F2 Desktop

Settings and setup

Version 6.0

© Copyright 2018 cBrain

Table of Contents

Welcome to cBrain F2 4

Manual reading instructions 4

Add-on modules for F2 5

Other documentation 5

Settings and setup 6

Setup and user settings 6

General – in the "Setup" dialogue 6

The main window – in the "Setup" dialogue 10

Cases – in the "Setup" dialogue 11

Records – in the "Setup" dialogue 12

Record view – in the "Setup" dialogue 17

Documents – in the "Setup" dialogue 19

Chat – in the "Setup" dialogue 20

User – in the "Setup" dialogue 21

Task guides – in the "Setup" dialogue 24

Out of office – in the "Setup" dialogue 24

On behalf of me – in the "Setup" dialogue 26

User settings, menu item 28

Setup of the views in F2 30

Signatures, menu item 32

Create a new signature 32

Insert signature 33

Edit existing signatures 34

Language, menu item 36

Templates, menu item 37

Templates 37

Adding a new document template 41

Approval templates 41
Distribution lists, menu item 43
The "Distribution lists" dialogue 43
Create, edit and delete distribution lists 44
Setup of the result lists (column selection, grouping and sorting) 47
Columns – Select fields in the result list 48
List of Figures 50

Welcome to cBrain F2

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

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

Manual reading instructions

This document is part of the 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. All the sections can be read independently according to need.

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

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

The sub-manual that you are currently reading is marked in blue. To gain a better understanding of the sub-manuals 2-7 it is recommended to read the first sub-manual “The main window”.

The document uses a F2 version in which all add-on modules are enabled. Depending on how many add-on modules each organization have included in their F2 solution, users may notice that their F2 looks different than the one discussed in this manual.

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

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

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

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

Add-on modules for F2

In addition to the areas described in this document, F2 offers support for a number of processes and functions in the form of add-on modules. Please contact cBrain for further information.

Other documentation

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

Below is a list with a few examples:

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

Enjoy!

Settings and setup

In F2 it is possible to adjust the system to fit own preferences in regards to both functionality and layout. It is, for example, possible to regulate how to:

- Display the preview of records, cases, documents and emails in the main window.
- Display the access level that is given to users who are added as supplementary case managers etc.

In the following chapter the settings and setup possibilities will be gone through with the intention of providing the user with an understanding of the possibilities that F2 offers and how to adjust the settings.

In the main window it is the tab "Settings", that is used to adjust and set up F2. The individual user can decide between a number of options concerning F2's behaviour and can for example change the appearance of the main window.

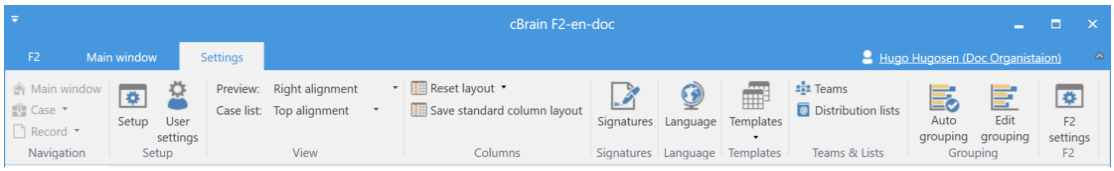


Figure 1: The tab "Settings"

The individual areas under "Settings" will be examined in the following pages.

Setup and user settings

Click on **Setup** on the "Settings" tab in the main window to open the "Setup" dialogue. This dialogue will be covered in the next section.

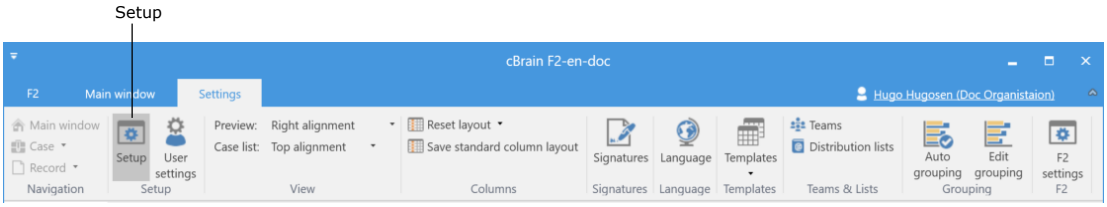


Figure 2: "Setup" under "Settings"

General – in the "Setup" dialogue

To change the general settings of F2 click on **General** in the dialogue "Setup" as shown below.

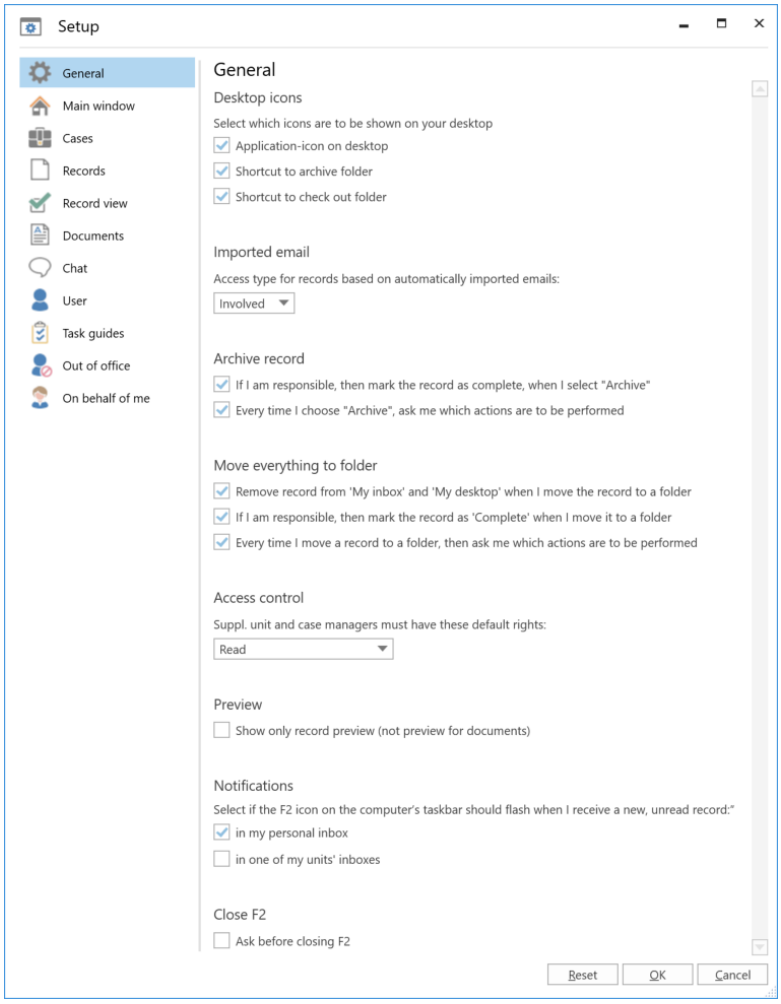
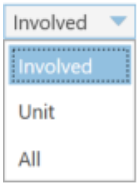
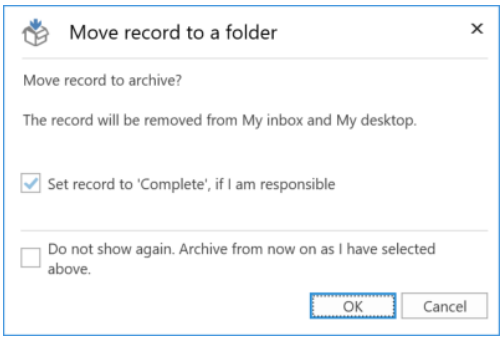
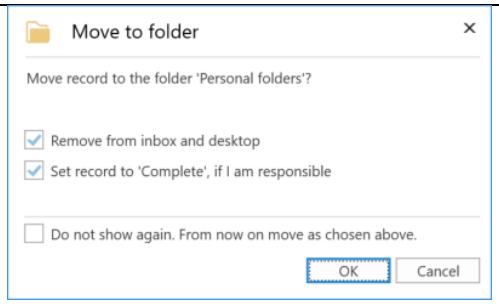
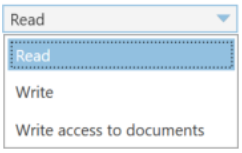


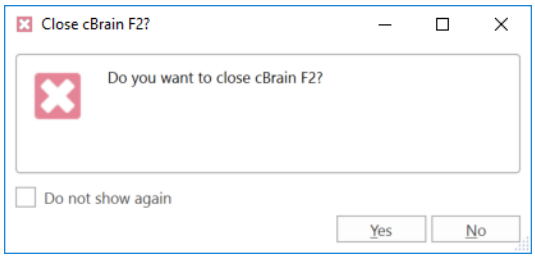
Figure 3: Setup – "General"

The individual setup possibilities are described below.

Function	**Purpose**
Under "Desktop icons" it is possible to select which icons and folders that are to be displayed on the computer's desktop:	
"Desktop icons"	The following icons can be added or removed to/from the computer's desktop: • The F2 program icon • A shortcut to the "Archive folder" (i.e. the folder for importing files to F2). • Shortcut to the "Check out folder" (i.e. the folder where the user can place documents that he/she wishes to work on offline. The documents can be checked into F2 again after).
Under "Imported email" select which access type imported emails should be given:	

Function	Purpose
"Access type for records based on automatically imported emails"  	Here it is possible to control which access level F2 should give imported emails. Choose between the following options: • "Involved" • "Unit" • "All". **Note**: It can be an advantage to set the access level to "Unit". This way if a user is not present e.g. because of sickness/vacation/maternity leave etc., the unit colleagues can still search for the emails that the unavailable user receives.
Under "Archive record" it is possible to select which actions that should be performed when a record is archived:	
"If I am responsible, then complete the record when I select "Archive""	If this box is ticked F2 will automatically set the record as complete when it is archived, if the user is responsible for the record.
"Every time I choose "Archive", ask me which actions are to be performed"	If this box is ticked the dialogue below will open when **Archive** is clicked on.  **Figure 4: The dialogue "Archive and close"**
Under "Move everything to folder" select which actions are to be performed when a record is moved to a folder.	
"Remove record from 'My Inbox' and 'My Desktop' when I move the record to a folder"	If this box is ticked, F2 will automatically remove the record from "My Inbox" and "My Desktop" when the record is moved to a folder.
"If I am responsible, then set record to 'Complete' when I move it to a folder"	If this box is ticked, F2 will automatically set the record to complete when the user moves the record to a folder, if the user is responsible for the record.
"Ask me every time I move a record to a	If this box is ticked the dialogue shown below will appear every time a user moves a record to a folder.

Function	Purpose
folder, which actions are to be performed”	 **Figure 5: The “Move to folder” dialogue**
Under “Access control” it is possible to set the access level that a unit or user should be given when they are added as a supplementary unit or case manager.	
“Suppl. unit and case managers must have these default rights”: 	There are three different access levels to choose between: 1) “Read”: The supplementary unit and/or case manager only receives read access to the record. 2) “Write”: The supplementary unit and/or case manager receives write access to the record’s metadata, the record itself and any attached documents. 3) “Write access to documents”: The supplementary unit and/or case manager receives write access to any attached documents on the record, but NOT to the record itself or the record’s metadata.
Under “Preview” select the settings for the preview.	
“Show only record preview (not preview for documents)”	If this box is ticked the user has to click on **Show preview** him/herself if a preview of the record’s attached documents is to be displayed. If the box is not ticked, F2 will automatically show a preview of the record’s attached documents.
Under “Notifications” select if the F2 icon, located in the computer’s taskbar, should flash when there are new records in an inbox.	
“In my personal inbox”	If this box is ticked, the F2 icon will flash when the user receives a new record in his/her personal inbox.
“In one of my unit’s inbox”	If this box is ticked, the F2 icon will flash when the user receives a new record in one of his/her unit inboxes.
Under “Close F2” setup the dialogue that appears when F2 closes.	

Function	Purpose
"Ask before closing F2"	If this box is ticked the dialogue "Close cBrain F2?" opens when F2 closes. If the box is not ticked F2 will close without asking if the user is sure about closing F2.  **Figure 6: The "Close cBrain F2?" dialogue**

The main window – in the "Setup" dialogue

It is possible to personalise the standard settings for the main window. Click on **Main window** in the dialogue "Setup" as shown below.

It is also possible to adjust the display of one's general searches.

