

Administrator Guide

Reviewsnap 2019

Administrator Snapshot



What's New? 7

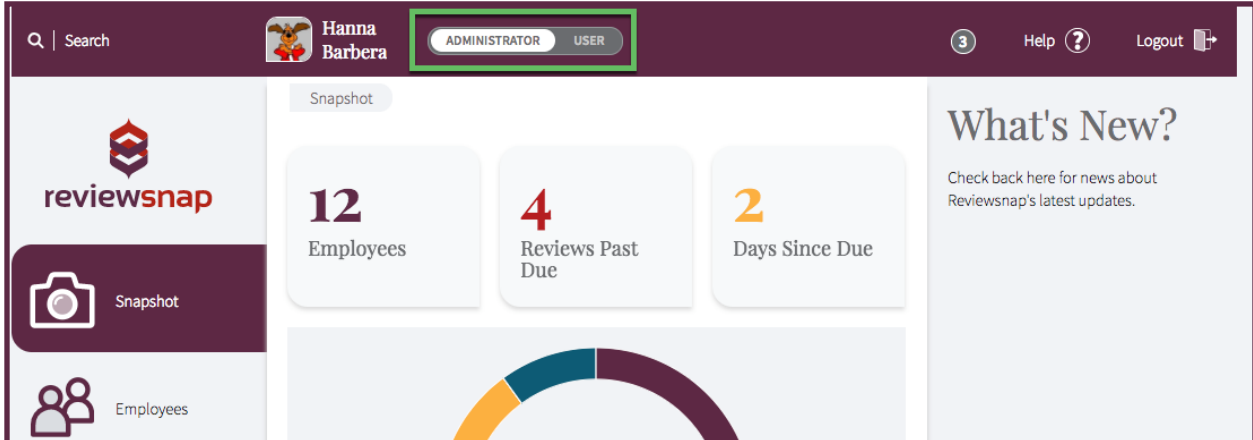
1. Number of Active Employees
2. Number of Review past due
3. Number of days until your next due date or number of days since your last due date
4. Active Review including Review State (Goals & Notes, Evaluating, etc.)
5. Active Self-Reviews In Progress, Submitted and Overridden
6. 360-rater requests In Progress, Declined and Submitted
7. 'What's New' Column includes important Invitations and Updates from Reviewsnap
8. Statistics about actions your users have taken over the last 30 days.
9. Number of emails sent from Reviewsnap to users in the last 30 days.
10. Activity (actions) based on user role in Reviewsnap for the last 30 days.

PLEASE NOTE

The look of the Snapshot will vary depending on your site setup.

