Welcome!

Thank you for choosing Gradience™ Records to track your company's employee information. Our software application includes many features based on the suggestions of our customers, and we certainly welcome any further comments or suggested improvements you may have.

When combined with other Gradience software such as Gradience Attendance and Gradience TimeClock, this powerful tool helps you keep critical employee information without entering data twice.

Software Features:
- Open-ended licensing – Unlike many human resource software applications designed for large companies, Gradience Attendance does not require annual licensing. However, we do encourage you to purchase upgrades so that you have the latest enhancements and newest features to make your job easier.
- Easy, standalone PC installation – We designed Gradience to be simple to install and get running, even for a large client-server system.
- Password security – Anyone who uses the program must have a login ID and password, and you can set different access levels for each user. Additionally, users can encrypt sensitive database data such as Social Security numbers. This feature provides peace of mind in the event a database or server hard drive containing employee information is lost or stolen.
- Data import – If you already have information from a spreadsheet or other program, you can save time setting up Gradience Attendance by importing it.
- Reminders – Set pop-up reminders for important dates, such as employee anniversaries, birthdays and reviews.
- Reports – You can choose from 18 standard reports and change options to get the information you need. Export information to other file formats such as Excel or text, too, as well as build your own reports with the powerful Custom Reports module included.
- Automatic backup – Gradience Attendance can make sure you have a backup of your important employee information each time you close the program. With the included DB Monitor and DB Maintenance utilities, you can also schedule server backups and perform routine database maintenance.
- Unlimited employees – This application lets you manage attendance records and time-off for unlimited employees.
- Automatic Updates – Automatic Updates help you keep your applications current via the Internet. This setting can be manually turned on or off in case automatic updates are not desired.

Gradience Records — New Features:

- **AutoUpdate**** – With the AutoUpdate feature you can set the application for automatic updates or manually check for updates at any time.
- **Expanded Performance, Accidents, Warnings and Separations Features** – These areas now allow you to document more thoroughly than ever with additional information fields.
- **Add file attachments to notes/comments** – Store all documentation in one place! Attach Word, Excel, PDF and image files to any notes or comments field. For instance, you can attach a Gradience Forms™ FMLA Request Form to the comments field of the Benefit Detail screen for that employee. There's also a full text editor available now.
- **Quick print reports** – In each program feature, you'll find a print icon that lets you quickly create related reports. Combined with the new, faster Employee Select Column, this makes printing reports a breeze.
- **Familiar interface design** – No need to re-learn how to use Gradience. For customers using Gradience Records in concert with Gradience Attendance or TimeClock, a single login/password will grant access to all three programs.

**Note: Updates versus Upgrades — Updates (also called minor updates) are new releases where the first version number has not changed. For example, if you purchase a Gradience product with version 10.x.x., you can update to any other version 10.x.x free of charge. Upgrades (also called major upgrades) are indicated by a change in the first version number. For example, when Gradience improves to the next higher first version number (from 10.x.x to 11.x.x), this is called a major upgrade. Major upgrades usually have a significant amount of new features and software improvements which warrant an additional charge. Upgrades require an upgrade fee. When Gradience performs an AutoUpdate, the fixes applied are minor updates, and are available free of charge. Contact Gradience sales for more information on how to purchase major upgrades.

Unlocking the Demo

You can unlock your demo copy after a new installation, or after you already have installed the program.

New Installation

You can unlock your installation immediately, or run any Gradience application in Demo mode. Here's how:
- During the installation of any Gradience application, you will be prompted to enter your license key in the Product Key window.
- Enter the key in the Key field, or click **Next** to continue installing the application to run Gradience in Demo mode.
- After running the applications in Demo mode, you will be reminded periodically of the Demo trial period remaining and have the option to purchase Gradience Attendance, Records or TimeClock.

Previous Installation

If you already have installed the demo of Records, you can unlock it in one of two ways:

1. Open Gradience Records and click **Enter Product Code** to enter the product key.
2. When the **Enter Product Key** window opens, enter your product key. It is not case-sensitive.
3. Click **OK**. A pop-up will indicate whether the key is valid or not.

or

1. Open Gradience Records and click **Continue in Demo Mode**, enter the login and password.
2. From within the program, click **Help**. On the drop-down menu, click **Alter Current Product License**.
3. When the pop-up window opens, click on **Edit Key**.
4. When the **Enter Product Key** window opens, enter your product key. It is not case-sensitive.
5. Click **OK**. A pop-up will indicate whether the key is valid or not.

Note: There is a different product key for each Gradience product.

System Requirements

- Windows XP Professional (SP2), Windows 2000 Professional, Windows 2003 Server or Windows Vista
- Pentium IV or Higher Processor
- 512 MB available RAM (Random Access Memory)
- 60 MB available hard disk space CD-ROM drive
- SVGA monitor with 1024 x 768, High Color or higher
- Windows-compatible, graphics-quality printer

Network Requirements

- **Windows-based Server or PC** – The included database is not compatible with a non-Windows-based operating system, such as Novell. However, you may run the database on a Windows-based server or PC connected to a non-Windows based network.
- **A static (persistent) IP address** so the database will always be connected to the client application.
- **Proper user license** – The database will only allow the purchased number of users to be connected at any one time to the database. **Wide-Area Networks** (WAN) require an Enterprise license. The Product Key is affixed to the inside cover of the **QuickStart Guide.**
- **CD-ROM drive** or access to our software download area on www.gradiencesupport.com.

