F2

Approvals

Version 5.0

Version 5.0.0.61541

Table of contents

Reading Guide

This Manual is intended for existing, new and potential users of F2 Touch. The manual contains a short introduction and a general description of the functionality and configuration of F2 Touch.

Commands (i.e. the buttons you should click on) are displayed in **Bold**. Any reference to a field or a list is displayed using "quotation marks".

If the document refers to further documentation, this is indicated in *Italics.*

The manual features a number of screenshots to help you easily find the described functions. Screenshots with lines and associated text show you where to click in F2. An area framed by a blue line identifies an area with several functions.

Enjoy!

Introduction to F2 Approvals

The F2 Approval functionality supports the need to create and complete approvals of various material. Scenarios will vary from one organisation to another, but F2 Approvals is a module to support fast and efficient quality control of the work.

F2 Approvals is used when there is a need for one or more people to approve a particular task or correspondence, for example a meeting agenda or response to a citizen or an organisation.

As a rule, anyone in the organisation can create an approval flow. This comprises defining the hierarchical steps of the flow along with deadlines for each individual step.

An approval flow is activated through a given record.

F2 Approvals has the same functionalities as F2 Submissions. Users of F2 Submissions will notice that F2 Approvals is more flexible in handling approvals.

The purpose of this Manual is to describe F2 Approvals and its uses.

An approval flow is built around two basic roles:

- *The responsible user*: The user who initiates an approval.
- *The approver*: One or more users who are involved in the approval process.

The responsible user is notified whenever the approval proceeds to the next step of the process. It is possible to change who is responsible for an approval flow after the flow has started.

An approver is tied to a certain step in the flow, and can choose to either

- Approve or
- Return, including approve under certain conditions.

The approver may also choose to add a comment. When returning an approval, the approver can also decide how he or she would like any changes to be handled.

All approvals consist of a series of approval steps. The number of steps depends on the specific type of process needed. Types of approvals can be saved as templates for reuse.

Overview of active approvals on the F2 Desktop

When this module is used, a standard search called "active approvals" is made available to the users.

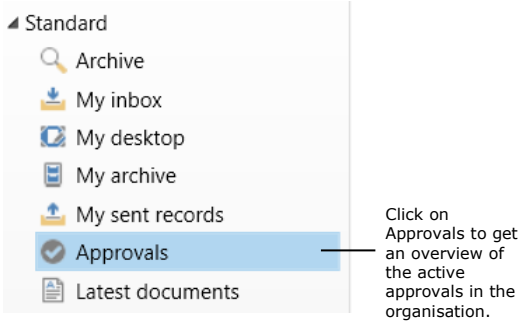


Figure 1: List of approvals

Clicking on **Approvals** will show an overview of active approval processes in the organisation i.e. approvals which have been initiated, but are not yet completed.

> **Note:** To view the approval progress for each approval in the overview, select the column "Appl: Progress" as shown in figure 2.

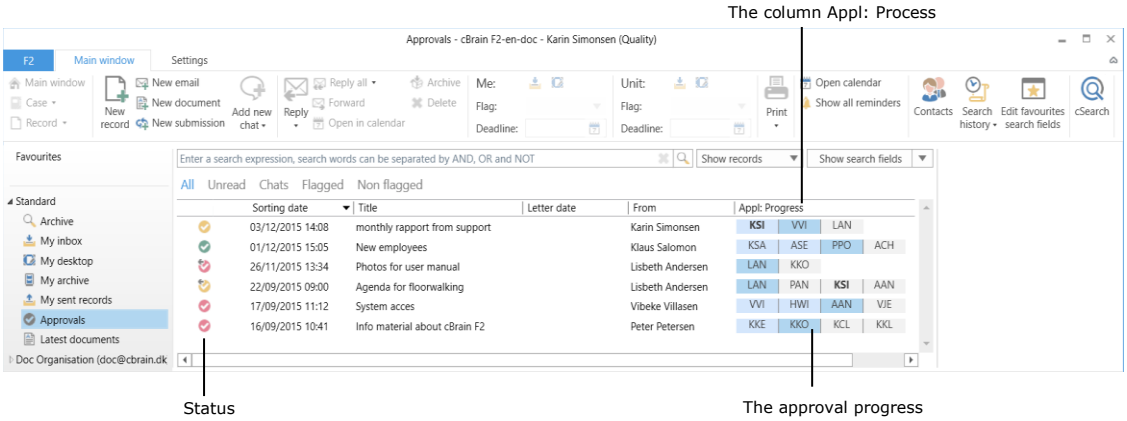


Figure 2: "Approvals"

The above figure shows the standard list "Approvals".

Clicking on the **arrow** next to "Show search fields" and then **Approval process** displays a number of search fields. These search fields are used to find, e.g.:

- My active approvals
- My completed approvals
- Every approval I have been or am responsible for
- Approval types

Approvals identified from a search can be saved as a private search list by clicking on **Save**.

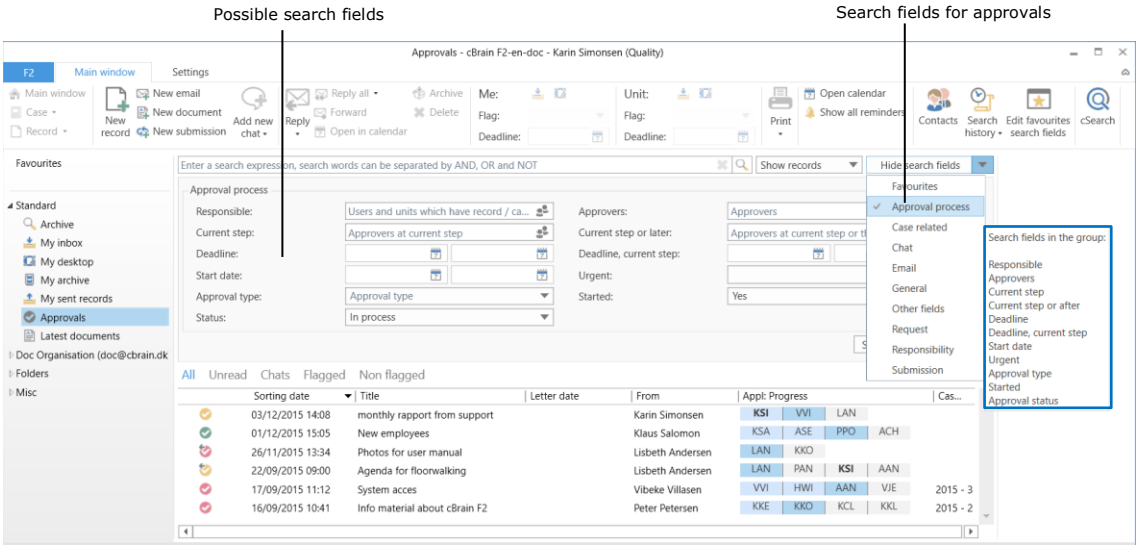


Figure 3: Advanced search options

Structure of the approval window

An approval is created by using the records menu item "New Approval" in the ribbon in the record ribbon. By clicking on **New Approval** a new tab called "Approvals" is created in the top of the record as shown in the figure "New Approval".

Approvals structure

The window for an approval is shown below.

