



**F2**

FOI Request

Version 9

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## Reading guide

This manual is written for users of F2 FOI Request.

The manual contains a short introduction to F2 FOI Request 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

F2 FOI Request meets the need of being able to create Freedom of Information request reports.

The report contains materials from cases, records, and documents. The user decides what to include or exclude. The F2 FOI Request module ensures a complete numbering of the records, so all involved participants can see if anything has been excluded.

Generating the FOI request report starts by selecting the relevant records. The content of the report can then be adjusted by deselecting records or documents before the final version is created.

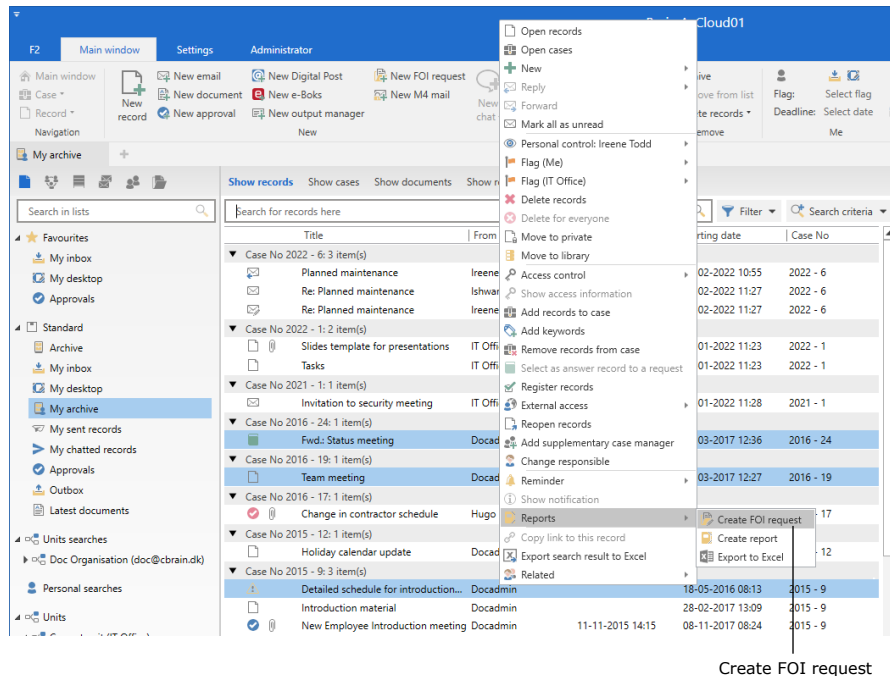
Comments can be added to the selected content down to the document level. This makes it possible to add documentation for the exclusion of certain parts of the material.

Once the relevant records are selected, F2 FOI Request automatically creates a complete FOI request report. The report is generated as a PDF file including all the relevant metadata information and documents.

# Create an FOI request

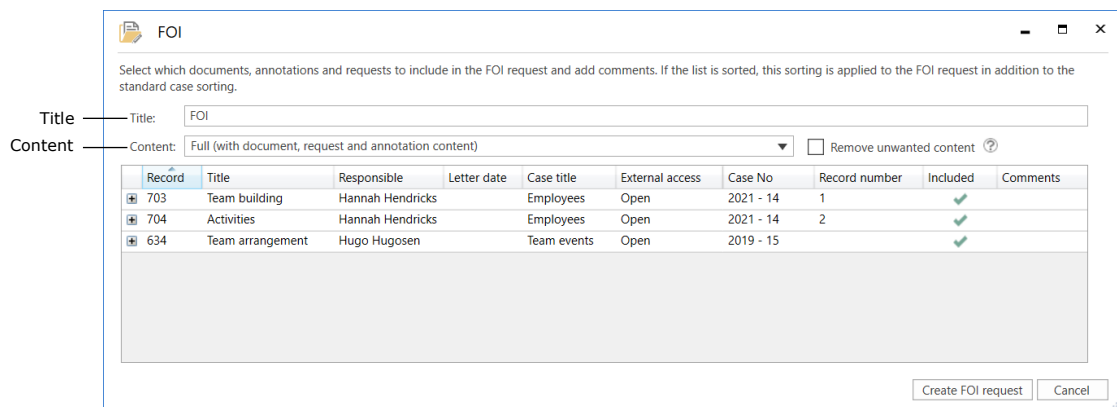
Before an FOI request can be generated, it is necessary to perform a search so the relevant records appear in the result list. See the figure below. If material from more than one case is needed, a folder may be used for collecting the material.

