# F2 Manager 2

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# F2 Manager 2

#### IMPORTANT

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

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

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

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

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

# F2 Manager 2 options

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



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



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



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



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

# Set up F2 Manager 2

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

# Setup through "Settings"

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



Figure 1. F2 Manager 2 setup

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

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

# Log in on F2 Manager 2

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

F2 Login
User name
Password
Login

Figure 2. Log in to F2 Manager 2

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

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

# Synchronise material F2 Desktop

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

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

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

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

## Synchronise cases and records

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

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

₹			2023	- 12: SoM - Speeches - Environmenta	al concerns regarding harbo	our expansion			_ = ×
F2	Case	Participants Help						S Myles McDougal	I (Ministry)
Go to mai window	n Go to reco on this cas	rd Edit	New email New document record New approval	<ul> <li>New Digital Post R New output manager</li> <li>New e-Boks</li> <li>New M4 mail</li> </ul>	New Add Add F2 Add case guide	e Set case to 'Complete'	Hide folder structure       Image: Structure structure       Refresh record list       Preview:       Right alignme	Auto Edit grouping	① Q Other cSearch
N	avigation	Edit		New		Status	View		

Figure 3. Add case to F2 Manager 2

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

▼	2023 - 12: SoM - Spe	eches - Environmental c	oncerns regarding harbour expar	ision 🗕 🗉 🗙
F2 Case Participants F2 Manager	Help			💄 Stephen Murray (Secretariat of the management) 🛛 🛆 🔨
Go to main Go to record window on this case • Navigation Edit Ad hoc Edit Ad hoc meetings •	Publish QQ cSearch tings cSearch			
Hide fields				
- iPad synchronisation	Date and category		Participants	
Activated:	All-day:		Participants:	0 <sup>0</sup>
From:	From:	7		
To:	To:	2	External:	01 01
New elements included: Automatically	Category:	$\nabla$	Stakeholders:	0 <sup>0</sup>
- Ratings	Additional information			
Can only be submitted until: hours before the start	Title: SoM - Speeches - Env	vironmental concerns regarding I	harbour expansion	
Not shared until: hours before the start	Description:			R
Synchronisation list Update				automatically placed here)
Title	ID No To be rated Disallo	w export		
Press release	891			
Re: Press release	892			
Speech text	887			
Out Chow falder structure. Petrach record list				
Title	ID No. Latter date	From	Ta Parnan	ribla
nue	10 NO Letter date	rioin	io Nespon	sible
Items: 3 - updated today 08:27 (0 minutes ago)				Case: 2023 - 12 💇 🏷 📗

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

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



Figure 5. Switch meeting to edit mode

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

The relevant metadata fields are the following:

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

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

## iPad synchronisation

iPad synchronisation								
Activated:	$\checkmark$							
From:	10/09/2019	7						
To:	10/10/2019	7						
New elements included:	Automatically	▼						

Figure 6. Synchronise to iPad

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

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

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

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

## **Date and category**

Figure 7. Date and category

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

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

## **Participants**

Participants		
Participants:	Select persons, units, teams or distribution lists	0] 0]
		J.
External:	Anders Andersen (anders@andersen.com);	್ರೆ
Stakeholders:	Select persons, units, teams or distribution lists	<u></u>

Figure 8. Participants

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

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

## Participants

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

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

## External

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

## Stakeholders

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

## **Additional information**

Additional information						
Title:	CAS					
Description:		] 🔺				

Figure 9. Additional information

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

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

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

11.10 Mon 29 Apr		000	<b>奈</b> 50 % ■)
Search for meeting	4	Interview strategy Date: 30 April 2024 12:30 - 15:00 <sup>K</sup> y Full screen 🛛 🗄 Display all agenda items	Agenda items: 2
M T W T 29 30 1 2 Tomorrow	F S S 3 4 5 3 meetings	Participants: Siún Moynihan, Penelope Poole, Maisy Moore, Myles McDou Description: We're going to prepare for the upcoming interview which w delays and related inquiries	ıgall 'ill dive into old grant
08:00-09:30	4 agenda items	Reply to parliament inquiry	1 0 🗸
Event permit applicati 10:00-12:00	<b>ions</b> 2 agenda items	DRAFT - Reply to parliament inquiry	2 🕅 🗸
Interview strategy 12:30-15:00	2 agenda items		
😴 Meetings		Approvals Copy recipient	○ Chats

Figure 10. The description as shown on F2 Manager 2

## The synchronisation list and other records on the case

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

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

added to a case, all case records are automatically added to the synchronisation list.

Synchronisation list Update							
Title	ID No To be	rated Disallow	export				
FOI request on measures taken towards the protection	n 417 [		]				
Re: Renewal of harbor	418		]				
Proposal regarding new harbor	448		]				
Drag elements here from the list below							
Title	D No	Letter date	From	То	Responsible		
Proposal regarding new harbor	147	10/05/2017 10:			Dieter Davidsen		
Drag elements here from the list above							

Figure 11. Records in the synchronisation list

### Automatic vs manual inclusion

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

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

iPad synchronisation		
Activated:	$\checkmark$	
From:	10/09/2019	7
To:	10/10/2019	2
New elements included:	Automatically	▼

Figure 12. Include new elements

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

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

## Select items for synchronisation

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

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

Synchroni	sation	list <u>Update</u>						
		Title	ID No To	be rated	Disallow exp	ort		
1	<b>†</b>	FOI request on measures taken towards the protection	n 417					
1	Υ.	Re: Renewal of harbor	418					
1	T.	Proposal regarding new harbor	448					
	Drag elements here from the list below							
Other case	e recoi	rds Show folder structure Refresh record list					(New case recor	rds are automatically placed here)
	Ti	tle I	D No	Letter d	ate Fro	n	То	Responsible
÷	Pi	roposal regarding new harbor 4	147	10/05/2	017 10:			Dieter Davidsen
Drag elements here from the list above								
4								•

