

Request (Group)

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Introduction to F2 Group 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 request can be made 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.

Group requests

Group requests are sent between users or units in different authorities within the same F2 installation. Read more about [installations and authorities](#).

When you create a group request, F2 automatically creates a new record to which the group request is attached. When sent, a user or unit in the receiving authority receives the record with the group request. The group request is managed in the receiving authority and then returned to the sender authority.

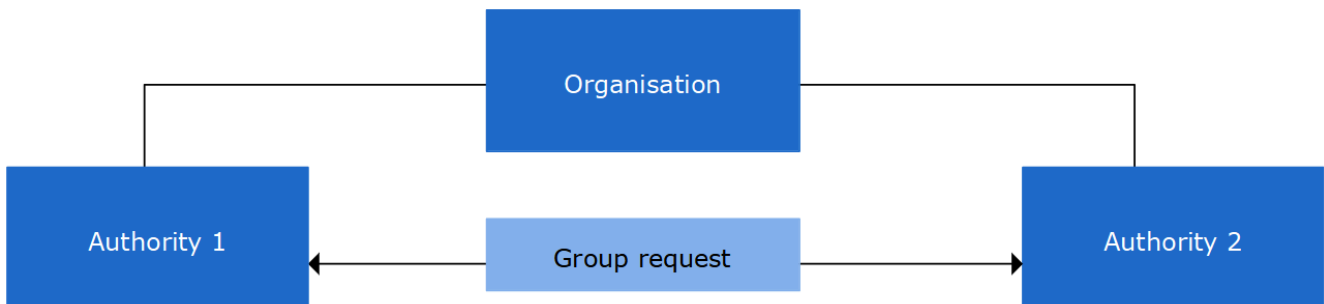


Figure 1. Group request between two authorities

Group requests are sent between authorities in the same F2 installation. However, it is possible to send a group request to an external system via a virtual authority. For more information, see [Send group requests to third party systems](#).

Create group request

The group request must be created on a record in read-only mode. Create a new group request by clicking on the down arrow next to **New request** and then on **New group request** in the drop-down menu.

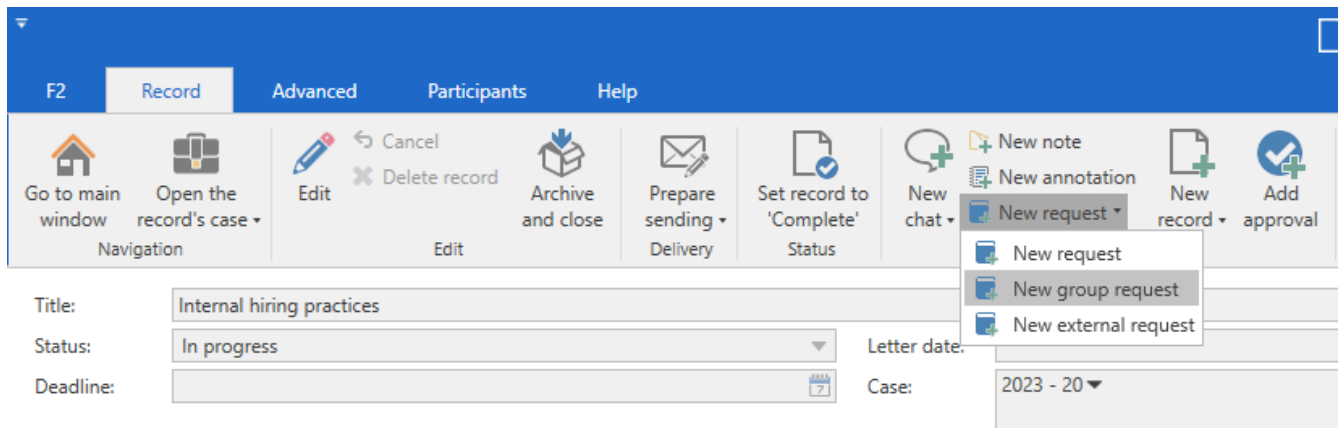


Figure 2. Creating a new group request

NOTE Requests can only be created on records with the “In progress” status. The New request menu item is deactivated for completed records.

The “Request number [no. of request]” window opens. The “Return to” field is already filled in with the request creator’s name, and the checkbox “Notify creator and ‘Return to’ upon executed” is automatically ticked.

Figure 3. The group request creation window

Fill in the following fields before sending the group request.

Figure 4. Fields to fill in

NOTE

The “Visible for unit” checkbox next to “Additional recipients (0)” only appears when a user is added to the “Request recipient” field.

No.	Field	Description
1	"Request recipient"	<p>The user or unit who receives the request.</p> <p>NOTE Group requests can only have one recipient. The recipient must be a participant from a different authority in the same F2 organisation and must have an associated email address.</p>
2	"Visible for unit"	<p>Tick this box to make the request visible to users in the request recipient's unit.</p>
3	"Request types"	<p>Click the drop-down arrow to display a list of request types. The options depend on the setup of F2. More than one option may be selected.</p>
4	"Deadline"	<p>The date (and, optionally, time) indicating the deadline of the request's execution.</p> <p>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.</p>
5	"Add internal deadline"	<p>The requester, recipient, or executor may add an internal deadline to a request.</p> <p>The internal deadline is primarily used by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed.</p> <p>The request icon changes colour depending on the internal deadline, which is suggested as the deadline for the answer record. The internal deadline is added in the same way as the formal deadline.</p> <p>The internal deadline takes precedence over the formal deadline, except in the group request log whose deadline always adheres to the formal deadline.</p> <p>The internal deadline is not synchronised. This means that the request creator's internal deadline is not visible to the request recipient nor does it affect any internal deadline set by the request recipient.</p>

