

# Administrator Guide

Reviewsnap 2020

# Administrator Snapshot



## What's New? 7

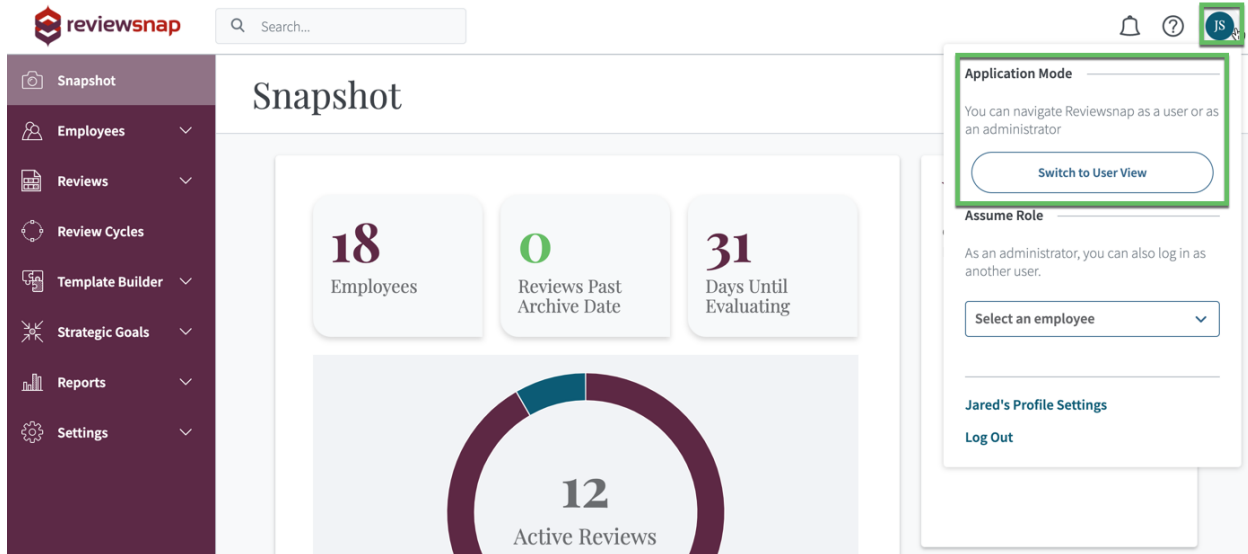
1. Number of Active Employees
2. Number of Review past due
3. Number of days until your next due date or number of days since your last due date
4. Active Review including Review State (Goals & Notes, Evaluating, etc.)
5. Active Self-Reviews In Progress, Submitted and Overridden
6. 360-rater requests 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

