F2

Manager

Version 9

9.0.0.15280

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 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 gatekeeper, such as private office or secretariat. The synchronisation settings for records, cases and meetings are set up in F2 Desktop.

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 enables an organisation to share documents through iPads, making 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 gatekeepers can handle approvals on behalf of ministers and other executives using the F2 Gateway Approvals add-on module. Users without a gatekeeper can process approvals in F2 Manager without prior handling on F2 Desktop as described in the section *Synchronising approvals.*

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.

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. How to synchronise approvals is described briefly in the *Synchronising approvals* section. 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 also automatically attached to an ad hoc meeting. Ad hoc meetings can also 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.

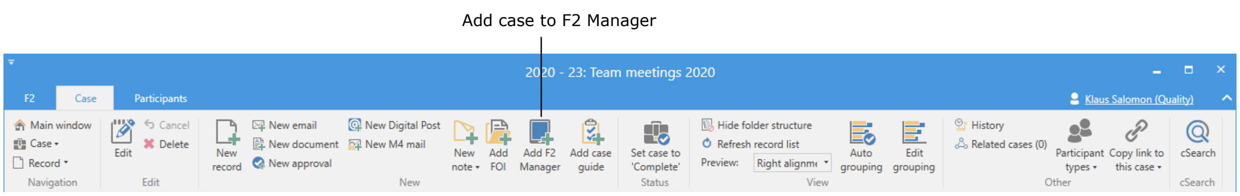

Figure 1: Add case to F2 Manager

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.

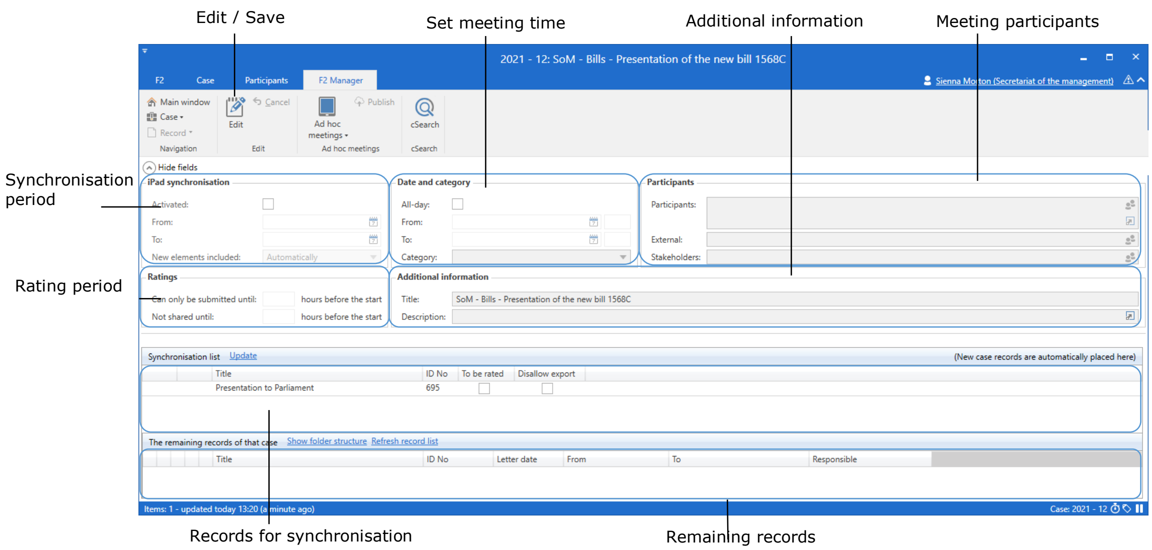

Figure 2: The "F2 Manager" tab in the case window

Click on **Edit** in the ribbon to enter edit mode and set up the synchronisation of the F2 Manager meeting. 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

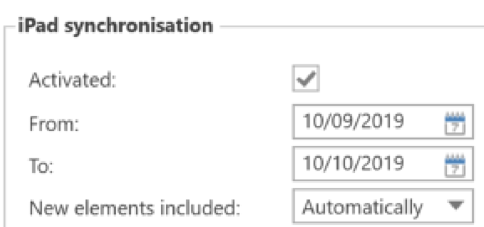

Figure 3: Synchronise to iPad

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 standard values unless they already contain data. This is useful if the user wants a meeting time of "Now" with a standard synchronisation period.

Date and category

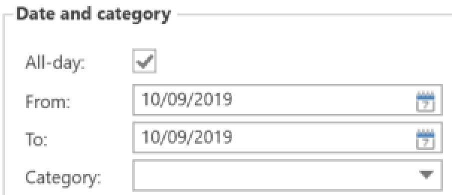

Figure 4: Date and category

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.

A start and finish time can be specified for the meeting. If the meeting lasts an entire day, tick the "All-day" box. Meetings marked as "All-day" meetings are indicated as such in the F2 Manager app's calendar view. Meetings can last longer than a day even if they have specified "From" and "To" times.

A category can also be selected. 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 authority 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

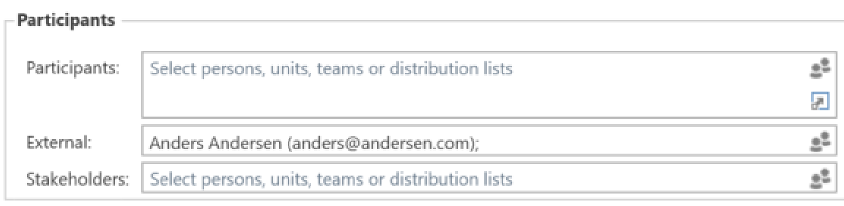

Figure 6: Participants

Meeting participants and stakeholders, both internal and external, are added 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 add meeting participants. Meeting participants receive:

- The option to rate agenda items, if a rating is wanted.
- Read access to the records on the agenda.
- Access to the synchronised records on their iPad in the specified period.

External

The "External" field is used to add external participants who are attending the meeting. A copy of the meeting material can be sent to the added participants using the F2 Web Meetings add-on module.

Stakeholders

The "Stakeholders" field is optional and used to expand the group of F2 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.

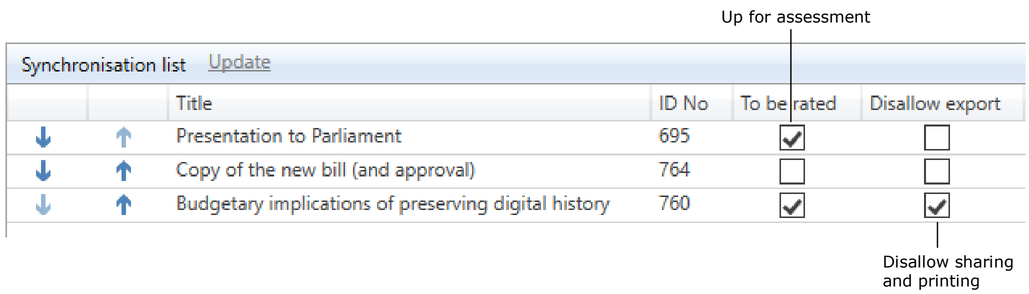

Figure 8: The synchronisation list's records

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.

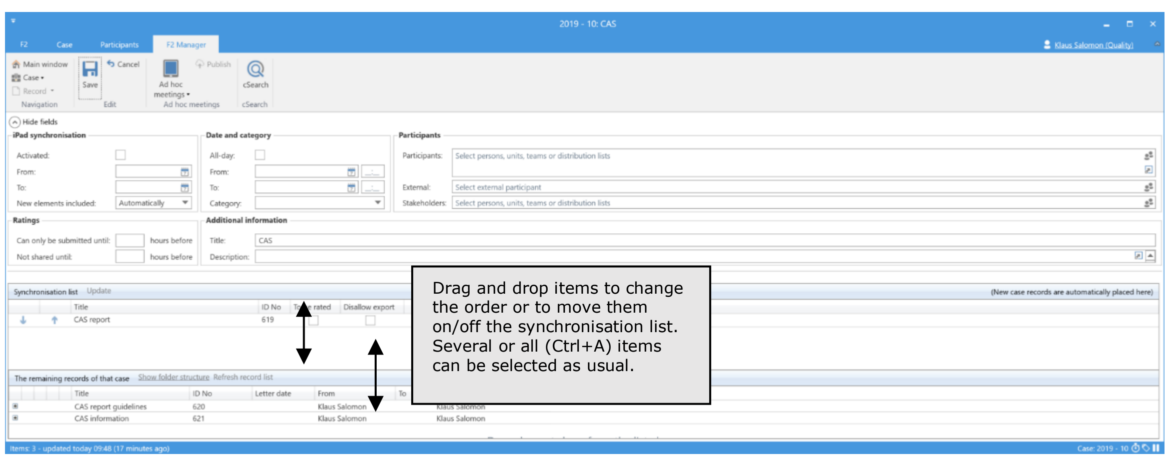

Figure 9: The F2 Manager tab in editing mode

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 the **Ad hoc meetings** menu item and select **New ad hoc meeting** in the drop-down menu 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.