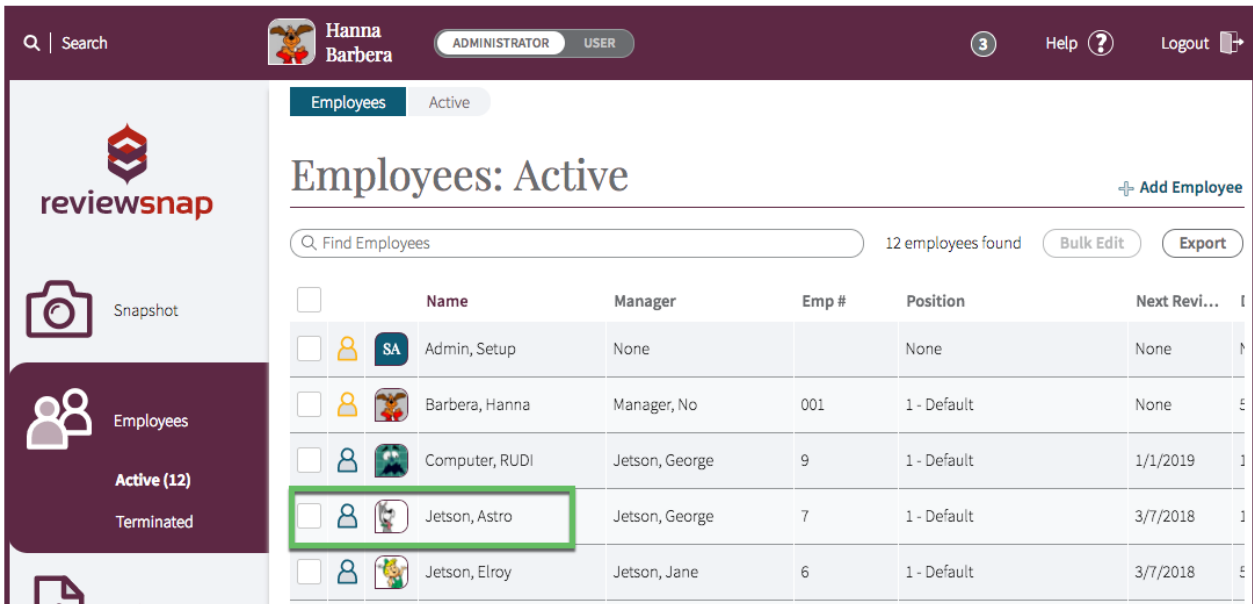
Editing Employee Information

Step 1: Toggle to your Administrator View



The screenshot shows the ReviewSnap dashboard for user Hanna Barbera. In the top navigation bar, there are two tabs: "ADMINISTRATOR" and "USER". The "ADMINISTRATOR" tab is highlighted with a green box, indicating it is the selected view. The dashboard includes a search bar, a sidebar with navigation options like "Snapshot" and "Employees", and a main content area with summary cards for "12 Employees", "4 Reviews Past Due", and "2 Days Since Due". A "What's New?" section is also visible on the right.

Step 2: Select an Employee



The screenshot shows the "Employees: Active" page in the ReviewSnap dashboard. The page title is "Employees: Active" and it includes an "Add Employee" button. A search bar contains "Find Employees" and shows "12 employees found". Below the search bar is a table of active employees. The row for "Jetson, Astro" is highlighted with a green box, indicating it is the selected employee. The table columns are Name, Manager, Emp #, Position, and Next Revi... (Next Review Date).

	Name	Manager	Emp #	Position	Next Revi...
<input type="checkbox"/>	SA Admin, Setup	None		None	None
<input type="checkbox"/>	Barbera, Hanna	Manager, No	001	1 - Default	None
<input type="checkbox"/>	Computer, RUDI	Jetson, George	9	1 - Default	1/1/2019
<input checked="" type="checkbox"/>	Jetson, Astro	Jetson, George	7	1 - Default	3/7/2018
<input type="checkbox"/>	Jetson, Elroy	Jetson, Jane	6	1 - Default	3/7/2018

Step 3: Click **Edit**

The screenshot shows the 'Employees' page for 'Astro Jetson'. At the top, there are tabs for 'Employees' and 'Astro Jetson'. Below the tabs is a profile picture of Astro Jetson and the name 'Astro Jetson'. To the right of the name is a green 'Edit' button. Below the name, there is a list of employee information: EMPLOYEE NUMBER 7, EMAIL ADDRESS astro@reviewsnap.com, DATE OF HIRE 10/18/2017, USERNAME astro@reviewsnap.com, PASSWORD Change, ROLES User, USER TIME ZONE Pacific Time (US & Canada), LOCALE United States - 6/18/2013 2:12pm, DEPARTMENT Spacely Space Sprockets, and LOCATION -.

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).

The screenshot shows the employee edit form. It has a profile picture of Astro Jetson and fields for FIRST NAME (Astro) and LAST NAME (Jetson). Below these are fields for EMPLOYEE NUMBER (7), EMAIL ADDRESS (astro@reviewsnap.com), DATE OF HIRE (10/18/2017), and USERNAME (astro@reviewsnap.com). There is a 'PASSWORD Change' link and a 'ROLES' section with checkboxes for User (checked), Manager, Administrator, and Restricted. Below the roles are dropdown menus for USER TIME ZONE (Default: Pacific Time (US & Canada)), LOCALE (Default: United States - 6/18/2013 2:12pm), DEPARTMENT (Spacely Space Sprockets), and LOCATION (UK). At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in green.

