

F2

FOI Request, Advanced

Version 7



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Reading guide

This manual is written for users of F2 FOI Request, Advanced.

The manual contains a short introduction to F2 FOI Request, Advanced and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

The manual is based on an F2 solution with all available add-on modules installed. Users may notice some differences between their own F2 client and the one presented here depending on the add-on modules included in their organisation's F2 solution.

In this manual, the names of commands are **bolded**. Commands are clickable features such as buttons. The names of fields and lists are placed in "quotation marks".

References to other sections within the document and references to other documentation are *italicised*.

We hope you enjoy using F2.



Introduction to F2 FOI Request, Advanced

The add-on module F2 FOI Request, Advanced meets the need to efficiently gather and create the basis for an FOI request report. The module supports quick and effective identification and administration of the records and cases that will form the FOI request.

F2 FOI Request, Advanced makes it easy to create an FOI request report that contains material from selected cases, records, and documents. The module supports the entire process – from the received FOI request to the complete FOI request report.

The module helps the user select the elements that the FOI request report needs to contain. The user can perform the following actions:

- Add content to the FOI request report on an ongoing basis using searches or former FOI request reports.
- Include, remove or edit FOI request elements such as documents, annotations, and requests along with adding comments and extracting sensitive information.
- View ongoing and completed FOI request reports in the main window.
- Save and send FOI request drafts for internal approval.

The first step of generating the FOI request report is selecting the relevant records. The contents of the report can then be adjusted by deselecting records and documents before the final version is created.

F2 FOI Request, Advanced ensures a complete overview so that the requester can see if anything has been left out.

Comments can be added to all individual FOI request elements. This makes it possible to document why parts of the material may have been excluded.

F2 FOI Request, Advanced automatically generates a complete FOI request report once the relevant FOI request elements are selected. The amount of details to be included in the report can be adjusted. For example, the attached documents may be given individual titles or the report can be adjusted so that it contains all the relevant metadata and documents.

F2 provides a number of options for setting up the FOI request report. However, it is up to the organisation to determine the final setup of its FOI request reports.

F2 Data protection is an add-on module that can be bought for F2 FOI Request, Advanced. F2 Data protection helps the organisation select the elements that a personal data request must contain. The organisation selects a user who can use the module to search for, assess and select the material for the personal data request.



Working with FOI requests

This section provides an introduction to working with FOI requests and describes the "FOI" tab in the case window along with its associated functions and fields.

New FOI request

An FOI request is created as a case in F2. Select one or more records in the main window's result list and click on **New FOI Request** in the main window's ribbon or use the context menu and select **New** and then **FOI**.

It is not necessary to find all the needed records before the FOI request is generated as records can be added afterwards as well.

When a record is added to an FOI request, all its attached elements such as documents, annotations and requests are added to the basis of the FOI request. Chats and notes on the record are not included.

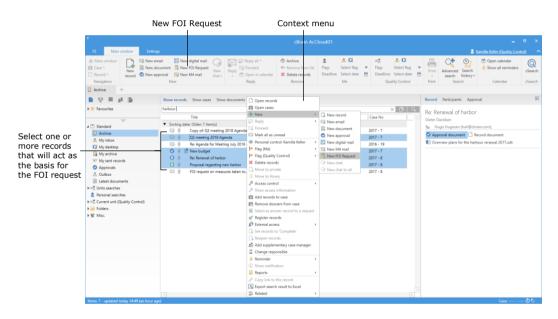


Figure 1: Create a new FOI request from the main window

The "New FOI request" dialogue opens and the FOI request can be given a title.

📔 New FOI Request	×
Iitle	
FOI Request regarding CSR	
Keyword	
HR C	0
<u>C</u> ase Guide:	
	Ŧ
The selected record will be included in the FOI request.	I

Figure 2: The "New FOI Request" dialogue



Note: Depending on F2's setup, adding a file plan number, action code, disposal code, or a case type and/or a case guide may be required when generating a new FOI request. It may also be possible to select a case template, which affects which metadata fields are mandatory.

Click on **OK** to open the FOI request as a case. The case consists of copies of the records selected in the main window.

The following sections provide a short introduction to the structure of an FOI request in the case window and describe the FOI request functions and fields in more detail.

An FOI request in the case window

This section provides a short introduction to the "FOI" tab in the case window.

When a new FOI request is created in F2, the case window opens with the "FOI" tab added. The top of the case window contains the case number and title. The case title corresponds to the title the user gave the FOI request.

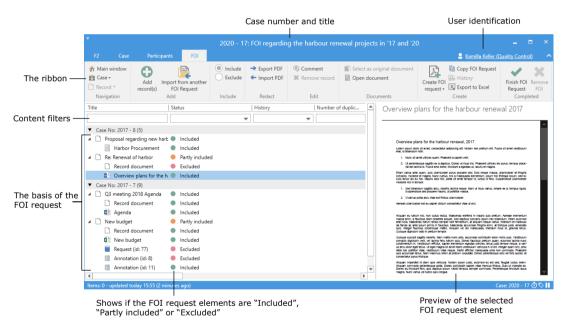


Figure 3: The "FOI" tab in the case window

Working with FOI requests is done primarily on the case window's "FOI" tab. A number of menu items for navigation, communication and managing the FOI request can be found in the tab's ribbon.

Below the ribbon of the "FOI" tab are the FOI request elements that make up the basis of the FOI request. It is possible to see which elements have been included and excluded in the FOI request. The FOI request elements are grouped first by records and then by the cases to which they are attached. Records that are not attached to a case form their own group. In the basis of the FOI request, unique column settings can be configured as needed. Use the content filters underneath



the names of the columns to filter the displayed content, e.g. by entering text or selecting an option from a drop-down menu.

A preview of the selected FOI request element is shown to the right.

The content of the FOI request report

The FOI request report always contains a summary of records divided between their cases. The FOI request report can be adjusted with different levels of details for the included records and FOI request elements. For further information on adjusting the FOI request report, see the section *Editing the FOI request report*.

Recor	d Insight S		<u>C</u> B	RAIN The Process Compan				
Recor	d Summar	у					28-04-2020	
	tle: Harbour F umber: 2017 -							
Record id	Date	Title	Record no.	#	From	Until	Excluded	Commen
418	27-04-2017 15:10:30	Re: Renewal of harbor		2				
	Attachments							
		Record document.html					EXCLUDED	
		Overview plans for the harbour renewal 2017.odt						
448	10-05-2017 10:15:42	Proposal regarding new harbor		1	Dieter Davidsen (Chief consultant, Secretariat of the management); Dorthe Duess (Department head, Secretariat of the management); Hugo Hugosen (Minister, Doc Organisation)			
	Attachments							
		Harbor Procurement.txt						

Figure 4: Record summary in the FOI request report

The different fields in the record summary are described below.

Field	Description
"Record no."	When a record is registered it is assigned a record number. The record number appears in this field.
	Once an FOI request report is generated, its elements can be sorted by record number. Records that are not registered and therefore do not have a record number are listed either before or after records with a record number. Read more about sorting FOI request elements in the section <i>Editing the FOI request report</i> .
"Date"	The date in this field corresponds to the creation date of the record.
"Title"	The "Title" field shows the record's title.
"Record ID"	Every record in F2 has a unique record ID. The record ID appears in this field.



Field	Description
<i>"#"</i>	The "#" field shows how many related documents that are attached to the record. Included in this number are the record document along with any documents, annotations, etc., that are attached to the record.
"Comments"	If a comment has been added to a record in the basis of the FOI request, it appears in this field. Read more about comments in the section <i>Add comment</i> .

Managing record numbering in an FOI request

If a generated FOI request has a gap in its sequential record numbering, the reason may be that a record has been deregistered and/or removed from the case.

Deregistration of records

Т

A record is assigned a record number once it is attached to a case and the "Registered" checkbox has been ticked.

