Searches

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Searches in F2

Our Quick Guide can help you tell apart F2’s different search functions.

F2 offers multiple options when it comes to search. You can perform free-text and advanced searches, and you can use the cSearch module.

In F2 all users work in one shared archive. All emails to and from users, documents from the shared drives of the organisation, from users' PCs, etc. are collected here. This means that all information in F2 exists in one place only – in the aptly named “Archive”. F2 uses the “Archive” as a starting point when performing a search.

Lists and folders in F2 are all part of the “Archive”. You can search in any of the lists or folders displayed to the left in the main window. Simply click the desired list and perform a search.

Search options

The free-text search is the simplest way to search. Free-text searches use free text, which you can combine with search operators. You should only use free-text searching in lists with limited amounts of data.

Advanced search: Use operators and search for specific metadata using advanced search to refine your searches. You can save an advanced search. Saved searches are dynamic, which means it will always be up to date with all records and cases matching your search.

Search for participants: You can search for internal and external participants in the participant register. Use related searches to keep track of which records and cases a given participant is involved with.

View your results: Searches will only yield results from the list you search within. F2 can display your results as records, cases, documents, and requests.

Sort your results: You can customise what information you see about your search results. To do this, adjust, add, and remove columns in the result list. This allows you to sort the result list to fit your exact needs.

TIP

Efficient searches start with clear labeling of records and cases. To make it easier for you and your colleagues to find your work, follow your organisation’s guidelines for everything from record metadata to naming of cases.

Free-text search

Free-text search is the simplest search in F2. Free-text searches are based on free text, which you can combine with search operators and filters. The free-text search field is located above the result list in the main window of F2.

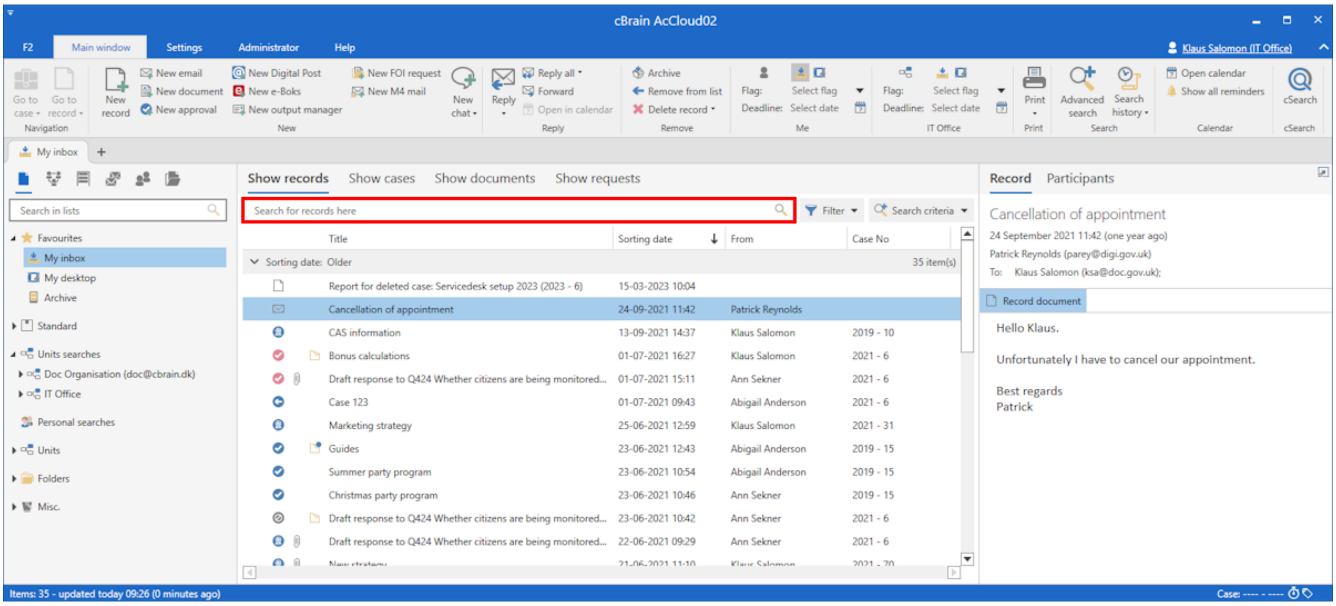


Figure 1. The free-text search field in the main window

Free-text searches are based on a selection of the content and metadata of both records and cases. They should be performed in lists with relatively limited data. If you need to search through larger amounts of data or for specific metadata, you should perform an advanced search.

How to free-text search

Searches are always performed within a given list. This is how to search in a given list:

1. Click on the **list** you want to search. Lists are located in the left side of the main window.
2. Enter a search string in the free-text search field, then click on the **magnifying glass** (search) or press **Enter**.

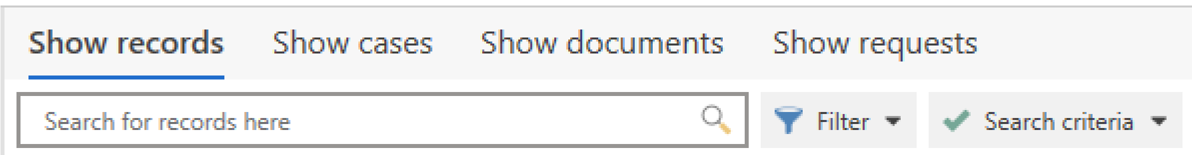


Figure 2. The free-text search field

F2 does not distinguish between lowercase and uppercase letters.

If you have selected "Archive", the search will be performed in the entire archive. If another list is chosen, such as "My inbox" or "My archive", the search will only be performed in that particular list.

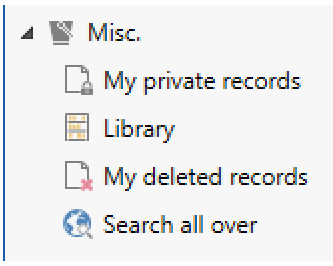


Figure 3. The "Search all over" list is placed in the Misc. node

Read more about the lists and their contents.

When performing a search using the free-text search field in the main or case window, three dots appear in the bottom right corner indicating that the search is in progress.

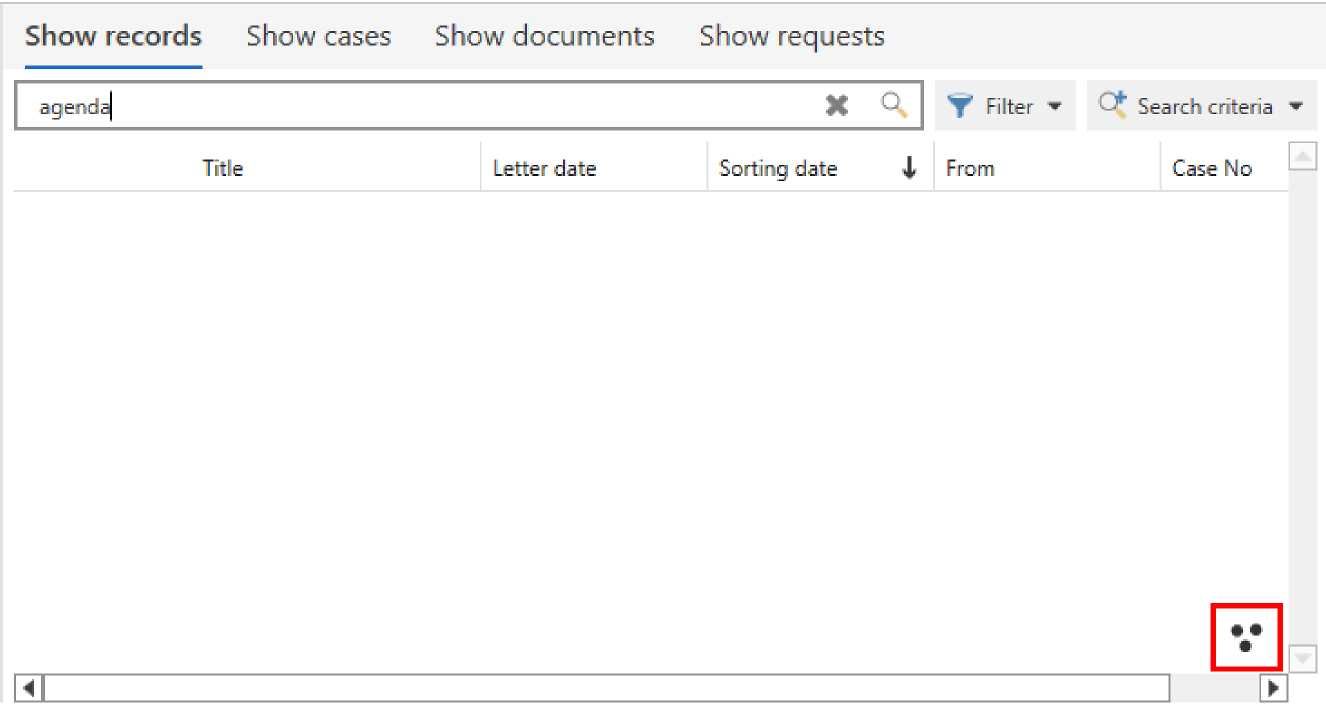


Figure 4. Ongoing search indicator

When a search is performed in the main window, the loading of records on the list is staggered. This means the first search results are available quickly so you can begin your work, while the remaining results load in the background.

The number of records that are loaded can be adjusted in cooperation with cBrain.

Scope of the free-text search

By default, a simple search includes all records in the list to which you have access. The searchable text consists of:

Type	Description
Documents, including record documents	• Content • Title • External ID
Participants	• Email address • Name • Unit • Role
Annotations	• Annotation text
The record metadata	• Record ID • Title • Keywords • Searchable extended data (requires a special setup)
The case the record is attached to	• Title • Keywords • Progress code • Searchable extended data (requires a special setup)
Chats and notes on the record where the user is a participant	• Text • Title

Adjust your search

Use the buttons to the right of the free-text search field, **Filter** and **Search criteria**, to further customise your search.

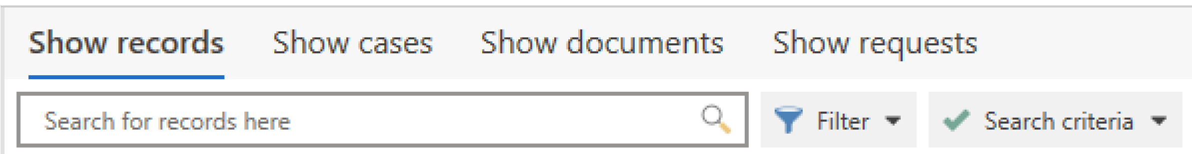


Figure 5. The free-text search field

Searches performed with the free-text search field search for complete words by default. For example, if you enter the word day in the free-text search field and press **Enter** or click the

magnifying glass, F2 automatically adds a space after the word. This means that F2 searches for results that contain exactly the word you entered, but not variations like "days" or "daytime". If you enter multiple words, e.g. department head, F2 will search for both words and include results in which both words appear. You can determine how F2 interprets single words and word combinations by using search operators such as asterisks * and parentheses ().

Filter search results

You can use the free-text search field to filter your search results. This may be useful for narrowing down a search with many results.

To filter your search, start typing in the free-text search field. F2 then starts showing results in which your text string appears. Filtering does not start a new search, but filters an existing one. This means that filtering can also be used in saved lists that contain a large volume of records or cases.

F2 performs a fresh search with the chosen criteria when you press **Enter** or click on the **magnifying glass icon**.

The "Filter" button

The **Filter** button is located on the right side of the main window's free-text search field.

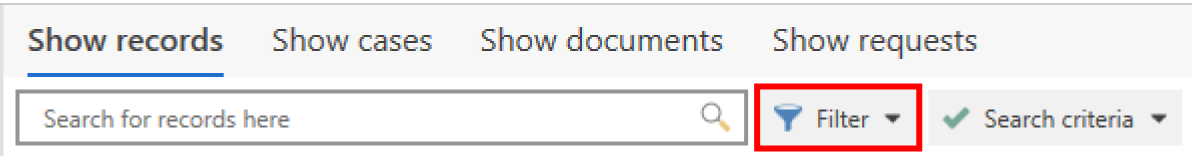


Figure 6. The "Filter" button in the main window

The additional filters available in the result list are "Unread", "With chats", "With documents", and "With flags" as shown below. The filters can only be used when the result list shows records.

Click **Filter** to view the filter options in a drop-down menu. Click a filter to activate it, and click again to deactivate it. Multiple filters can be active simultaneously, and active filters are marked with a green checkmark.

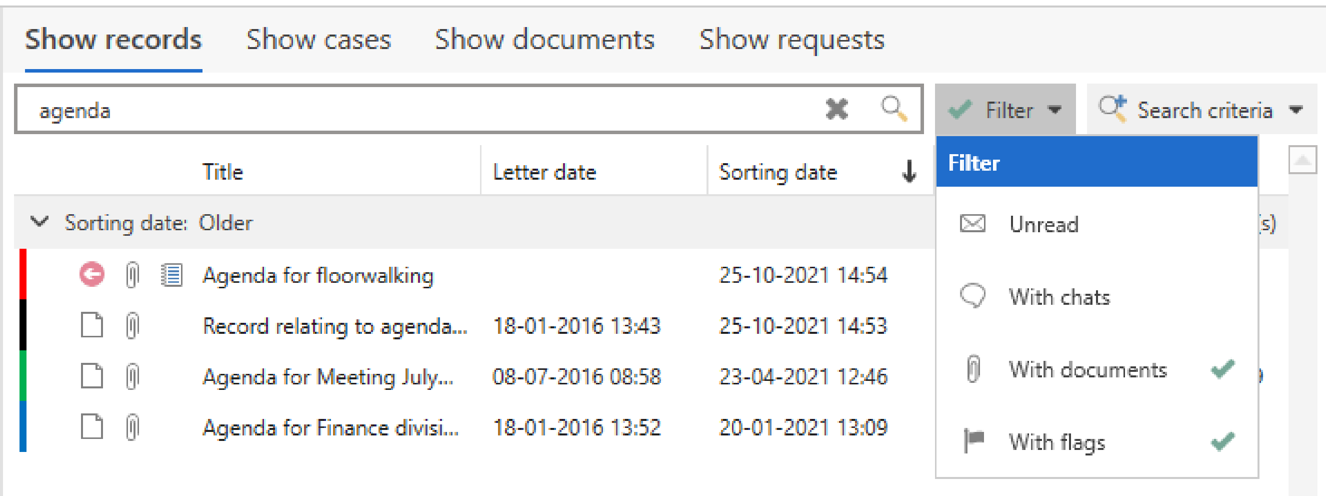


Figure 7. Filter options in the result list

The table below describes each search filter option.

Filter	Description
Unread	Shows unread search results.
With chats	Shows records with chats.
With documents	Shows search results with documents attached.
With flags	Shows search results marked with a flag.

The filters are also available when viewing the result list as cases. These filters are used for filtering the record list below the result list and include the “Match” filter. Read more about this filter in the Show cases section.

The “Search criteria” button

The **Search criteria** button is located on the right side of the main window free-text search field, next to the **Filter** button.

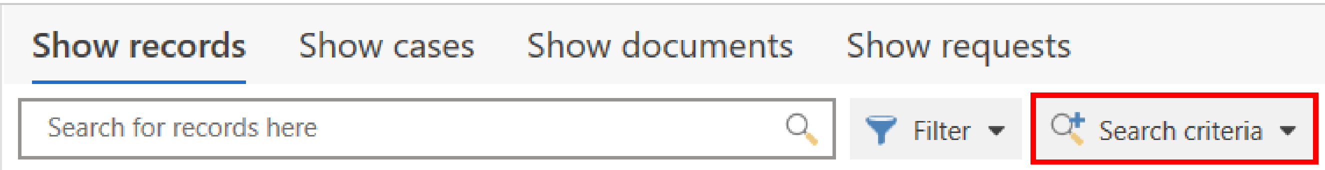


Figure 8. The “Search criteria” button in the main window

When any advanced search criteria are active, the magnifying glass icon changes to a green checkmark.

This makes it possible to see if any advanced search criteria are active, even if advanced search is not.

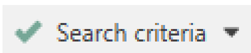


Figure 9. Search criteria are active

Click **Search criteria** to open a drop-down menu with all active search criteria.

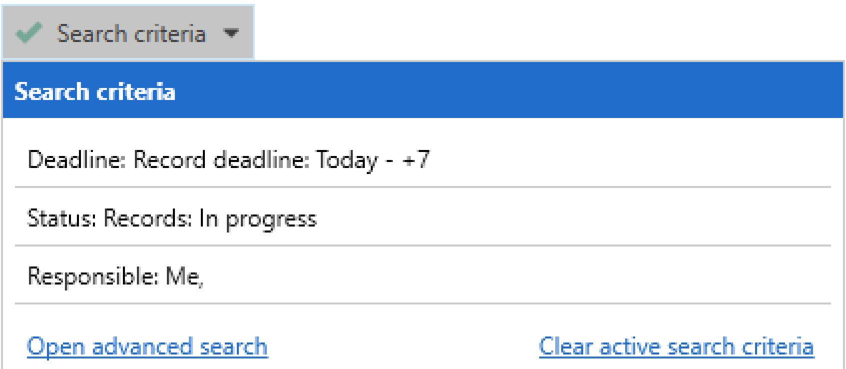


Figure 10. The "Search criteria" drop-down menu

From the drop-down menu it is also possible to navigate to the advanced search or resetting the active search by clicking **Clear active search criteria**. Resetting the search means all active search criteria are removed except those inherent to the list that the search is based on.

Perform the search on this list

After performing a search on a list, the user can perform a search with the same criteria on another list without selecting it or reentering said criteria. Right-click on a list, e.g. the "Archive" (without left-clicking on it first), and select **Perform the search on this list** in the context menu. Note that the search criteria will be lost if the new list is selected before right-clicking.

The function **Perform the search on this list** cannot be used to search in folders.

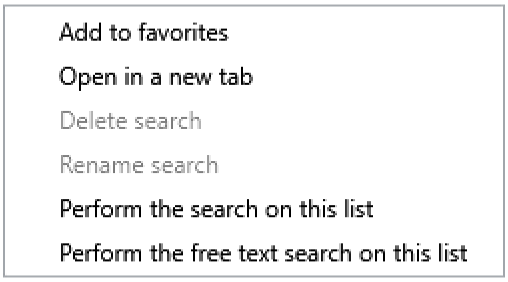


Figure 11. "Perform the search on this list" in the context menu

From the context menu, text from the free-text search field can be reused in a different list. Right-click the desired list and select **Perform the free-text search on this list**. The new list opens with the desired text in the free-text search field and automatically performs a new search. Note that the search criteria will be lost if the new list is selected before right-clicking.

Using f2p links in the free-text search field

F2p links can be used in the free-text search field. F2p links are links created in F2 that lead directly to either a record, case, document, or participant. An f2p link is created using the menu items **Copy link to record**, **Copy link to case**, or **Copy link to document**. Read more about these here. An f2p link to a participant is created using the **Copy link to this participant** function, which is found in the participant's context menu.

