F2

Touch

Version 9

9.1.0.16653

Table of contents

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 applied depending on window size:

- **Compact layout**: For devices with smaller screens such as iPhones and Android phones.
- **Wide layout**: For devices with larger screens such as 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 with 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 setup sections are divided based on operating system: *Setup and settings for iOS* and *Setup and settings for Android*.

F2 Touch Intune

cBrain offers an F2 Touch module that is compatible with Microsoft Intune. F2 Touch Intune has functions similar to that of F2 Touch, but is subject to the security model configured in Microsoft Intune by the organisation. Contact cBrain for further information.

Note: F2 Touch Intune requires the F2 Touch add-on module.

Setup and settings for iOS

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

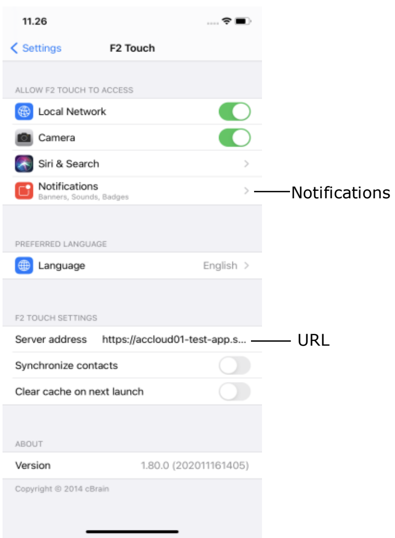


Figure 1: Server address on iOS

To set up F2 Touch on an iPhone or iPad, tap **Settings**  on the device. Tap **F2 Touch** in the menu to navigate to the F2 settings screen.

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

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 login method as long as the configuration allows it.

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

Log in using a password on iOS

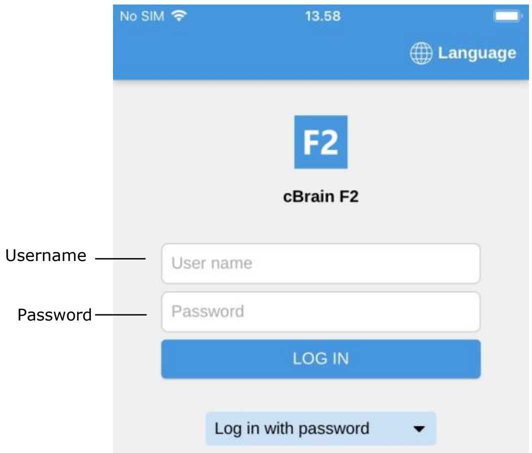


Figure 2: Log in using a password

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

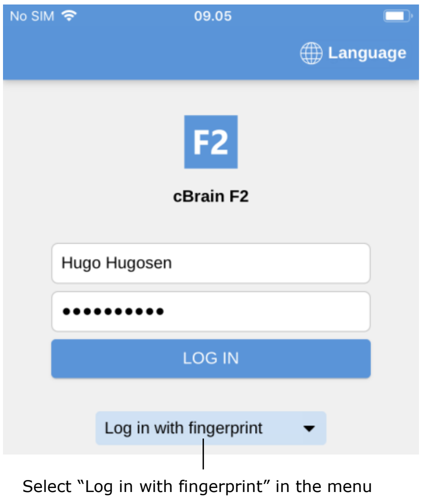


Figure 3: Activate Touch ID

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.

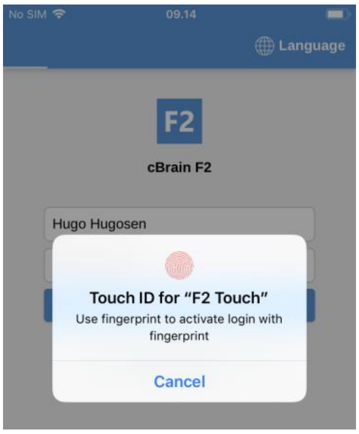


Figure 4: Log in using Touch ID

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.

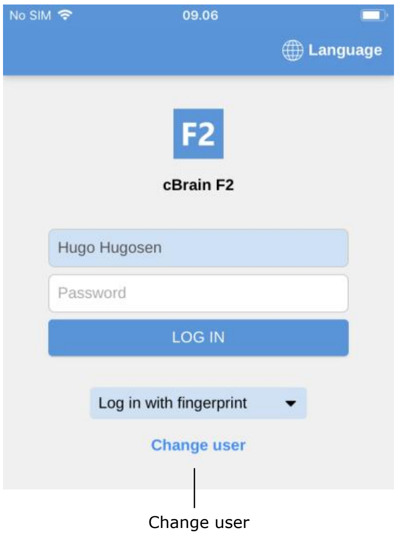


Figure 5: Change user

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.

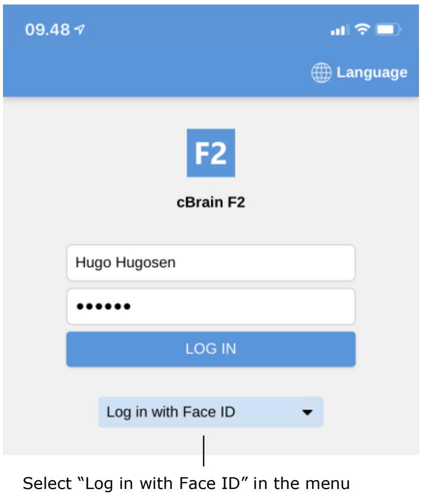


Figure 6: Activate Face ID

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.

Log in using "Remember me" on iOS

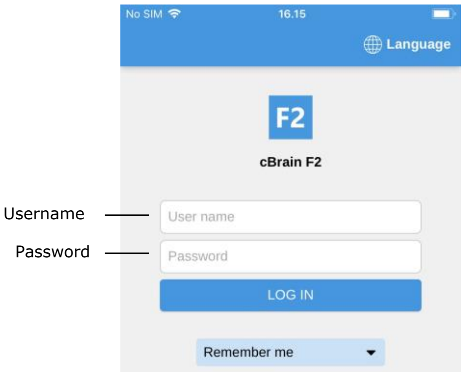


Figure 7: Log in using "Remember me"

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.

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

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 login role selector

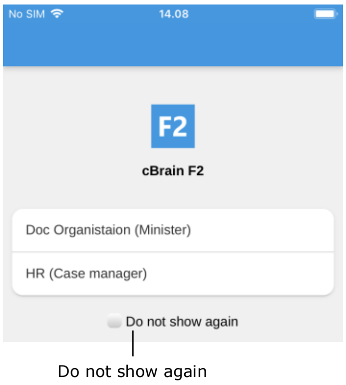


Figure 8: Select role at login

If a user has multiple roles in F2, they can choose between them during login.

Tap "Do not show again" to avoid being presented with the role selector during the next login.

It is possible to choose a default role in the "Setup" dialogue on F2 Desktop. If a default role has been set up, the user is automatically logged in with this role on F2 Touch.

For more information about default roles, see *F2 Desktop – Settings and Setup*.

Personal settings on iOS

Personal settings can be adjusted in F2 Touch.

To do this, swipe right on a list or tap the **menu icon** that is shown above the lists and folders view.

Figure 9: The menu icon

Then tap the **settings icon** in the upper right corner.

Figure 10: The settings icon

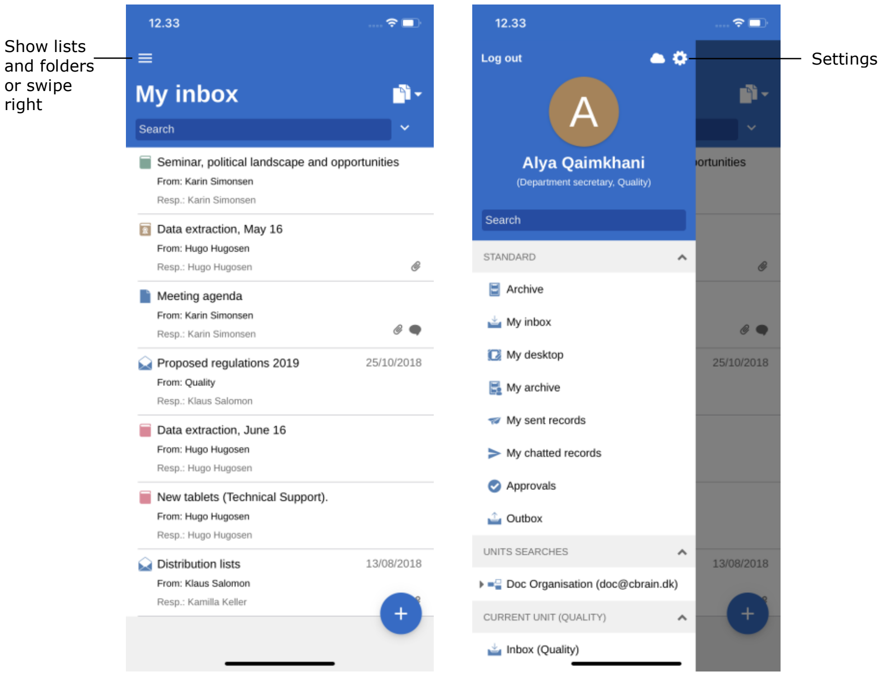


Figure 11: Open settings on iOS

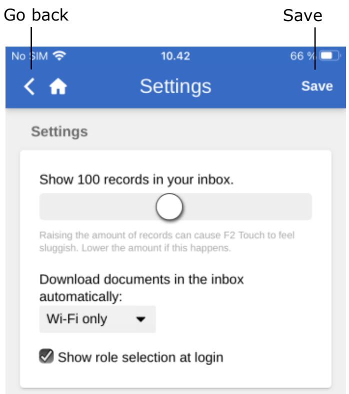


Figure 12: iOS settings

In “Settings” it is possible to adjust the number of records shown in the inbox.

It is also possible to choose when to automatically 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 automatically.

Finally, it is possible to either show or hide the role selector when logging in. This selection applies to both F2 Touch and F2 Desktop.

Save the settings by tapping **Save**. Return to the former list by tapping the **back button** 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. The first time F2 Touch is opened on an Android device, a server address must be entered. 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** to proceed to the login screen.

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.

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.

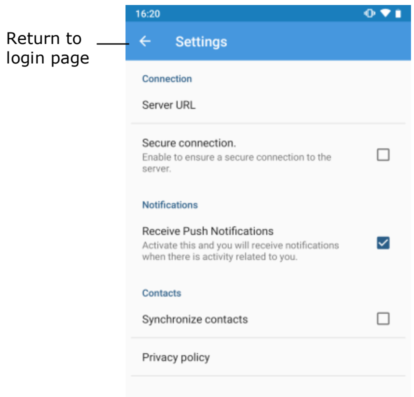


Figure 13: Android settings

Some settings can be adjusted 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.

These settings also allow the user to toggle notifications and to synchronise contacts with F2 Touch.

Tap **the arrow** in the upper left corner to save any changes and return to the login page.

Log in using fingerprint on Android

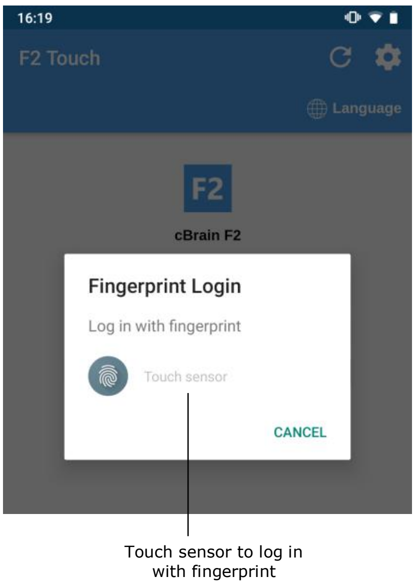


Figure 14: Activate Fingerprint Login

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 on 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 by logging in once using a password.

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

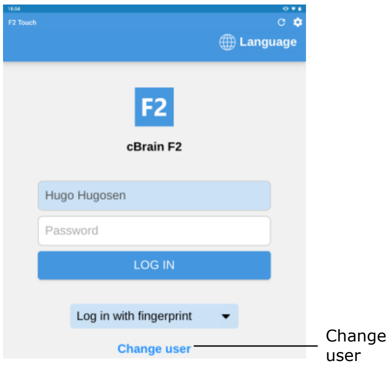


Figure 15: Change user

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 a password

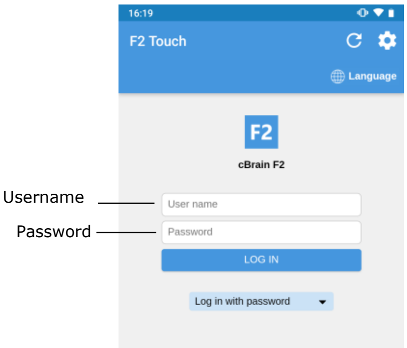


Figure 16: Log in using a password

It is possible to log in using a password similarly to logging in on F2 Desktop.

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

Log in using "Remember me"

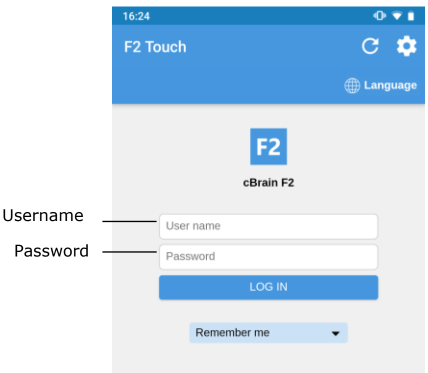


Figure 17: Log in using "Remember me"

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 login role selector

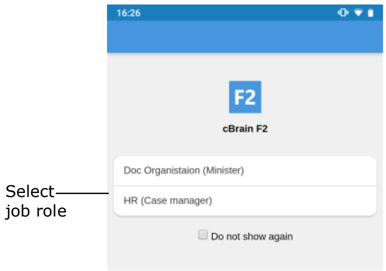


Figure 18: Select job role on Android

If a user has multiple roles in F2, it is possible to choose between them during login.

Tap "Do not show again" to avoid being presented with the role selector during the next login.

It is possible to choose a default role in the "Setup" dialogue on F2 Desktop. If a default role has been set up, the user is automatically logged in with this role on F2 Touch.

For more information about standard roles, see *F2 Desktop – Settings and Setup*.

Select language

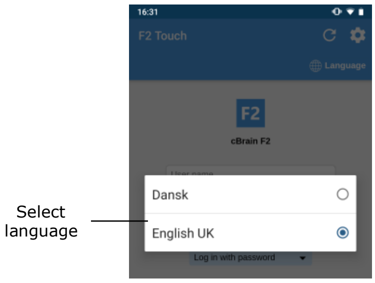


Figure 19: Select language on Android

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 do this, swipe right on a list or tap the **menu icon** that is shown above the lists and folders view.

