Settings and setup

Created on 12/01/2025 04:11 for F2 version 12

Settings and setup

You can configure F2 to make your work easier. Adjust the layout in the main and case windows, standardise texts using document templates and signatures, and share your efficient setups with your colleagues.

This topic provides you with an overview of the features you will find on the "Settings" tab. The tab is located in the main window, but your choices apply no matter where you are working in F2’s user interface.

Settings options

The different setup options in F2 are grouped by topic on the "Settings" tab. Below is an overview of the topics you will find on the tab.

Setup: You can set up your personal preferences for everything from how records are opened and emails are imported to adding "out of office" messages, but you can also choose to apply any default settings created by your organisation’s administrators.

Customise views: Customise the layout of the result list and its preview. For example, you can control how layout elements are displayed and save standard column settings.

Templates: Standardise your work and communication with automatic signatures and templates.

Language: Select the language in F2. Your choice not only affects the text in the user interface, but also the language in which F2 Help and F2 Docs open and other language-related options.

Personal setup

The following sections go over the different tabs of the **Setup** dialogue, which is accessed via the "Settings" tab in the main window.

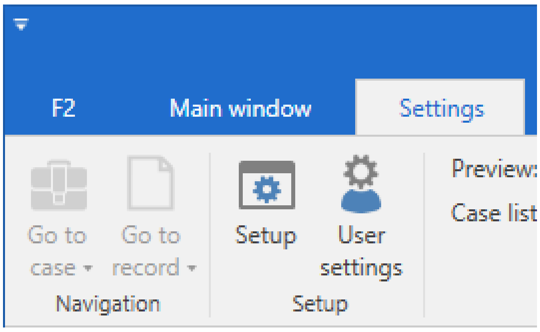


Figure 1. "Setup" on the "Settings" tab

The "General" tab

You can change the general setup of F2 on the **General** tab.

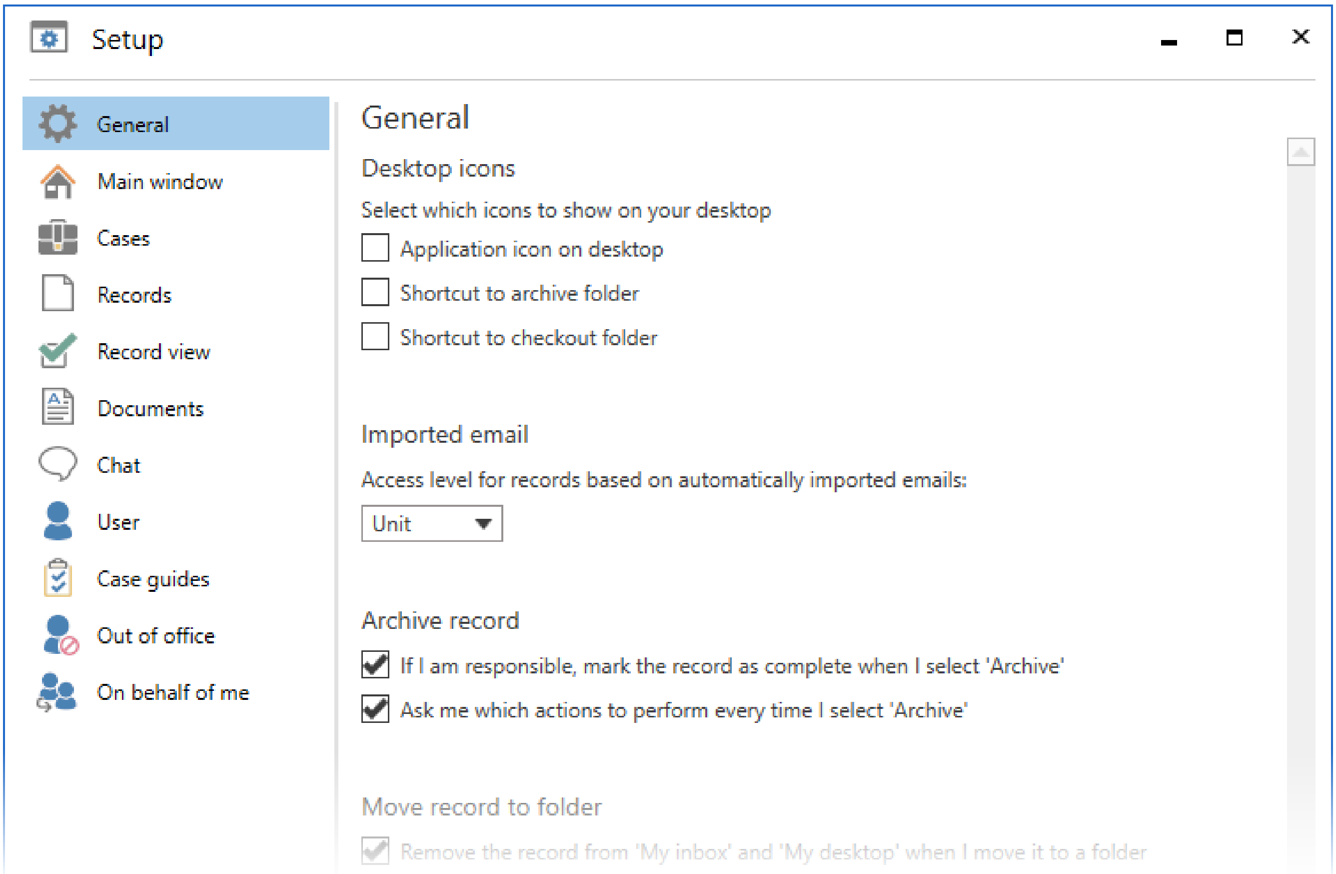


Figure 2. "General" setup

The available setup options are described in the table below.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Desktop icons”</td><td>The following icons can be added to or removed from the computer’s desktop:

• The F2 programme icon.
• A shortcut to the “Archive folder” (i.e. the folder for importing files to F2).
• Shortcut to the “Check out folder” (i.e. the folder in which you can place documents for offline work and check back into F2).

Read more about checking documents in and out.</td></tr>
<tr><td>“Imported email”</td><td>Here it is possible to determine which access level F2 assigns to imported emails.

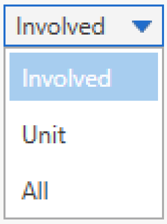


Figure 3. Access levels for imported emails

Read more about access levels in F2.

NOTE The default access level is “Involved”. It can be an advantage to set the access level to “Unit”. This way, if a user is not present, the colleagues in the unit are still able to see emails intended for the unavailable user.</td></tr>
<tr><td>“If I am responsible, mark the record as complete when I select 'Archive'”</td><td>Tick this box to automatically set the record as complete when archived if you are responsible for the record.</td></tr>
</table>

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td></td><td>Figure 4. The “Move record to a folder” dialogue</td></tr>
<tr><td>“Remove record from 'My inbox' and 'My desktop' when I move it to a folder”</td><td>Tick this box to automatically remove the record from “My inbox” and “My desktop” when you move the record to a folder.</td></tr>
<tr><td>“If I am responsible, mark the record as 'Complete' when I move it to a folder”</td><td>Tick this box to automatically set the record to complete when moved to a folder if you are responsible for the record.</td></tr>
<tr><td>“Ask me every time I move a record to a folder, which actions to be performed”</td><td>Tick this box to automatically open the dialogue below when you move a record to a folder.

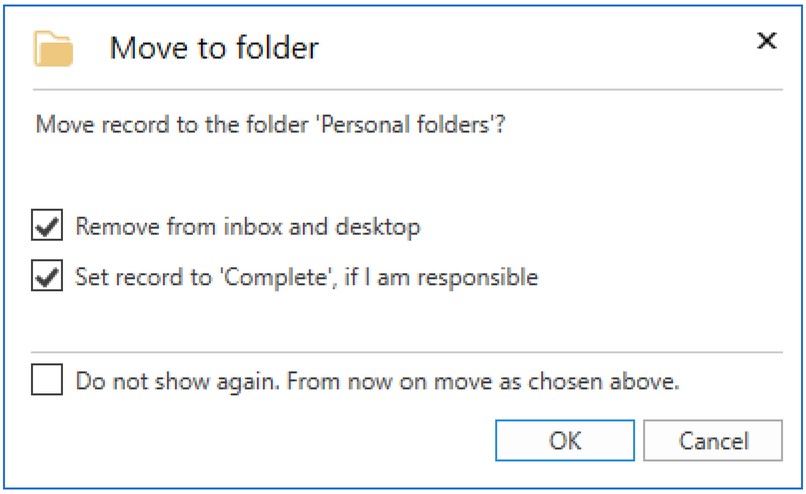


Figure 5. The “Move to folder” dialogue</td></tr>
<tr><td>“Default rights for supplementary units and case managers”</td><td>Choose one of the following access rights for supplementary units or users when they are added to a record:

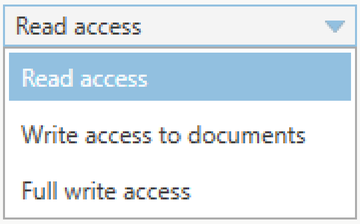


Figure 6. Select access rights

Read more about access rights.</td></tr>
<tr><td>“Show only record preview (no document preview)”</td><td>Tick this checkbox if you are using a screen reader and want to avoid delays when navigating between the attached documents in the document area.

If the feature is enabled, click on Show preview in the middle of the preview to display a preview of the record’s attached documents.</td></tr>
</table>

Function	Description
	Read more about accessibility in F2 (documentation available in Danish).
“Show number of new notifications on the F2 taskbar icon”	Tick this box to display the number of notifications on the F2 icon in the computer’s taskbar.  *Figure 7. Displayed number of notifications*
“In my personal inbox”	If this box is ticked, the F2 icon flashes when you receive a new record in your personal inbox.
“In one of my units' inboxes”	If this box is ticked, the F2 icon flashes when you receive a new record in one of your unit inboxes.
“Ask before closing F2”	Tick this box to show the “Close cBrain F2?” dialogue when closing F2.

The “Main window” tab

On the **Main window** tab, you can personalise the setup of F2’s main window including searches and how their results are displayed.

Figure 8. “Main window” setup

The available setup options are described in the table below.

Function	Description
“Limit search results to:”	Specify the maximum number of search results to display in the result list when a search is performed. F2 shows the number of results on the blue status bar in the bottom left corner. If search results have been limited to e.g. 300, F2 shows no more than 300 results even if the actual number of results is greater. **NOTE** A high search result limit may cause a slower search performance.
“Limit search results in the participant database to”:	Specify the number of search results to display when a search is performed in the participant register. F2 shows the number of results on the blue status bar in the bottom left corner. If search results have been limited to e.g. 1000 participants, F2 shows no more than 1000 participants even if the actual number of search results are greater.
“Show warning when mass operations fail”	If this box is ticked, a warning appears when a mass operation fails.
“Always hide my search fields when I change lists”	F2 remembers if search fields for a given list are displayed or hidden. Tick this box to hide the search fields when changing lists.
“Mark a record as read after X sec delay”	Tick this box to automatically mark a record as read after you select it in the result list and preview it. Also determine the duration in seconds before it is marked as such. This also applies to the case window result list. If your preview is hidden or the box is unticked, the record will be unread until it is opened or marked as read from the context menu.

Function	Description
“Open calendar invitation externally”	Tick this box to open calendar invitations directly in Microsoft Outlook from the F2 inbox by either pressing **Enter** or by double-clicking. F2 opens Calendar invitations as emails by default. **NOTE** This setup requires an active calendar integration in the F2 installation.

The “Cases” tab

On the **Cases** tab, you can, among other things, define which security groups to add to newly created cases and which fields to display by default when opening a case.

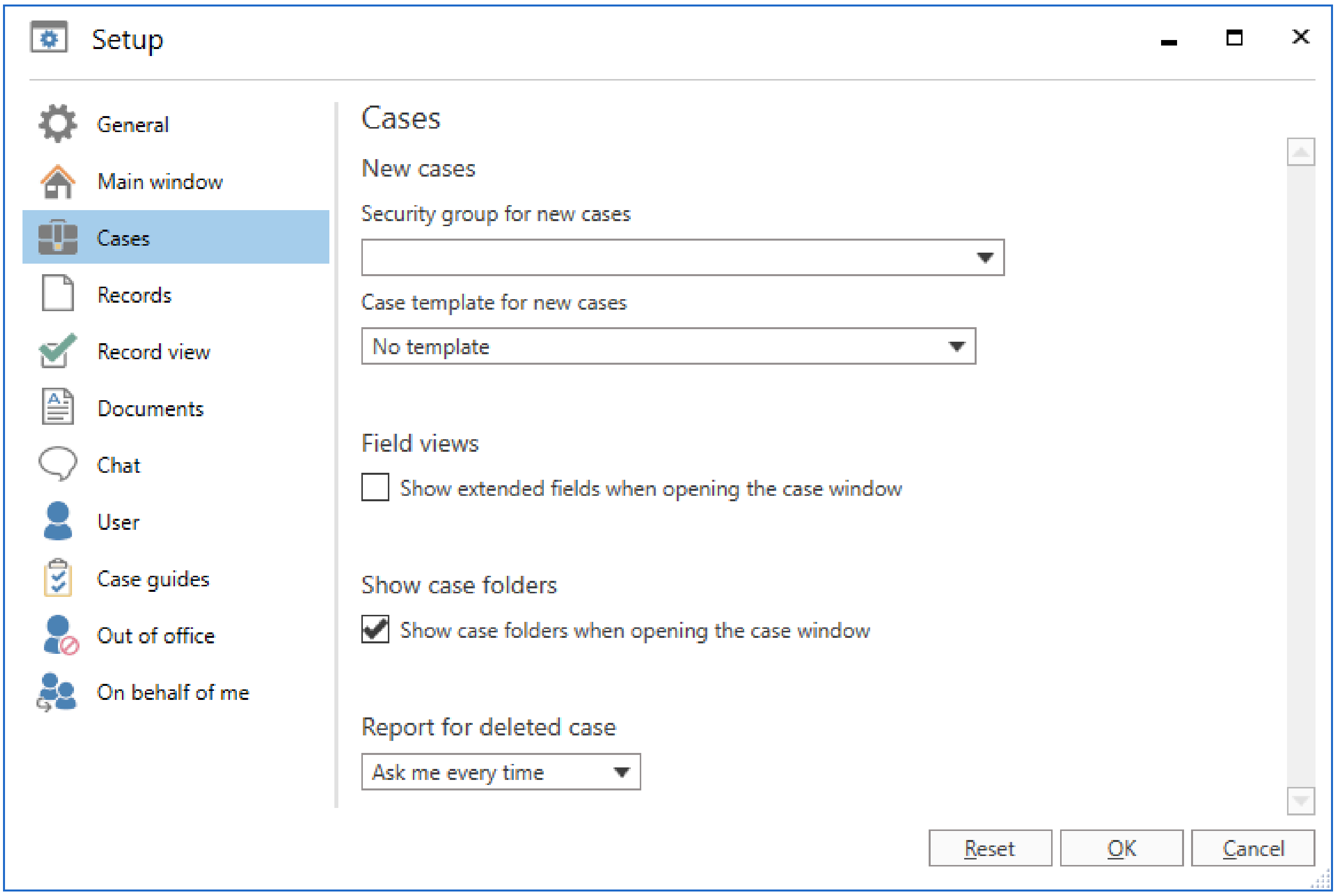
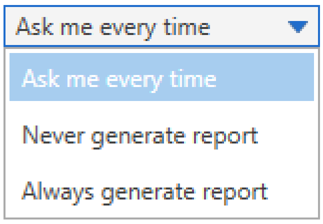


Figure 9. “Cases” setup

The available setup options are described in the table below.

Function	Description
“Security group for new cases”	Specify one or more security groups to automatically add when creating a new case. If this field is not filled in, no security groups are added when you create a new case. Security groups function as access groups with the purpose of protecting data in F2. A user with the “Security group administrator” privilege can assign users to security groups. Read more about security groups.
“Case template for new cases”	Specify which case template that is selected by default when you create a new case. Read more about case templates.
“Show extended fields when opening a case window”	Tick this box to show the extended metadata fields when opening a case window.
“Show case folders when opening the case window”	Tick this box to show the case folders, if any, when opening a case window. You can always toggle case folders for a given case from the case window ribbon.
“Report for deleted case”	Select a report option for when a case is deleted. This setting is only visible to users with either the “Can delete cases” privilege or the “Can delete everything on cases” role.  *Figure 10. Report for deleted cases* The report generating options can be disabled. This means that users with the aforementioned privilege or role cannot generate reports for deleted cases. The configuration is performed in cooperation with cBrain. Read more about deleting cases.

The “Records” tab

You can adjust the setup of the record window on the **Records** tab.

