



**F2**

Touch

Version 7

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# Reading instructions

This manual is written for users of F2 Touch.

The manual contains a short introduction to F2 Touch 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 Touch

F2 Touch supports case work on the go across different devices such as iPhones, iPads, and Android smartphones and tablets, as well as common Internet browsers for PC and Mac.

F2 Touch can be downloaded as an app using either Apple App Store or Google Play. The F2 Touch client also functions in the browsers of the above mentioned mobile devices. This manual is primarily based on the F2 Touch app.

F2 Touch is a lighter version of F2 Desktop containing selected functions such as case and email processing, chats, approvals, requests and more. There are minor differences in the functionality between F2 Desktop and F2 Touch. These differences are described where relevant.

F2 Touch supports two different layouts that are automatically selected depending on the size of the window that is used:

- **Compact layout:** For devices with smaller screens e.g. smartphones such as iPhones and Android phones.
- **Wide layout:** For devices with larger screens like iPads, Android tablets, Mac, and PC.

There are no functionality differences between the compact and the wide layout. This manual is primarily based on an iPhone version and the compact layout. If there is a variation between iPhone and Android, it will be mentioned.

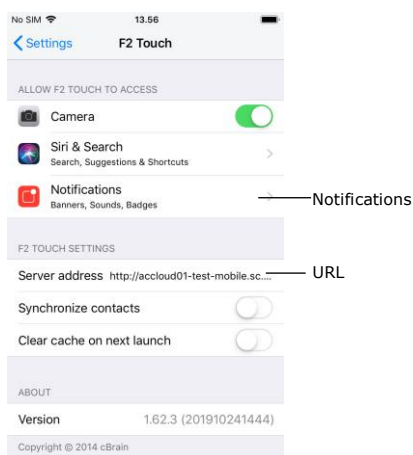
# Download and set up F2 Touch

F2 Touch is available in the Apple App Store for iPhone and in Google Play for Android.


As settings and setup vary according to the operating system of the device, the following sections have been divided into the two operating systems: *Setup and settings for iOS* and *Setup and settings for Android*.

## Setup and settings for iOS

In order to use F2 Touch, the app must first be set up to the correct server address.

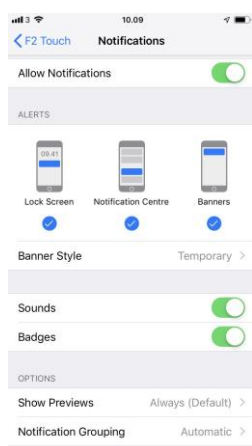


**Figure 1: Server address on iOS**

To set up F2 Touch on an iPhone or iPad, tap **Settings**  on the device.

Tap **F2 Touch** in the menu and the screen in the figure to the left appears.

Next to the "Server Address" field, enter the URL for F2 Touch. The URL is provided by cBrain.



**Figure 2: Notification setup for iOS**

Tap **Notifications** to open the settings as shown in the figure to the left.

Here it is possible to choose which messages F2 Touch is allowed to display on the iOS device.

## Log in to F2 Touch on iOS

When F2 Touch is set up and the app is opened, a login screen appears. Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using one's password, fingerprints or Face ID, or by selecting "Remember me". The desired method is chosen upon login.

If the "fingerprint" or "Face ID" login features are enabled in addition to "Remember me" in the organisation's configuration, the user can choose which login method to use. It is possible to switch between the different options as long as the configuration allows it.

For safety reasons a user must enter their password every 30 days.

### Log in using password on iOS

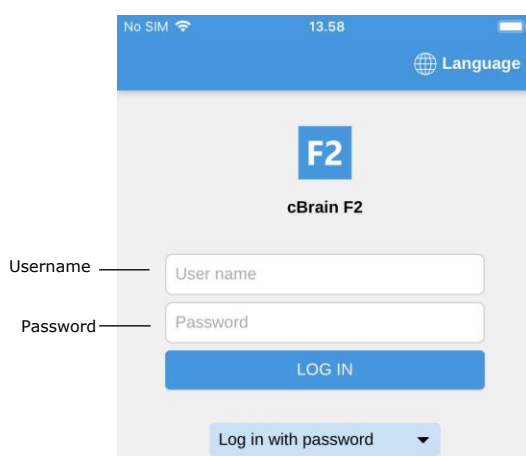


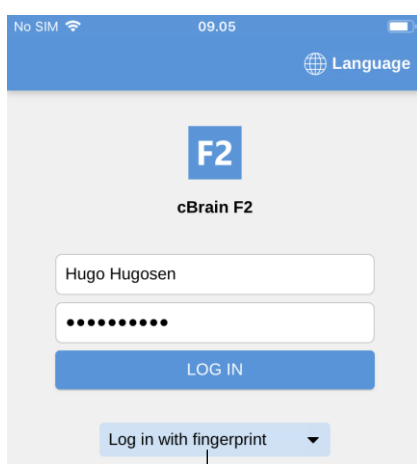
Figure 3: Log in using password

It is possible to log in using a password as when using F2 Desktop.

Fill in the "Username" and "Password" fields, using the same information used to log in to F2 Desktop.

Then tap **Log in** to log in.

### Log in using Touch ID on iOS



Select "Log in with finger print" in the menu

Figure 4: Activate Touch ID

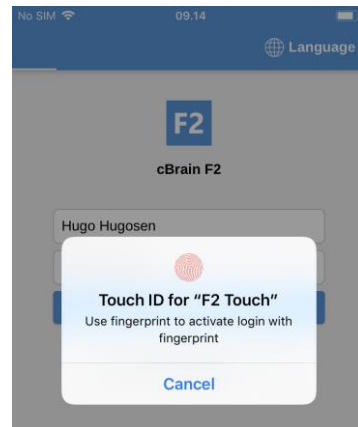
Devices such as iPhone 5S or newer models support Touch ID (fingerprint).

**Note:** Touch ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option "Log in with fingerprint" in the dropdown menu, as shown in the figure to the left. The user's finger is then scanned to activate the fingerprint scanner.



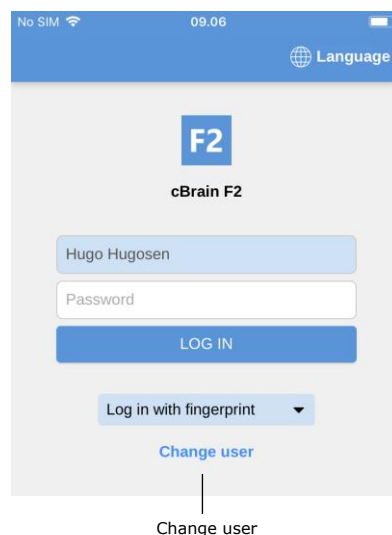
**Note:** Touch ID can only be activated after logging in using a password.



**Figure 5: Log in using Touch ID**

When Touch ID is enabled, the finger is scanned to log in to F2 Touch. The figure on the left illustrates the login screen when using the fingerprint login option.

Unsuccessful Touch ID login attempts are handled by the device's operating system. iOS allows three failed login attempts, after which the password must be entered. Tap **Cancel** to return to the login screen.



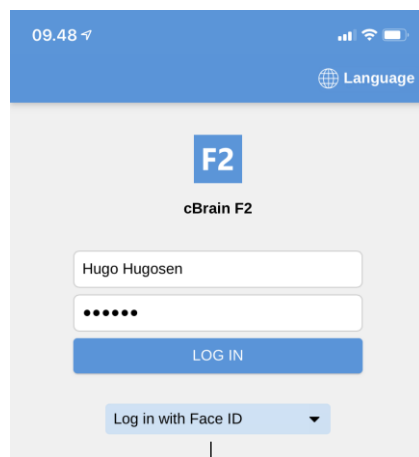
**Figure 6: Change user**

If a user cancels the login and returns to the login screen, F2 Touch allows the user to change user as shown in the figure to the left.

Tap **Change user** and enter the new login details. Then tap **Log in**.

## Log in using Face ID

F2 Touch for iOS supports Face ID on iPhone X (or newer), which makes it possible to log in to F2 Touch using facial recognition.



Select "Log in with Face ID" in the menu

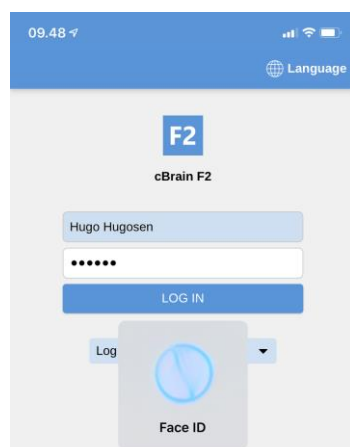
**Figure 7: Activate Face ID**

On devices such as the iPhone X or newer, it is possible to log in using Face ID.

**Note:** Face ID is activated through a configuration that is performed in cooperation with cBrain.

Enter username and password, and then select the option "Log in with Face ID" in the dropdown menu, as shown in the figure to the left. The user's face is then scanned to activate the scanner.

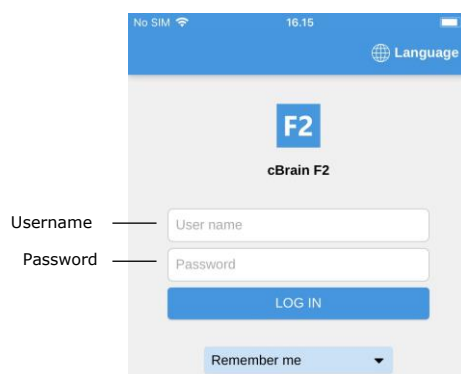
**Note:** Face ID can only be activated after logging in using a password.



**Figure 8: Log in using Face ID**

When Face ID is enabled, the face is scanned to log in to F2 Touch. The figure on the left illustrates the login screen when using the Face ID login option.

## Log in using "Remember me" on iOS



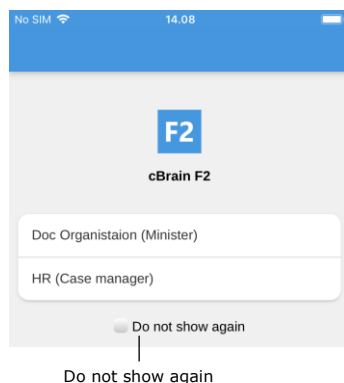
**Figure 9: Log in using "Remember me"**

When using the login method "Remember me", the user does not need to enter their login credentials every time they log in to F2 Touch.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

**Note:** The login page remembers the latest user, unless the user manually logs out of F2 Touch.

## The log in role selector



**Figure 10: Select role at login**

If a user has multiple roles in F2, it is possible to choose between them after entering the login information.

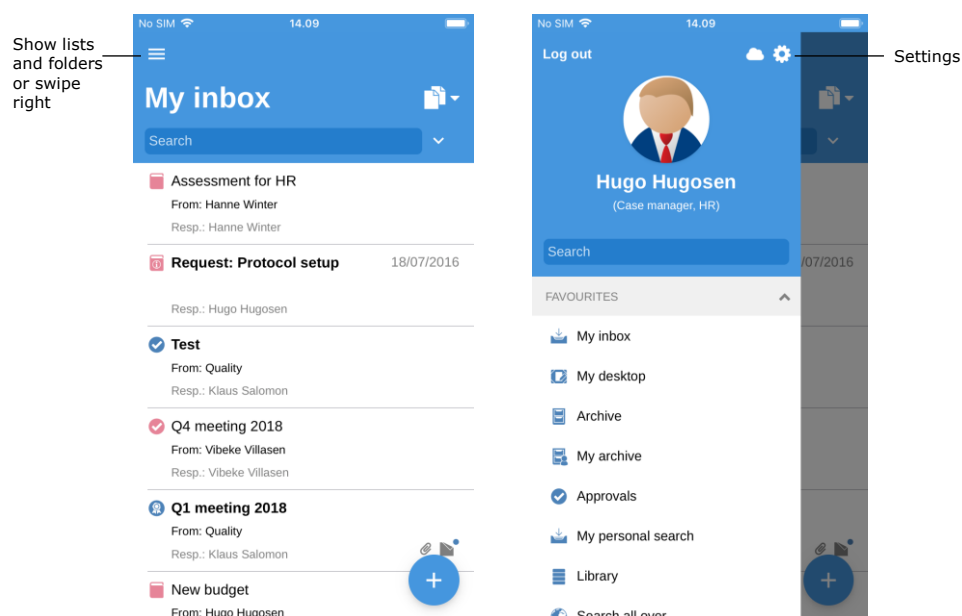
The user can tap "Do not show again" to avoid being presented with the role selector the next time they log in.

The user can select a default login role in the user setup menu item in F2 Desktop.

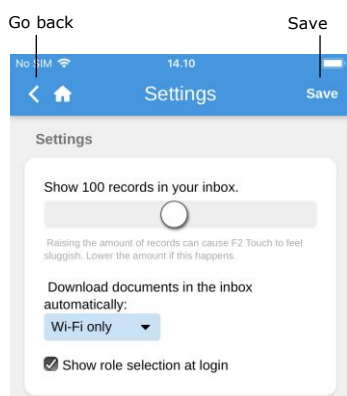
For more information about standard roles see the *F2 Desktop – Settings and setup* user manual.

## Personal settings on iOS

Personal settings can be adjusted in F2 Touch. To see the overview of lists and folders either swipe right on a list or tap the **menu icon**. Then tap on **Settings** in the top right corner.



**Figure 11: Open settings on iOS**



**Figure 12: iOS settings**

In "Settings" it is possible to e.g. increase/decrease the number of files shown in the inbox and to enable/disable the role selector upon login.

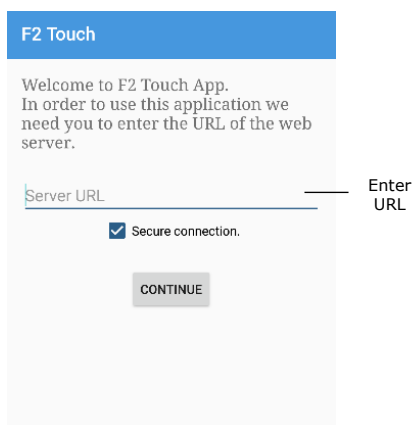
It is also possible to choose when to download documents in the inbox. There are three options:

- Always. Documents are downloaded whenever there is an Internet connection.
- Wi-Fi only. Documents are downloaded when the device has a Wi-Fi connection.
- Never. Documents are not downloaded.

Save the settings by tapping **Save**. Return to the former list by tapping  in the top left corner.

## Setup and settings for Android

In order to use F2 Touch, the app must first be set up to the correct server address.



**Figure 13: Server URL on Android**

The first time F2 Touch is opened on an Android device, it is displayed as shown in the figure to the left.

In the "Server URL" field, enter the URL for F2 Touch, provided by cBrain. Here the user can also choose whether or not to use a secure connection.

Then tap **Continue**.

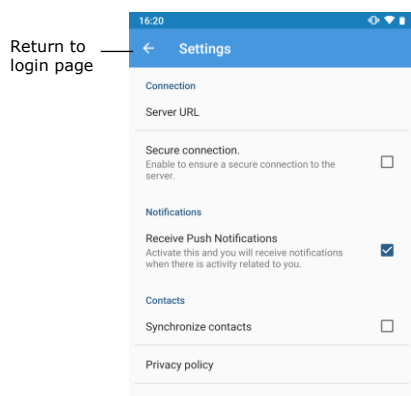
## Log in to F2 Touch on Android

When the F2 Touch server address is entered, a login screen appears. Depending on the setup and the device running the application, there are several ways to log in to F2 Touch: Using one's password or fingerprints, or by selecting "Remember me". The desired login method is chosen upon login.

The figure below illustrates the different login methods for F2 Touch on an Android device.


If the "Remember me" and fingerprint login features are both enabled in the organisation's configuration, the user can choose which login method to use.

It is possible to switch between the different options as long as the configuration allows it.



**Figure 14: Android settings**

Some settings can be set up before logging into F2 Touch.

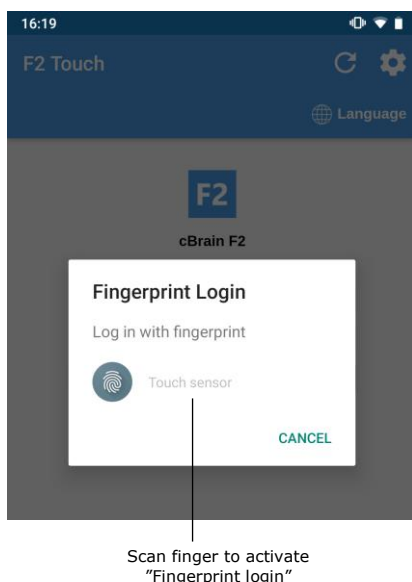
Tap **Settings**  in the upper right corner of the login page to open the settings.