Figure 20: The menu icon

Then tap the **settings icon** in the upper right corner.

Figure 21: The settings icon

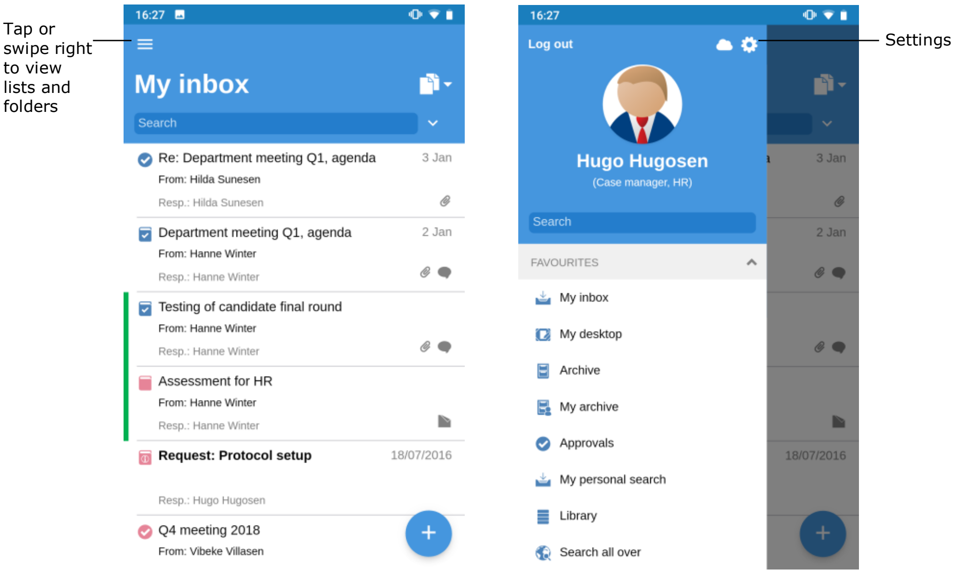


Figure 22: Open settings on Android

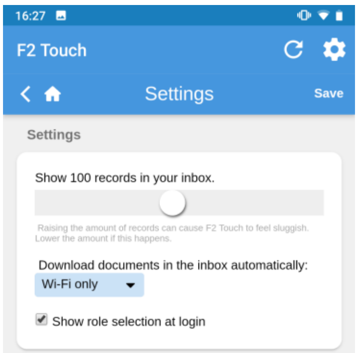


Figure 23: Customise settings on Android

In "Settings", it is possible to adjust the number of records shown in the inbox.

It is also possible to choose when to automatically 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.

Finally, it is possible to either show or hide the role selector when logging in. This selection applies to both F2 Touch and F2 Desktop.

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

Managing personal settings

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

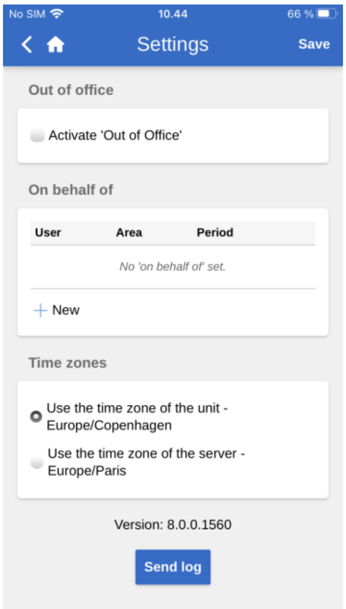


Figure 24: Managing personal settings

In F2 Touch, a user can grant "on behalf of" rights to another user and set themself as "Out of office".

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

The following sections describe 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.

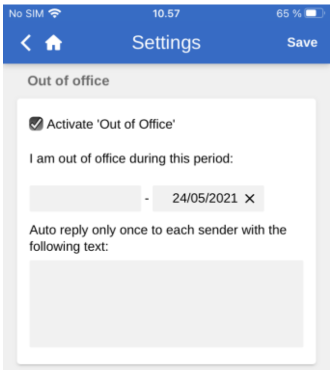


Figure 25: Setting up "Out of office"

Tap **Activate 'Out of Office'** and specify:

- Return date. Specify a period by filling out the two date fields. Tap a field to open a calendar.
- The automatic reply that is sent to those who contact the user during the absence. This applies both internally and externally.

Tap **Save** to save and apply the setup.

“On behalf of” rights

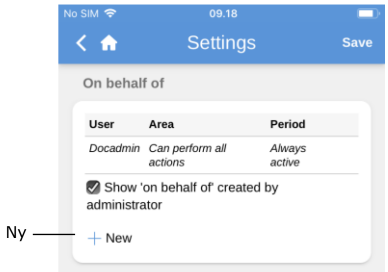


Figure 26: New “On behalf of”

A user can assign “on behalf of” rights to another user in F2 Touch by tapping **New** under the “On behalf of” header.

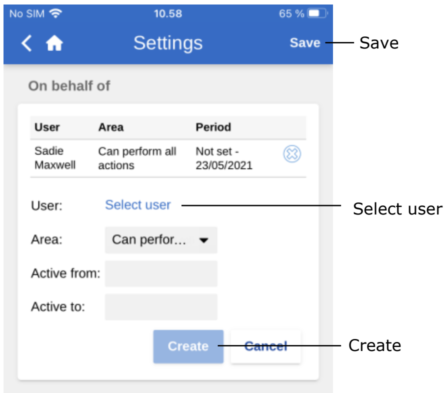


Figure 27: Setting up “On behalf of”

It is then possible to specify:

- Which user the privilege is given to.
- If the user receiving the privilege can perform all actions on behalf of the original user or only handle approvals (requires the F2 Approvals add-on module).
- When the “on behalf of” rights start.
- When the “on behalf of” rights expire.

Tap **Create** to complete.

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

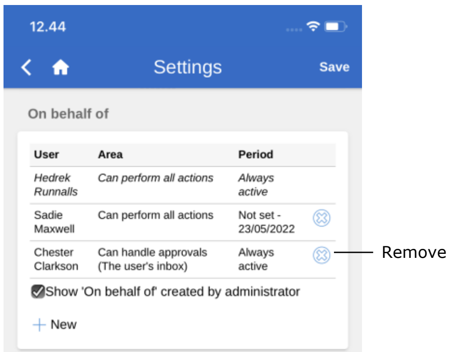


Figure 28: Remove “On behalf of”

Remove the “On behalf of” rights from a user by tapping the **delete icon** next to their username.

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 an administrator are hidden.

Select time zone

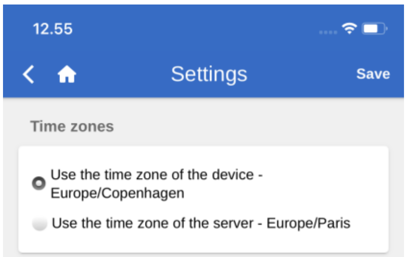


Figure 29: Select time zone

By default, F2 Touch's time and date are based on the unit's time zone.

F2 Touch can be configured to allow the use of the server's time zone. If the configuration is available, select the desired time zone in "Settings". The configuration is performed in cooperation with cBrain.

The selected time zone is used for deadlines and similar fields. If the user has chosen the device's time zone, deadlines will be shown in their 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 reflect the server's time zone.

Send log manually

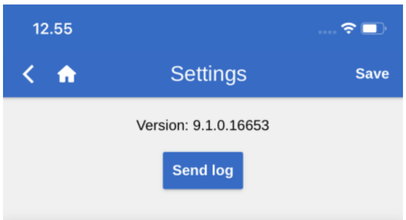


Figure 30: Send log

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 to report any errors experienced in F2 Touch.

Log out and "Remember me"

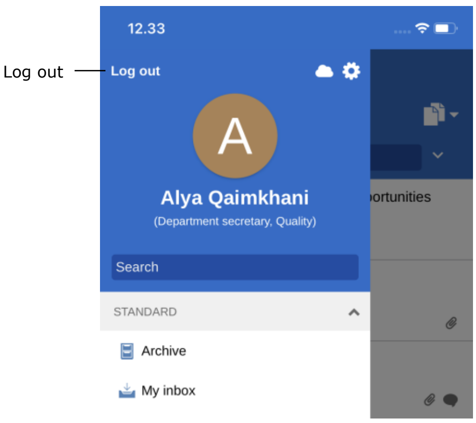


Figure 31: Log out of F2 Touch

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 logging out on all devices on which this function is active.

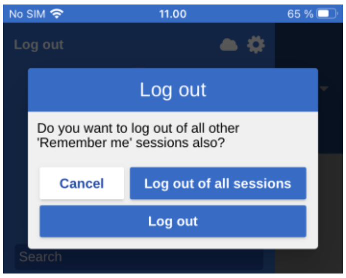


Figure 32: The "Log out" dialogue

By tapping **Log out**, a dialogue 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 keep the tick in the "Remember me" box.
- **Log out of all sessions**: F2 Touch logs the user out and 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", and favourite and personal searches. The "Latest documents" list is not available.

Show lists and folders

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

The user identification is displayed above the overview. From here the user settings can also be accessed.

The displayed lists can be filtered. To filter a list, enter a word in the search field. F2 Touch will then automatically show lists containing the search word. This provides a quick overview in a large number of lists.

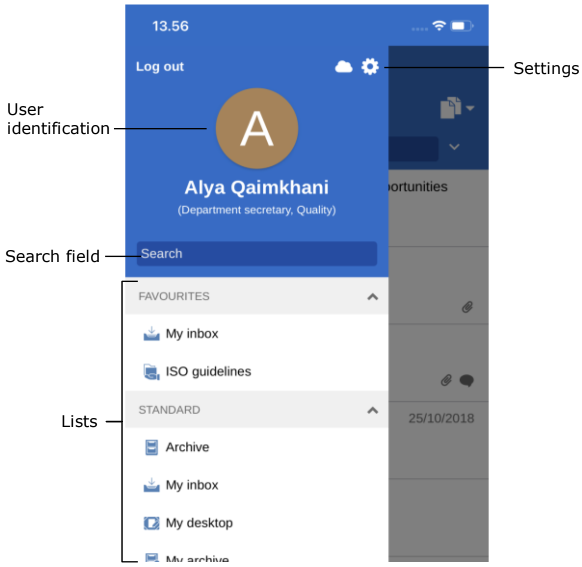


Figure 33: The overview of lists and folders

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

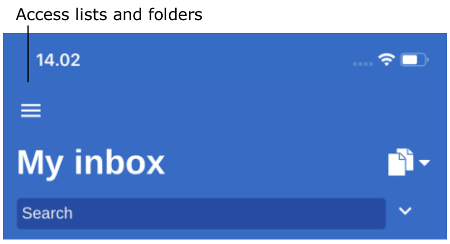


Figure 34: Access lists and folders

My inbox

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

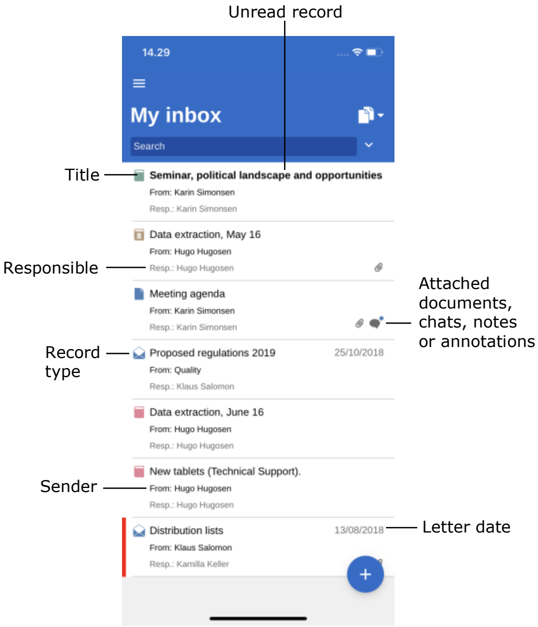


Figure 35: My inbox

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 annotations.
- Letter date, if the record has been sent.

Titles of unread records are shown in bold.

Navigating the result list

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.

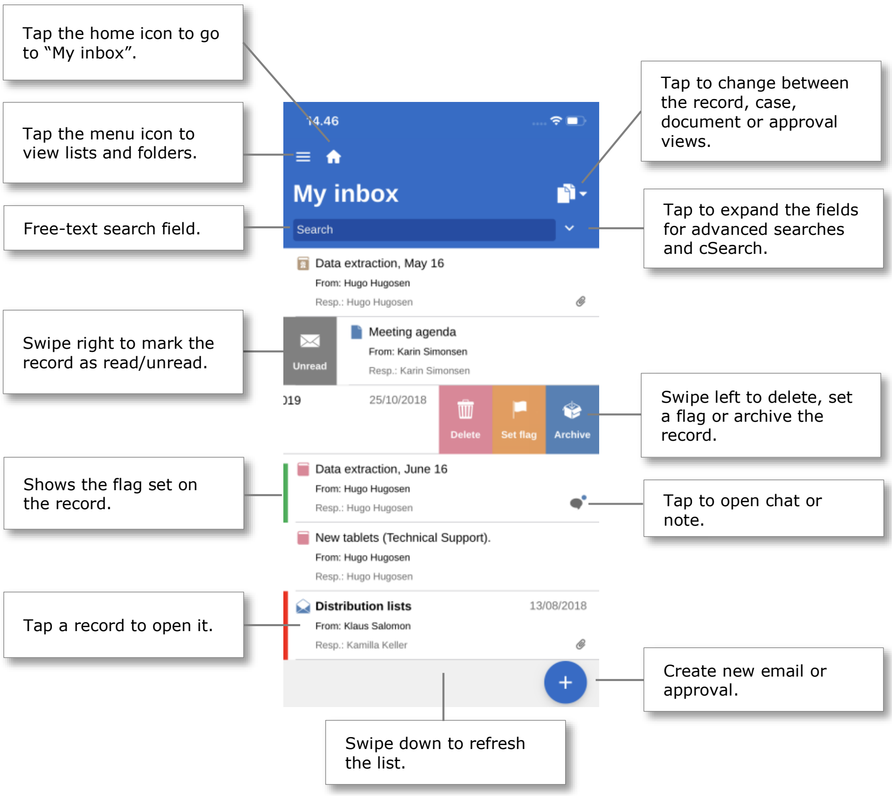


Figure 36: Navigation options for lists

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.

