Restricted Administrator Guide

reviewsnap

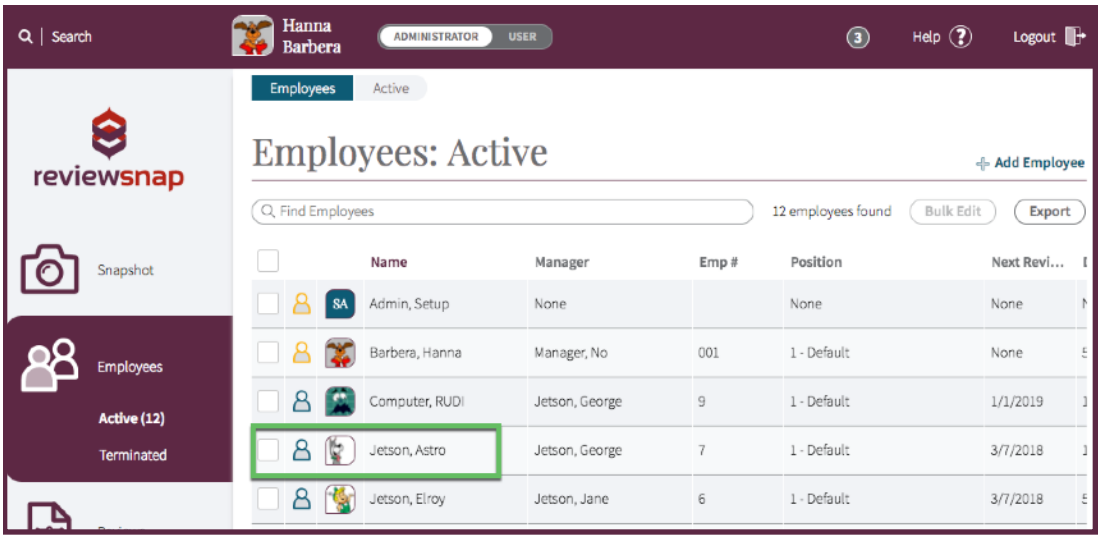
Restricted Admin Set-Up

Restricted Admin access is set-up by a site administrator and allows the individual limited access by manager. They will have access to employee, review and reporting data for this group of employees.

Viewing and Editing Employee Information

Step 1: Toggle to your **Administrator View**

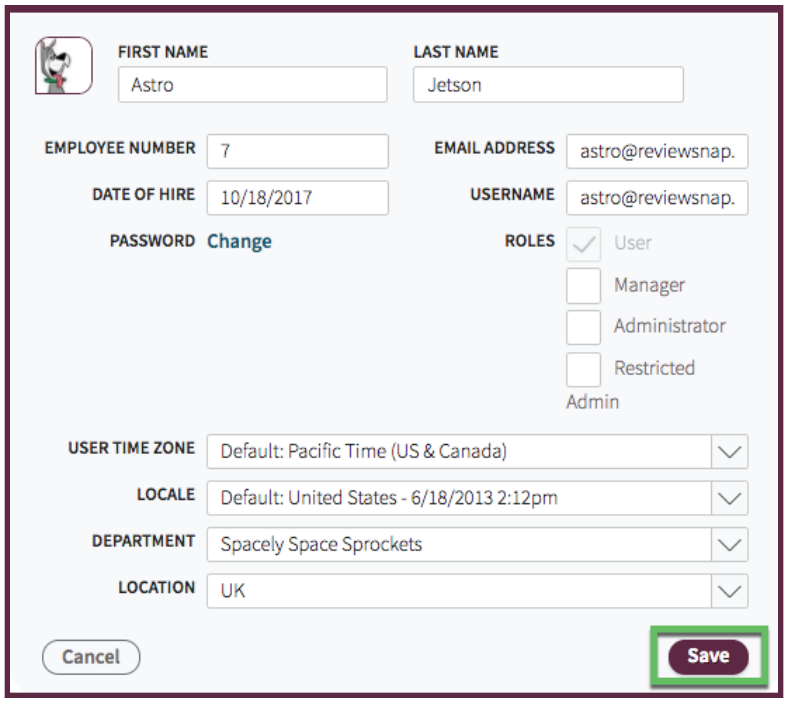
Step 2: Select an Employee



Step 3: Click **Edit**

Step 4: Update Employee Information as needed, make sure to **Save**

Here you can edit the employee's name, employee number, email address, login name and reset their password. You can also make them a manager and update the groups (location or department for example).