Enter the server URL and choose whether F2 should use a secure connection.

This page also allows the user to turn notifications on/off and to synchronise contacts with F2 Touch.

Once the settings have been reviewed, tap **the arrow** in the upper left corner to save any changes and return to the login page.

## Log in using fingerprint on Android



**Figure 15: Activate Fingerprint Login**

It is possible to log in using the fingerprint login function on Android devices that support this feature.

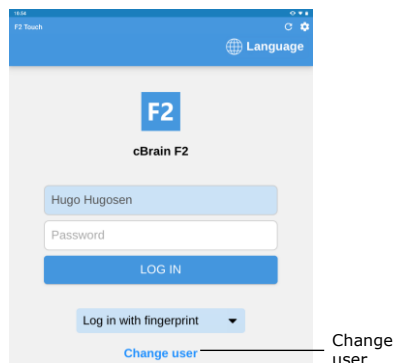
Enter username and password and tap **Log in**. A new dialogue in F2 Touch appears, asking the user to "Touch sensor". This is displayed in the figure to the left.

Now scan the finger to activate the fingerprint login function.

Once the fingerprint login is activated, the user simply scans their finger to log in to F2 Touch.

**Note:** The fingerprint login function can only be activated after logging in using a password.

Unsuccessful fingerprint login attempts are handled by the individual device's operating system. Tap **Cancel** to return to the login screen.



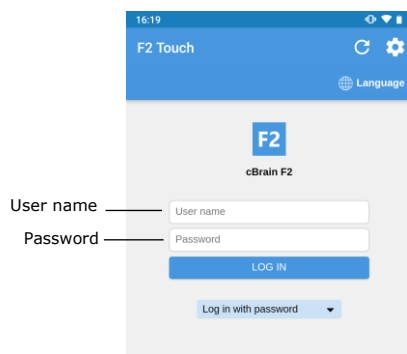
**Figure 16: Change user**

After cancelling a login and returning to the login screen, it is possible to "Change user" as shown on the figure to the left.

Tap **Change user** and enter the new login details. Then tap **Log in**.

If it is not possible to log in using the fingerprint login option or if the user does not want to log in this way, it is possible to choose to log in the same way as in F2 Desktop.

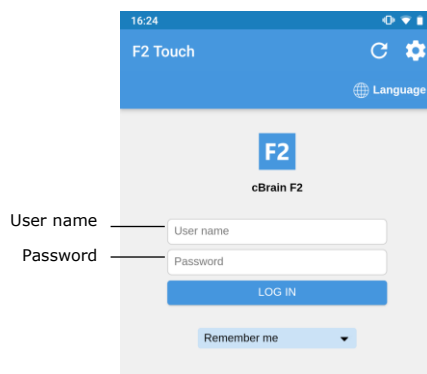
## Log in using password



**Figure 17: Log in using password**

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

## Log in using "Remember me"



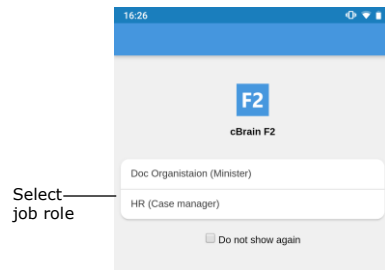
**Figure 18: Log in using "Remember me"**

When using the login method "Remember me", the user does not need to enter their login credentials every time they log in to F2 Touch.

Enter the same username and password as in F2 Desktop. Then tap **Log in**.

**Note:** The login page remembers the latest user, unless the user manually logs out of F2 Touch.

## The log in role selector

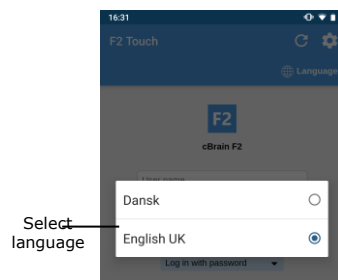


**Figure 19: Select job role on Android**

If a user has multiple roles in F2, it is possible to choose between them after entering the login information. See the figure on the left.

In the setup it is possible to choose a default login role.

## Select language





**Figure 20: Select language on Android**

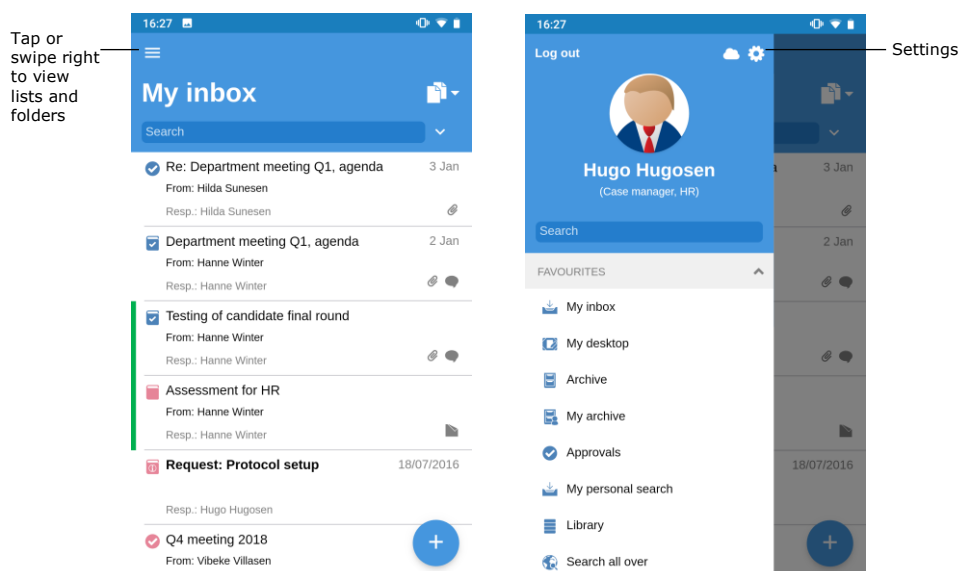
The user can select the language for F2 Touch on the login page.

Tap **Language** and select the wanted language in the dialogue. This is only possible if the F2 installation supports more than one language.

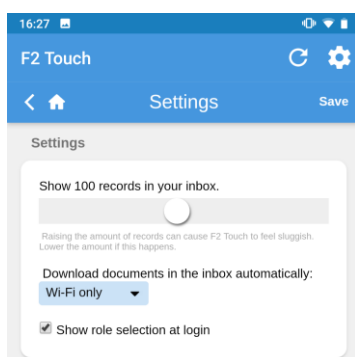
**Note:** F2 Touch always displays the language that was selected at the initial login.

## Personal settings for Android


Once logged in, it is possible to customise the personal settings in F2 Touch. To see an overview of the lists and folders either swipe right on a list or tap the  icon in the upper left corner. Then tap **Settings**  in the upper right corner.



**Figure 21: Open settings on Android**



**Figure 22: Customise settings on Android**

Tap **Settings**  to open the page as shown to the left.

Here it is possible to change the number of items shown in the inbox and to enable/disable the role selector on login.

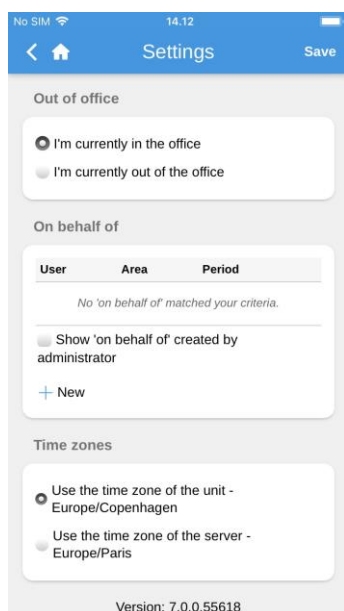
It is also possible to choose when to download documents in the inbox. There are three options:

- Always. Documents are downloaded whenever there is an Internet connection.
- Wi-Fi only. Documents are downloaded when the device has a Wi-Fi connection.
- Never. Documents are not downloaded.

## Managing personal settings

The following sections describe how to manage the personal settings in F2 Touch and apply to both iOS and Android devices.





**Figure 23: Managing personal settings**

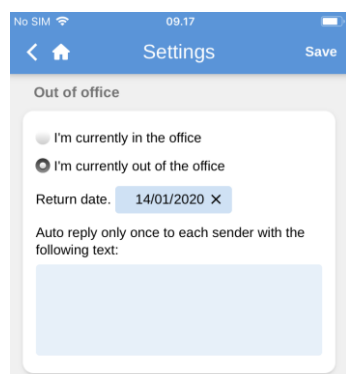
In F2 Touch, a user can grant “on behalf of” rights to another user and set him/herself as “Out of office”.

Swipe right and tap **Settings**  to manage personal settings.

The following section describes how to manage personal settings in F2 Touch.

## “Out of office”

As with F2 Desktop, it is possible to edit and set up an “Out of office” message in F2 Touch. The procedure is the same as in F2 Desktop.



**Figure 24: Setting up “Out of office”**

Tap **I’m currently out of office** and specify:

- Return date. A date is selected using the calendar which is opened by tapping the date field.
- The automatic reply that is sent to those who contact the user during the absence. This applies both internally and externally.

When the information is entered, tap **Save**.

## "On behalf of" rights

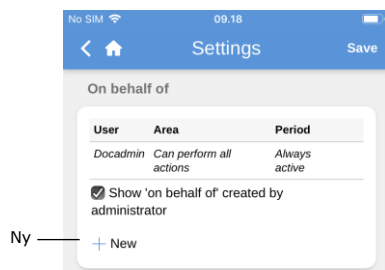


Figure 25: New "On behalf of"

A user can assign "on behalf of" rights to another user in F2 Touch by tapping **New** in the "On behalf of" field.

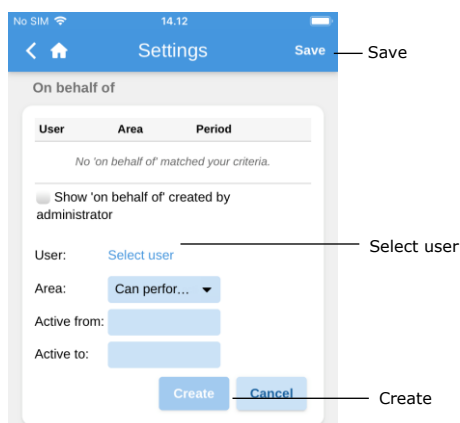


Figure 26: Setting up "On behalf of"

It is then possible to specify:

- Which user the privilege is given to.
- If the user who has been given the privilege must be able to perform all actions on behalf of the original user or only handle approvals (if the add-on module F2 Approvals has been purchased).
- From when the "on behalf of" rights are active.
- When the "on behalf of" rights expire.

Tap **Create** to complete.

Remember to tap **Save** to keep the changes.

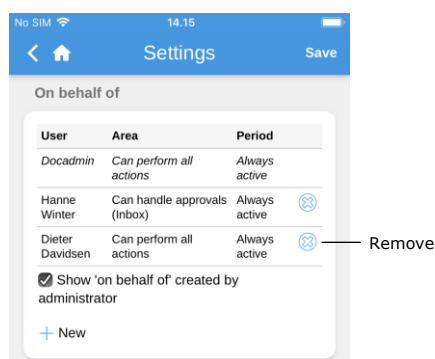


Figure 27: Remove "On behalf of"

"On behalf of" rights are removed from a user by tapping the **X** next to the specific user.

Tick the "Show 'on behalf of' created by administrator" box to display any users with "on behalf of" rights created by a user with the "On behalf of administrator" privilege.

By default, only the users with "on behalf of" rights created by the user him/herself are displayed.

## Select time zone

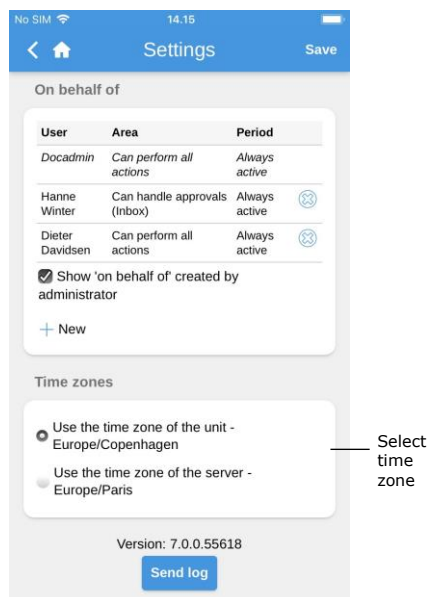


Figure 28: Select time zone

It is possible to base F2 Touch's time and date on either the unit's time zone or the server's time zone. By default, F2 Touch uses the former. If the configuration is available, select the desired time zone in "Settings".

The time zone is used e.g. for deadlines. If the user has chosen the unit's time zone, deadlines will be shown in his/her native time zone when abroad. This also applies when a time and date is set for e.g. deadlines or searches. F2 users in a different time zone will see the date and time in their local time. If the time and date is generated on the server, it will always be displayed in the server's time zone.

This configuration is set up in cooperation with cBrain.

## Send log manually

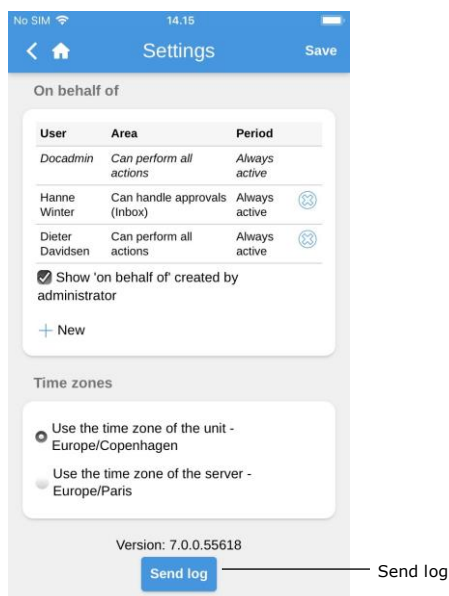
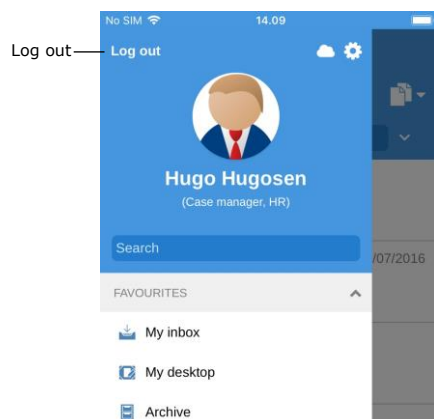


Figure 29: "Send log" in "Settings"

At the bottom of the "Settings" page it is possible to send logs manually.

Tap the **Send log** button to send a log to cBrain. This option can be used if an user experiences any errors in F2 Touch.

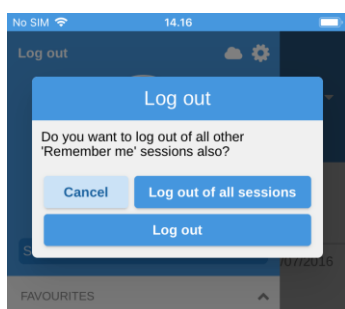
## Log out and “Remember me”



**Figure 30: Log out of F2 Touch**

To log out of F2 Touch, swipe right and tap **Log out**.

Depending on the configuration of F2 Touch, “Remember me” can be disabled by selecting **Log out** on all units for which this function has been active.



**Figure 31: The “Log out” dialogue**

By tapping **Log out**, a dialog appears as displayed to the left. In this dialogue there are three options:

- **Log out:** The user is logged out of F2 Touch, but F2 Touch will remember the selection and keep the tick in the “Remember me” box.
- **Log out of all sessions:** F2 Touch removes the tick in the “Remember me” box
- **Cancel:** Cancels the action and returns the user to the list view.

# Lists and folders


F2 Touch contains the majority of all the lists and folders that a user has access to in F2 Desktop, such as "My desktop", "My archive", favourite and personal searches. The "Latest documents" list is not displayed.