No.	Field	Description
		<p>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.</p>
7	<p>“Notify creator and ‘Return to’ upon executed”</p>	<p>Tick this box to have the group request appear in the inboxes of the requester and the user specified in the “Return to” field upon execution.</p> <p>NOTE F2 can be configured to tick this box automatically. This configuration is made in cooperation with cBrain.</p>
8	<p>“Contributors”</p>	<p>In addition to the request recipient, it is possible to add one or more contributors to the group request. A contributor is a user who contributes to the execution of the group request.</p> <p>Contributors will receive the request record as an email with a copy of the group request attached as a PDF file.</p>
9	<p>“Standard description”</p>	<p>Choose between text templates with predefined texts. The chosen template text is inserted in the description field.</p> <p>NOTE If no standard description templates have been created, this field is not visible. Templates are created in cooperation with cBrain.</p>
10	<p>“Description”</p>	<p>Text informing the recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.</p>

Save or send the group request

Click **Save** to create the request. Upon creation, a log is added in the upper right corner of the request window just as with internal requests.

As with internal requests, group requests can be deleted without being sent, be cancelled after being sent, and saved continuously while the request is filled in.

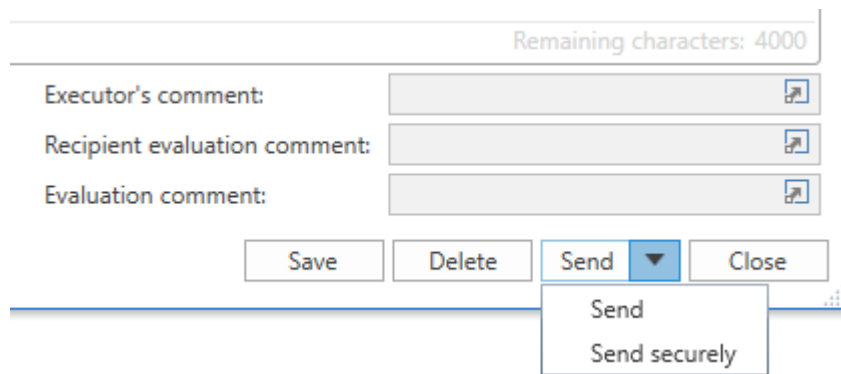


Figure 5. Request creator's options

The recipient receives the group request in their F2 inbox. Any contributors receive a copy of the request in their own inboxes.

If the request can be sent immediately, saving before clicking **Send** is not necessary. The request is automatically saved when sent.

The group request can be sent securely to a third party system through a virtual authority. To do this, click the **down arrow** in the "Send" field and select **Send securely** in the drop-down menu. Read more about [sending group requests through virtual authorities](#) and [sending securely](#).

Access group request

When a group request is created, it can be seen and accessed from the record to which it is attached. Open the group request by clicking the request icon at the top of the document area. An overview of the group request is shown. Click anywhere in the overview to open the full request window.

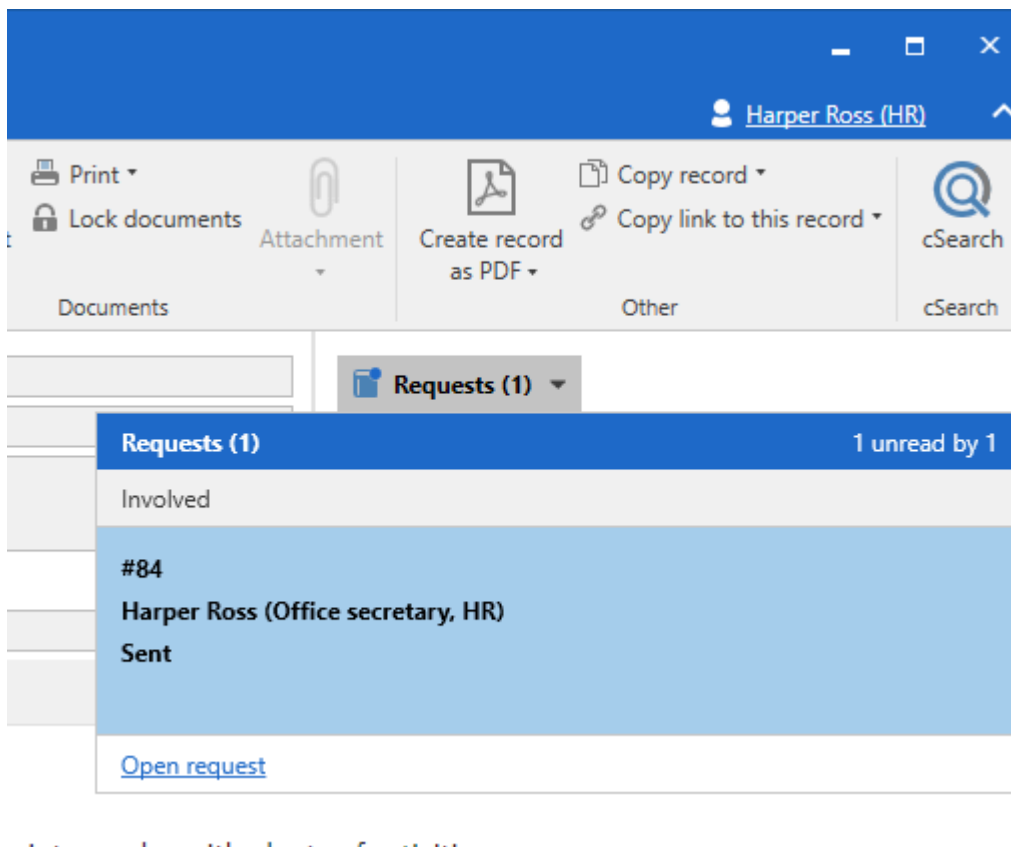


Figure 6. Click the request icon to see the request overview

The overview shows request number, deadline, request recipient(s), status, and the first part of the description for each request. Request numbers are assigned automatically and chronologically.