Citrix and Terminal Services:

Although some of our customers have reported running the Gradience with Citrix we have not tested our software in such an environment. Also, the Gradience technical assistance is only for the applications themselves and not for troubleshooting network issues. We therefore cannot offer help with installation on your Citrix network. We also cannot guarantee that standard approaches to issue resolution offered by our Technical Support team will work in this environment.

You may use the link below to access a PDF that may help.

Citrix support

Below is the only information that we can offer regarding Terminal Services.

Standard Client/Server install on a Terminal Server
Install the gradience product on the Terminal Services Server using the Add/Remove programs in the Control Panel.

 On the Server where gradience is installed, go to **Start**, **Run** and enter: **hrware.ini**. This will bring up Notepad with the following info:
[HRWARE]
Server=Localhost
Path=C:\Program Files\GNeil Software\Data\HRWare.gdb

Change the Server information from:
SERVER=LOCALHOST to SERVER=127.0.0.1.
Even though Localhost is the same as the IP Address of 127.0.0.1, we have found that in many cases you will need to enter the IP Address instead of the name.

We also found that the User would need to be logged on to the Terminal Service with Administrative rights. Without administrative rights, our database engine (Firebird 1.5) will not function, and the user will not be able to access the database file.

This suggests that an Admin user has privileges to system files/DLL's that a standard user would not.

We welcome your sharing with us any insights that you gain from deploying our software on Citrix

License Options

Gradience products have similar licensing schemes. The options currently available are:
- **Professional** – Up to five users can run the program at the same time when connected to a single, common database.
- **Enterprise – Site License** – Any number of users can run the program at the same time when connected to a single, common database from a single site (location).
- **Wide-Area Network (WAN)** – licenses for multiple locations are also available. Please call for more information.

Installing from the CD Menu

To begin installing Gradience, follow these steps:
1. Close ALL running programs.
2. Insert the Gradience CD-ROM into the appropriate drive of your computer.
3. The menu will appear. Select which product you want to install. (If the installation menu does not appear, click **Start**, **Run**. The Run dialog will appear. In the dialog box, type **D:\setup.exe** where **D:** is the letter of your CD-ROM drive. Click **OK** or press **Enter**.)
4. Once the installation procedure begins, follow the on-screen instructions to install the software. See **Setup Types** below for more information. It is recommended that you accept the default setting for each step of the install process. If you are installing the software in a network environment (Client-Server Installation), you should consult your network administrator before installation. You must have proper network rights in Windows 2000 and XP to install Gradience software.
5. When installation is complete, the Gradience program group will be added to your Start menu, and a Gradience TimeClock icon will be on your desktop.

Setup Types

- **STANDALONE**: Use this option if you are installing to a standalone computer. This will install the application files and database files to your local drive.
- **SERVER**: This is the first of two steps in the Client-Server Installation, either for true client-server configurations or a peer-to-peer network that may be using a workstation PC for the database. Choose this option to install the database and application files on the Server and before installing the Client application to PC workstations.
- **CLIENT**: This is the second step in the Client-Server installation. This will install the application files and ask for the Server Name and Database Path.

After clicking on a Setup Type, you will have the following options:
- **EXPRESS**: We recommended that you select this option if you are installing or upgrading Gradience for the first time. This will take you through the installation process with minimum user intervention.
- **CUSTOM**: This option is for Advanced Users who have specific installation needs, such as installing just the Time Station program on a client.

Installing Gradience Records

This section explains how to install Gradience Records to a Network or Standalone computer, and answers frequently asked questions about installing.

Gradience Records can be installed on a single standalone workstation or a network for database sharing among several users, depending on your needs.

Regardless of which license you purchased, you may install the database to a network folder for the purpose of backup. Please consult your network administrator before installing to a network folder.

Network Installation – (Client-Server)

Installing a Client-Server setup is a two-step process. You will need to install to the Server first and then to the Workstation(s).

To install to a network requires these items:
- **Windows-Based Server PC** – <u>The included database is not compatible with a non-Windows-based operating system, such as Novell</u>. However, you may run the database on a Windows-based server or PC connected to a non-Windows-based network.
- **A static (persistent) IP address** so the database will always be connected to the client application.
- **Proper user license** – The database will allow only the purchased number of users to be connected at any one time to the database. Wide-Area Networks (WAN) require an Enterprise license. The Product Key is affixed to the inside cover of the CD sleeve.
- **CD-ROM drive** or access to our software product download area on www.gradiencesupport.com.

NOTE: Gradience cannot provide technical assistance with setting up or maintaining your computer network. Please consult your computer manufacturer or network administrator before contacting Gradience Tech Support.

Installing Gradience

1. You may install from a CD or from a download.

- **From a CD:**
  Insert the gradience CD, select Install gradience software and double-click on the program to be installed.
- **From a Download:**
  After following the instructions on downloading Gradience to your desktop, double-click on the file to install.

  Note: To download, go to www.gradiencesupport.com, *click on* **Download latest versions**. *Select the program that you need, click* **Download** *and then click* **Save**. *When the* **Save as** *window opens, put* **Desktop** *in the* **Save in field** *and then, click* **Save**.

2. You may install as a **Server**, a **Client** or a **Stand Alone**.

- **Server Installation:**
  If installing several gradience programs on your network, only one program needs to be installed at the server.

