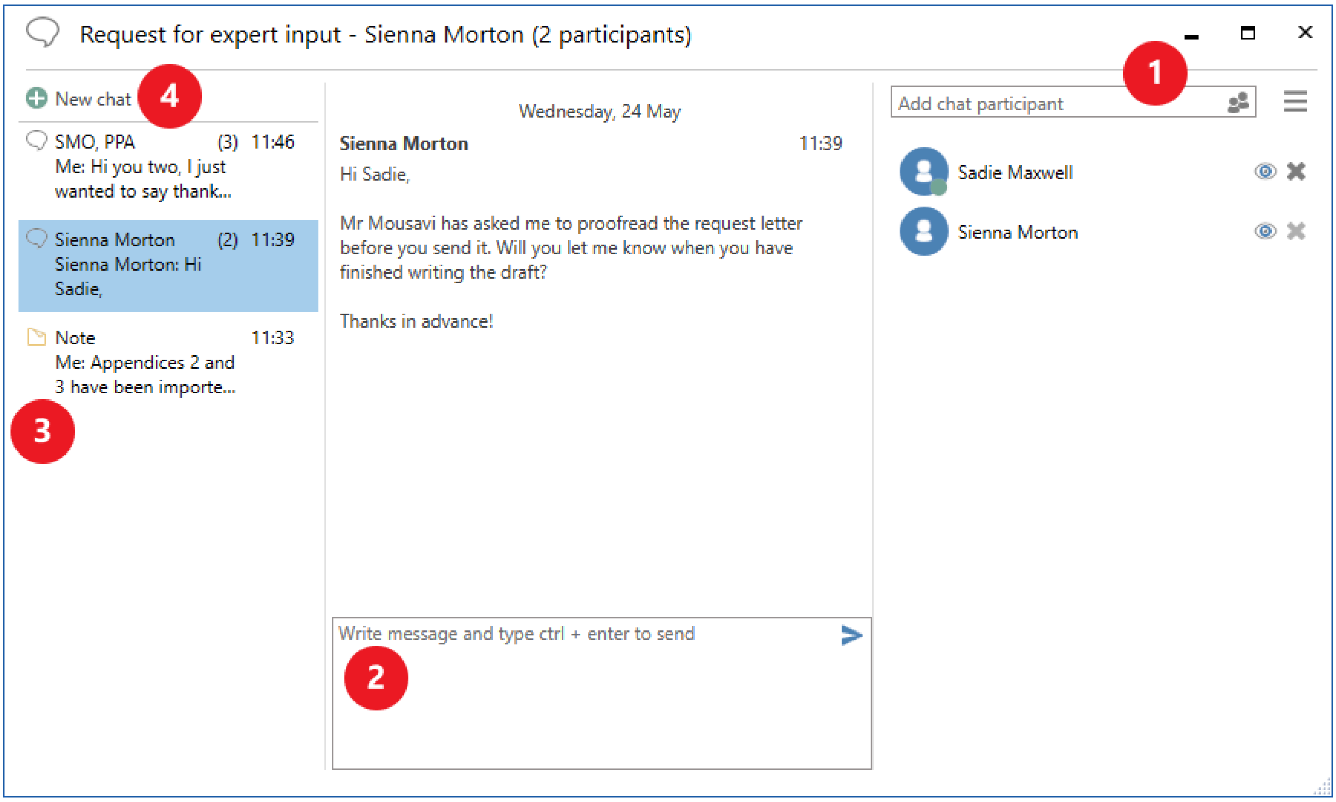


Figure 23. The chat window

Add chat participants

Chat participants can be added via the “Add chat participant” field in three ways:

- By writing the name of a user. As a name is entered in the “Add chat participant field”, F2 suggests relevant F2 users in a drop-down menu.
- By clicking the **participant icon** in the right side of the field. Read more here.
- By pressing the **down arrow** key to select a predefined participant group. Read more here.

NOTE Suggestions in the “Add participants” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

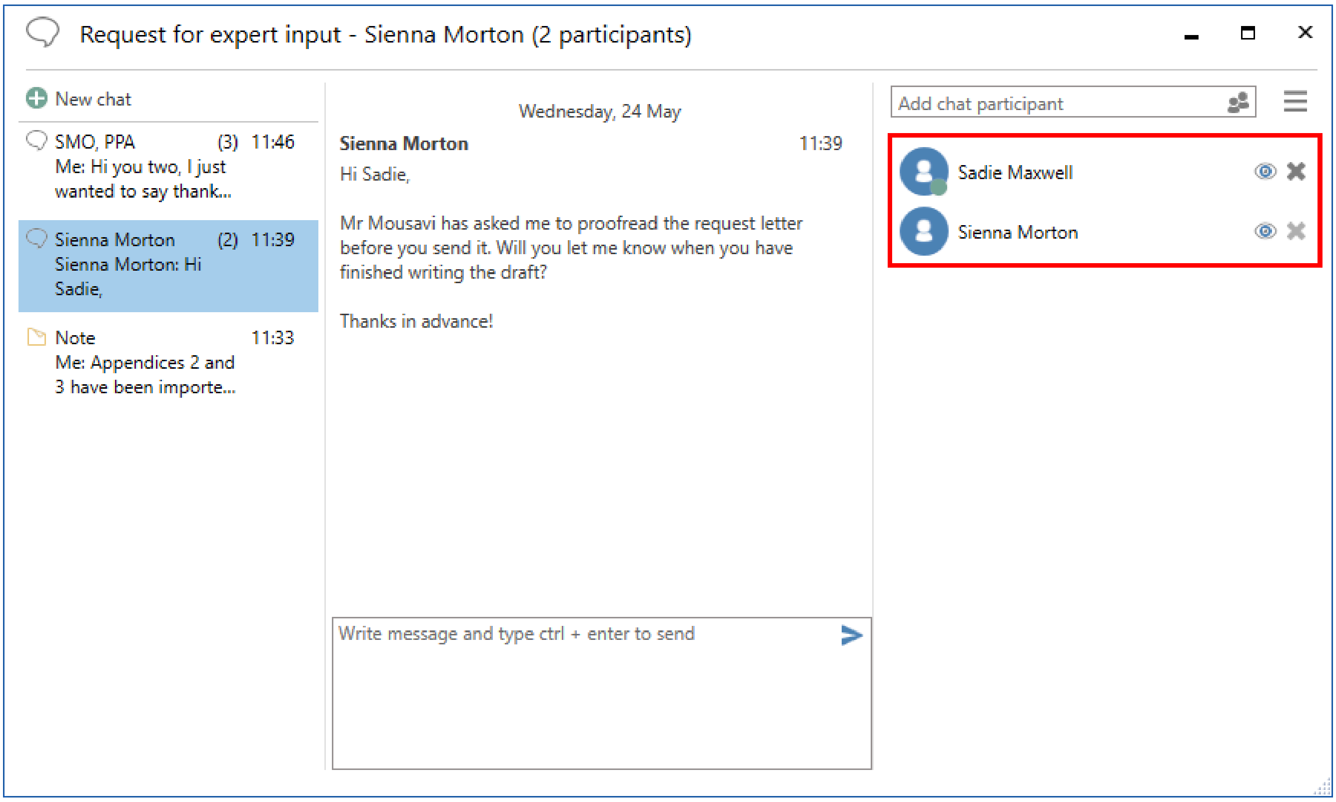


Figure 24. Conversation in the chat window

A warning message is shown in chat window if the user is the only participant in a chat.

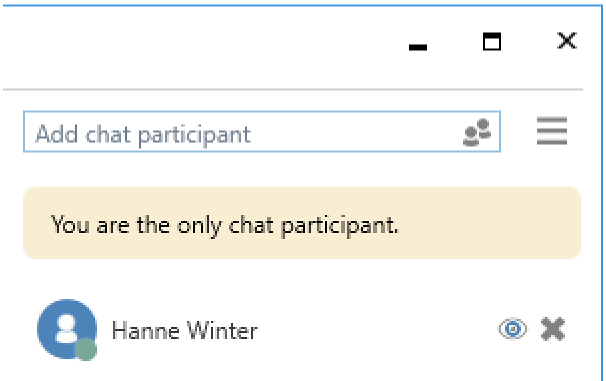


Figure 25. Chat window warning message

Add participants via the participant register

Click the **participant icon** in the right side of the "Add chat participant" field to open the “Choose participant” dialogue. Locate the relevant user in F2’s participant register. If you have "Choose one participant" selected (1), you can double-click on the user to add them to the chat and simultaneously close the dialogue.

If you have "Choose multiple participants" selected (1), the user will be added to the "Chosen participants" field (2) when you double-click them. You can then add more users. Click **OK** (3) to add all selected users to the chat and close the dialogue.

Multiple chat participants can be added simultaneously by selecting the relevant users and clicking **Add participant(s)** (4) in the dialogue ribbon. This way, multiple participants are added to the chat. When all relevant users have been selected, click **OK** to add the users as chat participants.

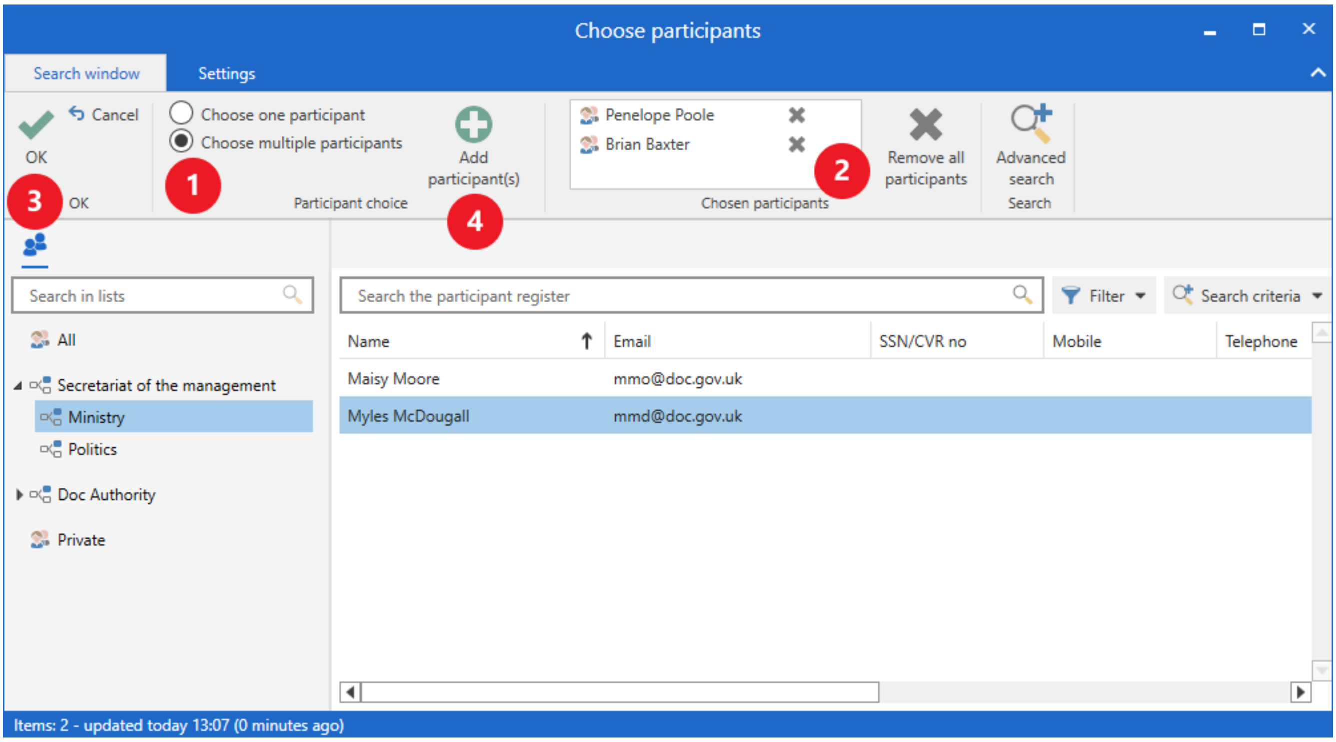


Figure 26. Add chat participants from the participant register

Add predefined participants group

By pressing the **down arrow** key while focus is in the “Add chat participant” field, predefined participant groups become available. The groups are comprised of users who are involved on a record in the following ways:

- Senders and recipients corresponding to the **Chat to all** function. The function is described in Chat to all.
- Responsible user or unit and supplementary case managers.
- Approvers who have approved the record.
- The user’s secretariat if one exists. The secretariat is defined as users with “On behalf of” rights that allow them to manage approvals for a user such as a minister.