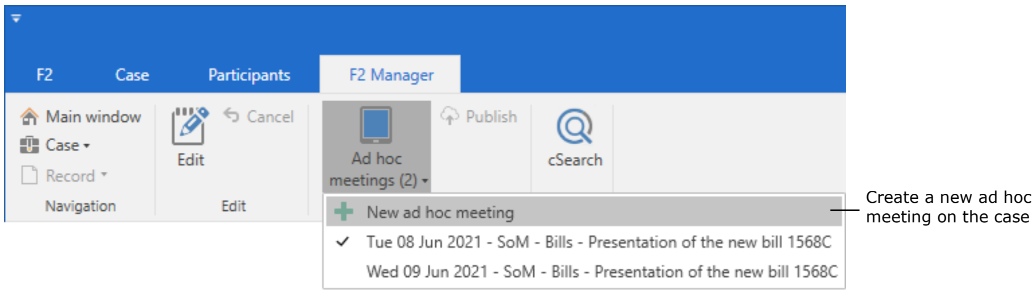

Figure 10: Create and select other ad hoc meetings

Click on **New ad hoc meeting** to create a new meeting on the "F2 Manager" tab. From here the case's records can be accessed.

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 the F2 Manager user themself or by a gatekeeper. Gatekeepers use the add-on module F2 Gateway Approvals. For further information on gateway approvals, contact cBrain.

If a user manages approvals themself, the approvals will appear directly on the iPad as soon as the approval reaches the user's step. 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.

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.

> **Note**: cBrain offers a version of F2 Manager that is compatible with Microsoft Intune. F2 Manager Intune generally has the same functions as F2 Manager and is available on Apple's App Store as "F2 Manager Intune". Contact cBrain for more information.

Setup through Settings

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

Enter username, password and URL in the designated fields.

It is also possible to log in via AD FS using Azure, if the configuration is enabled. When enabled, the regular login method is not available.

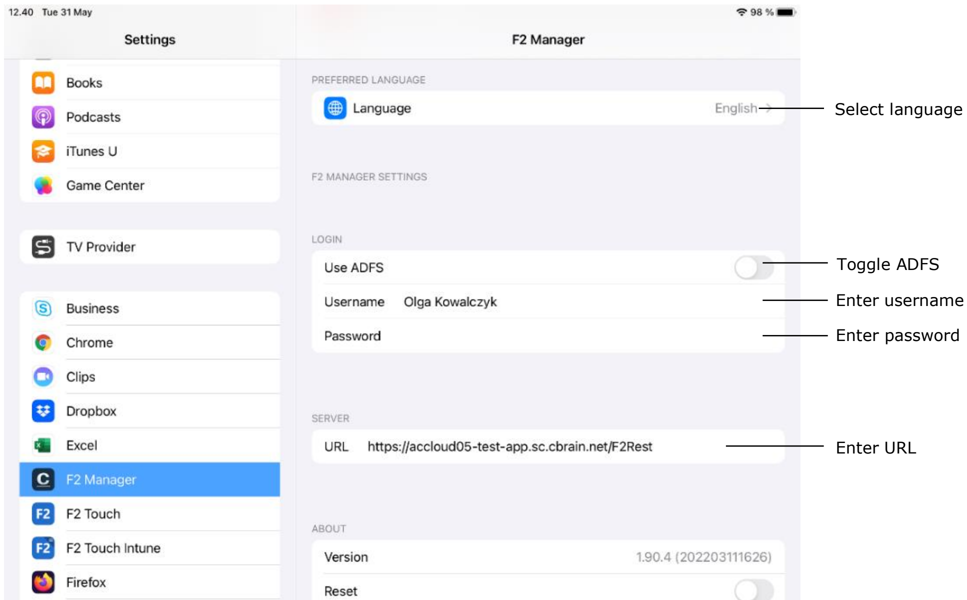

Figure 11: Set up F2 Manager through "Settings"

Above the login fields, it is possible to select a language for F2 Manager. F2 Manager is available in Danish, English and German. If no language is selected in the setup, the app uses the iPad's default language.

Once the setup is done, click on **F2 Manager** to open the app. See the figure below.

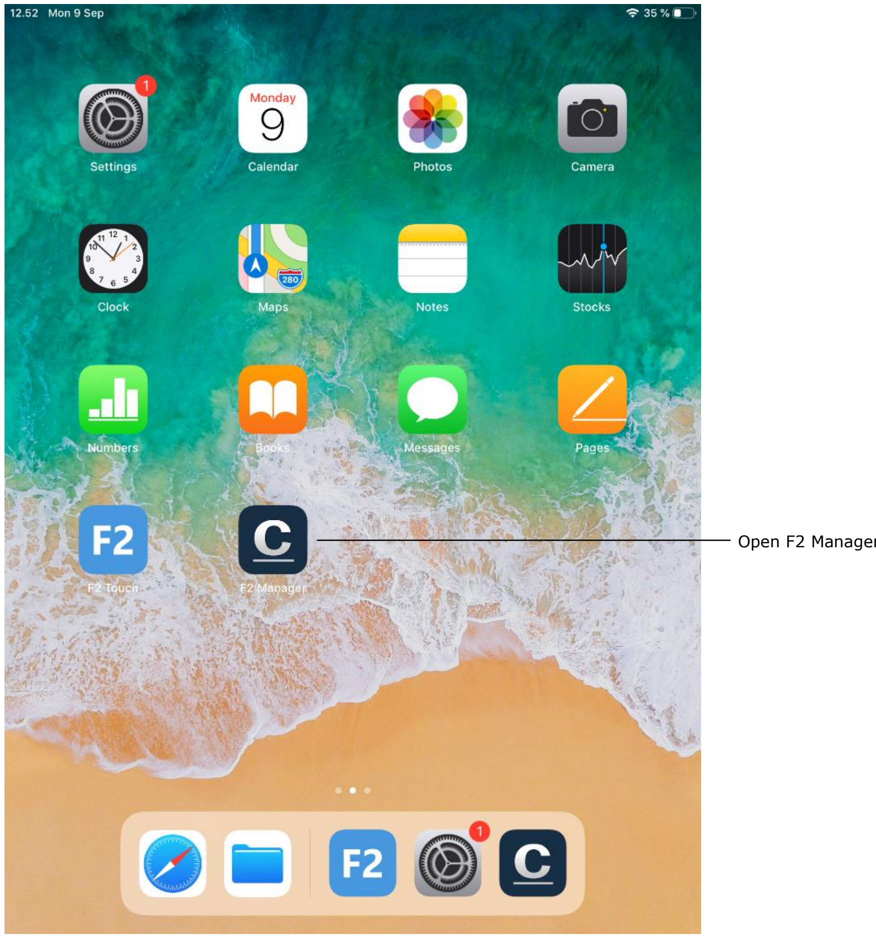

Figure 12: Open F2 Manager

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.

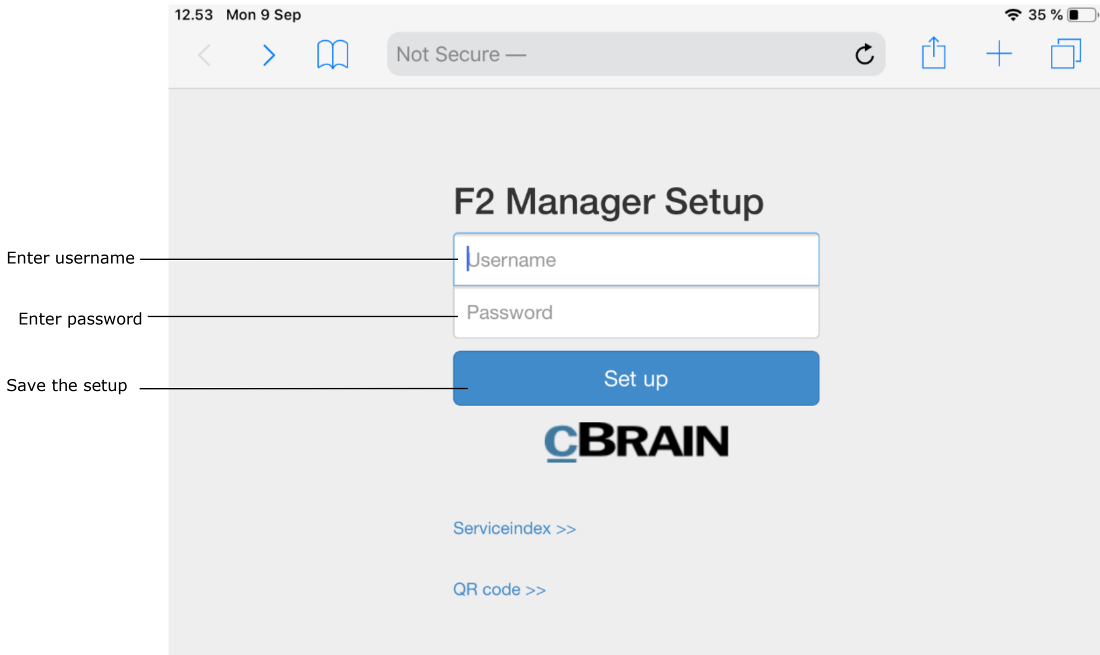

Figure 13: Set up F2 Manager using a web browser

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.

