F2

FOI Request, Advanced

Version 8

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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 report 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 report.

Working with FOI requests

This section provides an introduction to working with FOI requests in F2. The section explains how to create a new FOI request, how to understand the foundation of an FOI request, and how to access ongoing and complete FOI request cases.

Create 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 by holding down the **Ctrl** key while clicking on the relevant records. Then click on **New FOI Request** in the main window's ribbon or use the context menu, select **New** and then **New FOI request**.

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.

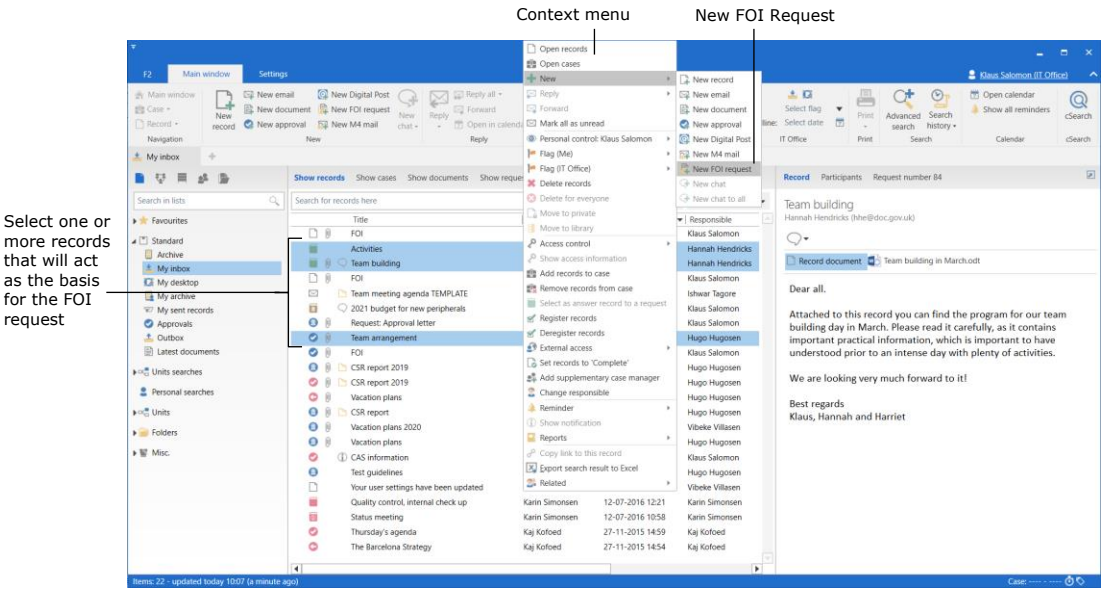


Figure 1: Create a new FOI request from the main window

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

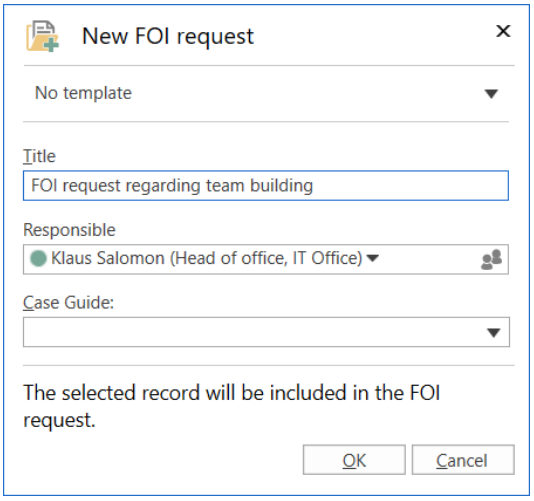


Figure 2: The "New FOI Request" dialogue

> **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 "FOI" tab 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.

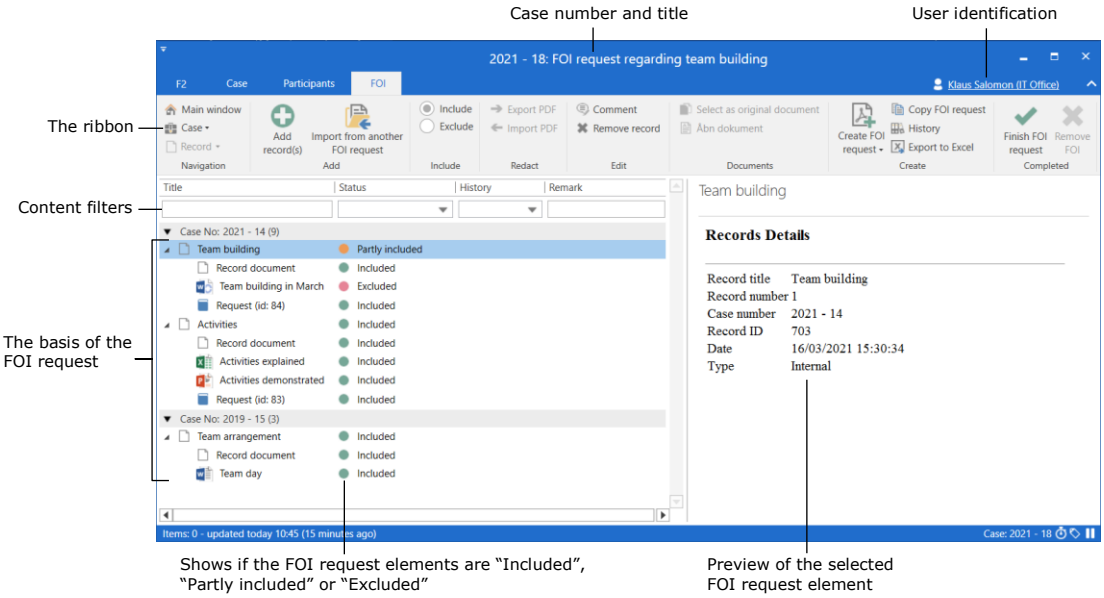


Figure 3: The "FOI" tab in the case window

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.

The result list below the ribbon of the "FOI" tab contains 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. Furthermore, in the result list, unique column settings can be configured as needed. Use the content filters below 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.

Ongoing and completed FOI request cases

This section explains how ongoing and completed FOI request cases are accessed in the main window.

FOI request cases are accessed from the navigation bar on the left side of 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 context menu options for finished FOI request cases are the same as for active ones.

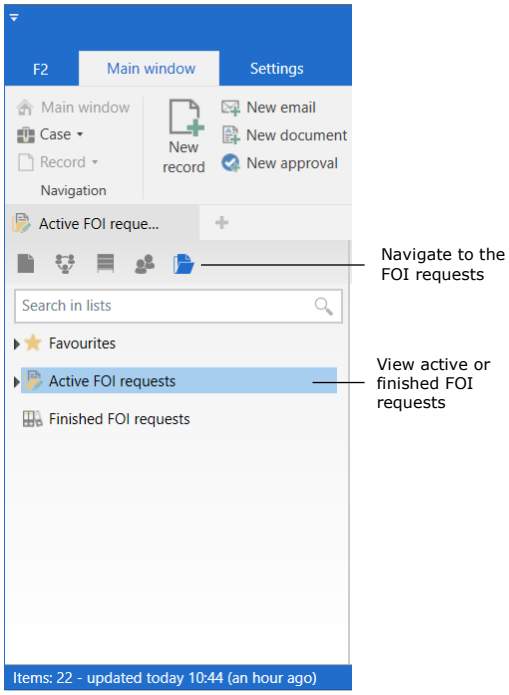


Figure 4: Navigate to active and completed FOI requests in the main window

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.

Menu items on the "FOI" tab

The menu items for working with an FOI request are located in the ribbon of the "FOI" tab.