  When prompted for the type of installation select **Sever**. When prompted for **Custom** or **Express** we recommend **Express**. If you select **Custom** you will be given the chance to "deselect" certain components. We recommend that you leave all components checked. The next prompt will allow you indicate where you want the database to reside. Please indicate a folder on physical drive rather than on the drive directly. An example of a custom path would be…

  j:\gradience\hrware.gdb

  Continue to follow the prompts. You will see a screen that shows where the database is located. Jot this location down or print this screen as prompted. You will use it at the client to verify that it is "pointed" properly to the database.
- **Client Installation:**
  DO NOT map a drive from the client to the server. Our software uses TCP/IP to connect to the database via port 3050. Also DO NOT use UNC (\\) in either the name of the server or the path to the database.

  When prompted for the type of installation select **Client**. When prompted for **Custom** or **Express** we recommend Express. This workstation will look across the network and "self-point" to the data up on the server. A prompt will indicate where this client is "pointed". The client MUST be pointed to the exact drive letter on the server where the database is located, not a mapped drive. Be sure that the path to the database does NOT have double back-slashes (UNC) in the path.
- **Stand Alone Installation:**
  When prompted for the type of installation select **Stand Alone**. When prompted for **Custom** or **Express** we recommend **Express**. If you select **Custom** you will be given the chance to "deselect" certain components. We recommend that you leave all components checked. The next prompt will allow you indicate where you want the database to reside. The database must reside on a physical drive and in a folder on that drive rather than on the drive directly. An example of a custom path would be…

  j:\gradience\hrware.gdb

Possible Launch Error:

If after installation, you attempt to open gradience software from a remote location you may encounter an error message. Some remote-access software cannot resolve **Localhost** or the **"name"** of the server that can be found in the **hrware.ini** file of the server, client or stand alone workstation respectively.

Resolution:

1. 1. Remote to the desktop of the PC where you are attempting to open the program. (Server, Client or Stand Alone PC)
2. 2. Click on **Start > Run** and enter **hrware.ini** into the field and click **OK**.
3. 3. Second line from the top, change the "Server Name" or "Localhost" to the IP Address of the computer where the database is located.
4. 4. **Save** and close the NotePad. Re-launch the program. If this fails, "physically" go to that computer to launch it.

IMPORTANT NOTE FOR VERSION 6 AND EARLIER USERS

Gradience does not share the same database with Version 6 or earlier. You will need the Gradience Version of each program to share the database among the three separate programs. For this reason, you also should upgrade each program to the Gradience Version at the same time as ; otherwise, you may create multiple non-synchronized databases.

Quick Note About Peer-to-Peer Installations

A peer-to-peer connection allows you to share information between two computers without the need of a formal client-server connection. **The peer-to-peer connection must be in place before following these instructions**. See your Network Administrator for more details on setting up such a connection.

On the host computer (the one on which you wish the database to reside), follow the instructions for a Server installation. Write down the Server Name and Database Path when prompted.

Note: The Server installation will install both the software application and database files to the host computer. Then install the application as a Client on the other computer that will be sharing the information, entering the Server Name and Database Path when prompted.

Upgrading from Optima or MyBiz to Gradience

Version 7 and early editions of Version 8 utilized InterBase 6 open edition as a database engine. Nearly all PCs now come with hyper threading as a standard feature. Because of this, we no longer employ InterBase 6 because it doesn't work well in a multi-processor or a hyper-threaded environment.

We now use Firebird 1.5 as our database engine. It works with multi-processor environments and we know of no issues with any brand of hyper threading available. When upgrading to Gradience, Firebird will NOT automatically replace InterBase. You will have to uninstall InterBase first as well as deleting the gds32.dll file. Then, install Gradience so that Firebird will install as your database engine.

If you're upgrading from Optima or MyBiz to Gradience follow these steps:
1. Back up your current data first.
2. From your Control Panel click **Add/Remove Programs**. Look for **InterBase 6** and uninstall it if you are not using it for another application. If you do not have InterBase 6, you may already have Firebird. If so, disregard Steps 3 and 4 below.
3. After uninstalling InterBase 6 close out of Add/Remove Programs and return to the desktop.
4. Do a search of your C: drive for **gds32.dll**. If you have this file, delete it.
5. Now install Gradience. No data needs to be imported. Gradience will read the database you already have and upgrade it to a Gradience database.

Note: *DO NOT continue to use Optima or MyBiz. These programs will still be able to access the data. Using the older version to access the Gradience database may result in a loss of data.*

Updating from versions older than Version 6

IMPORTANT! If you have been using Version 6 or below of Attendance Controller first make sure that your Benefit Labels are as follows:
Vacation
Sick
Personal

If your Benefit Labels are different, the database will not convert properly for Gradience to read it.

The database in Version 6 and below is dramatically different from what has been used since Version 7. If you're upgrading from a version below 6, you will need to upgrade to Version 6 first and then to Gradience 2007 (Version 9). Version 6 is on the Gradience CD under the **BIN/Legacy** folder. For assistance, please contact Tech Support at 888-925-7740 or go to www.gradiencesupport.com and click on **Ask a Question**.

Updating from Version 6

IMPORTANT! If you have been using Version 6 or below of Attendance Controller first make sure that your Benefit Labels are as follows:
Vacation
Sick
Personal

If your Benefit Labels are different, that database will not convert properly for Gradience to read it.

