F2

Manager

Version 8

8.0.0.1560

Table of contents

Reading guide

This manual is written for users of F2 Manager.

The manual contains a short introduction to F2 Manager 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 Manager

The F2 Manager add-on module provides the user with access to cases, meeting materials, approvals (add-on module) on an iPad both online and offline. The module has been developed to support the transition to a fully digitalised working environment. F2 Manager helps facilitate and optimise work procedures by providing a mobile and more effective case handling procedure along with paperless meetings on a management level.

The F2 Manager user manual is divided into two parts. The first part concerns the administrative work in F2 Desktop by either the F2 Manager user or by their private office. The synchronisation settings for records, cases and meetings are set up in F2 Desktop. The first part also describes the setup and use of the gatekeeper function in connection with synchronising approvals (add-on module).

The second part of the user manual concerns the iPad application. The iPad app grants access to synchronised material on the go as well as the use of bookmarks and annotations.

F2 Manager allows an organisation to share documents through iPads which makes material available for managers and employees on the go without compromising security, flexibility, and stability.

Note: It is possible to restrict a user’s access so they can only log in via F2 Manager. This means that the user is excluded from using F2 Desktop or F2 Touch. This configuration is performed in cooperation with cBrain.

Using F2 Desktop for administration

The cases, records and documents to be transferred to the F2 Manager app are selected in F2 Desktop. This is typically done in connection with a meeting as the F2 Manager app is especially helpful when organising meeting materials. Meetings and synchronisation procedures are described in the section *Synchronise records and cases.*

In F2 Desktop flags can be set up that let a private office manage the synchronisation of approvals (add-on module) to the app. The setup and use of flags for synchronisation is described in the section *Synchronise using the gatekeeper function.*

Working in the F2 Manager app

The F2 Manager app has four sections:

- The meeting planner, which provides an overview of meetings and associated materials.
- Approvals, where approvals are managed and processed.
- Bookmarks, which keep track of records and documents that have been bookmarked.

- Notifications, which provide an overview of new materials and the synchronisation status for the app.

F2 Manager uses the language selected in the iPad language settings. F2 Manager supports Danish, English, and German.

Working in F2 Manager is described in the section *The F2 Manager app*.

Using F2 Desktop for administration

The following sections describe how to administrate F2 Manager using F2 Desktop. The section *Synchronise records and cases* describes how to give access to cases and records in F2 Manager. For F2 users with a private office, the gatekeeper function in F2 Manager can be used to control which approvals are sent to the user's iPad. Read more about the this in the section *Synchronise using the gatekeeper function.* Users without the gatekeeper function can still synchronise approvals (add-on module) to F2 Manager. The last section, *F2 Manager app,* describes how to set up F2 Manager on an iPad*.*

Synchronise records and cases

All F2 cases can be made accessible in F2 Manager. F2 Manager is designed to provide access to materials in connection with meetings. This is why the synchronisation of records and cases to F2 Manager is done through meetings. Once a case is added to F2 Manager, it is automatically attached to an ad hoc meeting. Ad hoc meetings can be created and viewed in F2 Touch. For more information about this procedure, see *F2 Touch – User manual*.

To add a case to F2 Manager click on the **Add F2 Manager** menu item in the case window as shown below.

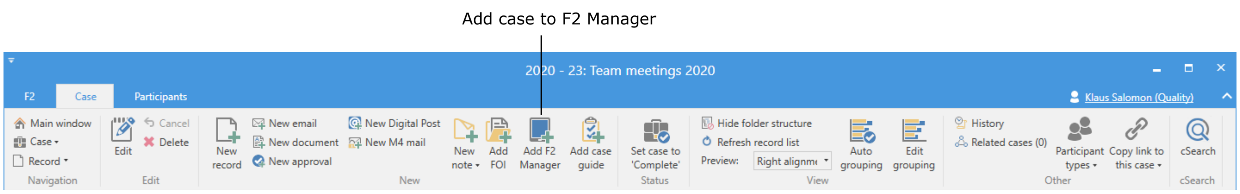


Figure 1: Add case to F2 Manager

An F2 Manager tab is then added to the case. The "F2 Manager" tab is found furthest to the right, next to the "Participants" tab in the case window. The figure below shows the F2 Manager tab and its sections. The format of the sections resembles a meeting where the case and its associated records and documents are available to users during a selected time period. User are added as either meeting participants or stakeholders.

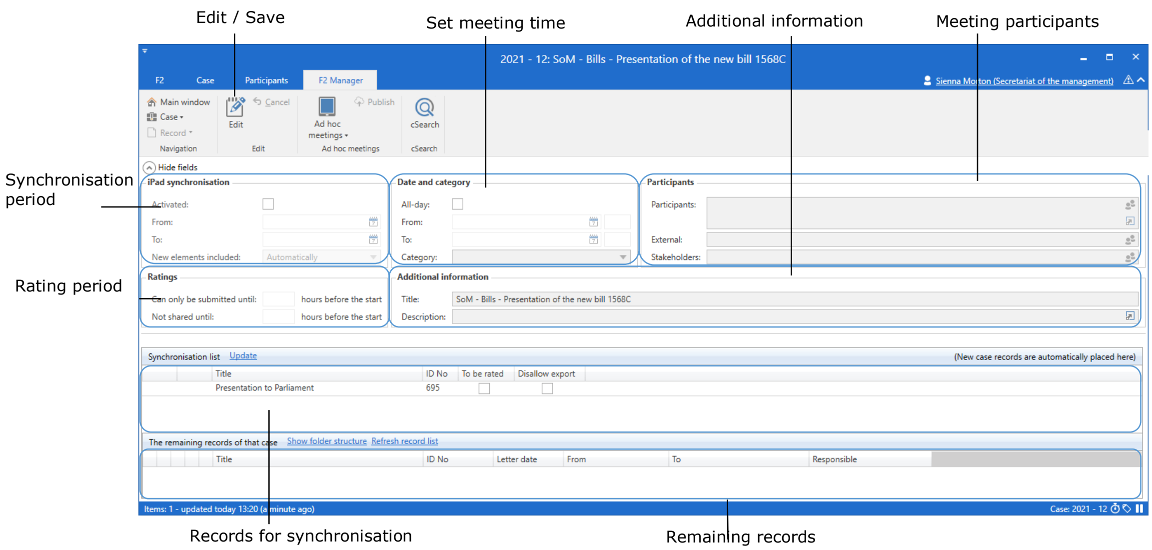


Figure 2: The "F2 Manager" tab in the case window

Click on **Edit** in the ribbon to set up the synchronisation of a meeting to F2 Manager. The upper part of the tab contains metadata fields that are related to the iPad synchronisation to F2 Manager. The lower part of the tab is dedicated to managing the availability of records and documents. The different tab sections are described in the following sections.

iPad synchronisation

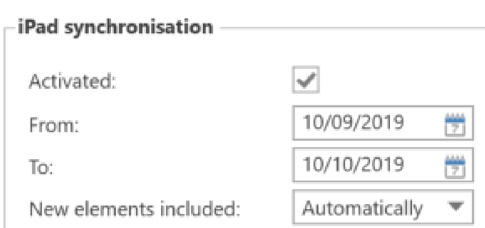


Figure 3: Synchronise to iPad

Tick the "Activated" box to synchronise the records on the F2 Manager synchronisation list. The records are only synchronised within the specified time period and to the added participants.

Data is not synchronised to the iPad outside the specified time period.

The "New elements included" field is described below in the *Automatic vs manual inclusion* section.

Note: Ticking the "Activated" box automatically fills in the other sections' date and time fields with pertinent standard values unless they already contain data. This is useful if the user wants a meeting time of "Now" with a standard synchronisation time period.

Date and category

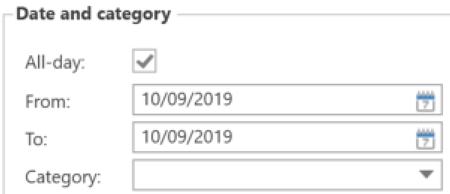


Figure 4: Date and category

The "Date and category" fields are used to specify a meeting date and time. Ad hoc meetings are shown on the specified meeting date and time in the calendar view in F2 Manager's meeting planner.

If the meeting lasts longer than a day, tick the "All-day" box. Meetings marked as "All-day" meetings are indicated as such in the F2 Manager app's calendar view. A start and finish time can be specified for the meeting.

A category can also be specified. This is an optional field used for categorising the meeting. Categories are created by users with the "Value list administrator" privilege. For example, a category named "Administration" can be created for an installation to indicate meetings concerning this topic.

Ratings

Individual agenda items can be marked for assessment. This means that every user can rate agenda items and add a comment from their iPad.

Unless restrictions are added, ratings are shared between all F2 Manager users with access to the meeting. For the meeting itself the ratings can be restricted in regard to sharing and presentation.

Figure 5: Ratings

Agenda items are marked for assessment by checking the "To be rated" box next to the item on the synchronisation list. Read more about this in the section *Select items for synchronisation*.

Can only be submitted until

"Can only be submitted until: [x] hours before start" is an optional field. It limits the time period in which a rating can be given. It is possible to hide ratings a chosen number of hours before the meeting.

Leave this field empty to make rating possible at any time.

Not shared until

"Not shared until: [x] hours before start" is an optional field. It limits when ratings can be shared. It is possible to block the sharing of ratings until a chosen number of hours before the meeting.

Leave this field empty to share ratings immediately.

Participants

Figure 6: Participants

Meeting participants and stakeholders, both internal and external, are specified in the fields of the “Participants” category. Only participants that exist in F2’s participant register can be added.

> **Note**: F2 can be configured so that ministers and heads of department can only be added to meetings by users who can act on behalf of them. The configuration is performed in cooperation with cBrain.

Participants

The “Participants” field is used to specify meeting participants. Meeting participants receive:

- The option to rate agenda items, if a rating is wanted.
- Read access to the records on the agenda.

Stakeholders

The “Stakeholders” field is optional and used to expand the group of F2 Manager users whose iPads are synchronised with the meeting. Stakeholders have the same rights as normal meeting participants except that they cannot rate agenda items.

Additional information

Figure 7: Additional information

When an ad hoc meeting is created it inherits the case title by default. The meeting can be renamed in the “Title” field.

The “Description” field in the “Additional information” category is an optional field used for adding information about the meeting, such as the meeting location or a specific meeting room.

The synchronisation list and the remaining records of the case

The elements on the synchronisation list are the records that will be visible on with the iPad after the synchronisation process.

As the name "The remaining records of that case" indicates, this field consists of records that have been deselected for synchronisation either manually or automatically. Once a case is synchronised to F2 Manager, its records are automatically added to the synchronisation list.

Automatic vs manual inclusion

If new records are added to a case, they will synchronise with the iPad depending on the "New elements included" field. This field is found in the "iPad synchronisation" category and is set to either **Automatically** or **Manually** using a drop-down menu.

- **Automatically** means that all records on a case are added to the synchronisation list except for ones the user manually drags to the "The remaining records of that case" field.
- **Manually** means that none of the records on the case are synchronised except for ones the user drags to the synchronisation list and the records already on it.

Use automatic inclusion to automatically synchronise new records with the iPad as they are added to the case.

Use manual inclusion to manually select the agenda items to synchronise with the iPad and avoid synchronising new records on the case along with already synchronised records.

> **Note**: It is only possible to synchronise records automatically if the user has access to all the case records. If not, manual synchronisation must be used.

A standard value (Automatically/Manually) can be configured to apply for all users. This configuration is performed in cooperation with cBrain.

Select items for synchronisation

Records on the synchronisation list are synchronised with the iPad when the synchronisation is activated.

Drag records between the synchronisation list and the list "The remaining records of that case" to determine the records for synchronisation.

Be sure to pay special attention to the "New elements included" function as it determines if the records are automatically synchronised or not. The field is further described in the section *Automatic vs manual inclusion*.

Two additional functions are available for each agenda item in the synchronisation list. Firstly, it is possible to mark an item as up for assessment. Secondly, export of the agenda item can be disabled.

Mark an agenda item for assessment by checking the item's box in the "To be rated" column. Ratings are further described in the *Ratings* section.

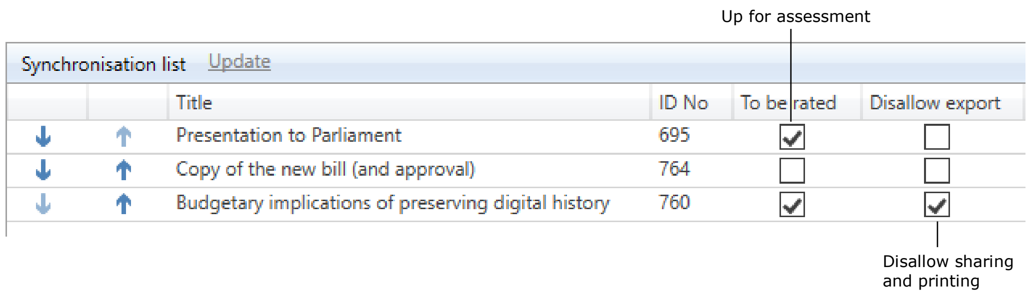


Figure 8: The synchronisation list

Check the "Disallow export" column to disable all sharing options in the F2 Manager app. This means that the agenda item and its associated documents <u>cannot</u> be printed or shared with other apps on the iPad.