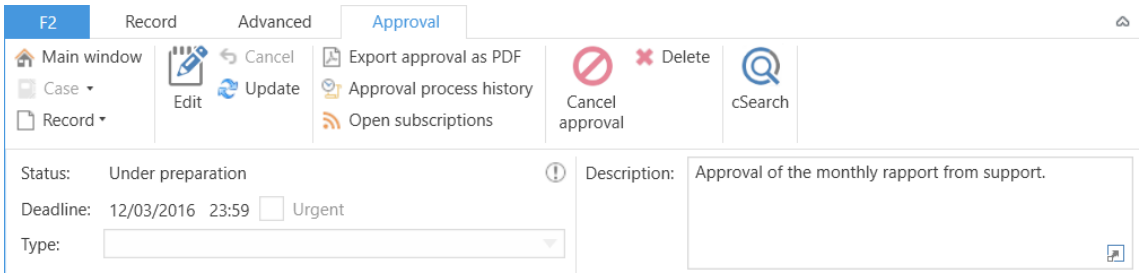
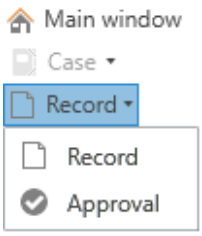


Figure 4: The approval window

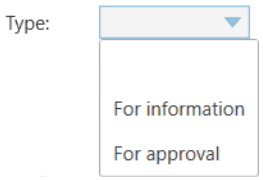
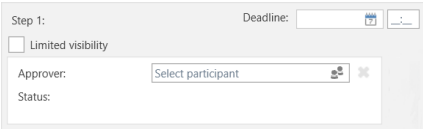
Approval menu items

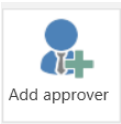
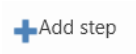
Icon	Function
	When you click on one of the three menu items, you will navigate to: • F2 Main window. • The case, which the record with the approval is placed in. • The record with the approval. • The approval window.
	Click on **Edit** to set the approval in editing mode.
	Click on **Save** to save changes to the approval.
	When an approval is edited, clicking on **Cancel** will delete the latest changes. When the approval is saved, the menu item "Cancel" will be inactive.

Icon	Function
Update	Sometimes when you work with approvals, it is relevant to update the approval. This is done by clicking on **Update**.
Export approval as PDF	Clicking on **Export approval as PDF** in the approval window creates a PDF version of the approval.
Approval process history	Approval process history shows what updates have happened and when they occurred: • Updates concerning the record • Updates concerning the attachments • When an attachment is added
Open subscriptions	Users who are not directly involved in an approval can be added as subscribers. A subscriber gets notifications in their inbox as an approval moves along the flow.
Cancel approval	The responsible user can cancel the approval by clicking on **Cancel approval**. Then it is possible to change the approval, e.g. change approvers. If an approval is cancelled, it will not be displayed in the list "Approvals".
Delete	An approval can be deleted if the user has the necessary rights.

Approval metadata

Icon	Function
Status: Under preparation	The status field informs everyone involved of the status of the approval. "Under preparation" means that the approval process hasn't been started yet.
Deadline: Deadline __:__	This field states the deadline for final approval. It is also possible to specify a specific time.
Urgent	If the responsible user wants to indicate that this approval is urgent, then the box urgent is ticked off. This field can be used for searches in F2 Desktop.

Icon	Function
	The description field is used to describe what the approval is about. Everyone involved can see this description.
	Different approval types can be established in F2 depending on the setup of F2. The approval type indicates the purpose of the approval to the approvers.
	This is a visual representation of the process status. The graphics shows who is responsible for the approval (The first initial in the overview). Dark blue indicates where the approval is. Light blue indicates that the approval has been approved at this step. Grey indicates that the flow has yet to be approved at this step. The initials are obtained from the participant registry.
	Each approval step has a number of metadata fields, which must be assigned values. Each step must have a participant that can be obtained from the participant registry. The following metadata fields can be filled in at each step: • "Deadline": A specific deadline for the approver at that step. • "Limited visibility": If this box is ticked off, the approver at that step will not be able to see the approval until it has reached their own step in the process. • "Approver": Indicates who is the approver at that step. The participant is found in the participant registry. • "Status": Is automatically filled and shows the approvals movements through the flow. • "Copy to": If another user besides the approver receives the approval in their inbox, then this is where this user is added. This participant cannot approve but capable of commenting on the approval until the approver at that step has approved.

Icon	Function
	Clicking on **Add approver** adds another approver to the step. It is possible to add an unlimited number of approvers at each step by clicking on **Add approver**.
	A new approval step is added by clicking on **Add** step. It is possible to add an unlimited number of steps by clicking on **Add step**.

Create an approval flow

The following sections describes the process of creating, processing and finalising an approval.

Step 1: Creating an approval

Approval processes are created from records. Open an already existing record or click on **New Record** to create a record.

An approval is created by clicking on **New Approval** which adds an approval tab to the record.

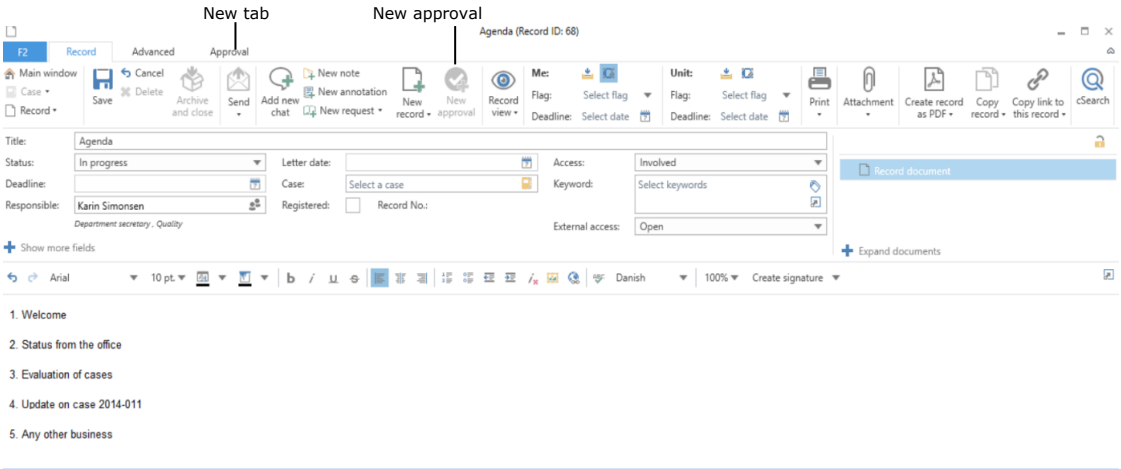


Figure 5: New approval

Step 2: Choosing an approval template

Clicking on **New Approval** opens a dialogue where you can choose the template which should be serve as a basis for the approval.

The choice here is between

- A new empty approval process
- A personal approval template
- A shared template which is accessible to everybody in the organisation (established by an administrator).

In the following example, we choose **New empty approval flow** and then click on **OK**.

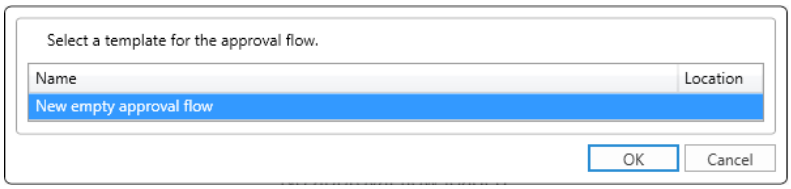


Figure 6: Choosing an approval template

This opens a new tab for the approval flow. Here additional metadata can be added.

- The main "**Deadline**" includes date and time.
- The approval can be marked "**Urgent**".
- In the box marked "description" a short explanation of the goal and general outline of the approval can be made. All approvers will see this description.
- The drop-down marked "Type" holds a number of predefined options (These options may be changed and individually defined within an organization in F2 value lists) In the following example there are two options:
    - **For your information**
    - **For approval**

These metadata fields are used to state the purpose of the approval.