Insert an f2p link in the free-text search field either by using the context menu or the shortcut **Ctrl+V**. Press **Enter** to open the record or case directly.

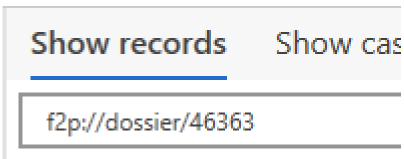


Figure 12. An example of an f2p link

NOTE Since an f2p link refers to a certain record, case, or document, it will always be the element in question that is opened regardless of what the result list is set to display.

Advanced search

Our Quick Guide to advanced search provides an overview of the ways in which you can narrow your search criteria.

A simple search using the free-text search field is often very broad. More precise and useful searches can be made by searching for specific metadata. This is an advanced search.

Advanced searches are performed in the main window using search fields. The fields correspond to metadata from records, cases, chats, and other F2 elements, which enables very specific searches. Click **Advanced search** in the main window ribbon (1) to view the advanced search groups (2).

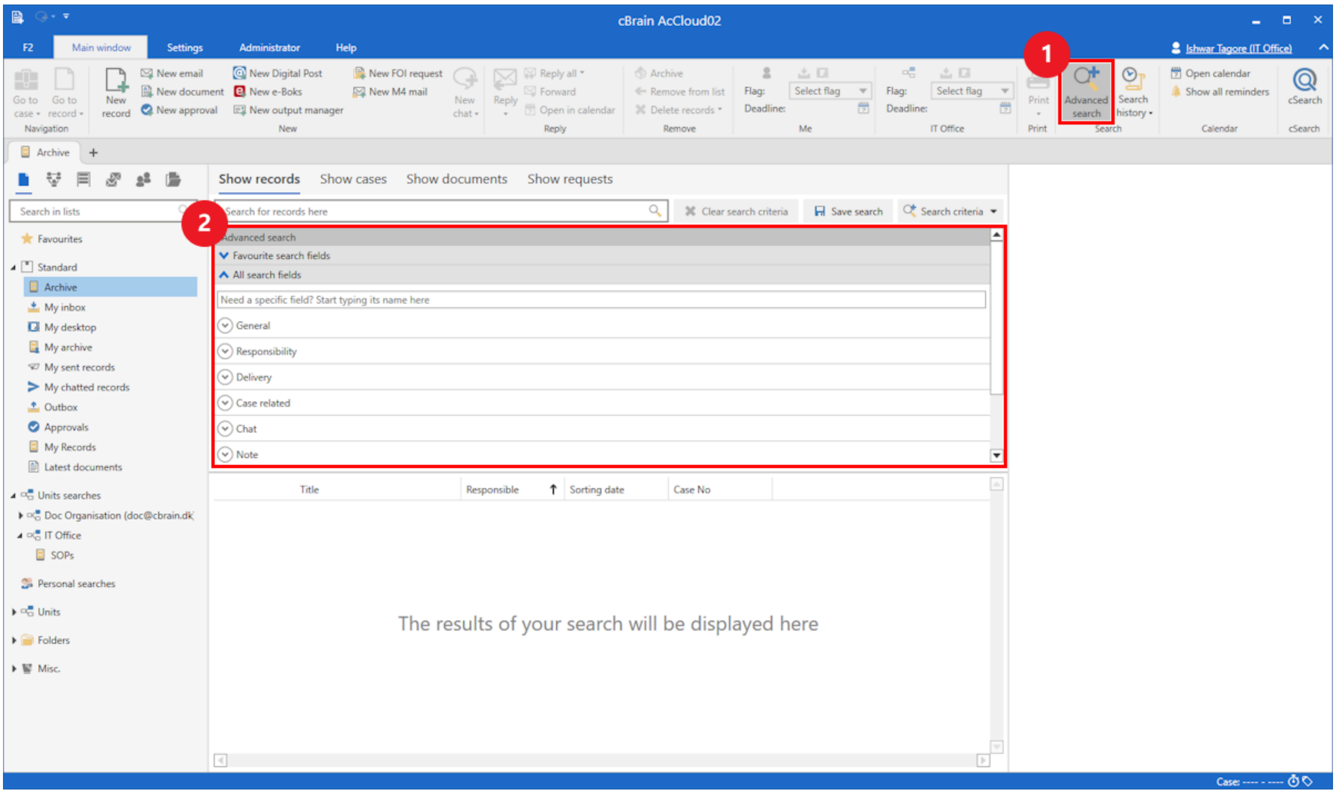


Figure 13. Advanced search enabled

WARNING Remember to check for active advanced search criteria before you start your search, otherwise your search results may be poor or misleading. Read more about how to clear active advanced search criteria.

The height of the search field area is adjustable, making it possible to adjust the visibility of the result list. Click and drag the splitter between the search field area and the result list to the desired location.

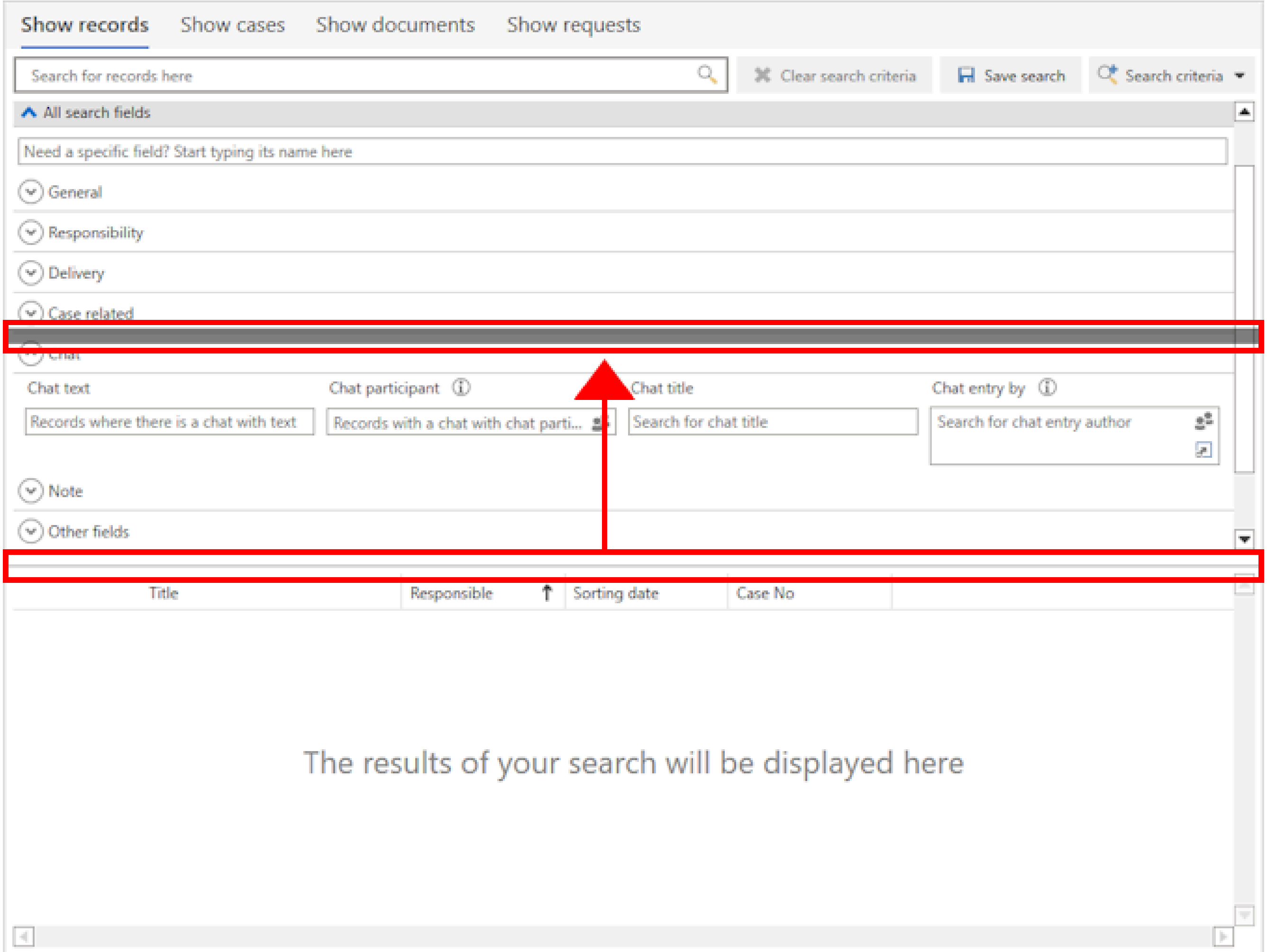


Figure 14. Drag and drop the splitter to the desired location

It is possible to search for a specific search field by entering a search string in the field above the search groups. F2 will then show all search fields in which the search string appears. Pressing **Enter** is not required.

The search fields are divided into groups. Click on a search group to expand it and view its search fields. See the figure below.

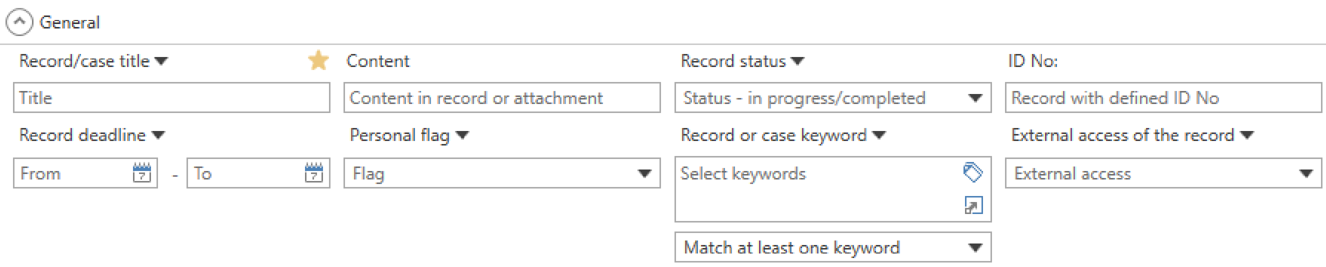


Figure 15. The "General" search group

A field with a drop-down arrow ▼ next to its title allows the user to choose between certain values.

For example, under "Record status" choose whether to search for records with the status "In progress" or "Complete". The search field can also be left empty.

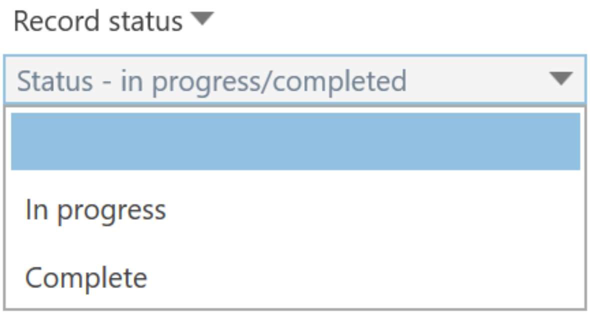


Figure 16. Search options for the “Record status” field

Certain search fields have an information icon, ⓘ. Click the icon to open a description of the specific search terms that can be used in the field. For example, the search terms "Undefined" or "My unit" may be used in the **Access limitation on record/case** field, and "+7" or "Today" may be used in the **Record deadline** field.

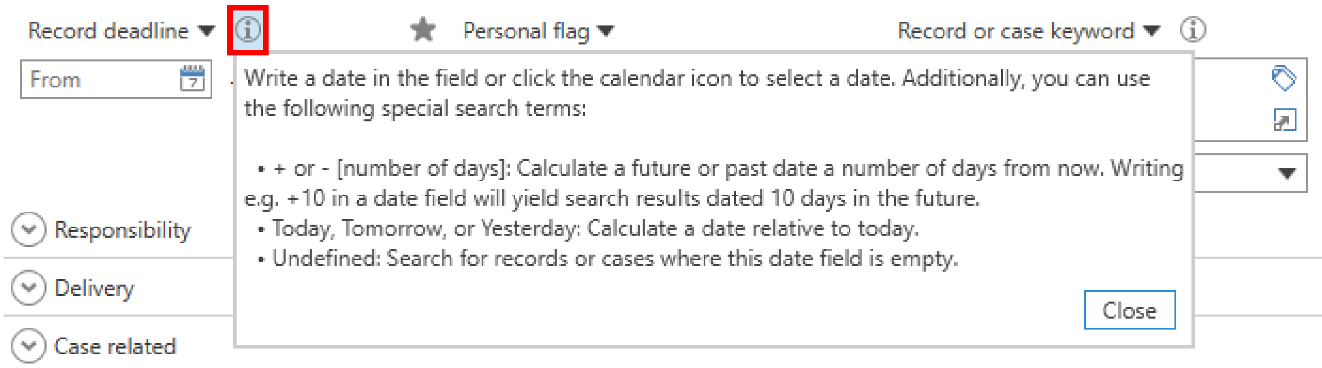


Figure 17. Information about search terms in the "Record deadline" field

You can look up the available special search terms in the table for the relevant search group.

When you want to search for a user or unit, you have the following options:

- Type the name of the user or unit in the search field.
- Click the participant icon in certain search fields to find the user in F2’s participant register.
- Click the unit icon in certain search fields to find the unit in F2’s participant register.

Read more about searches in F2’s participant register.

An additional drop-down menu is available in search fields for keywords and participants on records and cases. Specifically, the search fields “Record or case keyword” in the “General” group” and “Record/case participants” in the “Case related” group. When multiple keywords or participants have been entered, the drop-down makes it possible to search for results matching either at least one or all of the search terms.

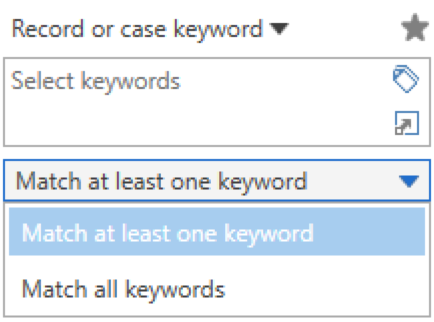


Figure 18. Field with a drop-down operator

When the desired fields in one or more search groups are filled in, click the **magnifying glass** next to the free-text search field or press **Enter** to display the results of the search.

View and clear search fields

The title of a search group is bolded if at least one of its field is filled in. This makes it easier to determine if fields are filled in when the groups are collapsed.

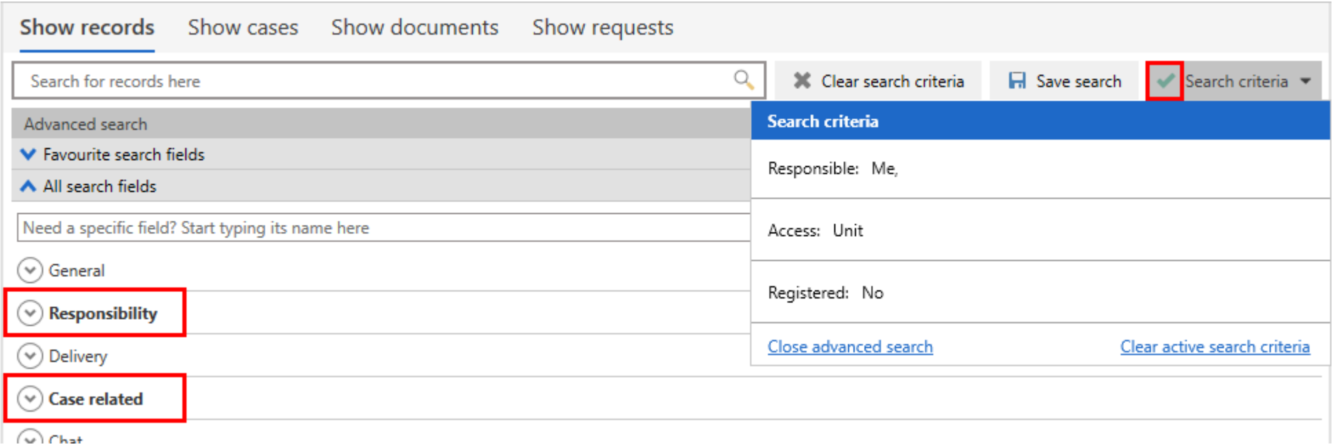


Figure 19. Indications of active search criteria

When a search field is filled in, a green checkmark appears on the **Search criteria** button. The **Search criteria** icon makes it possible to see if any search fields are filled in even if the advanced search fields are hidden.

You can clear any advanced search criteria regardless of whether the advanced search fields are shown or hidden. When the advanced search fields are shown, the **Clear search criteria** button appears to the right of the free-text search field (1).

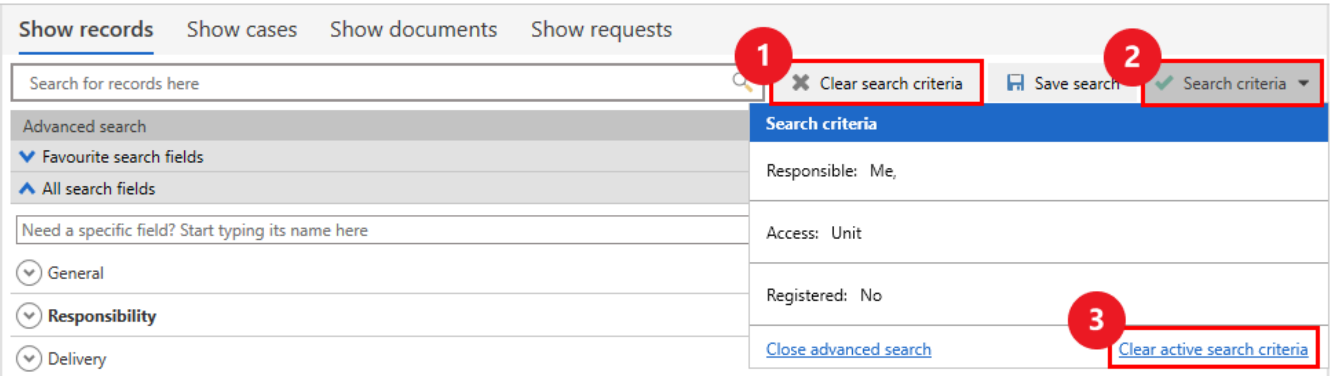


Figure 20. Functions for clearing search criteria with advanced search active

When advanced search is disabled, you can clear active search criteria from the **Search criteria** drop-down (2). Click the button to open the drop-down, then click **Clear active search criteria** (3). You can also clear your active search criteria at any time by pressing **Ctrl + Shift + X**.

When you clear your active search criteria, the list is reloaded. This means the list is updated to show all current results.

NOTE If you clear active search criteria in a saved search, only the search criteria that you have added yourself will be cleared. The saved search criteria that make up the list are unaffected.

Advanced search fields

The metadata search fields are divided into groups. The number of groups may vary according to add-on modules to the F2 installation.

It is possible to use search operators in free-text search fields.

The metadata fields of each group are presented below.

The “Favourites” search group

Users can create a search group with their personal favourite search fields.

Figure 21. The menu item “Edit favourite search fields”

This is done in the main window ribbon by clicking on **Edit favourite search fields**.

