Records

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Records

> Use our Quick Guide on documents, records, and cases to keep track of how they are related.

All work in F2 starts with a record. For instance, records hold all attached documents and serve as basis for approval flows and requests. You can also add chats and notes to the record, and you can send it as an email or Digital Post. Restrict or expand access to the record to control who can open and edit it as described in access control.

Here you can read about records in F2 and how you work with them via the record window functions. You can read about record access, record metadata, and advanced functionality among other topics.

The record window structure

The record window can be accessed in two ways:

- By creating a new record
- By opening an existing record.

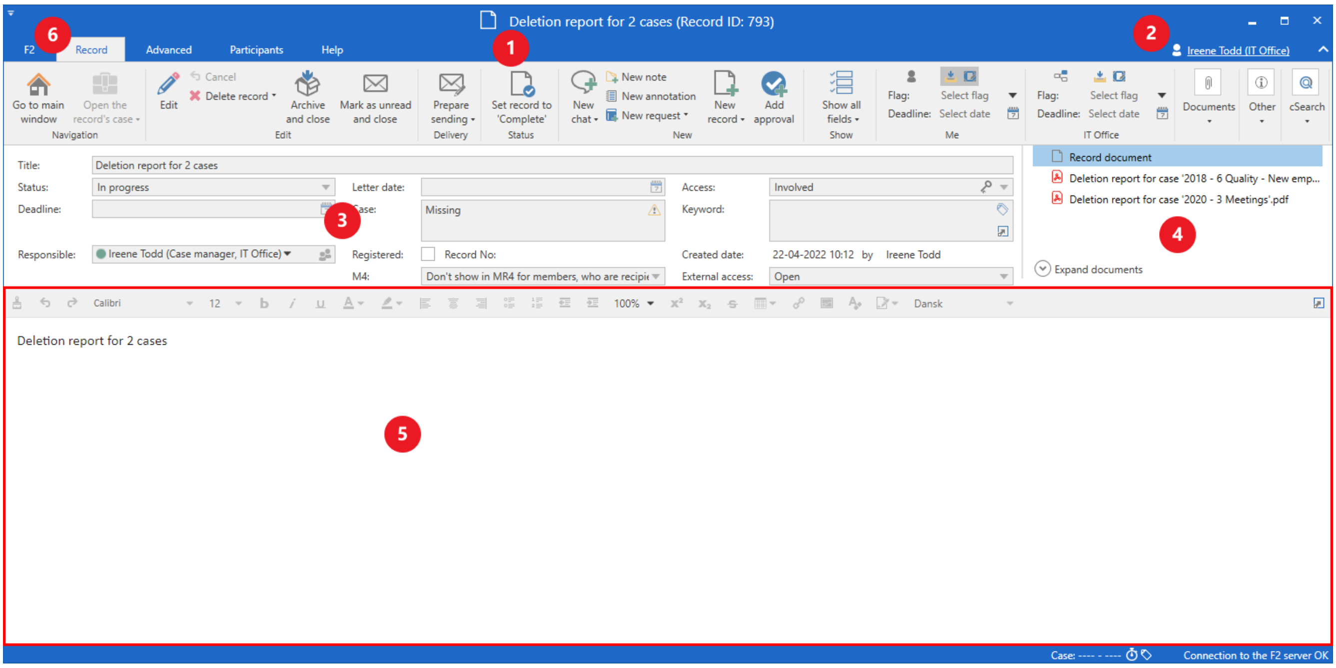


Figure 1. Record window structure

The record window consists of six elements:

1. The record's title and ID number.
2. The user identification which shows your name and current unit.
3. The metadata fields of the record, e.g. the user responsible for the record, the deadline, any keywords, etc.
4. The document area, which shows any attached documents.

5. The record editor pane (i.e. the record document), in which you enter and edit the text.

6. Record tabs. See below.

   - "Record" is the default tab of the record window. This tab contains menu items for communication, processing, and managing the record. In the main window, you can find similar functionality in the "Main window" tab.
   - "Advanced" contains functions pertaining to delivery types, clean-up, version management, and record history.
   - "Participants" provides you with an overview of the involved participants.
   - "Help" lets you access the help functions of F2, such as short articles about using F2 and links to F2 Docs.
   - "F2" lets you access various support functions such as document recovery.

TIP	The content of the record window changes depending on whether the record document or an attached document has been selected. Clicking on an attached document will display a preview of this document instead of the record document. For further information on the record document editor, see The record editor pane.

Creating a new record

Create a new record by clicking **New record** in the ribbon of either the main, record or case window.

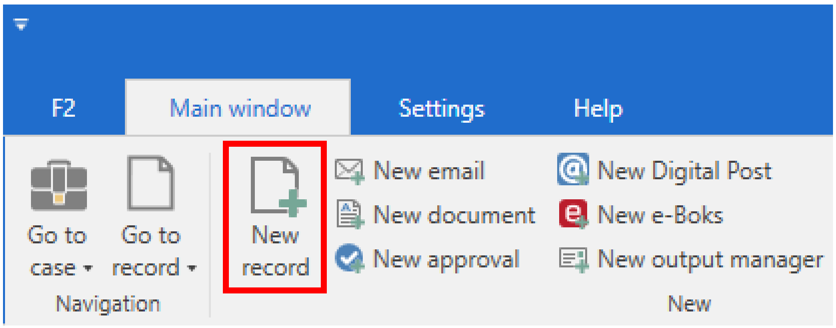


Figure 2. The "New record" menu item

This opens the following dialogue in which you must enter the basic information required to create the new record.

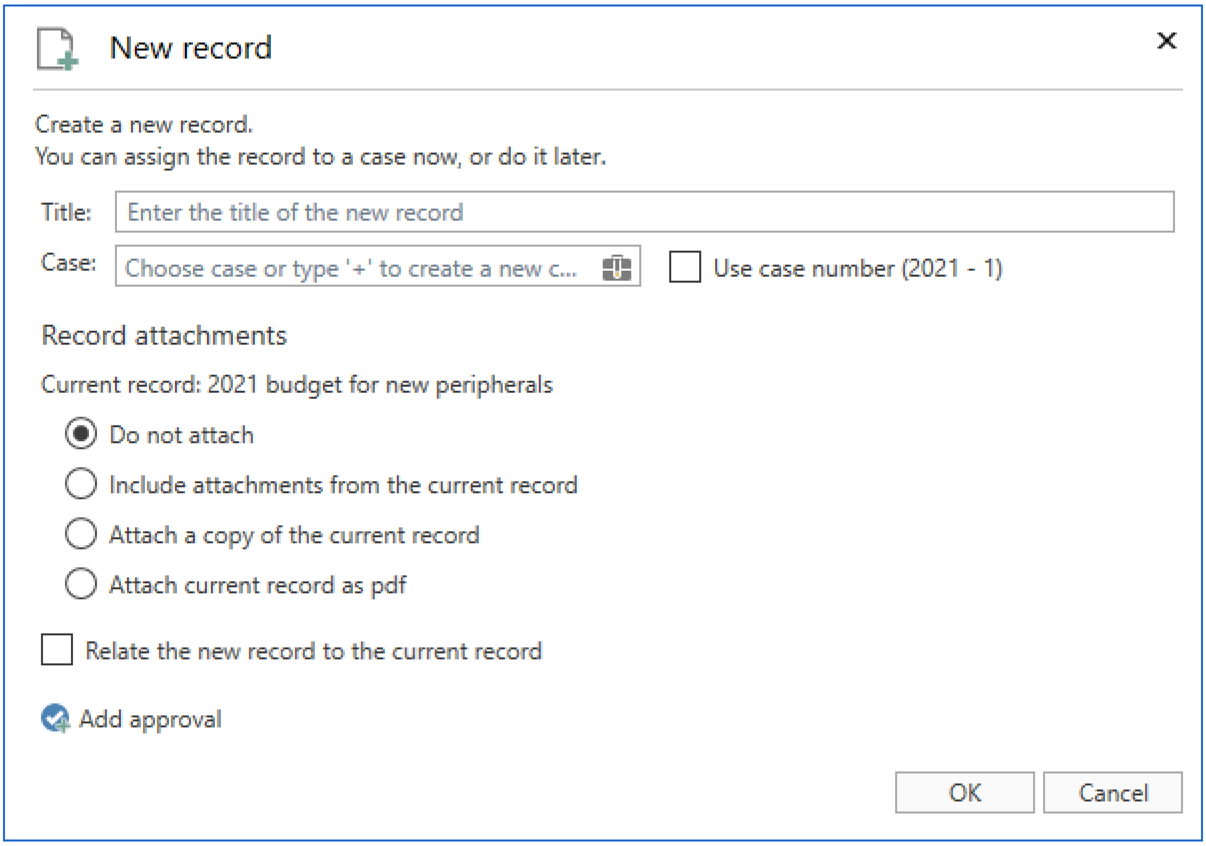


Figure 3. Creating a new record

Fill out the following fields:

Field	Description
“Title”	Enter the title of the record here.
“Case”	Add an existing case to the record by entering the case number or case title in this field. It is possible to search for a case by clicking the case icon . A new case can also be created for the record. For further information on attaching records to cases, see Adding a record to a case. Read more about cases and their creation. **NOTE** Suggestions in the “Case” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
“Use case number”	If this box is ticked, the new record is added to the case that was selected or open (possibly via another record) when the new record was created. **NOTE** Manually delete the case number proposed by F2 to untick this box.
“Record attachments”	The following options are only active if the user has selected or opened a record before clicking on **New record**: • **Do not attach**: No records or record attachments are carried over to the new record. • **Include attachments from the current record:** Attachments from the selected or open record are copied to the new record when it is created. • **Attach a copy of the current record:** Attaches the record selected before the creation of the new record. This option attaches the documents and metadata of the record as a PDF file. • **Attach current record as PDF:** Compiles all documents of the record selected before the creation of the new record and attaches them as a PDF file.
“Relate the new record to the current record”	Tick this box to set the new record as answer record to the one selected or opened before clicking **New record** in the main, record or case window.
“Add approval”	Add an approval process to the record. Requires the F2 Approvals add-on module.

Click **OK** to open the record window.

NOTE To ensure that there are no records without titles in F2, a record cannot be saved or sent unless it has a title.

When a record cannot be saved, a warning icon appears in the upper right corner of the record window, next to the user identification. Hover the cursor over the icon for additional information.

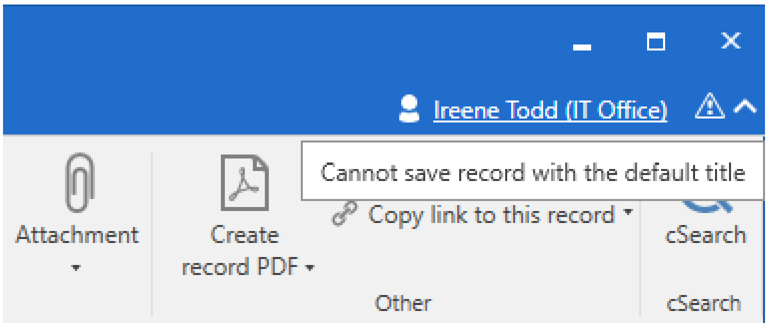


Figure 4. Warning on a new, untitled record

Set up record view

You can set up how the metadata fields of records are displayed. From the “Settings” tab in the main window, click on **Setup** on the ribbon and navigate to **Record view**. Here you can choose which fields are displayed by default. Read more in Settings and setup.

Adding a record to a case

You can add records to existing cases and create new cases based on records. The following sections describe how a record is added to a case.

Adding a record to an existing case

A record in edit mode can be added to an open case by entering the case title or case number in the “Case” metadata field. When the user starts typing in the field, F2 starts searching for relevant cases.

It is possible to search for a case by clicking the **case icon** in the “Case” metadata field. This opens the “Choose cases” dialogue from which the relevant case can be found. For further information on this dialogue, see the section The “Choose cases” dialogue.

When a case has been added to the “Case” metadata field, click **Save** in the record window ribbon. The record is then added to the case.

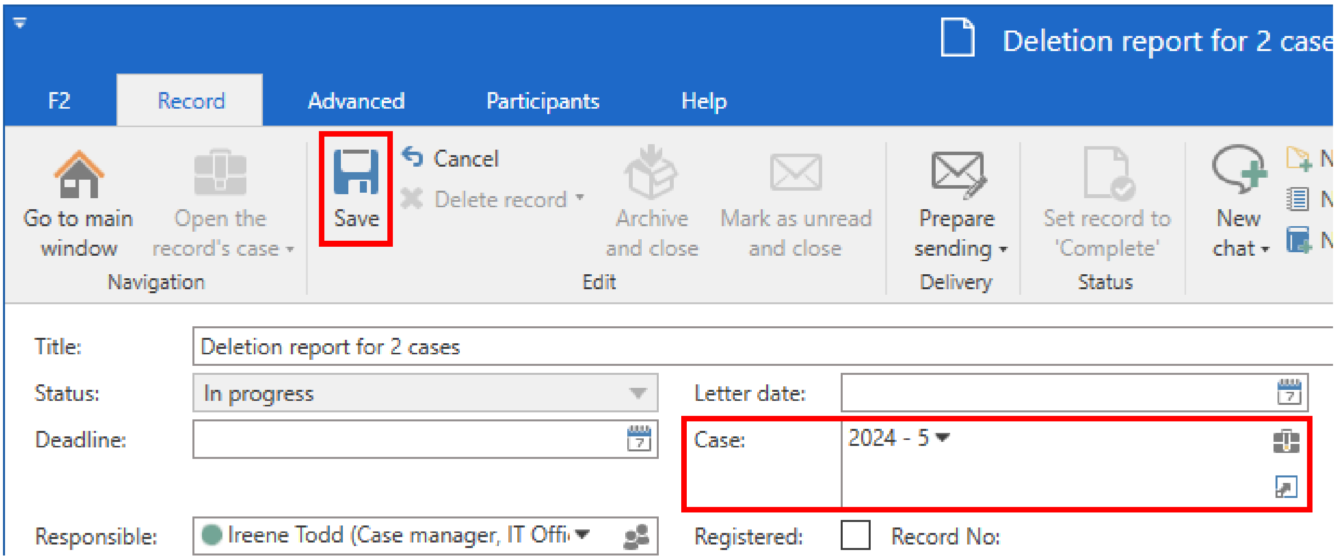


Figure 5. Add record to existing case

NOTE Suggestions in the “Case” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

NOTE Through a configuration, it is possible to allow users to add records to closed cases. When enabled, the titles of closed cases are italicised. For more details on case configurations and closed cases, click here.

Adding a record to a new case

Creating a new case from the current record can be done in the following ways:

- Type “new” or “+” in the “Case” metadata field and press **Enter**. This opens the “New case” dialogue as shown below.

- Click the case icon in the “Case” field. The “Choose cases” dialogue opens. In this dialogue, click **New case**. For further information, see the section The “Choose cases” dialogue.

Both ways lead the user to the following dialogue:

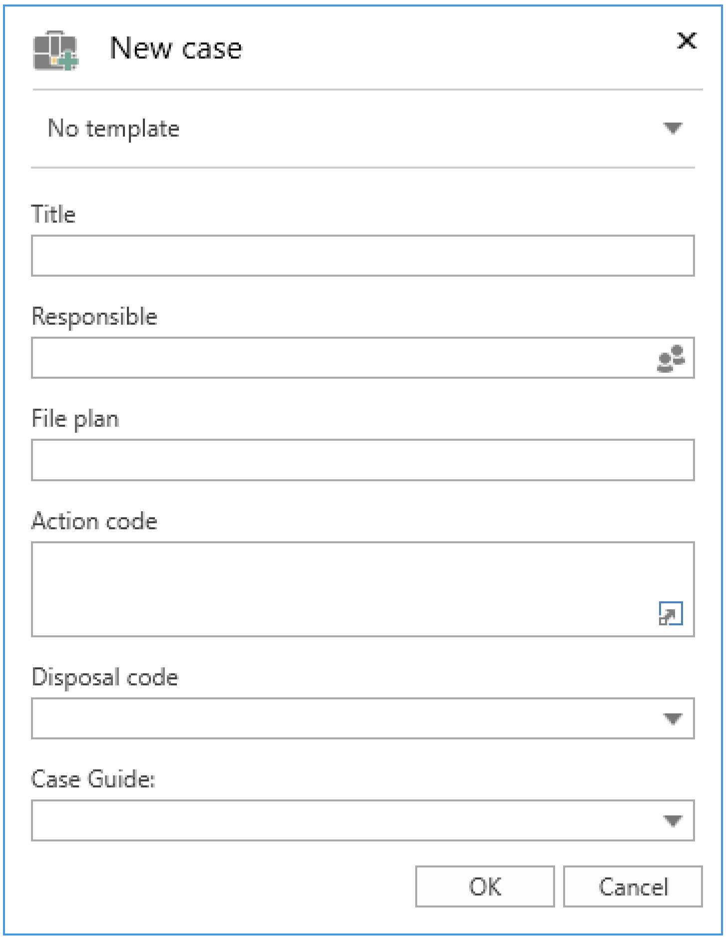


Figure 6. The “New case” dialogue

In the “New case” dialogue, the user enters the case title and other relevant metadata such as file plan, action code, disposal code, or case guide (add-on). Depending on F2’s configuration it may also be possible to choose a case template (add-on) that determines which metadata fields to fill in.

When the fields are filled in, click on **OK** to create the case. For further information on the case window and working with cases, see Cases.

NOTE	Depending on F2’s configuration and the organisation’s guide lines, some fields may be obligatory. Certain fields may also be filled in automatically.

The “Choose cases” dialogue

Click the case icon in the “Case” field on a record to open the “Choose cases” dialogue. This dialogue contains the same search options as F2’s main window. These are used for adding one or more cases.

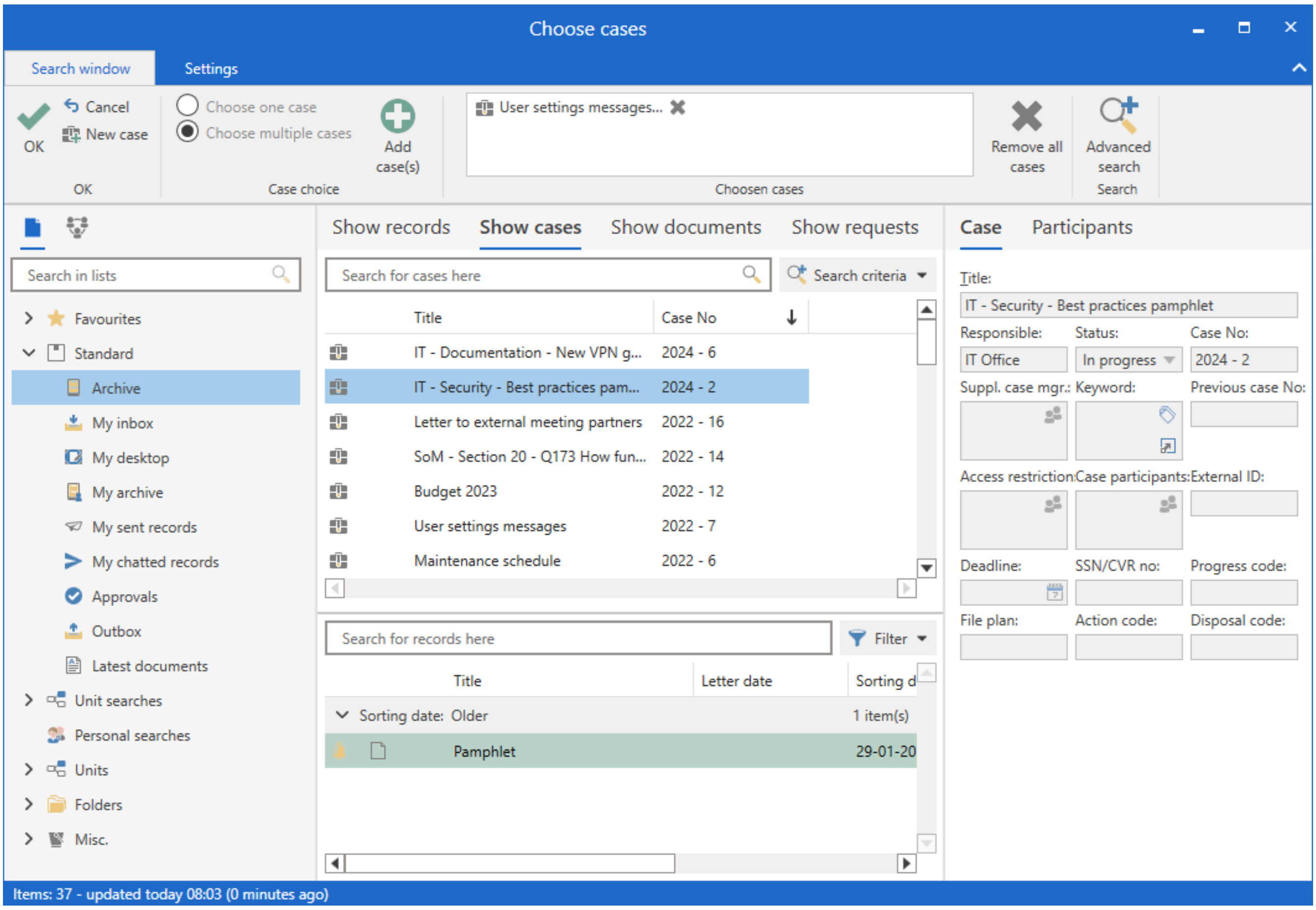
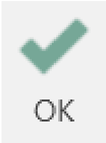
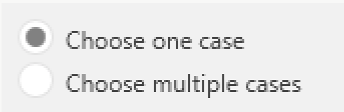


Figure 7. The “Choose cases” dialogue

The “Search window” tab in the dialogue ribbon offers the following options:

Function	Description
	Click on **OK** when one or more cases have been selected in the result list or are displayed in the “Chosen cases” field. The record is then added to the chosen case or copied to the chosen cases.
	Close the dialogue without adding the record to a case.
	Open the “New case” dialogue from which a new case can be created.
	Click **Choose multiple cases** to display the “Chosen cases” field. When this field is visible, the function is inactive regardless of the number of cases shown in “Chosen cases”. F2 automatically switches when the user selects one or more cases and clicks **Add case(s)**. If all cases are removed from the “Chosen cases” field, F2 automatically switches back to **Choose one case**. This makes it easier to see if the record is being added to one or several cases.
	Add the case(s) selected in the result list. The selected case(s) can be seen in the “Chosen cases” field in the dialogue ribbon shown in the “Chosen cases” field in the dialogue ribbon.
	The “Chosen cases” field shows cases the user has selected. **NOTE** If a record is already added to a case, that case is shown here when the dialogue is opened. To remove a case from the field, click the  next to its title.
	Remove all cases from the “Chosen cases” field in the dialogue ribbon.
	Perform an advanced search using metadata fields. For further information, see Searches.