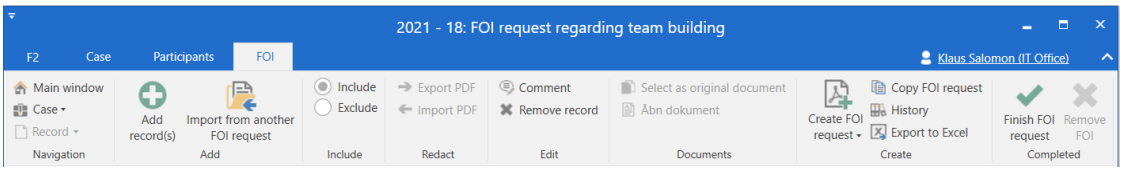
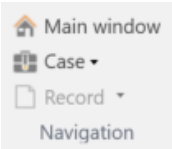
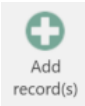
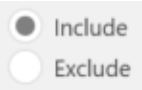
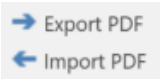
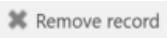
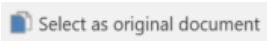
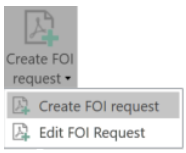
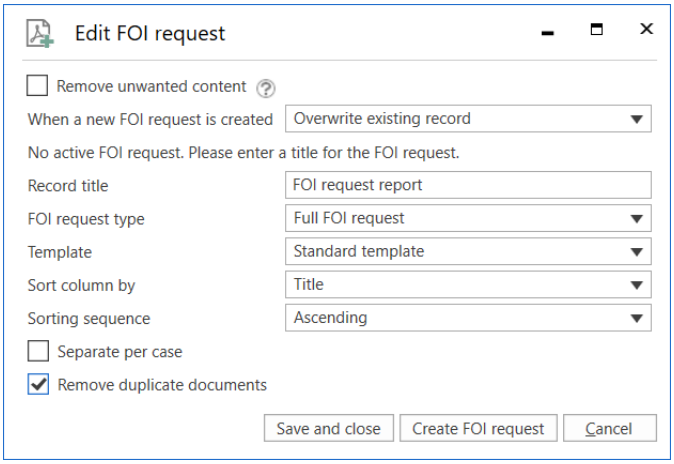
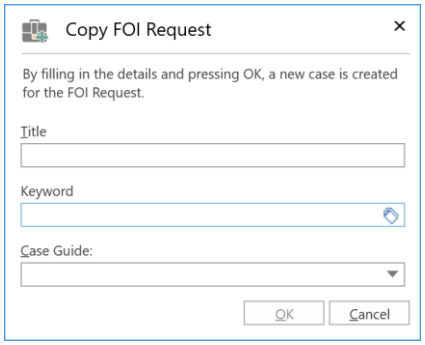
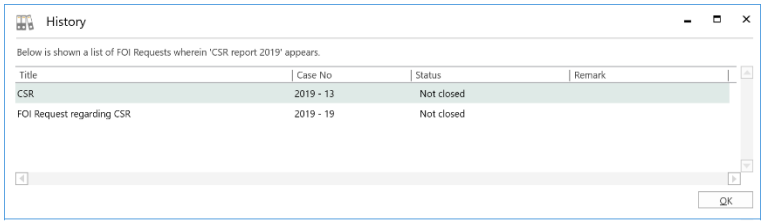
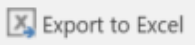
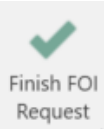
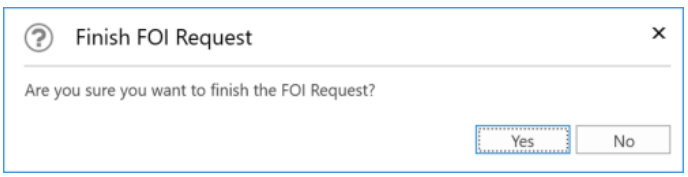


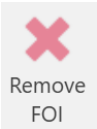
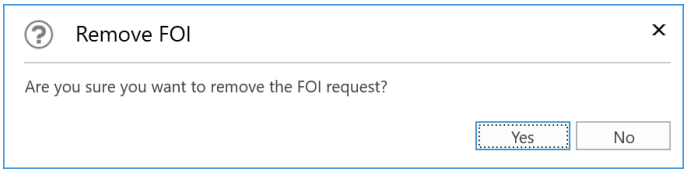
Figure 5: The "FOI" tab in the case window

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

Function	Description
	Navigate between the main, case, and record windows by clicking on the corresponding menu item. 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. For more information about adding records, see the section *Adding records to an FOI request*.
	Import records and FOI request elements from another FOI request. For more information about importing from another FOI request, see the section *Import from another FOI request*.
	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 *Include or exclude elements* section.
	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.

Function	Description
	For more information about exporting and importing elements, see the *Export and import elements* section.
	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 *Add comment* section.
	To remove a record from the basis of the FOI request, select the record and click on **Remove record**. The record and all its attached FOI request elements are then removed from the result list. This function is useful if a record has accidentally been included in the FOI request.
	The chosen document is selected as the original document for duplicates (identical documents). For more information about duplicates, see the *Show duplicates* section.
	The chosen document is opened from the result list by selecting the relevant FOI request element and then clicking on **Open document** or pressing **Enter**.
	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:  **Figure 6: The "Edit 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.

Function	Description
	For more information on creating and editing the FOI request report, see the sections *Create an FOI request report* and *Edit the FOI request report*.
	Click on **Copy FOI request** to copy the FOI request to another case using the dialogue displayed below.  **Figure 7: The "Copy FOI request" dialogue**
	Once a record is selected from the result list, the **History** item becomes active. Click on it to open a dialogue that shows if the record is a part of other FOI requests.  **Figure 8: The "History" dialogue** **Note**: The "History" column, if visible in the result list, also shows whether the record is a part of other FOI requests.
	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.  **Figure 9: The "Finish FOI Request" dialogue**

Function	Description
	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.  **Figure 10: 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 **Add records** in the "FOI" tab.

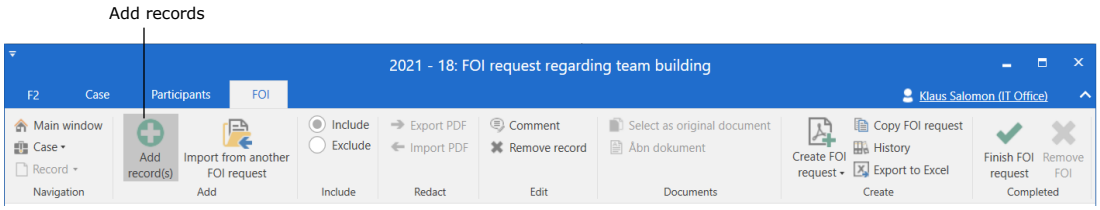


Figure 11: Add records

The "Choose records" search window opens, and the relevant 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**.

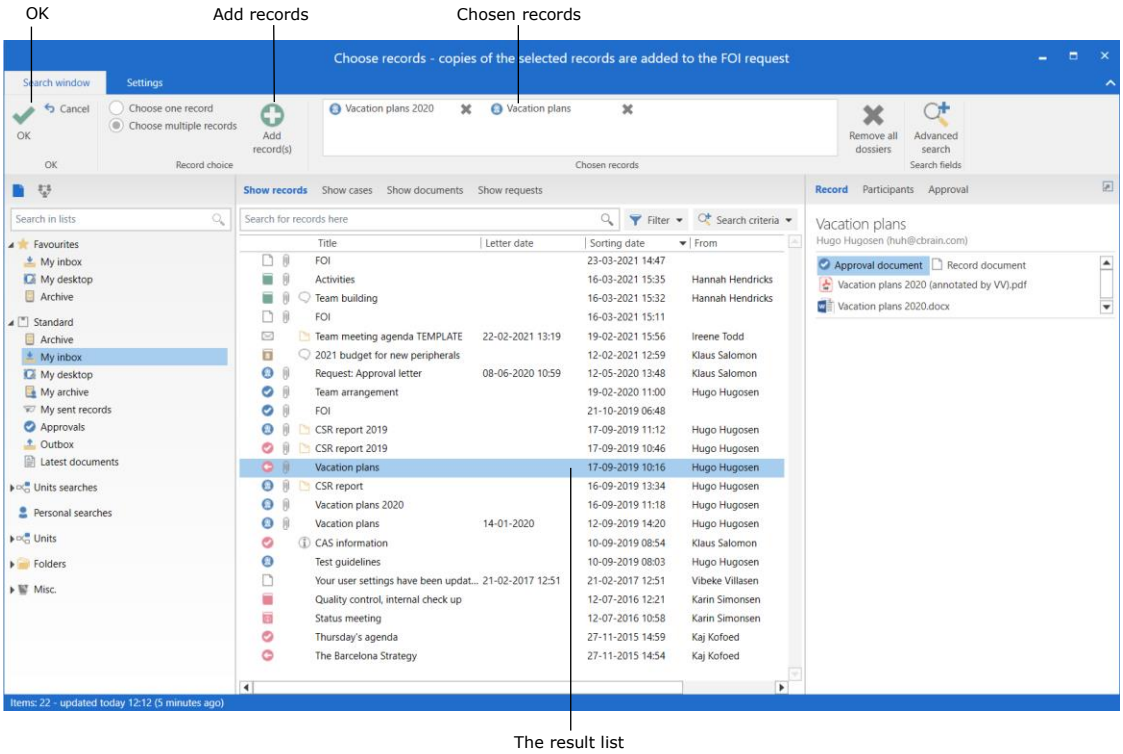


Figure 12: The "Choose records" search dialogue

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.

