cBRAIN

F2

FOI Request

Version 7

Table of contents

Reading guide

This manual is written for users of F2 FOI Request.

The manual contains a short introduction to F2 FOI Request and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

The manual is based on an F2 solution with all available add-on modules installed. Users may notice some differences between their own F2 client and the one presented here depending on the add-on modules included in their organisation's F2 solution.

In this manual, the names of commands are **bolded**. Commands are clickable features such as buttons. The names of fields and lists are placed in "quotation marks".

References to other sections within the document and references to other documentation are *italicised*.

We hope you enjoy using F2.

Introduction to F2 FOI Request

F2 FOI Request meets the need of being able to create a Freedom of Information request report and ensures an efficient administration of the records that are subject to this report.

F2 FOI Request makes it easier to create an FOI request report that contains materials from selected cases, records and documents. The user decides what to include or exclude from the report, while the F2 FOI Request module ensures a complete numbering of the records, so all involved participants can see whether something has been excluded.

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

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

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

For more information about legal considerations in connection with FOI requests to the Danish public authorities, see the document *The legal basis for cBrain's F2 FOI Request module*.

Create an FOI request

Before an FOI request can be generated, the records to be included must be located in F2. This can be done by performing a search, so they appear together as shown below. If the material is split between multiple cases, it is beneficial to use a folder when collecting the material.

Hold down the **Ctrl** key and click on the relevant records to select them. Afterwards, right-click on the selection. Select **Reports** to subsequently click on **Create FOI request** and finalise the action.
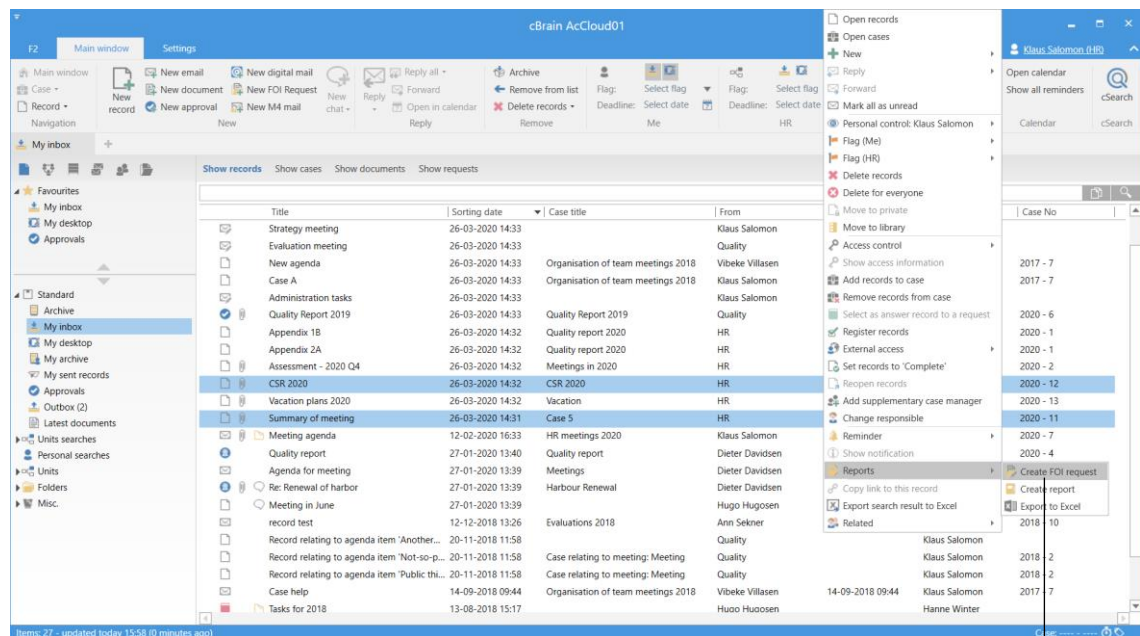
Create FOI request