To upgrade from Version 6, follow these steps:

1. Install Gradience 2007 (Version 9). For assistance, call Tech Support at **888-925-7740** or go to www.gradiencesupport.com and click **Ask a Question**.
2. From the desktop click on **Programs** (or **All Programs**) > **Gradience** > **Maintenance** > **DB Monitor**.
3. Login with **ADMIN, ADMIN**
4. After the DB Monitor opens, click **File** and **Exit** and then, click **Yes** to shut it down.
5. Now, install Gradience 2008 (Version 10).

Auto Update Notification for Gradience Records (Pro/Enterprise)

Periodically, FREE updates may become available for this version of Gradience Records.
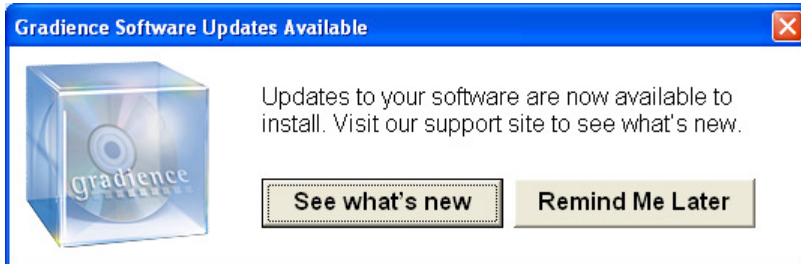
When opening the program; if an update is available, the pop-up shown above will appear.

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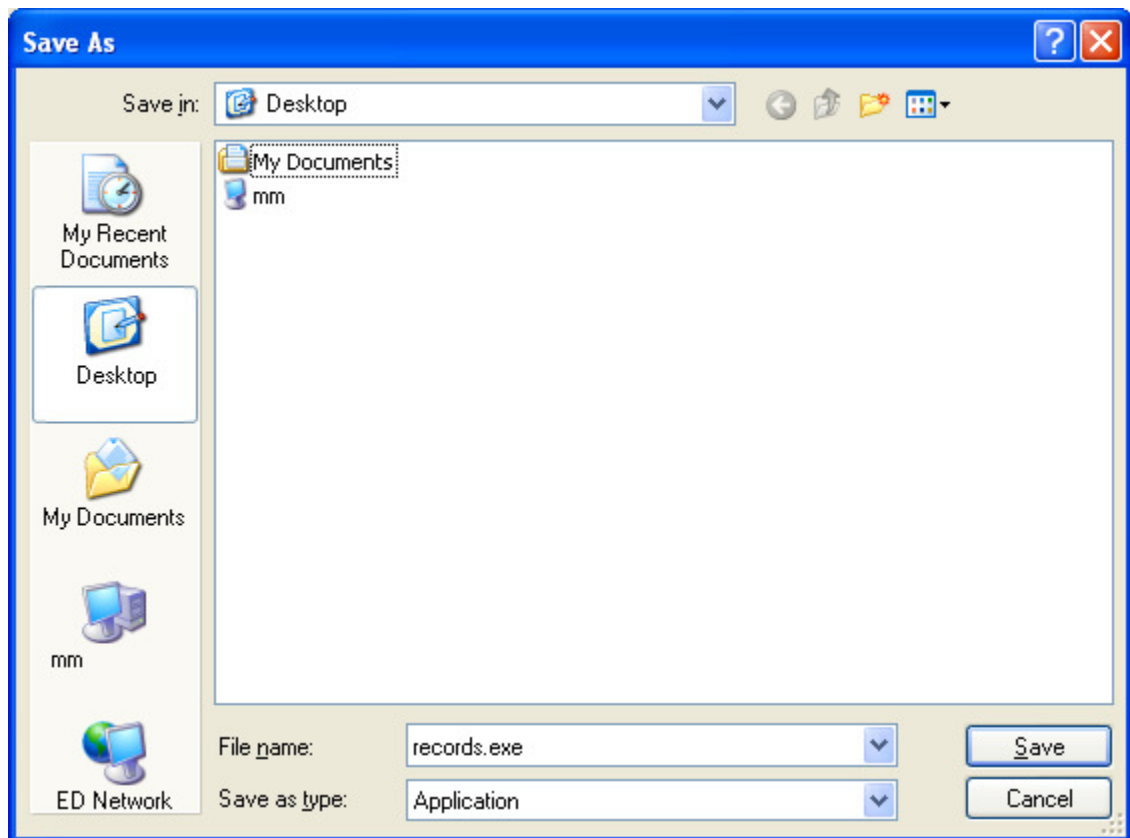
4. Once the download is complete; an installation icon like the one shown here will appear on your desktop.

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.

   • **Server Installation:**
   Install the update on the server or on a workstation that is "behaving" as a server for our program first before installing the update on individual "client" workstations. Ensure that your current version is not open. Double-click on the downloaded installation icon. When a prompt gives a choice between Server, Client and Standalone, select **Server**. When a prompt gives a choice between Custom and Express, select **Express**. This is true even is you had done a Custom installation originally. This is because you already have an established ini file **[hrware.ini]** that will properly direct the program to the data.

   • **Client Installation:**
   Now move the installation icon to the desktop of a client. When a prompt gives a choice between Server, Client and Standalone, select **Client**. When a prompt gives a choice between Custom and Express, select **Express**. Repeat at any additional client workstations running this software.