Hold down the **Ctrl** key and click on the relevant records to select them. Then right-click on the selection to open the context menu. Select **Reports** and click on **Create FOI request**.



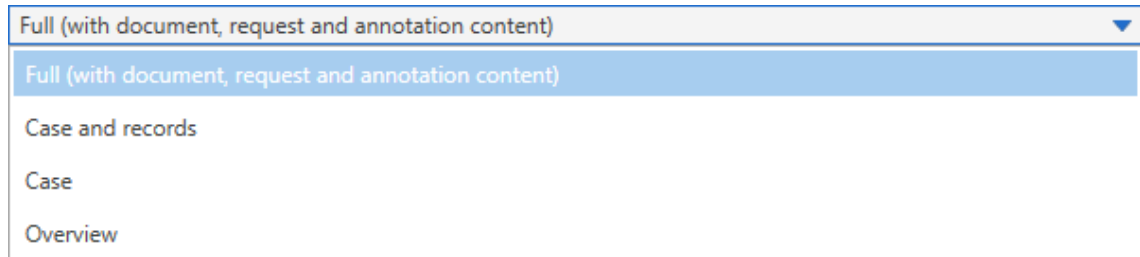
**Figure 1: Create a new FOI request from the main window**

Clicking **Create FOI request** opens the “FOI” dialogue. In this dialogue the title of the FOI request can be changed using the “Title” field.



**Figure 2: The “FOI” dialogue**

Click on the **drop-down menu** in the “Content” field to open an overview of the detail levels available when generating an FOI request report.



**Figure 3: Select the content for the FOI request**

The following detail levels are available:

- Full (with document, request and annotation content)
- Case and records
- Case
- Overview.

All detail levels contain an overview of the selected records (also called the record list). Read more about detail levels in the section *Detail levels of the FOI request report*.

The functions in the “FOI” dialogue will be elaborated in the following section.

## **Adjust FOI request report**

The following subsections describe the available options for adjusting the FOI request report in the “FOI” dialogue. The detail level and content to be included in the FOI request report are selected in the dialogue.

### **Detail levels of the FOI request report**

The FOI request report can be created with different degrees of detail. The detail level of the content of the FOI request report is chosen in the drop-down menu in the “Content” field in the “FOI” dialogue.

#### **Full overview**

To create a complete FOI request report, click on **Full (with document, request and annotation content)** in the “Content” field’s drop-down menu in the “FOI” dialogue. The report shows the selected records sorted by case.

The FOI request report contains the documents of the records and any requests and annotations.

**Overview of Records**

Case title: Team events  
Case number: 2019 - 15

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

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

# = number of related documents

---

**Records Details**

Record title: Team arrangement  
Record number: 1  
Case number: 2019 - 15  
Record ID: 634  
Date: 17-09-2019 13:59:42  
Type: Internal

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

**Documents**

Number	Title	Comments
1	Record document.html	
2	Team day.docx	

== RECORD 634 == [ Team arrangement ] == Document 1 == [ Record document ] ==

Please approve team arrangement.

---

== RECORD 634 == [ Team arrangement ] == Document 2 == [ Team day ] ==

## Team day

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**Figure 4: Example of FOI request with "Full" content**

**Note:** Record numbers only appear on relevant records if the records are attached to a case and registered.

## Case and records

To create a complete list of the selected records sorted by case, click on **Case and records** in the "Content" field's drop-down menu in the "FOI" dialogue. This detail level also provides an overview of every document, annotation and request the records contain, but not their content.

**Overview of Records**

Case title: Team events  
Case number: 2019 - 15

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

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

# = number of related documents

---

**Records Details**

Record title: Team arrangement  
Record number: 1  
Case number: 2019 - 15  
Record ID: 634  
Date: 17-09-2019 13:59:42  
Type: Internal

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

**Documents**

Number	Title	Comments
1	Record document.html	
2	Team day.docx	

**Overview of Records**

Case title: Employees  
Case number: 2021 - 14

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

Record no.	Date	Title	Record ID	#	Comments
1	16-03-21	Team building	703	3	
2	16-03-21	Activities	704	5	

# = number of related documents

---

**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  
03 jun 2021


**Documents**

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


**Figure 5: Example of FOI request with "Case and records"**

## Case

To create a complete list of the selected records sorted by case, click on **Case** in the "Content" field's drop-down menu in the "FOI" dialogue. This will create an FOI request report with one page per case. Records that are not attached to a case are listed on a separate page.

