



F2 Desktop

Main window

Version 5.3

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Welcome to cBrain F2

cBrain F2 represents a new generation of Case Management System products and is centred around a fully integrated e-Government model. The model is based on case process support implemented via the actions and tasks performed by a case manager. This model is therefore called "action-oriented case management".

F2 is designed to accommodate the case managers need for a well-arranged and flexible tool that focuses on the user and where the need for registration is supported automatically as a by-product of the case managers work.

Manual reading instructions

This document is part of the F2 Desktop client manual and has been prepared as a guide to help you understand the functions and flows of F2.

The F2 Desktop client manual has been divided into seven sub-manuals that consist of:

1. [The main window](#)
2. Search functions
3. Working with records, cases and documents in the main window
4. Settings and Setup
5. Records and Communication
6. Working with cases
7. Management and Organisation

The sub-manual that you are currently reading is marked in blue.

In this document, the commands, i.e. the buttons to click on, are highlighted in **bold** while references to boxes or lists in F2 are in "quotation marks".

If this document contains references to other documentation where further information on a specific functionality or the like is provided, the name of the relevant document or section is in *italics*.

The document includes several screenshots to find the described functionality quickly and easily. Screenshots with lines and accompanying text indicate where to click in F2 while screenshots with a blue square designate an area with several functionalities.

All screenshots are taken in F2's recommended resolution. Though the functionalities are the same, users with a lower resolution might find that some icons look different than the ones in this document.

Add-on modules for F2

The document uses a F2 version in which all add-on modules are enabled. Depending on how many add-on modules each organization have included in their F2 solution, users may notice that their F2 looks different than the one discussed in this manual. In addition to the areas described in this document, F2 offers support for a number of processes and functions in the form of add-on modules. Please contact cBrain for further information.

Other documentation

There is also documentation relating both to F2 and to a wide range of technical areas.

Below is a list with a few examples:

- F2 Desktop - Administrator Handbook
- F2 Desktop - Installation manual
- F2 Desktop - Operations manual

Main window structure

The main menu of F2 opens when you log into F2. Here users keep track of their tasks, read received emails, chats and requests, search for specific records and cases, create records for internal or external communication etc. The users' lists and personal searches are also found here.

Below you can find F2's main window. This is the window you see once you log into F2.

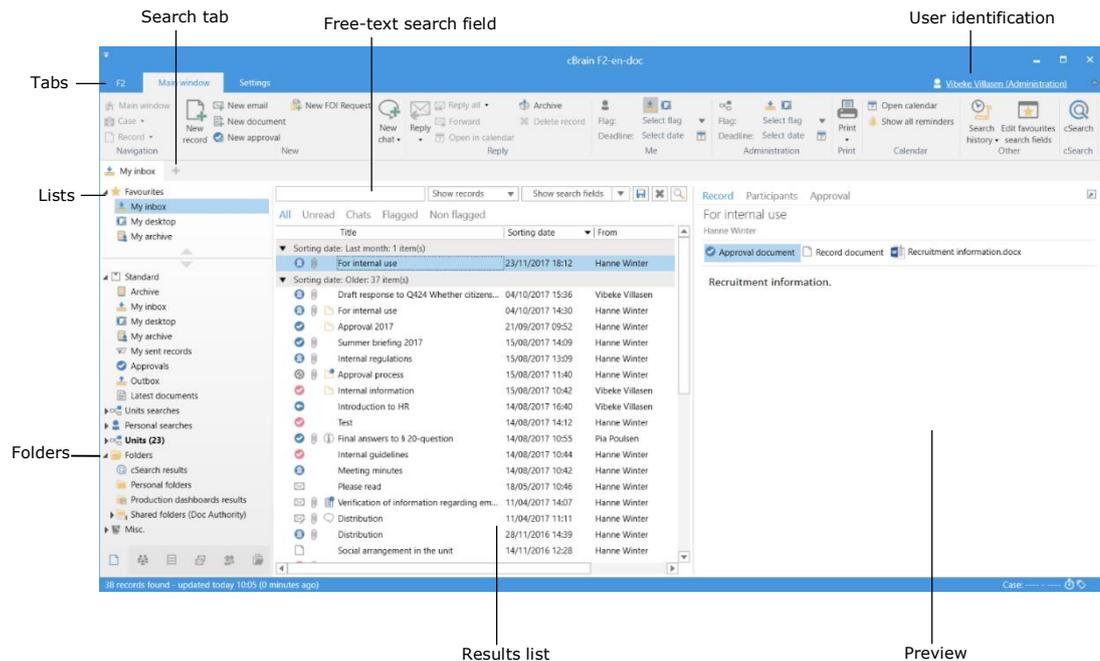


Figure 1: Main window structure

In the main window, the users organise their work and incoming communication is also received here. In the "Archive", it is possible to search for records and cases and create dynamic lists.

The layout resembles that of ordinary email programs. It is possible to preview records and email documents, thereby gaining an overview through the main window. At the same time, the main window gives the users' direct access to the "Archive" via the search function and the lists. It works as a system start page, where the users can find general settings, as well as their inbox, desktop and archive.