A dialogue with a wide range of predefined search fields will open. Click on **Records** on the left side of the dialogue. Tick off fields to add them to the favourite search group as shown below.

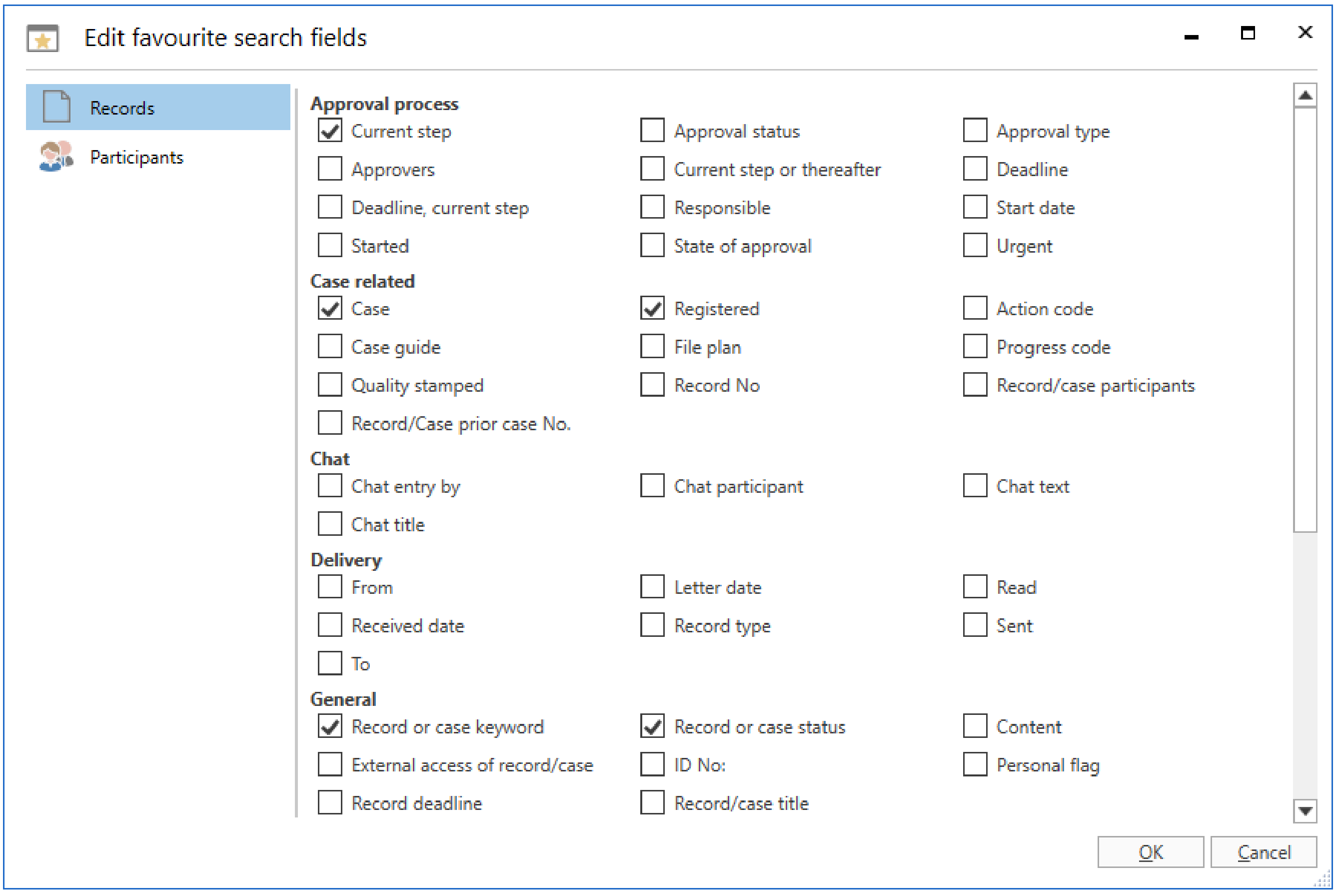


Figure 22. “Edit favourite search fields”

The ticked-off search fields are now included in the “Favourites” search group as shown in the example below.

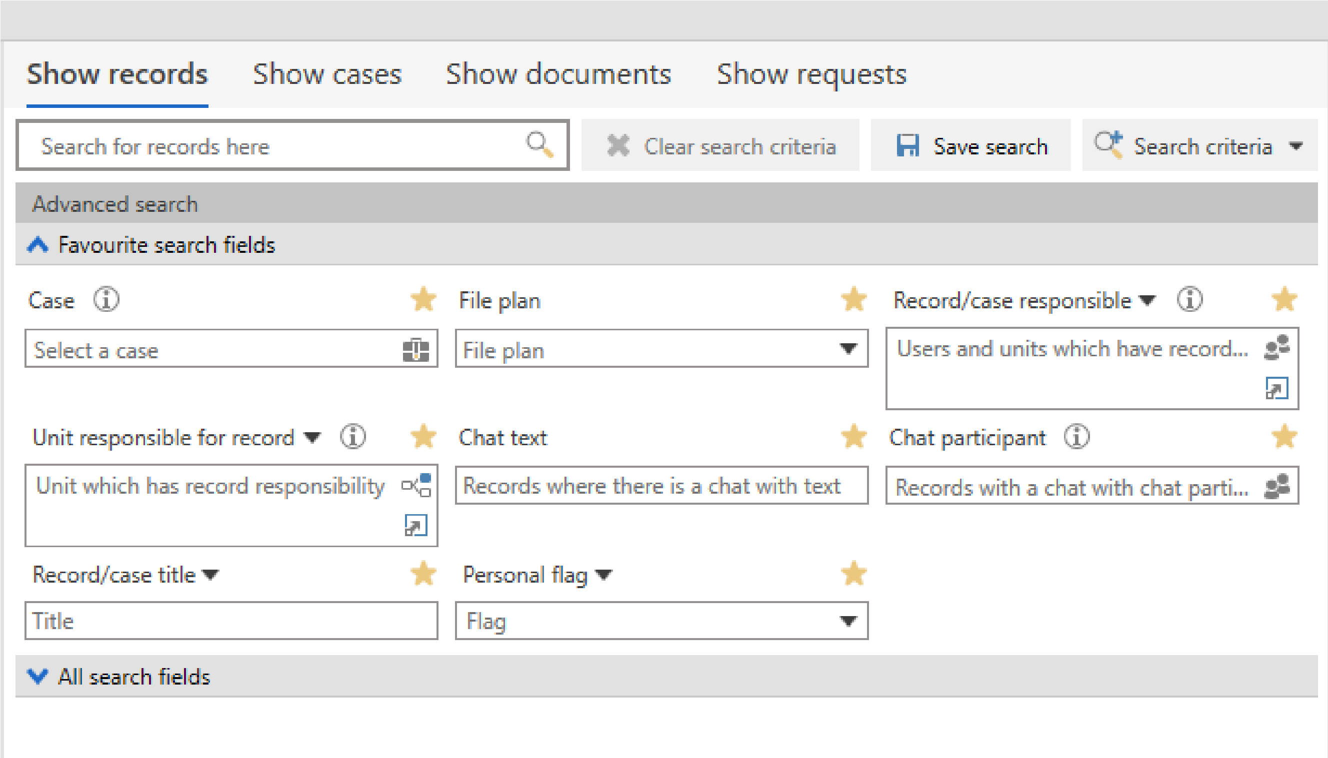


Figure 23. Example of the “Favourites” search group

Search fields can be added to favourites when viewing a search group. To do this, hover the cursor over a search field to make a grey star appear. Click on the **star** to add that search field to favourites. The star turns yellow. Click the **star** again to remove the search field from “Favourite search fields”.

The “General” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Record/case title” “Record title” “Case title” “Current record title”	Search string	Search for records or cases whose title contains the search string. “Record/case title”: • Search for the current record or case title. • For emails, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email. ”Record title”: • Search for the current record title. • For emails, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email. ”Case title”: • Search for the case title. ”Current record title”: • Search for the record’s current title only. **NOTE** The search field ”Current record title” is only displayed if it has been enabled in cooperation with cBrain.
“Content”	Search string	Search for records with attachments whose content matches the search string.
“ID No”	Number	Search for records with a specific ID number.

Search field	Possible values	Description
“Record deadline” “My deadline” “Unit deadline” “Deadline, unit casework” “Case deadline” “Record or case deadline”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Records and/or cases whose deadline is within the specified interval. Records and/or cases with the user’s personal deadline within the specified interval. Records and/or cases with the unit’s case management within the specified interval. Records and/or cases with the unit’s deadline within the specified interval.
“Personal flag” “Unit flag”	Flags	Search for records with the specified flag. Flags are defined via a value list by a user with the “Flag administrator” privilege.
“Record or case keyword” “Record keyword” “Case record”	A certain keyword. A keyword within a specific subject. A keyword or subject which contains a specific text.	Search for keyword(s) specified on the record or case. Makes it possible to create lists based on a certain keyword. Use the drop-down menu to search for results matching either at least one or all entered keywords.
“External access of the record/case” “External access of the record” “External access of the case” (add-on)	Undefined Open Partly open Closed	Search for records shared with external participants via the F2 External Access add-on module.

The “Responsibility” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Record/case responsible” ”Record responsible” ”Case responsible”	User Unit Me My unit	Search for records or cases for which the specified user or unit is responsible. Use the dynamic search terms Me or My unit to search for yourself or your unit. For fixed searches this means that the search adapts to the user who opens it.
“Seen”	Yes No	Search for records marked as seen on the “Unit casework line”.
“Unit responsible for case/record” “Unit responsible for record” “Unit responsible for case”	Responsible unit My unit	Search for records/cases for which the specified unit is responsible. My unit is the unit to which the current user belongs.
“Record/Case suppl. case mgr.” ”Record suppl. case mgr.” ”Case suppl. case mgr.	User Me	Search for records/cases for which the specified user is set as supplementary case manager. This option can be used for finding records for which the user is supplementary case manager and for records on whose case the user is supplementary case manager. It is possible to search for either one of the options or for both.
“Record/case suppl. units” ”Record suppl. units” ”Case suppl. units”	Unit My unit	Works as the preceding search, except this search is for records and cases for which a unit is set as supplementary case manager insted of a user.

Search field	Possible values	Description
“Recipient seen”	All Some Not all Nobody	This field makes it possible to sort a search based on whether the recipient(s) has/have seen the record/email. **NOTE** Only applies to the unit casework line in the record’s metadata.
“Access”	Involved Unit All	Search for records by the specified access level.

The “Delivery” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“From”	User Unit Participant Email address Me My unit	Search for emails sent by the specified participant, user or unit. **NOTE** Searching for a specific unit will both yield results involving said unit as well as results involving the unit’s users. However, this only applies if you select a unit from the participant register or through the auto completer.
“To”	User Unit Participant Email address Me My unit	Search for emails received by the specified participant, user or unit. **NOTE** Searching for a specific unit will yield both results for said unit as well as results for individual users in the unit. However, this only applies if you select a unit from the participant register or through the auto completer.
“Sent”	Yes No	Search for emails based on whether they have been sent.
“Record type”	Undefined Inbound Outbound Internal	Search for records that are either sent to or received from external participants, or records for internal use.
“Read”	Yes No	Search for emails based on whether they have been read.

Search field	Possible values	Description
	Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Undefined = No received date.
“Letter date”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today.

The “Case related” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Case”	Search string Number Defined Undefined	F2 automatically suggests case titles when you start typing in this field. A case can also be selected via the case icon. Searching for Defined will display records with a case association. Searching for Undefined will display records without a case association. The search terms Defined and Undefined are especially useful when combined with other search criteria.
“Registered”	Yes No	Search for records on cases based on whether they have been registered.
“Record No”	Number Undefined	A record is automatically assigned a number when added to a case and then registered.
“Record/case prior case No.” ”Record, prior case No.” ”Case, prior case No.”	Number Undefined	Search for records or cases via a previous case number.
“Record/case participants” ”Record participants” ”Case participants”	Users Units External participants Me My unit	Search for cases in which the specified users/units/external participants are involved. Use the drop-down menu to search for results matching either at least one or all entered participants.
“File plan”	Values in the file plan list, set up by an administrator	Search for cases matching the specified file plan.

Search field	Possible values	Description
“Case guide”	Predefined case guides	Search for the number of cases with the specified case guide.
“Progress code”	Pre-defined progress codes assigned to cases.	Search for applied progress codes.
“Quality stamped”	Yes No	Search for cases based on whether they have been quality assured.

The “Chat” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Chat text”	Search string	Search for chats containing the specified search string.
“Chat participant”	User Me	Search for chats in which the specified user is a participant. **NOTE** Search results will only include chats in which you are a participant.
“Chat title”	Search string	Search for chat titles containing the specified search string.
“Chat entry by”	User Me	Search for chat messages written by the specified user. **NOTE** Search results will only include chats in which you are a participant.

The “Note” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
"Note content on records/cases" "Note content on records" "Note content on cases"	Search string	Search for notes containing the specified search string.
"Note participants"	User Unit Me My unit	Search for notes in which the specified user or unit is a participant.
"Note title on records/cases" "Note title on records" "Note title on cases"	Search string	Search for note titles containing the specified search string.
"Note entry authors on records/cases" "Note entry authors on records" "Note entry authors on cases"	User Me	Search for note entries written by the specified user.

The “Other fields” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Record or case created by” “Record created by” “Case created by”	User Me	Search for records/cases created by the specified user.
“Record or case created” “Record created” “Case created”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for records and/or cases created within the specified interval.
“Access limitation on record/case” “Access limitation on record” “Access limitation on case”	User Unit Security group Team Me My unit	Search for records and cases with an access limitation.
“SSN/CVR No of record/case” “SSN/CVR No of record” “SSN/CVR No of case”	Number	Search for records and/or cases with the specified SSN/CVR number.
“Record/case involved participants” “Record involved participants” “Case involved participants”	User Unit External participant Me My unit	Search for records and/or cases with the specified user/unit/external participant as a participant involved in the record/case.

Search field	Possible values	Description
“External case ID”	Number	Search for records with the specified external case ID.
“Standard search”	Predefined searches in F2.	Predefined searches are available in this field.
“Reminder date”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for records with a reminder date within the specified interval.
“Annotation text”	Search string	Search for annotations containing the specified search string.

The “Approval process” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
“Responsible”	User Unit Me My unit	Search for approvals for which the specified user or unit is responsible.
“Approvers”	User Unit Me My unit	Search for approvals for which the specified user or unit is an approver.
"Copy recipients"	User Unit Me My unit	Search for approvals for which the specified user or unit is a copy recipient.
“Current step”	User Unit Me My unit	Search for records with the specified approver for the current approval step.
“Current step or thereafter”	User Unit Me My unit	Search for records with the specified approver for either the current or a pending approval step.

Search field	Possible values	Description
	- [No. of days]	Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today. Search for approvals with deadlines within the specified interval.
"Final Approval"	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both of the date fields. Use **+** and **–** to create a dynamic period that calculates a date a number of days forward or backward. Search for approvals that are finally approved within the given interval.
“Deadline, current step”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today. Search for approvals with current step deadline within the specified interval.
“Start date”	Date Yesterday Today Tomorrow Undefined + [No. of days] - [No. of days]	Fill in one or both date fields. Use **+** and **-** to define a dynamic period starting or ending a number of days from today. Search for approvals that have been initiated during the specified interval.

Search field	Possible values	Description
“Approval type”	Value list created by an administrator.	Search for approvals of the specified type.
“Started”	Yes No	Search for approvals that either have or have not been initiated.
“Approval status”	In process Completed Cancelled	Search for approvals that are either in process, completed or cancelled.
“State of approval”	Returned Approved Conditionally approved	Search for approvals that have either been returned, approved or conditionally approved.

The “Request” search group

In the table below, the "Search field" column lists each search field variation if more than one is available. For example, "Record or case status" have the variations "Record status" and "Case status". If you can fill in a search field with predefined values, these are italicised in the "Possible values" column.

Search field	Possible values	Description
”Creator”	User Unit Me My unit	Search for requests created by the specified user/unit.
”Creator unit”	A unit My unit	Search for requests with the selected unit or with users from the selected unit as request creators.
”Request type”	Request types - a value list managed by an administrator.	Search for requests based on type.
”Request deadline”	Date Yesterday Today Tomorrow Undefined +[no. of days] -[no. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for requests with a specific deadline. You can search for a specific date and for intervals.
”Internal request deadline”	Date Yesterday Today Tomorrow Undefined +[no. of days] -[no. of days]	Fill in one or both date fields. Use **+** and **–** to define a dynamic period starting or ending a number of days from today. Search for requests with a specific internal deadline. You can search for a specific date and for intervals.
"Request number"	Number	Search for a request with the specified request number.

Search field	Possible values	Description
		contains the specified search string.
”Recipient”	User Unit Me My unit	Search for requests sent to the specified user/unit.
”Recipient unit”	Unit My unit	Search for requests with users from the selected unit as request recipients.
”Executor”	User Unit Me My unit	Search for requests for which the specified user/unit is the executor.
”Current request status”	Created Sent Edited Cancelled Forwarded Accepted Accepted with comment Declined Answer record created Executed Finalised Finalised with evaluation	Search for requests based on the request status. You can select multiple statuses.

Search field	Possible values	Description
”Return to”	User Unit Me My unit	Search for requests to be returned to the specified user/unit.
”Approved”	Yes No	Search for requests that either have or have not been approved.

Search for participants

F2’s participant register contains the internal and external contacts of the organisation as well as the user’s private contacts.

To open the participant register, click on the participants icon on the navigation line above the lists and folders to the left in the main window. You can also use the shortcut **Ctrl + K**. This opens the participant register in the result list.