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

Clicking **Create FOI request** opens a new dialogue. In this dialogue the title of the FOI request can be changed using the "Title" field.
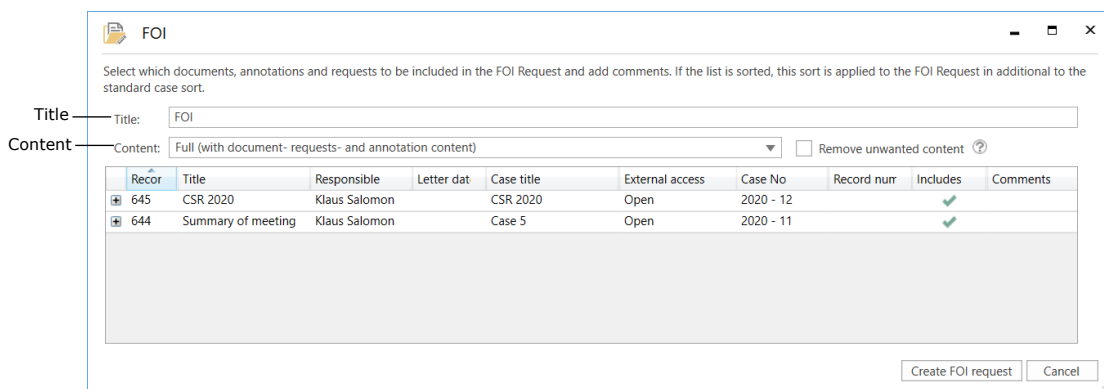
Figure 2: The "FOI" dialogue

Click on the drop-down menu in the "Content" field to open an overview of the detail levels available when generating an FOI request report.
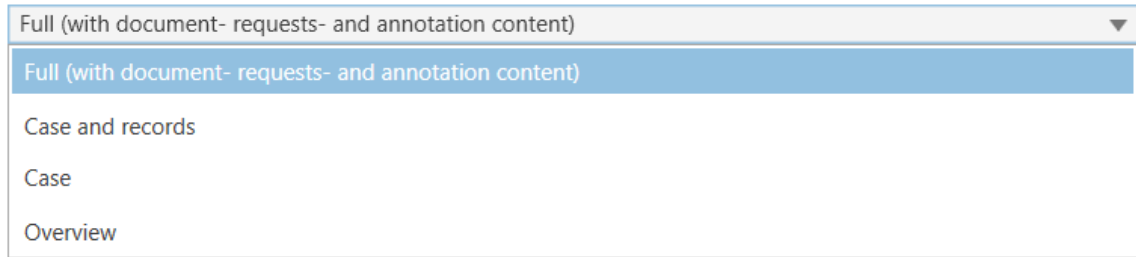
Full (with document- requests- and annotation content)	▼
Full (with document- requests- and annotation content)	
Case and records	
Case	
Overview	

Figure 3: Select the content for the FOI request

The following detail levels are available:

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

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

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

Adjust FOI request report

In the following subsections the different available options for adjusting the FOI request report in the "FOI" dialogue are elaborated. The detail level and content to be included in the FOI request report are selected in the dialogue.

Detail levels of the FOI request report

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

Full overview

To create a complete FOI request report, click on **Full (with document- requests- and annotation content)** in the "Content" field's drop-down menu in the "FOI" dialogue. This will show the selected records sorted by case.

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

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

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

Case and records

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

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

Case

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

Figure 6: Example of FOI request with "Case"

Overview

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

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

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

Figure 7: Example of FOI request with "Overview"

Filtering unwanted content

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

The filter is only applied if the "Remove unwanted content" box is ticked in the "FOI" dialogue. See the figure below.

