# Request

Created on 26/03/2025 04:07 for F2 version 10

# **Introduction to F2 Request**

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

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

Three types of requests exist in F2:

- **Internal requests:** A internal request is a formalised way of requesting that a job be done within an authority.
- **Group requests (add-on):** A group request is sent within one F2 installation, but between different authorities.
- External requests (add-on, available in Danish): An external request is sent between F2 systems, i.e. across installations.

#### **Internal requests**

A internal request is always sent to users or units within one F2 authority.



Figure 1. Internal request from a user to a user/unit within one F2 authority

You can read about how to create and send a request, receive and respond to requests, as well as advanced functions for requests. You can also learn how to get an overview of requests in your F2.

# **Create request**

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



Figure 2. Creating a new request

You can only create requests on a record while its status is "In progress". Once the record is completed, the "New request" menu item will be deactivated.

The "New request" dialogue opens.

R. New request				x
🖘 Send request 🛛 🧐 Send and allocate responsibility	🔒 Save request	📋 Delete request	🔅 Advanced 🕶	
Recipients (?)				
Request recipient 2				
Who can see the request? ①				
Recipient's unit 💌				
Туре				
Select request type				
2				
Request deadline				
Request, internal deadline				
<u> </u>				
Return to				
Stanley Matthews (Department secretary, Set 28)				
Also notify me when the request is executed				
Standard description				
▼	🖞 🕤 🖻 Calibri	▼ 12	• b / u	

Figure 3. A new request

NOTE

The dialogue contains the following fields:

Field	Description			
"Recipients"	The user(s) to receive the request. If you add more users, F2 creates a separate copy of the request on the record for each recipient. You can also add units as recipients.			
"Who can see the request?"	Choose who can view the request:			
	• Recipient			
	Recipient's unit			
	Everyone with access to the record			
	<b>NOTE</b> Users with write access to the request record will be able to view the request regardless of the visibility you choose.			
"Туре"	Indicate the type of work you are requesting. Click the <b>drop-down</b> <b>arrow</b> to display a list of available request types. Your options depend on the setup of F2.			
"Request deadline"	The date (and, optionally, time) indicating the deadline of the request's execution. The deadline affects how and where the request appears in the lists of requester and recipient, allowing users in the organisation to sort requests by deadlines. Enter a date, click on the calendar icon, or write e.g. "+7" to set the deadline to seven days.			
	When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the approval and the approval record if there is no internal deadline. It is possible to configure which fields are automatically filled in when creating records and approval records. Read more here.			
"Finalise request when deadline is exceeded"	Tick the box to automatically finalise the request if the deadline is exceeded. The log will indicate that the request has been automatically finalised due to the exceeded deadline.			
"Request, internal deadline"	The requester, recipient, or executor may add an internal deadline to a request.			
	The internal deadline is meant primarily for use by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed.			
	When an approval and its accompanying record is created as a reply, the request deadline is suggested as the deadline for the			

Field	Description			
	approval and the approval record if there is no internal deadline. It is possible to configure which fields are automatically filled in when creating records and approval records. Read more here.			
"Return to"	Shows to whom the request is sent upon execution. When the request is created, the requester is automatically added to this field. If the requester does not want to receive the executed request, they can specify another user here before sending the request.			
"Also notify me when the request is executed"	Tick this box to have the request appear in the inboxes of the requester and the user specified in the "Return to" field upon execution.			
	An organisation can choose whether to automatically tick the box "Also notify me when the request is executed". This is done through a configuration performed in cooperation with cBrain.			
"Standard description"	Choose between text templates with predefined texts. The chosen template text is inserted in the description field.			
	<b>NOTE</b> If no standard description templates have been created, this field will not be displayed when the request is opened. Templates are created on the server by cBrain.			
[description]	Text informing the recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.			
	If description templates are not available - or none have been selected - the requester can describe the task they request help with.			

#### Save or send request

Click **Save request** to create the request. If a request is created with incorrect information, it can be deleted by clicking **Delete request**.



Requests can be edited by clicking on **Edit request** up until it has been accepted by the recipient.



When the request has been sent, the recipient receives the request in their inbox in F2. Any additional recipients receive the record with a copy of the request in their inboxes.

### The request log

After the request has been sent, a log of performed actions appears in the upper right corner of the request window. The log is updated when the request is sent, edited, replied to, etc.