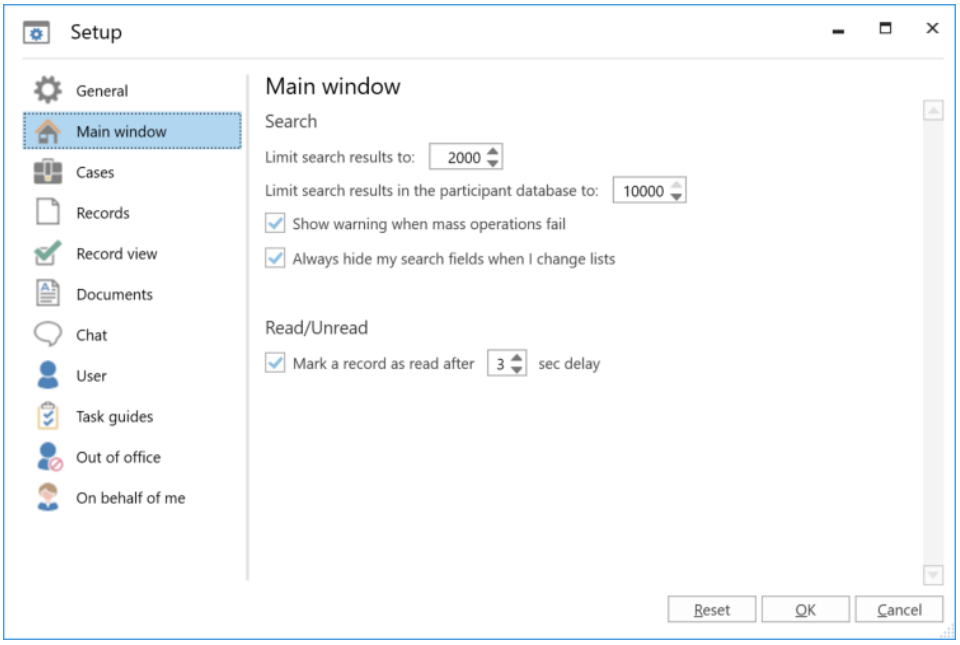


Figure 7: Setup for the "Main window"

The individual setup possibilities for the main window are described below:

Function	Purpose
"Limit search results to:"	Specify the number of search results that F2 should display in the different lists when a search is performed. It is recommended to set the number between 200-300. If more results are

	found, than specified in this field, F2 will inform about this. After performing a search, F2 shows the number of results found on the blue status line in the bottom left corner. If a user has set the limit at 300 results, F2 will not show more than 300 results. This means that the actual number of results could be higher than the displayed.
"Limit search results in the participant database to:"	Specify the number of search results that F2 should display when a search is performed in F2's participant register. It is an advantage to set this number at 1000. After performing a search, F2 shows the number of results found on the blue status line in the bottom left corner. If a user has set the limit at 1000 participants, F2 will not show more than 1000 participants. This means that the actual number of participants could be higher than the displayed.
"Show warning when mass operations fails"	If this box is ticked a warning will always appear if a mass operation fails.
"Always hide my search fields when I change list"	F2 remembers if the search fields on a given list where displayed or hidden. Tick this box and F2 will instead hide the search fields as a standard when changing between lists.
"Mark a record as read after X sec delay"	Select if a record is to be marked as read, when the record is shown in preview. It is also possible to select how long the record is to be shown in preview before the record is marked as read.

Cases – in the "Setup" dialogue

Click on **Cases** in the "Setup" dialogue to define which security groups should be added to a newly created case. It is also possible to define which fields should be displayed by default when a case is opened.

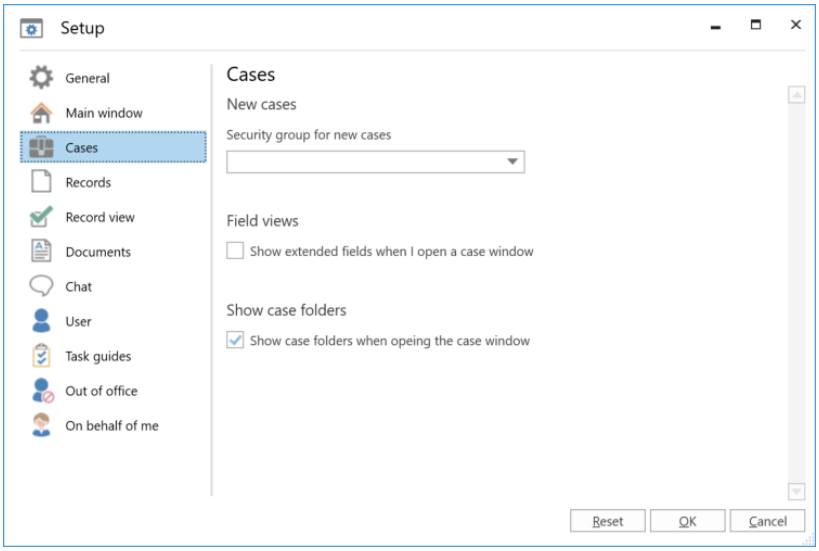


Figure 8: Setup for "Cases"

The individual setup possibilities for the case window is described below:

Function	Purpose
"Security group for new cases"	Specify if new cases should be attached to a specific security group. If this field is filled in, new cases will not be given a security group, by default, when created. Security groups function as access groups with the purpose of protecting data in F2. An F2 administrator assigns the users to the wanted security groups. Read more about security groups in *F2 Desktop – Administrator manual*.
"Show extended fields when I open a case window?"	Select whether a case should be opened with a simple or extended layout. I.e. if the case's metadata fields have been chosen as a default to be either displayed or hidden.
"Case folders are shown when I open a case window?"	Select if the case folders should be displayed when case window is opened. It this box is not ticked, the case folders will be hidden when opening a case window.

Records – in the "Setup" dialogue

It is possible to personalise the record window's default settings. Click on **Records** in the "Setup" dialogue, as shown below.

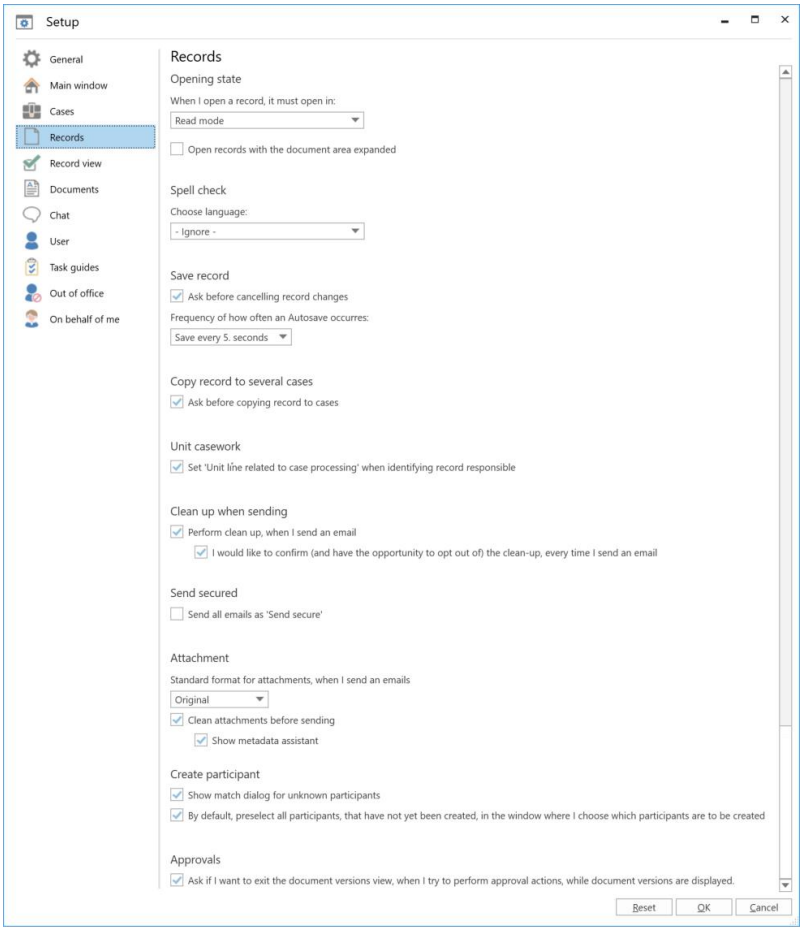
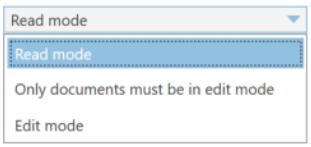
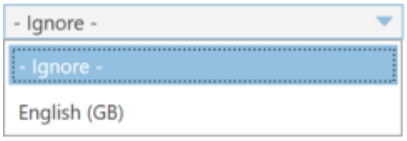
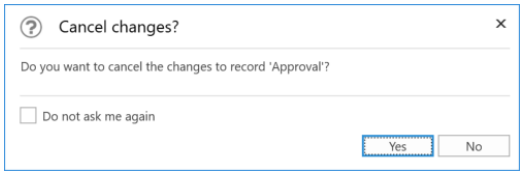
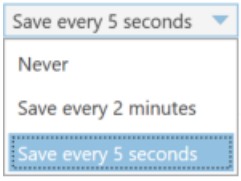
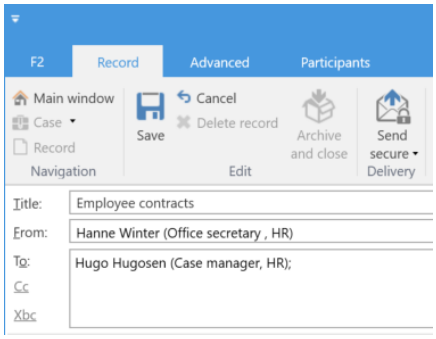


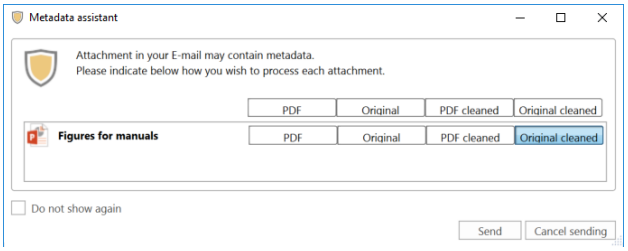
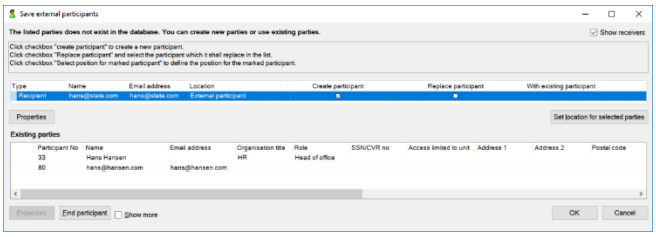
Figure 9: Setup for "Records"

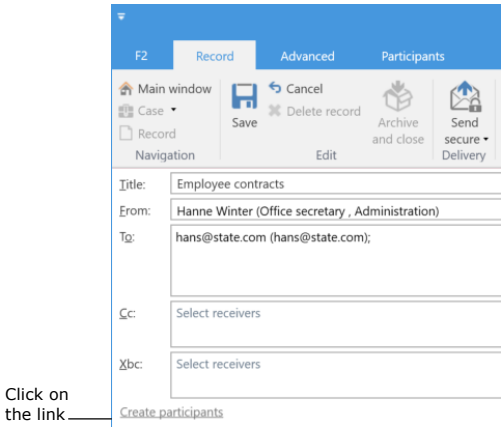
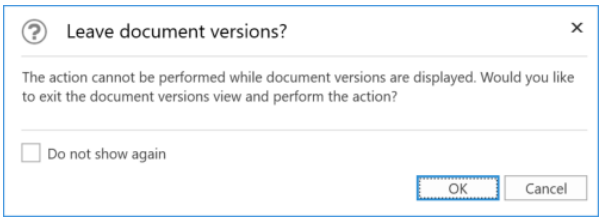
The individual setup options for the record window are described below:

Function	**Purpose**
"When I open a record, it must open in:"  	Choose which state the record should be opened in: • "Read mode" opens the record in read mode, which means the user has to click on **Edit** in order to write in the record. • "Only documents must be in edit mode" opens the record in read mode, but it is possible to edit the attached documents. • "Edit mode" opens the record in editing mode, so it is possible to edit metadata, attached documents and the record itself.
"Open records with document area expanded"	Opens the record with the document area expanded. If this box is not ticked the document area will be folded.

