Viewing/Editing a Resource Introduction

Wed, Jan 17, 2024 Viewing/Editing a Resource

It is possible that information concerning Resources may need to be viewed or edited and this can be done simply by clicking the "Resource List" button. Once clicked, the Resource List is displayed. From here, it is possible to view/edit a Resource by double clicking an item or selecting an item and clicking the "Next" button. The User can also filter down the list using the smart filters to make finding the correct Resource easier.

To view/edit a Resource click the links below.

Note: If a Resource ever needs deactivating then locate the Resource in the Resource List, right-click it and select "Deactivate Item...". This will then display the Deactivation Reason screen. Enter a reason here and click "OK" to deactivate the Resource.
If the User needs to put a Resource 'On Hold' for any reason (this will automatically force all invoices from this Resource to be 'Unapproved' with an Unapproved Reason of 'Contractor Account On Hold'), then right-clicking the resource in the list and selecting 'On-Hold' will turn the text colour of the Resource in the list red, indicating they are on hold. To remove the On Hold status, right-click again and choose 'Off-Hold'.

External Resources

Internal Resources

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=133