Welcome to Gradience Basics Records

**The Gradience Basics Difference**

Thanks for choosing Gradience Basics, the new leader in small business Records solutions.


**Basics Records** perfectly complements Basics Attendance, providing an unmatched experience in recordkeeping for small businesses. Records helps you manage, store and collect everything from the most basic employee data to Wage and Withholding, Emergency Contact, Insurance and Benefits data and more. With eight advanced reports and the ability to attach files to employee records, Basics Records puts you on the road to improved compliance and records management.

## System Requirements

**Minimum**

- Windows XP Home (SP2), Windows XP Professional (SP2), Windows 2000 Professional
- Windows .NET Framework 2.0
- Pentium III CPU
- 512 MB available RAM (Random Access Memory)
- 100 MB available hard disk space
- Access to a CD-ROM drive
- VGA monitor with 800 x 600, 16-bit True Color

**Recommended**

- Windows Vista Home Premium or Business, Windows XP Professional with SP2, Windows 2000 Professional, Windows 2003 Server
- SQL Server Express 2005 with Service Pack 2 (if not present, will be installed by Gradience Basics setup program)
- Pentium IV or higher CPU
- 1 GB available RAM (Random Access Memory)
- 250 MB available hard disk space
- DVD-ROM drive
- SVGA monitor with 1024 x 768, High Color or better
- Windows-compatible graphics-quality printer
- Network adaptor with TCP/IP protocol installed (for TimeClock/Time Station network connectivity)

## Installing Gradience Basics

Installing Gradience Basics is simple. Just follow the steps below:

1. Double-click the **Setup** installation package.
2. Read the **Welcome** message and click **Next**.
3. Read through and accept the EULA (End User License Agreement).
4. Select the **Destination** folder.
5. Select your **database** (this dialog only appears if you have previously installed another Gradience Basics application first), then click **Next**[*].
6. At the confirmation screen, click **Install** to finish installation.
7. At the end of installation, you either can click finish to close or put a check in the box to launch the application.

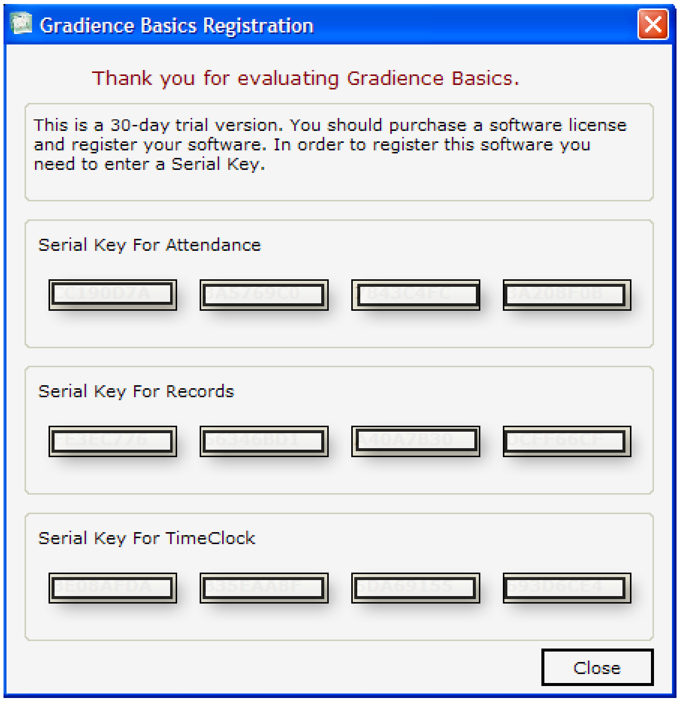
[*]*Gradience Basics requires SQL Server 2005 Express Edition SP2 database. If SQL Server has not been installed on your system, the setup installation package will install it for you.*

# Unlocking Your Copy of Gradience

By default, you have 30 days to evaluate any Gradience Basics product. After this trial period expires, you no longer will be able to use the application. Use your purchased serial key to unlock the full version of your application.

There are two methods to unlock your copy of Gradience Basics:

1. You can enter your product key in the boxes shown when Gradience Basics starts up.
2. You can use the **Help** menu and click **Change Product License**.



# Common Features in Gradience Basics

**Getting the Most out of Gradience Basics**

Whether you already own all three Gradience Basics applications or are just considering the purchase of one of the modules you do not own, this section can help.

Below are some common features found in the Gradience Basics applications. We've labeled the screen shots with the application name so you know which of the three Gradience Basics applications the feature is found in. Now, let's explore some of the great things you can do with Gradience Basics.

# Basics Records

**About Records Folders and Overlays**

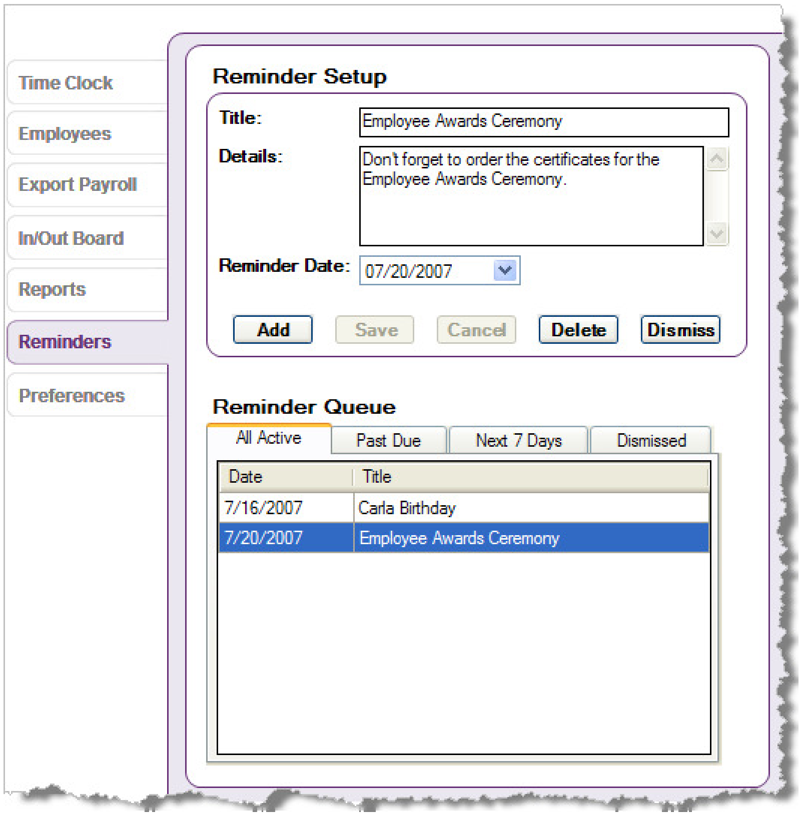
Basics Records and the Records tab show nine (9) folders that correspond to information you can enter for any employee.

To get a deeper look at the employee's data, single-click any of the nine folders and an overlay showing you all the information filled out in that section appears in the middle of your screen.

To edit an entry, click on the hyperlink next to the item (for example, Name, Address, Phone, etc.) and you will be taken directly to the field on the **Employees** tab, where you can add, update or delete information. Alternately, clicking the **edit** hyperlink also will bring you to the section (i.e. Wage/Withholding) where you can edit information:


**Global - Basics Attendance / Records / TimeClock**

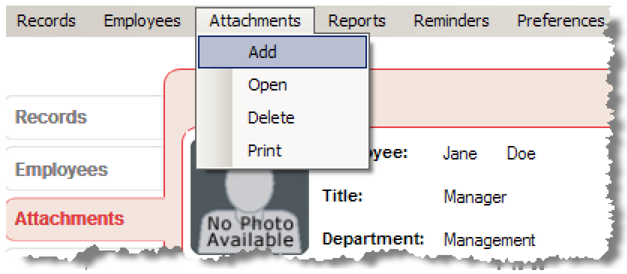
In any of the Gradience Basics applications, you can set ***reminders*** for yourself that will be displayed on the right side of the application at all times. You can create, dismiss or delete Reminders via the **Reminders** tab (shown below):

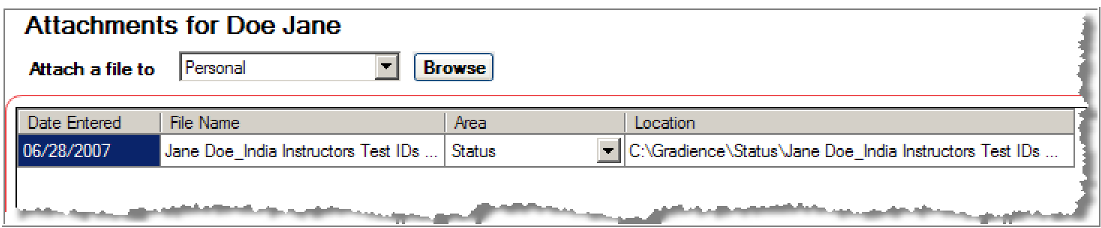

Time Clock
Employees
Export Payroll
In/Out Board
Reports
Reminders
Preferences
Reminder Setup
Title:
Employee Awards Ceremony
Details:
Don't forget to order the certificates for the Employee Awards Ceremony.
Reminder Date:
07/20/2007
Add
Save
Cancel
Delete
Dismiss
Reminder Queue
All Active
Past Due
Next 7 Days
Dismissed
Date
Title
7/16/2007
Carla Birthday
7/20/2007
Employee Awards Ceremony

# Working with Records Attachments

### Attaching Files to an Employee Record

The Attachments tab lets you attach several different files to an Employee's record. The attachment is saved to a specific Folder Area. For example, a resume would be attached to the Personal Area but a list of Emergency Contacts would be saved to the Emergency Contact Area.