Function	Purpose
"Choose language"	Select if the spell-check function should be activated along with the desired language.  **Figure 10: Select language**
"Ask before cancel record changes"	Select if F2 should ask if changes to a record should be cancelled when the "Cancel" button is used in the record window.  **Figure 11: The "Cancel changes?" dialogue**
"Auto save interval"	Choose between the following auto save intervals:  **Figure 12: Select the auto save interval**
"Ask before copying record to cases"	Select if F2 should ask the user if the record should copy the chosen record to more than one case.
"Set 'Unit line related to case processing' when identifying record responsible"	If this box is ticked, the record field "Unit line related to case processing" will be ticked by default when the record is allocated responsibility.
Under "Clean up when sending" there are a number of setting possibilities for automatic clean up:	
"Perform clean-up, when I send an email"	F2 helps the user clean up if this box is ticked. I.e. F2 will automatically complete and move the record to the "Archive" when the record is sent.

Function	Purpose
"I would like to confirm (and have the opportunity to opt out of) the clean-up, every time I send an email"	I.e. F2 asks the user to confirm the clean up before F2 automatically cleans up.
"Send all emails as 'Send secure'"	F2 will by default, send all emails using the function "Send secure" (add-on module). It is possible for the user to change this function on each individual record.  **Figure 13: "Send secure" as a default setting** **Note**: The send button in the record window changes to fit the users default settings. I.e. if the user has ticked the "Send secure" box, the send button will change to "Send secure" as shown above.
It is possible to choose the standard format that attached documents should have when a record is sent to an external receiver. Furthermore it is possible to select whether the documents should be cleaned for internal metadata (add-on module).	
"Standard format for attachments, when I send an email:"	Choose if documents, attached to a record, should have the format "PDF" or "Original" as a standard.
"Clean attachments before send"	Select if all documents attached to a record should be attached without metadata.

Function	Purpose
"Show metadata assistant"	F2 shows the sender which format the document will have when it is attached to the record. Before sending an email to an external participant F2 will open a dialogue asking the sender to consider if the default settings are to deviated and if so, which format the documents should then be sent in and if they should be cleaned for metadata.  **Figure 14: The "Metadata assistant" dialogue**
Create participant	
"Show match dialogue for unknown participants"	If an external email is sent or received and F2 does not recognise the participant a dialogue will open where it is possible to save the unknown participant.  **Figure 15: The "Save external participants" dialogue**

Function	Purpose
"By default, all participants that have not been created yet must be preselected in the window where I choose which participants are to be created"	Click on **Create participant** in the record window to add an unknown participant to the register of participants.  **Figure 16: "Create participants"**
"Ask if I want to exit the document versions view, when I try to perform approval actions, while document versions are displayed"	If an attempt to process an approval is done while the document versions are shown in the log, the dialogue shown below will open.  **Figure 17: The "Leave document versions?" dialogue** For additional information see *F2 Approvals – User manual*.

Record view – in the "Setup" dialogue

It is possible to personalise the standard settings for how the record window should be displayed when it is opened. Click on **Record view** in the "Setup" dialogue to access the settings as shown below.

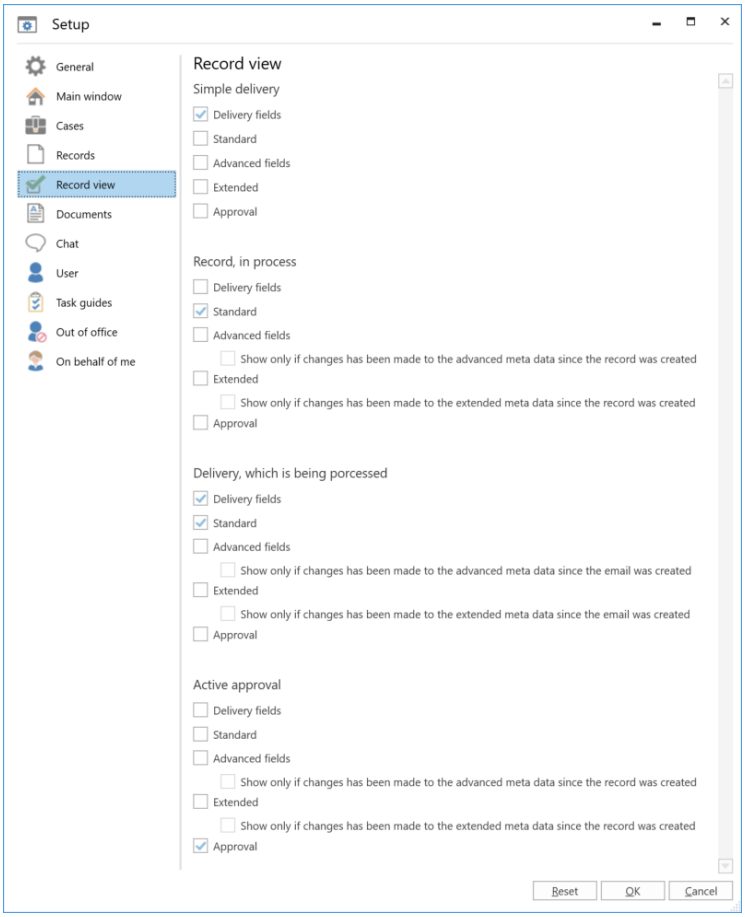


Figure 18: Setup for "Record view"

The different viewing options for the record window are described below. It is, among other things, possible to choose if a record should be opened with a simple or extended layout. I.e. if the record's metadata fields are displayed or not by default.

Function	**Purpose**
"Simple delivery"	Select how the record's metadata should be displayed when opening delivery records.
"Record, in process"	Select how the record's metadata should be displayed when opening records that are being processed.
"Delivery, which is being processed"	Select how the record's metadata should be displayed when opening delivery records that are being processed.
"Active approval"	Select how the record's metadata should be displayed when opening an active approval.

Documents – in the "Setup" dialogue

Click on **Documents** in the "Setup" dialogue to define how F2 should react when an attached document is opened on a record that is not in editing mode. It is also possible to define how F2 should react when a document is opened directly from the main window.

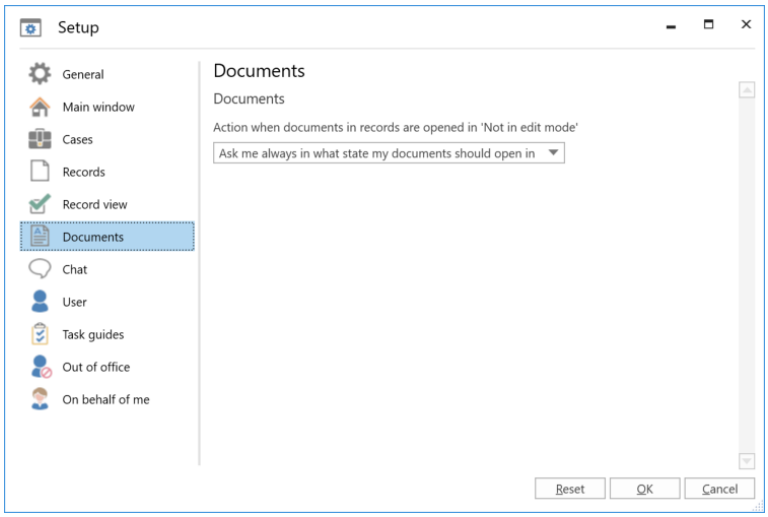


Figure 19: Setup for "Documents"

The individual setting options for attached documents in connection with the function "Action when documents in records are opened in 'Not in edit mode'" is described below. It is possible to choose which condition attached documents should be opened in by default, when opening the documents in F2. This is valid for both the record and main window.

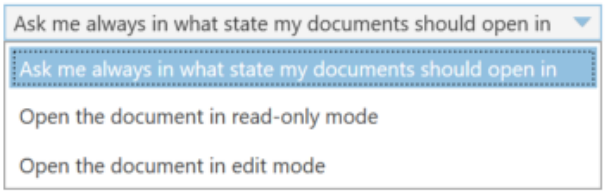
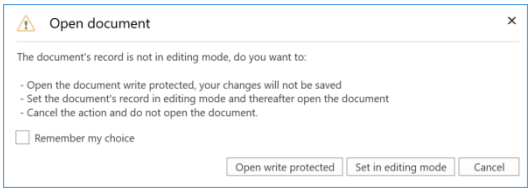


Figure 20: Select the opening mode for documents

Function	Purpose
"Ask me always in what state my documents should open in"	The dialog below opens whenever a document is opened from a record that is not in editing mode. Choose between the two options below in the given situation.  **Figure 21: The "Open document" dialogue**

Function	Purpose
"Open the document in read-only mode"	The document opens in read-only mode, and changes to the document cannot be saved. The setting is primarily used when a document is to be read but not further processed.
"Open the document in edit mode"	The document opens in edit mode if the user has the right to edit the document, and the user can then start the work immediately. When the document on the record is opened, the document is automatically set in editing mode.

Chat – in the "Setup" dialogue

After clicking on **Chat** in the "Setup" dialog, set the chat display settings.

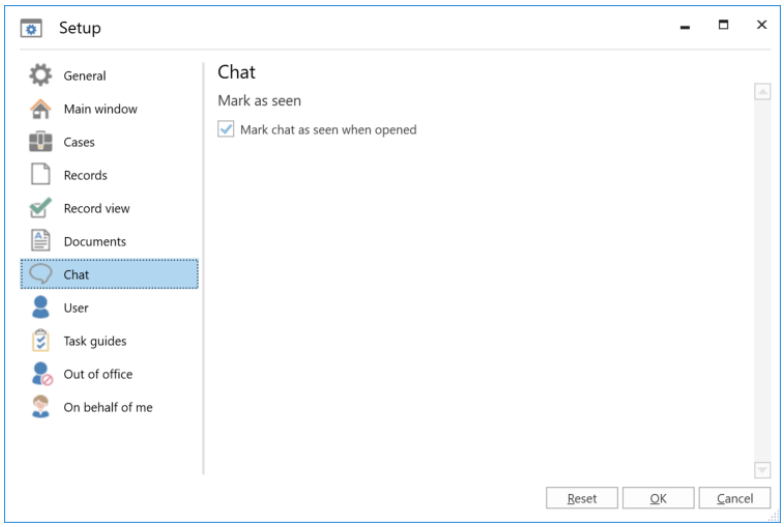


Figure 22: Setup for "Chat"

Below are the individual setting options for the "Chat" dialog.

Function	Purpose
"Mark as seen"	Tick this box, to select whether to automatically mark a chat as seen when the chat is opened.

User – in the "Setup" dialogue

After clicking on **User** in the "Setup" dialog, it is possible to select a default role. If a user has multiple job roles, the user can choose to display the dialog "Role chooser" at login.

It is also here that a user with a visual impairment can switch on F2's accessibility so that F2 can be operated using a screen reader.

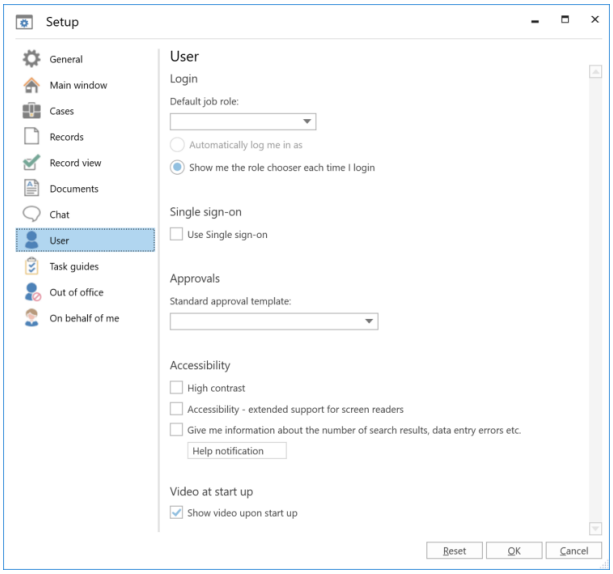
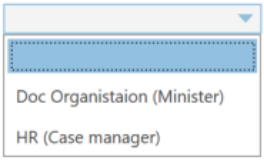
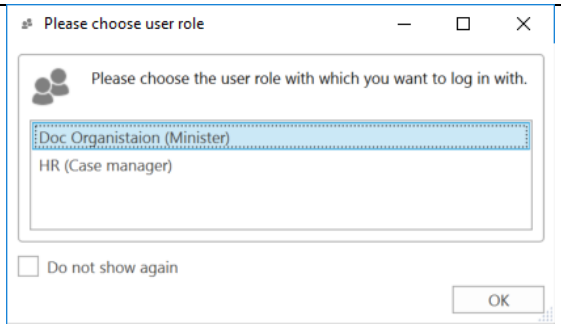
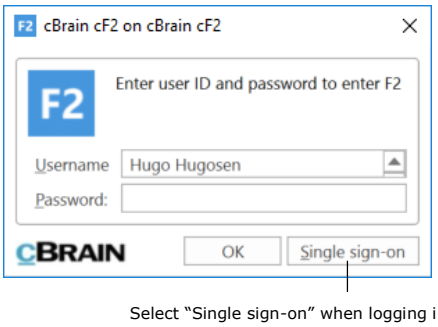
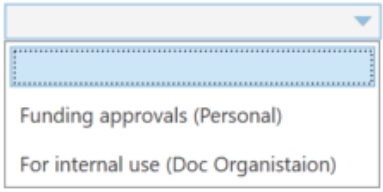
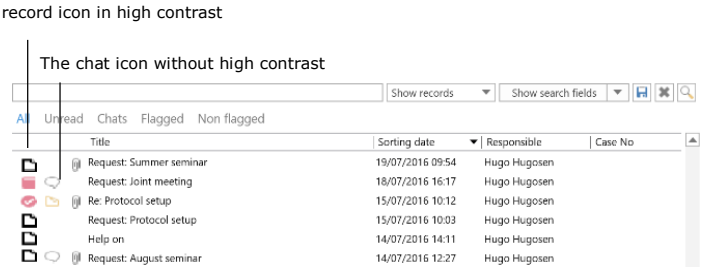
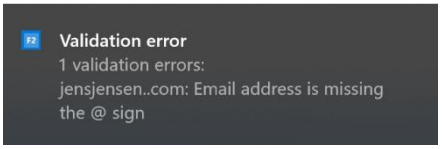


Figure 23: Setup for "User"

Below are the individual setting options.