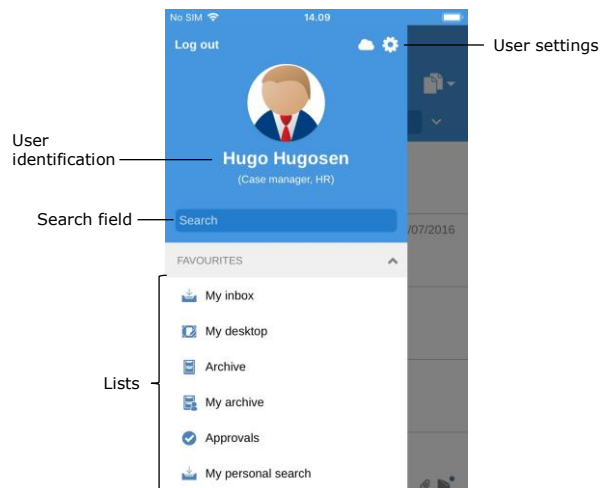
## Show lists and folders

Swipe right from the inbox or a list to see an overview of the lists and folders. Swipe left to hide the overview again.

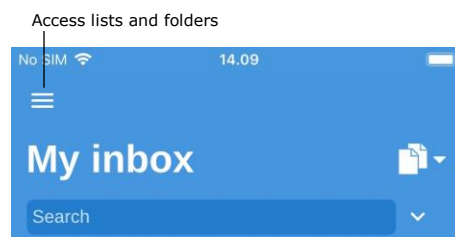
The user identification is displayed at the top of the overview. Here the user settings can also be accessed.

The displayed lists can be sorted. To sort through a list, enter a word in the search field. F2 Touch will then automatically show the lists that contain the search word. This provides a quick overview in a large number of lists.

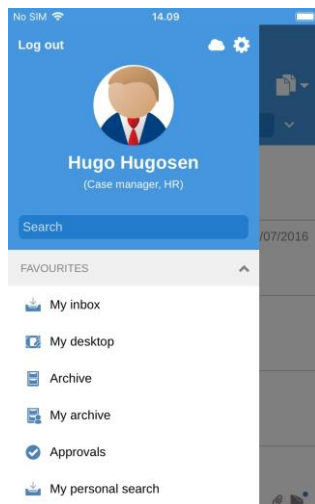
Lists and folders can also be accessed by tapping the  icon in the upper left corner.



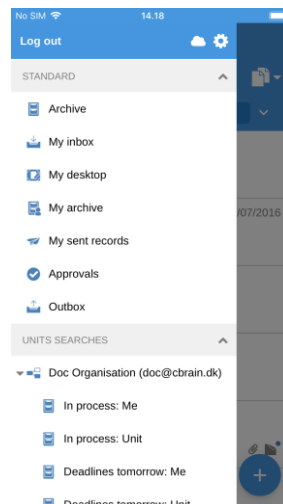
**Figure 32: The overview of lists and folders**



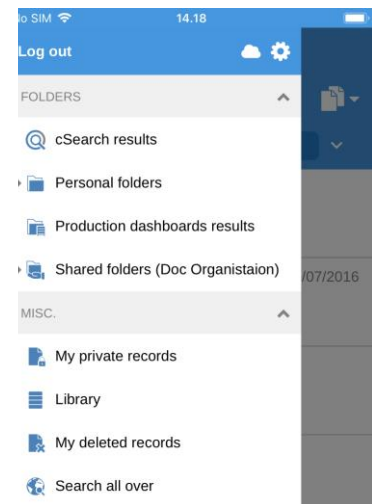
**Figure 33: Access lists and folders**



**Figure 34: Favourites**



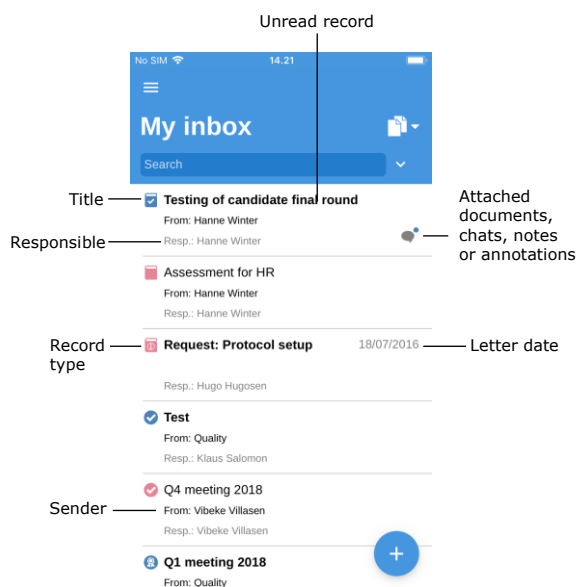
**Figure 35: Lists and unit searches**



**Figure 36: Folders and misc.**

## My inbox

When F2 Touch is opened, "My inbox" is displayed as shown below.



**Figure 37: My inbox**

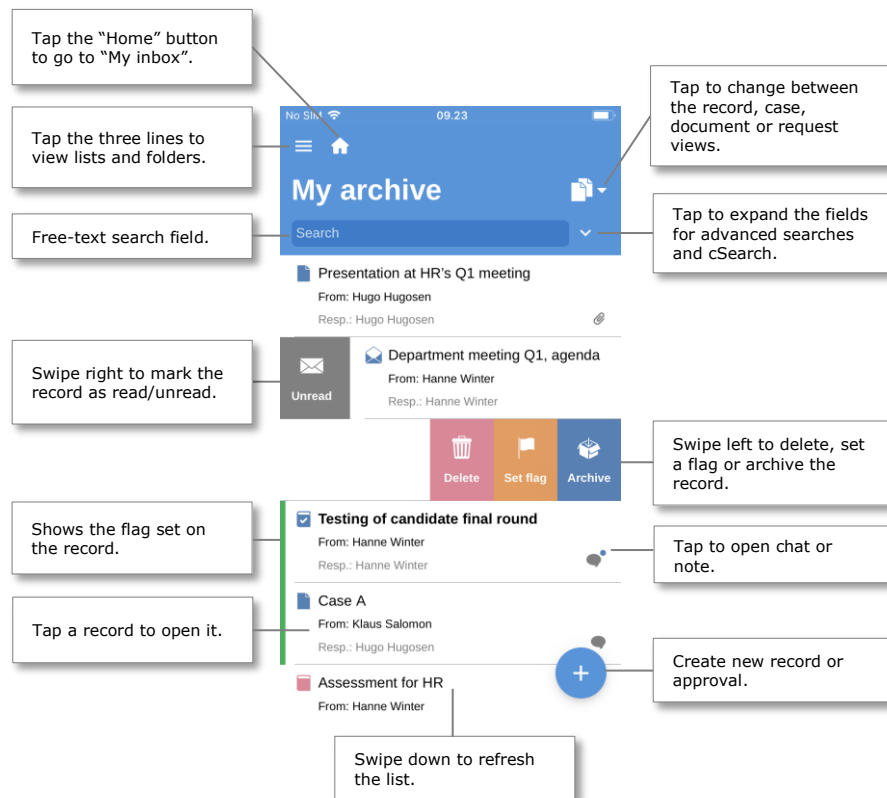
The following is displayed for every record:

- Title.
- The name of the user responsible for the record.
- Record type (can be identified by the icon).
- Sender, if the record has been sent.
- Attached documents, chats, notes and/or annotations.
- Letter date, if the record has been sent.

Unread records are shown in bold.

## Navigating the result lists

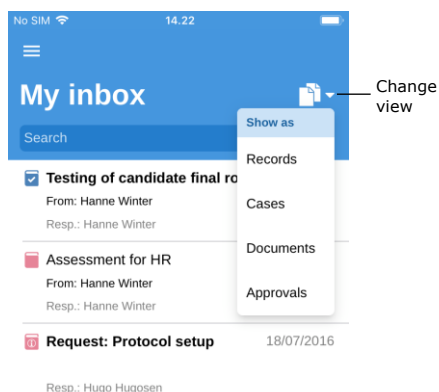
When F2 Touch is opened, there are a number of options for navigation, archiving, etc., in the result list. These options apply to all lists in F2 Touch.




**Figure 38: Navigation options for lists**

## The record, case, document and approval views in the result list

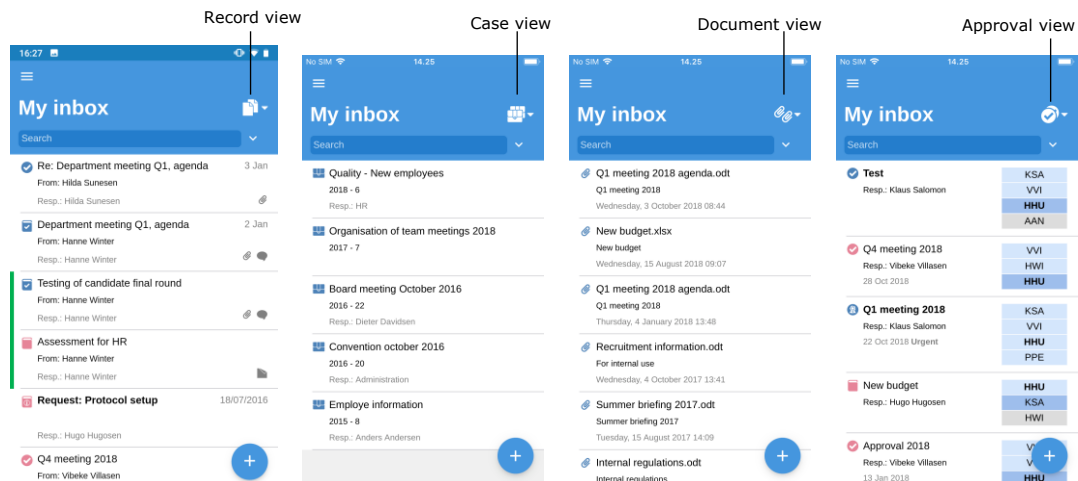
By default, the inbox appears as a list of records. The inbox can also be displayed as a list of cases, documents or approvals. This will display the cases in which records in the inbox are included, the documents attached to the records, or the approvals in which the user is involved, respectively.



**Figure 39: Change list view**

Tap the **View mode**  to switch between the different list views: record (default view), case, document and approval list view.

The list view determines the parameters by which items are sorted. Each set of parameters are a default for the given F2 installation.



**Figure 40: The four viewing options in the result list**

## Limitation to the number of unread records

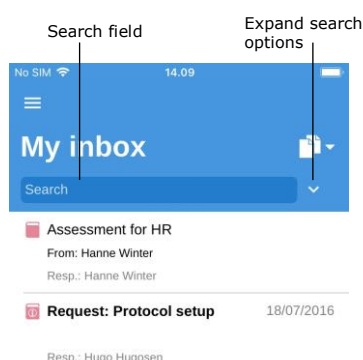
F2 Touch displays no higher number than 99 unread records. If there are more than 99 unread records, the number remains at 99. This is identical to the behaviour of F2 Desktop.



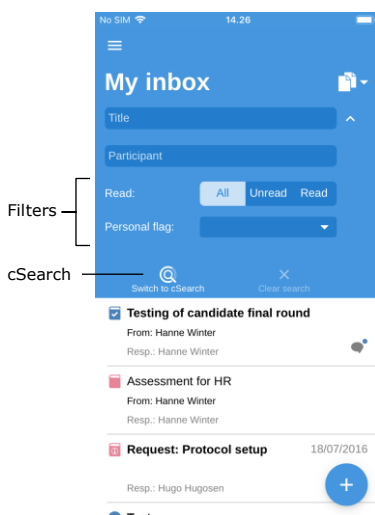
# Searches

The following section describes the search functions in F2 Touch. Searches are performed the same way in F2 Touch as in F2 Desktop.

Read more about performing searches in the user manual *F2 Desktop – Searches*.




**Figure 41: Search in a list**



**Figure 42: Expand search options**

The user can search through a list by using the search field located above the list.

The user can search for record and case titles in the search field. F2 Touch then finds the records whose title or the title of their attached case contain the search word.

Tap  to view other search options as well as sorting options.

This allows the user to search for:

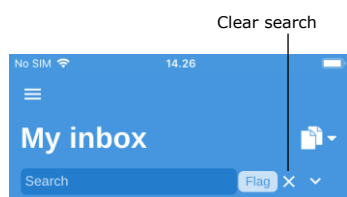
- **Title** or parts of words that appear in the record or case title.
- **Participant**, i.e. records containing certain participants or units from the participant register.

The list can be sorted using the following filters:

- **All/Unread/Read**
- **Personal flag**, which searches after records with the chosen flag.

F2 cSearch (add-on module) can be used to perform searches by tapping **cSearch**.

Read more about cSearch in the section *F2 cSearch*.



**Figure 43: Search criteria**

If the expanded search options are hidden, but one or more of them has been used in the search, any used search criteria are displayed next to the search field.

Clear the search by tapping **X**.

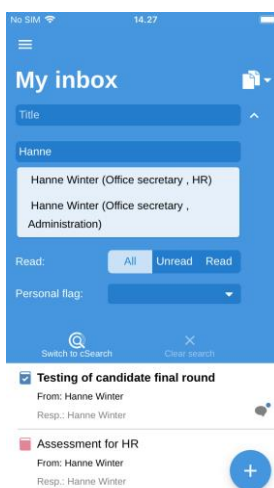
## Sorting the search results

When records are searched for, they are sorted in chronological order so that the most recently updated record is at the top of the result list.

In the lists "My Archive", "My desktop", and "My inbox" along with "Inbox (Unit)", "Archive (Unit)" and "Desktop (Unit)", all actions related to a record affect its placement in the results list. For example, changes to visible chats on a record are considered updates, thus affecting the placement of the record in the results list.

## Record search for a participant (user)

In F2 Touch it is possible to search for a specific participant from F2's participant register. When searching for a particular participant, all records with the participant as the responsible user, the sender or the receiver are found.



**Figure 44: Search for a participant**

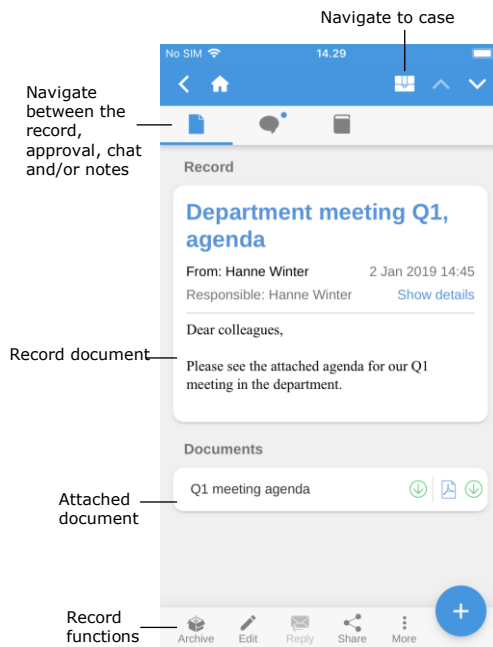
In F2 Touch it is possible to search for records with deactivated participants.

If the name of a deactivated participant is entered, it will be displayed in italics and greyed out.

# Working with records in F2 Touch

The following section describes the different views and functions for records in F2 Touch.

## Show record



**Figure 45: The record view**

Tap a record to open and work on the record document and any attached documents, chats, notes, etc.

If the record is attached to a case, the user can navigate to the case by tapping the case icon in the blue ribbon.

The user can navigate between the record document, chats and notes on the record using the menu items in the grey ribbon below the blue one. If the record contains an approval or a request, these are also displayed here.

The grey ribbon at the bottom contains a number of functions for working with the record.






## Functions on the record


At the bottom of the record view, there are a number of functions for working with the record.



**Figure 46: Functions in the record view**

The access rights for the record determine which functions are available for the user. The functions are described in the table below:

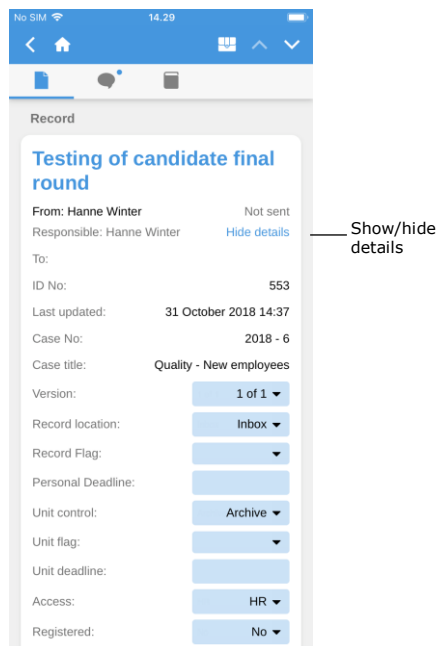
Icon	Menu item	Function
	Archive	Archives the record.
	Edit	Opens a sub-menu with the following options: <ul style="list-style-type: none"> <li>Edit record</li> <li>Edit approval document (add-on module)</li> <li>Edit approval (add-on module)</li> <li>Change responsible</li> <li>Set supplementary</li> <li>Set keywords.</li> </ul>
	Reply	Opens a sub-menu with the following options: <ul style="list-style-type: none"> <li>Reply</li> <li>Reply all</li> <li>Forward.</li> </ul>
	Share	Opens a sub-menu with the following options: <ul style="list-style-type: none"> <li>Copy link to this record</li> <li>Record document as PDF</li> <li>Approval document as PDF (add-on module)</li> <li>Generate combined PDF.</li> </ul>
	More	Opens a sub-menu with the following options: <ul style="list-style-type: none"> <li>Mark as unread</li> <li>Delete record.</li> </ul>

Tap  in order to perform the following actions on the record:

- New chat
- Chat all
- New note
- New approval (add-on module)
- New request
- New annotation

**Note:** Menu items relating to approvals require the add-on module F2 Approvals. The new approval menu item is only visible if the user has the necessary rights to create an approval on the record.