### Usage

There are multiple things you can do with Attachments. Shown below are the common work process flows.

### Using the Menu

1. Select the **Attachments** menu.
2. Click **Add** to open a browse dialog to attach the file.
3. Browse to the location of the file to be attached and select the file.

### Using the Attachments Tab

1. Click the drop-down arrow next to **Attach a File to** and select the area for the file to be attached.
2. Click **Browse**. This will open a browse dialog to attach the file.
3. Browse to the location of the file to be attached and select the file.

### To Open an attachment

1. Click on the Attachments tab.
2. Select the Employee for whom you would like to open the file.
3. Click on the file and select Open.

### To Print an attachment

1. Click on the Attachments tab.
2. Select the employee for whom you would like to print the file.

3. Click on the file name and select Print.

**To Delete an attachment**

1. Click on the Attachments tab.
2. Select the Employee for whom you would like to delete the file.
3. Click on the file and select Delete.
4. Click Yes on the delete confirmation dialog box.

**To Move an attachment**

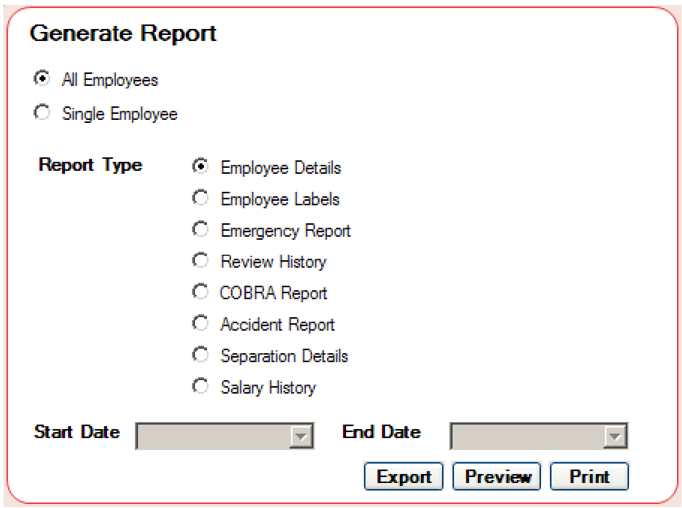
1. Click on the Attachments tab.
2. Select the Employee for whom you would like to move the file.
3. Click on the file.
4. Click on the drop down box under "Area" and select the new location.
5. Click OK.

# Records Reports

**Generating a Records Report**

There are eight (8) Records reports that end users can generate, shown in the graphic below. All reports are related to important recordkeeping functions, and are created using **Crystal Reports.** Crystal Reports and the associated viewer that appears after you click the Preview button provide some nifty features. One such feature is the ability to double-click certain data elements displayed inside the viewer window, allowing for a "drill down" look into the selected data.

***Generate Report window in Gradience Basics***




**Usage**

This section allows you to generate, print and/or export a detailed report for a specific date (depending on report type) .

1. Select the employee report type (Single Employee or All Employees).
2. If you choose Single Employee, select the Employee name from the resultant drop list.
3. Choose the Start Date by clicking on the drop list calendar.
4. Choose the End Date by clicking on the drop list calendar.
5. Select either Export, Preview or Print.

The ***EXPORT*** button will export the report to a selectable format (PDF, XLS, RTF, or HTM for Records).

The ***PREVIEW*** button will launch a pop-up window previewing the output report. Remember to try the "drill down" feature ... hover over an area of text, and if you see either a hand icon or a magnifying glass, this data element can be "expanded" into a mini-report of its own. Also remember that from within the Crystal Reports viewer you can export the "preview data" to many different reports, including Excel spreadsheets, Word docs and Adobe Acrobat PDFs.

The ***PRINT*** button will print the document.

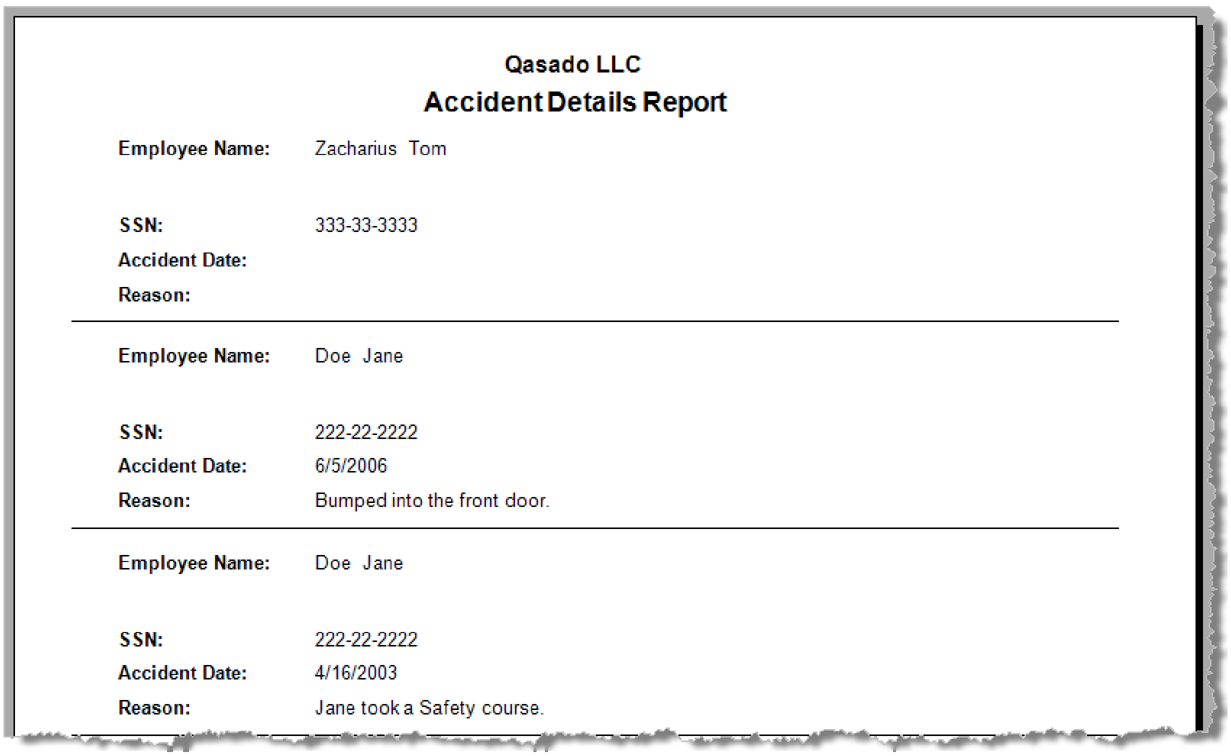
# Accident Report

**About the Accident Report**

The Accident Report was designed to provide a brief list of details related to employee accidents.  As with most reports, the output can be generated for either All Employees or a Single Employee. When selecting a **Single Employee**, a drop list will appear and allow you to select a specific employee from the list.

Data fields

| Available Fields | | | |
|---|---|---|---|
| First Name<br>Last Name<br>SSN<br>Accident Date<br>Reason | | | |
| | | | |



Qasado LLC

**Accident Details Report**

| | |
|---|---|
| **Employee Name:** | Zacharius  Tom |
| **SSN:** | 333-33-3333 |
| **Accident Date:** | |
| **Reason:** | |
| **Employee Name:** | Doe  Jane |
| **SSN:** | 222-22-2222 |
| **Accident Date:** | 6/5/2006 |
| **Reason:** | Bumped into the front door. |
| **Employee Name:** | Doe  Jane |
| **SSN:** | 222-22-2222 |
| **Accident Date:** | 4/16/2003 |
| **Reason:** | Jane took a Safety course. |

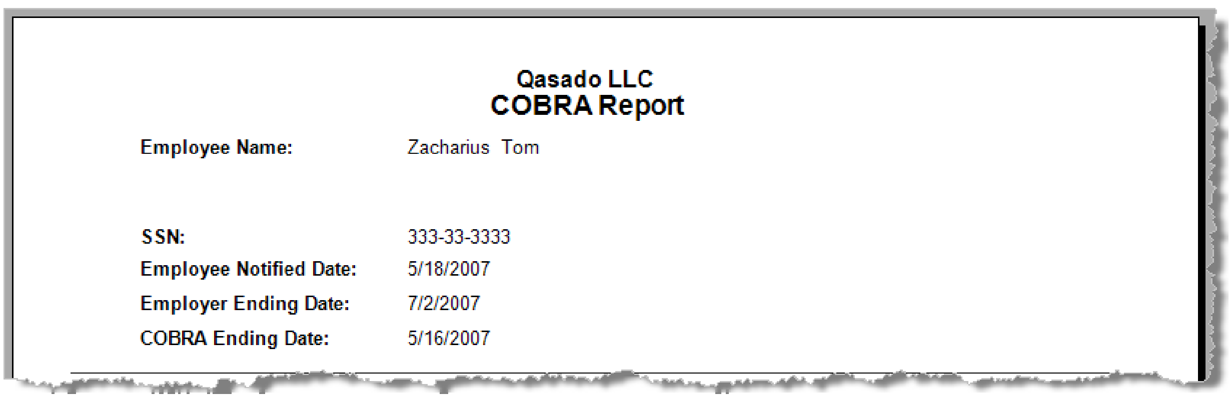
# COBRA Report

**About the COBRA Report**

The COBRA Report is designed to help the Administrator keep track of COBRA-related employee information such as the Benefits Ending Date(s), date the employee was notified of his/her COBRA rights, and the employee's response (Accepted, Rejected or No Response). COBRA information can be entered via the **Insurance/Benefits** folder thumbnail (click the edit hyperlink) or the **Insurance/Benefits** detailed overlay inside Gradience Basics Records.

