F2 Manager 2

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F2 Manager 2

IMPORTANT The content of this manual is updated to F2 version 11.1. If you are on a later version, you can read about the latest features and changes in our release notes. If you are using F2 Manager, you can read more here.

F2 Manager 2 provides you with both online and offline access to meeting materials, cases, and approvals on your iPad.

Meeting materials and cases are synchronised from F2 Desktop. Here you or someone like a ministerial secretary can synchronise material, making it available on F2 Manager 2.

Approvals are automatically synchronised with F2 Manager 2 when the approval reaches your step in the approval process.

NOTE If you are a gated approver, your gatekeeper will select which approvals are transferred to F2 Manager 2. Read more about the F2 Gateway Approvals add-on.

F2 Manager 2 options

The F2 Manager 2 app is divided into four sections where you have different options for working with meeting material, cases, and approvals:

Meetings: Access meeting materials and cases synchronised from F2 Desktop.

Approvals: Annotate documents and process approvals by returning or approving them.

Copy recipient: Read and process approvals where you are a copy recipient.

Chats: Chat on approvals and agenda items of meetings, and get a full overview of all your chats on F2 Manager 2.

Set up F2 Manager 2

F2 Manager 2 for iPad can be downloaded from Apple’s App Store on the device. The setup of the F2 Manager 2 app is done through the iPad’s **Settings**.

Setup through "Settings"

Once you have downloaded the F2 Manager 2 app, open **Settings** on the iPad and then select **F2 Manager 2** as shown below.

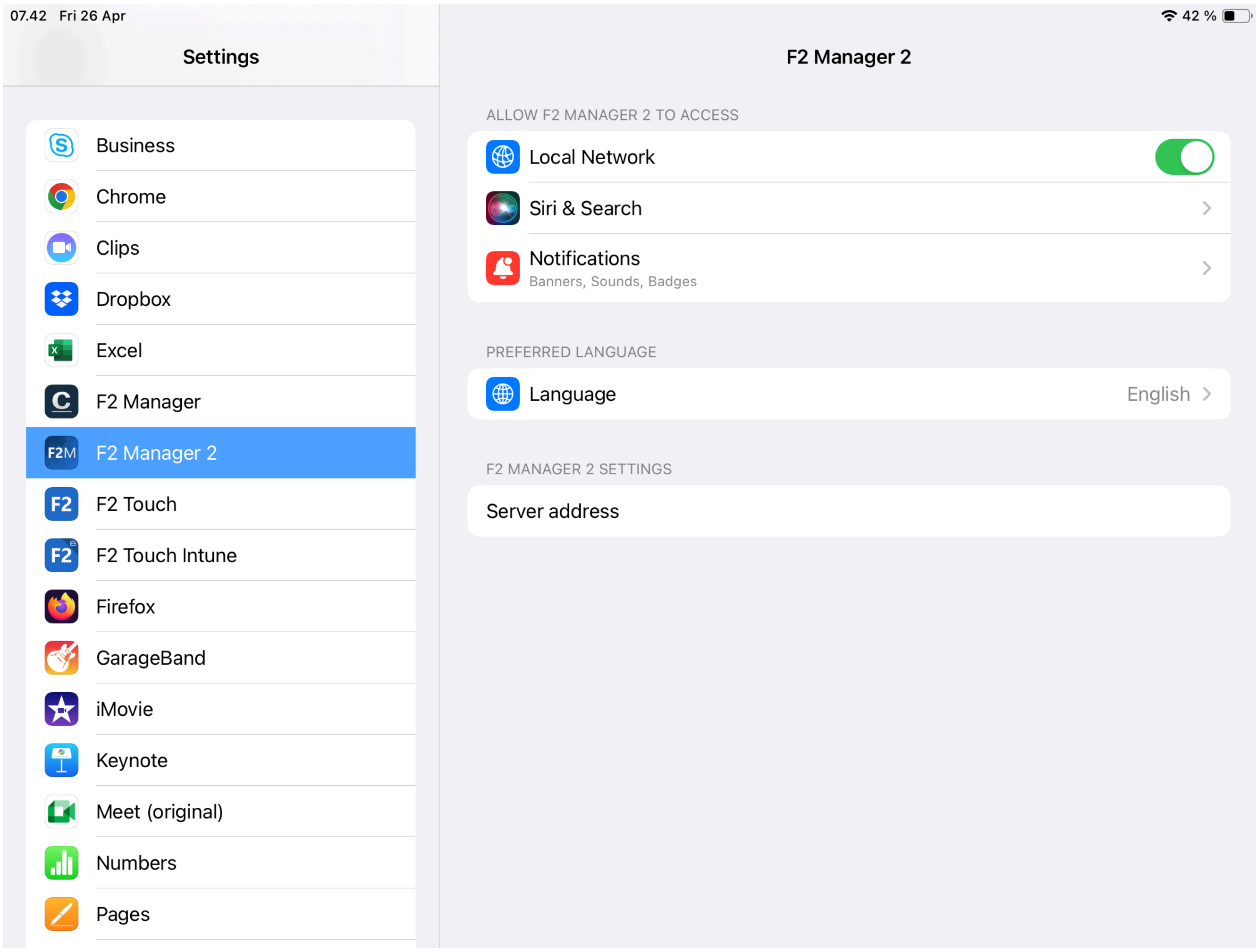


Figure 1. F2 Manager 2 setup

You should have received a URL either from cBrain or your IT department. Enter this URL in the "Server address" field.

Above the server address, it is possible to choose the language for F2 Manager 2. F2 Manager 2 is available in Danish and English. If another language is not selected in the setup, the app will display in the iPad language.

Log in on F2 Manager 2

The first time you open the F2 Manager 2 app, you will be asked to log in. Enter your username and password from F2 and tap **Login**.

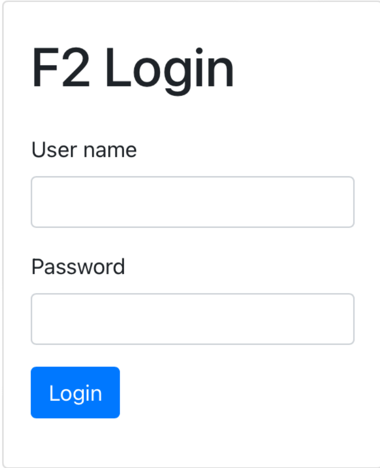


Figure 2. Log in to F2 Manager 2

F2 Manager 2 opens, and you are now ready to get started.

NOTE It is also possible to log in via AD FS through IdentityHub, if it has been configured. Configurations are made in cooperation with cBrain.

Synchronise material F2 Desktop

The following sections describe how to synchronise F2 Manager 2 material using F2 Desktop. Synchronise cases, records, and documents for meetings and projects.

You can also synchronise material using the F2 Meetings add-on (documentation available in Danish).

Approvals are automatically synchronised with F2 Manager 2 when the approval reaches your step in the approval process.

NOTE If you are a gated approver, your gatekeeper will select which approvals are transferred to F2 Manager 2. Read more about the F2 Gateway Approvals add-on.

Synchronise cases and records

All F2 cases can be made accessible in F2 Manager 2. F2 Manager 2 is designed to provide access to materials in connection with meetings. This is why the synchronisation of records and cases to F2 Manager 2 is done through ad hoc meetings in F2 Desktop. Ad hoc meetings can also be created and viewed in F2 Touch. Read more about the F2 Touch procedure.

To add a case to F2 Manager 2 click on the **Add F2 Manager** menu item in the case window as shown below.

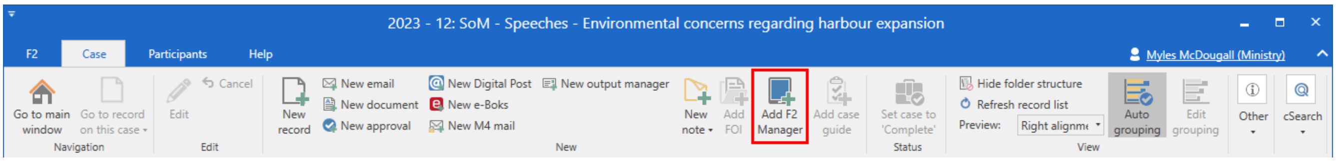


Figure 3. Add case to F2 Manager 2

An “F2 Manager tab” is then added to the case. The “F2 Manager” tab is found furthest to the right, next to the “Participants” tab in the case window. The figure below shows the tab and its sections. The format of the sections resembles a meeting where the case and its associated records and documents are available during a selected time period. Users are added as either meeting participants or stakeholders.

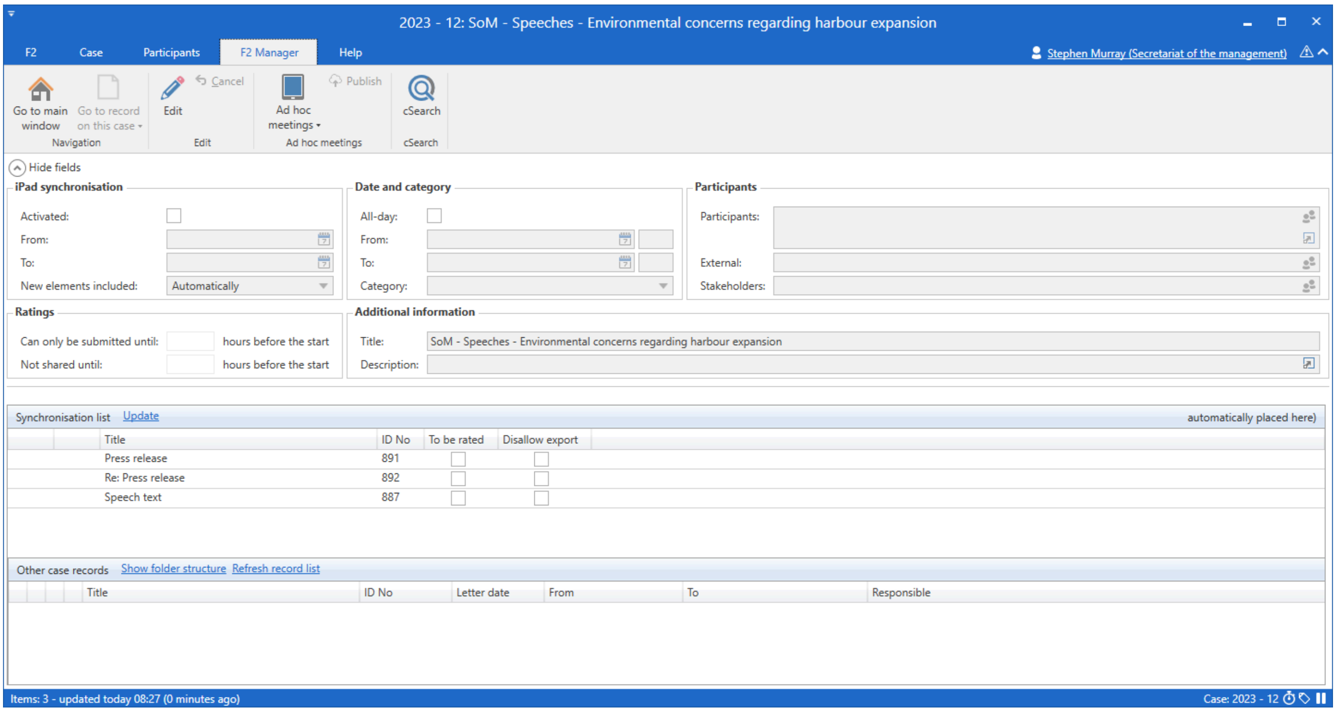


Figure 4. The "F2 Manager" tab in the case window

Click on **Edit** in the ribbon to enter edit mode and set up the synchronisation of the F2 Manager 2 meeting.

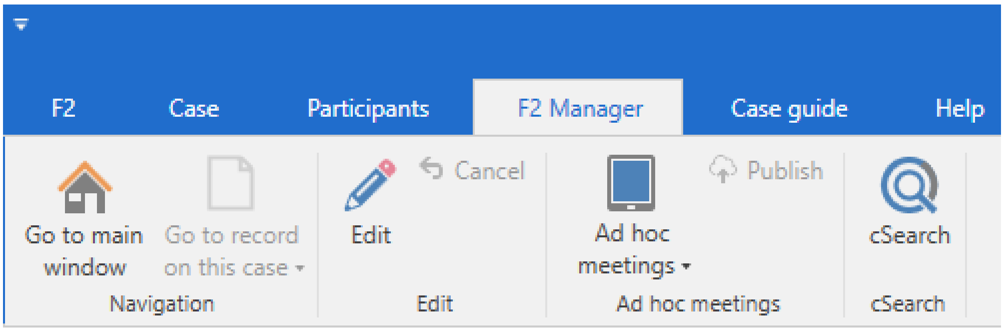


Figure 5. Switch meeting to edit mode

The upper part of the tab contains metadata fields that are related to the iPad synchronisation to F2 Manager 2. The lower part of the tab is dedicated to managing the availability of records and documents.

The relevant metadata fields are the following:

Field	Description
"Synchronise to iPad"	Choose the period of time where the case is synchronised with F2 Manager 2.
"Date and category"	Choose the time and category of the meeting.
"Participants"	Choose which meeting participants should have the meeting synchronised with their F2 Manager 2.
"Additional information"	Add a title and an optional description to the meeting.
"Synchronisation list"	Choose which case records to synchronise with F2 Manager 2. Here you can also order the agenda items.

When you have filled in all relevant metadata fields, click on **Save** in the ribbon to apply your changes and synchronise the case with F2 Manager 2.

iPad synchronisation

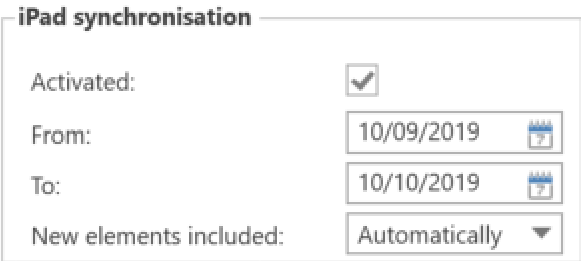


Figure 6. Synchronise to iPad

Tick the “Activated” box to synchronise the records on the F2 Manager tab’s synchronisation list. The records are only synchronised within the specified time period and to the added participants.

Data is not synchronised to the iPad outside the specified time period.

The “New elements included” field is described below in the Automatic vs manual inclusion section.

NOTE	Ticking the “Activated” box automatically fills in the other sections' date and time fields with standard values unless they already contain data. This is useful if the user wants a meeting time of “Now” with a standard synchronisation period.

Date and category

image8

Figure 7. Date and category

A start and finish time can be specified for the meeting. If the meeting lasts an entire day, tick the “All-day” box. Meetings marked as “All-day” are placed at the top of F2 Manager 2’s meetings for the relevant day. Meetings can also last longer than a day even if they have specified “From” and “To” times.

A category can also be selected. This is an optional field used for categorising the meeting. Categories are created by users with the “Value list administrator” privilege. For example, a category named “Administration” can be created for an authority to indicate meetings concerning this topic.

Participants

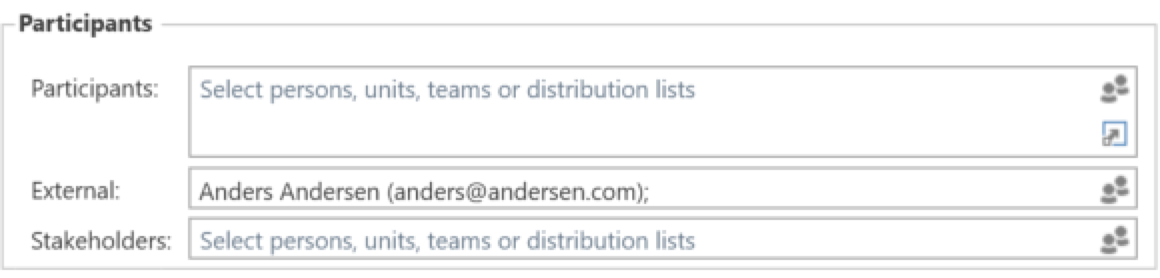


Figure 8. Participants

Meeting participants and stakeholders, both internal and external, are added in the fields of the “Participants” category. Only participants that exist in F2’s participant register can be added.

NOTE	F2 can be configured so that ministers and heads of department can only be added to meetings by users who can act on behalf of them. The configuration is performed in cooperation with cBrain.

Participants

The “Participants” field is used to add meeting participants. Meeting participants receive:

- Read access to the records on the agenda.
- Access to the synchronised records on their iPad in the specified period.

External

The “External” field is used to add external participants who are attending the meeting. A copy of the meeting material can be sent to the added participants using the F2 Web Meetings add-on module (documentation available in Danish).

Stakeholders

The “Stakeholders” field is optional and used to expand the group of F2 users whose iPads are synchronised with the meeting. Stakeholders have the same rights as normal meeting participants except that they cannot rate agenda items.

Additional information

Figure 9. Additional information

When an ad hoc meeting is created it inherits the case title by default. The meeting can be renamed in the “Title” field.

The “Description” field in the “Additional information” category is an optional field used for adding information about the meeting, such as the meeting location or a specific meeting room.

F2 Manager 2 shows the description alongside meeting participants above the agenda in the preview.

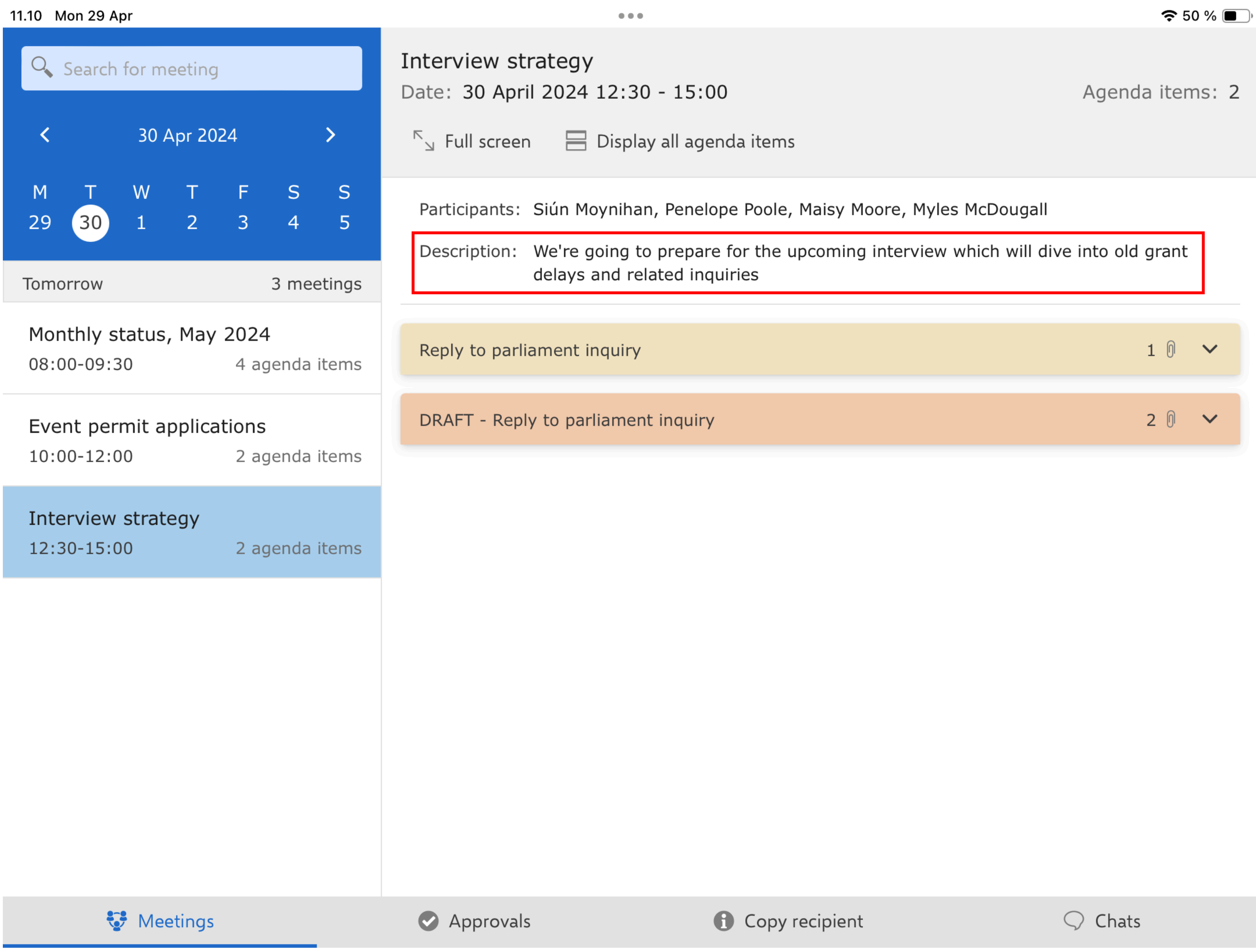


Figure 10. The description as shown on F2 Manager 2

The synchronisation list and other records on the case

The elements on the synchronisation list are the records that will be visible on the iPad after the synchronisation process.

As the name "Other case records" indicates, this field consists of records that have been deselected for synchronisation either manually or automatically. Once the "F2 Manager" tab is added to a case, all case records are automatically added to the synchronisation list.

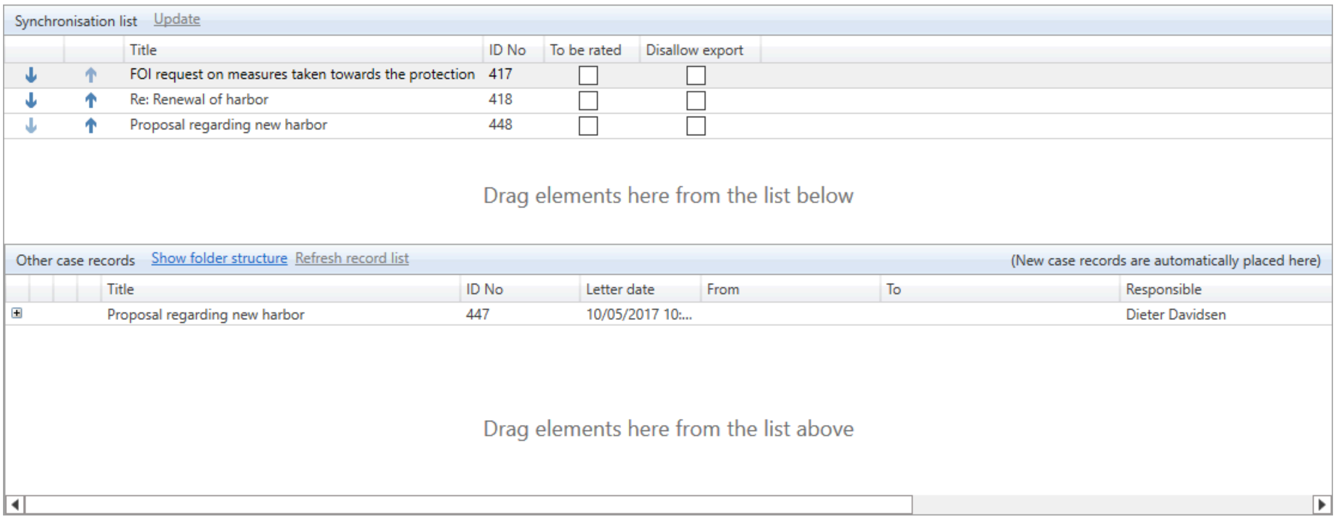


Figure 11. Records in the synchronisation list

Automatic vs manual inclusion

If new records are added to a case, they will synchronise with the iPad depending on the “New elements included” field. This field is found in the “iPad synchronisation” category and is set to either **Automatically** or **Manually** using a drop-down menu.

- **Automatically** means that all records on a case are added to the synchronisation list except for ones the user manually drags to the "Other case records" field. Use automatic inclusion to automatically synchronise new records with the iPad as they are added to the case.
- **Manually** means that none of the records on the case are synchronised except for ones the user drags to the synchronisation list and the records already on it. Use manual inclusion to manually select the agenda items to synchronise with the iPad and avoid synchronising new records on the case along with already synchronised records.

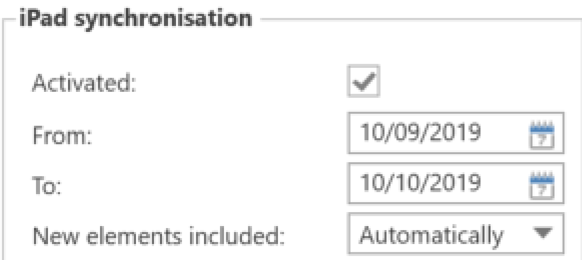


Figure 12. Include new elements

NOTE It is only possible to synchronise records automatically if the user has access to all the case records. If not, manual synchronisation must be used.

A standard value (Automatically/Manually) can be configured to apply for all users. This configuration is performed in cooperation with cBrain.

Select items for synchronisation

Records on the synchronisation list are synchronised with F2 Manager 2 when the synchronisation is activated.

Drag records between the synchronisation list and the “Other case records” list to determine the records for synchronisation.

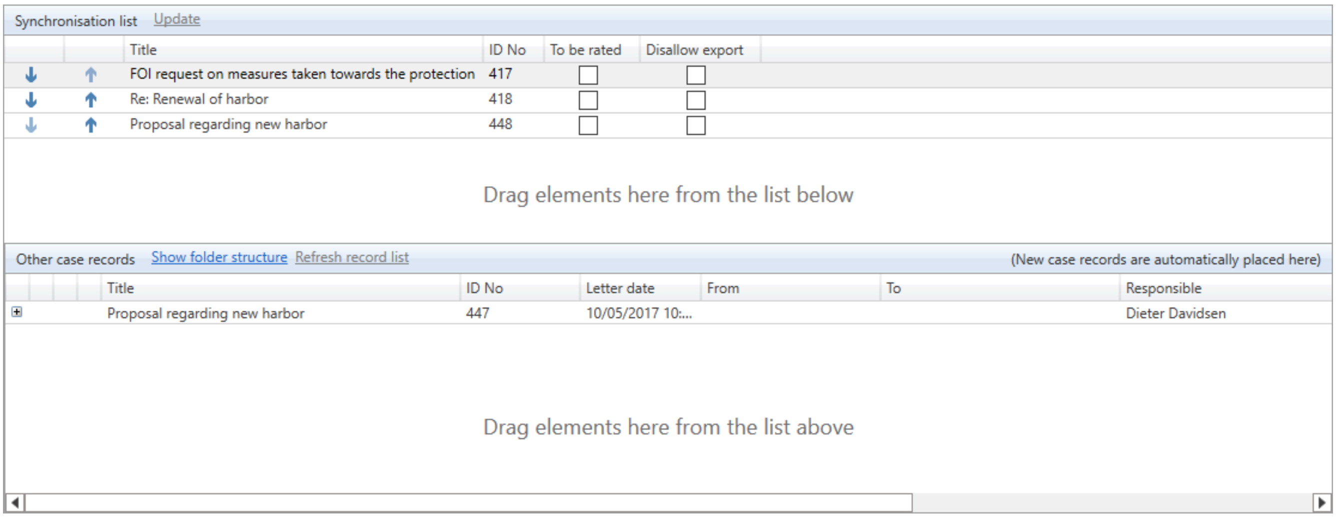


Figure 13. Records in the synchronisation list

Pay special attention to the “New elements included” function as it determines if the records are automatically synchronised or not. The field is further described in the section Automatic vs manual inclusion.