Remove unwanted content from the FOI request   Show FOI request filter

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

Click on the **question mark icon** ⓘ to display an overview of what the filter will remove. See the example below.
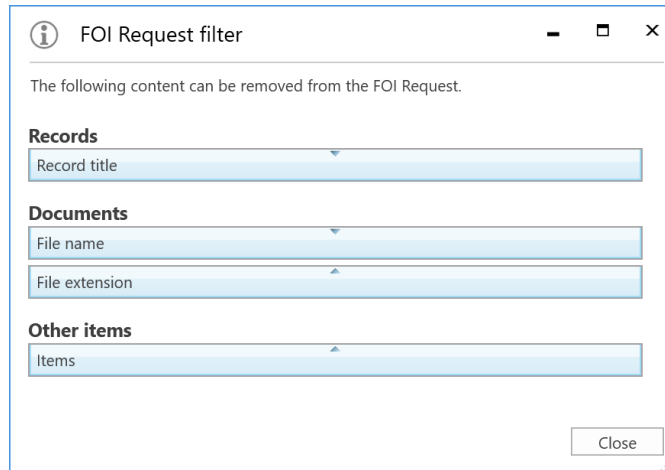
Figure 9: The FOI request filter

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

Exclude content

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

If any records, etc., should be excluded from the FOI request report, simply right-click on the unwanted record or document. Then, using the context menu, remove the check mark next to "Includes" by clicking on it. The unwanted record and/or document is then excluded from the FOI request report.
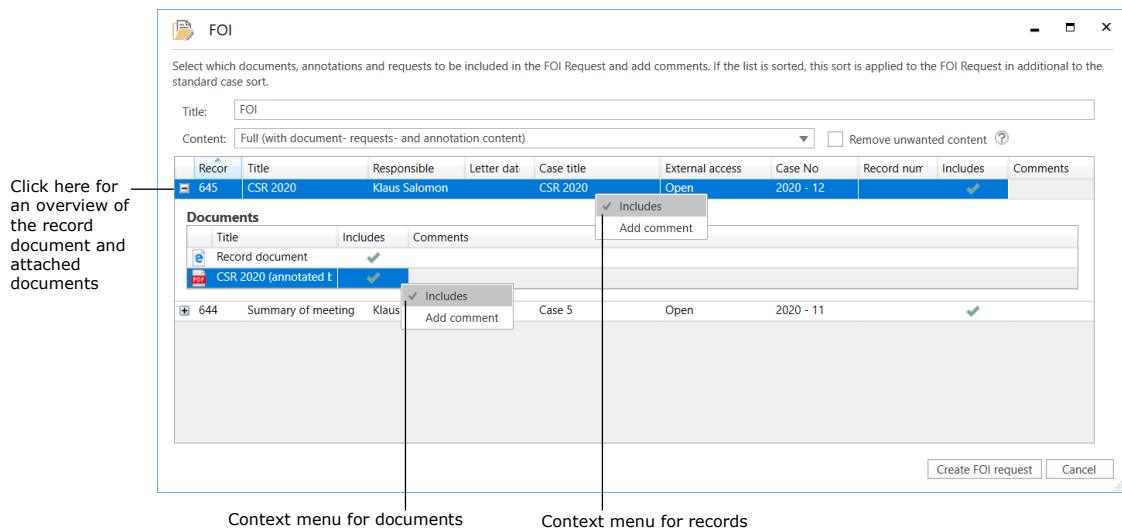

Figure 10: The context menu options for excluding records, etc. in the FOI request report

If the check mark is removed using the context menu, the green check mark in the "FOI" dialogue is also removed. See the figure below.
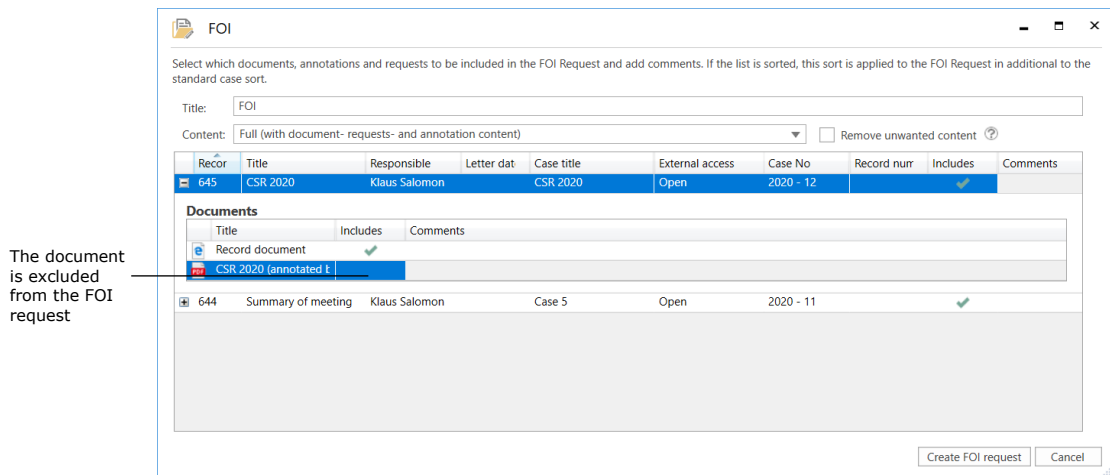
The document is excluded from the FOI request