Show me a list of the fields

| COBRA Report Fields |
|---|
| First Name |
| Last Name |
| SSN |
| Employee Notified Date |
| Employer Ending Date |
| COBRA Ending Date |



Qasado LLC
COBRA Report

| | |
|---|---|
| **Employee Name:** | Zacharius Tom |
| **SSN:** | 333-33-3333 |
| **Employee Notified Date:** | 5/18/2007 |
| **Employer Ending Date:** | 7/2/2007 |
| **COBRA Ending Date:** | 5/16/2007 |

# Emergency Contact Report

**About the Emergency Contact Report**

The **Emergency Contact Report** is designed to provide information to the Administrator on the selected employee's Emergency Contact details. You can affect fields related to this report by finding the **Emergency Contact** folder thumbnail on the **Records** tab.

Data fields

| Emergency Contact Report Fields |
|---|
| **First Column** |
| First Name |
| Last Name |
| SSN |
| Status |
| Department |
| Supervisor |
| Title |
| **Second Column** |
| Name of Emergency Contact |
| Relationship |
| Address of Emergency Contact |
| City, State, Zip info for Emergency Contact |
| Day phone for Emergency Contact |
| Night phone for Emergency Contact |

**Usage**

See the Reports tab topic for information on how to generate a report.

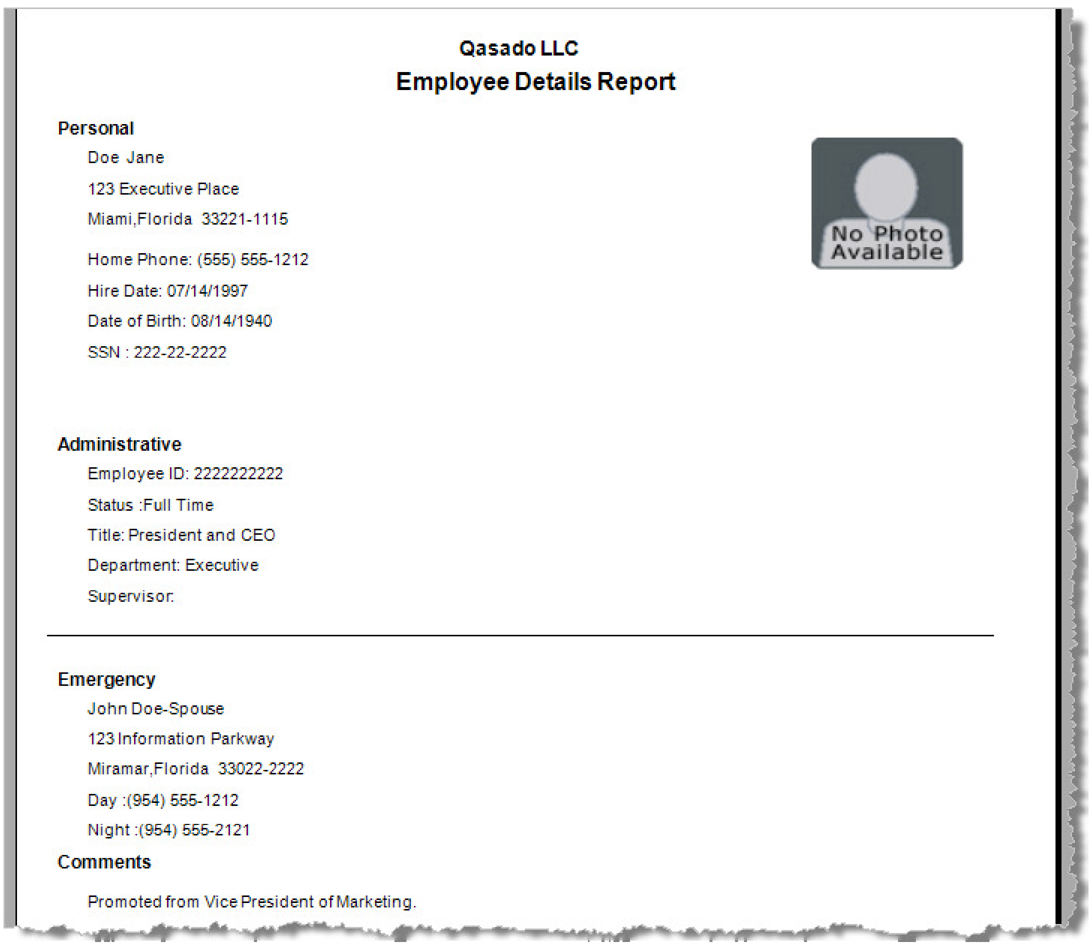
# Employee Details Report

### About the Employee Details Report

The Employee Details report is one of Records Basics primary reports in that Administrators will find the report useful to generate on a regular basis. This report is divided up into four sections: **Personal**, **Administrative**, **Emergency** and **Comments**. Here is what the generated report looks like:

Data fields

| Personal | Administrative | Emergency | Comments |
|---|---|---|---|
| First Name | Employee ID | First Name | Additional Information |
| Last Name | Status | Last Name | |
| Address | Title | Relationship | |
| City | Department | City | |
| State | Supervisor | State | |
| Zip Code | | Zip | |
| Home Phone | | Day Phone | |
| Hire Date | | Night Phone | |
| Date of Birth | | | |
| SSN | | | |


Qasado LLC
Employee Details Report

Personal
Doe Jane
123 Executive Place
Miami,Florida 33221-1115
Home Phone: (555) 555-1212
Hire Date: 07/14/1997
Date of Birth: 08/14/1940
SSN : 222-22-2222

No Photo Available

Administrative
Employee ID: 2222222222
Status :Full Time
Title: President and CEO
Department: Executive
Supervisor:

Emergency
John Doe-Spouse
123 Information Parkway
Miramar,Florida 33022-2222
Day :(954) 555-1212
Night :(954) 555-2121

Comments
Promoted from Vice President of Marketing.

### Usage

Steps for creating reports can be found in the topic Reports Tab.

# Employee Labels

**About the Employee Labels Feature**

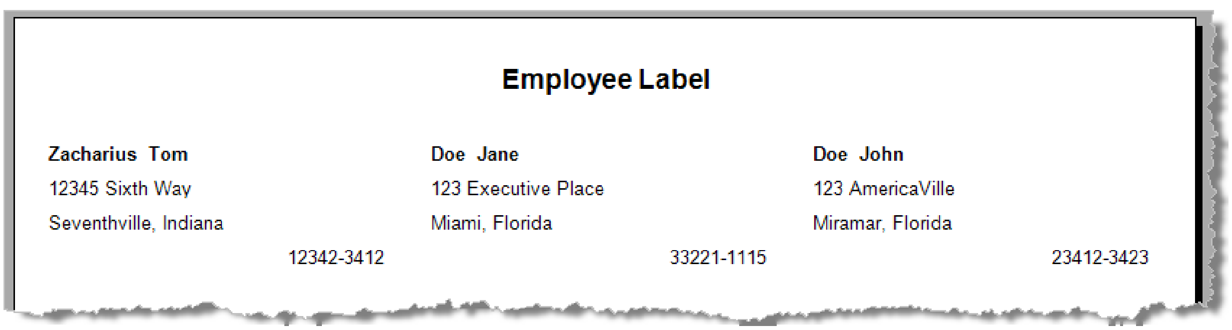
The **Employee Labels** report was designed to allow users a way to easily create mailing labels for either a single employee or all employees in the organization. If you use Avery labels in your organization, the Avery label name is Return Address, and the Avery Label number as referenced by Microsoft Word 2003 is 3261R – ¾” X 2 ¼” (0.75” X 2.25”). The 3261 label series is designed to print 30 labels per page.

When you print labels for All Employees versus a Single Employee, you get a slightly different label set. The graphics below show how **All Employees** labels are printed (from left to right across the label sheet, three (3) horizontal labels on a row) versus how **Single Employee** labels appear (the same employee shows up multiple times, horizontally, with three (3) labels per row).