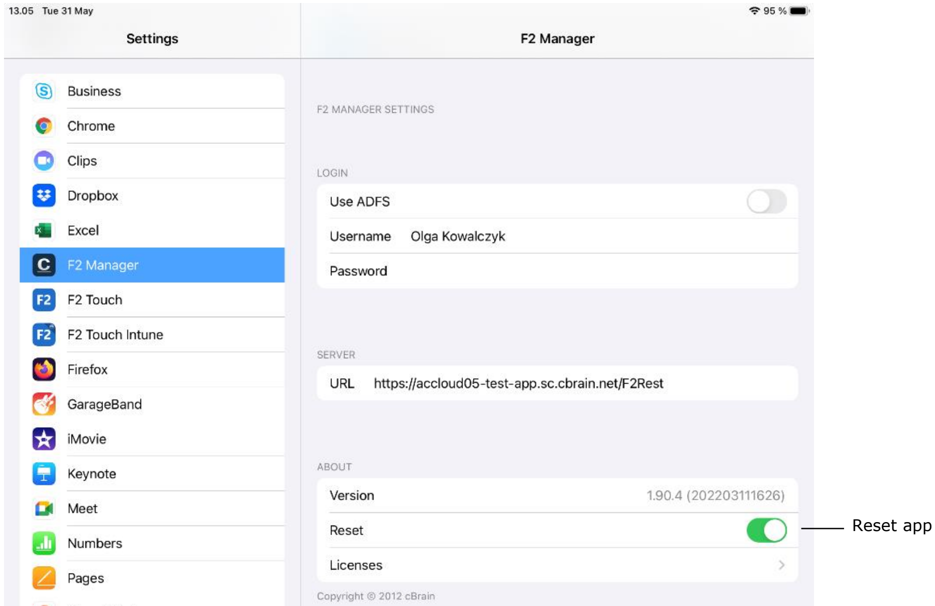

Figure 14: The Reset button in "Settings"

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. Locally saved work includes processing of approvals and sent chats. 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 **Notifications**. From here, select **Settings** and then **Show guide**.

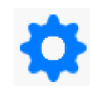

Figure 15: The Settings icon

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.

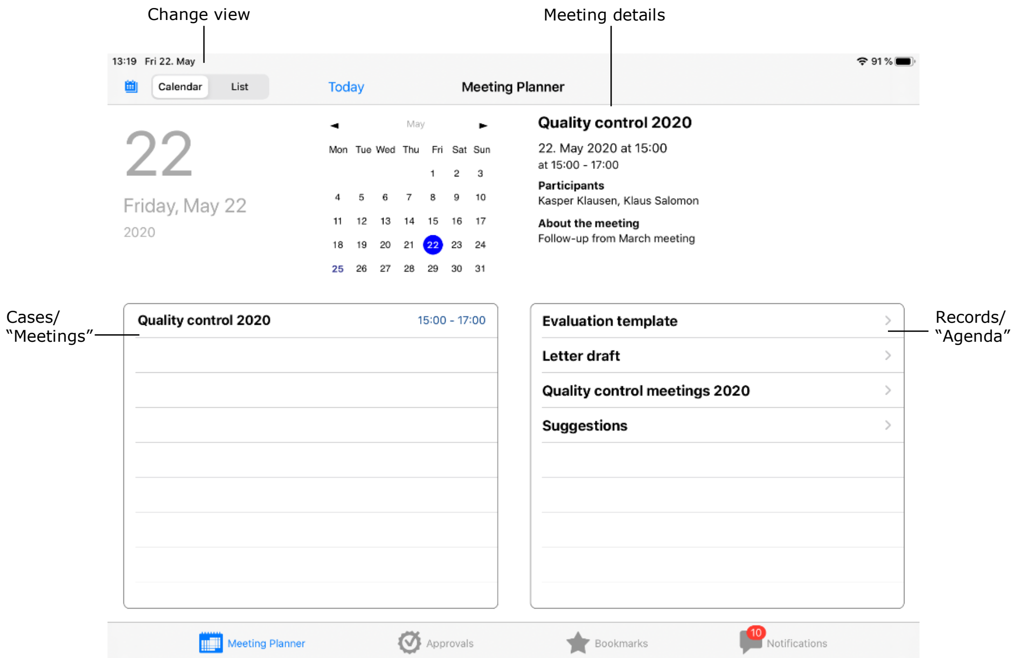

Figure 16: The meeting planner's calendar view

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.

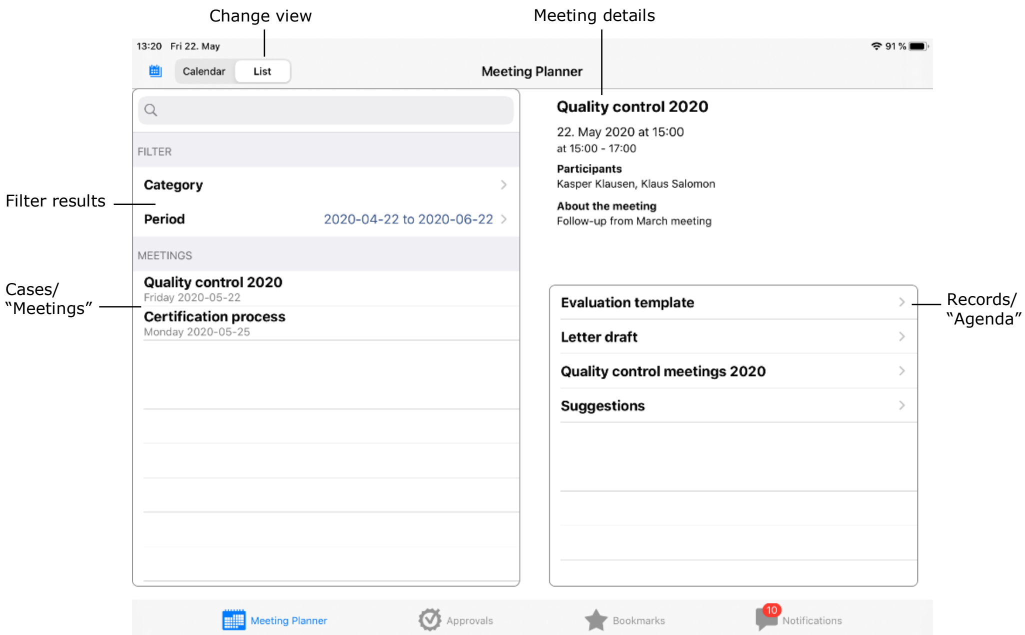

Figure 17: The meeting planner's list view

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.

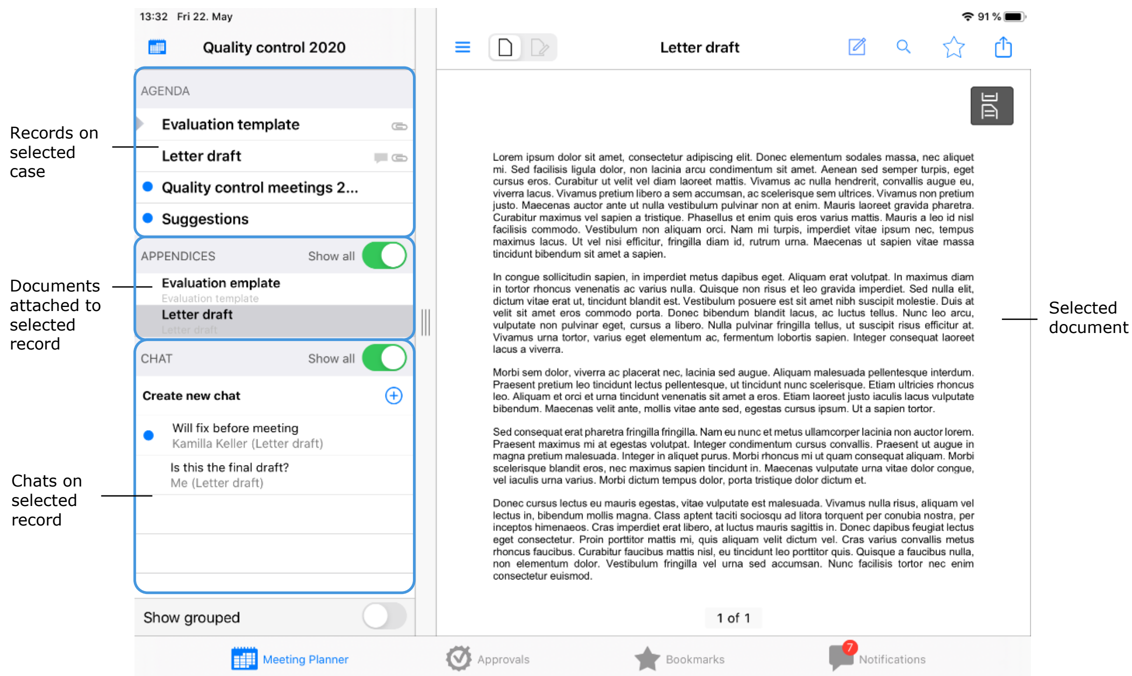

Figure 18: The meeting planner's meeting view

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.