Structuring the agenda items (records)

The figure below shows the F2 Manager tab in editing mode. The records used as agenda items can be ordered on the synchronisation list using the blue arrow icons to the left of the record titles. Update the agenda by clicking **Save** in the ribbon.

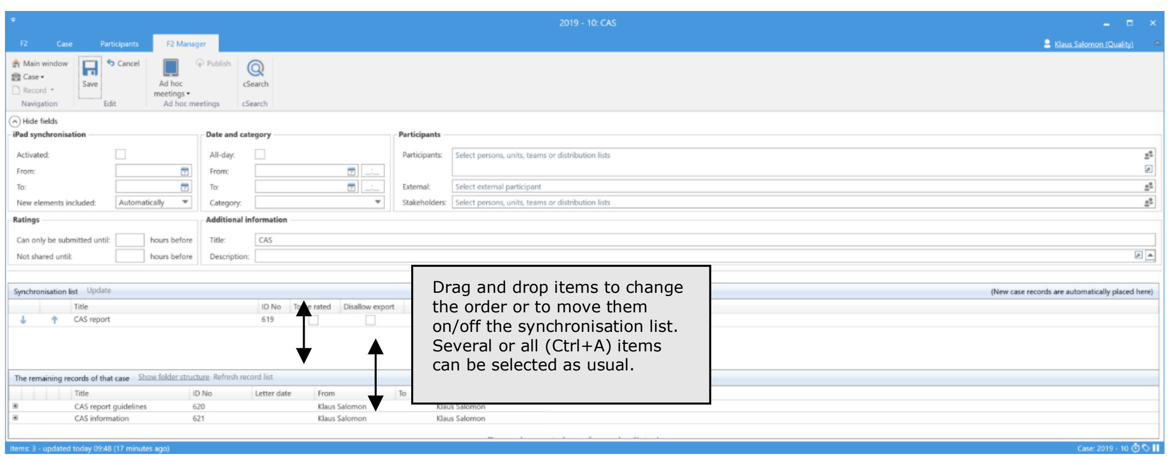


Figure 9: The F2 Manager tab in editing mode

Create multiple ad hoc meetings for the same case

There may be several reasons for a user to create multiple meetings for the same case. For example, if a meeting participant does not have access to all the relevant records.

Click on **New ad hoc meeting** in the drop-down menu of the "Ad hoc meetings" menu item to create a new ad hoc meeting for the same case. See the figure below. From here, it is also possible to choose between existing ad hoc meetings on the same case.

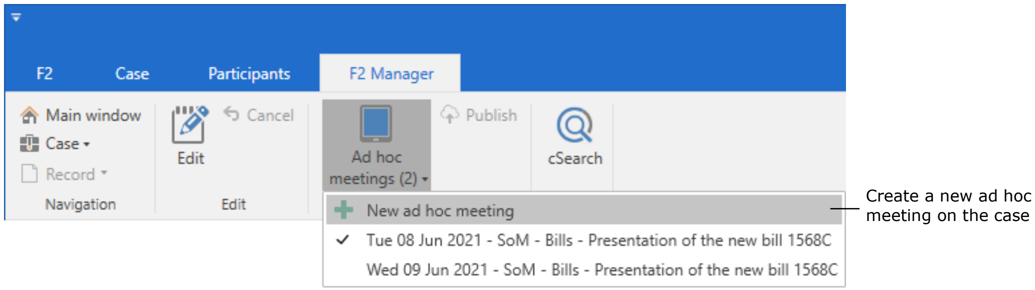


Figure 10: Create and select other ad hoc meetings

Click on **New ad hoc meeting** to open a new F2 Manager tab from which to access the case records.

Synchronise using the gatekeeper function

A private office can use F2's gatekeeper function to manage which approvals are sent to the minister's or head of department's iPad. This requires both the F2 Manager and F2 Approvals add-on modules. The gatekeeper function increases work effectiveness when dealing with a large number of approvals. It lets a private office or a similar instance decide, prioritise, and quality assure the material to be viewed by the minister.

A minister or head of department with an active gatekeeper function does not receive approvals directly to their F2 Manager app. First the private office receives the material, which is then made available on the minister's iPad. The gate works both ways, which means the minister sends back an approval to the private office before it is returned to the responsible user.

The gatekeeper function for approvals can be used by all users and with any role. The function is not limited to a specific role type. However, this means that all users with this specific role can use the gatekeeper function. The private office must be in the same unit as the supported user. Additional roles can be created in cooperation with cBrain.

The iPad synchronisation is managed through unit flags. The following tasks must be performed before the gatekeeper function can be used:

- A user with the "Value list administrator" privilege must create flags using the "Value list administration" function.
- A user with the "On-behalf-of administrator" privilege must assign the private office the rights to manage approvals on behalf of the minister or head of department.

For more information regarding value list administration and setting up on behalf of rights, see the *F2 Desktop – Administrator* manual.

The gatekeeper function is configured in cooperation with cBrain.

Create flags for managing

Click the **Value list administration** menu item in the ribbon of the "Administrator" tab. In the "Value list administration" dialogue, select **Flag** in the drop-down menu for types. Right-click on the **Flag** value list and select **Create** to create a new flag.

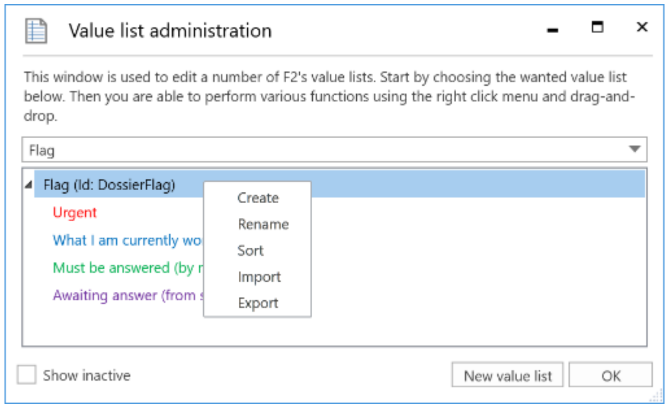


Figure 11: Create flag

Once the flag is created, the "Create value list element" dialogue opens. Enter the name, description, external ID, and colour of the flag.

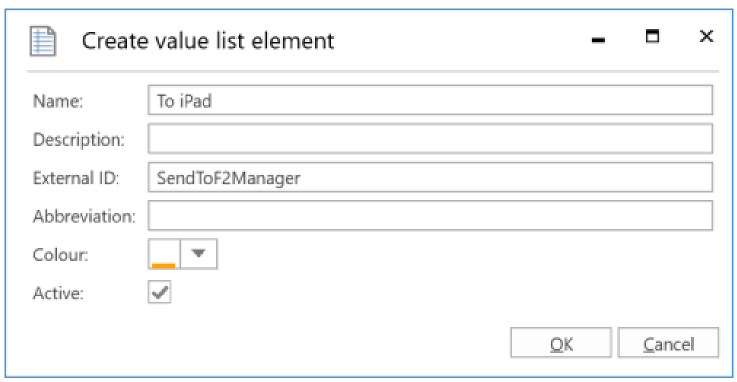


Figure 12: Properties for a flag

Note: The external ID must match one of the external IDs described in the table below in order for the synchronisation to work. The external ID can only be configured in the "Value list administration" dialogue.

As a minimum the following four flags must be created in order to use the gatekeeper function:

Name	Description	External ID	Colour
To iPad	When this flag is selected, the approval is moved to the minister's iPad.	SendToF2Manager	Choose freely (green is default)
To iPad (urgent)	When this flag is selected, the approval is moved to the minister's iPad with an urgent indication. The indication is present even if the approval's "Urgent" box is unticked.	SendToF2ManagerAsImportant	Choose freely (dark red is default)
From iPad	This flag is automatically assigned to an approval that has been processed by the minister in F2 Manager.	HandledOnF2Manager	Choose freely (purple is default)
From iPad - sync problem	This flag is automatically assigned to an approval to indicate a synchronisation problem with F2 Manager.	SyncProblemOnF2Manager	Choose freely (blue is default)

As many flags as needed can be created for the private office. cBrain can create more flags for prioritising approvals. For example, a minister might want a third category in F2 Manager called "Prioritised". When configuring a flag, it is possible to select which colour the approval with the new flag will have on the iPad as well as the sorting sequence of the flags.

On behalf of rights

A private office must have on behalf of rights in order to manage approvals and records and send these to the minister's or head of department's iPad.

The secretary's on-behalf-of rights must specifically be "Can handle approvals". These rights are assigned by a user with the "On-behalf-of administrator" privilege. Read more about assigning "on behalf of" privileges in the *F2 Desktop – Administrator* manual.

Synchronising approvals

The following sections describe the necessary actions in F2 Desktop that allows for managing approvals in F2 Manager.

Approvals can either be managed by a private office or directly by the F2 Manager user. For further information on the gatekeeper function, see *Synchronise using the gatekeeper function.*

Managing approvals without the gatekeeper function

If a user manages approvals themself, the approvals will appear directly on the user's iPad as soon as the approval reaches the step the user is involved on. The user can approve or return the approval. Depending on the user's choice the approval is then sent on to the next step or returned to a previous step. Managing approvals in F2 Manager is described in the *Approvals* section.

Managing approvals with the gatekeeper function

If an F2 Manager user is supported via the gatekeeper function, approvals are first received by the private office. The office receives the approval in their inbox and, if it is to be sent to the iPad, assigns the appropriate unit flag. The two flags, "To iPad" and "To iPad (urgent)", are used to send an approval on to the minister.

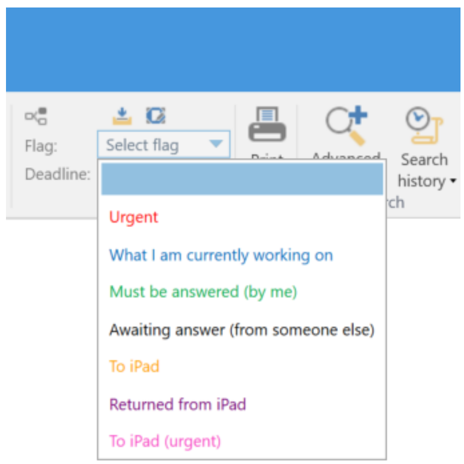


Figure 13: Unit flags

The private office can easily create an overview of the minister's approvals by performing a unit search with the search criteria "approvals where the minister or head of department is the current step", by setting up flags, and by assigning "on behalf of" rights as previously described.

When the approval reaches the minister or head of department, they can choose to either return or approve the approval. Through a configuration, it is possible to choose a third option, "conditionally approved". F2 is configured in cooperation with cBrain.

Once the minister or head of department has processed the approval, it is not automatically forwarded to the next step of the approval process, but instead sent to the private office. This is done by assigning the "Return from iPad" flag to the approval. It then appears in the unit inbox and can be processed further.

The approval log for users supported by the gatekeeper function

For F2 Manager users supported by the gatekeeper function, the approval log shows whether an approver has processed a given approval, but any comments do not appear.

This function can be practical when a minister either approves or returns an approval from F2 Manager. The approval then appears in the private office user's F2 Desktop.

In the example to the right, private secretary Myles McDougall has opened an approval which was approved in F2 Manager by minister Maisy Moore.

The minister's comment does not appear directly in the log. Instead it is indicated by the text: "Maisy Moore is processing, sending remark".

Other users with access to the approval will also see this text and not the comment itself.

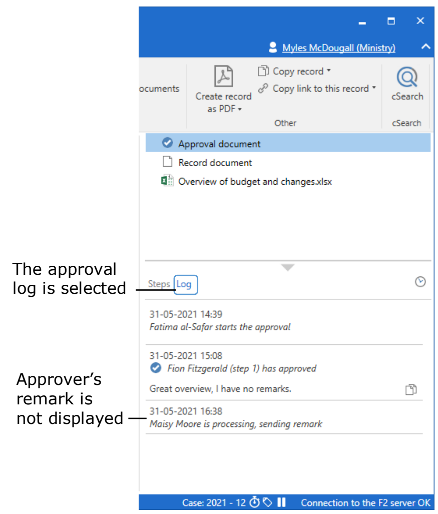


Figure 14: Approval log

Secretary Myles McDougall can view the minister's comment by clicking **Steps** on the approval as shown to the right.

The comment is only displayed in the log when Myles clicks **Return and resume after me**.