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.

Review Sets

Create ▾

Edit

MANAGER George Jetson	REVIEW CYCLE Annual
POSITION 1 - Default	BASE DATE 10/18/2017

+ Create Future Review



Annual Review

MANAGER George Jetson	DUE DATE 3/7/2018
POSITION 1 - Default	PERIOD 2/22/2018 - 3/7/2018
REVIEW CYCLE Annual	STATUS Evaluating
RATING 3.75 (Highly Effective)	

Cancel · Edit

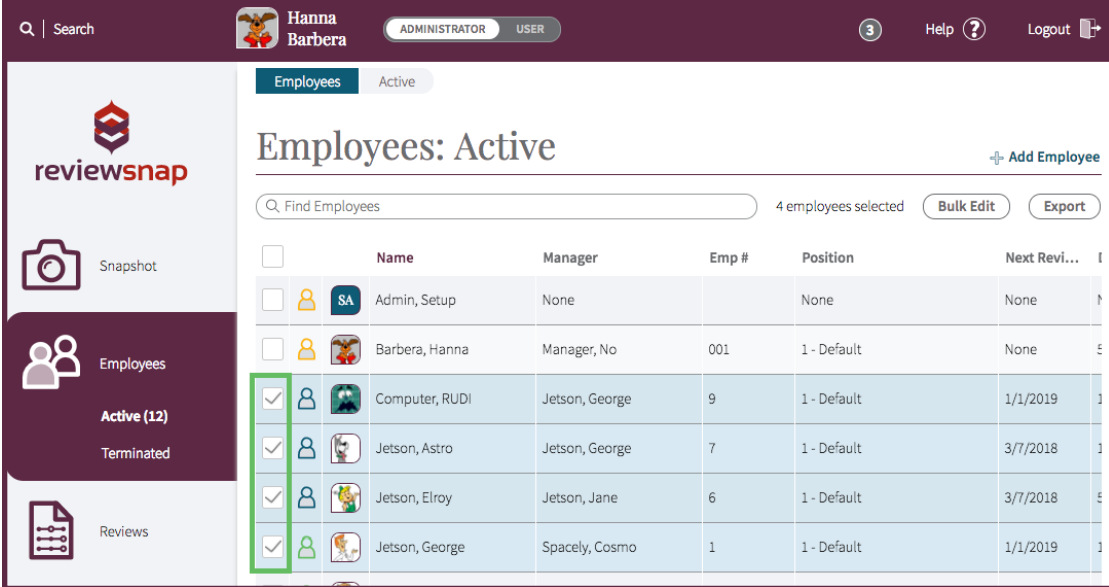
PLEASE NOTE WHEN CHANGING MANAGERS AND POSITIONS

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 rating 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 rating 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**.



