F2 Touch

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F2 Touch

F2 Touch lets you access selected F2 Desktop functions such as case and email processing, chats, approvals, requests, and more. Use F2 Touch for case work on the go and to communicate with colleagues and external participants.

You can use F2 Touch on different devices such as iPhones, iPads, and Android smartphones and tablets, as well as common Internet browsers for PC and Mac. F2 Touch supports both a compact and a wide layout.

Options in F2 Touch

F2 Touch is a lighter version of F2 Desktop. There are minor differences in the functionality between F2 Desktop and F2 Touch. These differences are described where relevant.

Search in lists and folders: F2 Touch provides access to most of the lists and folders from F2 Desktop. You can also search in the lists and folders.

Create records and cases: Create new records, edit them, and attach documents to the records. Add records to existing cases or create new cases. You can also perform various actions on records while offline.

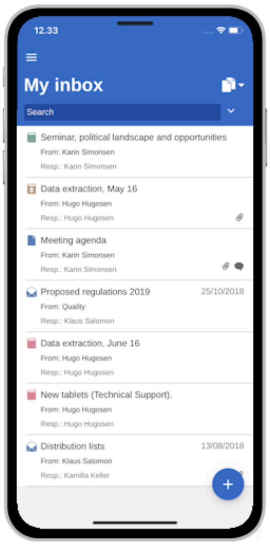
Communicate in multiple ways: Create emails, chats, notes, and annotations. You can also reply to chats and emails via push notifications on your device’s lock screen.

F2 add-on modules: Use a range of F2 add-ons within F2 Touch: Request, cSearch, Approvals, Gateway Approvals, and Manager.

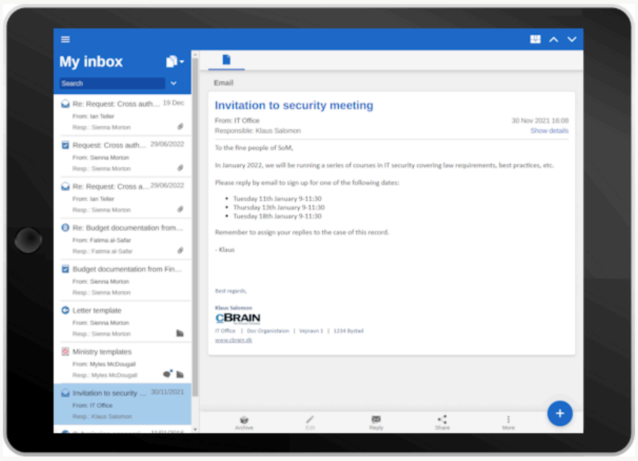
Support for two layouts

F2 Touch supports two different layouts that are automatically applied depending on window size:

Compact layout: For devices with smaller screens such as iPhones and Android phones.



Wide layout: For devices with larger screens such as iPads, Android tablets, Mac, and PC.



There are no functionality differences between the compact and the wide layout. The description and images in this documentation are primarily based on the iPhone version with the compact layout. If there is a variation between iPhone and Android, it will be mentioned.

Set up and log in to F2 Touch

F2 Touch is available in the Apple App Store for iPhone and in Google Play for Android.

As settings and setup vary according to the operating system of the device, the following setup sections are divided based on operating system: setup on iOS and setup on on Android.

Login options also vary depending on the operating system. Read more about logging in to F2 Touch on iOS and logging in to F2 Touch on Android.

Set up F2 Touch on iOS

In order to use F2 Touch, the app must first be set up to the correct server address.

To set up F2 Touch on an iPhone or iPad, tap **Settings** on the device.

Figure 1. The iOS settings icon

Tap **F2 Touch** in the menu to navigate to the F2 settings screen.

Next to the “Server Address” field, enter the URL for F2 Touch. The URL is provided by cBrain.

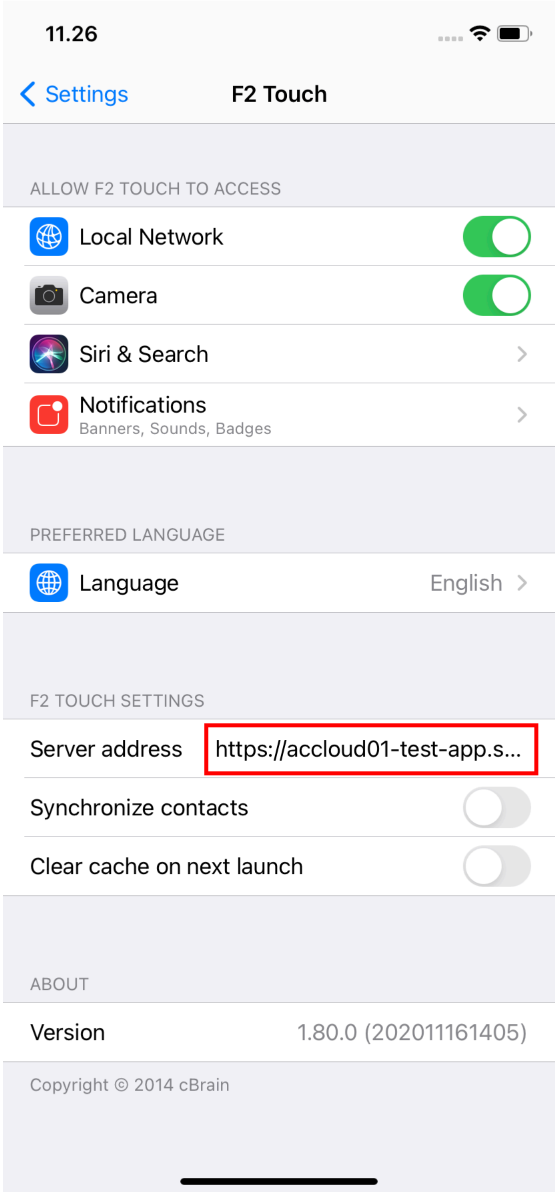


Figure 2. Server address on iOS

In the settings you can also enable notifications and synchronisation of contacts to and from F2 Touch.

Log in to F2 Touch on iOS

When F2 Touch is set up and the app is opened, a login screen appears. Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using your password, Touch ID, Face ID, or the "Remember me" function. Login method is chosen upon login.

If the "Touch ID" or "Face ID" login features are enabled in addition to "Remember me" in the organisation's configuration, you can choose which login method to use. It is possible to switch login method as long as the configuration allows it.

For safety reasons F2 Touch asks you to re-enter your password every 30 days.

Log in with password on iOS

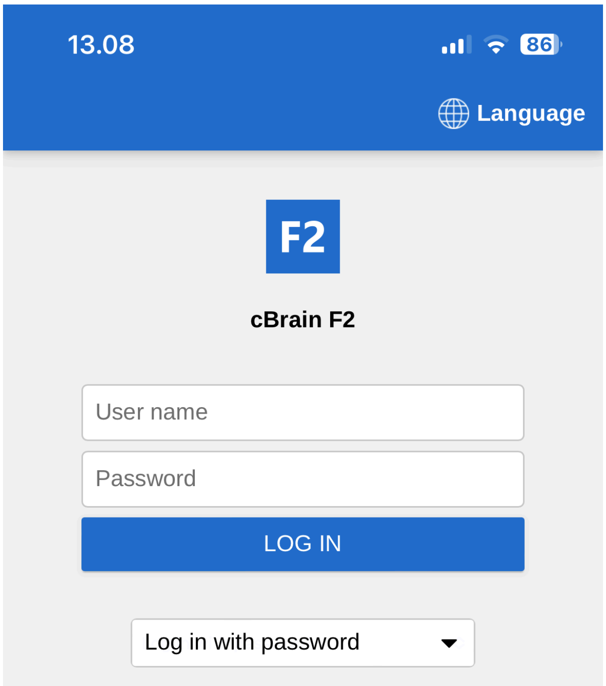


Figure 3. Log in with password

Fill in the “Username” and “Password” fields using the same information used to log in to F2 Desktop.

Then tap **Log in** to log in.

Log in with Touch ID on iOS

You can log in with Touch ID (fingerprint) on supported devices.

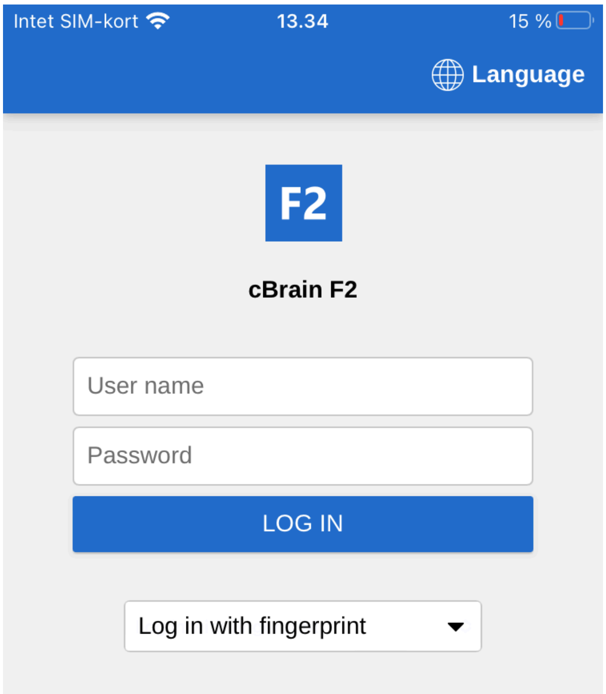


Figure 4. Log in with Touch ID

NOTE Touch ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option “Log in with fingerprint” in the menu. Then scan your finger to activate the fingerprint scanner.

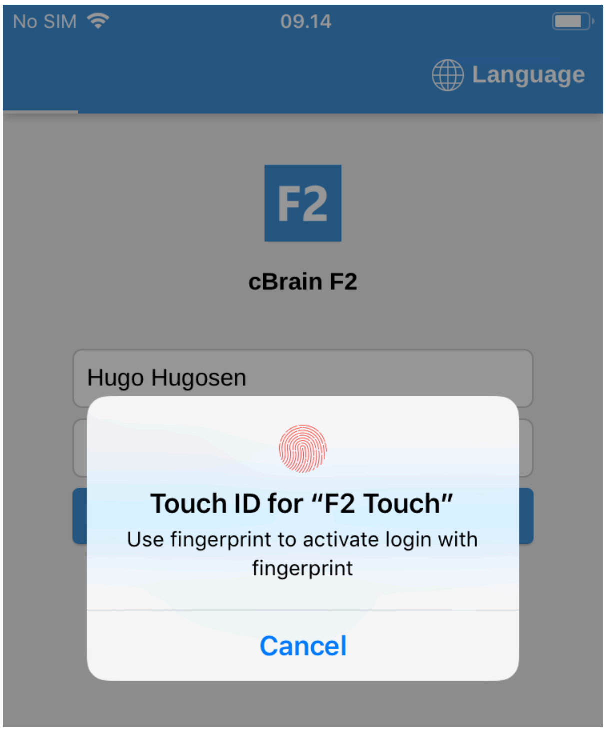


Figure 5. Activate Touch ID

NOTE Touch ID can only be activated after logging in using a password.

When Touch ID is enabled, scan your finger to log in to F2 Touch.

Unsuccessful Touch ID login attempts are handled by your device’s operating system. iOS allows three failed login attempts, after which you must enter your password. Tap **Cancel** to return to the login screen.

Log in with Face ID on iOS

F2 Touch for iOS supports Face ID on iPhone X (or newer). This makes it possible to log in to F2 Touch using facial recognition.

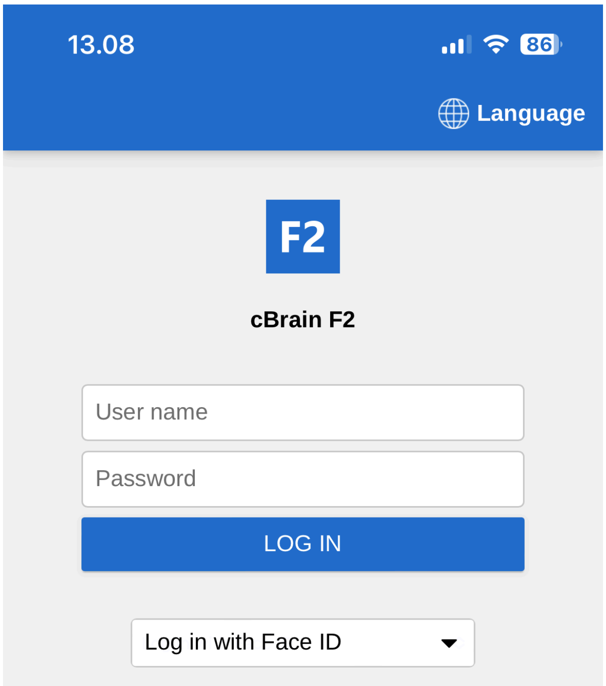


Figure 6. Log in with Face ID

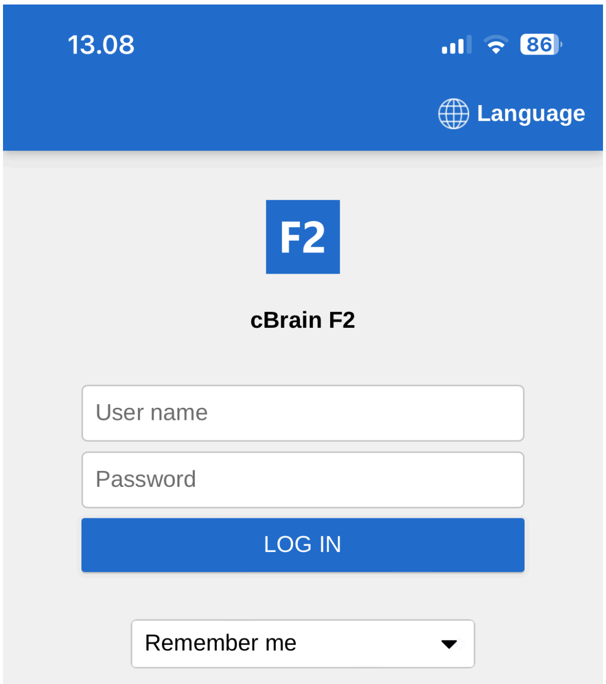
NOTE Face ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option “Log in with Face ID” in the drop-down menu. Your face is then scanned to activate the Face ID.

NOTE Face ID can only be activated after logging in using a password.

Log in with “Remember me” on iOS

You can log in using “Remember me”. This means you don’t have to enter your login information every time you open F2 Touch.



NOTE "Remember me" is activated through a configuration that is performed in cooperation with cBrain.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

The login page remembers the latest user, unless the user logs out of F2 Touch manually.

NOTE A user with the "User administrator" privilege can log out another user of all F2 sessions. This will delete any "Remember me" information, which means you must log in using "Remember me" again.

Change users on iOS

If you return to the login screen after your session expires or by way of closing the F2 Touch app, you will have the option to change users.

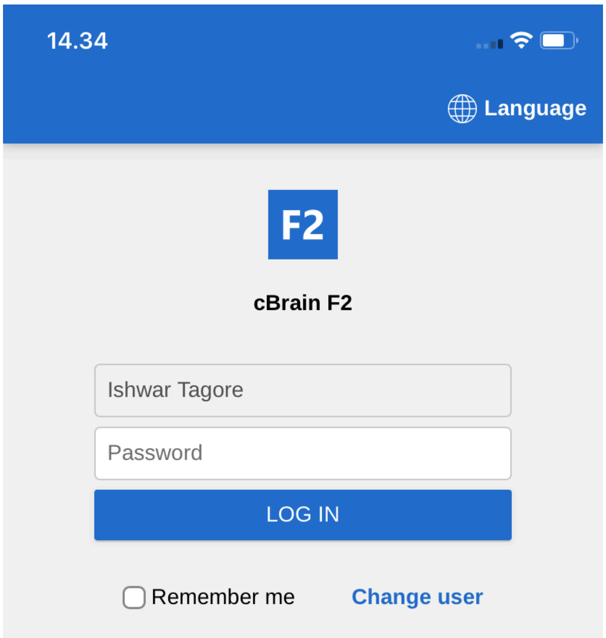


Figure 8. Change user

Tap **Change user** and enter the new login information. Then tap **Log in**.

The login role selector on iOS

If you have multiple roles in F2, you can choose between them during login.

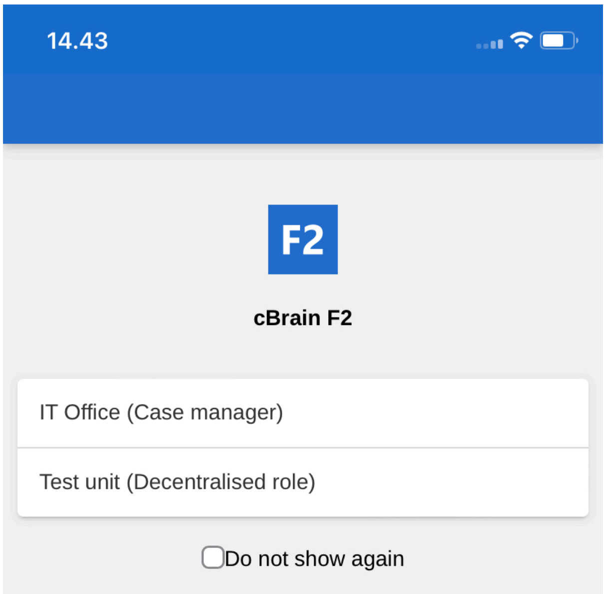


Figure 9. Select role at login

Tap “Do not show again” to skip the role selector during the next login.

You can choose a default role in the “Setup” dialogue on F2 Desktop. If a default role has been set up, you are automatically logged in with this role on F2 Touch.

Select language on iOS

Select the language for F2 Touch on the login screen.

Tap **Language** and select the wanted language in the dialogue. This is only possible if your F2 Touch installation supports more than one language.

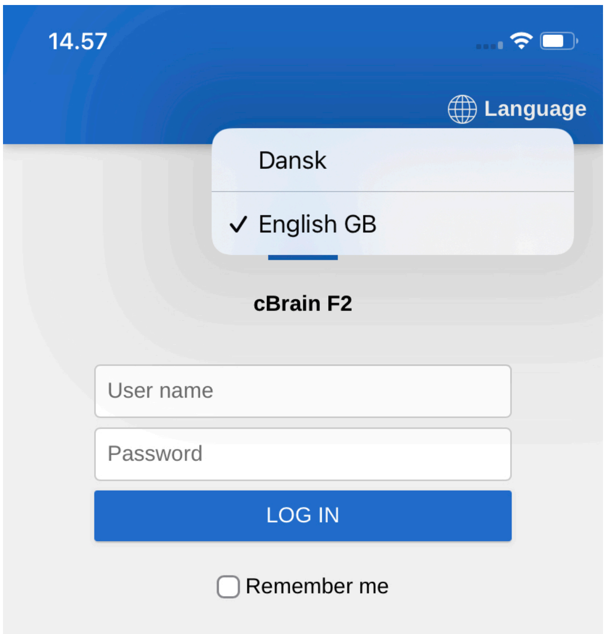


Figure 10. Select language on iOS

NOTE F2 Touch always displays the language that was selected at the initial login.

You can also select language in your device’s settings.

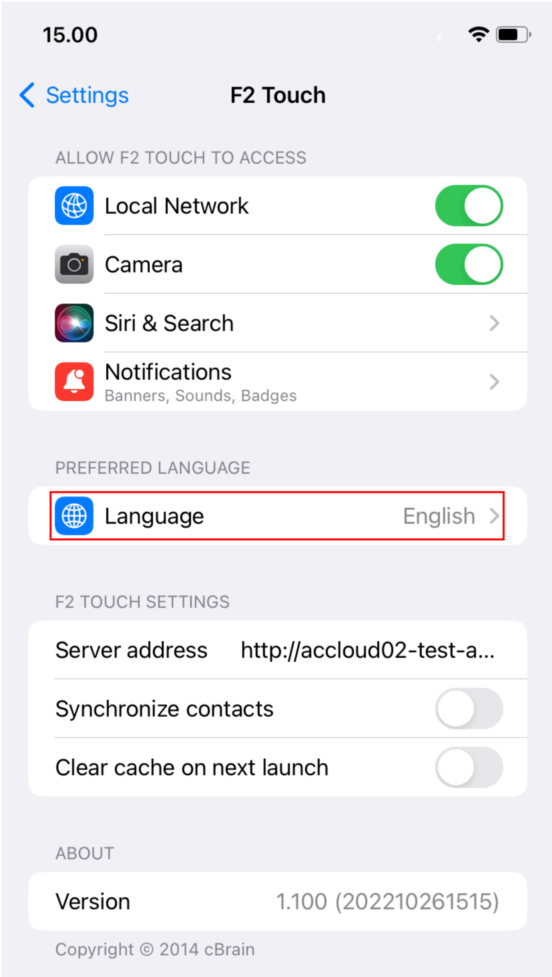


Figure 11. Select language in the iOS device settings

Set up F2 Touch on Android

First time you open F2 Touch on an Android device, you will be prompted to enter a server URL provided by cBrain. Here you can also choose whether to use a secure connection. Then press **CONTINUE** to proceed to the login screen.

Before logging into F2 Touch, you can adjust certain settings. Tap **Settings** in the top right corner of the login screen to open the settings.

Here you can enable notifications and synchronisation of contacts to and from F2 Touch.

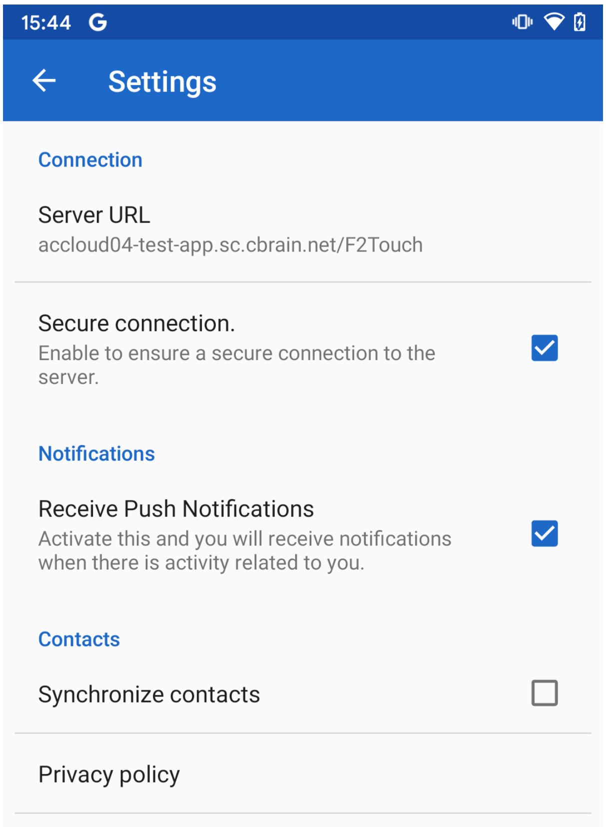


Figure 12. Settings on Android

Tap the **arrow** in the top left corner to save and return to the login screen.

Log in to F2 Touch on Android

Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using you password, your fingerprints, or the "Remember me" function. Login method is chosen upon login.

If the "Remember me" and fingerprint login functions are both enabled in the organisation's configuration, you can choose which login method to use. It is possible to switch between the different options as long as the configuration allows it.

Log in with password on Android

It is possible to log in using a password similarly to logging in on F2 Desktop.

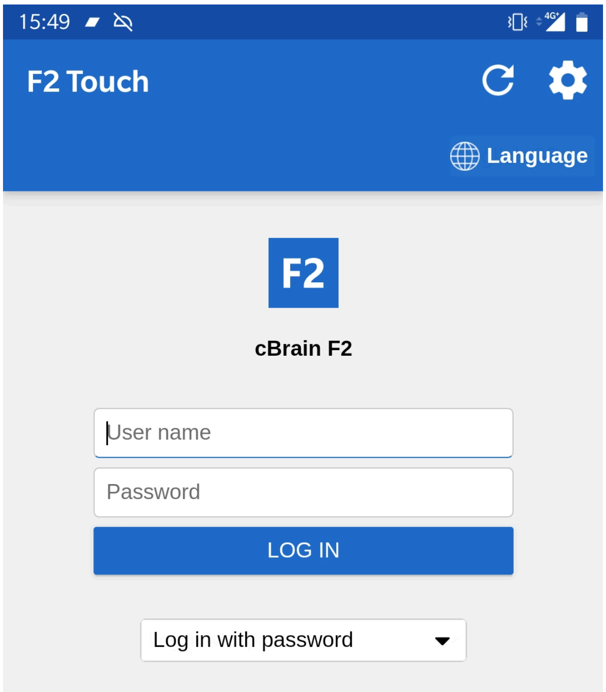


Figure 13. Log in using a password

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

Log in with fingerprint on Android

It is possible to log in using the fingerprint login function on Android devices that support this feature.

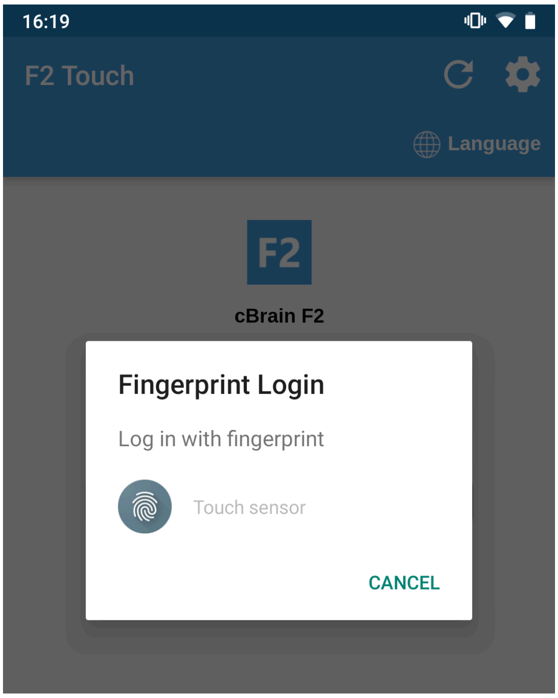


Figure 14. Activate Fingerprint Login

Enter username and password and tap **Log in**. A new dialogue in F2 Touch appears, asking the user to “Touch sensor”.

Now scan the finger to activate the fingerprint login function.

NOTE	The fingerprint login function can only be activated by logging in once using a password.

Unsuccessful fingerprint login attempts are handled by the individual device’s operating system. Tap **Cancel** to return to the login screen.

Log in with “Remember me” on Android

You can log in using “Remember me”. This means you don’t have to enter your login information every time you open F2 Touch.

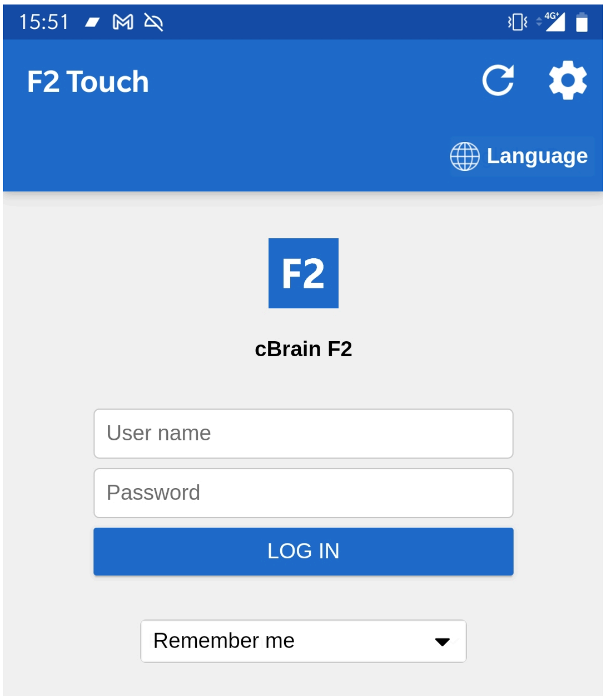


Figure 15. Log in using “Remember me”

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

The login page remembers the latest user, unless the user logs out of F2 Touch manually.

NOTE	A user with the "User administrator" privilege can log out another user of all F2 sessions. This will delete any "Remember me" information, which means you must log in using "Remember me" again.

Change users on Android

If you return to the login screen after your session expires or by way of closing the F2 Touch app, you will have the option to change users.

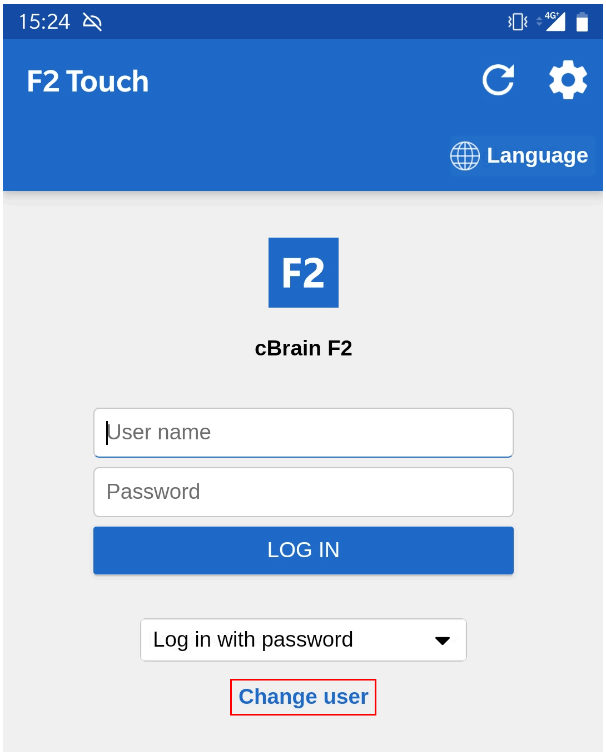


Figure 16. Change user

Tap **Change user** and enter the new login information. Then tap **Log in**.