Overview of Records					
<b>Case title</b>		Team events			
<b>Case number</b>		2019 - 15			
 info@cbrain.dk www.cbrain.dk 03 jun 2021					
Record no.	Date	Title	Record ID	#	Comments
1	17-09-19	Team arrangement	634	2	
# = number of related documents					

Overview of Records					
<b>Case title</b>		Employees			
<b>Case number</b>		2021 - 14			
 info@cbrain.dk www.cbrain.dk 03 jun 2021					
Record no.	Date	Title	Record ID	#	Comments
1	16-03-21	Team building	703	3	
2	16-03-21	Activities	704	5	
# = number of related documents					


**Figure 6: Example of FOI request with "Case"**

## Overview

To create a complete overview of the selected records sorted by case, click on **Overview** in the "Content" field's drop-down menu in the "FOI" dialogue.

This will remove all unnecessary page breaks, showing a compact list of all the records. This detail level is suitable as an overview for e.g. a requestor if the extent of the material to be disclosed is still being debated.

**Note:** The FOI request report groups records by case. Records that are not attached to a case are grouped separately.

FOI Request Report Overview					
 info@cbrain.dk www.cbrain.dk 03 jun 2021					
<b>2019 - 15: Team events</b>					
Record no.	Date	Title	Record ID	#	Comments
1	17-09-19	Team arrangement	634	2	
# = number of related documents					
<b>2021 - 14: Employees</b>					
Record no.	Date	Title	Record ID	#	Comments
1	16-03-21	Team building	703	3	
2	16-03-21	Activities	704	5	
# = number of related documents					
<b>Records not on a case</b>					
Record no.	Date	Title	Record ID	#	Comments
# = number of related documents					

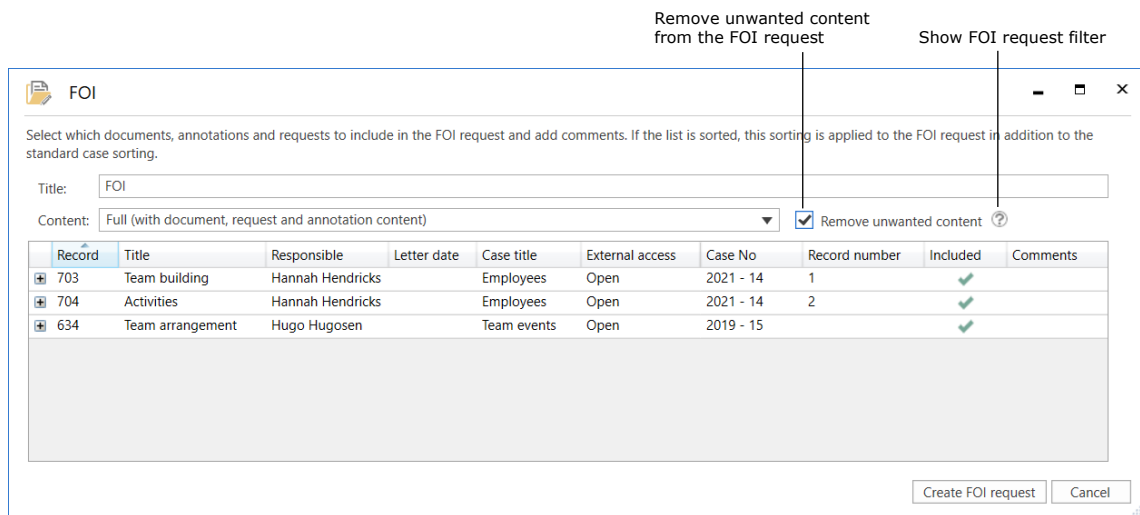
**Figure 7: Example of FOI request with "Overview"**



