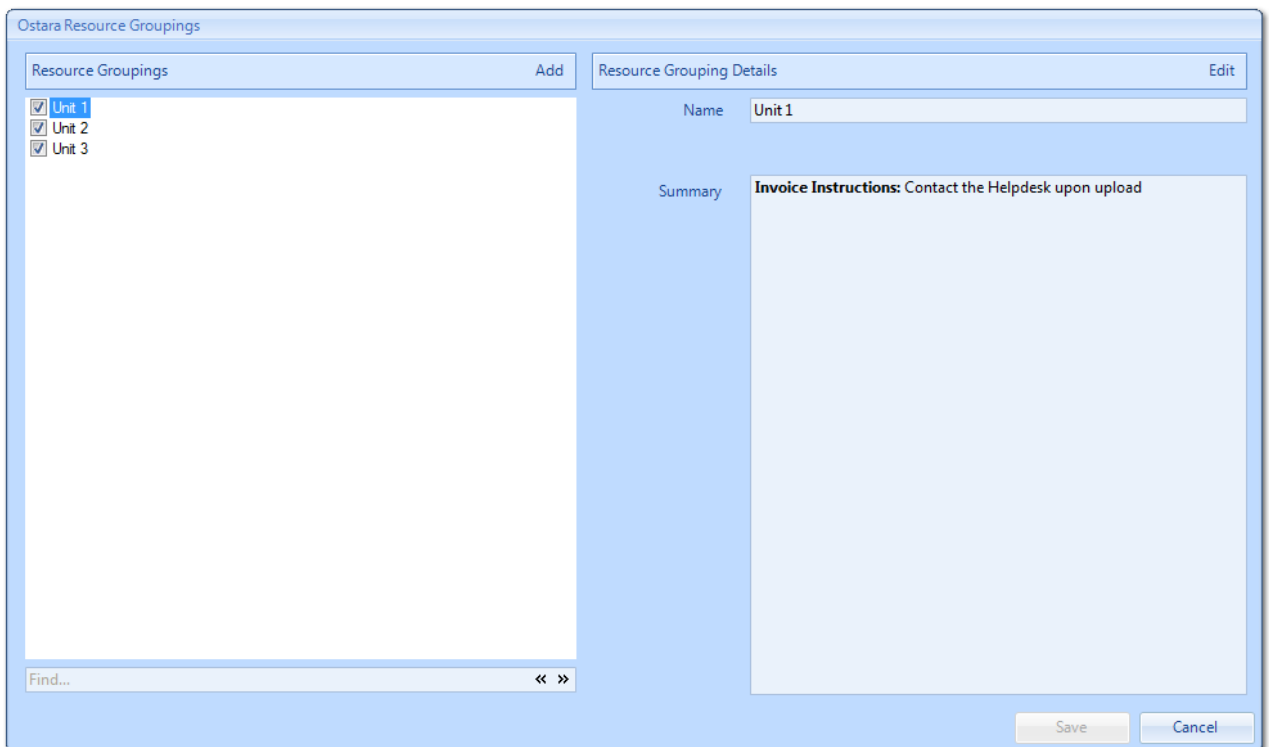


Resource Groupings

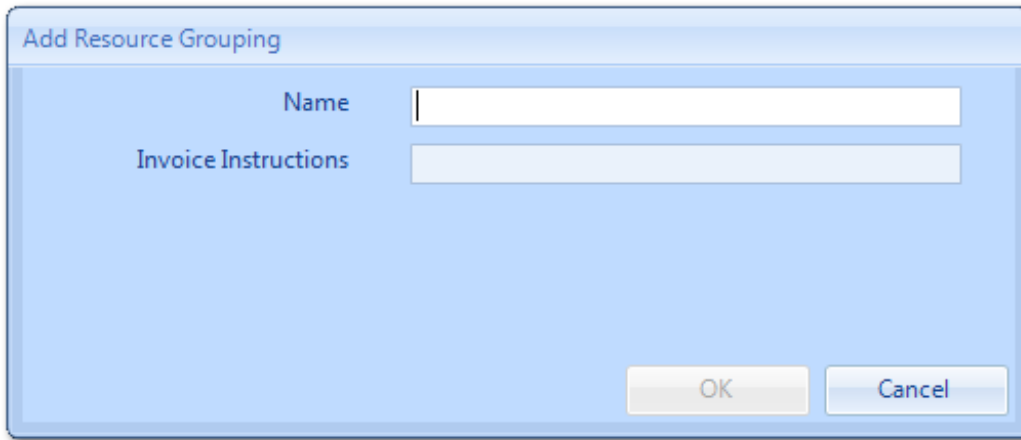
Wed, Jan 17, 2024 [Resource](#)