Data fields

| Employee Labels Fields |
| --- |
| First Name |
| Last Name |
| Address |
| City |
| State |
| Zip Code |

***All Employees Label Sample***




***Single Employee Label Sample***

**Usage**

See the Reports tab topic for details on how to generate a report (or in this case, labels).

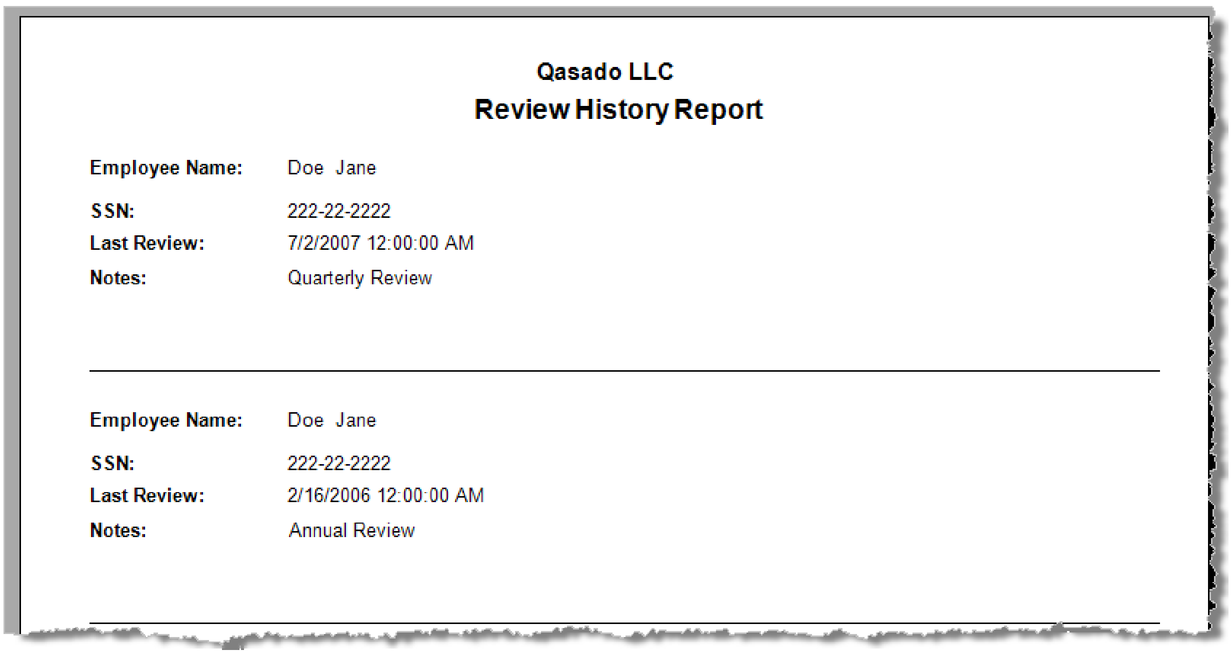
# Review History Report

**About the Review History Report**

The **Review History** report was designed to provide a way to examine in one place the review history for individual employees. Fields displayed in the **Review History** report come from the **Performance Appraisals** section on the **Employees** tab.

Data fields

| Review History Report Fields |
|---|
| First Name<br>Last Name<br>SSN |



Qasado LLC

Review History Report

| | |
|---|---|
| **Employee Name:** | Doe Jane |
| **SSN:** | 222-22-2222 |
| **Last Review:** | 7/2/2007 12:00:00 AM |
| **Notes:** | Quarterly Review |

| | |
|---|---|
| **Employee Name:** | Doe Jane |
| **SSN:** | 222-22-2222 |
| **Last Review:** | 2/16/2006 12:00:00 AM |
| **Notes:** | Annual Review |

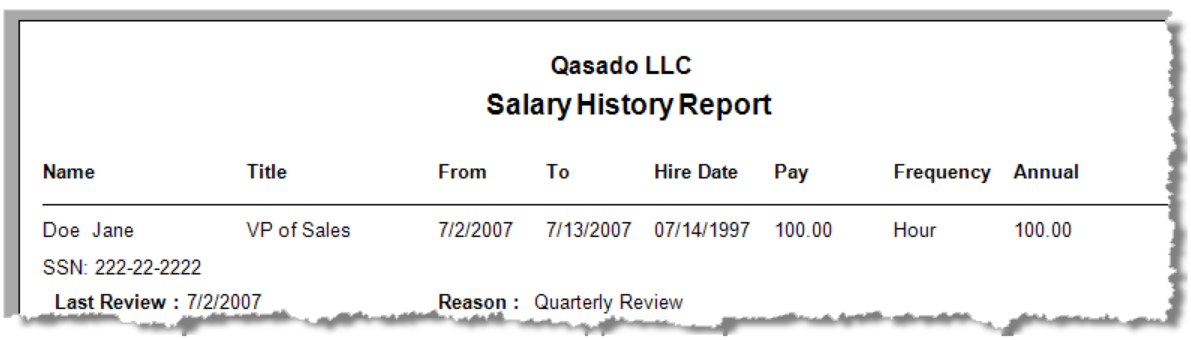
# Salary History Report

**About the Salary History Report**

The **Salary History** report was designed to provide details on individual employee **Salary History** information. To affect information related to this report, you can use the **Wage/Withholding** folder thumbnail on the **Records** tab or the **Wage/Withholding** hyperlink on the Employees tab to bring you to the **Wage/Salary History** container.

Show me a list of the fields

| Salary History Report Fields |
| --- |
| First Name |
| Last Name |
| Title |
| From Date |
| To Date |
| Hire Date |
| Pay |
| Frequency |
| Annual |
| SSN |
| Last Review |
| Reason |



Qasado LLC

Salary History Report

| Name | Title | From | To | Hire Date | Pay | Frequency | Annual |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Doe Jane | VP of Sales | 7/2/2007 | 7/13/2007 | 07/14/1997 | 100.00 | Hour | 100.00 |

SSN: 222-22-2222

**Last Review :** 7/2/2007 **Reason :** Quarterly Review

**Usage**

See the Reports tab topic for details on how to generate a report.

# Separation Details Report

### About the Separation Details Report

The **Separation Details** report was designed to provide details regarding employee's separations (defined as an employee leaving the company for any of a variety of reasons) for individual employees.

Data fields

| Separation Details Report Fields |
| --- |
| First Name |
| Last Name |
| SSN |
| Separation Type |
| Separation Reason |
| Separation By |
| Eligible for Rehire |

### Usage

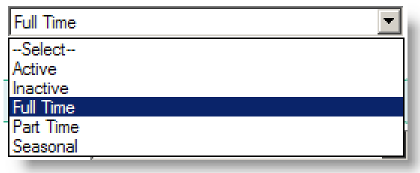
See the Reports tab topic for details on how to generate a report.

# Change Status

**The Status Field**

Although there is no "deeper" functionality behind the Status field, you will want to select a Status type from the drop list to make sure your Attendance reports are correct. For example, it would be useful when running the Transaction Details report to identify all Full Time employees from all Part Time or Season employees, and then you can collate and distribute those reports accordingly.

The drop list items appear in the graphic below:




**Usage**

In Basics Attendance, navigate to the Employee tab and look for the Status drop list, then make the selection of your choice as shown in the process below:

1. Click the drop down list next to Status.
2. Select the desired Status item.
3. Click Save to save the record.

# Welcome Screen

### Concept

### About the First Run State Balloons

A concept we call the "First Run State" is designed to show you, via a few Help balloons, some tips and helpful hints on what it takes to perform "initial setup" of Gradience Basics. These setup balloons show up on the Employee Calendar tab and let you know about the program, some hints on how to use it, and information on filling out required fields. Before you proceed, please read the balloons in their entirety. The Help balloons will only show up one time, and after that they do not return.

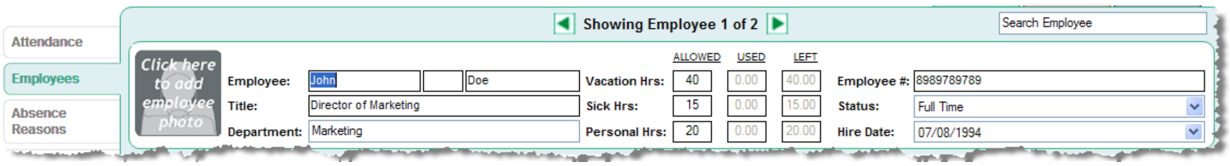
### Usage

You will encounter **First Run State** windows upon first running any of the Gradience Basics applications. Since the First Run State consists of just a few informational balloons, designed to inform the user on steps they should take to successfully create their first employee record, there is no "step by step" to using them.

# Using the Employees Tab

### The Employees Tab - Main Container

All Gradience Basics applications have an Employees tab, designed to allow for quick data entry of the most common information needed for employees. To enter data in any field, just click in the field, type or select the information you want, and then click Save to commit your changes to the database.




### Employees Tab Differences Between Attendance - Records - TimeClock

Across the Gradience Basics applications, synchronicity is key. Assuming you own more than one of the Gradience Basics applications, you will see as you navigate between them how similar each of them is in key features. The Employees tab is no different - each tab has a very similar look and feel, but there are a few differences.