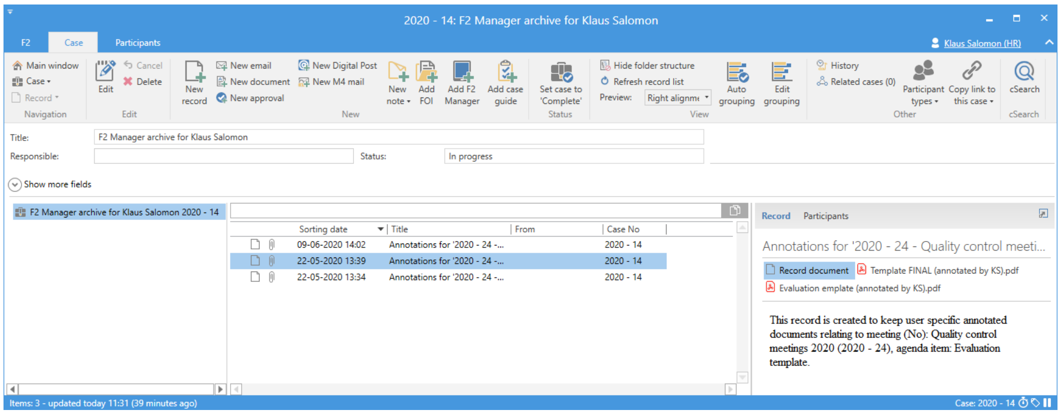

Figure 19: Annotated documents on the same record

> **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. 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.

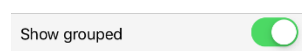

Figure 20: The "Show grouped" function

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

Chats are italicised and located below any attachments. To add a new chat to an agenda item, tap the message icon.

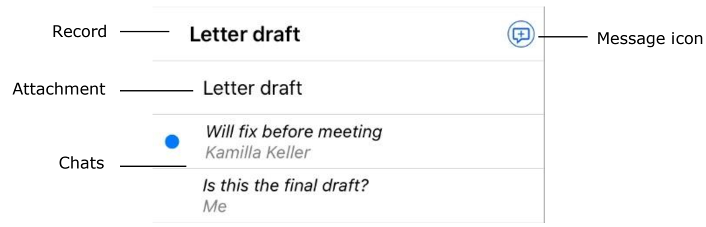

Figure 21: Show grouped in the meeting view

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.

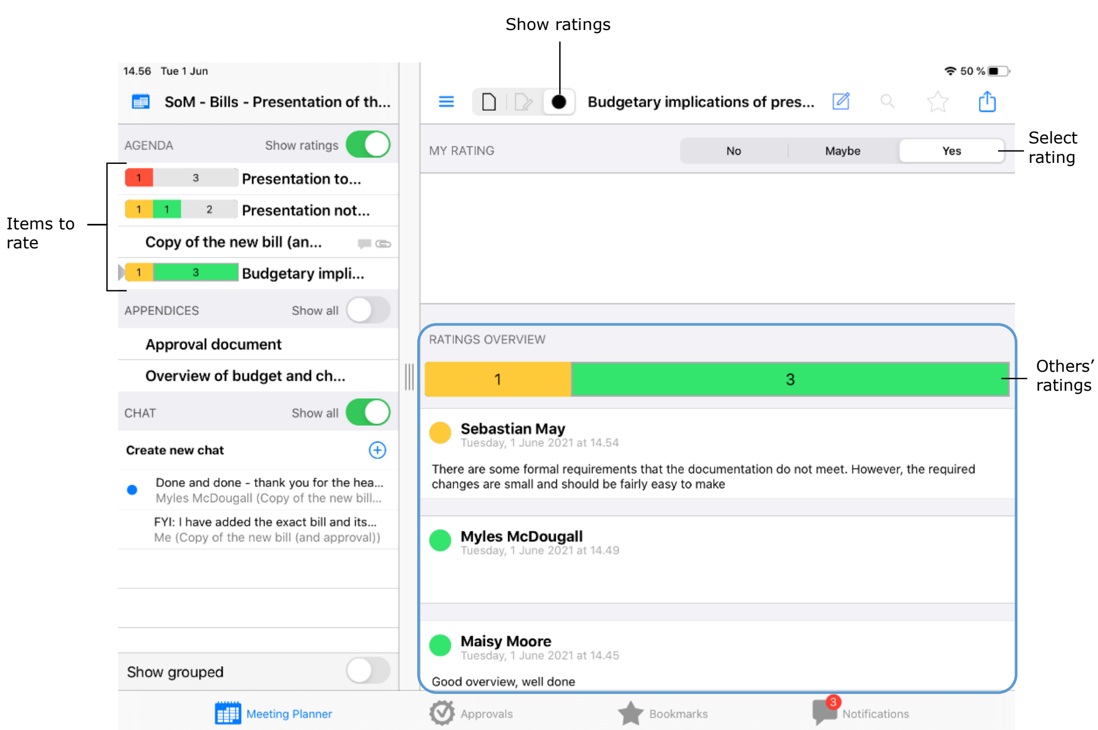

Figure 22: Rating an agenda item in the meeting planner's meeting view

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 bottom ribbon to view a list of all transferred approvals. This may be different for installations with the F2 Gateway Approvals add-on module. If the user is a gated approver, the gatekeeper decides which approvals are transferred to F2 Manager. Some approvals may not be transferred to F2 Manager even though the user is an approver or copy recipient on the current step of the approval. For more information on gateway approvals, contact cBrain.

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.

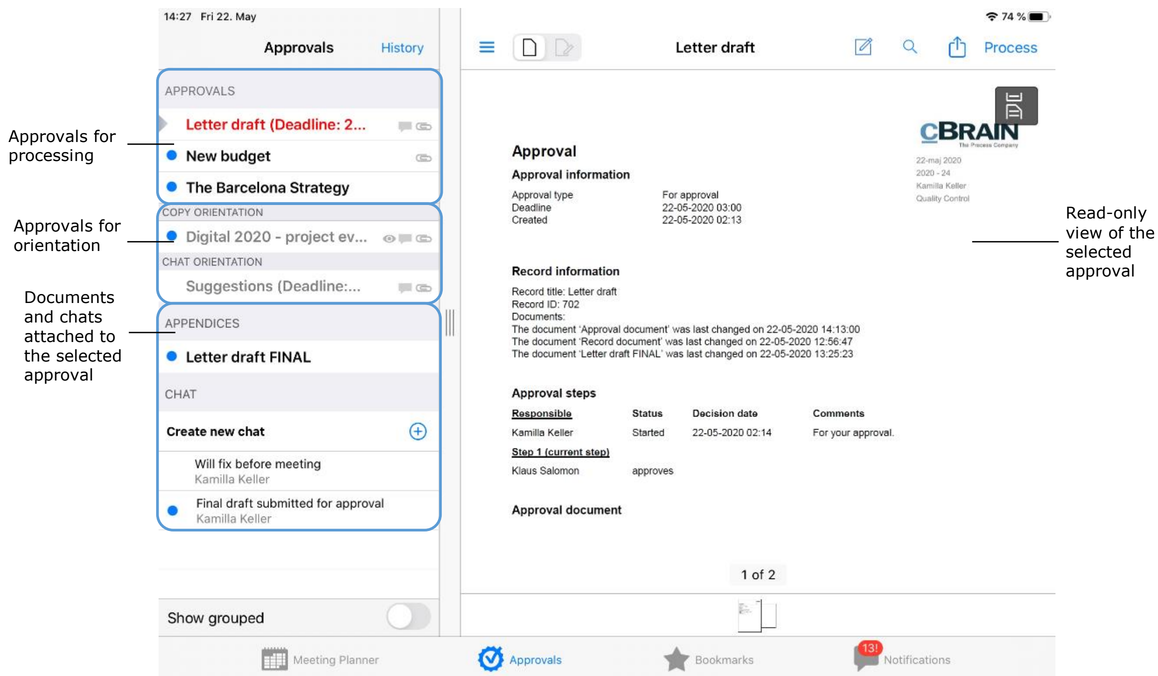

Figure 23: The approval view

Records with approvals are sorted after the following criteria:

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

> **Note**: If the user is a gated approver, the gatekeeper is able to edit the order in which the approvals appear.

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	Description	
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.

> **Note**: An approval record can only contain one F2 Manager PDF. This means that an annotation risk being overwritten if more than one user makes annotations on F2 Manager. The PDF file name always indicates the first annotating user, but not any subsequent users. Read more about managing annotation documents in *Delete annotations* and about best-practice approval setup in the *F2 Approvals* user manual.

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*.

