Signed approval

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Introduction to F2 Signed Approval

F2 Signed Approval makes it possible to merge signatures with documents and approve these in a single work flow. The add-on consists of a standard process that automates certain tasks upon the final approval of letters, replies, or other similar documents. These tasks are:

1. Adding a signature to the approved document.
2. Creating a record and preparing it for sending.

Signed approvals can be used when replying to inquiries from citizens or Parliament, or when sending letters in cases requiring a signed document.

The add-on takes advantage of a range of existing functions in F2. Phrase merging (available in Danish), document templates and approval flows are all integral parts of the process. The process is set up using the relevant signature phrases, document templates and approval flows, and the add-on supports multiple approval signing processes in the F2 installation.

When the standard process involves replying to emails, the sender can be added as a case participant automatically using F2’s case templates.

This manual consists of two main parts. The first is a detailed example of a workflow using the standard process to reply to an inquiry from a citizen. The second part describes the various setup options for signed approval standard processes.

Example: Processing inquiries

F2 Signed Approval automates specific processes that follow final approvals. F2 automatically creates a new record with a signed copy of a document from the original approval record using so-called signature phrases.

The standardised process presented in the following sections is an example of how F2 Signed Approval can be implemented. This standardised process concerns an inquiry from a citizen submitted via email to an authority.

The example presents the best practice for using the add-on module. An administrator setting up the add-on can use the example as inspiration as to how signed approvals can be used in F2.

The process consists of the following steps:

1. An inquiry is received and assigned a case.
2. The task of replying is assigned using a request.
3. The request is accepted and an answer record created.
4. A reply is written based on a document template.
5. An approval flow is started for the reply.
6. The reply is approved.
7. The answer record is sent.
8. The request is finalised.

This example involves the use of case templates and requests, but neither are strictly required to use signed approvals. Read more on the required setup of F2 Signed Approval.

The following example involves two users:

- Myles McDougall who works in the minister's secretariat and receives incoming inquiries.
- Penelope Poole who is employed in an office that handles inquiries into political questions specifically.

1. An inquiry is received and assigned a case

A citizen has sent a question to the minister. F2 is set up so that citizen inquiries are placed in the secretariat's inbox, which Myles is in charge of checking. He opens the email and clicks **Edit** to switch to edit mode. If the sender is unknown, F2 will suggest creating the sender as a participant in the participant register via the dialogue "Create participants in the participant register". Myles clicks **Create participants**.

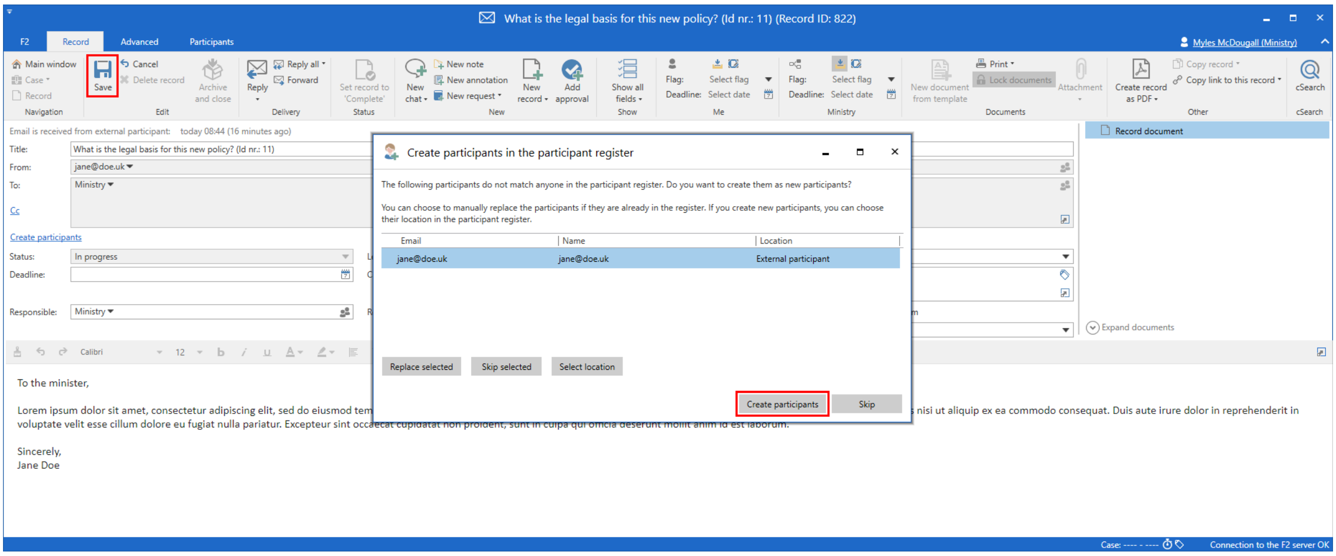


Figure 1. Email inquiry from a citizen

Next step is attaching the email to a new case. Myles enters a "+" in the "Case" field on the record and presses **Enter**. The "New case" dialogue opens. He selects the most relevant available case template, "Citizen's inquiries", which automatically adds the sender of the email to the "Case participants" field. Myles fills in the remaining template fields and clicks **OK** to create the new case.

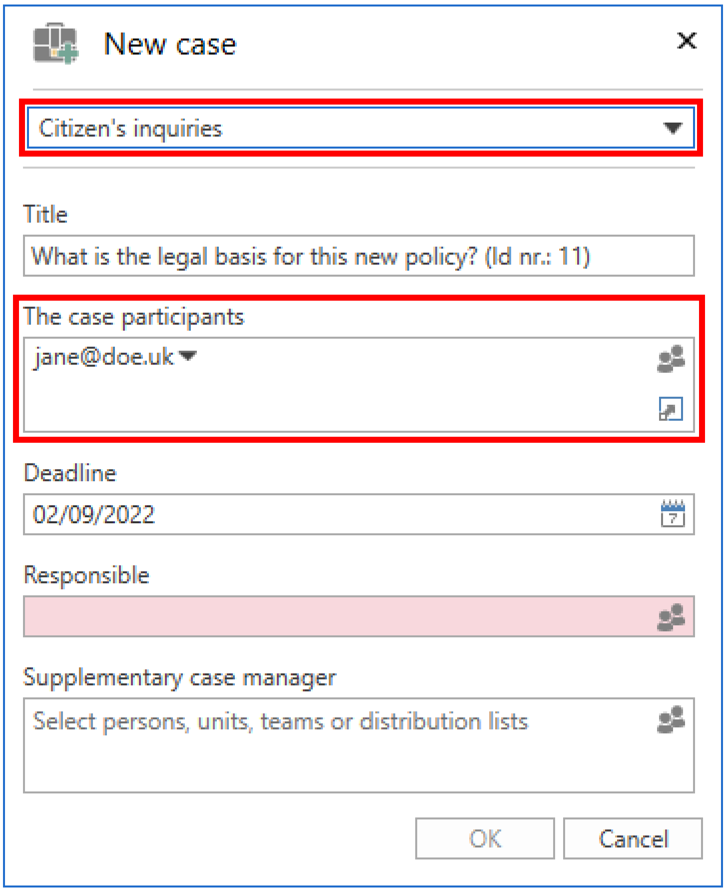


Figure 2. The "New case" dialogue

Myles saves the record. The record is now on the case, and the citizen is added as a case participant.

2. The task of replying is assigned using a request

Myles has to hand over the task of replying to the inquiry to an appropriate colleague or unit. He creates a new request on the email by clicking **New request**. The “New request” dialogue opens, and Myles adds his colleague, Penelope Poole, to the “Recipient” field. He also had the option of adding her unit, “Politics”, or a different colleague. Myles fills in the remaining fields of the request and clicks **Send** to send it to Penelope.

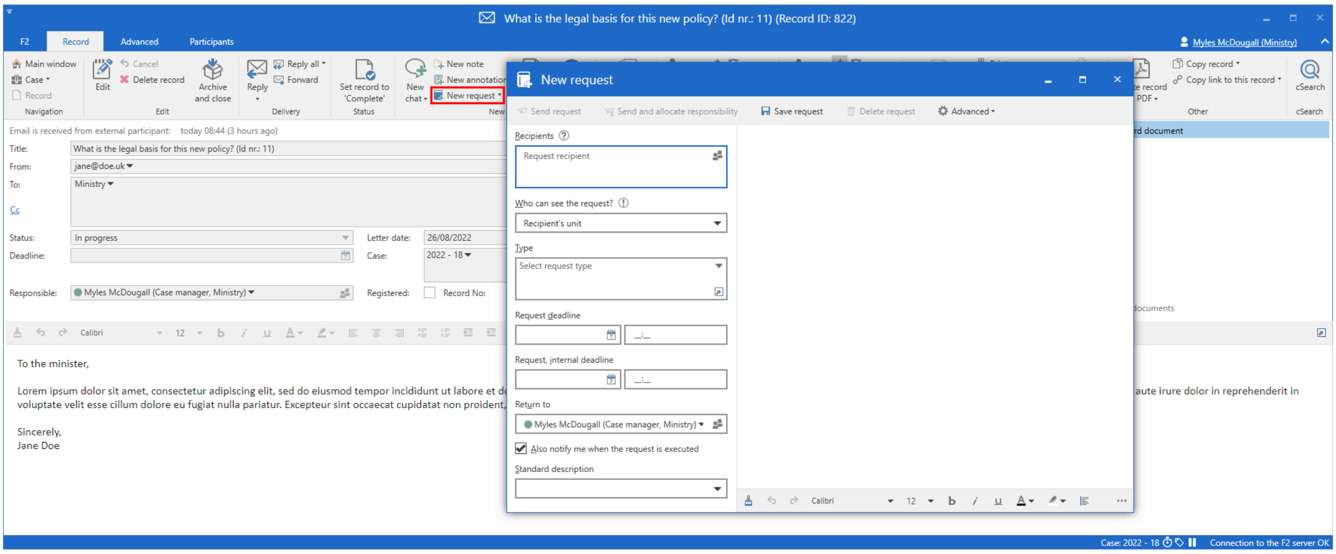


Figure 3. Create request based on email

Read more about creating and sending requests.

3. The request is accepted and an answer record created

Penelope receives the request record in her inbox. From here she can view both the original inquiry and Myles' request. Penelope opens the record, and the request window automatically opens. She accepts the request and then clicks **Create answer record.**

Read more about receiving and accepting requests.

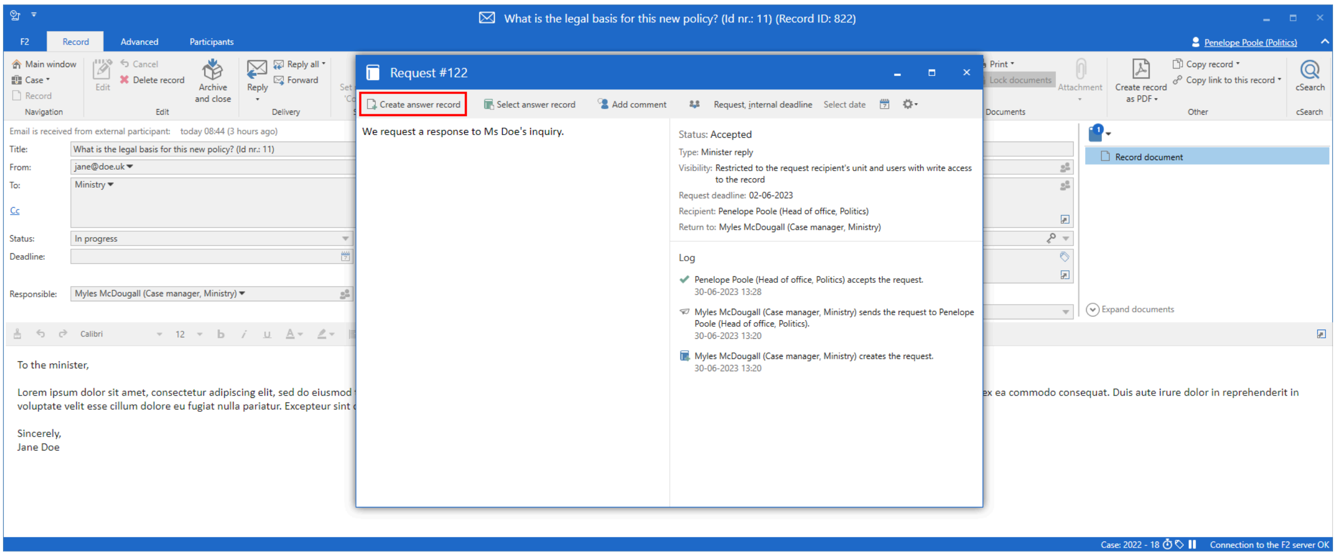


Figure 4. Create answer record as reply to request

In the "Choose answer type" dialogue, Penelope clicks **Approval** to create an answer record with an approval flow.