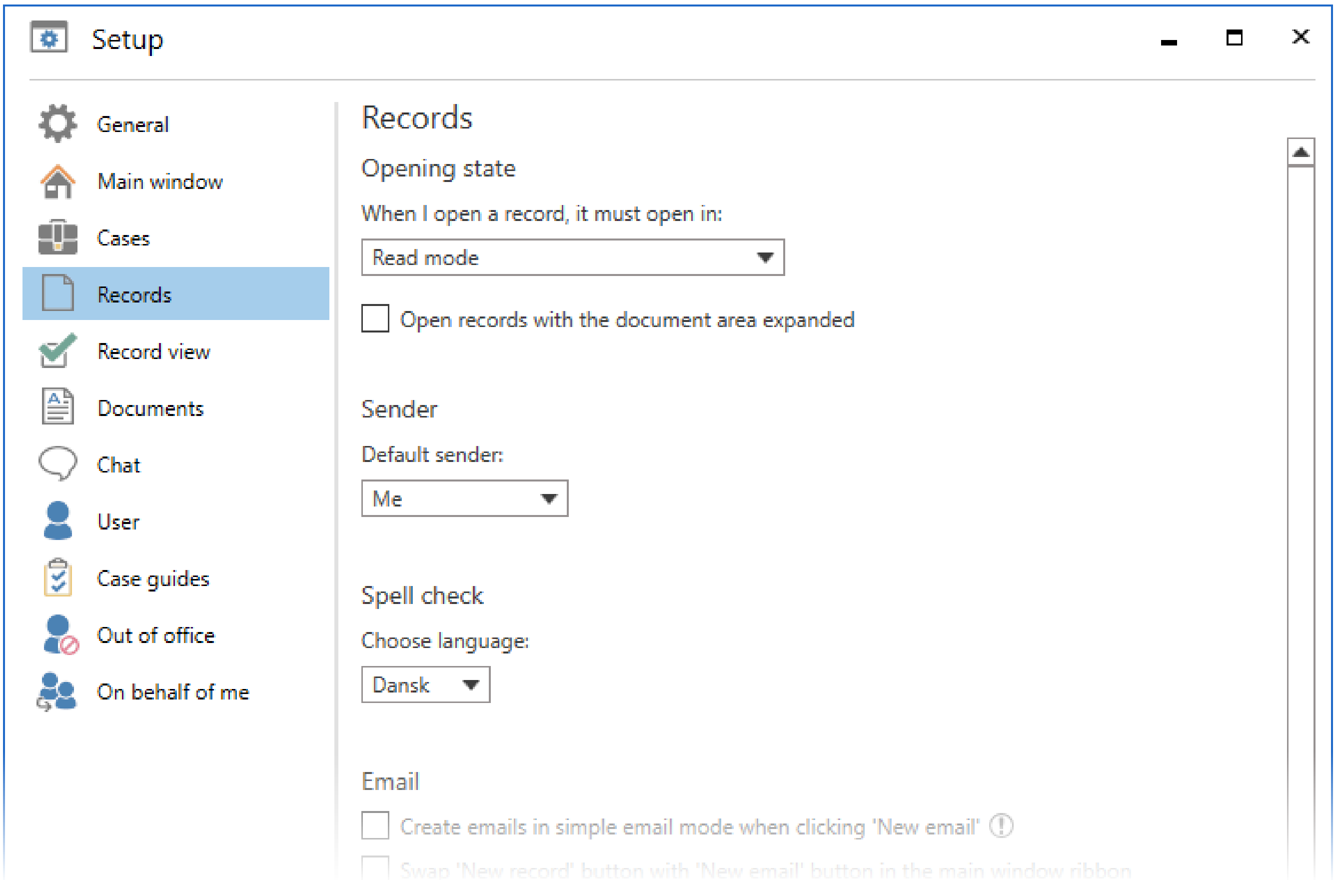
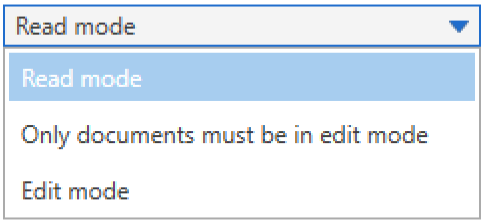
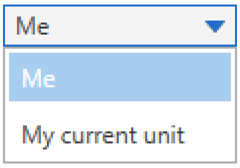
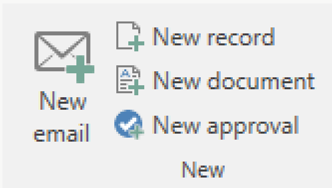


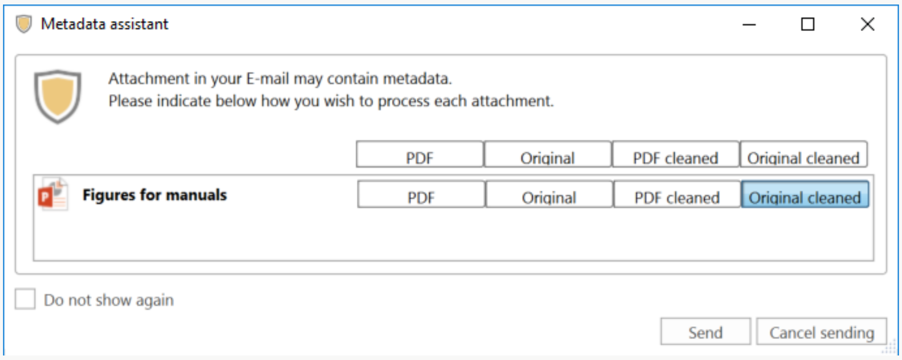
Figure 11. “Records” setup

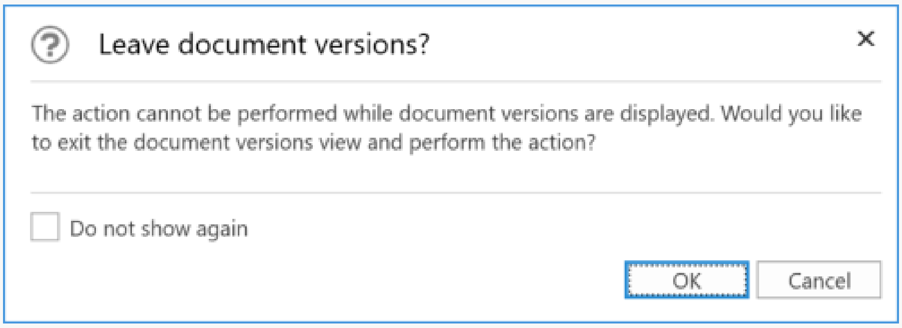
The available setup options are described in the table below.

Function	Description
“When I open a record, it must open in:”	Choose in which mode to open a record.  *Figure 12. Modes when opening a record* The following options are available: • “Read mode” means you must click on **Edit** in order to order to edit the record and its metadata. • “Only documents must be in edit mode” opens the record in read-only mode, but any attached documents open in edit mode. • “Edit mode” lets you edit metadata, attached documents, and the record document.
“Open records with document area expanded”	Tick this box to open a record with the document area expanded.
“Default sender”	Select the default sender of new deliveries.  *Figure 13. Select default sender* The following options are available: • “Me” • “My current unit”. **NOTE** It is always possible to select a different sender in the “From” field on an email regardless of the default sender.

Function	Description
“Create emails in simple email mode when clicking 'New email'”	Tick this box to change the default email mode in F2 to simple email mode. Simple emails are created without the metadata fields otherwise available through the record window. Read more in the section New simple email. **CONFIGURATION** The option to create simple emails can be removed through a configuration. This also removes the related setup options. F2 is configured in cooperation with cBrain.
“Swap 'New record' button with 'New email' button in the main window ribbon”	Tick this box to swap the **New record** and **New email** menu items on the main window ribbon, making the latter the primary button in the menu group.  *Figure 15. “New email” as primary button*
“Create emails in simple email mode when clicking 'Reply', 'Reply and include attachments', 'Reply all', and 'Reply all and include attachments'”	Tick this box to open the simple email window when clicking **Reply**, **Reply and include attachments**, **Reply all**, and **Reply all and include attachments** even if the incoming email is not a simple email. When this option is enabled, the incoming email’s case attachment is preserved even though it is hidden in simple email mode.
“Create emails in simple email mode when clicking 'Forward'”	Tick this box to open the simple email window when clicking **Forward** even if the incoming email is not a simple email. When this option is enabled, the incoming email’s case attachment is preserved even though it is invisible in simple email mode.
“Ask before cancelling record changes”	Tick this box to have F2 ask for confirmation when you click **Cancel** in the record window.

Function	Description
	Figure 16. Select the auto save interval The following options are available: • “Never” • “Save every 2 minutes” • “Save every 5 seconds”. **CONFIGURATION** Through a configuration, it is possible to set a custom interval for how often record and approval documents are automatically saved. F2 is configured in cooperation with cBrain.
“Ask before copying record to cases”	Tick this box to have F2 ask for confirmation when copying a record to several cases. If the option is enabled when you attempt to attach a record to multiple cases via the record window case field, the "Copy record to several cases" dialogue opens. This only applies when you attach records to multiple cases using the "Choose cases" dialogue.
“Set 'Unit casework line' when identifying record responsible”	Tick this box to automatically tick off the “Unit casework line” field on a record when the record is allocated to a responsible user or unit. You can still deselect the casework line on the individual record. Read more about the unit casework line.
“Perform clean-up when I send an email”	Tick this box to have F2 automatically complete and move the record to the “Archive” when it is sent.
“I want to confirm (and have the option of opting out of) the clean-up, every time I send an email”	Tick this box to have F2 ask for confirmation before performing the clean-up. You can also toggle the automatic clean-up setting from the confirmation dialogue.

Function	Description
	Figure 17. “Send securely” as a default setting **NOTE** The **Send** button in the record window changes according to your default setting. If you have ticked the “Send securely” box, the **Send securely** item is shown as the default sending option.
“Standard format for my email attachments:”	Choose whether attachments to an outgoing record should have the format “PDF” or “Original”.
“Clean attachments before sending”	Choose whether to send record attachments with or without metadata. This clean-up includes comments.
“Show metadata assistant”	F2 shows you the format of any attachments before an email is sent. Before sending an email to an external participant, F2 opens the dialogue below in which you can choose the attachments' format and whether to include metadata.  *Figure 18. The “Metadata assistant” dialogue* Read more about the metadata assistant (available in Danish)

Function	Description
	Figure 19. The dialogue "Create participants in the participants register" Read more about the "Create participants in the participant register" dialogue.
"If I attempt to perform an approval action when viewing document versions, ask if I want to exit the view"	If you attempt to process an approval while viewing the document versions in the log, the dialogue below appears.  *Figure 20. The "Leave document versions?" dialogue*
"Show comment excerpts on approvals"	Tick this box to show comment excerpts directly in the approval step overview. The excerpts are shown under the approver's name. Read more in Start approval flow.
"Always show copy recipients on approvals"	Tick this box to display the names of copy recipients on approval steps. Read more about copy recipients.
"Include all documents on the record"	Tick this box to pre-select all documents on a record when you create an adjusted record PDF.
"Add document header to the selected documents"	Tick this box to add a page header to all selected documents by default when you create an adjusted record PDF.

The "Record view" tab

You can personalise the default display of the record window on the **Record view** tab.

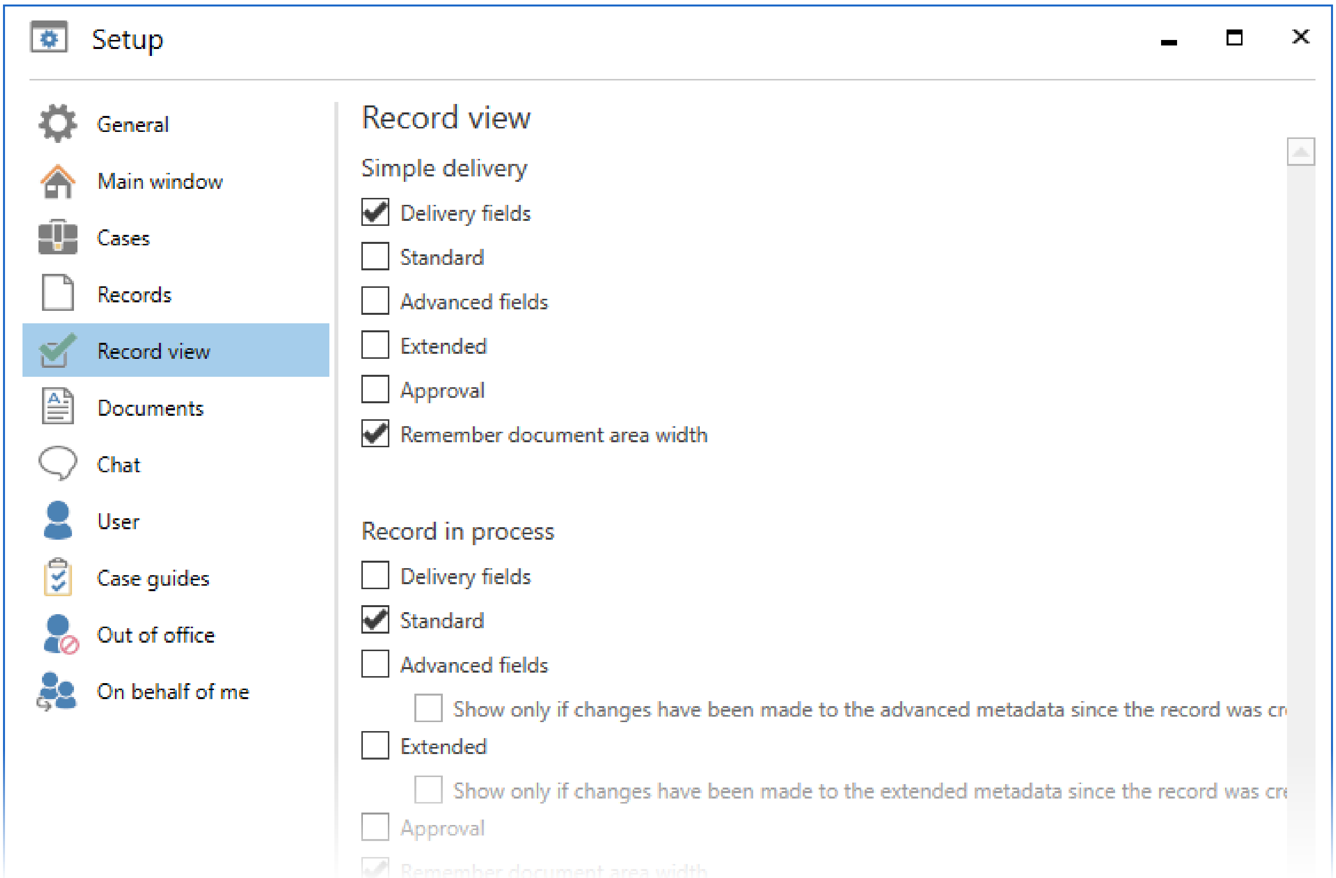


Figure 21. “Record view” setup

The viewing options for the record window are described below. For example, you can choose whether a record opens with its metadata fields collapsed or expanded. It is also possible to have F2 remember adjustments in the width of the document area.

Function	Description
“Simple delivery”	Select how to display metadata for delivery records.
“Record in process”	Select how to display metadata for records in process.
“Delivery in process”	Select how to display metadata for delivery records in process.
“Active approval” (add-on)	Select how to display metadata for active approvals.

Read more about the groups of metadata fields on records.

The “Documents” tab

On the **Documents** tab, choose how to open an attached document. You can also toggle a warning for when you attempt to open write-protected documents.