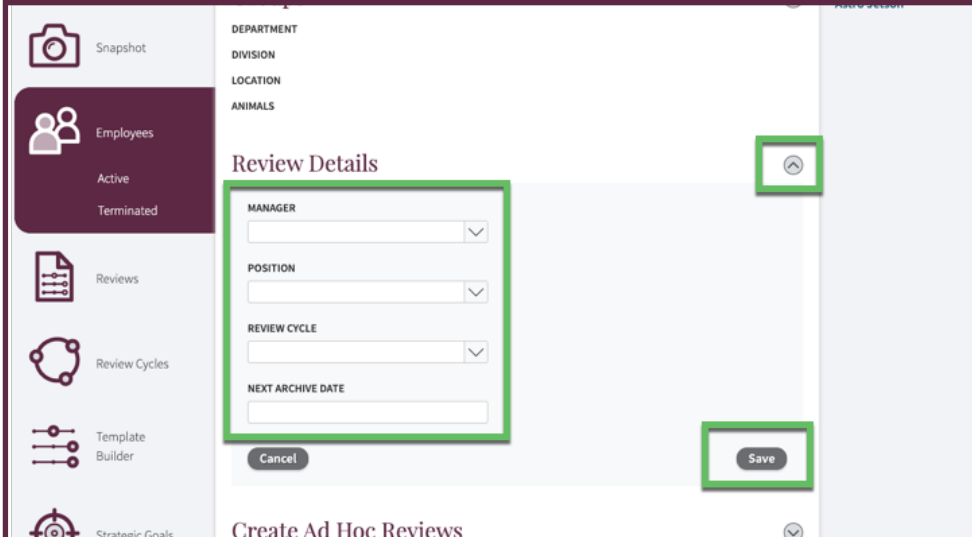
The screenshot shows the 'Employees: Active' page in the ReviewSnap interface. The page header includes the user name 'Hanna Barbera' and roles 'ADMINISTRATOR' and 'USER'. The left sidebar contains navigation options: Snapshot, Employees (Active 12, Terminated), and Reviews. The main content area displays a table of active employees with the following data:

	Name	Manager	Emp #	Position	Next Revi...
<input type="checkbox"/>	Admin, Setup	None		None	None
<input type="checkbox"/>	Barbera, Hanna	Manager, No	001	1 - Default	None
<input checked="" type="checkbox"/>	Computer, RUDI	Jetson, George	9	1 - Default	1/1/2019
<input checked="" type="checkbox"/>	Jetson, Astro	Jetson, George	7	1 - Default	3/7/2018
<input checked="" type="checkbox"/>	Jetson, Elroy	Jetson, Jane	6	1 - Default	3/7/2018
<input checked="" type="checkbox"/>	Jetson, George	Spacely, Cosmo	1	1 - Default	1/1/2019

At the top of the table, it indicates '4 employees selected' and provides 'Bulk Edit' and 'Export' buttons.

Step 2: Expand appropriate Sections to update the desired Information, make sure to **Save**

You will be updating the same information for all employees selected.

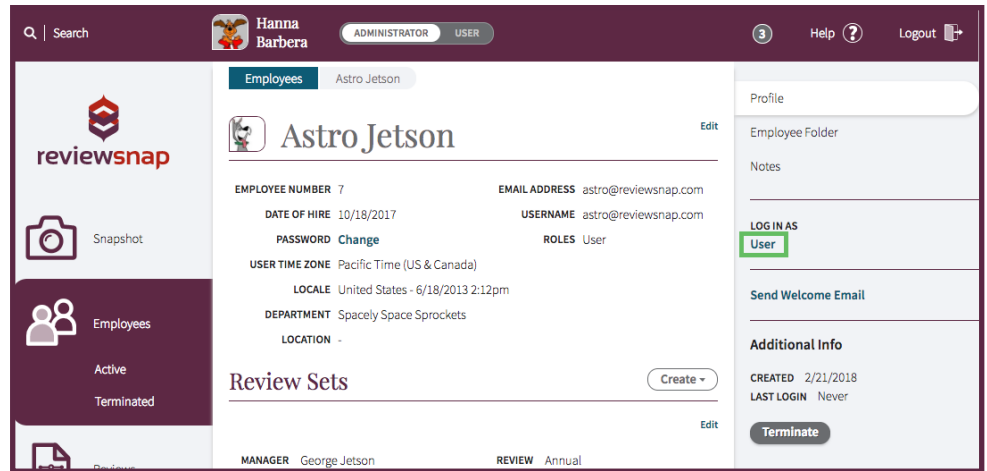


The screenshot shows the 'Review Details' form in the ReviewSnap interface. The form is open for editing and shows fields for MANAGER, POSITION, REVIEW CYCLE, and NEXT ARCHIVE DATE. The 'Save' button is highlighted. The form also includes a 'Cancel' button and a 'Create Ad Hoc Reviews' button at the bottom.