The login role selector on Android

If a user has multiple roles in F2, it is possible to choose between them during login.

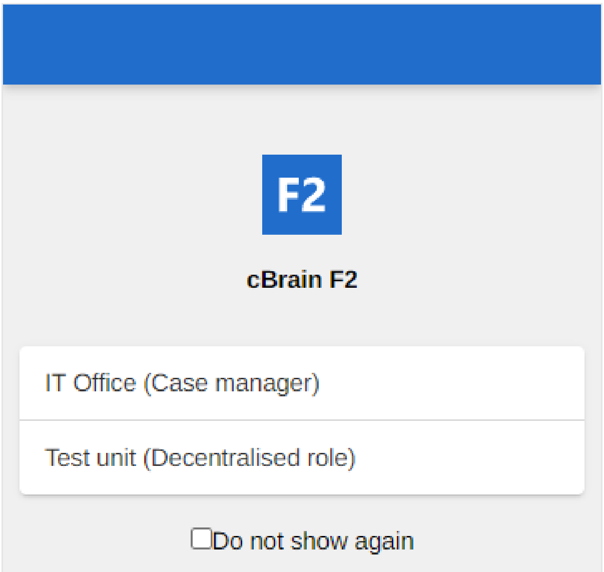


Figure 17. Select job role on Android

Tap “Do not show again” to avoid being presented with the role selector during the next login.

It is possible to choose a default role in the “Setup” dialogue on F2 Desktop. If a default role has been set up, the user is automatically logged in with this role on F2 Touch.

Select language on Android

Select the language for F2 Touch on the login screen.

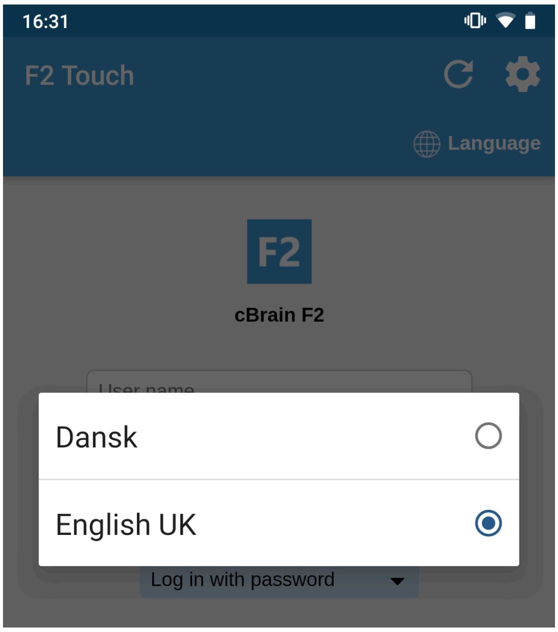


Figure 18. Select language on Android

Tap **Language** and select the wanted language in the dialogue. This is only possible if your F2 Touch installation supports more than one language.

NOTE F2 Touch always displays the language that was selected at the initial login.

Log out and “Remember me”

You can access the logout function in F2 Touch by swiping right from a list or by tapping the menu icon.

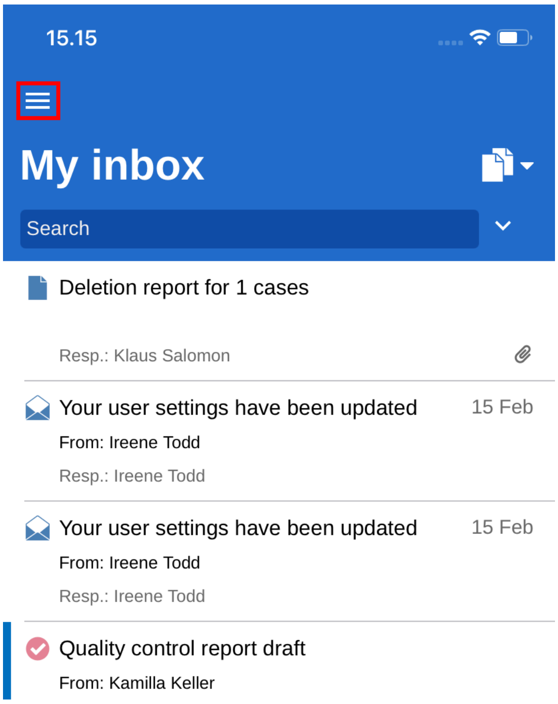


Figure 19. The F2 Touch menu icon

To log out of F2 Touch, swipe right and tap **Log out**.

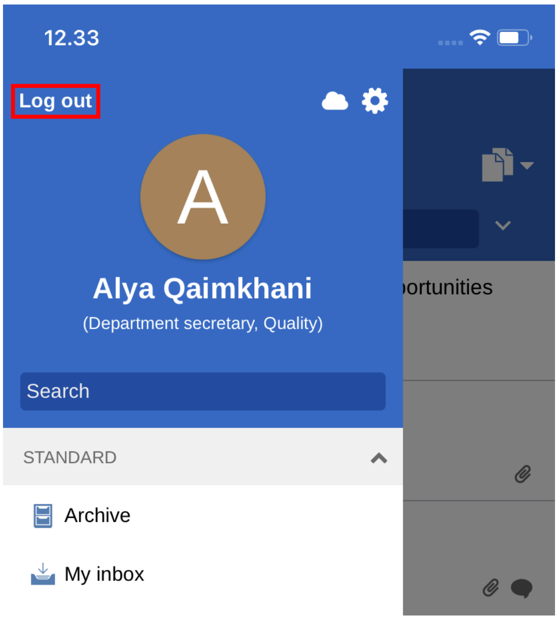


Figure 20. Log out of F2 Touch

By tapping **Log out**, a dialogue appears as displayed to the left.

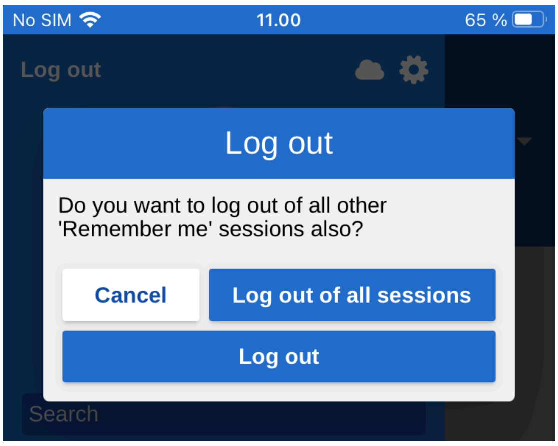


Figure 21. The "Log out" dialogue

In this dialogue there are three options:

- **Log out**: You are logged out, but F2 Touch will keep the tick in the "Remember me" box.
- **Log out of all sessions**: F2 Touch logs you out and removes the tick in the "Remember me" box.
- **Cancel**: Cancels the action and returns you to the list view.

Depending on your setup, you can reset the "Remember me" function by clicking **Log out** on any device where you have used this function.

NOTE	A user with the "User administrator" privilege can log out another user of all F2 sessions. This will delete any "Remember me" information, which means you must log in using "Remember me" again.

F2 Touch Intune

cBrain offers an F2 Touch module that is compatible with Microsoft Intune. F2 Touch Intune has functions similar to that of F2 Touch, but is subject to the security model configured in Microsoft Intune by the organisation. Contact cBrain for further information.

Additionally, F2 Touch Intune can be configured so users can only log in through MSAL (Microsoft Authentication Library). This configuration disables the login methods described above.

Contact cBrain for further information.

NOTE F2 Touch Intune requires the F2 Touch add-on module.

Settings in F2 Touch

To go to settings, swipe right on a list or tap the **menu icon** above the lists and folders view.

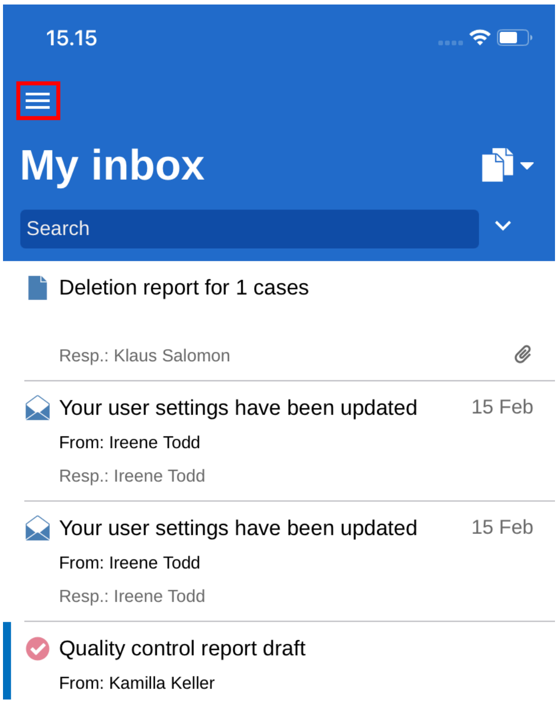


Figure 22. The F2 Touch menu icon

Tap **Settings** in the upper right corner.

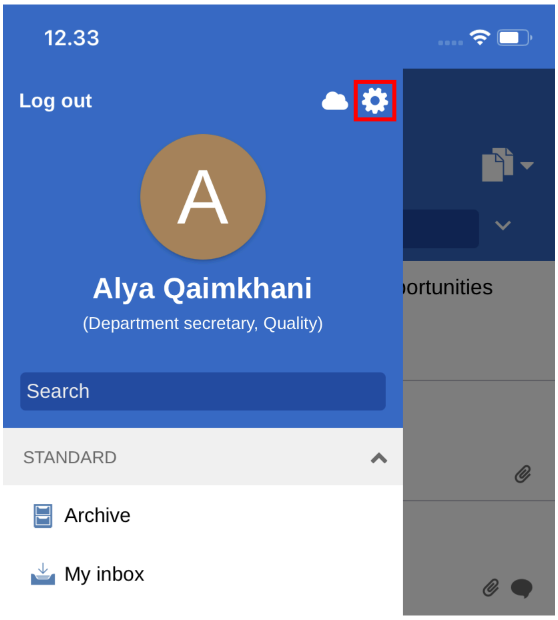


Figure 23. The settings icon

In “Settings” you can, for example, assign "On behalf of" rights to another user and set up an "Out of office" message.

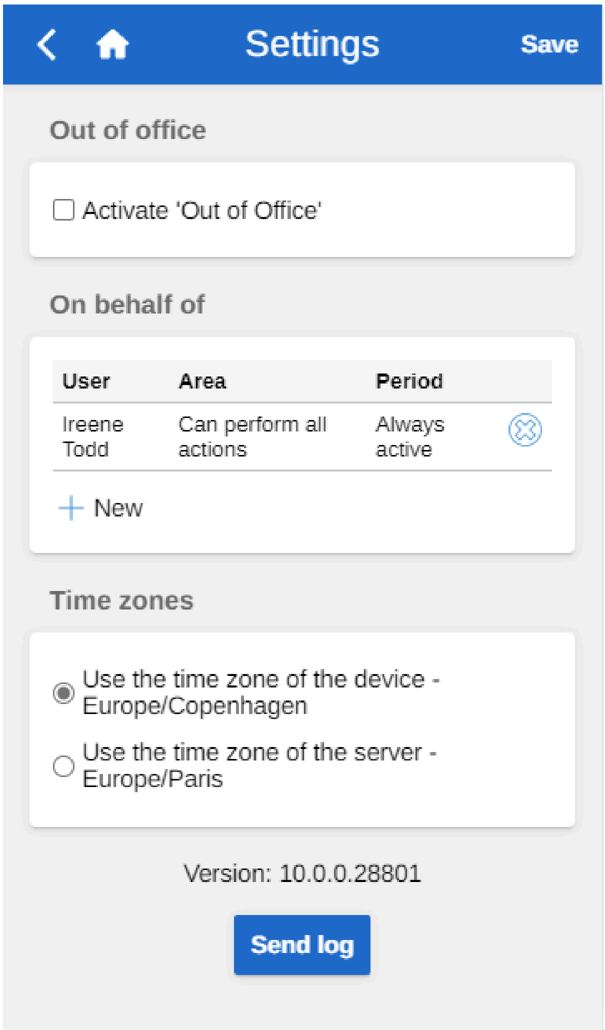


Figure 24. Personal settings

The following sections describe the personal settings in F2 Touch.

Number of records in inbox

You can adjust the number of records shown in your inbox.

Adjust the number of records by dragging the slider.

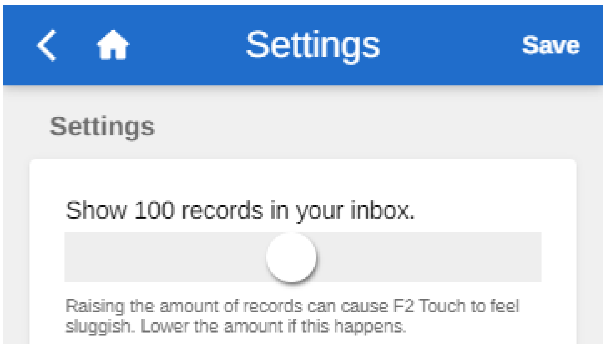


Figure 25. Adjust the number of records in your inbox

Tap **Save** to apply your changes.

NOTE If you set F2 Touch to display a high number of records, your inbox may take a long time to load. To decrease the loading time, reduce the number of displayed records.

Download documents to inbox

You can choose when you want F2 Touch to download documents to your inbox.

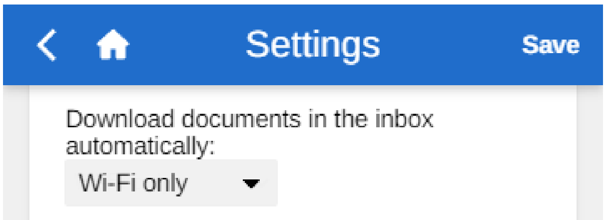


Figure 26. Choose when to download documents

Choose between:

- **Always.** Documents are downloaded whenever your device has an Internet connection.
- **Wi-Fi only.** Documents are downloaded when your device has a Wi-Fi connection.
- **Never.** Documents are not downloaded.

Tap **Save** to apply your changes.

Duration of automatic status messages

You can choose for how long F2 Touch shows automatic status messages from which you can undo an action. An automatic status message is shown e.g. when you send an email or when you change your personal settings and leave the "Settings" screen without saving your changes.

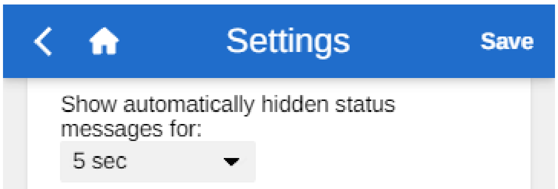


Figure 27. Choose the duration of automatic status messages

Choose between:

- 5 seconds
- 30 seconds
- 2 minutes.

Tap **Save** to save your changes.

NOTE Actions that can be undone from automatic status messages are carried out only after the status message disappears. For example, if you have chosen to show automatic status messages for two minutes, an email is only sent two minutes after you tapped "Send" in the record window.

Show role selector at login

You can choose to show the role selector before you log in on both iOS and Android. Your choice here affects both F2 Touch and F2 Desktop.

Tick the box next to **Show role selection at login**.

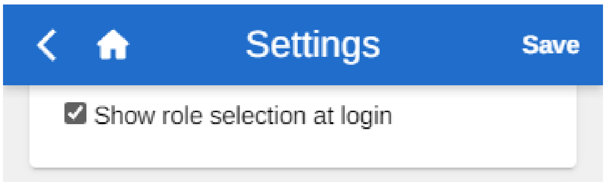


Figure 28. Show role selection at login

Tap **Save** to apply your changes.

“Out of office”

In F2 Touch you can create and set up an “Out of office” message. The procedure is the same as in F2 Desktop.

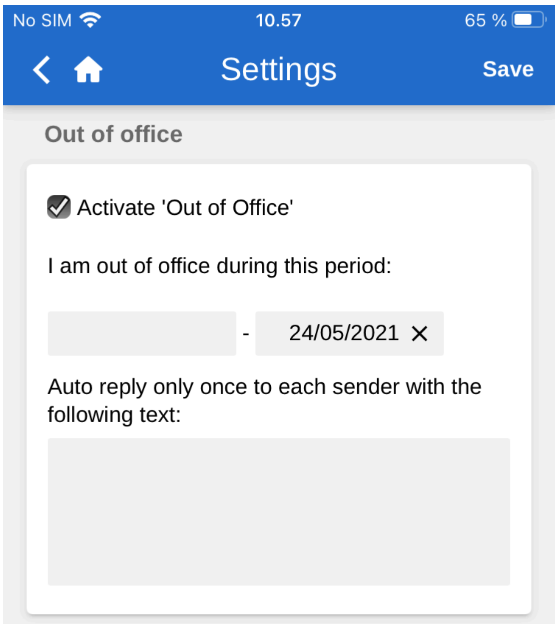


Figure 29. Setting up “Out of office”

Tick the **Activate ‘Out of office’** box and specify:

- Return date. Fill out the two date fields. Tap a field to open a calendar.

Tap **Save** to apply your changes.

“On behalf of” rights

In F2 Touch you can assign “On behalf of” rights to another user by tapping **New** under the “On behalf of” header.

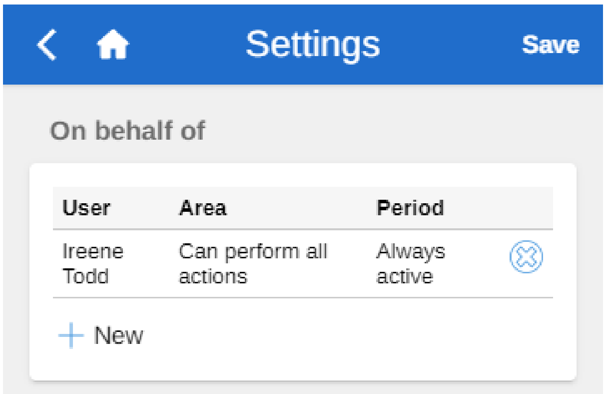


Figure 30. New “On behalf of”

It is then possible to specify:

- Which user the privilege is given to.
- If the user receiving the privilege can perform all actions on behalf of you or only handle approvals (requires the F2 Approvals add-on).
- When the “on behalf of” rights start.
- When the “on behalf of” rights expire.

Tap **Create** to complete.

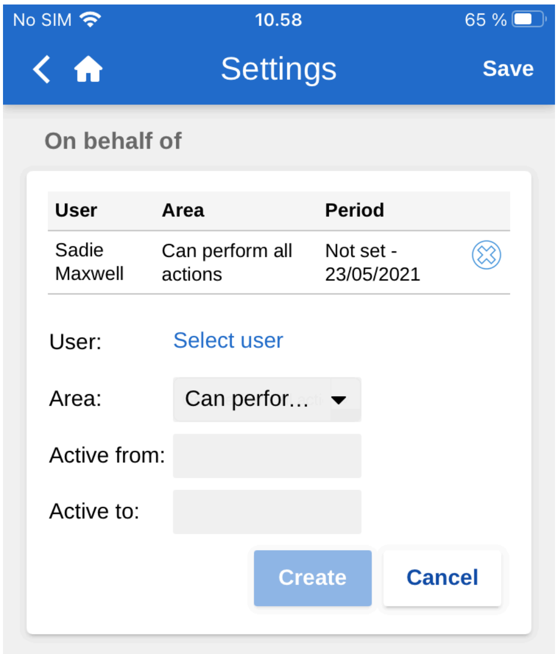


Figure 31. Set up “On behalf of”

You can remove "On behalf of" rights from a user by tapping the **delete icon** next to their username.

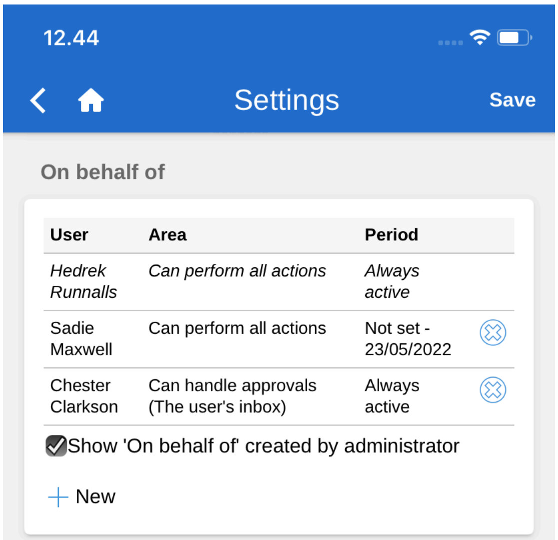


Figure 32. Remove "On behalf of"

Tap **Save** to apply your changes.

Tick the box **Show 'on behalf of' created by administrator** to display any users with "On behalf of" rights created by a user with the "On behalf of administrator" privilege.

The users with "On behalf of" rights created by an administrator are hidden by default.

Select time zone

F2 Touch's time and date are based on the device's time zone by default. F2 Touch can be configured to also have the option of using the server's time zone.

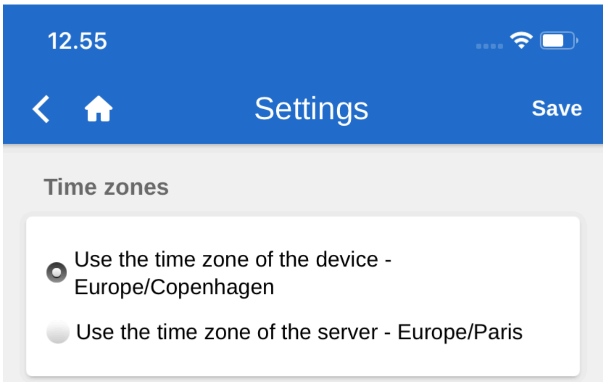


Figure 33. Select time zone

The selected time zone is used for deadlines and similar fields. If you are using the device's time zone, deadlines will be shown in your local time zone, also when you are abroad. This also applies when you set a time and date in connection with e.g. deadlines or searches. If the time and date is generated on the server, it will always reflect the server's time zone.

Tap **Save** to apply your changes.

The configuration is performed in cooperation with cBrain.

Send log manually

At the bottom of the "Settings" screen, it is possible to send logs manually.

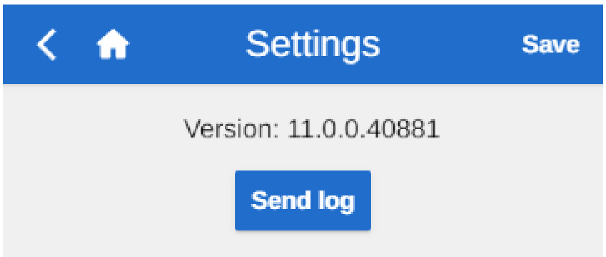


Figure 34. Send log

Tap the **Send log** button to send a log to cBrain. This function can be used to report any errors experienced in F2 Touch.

Lists and folders in F2 Touch

F2 Touch contains the majority of all the lists and folders that a user has access to in F2 Desktop, such as “My desktop”, “My archive”, and favourite and personal searches. The “Latest documents” list is not available.

Show lists and folders

Swipe right from the inbox or a list to see an overview of lists and folders. Swipe left to hide the overview again.

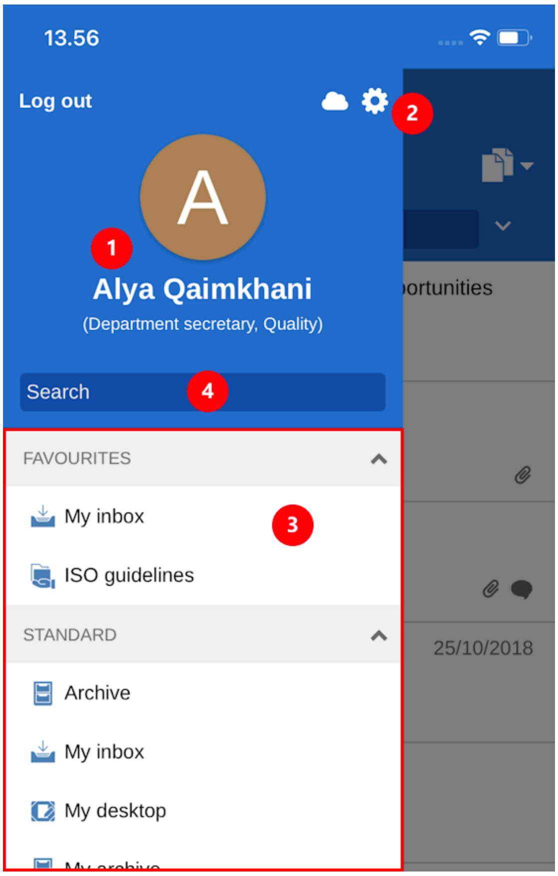


Figure 35. The overview of lists and folders

The overview shows:

- User identification (1).
- The "Settings" menu item (2), where you can change your personal settings.
- Your favourite searches and standard lists (3).
- A search field (4) used for filtering your lists. Enter a text string in the field. F2 Touch will automatically start showing lists that match the text. Filtering is effective for creating an overview in a large number of lists.

You can also access lists and folders by tapping the **menu icon** in the upper left corner.

Figure 36. Access lists and folders

My inbox

When you open F2 Touch, “My inbox” is displayed as shown below.

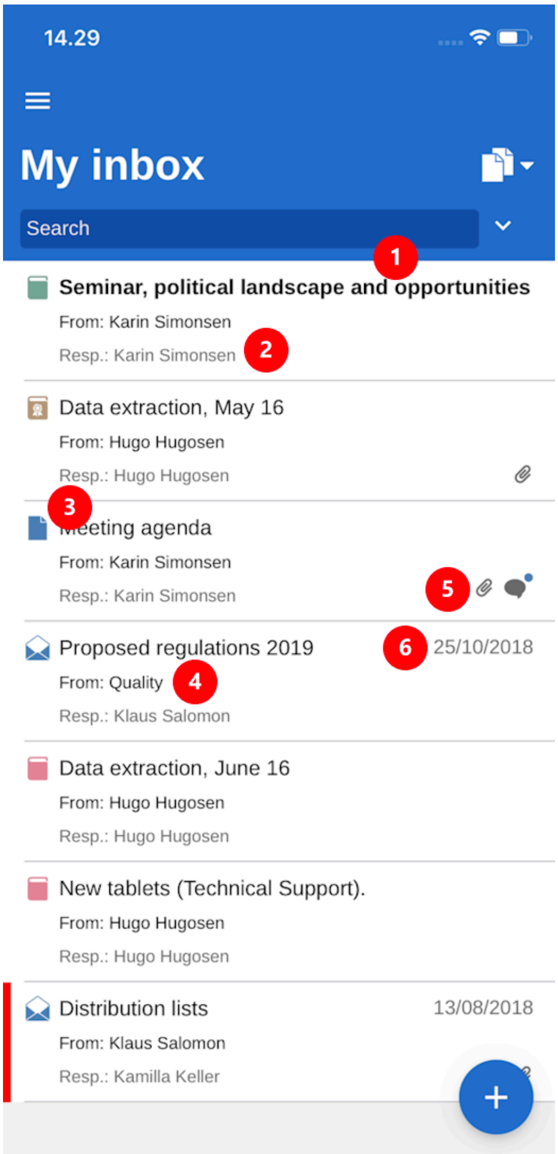


Figure 37. The "My inbox" list

The following is displayed for every record:

- Title (1).
- The name of the user responsible for the record (2).

- Record type (can be identified by the icon) (3): Record, email, approval, or request. Additionally, a gatekeeper can identify approval's location in the approval gateway here.
- Sender, if the record has been sent (4).
- Attached documents, chats, notes, or annotations (5).
- Letter date (6), if the record has been sent.

Titles of unread records are bolded.

Navigating the result list

When F2 Touch is opened, there are a number of options for navigation, archiving, etc., in the result list. These options apply to all lists in F2 Touch.

