cBRAIN

F2

Group
Request

Version 7

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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:

- **Regular request**

  A regular 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 regular requests. For more information about requests in general, the fundamental functionality of the request window, and the regular request, see *F2 Request – User manual*.

In addition, see *F2 External request – User manual* for information about external requests.

Unlike regular requests, group requests are sent between users or units in different authorities, but still within the same F2 installation. For further information on installations and authorities, see *F2 Desktop – Administrator*.

When a group request is created, a new record to which the group request is linked is automatically created. When sent, a user or unit in the receiving authority receives the group request. The group request is managed in the receiving authority and then returned to the sender authority.
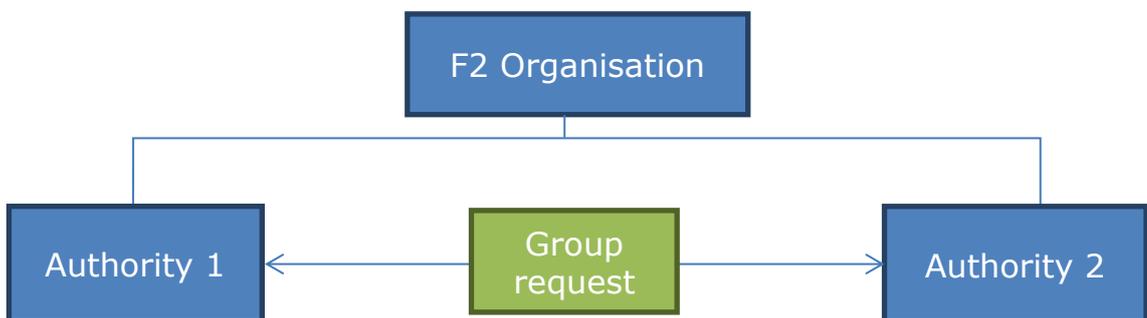

Figure 1: Group request between two authorities

Group requests can only be 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 the section *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.

Only one group request can be linked to a record at a time. If a second group request or an external request is created on a record with one already linked, a new record named "Request: [title of the original record]" is automatically created with the new group request linked. Any attached documents are automatically copied to the new request record.
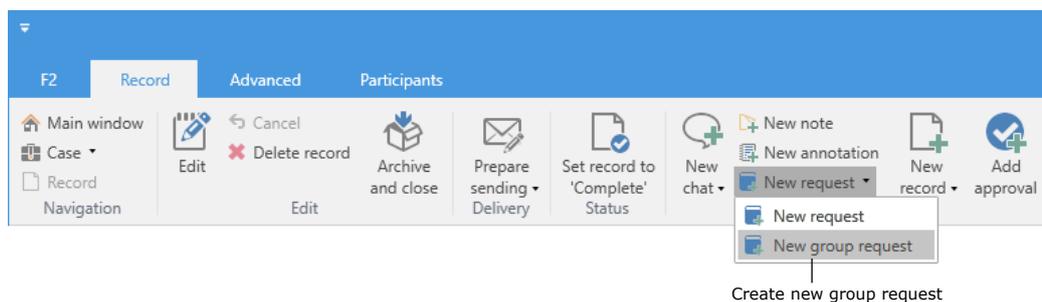

Figure 2: Creating a new group request

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

When **New group request** is clicked, a new group request window titled "Request [number of request]" opens. Two fields are filled in automatically: "Return to" which contains the request creator, and the "Notify creator and 'Return to' upon executed" check box, which is ticked.

