FOI request, advanced

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Introduction to F2 FOI Request, Advanced

The add-on module F2 FOI Request, Advanced makes it possible to create an FOI request report.

The FOI request report collects material from selected cases, records, and documents. The module supports the entire process - from the received FOI request to the finished FOI request report.

The first step of generating an FOI request report is selecting the relevant records. The contents of the report can then be adjusted by deselecting individual FOI request elements before creating the final version.

F2 FOI Request, Advanced ensures a complete overview so that the requester can see if anything has been left out.

A comment can be added to each FOI request element. This makes it possible to document why parts of the material may have been excluded.

The "FOI" tab in the case window

This section provides a short introduction to the "FOI" tab in the case window. The top of the case window contains the case number and title of the FOI request case.
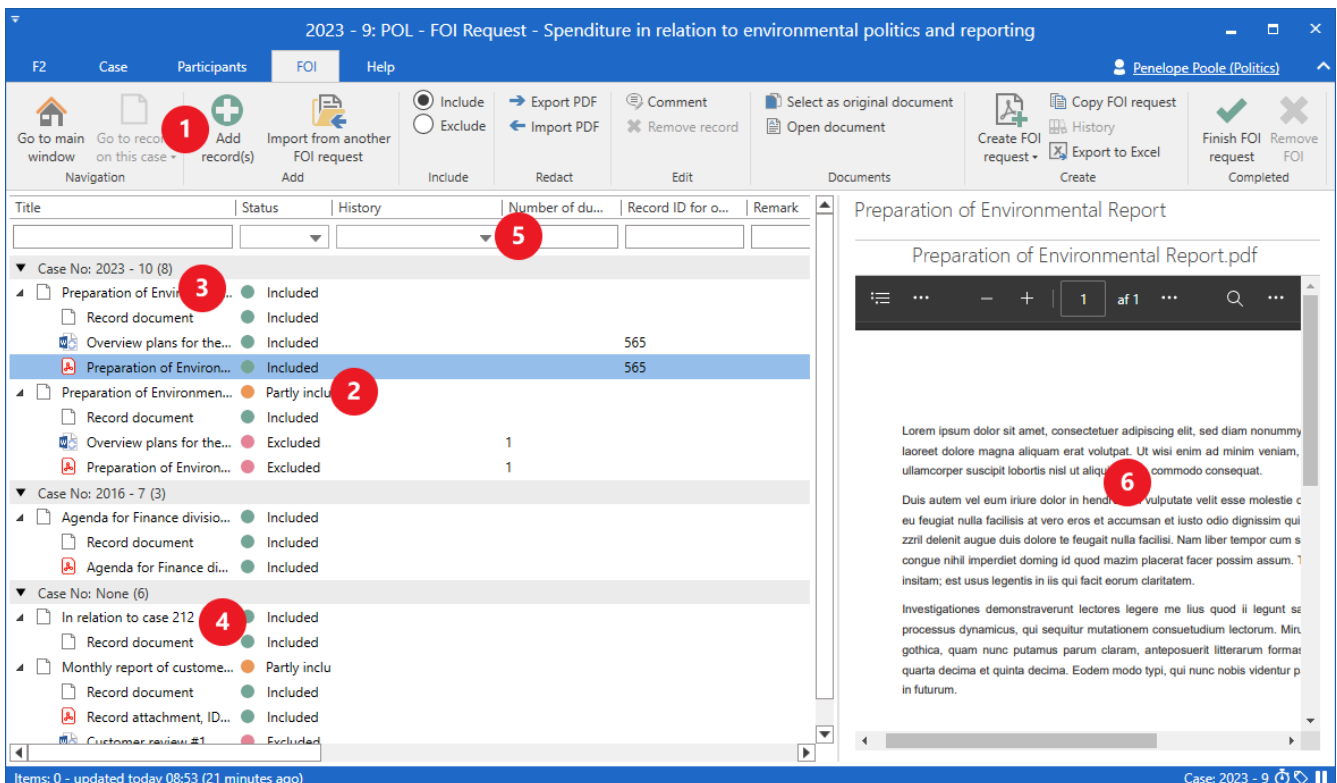

Figure 1. The "FOI" tab in the case window

Working with FOI requests is done primarily on the case window's "FOI" tab. Here you will find:

- The ribbon containing menu items for navigation, communication, and managing the FOI request (1).

- The result list of the "FOI" tab. The list contains the FOI request elements that make up the basis of the request. It is possible to see which elements have been included and excluded in the FOI request (2).

- The FOI request elements grouped by case number (3).

- A separate group of records without cases (4).

- The columns of the result list that you can customise. Use the content filters below the column titles (5) to filter the displayed content, e.g. by entering text or selecting an option from a column's drop-down menu.

- A preview of the selected FOI request element is shown to the right (6).

Create and adjust FOI request reports

The module assists the user in choosing which elements to include in the FOI request report. The following actions are available:

- Add content to the FOI request report on an ongoing basis using searches or existing FOI request reports.

- Include, remove, or edit FOI request elements such as documents, annotations and requests, add comments, and extract sensitive information.

- View active and finished FOI request reports in the main window.

- Save and send FOI request drafts for internal approval.

Choose level of detail for the report

F2 FOI Request, Advanced automatically generates a complete FOI request report once all relevant FOI request elements have been selected. The detail level of the report can be adjusted. For example, attached documents may be given individual titles or the report can be adjusted so it contains all relevant metadata and documents.

Create new FOI request

To create a new FOI request case: Select one or more records in the main window's result list by holding down the **Ctrl** key while clicking on the relevant records. Then click on **New FOI Request** in the main window's ribbon or in the context menu select **New** and then **New FOI request**.

It is not necessary to find all the needed records before generating the FOI request case as records can also be added later.
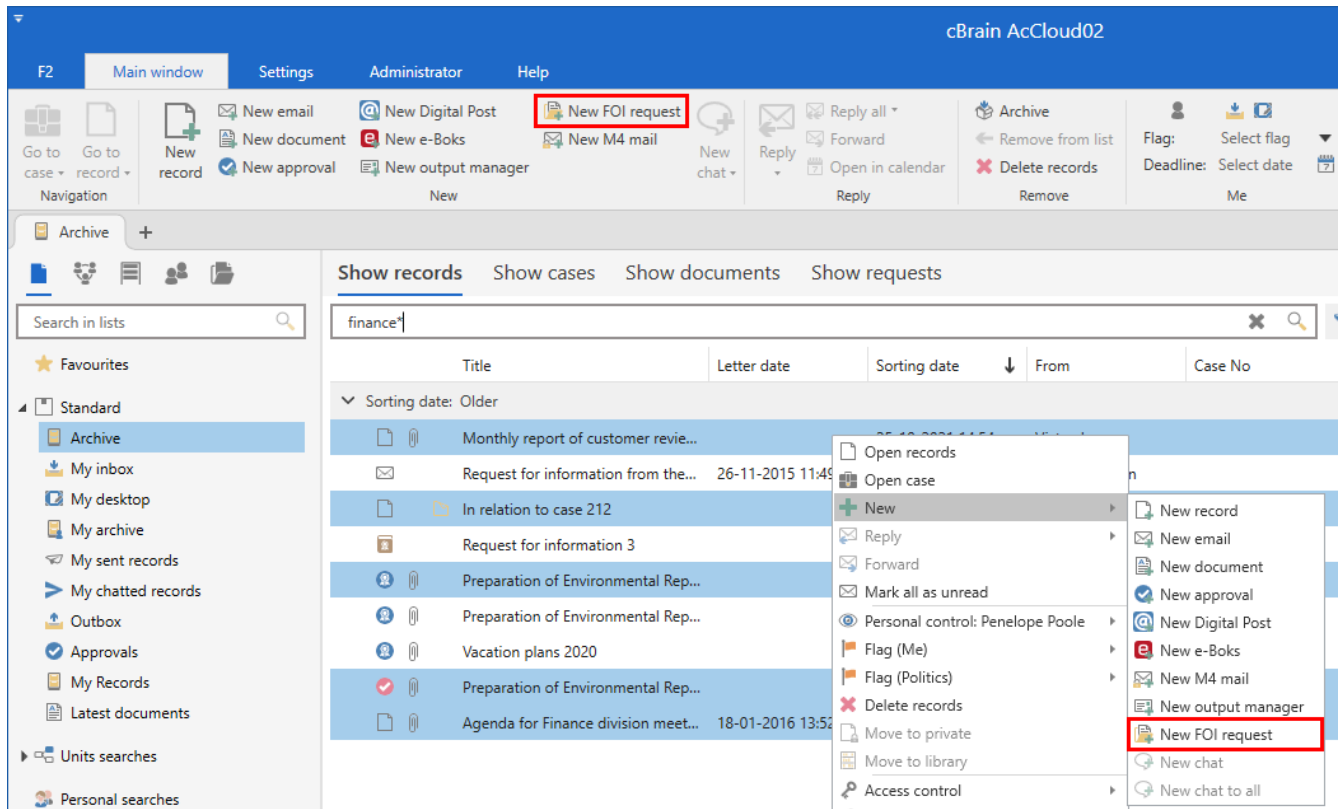

Figure 2. Create a new FOI request from the main window

The "New FOI request" dialogue opens and the FOI request can be given a title.

Figure 3. The "New FOI Request" dialogue

NOTE Depending on F2's setup, adding a file plan number, action code, disposal code, or a case type and/or a case guide may be required when generating a new FOI request case. It may also be possible to select a case template that determines which metadata fields are mandatory.

An FOI request is created as a case in F2. Click on **OK** to open the FOI request as a case. The case consists of copies of the records that were selected in the main window.

The records added to this case constitute the basis of the FOI request. This means the final request report is generated based on the selected records.

When a record is added to an FOI request case, all its attached elements such as documents, annotations, and requests are added as well. Chats and notes on the record are not included.

Active and finished FOI request cases

FOI request cases are accessed from the navigation bar on the left side of the main window. Click on the navigation line **shortcut** below the main window ribbon to show the list of active FOI request cases. Double-click or right-click on an FOI request case to open it. FOI request cases can be added to "Favourites" using the context menu.

Click on **Finished FOI Requests** to see all completed FOI request cases. The context menu options for finished FOI request cases are the same as for active ones.
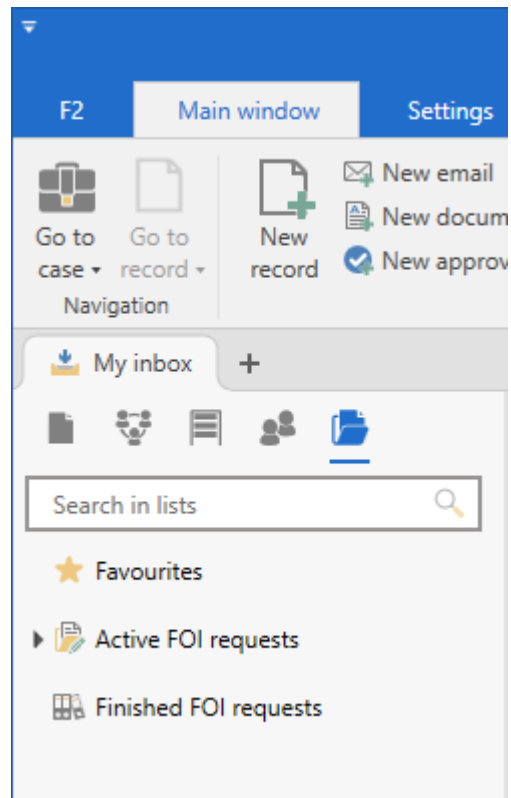
Figure 4. Navigate to active and finished FOI requests in the main window

NOTE   A user can only see the FOI request cases to which they have write access, i.e. the user must be involved or specified as a supplementary case manager. Cases with access set to the user's unit or to "All" are also displayed.

