

REVIEW **SNAP**TM

**Performance Management System
Reference Guide – Managers**

REVIEWSNAP™

A Product of Applied Training Systems, Inc

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Revision History

Name	Date	Reason(s) for Change	Version
Terry Huston	05/23/2011	Initial file	1.0
Terry Huston	08/12/2011	Added details of the following feature: - Auto Finalize Reviews when all signatures have been submitted	1.1
Terry Huston	09/30/2011	Updated guide to include these new features: - Journal entry improvements - Date filter - Private entry designation - Expanded list of attachment types - Attachment icon - Compensation recommendation notes	1.2
Terry Huston	10/17/2011	Documented compensation module enhancements	1.3

Manage Employees

Note The **REVIEWSNAP™** performance management system is highly configurable. If you are unable to access any of the features described in this guide, please contact your administrator for information regarding your company-specific implementation.

Manage Goals To manage an employee's goal plan:

- Navigate to Manage Employees
- Select an employee and click Manage Goals

Information	Actions
Fuller, Finn Allen, Andrew Fuller, Finn Gibson, Grace Henderson, Hannah Isaacs, Isabella Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: <u>Accountant</u> Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10	Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries

- Select the appropriate review period

Review Period: Annual Review Period - 7/1/11 - 6/30/12

Add a Goal Print Goals

Goal Name	Due Date	Status	Progress	Category
Build a strong financial base to sustain our mission and achieve our vision by:- Implementing managed growth - Delivering cost-efficient service - Maximizing market opportunities	6/30/12	On Target	N/A	Financial Update
Create distinctive customer value by enhancing the customer experience:- Image: from commodity to solution - Relationship: trusted partner - Service: personalized customer service - Functionality: seamless access	6/30/12	On Target	N/A	Customer Update
Excel at those things that drive our strategy:- Customer Relationships: develop partnerships with strategic customers - Operations Excellence: continuously improve key processes - Innovation: create new ways of doing business	6/30/12	On Target	N/A	Internal Process Update
Foster loyalty, productivity, and personal growth by:- Enhancing capabilities - Providing a high-quality work environment - Engaging employees in company strategy and success	6/30/12	On Target	N/A	Learning and Growth Update

Lock All Current Goals


Note: “Lock All Current Goals” will disable the employee’s ability to update their own goals.

Continued on next page

Manage Employees, Continued

Manage Goals, (continued)

- Add goals and/or update existing goals

Category:	Financial
Goal Description:	Build a strong financial base to sustain our mission and achieve our vision by: - Implementing managed growth - Delivering cost-efficient service - Maximizing market opportunities
Quantitative Goal:	<input type="text"/>
Current Level:	<input type="text"/>
	<input type="checkbox"/> Smaller Current Level Value is Better.
Due Date:	6/30/12
	<input checked="" type="checkbox"/> Allow Rollover to next Review Period.
Status:	On Target
Actions:	

Continued on next page

Manage Employees, Continued

Create/View Journal Entries

Journal entries are ad hoc notes that can be made at any time. To create new entries and/or update entries that you have previously created on an employee:



- Navigate to Manage Employees
- Select an employee and click Create/View Journal Entries


Fuller, Finn		
Allen, Andrew		
Fuller, Finn	Information	Actions
Gibson, Grace		Create or Complete a Review
Henderson, Hannah		View Completed Reviews
Isaacs, Isabella		Manage Goals
Email: FFuller@reviewsnap.com		Manage 360 Degree Surveys
Manager(s): Andrew Allen		Create/View Journal Entries
Department: Accounting		
Job Title: Accountant		
Employee ID: 7777		
Location: Des Moines		
Hire Date: 7/1/10		

- Create, print, and/or filter Journal Entries

[Create a New Journal Entry](#)

[Print Journal Entries](#)

From:  To: 

Title	Created By	Date	Actions
 2010 Performance Review	Terry Huston	9/21/11	View Update Delete
Project XYZ	Finn Fuller	4/20/11	View Update Delete

Note: The paperclip icon indicates that the entry has an associated attachment.