There are three tabs in the main window: "F2", "Main window", and "Settings". Each of these tabs has a ribbon consisting of several menu groups. It is here that the users find a number of menu items to navigate around with, perform actions from and manage the window layout.

Furthest to the right is the user identification, which shows, among other things, who the user is as well as which unit the user is associated with.

There are search tabs in the main window. These are used for performing searches and having multiple searches open simultaneously – read more in the section *Search tabs*.

The main window also includes a free-text search box for general data searches in the "Archive" or in one of the lists in the main window. It is possible to display additional search boxes.

Furthermore, there are several lists on the left side of the main window, i.e. "Favourites", where the user can attach frequently used lists or personal searches. The lists are used for displaying a particular subset of data in the "Archive".

The user can also create personal lists visible only to themselves. These personal lists are placed together with the default lists on the left side of the main window. It is from the F2 lists that the user navigates to the desired records, cases or documents by clicking on the relevant lists.

There are F2 folders under the lists. These folders are utilized by the user for manual organisation of records into private and shared folders.

Next to the F2 lists and folders, the user find F2's so-called results list. The results list shows the content of each list, i.e. the records, cases, and documents searched for.

If the user enables F2 preview, it is possible to view the content of individual records and documents selected from the results list in the PDF version. The preview can be displayed in a window next to or under the results list depending on each users' personal settings and setup.

At the bottom of the main window, it is possible to switch between displaying documents, meetings, other inboxes, and contacts (F2's participant register). The list of functions depends on the number of F2 add-on modules included in each F2 installation.

All information generated or received in F2 is stored in F2's central archive. All lists are therefore just searches in this archive based on formulated search phrases and metadata. This means that all the data is found in F2 only once and this is in the "Archive".

Introduction to the contents of each tab in the main window

The main window's different tabs are described below.

The F2 tab

There are several functions under the "F2" tab for general use of F2, including running F2 and F2 support:

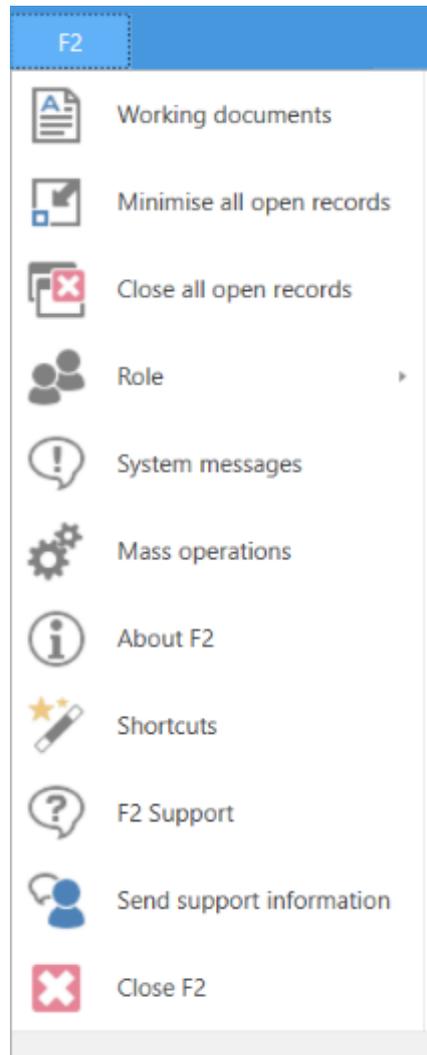


Figure 2: F2 menu

Working documents: Provides an overview of documents opened and modified from F2, where the change has not been saved in the database yet.

Minimise all open records.

Close all open records: Closes all open records. If a record is open and has had changes made to it, the dialogue "Save changes?" appears and asks if the changes should be saved. The record then closes automatically.

Role: If a user has several job roles in F2, including on-behalf-of rights, the user can switch between these roles here.

System messages: Provides an overview of previous and current system messages in F2.

Mass operations: Shows the last 20 mass operations executed by the user.

About F2: Information about version numbers etc. The F2 protocol association (normally an f2p:// link) is reproduced here. This way, it is ensured that an F2 link opens the right F2 desktop client when, for example, switching between F2 production, archive and/or test systems.

Shortcuts: Opens a window that displays the shortcuts possible to use in F2.

F2 Support: Directs the user to the home page specified in the installation as the support page of the organisation. Usually, this is a page on the intranet of the organisation.

Send support information: From here, information is sent directly to F2 support.

Close F2: Shuts down F2.

Main window

All relevant functions for communication, processing, and management records can be found in the ribbon in the “Main window” tab.