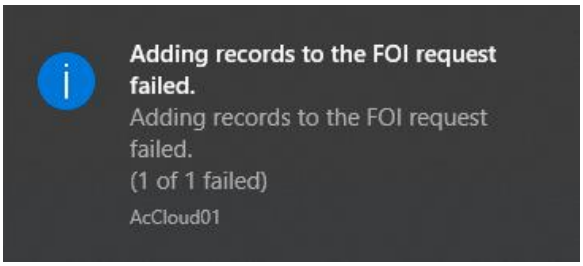


Figure 13: Validation error

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 be relevant e.g. if another office needs to contribute material to the basis of the FOI request and has created their own FOI request case.

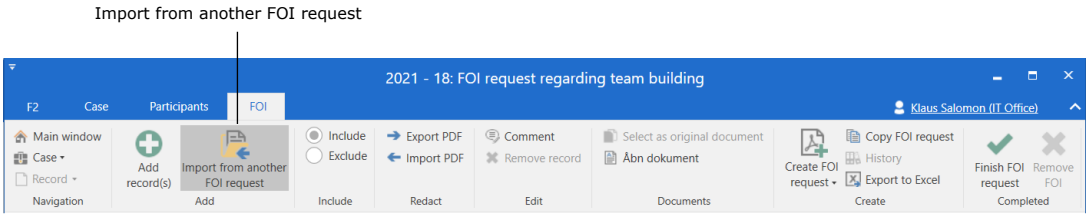


Figure 14: Import from another FOI request

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.

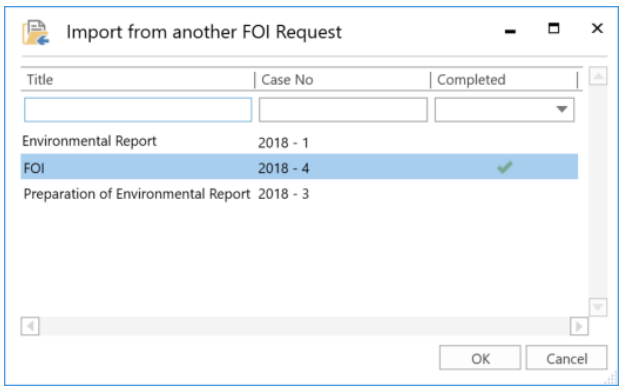


Figure 15: The "Import from another FOI request" dialogue

Records already part of the basis of the FOI request cannot be added a second time. If the imported FOI request contains records that are already part of the basis of the FOI request, a validation error message is displayed.

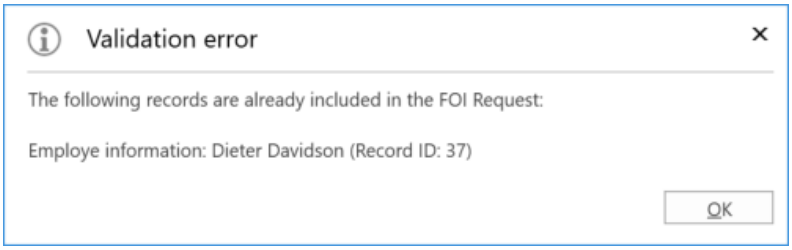


Figure 16: Validation error for "Import from another FOI request"

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 "FOI" tab. In the basis of the FOI request, it is possible to see if an element is "Included", "Partly included", or "Excluded" in the "Status" column.

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

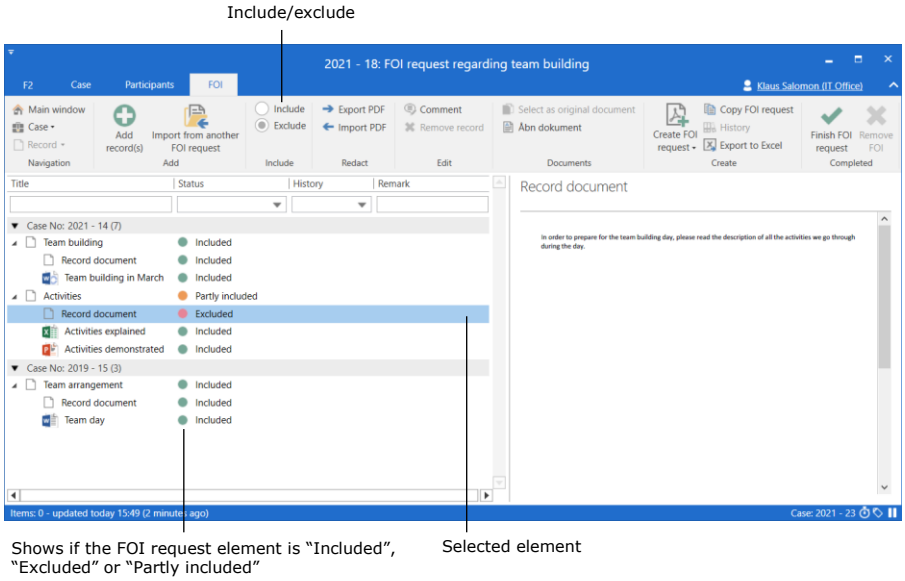


Figure 17: Include/exclude element

Export and import elements

An FOI request element must be exported from F2 in order 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**.

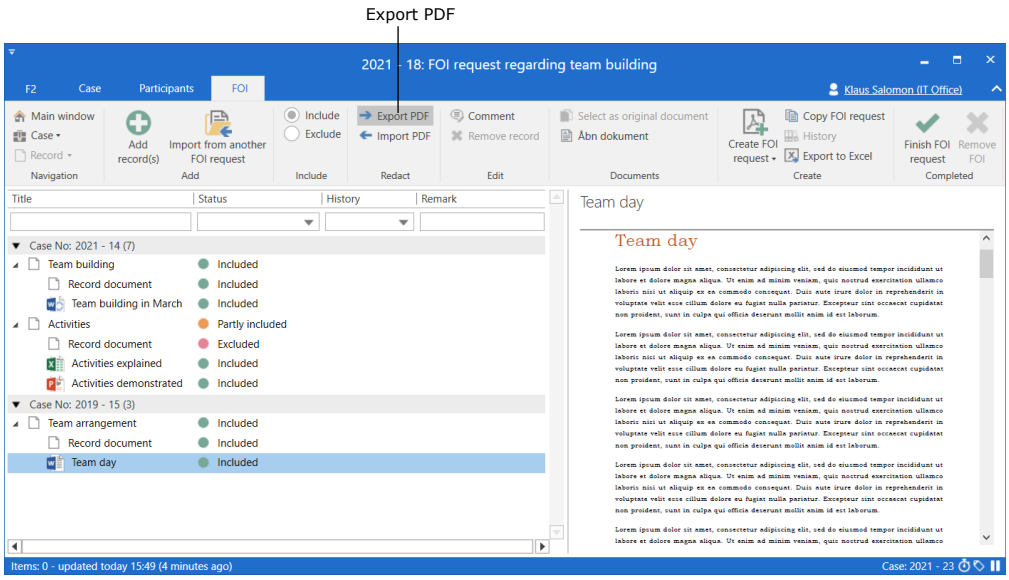


Figure 18: Export PDF

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.