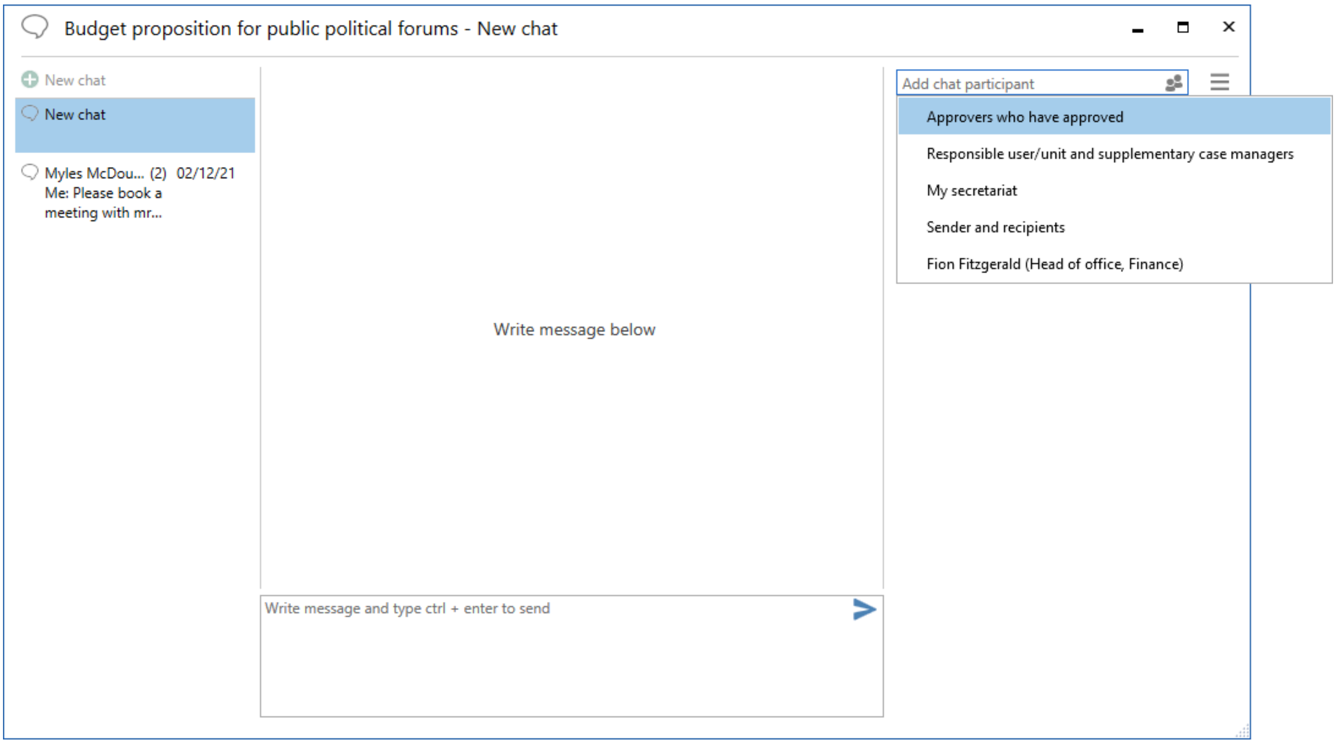


Figure 27. Add group in the "New chat" dialogue

View chat participants' status

A chat participant is able to see whether other chat participants are online, offline, or "Out of office". Hover the cursor over a chat participant who is "Out of office" to see their return date if they have entered any.

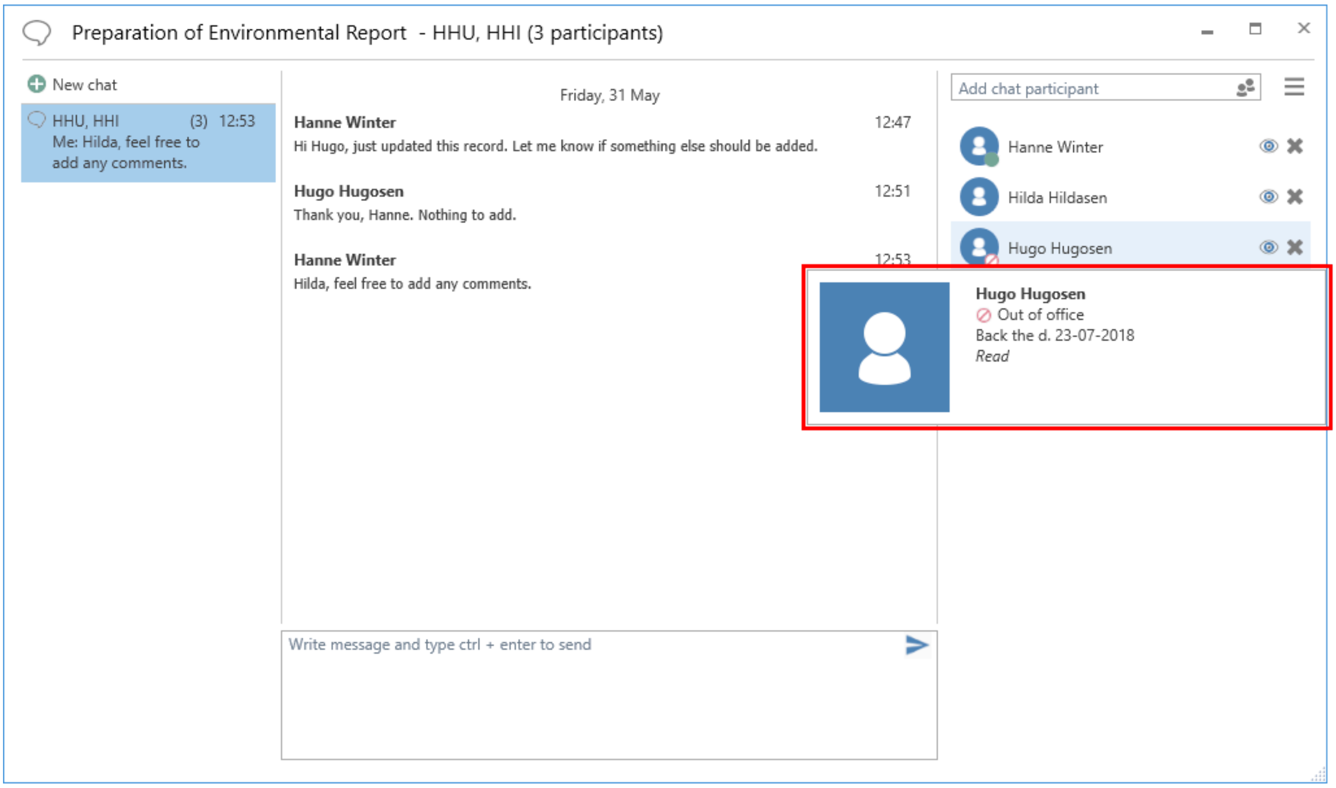


Figure 28. View chat participants' status

Remove participant from chat

To remove a participant from the chat, click the “remove” icon ✖ next to their name. While only the creator of the chat can remove themself from the participant list, all other participants can remove themselves as well as any other participants.

Write a chat message

To write a message, click the compose box in the lower part of the window.

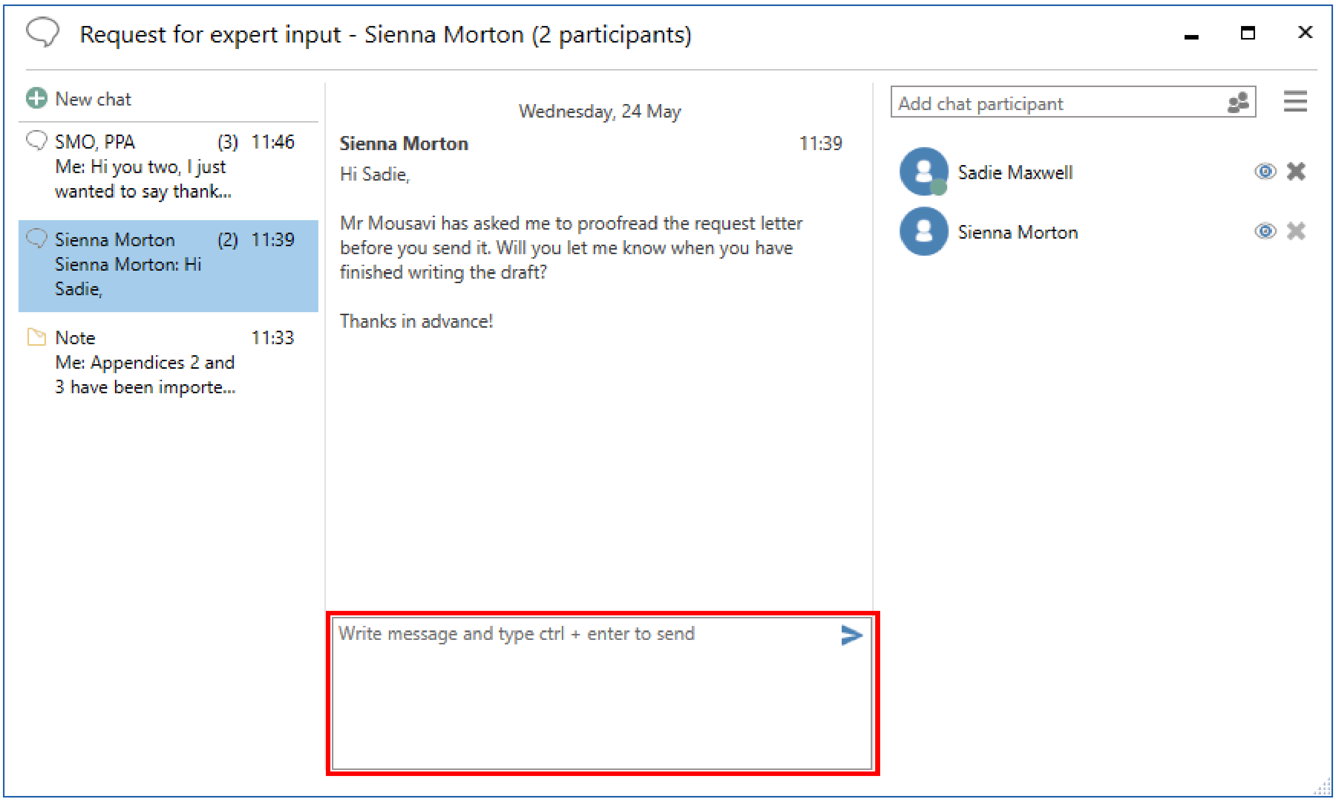


Figure 29. Compose a chat message

Send the message by clicking the “send chat” icon ➤ or pressing **Ctrl+Enter**. Previous messages from all users are displayed above the compose box.

Unsent chat messages are kept when the user cycles between chats or notes. If the user attempts to close the window while there are unsent messages, a warning dialogue appears. The chat window also remembers when the user adds participants to an unsaved chat.

When a chat is sent to one or more participants, its record appears as unread in their inboxes in F2. Read more about the receiving a chat.

When a participant has read the latest message in the conversation, the “read” icon appears next to their name.

Chat overview

The left side of the chat window displays the list of chats and notes in which the user involved. Both the chat titles and their participants are displayed. The number of participants is shown in brackets.

An unnamed chat will use the initials of the participants as its title. The full names of the participants are displayed in a tooltip. If there are only two participants on a chat, the other user's name is used as the title.

The list of chat participants is sorted after the latest chat message, i.e. the latest user to enter a message is the first one listed.