## Filtering unwanted content

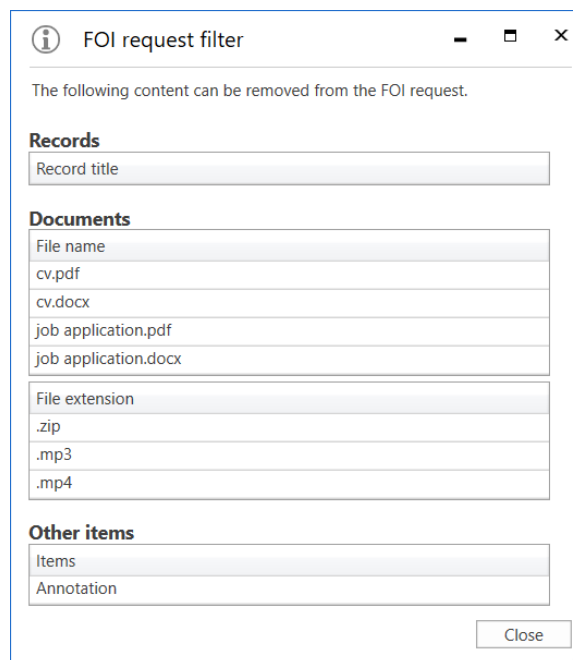
On an installation level, a filter can be applied to automatically remove unwanted content before an FOI request report is generated. Unwanted content can e.g. be records or files with a certain name.

Tick the "Remove unwanted content" box in the "FOI" dialogue to apply the filter. See the figure below.



**Figure 8: "Remove unwanted content" in the "FOI" dialogue**

Click on the **question mark icon** (?) to display an overview of what the filter will remove. See the example below.



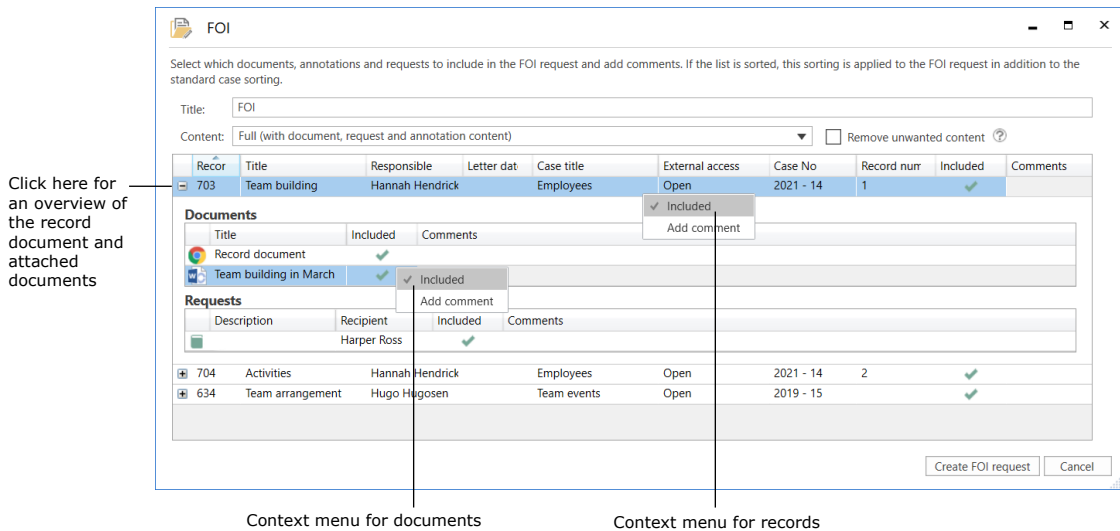
**Figure 9: The FOI request filter**

The configuration of the content removal is performed in cooperation with cBrain.