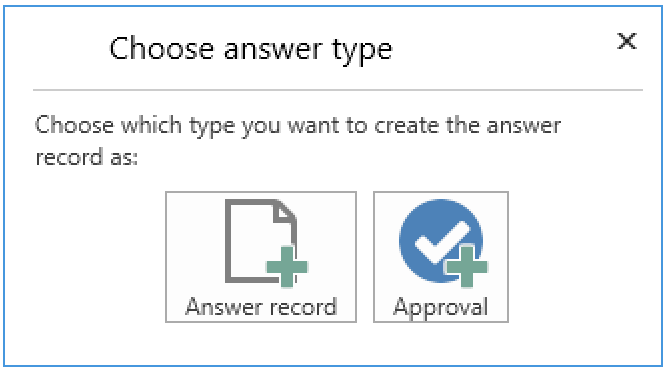


Figure 5. Select type of answer record

The "New record" dialogue opens. Penelope selects the relevant approval template from the "Approval template" drop-down menu. Other fields in the dialogue have been automatically filled in by F2 based on information from the request. Penelope clicks **OK** to create the record with the selected approval flow.

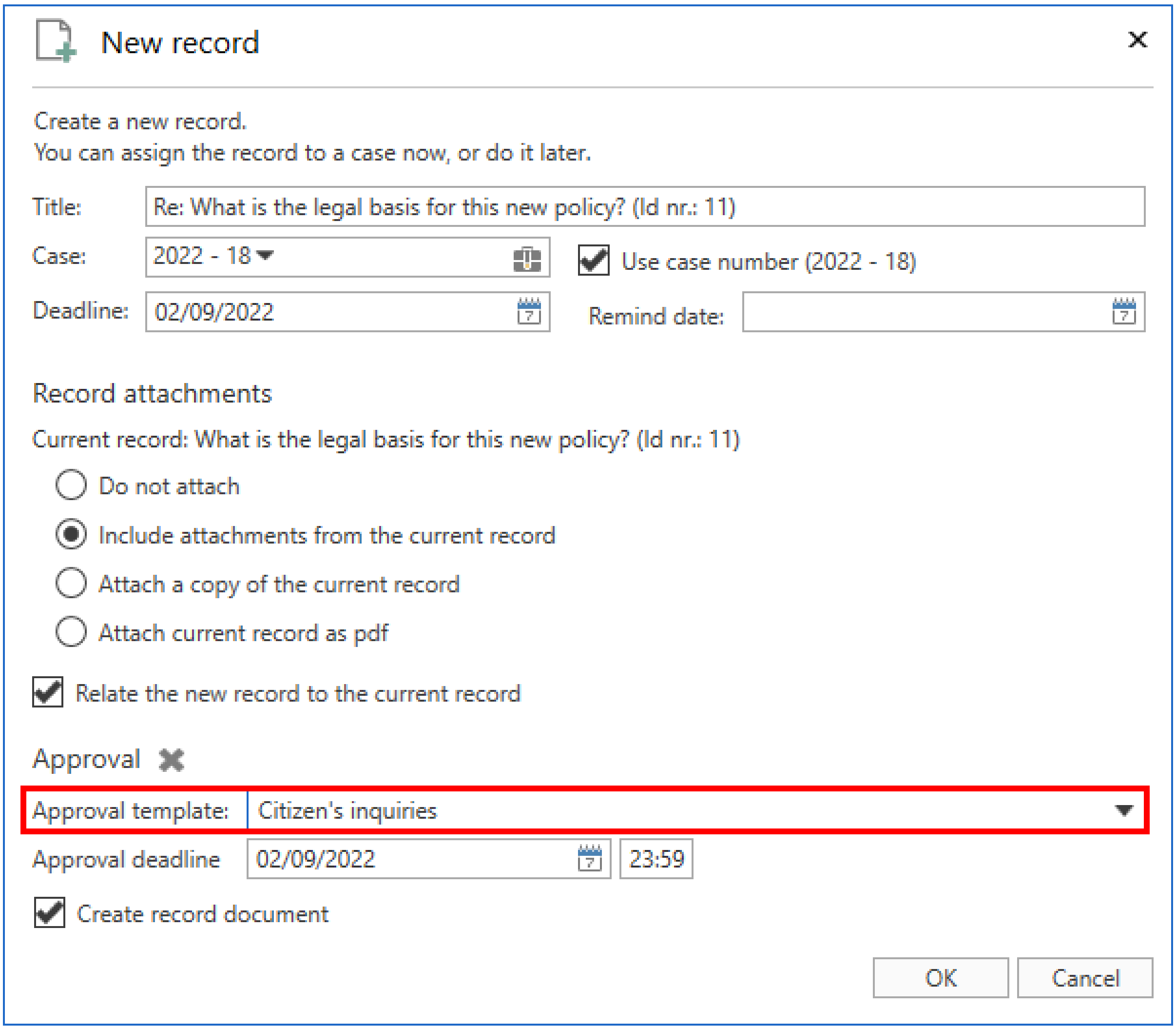


Figure 6. The "New record" dialogue with an approval template selected

F2 creates the answer record and its approval flow.

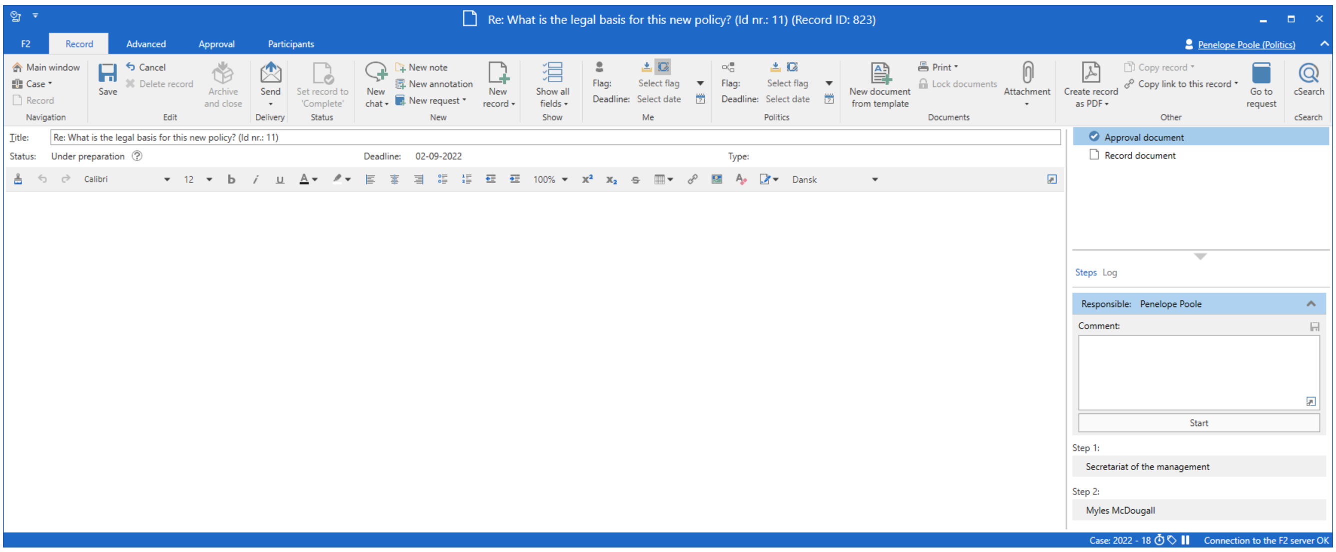


Figure 7. Answer record with the approval template applied

The box "Create reply when approval is final" is ticked in the approval template. This ensures that F2 automatically creates a record containing the reply once the reply has been finally approved.

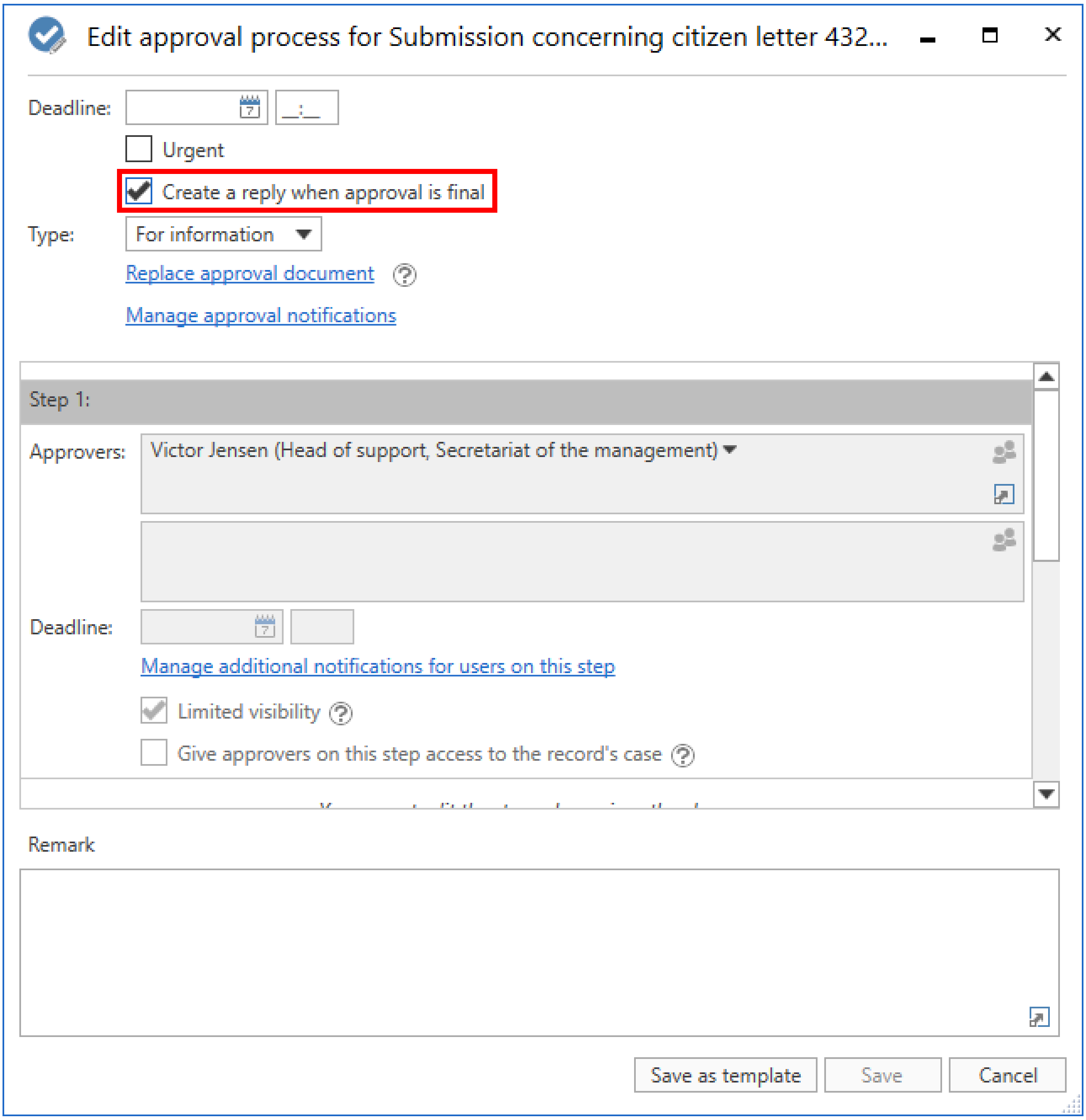
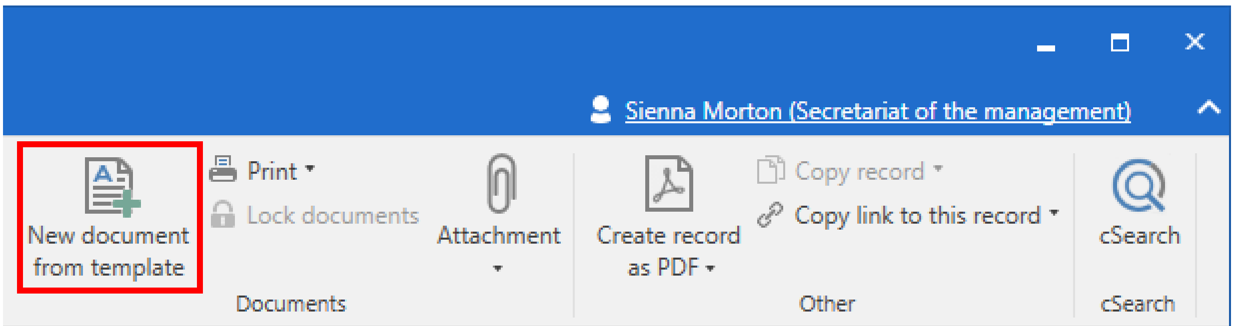


Figure 8. The "Edit approval process" dialogue

4. A reply is written based on a document template

Penelope wants to attach a document template to the approval record. She clicks **New document from templates** in the record ribbon to use a template for inquiry replies.



