


# Quick Guide

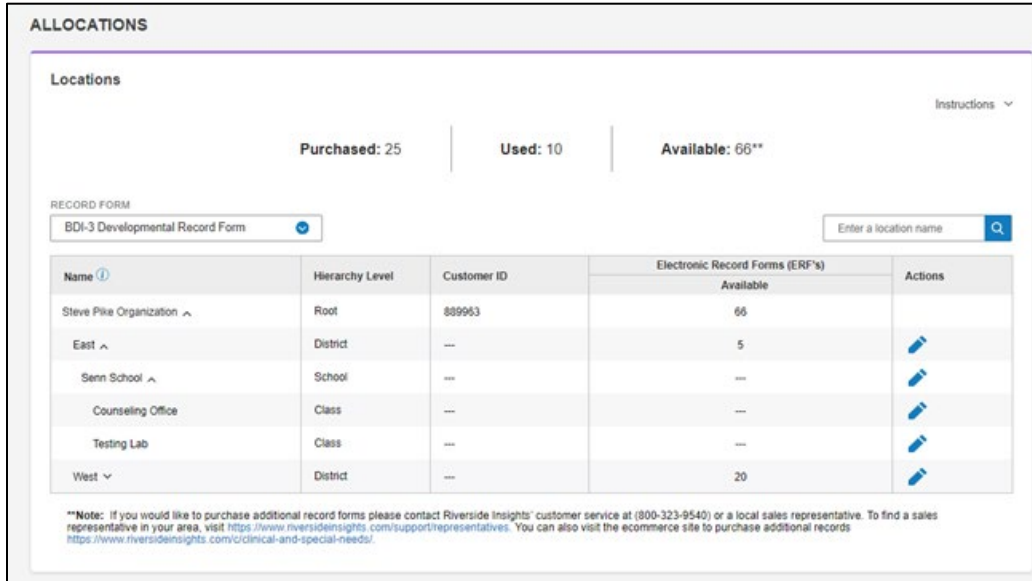
## Manage Allocations

The account holder and other staff members that have allocation privileges can allocate record form licenses to locations in the organization.






### To open the Allocations page:

There are two ways to open the Allocations page:

- Click **Organization Management** on the menu and select **Allocations**.
- On the Organization tab of the Locations page, click the Allocations icon  on the row for which you want to make allocations.




The screenshot shows the 'ALLOCATIONS' page with a summary of record form status: Purchased: 25, Used: 10, Available: 66\*\*. Below this is a dropdown for 'RECORD FORM' set to 'BDI-3 Developmental Record Form' and a search bar for 'Enter a location name'. The main table lists locations with columns for Name, Hierarchy Level, Customer ID, Electronic Record Forms (ERF's) Available, and Actions. The table data is as follows:


Name	Hierarchy Level	Customer ID	Electronic Record Forms (ERF's)		Actions
			Available		
Steve Pike Organization ^	Root	889963	66		
East ^	District	---	5		
Senn School ^	School	---	---		
Counseling Office	Class	---	---		
Testing Lab	Class	---	---		
West v	District	---	20		

\*\*Note: If you would like to purchase additional record forms please contact Riverside Insights' customer service at (800-323-9540) or a local sales representative. To find a sales representative in your area, visit <https://www.riversideinsights.com/support/representatives>. You can also visit the ecommerce site to purchase additional records <https://www.riversideinsights.com/clinical-and-special-needs/>.

### Allocations Page Detail

- **Purchased** – The number of record forms purchased by this organization.
- **Used** – Record forms at this level that have been administered and committed.
- **Available** – The number of record forms that are still available to be allocated.
- **Record Form** – Select the record form to allocate.
- **Enter a Location** – Type the name of a location and click the search icon  to find it.

### Columns




- **Name** – The name of the location. Use the arrows to expand and collapse the list.
- **Hierarchy Level** – The root and sub level for the location on this row.
- **Customer ID** – The ID only appears for the root level.
- **Electronic Record Forms (ERFs) / Available** – The number of record forms available for this location. In this example, the root level has allocated 5 records to the East district and 20 to the West.
- **Actions** – Click the Edit icon  to allocate record form licenses.

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## Manage Allocations

### Add and Remove Licenses

You can add licenses to locations and remove them.

- 1 Open the Allocations page.
  - On the **Organization Management** menu, select **Allocations**.
  - On the Organization tab of the Locations page, click the Allocations icon  on the row of the location for which you want to make allocations.
- 2 If you did not open from the Locations page, find the location to which you want to make allocations.
  - In the Enter a Location box on the right, type part of the name and click the Search icon .
  - In the **Name** column on the left, click the down arrows to expand the list and find the location.
- 3 Click the Edit icon  on the row of the location. The Allocate Licenses box opens.

**Allocate Licenses**

Enter the amount of licenses you would like to add or remove from the selected location.

Location	Available	Add/Remove Allocations	Updated
East	5	<input type="text"/> <b>Add</b> <b>Remove</b>	

**Cancel** **Save**

#### To add licenses:

- 1 Type the number of licenses in the box under **Add/Remove Allocations**. The **Add** and **Remove** buttons are now active.
- 2 Click **Add**. The number under **Updated** appears. This is the number already available plus the license you just added. The **Save** button is now active.
- 3 Click **Save**. You return to the Allocations page. In the **Available** column, the number of licenses is added to the selected location.

#### To remove licenses:

- 1 Type the number of licenses in the box under **Add/Remove Allocations**. The **Add** and **Remove** buttons are now active.
- 2 Click **Remove**. The number under **Updated** appears. This is the number of removed licenses subtracted from the previously available. The **Save** button is now active.
- 3 Click **Save**. You return to the Allocations page. The number in the **Available** column is removed from the selected location.