## Show/hide details in the record view



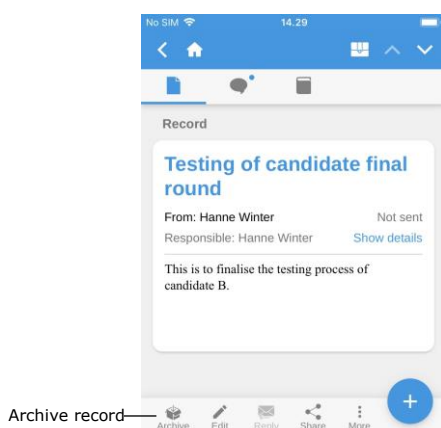
**Figure 47: Show/hide details for the record's metadata**

Tap **Show details** to view and edit the following metadata:

- Responsible
- Letter date
- To/From
- Record ID
- Last updated
- Version (see the note below)
- Record location
- Record flag
- Personal deadline
- Unit control
- Unit flag
- Unit deadline
- Access
- Registered.


**Note:** It is not possible to make changes to older versions of the record as in F2 Desktop.

## Archive record

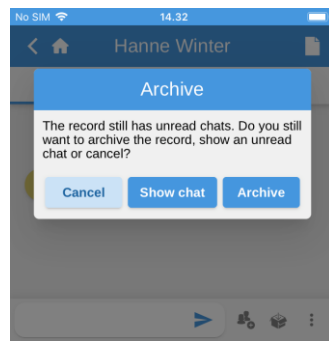


**Figure 48: Archive record**

In F2 Touch it is possible to archive a record directly from the record.

Tap **Archive**  in the bottom left corner of the record to archive it as shown in the figure.

When the record has been archived the next record in the list is displayed.

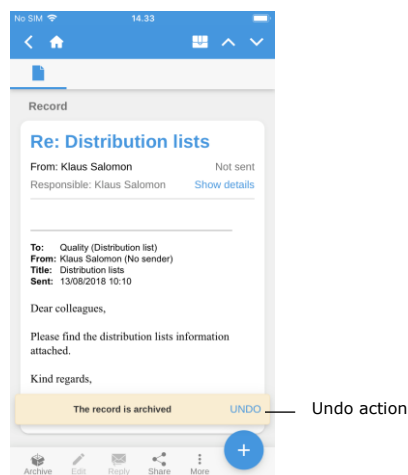


**Figure 49: Archiving a record with unread chats**

Tapping **Archive**  on a record with unread chats will display the "Archive" dialogue.

In the dialogue F2 Touch asks the user to choose between the following: to archive the record despite its unread chats, to show the chats or to cancel the action. The figure to the left illustrates the dialogue.

## Undo action



**Figure 50: Undo "Archive record" action**

In F2 Touch it is possible to undo certain actions on a record. An "Undo" button appears at the bottom of the screen when the following actions are performed:

- Archive record.
- Delete record.
- Send record. Tapping "Undo" will stop the record from being sent, but any changes to the record will be saved.

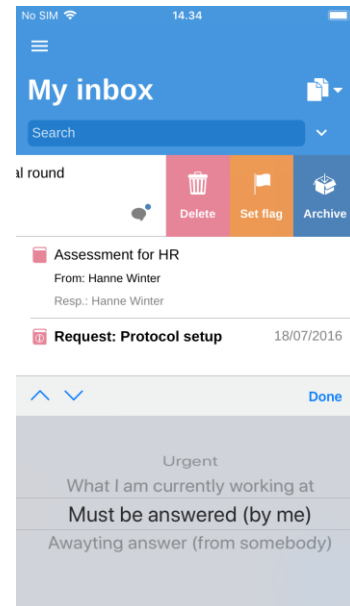
**Note:** The "Undo" button is only available for a few seconds.

## Allocate a flag by swiping

It is possible to allocate a flag to a record directly from the result list using a swipe action. Swipe left and the options **Delete**, **Set flag** and **Archive** will appear.

Choosing **Set flag** will display the available flags at the bottom of the screen as shown in the figure to the right.

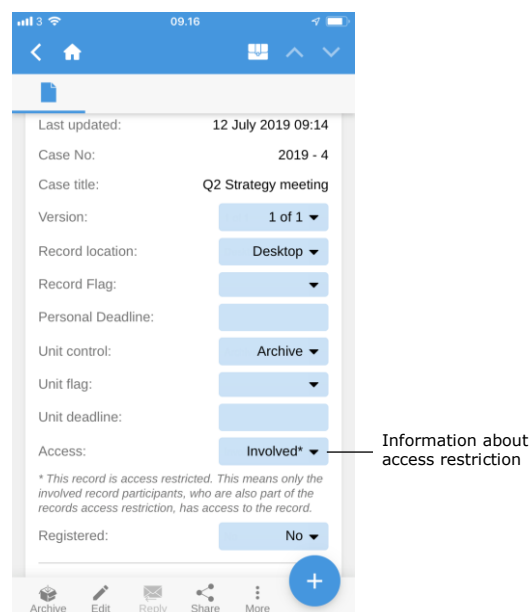
Personal flags can be set on personal lists, while unit flags can be set on unit lists.



**Figure 51: Allocate a flag directly from the result list**

## Include participant in access restriction

If a record is given restricted access through the fields "Access restricted to" or "Case access restricted to", an asterisk "\*" appears in the "Access" field on the record.



**Figure 52: Information about access restriction**

Internal participants can be given access to records that are access restricted.

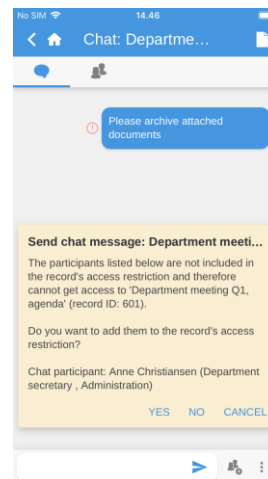
It is possible to give a participant access to a record with an access restriction when performing the following actions:

- Send a chat
- Add chat participant
- Save a record
- Attach record to a case
- Send a record
- Approve an approval.

If a user attempts to share a record with an internal participant who does not have access to the record, F2 asks if the participant should be included in the record's access restriction.


In this dialogue it is possible to add participants to the access restriction. If the participant is not added, they will not be able to see the record or the chat.

For more information about access restriction in connection with records and cases, please see the user manual *F2 Desktop – Records and Communication*.



**Figure 53: Include participant in the access restriction**

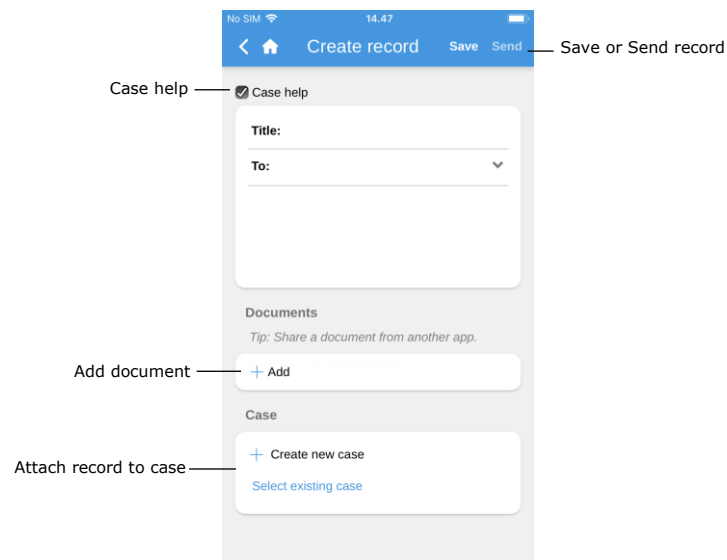
## Create record

Records can be created from every list in F2 Touch. To create a new record, tap the  icon in the bottom right corner. Here the user can give the new record a title and attach it to an existing case or create a new case.

To send the record as an email, enter the recipient in the "To" field. Read more about sending emails from F2 Touch in the section *Send record as email*.

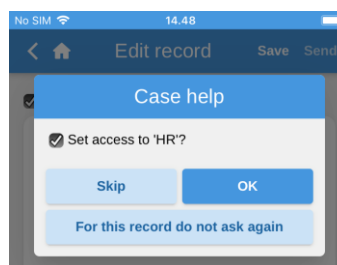
Attachments can be added to the record in the "Add" field in the "Documents" section. Read more about adding attachments in the section *Add document in F2 Touch*.





**Figure 54: Create record**

Tap **Save** or **Send** to save or send the record. If the "Case help" field is ticked the user must consider the case help dialogue before the record is saved or sent.

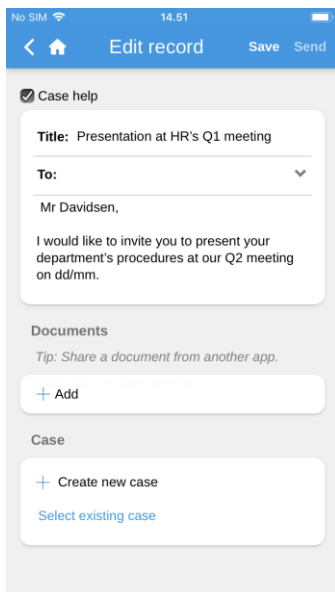


**Figure 55: Case help**

In F2 Touch, the case help functions and appears similar to the case help in F2 Desktop.

Read more about this function in the user manual *F2 Desktop – Records and communication*.

## Edit record



**Figure 56: Edit record**

Existing records can be edited depending on the individual user's privileges.

Put a record in editing mode by tapping **Edit** and then **Edit record**.

When the record is in editing mode it is possible to edit the title, the record document, recipients (emails), attached documents and associated cases.

When editing the record, it is also possible to edit its attached documents and to add or delete attachments. This will be described in the following sections.

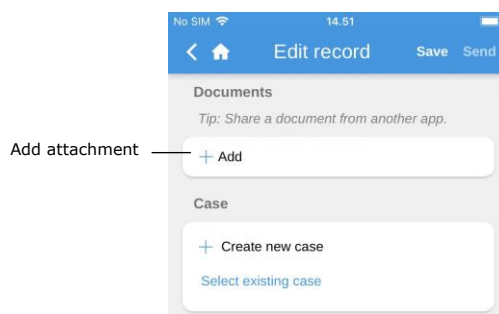
Furthermore, a document can be attached via other apps opened through F2 Touch. The document will be attached to the current record.

## Add document in F2 Touch

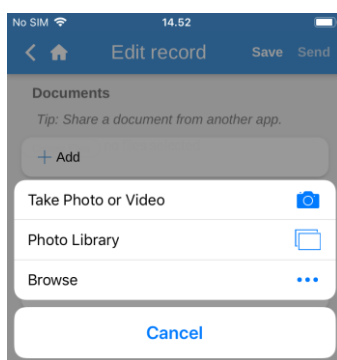
In F2 Touch it is possible to upload an attachment of up to 40 MB. This may be a document or image from the mobile device's file system.

**Device:** iPhone, iPad or web browser.

Tap **Edit record** in the bottom grey ribbon to set the record in editing mode.



**Figure 57: Add document - Step 1**



**Figure 58: The file selector on an iPhone**

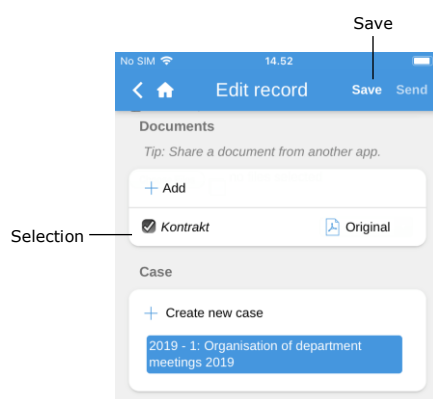
Tap **Add** in the “Documents” menu item to open the device’s standard file selector.

The following options are given when using an iOS device:

- Take a photo or record video.
- Transfer one or more photos from the image library.
- Transfer a file from another app using the “Browse” feature. From here, the user can search all documents saved on the device.

Select a file from the device’s system.

**Note:** On an iPad, one or more files can be dragged and dropped from another app onto the “Add” button by using the Split View function.



**Figure 59: Add document – Step 2**

To cancel the attachment process, simply deselect the file before tapping **Save**.

Tap **Save** to attach the chosen file to the record.

## Edit document

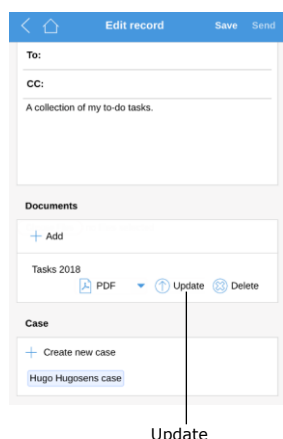
In F2 Touch there are two ways to edit a document that is attached to a record:

- Select an existing file in the device’s file system to overwrite an existing document on the record (only applicable when accessing F2 Touch from a web browser).
- Open the document in another editing app to edit, and then re-import it document to F2 Touch.

The two methods are described in the following sections.


## Edit document by overwriting it with an existing file

**Device:** Web browser.

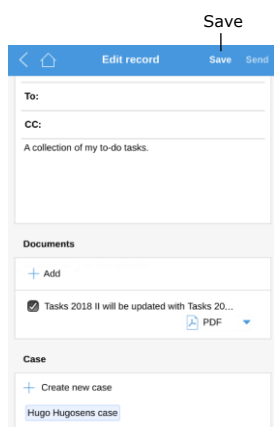


**Figure 60: Edit document – Step 1**

Tap **Edit record** in the bottom grey ribbon to enter editing mode.

Overwrite an attached document by tapping **Update**  in the "Documents" menu item.

This will open the unit's file system from which the user can find and select the desired file.



**Figure 61: Edit document – Step 2**

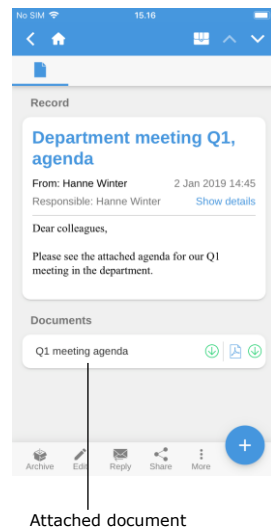
Once the file has been selected, tap **Save** to save it on the record. The new file will replace the existing attachment.

To cancel the replacement, deselect the file before tapping **Save**.

## Edit document using an external app

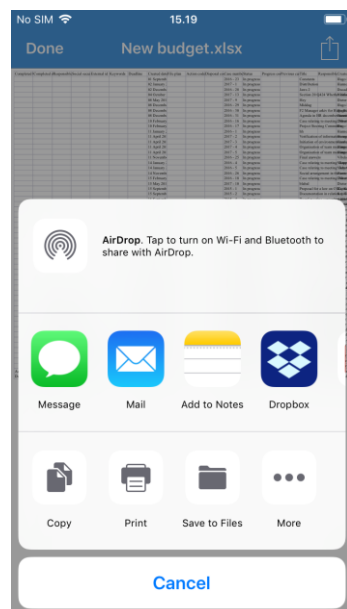
**Device:** iPhone, iPad or Android phones/tablets.

An attached document can be edited by exporting it to an external editing app and then reimporting to F2 Touch.





Open the attachment in F2 Touch by tapping on the document's title. The record must be in read-only mode.

**Figure 62: Edit document using an external app – Step 1**



With the document open in F2 Touch, tap **Document interaction** to open the it in an external editing app:

- On an Apple iOS device tap .
- On an Android device tap .