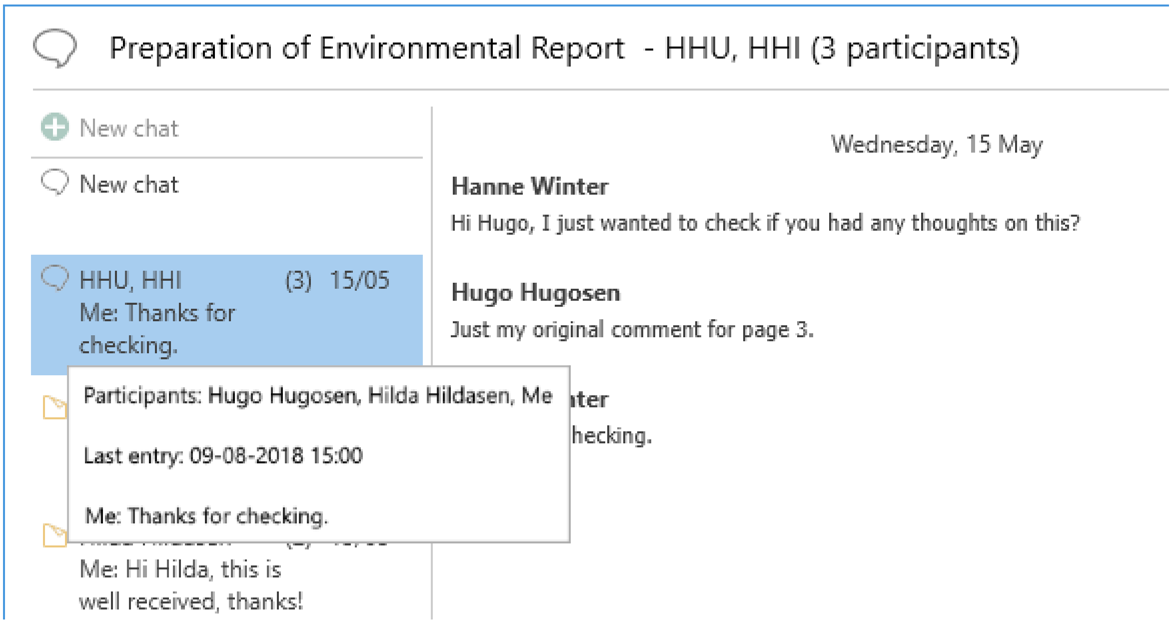


Figure 30. Participants' initials and full names in chat window

The functions of the chat window

The chat window's functions are found in the drop-down menu in its top right corner.

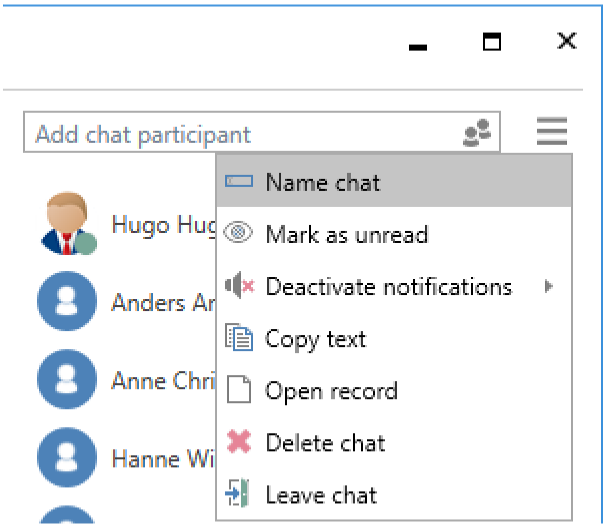
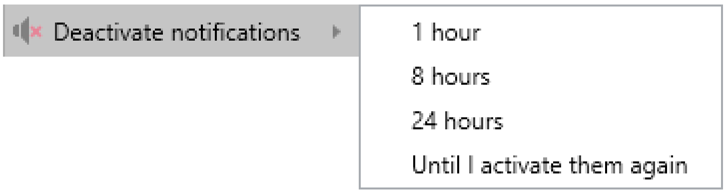


Figure 31. Chat window functions

The functions are described below.

Function	Description
"Name chat"	Opens a dialogue that lets the user name the conversation. This may be useful if there are several conversations on the record. The chat title is shown in the format "[Record title] - [Chat title]". If the chat has not been named, the participants' names are displayed instead of a chat title. If there are more than two participants, only their initials are shown.
"Mark as unread"	Mark the latest message as unread. When the user selects this function, the chat window will close and the unread chats icon appears on the record.
"Deactivate notifications"	Disables notifications for a given chat for one, eight or 24 hours, or until the user reactivates them.  *Figure 32. Options for deactivating notifications* Records with chats for which the user has deactivated notifications do not appear in the user's inbox if a new message is added within the selected period of time.
"Copy text"	Copies the entire conversation.
"Open record"	Opens the record to which the chat is linked.
"Delete chat"	Deletes the chat. Can only be done by the creator. F2 asks for confirmation when a user deletes a chat.
"Leave chat"	Leave the chat. **NOTE** Users who remove themselves from a chat that granted them access to an otherwise inaccessible record will no longer be able to access said record.

Receiving a chat

When a chat participant receives a message, the record to which the chat is linked appears in their inbox. The record title is shown in bold, and if the "Message icon" column is displayed in the result list, a chat icon with a blue circle is visible. This icon indicates a chat with an unread message. The blue circle disappears when all new chats have been opened and read. If the "Message icon" column is not displayed in the result list, it can be added.

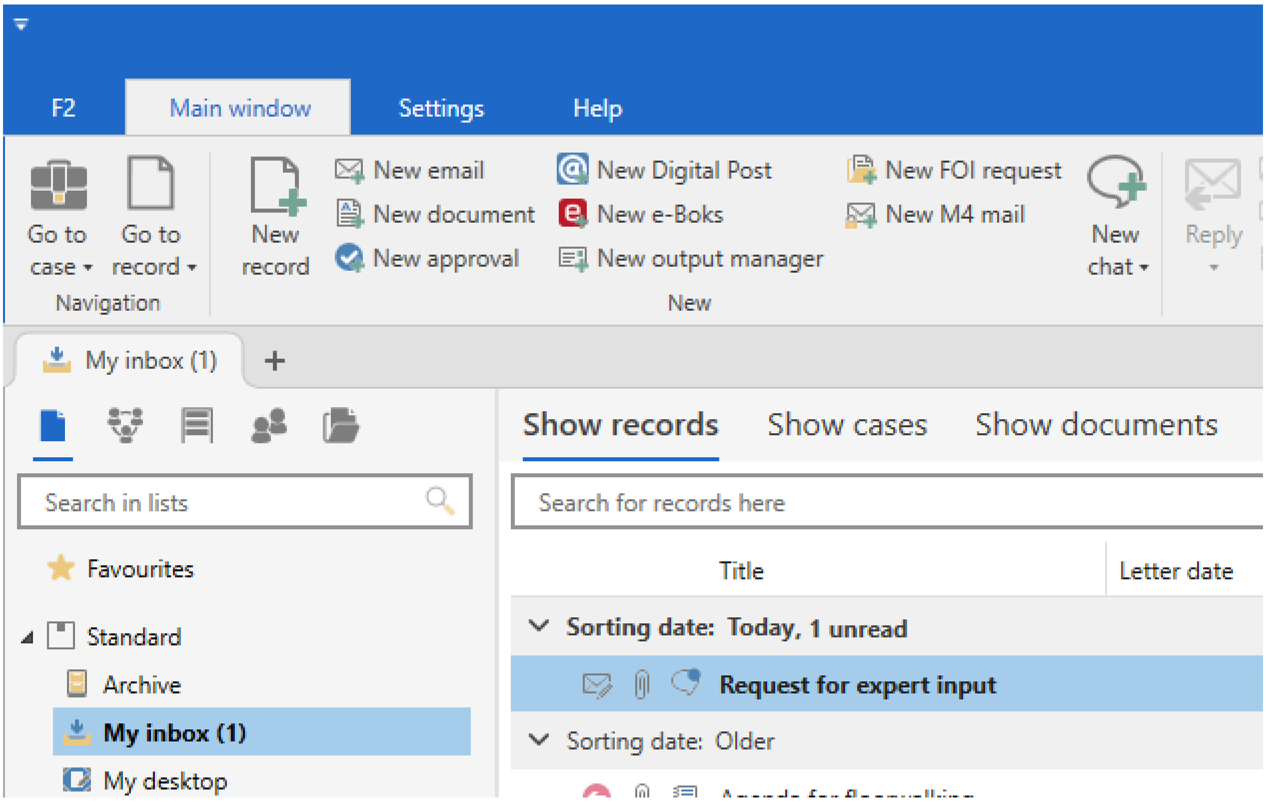


Figure 33. New chat in inbox

The chat message can be read by hovering the cursor over the chat icon as shown below.

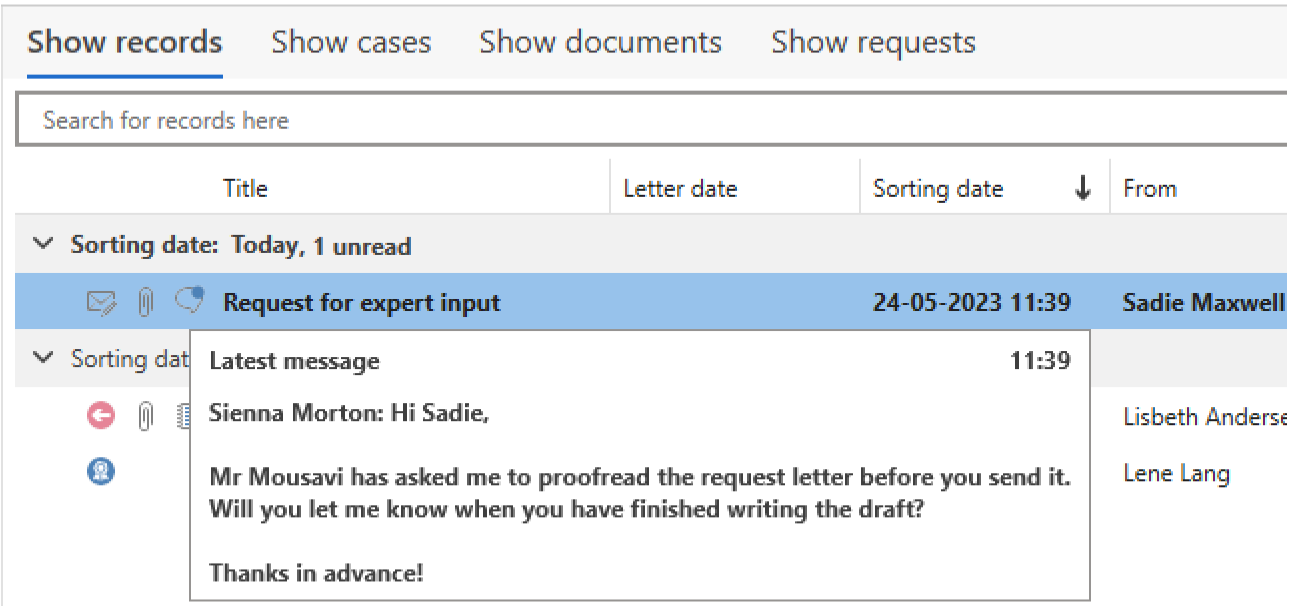


Figure 34. Tooltip showing chat message

If the main window preview is enabled, the chat icon is displayed above the record document. Click on the **chat icon** to view an excerpt of the chat content. If there are several chats on the same record, these are displayed below each other as shown in the example below.

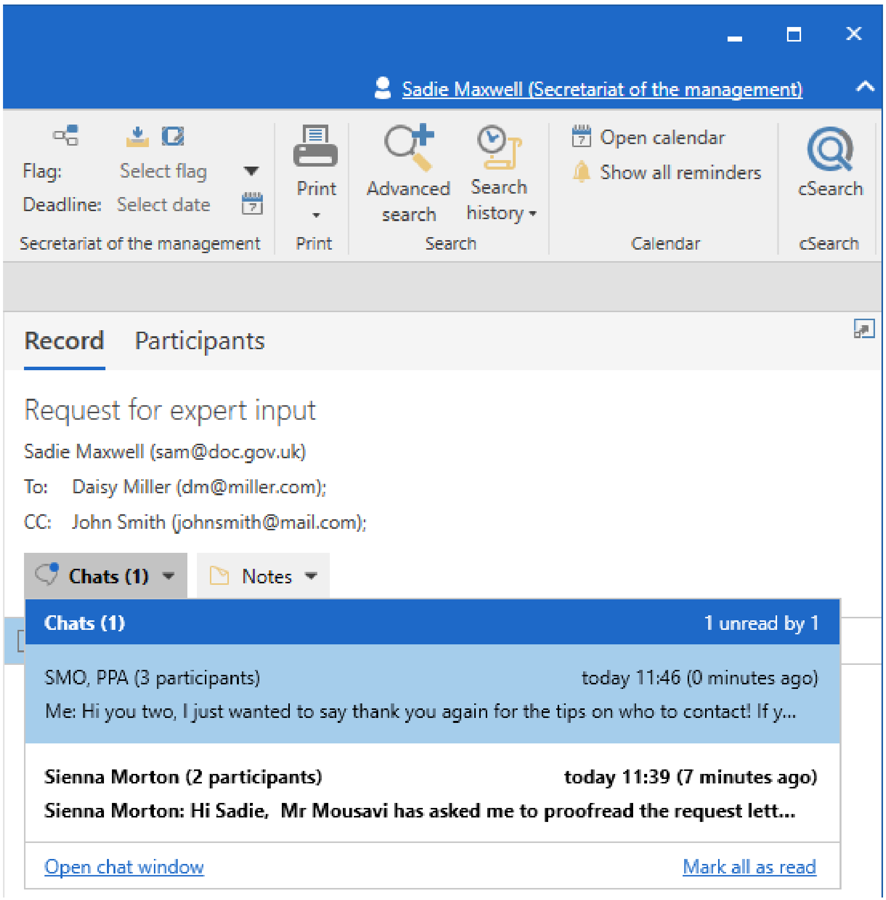


Figure 35. Preview of chats in the main window preview

In the record window chats are located above the document area near the upper right corner.

