F2

Request

Version 5.1

Table of contents

Reading guide

This manual is intended for existing, new and potential users of F2 Request. The manual contains a short introduction and a general description of the functionality and configuration of F2 Request.

Commands (i.e. the buttons you click on) are displayed in **Bold.** Any reference to a field or a list is displayed using "quotation marks".

If this document refers to other documentation, it is indicated in *Italics.*

The manual features a number of screenshots to help you easily find the described functions. Screenshots with lines and associated text show you where to click in F2. Areas in blue frame are identified as areas with several functions.

Enjoy.

Introduction to F2 Request

A request is a method to formally ask a user or a unit to carry out a task.

Three types of request can be made in F2.

1) **Regular requests**

   A regular request is a formalised way of requesting that a job be done within an authority.

2) **Group requests (add-on module)**

   Group requests are sent in one and the same F2 installation, but between different authorities.

3) **External requests (add-on module)**

   External requests offer the option of sending requests to a different F2-system, i.e. across installations.

This manual focuses on regular and group requests.

For further information regarding external requests, please refer to *F2 External requests – User manual.*

Active requests overview in F2 Desktop

In the daily work with F2 Desktop, it is possible to continuously send requests. Considering this, a list of requests currently active in F2 Desktop is a practical tool to have at your disposal, when it comes to keeping an overview.

List views

F2 comes with two standard request searches:

- "F2 Requests to unit"
- "F2 Requests from unit"

These standard searches are located under "Units searches" in the list to the left in the F2 Main window. In the example below, standard searches are displayed under "[Unit name]" under the "Unit searches" node. This may, however, vary from organisation to organisation.

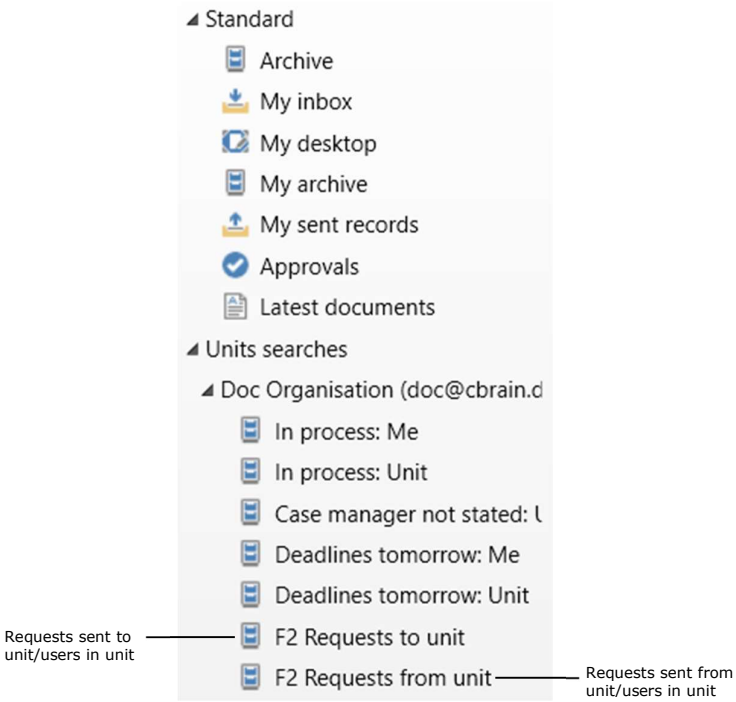

Figure 1: Standard searches for requests in list view

The requests for the unit are visible under the list "F2 Requests to unit". The list shows records that have requests linked to them and the request recipient is the user's current unit or a user within the unit.

A request is also displayed in the request recipient's personal inbox.

A number of columns are helpful when it comes to keeping track of requests, among others “Request recipient”, “Request executor” and “Request deadline”.

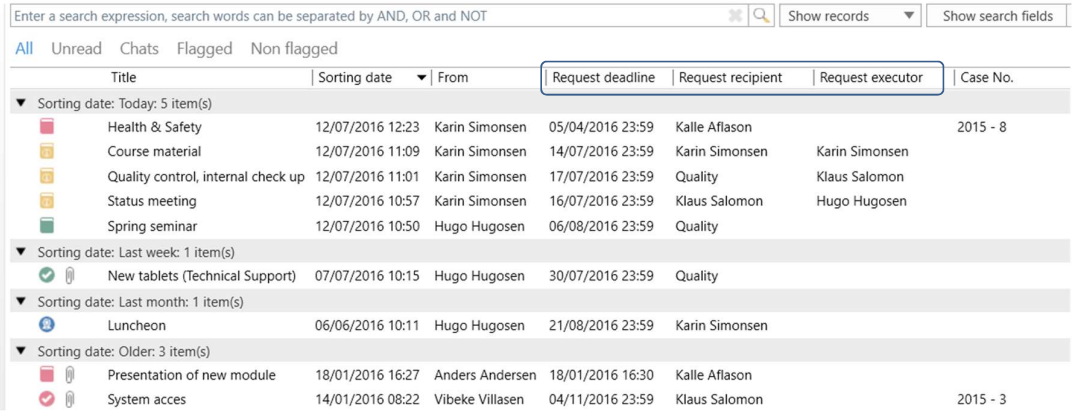

Figure 2: Columns for request searches in list view

Request icons

Depending on the deadline and/or status of the request, the request icon changes as shown in the table below.

Icon	Function
	Create new request.
	Request without deadline.
	Request with more than seven days until deadline.
	Request with less than seven days until deadline.
	Request with an exceeded deadline.
	*Changed request without deadline.
	*Changed request with more than seven days until deadline.
	*Changed request with less than seven days until deadline.

Icon	Function
	*Changed request with exceeded deadline
	Executed request
	Cancelled request
	Finalised request

*=I.e. changes to deadline, request type or description after the request has been send.

Regular requests

This section describes how a request is created, sent, received, executed and finalised.