**Figure 63: Edit document using an external app – Step 2**

Edit the document in the selected app. When the editing is done, the document must be saved and sent back to F2 Touch. This is done in the following way:

The screenshot shows the 'Edit record' interface. At the top, there's a blue header with a back arrow, a home icon, and the title 'Edit record', along with 'Save' and 'Send' buttons. Below the header, there's a 'Case help' section with a checked checkbox. The main form has fields for 'Title: Tasks', 'To:', 'CC:', and a description 'A collection of my to-do tasks.'. Below this is a 'Documents' section with an '+ Add' button and a list of documents. One document, 'Tasks 2018', is shown with a PDF icon and options to 'Update' or 'Delete'. At the bottom is a 'Case' section with a '+ Create new case' button and a list of cases, including 'Hugo Hugosens case'.



Open F2 Touch. Select the record to which the document will be attached. Tap **Edit record** on the grey ribbon at the bottom of the record to enter editing mode.

**Figure 64: Edit document using an external app – Step 3**

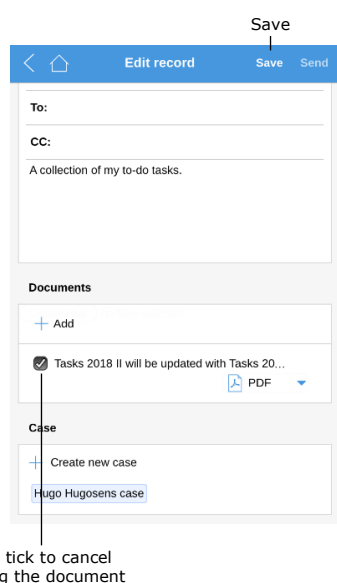


**Figure 65: Edit attachment using an external app – Step 4**

Open the external app used to edit the document. Tap **Document interaction** in the app:

- On an Apple iOS device tap .
- On an Android device tap .

Select **Copy to F2 Touch** and the document is sent back to F2 Touch.



**Figure 66: Edit attachment using an external app – Step 5**

The document is added as a new attachment. It is not possible to keep both versions of the document, but it is possible to cancel the action by removing the tick in the box next to the document's title.

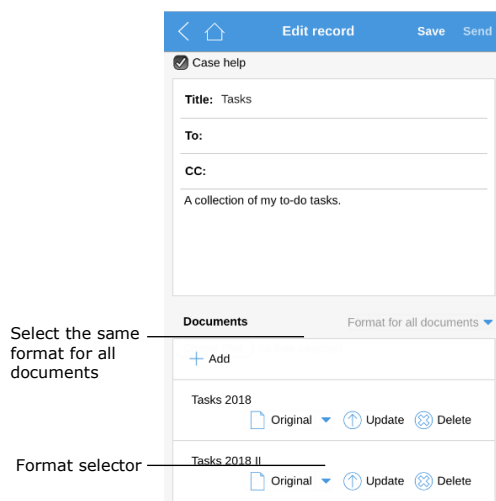
Tap **Save** to complete.

The document is then updated.

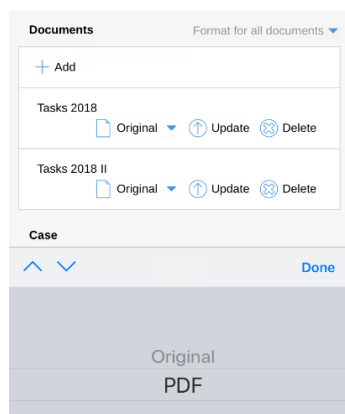
**Note:** Documents attached to a record in F2 are displayed without an F2 ID when opened in F2 Touch in a PC browser. The document's title is displayed instead. In the F2 Touch app, attached documents are displayed with both title and F2 ID, making it possible on a mobile device to open an attached document from F2 in another app and save it to the same record in F2 again.

## Selecting the format of documents

It is possible to select the format of a document that is attached to a record. Selecting a document format applies only when records are sent as external emails. For records that are shared internally in an F2 authority (including internal emails), the document retains its original format.



**Figure 67: Format selector**



**Figure 68: Select the format**

Set the record in editing mode. The document format can be selected next to the attached documents under "Documents". It is both possible to choose the format for all documents attached to the record or for each document.

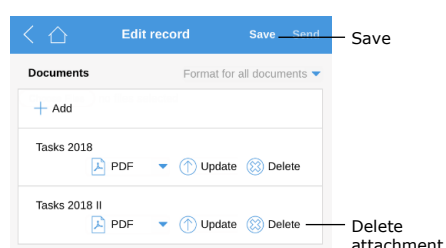
Select one of the two options to display a drop-down menu at the bottom of the screen. Here it is possible to select the wanted format. See the figure below.

It is possible to choose between the following formats:

- PDF
- Original
- PDF cleaned (only available with the add-on module F2 Metadata Remover)
- Original cleaned (only available with the add-on module F2 Metadata Remover).

The F2 Touch standard format is the one the user has selected in their individual setup in F2 Desktop.

## Delete document

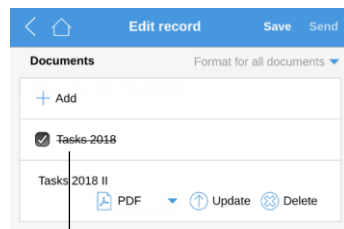


**Figure 69: Delete document – Step 1**

If an attached document must be deleted from a record, it can be done in the following way.

Enter editing mode. Tap **Delete** next to the attached document as displayed in the figure to the left. The document will then be deleted after tapping **Save**.



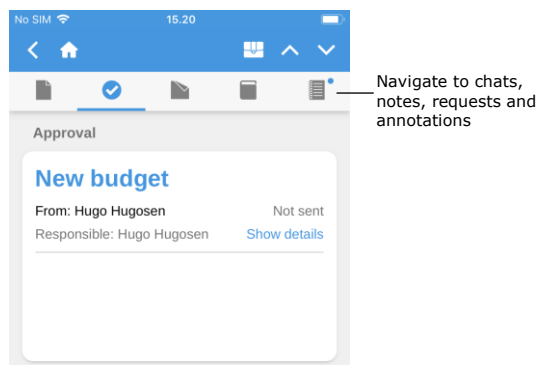


The title is crossed out

An attached document that is deleted will be crossed out as shown in the figure to the left.


**Figure 70: Delete document – Step 2**


## Communication options on the record



**Figure 71: Communicating on the record**

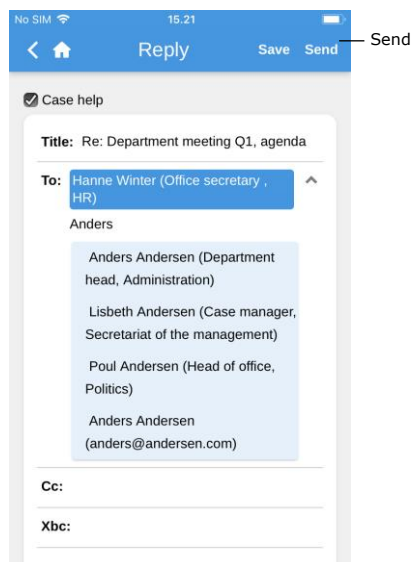
If a record has any attached chats, requests, notes and/or annotations, the communication channel's icon is displayed on the upper grey ribbon.

Tap an icon, e.g. the chat icon , to quickly navigate to the record's chats. The same applies for requests, notes and annotations.

If the icon has a little blue dot  next to it, there is an unread chat, request, notes and/or annotation on the record.

If a record contains an unread chat, note, request and/or annotation, its title is marked in bold until the record is opened. If a record contains unread chats, notes requests and/or annotations, the chat will usually be shown first. Then follows notes, requests and annotations.

## Send record as email

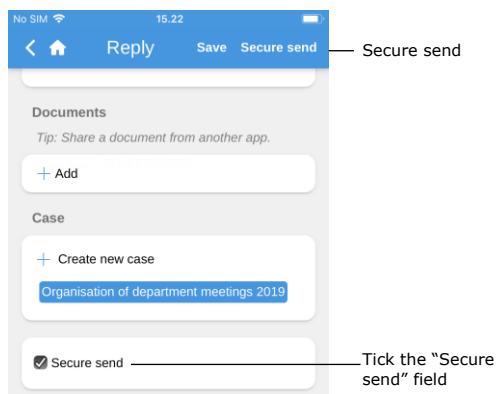


**Figure 72: Sending an email record**

Enter the recipients in the "To" field and, as in F2 Desktop, F2 Touch searches for participants that match the entered data in the participant register. The same applies to the "Cc" field.

The "Send" button appears when a participant has been entered in the "To" field.

Tap **Send** and the record is sent like an email.



**Figure 73: Secure send**

In F2 Touch it is also possible to use the function "Secure send" (add-on module).

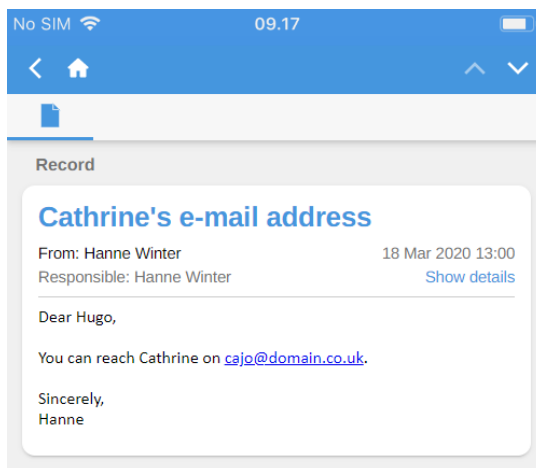
"Secure send" activates the relevant software in Microsoft Exchange that encrypts emails sent from F2.

To send securely tick the "Secure send" box at the bottom of the record. The "Secure send" box is only visible when a participant has been entered in the "To" field.

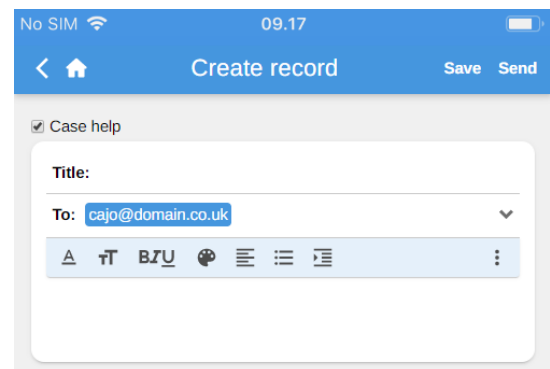
"Secure send" functions the same way in F2 Touch as in F2 Desktop. For more information please see the user manual *F2 Desktop – Records and Communication*.

## Email address links create new records

Tapping a link to an email address in a record document creates a new record. The new record has the relevant email listed as recipient in the "To" field.

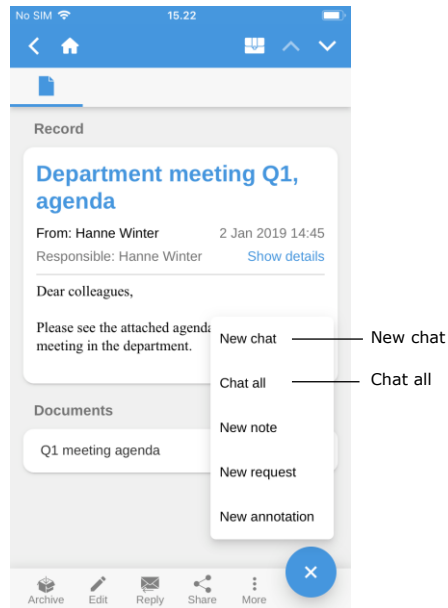


**Figure 74: An email address in the record document**




**Figure 75: A new record with the email address as recipient**

## Create chat



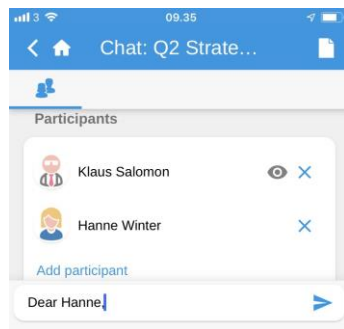
**Figure 76: Create chat**

To create a new chat, first open a record and tap **Add** . Then tap **New chat**. The "Add" button is located in the grey ribbon at the bottom.

Tapping **New chat** will open the chat window as shown below.

Tap **Chat all** and all the participants on a record are automatically set as chat participants.

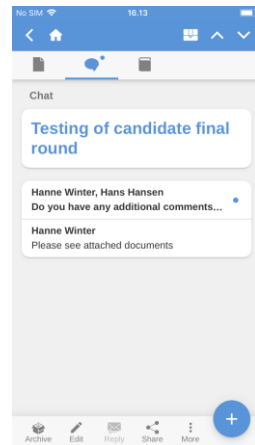
This is a quick and easy way to send a chat message to the record's involved participants.



**Figure 77: New chat conversation**

Add recipients to the "Participants" field. When a name is entered in the field, F2 Touch searches for participants who match the entered data in the participant register. This is the same procedure as when using F2 Desktop.

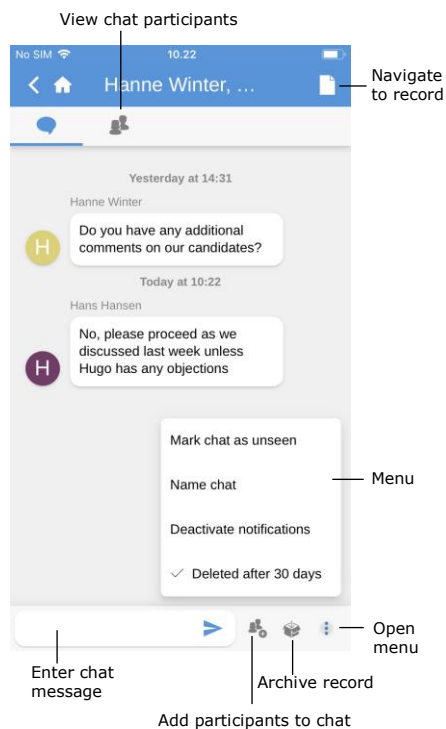
Enter the chat message in the text field below. Tap ➡ to send the chat.



**Figure 78: Chat overview**

Access the chat by navigating to the chat message overview or by using the chat icon (speech bubble) next to a record in the result lists.

If a chat is unread or new messages in the chat have appeared, the chat icon will appear as follows: (speech bubble with a blue dot).




**Figure 79: Chat window**

There are a number of functions available in the chat window.

In the top ribbon the user can navigate between viewing the chat participants and the conversation.

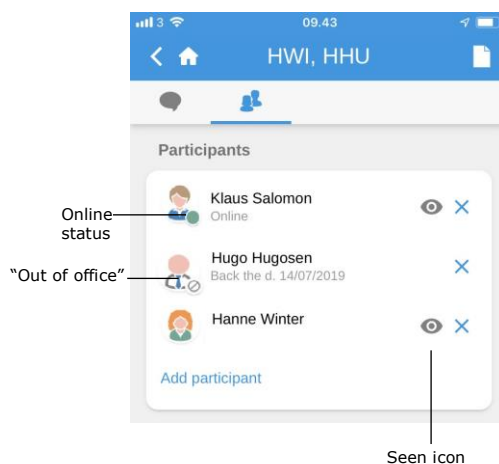
The ribbon below contains the following functions:

- Enter chat message
- Add participants to chat
- Archive record
- Menu

Tap the menu  for the following options:

- Mark chat as unseen
- Name chat/Edit chat title
- Activate/deactivate notifications
- Turn "Deleted after 30 days" on/off.

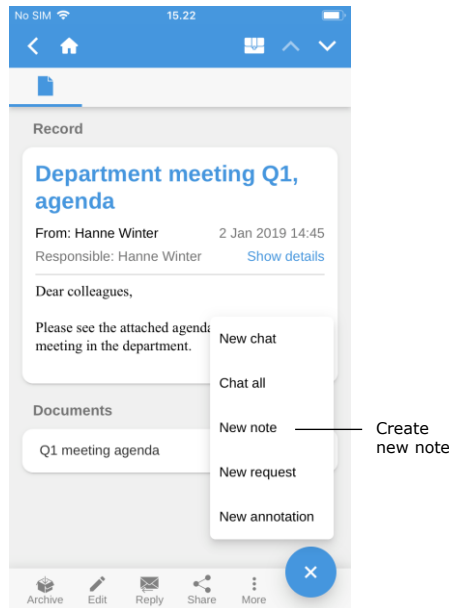
Read more about chat functions in the user manual *F2 Desktop – Records and communication*.