Penelope selects the relevant template in the “New document” dialogue and clicks **OK**.

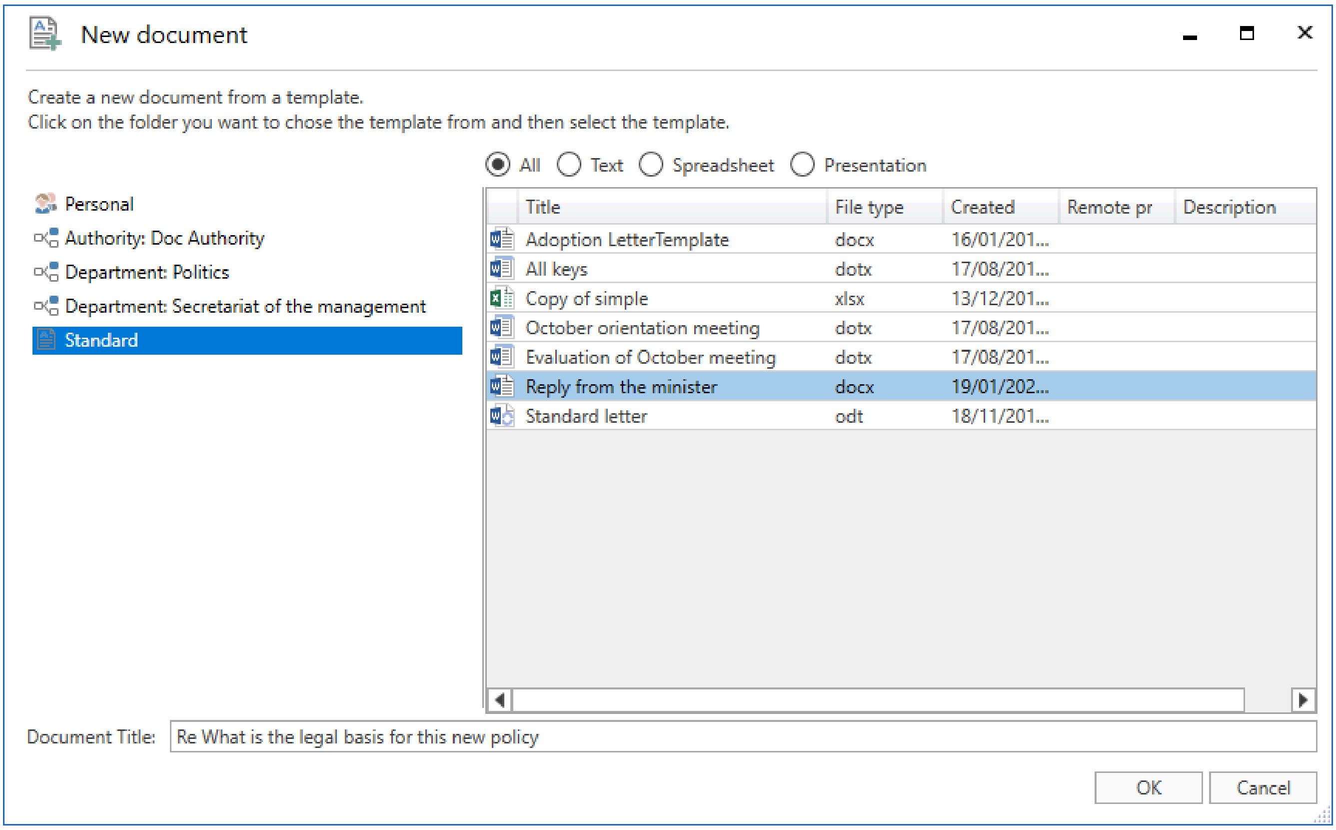
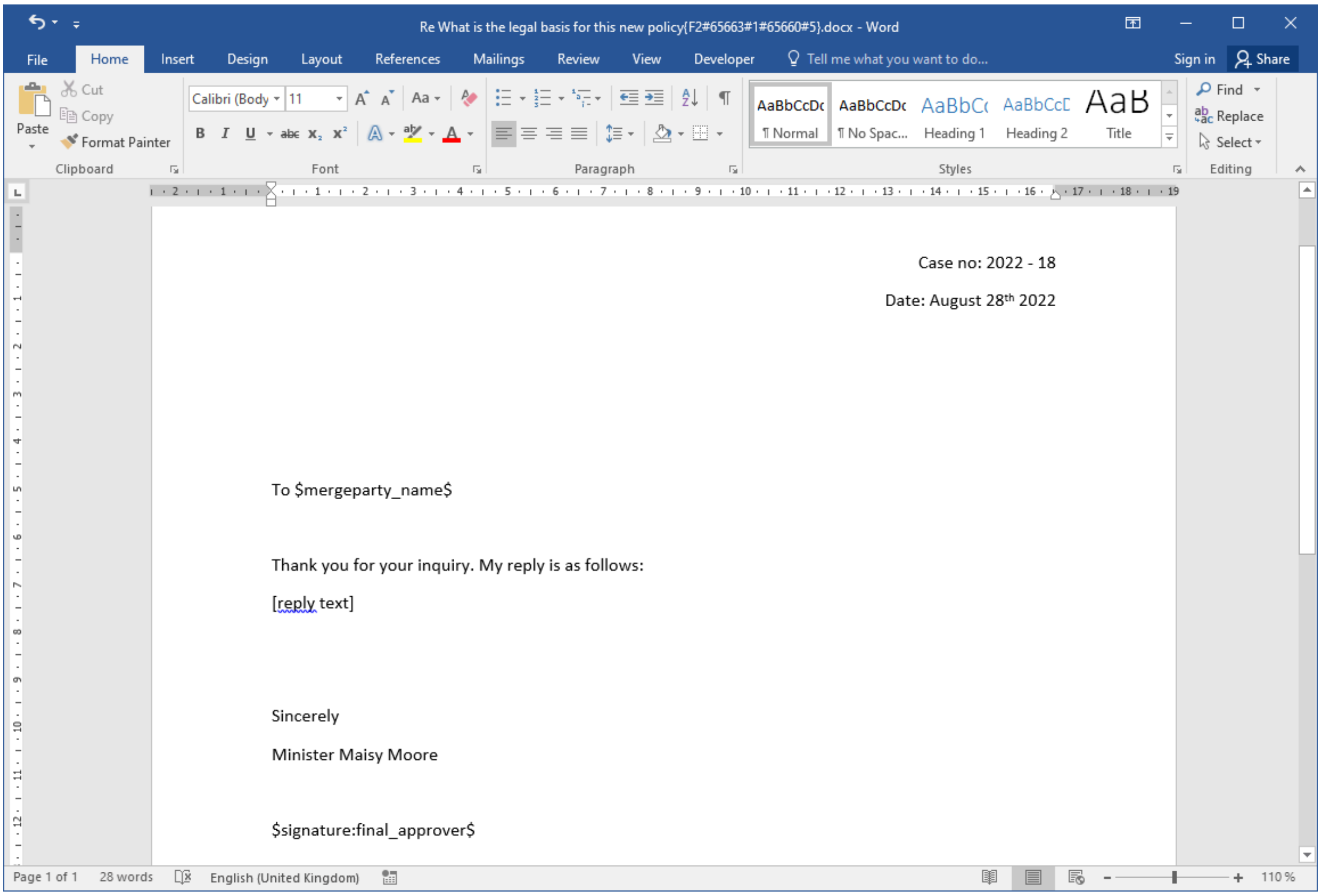


Figure 10. Choose a document template

The document template contains relevant merge codes and phrases including a signature phrase. Penelope writes the reply to the inquiry in the document.



Additionally, the document template is set up to be attached to records created automatically upon final approvals. This setup is done by ticking the box "Include upon reply creation when approval is final" in the document's properties.

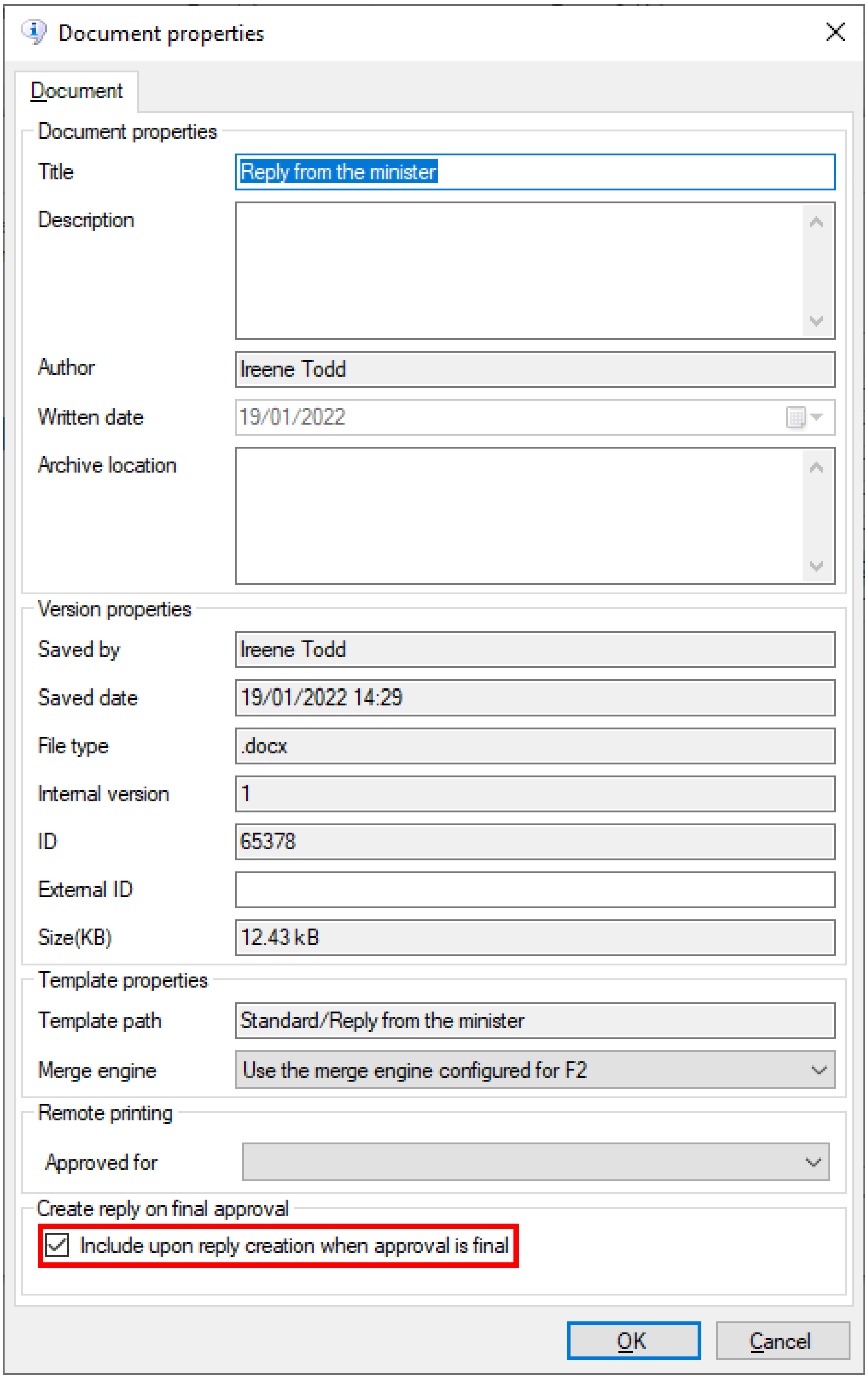


Figure 12. Document properties

5. An approval flow is started for the reply

Once Penelope has completed the reply to the inquiry and saved the document on the record, she can start the approval flow. She clicks **Start** in the right side of the record window, and the approval is sent to the first approver.