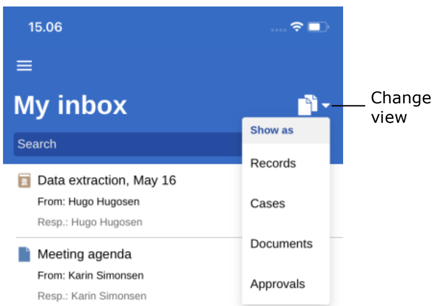


Figure 37: Change list view

Tap the **View mode icon** to switch between the different result 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.

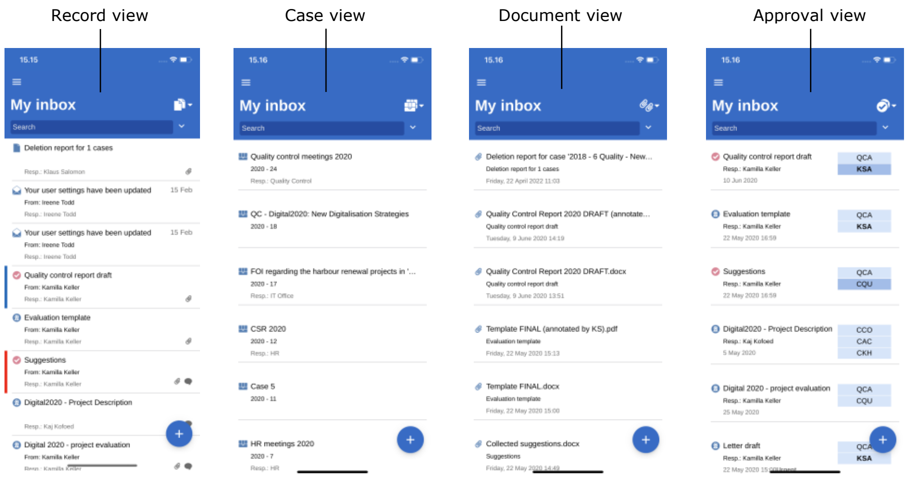


Figure 38: The four viewing options of the result list

Limitation to the number of displayed unread records

The F2 Touch app icon displays the number of unread records. No more than 99 unread records are shown, which 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 searches in *F2 Desktop – Searches*.

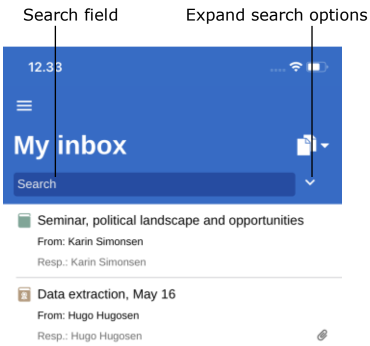


Figure 39: Search in a list

The search field is located above the result list. Use it to search in the current list.

F2 Touch will find record and case titles in the list that contain the entered search words. Tap to view other search options as well as filter options.

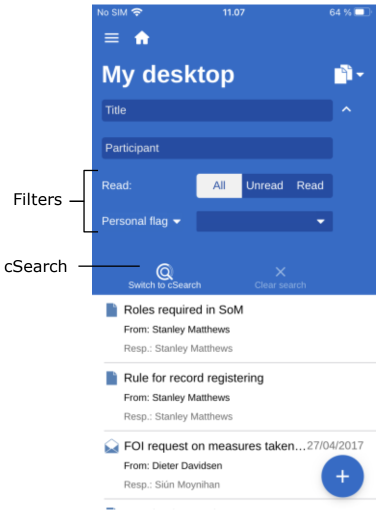


Figure 40: Expanded search options

This allows searches 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 filters records with the chosen flag.

Tap **cSearch** (add-on module) to search using this functionality. Read more about cSearch in the *F2 cSearch* section.

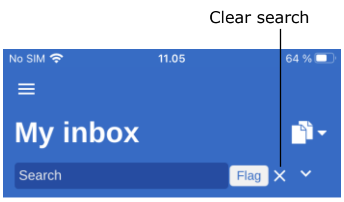


Figure 41: Search criteria

If the expanded search options are hidden while one or more are in use, any active search criteria are displayed next to the search field.

Clear the search by tapping **X**.

Sorting the search results

Search results are sorted in chronological order, so that the most recently updated record is at the top of the result list.

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

Search for records by their participants

It is possible to search for records on which a specific participant is involved. A participant is either a user or a unit from F2's participant register. Enter the name of the participant in the "Participant" search field. This search yields records in which the participant is involved as e.g. the responsible user or sender.

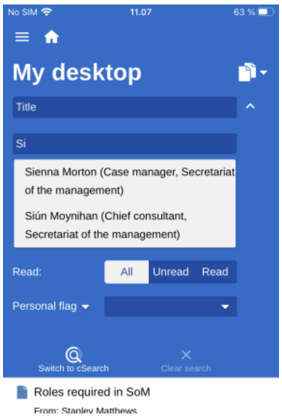


Figure 42: Search for a participant

In F2 Touch it is possible to search for records with deactivated participants. The name of a deactivated participant is displayed in italics with a grey font.

Working with records in F2 Touch

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

Show record

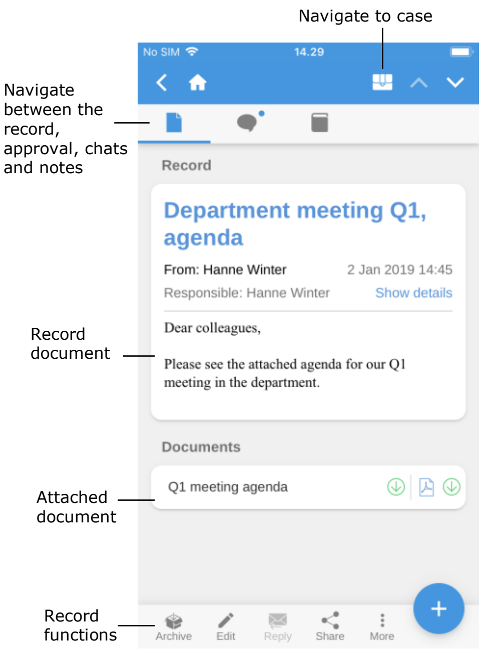


Figure 43: The record window

Tap a record in a list to open the record window. From here it is possible to work on the record document and any attached documents, chats, notes, etc.

If the record is attached to a case, navigate to the case by tapping the **case icon** in the blue ribbon at the top.

Use the icons in the upper grey ribbon to navigate between the record document, chats, and notes. If the record contains an approval or a request, their icons are also displayed here.

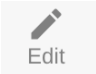
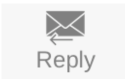
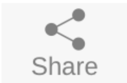
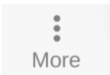
The grey ribbon at the bottom of the record window contains a number of functions for working with the record. These are described in the following section.

Functions in the record window

The bottom of the record window contains a number of functions for working with the record.

Figure 44: Functions in the record window

The user’s access rights to a given record determine which functions are available. The functions are described in the table below.

Icon	Menu item	Description
	Archive	Archives the record.
	Edit	Opens a sub-menu with the following options: • Edit record • Edit approval document (add-on module) • Edit approval (add-on module) • Change responsible • Set supplementary • Set keywords.
	Reply	Opens a sub-menu with the following options: • Reply • Reply all • Forward.
	Share	Opens a sub-menu with the following options: • Copy link to this record • Email as PDF • Approval document as PDF (add-on module) • Generate combined PDF.
	More	Opens a sub-menu with the following options: • Mark as unread • Delete record.

Tap the **add icon** + in order to perform the following actions on the record:

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

Note: Menu items relating to approvals require the F2 Approvals add-on module. 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 window

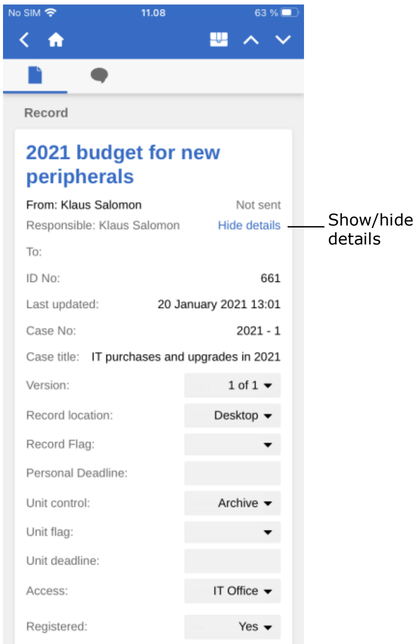


Figure 45: Show/hide details for the record's metadata

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

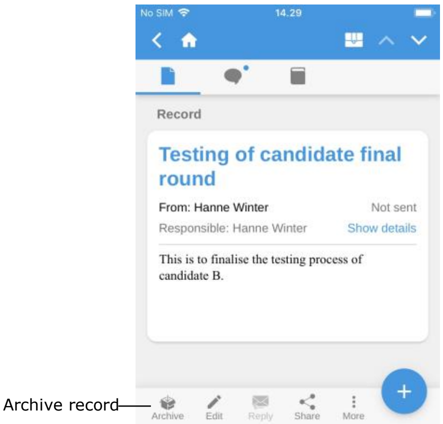


Figure 46: Archive record

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

Tap **Archive** in the bottom left corner of the record window to archive the record.

After the record has been archived, F2 displays the next record in the list.

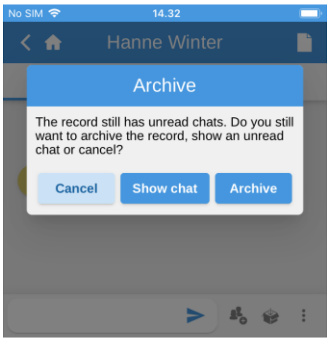


Figure 47: Archiving a record with unread chats

Tapping **Archive**  on a record with unread chats will display the "Archive" dialogue. The figure to the left illustrates the dialogue.

In the dialogue F2 Touch presents the following options: to archive the record despite its unread chats, to show the chats, or to cancel the action.

Undo action

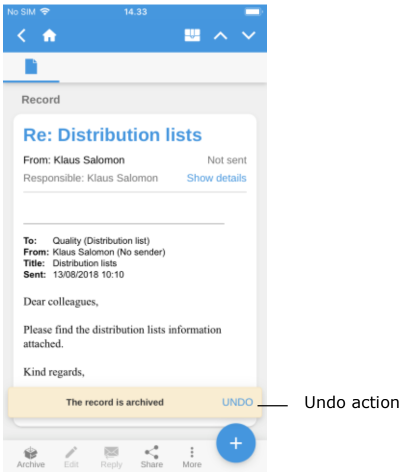


Figure 48: Undo "Archive record" action

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. Undoing 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 on the record to show the options **Delete**, **Set flag** and **Archive**.

Select **Set flag** to 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.

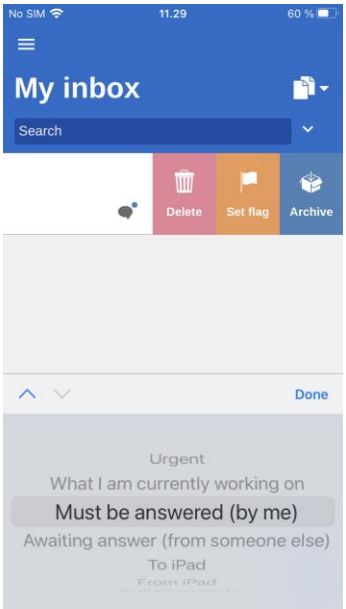


Figure 49: Allocate a flag directly from the result list

Include participant in access restriction

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

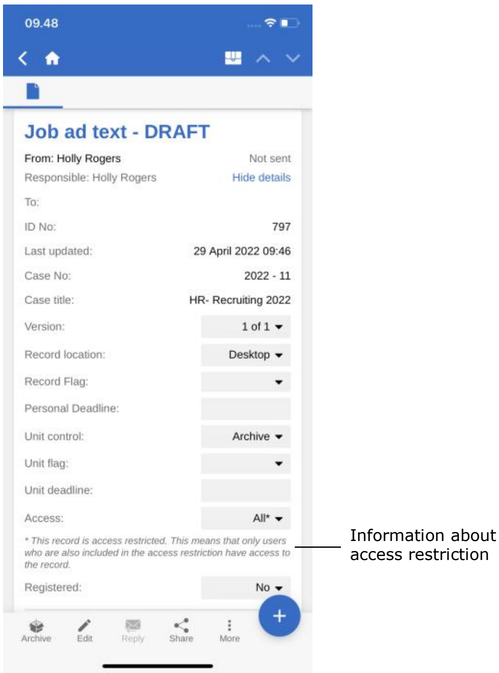


Figure 50: Information about access restriction

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 in F2 Touch:

- Send a chat
- Add chat participant
- Save a record
- Attach record to a case
- Send a record
- Approval action.

If a user attempts to share a record with internal participants who do not have access to the record, F2 suggests adding them to the record's access restriction.

The dialogue that appears makes it possible to add participants to the access restriction. If a participant is not added, they cannot see the record or the chat.

For more information about access restriction on records and cases, see *F2 Desktop – Records and Communication*.

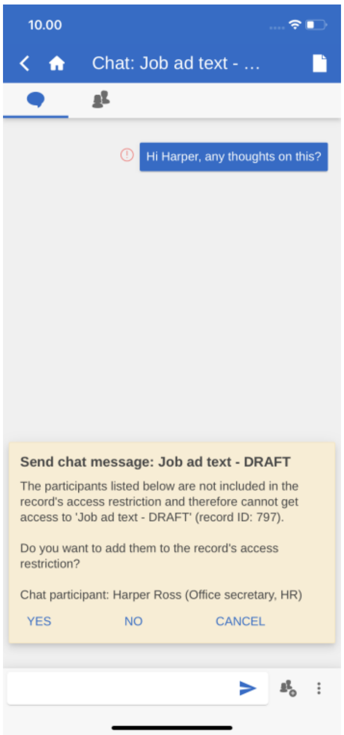


Figure 51: Include participant in the access restriction

Create email or record

Records can be created from every list in F2 Touch. To create a new record, tap the **add icon** in the bottom right corner and then **Create email**. The menu item is named by its most regular use, as F2 Touch users often create records to send them as emails. If no recipient is added to the "To" field, the record is created as a regular record.

Enter a title for the new record and enter a recipient in the "To" field to send the record as an email. Read more about sending emails from F2 Touch in the *Send email* section.

Attachments can be added to the record using the **Add** function in the "Documents" section of the "Create email" window. Read more about adding attachments in the *Add document in F2 Touch* section.

The record can be assigned to an existing or a new case in the "Case" section.