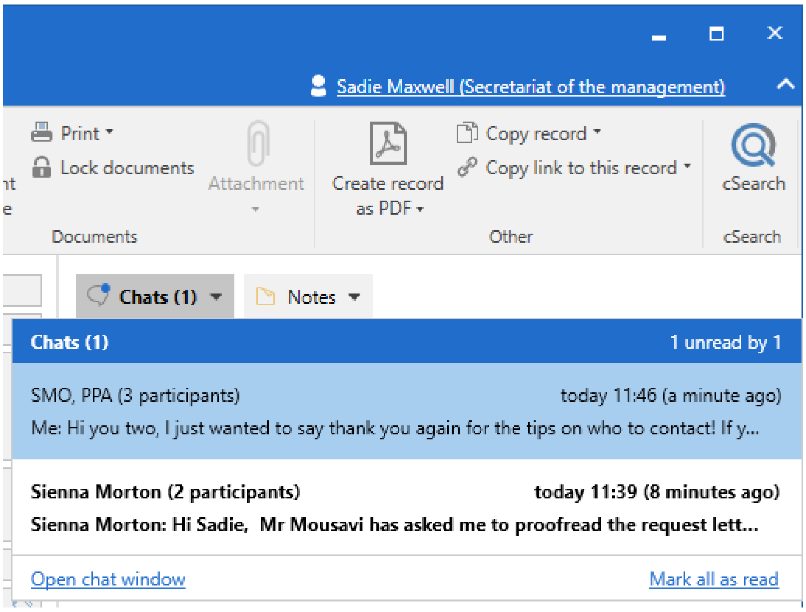


Figure 36. Chat preview in the record window

Hover the cursor over a chat to display a tooltip showing the entire content of the latest message. This is useful for particularly long messages. The tooltip is displayed for ten minutes.

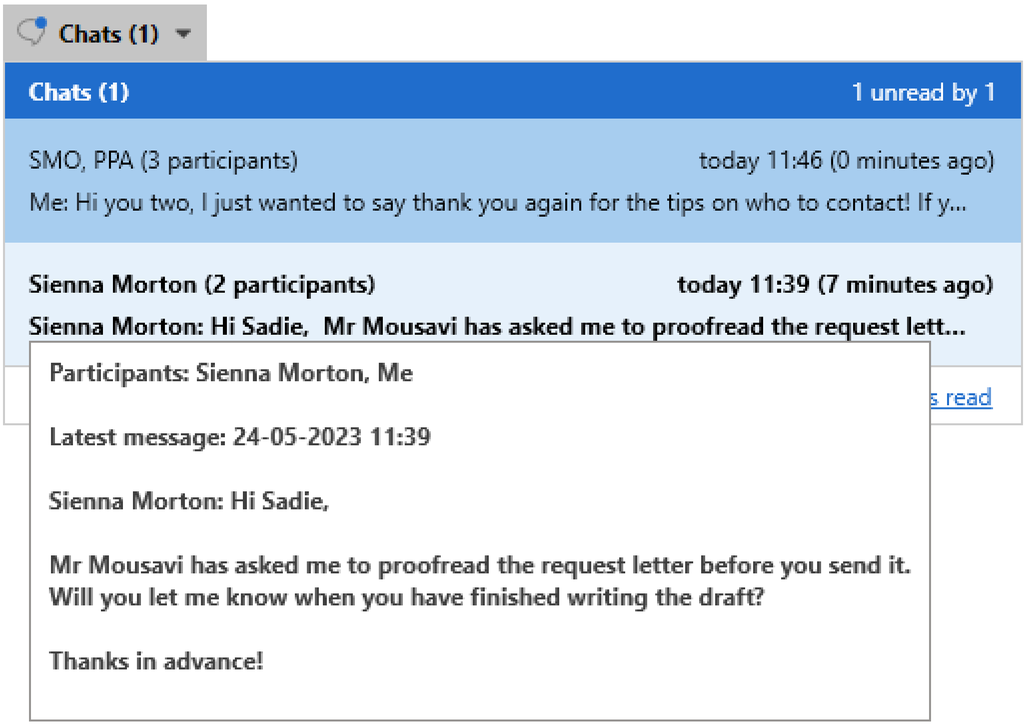


Figure 37. Chat tooltip in preview

Regardless of the user's current unit, it is always possible to check all chats in which they are a participant. Switching job roles is not required to read chat messages addressed to the user.

The read/unread indication is applied to the user across all of the units in which they have a job role.

The chat recipient's record access rights

When a record is shared through a chat, it is subject to the basic principles for user access rights to records. Unless the chat recipient already has a higher access right to the record, they are granted the access right one level lower than the chat creator.

This means that if a user with full write access to a record sends it to another user via a chat, the chat recipient receives write access to its documents. The access rights for chat recipients are listed in the following table.

Chat sender's access right	Chat recipient's access right
Full write access	Write access to documents
Write access to documents	Read access
Read access	Read access

NOTE A user's access right to a record will never be reduced via a chat.

Chat recipients gain access to the shared record depending on the access level on the record and the access right of the chat sender.

Example 1: Henry in HR creates a record which is automatically assigned the access level "Involved". Henry sends a chat to his colleague, Hugo, on the record. Because Hugo becomes involved through a chat, his access right to this record is governed by the above table: Hugo gains write access to the record’s documents.

Example 2: Now Henry expands the record’s access level to “Unit”, in this case HR. He adds his HR colleague, Hilda, as a chat recipient. If Hilda were only a chat recipient, she would have gained write access to the record’s documents, but since Henry has changed the record’s access level to “Unit”, Hilda already has full write access to the record. In this case, Hilda’s access right to the record is not affected by her being a chat recipient - only the highest level of access granted a user applies.

Example 3: Henry expands the access level again, this time to “All”, before sending a chat to Ann in Administration. The new access level grants all users in the authority read access to the record. Ann, being a chat recipient, is also granted write access to its documents. Hilda and Hugo are unaffected by the new access level and retain full write access.

NOTE	Access levels may change when a user is placed in a new unit or if a new user becomes responsible for the record.

Chat to all

The “New chat to all” function can be used on emails to create a chat to all involved participants.

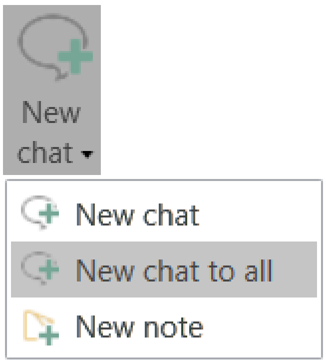


Figure 38. Create “New chat to all” in the main window

Instead of manually entering participants from the “From”, “To”, and “Xbc” fields in a new chat, click on **New chat to all.**

F2 then creates a chat in which all participants on the email are added as chat recipients.

Click on **New chat to all** to add the following participants to the chat:

- Sender of the email
- Recipient(s) of the email
- Cc recipient(s) of the email
- Xbc recipient(s) of the email.

This function is available from both the main window and the record window ribbon.

NOTE	Only internal F2 participants, and not external participants, are added to the chat.

Notes

As with the chat, a note is an informal way of communicating in F2. A considerable difference is that all users with read access to a record are also able to see its notes. In addition, a note cannot be deleted automatically, but remains on the record unless a user with the “Can delete notes” privilege deletes it.

Notes can be added to both records and cases without entering edit mode. Notes can also be added to records and cases that are completed. There is no limit to the number of notes that can be added to a record or case.

Participants can also be added to a note, but only on records. When a participant is added to a note, it appears with the record to which it is linked in the participant’s inbox. Adding participants to a note may be useful e.g. when a user adds a telephone memo to an email and wants to inform other users about this via their inboxes.

NOTE Deleting notes requires the “Can delete notes” privilege.

Create a note via the main window

You can add notes to records directly from the main window - i.e. without opening the actual record.

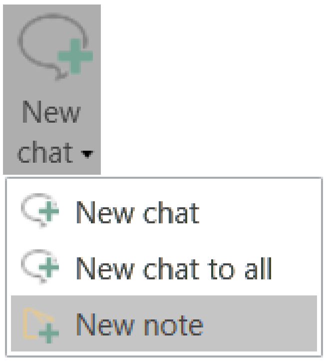


Figure 39. Create a new note in the main window

In the main window, click on **New note.** The menu item **New note** is found in the drop-down menu of **New chat**. This opens the note window for the selected record, and the user can enter text and add recipients.

Create a note via the record window

In the record window ribbon, click on **New note** in the “New” menu group. This opens the note window, and the user can enter text and add recipients.

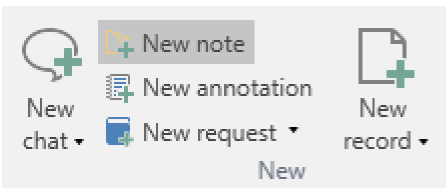


Figure 40. Create a new note in the record window

Create a note via the case window

In the case window ribbon, click on **New note** in the case window ribbon. It is not possible to add participants to a note on a case.

Figure 41. Create a new note in the case window

Read more about notes on cases.

The record's note window

Enter the note text in the compose box at the bottom of the window and click on the "send note" icon  or use the keyboard shortcut **Ctrl+Enter** to send.

The note text will then appear above the compose box as shown below.

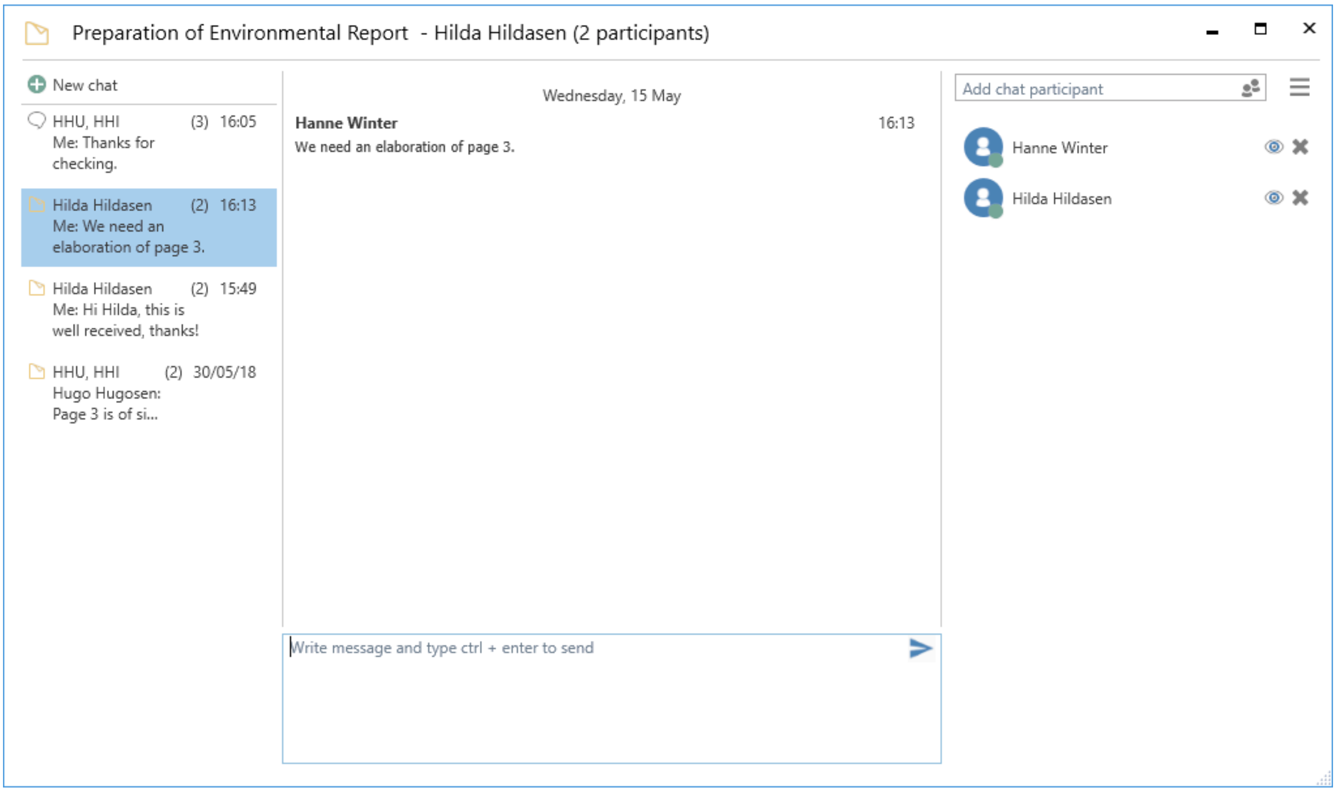


Figure 42. The record note window

If a record has multiple notes or conversations, a list is shown to the left in the window.