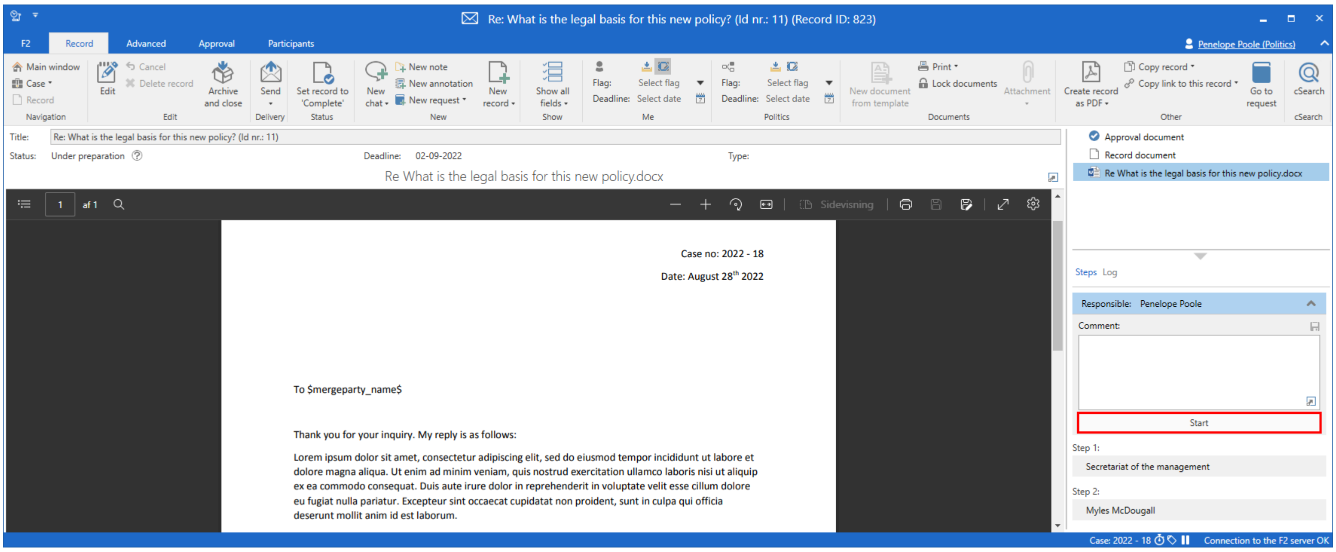


Figure 13. Start approval process from the record window

6. The reply is approved

The approval passes through the steps of the approval flow until the final approver clicks **Final approval**. Penelope then receives the approval record and the automatically created record in her inbox.

F2 has automatically:

- … created a record with a copy of the approved document attached. The signature phrase and any other information have been merged into the document.
- … added the citizen as a recipient in the "To" field on the newly created record, readying it for sending.

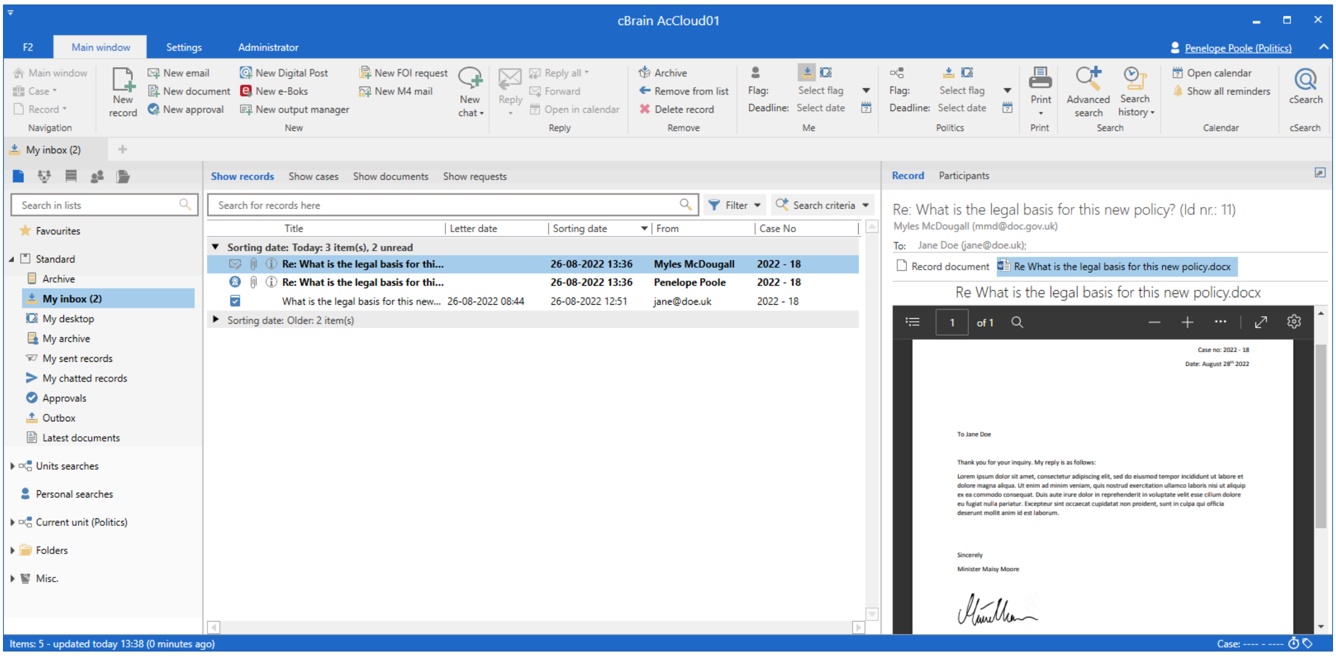


Figure 14. The approval and reply records placed in the inbox upon final approval

7. The answer record is sent

Penelope opens the automatically created record to send as a reply to the citizen. The signature phrase and other merge fields have been merged with the document. The citizen has been added as a recipient in the “To” field of the record. Penelope adds the relevant unit in the authority as the sender in the “From” field.

Penelope has the option of the writing a message in the record document before sending. She can also select the format of the attached document, i.e. whether to send a Word or PDF document (requires the F2 Metadata Remover add-on - documentation available in Danish).

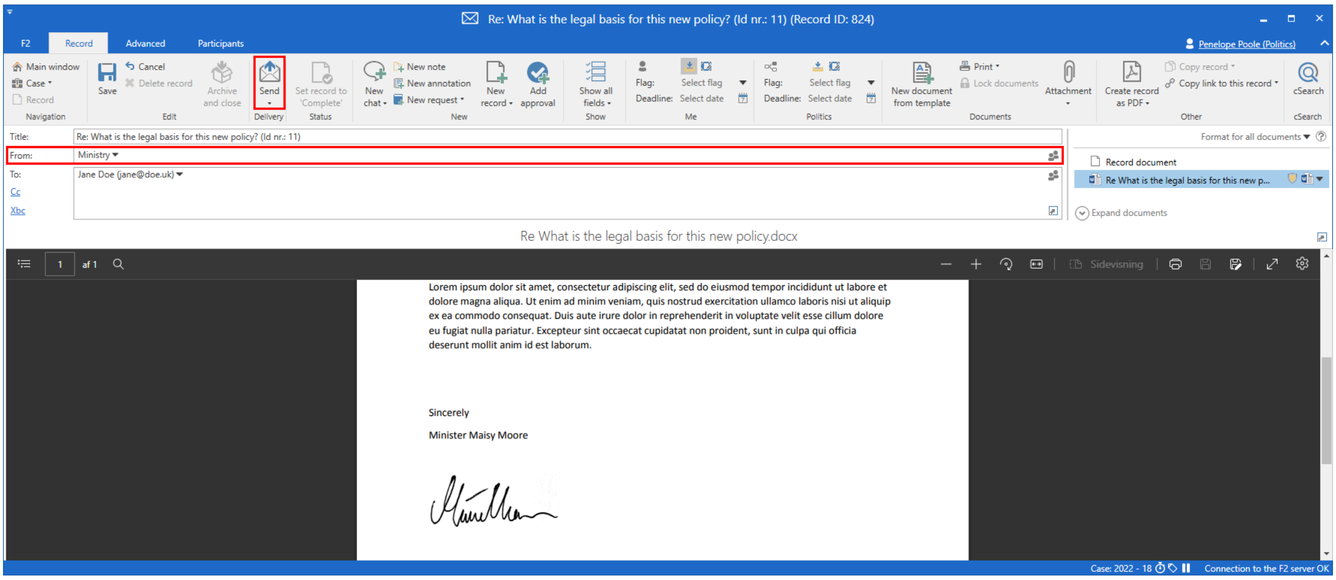


Figure 15. Send reply to inquiry

Penelope clicks **Send** to send the record to the citizen.

8. The request is finalised

When the request is executed, the record on which Myles created the request is returned to his inbox. In the request window, he finds the link (1) to the answer record with an approval flow where he can read the reply. Myles finalises the request (2).

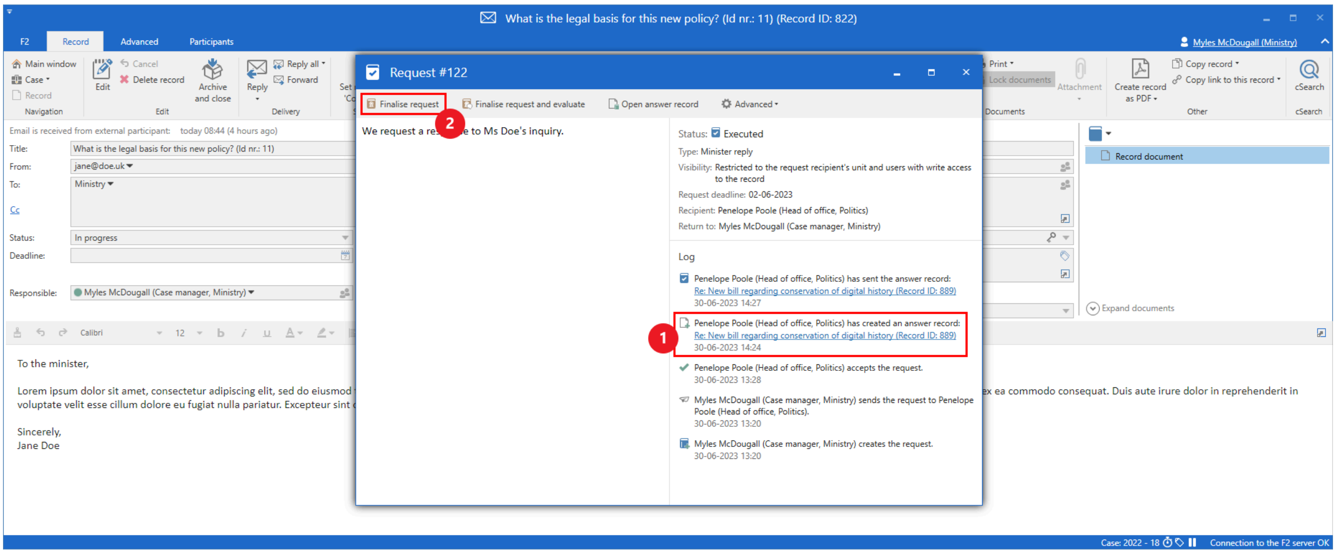


Figure 16. Finalise the request

Set up signed approvals

F2 Signed Approval has three fundamental functionalities:

- Signature phrases, which are managed through phrase administration.
- Automatic attachment of signed documents upon record approval, which is managed through document templates. Read more in Document templates.
- Automatic record creation upon record approval, which is managed through approval flow setup. Read more in Approval process.

These functionalities support a vast range of processes involving signed approvals. These processes can also involve case participants and case templates as described in the Case participants and templates section.

The following sections describe the setup and use of the presented functionalities.

Signature phrases

Signature phrases are merged into document templates along with any other phrases and merge codes. The signature phrase syntax is as follows: The code begins and ends with a “$” and must contain the word “signature” followed by the name of the relevant signature phrase. Separate the two elements of the code with a colon.

Signature phrases in document templates must thus follow this format:

- $signature:final_approver$

Create new signature phrase

Signature phrases are created and managed in the “Phrase administration” window, which opens from the “Settings” tab. Managing phrases requires the “Phrase administrator” privilege.

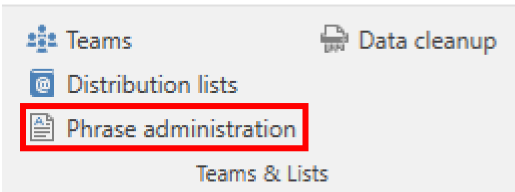


Figure 17. Open “Phrase administration”

Create a Word document containing the actual signature and save it locally. Then, in F2 click **New phrase** in the “Phrase administration” window to create a new phrase.