Function	**Purpose**
If a user has multiple roles in F2, the "Login" settings provide a number of options for how F2 will handle these roles.	
"Default job role" 	Select the user's default role when logging in. Choose among the job roles that the user has already been assigned by an administrator. This role is also used for email import.
"Show me the role chooser each time I login"	If "Show me the role chooser each time I login" is selected, the dialogue "Choose role" appears upon login.

Function	Purpose
	 **Figure 24: The "Please choose user role" dialogue** In the dialog, the user selects the role to be logged in as shown in the example above. If one of the above roles is not selected, the user is automatically logged in with the selected default job role.
"Use single sign-on"	Select whether to turn off single sign-on, in which case a password must be entered to start F2. **Note**: Even though there is no tick in the "Use single sign-on" box, it is still possible to select single sign-on when logging in. Single sign-on uses Windows login to log in to F2.  **Figure 25: Login using "Single sign-on"**
"Standard approval process template"	Select which approval process template that is to be used as a standard when creating a new approval process.  **Figure 26: Select standard approval template**

Function	Purpose
Under "Accessibility", there are a number of options for setting up and adapting the accessibility of F2:	
"High contrast"	Ticking this field makes it possible to replace the normal F2 icons with F2 icons in a higher contrast. That is, there is a greater difference between light and dark in the same icon as shown in the example below.  **Figure 27: Example of an icon with high contrast** **Note**: It is technically possible to display certain icons with a higher contrast. Such additions must be clarified and organised with cBrain. F2 must be restarted before the changes enter into force.
"Accessibility – Extended support for screen readers"	Tick the box to allow a screen reader to be used in F2. F2 must be restarted before the changes enter into force.
"Give me information about the number of search results, data entry errors etc."	Choose how F2 should notify the user when performing searches, warning icons, validation errors including entering invalid values such as incorrect email addresses and the like. The user can choose to be notified using a help box at the bottom of the main, record and case window or a pop-up window.  **Figure 28: Help notification**
Under "Video at start up", F2's startup video can be turned on/off.	
"Show video on start-up"	Here, the F2 startup video can be turned on/off.

Task guides – in the "Setup" dialogue

If the F2 add-on module *Task guides,* has been purchased, the menu item "Task guides" is displayed. Click on **Task guides** in the "Setup" dialog, and the different setup options are displayed.

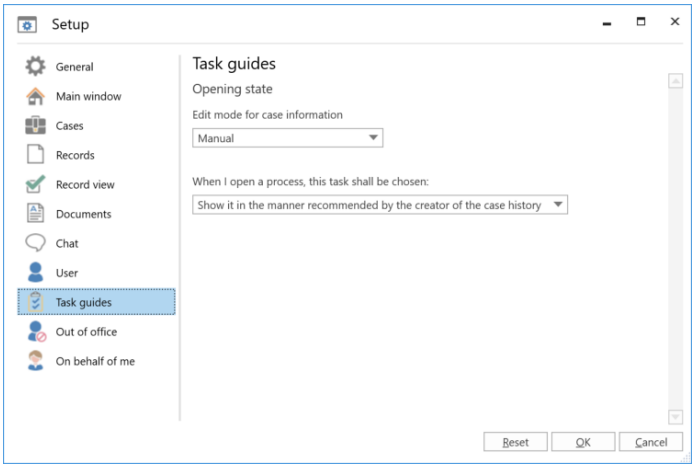
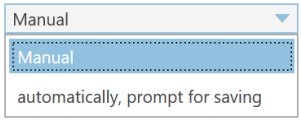


Figure 29: Setup for "Task guides"

Below, the individual user setting options for tase guides are described.

Function	Purpose
"Edit mode for case information"  	Select the editing mode for the cases information when the user opens a task guide. Select between the following options: • "Manual" • "Automatically, prompt for saving".
"When I open a process, this task shall be chosen"  	Select how the navigation should be for a chosen process in the task guide. It is possible to select where the user is located in a process when the user opens a task guide. Choose between: • "Show it in the manner recommended by the creator of the case history". • "Do not choose a task". • "Choose the first task". • "Choose the first uncompleted task".

Out of office – in the "Setup" dialogue

Click on **Out of office** in the "Setup" dialogue to create an automatic out of office message. The automatic message applies for internal communication in F2. External senders can also receive an auto-reply, but this needs to be set up in the specific organisation's email account.

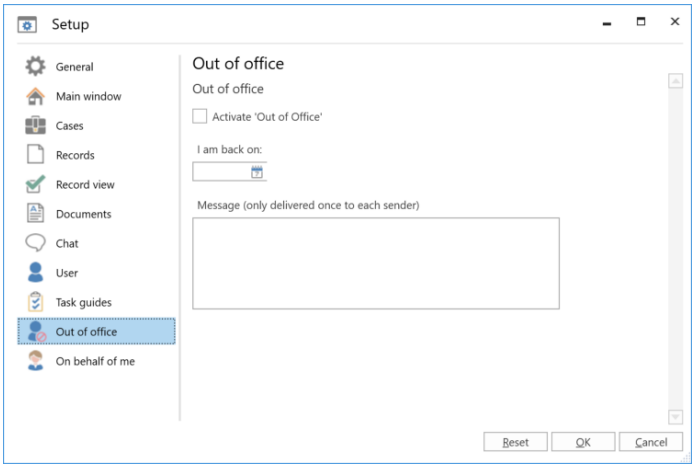


Figure 30: Setup for "Out of office"

The different setup options are described below.

Function	**Purpose**
Set the "I am out of office" auto-reply under "Out of office":	
"Activate "Out of Office"	Tick this box to indicate that the user is not present. This can for example be due to vacation, sick leave, maternity leave or similar. When the box is ticked, the "Out of office" feature activates, which sends an auto-response when the user receives mail in F2. **Note**: The tick has to be manually removed once the user is present again. As displayed in the figure below, a user's icon will change to "out of office". Place the mouse over the user on the participant list in chats/notes and information will appear informing that the user is out of office and when he/she will be back again.  **Figure 31: Out of office in chat**
"I am back on:"	Specify the date that the user will be back again.
"Message (only delivered once to each sender)"	Enter the auto-reply that will be sent to other users when they try to contact the user who is out of office while he/she absent.

Function	Purpose
	Note: The automatic message is only sent once to each sender. If the user recievers multiple emails from the same sender, the sender will still only receive the out of office auto-reply once.

Note: It is possible to save one's "Out of office" user settings, while logged in on behalf of another user. Other user settings are not saved when logging out or changing to a user that you have "on behalf of" privileges.

On behalf of me – in the "Setup" dialogue

Click on **On behalf of me** to give on behalf of privileges to another user, so he/she can act on behalf of the user who is unavailable.

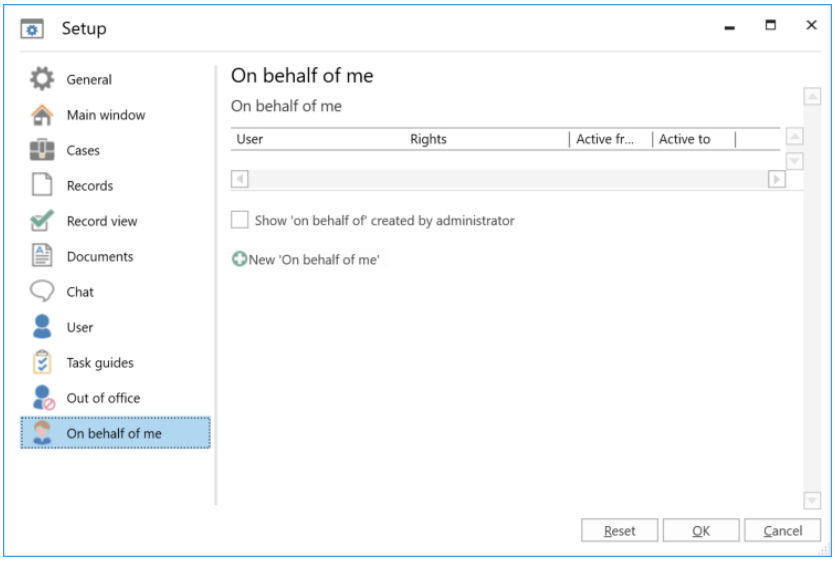
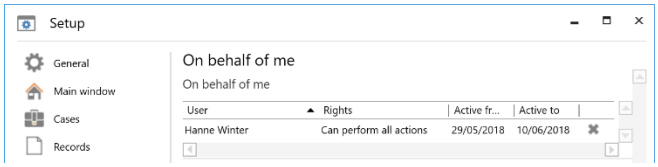
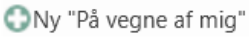
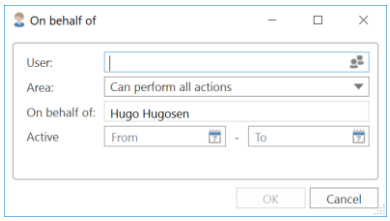


Figure 32: Setup for "On behalf of me"

The individual setting options for on behalf of privileges granted to another user (colleague) are described below. This function allows the user in question to act on behalf of the user him/herself.

Function	Purpose
"On behalf of me"	If on behalf of privileges have been granted another user, it is then possible to see the following in the overview: • Who the privilege has been given to. • The area the privilege covers. • The duration of the privilege.

Function	Purpose
	A privilege can be withdrawn/deleted by pressing on the ✖ next to the user that has a on behalf of privilege.  **Figure 33: The "On behalf of" overview**
"Show 'on behalf of' created by administrator"	Tick the field "Show 'on behalf of' created by administrator to view the on behalf of privileges that have been granted by an F2 administrator.
"New "On behalf of me""  	This opens the following dialogue:  **Figure 34: Give on behalf of permissions** Specify the following: • In the "User" field enter which colleague should be given on behalf of privileges for the user in question. • In the "Area" field enter which privileges the user should be given. It is possible to choose between "Can perform all actions" and "Can handle approvals". • In the "On behalf of" field enter who the colleague is acting on behalf of. • In the "Active" field specify the timeframe for the on behalf of privilege. This makes it possible to grant on behalf of privileges for a limited period. If no dates are entered the on behalf of privilege will be active for an unlimited period. • Click on **OK** to complete the act of granting an on behalf of privilege.

User settings, menu item

A user can retrieve a default user setting or a partial user or column setting. I.e. selected or deselected settings that apply to a specific user setting or a specific column setting that controls which columns are shown in the result list, the order of the columns, the columns width, how the columns are sorted and the grouping of columns if applicable.

It is an administrator that is responsible for the creation of the general user settings that are adapted to meet the different user role's needs. Depending on the user role there will often be different settings needed. For more information, see *F2 Desktop – Administrator manual*.

Click on **User settings** in the "Setup" tab in F2's main window to open the dialogue "User settings".