		-		×
Decline request	→ Forward request	ф А	dvanced	•
Status: Sent				
Type: Minister re	ply			
Visibility: Restric write a	ted to the request recipier ccess to the record	nt's unit	and users	s with
Request deadline	e: 10-07-2023			
Recipient: Minist	ry			
Return to: Stanle the m	y Matthews (Department anagement)	secretar	y, Secreta	riat of
Log				
Stanley Matt managemen 06-07-2023	thews (Department secreta it) sends the request to Mi 08:18	ary, Secr inistry.	etariat of	the
Stanley Matt managemen 06-07-2023	thews (Department secreta t) creates the request. 08:18	ary, Secr	etariat of	the
Figure	6. The request log a	fter cr	reation	

#### Allocate responsibility for the request record

By default, the record creator is responsible for the record to which the request is linked. If the record creator clicks **Send and allocate responsibility**, the request recipient is set as the responsible user or unit.



Figure 7. Send request and allocate responsibility for its record

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

**NOTE** You can only allocate responsibility for records to which you have full write access.

### **Access the request**

When a request is created, it can be seen and accessed from the record to which it is linked. Open the request by clicking the request button above the document area in the record window. A dropdown menu opens from which you can open the request.

🔲 Requests 💌	
Requests	0 unread by 2
Involved	
#123 Politics Executed We request any material your office ma upcoming press release.	Request deadline 10-07-2023: ay have produced that are relevant for our
#124 Ministry Accepted with comment We would like to request a statement of in the upcoming press release.	Request deadline 10-07-2023: o from Mrs Moore regarding this case to use
Open request	

Figure 8. Click the request button to see the request overview

The drop-down menu also shows each request's request number, deadline, request recipient(s), status, and the first part of the description for each request. Request numbers are assigned automatically and chronologically.

#### **Cancel request**

If the request has already been sent, it cannot be deleted, only cancelled. Cancel a request by clicking **Cancel request**.



Figure 9. Cancel a sent request

# **Receiving requests**

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

₹								cBra
F2 Main window Settings	Help							
Go to Go to case ∗ record ∗ Navigation	<ul> <li>Q New Digital Post</li> <li>New e-Boks</li> <li>ral Rew output manager</li> <li>New</li> </ul>	🖺 New FOI request 🖾 New M4 mail	New chat •	Reply T Reply Reply Reply Reply Reply	all ▼ ard in calendar	🕉 Arch 🗲 Rem 💥 Dele	hive nove from li ete record Remove	st Flag: Deadlin
▲ Inbox (Politics)       +         ▲ 愛 首 愛 首 Show records       Show cases         Show records       Show cases								
Search in lists	Search for records here					C	🔨 🍸 Fi	lter 👻 💐
🔺 🜟 Favourites	Title		Lett	er date	Sorting date	t	From	
📥 Inbox (Politics) (1)	✓ Sorting date: Today, 1	unread						
⊿ 🛄 Standard	i) Press relea	ase			06-07-2023	07:28	Stanley N	latthews
Archive	✓ Sorting date: Older							

Figure 10. A request in the recipient's inbox

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

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

🔲 Request #124	_ = ×
<ul> <li>Accept request</li> <li>Accept request with comment</li> </ul>	😢 Decline request 🛛 🔿 Forward request 🛛 🌣 Advanced 🗸
We would like to request a statement o from Mrs Moore regarding this case to use in the upcoming press release.	Status: Sent Type: Minister reply Visibility: Restricted to the request recipient's unit and users with write access to the record Request deadline: 10-07-2023 Recipient: Ministry Return to: Stanley Matthews (Department secretary, Secretariat of the management)
	<ul> <li>Log</li> <li>Stanley Matthews (Department secretary, Secretariat of the management) sends the request to Ministry. 06-07-2023 08:18</li> <li>Stanley Matthews (Department secretary, Secretariat of the management) creates the request. 06-07-2023 08:18</li> </ul>

Figure 11. The received request

The recipient has the following options upon receiving the request:

- Accept the request
- Accept and comment on the request
- Decline the request
- Forward the request.

### Accept the request

Click on **Accept request** to accept the request. Once the request is accepted, you can reply in various ways.

The request recipient or receiving unit is automatically set as the request executor. It is possible to change the request executor later.