"Resource Groupings" are used to restrict what financial information a User can view for the Resources under those specific groupings. These are a good means of restricting Users to only allow them to view specific details of Resources. The Resource Groupings screen allows Users to create, edit or delete these Resource Groupings. To view "Resource Groupings", click the "Resource Groupings" button.

1. This is the Resource Groupings screen. Here, the desired Resource Groupings can be ticked and un-ticked depending on which types need to be available throughout the system. As with many other parts of the application, it's possible to add items and edit items within the list using the "Add" and "Edit" buttons.

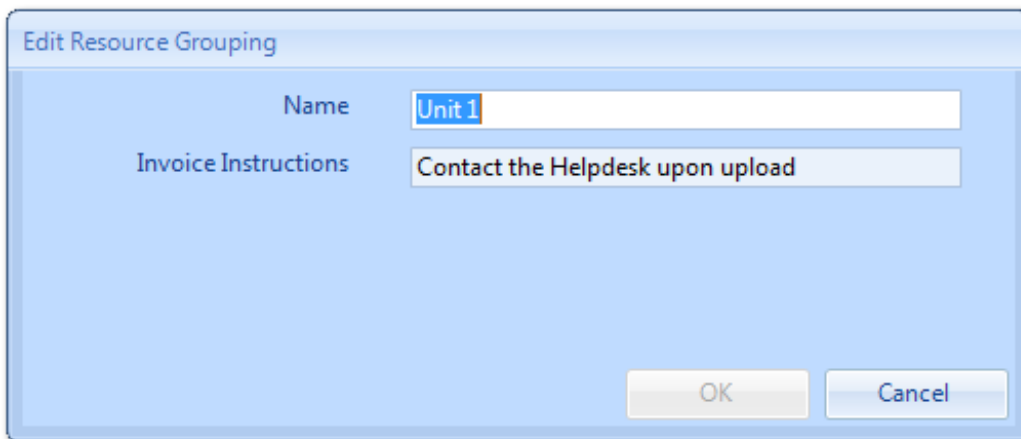


2. Click "Add" to display the Add Resource Grouping window. In this window, enter the Name of the new Resource Grouping and any Invoice Instructions related to this grouping. Invoice Instructions appear once an invoice is uploaded are used to convey to the Resource what they need to do after the Invoice has been uploaded. Once the details have been entered, click "OK" to add the Resource Grouping.



The image shows a dialog box titled "Add Resource Grouping". It has a light blue background and a white border. At the top, the title "Add Resource Grouping" is displayed in a blue font. Below the title, there are two input fields. The first is labeled "Name" and is currently empty. The second is labeled "Invoice Instructions" and is also empty. At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

3. Click "Edit" to display the Edit Resource Grouping window. In this window, the Name and the Invoice Instructions of the selected Resource Grouping can be modified. Click "OK" to apply the changes.



The image shows a dialog box titled "Edit Resource Grouping". It has a light blue background and a white border. At the top, the title "Edit Resource Grouping" is displayed in a blue font. Below the title, there are two input fields. The first is labeled "Name" and contains the text "Unit 1". The second is labeled "Invoice Instructions" and contains the text "Contact the Helpdesk upon upload". At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

4. Once all the changes have been made, click "Save" to apply them.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=68>