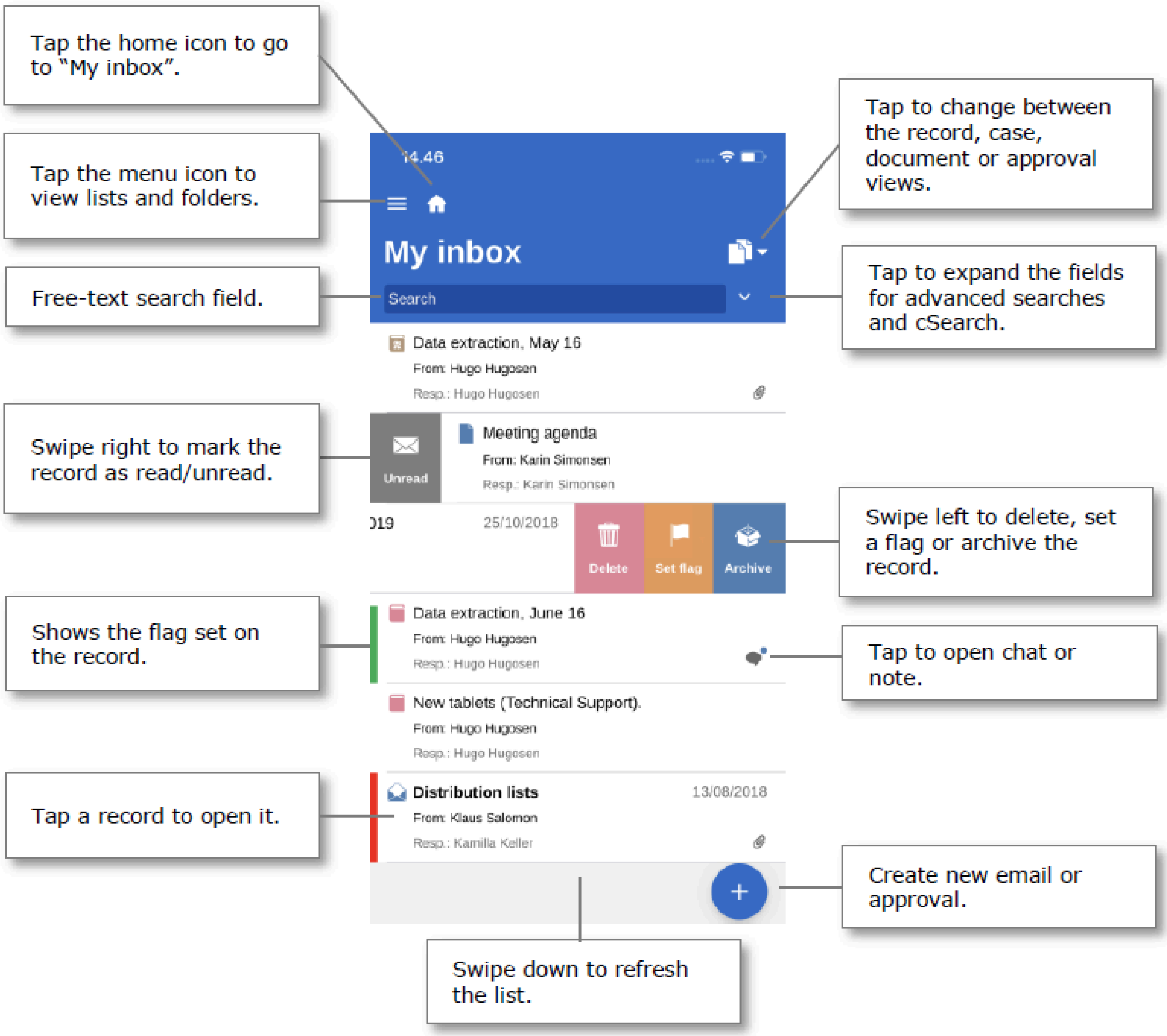


Figure 38. Navigation options for lists

The record, case, document and approval views in the result list

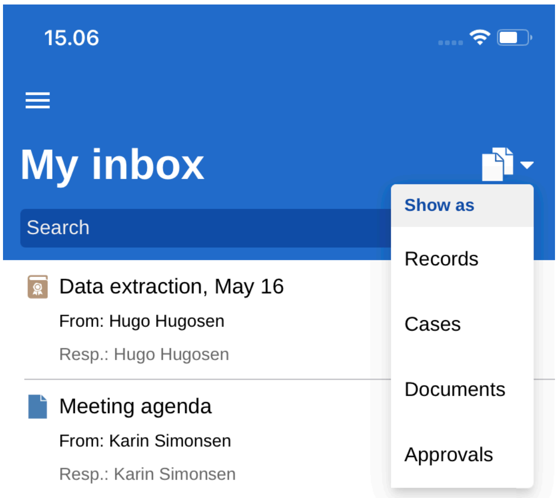


Figure 39. Change list view

Tap the **View mode icon** to switch between the different result list views: record (default view), case, document, and approval list view.

The list view determines the parameters by which items are sorted. Each set of parameters are a default for the given F2 installation.

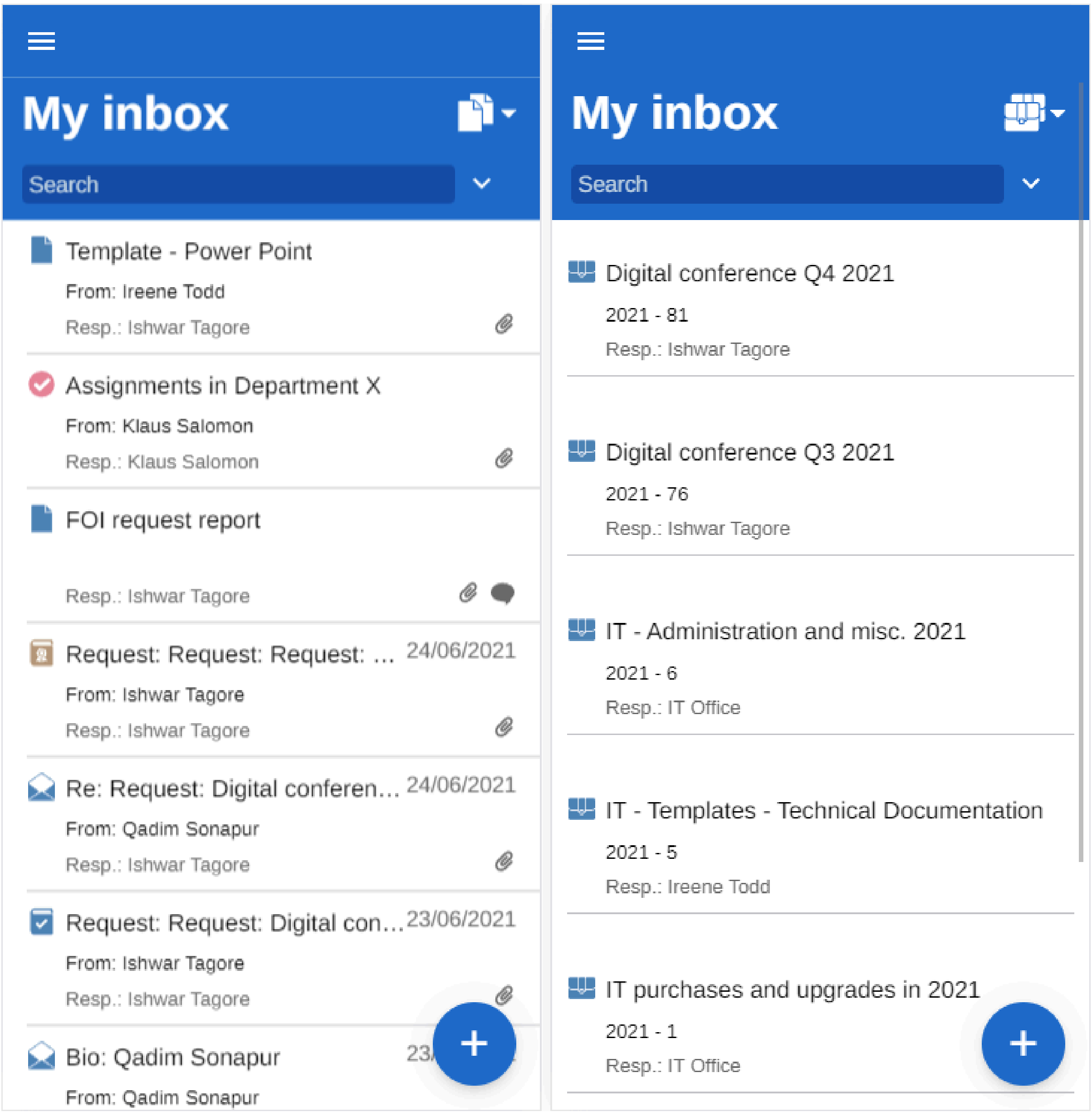


Figure 40. The record and case views

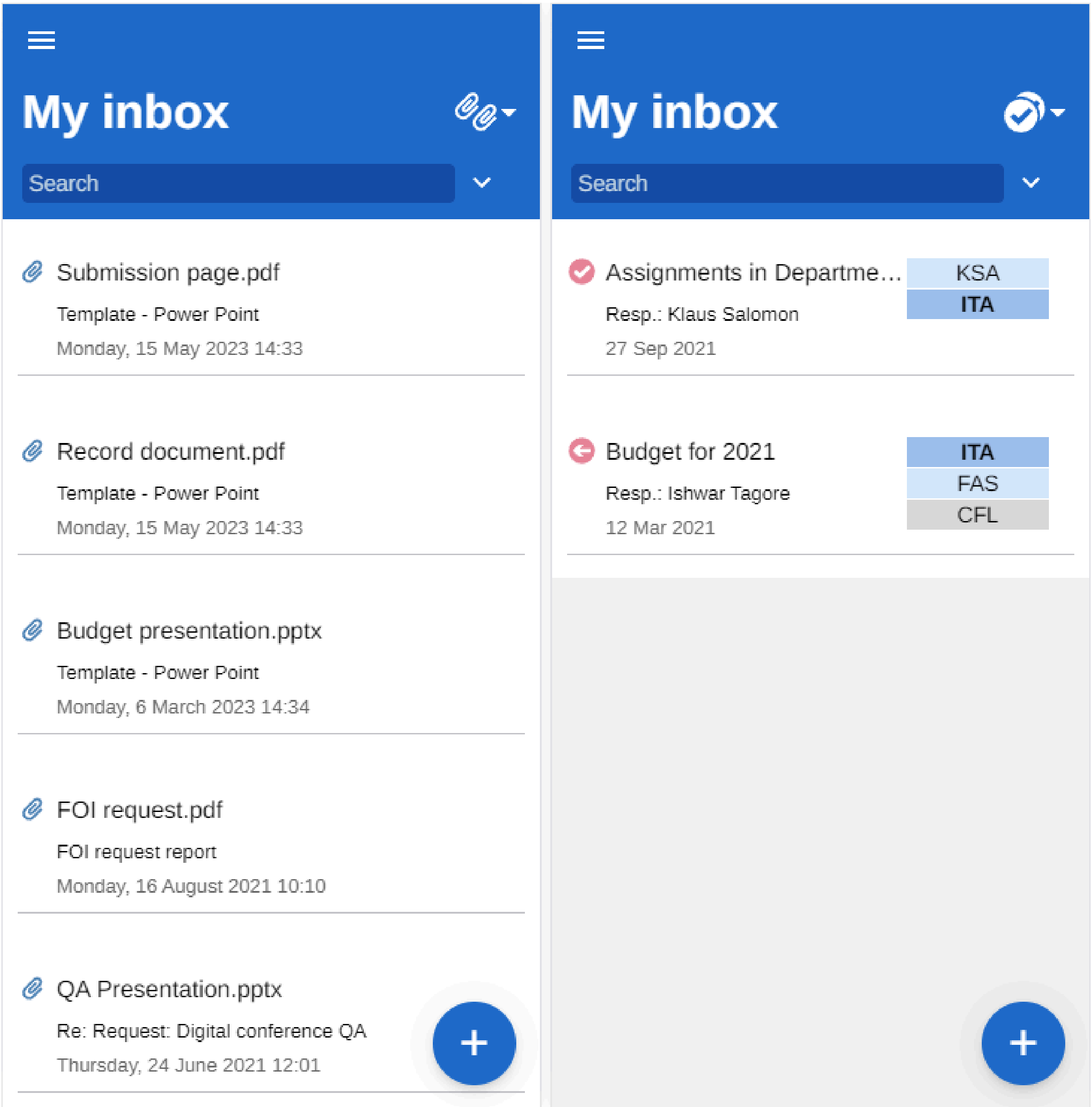


Figure 41. The document and approval views

Limitation to the number of displayed unread records

The F2 Touch app icon displays the number of unread records. No more than 99 unread records are shown, which is identical to the behaviour of F2 Desktop.

TIP	If your inbox is taking a long time to load, it may be due to the high number of displayed records. You can change how many records are shown in your personal settings.

Search in F2 Touch

The following section describes the search functions in F2 Touch. Searches in F2 Touch work the same way as in F2 Desktop.

Read more about searches in F2 Desktop.

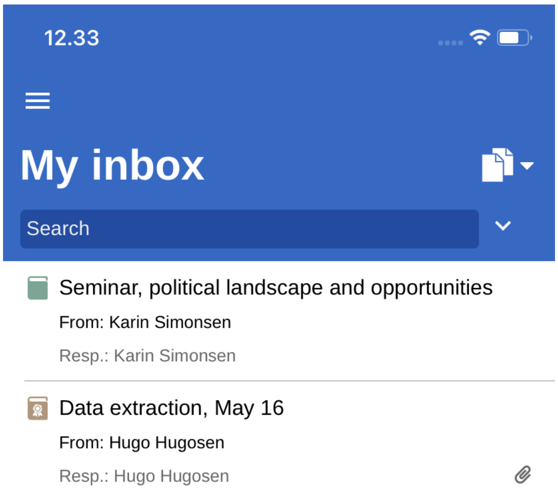


Figure 42. Search in a list

The search field is located above the result list. Use it to search in the current list.

F2 Touch will find record and case titles in the list that contain the entered search words. Tap ✓ to view other search options as well as filter options.

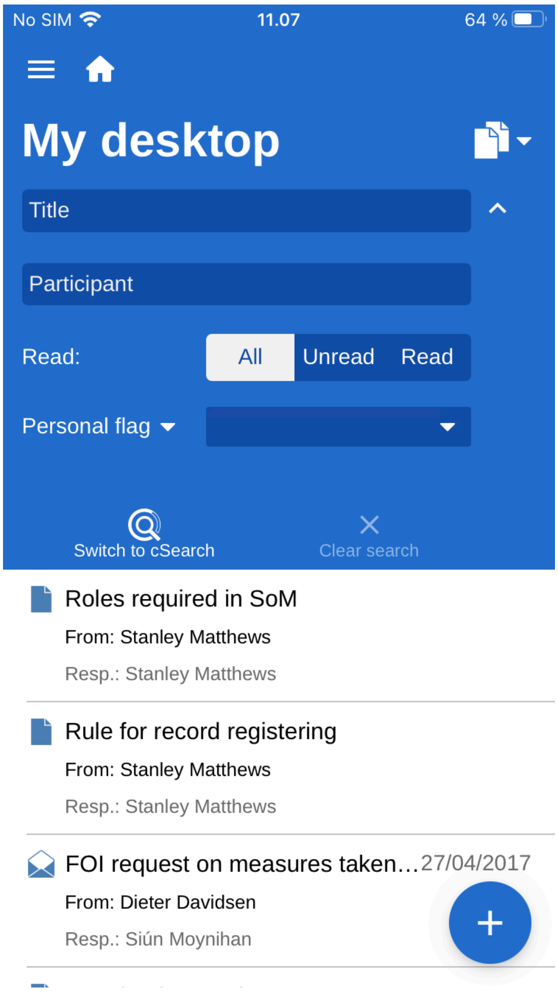


Figure 43. Expanded search options

Here you can search for:

- **Title** or parts of words that appear in the record or case title.
- **Participant**, i.e. records containing certain participants or units from the participant register.

NOTE	F2 Touch begins searching when you have entered two characters. It is possible to configure the number of characters that need to be entered before searching begins. Configurations are made in cooperation with cBrain.

The list can be sorted using the following filters:

- **All/Unread/Read**
- **Personal flag**, which filters records with the chosen flag.

Tap **cSearch** to search using this functionality. Read more about cSearch in F2 Touch.

If the expanded search options are hidden while one or more are in use, any active search criteria are displayed next to the search field.

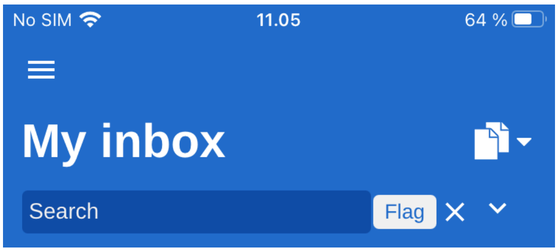


Figure 44. Search criteria

Clear the search by tapping **X** on the right of the search field.

Sort search results

Search results are sorted in chronological order, so that the most recently updated record is at the top of the result list.

All actions related to a record affect its placement in the result list. This applies to the lists “My archive”, “My desktop”, and “My inbox” along with “Inbox (Unit)”, “Archive (Unit)” and “Desktop (Unit)”. For example, changes to visible chats on a record are considered updates, thus affecting the placement of the record in the result list.

Search for records by their participants

It is possible to search for records on which a specific participant is involved. A participant is either a user or a unit from F2’s participant register. Enter the name of the participant in the “Participant” search field. This search yields records in which the participant is involved as e.g. the responsible user or sender.

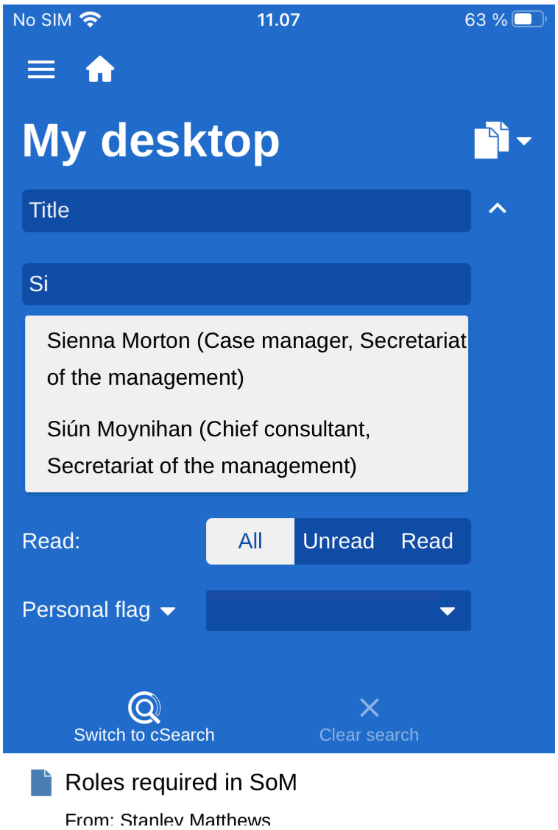


Figure 45. Search for a participant

In F2 Touch it is possible to search for records with deactivated participants. The name of a deactivated participant is displayed in italics with a grey font.

Records in F2 Touch

The following sections describe the different views and functions for records in F2 Touch.

Show record

Tap a record in a list to open the record window. From here you can work on the record document and any attached documents, chats, notes, etc.

If the record is attached to a case, navigate to the case by tapping the **case icon** in the blue ribbon at the top.

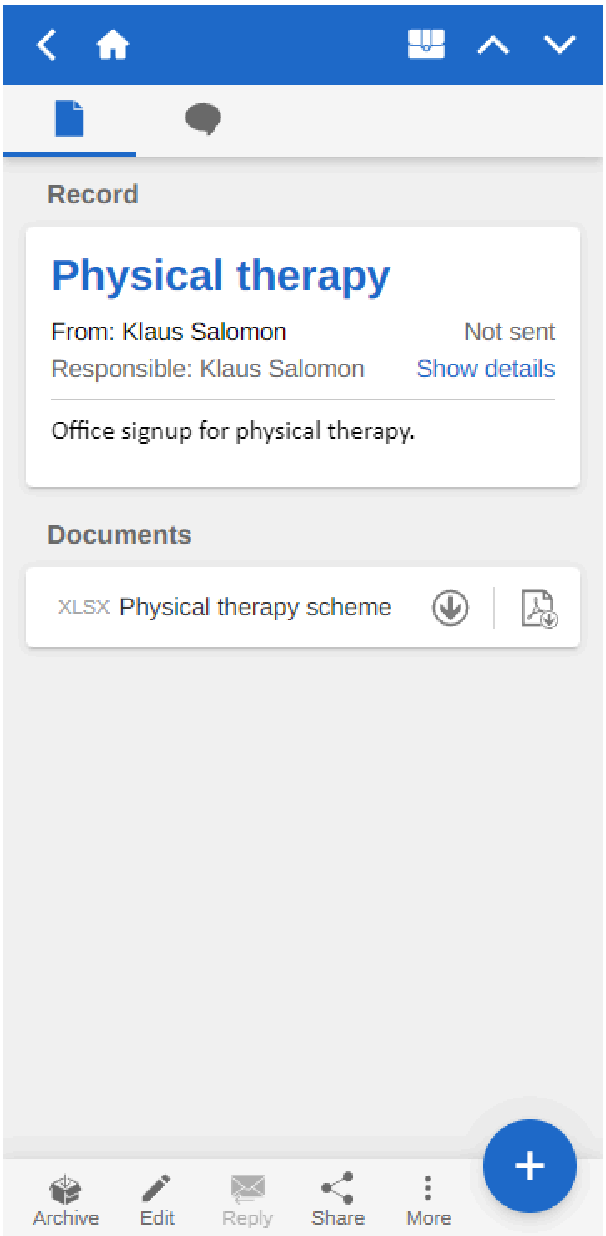


Figure 46. The record window

Navigate between the record document, chats, and notes using the upper grey ribbon. If the record contains an approval or a request, their icons are also displayed here.

The bottom grey ribbon contains a number of functions for working with the record.

Functions in the record window

The bottom of the record window contains a number of functions for working with the record.

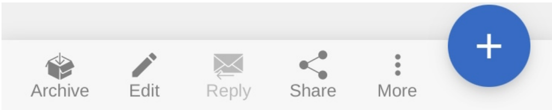
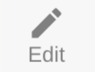
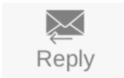
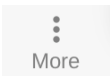


Figure 47. Functions in the record window

The functions are described in the table below. Your access rights to a given record determine which functions are available.

Icon	Menu item	Description
	Archive	Archives the record.
	Edit	Opens a sub-menu with the following options: • Edit record • Edit approval document • Edit approval • Change responsible • Set supplementary • Set keywords.
	Reply	Opens a sub-menu with the following options: • Reply • Reply all • Forward.
	Share	Opens a sub-menu with the following options: • Copy link to this record • Email as PDF • Approval document as PDF • Generate combined PDF.
	More	Opens a sub-menu with the following options: • Mark as unread • Delete record.

Tap the **add icon** + to perform the following actions on the record:

- New chat
- Chat all
- New note
- New approval
- New request

NOTE Menu items relating to approvals require the F2 Approvals add-on module. The new approval menu item is only visible if you have the necessary rights to create an approval on the record.

Show/hide details in the record window

Tap **Show details** to view and edit the following metadata:

- Responsible
- Letter date
- To/From
- Record ID
- Last updated
- Version (see the note below)
- Record location
- Record flag
- Personal deadline
- Unit control
- Unit flag
- Unit deadline
- Access
- Registered.

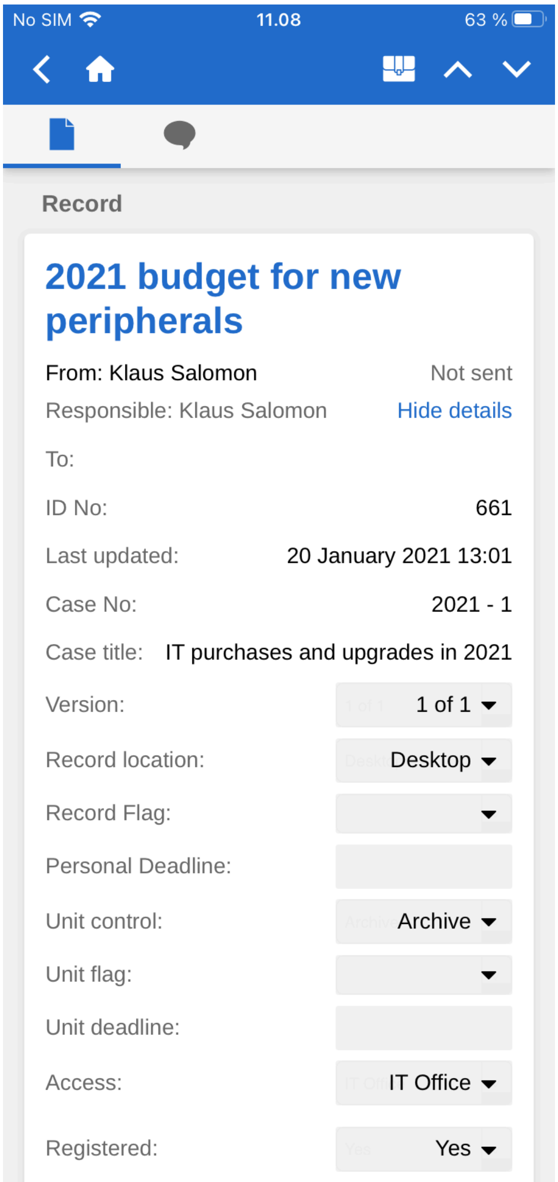


Figure 48. Record metadata

NOTE It is not possible to make changes to older versions of the record as in F2 Desktop.

Archive record

In F2 Touch it is possible to archive a record directly from the record window.

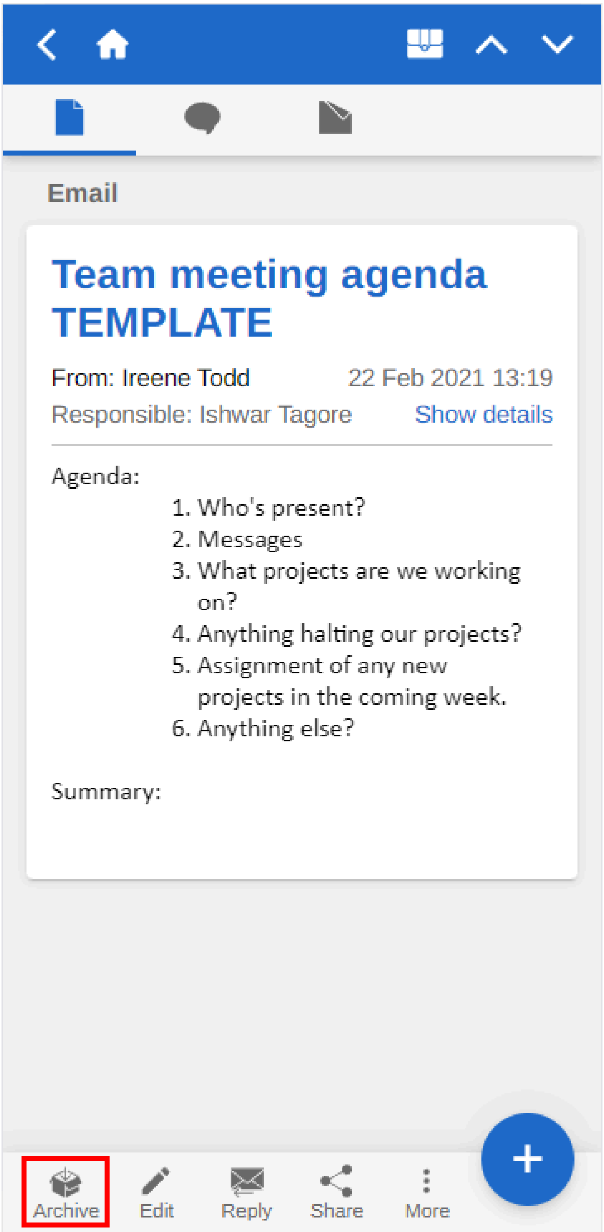
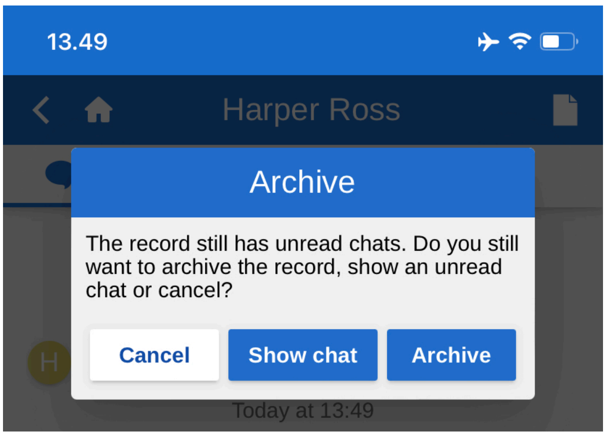


Figure 49. Archive record

Tap **Archive** in the bottom left corner of the record window to archive the record.

After the record has been archived, F2 displays the next record in the list.

Tapping **Archive** on a record with unread chats will display the “Archive” dialogue.



In the dialogue F2 Touch presents the following options: to archive the record despite its unread chats, to show the chats, or to cancel the action.

Undo action

In F2 Touch it is possible to undo certain actions on a record.

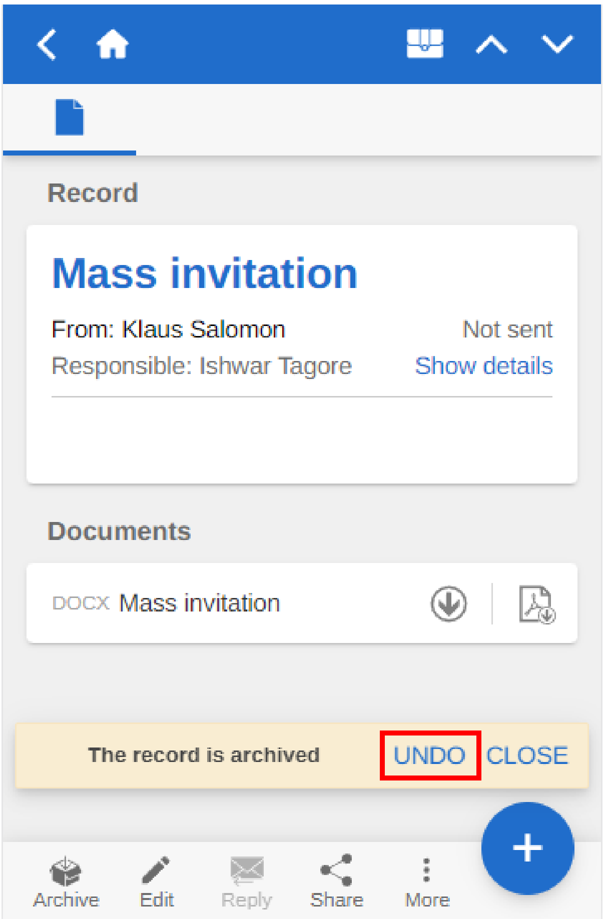


Figure 51. Undo "Archive record" action

An **UNDO** button appears at the bottom of the screen when the following actions are performed:

- Archive record.
- Delete record.
- Send record. Undoing will stop the record from being sent, but any changes to the record will be saved.