Structuring the agenda items (records)

The records used as agenda items can be ordered on the synchronisation list using the blue arrow icons to the left of the record titles. You can also update the order by dragging and dropping the list items. Similarly, you can drag and drop the items out of the synchronisation list.

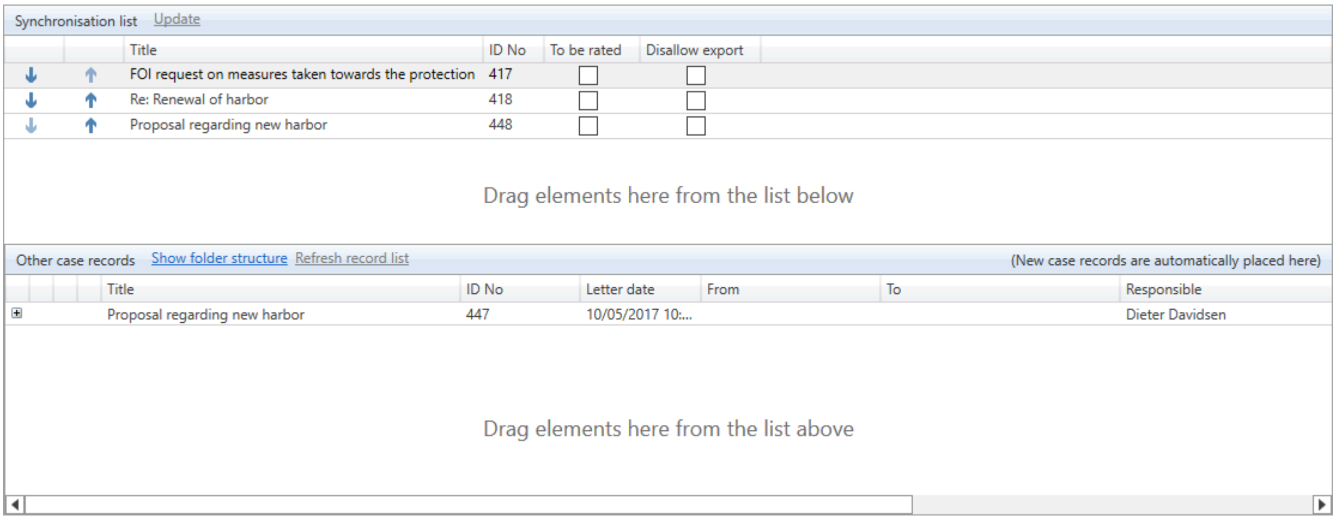


Figure 14. Structure the agenda items

Create multiple ad hoc meetings for the same case

There may be several reasons for a user to create multiple meetings for the same case. For example, if a meeting participant does not have access to all the relevant records.

Click on the **Ad hoc meetings** menu item and select **New ad hoc meeting** in the drop-down menu to create a new ad hoc meeting for the same case. From here, it is also possible to choose between existing ad hoc meetings on the same case.

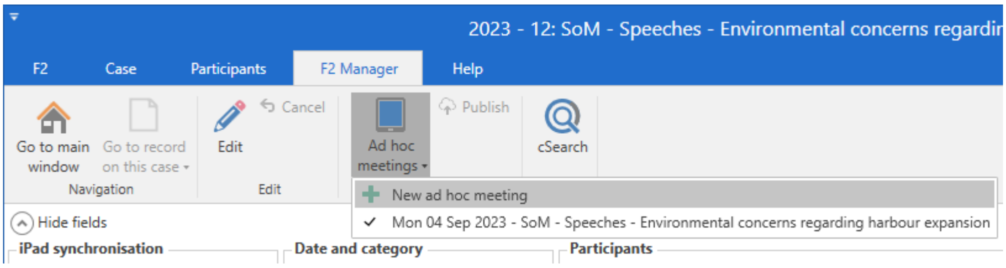


Figure 15. Create and select other ad hoc meetings

Click on **New ad hoc meeting** to create a new meeting on the “F2 Manager” tab. From here you can fill in all relevant metadata fields to set up synchronisation of the new meeting.

The F2 Manager 2 app

The F2 Manager 2 app is split into four different sections (1): Meetings, Approvals, Copy recipient, and Chats.

Each section contains a list of the content in the selected section (2), a search field (3), content preview (4), a ribbon with functions relevant to the selected content (5), and an overview of metadata for the selected content (6).

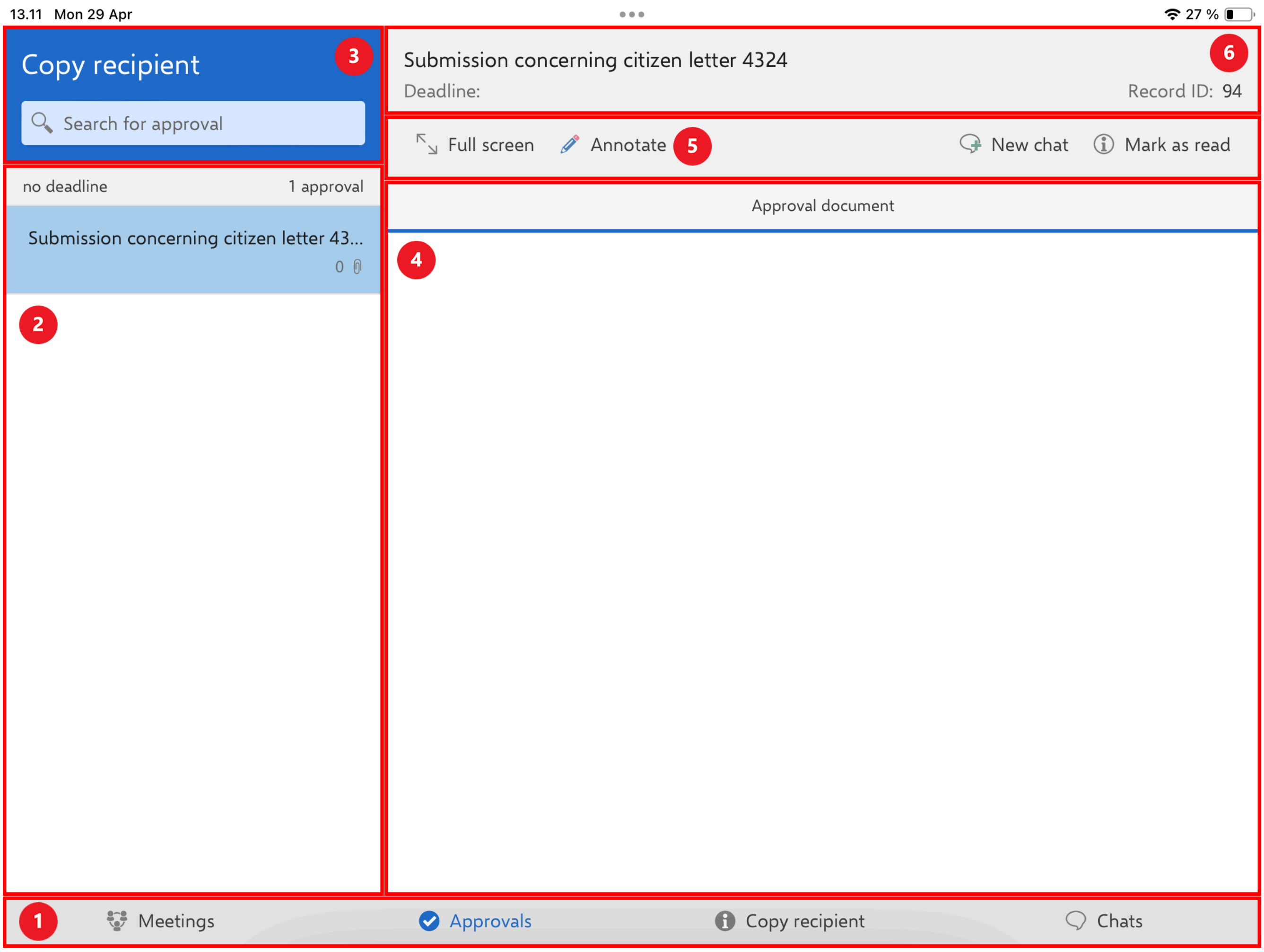


Figure 16. Structure of the F2 Manager 2 app

Press **Full screen** in the ribbon to display the selected content in the preview on the entire screen. Press **Split screen** to return to the default view.

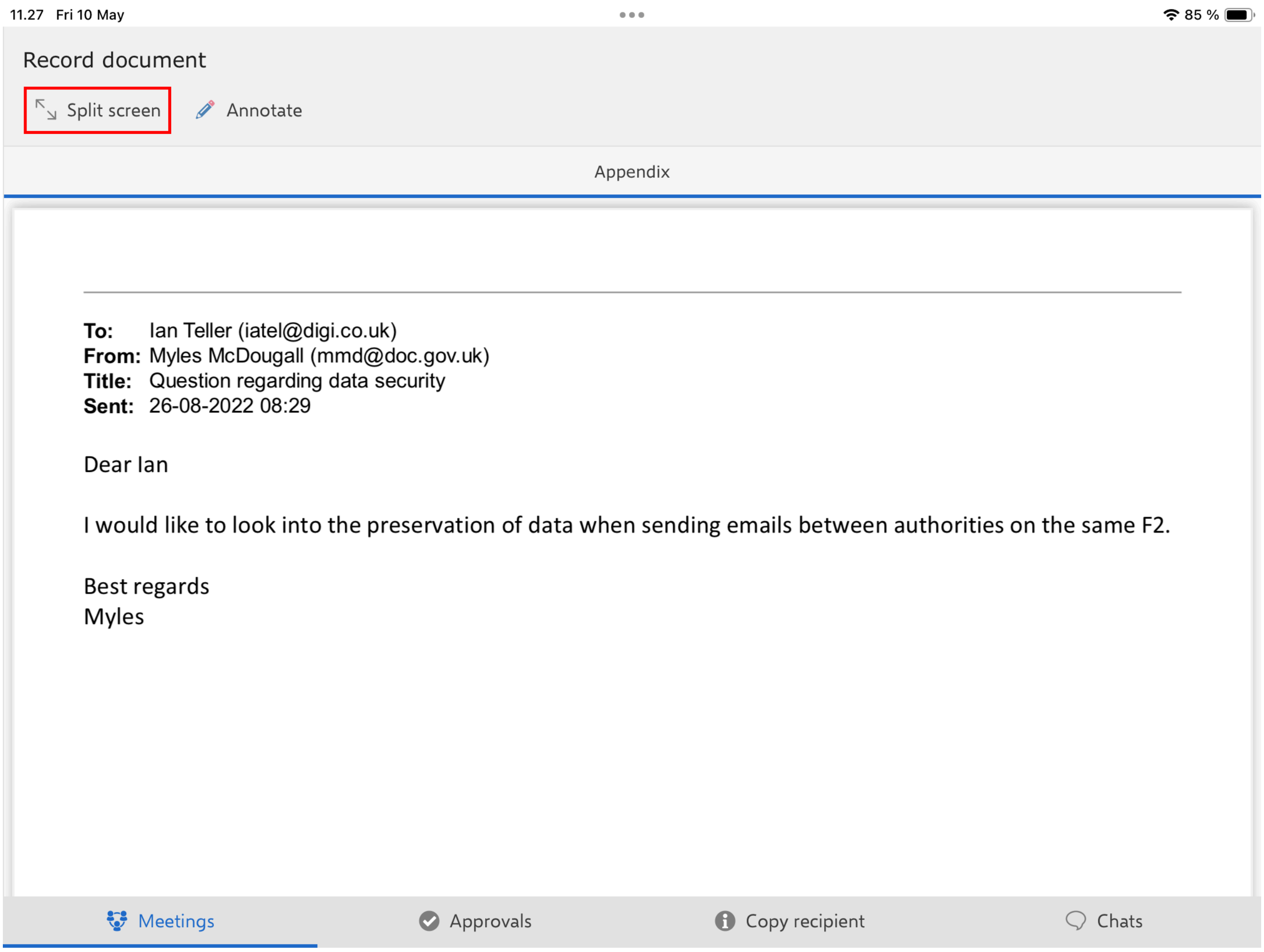


Figure 17. Full screen display

You can use F2 Manager 2 in both horizontal and vertical format.

Push notifications

F2 Manager 2 supports push notifications, ensuring you continuously receive notifications about new activities and updates in F2 Manager 2. Push notifications are received when:

- An approval reaches a step where you are an approver or copy recipient.
- You receive a chat on an approval.
- You receive a chat on an agenda item in a meeting that is available on F2 Manager 2.

Push notifications also show the title of the approval or agenda item.

Figure 18. Push notifications from F2 Manager 2

Meetings in F2 Manager 2

On F2 Manager 2 you have access to cases, records, and documents that have been transferred to the app for meetings and projects. The material is available during the period selected in F2 Desktop when cases and meetings are synchronised via the meeting types referred to as ad hoc meetings and F2 Meetings.

Tap **Meetings** in the bottom ribbon on F2 Manager 2 to open an overview of your meetings.

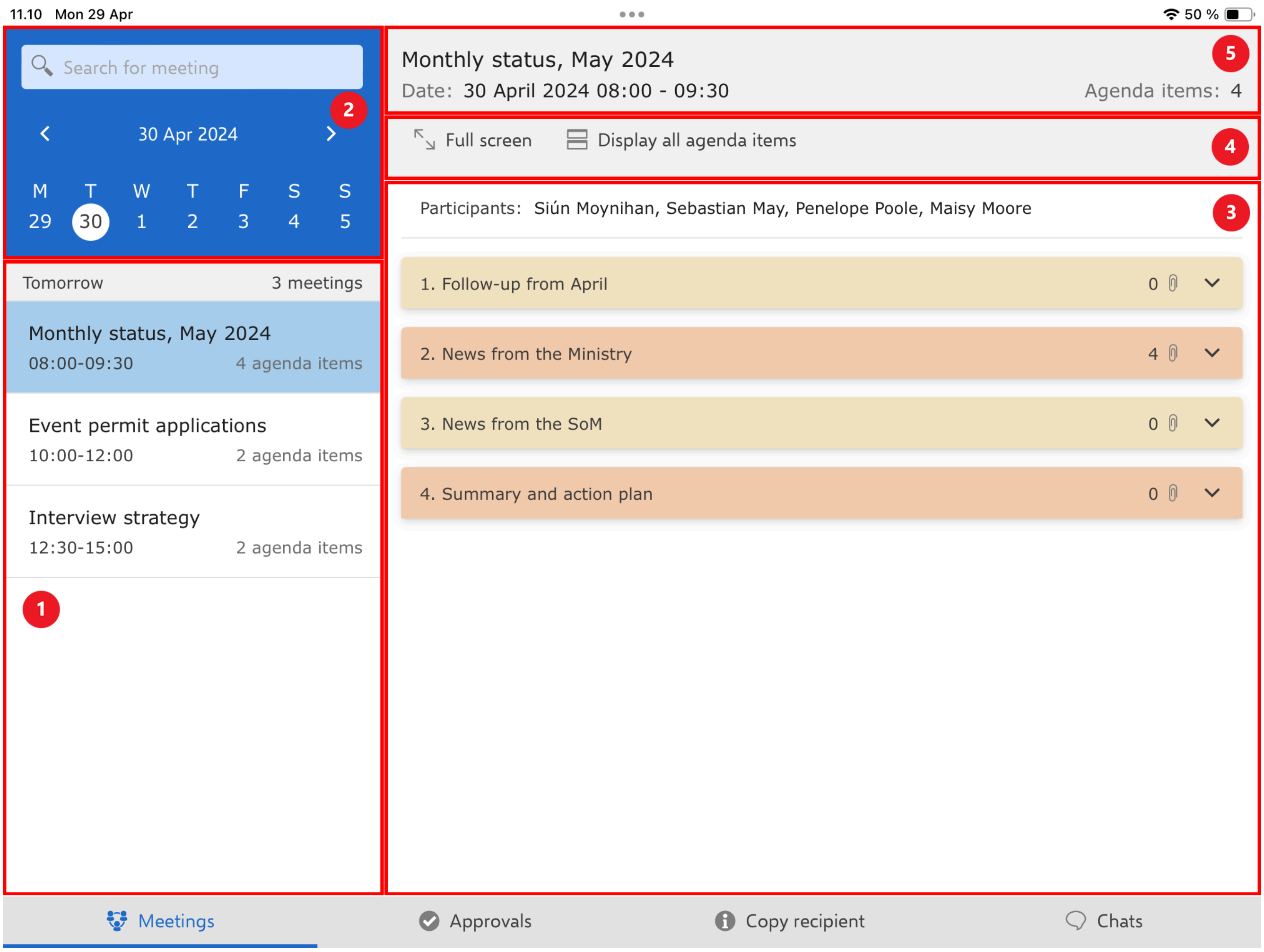


Figure 19. Overview of meetings

In the left side you can see the meetings (1). You can search for meetings using the calendar and search field above the calendar (2). When you tap a meeting in the list, its agenda will be displayed in a preview on the right side (3). Above the preview are functions for reading the meeting (4). Above the functions are the metadata of the selected meeting in the form of title, meeting time, and the number of agenda items (5).

Types of meetings

F2 supports two different types of meetings: ad hoc meetings, and meetings created through the F2 Meetings add-on (documentation available in Danish). Both types of meetings appear on F2 Manager 2 in the same view, except that the record document is displayed as a separate document on the agenda for meetings created with F2 Meetings.

Ad hoc meetings are transferred to F2 Manager 2 when a case is synchronised to the iPad from F2 Desktop.

Meetings are created in F2 Desktop and are available through the F2 Meetings module. Unlike ad hoc meetings, which are automatically transferred when a case is synchronised to F2 Manager 2, F2 Meetings are used for the purpose of creating and scheduling meetings in F2 Desktop independently of F2 Manager 2. The state of agenda items must be set to "Draft" or "Final" for them to be synchronised to F2 Manager 2.

The meetings

Meetings are displayed in the meetings with their title, meeting time, and the number of agenda items. The list is sorted by meeting time. Meetings set to last all day are found at the top of the list.

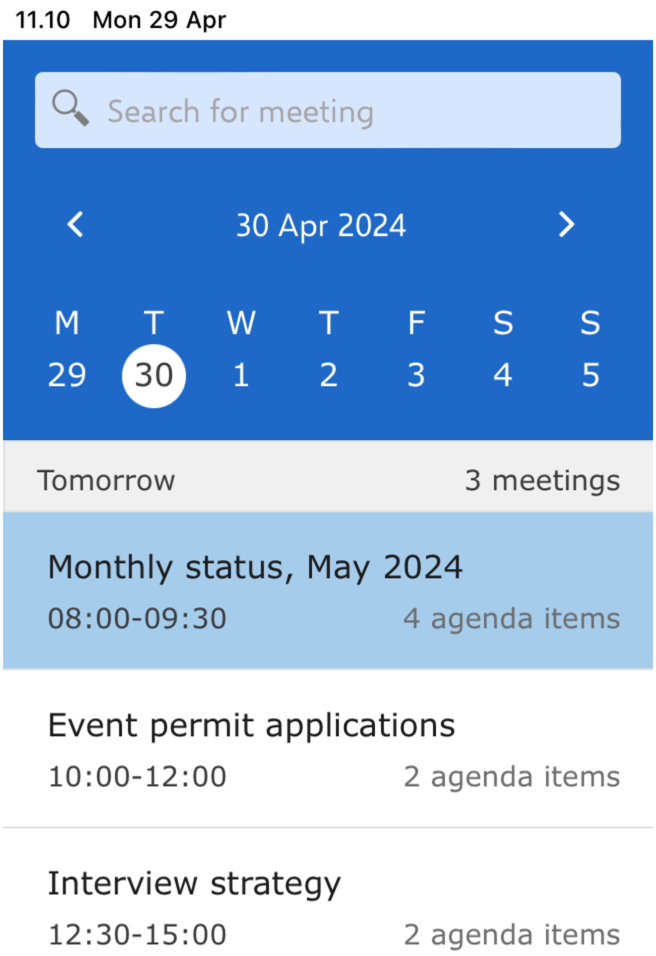


Figure 20. The meetings list

Search for a meeting

To find a specific meeting, select the day of the meeting in the calendar. The calendar shows one week at a time. Use the arrows to switch between weeks. In the search field above the meetings, you can search for meetings on the day you have chosen. You search by meeting titles.

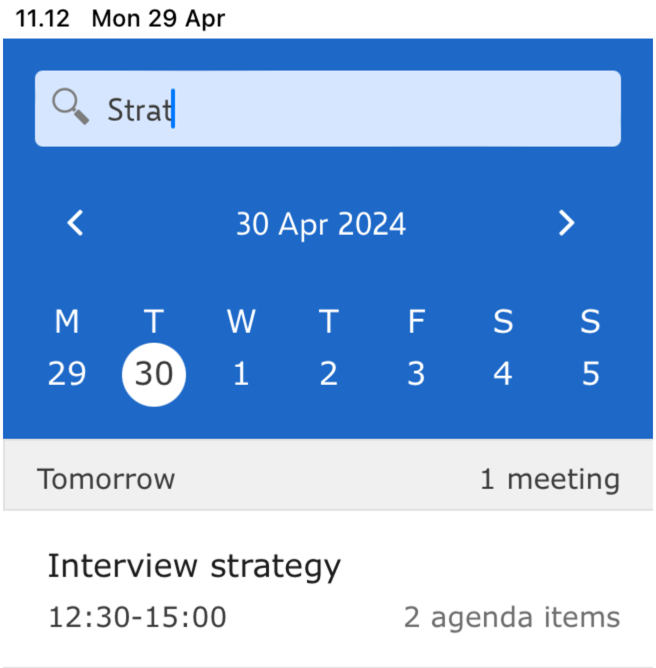


Figure 21. Search for meetings

Meeting ribbon functions

The ribbon above the preview contains menu items for working with the meeting.

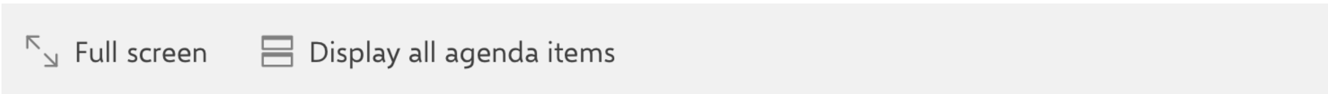


Figure 22. Functions in the meetings ribbon

When the ribbon is shortened, the menu items are gathered in the "More" drop-down menu.

The functions are as follows:

Function	Description
"Full screen"	Display the selected content on the entire screen.
"Split screen"	Restore the default view.
"Display all agenda items"	Expand all agenda items.
"Hide all agenda items"	Collapse all agenda items.

Read and annotate agenda

Each meeting has an agenda, which consists of records that form the individual items. You can read and annotate agenda items and their attached documents.

When you tap a meeting in the list on the left, its agenda is displayed in the preview on the right. Agenda items are collapsed, and the number of attached documents is shown next to the attachment icon on each item. Tap an agenda item to expand it and view the item's attached documents. Unread documents are bolded. Above the agenda are meeting participants and any meeting description.

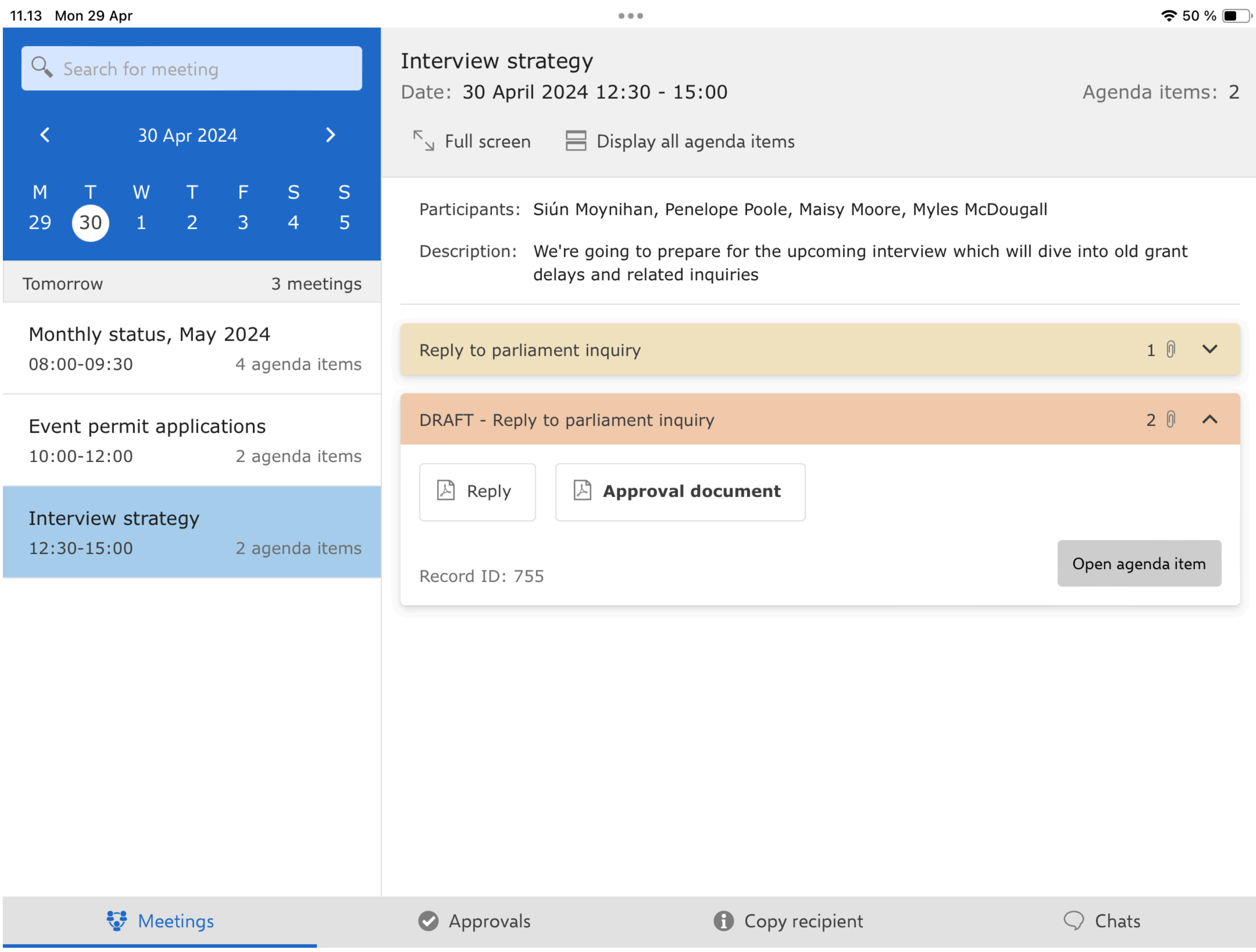


Figure 23. Read through the agenda

Tap **Full screen** in the ribbon to display the agenda on the entire screen. Tap **Split screen** to restore the default view.