Figure 3: The group request creation window

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

Field	Purpose
"Request recipient"	The user or unit who will receive the request. **Note**: 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.
"Request types"	Click the drop-down arrow 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 when the request is to be executed. 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 the date and, if needed, time in the field or click on the calendar icon. Alternatively, enter "+7" to set a deadline 7 days in the future.
"Add internal deadline"	The requester, recipient or executor may add an internal deadline to a request. The internal deadline is primarily used by the request recipient, whereas the formal deadline indicates when the requester needs the request to be executed. The request icon changes colour depending on the internal

Field	Purpose
	deadline, which is suggested as the deadline for the answer record. The internal deadline is added in the same way as the formal deadline.
	The internal deadline takes precedence over the formal deadline, except in the request history log whose deadline always adheres to the formal deadline.
	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.
"Return to"	Shows to whom the request is sent when executed. Upon creation of the request, the requester is automatically specified in this field. If the requester does not want to receive the request reply, they can specify another user here before sending the request.
"Notify creator and 'Return to' upon executed"	If this box is ticked, the request will appear in the inboxes of the requester and the user specified in the "Return to" field when it has been executed.
	Note: An organisation may choose that F2 automatically ticks this box upon request creation. This must be configured by cBrain.
"Contributors"	In addition to the request recipient, it is possible to add one or more contributors on the request. A contributor is a user who contributes to the execution of the group request.
	Contributors will receive the request record as an email with a copy of the group request attached as a PDF file.
"Standard description"	Choose between text templates with predefined texts. The chosen template text is inserted in the description field.
	Note: If no standard description template has been created, this field is not visible. Templates are created by cBrain.
"Description"	Text informing the recipient of requirements to the content of the reply.
	If no standard descriptions exist, or the request creator wishes to manually fill in the "Description" field, text can be entered directly in the field to e.g. describe the purpose of the task.

Figure 4: Fields to fill in

Click **Save** to create the request. Upon creation, a history log is added in the top right corner of the request window just as with regular requests. As with regular requests, group requests can be deleted without being sent, be cancelled after being sent, and saved continuously while the request is filled out. For more information about the history 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 when sending to a third party system via a virtual authority. To do this, click the down arrow in the "Send" field and select **Send secured** in the drop-down menu. For more information about sending group requests through virtual authorities, see the section *Sending group requests to third party systems*, and about sending securely, see the *F2 Desktop – Records and Communications* user manual.
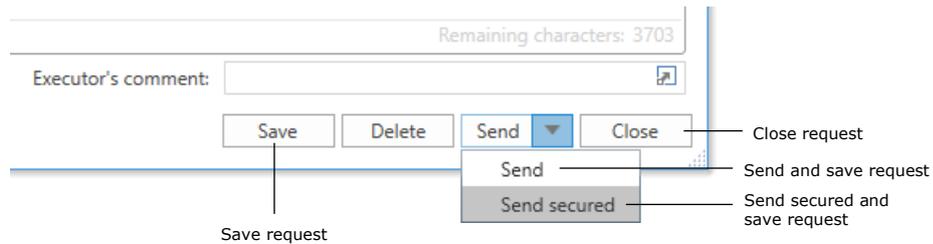
Figure 5: Request creator's options

> **Note**: **Send secured** can be clicked even when sending a regular group request, but this has no practical effect. The security of sending within an F2 installation is already comparably high.

When a group request is created, it can be seen and accessed from the record to which it is linked. Open the group request by clicking the request icon at the top of the document selector. An overview of the group request is shown. Click anywhere in the overview to open the full request window.
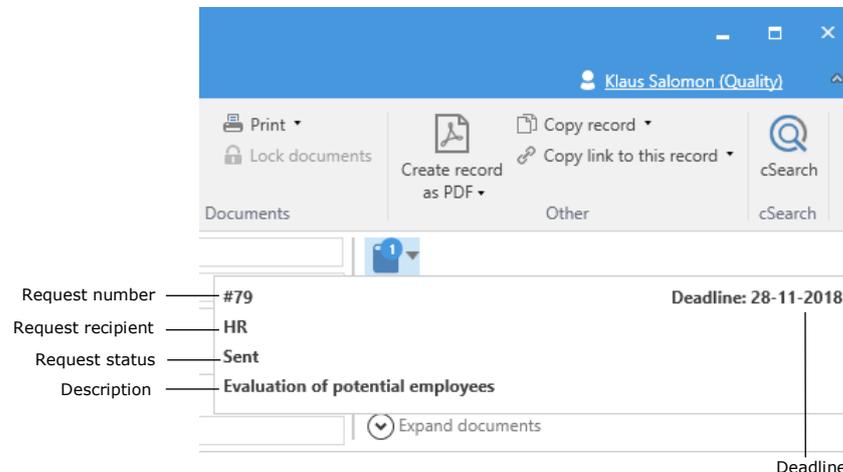
Figure 6: Click the request icon to see the request overview