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

ine	Select date 📅 🏠 Advanced 🔹
St	tatus: Accepted
Ту	/pe: Minister reply
Vi	isibility: Restricted to the request recipient's unit and users with write access to the record
Re	equest deadline: 10-07-2023
Re	ecipient: Ministry
Re	eturn to: Stanley Matthews (Department secretary, Secretariat of the management)
Lo	og
L(	Myles McDougall (Case manager, Ministry) accepts the request. 06-07-2023 08:37
L(	<ul> <li>Myles McDougall (Case manager, Ministry) accepts the request. 06-07-2023 08:37</li> <li>Stanley Matthews (Department secretary, Secretariat of the management) sends the request to Ministry. 06-07-2023 08:18</li> </ul>

#### Accept and comment on the request

Select **Accept request with comment** to open a dialogue where you can comment on the request. This can be useful, for example, if you need to formally specify the conditions for accepting the request.

Accept with comment		<b>_</b> ×
You are accepting the request #125 on the record 'New of of the request will be notified in their inbox.	ffice chair' with a cor	mment. The sender
<u>C</u> omment		
<u>1</u>		
	Accept	Ca <u>n</u> cel

Figure 13. Write a comment in the text field

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

Request recipient or receiving unit is automatically set as the request executor after clicking **Accept request with comment**. It is possible to later change the request executor.

The comment will appear in the log and the request creator will be notified in their inbox.

ine	Select date 📅 🛱 Advanced 🛪					
S	tatus: Accepted with comment					
Ţ	Type: Minister reply					
V	isibility: Restricted to the request recipient's unit and users with write access to the record					
R	equest deadline: 10-07-2023					
R	ecipient: Ministry					
R	eturn to: Stanley Matthews (Department secretary, Secretariat of the management)					
L	og					
	Myles McDougall (Case manager, Ministry) accepts the request with the following comment: "The minister is on holiday, and I cannot guarantee an answer before the deadline." 06-07-2023 08:37					
5	Stanley Matthews (Department secretary, Secretariat of the management) sends the request to Ministry. 06-07-2023 08:18					
6	Stanley Matthews (Department secretary, Secretariat of the management) creates the request. 06-07-2023 08-18 Figure 14. The comment appears in the log					

Once the request is accepted, you can respond to it in various ways.

### **Decline the request**

Click on **Decline request** to remove the recipient from the request. The request creator will be notified. It is possible to add a comment when declining the request.

😢 Decline request		_ ×
You are declining the request #125 on the record 'New offi receive a notification in their inbox.	ce chair'. The sende	er of the request will
<u>C</u> omment		
F2 is the wrong channel for this request		
æ		
	<u>D</u> ecline	Ca <u>n</u> cel
		_

Figure 15. Optionally add a comment when declining the request

#### Forward the request

Click on **Forward request** to select a new user or unit as the recipient of the request.

→ Forward request -	×
You are forwarding the request #125 on the record 'New office chair'. Choose a new request recipient. If the new recipient declines the request, the original requester will receive a notification in their inbox.	:
Recipient	
Ayanna Asad (Case manager, Administration) 🔻 🙎	
Allocate record responsibility to the recipient	
<u>C</u> omment (optional)	
I believe this one's for you	
<u>F</u> orward Ca <u>n</u> cel	

Figure 16. Forward request

If the new recipient declines the request, the original request creator is notified.

# **Answer requests**

Once accepted, you can reply to a request in one of three ways:

- Create and send an answer record.
- Send an existing record as the answer.
- Comment, and mark the request as executed.



Update the executor if someone else is to answer the request.

#### Create an answer record

Reply to the request with an answer record by clicking **Create answer record**.



Figure 18. The answer type dialogue

It is possible to create an answer record with or without an approval attached. The latter can be useful for requests involving e.g. the head of a unit.

Regardless, the "New record" dialogue opens with "Re: [Request name]" in the "Title" field. If the request record is attached to a case, F2 suggests attaching the answer record to the same case.

NOTE The dialogue "Choose answer type" will only appear if the F2 Approvals add-on is installed and F2 has been configured to display it. Configurations are performed in cooperation with cBrain.

📮 Ne	New record ×							
Create a n You can as	Create a new record. You can assign the record to a case now, or do it later.							
Title:	Re: Budget documentation from Finance	e						
Case:	2022 - 14 🕶	🖌 Use case nu	umber (2022 - 14)					
Deadline:	21/06/2022	Remind date:		7				
Record a	ttachments							
	cord: Budget documentation from Financ not attach	e						
Inclu	ude attachments from the current record							
🔿 Atta	ach a copy of the current record							
🔿 Atta	ach current record as pdf							
Relate the new record to the current record								
🐼 Add ap	oproval							
			OK	Cancel				

*Figure 19. When "Answer record" is selected in the "Choose answer type" dialogue* 

The option to "Include attachments from the current record" is selected by default.