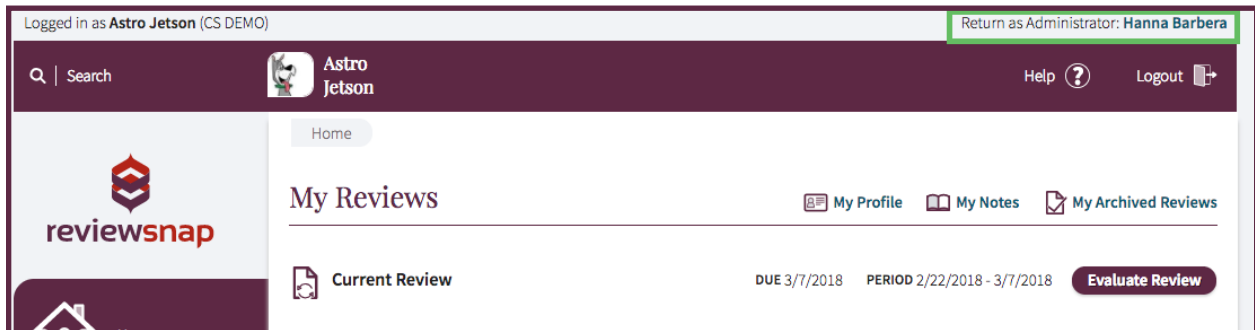
Logging in as an Employee

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.



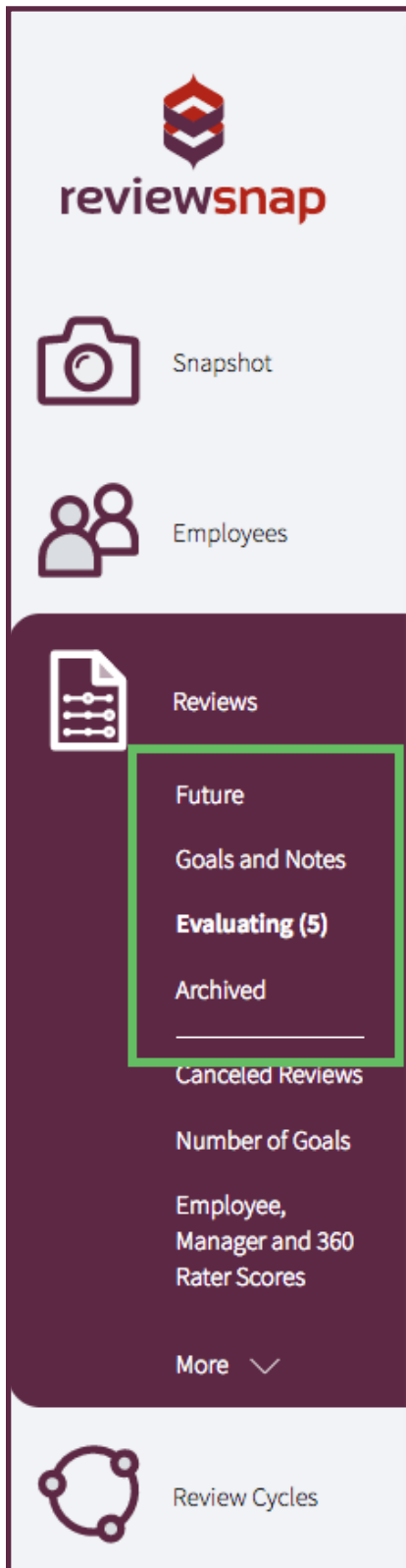
Step 2: To log out of this employee’s view select Return as Administrator in the upper right corner.



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.