The following sections present the functions of the note window. These differ in some ways from the note functions available on case notes.

Add note participants

Recipients can be added to a record note. These are added the same way as chat recipients. See the The chat window section.

When a note recipient is added, their name is shown in the participant list to the right-hand side of the window. Added participants can add additional users to the note. If a user has a profile picture, it is displayed in the note participant list.

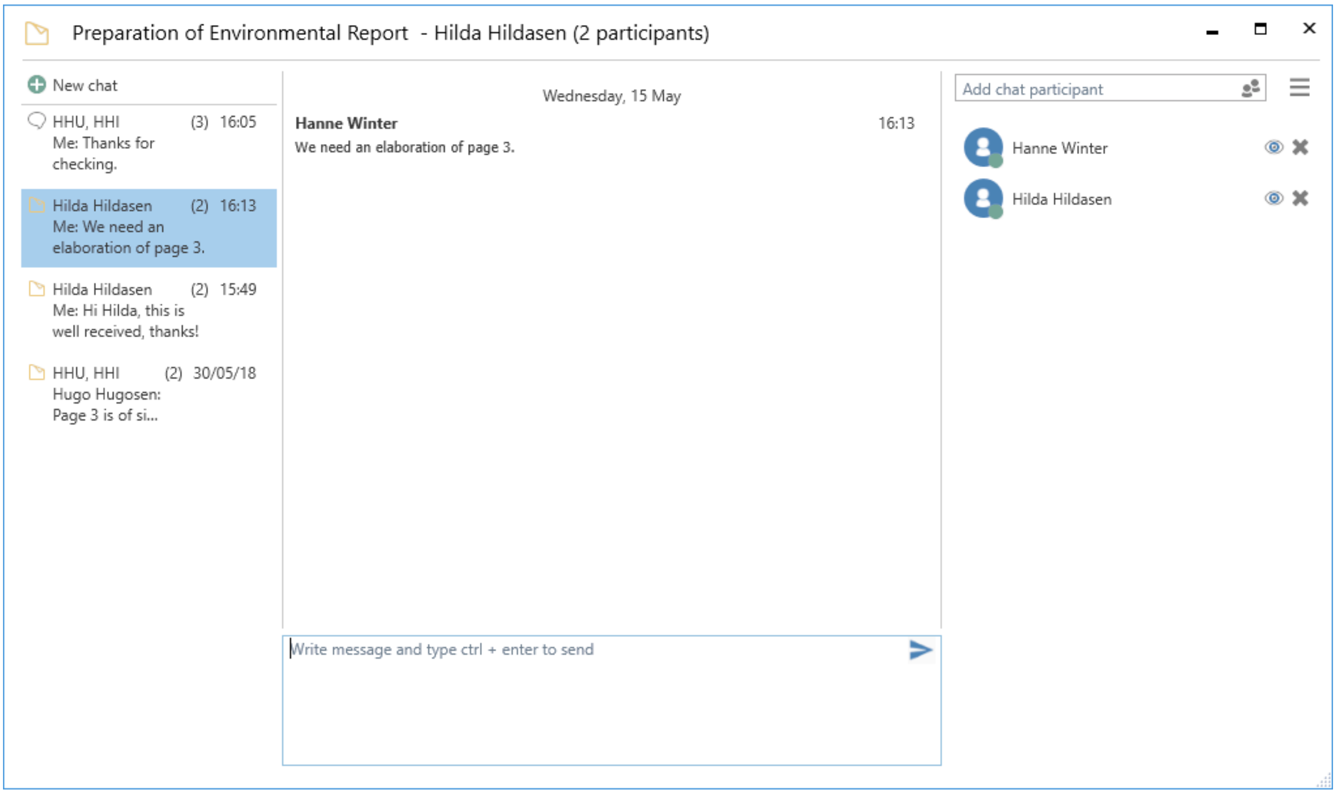


Figure 43. Note participants

When a note is sent to one or more participants, its record appears as unread in their inboxes in F2.

When a participant has read the latest note text, the “read” icon appears next to their name.

To remove a participant from the note, click the “remove” icon next to their name. While only the creator of the note can remove themself from the participant list, all other participants can remove themselves as well as any other participants.

The functions of the note window

The note window’s functions are found in the drop-down menu in the top right of the note window.

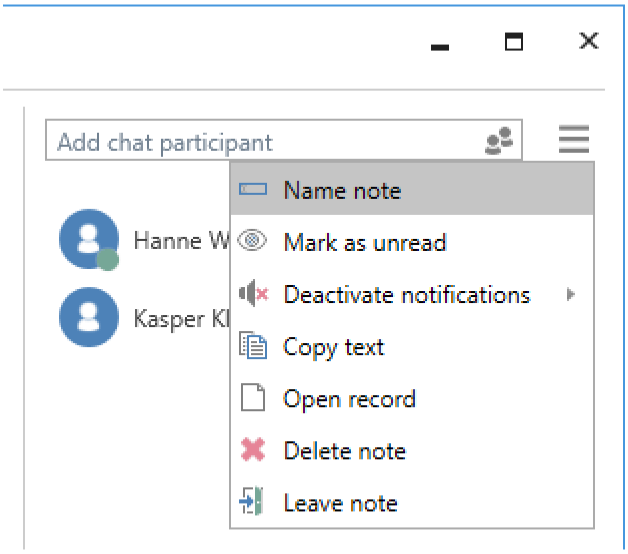
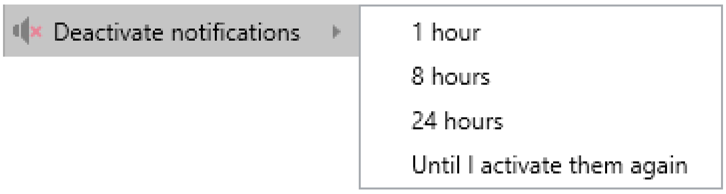


Figure 44. The record window's note functions

These functions are described below.

Function	Description
“Name note”	Opens a dialogue that lets the user name the note. This may be useful if there are several notes on the record. The chat title is shown in the format “[Record title] - [Note title]”. If the note has not been named, the participants' names are displayed instead of a note title. If there are more than two note participants, only their initials are shown.
“Mark as unread”	Mark the latest note message as unread. When the user selects this function, the note window will close and the unread notes icon appears on the record.
“Deactivate notifications”	Disables notifications for a given note for one, eight or 24 hours, or until the user reactivates them.  *Figure 45. Deactivate notifications* Records with notes for which the user has deactivated notifications do not appear in the user’s inbox if a new message is added within the selected period of time.
“Copy text”	Copies the entire note text.
“Open record”	Opens the record to which the note is linked.
“Delete note”	Deletes the note. Requires the “Can delete notes” privilege. F2 asks for confirmation when a user deletes a note.
“Leave note”	Leave the note. **NOTE** Users who remove themselves from a note that granted them access to an otherwise inaccessible record will no longer be able to access said record.

Receiving a note

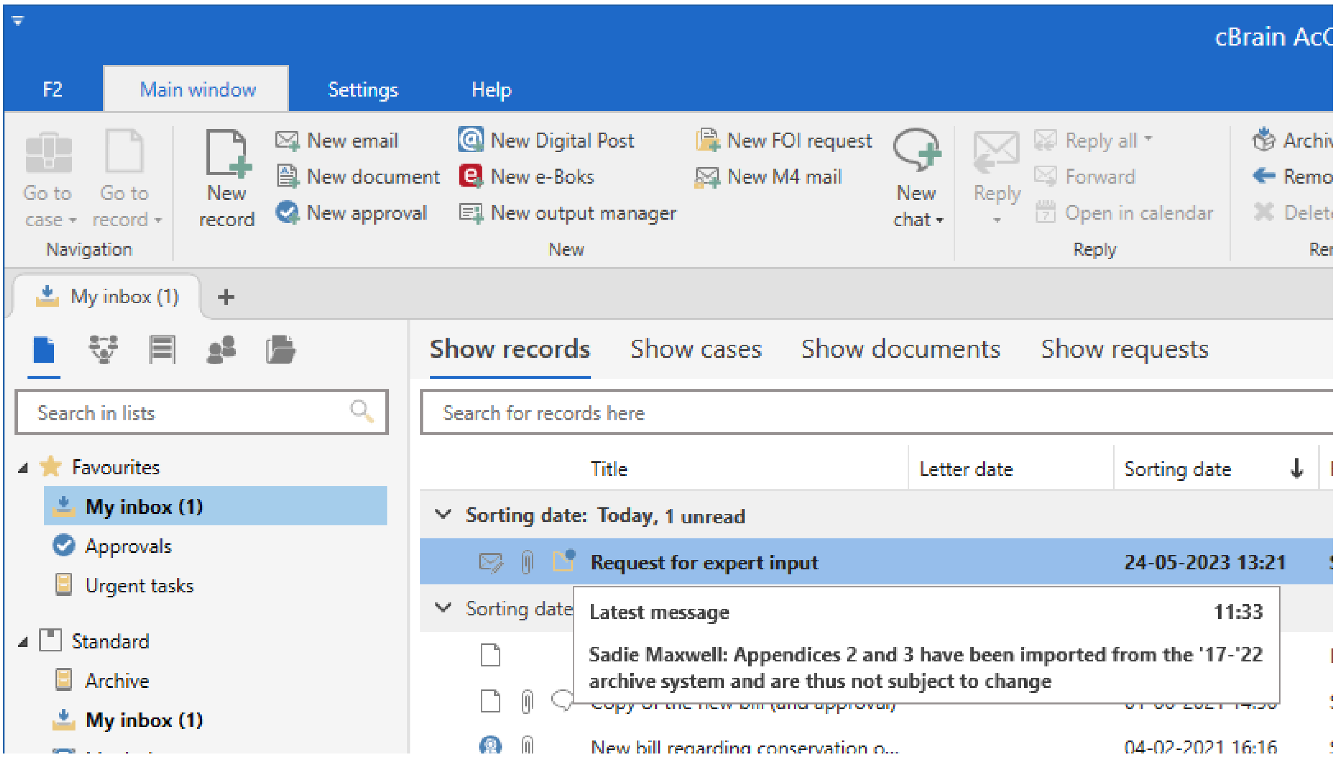


Figure 46. Unread note in the inbox

Double-clicking the icon opens the note directly.

Notes can also be opened from the main window preview as shown below.