It is possible to configure the detail level of the returned comment and include the approver's recommendation for restarting returned approvals. F2 is configured in cooperation with cBrain.

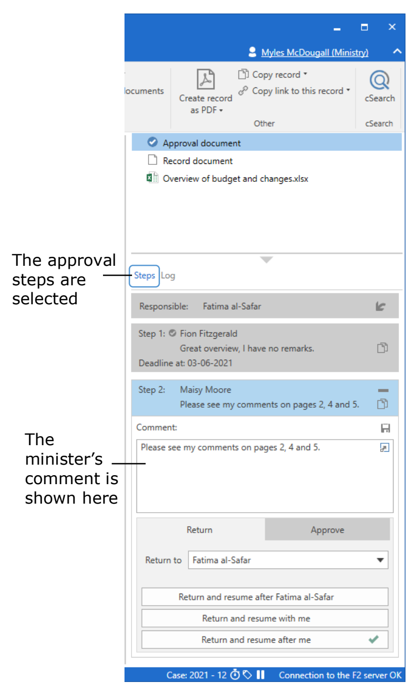


Figure 15: Approval steps

Additionally, approval actions taken on F2 Manager can be completely excluded from the approval action log. This means that no details, such as user, time, action type, or comment, are shown in the log of the relevant record. F2 is configured in cooperation with cBrain.

F2 Manager app setup

The F2 Manager app can be downloaded on Apple's App Store on the iPad. There are two ways to set up access to the app: through **Settings** on the iPad or through the iPad's web browser.

Setup through Settings

Once the app is downloaded, tap on **Settings** on the iPad and then on **F2 Manager** as shown below.

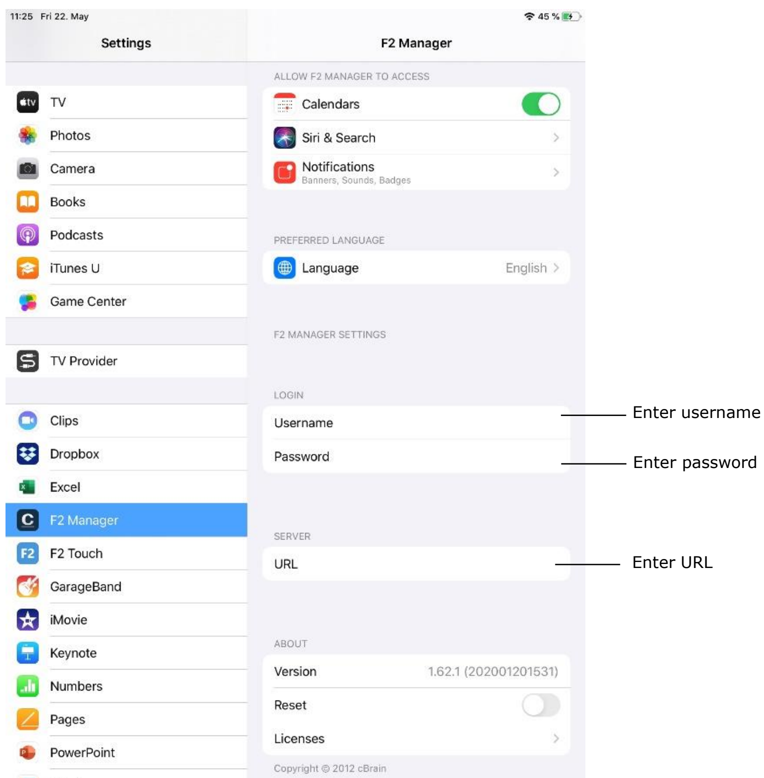


Figure 16: Set up F2 Manager through "Settings"

Once the fields have been filled in, click on **F2 Manager** to open the app. See the figure below.

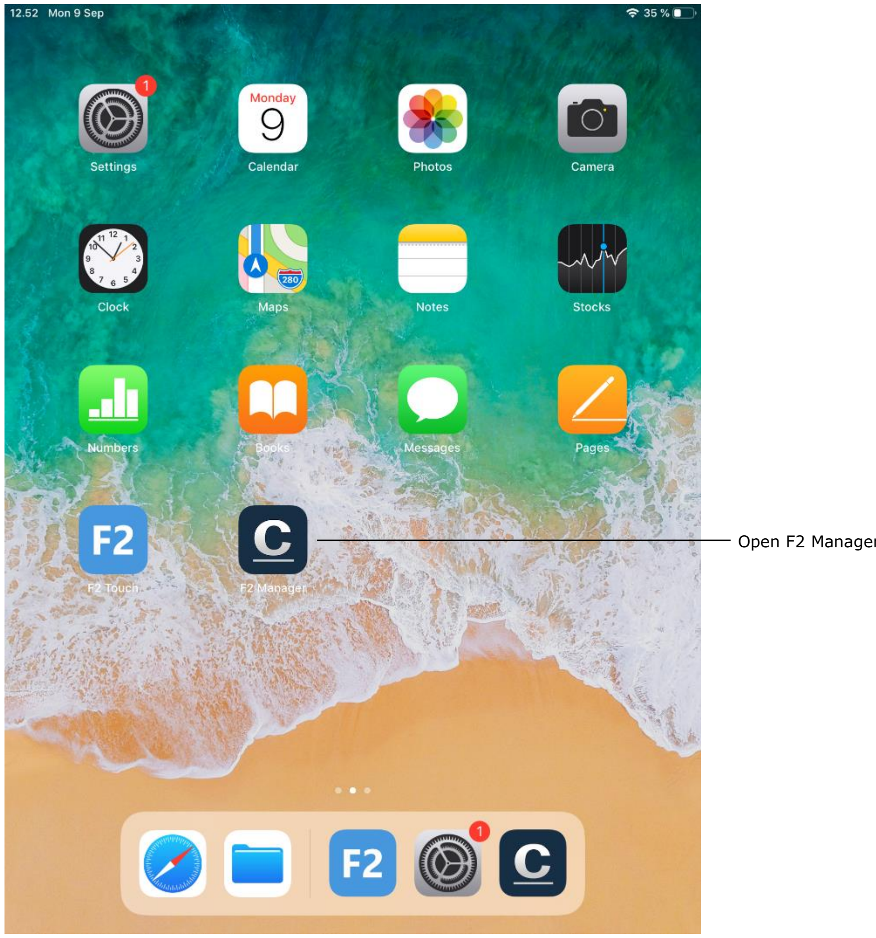


Figure 17: Open F2 Manager

Setup through a web browser

Enter the provided URL in the web browser's address line to set up the app using the iPad's browser. A website opens from which the setup must be done. See the figure below.

Enter username and password and tap **Set up** to save. F2 Manager is then automatically set up with the entered information.

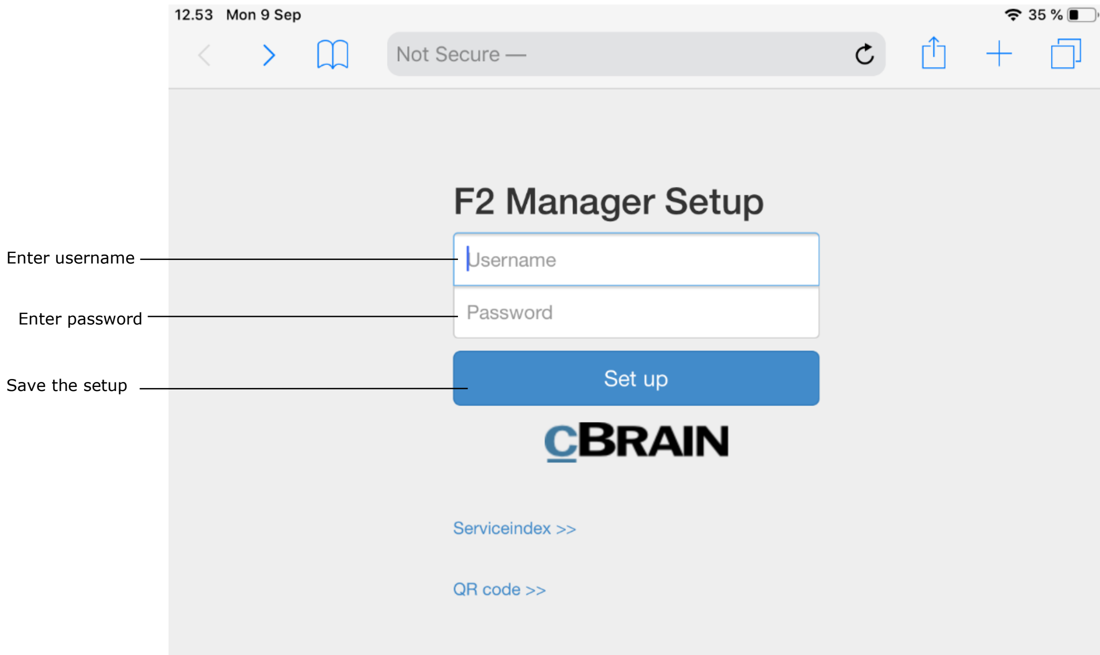


Figure 18: Set up F2 Manager using a web browser

After completing the setup, the app opens and the fields described in the previous section are automatically filled in by the iPad.

Resetting the app

It is possible to perform a local reset of F2 Manager. Resetting the app means that local data regarding e.g. records and approvals are deleted and content is reloaded. A reset does not affect the user setup, only the user's app contents.

To reset the F2 Manager app, go to the iPad's **Settings** and select **F2 Manager**. At the bottom of the F2 Manager settings, tap the **Reset** button.

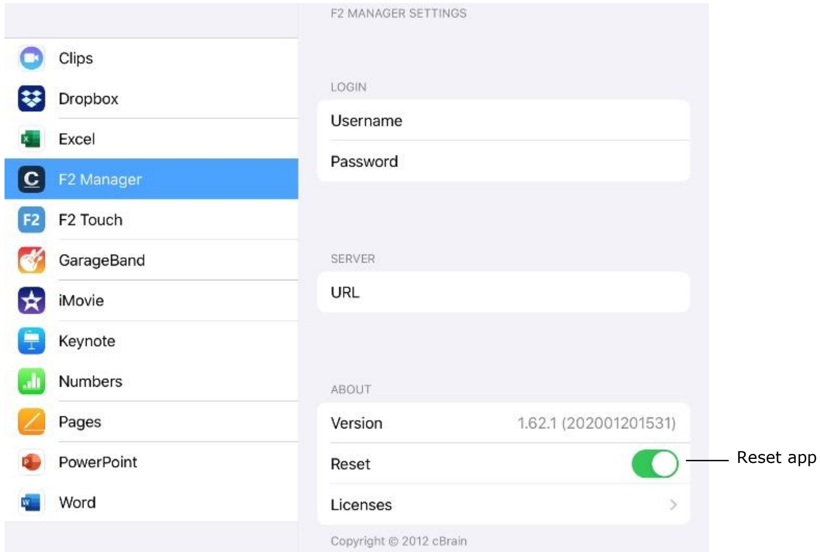


Figure 19: The Reset button in "Settings"

When F2 Manager is reopened, the local data will be reset. This primarily affects work performed while the iPad was not connected to the Internet. Without an Internet connection the work in the app is not synchronised, but only saved locally. If the app is reset before the Internet connection is reestablished, any work that is only saved locally is lost.

The F2 Manager app

The following sections describe how to use the F2 Manager app for meetings and case management. The app consists of four basic functions that are each described in the corresponding sections:

- *The meeting planner*
- *Approvals*
- *Bookmarks*
- *Notifications.*

Several of the functions enable document editing. This is described in the section *Working with documents*.

The F2 Manager app contains a quick guide describing the app's functions. To open the quick guide, tap on **Notifications** , select **Settings** and then **Show guide** in F2 Manager.

The meeting planner

The meeting planner contains the cases, records, and documents transferred to the app in connection with meetings, projects, cases, etc. The materials are available during the time period in which they are relevant for a specific meeting or case, and they are sorted chronologically after the meeting schedule.

Using the meeting planner, the materials can be reviewed and processed, e.g. by adding annotations and notes. Everything is continuously synchronised with F2 Desktop, so the risk of losing any work is minimal.

Meeting overview

The front page of the meeting planner provides an overview of meetings and their associated documents. The documents are organised in a calendar and list view. Meetings and associated documents can be opened from both views.

The calendar view

The meeting planner's calendar view shows:

- Planned meetings for the selected day in the calendar
- Appointments from the user's other calendars. Tap the calendar selection button to view the appointments. The availability of this function depends on the iPad's configuration.