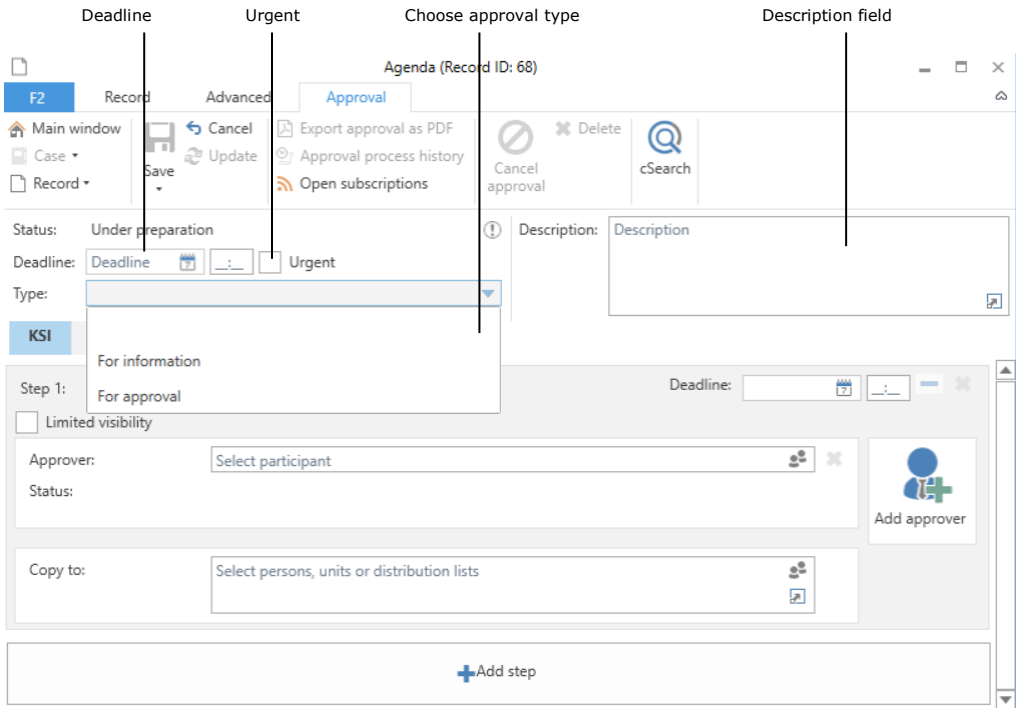


Figure 7: Specifying metadata

Deleting an approval template

It is possible for a user to delete a personal approval template in F2 by clicking on the tab **Settings** in the Main Window and then clicking menu item **Templates** which open a drop down menu. Click on **Approval templates** in the drop down menu and the following dialogue will appear.

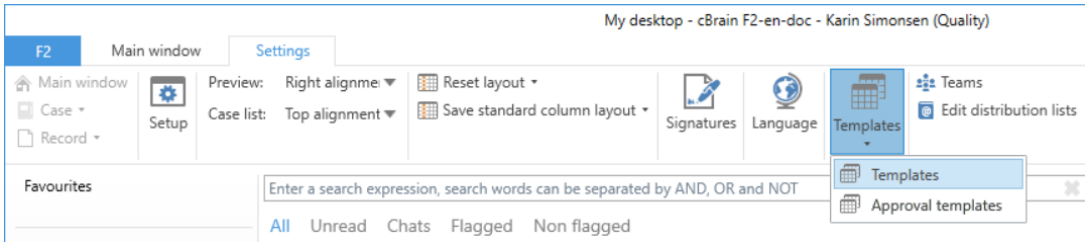


Figure 8: Opening an approval template

To delete one or more approval templates, mark the relevant templates and then proceed to click on **Delete**.

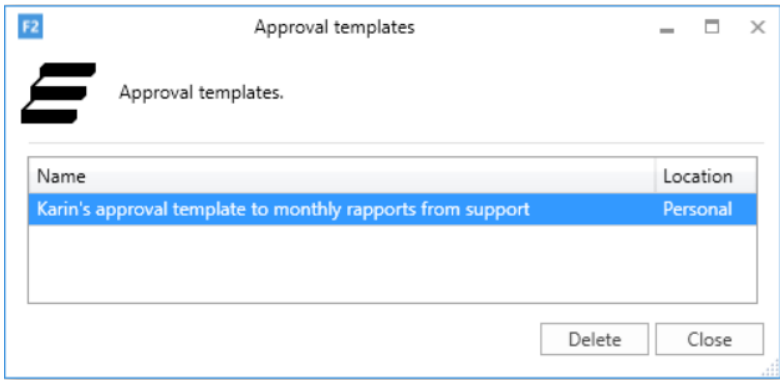


Figure 9: Deleting an approval template

The marked approval templates will now be deleted.

Step 3: Setting up the approval flow

There are no limits for the number of approvers in a given process. The decision is made by the user responsible for the approval. An extra approval step is added by clicking on **Add step.**

An approver is added either by typing the name of the wanted approver into the field marked **Approver** or by searching through the F2 participant registry. This is done by clicking on icon in the field "Approver".

It is possible to check the box marked "limited visibility". This means that the approver at this step will only be able to see the approval once it has reached their turn in the approval flow.

An approver at any step may be given an individual deadline. This function is used for managing the approval sequence and ensuring that the overall deadline can be met.

At each step, it is possible to add more than one approver. This means that all approvers at the step will have to approve before the flow moves on to the next step. Adding more parallel approvers is done by clicking on **Add approver.** More than one approver on a step is useful when more than one user on the same level needs to approve the submitted material.

The user responsible for the flow can use the field marked "Copy to" to give a copy of the approval process to additional people. A user who is sent a copy can comment on the flow and mark it as "seen".

While the approval process is set up, it is possible to remove both parallel and sequential approvers/steps. To remove an approver, the responsible user clicks on the **X** on the same line as the approver is stated. To remove the step, the responsible user clicks on the **X** in the corner of the box next to the deadline fields.