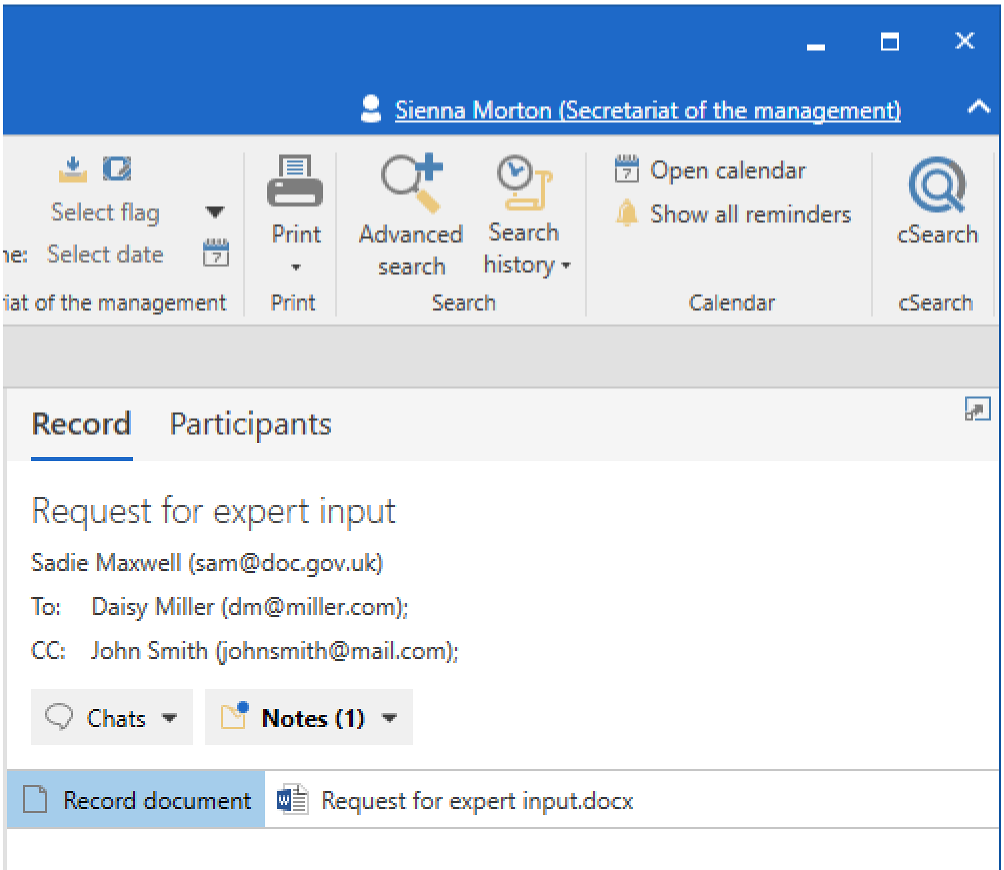


Figure 47. Open note from main window preview

In the record window the note is found above the document area to the right, as shown below. Click the **note icon** to view the note text as a drop-down box. Click the note text to open the note window.

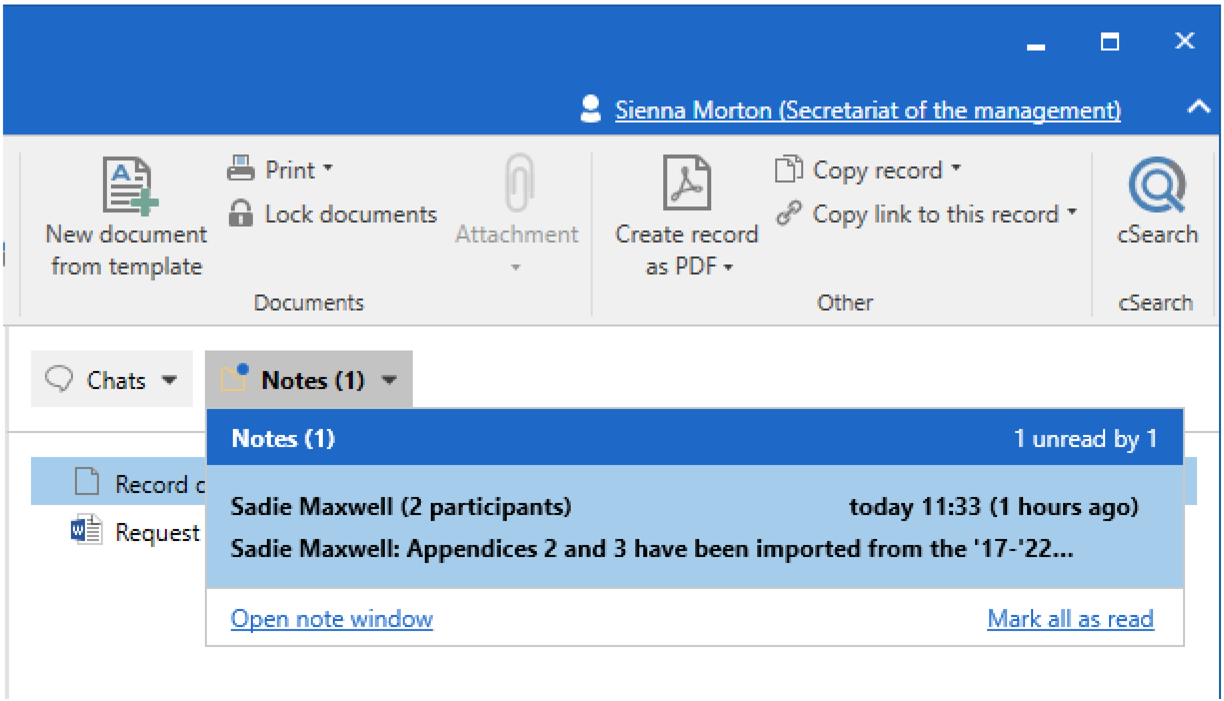


Figure 48. Note in record window

Record access rights of note participants

As with a chat, note participants receive access rights depending on certain conditions. See the access levels in the section The chat recipient's record access rights.

Allocation of responsibility

The allocation concept is a central feature of F2. It can be thought of as a digital version of an organisation's physical mail distribution in which incoming mail pertaining to formal cases are allocated to units or users without using the email function.

Organisations with a central postal unit scanning letters may have this unit allocate responsibility for letters to other units which in turn may allocate/distribute them to individual users. The selected unit or user will then have responsibility for the record.

The responsible participant

The allocation of responsibility typically means that the formal responsibility lies with a specific unit or user, the responsibility of the unit being derived from one of its users.

All records that are created in F2 or imported via an email system are born with an allocation of responsibility, either to the user or to the unit creating or receiving the record. The record manager can always allocate the responsibility of the record to another user or unit.

If responsibility for a record is reallocated, the record appears in the inbox of the newly appointed responsible user or unit.

NOTE	When a user allocates the responsibility for a record to themself, the record does not appears in the user's personal inbox. To add a record to the personal inbox, click the icon in the record ribbon. Read more about personal record management.

When the responsibility for a record is reallocated, the following happens:

- If a unit is inserted in the "Responsible" field, the record will appear in the unit's inbox and no longer appear in the user's "In process: Me" list.
- If a new user is inserted in the "Responsible" field, the record will appear in their inbox. F2 automatically adds the "Responsible unit" based on the user's affiliation. This lets records whose responsibility rests with specific users appear in the "In process: Unit" list and makes it possible for users to sort F2's result list using the "Responsible unit" column.

Reallocate responsibility

In order to reallocate the responsibility for a record, it must be in edit mode. Enter a new user or unit in the "Responsible" field and click **Save**.

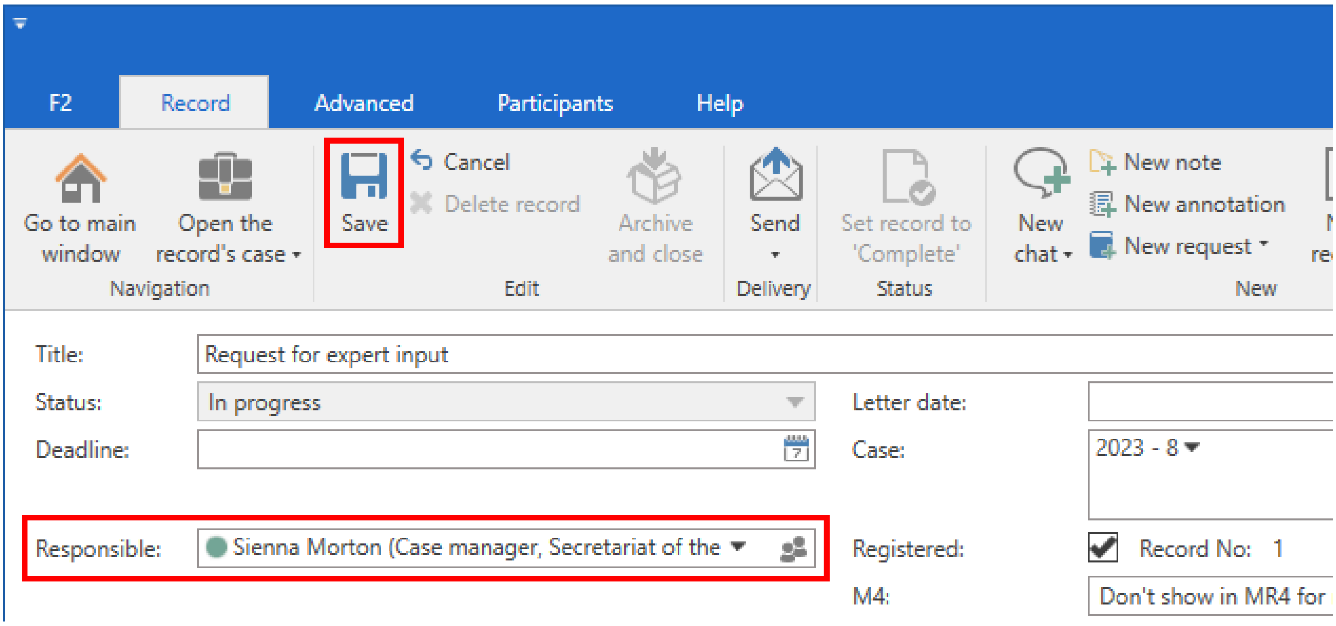


Figure 49. Reallocating responsibility

When the record is in edit mode, the participant icon appears in the “Responsible” field. Clicking on the icon opens F2’s participant register in which a user or unit may be found via the “Choose participants” dialogue.

NOTE Suggestions in the “To”, “Cc”, and “Xbc” fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

The record creator’s access when reallocating responsibility

The record creator may lose write access when reallocating the responsibility. This happens when the responsibility for a record is reallocated to a user in another unit, for example. The new user receives full write access to the record, while the record creator retains read access only. As a consequence, reallocating the responsibility of a record to another unit or user cannot be undone as the reallocating user loses full write access to the record in the process.

However, if the user or unit in the “Responsible” field is removed, the full write access reverts back to the record creator. The “Participants” tab in the record window shows both the currently responsible user or unit as well as the record’s creator.

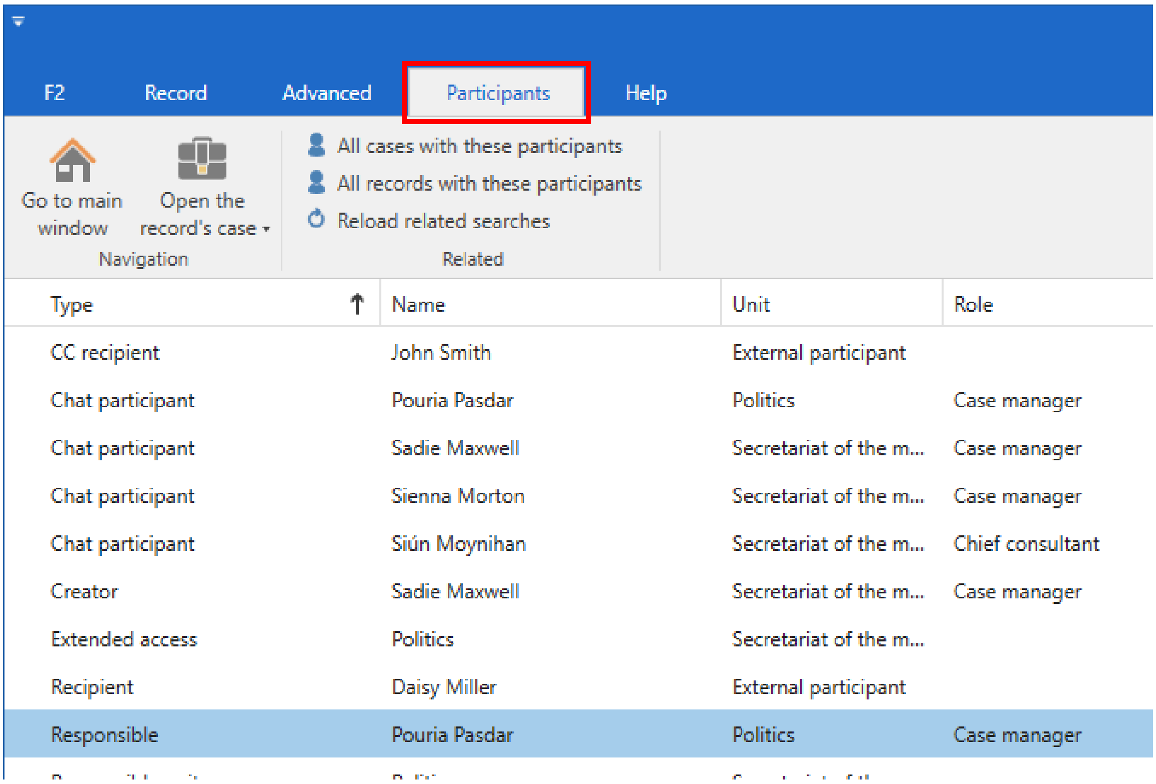


Figure 50. The “Participants” tab

NOTE A user who is removed from a record’s “Responsible” field will also lose read access if no other circumstances grant the user access. For records with the access level “Involved”, this means that only the users/units currently involved in the record have read access to it.