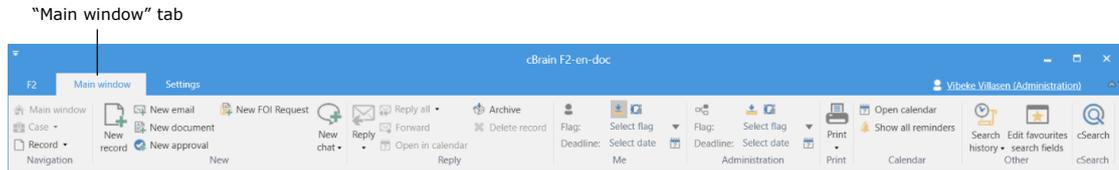


Figure 3: The main window ribbon

The individual menu items in the main menu ribbon are described in more detail partly in the manual *F2 Desktop - Records and communication* and partly in the manual *F2 Desktop – Working with cases*.

Settings

The third tab in the main window is “Settings”. Using the functions in “Settings”, the users can adapt F2 according to their individual preferences both in relation to preview methods and to determine how a number of actions should be handled by F2. Learn more about this in the manual *F2 Desktop – Settings and Setup*.

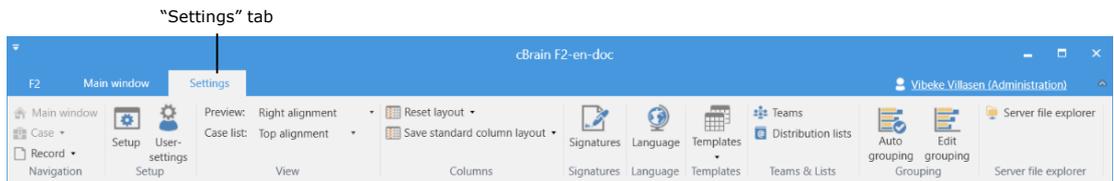


Figure 4: The ribbon of the “Settings” tab

User identification and fast role change

The user identification is found in the top right corner of F2's main window. The function "Fast role change" (add-on module) is also found here.

The identification shows who is logged into F2 as well as the current user's unit. In the screenshot to the right, it is possible to see that it is Vibeke Villasen from Administration who is logged into F2.

Read more about this in *F2 Shared Emailboxes – User manual*.

Note: The corresponding user identification and "Fast role change" function can also be found in the record and case window.

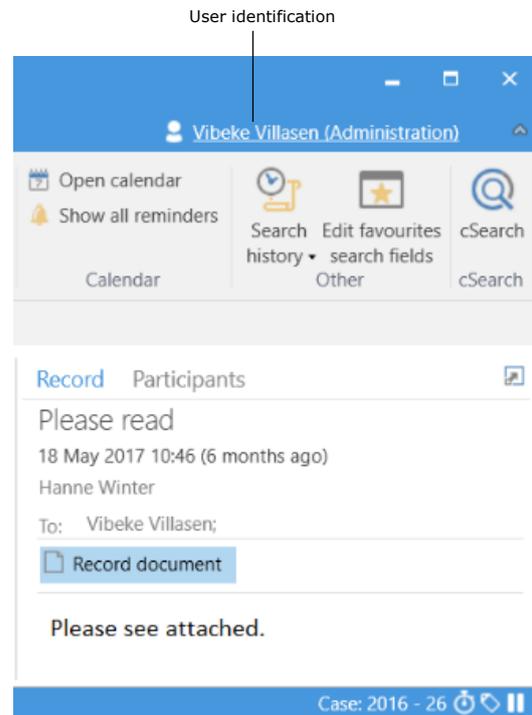


Figure 5: User identification

Search tabs

As described in the section *Main window structure*, the main window contains search tabs, which are used for executing several searches at the same time. This is particularly useful when, for example, performing related searches.

New search tabs can be opened by clicking on  or by using the shortcut **Ctrl + T**.

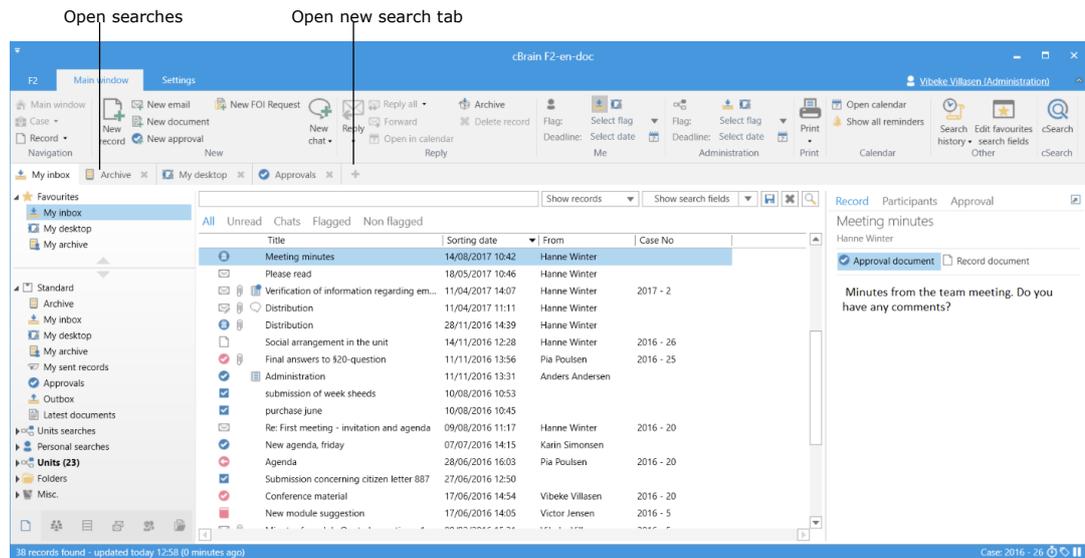


Figure 6: Search tabs in the main window

All search tabs will close when switching from one user to another. However, if the user switches roles the search tabs will remain open.