> **Note**: Executing a request is not the same as finalising it.

Creating a request

Open a new request by clicking **New request** in the ribbon of the record to which you would like the request to be linked.

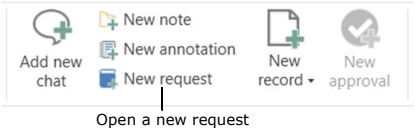

Figure 3: Opening a new request

Clicking **New request** opens a new request window. The only field that is filled out in advance is "Return to", in which the request creator is specified.

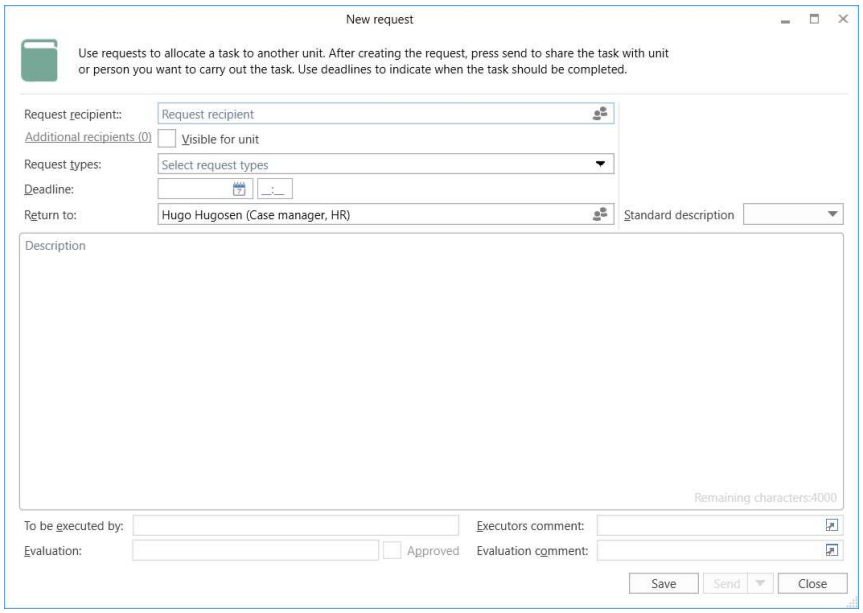

Figure 4: The request window

Before sending the request, the request creator can fill out the following fields.

Field	Purpose
"Request recipient"	The user receiving the request.

Field	Purpose
”Additional recipients”	Add other users here if the request has to be received by multiple users. In this case, F2 creates separate copies of the request on the record for each recipient. There is no practical or hierarchical difference between the recipients added in ”Request recipient” and those added in ”Additional recipients”.
”Visible for unit”	Activiate the checkbox to make the request visible to users in the request recipient’s unit. The function is activated once a request recipient is specified.
”Request types”	Clicking the down arrow presents you with a list of options to indicate the type of the request. The options provided depend on the configuration of F2. More than one option can be selected.
”Deadline”	Date (and optionally time) indicates when the request is to be executed. Enter the date and time in the field or click on the calendar icon. The deadline affects how and where the request appears in the request lists, thus facilitating traffic monitoring of requests within the organisation.
”Return to”	Shows where the request is sent after being executed. The request creator is automatically specified in this field when you open the request for the first time. If the request creator does not want to receive a request reply, a new user is added to the field before the request is sent.
”Description”	Text informing the request recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.
”Standard description”	Allows you to choose amongst text templates with predefined texts. Choosing a text template inserts the predefined text in the description field. **Note**: If text templates are not created, this field will not be visible.

If there are no text templates available or if the request creator wants to fill out the description field manually, enter the description of the request directly in the field.

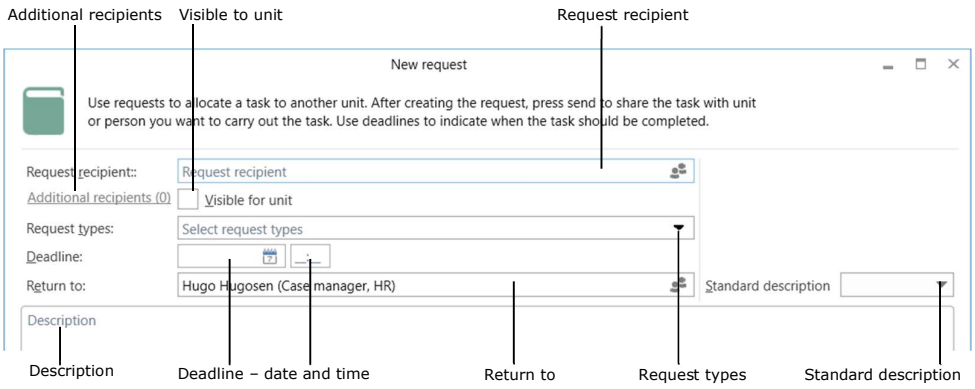

Figure 5: Fields that the request creator can fill out

Clicking **Save** creates the request. When you create a request, a history log of actions performed on the request appears in the upper right corner of the request. The history log is updated when the request is sent, changed, replied to etc.

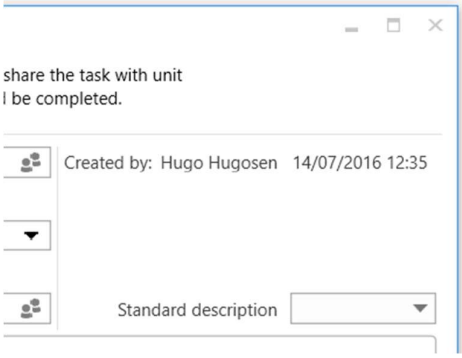

Figure 6: History log after a request is created by clicking Save

If you save a request with wrong information, you can delete it by clicking **Delete**. If you have already sent the request, it cannot be deleted, only cancelled. Cancel a request by clicking **Cancel request**. The function appears in the same place where the "Delete" function appears before sending the request.

