



# **F2 Desktop**

Main window

Version 6.1

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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 manager's need for a well-arranged and flexible tool that focuses on the user and in which the need for registration is supported automatically as a by-product of the case manager's work.

## Reading instructions

This document is part of the manual for the F2 Desktop client (hereafter F2) and has been prepared as a guide to help you understand the functions and flows of F2. Each section can be read independently.

The F2 Desktop client manual has been divided into seven submanuals 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 submanual that you are currently reading is marked in blue.

The document uses an F2 version in which all add-on modules are enabled. Depending on how many add-on modules each organisation has included in its F2 solution, users may notice differences between their F2 and the one discussed in this manual.

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

If this document contains references to other documentation in which further information on a specific functionality may be found, the name of the relevant document or section is in *italics*.

This document includes several screenshots to help demonstrate the described functionality. Screenshots with lines and accompanying text indicate where to click in F2, while screenshots with blue squares designate areas 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**

In addition to the subjects 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**

Documentation relating to F2 as well as a wide range of technical subjects also exists.

Below is a list with a few examples:

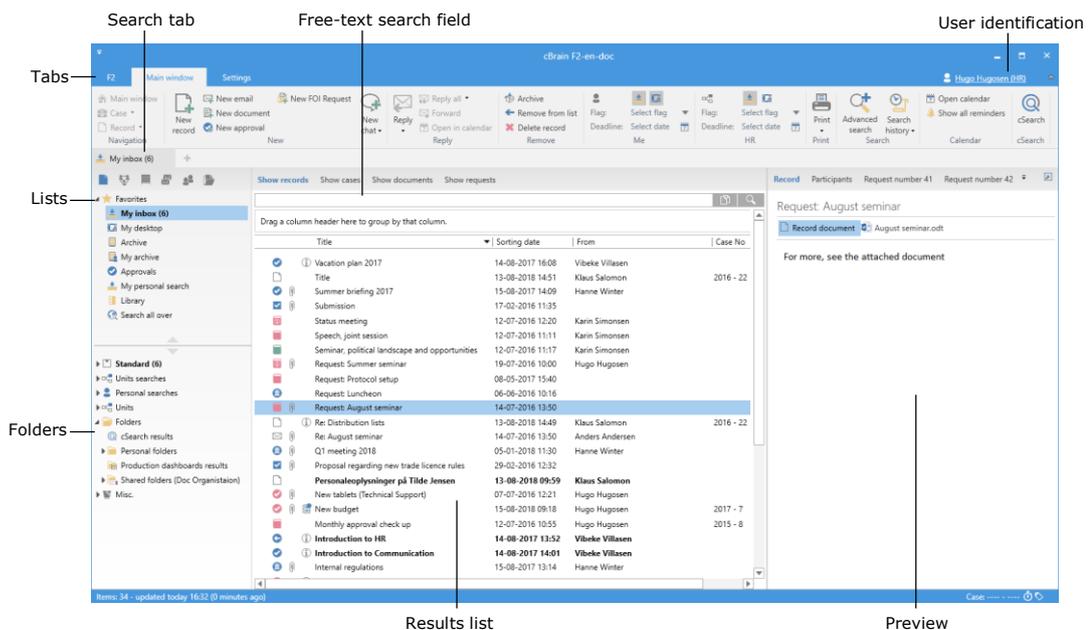
- F2 Desktop – Administrator Handbook
- F2 Desktop – Installation manual
- F2 Desktop – Operations manual.

We hope you enjoy using F2.

# The main window's structure

The main window is what users see when logging into F2. Here users keep track of their tasks, read incoming 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.

F2's main window is shown below.



**Figure 1: Main window structure**

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

F2's layout resembles that of ordinary email clients, and records and email records can be previewed from the main window for better orientation. Additionally, the main window lets users access the "Archive" directly via the search function and the lists. The main window serves as the system start page on which users can access e.g. general settings as well as their inbox, desktop and archive.

There are three standard tabs in the main window: "F2", "Main window", and "Settings". Each tab has a ribbon consisting of several menu groups. From these the user has access to a number of menu items used for navigation, performing actions and managing the window layout.

Farthest to the right is the user identification showing, among other things, the user's name and current unit.

The search tabs of the main window are used to perform searches and having multiple searches open simultaneously. For further information, see the section *Search tabs*.