Ŧ									FOI (R	ecord	I ID: 645)					
F2	Record Advanced	Participants														
 ☆ Main win ☆ Case ☆ Record Navigatio 	Edit X Delete record	Archive and close	Prepare sending • Delivery	Set record to 'Complete' Status	New chat	New note New annotation New request New	New record •	Add approval	Show all fields •	Elag Dea	g: Select flag dline: Select date Me	va ▼ Fla ⑦ De		g 🔻	0 Attachme	Print Print Documents
∐itle:	FOI															
Status:	In progress			Letter	date:						Access:	Quality				\$°
Deadline:				Case:		2019 - 13;					Keyword:					
										æ						F
Responsible:	Klaus Salomon			Regist	ered:	 Record No: 1 					Created date:	21-10-2	019 06:48 by	(laus Sal	omon	
	Case manager, Quality					1					External access:	Open				

The "Registered" checkbox and record no.

Figure 5: Registering a record

Records are assigned record numbers in the order that they are registered. Once a record number has been given to a record, the number cannot be reused. This means that if a record is deregistered, the record number it was assigned is no longer available.

If the record is registered again, it is assigned a new record number – the next record number available and not the one it was originally given.

Record numbers are connected to cases. If a registered record is removed from a case, it will be given a new record number if it is attached to the same case again.

Finding a record that is deregistered and removed from a case

Records that have been deregistered and removed from a case can be found again using the case history. Click on **History** in the case window's ribbon to view the case history.



												F	listo	огу			
₹ F2 Case	Participants	FOI		2020 - 17	FOI re	egardir	ng the h	arbour rene	wal proje	cts in '17 and	20				👤 Kamilla Ke	– ler (Quality Cor	□ ×
 Main window 	Edit Edit	New record	역 New email 밝 New document Q New approval	@ New Digital Post A New M4 mail	New note •		Add F2 Manager	Set case to 'Complete' Status		older structure h record list Right alignme • View	33	Edit grouping		History Related case		P nt Copy link to	Q
<u>T</u> itle: Responsible:	FOI regarding the hi	arbour ren	ewal projects in '17 a	nd '20 Status:		In pr	rogress										
Show more field																	

Figure 6: The case history in the case window

The "Case history" dialogue contains a log of all actions made on the case. Using the "Description" column it is possible to see if a record has been removed from the case. It is also possible to see if the record has been deregistered.

		Case history		_ 1	- ×
Case history					
C Show reco	rd				
Home					
Time 🔻	Current record title	Description	User		4
•					
15-04-2020 15:59	New agenda	Moved from case '2017 - 7: Organisation of team meetings 2018' to case	Klaus Salomon		
15-04-2020 15:59	New agenda	Create new record version	Klaus Salomon		
15-04-2020 15:59	New agenda	Changed date created from '15/04/2020' to '13/08/2018'	Klaus Salomon		
15-04-2020 15:59	New agenda	Created record (New agenda)	Klaus Salomon		
15-04-2020 15:51	Q3 meeting 2018 Agenda	Changed to from 'Administration (Distribution list)' to 'Anders Andersen;	Ann Sekner		
15-04-2020 15:51	Q3 meeting 2018 Agenda	Changed record number from '6' to ' <empty>'</empty>	Ann Sekner		
15-04-2020 15:51	Q3 meeting 2018 Agenda	Changed registered from 'Yes' to 'No'	Ann Sekner		
25-02-2020 14:21	1	Added responsible unit HR to case	Hanne Winter		
25-02-2020 14:21		Changed keywords from ' <empty>' to 'CaS'</empty>	Hanne Winter		
25-02-2020 14:21		Added keyword (group): CaS	Hanne Winter		
03-01-2019 10:33	New budget	Annotation seen: The documents have been reviewed and approved by t	Hans Hansen		•
Last updated 15:59					
	record's title	Shows that the record has been deregistered			
	The "Moved from	case" description			

Figure 7: The "History" dialogue

Once the wanted record is identified, it can be found in the "Archive" by searching for the record title.



The FOI Request ribbon

The menu items for working with an FOI request are located in the ribbon of the $``{\rm FOI}''$ tab.

₹					2020 - 17	7: FOI regarding	g the harbour ren	ewal projects in '17 and '20				×
F2	Case	Partici	ipants	FOI						💄 <u>Kamilla Keller (C</u>	Quality Contro	<u>n</u> ~
☆ Main w Case •		Add record(s)	Import fro FOI Re	e m another	Include Exclude	Export PDF Export PDF	 Comment Remove record 	 Select as original document Open document 	Create FOL	Copy FOI request History	Finish FOI Request	Remove FOI
Navigat	tion		Add		Include	Redact	Edit	Documents		Create	Comple	eted

Figure 8: The "FOI" tab in the case window

The menu items for the "FOI" tab are described below.

Function	Purpose
☆ Main window	Navigate between the main, case and record windows by clicking on the corresponding menu item.
Record · Navigation	The "Record" menu item is only active if a record is open.
	Click on the "Case" drop-down menu to navigate to the case participants.
•	Add one or more records to the basis of the FOI request.
Add record(s)	For more information about added records, see the section Adding records to an FOI request.
R	Import records and FOI request elements from another FOI request.
Import from another FOI Request	Read more about importing from another FOI request in the section <i>Import from another FOI request</i> .
Include Exclude	Choose to include or exclude a record, a document, or another FOI request element such as an annotation from the FOI request.
	For more information, see the section <i>Include or exclude elements</i> .



	The Process Company
Function	Purpose
Export PDF Export PDF	It is possible to extract an FOI request element by exporting the element from F2. This can e.g. be used to remove sensitive personal data from the FOI request. Click on Export PDF to export the element. Once the element is exported it can be edited as needed.
	Once the element has been extracted it must be imported back to F2. Click on Import PDF to import the edited element.
	For more information about exporting and importing elements, see the section <i>Export and import elements</i> .
Comment	Adds a comment to the FOI request element. This can e.g. be used to add the reason why a record or a document has been excluded or extracted.
	For more information about comments, see the section <i>Add comment</i> .
Remove record	To remove a record from the basis of the FOI request, first select the wanted record and then click on Remove record . The record and all its attached FOI request elements are then removed. This function is useful if a record has accidentally been included in the FOI request.
Select as original document	The chosen document is selected as the original document for duplicates (identical documents).
	For more information about duplicates, see the section <i>Show duplicates</i> .
🖹 Open document	The chosen document is opened. The document can also be opened by selecting it and pressing Enter .



Function	Purpose
Create FOI request • Create FOI request Edit FOI Request	To generate the FOI request report, click on Create FOI request . Once F2 has generated the FOI request report, it appears in "My inbox" as an unread record. To adjust the FOI request report before it is generated, click on Edit FOI request . The following
	dialogue opens:
	Separate per case Remove diplicate documents Save and close Create FOI request " dialogue In the dialogue unwanted content can be removed,
	the FOI request type can be selected, and the filtering of the FOI request report can be edited. For more information on creating and editing the FOI request report see the sections <i>Create an FOI request report</i> and <i>Editing the FOI request report</i> .
Copy FOI Request	Click on Copy FOI request to copy the FOI request to another case using the dialogue displayed below.
	Figure 10: The "Copy FOI request" dialogue



Function	Purpose							
History	Once a record is selected from the basis of the FOI request, the History item becomes active. Click on it to open a dialogue that shows if the record is a part of other FOI requests.							
	History – 🗆 ×							
	Below is shown a list of FOI Requests wherein 'CSR report 2019' appears. Title Case No Status Remark							
	CSR 2019 - 13 Not closed FOI Request regarding CSR 2019 - 19 Not closed							
	A A A A A A A A A A A A A A A A A A A							
	<u>```</u>							
	Figure 11: The "History" dialogue							
	Note : The "History" column, if visible in the basis of the FOI request, also shows whether the record is a part of other FOI requests.							
Export to Excel	The basis of the FOI request can be exported to Excel as a CSV file by clicking on Export to Excel .							
~	To complete the FOI request, click on Finish FOI request. The dialogue below opens.							
Finish FOI Request	⑦ Finish FOI Request ×							
	Are you sure you want to finish the FOI Request?							
	Yes No							
	Figure 12: The "Finish FOI Request" dialogue							
	Click Yes to complete the FOI request. It is then no longer possible to create an FOI request report or to edit the basis of the FOI request.							
×	To remove the FOI request from the case, click on Remove FOI . The dialogue below opens.							
Remove FOI	Remove FOI ×							
	Are you sure you want to remove the FOI request?							
	Yes No							
	Figure 13: The "Remove FOI" dialogue							

This menu item is only active when the basis of the FOI request is empty.