It is possible to configure a default setting for how the request record is attached to the answer record. The configuration allows for pre-selecting either "Include attachments from the current record", "Attach a copy of the current record" or "Attach current record as PDF" in the "New record" dialogue. The user can change the setting afterwards. Configurations are performed in cooperation with cBrain.

When you create a regular record without approval as an answer to a request, the request deadline is suggested as the deadline for the record.

It is possible to configure which deadlines should be transferred as record and approval deadlines or reminder dates. Read more here.

You can add an approval to the answer record at this step by clicking **Add approval** at the bottom of the dialogue.

Click  $\boldsymbol{\mathsf{OK}}$  to create the answer record.

#### Create an approval record as answer record

When you choose an approval as the answer type, the request deadline is suggested as deadline for the answer record and the internal deadline as the approval deadline.

It is possible to configure which deadlines should be transferred as record and approval deadlines or reminder dates. Configurations are performed in cooperation with cBrain.

🔒 Ne	New record ×							
Create a n You can as	new record. Issign the record to a case now, or do it later.							
Title:	Re: Budget documentation from Finance							
Case:	2022 - 14 ▼ 🔃 🗹 Use case number (2022 - 14)							
Deadline:	21/06/2022 🗮 Remind date:	7						
Record a	attachments							
Current re	ecord: Budget documentation from Finance							
	not attach							
Incl	lude attachments from the current record							
🔿 Atta	ach a copy of the current record							
🔿 Atta	ach current record as pdf							
🖌 Relate	e the new record to the current record							
Approva	al 🕽							
Approval t	template: New empty approval flow	•						
Approval of	deadline 21/06/2022 🛱 23:59							
🖌 Create	te record document							
	OK	Cancel						

Figure 20. When 'Approval' is selected in the 'Choose answer type' dialogue

Click **OK** to create the answer record.

If the answer record contains an approval, the request log can be configured to show when the answer record's approval has been approved. A line is added to the log, and the request status changes to "Executed".

### Send answer record

The answer record is automatically addressed to the user in the "Return to" field. They receive it in their inbox once the request recipient clicks **Send** in the ribbon of the record window.

-							
F2	Rec	ord	Advance	ed Participa	nts He	elp	
Go to mai window N	n O reco lavigatio	pen the ord's case	Edit	← Cancel X Delete record Edit	Archive and close	Send • Delivery	Set record to 'Complete' Status
<u>T</u> itle:		Re: Press release					
<u>F</u> rom:		Pouria Pasdar (Case manager, Politics)					
T <u>o</u> :		Stanley Matthews (Department secretary, Secretariat of the management) 💌					
<u>Cc</u>							
<u>Xbc</u>							

Figure 21. Click **Send** in the ribbon of the answer record

Once the answer record has been sent, the user listed in the "Return to" field receives both the answer record and the request record in their inbox. The request is then considered executed and marked accordingly.

NOTE

It is possible to configure when the request should be marked as executed. This can be done by sending the answer record, by final approval of the answer record's approval, or by either sending or approving in any order. Configurations are performed in cooperation with cBrain.

#### Navigate between request and answer records

Navigation between the answer record and the record to which the request is linked is facilitated in the answer record's ribbon. Click the **Go to request** menu item to open the record with the request.



Figure 22. Open request from the answer record

You can also open the answer record from the request itself by clicking **Open answer record** in the request dialogue.



### Select a record as answer to a request

It is possible to reply to a request with an already existing record. Click **Select answer record** in the request to open a search window.



Select the relevant record and click **OK**.

You can also right-click a record in the main or case window that will serve as a reply and click **Select as answer record to a request** in the context menu.