   • **Stand Alone Installation:**
   If you only have the program on one computer and the data is also on that same computer, double-click on the downloaded installation icon. When a prompt gives a choice between Server, Client and Standalone, select **Standalone**. 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.
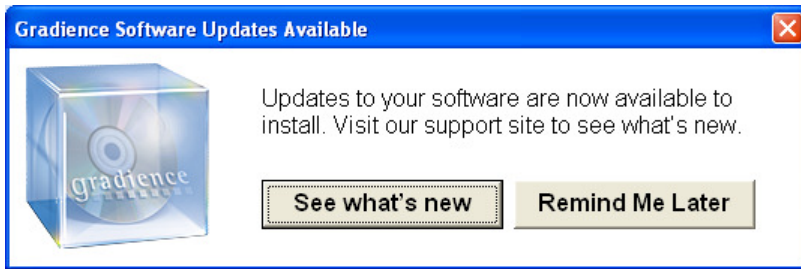
If no update is available, the pop-up shown below will appear.
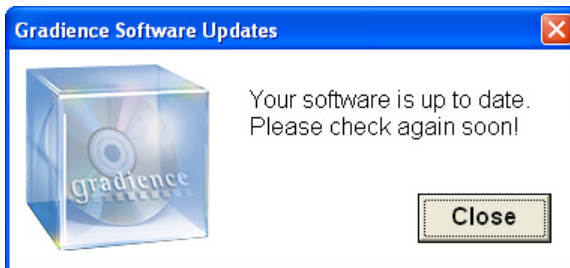
Before You Begin

Before you begin using Gradience Records, follow this checklist to get started quickly.

 PLEASE HAVE READ AND FOLLOWED THE PRECEDING CHAPTER ON INSTALLATION BEFORE INSTALLING ANY Gradience program.

Also, have available:

- Location and Department names
- User Information (Managers and other users that will have access to the data)
- Employee Data
- Employee Name,
- Hire Date,
- Work Status (full or part time),
- Active Status (Active, Inactive, or Terminated),
- Location and Department,
- Work Hours
- Week Hours

Auto Update

Single PC without IT support

- **PC needs Internet and FTP access**
- User must have PC and Network Administration privileges to complete these tasks.

Turn on Auto-Update (Client PC)

1. From within any Gradience application
2. Go To **Settings > Global Preferences > General Settings** – Select "Enable Auto Update"
3. From Help Menu – Select "Check for Updates"

Multiple PCs without IT support

- User must have PC and Network Administration privileges to complete these tasks.

Option A

1. Follow the same steps as used for a single PC environment.

Option B

- Gradience Version 10.0.712.13 or higher
- One of the PCs must have Internet and FTP access
- Must set up **Network Shared Folder** for GNSiteMirror application to write to it and for other PCs to read from it. The GNSiteMirror application replicates the FTP Update site to a local PC or Server.

Install GNSiteMirror application

- See below.

PC with IT support

- An IT Administrator must perform these tasks

Option A

1. Follow the same steps as used for a single PC environment.

Option B

- Gradience Version 10.0.712.13 or higher
- One of the PCs must have Internet and FTP access
- Must set up **Network Shared Folder** for GNSiteMirror application to write to it and for other PCs to read from it. The GNSiteMirror application replicates the FTP Update site to a local PC or Server.

Install GNSiteMirror application

- See below.

Turn on Auto-Update (Client PC)

1. From within any Gradience application
2. Go To **Settings > Global Preferences > General Settings** "Enable Auto Update"
3. From Help Menu – Select "Check for Updates"

Turn Off Auto-Update (Client PC)

1. From within any Gradience application
2. Go To **Settings > Global Preferences > General Settings** – Deselect "Enable Auto Update"
3. Use the management tool of your preference to perform the software installation.

GNSiteMirror Installation:

1. **Installing the gnsitemirror.msi download application**
- Installing from Gradience CD:
Navigate to the **Gradience CD > BIN > Gradience > Site Mirror** folder and double click on the **Gradience Site Mirror.msi** file.
- If you don't have a Gradience CD, you can download the file from our Website at:
http://downloads.gneiltechsupport.com/downloads/Gradience Site Mirror.msi
After downloading, double-click on the file to start the installation process.

2. **Point the gnsitemirror application to a shared folder**

a. Start the gnsitemirror application. You can find the shortcut at **Start > Programs > Gradience > Gradience Site Mirror**. This will place an icon in the System Tray (near the clock in the bottom right).
b. Right-click on Gradience Site Mirror select Settings.
c. In the Select Download Folder box, enter the shared path down to the folder where you want the clients to pull the updates from. The path will be created if it doesn't already exist. This folder will need to be shared so others can map to it.
d. Select the options:
Days between updates (minimum of 7 days) – this is how often this computer will check for updates from the FTP site.
Update Time (computer must be turned on to check updates) – this is when you want this computer to check for updates.
Start Gradience Site Mirror each time Windows starts – (Recommended) – allows the program to start automatically each time the computer is restarted.
e. Click OK.
f. Right-click on the icon in the System Tray and select Update Now. This will download any available updates for the current version.

3. **Set the Auto Update Settings for each Client Computer**

a. From each client computer, open the Gradience program.
b. Go to **Settings > Global Preferences > General Settings** Tab and enable the option for Automatic Updates. Close out of the Global Preferences.
c. Go to **Help > Auto Updater Settings** and set the path to the shared folder.

Checklist for Setting Up

Gradience Records first needs to collect some information in order to correctly track your employee absences. To get started, please follow the checklist below:

- Change Administrator Password
- Set Up Locations and Departments
- Set Up Global Preferences
- General Codes
- Enter Employee Data
- Add additional users

Changing the Admin Password

Option One: Setup rights from scratch.
Option Two: Duplicate the rights of another user.