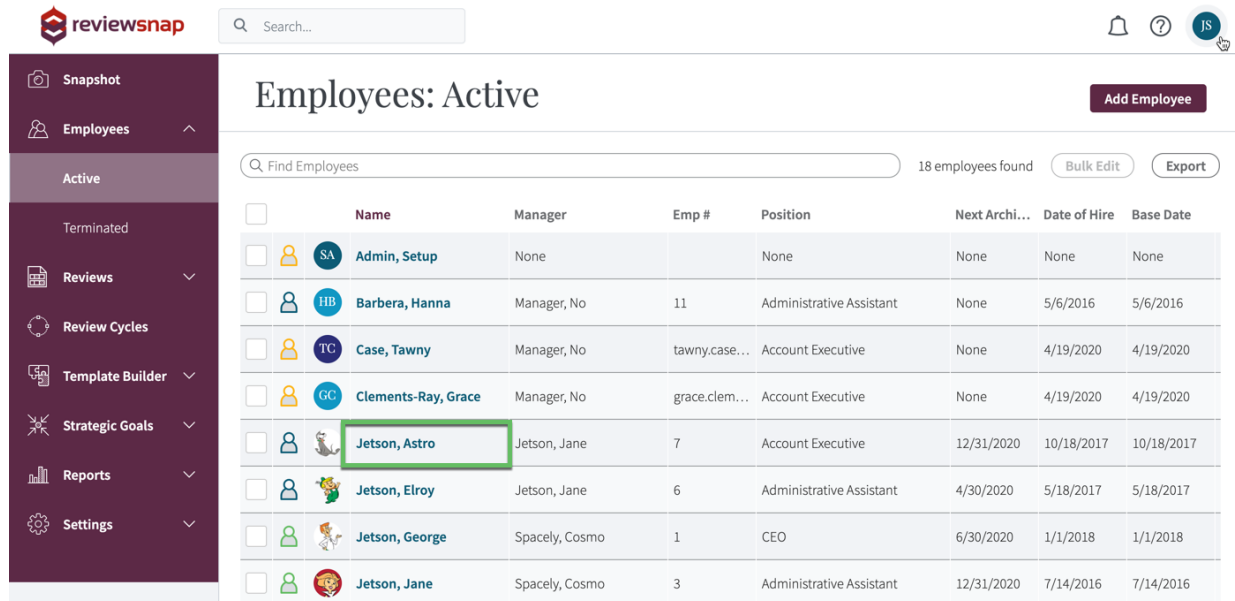
# Editing Employee Information

## Step 1: Ensure your 'Application Mode' is in Administrator View



The screenshot shows the Reviewsnap dashboard with a sidebar on the left containing navigation links: Snapshot, Employees, Reviews, Review Cycles, Template Builder, Strategic Goals, Reports, and Settings. The main content area displays a 'Snapshot' with three key metrics: 18 Employees, 0 Reviews Past Archive Date, and 31 Days Until Evaluating. Below these is a donut chart showing 12 Active Reviews. On the right, a dropdown menu for 'Application Mode' is open, showing options to 'Switch to User View' and 'Assume Role'. The 'Assume Role' section includes a dropdown to 'Select an employee' and links for 'Jared's Profile Settings' and 'Log Out'.

## Step 2: Select an Employee



The screenshot shows the 'Employees: Active' page in Reviewsnap. The sidebar on the left has 'Active' selected under the 'Employees' section. The main content area displays a table of active employees. A search bar at the top of the table shows 'Find Employees' and '18 employees found'. There are 'Bulk Edit' and 'Export' buttons. The table has columns for Name, Manager, Emp #, Position, Next Archi..., Date of Hire, and Base Date. The employee 'Jetson, Astro' is highlighted with a green box.

|                          | Name                   | Manager        | Emp #         | Position                 | Next Archi... | Date of Hire | Base Date  |
|--------------------------|------------------------|----------------|---------------|--------------------------|---------------|--------------|------------|
| <input type="checkbox"/> | SA Admin, Setup        | None           |               | None                     | None          | None         | None       |
| <input type="checkbox"/> | HB Barbera, Hanna      | Manager, No    | 11            | Administrative Assistant | None          | 5/6/2016     | 5/6/2016   |
| <input type="checkbox"/> | TC Case, Tawny         | Manager, No    | tawny.case... | Account Executive        | None          | 4/19/2020    | 4/19/2020  |
| <input type="checkbox"/> | GC Clements-Ray, Grace | Manager, No    | grace.clem... | Account Executive        | None          | 4/19/2020    | 4/19/2020  |
| <input type="checkbox"/> | Jetson, Astro          | Jetson, Jane   | 7             | Account Executive        | 12/31/2020    | 10/18/2017   | 10/18/2017 |
| <input type="checkbox"/> | Jetson, Elroy          | Jetson, Jane   | 6             | Administrative Assistant | 4/30/2020     | 5/18/2017    | 5/18/2017  |
| <input type="checkbox"/> | Jetson, George         | Spacely, Cosmo | 1             | CEO                      | 6/30/2020     | 1/1/2018     | 1/1/2018   |
| <input type="checkbox"/> | Jetson, Jane           | Spacely, Cosmo | 3             | Administrative Assistant | 12/31/2020    | 7/14/2016    | 7/14/2016  |