Note: The number of open search tabs increases the memory usage in the F2 Desktop client. There is a warning in case the memory usage is getting too high.

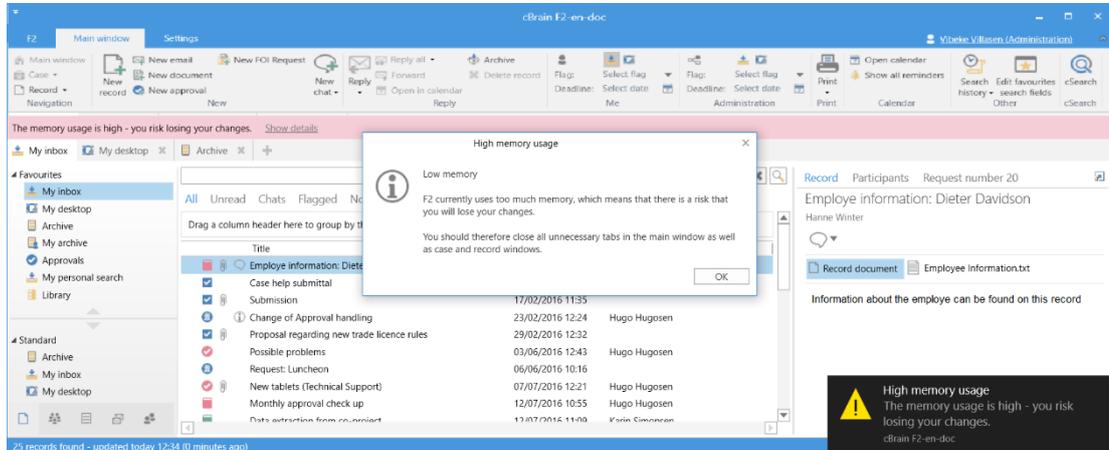


Figure 7: Warnings in case of high memory usage

Lists and folders in F2

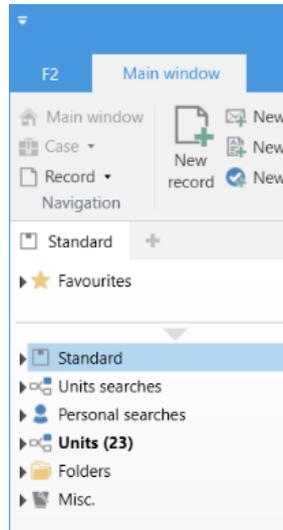


Figure 8: Groups of lists

F2's standard lists and the personal lists each user has defined are located on the left side of the main window.

As evident from the screenshot on the next page, the list view of the main window is divided into several sub-areas.

Note: The division may vary from installation to installation.

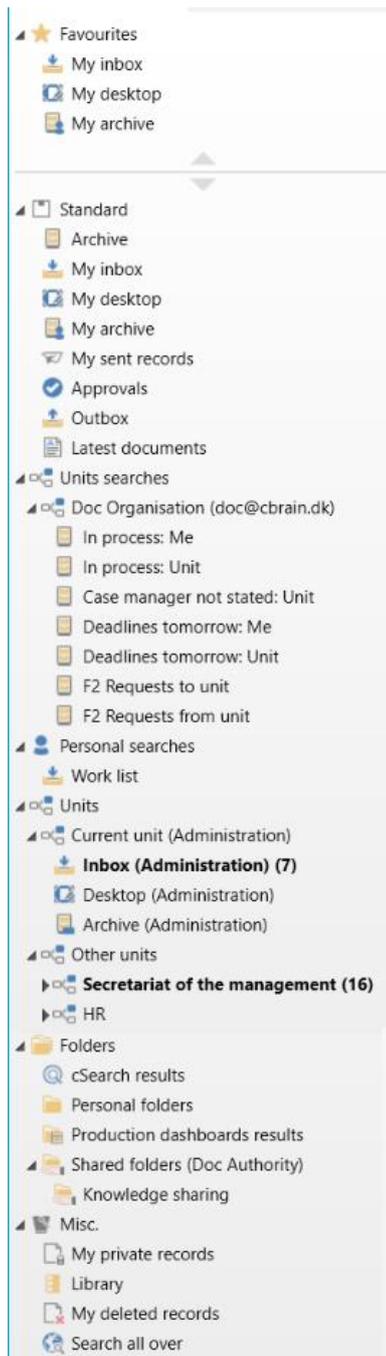


Figure 9: List view

“Favourites”: This is an area where each user can add frequently used lists. These can consist of fixed lists or lists generated by the user. It is also possible to add cases.