In the “Choose cases” dialogue the user can search for the cases to which the record must be added.

If the record must be added to a single case, select the case and double-click to transfer it to the record's case field.

If the record must be copied to multiple cases, click **Choose multiple cases** in the dialogue ribbon. Then search for the relevant cases and add them to the "Chosen cases" field. Click on **OK** to add the cases to the record's case field.

If several cases have been selected, a copy of the record is added to the second case, the third case, etc. This is shown in the dialogue below which opens when the record is saved via the record window ribbon.

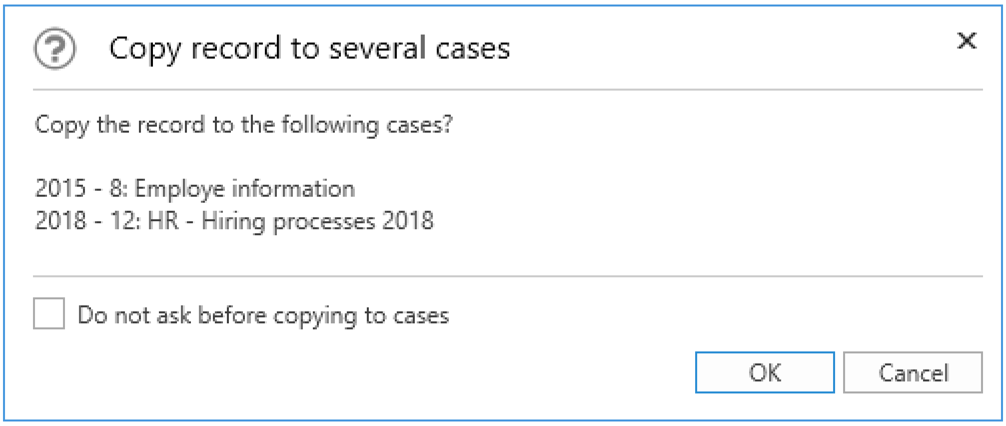


Figure 8. The "Copy record to several cases" dialogue

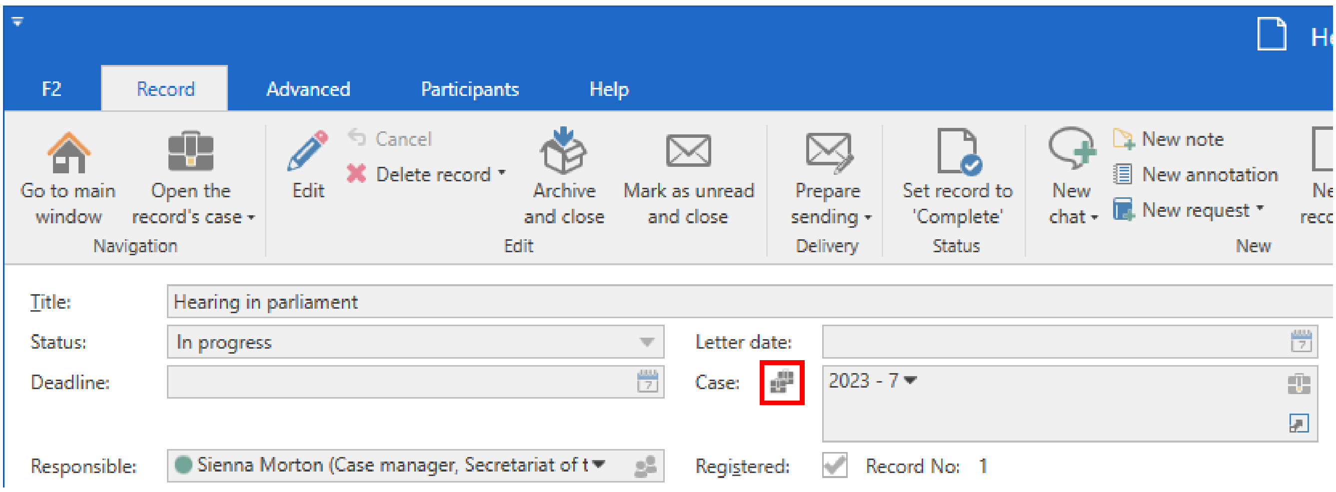
Click on **OK** in the dialogue to copy the record to the selected cases.

To skip this dialogue in the future, tick the box next to "Do not ask before copying to cases" before clicking on **OK**.

NOTE A user may remove a record from a case and add it to another if they have full write access. A user may also remove a record from a case without adding it to a new case.

Records with copies on multiple cases

When a record has been copied to multiple cases, the user may view its copies in the record window. This is done by clicking on the cases icon next to the "Case" field.



The “Copy overview” dialogue will open, showing all cases to which the record has been added. The overview shows the following information:

- Case number
- Case title
- Record ID
- Record title
- Created (date)
- Created by (user).

The blue highlight shows the record that is currently open.

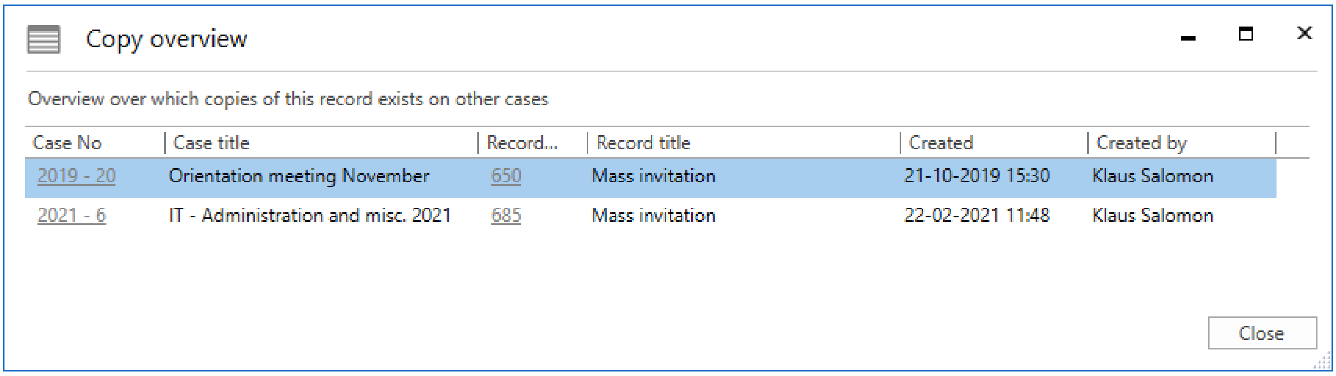


Figure 10. “Copy overview” dialogue

It is possible to access the case or record copy by clicking on either case number or record ID.

Standard behaviour when closing cases

When a case is closed by a user with the necessary rights (write access to all records on the case), the case records are affected in the following ways:

- All case records are completed.
- The metadata and documents on the record cannot be edited further. Practically, this means the **Edit** menu item is disabled, which also disables editing the record document and sending the record as an email.
- To reopen a record, its case must first be reopened. This requires the privilege “Reopener case”.

Read more about F2’s standard behaviour for closing cases.

Record metadata

The visible record metadata fields depend on your personal settings. A record can be displayed with:

- Email metadata fields (i.e. metadata fields used when sending an email), see the Email delivery metadata fields section.
- Standard metadata fields, see the Standard metadata fields section.
- Advanced metadata fields, see the Advanced metadata fields section.

Adjust which metadata fields that are displayed by clicking **Show all fields** in the record window ribbon.

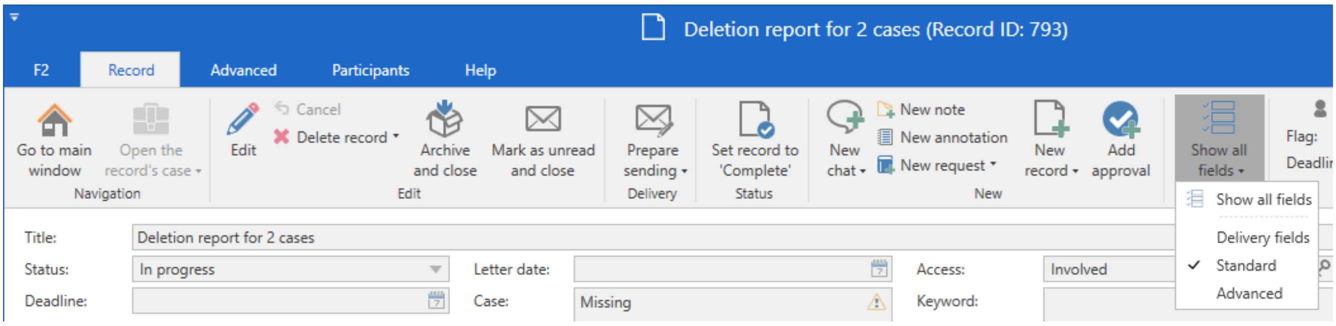


Figure 11. Show all record fields

Various metadata associated with a given record depend on its status and the user's rights.

The following sections describe the metadata fields and how certain record metadata are managed.

You can only edit metadata on a record if you have full write access.

Email delivery metadata fields

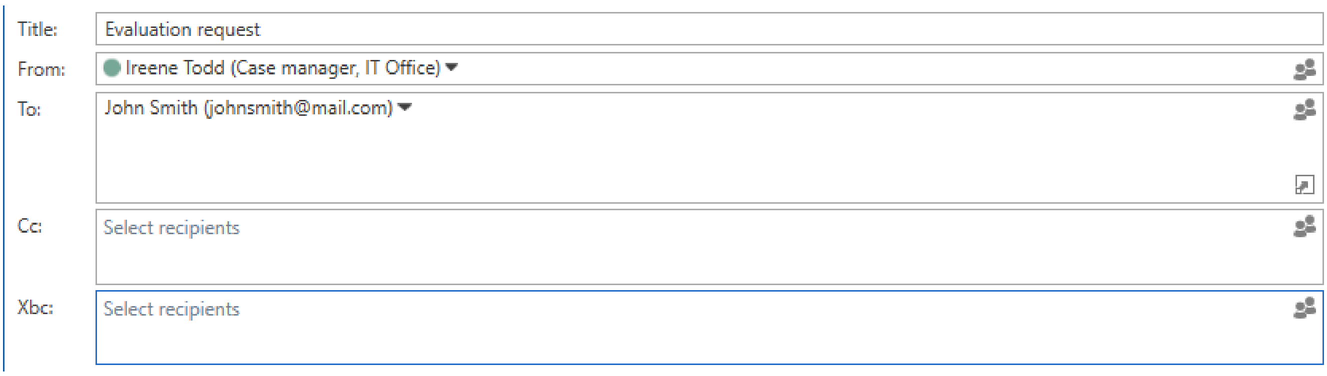


Figure 12. Email delivery fields

The email delivery metadata fields are described below. For further information on creating and sending emails, see the Email section.

Field	Description
“Title”	“Title” is shown in every metadata field view. It is a free-text field describing the record. A title is entered when the record is created. It may be changed later. On an email the title is identical to an email’s subject field.
“From”	The sender of the email. This field is filled in automatically when the user starts typing in the “To” or “Cc” field.
“To”	Enter any recipients of the email here.
“Cc”	Enter any Cc recipients of the email here.
“Xbc”	Enter any Xbc recipients of the email here. Adding an external participant here is similar to adding a recipient in Bcc in traditional email systems. **NOTE** There is no difference between adding an internal participant here and in Cc. Xbc is not hidden for other F2 users and only affects outgoing external emails.

NOTE Suggestions in the “To”, “Cc”, and “Xbc” fields can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.

Standard metadata fields

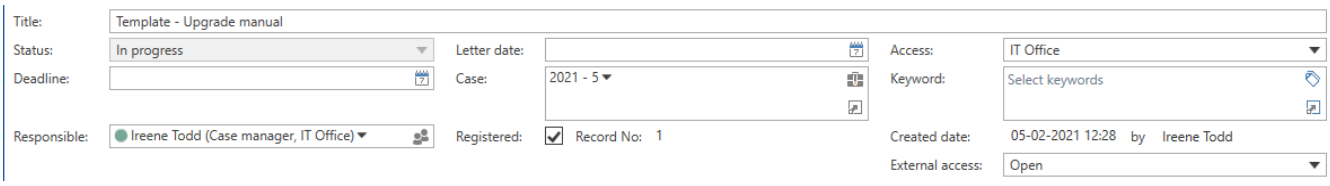


Figure 13. Standard metadata fields

The metadata fields shown on a record in non-expanded mode are reviewed below.

Field	Description
“Title”	“Title” is shown in every metadata field view. It is a free-text field describing the record. A title is entered when the record is created. It may be changed later.
“Status”	The status of a record indicates whether it is “In progress” or “Completed”.
“Deadline”	In this field a deadline is set on the record. This value is used e.g. in searches and for sorting lists.
“Responsible”	The “Responsible” field specifies the user or unit formally responsible for the record. Read more here.
“Letter date”	If the record has been sent or received, it has a letter date. This is the date on which the record was sent or received in F2. In case of a scanned physical letter, the user can add a letter date in this field, which should correspond to the date on the physical letter.
“Case”	If there is a case number in this field, the record has been added to a case. If the field is empty, it can be added to a case from here. If a record is already added to a case, it may be moved to another by replacing the case number. The user may also remove the record from a case if they have the required rights. In order to remove a record from a case, delete the case number from the “Case” field. Adding the record to a new case is not required. If a record must be added to a known case, enter the case number or case title in this field. Then select the case and press **Enter** or double-click. For further information, see the section Adding a record to a case. A case contains its own set of metadata. Read more about working with cases. **NOTE** Suggestions in the “Case” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
“Registered”	In some public organisations, a tick in the “Registered” field means that the record will be included in deliveries to the National Archives or similar institutions.

Field	Description
	Private organisations may use this field to indicate particularly important records that may not be deleted. In addition this field, like any other record metadata, is used for miscellaneous searches, groupings, etc.
“Record no.”	When a record is registered, a record number is allocated consecutively within a case. This means that only registered records added to a case have a record number.
“Access”	Here the user selects the access level for the record: • Involved • Unit • All. If a record is subject to an access restriction in the “Access restricted to” or “Case access restricted to” fields, an asterisk “*” is shown in the “Access” field. Read more about access levels on records and how they are changed.
“Keyword”	Here the user can add predefined keywords to the record. Keywords can be added in three different ways: • Start typing in the field, and F2 will search for matching keywords. If there are any keywords specific to the unit, only these will be shown. • Press the **down arrow** key to display a list of available keywords. If there are any keywords specific to the unit, only these will be shown. Press **Enter** or double-click to select a keyword. • Search all keywords. Click the icon in the “Keyword” field to open a dialogue showing all keywords available to the authority. From here, select a keyword and add it to the right panel with the right arrow button. Click **OK** to close the dialogue and add the selected keywords.
“Created date”	This field shows the date when the record was created and by whom. **NOTE** For incoming emails, the “Created date” denotes when the record was imported into F2.

Advanced metadata fields

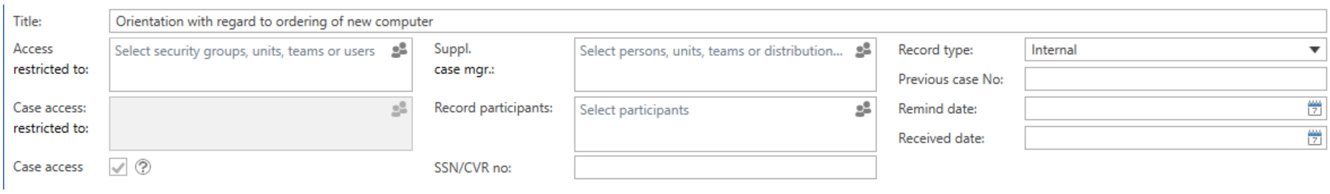


Figure 14. Advanced metadata fields on a record

The advanced record metadata fields are described below.

Field	Description
"Title"	"Title" is shown in every metadata field view. It is a free-text field describing the record. A title is entered when the record is created. It may be changed later.
"Access restricted to"	Any access groups (users/teams/security groups, etc.) for the record are specified here. This field limits the access to the listed users and groups. Regardless of the record's access level as specified in the "Access" field, only users/groups that have been added to this field can access the record. However, the access level is still in effect, which means that anyone added to this field must also be included in the record's access level. Read more about restricting access to a record. **TIP** If a user adds a security group to a record which already has one or more security groups, the number of users who can access the record will increase. **NOTE** When an access group is added or removed, the log will show which user made the change and when.
"Case access restricted to"	Any access groups on the record's case are shown here. This field is empty unless three conditions are met: the record is added to a case, "Case access" is ticked, and the case has an access restriction. If the above criteria are met, F2 automatically transfers the users, units, teams and/or security groups from the case access restriction to this field. **WARNING** If a user with restricted access (in the user properties) is added to the "Access restricted to" field, either the authority, a unit, or the user's security group must also be added to this field, and the "Access level" must be "All". Otherwise, access to the record is reduced to the restricted access user.

Field	Description
	NOTE The “Case access” field is automatically ticked upon a record’s creation even if it is not attached to a case. A caseless record is implicitly access restricted to the user’s authority.
“Suppl. case mgr.”	Add any supplementary case managers on the record here. These are users, teams and/or units that help with the case proceeding without being responsible for the record. For further information on adding supplementary case managers, see the section Adding a supplementary case manager.
“Record participants”	Add participants other than the sender, recipient, case manager, supplementary case manager, and the responsible participant to the record. **NOTE** Suggestions in the “Record participants” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain.
“SSN/CVR no.”	Add an SSN or CVR number to the case.
“Record type”	Used to distinguish between records sent to external participants, received from external participants or for internal work. The following record types are available: • “Outbound” If an email is sent to an external participant, the record type is automatically set to “Outbound”. • “Inbound” If an email is sent from an external participant, the record type is automatically set to “Inbound”. • “Internal” All records for internal work and communication are automatically assigned the record type “Internal”.
“Previous case no.”	If the record was added to another case or exists in another system, the original case number is shown here. This field can also be filled in by the user.

Field	Description
"Received date"	This is the date when the record was received. This is set automatically if the record is sent electronically. If the record originated as a physical letter, it is possible to enter the received date manually. This is useful for distinguishing the date printed on the letter from the date it was received. If the record is sent electronically, a value identical to the letter date will be entered automatically in this field.

Metadata fields on a record with the unit casework line

A user is able to monitor the recipient's processing of a record sent to users or units with the "Send" function. This is done from the record window's "Advanced" tab by ticking the "Unit casework line" box before sending the record.

When a record is sent to an internal user or unit, the "Unit casework line" is created for each recipient, both users and units.

The "Unit casework" line only appears when the record is sent. It is visible when the advanced metadata fields are shown. The line is always visible to the recipients regardless of which field of groups are displayed.

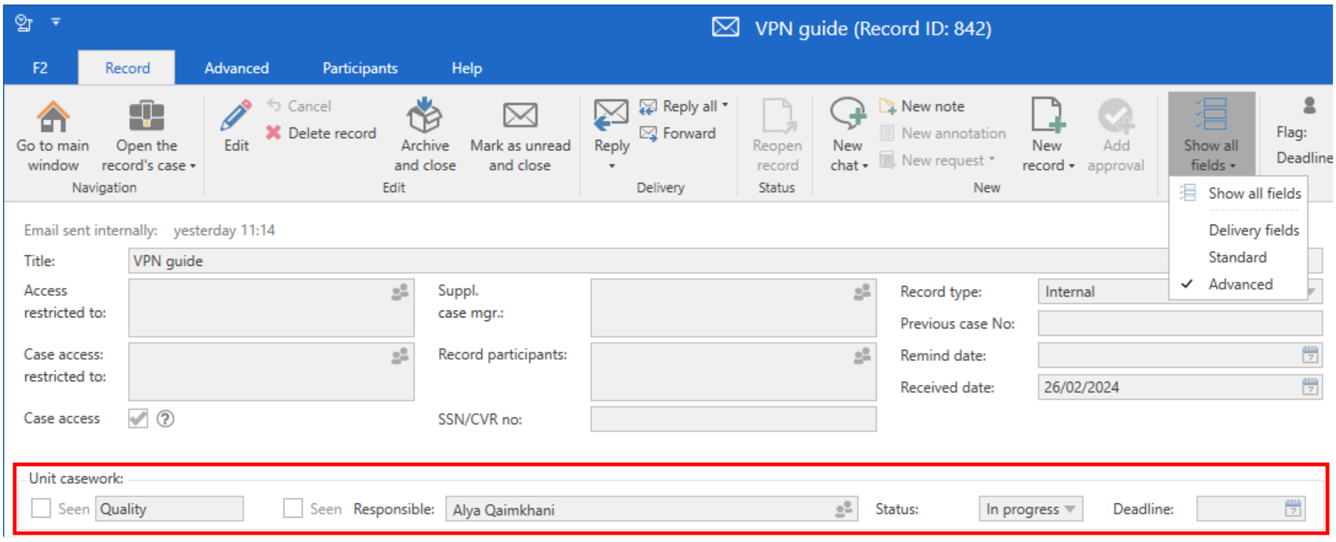


Figure 15. Record metadata fields including the unit casework line

Read more about using the unit casework line.