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

The left side of the main window displays several lists, e.g. "Favourites" under which the user can add frequently used lists or personal searches. The lists are used for displaying a particular subset of data from the "Archive".

The user can also create personal lists not visible to anyone else. These personal lists are displayed along with the default lists on the left side of the main window. By clicking on a relevant list, the user can navigate to a desired record, case or document.

Below the lists F2 displays its folders, which are utilised by the user for manual organisation of records into private and shared folders.

Next to the lists and folders F2 displays what is known as the results list. The results list shows the content of a chosen search list, i.e. the records, cases or documents searched for.

With F2's preview enabled, the user can view a PDF version of any record or document in the results list. The preview can be displayed in a window next to or below the results list depending on the user's personal settings and setup.

Above the lists and folders of the main window is the navigation line from which it is possible to switch between displaying records, meetings, other inboxes and contacts (F2's participant register). The functions displayed depend on the number of F2 add-on modules included in the F2 installation.

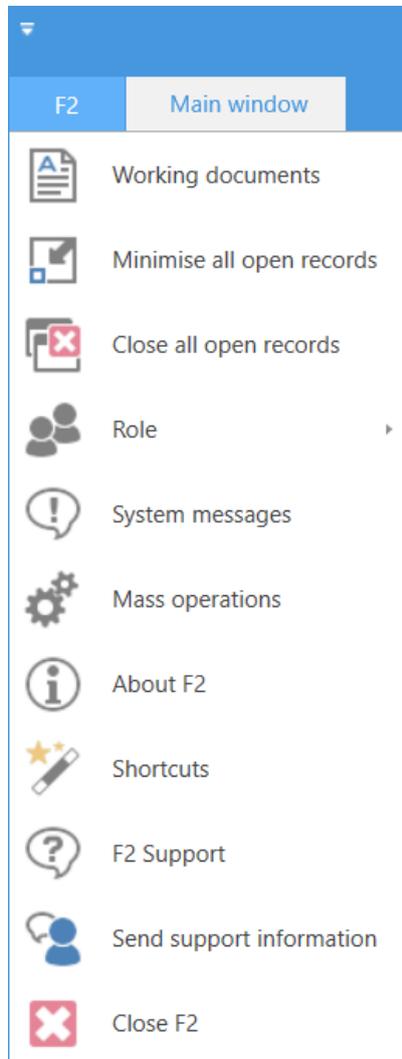
Any information generated or received in F2 is stored in F2's central archive only. The lists are actually archive searches based on metadata and the user's search phrases.

## **Introduction to the content of the main window's tabs**

The different tabs of the main window are described below.

### **The "F2" tab**

The "F2" tab contains several functions pertaining to the general use of F2, including running F2 and support. Some of its menu items can also be found in the "F2" tab in the record and case windows.



**Figure 2: F2 menu**

**Working documents:** Provides an overview of open documents in F2 with pending changes that are not yet saved to the database.

**Minimise all open records:** Minimises all open record windows.

**Close all open records:** Closes all open records. If an open record has been changed, the dialogue “Save changes?” appears. After the user responds to this dialogue, the record will close.

**Role:** Users with several job roles in F2, including on-behalf-of rights, can switch between 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 number, etc. The F2 protocol association (normally an f2p:// link) is remade here. This is done to ensure that an F2 link opens in the correct F2 desktop client, e.g. after switching between F2 production, archive and/or test systems.

**Shortcuts:** Opens a window displaying shortcuts available in F2.

**F2 Support:** Directs the user to the home page specified in the installation as the support page of the organisation. This is typically an intranet page.

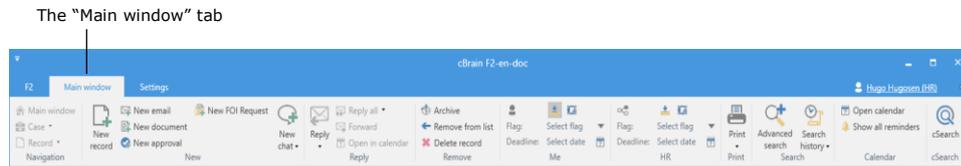
**Send support information:** From here the user can send information to F2 support directly.