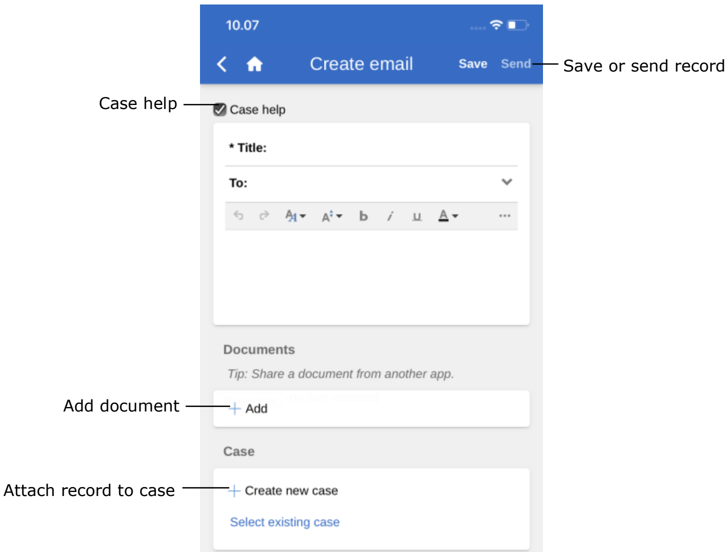


Figure 52: Create record

Tap **Save** to save the record or **Send** to send it as an email. If the "Case help" field is ticked, consider the case help dialogue's suggestions before saving or sending the record.

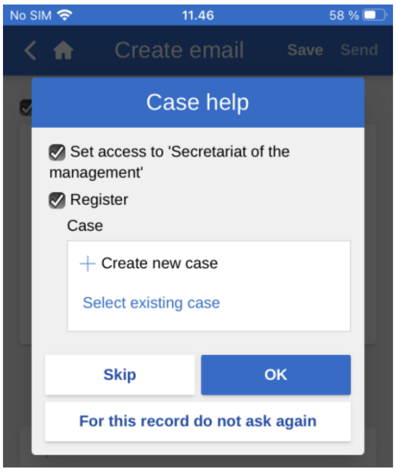


Figure 53: Case help

The case help in F2 Touch functions and appears similar to the case help in F2 Desktop. It also appears under the same conditions. Read more about the case help function in *F2 Desktop – Records and Communication*.

Edit record

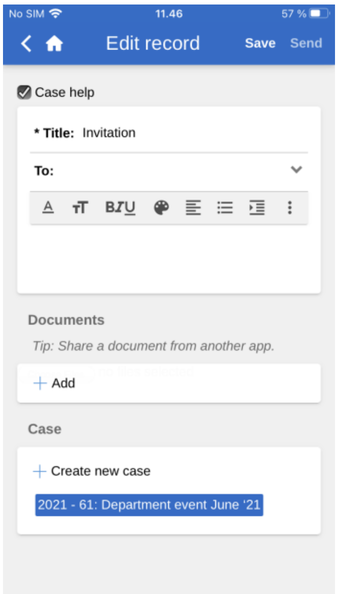


Figure 54: Edit record

Existing records can be edited in F2 Touch depending on the individual user's privileges.

Set a record in edit mode by tapping **Edit** and then **Edit record**.

When the record is in edit mode, it is possible to edit its title, the record document, recipients (for emails), attached documents, and case association.

The functions of toolbar in the record document are similar to those in F2 Desktop. Expand the toolbar by tapping the three dots to the right on the toolbar. Read more about editing options in the record editor pane in *F2 Desktop – Records and Communication*.

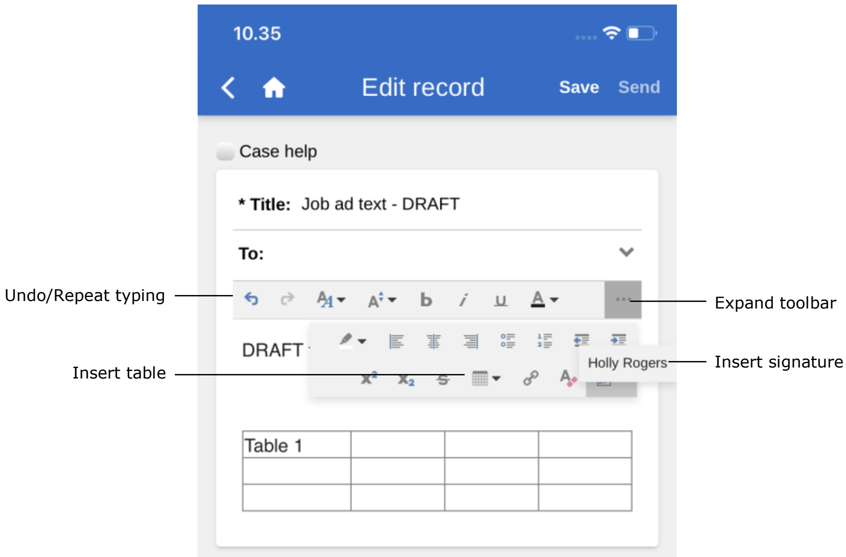


Figure 55: Expanded toolbar in a record document

When the record is in edit mode, it is also possible to edit any attached documents. These can be added, updated or deleted, which the following sections describe.

In edit mode, a new document can be created using other apps opened through F2 Touch. This action attaches the new document 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 device's file system.

Note: This function is available in F2 Touch for iPhone, iPad or web browser.

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

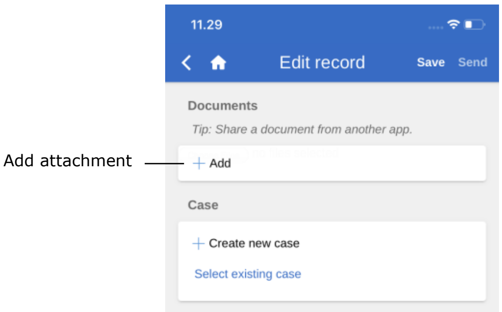


Figure 56: Add document

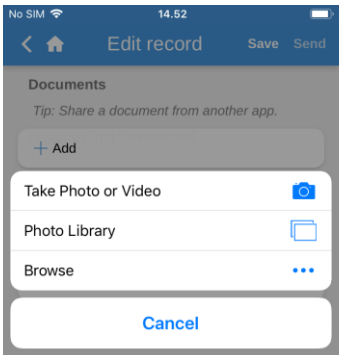


Figure 57: The file selector on an iPhone

Tap **Add** in the "Documents" section to open the device's file system.

The following options are available 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. Browse through all files saved on the device.

Using one of the above methods, 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.

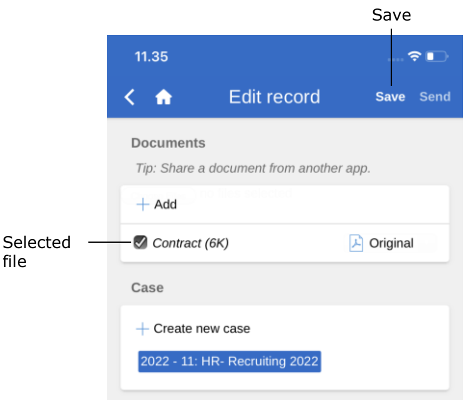


Figure 58: Add document, then save the record

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

Tap **Save** to attach the selected 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 from the device's file system. If F2 Touch is accessed from a web browser, the existing document will be overwritten.
- Open the document in another app to edit, and then re-import the document to F2 Touch.

The two methods are described in further detail in the following sections.

Edit document by overwriting it with an existing file

> **Note:** This method applies only when accessing F2 Touch via a web browser.

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

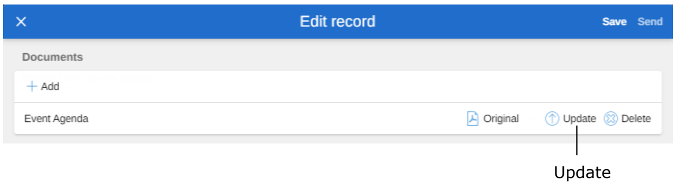


Figure 59: Update attached document

Overwrite an attached document by tapping **Update**  in the "Documents" section. This will open the unit's file system from which the desired file can be selected.

Once the file has been selected, tap **Save** to attach it to the record. The new file replaces the existing attachment.

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

Edit document using an external app

> **Note:** This method applies when accessing F2 Touch via a mobile device such as iPhone, iPad or Android phones/tablets.

Editing an attached document consists of three steps: exporting the document to an external app, editing in the external app, and then reimporting the edited document to F2 Touch. This process is described in detail below.

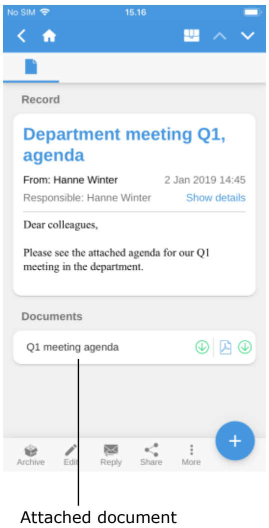


Figure 60: Attached document on a record in read-only mode

First, open the document in F2 Touch by tapping its title. The record must be in read-only mode.

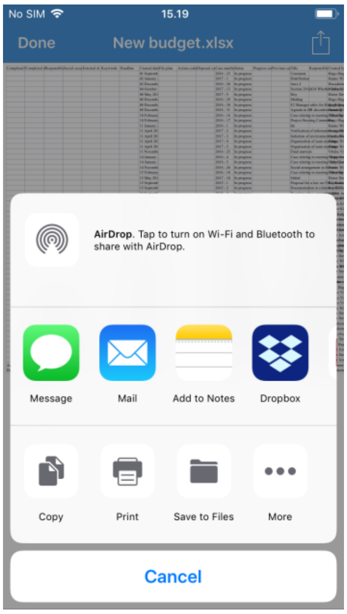


Figure 61: Document interactions on iPhone

With the document open in F2 Touch, tap the **document interaction icon**:

- Tap on an Apple iOS device.
- Tap on an Android device.

From here, select the external app in which to edit the document.

When editing is done, save the document. Then the document is ready to import to F2 Touch. This is done in the following way:

Figure 62: Copy to F2 Touch via document interaction

Tap the **document interaction icon** in the app:

- Tap on an Apple iOS device.
- Tap on an Android device.

Select **Copy to F2 Touch**. The document is then sent back to F2 Touch. F2 Touch asks for confirmation before replacing the original document on the record.

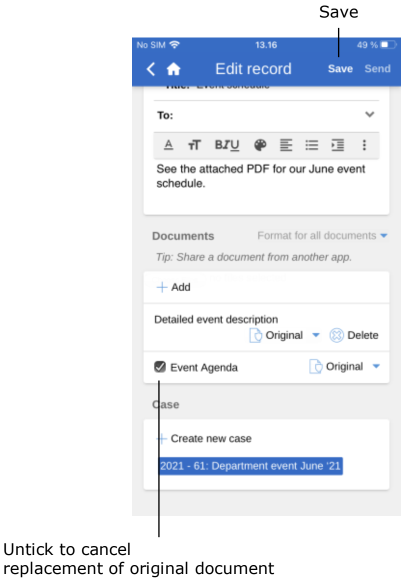


Figure 63: Document added from external app

An edited document can also be sent back to a record in edit mode. In this instance the edited document appears on the record in the same manner as a new attachment in the "Documents" section. It is not possible to keep both versions of the document, but it is possible cancel the addition of the edited document and keep the original. To do this, untick the box next to the edited document's title.

Tap **Save** to finish the operation.

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.

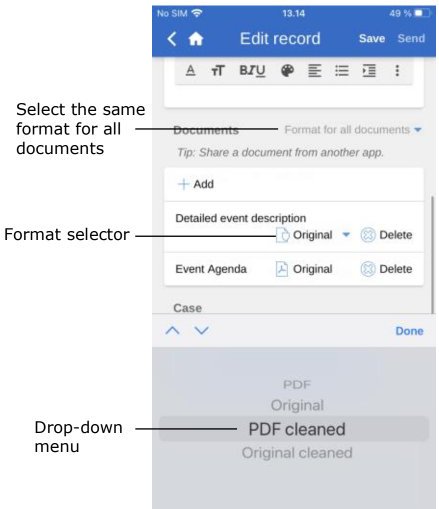


Figure 64: Format selector

Set the record in edit mode. The document format can be selected next to the attached documents in the "Documents" section. 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. From here, select a format.

The following format options are available:

- PDF
- Original
- PDF cleaned (requires the F2 Metadata Remover add-on module)
- Original cleaned (requires the F2 Metadata Remover add-on module).

The default format in F2 Touch corresponds to the format selected by the user in their individual setup in F2 Desktop.

Delete document

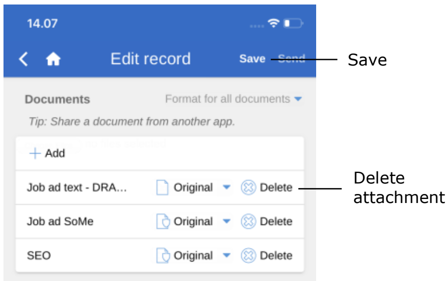


Figure 65: Delete document

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

Switch to edit 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**.

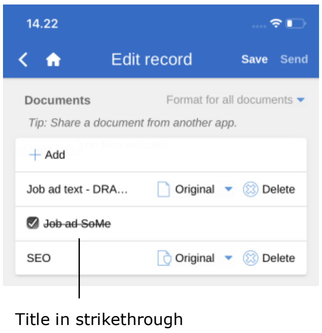


Figure 66: A deleted document

The title of a document that is about to be deleted is written in strikethrough text as shown in the figure to the left.

Communication options on the record

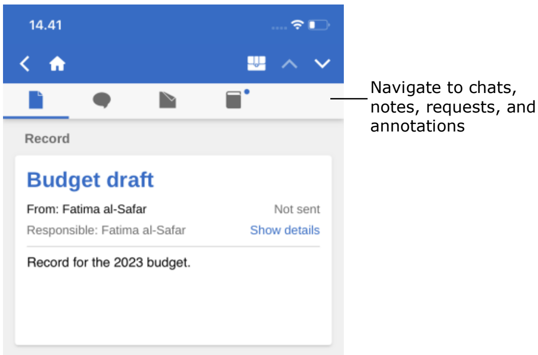


Figure 67: Communicating on the record

A record may contain chats, requests, notes, and annotations. If any of these are present on the record, they can be accessed using the icons on the upper grey ribbon.

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

A little blue dot next to a communication icon indicates an unread item the record. For example, the icon indicates an unread request.