Menu items on the "FOI" tab

The menu items for working with an FOI request are located in the ribbon of the "FOI" tab.
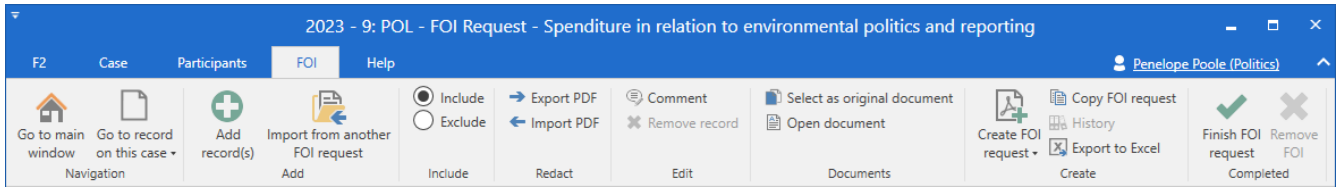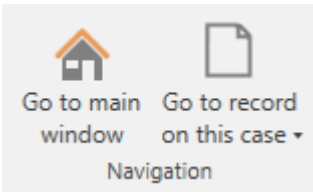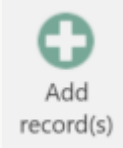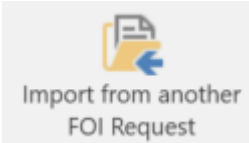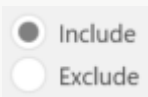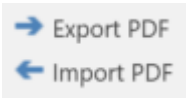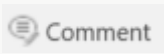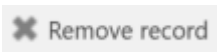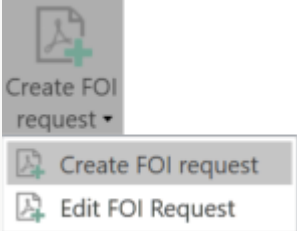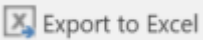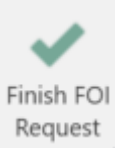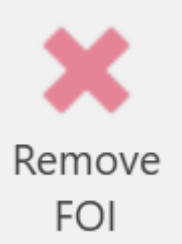

Figure 5. Menu items on the "FOI" tab

The menu items on the "FOI" tab are described below.

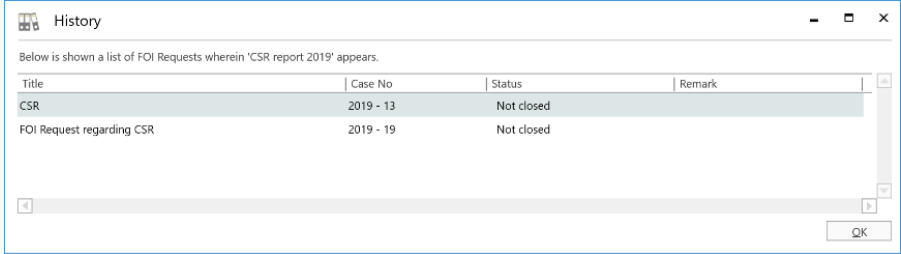| Function	Description
Go to main window · **Go to record on this case ▾** · Navigation	Navigate between the main, case, and record windows by clicking on the corresponding menu item. The **Record** menu item is only active if a record is open. Click on the **Case** drop-down menu to navigate to the case participants.
Add record(s)	Add one or more records to the basis of the FOI request. Read more about adding records to an FOI request.
Import from another FOI Request	Import records and FOI request elements from another FOI request. Read more importing from another FOI request.
● Include ○ Exclude	Include or exclude a record, document, or another FOI request element such as an annotation from the FOI request. Read more about including and excluding elements.
→ Export PDF ← Import PDF	Extract an FOI request element by exporting the element from F2. This may be used to remove sensitive personal data from the FOI request. Click on **Export PDF** to export the element. Once the element is exported it can be edited as needed. Once the element has been extracted it must be imported back to F2. Click on **Import PDF** to import the edited element. Read more about exporting and importing elements.
Comment	Add a comment to the FOI request element. This may be used to add the reason why a record or a document was excluded or extracted. Read more about comments.
✖ Remove record	To remove a record from the FOI request, select it and click on **Remove record**. The record and all its attached FOI request elements are then removed from the result list. This function is useful if a record has accidentally been included in the FOI request.

Function	Description
	duplicates (identical documents). Read more about duplicates.
Open document	To open a document from the result list, select a valid FOI request element and click **Open document** or press **Enter**.
Create FOI request ▾ Create FOI request Edit FOI Request	To generate the FOI request report, click on **Create FOI request**. Once F2 has generated the FOI request report, it appears in "My inbox" as an unread record. To adjust the FOI request report before it is generated, click on **Edit FOI request**. The following dialogue opens: *Figure 6. The "Edit FOI request" dialogue* In the dialogue unwanted content can be removed, the FOI request type can be selected, and the sorting of the FOI request report can be determined. Read more about creating and adjusting reports.

Function	Description
	Figure 7. The "Copy FOI request" dialogue
History	Once a record is selected from the basis of the FOI request, the **History** item becomes active. Click on it to open a dialogue that shows if the record is part of other FOI requests. *Figure 8. The "History" dialogue* **NOTE** It is also possible to display the "History" column in the result list.
Export to Excel	Click to export the records that make up the basis of the FOI request to Excel as a CSV file.
Finish FOI Request	To finish the FOI request, click on **Finish FOI request**. Click **Yes** to finish the FOI request. It is then no longer possible to create an FOI request report or to edit the basis of the FOI request.
Remove FOI	To remove the FOI request from the case, click on **Remove FOI**. This menu item is only active when the basis of the FOI request is empty.

FOI Request functions

This section describes a number of the functions on the "FOI" tab.

Add records to an FOI request

To add more records to the FOI request, click on **Add records** on the "FOI" tab.
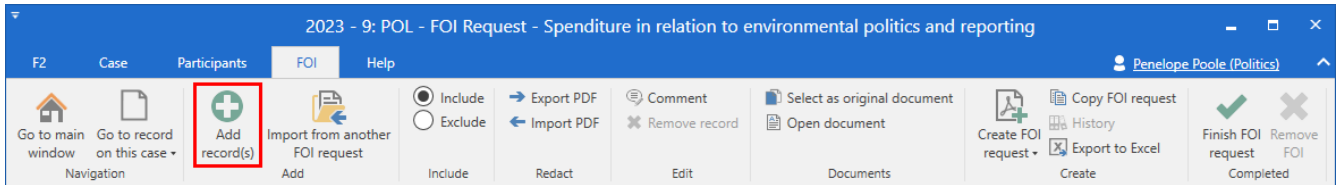
Figure 9. Add records

The "Choose records" search window opens, and the relevant records can be searched for. To add a single record to the FOI request, click on **OK** after the record has been found and selected in the result list.

To add multiple records to the FOI request, use the **Add records** menu item. Selected records from the result list are then added to the "Chosen records" field. Once all the wanted records are found and added to the "Chosen records" field, click on **OK**.

Figure 10. The "Choose records" search dialogue

The records then become part of the basis of the FOI request.

F2 FOI Request, Advanced can be configured to include approval documents in the basis of the FOI request and in the FOI request report. Approval documents can be added or excluded individually,

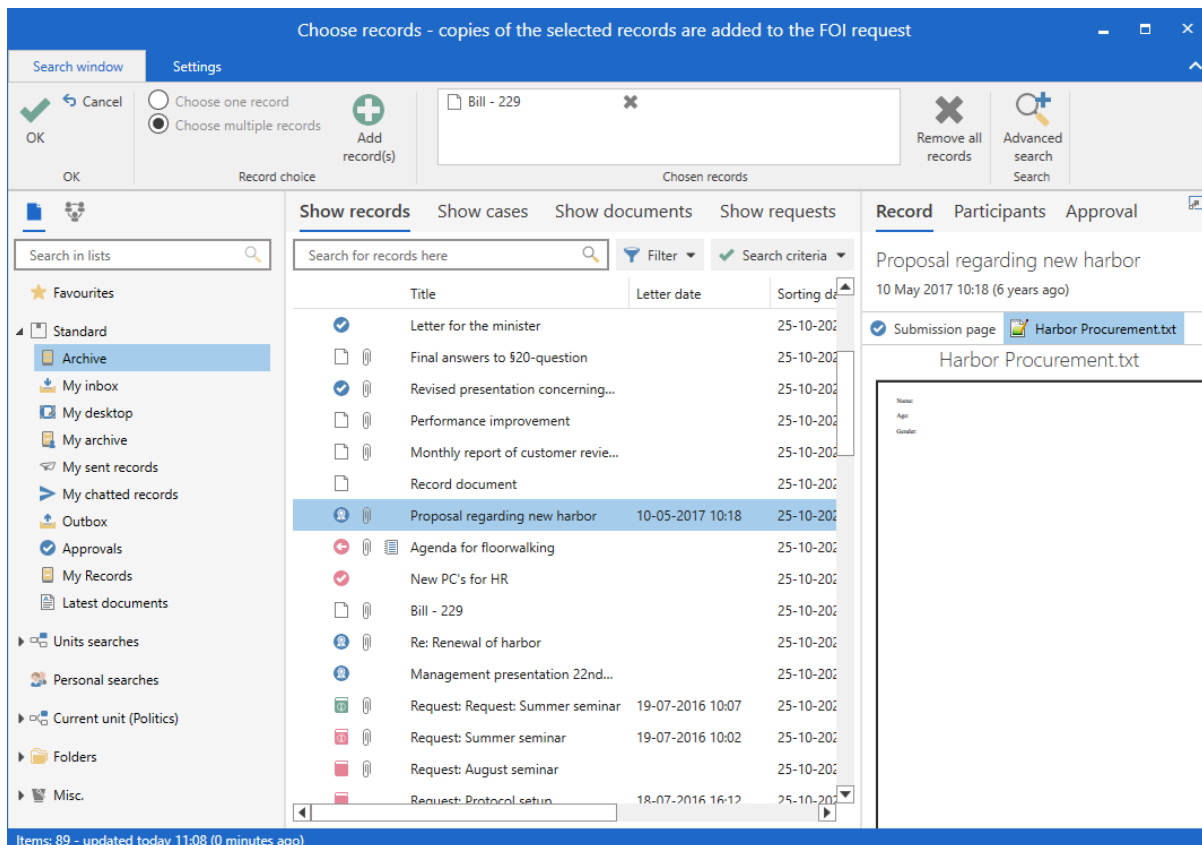just as record documents or attached documents. Configurations are performed in cooperation with cBrain.