Click **Send** and the request recipient will receive the request in his/her inbox in F2 and the users specified in "Additional recipients" will receive a copy of the request.

If you need to send the request immediately, clicking Save before sending is not necessary. The request is automatically saved when sent.

By default, the record creator is the user responsible for the record to which the request is linked. If the record creator clicks the down arrow in "Send", the request recipient can be set to the record responsible for the request record. This is done by clicking **Send and set record responsible** in the drop-down menu. This sends the request and sets the record responsible as request recipient.

Note: In order for the function "Send and set record responsible" to become active, the request needs to have been saved.

This way, the record creator passes the responsibility for not just the request but also for the entire record onto the request recipient.

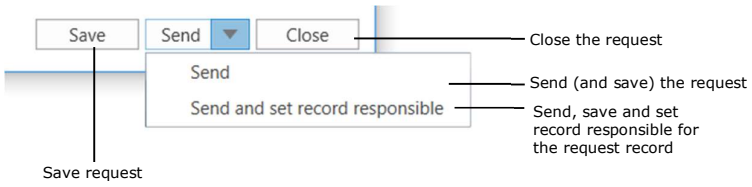

Figure 7: The request creator's options

When you create a request, it can be seen and accessed from the record to which it is linked. Open the request by clicking the request icon in the top of the document selector. A drop-down menu opens from which the request is selected.

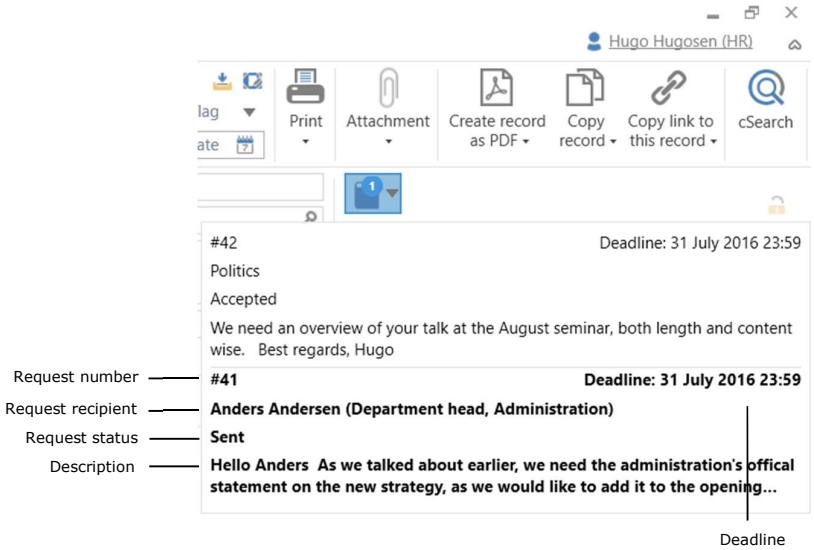

Figure 8: Request overview displayed by clicking the request icon in the record

For each request, the drop-down menu shows request number, deadline, request recipient(s), status, and the first part of the description. Request numbers are assigned automatically and chronologically. In this way, a request always receives the next vacant number.

Receiving and accepting a request

When a request creator sends a request, the request recipient receives it in his/her inbox.

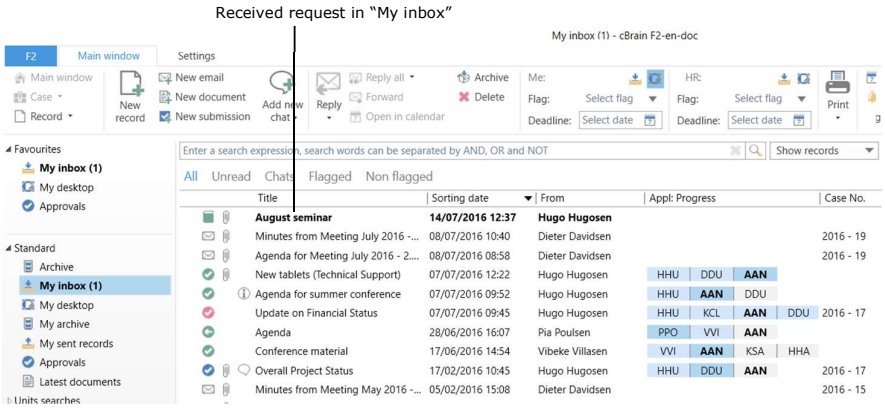

Figure 9: Received request in the request recipient's inbox

Double-click the record, and the unread request will open automatically.

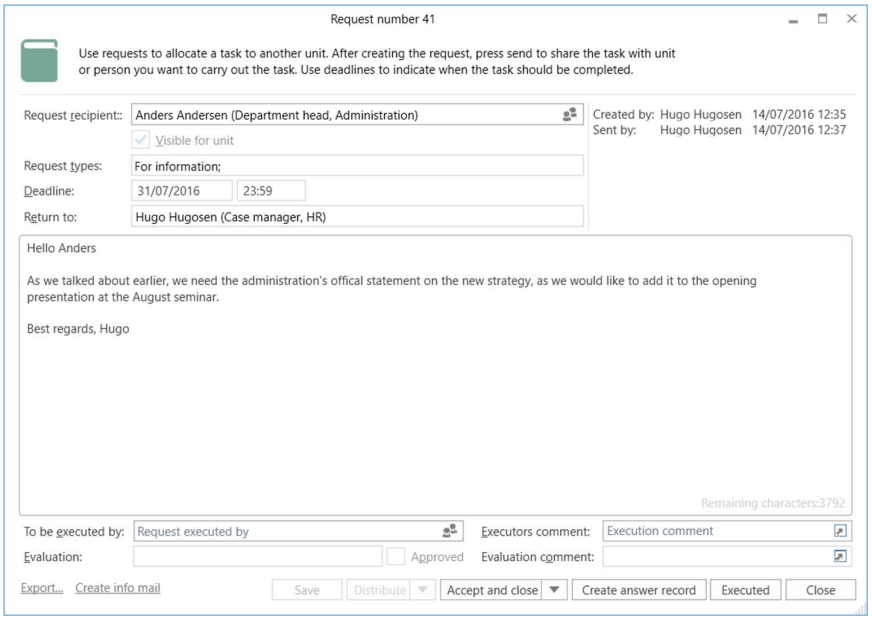

Figure 10: The request recipient's first view of the request window

After receiving the request, the request recipient has two choices. If the request recipient chooses to accept the request, click either **Accept and close** or the down arrow next to "Accept and close" and then **Accept** in the drop-down menu depending on whether the request is to be closed or not after accepting.