“Standard”: F2 comes pre-configured with several default lists. As a minimum, it will always include the lists “My inbox”, “My desktop”, “My archive”, “My sent records”, “Outbox” and “Latest documents”.

“Units searches”: The same lists as the ones under “Standard” are included here but they belong to the employee's unit. The number of lists in this tab is unlimited and is adapted according to each authority. In F2 terms, F2 is configured with this authority.

“Personal searches”: Here F2 collects all the lists generated by the user.

“Units”: Here you can see the unit lists (i.e. the unit’s inbox, desktop and archive) for all the units in which a user has job roles. In other words, a user with a job role in multiple units can see two nodes:

- 1) **“Current unit”:** The unit in which the user is currently logged in as.
- 2) **“Other units”:** All other units, in which the user has job roles, but is currently not logged in as. They are collected under this node.

Note: If a user only has job roles in one unit, only the node "Current unit" will be displayed.

“Folders”: Under “Folders” the user can find results from cSearch (add-on module), “Personal folders”, as known from Outlook, “Production dashboards results” (add-on module), and “Shared folders”, which are visible to everyone.

“Misc.”: Here the user can find documents, deleted records and a common library.

Predefined lists in F2

F2 is installed with a set of predefined lists located on the left side of the main window. These lists are configured in connection with the setup of F2. As a result, individual search lists may vary from installation to installation. In addition to "Favourites", which is discussed above, the groups are divided under the following headings:

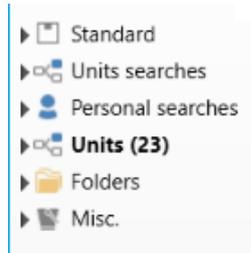


Figure 10: Predefined lists

Each of the main groups are described in detail on the following pages.

Default lists

The group "Standard" is defined during the installation of F2. The lists generally included in "Standard" are specified here.

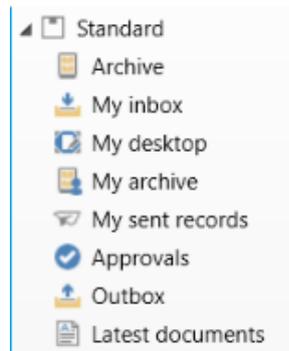


Figure 11: The node "Standard"

"Archive": Contains the total data and information volume in F2.

"My inbox": In general, it contains everything a user receives from internal and external senders, such as records, emails, chats, notes, requests, approvals, responsibility-distributed records and so on. The user can move records from other lists over to his/her inbox via personal management.

"My desktop": Contains all the different kinds of records created by the user. "My desktop" is to be considered as a physical desktop. Each user's daily work is performed from here. The users can add records from other lists to the desktop via the personal management.

"My archive": Contains all types of records the user is or has been involved in at some point. The list functions as a subset of the "Archive".

"My sent records": Contains all types of documents the user has sent, distributed, allocated responsibility for, chatted etc. to other users or participants internally and externally.

"Approvals": Contains a list of all current approvals the user is involved in/is authorised to view.

“Outbox”: Shows all ongoing emails deliveries. When a delivery has been finally sent, it is automatically removed from the “Outbox” and will instead appear in “My sent records”. It is possible to remove failed deliveries from the “Outbox” by right clicking on the delivery in question and choosing **Remove from outbox** in the menu that appears.

“Latest documents”: Here, F2 collects links to the documents the user last worked with.

Units searches

The group “Units searches” is in this example “Doc Organisation” (the authority). The lists in this group vary from installation to installation.

Basically the group “Units searches” contains a number of lists corresponding to the ones found under “Standard”, though this is on a unit level. Here, each organisation defines a number of relevant lists that all users in the F2 can make use of. A technical administrator or an administrator in F2 creates unit searches.

These lists support the unit’s daily work in F2 including communication and management of tasks.

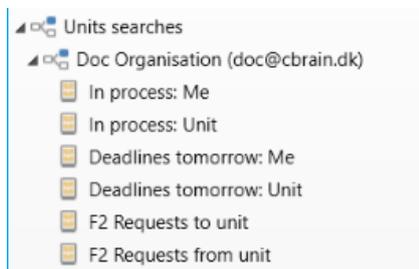


Figure 12: The node “Unit searches”

“In process: Me”: Gives the user an overview of the records where he/she has been allocated responsibility and which have not been completed yet.

“In process: Unit”: Gives the user an overview of the records which have not been completed yet and where the responsibility has been formally allocated to the unit or users in the unit.

“Deadlines tomorrow: Me”: Provides an overview of the records to whom the responsibility has been formally allocated to the user and that have the formal deadline “Tomorrow”.

“Deadlines tomorrow: Unit”: Provides an overview of the records to whom the responsibility has been formally allocated to the unit or a user in the unit and furthermore have the formal deadline “Tomorrow”.