Edit Review Information

Here you will update the employee's Manager, Position and Process. Base Date will typically match the employee's Date of Hire unless they have received a new position and this marks their transition date.

PLEASE NOTE WHEN CHANGING MANAGERS AND POSITIONS

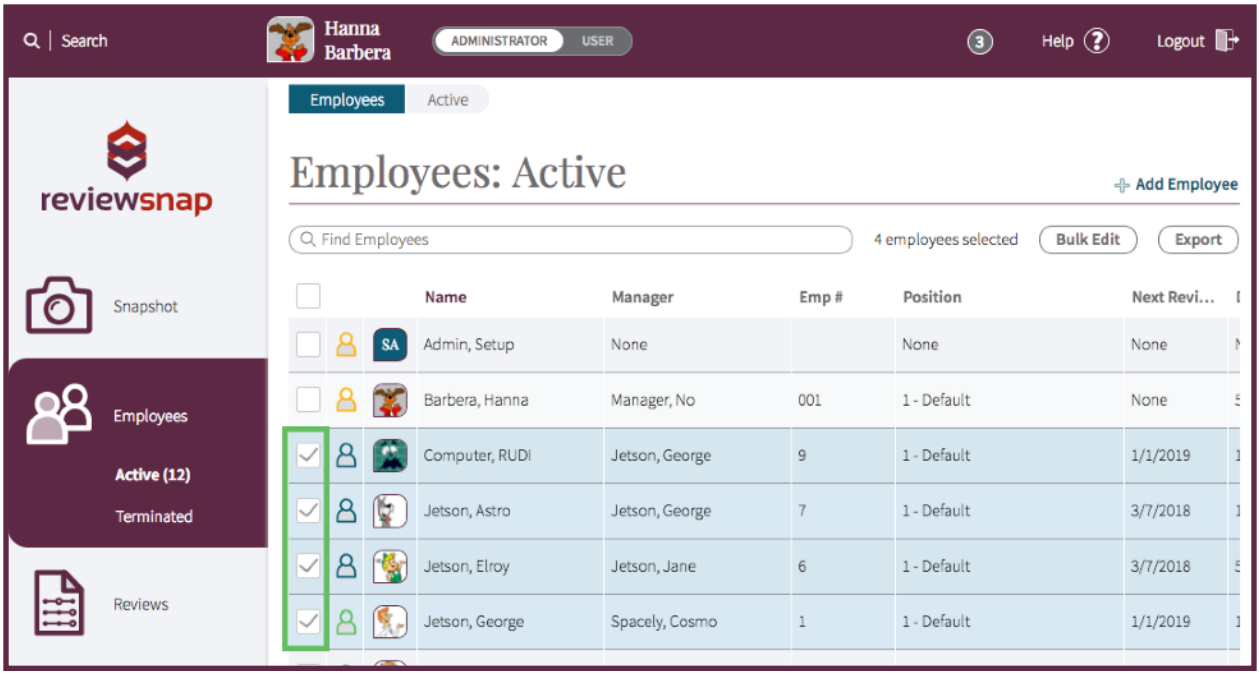
When you update the Manager or Position, Reviewsnap will ask you what you want to do with the current Review. You can select to **Cancel**, which will lose any evaluating data that has been entered but will retain goals and notes entered until that point. You can also select **Leave**, which will retain the scoring data and move the employee to the new manager or position after the review cycle.

If you are updating the manager you will also have an option to **Re-Assign** the document which will retain the scoring data and associate it the the new manager.

Bulk Editing Employee Information

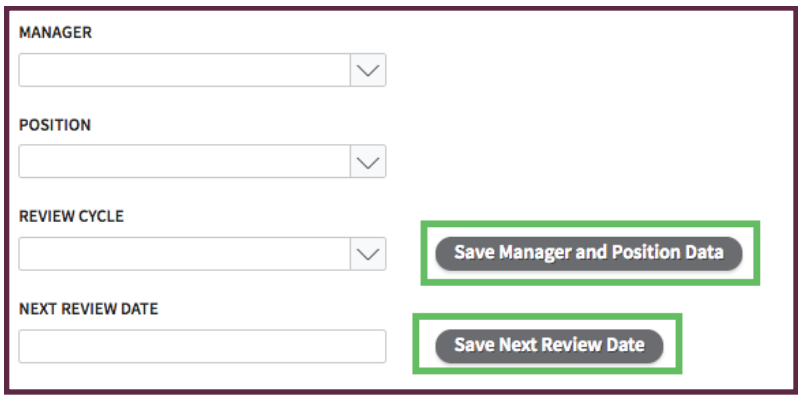
Step 1: Select the Employees from the Employee tab to Update and Click **Bulk Edit**.