The metadata fields of the unit casework line are described in the table below.

Field	Description
"Seen" (by unit)	Indicates whether a user in the unit has seen the record.
"Seen" (by responsible user)	Indicates whether the responsible user has seen the record.
"Responsible"	The "Responsible" field specifies the user who is responsible for the record in the recipient unit. If a record is sent to a specific user, their unit is displayed here until they have seen the record.
"Status"	The recipient specifies the record status in the receipt registration. This informs the sender whether the record has been completed or is still in progress.
"Deadline"	Here, the record recipient adds a deadline. Update the "Deadline" field by clicking on the calendar icon to the right of the field or by entering the date in dd-mm-yyyy or a corresponding format. A user can also enter a date by typing e.g. "+10" to set a deadline 10 days from the current date. When the user leaves the field, F2 automatically changes the format to dd-mm-yyyy. Consequences of editing a deadline: The record will be included in the standard searches "Deadline tomorrow: Me" and "Deadline tomorrow: Unit" when appropriate.

The record document

The following sections describe the record window, which is the default document shown in the record editor pane.

The record editor pane

The record editor pane is shown below the record metadata fields.

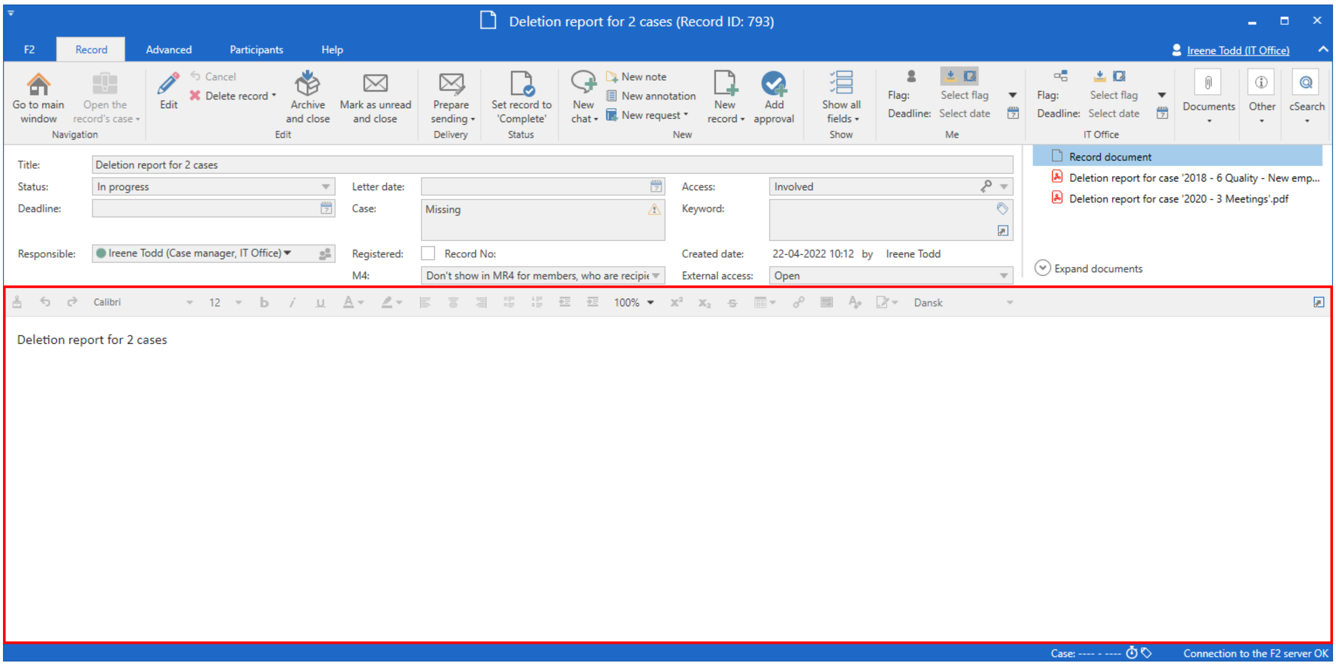
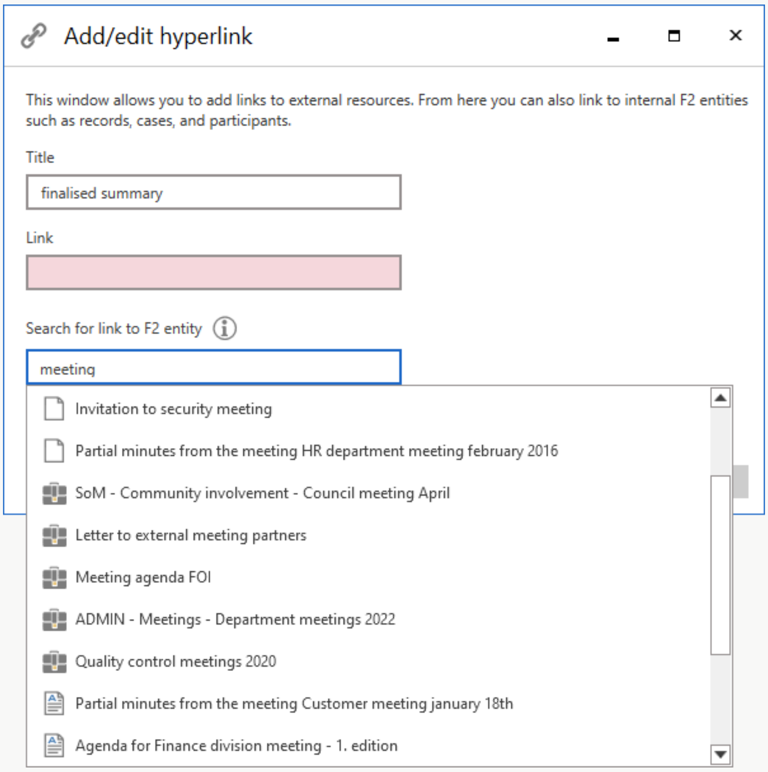
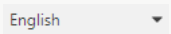


Figure 16. The record editor pane

This is a standard text editor with common functions such as font types, sizes, colours, etc. Here the user enters the text of the record document.

Note the following functions:

Icon	Function	Description
	Undo/Cancel undo	Clicking on the left arrow cancels the last action in the editor. Clicking on the right arrow cancels the last undo action. These functions work as long as the changes have not been saved.
	Add/Edit hyperlink	Add or edit a hyperlink in the editor. Clicking the icon opens the “Add/edit hyperlink” dialogue. Here you enter the text/title in the “Text display” field and the URL itself in the “URL” field. You can also search for F2 entities such as records and documents in the dialogue. Enter your search term in the "Search for link to F2 entity" field. Once you have found the relevant entity, double-click it to add its link to the link field. If you have not already entered something in the "Title" field, it will automatically be filled in with the entity’s name.  *Figure 17. Search for F2 entities. The icons indicate each result’s type* You can refine your entity search by using prefixes. Use "r:", "c:", "d:", or "p:" to limit your search results to records, cases, documents, or participants, respectively. Click **OK** to create the text as a hyperlink in the record

Icon	Function	Description
		document. The hyperlink becomes active when the record is saved.
	Insert signature	Click **Insert signature** to open a drop-down menu containing available email signatures. Read more about signatures.
	Language selector	Select language for the editor in the drop-down menu. The language in the editor affects its spell checker and context menu. The default options are Danish and English, but other options can be added via configuration. F2 is configured in cooperation with cBrain.

NOTE F2’s default configuration is the Calibri font with single line spacing.

The text editor’s context menu contains options for default language and spell checker in addition to options for the direction of writing.

Right-click a URL or f2p link to open the link in a new window regardless of the record’s state.

Figure 18. A selection of options in the editor's context menu

NOTE

The **Add to dictionary** function can be added to the context menu through a configuration. Once you have also enabled the function through the "Use new record editor" personal setup, you can add unknown words in the record editor pane to your dictionary. Configurations are made in cooperation with cBrain.

Print the record document

Select a record in the main window result list and click on **Print**. F2 then generates a PDF file of the record document and opens a print dialogue. The content of the PDF file is determined by a template which can be configured in cooperation with cBrain.

The generated PDF file only contains the record document.

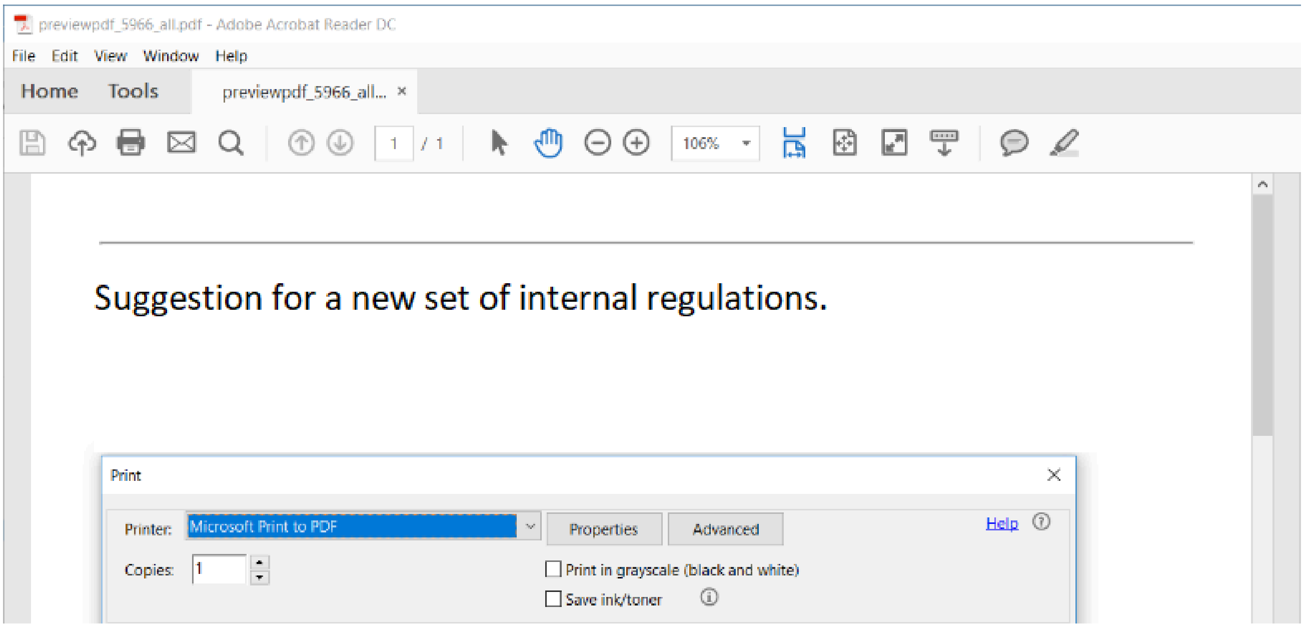


Figure 19. Print record document

Record and document cooperation

Records and their attached documents can be opened in edit mode independently of each other. This means that different users can edit the record and its documents simultaneously. However, users cannot edit the same object (record or document) at the same time.

NOTE Only a limited range of file types can be edited in this way. The file types from the Office package are included by default. The range of file types can be configured in cooperation with cBrain.

Edit record and documents separately

When you open a record or document in edit mode, only the relevant record or document opens for editing. This means, for example, that you can work on an attached document while another user can simultaneously edit the record metadata without affecting your work.

Example: Ann needs to write a letter to a citizen. She right-clicks the document that constitutes the letter and selects **Edit Document** to begin her work. Meanwhile, Ben realises that the access level of the record is incorrect. He clicks **Edit** in the record window's ribbon to edit the record and its metadata. Ann is also cooperating with Carla on an appendix to the letter. Carla double-clicks on the attached document and chooses to open it in edit mode to work on the content. Ann's work on the letter is unaffected.

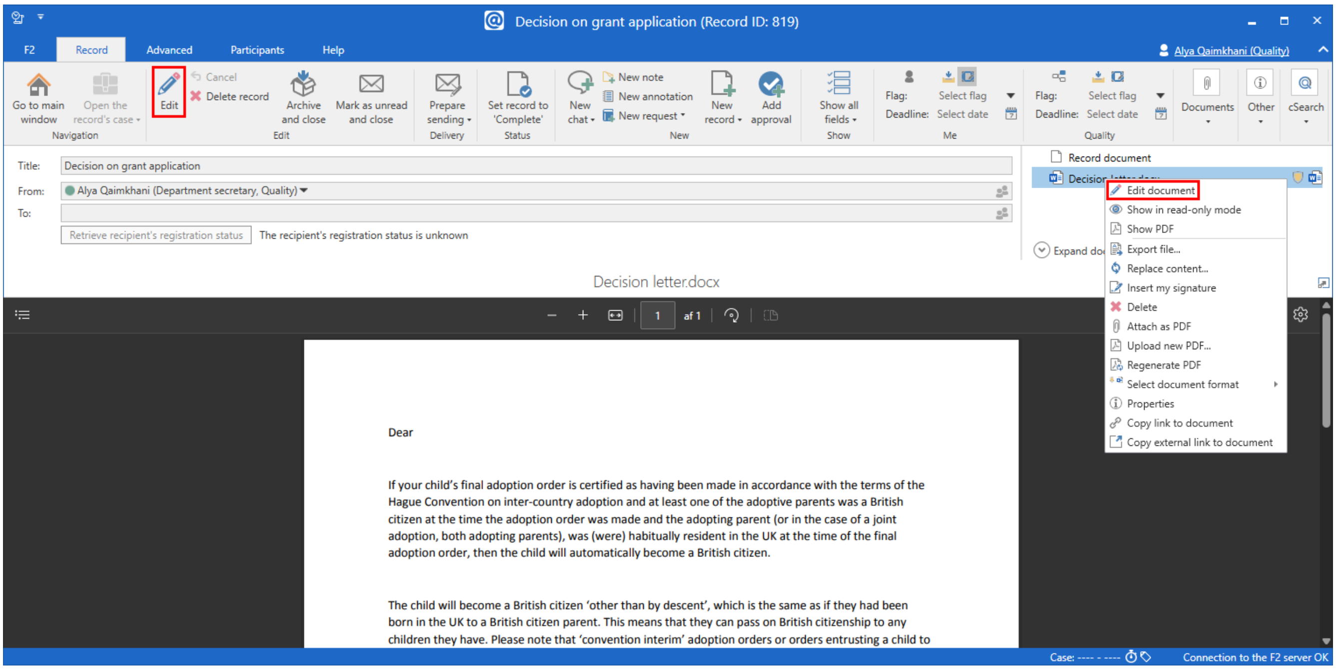


Figure 20. Edit record and its documents separately

You need write access to documents to edit a record's attached documents and full write access to the record to edit its metadata.

NOTE When a record is in edit mode, it also applies to its record document and approval documents, if any. This means it is not possible for one user to edit the record document while another edits the record's metadata.

F2 uses pencil icons to indicate that someone is editing an attached document. You can see the icon on attached documents in the document area or preview in all F2 windows. Hover the cursor over the document to see a tooltip detailing who is editing the document and when they started their work.

Example: Carla is working on an appendix to a letter, both Word documents. She wants to add a reference to the appendix in the letter's text, but she can see in the record's document area that another user is already editing the document. She hovers the cursor over the letter, and a tooltip tells her that her colleague Sienna started editing the record a couple of hours ago. Carla knows that if she opens the letter to edit it, Sienna risks losing two hours of work. When Sienna finishes editing the document, saves and closes it, the document's icon is immediately updated, showing Carla that she can safely open and edit the letter.

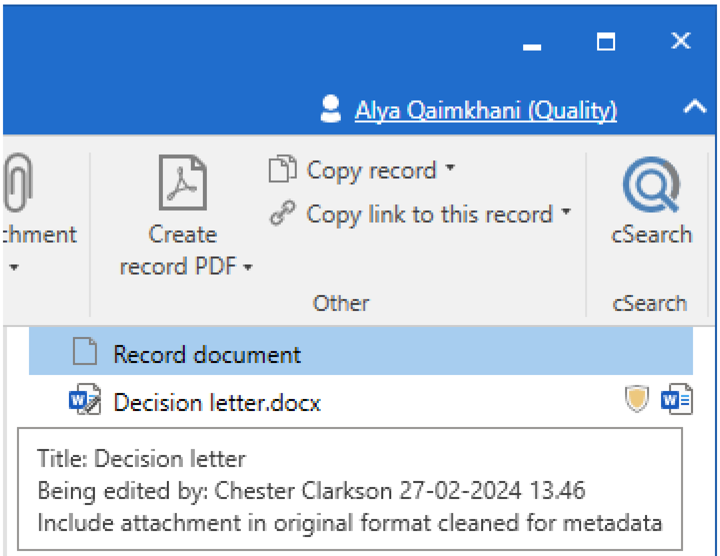


Figure 21. A document's pencil icon and tooltip in record preview

You can also choose to take over a document from another user.

Take over a record

When another user is editing a record, the **Edit** menu item changes to **Take over editing** in the ribbon. This shows you that the record is being edited, and you have the option to take over. If you take over a record, the other user may not be able to save their changes.

You can only take over a record from another user if you have full write access to the record.

TIP It is good form to chat your colleague before taking over work on a record.

Click **Take over editing** to take over a record, including its record document and approval document, if any.

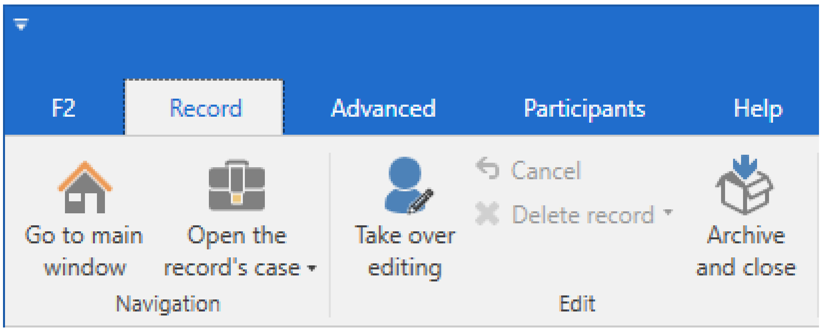


Figure 22. The "Take over editing" menu item in the record ribbon

The dialogue "Another user is editing the record" shows you the name of the user currently editing and when they started. Click **Take over editing** to continue.

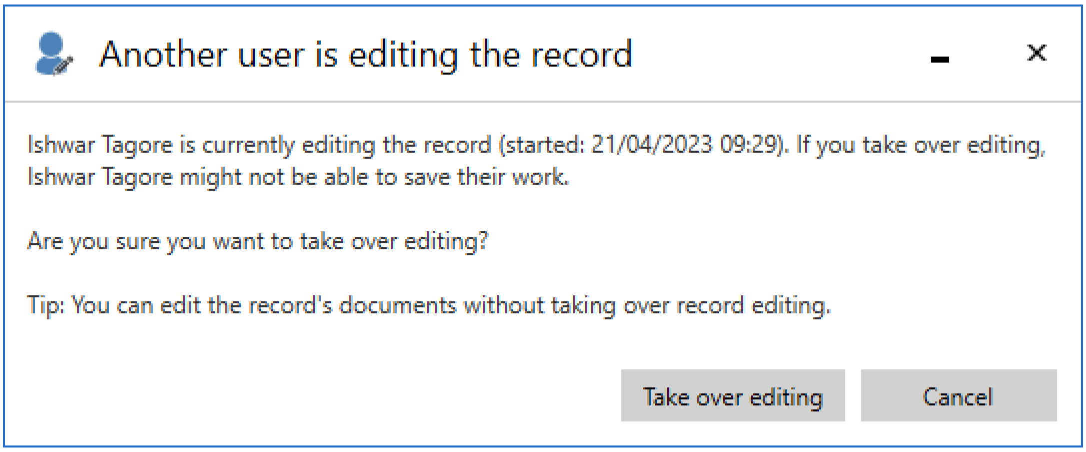


Figure 23. The dialogue "Another user is editing the record"

NOTE If you have taken over editing by mistake, you can undo it. Click **Cancel** in the ribbon, and the user you took over the record from regains the option to save their work.

When you take over editing, the other user is immediately notified by F2 that you have taken over the record.