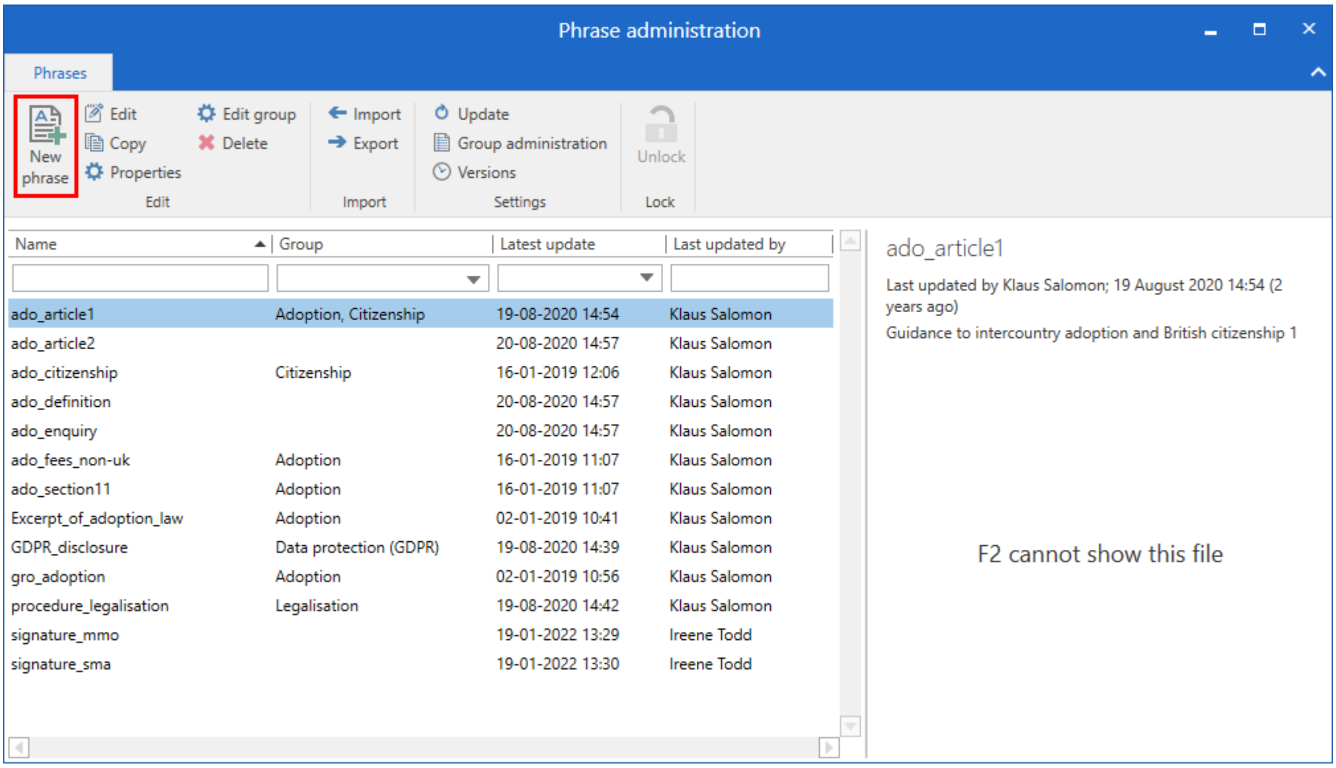


Figure 18. New signature phrase

In the “Create new phrase” dialogue, name the phrase. Add a description if relevant and assign the phrase to a group using the “Group” drop-down menu. Then click **Select document** to import the Word document with the phrase to F2.

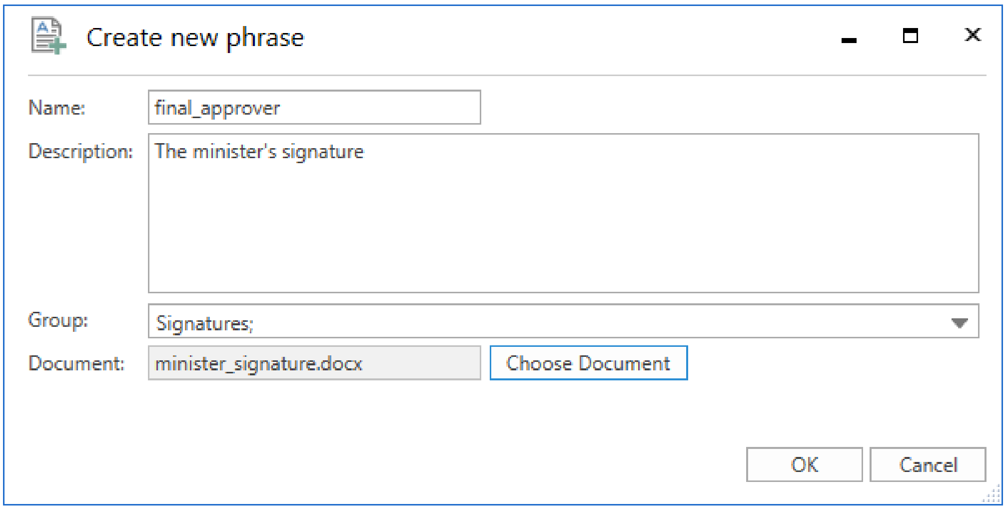


Figure 19. The “Create new phrase” dialogue

Click **OK** to create the signature phrase.

To make it easier to find phrases containing signatures, create a new group named “Signature”.

Read more about creating and editing phrases and phrase groups (available in Danish).

NOTE	It is important to create the signature phrase before attempting to merge it with a document template, otherwise the phrase code will be replaced by an error message.

Manage signature phrase variants

Organisations can use phrase variants to handle merging of signature phrases for multiple users. A phrase can have multiple variants. If the criterion for a specific variant is met, the variant will replace the default phrase when merging. The criterion for merging a variant is that said variant matches the username of the relevant approver.

Phrase variants are created using the same process as regular phrases, but their names are important. F2 can only recognise a phrase variant when it follows a specific syntax: [name of the default phrase]%[username].

For instance, a default phrase named “final_approver” can have a variant for the user Maisy Moore, whose username is “mmo”. The phrase variant must then be named “final_approver%mmo” when created in the “Phrase administration” dialogue.

Use the name of the default phrase when setting up the document template - in this instance, $signature:final_approver$. F2 will evaluate all variations of the phrase relative to the specific approver’s username and merge the associated variant.

NOTE	If an approver does not have an associated phrase variant, the default phrase is used. Keep this in mind when setting up the default phrase, e.g. by using the organisation’s logo for this phrase.

Apply signature manually

It is possible to merge signature phrases outside of approval processes. Switch to edit mode on the record, right-click on the relevant document and select **Insert my signature** in the context menu. The signature phrase is then merged into the document.

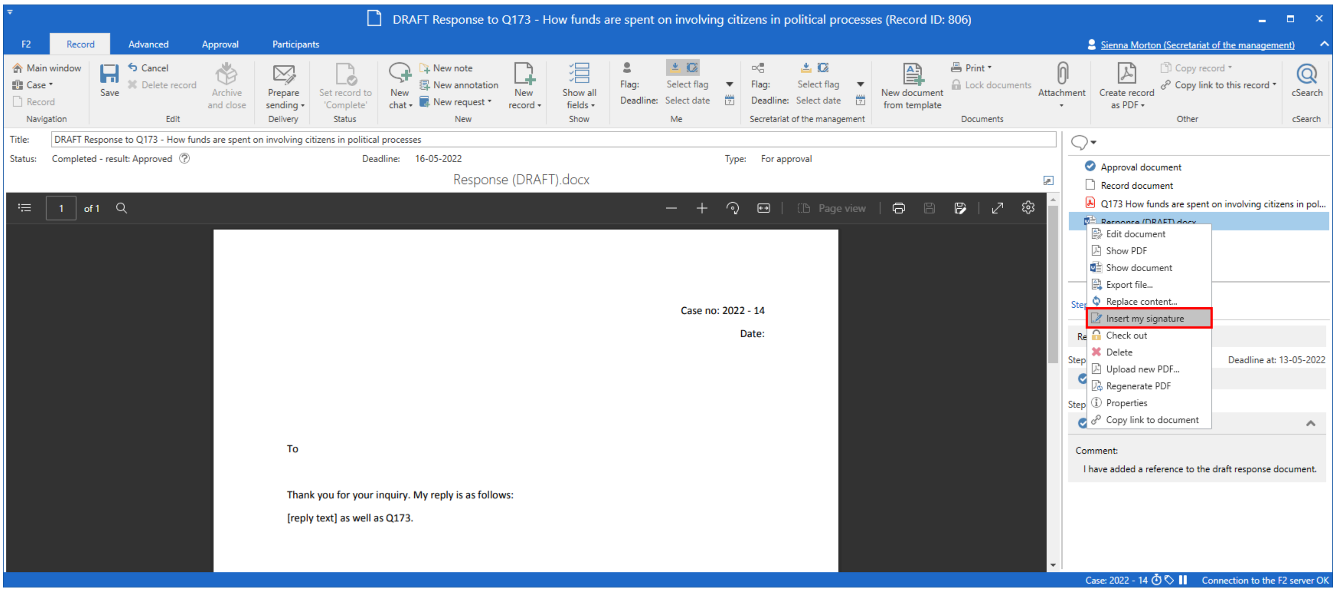


Figure 20. Merge signature phrase manually

The user applies their personal phrase variant, if they have one, when clicking **Insert my signature**. If the user has no associated phrase variant, or if no phrase variants exist, the default phrase is merged.

The manual merging option can be disabled through a configuration. Configurations are made in cooperation with cBrain.

Document templates

You can set up documents so they are automatically attached to the records F2 creates upon final approval. . In the document area of the record window, open the properties of the relevant document via its context menu. Check the box "Include upon reply creation when approval is final".