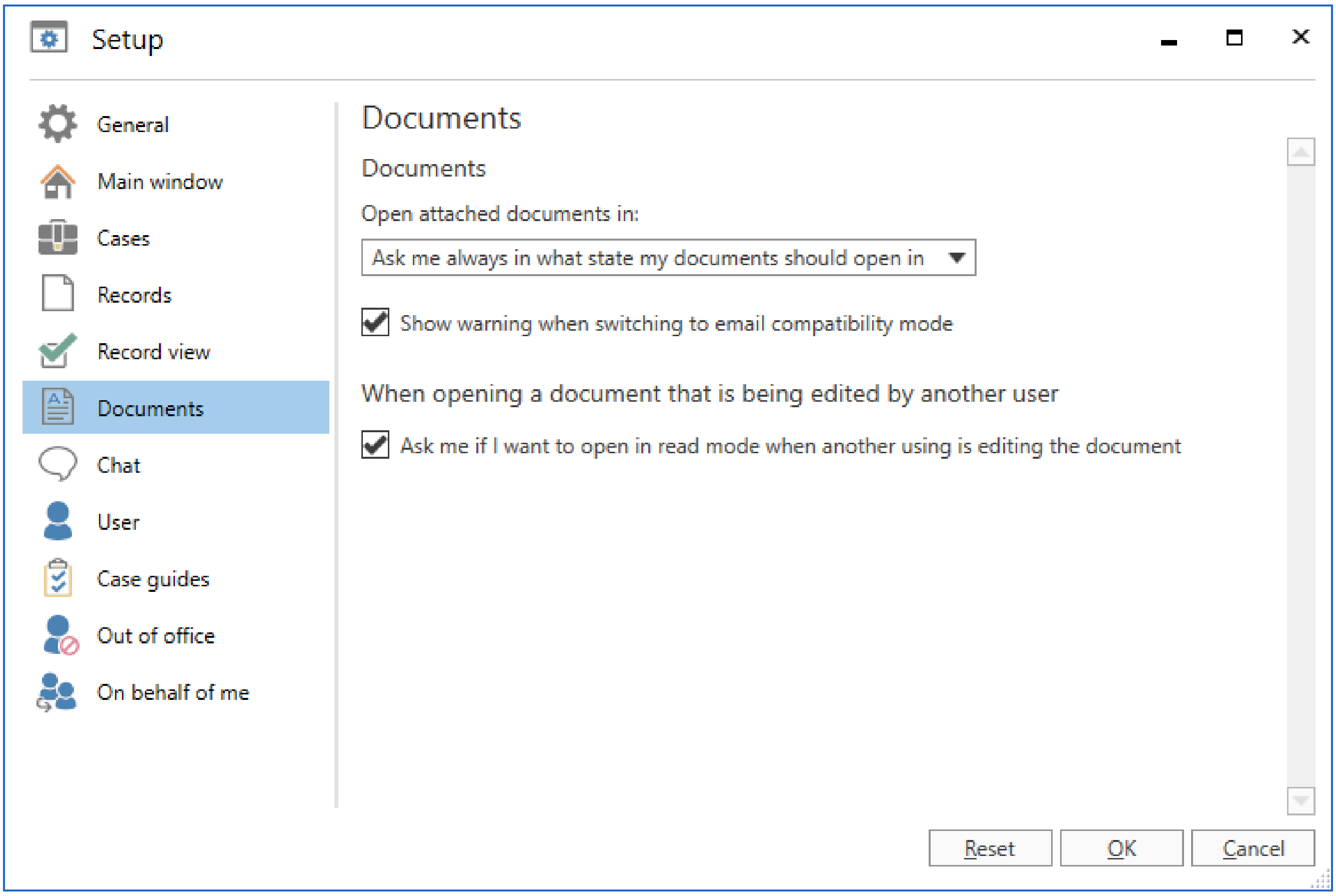


Figure 22. "Documents" setup

The available options for opening attached documents are described in the table below.

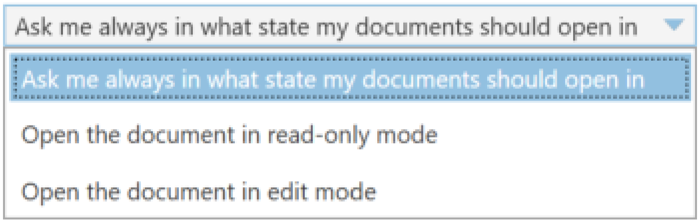
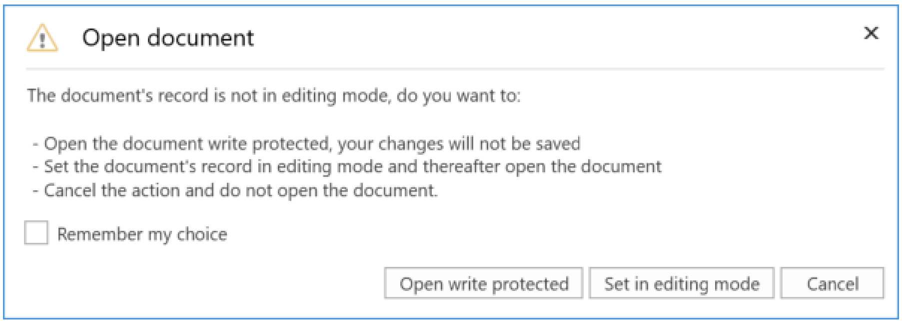


Figure 23. Select the opening state for documents

Function	Description
“Ask me always in what state my documents should open in”	Select this option to display the "Open document" dialogue whenever a document is opened from a record that is not in edit mode. Choose to open the document in read-only mode or in edit mode.  *Figure 24. The “Open document” dialogue*
“Open the document in read-only mode”	The document opens in read-only mode, and changes to the document cannot be saved. This setting is primarily used when a document is to be read but not processed further.
“Open the document in edit mode”	The document opens in edit mode, if you have write access to documents, and can be processed immediately.

CONFIGURATION

Using a configuration, it is possible to display the record document and attached HTML files in compatibility mode. The option is accessed by right-clicking inside the document of e.g. an email that is not displayed correctly. Spell-checking is disabled in compatibility mode. If the configuration is enabled, the checkbox “Show warning when switching to email compatibility mode” is visible on the “Documents” tab. The configuration is performed in cooperation with cBrain.

Locked documents

Below the header "When opening a document that is being edited by another user", you can set up default behaviour for opening a document locked by another user. Tick the box "Ask if I want to open in read mode when another user is editing the document" to trigger a dialogue when you try to open an attached document under these conditions. In this dialogue, you can choose to open the document in read-only mode instead.

Read more about editing documents and taking over a document.

The “Chat” tab

On the **Chat** tab, you can select your preferences for chatting.

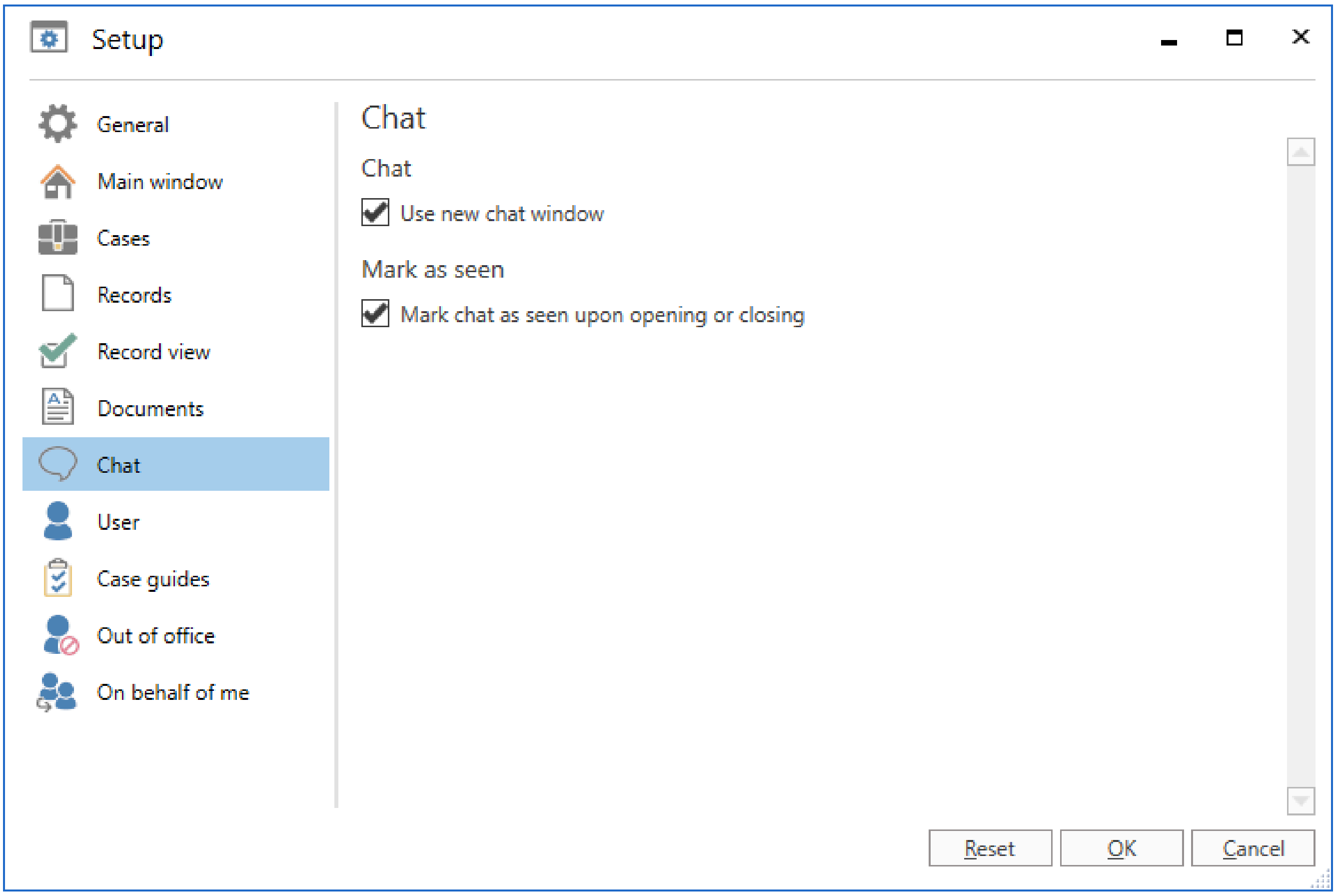


Figure 25. “Chat” setup

The available setup options are described in the table below.

Function	Description
"Use new chat window"	Tick this box to use the new and improved chat window design. Leave the box unticked to instead use the old chat window.
“Mark chat as seen upon opening or closing”	Tick this box to automatically mark a chat as seen when you open or close the chat dialogue.

The “User” tab

On the **User** tab you can select a default job role. If you have multiple roles, you can choose to display the “Select role” dialogue at login.

Additionally, here visually impaired users can activate F2’s accessibility options to operate F2 using a screen reader.

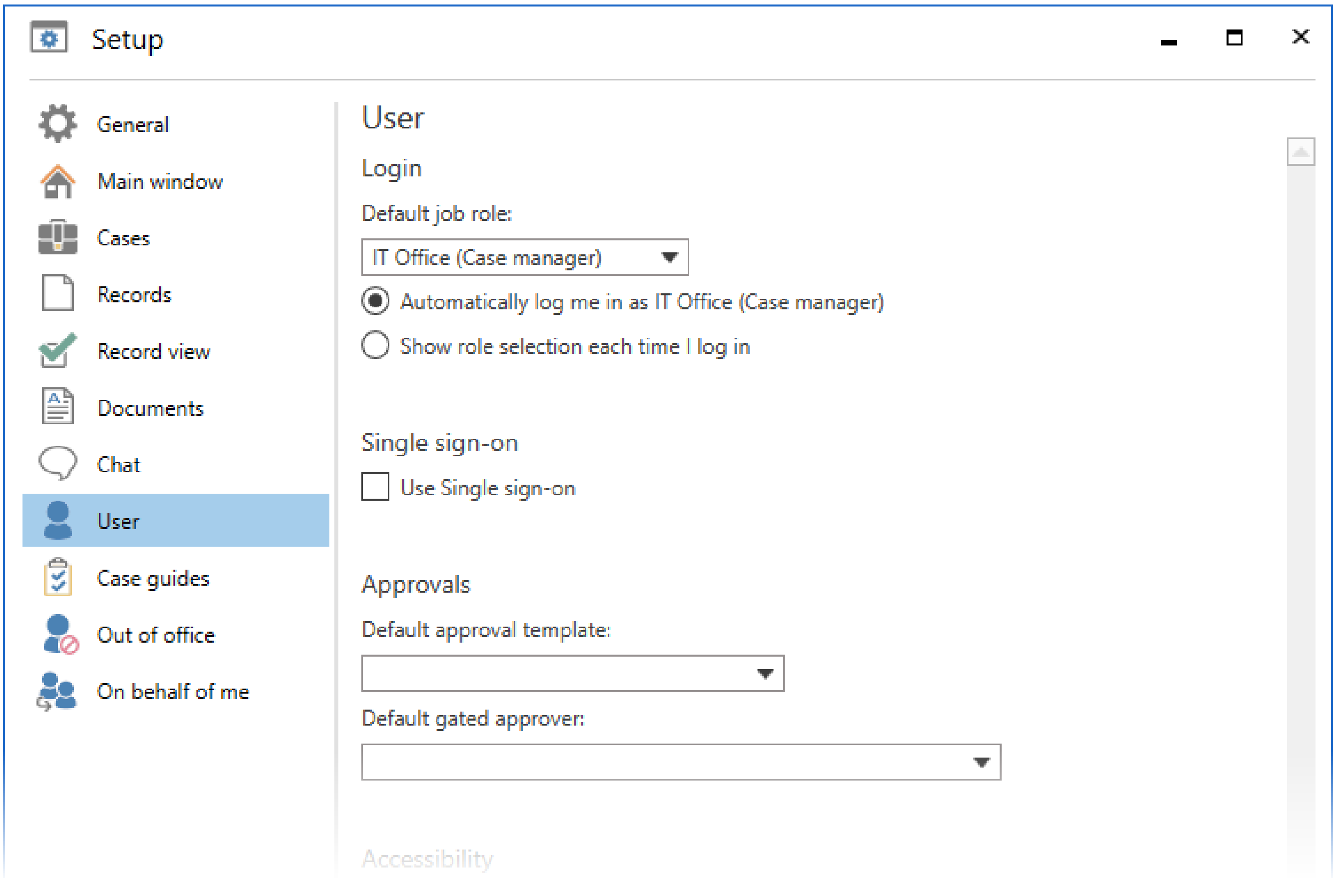
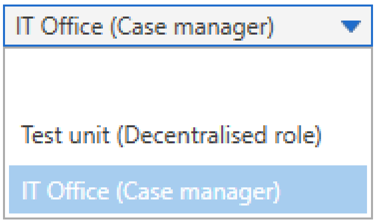
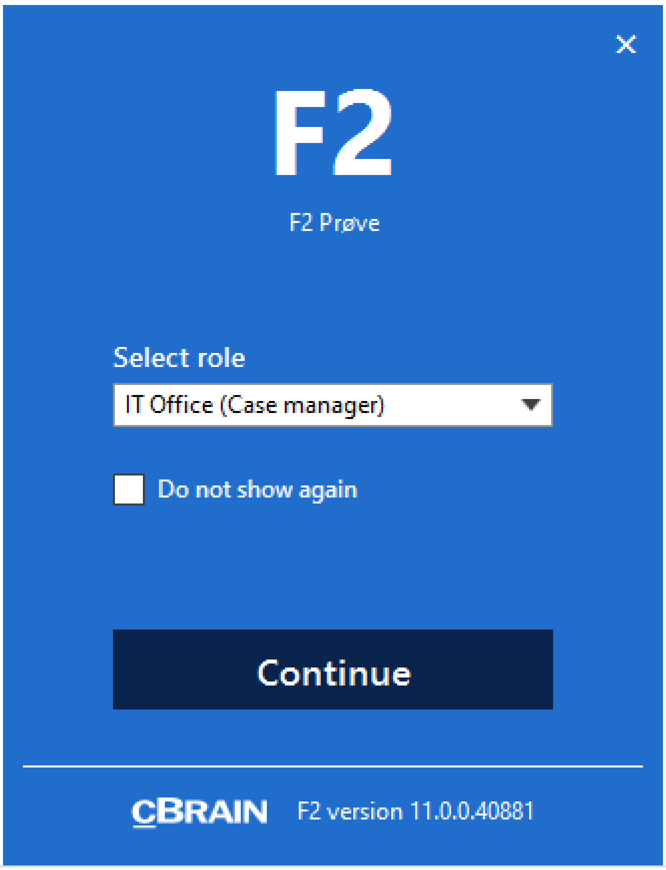
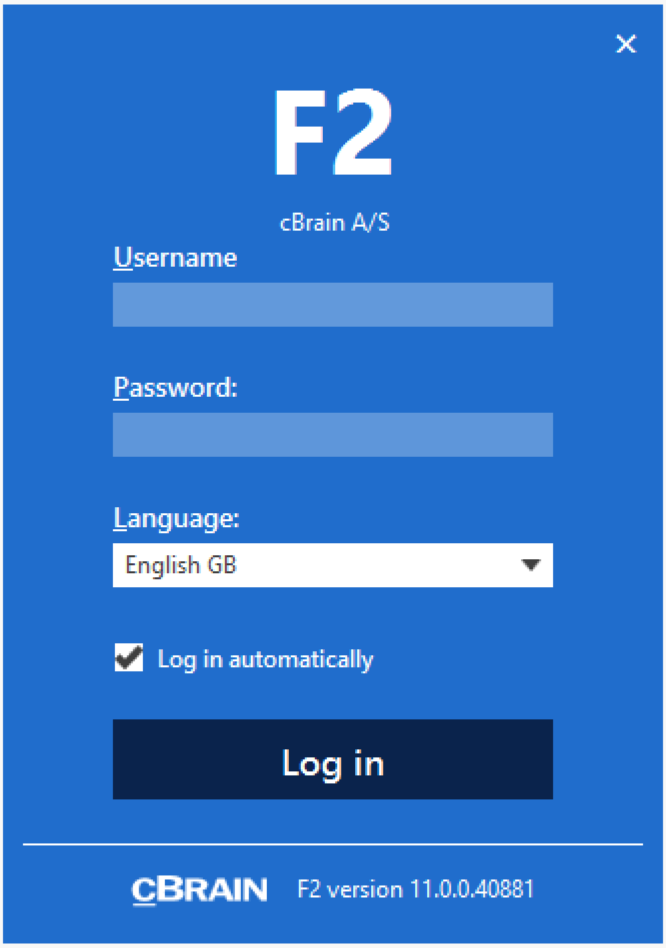
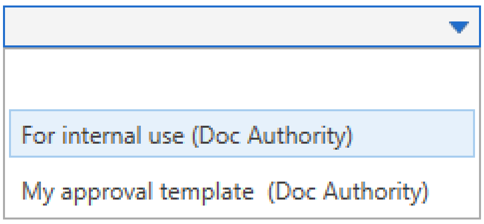
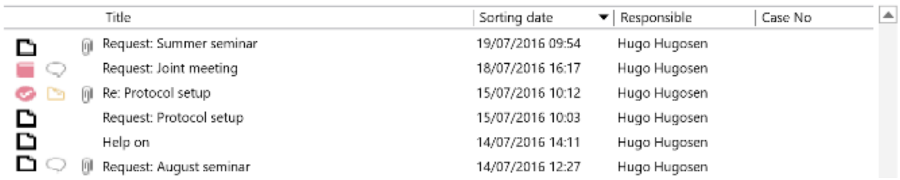


Figure 26. “User” setup

The available setup options are described in the table below.