Tap **Display all agenda items** to expand all agenda items for the selected meeting. Tap **Hide all agenda items** to collapse the items again.

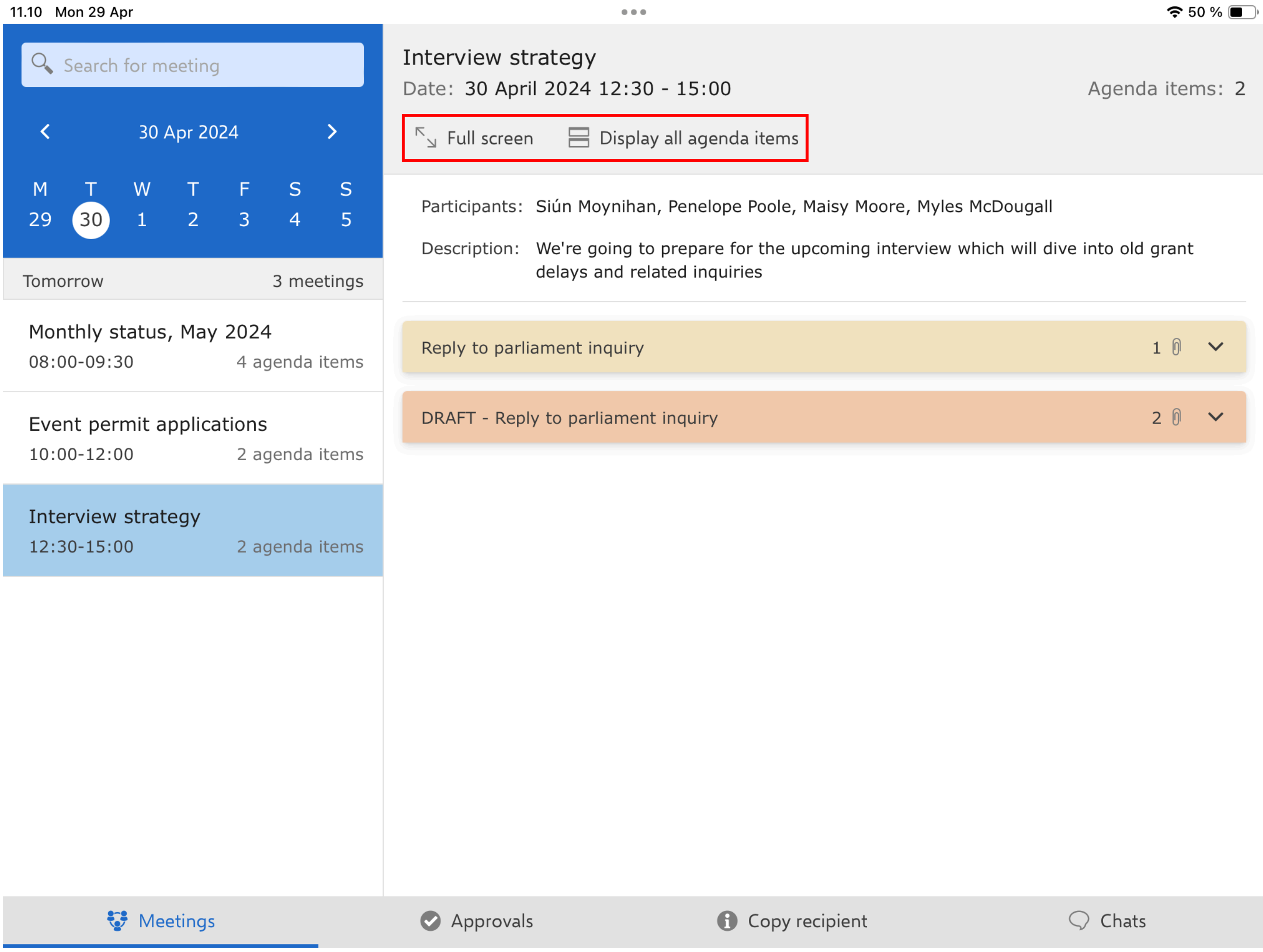


Figure 24. Expand agenda

Read through agenda items and documents

While an agenda item is expanded, you can read its attached documents. Tap a document to open it or tap **Open agenda item** to open the actual document related to the agenda item. The agenda item document corresponds to the record document of the relevant record.

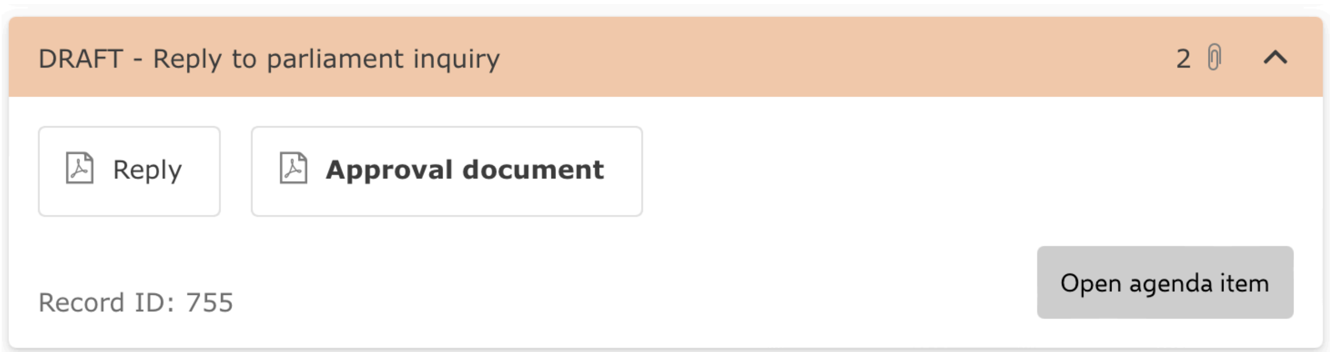


Figure 25. Agenda item

When you open an agenda item or a document on an item, the agenda view opens.

In the agenda view, the agenda is displayed as a list on the left side. Tap an item to expand a list of its attached documents. The number of documents attached to an agenda item is shown next to the attachment icon on the item. Unread documents are bolded in the list.

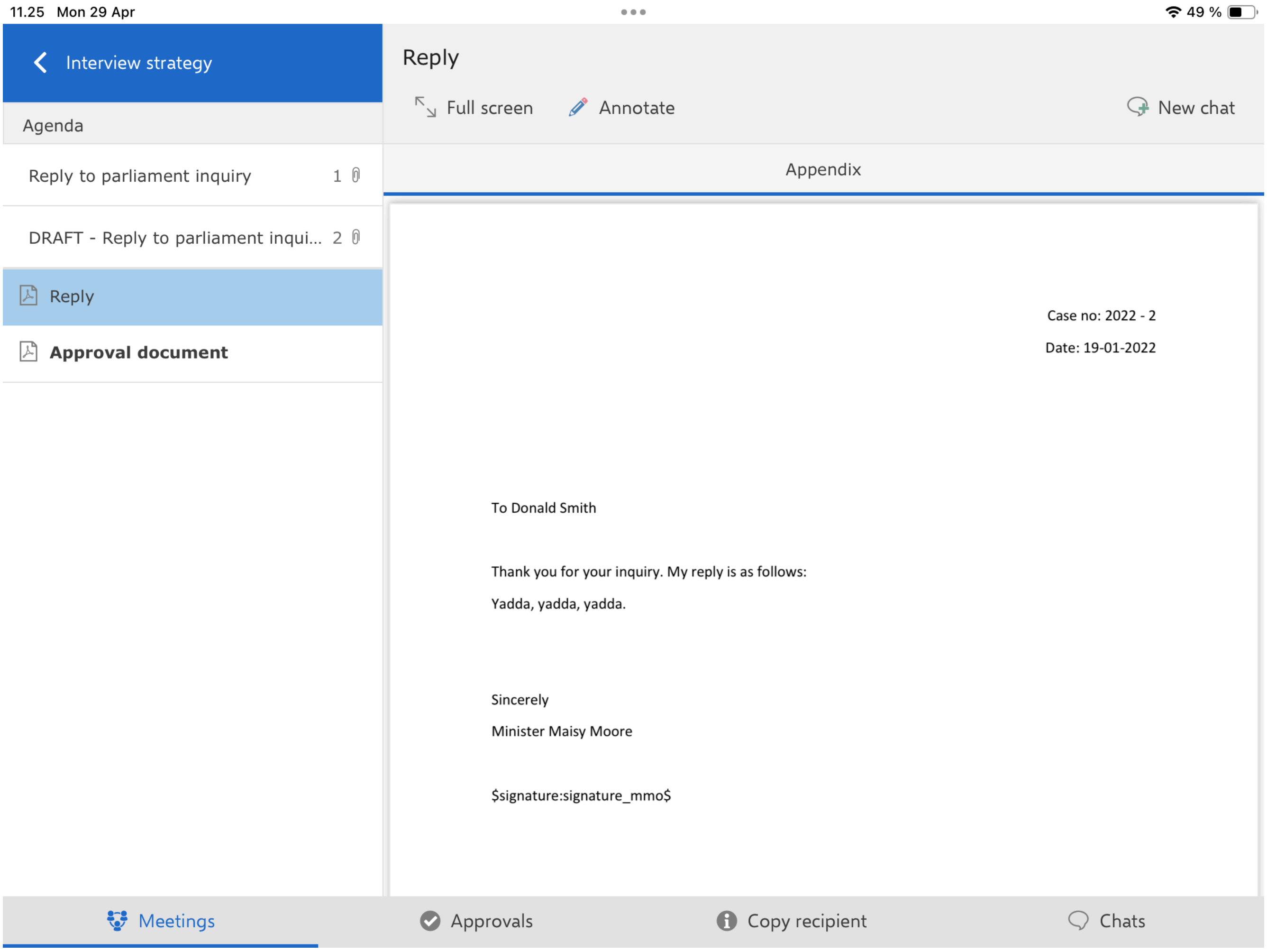


Figure 26. The agenda view

Tap an agenda item or an attached document to preview it on the right.

Tap **Full screen** in the ribbon to display the selected document on the whole screen. Tap **Split screen** to restore the agenda view.

The agenda for meetings created with F2 Meetings

Meetings in F2 Manager 2, created with F2 Meetings (documentation available in Danish), display agenda items in a different way than meetings created as ad hoc meetings. When records are added to agenda items, their record documents and any attachments are added as appendices. For this reason, it is possible to toggle whether the record documents are included as documents on F2 Manager 2. The agenda item document displays any description added to the agenda item via F2 Meetings.

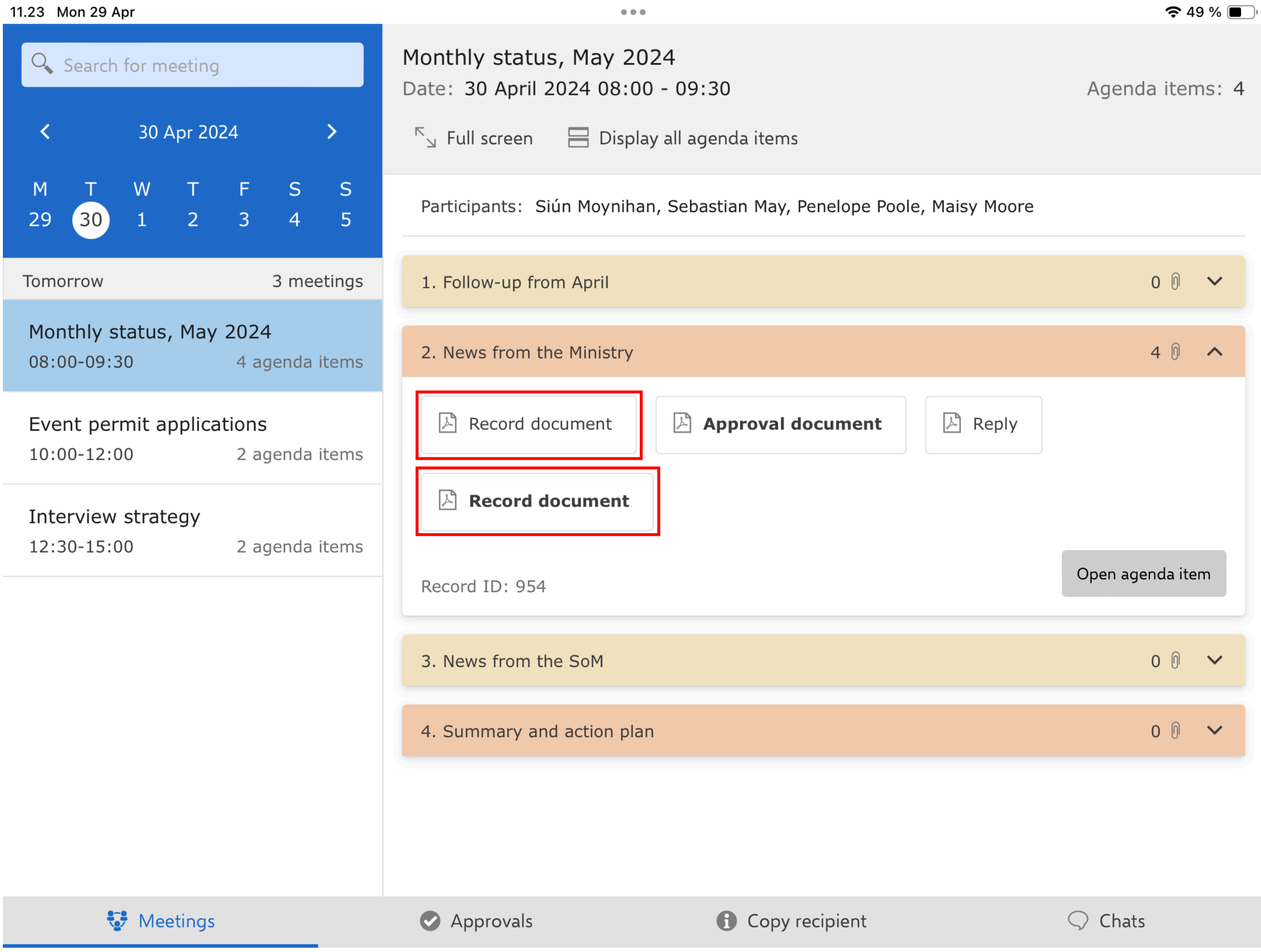


Figure 27. Access records attached to an agenda item

Annotate agenda items and documents

You can annotate an agenda item and its attached documents. Tap the relevant document in the agenda view, and then tap **Annotate** in the ribbon to open the selected document in annotation mode.

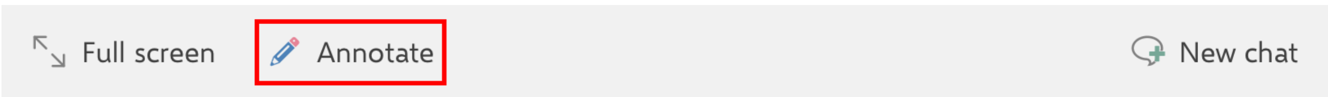


Figure 28. Start annotating from the ribbon

In annotation mode the annotation toolbox is placed at the bottom of the screen by default. You can move the toolbox by tapping it and dragging it to the desired location. F2 Manager 2 remembers where you placed the toolbox next time you open a document in annotation mode.

Tap the desired tool to start using it. Read more about annotation tools in Apple's online documentation.

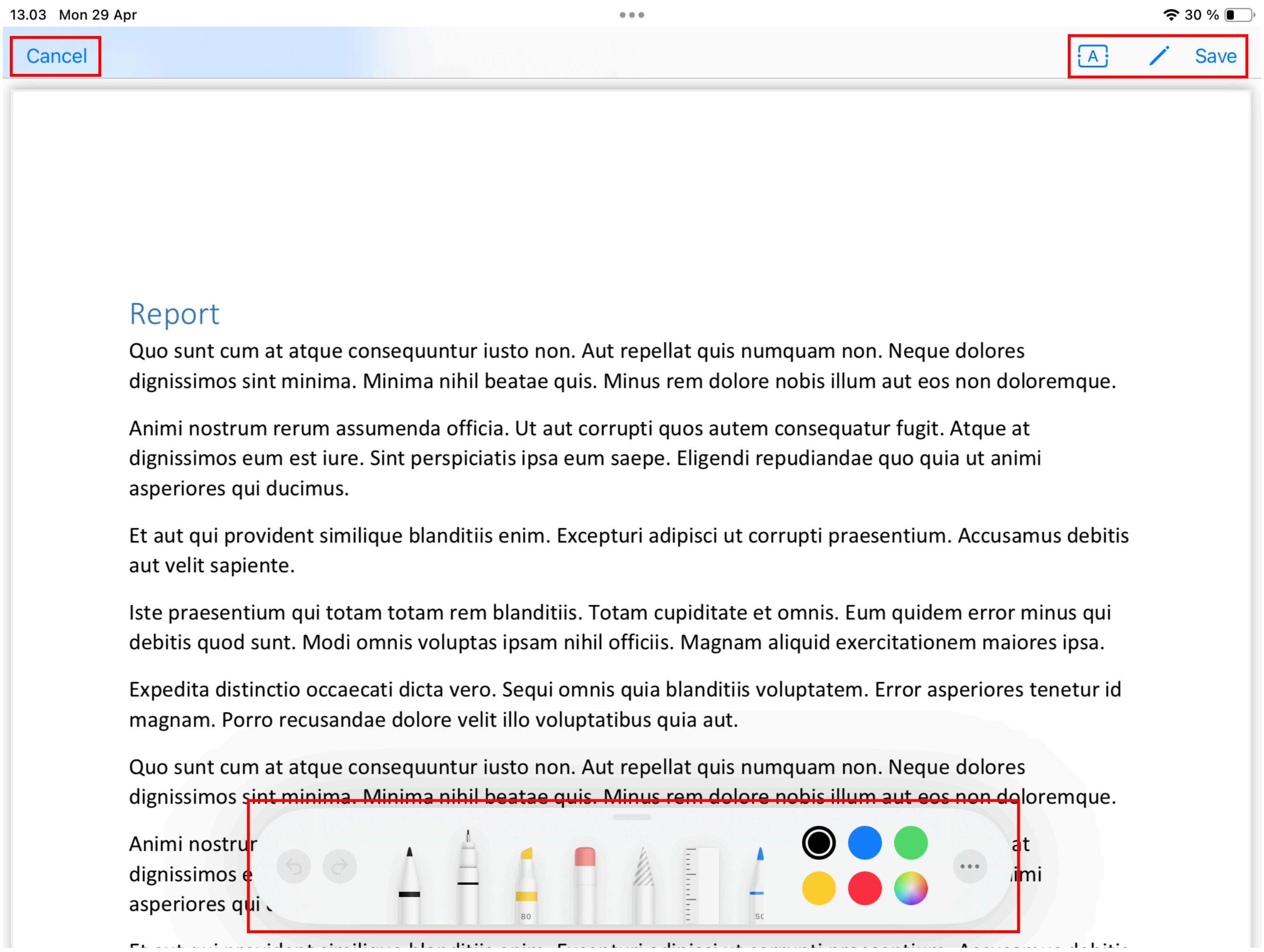


Figure 29. A document in annotation mode

Tap **Cancel** in the upper toolbar at the top to undo your recent annotations and return to the agenda view.

Tap **Save** in the upper toolbar at the top to save your latest annotations and return to the agenda view.

The annotated document is saved as a PDF file on F2 Manager 2 and in F2 Desktop. When you reopen the document on F2 Manager 2, you can choose to view the PDF file with your annotations or you can choose to hide the annotations and view the original document.

The PDF file with the annotations can be accessed from F2 Desktop, where all annotated documents from meetings are gathered in one case. The filename for the PDF will be "[Original title] (annotated by [username])".

A pencil icon in the list of the agenda view indicates that the document has been annotated.

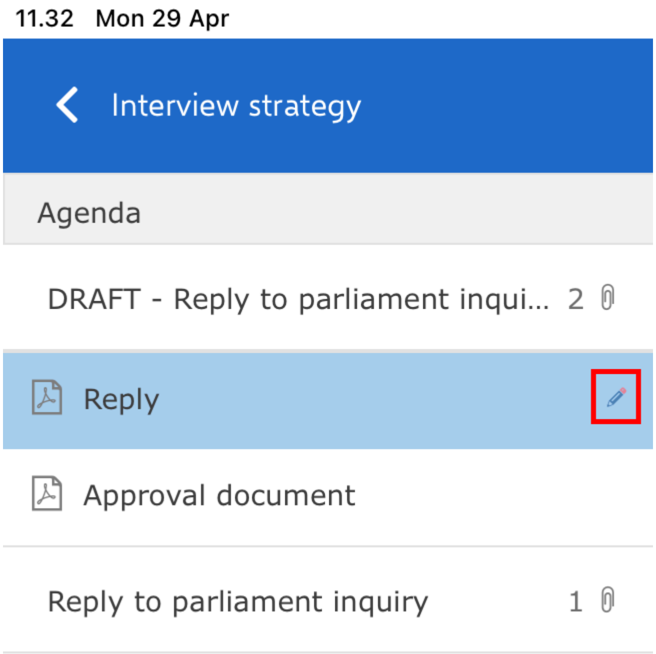


Figure 30. A pencil icon indicates annotations

WARNING If changes have been made to the original document after you annotated it, e.g. another user has updated the document in F2 Desktop, you may end up overwriting your original annotations if you annotate the new version of the original document.

Accessing annotated documents from F2 Desktop

F2 automatically collects all annotated documents on one case entitled "F2 Manager archive for [Username]". This is done regardless of the documents' original case attachment. This case contains all the records with documents annotated by the user in PDF format. F2 creates a record for every record on the case that has an annotated document. If one of the original records has several annotated documents attached, they are all saved on the same record as shown in the figure below.

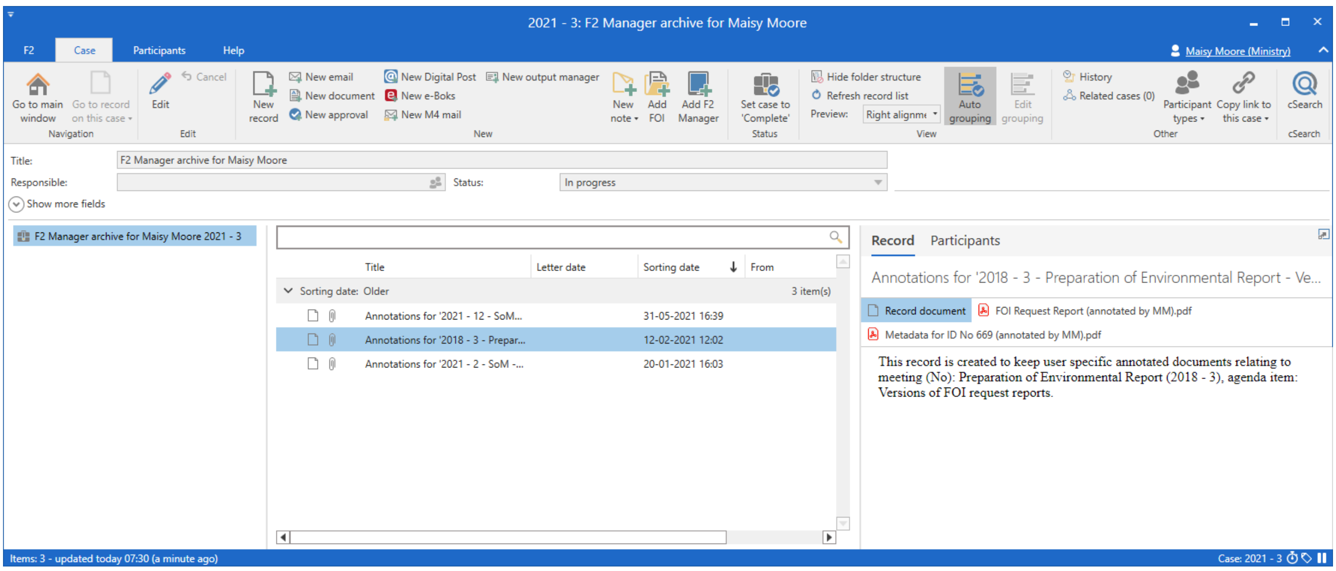


Figure 31. Annotated documents on the same record

By default, only the user who made the annotations can access the "F2 Manager archive for [Username]" case and its annotated documents, because their access level is automatically set to

“Involved” and case access is restricted to the user. The annotations are thereby kept private and cannot be found by others. As with other records in F2 it is still possible to share the records with other users, e.g. by changing the access level or by chatting the record to another user.

NOTE	The automatic access restriction on the case can be disabled through a configuration. The records on the case will retain the "Involved" access level.

Toggle annotation visibility

You can hide your saved annotations. Tap **Hide annotations** in the ribbon above the preview to see the original document without your annotations.

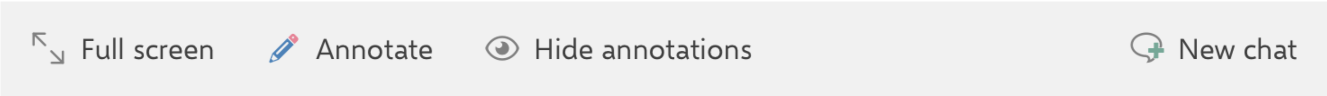


Figure 32. Hide annotations in the document

Tap **Show annotations** to view your annotations again.

Chat from an agenda item

You can chat on the individual agenda items from F2 Manager 2. When you chat on an agenda item, you are chatting on the record that constitutes the item. If there is a chat on an agenda item, it will be displayed on the "Chat" tab above the preview of the agenda item. From the ribbon, you can create a new chat.

You have a complete overview of all your chats on F2 Manager 2 in the chats list.

Create a new chat on an agenda item

Tap **New chat** in the ribbon to create a chat on the selected agenda item.