Continued on next page

Manage Employees, Continued


Create/View Journal Entries, (continued)

- Add new entries and/or update existing entries

Private Entry:

Journal Title:

Journal Entry:



Project XYZ was completed on 3/31/2011 with excellent results. My contributions were:

- Contribution 1
- Contribution 2
- Contribution 3

Attachment:

(* PDF, XLS, XLSX, CSV, DOC, DOCX, EML, MSG, JPG, or GIF)

- o Private entries are only visible to the person who created them.
- o External documentation, such as prior year performance reviews, can be linked to the **REVIEWSNAP™** system using the Journal Entry functionality. Simply create an entry and browse to where the file is stored.

Continued on next page

Manage Employees, Continued

Create or Complete a Review

To create and complete a review:

- Navigate to Manage Employees
- Select an employee and click Create or Complete a Review

Fuller, Finn Allen, Andrew Fuller, Finn Gibson, Grace Henderson, Hannah Isaacs, Isabella	Information	Actions Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries
Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: Accountant Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10		

- Select an available review period then click Continue

Annual Review Period (7/1/10 - 6/30/11) ▾ Annual Review Period (7/1/10 - 6/30/11) Annual Review Period (7/1/11 - 6/30/12)	Continue
--	----------

- Select a review template then click Continue

Employee Review ▾ Employee Review Standard Performance Review I Standard Performance Review II	Continue
--	----------

- Confirm employee, review period, and template information then click Continue

Employee: Fuller, Finn (FFuller@reviewsnap.com) Review Period: 7/1/10 - 6/30/11 Template Name: Employee Review		
Continue	Cancel	Print Blank Evaluation Form

Continued on next page

Manage Employees, Continued

Create or Complete a Review,
(continued)

- Provide competency ratings and comments as required then click Next

Competency Description	0	1	2	3	4	5
Avoids procrastination and prioritizes work in order to meet deadlines.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Comments/Suggestions: Comment Suggestions						
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Finn did his best to ensure that the amount of work produced not only met or exceeded expectations, but met or exceeded quality standards at the same time. For example...</p> </div>						

- Provide goal ratings and comments as required then click Next

Goal Description	1	2	3	4	5
Create distinctive customer value by enhancing the customer experience: - Image: from commodity to solution - Relationship: trusted partner - Service: personalized customer service - Functionality: seamless access	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Update					
Comments:					
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Finn often exceeded customer expectations by diligently attempting to understand customers' needs and then working hard to arrive at a solution in a timely manner. For example...</p> </div>					

- [Optional Step] Set goals for the upcoming review period then click Next

Goal Name	Due Date	Actions	Category
Build a strong financial base to sustain our mission and achieve our vision...	6/30/12	Financial	Update
Create distinctive customer value by enhancing the customer experience: - ...	6/30/12	Customer	Update
Excel at those things that drive our strategy: - Customer Relationships: d...	6/30/12	Internal Process	Update
Foster loyalty, productivity, and personal growth by: - Enhancing capabili...	6/30/12	Learning and Growth	Update

- [Optional Step] Provide summary comments as required then click Next
- [Optional Step] Mark the review ready for signatures

Finn Fuller: ▼

[Click here](#) to mark this review ready for Signatures.

Continued on next page

Manage Employees, Continued

Create or Complete a Review,
(continued)

- [Optional Step] Select additional manager(s) to require signature(s) then click Submit.

If the employee needs to sign-off on this review after all managers have signed off, please check the box below.

Require Employee Signature

If other managers need to sign-off on this review, please select them below and submit. Otherwise, do not select any other managers and click Submit to mark this review ready for Signatures.

Zinn, Zach

- [Optional Step] Click Signatures

Review Period Name	Period Start Date	Period End Date	Reviewer	Actions
Annual Review Period	7/1/10	6/30/11	Allen, Andrew	View Comments Signatures Continue

Note: Signature order is determined by the system administrator and enforced by the system.