On the Employees tab (Main Container), you always will see the **Employee**, **Title** and **Department** fields on the left and **Employee #**, **Status** and **Hire Date** on the right. Where the changes occur are in the middle of the container where each application has three different fields specific to the module.

Attendance has **Vacation Hrs, Sick Hrs** and **Personal Hours** (along with the Allowed, Used and Left columns) in the center. This is where you'll enter the number of hours employees are permitted to take under your business plan.

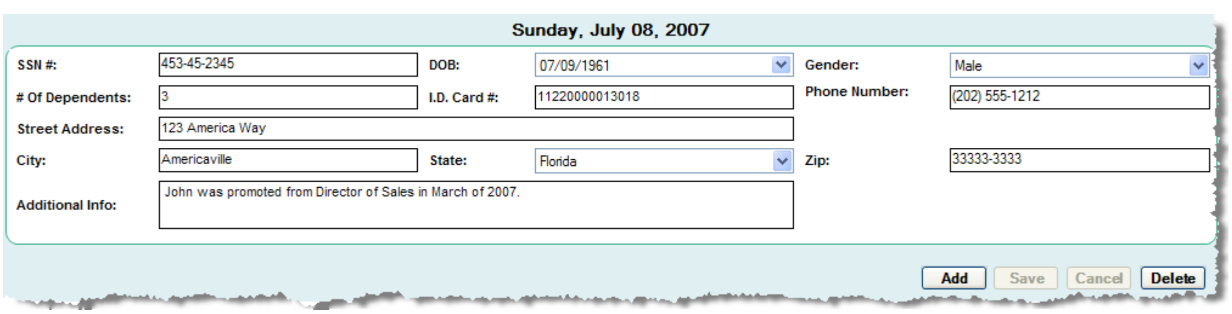
Records has **Supervisor, Wage Type,** and **Source of Hire** as the center fields.

TimeClock has **Pay Period Regular**, **Pay Period Overtime** and **Pay Period PTO** as center fields. Here you have an overview of the time an employee has on the clock.

### The Attendance Employees Tab - Bottom Container

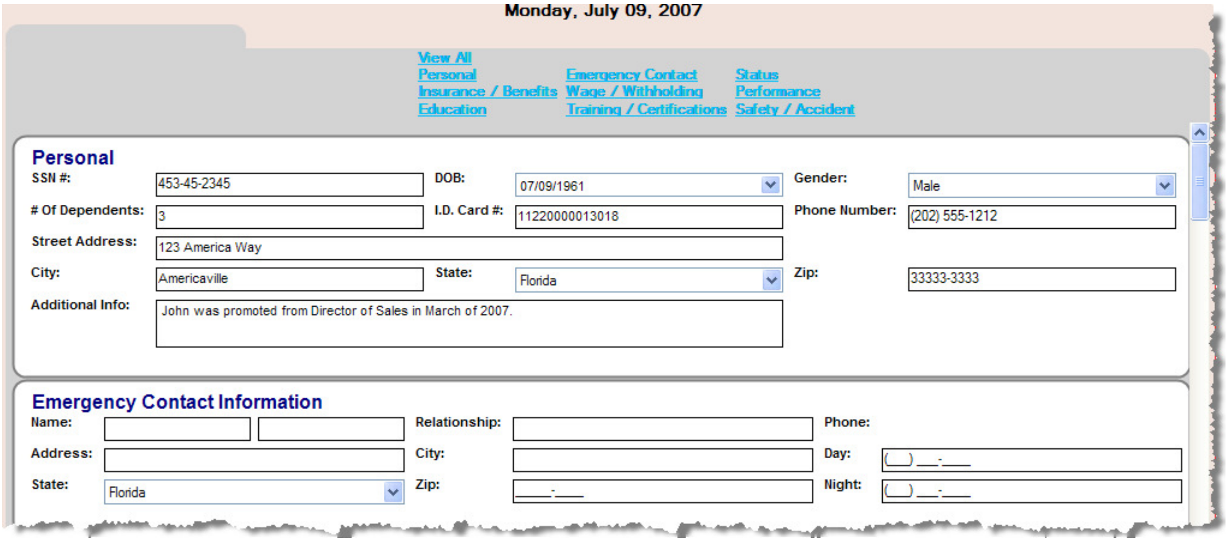
In addition to the differences in the Main Container, the Bottom Container (everything below the Main Container) has differences as well. These are more dramatic, depending on the application.

Although the most important information is captured in the Employees tab Main Container, vital information still is required before the employee's basic setup can be considered complete. Because of the need to capture this additional information, all modules have a Bottom Container that meets this need. The addition of these fields to the set available for each employee greatly enhances the ability of the application to handle current and future information needs (shown below):




### The Records Employees Tab - Bottom Container

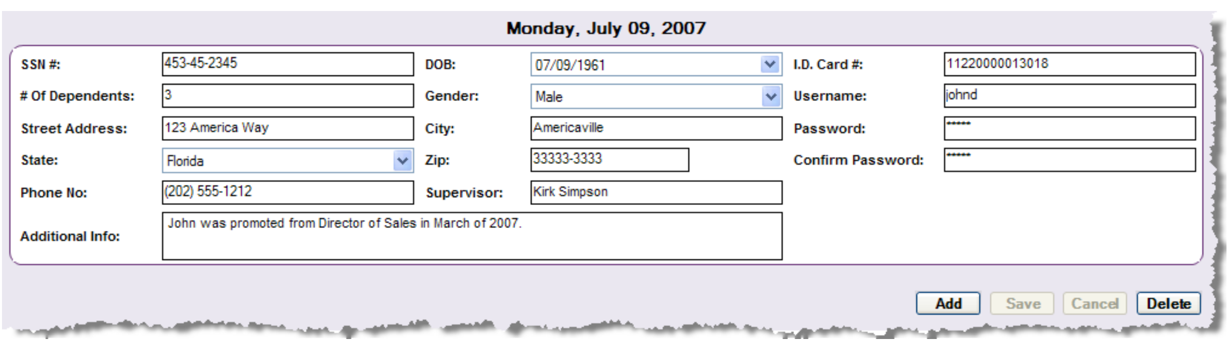
In Records, instead of just a single container, there are numerous containers that have a very large set of fields available for you to enter additional information for your employees. Once you have arrived on the Records tab, find and click the **View All hyperlink** to see the complete list of containers (a part of which is shown in the graphic below):




**The TimeClock Employees Tab - Bottom Container**

In TimeClock, the Bottom Container is much like the one in Attendance Basics. Similar fields allow you to capture a complete picture of the employee's critical information but with some important additions. Because TimeClock often is used in conjunction with Time Station (the software installed at another workstation which gives the employee the ability to "swipe in/out" using a magnetic card reader or clock in/out using a keyboard remotely) the fields in the container's right side are dedicated to Time Station setup and configuration. For more information, visit the Using TimeClock with Time Station topic.

The Time Station-related fields include I.D. Card #, Username, Password, and a Confirm Password field.



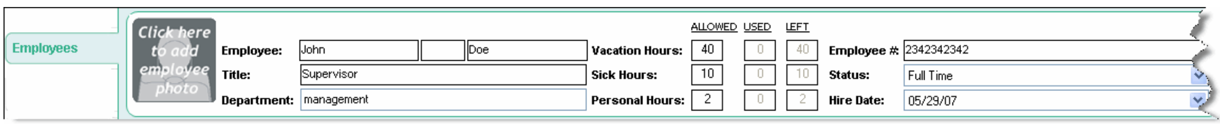
# The New Employee Process

**The New Employee Process**

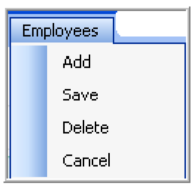
Start by navigating to the Employees tab. From here, examine the fields on the form. You can fill out as few or as many as you wish but with a few exceptions: the First Name, Last Name, and Hire Date fields are mandatory, as well as the SSN # field (not shown, but located in the bottom of the container).

**Usage**

The Employee Area cutout below shows the area where users will add new employee information:




The Employees menu item shows the "Add" button used to perform the same task:




**How to use the two methods**

**Using the Employee Area controls:**

1. Click the Add button, or start by entering data into the blank fields.
2. Enter the required employee information in the Employee Area fields.
3. Click Save.

**Using the Menu:**

1. Click the Employee menu item.
2. Click Add.
3. Enter the information in the Employee Area.
4. Click Save.

**Note:** Initially, the entry fields are in a blank state but the Photo field is always editable. After information is entered, the Save button must be clicked to retain the entered information, however, if you click the left or right progressive directional arrows which sandwich the **Showing Employee X of Y** label, a dialog will prompt you to save changes.

# Creating Your First Employee

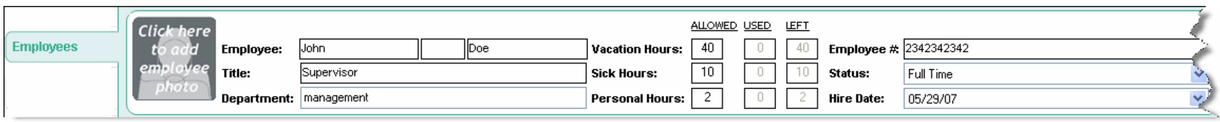
Creating your first employee is an easy process to help you start getting more from your Gradience product.

