



**F2**

# Group Request

Version 9

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# Reading guide

This manual is written for users of F2 Group Request.

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

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

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

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

We hope you enjoy using F2.

# Introduction to F2 Group Request

A request is a method to formally ask a user or a unit to carry out a task.

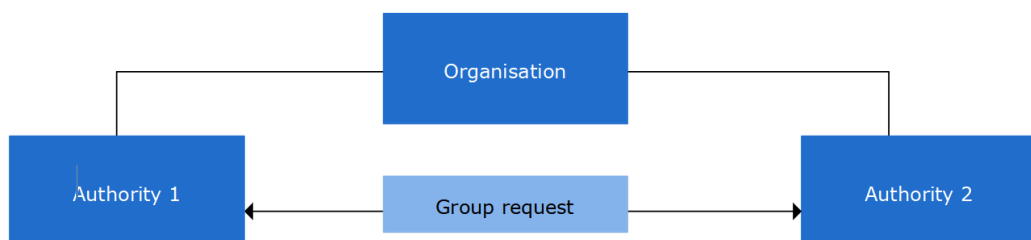
Three types of request can be made in F2:

- **Internal request**  
An internal request is a formalised way of requesting that a job be done within an authority.
- **Group request (add-on module)**  
A group request is sent within one F2 installation, but between different authorities.
- **External request (add-on module)**  
An external request is sent between F2 systems, i.e. across installations.

This manual describes the group request and how it differs from internal requests. For more information about requests in general, the fundamental functionality of the request window, and the internal request, see *F2 Request – User manual*.

Group requests are sent between users or units in different authorities, but within one F2 installation. For further information on installations and authorities, see *F2 Desktop – Administrator*.

When you create a group request, F2 automatically creates a new record to which the group request is attached. When sent, a user or unit in the receiving authority receives the record with the group request. The group request is managed in the receiving authority and then returned to the sender authority.



**Figure 1: Group request between two authorities**

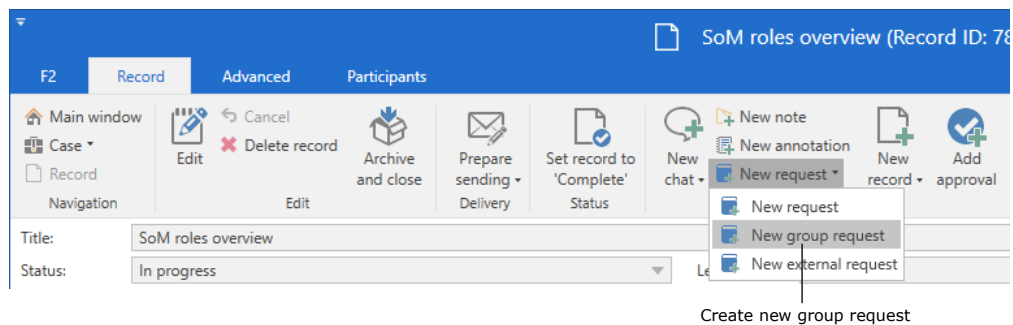
Group requests are sent between authorities in the same F2 installation. However, it is possible to send a group request to an external system via a virtual authority. For more information, see *Sending group requests to third party systems*.

# Group requests

This section describes how a group request is created, sent, received, executed, and finalised.

## Creating a group request

The group request must be created on a record in read-only mode. Create a new group request by clicking on the down arrow next to **New request** and then on **New group request** in the drop-down menu.



**Figure 2: Creating a new group request**

**Note:** Requests can only be created on records with the “In progress” status. The **New request** menu item is deactivated for completed records.

Click on **New group request** to open the “Request number [no. of request]” window. The “Return to” field is already filled in with the request creator’s name, and the checkbox “Notify creator and ‘Return to’ upon executed” is automatically ticked.

**Figure 3: The group request creation window**

**Note:** The “Visible for unit” checkbox next to “Additional recipients (0)” only appears when a user is added to the “Request recipient” field.