Group requests always have a request data file attached. The data file identifies the executed request as an answer when returned to the request creator’s authority in F2. This also applies to [group requests sent to third party systems](#).

NOTE Only one group request can be created on a record. If an additional group request or an external request is created on a record, F2 automatically creates a new record named “Request: Request: [title of the original record]” with the new group request. Any attached documents are automatically copied to the new request record.

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.

Request number 98

A group request is intended for placing a request in another authority. Creating a group request causes a forward record to be created with the group request attached. Press sent on this external request to send the request to the unit or person in the other authority you want to have the task performed. The deadline shows, when the task should be completed.

Request recipient:	Digital Quality (digi-quali@digi.gov.uk) ▼	Created by: Chester Clarkson 23-06-2021 10:29
Request types:	Office answer; ▼	Sent by: Chester Clarkson 23-06-2021 10:35
Deadline:	07/07/2021 📅 23:59 Add internal deadline	
Return to:	Chester Clarkson (Department head, Quality) ▼	

Notify creator and 'Return to' upon executed ?

Figure 7. The request log after creation

Receiving a group request

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

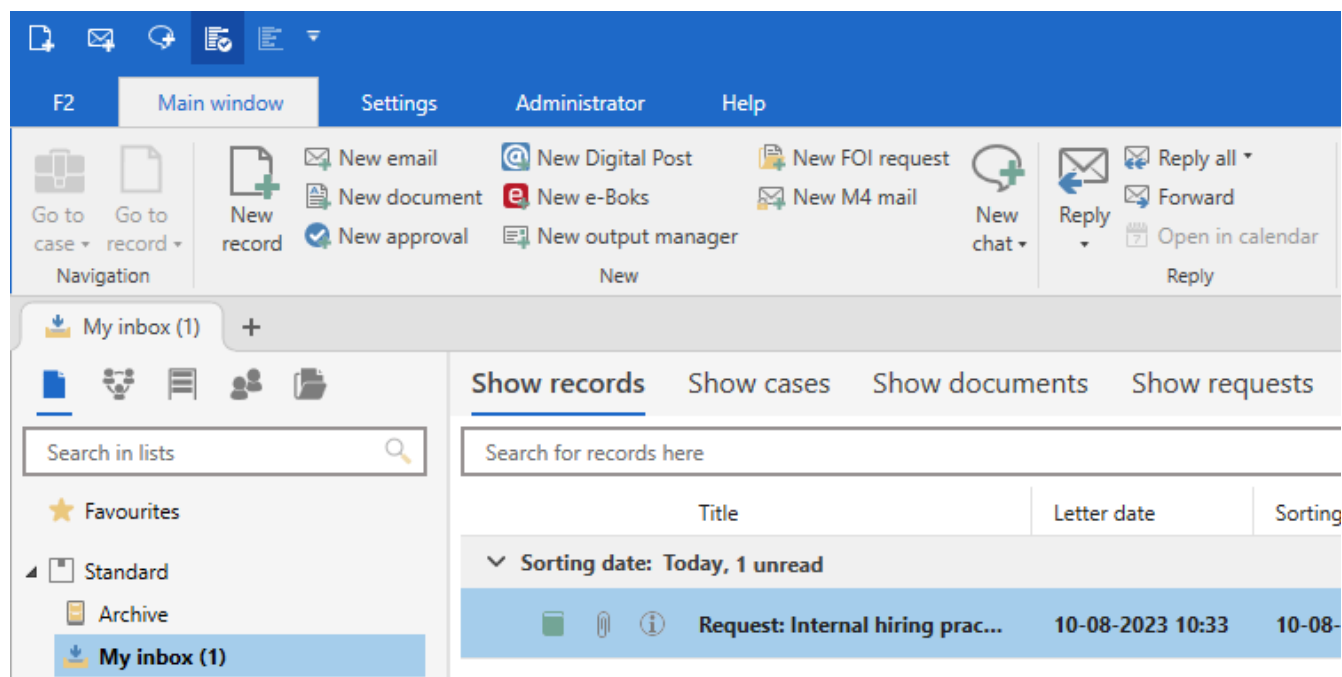






Figure 8. The received request in the recipient's inbox

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

If a record with any kind of request is unread, the request window automatically appears when the record is opened. If the request has already been accepted, it is marked as read and can be accessed by double-clicking the record's request icon.

Request number 98





A group request is intended for placing a request in another authority. Creating a group request causes a forward record to be created with the group request attached. Press sent on this external request to send the request to the unit or person in the other authority you want to have the task performed. The deadline shows, when the task should be completed.

Request recipient: Digital Quality (digi-quali@digi.gov.uk)  Created by: Chester Clarkson 23-06-2021 10:29
 Request types: Office answer; Sent by: Chester Clarkson 23-06-2021 10:35
 Deadline: 07/07/2021  23:59 [Add internal deadline](#)
 Return to: Chester Clarkson (Department head, Quality) 
 Notify creator and 'Return to' upon executed 

[Contributors \(0\)](#)

This is a request for an elaboration on your input regarding the latest quarterly report.