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.*

Receiving and accepting a request

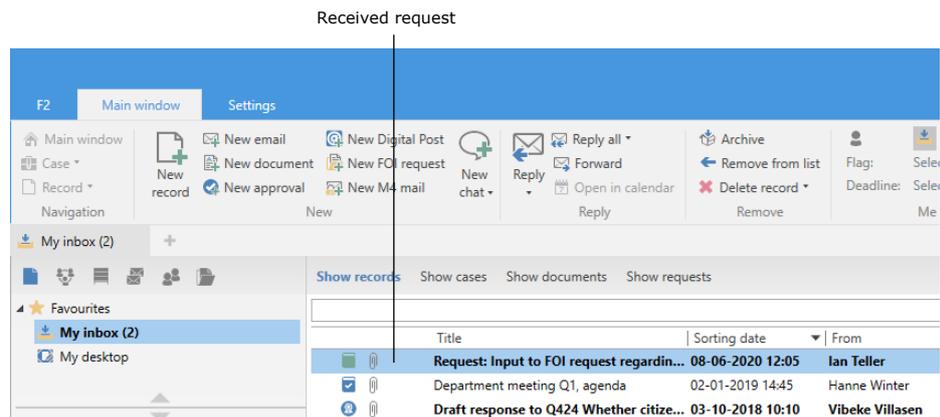When a request is sent, the recipient receives it in their inbox.

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

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

If a record with a request is unread, the request window automatically appears when the record is opened. If the group request has already been accepted, the request is marked as read and can be accessed by double-clicking the request icon in the record.
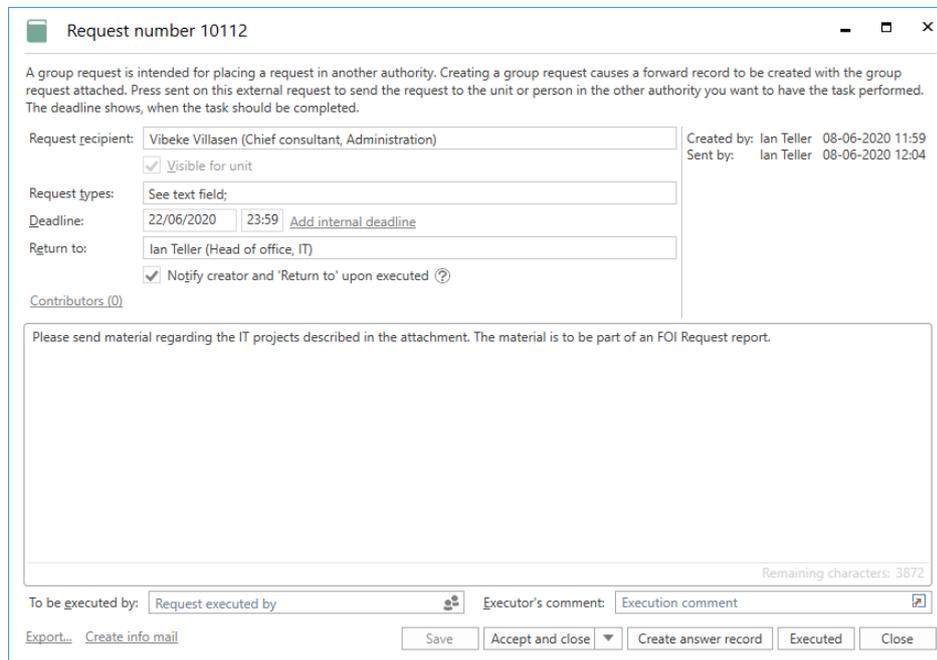

Figure 8: The received request

After receiving the request, the recipient has the same options as with regular requests. 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 **Distribute**. 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.