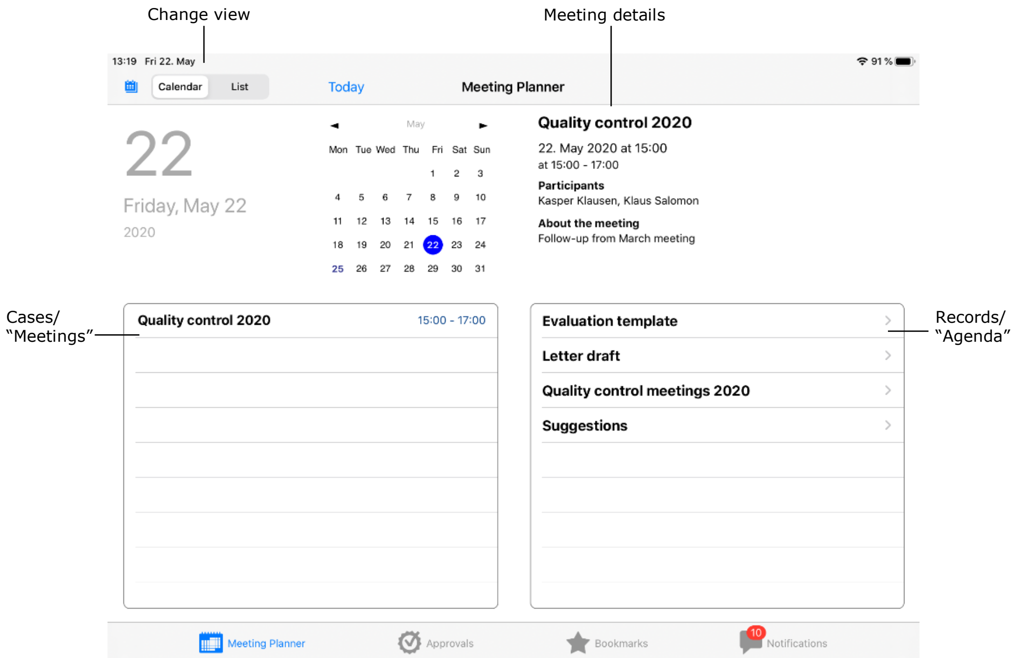


Figure 20: The meeting planner’s calendar view

The list view

The meeting planner’s list view shows all meetings. The list can be filtered by the following parameters:

- **Title**:

  Search for agenda items, meeting title or appendix title.

- **Meeting type**:

  Select one or more meeting types.

- **Period**:

  Specify a time period to view in the list of meetings.

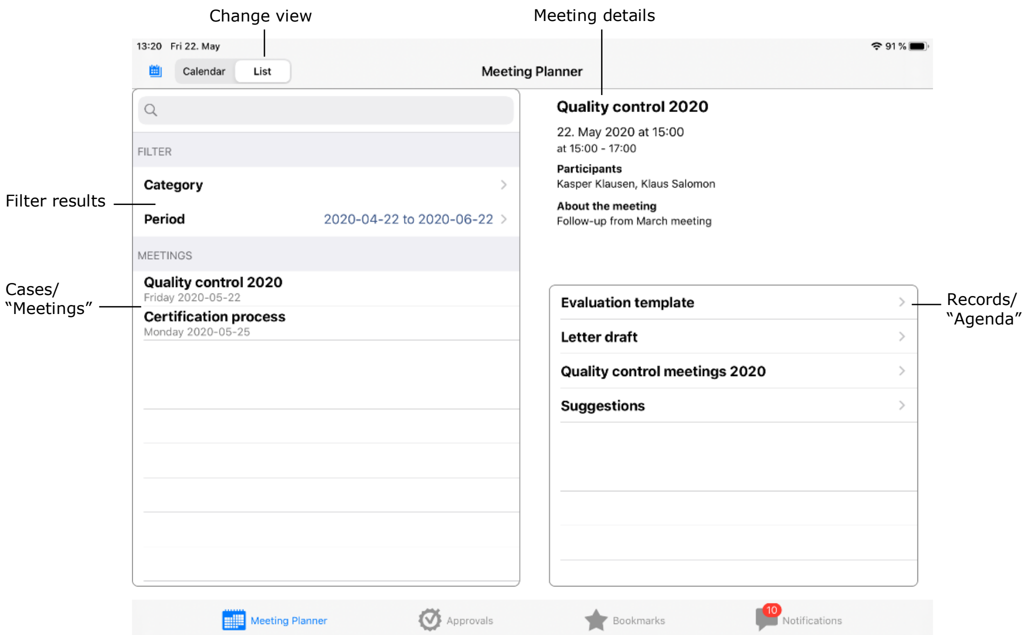


Figure 21: The meeting planner's list view

Meetings and the meeting view

F2 operates with two different types of meetings: ad hoc meetings, and meetings that are created using the F2 Meetings add-on module. Both types appear in F2 Manager in the same view.

An ad hoc meeting is transferred to F2 Manager when a case is synchronised to the iPad from F2 Desktop.

A meeting organised with the F2 Meetings add-on module is created in F2 Desktop. Contrary to ad hoc meetings, which are automatically transferred when a case is synchronised to F2 Manager, F2 Meetings is used to create and organise meetings in F2 Desktop independent of F2 Manager.

While the two meeting types have a number of differences, they are also similar in several ways. Read more about ad hoc meetings in the section *Synchronise records and cases*.

The meeting view

The meeting planner's meeting view shows:

- **Agenda (records):**

  Shows the agenda items for the selected meeting.

- **List of appendices:**

  Shows the list of appendices related to the selected agenda item.

- **Chats related to the selected agenda item:**

  Shows existing chats and allows new chats to be added to the selected agenda item.

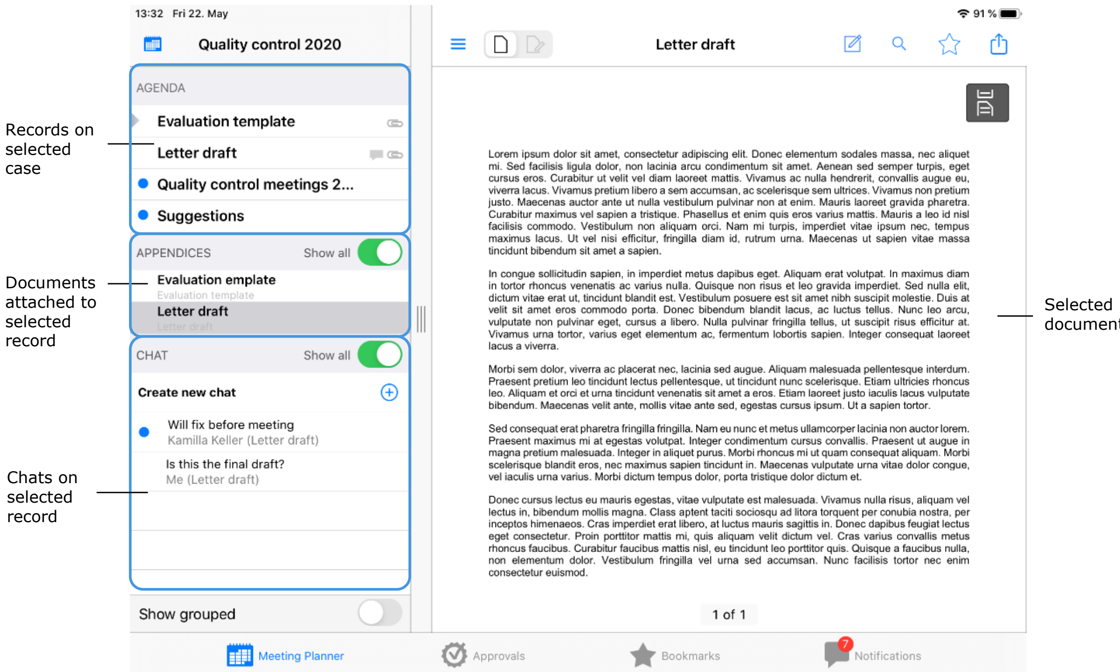


Figure 22: The meeting planner's meeting view

On the agenda for meetings organised using F2 Meetings, a padlock icon is displayed next to each agenda item. This padlock is either open or locked .

- If the padlock is open, the agenda item and its appendices are not final and can still be edited.
- If the padlock is locked, the agenda item and its appendices are final and cannot be changed.

For these meetings, a snowflake may be displayed next to the agenda items. This indicates that the appendix has been copied into the case and has been "frozen" on to the meeting.

It is possible to annotate the record document and appendix for each agenda item. The possibilities and procedures are described in the *Working with documents* section.

Access to annotated documents in F2 Desktop

When annotations are made in F2 Manager's meeting planner, the annotated documents are located on the F2 server just like all other data. This means that annotated documents can be accessed from both the user's iPad and from F2 Desktop. However, it should be noted that annotations are only saved and transferred to F2 Desktop after tapping **OK** in annotation mode.

F2 automatically collects all annotated documents on one case entitled "F2 Manager archive for [Username]". This is done regardless of the documents' original case attachment. This case contains all the records with documents annotated by the user in PDF format. F2 creates a record for every record on the case that has an annotated document. If one of the original records has several annotated documents attached, they are all saved on the same record as shown in the figure below.

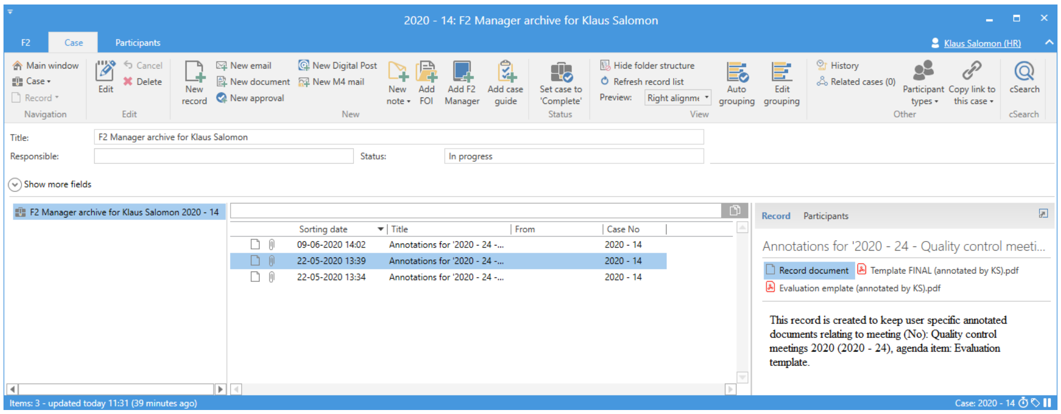
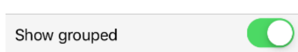


Figure 23: Annotated documents on the same record

Note: By default, only the user who made the annotations can access the "F2 Manager archive for [Username]" case and its annotated documents, because their access level is automatically set to "Involved". The annotations are thereby kept private and cannot be found by others. As with other records in F2 it is still possible to share the records with other users, e.g. by changing the access level or by chatting the record to another user.

Note: Users with limited access can annotate documents in F2 Manager's meeting planner. Users with limited access are created by an administrator with the "User administrator" privilege and requires the F2 Limited Access add-on module. Read more in *F2 Desktop – Administrator*.

Show grouped

Tap **Show grouped** 

in the meeting planner's meeting view to change the view mode. This will organise all related elements into groups based on the agenda items.

Agenda items are bolded while associated attachments appear in a smaller, non-bolded font.

Tap the blue icon  to add a chat to an agenda item.

Chats are italicised and located below any attachments.

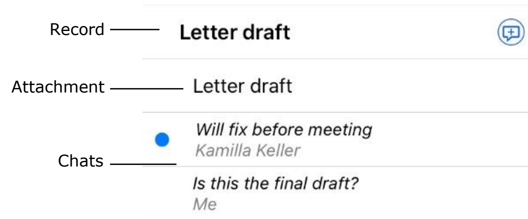


Figure 24: Show grouped in the meeting view

Ratings in F2 Manager

The user responsible for the meeting can set it up so that participants can rate the agenda items in F2 Manager as long as they have access to the records. Depending on the meeting's setup, the ratings may be visible to the meeting participants. For more information, see the *Synchronise records and cases* section.