If a record is added to the basis of the FOI request, but has already been added previously, an error message appears and the record is not added a second time. See the figure below.
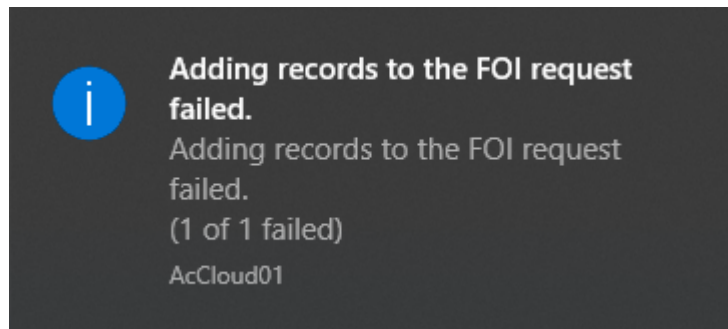
Figure 11. Error message

F2 shows an additional error message for users who have ticked the setup option "Show error message when mass operations fail". This option can be activated in "Setup" on the "Settings" tab in the main window.
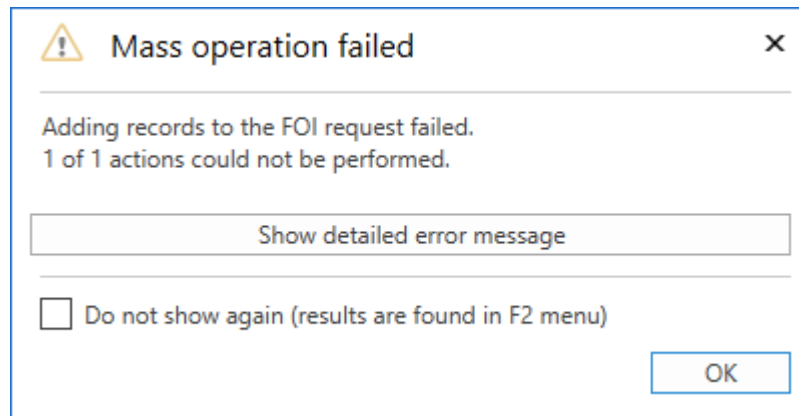
Figure 12. Mass operation failed

Import from another FOI request

To import material from another FOI request, click on **Import from another FOI request** on the ribbon of the "FOI" tab. An import may be needed if another office contributes material to the basis of the FOI request and has created their own FOI request case.

Figure 13. Import from another FOI request

In the "Import from another FOI request" dialogue, select the wanted FOI request in the list and click on **OK**. Records from the selected FOI request are then added to the basis of the original FOI request.

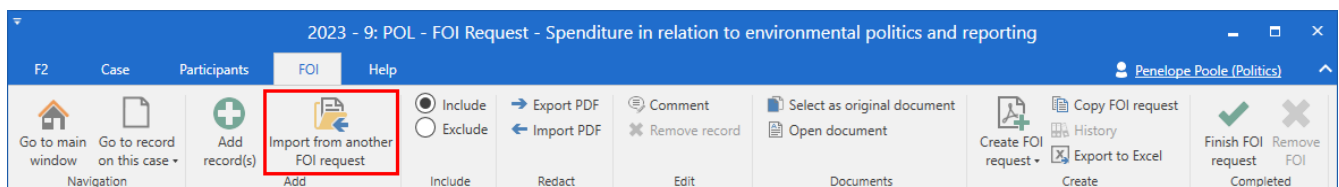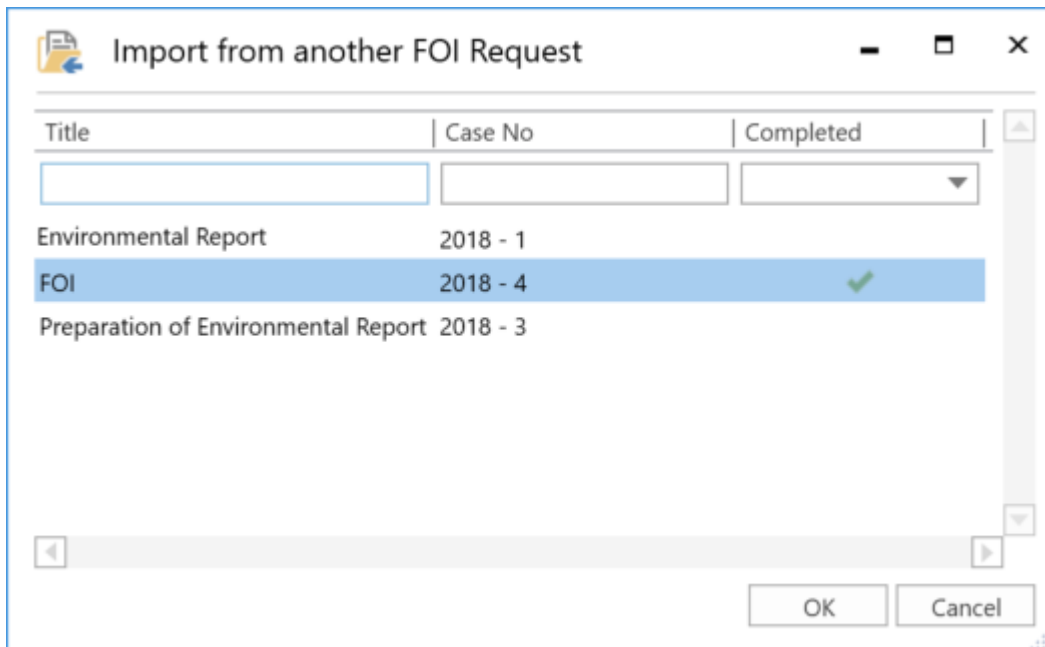*Figure 14. The "Import from another FOI request" dialogue*

Records that are already included in the FOI request basis cannot be added a second time. If one or more imported records are already included in the original FOI request, a dialogue appears informing the user that the import failed.
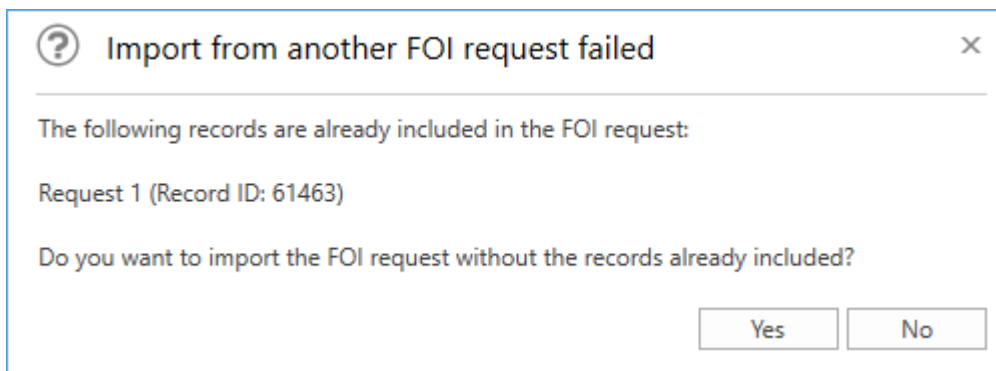
Figure 15. The "Import from another FOI request failed" dialogue

Include or exclude elements

FOI request elements can be excluded from the FOI request report if necessary. To exclude an element, first select it in the basis of the FOI request and then click on **Exclude** in the "FOI" tab. In the basis of the FOI request, it is possible to see if an element is "Included", "Partly included", or "Excluded" in the "Status" column.

If an excluded element must be included again, select it and click on **Include**.
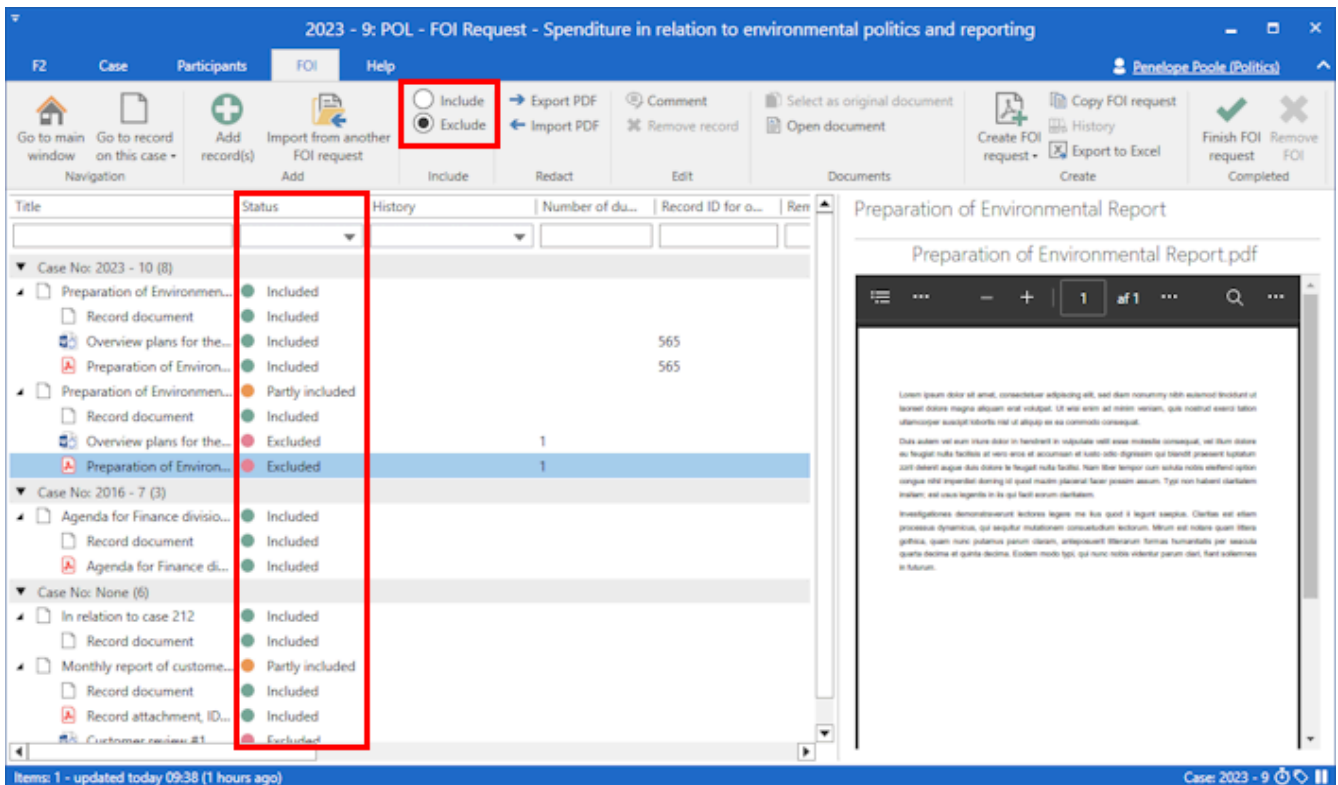
Figure 16. Include or exclude elements

NOTE	It is possible to set up a filter for the entire organisation that automatically removes unwanted content in an FOI request report. This filter can also include approval documents. The configuration is performed in cooperation with cBrain.