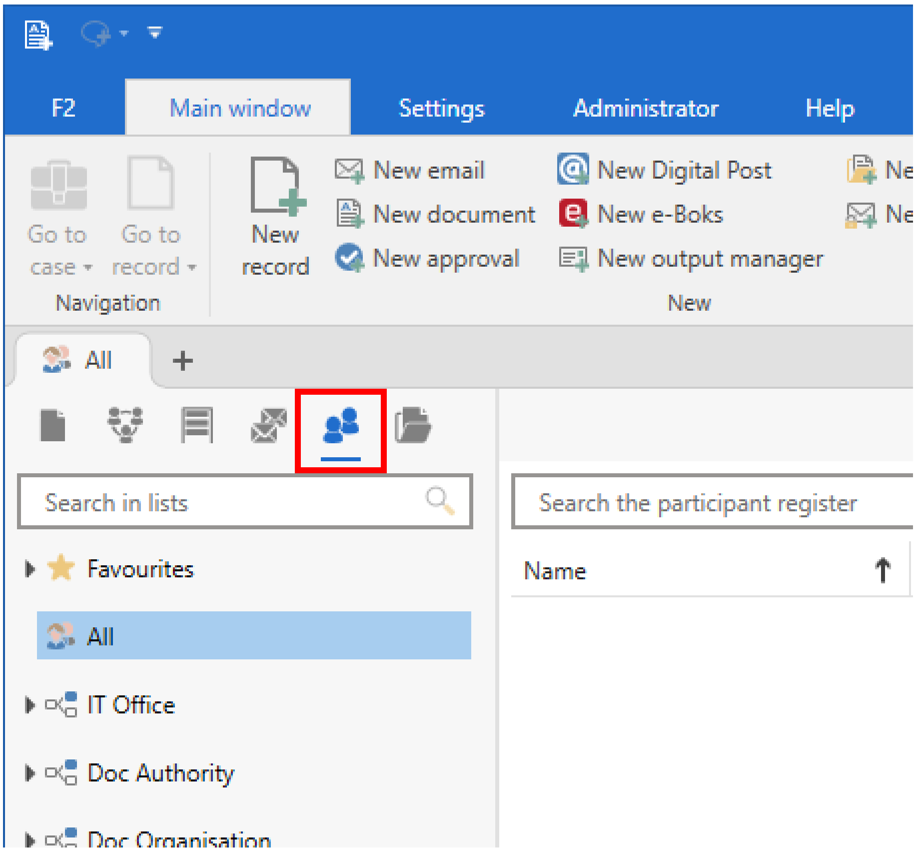


Figure 24. Open the participant register from the main window

With the participant register open, click on the **desired node** in the list view to see its associated contacts. As with the “Archive” in the main window’s list view, a search is not performed automatically when you click the “All” node.

In the participant register, you can search using both the free-text search field and the advanced search fields. Type a text string in the free-text search field to begin filtering the results, and click on the **magnifying glass** or press **Enter** to search in the selected node’s participants and their information. When searching in a node, you are also searching in its sub-nodes and their participants.

Read more about the general principles of advanced search.

Perform an advanced search in the participant register

To perform a search in the participant register, click on **the node** in which you would like to perform a search.

The following nodes are available:

- All contacts
- The organisation's authority and units
- External contacts
- Private contacts.

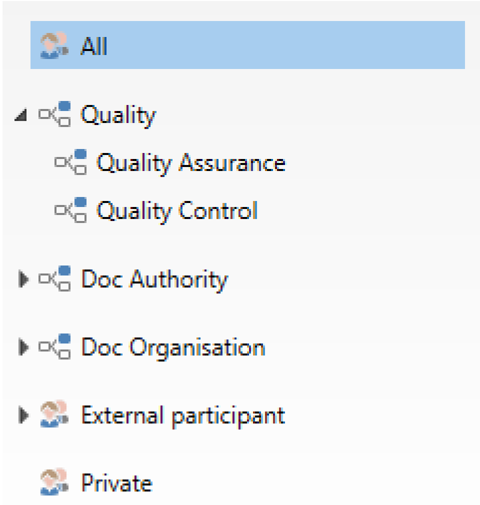


Figure 25. Nodes of the participant register

When you have chosen a node, you can perform a search by either using the free-text search field or by clicking on **Advanced search** in the main window ribbon.

Clicking on **Advanced search** opens a drop-down menu of search groups in which it is possible to search for specific metadata. See the example below.

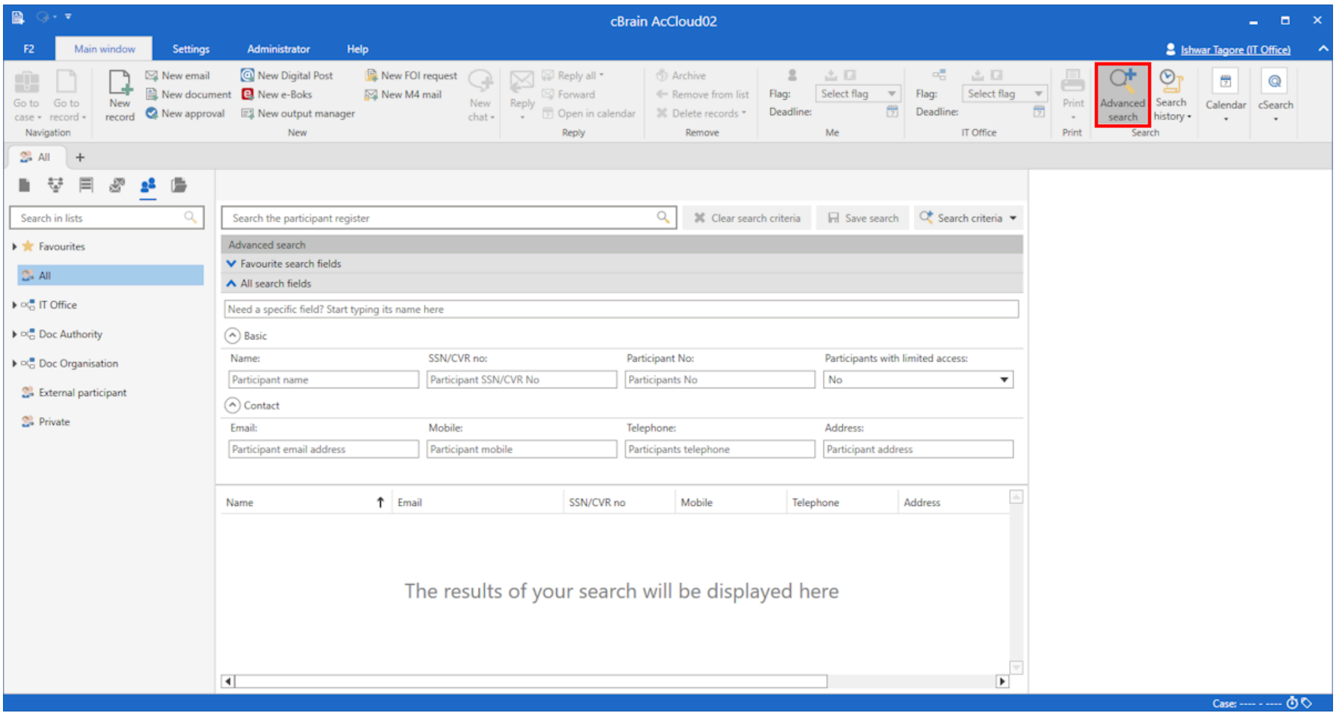


Figure 26. Use metadata fields to search for participants

Favourite search fields

You can create a search group with your personal favourite search fields.

Figure 27. The menu item "Edit favourite search fields"

Click on **Edit favourite search fields** on the "Settings" tab in the main window. This opens a dialogue showing a range of predefined search fields.

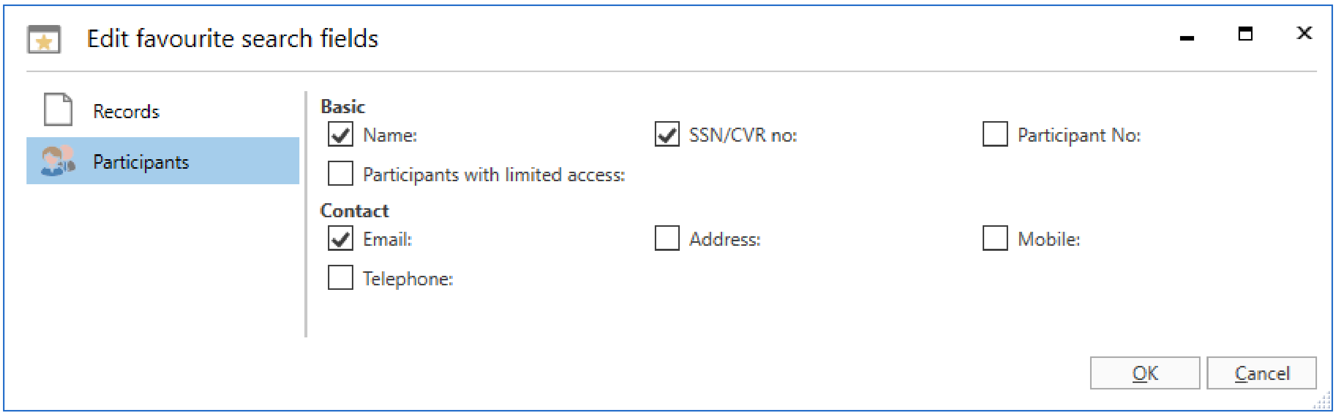


Figure 28. The "Edit favourite search fields" dialogue

Click on **Participants** to the left in the dialogue and tick off the search fields you want to add as favourites. Click **OK** to finish.

The selected search fields are then added to the "Favourite search fields" group in **Advanced search**, which is accessed from the main window ribbon. See the example below.

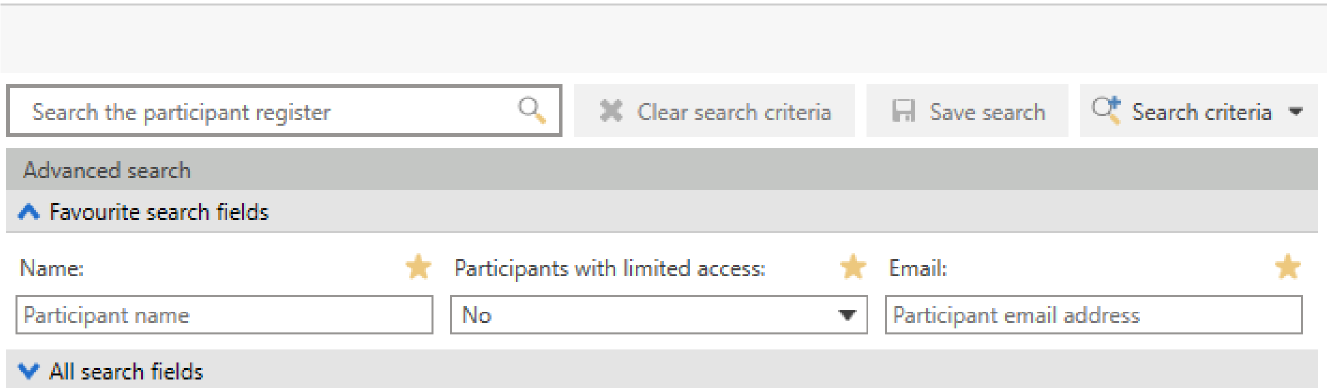


Figure 29. Open favourite search fields in the participant register

You can also add search fields to favourites when viewing a search group. To do this, hover the cursor over a search field until a grey star appears. Click on the **grey star** to add the search field to favourites. The star turns yellow. Click the **yellow star** if you want to remove the search field from your favourites.

Participant search fields

The table below describes each search field and its use.

The “Basic” search group

Search field	Possible values	Description
“Name”	User Unit	A search is performed for a participant with this name.
“SSN/CVR no”	Number	A search is performed for a participant associated with this SSN/CVR number.
“Participant No”	Number	A search is performed for a participant with the number that was automatically assigned by F2 when the participant was created in the register.
“Participants with limited access”	Yes No	A search is performed for an external participant with limited access (add-on module).

The “Contact” search group

Search field	Possible values	Description
“Email”	Email address	A search is performed for a participant associated with this email address.
“Mobile”	Number	A search is performed for a participant associated with this mobile telephone number.
”Telephone”	Number	A search is performed for a participant associated with this telephone number. **NOTE** If the "Private phone" field is configured, it is included in searches with this field.
“Address”	Address, town/city and postal code	A search is performed for a participant with this address, town/city or postal code.

Filtering search results

As in the main window, it is possible to filter the search results in the participant register. The filtering options “Active” and “Inactive” are used for this purpose. Access the filters by clicking the **Filter** button.

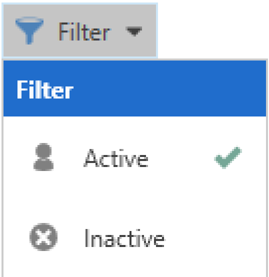


Figure 30. Participant register filter options

The table below describes each filter option.

Filter	Description
Active	Shows all active participants in the participant register.
Inactive	Shows all inactivate participants in the participant register.

Related searches

Related searches are used to keep track of the participant involved in a number of records and/or cases. This provides the user with a comprehensive overview of the participants involved in selected records and/or cases simply by right-clicking.

This search also works in the opposite direction so that it is possible to see records and/or cases in which selected participants are involved.

Related searches are used for:

- Searching for participants based on records/cases
- Searching for records/cases based on participants.

This search can be performed by right-clicking in either the main, record or case window as well as the record and case previews.

F2 comes with the following pre-defined related searches:

- All participants involved in one or more selected records.
- All participants involved in one or more selected cases.
- All records in which the selected participants are involved.
- All cases in which the selected participants are involved.

NOTE The term “Involved” includes everything from “Responsible”, “Supplementary case manager” to email sender and recipient.

A related search always displays its results in a new search tab in the main window.

NOTE	It is possible to configure customer-specific related searches at the organisational level. This makes it possible to add functions for performing related searches based on metadata, for example searches for records where specific participants are listed as "Responsible". In some instances, related searches can also be configured to automatically open the first search result. Contact cBrain for more information.

An example of a related search:

Stanley Matthews wants to see which participants have been involved in a number of records in his inbox.

Stanley selects these records and right-clicks to open the context menu. Here he selects **Related** and then clicks on **All participants on these records**.

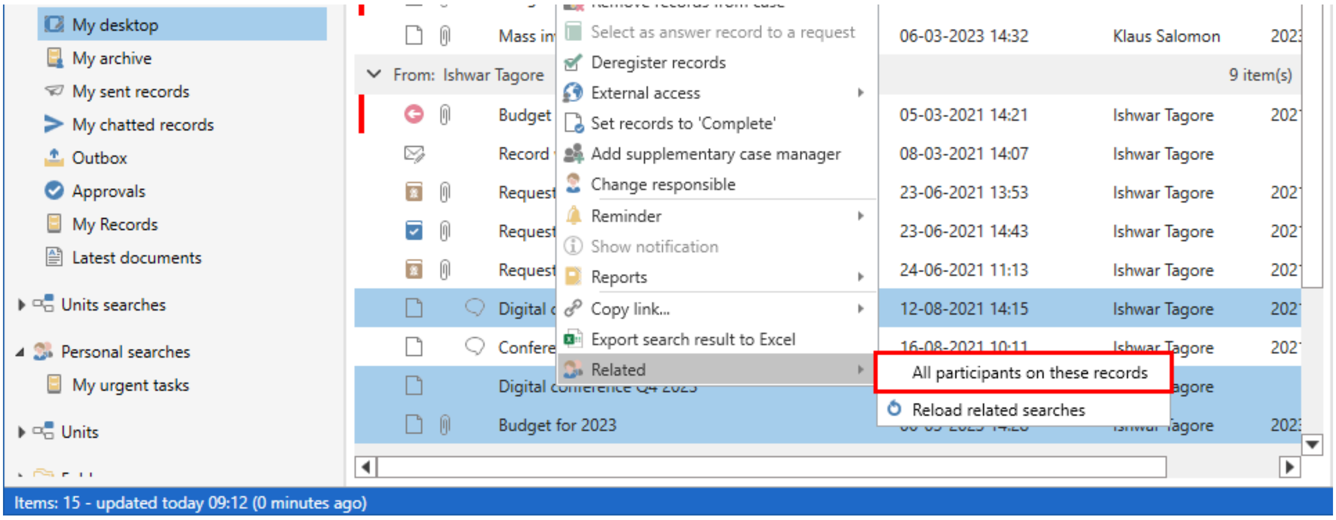


Figure 31. Find all participants involved in the selected records

F2 then opens the “All” node in the participant register on a new search tab in Stanley’s main window. The search tab shows all participants involved in the records that he selected.

Now Stanley wants to narrow down his search. He wants to know in which cases the participants Hannah Hendricks and Hector Richards have been involved. For this reason, Stanley selects them from the search results in the “All” search tab and right-clicks to open the context menu. He selects **Related** in the menu and clicks on **All cases with these participants**.

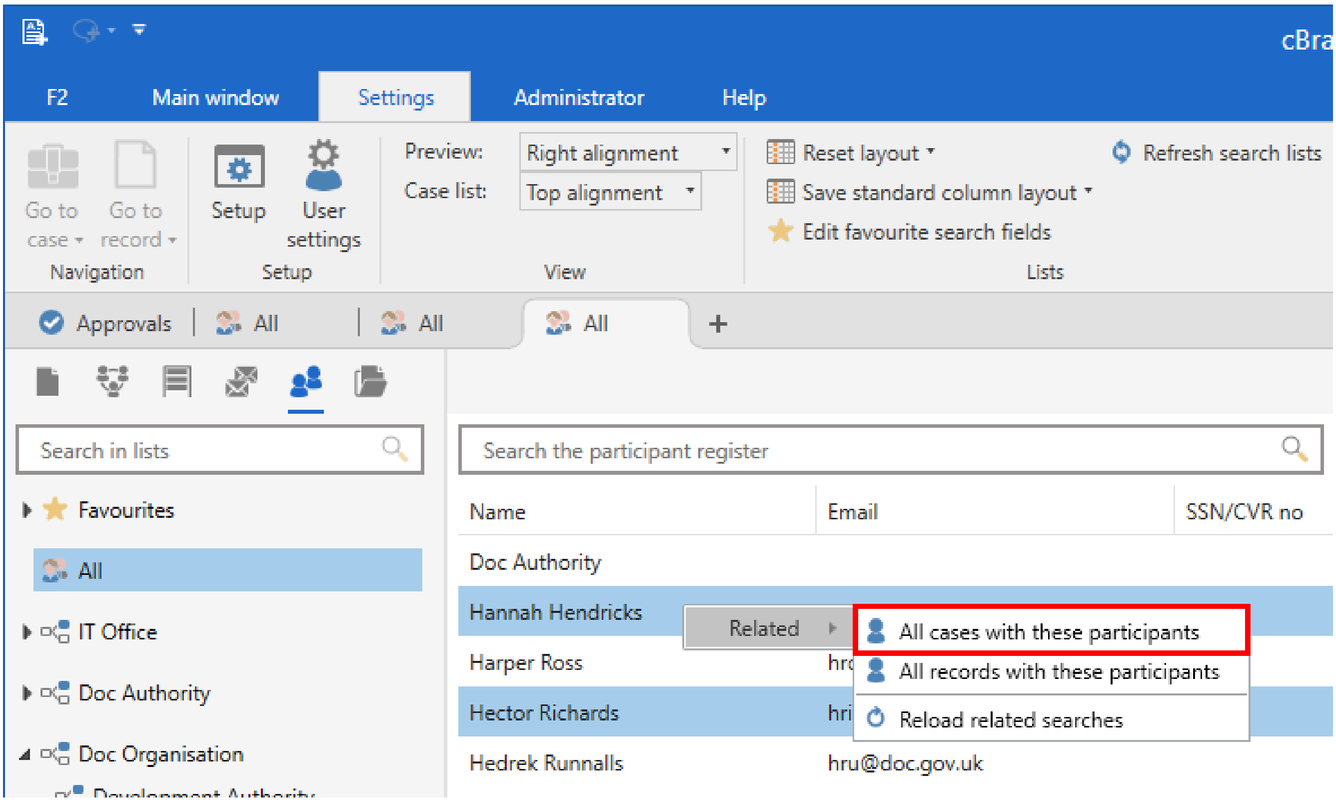


Figure 32. Find all cases with the selected participants

F2 opens a new search tab with all cases in which the participants Hannah Hendricks and Hector Richards are involved. Using related searches, Stanley can continue searching from records or cases to participants and from participants to records or cases.