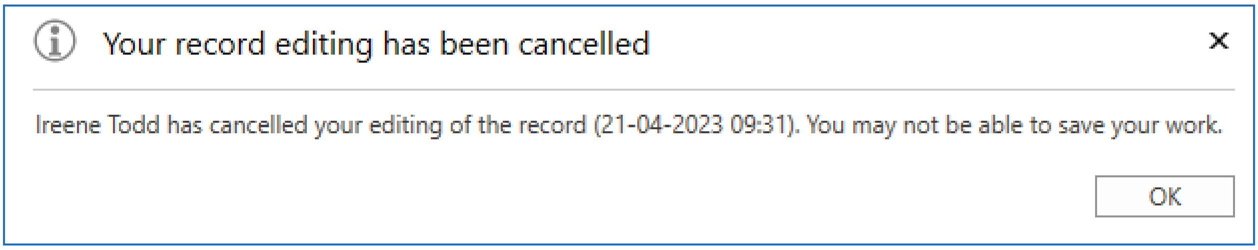


Figure 24. The other user is notified when you take over the record

The user you took over from cannot save their changes but can click **Cancel** in the record’s ribbon to discard them. They can then close record.

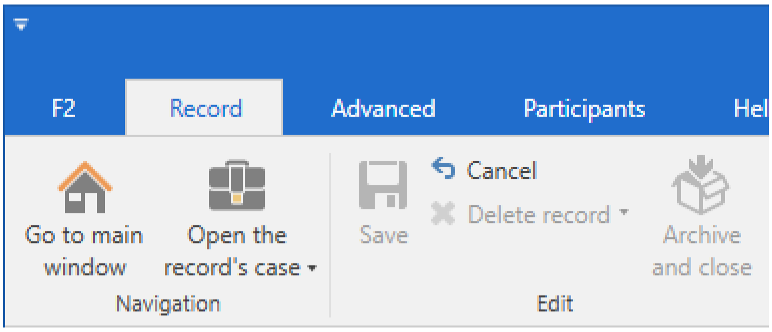


Figure 25. The "Cancel" menu item in the record ribbon

If the other user attempts to save their changes after you have stopped editing the record, F2 will tell them that a newer version of the record exists. The user can click **Yes** in the dialogue to undo their changes and show the latest version of the record.

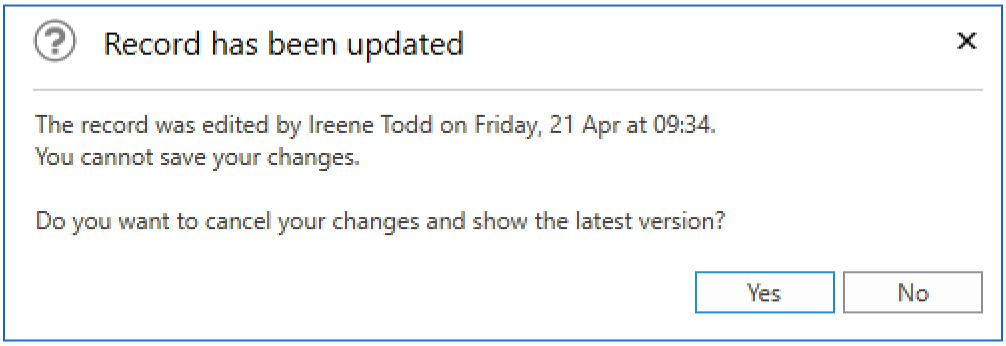


Figure 26. The "Record has been updated" dialogue

It is also possible to take over the record’s attached documents.

Menu items on the record ribbon

Menu items for working on the record are found on the record ribbon.

Many functions pertaining to a record depend on its status and the user’s access level.

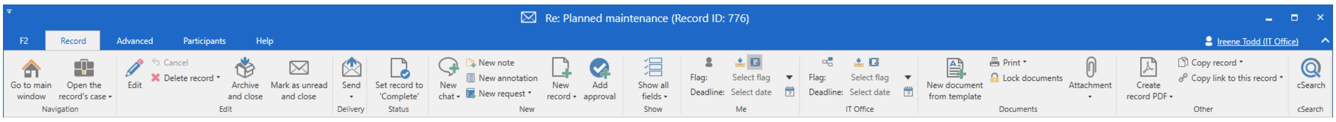
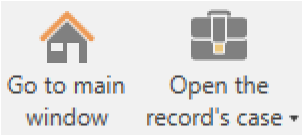
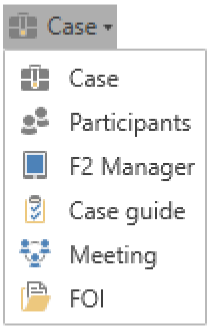
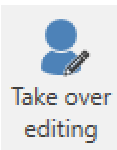


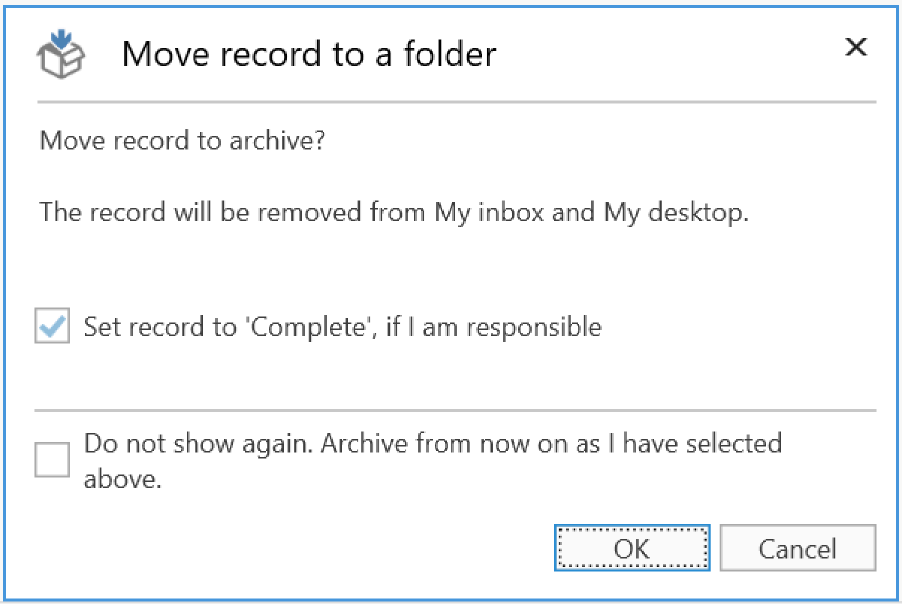
Figure 27. Menu items of the record ribbon

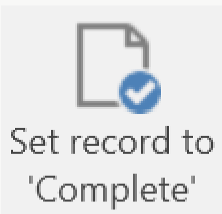
You can customise the ribbon in the window "Customise toolbar and ribbon".

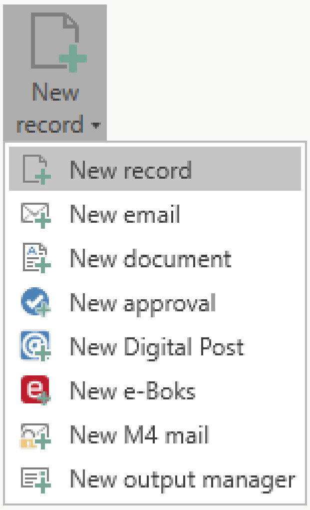
The table below describes the menu items on the record ribbon.

Menu item	Description
	Navigate between the main and case windows by clicking one of them. By clicking the drop-down arrow next to “Case”, it is possible to navigate to the case tabs “Case” and “Participants”. If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under **Case** as shown below.  *Figure 28. Drop-down menu for “Case”* It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode.
	When a record is in read-only mode, click the **Edit** button to make changes to the record document, its attachments, and its metadata fields. When a record is in edit mode, the **Edit** menu item is replaced with the **Save** item. If another user is editing the record, the **Edit** menu item is replaced with the **Take over editing** item.
	You can take over work on a record including its record and approval documents by clicking **Take over editing** in the ribbon. The menu item is shown when another user is editing the record. The other user is notified when you take over the record. Read more about taking over work on a record.
	Save changes to the record document, its attachments or its metadata fields by clicking **Save**. The record cannot be saved if a validation error is found. This error occurs e.g. when an invalid value has been entered into a metadata field. The field will turn red and the **Save** button becomes inactive.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>fields. This does not affect changes made to the record title or any attached documents.</td></tr>
<tr><td>
</td><td>
Depending on whether the record has been shared, Delete record works in two different ways.
When the user deletes a record, F2 asks the user to confirm this action.
Users with the privilege “Can delete shared records for everyone” have the option to Delete for everyone via a drop-down menu.


Figure 29. Drop-down menu for “Delete record”
Read more in the Delete record section. </td></tr>
<tr><td>
</td><td>
This menu item is visible when a record has been deleted and then opened from the “My deleted records” list.
Before a record is restored, F2 asks the user to confirm this action. </td></tr>
<tr><td>
</td><td>
This button helps the user “tidy up” the record by removing it from the user’s inbox and desktop.
If the user has the responsibility for the record, the record’s status can be changed from “In progress” to “Completed”.
When the user archives a record, the following dialogue appears.

</td></tr>
</table>

Menu item	Description
	Figure 30. “Move record to a folder” dialogue
	Click on **Mark as unread and close** to close the window and mark the record as unread. You can use the function to keep track of records you need to get back to later. Combine the function with flags and personal searches to maintain an accurate overview of everything you receive and which actions you need to take.
	Click “Prepare sending” to display the delivery metadata fields used for sending the record as an email. When adding a recipient, this menu item changes to either “Send” or “Send securely”, depending on the configuration. For further information, see below.
	The “Send” menu item is used to send an email (internally or externally). “Send securely” is a configuration with which an encrypted email can be sent from F2 to external recipients. The security level of emails sent internally in F2 is already correspondingly high, so internal emails need not be sent using this function. Use of this function presupposes that the organisation has a third-party provider to sign and encrypt the emails F2 marks as “Send securely”. Emails sent securely are marked with the  icon. F2 is configured in cooperation with cBrain.
	Changes the record’s status from “In progress” to “Complete”. When the record is completed, this menu item changes to “Reopen record”, which is described below.
	Reopen a record. Changes the record status from “Complete” to “In progress”.

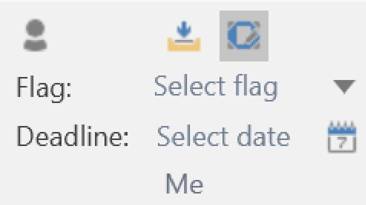
Menu item	Description
	For further information on notes, see the Notes section.
	Open the “New annotation” dialogue. For further information on notes, see the Annotations section.
	Open the “New request” dialogue from which a new request can be created. Select either a regular request or a group request via the drop-down menu. Both types are add-on modules and respectively enable: • Internal requests: Internally in one F2 authority. • Group requests: Between two F2 authorities on the same installation. For further information, see Request and Group Request.
	Click on **New record** to open the “New record” dialogue. For further information on this dialogue, see the Creating a new record section. Click the drop-down arrow to open a menu with the following items: • New record • New email • New document • New approval (add-on module) • New Digital Post (add-on module) • New e-Boks (add-on module) • New M4 mail (add-on module) • New output manager (add-on module). Each menu item creates a new record whose metadata are adjusted according to the selected type. The submenu items are described below.
	Create and open a new email with the user as sender. For further information on creating and sending emails, see the Email section.

Menu item	Description
	from template section. **NOTE** The newly created record inherits the title from the attached document.
New approval	Open the “New approval” dialogue from which a new record with an approval can be created. F2 Approvals is an add-on module. For further information, see Approvals. The “New approval” dialogue offers the same options as when creating a new record. These are described in Creating a new record.
New Digital Post	Open the “New Digital Post” dialogue from which a new Digital Post can be created. Requires the add-on module F2 Digital Post (Next Generation). Read more here. The “New Digital Post” dialogue has the same options as the “New record” dialogue. These are described in Creating a new record.
New e-Boks	Open the “New e-Boks” dialogue from which a new Digital Post for e-Boks can be created. Requires the add-on module F2 Digital Post (e-Boks). Read more in here.
New M4 mail	Open the “New M4 mail” dialogue from which an M4 mail can be created. Requires the add-on module F2 Digital Mail (M4). The “New M4 mail” dialogue has the same options as the “New record” dialogue. These are described in Creating a new record.
New output manager	Open the “New output manager” dialogue from which a new record with an output manager can be created. Requires the add-on module F2 Output Manager. The “New output manager” dialogue has the same options as the “New record” dialogue. These are described in Creating a new record.

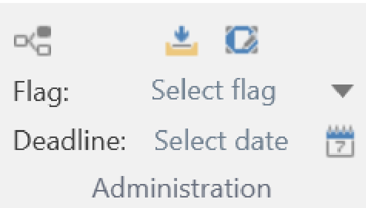
<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>information, see the Settings and Setup.

The “Show all fields” drop-down menu lets the user choose between the following groups of metadata files:

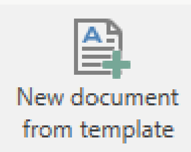
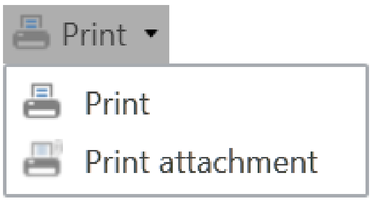
• Delivery
• Standard
• Advanced.

These fields are described in Record metadata.</td></tr>
<tr><td></td><td>A user has several managing options for records in F2:

• Placing record
• Flagging a record
• Deadline for a record.

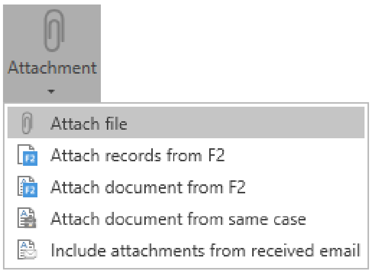
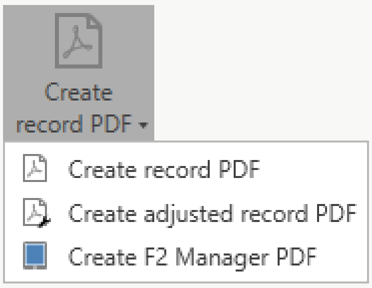
These options are described in further detail in Personal management.</td></tr>
<tr><td></td><td>A user has several managing options for records on behalf of his/her unit in F2:

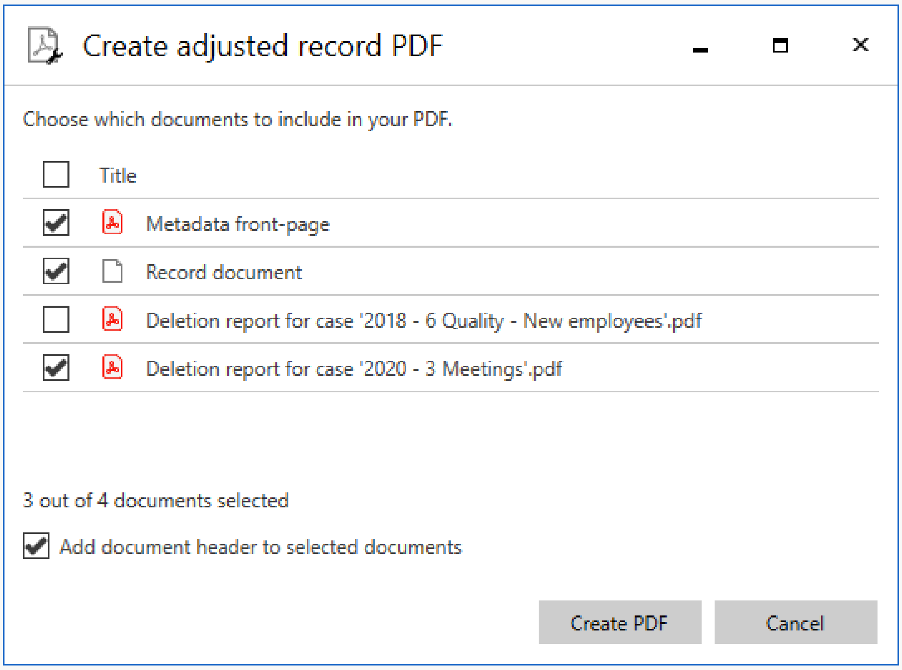
• Unit’s placement of a record
• Unit’s flagging of a record
• Unit’s deadline for a record.

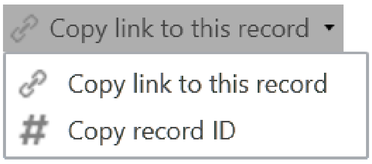
These options are described in further detail in Unit management.</td></tr>
<tr><td></td><td>Open the “New document” dialogue from which the user can add a document template to the record. Read more in the New document from template section.</td></tr>
<tr><td></td><td>Two print options are available for a record:

• “Print”:
Use this option to print only the record document and its metadata.

• “Print attachment”:
Use this option to print one of the record’s attached documents. This menu item is only active if the user has selected an attachment.</td></tr>
</table>

Menu item	Description
	Figure 31. Documents are locked Locked documents cannot be edited until they are unlocked by the same user or another user with full write access to the record. The locked state cannot be changed if the record has been sent or received as an email. In this case, the menu item is deactivated:  *Figure 32. Documents cannot be unlocked* **NOTE** Locking a record’s documents includes the record document itself.
 	Open Windows File Explorer to select a file and attach it to the open record. Clicking the drop-down arrow opens a menu with the following menu items: • Attach file • Attach records from F2 • Attach document from F2 • Attach document from same case • Include attachments from received email. The menu items are described in the Attaching documents section.
 	Create a PDF version of the record and its attachments. Click the drop-down arrow to display a menu with the following items: • Create record PDF • Create adjusted record PDF • Create F2 Manager PDF. The created PDF will open automatically in the programme associated with PDF files. Each menu item is described below.

Menu item	Description
	Figure 33. PDF file created from record **NOTE** The template used when generating the PDF can be adapted to the organisation’s needs. Configurations are made in cooperation with cBrain.
Create adjusted record PDF	Opens the “Create adjusted record PDF” dialogue. Here the user selects which documents to include and whether a header for each should be included.  *Figure 34. “Create adjusted record PDF” dialogue* Select or deselect all documents simultaneously by checking the box on the left of "Title". You can toggle the automatic document header added to the documents using the checkbox at the bottom of the dialogue. Your personal setup determines how F2 pre-fills this dialogue.
Create F2 Manager PDF	Displays the record as it will appear on F2 Manager on iPad. Requires the F2 Manager add-on module. For further information on this, see Manager.

Menu item	Description
	the Copy record and merge to case participants section.
	Link one record to another via either title or ID. “Copy link to this record” copies a link to the clipboard and can be pasted into another record document. The link will be displayed as the record’s title. “Copy record ID” copies the record ID to the clipboard which can then be pasted into e.g. a record document, a chat or a search field. **NOTE** When clicking a copied link, make sure that only one instance of F2 is running. Otherwise F2 may attempt to open it in the wrong instance. Additionally, the record to which the link refers cannot be in edit mode when the link is used.
	Opens cSearch, an advanced, intelligent search engine for F2. cSearch is an add-on module. Read more about cSearch.

The record ribbon functions

This section describes selected functions of the menu items in the record ribbon.

Delete record

The function of the “Delete record” menu item depends on whether the record has been shared.

A record is defined as shared if the creator has involved another user on it, or if another user has searched for and opened the record.

Involving another user may happen through e.g. a chat, emailing the record, reallocating responsibility or adding a supplementary case manager.

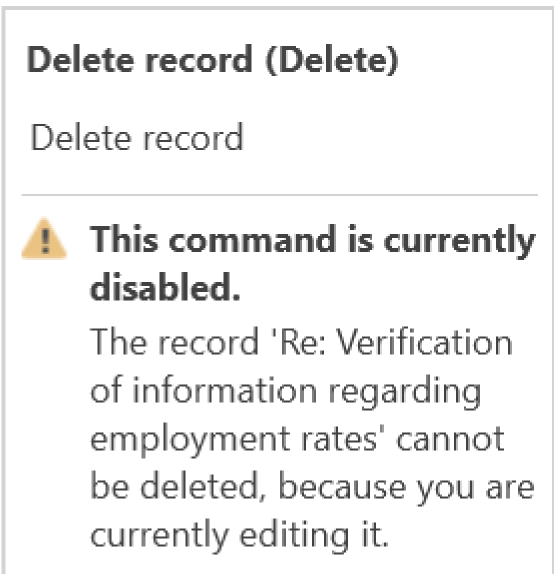
A record with the access level “All” or “Unit” is only counted as shared if it has been opened by a user other than its creator. Once a record has been shared, it cannot be deleted even if the means by which it was shared, e.g. a chat, is deleted.

F2 asks for confirmation before the user deletes a record.

The record cannot be deleted if:

- The user does not have full write access for the record.
- The record is in edit mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
    - The record is attached to a case.
    - The record has been registered.

The tooltip for the “Delete record” menu item will explain why deleting the record is not possible. Hover the cursor over the “Delete record” menu item to view the tooltip.



Deleting unshared records

Unshared records can be deleted from F2.

If the record has not been shared, clicking **Delete record** has the following consequences:

- The record is removed from all lists and personal folders.
- The record is transferred to “My deleted records” from which the user is able to restore it or delete it permanently.

NOTE	When deleting an unshared record, it is removed from all lists, including the “Archive”, and can only be found in “My deleted records”. The record is kept there for 30 days after which the deletion is permanent. The 30-day period can be adjusted to accommodate the needs of the organisation.