Figure 11: The document is excluded from the FOI request report

Add comment

Comments can be added to the FOI request report by right-clicking on a record or document. The comment field can be used to state the reason for excluding a record, request and/or document. This can e.g. be necessary when dealing with sensitive personal data.

Add a comment by selecting the wanted record, request and/or document, right-clicking on it and then selecting **Add comment**.
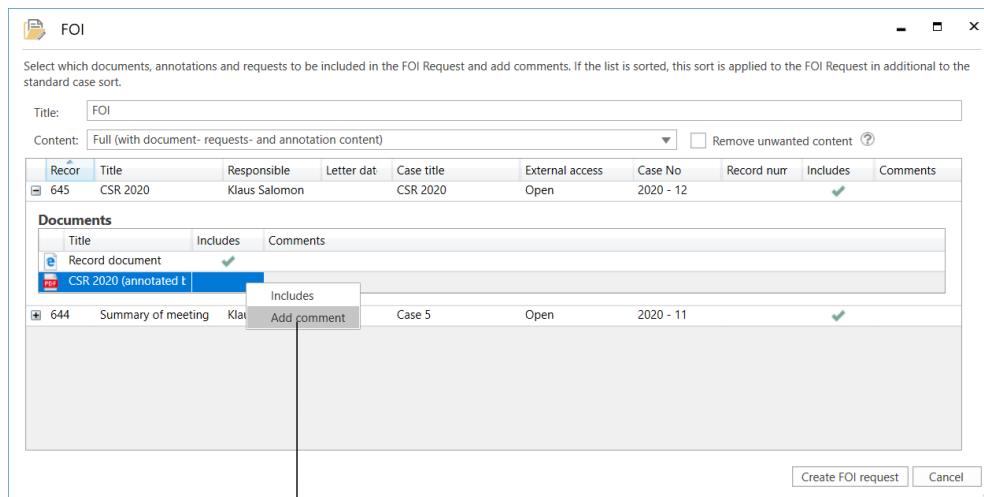
Add a comment to the document in the FOI request

Figure 12: Add a comment to the FOI request report

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

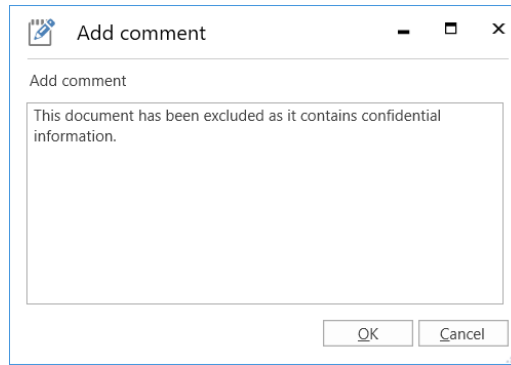**Figure 13: The "Add comment" dialogue**

After clicking on **OK** the comment is added and appears under the comment field in the record overview.

Comment added

Figure 14: Comment added in FOI request report

Delete or edit a comment

A comment that has been added can be deleted or edited before creating the FOI request report.

The following describes how to delete or edit the comment.

- In the context menu, click on **Add comment** on the relevant record, request or document.