Search using operators

Searches in F2 can yield an extensive list of results. Using operators may help narrow down the results to make it more useful. You can use operators in both the free-text search field and in advanced search fields where you can enter text.

The following operators are available in F2:

- Asterisk (*)
- AND
- OR
- NOT
- Quotation marks (“ ”)
- Parentheses

F2 regards the list above solely as operators. It is not possible to perform searches that consist only of these symbols or words as they are used for defining a search. In other words, *, AND, OR, NOT, (), and “ ” cannot be used as search strings.

Combine search operators

It is possible to combine different search operators. This means you can use multiple operators in the same search string in the free-text search field. F2 will then find results where the entire search string is valid for the same object. An object is, for example, the title of a record, an attached document, or the title of a case.

Example: If you search for "citizen AND letter NOT inquiry", F2 will find results where "citizen" and "letter" appear in the same object, but the word "inquiry" does not. The word "inquiry" may still appear elsewhere in the search result, such as in the case title.

Search using asterisk *

Enter a search string followed by * to search for words in which that string is included. If day* is typed into the search field, all records in the chosen list whose content, title, or case title contain words that begin with day (e.g. “days” or “daytime”) will appear in the result list.

Strings written in a search field without the asterisk (*) are perceived as whole words. For example, typing day in a search field will return any records that contain the word “day”, but not records that, for example, contain the word “days”.

NOTE It is only possible to use an asterisk as a suffix when searching, e.g. in day*. Using * before or in the middle of a word will yield 0 search results.

Search using AND

Typing AND between two search words will search for records that contain both words. This means that typing minister AND department only yields results containing both “minister” and “department”.

A search with two words separated by a space will be carried out as if there were an AND between the words. AND is thus the implicit operator between two words when nothing else is specified.

Search using OR

Typing OR between two search words will return records containing either word. This means that entering minister OR department will return all records containing either “minister” or “department”.

Using OR, F2 will search for records whose content, record title, or case title contains one or both search words.

Search using NOT

The NOT operator is for searches in which a user needs results whose content or title contain search word A, but exclude search word B. This can be done by entering [search word A] NOT [search word B].

For example, searching for ministry 2023 NOT department will return all items in the selected list whose content, title or case title contain both the words “ministry” and “2023”. It will exclude results containing the word “department”.

It is not possible to perform a search that contains only “NOT” followed by a word. The reason is that the database has to generate a positive search list before it can remove records which do not contain the term specified after “NOT”.

Search using quotation marks “”

If a word combination is put in quotation marks (“”), for example “Mary Smith”, F2 will search for this exact search string. This means that items containing “Mary Jane Smith”, “Mary and John Smith”, etc. will not appear in the result list.

Search using parentheses

Search words are grouped by using parentheses. For example, a search for meeting AND agenda OR participants will give results that contain either the two words “meeting” and “agenda” or results containing the word “participants”. The search can be more precise by adding parentheses around some of the search words. For example, a search for meeting AND (agenda OR participants) will give results containing both “meeting” and “agenda”, along with results containing both “meeting” and “participants”.

Stop words configuration

A function called “Stop words” can be applied to searches. This is done in cooperation with cBrain. Stop words are words, symbols, etc. that are excluded from free-text searches.

These include common words such as “and”, “but”, or “for”. If the user enters a stop word in a search or metadata field while the “Stop words” function is active, no results will be displayed.

The search result view

The results of any search are displayed in the result list in F2's main window. The user can choose to view the result list as a list of records, cases, documents, or requests. In the example below the result list is shown as records.

You can limit the number of displayed search results through your personal settings. For example, changing the number to 300 will limit result lists so they never show more than 300 items.

View records, cases, documents, or requests in the result list

There are four different views of the main window's result list. You can can switch between the views above the free-text search field. Here you can show the result list as either records, cases, documents, or requests.

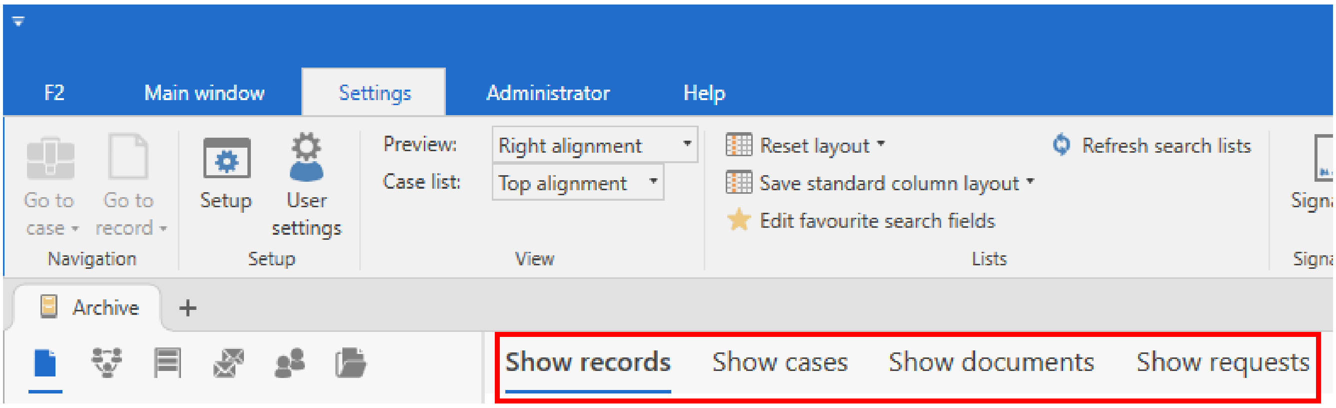


Figure 33. View the result list as records, cases, documents, or requests

NOTE When you select the case view, the result list will display cases and their associated records. In this view, you cannot see records without case association.

Show records

Select **Show records** to display your search results as records. The result list consists of all records that match the list's search criteria.

It is possible to view any attached documents by clicking on paperclip icon as shown below.

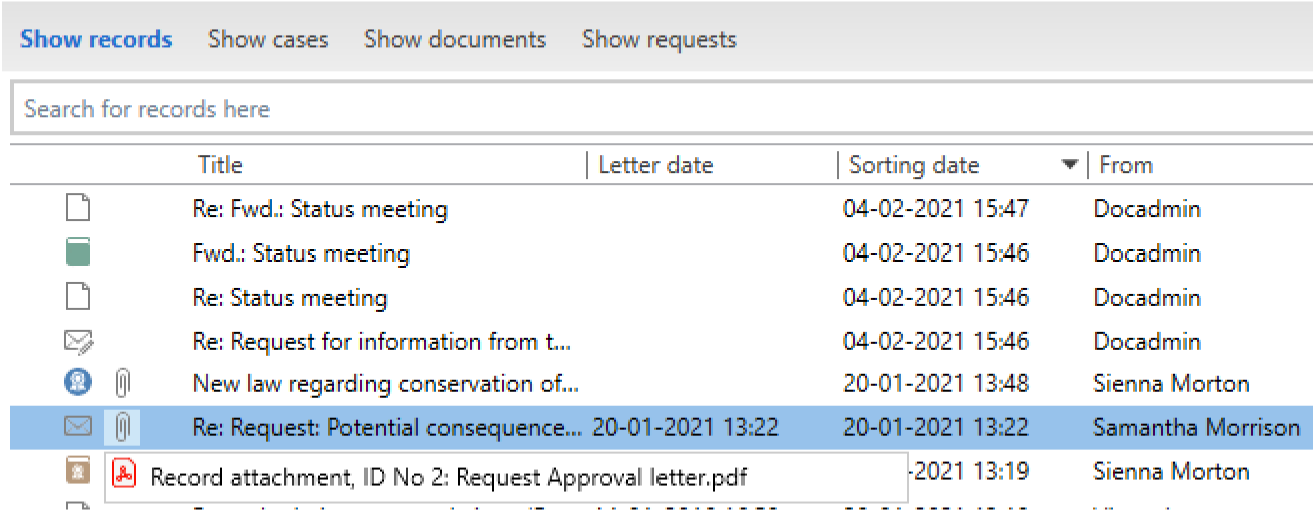


Figure 34. Show records with attached documents

Show cases

Select **Show cases** to display your search results as cases. The records of a selected case are displayed in the record list either to the right of or below the case list as shown below. When viewing cases, you cannot see records without a case association.

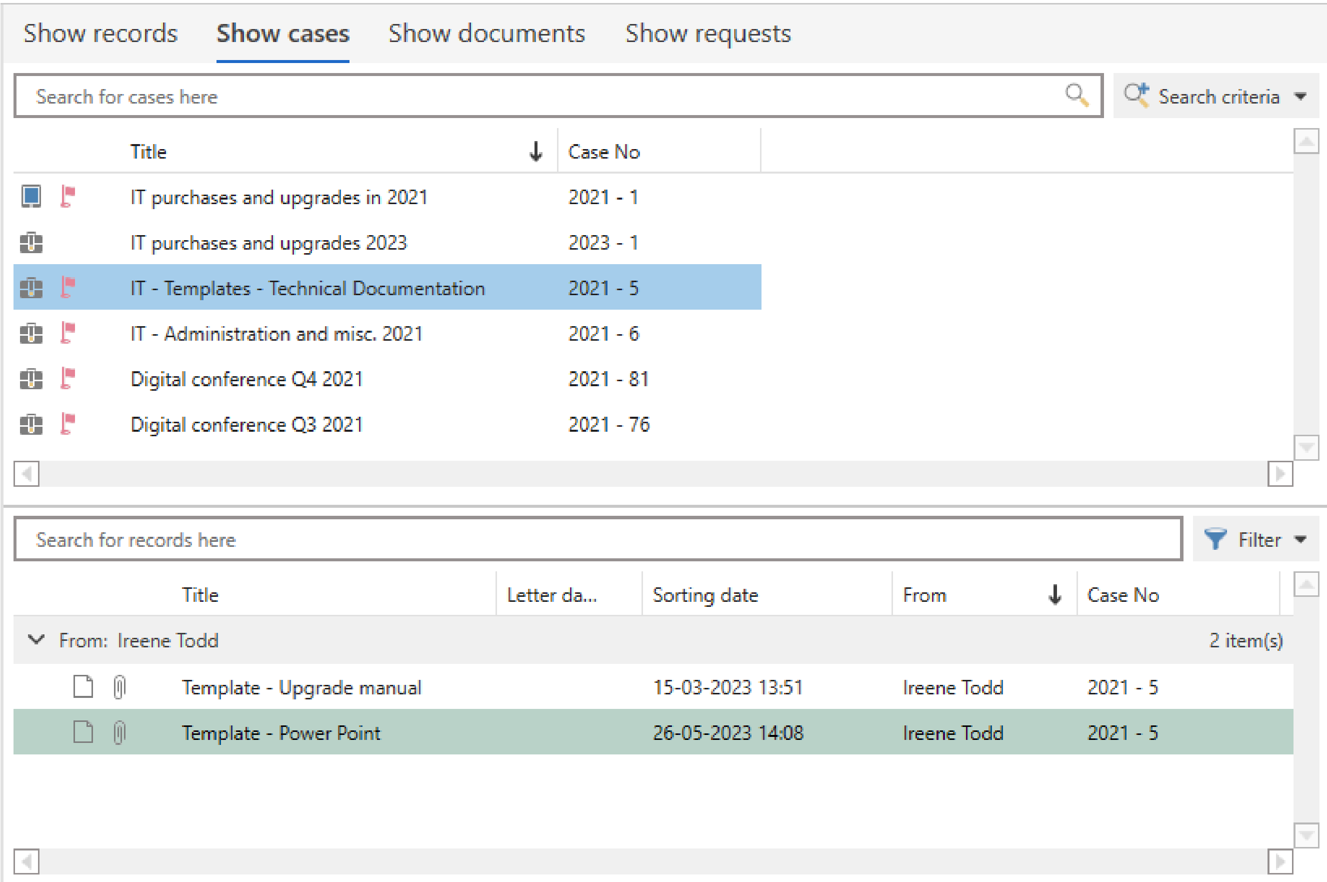


Figure 35. Show cases in the result list

WARNING If you choose this view in "My inbox", you will not see new emails imported to F2. The only exception is emails that are already associated with a case.

The selected case's list of records have a separate free-text search field associated with it. This allows filtering in the same manner as when the result list shows records. Read more about this in the sections Search with filtering and The “Filter” button.

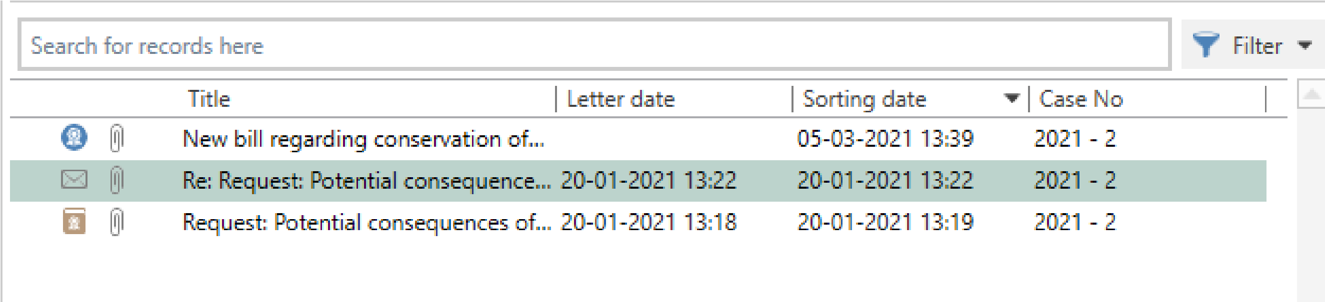


Figure 36. The records on the selected case

Additionally, F2 highlights the records on the case which match the active search criteria of the selected list. The highlight is green, as shown above. In this example, one of the records are highlighted despite the free-text search field having no active search criteria. The record is instead highlighted because it is located in the active list, “My desktop”, in which the case was found. The records with white backgrounds are on the case, but not in the selected list.

The "Filter" button in the case view

The **Filter** button is found to the right of the record list. This button, like the one in the result list, allows for filtering of the case’s records by “Unread”, “With chats”, “With documents”, and “With flags”, and in this view also offers filtering by “Match”. Select “Match” to only see the records that match the list’s search criteria.

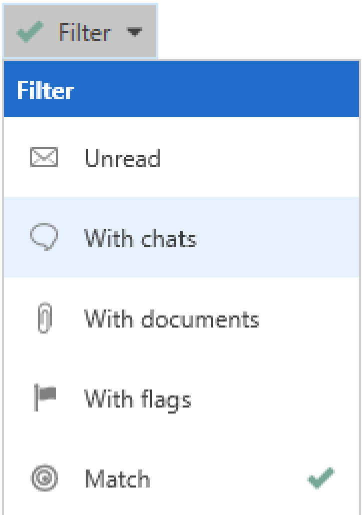


Figure 37. The

Read more about the “Filter” button.

Show documents

Select **Show documents** to display documents in the result list. A padlock icon is displayed next to a locked document. A locked document cannot be edited. A document may be locked if it is attached to an email or if the responsible user has chosen to prevent it from being updated.

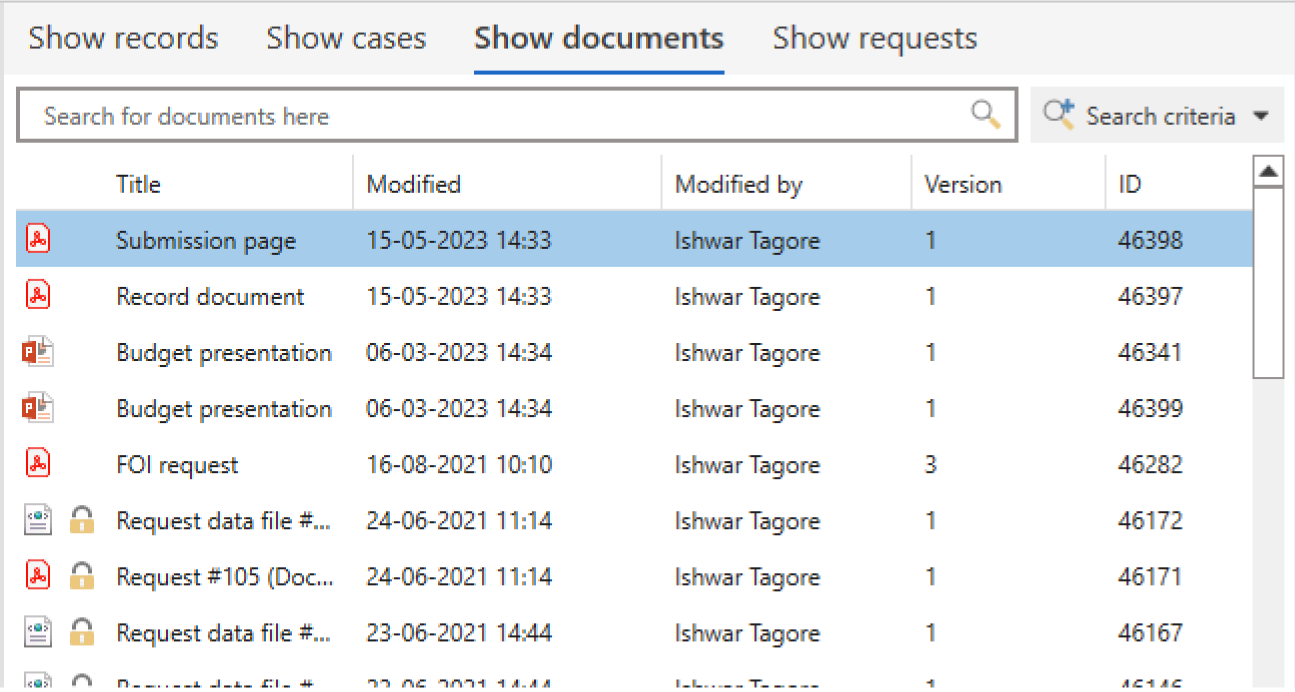


Figure 38. Show documents in the result list

Double-click on **a document** to open it.

The result list displays all documents attached to records matching the search criteria. If a record has multiple documents attached, they will all be displayed as long as at least one matches the search criteria. This is because F2's free-text search is based on records, and a document's contents, title, and external ID are considered parts of its record.

Show requests

Select **Show requests** to display your search results as requests.

Double-click on a **request** to open its record. If there are several requests on the same record, the record will appear several times in the list as only one request is displayed per line.