1. Navigate to the **Employees** tab and click **Add** to create a new record. Or, you can select **Add** from the **Employees** main menu.

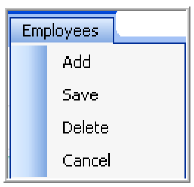
2. Enter any information you have on the employee (for XP users, required Fields are marked in a blue background the first time you run the program, and if you miss one of them, a popup message will appear instructing you to complete the required fields).

3. Click **Save** to create your new employee.

The Employee Area graphic shown below indicates the areas where you will add new employee information:




The image shown below is that of the **Employees** tab on the main menu bar.




**Important:** The **Hire Date** field has special significance in Basics Attendance.

If you set a Hire Date incorrectly, or leave the default date, which is usually the date you installed the application, you will NOT be able to drag and drop Absence Reasons onto the Employee Calendar for any dates before the Hire Date. This feature is designed to help you avoid making the mistake of dropping Absence Reasons onto dates before the employee's date of hire.

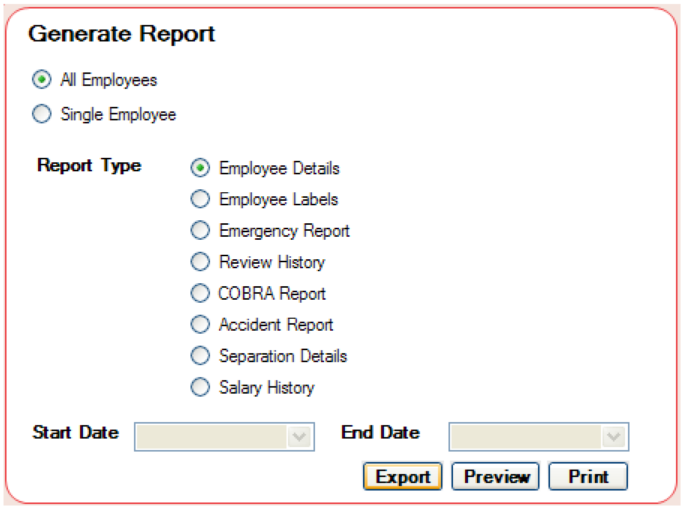
To avoid problems later, make certain you remember to fill out the **Hire Date** field with the employee's ***actual*** Date of Hire information.

# Reports Tab

### Generating Reports

There are two ways you can generate a report: through the Reports tab or by using the Reports main menu item. In either case, you still generate reports from the Reports tab, and a special container on the tab helps you create the report you need. This container allows you to export, preview, or print a detailed report customized via the Report Type selection.

### Basics Records Reports




### Usage

The steps below describe how to generate a report. For each one, you will need to choose a **Report Type**, and that's where the choices among the three applications diverge into their areas of expertise.

For example, in Basics Attendance you have a Report Type called "Calendar Report" that does not appear in Records, but in Records you have a Report Type called "Emergency Contact" that does not appear in Attendance, and so on. Each module contains from two to eight reports available for immediate use. Follow the steps below to generate a report:

1. Choose whether the report will be generated for a Single Employee or for All .
2. If you choose Single Employee, select the name.
3. Select the Report Type.
4. Choose the Start Date by clicking on the calendar on the right.
5. Choose the End Date by clicking on the calendar on the right.

The ***EXPORT*** button will export the report to a selectable format (PDF, XLS, RTF, and HTM).

The ***PREVIEW*** button will launch a pop-up window previewing the output report. Remember to try the "drill down" feature ... hover over an area of text, and if you see either a hand icon or a magnifying glass, this data element can be "expanded" into a mini-report of its own. Also remember that from within the Crystal Reports viewer you can export the "preview data" to many different reports, including Excel spreadsheets, Word docs and Adobe Acrobat PDFs.

The ***PRINT*** button will print the document.

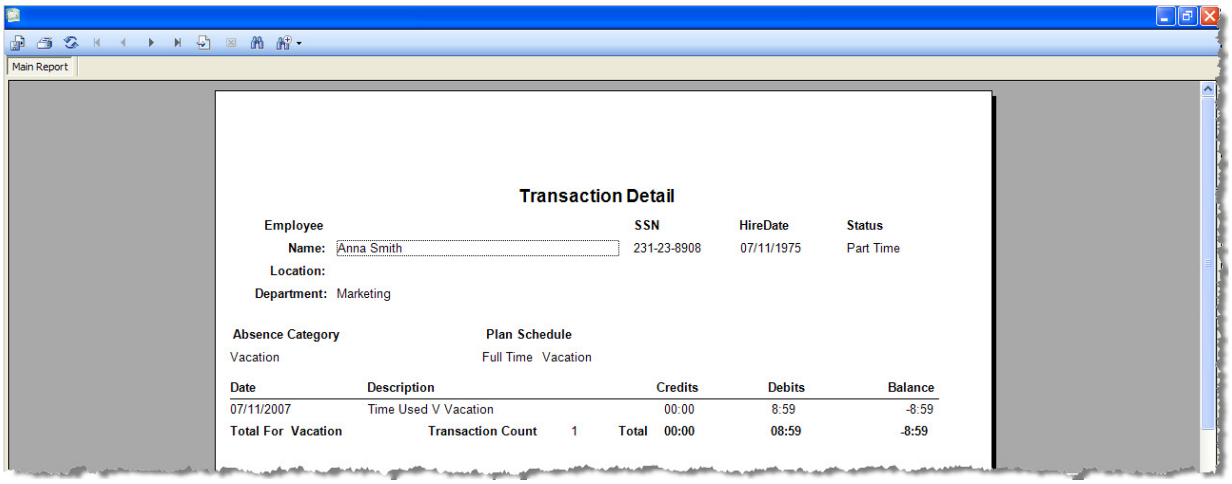
# Previewing Reports

### How to Use the Preview Feature

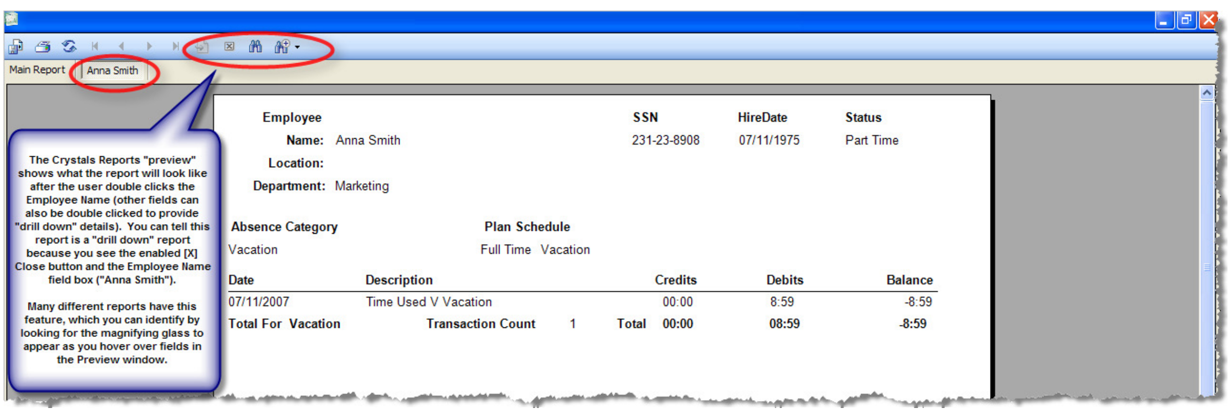
The Gradience Basics Preview feature found in all Reports tabs gives you the ability to preview a report for accuracy before exporting or printing the data. Using Crystal Reports as the engine, the Preview button takes you to a window where the report can be manipulated and viewed in several ways.

In the Basics Attendance sample Transaction Detail report shown below, notice that the **Employee Name** field has a dotted rectangle around the field data. By double-clicking the field data (in this case, the name Anna Smith), you can view (or "drill down into") more detail related to this specific employee.