## Step 3: Click Edit



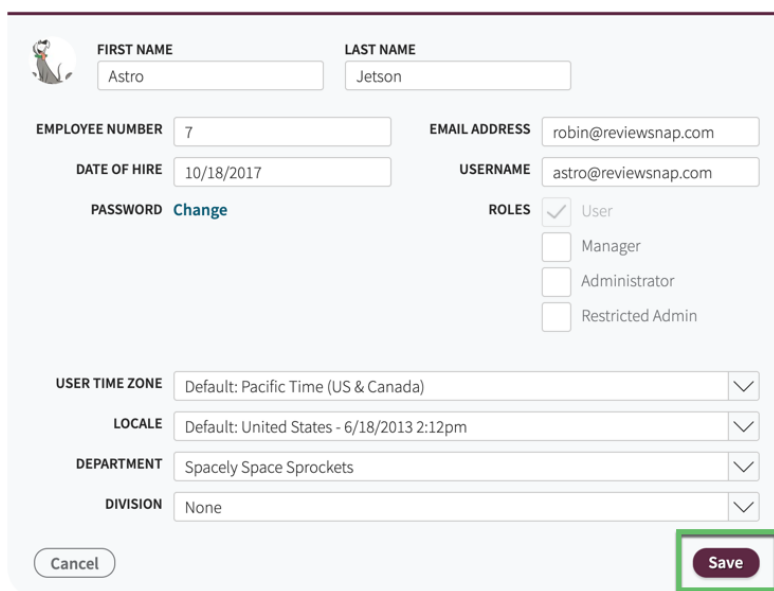
# Astro Jetson

[Edit](#)

**EMPLOYEE NUMBER** 7 **EMAIL ADDRESS** robin@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  
**DIVISION** -

## 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. At the top left is the Astro Jetson logo. The form is divided into two columns. The left column contains: 'FIRST NAME' (Astro), 'LAST NAME' (Jetson), 'EMPLOYEE NUMBER' (7), 'DATE OF HIRE' (10/18/2017), 'PASSWORD' (Change), 'USER TIME ZONE' (Default: Pacific Time (US & Canada)), 'LOCALE' (Default: United States - 6/18/2013 2:12pm), 'DEPARTMENT' (Spacely Space Sprockets), and 'DIVISION' (None). The right column contains: 'EMAIL ADDRESS' (robin@reviewsnap.com), 'USERNAME' (astro@reviewsnap.com), and 'ROLES' (User, Manager, Administrator, Restricted Admin). The 'User' role is selected with a checked checkbox. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Save' button, which 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** Jane Jetson**REVIEW** Annual  
**CYCLE****POSITION** Account Executive**BASE DATE** 10/18/2017[+ Create Future Review](#)

### Annual Review

[Cancel Review · Edit](#)**MANAGER** Jane Jetson**ARCHIVE** 12/31/2020  
**DATE****POSITION** Account Executive**PERIOD** 5/30/2020 - 12/31/2020**REVIEW** Annual  
**CYCLE****STATUS** Goals and Notes

## 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

# 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. A sidebar on the left contains navigation links: Snapshot, Employees (selected), Active, Terminated, Reviews, Review Cycles, Template Builder, Strategic Goals, Reports, and Settings. The main area displays a table of active employees. A green box highlights the first six rows, which are selected. Above the table, there is a search bar, a 'Find Employees' button, and a status bar indicating '6 employees selected' with 'Bulk Edit' and 'Export' buttons. The table columns are: Name, Manager, Emp #, Position, Next Archi..., Date of Hire, and Base Date.

|                                     | Name            | Manager        | Emp # | Position                 | Next Archi... | Date of Hire | Base Date  |
|-------------------------------------|-----------------|----------------|-------|--------------------------|---------------|--------------|------------|
| <input checked="" type="checkbox"/> | Jetson, Astro   | Jetson, Jane   | 7     | Account Executive        | 12/31/2020    | 10/18/2017   | 10/18/2017 |
| <input checked="" type="checkbox"/> | Jetson, Elroy   | Jetson, Jane   | 6     | Administrative Assistant | 4/30/2020     | 5/18/2017    | 5/18/2017  |
| <input checked="" type="checkbox"/> | Jetson, George  | Spacely, Cosmo | 1     | CEO                      | 6/30/2020     | 1/1/2018     | 1/1/2018   |
| <input checked="" type="checkbox"/> | Jetson, Jane    | Spacely, Cosmo | 3     | Administrative Assistant | 12/31/2020    | 7/14/2016    | 7/14/2016  |
| <input checked="" type="checkbox"/> | Jetson, Judy    | Jetson, Jane   | 5     | Student                  | 6/30/2020     | 1/8/2018     | 1/8/2018   |
| <input checked="" type="checkbox"/> | Jetson, Orbitty | Jetson, Jane   | 8     | Student                  | 6/30/2020     | 5/25/2017    | 5/25/2017  |
| <input type="checkbox"/>            | Johnson, Marge  | Manager, No    | 999   | HR Director              | None          | 4/23/2020    | 4/23/2020  |
| <input type="checkbox"/>            | Orbit, Henry    | Spacely, Cosmo | 10    | Administrative Assistant | 6/30/2020     | 9/21/2016    | 9/21/2016  |