FOI Request functions

This section explains a number of the functions related to working with FOI requests.

Adding records to an FOI request

To add more records to the basis of the FOI request, click on ${\bf Add\ records}$ in the ribbon of the "FOI" tab.

	Ac	dd recoi	rds									
₹					2020 - 17	: FOI regarding	g the harbour rene	ewal projects in '17 and '20		-	•	×
	Case	Parti	cipants	FOI					💄 <u>Kamilla Keller (C</u>	uality Contro	<u>ol)</u>	
☆ Main v ⑦ Case • ○ Record		Add record(s)	Import fro	equest	 Include Exclude 	→ Export PDF ← Import PDF	 Comment Remove record 	 Select as original document Open document 	Copy FOI request History	Finish FOI request	Remo FOI	
Naviga	ation		Add		Include	Redact	Edit	Documents	Create	Comp	leted	

Figure 14: Add records

The "Choose records" search dialogue opens and the wanted records can be searched for. To add only a single record to the FOI request, simply click on **OK** after the record has been found and selected in the result list.

To add multiple records to the FOI request, use the **Add records** menu item. Selected records from the result list are then added to the "Chosen records" field. Once all the wanted records are found and added to the "Chosen records" field, click on **OK**.

ЭК I	Add records Selected reco	oras		_
	Choose records - a copy of the selected records a			
Search window Settings			۵	
OK Cancel Choose one rec OK OK Recor		Remove all dossiers Search Search fields		
■	Show records Show cases Show documents Show re	equests		
🖌 📩 Favourites		्		-
📥 My inbox	Title Modified	▼ Modified by	CSR report 2019	
🖾 My desktop	FOI request 21-10-2019 06:48	Klaus Salomon	Levers greats data of active, ensembles adjuscing alls, and do strategied receipter incidents of labors of datase mapse allops. To main adjustice weaks, goint scattered ensembles collabors indered and or attacept on a constrainty constraint. First active scattered ensembles in	
Archive	vacation plans 2020 23-09-2019 10:43	Vibeke Villasen	voluçtate velit mer ollum dolore na lugisi sulla pariatur. Rompimar sint sconenat capitalest non product, eust in celpe qui officie deserunt aufiit soin il ne bdorum.	
	CSR report 17-09-2019 10:17	Hugo Hugosen	Lower lystem data at anot, conservator adjutcing alls, and do standard sexper includent at index of datas mapped adjuss 17 mills ad atomic transmic, use more an adjutcing adjutcing labelets and adjutcy in an anomalic conseque. These areas from datas mapping which areas with anyon of the datas on a logic action periods. Encourses and consent capabilities are another, much in origin periods from service and the action of the dataset.	
	di Vacation plans 2020 17-09-2019 10:15	Hugo Hugosen	con positioni, most in origin qui officie disservant antific animi il est belorven. Lossas (penne datos ati anni, consentatos adiptoring diti, ani de situanted imparti instalatati et fadora et datore anglas adipas. El estas at datoria venane, que normat descritation ethenor fadora situ et adopte en consensato conseque). Else areas area dato in impartendente in	
Standard	CSR report 16-09-2019 15:23		temperature este encodera della della sedana este anche ante este este este este este este este e	 The result I
Archive	CSR report 16-09-2019 14:59	Vibeke Villasen	Lower peak data of sense, concentrator adjusticing dells, and de risonante inspare inciditator of below of follow a magner adjuss. To mine adjusticite weakney, units motivate mandanism ultimore induces and ut adjusty on an anomanic consequent. Done sense than on the originate motivates must many adjustice in longer acade, permittee discover and sourcester reprinten- non profilms, sense in more particular discover and the site of the device.	
📥 My inbox	Vacation plans 2020 16-09-2019 10:19	Vibeke Villasen	non proteines, ware to colyte pol efficie diseases and/or action of any lackness. Correst parts doing at anyon, researcherse adjustering dits, and do atsamcid respect incidences or factors of doings mappe adjust 11 statis at attraction transmission and endoings of these of	
My desktop	Vacation plans 2020 16-09-2019 10:19	Hugo Hugosen	industria nati uti adiputy ate na commonito consengene. Incis senti trave dolor in regordenamienti in voltapitate nelli more cilitani delane nei lagisti codia perioritori. Econopticari sisti econocat cospilatati nen perioritori, senti in cogina qui officia intervano mellita natio ini den laboraria.	
Av archive	Approval letter 17-07-2019 09:16	Klaus Salomon	Lowes (peep data at some, consectour adjuscing dity, and do examind ranges includent at indexe at datase sugges adjust. If we said ad anima weaker, que nortred eserubation charac- ladaria at al adjust are so consector consequent. Due area inver due in a sequenced and in a second se	
V My sent records	Employee Information 19-05-2017 09:14 image 14-01-2016 08:22	Hugo Hugosen Vibeke Villasen	triapate nell nen oliva dotte na bajar nafa pateras. Ranpras da manara rapidete na penden, nent la raja qui oficia duersar solit acia ti si al alteras.	
Approvals	image 14-01-2016 08:22	VIDERE VIIIdsen	1 1 2	
🏝 Outbox (1)				
Latest documents			Lowes (power dotte ult seas), consentitive adiptiviting effic, and de viscourd respons institutions of factors at dations magne adigos. Ye units ad atolinis resisten, guita soutrord manchation offantes instance and a adapting an an community consequent. First new trave data in a regulationalistic in	
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F2 Requests to unit			weinplate weit mass offices dollars in light wells particles. Receptors shit meaned requisites non-periodest, want in onlyse and officia theorem and the state. If not informed	
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▶ ¤ Units (5)	4		labora aini at ahajiy sa na camando canangan. Itua aoin isun dolar in capadaminti in	

Figure 15: The "Choose records" search dialogue



Once the selected records are added, they appear in the basis of the FOI request.

If a record is added to the basis of the FOI request, but has already been added previously, a validation error message appears and the record is not added a second time. See the figure below.

1	Adding records to the FOI request failed.
	Adding records to the FOI request failed.
	(1 of 1 failed)
	AcCloud01

Figure 16: Validation error

Import from another FOI request

To import material from another FOI request, click on **Import from another FOI request** on the ribbon of the "FOI" tab. This can e.g. be relevant if another office needs to contribute material to the basis of the FOI request and has created their own FOI request case.

In	nport fro	om another FO	I request						
Ŧ			2020 - 17	7: FOI regarding	g the harbour ren	ewal projects in '17 and '20			×
F2 Case	Partic	ipants FOI					🔒 <u>Kamilla Keller (Q</u>	uality Control)	^
Main window Case ▼ Record ▼	Add record(s)	Import from another FOI request	Include Exclude	→ Export PDF ← Import PDF	Comment	 Select as original document Open document 	Create FOI request • K Export to Excel	Finish FOI Rer request F	move
Navigation		Add	Include	Redact	Edit	Documents	Create	Completed	d

Figure 17: Import from another FOI request

In the "Import from another FOI request" dialogue, select the wanted FOI request in the list and click on **OK**. Records from the selected FOI request now appear in the basis of the original FOI request.