The request creator fills in the following fields before sending the group request.

Field	Description
“Request recipient”	The user or unit who receives the request.  <b>Note:</b> Group requests can only have one recipient. The recipient must be a participant from a different authority in the same F2 organisation and must have an associated email address.
“Visible for unit”	Tick this box to make the request visible to users in the request recipient’s unit.
“Request types”	Click the <b>drop-down arrow</b> to display a list of request types. The options depend on the setup of F2. More than one option may be selected.
“Deadline”	The date (and, optionally, time) indicating the deadline of the request’s execution.  The deadline affects how and where the request appears in the lists of requester and recipient, allowing users in the organisation to sort requests by deadlines. Enter a date, click on the calendar icon, or write e.g. “+7” to set the deadline to seven days.

Field	Description
"Add internal deadline"	<p>The requester, recipient, or executor may add an internal deadline to a request.</p> <p>The internal deadline is primarily used by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed.</p> <p>The request icon changes colour depending on the internal deadline, which is suggested as the deadline for the answer record. The internal deadline is added in the same way as the formal deadline.</p> <p>The internal deadline takes precedence over the formal deadline, except in the group request log whose deadline always adheres to the formal deadline.</p> <p>The internal deadline is not synchronised. This means that the request creator's internal deadline is not visible to the request recipient nor does it affect any internal deadline set by the request recipient.</p>
"Return to"	<p>Shows to whom the group request is sent upon execution. When the request is created, the requester is automatically added to this field. If the requester does not want to receive the executed request, they can specify another user here before sending the request.</p>
"Notify creator and 'Return to' upon executed"	<p>Tick this box to have the group request appear in the inboxes of the requester and the user specified in the "Return to" field upon execution.</p> <p><b>Note:</b> F2 can be configured to tick this box automatically. This configuration is made in cooperation with cBrain.</p>
"Contributors"	<p>In addition to the request recipient, it is possible to add one or more contributors to the group request. A contributor is a user who contributes to the execution of the group request.</p> <p>Contributors will receive the request record as an email with a copy of the group request attached as a PDF file.</p>
"Standard description"	<p>Choose between text templates with predefined texts. The chosen template text is inserted in the description field.</p> <p><b>Note:</b> If no standard description templates have been created, this field is not visible. Templates are created in cooperation with cBrain.</p>
"Description"	<p>Text informing the recipient of requirements to the content of the reply. The specific options depend on the configuration of F2.</p>

Contributors Deadline Add internal deadline Request recipient

**Request number 94**

A group request is intended for placing a request in another authority. Creating a group request causes a forward record to be created with the group request attached. Press **Send** on this external request to send the request to the unit or person in the other authority you want to have the task performed. The deadline shows, when the task should be completed.

Request recipient: Request recipient Created by: Chester Clarkson 22-06-2021 10:03

Request types: Select request type

Deadline: Add internal deadline

Return to: Chester Clarkson (Department head, Quality)

Notify creator and 'Return to' upon executed

Contributors (0) Standard description:

Description

Description Notify upon execution Return to Request types

**Figure 4: Fields to fill in**

Click **Save** to create the request. Upon creation, a log is added in the upper right corner of the request window just as with internal requests. As with internal requests, group requests can be deleted without being sent, be cancelled after being sent, and saved continuously while the request is filled in. For more information about the request log and the functions available in the request window, see *F2 Request – User manual*.

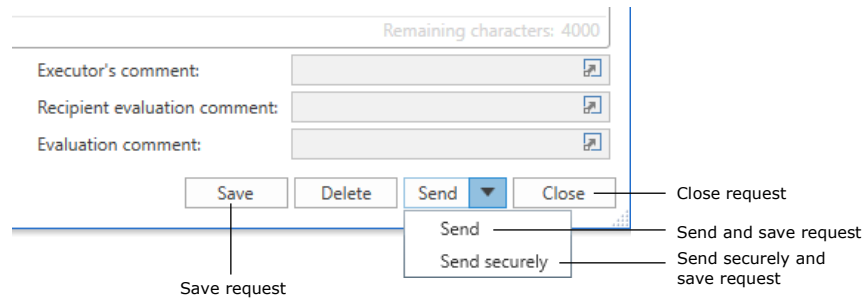
After clicking **Send**, the group request is sent as an email. This means the record document cannot be edited post-sending, and that the recipient receives a copy of the original request record. In other words, metadata, notes on the record, and other similar information are not sent.