Select the employees one at a time by checking the box next to their name.



Step 2: Update the Desired Information, make sure to **Save**

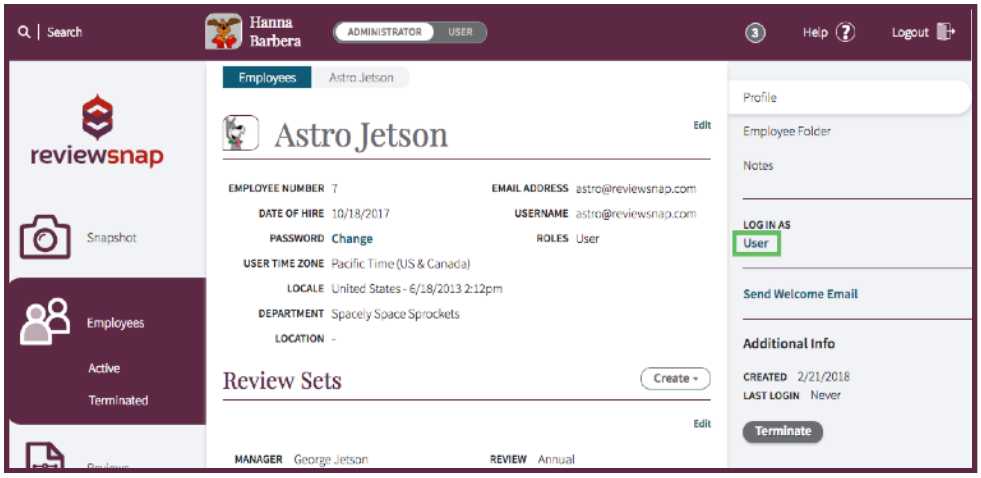
You will be updating the same information for all employees selected. Select the save option for the section you are working in. This tool also allows you to send Welcome Emails in bulk.



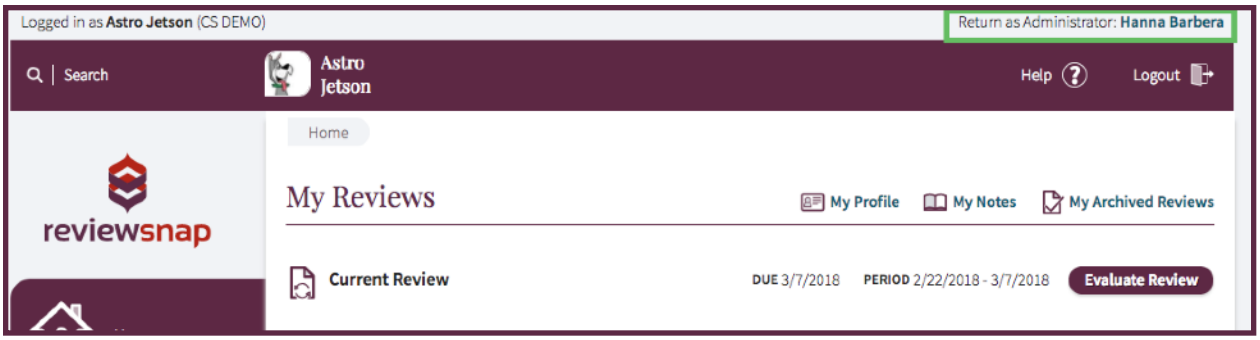
Logging in as an Employee

Step 1: From an Employee's Profile select **'log in as User'**

This allows you to view Reviewsnap as this user and take actions on their behalf. Reviewsnap will track that you are taking these actions in the company log, while proxied into their profile.



Step 2: To log out of this employee's view select Return as Administrator in the upper right corner.



REVIEWSNAP PRO TIP

This is a great way to trouble-shoot your employee's questions since it gives you a sneak peak into exactly what they are seeing and can help walk them through next steps.