See *Note* at the bottom of these instructions.

Option One: Setup rights from scratch.
1.   From any screen, click **Settings > User Security**.
2.   Click the **New** and enter new **log-in** and **Full Name**.
3.   Enter new **Password** and enter password again in the **Verify Password** field.

     Feature Access- By default, the **Detail** button (not Employee Detail) will be depressed. A feature list associated with the **Detail** button will appear at the lower right,
1.   Click on each item in the **Access Rights** column one at a time. When you do, the item will highlight and a down arrow will appear. Click on the down arrow and a drop-down menu will appear.
2.   Click on the selection that provides the appropriate level of access. Repeat this for each item on the list of features. You will have an additional button on your screen for each Gradience program installed:
*   **Gradience Attendance**
*   **Gradience Records**
*   **Gradience TimeClock**
*   **Gradience COBRA**

Click each of these buttons respectively and repeat steps **1**, **2** & **3** directly above. This will inform the database as to the level of access this person will have for each program loaded. Do this only once.

Now click the **Location/Department** button and ensure that the appropriate Locations and Departments are checked. If you wish to have access to selected features for all locations and departments, you will need to check them all.

Option Two: Duplicate the rights of another user.
1.   Click **Settings > User Security** and highlight the user who's rights are to be duplicated. To have your "new" administrative password "automatically" have the same, full rights as the default administrator login; highlight **ADMIN** on the list on the left. See first "Note" at the bottom of these instructions.
2.   Click the double-green checkmarks (**Save as**) button at the top. A pop-up window will open.
3.   Enter the new login, enter the name of the new user, enter the new password and enter the password again.
4.   Click **S**ave.

Notes:
1.   To deactivate **ADMIN**, Click on **ADMIN** on the list on the left and then, under **Is User Active**, click **No**.
2.   To "nearly" duplicate another user's rights, follow the steps in Option Two but before saving, "change" the access rights to those features that need to be restricted or enhanced. Then, click **S**ave.

Creating Locations and Departments

Locations and Departments are required and must be assigned to each of your Employees (See **Adding New Employees** to assign Location/Department to employees).

Note: When setting up Locations and Departments for the first time, a Location must be set up first, and then you may assign a Department to that Location.

Setting up Locations and Departments

Setting up Locations and Departments is a critical task and must be performed before you can proceed with other data entry steps. During the process, you will create Locations first, and then Departments afterward. Departments then can be assigned to Locations. Follow these steps:

1. Click on **Settings > Locations/Departments**.
2. With **Locations** already selected, click **New**, enter the name of the new location and click **Save**. All of the departments that have been created thus far will be made available to the new location. Simply check those departments that are appropriate to the new location and **leave unchecked** any departments that do not apply to the new location.
3. To create a new department, click **Departments** and then click **New**.
4. Enter the name of the new department and click **Save**. It will be available to all locations. Assign as needed by checking the new department for each location for which it is valid. **Leave it unchecked** for those locations for which it is not valid.

   Note: After creating new Locations or Departments, you need to refresh the Employee Detain screen for them to be available. To do so, look to the upper right. Just under the Gradience logo click the black **X** in the white box.

NOTE: As you add more locations and departments, you will see that each location has ALL of the departments you have created. However, only those departments you assign to a location will show up when assigning them on other screens. You may not remove a Department from a Location if an Employee is still assigned to that Location/Department combination. After adding and editing locations and departments, they may not immediately be available on the drop-down menu on the Employee Detail Screen. While on the Employee Detail Screen, click the "X" below the Gradience logo in the upper-right corner. Then, return to the Employee Detail Screen and the new location/department should be available.

Setting up Global Preferences

Global Preferences allow you to control your default program settings, such as Company Info, Report Options and specific program options.

See below for detailed information on each tab.

Company Info Tab

The Company Information screen allows you to enter your company name, address and logo. We recommend entering the company name and logo because these will print out on Reports.

Feature	Description
Company Name	(Recommended) This will display on the report heading.
Address, City, State, ZIP and County	(Optional)
Remove Current Logo	This allows you to unselect the current logo.
Assign New Logo	This allows you to select a new logo. This logo will display on the top left of reports.
Save Logo to disk	This allows you to save the current logo to disk or to your hard drive.

Editing Company Info

Follow these instructions to edit the company info:
1. Click **Settings, Global Preferences**. Enter information as needed.
2. Click **Save**.

Adding a Company Logo

If you have your company logo available in a bitmap (. bmp) or jpeg (.jpg) file format, you can have this logo appear on reports. Gradience supports .bmp and .jpg file formats not to exceed 200 x 200 pixels in size. The logo will appear in the top left when you print a report.

To add a company logo, follow these steps:
1. Click **Assign New Logo**.
2. Navigate to the directory where the company logo is stored. It can be in a .bmp or .jpg format no bigger than 200 x 200 pixels in size.
3. Click on the logo and then click on Open to select it.
4. Click the **Save** button.

Saving Logo to Disk

You may save the logo to a directory on a disk or hard drive. When you add a logo within Gradience, the logo is actually saved within the database file.

General Settings Tab

The General Settings screen allows you to enter the default hours in a day that employees will be assigned, and allows use of the Forgotten Password Utility. This screen also allows settings for Forced Writes to Firebird and prompting to backup on exit.