The recipient receives the group request in their F2 inbox. Any contributors receive a copy of the request in their own inboxes.

If the request can be sent immediately, saving before clicking **Send** is not necessary. The request is automatically saved when sent.

The group request can be sent securely to a third party system through a virtual authority. To do this, click the **down arrow** in the "Send" field and select **Send securely** in the drop-down menu. For more information about sending group requests through virtual authorities, see *Sending group requests to third party systems*. For more information about sending securely, see *F2 Desktop – Records and Communication*.

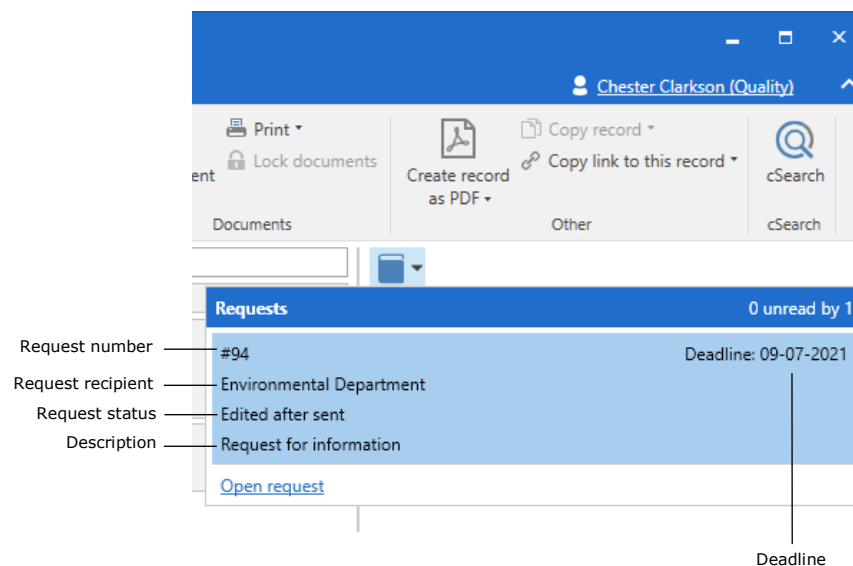




**Figure 5: Request creator's options**

**Note:** The **Send securely** function is not deactivated for regular group requests, but using it does not affect the sending. This is because sending a regular group request within an F2 installation is already a secure process.

When a group request is created, it can be seen and accessed from the record to which it is attached. Open the group request by clicking the request icon at the top of the document area. An overview of the group request is shown. Click anywhere in the overview to open the full request window.



**Figure 6: Click the request icon to see the request overview**

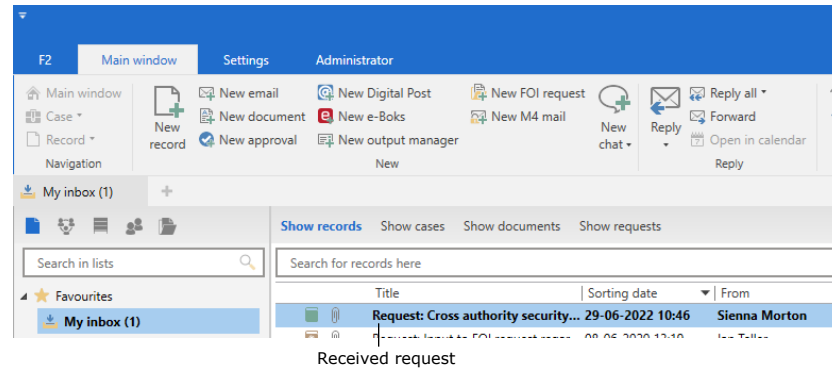
The overview shows request number, deadline, request recipient(s), status, and the first part of the description for each request. Request numbers are assigned automatically and chronologically.