Supplementary case manager

The “Supplementary case manager” field is used for appointing users, units, teams and/or distribution lists to assist with processing a record or case without being directly responsible. Any supplementary case managers remain unchanged when the responsibility for a record is reallocated.

Adding a supplementary case manager

In order to add a supplementary case manager, the record or case must be in edit mode. Add a user, unit, team and/or distribution list to the “Suppl. case mgr.” field and click on **Save**.

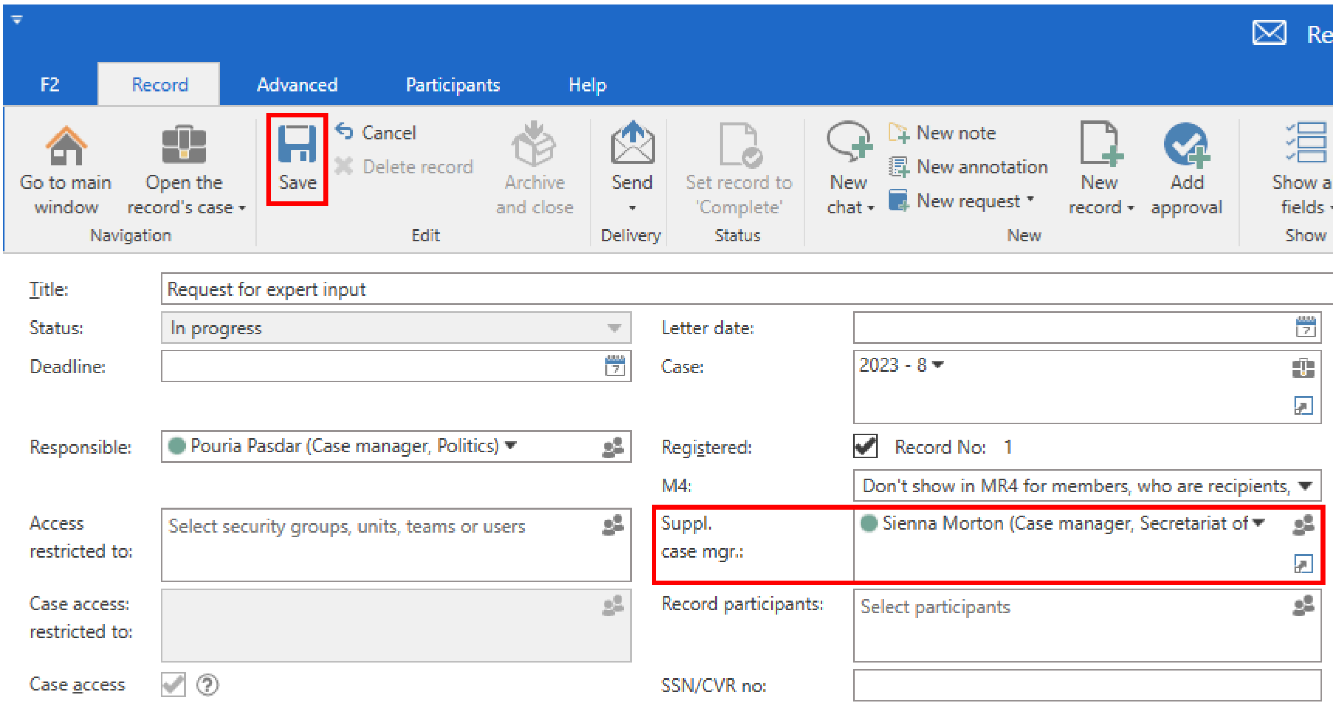


Figure 51. Add supplementary case manager to record

When a user or unit is added as a supplementary case manager to a record, it appears in the user’s or unit’s inbox.

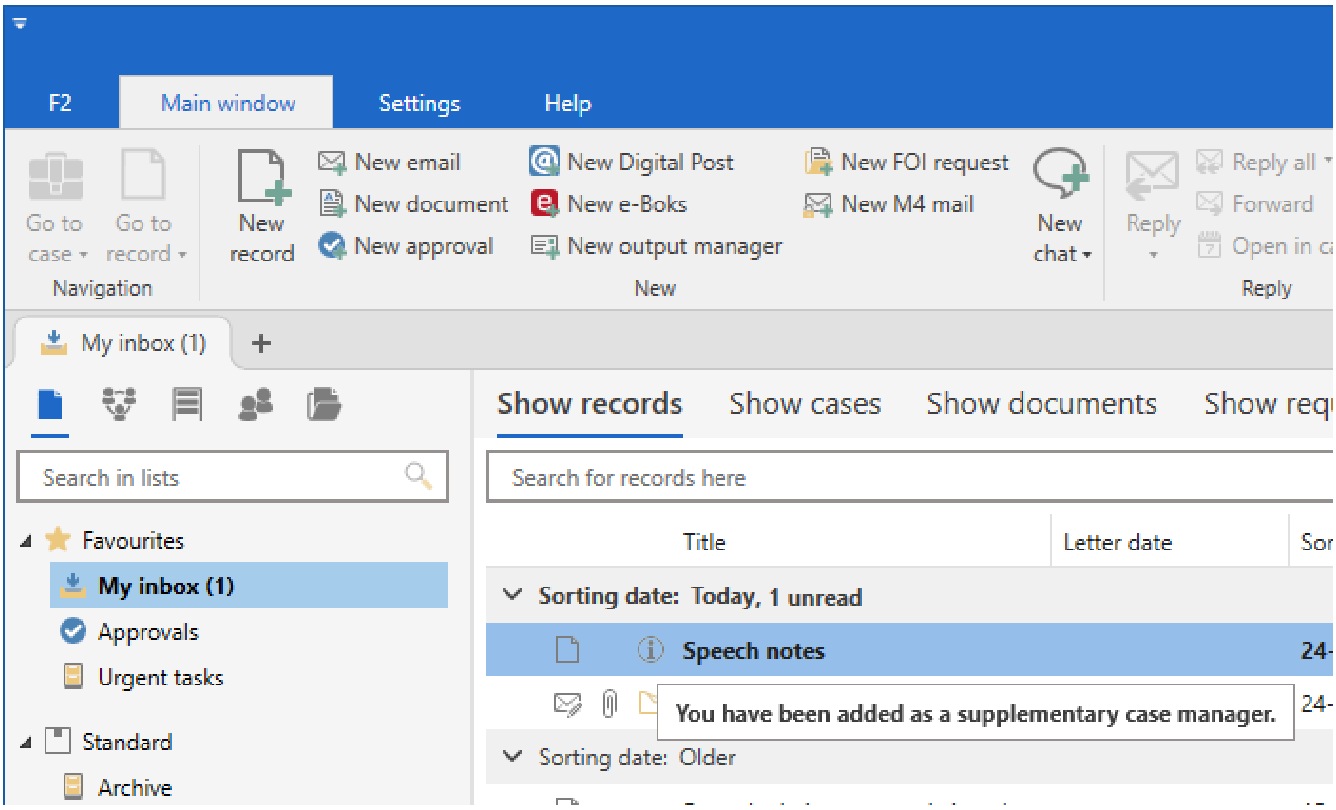


Figure 52. Supplementary case manager notification in inbox

Users will see the info icon ⓘ next to the record, indicating that they have been added as a supplementary case manager.

Access rights for supplementary case managers

In the record window it is possible to add a user/unit/team/distribution list as a supplementary case manager.

The supplementary case manager's access rights are based on what is defined in the responsible user's personal setup.

It is possible for the responsible user or unit to change the access rights to a record. Three levels exist:

- **Read access**: The supplementary case manager or unit has read-only access to the record.
- **Write access to documents**: The supplementary case manager or unit can edit the documents attached to the record (including the record document), but not its metadata.
- **Full write access**: The supplementary case manager or unit can edit the documents attached to the record (including the record document) as well as its metadata.

By default, the access right for supplementary users and units is "Full write access".

A supplementary case manager's access rights can be viewed and changed by right-clicking the participant. In the context menu, select "Access rights for the record". Here, the current access rights are shown and may be changed.

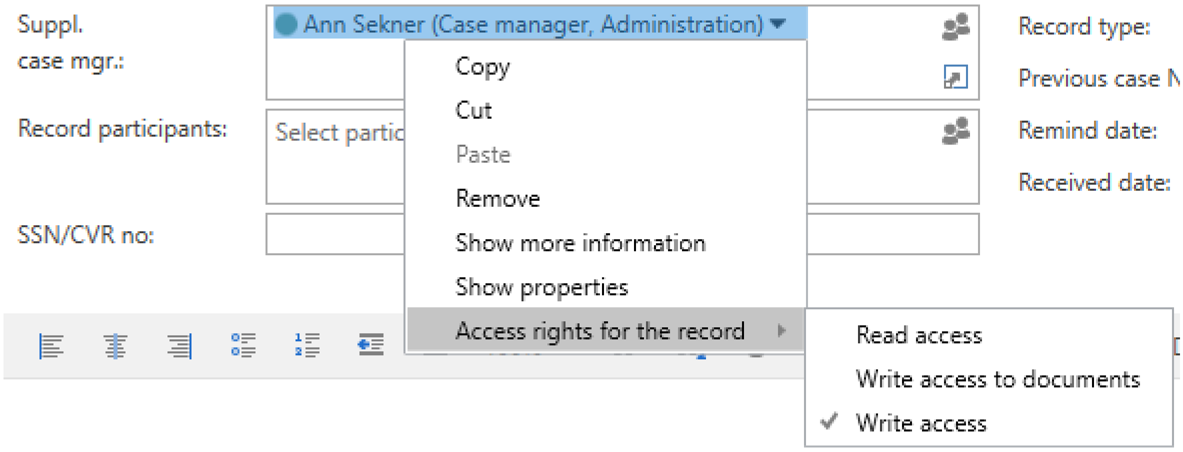


Figure 53. View access rights for supplementary case manager

NOTE

A user who is removed from the “Suppl. case mgr.” field on a record will also lose read access if no other circumstances grant the user access. For records with the access level “Involved”, this means that only the users/units currently involved in the record have access to it.

Annotations

An annotation is a formal comment that is added to a record or a case. This function is typically used if senior employees must annotate others' work or when an employee wishes to annotate a record or case with formal information.

The annotation is visible to all users with access to the record or case.

The annotation is a type of formal communication and cannot be deleted. This sets it apart from chats and notes.

NOTE If an organisation periodically delivers its documents to e.g. the National Archives, any annotations are included in the delivery.

Create annotation

On the record ribbon, click **New annotation** to open the dialogue below.