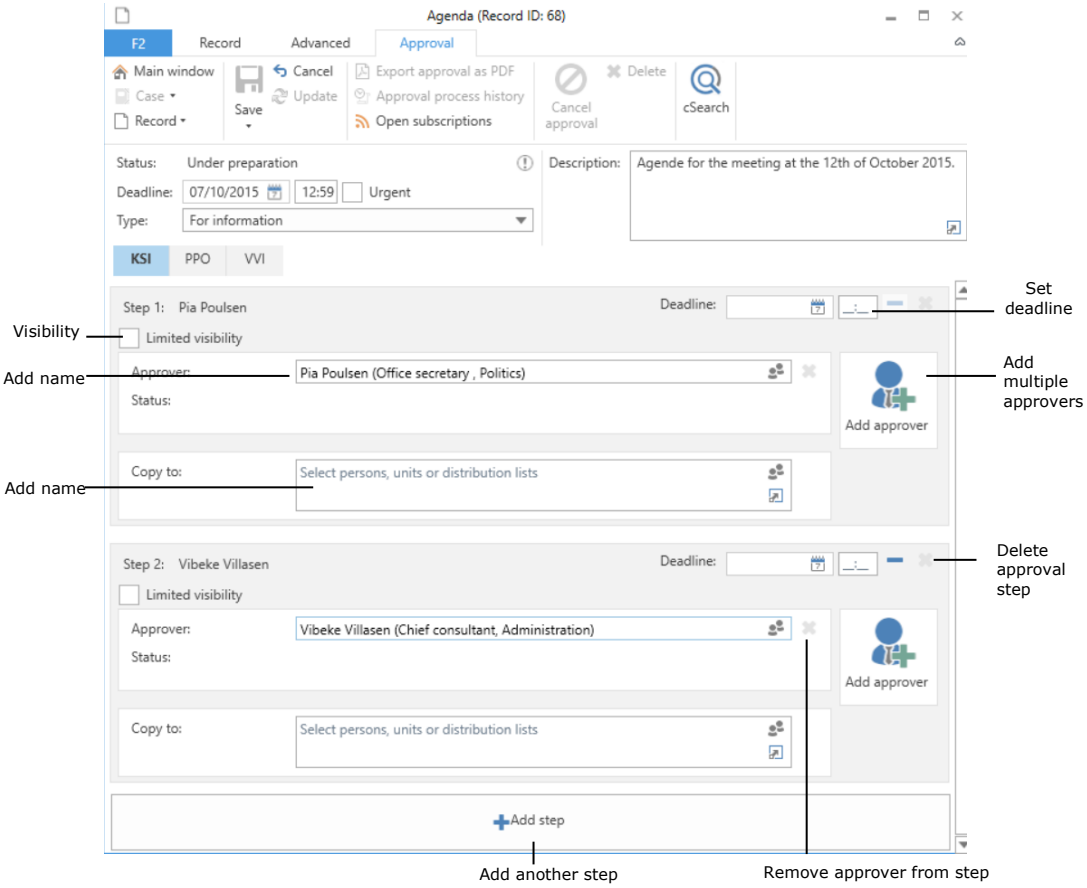


Figure 10: Setting up the flow

Step 4: Saving an approval flow as a template.

When all required steps and metadata are added to the flow, the user responsible of the flow clicks on **Save** in the ribbon menu at the top of the approval window.

If this specific setup is to be used on a later flow for more approvals, it is possible to save the setup as an Approval template. This is done by clicking on **Save as template**.

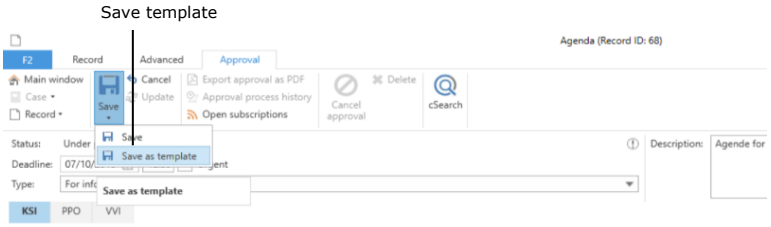


Figure 11: Saving a template

Name the template and click on **OK**.

Figure 12: Naming the template

The flow will then be saved as a personal template and can be selected whenever a new approval flow is created.

Approval overview

The process template is now saved and ready for start. A **comment** can be added to the flow that all approvers are able to see. This can be used to specify what exactly the approval should entail.

At the left side of the approvals tab shows a visual representation of the participants KSI PPO VVI. Dark blue indicates the step the process is currently in, light blue that the flow is approved at this step, and grey that the flow has yet to be approved at this step. Each step is marked with the initials of the approver at that step. Theses initials are managed within the participant register.

Clicking on + in the right end of a step displays an overview of the step.

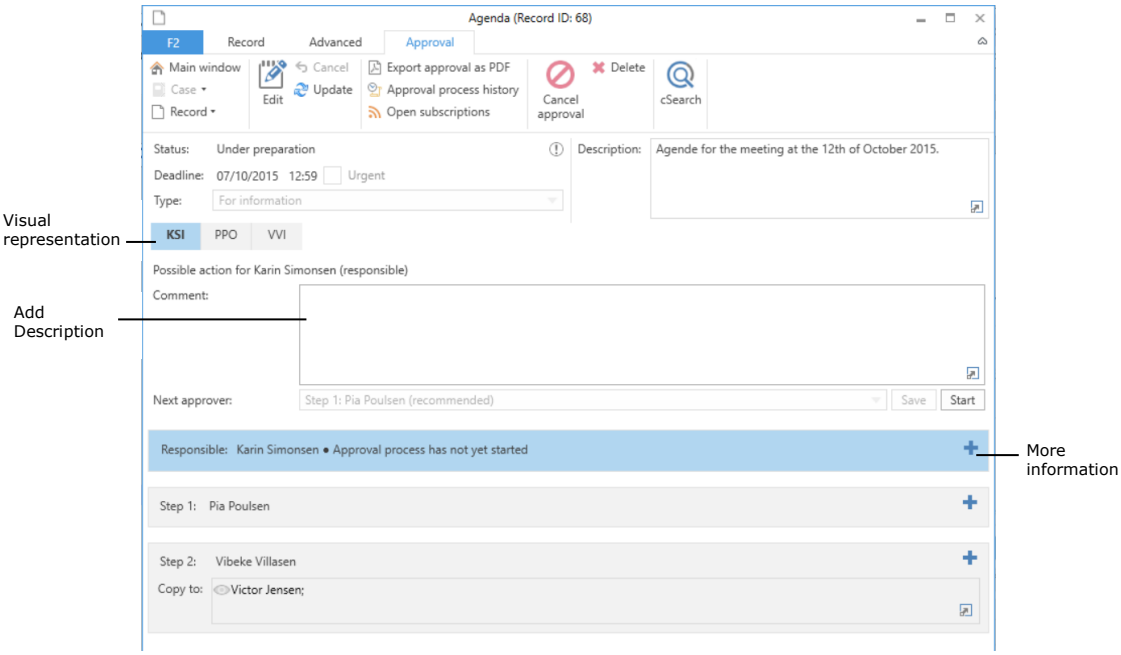


Figure 13: Approval overview

If no initials are stated in the participant register, then the first letter of the user first, middle and last name is shown. The handling and maintenance of initials is done in the participant register.

The approvals toolbar

The ribbon in the approval window comes with a set of options specific to working with approval flows.

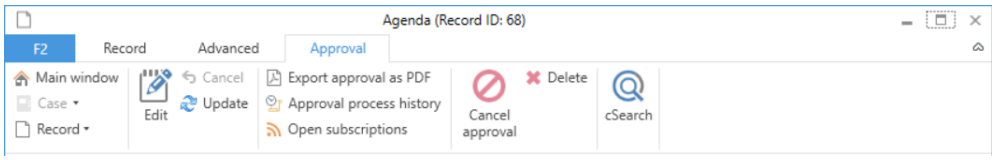


Figure 14: Approval ribbon

- **Export as PDF**: This will generate a PDF of the approval process.
- **Approval process history**: Clicking on this will show what steps the process has taken and when.
- **Subscriptions**: Here it is possible to add parties who should be notified of the status of the approval.
- **Cancel approval**: This will temporarily stop the process. It is not deleted and can be resumed.
- **Delete approval**: This will delete the approval.

Subscriptions

To make a user a subscriber, click on **Open Subscriptions** in the ribbon menu and click on **Add**. Then choose a participant or relevant participants from the participant register. Once the users are added, click on **OK**, and they will now be subscribers.