**Close F2:** Shuts down F2.

## The “Main window” tab

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

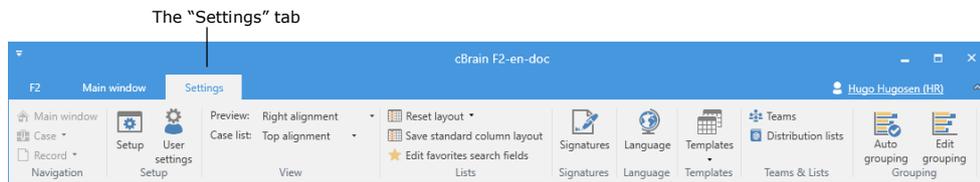
Each menu item in the main window's menu ribbon is described in more detail in the submanuals *F2 Desktop – Records and communication*, *F2 Desktop – Management and organisation* and *F2 Desktop – Search functions*.



**Figure 3: The ribbon of the "Main window" tab**

## The "Settings" tab

Using the functions of the "Settings" tab, users can adjust F2 to their individual preferences in relation to preview methods and to determine how F2 handles a number of actions. For more on this, consult the submanual *F2 Desktop – Settings and setup*.



**Figure 4: The ribbon of the "Settings" tab**

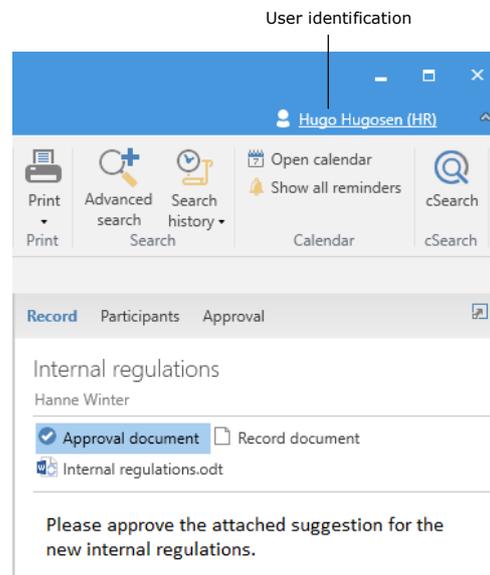
## User identification and fast role change

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 which user is currently logged into F2 as well as the current user's unit. The screenshot to the right identifies the current user as Hugo Hugosen from HR.

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

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

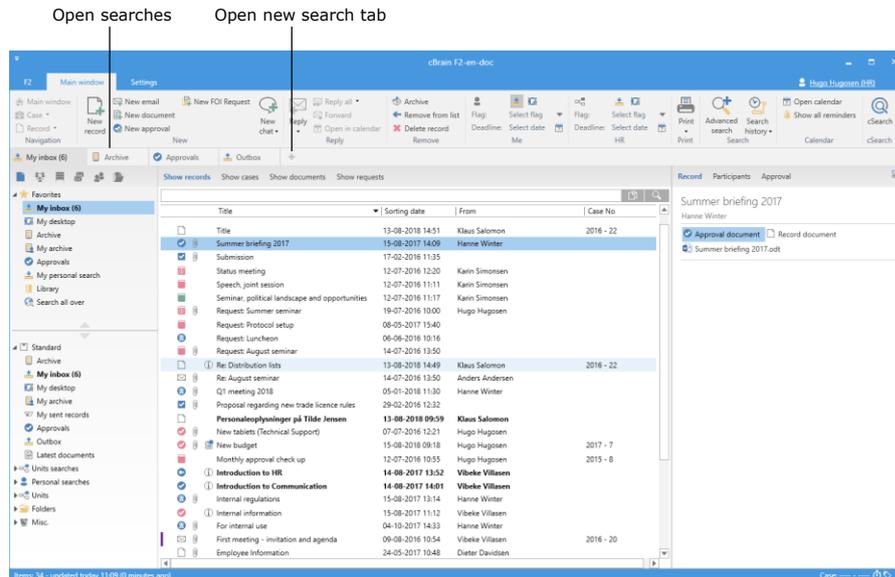


**Figure 5: User identification**

## Search tabs

As described in the section *The main window's structure*, the main window contains search tabs which are used for performing several searches simultaneously. This is particularly useful when performing related searches.