- The dialogue with the comment that is to be deleted or edited opens up.

- Delete the entire comment, or edit the text.

- Complete by clicking on **OK**.

The final FOI request report

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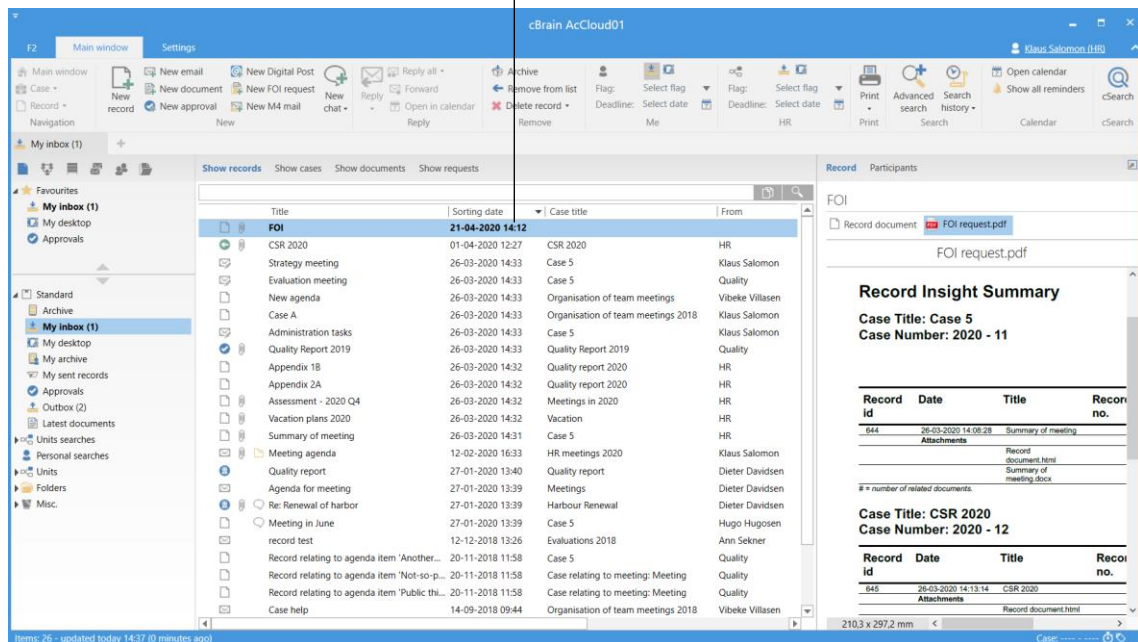

Figure 15: The FOI request report in "My inbox"

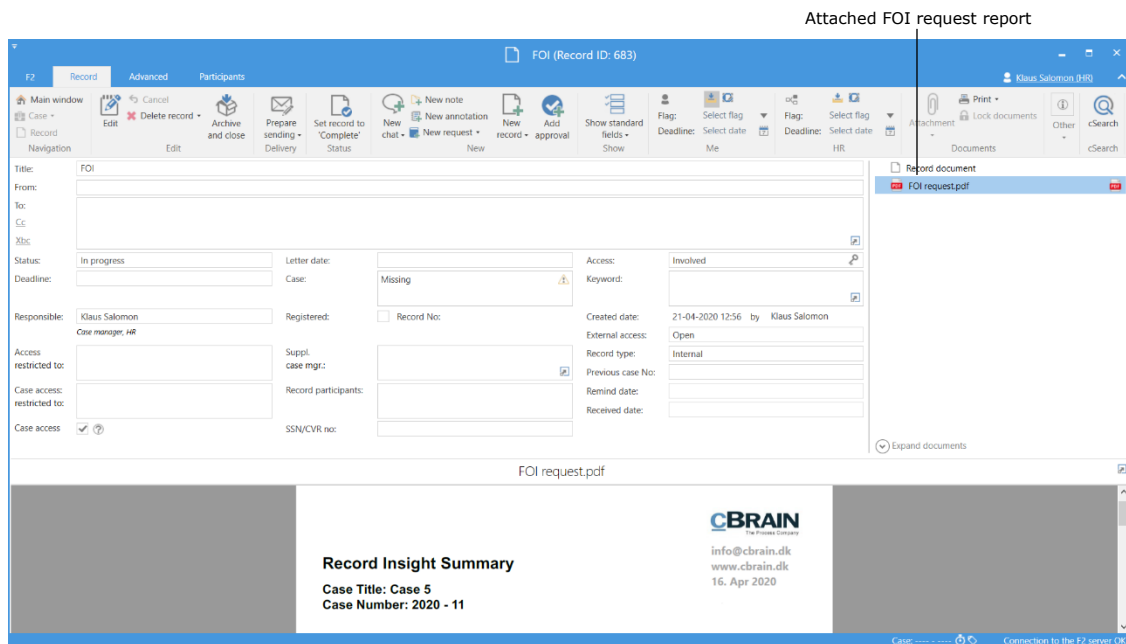The FOI request report is attached to the record. See the figure below.