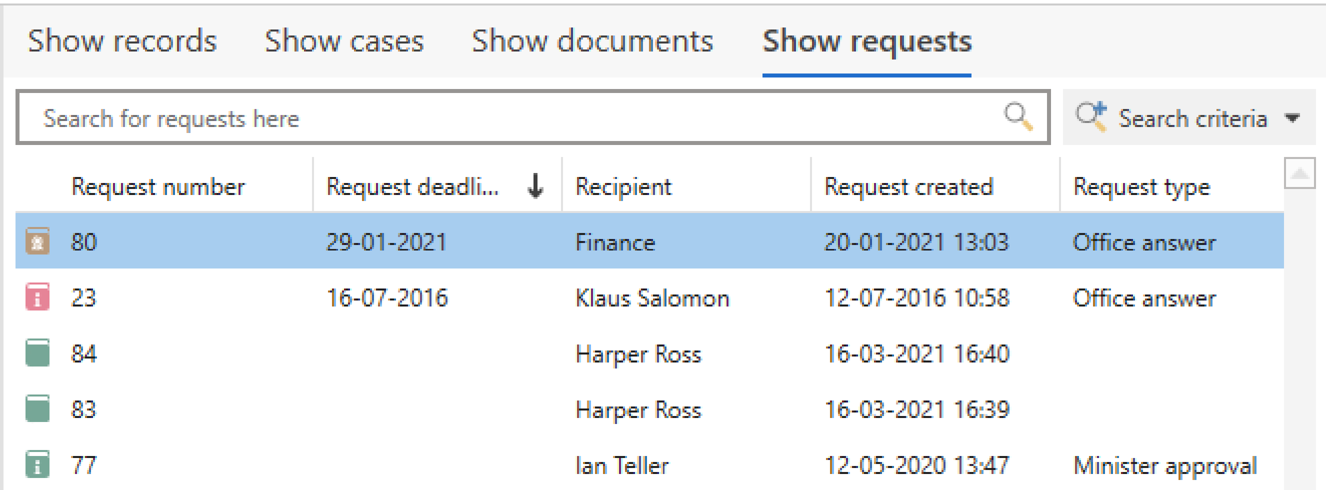


Figure 39. Show requests in the result list

Auto grouping

It is possible to group F2's result list based on a selected column by using auto grouping. Click on **Auto grouping** in the "Settings" tab to toggle auto grouping.

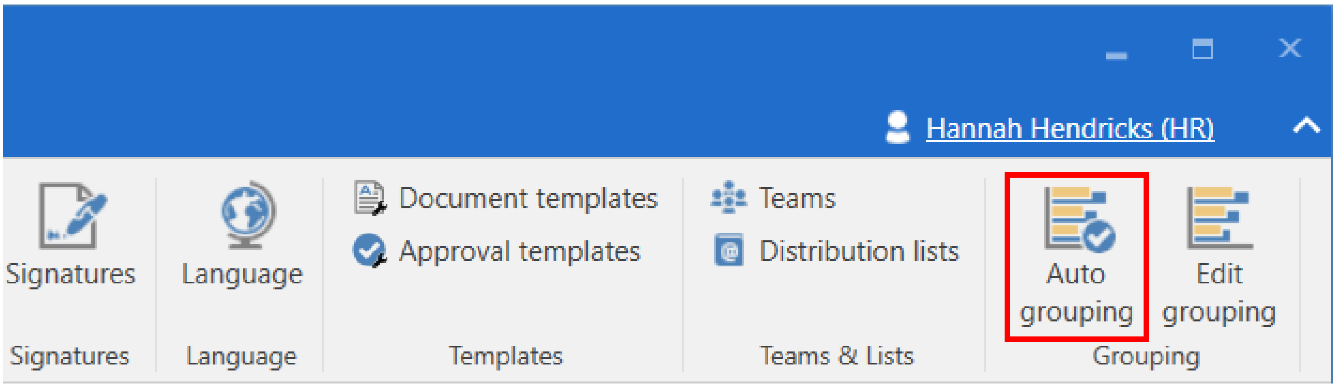


Figure 40. "Auto grouping" in the "Settings" tab

If its menu item is highlighted, **Auto grouping** is enabled.

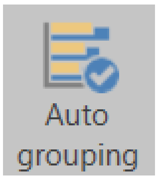


Figure 41. Auto grouping enabled

If its menu item is not highlighted, **Auto grouping** is disabled.

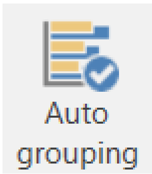
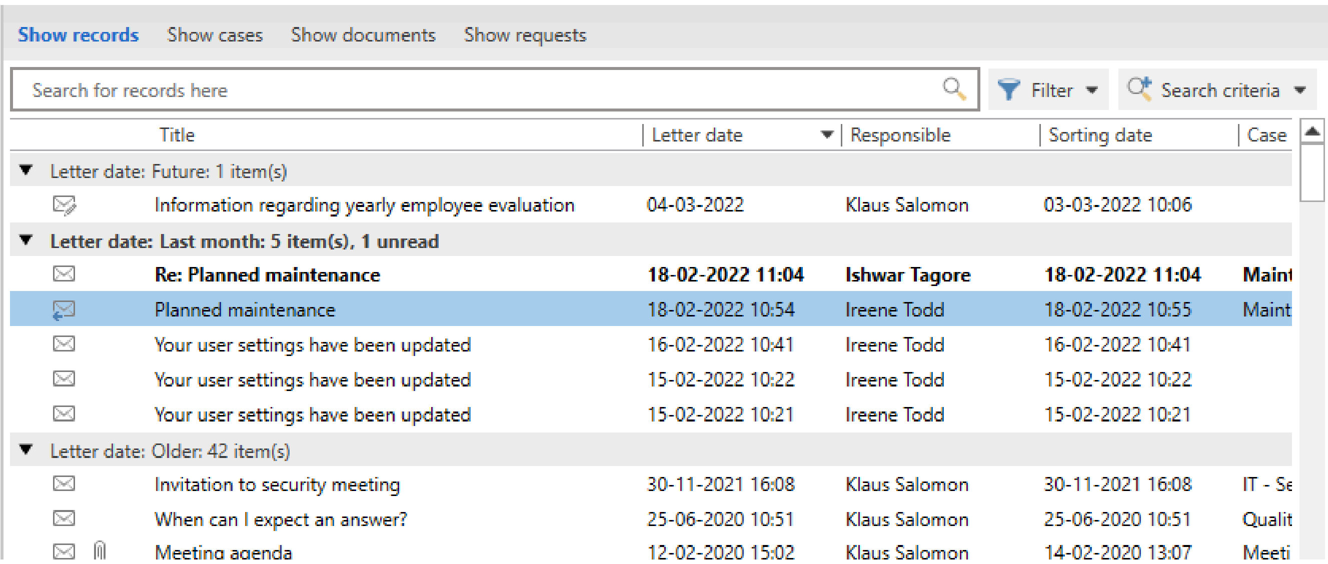


Figure 42. Auto grouping disabled

Each subgroup header displays the number of items it contains as well as the number of unread items. This applies to both the main and case windows.



It is possible to set a future date as the letter date on a record. This may be useful if a case manager has written a letter before it has to be sent. In the result list, a “Future” subgroup allows the user to keep track of records with a future letter date. The “Future” subgroup will appear as the top group in the result list when the results are sorted by letter date.

Edit grouping

The standard columns in the result list are chosen during the configuration of F2. Users can also configure the result list by creating their own grouping of columns.

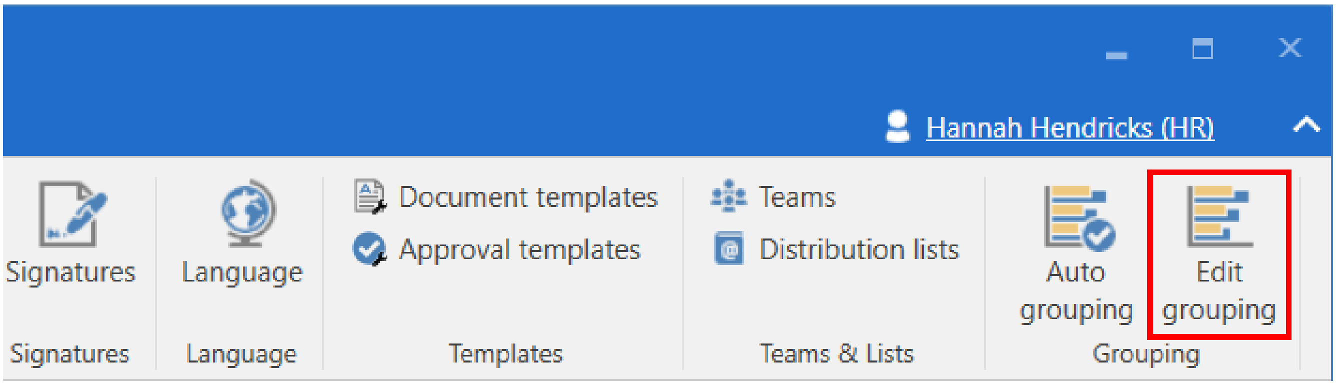


Figure 44. “Edit grouping” in the “Settings” tab

Click on **Edit grouping** in the “Settings” tab to view group headers in the result list.

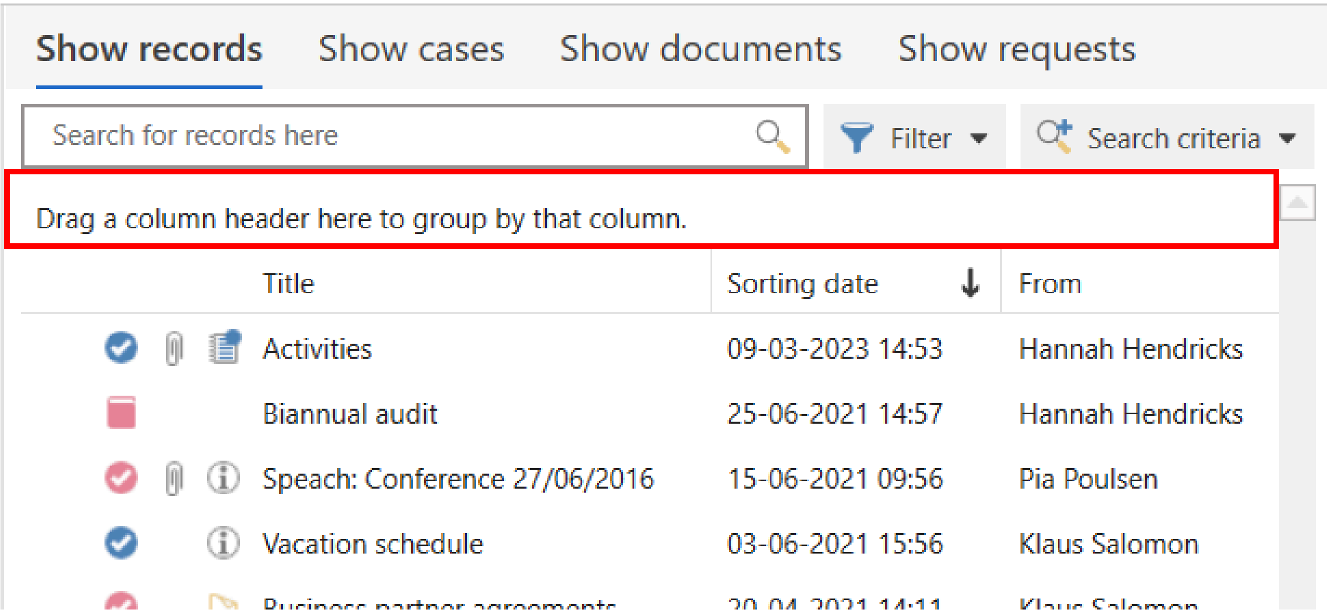


Figure 45. The grouping area

The results are grouped by dragging the desired column header to the grouping field, thereby creating a grouping hierarchy as shown below. You can add another level of grouping by dragging an additional column headline to the grouping field. The hierarchy remains even if you later remove the columns from the result list.

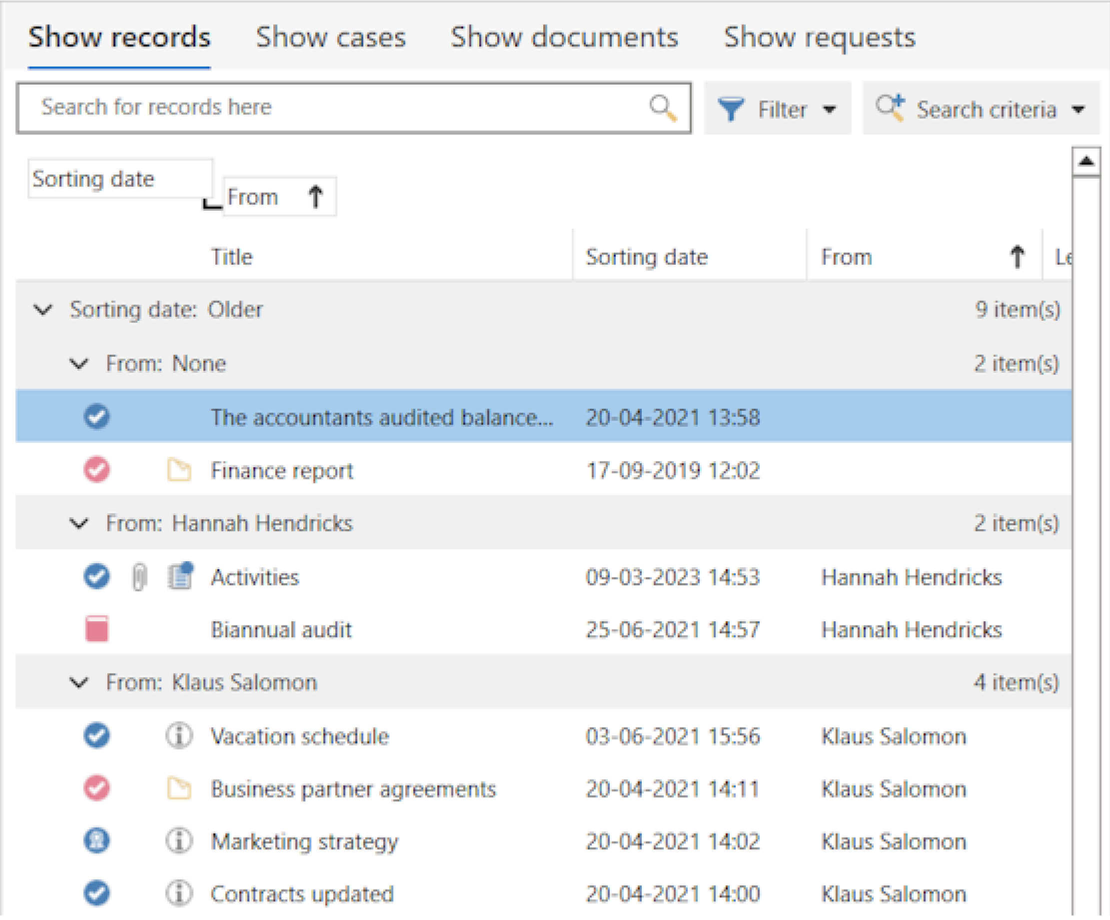


Figure 46. User-created grouping hierarchy

Click **Edit grouping** in the ribbon again to remove the grouping area and with it the grouping option. You can also remove the grouping area by dragging the column headers back down to the result list.

The **Edit grouping** menu item is only active when **Auto grouping** is disabled.

WARNING	Enabling auto grouping will remove any grouping hierarchy you have created. If you then disable auto grouping, it will be necessary to rebuild your grouping hierarchy.

Sort the result list

The result list contains your search results, which can be sorted using columns.

As when sorting the inbox and other lists, you can choose how to sort a list by clicking on **a column**. Each column can be sorted in ascending or descending order.

You can sort your search results in two levels. To do this, click on the first column to sort by. Then hold the **Shift** key and click on the second column you wish to sort by.

F2 remembers which column a given list was last sorted by. All lists are individually sorted and saved.

Columns

The tables below describe each column in the result list and its use.

The columns available depend on the selected view, i.e. records, cases, documents, or requests. The number of columns may vary between installations. Certain columns are only available if the relevant add-on module is installed.

Read more about column layout.

Columns in the record view

The following columns are found when viewing records in the result list. The columns are divided into different groups. Certain columns are associated with specific add-on modules, such as Request or Approvals.

Record columns

Column	Description
“Access”	Shows the record’s access level.
“Annotations”	Displays the number of annotations on a record.
“Archive area”	Shows whether the record is located in: • “Archive” • “Library” • “My deleted records” • “My private records”.
“Case help”	Shows whether case help is activated on a record.
“Created by”	Displays the user that has created the record.
“Date created”	Displays the date automatically allocated to a record when it is created.
“Deleted by”	Displays the user who has deleted the request. **NOTE** This column only contains values if the chosen list is either “My deleted records” or “Search all over”.
“Document locked”	Shows whether the documents attached to a record have been locked for editing.
“External access”	Shows whether external sharing of a record is: • Open • Partially open • Closed. **NOTE** This field is configurable and options may vary between organisations.
“Keywords”	Displays the keywords associated with the record.
“Latest update”	Displays the time of the most recent change in a record, the metadata of a record, or the documents of a record. These

Column	Description
	changes are also found in the history of the record.
“Locked”	Displays whether a case is included in the periodic delivery to the National Archives. **NOTE** The period shift function (ongoing delivery) to the National Archives is active only if the technical service called period shift is enabled. Therefore, it is not possible to select the value, it can only be searched for.
“My flag”	Displays the flag that you have allocated to a record via personal management in the menu item “Flag”.
“My unit flag”	Displays the flag a user in your unit has allocated to a record via the unit management in the menu item “Flag”.
“Original file path”	Displays the path used as the basis for a record if the record has been imported via document import from a server. This way it is possible to see where the underlying document for the record was located before being imported.
“Rec.ID”	Displays the ID (key) that is automatically allocated to a record when created.
“Record number”	Displays the consecutive number allocated to a record when it has been registered. **NOTE** A record that is registered has only one record number. The record number should not be confused with the record ID.
“Record type”	Shows whether the record is: • “Internal” – i.e. available to internal users • “Incoming” – i.e. received from external participants • “Outgoing” – i.e. sent to external participants.

Column	Description
“Sorting date”	Displays when a record was placed in one of your personal lists or your unit lists. This means the lists “My desktop”, “My inbox”, and “My archive”, the corresponding unit lists, and saved searches based on these lists. The criteria for when a record is placed in one of the mentioned lists depend on the list. For example, a record is placed in your inbox if you receive a chat on it, if you are added as a supplementary case manager, or if you generate an FOI request report. Additionally, records are placed in "My archive" when you open them. Therefore the same record can have different sorting dates in different lists. Read more about different lists and their contents. The sorting date is updated regardless of whether the record is already in a given list. This means the sorting date can be updated several times with no changes to the record, for example, if you and a colleague are chatting back and forth on it. **NOTE** In other lists, e.g. the "Archive" or "My sent records", a record’s sorting date is identical to its "Latest updated" date.
“SSN/CVR No”	Shows the SSN/CVR number a user has written in the record.
“Status”	Shows whether the record has been formally completed or is still being processed. **WARNING** A record with the "Completed" status is not necessarily write-protected.
“Suppl. case mgr.”	Shows the supplementary case managers on a record.
“Title”	Shows the title a user has given a record.
“Version No”	Shows the version number of the record.