Export and import elements

An FOI request element must be exported from F2 in order to perform extractions. This action may be relevant if an element contains sensitive personal data that cannot be included in the FOI request report.

Select the wanted element in the basis of the FOI request and click on **Export PDF**.

Figure 17. Export PDF

Save the element locally on the PC or on another device. Then open it using a programme in which the element can be edited or extracted. Remember to lock and/or ensure protection of the document before it is saved again.
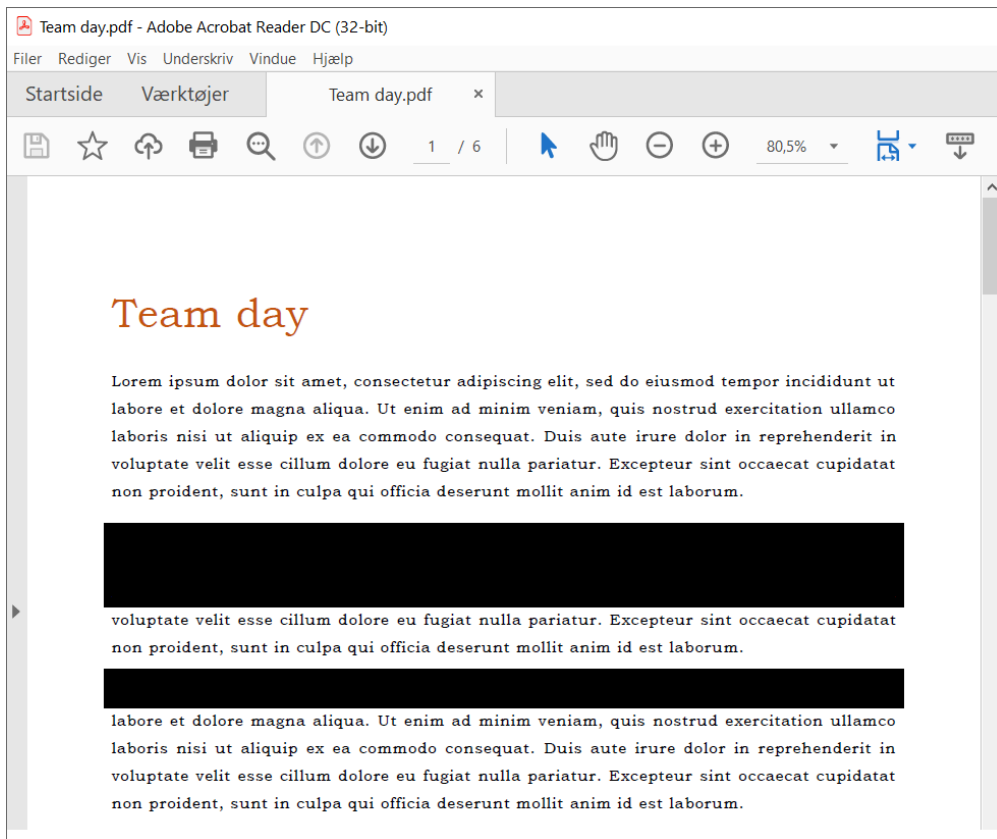
Figure 18. Edit PDF

NOTE If a PDF file is edited or contains extractions, ensure that the PDF file is locked and/or protected so that other users or external recipients cannot edit the FOI request report. This can be done in programmes such as Adobe Acrobat or LibreOffice.
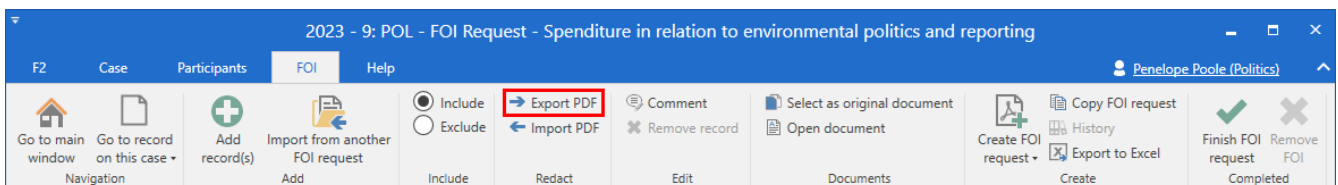
Once the element has been edited, it must be imported back into F2 where it will replace the previously exported element. Select the exported element in the basis of the FOI request and click on **Import PDF**.
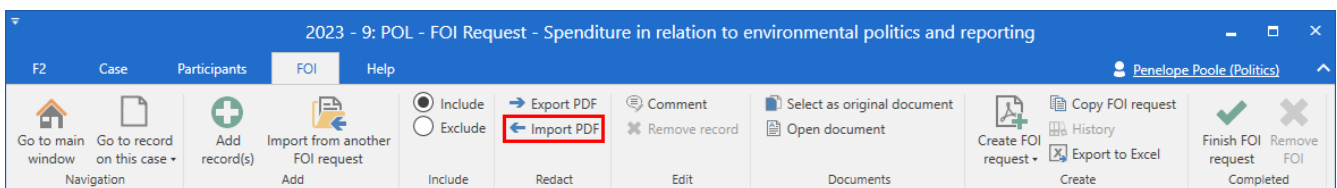
Figure 19. Import a PDF

A dialogue opens in which the edited element can be selected from a location on the PC. Click on **Open** to import the edited element to the FOI request case, replacing the selected element.

Remember that the element must be locked or otherwise protected before it is imported to prevent other users from accidentally reverting the editing, so other users cannot revert the editing.
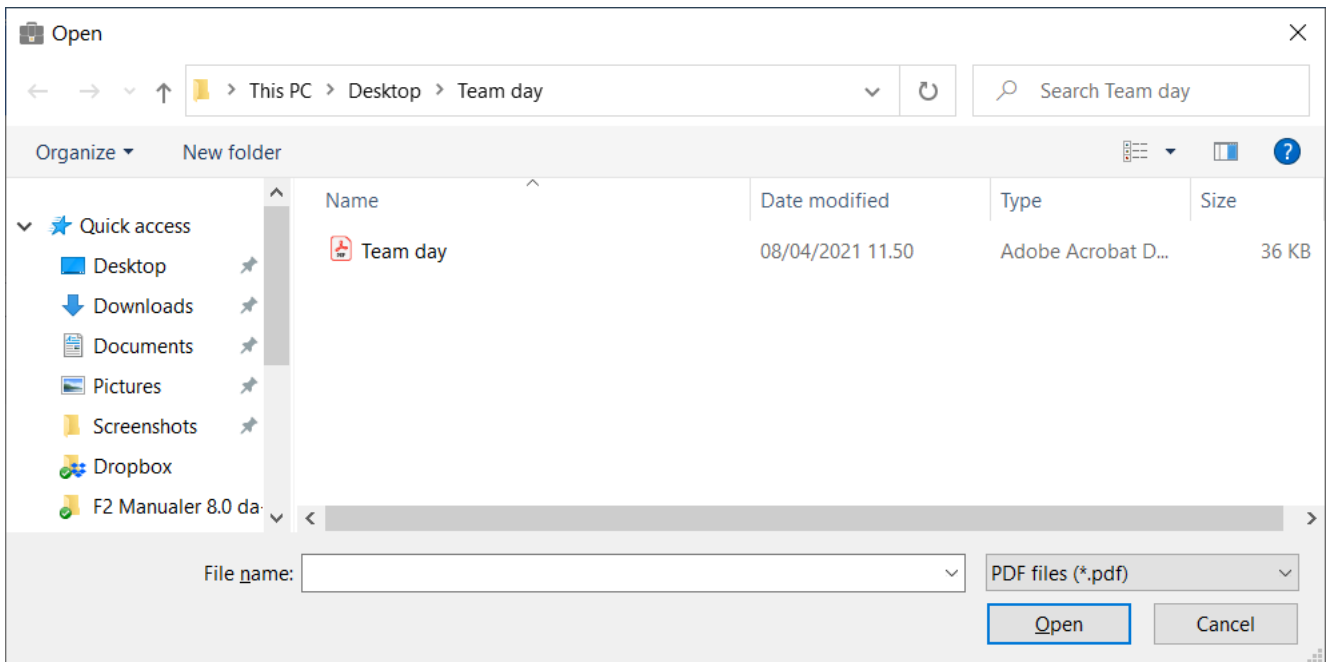
Figure 20. Select the edited element from a location on the PC

Once the edited element is imported, it appears on the "FOI" tab along with the ✏ icon. The status of both the imported element and the associated record is shown as "Partly included" since the element will not be included in full in the FOI request report.
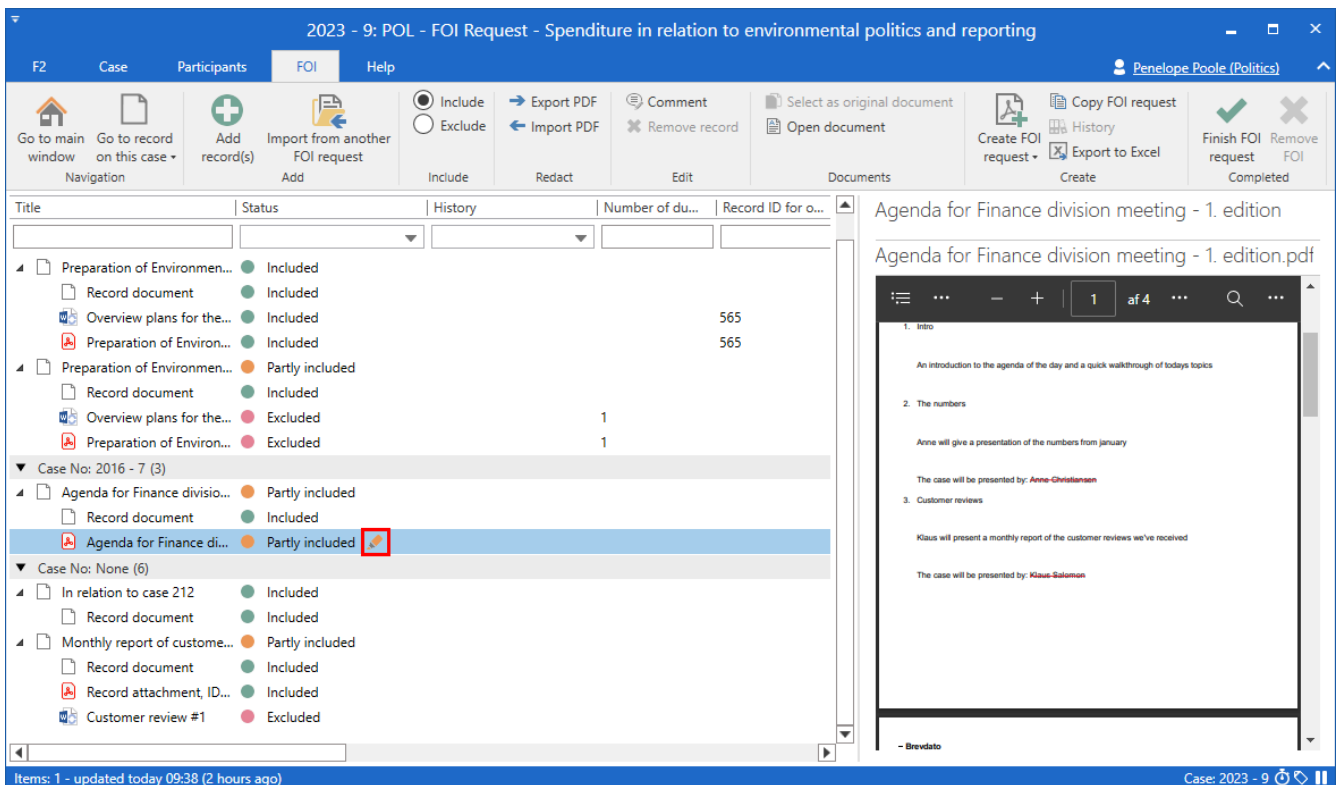
Figure 21. Icon indicating an imported element in the FOI basis