D; 🖾 🗘 🔁 🖻 🗉 🗉		
F2 Main window Settings	Administrator Help	
Go to Go to case + record + Navigation	Image: Mew Digital Post       Image: New FOI request       Image: New FOI request	] ly
My inbox +		
📥 😫 🗏 😴	Show records Show cases Show documents	
Search in lists	Search for records here	
★ Favourites	Title Letter date	2
⊿ 🔳 Standard	✓ Sorting date: Older	
Archive	Conference presentation 23-06-202	11
📥 My inbox	Open record	11
💟 My desktop		11
🖳 My archive	Re: S Forward	11
✓ My sent records	Reg 🖂 Mark as unread	
My chatted records	Personal control: Chester Clarkson	1 1
Outbox	Flag (Me)	
Approvals     Ma Basada	Rec Flag (Quality)	
My Records	Rol X Delete record	
	O     Son     Son     Move to private     Move to library	
Image: Provide the second s	Re:	
🐉 Personal searches	Dat Show access information	
	🗋 🕕 Mo 💼 Add record to case	
<ul> <li>Linbox (Quality)</li> </ul>	📀 🕕 Thu 🛇 Add keywords	
Desition (Quality)	Stat	51
Figure 25. Selecting	an existing record as an answer record	- 1

The "Select request" dialogue opens, displaying a list of requests you can answer. Choose the relevant request from this list and click **Attach as answer**.

Select re	quest		_ = ×
Choose the reque	st that you wish to mark the record as a reply to.		
Choose the reque Request number 123 93 42 13	st that you wish to mark the record as a reply to. Description We request any material your office may have produced th This is a request for information regarding any quality conc We need an overview of your talk at the August seminar, b This is a draft for a new bill proposal	Recipient Politics Brian Baxte Politics Pouria Pasc	Preview of request #123         Status: Accepted         Type: No type selected         Visibility: Restricted to the request recipient's unit and users with write access to the record         Request deadline: 10-07-2023         Recipient: Politics         Return to: Stanley Matthews (Department secretary, Secretariat of the management)         We request any material your office may have produced that are relevant for our upcoming press release.         Please see the record and its case for additional details.         Log         ✓ Pouria Pasdar (Case manager, Politics) accepts the request. 06-07-2023 07:16         ✓ Stanley Matthews (Department secretary, Secretariat of the management) sends the experiment politics
			05-07-2023 13:53

Figure 26. A record is attached as an answer to a request

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

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

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

When the record has been selected as an answer record, it appears in the unit inbox of the "Return to" user.

Back in the request dialogue, click **Execute request**. The request is then considered executed.



Figure 27. The "Execute request" menu item

### Answer and execute by comment

If it is not necessary to answer with a record, you can answer the request with a comment.



Click on **Add comment** in the request dialogue to open the "Add comment" dialogue. Write the comment in the text field and, if relevant, mark the request as executed. Multiple comments can be added to the same request by different executors. After clicking **OK**, the comment will be visible in the request log.

If the request is marked as executed, it will be sent back to the "Return to" user. Further actions cannot be taken on the request afterwards.

This way, the comment constitutes the answer to the request.

Add comment			<b>_</b> ×
Answer the request using a comment. Requests of executors. Comments are displayed in the log.	an conta	in multiple commen	ts from different
This request has been answered as part of a			
different request. See: f2p://dossier/45106			
Execute request ②			
		<u>O</u> K	Ca <u>n</u> cel

Figure 29. Write a comment to answer the request and, if relevant, execute it

### **Update request executor**

Click on **Change executor** to open the "Change executor" dialogue. Here it is possible to select a new request executor and make the new request executor responsible for the record (requires full write access to the record). It is also possible to add a comment.

The new executor will be able to access the request, its record, and any associated answer records.

Schange executor		<b>_</b> ×				
You are changing the executor of the request. The selected user will gain access to the request, the record 'Press release' and any answer record on the request.						
Executor						
Politics 🕶 😫						
Allocate record responsibility to the executor						
<u>C</u> omment (optional)						
The Politics office is better suited for answering these types of requests						
2						
	C <u>h</u> ange	Ca <u>n</u> cel				

Figure 30. Update request executor

# Finalise a request

The executed request is sent to the "Return to" user's inbox. The request is then finalised by this user.



Figure 31. Finalise request and, if relevant, evaluate

If the reply to the request is satisfactory, click **Finalise request**.

Click **Finalise request and evaluate** to open the dialogue of the same name. Then select a relevant evaluation in the "Evaluation" field's drop-down menu. In the "Evaluation comment" field, you can add a supplementary remark. Click **Finalise** to finalise the request.