Feature	Description
Epoch Setting	We strongly recommend keeping the default settings. This setting will allow the Gradience program to appropriately interpret any two-digit year entered that is between 1920 and 2019. For example, with the default Epoch setting of 1920: • If you enter a date (such as in the Hire Date field) of 03/05/01, the program will interpret this as 03/05/2001. ***Note:*** *If you need to enter a year before 1920 or after 2019 in a date field within the program, you may enter the year as a four-digit number.*
Default Hours in a Day	These are the default hours that will be assigned when creating a new employee. The Day Hours on the Employee Detail screen will be filled in automatically with these default hours when a new employee is created.
National ID Number Format /Label	Selecting one of these options will allow you to set the mask for the National ID Number Format. The default mask is set to the USA SSN format. With this selected, whenever you enter a new employee, the dashes automatically will come up in the xxx-xx-xxxx format. The label is the title that will appear on the Employee Detail screen.

Feature	Description
Allow use of Forgotten Password Utility	This option allows access to a utility that can be used, only with assistance from Tech Support, to gain access into the Gradience program. Call Tech Support if you have forgotten or lost your Gradience password.
Forced Writes for Interbase	• If running the Gradience database on a Standalone computer, this option will help to keep the database more stable. A Workstation is more prone to lock up or crash than a Server. If the Gradience database is installed on a Workstation and the program is open at the time the computer locks up or crashes, the database is prone to becoming corrupt and possibly irreparable. A computer lockup or crash can be attributed to several things, including having too many programs open at the same time than what your computer memory can handle. • If the <u>database</u> is installed on a Workstation or Standalone computer, we recommend keeping this option checked. The performance may lag a little, but unless you have more than 800 employees, you may not even notice it. We also recommend having a current backup, created within Gradience or DB Monitor, available. If the database is installed on a Server, normally a backup of the whole Server is created on a daily or regular basis. We still recommend setting up Scheduled backups within DB Monitor, but having this option checked is not as important on a Server.
Prompt for backup on Exit	This option allows you to turn on or off the message prompting for backup when you close out of the program. Backups are very important. We recommend that you turn this feature off only if you have scheduled backups within the DB Monitor.

Report Options Tab

The Report Options settings affect how reports will appear by default.

Feature	Description
Print Preview	Toggles (turns on and off) showing preview first before printing
Header Bold	Toggles bolding for Header Title
Header Line	Toggles putting a line under the Header Title
Header Shade	Toggles shading for Location or Department title row
Data Line	Toggles lines to separate data information
Print SSN	Toggles ability to show Social Security Numbers
Print Picture	Toggles ability to print Picture on printout
Print Totals	Toggles whether Totals show up on reports

Editing Report Options

To Edit Report Options, follow these steps:
1. Choose an option by clicking in the box.
2. Click **Save**.

Attendance Tab

The Attendance Tab will show only if Attendance is installed.

Adding Employees

You may get to the Employee Detail Feature by selecting Employee Detail under the Feature Column.

All employees are entered through the Employee Detail screen. From here, you can enter their names, Social Security Numbers (optional), Hire Dates, Job Titles, and other pertinent information. This information is shared among Gradience Attendance, Records and TimeClock. This means that when you enter this information in one program, you'll be able to see it in the other Gradience programs.

Required Fields

The following fields are required: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, **Department** and **Day Hours**. **SSN** is not required in Gradience, but may be required when exporting Timecard Runs for certain payroll programs.

To add a new employee, click **New**. (See Required Fields.) Click **Save** after entering employee information.

Note: Locations and departments must be set up before entering new employees. (See **Locations**/**Departments** to set these up.)

Setting Up General Codes

To access General Codes, go to **Settings**, **General Codes**.

1. General Codes allow you to set up codes in addition to the ones already included in the program. For example, if you have Performance Rating selected from the Select Code column, you may add Fair if you so choose.
2. To add a new code, select the appropriate category from the Select Code column and click **New**.
3. Click in the blank Code Value block and enter the new code (For Example, Life Insurance - Self).
4. Double-click the Enabled block (adds a checkmark) and click **Save**. This will allow all codes selected to be viewed on the specific screen. For Example, if you click on the **Benefits** tab on the main menu, and click **Benefits List**, you will see the code Life Insurance-Self.
5. Click **Save**.

Follow the above steps to add new codes to any of the category listings.

A code cannot be deleted if it is in use. To delete a code, click on the appropriate code and click the Delete key. A message will pop up to confirm deletion and let you know if the code is in use.

Using the Enabled feature:

If you deselect a code by unchecking the Enabled block next to a Code, it will not show up as a selection in the drop-down box for the appropriate feature.

Select Code Definitions:

*   **Addresses Type** – This allows you to set codes for the list that will appear under Personal Contacts , Address, Address Type.
*   **Benefits** – This allows you to set codes for the list that will appear under Benefits, Benefits List.
*   **Education Degree** – This allows you to set codes for the list that will appear under Education, Degrees.
*   **Education School** – This allows you to set codes for the list that will appear under Education, School.
*   **Employee Relations** – This allows you to set codes for the list that will appear under Personal Contacts, Detail, Relations.
*   **Performance Rating** - This allows you to set codes for the list that will appear under Performance, Ratings.
*   **Performance Reasons** - This allows you to set codes for the list that will appear under Performance, Reason.
*   **Salutation**– This allows you to set codes for the list that will appear under Personal Contacts , Detail, Salutation.
*   **Separation Reasons** – This allows you to set codes for the list that will appear under Separations, Reason for Separation.
*   **Separation Type** – This allows you to set codes for the list that will appear under Separations, Separation Type.
*   **Training Certificate Names** – This allows you to set codes for the list that will appear under Training, Certification.
*   **Training School** – This allows you to set codes for the list that will appear under Training, School.