Remaining characters: 3911

To be executed by: Request executed by  Executor's comment: Execution comment 
 Recipient evaluation: Recipient evaluation comment: 
 Evaluation: Approved Evaluation comment: 

[Export...](#) [Create info mail](#) [Evaluate...](#)

Figure 9. The received request

Accept the request

The group request can be accepted by clicking **Accept and close** or **Accept**.

The request can be evaluated by clicking **Evaluate...** at the bottom of the window, and the request can be forwarded by filling in the “To be executed by” field and clicking **Save**.

Internal request based on a group request

If the group request recipient has access to the [F2 Request](#) add-on, they can create an internal request based on the attached data file sent by the sender authority.

To do this, click **New request** in the ribbon of the received email. This opens a new request window wherein the fields “Deadline”, “Description”, and “Return to” have already been filled in with information retrieved from the attached data file. Additionally, the “Request types” field may be filled in if the recipient authority recognises the request type(s) selected by the sender authority during creation of the group request.

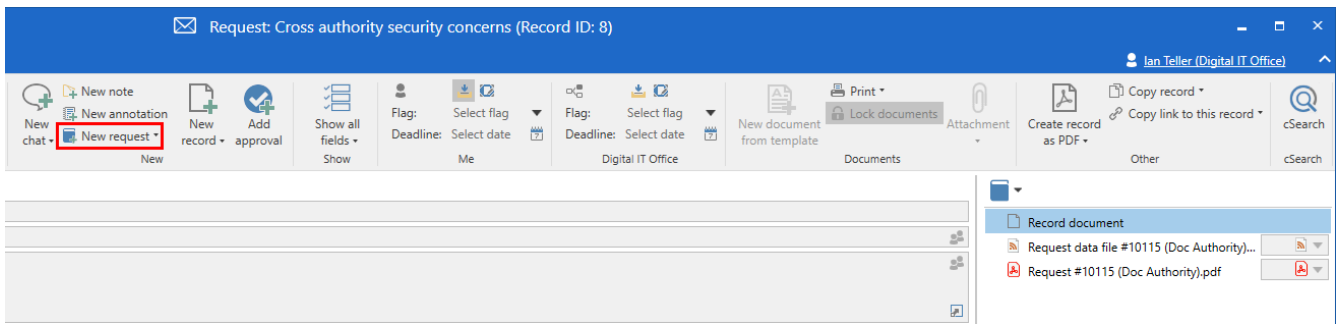


Figure 10. Creating a request based on the data file

Reply to a group request

A group request is replied to in one of the following ways:

- Execute the group request by replying to it directly in the request window.
- Reply to the request by [creating and sending an answer record](#) with **Create answer record** in the request window. The process will be further elaborated in the following section.

Note that it is possible to click **Create answer record** before accepting the request. It may be practical to begin working on it even though the terms and conditions of the request have not yet been finalised.

NOTE

It is possible to select an existing record and attaching it as an answer record. However, for group requests this function is intended for the requester and not the group request recipient. See [Selecting a record as answer to a request](#) for further information.

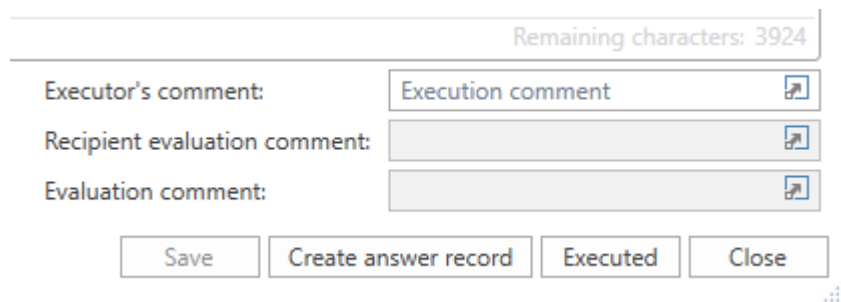


Figure 11. Reply options in the request window

Create an answer record

The request can be answered by creating an answer record. Click on **Create answer record**, and the “New record” dialogue opens. F2 automatically suggests “Re: [title of the request]” as the title of the new record. See below.