💽 Finalise request and evaluate 🗕						
You are finalising the request with an evaluation. Select an comment.	evaluation and add a	n execution				
Evaluation						
Excellent						
<u>C</u> omment (optional)						
	<u>F</u> inalise	Ca <u>n</u> cel				

Figure 32. Finalise and evaluate a request

**NOTE** The **Finalise request and evaluate** button is not visible by default, but must be enabled through a configuration. Configurations are performed in cooperation with cBrain.

Once the request is finalised, it is registered in the log.



The request's evaluation and evaluation comment, if any, then become visible to the request recipient.

NOTE	The request creator can always finalise the request regardless of its progress. The
	request icon will then be changed to "finalised" 🙍.

**NOTE** It can be configured whether all users or only employees in the request creator's unit can finalise a request.

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

Finalised requests can still be viewed and accessed in F2's main window. Read more about the default lists and searching for finalised requests in Request overview in F2.

### Finalise requests from the result list

You can process requests via the context menu when the showing requests in the result list. Choose between:

• Finalise request

• Finalise request with evaluation.

Sh	iow records	Show cas	ses	Sho	w	documents	Sh	ow requests	
S	earch for requests	here							
	Request number	Reque	st dea	adli	t	Request, intern		Recipient	
~	Request deadline	Future							
	124	10-07-	2023					Ministry	
	123	10-07-	2023				_	Politics	
~	Request deadline	Older		Open					
2	81	27-01-	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Open o Finalise Finalise	e re e re	es equest equest and evaluate	2	Digital Secretariat o	

Figure 34. Process the request directly from the context menu

### Automatically finalise request if deadline is exceeded

If the checkbox **Finalise request when deadline is exceeded** is checked in the "New request" dialogue, the request will be automatically finalised when the deadline is exceeded.



✓ Finalise request when deadline is exceeded ⑦

Figure 35. Automatically finalise if deadline is exceeded

The log will indicate that the request has been automatically finalised.

Log

The system has finalised the request and added a comment: "The system finalised the request because the deadline was exceeded." 01-08-2023 12:00

Figure 36. The log shows that the request has been finalised due to deadline exceeded

# **Advanced functions**

F2 Request offers a number of extra, advanced functions.

The available functions depend on the user and the status of the request. The table below lists each extra function.

Click on **Advanced** in the request dialogue to choose between the advanced features.



lcon	Function	Description
7	Copy request	Create a copy of the request on the same record. The copy will have the same content and setup, but a new request number.
C	Export	Export and save the request on the PC.
8	Print request	Print the request to PDF.
	Create info mail	Create an email with the request attached to inform a third party of the request. The attachments include the record metadata and any documents.
<b>.</b>	Execute request	Mark the request as executed. The user or unit listed in "Return to" will be notified that the request has been executed.
**	Evaluate request	Evaluate the quality of the received request. Add the evaluation in the "Evaluation" field and optionally provide a supplementary comment in the "Comment" field.         Image: Second
£9	Switch to requester/'Return to' view	View the actions available to the creator or "Return to" of the request. The functionality is only available if you are both the recipient and sender of the request, for example, if you send a request to a unit that you are a part of.

lcon	Function	Description
	now	Finalise the request immediately, even if it has not been processed by the executor.

# **Request overview in F2**

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

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

### **Standard request searches**

F2 comes with two standard request searches:

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

These standard searches are located in the "Units searches" list node to the left in the F2 main window.



Figure 39. The default request lists

Request recipients will see any received requests in the "F2 Requests to unit" list. This list shows records with requests that are sent to either the current user's unit, or any user with a job role in said unit.

Similarly, the "F2 Requests from unit" list contains in progress-requests sent from the current user's unit. This list shows records with requests sent by either the current user's unit, or any user with a job role in said unit.

Additionally, the sender can see the request in their "My sent records" list and the recipient can see it in their "My inbox" list.

### **Searching for requests**

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

Only advanced searches should be made in the "Archive". To perform an advanced search pertaining to requests, click the **Advanced search** menu item in the main window ribbon and then select the "Request" search group.