Add comment

Comments can be added to all FOI request elements. This function may be used for stating the reason why an element was excluded or edited.
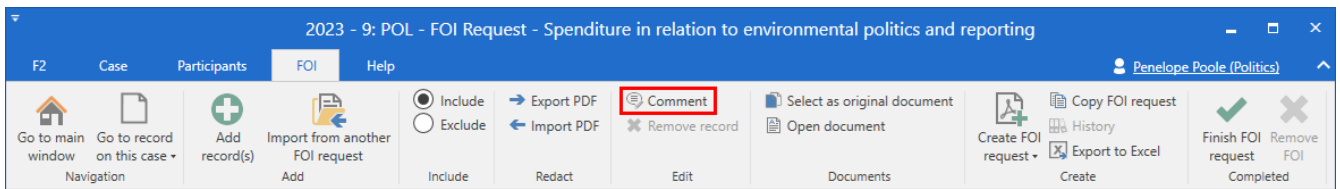
Figure 22. Add comment

Select an element and either click on **Comment** in the ribbon of the "FOI" tab or select **Comment** using the context menu. The "Edit comment" dialogue opens as shown below. Enter the comment here and click on **OK** to save it.
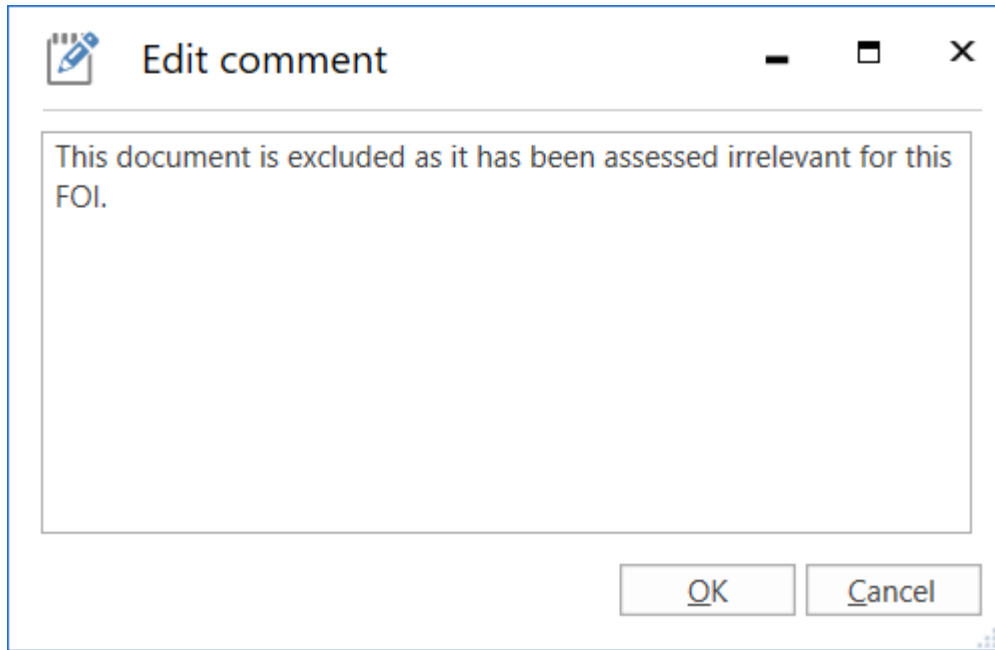
Figure 23. The "Edit comment" dialogue

When a comment is added to an element, the 💬 icon appears in the "Remark" column in on the "FOI" tab. Place the cursor over the icon to view the comment.
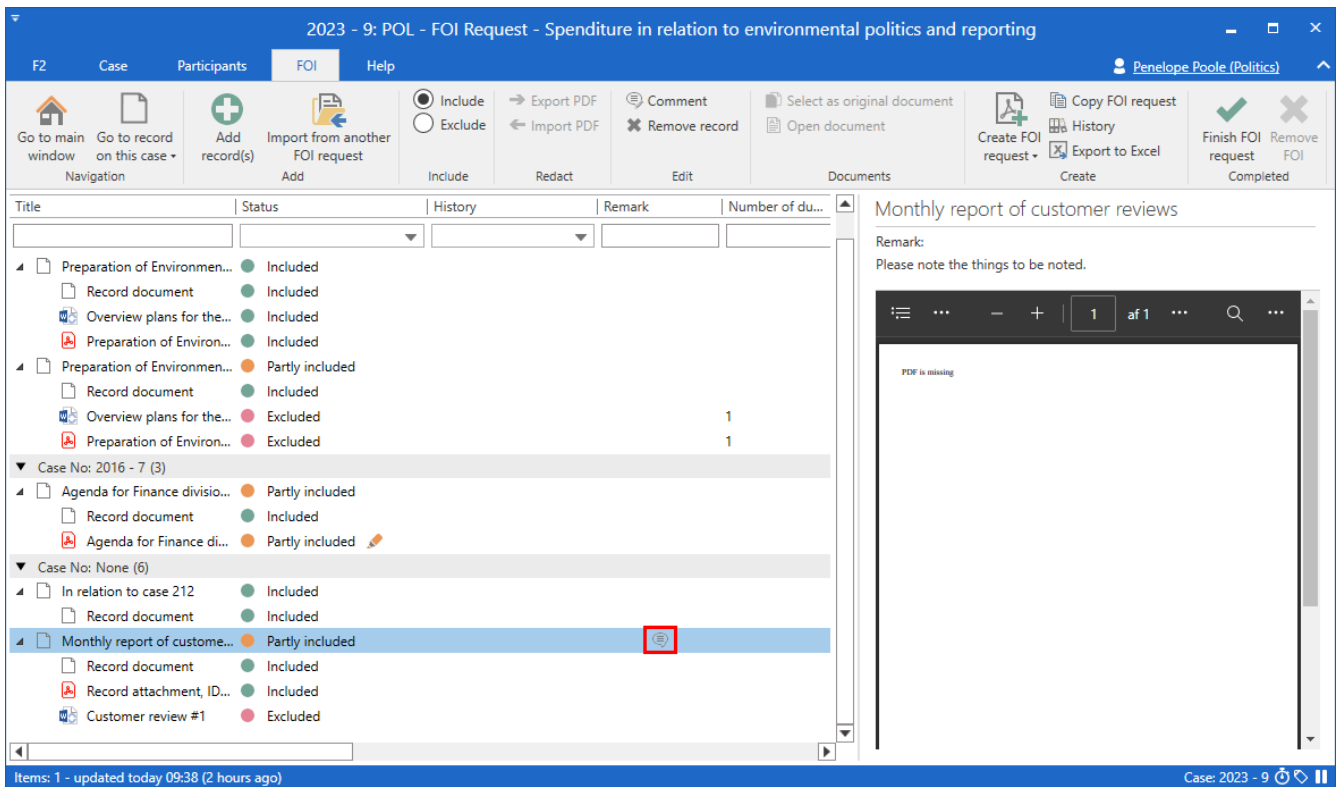
Figure 24. A comment in the basis of the FOI request

If needed, the comment can be edited. Select an element and click on **Comment**. The "Edit comment" dialogue opens. The comment can be removed by deleting all the text in the dialogue and clicking **OK**.

When a comment is added to a record, it appears in the record overview in the FOI request report and on the record detail page in the "Comment" field. If a comment is added to another element such as a document or an annotation, the comment appears on the record detail page for this element. See the example below.

Figure 25. Example of a record with a comment

Show duplicates

F2 indicates when duplicate documents appear in an FOI request. Duplicates may occur if a document exists as an attachment to several records, and the records are then added to the same FOI request. When this happens, F2 appoints one of the identical documents as the original document.

In the result list, the columns "Number of duplicates" and "Record ID for original record" can be added to the result list on the "FOI" tab.
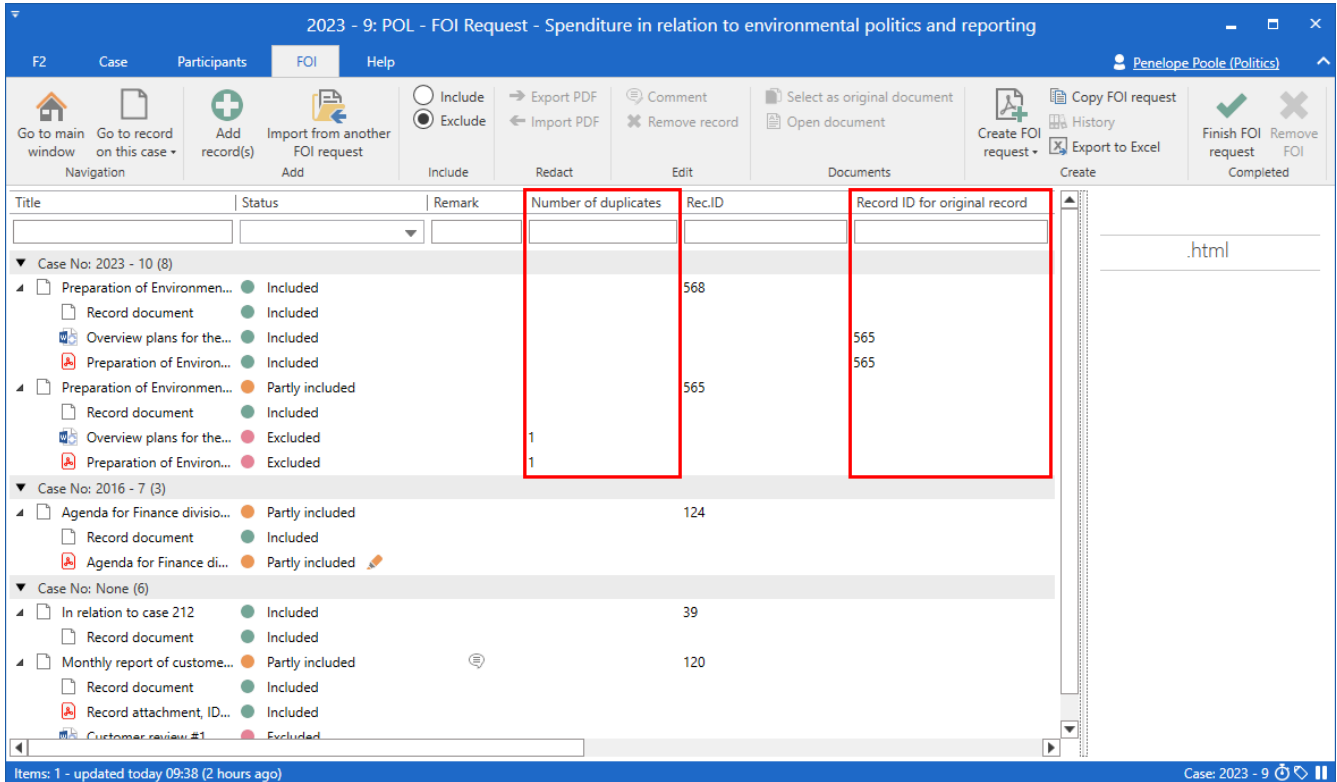
Figure 26. Display of duplicates

Column	Description
Number of duplicates	The column shows the number of duplicates for a given document.
Record ID for original record	The column shows which record contains the original document.