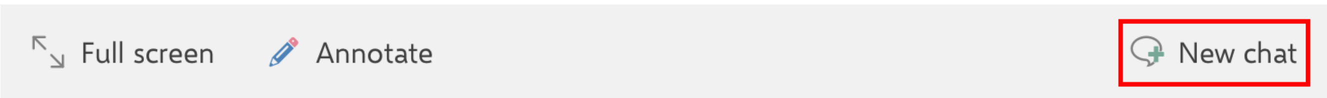


Figure 33. Create a chat on an agenda item

A dialogue opens where you can add chat participants. F2 Manager 2 suggests your most frequently used chat participants. When you start typing in the "Search for chat participants" field, F2 Manager 2 searches for users in F2’s participant register. You can add multiple chat participants at once.

When you have added your desired participants, tap **OK** to create the chat. Tap **Cancel** if you do not wish to create the chat.

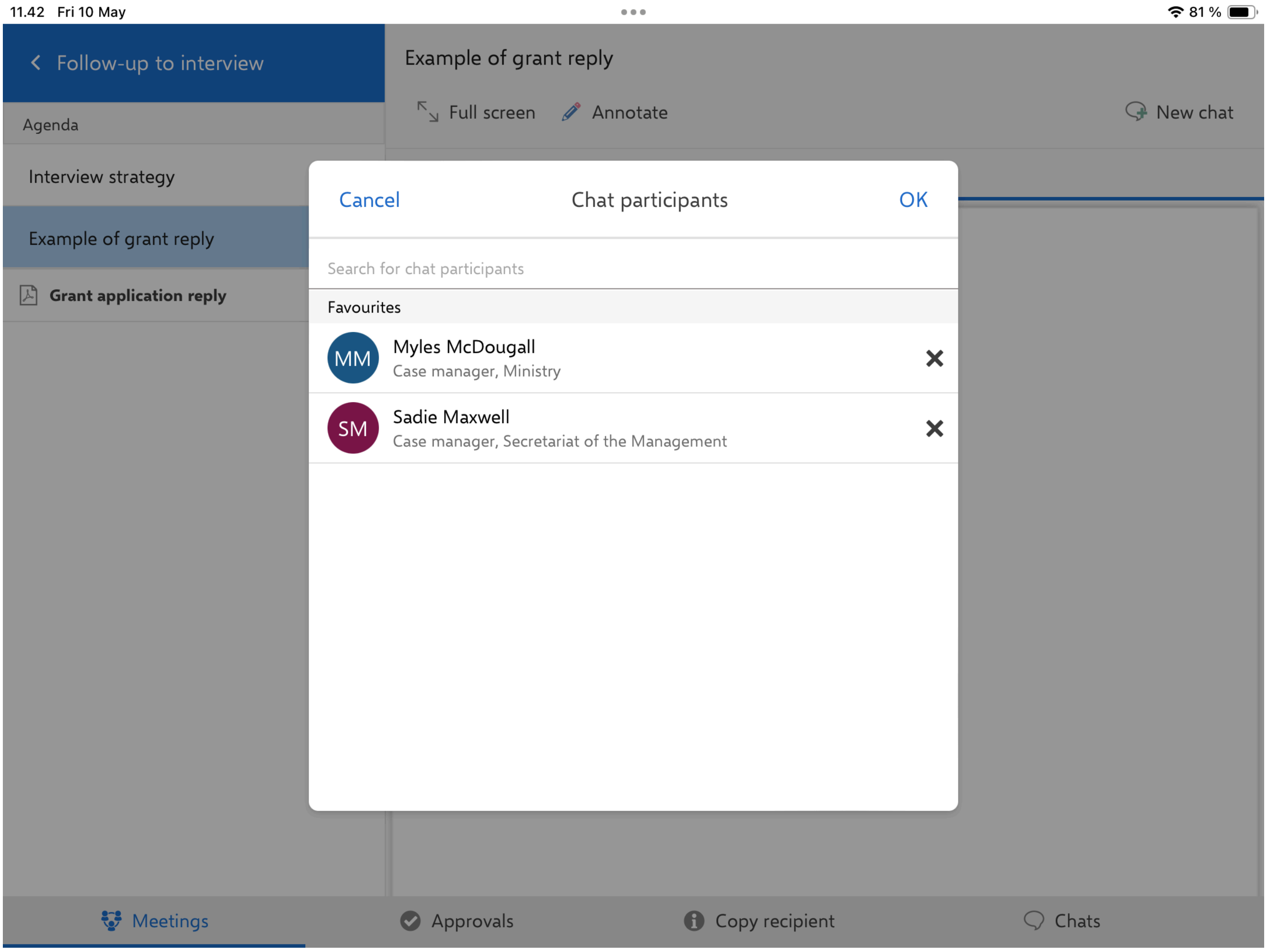


Figure 34. Add chat participants

After you tap **OK**, the chat window opens.

Your selected chat participants are displayed at the top of the chat window. You can write your message in the compose box at the bottom. Tap the **send chat icon** to send your message.

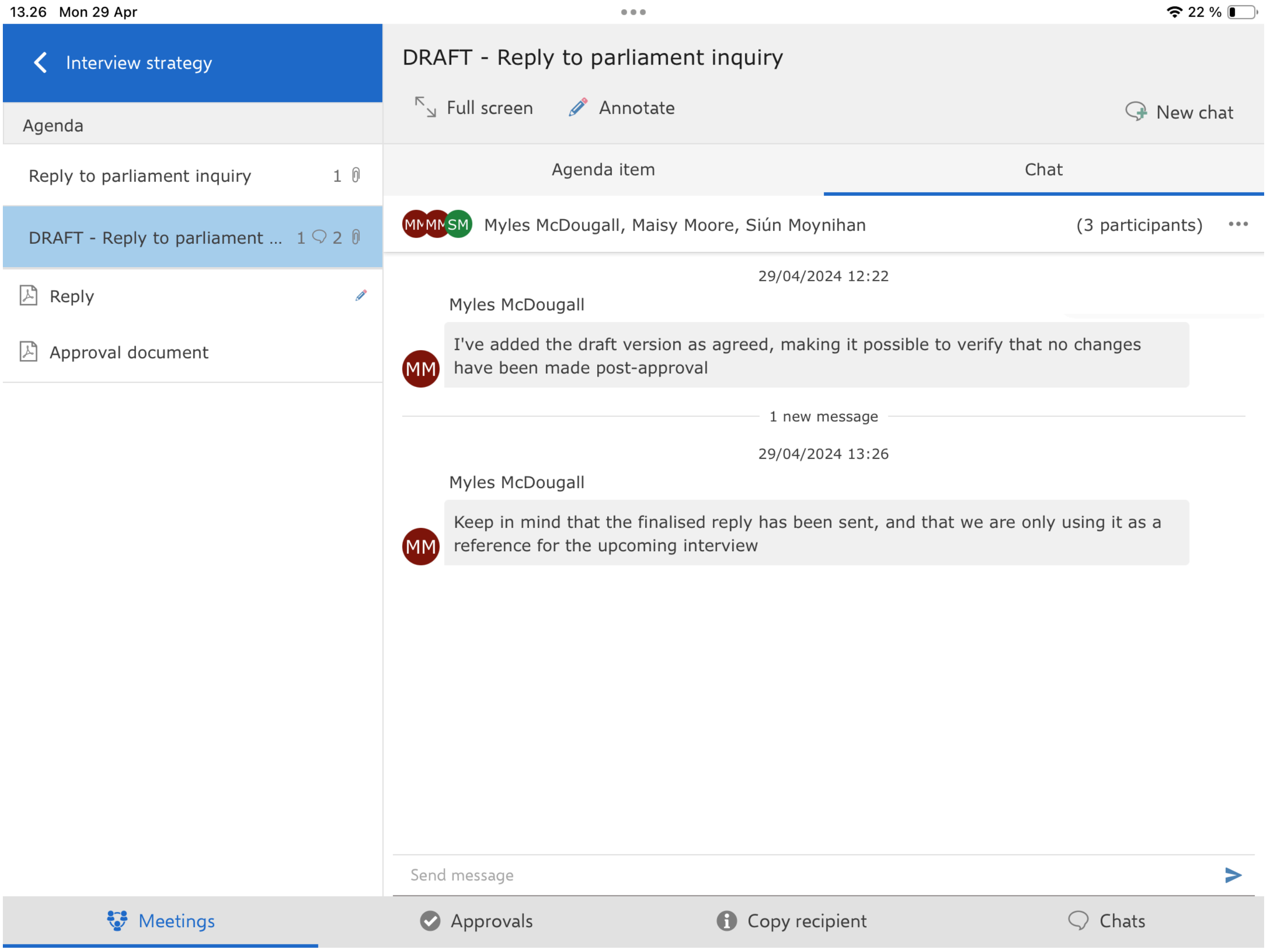


Figure 35. The chat window

The chat is also available on the chats list.

View chats on an agenda item

When there is one or more chats on an agenda item, the "Chat" tab will be displayed above its preview. If there is an unread chat on an item, the "Chat" tab will be bolded for the given item, and the chat itself will also be bolded.

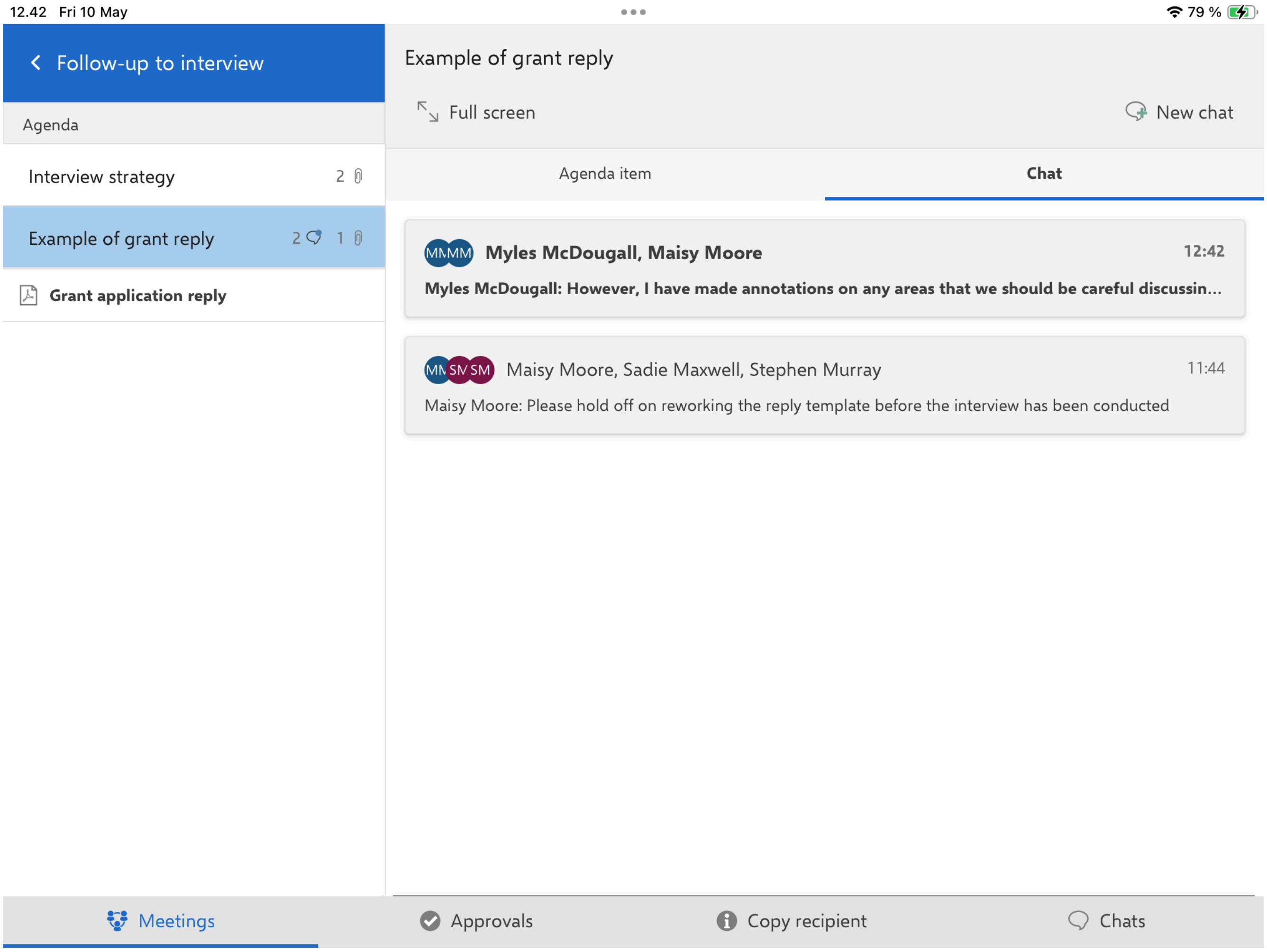


Figure 36. Chats on an agenda item

Tap a chat to open the chat window.

A chat icon in the list of the agenda view indicates that chats exist on an agenda item. The number of chats on each item is also displayed.

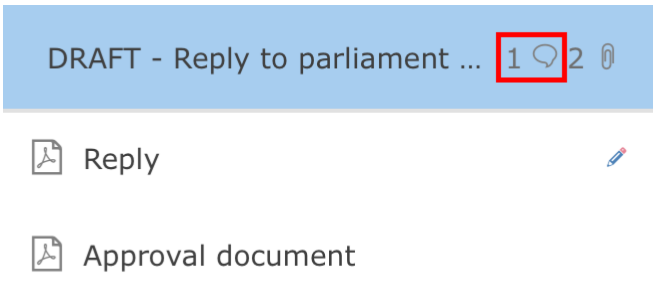


Figure 37. Chat icon on an agenda item

View chats from the agenda

Chats are also shown as part of the agenda when you expand an agenda item. Unread chats are bolded.

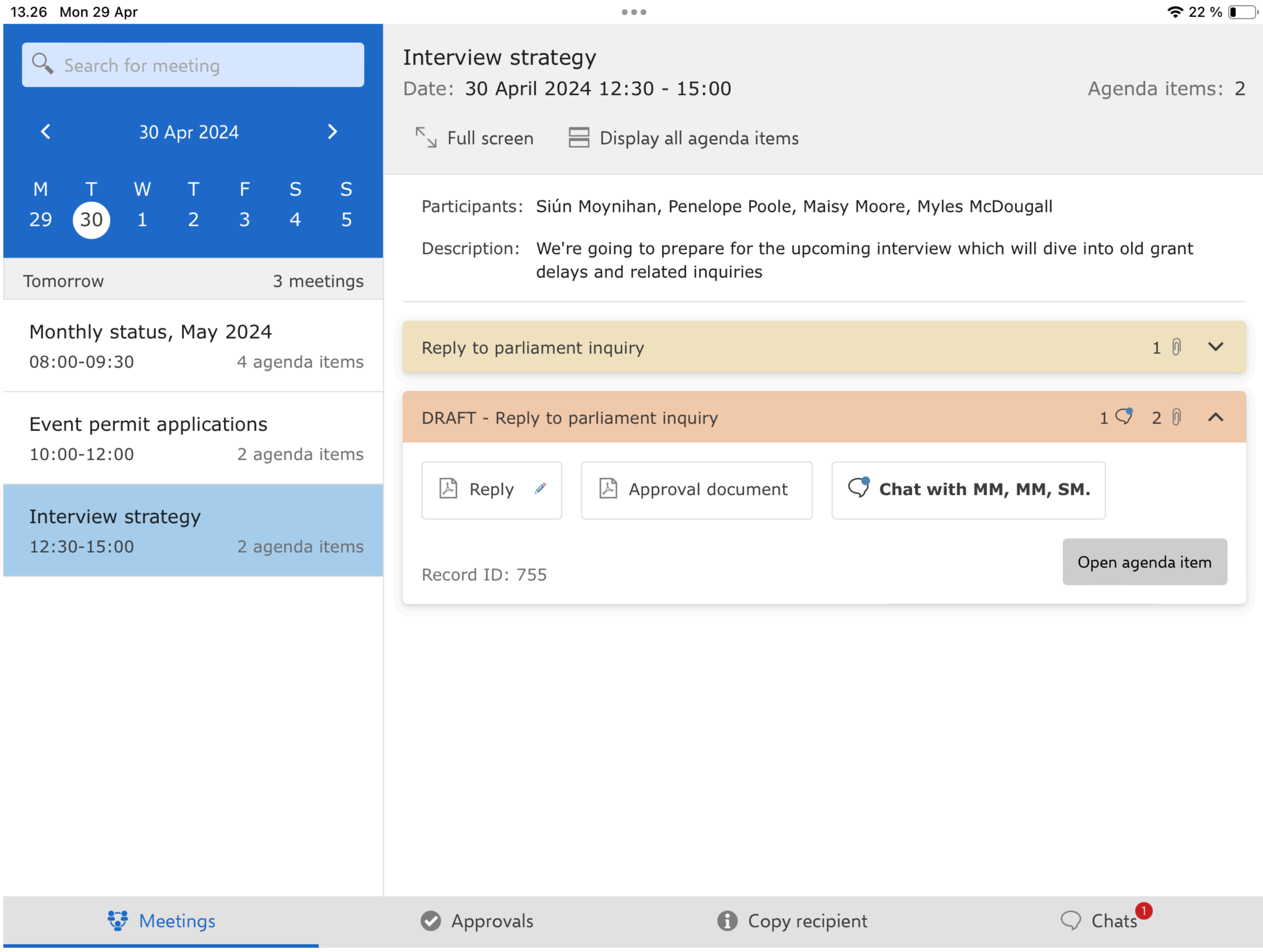


Figure 38. Chats on an agenda item

Approvals in F2 Manager 2

F2 Manager 2 gives you access to active approvals where you are the approver at the current step. An approval is transferred to F2 Manager 2 when it is sent to a step where you are an approver. The approval disappears from F2 Manager 2 when you return or approve it and it thus leaves your step.

Tap **Approvals** at the bottom of the ribbon on F2 Manager 2 to display a list of all available approvals.

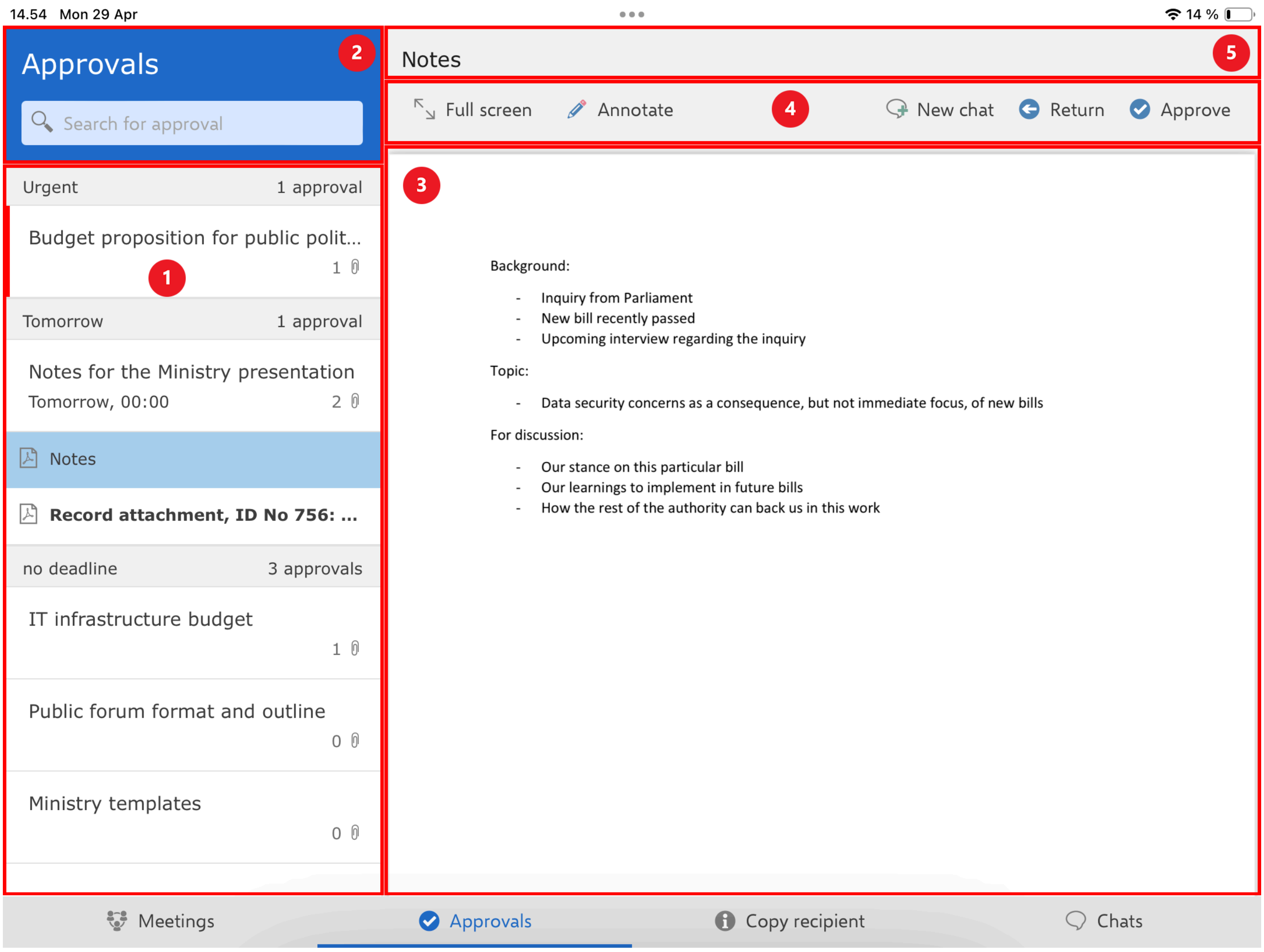


Figure 39. Overview of approvals

On the left you can see a list of transferred approvals (1). You can search for approvals using the search field above the list (2). When you tap an approval in the list, the approval document will be displayed in a preview on the right (3). Above the preview are functions for processing the approval (4). Above these functions are the metadata of the selected approval such as title, deadline, and record ID for the record associated with the approval (5).

NOTE	If you are a gated approver, your gatekeeper will select which approvals are transferred to F2 Manager 2. Some approvals may not be transferred to F2 Manager 2 even though you are an approver on the current step of the approval. Read more about the F2 Gateway Approvals add-on.

The approvals list

Approvals are displayed in the approvals list with title, deadline, and the number of attached documents. The list is sorted by approval deadline. If there are multiple approvals with the same deadline, they are grouped. The deadline and the number of approvals in the grouping are shown in the grey band above a group of approvals.

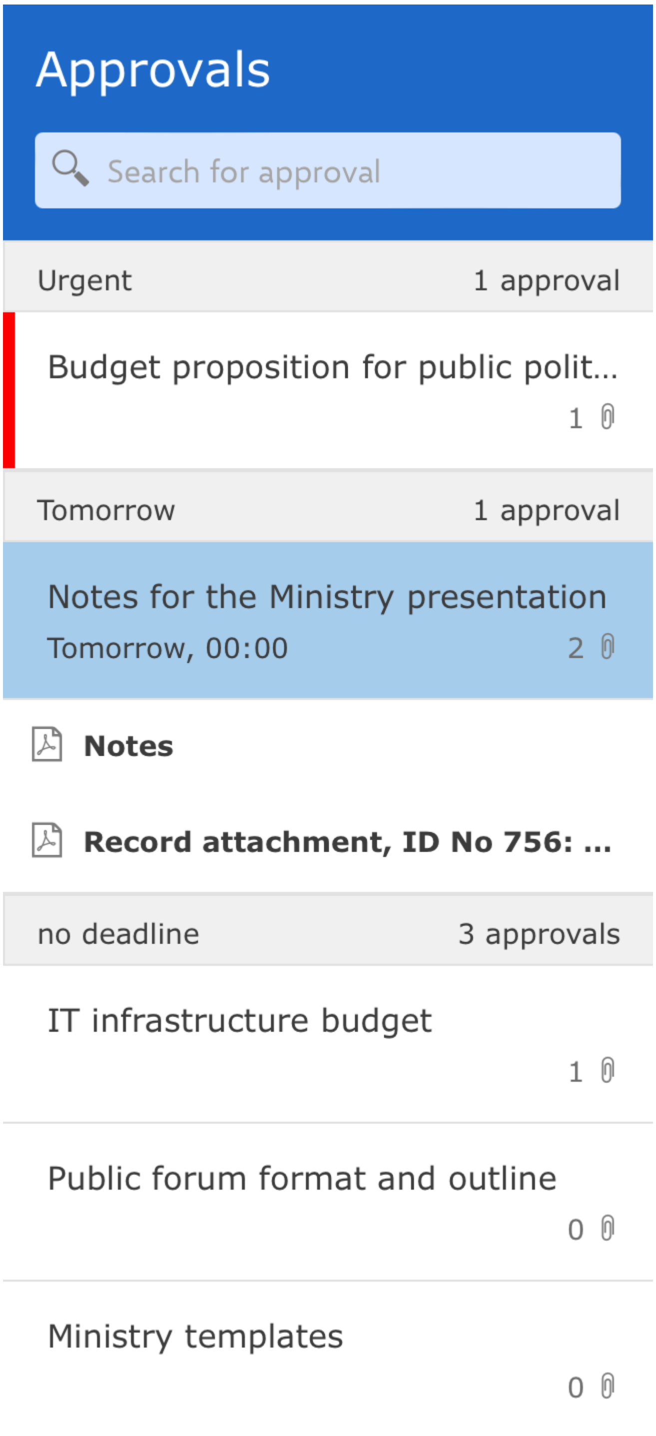


Figure 40. The approvals list

Approvals marked "Urgent" are placed at the top of the list. Approvals without a deadline are placed at the bottom of the list. Approvals that are both marked "Urgent" and have a deadline are placed in the "Urgent" group.

NOTE If the user is a gated approver, the gatekeeper is able to edit the order in which the approvals appear.

Search for approvals

You can search for approvals using the search field above the approvals list. You search by the title of the approval.