Figure 13. Records in the synchronisation list

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

## Structuring the agenda items (records)

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

Synchro	nisation	list Update						
		Title	ID No	To be rated	Disallow export			
1	T.	FOI request on measures taken towards the protection	417					
1	1	Re: Renewal of harbor	418					
<b>↓</b>	<b>•</b>	Proposal regarding new harbor	448					
01		<ul> <li>Show folder structure Defeats around list</li> </ul>	Drag e	elements ł	nere from th	e list below	41	
Other c	ase reco	rds Show folder structure Refresh record list					(New case record	is are automatically placed here)
	T	itle ID	) No	Letter o	late From	То		Responsible
Đ	P	roposal regarding new harbor 44	47	10/05/2	2017 10:			Dieter Davidsen
			Drag e	elements ł	nere from th	e list above		٩

Figure 14. Structure the agenda items

## Create multiple ad hoc meetings for the same case

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

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



Figure 15. Create and select other ad hoc meetings

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

# The F2 Manager 2 app

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

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



Figure 16. Structure of the F2 Manager 2 app

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

1.27 Fri 10 May			<b>?</b> 85 % <b>(</b> )			
Record document						
ĸ <sub>↘</sub> Split screen 🖉 Annotate						
	Ar	pendix				
To: Ian Teller (iatel@digi.co.) From: Myles McDougall (mmd@ Title: Question regarding data Sent: 26-08-2022 08:29	ık) ⊉doc.gov.uk) security					
Dear lan						
l would like to look into the l	preservation of data wh	en sending emails between autho	rities on the same F2.			
Best regards						
Myles						
👽 Meetings	Approvals	Copy recipient				
Figure 17. Full screen display						

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

# **Push notifications**

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

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

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



Figure 18. Push notifications from F2 Manager 2

# Meetings in F2 Manager 2

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

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



Figure 19. Overview of meetings

In the left side you can see the meetings (1). You can search for meetings using the calendar and search field above the calendar (2). When you tap on a day, meetings for that day are displayed at the top. Your subsequent meetings in the same week are shown below in chronological order. When you tap on a meeting in the list, its agenda is displayed in a preview on the right side (3). Above the preview are functions for reading the meeting (4). Above the functions are the metadata of the selected meeting in the form of title, meeting time, and the number of agenda items (5).

# **Types of meetings**

F2 supports two different types of meetings: ad hoc meetings, and meetings created through the F2 Meetings module (documentation available in Danish). Both types of meetings appear on F2

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

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

# The meetings

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

11.10 Mon	29 Apr				
Q Sea	arch for m	eeting			
<	30 /	Apr 20	24		>
M -	T W	T 2	F 3	S 4	S 5
Tomorro	W			3 mee	tings
<b>Month</b> 08:00-0	Monthly status, May 2024 08:00-09:30 4 agenda items				tems
Event permit applications 10:00-12:00 2 agenda items					
Interview strategy12:30-15:002 agenda items					

Figure 20. The meetings list

# Search for a meeting

To find a specific meeting, select the day of the meeting in the calendar. In the app "Settings" you can choose whether meetings should only be displayed for the selected day or for one week at a time. Use the arrows to switch between weeks. In the search field above the meeting list, you can search for meetings on the day you have selected or for future meetings after today's date. Search

by meeting title, participants' names, agenda item titles, and record IDs, as well as attached document titles.



Figure 21. Search for meetings

## Navigate to next meeting

If you have selected a date in the meeting calendar with no meetings, the **Go to next meeting** button will appear. Press the button to go to your next meeting.



# **Meeting ribbon functions**

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



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

The functions are as follows:

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

# Read and annotate agenda

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

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

11.13 Mon 29 Apr	000	
Search for meeting	Interview strategy Date: 30 April 2024 12:30 - 15:00 <sup>K</sup> a Full screen 🛛 🖶 Display all agenda items	Agenda items: 2
M         T         W         T         F         S         S           29         30         1         2         3         4         5           Tomorrow         3         meetings	Participants: Siún Moynihan, Penelope Poole, Maisy Moore, Myles McDo Description: We're going to prepare for the upcoming interview which delays and related inquiries	ougall will dive into old grant
Monthly status, May 2024 08:00-09:30 4 agenda items	Reply to parliament inquiry	1 0 🗸
Event permit applications 10:00-12:00 2 agenda items	DRAFT - Reply to parliament inquiry	20 ^
Interview strategy 12:30-15:00 2 agenda items	Record ID: 755	Open agenda item
🐯 Meetings	Approvals Copy recipient	

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

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



Figure 25. Expand agenda

## Read through agenda items and documents

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

DRAFT - Reply	to parliament inquiry	2 0 🔨
上 Reply	Approval document	
Record ID: 755	5	Open agenda item

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

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

11.25 Mon 29 Apr	•••• <del>?</del> 49		
Interview strategy	Reply		
Agenda	ド <sub>コ</sub> Full screen 🥒 Annotate	G New chat	
Reply to parliament inquiry 1 $$ 1	Appendix		
DRAFT - Reply to parliament inqui 2 $\emptyset$			
入 Reply		Case no: 2022 - 2	
Approval document		Date: 19-01-2022	
	To Donald Smith Thank you for your inquiry. My reply is as follows: Yadda, yadda, yadda. Sincerely Minister Maisy Moore \$signature:signature_mmo\$		
💱 Meetings	Approvals Copy recipient	$\bigcirc$ Chats	