Reviews Tab



Future

A future Review is the ability for a manager or employee to set goals in the future while their current review is still open. Future reviews can be created by managers and employees themselves and will appear on their home screen. A list of those reviews will appear here.

Goals and Notes

This list includes all reviews currently in the Goals and Notes phase of the review life cycle. The reviews cannot be evaluated but the employee and/or manager can take notes and set goals during this period. You can sort by any of the columns including the due date to see whose evaluations are coming up.













Evaluating

This reviews list shows you all reviews currently open for evaluation. This can include past due reviews. This page will also indicate the progress of each step in the Review Process: Employee Self-review, Manager review, and Route for Approval.

Archived

This list includes all Archived reviews in your Reviewsnap site. Archived reviews are considered finalized documents in Reviewsnap. Archived reviews are viewable by the employee and their manager for reference within their own Reviewsnap interface. Archived Reviews can only be Unarchived by Site Administrators to return them to a state where further edits/ changes can be made.

Evaluating Reviews: Status Report/Reset Guide

Emp	Mgr	Apr	What this Means	What you can do
			The manager and employee may not have started the review, or it may be partially complete.	Commonly, two in-progress circles indicates this means no work has been done. Follow-up with manager/employee to ensure work is getting done.
			<ul style="list-style-type: none"> - Employee did not complete his/her self-review. - Manager completed the review of the employee. 	Override the employee's self review, or follow-up with employee/manager to ensure work is getting done.
			<ul style="list-style-type: none"> - Employee finished his/her self-review. - Manager didn't finish appraising the employee. It is unknown if the manager never started or if it's partially complete. <p>**This situation is the most complicated because you have to decide whether to preserve the work done by the employee, or just cancel and start fresh.</p>	<p>Log in as manager. Find out if work has been done. If the review was partially completed, ask the manager to finish promptly, then ask the manager to route/ archive.</p> <p>Make a PDF of the Review in it's current state, and attach to the Employee's folder in Reviewsnap.</p> <p>Cancel the review, not worrying about the lost work done on the review, and start fresh.</p>
			<ul style="list-style-type: none"> -Employee completed his/her self-review. - Manager completed the review of the employee. -Approver has not approved the review. 	Be sure Approvers are completing their work to approve. This could also indicate the employee still needs to acknowledge the review in Reviewsnap.
			<ul style="list-style-type: none"> -Employee completed his/her self-review. - Manager completed the review of the employee. - Approver approved the review. 	Archive the review! Or set up Auto Archive in the Processes tab.

Review Cycles

DEFINING THE CYCLE

Review Cycles are the rules by which each review must follow. The rules outlined here could include the routes for approval, the schedule, or whether or not there is a self-review.

Overview

Schedule

Signatures

Rating Formatting

Review Cycle Overview

Goals

This setting allows the employee to add/edit their own goals. By default, managers can add/edit goals in Reviewsnap as long as there is a Goals section on their employee's review. This setting allows the employee to do so as well.

Evaluating Window

This setting dictates the number of days before the due date that managers/employees are allowed to complete the evaluation.

360-rater Feedback

This setting turns on and off the ability for managers to request feedback from other users inside and outside the organization. The option to globally anonymize 360-rater feedback here anonymizes this kind of feedback even to Site Administrators, so please use with extreme caution.

Route for Approval

We have four options for route for approval, make sure to select the one that will work best for your process. A full breakdown of the setting can be found [here](#).

Auto Archive

Reviewsnap offers an automatic archive of documents once all required steps are completed. You can learn more about it [here](#).

Schedule

The dates outlined here will only effect reviews going forward. Adjusting the due date(s) outlined on this page will not change any reviews that are currently assigned to users. You will want to adjust current reviews in the Reviews tab.

[Overview](#)[Schedule](#)[Signatures](#)[Rating Formatting](#)

Base Date vs. Specific Date

Base Date: This type of schedule tells the system to create the next due date relative to an employees Base Date/Date of Hire.