TIP Go to your personal settings to adjust how long the **UNDO** button is shown.

Allocate a flag by swiping

It is possible to allocate a flag to a record directly from the result list using a swipe action. Swipe left on the record to show the options **Delete**, **Set flag** and **Archive**.

Select **Set flag** to display the available flags at the bottom of the screen as shown in the figure to the right.

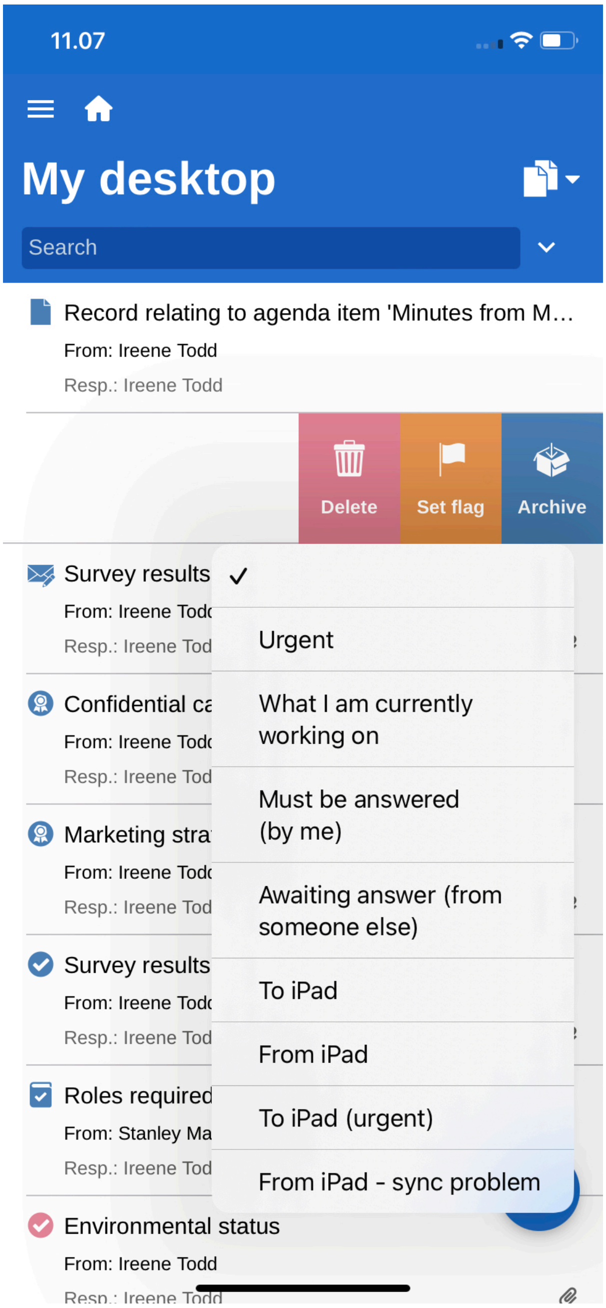


Figure 52. Allocate a flag directly from the result list

Personal flags can be set on personal lists, while unit flags can be set on unit lists.

Include participant in access restriction

If access to a record is restricted through the “Access restricted to” or “Case access restricted to” fields, an asterisk “*” appears in the “Access” field on the record.

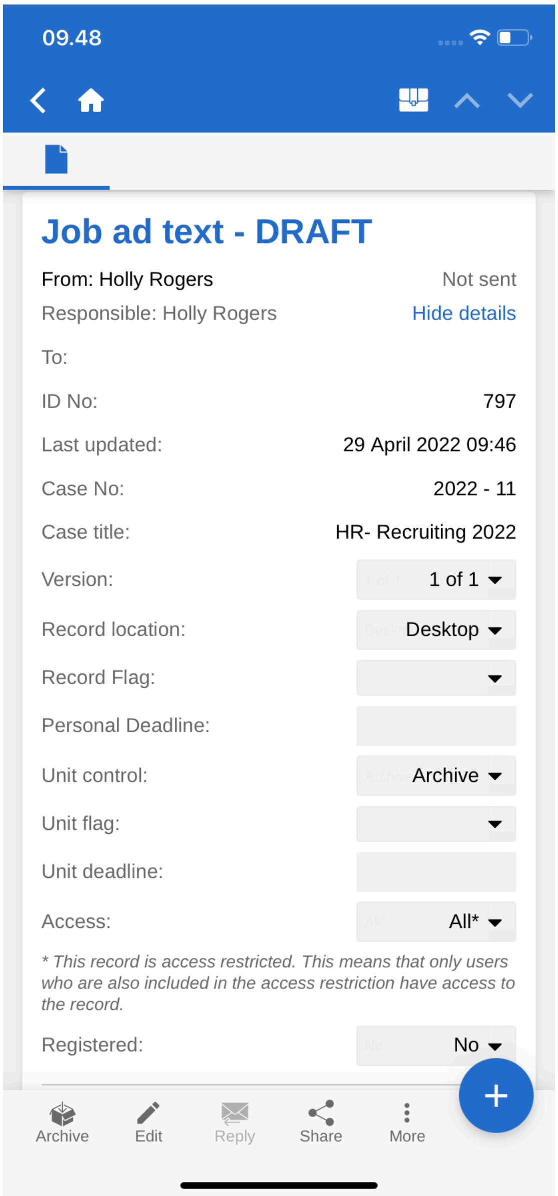


Figure 53. Information about access restriction

Internal participants can be given access to records that are access restricted.

It is possible to give a participant access to a record with an access restriction when performing the following actions in F2 Touch:

- Send a chat
- Add chat participant
- Save a record
- Attach record to a case
- Send a record
- Approval action.

If you attempt to share a record with internal participants who do not have access to the record, F2 suggests adding them to the record's access restriction.

The dialogue that appears makes it possible to add participants to the access restriction. If a participant is not added, they cannot see the record or the chat.

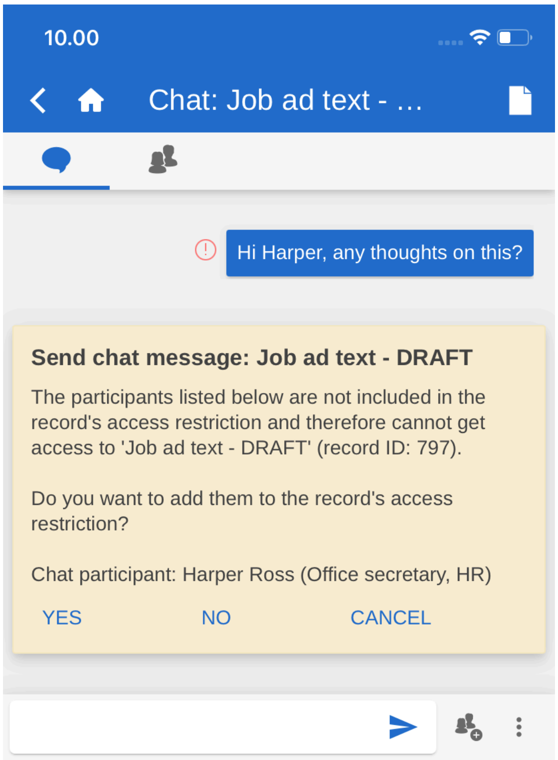


Figure 54. Include participant in the access restriction

Read more about access restrictions on records and cases.

Create email or record

Records can be created from every list in F2 Touch. To create a new record, tap the **add icon** + in the bottom right corner and then **Create email**. The menu item is named by its most regular use, as F2 Touch users often create records to send them as emails. If no recipient is added to the "To" field, the record is created as a regular record.

Enter a title for the new record. If you want to send it as an email, enter a recipient in the "To" field. Read more about sending emails from F2 Touch. Ignore the "To" field if you are not sending the record.

Tap **Add** in the "Documents" section to attach documents to the record.

You can assign the record to an existing or a new case in the "Case" section.

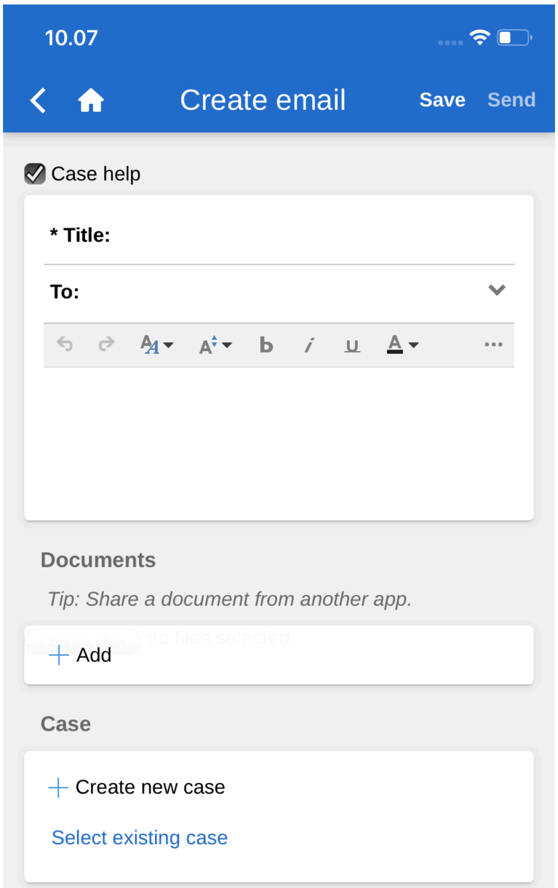


Figure 55. Create email/record

Tap **Save** to save the record or **Send** to send it as an email. If the “Case help” field is ticked, consider the case help dialogue’s suggestions before saving or sending the record.

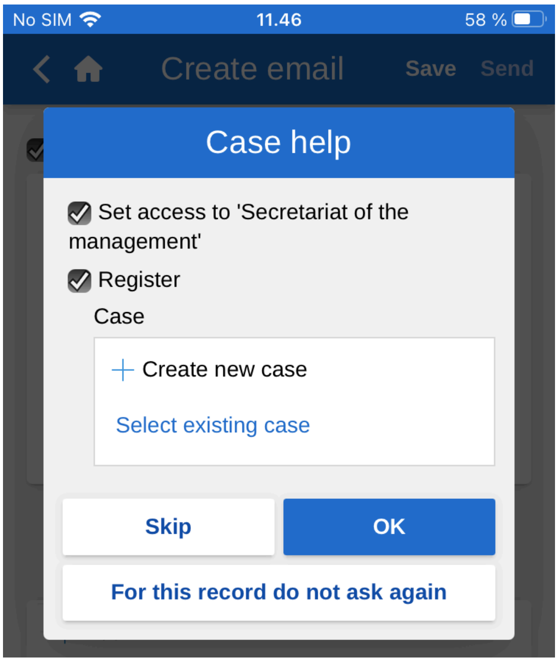


Figure 56. Case help

The case help in F2 Touch functions and appears similar to the case help in F2 Desktop. It also appears under the same conditions. Read more about the case help function.

Edit record

You can edit an existing record in F2 Touch if you have the rights to do so.

Set a record in edit mode by tapping **Edit**. Then select **Edit record**.

When the record is in edit mode, it is possible to edit its title, the record document, recipients (for emails), attached documents, and case association.

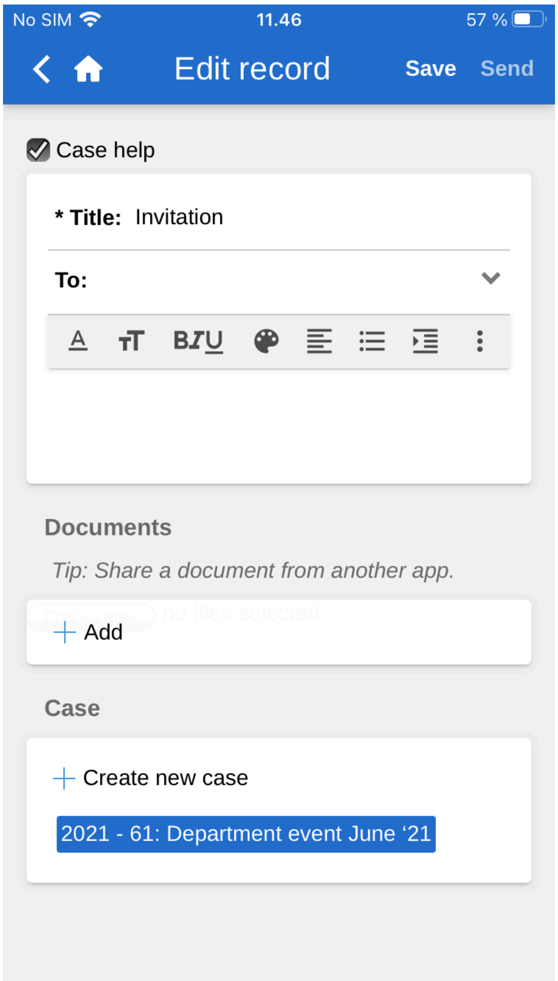


Figure 57. Record in edit mode

The functions of record document's toolbar are similar to those in F2 Desktop. Expand the toolbar by tapping the three dots to the right on the toolbar.

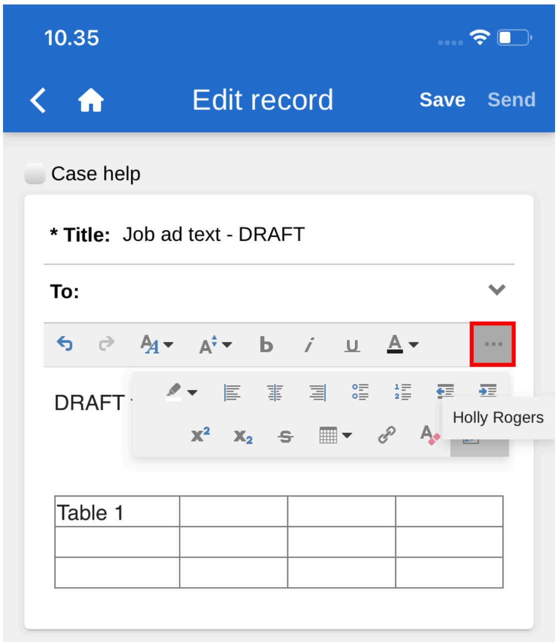


Figure 58. Expanded toolbar in a record document

When the record is in edit mode, you can also edit any attached documents. Documents can be added, edited, and deleted.

Add document

In F2 Touch it is possible to upload an attachment of up to 40 MB. This may be a document or image from the device's file system.

NOTE This function is available in F2 Touch for iPhone, iPad or web browser.

Tap **Edit record** in the bottom grey ribbon to set the record in edit mode.

Tap **Add** in the "Documents" section to open the device's file system.

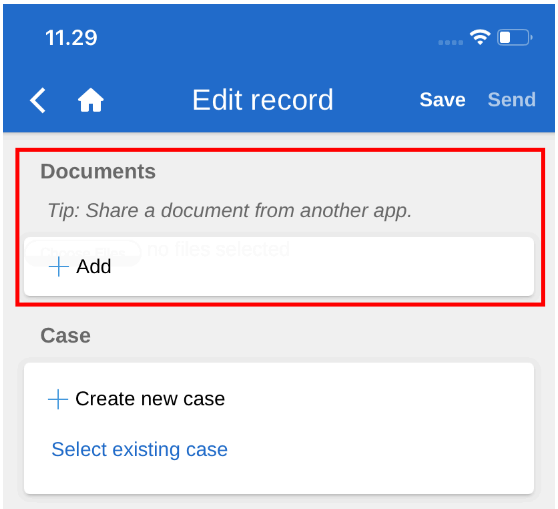


Figure 59. Add document

The following options are available when using an iOS device:

- Take a photo or record video.
- Transfer one or more photos from the image library.

- Transfer a file from another app using the “Browse” feature. Browse through all files saved on the device.

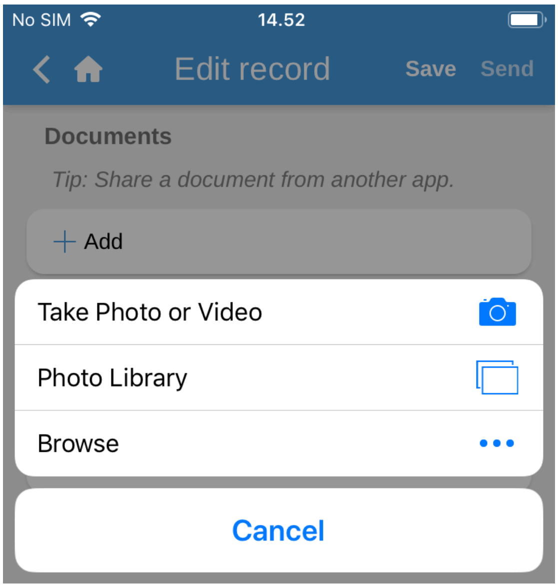


Figure 60. The file selector on an iPhone

Then select a file from the device’s system.

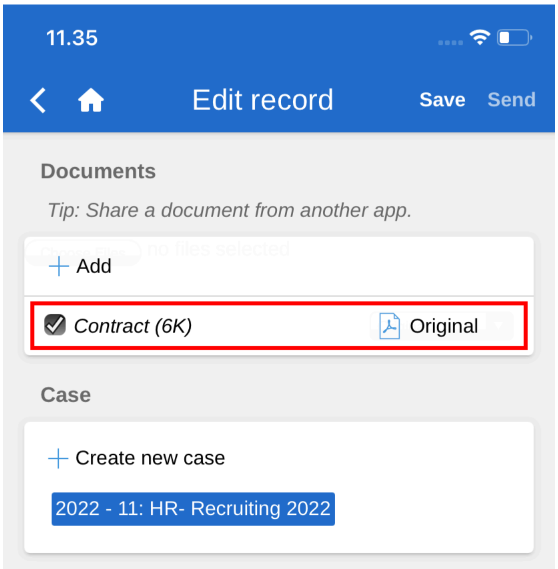


Figure 61. Document attached to record

Tap **Save** to attach the selected file to the record.

Additionally, you can add documents from other apps by opening the document in F2 Touch, after which the document will be associated with the currently open record.

Enter edit mode on the record in F2 Touch. Tap **document interaction** (iOS)/**share function** (Android) in the app where the document was edited. Select **F2 Touch**. The document is then sent to F2 Touch and can be found in the record’s "Documents" section.

Undo add document

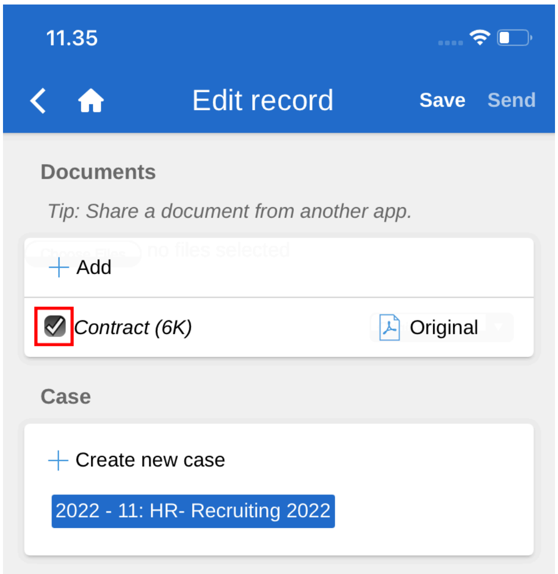


Figure 62. Undo attachment by unticking a file's box

Edit document

In F2 Touch you can edit attached documents in two ways:

- When accessing F2 Touch from a browser, you can add a document from your device’s file system. This will update the record’s existing attached document.
- When accessing F2 Touch from a mobile device, you can open the document in another app to edit and then re-import it to F2 Touch. The process differs depending on whether you are using iOS or Android.

Update document from browser

You can update an attached document by replacing it with an existing file from your device’s file system. This will overwrite the existing document on the record.

Tap **Edit record** in the bottom grey ribbon to enter edit mode.

To update an attached document, tap **Update** in the “Documents” section. This will open the unit’s file system from which the desired file can be selected.

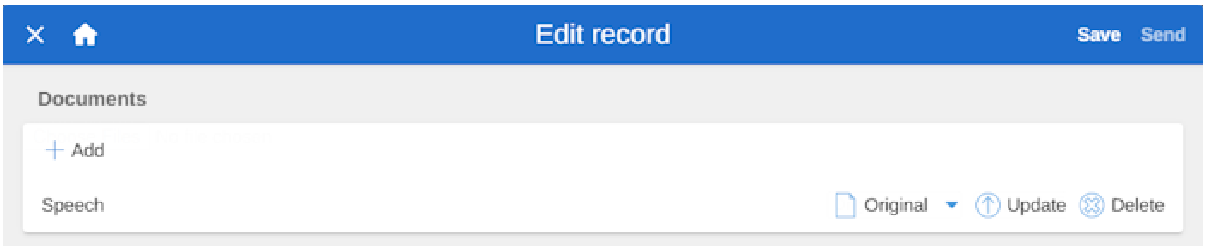


Figure 63. Update attached document

Once the file has been selected, tap **Save** to attach it to the record. The new file replaces the existing attachment.

To cancel the replacement, remove the tick next to the file before tapping **Save**.

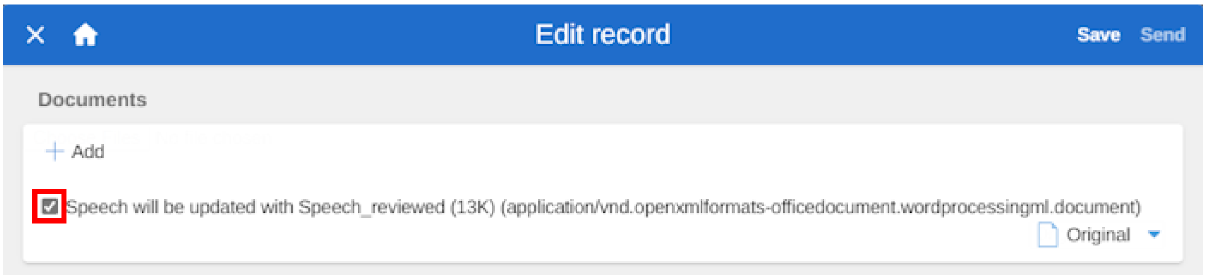


Figure 64. Undo add document

Edit document in another app - iOS

You can edit an attached document by opening it in another app, such as Word.

First, open the document in F2 Touch by tapping its title. The record must be in read-only mode. Then tap the **document interaction icon** . From here, select the app in which you want to edit the document. Save the document when you have edited it.

To update the document in F2 Touch, tap the **document interaction icon** in the other app. Select **F2 Touch**. The document is then sent back to F2 Touch. A dialogue asks you to confirm that you want to update the attached document.

Update document edited in another app - iOS

You can update an attached document that you have edited and saved in another app.

Enter edit mode on the record in F2 Touch. Tap the **document interaction icon** in the app where you edited the document. Select **F2 Touch**. The document is then sent back to F2 Touch. The document title indicates that the document will be updated. Save the record.

Edit document in another app - Android

You can edit an attached document by opening it in another app, such as Word.

First, open the document in F2 Touch by tapping its title. The record must be in read-only mode. The device’s share function opens. From here, select the app in which you want to edit the document. Save the document when you have edited it.

To update the document in F2 Touch, tap the **share function** in the other app. Select **F2 Touch**. The document is then sent back to F2 Touch. A dialogue asks you to confirm that you want to update the attached document.

Update document edited in another app - Android

You can update an attached document that you have edited and saved in another app.

Enter edit mode on the record in F2 Touch. Tap the **share function** in the app where you edited the document. Select **F2 Touch**. The document is then sent back to F2 Touch. The document title indicates that the document will be updated. Save the record.

Select document format

Set the record in edit mode. Go to the “Documents” section to select document format. It is both possible to choose the format for all documents attached to the record or for each document.

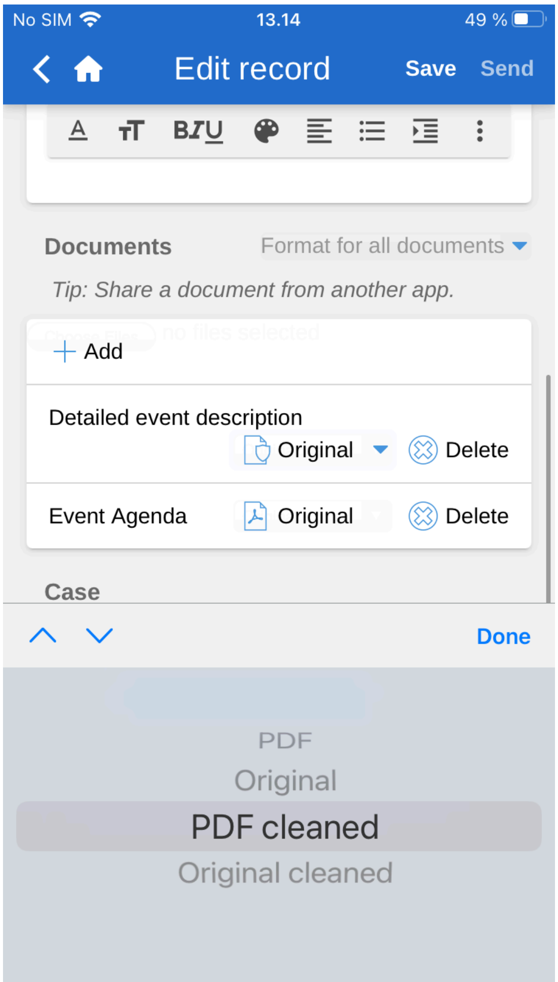


Figure 65. Format selector

Select one of the two options to display a drop-down menu. From here, select a format.

The following format options are available:

- PDF
- Original
- PDF cleaned (requires the F2 Metadata Remover add-on - documentation available in Danish)
- Original cleaned (requires the F2 Metadata Remover add-on - documentation available in Danish).

F2 Touch’s default format is the one you have selected in your personal setup in F2 Desktop.

Delete document

You can delete an attached document from a record in the following way.

Go to edit mode. Tap **Delete** next to the attached document.

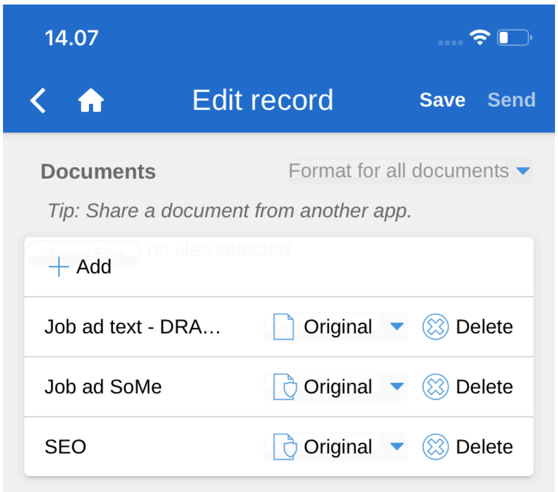


Figure 66. Delete document

When you tap **Delete**, the title of the document is shown in strikethrough text.

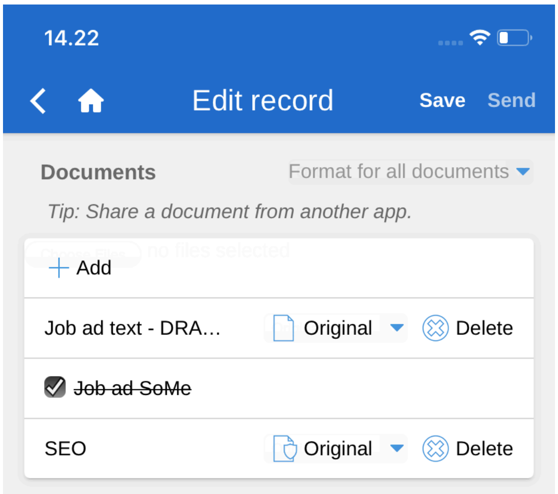


Figure 67. Tap Save to delete a document with a strikethrough title

Share photo or URL

You can share photos from your Photos app and URLs from the Safari browser to F2 Touch on iPhone and iPad.

In Photos or Safari, open the photo or website you want to share. Tap **Document interaction** and select **F2 Touch**.

Figure 68. Share URL from Safari with F2 Touch

F2 Touch creates a new record. If you have shared a photo, it is added to the "Documents" section of the newly created record. If you have shared a URL, the newly created record receives the title of the URL's website and the URL is added to the record document.

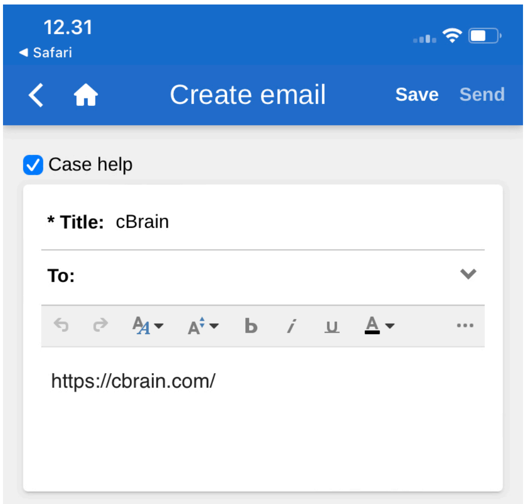


Figure 69. A newly created record based on a shared website

Communication in F2 Touch

F2 Touch offers nearly all the communication options from F2 Desktop. You can create emails, chats, notes, and annotations. Additionally, you can create requests and approvals.