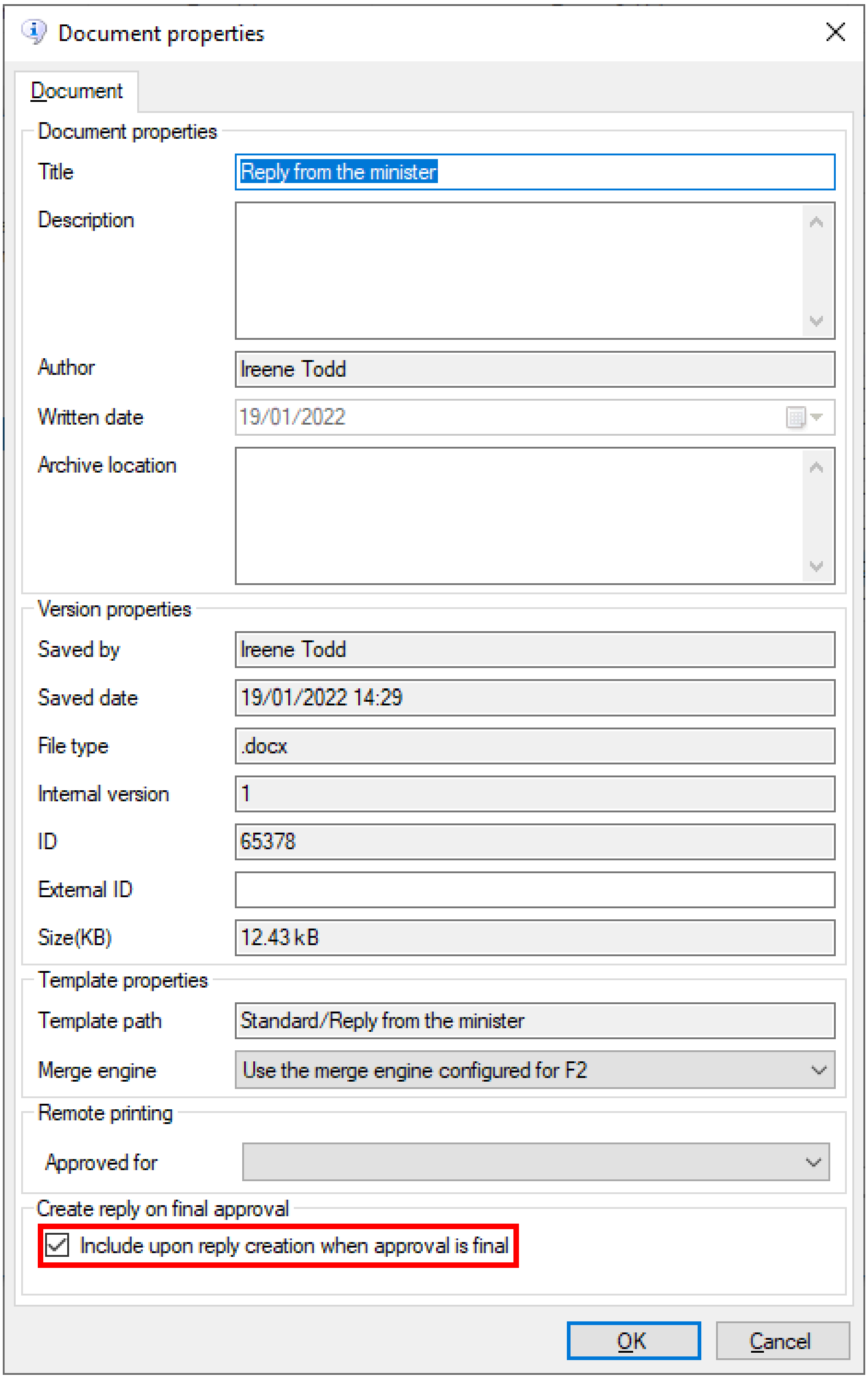
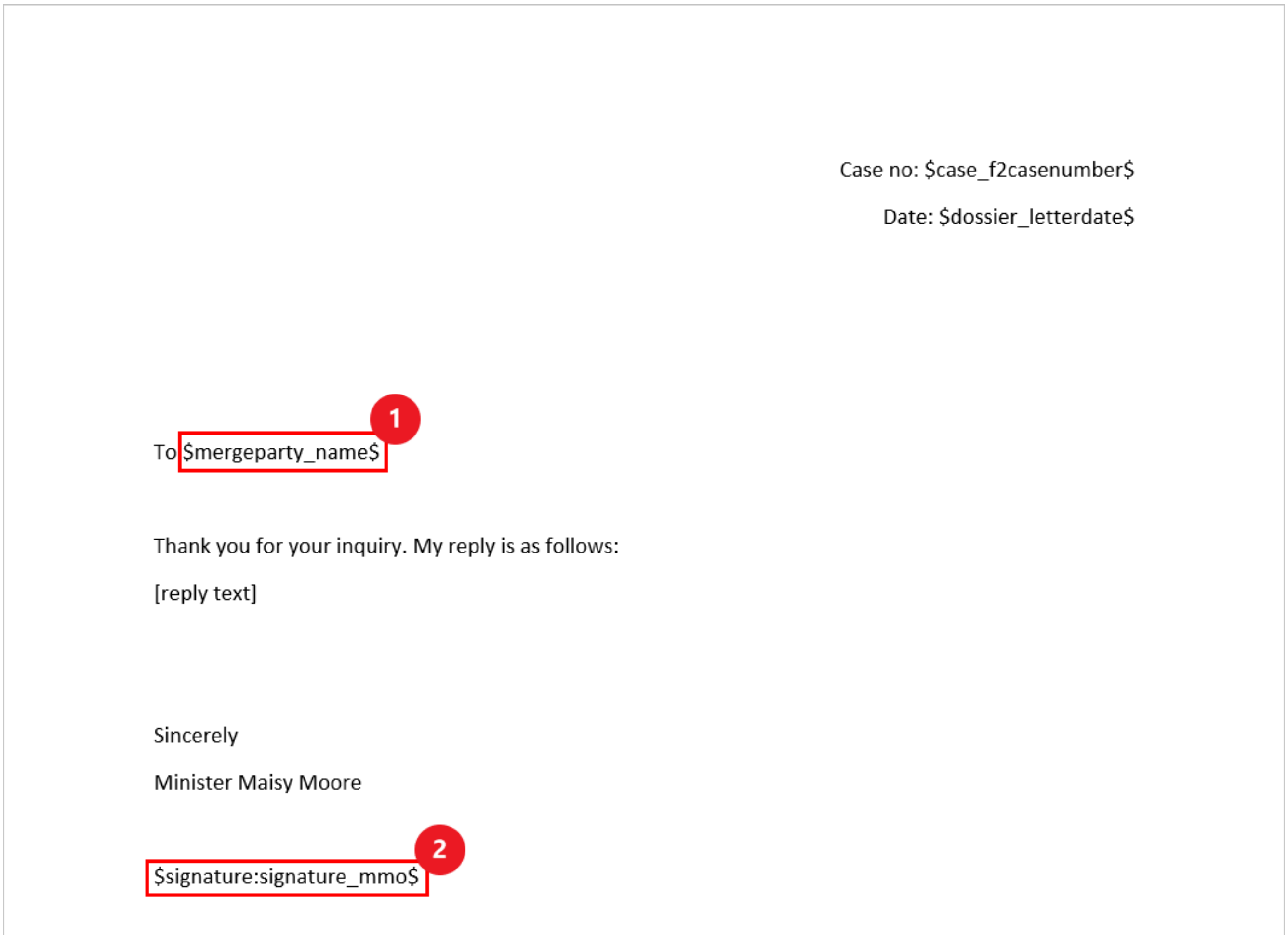


Figure 21. Document properties

Set up document template

All users can create personal document templates for their daily work. Furthermore, users with the “Template administrator” privilege can create templates available as standard documents for the entire organisation or specific authorities or units.

Create a Word document outside F2. Add merge codes and phrases, including the relevant signature phrase. Remember to use the proper signature phrase syntax, i.e. $signature:final_approver$.


Case no: $case_f2casenumber$

Date: $dossier_letterdate$

1

To $mergeparty_name$

Thank you for your inquiry. My reply is as follows:

[reply text]

Sincerely

Minister Maisy Moore

2

$signature:signature_mmo$

Figure 22. Example of a document template with merge codes (1) and a signature phrase (2)

Next step is importing the document template into F2. Click **Document templates** in the “Settings” tab to open the “Templates” dialogue.

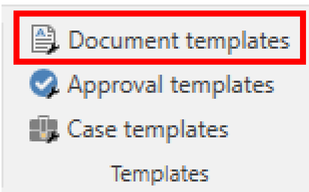


Figure 23. The “Document templates” menu item on the “Settings” tab

In the “Templates” dialogue, right-click the folder or unit in which you wish to place the template. Select **New template** in the context menu.

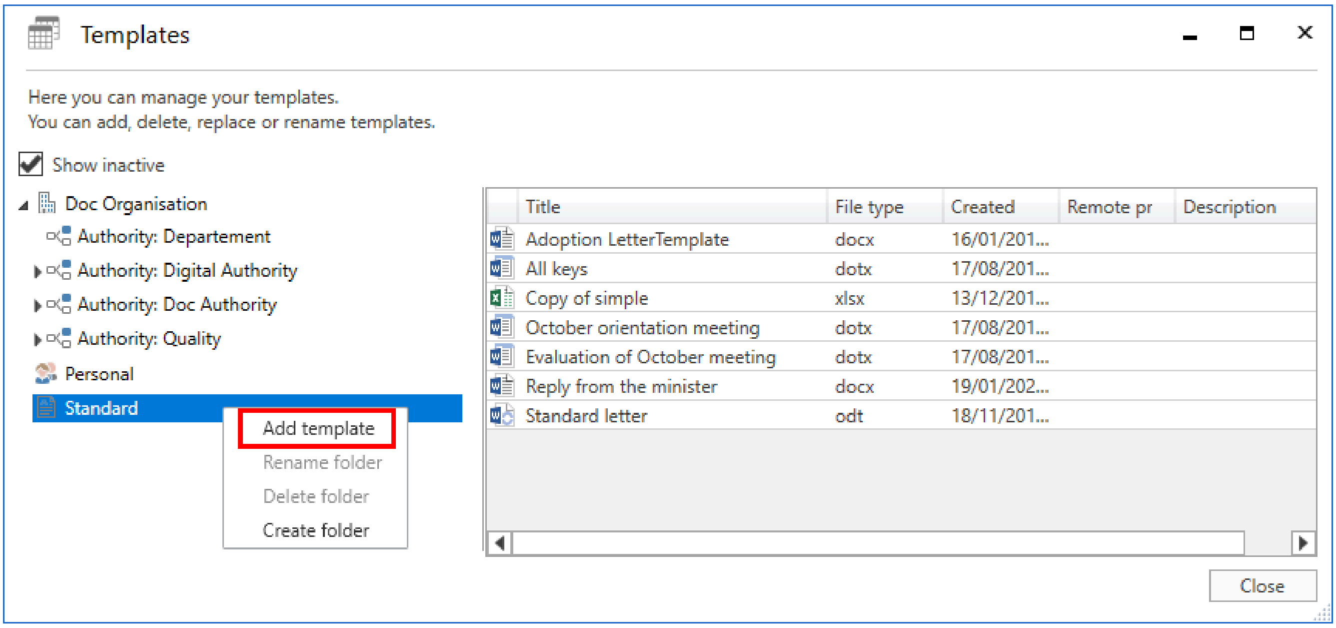


Figure 24. Create a new template from the "Templates" dialogue

In the "New template" dialogue, click **Browse...** to import the document template located outside F2.

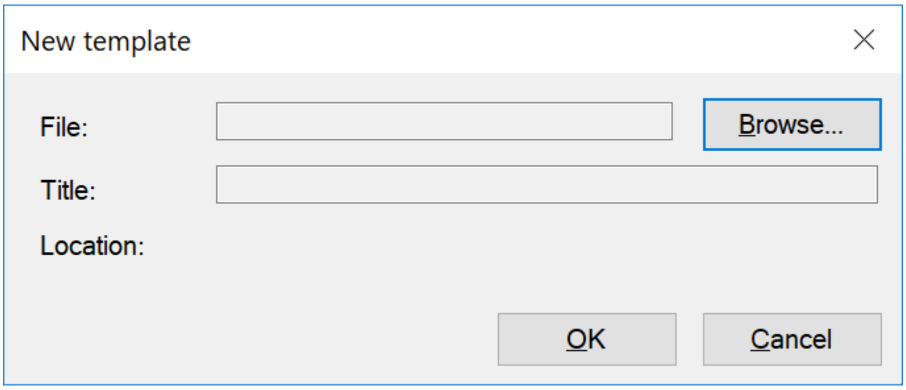


Figure 25. Create a new template

Give the template a title and click **OK**.

The next step is to ensure that the document template will be attached to the record automatically created by F2 upon final approval. . This is set up by checking a box in the document properties. Right-click the relevant template and select **Properties**.

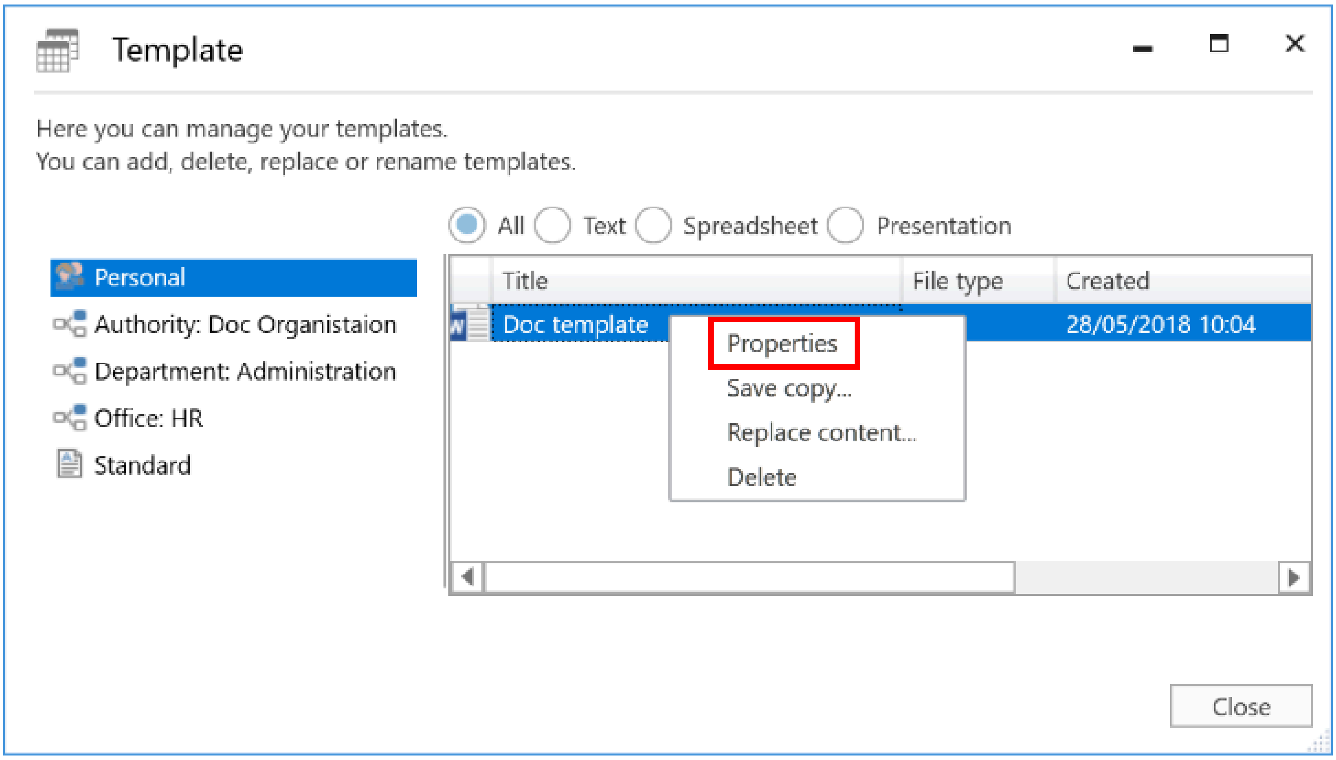


Figure 26. Open document properties from the “Templates” dialogue

The “Document properties” dialogue opens. Check the box “Include upon reply creation when approval is final” and click **OK**.

