System configuration

Configure contacts

Define contact lookup lists; e.g. organisation types, phone types, position roles.

Configure forms

Design and management of smart forms, and how to map smart forms for use.

Configure documents

Define information necessary to manage the documents stored against Applications and Projects.

Configure email and document templates

With Templates management, you can create and maintain letters and emails generated by the system (e.g. application submission confirmation, forgotten password, notification of application outcome, funding agreement etc.). Available in System Settings >> Templates.

Configure applications

Configure application content and behaviour

Configure projects

Configure project content and behaviour

Configure external reviews, panels, and meetings

How to configure External Reviews, Panels, and Meetings including definition of types, management defaults, and behaviour.

Configure background tasks

Background tasks run behind-the-scenes to automatically perform such functions as generate email reminders, populate the milestone slippage report, and distribute emails. You can set the recurrence using a variety of options including daily, weekly, monthly and yearly.

Configuration requiring Administrator access

Perform configuration tasks that require technical skills or restricted access.

Configure the External Portal

Configure presentation of the External Portal.

External Portal Management

System Lookups

Configurability questions

Related topics