Figure 27. The agenda view

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

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

### The agenda for meetings created with F2 Meetings

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

11.23 Mon 29 Apr	000	🗢 49 % 🔳 )
Q Search for meeting	Monthly status, May 2024 Date: 30 April 2024 08:00 - 09:30	Agenda items: 4
	rull screen 🛛 📄 Display all agenda items	
M T W T F S S 29 30 1 2 3 4 5	Participants: Siún Moynihan, Sebastian May, Penelope Poole, Maisy Moore	
Tomorrow 3 meetings	1. Follow-up from April	00 🗸
Monthly status, May 202408:00-09:304 agenda items	2. News from the Ministry	4 0 🔨
Event permit applications 10:00-12:00 2 agenda items	Record document	
Interview strategy	E Record document	
	Record ID: 954	Open agenda item
	3. News from the SoM	0 🕅 🗸
	4. Summary and action plan	00 🗸
👽 Meetings	<ul><li>Approvals</li><li>Copy recipient</li></ul>	$\bigcirc$ Chats

Figure 28. Access records attached to an agenda item

## Annotate agenda items and documents

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



Figure 29. Start annotating from the ribbon

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

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

000	<b>奈</b> 96 % <b>₫</b>
	A: 🗡 Gem
ival "Under Buen"	
ing	
22 01 2024	
Rasmus	
	<b>interview of the second secon</b>

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

Figure 30. A document in annotation mode

Tap Cancel in the upper toolbar at the top to undo your recent annotations and return to the

50

You can also make text annotations in the document. Press the **text box icon**  $\triangle$  in the toolbar to open a text box in the document.

Tap the text box and write your text using the keyboard. Change the size of the text box by dragging the small blue dot on the right side. Move the text box by pressing it while moving its position in the document.

agenda view.



Tap the round menu icon in the top right corner of the text box to open a menu where you can choose font type, size, and colour, as well as background colour. From the menu you can remove the text box by tapping **Remove**.

14.55 man. 26. feb.				4	م 96 % 🔳
Fortryd				A /	Gem
		<b>•</b>			
	Her skriver du din tekst	Fiern	m		
		Skrifttype			
		экпітуре			
	Kære \$mergeparty_name\$	Skriftstørrelse	>		
	Mange tak for dit spørgsmål. He	Tekstfarve	>		
		Baggrundsfarve	>		
	Lorem ipsum dolor sit amet, con	isceletai aaipisein	s circ. or semper id	massa	
	Figur	e 32. Text box r	nenu		

Tap the **pencil icon** in the toolbar to display the toolbox with the other annotation tools.

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

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

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



Figure 33. A pencil icon indicates annotations

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

### Accessing annotated documents from F2 Desktop

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

= 2021 - 3: F2 Manager archive for Maisy Moore 💶 🔍 🖉					
F2 Case Participants Help	Maisy Moore (Ministry)				
Go to main Go to record window on this case • Navigation Edit	Image: Series of the series				
Title: F2 Manager archive for Maisy M	Acore				
Responsible:	Status: In progress				
Show more fields					
F2 Manager archive for Maisy Moore 2021 - 3	Record Participants				
	Title Letter date Sorting date 🤟 From 🔤				
	Sorting date: Older     Annotations for 2018 - 3 - Preparation of Environmental Report - Ve				
	🗋 🕅 Annotations for 2021 - 12 - SoM 31-05-2021 16:39				
	🗋 🕅 Annotations for 2018 - 3 - Prepar 12-02-2021 12:02				
	Annotations for 2021 - 2 - SoM 20-01-2021 1603 This record is created to keep user specific annotated documents relating to meeting (NO): Preparation of Environmental Report (2018 - 3), agenda item: Versions of FOI request reports.				
Items: 3 - updated today 07:30 (a minute ago)	Case: 2021 - 3 Ŏ  l				

Figure 34. Annotated documents on the same record

By default, only the user who made the annotations can access the "F2 Manager archive for [Username]" case and its annotated documents, because their access level is automatically set to "Involved" and case access is restricted to the user. The annotations are thereby kept private and cannot be found by others. As with other records in F2 it is still possible to share the records with other users, e.g. by changing the access level or by chatting the record to another user.

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

### **Toggle annotation visibility**

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



Figure 35. Hide annotations in the document

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

# Chat from an agenda item

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

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

## Create a new chat on an agenda item

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



🧪 Annotate



#### Figure 36. Create a chat on an agenda item

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

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

11.42 Fri 10 May		• • •		<b>२</b> 81 % 🔳
Follow-up to interview	Example o	of grant reply		
Agenda	Full sc الد	creen 🖉 Annotate		🖓 New chat
Interview strategy	Cancel	Chat participants	ОК	
Example of grant reply	Correl for chat particip		_	
👌 Grant application reply	Favourites	ants		
	Myles McDo Case manager	<b>ugall</b> ; Ministry	×	
	SM Sadie Maxwe Case manager	ell , Secretariat of the Management	×	
🐯 Meetings	Approva	als Copy recipi	ient	○ Chats

Figure 37. Add chat participants

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

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



Figure 38. The chat window

The chat is also available on the chats list.