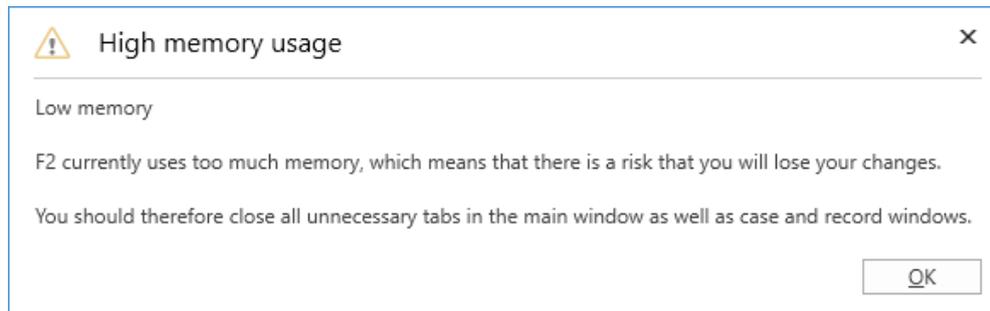
New search tabs can be opened by clicking on  or by using the shortcut **Ctrl+T**.



**Figure 6: Search tabs in the main window**

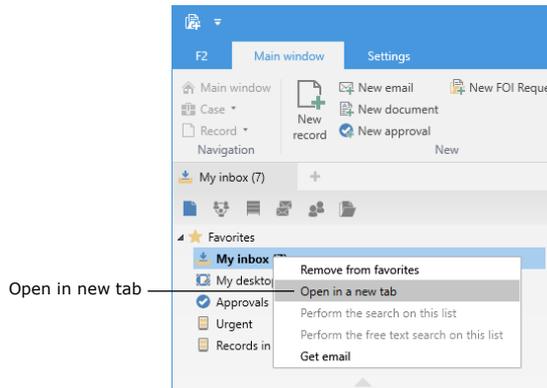
All search tabs will close when switching from one user to another. However, if the user switches roles the search tabs remain open.

**Note:** Each open search tab increases the memory usage of the F2 Desktop client. If memory usage reaches a critical level, a warning will appear.



**Figure 7: High memory usage warning**

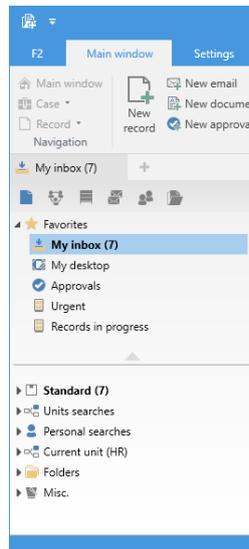
## Open list in a new tab



The function "Open in new tab" can be selected by right-clicking on a list, a production dashboard, or internal parties. Click on **Open in new tab** to open the selected list in a new tab.

**Figure 8: Open list in a new tab**

## Lists and folders in F2



F2's standard lists and the personal lists defined by each user 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 areas.

**Note:** The division may vary from installation to installation.

**Figure 9: Groups of lists**

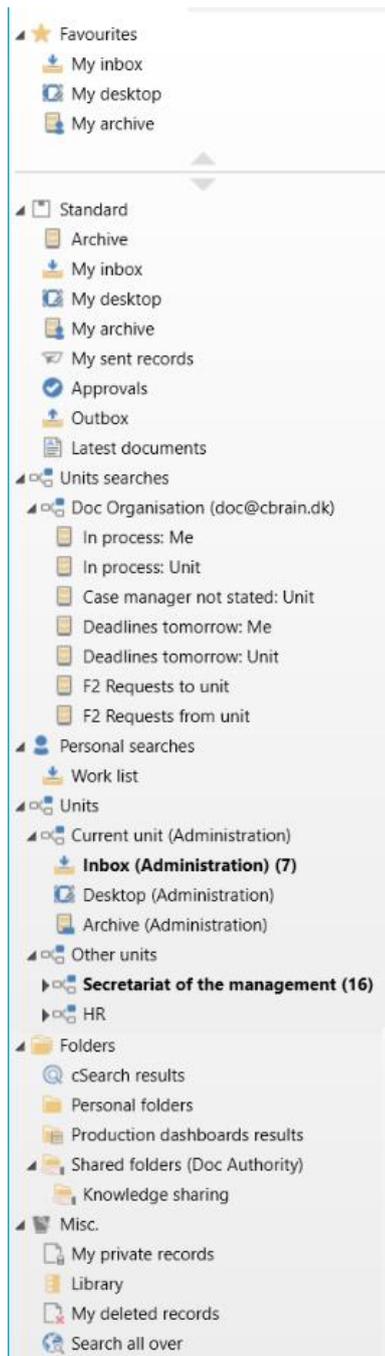


Figure 10: List view

**“Favourites”**: In this area the user can add frequently used lists. These may be 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 include the lists “My inbox”, “My desktop”, “My archive”, “My sent records”, “Outbox” and “Latest documents”.

