F2 Desktop

Search functions

Version 6.2

© Copyright 2019 cBrain

Table of Contents

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 the user understand the functions and flows of F2. Each section can be read independently.

The F2 Desktop client manual has been divided into six manuals that consist of:

1. The main window
2. Search functions
3. Settings and setup
4. Records and communication
5. Working with cases
6. Management and organisation

The manual 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*.

The 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 manual
- F2 Desktop – Installation manual
- F2 Desktop – Operations manual.

We hope you enjoy using F2.

Searches in F2

Fundamentally, F2 offers its users two different search options. The first is the possibility to perform searches in the F2 Desktop client, and the second is using the add-on module cSearch. This manual will describe the first option – searches performed in the F2 Desktop client.

In F2 all users work in one shared archive. All emails to and from users, documents from the shared drives of the organisation, from user PCs, etc. are gathered here. This means that all information in F2 exists in one place only – the "Archive". For this reason, F2 uses the "Archive" as a starting point when performing a search.

Lists and folders in F2 are all part of the "Archive". A user can search in any of the lists or folders displayed on the left side of the main window. The user only needs to go to the desired list and perform a search.

The search results are confined to items (e.g. records or cases) from the chosen list. Additionally, users will only be able to see records and cases to which they have access. The number of search results displayed depends on each user's setup. In the "Setup" dialogue on the "Settings" tab the user can determine the number of search results displayed by F2. For further information, see *F2 Desktop – Settings and setup*.

The easiest way to perform a search in F2 is by using the free-text search field. To ensure that a search is precise, it is possible to use search operators and specific metadata criteria. The various search options are described in the following sections.

Free-text search

As a standard, a free-text search searches in all the records that the user has access to. The searchable text consists of:

- Documents
  - Content
  - Title
  - External ID
- Participants
  - Email address
  - Name
  - Unit
  - Role
- Annotations
  - Annotation text
- The record itself
  - Record ID
  - Title
  - Keywords
  - Searchable extended data (requires a special setup)
- The case the record is attached to
  - Title
  - Keywords
  - Progress code
  - Searchable extended data (requires a special setup)

- Chats and notes on the record where the user is a participant
    - Text
    - Title.

The free-text search field is found above the results list in the main window.

The user selects a list on the left side of the main window by clicking on it and enters a search string in the search field. The search is executed by pressing **Enter** or by clicking on the **magnifying glass**. If the user has selected the "Archive" list, the search will be performed in all of the archive. If the user selects another list, e.g. "My inbox" or "My archive", the search will be performed only within the boundaries of that specific list.

Deleted and private records are not included in the "Archive". If the user wants to "Search all over", which is the bottom option in the "Misc." node on the left side of the main window, the search will cover not only the "Archive", but also "My private records" and "My deleted records".

When the user enters a search string in the free-text search field and then presses **Enter** or clicks the **magnifying glass**, F2 will search for the string in the content of records, cases, metadata and attached documents.

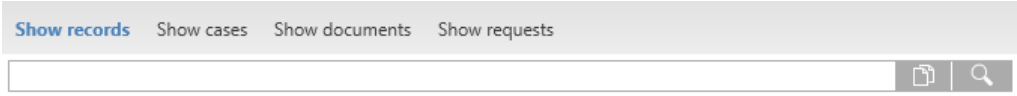

Figure 1: The free-text search field

Searches performed in the free-text search field search for complete words as a standard. For example, if the user enters the word "day" in the free-text search field and presses on **Enter** or clicks on **Search**, F2 automatically places a space after the search word. This means that F2 searches for results that contain the specific word but not variations like "daylight" or "birthday".

If the user wishes to search for a word that starts with "day" this is done by adding an asterisk after the search word ("day*"). F2 then searches for results containing both "day" and results that start with day, such as "daylight".

If multiple words are entered, e.g. *department head*, F2 will search for both words and include results in which both words appear.

F2 does not distinguish between upper- and lowercase letters.

When performing a search using the free-text search field in the main or case window, three dots appear in the bottom right corner indicating that a search is in progress.

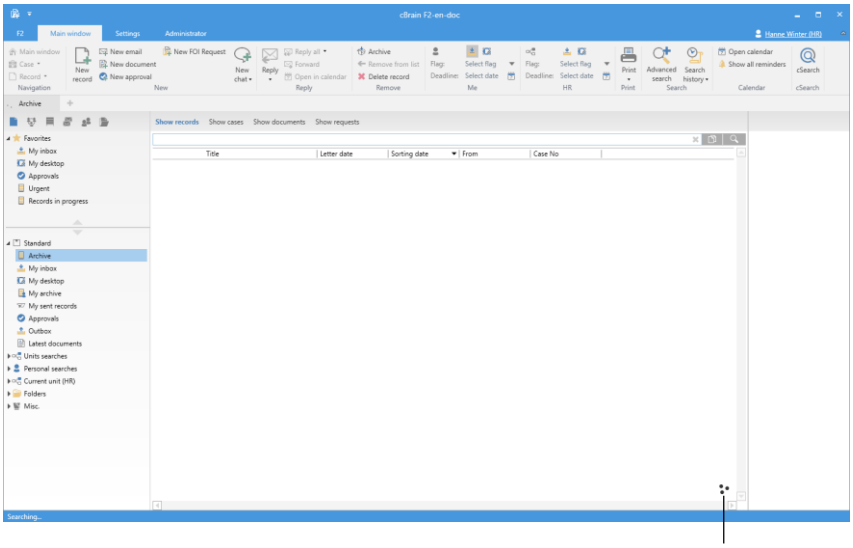

Figure 2: Search performed in the "Archive"

Search with filtering

The free-text search field may also be used to filter a list of search results, which is useful for narrowing down a search with many results. Filtering does not start a new search, but filters an existing one. This means that filtering can also be used in saved lists that contain a large volume of records or cases.

When a search has been performed, the user can filter the results by typing a search string into the free-text search field. F2 then starts showing results in which the string appears.

F2 performs a fresh search with the chosen criteria when the user presses **Enter** or clicks on the search icon.

Filtering can be disabled under "General" in the "Setup" dialogue on the "Settings" tab in the main window. Here the user can choose between "Search with filtering" and "Standard search". A standard search requires the user to press **Enter** or click on the search icon.

"Perform the search on this list"

After performing a search on a list, the user can perform a search with the same criteria on another list without selecting it. Right-click on a list, e.g. the "Archive" (without left-clicking on it first), and select "Perform the search on this list" in the context menu. Note that the search criteria will be lost if the new list is selected before right-clicking.

"Perform the search on this list" can only be used with standard lists. Standard lists are lists without other search criteria than a standard search, such as "My Inbox" or "My Desktop".

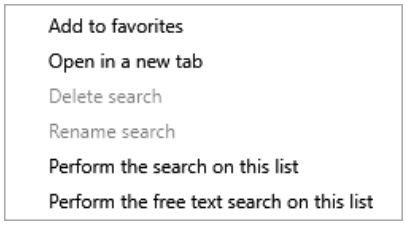

Figure 3: "Perform the search on this list" in the context menu

From the context menu, the user also has the option to search another list for only the text from the free-text search field, "Perform the free text search on this list". This search applies the current content in the free-text search field to the list on which the user has right-clicked. Note that the search criteria will be lost if the new list is selected before right-clicking.

Using f2p links in the free-text search field

F2p links can be used in the free-text search field. F2p links are links created in F2 that lead directly to either a record, case or document. An f2p link is created using the menu items "Copy link to record", "Copy link to case" or "Copy link to document". Read more about f2p links in *F2 Desktop – Records and communication*.

Insert an f2p link in the free-text search field by either using the right-click menu or the shortcut Ctrl+V. Press **Enter** to open the record or case directly.

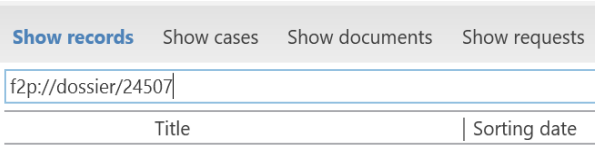

Figure 4: An example of an f2p link

> **Note**: Since an f2p link refers to a certain record, case or document, it will always be the record/case in question that is opened despite what the result list is set to display.

Search using operators

Performing a free-text search can yield an extensive list of results. Using operators may help narrow down the results.

Operators can be used in both free-text searches and when searching via search fields. For further information on search fields, see *Advanced searches*.

The following operators are available in F2:

- Asterisk (*)
- AND
- OR
- NOT
- Quotation marks (" ")

F2 regards the list above solely as operators. It is not possible to perform searches that consist only of these symbols/words as they are used for defining a search. In other words, **, AND, OR, NOT* and "" cannot be used as search strings.

It is possible to combine several operators in one search.

Search using *

The user can enter a search string followed by * to search for words in which that string is included. If *day** is typed into the search field, all records in the chosen list whose content, title or case title contain words that begin with *day* (e.g. *daylight* or *daytime*) will appear in the results list.

Strings written in a search field without the asterisk (*) are perceived as whole words. For example, if the user types *day* in a search field, any records that contain the word *day* are found, but not records that, for example, contain the word *days*. The applies to all search fields *except* the free-text search field.

> **Note**: It is only possible to use one asterisk per search word. If two asterisks are inserted in a word (e.g. T*hursday*), F2 will perceive it as two words and search for results that contain words starting with "t". This will result in a server time-out, as searches for only one letter will yield too many results.

Search using AND

Typing *AND* between two search words will search for records that contain both words. This means that typing *minister AND department* will find all records containing both words.

If the user searches for two words separated by a space, the search will be carried out as if there were an *AND* between the words. *AND* is thus the implicit operator between two words when nothing else is specified.

Search using OR

Typing *OR* between two search words will search for records containing either word. This means that entering *minister OR department* will find all records containing either *minister* or *department*.

Using *OR*, F2 will also search for records whose content, record title or case title contains both search words.

Search using NOT

The *NOT* operator is for searches in which a user needs results whose content or title contain search word A, but exclude search word B. This can be done by entering *[search word A] NOT [search word B]*.

For example, the search *ministry 2012 NOT department* will return all items in the selected list whose content, title or case title contain both the words "ministry" and "2012". It will exclude results containing the word "department".

It is not possible to perform a search that contains only “NOT” followed by a word. The reason is that the database has to generate a positive search list before it can remove records which do not contain the term specified after “NOT”.

Search using quotation marks “”

If a word combination is put in quotation marks (“”), for example “Mary Smith”, F2 will search for this exact search string. This means that items containing “Mary Jane Smith”, “Mary and John Smith”, etc. will not appear in the result list.

Search using parentheses

Search words are grouped by using parentheses. For example, a search for *“meeting” AND “agenda” OR “participants”* will give results that contain either the two words “meeting” and “agenda” or results containing the word “participants”. The search can be more precise by adding parentheses around some of the search words. For example, a search for *“meeting” AND (“agenda” OR “participants”)* will give results containing both “meeting” and “agenda”, along with results containing “meeting” and “participants”.