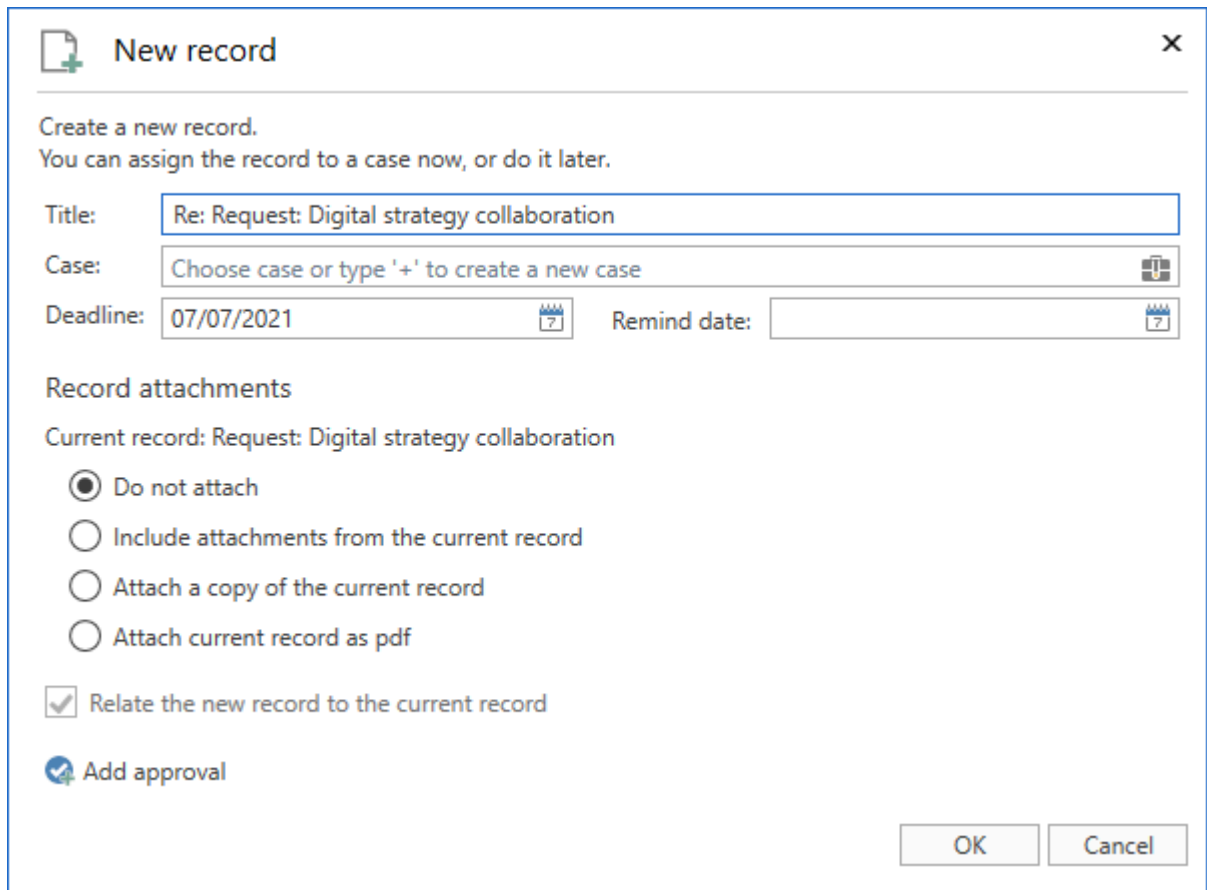


Figure 12. Creating an answer record

If the group request record is attached to a case within the recipient authority, F2 automatically suggests linking the answer record to the same case. The answer record will have the same deadline as the request. If a request has both an internal and a formal deadline, the answer record will be assigned the former. Click **OK** to create the answer record.

An approval can be added to the answer record from the dialogue. In this case, F2 suggests the request deadline or any internal deadlines as the approval deadline. For more information about creating approvals, see [Approvals](#).

The answer record is automatically addressed to the user in the “Return to” field, who receives it in their inbox when the recipient clicks **Send** in the ribbon of the record window.

Navigation between the answer record and the group request record is facilitated by a request icon in the answer record’s ribbon. This **Go to request** icon opens the record with the group request.

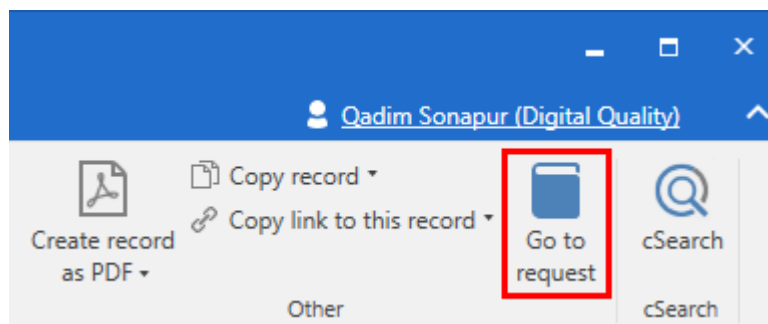


Figure 13. Open request record from answer record

Similarly, the answer record can be accessed from the group request itself. Click the record ID link displayed next to the “Answer record created” entry in the group request log to access the answer record, as shown below.

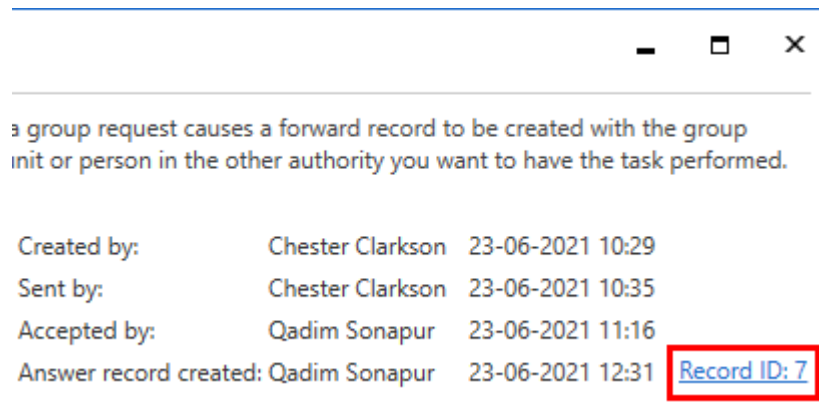


Figure 14. Link to the answer record in the request log

Once the answer record has been sent, click on **Execute** in the group request window. The user listed in the “Return to” field then receives both the answer record and the group request record in their inbox.

NOTE **Execute** indicates that the request executor/recipient has executed the requested task. The request is only completed once the request creator or “Return to” user has finalised the executed request.

An executed group request is no longer listed in the “F2 Requests to unit” list of the request recipient. Read more about this list [here](#).

Selecting a record as answer to a request

As opposed to an internal request, this function is intended for use by the “Return to” user and not the executor. It is a way for the “Return to” user to link an incoming record from the executor to the request record if the executor has not already specified it as an answer record.