Group requests always have a request data file attached. The data file identifies the executed request as an answer when returned to the request creator's authority in F2. For more information, see the section *Sending group requests to third party systems*.

**Note:** Only one group request can be created on a record. If an additional group request or an external request is created on a record, F2 automatically creates a new record named "Request: Request: [title of the original record]" with the new group request. Any attached documents are automatically copied to the new request record.

## Receiving and accepting a request

When a request is sent, the recipient receives it in their inbox.



**Figure 7: The received request in the recipient's inbox**

Double-click the unread record to open the group request.

If a record with any kind of request is unread, the request window automatically appears when the record is opened. If the request has already been accepted, it is marked as read and can be accessed by double-clicking the record's request icon.

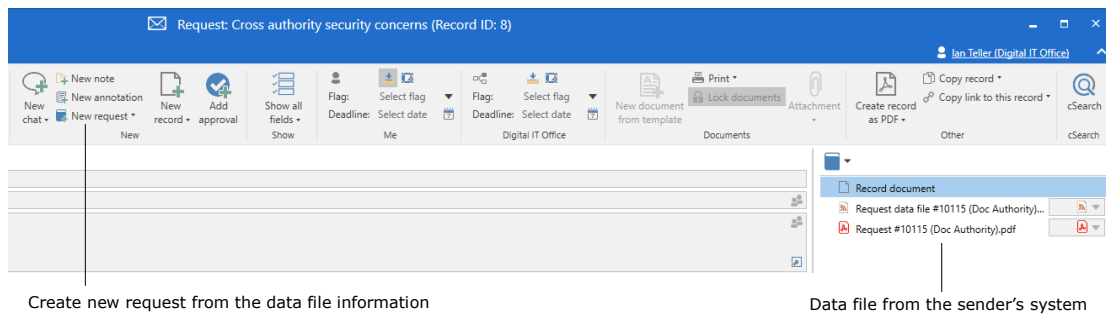
**Figure 8: The received request**

After receiving the request, the recipient has the same options as with internal requests except for the **Distribute** function. The group request can be accepted by clicking **Accept and close** or **Accept**, the request can be evaluated by clicking **Evaluate...** at the bottom of the window, and finally, the request can be forwarded by filling in the "To be executed by" field and clicking **Save**. For more information about these options, see *F2 Request – User manual*.

## Internal request based on a group request

If the group request recipient has access to the F2 Request add-on module, they can create an internal request based on the attached data file sent by the sender authority.

To do this, click **New request** in the ribbon of the received email record. This opens a new request window wherein the fields "Deadline", "Description", and "Return to" have already been filled in with information retrieved from the attached data file. Additionally, the "Request types" field may be filled in if the recipient authority recognises the request type(s) selected by the sender authority during creation of the group request.



**Figure 9: Creating a request based on the data file**

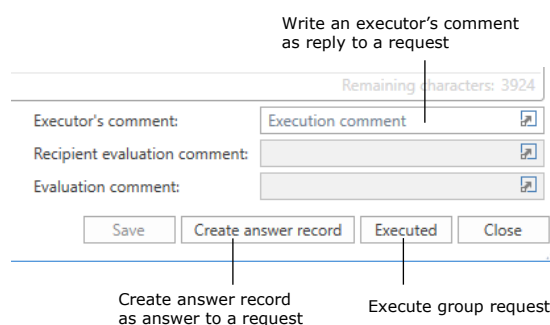
## Replying to a group request

A group request is replied to in one of the following ways:

- Execute the group request by replying to it directly in the request window as with internal requests.
- Reply to the request by creating and sending an answer record with **Create answer record** in the request window. The process of creating an answer record differs slightly from the process of answering regular requests. This will be further elaborated in the following section.