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

Send email

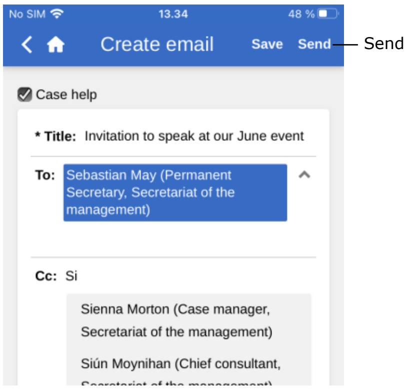


Figure 68: Sending an email record

Enter a recipient in the "To" field. As in F2 Desktop, F2 Touch then searches the participant register for participants matching the entered data. The same applies to the "Cc" and "Xbc" fields.

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

Tap **Send** to send the record as an email.

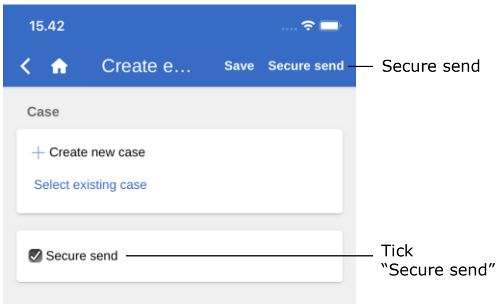


Figure 69: Secure send

In F2 Touch it is also possible to use the "Secure send" function (configuration).

"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, see *F2 Desktop – Records and Communication.*

Tap an email address to create a new email record

Tap an email address link in a record document to create a new email record. The new email record is created with the email in the "To" field.

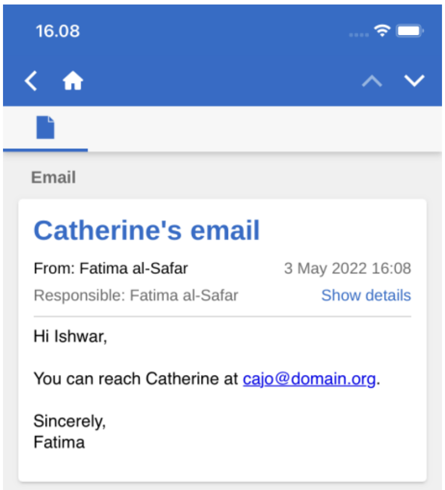


Figure 70: An email address in the record document

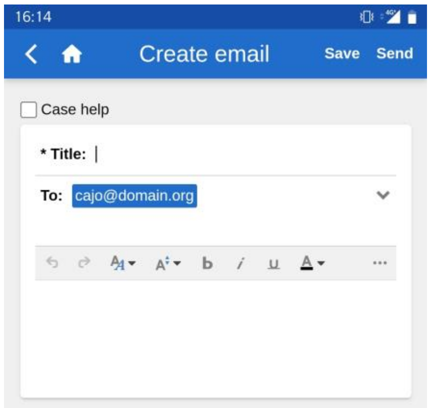


Figure 71: A new email record with the email address as recipient

Creating chats, notes and annotations

Tap the **add icon** + in the record window to add a chat, note, request, or annotation. Requests are described in the *F2 Request* section, while the other communication options are described below.

Create new chat

Tap the **add icon** and select **New chat** to open the chat window. Selecting **Chat all** adds all email related participants to a new chat, i.e. sender, recipient(s), and any Cc and Xbc recipients.

The figure below provides an overview of the functions available in a newly created chat. The functions are described in further detail below.

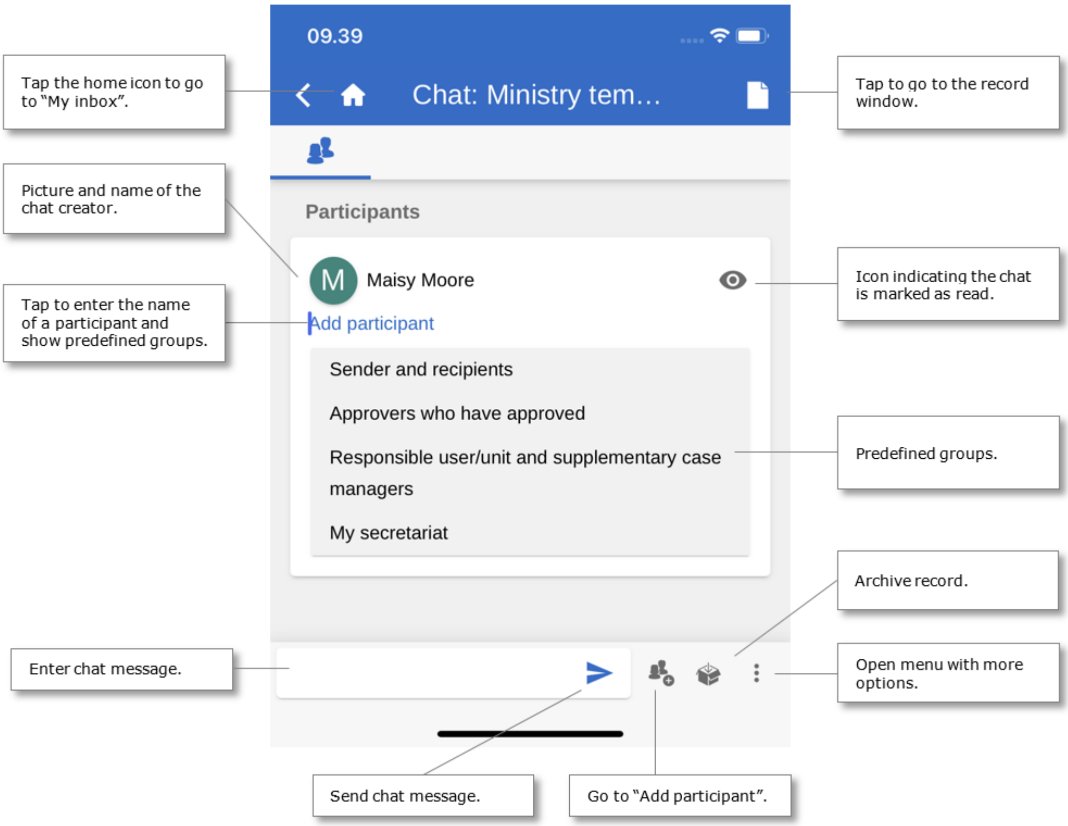


Figure 72: Newly created chat

Tap the **Add participant** field in the chat window to enter the name of a chat participant. Just as in F2 Desktop, F2 Touch suggests participants from the participant register matching the entered name.

Tapping **Add participant** also displays a drop-down menu containing a number of predefined chat groups. Tap a group to add its users to the chat. The predefined chat groups contain users who are involved on the record in different ways. The chat groups are as follows:

- "Senders and recipients" (corresponds to the "Chat all" function).
- "Approvers who have approved" (requires the F2 Approval add-on module).
- "Responsible user/unit and supplementary case managers".
- "My secretariat" (requires the F2 Gateway Approvals add-on module).

Tap a group's name to add its users.

Enter a chat message in the text field in the bottom grey ribbon. Tap the **send icon** to send the message.

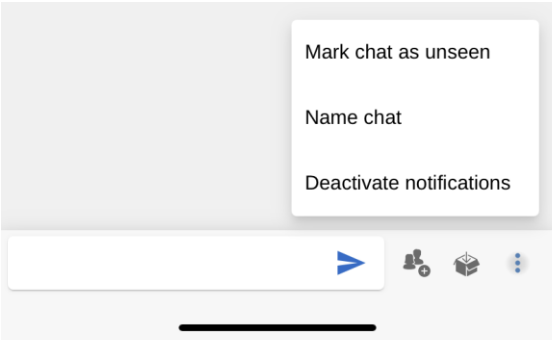


Figure 73: The chat window's bottom grey ribbon and menu

The bottom grey ribbon also contains the three following functions:

- Add participants to chat.
- Archive record.
- Menu.

The menu offers the following options:

- Mark chat as unseen
- Name chat / Edit chat title
- Toggle notifications
- Toggle automatic deletion (if configured)

Read more about chat functions and available configurations in *F2 Desktop – Records and Communication*.

Accessing chats

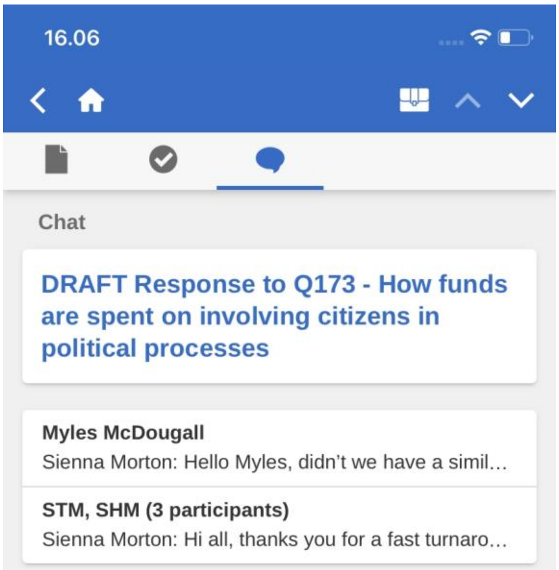


Figure 74: Chat overview

Access a chat by navigating to the chat message overview or by tapping the **chat icon** next to a record in the result list.

A little blue dot appears next to a new chat or a chat with new messages.

Chats with more than two participants show the number of participants and their initials in the title.

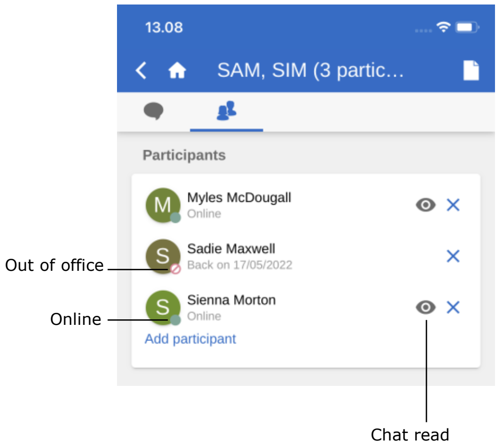


Figure 75: The participants tab found on chats and notes

The participants tab found on both chats and notes shows information about each participant. This includes their picture or initial letter, their status (e.g. "online"), and their out of office information. The participants tab shows an eye icon next to a participant if they have read all messages in the chat.

The chat window shows information about the participants as well.

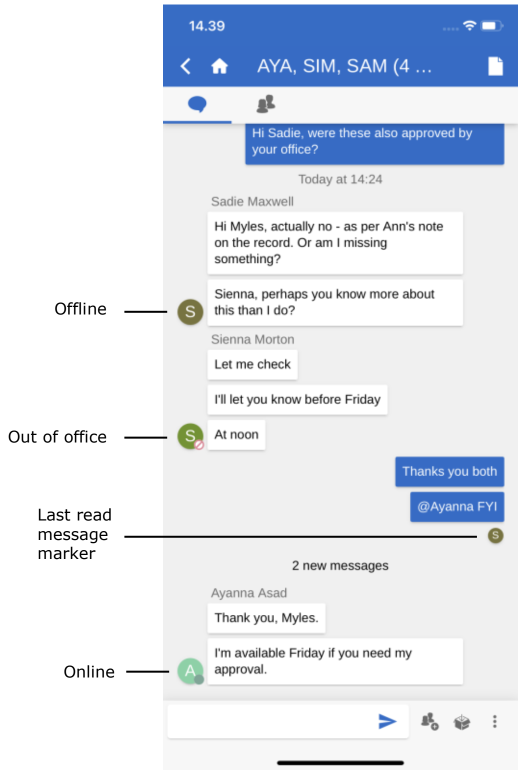


Figure 76: Status and last read message indicated in the chat window

As on the participants tab, a participant is depicted with their picture or initial letter, and their status is shown.

In contrast to the participants tab, the chat window shows exactly how far each participant has read in the chat. Below a participant's last read message, their initial letter or picture appears.

Longer chats may contain more messages than the chat window can show on one screen. Navigate to the first unread message in either direction of a longer chat with **Jump to**. "Jump to" appears regardless of the user's current position in the chat.

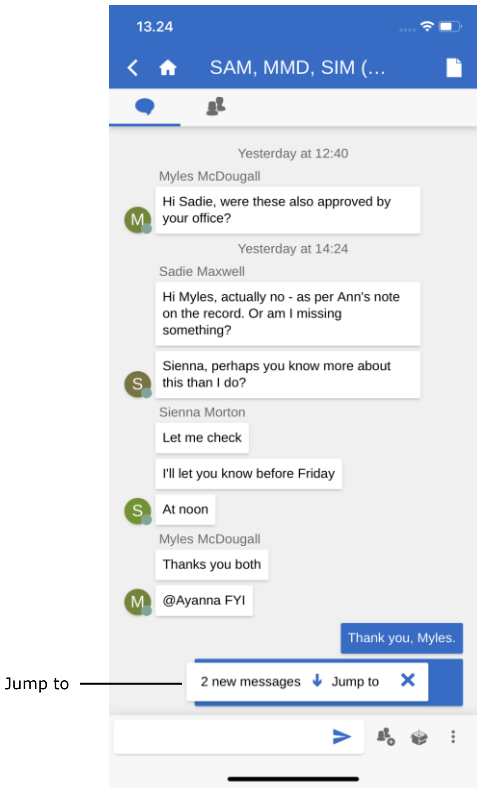


Figure 77: Jump to new messages

Notes

Tap **New note** to add a note to the record and open the note window.

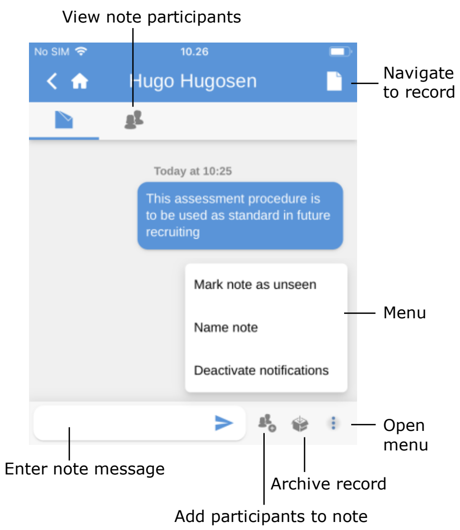


Figure 78: Note

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

The bottom ribbon 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
- Toggle notifications.

Read more about note functions in *F2 Desktop – Records and Communication*.

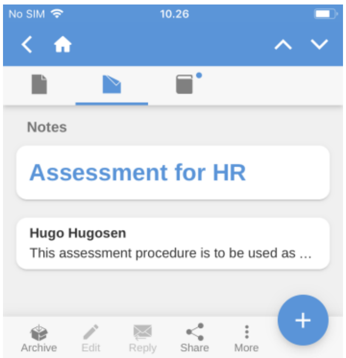


Figure 79: Notes overview

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

If a note is unread or new messages in the note have appeared, a small blue dot appears with the note icon.