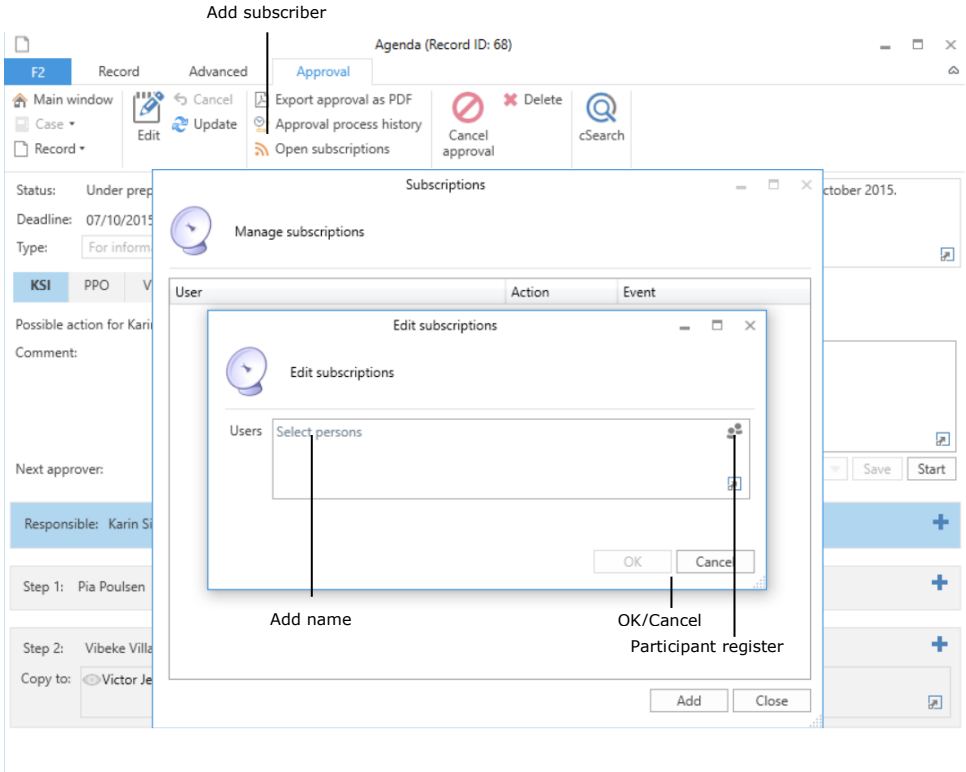


Figure 15: Setting up subscriptions

Step 5: Approval start and editing

When the approval process is ready to start, the click on **Start**.

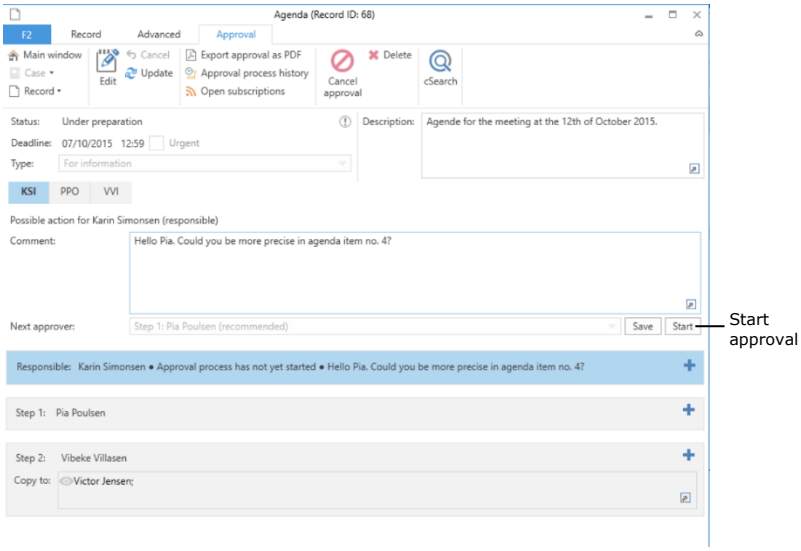


Figure 16: Starting the approval flow

The process will start and will appear in the inbox of the first approver. Information on when the flow was started along with any comments that the responsible user has logged, is shown.

The approval process window allows you to see each step and how far along the process the approval has come. The current approver is highlighted in a dark blue colour PEP PPO VVI in the status bar in the middle of the approval. Once the process has commenced, it is no longer possible to delete the flow.

The approval responsible can still change the process flow by clicking on **Edit the flow**. However, it is only possible to edit subsequent approvers. (This will not be possible if the final approval has been given.)

The approval responsible can revoke the approval by clicking on the **Blue arrow** .

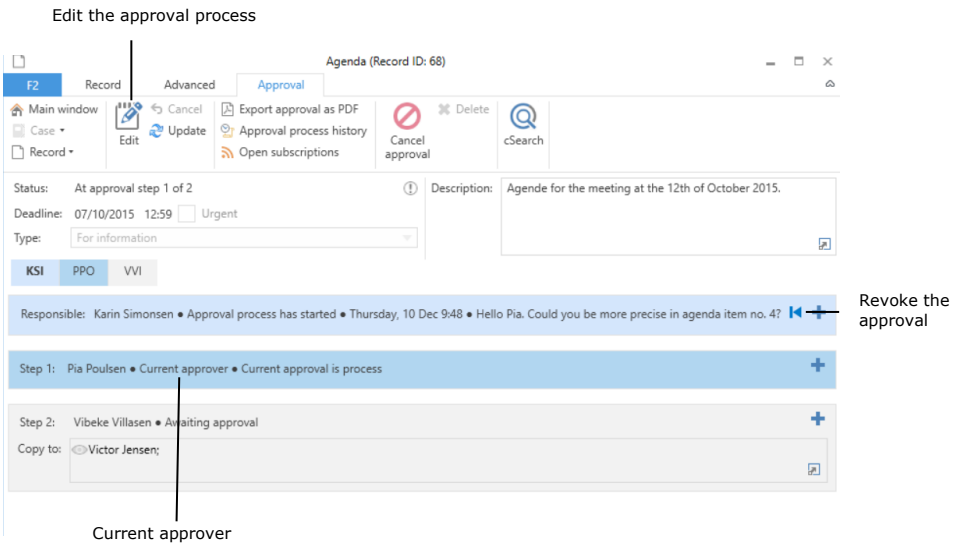


Figure 17: Editing the approval flow

Step 6: Receiving an approval

Approvers at the current step will receive a notification in their inbox. The icon indicates that it is an approval. Mouse over the icon will reveal:

- Who created the process.
- When it was created.
- The step the approval is currently on.
- Who still needs to approve.

The green colour on the approval icon indicates that the deadline is more than 7 days away.

A yellow icon indicates that the deadline is in less than 7 days.

A red icon indicates that the deadline has passed.

Double click on the approval icon opens the record. Attachments and metadata will be shown in the record.

To gain access to the approval process, the approver must click on the tab **Approval** in the top part of the record.

Step 7: Approving or returning

After receiving the approval, the approver has two options, either:

- **Approve** or
- **Return**

If the approver chooses to approve, this is done by clicking on **Approve**. It is possible to attach a comment to the approval before clicking on **Approve**. This comment will be visible to all approvers after the current step has been approved. Following the approval, the flow will continue to the next step, and the next approver will receive a notification in their inbox.

If the approver does not approve, it is possible to return it by selecting **Return**.

When clicking on **Return**, the current approver must specify the following:

- Who to return the approval to, any previous step may be chosen.
- How the flow process should be resumed after update.

Select the step the approval should be returned to in the field "Return to". Any step before the current step may be selected.