“F2 Request to unit”: The list contains all requests in process that have been sent to the unit or users in the unit.

“F2 Request from unit”: The list contains all requests in process that have been sent from the unit or users in the unit.

Personal searches

The group “Personal searches” contains the lists of specific searches the user has created him/herself. In the figure below, a personal search has been conducted “My personal search”.

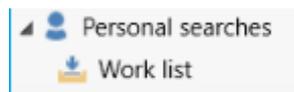


Figure 13: The node “Personal searches”

The lists under the group “Personal searches” vary from user to user. All searches saved by a user are placed under this group. The user determines the name and the period of time a certain list is to be displayed under this group. Each list can continuously be renamed and deleted by the user.

Units

It is possible to view unit lists (i.e. the unit's inbox, desktop and archive) for all the units in which you, as a user, have job roles. See the manual *F2 Shared Emailboxes* (add-on module). In other words, a user with job roles in several units sees two nodes:



Figure 14: “Current unit” and “Other units”

“Current unit”: shows the unit which the user is currently logged into.

“Other units”: is a node that compiles all the other units in which a user has job roles but is not currently logged into.

“Inbox”, “Desktop” and “Archive” for the units in question are displayed under each node as shown below. This way, a user sees, for example, all incoming data in the mailboxes of the different units without having to switch roles.

Note: If a user only has job roles in one unit, “Current unit” will be displayed.

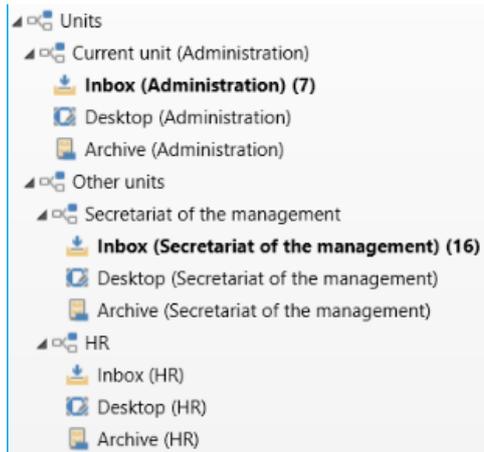


Figure 15: The node "Units"

"Inbox" (the unit's inbox): Contains incoming records which consist of either external emails, records sent internally, or new records where the responsibility has been allocated to the unit. In addition, the unit's users can place records in the inbox and desktop of the unit using unit management.

Note: "Inbox" can function as a distribution centre for all incoming letters (PDF) and emails so that people outside the unit do not have to know every employee in the unit.

"Desktop" (the unit's desktop): Gives the user an overview of the records created by the unit. The unit's users can choose to move records from their inbox or archive to the desktop via unit management.

"Archive" (the unit's archive) : Contains the records that have affected the unit via its inbox or desktop. Each user can move records between the default lists of the unit by putting a checkmark in the control line of the unit.

The nodes can be folded together several levels depending on the display requirements. The unread records in the users' unit inboxes are put together depending on how the nodes are folded.

Below is an example of the node adjustment:

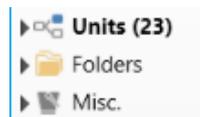


Figure 16: Nodes folded together

If all the nodes are folded, the number of unread records for all unit lists will be displayed.

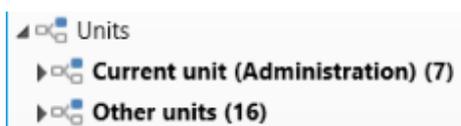


Figure 17: The unit nodes

The unit nodes are displayed folded. The unread records are put together.

Note: The maximum number of unread records for each inbox that F2 can show is 99. If there are more than 99 unread documents in an inbox, 99+ will be displayed by default.

Decentral units

If you have a job role in a decentral unit, unit lists for decentral units (i.e. the unit's inbox, desktop and archive) will also be displayed under the top node "Units". Decentral unit lists are displayed like any other unit list in the main window, as shown below.



Figure 18: Decentral unit

A unit of the type "Decentral unit" works like any other F2 unit, but unlike default units it is not synchronised with the Active Directory (AD).

Decentral units can be used for cross-unit cooperation concerning projects. An additional email address can be linked to this.

Decentral units are created by an F2 administrator. Assigning users to decentral units requires either administrator or unit administrator privileges.

Users that are to be assigned to a decentral unit must have at least one of the following three roles:

- 1) **Decentral role:** This is a job role that gives a user privileges to access and work in a decentral unit.
- 2) **Decentral read access:** This is a role that gives a user privileges to search all records, which are otherwise only available to users in a certain centralised unit. However, the records need to have an access equivalent to "unit". The role corresponds to the role "Read access to another unit".
- 3) **Decentral read/write access:** This role gives a user reading and writing privileges to records, which are otherwise only available to users in a certain decentral unit. However, the records need to have an access equivalent to "unit" or an access equivalent to "all" (if the unit in charge is the decentral unit). The role corresponds to the role "Write and Read access to another unit".