Select the original document

F2 automatically selects an original document for every duplicate, but it is possible to manually select another document. To do this, select the wanted document and click on **Select as original document** in the "FOI" tab.

Figure 27. The "Select as original document" menu item

Remove duplicates

F2 FOI Request, Advanced can be configured to include the option of removing duplicates from the FOI request report. This means that a duplicate element only included once in the report. If the

configuration is enabled, go to the "Edit FOI request" dialogue and tick the "Remove duplicate documents" checkbox.

F2 FOI Request, Advanced can also be configured so the "Remove duplicate documents" checkbox is ticked by default. Configurations are made in cooperation with cBrain.

Information about duplicates in the FOI request report

If duplicate documents are removed using the "Edit FOI request" dialogue, it is indicated in the final FOI request report. The report also shows if a document is a duplicate or an original.
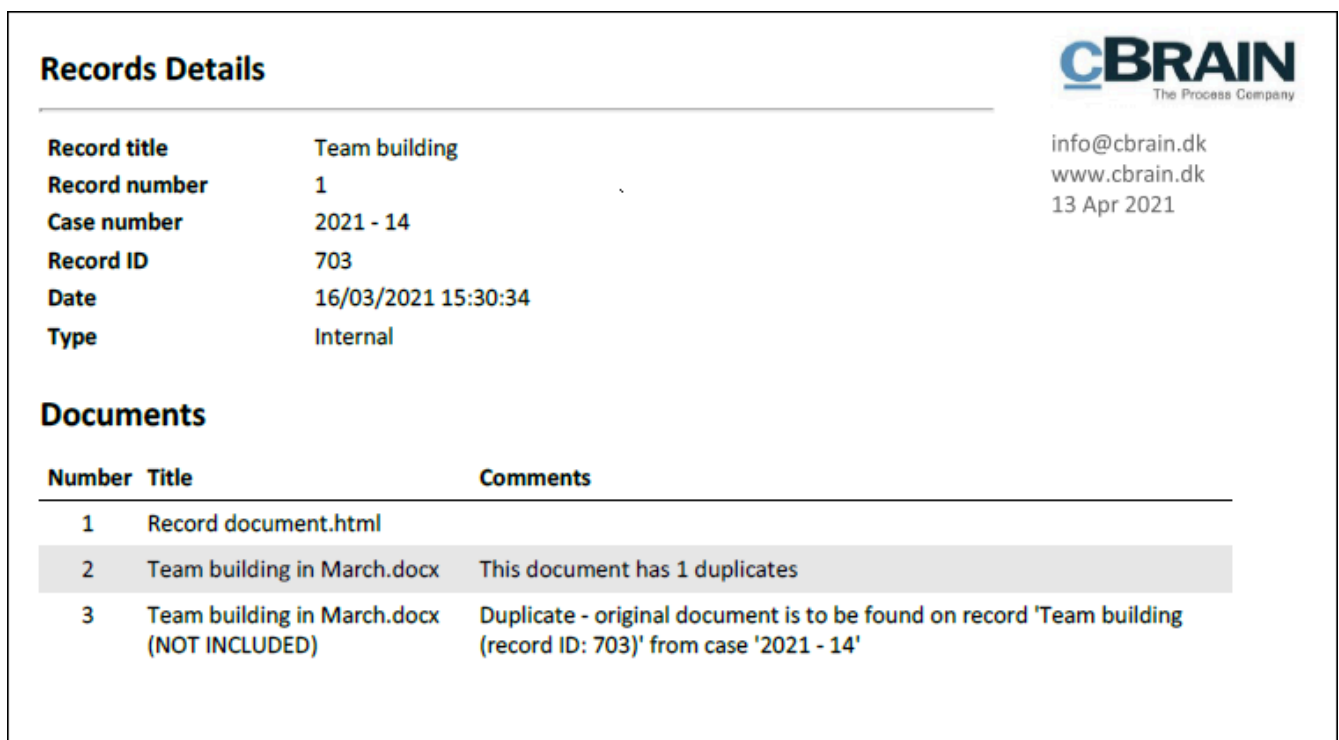
Information regarding duplicates is displayed in the FOI request report types that contain documents:

- Full FOI request

- Overview: Cases, records, documents, etc.

Read more about the different types of FOI request reports.

The "Record Details" section of the original document states the number of duplicates. On a duplicate, the "Record Details" section states its duplicate status and the details of the record containing the original document. The section also states whether the duplicate has been removed from the FOI request.

The figure below shows an example of duplicate comments in an FOI request report.

Figure 28. FOI request report

Working with the FOI request report

This page explains how to create an FOI request report from the basis of an FOI. The section also describes the different detail levels available in an FOI request report.

Create an FOI request report

Once the content of the FOI request is selected, click on **Create FOI Request** in the "FOI" tab. It is possible to continue working in F2 while the FOI request report is generated.
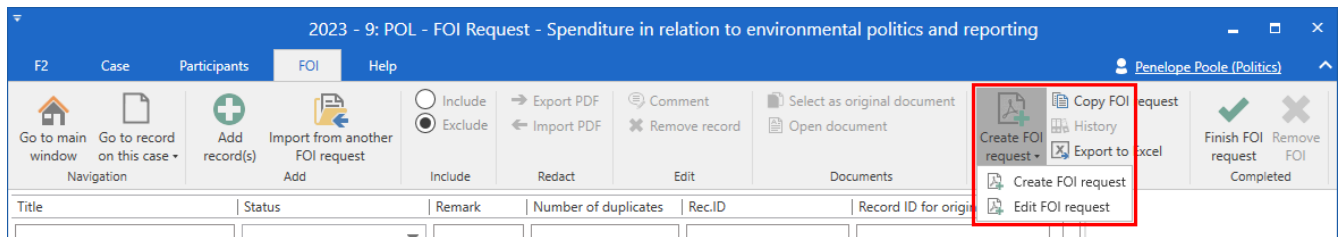
Figure 29. Create FOI request

The progress of the PDF creation is displayed by a status bar at the bottom right corner of the FOI window.
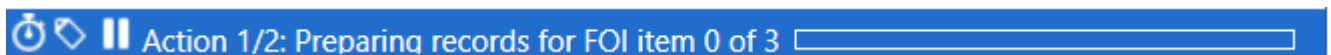
Figure 30. The status bar

Once F2 has generated the FOI request, the user is notified that the FOI request report is ready in "My inbox".
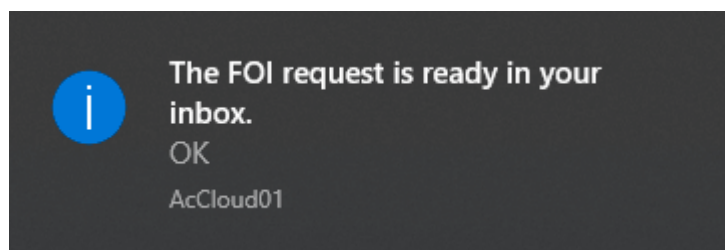
Figure 31. Message regarding the ready FOI request

The FOI request report is attached to the record. See the example below.
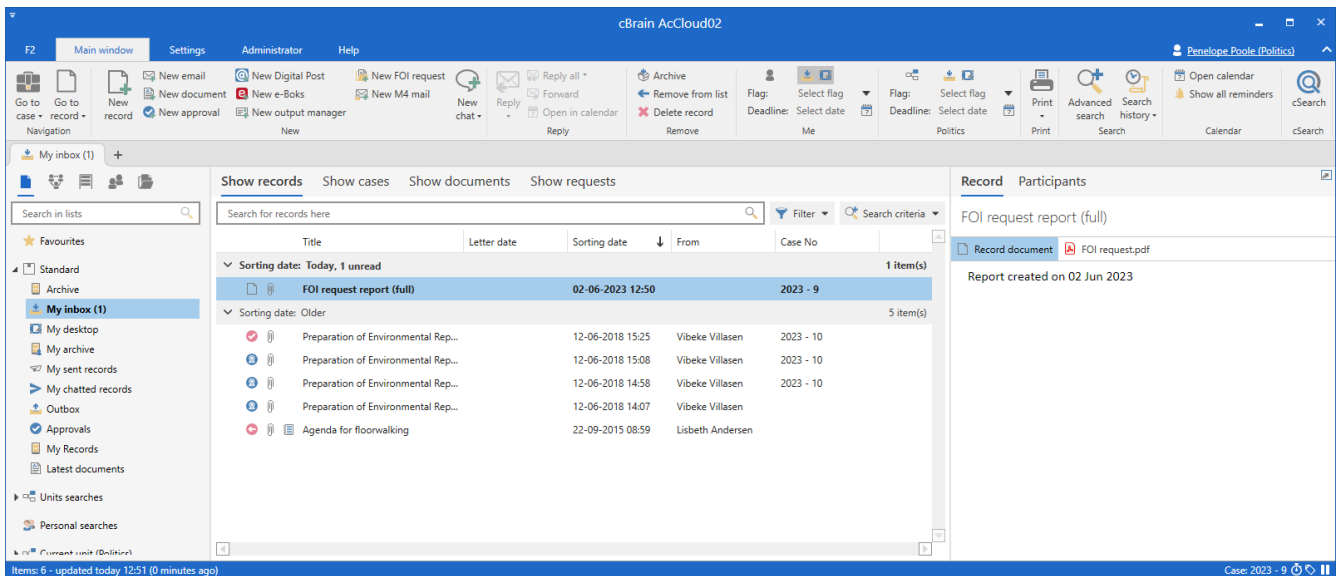
Figure 32. The FOI request report in an inbox

A new FOI request report can be created if further editing or another type of FOI request is needed. Click on **Create FOI request** on the "FOI" tab in the case window to create another FOI request report.