📄 Import from and	other FOI Request		
Title	Case No	Completed	
			•
Environmental Report	2018 - 1		
FOI	2018 - 4	4	
Preparation of Environment	al Report 2018 - 3		
_		ОК	Cancel

Figure 18: The "Import from another FOI request" dialogue

If the imported FOI request contains a record that is already a part of the basis of the FOI request, a validation error message informs the user that the record is not added a second time.



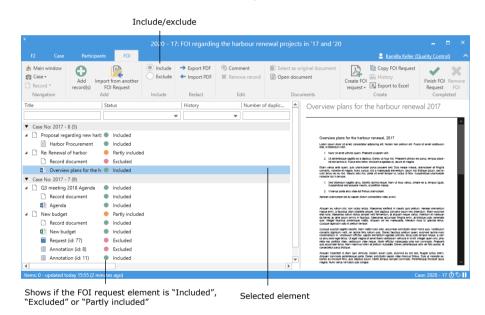
(1) Validation error	×
The following records are already included in the FOI Request:	
Employe information: Dieter Davidson (Record ID: 37)	
	<u>O</u> K

Figure 19: Validation error for "Import from another FOI request"

Include or exclude elements

FOI request elements can be excluded from the FOI request report if necessary. To exclude an element, first select it in the basis of the FOI request and then click on **Exclude** in the ribbon of the "FOI" tab. In the basis of the FOI request it is possible to see if an element is "Included", "Partly included" or "Excluded".

If an excluded element must be included again, select it and click on **Include**.





Export and import elements

An FOI request element must be exported from F2 in order for the user to perform extractions. This may be relevant if an element contains sensitive personal data that cannot be included in the FOI request report.

Select the wanted element in the basis of the FOI request and click on **Export PDF**.



Export PDF 2020 - 17: FOI regarding the harbour renewal projects in '17 and '20 🔒 Kamilla Keller (Quality Co ● Include → Export PDF ③ Comment Select as original docu A Main window 🗎 Copy FOI Request 0 2 A 1 X ← Import PDF X Remove record

Open document 🕅 Case 🗸 Exclude Add record(s) Finish FOI Re Request request • Export to Excel FOI Requ Add Navigation Redact Include Edit History Number of duplic... Title Overview plans for the harbour renewal 2017 -• Case No: 2017 - 8 (5) 🔺 🗋 Proposal regarding new harb 🌒 Included val 2017 Harbor Procurement Included Overview plants for the harbour reheway, 2017 Laren journ door at anet, consecteur adjocry ett. Nulam non pretum ett. Ruce ett, il biberdam nitk. 1. Nunc st anet ul/tics guan. Prasteri a sagion velt. 2. Ur perientsose agetts er a daplou. Dorec uf risu nitk Prasteri ul/tics leo net ett lacht is Fruce ere biothrouid a sgettada ut lacits et magna. Record document Evoluded Overview plans for the h
Included Etiam varius ante quam, quis ullancorper punts posuere sed. Duis neque massa, ullancorper al tringilia comasilis, moletole el magna. Nunc cusus, noi a malesuada elementum, ipicum noi tristique poum, sed la-cutis títuis ne eu mai. Naum so doi nas, porta at la melt tempor isi, tuctui la filia. Illeupendisse ullancorper Case No: 2017 - 7 (9) . Sed bibendum sagittis arcu, lobortis lacinia neque. Nam ut risus varius Sumandrina nel conuera multir, ut potitivo marca 4 🗋 Q3 meeting 2018 Agenda Included Record document Included Agenda Alquer eu natur nol, non luctus lectus. Maecenas eleftend in mauto quis preturn, Aenean elementum mesa emin, a tauctus dans phantina situat. Bed daplus convato (sum net bibendum. Bane element der truis). Necensa fruim lectus perspective filt mentional, a dispain regue analo. Herbann en metalesco quis, reger fructus scientinge metal. Alquam vet leo maesuada, internam ritus lo, gravita testa cuigate digrasmo dio pretuni meno. ▲ □ New budget Partly included Record document Included New budget Included Cuisque susci conveills digni condimentum i agitis loborts. Nam matis nunc oc n velt, vel lacinia felis rutrum quís. Jestinuum eficinia reación elemente Request (id: 77) Excluded us arcu obior eget teilus. Ut eget magna sit amet litero vestibulum veticula in til etti, integer quam ord, pha-retra nec portitor vitae, vestibulum vitae neque. Norbi efficitur matesuada uma non commodo. Praesent qui a sccurman teilus. Nam matemis lorem at prefum vulputate. Donec petientesque odo ve files auctor, et Excluded Annotation (id: 8) -requam imperdet id dam quis vehicula. Nullam ipsum justo, euismod eu est sed, feuglat luctus lorem. Alquam commoto peleritesque porta. Donce solicitudin sapien vibe rhoncus finitous. Duis ut moteste ex. Donce nu thoritunt finiti, quis dapibus ipsum. Morti lempus semper commoto. Pelertesque tinciduit lacus magna. Nuce value vel turbis cut «reven. Annotation (id: 11) Included Ŧ 17 க் லா

Figure 21: Export PDF

Save the element locally on the PC or on another device and then open it using a programme in which the element can be edited or extracted. Remember to lock and/or ensure protection of the document before it is saved again.



Figure 22: Edit PDF

Note: If a PDF file is edited or contains extractions, the user must ensure that the PDF file is locked and/or protected so that other users or external recipients cannot edit the FOI request report. This can be done in programmes such as Adobe Acrobat or LibreOffice.

Once the element has been edited, it must be imported back into F2 where it will replace the previously exported element. Select the exported element in the basis of the FOI request and click on **Import PDF**.



			Import PDI	F			
÷		2020 - 1	7: FOI regardir	ng the harbour ren	ewal projects in '17 and '20)	_ = ×
F2 Case	Participants	FOI				💄 <u>Kamilla Keller ((</u>	Quality Control)
☆ Main window ☆ Case • Case • Case •	Add Import fro record(s) FOI Re	Exclude		Comment	 Select as original document Open document 	Create FOI request • K Export to Excel	Finish FOI Remove Request FOI
Navigation	Add	Include	Redact	Edit	Documents	Create	Completed

Figure 23: Import a PDF

A dialogue opens in which the edited element can be selected from a location on the PC. Click on **Open** to import the edited element to the basis of the FOI request, replacing the selected element.

Remember: The element must be locked and/or protected before it is imported, otherwise other users can revert the editing.

← → · · ↑ 📜 « Documents > F	OI Request	~ U	Search FOI Request	1
Organize - New folder				· 🔳 🔮
 Quick access Dropbox OneDrive This PC Network 	Name CSR report.pdf FOI request.pdf	Date modified 21-11-2019 08:45 21-10-2019 12:28	Type PDF File PDF File	Size 38 KB 225 KB
File name:		~	PDF files (*.pdf)	

Figure 24: Select the edited element from a location on the PC

Once the edited element is imported, it appears in the basis of the FOI request along with the \checkmark icon. The status of both the imported element and the associated record will be shown as "Partly included" since the element is not included in full in the FOI request report.