## View chats on an agenda item

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

12.42 Fri 10 May		••••		
K Follow-up to interview	,	Example of grant reply		
Agenda		$^{\rm K}{}_{\rm M}$ Full screen		🖓 New chat
Interview strategy	2 ()	Agenda item		Chat
Example of grant reply	2 🗘 1 🕅	Myles McDougall, Maisy N	Aoore	12:42
<b>占</b> Grant application reply		Myles McDougall: However, I have ma	ade annotations on any areas that	t we should be careful discussin
		MISMIM Maisy Moore, Sadie Maxw	well, Stephen Murray	11:44
		Maisy Moore: Please hold off on reworki	ing the reply template before the in	iterview has been conducted
🐯 Meetings		Approvals	Copy recipient	○ Chats

Figure 39. Chats on an agenda item

Tap a chat to open the chat window.

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



Figure 40. Chat icon on an agenda item

## View chats from the agenda

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

#### 13.26 Mon 29 Apr

13.26	Mon 29 Apr						<b>२</b> 22	%
Q <	Search for meeting 30 Apr 20	24 >	Interview stu Date: 30 Apri	rategy   2024 12:30 - 15:00   E Display all agenda i	items		Agenda item:	s: 2
M 29 Ton	T W T 30 1 2	F S 3 4 3 meeti	S Participants: Description:	Siún Moynihan, Penelope P We're going to prepare for delays and related inquirie:	Poole, Maisy the upcomir s	Moore, Myles McDougall ng interview which will di	ive into old grant	
<b>Mc</b> 08	onthly status, May :00-09:30	2024 4 agenda ite	Reply to parlie	ament inquiry			1 0	~
Ev 10 In	ent permit applica :00-12:00 terview strategy	<b>itions</b> 2 agenda ite	ems	y to parliament inquiry	nent	🕽 Chat with MM, MM,	1 🗘 2 🕅 .	^
12	:30-15:00	2 agenda ite	Record ID: 75	55			Open agenda item	,
	😵 Meetings		Approvals	. <b>()</b> (	Copy recipier	nt		
			Figure 11	Chata an an aga	nda itar	22		

Figure 41. Chats on an agenda item

# **Approvals in F2 Manager 2**

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

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



Figure 42. Overview of approvals

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

NOTE

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

# The approvals list

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

Approvals					
Search for approval					
Urgent	1 approval				
Budget proposition for p	public polit 1 0				
Tomorrow	1 approval				
Notes for the Ministry p Tomorrow, 00:00	resentation 2 0				
👌 Notes					
Record attachment, II	D No 756:				
no deadline	3 approvals				
IT infrastructure budget	t 1 0				
Public forum format and	d outline 0 0				
Ministry templates	O 0				

Figure 43. The approvals list

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

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

## **Search for approvals**

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

14.15 Fri 10 May					
Approvals					
🔍 Publi					
Urgent	1 approval				
Budget proposition for p	public polit 1 0				
no deadline	1 approval				
Public forum format and	1 outline 0 0				

Figure 44. Search for approvals

## **Approvals ribbon functions**

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



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

The functions are as follows:

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

# **Read and annotate approval**

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

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

## Read through approvals and their documents

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

14.54 Mon 29 Apr	000	<b>रू</b> 14 % 💽
Approvals	Notes	😋 Return 🕑 Approve
Urgent 1 approval		
Budget proposition for public polit 1 0 Tomorrow 1 approval	Background: - Inquiry from Parliament - New bill recently passed	
Notes for the Ministry presentation Tomorrow, 00:00 2 🕅	<ul> <li>Upcoming interview regarding the inquiry</li> <li>Topic:         <ul> <li>Data security concerns as a consequence, but not immediate focus, of new I</li> <li>For discussion:</li> </ul> </li> </ul>	pills
🖉 Notes	Our states on this particular bill     Our learnings to implement in future bills	
Record attachment, ID No 756:	<ul> <li>How the rest of the authority can back us in this work</li> </ul>	
no deadline 3 approvals		
IT infrastructure budget 1 $$ 0		
Public forum format and outline $_{0\ \emptyset}$		
Ministry templates 0 Ø		
Set Meetings	Approvals     Copy recipient	○ Chats

Figure 46. Read approval

Tap an attached document to preview it on the right.

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

### The approval document

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

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

## **Annotate documents**

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



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

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



Figure 48. A document in annotation mode

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

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

You can also make text annotations in the document. Press the **text box icon**  $\triangle$  in the toolbar to open a text box in the document.

Tap the text box and write your text using the keyboard. Change the size of the text box by dragging the small blue dot on the right side. Move the text box by pressing it while moving its position in the document.



Tap the round menu icon in the top right corner of the text box to open a menu where you can choose font type, size, and colour, as well as background colour. From the menu you can remove the text box by tapping **Remove**.

14.55 man. 26. feb.				<b>?</b> 96	% 🔳
Fortryd				A / (	em
		•			
	Her skriver du din tekst	Fjern	<b>逊</b>		
		Skrifttype	>		
	Kære \$mergeparty_name\$	Skriftstørrelse	>		
	Mange tak for dit spørgsmål. He	Tekstfarve	>		
	Lavam incum dalar ait amat an	Baggrundsfarve	>		
	Lorem ipsum dolor sit amet, con		g circ. or semper id	massa	
	Figur	e 50. lext box r	nenu		

Tap the **pencil icon** in the toolbar to display the toolbox with the other annotation tools.

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

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

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

	Approval document
	Budget proposition.xlsx
	Budget proposition (annotated by MM).pdf
Figure 51.	The annotated document as a PDF file in F2 Deskt

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

no deadline	3 approvals
IT infrastructure budget	
	1 0
Budget spending report	Ø
Public forum format and	outline
	0 0

Figure 52. A pencil icon indicates annotations in F2 Manager 2

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

### Toggle annotation visibility

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

$^{\ltimes}$ 」 Full screen	🖉 Annotate	••• More	🕞 New chat	😋 Return	Approve
	Ap	) 🕘 Hide a	nnotations		
	Figure 5	53. Hide anr	notations		

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

# **Process approvals**

You can process approvals on F2 Manager 2 by returning them or granting approval. In addition you can resume an approval if it has been returned to your step from a subsequent approver.