Function	Description
“Default job role”	Select your default role when logging in.  *Figure 27. Select default role* The available options depend on the job roles you have been assigned by a user with the “User administrator” privilege. This role is also used for email import when assigning responsibility. This means your default role which unit can access and view imported emails once you expand the access level to "Unit". The access level for imported emails is set up on the "General" tab.
“Automatically log me in as”	Choose this option to automatically log into F2 with your default job role.
“Show role selection each time I login”	Choose this option to always display the “Select role” dialogue on login. 

Function	Description
	Figure 28. The “Select role” dialogue
“Use Single sign-on”	Toggle single sign-on. When disabled, you must enter your password when you log into F2. **NOTE** If single sign-on is disabled, it is possible to enable when logging in. Single sign-on uses the Windows login to log into F2.  *Figure 29. Login using “Single sign-on”*
“Default approval template” (add-on)	Select which approval template - if any - to use as a default when creating a new approval process.  *Figure 30. Select default approval template*

Function	Description
	location”, and “Gateway sorting deadline”.
“Use custom icons (further configuration by a system administrator required)”	This function must first be configured in cooperation with cBrain. Users can then enable versions of certain icons that are easier to distinguish. Tick this box to replace the standard F2 icons with high-contrast ones. The icons have a greater difference between light and dark areas as shown in the example below.  *Figure 31. Example of icons with high contrast* **CONFIGURATION** Ticking this box has no effect unless custom icons have been configured in cooperation with cBrain. F2 must be restarted for the changes to take effect.
“Extended screen reader support”	Tick the box to enable the use of a screen reader in F2. **NOTE** Search lists must be manually updated when navigating between them while using a screen reader. This means that highlighting a search list in the main window or in search windows like “Choose participants” will not automatically open it. This ensures quick navigation between lists via the **Tab** key. Press **F5** to load the list results once the relevant list has been highlighted. F2 must be restarted for the changes to take effect.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Show video upon start up”</td><td>Tick the box to toggle the start-up video.

CONFIGURATION The start-up video can only be shown if it is available in the F2 installation. The video is installed in cooperation with cBrain.</td></tr>
<tr><td>“Time zones”</td><td>Choose between the F2 client’s or the server’s time zone. The selected time zone is used e.g. in the timestamps of chats.
“Use the time zone of the computer”: This option means deadlines etc. are shown in your local time when abroad. This also applies when entering dates and times for deadlines or searches. Other F2 users in a different time zone will see the date and time for their own time zone.
“Use the time zone of the server”: This option means deadlines etc. are shown in the time zone of the server. For instance, you may see time stamps in GMT when you are abroad.
Dates and times that are generated on the server are always displayed in the server’s time zone. This applies to e.g. conversion of Word documents into PDF files.

CONFIGURATION This is a configuration option and is configured in cooperation with cBrain.</td></tr>
<tr><td>"List panel display mode"</td><td>Choose how the main window list pane displays searches and lists. Options include "Spacious", "Default", "Compact", and "Ultra compact". The "Spacious" and "Compact" options are more accessible.</td></tr>
<tr><td>"Result list display mode"</td><td>Choose how result lists display the results. Options include "Spacious", "Default", "Compact", and "Ultra compact". The "Spacious" and "Default" options are more accessible.</td></tr>
</table>

The “Case guides” tab (add-on module)

If the F2 Task Guides add-on module is available, the **Case guides** tab is available. Here you can set up case guide preferences.

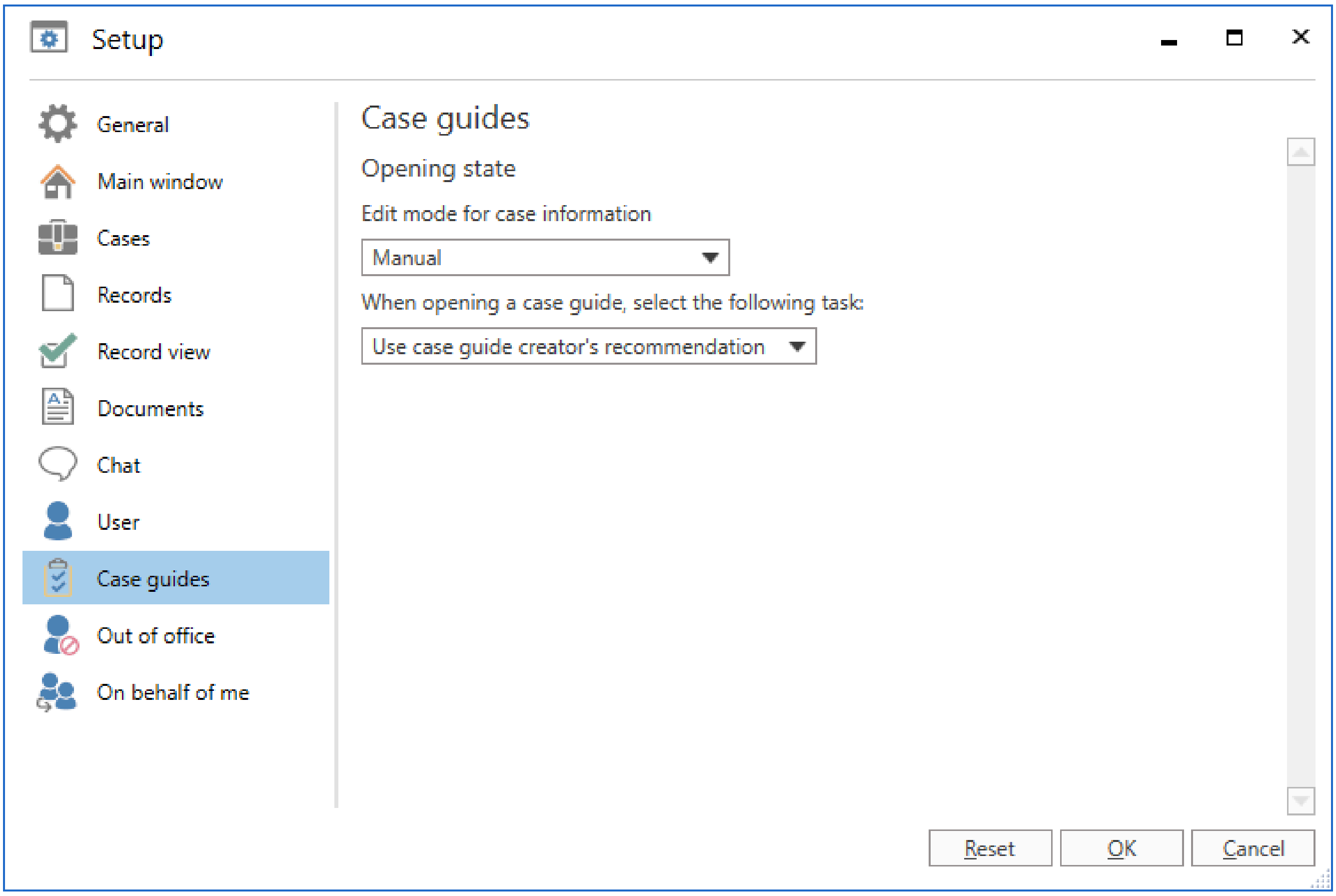


Figure 34. “Case guides” setup

The available setup options are described in the table below.

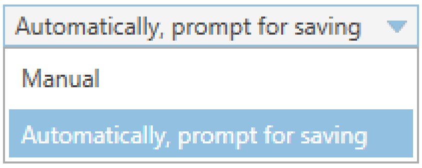
<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Edit mode for case information”</td><td>Select the edit mode for case information when opening a case guide.


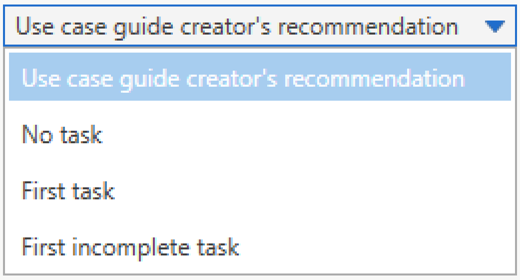
Figure 35. Select edit mode for case information
Choose between:
“Manual”
“Automatically, prompt for saving”.</td></tr>
<tr><td>“When opening a case guide, select the following task”</td><td>Select how to navigate from the selected case guide process.


Figure 36. Select which task to display when opening a case guide
Choose between:
“Use case guide creator’s recommendation”.
“No task”.
“First task”.
“First incomplete task”.</td></tr>
</table>

The “Out of office” tab

Click on **Out of office** in the “Setup” dialogue to create an automatic out of office reply. This message applies to internal communication in F2. External senders may also receive the automatic reply if this is enabled by the organisation in the configuration of the email account.

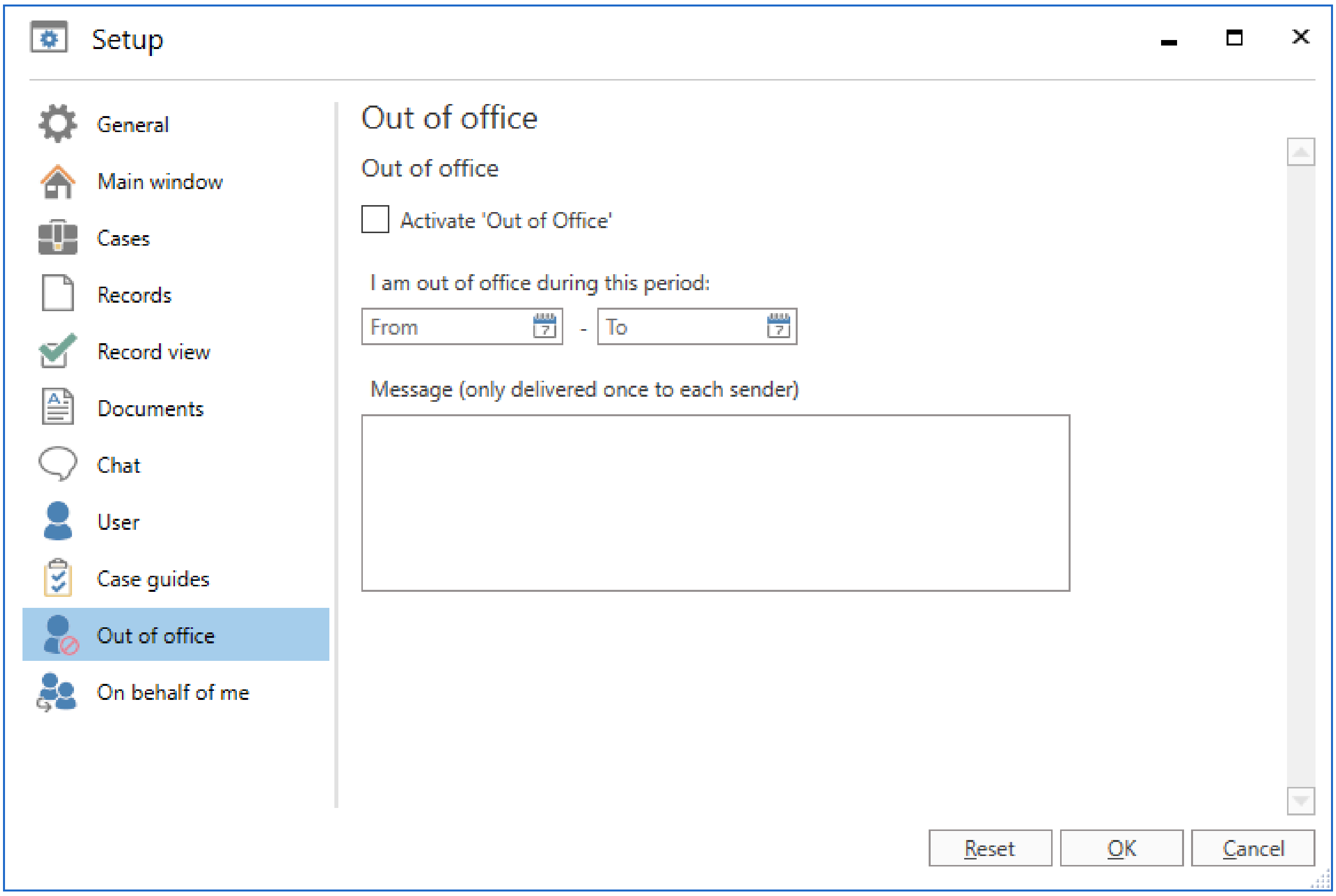


Figure 37. "Out of office" setup

The available setup options are described in the table below.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>“Activate 'Out of office'”</td><td>Tick this box to indicate that you are not present due to vacation, sick leave, etc. When the box is ticked, the “Out of office” feature is activated and automatically sends a reply when receiving an email in F2.

NOTE If no “To” date has been entered under “I am out of office during this period”, the box must be manually unticked when you return.

When active, an "out of office" icon is shown next to your username in F2. The icon is visible e.g. in the chat window and shows each chat participant’s status.</td></tr>
<tr><td>“I am out of office during this period:”</td><td>Specify the period in which you are out of office. Type a date, or select one from the calendar.

“Out of office” is activated automatically when the specified period begins and deactivated when it ends.</td></tr>
<tr><td>“Message (only delivered once to each sender)”</td><td>Enter an automatic reply which is sent to users who attempt to contact you while you are out of office.

NOTE The message is sent to each sender only once, even if you receive multiple emails from the same sender.</td></tr>
</table>

NOTE It is possible to save the “Out of office” settings while logged in on behalf of another user. Other parts of the setup cannot be saved.

The “On behalf of me” tab

Click on **On behalf of me** to assign rights to another user, so they can act on behalf of the unavailable user. This feature is useful when a secretary must be able to act on behalf of a manager or when a user must act on behalf of a colleague who is away from F2.

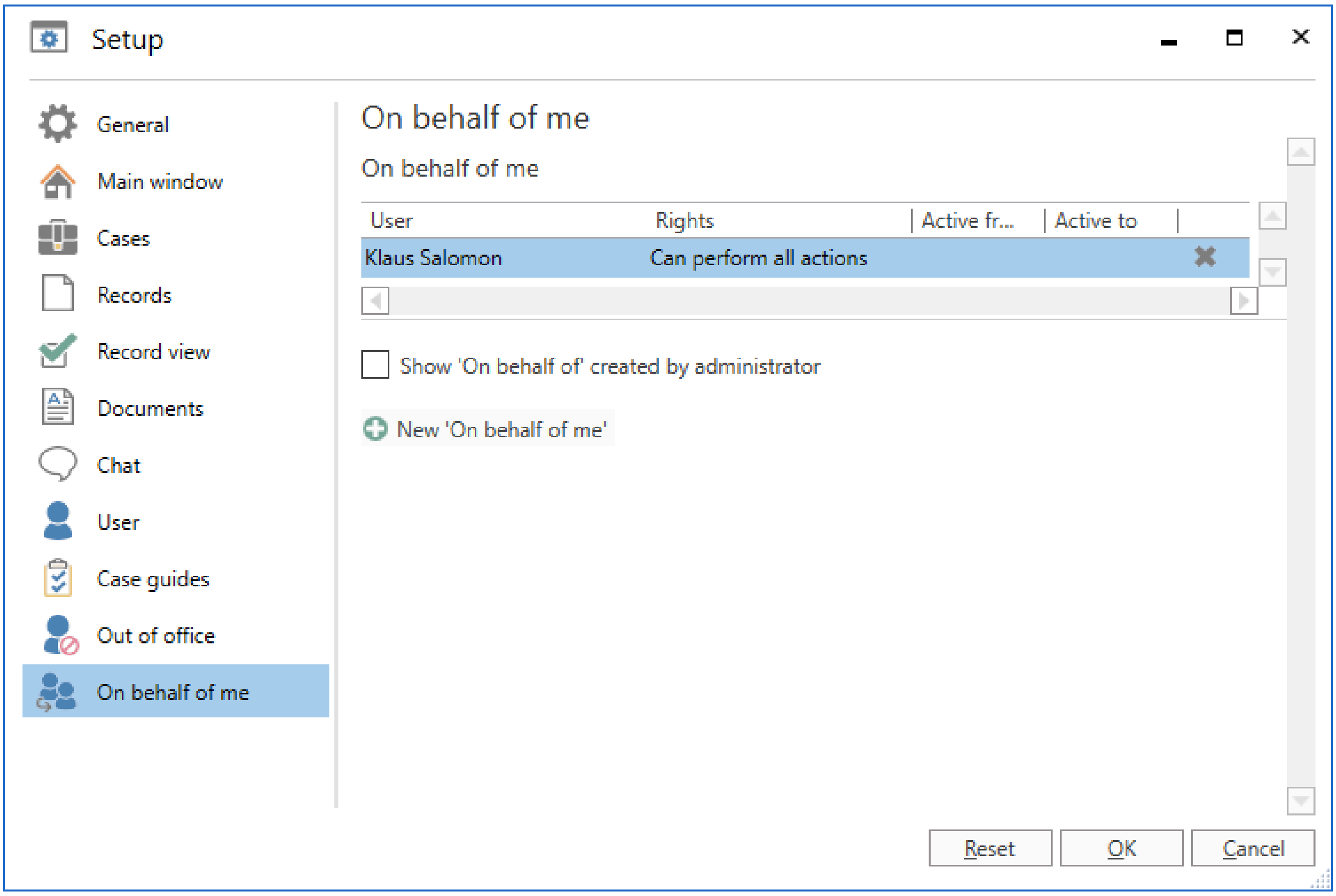


Figure 38. "On behalf of me" setup

The available setup options are described in the table below.