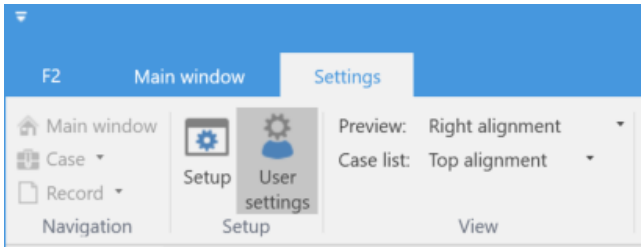


Figure 35: The menu item "User settings"

In the dialogue it is possible to view the different user settings that have been created by an administrator. Click on the user setting you wish to use and the menu item "Use this user setting" will become active as shown below.

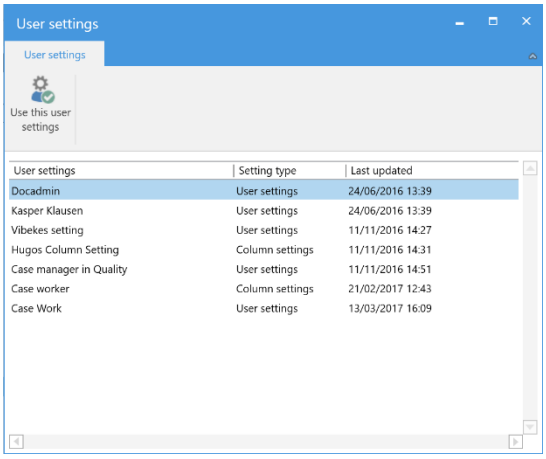


Figure 36: The "User settings" dialogue

Click on **Use this user setting** to override the user's existing user settings with the chosen one. A green bar will appear in the top of the dialogue with the message "You now use the user settings from "XX"" as shown below.

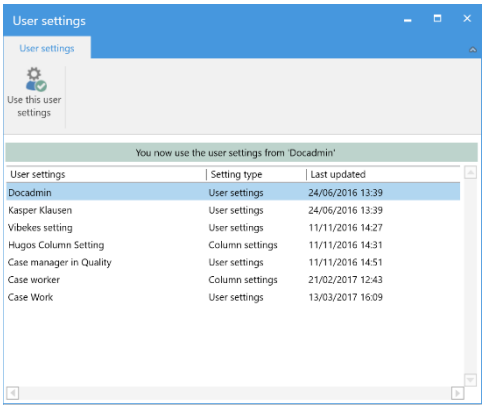


Figure 37: Use this user setting

Note: If new user settings are retrieved these will first become active after restarting F2. The new user settings will overwrite any eventual changes that the user has made him/herself in the user settings.

Setup of the views in F2

On the "Settings" tab it is possible to control the list and folder views in F2. The view can be adjusted for every individual list, search and folder. For more information see the section *Setup of the result lists (column selection, grouping and sorting)*.

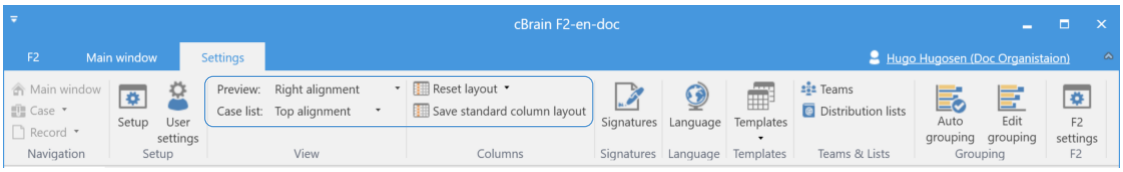
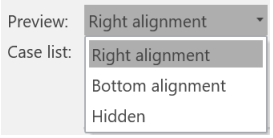
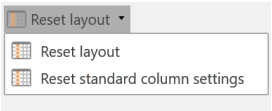
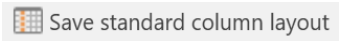


Figure 38: View settings under the "Settings" tab

The menu items "Preview", "Case list", "Reset layout" and "Save standard column layout" are described below.

Function	Purpose
"Preview:"  	A preview of a record document or the first few pages of an attachment is displayed in a separate window, when the user clicks on a record. The preview is an effective tool to gain an overview of the contents of a specific record. The preview can be displayed: • "Right alignment" • "Bottom alignment" • "Hidden". If "Hidden" is chosen, no preview will be displayed. **Note**: If a file is heavy only a limited number of pages will be shown in the preview. When this occurs F2 will clearly inform the user about it.
"Case list:"  	Select where in the window the records associated with the given case are to be located when a list is in the "Show cases" view. It is possible to choose between "Left alignment" where the case is displayed to the left of the case's records or "Top alignment" where the records are displayed beneath the case.
"Reset layout:"  	"Reset layout" overwrites the user's current column layout settings. If the user has saved standard column settings these will be chosen, otherwise the global default layout settings will be used.

Function	Purpose
	"Reset standard column settings" removes the user's saved default column settings and replaces them with the global default column settings.
"Save standard column layout:" 	This operation overwrites any existing default column settings that have been saved (in relations to the chosen list, search or folder) and replaces them with the new chosen column settings.

There are three different layout levels for column settings in F2. These are Basic, Standard and Personal column settings.

Function	Purpose
Basic column settings	These settings are delivered with F2 and are non-changeable.
Standard column settings	These settings are setup by an F2 administrator. These are setup when an F2 administrator creates a new non-personal search with a given layout, that F2 then saves as the standard layout.
Personal column settings	These settings are setup by the user him/herself. If a user changes the layout a personal layout is created for the chosen search.

If a saved search is chosen F2 searches for the personal layout that is related to the selected search. If this cannot be found, F2 instead searches for the standard layout for the chosen search. If this cannot be found either the basis column setting layout is used.

Signatures, menu item

Click on the menu item **Signatures** in the "Settings" tab to create a new signature or to edit an existing.

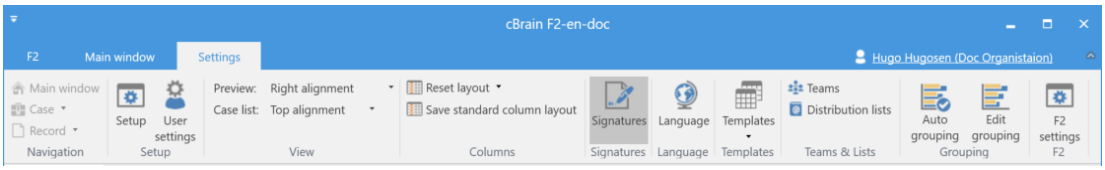


Figure 39: The menu item "Signatures" under the "Settings" tab

There are no limits as to how many signatures a user can have in F2. However, if a user wants F2 to automatically add a signature when a new record is opened, only a single signature can be selected.

Create a new signature

Click on **Signatures** to open a dialogue that provides an overview of the user's signatures.

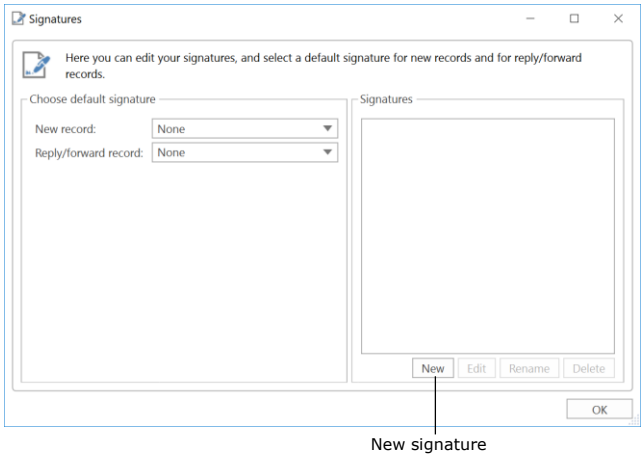


Figure 40: Create signature

If a new signature is to be created click on **New**. A dialogue, like the one shown below, then opens where the name of the new signature is entered.

Figure 41: Name the signature

After entering the name of the new signature click on **OK**. A window then opens where the user can edit the signature, like shown below. When the signature is finished click on **OK**.

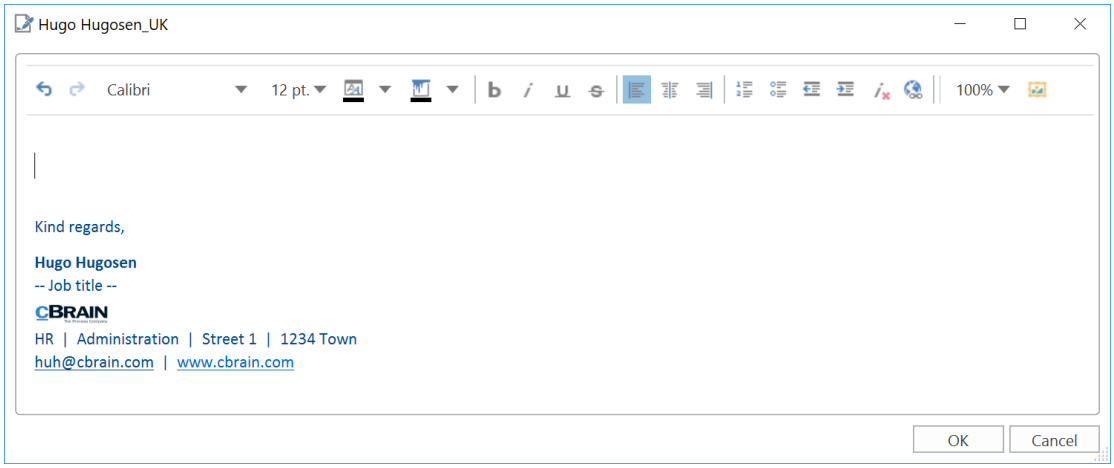


Figure 42: Editing the individual signature

In connection with the setup of F2 a system administrator can create a standard signature template that can be used as a reference point, as shown above. However, normally all users are free to create their own signatures.

Insert signature

A signature can be placed directly in the record document. To do this click on **Insert** on the record, and the signature text will be placed in the record document where the cursor is located.

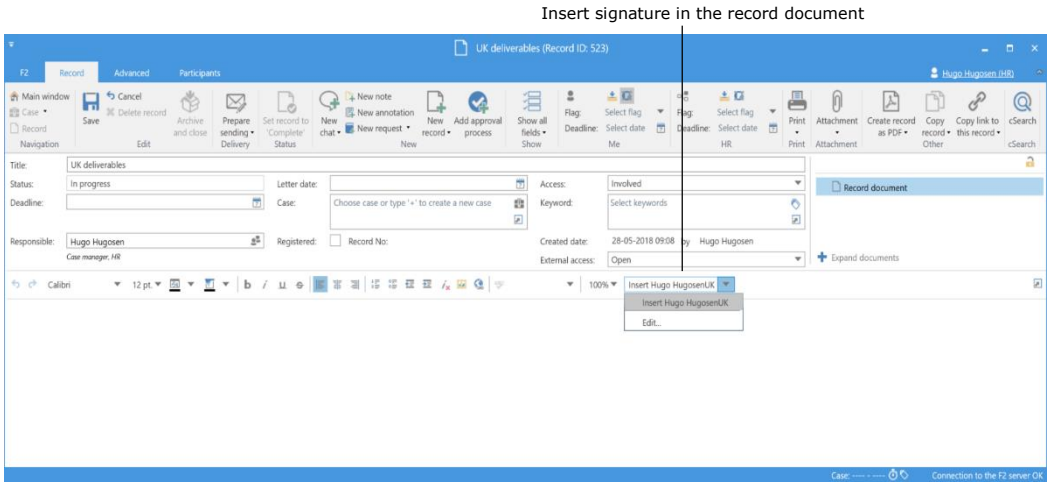


Figure 43: Insert signature

It is possible to setup F2 so that a standard signature is inserted when a new record is created. The same applies when an email is replied to or forwarded. Under the menu item “Signatures” select if F2 should insert the standard signature for the fields “New record” and “Reply/Forward record” by using the dropdown menu. Both fields are set to “None” by default.