Create new request from the data file information   Data file from the sender's system
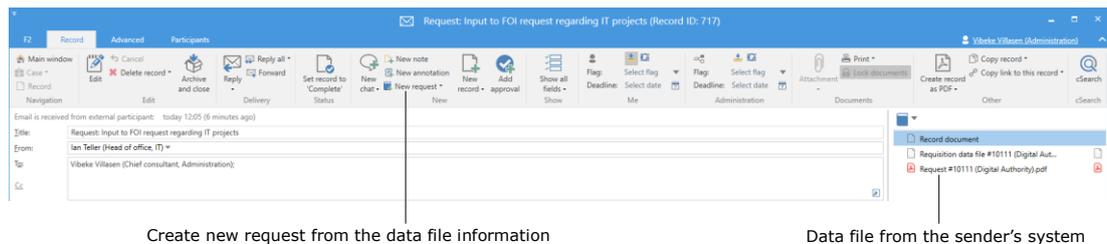
Figure 9: Creating a request based on the data file

Replying to a request

A group request is replied to in one of three ways:

- Execute the group request by replying to it directly in the request window as with regular 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 the reply even though the terms and conditions of the request have not yet been finalised.

- Reply to the group request by selecting an existing record and attaching it as a reply to the request as with regular requests.
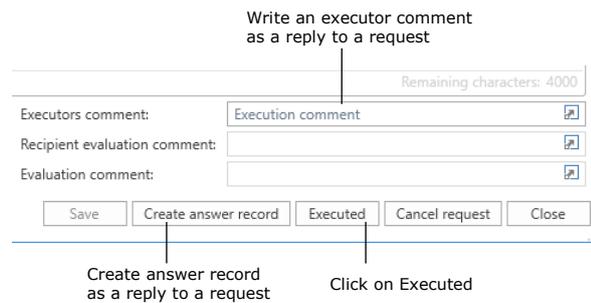
Figure 10: Reply options in the request window

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: [name of the request]" as the title of the new record. See below.
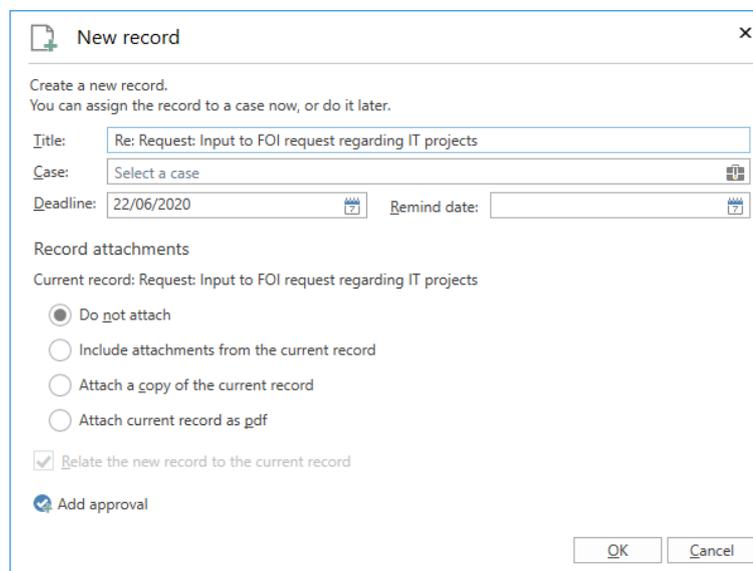

Figure 11: Creating an answer record

If the group request record is linked 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 will receive it in their inbox when the recipient clicks **Send** in the ribbon of the record window.