Note that it is possible to click **Create answer record** before accepting the request. It may be practical to begin working on it even though the terms and conditions of the request have not yet been finalised.

**Note:** As with internal requests, it is possible to select an existing record and attaching it as an answer record. However, for group requests this function is intended for the requester and not the group request recipient. See *Selecting a record as answer to a request* for further information.



**Figure 10: Reply options in the request window**

## Creating an answer record

The request can be answered by creating an answer record. Click on **Create answer record**, and the "New record" dialogue opens. F2 automatically suggests "Re: [title of the request]" as the title of the new record. See below.

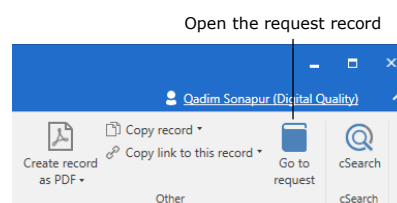
**Figure 11: Creating an answer record**

If the group request record is attached to a case within the recipient authority, F2 automatically suggests linking the answer record to the same case. The answer record will have the same deadline as the request. If a request has both an internal and a formal deadline, the answer record will be assigned the former. Click **OK** to create the answer record.

An approval can be added to the answer record from the dialogue. In this case, F2 suggests the request deadline or any internal deadlines as the approval deadline. For more information about creating approvals, see *F2 Approvals – User manual*.

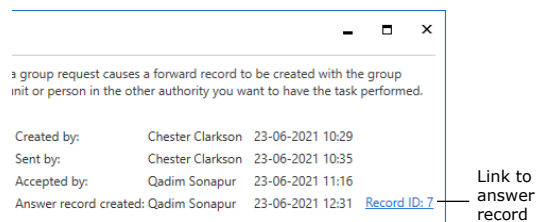
The answer record is automatically addressed to the user in the “Return to” field, who receives it in their inbox when the recipient clicks **Send** in the ribbon of the record window.

Navigation between the answer record and the group request record is facilitated by a request icon in the answer record’s ribbon. This **Go to request** icon opens the record with the group request.



**Figure 12: Open request record from answer record**

Similarly, the answer record can be accessed from the group request itself. Click the record ID link displayed next to the “Answer record created” entry in the group request log to access the answer record, as shown below.



**Figure 13: Link to the answer record in the request log**

Once the answer record has been sent, click on **Execute** in the group request window. The user listed in the "Return to" field then receives both the answer record and the group request record in their inbox.

**Note: Execute** indicates that the request executor/recipient has executed the requested task. The request is only completed once the request creator or "Return to" user has finalised the executed request.

An executed group request is no longer listed in the "F2 Requests to unit" list of the request recipient. For more information about this list, see *F2 Request – User manual*.

### Selecting a record as answer to a request

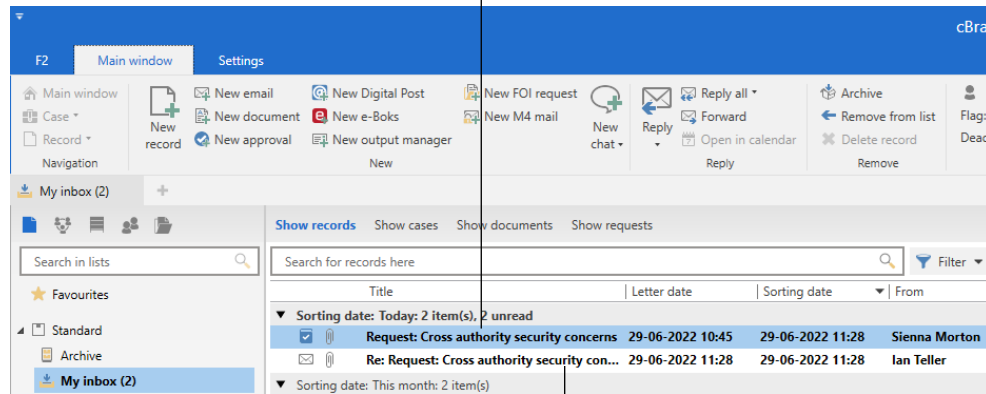
As opposed to an internal request, this function is intended for use by the "Return to" user and not the executor. It is a way for the "Return to" user to link an incoming record from the executor to the request record if the executor has not already specified it as an answer record.