## Exclude content

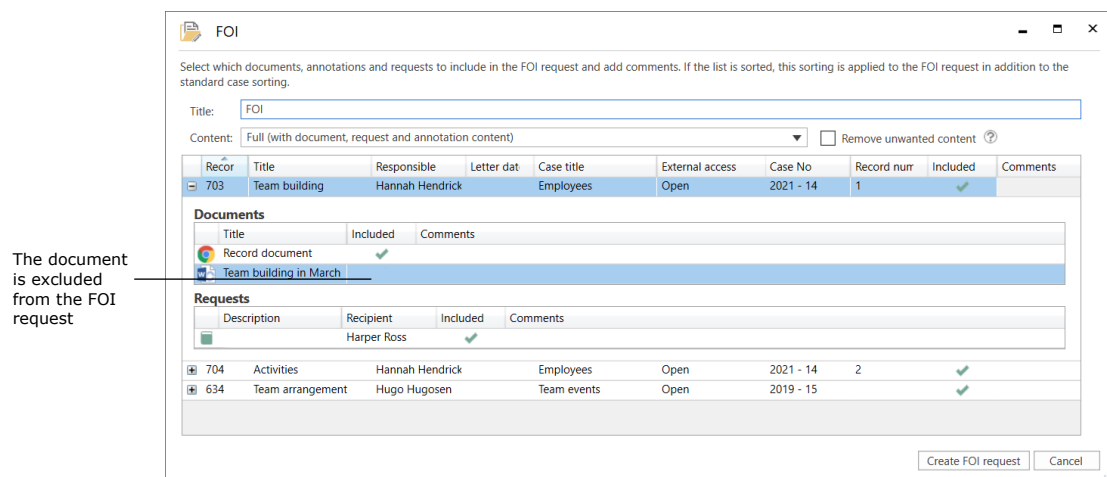
In the "FOI" dialogue, it is possible to manually deselect the records, requests, annotations, or the documents that must be excluded from the FOI request report.

To exclude an element such as a record from the FOI request report, right-click on it. Then, using the context menu, click the check mark next to "Included" to remove it. The unwanted element is then excluded from the FOI request report.



**Figure 10: Right-click element to exclude it from the FOI request report**

When the check mark is removed in the context menu, it is reflected in the "FOI" dialogue. See the figure below.



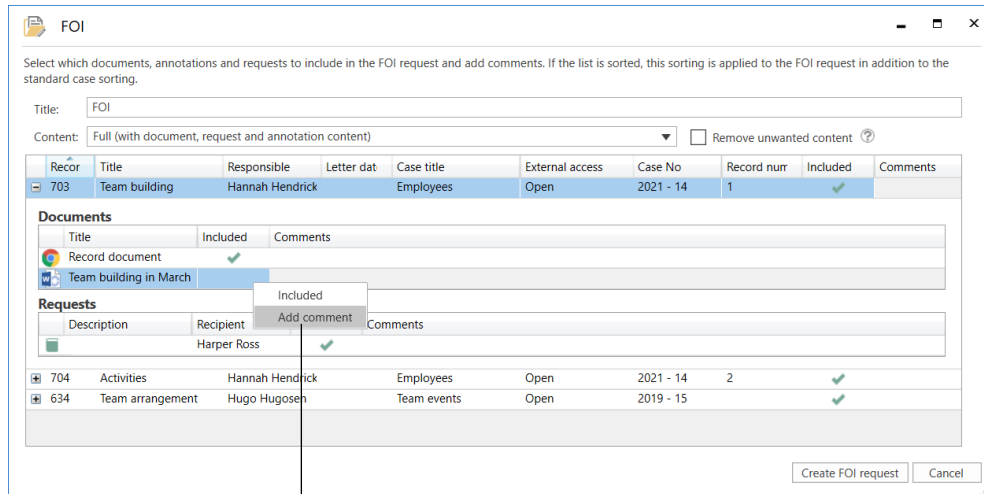
**Figure 11: A document is excluded from the FOI request report**

## Add comment

Comments can be added to the FOI request report by right-clicking on a record or document. The comment field can be used to state the reason for excluding a

record, request or document. This may be necessary when dealing with sensitive personal data.

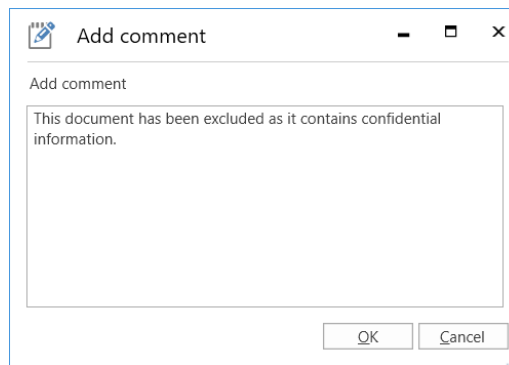
Add a comment by selecting a record, request or document, right-clicking on it and then selecting **Add comment**.



Add a comment to the document in the FOI request

**Figure 12: Add a comment to the FOI request report**

A new dialogue opens in which the comment can be written. Click on **OK** when finished.