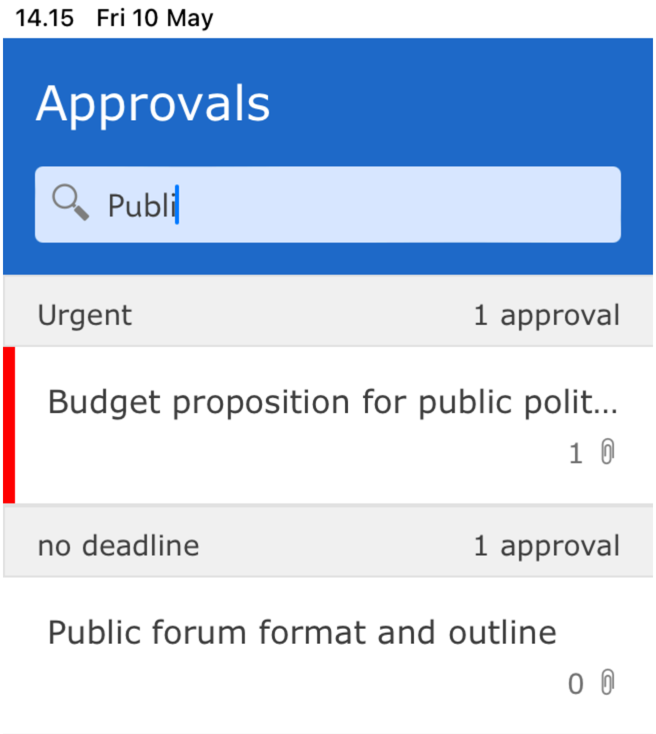


Figure 41. Search for approvals

Approvals ribbon functions

The ribbon above the preview contains menu items for working with the approval.

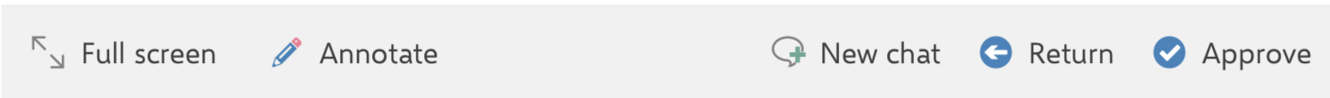


Figure 42. Functions in the approvals ribbon

When the ribbon is shortened, the menu items are gathered in the "More" drop-down menu.

The functions are as follows:

Function	Description
"Full screen"	Display the selected content on the entire screen.
"Split screen"	Restore the default view.
"Annotate"	Open the selected document in annotation mode.
"Hide annotations"/"Show annotations"	Toggle annotation visibility in the selected document. The menu item is only visible for annotated documents.
"New chat"	Create a new chat on the approval.
"Return"	Open a dialogue where you can return the approval to a previous step.
"Approve"	Open a dialogue where you can grant approval.

Read and annotate approval

You can read and annotate approvals on F2 Manager 2 before processing them. You can:

- Read through the approval and its attached documents.
- Annotate the approval and its attached documents.

Read through approvals and their documents

When you tap an approval in the list on the left, its approval document opens in the preview on the right, and the list of its attached documents is expanded. The number of documents attached to an approval is shown next to the attachment icon on the item. Unread documents are bolded in the list.

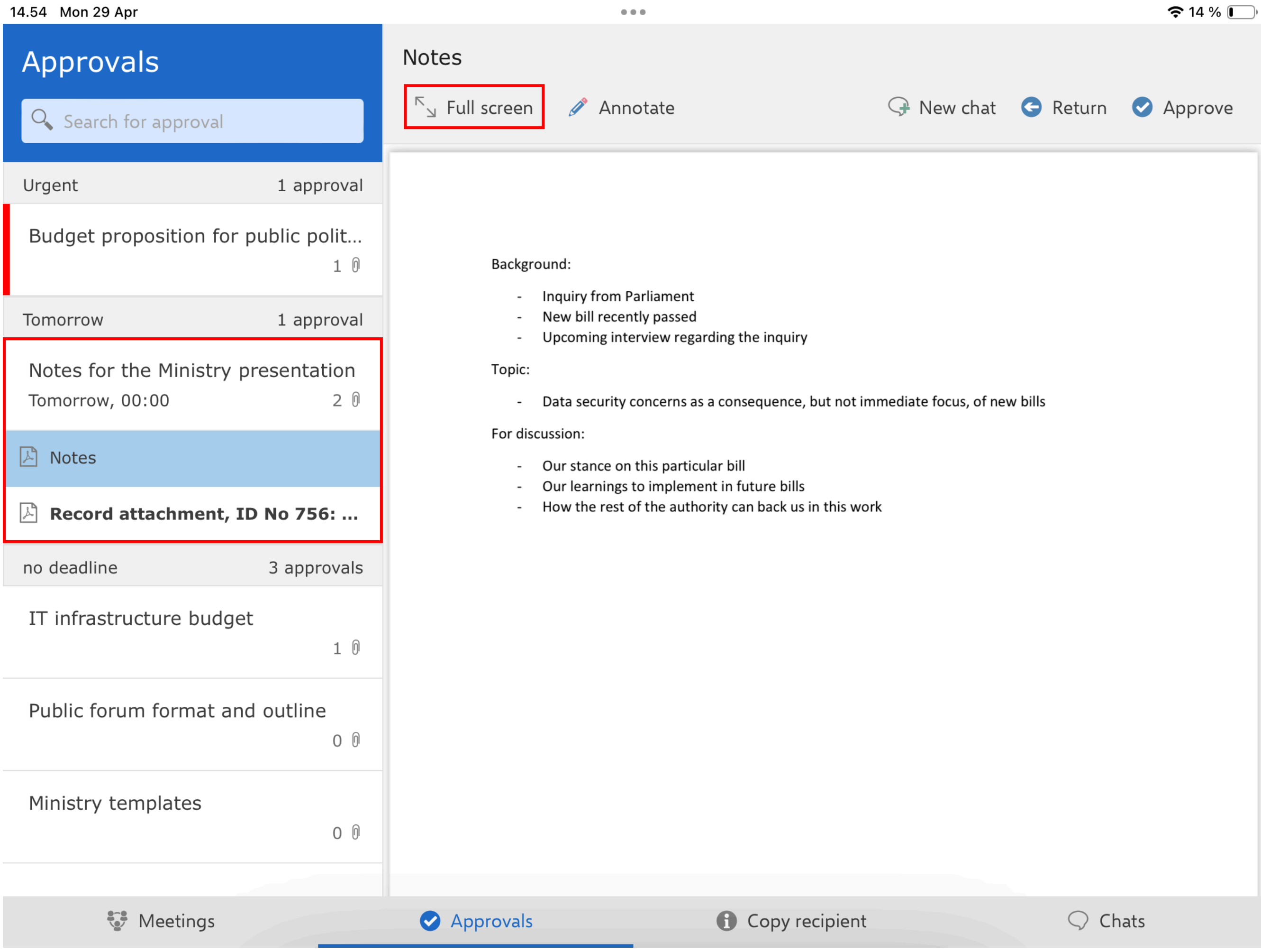


Figure 43. Read approval

Tap an attached document to preview it on the right.

Tap **Full screen** in the ribbon to display the selected document on the whole screen. Tap **Split screen** to restore the approval view.

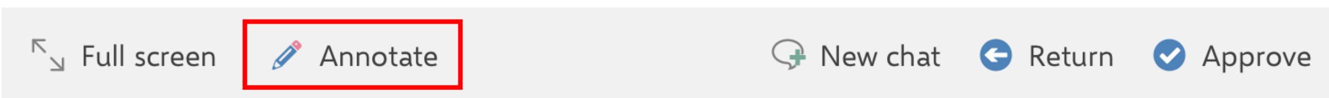
The approval document

By default, the approval document is a comprehensive document containing:

- Approval metadata.
- The actual approval document.
- Record information including relevant record metadata.
- The record document of the approval record.

Annotate documents

You can annotate the approval document and the approval's attached documents. Tap the relevant document in the approvals list, and then tap **Annotate** in the ribbon to open the selected document in annotation mode.



In annotation mode the annotation toolbox is placed at the bottom of the screen by default. You can move the toolbox by tapping it and dragging it to the desired location. F2 Manager 2 remembers where you placed the toolbox next time you open a document in annotation mode.

Tap the desired tool to start using it. Read more about annotation tools in Apple's online documentation.

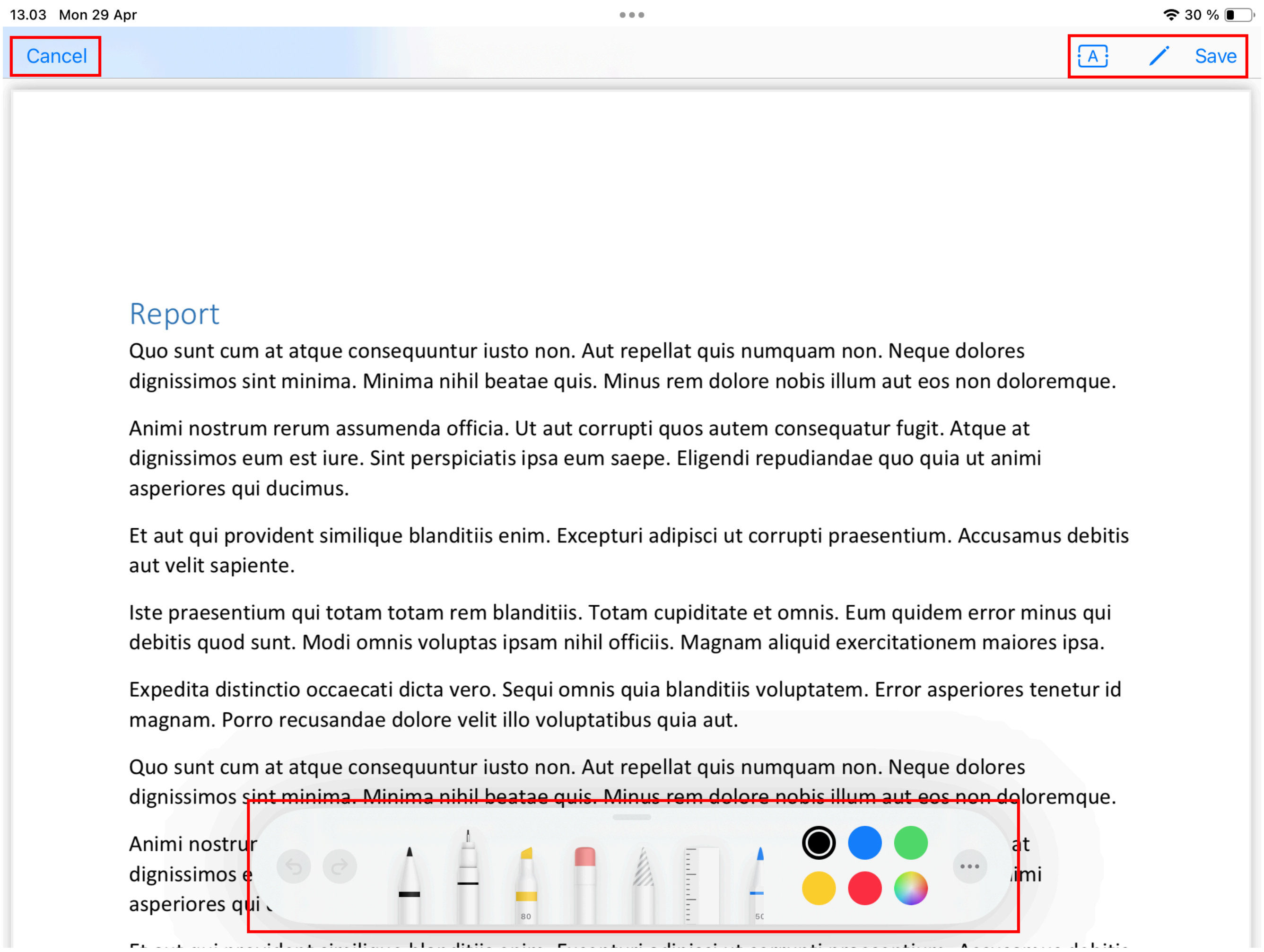


Figure 45. A document in annotation mode

Tap **Discard** in the upper toolbar to undo your recent annotations and return to the approvals list.

Tap **Save** in the upper toolbar to save your latest annotations and return to the approvals list.

The annotated document is saved as a PDF file on the approval on both F2 Manager 2 and in F2 Desktop. When you reopen the document on F2 Manager 2, you can choose to view the PDF file with your annotations or you can choose to hide the annotations and view the original document.

WARNING	If changes have been made to the original document after you annotated it, e.g. another user has updated the document in F2 Desktop, you may end up overwriting your original annotations if you annotate the new version of the original document.

The PDF file with the annotations can be accessed from F2 Desktop by all approvers on the approval. The filename for the PDF will be "[Original title] (annotated by [username])" as in the example below.

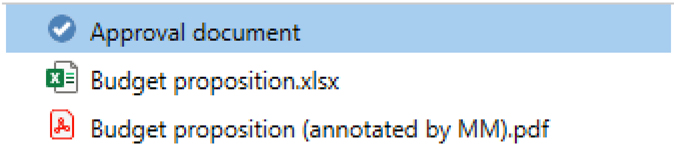


Figure 46. The annotated document as a PDF file in F2 Desktop

A pencil icon in the approvals list indicates that the document has been annotated.

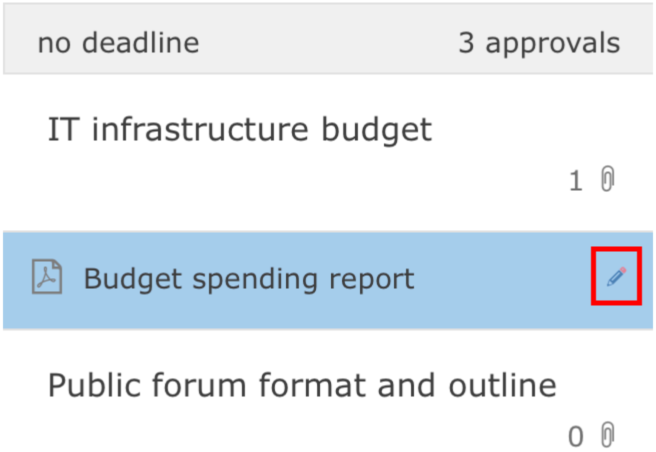


Figure 47. A pencil icon indicates annotations in F2 Manager 2

NOTE An approval can only contain one F2 Manager 2 PDF. This means that an annotation risks being overwritten if more than one user makes annotations on F2 Manager. The PDF file name always indicates the first annotating user, but not any subsequent users.

Toggle annotation visibility

You can hide your saved annotations. Tap **Hide annotations** in the ribbon above the preview to see the original document without your annotations.

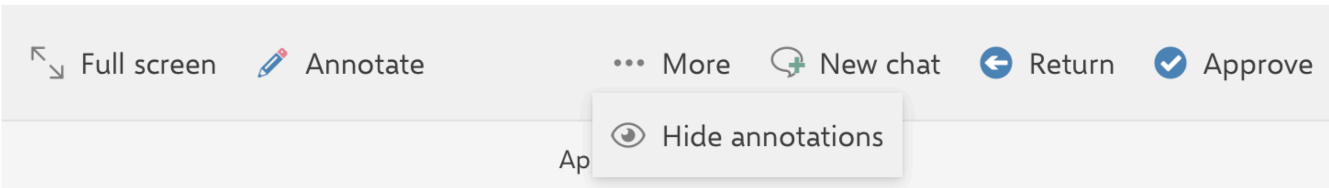


Figure 48. Hide annotations

Tap **Show annotations** to view your annotations again.

Process approval

You can process approvals on F2 Manager 2 by returning them or granting approval.

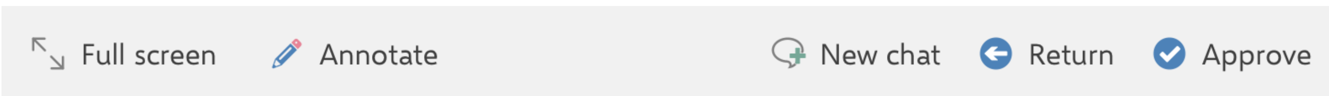


Figure 49. Approval processing options

NOTE When you process an approval as a gated approver, your gatekeeper may apply or adjust your decision to either return or approve before the approval is sent to the relevant approval step. Read more about F2 Gateway Approvals.

Return approval

Tap **Return** on the ribbon to return the selected approval to a previous approval step. A dialogue opens where you choose who the approval should be returned to and where you recommend resuming the approval. You can write a comment detailing why you are returning the approval.

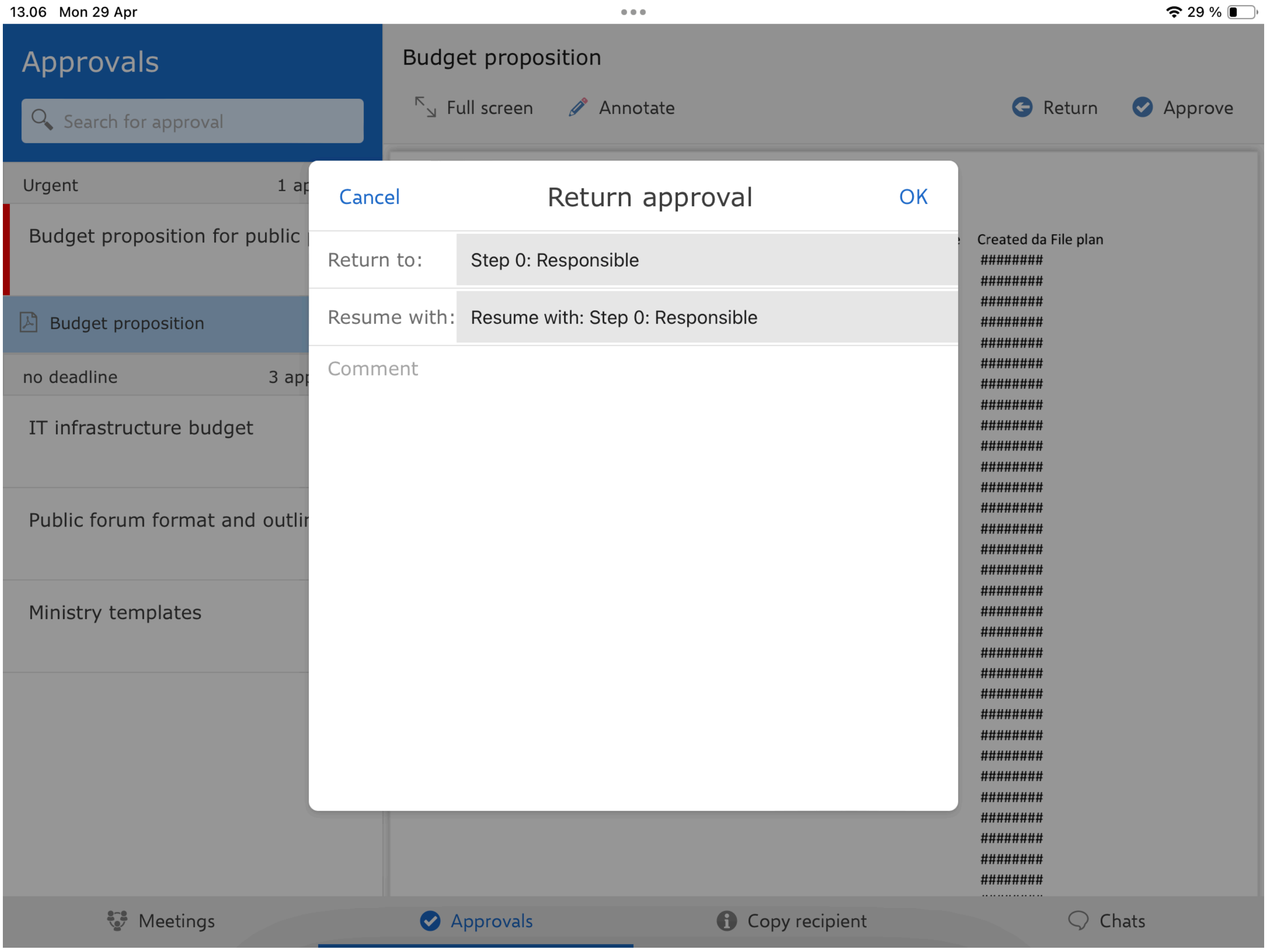


Figure 50. Return approval

Tap **OK** to return the approval to the selected approval step.

Tap **Undo** if you do not wish to return the approval.

Read more about returning approvals.

Grant approval

Tap **Approve** in the ribbon to approve the selected approval. A dialogue opens where you can add a comment before approving.

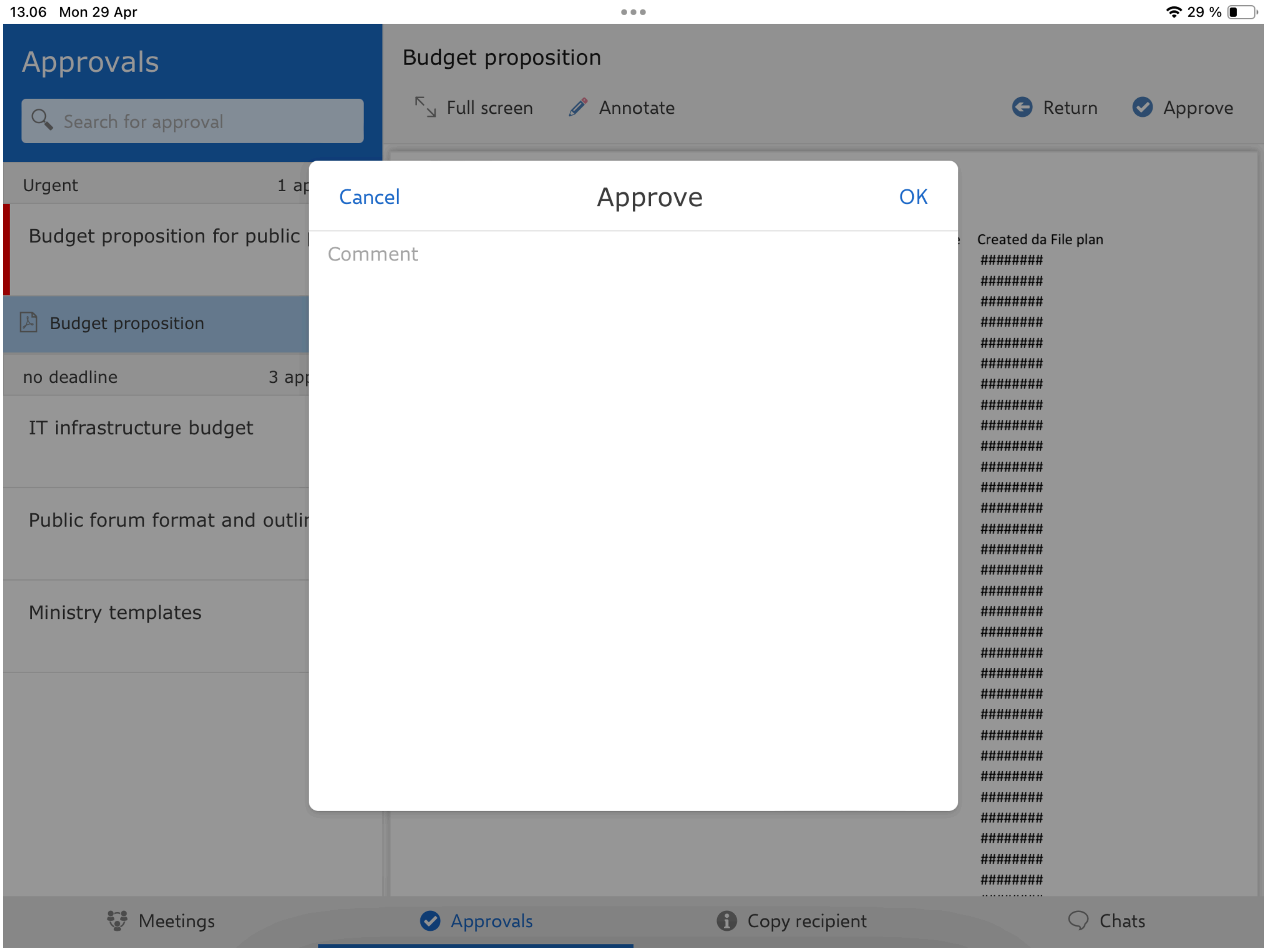


Figure 51. Grant approval

Tap **OK** to grant approval. The approval will move on to the next step or be approved finally if you are the last approver.

Tap **Cancel** if you do not wish to grant approval.

Read more about processing approvals.

Chat from an approval

You can chat on approvals from F2 Manager 2. If there is a chat on an approval, it will be displayed on the "Chat" tab above the preview of the approval document. From the ribbon, you can create a new chat.

You might receive chats on approvals where you are not an approver. These chats will only be available through the "Chats" section of the chats list. The approvals will not show in the approvals list.

You have a complete overview of all your chats on F2 Manager 2 in the chats list.

Create a new chat on an approval

Tap **New chat** in the ribbon to create a chat on the selected approval.

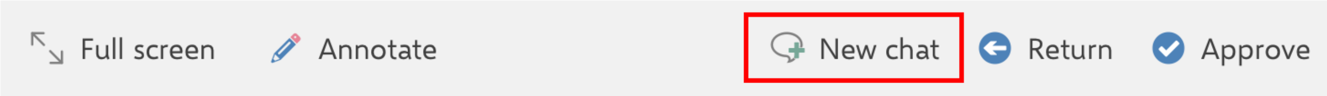


Figure 52. Create chat on an approval

A dialogue opens where you can add chat participants. F2 Manager 2 suggests your most frequently used chat participants. When you start typing in the "Search for chat participants" field, F2 Manager 2 searches for users in F2's participant register. You can add multiple chat participants at once.

When you have added your desired participants, tap **OK** to create the chat. Tap **Cancel** if you do not wish to create the chat.