For further information on this, see *F2 Request – User manual*.

### Finalising a group request

The executed group request is sent to the "Return to" user's inbox.

The request record is marked as unread upon execution



The answer record is received as an email in the inbox

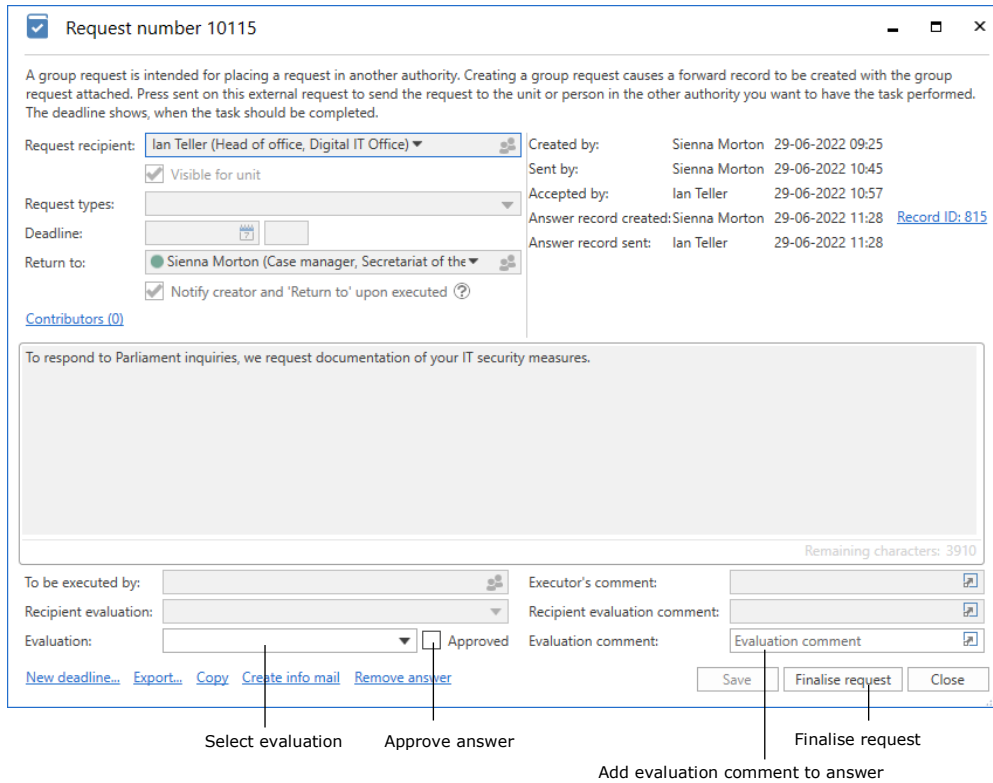
**Figure 14: The executed request and answer record**

If an answer record has been created from the group request window and sent as an email to the "Return to" user, said record is associated with the same case as the original request record in the requester's authority.

The group request can then be processed by the "Return to" user with an evaluation, an evaluation comment, an approval, or any combination of these. This is similar to an internal request.

When the answer to the group request is processed, click **Finalise request**. The group request is then completed.