**Figure 13: The "Add comment" dialogue**

The comment appears in the comment column in the record overview.

### Record details

---

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

### Documents

Number	Title	Comments
1	Record document.html	
2	Team building in March.docx (NOT INCLUDED)	This document has been excluded as it contains confidential information.
3	Request (ID: 84)	

**CBRAIN**  
The Process Company

info@cbrain.dk  
www.cbrain.dk  
03 jun 2021

Comment added

**Figure 14: Comment added in FOI request report**

### Delete or edit a comment

An added comment can be deleted or edited before creating the FOI request report.

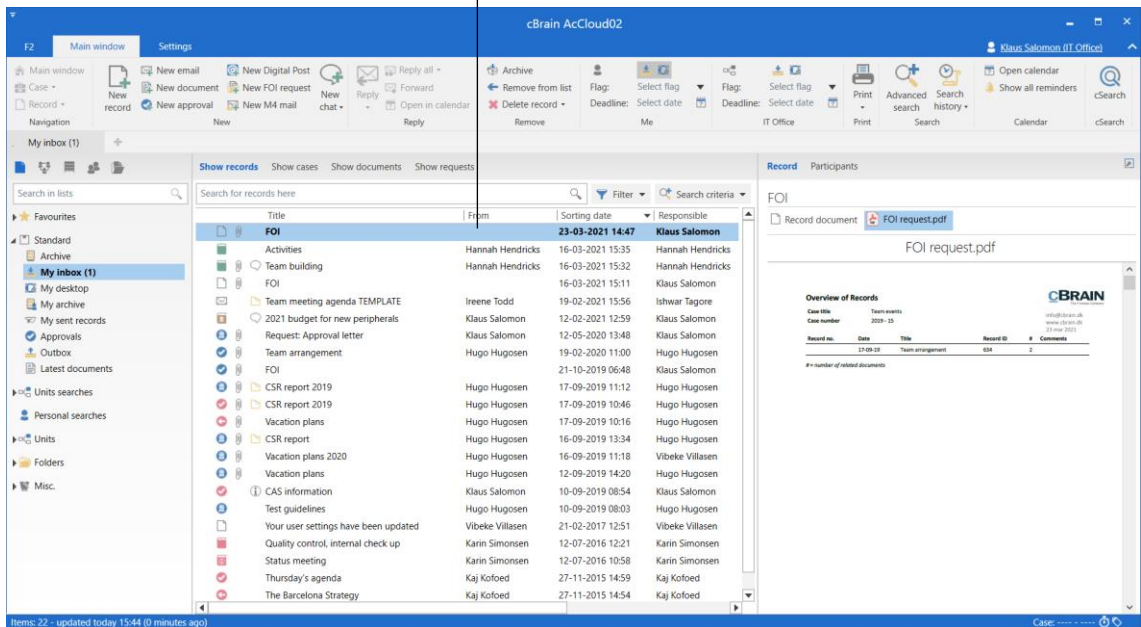
The following describes how to delete or edit the comment.

- In the context menu, click on **Add comment** on the relevant record, request or document.
- The dialogue with the comment opens.
- Delete the entire comment, or edit the text.
- Click on **OK** to finish.

### The final FOI request report

Once the desired content for the FOI request is selected, click on **Create FOI request** in the "FOI" dialogue. When F2 has generated the FOI request, the user receives the FOI request report as an unread record in "My inbox".