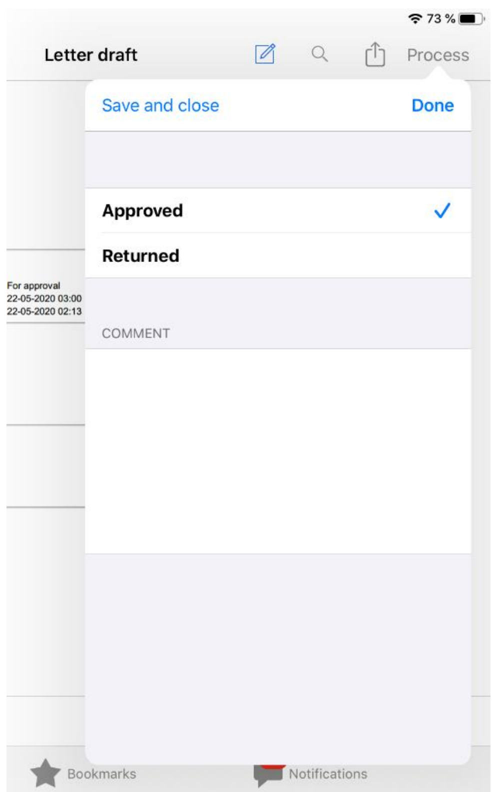

Figure 24: Processing approvals

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.

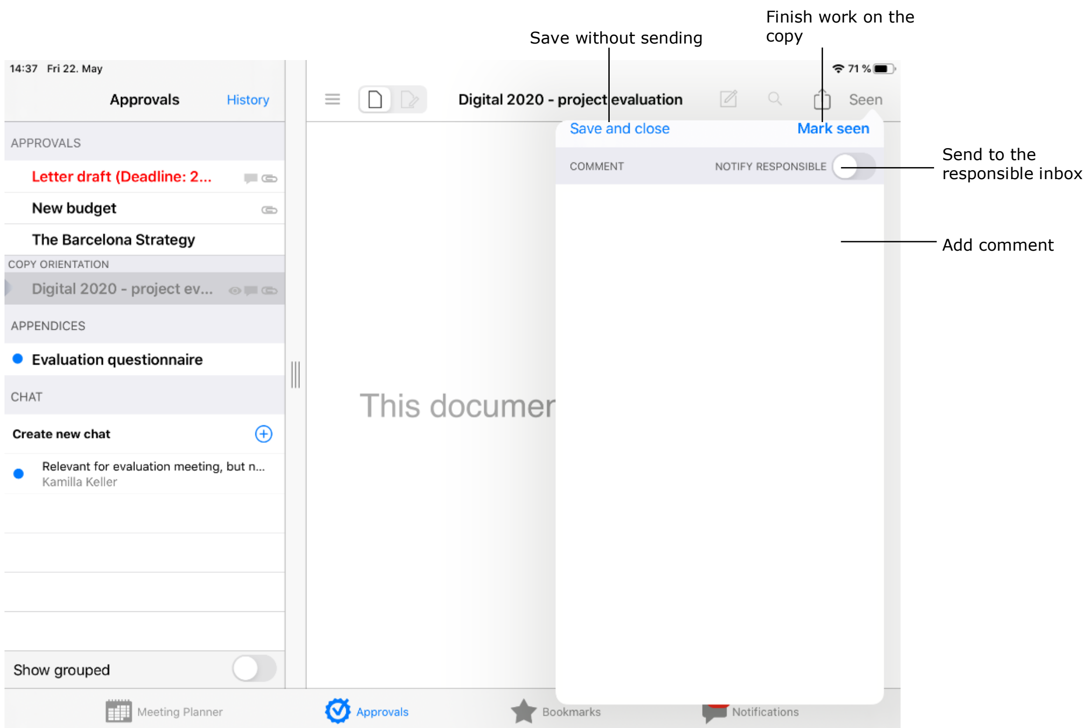

Figure 25: Processing an approval as a copy recipient

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.

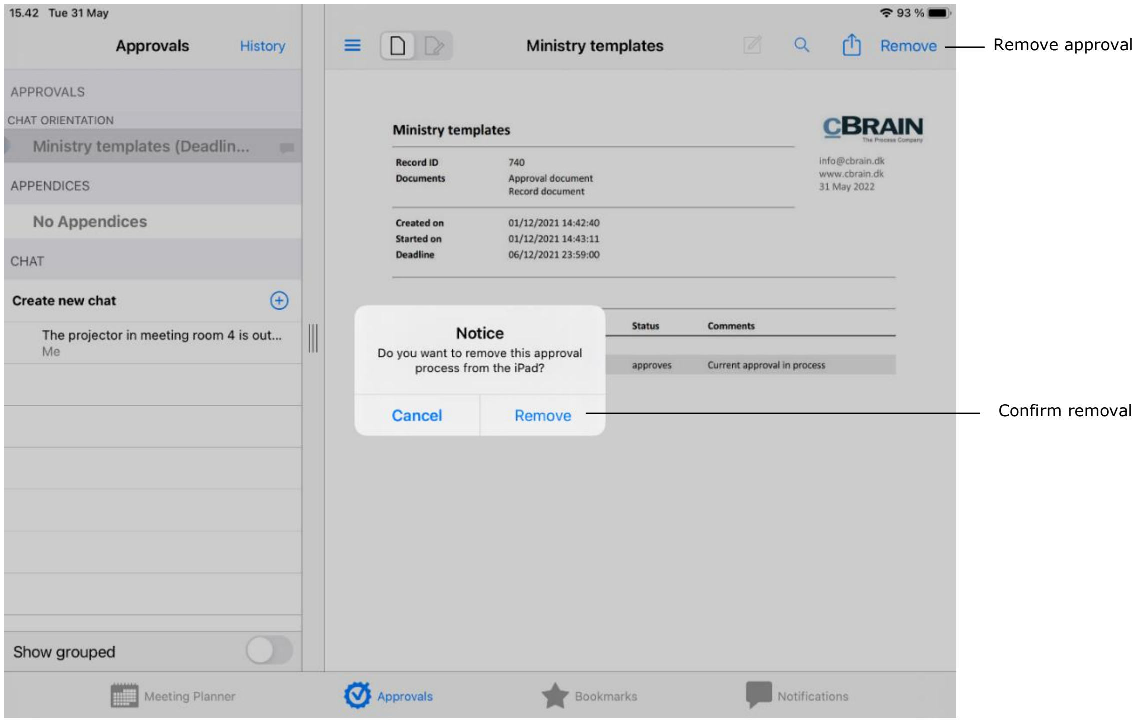

Figure 26: The "Remove" function

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

Approvals displayed in the approval history are accessed the same way as the active approvals in the approval list, allowing for easy access to information regarding a given approval.

The number of days included in 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.

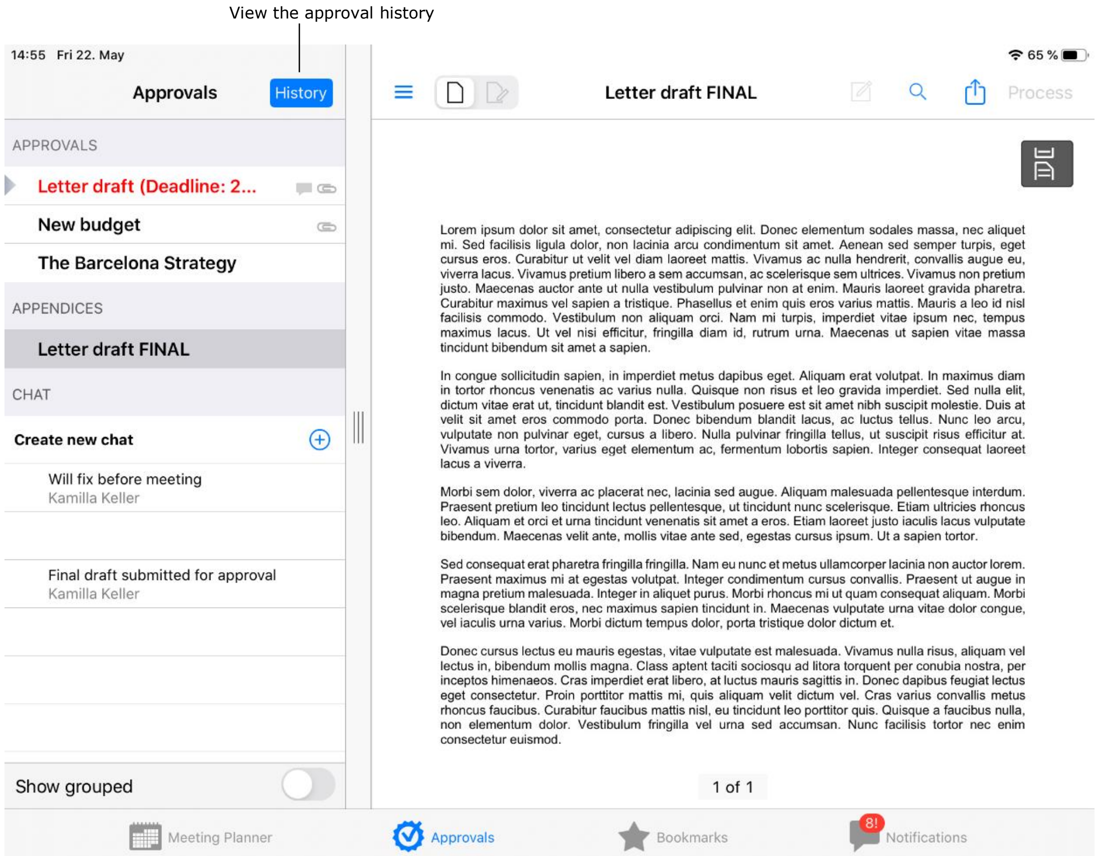

Figure 27: The location of the approval history

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 as well, a synchronisation conflict occurs in F2 Manager once the user is back online. 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.