The user can process the FOI request just like any other record. It may be forwarded or the responsibility may be allocated to a colleague. The user can also send the FOI request for approval using the F2 Approvals add-on.

The content of the FOI request report

The FOI request report always contains a summary of records divided by cases. The FOI request report can be adjusted with different detail levels for the included records and FOI request elements. Read more about editing the FOI request report.

Figure 33. Record summary in the FOI request report

The different fields in the record summary are described below.

Field	Description
"Record no."	When a record is registered, it is assigned a record number. The record number appears in this field.
	Once an FOI request report is generated, its elements can be sorted by record number. Unregistered records do not have a record number and are therefore listed separately either before or after records with a record number. Read more about sorting FOI request elements.
"Date"	The date in this field corresponds to the letter date of the record, if available. Otherwise the field shows the creation date of the record.
"Title"	The "Title" field shows the record's title.
"Record ID"	Every record in F2 has a unique record ID. The record ID appears in this field.
"#"	The "#" field shows how many related documents that are attached to the record. This includes the record document along with any documents, annotations, etc., that are attached to the record.
"Comments"	If a comment has been added to a record in the basis of the FOI request, it appears in this field. Read more about comments.

Edit the FOI request report

To edit the FOI request report before it is created, click on **Edit FOI request** in the ribbon of the "FOI" tab.
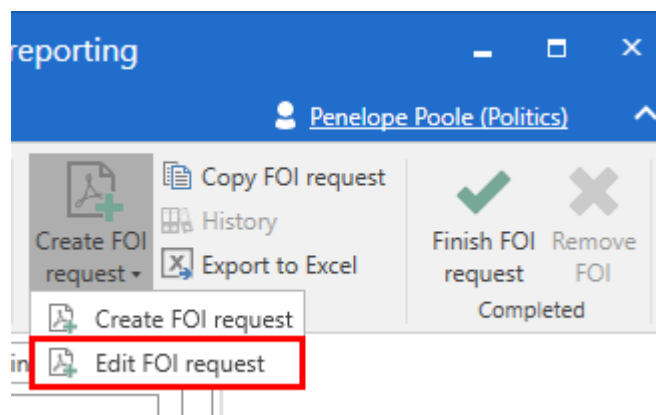
Figure 34. Edit FOI request

The "Edit FOI request" dialogue opens. Here unwanted content can be removed, the FOI request type can be selected, and the filtering of the FOI request can be adjusted.

A default setup for the "Edit FOI request" dialogue can be configured on an installation level.
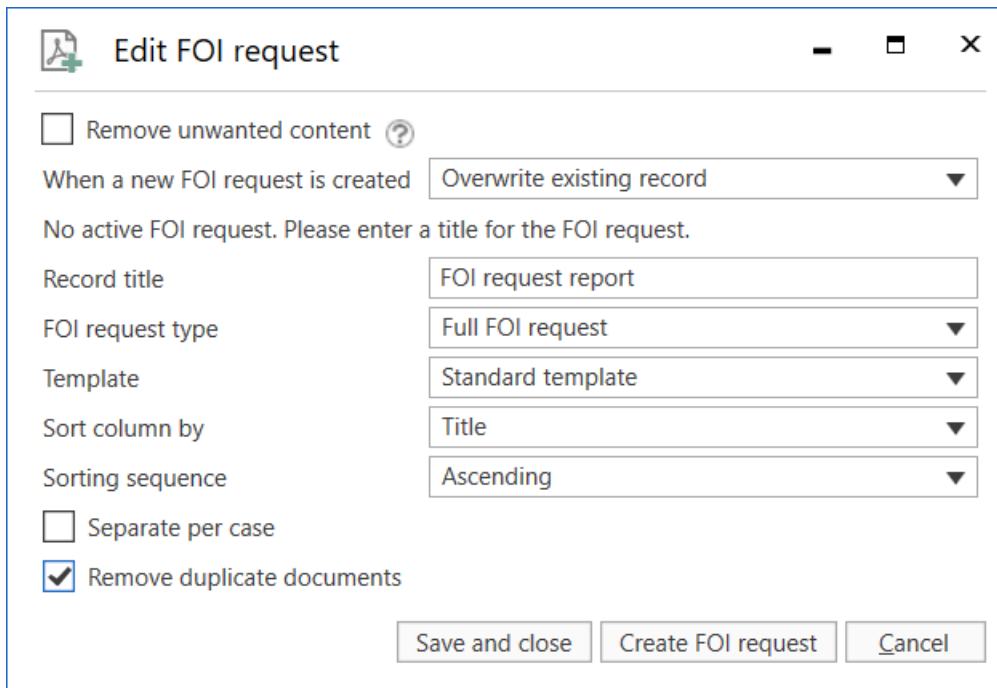
Figure 35. The "Edit FOI request" dialogue

The available functions in the "Edit FOI request" dialogue are described below.

Function	Description
"Remove unwanted content"	A filter can be set up to automatically remove unwanted content from the FOI request report. Unwanted content may be confidential or irrelevant information which the filter then excludes from the FOI request report. The configuration is performed in cooperation with cBrain. To enable the filter, tick the "Remove unwanted content" box. Click the **question mark icon** next to the box to see what the filter removes. This opens the window on the figure below. *Figure 36. FOI request filter*
"When a new FOI request is created"	Have F2 either create a new record or overwrite the existing record when creating a new FOI request report. *Figure 37. Drop-down menu for the field "When a new FOI request is created"*
"Record title"	Specify a title for the FOI request report. An organisation can decide on a standard title if wanted.

Function	Description
	• Overview: Cases, records and documents, etc. • Overview: Cases and records • Overview: Cases and records (compact). The different detail levels are described here.
"Template"	Select a template on which to base the report. A standard template is the default choice. If the FOI request report must adhere to a specific template customised to the single organisation, it is chosen here. *Figure 38. Drop-down menu for the field "Template"* **NOTE** Only one template is available by default. The drop-down menu is only shown if other templates have been created. New templates are configured in cooperation with cBrain.
"Sort column"	Select the sequence by which to sort the FOI request report elements. Choose between the following columns: • Title • ID no. • Letter date • Record number.
"Sort sequence"	Sort the chosen column by the following values: • Ascending • Descending.
"Separate per case"	Tick this box to split the FOI request report into one PDF document per case.
"Remove duplicate documents"	Tick this box to remove all duplicates from the FOI request report. Read more about removing duplicates.

Detail levels for the FOI request report

The next sections describe each of the detail levels available in an FOI request report. The table below shows the difference between the four detail levels. Each detail level is described further in the subsequent sections.

Detail level	Description
Full FOI request	Provides a list of the records that make up the basis of the FOI request. Documents, requests, annotations, and comments are included in full.
Overview: Cases, records and documents, etc.	Provides an overview of the records that make up the basis of the FOI request. Provides an overview of documents, requests, annotations and comments but does not include their content.
Overview: Cases and records	Provides an overview of the records that make up the basis of the FOI request.
Overview: Cases and records (compact)	Provides an overview of the records that make up the basis of the FOI request with no page breaks.

Full FOI Request

Select "Full FOI request" to create an FOI request that shows the included FOI request records divided by case.

This detail level also contains all the included FOI request elements in full, including documents, requests, annotations, and any comments.

Record details

Record title	Re: Budget request	
Record number	4	
Case number	2022 - 5	
Record ID	770	
Date	15-02-2022 08:47:11	
Type	Internal	
Comments	Certain elements redacted.	

info@cbrain.dk
www.cbrain.dk
05 apr 2022

Documents

Number	Title	Comments
1	Record document.html	
2	Budget summary.docx	
3	Detailed budget.xlsx (NOT INCLUDED)	Excluded because it contains sensitive information.

Figure 39. Example of a full FOI request report

Overview: Cases, records and documents, etc.

Select "Overview: Cases, records and documents, etc." to create an overview of the included FOI request records divided by case. This detail level also provides an overview of each record's documents, annotations, and requests, but their contents aren't shown. If a comment was added to an FOI element, the comment is shown in full.

Record details

Record title	Re: Budget request	
Record number	4	
Case number	2022 - 5	
Record ID	770	
Date	15-02-2022 08:47:11	
Type	Internal	
Comments	Certain elements redacted.	

info@cbrain.dk
www.cbrain.dk
06 apr 2022

Documents

Number	Title	Comments
1	Record document.html	
2	Budget summary.docx	
3	Detailed budget.xlsx (NOT INCLUDED)	Excluded because it contains sensitive information.

Figure 40. Example of an FOI request report showing cases, records, documents, etc.

Overview: Cases and records

Case title Org - Projects 2022 - Public political forums

Case number 2021 - 3

CBRAIN
The Process Company

info@cbrain.dk
www.cbrain.dk
06 apr 2022

Record no.	Date	Title	Record ID	#	Comments
1	01-12-21	Budget proposition for public political forums	737	1	

 # = number of related documents

Figure 41. Example of an FOI request report showing cases and records

Overview: Cases and records (compact)

Select "Overview: Cases and records (compact)" for an overview of the included FOI request records divided by case. This detail level removes all unnecessary page breaks and provides a compact overview.

This detail level is suitable to use when discussing which elements to include in the FOI request report.

FOI Request Report Overview

CBRAIN
The Process Company

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www.cbrain.dk
06 apr 2022

2022 - 5: Adm - Tender

Record no.	Date	Title	Record ID	#	Comments
3	14-02-22	Budget request	768	1	
4	15-02-22	Re: Budget request	770	3	Certain elements redacted.

 # = number of related documents

2021 - 3: Org - Projects 2022 - Public political forums

Record no.	Date	Title	Record ID	#	Comments
1	01-12-21	Budget proposition for public political forums	737	1	

 # = number of related documents

Records not on a case

Record no.	Date	Title	Record ID	#	Comments

 # = number of related documents

Figure 42. Example of a compact FOI request report

Send the FOI request for approval

Using the F2 Approvals add-on module, an FOI request report can be sent for approval within the organisation. This may be relevant if the report must be approved by another department or unit before it is sent to the requester.

Approvers can see and edit both the FOI request report (i.e. the generated PDF version of the FOI request) and the basis of the FOI request report (i.e. the FOI request case).

Open the record with the FOI request report and click on **New approval** in the record window's ribbon.

The dialogue for creating approvals opens. Enter the relevant information.

Tick the box "Give approvers on this step access to the record's case", then click **Save** to create the approval.

Figure 43. Give approvers access to the FOI request report

This box must be ticked on each approval step to ensure that all approvers have write access to the FOI request case. Approvers can then edit the basis of the FOI request.

NOTE	It is necessary to tick the box "Give approvers on this step access to the record's case" before starting the approval process.

Start the approval process. All the approvers are then able to add or remove content from the FOI request case and edit the PDF version of the FOI request report. An approver has the same permissions on the FOI request case as the FOI request creator.

Once the FOI request report has passed through the approval process and is back with the FOI request creator, the following options are available:

- If the FOI request report has been finally approved without any comments or if the PDF version of the FOI request report has been edited or extracted, it can be sent to the requester.