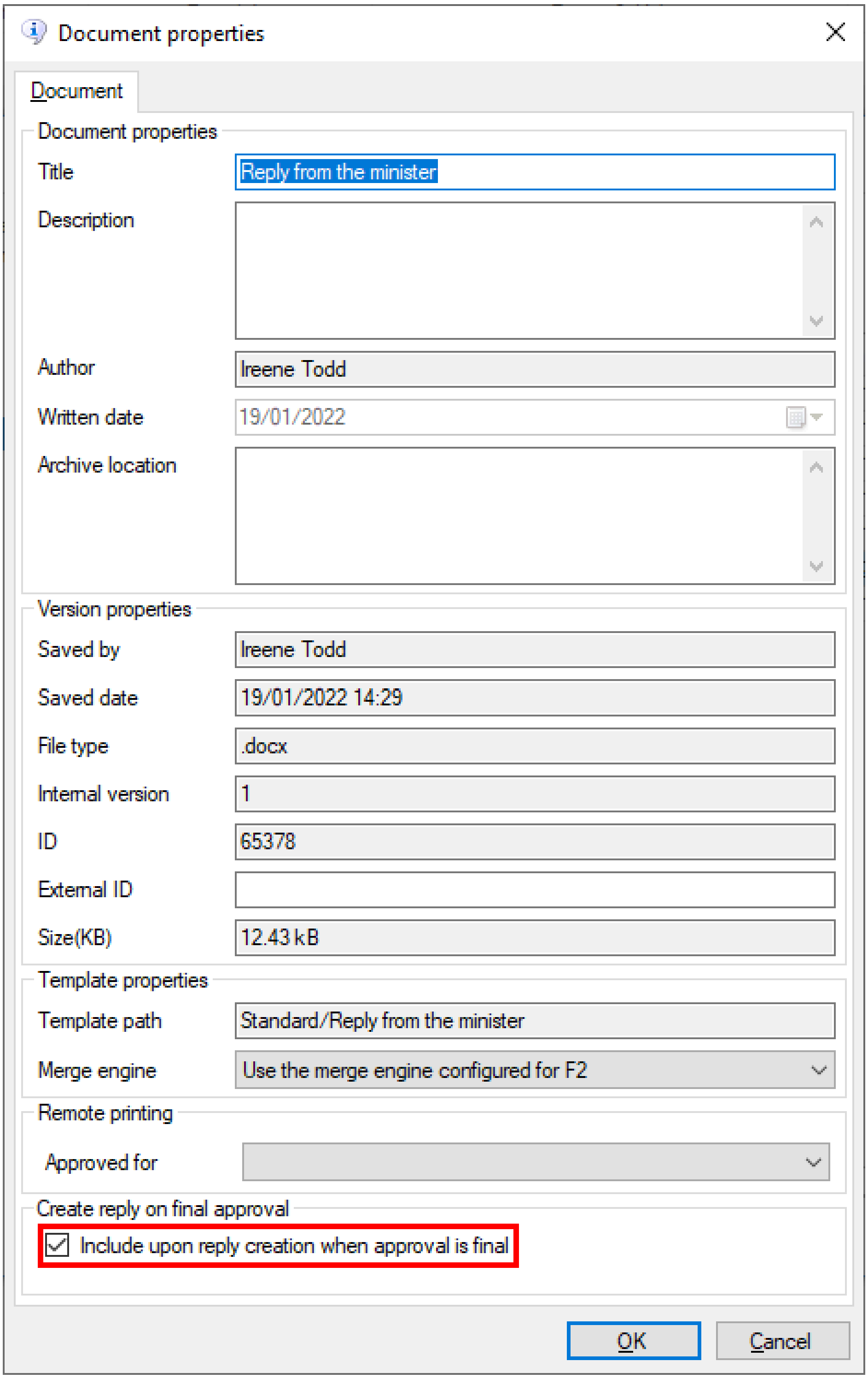


Figure 27. Document properties

Read more about document template creation and editing.

Approval process

The final approval in an approval process can trigger the creation of a new record with copies of the original approval record's attachments to which any signature phrases within the attachments are merged. The trigger is the checkbox "Create a reply when approval is final" in the "New approval" and "Edit approval" dialogues. Check the box at any time from creation until the final approval.

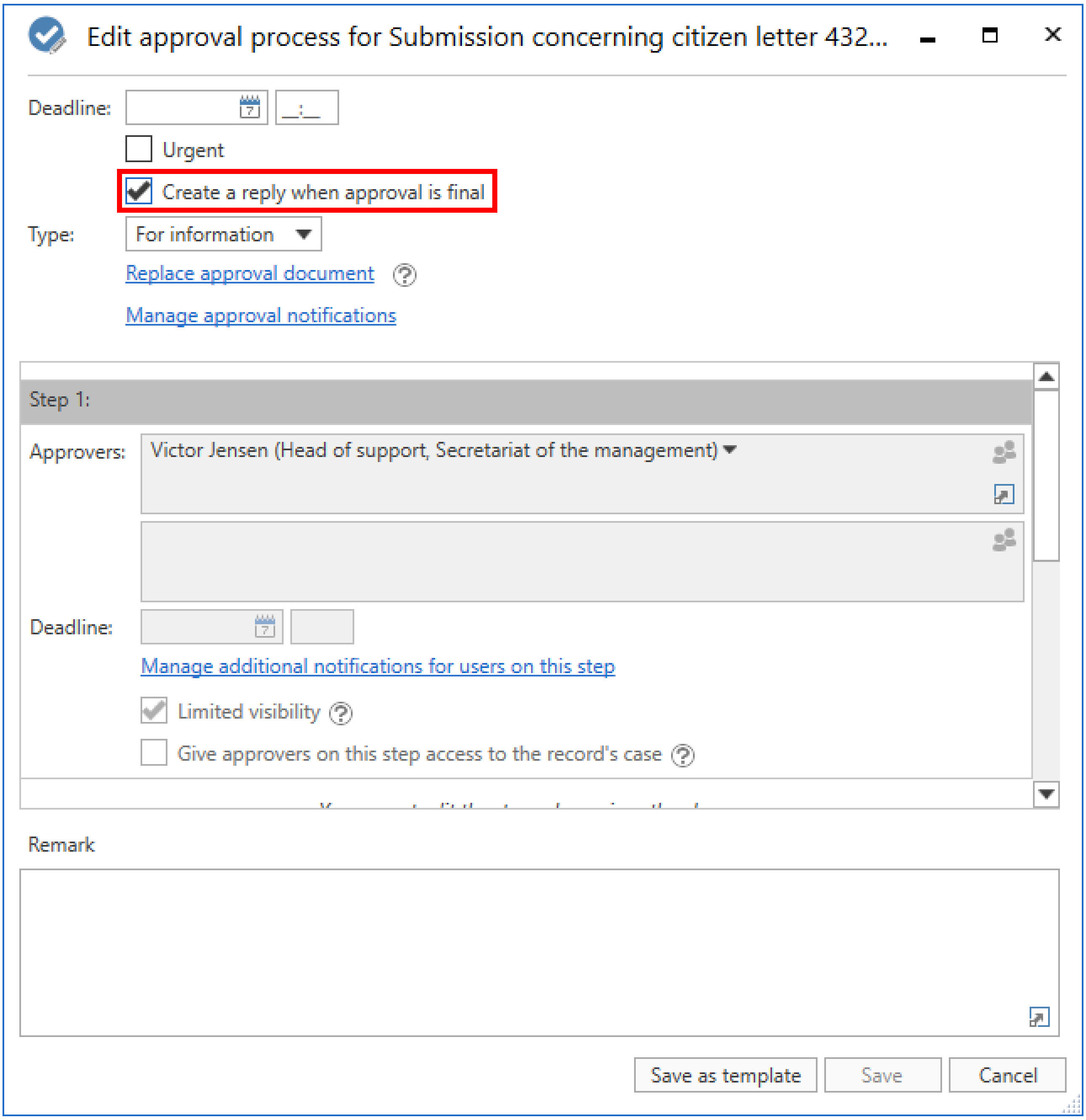


Figure 28. Set up reply creation while editing an approval

Read more about setting up approval processes.

F2 can be configured to automatically merge signature phrases upon final approval. Configurations are made in cooperation with cBrain.

Set up approval template

Regularly used approval processes can be saved as approval templates.

Two types of templates exist:

- Personal approval templates: Templates created by individual users that are only visible and usable by them.

- Shared approval templates: Templates available to select units or the entire organisation. These are created by users with the “Template administrator” privilege, who also decide who can view and use the templates.

Open the “Approval templates” dialogue from the “Settings” tap to create new shared approval templates.

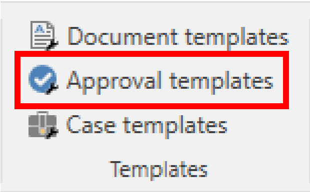


Figure 29. The “Approval templates” menu item on the

Click **New approval template** in the “Approval templates” dialogue.

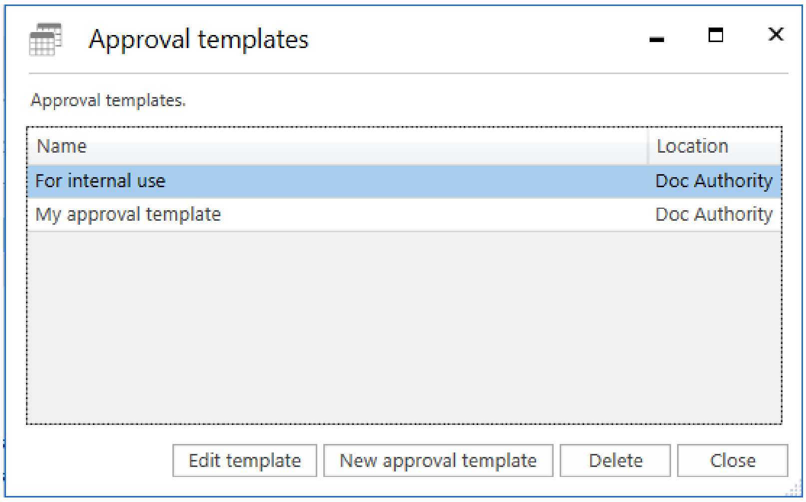


Figure 30. The “Approval templates” dialogue

Set up the steps (1) of the desired approval process in the “New approval template” dialogue. Next, the template must be set up to automatically trigger the creation of an answer record upon final approval. Check the “Create a reply when approval is final” box (2) to enable this function.

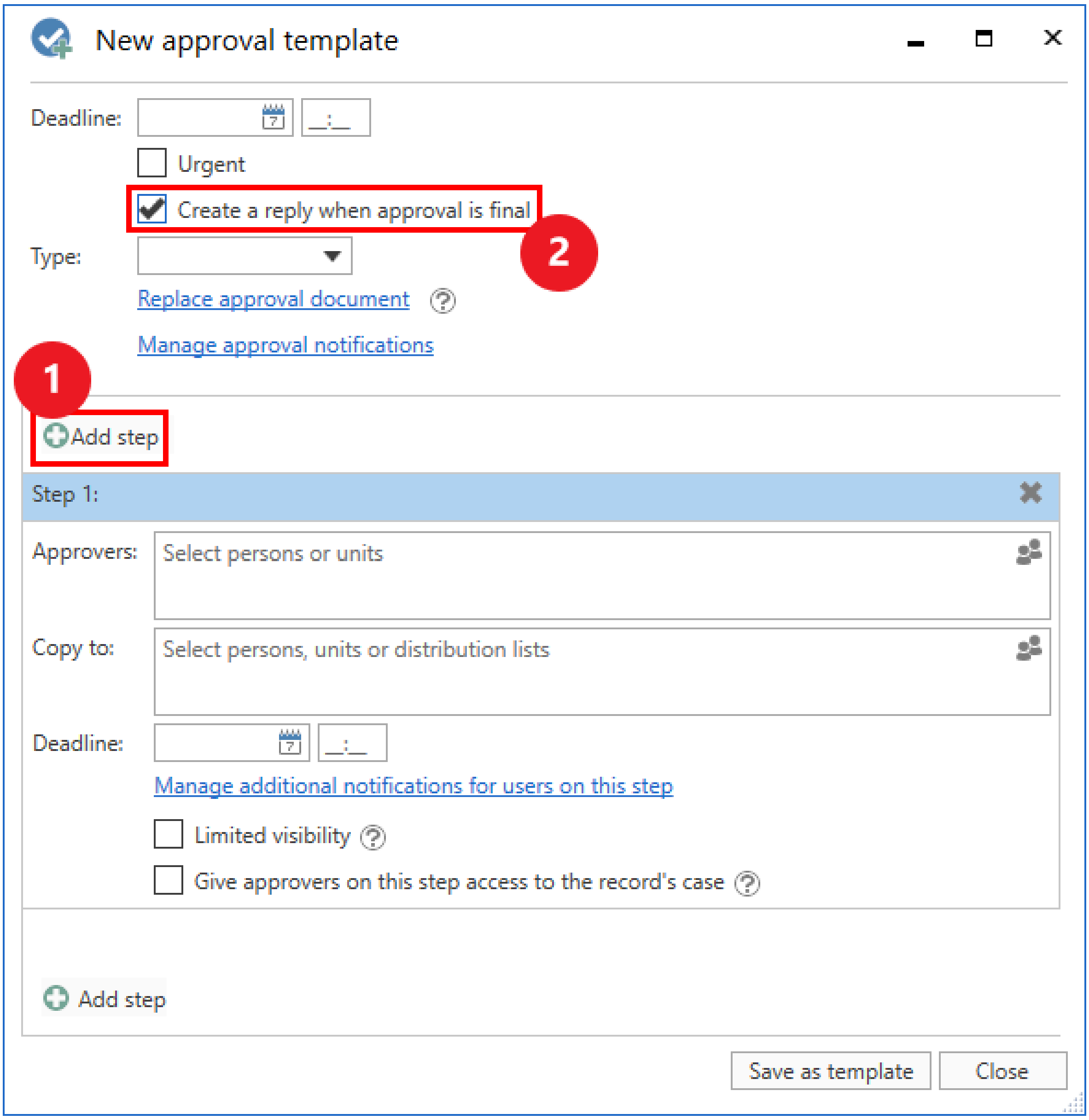


Figure 31. The "New approval template" dialogue

Click **Save as template**. The "Save as template" dialogue opens. Name the approval template. Check the "Template placement" box to make the template available to all users in the authority or a certain unit (select the authority or unit).