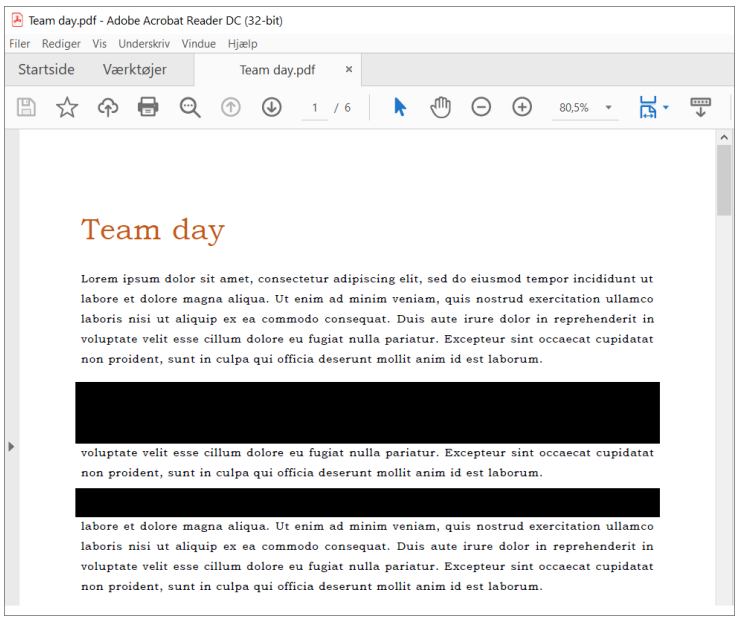


Figure 19: Edit PDF

> **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**.

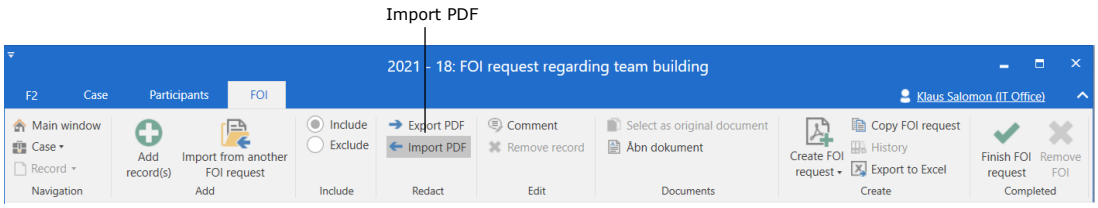


Figure 20: Import a PDF

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.

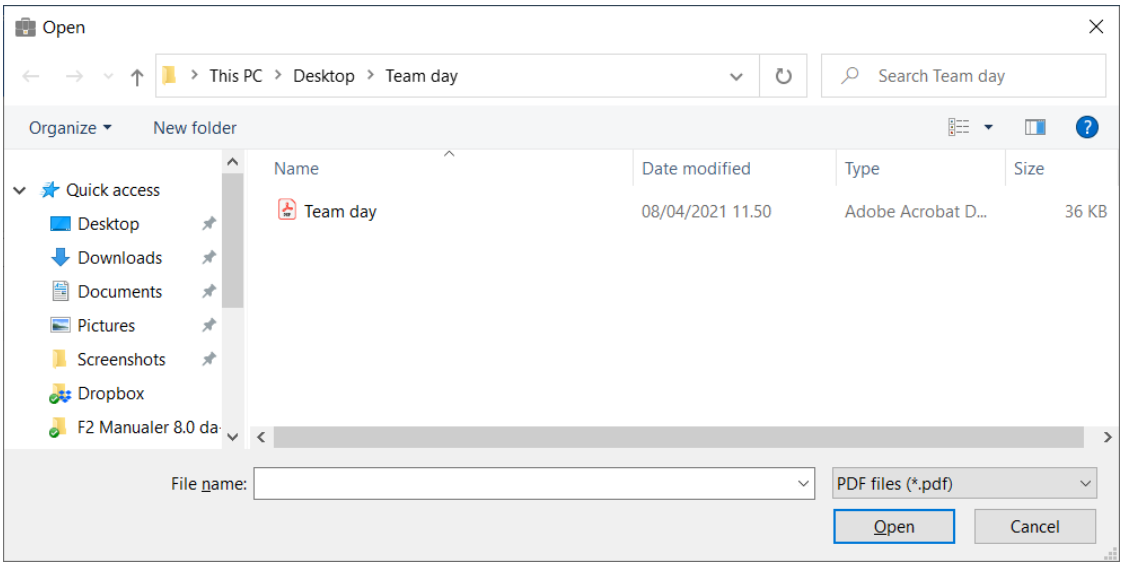


Figure 21: Select the edited element from a location on the PC

Once the edited element is imported, it appears in the basis of the FOI request along with the 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.

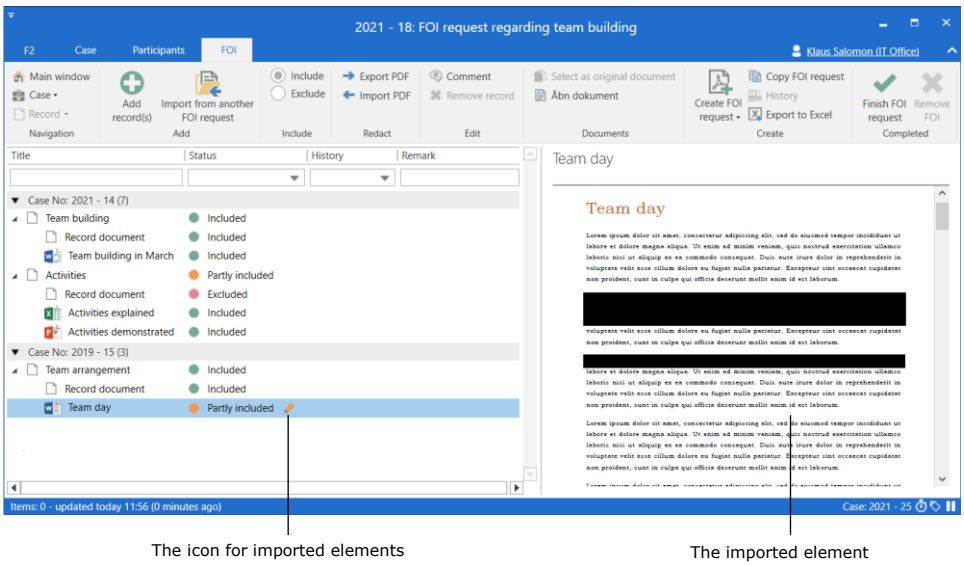


Figure 22: The imported element in the basis of the FOI request

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.

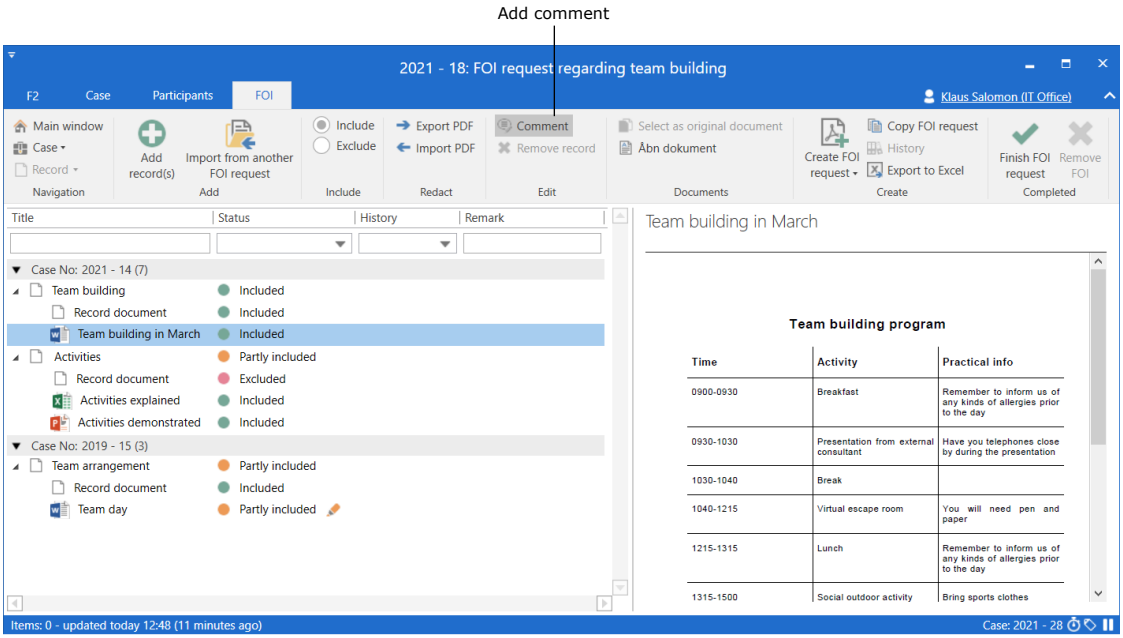


Figure 23: Add comment

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 save it.