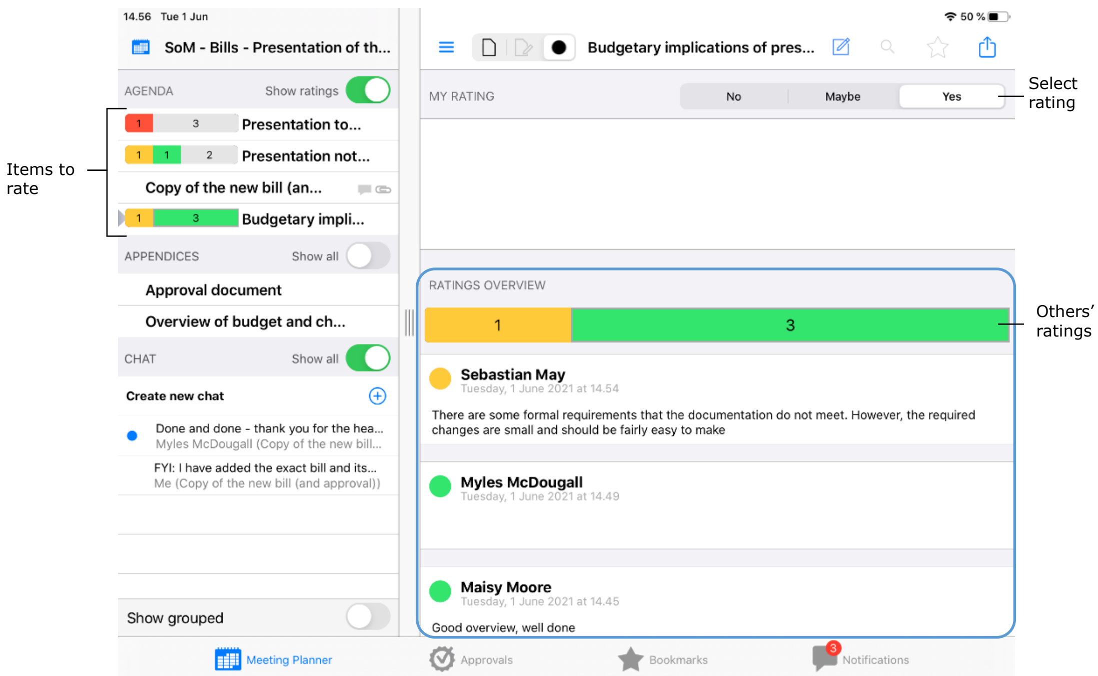


Figure 25: Rating a specific agenda item in the meeting planner's meeting view

Approvals

Active approvals can be processed in F2 Manager if the F2 Approvals add-on module is installed. The F2 Approvals module is described in the *F2 Approvals – User manual.*

Tap **Approvals** on the ribbon at the bottom of F2 Manager to view a list of any transferred approvals. If the gatekeeper function is active, the private office decides which approvals are transferred to F2 Manager. This means that there may be approvals that are not transferred to F2 Manager even though the user is the current step's approver. The reason may be that the private office has decided not to transfer them. For more information about this, see the section *Managing approvals with the gatekeeper function.*

An approval appears in a user's list for one of three reasons:

- The user has been set as an approver on one of the approval's steps. These approvals appear at the top of the list. See the figure below.
- The user has been set as a copy recipient on the approval. This means the approval is only for orientation or comments. The approval's title is toned down in the approval list.
- The user has received a chat on a record that contains an approval. The approval is then solely intended for orientation. The approval's title is therefore also toned down in the approval list.

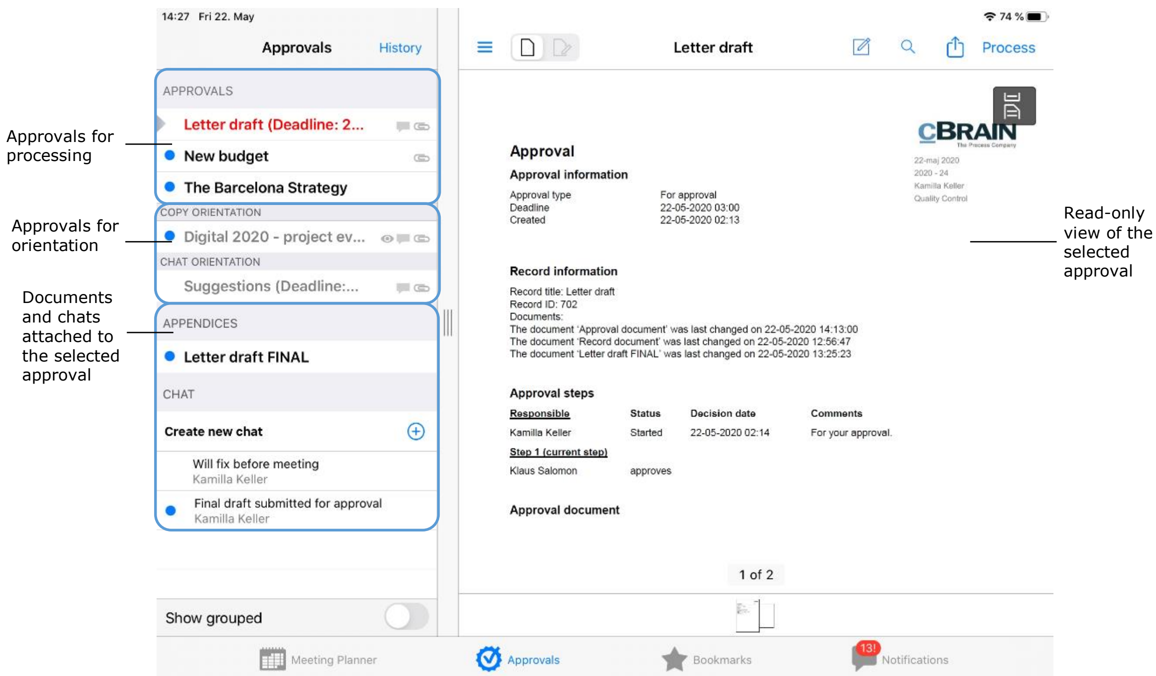


Figure 26: The approval view

Records with approvals are sorted after the following criteria:

- For approval with me/For my orientation
- Urgent/normal
- Deadline.

For example, this means that approvals in which the user is involved and that are urgent with a forthcoming deadline will always appear at the top of the approval list.

The approval's title is formatted depending on the approval's status as described in the table below.

Format	Example	Meaning	
Normal	**Approval by steering committee (Deadline: [deadline])**	For approval	The approval is to be processed by me.
Red	**Urgent – Approval by user (Deadline: [deadline])**		The approval is to be processed by me and is marked as "Urgent".
Italics	*Approval regarding the hearing*	For orientation	The approval has already been processed by me, but has not yet been sent to a server – typically because the iPad is offline.
Grey	**Regarding the expansion of admin…**		The approval is only visible to me because I: • am involved in a chat on the record. • have been set as a copy recipient on the approval. In both cases, I cannot process the approval.
Faded red	**Request for cases regarding (deadline)**		The approval is only visible to me because I am either involved in a chat on the approval or I have been set as a copy recipient on an approval that is marked as "Urgent" in my unit. I cannot process the approval.

Processing approvals

Approvals can be processed directly from F2 Manager. The approval's documents, including appendices, can be read, commented and annotated if necessary. How to comment and annotate is described in the *Working with documents* section.

Note: When opening an approval, the record and approval documents are shown as one combined document. This view can be configured so they appear as two separate documents. The configuration is performed in cooperation with cBrain.

The annotated document is saved as a PDF and attached to the approval record so other approvers can easily access the user's feedback.

The figure below shows how an approval is further processed in F2 Manager. If the user is set as approver, they can approve or return the approval, with a comment if necessary. Tap **Process** in the menu bar and either approve or return the approval.

Read more about processing approvals in *F2 Approvals – User manual*.

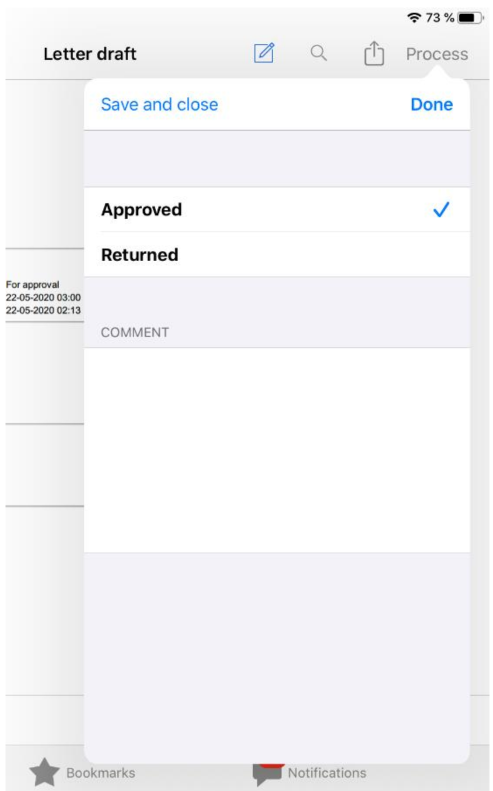


Figure 27: Processing approvals

Bypass the private office under special circumstances

Certain circumstances may require getting an approval processed outside normal working hours. In such cases, tap **Send directly** in F2 Manager. This function is available through a configuration made in cooperation with cBrain.

The **Send directly** button is only visible and active when an approval needs processing and the next approver has a private office to do this. This means that if a user selects **Send directly** when processing an approval, the approval is sent directly to the next approver without first being sent to the private office. The private office is automatically informed about this in a note. It is not only the head of department who can use the **Send directly** function, but all users on the approval step before a user with the gatekeeper function enabled.

A user with a private office and the gatekeeper function enabled cannot **Send directly**. For example, if both the minister and the head of department have the gatekeeper function enabled, then the head of department cannot send an approval directly to the minister.

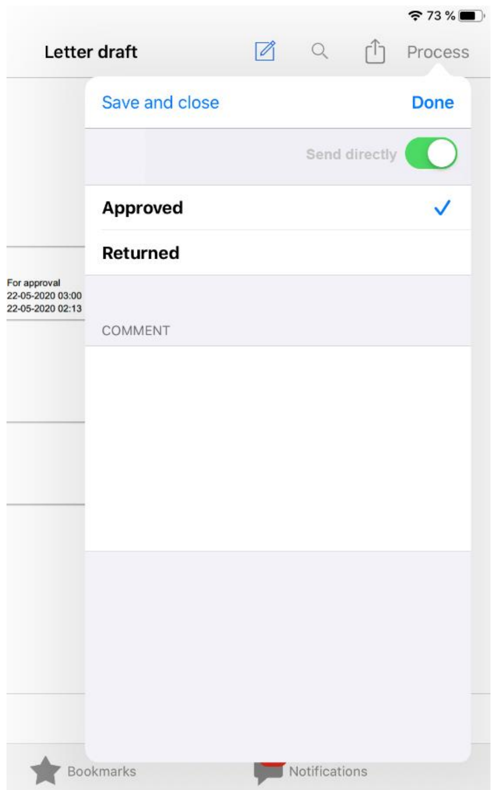


Figure 28: The approval processing option "Send directly"

As a copy recipient on an approval (copy orientation)

If a user is set as a copy recipient on an approval on a record, the user can mark the approval as "Seen" and add a comment in F2 Manager when the approval appears on their approval list.

This procedure basically works in the same way as when processing approvals. The only difference is that the approval can only be commented on and marked as "Seen" by tapping **Mark seen** instead of being approved or returned. If "Notify responsible" is selected the approval is shown in the responsible user's inbox, notifying them that the approval was seen and perhaps commented on. See the figure below.

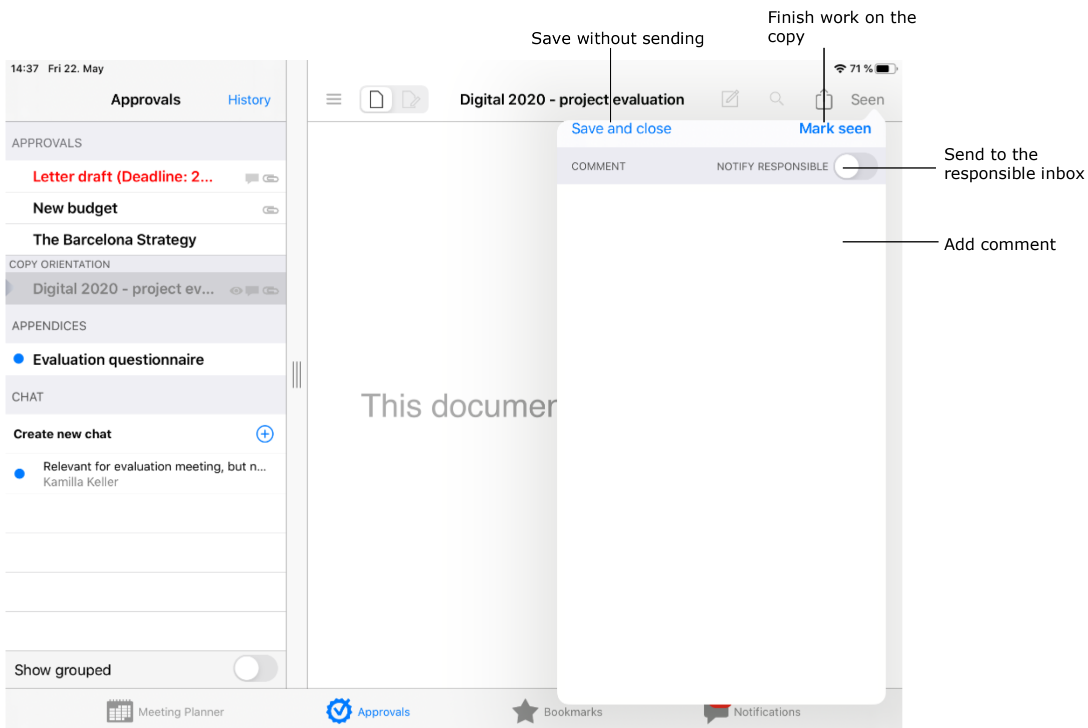


Figure 29: Processing an approval as a copy recipient

Copy orientations disappear after 30 days by default. This can be adjusted by a configuration performed in cooperation with cBrain.