- [Optional Step] Type the signature then click Sign

Type	Name	Signature	Date
Manager	Andrew Allen	<input type="text" value="Andrew Allen"/>	5/18/11
Employee	Finn Fuller	Finn Fuller	5/18/11

- Click Back to Manage Reviews
- Click Finalize

Review Period Name	Period Start Date	Period End Date	Reviewer	Actions
Annual Review Period	7/1/10	6/30/11	Allen, Andrew	View Comments Signatures Continue Finalize

- Finalize the review

Finn Fuller:

[Click here](#) to mark this review ready for Signatures.

[Click here](#) to finalize this review. Once the review is finalized, you will not be able to edit any portion of this review.

Note: Finalizing can only happen once all signatures are complete. Your system administrator may choose to automatically finalize reviews once all signatures are submitted. If that is the case, you will not have to manually finalize the review.

Note: At any step during the process, the review may be saved and accessed at another time for completion.

Review Period Name	Period Start Date	Period End Date	Reviewer	Actions
Annual Review Period	7/1/10	6/30/11	Allen, Andrew	View Continue

Continued on next page

Manage Employees, Continued

View Completed Reviews

To view completed self-reviews and/or manager reviews:

- Navigate to Manage Employees
- Select an employee and click View Completed Reviews

Fuller, Finn Allen, Andrew Fuller, Finn Gibson, Grace Henderson, Hannah Isaacs, Isabella	Information Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: <u>Accountant</u> Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10	Actions Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries
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- Click View to open a copy of a completed review for viewing, saving and/or printing

Review Period Name	Period Start Date	Period End Date	Reviewer	Actions
Annual Review Period	7/1/10	6/30/11	Allen, Andrew	View Comments
Annual Review Period	7/1/10	6/30/11	Self	View

Continued on next page

Manage Employees, Continued

Manage 360 Degree Surveys

To kick-off a 360 degree survey on your employee:

- Navigate to Manage Employees
- Select an employee and click Manage 360 Degree Surveys

Fuller, Finn Allen, Andrew Fuller, Finn Gibson, Grace Henderson, Hannah Isaacs, Isabella	<table border="1"> <thead> <tr> <th>Information</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td> Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: Accountant Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10 </td> <td> Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries </td> </tr> </tbody> </table>	Information	Actions	Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: Accountant Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10	Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries
Information	Actions				
Email: FFuller@reviewsnap.com Manager(s): Andrew Allen Department: Accounting Job Title: Accountant Employee ID: 7777 Location: Des Moines Hire Date: 7/1/10	Create or Complete a Review View Completed Reviews Manage Goals Manage 360 Degree Surveys Create/View Journal Entries				

- Click Create 360 Degree Survey
- Complete the survey details

Create 360 Degree Survey

Survey Description:

Target End Date: (M/d/yy)

Select Template:

Show Raters Names on Summary
 Allow Employee to Self-Review
 Break-out Employee Self-Review Ratings
 Break-out Ratings by Rater Type

Continued on next page

Manage Employees, Continued

Manage 360 Degree Surveys,
(continued)

- Click Add Raters

Raters for 360 Degree Survey ending on 6/1/11

[Add Raters](#)

Name	Type	Status	Actions
Fuller, Finn	Self	Not Started	Reminder

- Click Find
- Select a rater type and click Assign for each individual that should be included in the 360 degree survey

[Close Window](#)

Please enter the first and/or last name of the employee you wish to search for and press "Find." Or simply click the "Find" button to show a list of available employees.

If you need to add a rater that is not part of your company, please [click here to add the external rater](#).

First Name:

Last Name:

Find the employee you wish to add as a rater for the selected 360° review, select the appropriate Rater Type and click the "Assign" button next to their name.

First Name	Last Name	Type	Actions
Andrew	Allen	Supervisor	Assign
Barbara	Bates	Select Type	Assign
Carter	Carlson	Supervisor	Assign
Dylan	Davis	Direct Report	Assign
Evan	Eilander	Peer	Assign
		Other	

Note: External raters (e.g. clients) may also be added.