**Figure 80: The participant tab on chats and notes**

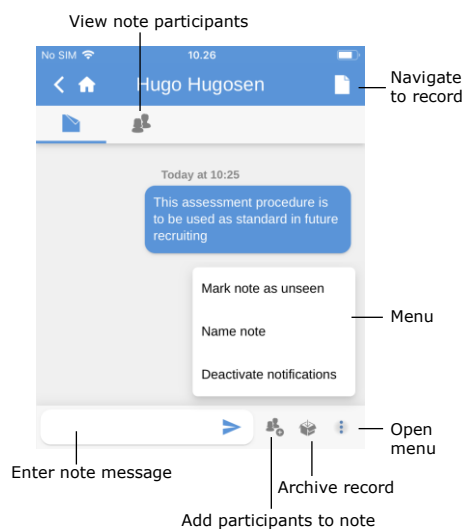
The participant tab on both chats and notes shows the participants' images, whether the chat/note has been seen and the participants' online status and "Out of office" message.

## Create note



**Figure 81: Create new note**

To create a new note, open a record, tap **Add**  and then select **New note**. The button is located in the grey ribbon at the bottom.




**Figure 82: Note**

A number of functions exist in the note view.

In the top ribbon the user can navigate between viewing the note participants and the note text.

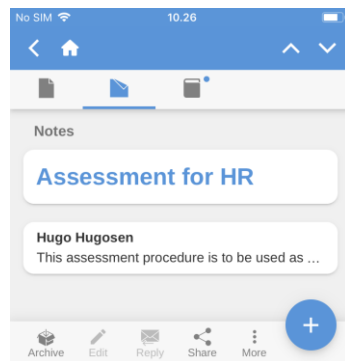
The ribbon below contains the following functions:

- Enter note text
- Add note participants
- Archive record
- Menu


Tap the menu  for the following options:


- Mark note as unseen
- Name note/Edit note title
- Activate/deactivate notifications.

Read more about notes in the user manual *F2 Desktop – Records and communication*.

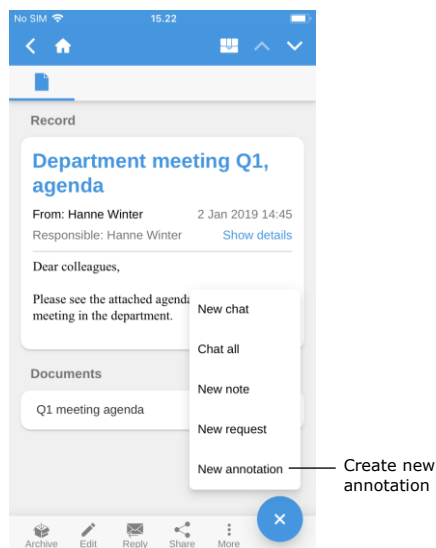


**Figure 83: Notes overview**


Access the note by navigating to the notes overview or by using the note icon  next to a record in the result lists.

If a note is unread or new messages in the note have appeared, the note icon will appear as follows: .

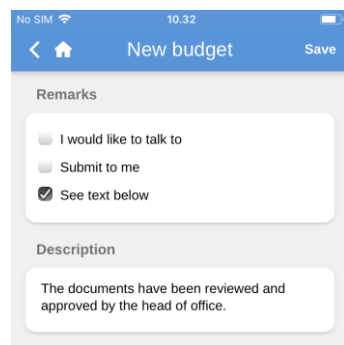
## Create annotation



**Figure 84: Create annotation**

To create a new annotation, open a record and tap **Add**  and then **New annotation**.

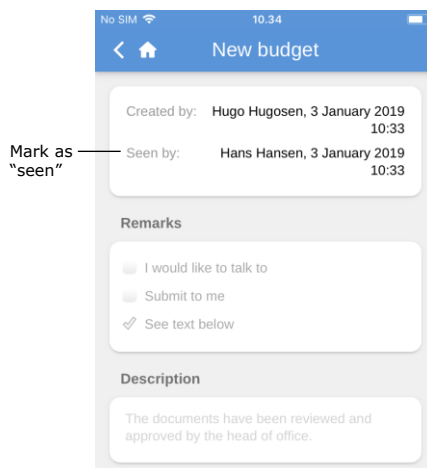




**Figure 85: New annotation**

Similar to F2 Desktop, it is possible to select an annotation type and add a description when creating an annotation.

Save the annotation by tapping **Save** in the upper right corner. It will then be visible on the record.



**Figure 86: "Seen" annotation**

On the record, annotations can be accessed in the "Annotations" field.

Here an annotation must be marked as "Seen" before a case can be completed. This functionality is the same as in F2 Desktop.

## Push notifications

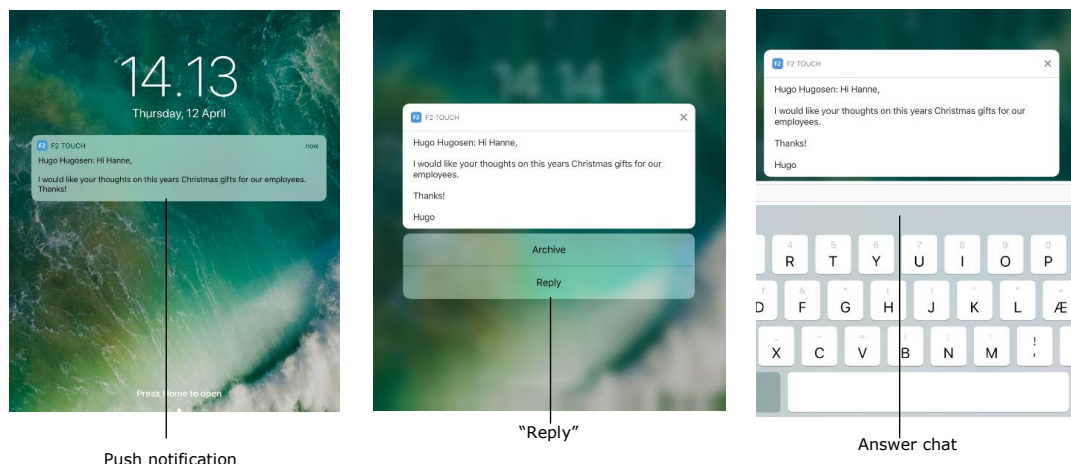
It is possible to answer a chat or archive an email or a record with a chat directly from a push notification on both iOS and Android.

When a chat push notification appears on a locked screen, it is possible to use a "3D touch" on the push notification. A 3D touch is performed by placing a finger on the notification and keeping it there for a few seconds. It is also possible to swipe right and tap on **Show**.

This opens the "Archive" and "Reply" shortcuts. An example of this can be seen in the figure below.

**Note:** The exact method of opening a push notification depends on the device's operating system.

Tap **Reply** to write an answer directly without opening F2 Touch. Tap **Send** and open the device to send the reply.

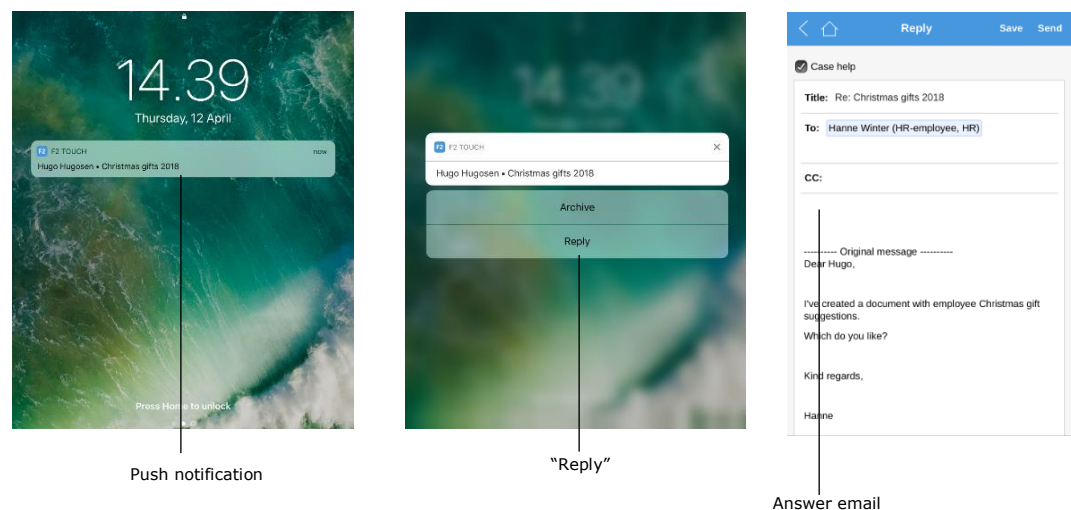


**Figure 87: Push notification – Chat**

This procedure also applies when receiving and answering an email via push notification.

The only difference is that F2 Touch will open a "Reply" dialogue when tapping **Reply** on an email, as shown in the figure below.

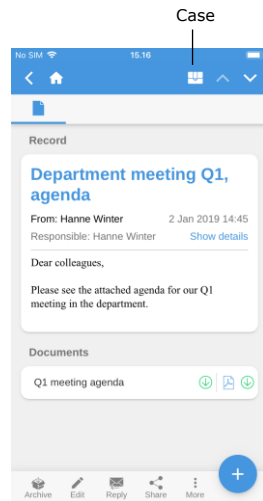
Tap **Send** to send the email reply. To archive an incoming email record or a record with a chat, tap **Archive**.




**Figure 88: Push notification – Email**

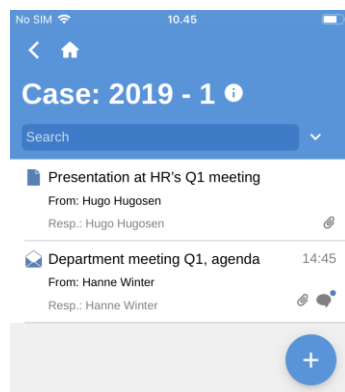
## Working with cases in F2 Touch

In F2 Touch it is possible to navigate between the different records on a case as well as adding a record to an existing case.




**Figure 89: Go to case**

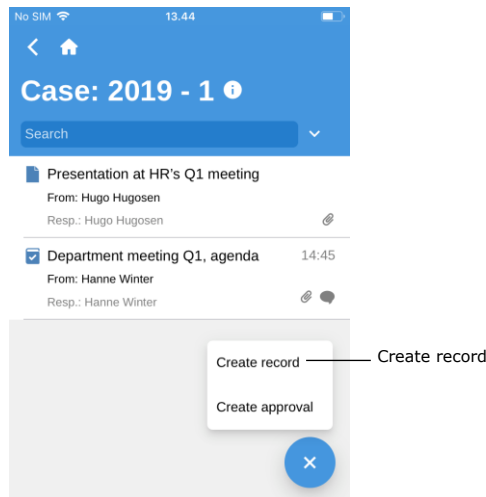
A case icon  is shown in the blue ribbon if the record is attached to a case.




**Figure 90: The case record's view**

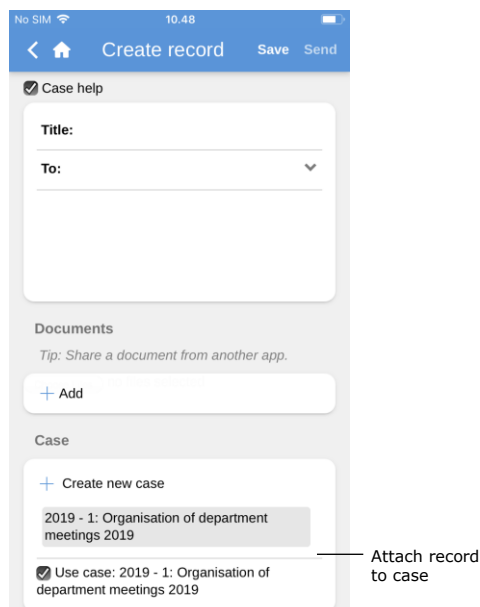
Tap **Case**  to view the case along with a list of its associated records.

## Attach a new record to a case



It is possible to create a new record and add it to an existing case using F2 Touch. To do this, open the relevant case, tap **Add** , and then tap **Create record**.

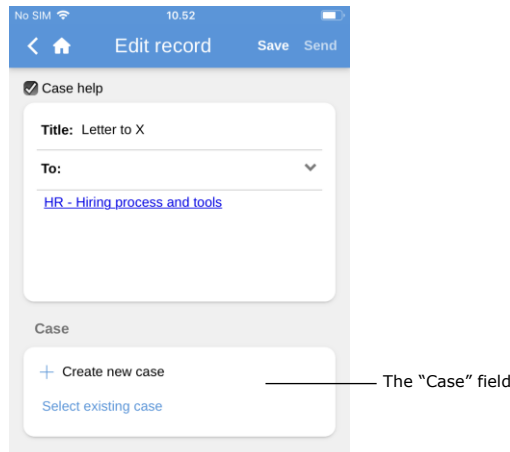
**Figure 91: Create new record on a case**



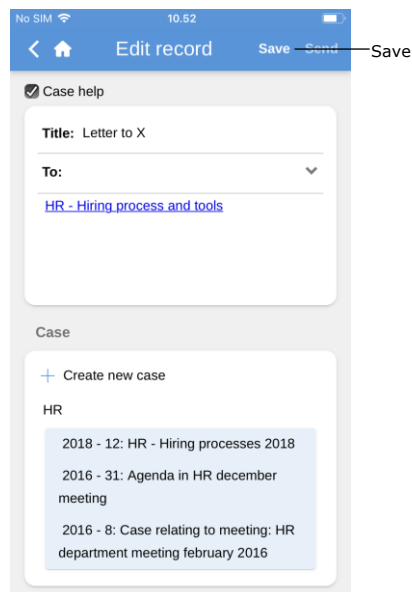
At the bottom of the newly created record is the "Use case" tick box as shown to the left. Tick **Use case**, and the newly created record will be added to the case.

**Figure 92: Attach a new record to a case**

## Attach existing record to case



**Figure 93: The "Case" field on a record**



**Figure 94: Case search result list**

An existing record can be attached to a case by opening the record and entering editing mode.

Enter edit mode on a record by tapping **Edit** and then **Edit record** in the grey ribbon at the bottom of the record.

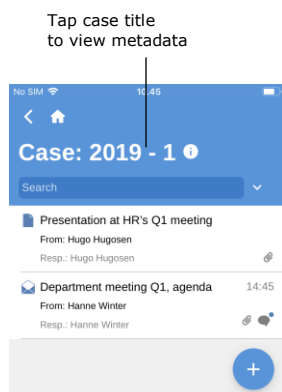
To attach the record to a case, go to the "Case" field and search for a case by tapping the field and entering a search word.

F2 Touch will then suggest cases that match the entered words, as shown in the figure below.

In the list of search results, tap on a case to select it.

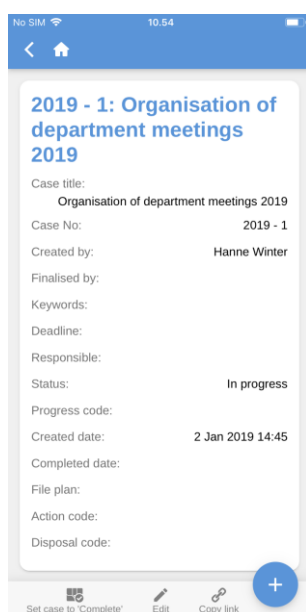
Then tap **Save** to attach the record to the selected case.

## The case metadata



**Figure 95: View the case's metadata**

A case's metadata can be accessed directly from the case. Tap the case title in the blue ribbon to view its metadata.



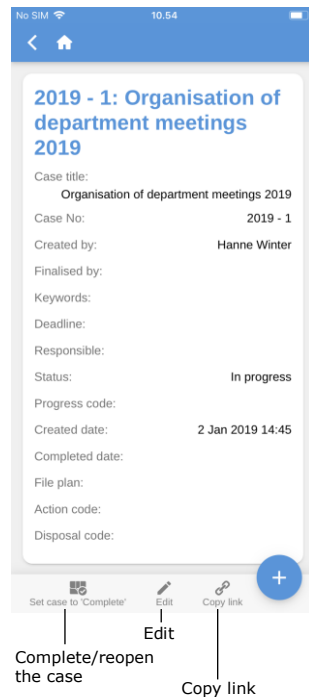
**Figure 96: View the case's metadata**

The following is displayed in the case metadata:

- Case title.
- Case number.
- Information about the creation of the case (case creator and creation date).
- Information about the completion of the case (case completer and completion date).
- The case's keywords, if one or more keywords are attached.
- The case's file plan, action code and disposal code.
- The user or unit responsible for the case.
- The case's status.
- The case's progress code.

For iPads and Android tablets, the case's metadata is displayed on the same screen as the its records.