- If content has been added or removed from the FOI request case, a new FOI request report must be generated before it can be sent to the requester.

Read more about approvals.

Manage record numbering in an FOI request

If an FOI request has a gap in its sequential record numbering, the reason may be that a record has been deregistered or removed from the case.

Deregistration of records

A record is assigned a record number once it is attached to a case and the "Registered" checkbox has been ticked.
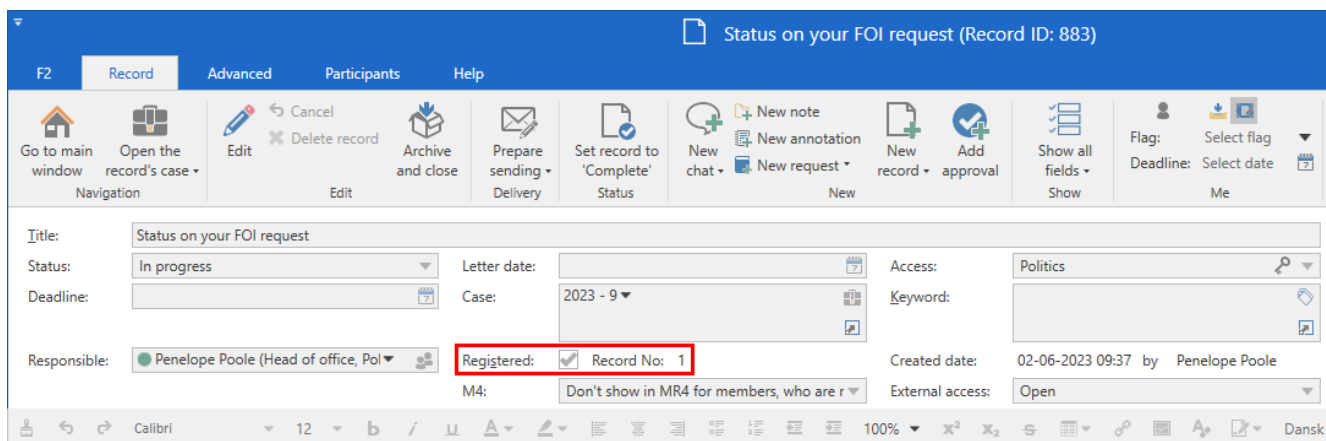

Figure 44. A registered record

Records are assigned record numbers in the order they are registered. Once a record number has been assigned to a record, the number cannot be reused. This means that if a record is deregistered, the record number it was assigned is no longer available.

If the record is registered again, it is assigned a new record number - the next record number available and not its original number.

Record numbers are connected to cases. If a registered record is removed from a case, it will be given a new record number if it is attached to the same case again.

Finding a record that is deregistered and removed from a case

Records that have been deregistered and removed from a case can be found again using the case history. Click on **History** in the case window's ribbon to view the case history.
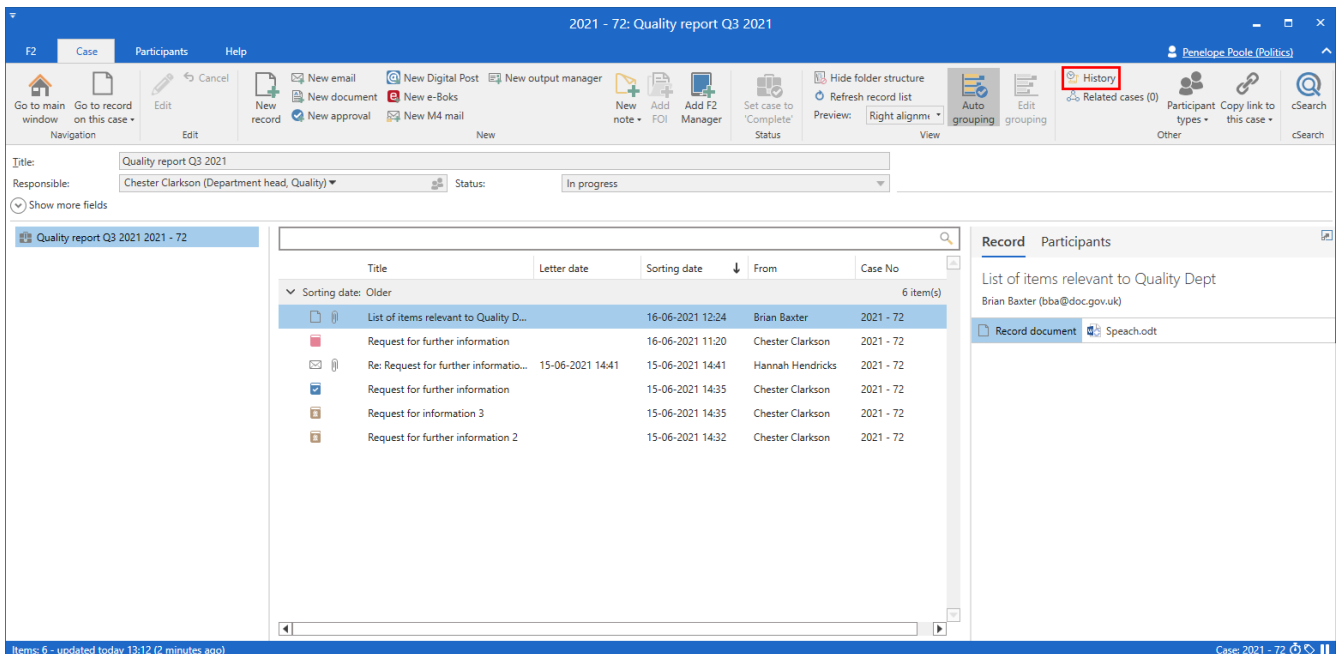
Figure 45. The case history in the case window

The "Case history" dialogue contains a log of all actions made on the case. Using the "Description" column it is possible to see if a record has been removed from the case. The log also shows when a record has been deregistered. The fields below the column names can be used to filter the display of the case history by e.g. entering text into the "Description" field.
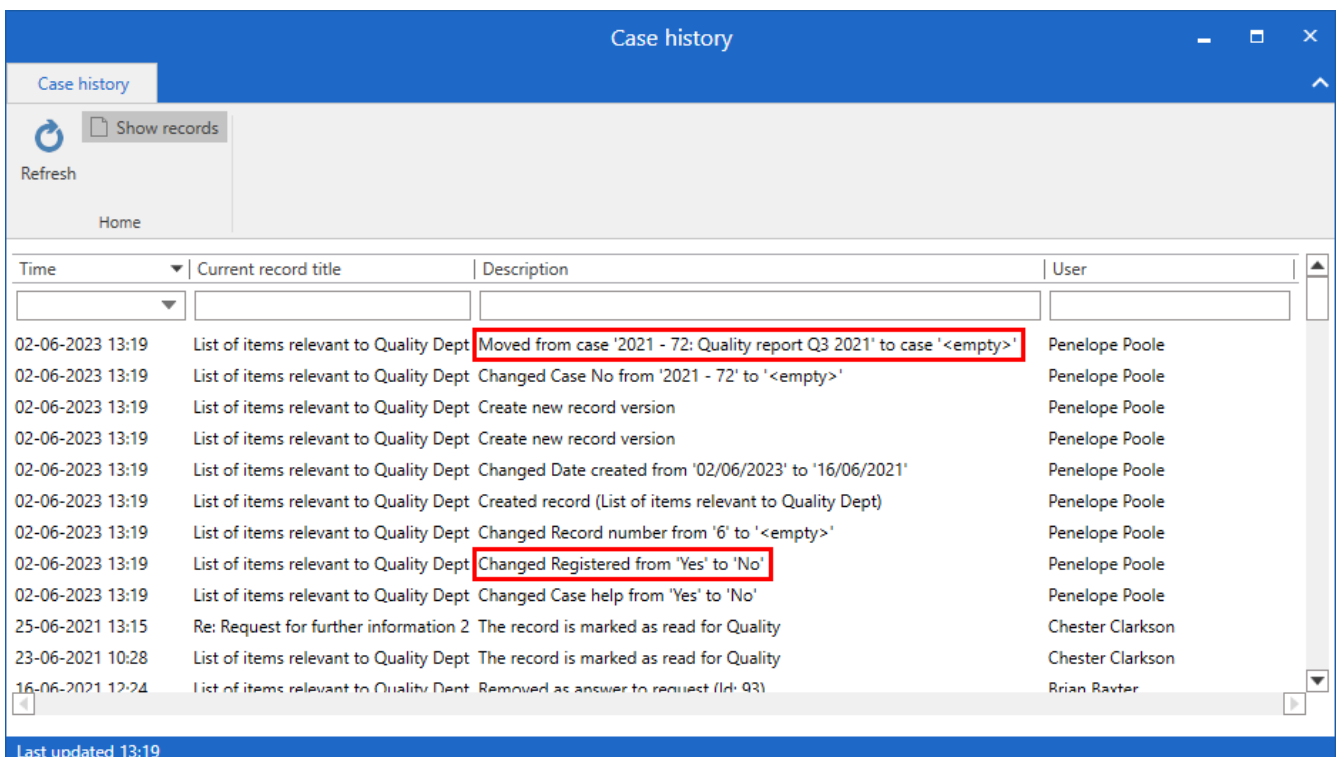

Figure 46. The "History" dialogue

Once a record is identified in the "Case history" dialogue, it can be found in the "Archive" by searching for the record title.

F2 FOI Request, Advanced configuration options

The configuration of F2 FOI Request, Advanced is performed on an installation level and adjusted to fit the individual organisation and its work procedures. The following can be configured in cooperation with cBrain:

- Select a default setup for editing the FOI request report. The "Edit FOI Request" dialogue can be set up with a configuration that applies to the entire F2 installation. This means that FOI request reports are generated using the same setup by default. However, the individual user can still adjust a given FOI request report.

- Add a filter that automatically removes unwanted content before the FOI request report is generated. This may be records or file content with a certain title. The filter can also be applied to approval documents if they are included in the basis.

- Exclude requests and annotations when a new FOI request is created or when new records are added to an existing FOI request.

- Define an empty record document in F2. A record document without text becomes an empty page in an FOI request report. This can be avoided if the organisation creates an empty record document definition. In this case, F2 will automatically remove pages from the FOI request report that would have been empty. This filter is invisible to users.

- Specify the text of the black bar at the top of appendices of the FOI request report.

- Define a default layout for the FOI request report including a default front page.

- Include a front page in the FOI request report with a list of contents.

- Choose between several FOI request templates.

- Add page numbers in the FOI request report. The format of the page numbering is configurable.

- Display page numbers as Roman numerals.

- Configure the format of title bookmarks for records, cases, documents, requests, and annotations in the PDF when an FOI request report is generated. Bookmarks may also be omitted.

- Add a bookmark for a group of records not associated with a case in the PDF when generating an FOI request report.

- Include the option of removing duplicates from the FOI request report. This means that an element with duplicates is only included once in the report.

- Tick the "Remove duplicate documents" checkbox by default.

- Include approval documents in the basis of the FOI request.