Request			
Creator (j)	Creator unit (j)	Request type	Request deadline (j)
Search for request creator	Search for creator units	Request type 🔹	From 7 - To 7
2	2		
Request, internal deadline $(i)$	Request number	Description	Recipient (j)
From 7 - To 7	Search for request number	Search for description	Search for request recipients
Recipient unit (j)	Executor (j)	Current request status	Executed
Search for recipient units	Search for request executor	Created	Request completed?
-	-	Sent	
		Edited 🔻	
Return to (j)	Approved		
Search for request return to	Request approved?		
-			

Figure 40. Advanced search for requests in the "Archive"

#### The "Request" search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
"Creator"	User Unit Me My unit	Search for requests created by the specified user/unit.
"Туре"	Predefined request types managed by an administrator.	Search for requests based on type.
"Deadline"	Date Yesterday Today Tomorrow Undefined +[no. of days] -[no. of days]	<ul> <li>Fill in one or both date fields. Use + and - to define a dynamic period starting or ending a number of days from today.</li> <li>Search for requests with a specific deadline.</li> </ul>
"Request, internal deadline"	Date Yesterday Today Tomorrow Undefined +[no. of days] -[no. of days]	Fill in one or both date fields. Use + and - to define a dynamic period starting or ending a number of days from today. Search for requests with a specific deadline.
"Description"	Search string	Search for requests whose description contains the specified search string.

Search field	Possible values	Description
"Executor"	User Unit Me My unit	Search for requests for which the specified user/unit is the executor.
"Executed"	Yes No	Search for requests that either have or have not been executed.
"Return to"	User Unit Me My unit	Search for requests to be returned to the specified user/unit.
"Approved"	Yes No	Search for requests that either have or have not been approved.

### List display options

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

<b>▼</b>						cBrain AcCloud0	2		
F2         Main window         Settings           Go to         Go to         Go to         Rew email           Go to         Go to         Rew email         New docun           Navidation         record         New appro         New appro	Help   New Digital Post  New e-Boks  New output mana  New	🕞 New FOI request 🙀 New M4 mail ger	New chat •	Reply all * Forward Popen in calendar Reply Reply	<ul> <li>Archive</li> <li>Remove from list</li> <li>Delete records *</li> <li>Remove</li> </ul>	Flag: Select flag Deadline: Me	Flag: 9	Select flag	Prin
Archive +									
	Image: Show records       Show cases       Show requests								
Search in lists	Search for requests here	2					<u>v</u> []	Search criteria	Ť
★ Favourites	Request number	Request deadli ↓	Request, i	ntern Recipient	Executor	Request type	Request created	Request crea	ati
⊿ 🔳 Standard	✓ Request deadline: Ol	der						9 item(s)	)
Archive	2 117	05-07-2021		Ayanna Asad		See text below	02-07-2021 12:59	Amina Salim	a
📥 My inbox	87	11-06-2021		Administration			10-06-2021 14:03	Ireene Todd	
🚺 My desktop	R 41	21 07 2016		Alexandri Alexandri		F	14 07 2016 12:25	Hadaala D	
	Fiai	Ire 41 Col	umn	ns in the real	iest list vi	Ω  <i>\</i> /			

Figure 41. Columns in the request list view

Certain columns are helpful when it comes to keeping track of requests, e.g. "Recipient", "Request deadline", and "Executor".

### Request columns in the record view

Column	Description
"Request"	Shows whether there is a request on a record.
"Request completed"	Shows whether the record's request has been marked as completed.
"Request created by"	Shows the user who created the request.
"Request deadline"	Shows the deadline for the request set by the creator.
"Request execution date"	Shows when a request was executed.
"Request executor"	Shows the user or unit that executes a request on a record.
"Request recipient"	Shows the user or unit set as the request recipient.
"Request reply date"	Shows when a request has been replied to (when the answer record was sent).
"Request status"	Shows whether the request is:
	• Sent
	Accepted
	Cancelled
	Executed
	• Completed.
"Request text"	Shows the date and time for when the request was sent.
"Request type"	Shows the content of the text field of the request.
	Request types may vary between organisations as <b>NOTE</b> the request types are created at the organisational level.
"Request, internal deadline"	Shows the request recipient's own deadline.

## Columns in the request view

Column	Description
"Case No"	Shows the number of the case on which a record with a request is located.
"Case title"	Displays the title of the case.
"Deadline"	Displays the deadline for the request set by the creator.
"Executor"	Displays the user or unit that executes a request on a record.
"lcon"	Displays the request icon.
	Read more about icons and their variations in the Request icons section.
"ID"	Displays the ID of the request.
"Request, internal deadline"	Displays the request recipient's own deadline.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Recipient"	Displays the user or unit set as the request recipient.
"Record recipients"	Displays any recipients who received the request as an email.
"Record sender"	Displays the sender if the request was sent as an email.
"Record title"	Displays the current title of the record.
"Request created"	Displays the date and time of the request's creation.
"Request created by"	Displays the user who created the request.
"Request sender"	Displays the name of the user who sent the request.
"Request sent"	Displays the date and time the request was sent.