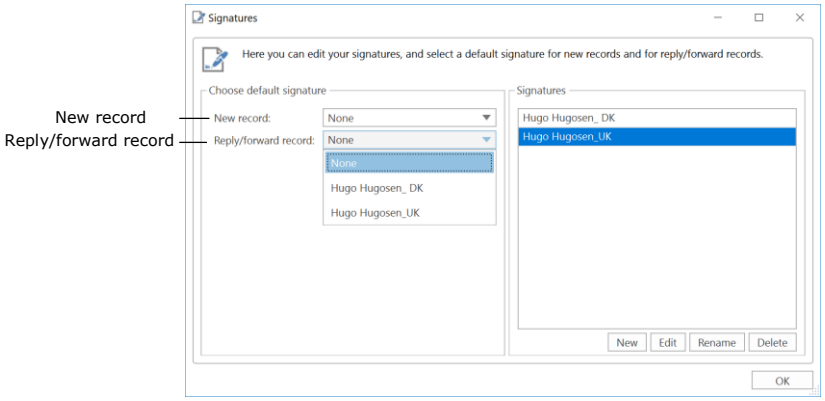


Figure 44: Add signature

Edit existing signatures

An already existing signature can be edited, renamed or deleted.

- To edit an already existing signature, mark the wanted signature and click on **Edit**.
- To rename an already existing signature, mark the wanted signature and click on **Rename**.
- To delete an already existing signature, mark the wanted signature and click on **Delete**.

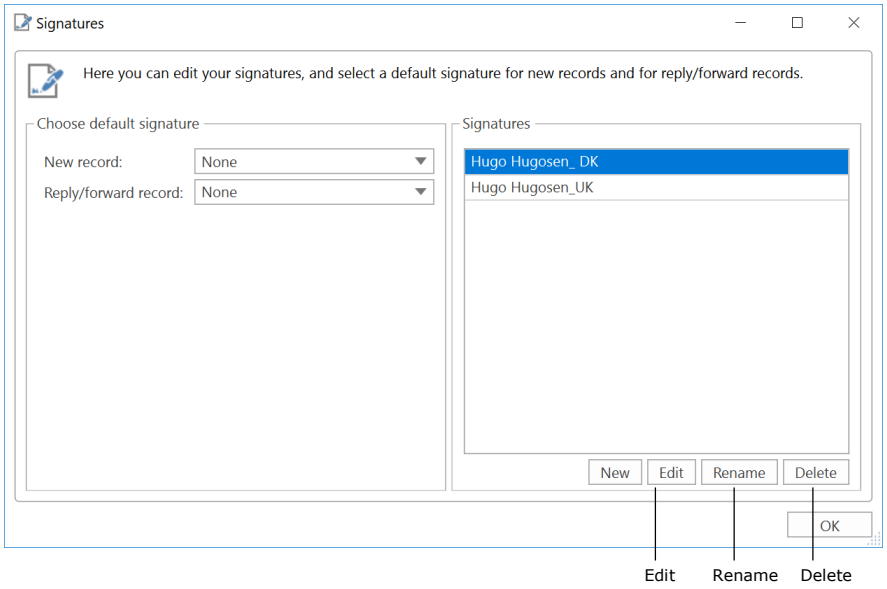


Figure 45: Edit, rename or delete signature

It is possible to add, edit and delete signatures two places in F2. Either as shown above using the menu item “Signatures” on the “Settings” tab or by performing the action directly from a record.

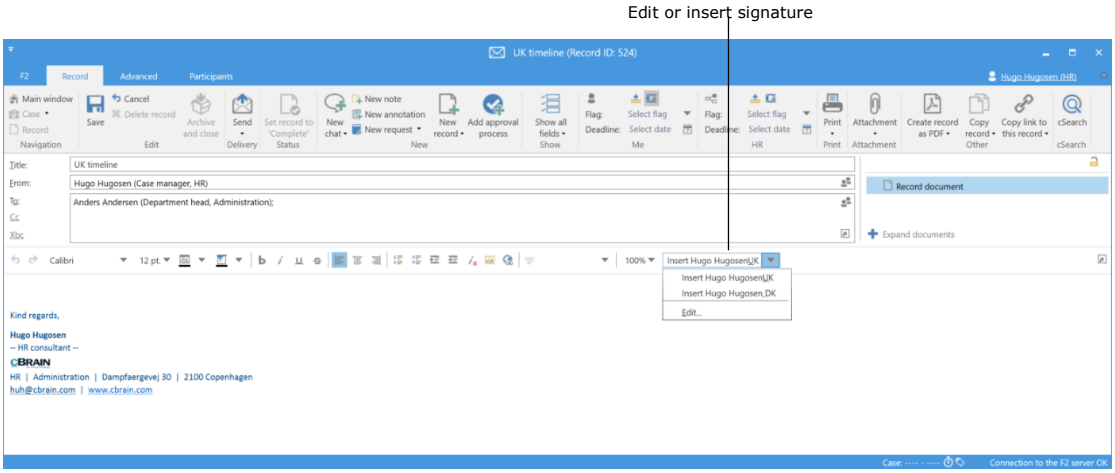


Figure 46: Add, edit or delete a signature in an email

Language, menu item

The menu item "Language" is found under the "Settings" tab and will be described in the section below. Other languages than the customer's main language are add-on modules.

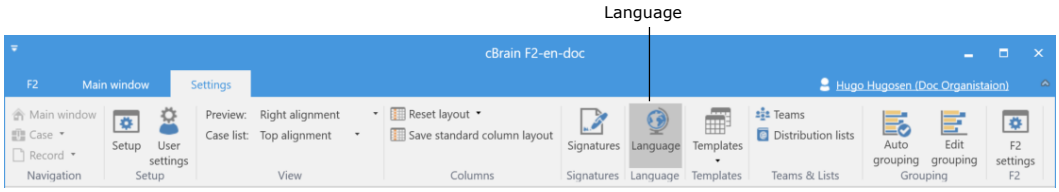


Figure 47: The menu item "Language" under the "Settings" tab

Depending on which languages a specific F2 installation has been installed with, it is possible to choose between one or more languages when logging in. Currently it is possible to choose between the following languages: Danish, English and German.

To change the language, click on the menu item **Language** which makes the following dialogue appear.

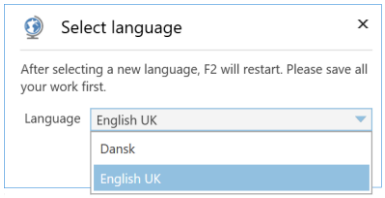


Figure 48: Select language

Note: F2 restarts when a new language is selected.

Templates, menu item

In F2 it is possible to save templates for Office programs. These templates can be used when new documents are created in F2. The menu item "Templates" can be found on the "Settings" tab in the main window.

Using the menu item "Templates" it is possible to administrate document and approval templates for an authority.

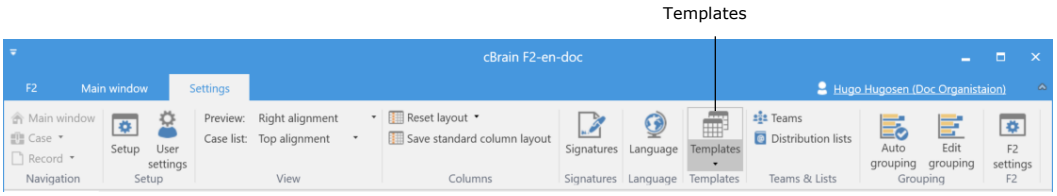


Figure 49: The menu item "Templates" under the "Settings" tab

All users can create private document templates to use for daily work. If the document templates are to be accessible as standard documents for the entire authority or for an individual unit under the authority, this has to done by a user who has either a business administrator role or who is a F2 administrator.

Depending on the individual F2 installation there is either one or two types of templates that appear when clicking on **Templates**:

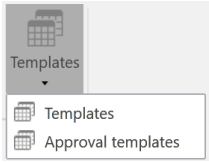


Figure 50: Select templates

In the example above it is possible to choose between templates for either documents or approvals.

Templates

Click on **Templates** and the dialogue shown below will appear. Here the authority's and the user's personal templates can be viewed.

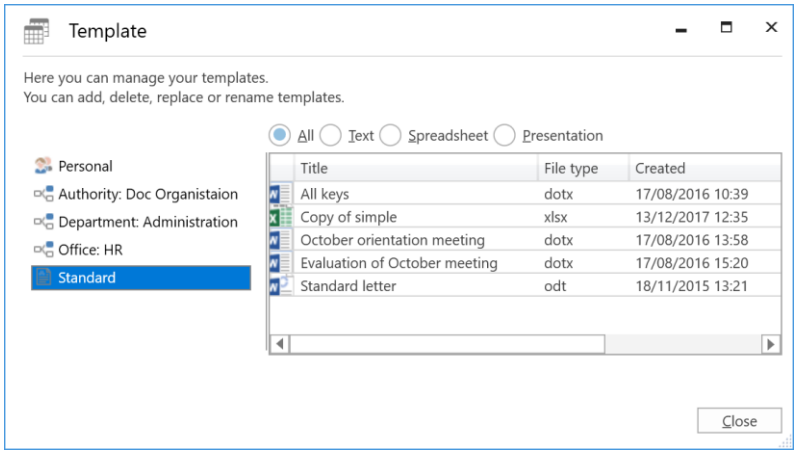


Figure 51: Maintenance of the templates

The different types of document templates can be sorted using the following criteria: "All", "Text", "Spreadsheet" or "Presentation".

In the current F2 installation it is possible to create templates for:

Type	Description
Personal	The individual user's private document templates.
Authority	Document templates that are accessible for all users in the specific authority.
Department	The department's document templates can be used by all users in the department along with all underlying units.
Office	The office's document templates can be used by all users in the office in question.

In the dialogue with the overview over document templates it is possible to create, delete, move and/or rename the different document templates. Right click on a unit or folder and the following options appear:

- **Add template** to upload new Office templates.
- **Rename folder** to change the name of an already existing folder.
- **Delete folder** to delete a folder.
- **Create folder** to organise the document templates.

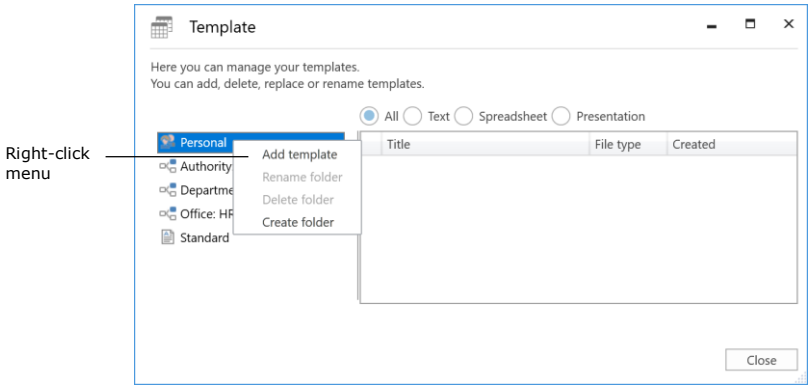


Figure 52: The right-click menu that appears when clicking on a unit or folder

Right-click on a document template and the following options will appear:

- **Properties** to correct an existing document template's properties for example the template's title.
- **Save copy** to download a copy of an existing document template.
- **Replace content** to upload a replacement file for an existing document template.
- **Delete** to remove a document template.

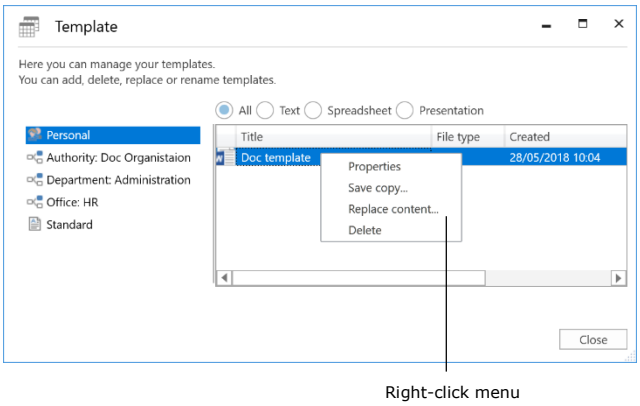
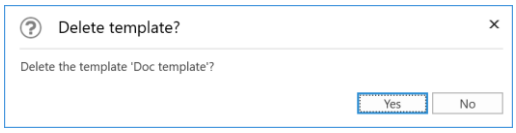


Figure 53: The right-click menu when clicking on a template

The individual menu items in the right-click menu will be described below.

Function	Description
"Properties"	Click on **Properties** in the right click menu to open the dialogue "Document properties". In the "Document properties" dialogue it is possible to change the title of the document template. Furthermore, it is possible to read a number of template information, for example who created the document that the template is based on, who saved the templates, when it was saved, etc.