***Transaction Detail Sample Report using Preview button***




Transaction Detail Sample Report "Drill Down" View




### Usage

To use the **Preview** feature, perform these steps:

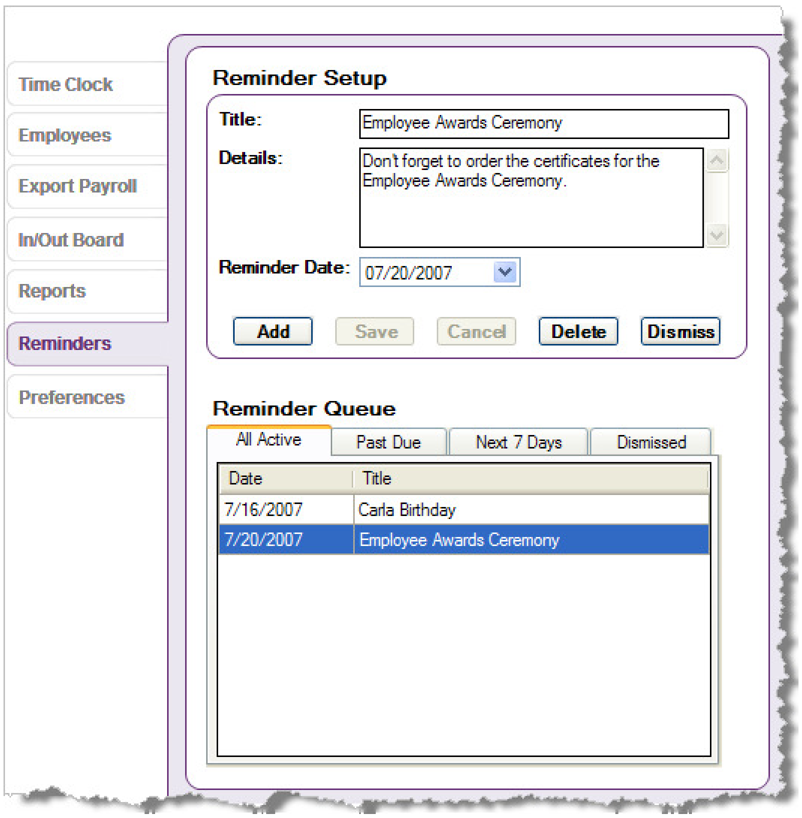
1. Navigate to a Reports tab inside any Gradience Basics application.
2. Create a report, selecting any fields and parameters you wish.
3. Click the Preview button. The Crystal Reports preview engine will display the report and allow you to review the contents before you perform an **Export** or **Print** operation.

# Using the Reminders tab

**How to Schedule a Reminder**

Reminders are an important part of daily activities for Attendance administrators and other HR personnel. Reminders are not designed to be specific to individual employees, but instead were designed for use by you, the Administrator. You can make a reminder for anything and everything, but common uses might be to provide a way to keep up to date with special HR-related employee activities such as Scheduled Reviews, Evaluations, or Appraisals, or for more mundane (and fun) tasks such as reminding yourself to prepare for the monthly Employee Luncheon. No matter how you use it, you should find Reminders useful.

***Reminder Setup Window***




**Usage**

Again, Reminders are global and not related to any specific employee. Here are the associated steps:

**Adding New Reminders**

1. Click the Add button on the Reminder Setup area.
2. Type in the Title.
3. Type in the Details.
4. Select the Event Date from the drop list.
5. Click Save.

**Editing Reminders**

1. Double-click on the reminder in one of the tabs of the Reminder Queue area.
2. The reminder will be shown on the Selected Reminder area, where you will be able to modify the information.
3. Type in the Title.

4. Type in the Details.
5. Select the Event Date from the drop list.
6. Click Save.

**Deleting Reminders**

1. Select the Reminder by clicking on the title in one of the tabs of the Reminder Queue area.
2. Click the Delete button.

**Dismissing Reminders**

1. Select the Reminder by clicking on the title in one of the tabs of the Reminder Queue area.
2. Click the Dismiss button.
3. The dismissed reminder goes automatically to the Dismissed Tab.

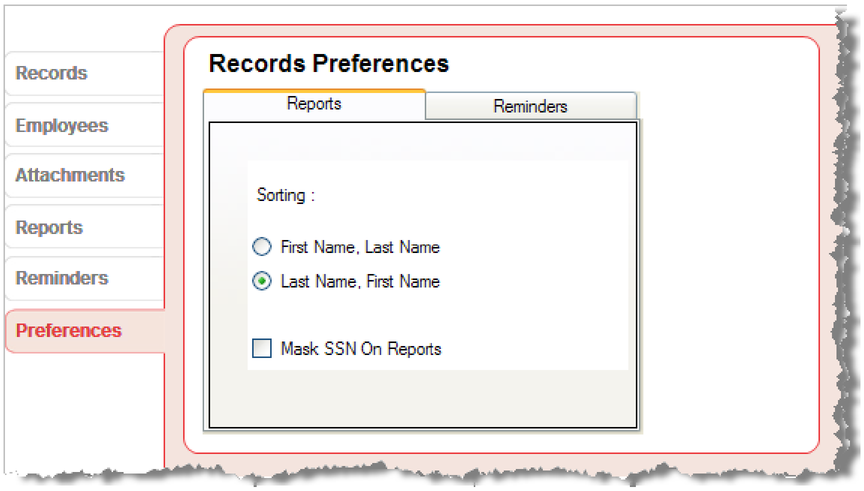
**Note:** The Reminder also can be dismissed by clicking the Dismiss button in the Reminder window.

# Preferences Tab

**Setting Preferences**

Each Gradience Basics application has a Preferences tab, and each of them has slightly different options. In the Usage section you can view steps for setting preferences for the various applications. Below are screen shots of the **Preferences** tabs for the three Gradience Basics products:

**Records Basics Preferences Tab**




**TimeClock Basics Preferences Tab**

**Usage**

Select your preferences.

***Records Preferences***

Choose your preferences for the Reports and Reminders.

*Reports*

Select the Reports Tab

This preference allows you to change the alphabetical order preference from the default (first name then last name) to the reverse (last name then first name). You also can choose to suppress Social Security numbers from here.

*Reminder*

Select the Reminder Tab

This section allows you to select the front tab to be shown on the Reminder Queue.

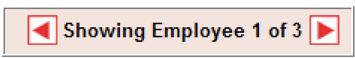
- All Active
- Past Due
- Next 7 Days
- Dismissed

# Manual Record Scrolling

**Scrolling Through Employee Records**

Near the center of the screen are two arrows, one pointing left and the other pointing right, sandwiching a message called **Showing Employee X of Y.** The letters **X** and **Y** represent (respectively) the current numbered employee out of the total number of employees in the database. Clicking either of the two arrows either decrements (left arrow) or advances (right arrow) to the previous or next employee in the database.

***Left and Right Progressive Directional Arrows in Records***




**Usage**

There are really two ways to move around and find employees - the solutions are the use of a [Search Employee text box]() or via the progressive directional arrows, also known as the "manual scroll bars," which we show above. To use the directional arrows, users can follow these steps:

1. Access the **Employees** tab.
2. Find the **left** and **right** directional arrows next to the words showing the employee numerical order ("Showing Employee 1 of 25") near the top center of the window.
3. Activate either the right directional arrow to scroll forward or the left directional arrow to scroll back.

**Note:** When clicking the left or right arrows, the right arrow is for ascending operations and the left arrow is for descending operations. When the user reaches the highest number in the range, the numerical ticker goes back to 1 and starts at the first record entered in the system.

# Search Employee

### How to Search for an Employee

A feature we call **Instasearch** is used to search for employee records. Instasearch is based on Microsoft technology called "Instant Search" and features the ability to quickly locate and display search results as the user types characters into the box. To get started, find the Search Employee box near the colored module names in the application's top right side:


### Usage

This section allows you to search an employee by name or a portion of the name.

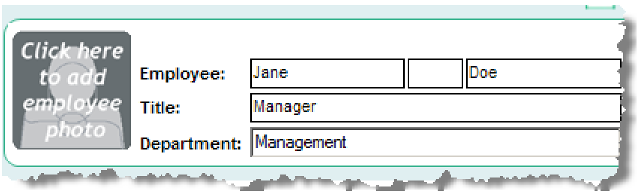
1. Type in the name of the employee or portion of either the First name or the Last name inside the Employee Search field.
2. As you type, Gradience Basics searches for and displays employees based on the text entered.
3. Once you have the desired employee record, you can click outside the Search box and edit or update the record.

**Note: This feature works on both Windows XP and Windows Vista.**

# Upload Employee Photo

### Upload Photo

Each Employee Area inside Gradience Basics includes the ability to Upload a Photo for each employee. Just click the icon labeled, "Click here to add employee photo" on the employee tab and select a photo from your computer. After you click Open, the photo will appear inside Gradience Basics.




### Usage

The process to upload an employee photo is described below:

1. Click on the photo icon.
2. The standard Windows browse dialog will appear.
3. Browse and select the photo.
4. Click OK. The photo is automatically saved.

### Remove a Photo

The process to remove an employee photo is simple: right-click the photo or photo icon and select **Remove**. The picture is removed instantly.

# Backup and Restore

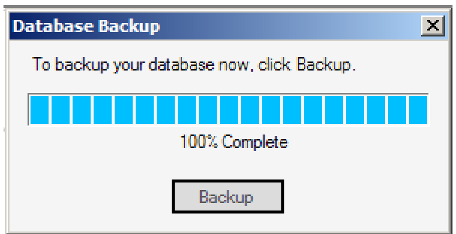
**Backup and Restore Your Database**

Gradience Basics allows you a quick method to backup your Microsoft SQL Server Express SP2 database via the **Backup** and **Restore** feature.