*			2020 - 17	: FOI regarding	g the harbour ren	ewal projects in "	17 and '20		
F2 Case		ts FOI						💄 <u>Kamilla Keller i</u>	(Quality Control)
Main window Case • Record * Navigation	record(s)	FOI request	Include Exclude Include	Export PDF Emport PDF Redact	 Comment Remove record Edit 	Select as origina Open document Document		Create FOI request • X Export to Excel Create	Finish FOI Remove request FOI Completed
Title		Status		Remark	Record nu	ımber 🛛 📥	Agenda	3	
				•					
 Case No: 2017 	- 8 (5)								^
	egarding new harb	Included							
	Procurement	Included							
A 🗋 Re: Renewa	al of harbor	Partly included	1						
Record	l document	Excluded						Agenda for Q3 meetir	a. October 1
Overvi	ew plans for the h	Included						10:00 - 11:30	.,
▼ Case No: 2017	- 7 (9)							10.00 - 11.30	
🔺 🗋 Q3 meetin	g 2018 Agenda	Partly includes	i		6				
Record	l document	Included						1. Election of	reporter
🔹 Agend	a	Partly includes	i 🏓						
A D New budge		Partly includes	ł						
	document	Included							
🖬 New b	2	Included							
	st (id: 77)	Excluded		۲				1	
_	ation (id: 8)	Excluded							
Annota	ation (id: 11)	Included					210 x 2	97 mm <	~
						Þ	210 X 2		,
Items: 0 - updated	today 09:31 (28 m	inutes ago)							Case: 2020 - 17 🗿 🏷 📗
	Th	e icon for ir	nnortod	olomonto					
	1116		iipoiteu	elements				The imported eleme	ent

Figure 25: The imported element in the basis of the FOI request

Add comment

Comments can be added to all FOI request elements. This function may be used for stating the reason why an element was excluded or edited.

					1	Add comment			
Ŧ				2020 - 1	7: FOI regarding	g the harbour re	newal projects in '17 and '20)	_ = ×
F2	Case	Participants	FOI					💄 <u>Kamilla Keller (</u>	Quality Control)
A Main Case Record		Add Import f	rom another Request	Include Exclude	→ Export PDF ← Import PDF	Comment Remove record	 Select as original document Open document 	Create FOI request • S Export to Excel	Finish FOI Remove Request FOI
Naviga	ation	Add		Include	Redact	Edit	Documents	Create	Completed

Figure 26: Add comment

Select the wanted element and either click on **Comment** in the ribbon of the "FOI" tab or select **Comment** using the context menu. The "Edit comment" dialogue opens as shown below. Enter the comment here and click on **OK** to complete.

🖄 Edit comment	- 🗆	х
Excluded, as material contains a high level of sensitive	informati	on.
<u>O</u> K	<u>C</u> an	cel

Figure 27: The "Edit comment" dialogue



When a comment is added to an element, the (=) icon appears in the "Remark" field in the basis of the FOI request. Place the cursor over the icon to view the comment.

Ŧ				: FOI regarding	g the harbour ren	ewal projects in "	17 and '2		
F2 Case	Participants	FOI						🔒 Kamilla Keller	(Quality Control)
 ☆ Main window ☆ Case ▼ ☆ Record ▼ Navigation 		from another request	Include Exclude	Export PDF Export PDF Redact	 Comment Remove record Edit 	Select as origina		Create FOI request • Export to Excel Create	Finish FOI Remove request FOI Completed
Title	Sta	itus		Remark	Record nu	imber 📃 📥	Reque	st (id: 77)	
				r			Remark:		
▼ Case No: 2017	- 8 (5)							l, as material contains a high level of :	sensitive information.
🔺 🗋 Proposal re	garding new harb 🔵	Included							
Harbor	Procurement	Included							CBRAIN
🔺 🗋 Re: Renewa	l of harbor 🛛 🔴	Partly included	l i				Bes	tilling #77 (Doc Organisation) ettet Hugo Hugoen (Doc Organisation) d. 15/08/2018	infoRchruit.ck
Record	document 🛛 🔴	Excluded					Sent Frid	ft Hugo Hugosen (Doc Organization) d. 15/08/2018	www.cbrain.dk 02.kpr 2020
Overvie	ew plans for the h 🔵	Included					bei bei	Singbodrivelse Singbodrivelse Singbodrager Klaus Salomon (Quality)	
▼ Case No: 2017							Synt Ratu	ig for exhed is under til Hugo Hugosen (Doc Organisation)	
	g 2018 Agenda 🛛 🔴	Partly included			6				
	document 🛛 🌑	Included							
ali Agenda		Partly included							
▲ ☐ New budge		Partly included							
	document O	Included							
New bu		Included		۲					
	it (id: 77) 🔴	Excluded		\$					
	ition (id: 8) 🛛 🔴	Excluded Included						$\textcircled{1} \bigcirc \textcircled{2} \bigcirc \textcircled{2}$	
Annota	ition (id: 11) 🛛 🌑	included							
•						Þ			-
Items: 0 - updated	today 09:31 (an hour	ago)							Case: 2020 - 17 Ŏ 🏷 🚺

Comment icon

Figure 28: A comment in the basis of the FOI request

If needed, the comment can be edited. Select the wanted element and click on **Comment**. The "Edit comment" dialogue opens again. The comment can be removed by deleting all the text in the dialogue and clicking **OK**.

When a comment is added to a record, it appears in the record overview in the FOI request report and on the record detail page for the record in question. If a comment is added to another element such as a document or an annotation, the comment appears on the record detail page for this element.

Recor	d Insight S	Summary					
Recor	d Summar	У					28-04-2020
	tle: Organisa umber: 2017		meeting	ıs 2018	•		
cord	Date	Title	Record no.	# Fro	m Unti	Excluded	Comment
	15-08-2018 09:06:07 Attachments	New budget		5			
		Record document.html					
1	27-11-2018 13:53:55	New budget.xlsx Q3 meeting 2018 Agenda		9			
	Attachments	Record					
		document.html					
_		Agenda.docx Metadata for ID No 519.pdf					
		Record					
		document.html Approval document.html					
		New budget xisx					
		Metadata for ID No 554.pdf					
		Record					
		document.html Employee B.docx				EXCLUDED	Comment: Document is irrelevant to the

Figure 29: Example of a record with a comment

Show duplicates

F2 shows if any identical documents (duplicates) appear in the same FOI request and will then appoint one of them as the original document.



On the "FOI" tab, the "Number of duplicates" and "Record ID for original record" columns can be added to the FOI request basis.

▼				7: FOI regardin	g the harbour ren	ewal projects	in '17 and '20				×
	Participar	nts FOI							🧕 <u>Kamilla Keller (Q</u>	uality Control)	• •
Main window Case ▼ Record ▼	Add Imp record(s)	port from another FOI request	 Include Exclude 	→ Export PDF ← Import PDF	CommentRemove record	Select as or Open documents	iginal document ment	Create FOI	Copy FOI request History Export to Excel	Finish FOI F	Remove FOI
Navigation		Add	Include	Redact	Edit	Docu	iments		Create	Complet	
Title		Status		Number of duplication	ates Record ID for o	riginal record F	Rec.ID				
			Ŧ								
▼ Case No: 2017	- 8 (5)										
🔺 🗋 Proposal re	garding new harb	Included				4	48				
	Procurement	Included									
A 🗋 Re: Renewa		Partly include	d	1		4	18				
	document w plans for the h	Excluded									
 Case No: 2017 		 Included 									
▲ Q3 meeting		Partly include	d			5	86				
-	document	Included									
💼 Agenda		Partly include	d 💉								
🔺 🗋 New budge	et	Partly include	d			5	19				
	document	Included									
New bu	-	Included									
	t (id: 77)	 Excluded Excluded 									
_	tion (id: 8) tion (id: 11)	 Excluded Included 									
 Case No: (Non) 		 Included 									
A 🗋 Re: Renewa		Included		1	418	6	68				
Record	document	Included		1							
🚯 Overvie	ew plans for the h	Included									
•								•			
Items: 0 - updated	today 10:41 (a mi	nute ago)							Ca	se: 2020 - 17 (₫♡II

Number of duplicates

Record ID for original record

Figure 30: Display of duplicates

Column	Description
Number of duplicates	The column shows the number of duplicates for a given document.
Record ID for original record	The column shows which record contains the original document.

Select the original document

F2 automatically selects an original document for every duplicate, but it is possible to manually select another document. To do this, select the wanted document and click on **Select as original document** in the ribbon of the "FOI" tab.

