



## 30 A System Administrator's guide to using System Configuration

System Configuration enables system administrators to add icons, contact and reference types.

### How to use System Configuration

Simply follow the steps below

1. Go to the Administration function.
2. Expand the Configure System folder.
3. Select from the three options available: Attribute icon, Contact types, Reference types.

#### Attribute Icons

To add an attribute icon:

1. Click on the Add button.
2. Input the icon name.
3. Click on the Browse button to search for and select the required icon.
4. When you have completed the relevant information click on the Save and Close button.

You will then be able to find the attribute icon in the Administration function/Configure system/Attribute icons folder, where you can view, amend or delete it.

Attribute icons, such as an organisation's business card, can be used when setting up an individual's support team, as shown below.

The screenshot shows the profile page for Peter Lorimer. The 'Support team' tab is active, displaying a table of support team members. The table has columns for Action, Name, Relationship, Organisation, System role, and Attribute icons.

Action	Name	Relationship	Organisation	System role	Attribute icons
	Im Another Budget Manager	Personal budget manager	Thera Test Org (SP+BM)	Personal budget manager	
	Thera Org Admin	Brother	Thera Test Org (SP+BM)	Support Team	

## Contact types

To add a contact type:

1. Click on the Add button.
2. Type the contact details.
3. When you have completed the relevant information click on the Save and Close button.

You will then be able to find the contact type in the Administration function/Configure system/Contact types folder where you can view, amend or delete it.

Please note, fields marked with an asterisk (\*) are mandatory.

Contact types can be added to an individual's Personal details profile, as shown below.

The screenshot shows the 'Johnny Giles' profile page. On the left is a navigation menu with 'Personal details' selected. The main content area is divided into sections: 'Address details' with input fields for Postcode, Street, Town, and County, and a 'Find address' button; 'Address line' with pre-filled details: 1 Birkrig, Skelmersdale, Lancashire, WN8 9HL; and 'Contact details' which is a table with two rows of contact information. The table has columns for Action, Contact type, Contact details, and Format. Below the table is an 'Add contact' button.

Action	Contact type	Contact details	Format
<input checked="" type="radio"/>	Skype	Right Price	Ian Price
<input type="radio"/>	Home telephone	01695 147 4789	0177 201 2345

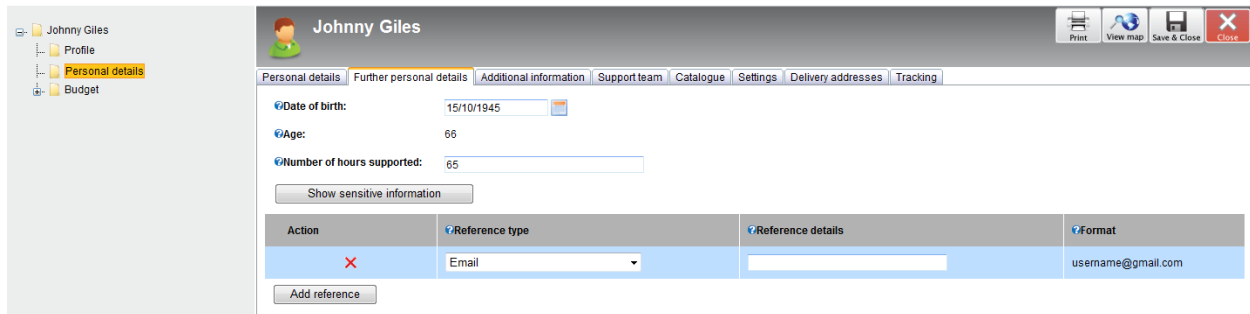
## Reference types

To add a reference type:


1. Click on the Add button.
2. Input the contact details.
3. When you have completed the relevant information click on the Save and Close button.

You will then be able to find the reference type in the Administration function/Configure system/Reference types sub folder where you can view, amend or delete it.

Reference types such as a membership number or any custom information can be added to the individual's further personal details, as shown below.



The screenshot shows the profile page for Johnny Giles. The left sidebar contains a tree view with 'Personal details' selected. The main content area has tabs for 'Personal details', 'Further personal details', 'Additional information', 'Support team', 'Catalogue', 'Settings', 'Delivery addresses', and 'Tracking'. The 'Personal details' tab is active, showing fields for 'Date of birth' (15/10/1945), 'Age' (66), and 'Number of hours supported' (65). Below these fields is a 'Show sensitive information' button. A table below the form lists reference types:

Action	Reference type	Reference details	Format
	Email		username@gmail.com

An 'Add reference' button is located below the table.