As a chat participant on an approval (chat orientation)

If a user receives a chat on a record that contains an approval, the approval appears in the user's approval list. The user can remove the approval in F2 Manager by tapping **Remove**. See the figure below.

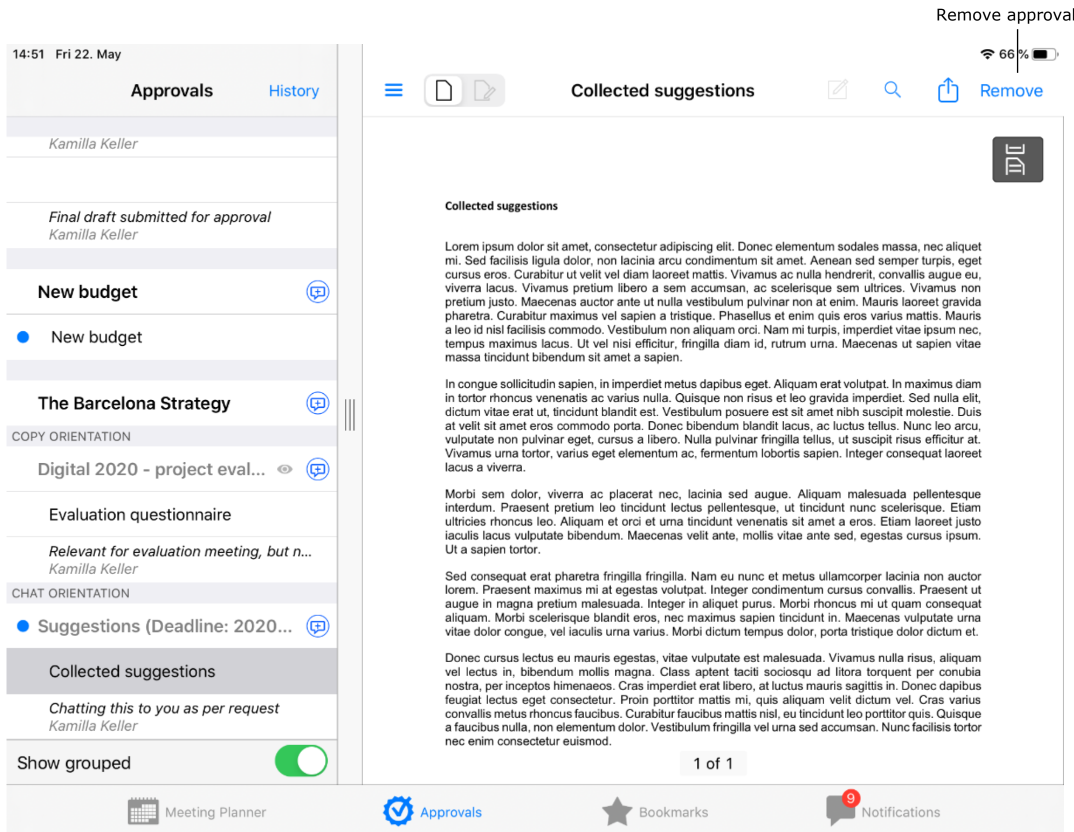


Figure 30: The "Remove" function

The approval will reappear on the user's list of approvals if new chat messages are sent.

By default, F2 Manager removes approvals that were chatted to the user after the final approval. It can be configured so approvals received through chats remain on the iPad even when they have been finally approved. With this configuration, approvals remain on the iPad for a limited number of days by default. This is typically set to seven days.

The configuration is performed in cooperation with cBrain.

Approval history

In F2 Manager approvals completed within the past five days can be searched for and viewed. This allows users to have an overview of active and completed approvals. Open the approval history by tapping **History** at the top of the approval list in F2 Manager.

Approvals displayed here can be accessed the same way as the active approvals in the approval list for easy access to information regarding previous approvals.

The size of the history log can be configured. The synchronisation time may increase as a consequence of the increased amount of data. The configuration is performed in cooperation with cBrain.

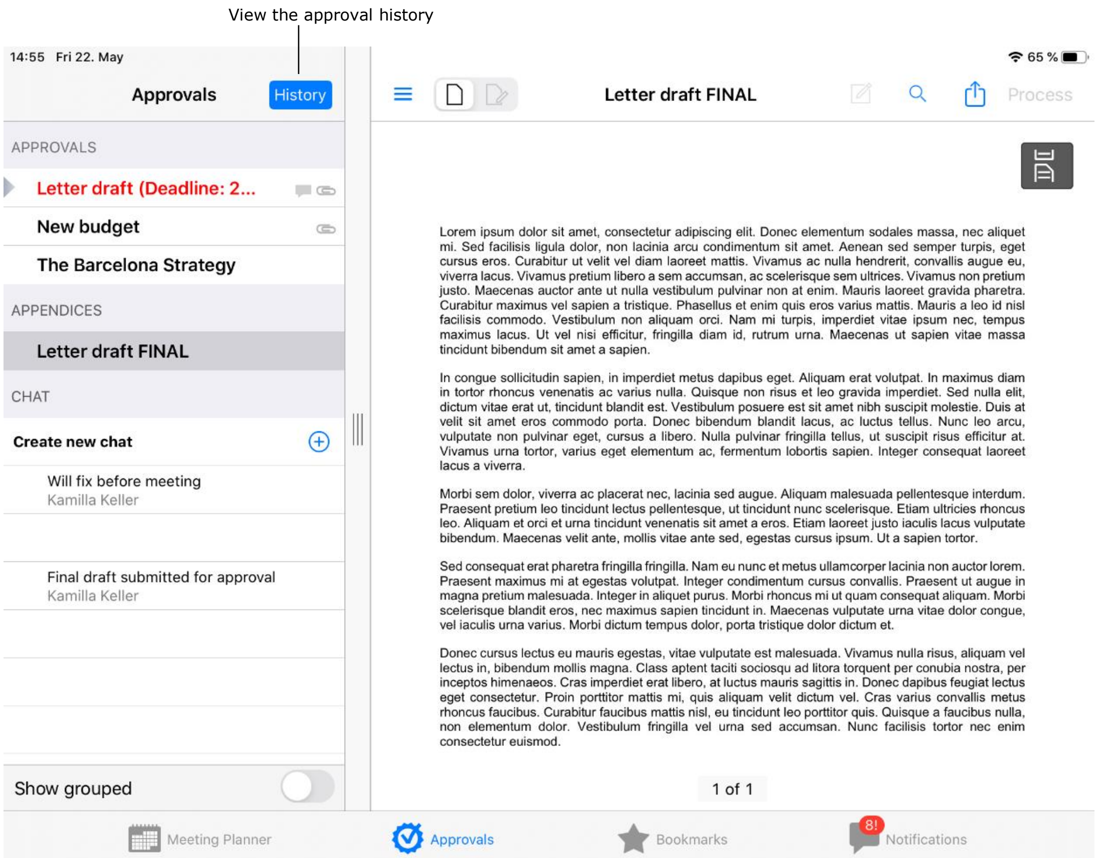


Figure 31: The location of the approval history

Managing synchronisation problems

Synchronisation conflicts may occur when managing approvals. There are several reasons for this. Normally it is because a user has performed changes in F2 Desktop while F2 Manager was offline.

For example, if F2 Manager was offline while a user processed an approval, and the approval was processed in F2 Desktop in the meantime, then a synchronisation conflict occurs in F2 Manager once the user is online again. This is because the approval cannot be sent from F2 Manager as it has already been approved or returned by another user in F2 Desktop.

In managing these situations, the F2 Manager app was designed so the app user is confronted with as few of the issues as possible.

If synchronisation problems occur, F2 Manager shows a message saying, “The element could not synchronise with F2” under the notification for the affected element. The user or their colleagues can then manage the problem in the office where a solution is easier to find.

If a user has a private office to manage approvals, the "From iPad – sync problem" flag is set on the approval to notify the private office of the synchronisation problem. Users without a private office receive a notification of the synchronisation problem in F2 Manager themselves. Synchronisation problems must be resolved by the participants who have updated the document.

Bookmarks

Bookmarks are used as an easy method of accessing a given document again at a later time.

To place a bookmark, select the document in the meeting planner and tap ☆ in the upper right corner. The bookmark can be saved with a title, a description and a date. By default the bookmark is given the same title as the document.

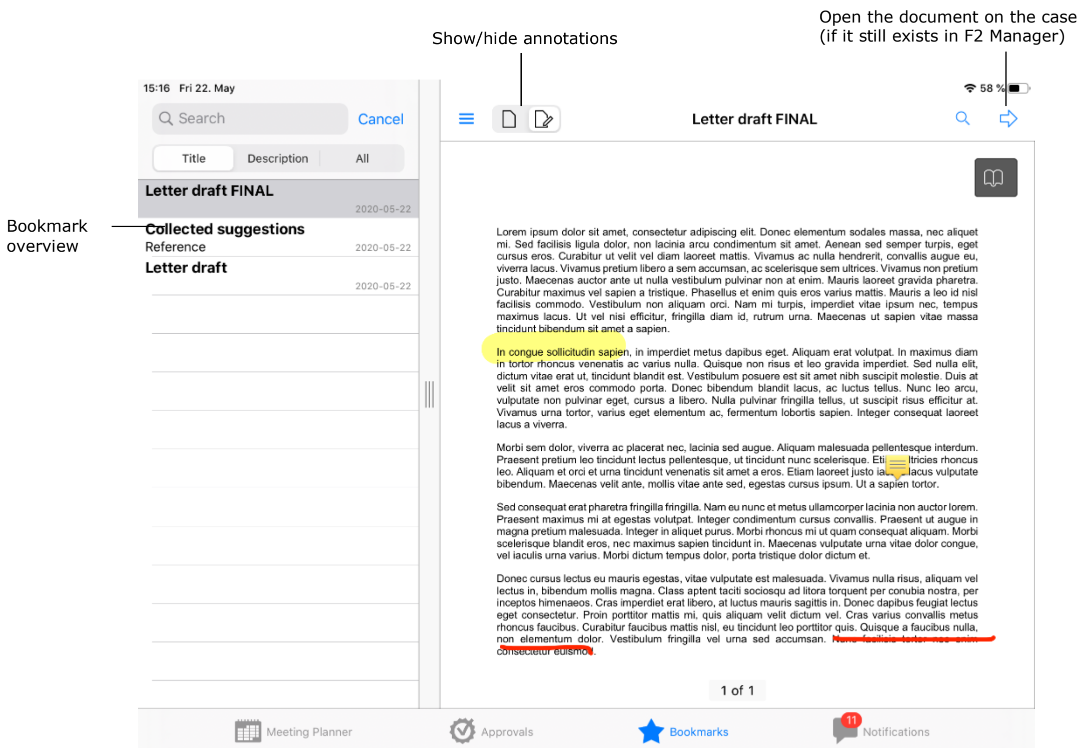


Figure 32: The bookmark list

Note: Only material in F2 Manager's meeting planner can be bookmarked.

The list of bookmark is accessed from the ribbon at the bottom of F2 Manager. The list shows the user's bookmarks listed chronologically, sorted by the saved date.

It is possible to perform searches in the bookmark list. This is done from the upper left corner in the "Search" field. Searches can be performed on both titles and comments in the bookmark list.