Annotations

Tap **New annotation** to create a new annotation and open the annotation window.

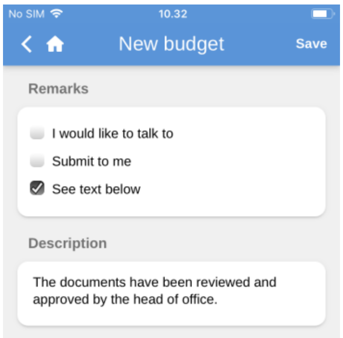


Figure 80: Newly created annotation

Similarly 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.

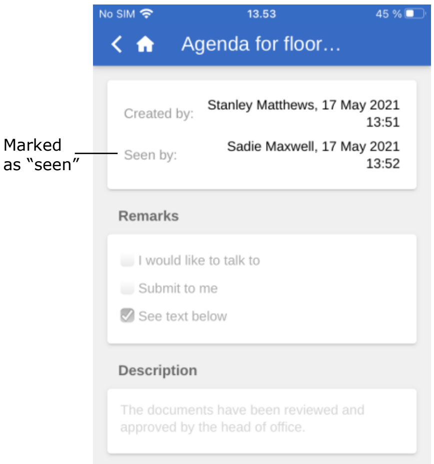


Figure 81: A "Seen" annotation

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 reply using a "3D Touch" or "Haptic Touch" (depending on the device). Both a 3D Touch and a Haptic Touch are performed by placing a finger on the notification for a short while. It is also possible to swipe right and tap on **Show**. This opens the "Archive" and "Reply" shortcuts. The shortcuts are shown 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 unlock the device to send the reply.

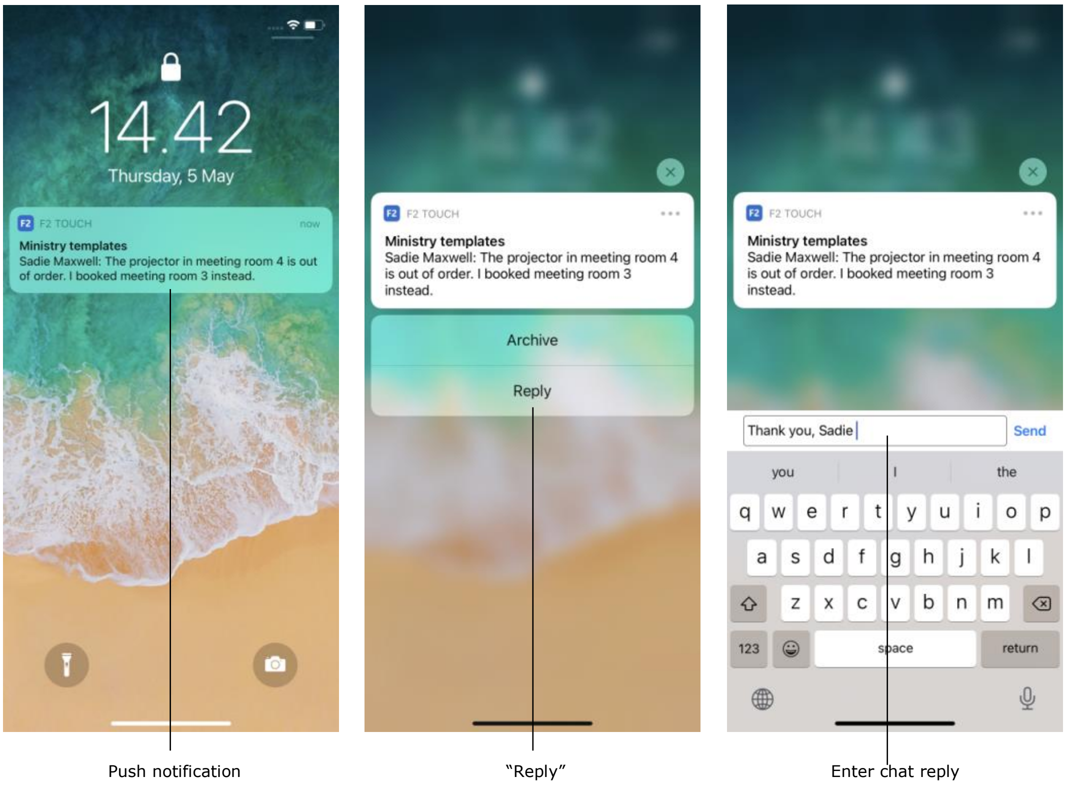


Figure 82: Push notification – Chat

This procedure also applies to receiving and replying to 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**.

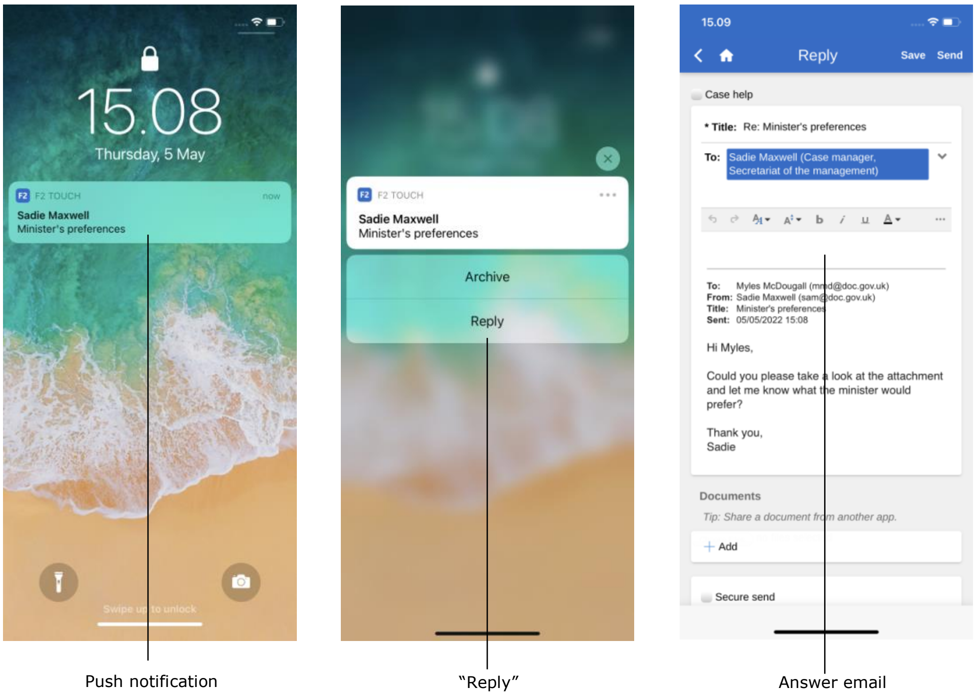


Figure 83: Push notification – Email

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.

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

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

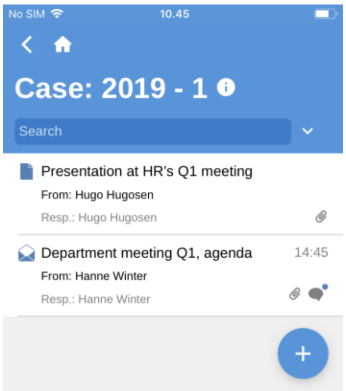


Figure 84: The case record's view

As in F2 Desktop, there are limited options for editing a completed case. This default behaviour can be disabled in cooperation with cBrain. Read more in *F2 Desktop – Cases*.

Attach a new record to a case

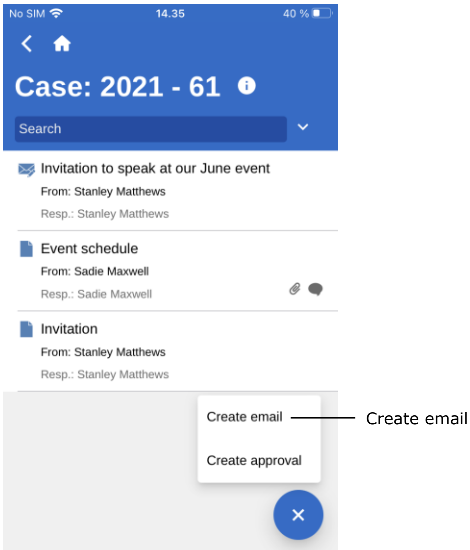


Figure 85: Create new record on a case

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 the **add** icon, and then **Create email**.

Note: The **Create email** function is used for creating both emails and records. If no recipient is added in the "To" field, F2 creates a regular record.

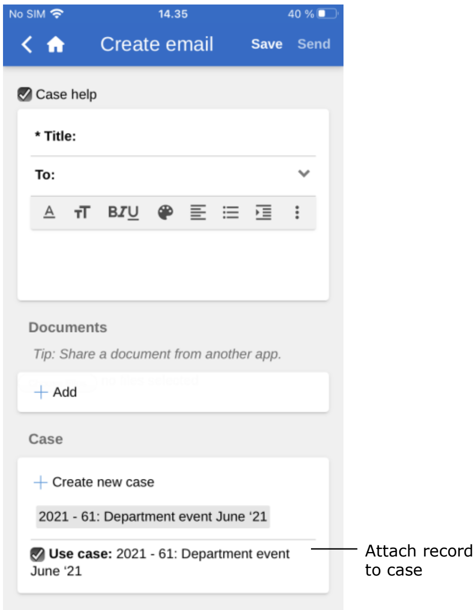


Figure 86: Attach a new record to a case

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.

Attach existing record to case

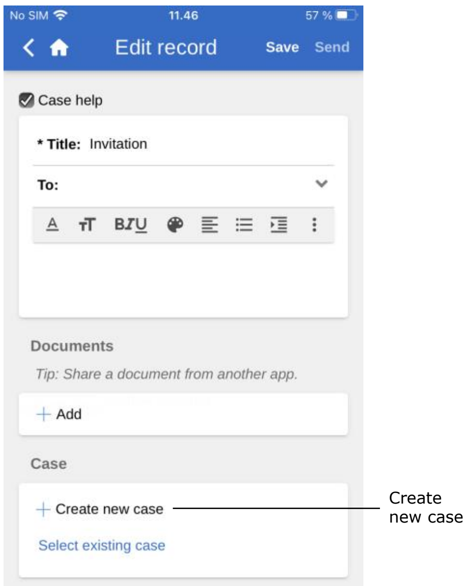


Figure 87: The "Case" field on a record

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.

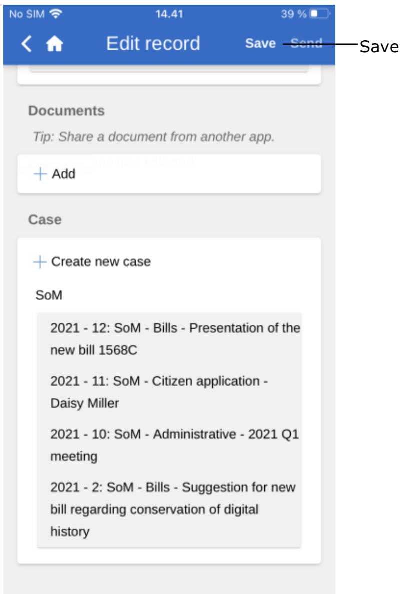


Figure 88: Case search result list

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 then suggests cases that match the entered words, as shown in the figure to the left.

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

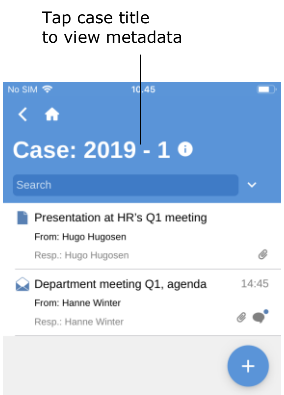


Figure 89: View the case's metadata

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

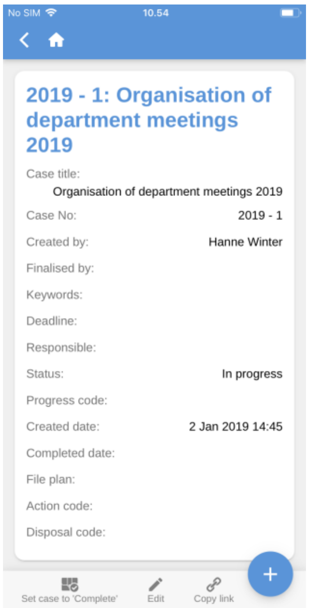


Figure 90: View the case's metadata

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
- Deadline
- The user or unit responsible for the case
- The case's status
- The case's progress code
- The case's file plan, action code and disposal code

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

Edit the case metadata

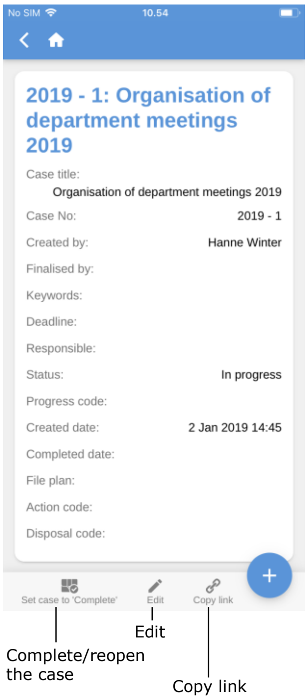


Figure 91: The case metadata

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

Go the case's metadata and tap **Edit** in the bottom grey ribbon. Changes to the metadata are saved by tapping **Save**.

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.

Create new case

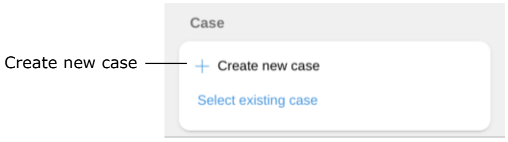


Figure 92: The "Case" field on a record

A new case can be created using a record. This can be done using either 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 icon** + next to "Create new case" in the case field. This opens a number of fields for case creation.

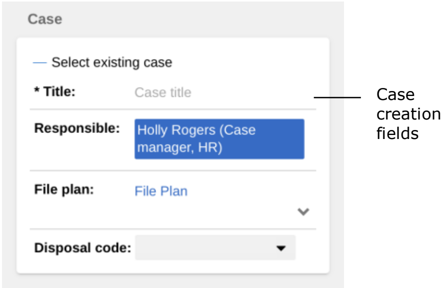


Figure 93: Create a new case

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 in F2 even when offline. 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 when 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, and send records.
- Edit the record’s metadata (update personal and unit control, flag, deadline, registered, and access control).
- Mark records as unread.
- Archive records.
- Delete records.
- 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.