**“Units searches”**: Contains lists of the organisation to which the user has access. The lists are adapted to each organisation and can be edited by an administrator.

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

**“Units”**: This shows the unit lists (i.e. the unit’s inbox, desktop and archive) for all units in which a user has job roles. This means that a user with a job role in multiple units will see two nodes:

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

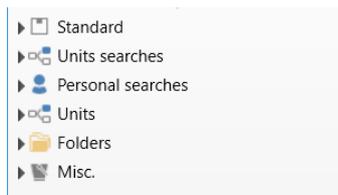
**Note:** If a user only has a job role in a single unit, the “Other units” node is not displayed.

**“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, their deleted records, a shared library and the option to search in all of F2.

## Predefined lists in F2

The F2 installation comes with a set of predefined lists located on the left side of the main window. These lists are configured during the setup of F2, which is why the user’s search lists may vary from installation to installation. In addition to “Favourites”, which is discussed above, the groups are divided into the following headings, shown in the figure below:

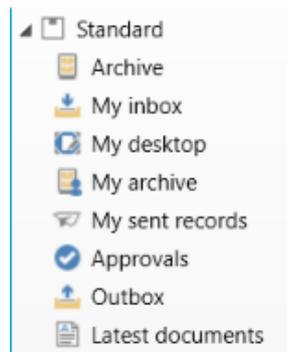


**Figure 11: Predefined lists**

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

## Standard lists

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



**Figure 12: The "Standard" node**

**"Archive"**: Contains the total amount of data and information in F2.

**"My inbox"**: Generally, contains everything a user receives from internal and external senders, such as records, emails, chats, notes, requests, approvals, responsibility-distributed records, etc. Users can move records from other lists to their inbox via personal management.

**"My desktop"**: Contains all the various 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 personal management.

**"My archive"**: Contains all types of records the user is or has been involved in. 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"** (add-on module): Contains a list of all current approvals the user is involved in/is authorised to view.

**"Outbox"**: Shows all active deliveries. When a delivery has been sent, it is automatically removed from the "Outbox" and appears in "My sent records" instead.

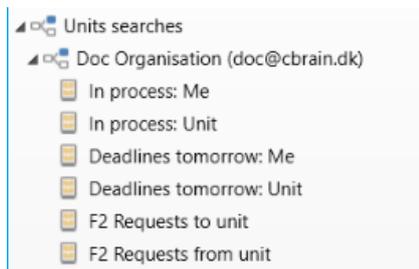
**"Latest documents"**: Here, F2 collects the links to documents recently opened by the user.

## Units searches

In this example, the "Units searches" node displays the "Doc Organisation". The lists in this group vary from installation to installation.

"Units searches" contains a number of lists corresponding to the ones found in "Standard", but pertaining to the unit instead of the individual. Here, each organisation defines a number of relevant lists that all users in F2 may access. Units searches are created by a technical administrator or an administrator in F2.

These lists support the unit's daily work in F2, such as communication and task management.



**Figure 13: The "Unit searches" node**

**"In process: Me"**: Provides an overview of the records for which the user is responsible and which have not yet been completed.

**"In process: Unit"**: Provides an overview of the records which have not yet been completed and for which the unit or users in the unit are responsible.

**"Deadlines tomorrow: Me"**: Provides an overview of the records for which the user is responsible and have the formal deadline "Tomorrow".

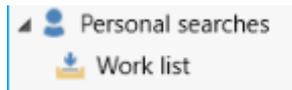
**"Deadlines tomorrow: Unit"**: Provides an overview of the records for which the unit or a user in the unit is responsible and have the formal deadline "Tomorrow".

**"F2 Request to unit"** (add-on module): This list contains all requests in process that have been sent to the unit or users in the unit.

**"F2 Request from unit"** (add-on module): This list contains all requests in process that have been sent from the unit or users in the unit.

## Personal searches

The node "Personal searches" contains the search lists created by the user. In the figure below, one personal search, "Work list", has been created.