Example: Employees are evaluated every year on the anniversary of their Hire Date.

Specific Date: This type of schedule allows you to set a focal point in the year when everyone will be getting their reviews.

Example: Employees will be reviewed quarterly based on the calendar year (March 31, June 30, September 30, and December 31).

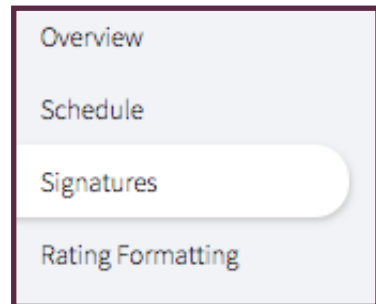
One-time vs. Recurring

One-time: These dates will only ever happen once in your schedule. You may choose to include something like a 90 day introductory review here as a one-time occurrence in the schedule.

Recurring: These due dates will continue to occur indefinitely according to the rules you outline.

Signatures

These Signature lines do not require any action in Reviewsnap. These lines simple create space for wet signatures on a hard copy of the review. If you want to keep your review process all online, you may want to set up the approval routes to include employee acknowledgement and remove all signature lines on this page.



You can automate the description for each signature line as needed for your organization as well as add additional signature lines.

Signatures

TYPE Delete

Signature

DESCRIPTION

Employee Signature

TYPE Delete

Text

DESCRIPTION

I have reviewed this document and discussed the contents with my manager. My signature means that I have been advised of my performance assessment. My signature does not necessarily imply that I agree with the evaluation.

Rating Formatting

The Rating Formatting page allows you to set how the overall score will be shown to Employees and Managers. You can choose from the below.

Numeric:

The overall score is shown as an average on a scale from 1-(chosen number) with a select number of decimal places.

Reverse:

Similar to Numeric, above, the overall score is shown on a scale displaying '1' as the best option.

Percent:

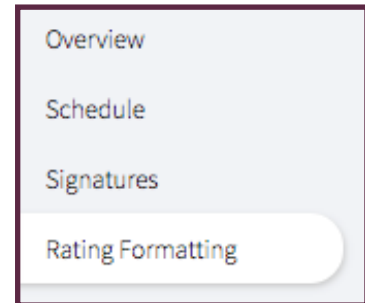
The overall score is shown as a percentage with the selected number of decimal places.

Hidden:

This option hides any overall score calculation. Hidden scores are still calculated so you can draw reports but the score is not shown to the manager or employee.

Range:

This option tells the user a word description as an overall score. You can set the ranges and word descriptions here. Range word descriptions can be used in conjunction with any of the other score formatting options.



Reviewsnap Pro Tip

Your choice for Score Formatting should reflect your rating scales in the Template Builder tab. If you use a 5 point rating scale you should mirror that in your final score formatting. This could be by selecting a 'numeric' rating out of 5 or selecting 'range' and have the word descriptors match the rating scale.

Company Settings

LOGIN NAME

FULL NAME

Login Name: This is the unique identifier that associates an employee to your organization when they login to Reviewsnap. Employees will need to remember this so we recommend keeping it simple!

Full Name: This name will appear at the top of the page and in the tab of the user's Web Browser.

Time Zone and Locale: This setting outlines the global time zone and format for time and date. This can be adjusted on an individual basis on an employee's profile for remote employees.

Company Logo and White Labeling: Here you can upload your organization's logo to be used throughout Reviewsnap and on PDF versions of reviews.

TIME ZONE

LOCALE

COMPANY LOGO

WHITE LABELING

EMAIL NOTIFICATIONS

EMAIL NOTIFICATION FROM

EMAIL REMINDERS SENT AT

This applies to all email reminders, but does not control event-based emails.

Email Notifications: Enable/Disable email notifications for your entire site. This setting controls whether Reviewsnap can send emails to your users. The only email that will go out when this is Disabled is the 'Welcome Email' that sends a new user their login credentials.