Continued on next page

Manage Employees, Continued

Manage 360 Degree Surveys,
(continued)

- You may add more raters, delete raters, and send reminders at any point until the survey is finalized
- Once a rater has finalized their individual input, you may view their survey by clicking View

Note: Only the survey administrator (the person who assigned the survey) may see the individual rater input.

Add Raters

Name	Type	Status	Actions	
Allen, Andrew	Supervisor	Not Started	Reminder	Delete
Fuller, Finn	Self	Completed	View	
Gibson, Grace	Peer	Not Started	Reminder	Delete
Henderson, Hannah	Peer	Not Started	Reminder	Delete
Isaacs, Isabella	Peer	Not Started	Reminder	Delete

- To close the survey, click Finalize

Target End Date	Administrator	Description	Actions		
6/1/11	Allen, Andrew	Project XYZ	Raters	Update	Finalize

To view the survey summary for a completed 360 degree survey for your employee:

- Click View Summary to open a copy of a completed survey for viewing, saving and/or printing
Note: Survey summaries are anonymous consolidations of all rater input.
- Click Allow Employee to View if you would like the subject of the survey to be able to view/save/print the survey summary.
Note: Once this button is clicked, the ability for the employee to view the summary cannot be revoked.
- Click Raters to view individual survey input
Note: Only the survey administrator (the person who assigned the survey) may see the individual rater input.

End Date	Administrator	Description	Actions		
5/19/11	Allen, Andrew	Project XYZ	View Summary	Raters	<input type="button" value="Allow Employee to View"/>
5/16/11	Allen, Andrew	Project XYZ	View Summary	Raters	

Other Activities

Compensation Dashboard

To make a compensation recommendation:

- Navigate to Compensation Dashboard



- Select the appropriate review period and complete the increase recommendation details

- o Salary Increase

Accounting						
Name	Current Salary	Rating	Pay Grade	Recommendation	Actual Raise	Resulting Salary
Fuller, Finn	\$50,000.00	3.0	Company Increase Recommendations	\$1,500.00 (3.00%)	\$1,500.00 (3.00%)	\$51,500.00
Gibson, Grace	\$50,000.00	3.3	Company Increase Recommendations	\$1,500.00 (3.00%)	\$1,500.00 (3.00%)	\$51,500.00
Henderson, Hannah	\$50,000.00	3.4	Company Increase Recommendations	\$1,500.00 (3.00%)	\$ () (%)	-
Isaacs, Isabella	\$50,000.00	-	Company Increase Recommendations	-	-	-
Department Totals	\$200,000.00				\$3,000.00	\$203,000.00

Note: The system recommends an increase based on the overall performance appraisal rating for the review period. You may accept the system recommendation or change it.

- o Bonus and/or Stock Options

Bonus	Stock Options
\$0.00 (0.00%)	0.00
\$0.00 (0.00%)	0.00
\$ () (%)	
-	-
\$0.00	0.00

- o Effective Date

Effective Date	Actions
7/1/11 Pending Approval	History
7/1/11 Pending Approval	History
<input type="text"/> Submit for Approval	History
-	History
<input type="button" value="Submit"/>	

Notes: Click the icon to include notes regarding the recommendations. Click the History link to view historical compensation data for a user.

- Check Submit for Approval
- Click Submit and your recommendations will begin the approval process

Continued on next page

Other Activities, Continued

Manage eSignatures

When a review form requires your signature:

- Navigate to Manage eSignature



- Click Signatures

Review Period Name	Period Start Date	Period End Date	Employee	Reviewer	Actions
Annual Review Period	7/1/10	6/30/11	Fuller, Finn	Allen, Andrew	View Comments Signatures Update

- Type your name and click Sign

Type	Name	Signature	Date
Manager	Andrew Allen	<input type="text" value="Andrew Allen"/>	5/19/11
Employee	Finn Fuller	not signed	

360 Degree Surveys

To complete 360 degree surveys that require your input:

- Navigate to 360 Degree Survey



- Click Start to begin the survey

End Date	Employee	Description	Status	Actions
6/1/11	Fuller, Finn	Project XYZ	Not Started	Start

- Provide competency ratings and comments as required, clicking Next to advance

Competency Description	0	1	2	3	4	5
Avoids procrastination and prioritizes work in order to meet deadlines.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Comments/Suggestions: <input type="text" value="Comment Suggestions"/>						
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Finn did his best to ensure that the amount of work produced not only met or exceeded expectations, but met or exceeded quality standards at the same time. For example...</p> </div>						

- [Optional Step] Provide summary comments as required then click Next
- Finalize the survey

[Finn Fuller: Finalize Survey](#)

[Click here](#) to finalize this survey. Once the survey is finalized, you will not be able to edit any portion of this survey.