Function	Description
	Under "Size (KB)" it is possible to view the document template's file size. It is also possible to view the template path that the template belongs to.
"Save copy"	Select "Save copy" to save a copy of the document template file that is saved locally on the computer.
"Replace content"	Select "Replace content" to replace the current document template file with a selected file from an external drive.
"Delete template"	Select "Delete template" to delete the document template. Click on **Yes** in the dialogue to confirm the action.  **Figure 54: Delete template**

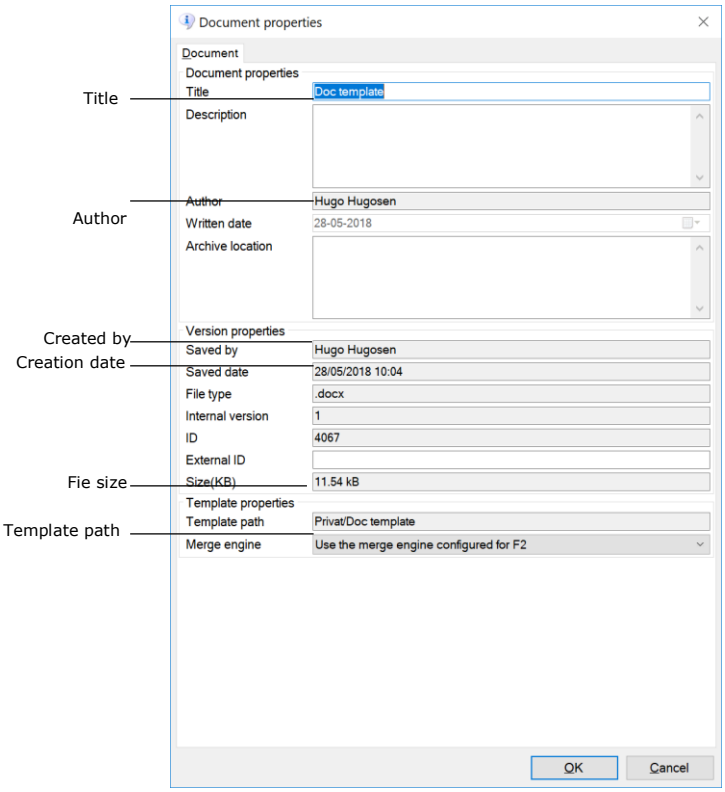


Figure 55: Document properties

Adding a new document template

Document templates that are to be used in F2, have to be generated outside if F2 and then imported. This is done by right clicking on the folder or unit where the document template is to be placed and then clicking on **Add template**.

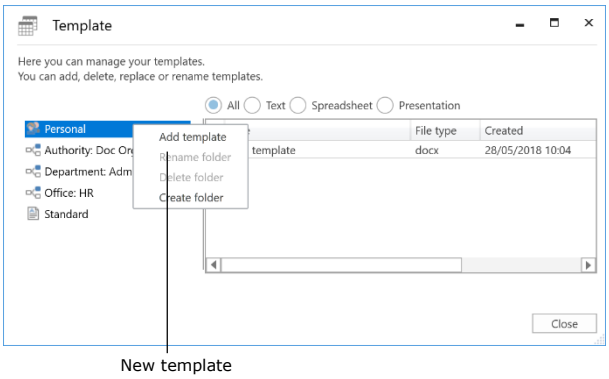


Figure 56: Create new template

Click on Browse in the "New template" dialogue to import the wanted document template from an external drive.

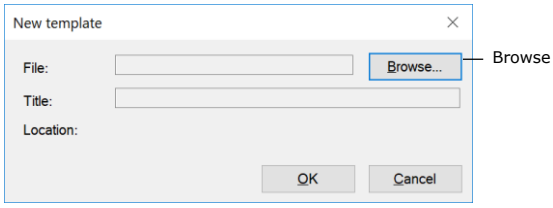


Figure 57: Add new template

Give the document template a title. If the user has permission to establish department or authority templates, it is possible to select where the chosen document template should be located.

Approval templates

If a certain setup for an approval process is to be applied more than once, it is beneficial to save it as an approval template.

There are two types of approval templates:

- **Personal approval templates**: These are created by the individual users and can only be seen/used by the user him/herself.
- **Shared approval templates**: These are available for the entire authority and/or chosen departments. Shared approval templates are setup by an F2 administrator or a user with a business administrator role. This user also determines who can see and use the selected approval templates.

Click on **Templates** and then on **Approval templates** to view a list containing the active approval templates.

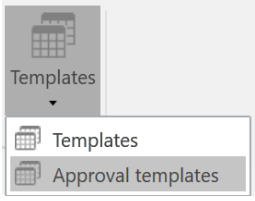


Figure 58: Select approval template

Approval templates are created directly in F2, in contrast to the creation of document templates. For more information in regards to creating approval templates please see *F2 Approvals – User manual*.

Distribution lists, menu item

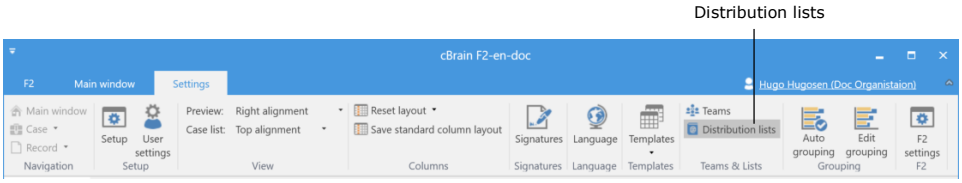


Figure 59: The menu item "Distribution lists" under the "Settings" tab

The menu item “Distribution lists” opens the dialogue shown below.

The “Distribution lists” dialogue

All users can create personal distribution lists. However, only users who have a role that has been given the privilege distribution lists editor can create and manage the joint distribution lists in F2.

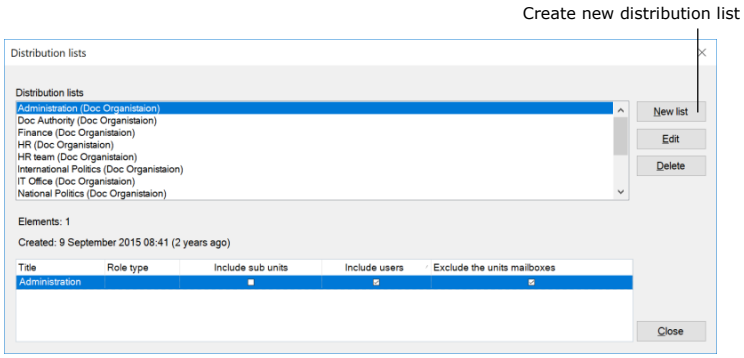


Figure 60: The "Distribution lists" dialogue

If a user, who does not have the privilege as distribution lists editor, wants to create a new list the “Edit distribution lists” dialogue will appear and the “Name” field will be displayed with a locked “Private” box, that cannot be unticked.

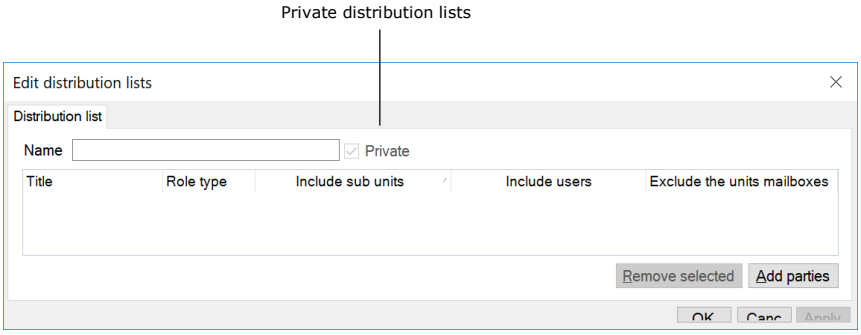


Figure 61: Create a private distribution list

Create, edit and delete distribution lists

To create a new distribution list, click on **New list** and provide the list with a name.

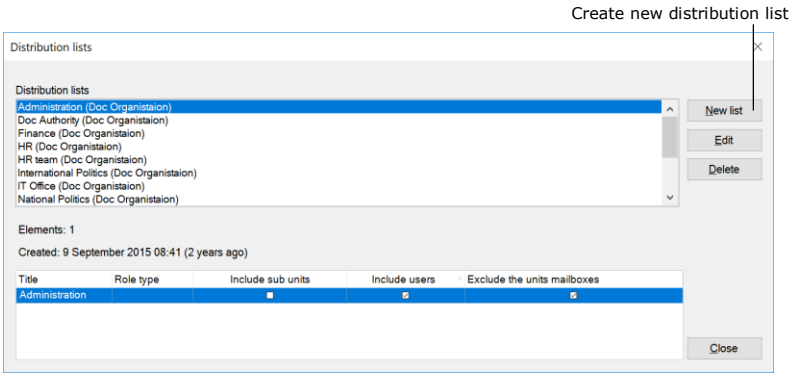


Figure 62: Create a new list

In the "Edit distribution lists" dialogue click on **Add parties** to select which unit and/or user (participant) that should be added to the distribution list.

It is possible to add other units and users (also from other F2 authorities) along with external participants to a distribution lists. This allows for a distribution list that contains a mix of participants from the user's own authority along with participants from other authorities, units and external participants.

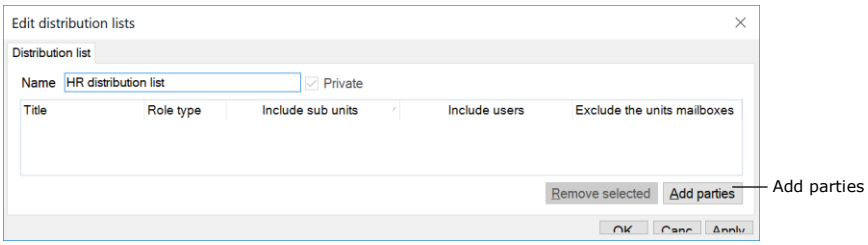


Figure 63: Add participants

In the "Choose participants" dialogue it is possible to select the users for the distribution list. When a participant has been found, double click on it or click on **Add participant(s)** to add the participant in question to the distribution list. Click on **OK** when done with adding participants to the list.

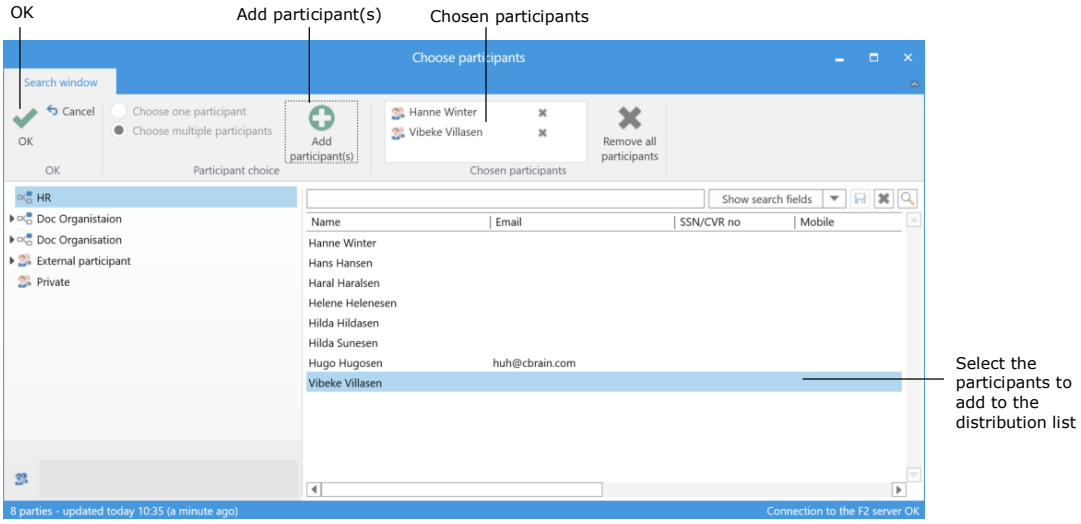


Figure 64: Select participants for a distribution list

When **OK** is clicked in the dialogue shown above, the user is sent back to the "Edit distribution lists" dialogue. Here it is possible to select if units and users in the hierarchy under the users chosen units and/or users should be included by ticking the boxes as shown in the dialogue below.

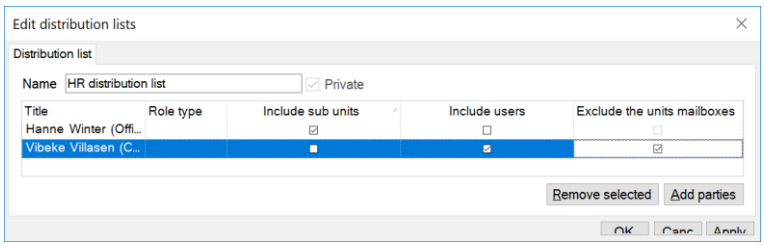


Figure 65: Edit distribution list

When the user is finished creating the distribution list click on **OK**.