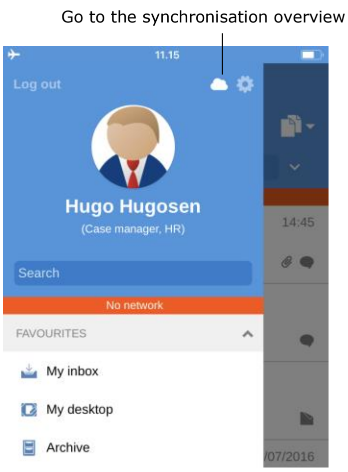


Figure 94: Go to the synchronisation overview

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 the cloud icon above the list view to view the queue.

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

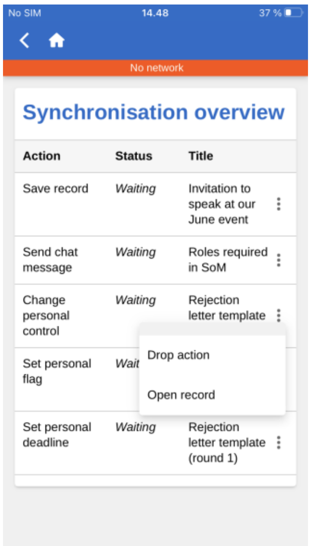


Figure 95: The synchronisation overview showing queued actions

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

If multiple actions have 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 **menu** next to a record to cancel the action or open the record.

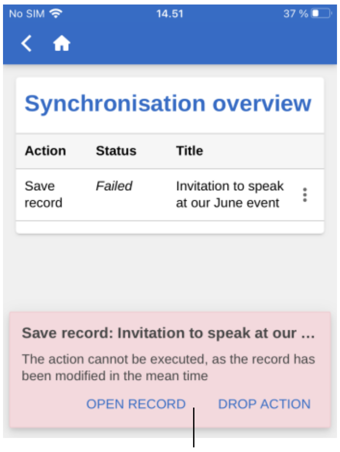


Figure 96: A failed action on a record

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 include:

- **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.

F2 Touch Light

F2 Touch Light is a configuration that provides limited access to data in F2 Touch while connected to an unsecured network. A user can only access and view records in "My Archive".

F2 Touch Light is set up 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 97: Example of list that is not based on a "My archive" search

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 unsecured network.

F2 Touch Light affects use of 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 Request
- 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, 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 internal requests

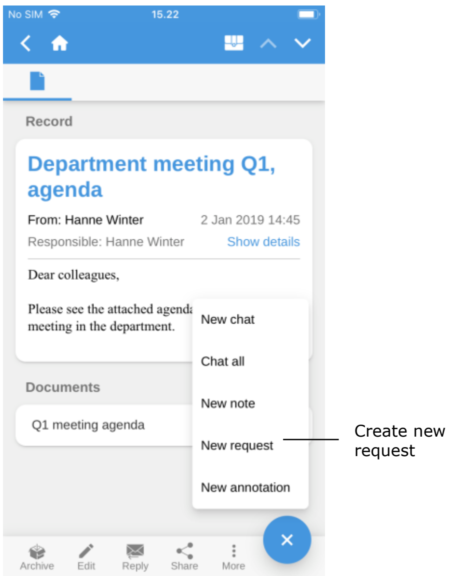


Figure 98: Create new request

A new request is created from a record. Tap the **add icon** and then **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.

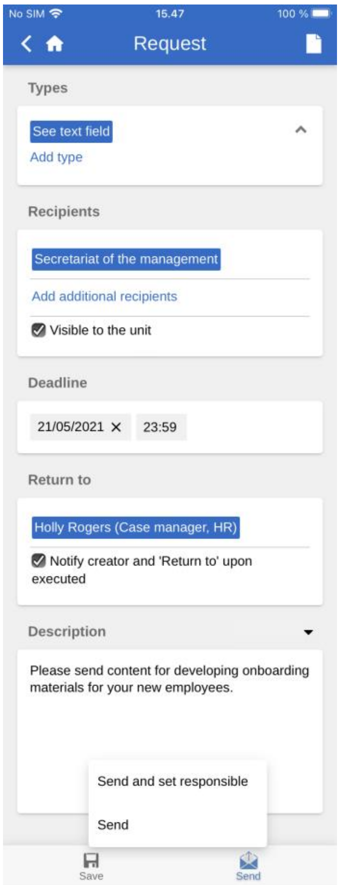


Figure 99: Newly created request

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.

Note: In F2 Touch, the answer record is always attached in a format predetermined in F2 Desktop. This means that the format cannot be changed in F2 Touch.

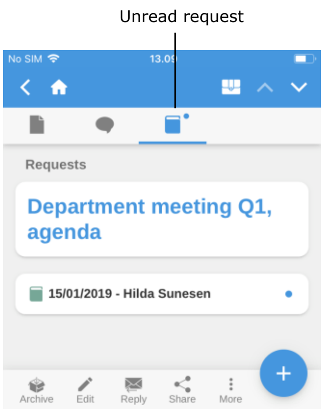


Figure 100: A request on a record

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.

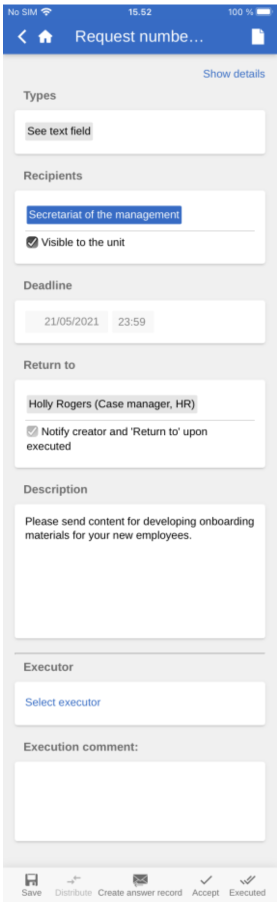


Figure 101: A request

Group requests 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.

External requests 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 external request is still visible on the record under "Requests".

Show request history

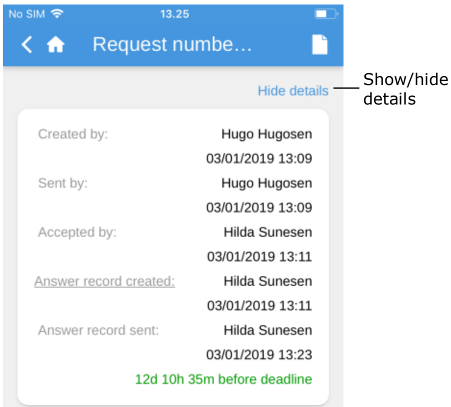


Figure 102: The request history

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 may be the request creator, the user who accepted it, creation time for an answer record, 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 103: A list of records in an approval flow

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

Show approval

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

A user added as an approver can approve or return the approval with or without a comment. If a unit as added as an approver, the unit's users have the same options.

A copy recipient can mark the approval as "seen" and has the options of notifying the responsible user and adding a comment.

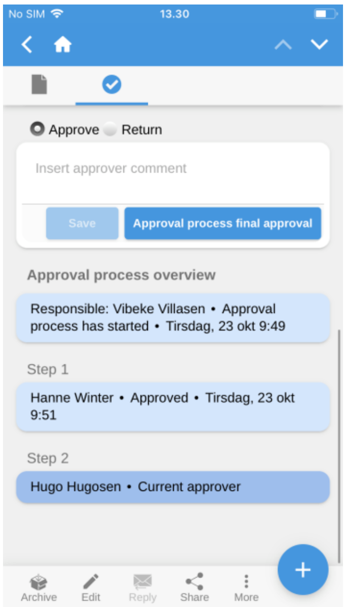


Figure 104: Processing the approval as an approver

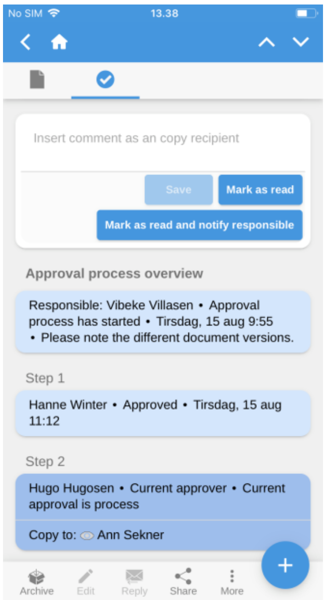


Figure 105: Processing the approval as a copy recipient

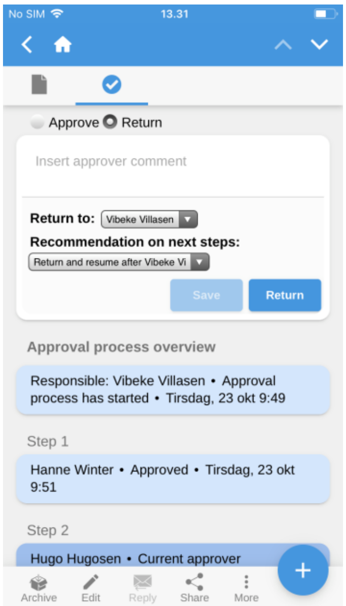


Figure 106: Returning an approval

An approval is returned as in F2 Desktop.

When returning, it is possible to select to which user the approval is returned. It is also possible to recommend with which user the approval should resume.

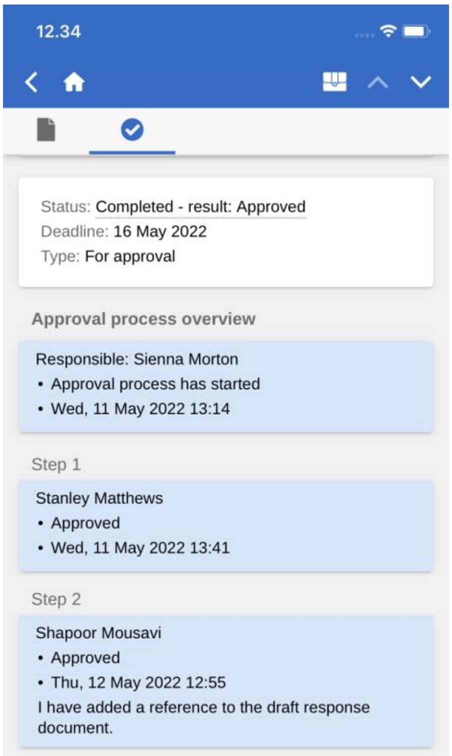


Figure 107: Status and approval process overview

The approval's status and process overview are shown below the approval record. The approval status shows which step the approval is currently on or if it is finally approved. Its deadline and type, if any, is also shown here.

The "Approval process overview" section shows information about each approval step.

An approval can be processed when it is on the step of the following:

- A user or unit who is an approver.
- An approver with "On behalf of" rights.
- A copy recipient.

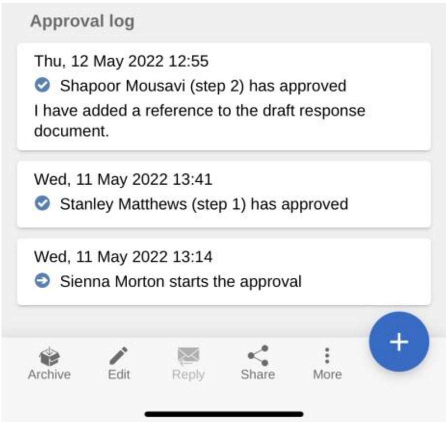


Figure 108: The approval log

The "Approval log" section is found below the "Approval process overview section". The log shows all actions performed in relation to the approval process and any comments related to the actions.

The log is presented in reverse chronological order, so the latest approval action is shown at the top.

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 by default:

- 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.

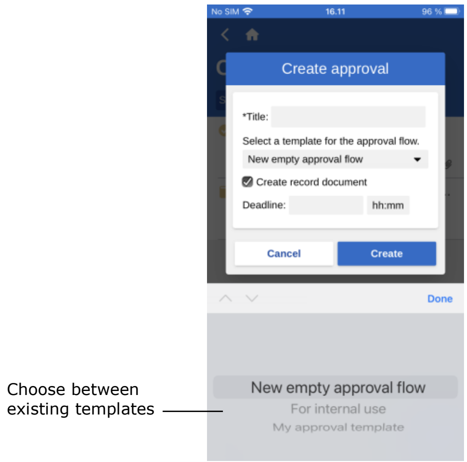


Figure 109: Create a new approval using a template

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 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 toggle the options for editing.

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

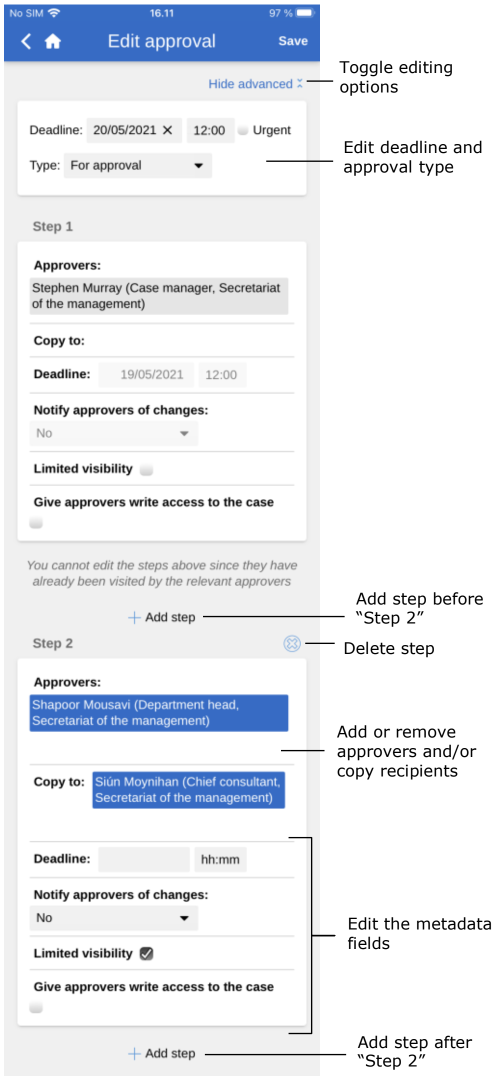


Figure 110: Edit approval

Offline approval actions

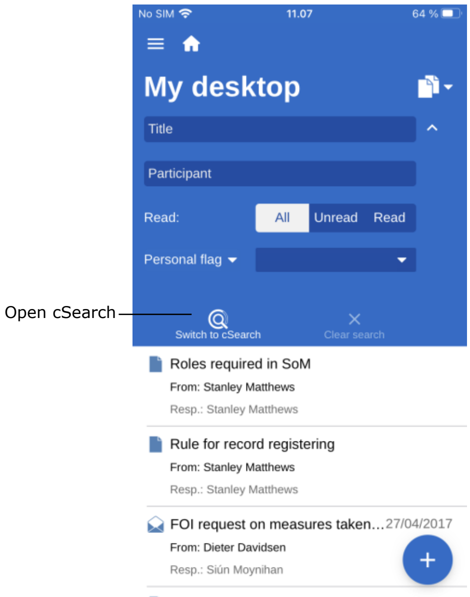
It is possible to perform a number of actions in F2 Approvals when F2 Touch is offline:

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

For more information on these functions, 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 any list. Tap next to the search field above the result list and then **Switch to cSearch** to open cSearch.