Stop words configuration

A function called “Stop words” can be applied to searches. This is done in cooperation with cBrain. Stop words are words, symbols, etc. that should NOT be included in free-text searches.

These include common words such as “and”, “but” or “for”. With the “Stop words” function activated, if the user enters a stop word in a search or metadata field, no results will be displayed.

Advanced searches

A search using the free-text search field is often a very broad search. F2 offers to search for specific metadata. This is an advanced search.

The advanced search can be accessed via the menu item “Advanced search” in the main window ribbon. Using the metadata fields of the advanced search, users are able to specify various search criteria. “Advanced search” also contains the “Save search” option, which is discussed in the section *Saving a search*.

Click on **Advanced search** in the main window ribbon to display the groups of search fields.

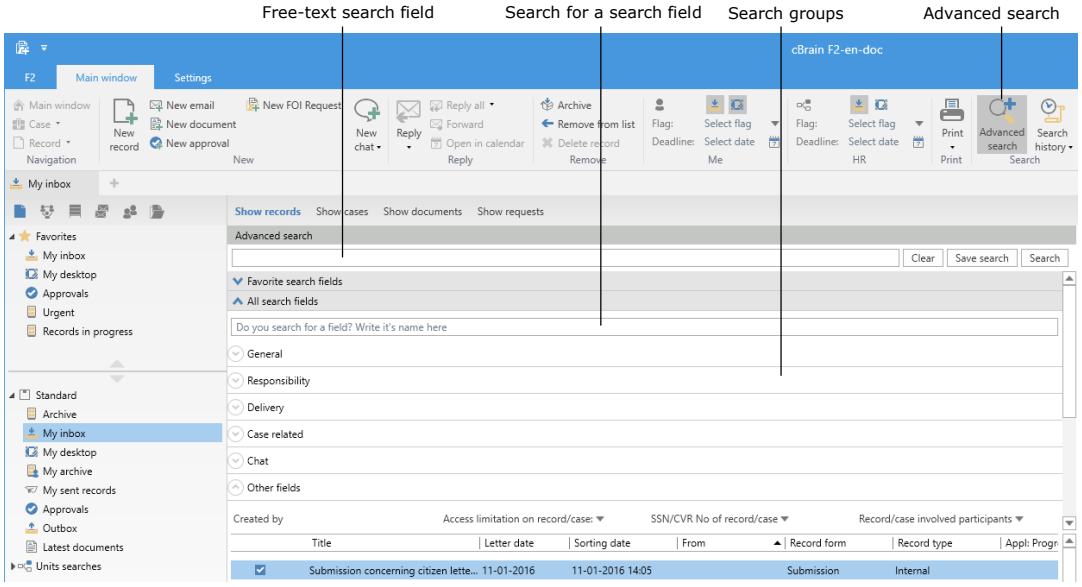

Figure 5: Advanced search

It is possible to search for a specific search field by entering a search string in the field above the search groups. F2 will then show all search fields in which the search string appears. Pressing **Enter** is not required.

The search fields are divided into groups. The user can click on a search group to expand it and view its search fields. See the figure below.

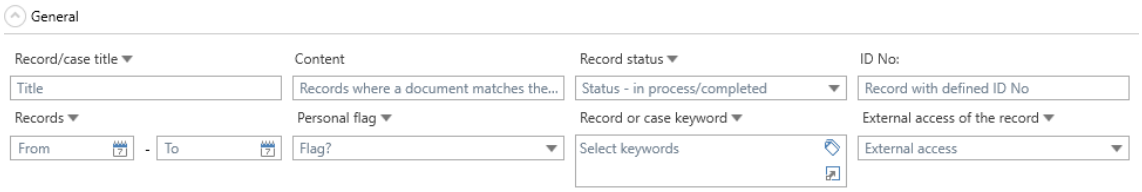

Figure 6: The "General" search group

A field with a drop-down arrow ▼ next to its title allows the user to choose between certain values.

For example, under "Record status" the user can choose whether to search for records with the status "In progress" or "Complete". The search field can also be left empty.

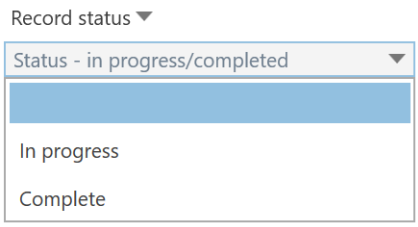

Figure 7: Search options for the "Record status" field

Note: A search for a user or unit can be performed in the following ways:

- By typing the name of the user or unit in the search field.
- By clicking on the icon in certain search fields to find the user in F2's "Participant register".
- By clicking on the icon in certain search fields to find the unit in F2's "Participant register".

When the desired fields in one or more search groups are filled in, click **Search** next to the free-text search field or press **Enter** to display the results of the search.

Note: Before a search is performed, it is important to delete previously defined searches from the search fields. This can be done by clicking **Clear**.

Filled-in search fields are highlighted

If one or more fields in a search group is filled in, its title will be highlighted in bold. This makes it easier to determine which fields are filled in when the groups are collapsed.

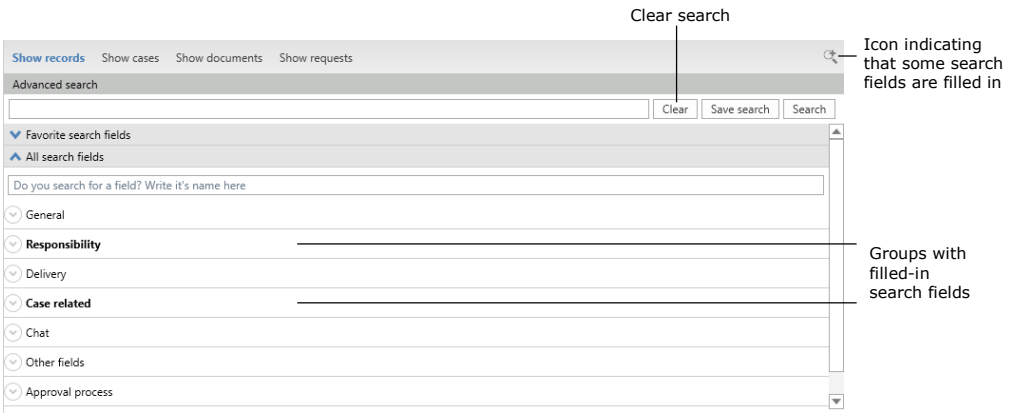

Figure 8: Search field groups

The advanced search icon is shown above the search fields, if any are filled in. The icon indicates that there are filled-in search fields, also if the user has deselected "Advanced search" to hide the search groups. Clicking on **Advanced search** displays the search fields once more. Entered search strings can be removed by pressing **Clear**.

Search groups

The metadata search fields are divided into groups. The number of groups may vary according to add-on modules to the F2 installation.

The user can perform searches with operators in the search fields. For more information on the available search operators, refer to the section *Search using operators*.

The metadata fields of each group are presented below.

The "Favourites" search group

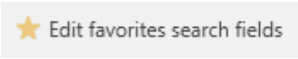

Figure 9: Menu item "Edit favourites search fields"

Users can create a search group with their personal favourite search fields.

This is done by clicking on **Edit favourites search fields** in the main window ribbon.

A dialogue with a wide range of predefined search fields will open. Click on **Records** on the left side of the dialogue. Tick off fields to add them to the favourite search group as shown below.

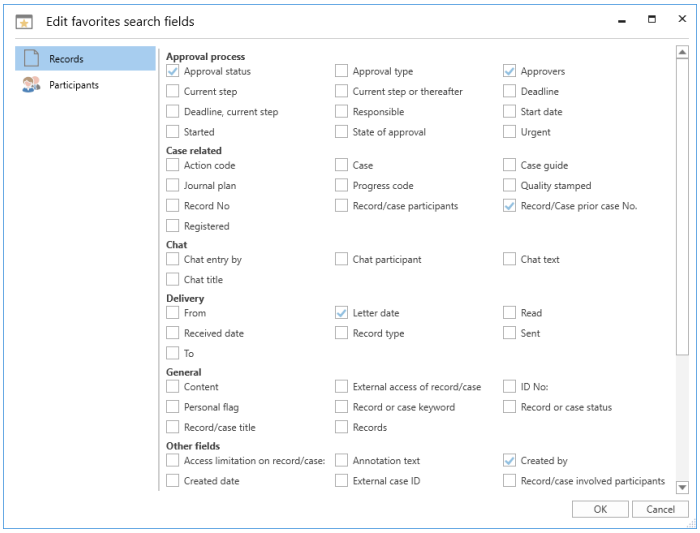

Figure 10: "Edit favourites search fields"

The ticked-off search fields are now included in the search group "Favourites" as shown in the example below.

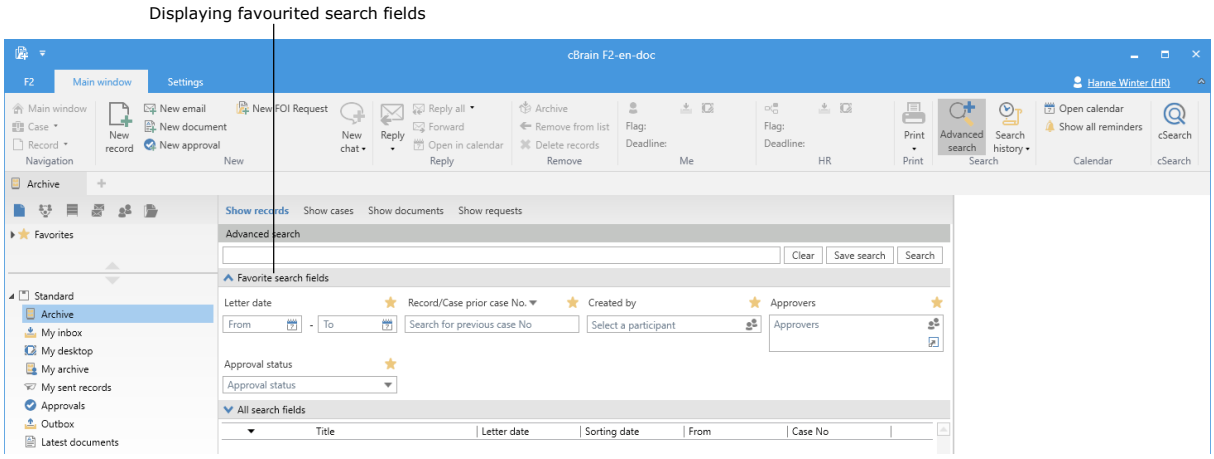

Figure 11: Example of the "Favourites" search group

The user can also add search fields to favourites when viewing a search group. To do this, hover the mouse over a search field to make a grey star appear. Click on the **grey star** to add that search field to favourites. The star turns yellow. Click the **yellow star** to remove the search field from favourites.