Figure 54. Approval processing options

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

### **Return approval**

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

13.06 Mon 29 Apr	000	<b>奈</b> 29 % 💽 '
Approvals	Budget proposition	
Search for approval	Full screen 🖉 Annotate	🕒 Return 🕑 Approve
Urgent 1 ap	Cancel Return approval OK	
Budget proposition for public	Return to: Step 0: Responsible	Created da File plan ######### ##########
🔀 Budget proposition	Resume with: Resume with: Step 0: Responsible	*****
no deadline 3 ap;	Comment	######## #########
IT infrastructure budget		######### ######### ########## ########
Public forum format and outlir		********** #******
Ministry templates		######## ######### ##########
		######### #########
		********** ********* *******
💱 Meetings	Approvals Copy recipient	

Figure 55. Return approval

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

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

Read more about returning approvals.

## **Grant approval**

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

13.06 Mon 29 Apr	000	<b>?</b> 29 % 💽
Approvals	Budget proposition	
Search for approval	r Full screen ∥ Annotate	🕒 Return 🕑 Approve
Urgent 1 ap Budget proposition for public	Cancel Approve OK	Created da File plan
Budget proposition		*********** ######### ########## #######
no deadline 3 apr		######### #########
IT infrastructure budget		######### ######### ######### ########
Public forum format and outlin		********** *********
Ministry templates		********** ********* ******
		######### ######### ######### ########
		*****
		*********** ********** ********
Meetings	Approvals Copy recipient	

Figure 56. Grant approval

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

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

Read more about processing approvals.

### **Resume approval**

When an approval is returned to your step from a subsequent approver, you can resume it via the ribbon.



Tap **Resume** in the ribbon to resume the selected approval. A dialogue will open where you choose with whom to resume the approval. You can also add a comment.

15.42 tirs. 2. apr.				•••				🗢 84 % 🔳
Godkendelser		Jobor Frist: 1	oslag 22. januar 2024 23	8.59				Akt-id: <b>69275</b>
Søg efter godkendelse	2	۲ ۲	uld skærm 🧳	Annotér		Ģ Ny cha	t 🕒 Returner	🥑 Genoptag
Haster	1 godk	Fortryd	Genop	otag godker	ndelse	ОК		
Referat for Møder i det fri 19. januar 2024	- 3. udg	Genoptag hos:	Genoptag hos:	Per Sidenius				
22. januar 2024	2 godke	Bemærkning				_	<u>C</u>	BRAIN The Process Company
Kontrolrapport - 3. kvartal 22. januar 2024							info@ www. 02. ap	cbrain.dk cbrain.dk r 2024
<b>Jobopslag</b> 22. januar 2024								
🔎 Jobopslag								
1. februar 2024	1 godk							
Kontrolrapport 2024 1. februar 2024						c	og hvilke, der er til	
Ingen frist	5 godke					e i c	stitel] skønnes væse I omfanget af bilag r	ntligst at nest
Sv: Borgerhenvendelse			<b>D</b> eschlasses tilling					
Ministersvar		0 0	Her anføres kor Her anføres kor hvis der er særli Løsning	t og præcist hva ge problemer.]	ad problemstillingen	er (afhænger af	sagsindholdet). Anf	ør gerne,
🤲 Møder		🕑 Godl	kendelser	6	Kopimodtager			\$

Figure 58. Resume approval

Read more about resuming approvals.

# Chat from an approval

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

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

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

### Create a new chat on an approval

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



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

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



Figure 60. Add chat participants

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

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

13.04 Mon 29 Apr	000	<b>२</b> 30 % 🔳
Approvals	Budget proposition for public political for Deadline:	Record ID: 737
${\sf Q}_{{\sf S}}$ Search for approval	$^{ m K}$ _ Full screen	🖓 New chat   G Return 🗸 Approve
Urgent 1 approval	Approval document	Chat
Budget proposition for public polit 1 $\vartheta$	MMM Maisy Moore, Myles McDougall	(2 participants) ····
Budget proposition	02/12/20	021 12:35
no deadline 3 approvals	Please book a meeting with mr Fitzger then	ald to go over this. I cannot approve this until
IT infrastructure budget 1 $$		۵
Public forum format and outline $$0\ 0$$		
Ministry templates		
	Send message	>
Meetings	<ul> <li>Approvals</li> <li>Copy rec</li> </ul>	ipient 📿 Chats

Figure 61. The chat window

The chat is also available on the chats list.

## View chats on an approval

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

Tap a chat to open the chat window.