Note: On installations with the F2 Gateway Approvals add-on module, synchronisation issues are communicated directly to the gatekeeper.

Bookmarks

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

To add a bookmark, select the document in the meeting planner and tap the star icon 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 and the current date.

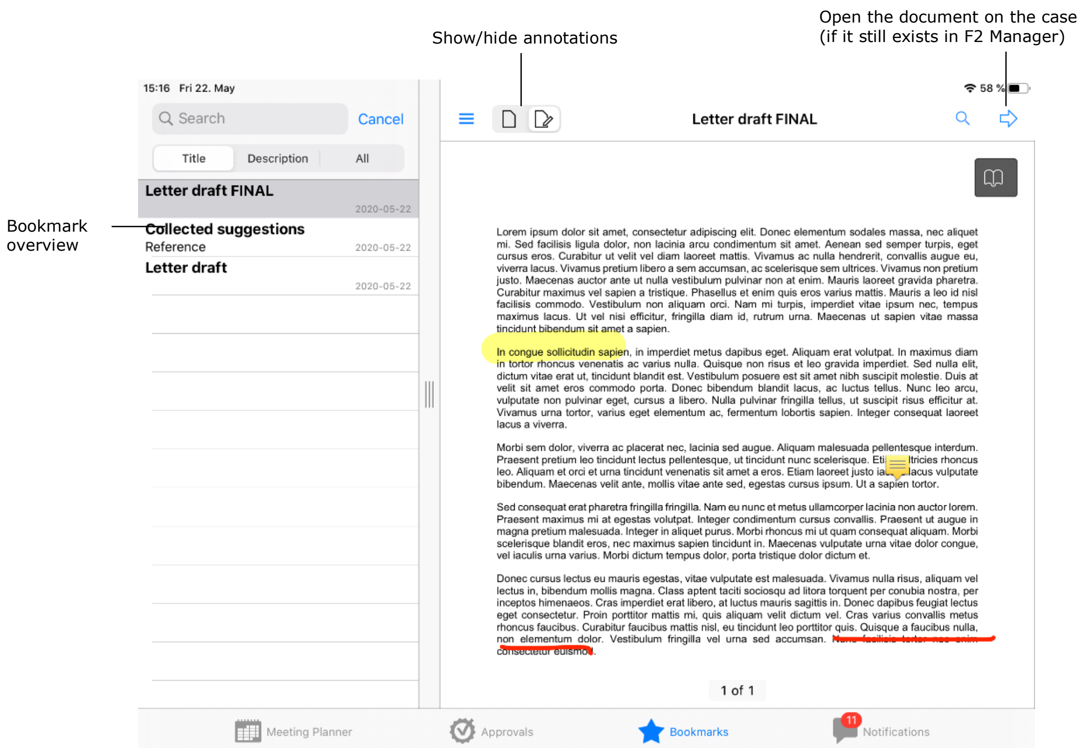

Figure 28: The bookmark list

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.

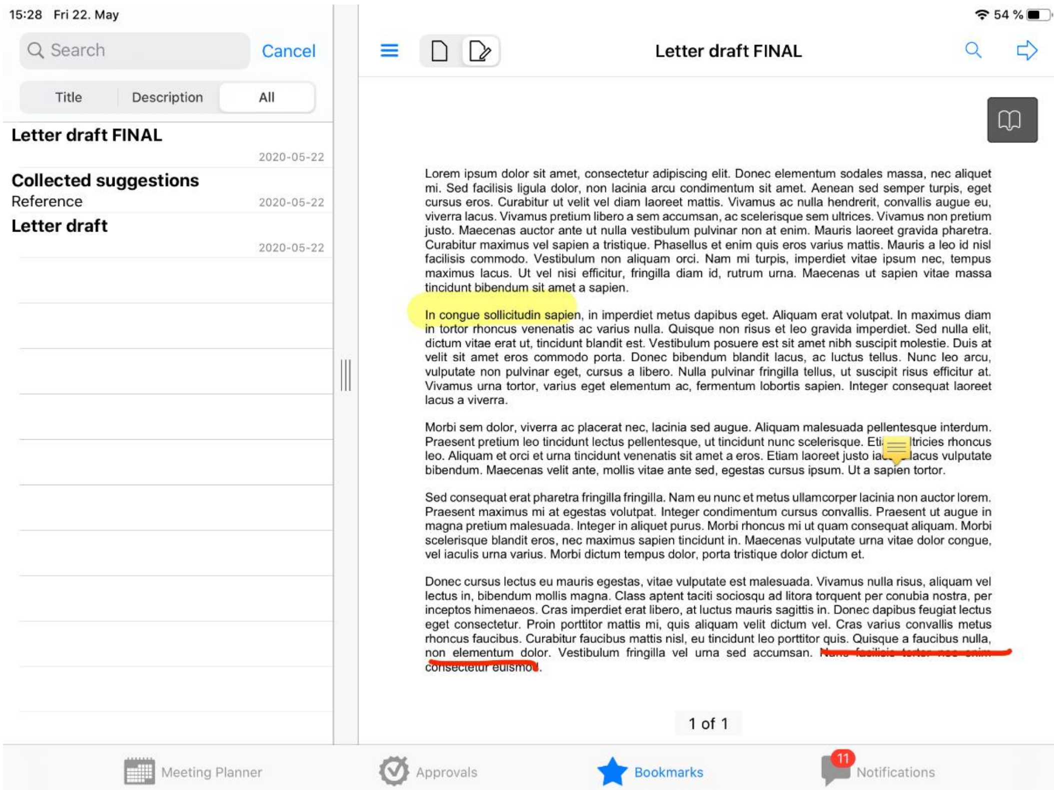

Figure 29: Searching in the bookmark list

To edit a bookmark, go to the bookmarked document in the meeting planner and tap the star icon. The bookmark's title, description and date can then be edited.

Figure 30: The star icon

Access the bookmarked document from the meeting planner, or select the bookmark in the bookmark list and tap the navigation icon in the upper right corner to navigate to the document in the meeting planner.

Figure 31: The navigation icon

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 the delete function.

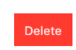

Figure 32: The delete function

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.

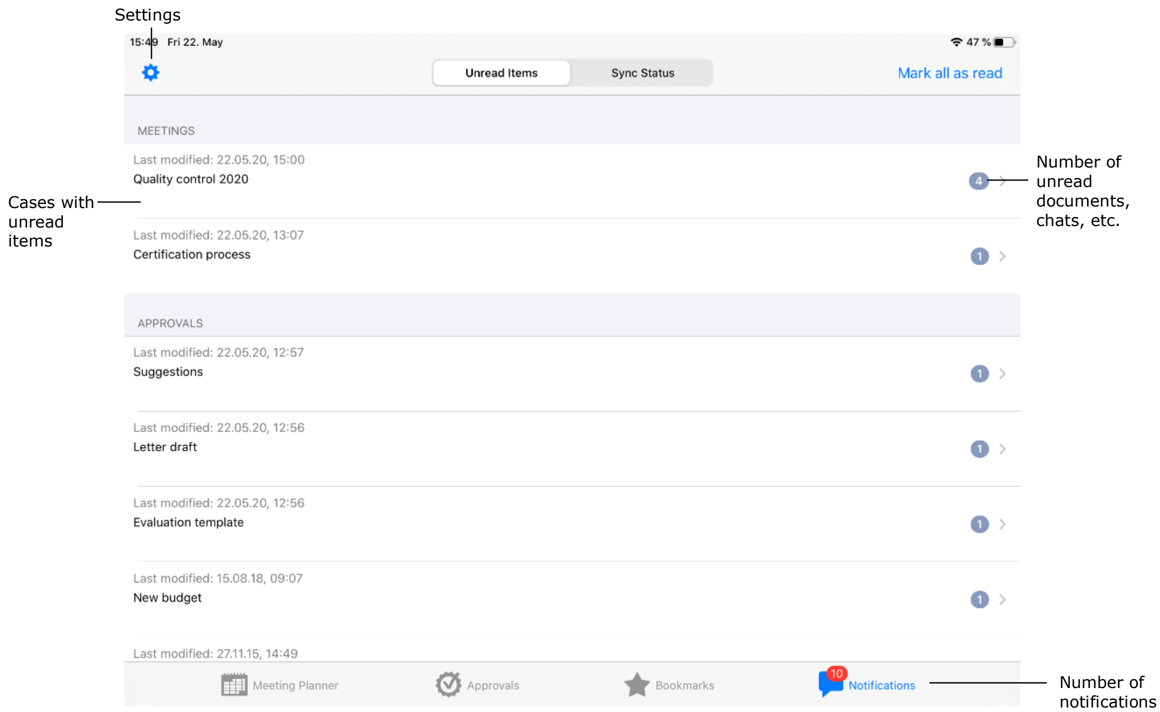

Figure 33: Unread notifications

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 the information icon and selecting **Drop action**. The action can be postponed by selecting **Try again later**.