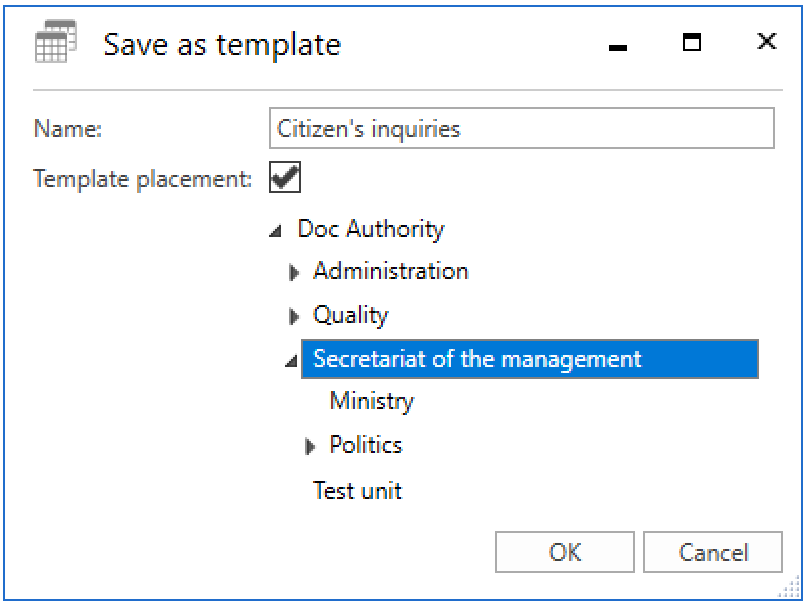


Figure 32. The "Save as template" dialogue

Click **OK** to save the approval template.

Read more about creating and editing approval templates.

Case participants and templates

If the approval record is on a case with a case participant, the case participant is added as a recipient to the record created upon final approval. If there are multiple case participants, a record is created for each. This also enables the use of merge codes for case participants in the relevant document template.

Once the case has been created, add participants to the "Case participants" metadata field.

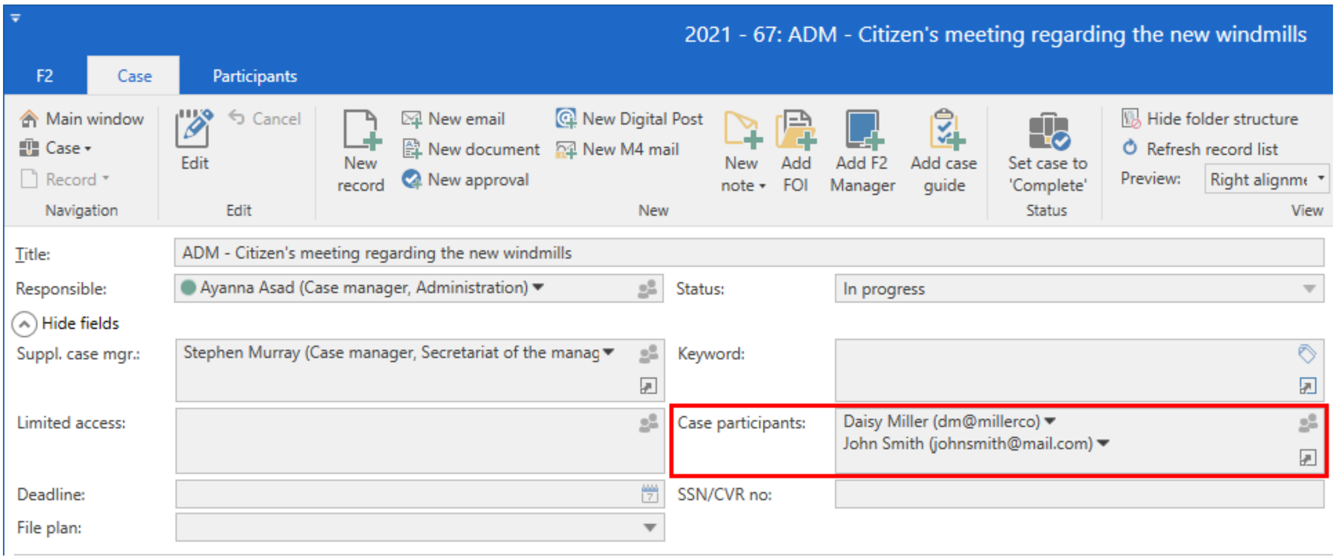


Figure 33. The "Case participants" field in the case window

Case participants can also be added during case creation by using a case template. If a selected case template includes the "Case participants" field, the field is added to the case creation dialogue and may be pre-filled or mandatory. F2 Case Templates is an add-on module.

Case templates can also be set up to automatically add the sender of an email as a case participant during case creation. This applies to cases created based on a received email, e.g. a request from a citizen.

Case participants can also be added manually in the "New case" dialogue, if a selected case template includes the "Case participants" field.

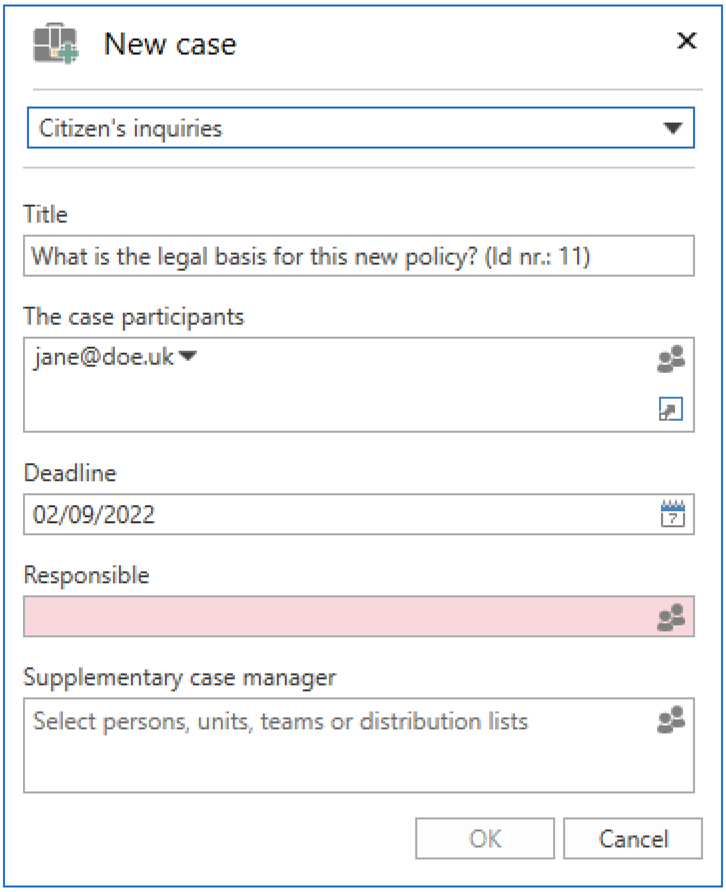


Figure 34. The "New case" dialogue

NOTE It is only possible to add case participants that already exist in F2's participant register.

Set up case template for received emails

Firstly, enable the "Case participants" field in the case template. The case template must utilise an installation reference of the "Sender" type. This type of reference can only be added to the "Case participants" field. Besides this setup, the case template may be set up according to the authority's needs.

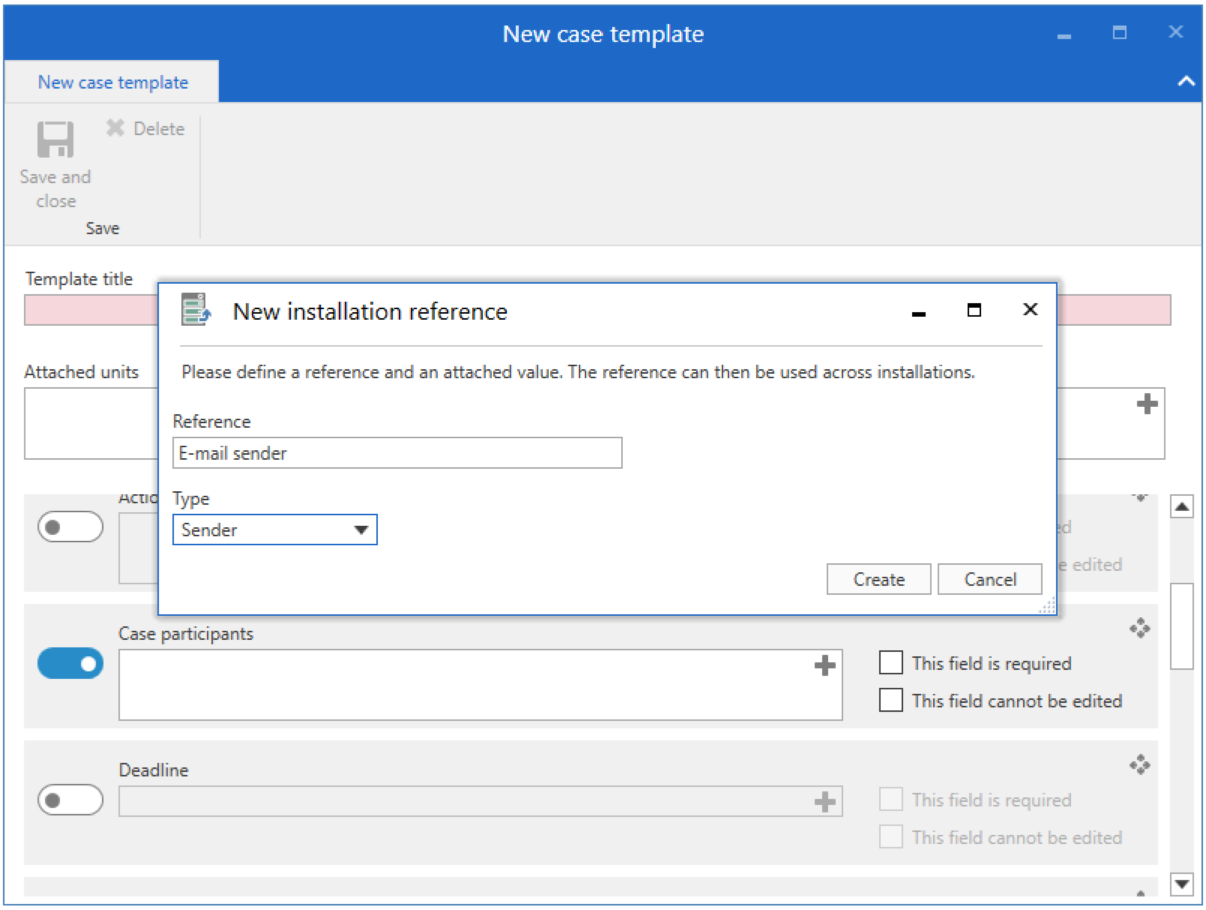


Figure 35. Creation of a new "Sender" installation reference

Read more about case template setup.