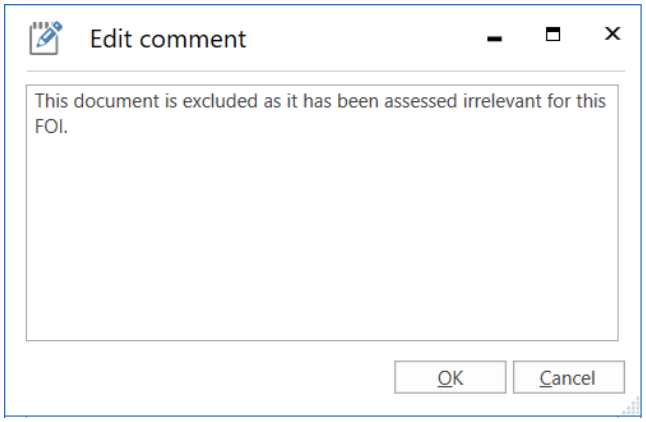


Figure 24: The "Edit comment" dialogue

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

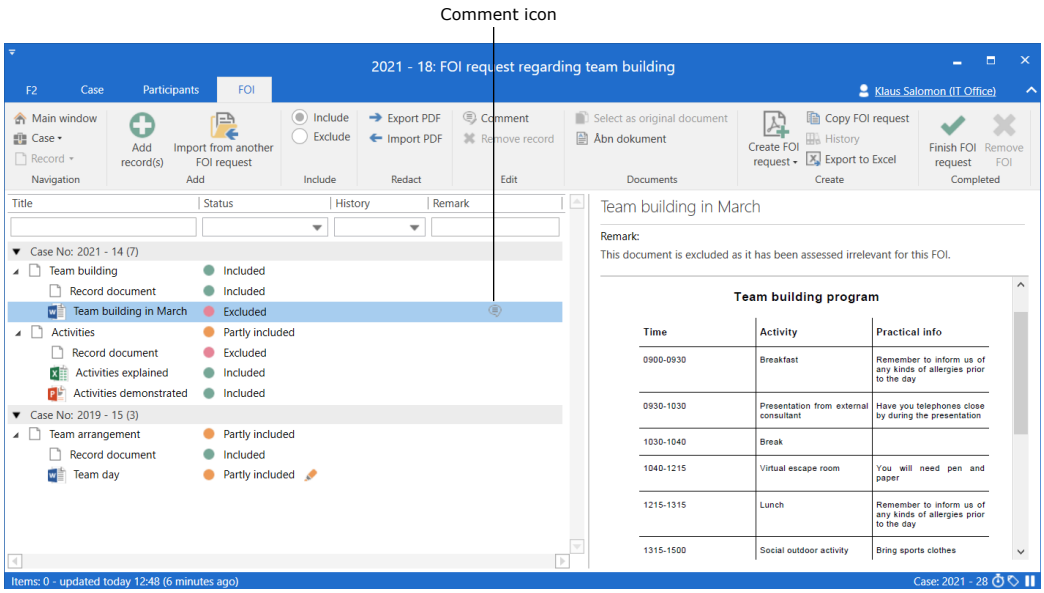


Figure 25: A comment in the basis of the FOI request

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 in the "Comment" field. 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. See the example below.

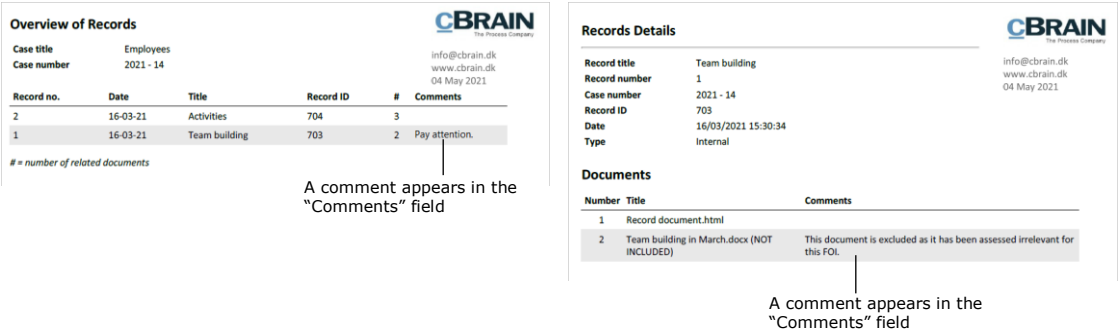


Figure 26: Example of a record with a comment

Show duplicates

F2 shows whether any identical documents (duplicates) appear in the same FOI request and appoints one of them as the original document.

In the result list the "Number of duplicates" and "Record ID for original record" columns can be added to the FOI request basis.

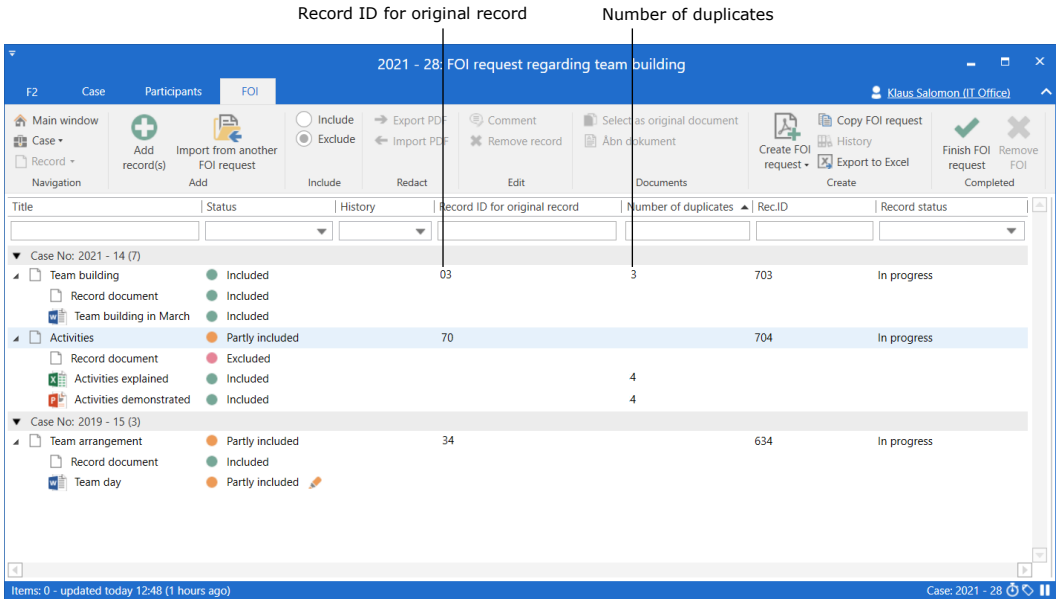


Figure 27: Display of duplicates

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 "FOI" tab.

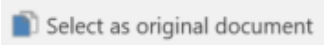


Figure 28: The "Select as original document" menu item

Remove duplicates (add-on)

Duplicates can be removed from the FOI request report by clicking on the **Create FOI request** drop-down menu and then on **Edit FOI request**.

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

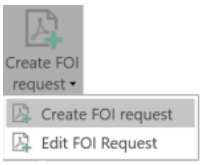


Figure 29: The "Create FOI request" menu item

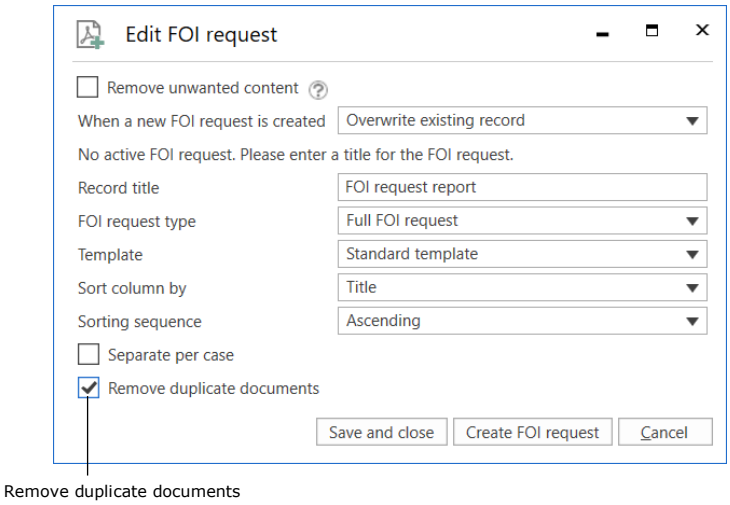


Figure 30: The "Edit FOI request" dialogue

F2 FOI Request, Advanced can be configured so the "Remove duplicate documents" checkbox is ticked by default. Configurations are made in cooperation with cBrain.