Function	Description
“On behalf of me”	If “on behalf of” rights have been granted to another user, it is possible to see the following in the list: • To whom the rights have been given. • The area covered by the rights. • The duration of the rights. Rights can be deleted by clicking the next to the relevant user. “On behalf of” rights are automatically deleted once the “Active to” date has passed.
“Show 'on behalf of' created by administrator”	Tick this box to view the “on behalf of” rights that have been granted by a user with the “On-behalf-of administrator” privilege.

NOTE It is possible to save the “Out of office” settings while logged in on behalf of another user. Other parts of the setup cannot be saved.

User settings

A user can retrieve a default user setting or partial user, list, or column settings. These defaults contain the setup of specific user, list, or column settings that determine which columns are shown in the result list, column order and width, how columns are sorted, and column grouping, if applicable.

Users with the “Settings administrator” privilege can create and adjust user settings for the users' different roles, as different roles typically require different setups.

Read more about managing user settings.

In the “Settings” tab in F2’s main window, click on **User settings** to open the “User settings” dialogue.

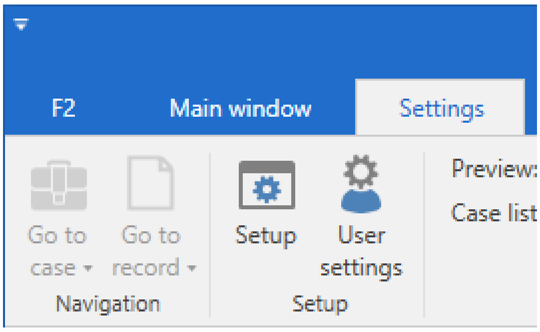


Figure 40. The “User settings” menu item

The dialogue shows a list of all created user settings. Click on the desired user setting and then on the **Use this user’s settings** menu item.

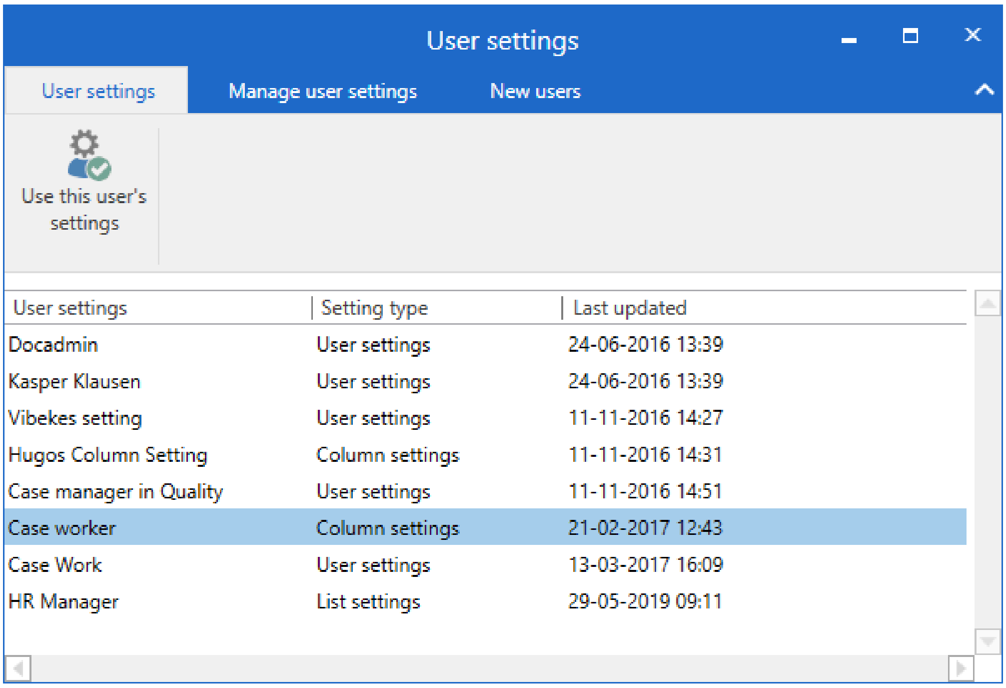


Figure 41. The “User settings” dialogue

Click on **Use this user’s settings** to overwrite your current user settings. A Windows notification confirms that the selected settings have been applied.

User images

It is possible in F2 to add images for F2 users, units, and external participants. The images are displayed in the participant properties dialogue for units, users, and external participants. For users of F2 the image is also displayed in the chat window and in the user identification in the upper right corner of the main, record, and case windows.

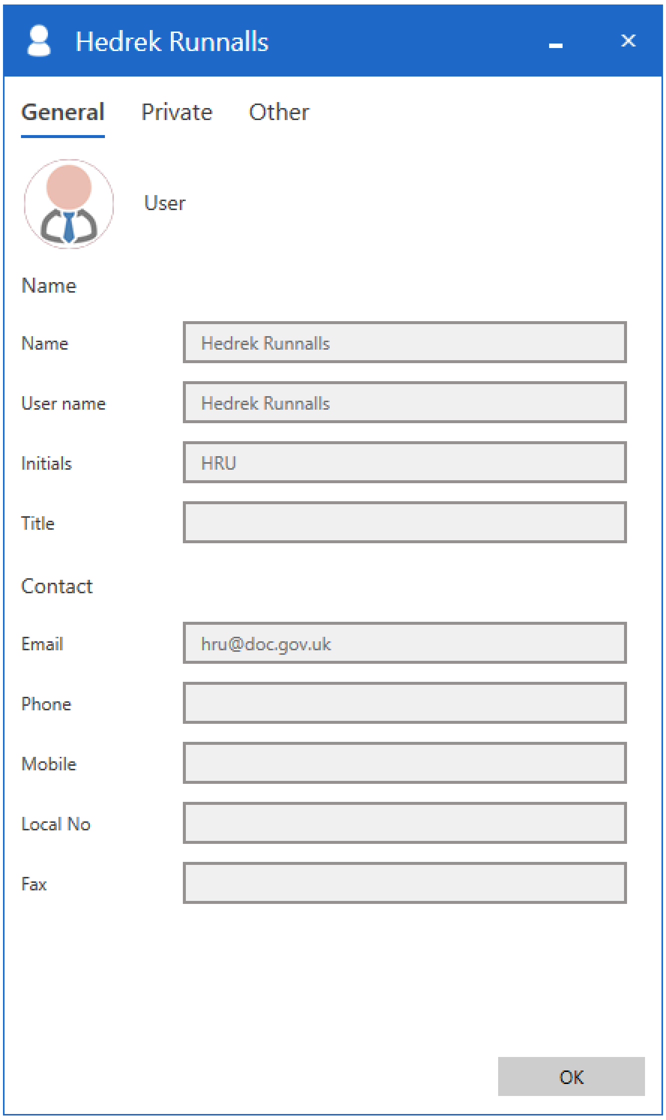


Figure 42. Image in the participant properties dialogue

By default, you can only add, change, and remove your own image and that of private external participants. Only users with the “User administrator” privilege can add, change, or remove images for units and other F2 users.

You can see and change your image using the user identification located in the upper right corner of the main, record, and case windows.

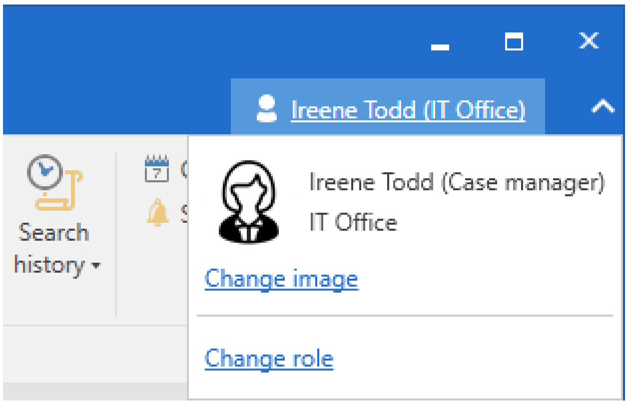


Figure 43. Change the image through the user identification

Read more about adding and changing images.

Set up views in F2

On the “Settings” tab it is possible to set up the list and folder views in F2. The views can be adjusted for every individual list, search and folder. For more information, see Setting up the result list.

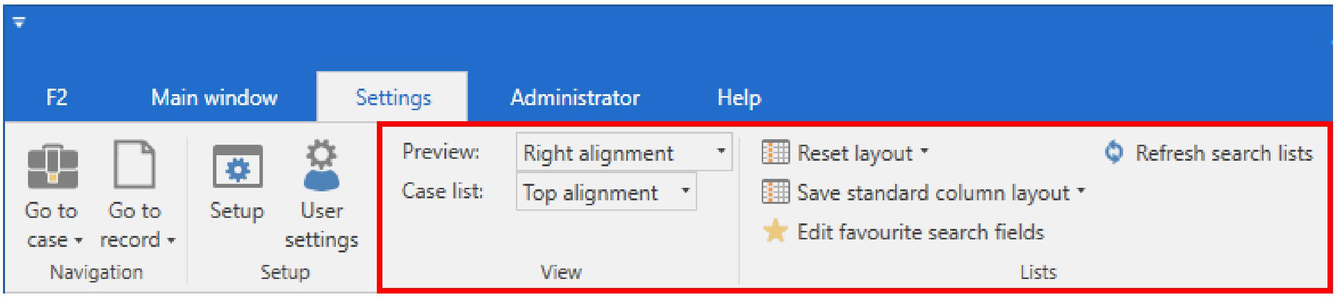
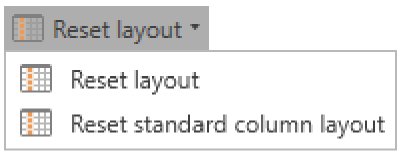
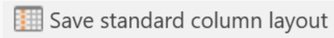


Figure 44. View settings on the “Settings” tab

All menu items in the "View" and "Lists" menu groups are described below, except "Edit favourite search fields". The latter is described in The “Favourites” search group.

Function	Description
“Preview”	You can preview record documents or the first few pages of an attachment in a separate window when you click on a record. The preview is an effective tool to gain an overview of the contents of a specific record. The preview display options are: • “Right alignment” • “Bottom alignment” • “Hidden”. Selecting “Hidden” hides the preview. **NOTE** For large files, only a limited number of pages is shown in the preview. F2 will inform you if this is the case.
“Case list”	Choose where to display the case list when viewing cases in the result list. You have two options: • "Left alignment" • "Top alignment". When cases are displayed on the left, their associated records are shown to the right. When cases are displayed at the top of the main window, their records are displayed below.
“Reset layout”	This menu item is made up of two functions: "Reset layout" and "Reset standard column layout".  *Figure 45. Reset layout* **Reset layout** overwrites any current column layout. If you have saved a standard column layout this will be retrieved, otherwise the global default layout is applied. You can access **Reset standard column layout** by clicking the drop-down arrow of the menu item. It removes your saved standard column layout and replaces it with the global default column layout.

Function	Description
	column layout.  *Figure 46. Save standard column layout* Read more about setting up columns.
"Refresh search lists"	Click here to reload all search lists in the left side of the main window.  *Figure 47. The "Reload search lists" menu item*

There are three different levels for column layouts in F2, as described in the table below.

Level	Description
Basic column layout	This layout is delivered with F2 and are non-changeable.
Global standard column layout	This layout is configured by a user with the “Result list administrator” privilege. It is configured when a new non-personal search is created. F2 then saves this layout as the global standard layout.
Standard column layout	You can save changes you have made to a given list’s columns as your personal standard column layout. Click **Save standard column layout** to save the layout, which you can then apply to other lists. You can apply your standard layout by opening a list and clicking **Reset layout**.

When you save a search, F2 also saves the column layout associated with said search if you have made any changes. If you have not changed the layout, F2 applies the global standard column layout for that search. If this has not been set up either, the basic column layout is used.

Signatures

Click on the menu item **Signatures** in the "Settings" tab to create or edit your signatures.

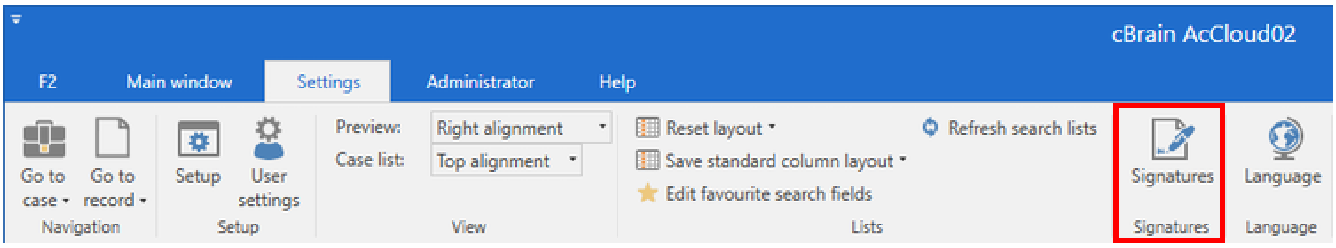


Figure 48. "Signatures" on the "Settings" tab

There are no limits as to how many signatures you can have in F2. However, it is only possible to choose one signature to automatically add when you create a new record.

A default signature template can be set up for all users in cooperation with cBrain.

Create a new signature

Click on **Signatures** to open a dialogue that provides an overview of your signatures.

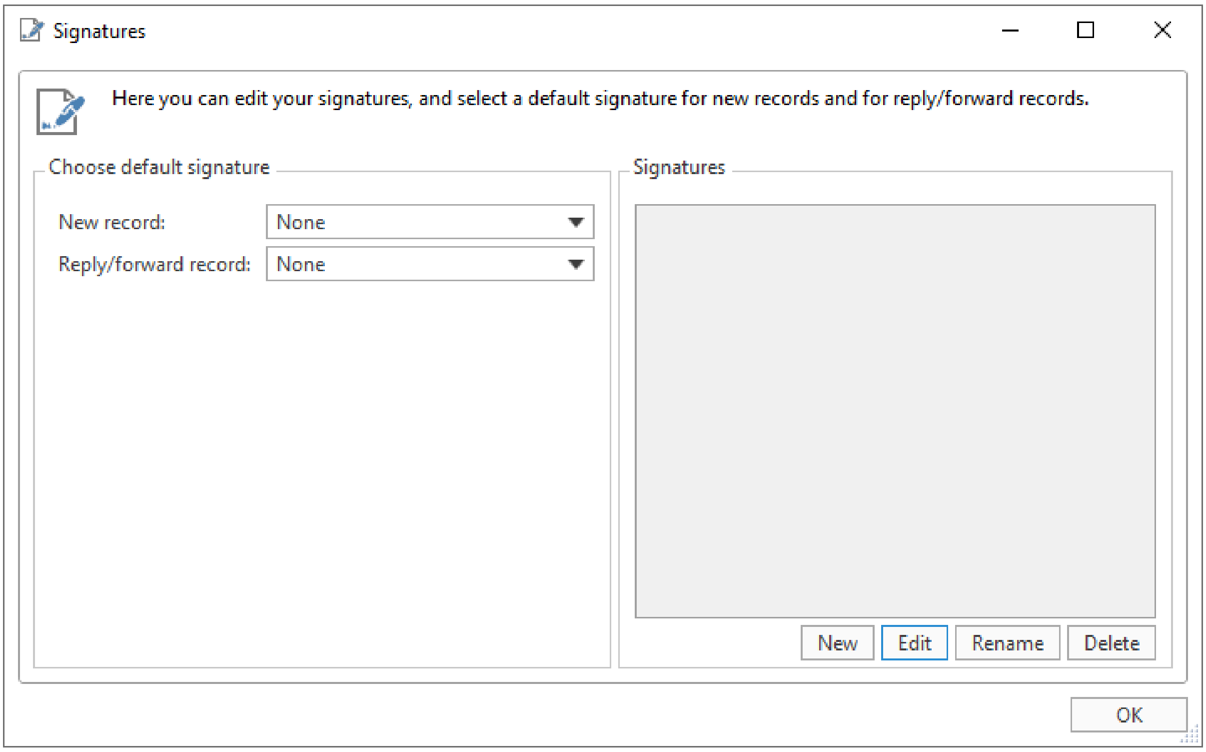


Figure 49. The "Signatures" dialogue

Click on **New**. The "New signature" dialogue opens as shown below where you can name the new signature.