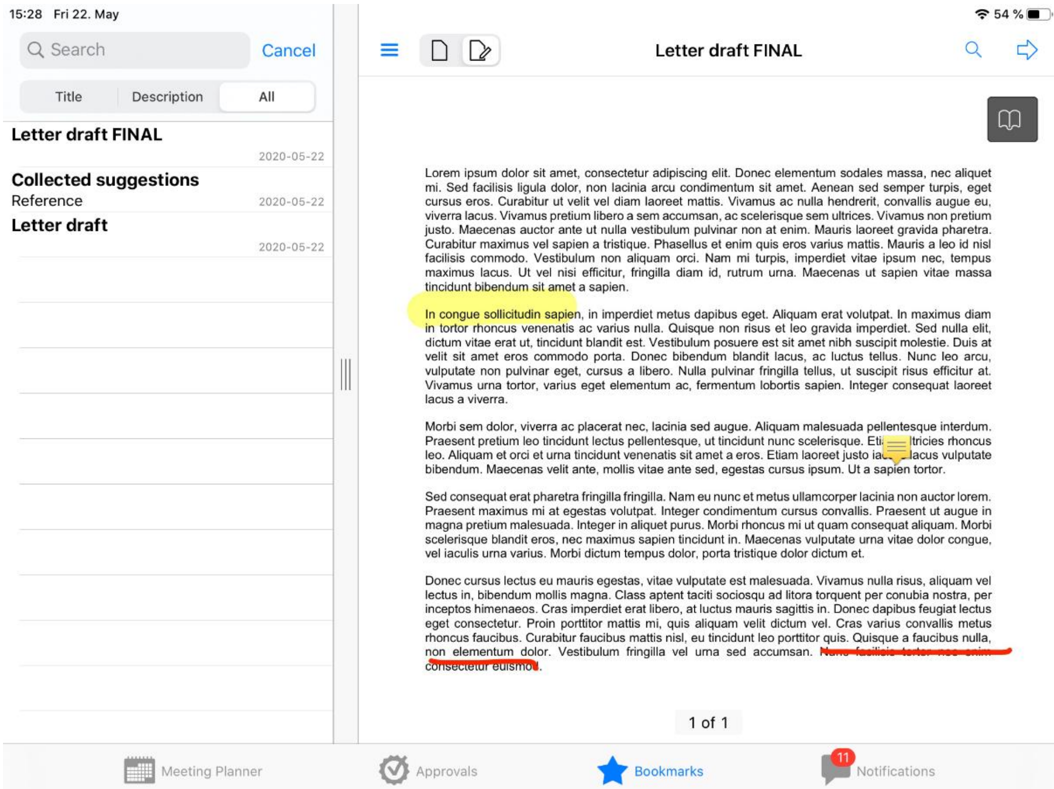


Figure 33: Searching in the bookmark list

To edit a bookmark, go to the bookmarked document in the meeting planner and tap ★. The bookmark's title, description and date can then be edited. Access the bookmarked document from either the meeting planner or by selecting the bookmark in the bookmark list and tapping on ⇨ in the upper right corner.

Bookmarks can be deleted from the bookmark list. Go to the bookmark list and place a finger on the bookmark to be deleted. Swipe left, and the delete function appears in the right side of the bookmark list. Delete the bookmark by tapping Delete.

Notifications

Access the notification list by tapping **Notifications** in the bottom ribbon of F2 Manager. The list shows all updates along with the user's unread elements such as chats and records for approval.

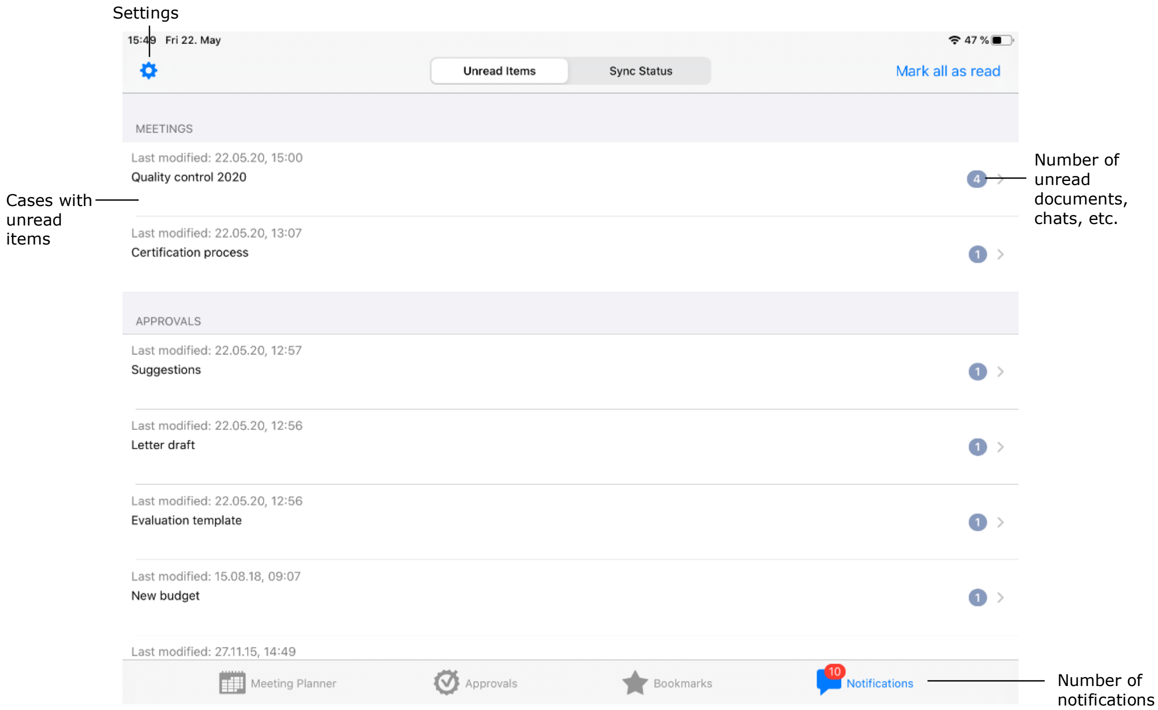


Figure 34: Unread notifications

Synchronisation status

Notifications also contain information about an element's (such as an approval's) synchronisation status. If issues occur during the synchronisation of an element, this is evident from the notification overview. Tap **Sync status** at the top of the screen to view the synchronisation status list. See the figure below.

An action that cannot be synchronised can be cancelled by tapping ⓘ and selecting **Drop action**. The action can be postponed by selecting **Try again later**.

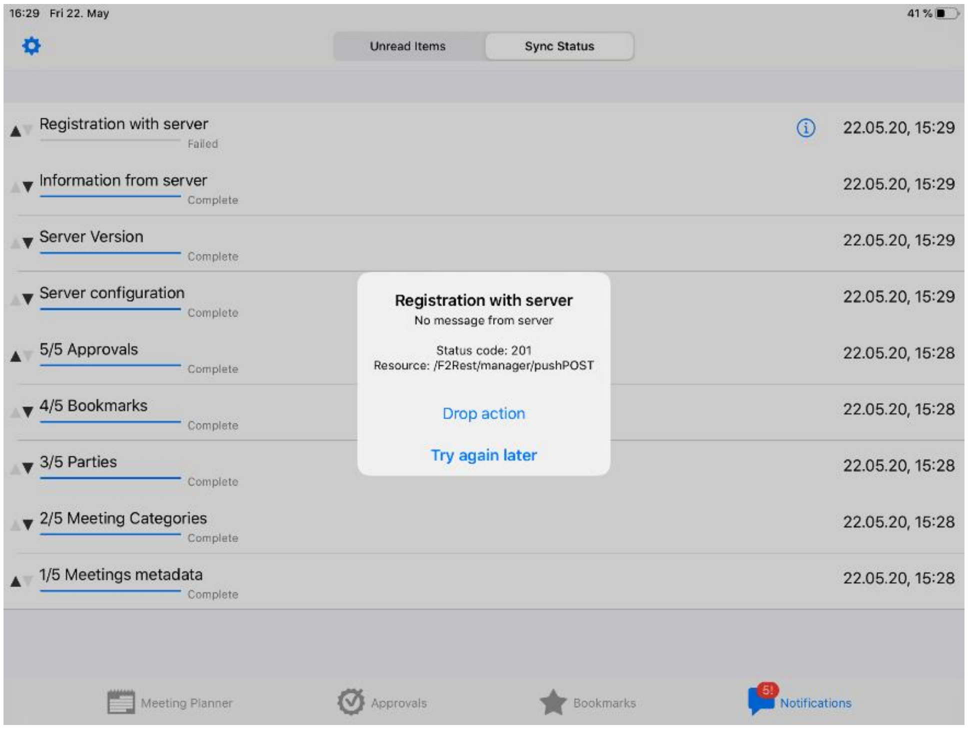


Figure 35: The synchronisation status

Push notifications

F2 Manager supports push notifications. This means a user receives ongoing messages about new activities and updates regarding F2 Manager. Push notifications are received when:

- A new ad hoc meeting or a meeting created using the add-on module F2 Meetings is ready to be synchronised to the user's iPad.

  There are some exceptions to this. For example, if the end time of a meeting is changed while the meeting is inactive.
- A record with an approval reaches the step where the user has been set as either approver or copy recipient.
- The user has received a chat on a record that contains an approval.
- The user has received a chat on an agenda item on a synchronised meeting.
- A meeting time is changed for an active meeting.

Push notifications are displayed with a title. The record title is also included for notifications regarding chats and notes. See the figure below.

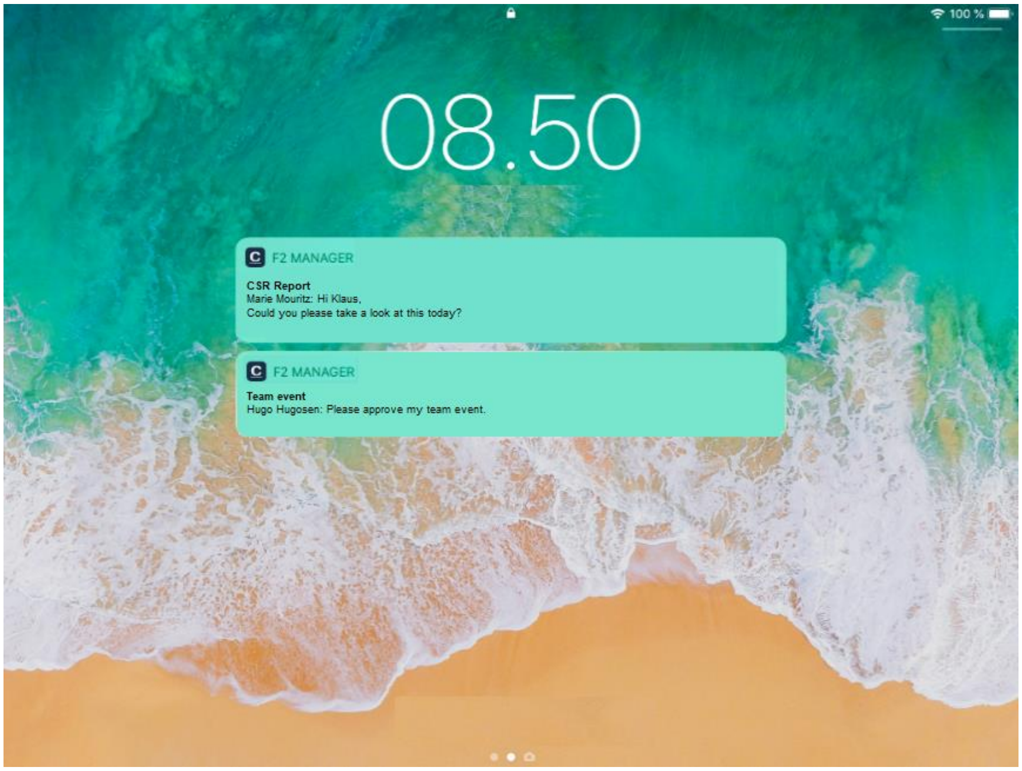


Figure 36: Push notifications on F2 Manager

Working with documents

In F2 Manager it is possible to navigate and work with documents by e.g. searching for and adding annotations to documents.

Navigating in a document with multiple pages

A document in F2 Manager can be scrolled through just like in other PDF viewing programmes. If the document consists of multiple pages, a navigation bar can be displayed at the bottom of a page by tapping the document while in preview. See the figure below.

The navigation bar is used for scrolling through the document’s pages by sliding a finger across the page icons. Tapping a page also causes a page turn.

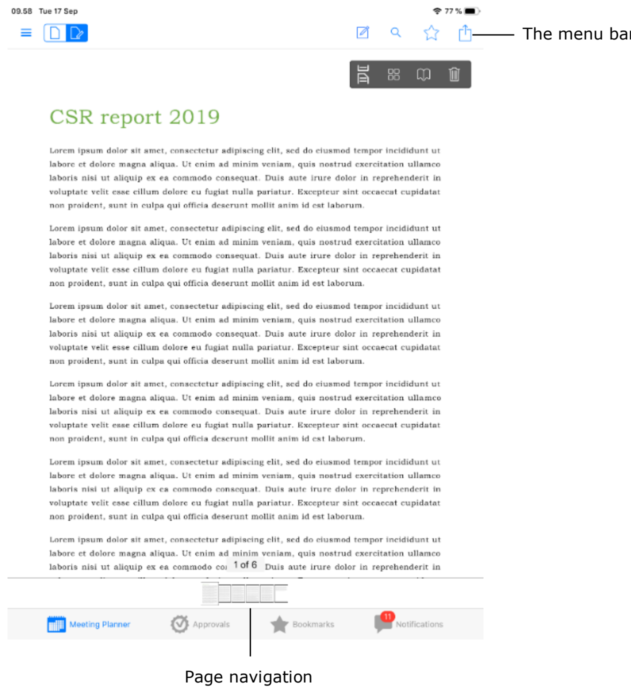


Figure 37: Page navigation

Miniature view for documents

A document consisting of multiple pages can also be displayed in a miniature view in F2 Manager. This makes it quick and easy to navigate the document.