Figure 34: The information icon

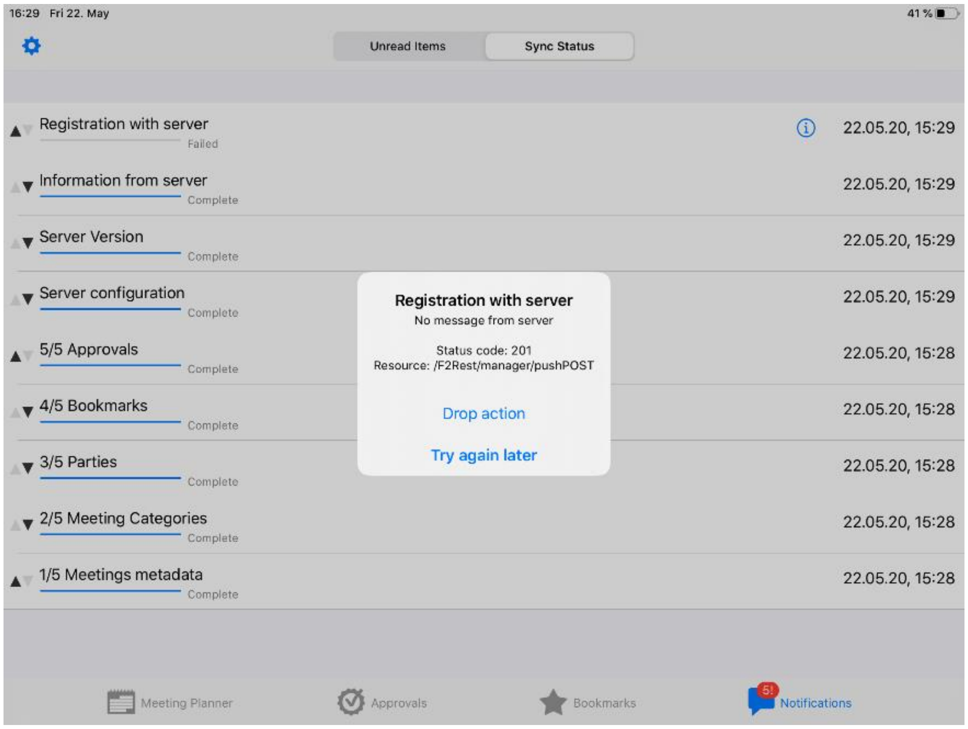

Figure 35: The synchronisation status

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.

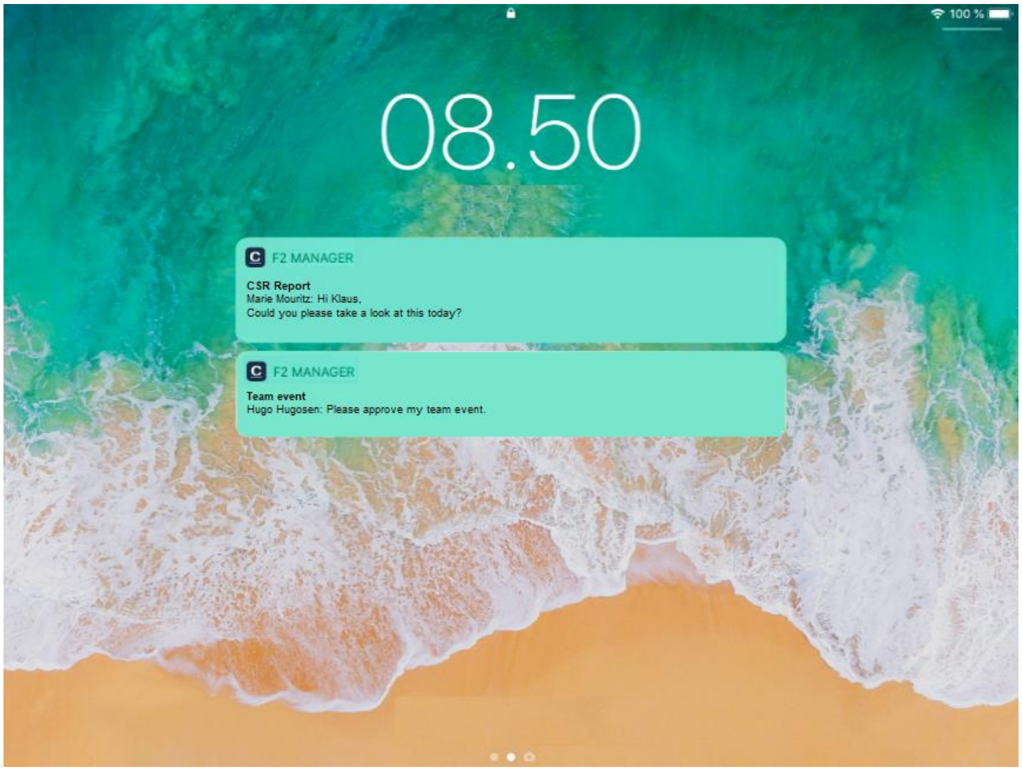

Figure 36: Push notifications on F2 Manager

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.

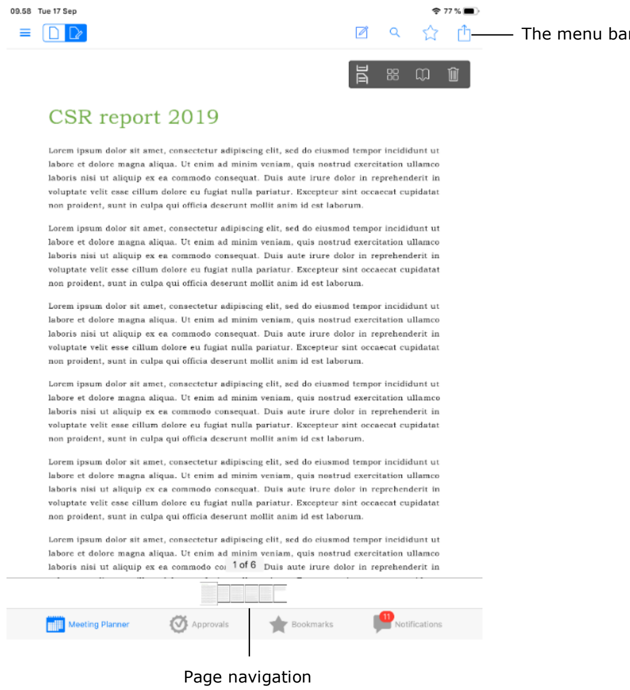

Figure 37: Page navigation

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.
- **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.

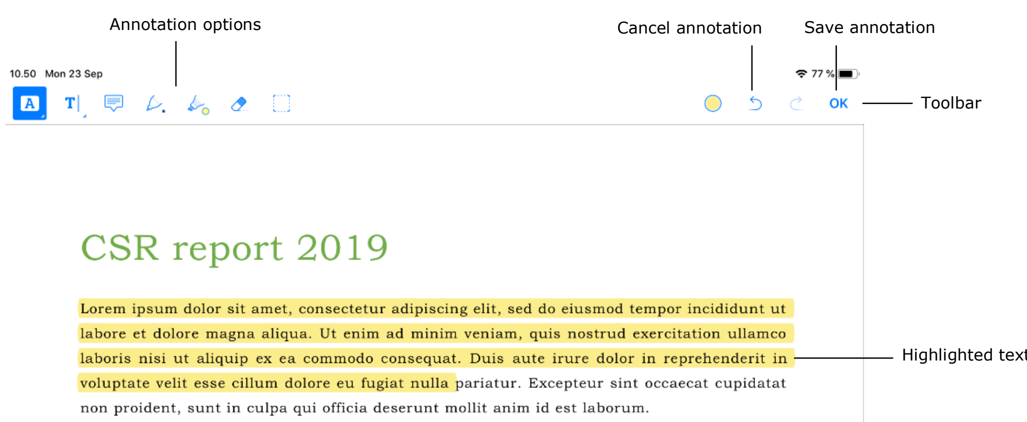

Figure 38: Annotating a document

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

Icon	Function	Description
	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:

Icon	Function	Description
		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.
	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 All | Annotated 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.