Figure 16: A record containing a generated FOI request report

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

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

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

Managing record numbering in an FOI request

If an FOI request report has a gap in its sequential record numbering, the reason may be that a record has been deregistered and/or removed from the case in question.

Deregistration of records

A record is assigned a record number once it is attached to a case and the "Registered" field has been ticked.
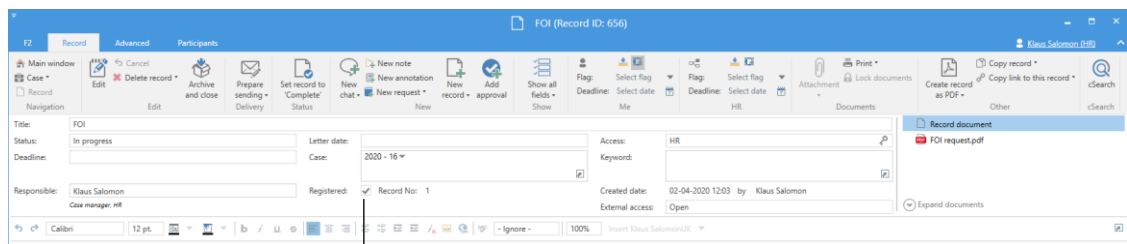
The "Registered" field and record no.

Figure 17: Register a record

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

If the record is registered again, it will be given a new record number – the next record number available and not the one it was originally given.