Select as original document

Figure 31: The "Select as original document" menu item



Remove duplicates (add-on)

Duplicates can be removed by clicking on the dropdown menu **Create FOI request** and then on **Edit FOI request**.

In the "Edit FOI request" dialogue tick the "Remove duplicate documents" checkbox. See the figure below.

A	
Create FOI	
request 🕶	
🔄 Create	e FOI request
冯 Edit F	OI Request

Figure 32: The "Create FOI request" menu item

📙 Edit FOI Request	-	□ ×
Remove unwanted content		
When a neu FOI Request is created	Override existing record	•
No active FOI Request. What shal the	e title of the FOI Request be?	
Record title	FOI Request report	
FOI Request type	Full FOI Request	-
Sort column	Title	•
Sort sequence	Ascending	•
Separate per case		
 Remove duplicate documents 		
s	ave and close Create FOI request	<u>C</u> ancel

Remove duplicate documents

Figure 33: The "Edit FOI request" dialogue

F2 FOI Request, Advanced can be configured to have the "Remove duplicate documents" checkbox ticked by default.

Information about duplicates in the FOI request report

If duplicate documents are removed using the "Edit FOI request" dialogue it will appear on the final FOI request report. It also shows if a document is a duplicate or an original.

Information regarding duplicates is displayed in the FOI request report types that contain documents:

- Full FOI request
- Overview: Cases, records, documents, etc.

In the "Record details" section on the original document, the number of duplicates is listed. On a duplicate the "Record details" section states that the document is a duplicate and lists the record containing the original document. If the duplicate has been removed from the FOI request, this is also stated.

Editing the FOI request report

To edit the FOI request report before it is created, click on **Edit FOI request** in the ribbon of the "FOI" tab.



					Edi	t FOI	request	
Ŧ		2020 - 17	: FOI regardin	g the harbour ren	ewal projects in '17 and '20			_ 🗆 ×
F2 Case	Participants FOI						🔒 <u>Kamilla Keller (Q</u>	uality Control)
Main window I Case ▼ Record ▼	Add Import from another record(s) FOI request	Include Exclude	→ Export PDF ← Import PDF	 Comment Remove record 	 Select as original document Open document 	Create	Copy FOI request History e FOI est • X Export to Excel	Finish FOI Remove request FOI
Navigation	Add	Include	Redact	Edit	Documents		Create FOI request	Completed
						R	Edit FOI request	

Figure 34: Edit FOI request

Click on the "Edit FOI request" menu item to open the dialogue in which unwanted content can be removed, the FOI request type can be selected, and the filtering of the FOI request can be adjusted.

A standard setup for the "Edit FOI request" dialogue can be configured on an installation level.

📙 Edit FOI Request	_ 🗆 ×
Remove unwanted content	
When a neu FOI Request is created	Override existing record
No active FOI Request. What shal the	e title of the FOI Request be?
Record title	FOI Request report
FOI Request type	Full FOI Request
Sort column	Title 💌
Sort sequence	Ascending
Separate per case	
Remove duplicate documents	
S	ave and close Create FOI request Cancel

Figure 35: The "Edit FOI request" dialogue

The available functions in the "Edit FOI request" dialogue are described below.

Function	Purpose
"Remove unwanted content"	A filter that automatically removes unwanted content before the FOI request report is created can be set up for the organisation. Unwanted content may be records or files that contain a certain name.
	To activate the filter, tick the "Remove unwanted content" box. Click the question mark icon next to the field for an overview showing what will be removed by the filter. See the figure below.



	The Process Company
Function	Purpose
	FOI Request filter
	Figure 36: FOI request filter
"When a new FOI request is created"	Select whether to create a new record or to overwrite the existing record when a new FOI request is created. Choose between the following options:
	Create new record
	Overwrite existing record.
"Record title"	Specify a title for the FOI request report. An organisation can decide on a standard title if wanted.
"FOI Request type"	Select the type of FOI request report to create. The type refers to the level of detail the report contains:
	Full FOI request
	• Overview: Cases, records and documents, etc.
	Overview: Cases and records
	Overview: Cases and records (compact).
	The different detail levels are described in the section Detail levels for the FOI request report.
"Sort column"	Select the sequence by which to sort the FOI request report elements. Choose between the following columns:
	• Title
	• ID no.
	Letter date
	Record number.
"Sort sequence"	Sort the chosen column by the following values:
	Ascending



Function	Purpose
	Descending.
"Separate per case"	If this box is ticked, the FOI request report is separated for each case.
"Remove duplicate documents"	If this box is ticked, all duplicates are removed from the FOI request report (add-on).
	For more information on removing duplicates, see the section Remove duplicates (add-on).

Detail levels for the FOI request report

The next sections describe the different detail levels available when generating an FOI request report.

Full FOI Request

Select "Full FOI request" to create a complete FOI request that shows the selected records divided between the cases to which they are attached.

The FOI request report contains all the included FOI request elements in full, i.e. documents, requests, annotations and any comments.

ecord Insight S ecord Summary see Title: Harbour R see Number: 2017 - 1 ecord Date 8 27:04:2017 15:10:20 Attachments	enewal 8	cord #	From	Ilatii	28-04-202 Adress Lin Mall Website Data Data Data Data Data Data	e 1	Overview pla Lorem ipsum dolor erot, id bibendum r 1. Nunc sit on 2. Ut pelente	net ultrices quam. Praesent a sapien velit. sque sagittis ex a dapibus. Donec ut risus nisi. Pr	m pretium elit. Fusce sit amet vestibut Praesent ultrices leo purus, tempus pla
ecord Summary ise Title: Harbour R ise Number: 2017 - 1 ecord Date	enewal 8 Title Ree no.		From	Intil	Adress Lin Adress Lin Mail Website Data Data Data Data Data	e 1	Lorem ipsum dolor erat, id bibendum r 1. Nunc sit an 2. Ut pellente	r sit amet, consectetur adipiscing elit. Nullam nor nbh. net ultrices quam. Praesent a sapien velit. sque sagittis ex a dapibus. Donec ut risus nisi. P	Praesent ultrices leo purus, tempus pla
ecord Summary ise Title: Harbour R ise Number: 2017 - 1 ecord Date	enewal 8 Title Ree no.		From	Intil	Mall Website Data Data Data Data	W 2	erat, id bibendum r 1. Nunc sit an 2. Ut pellente	nibh. net ultrices quam. Praesent a sapien velit. sque sagittis ex a dapibus. Donec ut risus nisi. Pi	Praesent ultrices leo purus, tempus pla
ecord Date 27-04-2017 15:10:20	enewal 8 Title Re- no.		From	Until	Data Data Data		2. Ut pellente	sque sagittis ex a dapibus. Donec ut risus nisi. Pr	
ecord Date 8 27-04-2017 15:10:30	8 Title Rei no.		From	Until	Data				
18 27-04-2017 15:10:30	no. Re: Renewal of		From	Lintil	0.010		rat est lacin	nia id. Fusce eros tortor, tincidunt a egestas ut, ia	cuis et magna.
	Re: Renewal of harbor			onui	Excluded	Comment	convallis, molestie	quam, quis ullamcorper purus posuere sed. Du et magna. Nunc cursus, nisl a malesuada eleme nisi. Mauris odio nisl, porta sit amet tempor id,	entum, ipsum nisl tristique ipsum, sed
		2					1. Sed biben	son. dum sagittis arcu, lobortis lacinia neque. Nam ut se sed posuere mauris, ut portitior massa.	t risus varius, ornare ex a, tempus lig
	Record document.html Overview.plane				EXCLUDED			orta arcu vitae est finibus ullamcorper.	
	for the harbour							er est eu sapien dictum consectetur vitae ut orci.	
8 10-05-2017 10:15:42	2017.odt Proposal	1	Dieter Davidsen				Autoan diamonp	il est eu saplen actum consectetur viae actoro.	
	regarding new harbor		(Chief consultant, Secretariat of the management(); Dorthe Duess (Department head, Secretariat of the management(); Hugo Hugosen (Minister, Doc Organisation)				massa enim, a fau erat nulla. Maecen da fames ac ante guis. Integer fauci	nisi, non luctus lectus. Maecanas eleifend in n ciclus diam pharetra aliquet. Sed daptus conreal as rutrum lectus semper veit fermentum, at alique ipsum primis in flucibus. Maecenas accumsan i bus scelerisque mottis, Aliquam vel leo males odo in pretium tempor.	allis ipsum nec bibendum. Etiam euisn auam neque varius. Interdum et males fringilla enim, at tristique justo venen
Attachments			organization)				Quisque suscinit s	agittis lobortis. Nam mattis nunc odio. accumsan	n sollicitudin dolor mollis ruis. Vestibu
number of related documents.	Harbor Procurement.txt						convallis dignissim condimentum in. V us arcu dolor eget	velit, vel lacinia folis rutrum quis. Donec faucib festibulum efficitur, sapien elementum egestas ul tellus. Ut eget magna sit amet libero vestibulum v vitae, vestibulum vitae neque. Morti efficitur m	bus pretium quam, euismod lacinia n ultricies, tellus justo tempor neque, a v vehicula in id elit. Integer quam orci, p
Record Details								udget] == Dokument 4 == [New budget] ==	
Record Title: Re: Re	newel of book			0	BRA	MN .	Endorsem	ent (ID 11)	
Record Number:	newai or hard	or		25.4	The Price	sa Company	Created by:	Hugo Hugosen den 03-01-2019	CBRAIN
Case Number: 2017	- 8						Seen by:	Hans Hansen on the 03-01-2019	28. april 2020
Record id: 418							Endorsement Options:	See text below	
Date: 27-04-2017 15	10:30						Endorsement description	n: The documents have been reviewed and approved by the f	head of office.
ype of Document Internal									
	cord document.html (NO1 enview plans for the harbo								