Figure 50. Name the new signature

After entering the name of the new signature, click **OK**. A window then opens in which you can edit the signature, like shown below. When the signature is finished, click **OK**.

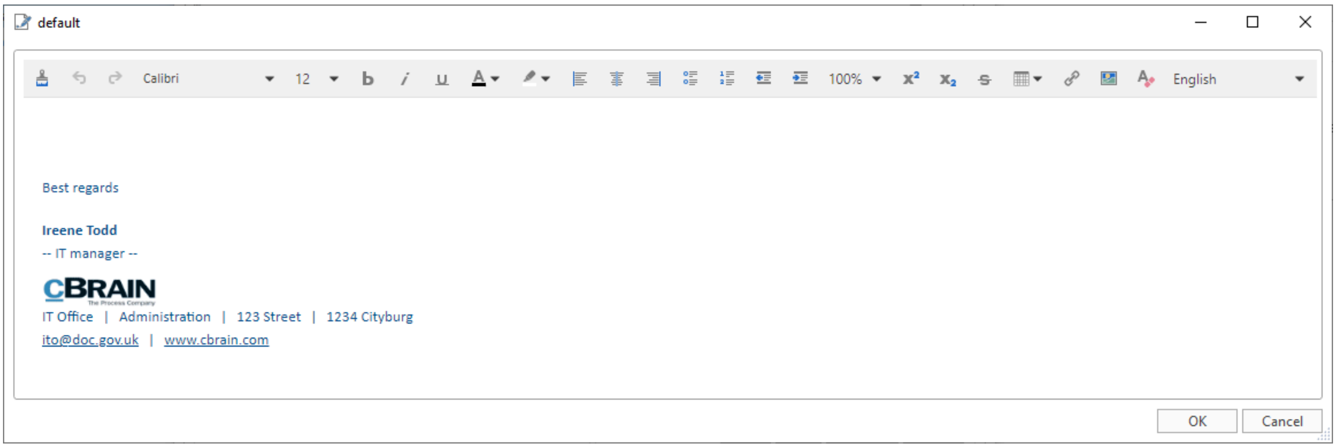


Figure 51. Edit signature

Insert signature

You can insert your signature directly in the record document. To do this, click on the signature icon and select the relevant signature. The text will be placed in the record document where the cursor is located.

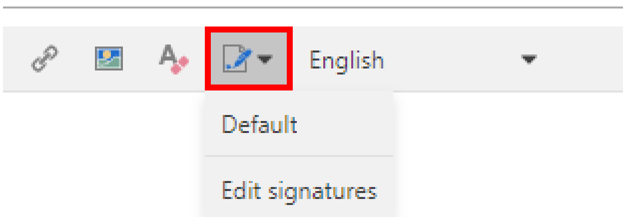


Figure 52. Insert signature

It is possible to automatically insert a signature when a new record is created. This also applies to emails that are replied to or forwarded. You can select different signatures for the two options. The automatically added signatures are called default signatures in F2. Set up your default signatures in the "Signatures" dialogue. Both are set to “None” by default.

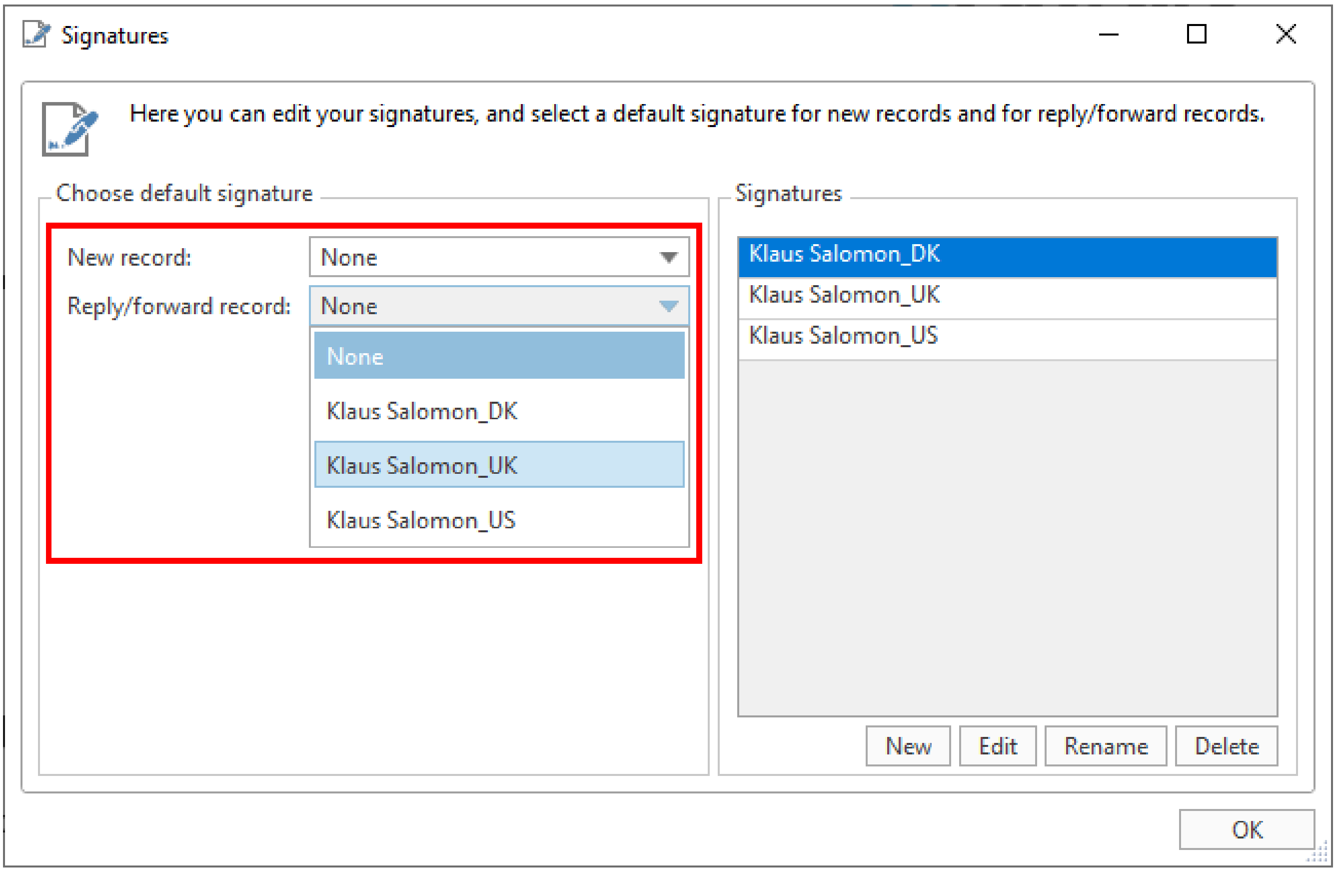


Figure 53. Select default signatures

Edit existing signatures

An existing signature can be edited, renamed, or deleted. In the "Signatures" dialogue, use the buttons **Edit**, **Rename**, and **Delete**.

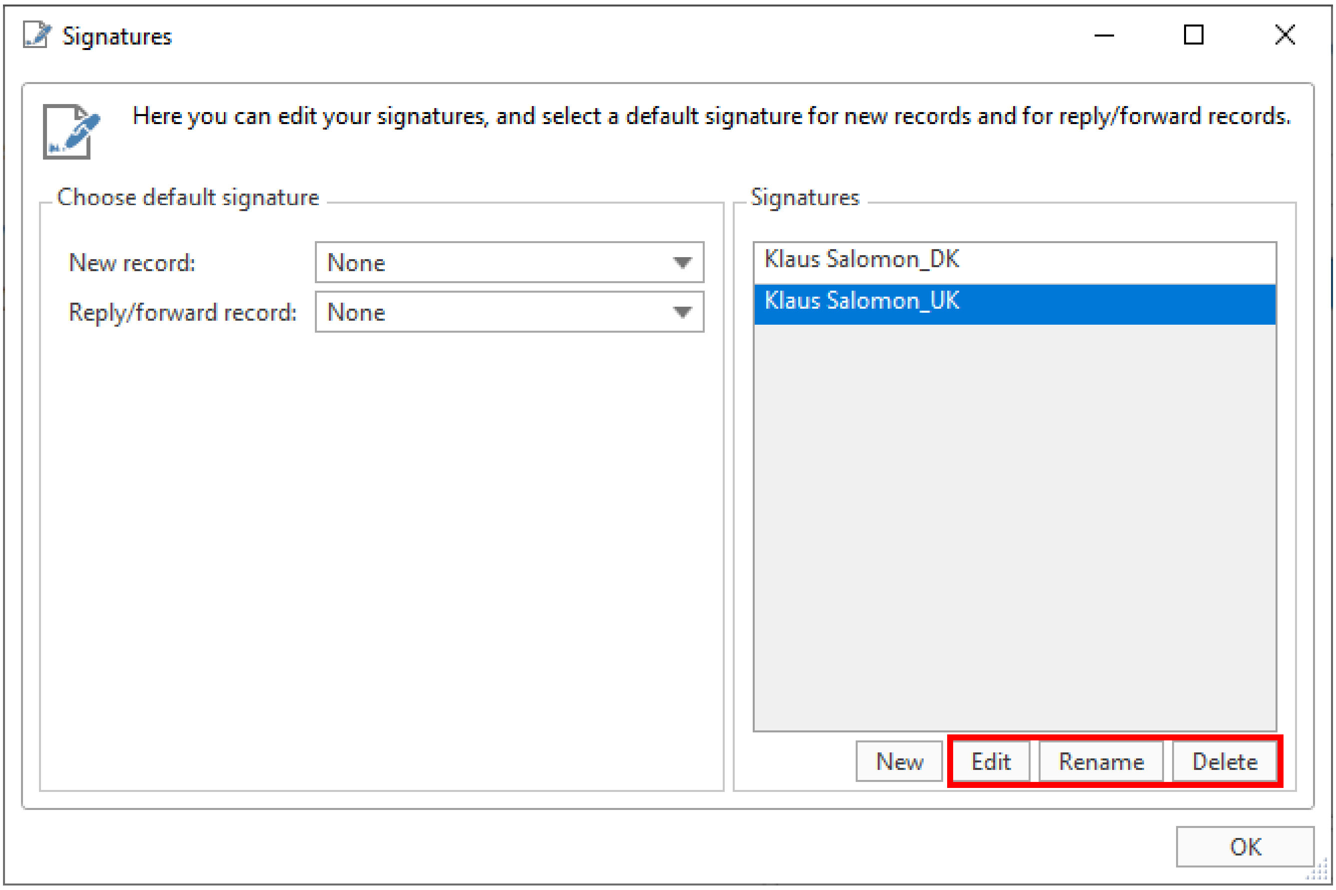


Figure 54. Edit, rename, or delete signature

There are two ways you can access the "Signatures" dialogue. Either as shown above from the “Settings” tab using the **Signatures** menu item, or by clicking **Edit signatures** directly from a record.

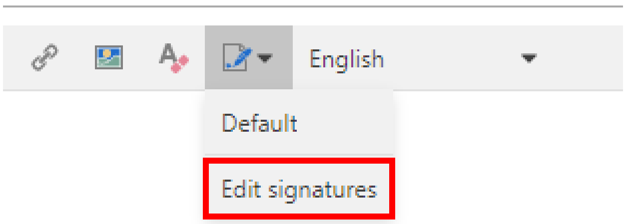


Figure 55. Edit a signature from the record window

Language

F2 is currently available in Danish, English, and German. If multiple languages are available in your organisation's F2, you can switch between them via the **Language** menu item on the "Settings" tab.

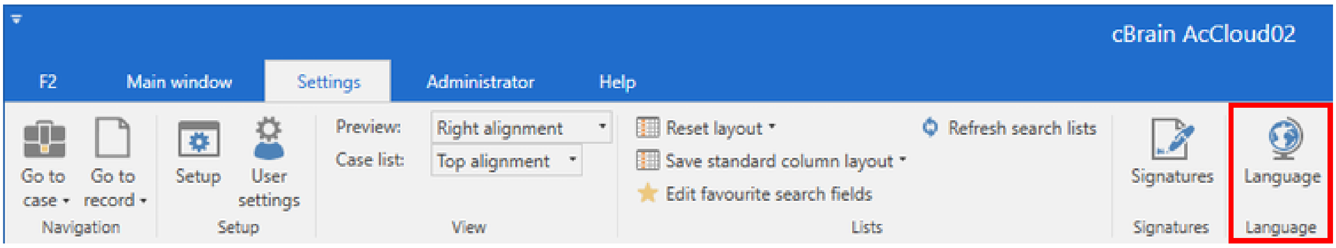


Figure 56. The menu item "Language" under the "Settings" tab

Select a language and click **Continue** to switch.

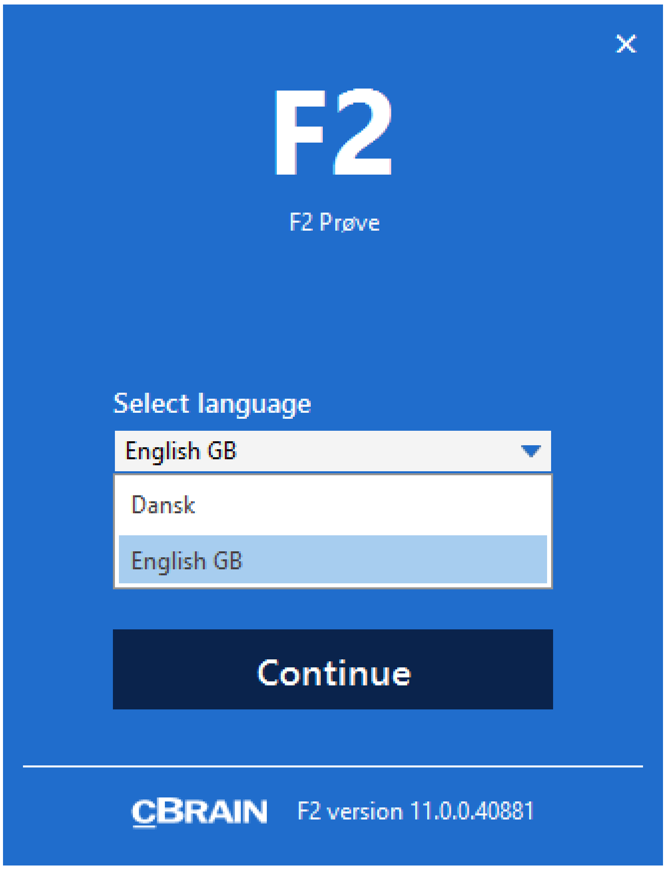


Figure 57. Select language

NOTE F2 automatically restarts when you select a new language.

Templates

The “Templates” menu group on the “Settings” tab in the main window contains all functions needed to manage an organisation’s templates.

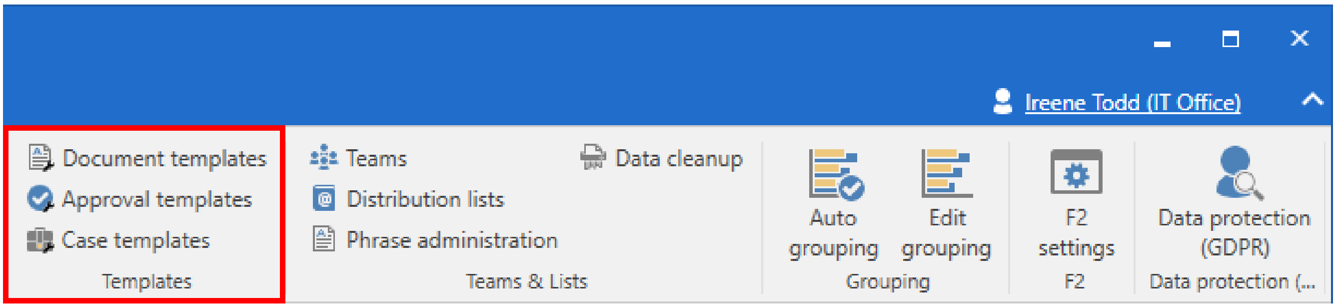


Figure 58. The “Templates” menu group on the “Settings” tab

Depending on the F2 installation and your privileges, between one and three types of templates will appear in the “Templates” menu group. From the menu group, you can manage document, approval, and case templates. This article covers document templates. Read more about the other types of templates in Create an approval template and case-template-editor/pages/create-case-template.html respectively.

Document templates

You can upload document templates that you can use to create new documents in F2. This is done via the **Document templates** menu items. The templates must be in Office format.

All users can create private document templates to use for daily work. A document template can be made available for the entire authority or for an individual unit under the authority by a user with the “Template administrator” privilege.

Click on **Document templates** to open the dialogue below. The dialogue displays all templates available to you.