Deleting shared records

Only users with the privilege “Can delete shared records for everyone” are able to delete shared records.

If the record has been shared, clicking **Delete record** has the following consequences if the user does _not# have the aforementioned privilege:

- The record is removed from “My inbox”, “My desktop”, “My archive”, “My sent records”, “My chatted records”, and any lists created therefrom.
- The record is transferred to “My deleted records” from which the user is able to find any records that they have deleted.
- The record stays in the “Archive” and may still be found via searches.
- Any other users with whom the record has been shared are still able to see it on their lists.

Delete for everyone

The “Delete for everyone” menu item is used to delete a record even if it has been shared. Only users with the “Can delete records for everyone” privilege have access to “Delete for everyone”. For other users the menu item is invisible.

Figure 36. “Delete for everyone” menu item

“Delete for everyone” is found in the drop-down menu for “Delete record”. Using this, a shared record can be deleted.

The following conditions will block deletion of a record for everyone:

- The user does not have full write access for the record.

- The record is in edit mode.
- There is an unread annotation on the record.
- The record has a record number on a case, i.e.:
  - The record is attached to a case.
  - The record has been registered.

Clicking **Delete for everyone** has the following consequences:

- The record is transferred to “My deleted records” from which the user is able to find any records they have deleted.
- The record is removed from all other lists, including the “Archive”.
- The record may still be found through “Search all over” by users with access to the record before it was deleted.

Deleting a record permanently

A user with the “Can delete records for everyone” privilege can delete shared records permanently. Other users may only permanently delete unshared records.

To permanently delete a record, go to the main window. From here, select the “My deleted records” list.

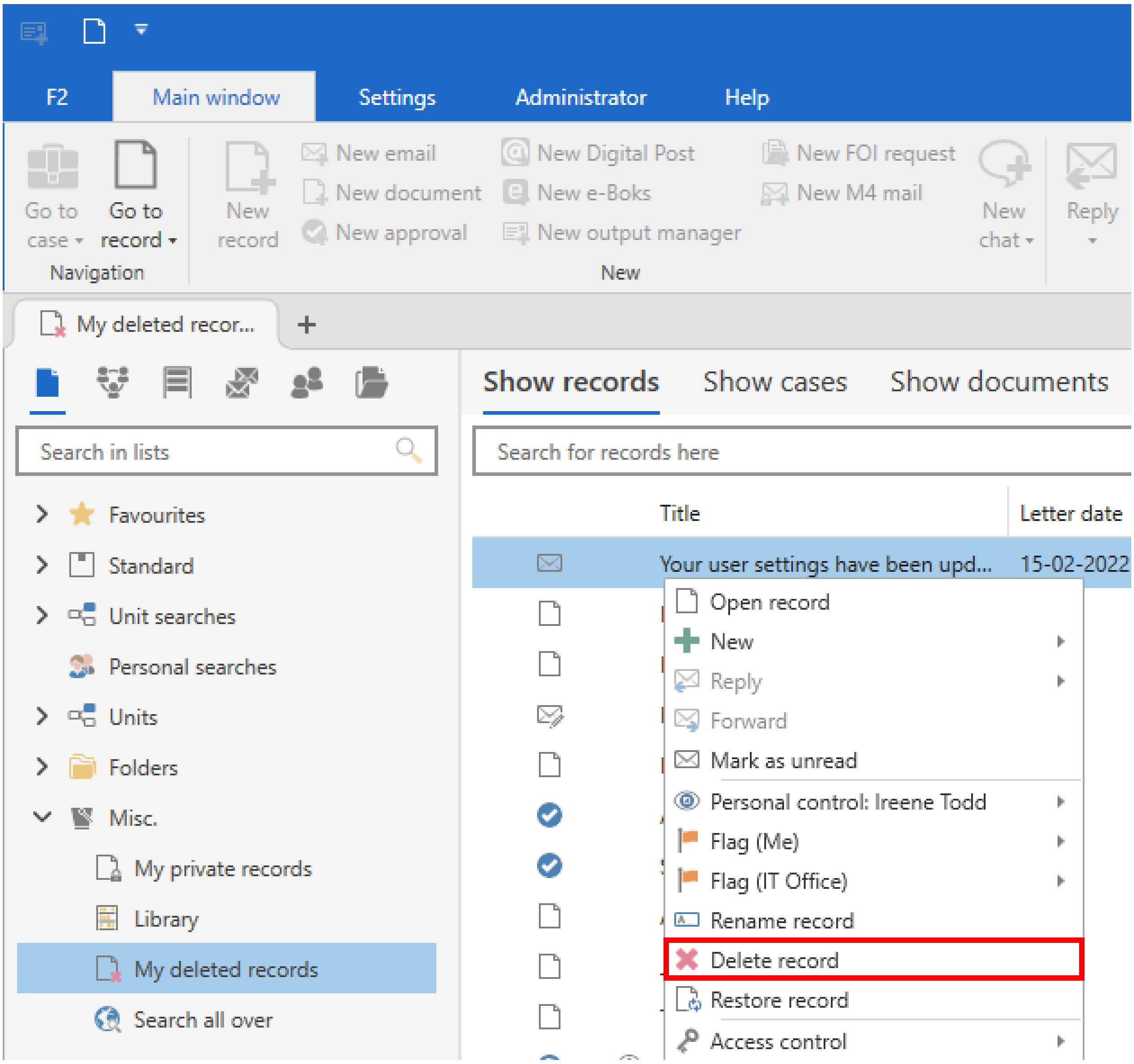


Figure 37. The record context menu in "My deleted records"

Select the record and right-click to open the context menu. Then click **Delete record**. F2 asks for confirmation from the user before a record is permanently deleted.

Copy record and merge to case participants

The following describes the options for copying a record and merging a document template to the case participants.

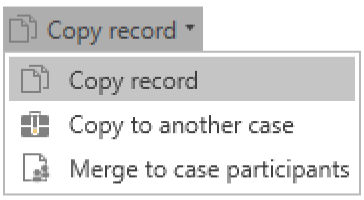


Figure 38. "Copy record" menu item

These functions are found in the drop-down menu of the "Copy record" menu item on the record ribbon.

Copy record

Click **Copy record** to open the “New record” dialogue.

Figure 39. “Copy record”

From this dialogue it is possible to create a copy of the open record.

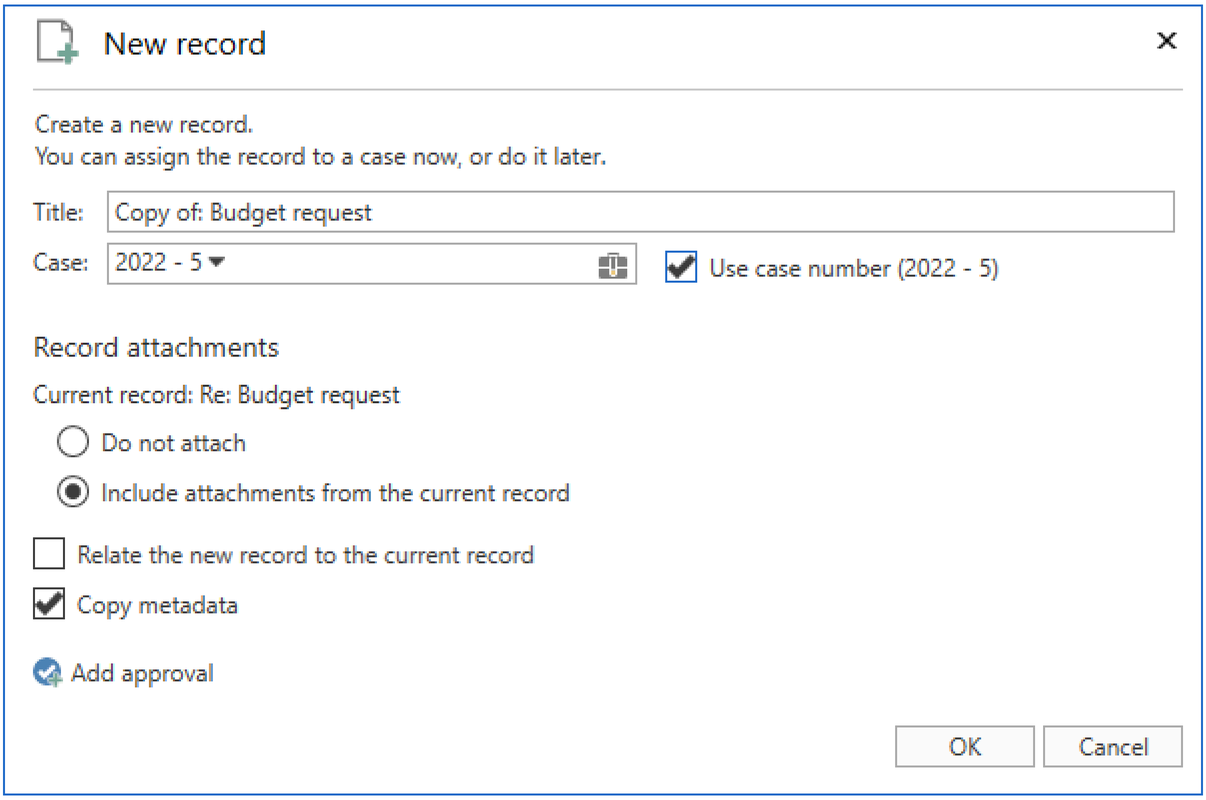


Figure 40. Create new record via “Copy record”

When copying a record, the user must take the following fields into account:

Field	Description
“Title”	Enter the record title here. F2 automatically adds “Copy of [title of original record]” in this field.
“Case”	Add the record to an existing case by entering the case number here, or search for a case by clicking the case icon. **NOTE** Suggestions in the “Case” field can be configured so they are more relevant to the individual user. The configuration is performed in cooperation with cBrain. It is also possible to create a new case for the record. For further information on creating new cases, see the section Adding a record to a new case.
“Use case number”	If the original record is attached to a case, the user can tick this box to add the new record to the same case.
“Record attachments”	Choose whether to copy the attachments from the original record to the new record. By default, the option “Include attachments from the current record” has been selected, which means that all attachments from the original record will be copied to the new record. If the attachments are not needed, use the “Do not attach” option.
“Relate the new record to the current record”	Tick this box to create the record as an answer record to the original one. This relation is shown in the “Related records” menu item on the “Advanced” tab of the record window. For further information on related records, see the section Menu items on the “Advanced” tab.
“Copy metadata”	By default, the “Copy metadata” box is ticked. Since the new record is a copy of the original record, it is often desirable to copy the metadata as well.
“Add approval”	Requires the add-on module F2 Approvals. Displays fields related to approvals, so the record can be created with an approval flow attached. Read more here.

Copy to another case

This function is a quick way of copying a record to another case.

Figure 41. "Copy to another case"

Click **Copy to another case** to copy the record as well as its metadata and attachments to another case. The dialogue below appears. From here a case is selected to which a copy of the record is added.

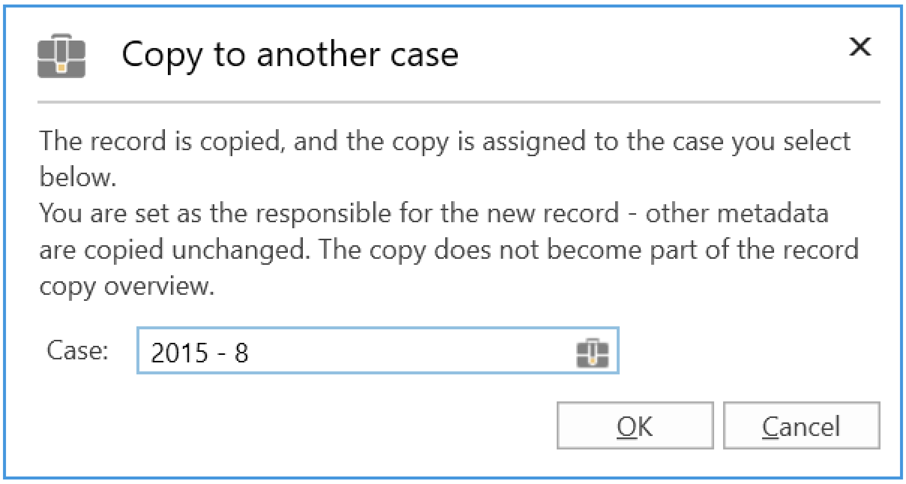


Figure 42. "Copy to another case" dialogue

From this dialogue it is not possible to choose between variations of the record, whether to include metadata, or to create a relation.

Click **OK** to open the new record.

Merge to case participants (add-on module)

"Merge to case participants" is part of the F2 Merge Codes add-on module, and the menu item is available only if the module is installed.

Figure 43. Merge to case participants

This function will add a document from a template to the open record. This template contains one or more merge codes, which may collect information from the participant register, metadata or the phrase archive.

This lets the user merge standard email templates with the participants identified on a given case.

[Read more about merge codes](#).

Menu items on the “Advanced” tab

The record window’s “Advanced” tab contains menu items for working with a record. Whether a menu item is active depends on the user’s role and the record’s status. For example, the active menu items of an email differ from those of a standard record.

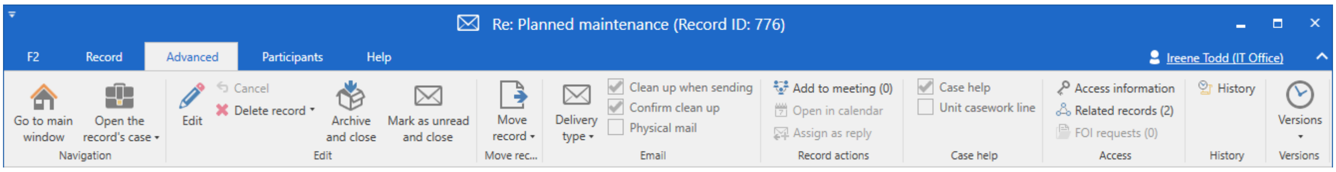
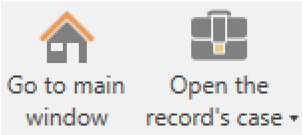
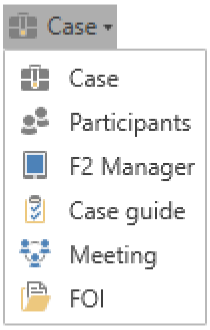
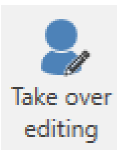


Figure 44. Menu items on the “Advanced” tab

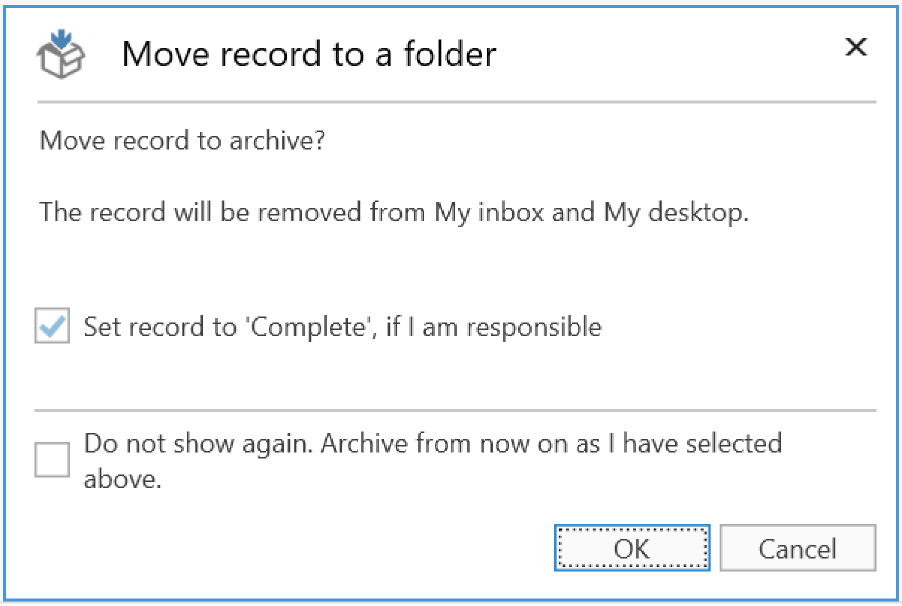
The access level on a record also affect which menu items are active.

You can customise the ribbon in the window "Customise toolbar and ribbon".

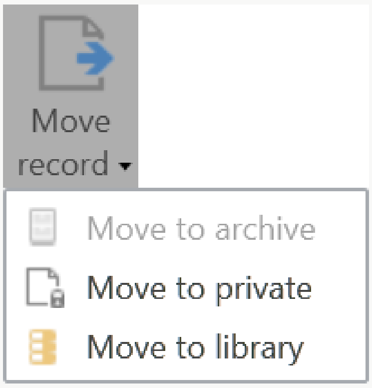
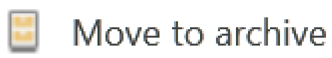
The menu items of the “Advanced” tab are described below.

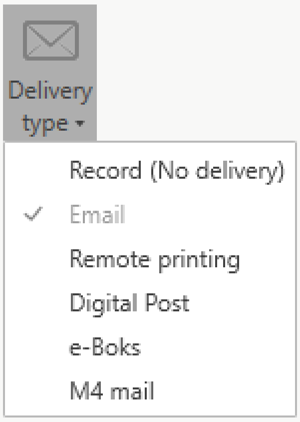
Menu item	Description
	Navigate between the main and case windows by clicking one of them. By clicking the drop-down arrow next to “Case”, it is possible to navigate to the case tabs “Case” and “Participants”. If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under **Case** as shown below.  *Figure 45. Drop-down menu for “Case”* It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode.
	When a record is in read-only mode, click the **Edit** button to make changes to the record document, its attachments, and its metadata fields. When a record is in edit mode, the **Edit** menu item is replaced with the **Save** item. If another user is editing the record, the **Edit** menu item is replaced with the **Take over editing** item.
	You can take over work on a record including its record and approval documents by clicking **Take over editing** in the ribbon. The menu item is shown when another user is editing the record. The other user is notified when you take over the record. Read more about taking over work on a record.
	Save changes to the record document, its attachments or its metadata fields by clicking **Save**. The record cannot be saved if a validation error is found. This error occurs e.g. when an invalid value has been entered into a metadata field. The field will turn red and the **Save** button becomes inactive.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>fields. This does not affect changes made to the record title or any attached documents.</td></tr>
<tr><td>
</td><td>
Depending on whether the record has been shared, Delete record works in two different ways.
When the user deletes a record, F2 asks the user to confirm this action.
Users with the privilege “Can delete shared records for everyone” have the option to Delete for everyone via a drop-down menu.


Figure 46. Drop-down menu for “Delete record”
Read more in the Delete record section.
</td></tr>
<tr><td>
</td><td>
This menu item is visible when a record has been deleted and then opened from the “My deleted records” list.
Before a record is restored, F2 asks the user to confirm this action.
</td></tr>
<tr><td>
</td><td>
This button helps the user “tidy up” the record by removing it from the user’s inbox and desktop.
If the user has the responsibility for the record, the record’s status can be changed from “In progress” to “Completed”.
When the user archives a record, the following dialogue appears.


</td></tr>
</table>

Menu item	Description
	Figure 47. “Move record to a folder” dialogue
	Click on **Mark as unread and close** to close the window and mark the record as unread. You can use the function to keep track of records you need to get back to later. Combine the function with flags and personal searches to maintain an accurate overview of everything you receive and which actions you need to take.
	The “Move record” drop-down menu contains three items: • Move to archive • Move to private • Move to library. These items are described below.
	The menu item “Move to archive” is active for records placed in the “My private records” list. Use it to move a record from here to the shared archive.

Menu item	Description
	A record can only be moved to the “Library” list while its access level is “Involved”. Once moved the access level may be expanded. The “Library” list is an archive shared between all F2 users, so records with access level “All” in the “Library” can be seen by all users in the organisation. After it has been moved to the “Library”, a record can be edited as usual. This includes the record’s access level, attachments and metadata. If a record that is moved to the “Library” was added to a case, a copy will be created and the original record will be removed from the case.
	The “Delivery type” drop-down lets the user choose how to send the record. When the delivery type has been chosen, the relevant metadata fields are added to the record. The menu item’s icon will change to reflect the delivery type. This change also applies to the title bar of the record window: Record (no delivery) Email Remote printing Digital Post e-Boks M4 mail The delivery type may be changed even when the record is not in edit mode. Changing the delivery type happens instantaneously, and it is not necessary to save the record for the change to take effect. **NOTE** The number of delivery types available depends on the add-on modules in your organisation’s F2.

Menu item	Description
	Via “Setup” on the “Settings” tab of the main window, the user can choose that F2 ticks all boxes automatically. Regardless of personal settings, it is possible to decide F2’s actions each time an email is sent.
Add to meeting (0)	Use this menu item to add a record to a specific meeting. The number of meetings to which the record is added is shown in brackets. F2 Meetings is an add-on module that aims to facilitate meetings by assisting the user in preparing an agenda, managing meeting documents and producing minutes.
Open in calendar	This menu item is active if integration with Microsoft Outlook is enabled on the F2 installation and the record contains a compatible calendar invitation. Click **Open in calendar** to open an attached invitation in Outlook.
Assign as reply	This menu item is used to assign a record as a reply to an incoming email. Click **Assign as reply** to open the “Choose record” dialogue in which the email can be selected.
Case help	Tick this box to make the “Case help” dialogue appear when the record is saved. The case help is set up during the initial configuration of F2 and supports users in following the organisation’s established guidelines for working in F2. For further information, see the Case help section.
Unit casework line	When a record is sent to internal users or units, the “Unit casework” line is created for each recipient. The “Unit casework” line appears when the record is sent. For further information, see the section The unit casework line.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td></td><td>
This menu item becomes active when the record is linked to another record. The number in brackets shows the number of related records.