If a record contains a chat, note, request, approval, or annotation, an icon representing the communication type is shown on the upper grey ribbon. Tap e.g. the chat icon to navigate to the record's chats. A blue dot next to a communication icon indicates that you have not read the latest message or update.

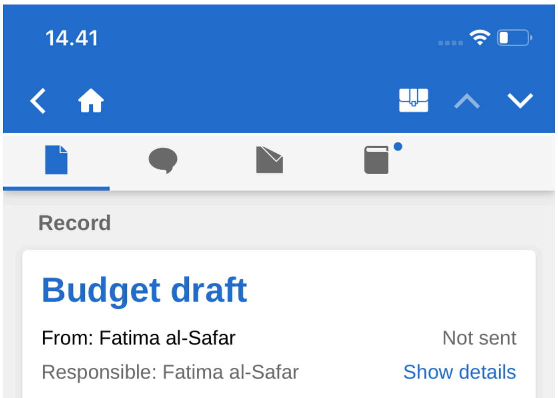


Figure 70. Communication on the record

Email

You can send, forward, and reply to emails in F2 Touch.

Send email

Enter a recipient in the "To" field. As in F2 Desktop, F2 Touch then searches the participant register for participants matching the entered data. The same applies to the "Cc" and "Xbc" fields.

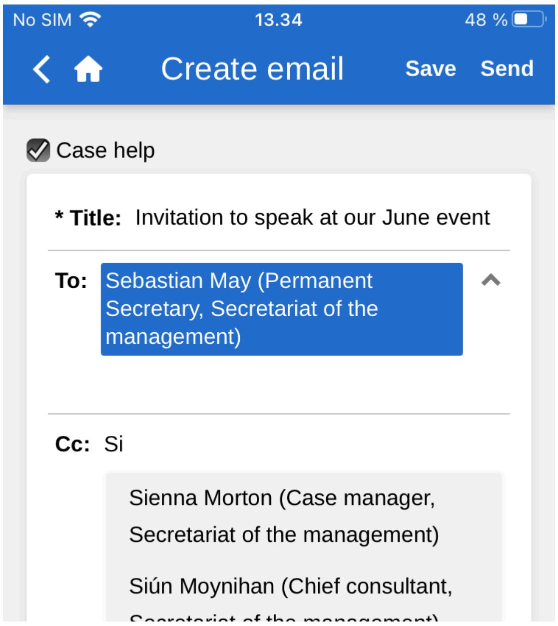


Figure 71. Send email

Tap **Send** to send the email.

Secure send

In F2 Touch it is possible to use the “Secure send” configuration.

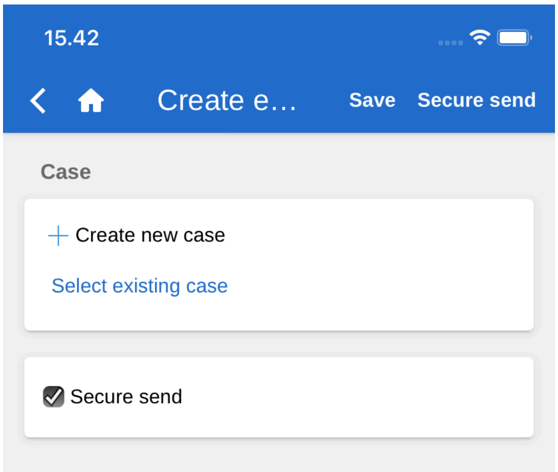


Figure 72. Secure send

To send securely, tick the “Secure send” box at the bottom of the record. The “Secure send” box is only visible when a participant has been entered in the “To” field.

“Secure send” functions the same way in F2 Touch as in F2 Desktop.

Tap an email address to create a new email

Tap an email address link in a record document to create a new email. The new email is created with the email in the “To” field.

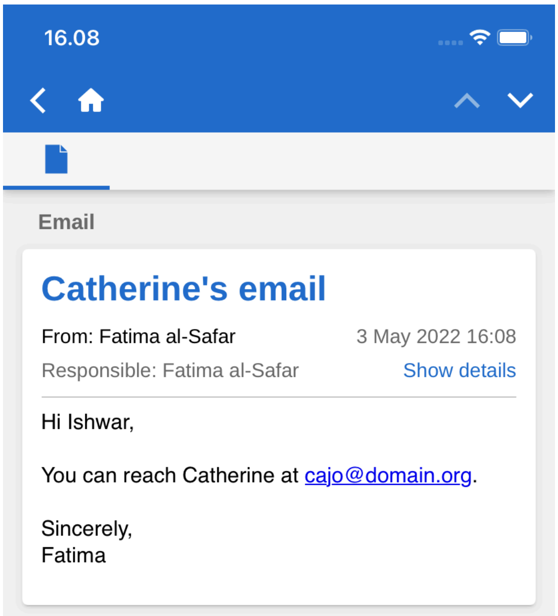


Figure 73. An email address in the record document

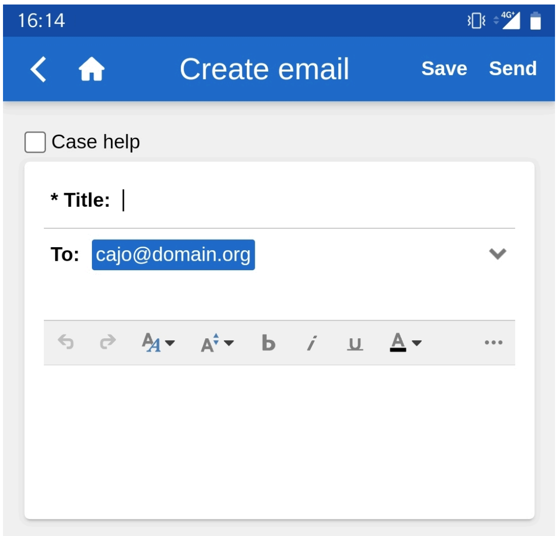


Figure 74. A new email with the email address as recipient

Chat

You can send and receive chats in F2 Touch.

Create chat

Tap the **add icon** + and select **New chat** to open the chat window. Selecting **Chat all** adds all email related participants to a new chat, i.e. sender, recipient(s), and any Cc and Xbc recipients.

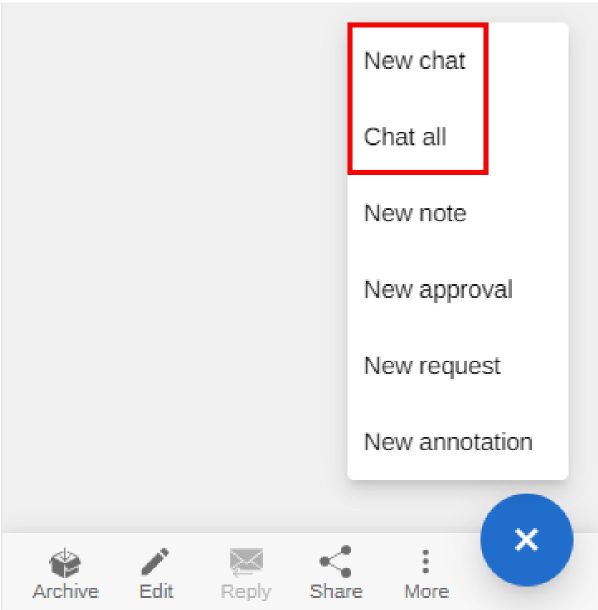


Figure 75. Create chat

The figure below provides an overview of the functions available in a newly created chat. The functions are described in further detail below.

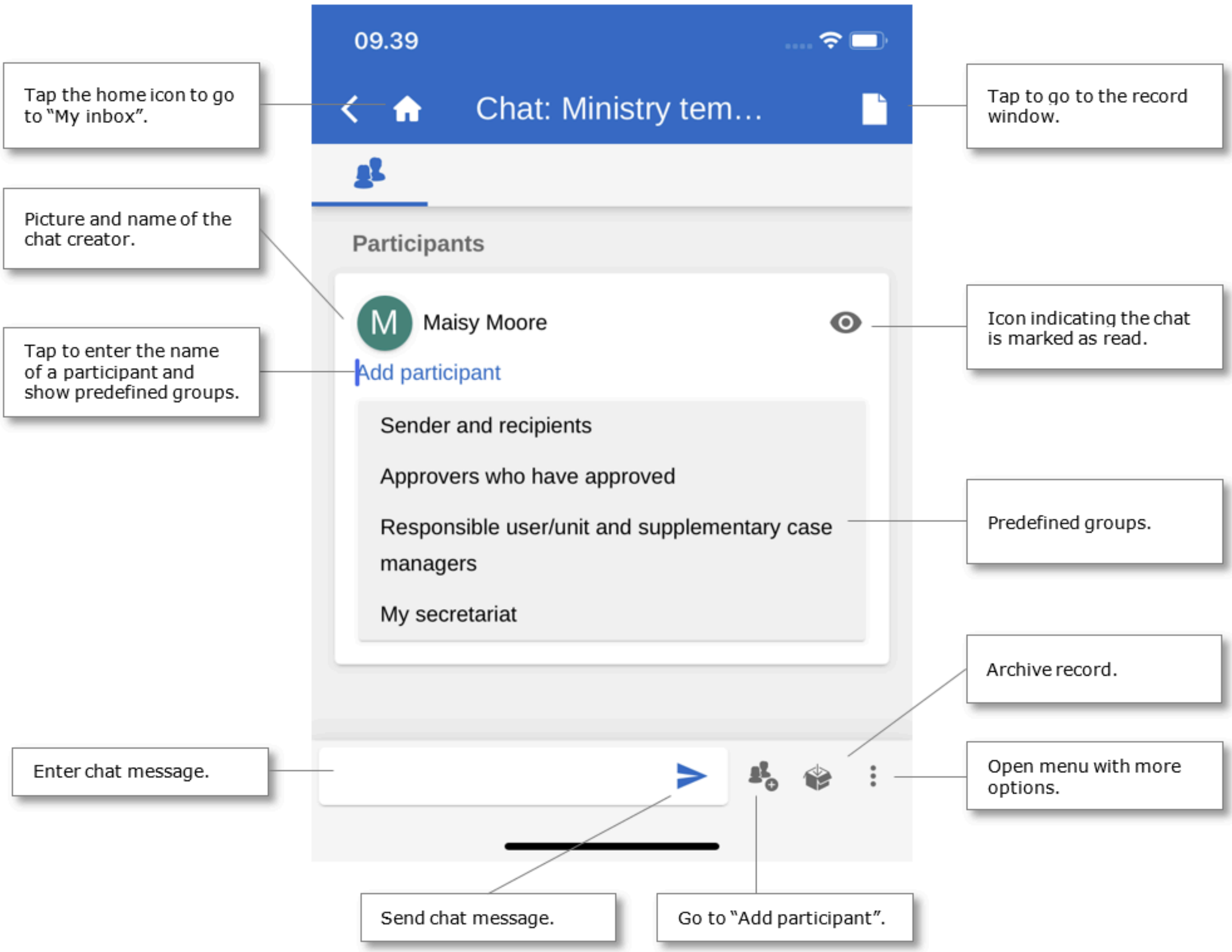


Figure 76. Newly created chat

Tap the **Add participant** field in the chat window to enter the name of a chat participant. Just as in F2 Desktop, F2 Touch suggests participants from the participant register matching the entered name.

Add a group of predefined chat participants

Tapping **Add participant** also displays a drop-down menu containing a number of predefined chat groups. Tap a group to add its users to the chat. The predefined chat groups contain users who are involved on the record in different ways. The chat groups are as follows:

- "Senders and recipients" (corresponds to the "Chat all" function).
- "Approvers who have approved" (requires the F2 Approvals add-on).
- "Responsible user/unit and supplementary case managers".
- "My secretariat" (requires the F2 Gateway Approvals add-on).

Tap a group's name to add its users.

Send chat

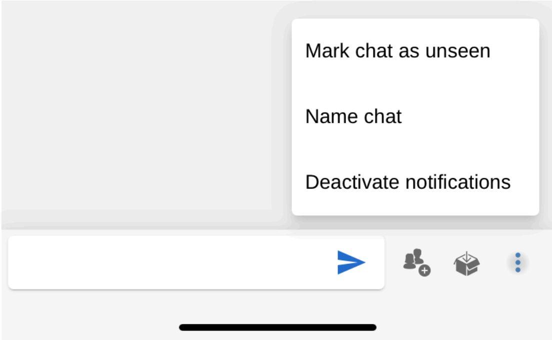


Figure 77. The chat window's bottom grey ribbon and menu

The bottom grey ribbon also contains the three following functions:

- Add participants to chat.
- Archive record.
- Menu.

The menu offers the following options:

- Mark chat as unseen
- Name chat / Edit chat title
- Toggle notifications
- Toggle automatic deletion (if configured)

Read more about chat functions and available configurations.

Open chat

You can open a chat by navigating to the chat message overview. You can also tap the **chat icon** next to a record in the result list.

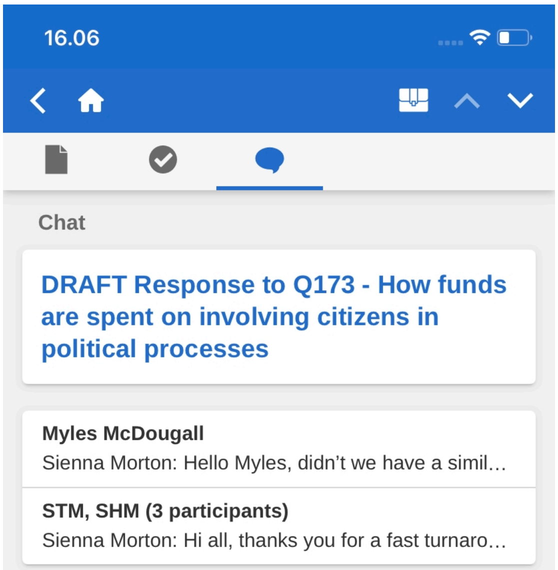


Figure 78. Chat overview

A blue dot appears with the chat icon for new chats and chats with unread messages.

Chat participant status and read-marking

The participants tab found on both chats and notes shows information about each participant. This includes their picture or initial letter, their status (e.g. “online”), and their out of office information. The participants tab shows an eye icon next to a participant if they have read all messages in the chat. Chats with more than two participants show the participants' initials and the total number of participants in their title.

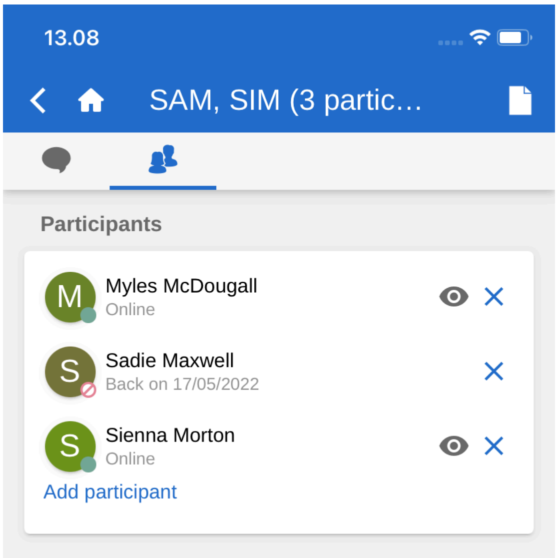


Figure 79. The participants tab found on chats and notes

The chat window shows information about the participants as well.

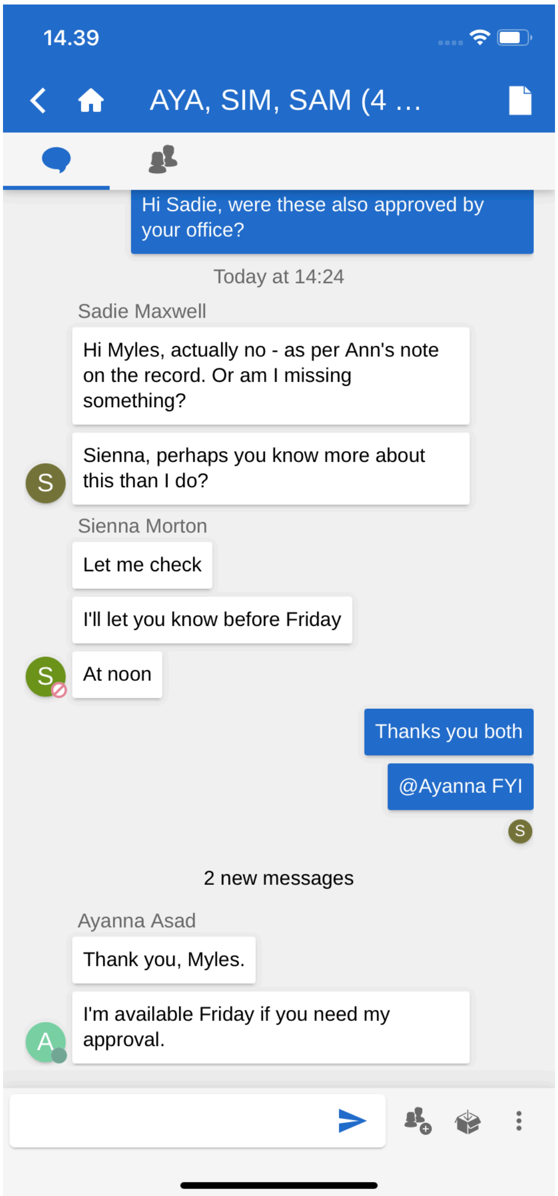


Figure 80. Status and last read message indicated in the chat window

As on the participants tab, a participant is depicted with their picture or initial letter, and their status is shown.

In contrast to the participants tab, the chat window shows exactly how far each participant has read in the chat. Below a participant's last read message, their initial letter or picture appears.

Go to unread chat messages

Longer chats may contain more messages than the chat window can show on one screen. Navigate to the first unread message in either direction of a longer chat with **Jump to**. "Jump to" appears regardless of the user's current position in the chat.

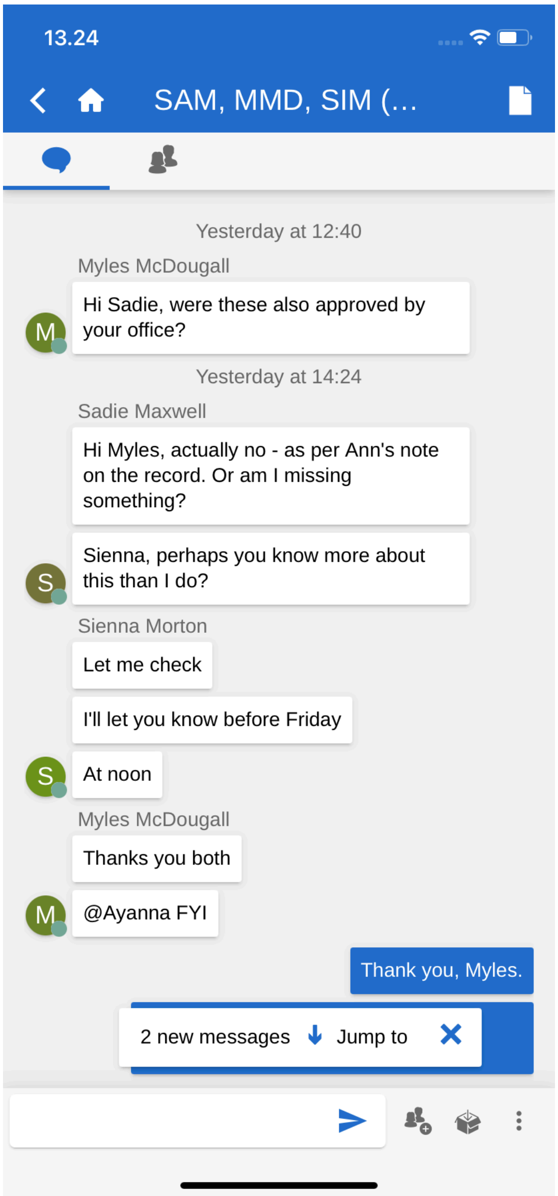


Figure 81. Jump to new messages

Note

You can create and open notes in F2 Touch.

Create note

Tap **New note** to add a note to the record and open the note window.

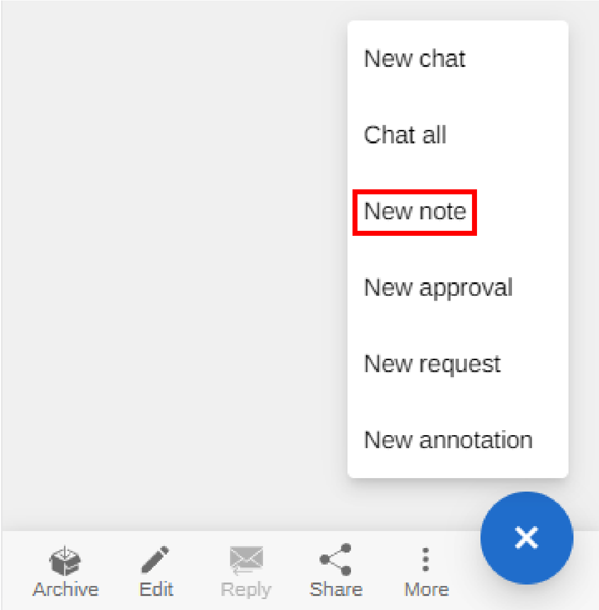


Figure 82. Create note

Note window functions

In the top ribbon the user can navigate between viewing the note participants and the note text.

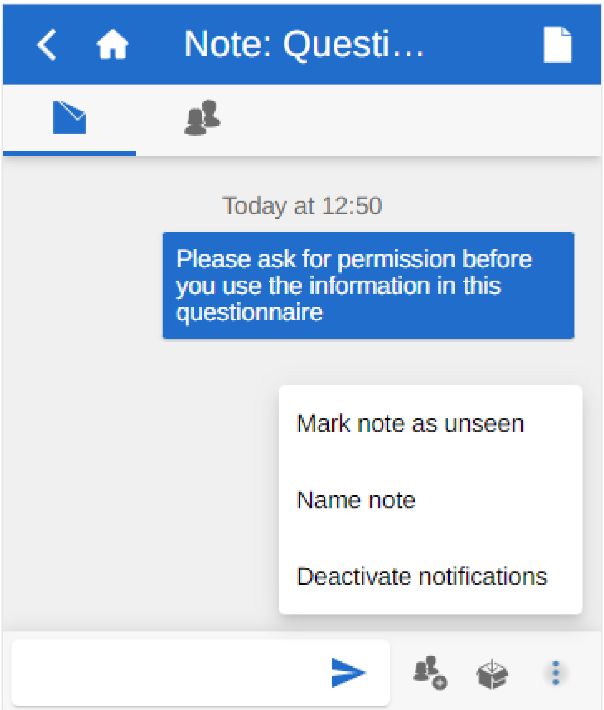


Figure 83. Note window functions

The bottom ribbon contains the following functions:

- Enter note text.
- Add note participants.
- Archive record.
- Menu.

- Mark note as unseen.
- Name note/Edit note title.
- Toggle notifications.

Read more about note functions.

Open note

You can open a note on a record by navigating to the notes overview. You can also use the note icon next to a record in the result list.

If a note is unread or it has unread messages, a blue dot appears with the note icon.

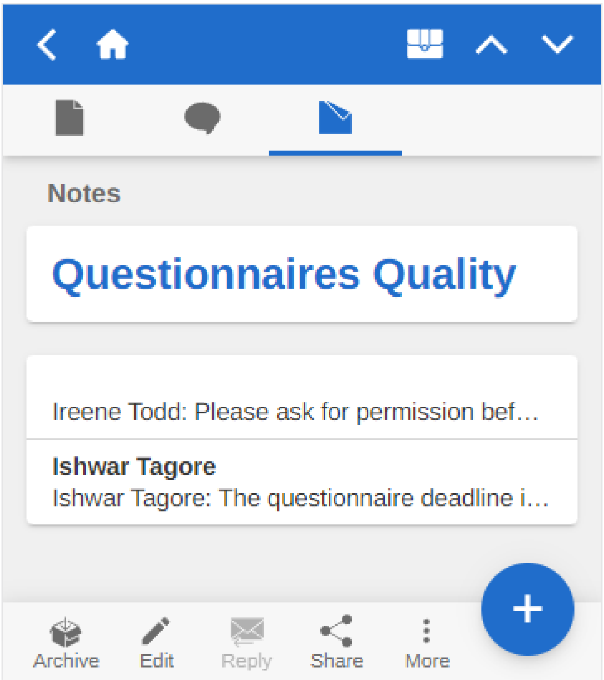


Figure 84. Notes overview

Annotation

You can create and open annotations in F2 Touch.

Create annotation

Tap the **add icon** and select **New annotation** to create a new annotation and open the annotation window.

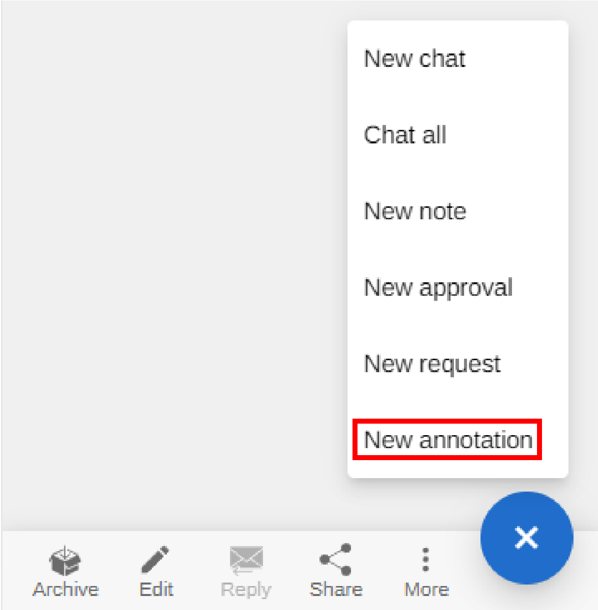


Figure 85. Create annotation

Similarly to F2 Desktop, it is possible to select an annotation type and add a description when creating an annotation.

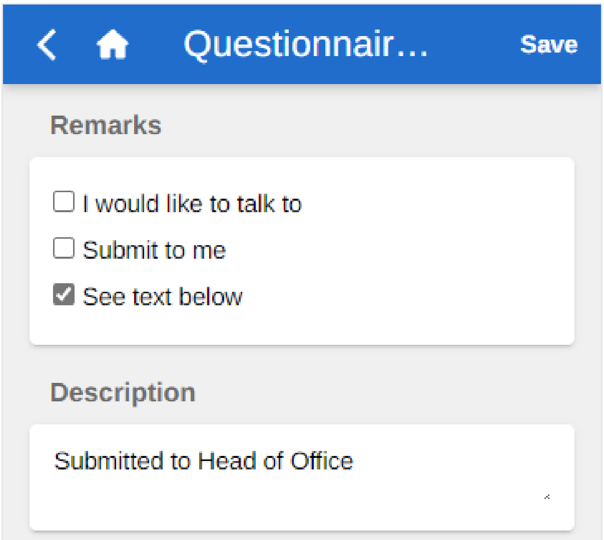


Figure 86. Newly created annotation

Tap **Save** in the upper right corner to save the annotation. It will then be visible on the record.

Open annotation

You can open annotations from the “Annotations” header.

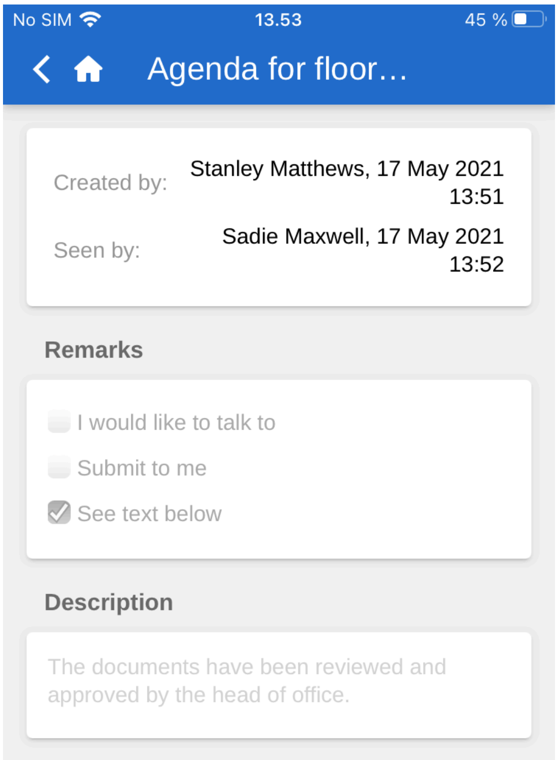


Figure 87. A "Seen" annotation

Here an annotation must be marked as "Seen" before a case can be completed. This functionality follows the default from F2 Desktop.

Reply to or archive chats and emails through push notifications

It is possible to answer a chat or archive an email or a record with a chat directly from a push notification on both iOS and Android.

NOTE	The exact method of opening a push notification depends on the device's operating system.

Reply to chat

When you receive a push notification regarding a chat on a locked screen, you can hold your finger on the notification to open the **Archive** and **Reply** shortcuts.

You can also swipe right and tap **Open** to open the chat window.

Tap **Reply** to reply to the chat without opening F2 Touch. Tap **Send** and unlock the device to send the reply.