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

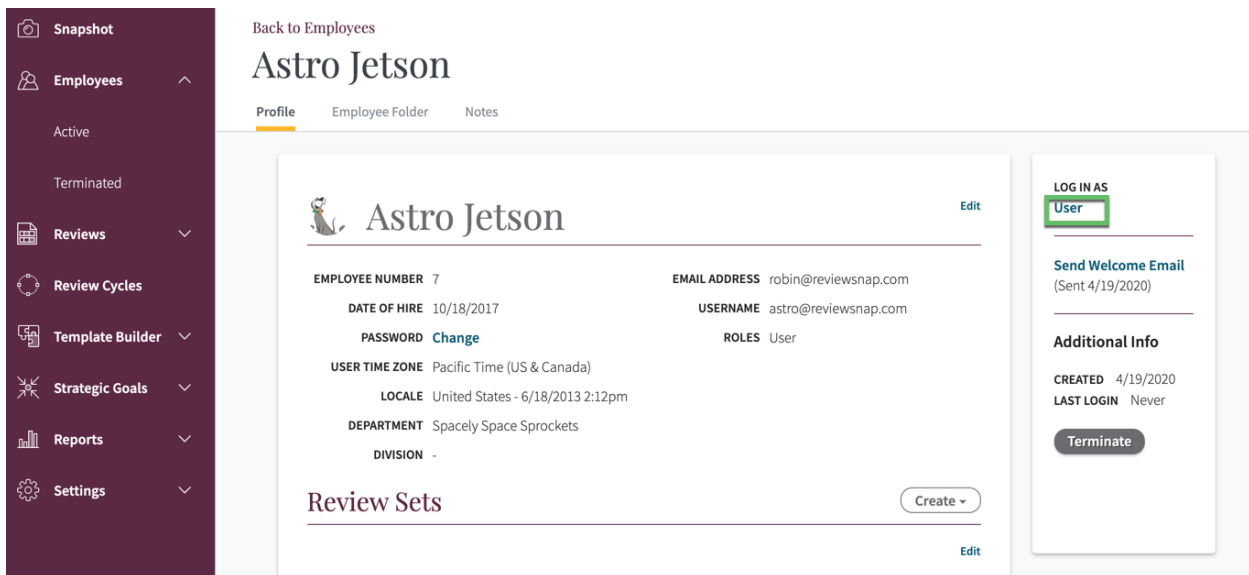
You will be updating the same information for all employees selected.

The screenshot shows the 'Editing 6 Employees' modal in the Reviewsnap interface. The modal has a sidebar on the left with links: Groups, DEPARTMENT, DIVISION, Review Details (selected), MANAGER, POSITION, REVIEW CYCLE, and NEXT ARCHIVE DATE. The main area displays the 'Review Details' section, which includes a 'MANAGER' dropdown, a 'POSITION' dropdown, a 'REVIEW CYCLE' dropdown, and a 'NEXT ARCHIVE DATE' text input. A green box highlights the 'MANAGER' dropdown. At the bottom of the modal, there are 'Cancel' and 'Save' buttons. A list of the 6 employees being edited is shown on the right: Judy Jetson, Elroy Jetson, George Jetson, Astro Jetson, Orbitty Jetson, and Jane Jetson.