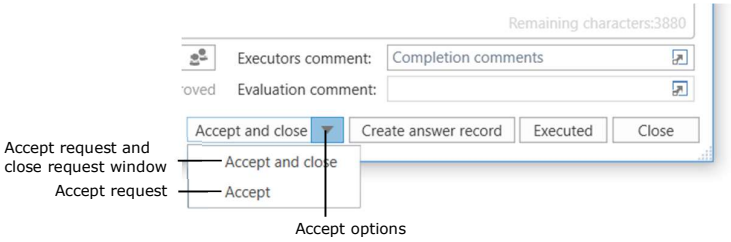

Figure 11: Options when accepting the request

If the request recipient wishes to accept the request but not one or more of the request conditions, the request recipient can contact the recipient creator, e.g. through a chat in the record to which the request is linked.

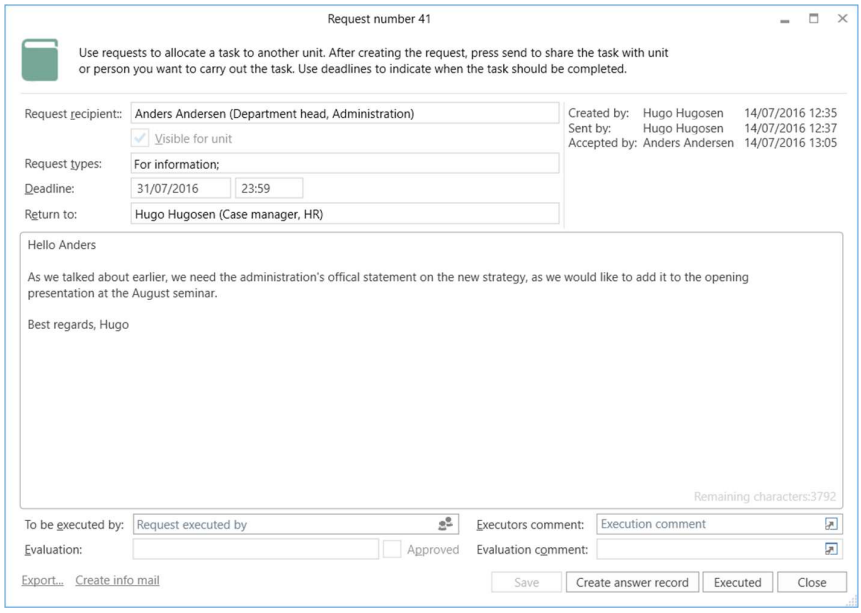

Figure 12: Accepted request

If the request recipient accepts the request, but another user will be executing it, the executing user's name is entered into the field "To be executed by". Click **Save** and the request will be sent to the new executor.

If the request recipient does not want to accept the request, a new request recipient is stated. Once this happens, the "Distribute" function is activated. Click **Distribute** to send the request to the user who will be executing the request.

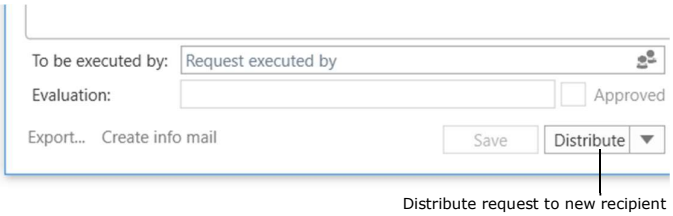

Figure 13: Changing request recipient activates Distribute

Replying to a request

A request is replied to in one of three ways:

1. Execute the request by replying to it directly in the request window.
2. Reply to the request by creating and sending an answer record, clicking **Create answer record** in the request window.

   Please note that it is possible to click **Create answer record** before accepting the request, because it can be practical to begin the reply even though the terms and conditions of the request have not yet been agreed upon.
3. Reply to the request by selecting a record and attaching it as a reply to the request.

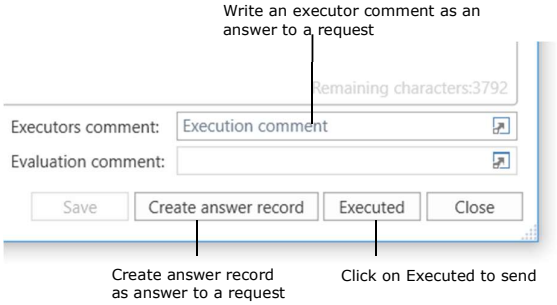

Figure 14: Reply options in the request window

Replying in the request window

Reply to the request in the request window by adding a reply in the field "Executors comment". Click **Executed** and the text entered in "Executors comment" will be used as reply to the request.

Creating an answer record

Reply to the request with an answer record by clicking **Create answer record**. Doing so displays the following dialogue.

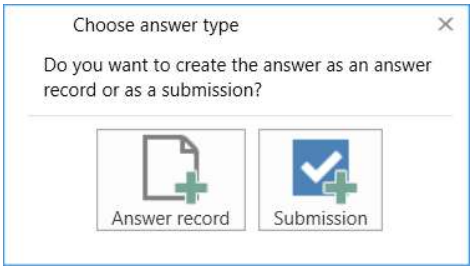

Figure 15: Dialogue when creating answer record

Note: Depending on the configuration, an answer record can be either a normal record or a submission. If both possibilities are allowed, select the type necessary. If only one is allowed, the above dialogue will not be displayed.