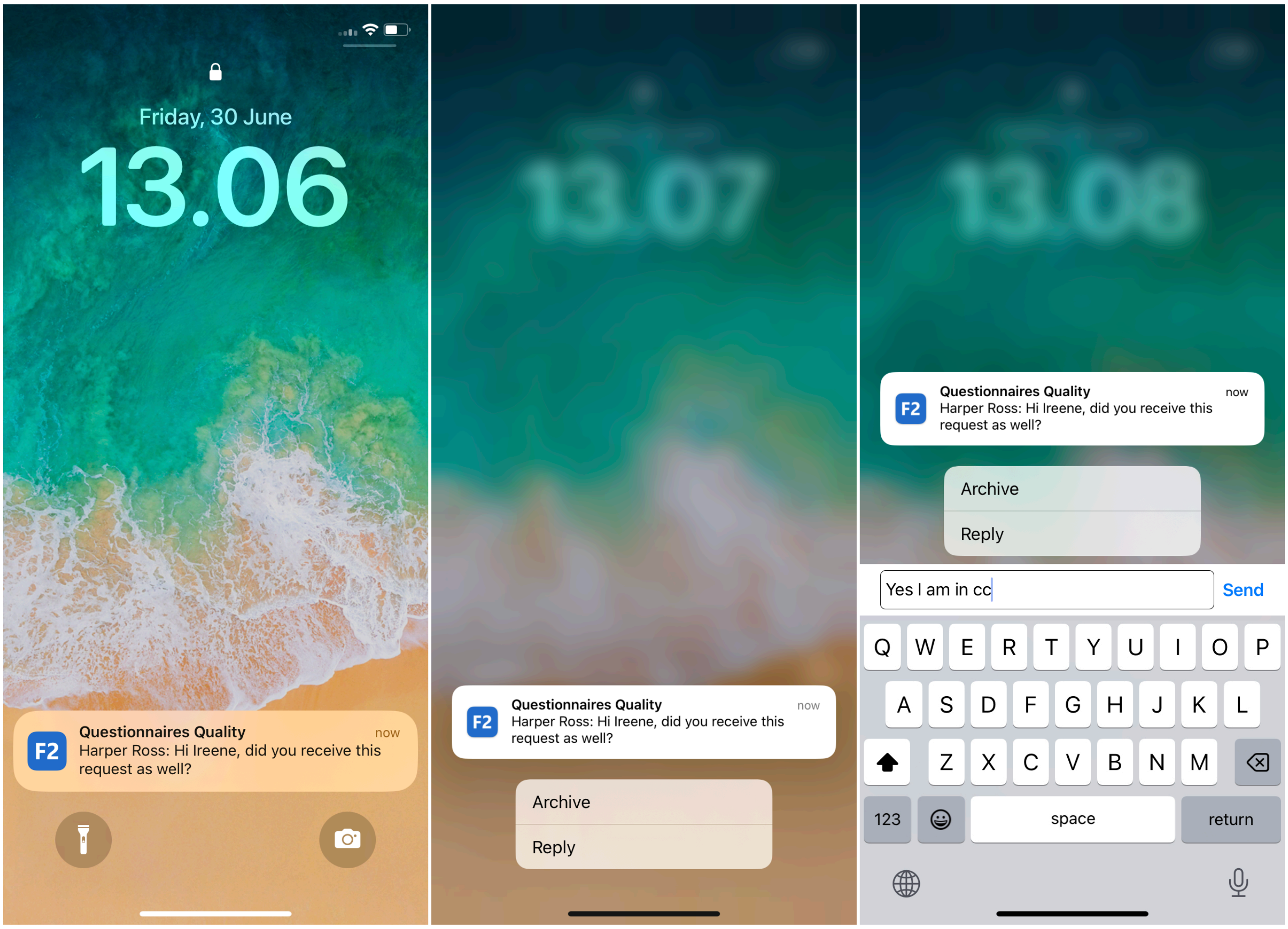


Figure 88. Push notification – Chat

Tap **Archive** to archive the record containing the chat.

NOTE A user with the "User administrator" privilege can log out another user of all F2 sessions. This will also delete the push notifications of the logged-out user.

Reply to email

When you receive a push notification regarding an email on a locked screen, you can hold your finger on the notification to open the **Archive** and **Reply** shortcuts.

You can also swipe right and tap **Open** to open the email.

Tap **Reply** to open the "Reply" dialogue in F2 Touch. Tap **Send** to reply to the email.

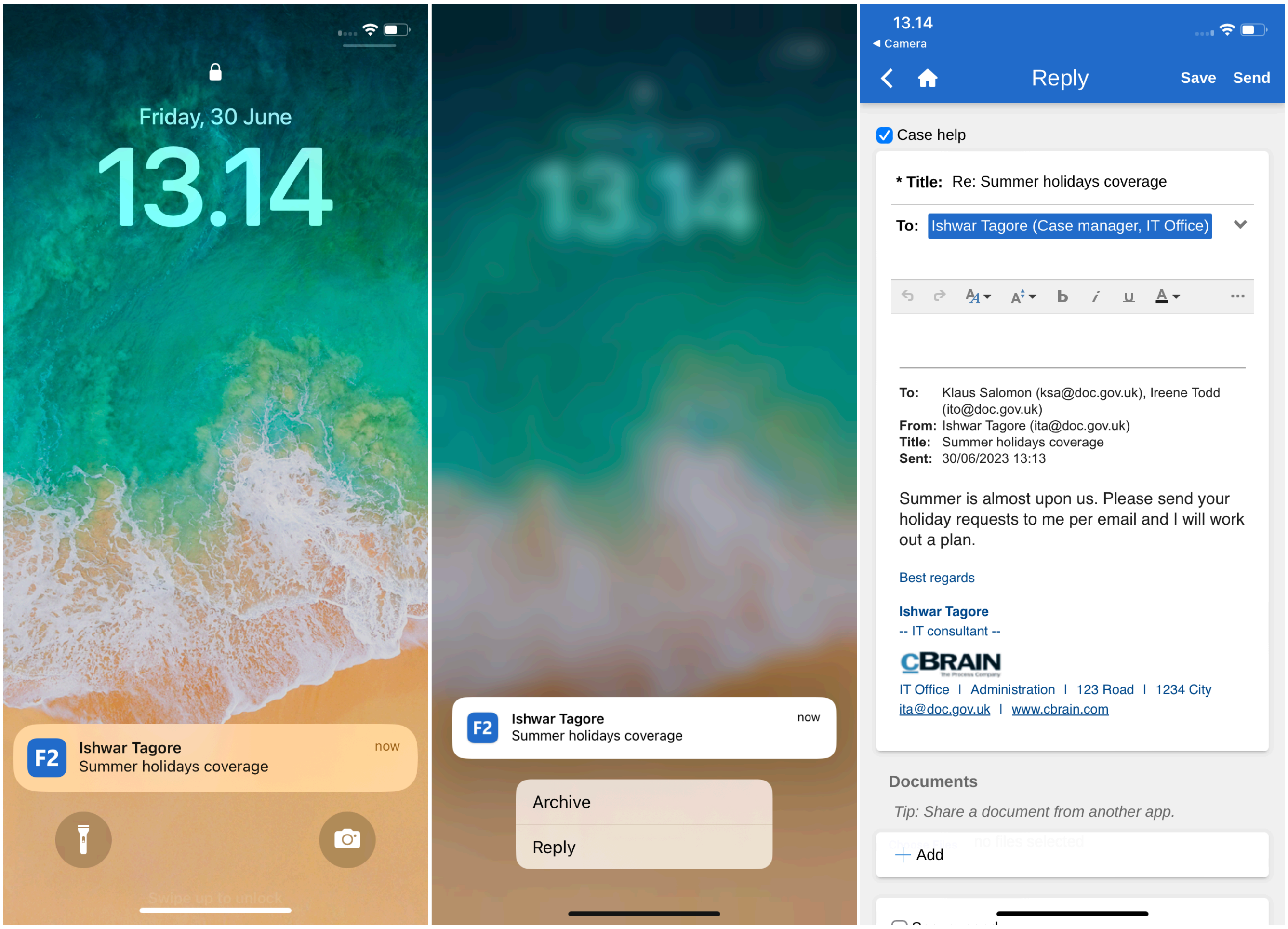


Figure 89. Push notification – Email

Tap **Archive** to archive the email.

NOTE A user with the "User administrator" privilege can log out another user of all F2 sessions. This will also delete the push notifications of the logged-out user.

Cases in F2 Touch

In F2 Touch it is possible to navigate between the different records on a case as well as adding a record to an existing case.

A case icon is shown in the blue ribbon if the record is attached to a case.

Tap the **case icon** to view the case along with a list of its associated records.

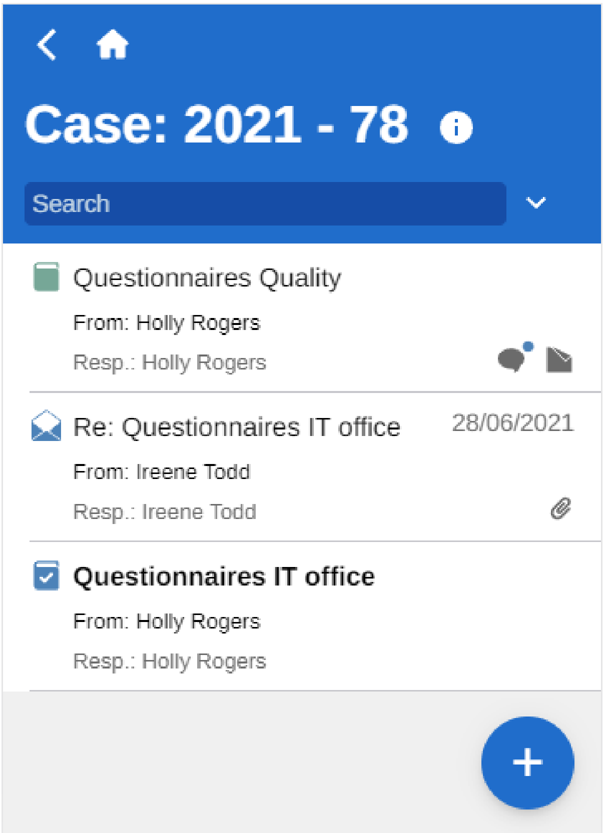


Figure 90. View the case's records

As in F2 Desktop, there are limited options for editing a completed case. This default behaviour can be disabled in cooperation with cBrain.

Create new record from case

You can create a new record from a case.

Tap the **add** icon and select **Create email**.

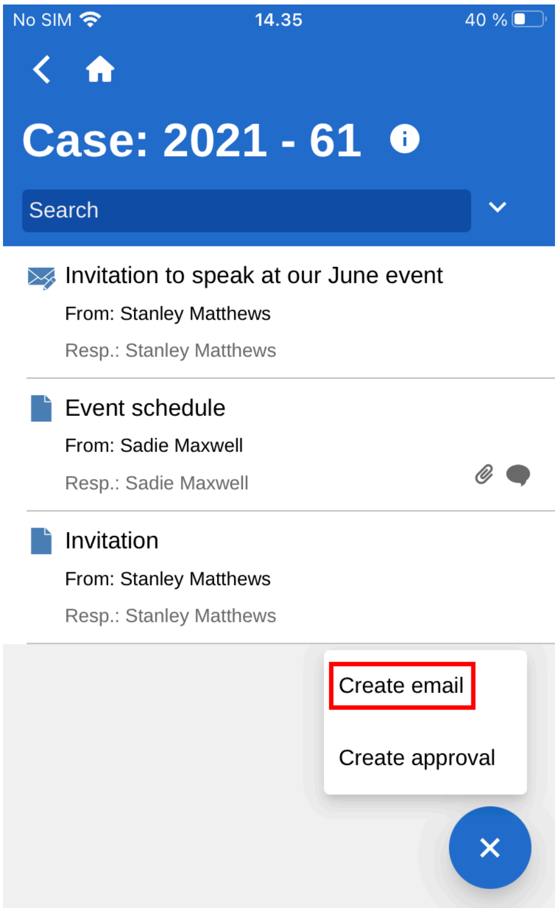


Figure 91. Create new record on a case

NOTE The **Create email** function is used for creating both emails and records. If no recipient is added in the "To" field, F2 creates a regular record.

Tick the "Use case" box at the bottom of the newly created record.

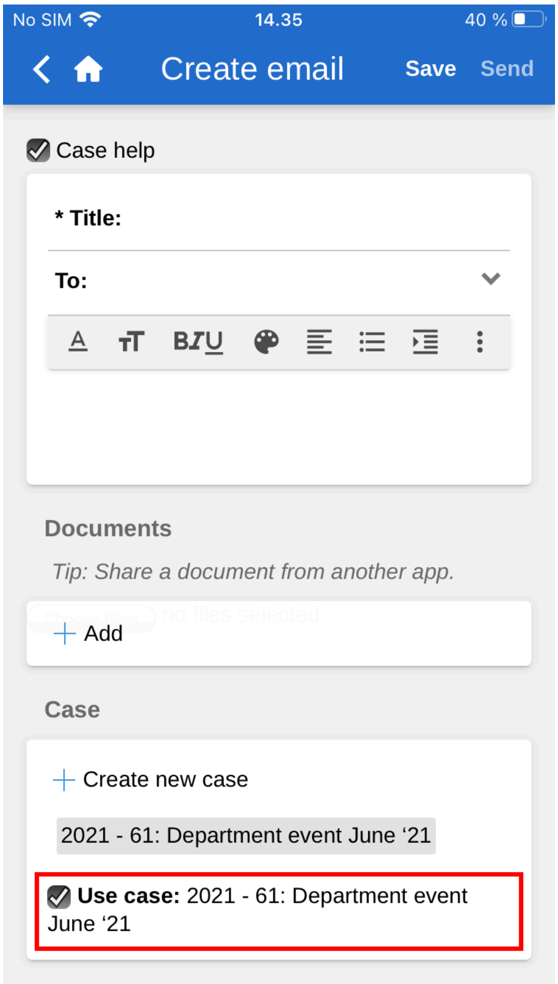


Figure 92. Attach a new record to a case

Tap **Save** to add the new record to the case.

Attach record to case

You can attach a record to an existing case or create a new case.

Tap **Edit** to enter edit mode and then **Edit record** in the grey ribbon at the bottom of the record. Then tap **Select existing case** in the "Case" section.

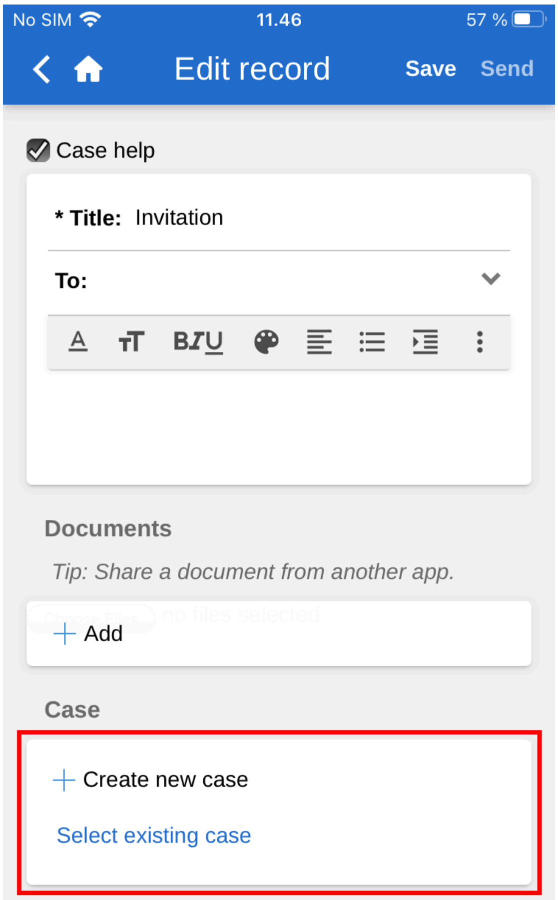


Figure 93. The “Case” field on a record

Search for the case you want to add the record to. F2 Touch automatically suggests cases matching your text. In the list of search results, tap on a case to select it.

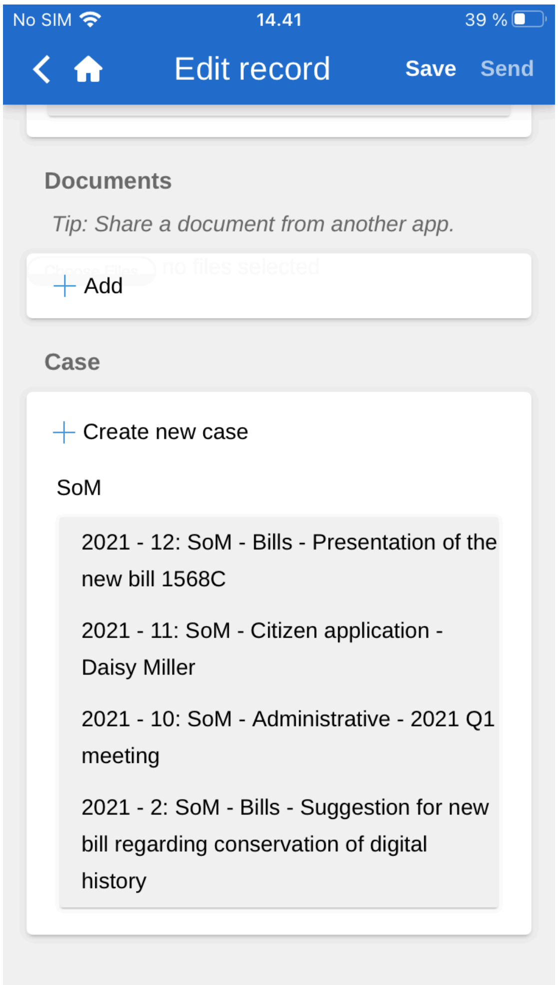


Figure 94. Case search result list

Then tap **Save** to attach the record to the selected case.

Create new case

A new case can be created using either a new or an existing record.

Tap **Create new email** to create a new record. Alternatively open an existing record and enter edit mode by tapping **Edit** and then **Edit record**.

In either case, scroll down to the “Case” field.

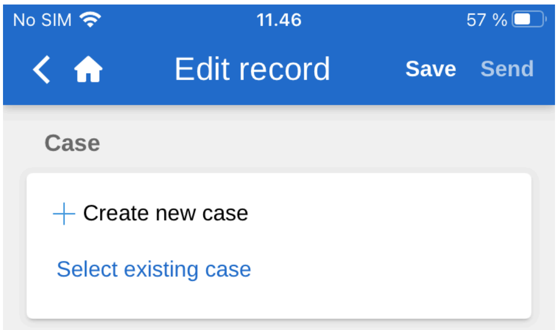


Figure 95. The “Case” field on a record

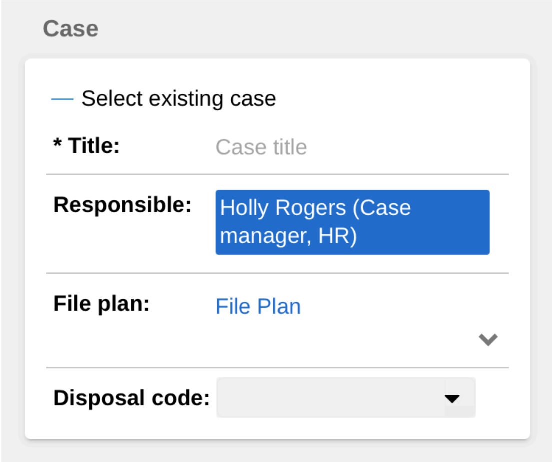


Figure 96. Create a new case

Fill in the case fields and tap **Save** to create the case.

NOTE	Some fields may be mandatory depending on F2's setup and the organisation's internal guidelines. The fields for creating a new case are identical to those in F2 Desktop.

The case metadata

A case's metadata can be accessed directly from the case. Tap the case number in the blue ribbon to view its metadata.

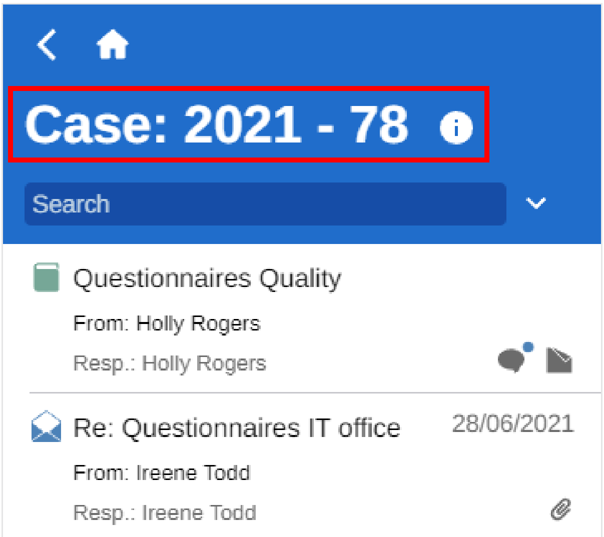


Figure 97. Go to the case's metadata

The following is displayed in the case metadata:

- Case title
- Case number
- Information about the creation of the case (case creator and creation date)
- Information about the completion of the case (case completer and completion date)
- The case's keywords, if one or more keywords are attached

- Deadline
- The user or unit responsible for the case
- The case’s status
- The case’s progress code
- The case’s file plan, action code and disposal code.

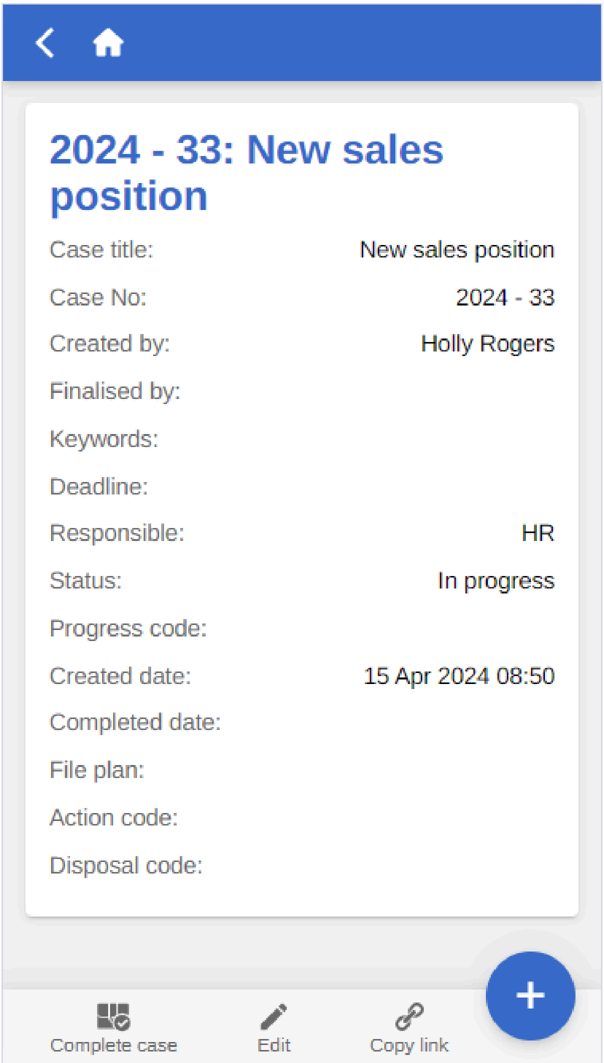


Figure 98. The case metadata

For iPads and Android tablets, the case’s metadata is displayed on the same screen as its records.

Edit the case metadata

You can edit certain case metadata directly in F2 Touch.

Go the case’s metadata and tap **Edit** in the bottom grey ribbon. Tap **Save** once you have edited the metadata.

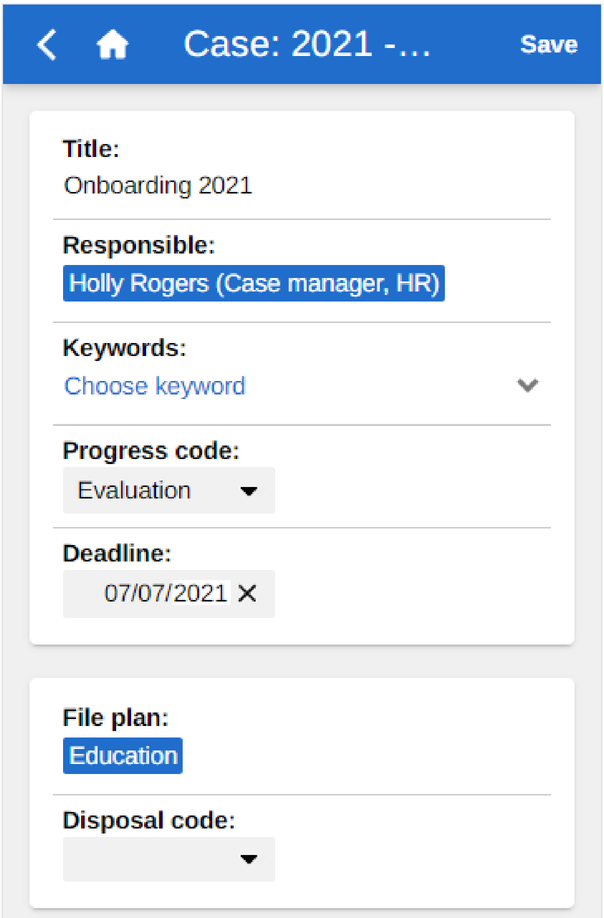


Figure 99. Edit the case metadata

NOTE You need write access to the case in order to edit the case metadata.

You can also close or reopen a case and copy a case link from the bottom grey ribbon. The link is copied to the unit's clipboard and can be inserted as a reference to the case either in F2 or in another programme.

Offline functionality in F2 Touch

In F2 Touch it is possible to open and manage records even when offline. This facilitates work in the case of Internet connectivity issues. The offline functionality is available in the F2 Touch app, but not through a web browser.

Records accessible offline

By default, F2 Touch shows the top 99 records in “My inbox” even when offline. In all other lists, F2 Touch shows the top 25 records as long as the list was previously opened while connected to the Internet.

If a record is accessed from a different list than “My inbox”, e.g. “My desktop”, it must have been opened while online in order to be accessed and managed offline in F2 Touch.

Record actions offline

In F2 Touch it is possible to perform the following record actions offline:

- Create, save, and send records.
- Edit the record’s metadata (update personal and unit control, flag, deadline, registered, and access control).
- Mark records as unread.
- Archive records.
- Delete records.
- Search for users in own authority as well as external participants on locally saved records. This makes it possible to answer emails while offline.

It is also possible to perform all actions related to chats and make use of the case help while offline.

Offline actions are queued on the synchronisation overview

Actions that are performed offline in F2 Touch are automatically placed in a queue on the device and can be viewed in the synchronisation overview. Tap the cloud icon above the list view to view the queue.

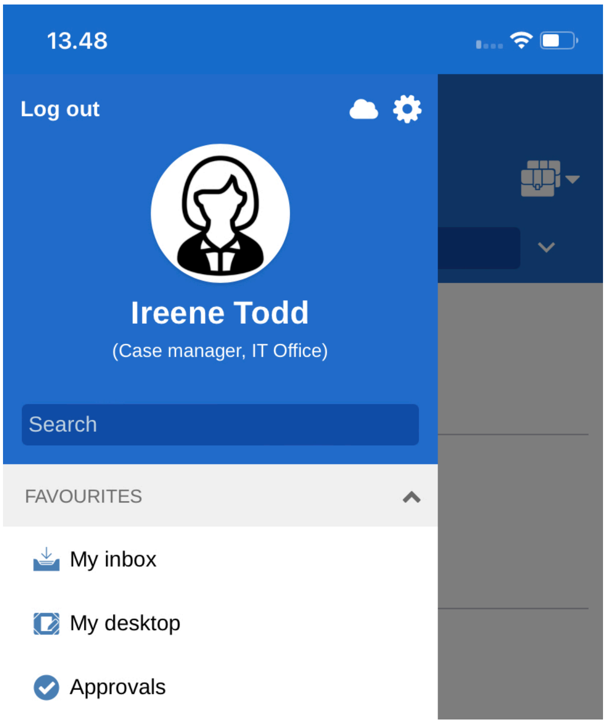


Figure 100. Go to the synchronisation overview

This is a list of actions waiting to synchronise as displayed below.

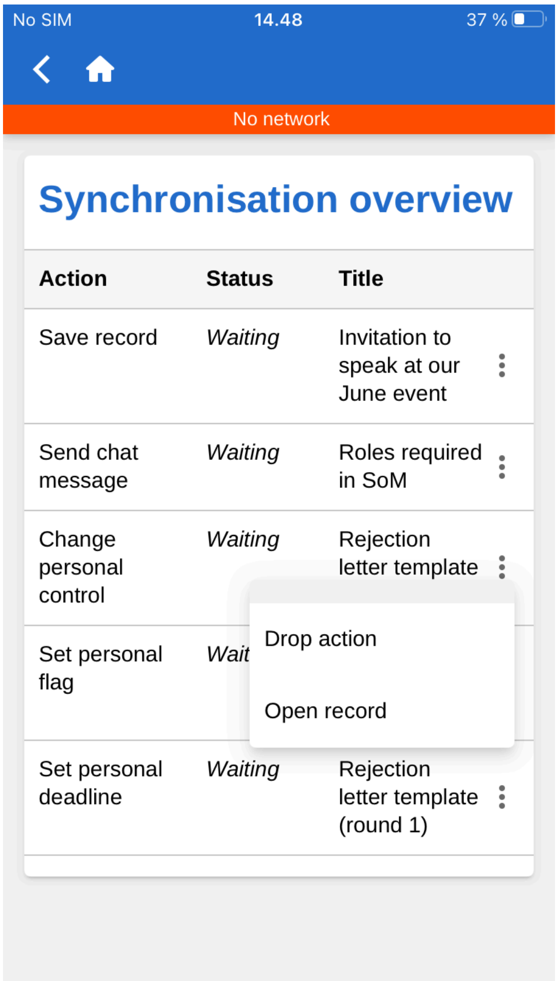


Figure 101. The synchronisation overview showing queued actions

If multiple actions have been performed on a record while offline, they will be updated in the order they were performed.

