

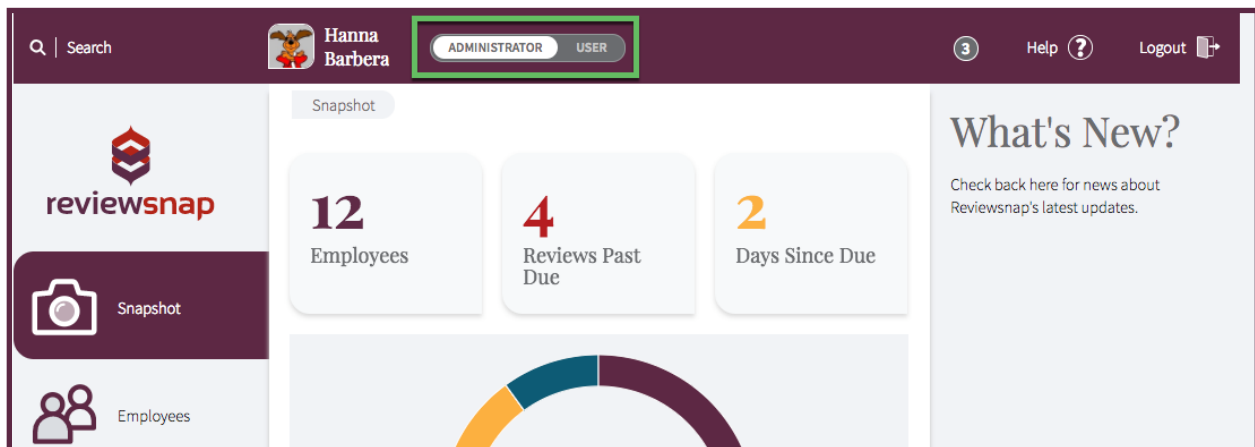
Restricted Administrator Guide

Restricted Admin Set-Up

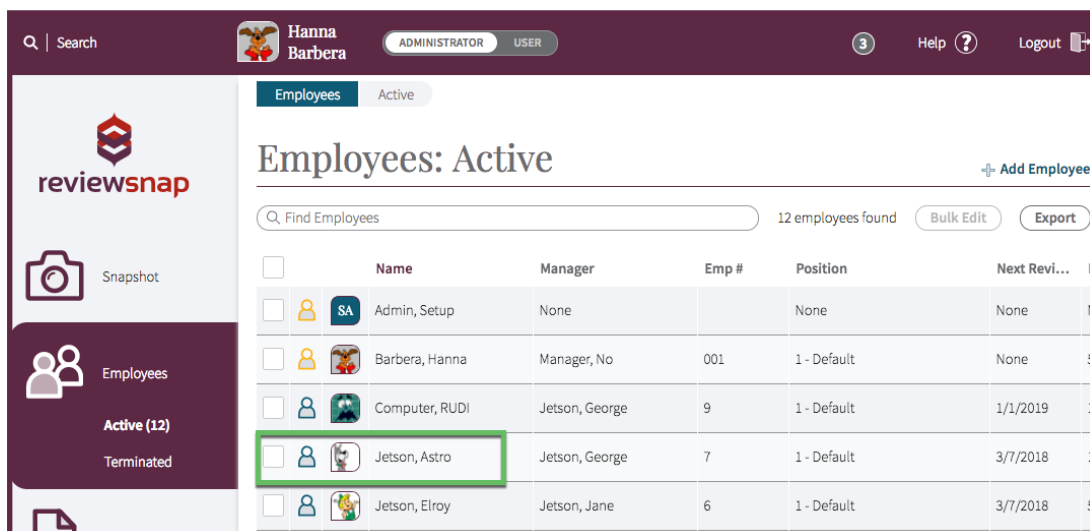
Restricted Admin access is set-up by a site administrator and allows the individual limited access by manager. They will have access to employee, review and reporting data for this group of employees.