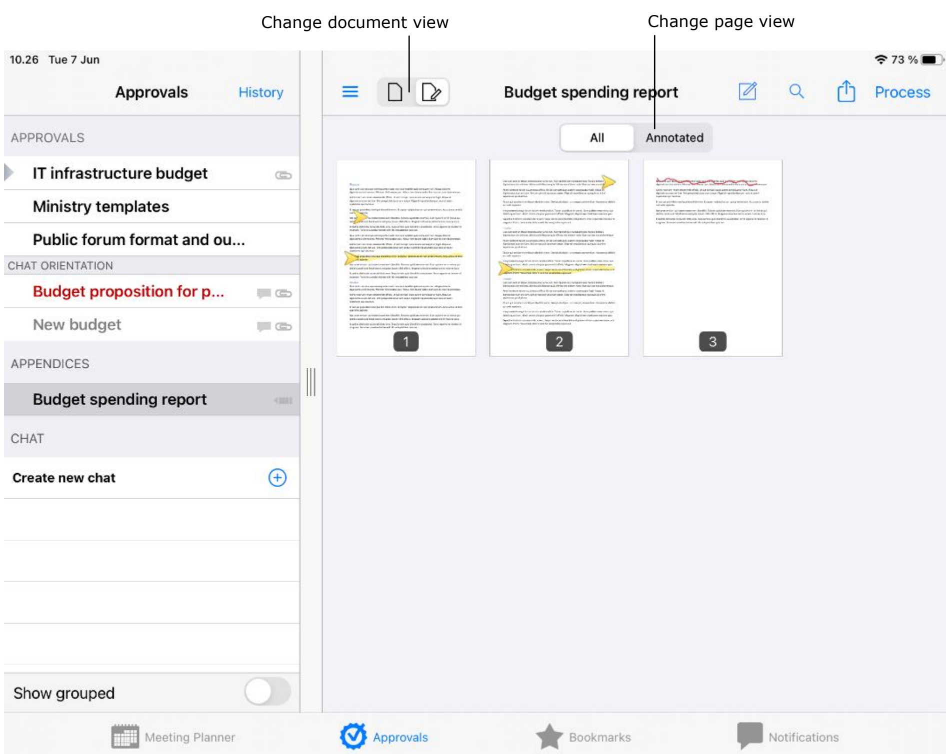

Figure 39: F2 Manager's miniature view of annotated documents

It is also possible to view a list of annotations including the creation time and the name of the creator. Tap the book icon to view the "Annotations" list. Swipe down on the list to show the search field.

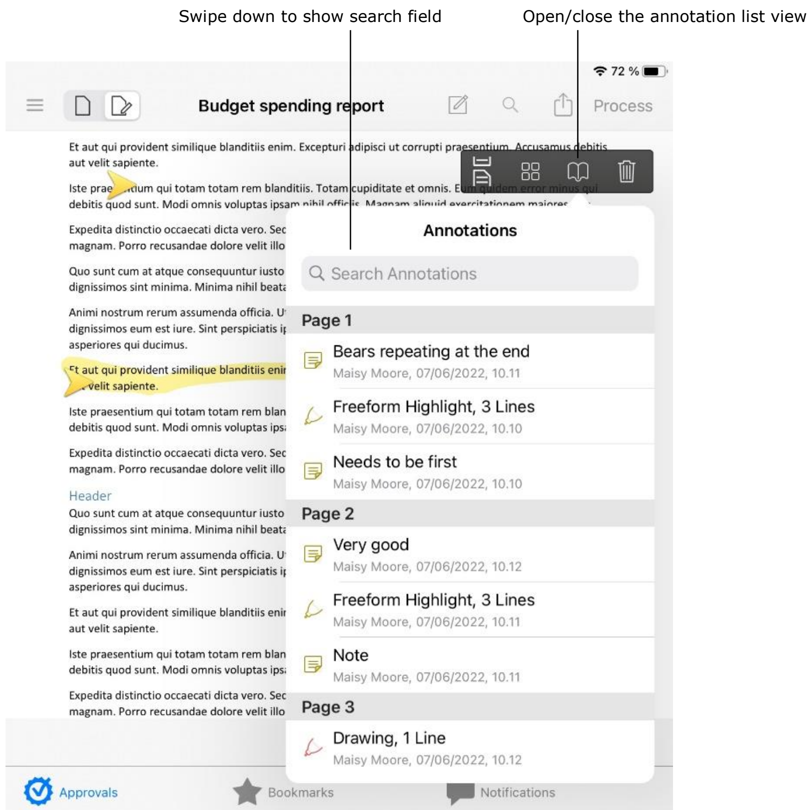

Figure 40: Show and search in annotations

Annotations can be sorted or deleted from the list when the document is in annotation mode. Tap **Edit** in the overview. It is then possible to change the annotation order or delete annotations as shown in the figure below. To delete a single annotation, swipe left on it and tap the **Delete** button.

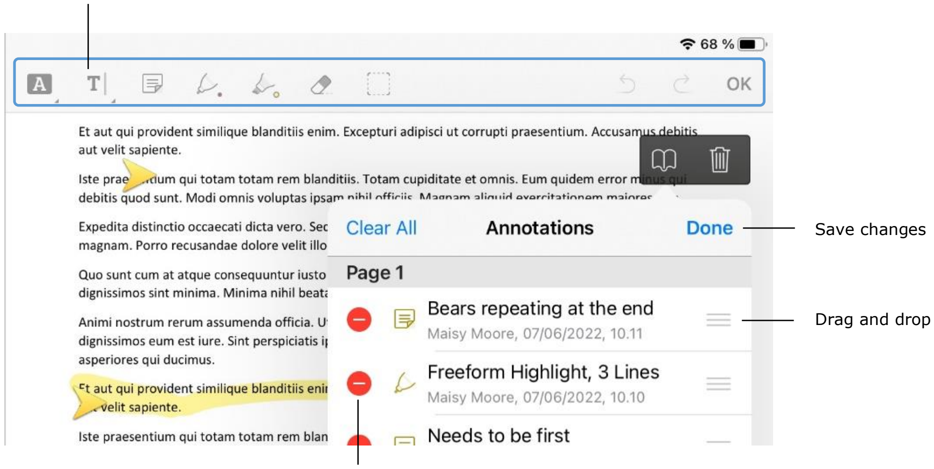

Figure 41: Annotation list view

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

It is possible to delete the entire annotation document in F2 Manager. This may be relevant if the original document was later updated or in connection with an approval process in which several approvers annotate and approve using F2 Manager. To ensure that the annotation document is associated with the current approver, any existing annotation documents should be deleted before the approver begins their work.

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.

Annotate a document in external application

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

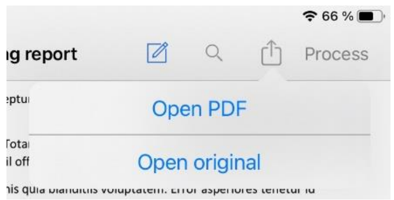

Figure 42: Document interaction options

> **Note**: The document's text formatting may change when the document is sent to a third-party app and then back to F2 Manager.

Print document

Documents can be printed from F2 Manager. To do this, tap the **Document interaction** button while the document is open.

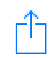

Figure 43: Document interaction

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.

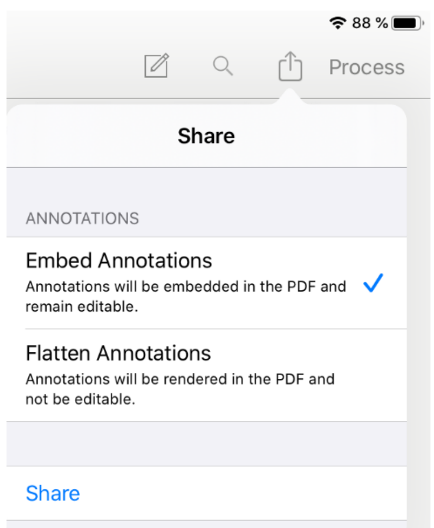

Figure 44: Document printing options

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

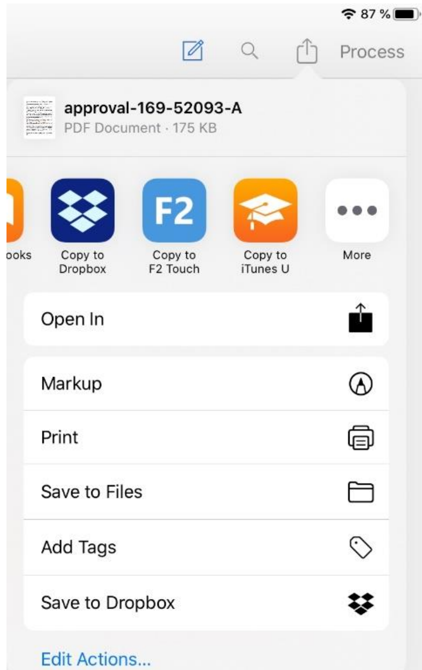

Figure 45: Tap "Print" to share the PDF with a printer

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 with the "On behalf of minister" standard role. This can also be applied to permanent secretaries using the "On behalf of permanent secretary" standard role.
- 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.
- It is possible to configure the approval processing options of an F2 Manager user with the gateway approval 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 the gateway approver, bypassing the gatekeeper.
- 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