If actions have been performed on more than one record, they will be updated simultaneously when F2 Touch is back online.

Tap **menu** ⋮ next to a record to cancel the action or open the record.

Synchronisation errors

If an action related to a record fails due to e.g. a server or synchronisation error, the user must decide how F2 Touch proceeds.

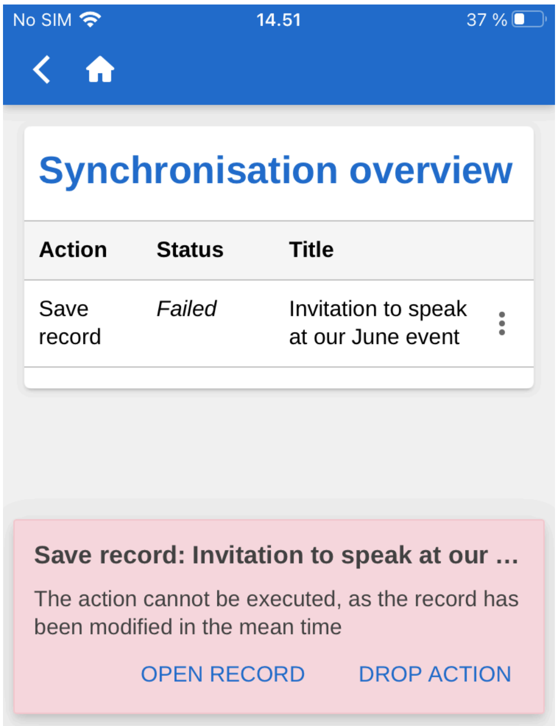


Figure 102. A failed action on a record

F2 Touch informs the user why the action failed and depending on the error will suggest possible further actions.

Failed actions are managed directly from the overview. Tap the wanted action and it will be performed instantly.

The error handling options include:

- **Cancel action** (applies to all actions).
- **Open record** (applies to all actions when the record is not open).
- **Try again** (in case access is lost or server error).
- **Perform anyway** (in case of synchronisation error in connection with personal control).
- **Show offline record** (when editing a record, F2 shows the local version saved offline).
- **Open record for editing** (when editing record fails due to server error).

- **Create draft record** (when editing record).

NOTE When multiple actions are performed on the same record and one fails, all subsequent actions on the record will also fail.

Offline actions with the “Unknown” status

If an offline action such as “Send record” or “Send chat” are not synchronised with F2, the record in question receives the “Unknown” status. Critical actions such as these are shown at the bottom of F2 Touch in the same way as failed actions. The user must decide what to do with an “Unknown” record. The following actions are possible:

- **Open record** to see if the action in question has been performed.
- **Try again** to attempt to perform the action again.
- **Cancel action** to cancel any changes.

F2 Touch Light

F2 Touch Light is a configuration that provides limited access to data in F2 Touch while connected to an unsecured network. You can only access and view records in “My archive” when using F2 Touch Light.

The purpose of F2 Touch Light is to prevent unauthorised persons from accessing the organisation’s data (i.e. the “Archive”) if a user loses their phone.

Access cases and records in "My archive"

The F2 Touch Light setup lets you access cases, but you can only see a case’s records if they are located in “My archive”.

You can access your lists as in F2 Touch, but only the records located in the your archive will be displayed.

When viewing lists based on personal searches in the “Archive”, a notification is shown at the top to remind you that only the records in the your archive are displayed.

Figure 103. Example of list that is not based on a “My archive” search

This notification does not appear on lists based on personal searches in “My archive”.

F2 Touch Light is set up in cooperation with cBrain.

It is possible to set up automatic activation of F2 Touch Light when a user switches from an organisation’s network to an external or unsecured network.

F2 Touch Light and other modules

F2 Touch Light affects use of the following add-on modules in the described way:

- **F2 cSearch**: Can only be used to search for records located in the user’s archive. It is not possible to search for cases.
- **F2 Manager**: Cannot be accessed from F2 Touch Light.
- **F2 Management Dashboards**: Cannot be accessed from F2 Touch Light.

Requests in F2 Touch

There are three types of requests:

- The internal request, which is a formal request to a user or unit to perform a task within the organisation.
- A group request, which is a request to a user or unit to perform a task, sent from one authority to another within the same F2 installation.
- An external request (documentation available in Danish), which is a request to perform a task from one F2 installation to a user or unit in another F2 installation.

The following sections describe the internal request. Your options for processing group requests and external requests in F2 Touch are limited.

Create internal request

A request is created from a record. Tap the **add icon** + and then **New request**.

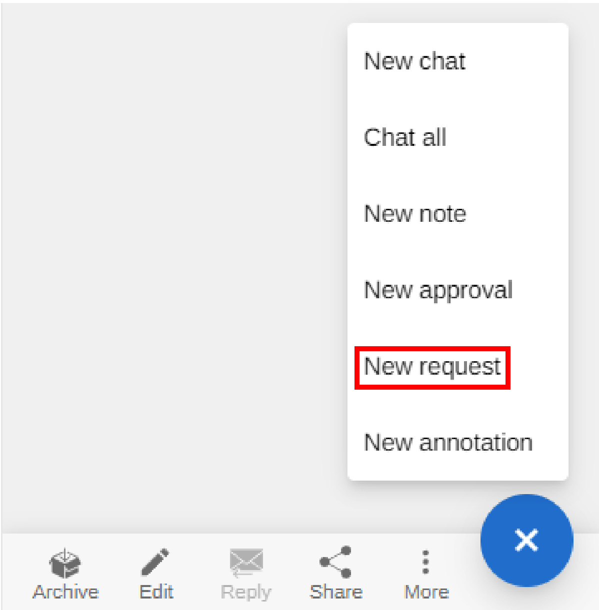


Figure 104. Create new request

When creating a request, enter the request metadata and the request recipient. This procedure is the same as when creating requests in F2 Desktop.

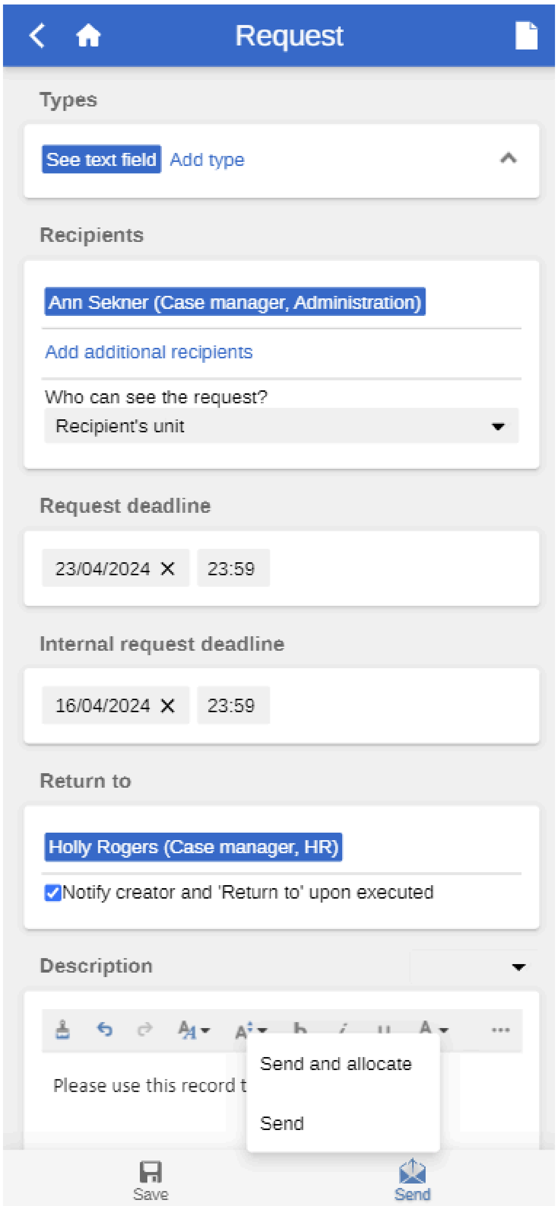


Figure 105. Newly created request

Open request

The record with the request is placed in the request recipient’s inbox. The recipient can open the request from this record. Correspondingly, you can access the request from the answer record. The answer record is created when a request recipient formally initiates the execution of the request.

NOTE In F2 Touch, the answer record is always attached in a format predetermined in F2 Desktop. This means that the format cannot be changed in F2 Touch.

Open the record with the request and tap the request icon . Tap the request you want to open.

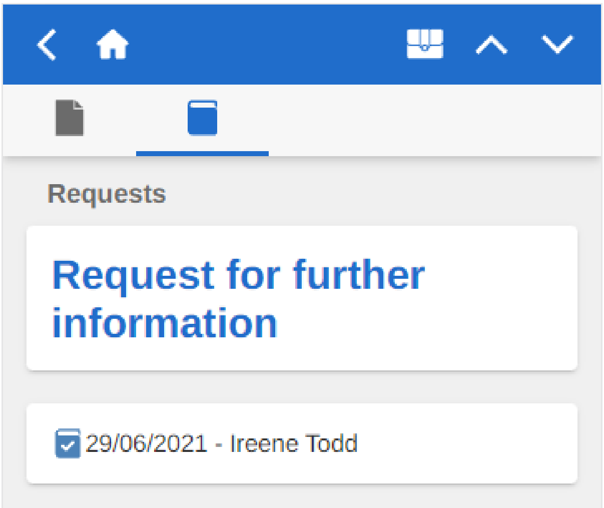


Figure 106. Request overview

You can reply to a request in F2 Touch in the same manner as in F2 Desktop.

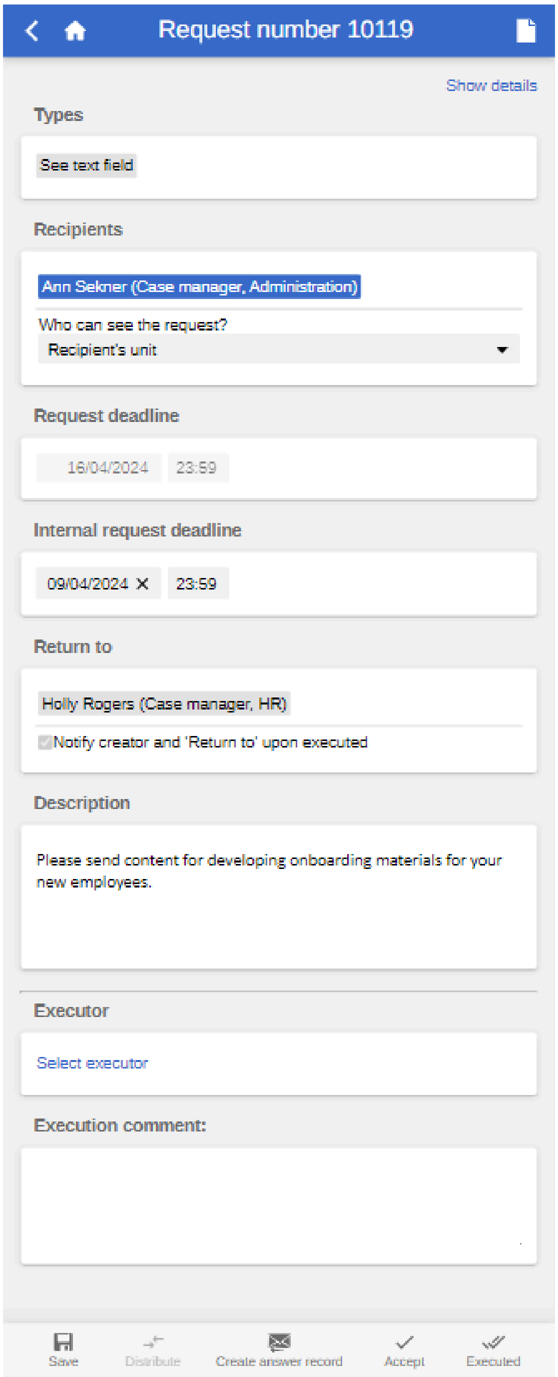


Figure 107. A request

Show request history

Tap **Show details** to gain an overview of the request's history. This displays information about all activities related to the request, e.g. request creator, the user who accepted it, creation time for an answer record, etc.

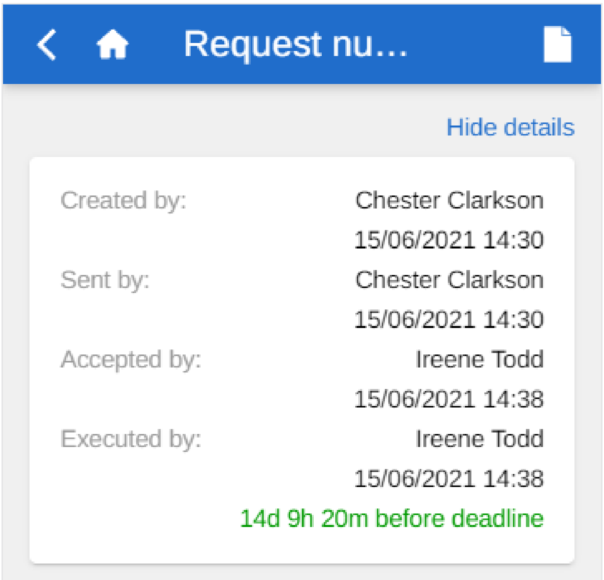


Figure 108. Request history

Group requests and external requests received in F2 Touch

Group requests appear in both your personal inbox and your unit's inbox. In F2 Touch it is possible to open the request on the record and view all related details, but it cannot be edited.

External requests appear in your unit's inbox only. Contrary to group requests, it is not possible to open or view details for external requests when using F2 Touch. However, the external request is still visible on the record under "Requests".

cSearch in F2 Touch

F2 cSearch enables a quick free-text search across all data in F2 to which you have access.

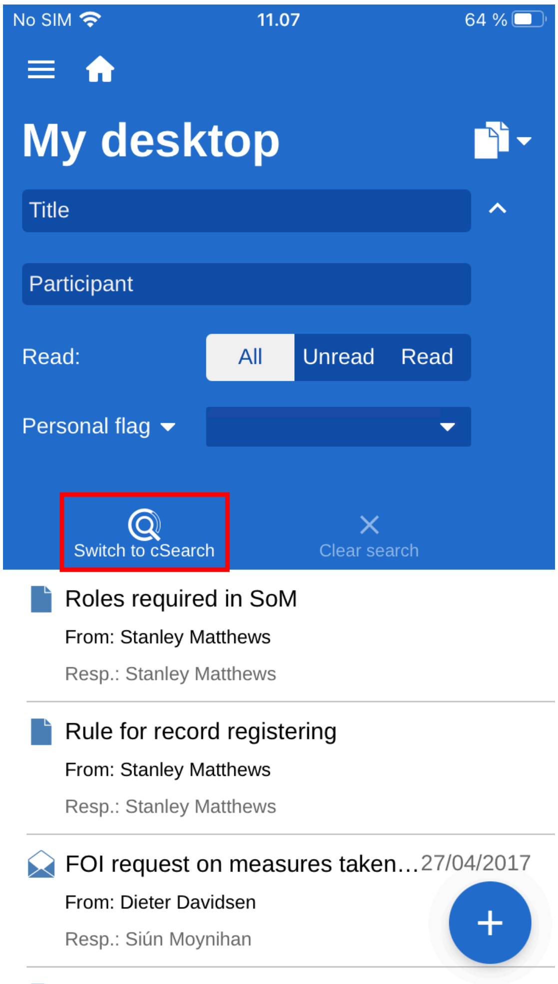


Figure 109. Open cSearch

cSearch can be found by expanding the search options in any list. Tap next to the search field above the result list and then **Switch to cSearch** to open cSearch.

Read more about cSearch.

Quick search

Search quickly by entering the search word in the search field. The search will then start automatically.

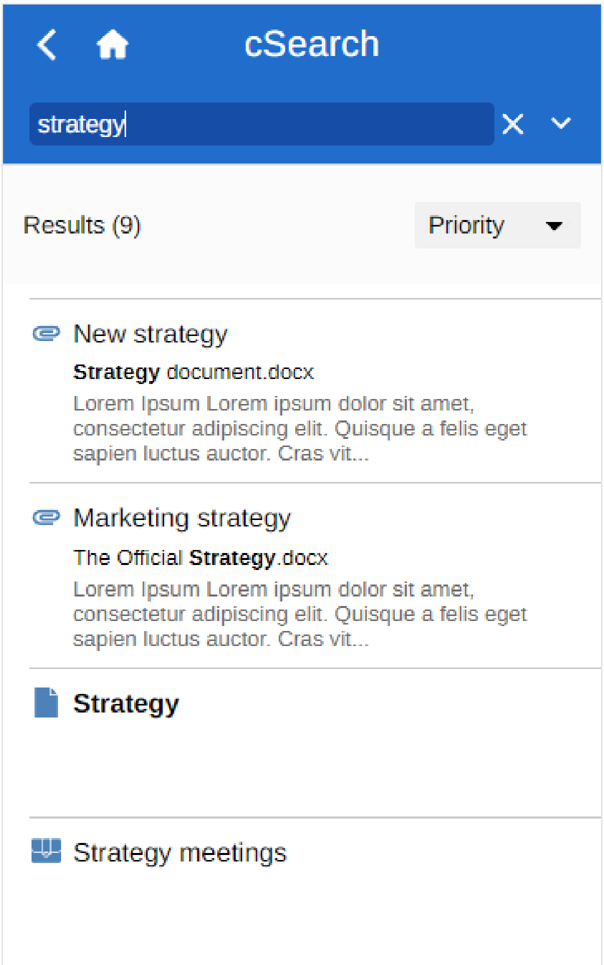


Figure 110. A quick search using cSearch

The search finds all contexts in which the search word/search text is included, both as a complete word and as part of a word.

To treat the search text as a completed word, enter a space in the search field after the last letter.

Tapping a result will display the corresponding record.

Advanced search

cSearch in F2 Touch contains the same advanced search features as in F2 Desktop. Tap the **drop-down arrow** to the right of the search field to open the advanced search features.

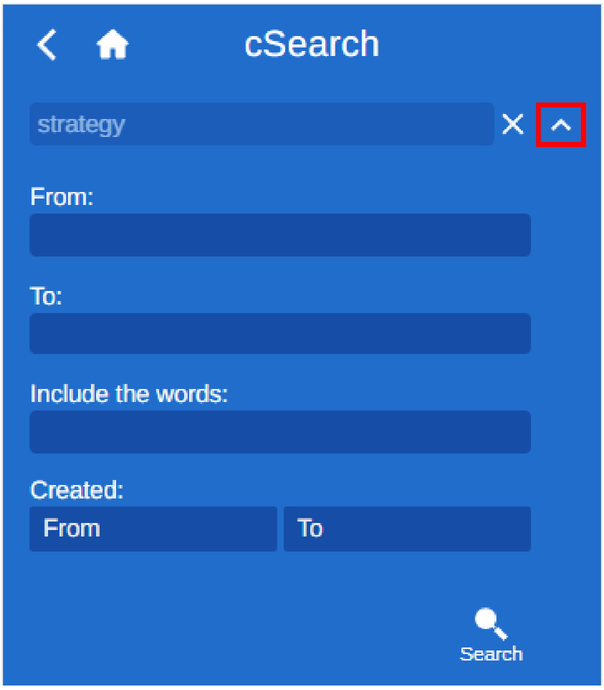


Figure 111. Advanced search

The advanced features allow e.g. searches for values in metadata fields such as “From”, “To”, “Created” or for the specific content of a record, case, chat, note, etc.

Approvals in F2 Touch

Approvals meet the need to execute formal approvals of produced materials. Approvals can be accessed from the list view. Tap the **list view icon** and select **Approvals**.

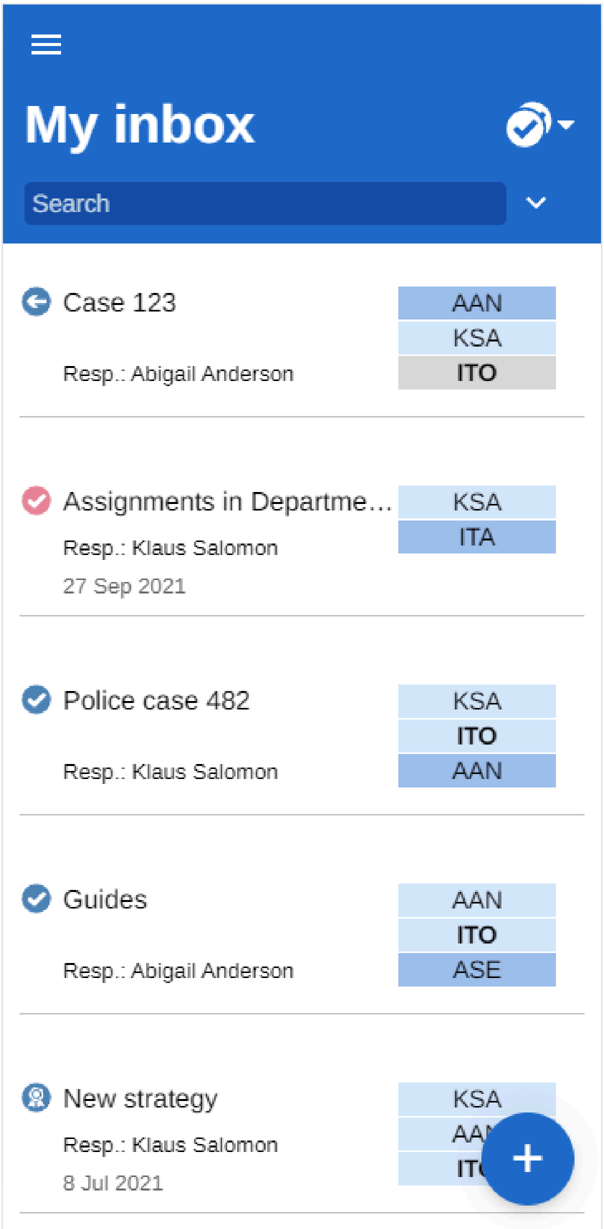


Figure 112. List of records with approvals

You will then see all records in an active approval flow to which you have access.

You can switch to the approval view on an open record by tapping the **approval icon** in the record's upper grey ribbon.

Manage approval

An approval can be processed when it is on the step of the following:

- A user or unit who is an approver.
- An approver with "On behalf of" rights.

- A copy recipient.

As an approver, you can approve or return the approval with or without a comment. You have the same options if your unit is added as an approver.

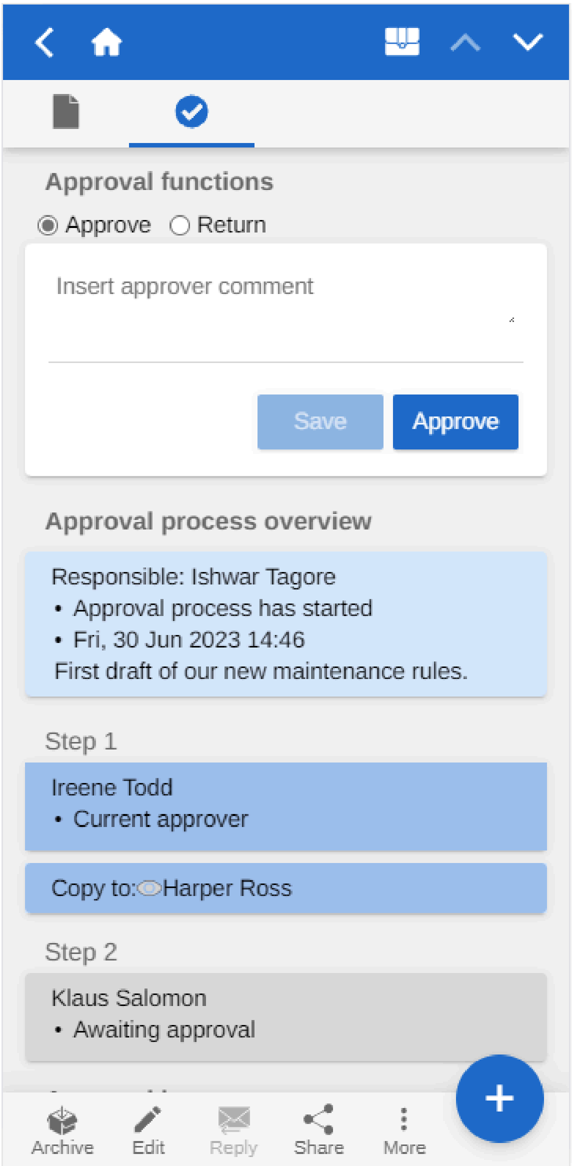


Figure 113. Process the approval as an approver

As a copy recipient, you can mark the approval as “seen”, and you have the options of notifying the responsible user and adding a comment.

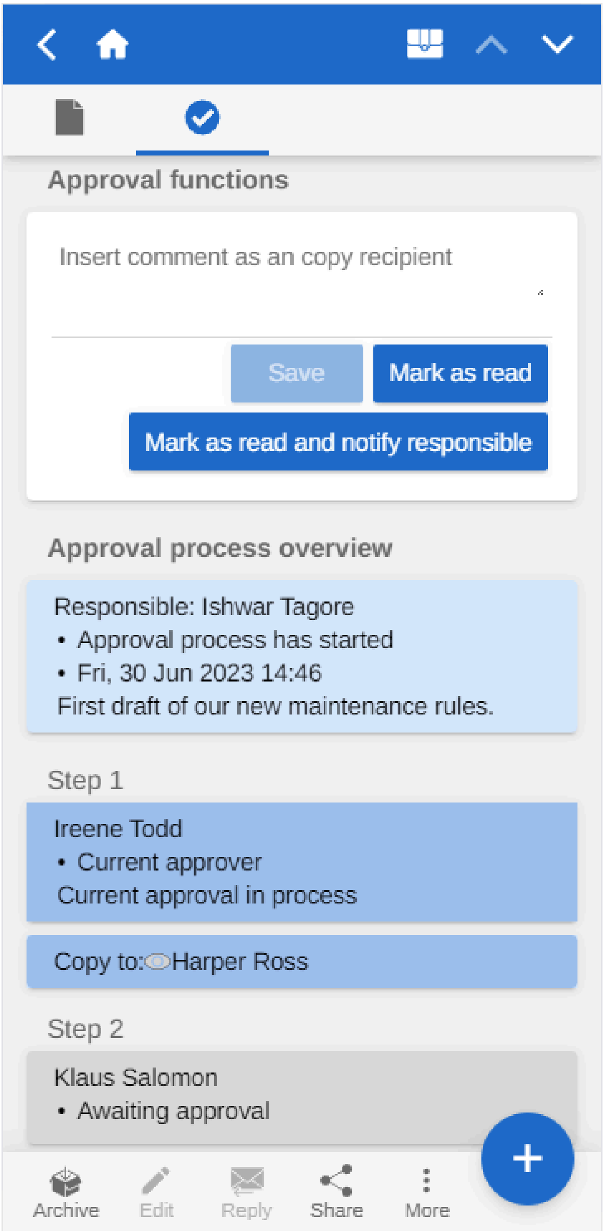
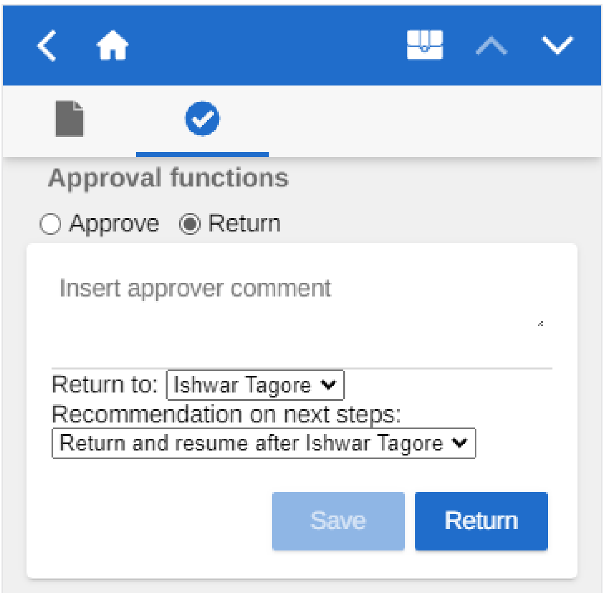


Figure 114. Process the approval as a copy recipient

When returning an approval in F2 Touch, you have the same options as in F2 Desktop.



Here you can select to which user you want to return the approval. It is also possible to recommend with which user the approval should resume.

Approval status

The approval's status and process overview are shown below the approval record. The approval status shows which step the approval is currently on or if it is finally approved. Its deadline and type, if any, are also shown here.