Finalise a group request

The executed group request is sent to the “Return to” user’s inbox.

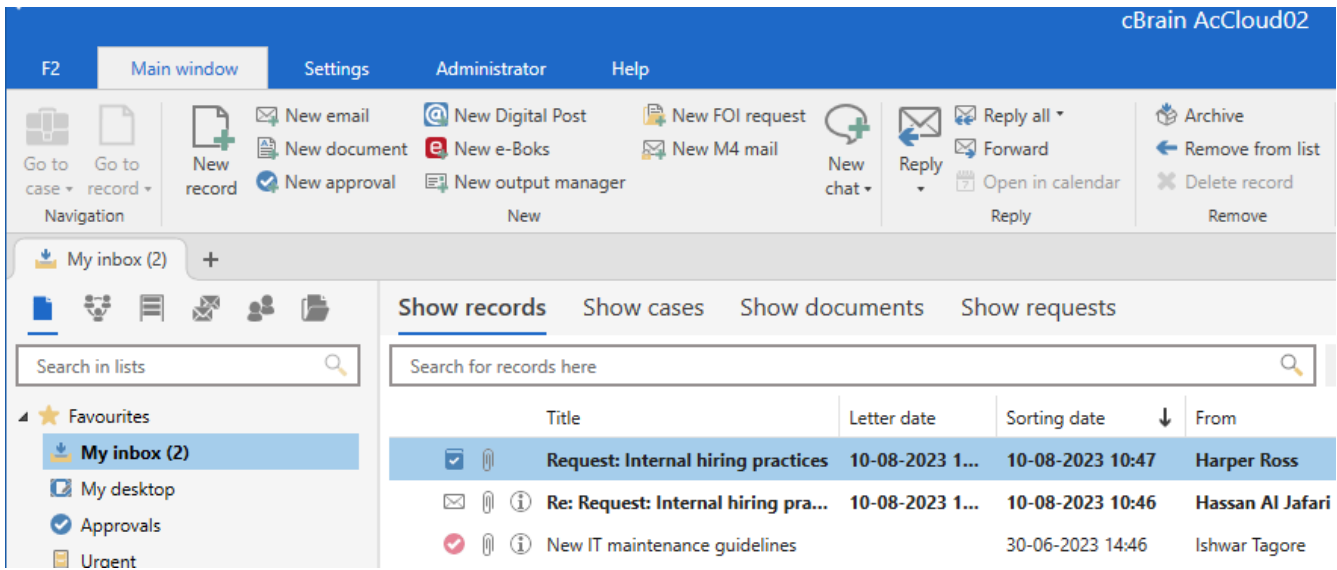


Figure 15. The executed request and answer record

If an answer record has been created from the group request window and sent as an email to the “Return to” user, said record is associated with the same case as the original request record in the requester’s authority.

The group request can then be processed by the “Return to” user with an evaluation (1), an evaluation comment (2), an approval (3), or any combination of these. This is similar to an internal request.

When the answer to the group request is processed, click **Finalise request** (4). The group request is then completed.

Request number 10115

A group request is intended for placing a request in another authority. Creating a group request causes a forward record to be created with the group request attached. Press sent on this external request to send the request to the unit or person in the other authority you want to have the task performed. The deadline shows, when the task should be completed.

Request recipient: **Ian Teller (Head of office, Digital IT Office)**

Visible for unit

Request types:

Deadline:

Return to: **Sienna Morton (Case manager, Secretariat of the**

Notify creator and 'Return to' upon executed

[Contributors \(0\)](#)

Created by: Sienna Morton 29-06-2022 09:25
 Sent by: Sienna Morton 29-06-2022 10:45
 Accepted by: Ian Teller 29-06-2022 10:57
 Answer record created: Sienna Morton 29-06-2022 11:28 [Record ID: 815](#)
 Answer record sent: Ian Teller 29-06-2022 11:28

To respond to Parliament inquiries, we request documentation of your IT security measures.

Remaining characters: 3910

To be executed by:

Recipient evaluation:

Evaluation: **1** Approved

Executor's comment:

Recipient evaluation comment:

Evaluation comment: **2**

[New deadline...](#) [Export...](#) [Copy](#) [Create info mail](#) [Remove answer](#) **3**

4

Figure 16. Request window for the executed request

NOTE

The “Before deadline” log entry, which is shown when the group request has been executed, is based on the formal deadline of the group request and not an internal deadline.

Once the “Return to” user has finalised the group request, it is registered in the log.