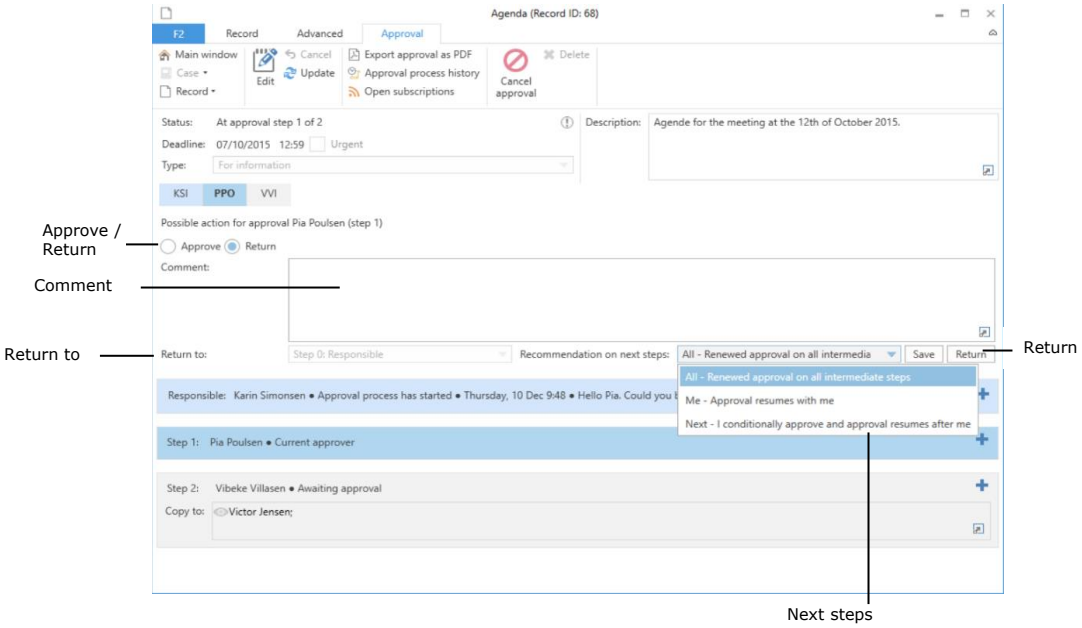


Figure 18: Returning the approval

How the approval flow is going to proceed is chosen in the field "Recommendation on next steps:" The following options are available:

- **All – Renewed approval on all intermediate steps**: This will start the approval process from the beginning, and must be approved again at all steps.
- **Me – Approval resumes from me**: If this is chosen, the flow will return to the user responsible for the flow and then resume with the approver that returned the flow.
- **Next – I conditionally approve and approval resumes after me**: The process will return to the responsible user and resume thereafter at the approver who follows the current approver.

When a flow is returned, it is possible to attach a comment indicating why the flow was returned, and what may need to be changed. This comment will only be visible to others after the approver clicks on **Return**.

Step 8: An approval is returned

The approval will now be returned to the responsible user. The responsible user receives the returned approval in his or her inbox with the icon returned that indicates that the approval has been returned.

To open the record with the approval, double clicking on the approval icon and then click on the **Approval** tab. The responsible user can now see that the approval at step 2 is awaiting a revised version, and a comment on what should be updated is included.

The field "Next approver", shows a recommendation about the step the approval should be resumed at. The responsible user has the option to set the first re-approver to start one step before the recommended step.

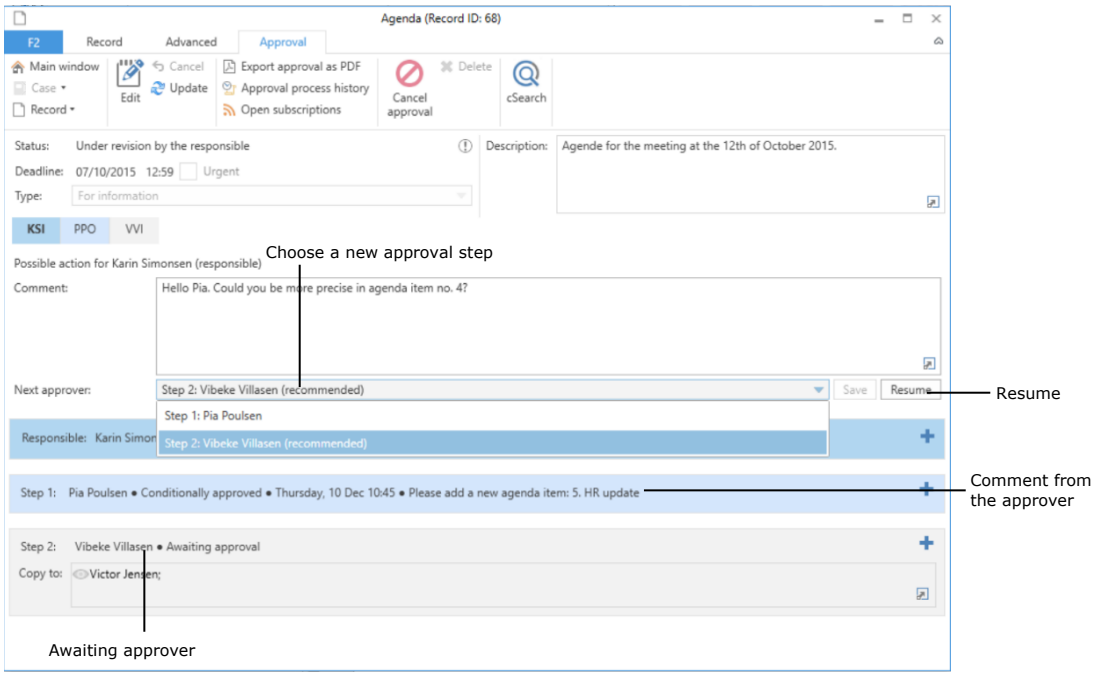


Figure 19: Restarting an approval

Once the required changes are made, the responsible user clicks on **Resume** and the process continues.

The approval is sent directly to the awaiting approver on step 2 as recommended and the approver on step 1 is skipped.

The approver on step 2 receives the corrected record and can as the first approver choose between **Approve** and **Return**.

Receiving an approval as a copy recipient

Sometimes it may be desirable to send a copy of the flow to a user who is not an approver.

In this case, the user receives the flow in the inbox. Although it will not be possible to approve or return the flow, the user will be able to comment on it and to either

mark the flow as seen or mark it as seen and inform the user responsible for the flow.