Figure 111: Open cSearch

Quick search

Search quickly by entering the search word in the search field. The search will then start automatically.

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

To treat the search text as a completed word, enter a space in the search field after the last letter.

Tapping a result will display the corresponding record.

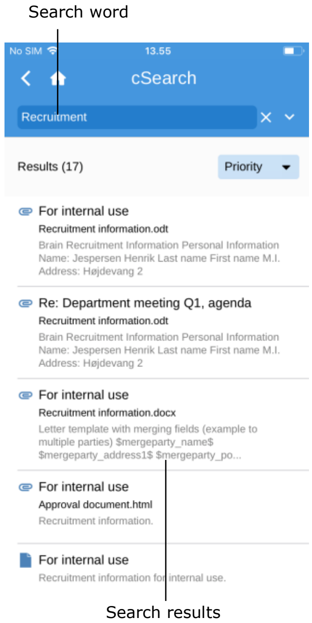


Figure 112: A search using cSearch

Advanced search

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

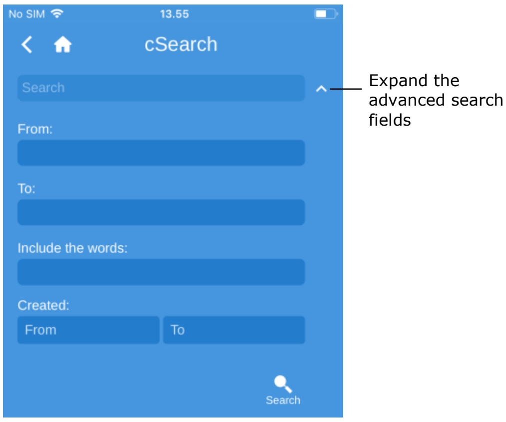


Figure 113: Advanced search

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.

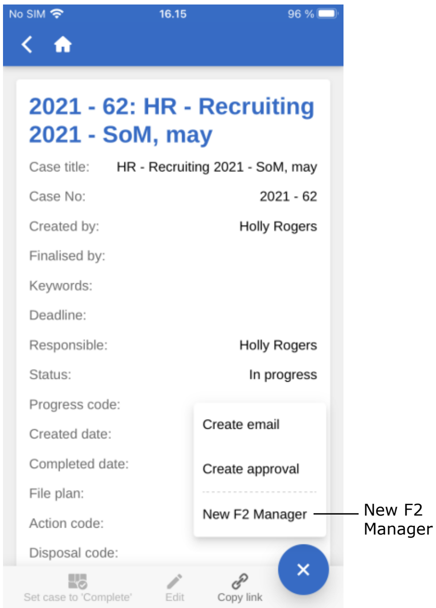


Figure 114: Transfer to F2 Manager

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.

From the case details, tap the **add icon** + and then **New F2 Manager**. If there is already a meeting on the case, the option is called **F2 Manager**.

Tapping **New F2 Manager** opens a synchronisation page for F2 Manager. On this page, relevant information associated with the transfer to F2 Manager can be added. Read more in *Synchronisation with F2 Manager*.

The same procedure is used here as when creating an ad hoc meeting in F2 Desktop. Read more about ad hoc meetings in *F2 Manager – User manual*.

Synchronisation with F2 Manager

The synchronisations screen consists of sections in which the relevant meeting information can be added when a meeting is created from F2 Touch. Each section is described in the following.

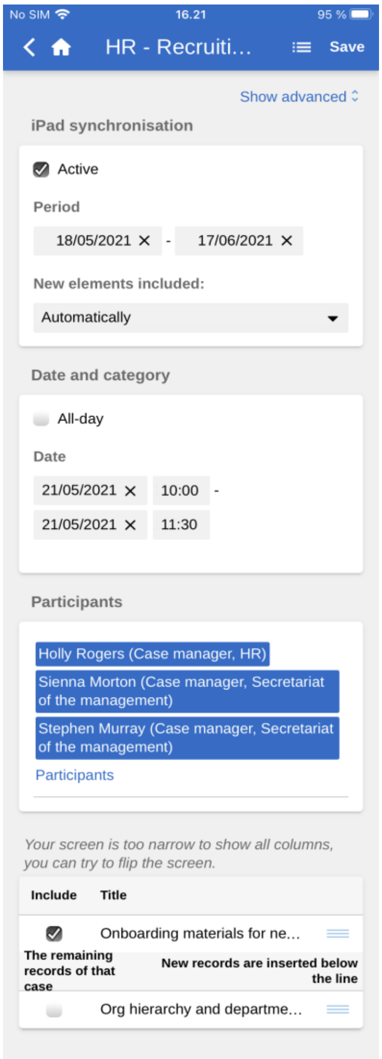


Figure 115: Synchronise to F2 Manager

iPad synchronisation

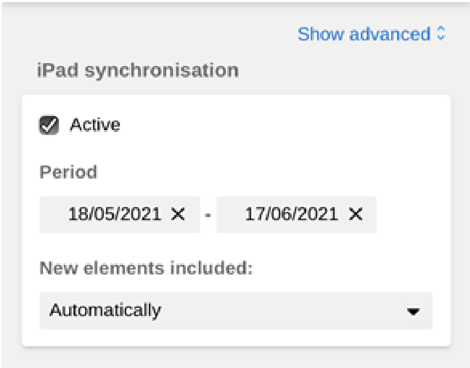


Figure 116: iPad synchronisation

Tick the "Active" box to synchronise the records on the synchronisation list to F2 Manager. Records are synchronised only in the specified period and to the specified participants.

Outside the specified period, the records do not appear on the iPad.

Use the "New elements included" drop-down to choose whether to include new element automatically or manually.

Date and category

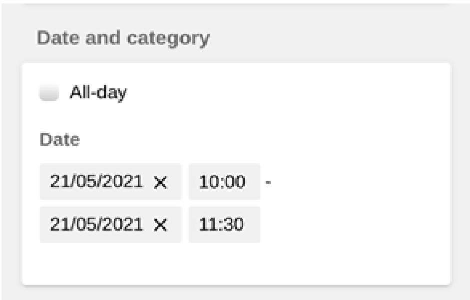


Figure 117: Date and category

Use the fields in the "Date and category" section to specify a meeting date and time. Tick off the "All-day" box if the meeting lasts longer than a day.

Entering a date is required, while entering a time is optional.

Participants

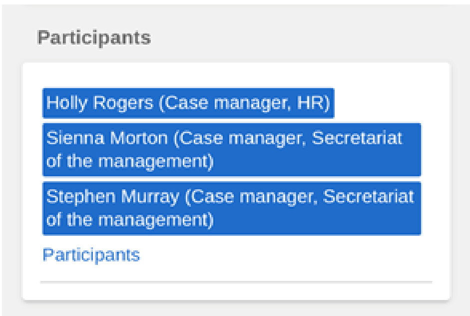


Figure 118: Participants

Use the "Participants" field in the "Participants" section to add meeting participants. These receive:

- The option of evaluating each agenda item up for evaluation.
- Read access to records that serve as the basis of the agenda items.

The synchronisation list

The synchronisation list shows which records are transferred to the iPad when synchronising. Untick a record on the list to exclude it from synchronisation. Unsynchronised records are shown in the list "The remaining records of that case".

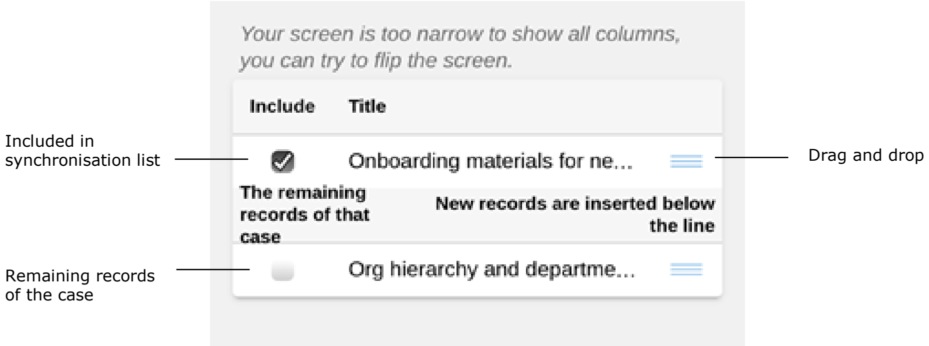


Figure 119: The synchronisation list

It is possible to change the order of the records or move records from one list to another. Press and hold the **drag and drop icon** and drag the record to the desired location.

To show all columns of the synchronisation list, rotate the device. The columns "To be rated" and "Disallow export" are then visible.

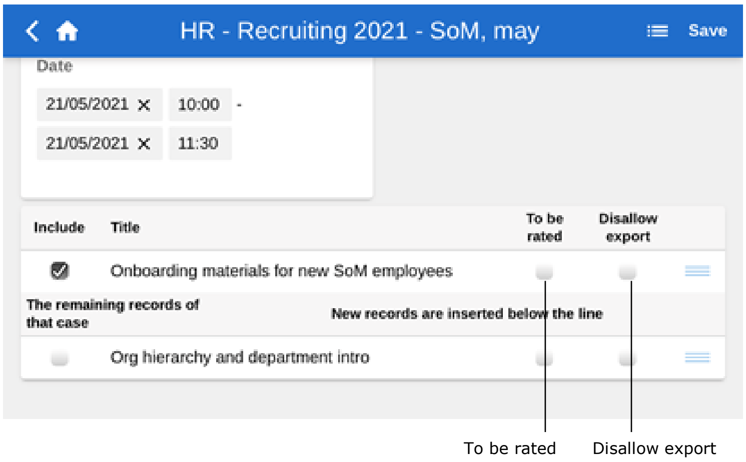


Figure 120: The expanded synchronisation list

Tick the box in the "To be rated" column to let the meeting participants evaluate the agenda item. Advanced options related to evaluation also exist. These are described in the *Show advanced* section.

Tick the box in the "Disallow export" column to prevent the agenda item from being exported from the F2 Manager app. This means that the agenda item and its attachments cannot be shared with other apps on the iPad and cannot be printed.

Show advanced

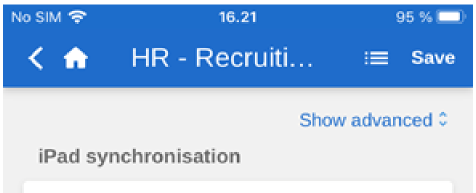


Figure 121: Show advanced

Tap **Show advanced** in the upper right corner of the synchronisation screen to open the advanced F2 Manager synchronisation options.

These are briefly described below. Read more in the *F2 Manager* user manual.

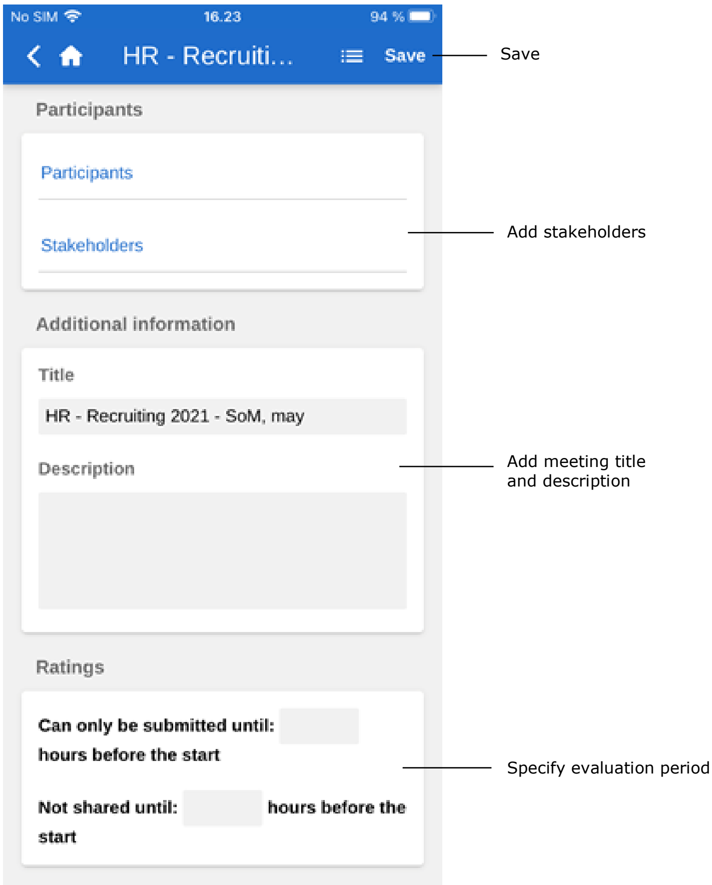


Figure 122: Advanced synchronisation options

The advanced synchronisation options include:

- Add stakeholders to the meeting. Stakeholders cannot evaluate agenda items, but otherwise have the same rights as meeting participants.
- Add meeting title and description, such as meeting place and room.
- "Can only be submitted until" specifies in hours the end time of the period in which meeting participants can submit their evaluation.
- "Not shared until" specifies in hours the start time of the period in which meeting participants can view everyone's evaluations.

Once the relevant information has been entered, tap **Save** in the upper right corner.

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 annotate documents attached to a meeting. This is a quick and easy way to add comments and highlight important sections in the document 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.

The search shows all records annotated by that user and may be saved to allow quick access to future annotations.

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 more information on annotations, 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.

Configurations

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

- Log in to F2 Touch using Touch ID on iOS devices with this functionality available.
- Log in to F2 Touch using Face ID on iOS devices with this functionality available.
- Log in to F2 Touch using “Remember me”.
- Allow the user to select whether the dates and times displayed in F2 Touch depend on the time zone of the server or the device.
- Set up the users’ options for creating, starting, and editing approvals (add-on module), including whether the approval is created without a record document attached.
- When an answer record to a request (add-on module) is created in F2 Touch it is automatically attached to the request record depending on the organisation’s setup. The format is configured in F2 Desktop.

List of figures