Selecting **Answer record** opens the dialogue "New record". The field "Title" automatically reads "Re: [The request record's title]".

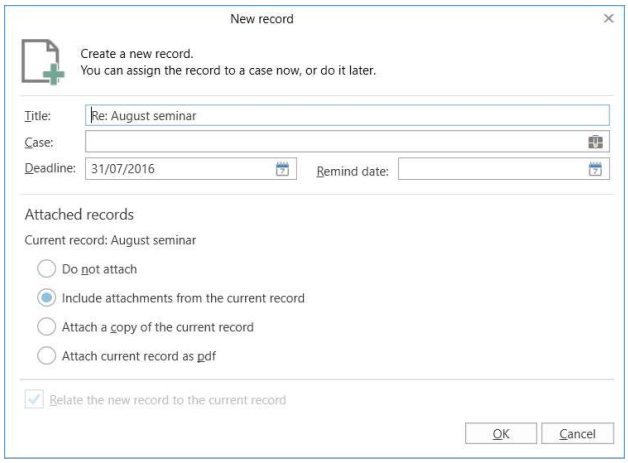

Figure 16: Creating an answer record

If the request record is linked to a case, F2 automatically suggests linking the answer record to the same case. The answer record will have the same deadline as the request, just as "Include attachments from the current record" is checked off. Click **OK** to create the answer record.

Navigation between the answer record and the record to which the request is linked is facilitated by a unique request icon in the answer record ribbon, which opens the record the request is linked to.

Figure 17: Navigation between answer record and request

The answer record is accessed in a similar way from the request itself. Click **the record ID link** to the right of the answer record item in the history log of the request to access the answer record.

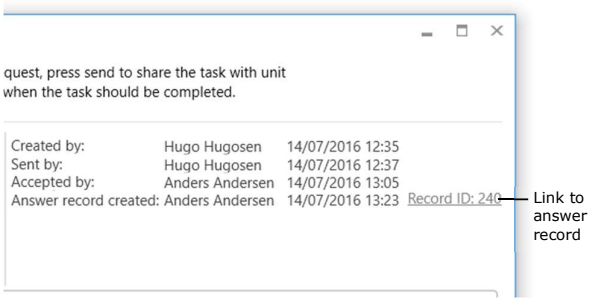

Figure 18: Link to the answer record of the request in the history log of the request

The answer record is automatically addressed to the user stated in the "Return to" field of the request. Clicking **Send** in the ribbon of the answer record is equivalent to executing the request in the request window, and both the answer record and the request are sent to the user in question.

The request has been executed and no longer appears in the list "F2 Requests to unit".

As mentioned above, the answer record can also be made as a submission. For further information on submissions, please refer to *F2 Submissions – User manual.*

Selecting a record as reply to a request

You can reply to a request by selecting an already existing record and attaching it as a reply. This is done by clicking **Select as answer record to a request** in the right-click menu of the record that you want to attach as a reply.

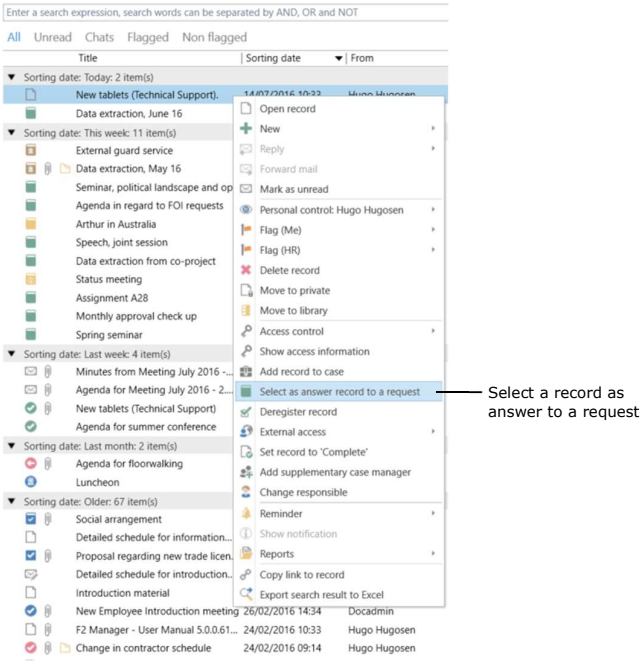

Figure 19: An already existing record is selected as an answer record to a request

Clicking **Select as answer record to a request** opens the dialogue "Select request" with a list of requests on which the user is either the request recipient or request executor. Choose the request from the list to which you want the record to be a reply and click **Attach as answer**.

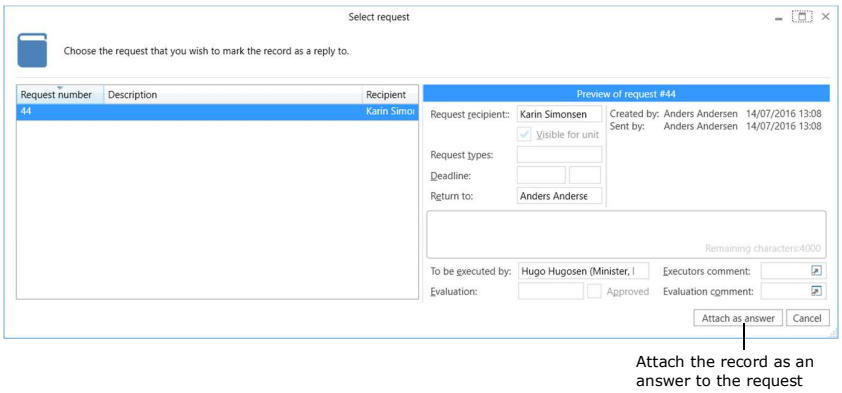

Figure 20: A record is attached as an answer to a request

Attaching a record as a reply to a request turns the record into an answer record, just as when an answer record is created from within the request window by clicking **Create answer record**.