Approvals   Search for approval   Urgent   1 approval   Budget proposition for public political forums   Deadline:   Search for approval   Image:   Search for approval   Image:   Im	cord ID: 737
Search for approval Subscreen   Urgent 1 approval   Budget proposition for public polit 1 %   I % Myles McDougall, Maisy Moore   Myles McDougall: Fyi, the deadline is due to the SoM needing guidelines to move forward of th	Approve
Urgent     1 approval       Budget proposition for public polit     Approval document       L     Chat	
Budget proposition for public polit         1         Mixed proposition         Myles McDougall, Maisy Moore         Myles McDougall: Fyi, the deadline is due to the SoM needing guidelines to move forward of the some set of the source set of the some set of the some set of the source	
Budget proposition Myles McDougall: Fyi, the deadline is due to the SoM needing guidelines to move forward to	14:55
	with prepar
no deadline 3 approvals	combor 2021
IT infrastructure budget 1 0 1 1 1 0 1 0 1 0 1 0 1 0 1 0	rove this u
Public forum format and outline 0 $$ 0	
Ministry templates	
Meetings Approvals Copy recipient 📿 Ch	

Figure 62. Chats overview on an approval

# **Copy recipient in F2 Manager 2**

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

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



Figure 63. Overview of copy recipient approvals

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

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

# The approvals list for copy recipients

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

Copy recipient			
🔍 Search for approval			
no deadline	2 approvals		
New grant application reply template			
(DRAFT) Grant application reply templ			
Guidelines for cross-secreta	riat commu 0 0		

Figure 64. The copy recipient approvals list

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

# Search for approvals

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



Figure 65. Search for approvals

# **Copy recipient ribbon functions**

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

$^{\ltimes}$ $_{\bowtie}$ Full screen	🧪 Annotate	🖓 New chat	(i) Mark as read
	Eiguro 66	Europtions in the conv reginient ribbon	

Figure 66. Functions in the copy recipient ribbon

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

The functions are as follows:

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

# **Read and annotate approval**

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

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

## Process approval as a copy recipient

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

∑⊿ Full screen 🖉 Annotate 🖓 New chat 🕕 Mark as read

Figure 67. Copy recipient processing options

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

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

13.22 Mon 29 Apr **奈** 23 % 💽 ... Submission concerning citizen letter 4324 Copy recipient Deadline: Record ID: 94 Search for approval  $^{k}$  Full screen 🥒 Annotate (i) Mark as read no deadline 1 ap Cancel Mark as read OK Submission concerning citizer Comment 💱 Meetings  $\bigcirc$  Chats Approvals G Copy recipient

Figure 68. Mark approval as read

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

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

# Chat from an approval as a copy recipient

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

Read more about chatting from approvals.

# Chats in F2 Manager 2

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

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



Figure 69. Overview of chats

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

# The chats list

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



Figure 70. The chats list

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

## Chats are removed from the list

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

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

# **Search for chats**

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



Figure 71. Search for chats

# **Chats ribbon functions**

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

## Functions in context of approvals

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

 Substrate
 Image: Substrate in the charts
 Image: Substrats
 Image: Substrate in the ch

The functions are as follows:

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

## Functions in the context of agenda items

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



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

The functions are as follows:

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

# Create a new chat

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



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

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

13.21 Mon 29 Apr

Chats	DRAFT - Reply	y to parliamer	nt inquiry		Interview strategy
Search for chat	⊾ Full screen	🥒 Annotate	Oisplay attachme	ents	💱 Go to meeting
DRAFT - Reply to parliament i	ancel	Chat particip	ants	ОК	Chat
MM, MM, SM 59 minut					(3 participants) •••
Budget proposition for public	arch for chat participants orites				-
New budget	Myles McDougall Case manager, Ministry				verify that no changes
FF, MM 2 Decembe M	Maisy Moore Minister, Ministry				
S	Siún Moynihan Chief consultant, Secreta	riat of the managen	nent		
	Send message				>
Meetings	Approvals		Copy recipient		

Figure 75. Add chat participants

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

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

15.12 Fri 10 May			• • •		🗢 100 % 🛃
< Follow-up to interview	w	Interview strategy			
Agenda		⊾ Full screen 🖉 🧳	Annotate		Ģ New chat
Example of grant reply	2 🖓 1 🕅	Agenc	da item	Chat	
Interview strategy	2 🖓 2 🛈	← MNSMMM Maisy Moor	re, Sadie Maxwell, Myles McDouc	Jall	(3 participants) •••
Strategy outline			10/05/2024	4 15:12	
Inquiry reply		I believe we s management	hould also prepare a public state is already being improved	ment as a follow up and include	how our grant
		Send message	0		>
👽 Meetings		Approvals	Copy recipient	<> C⊦	hats

Figure 76. Write a message in the chat window

# The chat window

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

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

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

15.18 Fri 10 May



Figure 77. The chat window

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



Figure 78. Open the chats overview

Tap a chat in the overview to open it.

15.19 Fri 10 May



Figure 79. The chats overview on an agenda item

### **Chat participant menu**

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



Figure 80. The chat participants menu

The functions are as follows:



Function	Description
	Figure 82. Add chat participants
	When you have found your desired participants, tap <b>OK</b> to add them to the chat. Tap <b>Cancel</b> if you do not wish to add participants.

## Access restricted records

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

# **Chat drafts**

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

15.29 Fri 10 May	0 0 0	🗢 100 % 🚺
Chats	New grant application reply template Deadline:	e Record ID: 5
	「」 Full screen ④ Display attachmen	its 🖓 New chat 🕕 Mark as read
New grant application reply templat MMD	e Approval document Draft]	Chat
Interview strategy ITO 0 minute	es ago [Draft] Maisy Moore, Myles McDougall	
Interview strategy SAM, MMD 1 minute(	s) ago Maisy Moore, Sadie Maxwell	15:02
Example of grant reply MMD 14 minute	es ago	
New grant application reply templa SAM 15 minute	e es ago	
Implementation and use of the mini MMD 23 minute	ste 25 ago	
Example of grant reply SAM, SMU 4 hou	rs ago	
🐨 Meetings	Approvals	Copy recipient Q Chats
	Figure 02 Chat drafts an a	