Read more about creating decentral units in *F2 Desktop - Administrator Manual*.

Below is an example of when it might be appropriate to utilize decentral units:

An organisation has a number of units that operate independently under the central administration. These units want to be able to manage a unit structure across a standard F2 unit. The F2 administrator assigns the role of "Unit manager" to one or several users in the organisation, and these can then maintain the decentral units.

Misc. lists

This group contains the following lists:

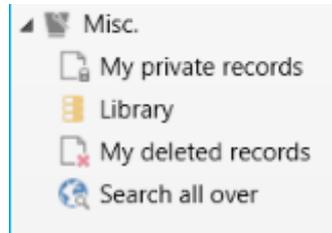


Figure 19: The node "Misc."

"My private records": A user's private records of personal emails and information.

External emails which the users receive in their inbox can be moved to "My private records" as long as the user does NOT in any way add further metadata to this record. If new or updated metadata is automatically or manually added to the record, it will not be possible to move the record to this archive.

If a user wishes to send a private email, it is recommended to do so from this archive.

"Library": This is a common archive for knowledge sharing in the organisation. Here, all users can create links to records. It is not possible to create subfolders in the library. Furthermore, all users have access to this folder.

"My deleted records": A user's own trashcan with records deleted by the user. A deleted record will remain here for 30 days before finally being deleted. If a record is deleted by mistake, it can be restored using the function "Restore record".

"Search all over": All records placed in the archives, "My private records", "Library" and "My deleted records" are made available for a search.

The search is still limited to the user's own private spaces as well as to the authority to which the user belongs.

Folders in list view

The group includes fixed searches, folders depending on the add-on modules, and folders managed by the user him/herself. A user can arrange records into relevant contexts. Folders are displayed in F2 list view on the left side of the main window.



Figure 20: The node "Folders"

"cSearch": The folder "cSearch results" contains results from searches conducted using the search tool cSearch (an add-on module for F2).

"Personal folders": Under this folder, the user can create a number of folders/subfolders which only he/she can see. It is likewise, possible to add cases. Read more about the use of folders and cases in the next section.

"Production dashboards results": The folder shows records from a management cabinet, which is an add-on module for F2.

"Shared folders": This folder is shared with all users under the same authority. Users can create, move, and remove folders and add cases. Empty folders can only be moved or removed.

Below is a description of how personal and shared folders are handled. The procedure for both types of folders is identical.

Create new folder

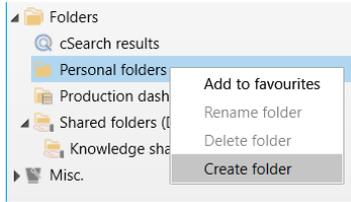


Figure 21: Create folder

To create a new folder, right-click on the folder in which the new folder is to be created.

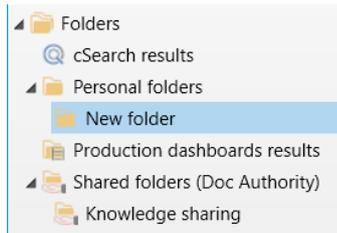


Figure 22: New folder

Click on **Create folder** to create a new folder. Specify the name of the new folder.

Rename folder

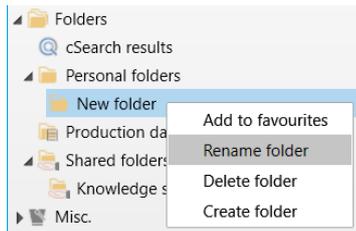


Figure 23: Rename folder

To change the name of a folder, right-click on the folder in question and click on **Rename folder**. Then change the name of the folder.

Delete folder

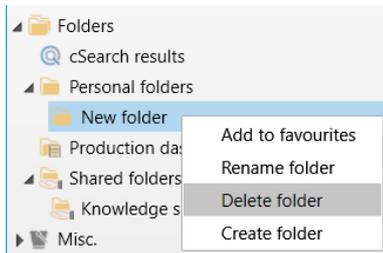


Figure 24: Delete folder

To delete a folder, right-click on a folder and click on **Delete folder**.

If the folder does NOT contain any shortcuts to records, the message below will be displayed.

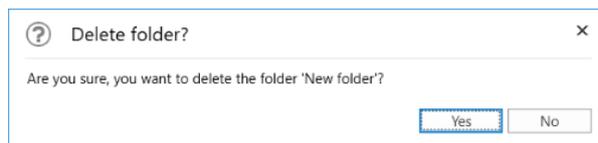


Figure 25: Confirm folder deletion

A folder containing shortcuts to records CANNOT be deleted. If, nonetheless, the user tries to delete the folder, the message below will be displayed.