Viewing and Editing Employee Information

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



Step 2: Select an Employee



Step 3: Click **Edit**

The screenshot shows the 'Employees' page for 'Astro Jetson'. At the top, there is a header with 'Employees' and 'Astro Jetson'. Below this is a profile picture of a dog and the name 'Astro Jetson'. To the right of the name is a green 'Edit' button. The main content area lists the following details:

- 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
- 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 'Edit Employee' form for 'Astro Jetson'. The form contains the following fields and options:

- FIRST NAME**: Astro
- LAST NAME**: Jetson
- EMPLOYEE NUMBER**: 7
- EMAIL ADDRESS**: astro@reviewsnap.
- DATE OF HIRE**: 10/18/2017
- USERNAME**: astro@reviewsnap.
- PASSWORD**: [Change](#)
- ROLES**:
 - User
 - Manager
 - Administrator
 - Restricted
 - Admin
- USER TIME ZONE**: Default: Pacific Time (US & Canada) (dropdown)
- LOCALE**: Default: United States - 6/18/2013 2:12pm (dropdown)
- DEPARTMENT**: Spacely Space Sprockets (dropdown)
- LOCATION**: UK (dropdown)

At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a green border.

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

Cancel · Edit

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)	

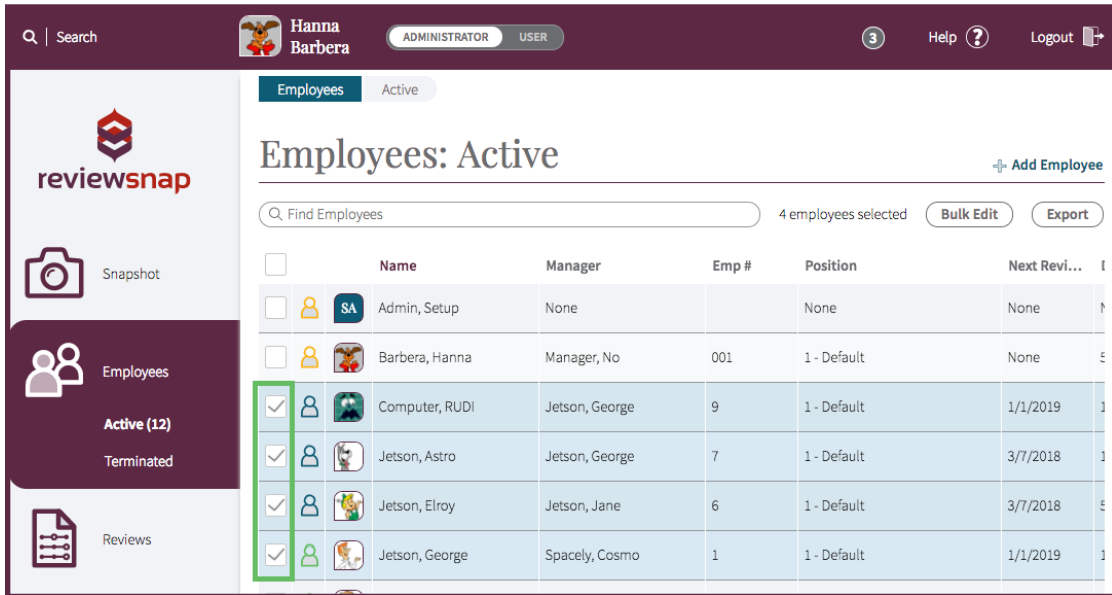
PLEASE NOTE WHEN CHANGING MANAGERS AND POSITIONS

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.