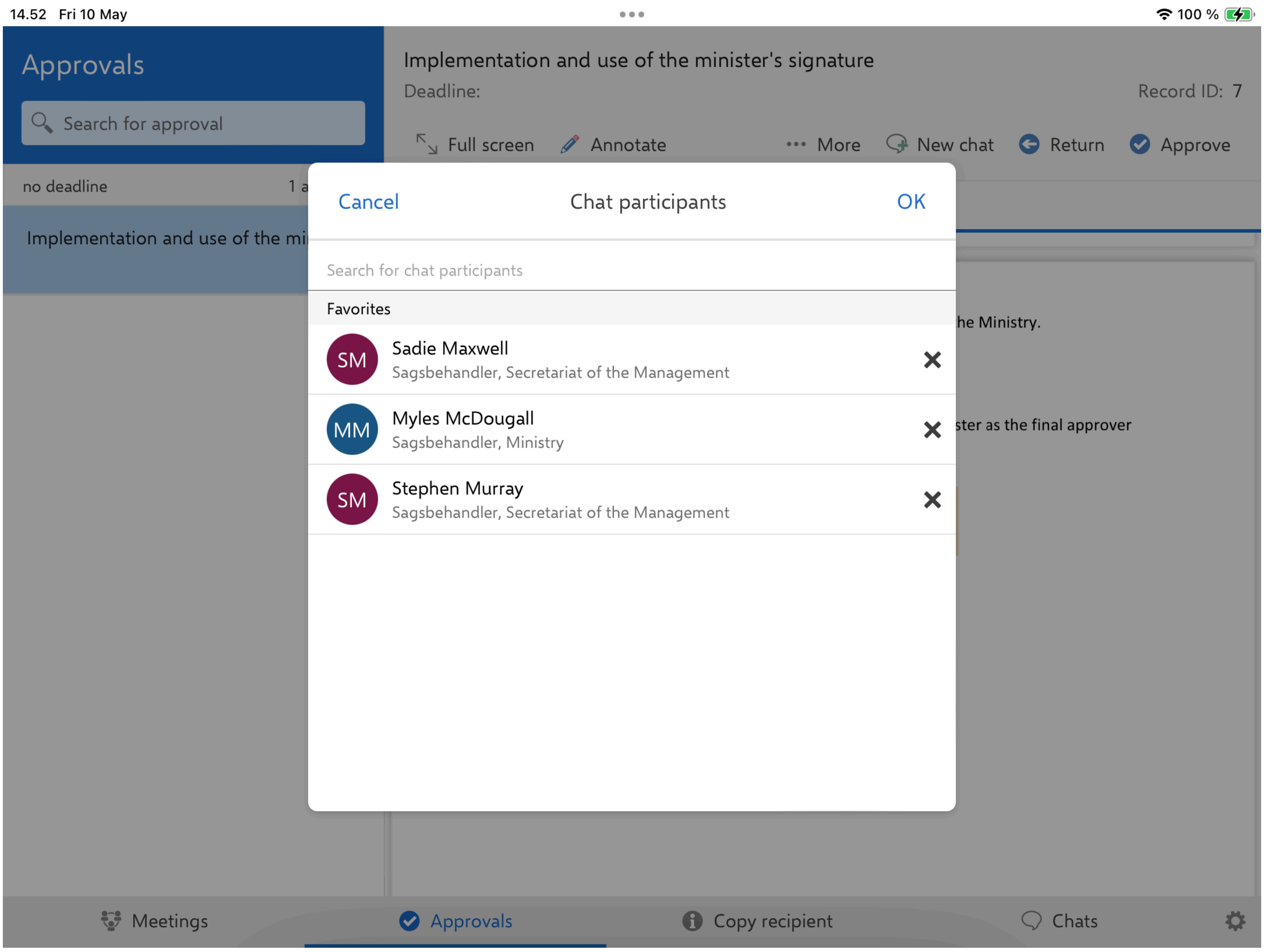


Figure 53. Add chat participants

After you tap **OK**, the chat window opens.

Your selected chat participants are displayed at the top of the chat window. You can write your message in the compose box at the bottom. Tap the **send chat icon** to send your message.

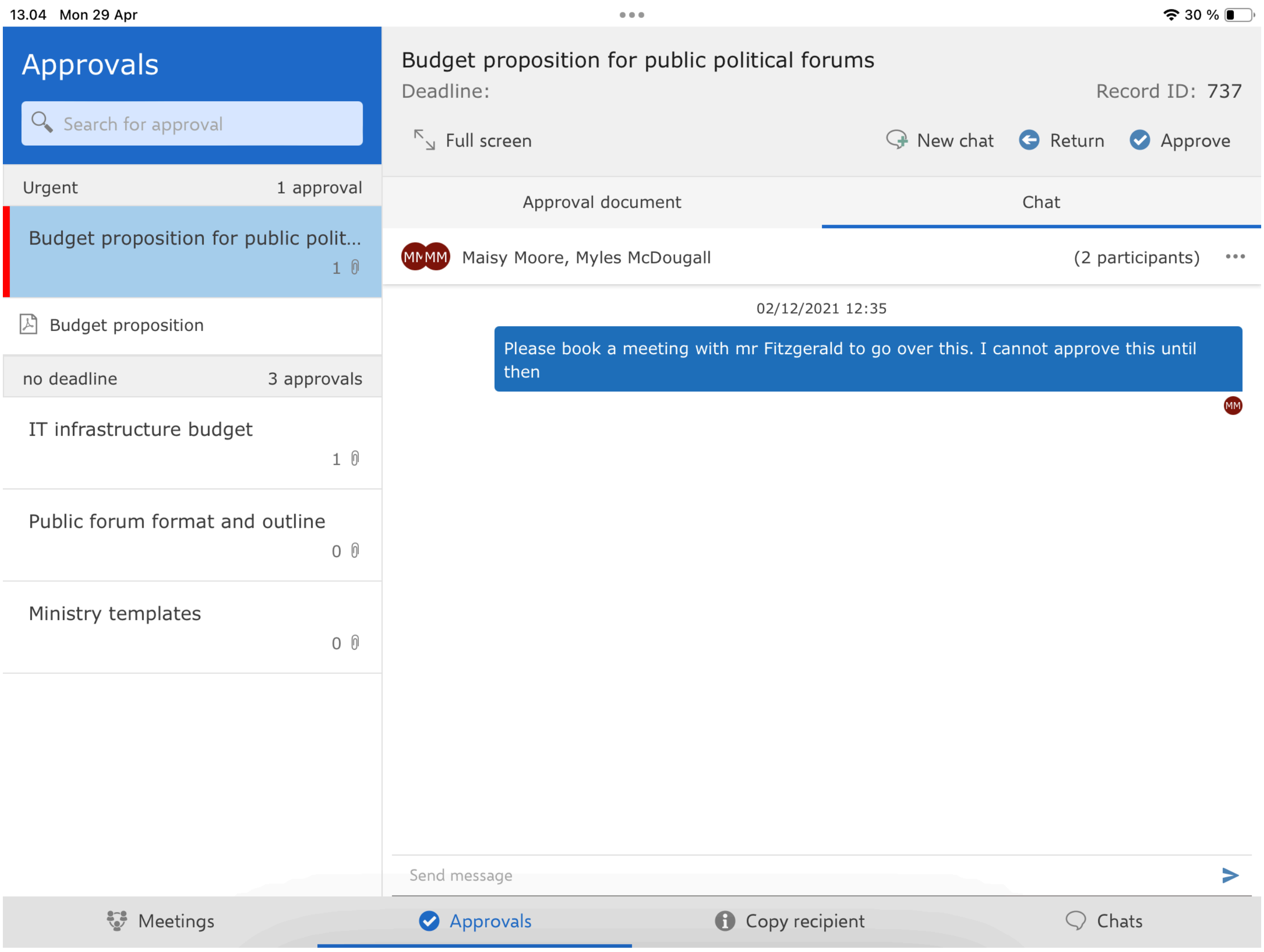


Figure 54. The chat window

The chat is also available on the chats list.

View chats on an approval

When there is one or more chats on an approval, the "Chat" tab will be displayed above its preview. If there is an unread chat on a item, the "Chat" tab will be bolded for the given item, and the chat itself will also be bolded.

Tap a chat to open the chat window.

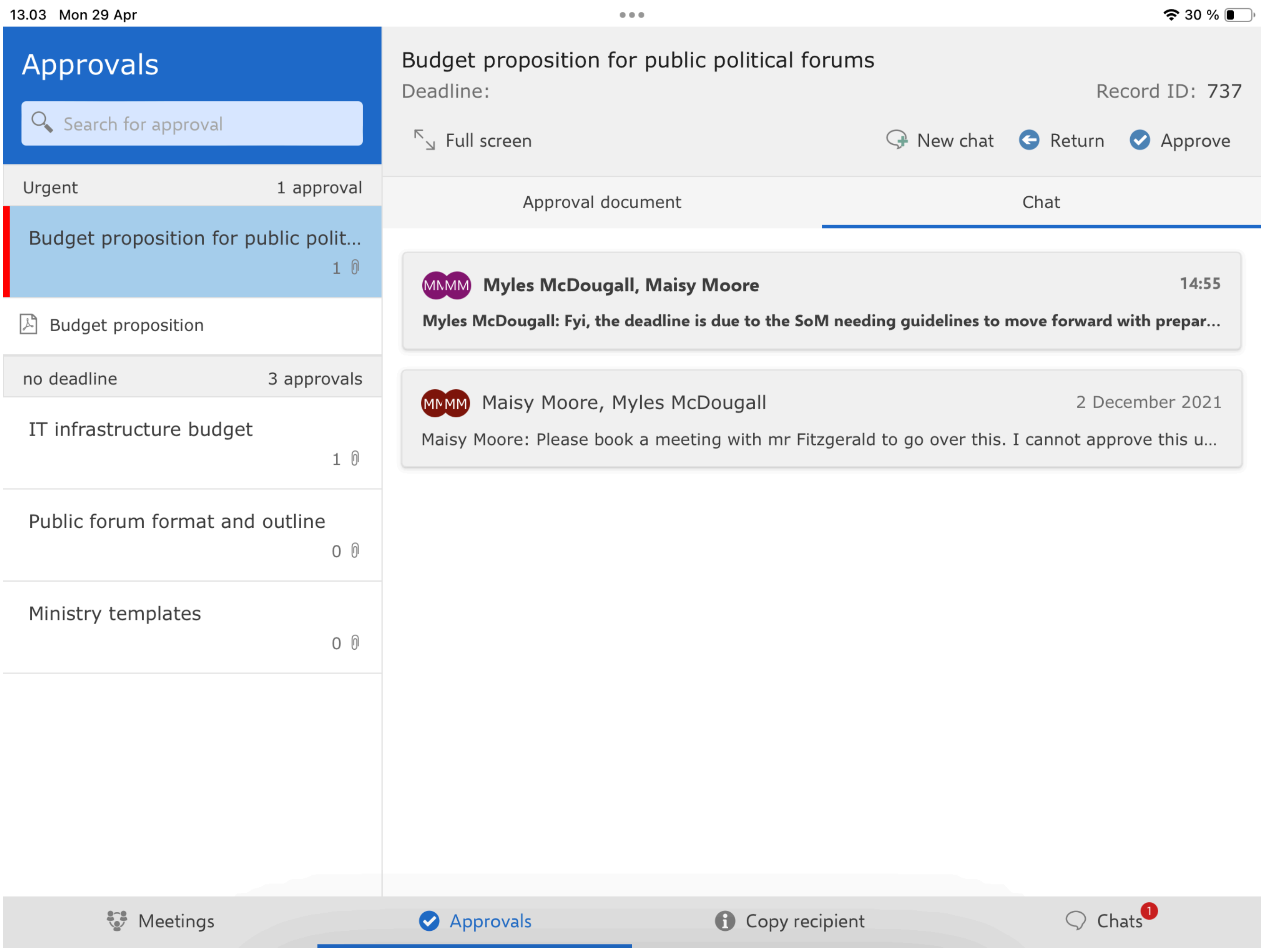


Figure 55. Chats overview on an approval

Copy recipient in F2 Manager 2

F2 Manager 2 gives you access to active approvals where you are a copy recipient. An approval is transferred to F2 Manager 2 when it is sent to a step where you are a copy recipient. The approval disappears from F2 Manager 2 when you mark it as read or after 30 days.

Tap **Copy recipient** at the bottom of the ribbon on F2 Manager 2 to display a list of all available approvals.

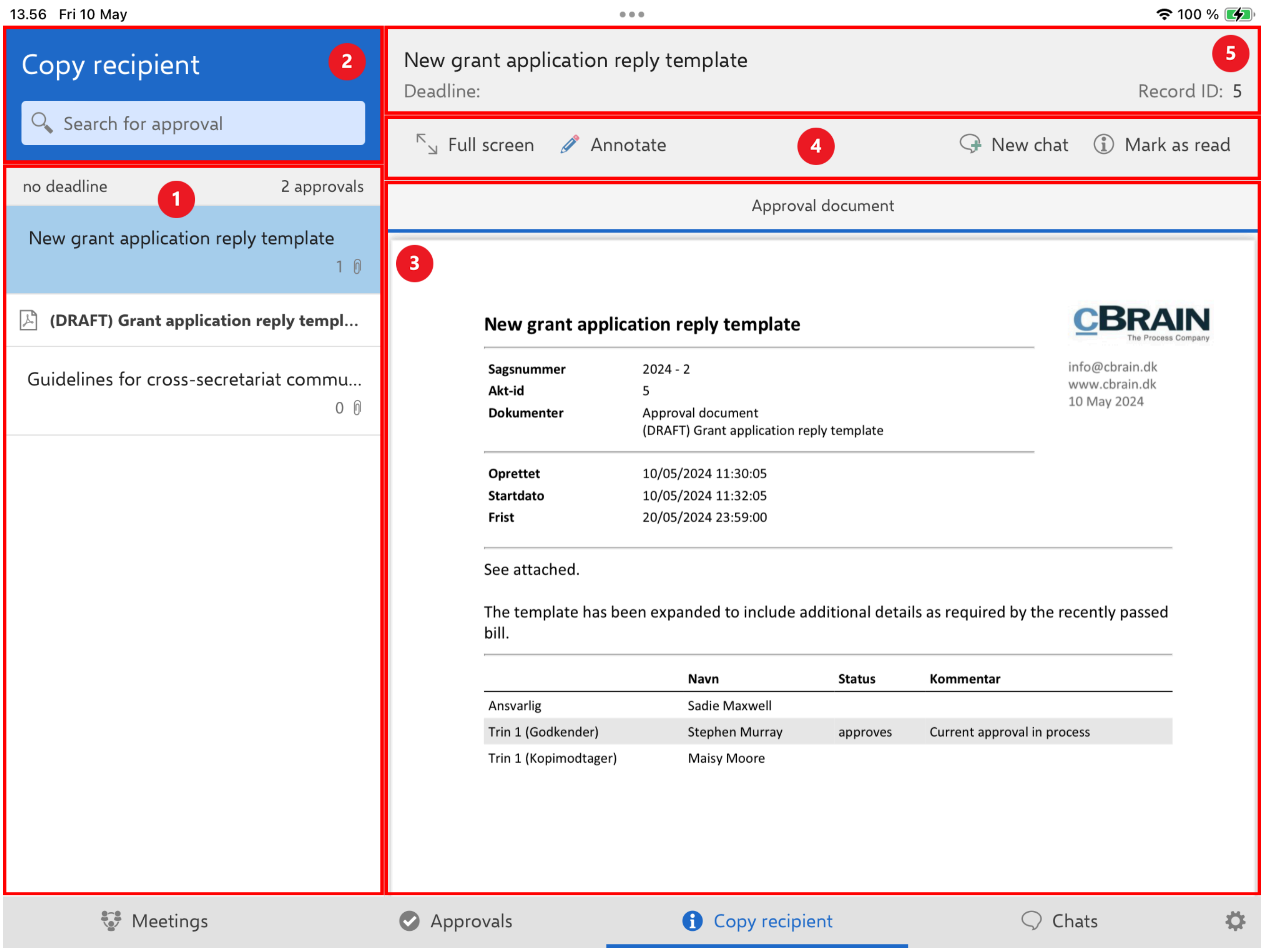


Figure 56. Overview of copy recipient approvals

On the left you can see a list of transferred approvals (1). You can search for approvals using the search field above the list (2). When you tap an approval in the list, the approval document will be displayed in a preview on the right (3). Above the preview are functions for processing the approval (4). Above these functions are the metadata of the selected approval such as title, deadline, and record ID for the record associated with the approval (5).

NOTE	If you are a gated approver, your gatekeeper will select which approvals are transferred to F2 Manager 2. Some approvals may not be transferred to F2 Manager 2 even though you are a copy recipient on the current step of the approval. Read more about the F2 Gateway Approvals add-on.

The approvals list for copy recipients

Approvals are displayed in the approvals list with title, deadline, and the number of attached documents. The list is sorted by approval deadline. If there are multiple approvals with the same deadline, they are grouped. The deadline and the number of approvals in the grouping are shown in the grey band above a group of approvals.

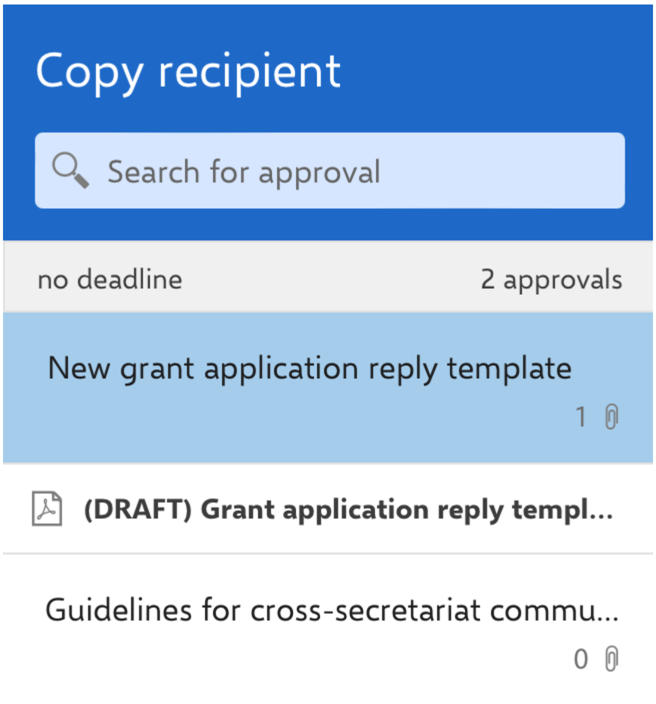


Figure 57. The copy recipient approvals list

Approvals marked "Urgent" are placed at the top of the list. Approvals without a deadline are placed at the bottom of the list. Approvals that are both marked "Urgent" and have a deadline are placed in the "Urgent" group.

Search for approvals

You can search for approvals using the search field above the approvals list. You search by the title of the approval.

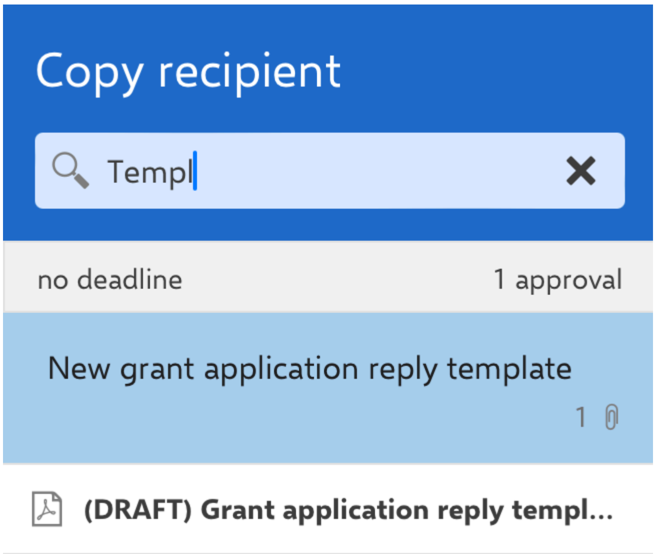


Figure 58. Search for approvals

Copy recipient ribbon functions

The ribbon above the preview contains menu items for working with the approval as a copy recipient.

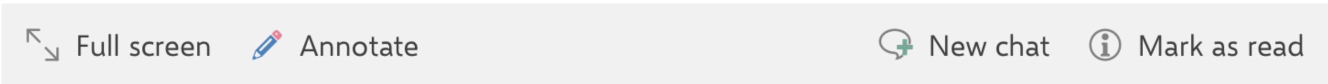


Figure 59. Functions in the copy recipient ribbon

When the ribbon is shortened, the menu items are gathered in the "More" drop-down menu.

The functions are as follows:

Function	Description
"Full screen"	Display the selected content on the entire screen.
"Split screen"	Restore the default view.
"Annotate"	Open the selected document in annotation mode.
"Hide annotations"/"Show annotations"	Toggle annotation visibility in the selected document. The menu item is only visible for annotated documents.
"New chat"	Create a new chat on the approval.
"Mark as read"	Open a dialogue where you can mark the approval as read.

Read and annotate approval

You can read and annotate approvals on F2 Manager 2 before processing them. As a copy recipient you have the same options as an approver:

- Read through the approval and its attached documents.
- Annotate the approval and its attached documents.

Process approval as a copy recipient

You can process approvals on F2 Manager 2 as a copy recipient by commenting and marking the approval as read.

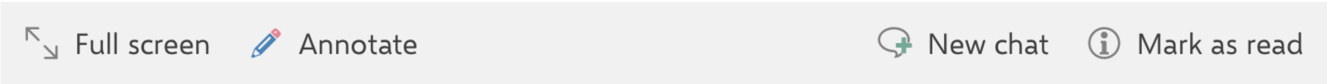


Figure 60. Copy recipient processing options

NOTE	When you process an approval as a copy recipient and gated approver, your gatekeeper may apply or adjust your comment or decision to mark it as read before the approval is sent to the relevant approval step. Read more about F2 Gateway Approvals.

Tap **Mark as read** in the ribbon to mark the selected approval as read. A dialogue opens where you can add a comment.

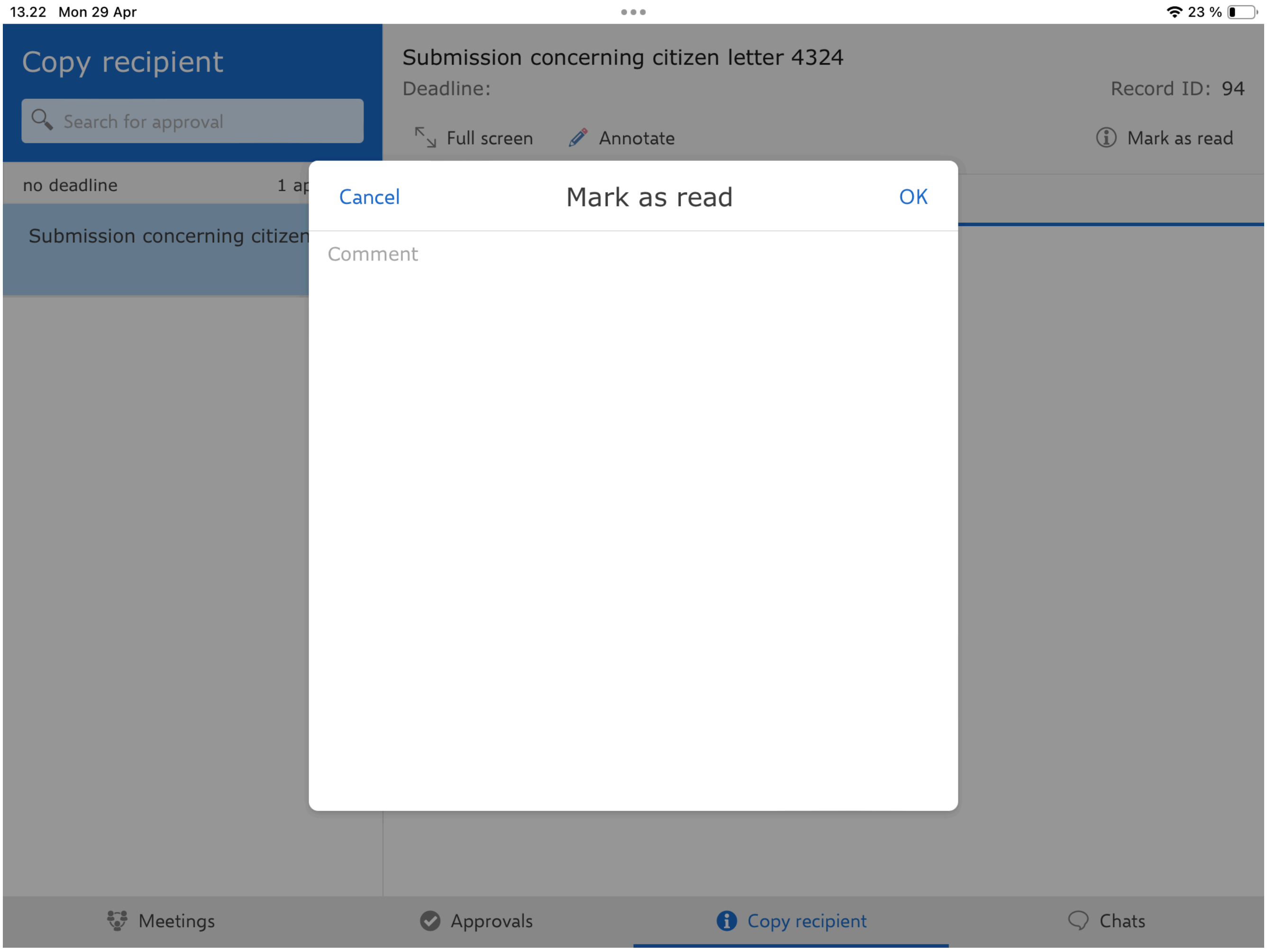


Figure 61. Mark approval as read

Tap **OK** to mark the approval as read.

Tap **Cancel** if you do not wish to mark the approval as read.

Chat from an approval as a copy recipient

You can chat from approvals where you are a copy recipient on the current step.

Read more about chatting from approvals.

Chats in F2 Manager 2

You can chat on F2 Manager 2 from approvals and meeting agenda items. You can also recieve and reply to chats on approvals where you aren’t an approver.

Tap **Chats** at the bottom of the ribbon on F2 Manager 2 to display a list of all your chats.