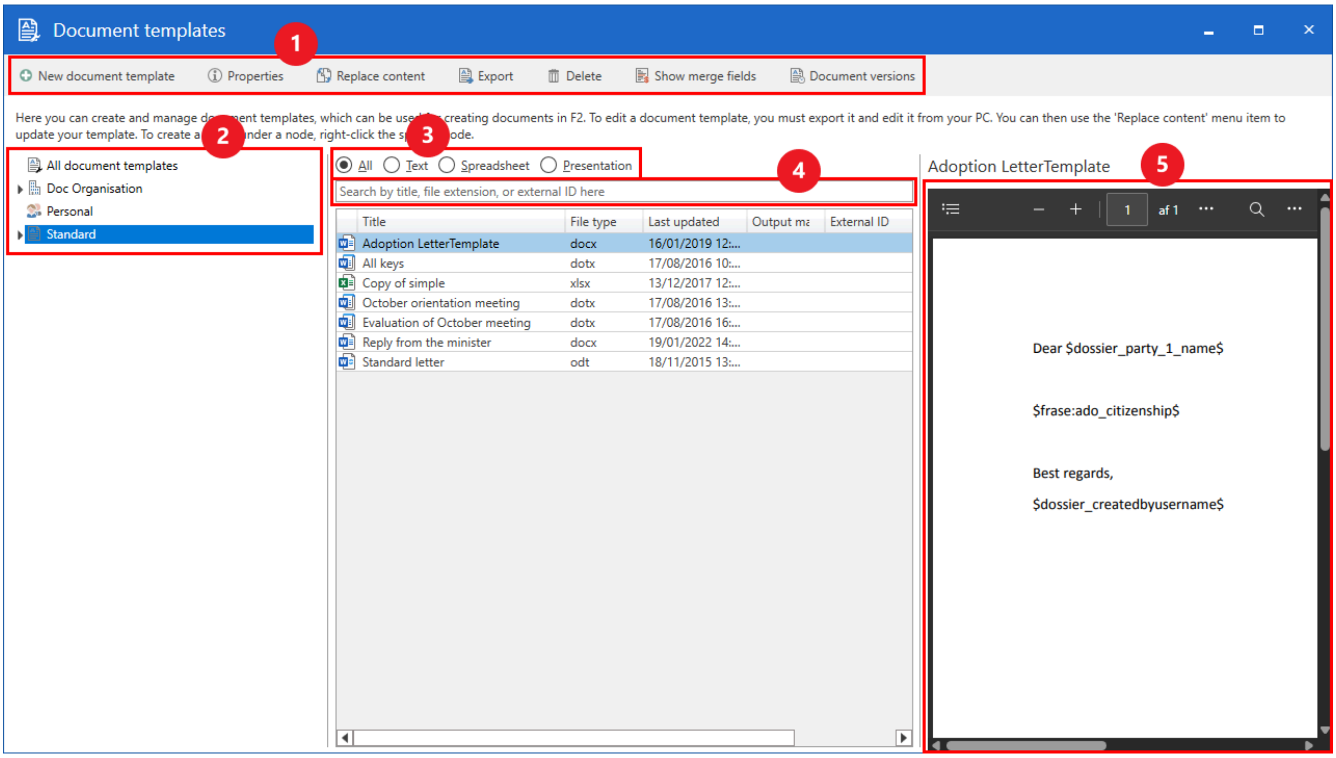


Figure 59. Template maintenance

The dialogue offers the following options:

- Manage document templates using the menu items (1).
- Select which template node to view or place new document templates in (2).
- Sort the templates by the categories "All", "Text", "Spreadsheet", and "Presentation" (3).
- Search for a specific template within the selected node (4).
- Select a document template in the list and preview its contents (5).

Menu items in the "Document templates" dialogue

The menu items of the "Document templates" dialogue support management and maintenance of document templates. The table below describes all available templates.

Menu item	Description
"New document template"	Opens the "New template" dialogue. Select which document on your computer or an external drive you want to use as a basis for the document template.
"Properties"	Opens the "Document properties" dialogue. The dialogue shows a wide range of information about the selected document.
"Replace content"	Replaces the current document template file with one from your computer or an external drive. Used in connection with editing a document template.
"Export"	Exports a copy of the document template file to your computer or an external drive. Used in connection with editing a document template.
"Delete"	Deletes the selected document template.
"Show merge fields"	Opens a dialogue where you can select a record whose merge fields you want the "Merge fields on '[record title]'" dialogue to display.
"Document versions"	Opens the "Document versions: [template name]" dialogue where you can manage the versioning of a document template.

Add new document template

Document templates for use in F2 must be created in Office and then imported. Right-click on the folder or unit where you wish to place the document template and click on **New document template**.

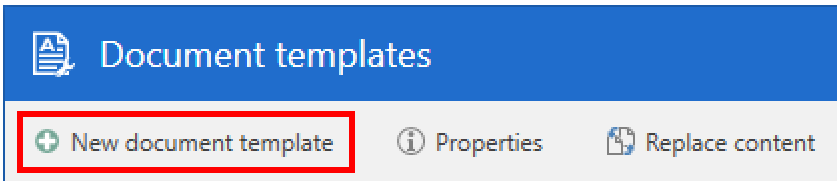


Figure 60. Create new template

The “New template” dialogue opens. Click on **Browse** to import the document you wish to use as a template.

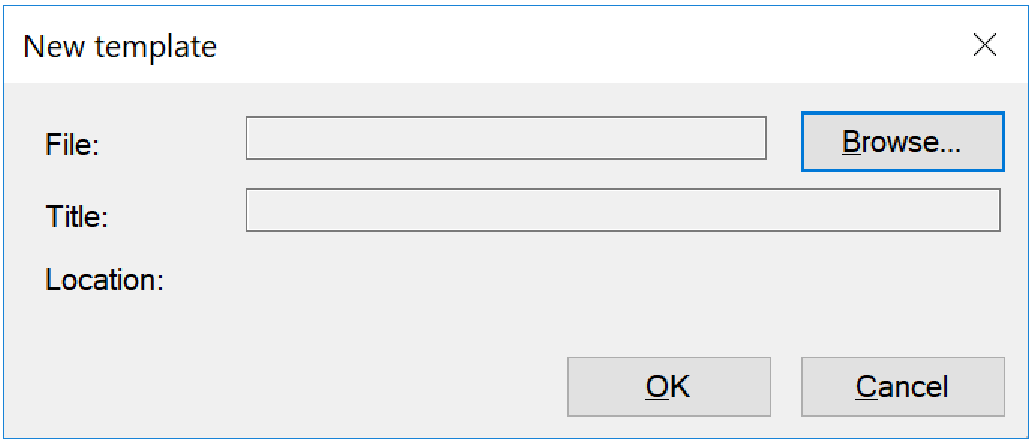


Figure 61. Add new template

Give the document template a title and click **OK** to add it.

Edit document templates

You can edit the document templates that you have created yourself. If you have the "Template administrator" privilege, you can edit all document templates in your organisation.

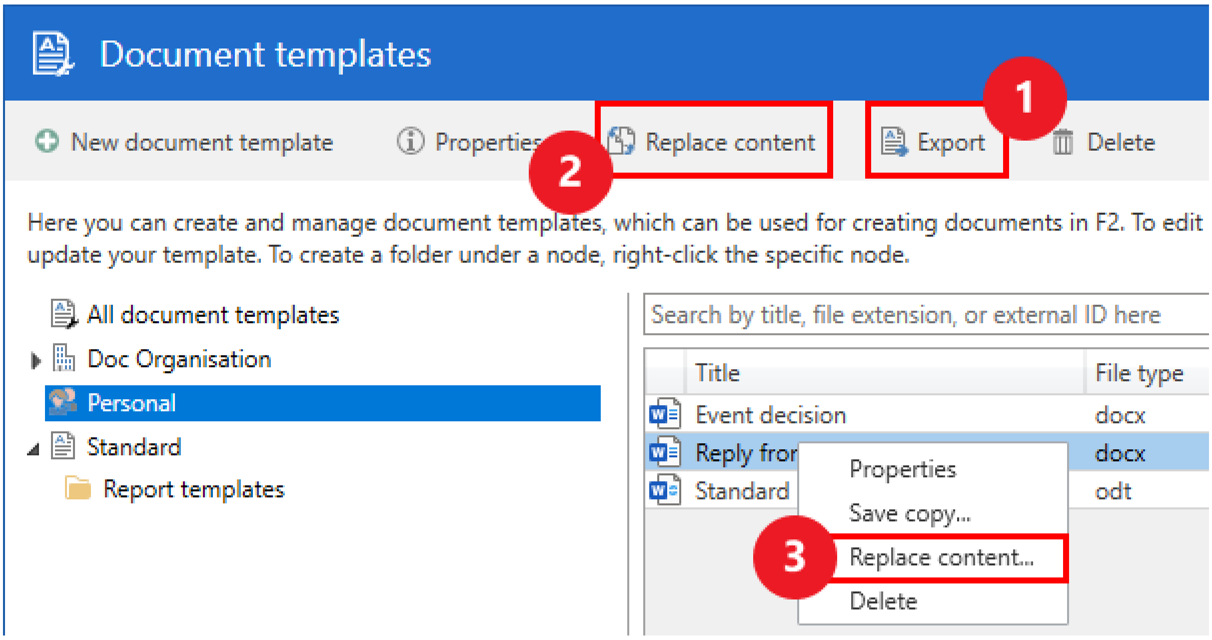


Figure 62. Export document template and replace content

Select the document template you want to edit and click on **Export** (1) in the ribbon. Open the document in a relevant program and make the changes. Then click on **Replace content** in the ribbon (2) or in the context menu (3) for the document template. Retrieve and select the edited document to replace the content in the existing document template in F2.

NOTE F2 does not ask for confirmation when you replace the content in a document template.

The document template context menu

The menu items of the context menu available on document templates are described below.

- **Properties** opens the "Document properties" dialogue, which provides information about the document template.
- **Save copy...** of the document template file, either locally or on an external drive.
- **Replace content...** of the selected document template file with a file from a local or external drive.
- **Delete** the selected document template.

The "Document properties" dialogue

The "Document properties" dialogue displays the properties from the selected document. You can edit some properties such as the title, description, and external ID.

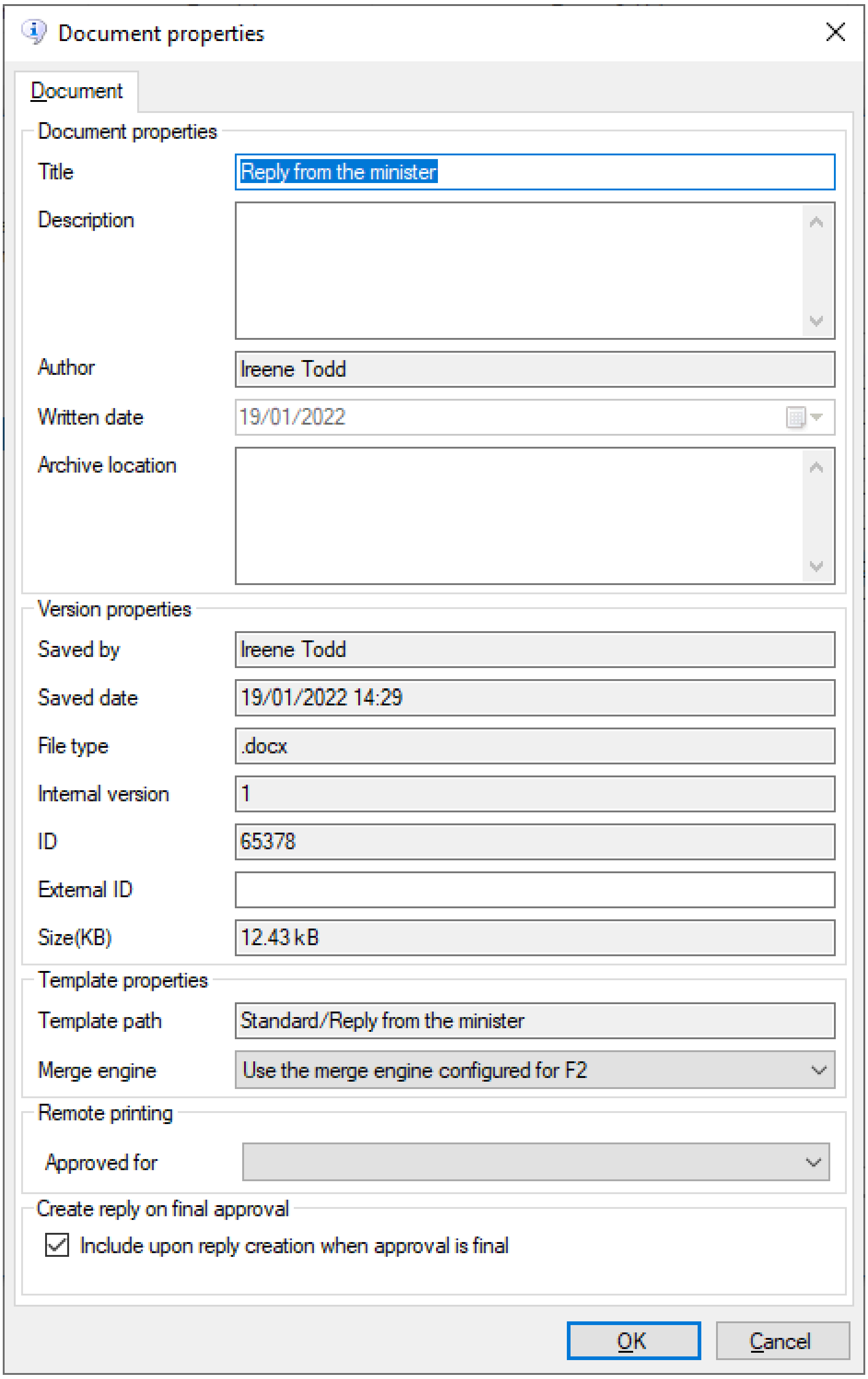


Figure 63. Document properties

The fields of the dialogue are described below.

Field	Description
"Title"	The title of the document template. You can edit this.
"Description"	A description of the document template.
"Author"	The name of the user who created the document template.
"Written date"	The date the template was created.
"Archive location"	An optional physical location.
"Saved by"	The name of the user who saved the current version of the document template.
"Saved date"	The time and date the current version of the document template was saved.
"File type"	The document template's file type.
"Internal version"	The internal version number of the current document template version.
"ID"	The internal ID of the document template.
"External ID"	You can add an external ID here. This field is used for case guides, which are part of the F2 Task Guides module.
"Size (KB)"	The size of the document template in KB.
"Template path"	The location of the document template in F2.
"Merge engine"	The merge engine used by the template. Read more about merge codes.
"Approved for"	Identifies the document that the document template is associated with. Read more about remote printing (documentation available in Danish).
"Include upon reply creation when approval is final"	Whether the document will be included in the automatically created record upon final approval in an approval flow. You can toggle this function. This requires the F2 Signed approval add-on module.

How document templates are sorted

Document templates are ordered in nodes showing which users can access them. These nodes serve as the location of the templates. In addition, the "All document templates" node shows you all the templates you can access. This means the node will not show you templates from other units, for example.

You need the "Template administrator" privilege to create document templates that are available to the entire authority or to individual units.

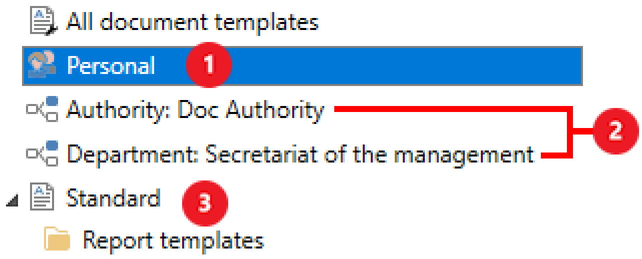


Figure 64. Document templates are ordered in nodes

Document templates are either personal (1), unit specific (2), or standard (3). The three levels of nodes are described in the table below.

Type	Description
Personal	Your private document templates only accessible to you.
Unit	Document templates available to the respective unit. A unit’s templates are also available to any subunits. This is reflected in the example in the image above: The user, who works in the Secretariat of the management, also has access to document templates from its parent node, the Doc Authority unit. The nodes are also identified by their unit type, "Authority", "Department", and "Office". This makes it easier to keep track of the hierarchical structure. The unit type is decided by a user with the "Unit administrator" privilege when the unit is created.
Standard	Standard templates in F2, available to all users.

The template node context menu

You can upload new Office templates by right-clicking on a node and selecting **Add template**. Read more about this in Add new document template. You can also create folders for organising document templates. Learn more about folders for document templates in the following section.

Folders for document templates

It is possible to create folders for organising document templates. You can create folders under the "Personal" node. A user with the "Template administrator" privilege can create folders under any node.

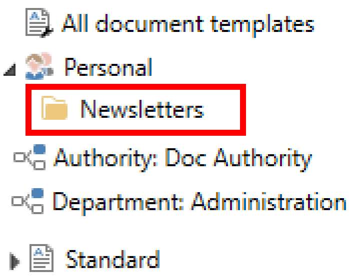


Figure 65. Folder for document templates under the "Personal" node

Create a folder by right-clicking on the node under which the folder should be created. Then select **Create folder** from the context menu and name the folder. You can now add templates to the folder by right-clicking on it and selecting **Add template**.