The "General" search group

Search field	Possible values	Comment
"Record/case title"/ "Record title"/"Case title"/"Current record title"	Search string	A search is performed for records or cases whose title contains the search string. "Record/case title": • Search for the current record or case title. • For email records, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email record. "Record title": • Search for the current record title. • For email records, F2 searches both for the original title and the new title, if any. The search result will display the current title of the email record. "Case title": Search for the case title. "Current record title": Search for the record's current title only.

Search field	Possible values	Comment
		Note: The search field ”Current record title” is only displayed if it has been enabled in cooperation with cBrain.
“Content”	Search string	Search for records with attachments whose content matches the search string.
“ID No”	Number	Search for records with a specific ID number.
“Record or case status”/“Record status”/“Case status”	In progress/ Complete	Search for records based on whether they are in progress or completed.
“Records”/“Mine”/ “Unit:”/“Deadline, case handling”/“Cases”/ “Records and cases”	Date or one of the special values *Yesterday, Today, Tomorrow,* or *Undefined*. It is also possible to use + and –. Searches for records with the specified deadline specified in the input field. Dynamic searches. If an end date is not specified, the search will include results from the start date and onwards.	Records and/or cases whose deadline is within the specified interval. Records and/or cases with the user’s personal deadline within the specified interval. Records and/or cases with the unit’s case management within the specified interval. Records and/or cases with the unit’s deadline within the specified interval.
“Personal flag”/“Unit flag”	Flags, a value list managed by an administrator.	Search for records with the specified flag.
“Record or case keyword”/“Record keyword”/“Case record”	A certain keyword. A keyword within a specific subject.	Search for keyword(s) specified on the record or case. Makes it possible to create lists

Search field	Possible values	Comment
	A keyword or subject which contains a specific text.	based on a certain keyword.
"External access of the record/case"/ "External access of the record"/ "External access of the case" (add-on)	Undefined/Open/Partly open/Closed	Search for records shared with external parties via the add-on module "F2 External access".

The "Responsibility" search group

Search field	Possible values	Comment
"Record/case responsible"/"Record responsible"/"Case responsible"	User/Unit/Me/My unit	Search for records or cases for which the specified user or unit is responsible. Entering "Me" performs a search for the current F2 user. If the responsible part is set to "Me" and this search is made available to several users, F2 identifies "Me" as the user performing the search.
"Seen"	Yes/No	Search for records marked as seen on the "Unit registration line".
"Unit responsible for case/record"/ "Unit responisble for record"/"Unit responsible for case"	Responsible unit/My unit	Search for records/cases for which the specified unit is responsible. *My unit* is the unit to which the current user belongs.
"Record/Case suppl. case mgr."/"Record suppl. case mgr."/"Case suppl. case mgr.	User/Me	Search for records/cases for which the specified user is set as supplementary case manager. This option can be used for finding records for

Search field	Possible values	Comment
		which the user is supplementary case manager and for records on whose case the user is supplementary case manager. It is possible to search for either one of the options or for both.
"Record/case suppl. units"/"Record suppl. units"/"Case suppl. units"	Unit/My unit	Works as the preceding search, except this search is for records and cases for which a unit is set as supplementary case manager.
"Case work"	User/Unit/Me/My unit	Search for records for which the specified unit/user is specified in the unit registration line.
"Receiver seen"	All/Some/Not all/Nobody	This field makes it possible to sort search based on whether the recipient(s) has/have seen the record/email. **Note**: Only applies to unit registration.
"Access"	Undefined/Involved/ Unit/All	Search for records by the specified access level.

The "Delivery" search group

Search field	Possible values	Comment
"From"	Participant/User/Unit/ Me/My unit/email address	Search for emails sent by the specified participant, user or unit. the participant register.
"To"	Participant/User/Unit/ Me/My unit/email address	Search for emails received by the specified participant, user or unit.
"Sent"	Yes/No	Search for emails based on whether they have been sent.
"Record type"	Undefined/Inbound/ Outbound/Internal	Search for records sent to or received from external participants, or records for internal use.
"Read"	Yes/No	Search for emails based on whether they have been read.
"Received date"	Date or one of the special values *Yesterday*, *Today*, Tomorrow, or *Undefined*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for a date or an interval within which an email has been received. Using *Yesterday*, *Today*, or *Tomorrow* launches a dynamic search based on current date. Undefined = no date of receipt.
"Letter date"	Dates/Intervals. If an end date is not specified, the search will include results from the start date and onwards.	Similar to the "Received date" field. This search is for date of letter and not by date of receipt.

The "Case related" search group

Search field	Possible values	Comment
"Case"	Search string, case number or *Undefined*	Searching for *Undefined* will display records not added to a case. F2 automatically suggest case titles when the user starts typing in this field. A case can also be selected via the case icon.
"Registered"	Yes/No	Search for cases attached to records based on whether they have been registered.
"Record No"	Record number or *Undefined*	A record is automatically assigned a number when it is on a case that is registered.
"Record/case prior case No."/"Record, prior case No."/"Case, prior case No."	Case number or *Undefined*	Search for records or cases via a previous case number.
"Record/case participants"/"Record participants"/"Case participants"	Users/Units/External participants	Search for cases in which the specified users/units/external participants are involved.

Search field	Possible values	Comment
		Note: A system configuration managed by cBrain is available to further specify the search. If this setting enabled, the icons and appear in this field. Click on (union) to show records/cases in which at least one of the specified participants. Click on (intersection) to show the records/cases in which all the specified parties appear.
"Journal plan"	Values in the journal plan list, set up by an administrator	Search for cases matching the specified journal plan.
"Action code"	Action codes, set up by an administrator	Search for cases with the specified action code.
"Case guide"	Predefined case guides	Search for number of cases with the specified case guide.
"Progress code"	Pre-defined progress codes assigned to cases	Search for applied progress codes.
"Quality stamped"	Yes/No	Search for cases based on whether they have been quality assured.

The "Chat" search group

Search field	Possible values	Comment
"Chat text"	Search string	Search for chats containing the specified search string.
"Chat participant"	User/Me	Search for chats in which the specified user is a participant. **Note**: Search results will only include chats in which the user performing the search is a participant.
"Chat title"	Search string	Search for chat titles containing the specified search string.
"Chat entry by"	User/Me	Search for chat messages written by the specified user. **Note**: Search results will only include chats in which the user performing the search is a participant.

The "Other fields" search group

Search field	Possible values	Comment
"Record or case created by"/ "Record created by"/"Case created by"	User/Unit/External participant	Search for records/cases created by the specified user/unit/external participant.
"Record or case created"/"Record created"/"Case created"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*, or *Undefined.* It is also possible to use + and –. If an end date is not specified, the search will include results from the	Search for records and/or cases created within the specified interval.

Search field	Possible values	Comment
	start date and onwards.	
"Access limitation on record/case:"/"Access limitation on record:"/"Access limitation on case:"	Security group/ Unit/Team/User	Search for records and cases with an access limitation.
"SSN/CVR No of record/case"/"SSN/ CVR No of record"/"SSN/CVR No of case"	SSN/CVR number	Search for records and/or cases with the specified SSN/CVR number.
"Record/case involved participants"/"Record involved participants"/"Case involved participants"	User/Unit/External participant	Search for documents and/or cases with the specified user/unit/external participant as a participant involved in the record/case.
"External case ID"	Case number	Search for records with the specified external case ID.
Standard-search	Predefined searches created by an administrator	Predefined searches are available in this field.
"Reminder date"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*, or *Undefined.* It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for records with a reminder date within the specified interval.
"Annotation text"	Search string	Search for annotations containing the specified search string.

The "Approval process" search group

Search field	Possible values	Comment
"Responsible"	User/Unit/Me/My unit	Search for approvals for which the specified user or unit is responsible.
"Approvers"	User/Me	Search for approvals for which the specified user is the approver.
"Current step"	The approver on the current step	Search for records with the specified approver for the current approval step.
"Current step or thereafter"	Approver on the current step or thereafter	Search for records with the specified approver for either the current or a pending approval step.
"Deadline"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*, or *Undefined*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for approvals with deadlines within the specified interval.
"Deadline, current step"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*, or *Undefined*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for approvals with current step deadline within the specified interval.

Search field	Possible values	Comment
"Start date"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*, or *Undefined*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for approvals that have been initiated during the specified interval.
"Urgent"	Yes/No	Search for approvals with or without urgent status.
"Approval type"	Value list created by an administrator.	Search for approvals of the specified type.
"Started"	Yes/No	Search for approvals that either have or have not been initiated.
"Approval status"	In process/Completed/ Cancelled	Search for approvals that are either in process, completed or cancelled.
"State of approval"	Returned/Approved / Conditionally approved	Search for approvals that have either been returned, approved or conditionally approved.

The "Request" search group

Search field	Possible values	Comment
"Creator"	User/Unit/Me/My unit	Search for requests created by the specified user/unit.
"Type"	Predefined request types managed by an administrator	Search for requests based on type.
"Deadline"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for requests with a specific deadline. Using - and + it is possible to perform a dynamic search. Entering e.g. +7 will always search for deadlines seven days from the current date.
"Internal deadline"	Date, interval or one of the special values *Yesterday, Today, Tomorrow*. It is also possible to use + and –. If an end date is not specified, the search will include results from the start date and onwards.	Search for requests with a specific internal deadline. Using - and + it is possible to perform a dynamic search. Entering e.g. +7 will always search for deadlines seven days from the current date.
"Description"	Search string	Search for requests whose description contains the specified search string.
"Recipient"	Users/Unit/Me/My unit	Search for requests sent to the specified user/unit.
"Executor"	Users/Unit/Me/My unit	Search for requests for which the specified user/unit is the executing party.
"Executed"	Yes/No	Search for requests that either have or

Search field	Possible values	Comment
		have not been executed.
"Return to"	User/Unit/Me/My unit	Search for requests to be returned to the specified user/unit.
"Approved"	Yes/No	Search for requests that either have or have not been approved.

The search result view

The results of any search are displayed in the results list in F2's main window. The user can choose to view the results list as a list of records, cases, documents or requests. In the example below the results list is displayed as records.