## Edit the case metadata

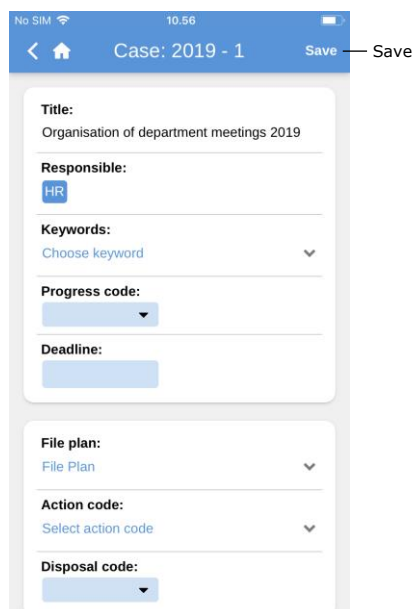


**Figure 97: The case metadata**

It is possible to edit the case metadata directly in F2 Touch.

Go to the case's metadata and tap **Edit** in the bottom grey ribbon.

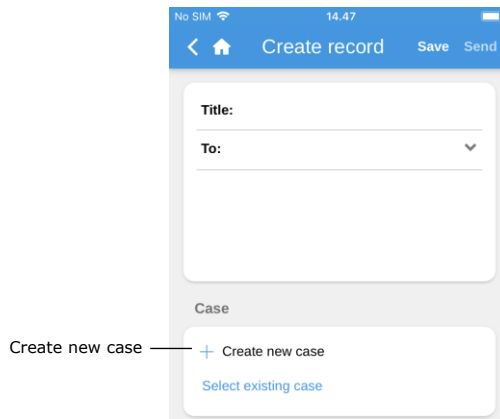
From the grey ribbon, a case can also be closed or reopened, and a link to the case can be copied. The link is copied to the unit's clipboard and can be inserted as a reference to the case either in F2 or in another programme.



**Figure 98: Editing the case metadata**

Changes to the metadata are saved by tapping **Save**.

## Create new case



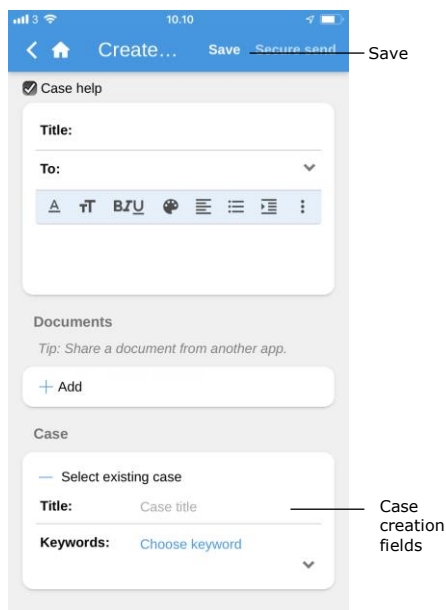
**Figure 99: The "Case" field on a record**

A new case can be created using a record. This can be done using both a newly created record or an already existing record.

Either open an existing record and enter editing mode by tapping **Edit** and then **Edit record**, or create a new record by tapping **Create record**.

In either case, scroll down to the "Case" field.

To create a new case, tap the **plus sign** in the case field. This opens a number of fields for case creation.



**Figure 100: Create a new case**

Fill in the case fields and tap **Save** to create the case.

**Note:** Some fields may be mandatory depending on F2's setup and the organisation's internal guidelines. Some fields may be already filled in. Which fields that are mandatory in the "New case" dialogue may differ. The fields for creating a new case are identical to those of F2 Desktop.



## Offline functionality in F2 Touch

Using F2 Touch it is possible to access and manage records even when offline in F2. This facilitates work in the case of Internet connectivity issues. The offline functionality is available in the F2 Touch app, but not through a web browser.

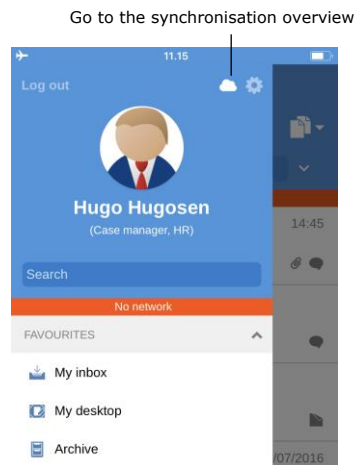
By default, F2 Touch shows the top 99 records in "My inbox" even if the user is offline. In all other lists, F2 Touch shows the top 25 records as long as the list was previously opened while connected to the Internet.

If a record is accessed from a different list than "My inbox", e.g. "My desktop", it must have been opened while online in order to be accessed and managed offline in F2 Touch.

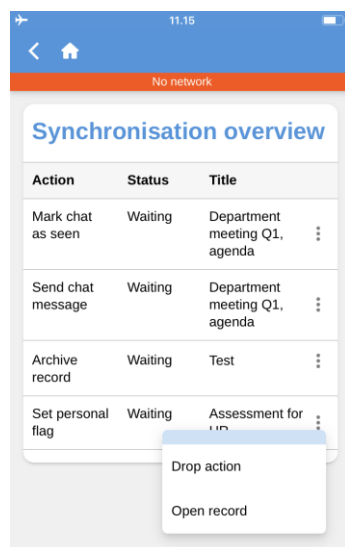
In F2 Touch it is possible to perform the following record actions offline:

- Create/save/send record.
- Edit the record's metadata (set/change personal and unit control, flag deadline, registered and access control).
- Mark record as unread.
- Archive record.
- Delete record.
- Search for users in own authority as well as external participants on locally saved records. This makes it possible to answer emails while offline.

It is also possible to perform all actions related to chats and make use of the case help while offline.




**Figure 101: Go to the synchronisation overview**



**Figure 102: The synchronisation overview showing queued actions**

Actions that are performed offline in F2 Touch are automatically placed in a queue on the device and can be viewed in the synchronisation overview. Tap


**Synchronisation overview**  above the list view to view the queue.

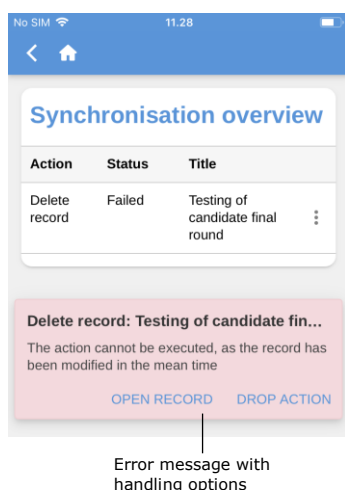
This is a list of actions waiting to synchronise as displayed below.

When F2 Touch is back online it automatically updates the actions that were performed while offline.

If more than one action has been performed on a record while offline, they will be updated in the order they were performed.

If actions have been performed on more than one record, they will be updated simultaneously when F2 Touch is back online.

Tap the menu  next to a record to either cancel the action or open the record.



**Figure 103: The action failed as the record has been modified in the meantime**

If an action related to a record fails due to e.g. a server or synchronisation error, the user must decide how F2 Touch proceeds.

F2 Touch informs the user why the action failed and depending on the error will suggest possible further actions.

Failed actions are managed directly from the overview. Tap the wanted action and it will be performed instantly.

The error handling options may be:

- **Cancel action** (applies to all actions).
- **Open record** (applies to all actions when the record is not open).
- **Try again** (in case access is lost or server error).
- **Perform anyway** (in case of synchronisation error in connection with personal control).
- **Show offline record** (when editing a record, F2 shows the local version saved offline).
- **Open record for editing** (when editing record fails due to server error).
- **Create draft record** (when editing record).

**Note:** When multiple actions are performed on the same record and one fails, all subsequent actions on the record will also fail.

## Offline actions with the “Unknown” status

If an offline action such as “Send record” or “Send chat” are not synchronised with F2, the record in question receives the “Unknown” status. Critical actions such as these are shown at the bottom of F2 Touch in the same way as failed actions. The user must decide what to do with an “Unknown” record. The following actions are possible:

- **Open record** to see if the action in question has been performed.
- **Try again** to attempt to perform the action again.
- **Cancel action** to cancel any changes.

This view ensures that the user is informed of offline actions with the “Unknown” status.

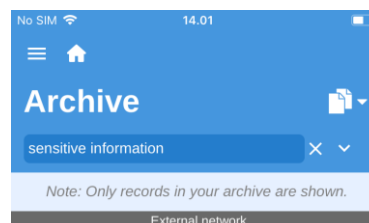
## F2 Touch Light

F2 Touch Light is a configuration which provides limited access to data in F2 Touch when on an unsecure network. A user can only access and view records in "My Archive".

The setup of F2 Touch Light is performed in cooperation with cBrain.

With F2 Touch Light set up, a user has access to cases but can only see records on a case if they are located in "My archive".

A user can access their lists as in F2 Touch, but only the records located in the user's archive will be displayed.



**Figure 104: Notification shown above lists that are not based on "My archive" searches**

For lists based on personal searches in the "Archive", a notification is shown at the top reminding the user that only the records in the user's archive are displayed.

The notification does not appear on lists based on personal searches in "My Archive".

The purpose of F2 Touch Light is to ensure that unauthorised persons do not have access to the organisation's data (i.e. the "Archive") if a user loses their phone.

It is possible to set up automatic activation of F2 Touch Light when a user switches from an organisation's network to an external or unsecure network.

F2 Touch Light functions with the following add-on modules in the described way:

- **F2 cSearch:**  
Can only be used to search for records located in the user's archive. It is not possible to search for cases.
- **F2 Manager:**  
Cannot be accessed from F2 Touch Light.
- **F2 Management cabinets:**  
Cannot be accessed from F2 Touch Light.

# Using add-on modules in F2 Touch

The four sections below describe how certain add-on modules function in F2 Touch:

- F2 Requests
- F2 Approvals
- F2 cSearch
- F2 Manager

The described functionality is only available if the relevant module has been purchased.

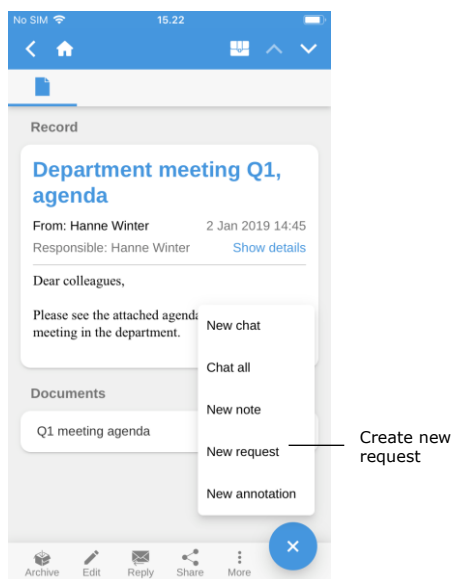
## F2 Request


There are three types of requests:

- The internal request (standard request), which is a formal request to a user or unit to perform a task within the organisation.
- A group request, which is a request to a user or unit to perform a task, sent from one authority to another within the same F2 installation.
- An external request, which is a request to perform a task from one F2 installation to a user or unit in another F2 installation.

Read more about the different types of requests in the user manuals *F2 Request*, *F2 Group request* and *F2 External request*.

## Create and manage standard requests




A new request is created through a record. Tap **Add**  and then **New request**.

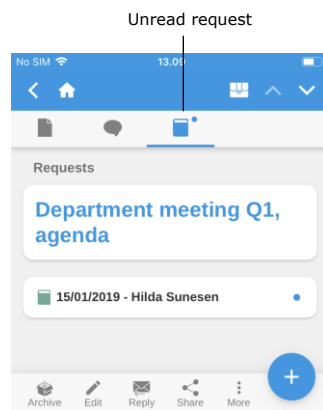
**Figure 105: Create new request**

When creating a request, the user must enter certain request metadata along with the request's recipient. This procedure is the same as when creating requests in F2 Desktop.


The screenshot shows a mobile app interface for creating a request. The title bar is blue with a back arrow, a home icon, the title 'Request', and a document icon. The status bar at the top shows 'No SIM', signal strength, and the time '12:59'. The form is divided into several sections: 'Types' with a 'See text field' button and an 'Add type' link; 'Receivers' with a selected receiver 'Hilda Sunesen (Chief consultant, HR)', an 'Add additional receivers' link, and a checked checkbox 'Visible to the unit'; 'Deadline' with a date '15/01/2019' and a time '23:59'; 'Return to' with a selected user 'Hugo Hugosen (Case manager, HR)' and a checked checkbox 'Notify creator and "Return to" upon executed'; and 'Description' with a text area containing 'Please review and submit input on our recruitment process for 2019'. At the bottom, there are 'Save' and 'Send' buttons. A modal box is open over the 'Send' button, showing 'Send and set responsible' and 'Send' options.

When a user receives a record with a request on it, it is placed in the user's inbox with the request icon . The request is accessed through the record. The request can also be accessed from the answer record that is created when a request recipient formally initiates the execution of the request.

**Figure 106: Newly created request**

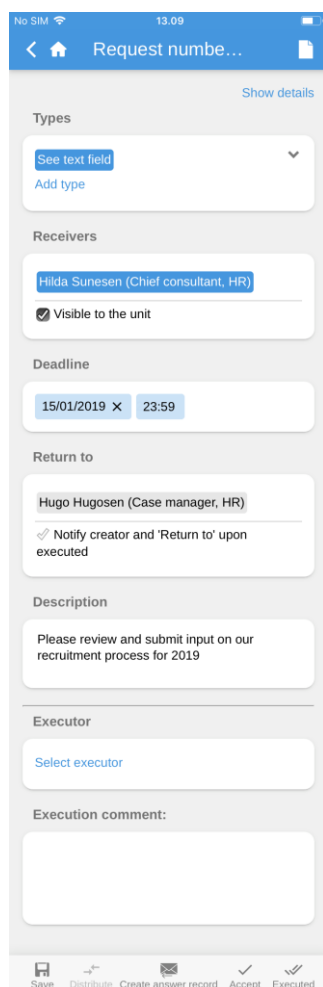


**Figure 107: A request on a record**

Open the record with the request and tap the request icon , as shown in the figure to the left.

This opens the request, as shown in the figure below.

A reply to a request received in F2 Touch is created, processed and completed in the same manner as in F2 Desktop.



**Figure 108: A request**

A group request will appear in both the recipient's personal inbox and the unit's inbox. In F2 Touch it is possible to open the request on the record and view all related details, but it cannot be edited.

An external request will appear in the unit's inbox only. Contrary to group requests, it is not possible to open or view details for external requests when using F2 Touch. However, the request is still visible on the record under "Requests".

## Show request history

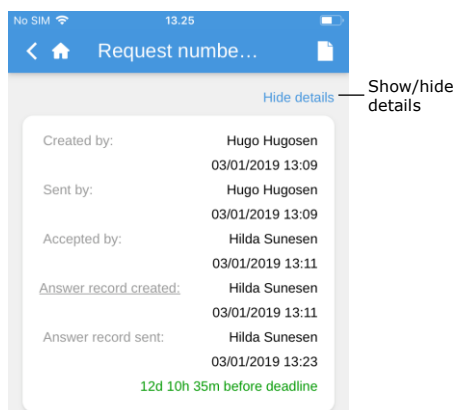


Figure 109: The request history

To gain an overview of the request's history tap **Show details** as shown to the left. An overview is then displayed with information about all activities related to the request. This can for example be request creator, who accepted it, when an answer record was created, etc.

Read more about the different types of requests in the user manuals *F2 Request*, *F2 Group request* and *F2 External request*.

## F2 Approvals

F2 Approvals meets the need to execute formal approvals of produced materials. Approvals can be accessed from the list view.

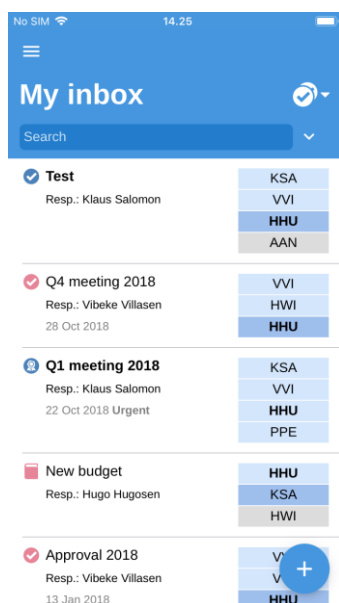
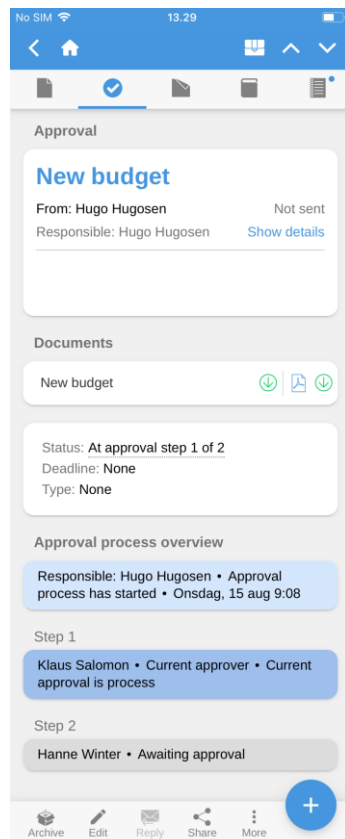


Figure 110: A list of records in an approval flow

To view a list containing all the records in an active approval flow, tap the **list view mode** and then **Approvals**. The list will only contain approvals that the user has permission to view.