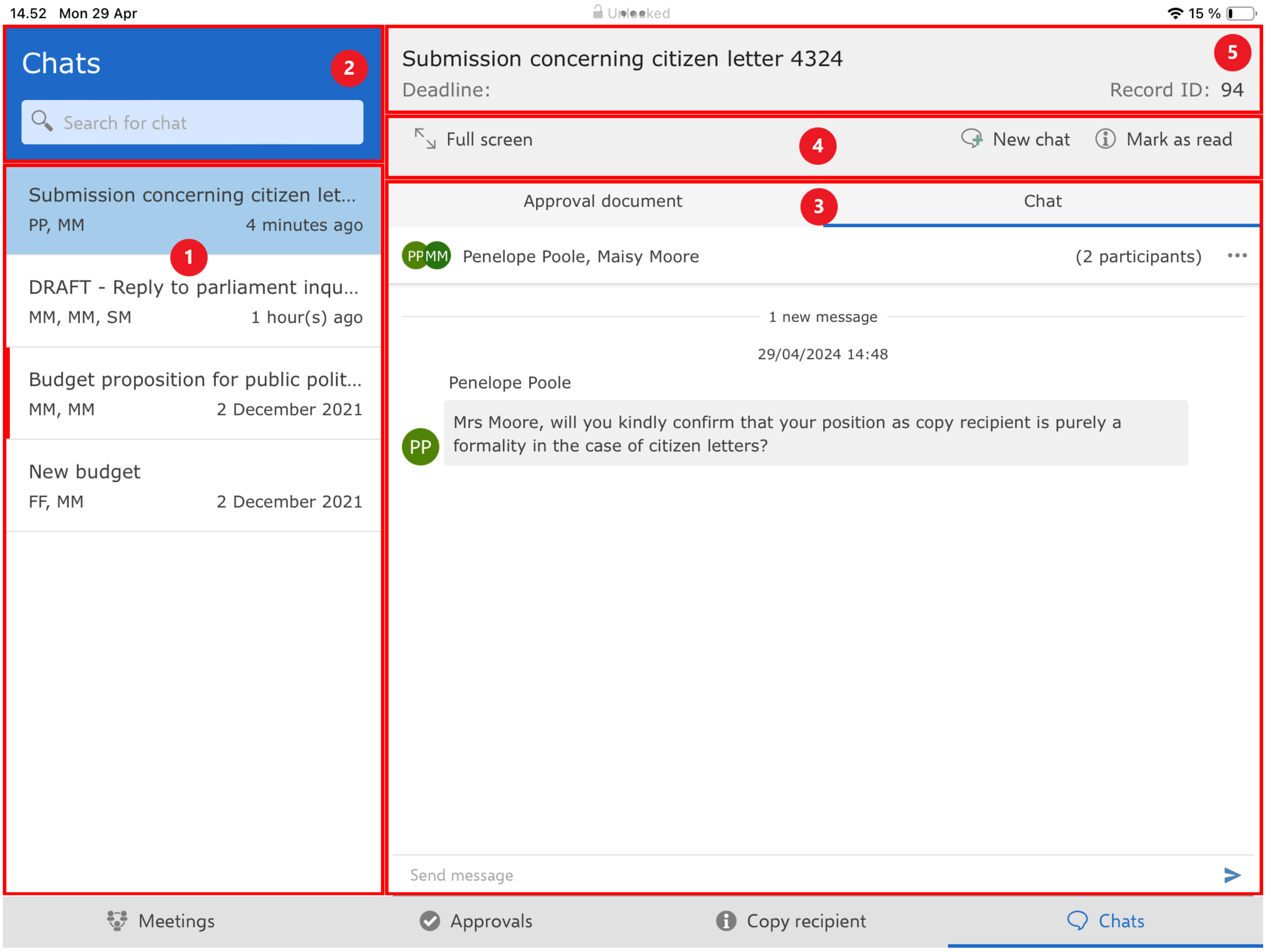


Figure 62. Overview of chats

On the left you can see a list of chats (1). You can search for chats using the search field above the list (2). When you tap a chat in the list, the chat window will be displayed in a preview on the right (3). Above the preview are functions for working with the agenda item or approval associated with the chat (4). Above these functions are the metadata of the approval - title, deadline, and ID of the approval record - or agenda item - record title and meeting title (5).

The chats list

Chats are displayed in the chats list with agenda item or approval title, the initials of the chat participants, and the time of the latest chat entry. The list is sorted chronologically by their last entry. This places the newest chats at the top of the list. Multiple chats on the same agenda item or approval are listed individually. Unread chats are bolded.

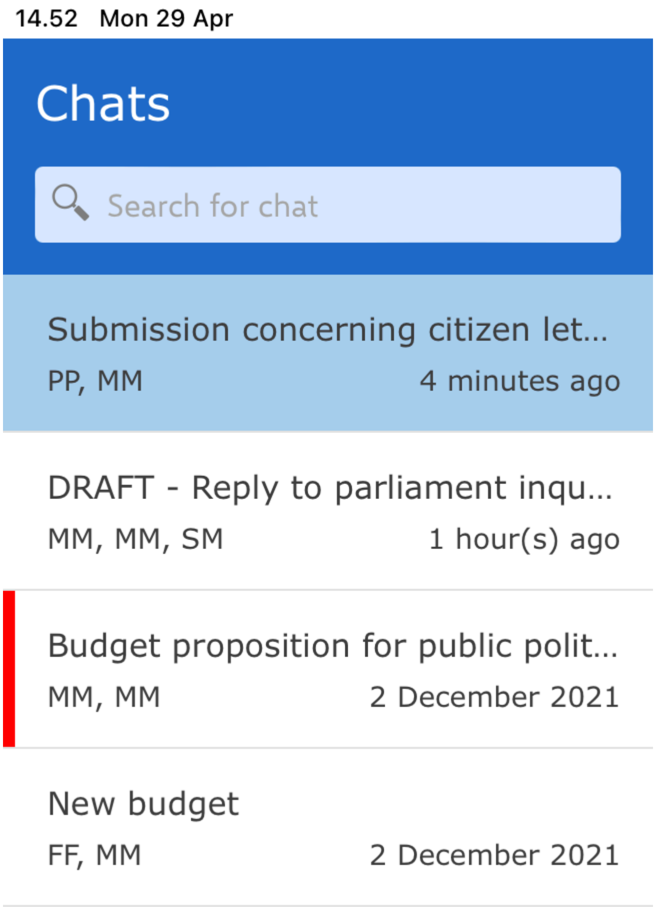


Figure 63. The chats list

You can also create new chats on any agenda item or approval already present in the chats list.

Chats are removed from the list

Chats are removed from the chats list, either when you do it manually, or when their associated agenda item or approval is no longer on F2 Manager 2.

Type of chat	Time of removal
Chats on approvals where you are an approver or copy recipient	The chat is removed from the chats list upon final approval. If you have processed the approval, you still have access to its chats until final approval has been granted. You can choose to remove the chat manually by tapping **Remove chat** in the ribbon above the preview.
Chats on other approvals	The chat is removed from the chats list upon final approval or when you remove the chat manually by tapping **Remove chat** in the ribbon above the preview.
Chats on agenda items	The chat is removed from the chats list when the meeting is no longer synchronised to F2 Manager 2.

Search for chats

You can search for chats using the search field above the chats list. You search by the titles of agenda items and approvals.

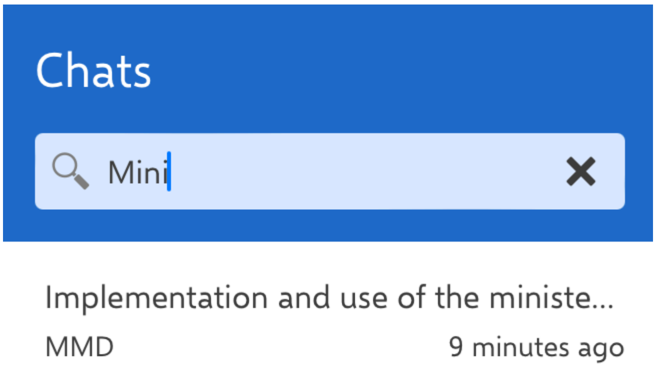


Figure 64. Search for chats

Chats ribbon functions

The ribbon above the preview changes depending on whether you have selected a chat on an agenda item or a chat on an approval.

Functions in context of approvals

The menu items of the ribbon support approval processing when you select a chat on an approval.

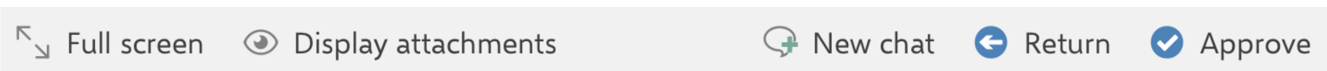


Figure 65. Functions in the chats ribbon for approvals

The functions are as follows:

Function	Description
"Full screen"	Display the selected content on the entire screen.
"Split screen"	Restore the default view.
"Display attachments"	Display documents attached to the approval in the chats list. Tap a document to preview it.
"Hide attachments"	Hide documents attached to the approval in the chats list.
"Annotate"	Open the selected document in annotation mode. The menu item is only visible if you have selected either an approval document or an attached document.
"Hide annotations"/"Show annotations"	Toggle annotation visibility in the selected document. The menu item is only visible for annotated documents.
"Remove chat"	Remove the selected chat from F2 Manager 2. The chat can still be accessed in F2 Desktop. The menu item is only visible if you are not an approver on the approval or the approval is at a different step than yours.
"New chat"	Create a new chat on the approval.
"Return"	Open a dialogue where you can return the approval to a previous step.
"Approve"	Open a dialogue where you can grant approval.

Functions in the context of agenda items

The menu items of the ribbon support working with agenda items when you select a chat on an agenda item.

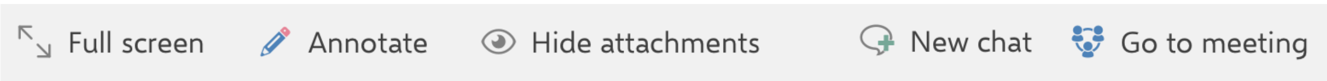


Figure 66. Functions in the chats ribbon for agenda items

When the ribbon is shortened, the menu items are gathered in the "More" drop-down menu.

The functions are as follows:

Function	Description
"Full screen"	Display the selected content on the entire screen.
"Split screen"	Restore the default view.
"Display attachments"	Display documents attached to the approval in the chats list. Tap a document to preview it.
"Hide attachments"	Hide documents attached to the approval in the chats list.
"Annotate"	Open the selected document in annotation mode.
"Hide annotations"/"Show annotations"	Toggle annotation visibility in the selected document. The menu item is only visible for annotated documents.
"New chat"	Create a new chat on the agenda item.
"Go to meeting"	Open the meeting associated with the agenda item. The meeting opens in the agenda view showing the selected agenda item.

Create a new chat

You can create new chats on both approvals and agenda items from the chats list. Tap **New chat** in the ribbon above the preview to create a chat on the selected agenda item or approval.

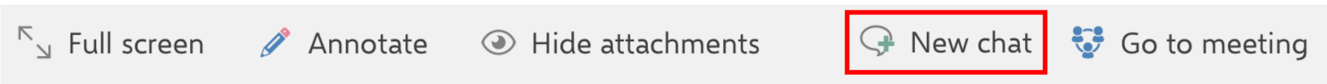


Figure 67. Create a new chat

A dialogue opens where you can add chat participants. F2 Manager 2 suggests your most frequently used chat participants. When you start typing in the "Search for chat participants" field, F2 Manager 2 searches for users in F2’s participant register. You can add multiple chat participants at once.

When you have added your desired participants, tap **OK** to create the chat. Tap **Cancel** if you do not wish to create the chat.

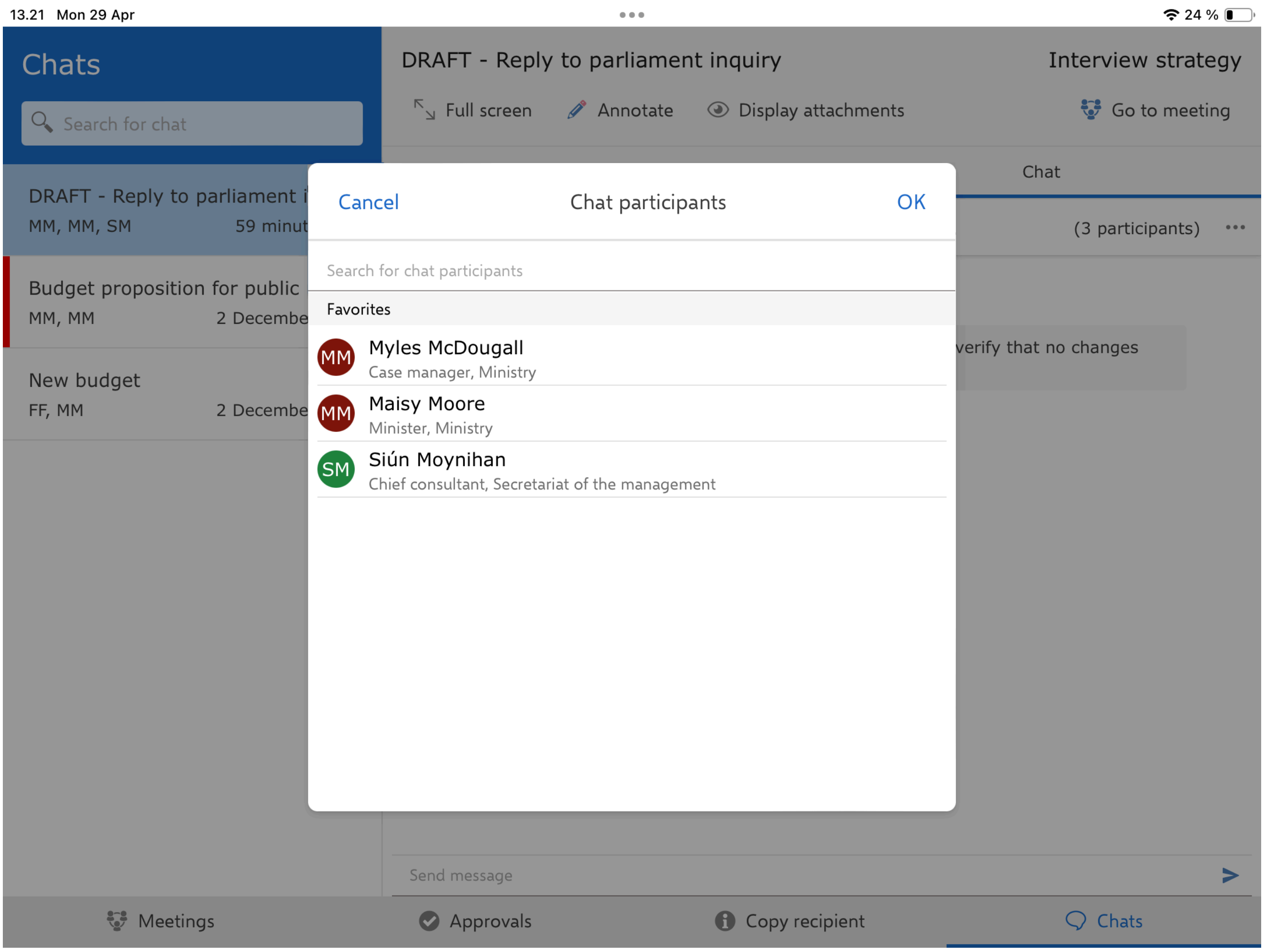


Figure 68. Add chat participants

After you tap **OK**, the chat window opens on the selected agenda item under "Meetings" or the selected approval under "Approvals".

Your selected chat participants are displayed at the top of the chat window. You can write your message in the field at the bottom. Tap the **send chat icon** to send your message.

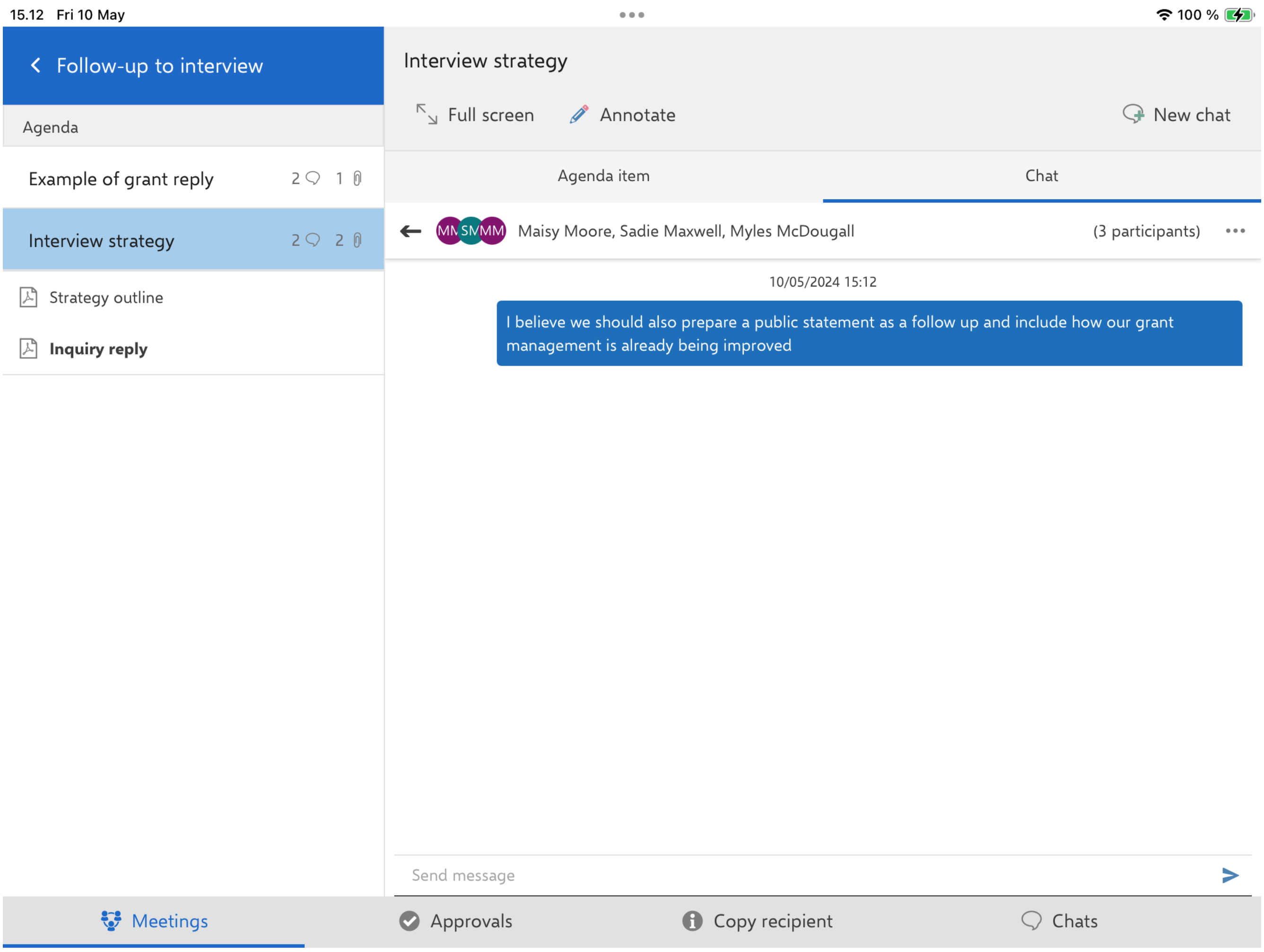


Figure 69. Write a message in the chat window

The chat window

In the chat window, you can read and write chat messages as well as add participants to the chat. Participants are displayed at the top (1). If you tap the **three dots**, the chat participant menu opens where you can view the status of existing chat participants and add or remove participants from the chat.

Write your message at the bottom in the compose box (3). Tap the **send icon** to send your message.

The chat conversation shows which message each chat participant has last read via their picture or initial, which is displayed below said message (4).

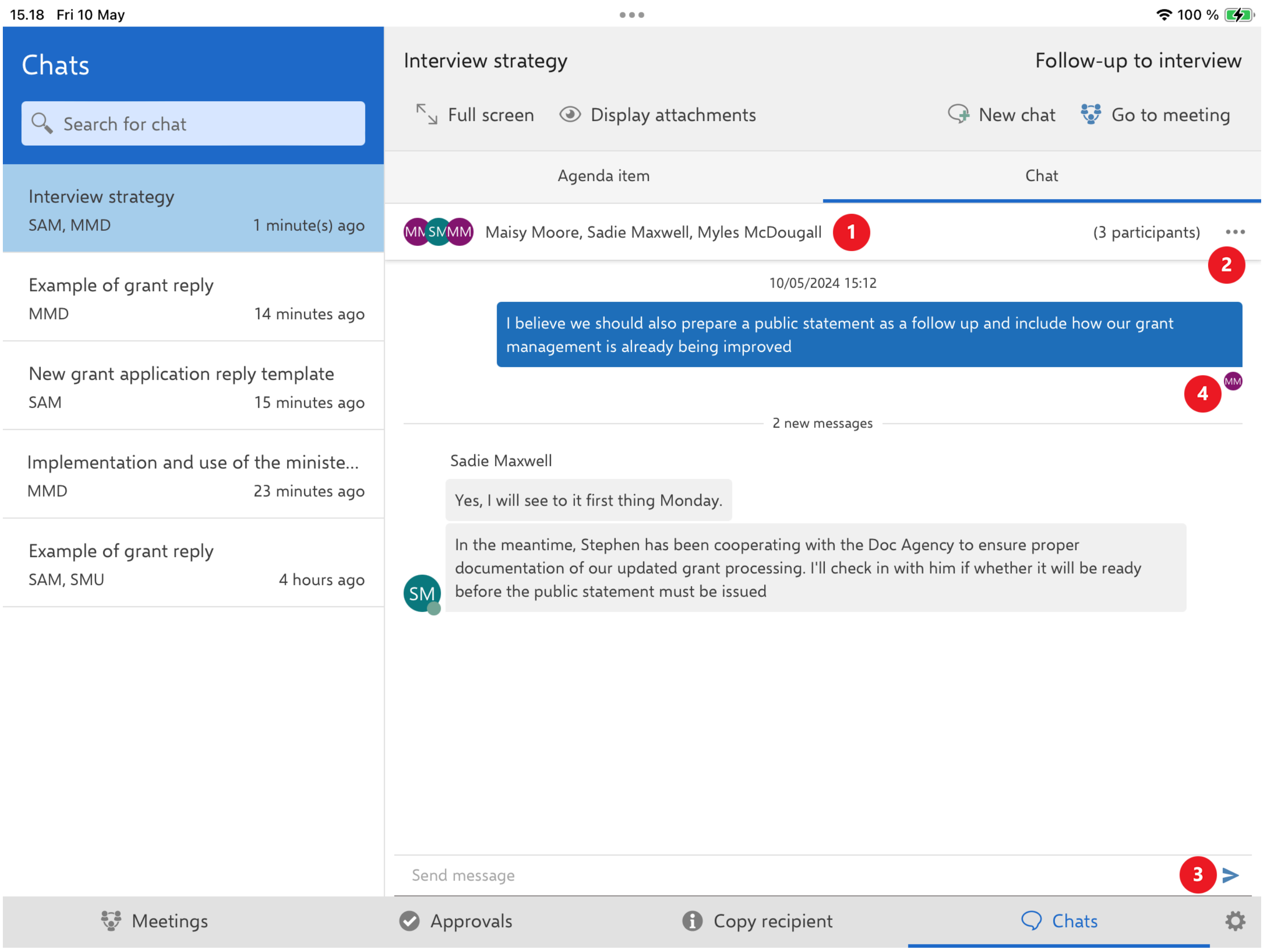


Figure 70. The chat window

If an agenda item or approval holds multiple chats, you can tap the **left arrow** by the participant list to see an overview of the relevant chats.

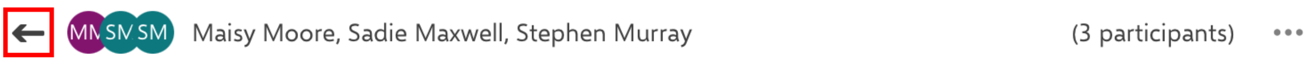


Figure 71. Open the chats overview

Tap a chat in the overview to open it.

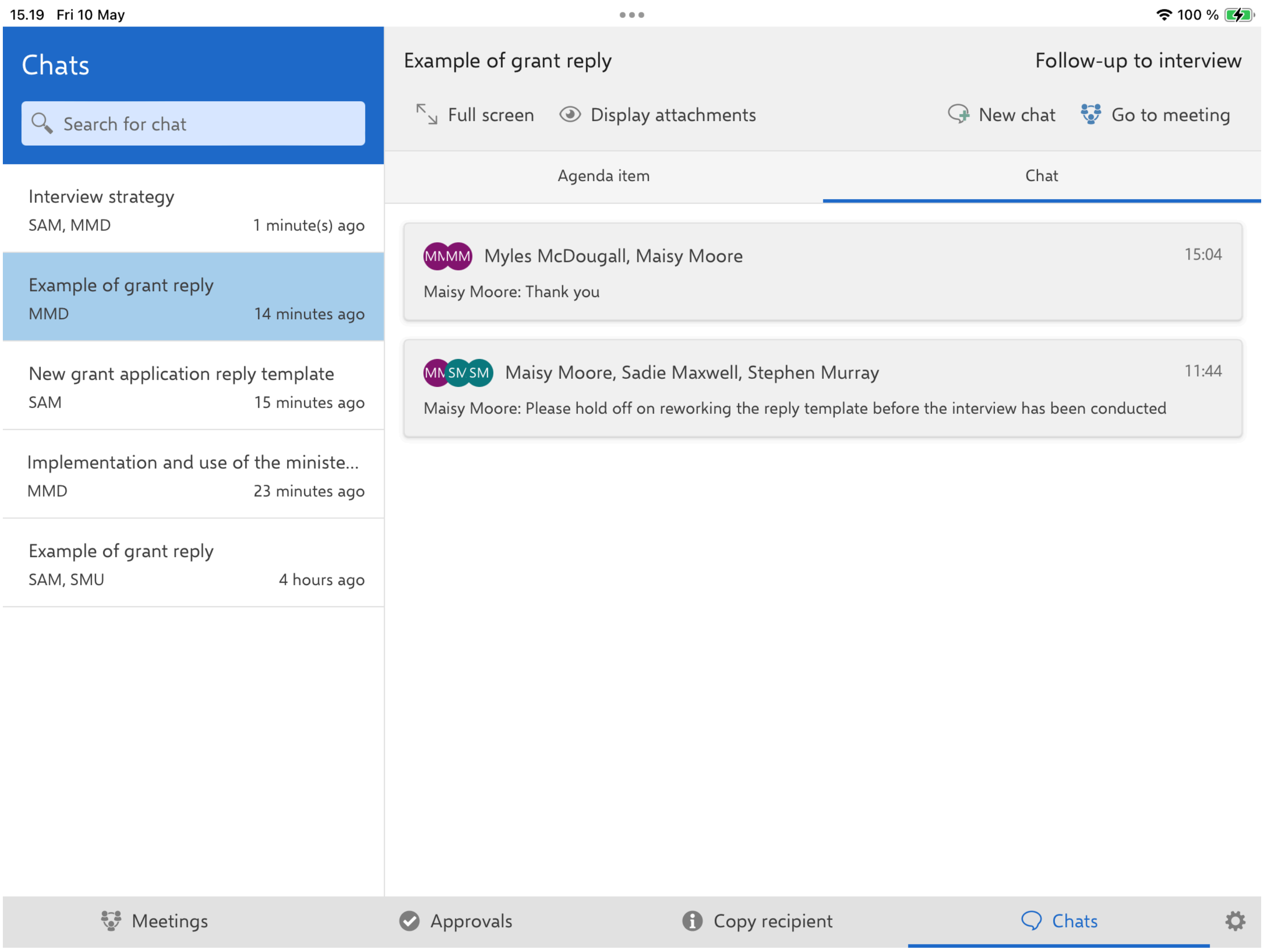


Figure 72. The chats overview on an agenda item

Chat participant menu

Tap the **three dots** next to the participant list in the chat window to open the chat participant menu.