Distribution lists that the user has created him/herself can be edited and/or deleted. This is done by selecting the wanted list in the dialogue "Distribution lists". To open this dialogue, click on the menu item **Distribution lists** on the "Settings" tab in the main window. After the dialogue opens click on either **Edit** to edit or **Delete** to delete the list.

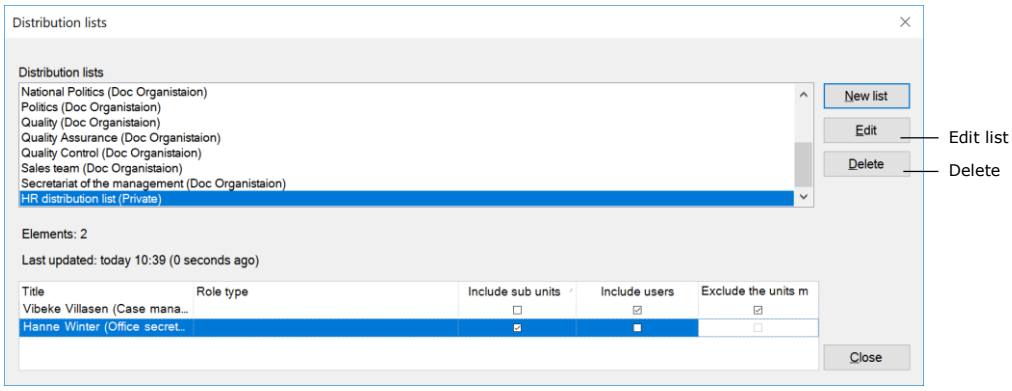


Figure 66: Edit or delete distribution list

Setup of the result lists (column selection, grouping and sorting)

A user can change the appearance of the result list so that the user has his/her own personal layout. As goes for all column views in F2, it is possible to adjust the columns width and location in the result list.

To change the order of a column simply drag and drop the column in the wanted order. The width of a column can be adjusted by pulling on the column in question until it has the desired width. A review of columns and their use can be found in the section *Columns – Select fields in the result list.*

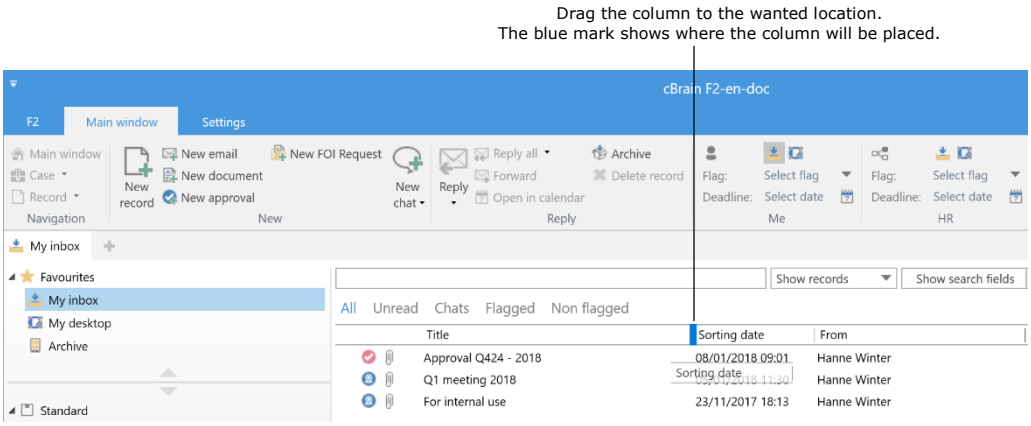


Figure 67: Columns can be moved around in the result list

To sort a result list, click on a columns title and the list will be sorted according to the columns values. For example, if the result list is sorted by title it will appear in alphabetical order (either a-z or z-a) or if the result list is sorted by letter date it can be sorted in numerical order (either 0-9 or 9-0).

> **Tip**: The result list can be sorted further by holding down the Shift button and then clicking on a second column. For example, first sort the result list with "Responsible" then hold down the Shift bottom and select for expample "Title" as the second column. The individual titles will then be sorted under each "Resonsible" as shown below.

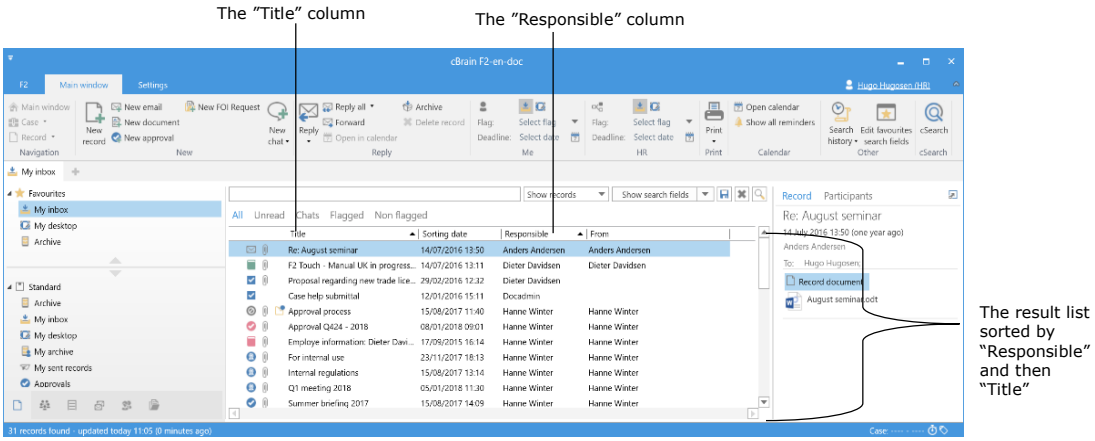


Figure 68: Sorting the columns displayed in the result list

Columns – Select fields in the result list

A user can select which fields should be displayed as columns in the result list. Right click on one of the columns in the result list and then click on **Columns** in the right click menu that appears. The column selector will then open.

The number of columns may vary between installations. Therefore, some of the columns described here only appear if the installation contains one or more add-on modules.

Which columns can be selected depends on the view – if it is records, cases, documents or requests that have been selected.

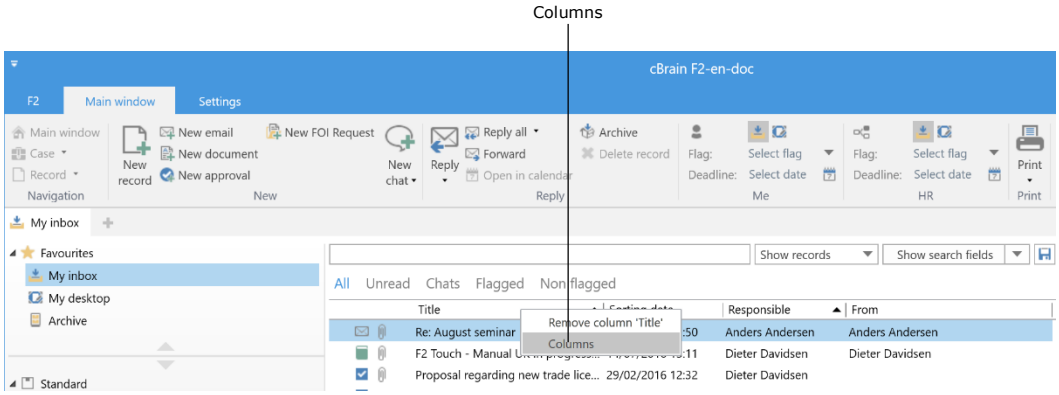


Figure 69: Open the column selector

The dialogue below illustrates the column selector. The dialogue provides an overview of all the columns that it is possible to select. It is possible to search for a column title by using the search field.

By default, all column titles are shown in the dialogue. Tick the box "Show only selected columns" and only the columns that have been selected are displayed in the dialogue.

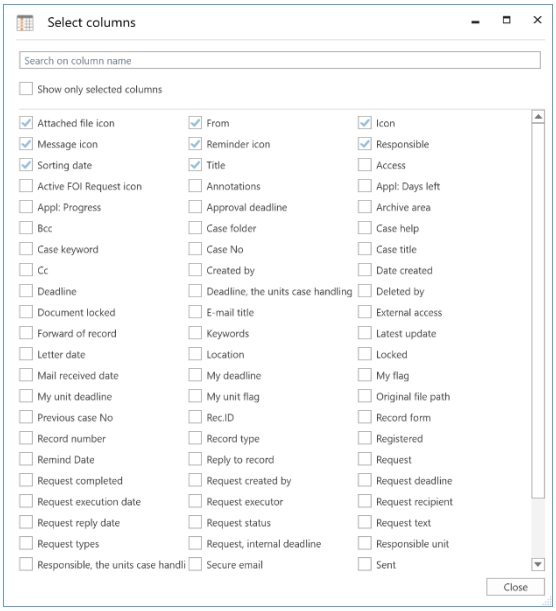


Figure 70: The column selector

Select or deselect a column by ticking or removing a tick from the box outside the column title. The columns that are displayed in the result list are located in the top of the column selector.

> **Note**: If all columns are removed by mistake, right click on the empty column bar to access the column selector again.

All permanent lists including personal lists, have their own layout. If a layout is changed, it is only changed for the list that the user has chosen.

List of Figures

Figure 1: The tab “Settings” 6

Figure 2: “Setup” under “Settings” 6

Figure 3: Setup – “General” 7

Figure 4: The dialogue “Archive and close” 8

Figure 5: The “Move to folder” dialogue 9

Figure 6: The “Close cBrain F2?” dialogue 10

Figure 7: Setup for the “Main window” 10

Figure 8: Setup for “Cases” 12

Figure 9: Setup for “Records” 13

Figure 10: Select language 14

Figure 11: The “Cancel changes?” dialogue 14

Figure 12: Select the auto save interval 14

Figure 13: "Send secure" as a default setting 15

Figure 14: The “Metadata assistant” dialogue 16

Figure 15: The “Save external participants” dialogue 16

Figure 16: “Create participants” 17

Figure 17: The “Leave document versions?” dialogue 17

Figure 18: Setup for “Record view” 18

Figure 19: Setup for “Documents” 19

Figure 20: Select the opening mode for documents 19

Figure 21: The “Open document” dialogue 19

Figure 22: Setup for “Chat” 20

Figure 23: Setup for “User” 21

Figure 24: The “Please choose user role” dialogue 22

Figure 25: Login using “Single sign-on” 22

Figure 26: Select standard approval template 22

Figure 27: Example of an icon with high contrast 23
Figure 28: Help notification 23
Figure 29: Setup for "Task guides" 24
Figure 30: Setup for "Out of office" 25
Figure 31: Out of office in chat 25
Figure 32: Setup for "On behalf of me" 26
Figure 33: The "On behalf of" overview 27
Figure 34: Give on behalf of permissions 27
Figure 35: The menu item "User settings" 28
Figure 36: The "User settings" dialogue 28
Figure 37: Use this user setting 29
Figure 38: View settings under the "Settings" tab 30
Figure 39: The menu item "Signatures" under the "Settings" tab 32
Figure 40: Create signature 32
Figure 41: Name the signature 32
Figure 42: Editing the individual signature 33
Figure 43: Insert signature 33
Figure 44: Add signature 34
Figure 45: Edit, rename or delete signature 34
Figure 46: Add, edit or delete a signature in an email 35
Figure 47: The menu item "Language" under the "Settings" tab 36
Figure 48: Select language 36
Figure 49: The menu item "Templates" under the "Settings" tab 37
Figure 50: Select templates 37
Figure 51: Maintenance of the templates 38
Figure 52: The right-click menu that appears when clicking on a unit or folder 39
Figure 53: The right-click menu when clicking on a template 39
Figure 54: Delete template 40

Figure 55: Document properties 40

Figure 56: Create new template 41

Figure 57: Add new template 41

Figure 58: Select approval template..... 42

Figure 59: The menu item "Distribution lists" under the "Settings" tab 43

Figure 60: The "Distribution lists" dialogue..... 43

Figure 61: Create a private distribution list 43

Figure 62: Create a new list 44

Figure 63: Add participants 44

Figure 64: Select participants for a distribution list 45

Figure 65: Edit distribution list 45

Figure 66: Edit or delete distribution list 46

Figure 67: Columns can be moved around in the result list 47

Figure 68: Sorting the columns displayed in the result list 47

Figure 69: Open the column selector..... 48

Figure 70: The column selector 49