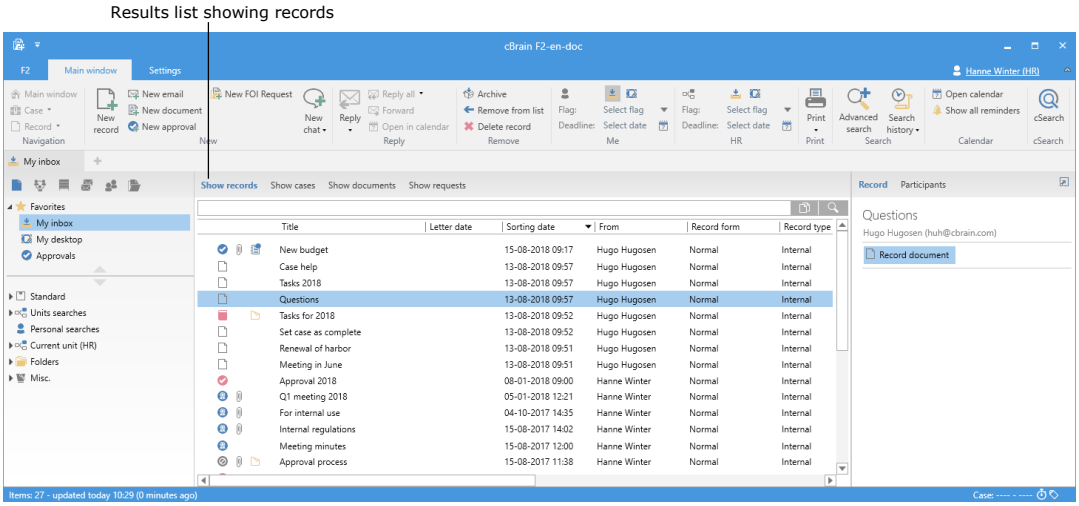

Figure 12: Results list showing records

> **Note**: The user can navigate a finished search by entering a search string. If a search is done and sorted by e.g. the "Title" column, the user may enter text in the free-text search field (without pressing Enter), and F2 will jump to the first list result matching the user's text.

View records, cases, documents or requests in the results list

The user can choose to view the results list as either records, cases, documents or requests. This is done by clicking on the desired view above the free-text search field in the main window.

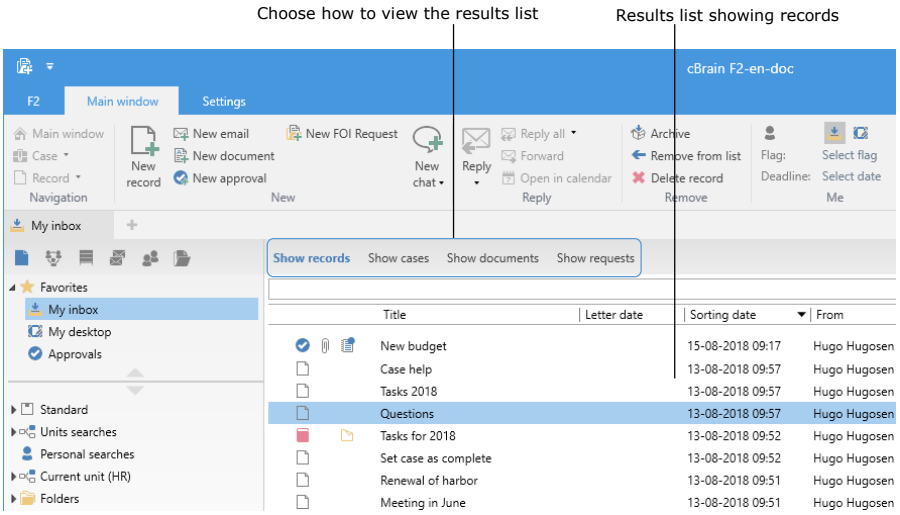

Figure 13: View the results list as records, cases, documents or requests

Note: Not all records are associated with a case. Records that are not assigned to a case will not be visible when the user chooses the "Show cases" view.

Show records

Select **Show records** to display records in the results list. The results list consists of all records that match the user's search criteria.

It is possible to view any attached documents by clicking on to the right of the record icon as shown below.

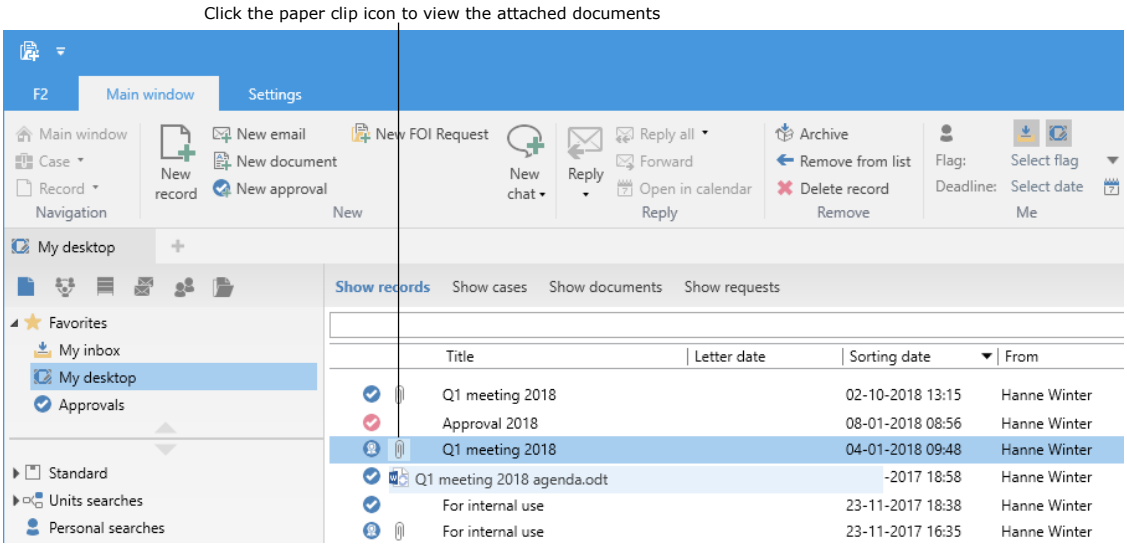

Figure 14: View records with attached documents

Show cases

Select Show **cases** to display cases in the results list. Records associated with a case are displayed in the search list view to the right of or below the case list as shown below.

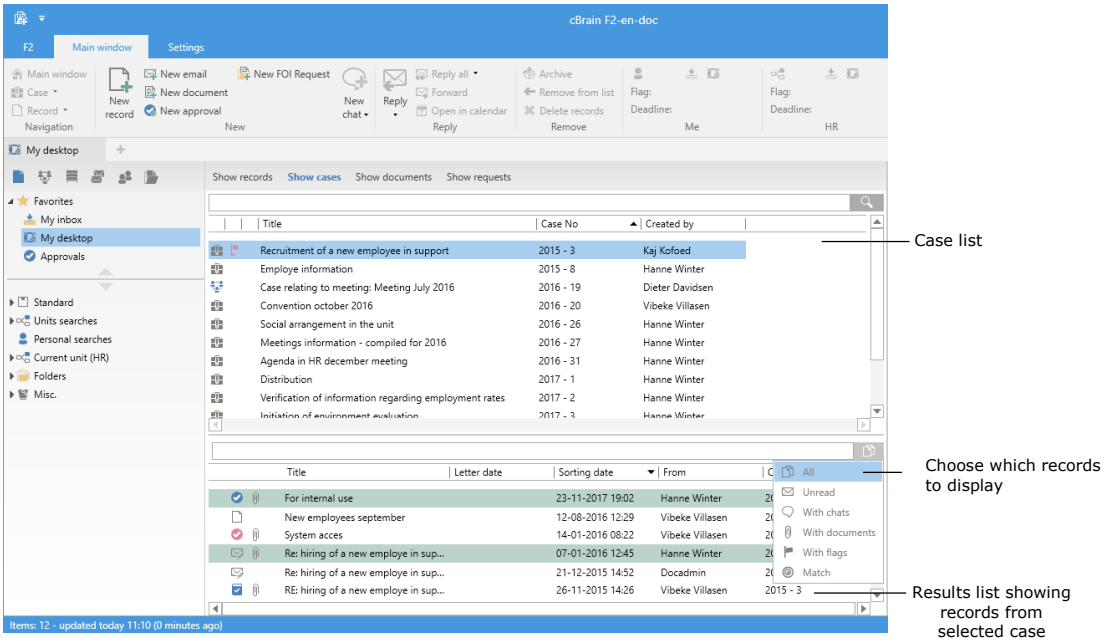

Figure 15: Case and records lists displayed in the results list

Note: Certain conditions apply to this view:

1. Only cases with records that match the search are displayed. Records without a case will <u>not</u> be displayed, even if they match the list or the search criterion.
2. Next to the case list's free-text search field, it is possible to select which case records to display. Selecting "All" (as shown in the example above) displays all records in a case including ones that do not meet the search criteria.
3. The records that meet the search criteria will appear with a green background (as shown in the example above). Selecting "Match" displays only those records in the case list that match the search criteria.

Show documents

Select **Show documents** to display documents in the results list. A padlock icon is displayed if a document is locked. A locked document cannot be edited. A document may be locked if it is attached to an email or if the responsible user has chosen to prevent it from being updated.

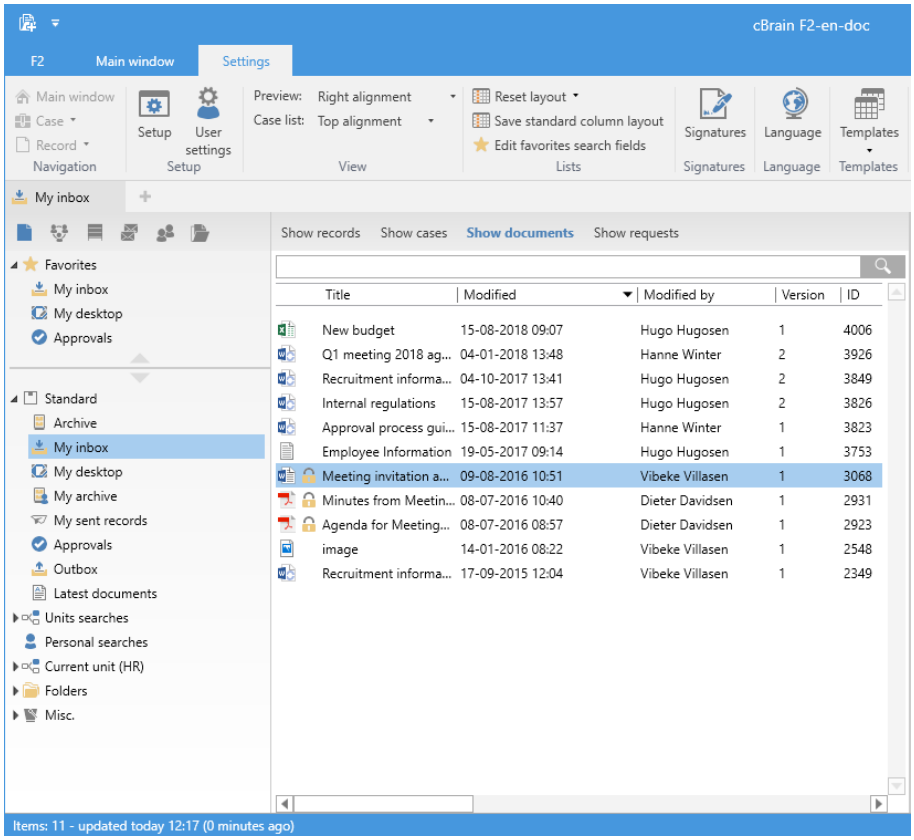

Figure 16: Show documents in the results list

Double-clicking on **a selected document** opens the document directly while the associated record is opened in the background.