Information about duplicates in the FOI request report

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

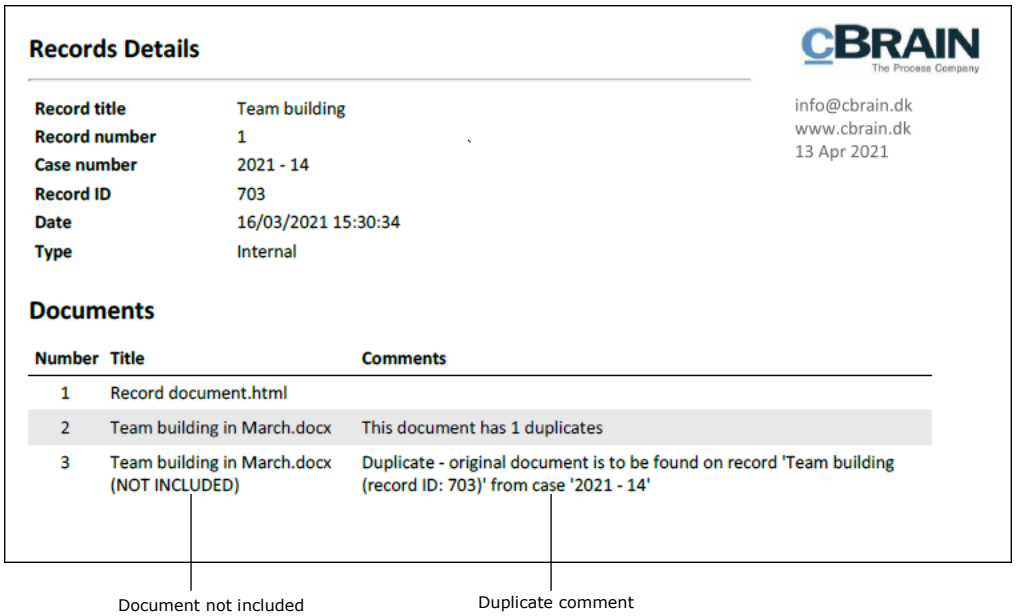
Information regarding duplicates is displayed in the FOI request report types that contain documents:

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

Read more about the different types of FOI request reports in the section *Detail levels for the FOI request report*.

In the "Record details" section of the original document, the number of duplicates is listed. 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.

An example of duplicate comments in an FOI request report is shown in the figure below.



Records Details

Record title	Team building
Record number	1
Case number	2021 - 14
Record ID	703
Date	16/03/2021 15:30:34
Type	Internal

info@cbrain.dk
www.cbrain.dk
13 Apr 2021

Documents

Number	Title	Comments
1	Record document.html	
2	Team building in March.docx	This document has 1 duplicates
3	Team building in March.docx (NOT INCLUDED)	Duplicate - original document is to be found on record 'Team building (record ID: 703)' from case '2021 - 14'

Document not included

Duplicate comment

Figure 31: FOI request report

Working with the FOI request report

This section explains how an FOI request report is created upon the basis of an FOI. Additionally, it is described how an FOI request report can be edited according to different detail levels.

Create an FOI request report

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

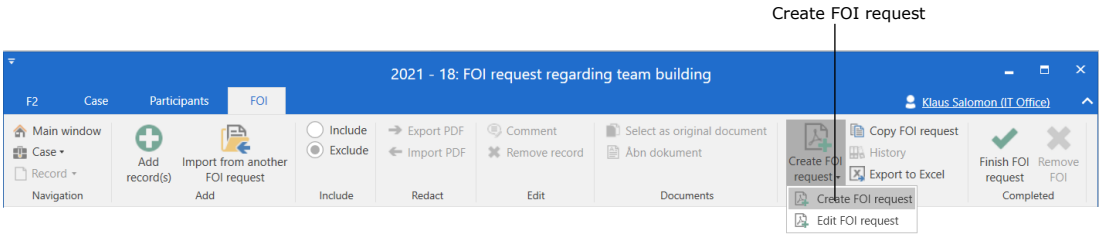


Figure 32: Create FOI request

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

Figure 33: The status bar

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

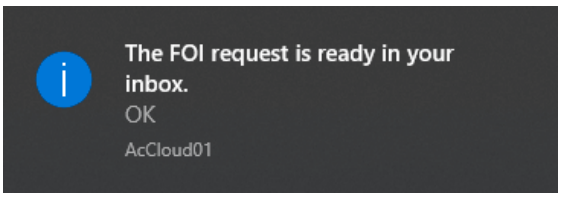


Figure 34: Message regarding the ready FOI request

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

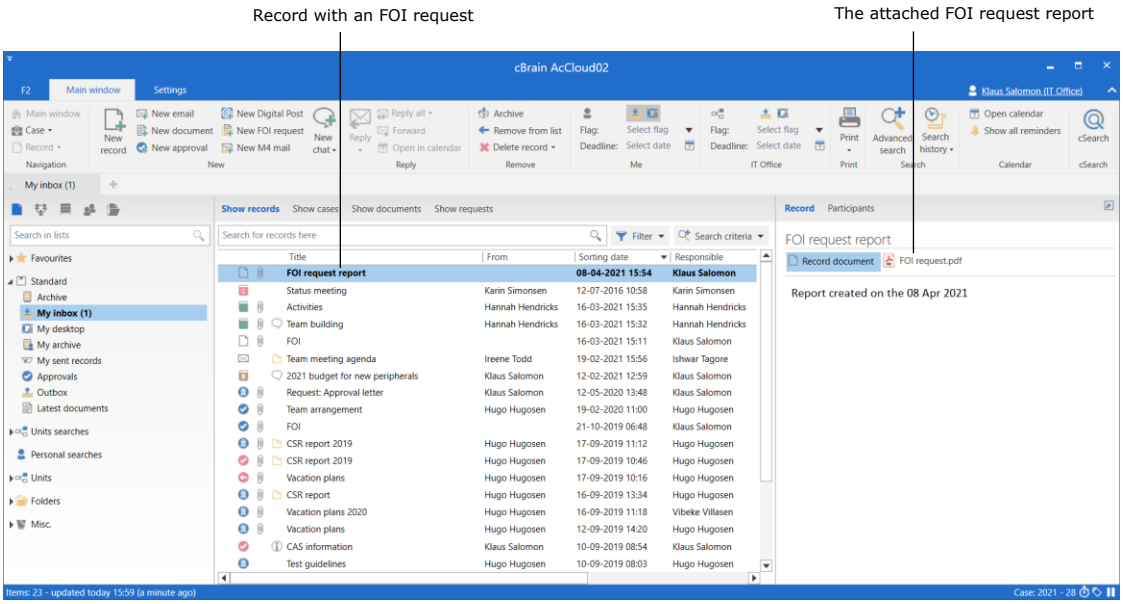


Figure 35: The FOI request report in an inbox

A new FOI request report can be created if further editing or 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 F2 Approvals add-on module. Read more about FOI requests and F2 Approvals in the section *Send the FOI request for approval*.

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 detail levels for the included records and FOI request elements. For further information on adjusting the FOI request report, see the section *Edit the FOI request report.*

Overview of Records

cBRAIN The Process Company

Case title Team coordination
Case number 2019 - 14

info@cbrain.dk
www.cbrain.dk
04 May 2021

Record no.	Date	Title	Record ID	#	Comments
5	04-05-21	Assignments in Department X	736	2	
3	04-05-21	Code of Conduct	734	2	
4	04-05-21	Personnel politics	735	2	

 # = number of related documents

Figure 36: 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 *Edit the FOI request report*.
"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.
"#"	The "#" field shows how many related documents that are attached to the record. This includes 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 *Add* comment section.

Edit 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.