There are benefits to not having to create an answer record to the request every time you have to reply to a request with an answer record. If a record with the information the request is asking for already exists, the approach here is much quicker and simpler.

To attach a record as a reply to a request, a number of conditions must be met:

- The user attaching the record as a reply must have full write access to the record.
- The user must have read access to the request as well as to the record to which the request is linked.
- The record must not already be attached as a reply to another request.
- The record must be of the type allowed by the F2 Request configuration (normal/submission).

Furthermore, please note:

- Users in the request creator's unit can only attach submissions and sent records. The same applies to users from "Return to" user's unit.
- Users in the recipient's unit as well as the executor can only attach submissions and unsent records as replies to a request.

Note: Once a record is attached to a request, the original date of creation appears in the history log of the request, as opposed to the date of attachment.

Finalising a request

The executed request is now visible in the "Return to" user's inbox.

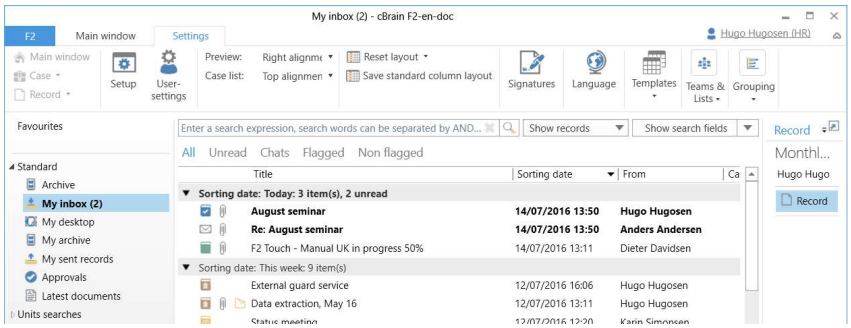

Figure 21: Executed request and answer record in the "Return to" user's inbox

The request is finalised by the user, it is returned to with an evaluation, an evaluation comment, an approval or a combination of these.

After handling the reply to the request, click **Set request to 'Finalised'** to finalise the request.

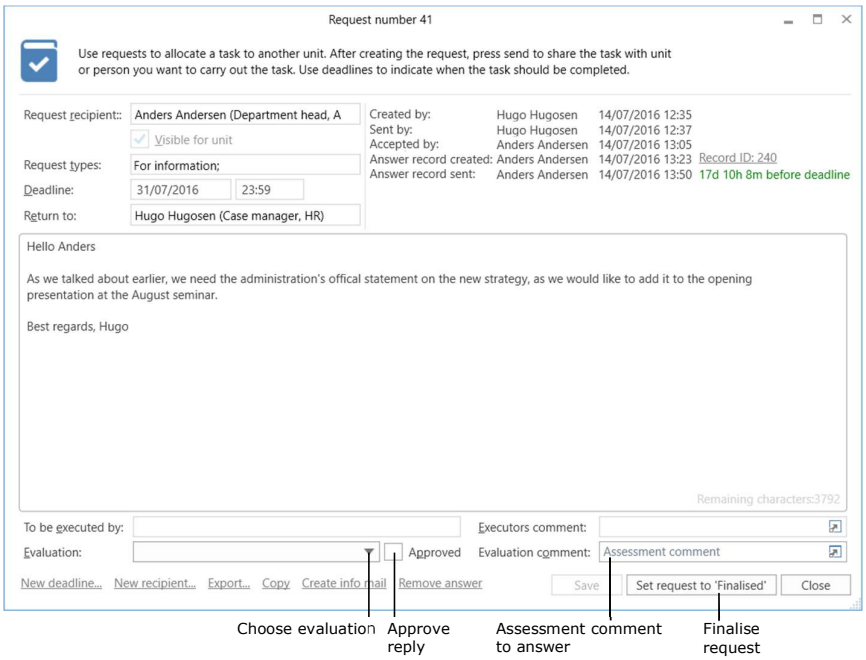

Figure 22: The request returned by the executor

Once the request is finalised, it will appear in the history log of the request.

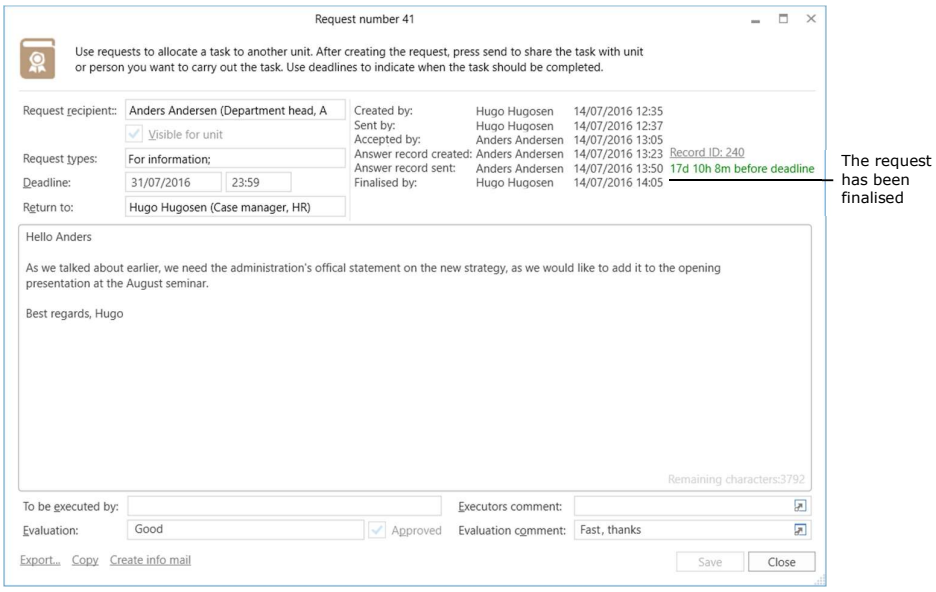

Figure 23: The finalised request

The approval status of the request becomes visible to the request recipient together with the evaluation and the evaluation comment, if any.