The results list displays all documents attached to records matching the search criteria. If a record has multiple documents attached, they will all be displayed as long as at least one matches the search criteria.

Show requests

Select **Show requests** to display requests in the results list.

Double-clicking on a **request** opens its record. If there are several requests on the same record, it will appear several times in the list, since only one request is displayed per line.

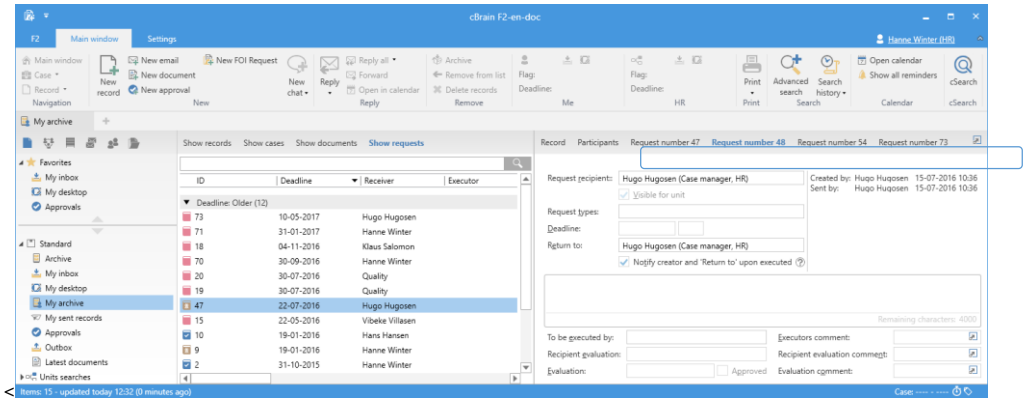

Figure 17: Display requests in the results list

Additional filters

Additional filters that can be used in the results list are “All”, “Unread”, “With chats”, “With documents” and “With flags” as shown below.

Click the icon to view the filter options in a drop-down menu. See the figure below.

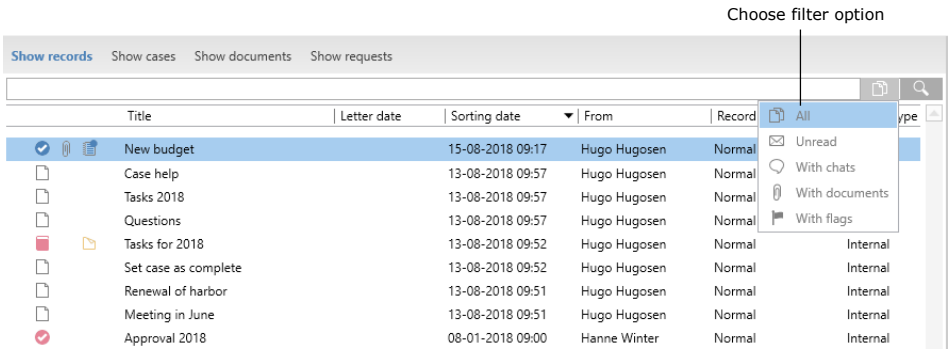

Figure 18: Filter options in the results list

The table below describes each search filter option.

Filter	Function
“All”	Standard view that shows all results from the search.
“Unread”	Shows unread search results.
“With chats”	Shows records with chats.
“With documents”	Shows search results with documents attached.
“With flags”	Shows search results marked with a flag.

Sorting the search results

All search results that are generated by searching for metadata or using the free-text search field are sorted using columns.

As when sorting the inbox and other lists, the user chooses how to sort the list by **clicking on a column**. Each column can be sorted in ascending or descending order.

F2 lets the user sort by two columns at once. First, click on a desired column to sort by. Then press and hold the Shift button and click on a second column by which to sort the search results.

F2 remembers which column the user last used to sort each list. All lists are individually sorted.

Columns

The table below describes each column in the results list and its use.

The number of columns may vary from installation to installation. Several of the listed columns may only appear if the installation has one or more add-on modules.

The columns available may depend on whether the user has chosen to show records, cases, documents or requests.

For further information on setting up columns, see the *F2 Desktop – Settings and setup* submanual.

Column	Purpose
"Access"	Shows the access limitation for a record.
"Active FOI Request icon" (add-on)	Displays the ➔ icon. The icon shows the record containing the most recent PDF-generated FOI request report. This column is intended to be shown to the left of the "Title" column, making the arrow icon point to the relevant record.
"Annotations"	Displays the number of annotations on a record.
"Appl: Days left"	Displays the time in days until a deadline for the approval of a record expires.
"Appl: Progress"	Displays a colour coded overview of the approval progress with the current approver highlighted in blue. Any previous approvers are highlighted in light blue, while future approvers are grey. The users set as approvers can be identified by their initials. The user's own initials are displayed in bold.

Column	Purpose
"Approval deadline"	Displays the deadline for the approval.
"Archive area"	Shows whether the record is located in: • "Archive" • "Library" • "My deleted records" • "My private records".
"Attached file icon"	Displays the icon on any records with documents attached.
"Bcc"	Displays any Bcc recipients of an email.
"Case folder"	Displays the case folder in which the record is placed.
"Case help"	Shows whether case help is activated on a record.
"Case keyword"	Displays any keywords associated with a case. **Note**: If the results list is showing records, this column displays the keywords of the case on which a record is placed.
"Case No."	Shows the number of the case on which a record is located. **Note**: If the results list is showing records, this column displays the number of the case on which a record is placed.
"Case title"	Displays the title of the case.
"Cc"	Displays any copied recipients (Cc) on a record.
"Created by"	Displays the user that has created the record.
"Request reply date"	Displays the time when a request has answered, i.e. the time when the reply record been sent.
"Date created"	Displays the date automatically allocated to a record when it is created.
"Deadline"	Displays the formal deadline of a record.

Column	Purpose
"Deadline, the unit's case handling"	Displays the deadline a recipient unit has set for its own management.
"Deleted by"	Displays the user who has deleted the request. **Note**: This column only contains values if the chosen list is either "My deleted records" or "Search all over".
"Document locked"	Shows whether the documents attached to a record have been locked for editing.
"E-mail title"	Displays the original title of an incoming email.
"External access" (add-on)	Shows whether external sharing of a record is: • Open • Partially open • Closed. **Note**: This setup can be customised and may vary from organisation to organisation.
"Forward of record"	Displays the title of the forwarded record.
"From"	Displays the sender of records containing sent or received material. **Note**: In case of scanned letters, it is possible to edit the record recipient so the column shows the original sender.
"Icon"	Displays icons for, respectively: Record Email Request Approval
"Keywords"	Displays the keywords associated with the record.
"Latest update"	Displays the time of the most recent change in a record, the metadata of a record or the documents

Column	Purpose
	of a record. These changes are also found in the history of the record. **Note**: "Latest update" should not be confused with "Sorting date".
"Letter date"	Displays the letter date registered in the record. In case of scanned letters, this should indicate the actual letter date.
"Location"	Displats the current location of an approval (add-on module).
"Locked"	Displays whether a case is included in the periodic delivery to the National Archives. **Note**: The period shift function (ongoing delivery) to the National Archives is active only if the technical service called period shift is enabled. Therefore, it is not possible to select the value, it can only be searched for.
"Mail received date"	Displays the registered receipt time of incoming letters and emails. **Note**: In case of scanned letters, it is possible to edit the record date. In case of emails, the date is set automatically by F2.
"Message icon"	Shows the icon for: • Chat • Note • Annotation • Orientation Only one icon is displayed per record, and the more formal icon takes precedence. If the record has a chat and a note, the note icon is displayed. If the record has an annotation as well, the annotation icon is displayed.
"My deadline"	Displays the deadline the user has allocated to the record via personal management in the menu item "Deadline".
"My flag"	Displays the flag the user has allocated to a record via personal management in the menu item "Flag".

Column	Purpose
"My unit deadline"	Displays the deadline the user has allocated to the record via unit management in the menu item "Deadline".
"My unit flag"	Displays the flag the user has allocated to a record via the unit management in the menu item "Flag".
"Original file path"	Displays the path used as the basis for a record if the record has been imported via document import from a server. This way it is possible to see where the underlying document for the record was located before being imported.
"Previous case No."	Indicates the previous case number for the record or case. The number can originate from a different system or from a case in F2. The field can also be filled in manually.
"Rec.ID"	Displays the ID (key) that is automatically allocated to a record when created.
"Record form"	Displays what kind of record it is. The available kinds of record varies from installation to installation.
"Record number"	Displays the consecutive number allocated to a record when it has been registered. **Note**: A record that is registered has only one record number. The record number should not be confused with the record ID.
"Record type"	Shows whether the record is: • "Internal" – i.e. available to internal users • "Incoming" – i.e. received from external participants • "Outgoing" – i.e. sent to external participants
"Registered"	Shows whether a record has been registered. **Note**: This column is empty if the record's "Registered" field has not been filled in.
"Remind Date"	Displays the date set by a user for management purposes. **Note**: The reminder date does not pop up as a reminder but can be used as a basis for searching or sorting lists.

Column	Purpose
“Reminder icon”	Shows whether there is a reminder on a record.
“Reply to record”	Displays the title of the record to which a specified record is a response.
“Request”	Shows whether there is a request on a record.
“Request completed”	Shows whether the record’s request has been marked as completed.
“Request created”	Shows the date and time for the creation of the request.
“Request created by”	Displays the user who created the request.
“Request deadline”	Displays the deadline for the request set by the creator.
“Request execution date”	Displays when a request was executed.
“Request executor”	Displays the user or unit that executes a request on a record.
“Request, internal deadline”	Displays the request recipient’s own deadline.
“Request recipient”	Displays the user or unit set as the request recipient.
“Request reply date”	Shows when a request has been replied to (when the answer record was sent).
“Request sender”	Shows the name of the user who sent the request.
“Request sent”	Shows the date and time for when the request was sent.
“Request status”	Shows whether the request is: • Sent • Accepted • Cancelled • Executed • Completed
“Request text”	Displays the content of the text field of the request.