Figure 37: Example of a full FOI request report

Overview: Cases, records and documents, etc.

Select "Overview: Cases, records and documents, etc." to get a complete overview of the records that make up the basis of the FOI request divided between the cases to which they are attached. In addition, an overview of the documents, annotations and requests is displayed for every record, but the content of these is not shown. If a comment has been added to an element of the basis of the FOI request, then this also appears.



Record Case Tit	d Insight S d Summar tle: Harbour F umber: 2017 -	y Renewal	,			28-04-202	0	Record Num Case Numb Record id: Date: Type of Document:	er: 2017 - 8 418 27-04-2017 15 10:30 Internal	28-04-2020
Record id	Date	Title	Record # no.	From	Until	Excluded	Comment	Documents:	[1] Record document.html [2] Overview plans for the harbour renewal 2017.odt	
418	27-04-2017 15:10:30	Re: Renewal of harbor		2						
	Attachments									
		Record document.html Overview plans for the harbour renewal						Record D		CBRAI
		2017.odt						Record Title	e: Proposal regarding new harbor	The Process Con
448	10-05-2017 10:15:42	Proposal regarding new harbor		 Dieter Davidsen (Chief consultant, Secretariat of the management); Dorthe Duess 				Record Nur Case Numb		28-04-2020
				(Department head, Secretariat of the				Record id:	448	
				management); Hugo Hugosen				Date:	10-05-2017 10:15:42	
				(Minister, Doc				Type of Document:	Internal	
	Attachments			Organisation)				Documents:	[1] Harbor Procurement.txt	
		Harbor Programment.txt								

Figure 38: Example of an FOI request report showing cases, records, documents, etc.

Overview: Cases and records

Select "Overview: Cases and records" to get a complete overview of the selected records divided between the cases to which they are attached.

							28-04-2021									28-04-202 Adress Li	
Recor	d Insight S	Summary	/				Adress Lin Mail		Recor	d Insight S	Summary					Adress Li Mail	
Recor	d Summar	У					Website Data Data		Recor	d Summar	У					Website Data Data	
	tle: Harbour F umber: 2017 -						Data Data Data		Record	s without link	ed cases					Data Data Data	
Record id	Date	Title	Record no.	#	From	Until	Excluded	Comment	Record	Date	Title	Record no.	*	From	Until	Excluded	Comme
418	27-04-2017 15:10:30	Re: Renewal of harbor		2					668	16-04-2020 10:33:22 Attachments	Re: Renewal of harbor		2				
	Attachments									Attachmenta	Record document.html						
		Record document.html									Overview plans for the harbour renewal 2017.odt						
		Overview plans for the harbour renewal 2017.odt							# = number of	I related documents.							
448	10-05-2017 10:15:42	Proposal regarding new harbor		1	Dieter Davidsen (Chief consultant, Secretariat of the management); Doffte Duess (Department head, Secretariat of the management); Hugo Hugosen (Minister, Doc												
					Organisation)												
	Attachments	Harbor															

Figure 39: Example of an FOI request report showing cases and records

Overview: Cases and records (compact)

Select "Overview: Cases and records (compact)" for a complete overview of the records that make up the basis of the FOI request divided between the cases to which they are attached. This option removes all unnecessary page breaks. This provides the user with a compact overview.

This level of detail is suitable to use e.g. in a dialogue about the material to be delivered as part of the FOI request.

С	BRAIN
	The Process Company

	tle: Harbour F								
	umber: 2017 -								
Record id	Date		Record 10.	#	From		Until	Excluded	Commen
418	27-04-2017 15:10:30	Re: Renewal of harbor		2					
	Attachments								
		Record document.html Overview plans for the harbour renewal 2017.odt							
448	10-05-2017 10:15:42	Proposal regarding new harbor		1	Dieter Davidsen (Chief consultant, Secretariat of the management); Dorthe Duess (Department head, Secretariat of the management); Hugo Hugosen (Minister, Doc Organisation)				
	Attachments				Organiaa	uony			
		Harbor							
# = number of	related documents.	Procurement.txt							
Record Record id	s without link Date	ed cases Title		Reco	rd #	From	Until	Excluded	Commer
	16-04-2020 10:33:22		-						
668	16-04-2020 10:33:22 Attachments	Re: Renewal of hart	oor		2				
	Fillioninolito	Record document.ht	tml						
		Overview plans for t	lho						

Figure 40: Example of a compact FOI request report

Create an FOI request report

Once the content of the FOI request is selected, click on **Create FOI Request** in the ribbon of the "FOI" tab. It is possible to continue working in F2 while the FOI request report is being generated.

						C	reate F	OI request		
Ŧ			2020 - 17	7: FOI regarding	g the harbour ren	ewal projects in '17 and '20				×
F2 Case	Participants	FOI						💄 <u>Kamilla Keller (</u>	Quality Control)	^
Main window	Add Import fr	om another request	Include Exclude	→ Export PDF ← Import PDF	 Comment Remove record 	 Select as original document Open document 	Create F reques	Copy FOI request	Finish FOI Ren request Fi	move
Navigation	Add		Include	Redact	Edit	Documents		eate FOI request	Completed	1

Figure 41: Create FOI request

The progress of the PDF creation is displayed by a status bar at the bottom right corner of the FOI window.

Case: 2019 - 13 🗿 🛇 📕 Action 1/2: Preparing records for FOI item 0 of 6

Figure 42: The status bar

Once F2 has generated the FOI request the user is notified that the FOI request report is ready in "My inbox".



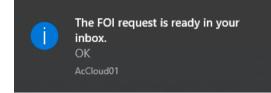


Figure 43: Message regarding the ready FOI request

The FOI request report is attached to the record. See the example below.