Continued on next page

Other Activities, Continued

360 Degree Surveys, (continued)

Note: At any step during the process, the survey may be saved and accessed at another time for completion.

End Date	Employee	Description	Status	Actions
6/1/11	Fuller, Finn	Project XYZ	Incomplete	Continue Finalize

Create Journal Entries

Journal entries are ad hoc notes that can be made at any time. To create new entries and/or view entries that you have previously created for others in your organization:

- Navigate to Create Journal Entries





- Select the person for whom you would like to create a journal entry


First Name	Last Name	Email	Actions
Andrew	Allen	AAllen@reviewsnap.com	Select
Barbara	Bates	BBates@reviewsnap.com	Select
Carter	Carlson	CCarlson@reviewsnap.com	Select
Dylan	Davis	DDavis@reviewsnap.com	Select

- Create, print, and/or filter Journal Entries

[Create a New Journal Entry](#)

[Print Journal Entries](#)

From:  To: 

Title	Created By	Date	Actions
 2010 Performance Review	Terry Huston	9/21/11	View Update Delete
Project XYZ	Finn Fuller	4/20/11	View Update Delete

Note: The paperclip icon indicates that the entry has an associated attachment.

Continued on next page

Other Activities, Continued

Create Journal Entries, (continued)

- Add new entries and/or update existing entries

Private Entry:

Journal Title:

Journal Entry:

Project XYZ was completed on 3/31/2011 with excellent results. My contributions were:

- Contribution 1
- Contribution 2
- Contribution 3

Attachment:

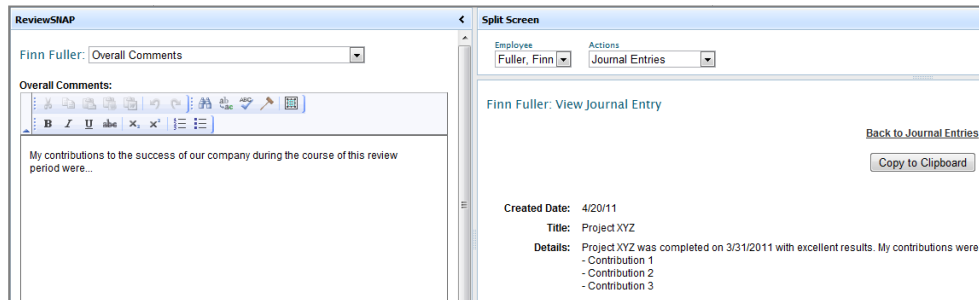
(* PDF, XLS, XLSX, CSV, DOC, DOCX, EML, MSG, JPG, or GIF)

- o Private entries are only visible to the person who created them.
 - o External documentation, such as prior year performance reviews, can be linked to the **REVIEWSNAP™** system using the Journal Entry functionality. Simply create an entry and browse to where the file is stored.
-

Tools

Split Screen Mode

Click Split Screen (upper-right-hand corner) to view multiple documents at the same time. For example, you may reference Performance Reviews, 360 Degree Surveys, Goals, and Journal Entries while you are completing a review.



Spell Check



The spell check tool is available in all comment boxes.

AuthoriCheck



AuthoriCheck is available in all comment boxes. It checks for discriminatory or derogatory language and suggests alternatives.

Comment Suggestions

Comment Suggestions

The Comment Suggestions tool can be made available in the competency evaluation section of a review form. If enabled, it provides potential feedback language for insertion into the comment fields.