Column	Purpose
"Request type"	Displays the request type. **Note**: Request types may vary from organisation to organisation as the types are configured on an organisational level.
"Responsible"	Displays the user or unit responsible for the record.
"Responsible unit"	Displays the unit responsible for the record. **Note**: If the responsible party a user, the column displays the unit with which the user is associated.
"Responsible, the units case handling"	Displays the user who is formally responsible for the recipient unit. **Note**: If the user responsible for the record has not yet been specified, the recipient unit will be displayed as the responsible party.
"Secure email"	Shows whether the user has selected "Send securely" when sending the record to external recipients.
"Sent"	Shows whether the record has been sent. The field changes automatically from "No" to "Yes" when the "Sent" function is used and for incoming emails. This field makes it possible to filter out unsent draft records for which sender and recipient have been filled.
"Sorting date"	Displays when a record has been placed in a user's personal lists such as "My desktop", "My inbox" and "My archive". The sorting date of a record in one of the personal lists is only affected by the changes that would cause the record to be added to the given personal list, in which it is already placed. For example, if a chat on a record, which is already in the user's inbox, is sent to the user, the sorting date will be updated. The last updated date in this example will not change. **Note**: In the lists or searches with no personal management of the individual users, the sorting date is the same as the "Latest updated" date of the record.

Column	Purpose
"SSN/CVR No"	Shows the SSN/CVR number a user has written in the record.
"Status"	Shows whether the record has been formally completed or is still being processed. It is still possible to edit a record which status has been set to "Complete". A case can only be set as "Complete" if all its associated records have been set to "Complete" as well.
"Suppl. case mgr."	Shows the supplementary case managers on a record or case.
"Task guide type"	Shows the case guide type set in a case. **Note**: If the results list is displayed as records, the column indicates the case guide of the case, in which a certain record is placed.
"Title"	Shows the title a user has allocated to a record.
"To"	Shows the recipient of a record containing sent or received material. **Note**: If the field is filled in manually, when F2 contains sent and received letters that have been scanned, the column also shows the recipient of the scanned letters.
"Urgent"	Shows whether an approval has been marked as urgent.
"Version No"	Shows the version number of the record.

Auto grouping

Using auto grouping, it is possible to group F2's results list based on a selected column.

Click on **Auto grouping** in the "Settings" tab to enable or disable auto grouping.

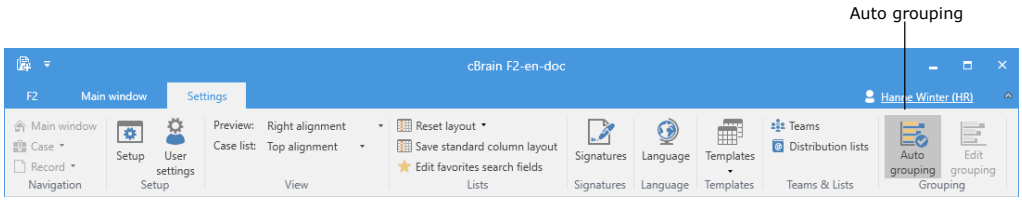

Figure 19: "Auto grouping" in the "Settings" tab

If its menu item is dark grey, "Auto grouping" is enabled.

Figure 20: "Auto grouping" enabled

If its menu item is light grey, "Auto grouping" is disabled.

Figure 21: "Auto grouping" disabled

Each subgroup header displays the number of items it contains as well as the number of unread items. This applies to both the main and case windows.

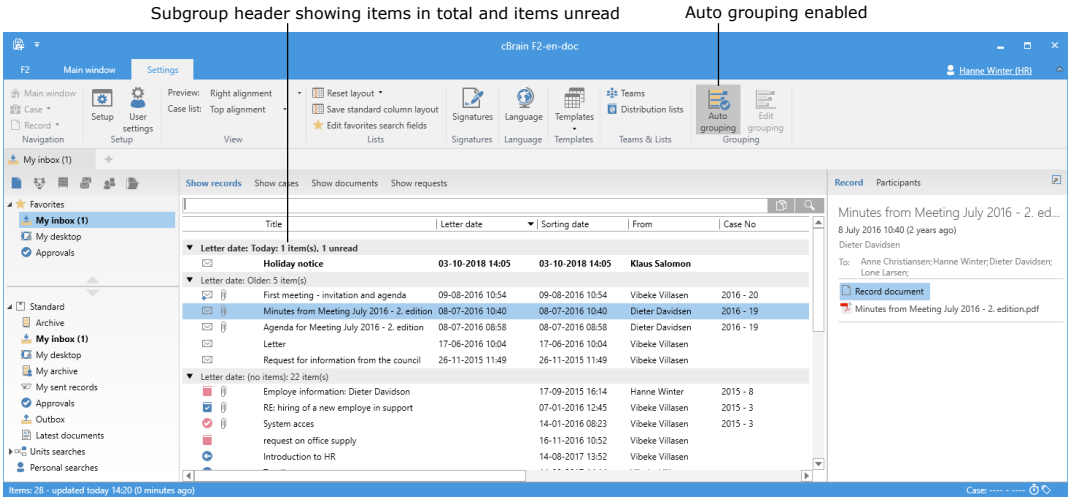

Figure 22: Auto grouping enabled in the main window

It is possible to set a future date as the letter date on a record. This may be useful if a case manager has written a letter before it has to be sent. In the result list, a "Future" subgroup allows the user to keep track of records with a future letter date. The "Future" subgroup will appear as the top group in the results list when the results are sorted by letter date.

Edit grouping

The standard columns in the results list are chosen during the configuration of F2. Users can also the results list by creating their own grouping of columns.

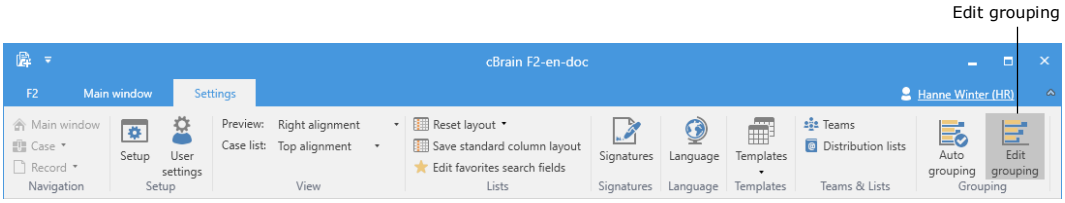

Figure 23: "Edit grouping" in the "Settings" tab

Click on **Edit grouping** in the "Settings" tab to view group headers in the results list.

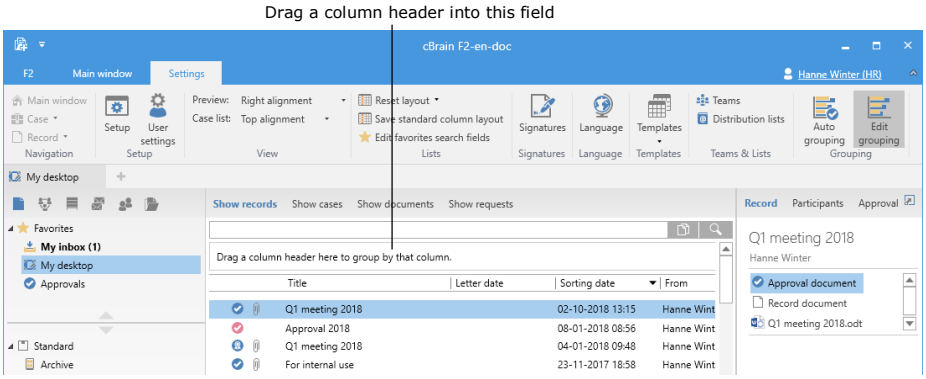

Figure 24: The grouping area

The results are grouped by dragging the desired column header to the grouping field, thereby creating a folder structure as shown below.

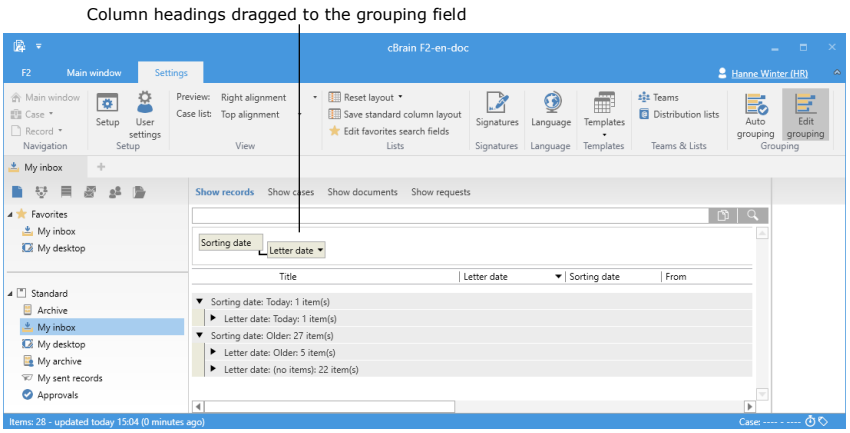

Figure 25: User-created folder structure

Note: Grouping into several levels is possible by dragging several column headlines into the grouping field.

To remove the subgroup headers as well as the grouping option, click **Edit grouping** again or drag the chosen column header back down to the results lists.

The menu item “Edit grouping” is active only when “Auto grouping” is disabled.

Note: Any user-created folder structures will be removed when the user selects “Auto grouping”.

Saving a search

It is possible to save a search so it is easy to perform again. To do this, click **Save search** when "Advanced search" is enabled.

When the "Save new personal search" dialogue appears, click **OK** to save the search to "Personal searches" in the main window.

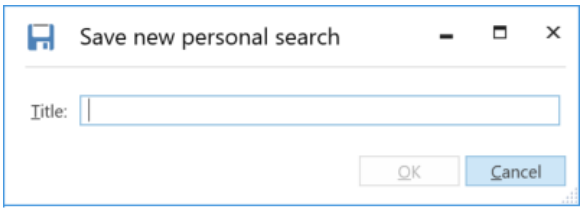

Figure 26: To save a search, enter a title

If the user has the "Search administrator" privilege, the saved search can be made available to a unit or added as a fixed search for the entire organisation. For further information, refer to the *F2 Desktop – Administrator manual*.

Personal searches are useful for creating lists of frequently used records, keywords or flags, or for providing the user with a better overview. Saved personal searches are dynamic, which means that new records or cases that meets the search criteria are automatically added to the list.

In the figure below, a user has saved a personal search and added it to his favourites. When the cursor is hovering over the list (on the left side of F2's main window), its search criteria are displayed.

In this example the search criteria are "FLAG ("Personal: Urgent")" and "RESPONSIBLE("Me")". The user can click on the list to display all records for which he is responsible and has set his personal "urgent" flag.