Navigation between the answer record and the record to which the group request is linked is facilitated by a request icon in the answer record's ribbon. This "Go to request" icon opens the record with the group request.
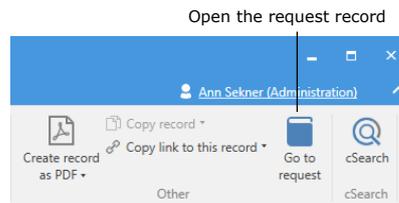

Figure 12: Navigation between answer record and request record

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 history log of the group request to access the answer record, as shown below.
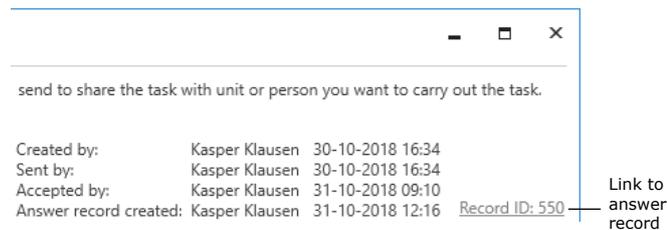
Figure 13: Link to the answer record in the request log

Once the group request has been answered by either sending an answer record or entering a reply in the "Executors comment" field, click on **Execute**. The group request and any linked answer record is then sent to the inbox of the user listed in the "Return to" field.

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.

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

Finalising a request

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

The request record is marked as unread when the answer record is attached
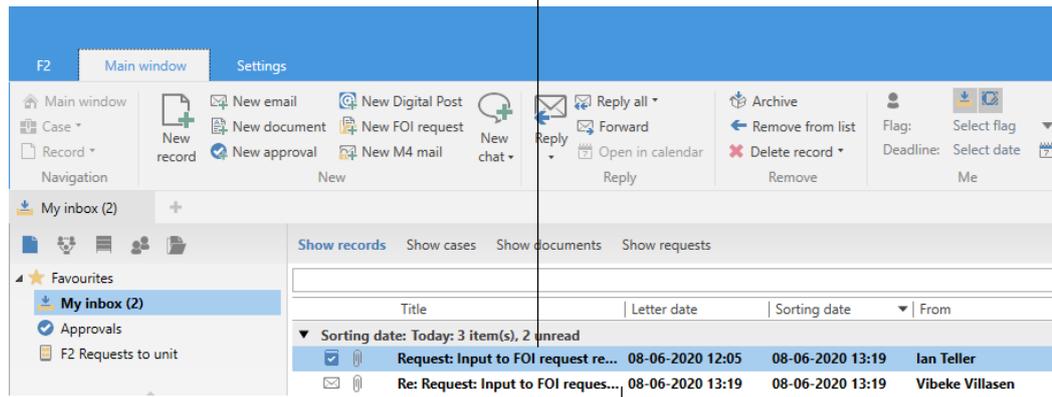
The answer record is received as an email in the inbox

Figure 14: The executed request and answer record

If the group request has been answered with an answer record, said record will be sent as an email and put on the same case as the original request record.

Work on the group request is completed by the user, to whom the request was returned to, with an evaluation, an evaluation comment, an approval, or any combination of these. These are done in the same way as with regular requests.

After completing work on the answer to the group request, click **Set request to 'Finalised'**. The group request is thus finalised by the "Return to"-user.

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

Select evaluation   Approve answer   Finalise request

Add evaluation comment to answer

Figure 15: Request window for the executed request

Once the group request is finalised, it will appear in the history log.

The group request has been finalised

Figure 16: Request window of the finalised request

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

> **Note**: The requester can finalise the group request at any time. This changes the request icon to the 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 *F2 Request – User manual*.

Additional functions

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

At the bottom left of the group request window, a number of additional functions are available. The available functions depend on the status of the request – for instance, **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 from F2, the authority representing the third party system receives it. F2 then forwards the group request as an external notification mail to the system outside of F2.