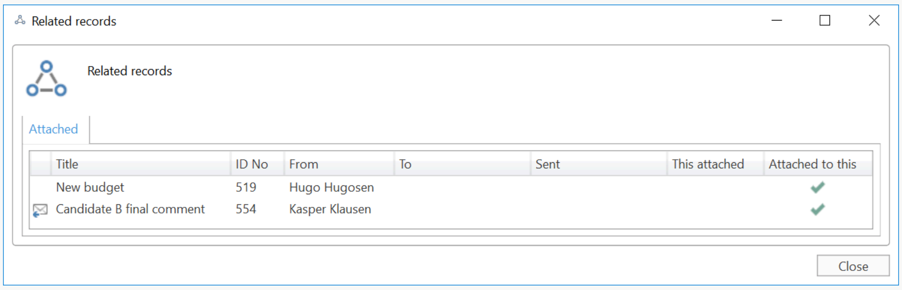


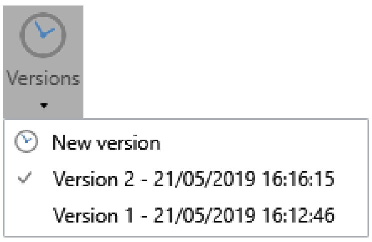
Figure 48. “Related records” dialogue

This dialogue contains information about sender, recipient, and when the email has been sent. The columns at the far right show whether the related record precedes or follows the open record.
</td></tr>
<tr><td>


</td><td>
This menu item is active when the record is part of an FOI request. The number in brackets shows the number of FOI requests in which the record appears.

Clicking **FOI Requests** opens a dialogue with a list of the FOI requests in which the record appears. FOI request is an add-on module. For further information, see FOI Request, Advanced.
</td></tr>
<tr><td>


</td><td>
Opens the “Record history” window which lists all activities registered on the record.

For further information, see the History section.
</td></tr>
<tr><td>


</td><td>
Create a new version of the record and view previous versions.

For further information, see the Versioning section.
</td></tr>
</table>

Functions of the “Advanced” ribbon

This section describes the functions of the menu items on the “Advanced” tab.

Case help

F2’s case help assists users in following the organisation’s rules and guidelines for case processing.

The case help is set up during the initial configuration of F2 and supports users in following the organisation’s established guidelines for working in F2. This means that it may contribute to keeping case work in line with the organisation’s wishes regarding its conduct.

An F2 installation typically comes with case help enabled. Depending on its configuration, it may be optional or mandatory for users to follow the case help’s suggestions.

The case help also facilitates that deliveries to the National Archives or a similar institution are performed with a minimal search for records that are not associated with a case, but should have been. Registering a record is insufficient if it must be delivered to the National Archives; it must also be associated with a case. The case help can be set up to remind users of this.

NOTE	If needed, case help can be disabled for individual users. These users are assigned the privilege “No case help for saving or sending records”. For further information on assigning privileges, see Administrator.

In the case help dialogue “Suggested changes when [action]”, the dialogue title informs the user which action that caused the dialogue to open. The action may be saving, sending, forwarding or replying to a record.

The dialogue text offers more context. Suggested changes are based on one of five categories:

- Save record.
- Save record from external participant.
- Send record internally.
- Send record to own unit.
- Send record externally.

The figure below is an example of F2 supporting the user via case help when saving a record. In this example, management has decided that records must be registered, and that their access level must be “Unit”.

If the sender has not performed these actions already, the case help will open and suggest that the user perform them.

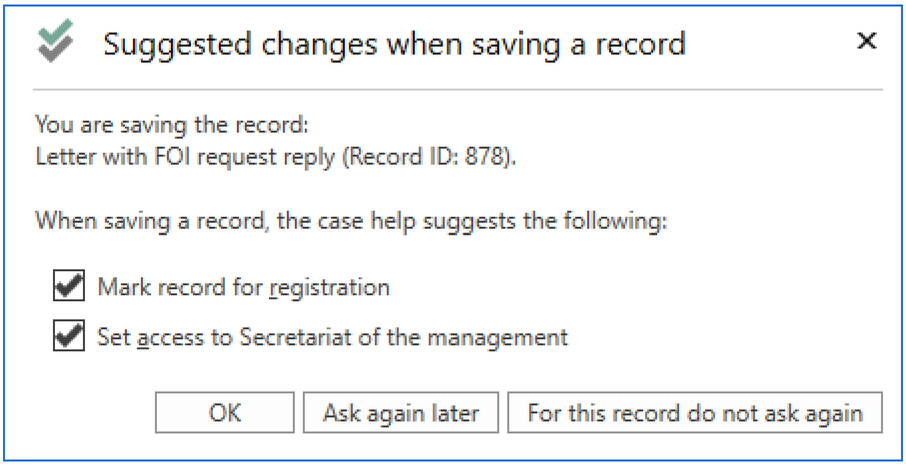


Figure 49. Case help: Suggested changes

When the user has selected the actions to be performed on the record, three options exist:

Function	Description
"OK"	The case help will perform the selected actions on the record.
"Ask again later"	The case help will not perform any actions, but remains active. The dialogue reappears when relevant.
"For this record do not ask again"	The case help will not perform any actions and is deactivated for this record. It may be reactivated via the "Advanced" tab.

NOTE The case help does not suggest retaining the currently selected access level or restricting it.

Case help on answer records

If the organisation has decided that records be created with case help, the following applies:

- Case help is activated for records created as a reply to or a forward of a record with case help activated.
- Case help is activated for records created as a reply to or a forward of a record without case help.
- Case help is activated for records that are replies to other records.

If case help is activated for an incoming email, and the user clicks either **Reply**, **Forward** or **Reply all**, F2 performs the following actions:

- Access level is set to that of the incoming record
- "Case help" is ticked.
- The responsibility is allocated to the user.
- The record is marked as read.
- Flags are removed from "Unit line to case processing"

Access information

Access information shows users with:

- Read access to the record
- Write access to the record's attached documents (including the record document)
- Full write access to the record and attached documents (including the record document).

To access a record, the following conditions must be met:

- The user has read access to the record.
- If the record has an access restriction, the user must be included in at least one of the access groups.

On the "Advanced" tab, click **Access information**. The "Access information" dialogue lists all users with access to the record and their access rights.

Read more about the "Access information" dialogue.

The unit casework line

When a record is sent to one or more users or units using the **Send** function, it is possible to follow the recipients' processing of the record. This is done using the "Unit casework line", which is used in cases of inquiries that require a reply from the recipient, e.g. a record sent to the legal department in connection with a hearing.

To enable this line, go to the "Advanced" tab and tick the field "Unit casework line" before sending the record.

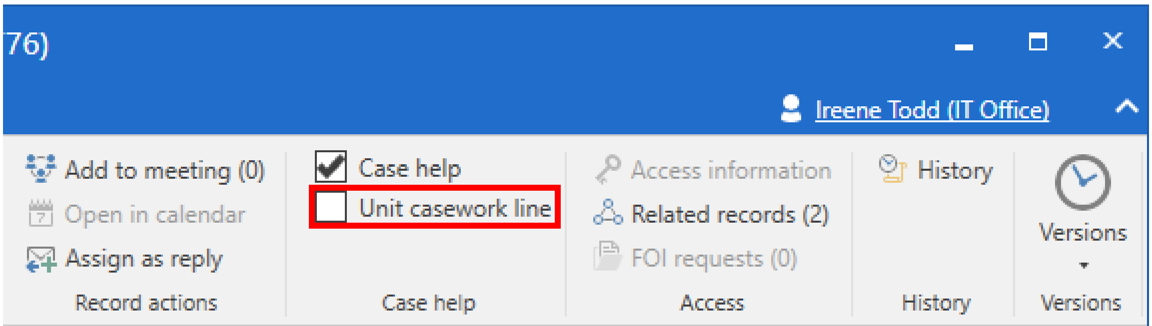


Figure 50. Add "Unit casework" line

This creates a new group of fields on the record, "Unit casework", when it has been sent. A "unit casework" line is added for each recipient when a record is sent to multiple users or units.

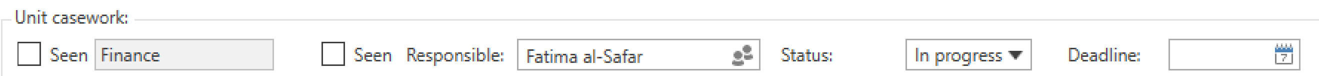


Figure 51. The unit casework line

When the email is received, the recipient user or unit can use the line in their work. A deadline and a responsible user can be assigned using the unit line. The formal responsibility for the record remains with the sender; however, with the “Unit casework” line, the recipient may delegate the responsibility for the record to another user within the same unit.

Information regarding the recipient unit’s management of the record is shared with all users with access to it. This allows the sender to keep track of the recipient’s work and for example see:

- Whether the receiving unit and its responsible user have seen it.
- Whether the responsibility for a record has been delegated to a certain user.
- The status of the record.
- Whether the receiving unit has assigned an internal deadline to the record.

Each field is described in the following sections.

If necessary, recipients of emails without the unit casework line can add the line themselves. This is done by clicking on **Show all fields** in the record window’s ribbon, selecting **Advanced**, and then clicking on the **Unit casework** in the bottom left-hand corner as shown below.

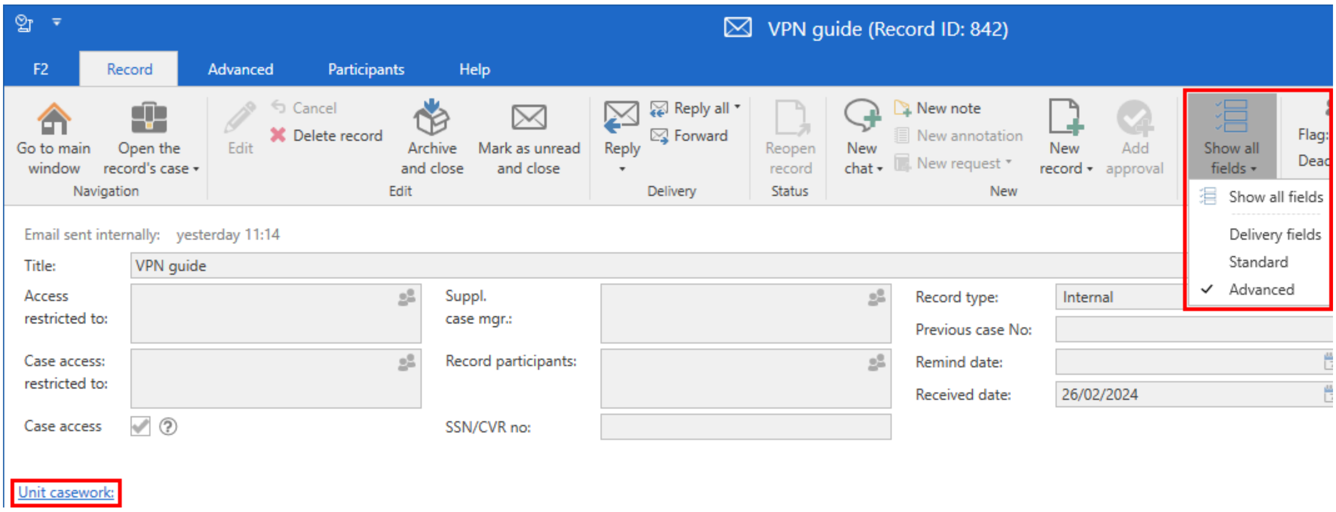


Figure 52. Add the unit casework line on a received email

This adds the unit casework line, as illustrated below.

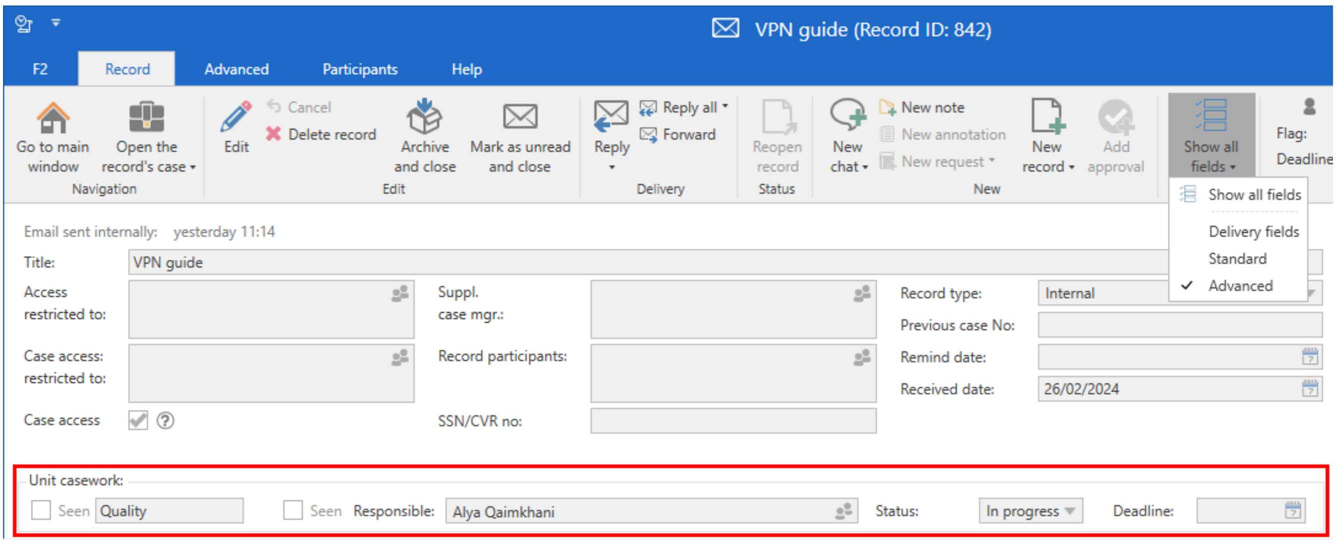


Figure 53. Recipient unit’s casework line

If a user adds the unit casework line on a record received in their inbox, F2 automatically allocates the responsibility for the record to this user. The following section describes the field in further detail.

The unit casework line's "Seen", "Recipient", and "Responsible" fields

"Unit casework" contains two sets of fields indicating who has seen the record: one set for the recipient and one for the user to whom the responsibility has been allocated.

The first "Seen" field, followed by a field with the recipient unit's name, indicates whether a user in that unit has seen the record. The second "Seen" field, which is followed by a "Responsible" field, indicates whether the responsible user has seen the record.

Even though a record has been sent to a specific user in a unit, only the recipient unit is shown until a user has actively seen the record. This is because all users in the unit can see the record and it may be a different user than the intended recipient who processes the record.

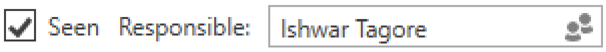


Figure 54. The "Seen" and "Responsible" fields

When a user opens the record and clicks on **Edit,** e.g. to reallocate responsibility or add their own deadline (see below), F2 automatically ticks the "Seen" field and designates that user as "Responsible". If the user reallocates responsibility after this, F2 removes the tick in the relevant "Seen" field.

This allows the sender to monitor on the record when it has been received by the unit and whether it will be processed by the user to whom it was sent or by another user in the unit.

However, the recipient can open the record to view it and untick the "Seen" field in case they cannot process it immediately.

Using the "Responsible" field, the responsibility for the record can be allocated to a user in the unit. It is not possible to allocate the responsibility for the record to a user outside the unit. When a user is specified in the "Responsible" field, the record is placed in the inbox of that user, notifying them of the reallocation of responsibility.

The "Status" field on the unit casework line

The recipient updates the status field to inform the sender whether work on the record is "Completed" or still "In progress". This lets the sender of the record follow its status and its progress.

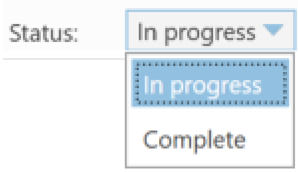


Figure 55. The "Status" field on the unit casework line

The “Deadline” field on the unit casework line

The recipient may add their own deadline to inform the sender when action on the record is expected. This lets the sender keep track of the recipients' internal deadlines for processing the record.

Add a deadline to the record by clicking the calendar icon or by entering the date in the “Deadline” field.

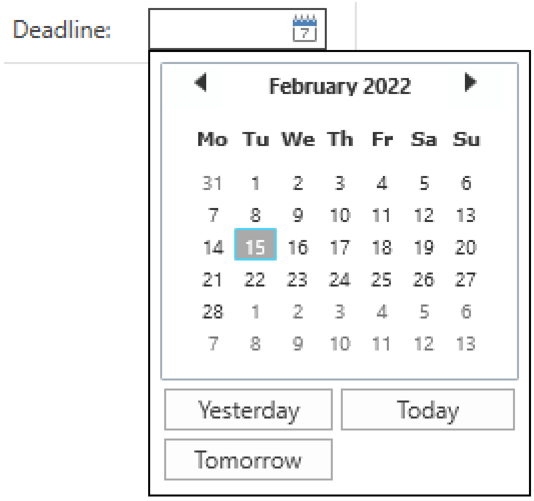


Figure 56. The “Deadline” field on the unit casework line

The deadline may also be set by entering e.g. “+10”, (i.e. 10 days from today), in which case F2 automatically fills in the date when the user leaves the field.

History

When a record is edited, F2 adds a description of the activity to the record history.

Click **History** to open the "Record history" window and see a list of all activity on the record. The record history can be filtered by either record changes, documents, or metadata using the filter fields below the column titles. F2 starts filtering the list when the user enters text or makes a selection from the filter’s drop-down menu.

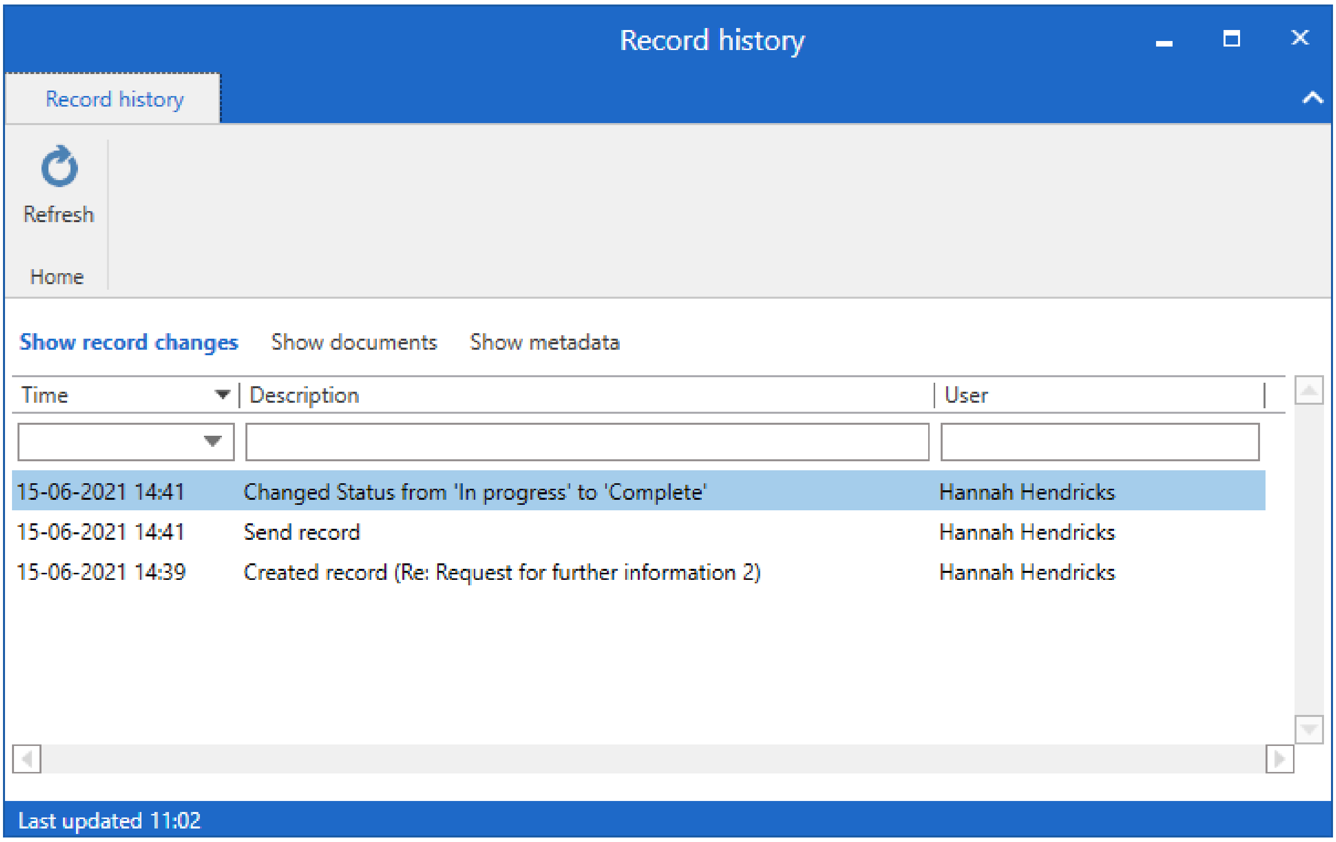


Figure 57. The "Record history" window

The dialogue can be kept open while working in F2. Click **Refresh** to update the list of actions on the record.