Activate the miniature view in a document by tapping the previewed document and then the miniature icon .

Read a record document and its attachments in a single document

In F2 Manager, a record and its attachments can be collected in one read-only document. This is especially useful if a user is attending a meeting and must read an agenda item that is more than a few pages long, along with several related attachments. Instead of reading several separate documents, they are all collected into a single, larger document that includes all of the records contents. The procedure for this is as follows:

- **Step 1**: Select the agenda item (record) to be collected.
- **Step 2**: Tap the document. The icons appear at the top.
- **Step 3**: Tap the read-only mode icon . The agenda item and its attachments are then collected in one document.

> **Note**: The agenda item list (records) on the left side always shows which document or attachment that is being viewed.

Document search

Tap the magnifying glass on the menu bar in the upper right corner to perform a free-text search in all documents in F2 Manager. The availability of this function depends on the server's configuration.

Add annotations

Annotate documents in F2 Manager in the following way:

- **Step 1**: Select the document to annotate. A preview of the document is displayed to the right.
- **Step 2**: Tap the annotation button on the menu bar.
- **Step 3**: Tap the wanted annotation function on the toolbar, e.g. the text highlighter .
- **Step 4**: Run a finger over the text to highlight it or draw a circle around the text to mark it.
- **Step 5**: Tap **OK** in the upper right corner when the annotation is finished. The annotation is then automatically saved to the server.
- **Step 6**: Tap on the menu bar at the top to switch between the original document and the annotated document.

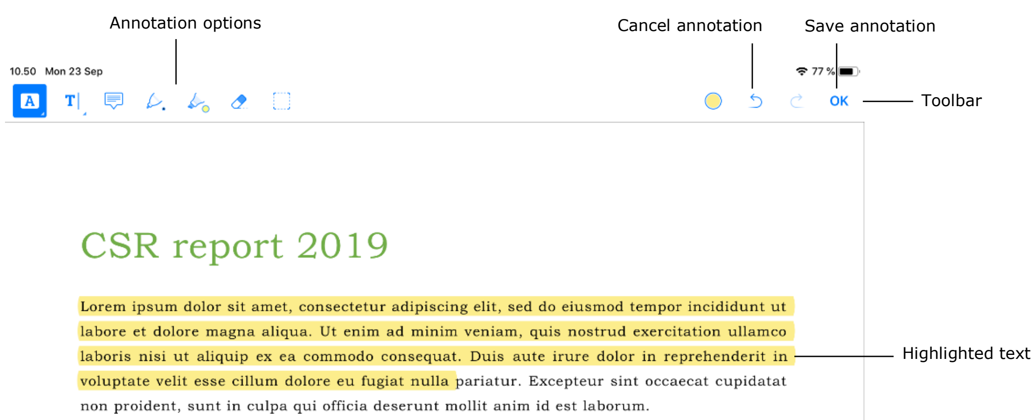


Figure 38: Annotating a document

Annotations can also be made outside of F2 Manager. Tap **Document interaction** to open the document as a PDF file, or open the document's attachment in original format (the original format depends on the iPad's configuration). The document can then be edited using a third-party app. After editing, the document can be sent back to F2 Manager.

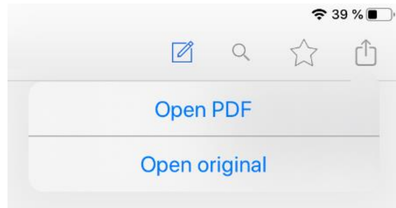


Figure 39: Options when tapping "Open in"

> **Note**: Changes to the text formatting may occur when using a third-part app before the document is sent back to F2 Manager.

F2 Manager's different annotation functions can be seen below:

Icon	Function	Purpose	
	Highlight	Tap this icon to highlight text using different colours. Press the icon, and several options appear that are all variations of the highlight function:	
			Highlight in colour (default).
			Underline text with a straight line.
			Underline text with a wavy line.
			Strikethrough text.
	Text box	Tap this icon to insert a text box in the document. Press the icon, and several options appear that are all variations of the text box function:	
			Text box (default).
			Text box with an arrow. The arrow can be moved.
			Signature. Insert a saved or new signature in the document.
	Yellow note	Tap this icon to insert a yellow note in a document. It is possible to write in the note. Tap the document to close the note. Tap the note to open it again.	

Icon	Function	Purpose
	Write text/draw	Drawing tool (default). User a finger to write comments or draw circles, etc. in a document.
	Highlighter	Tap this icon to highlight parts of a document using a finger.
	Delete annotations	Tap this icon to delete all annotation or parts thereof in a document. Annotations made by hand can be deleted either completely or partly. Text boxes are deleted completely by using the eraser icon.
	Select annotations	Tap this icon to select one or more annotations in a document. Annotations can e.g. be deleted or moved.

Locate annotations in large documents

It is possible to search for annotated pages.

- **Step 1**: Tap the document in the preview to view the annotated version of the document.
- **Step 2**: Tap the miniature icon to display a miniature view of the document's pages.
- **Step 3**: Tap the button above the miniature view to view either all the document's pages or only the pages containing annotations. Tap **Annotated** to only view annotated pages.
- **Step 4**: A miniature view of all the annotated pages in the document is displayed.

> **Note**: The document view always starts in annotation mode in F2 Manager, if there are annotations in the document.

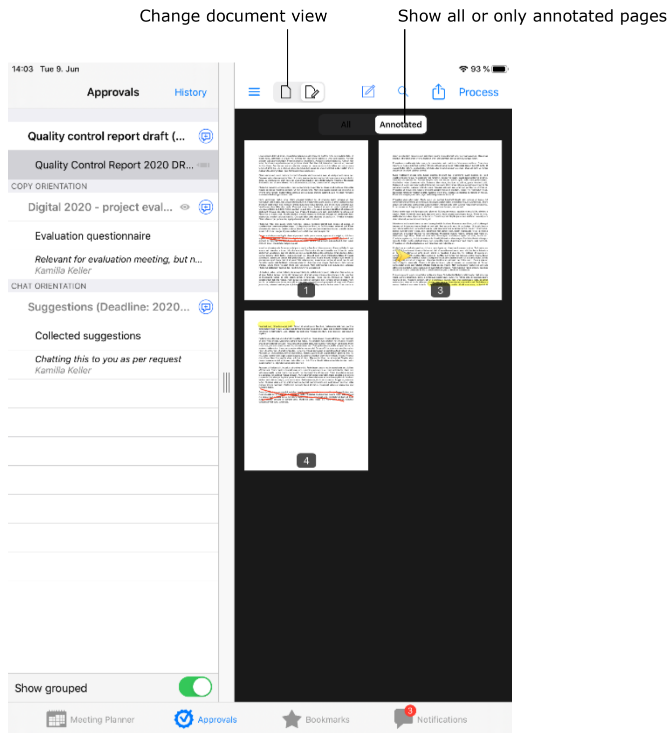


Figure 40: F2 Manager's miniature view of annotated documents

It is also possible to view a list of annotations including the creation time and the name of the creator. Tap the open book icon to view the annotation list. Every annotation can be deleted by swiping left and selecting **Delete** as shown in the figure below. Annotations can be searched for in the search field above the annotation list.

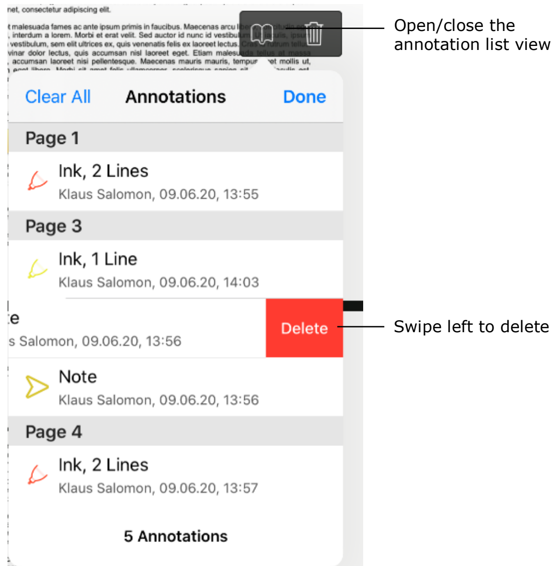


Figure 41: The list view when searching for annotations

If a document, which was annotated in F2 Manager, is updated using F2 Desktop or F2 Touch, the annotated version is not updated. The changes in the document can be made available for annotation by deleting the old annotation document. Delete the annotation document by tapping . New annotations can then be performed in the updated document.

Delete annotations

Delete document annotations in F2 Manager by following these steps:

- **Step 1**: Select the document with annotations (the annotation document) to be deleted.
- **Step 2**: View the annotated document in the preview by tapping on the menu bar.
- **Step 3**: Tap the recycle bin icon at the top of the annotation document.

  If the recycle bin icon is not visible, it is not the annotation document that is being viewed.
- **Step 4**: Tap **Delete** to confirm deletion of the annotated document.

Print document

Documents can be printed from F2 Manager. To do this, tap the **Document interaction** button while the document is open. Tap **Open PDF** to view the "Share" menu. From here it is possible to make the annotations editable after sharing, but this does not affect the printing process.

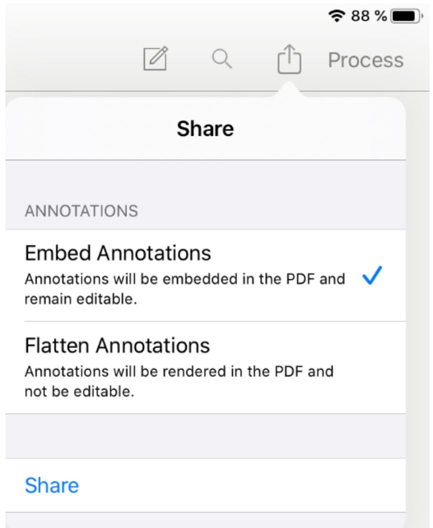


Figure 42: Document printing options

Select the wanted version of the document and tap **Share**. From the overview of apps to which the PDF can be shared, select **Print**.

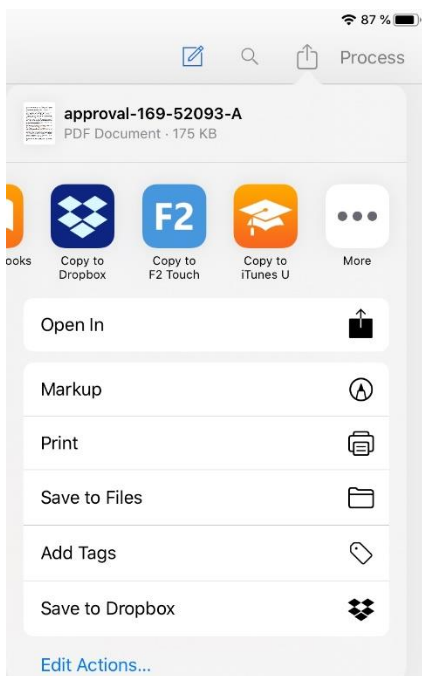


Figure 43: Tap "Print" to share the PDF with a printer

Select a printer and the number of copies to print. Then tap **Print** again to carry out the printing job.

Note: A printer must support AirPrint in order to communicate with the iPad.

Configuration options

The configuration of F2 Manager is performed on an installation level to fit the organisation and its working procedures. The following can be configured in cooperation with cBrain:

- It is possible to restrict a user's access so they can only log in via F2 Manager. This means that the user is excluded from using F2 Desktop and F2 Touch.
- The system can be configured so that ministers can only be added to meetings by users acting "on behalf of" the minister. This can also be applied to heads of department.
- The default value for adding records to ad hoc meetings (Automatically/Manually) can be configured to apply for all users.
- The default time periods for when a case is available on the iPad can be configured so the values are convenient to the organisation.
- The gatekeeper function must be activated through a configuration before it can be used.
- In addition to the four default flags, a number of private office flags can be configured to control the synchronisation of approvals. This could e.g. be to mark an approval as a "Priority". It is possible to configure a standard colour for every flag.
- It is possible to configure the approval processing options of an F2 Manager user with the gatekeeper function. The F2 Manager user can either have full access to all return options or be limited to either conditionally return or approve.
- Approvals received for copy orientation disappear after 30 days by default, but this can be configured to fit the organisation's needs.
- It is possible to keep chat-oriented approvals on the iPad even when finally approved. If this configuration is applied, approvals remain on the iPad for a limited number of days – typically seven days.
- The **Send directly** processing option can be activated. **Send directly** enables F2 Manager users to send approvals directly to a head of department or a minister, bypassing the private office.
- It is possible to configure the display of approval documents, so they are either shown in a separate record and approval documents or as one collected document.
- The size of the history log can be configured. The synchronisation time may increase as a consequence of the increased amount of data.

List of figures