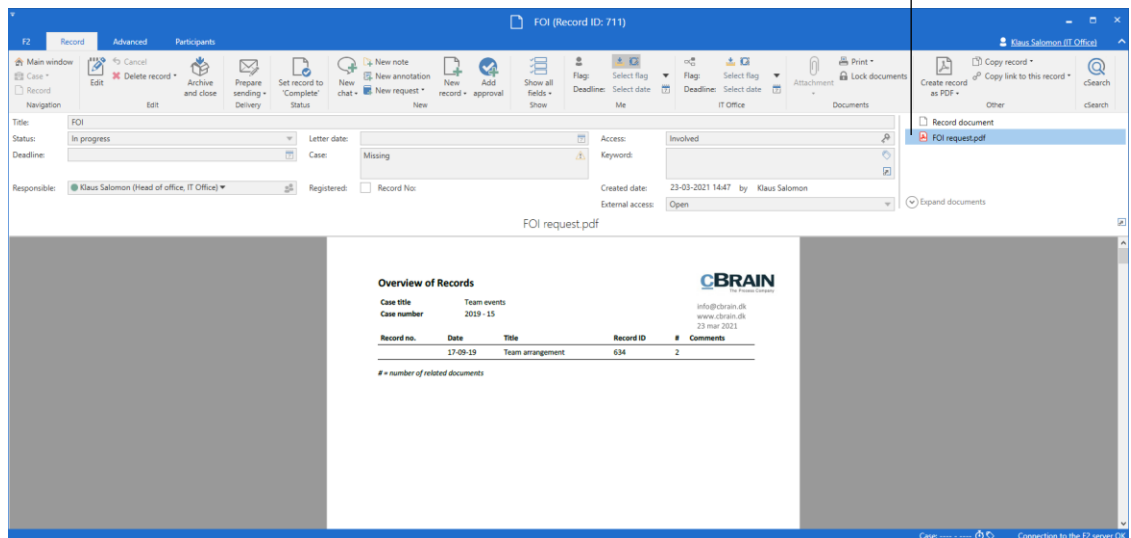
The FOI request report is received as unread record



**Figure 15: The FOI request report in "My inbox"**

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

Attached FOI request report



**Figure 16: A record containing a generated FOI request report**

The user can process the record containing the FOI request report as any other record. The user can e.g. send it or allocate the responsibility to a colleague or even perform extractions in an external programme such as Adobe Reader.

Extraction means the user can redact parts of the text that are confidential, resulting in information being left out of the FOI request report before it is sent to the recipient.

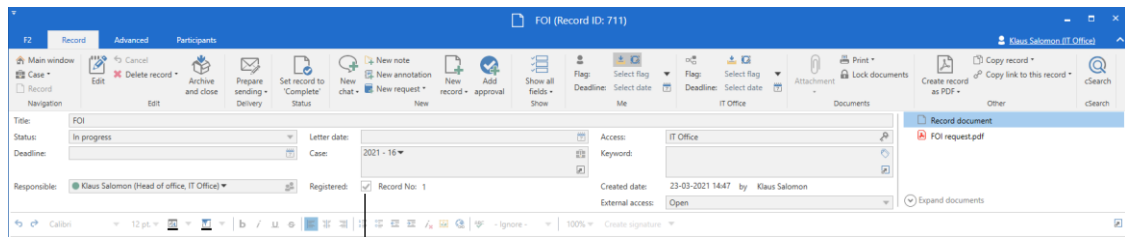
**Note:** If a PDF file is edited or contains extractions, the user must ensure that the PDF file is locked or otherwise protected so other users or external recipients cannot edit the FOI request report. This can be done in programmes such as Acrobat Reader Pro or LibreOffice.

# Managing record numbering in an FOI request

If an FOI request report has a gap in its sequential record numbering, the reason may be that a record has been deregistered 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" field has been ticked.



The "Registered" field and record no.

**Figure 17: Register a record**

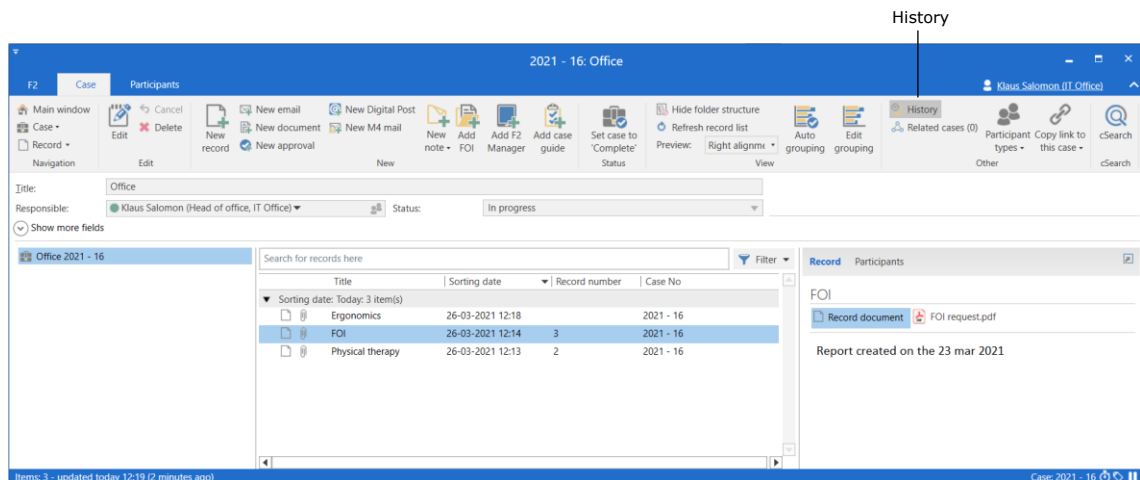
Records are assigned record numbers in the order they are registered. Once a record number is assigned to a record, the number cannot be reused. This means if a record is deregistered, its record number is no longer available.