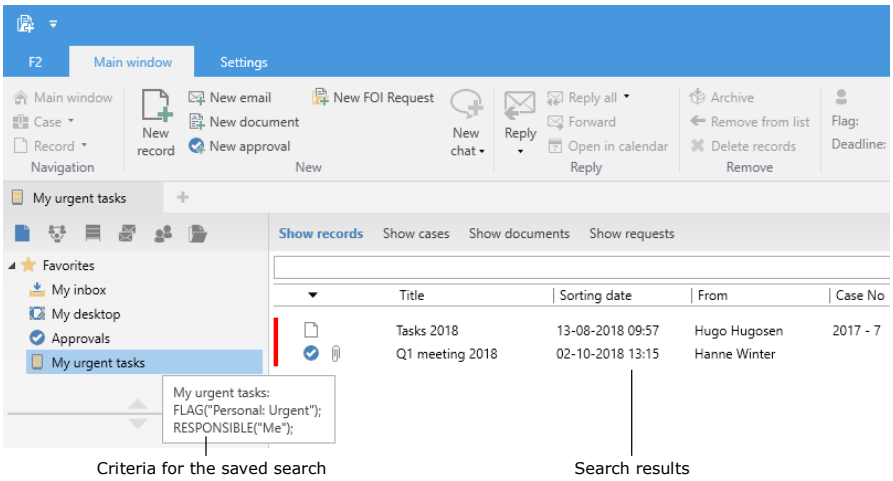

Figure 27: A saved search as a list

Personal searches, also called personal lists, are displayed under the node "Personal searches" in the list view. The icon to the left of a personal search indicates where the list performs its search.

The correlation of the icons with the lists is as follows:

	Archive
	My inbox
	My desktop
	My archive
	My private records
	My deleted records
	Library
	Search all over

Figure 28: The icons indicate from where a search was created

Search lists can retain the search field view

The search lists can remember if the search fields were displayed or hidden the last time a list was shown. When a list is chosen on the left side of the main window, the search fields will appear in the same way as when the list was last viewed.

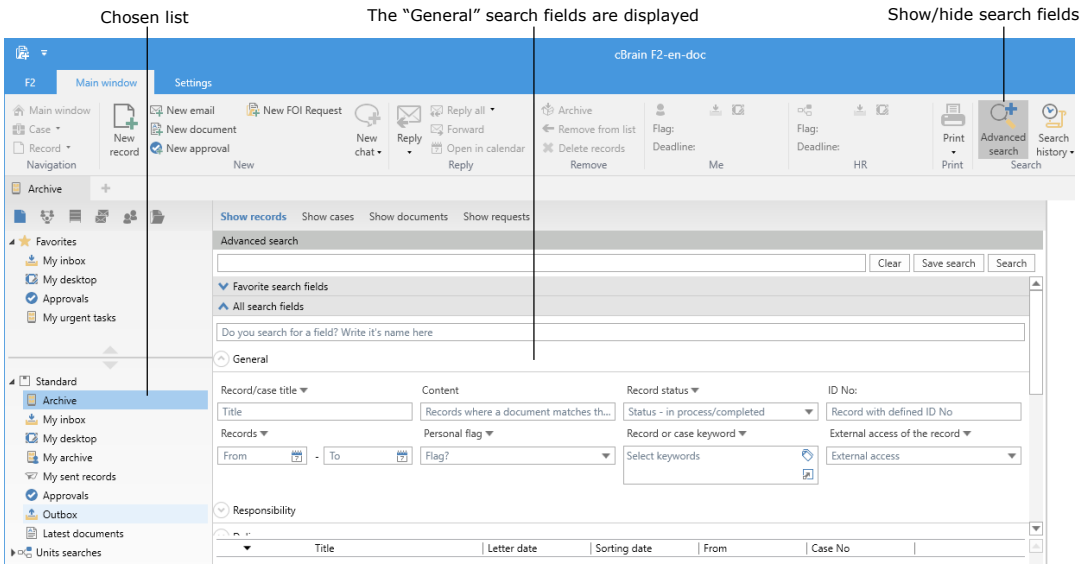

Figure 29: Search fields displayed in the result list

It is always possible to display or hide search fields by clicking the **Advanced search** button in the main window ribbon.

The option to retain search fields is found in the "Settings" tab. Choose the menu item "Setup" and when the dialogue box opens, click on the "Main window" tab. Tick or untick the box "Always hide my search fields when I change lists" to select the preferred search field display option.

For more information about personal settings in F2, see the user manual *F2 Desktop – Settings and setup*.

Naming of searches performed in unit lists

When a user performs a search in a unit's inbox, desktop or archive, F2 does not automatically remember from which unit's list the search was performed. It is up to the user to give the search a title that takes the name of the unit into account.

The reason for this is that a user can be associated with multiple units, and F2 does not automatically show the unit list in which the search was performed. This applies to both personal searches and when a user with the "Search administrator" privilege performs searches on a unit level.

For example:

Hugo Hugosen has several job roles and thus access to the inboxes, desktops and archives of several units, including the HR unit. Hugo now performs a search in HR's inbox using the search criterion: record manager = Hugo Hugosen.

Hugo saves his search, but since F2 does not save the unit list from which the search is performed, Hugo should not name the search "Records in the unit's inbox with me as manager". This title is too general and does not show Hugo in which unit the search is performed. Instead, Hugo saves and names the search, "Records in HR's inbox with me as manager".

Note: Personal searches (e.g. searches in "My inbox", "My desktop" and "Archive") correspond to user's current unit. This also applies to the unit's flag, deadline, read/unread, etc.

Deleting and renaming personal searches

A personal search can always be deleted or renamed. **Right-click** on a personal search to open the menu shown below.

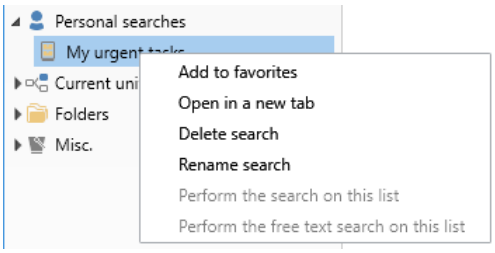

Figure 30: Delete or rename a personal search

Search for participants

F2's participant register contains the internal and external contacts of the organisation as well as the user's private contacts.

To open the participant register, click on (the contacts icon) on the navigation line above the lists and folders on the left side of the main window. The participant register will be displayed in the results list as shown below.

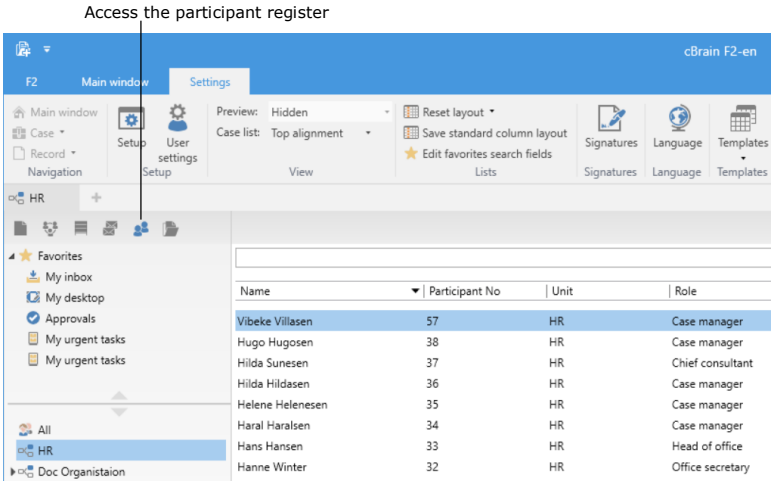

Figure 31: Access the participant register from the main window

> **Note**: The menu icon switches changes its colour from to when the particpant register is open.

With the participant register open, click on the **desired node** in the list view to see its associated contacts.

To perform a search in the participant register the user must click on the magnifying glass or press **Enter**. Contrary to clicking on Archive in the main window's list view, a search is not performed automatically when clicking on **All** (i.e. all contacts in the participant register).

It is only when the user clicks on the magnifying glass next to the free-text search field that F2 performs a search in the participant register.

A general search in the participant register can be performed by entering the search term in the free-text search field while search groups can be utilised for more specific searches. Read more about this in the next section.

Performing a search

To perform a search in the participant register, click on **the node** in which you would like to perform a search.

Available nodes:

- All contacts
- The organisation's authority and units
- External contacts
- Private contacts.

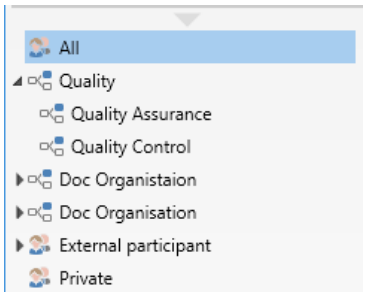

Figure 32: Nodes of the participant register

When a node has been chosen, the user performs the search either via the free-text search field or by clicking on **Advanced search** in the main window ribbon.

Clicking on **Advanced search** opens a drop-down menu of search groups in which it is possible to search for specific metadata.

See the example below.

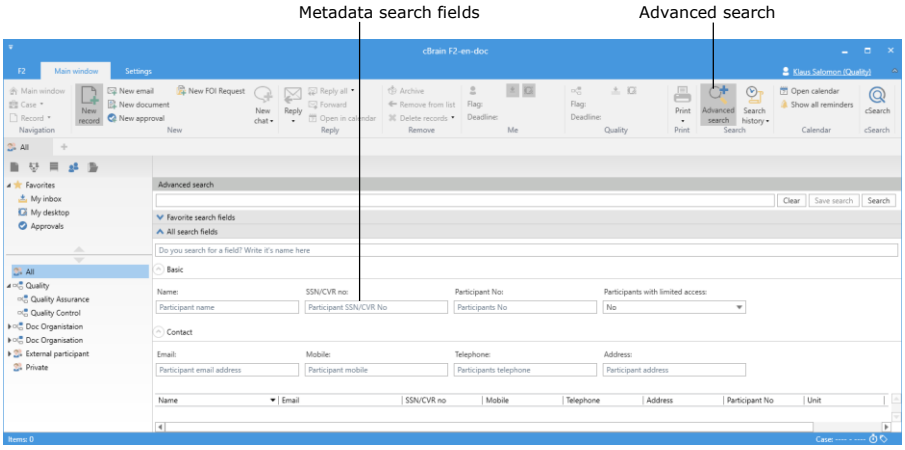

Figure 33: Use metadata to search for participants

An advanced participant search is similar to the advanced archive search. For further information, see the section *Advanced searches*.

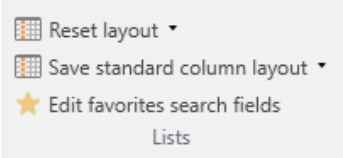

Figure 34: Menu item "Edit favourites search fields"

Favourite search fields

Users can create a search group with their personal favourite search fields.

This is done by clicking on **Edit favourites search fields** in "Settings" ribbon.

