

# Riverside Score Quick Guide

## Add and Manage Locations

### To open the Locations page:

On the menu, click **Staff Management** and select **Locations**. The page opens on the Hierarchy tab.

There are two tabs on the Locations page:

- **Hierarchy** – Set up the levels of your organization, such as district, school, and classroom.
- **Organization** – Add the actual locations to the appropriate level. For example, East and West districts and City Park and Webb schools.

### Hierarchy

On the Hierarchy tab, you maintain the three sub levels that are available under the root level that is assigned when you receive the BDI-3 platform. Name the sub levels to suit your organization.

**Note:** The root level name is assigned by Riverside Insights. Contact customer support if you want it changed.

### To change a sub level name:

- 1 Click in a sub level field and type over the name.
- 2 Click **Save**. The Changes Saved message appears.
- 3 Close the message. The new name for the sub level is set.

### To deactivate a sublevel

**Note:** When you deactivate a sub level, the locations assigned to that sub-level are not deleted. They are moved up to the next higher level.

- 1 Click the **ON** switch beside the sub level you want to deactivate. The switch toggles to **OFF**. The Remove Hierarchy Level message appears.

**Note:** If you click any sub level with levels below it, the lower levels will also be deactivated.

- 2 Click **Cancel** to exit or **Continue** to continue. If you click **Continue** the Delete Hierarchy Level page opens.
- 3 Click one of the two:

- **Delete all organizations below this level.** The sub level will be deactivated. Locations and child records will be rolled up to the sub level above.
- **Reassign all organizations below this level.** Select the location to which you want the levels to be moved on the Select a new location drop-down list.

- 4 Click the **Continue**. The Confirm Delete Organization Data or Confirm Reassign Organization Data box appears.
- 5 Type your BDI-3 password and click **Delete** or **Reassign**.
- 6 Click **Save**. The Save message appears.
- 7 Close the Save message. The sub levels are deactivated.

**Confirm Delete Organization Data**

You have selected to delete the selected hierarchy level and ALL organization data associated with it. Student data will persist at the hierarchy level above. Staff that are located at only the deleted hierarchy level will be made inactive.

Type your password in the text box below and click **Delete** to remove the level from your organization. Click **Cancel** to return to the Manage Organization page without deleting the selected level.

LOGIN PASSWORD

Please enter your password to confirm

## Locations

On the Organization tab of the Locations page, you can add, edit, move, and delete locations.

The screenshot shows the 'Organization' tab with a table of locations. The table has columns for Name, Hierarchy Level, and Actions. The locations listed are Steve Pike Organization (Root), East (District), Senn School (School), and West (District). Each row has a checkbox and a set of action icons (edit, delete, move, add).

Name	Hierarchy Level	Actions
<input type="checkbox"/> Steve Pike Organization ^	Root	+ (Add)
<input type="checkbox"/> East ^	District	✎ (Edit), 🗑️ (Delete), ➡️ (Move), + (Add)
<input type="checkbox"/> Senn School v	School	✎ (Edit), 🗑️ (Delete), ➡️ (Move), + (Add)
<input type="checkbox"/> West v	District	✎ (Edit), 🗑️ (Delete), ➡️ (Move), + (Add)

Buttons: Add Location, Enter a Location Name (with search icon), Delete

### To add a location:

There are two ways to add a location to a parent location:

- 1 In the **Parent Location** field, select the location to which you want to add the location as a sub level location.
- 2 In the **Name** field, type the location name.
- 3 Click **Add Location**. The location is added.

PARENT LOCATION\*  NAME\*

- 1 Click the Add icon **+** on the row of the parent location. The Add Location box opens. In the **Parent Location** field, the location on the row you selected appears. You can select another one.
- 2 Type the name in the Name field.
- 3 Click **Save** to save the new location or **Cancel** to exit without saving. The location is added.

**Add Location** \* = Required Fields

To add a location, select a parent location from the list of options in the drop-down list and type a location name into the name field.


Click **Save** to save your changes or **Cancel** to stop adding the location and exit without making changes.

PARENT LOCATION\*  NAME\*

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### To find a location:

- 1 Enter search criteria in the **Find a Location Name** box.
- 2 Click the Search icon . The location is highlighted in the list of locations.


### To edit (rename or move) a location:

- 1 On the row of the location you want to edit, click the Edit icon . The Edit Location box opens.
- 2 Do one or both of the following:
  - To move the location, select a location from the **Parent Location** list.
  - To rename the location, type the name in the **Name** field.
- 3 Click **Save**. The changes are saved.

**Edit Location** \* = Required Fields


To edit identifying information about this location, type changes in the text boxes and/or select from the list of options in the drop-down list.

Click **Save** to save your changes or **Cancel** to stop editing the location and exit without making changes.

PARENT LOCATION*	NAME*
Steve Pike Organization 	East

### To delete locations:

You can delete one or more locations. The child records in those locations will be moved to the location in the next higher sub level.

- 1 Navigate to the location(s) you want to delete. You can delete one or multiple locations.
  - To delete one location, click the Delete icon  on the row of the location you want to delete.
  - To delete multiple locations, select the locations in the Name column checkbox and click **Delete** at the lower left of the screen.

The Delete Location box appears. The locations to be deleted are noted.

**Delete Location**

Are you sure you want to delete the following location(s)?

Click **Confirm** to delete the location from your organization or **Cancel** to edit without making changes. Any child data associated with this organization will be rolled up to the sub-level above the deleted Location. Staff that are located at only the deleted levels will be made inactive.

Location(s): East

- 4 Click **Confirm** to delete or **Cancel** to exit without deleting. The location is deleted.