Figure 83. Chat drafts on an approval

# **Unread chats**

#### Unread chats are also bolded in the chats list.

13.03 Mon 29 Apr	000	<b>२</b> 30 % 💽
Approvals	Budget proposition for public political for Deadline:	rums Record ID: 737
🔍 Search for approval	$^{r}{}_{\!$	🖓 New chat 😋 Return 🥑 Approve
Urgent 1 approval	Approval document	Chat
Budget proposition for public polit 1 Ø	MMM Myles McDougall, Maisy Moore	14:55
Budget proposition	Myles McDougall: Fyi, the deadline is due to the SoM	I needing guidelines to move forward with prepar
no deadline 3 approvals	MMM Maisy Moore, Myles McDougall	2 December 2021
IT infrastructure budget 1 $$ 0	Maisy Moore: Please book a meeting with mr Fitz	gerald to go over this. I cannot approve this u
Public forum format and outline 0 Ø		
Ministry templates 0 Ø		
🍧 Meetings	Approvals Copy reci	pient 📿 Chats

Figure 84. Unread chat on an approval

# Chat orientation on approvals

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

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

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

15.37 Fri 10 May	000		<b>२</b> 100 % 📝
Chats Search for chat	New budget Deadline: <sup>K</sup> 뇌 Full screen ④ Display attachm	ents	Record ID: 519
New budget MM, MM 1 minute(s) ago	Approval document		Chat
Submission concerning citizen let PP, MM 29 April 2024	Myles McDougall, Maisy Moo  Myles McDougall	10/05/2024 15:36	(2 participants) ····
Budget proposition for public polit MM, MM 2 December 2021	Here is the budget proposal as real answering related questions durin	quested. It should provide g the interview	e proper foundation for
New budget FF, MM 2 December 2021			
	Send message		>
ere Meetings	Approvals	Copy recipient	

Figure 85. Remove chat from F2 Manager 2

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

# Settings in F2 Manager 2

You can change your personal settings in F2 Manager 2 by pressing the **settings icon**  $\clubsuit$  in the bottom right corner of the app. Read more about the settings options from the "Settings" dialogue in the following sections.



Figure 86. Settings in F2 Manager 2

# Adjust list size

You can adjust the width of the list on the left. This can be useful if an approval has a long title. In the app's "Settings" under "General" you can choose whether the splitter should be adjustable or locked in place by tapping on the slider.

15.16 tirs. 2. apr.								<del>?</del> 8	6 % 🔳
Spillested		×	Nyt spillested Dato: 11. april 2024	4 14.00 - 16.00			Dagsor	denspunl	kter: 3
Torsdag, 11. april 2024	1	møde	<sup>ĸ</sup> ⊿ Fuld skærm	믐 Vis alle punkte	er				
Nyt spillested 14.00-16.00	3 dagsordens	Fortry	'd	Indstillinger		ОК			
		Genere	lt						
		Vælg	om bredden af list	en kan justeres:				0 🕅	~
				Send logfil				1 ()	~
		Møder						1.0	
		Vis m	øder per:		Dag	~		ιU	<b>`</b>
💱 Møder		(	Godkendelser	<b>()</b> K	opimodtager				\$

Figure 87. Choose whether list width should be adjustable

If you choose the list width to be adjustable, a handle will appear in the middle of the splitter. Press the handle and drag it to your desired list width. Your chosen width will be saved across sections in the F2 Manager 2 app.

11.11 tor. 8. feb.					🗢 85 % 🔳
Godkendelser 🤍 Søg efter godkendelse		Kontrakt Frist:	••• Mere	G Returner	Akt-id: <b>79586</b>
Haster	1 godkendelse		Godkendelsesdokum	nent	
Referat for Møder i det fri - 3. udgave 19. januar 2024	10				
22. januar 2024	1 godkendelse	Kontrakt			CBRAIN The Process Company
Kontrolrapport - 3. kvartal 22. januar 2024	4 0	Sagsnummer 2024 - 28 Akt-id 79586 Dokumenter Godkende Aktdokum Oprettet 22-01-202	elsesdokument nent 24 13:25:24		info@cbrain.dk www.cbrain.dk 05. feb 2024
31. januar 2024	1 godkendelse	Startdato 22-01-202	24 13:25:48		
Ministersvar #12 31. januar 2024	•	Intern frist [Indsæt dato og tid] Læsevejledning [Her angives, hvilke bilag og ev orientering. Eks. "[Samlet antal	vt. afsnit ministeren kan fokus I væsentlige sider]: Siderne x-	sere på og hvilke, der e x i [bilagstitel] skønne	er til s væsentligst at
1. februar 2024	1 godkendelse	læse. Sider x-x i [bilagstitel] er muligt.]	primært til orientering.' Mini	mer altid omfanget af	bilag mest
Kontrolrapport 2024 1. februar 2024	4 0	Det indstilles [her anføres kort <b>Problemstilling</b> [Her anføres kort og præcist hv hvis der er særlige problemer.]	t og præcist, hvad der indstille vad problemstillingen er (afha ]	es] ænger af sagsindholde	t). Anfør gerne,
Ingen frist	5 godkendelser	Løsning [Her anføres, hvordan den ang vedlagte svarudkast, men hold	givne problemstilling indstilles	s løst. Undgå at kopier er evt. med pointer, so	e eksempelvis om ikke
Sv: Borgerhenvendelse	1 0	kan/skal fremgå af svarudkaste Kommunikation og videre pro [Her angives pressemæssige ov relevant. Det anføres præcist, l el. lign).]	et.] ces vervejelser samt oplysninger hvem (kontor/MS/andre) der	om den videre proces, r gør hvad og hvornår (	hvis det er afsender svar
N / 1-1 - 1 - 1		Koordineret med IHer anføres hvem sagen er ko	oordineret med internt/ekster	rnt.l	
💱 Møder 📀	Godkendelser	🚯 Kopimodtaç	ger	$\bigcirc$ Chats	\$

Figure 88. Adjust list width

# View meetings per day or week

You can choose whether your meetings for the rest of the week should be displayed in the meetings list when you select a day in the meeting calendar. In "Settings" under "Meetings", choose either to display meetings for the selected day or for a week at a time. By default meetings are displayed per day.