# 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.

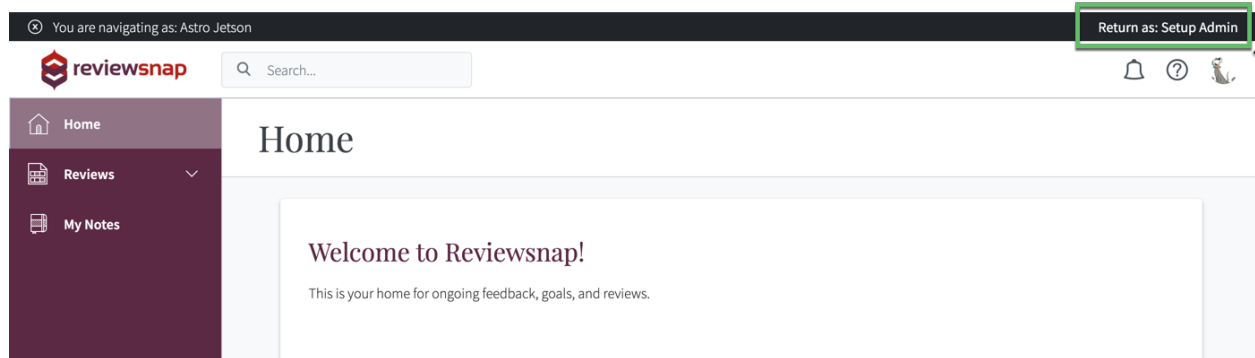


The screenshot displays the Reviewsnap interface. On the left is a dark purple sidebar with navigation icons and labels: Snapshot, Employees (with a dropdown arrow), Active, Terminated, Reviews (with a dropdown arrow), Review Cycles, Template Builder (with a dropdown arrow), Strategic Goals (with a dropdown arrow), Reports (with a dropdown arrow), and Settings (with a dropdown arrow). The main content area has a header with 'Back to Employees' and the employee name 'Astro Jetson'. Below the name are tabs for 'Profile' (selected), 'Employee Folder', and 'Notes'. The profile section shows a card for 'Astro Jetson' with an 'Edit' link. Below the card, employee details are listed in two columns: EMPLOYEE NUMBER 7, DATE OF HIRE 10/18/2017, PASSWORD Change, USER TIME ZONE Pacific Time (US & Canada), LOCALE United States - 6/18/2013 2:12pm, DEPARTMENT Spacely Space Sprockets, DIVISION -, EMAIL ADDRESS robin@reviewsnap.com, USERNAME astro@reviewsnap.com, and ROLES User. At the bottom of this section is a 'Review Sets' section with a 'Create' button and an 'Edit' link. On the right side of the profile card, there is a 'LOG IN AS User' button, a 'Send Welcome Email (Sent 4/19/2020)' link, an 'Additional Info' section with 'CREATED 4/19/2020' and 'LAST LOGIN Never', and a 'Terminate' button.

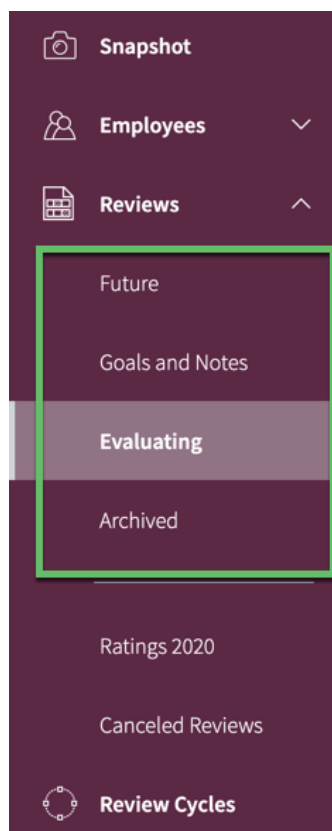
### REVIEWSNAP PRO TIP

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.

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



## 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"> <li>- Employee did not complete his/her self-review.</li> <li>- Manager completed the review of the employee.</li> </ul>   | Override the employee's self review, or follow-up with employee/manager to ensure work is getting done.  |
|   |   |   | <ul style="list-style-type: none"> <li>- Employee finished his/her self-review.</li> <li>- Manager didn't finish appraising the employee. It is unknown if the manager never started or if it's partially complete.</li> </ul> <p><b>**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.</b></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"> <li>-Employee completed his/her self-review.</li> <li>- Manager completed the review of the employee.</li> <li>-Approver has not approved the review.</li> </ul>   | 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"> <li>-Employee completed his/her self-review. - Manager completed the review of the employee.</li> <li>- Approver approved the review.</li> </ul>   | Archive the review! Or set up Auto Archive in the Processes tab.   |

# Review Cycles

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## 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.

## Review Cycle Overview

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### Overview

### Schedule

### Signatures

### Rating Formatting

#### 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

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Overview

**Schedule**

Signatures

Rating Formatting

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.

### 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.

### 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

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

These Signature lines do not require any action in Reviewsnap. These lines simply 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

Signature

Delete

DESCRIPTION

Employee Signature

TYPE

Text

Delete

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

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

The Rating Formatting page allows you to set how the overall score will be shown to Employees and Managers. You can chose 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 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:** 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.

## EMAIL NOTIFICATIONS

## EMAIL NOTIFICATION FROM

## EMAIL REMINDERS SENT AT

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