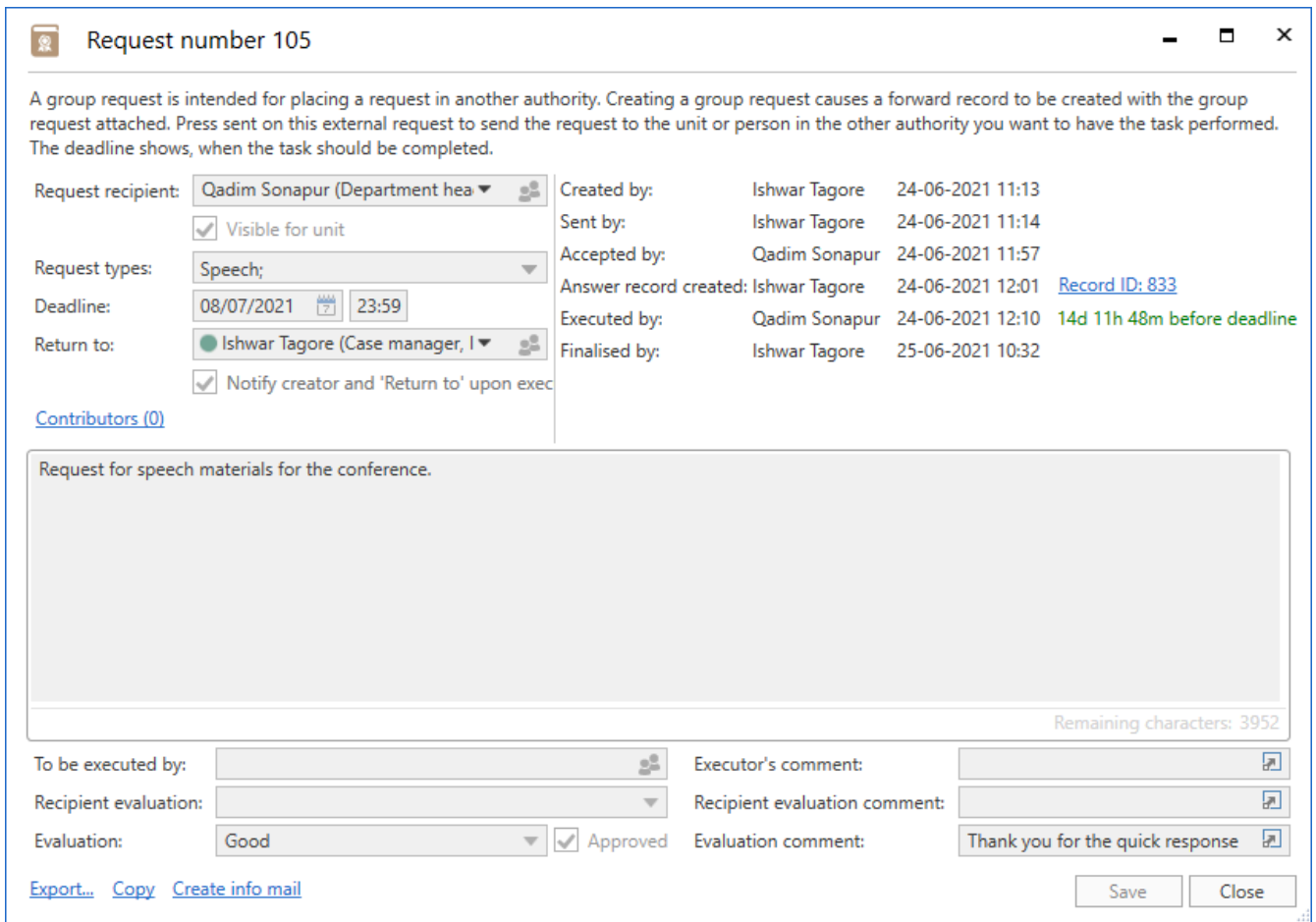



Figure 17. The finalised group request

The request's approval status, evaluation, and evaluation comment are then visible to the request recipient.

NOTE The requester can finalise the group request at any time. This changes the request icon to finalised .

NOTE F2 can be configured to either allow all users to finalise requests or only users in the requester's unit.

When the group 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. For further information about the default lists and searching for finalised requests, see [Request](#).

Send group requests to third party systems

F2 Group Request makes it possible to send a group request to systems outside of F2, i.e. third party systems. A virtual authority must be added to the F2 installation to represent the system outside F2 that is to receive the request.

When a group request is sent, it is received by the virtual authority representing the third party system. F2 then forwards the group request as an external notification email to the system outside of F2.

From here, the group request can be managed in the external system. When sent back, it is received by the virtual authority which forwards it to the sender authority in F2. For more information about setting up external notification emails, see [Administrator](#).