> **Note**: The request creator can always finalise the request. This changes the request icon to finalised .

> **Note**: It can be configured whether all users can finalise a request or only users in the request creator's unit.

The request is finalised and disappears from the list "F2 Requests from unit".

Finalised requests can still be viewed and accessed in F2 Desktop. To view all requests you have access to, run a search for requests in the Archive.

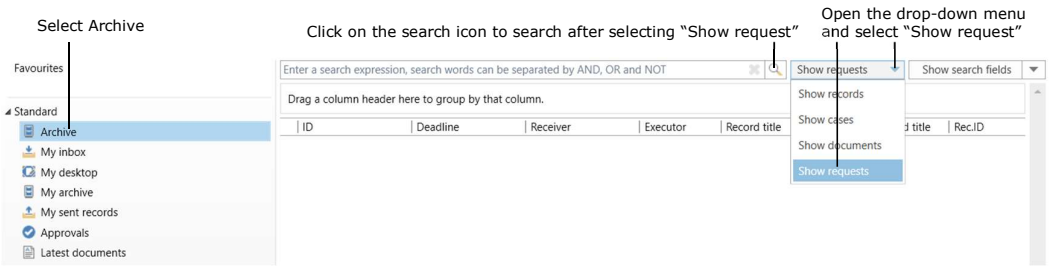

Figure 24: Search for requests in the Archive

If you run a search for requests in the Archive, F2 will display all the requests to which the user has access, including finalised requests.

Enter a search expression, search words can be separated by AND... | Show request | Show search fields

Record title	Record sender	Case No.	ID	Receiver	Deadline
RE: hiring of a new e...	Vibeke Villasen	2015 - 3	1	Hanne Winter	31/10/2015 23:59
RE: hiring of a new e...	Vibeke Villasen	2015 - 3	2	Hanne Winter	31/10/2015 23:59
RE: hiring of a new e...	Vibeke Villasen	2015 - 3	4	Hanne Winter	
request; new material	Hanne Winter		5	Lene Lang	15/01/2016 15:00
Wine tasting	Anders Andersen		8	Hans Hansen	18/01/2016 15:30
Social arrangement	Anders Andersen		9	Hanne Winter	19/01/2016 23:59
Social arrangement	Anders Andersen		10	Hans Hansen	19/01/2016 23:59
Spring seminar	Hugo Hugosen		16	Quality	06/08/2016 23:59
Luncheon	Hugo Hugosen		17	Karin Simonsen	21/08/2016 23:59
System acces	Vibeke Villasen	2015 - 3	18	Klaus Salomon	04/11/2016 23:59
New tablets (Technic...	Hugo Hugosen		19	Quality	30/07/2016 23:59
External guard service	Hugo Hugosen		39	Hugo Hugosen	
Data extraction, June...	Hugo Hugosen		40	Karin Simonsen	31/07/2016 23:59
August seminar	Hugo Hugosen		41	Anders Andersen	31/07/2016 23:59
August seminar	Hugo Hugosen		42	Politics	31/07/2016 23:59
Help on	Hugo Hugosen		45	Anders Andersen	29/07/2016 23:59
Help on	Hugo Hugosen		46	Anders Andersen	
Protocol setup	Hugo Hugosen		47	Hugo Hugosen	22/07/2016 23:59

Figure 25: Search results for requests in the Archive

Similarly, to the standard searches in list view, the search shows requests that are either for or from you or your unit.

Extra functions

In addition to the functions examined above, F2 Request offers a number of extra functions. These are practical tools to have at your disposal and this section is devoted to them.

The request window offers a number of extra functions at any given time. The functions available depend on the status of the request.

Function	Purpose
”Finalise now…”	Gives the request creator the option of finalising the request immediately, regardless of whether the request executor is done with the request or not.
”New deadline…”	Sets a new deadline for the request. The function is only active if the request recipient has accepted the request. If the deadline is changed by ”New deadline…” the request record appears as unread in the request recipient’s inbox together with the information that the deadline has been changed.
”New recipient…”	A new recipient can be added. An already given accept is cancelled.
”Export…”	The request is exported and saved as an XML-document on the user’s computer.
”Copy”	Creates a copy of the request in the same record. The next vacant request number is assigned to the request.

Function	Purpose
”Create info mail”	Creates an e-mail with the request attached, thus facilitating the orientation of a third party to the request. The third party has to be registered in the party register.
”Evaluate…”, ”Recipient evaluation” and ”Recipient evaluation comment”	A request recipient may click **Evaluate...** to evaluate the quality of the received request. It then becomes possible to select an evaluation from the drop-down menu “Recipient evaluation” and write a “Recipient evaluation comment”.
”Remove answer”	The function becomes visible once an answer record is created/attached to the request. Click **Remove answer...** to remove the answer record. The fact that an answer record was created will dissappear in the history log of the request.

Group requests

Unlike the regular requests group, requests are sent between parties and units on different authorities on the same F2 installation. For further information on installations and authorities please refer to *F2 Desktop – Administrator manual.*

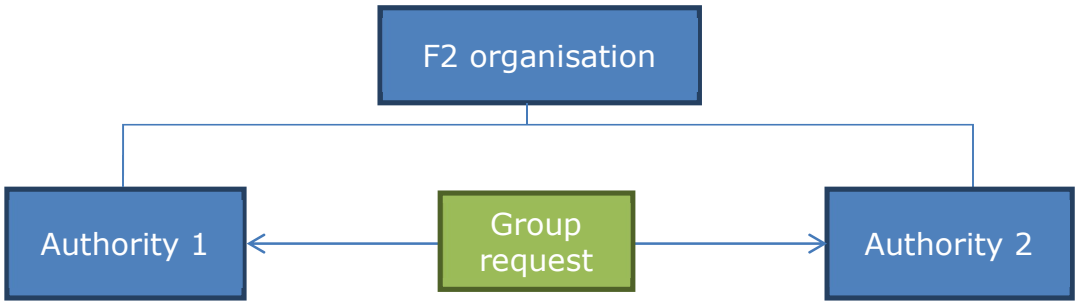

Figure 26: Group request between two authorities

Click the down arrow in **New request** and then **New group request** in the drop down menu.