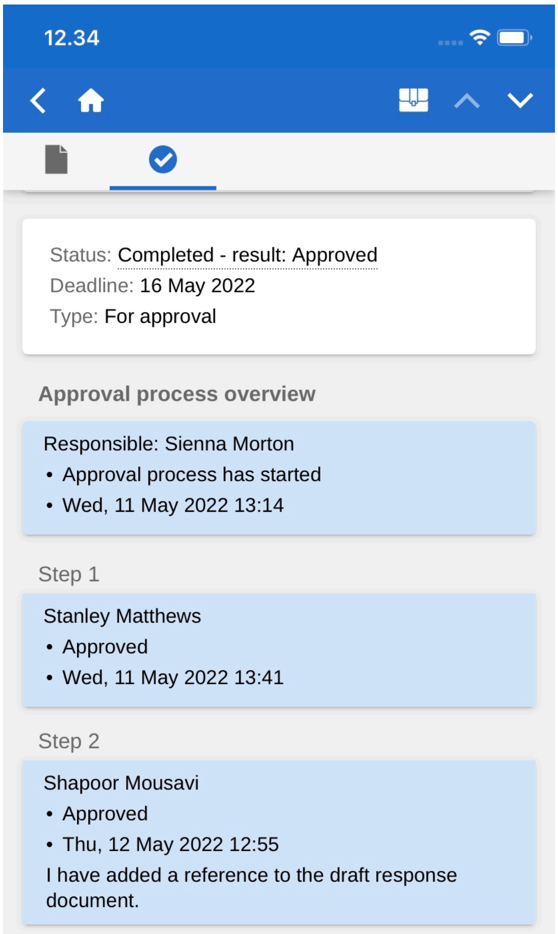


Figure 116. Status and approval process overview

The "Approval process overview" section shows information about each approval step.

The "Approval log" section is found below the "Approval process overview section". The log shows all actions performed in relation to the approval process and any comments related to the actions.

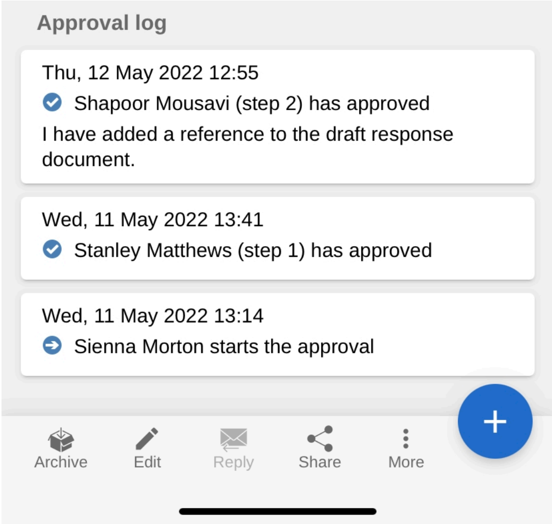


Figure 117. The approval log

The log is presented in reverse chronological order, so the latest approval action is shown at the top.

Create and edit approvals

It is possible to create, start, and edit approvals in F2 Touch. The options for creating and editing approvals are dependent on configurations, which are performed in cooperation with cBrain.

The following is possible by default:

- Approvals can be created on existing records using a template.
- Approvers and copy recipients can be edited on every step.
- Approval steps can be deleted.

The individual functions are described in the following section.

Create new approval

It is possible to create a new approval using existing templates in F2 Touch.

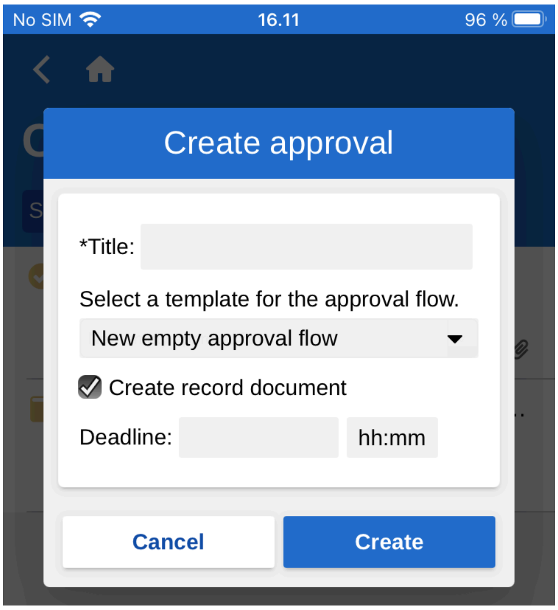


Figure 118. Create a new approval using a template

The templates are created and maintained in F2 Desktop.

An approval can be started in F2 Touch.

Options available to a user when creating approvals with or without an approval document can be configured. Any configurations are performed in cooperation with cBrain.

Edit approval

You can edit approvals in F2 Touch. The following actions are available:

- Add step (1).
- Edit the approval deadline (2).
- Select type from the drop-down menu (3).
- Delete step (4).
- Add or remove approver or copy recipient (5).
- Edit other metadata fields, e.g. “Limited visibility”, “Notify approver”, etc (6).

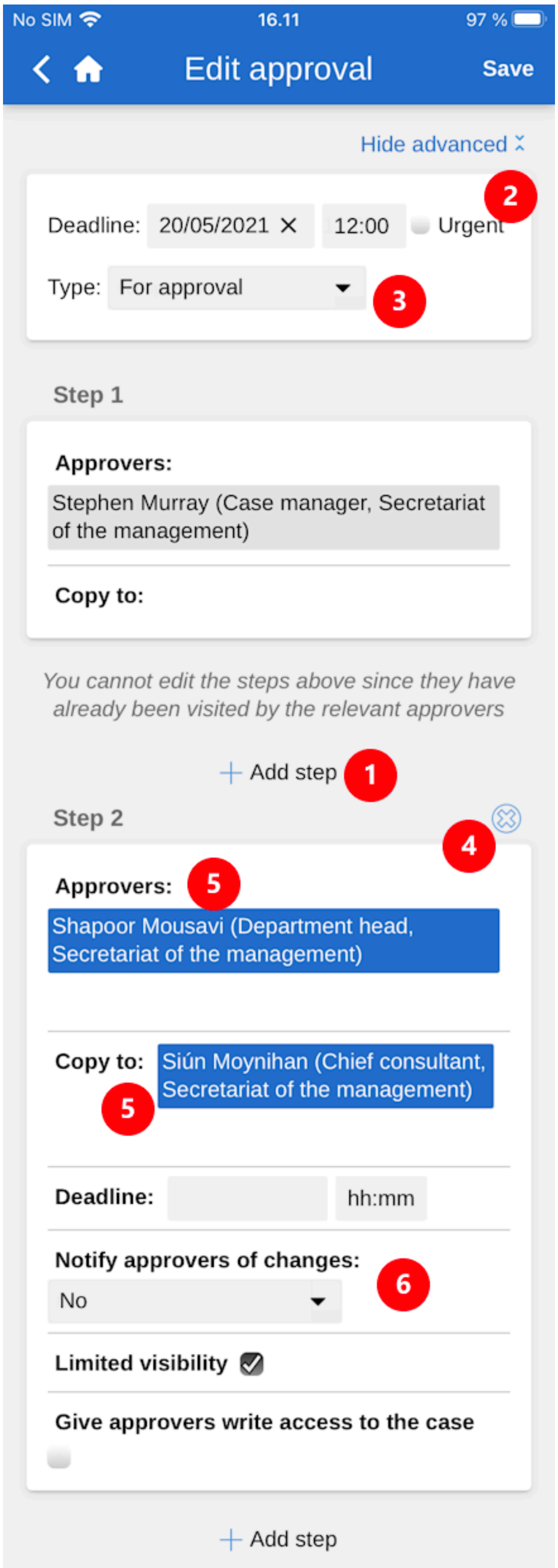


Figure 119. Edit approval

The following actions are not possible in F2 Touch:

- Edit deadlines for individual steps.

Tap **Show advanced/Hide advanced** to toggle the visibility of the editing options.

It is only possible to edit steps that the approval has not yet reached.

Offline approval actions

It is possible to perform a number of actions in F2 Approvals when F2 Touch is offline:

- Process/save/approve approvals.
- Mark an approval as “Seen” as a copy recipient.
- Edit an approval document.

Gateway approvals in F2 Touch

Using the approval gateway in F2 Touch, a secretariat can manage and quality assure approval processes for one or more managers.

You can find the search lists for the approval gateway below the standard search list node in F2 Touch.

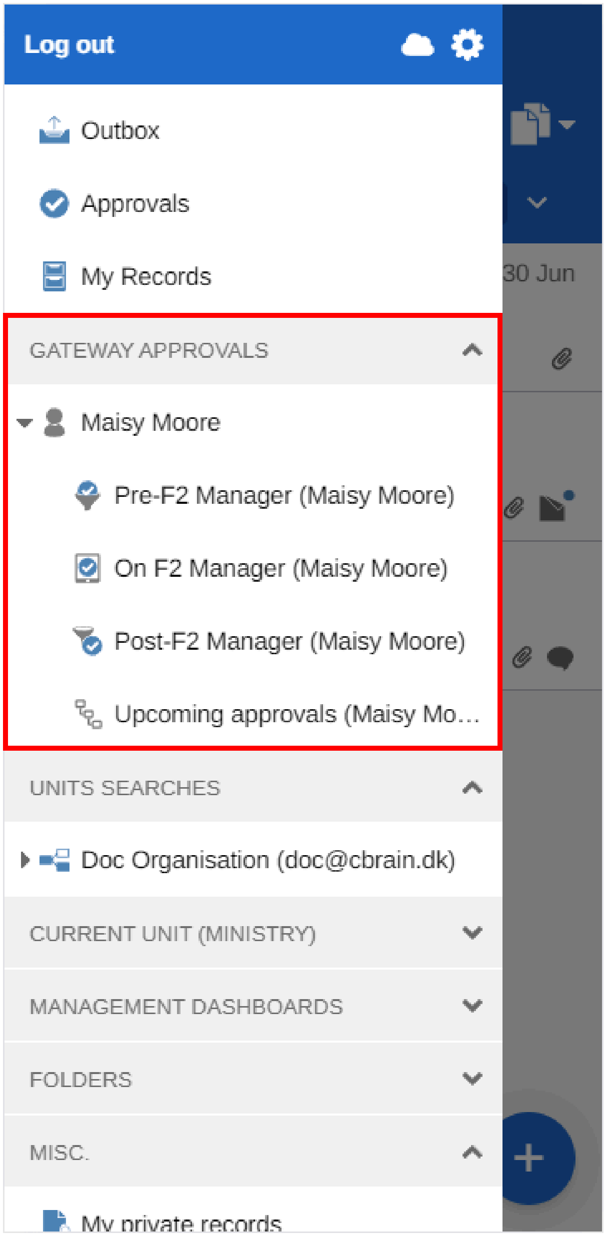


Figure 120. Gateway approval lists

The following sections describe how you manage approvals and view synchronisation reports on F2 Touch.

Manage approval

All functions for managing an approval are found on the "Gatekeeper function" tab on the individual approval.

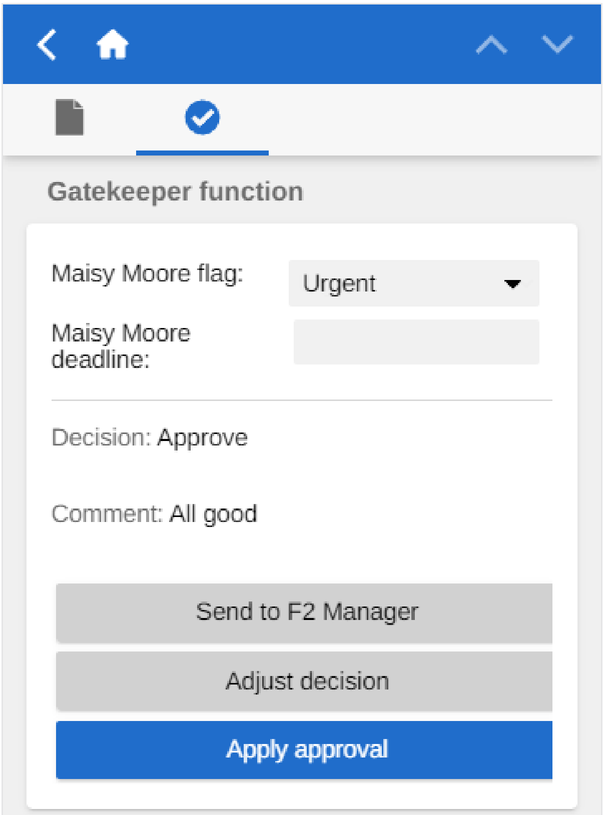


Figure 121. Functions for managing gateway approvals

Synchronisation reports

If synchronisation issues occur between F2 Desktop and F2 Manager, F2 generates a synchronisation report. The report contains details about the synchronisation incident. Manual handling is required to resolve the incident.

To open and handle a synchronisation report, go to the "Synchronisation reports" section on an approval.

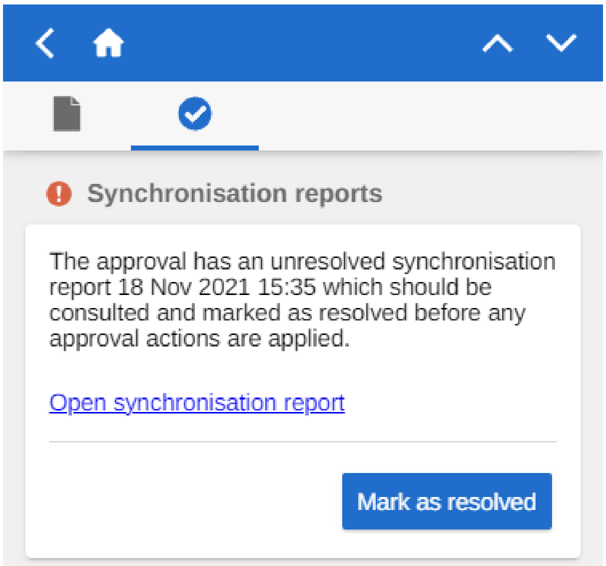


Figure 122. Unhandled synchronisation report

When the report is marked as resolved, it disappears from the record. You can retrieve synchronisation reports that have been resolved on F2 Touch on the "Gateway approvals" tab in F2

Desktop.

F2 Manager in F2 Touch

F2 Manager is developed for iPads. F2 Manager provides both online and offline access to cases, meetings, and approvals for the organisation's employees and executives.

Transfer cases and records

You can transfer cases and records from F2 Touch to F2 Manager. Open a case and tap the **case title** in the blue ribbon to view the case details.

From the case details, tap the **add icon** ⊕ and then **New F2 Manager**.

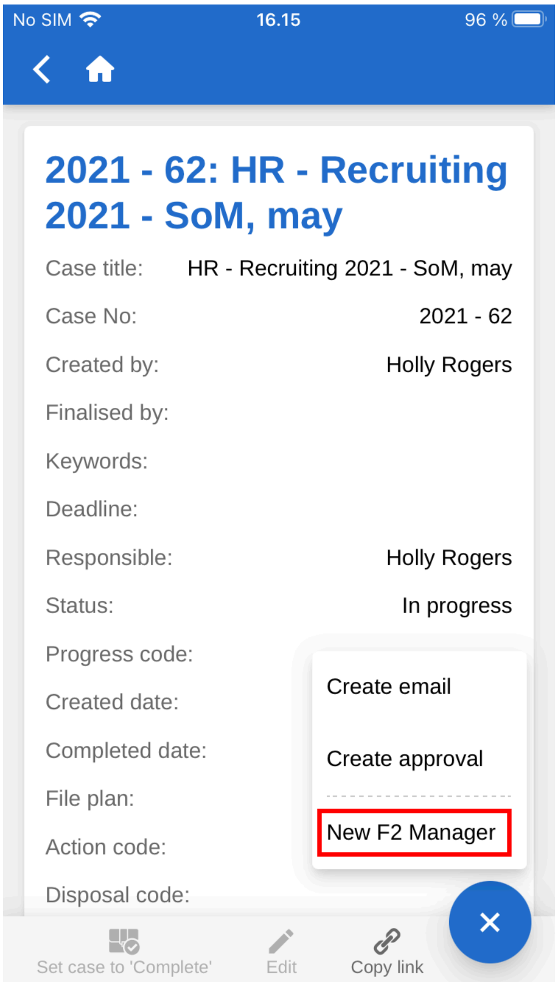


Figure 123. Transfer to F2 Manager

Tapping **New F2 Manager** opens a synchronisation screen where you can add relevant information associated with the transfer to F2 Manager. The procedure is the same as when creating an ad hoc meeting in F2 Desktop.

Tap **Save** in the upper right corner of the screen when you have added the needed information. Rea more about synchronisation with F2 Manager.

After selecting **New F2 Manager** and saving your information, F2 Touch adds the **F2 Manager** menu item in the case's grey ribbon. This corresponds to the F2 Manager case tab in F2 Desktop.

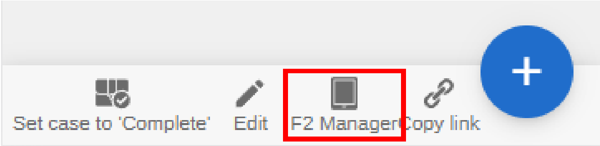


Figure 124. The "F2 Manager" menu item

Synchronisation with F2 Manager

The synchronisation screen consists of sections in which the relevant meeting information can be added when a meeting is created from F2 Touch. Each section is described in the following.

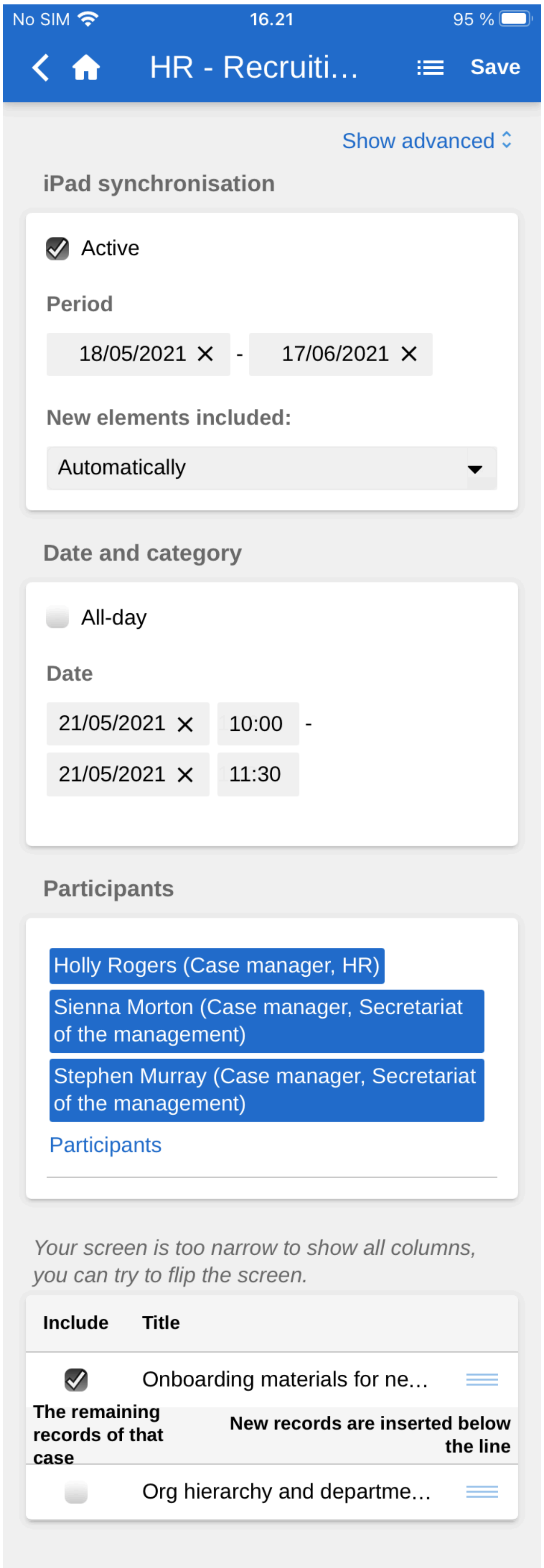


Figure 125. Synchronise with F2 Manager

iPad synchronisation

Tick the “Active” box to synchronise the records on the synchronisation list to F2 Manager.

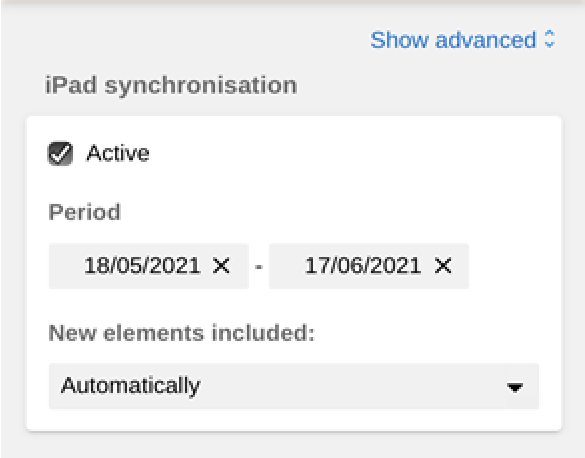


Figure 126. iPad synchronisation

Records are synchronised only in the specified period and to the specified participants. Outside the specified period, the records do not appear on the iPad.

Use the “New elements included” drop-down to choose whether to include new elements automatically or manually.

Date and category

Use the fields in the “Date and category” section to specify a meeting date and time. Tick off the “All-day” box if the meeting lasts longer than a day.

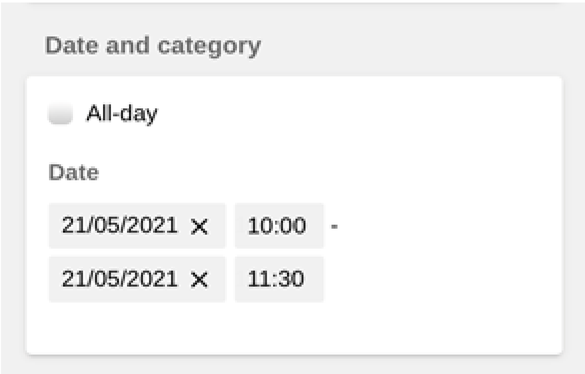


Figure 127. Date and category

Entering a date is required, while entering a time is optional.

Participants

Use the “Participants” field in the “Participants” section to add meeting participants. These receive:

- The option of evaluating each agenda item up for evaluation.
- Read access to records that serve as the basis of the agenda items.

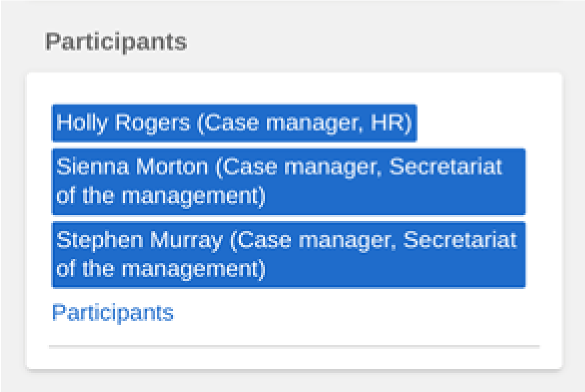


Figure 128. Participants

The synchronisation list

The synchronisation list shows which records are transferred to the iPad when synchronising. Untick a record on the list to exclude it from synchronisation. Unsynchronised records are shown in the list “The remaining records of that case”.

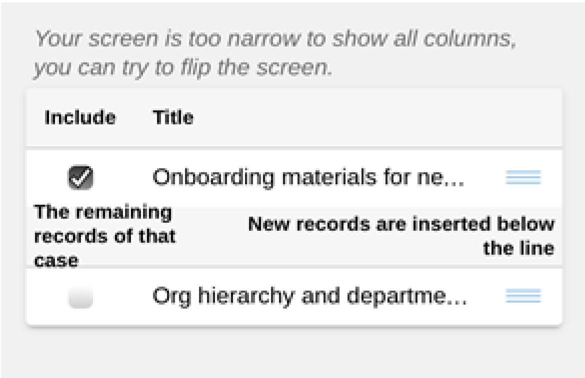
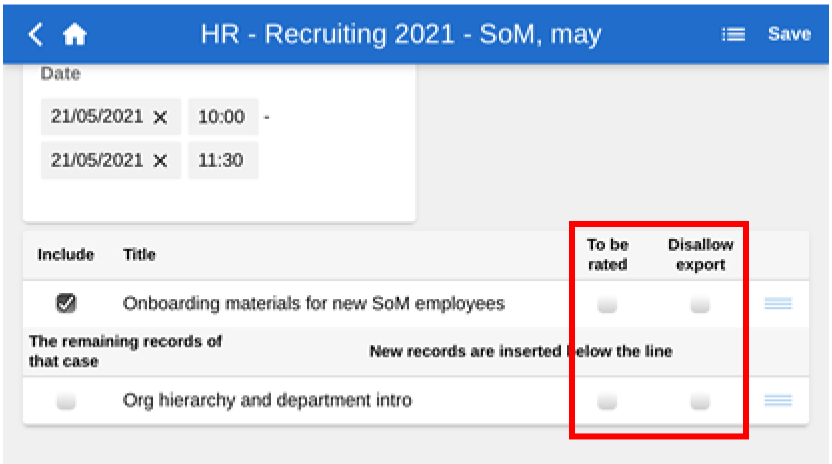


Figure 129. The synchronisation list

It is possible to change the order of the records or move records from one list to another. Press and hold the **drag and drop icon** and drag the record to the desired location.

The "To be rated" and "Disallow export" columns

The synchronisation list also contains the “To be rated” and “Disallow export” columns. To view them, rotate your device 90 degrees.



Tick the box in the "To be rated" column to let the meeting participants evaluate the agenda item. Advanced options related to evaluation also exist. These are described in the Show advanced section.

Tick the box in the "Disallow export" column to prevent the agenda item from being exported from the F2 Manager app. This means that the agenda item and its attachments cannot be shared with other apps on the iPad and cannot be printed.

Show advanced

Tap **Show advanced** in the upper right corner of the synchronisation screen to open the advanced F2 Manager synchronisation options.

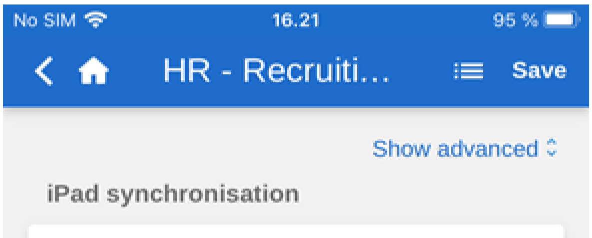


Figure 131. The "Show advanced" item

The advanced synchronisation options include:

- Add a category to the meeting. Use a category to indicate the general topic of the meeting.
- Add stakeholders to the meeting. Stakeholders cannot evaluate agenda items, but otherwise have the same rights as meeting participants.
- Add additional information, such as meeting title and description.
- "Can only be submitted until": Specifies in hours the end time of the period in which meeting participants can submit their evaluation.
- "Not shared until": Specifies in hours the start time of the period in which meeting participants can view everyone's evaluations.

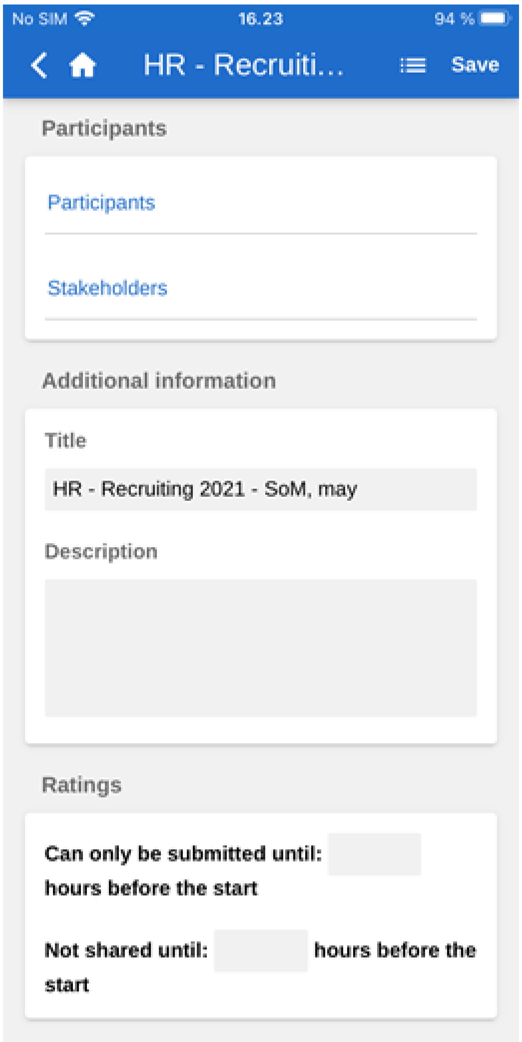


Figure 132. Advanced synchronisation options

Annotations made in F2 Manager

In F2 Manager, you can annotate documents attached to a meeting. This is a quick and easy way to add comments and highlight important sections in the document for later use.

When you open F2 Touch after making annotations in F2 Manager, F2 Touch automatically displays the case with which the annotation record/document is associated. Annotation records can be found by searching the "Archive": Specify the user who made the annotation in the "Record/case responsible" field, and then enter "F2 Manager archive" in the free-text search field to perform the search.

The search shows all records annotated by that user and may be saved to allow quick access to future annotations.

The annotations will not be visible if F2 Touch uses Apple's PDF viewer, which does not support these annotations. To accommodate this, you can export the document to another app that can read annotations (such as Acrobat Reader).

F2 Touch configuration options

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

- Log in to F2 Touch using Touch ID on iOS devices with this functionality available.
- Log in to F2 Touch using Face ID on iOS devices with this functionality available.
- Log in to F2 Touch using “Remember me”.
- Allow users to select whether the dates and times displayed in F2 Touch depend on the time zone of the server or the device.
- Determine user options for creating, starting, and editing approvals, as well as the option of creating approvals without a record document.
- When an answer record to a request is created in F2 Touch, the request record is automatically linked to the answer record depending on the organisation’s setup. The format is configured in F2 Desktop.
- Choose whether F2 Touch Intune should only allow login using MSAL (Microsoft Authentication Library).
- Change the number of characters that need to be entered before F2 (automatically) begins searching.

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