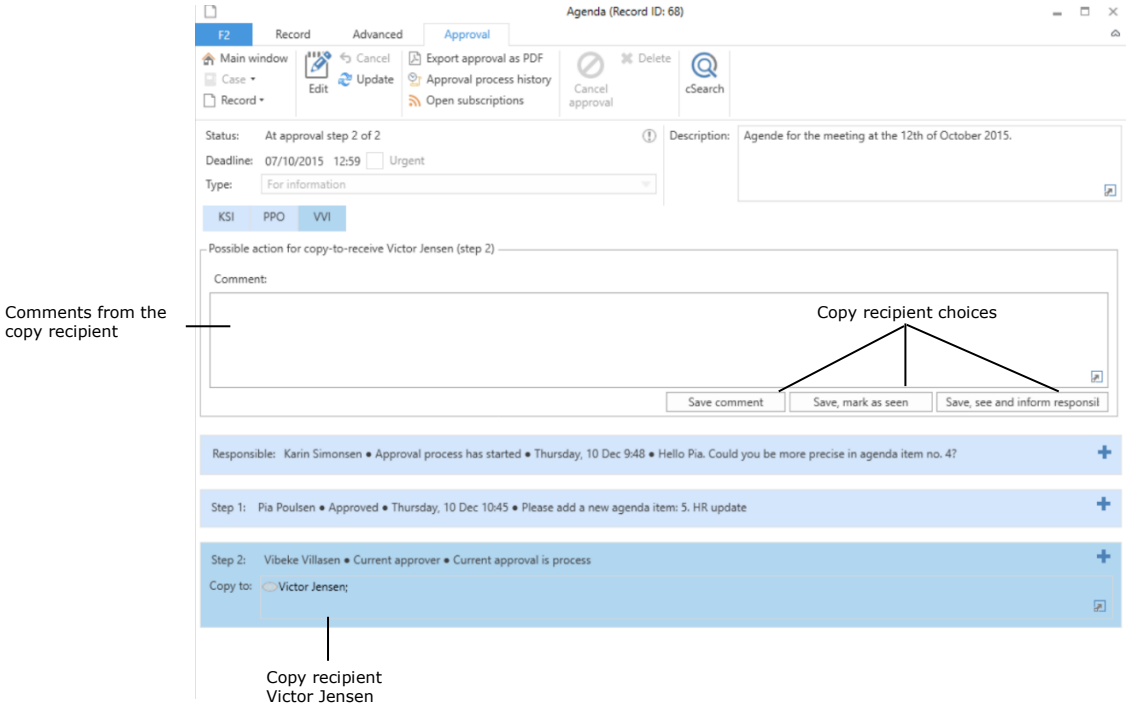


Figure 20: Copy recipient choices

A copy recipient has the following options:

- **Save comment**: Save comment as a draft
- **Save, mark as seen**: The approval has officially been seen and there has possibly been added a comment.
- **Save, see and inform the responsible user**: Officially seen, possibly with added comments, and the responsible user has been notified that the approval has been seen and commented upon.

Once the above actions have been performed, an "eye"- symbol will be displayed left of the name of the copy recipient. To open the dialogue box "'Seen' details", right-click on the copy recipient's name and then **See details**.

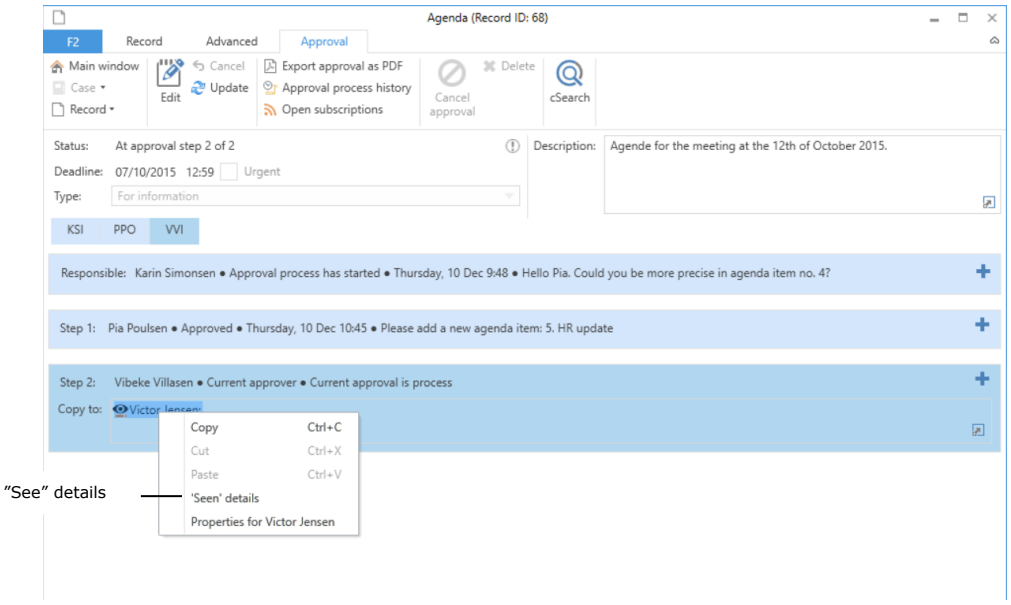


Figure 21: Right-click to find "Seen detail"

A dialogue will now open with the details of who and when, along with the comment regarding what has been seen.

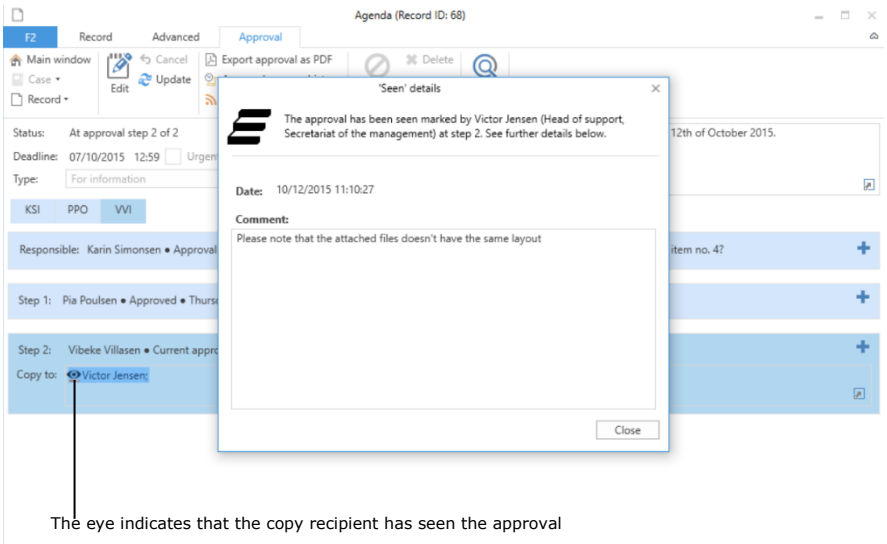


Figure 22: Dialogue with the comment from copy recipient

The above actions can only be performed before the approver at the respective step has approved the approval. The user to whom a copy was sent can subsequently not edit the approval anymore.

Step 9: Completing the approval process

The responsible user is giving notice to his or her inbox. The approval icon will be highlighted in dark grey with a green checkmark indicating that the approval has been approved: .

Moussing over the icon will reveal that the approval is completed and finally approved.

Preview options

As previously mentioned, it is possible to view active approvals on the desktop by clicking on the list **Approvals** in the main window. If a preview is active on in the main window, it is possible to view both the record and the approval steps.

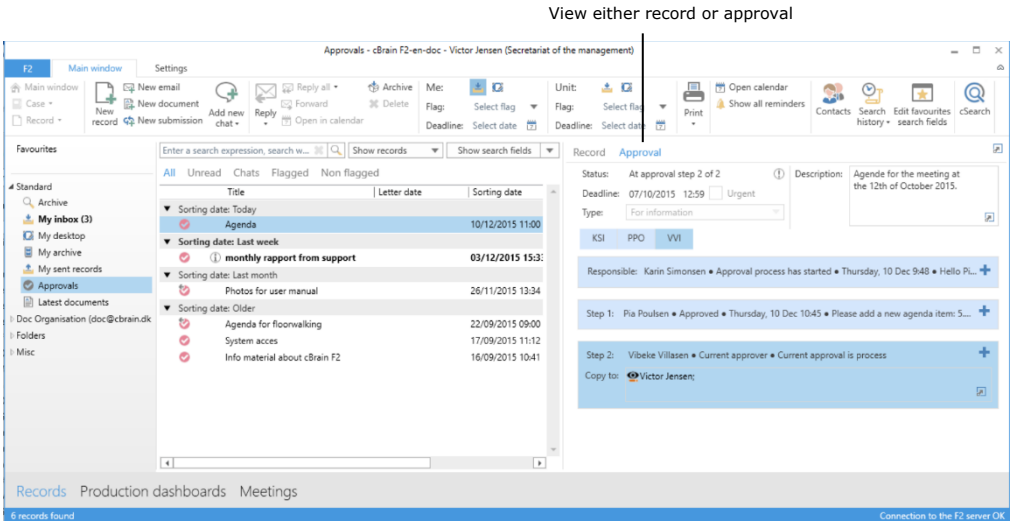


Figure 23: Preview options

Approval history and version control

Clicking on **Approval process history** provides an overview of the approval process from beginning to end. The drop-down menu gives a visual representation of the process where each step in the process has a line with time, date and the process. The blue mark shows the approval process flow.