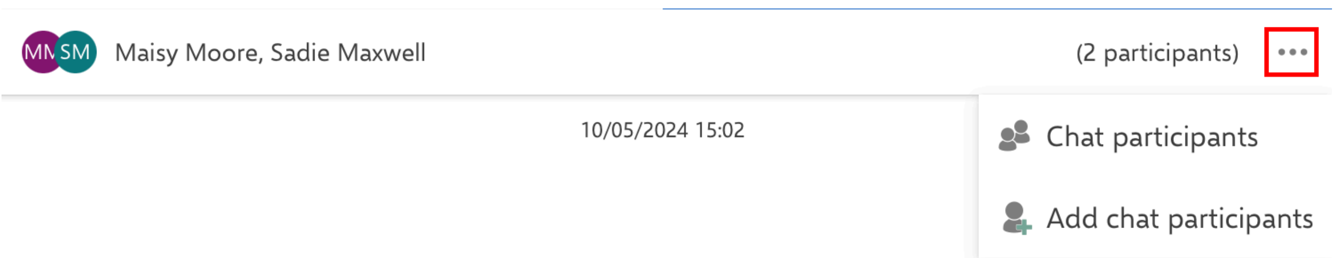
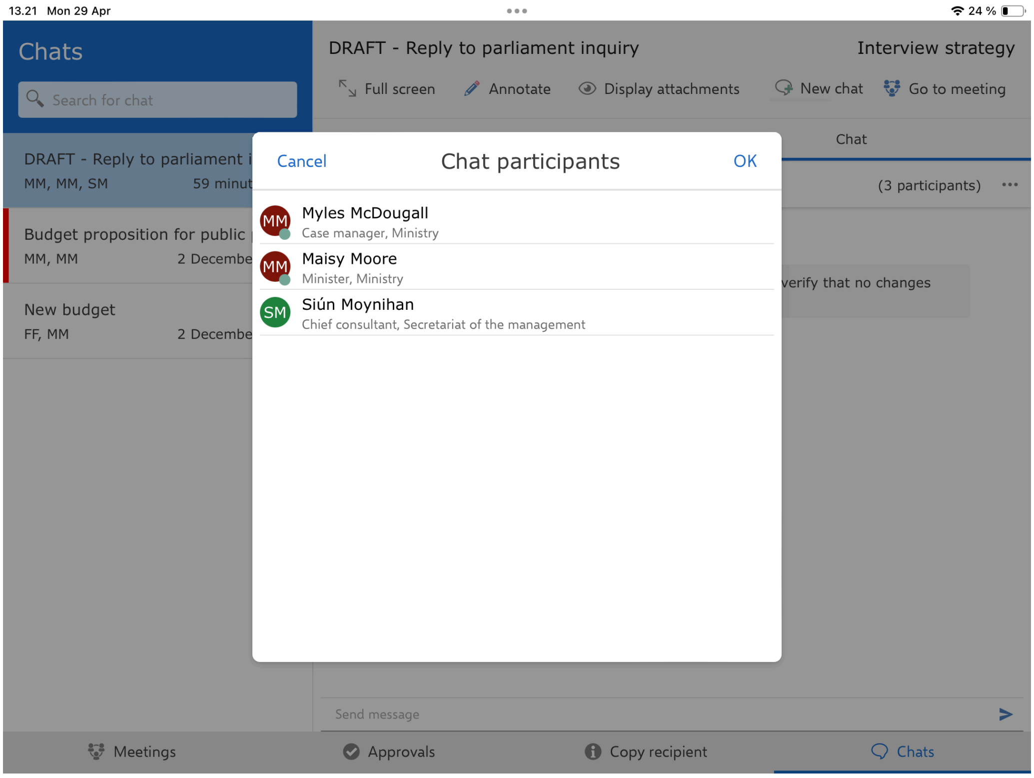


Figure 73. The chat participants menu

The functions are as follows:

Function	Description
"Chat participants"	Open a dialogue with an overview of all chat participants and their status (online, offline, out of office).  *Figure 74. Chat participants' statuses* Remove a chat participant by tapping the **X** next to their name, and then tap **OK** to return to the chat. Tap **Cancel** to return to the chat without removing anyone.

Function	Description
	Figure 75. Add chat participants When you have found your desired participants, tap **OK** to add them to the chat. Tap **Cancel** if you do not wish to add participants.

Access restricted records

If you chat someone who is not included by the access restriction on the agenda item or approval, you will be notified at the top of the screen. Your chat will be saved as a chat draft on said agenda item or approval.

Chat drafts

If you navigate away from a newly created chat without sending a message, the chat will be saved as a draft on the agenda item or approval. You can then find it on the agenda item or approval and in the chats list.

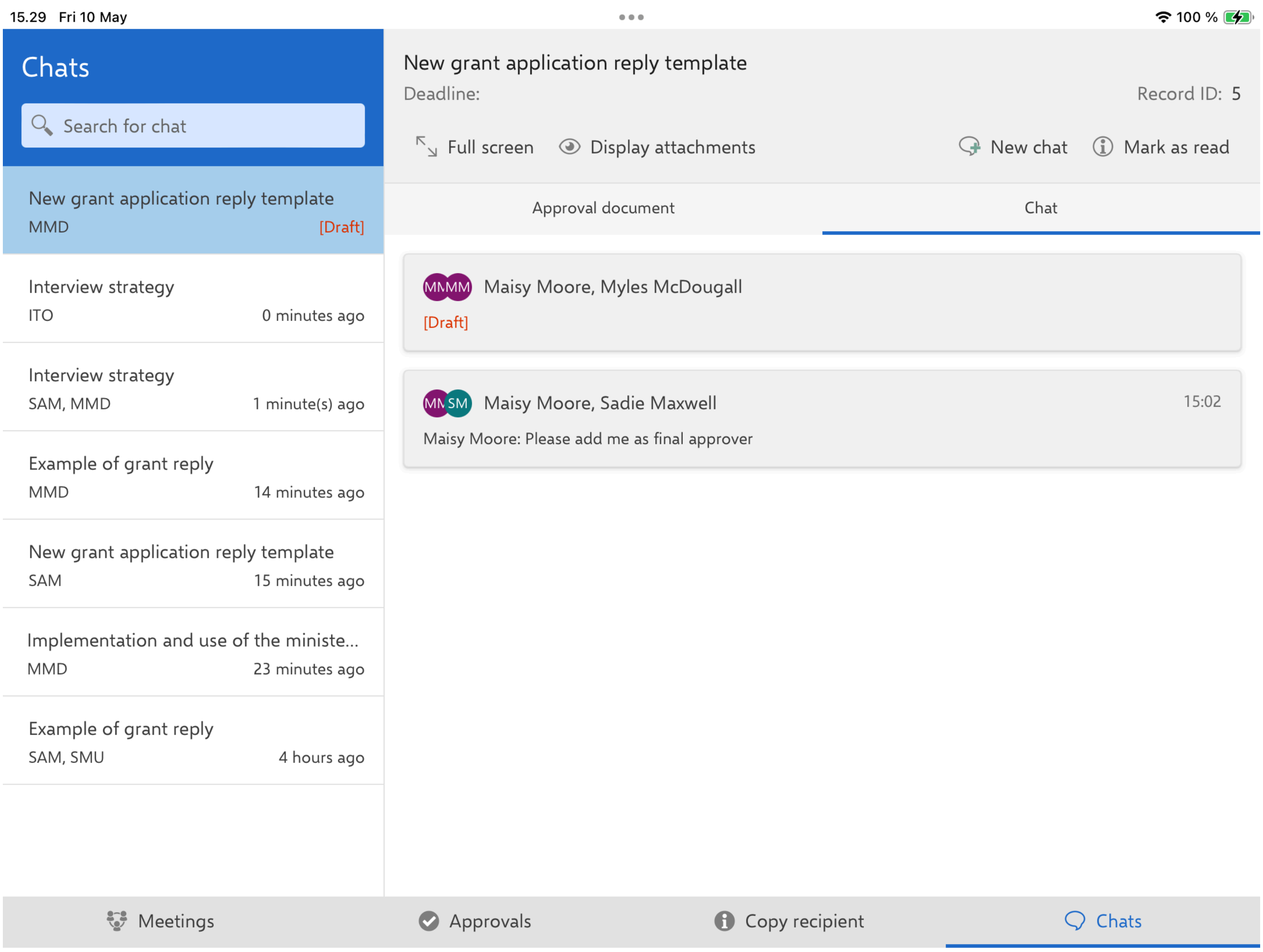


Figure 76. Chat drafts on an approval

Unread chats

Unread chats are also bolded in the chats list.

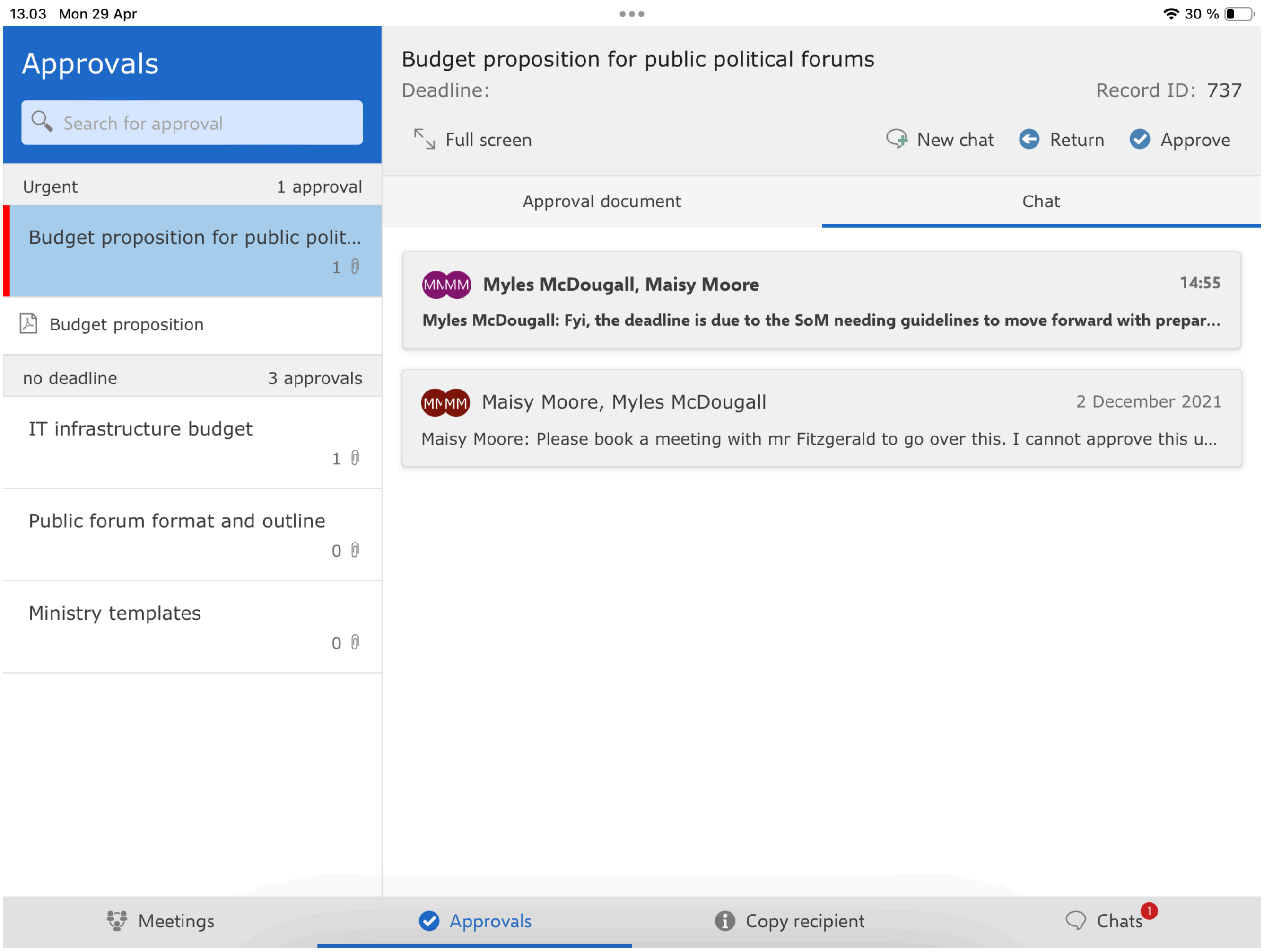


Figure 77. Unread chat on an approval

Chat orientation on approvals

You can receive chats on F2 Manager 2 on approvals you are not an approver on. This type of chat will only appear on the chats list in the "Chats" section. The approval will not be listed on the approvals list.

You can read and annotate the approval and its attached documents, but you cannot process the approval as you are not an approver or copy recipient on it.

When you have read the chat, and perhaps replied to it, you can remove the chat from F2 Manager 2 by tapping on **Remove chat** in the ribbon above the preview. The chat will then be removed from F2 Manager 2, but can still be accessed in F2 Desktop.

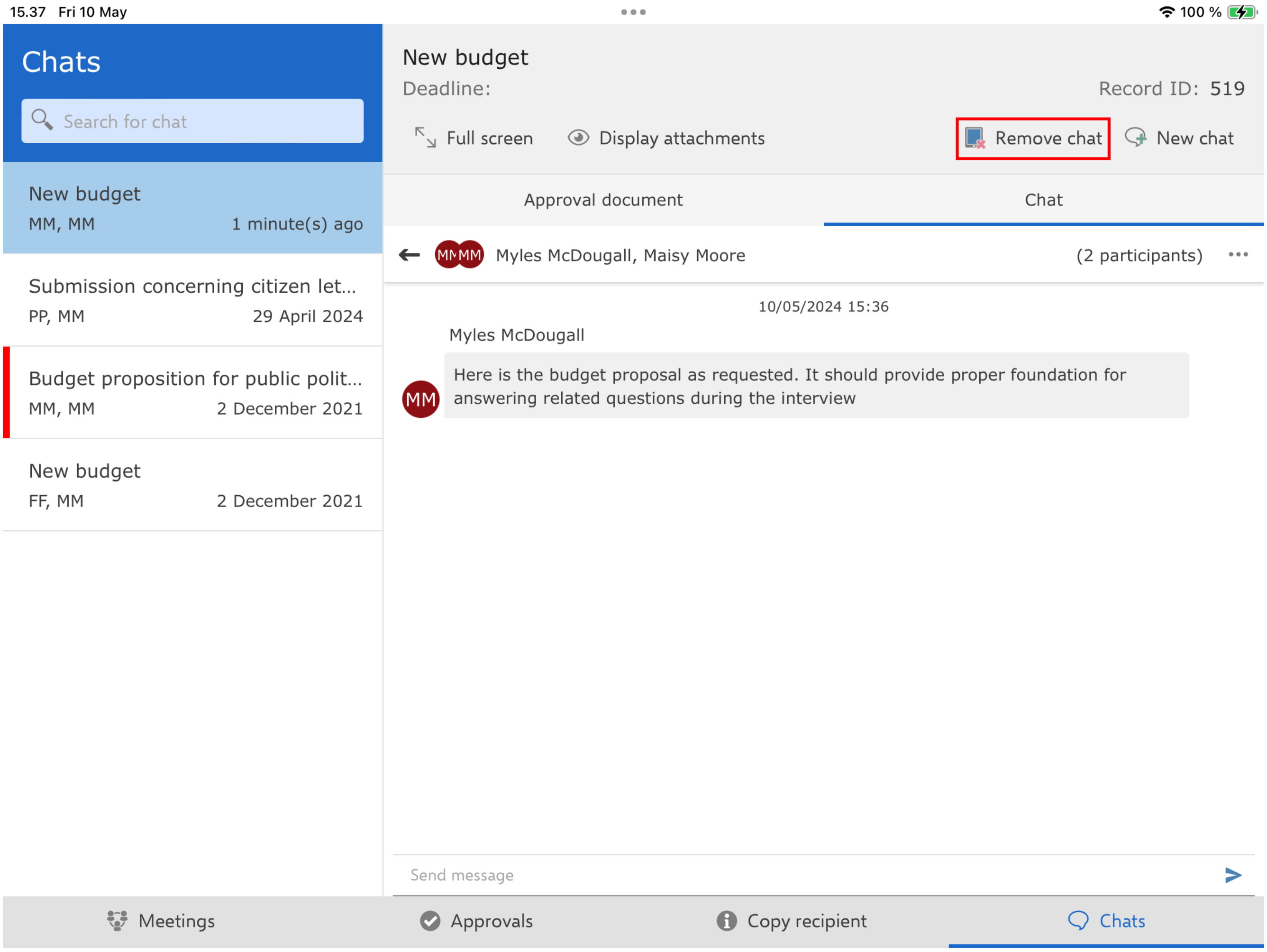


Figure 78. Remove chat from F2 Manager 2

By default, F2 Manager 2 removes the chat upon final approval. A configuration makes it possible to keep chat orientations on the chats list regardless of final approval. If this configuration is used, the chat and approval will remain on F2 Manager 2 for a limited number of days, typically seven days. Configurations are made in cooperation with cBrain.

Offline functionality in F2 Manager 2

With F2 Manager 2, it is possible to open and process meetings and approvals while offline despite a poor or lacking internet connection.

The synchronisation queue tracks offline actions

F2 Manager 2 notifies you at the top if the app is offline. Actions performed in F2 Manager 2 while offline are automatically queued on the device. Once online again, the queued actions are automatically executed.

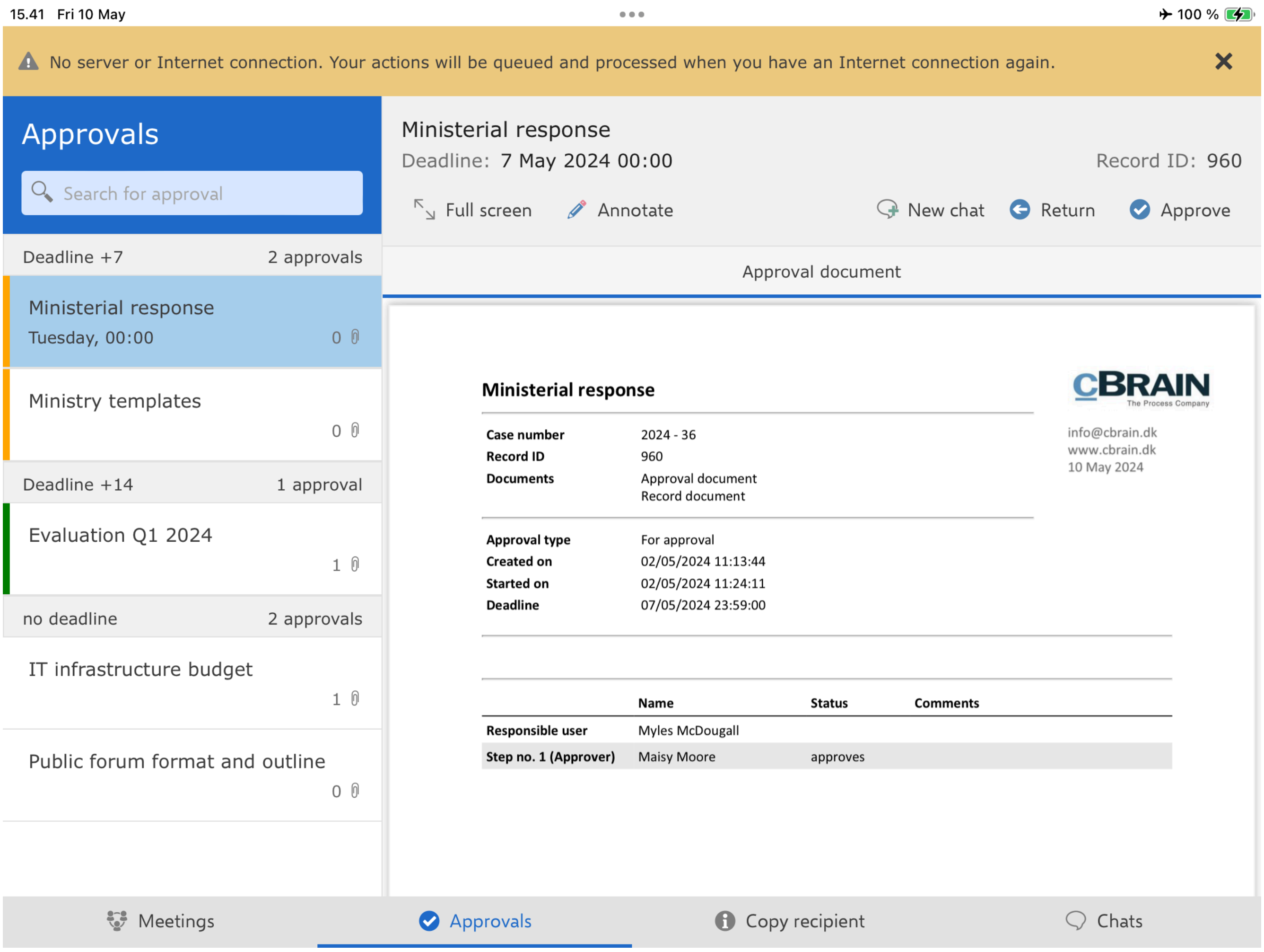


Figure 79. F2 Manager 2 when offline

Multiple actions made on the same approval or agenda item will be carried out in the order in which they were performed offline.

Multiple actions made on different approvals and agenda items are carried out in parallel when F2 Manager 2 is online again.

Handling synchronisation problems

There may be instances where a synchronisation conflict arises, e.g. in the handling of approvals. This can happen for several reasons. Most often, it is due to changes being made in F2 Desktop while F2 Manager 2 was offline.

For example, if F2 Manager 2 were offline while you processed an approval on a flight, and the approval were changed in F2 Desktop in the meantime, a synchronisation conflict arises in F2 Manager 2 once you are online again. This is because F2 Manager 2 cannot deliver the approval, as it may already have been approved or returned by another user in F2 Desktop.

If synchronisation problems occur, F2 Manager 2 will notify you at the top of the screen. Here you can address the issue by completing the original action or opening the approval.

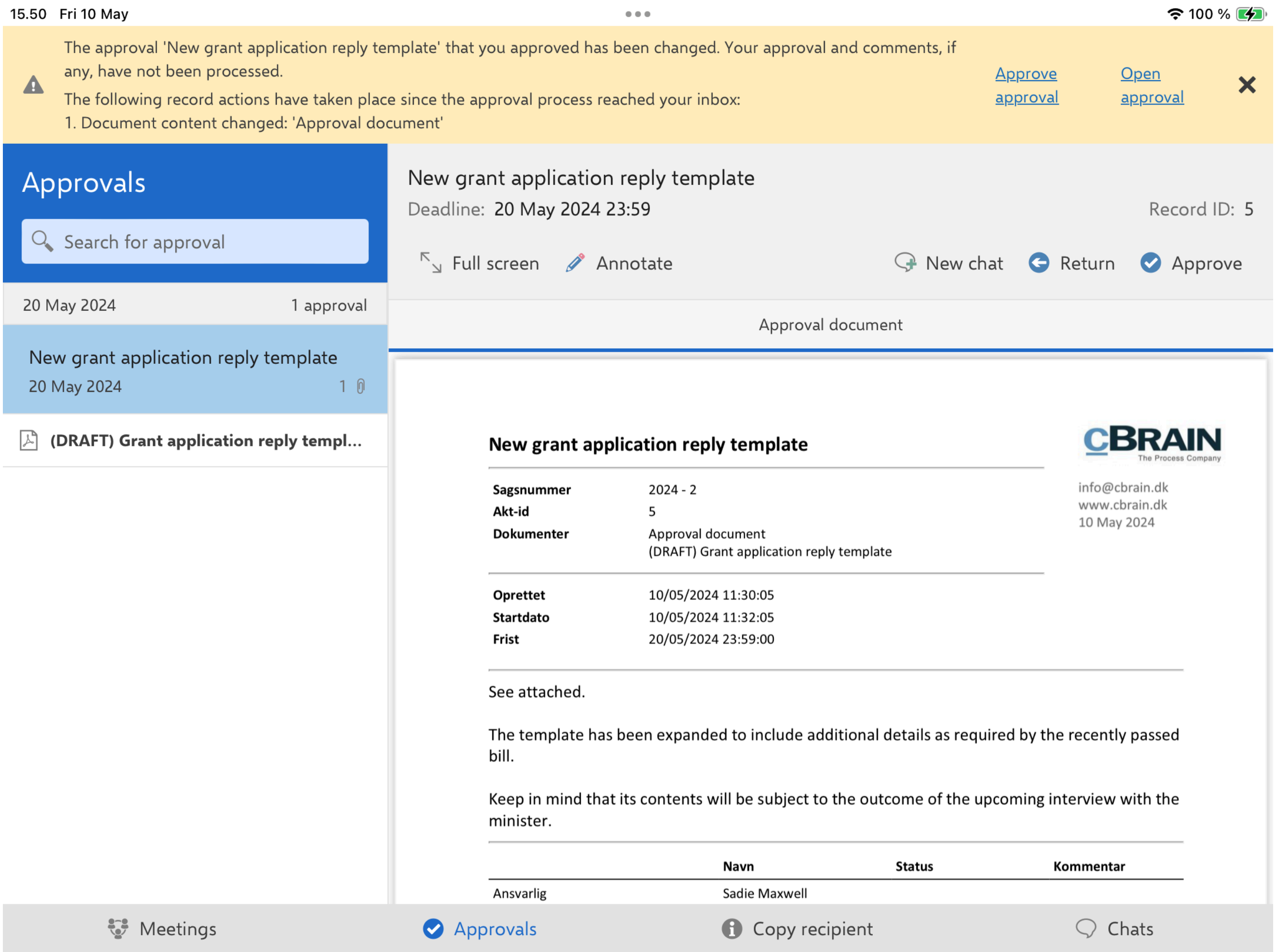


Figure 80. Process a synchronisation issue

NOTE	On installations with the F2 Gated Approvals add-on, synchronisation issues of gated approvers are communicated directly to their gatekeeper.

F2 Manager 2 configuration options

F2 Manager 2 can be configured to fit the needs of the individual organisation. The following can be configured in cooperation with cBrain:

- Restrict a user’s access so they can only log in via F2 Manager 2. This means that the user is excluded from using F2 Desktop and F2 Touch.
- Set up that ministers can only be added to meetings by users with the “On behalf of minister” standard role. This can also be applied to permanent secretaries using the “On behalf of permanent secretary” standard role.
- Choose the default value for adding records to ad hoc meetings (Automatically/Manually).
- Choose the default time periods for when a case is available on F2 Manager 2.
- Choose when approvals received as a copy recipient disappear. The default value is 30 days.
- Choose whether to keep chat-oriented approvals on F2 Manager 2 even when finally approved. If this is applied, approvals remain on F2 Manager 2 for a limited number of days - typically seven days.
- Adjust parts of the title of the annotation document that can be created as part of an approval. By default, the annotating user’s username is included in the document’s title. For example, the user Maisy Moore would be listed as "MM" in the title of an annotation document. It is possible to configure how the title refers to the user so that Maisy Moore, for example, is referred to by her full name or by her initials as specified in the participant register.

NOTE The above list of configurations is not exhaustive. cBrain recommends that all configurations are made in cooperation with cBrain.