Responsibility columns

Column	Description
“Responsible”	Displays the user or unit responsible for the record.
“Responsible unit”	Displays the unit responsible for the record. **NOTE** If the responsible participant is a user, the column displays the unit with which the user is associated.
“Responsible for unit casework”	Displays the user who is formally responsible in the recipient unit. **NOTE** If the user responsible for the record has not yet been specified, the recipient unit will be displayed as the responsible participant.

Request columns

Column	Description
“Request”	Shows whether there is a request on a record.
“Request completed”	Shows whether the record’s request has been marked as completed.
“Request created by”	Shows the user who created the request.
“Request deadline”	Shows the deadline for the request set by the creator.
“Request execution date”	Shows when a request was executed.
“Request executor”	Shows the user or unit that executes a request on a record.
“Request recipient”	Shows the user or unit set as the request recipient.
“Request reply date”	Shows when a request has been replied to (when the answer record was sent).
“Request status”	Shows whether the request is: • Sent • Accepted • Cancelled • Executed • Completed.
“Request text”	Shows the date and time for when the request was sent.
“Request type”	Shows the content of the text field of the request. **NOTE** Request types may vary between organisations as the request types are created at the organisational level.
“Internal request deadline”	Shows the request recipient’s own deadline.

Delivery columns

Column	Description
“Letter date”	Displays the letter date registered in the record. In case of scanned letters, this should indicate the actual letter date.
“Bcc”	Displays any Bcc recipients of an email.
“Cc”	Displays any copied recipients (Cc) on a record.
“Email title”	Displays the original title of an incoming email.
“Forward of record”	Displays the title of the forwarded record.
“From”	Displays the sender of the record if it was sent as an email, Digital Post, or similar. **NOTE** In case of scanned letters, it is possible to edit the record recipient so the column shows the original sender.
“Mail received date”	Displays the registered receipt time of incoming letters and emails. **NOTE** In case of scanned letters, it is possible to edit the record date. In case of emails, the date is set automatically by F2.
“Reply to record”	Displays the title of the record to which the specified record is a reply.
“Secure email”	Shows whether the user has selected “Send securely” when sending the record to external recipients.
“Sent”	Shows whether the record has been sent. The field changes automatically from “No” to “Yes” when the “Sent” function is used or when an incoming email is received. This field makes it possible to filter out unsent draft records on which sender and recipient fields are filled in.

Column	Description
	NOTE If the field is filled in manually when F2 contains scanned letters, the column also shows the recipient of the scanned letters.

Deadline columns

Column	Description
“Deadline”	Displays the formal deadline of a record.
“Deadline, unit casework”	Displays the deadline a recipient unit has set for its own management.
“My deadline”	Displays the deadline you have added to the record via personal management in the menu item “Deadline”.
“My unit deadline”	Displays the deadline a user in your unit has added to the record via unit management in the menu item “Deadline”.

Approval columns

Column	Description
“Appl: Days left”	Displays the time in days until the deadline for the approval of a record.
“Appl: Progress”	Displays a colour coded overview of the approval progress with the current approver highlighted in blue. Any previous approvers are highlighted in light blue, while future approvers are grey. The users set as approvers can be identified by their initials. Your own initials are displayed in bold. The user initials displayed in the "Location" and "Appl: Progress" columns are retrieved from the participant register. Administration of internal participants takes place in the "Units and users" dialogue. By default, the initials field in the participant register is updated/synchronised via AD (Active Directory). If this synchronisation does not occur, or if there are no initials in AD, the field will be filled with three asterisks (***). **NOTE** If there are two or more approvers at the same approval step, a number corresponding to the number of approvers at that step is shown instead of initials.
“Approval deadline”	Displays the deadline for the approval.
"Days until my next deadline"	Displays the number of days until the deadline on your next step expires.
"Final approval"	Displays the timestamp of the final approval.
“Location”	Displays the current location of an approval.
"My approval step deadline"	Displays the deadline (if any) of the next step you are approving.
“Urgent”	Shows whether an approval has been marked as urgent.

Gateway approval columns

Column	Description
”Days to gateway sorting deadline”	Shows number of days to the gateway sorting deadline.
”Gateway flag”	Shows which flag has been assigned to the approval by the gatekeeper.
”Gateway location”	Shows the current location of the approval relative to the gateway.
”Gateway sorting deadline”	Shows the gateway sorting deadline set by the gatekeeper.

Icon columns

Column	Description
"Attached file icon"	Displays the icon on any records with documents attached.
"Icon"	Shows the icon for: • Record • Email • Request • Approval • Digital Post • e-Boks • Output manager
"Message icon"	Shows the icon for: • Chat • Note • Annotation • Orientation Only one icon is displayed per record, and the more formal icon takes precedence. If the record has a chat and a note, the note icon is displayed. If the record has an annotation as well, the annotation icon is displayed.
"Reminder icon"	Shows whether there is a reminder on a record.
"Active FOI request icon"	Displays the arrow icon. The icon shows the record containing the most recent PDF-generated FOI request report. This column is intended to be shown to the left of the "Title" column, making the arrow icon point to the relevant record.

Case columns

Column	Description
“Case No”	Shows the number of the case on which a record is located. **NOTE** If the result list is showing records, this column displays the number of the case on which a record is located.
“Case folder”	Displays the case folder in which the record is placed.
“Case guide type”	Shows the type of case guide on the case.
“Case keyword”	Displays any keywords associated with a case. **NOTE** If the result list is showing records, this column displays the keywords of the case on which a record is placed.
“Case title”	Displays the title of the case.
“Previous case No.”	Indicates the previous case number. The number can originate from a different system or from a case in F2. The field can also be filled in manually.

Columns in the case view

The following columns are found when viewing cases in the result list.

Column	Description
“Case icon”	Generally displays the icon. If the case is an F2 Manager case, the icon will change to reflect this.
“Case No”	Shows the number of the case.
“Case note icon”	Displays the icon if there are any notes on the case. Hover the cursor over the icon to see a preview of the latest note.
“Progress code icon”	Displays a warning icon that reflects the deadline corresponding to the current progress code.
“Title”	Displays the title of the case.
“Action code”	Displays the case’s action codes.
“Case guide type”	Shows the type of case guide on the case.
“Completed by”	Displays the name of the user that completed the case.
“Completed date”	Displays the date and time the case were completed.
“Created by”	Displays the user that has created the case.
“Date created”	Displays the date automatically allocated to a case when it is created.
“Deadline”	Displays the formal deadline of a case.
“Disposal code”	Displays whether and when the case should be disposed.
“External access”	Shows whether external sharing of a case is: • Open • Partially open • Closed. **NOTE** This field is configurable and options may vary between organisations.

Column	Description
“File plan”	Displays the case’s file plan.
“Keywords”	Displays any keywords associated with a case.
“Locked”	Displays whether a case is included in the periodic delivery to the National Archives. **NOTE** The period shift function (ongoing delivery) to the National Archives is active only if the technical service called period shift is enabled. Therefore, it is not possible to select the value, it can only be searched for.
“Previous case No.”	Indicates the previous case number for the case. The number can originate from a different system or from a case in F2. The field can also be filled in manually.
“Progress code”	Displays the case’s progress code.
“Responsible”	Displays the user or unit responsible for the case.
“SSN/CVR No”	Shows the SSN/CVR number a user has written in the case.
“Status”	Shows whether the case has been formally completed or is still being processed.
“Suppl. case mgr.”	Shows the supplementary case managers on a case.

Columns in the documents view

The following columns are found when viewing documents in the result list.

Column	Description
“Case No”	Shows the number of the case on which the document’s associated record is located.
“Case title”	Displays the title of the case.
“Document icon”	Displays the file format of the document through an icon. For instance, a Microsoft Word icon denotes a DOCX file.
“External ID”	Displays the external ID of the document. This may be used when referring to documents in a case guide.
“ID”	Displays the ID (key) that is automatically allocated to a document when created.
“Modified”	Displays the date and time when the document was last edited.
“Modified by”	Displays the name of the user who last edited the document.
“Most recently accessed by me”	Displays the date and time when you last accessed the document.
“My latest action”	Displays the last action you made in relation to the document, e.g. “Opened” it or “Updated” it.
“Rec.ID”	Displays the ID (key) that is automatically allocated to a record when created.
“Record locked”	Displays a padlock if the document is locked, i.e. write-protected.
“Record title”	Shows the title of the record to which the document is attached.
“Record type”	Shows whether the document’s associated record is: • “Internal” – i.e. available to internal users • “Incoming” – i.e. received from external participants • “Outgoing” – i.e. sent to external participants.
“Size(KB)”	Displays the size of the document.

Column	Description
“Title”	Shows the document’s title.
“Version”	Displays the current version of the document.

Columns in the request view

The following columns are found when viewing requests in the result list.

Column	Description
“Case No”	Shows the number of the case on which a record with a request is located.
“Case title”	Displays the title of the case.
“Current request status”	Displays whether the request is: • Sent • Accepted • Cancelled • Executed • Finalised.
“Deadline”	Displays the deadline for the request set by the creator.
“Executor”	Displays the user or unit that executes a request on a record.
“Icon”	Displays the request icon. Read more about icons and their variations in the Request icons section.
“ID”	Displays the ID of the request.
“Internal request deadline”	Displays the request recipient’s own deadline.
“Rec.ID”	Displays the ID (key) that is automatically allocated to a record when created.
“Recipient”	Displays the user or unit set as the request recipient.
“Record recipients”	Displays any recipients who received the request as an email.
“Record sender”	Displays the sender if the request was sent as an email.
“Record title”	Displays the current title of the record.
“Request created”	Displays the date and time of the request’s creation.

Column	Description
“Request created by”	Displays the user who created the request.
“Request sender”	Displays the name of the user who sent the request.
“Request sent”	Displays the date and time the request was sent.
“Request type”	Displays the type or types of the request. **NOTE** Request types may vary between organisations as the request types are created at the organisational level.
“Unique record title”	Displays the current title of the record and its ID.

Set up the result list columns

The result list columns are adjustable. You can adjust the width and placement of the columns and select which columns to display in each list. These options are described below. You can also save your adjustments and apply them to other lists. This is described in Set up views in F2.

Place and sort columns

Reorder the columns by dragging and dropping them in their desired location.

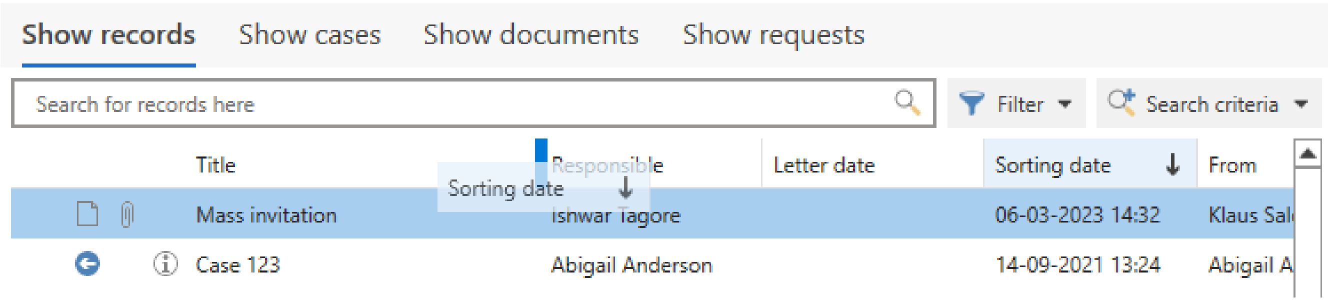


Figure 47. Moving columns in the result list

Adjust the width of columns by dragging one of its edges with the cursor.

An overview of columns and their contents can be found in Columns.

TIP	The four leftmost columns in all result lists contain icons providing visual information about the given list element. cBrain recommends never reordering these columns.

To sort the result list, click on a column title. The list will be sorted alphanumerically according to the column’s values (0-9 and a-z or 9-0 and z-a). If the result list is sorted by title, for instance, the results appear in alphabetical order. Click again to sort the list in descending alphabetical order. The same principle applies to columns with numerical values. Click on e.g. the "Case number" column to sort it in ascending order and click again to reverse the order.

You can further sort the result list by holding the **Shift** key and clicking a second column. For instance, you can sort a list by "Responsible" participant (1) first and then "Title" (2). This means the result list groups records by responsibility and sorts each group alphabetically by their titles.

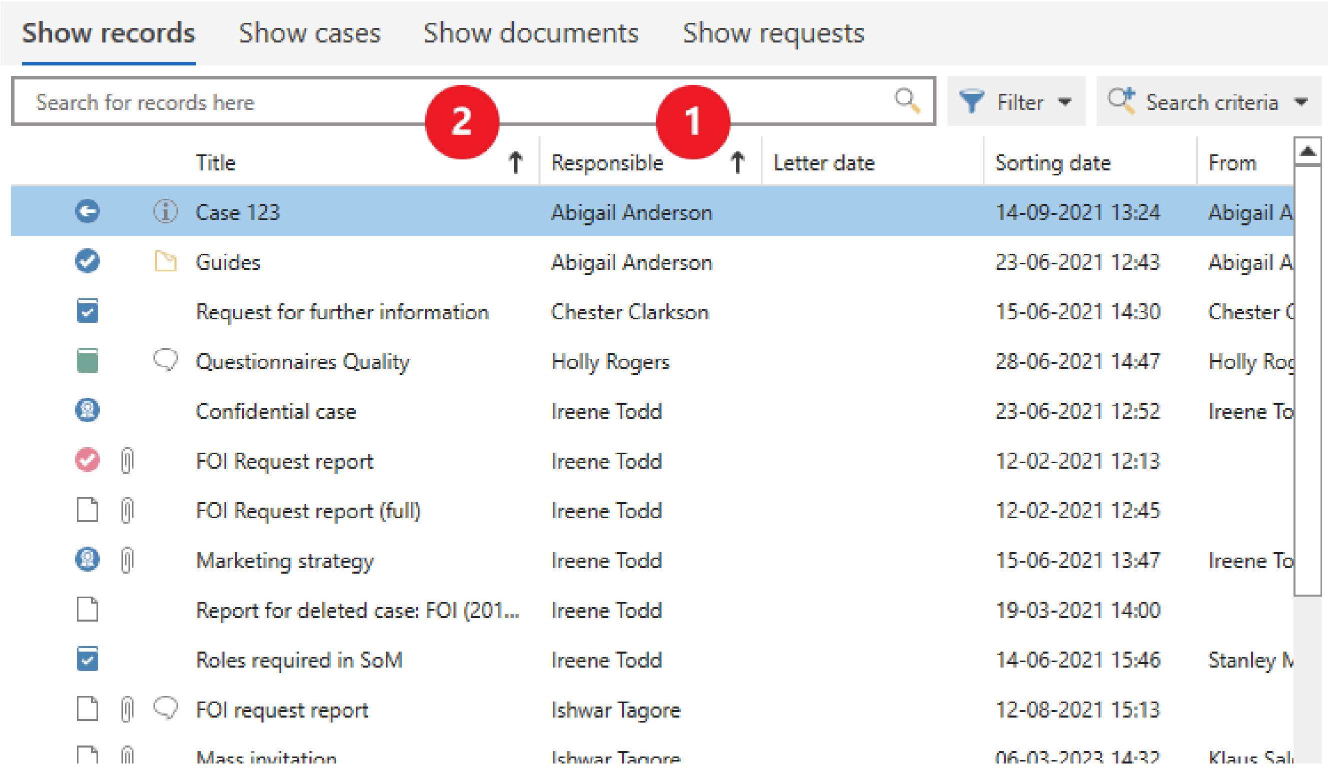


Figure 48. Sort the result list by one or two columns

Select columns for the result list

You can select which columns to display in a given result list. Right-click on any column, and then click on **Columns** in the context menu. The "Select columns" dialogue opens. The number of columns available varies depending on your installation's add-on modules.

NOTE The result list view - whether it is showing records, cases, documents, or requests - determines which columns can be selected.

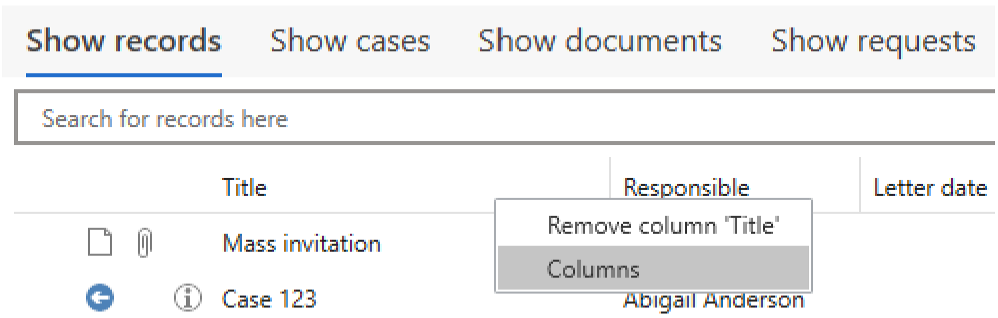


Figure 49. Open the column selector

The figure below shows a section of the column selector. You can read about all columns and their contents here.

It is possible to search for a column title by using the search field. By default, all column titles are shown in the dialogue. Tick the box **Show only selected columns** to display only the columns currently selected for the result list.