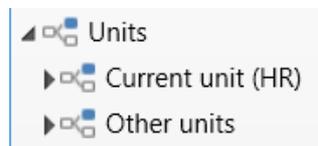


**Figure 14: The "Personal searches" node**

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

## Units

For each unit in which the user has a job role, it is possible to view unit lists (i.e. the unit's inbox, desktop and archive). For more information, refer to the manual *F2 Shared Emailboxes* (add-on module). This means that a user with job roles in several units will see two nodes:



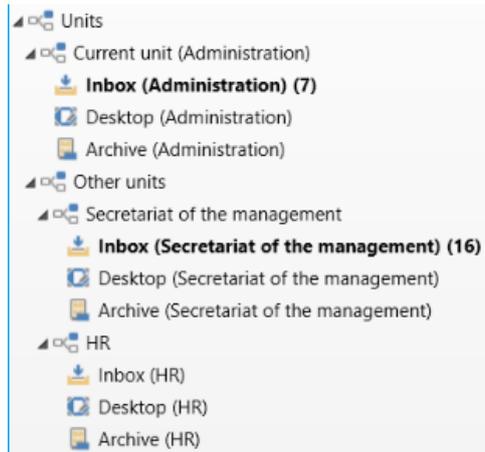
**Figure 15: "Current unit" and "Other units"**

**"Current unit"** shows the user's current unit.

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

"Inbox", "Desktop" and "Archive" for each unit are displayed in the nodes as shown below. This lets the user see e.g. all incoming data in other unit mailboxes without having to switch roles.

**Note:** If a user does not have job roles in several units, only the "Current unit" will be displayed.



**Figure 16: The "Units" node**

**"Inbox"** (the unit's inbox): Contains incoming records, i.e. external emails, records sent internally or new records for which the unit is responsible. In addition, the unit's users can place records in the inbox and desktop using unit management.

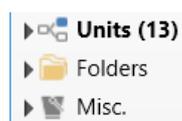
**Note:** The "Inbox" can serve as the unit's distribution centre for incoming records, allowing its users to divide work tasks between them.

**"Desktop"** (the unit's desktop): Provides 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 all records which the unit and its users have handled via the unit's inbox and desktop. A user can move records between the standard unit lists and assign flags via the unit's menu group in the ribbon of the "Main window".

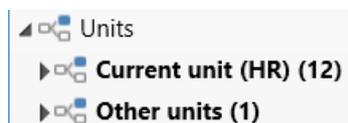
The nodes can be collapsed and expanded at the user's discretion. The number of unread records in the user's unit inboxes are added up depending on the node expansion level.

Below is an example of the node adjustment:



**Figure 17: Nodes collapsed**

If the "Units" node is collapsed, the total number of unread records for all unit lists is displayed.



**Figure 18: The unit nodes**

To the left "Units" is expanded to show all unit nodes. The unread records of each unit node are added up to the collapsed view shown above.

**Note:** The maximum number of unread records shown for each inbox is 99. If there are more than 99 unread records in an inbox, "99+" will be displayed by default.

## Decentral units

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



Figure 19: Decentral unit

## Miscellaneous lists

This group contains the following lists:

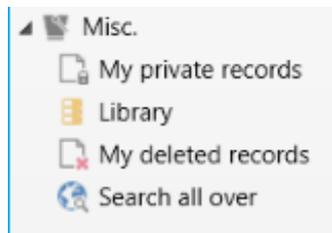


Figure 20: The "Misc." node

**"My private records"**: A user's private list for personal emails and information.

External emails sent to the user's inbox can be moved to "My private records" ONLY if the user does not in any way add further metadata to these records. If any metadata is added or updated either automatically or manually, the record cannot be moved to this list.

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

**"Library"**: This is an archive used for knowledge sharing in the organisation. All users can create records here, but it is not possible to create subfolders. This folder can be accessed by all users.

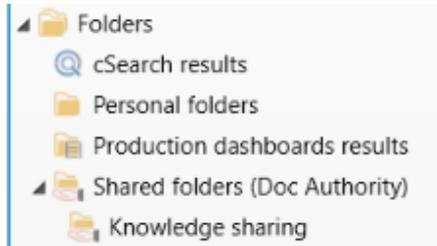
**"My deleted records"**: The user's personal recycle bin for deleted records. In co-operation with the organisation, cBrain will configure the period of time a deleted record stays in the bin. If a record is deleted by mistake, it can be restored using the function "Restore record".

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

However, the search is limited to the user's private folders and lists as well as the authority to which the user belongs.