From here, the group request can be managed in the system, and upon execution the virtual authority receives it and forwards it to the sender authority in F2. For more information about setting up external notification emails, see *F2 Desktop – Administrator*.
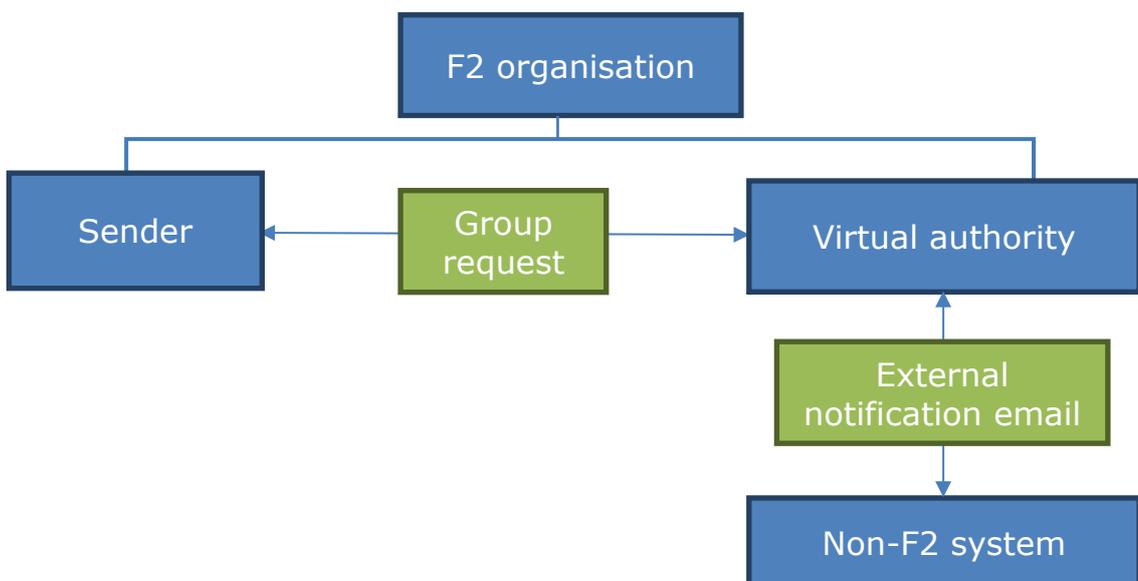

Figure 17: Group request for an external system

This makes group requests an effective and flexible tool for cooperation between authorities within and outside the F2 organisation.

It is thus possible to send group request to an external participant's email address, which means recipients in the recipient authority can receive and answer group requests using Outlook or other systems.

> **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, a request data file is attached to the email. The data file makes the executed group request recognisable as a request reply once returned to the sender authority's F2.
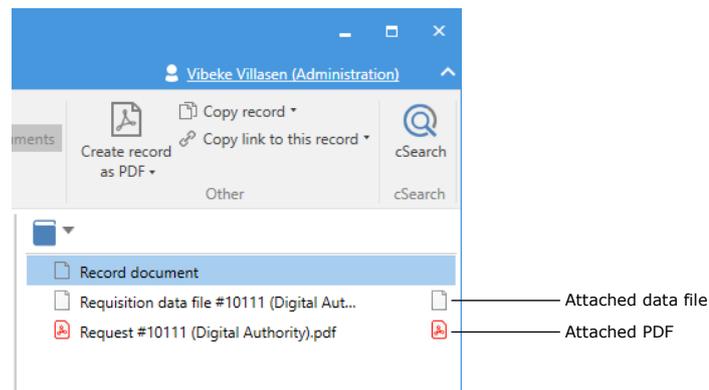

Figure 18: The request data file and the request as a PDF on an external notification mail

When the email containing the request data file is sent to F2, it is automatically recognised as an answer record. Consequently, the group request's history 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 the section *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 will not be able to 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:

- Whether the checkbox "Notify creator and 'Return to' upon executed" is automatically ticked when a new request is created.

- Whether the **Evaluate...** button and its associated evaluation fields are enabled. It is also possible to set up whether the fields can be filled out by all users or only the request recipient and the "Return to" user.

- Set up whether the request record's deadline rather than the request's deadline should be set as record and approval deadline for the answer record, while the request deadline rather than the request record's deadline is set as reminder date.

- Set up whether a request can be finalised by all users or only by those in the request creator's unit.

List of Figures