Rename a folder by right-clicking on it and selecting **Rename folder** in the context menu.

You can delete folders that you have created yourself. Right-click on a folder and select **Delete folder** in the context menu. You must delete the templates in the folder before you can delete the folder.

The "Show merge fields" function

You can work with merge codes in your document templates from the window.

Click on **Show merge fields** to open a search window. Select the record whose merge fields you would like to view, and double-click on it or click on **OK**. The window "Merge fields on [record title]" then opens, displaying all available merge fields for a record, its case, and its attached documents.

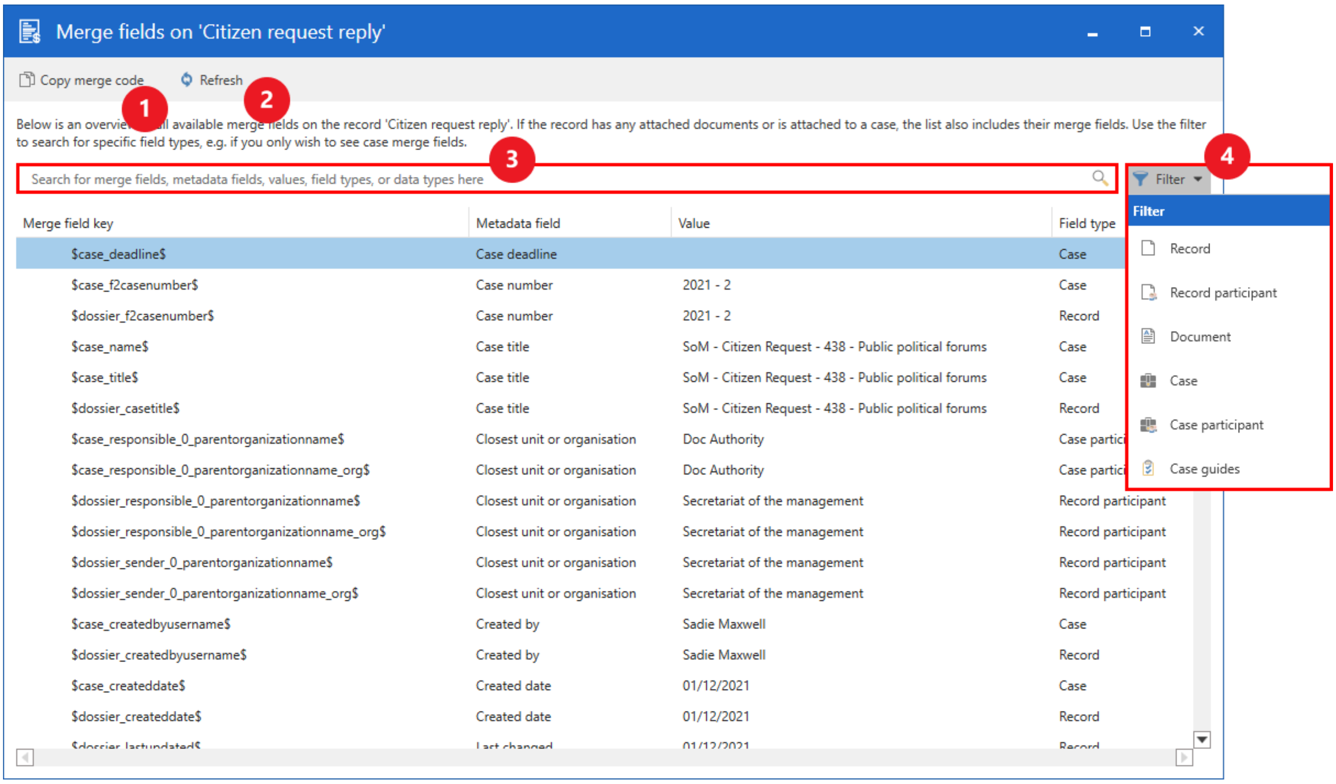


Figure 66. The "Merge fields on [record title]" window

You have the following options in the window:

- Copy (1) the merge code you have selected in the overview, or refresh the overview (2) with the latest changes to the record and its associated case.
- Search for a merge field (3).
- Filter merge fields (4) to only see one type in the overview, for example the case merge fields.

Adjust ribbons and toolbars

You can adjust the number of buttons displayed in F2's windows. This applies to both menu items in the ribbon and the "Quick access" toolbar in the main, record, and case window. You then gain easy access to the functions you need most often without having to skim through those you rarely or never use.

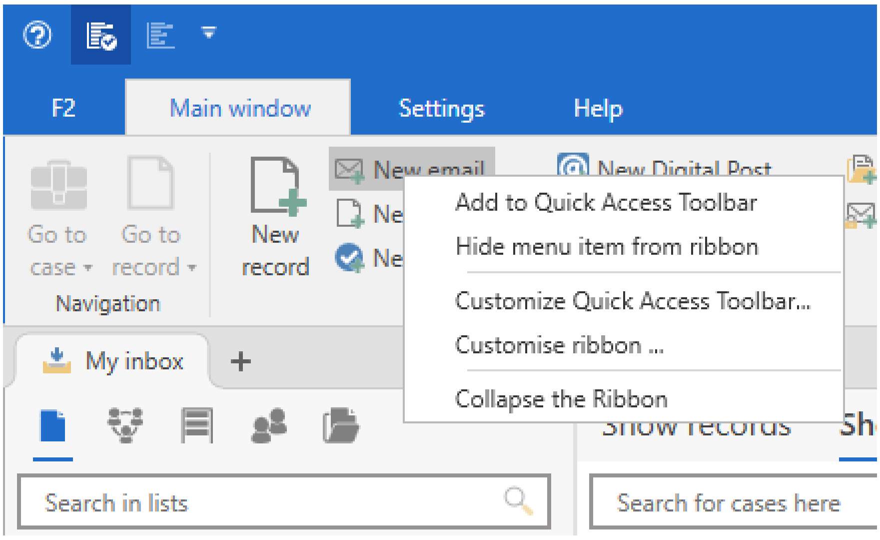


Figure 67. A ribbon item's context menu

Right-click a menu item to access the adjustment options. Here you have the following options:

- Add the menu item to "Quick access".
- Hide the menu item in the ribbon.
- Open the "Customise toolbar and ribbon" window where you can update your selection of buttons in both the ribbon and "Quick access".

NOTE Administrators in your organisation can make adjustments to buttons of multiple users or user groups through the associated user setting.

The "Quick access" toolbar

The "Quick access" toolbar is found in the upper left corner of the main, record, and case windows. You can add menu items from the ribbon to the quick access toolbar. This provides you with quick access to features you frequently use in your work within the window in question.

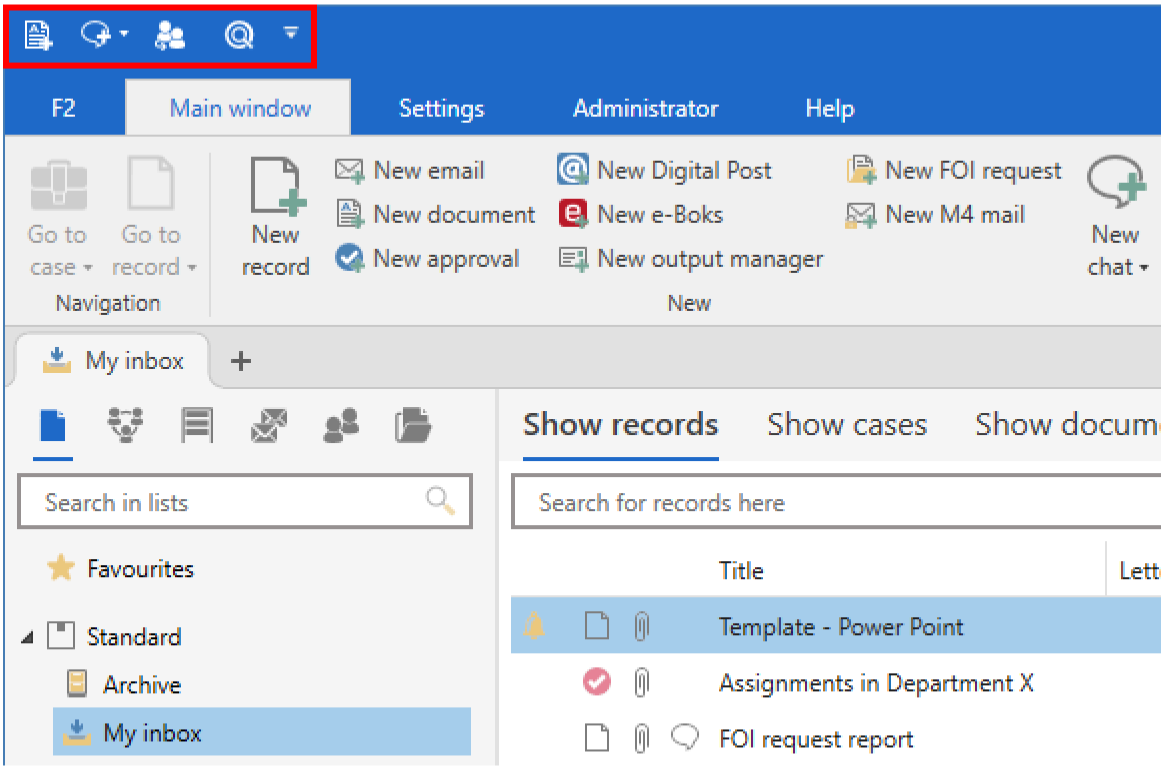


Figure 68. The “Quick access” toolbar in the main window

The toolbar is indicated by the **drop-down arrow** icon . Click the icon to open a list of suggestions of functions you can add to the toolbar, or open the "Customise toolbar and ribbon" window.

The "Customise toolbar and ribbon" window

The "Customise toolbar and ribbon" window opens corresponding to the currently open window, i.e. the main, record, or case window. At the top of the window, select which tab you wish to adjust.

In the customisation window, you can both select and deselect individual menu items or groups of menu items. Selected menu items are displayed on the right side of the window (1), while the deselected ones are shown on the left (2). You can also search for menu items using the search field on the left side of the window (3). The setup process is the same for both the ribbon and the "Quick access" toolbar.

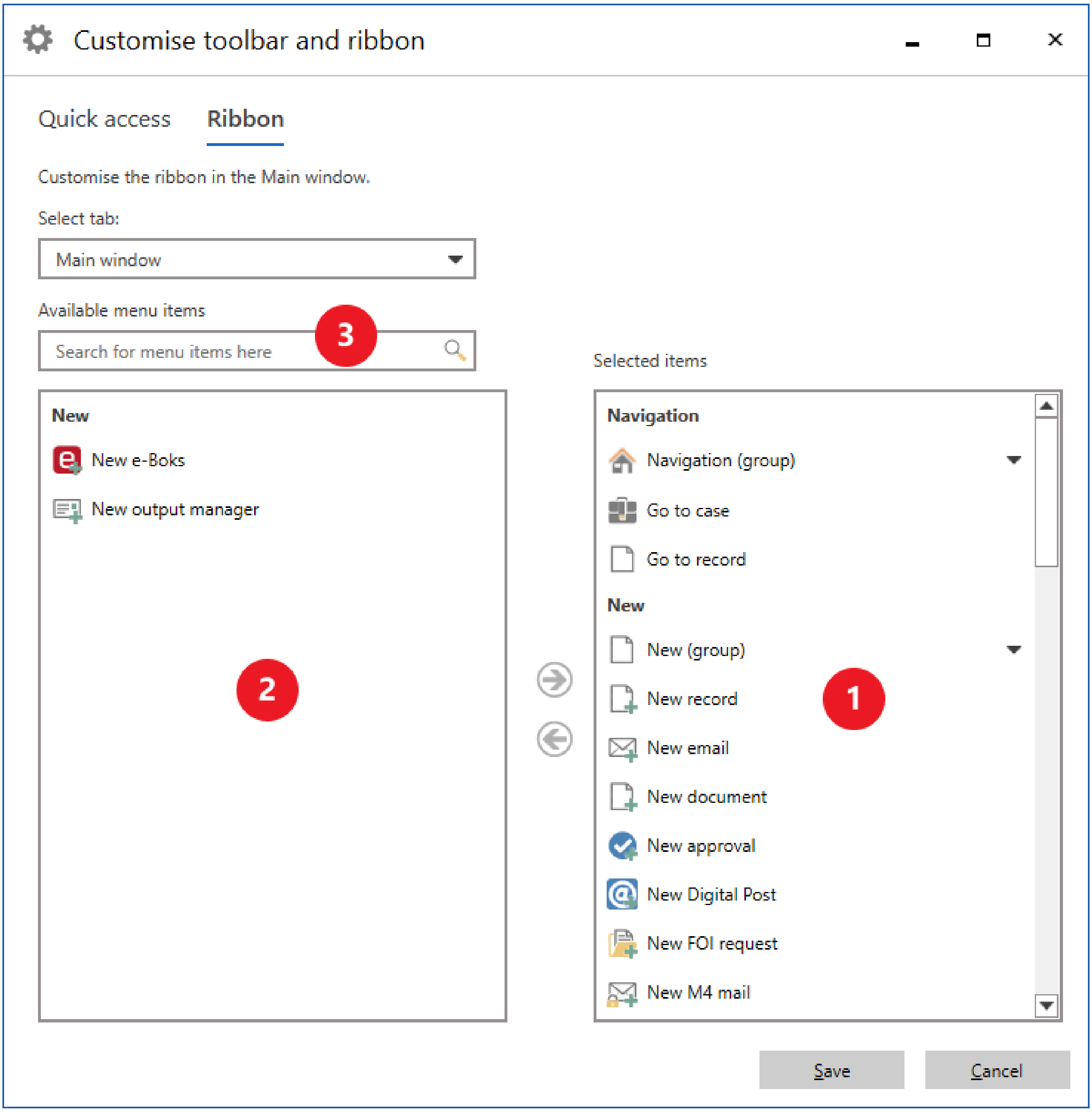


Figure 69. The "Customise the 'Quick access' toolbar" dialogue

Click on the menu items you want to select or deselect. Click on the arrows in the middle of the window to move the menu items. You can also move a single menu item by double-clicking on it. The changes take effect immediately, which means you can see them while editing.

To finish customisation, click **Save**. You can also discard your changes and close the window by clicking **Cancel**.

Reset personal settings

It is possible to reset all your personal settings during login through the “Reset personal settings?” dialogue. Open the dialogue by holding down the **Ctrl** key during login. If the role selector is shown during login, hold down **Ctrl** before clicking **Continue**. If the role selector is not shown, hold down **Ctrl** before clicking **Log in**. Hold down the key until the dialogue opens.

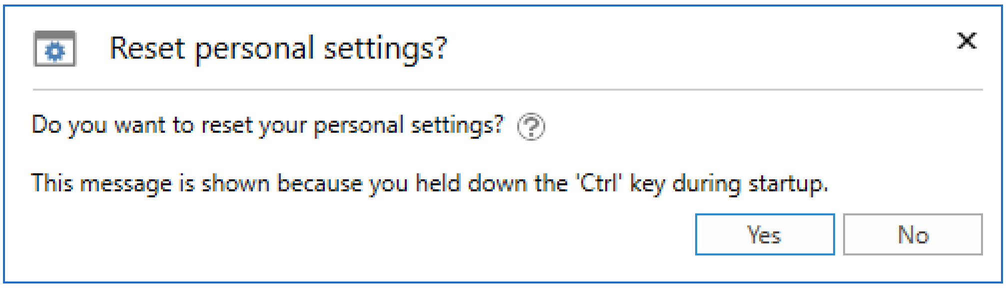


Figure 70. "The “Reset personal settings?” dialogue

All personal settings are reset when you click **Yes**. Click the question mark in the dialogue to see a list of personal settings that will be reset. The table below describes all affected personal settings.

Type	Description
General settings	• Setup from the “Setup” dialogue with the exception of “Out of office” and “On behalf of me”. • The position and size of windows. • Menu items in the “Quick access” toolbar.
Settings in the main window	• Personal grid settings. • Whether advanced search is enabled and where the case list is displayed. • The selected display mode for each list (records, cases, documents, or requests). • Favourite searches • Preview settings for different lists. • Width of the list panel. • Which lists are expanded in the list panel.
Local storage (cache) of	Local storage of: • Records • Participants, including suggestions • Cases, including suggestions • Related searches in context menus.
Misc	• Width of the panel with case folders in the case window. • Whether the ribbon is minimised in different windows. • Whether to play the start-up video, if any.

Settings and setup configuration options

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

- Enable the context menu option of viewing record documents and HTML attachments in compatibility mode for situations where emails are not displayed correctly. Note that spell checker is disabled in this mode. The configuration may be relevant for users who have disabled the "Use new record editor" personal setup option.
- Set the time zone to that of the F2 client or the server.
- Disable the option of creating a report when deleting cases. When this configuration is in effect, the associated setting is also disabled for users with the rights to delete cases.
- Toggle the visibility of the simple email settings in the “Settings” dialogue.

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