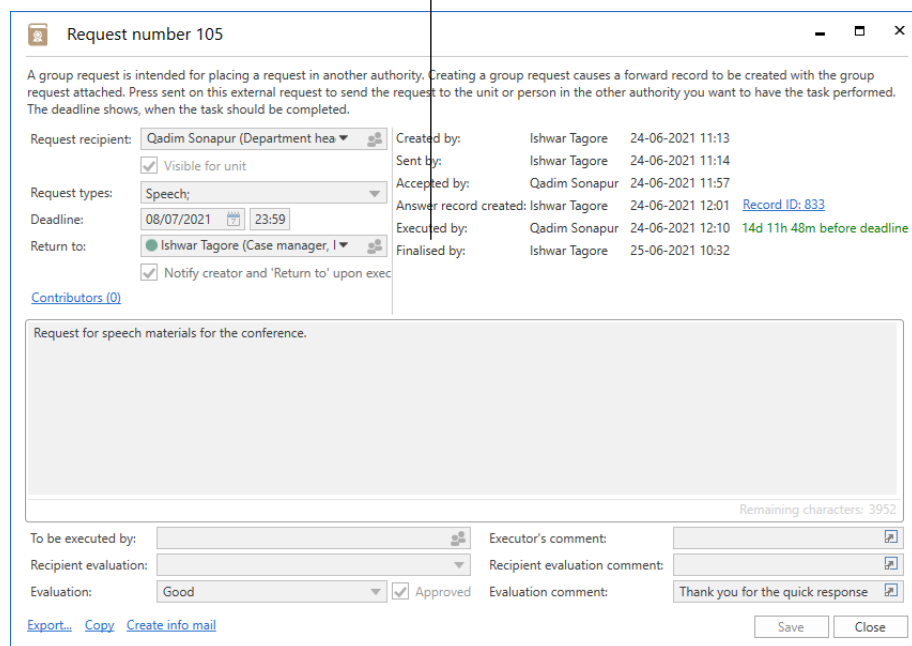
**Note:** The "Before deadline" log entry, which is shown when the group request has been executed, is based on the formal deadline of the group request and not an internal deadline.



**Figure 15: Request window for the executed request**

Once the "Return to" user has finalised the group request, it is registered in the log.


The group request has been finalised



**Figure 16: The finalised group request**



The request's approval status, evaluation, and evaluation comment are then visible to the request recipient.

**Note:** The requester can finalise the group request at any time. This changes the request icon to finalised .

**Note:** F2 can be configured to either allow all users to finalise requests or only users in the requester's unit.

When the group request has been finalised, it disappears from the "F2 Requests from unit" list.

Finalised requests can still be viewed and accessed in F2's main window. For further information about the default lists and searching for finalised requests, see the *F2 Request – User manual*.

## Extra functions

In addition to the above, F2 Group Request offers a number of extra functions. These practical tools are summarised in this section. Full descriptions of the functions are available in the *F2 Request – User manual*.

At the bottom left of the group request window, a number of extra functions are available. The available functions depend on the status of the request – for example, **Remove answer** is only available if an answer record has been added. The following functions are available to group requests:

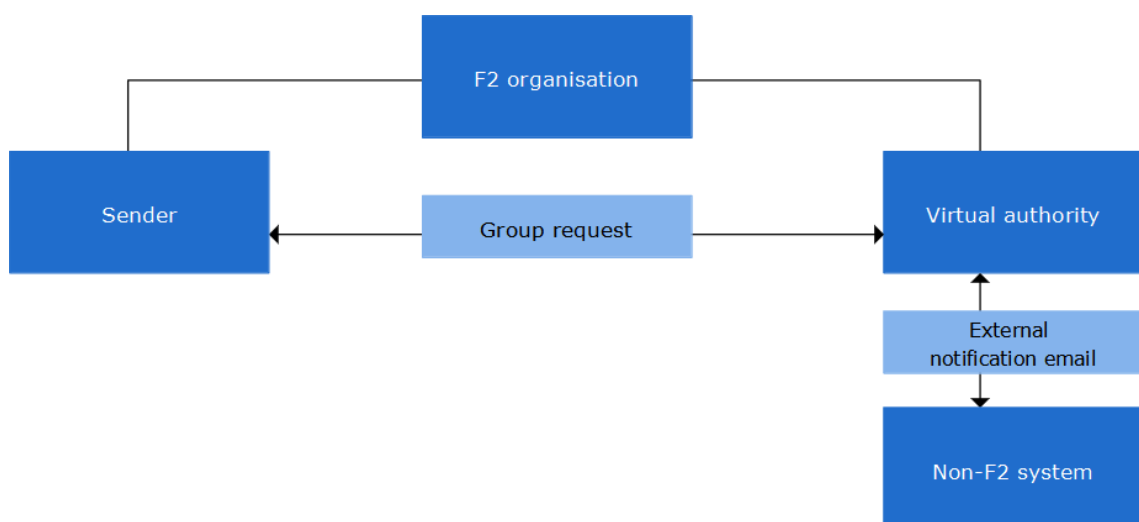
- Finalise now
- New deadline
- New recipient
- Export
- Copy
- Create info mail
- Remove answer.