## Folders in list view

This group includes fixed searches, folders for any add-on modules, and folders managed by the user. This lets the user organise records into relevant contexts. The folders are displayed in F2's list view on the left side of the main window.



**Figure 21: The "Folders" node**

**"cSearch"**: The "cSearch results" folder contains results from searches performed using the search tool cSearch (add-on module). For further information, see *F2 cSearch – User manual*.

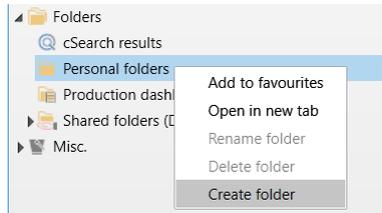
**"Personal folders"**: In this folder, the user can create a number of folders/subfolders which are visible only to the user. It is also possible to add cases. Further information about the use of folders and cases can be found in the next section.

**"Production dashboards results"**: This 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. Only empty folders can be moved or removed.

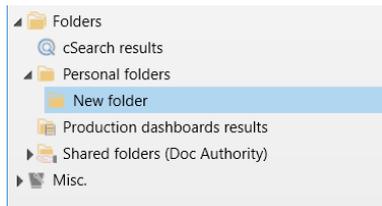
Below is a description of how to manage personal and shared folders. The procedure for both types of folders is identical.

## Create new folder



**Figure 22: Create folder**

Right-click on the folder in which the new folder is to be created.

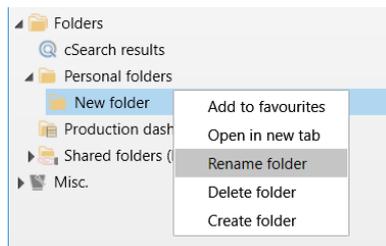


**Figure 23: New folder**

Click on **Create folder**. Specify the name of the new folder.

**Note:** It is possible to create a folder structure with several levels. The procedure is the same as when creating a new folder. Right-click on the desired folder to create a subfolder.

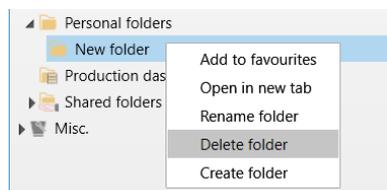
## Rename folder



**Figure 24: Rename folder**

To change the name of a folder, right-click on the folder and select **Rename folder**. Then enter a new name.

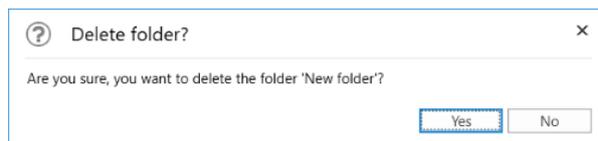
## Delete folder



**Figure 25: Delete folder**

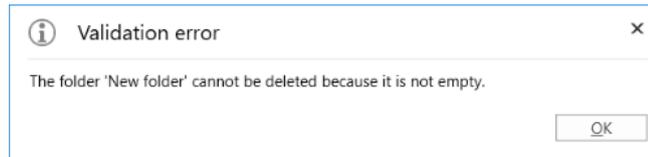
To delete a folder, right-click on a folder and select **Delete folder**.

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



**Figure 26: Confirm folder deletion**

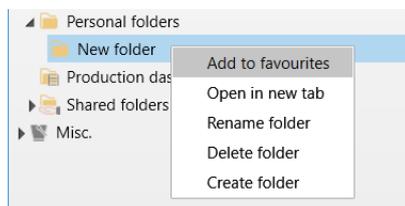
A folder containing shortcuts to records CANNOT be deleted. If the user tries to delete the folder, the message below will be displayed.



**Figure 27: The folder cannot be deleted**

**Note:** A shared folder may contain records that are invisible to the user due to their access restriction. This means that a folder may appear empty without actually being empty.

### Add to favourites



A folder can be added to the "Favourites" list, which is each user's personal list view of frequently used folders and lists.

To add a folder to "Favourites", right-click on the desired folder and select **Add to favourites**. The folder is then added to the "Favourites" list.

**Figure 28: Add to favourites**

### Move folder

To move a folder, click on it and drag it with the mouse to a new location. Moving a folder retains any shortcuts to the folder's records.