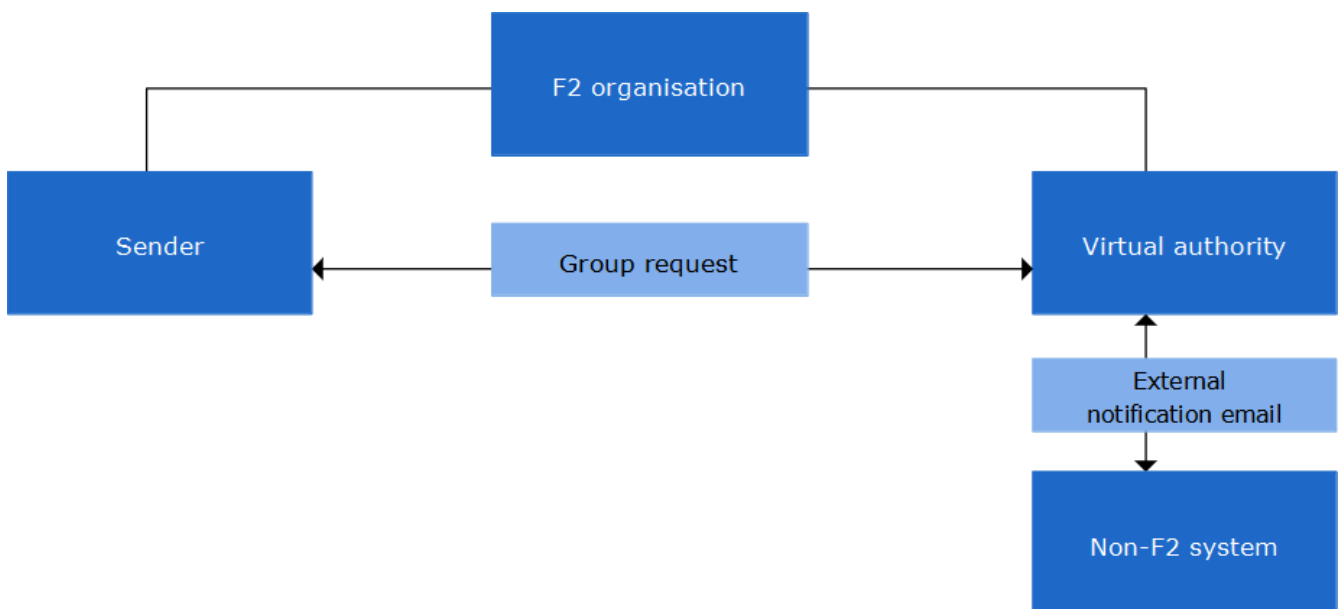


Figure 18. Group request to an external system

The option of sending a group request to a third party system makes it an effective and flexible tool for cooperation between authorities within and outside the F2 organisation. By sending a group request to an external participant's email address, users in the recipient authority are able to receive and process the group request in e.g. Outlook.

NOTE An organisation that does not use F2 can receive group requests from an F2 installation via email. When the non-F2 organisation replies to the group request, the reply is sent as an email rather than a group request.

When the request creator clicks **Send**, the group request is sent as an email with the record's documents attached.

Additionally, F2 attaches a request data file to the email. The data file makes the executed group request recognisable as a request reply once returned to the sender authority's F2.

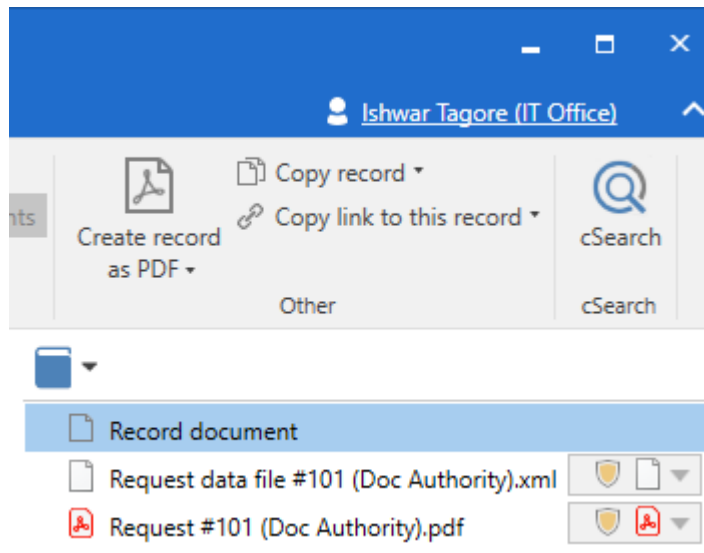


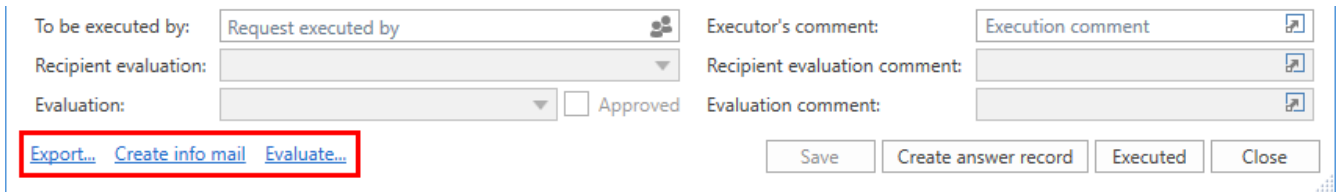
Figure 19. Request data file and request as PDF on external notification email

When the email containing the request data file is sent to F2, it is automatically recognised as an answer record. Consequently, the group request log will contain a link to the answer record, while a dedicated menu item for navigating to the group request is added to the answer record itself. For more information about answer records, see [Selecting a record as answer to a request](#).

NOTE The data file must be attached to the group request's reply sent to the sender authority's F2. Otherwise F2 cannot recognise the reply as a group request.

Extra functions

F2 Group Request offers a number of extra functions in the bottom left of the window. Which functions are available depends on the current user and the status of the request.



The screenshot shows a form with several input fields and buttons. The fields are: 'To be executed by:' with a dropdown menu showing 'Request executed by' and a group icon; 'Recipient evaluation:' with a dropdown menu; 'Evaluation:' with a dropdown menu and an 'Approved' checkbox; 'Executor's comment:' with a text input field and a copy icon; 'Recipient evaluation comment:' with a text input field and a copy icon; and 'Evaluation comment:' with a text input field and a copy icon. At the bottom left, three buttons are highlighted with a red box: 'Export...', 'Create info mail', and 'Evaluate...'. At the bottom right, there are four buttons: 'Save', 'Create answer record', 'Executed', and 'Close'.

Figure 20. Example of extra request functions

At the bottom left of the group request window, a number of extra functions are available. The available functions depend on the status of the request - for example, **Remove answer** is only available if an answer record has been added. The following functions are available to group requests:

- Finalise now
- New deadline
- New recipient
- Export
- Copy
- Create info mail
- Remove answer.

F2 Request (Group) configuration options

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

- Automatically tick the checkbox “Notify creator and ‘Return to’ upon executed” when creating a new request.
- Enable the **Evaluate...** 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.
- Use the request record’s deadline rather than the request’s deadline as record and approval deadline for the answer record, and use the request deadline rather than the request record’s deadline as reminder date.
- Allow a request to be finalised by all users or only by those in the request creator’s unit.