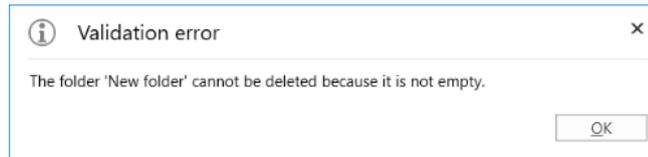
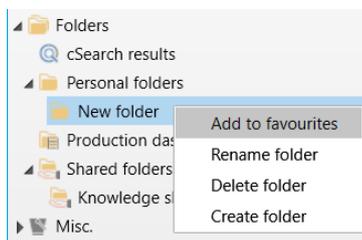


Figure 26: The folder cannot be deleted

Note: If it is a joint folder, it might contain records that are NOT visible to the user because of the access restriction of the records. A folder can therefore appear empty, without actually being empty.

Add to favourites



It is possible to add a folder to the "Favourites" list, which is each user's personal list view of the folders and lists often used by the users.

To add a folder to "Favourites", right-click on the folder in question and then on **Add to favourites**. The folder will then be added to the "Favourites" list.

Figure 27: Add to favourites

Move folder

To move a folder, drag it with the mouse to a new location. Moving a folder maintains the shortcuts to the record in the folder.

Note: It is possible to move records to the top nodes "Personal folders" and "Shared folders".

Create shortcut to a record in a folder

To link records to folders simply drag the records from the main window to the folders.

The users can link the same record to an unlimited number of folders. F2 creates a shortcut in each folder.

The following dialogue appears when the users drag a record to a folder.

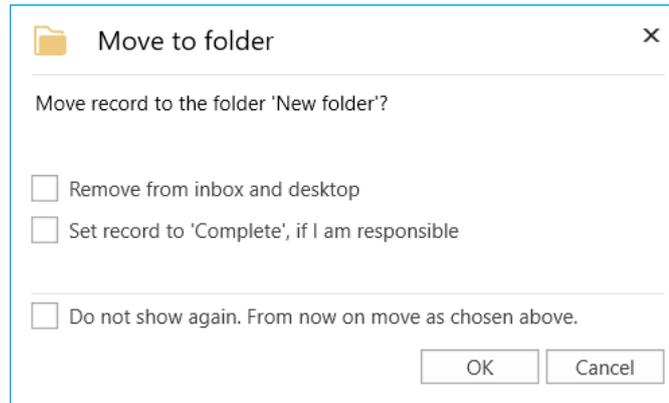


Figure 28: Move records to archive

The dialogue illustrates the choices a user has when he/she decides to move a record to a folder. Firstly, the user can choose to "Remove from inbox and desktop". Secondly, the user can "Set record to 'Complete', if I am responsible". Lastly, the user can save the movement process, and determine if he/she wants the dialogue to open again the next time the same process is to be established, by checking-off the "Do not show again. From now on move as chosen above".

Add cases as folders in the main window's folder structure

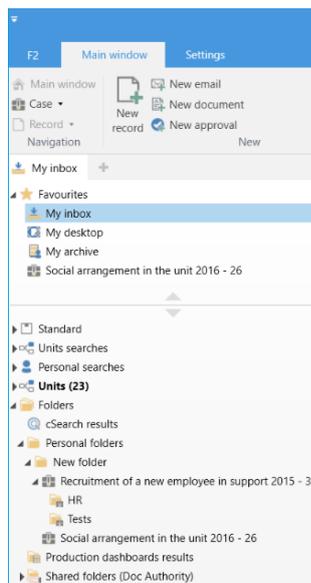


Figure 29: Cases added to the folder view

In the main window's list view, it is possible to add cases to personal and shared folders.

Cases are added to folders by simply dragging the case in question from the result list over to the desired folder in the list view. When the case is released onto the desired folder, the case then appears with a case icon, title and case number under the folder, as can be seen in the example to the right.

If a case has subfolders, these can be unfolded in the folder structure. Be aware that case subfolders cannot be created, deleted or renamed in the folder structure.

The case is automatically updated when records are added or removed to/from the case.

Scrollbars in Favourites and Standard lists in the main window

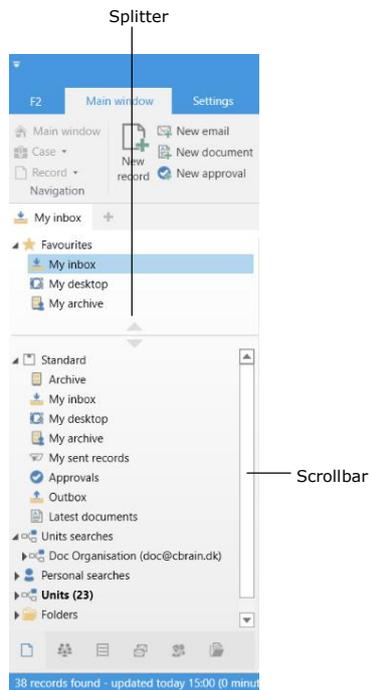


Figure 30: Splitter and Scrollbar

There are scrollbars in the “Favourites” and “Standard” lists in the main window.

The sizes of the favourites and the default lists are interrelated and can be adjusted using a splitter according to each user's individual viewing preferences.

To unfold the list view completely, click on the up/down arrow.

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