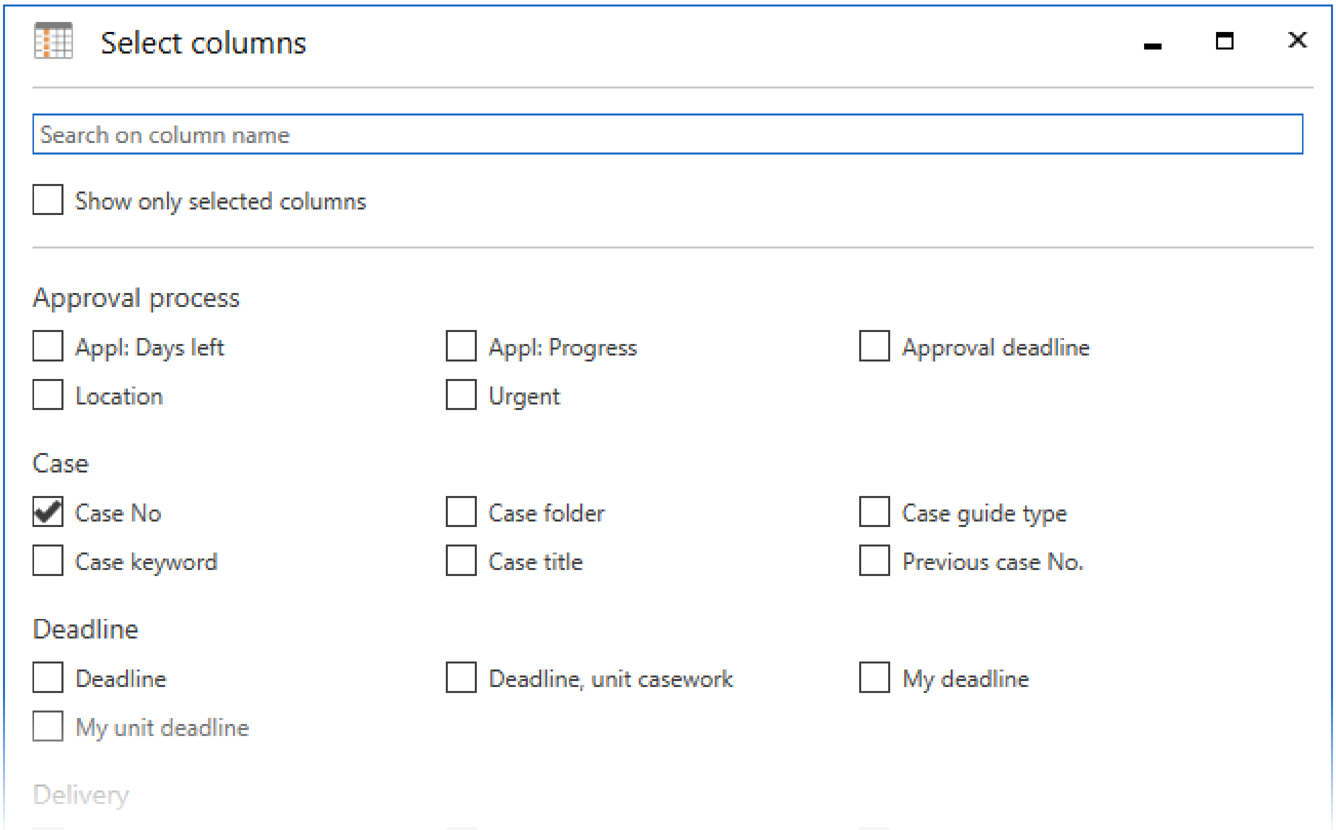


Figure 50. The column selector

Select or deselect a column by ticking or unticking the box next to its title. The selection only applies to the current list.

TIP If all columns are removed by mistake, right-click on the blank column bar to access the "Select columns" dialogue.

Save a search

It is possible to save an advanced search so it can be reused. Saved searches are lists and thus dynamic. This means that when new records or cases fit a list's search criteria, they are automatically added when you open the list. An open list can be updated by pressing the **F5** key.

If you have the the "Search administrator" privilege, you can make your saved search available to a unit or as a fixed search for the entire organisation.

Personal searches

All F2 users can save their personal searches. Personal saved searches can, for example, be used to create lists of cases, keywords, or flags that you often use or need to keep track of.

Save a personal search

Create an advanced search to save it as a personal search. Click on the **Save search** button that appears when advanced search is enabled.

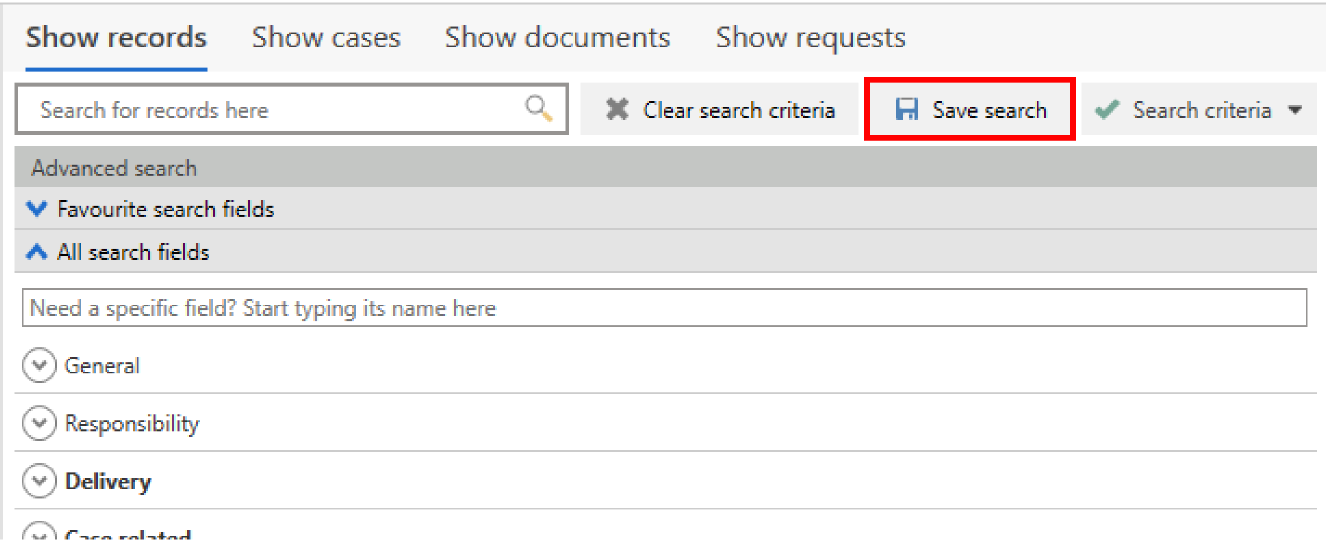


Figure 51. Save search

The "Save new personal search" dialogue opens. Give the search a title. Click **OK** to save your search as a list in the "Personal searches" node in the main window.

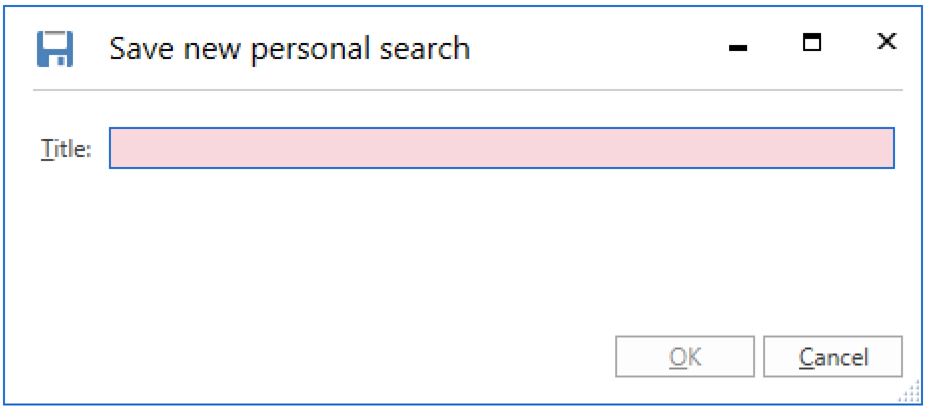


Figure 52. To save a search, enter a title

View personal searches

Personal searches are displayed under the “Personal searches” node in the list view. The icon to the left of a personal search indicates which list the search is based on, which may be standard searches, unit lists, and lists from the “Misc.” node.

Read more about F2’s lists and their icons.

You can always check the search criteria of a saved list.

Example: In the figure below, the user Hannah Hendricks has saved a personal search and added it to her favourites. She hovers the cursor over the list on the left in the main window to view its search criteria. The search criteria are “FLAG (“Personal: Urgent”)” and “RESPONSIBLE(“Me”)”. This means that the list displays all records to which Hannah has added the "Urgent" flag and for which she is responsible.

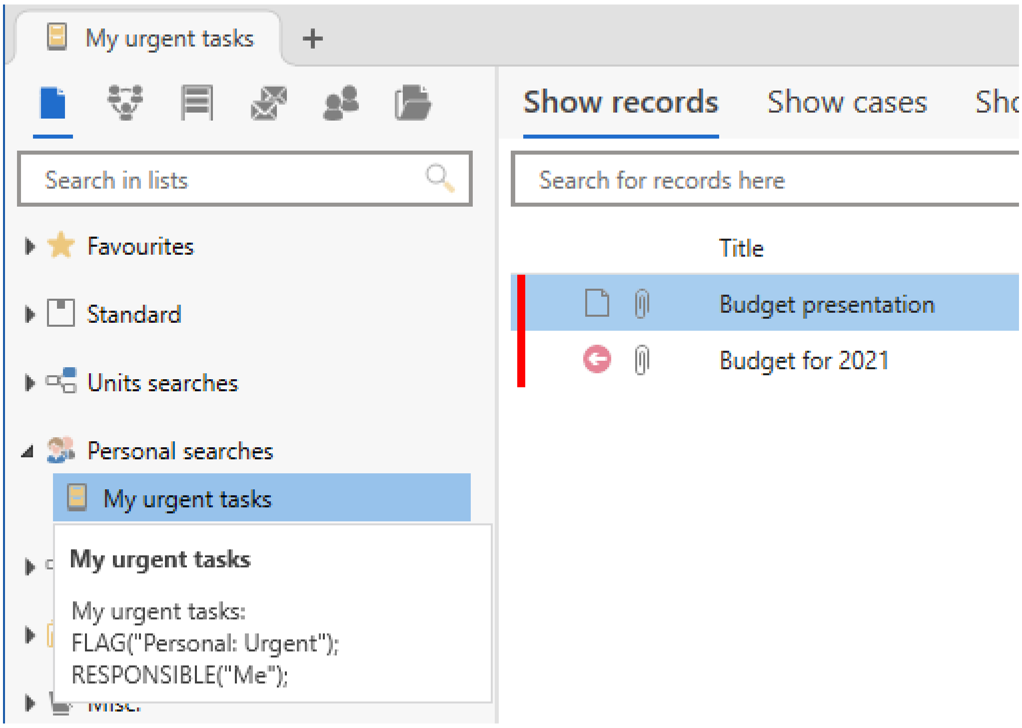


Figure 53. A saved search as a list

Delete or rename a personal search

A personal search can always be deleted or renamed. Right-click on a personal search to open the context menu shown below. The figure below shows the context menu for a personal search, “My urgent tasks”.

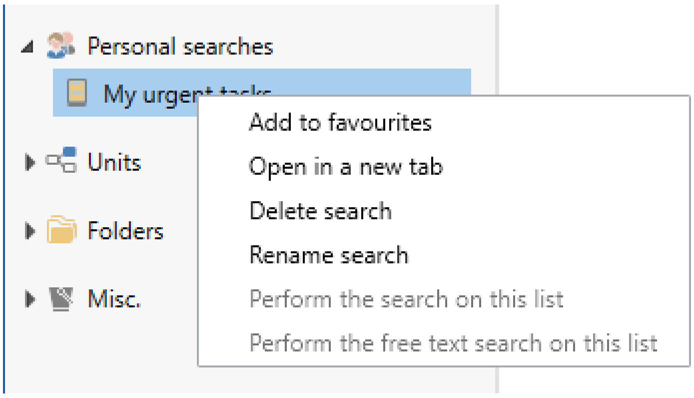


Figure 54. Delete or rename a personal search

Retain search field visibility in lists

The search lists can remember if the search fields were displayed or hidden the last time a list was shown. When a list is chosen on the left side of the main window, the search fields will appear in the same way as when the list was last viewed.

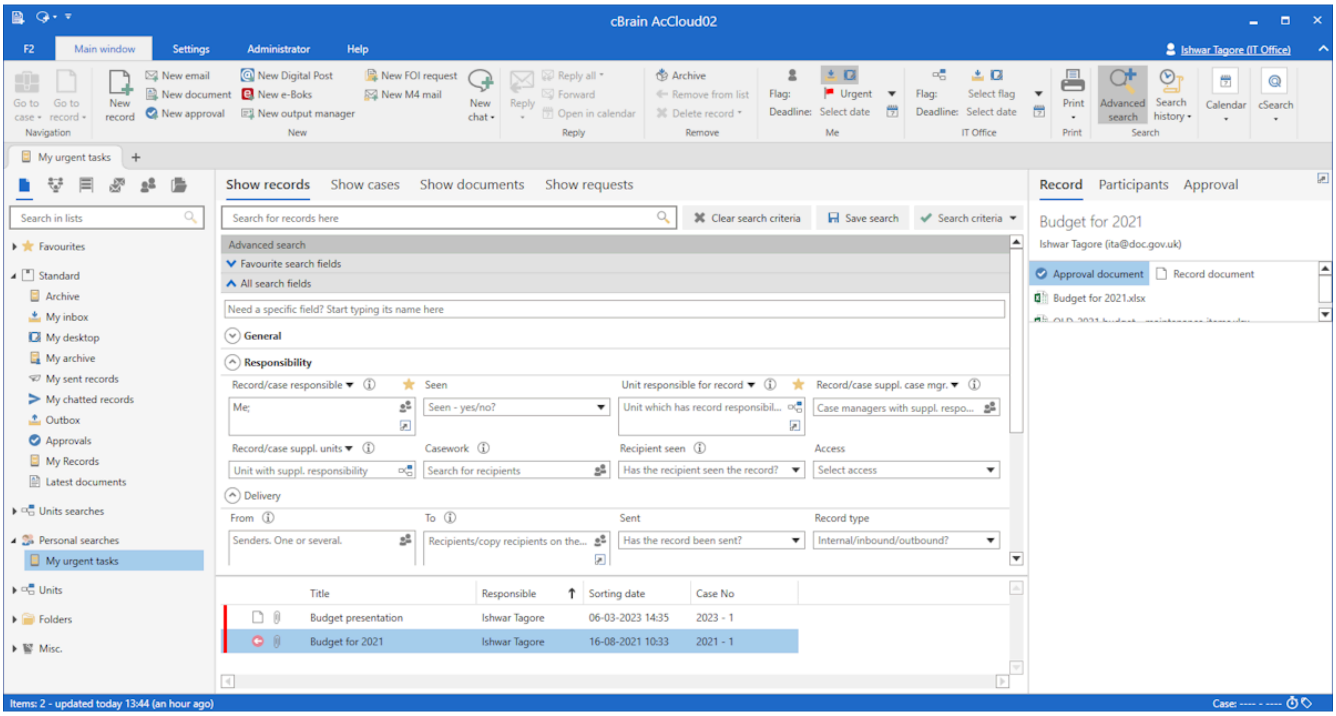


Figure 55. Search fields displayed in the result list

It is always possible to toggle the search fields by clicking the **Advanced search** menu item in the main window ribbon.

The option to retain search fields is found on the "Settings" tab. Click the **Setup** menu item and then select the "Main window" tab in the dialogue. Tick or untick the box "Always hide my search fields when I change lists" to select the preferred search field display option.

Read more about personal settings and setup.

Naming searches performed in unit lists

When you perform a search in a unit's inbox, desktop, or archive, F2 does not automatically show from which unit's list the search was performed. It is up to you to give the search a title that takes the name of the unit into account.

The reason for this is that users can be associated with multiple units, and F2 does not automatically show the name of the unit list in which the search was performed. This applies to both your personal searches and to fixed searches for units created by a user with the "Search administrator" privilege.

Example:

Holly Rogers has several job roles and thus access to the inboxes, desktops, and archives of several units, including the HR unit. Holly now performs a search in HR's inbox using the search criterion record manager: "Holly Rogers".

Holly wants to save her search. Since F2 does not show which unit list Holly performed the search in, Holly should include the name of the unit in the search's title. A title such as "Records in the unit's inbox with me as manager" is too general and does not show in which unit the search is performed. Instead, Holly saves the search and names it "Records in HR's inbox with me as manager".

NOTE Personal searches (e.g. searches in "My inbox", "My desktop", and "Archive") correspond to the user's current unit. This applies to unit flags, deadlines, read/unread, etc.

Search history

You can view your most recent searches by clicking on the **Search history** menu item in the main window tab.

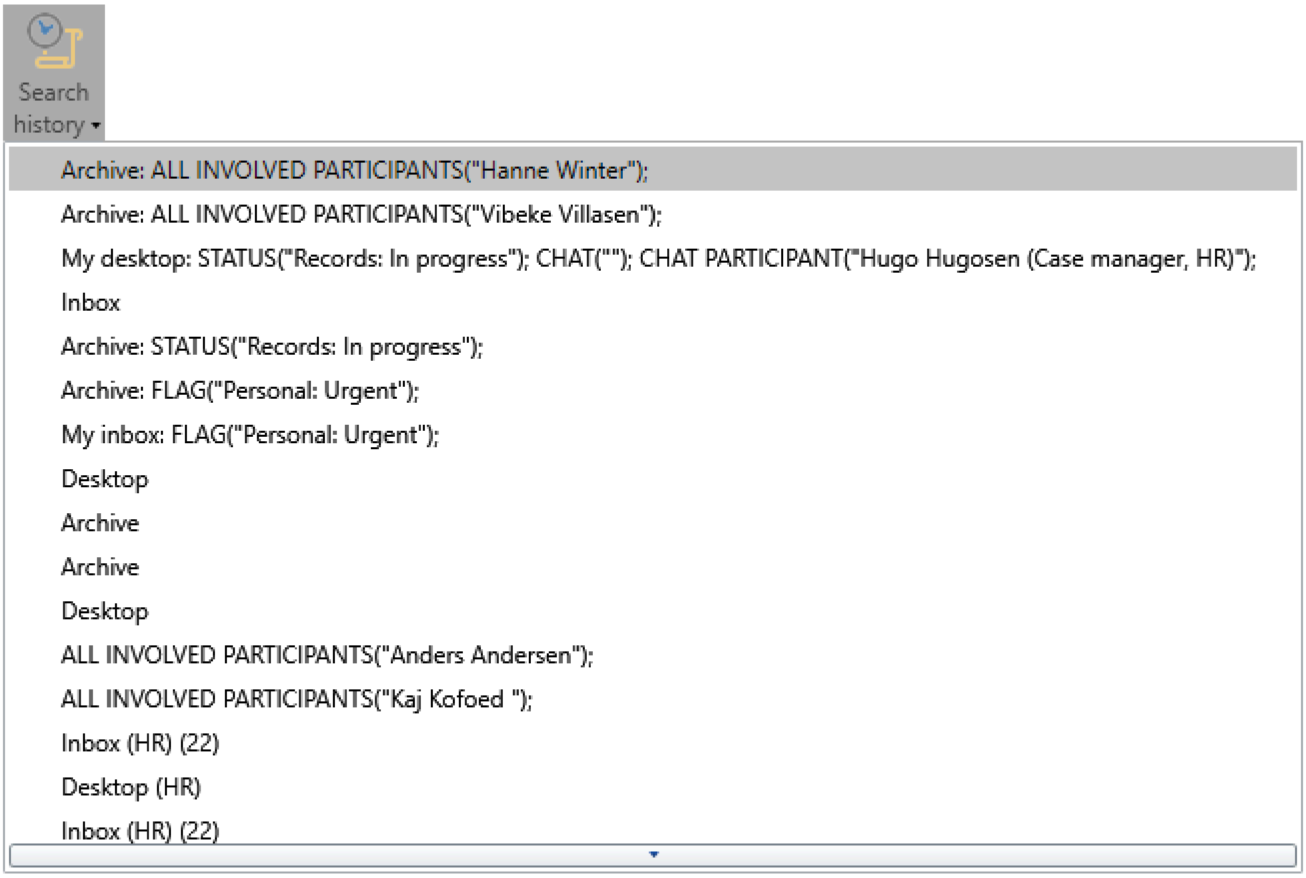


Figure 56. The “Search history” menu item