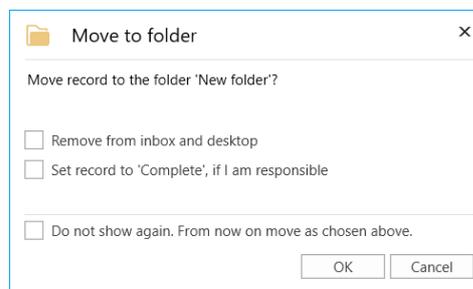
**Note:** Records can also be moved to the top nodes "Personal folders" and "Shared folders".

### Create a shortcut to a record in a folder

To link records to folders, simply drag and drop them from the main window's results list to the desired folder.

A record can be linked to an unlimited number of folders. F2 will create a shortcut in each folder to which the record is dragged and dropped.

The following dialogue appears when the user drags a record to a folder.

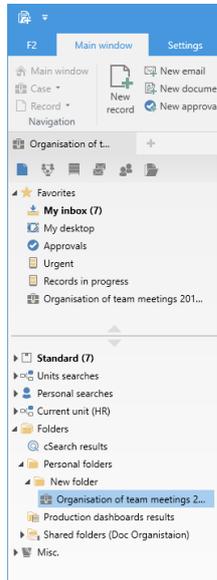


**Figure 29: Move record to archive**

When a shortcut is created in the chosen folder, the user must also decide if the record should be set to completed and moved to the "Archive".

The "Move to folder" action can be cancelled by clicking **Cancel**.

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



**Figure 30: A case added to the folder view**

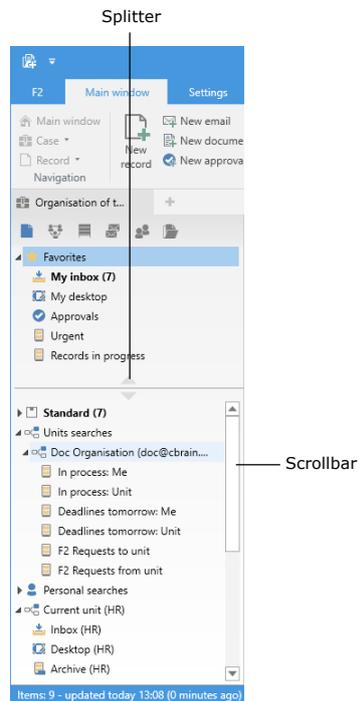
Cases can be added to personal and shared folders in the main window's list view.

A case is added to a folder by simply dragging it from the results list to the desired folder in the list view. When the case is dropped onto the folder, it appears with a case icon, title and case number in the folder as shown to the right.

Any subfolders on a case can be expanded and collapsed in the folder structure, but note that case subfolders cannot be created, deleted or renamed here.

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

## Scrollbars in Favourites and standard lists in the main window



The "Favourites" and "Standard" lists in the main window both have scrollbars.

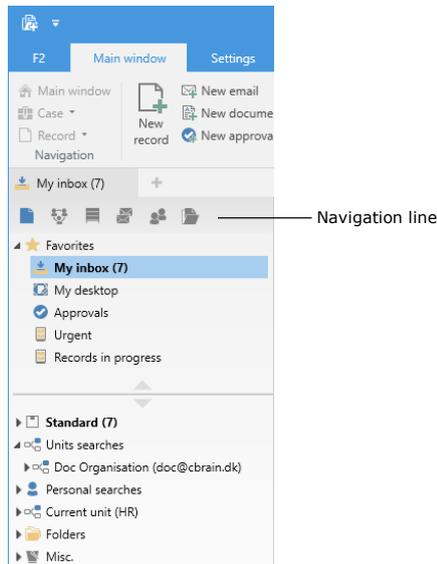
The sizes of the favourites and standard lists are interrelated and can be adjusted using a splitter according to the user's viewing preference.

To fully expand either list view, click on the arrow above or below the splitter.

**Figure 31: Splitter and scrollbar**

## The main window's navigation line

Above the lists and folders of the main window is the navigation line. By using its icons, the user can switch between different views in F2.



**Figure 32: Navigation line**



**Records:** Shows lists and folders.



**Meetings (add-on module):** Shows meetings to which the user has access.



**Production dashboards (add-on module):** Shows production dashboards to which the user has access.



**Inboxes:** Shows unread records in the inboxes of users for whom the user has on-behalf-of rights.



**Contacts:** Shows the participant register.



**Freedom of information requests (add-on module):** Shows active and completed FOI requests.

**Note:** The navigation line icons may vary depending on add-on modules and F2's configuration.

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