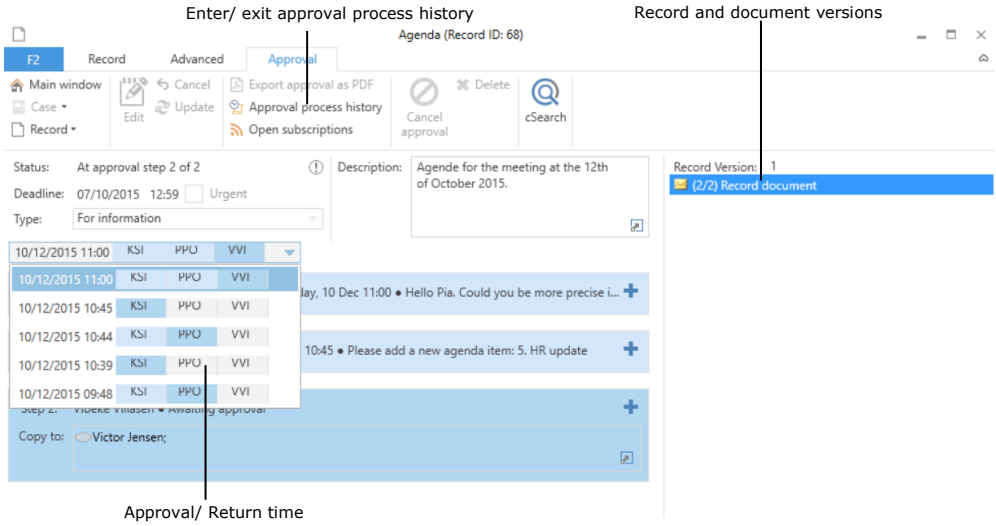


Figure 24: Approval history

Clicking on one of the steps will display the approval the way it looked in that step.

The user can see an overview of the record at the time, showing the attached documents, as well as what version of the record was active at that step. In this way it is possible to be very precise about what version of a document was seen and approved by an approver.

The settings offer the option to set up when F2 should automatically create a new version. This happens by default when someone other than the responsible user makes changes. This mean that F2 will create a new version of the record and attachments every time an attachment is updated or the record is changed.

When the record is created and changed the record version on the approval will be (2/2). The same applies when a document is created.

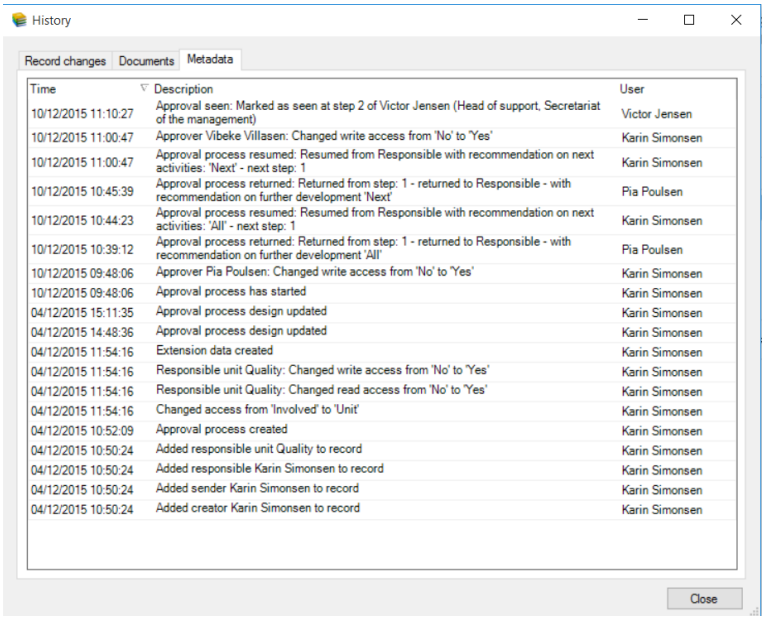
The approval history gives an overview of the approval. It is easy to see the different versions of the approval and how records and attachments are changed throughout the approval. To see the first version of the record, click on action one in the approval process. It is possible to open the attachments and see the original version.

To see the final version of the record, click on the latest action in the approval process.

Approval using F2 Manager

An approver may **Approve** or **Return** an approval through F2 manager using an iPad. As F2 manager can be used while offline, the action will only be in effect once F2 manager is back online, and the moment of reconnection will be shown as the moment of approval/return (time stamp) in the approval process history.

The time stamp shows when the iPad is reconnected and the approval is registered. The time stamp doesn't show when the approval was made when the iPad was offline.



Time	Description	User
10/12/2015 11:10:27	Approval seen: Marked as seen at step 2 of Victor Jensen (Head of support, Secretariat of the management)	Victor Jensen
10/12/2015 11:00:47	Approver Vibeke Villasen: Changed write access from 'No' to 'Yes'	Karin Simonsen
10/12/2015 11:00:47	Approval process resumed: Resumed from Responsible with recommendation on next activities: 'Next' - next step: 1	Karin Simonsen
10/12/2015 10:45:39	Approval process returned: Returned from step: 1 - returned to Responsible - with recommendation on further development 'Next'	Pia Poulsen
10/12/2015 10:44:23	Approval process resumed: Resumed from Responsible with recommendation on next activities: 'All' - next step: 1	Karin Simonsen
10/12/2015 10:39:12	Approval process returned: Returned from step: 1 - returned to Responsible - with recommendation on further development 'All'	Pia Poulsen
10/12/2015 09:48:06	Approver Pia Poulsen: Changed write access from 'No' to 'Yes'	Karin Simonsen
10/12/2015 09:48:06	Approval process has started	Karin Simonsen
04/12/2015 15:11:35	Approval process design updated	Karin Simonsen
04/12/2015 14:48:36	Approval process design updated	Karin Simonsen
04/12/2015 11:54:16	Extension data created	Karin Simonsen
04/12/2015 11:54:16	Responsible unit Quality: Changed write access from 'No' to 'Yes'	Karin Simonsen
04/12/2015 11:54:16	Responsible unit Quality: Changed read access from 'No' to 'Yes'	Karin Simonsen
04/12/2015 11:54:16	Changed access from 'Involved' to 'Unit'	Karin Simonsen
04/12/2015 10:52:09	Approval process created	Karin Simonsen
04/12/2015 10:50:24	Added responsible unit Quality to record	Karin Simonsen
04/12/2015 10:50:24	Added responsible Karin Simonsen to record	Karin Simonsen
04/12/2015 10:50:24	Added sender Karin Simonsen to record	Karin Simonsen
04/12/2015 10:50:24	Added creator Karin Simonsen to record	Karin Simonsen

Figure 25: History of the record

For more detail information on how to use approvals with F2 Manager check the *F2 Manager – Quick Guide: Approvals.*

List of figures