## Show approval

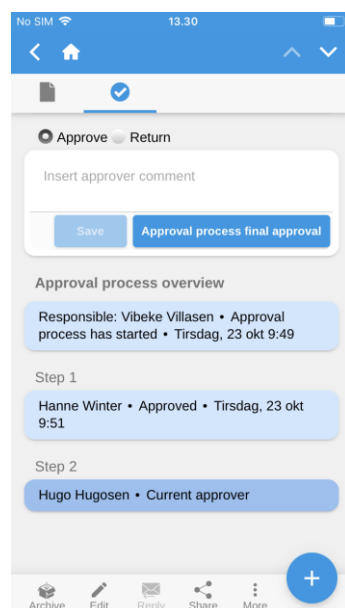


**Figure 111: The approval view**

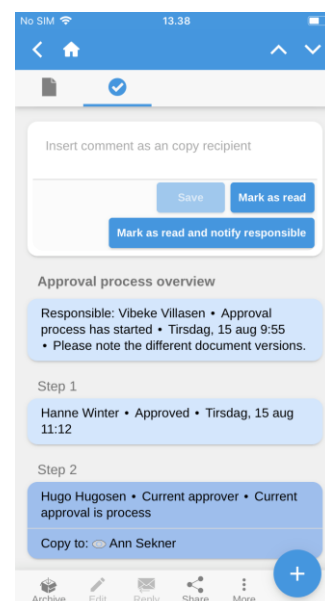
Switch to the approval view by tapping the **approval icon** (checkmark) located in the record's grey ribbon.

The approval flow is displayed under the "Approval process overview" field. An approval can be processed if it is located with one of the following:

- A user who has been appointed as approver.
- A user with "on behalf of" rights.
- A copy recipient.



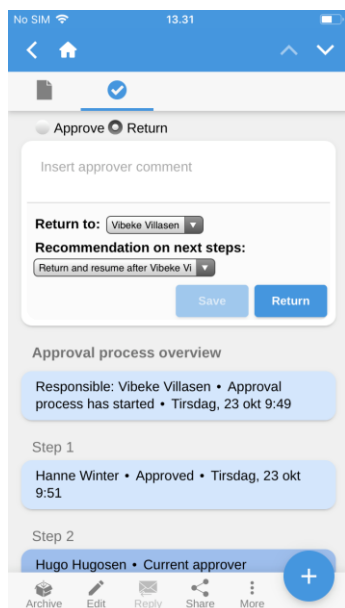
**Figure 112: Processing the approval as an approver**



**Figure 113: Processing the approval as a copy recipient**

An approver can approve or return the approval with or without a comment.

If the user is set as a copy recipient, the user can mark the approval as “seen” and has the option of notifying the responsible user and adding a comment.



An approval is returned as in F2 Desktop.

When returning, it is possible to select to which user the approval returns and with which user the approval resumes.

**Figure 114: Returning an approval**

## Create and edit approvals

It is possible to create, start and edit approvals in F2 Touch. The options for creating and editing approvals are dependent on the configuration settings. Configurations are performed in cooperation with cBrain.

The following is possible as a standard:

- Approvals can be created on existing records using a template.
- Approvers and copy recipients can be edited on every step.
- Approval steps can be deleted.

The individual functions are described in the following section.

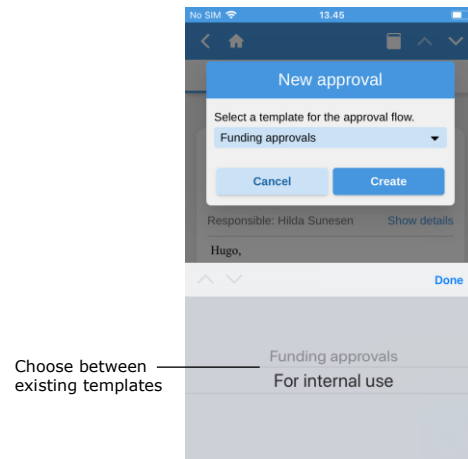
## Create new approval

It is possible to create a new approval using existing templates in F2 Touch.

The templates are created and maintained in F2 Desktop.

An approval can be started in F2 Touch.

Options available to a user when creating approvals with or without an approval document can be configured. Any configurations are performed in cooperation with cBrain.



**Figure 115: Create a new approval using a template**

## Edit approval

Approvals can be edited in F2 Touch. The following actions are available:

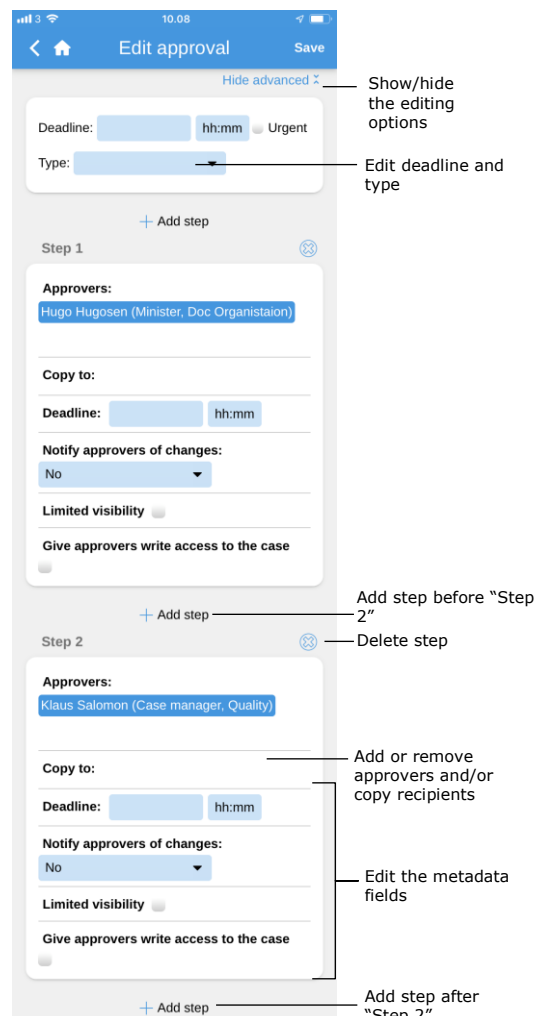
- Add step.
- Edit the approval deadline.
- Select type from the drop-down menu.
- Delete step.
- Add or remove approver and/or copy recipient.
- Edit other metadata fields, e.g. "Limited visibility", "Notify approver", etc.

The following actions are not possible in F2 Touch:

- Edit deadlines for individual steps.

Tap "Show advanced/Hide advanced" to show or hide the options for editing.

It is only possible to edit steps that the approval has not yet reached.



**Figure 116: Edit approval**

## Offline approval actions

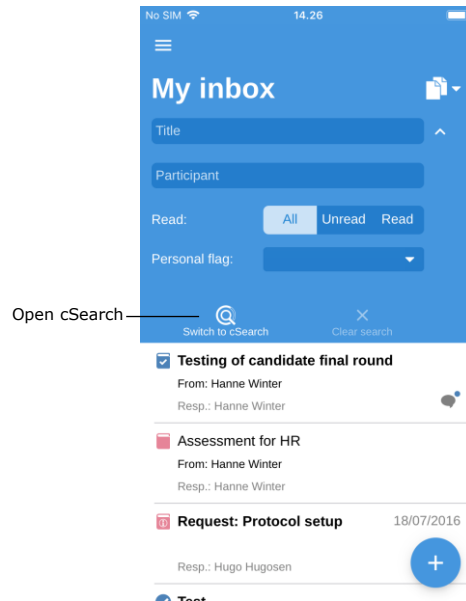
It is possible to perform a number of actions in F2 Approvals when F2 Touch is offline. It is possible to perform the following actions:


- Processing/saving/approving approvals.
- "Seen" marking of approvals as a copy recipient.
- Editing an approval document.

For more information, see *F2 Approvals – User manual*.

## F2 cSearch

F2 cSearch enables a quick free text search across all data in F2 to which the user has access.



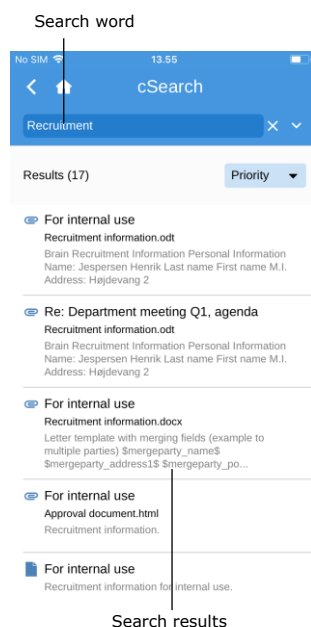
cSearch can be found by expanding the search options in all lists. Tap  next to the search field and then open cSearch by tapping **Switch to cSearch**.

**Note:** cSearch can be accessed from all lists in F2 Touch.

**Figure 117: Open cSearch**

## Quick search

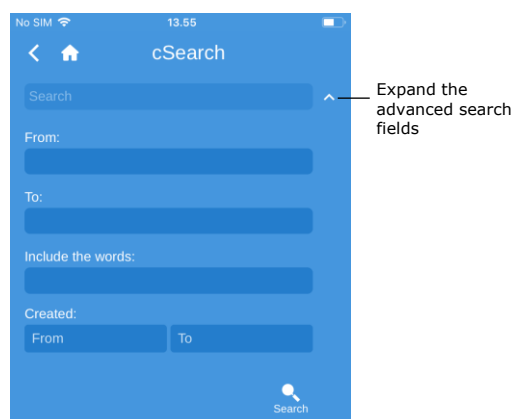
A quick search for a search word is performed by entering the search word in the search field. The search will then start automatically.



**Figure 118: A search using cSearch**

## Advanced search

cSearch in F2 Touch contains the same advanced search features as it does in F2 Desktop.



**Figure 119: Advanced search**

The search finds all contexts in which the search word/search text are included, both as a complete word and as part of a word.

To search for an entire word, enter a space in the search field after the last letter.

Tapping a result will display the corresponding record.

**Note:** In cSearch, it is also possible to search using operators. For more information, see the section *Sorting the search results*.

The advanced features allow e.g. searches for values in metadata fields such as "From", "To", "Created" or for the specific content of a record, case, chat, note, etc.

For more information, see *F2 cSearch – User manual*.

## F2 Manager

F2 Manager is developed for iPads. F2 Manager provides both online and offline access to cases, meetings and approvals for the organisation's employees and executives.



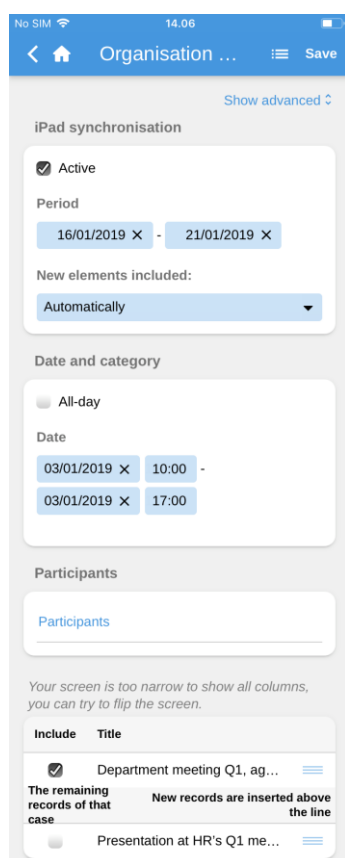
Transfer cases and records directly from F2 Touch to F2 Manager by opening a case and tapping the **case title** in the blue ribbon to view the case details. Then tap **Add** and **New F2 Manager**.

If there is already a meeting on the case, it will just say **F2 Manager**.

**Figure 120: Transfer to F2 Manager**

Tap **New F2 Manager** to open a synchronisation page for F2 Manager. This page contains relevant information associated with the transfer to F2 Manager, as shown below.

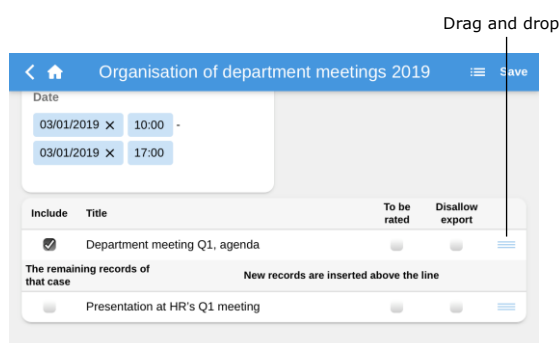
The same procedure is used here as when creating an ad hoc meeting in F2 Desktop.



**Figure 121: The synchronisation page for F2 Manager**

On the synchronisation page, specify:

- iPad synchronisation.
  - Tick the "Active" box to make one or more cases available on iPad in the time specified in the "Period" field.
  - Select whether to add new items automatically or manually to the synchronisation list.
- Date and category with a specific meeting date and time – this is an optional field that lets the user categorise the meeting.
- Participants to whose iPads the material is synchronised.
- The synchronisation list, which shows the case records to be transferred to F2 Manager.
- Removing a tick from a record will move it to the list called "The remaining records of that case". A record can also be moved by dragging it with a finger.
- "The remaining records of that case" is a list of records that will not be synchronised to F2 Manager.



**Figure 122: The synchronisation and "The remaining records of that case" lists**

When a user rotates the screen 90 degrees, F2 Touch will adjust so that all columns become visible.

By dragging a record with a finger, it is possible to change the order of the records or move records from one list to another. Press **Drag and drop** and drag the record to the wanted location using a finger.



Tap **Show advanced** at the top of the synchronisation page to add:

- Stakeholders.
- Title and description of the meeting.
- When evaluations can be submitted (until X hours before the start).
  - I.e. the individual items on the agenda are marked for evaluation so that each participant can comment on the agenda items within the given time frame.
- When the evaluations can be shared (X hours before start).

The screenshot shows a mobile app interface for F2 Manager. At the top, there's a status bar with 'No SIM', signal strength, and time '14.07'. Below that is a navigation bar with a back arrow, a home icon, the text 'Organisation ...', a menu icon, and a 'Save' button. The main content area is divided into three sections: 'Participants' with two input fields labeled 'Participants' and 'Stakeholders'; 'Additional information' with a 'Title' field and a larger 'Description' field; and 'Ratings' with two rows of input fields. The first row is labeled 'Can only be submitted until:' and the second row is labeled 'Not shared until:'. Both rows have a numeric input field followed by the text 'hours before the start'.

**Figure 123: An expanded view of F2 Manager's synchronisation page**

Once the user has entered the information, tap **Save**.

**Note:** In F2 Desktop, an F2 Manager tab is added to the case when a "New F2 Manager" is created via F2 Touch.

## Annotations made in F2 Manager

In F2 Manager, it is possible to add annotations to documents attached to a meeting. This is a quick and easy way to add comments. Important sections in the document may be highlighted for later use.

Opening F2 Touch after making annotations in F2 Manager will automatically display the case with which the annotation record/document is associated. Annotation records can be found by searching the "Archive". Specify the user who made the annotation in the "Record/case responsible" field, and then enter "F2 Manager archive" in the free text search field to perform the search.

This will show all records annotated by that user, and the search may be saved to allow future annotations to be accessed quickly.

However, the annotations will not be visible if F2 Touch uses Apple's PDF viewer, which does not support these annotations. To accommodate this, F2 Touch allows the user to export the document to another app that can read annotations (such as Acrobat Reader for Apple and Android).

For more information, please see *F2 Manager – User manual*.

## Supported browsers

F2 Touch is optimised for the following browsers:

- Google Chrome, latest version.
- Mozilla Firefox, latest version.
- Apple Safari for Mac, latest version (not on a Windows PC).
- Apple Safari for iOS, two latest versions.
- Android version 4.1 and later.
- Microsoft Edge, latest version.

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