## Sending group requests to third party systems

F2 Group Request makes it possible to send a group request to systems outside of F2, i.e. third party systems. A virtual authority must be added to the F2 installation to represent the system outside F2 that is to receive the request.

When a group request is sent, it is received by the virtual authority representing the third party system. F2 then forwards the group request as an external notification email to the system outside of F2.

From here, the group request can be managed in the external system. When sent back, it is received by the virtual authority which forwards it to the sender authority in F2. For more information about setting up external notification emails, see *F2 Desktop – Administrator*.



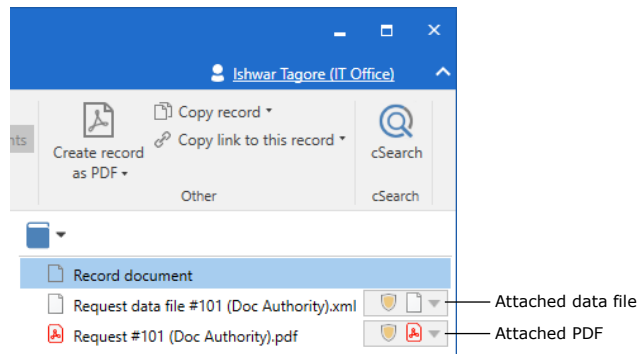
**Figure 17: Group request to an external system**

The option of sending a group request to a third party system makes it an effective and flexible tool for cooperation between authorities within and outside the F2 organisation. By sending a group request to an external participant's email address, users in the recipient authority are able to receive and process the group request in e.g. Outlook.

**Note:** An organisation that does not use F2 can receive group requests from an F2 installation via email. When the non-F2 organisation replies to the group request, the reply is sent as an email rather than a group request.

When the request creator clicks **Send**, the group request is sent as an email with the record's documents attached.

Additionally, F2 attaches a request data file to the email. The data file makes the executed group request recognisable as a request reply once returned to the sender authority's F2.



**Figure 18: Request data file and request as PDF on external notification email**

When the email containing the request data file is sent to F2, it is automatically recognised as an answer record. Consequently, the group request log will contain a link to the answer record, while a dedicated menu item for navigating to the group request is added to the answer record itself. For more information about answer records, see *Creating an answer record*.

**Note:** The data file must be attached to the group request's reply sent to the sender authority's F2. Otherwise F2 cannot recognise the reply as a group request.

## Configurations for F2 Group Request

F2 Group request can be configured to fit the needs of the individual organisation. The following functions can be configured in cooperation with cBrain:

- Automatically tick the checkbox "Notify creator and 'Return to' upon executed" when creating a new request.
- Enable the **Evaluate...** button and its associated evaluation fields. It is also possible to choose whether the fields can be filled in by all users or only the request recipient and the "Return to" user.
- Use the request record's deadline rather than the request's deadline as record and approval deadline for the answer record, and use the request deadline rather than the request record's deadline as reminder date.
- Allow a request to be finalised by all users or only by those in the request creator's unit.

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