If the record is re-registered, it is given a new record number – the next record number available and not its original record number.

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

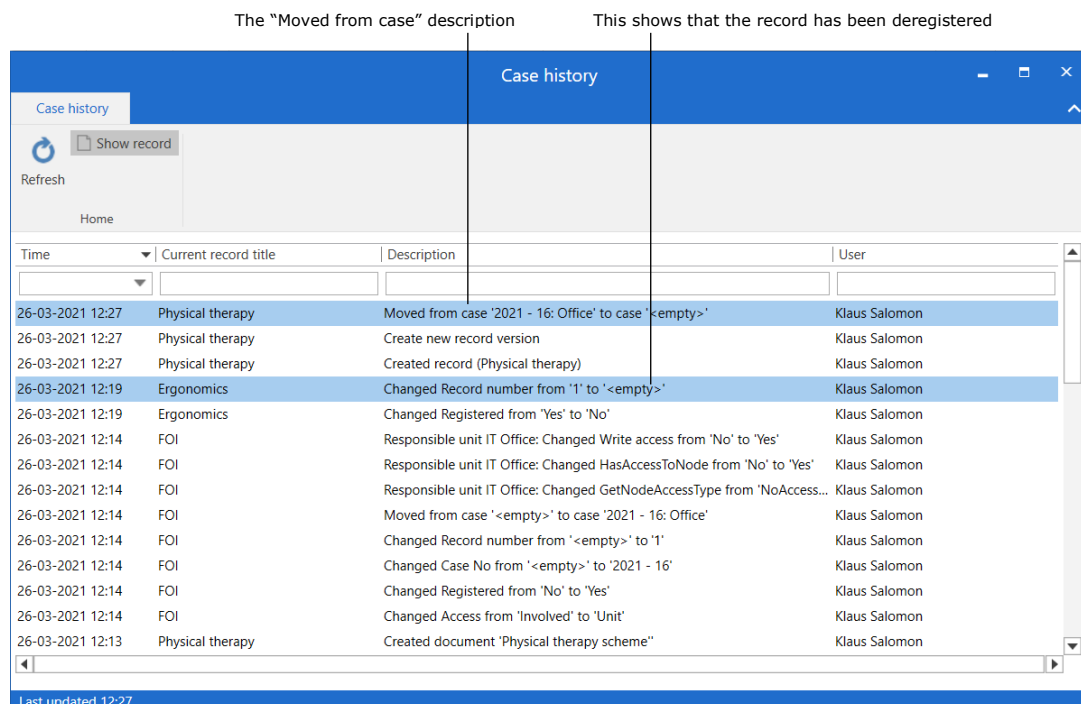
## Find a record that is deregistered and removed from case

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.



**Figure 18: Access the case history from the case window**

The "History" dialogue contains a log with all the 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.



**Figure 19: The "History" dialogue**

Once the record has been identified, it can be found in the "Archive" through a search on its title.



## **F2 FOI Request configuration options**

The configuration of F2 FOI Request 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 the "FOI" dialogue. This means that FOI request reports are generally generated using the same setup in the entire F2 installation. However, users can still adjust individual FOI request reports themselves if necessary.
- Add a filter that automatically removes unwanted content, such as records or files with certain titles, before the FOI request report is generated.
- Define what constitutes an empty record document in F2. An empty record document appears as an empty page when the FOI request report is generated. This can be avoided if the organisation defines the content of an empty record document. In that case, F2 automatically removes any empty pages from the FOI request report. This filter is invisible to individual users.
- Decide what text appears on the black bar at the top of each appendix when the FOI request report is generated.
- Define a standard layout for the FOI request report including a standard front page.

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