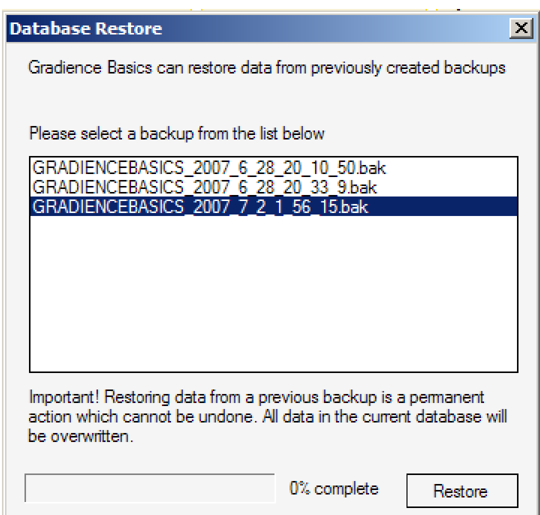
From the main menu, find and click **Data**. There are two options, **Backup** and **Restore**. To backup your data, select Backup. If you already have backed up your data, then you click Restore if you need to bring the data back.

**Note:** Restoring your data COMPLETELY wipes out the current database! There is no "fail-safe" or other method to store what you currently have, except to make a backup before performing a restore. We highly recommend backing up your current database before restoring a previous database (better to be safe than sorry).

**Backup**




**Restore**




**Usage**

From the Data menu, select either Backup or Restore. The prompts and buttons are simple and easy to follow from here.

**To Backup Data**

1. Click the Data menu item.
2. Select Backup, and the Backup window appears.
3. Click the Backup button to backup your data.
4. Click Close when finished.

**To Restore Data**

1. Click the Data menu item.
2. Select Restore, and the Database Restore window appears.
3. From the list, select a backup data file to restore.
4. Click Restore.
5. Once the data has been restored, Gradience Basics automatically will restart and your restored data is ready for use.

# Color Keys

**About the Color Key Indicators**

Color Keys help you with visual cues regarding items, actions, or activities occurring inside Basics  Records .

In Records, a folder or data field that has been completed by the user has label text marked in dark blue. If items inside a folder are incomplete, a red arrow (or red text) indicates this condition. If a text area is being used as a hyperlink or link to another area, container or data field the color is light blue (aqua).

**Available Color Keys**


**Usage**

The Color Key for each module can be expanded or collapsed using the chevrons appearing in the container's top right.

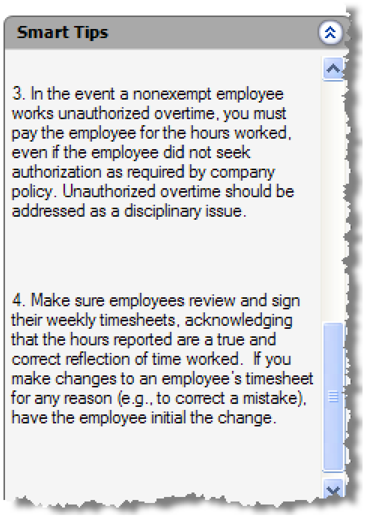
# Smart Tips

**Understanding Smart Tips**

Smart Tips keep you up to date on the latest legal information related to the task you are working on in Gradience Basics. When you begin performing a task related to the Smart Tips database, these tips will appear in the Smart Tips container to the right of your display.

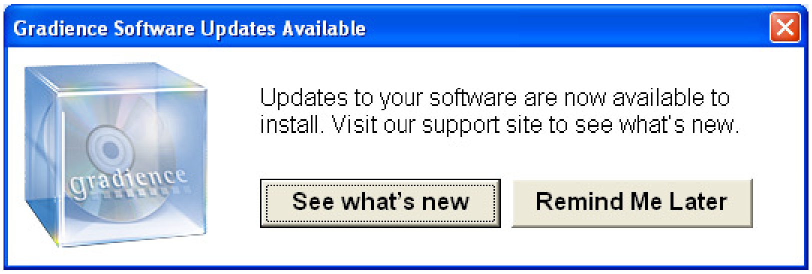
Although many of the tips are legal in nature, not all of them are. Use Smart Tips to help guide you through your daily activities as you work within any Gradience Basics application.

**Note:** You can collapse the Smart Tips containers using the chevron control in the container's top right.



# Auto Update Notification for Gradience Basics  Records

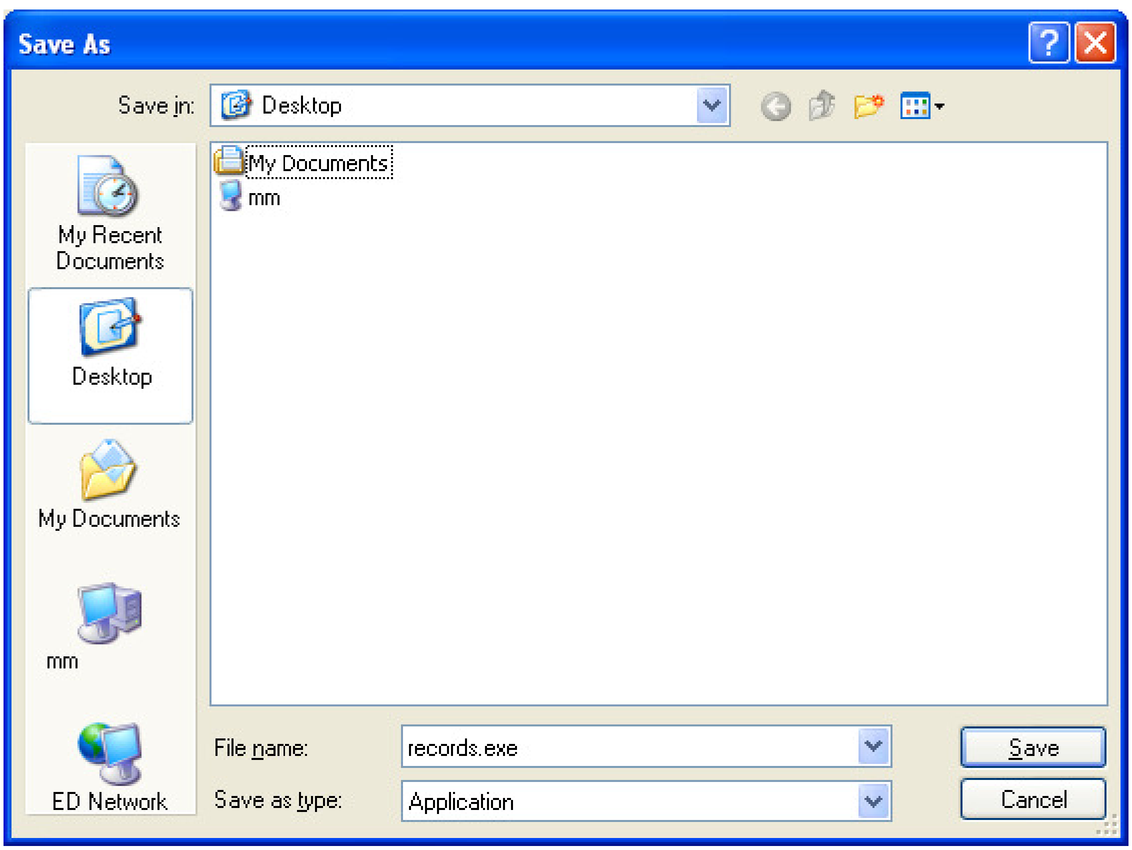
Periodically, FREE updates may become available for this version of Gradience Basics Records.



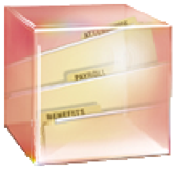

When opening the program; if an update is available, the pop-up shown above will appear.

**Accepting the update:**

1. Click **See what's new** to be directed to the Web page that contains the download link for the program that you need to update.
2. When the pop up window opens; click **Save**. If you click **Run** the software will not install.
3. A Save as window will open. In the **Save** in field enter **Desktop** and click **Save** to download the update.




4. Once the download is complete; an installation icon like the one shown here will appear on your desktop.



**records.exe**

**Installing the update:**

1. Double click the installation icon to begin installing the update. You may also refer to the section on installation in the Help file within your program for more details.

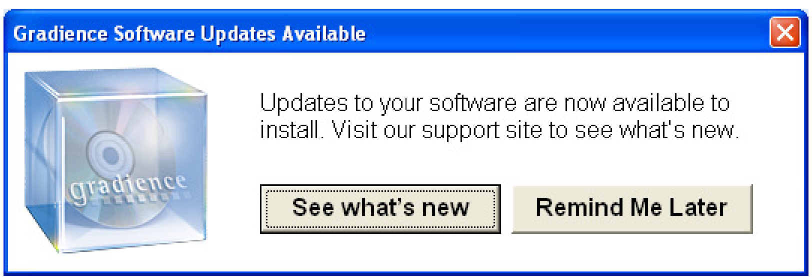
   • **Stand Alone Installation:**You may only install the program on one computer and the data will also be located on that same computer. Double-click on the downloaded installation icon. When a prompt gives a choice between Custom and Express, select **Express**.

2. When the installation is complete, click the original program icon to open the program.
3. From within the program, click **Help > About** to view the updated, multi digit version number.
4. Make a record of this full, multi digit version number. When contacting Tech Support, indicate this number.

**Choosing not to update at this time:**

1. Click **Remind me later**.

**Note**: At any time while using the software, you may click on **Help** at the top. From the drop-down menu click **Check for Updates**. If one is available you will see the pop-up shown here.




If no update is available, the pop-up shown below will appear.