Riverside Score Quick Guide
Add and Manage Staff

This guide takes you through the steps for adding, editing, deactivating, and importing staff. Account holders or staff members with staff privileges can add and manage staff.

To add a staff member:

1 On the menu, click **Staff Administration** and select **Add Staff**. The Add Staff page opens.

2 Complete the fields under **Staff Information**.

- **First Name** – Type the first name.
- **Last Name** – Type the last name.
- **Email** – Type the email. An email will be sent to the user with a link to open the Change Password page.
- **Locations** – Select one or more locations from the drop-down list. The user will be able to carry out the permissions below at the locations added here.

3 In the **Permissions** section, complete the permissions.

- **Child Editing** – Allow to add, edit, and delete child records.
- **Data Export** – Allow to export data using the Export Data function in the Report Center.
- **Manage Staff** – Allow to add, edit, and delete staff records.
- **Manage Allocations** – Allow to manage allocations at assigned locations.
- **Manage Locations** – Allow to add, edit, and delete locations for assigned locations.

4 Click **Save** or **Save & Add Another**.

- If you click **Save**, a User Created message appears. Close the message.
- If you click **Save & Add Another**, you return to a blank Add Staff page.

To search and edit a staff member:

1 On the menu, click **Staff Administration** and select **Search/Edit Staff**. The Search/Edit Staff page opens.

2 Type the search criteria in the fields.

Note: To find only inactive staff, click the **Search inactive staff** checkbox.

3 Click **Search**. The search results are listed.

4 Click the edit icon in the **Actions** column. The Edit Staff page opens.

5 Make changes to the information and permissions.
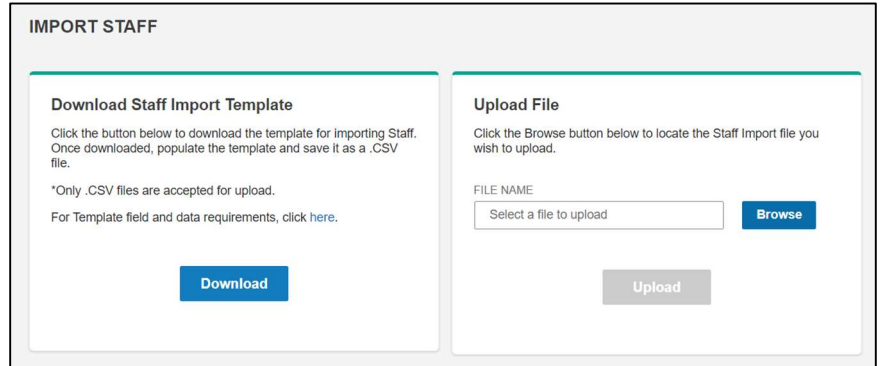
6 Click **Save**.

In BDI-3, you can import staff on an Excel spreadsheet.

To import staff:

1 On the menu, click **Staff Administration** and select **Import Staff**. The Import Staff page opens.

Note: When you have saved the template once, you can skip to step 8 and upload the file.

2 Click the **here** link above the **Download** button to open a document with data requirements. You can use it as reference when filling in the data.

IMPORT STAFF

Download Staff Import Template
Click the button below to download the template for importing Staff. Once downloaded, populate the template and save it as a .CSV file.

*Only .CSV files are accepted for upload.

For Template field and data requirements, click here.

Download

Upload File
Click the Browse button below to locate the Staff Import file you wish to upload.

FILE NAME
Select a file to upload   **Browse**

Upload

3 Click **Download** to download the template.

4 In the lower left of the screen, click **Open** to open the downloaded Excel spreadsheet.

Open
Always open files of this type
Show in folder
Cancel

BDI-3_Import_Staff....csv
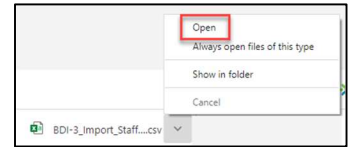
5 (Optional) Save the document with a name and location where you can access it to upload it.

6 Complete the information on the Excel spreadsheet following the formatting instructions on the document you opened in step 2.
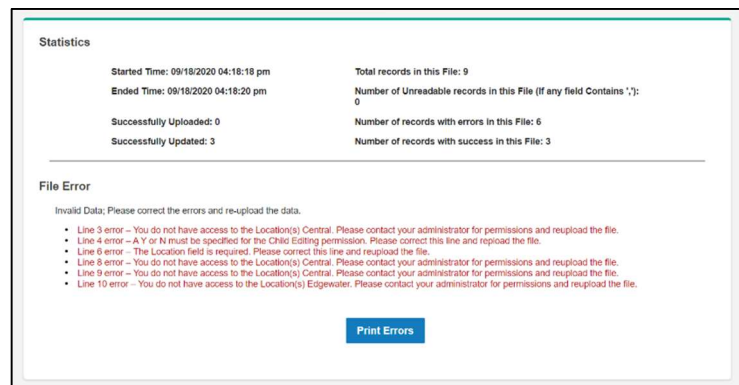
7 Save the Excel spreadsheet.

8 Click **Browse**.

9 Locate and open the completed spreadsheet. The file appears in the **File Name** field.

10 Click **Upload**. Statistics appear at the bottom of the screen, showing the number of records uploaded and errors that kept records from being uploaded.

Statistics

Started Time: 09/18/2020 04:18:18 pm   Total records in this File: 9
Ended Time: 09/18/2020 04:18:20 pm   Number of Unreadable records in this File (If any field Contains ','): 0

Successfully Uploaded: 0   Number of records with errors in this File: 6
Successfully Updated: 3   Number of records with success in this File: 3

File Error

Invalid Data; Please correct the errors and re-upload the data.

• Line 3 error – You do not have access to the Location(s) Central. Please contact your administrator for permissions and reupload the file.
• Line 4 error – A Y or N must be specified for the Child Editing permission. Please correct this line and repload the file.
• Line 6 error – The Location field is required. Please correct this line and reupload the file.
• Line 8 error – You do not have access to the Location(s) Central. Please contact your administrator for permissions and reupload the file.
• Line 9 error – You do not have access to the Location(s) Central. Please contact your administrator for permissions and reupload the file.
• Line 10 error – You do not have access to the Location(s) Edgewater. Please contact your administrator for permissions and reupload the file.

Print Errors

Note: You can click **Print Errors** to open a document that lists the errors. You can save the document as a PDF file.

11 Correct any errors and repeat steps 8 – 10.