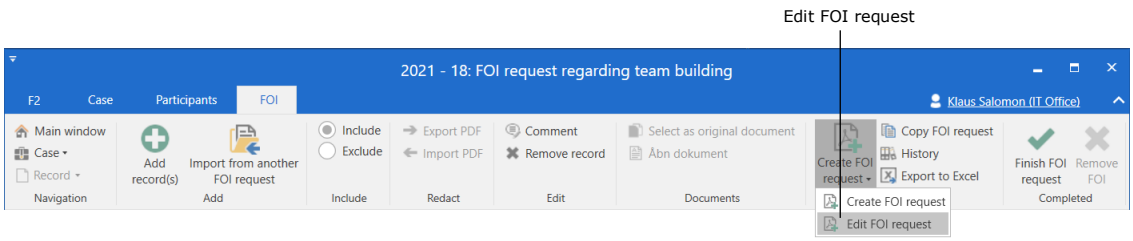


Figure 37: Edit FOI request

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

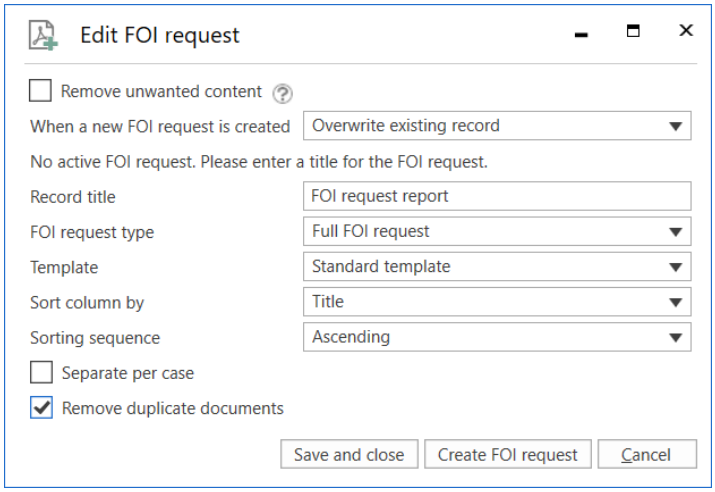
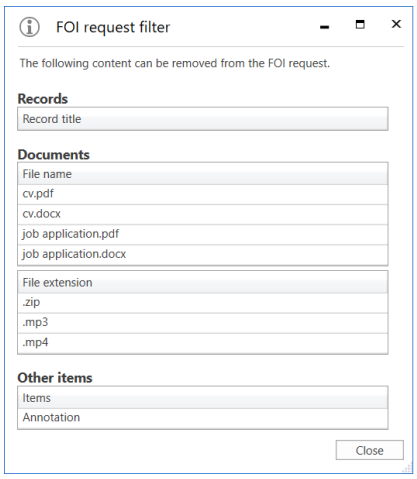
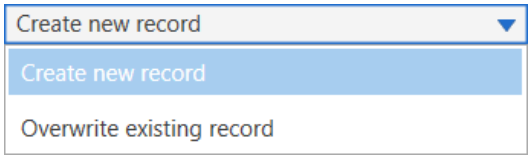
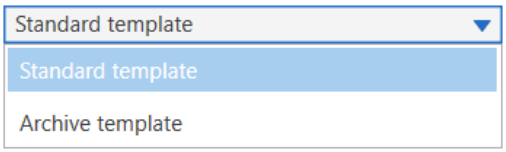


Figure 38: The "Edit FOI request" dialogue

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

Function	Description
"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.  **Figure 39: FOI request filter**

Function	Description
"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.  **Figure 40: Drop-down menu for the field "When a new FOI request is created"**
"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*.
"Template"	Select a template on which to base the report. A standard template is the default choice. If the FOI request report must adhere to a specific template customised to the single organisation, it is chosen here.  **Figure 41: Drop-down menu for the field "Template"** **Note**: Only one template is available by default. The drop-down menu is only shown if other templates have been created. New templates are configured in cooperation with cBrain.
"Sort column"	Select the sequence by which to sort the FOI request report elements. Choose between the following columns:

Function	Description
	• Title • ID no. • Letter date • Record number.
"Sort sequence"	Sort the chosen column by the following values: • Ascending • Descending.
"Separate per case"	If this box is ticked, the FOI request report's contents are separated by 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 *Remove duplicates (add-on)* section.

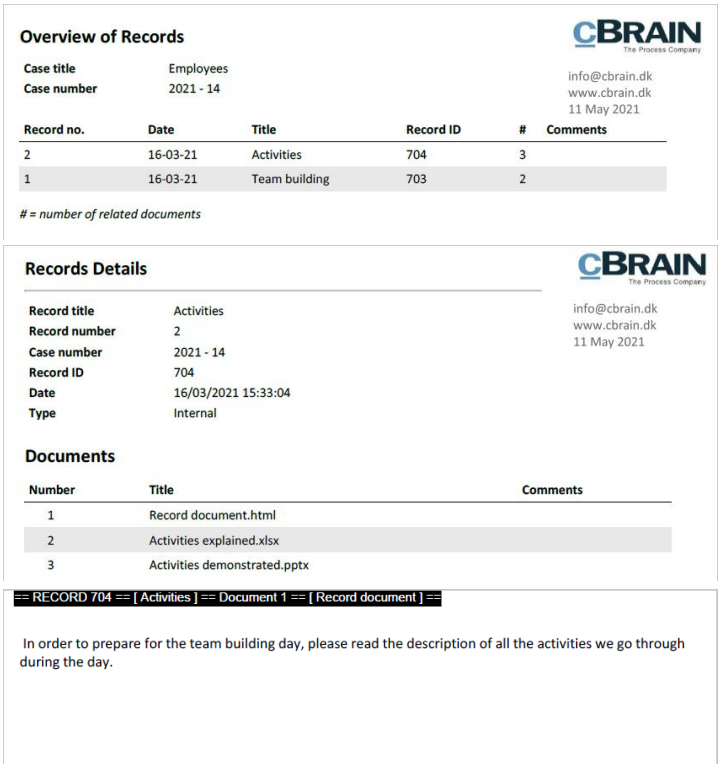
Detail levels for the FOI request report

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.



Overview of Records

Case title	Employees
Case number	2021 - 14

info@cbrain.dk
www.cbrain.dk
11 May 2021

Record no.	Date	Title	Record ID	#	Comments
2	16-03-21	Activities	704	3	
1	16-03-21	Team building	703	2	

 # = number of related documents

Records Details

Record title	Activities
Record number	2
Case number	2021 - 14
Record ID	704
Date	16/03/2021 15:33:04
Type	Internal

info@cbrain.dk
www.cbrain.dk
11 May 2021

Documents

Number	Title	Comments
1	Record document.html	
2	Activities explained.xlsx	
3	Activities demonstrated.pptx	

== RECORD 704 == [Activities] == Document 1 == [Record document] ==

In order to prepare for the team building day, please read the description of all the activities we go through during the day.

Figure 42: 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 their cases. 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.

Overview of Records

Case title	Employees
Case number	2021 - 14

info@cbrain.dk
www.cbrain.dk
11 May 2021

Record no.	Date	Title	Record ID	#	Comments
2	16-03-21	Activities	704	3	
1	16-03-21	Team building	703	2	

 # = number of related documents

Records Details

Record title	Activities
Record number	2
Case number	2021 - 14
Record ID	704
Date	16/03/2021 15:33:04
Type	Internal

info@cbrain.dk
www.cbrain.dk
11 May 2021

Documents

Number	Title	Comments
1	Record document.html	
2	Activities explained.xlsx	
3	Activities demonstrated.pptx	

Records Details

Record title	Team building
Record number	1
Case number	2021 - 14
Record ID	703
Date	16/03/2021 15:30:34
Type	Internal

info@cbrain.dk
www.cbrain.dk
11 May 2021

Documents

Number	Title	Comments
1	Record document.html	
2	Team building in March.docx	

Figure 43: 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.

Overview of Records

Case title	Employees
Case number	2021 - 14

info@cbrain.dk
www.cbrain.dk
11 May 2021

Record no.	Date	Title	Record ID	#	Comments
2	16-03-21	Activities	704	3	
1	16-03-21	Team building	703	2	

 # = number of related documents

Overview of Records

Case title	Team events
Case number	2019 - 15

info@cbrain.dk
www.cbrain.dk
11 May 2021

Record no.	Date	Title	Record ID	#	Comments
1	17-09-19	Team arrangement	634	2	

 # = number of related documents

Figure 44: 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 their cases. 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.