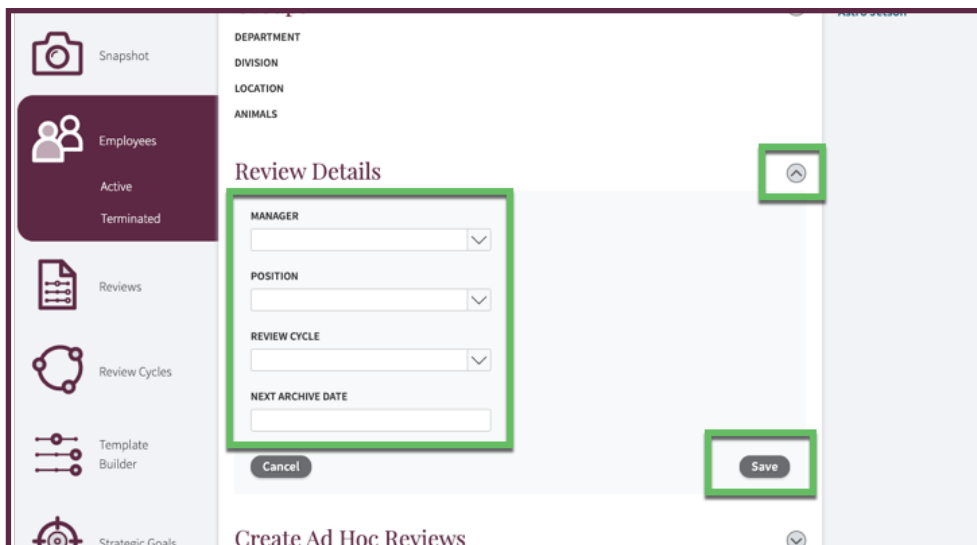
Bulk Editing Employee Information

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



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

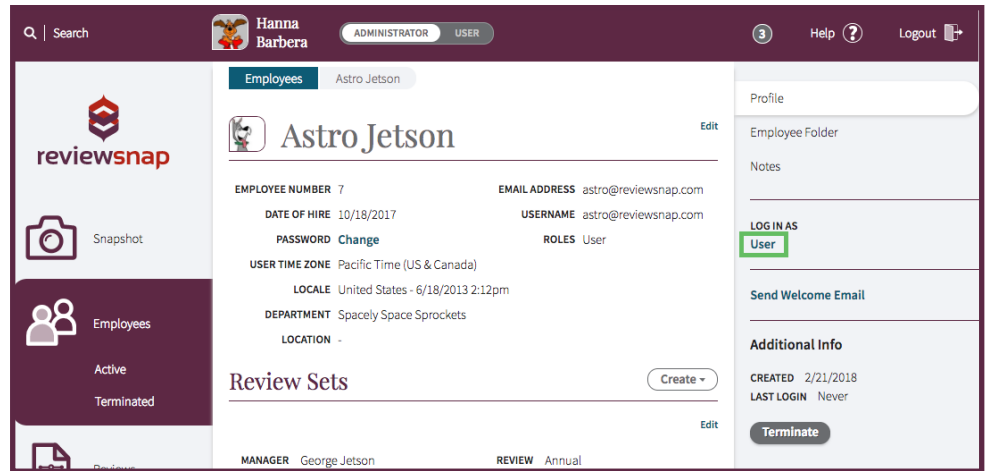
You will be updating the same information for all employees selected.



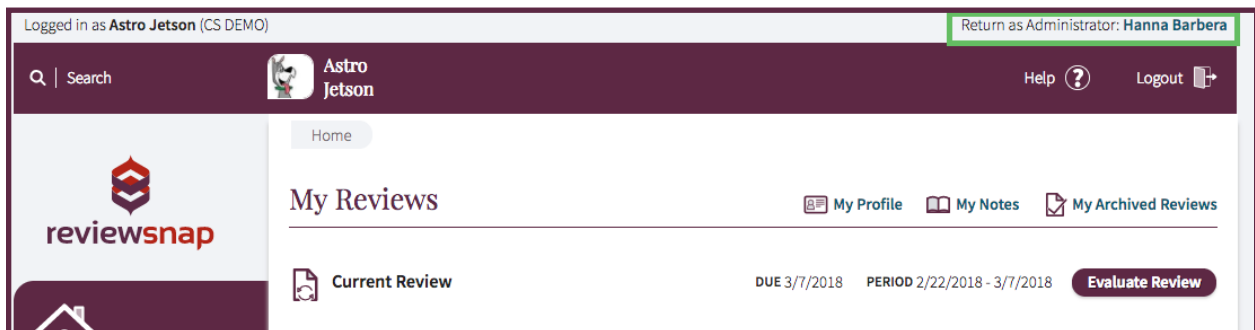
Logging in as an Employee

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.