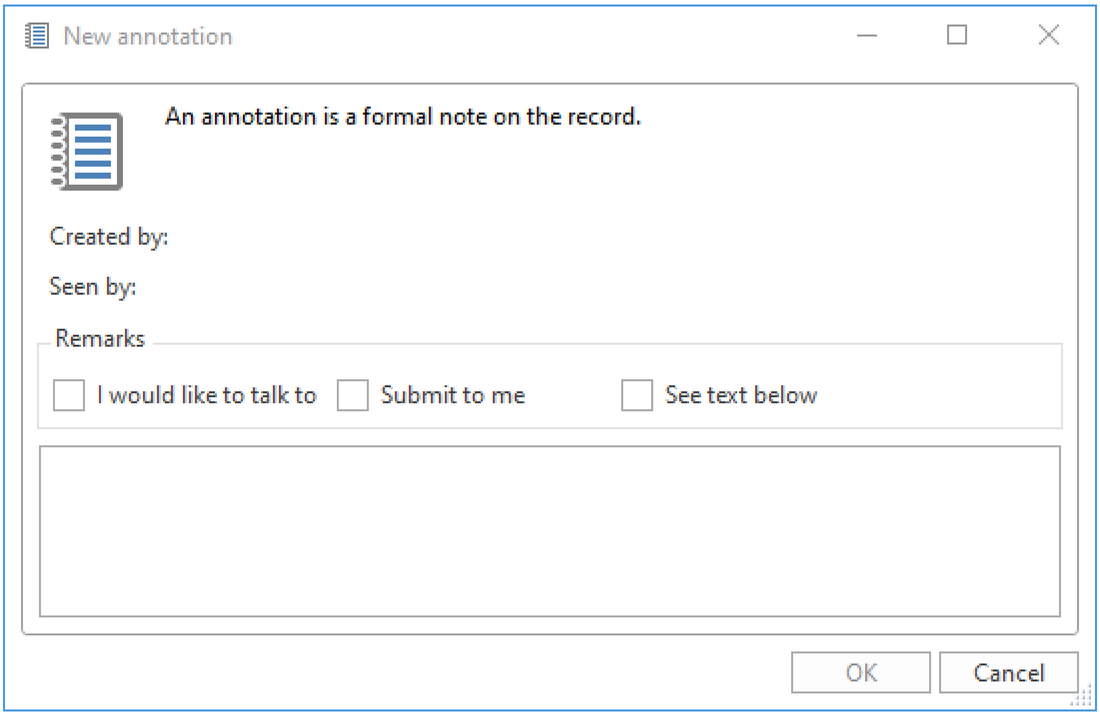


Figure 54. "New annotation" dialogue

Tick off one or more annotation types. The annotation type options can be configured and is maintained by a user with the "Value list administrator" privilege, so dialogue content may vary.

If needed, add an annotation text in the editing pane to elaborate.

Click **OK** to save the annotation.

Access an annotation

The annotation icon is shown on the record above the document area. A blue circle is shown on the icon if the annotation is unread.

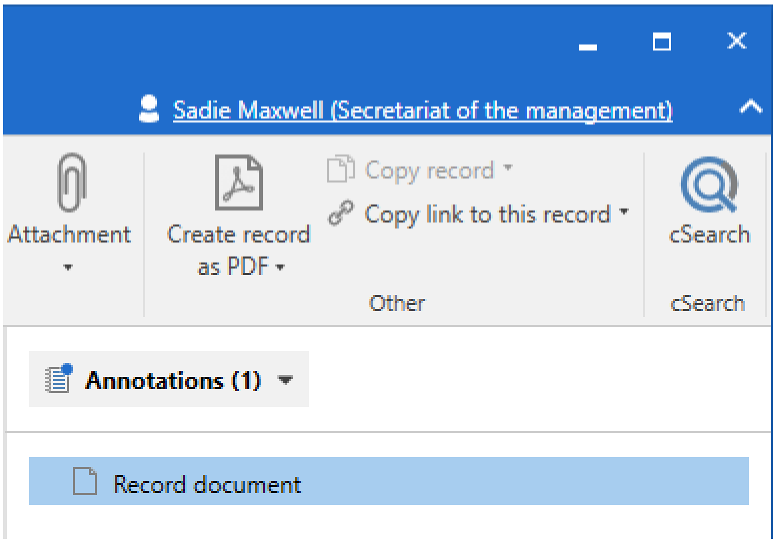


Figure 55. Annotation on the record

An annotation is accessed from either the record window or the main window. Click the annotation icon to view its text in a tooltip. Click the text to go to the annotation window.

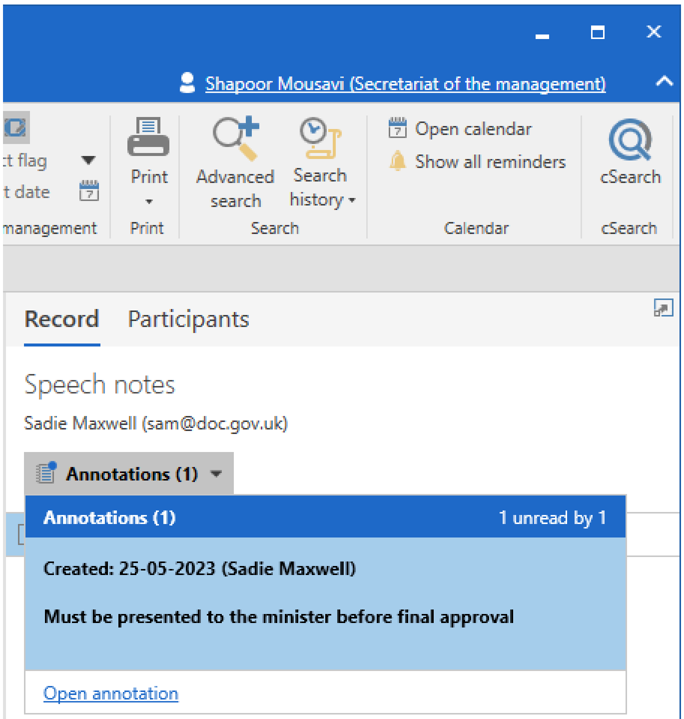


Figure 56. Access annotation

An annotation may be accessed from the main window without opening the record. Either double-click the annotation icon in the result list, or open the annotation from the main window preview.

The annotation text can be viewed in the result list via the annotation icon tooltip.

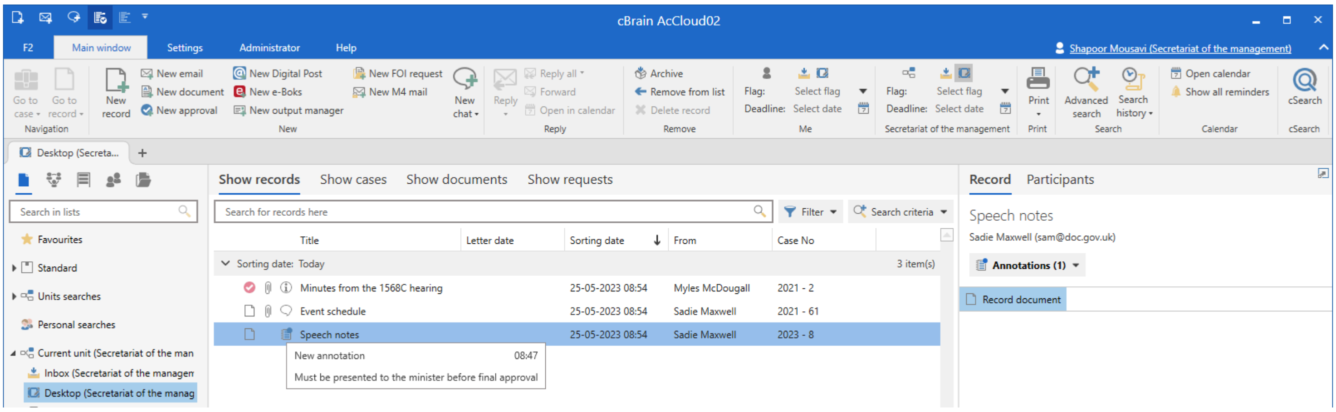


Figure 57. Access annotation from the main window

Mark annotation as seen

An annotation is marked as seen by opening the annotation window and clicking the **Seen** button.

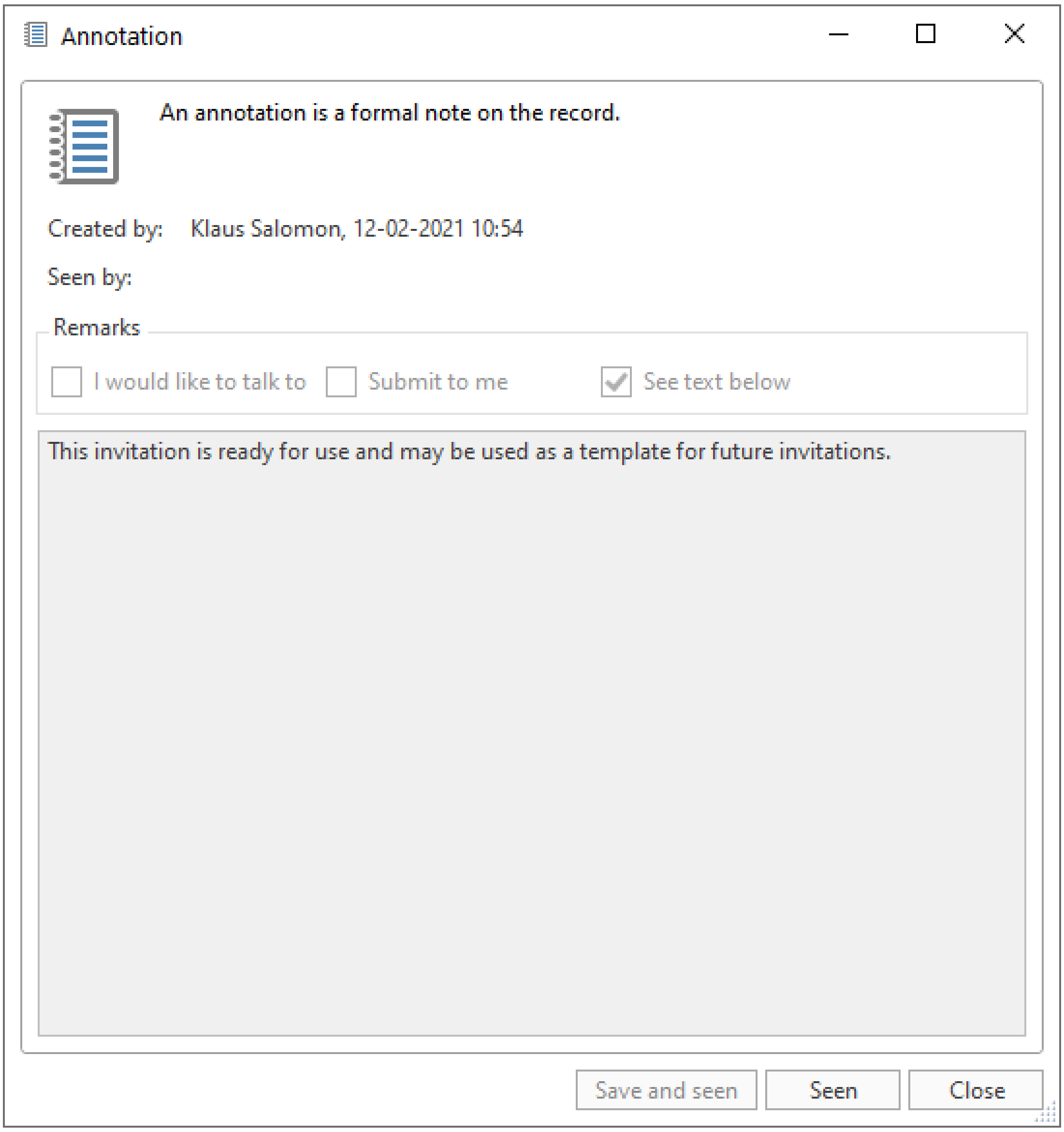


Figure 58. Mark an annotation as seen

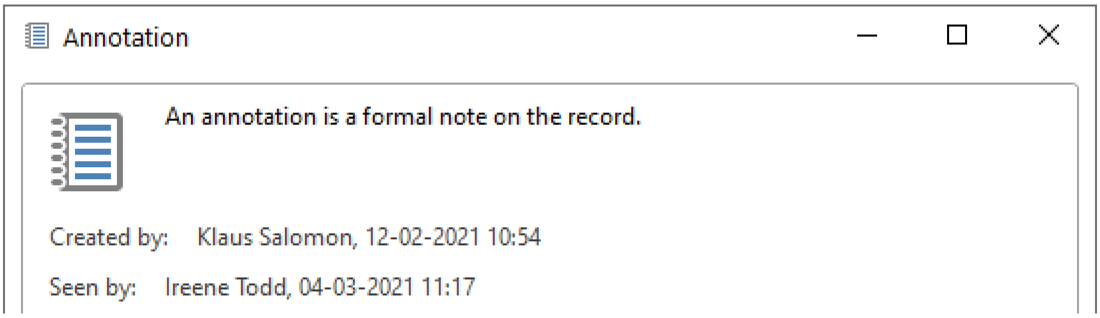


Figure 59. Annotation seen by user