FOI Request Report Overview

info@cbrain.dk
www.cbrain.dk
11 May 2021

2021 - 14: Employees

Record no.	Date	Title	Record ID	#	Comments
2	16-03-21	Activities	704	3	
1	16-03-21	Team building	703	2	

 # = number of related documents

2019 - 15: Team events

Record no.	Date	Title	Record ID	#	Comments
1	17-09-19	Team arrangement	634	2	

 # = number of related documents

Records not on a case

Record no.	Date	Title	Record ID	#	Comments

 # = number of related documents

Figure 45: Example of a compact FOI request report

Send the FOI request for approval

Using the add-on module F2 Approvals, an FOI request report 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 what was included and excluded (i.e. the FOI request case).

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

The "New approval for [record name]" dialogue opens and the user enters the relevant information.

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

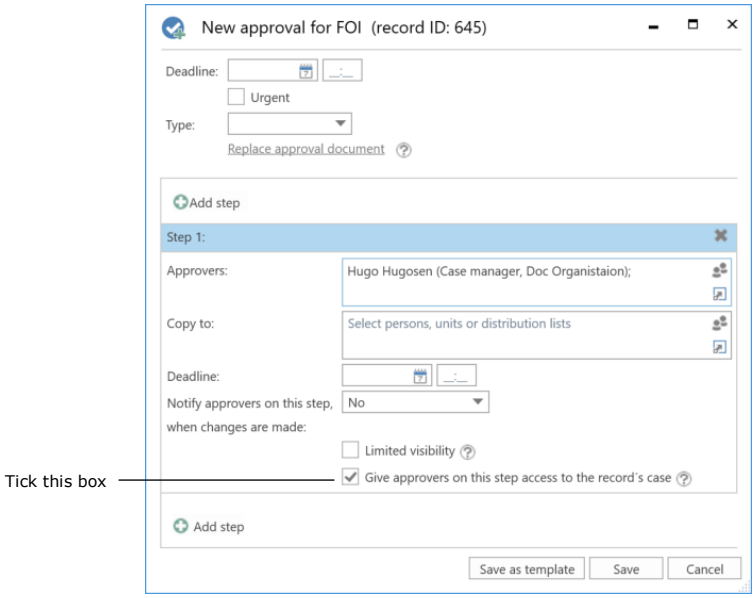


Figure 46: Give approvers access to the FOI request report

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 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.

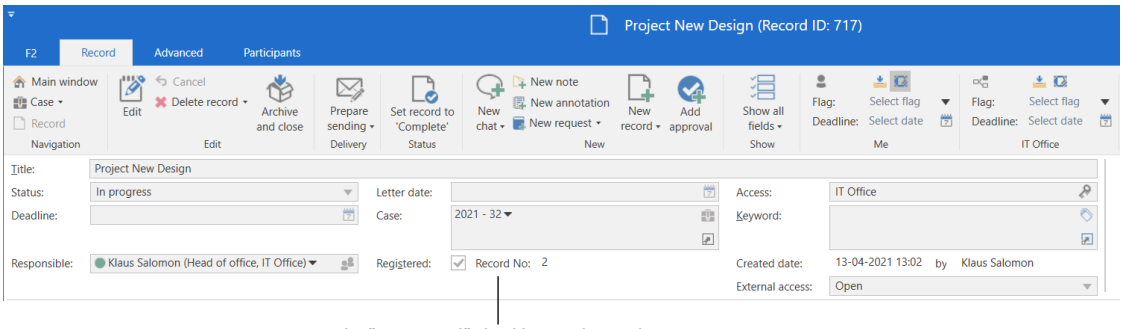
For more information about approval flows, see *F2 Approvals – User manual*.

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

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



The "Registered" checkbox and record no.

Figure 47: Registering a record

Records are assigned record numbers in the order 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 its original number.

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.

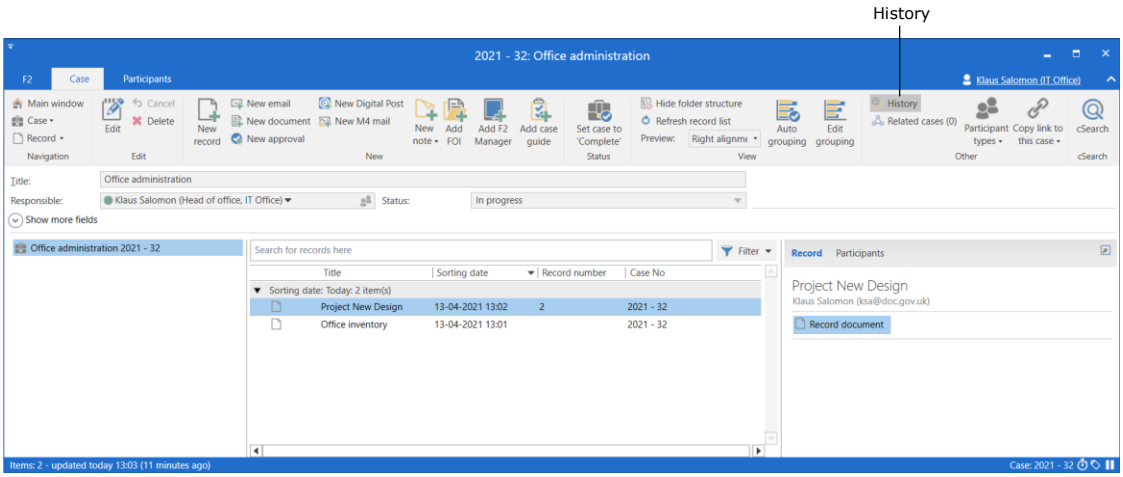


Figure 48: The case history in the case window

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 a record has been deregistered. The fields below the column names can be used to filter the display of the case history by e.g. entering text into the "Description" field.

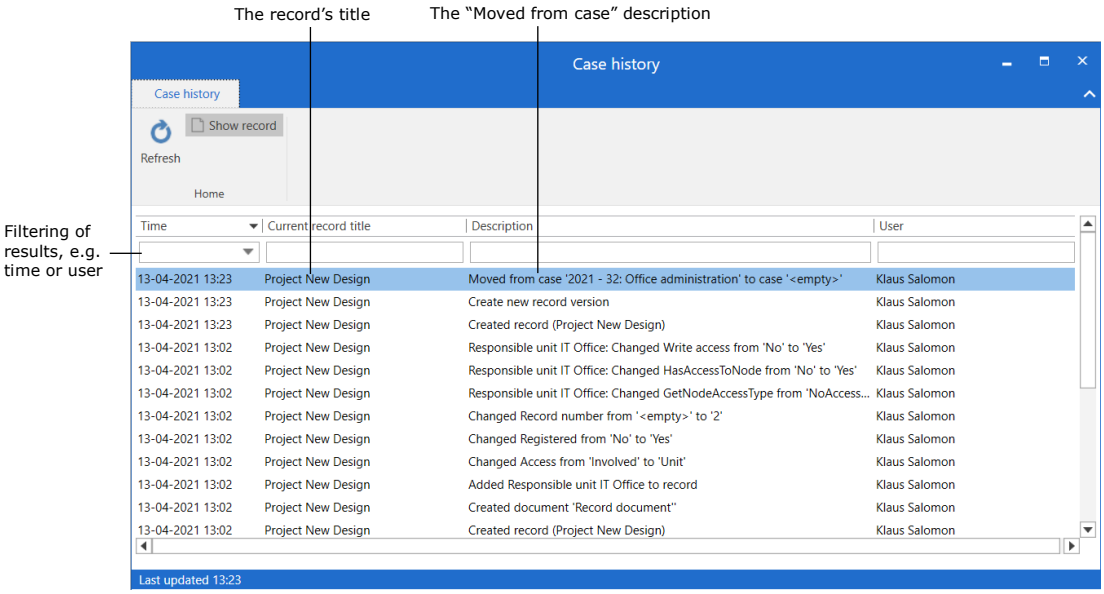


Figure 49: The "History" dialogue

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

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.
- Choose to exclude requests and annotations 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 an 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 users.
- Specify the text of the black bar at the top of appendices of the FOI request report.
- Define a default layout for the FOI request report including a default 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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