Column	Description
"Case No"	Shows the number of the case on which a record with a request is located.
"Case title"	Displays the title of the case.
"Deadline"	Displays the deadline for the request set by the creator.
"Executor"	Displays the user or unit that executes a request on a record.
"Icon"	Displays the request icon.
	Read more about icons and their variations in the Request icons section.
"ID"	Displays the ID of the request.
"Request, internal deadline"	Displays the request recipient's own deadline.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Recipient"	Displays the user or unit set as the request recipient.
"Record recipients"	Displays any recipients who received the request as an email.
"Record sender"	Displays the sender if the request was sent as an email.
"Record title"	Displays the current title of the record.
"Request created"	Displays the date and time of the request's creation.
"Request created by"	Displays the user who created the request.
"Request sender"	Displays the name of the user who sent the request.
"Request sent"	Displays the date and time the request was sent.
"Request type"	Displays the content of the text field of the request.

Column	Description	
	<b>NOTE</b> Request types may vary the request types organisational level.	between organisations as are created at the
"Unique record title"	Displays the current title of the record	and its ID.

### **Request icons**

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

Ē	i ()	Testing of job candidates	29-10-2018	10:04	Quality	2018 - 6
	The rec	ord has a request created by 'Klaus Salomon' with an internal (	deadline at	10:46	Hanne Winter	
23-11-2018. The receiver is 'HR'.		5 13:36	Vibeke Villasen			
Þ	Evaluation of potential employees			5 11:18	Hanne Winter	2015 - 3

Figure 42. Request tooltip in a result list

lcon	Description
۲.	Create new request.
	Request without deadline.
	Request with more than seven days until deadline.
	Request with less than seven days until deadline.
	Request with an exceeded deadline.
	Edited* request without deadline.
	Edited* request with more than seven days until deadline.
	Edited* request with less than seven days until deadline.
	Edited* request with exceeded deadline.
~	Executed request.
0	Cancelled request.
<b>Q</b>	Finalised request.

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

# F2 cPort MIS Request

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

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

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

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

Which data are available in cPort MIS Request depend on the authority's configuration of F2 Request and how the request types are used.

Danish documentation is available for both cPort, cPort MIS Request, and external requests.

# F2 Request configuration options

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

- Determine whether an request should be finalised when the answer record is sent and/or when the approval of the answer record is finally approved.
- Determine whether the "Return to" field should be automatically filled with the name or unit of the request creator.
- Determine whether there should be an option to evaluate the request.
- Determine whether it should be possible to select one or more types of requests.
- Determine which time should be automatically inserted in deadlines.
- Determine whether it should be possible to select answer records with and without approval. Answer records with approval require the Approvals add-on to be installed.
- Automatically tick the checkbox "Notify creator and "Return to" upon executed" when creating a new request.
- Enable the **Evaluate request** button and its associated evaluation fields. It is also possible to choose whether the fields can be filled in by all users or only the request recipient and the "Return to" user.
- Determine whether answer records can be created as regular records, approval records, or both. If both types are allowed, the user selects the appropriate type in the "Choose answer type" dialogue.
- Show internal approvals of answer records in the request log after the approval is finalised. A line is added to the request, and the request status is updated to "Executed".
- Allow a request to be finalised by all users or only by those in the request creator's unit.
- Choose the default option in the "New record" dialogue when attaching a request record to an answer record ("Include attachments from the current record", "Attach a copy of the current record", or "Attach current record as PDF").
- Determine whether the request can only be viewed by the request recipient, the recipient's unit, or all users with access to the record.
- Decide whether the fields "Request deadline" and "Request, internal deadline" should be visible in the request dialogue.
- Determine whether the fields "Request deadline" and "Request, internal deadline" should be pre-filled when creating a new request.
- Decide whether the field "Close request if deadline is exceeded" should be visible.
- Determine whether the field "Close request if deadline is exceeded" should be checked when creating an request.
- Determine whether the fields "Record deadline," "Reminder Date," and "Approval deadline" on the answer record should be pre-filled with one of the following deadlines:

- Request deadline
- Request, internal deadline
- Request record deadline.