# Submit log file

You can manually submit logs from F2 Manager 2. In "Settings" under "General", tap **Submit log file** to send a log file to cBrain. Use this function if you experience errors in F2 Manager 2.

15.16 tirs. 2. apr.							<del>?</del> 86	% 🔳
Spillested	×	Nyt spillested Dato: 11. april 202	4 14.00 - 16.00			Dagsorder	nspunkt	:er: 3
Torsdag, 11. april 2024	1 møde	<sup>⊼</sup> ⊿ Fuld skærm	믐 Vis alle punkter					
Nyt spillested 14.00-16.00	3 dagsordens	tryd	Indstillinger		ОК			
	Gene	erelt						
	Væl	g om bredden af list	en kan justeres:				0 🕅	~
			Send logfil				1 ()	~
	Mød	er						
	Vis	møder per:		Dag	~		1 0	~
€.€ Madar		Godkandelser	<b>e</b> Kon	imodtager		O Chate		<i>(</i> *
v Møder		Ouvendeiser	Кор	inioutager				

Figure 89. Submit log file

# **Offline functionality in F2 Manager 2**

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

## The synchronisation queue tracks offline actions

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

15.41 Fri 10 May		••• <del>&gt;</del> 100 % 🧃					
No server or Internet connection. Your actions will be queued and processed when you have an Internet connection again.							
Approvals Q Search for approval Deadline +7	2 approvals	Ministerial response Deadline: 7 May 2024 <sup>™</sup> 」 Full screen	Ministerial response Deadline: 7 May 2024 00:00 <sup>N</sup> y Full screen 🖉 Annotate G New chat G				
			Approv	al documen	it		
Ministerial response Tuesday, 00:00	0 0						
Ministry templates		Ministerial resp	onse			C	
rimiting completes	0 0	Case number Record ID	2024 - 36 960			info@cl www.cl	brain.dk brain.dk
Deadline +14	1 approval	Documents	Approval document Record document			10 May	2024
Evaluation Q1 2024	1 0	Approval type Created on Started on	For approval 02/05/2024 11:13:44 02/05/2024 11:24:11				
no deadline	2 approvals	Deadline	07/05/2024 23:59:00				
IT infrastructure budget	10		Name	Status	Comments		
		Responsible user	Myles McDougall				
Public forum format and	1 outline 0 0	Step no. 1 (Approver)	Maisy Moore	approves			
Meetings		Approvals	<b>В</b> Сору	recipient		∽ c	hats

Figure 90. F2 Manager 2 when offline

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

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

# Handling synchronisation problems

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

while F2 Manager 2 was offline.

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

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

15.50 Fri 10 May	000	🗢 100 % 🛃
The approval 'New grant application reply ter any, have not been processed. The following record actions have taken plac 1. Document content changed: 'Approval doc	nplate' that you approved has been changed. Your approval and comments, if since the approval process reached your inbox: ument'	orove <u>Open</u> X roval <u>approval</u>
Approvals     Search for approval     20 May 2024   1 approval	New grant application reply template Deadline: 20 May 2024 23:59 <sup>K</sup> <sub>24</sub> Full screen  Annotate Approval document	Record ID: 5
New grant application reply template 20 May 2024 1 0		
(DRAFT) Grant application reply templ	New grant application reply template	<b>CBRAIN</b> The Process Company
	Sagsnummer     2024 - 2       Akt-id     5       Dokumenter     Approval document (DRAFT) Grant application reply template	info@cbrain.dk www.cbrain.dk 10 May 2024
	Oprettet         10/05/2024 11:30:05           Startdato         10/05/2024 11:32:05           Frist         20/05/2024 23:59:00	
	See attached. The template has been expanded to include additional details as required l bill. Keep in mind that its contents will be subject to the outcome of the upcom minister.	by the recently passed ing interview with the
	Ansvarlig Sadie Maxwell	Kommentar
Meetings	Approvals Copy recipient	○ Chats

Figure 91. Process a synchronisation issue

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

# F2 Manager 2 configuration options

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

- Restrict a user's access so they can only log in via F2 Manager 2. This means that the user is excluded from using F2 Desktop and F2 Touch.
- Set up that ministers can only be added to meetings by users with the "On behalf of minister" standard role. This can also be applied to permanent secretaries using the "On behalf of permanent secretary" standard role.
- Choose the default value for adding records to ad hoc meetings (Automatically/Manually).
- Choose the default time periods for when a case is available on F2 Manager 2.
- Choose when approvals received as a copy recipient disappear. The default value is 30 days.
- Choose whether to keep chat-oriented approvals on F2 Manager 2 even when finally approved. If this is applied, approvals remain on F2 Manager 2 for a limited number of days - typically seven days.
- Adjust parts of the title of the annotation document that can be created as part of an approval. By default, the annotating user's username is included in the document's title. For example, the user Maisy Moore would be listed as "MM" in the title of an annotation document. It is possible to configure how the title refers to the user so that Maisy Moore, for example, is referred to by her full name or by her initials as specified in the participant register.
  - **NOTE** The above list of configurations is not exhaustive. cBrain recommends that all configurations are made in cooperation with cBrain.