The record history is divided into three tabs which are described in the following sections.

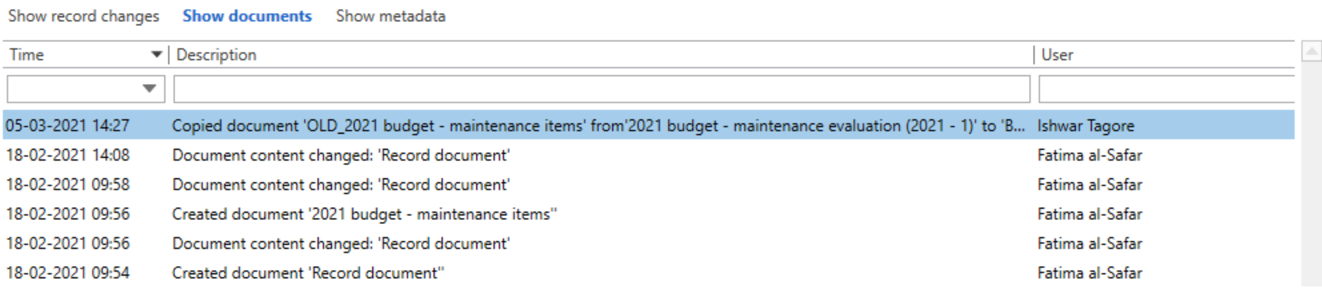
Show record changes

Click **Show Record changes** to display information about changes on the record, including creation time and date and selected metadata.

Figure 58. History: Record changes

Show documents

Click **Show documents** to display information about changes to the record's attached documents, including creation time. The record document is included in this list.

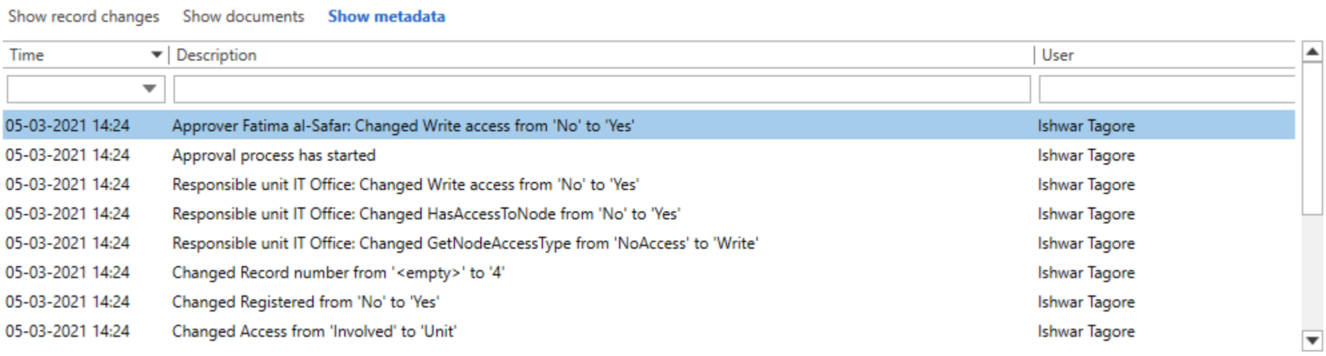


Time	Description	User
05-03-2021 14:27	Copied document 'OLD_2021 budget - maintenance items' from'2021 budget - maintenance evaluation (2021 - 1)' to 'B...	Ishwar Tagore
18-02-2021 14:08	Document content changed: 'Record document'	Fatima al-Safar
18-02-2021 09:58	Document content changed: 'Record document'	Fatima al-Safar
18-02-2021 09:56	Created document '2021 budget - maintenance items''	Fatima al-Safar
18-02-2021 09:56	Document content changed: 'Record document'	Fatima al-Safar
18-02-2021 09:54	Created document 'Record document''	Fatima al-Safar

Figure 59. History: Record documents

Show metadata

Click **Show metadata** to display information about changes to the record’s metadata, including notes, approvals, and requests.



Time	Description	User
05-03-2021 14:24	Approver Fatima al-Safar: Changed Write access from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Approval process has started	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed Write access from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed HasAccessToNode from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Responsible unit IT Office: Changed GetNodeAccessType from 'NoAccess' to 'Write'	Ishwar Tagore
05-03-2021 14:24	Changed Record number from '<empty>' to '4'	Ishwar Tagore
05-03-2021 14:24	Changed Registered from 'No' to 'Yes'	Ishwar Tagore
05-03-2021 14:24	Changed Access from 'Involved' to 'Unit'	Ishwar Tagore

Figure 60. History: Record metadata

Versioning

Versioning of records is managed by F2. A record and its attachments only appear once in F2. When a new version of a record is made, all users will see the newest version only.

It is possible to check the record’s version number and each version’s creation date and, if the user has at least write access to the record’s documents, make an earlier version active again. F2 retains all previous versions of the record, and they can be accessed from the record window.

Versioning is described in further detail below.

Creating a new version of a record

To create a new version of a record, go to the “Advanced” tab, open “Versions” drop-down menu, and click **New version**.

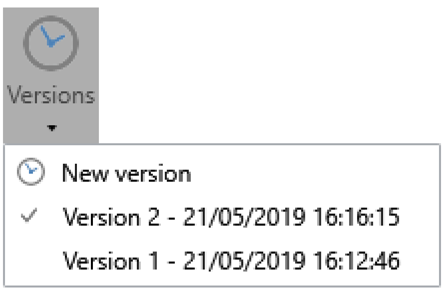


Figure 61. New version

Sometimes F2 creates a new record version automatically. This happens when the case number on the record is changed, i.e. when a record is moved from one case to another. The new record version is created before any other changes are saved.

In certain instances, F2 suggests creating a new record version. This happens e.g. when a user saves a record's attachments who were previously edited by someone else. A dialogue is shown from which the user may choose to let F2 create a new version.

NOTE If a user makes several successive document changes, F2 only asks to create a new version once.

Previous versions

A list of previous record versions can be found on the record window's "Advanced" tab. Click the drop-down arrow on the menu item "Versions". Each version is assigned a number, with the highest being the most recent version of the record.

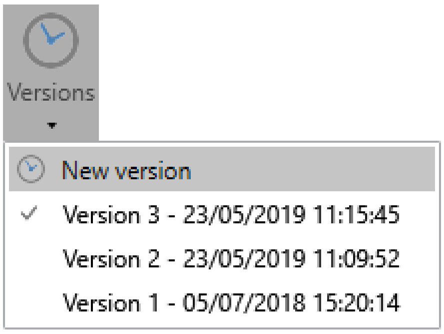


Figure 62. Select previous version

By default, users are shown the most recent version of the record. To see a previous version, click on it in the list. For further information, see Versions and access.

F2 will then open the previous version of the record, and a purple bar above the record metadata shows that it is version x of y.

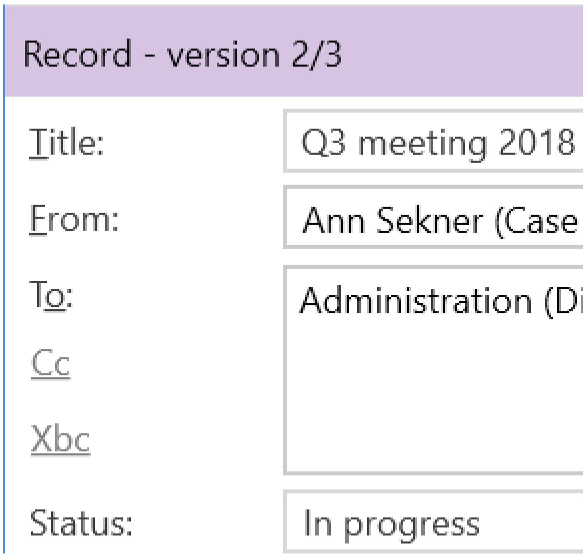


Figure 63. Version 2 of 3

This means that a user can always access previous versions of a record and its attachments in F2 regardless of any changes and edits. Note that old versions of chats, notes, and requests are not retained. These can only be seen on the active version.

NOTE The record must be in read-only mode for the "Versions" drop-down menu to be active.

A previous version of the record cannot be edited, but the user may make a copy of the record in the desired version and continue working with this version in a new record.

A previous version of the record can be set as the active version.

When a previous version of the record has been selected in read-only mode, click **Make version X the active version**.

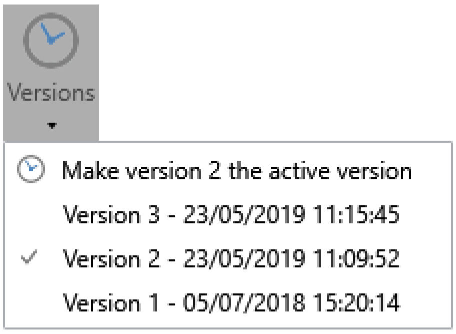


Figure 64. Make current version the active version

When you click on **Make version X the active version**, F2 creates a new version of the record based on the currently selected older version. In the example on the figure above, version 2 would be the basis for a newly created version 4.

This means that attachments added in later versions are removed and changes to the record document or metadata are reverted to their state in the previous version. However, old versions of chats, notes, and requests are not saved. This means the newest versions of these elements will be copied to the newly created record version.

NOTE Only the active version of a record can be edited.

Versions and access

The "Access" value on the newest version of a record determines whether it is accessible to a user.

The record's access level is retained when a new version is created. For example:

Three versions of a record exist. All have the same case manager and responsible unit, but version 1's access level is "Involved", version 2's is "Unit", and version 3's is "All".

Because the newest version of the record has the access level "All", all users have at least read access to version 3. The responsible case manager and other involved users can access all three versions (by accessing them from the "Versions" menu item). Users in the responsible unit can only access versions 2 and 3, while users outside of the responsible unit can only access version 3.

A similar principle applies to the "Suppl. case mgr." field. A supplementary case manager with full write access cannot accidentally restrict their own access rights. If the supplementary manager reverts the record to a previous version to which they previously only had read access, they keep their full write access from the current record version.

Access restrictions on a record also affect uses' access to a given record version. For example:

Two versions of a record exist, both with the same responsible user and access level “All”. In version 1 the responsible user’s unit is added to the “Access restricted to” field. This means that users outside of this unit are only able to access version 2.

Menu items of the “Participants” tab

The “Participants” tab shows a list of participants involved on the record.

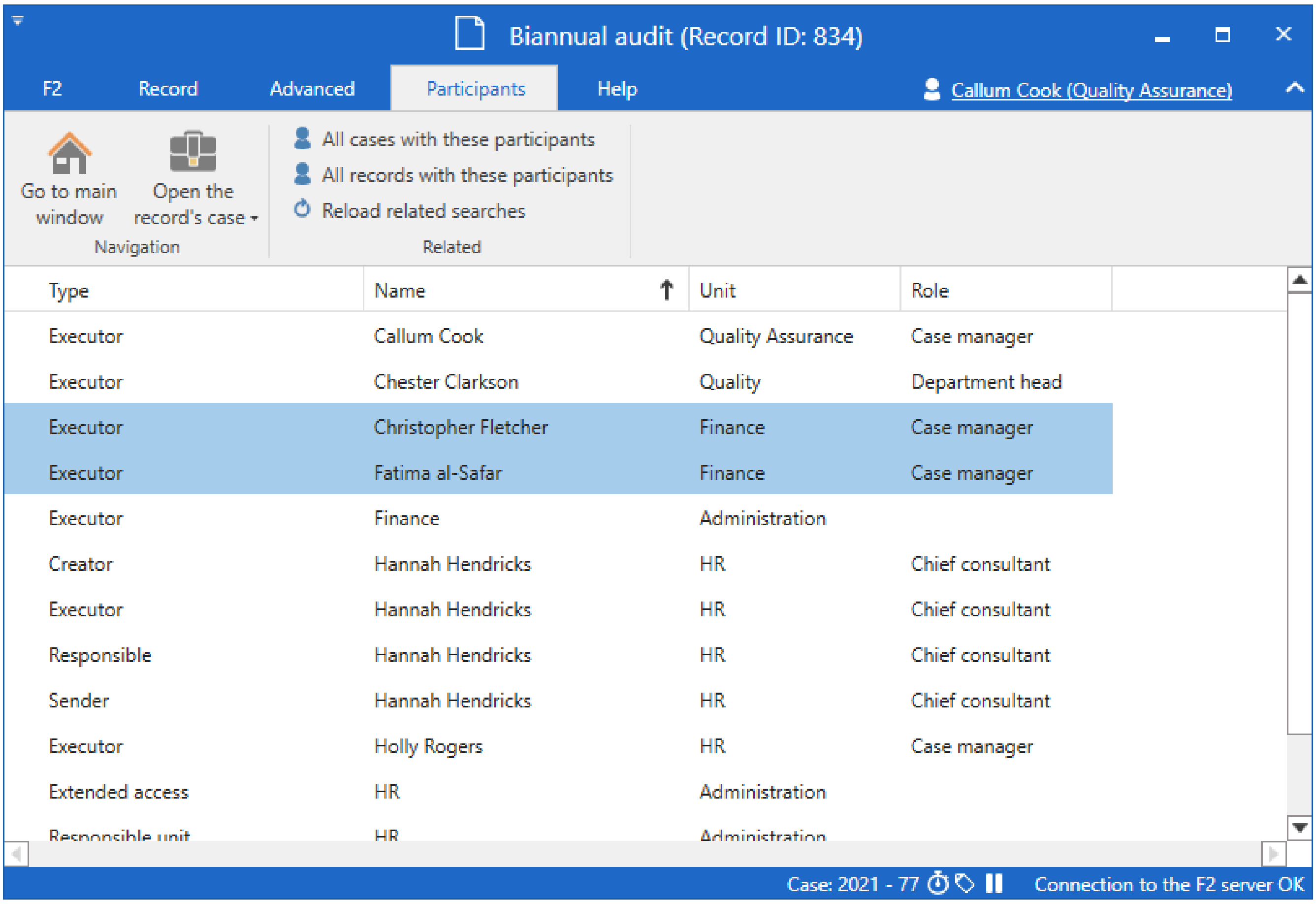


Figure 65. The “Participants” tab in the record window

NOTE F2’s participant register can also be accessed by clicking the participant icon above the search lists to the left of the main window or by using the keyboard shortcut Ctrl+K. For further information, see Searches.

It is possible to edit the list view. Right-click a column in the list, then click **Columns** in the context menu.

The “Select columns” dialogue opens. From here, it is possible to add or remove columns.

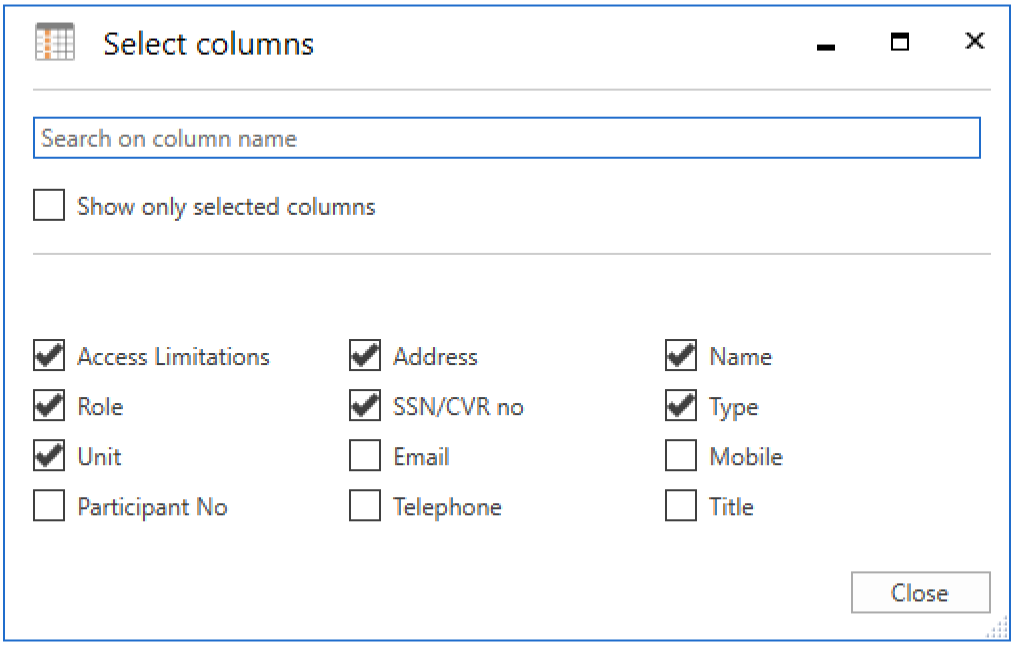


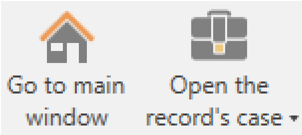
Figure 66. Select columns on the “Participants” tab

Right-click a participant in the list to perform a related search and view which participants are involved on which records and cases. For further information, see Searches.

Menu items for working with the record participants can be found on the “Participants” ribbon.

You can customise the ribbon in the window "Customise toolbar and ribbon".

These menu items are described below.

<table>
<tr><th>Menu item</th><th>Description</th></tr>
<tr><td>
</td><td>Navigate between the main and case windows by clicking one of them.

By clicking the drop-down arrow next to “Case”, it is possible to navigate to the case tabs “Case” and “Participants”. If add-on modules have been added to the case, such as F2 Manager, their corresponding tabs are also shown under Case as shown below.

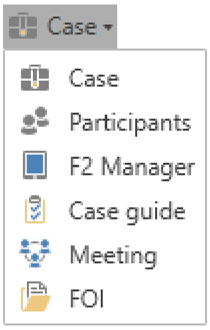
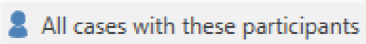
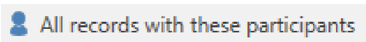


Figure 67. Drop-down menu for “Case”

It is possible to navigate to the case and participant windows from the record window even when the record is in read-only mode.

The “Record” menu item is only active in the main or case window.</td></tr>
<tr><td>
</td><td>This menu item is active when the user selects a participant from the list.

Clicking All cases with these participants opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.</td></tr>
<tr><td>
</td><td>This menu item is active when the user selects a participant from the list.

Clicking All records with these participants opens a new search tab in the main window showing all cases in which the selected participant or participants is/are involved.</td></tr>
</table>

Menu item	Description
	applied upon the next F2 startup. Read more about related searches.

Record and approval document recovery

If F2 detects any unsaved changes on startup, you will have the option of recovering them. There may be unsaved changes if F2 shut down unexpectedly. F2 also displays the changes resulting from the recovery via a direct comparison between the existing and restored record or approval document.

When you restart F2, the "Document recovery" dialogue opens. Here it is possible to save the restored changes to a new record.

The dialogue will not open if the changes to the record or approval document were made by you, but on another computer. More information about this situation can be found here.

Automatic recovery on startup

If F2 closed unexpectedly while you were working on a record, you will be automatically offered to recover its record and approval documents on the next startup.

When you start F2 after the unexpected shutdown, the "Document recovery" dialogue opens. The dialogue shows any record and approval documents that you were working on and did not have time to save.

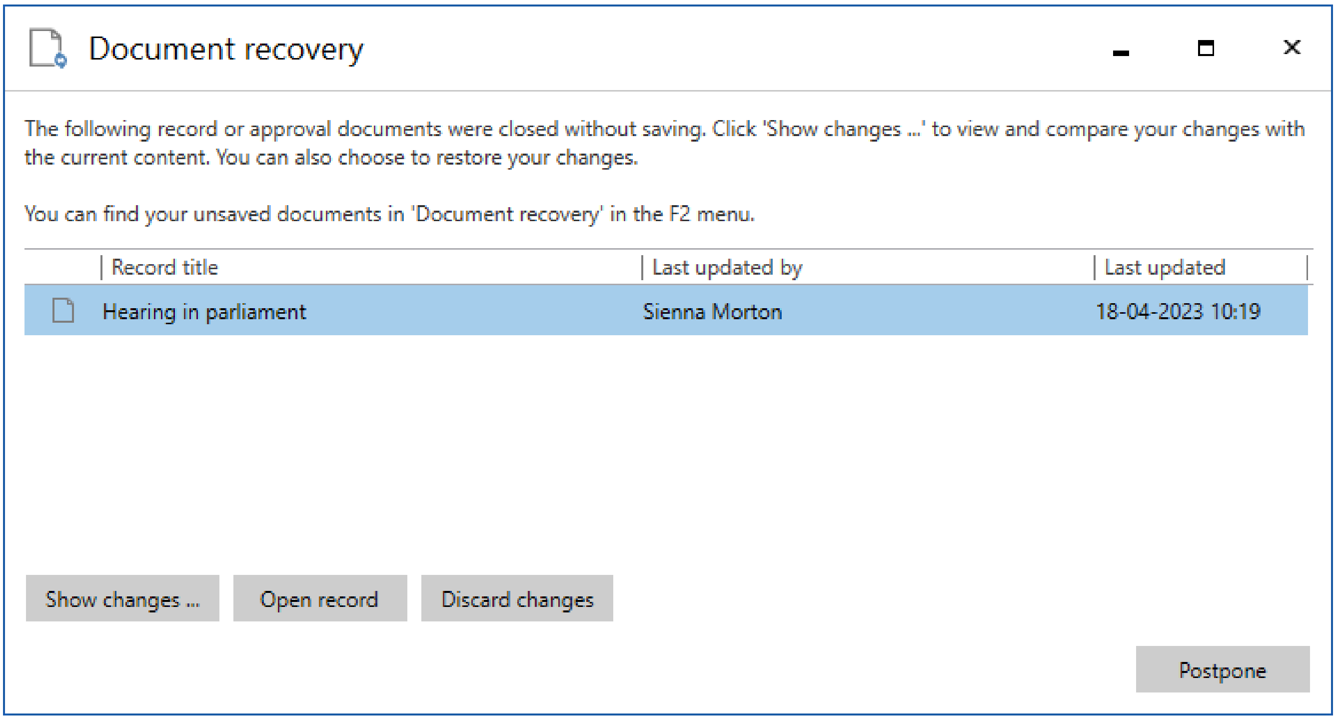


Figure 68. The "Document recovery" dialogue

NOTE	If you were also working on any attachments when F2 closed unexpectedly, they and their records will open in the foreground and potentially hide the "Document recovery" dialogue.