A dialogue with a wide range of predefined search fields will open. Click on **Participants** to the left of the dialogue and tick off the preferred search fields.

Click **OK** to finish.

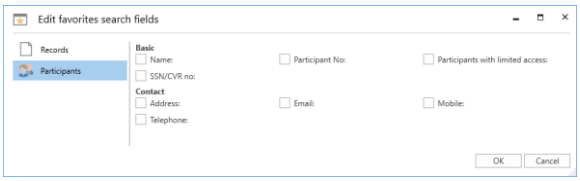

Figure 35: "Edit favourites search fields" - participants

The selected search fields will be added to the "Favourites search fields". This group is depicted in the example below.

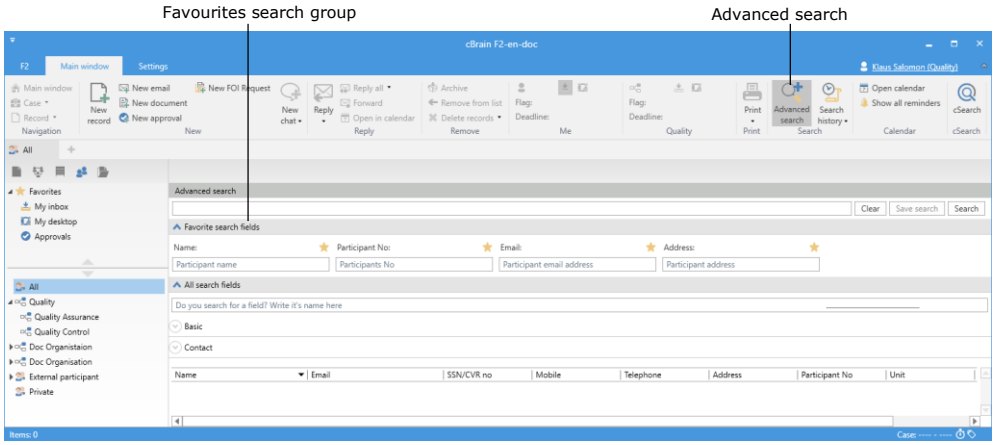

Figure 36: Search the participant register

The user can also add search fields to favourites when viewing a search group. To do this, hover the mouse over a search field to make a grey star appear. Click on the **star** to add that search field to favourites. The star turns yellow. Click the **star** again to remove the search field from "Favourites search fields".

Participant search fields

The table below describes each search field and its use.

The "Basic" search group:

Search field	Possible values	Comment
"Name"	User/unit	A search is performed for a participant with this name.
"SSN/CVR no"	Number	A search is performed for a participant associated with this SSN/CVR number.
"Participant No"	Number	A search is performed for a participant with the number that was automatically assigned by F2 when the participant was created in the register.
"Participants with limited access"	Yes/No	A search is performed for an external participant with limited acces (add-on module).

The "Contact" search group:

Search field	Possible values	Comment
"Email"	Email address	A search is performed for a participant associated with this email address.
"Mobile"	Number	A search is performed for a participant associated with this mobile telephone number.
"Telephone"	Number	A search is performed for a participant associated with this telephone number.
"Address"	Address, town/city and postal code	A search is performed for a participant with this address, town/city or postal code.

Filtering search results

As in the main window, it is possible to filter the search results in the participant register.

The following filters exist: “All”, “Active” and “Deactivated”.

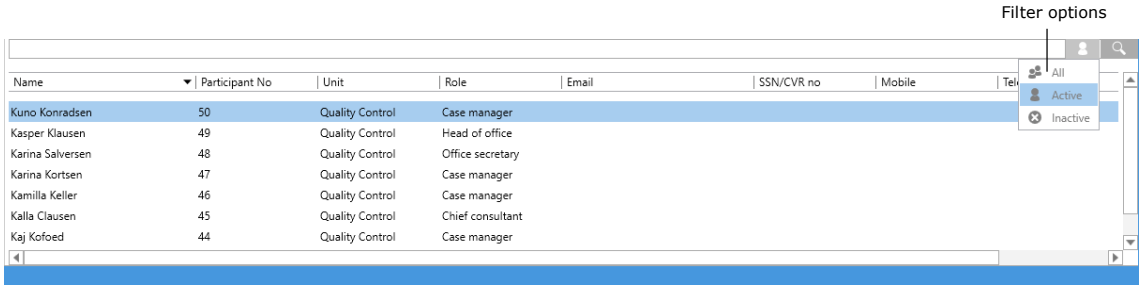

Figure 37: Filter options in the participant register

The table below describes each filter option.

Filter	Function
All	Shows all participants in the participant register.
Active	Shows all active participants in the participant register.
Inactive	Shows all inactivate participants in the participant register.

Note: Click on the desired **filter option** in the drop-down menu to activate the filter.

Related searches

Related searches are used to keep track of the parties involved in a number of records and/or cases. This provides the user with a comprehensive overview of the parties involved in selected records and/or cases simply by right-clicking.

This search also works in the opposite direction so that it is possible to see records and/or cases in which selected parties are involved.

Related searches are used for:

- Searching for participants based on records/cases
- Searching for records/cases based on participants

This search can be performed by **right-clicking** in either the main, record or case window as well as the record and case previews.

F2 comes with the following pre-defined related searches:

- All participants involved in one or more selected records*.
- All participants involved in one or more selected cases.
- All records in which the selected participants are involved.
- All cases in which the selected participants are involved.

*The term "Involved" includes everything from "Responsible", "Supplementary case manager" to email sender and recipient.

A related search always displays its results in a new search tab in the main window.

> **Note**: It is possible to create customer-specific searches for case of add-ons. These searches are created and maintained via the Server file explorer (add-on module) and require the role "Can edit related searches".

An example of a related search:

Hugo Hugosen wants to see which participants have been involved in a number of records in his inbox. Hugo highlights these records and **right-clicks** to open the context menu. Here he selects **Related** and then clicks on **All participants on these records**.

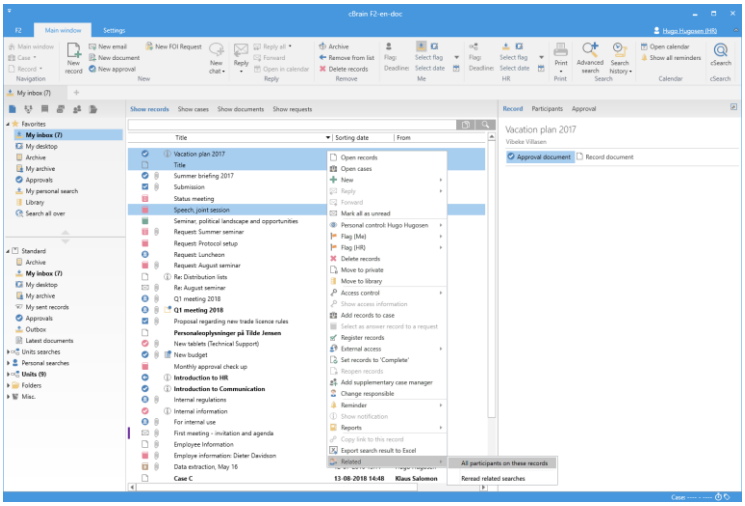

Figure 38: Find all participants involved in the marked records

F2 will now open a new search tab called "All" in Hugo's main window. The search tab shows all participants involved in the records that Hugo marked.

Now Hugo wants to narrow his search. He wants to know in which cases the participant "Hanne Winter" has been involved. For this reason, Hugo selects "Hanne Winter" from the search results in the "All" search tab and **right-clicks** to open the context menu. He selects **Related** in the menu and clicks on **All cases with these participants**.

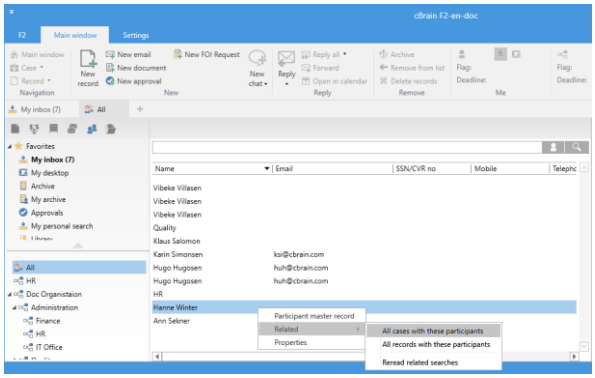

Figure 39: Find all cases with the selected participants

F2 opens a new search tab with the search results, which shows all cases in which the participant "Hanne Winter" has been involved. Using related searches, Hugo can continue searching from records or cases to participants and from participants to records or cases.

Search history

It is possible to view the most recent searches by clicking on the menu item **Search history** in the main window tab.

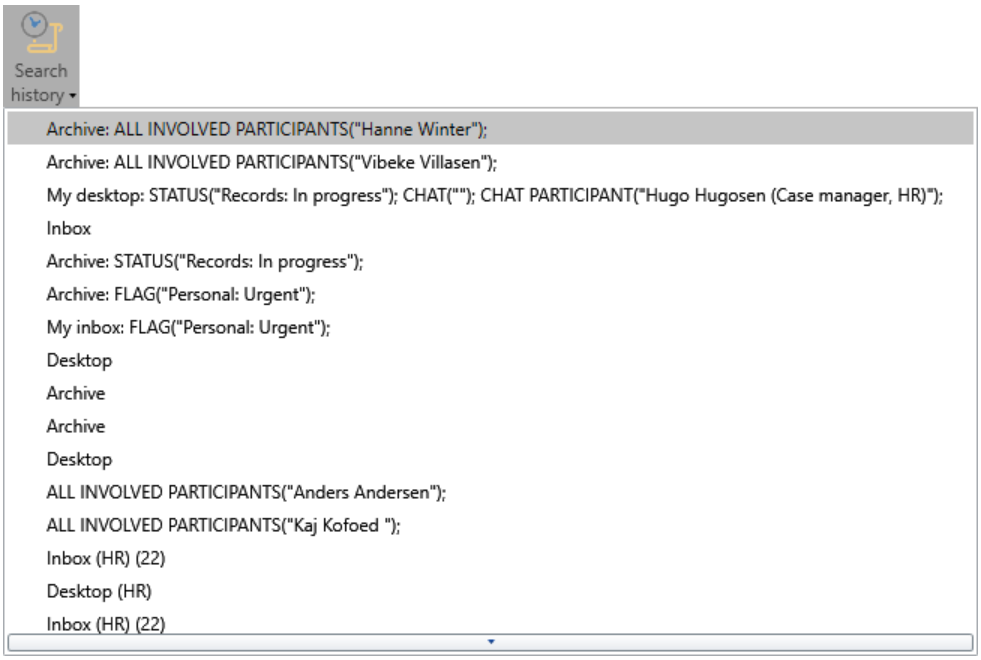

Figure 40: "Search history"

List of Figures