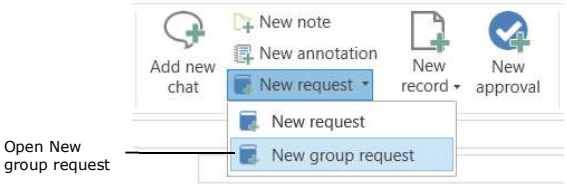

Figure 27: Open New group request

By and large, group requests are very similar to regular requests, differing nonetheless with regard to a few essentials.

- **Creation**

  A group request is created just like a regular request, by clicking **New request**/**New group request** in the ribbon of an already existing record/a newly created record. It is only possible to create a group request if the record is not in edit mode.

  If you create a group request on an already sent record, a new record with the title "Request [original record title]" is created.

  Attached files are copied to the newly created request record.

Note: A record can only have one group request linked to it.

- **Request creator**

  The request creator must have an e-mail address linked to him/her in order to be able to send a group request.

- **Request recipient**

  The request recipient must be a party in the other authority under the same F2 organisation and must also be associated with an e-mail address. Unlike regular requests, there can only be one recipient per group request.

- **Contributors**

  In addition to the request recipient, it is possible to have one or several contributors addressed on the request. A contributor is a user who contributes to the execution of the group request.

  A contributor receives the request record as an e-mail with a copy of the group request attached as a PDF file.

External info email

It is possible to register and email address to receive an external info email when a group request is sent to a unit, or when a group request to a unit is changed. This way, a third party can receive and respond to requests in Outlook etc.

To do this, an administrator sets up the third party to receive an external info email. For further information, please refer to *F2 Desktop – Administrator manual 5.1.*

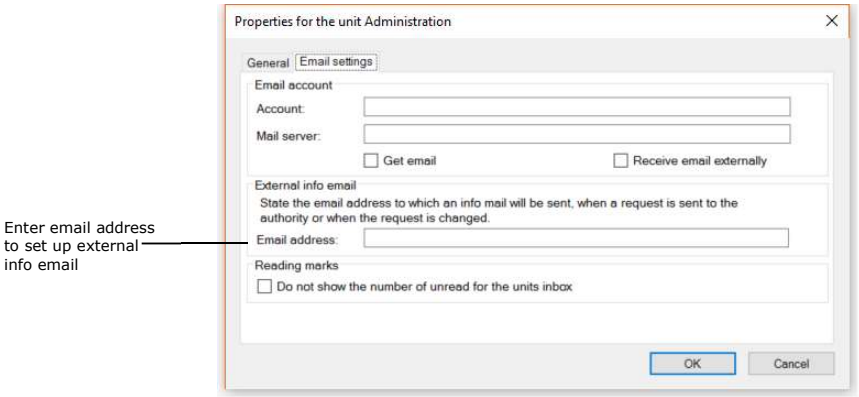

Figure 28: Administrator setting up external info email

Once a party has been set up to receive an external info email, the party will receive an email with the corresponding documents attached when a group request to the unit is either sent or changed.

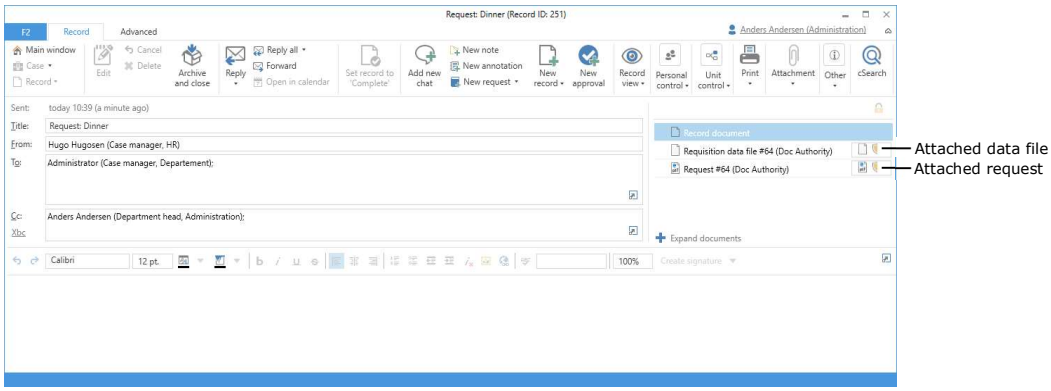

Figure 29: External info email with data file and request

The email also contains an attached data file. The data file allows F2 to recognise the group request as a reply, when it is sent back to the requesting authority by the executing authority.

Note: The data file must be attached to the reply to the group request in order for F2 to recognise it as a reply.

F2 cPort LIS Request

F2 cPort is a data extraction tool to be accessed by an administrator. With cPort as an extraction tool, an administrator can extract data and create reports from information accessible throughout F2.

F2 cPort LIS Request is an add-on module that builds on the F2 cPort module. cPort LIS Request is specially developed to handle a number of data extracts useful for generating reports based on request-related data in F2.

Extracts and reports from cPort provide information basis and measureable results, forming the foundation for optimisation of the specific authority's work procedures and processes.

cPort LIS Request comes with three groups of data for generating reports in connection with:

- Regular and group requests.
- Outgoing external requests.
- Incoming external requests.

The kind of data available in cPort LIS Request depends on the configuration of the authority's F2 Request, as well as on the request types used. For further information, please refer to *F2 cPort LIS Request*.

List of figures