You can handle each record and approval document recovery individually from the dialogue. Select a document and click either **Show changes ...** or **Discard changes**. To open one of the records, double-click it or select it and click **Open record**. You can also postpone your decision for the displayed record and approval documents by clicking **Postpone**.

When you click **Show changes ...**, F2 opens the dialogue "The record/approval document has unsaved changes" for the selected record or approval document.

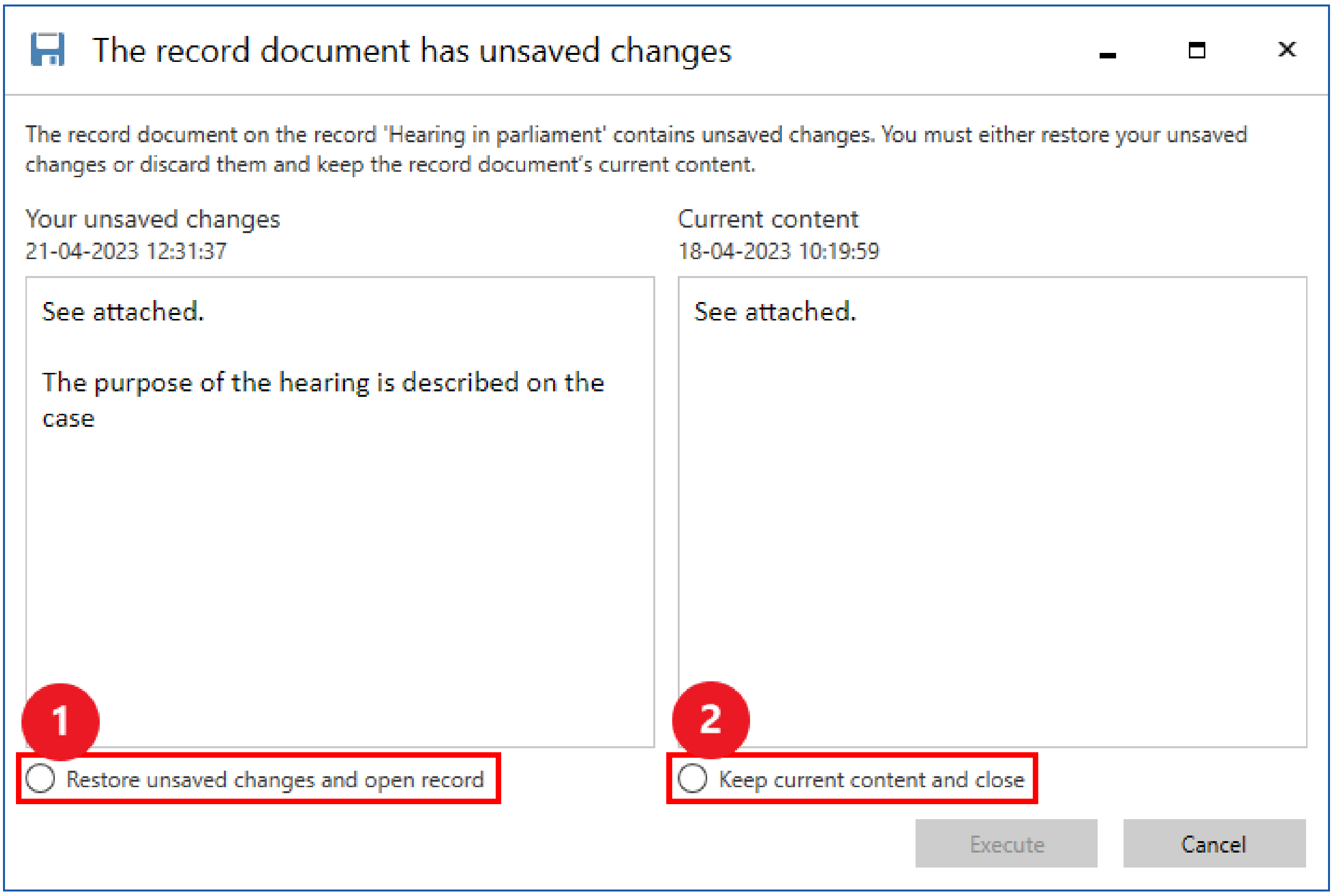


Figure 69. Compare the recovered and active versions of the record document

You can preview the recovered version of the document on the left. Select **Restore unsaved changes and open record** (1) if you wish to save this version of the record document. On the right is a preview of the record version last saved in F2. Select **Keep current content and close** (2) to discard your recovered changes and retain the current version. Click **Execute** when you have made your choice to either restore or discard your changes.

You can click **Cancel** - located at the bottom right - at any time to close the dialogue and return to the overview in the "Document recovery" dialogue.

Manual recovery

You can handle postponed recoveries of record and approval documents at any time. To do this, open the "Document recovery" dialogue from the "F2" tab in the main, record, or case window.

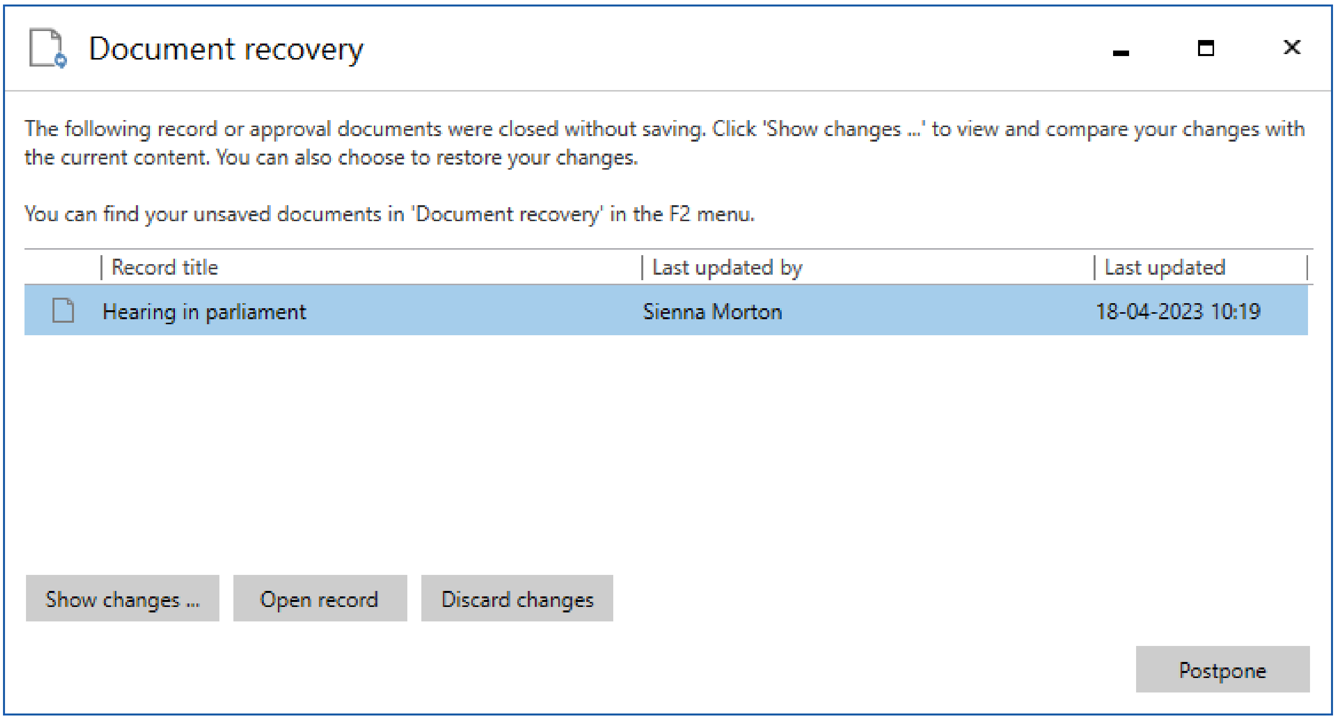


Figure 70. The "Document recovery" dialogue

From here you have the same actions available as in described in Automatic recovery on startup.

You will also be asked to handle any recovered changes to a record when you open it. The record window opens in an empty state, and the dialogue "The record/approval document has unsaved changes" opens in the foreground. From here, you have the same processing options as described in Automatic recovery on startup. Once you have saved or discarded the recovered changes, the selected content is loaded into the record window, and you can continue working on the record.

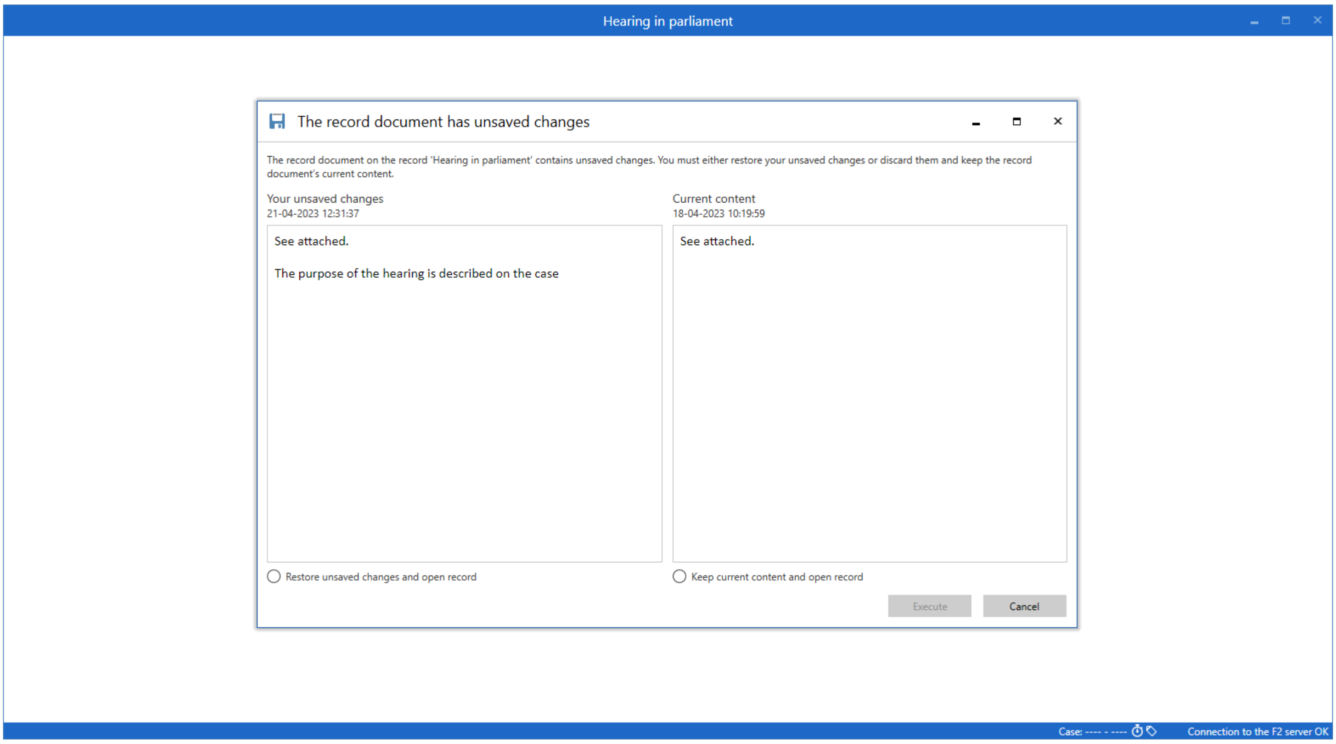


Figure 71. The record window overlaid with the dialogue "The record document has unsaved changes"

Another user has edited the record document

Other users may edit a record or approval document before you have time to recover it. In this instance F2 cannot determine which version to save. You must therefore handle the situation manually.

When you open the "Document recovery" dialogue from the "F2" tab, you can see who last edited the document and when in the columns "Last updated by" and "Last updated". This tells you whether other users have edited and saved the record or approval document you want to recover.

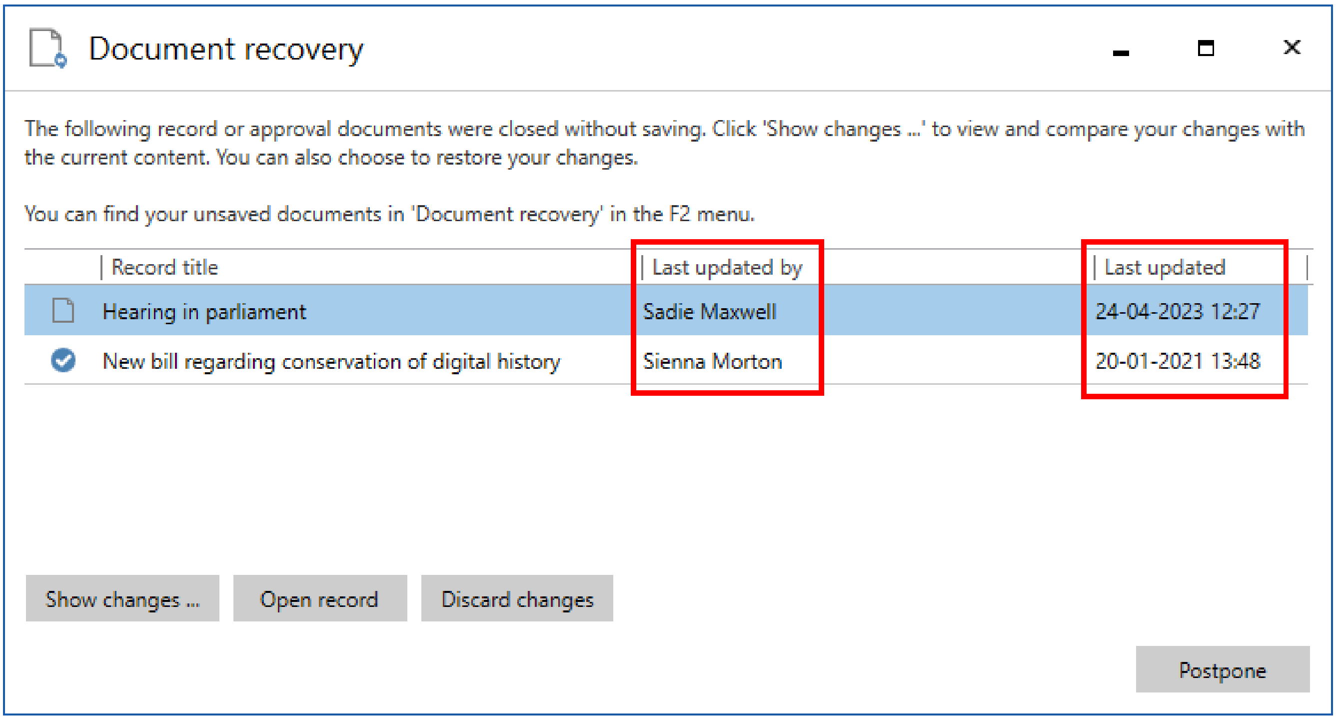


Figure 72. The columns "Last updated by" and "Last updated" in the "Document recovery" dialogue

Handle conflicts by selecting a record or approval document in the overview and clicking **Show changes ...**. The dialogue "The record/approval document has unsaved changes" opens with the two versions of the document contents as well as options for handling them.

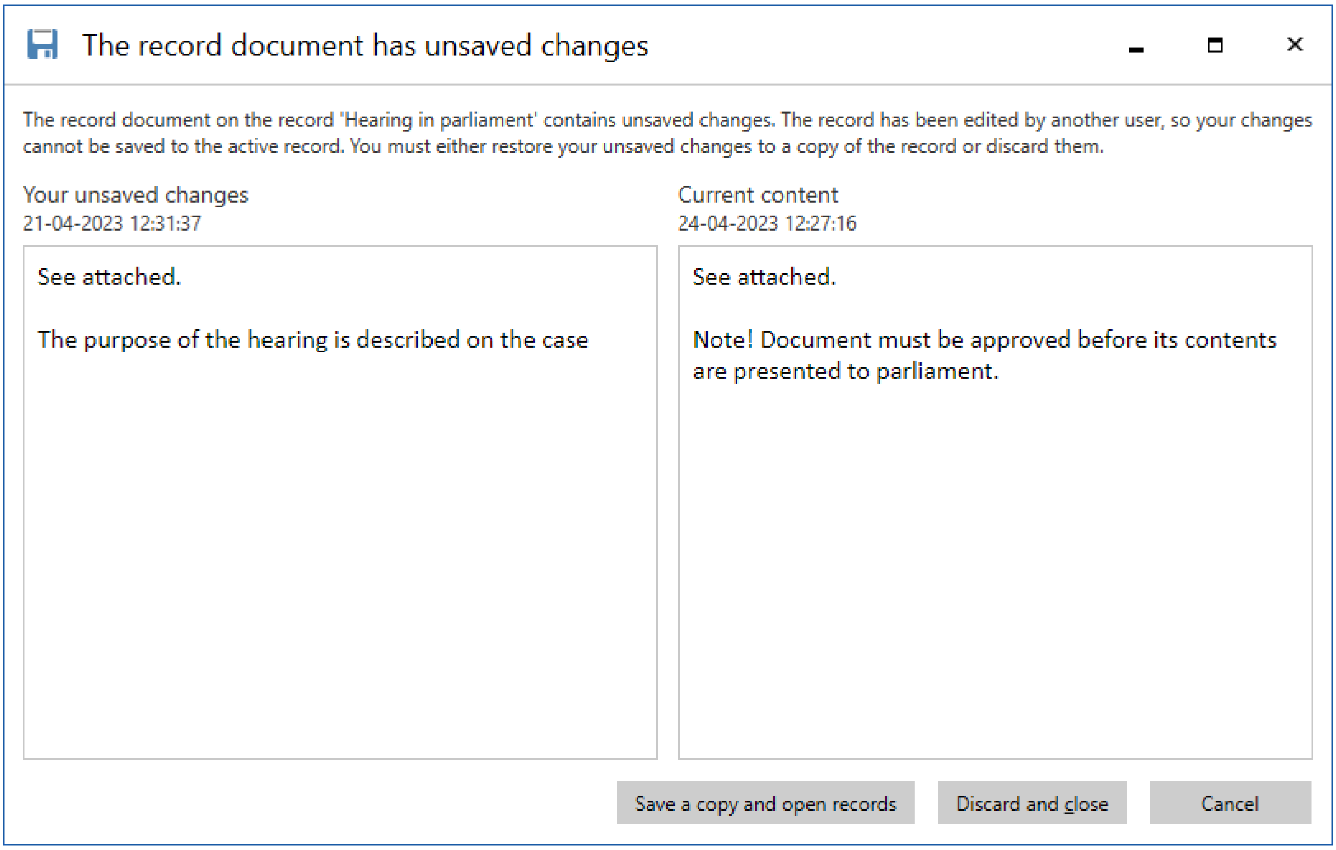


Figure 73. The dialogue "The record document has unsaved changes"

In the dialogue, you can preview your own recovered changes (left) and the other user's saved changes (right). You can choose to discard your changes by clicking **Discard and close**, or you can save the changes in a copy to a new record by clicking **Save copy and open records**. If you choose to save a copy, the record with the copy subsequently opens.

NOTE	F2 only copies the record or approval document. Attached documents and metadata such as access level and case association are not copied.

You can click **Cancel** at the bottom right to close the dialogue and return to the overview in "Document recovery".

Continue your work from a different computer

F2 will notify you if you are about to overwrite your own changes to record and approval documents. This can happen if you work on the same record from two different computers, as in the example below.

Example: Albert edits a record document on a computer at work but forgets to save it. Later, he opens the same record from another computer at his home office and switches to edit mode. F2 then offers to recover the unsaved changes that Albert previously made to the record document. This allows him to continue working on the record on his home computer and save his changes. When he returns to his work computer and tries to save the record document, F2 opens the dialogue "You have already saved this record document" and asks if he wants to overwrite the new version. Since this is the version Albert saved on his home computer, he clicks **No** in the dialogue to retain the new version of the record document. If Albert instead wanted to discard the changes he made on his home computer, he could click **Yes** in the dialogue.

Records configuration options

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

- The option of marking records in connection with customer-specific integrations. Requires F2 External Access (add-on module).
- The option of adjusting the time period in which a record is kept in "My deleted records" before final deletion.
- The option of enabling better suggestions for the "Case" and "Record participants" fields in the record window.
- The option of adding spell check for multiple languages in the record and approval documents as well as the dialogues for reminders and system messages.
- The option of adding words to the spell check dictionary.

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