Rec	ord with a	n FOI request						The a	attached F	OI request report
≠ F2 Main window S	ettings			cBrain Act	Cloud01					L II ×
☆ Main window	ew email 🔯 Ne ew document 🙀 Ne		Reply all * Forward Open in calendar Reply	 Archive Remove from list Delete record * Remove 	E Flag: Deadline:	Select flag V Select date	ot <mark>o</mark> ≜ ⊠ Flag: Select flag Deadline: Select date HR		t Advanced Search history	Open calendar A Show all reminders
	Show record	Show cases Show docum	ents Show requests					Record Pa	articipants	le.
✓ ★ Favourites ▲ My inbox (1)							D Q	FOI		
My desktop		Title	Sorting			From	Case title 🔺	Dame	document 🔒 FOI re	and a dif
Approvals		FOI		020 14:12 2020 - 1			FOI regari		adcument 😁 Polite	questipol
 Approvais 	O ()	CSR 2020		020 12:27 2020 - 1	2	HR	CSR 2020	A		- #- 21 04 2020
	9	Strategy meeting	26-03-2	020 14:33		Klaus Salomon		Access to	to records created on the 21-04-2020	
	S	Evaluation meeting		020 14:33		Quality				
Standard (1)		New agenda	26-03-2	020 14:33 2017 - 5		Vibeke Villasen	Organisati			
Inits searches		Case A	26-03-2	020 14:33 2017 - 7		Klaus Salomon	Organisati			
Personal searches	S	Administration tasks	26-03-2	020 14:33		Klaus Salomon				
▶ ¤ Units	 Image: Image: Ima	Quality Report 2019	26-03-2	020 14:33 2020 - 6		Quality	Quality Re			
Folders		Appendix 1B	26-03-2	020 14:32 2020 - 1		HR	Quality rep			
▶ W Misc.		Appendix 2A	26-03-2	020 14:32 2020 - 1		HR	Quality rep			
	D 0	Assessment - 2020 Q4	26-03-2	020 14:32 2020 - 2		HR	Meetings i			
		Vacation plans 2020	26-03-2	020 14:32 2020 - 1	3	HR	Vacation			
	0 0	Summary of meeting	26-03-2	020 14:31 2020 - 1	1	HR	Case 5			
	🖂 () (Meeting agenda	12-02-2	020 16:33 2020 - 7		Klaus Salomon	HR meetin			
	0	Quality report	27-01-2	020 13:40 2020 - 4		Dieter Davidsen	Quality rep			
		Agenda for meeting	27-01-2	020 13:39 2020 - 3		Dieter Davidsen	Meetings 🕌			
	4						•			
Items: 26 - updated today 16:58 (0 mi	inutes ago)									Case: 🙆 🏷

Figure 44: The FOI request report in an inbox

A new FOI request report can be created if there is need for further editing or if another type of FOI request is needed. Click on **Create FOI request** to create a new FOI request report.

The user can process the FOI request just like any other record. It may be forwarded or the responsibility may be allocated to a colleague. The user can also send the FOI request for approval using the add-on module F2 Approvals.

Send the FOI request for approval

Using the add-on module F2 Approvals a generated FOI request can be sent for approval within the organisation. This may be relevant if the FOI request must be approved by another department or unit before it is sent to the requester.

Approvers can see and edit both the FOI request report (i.e. the generated PDF version of the FOI request) and the basis of the FOI request as well as what has been included and excluded (i.e. the FOI request case itself).

To create a draft of the FOI request that can be sent for approval, click on **Create FOI request** in the ribbon of the "FOI" tab in the case window.

The FOI request creator then receives a record in his/her inbox to which the FOI request report is attached as a PDF.



Open the record and set it in editing mode. Then click on **New approval** in the record window's ribbon.

The new approval dialogue opens and the user can enter the relevant information.

Tick the "Give approvers on this step write access to the record's case" box, then click on **Save** and the approval is created.

	New approval for I	FOI (record ID: 645)	х
	Deadline:	- 	
		r (?)	
	CAdd step		
	Step 1:		×
	Approvers:	Hugo Hugosen (Case manager, Doc Organistaion);	2 ⁰
	Copy to:	Select persons, units or distribution lists	2 ⁰
	Deadline: Notify approvers on this step, when changes are made:	 No ▼	
	inten enanges are maaer	Limited visibility ⑦	
Tick this box		Give approvers on this step access to the record's case ?	
	Add step		
		Save as template Save Car	ncel

Figure 45: Give approvers access to the FOI request report

The box must be ticked on each approval step to ensure that all approvers have write access to the case containing the FOI request. They can then edit the basis of the FOI request.

Note: The box "Give approvers on this step write access to the record's case" must be ticked before the approval is started.

Start the approval. All the approvers are now able to add or remove content from the FOI request case and edit the PDF version of the FOI request report. An approver has the same permissions on the FOI request case as the FOI request creator.

Once the FOI request report has passed through the approval process and is back with the FOI request creator, the user has the following options depending on the outcome of the approval process:

- If the FOI request report has been finally approved without any comments or the PDF version of the FOI request report has been edited/extracted directly, it can be sent to the requester.
- If content has been added or removed from the FOI request case itself, a new FOI request report must be generated before it can be sent to the requester.



Note: If a PDF file is edited or contains extractions, the user must ensure that the PDF file is locked and/or protected so that other users or external recipients cannot edit the FOI request report. This can be done in programmes such as Acrobat Reader Pro or LibreOffice.

For more information about approval flows, see the F2 Approvals – User manual.

View ongoing and completed FOI request cases in the main window

FOI request cases are accessed from the navigation bar in the main window.

Click on the navigation line **shortcut** below the main window ribbon. The list of ongoing FOI request cases opens.

Double-click or right-click on the **wanted FOI request case** to open and view the basis of the FOI request.

FOI request cases can be added to "Favourites" using the context menu.

Click on **Finished FOI Requests** to see the FOI request cases that are completed.

The right-click options for finished FOI request cases are the same as for active ones.

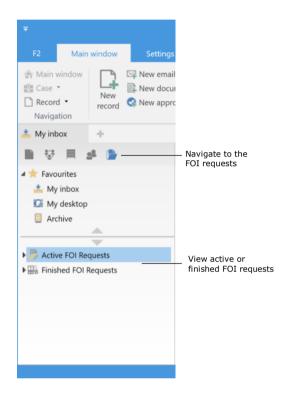


Figure 46: Navigate to active and completed FOI requests in the main window

Note: A user can only see the FOI request cases to which they have write access, i.e. the user must be involved or specified as a supplementary case manager. Cases with access set to the user's unit or to "All" are also displayed.



Configuration options for F2 FOI Request, Advanced

The configuration of F2 FOI Request, Advanced is performed on an installation level and adjusted to fit the individual organisation and its work procedures. The following can be configured in cooperation with cBrain:

- Select a default setup for editing the FOI request report. The "Edit FOI Request" dialogue can be set up with a configuration that applies to the entire F2 installation. This means that FOI request reports are generated using the same setup by default. However, the individual user can still adjust a given FOI request report.
- Add a filter that automatically removes unwanted content before the FOI request report is generated. This may be records or file content with a certain title.
- Decide that requests and annotations are excluded when a new FOI request is created or when new records are added to an existing FOI request.
- Define an empty record document in F2. A record document without text becomes an empty page in a FOI request report. This can be avoided if the organisation creates an empty record document definition. In this case, F2 will automatically remove pages from the FOI request report that would have been empty. This filter is invisible to the users.
- Decide the text of the black bar at the top of appendices of the FOI request report.
- Define a standard layout for the FOI request report including a standard front page.
- Include a front page in the FOI request report with a list of contents.
- Choose between multiple different FOI request templates.
- Add page numbers in the FOI request report. The format of the page numbering is configurable.
- Display page numbers as roman numerals.
- Configure the format of title bookmarks for records, cases, documents, requests, and annotations in the PDF when an FOI request report is generated. Bookmarks may also be omitted.
- Add a bookmark for a group of records not associated with a case in the PDF when generating an FOI request report.



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