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

Find a record that is deregistered and removed from case

Records that have been deregistered and removed from a case can be found again using the case history. Click on **History** in the case window's ribbon.
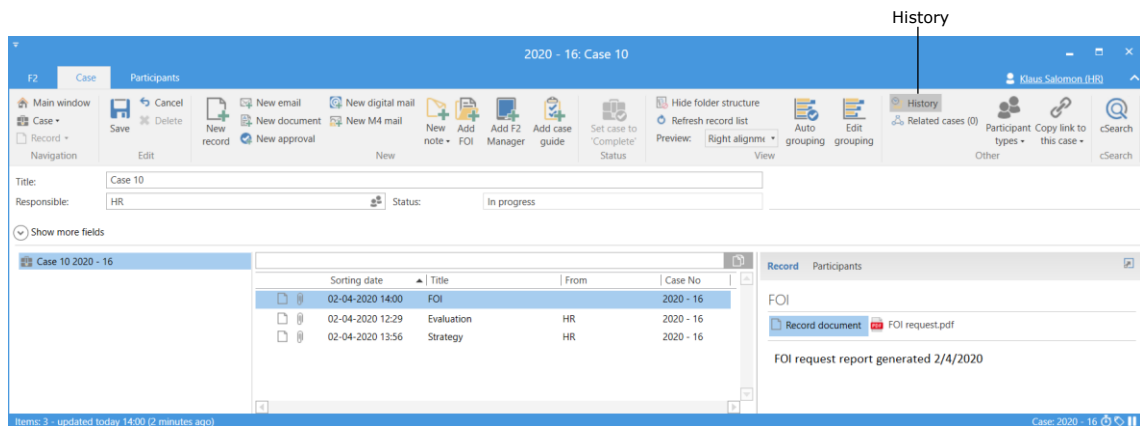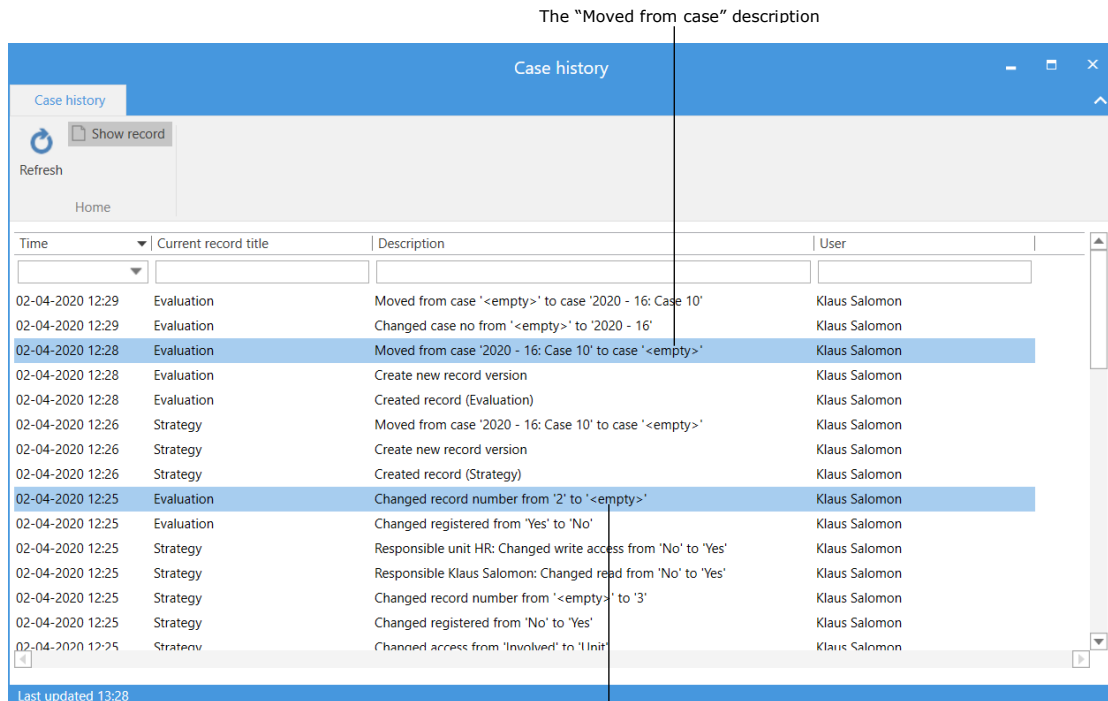

Figure 18: Access the case history from the case window

In the "History" dialogue, a log with all the actions made to the case can be seen. Using the "Description" column, it is possible to see if a record has been removed from the case. It is also possible to see if the record has been deregistered.

Figure 19: The "History" dialogue

Once the wanted record is found, it can be searched for in the "Archive" using the record's title.

F2 FOI Request configuration options

The configuration of F2 FOI Request is performed on an installation level and adjusted to fit the individual organisation and its work procedures. The following can be configured in cooperation with cBrain:

- Select a default setup for adjusting the FOI request report. The "FOI" dialogue can be assigned a specific standard for the entire F2 installation. This means that FOI request reports are generated using the same setup. However, users can still adjust FOI request reports themselves if necessary.

- Add a filter that automatically removes unwanted content before the FOI request report is generated. This can be records or files with a certain title.

- Define an empty record document in F2. An empty record document appears as an empty page when the FOI request report is generated. This can be avoided if the organisation defines the content of an empty record document. In that case, F2 automatically removes any empty pages from the FOI request report. This filter is invisible to individual users.

- Decide what text appears on the black bar found at the top of each appendix when the FOI request report is generated.

- Define a standard layout for the FOI request report including a standard front page.

List of figures