- **Training Seminar** – This allows you to set codes for the list that will appear under Training, Seminar.
- **Wages Reasons** – This allows you to set codes for the list that will appear under Wages, Reason For Change.
- **Warnings** – This allows you to set codes for the list that will appear under Warnings, Warning Type.

Security Options

Due to the confidential nature of information stored in Records, security is always turned on. This will help prevent unauthorized persons from accessing critical employee data. The use of security is required, and setting up access to Records and any other Gradience programs you have, should be the second thing you do. The first thing you should do (after changing the Administrator password) is set up Locations and Departments.To view the setup tasks you should perform, and the order in which they should be performed, click **Help > Checklist** from the main menu.

You may set up access for managers to view only their departments and/or view specific employees from other departments. You may also set up employees to have read-only access to their records.

Encrypt Data feature

Gradience Attendance contains a **Global Preference > General Settings** button called **Encrypt Data**. By clicking **Encrypt Data** and entering the secret key of your choice, sensitive information such as Social Security Numbers can be encrypted in the HRWARE database. This feature can help prevent the casual viewing of Social Security numbers by unauthorized persons.

To decrypt your data, simply navigate back to the **General Settings** and click **Decrypt Data**. Your data will no longer be encrypted.

User Security - Detail Tab

Features common to Gradience Records, Attendance, TimeClock and COBRA

- **Search For** – This allows you to search by User Name.
- **Save As** – This allows you to create additional users based on the access rights of another user.
- **Employee Record Access** – This allows access to view, add or delete employee records.
- **Employee Detail** – This grants access to the Employee Detail screen.
- **View SSN** – This allows access to view Social Security Numbers.
- **Run Reports** – This allows access to run reports.
- **Reminders** – This allows access to add and delete reminders.
- **Reminders, Assign Global** – This allows access to assign reminders as Global.
- **Reminders, Assign Users** – This allows access to assign reminders to other users.
- **User Security** – This allows access to add, edit, and delete users and user access.
- **Location/Department Maint** – This allows access to assign location /department access for users.
- **Global Preferences** – This allows access to edit global preferences.
- **Database Monitor** – This allows access to the DB Monitor.
- **Database Backup** – This allows access to Backup from the DB Monitor only.
- **Database Restore** – This allows access to Restore from the DB Monitor.
- **Alter Product License** – This allows access to enter a product key to change a license.
- **Product License. Conversion** – This allows access to run the Conversion Utility.
- **Custom Reports** – This allows access to create/modify Reports.
- **Import Data** – This allows access to import employee data into the database.
- **Export Data** – This allows access to export employee data.
- **Guest Users** – This allows access to connect to the database via a third-party ODBC driver.

Setting Access

Setting up access to common features (Detail Tab).

1. From the **User Security** screen, click **Detail>New**.
2. Enter a Log In and Password (letters and numbers only) and the user's Full Name.
3. Select options for **Displaying Reminder Alarms and Hints** for this login.
4. Select **Yes** to **"Is User Active"** to allow the user to begin logging in after giving access. Setting this option to No is a good security measure when users are out of the office for a number of days.
5. Select what type of **Feature Access** users will have by clicking in the **Access Rights** field.
6. Clicking on the arrow will allow you to select from the following:
   NO ACCESS – no access to selected feature
   READ ONLY – allows user to view only, cannot make any changes
   READ WRITE – allows user to view, add, and edit; no deleting allowed
   READ WRITE DELETE – allows user full editing rights to feature
   YES – allows access to feature
   NO – no access to feature
7. Click **Save**.

Program Specific Features:

Records:

- **Show Records Tab – This allows access to the Records Tab.**
- **Address – This allows access to the Address screen under the Personal Contacts screen.**
- **Emergency – This allows access to Emergency screen.**
- **Benefits – This allows access to the Benefits screen.**
- Benefit Plan Maintenance – This allows access to create, edit or delete Benefits.
- **COBRA – This allows access to the COBRA screen.**
- **Personal Contacts – This provides access to the Personal Contacts screen that allows you to enter emergency and dependent information.**
- **Taxes – This allows access to the Taxes screen.**
- **Wages – This allows access to the Wages screen.**
- **Performance – This allows access to the Performance screen.**
- **Warnings – This allows access to the Warnings screen.**
- **Education – This allows access to the Education screen.**
- **Training – This allows access to the Training screen.**
- **Accidents – This allows access to the Accidents screen.**
- **Separations – This allows access to the Separations screen.**
- **EEO/Other – This allows access to the EEO/Other tab.**
- **General Codes – This allows access to the General Codes under Settings.**

User Security - Locations and Departments

You should have already set up your Location and Department names (see Locations and Departments). Now you will want to set up users' access to the Locations and Departments by following these steps:

1. Click on **Location/Department** tab from **Settings > User Security > Detail**.
2. Click on the "+" (plus sign) next to **Locations/Departments** and next to the location and department name to expand the list.
3. Click in the check box next to the location and department name to select access to these areas or individual employees within these departments. This will put a checkmark in the box. Click in the box again to de-select (or clear) the item.
4. If you have already entered your employees in the program and assigned location and departments to them, when you expand a department, you will see all the employees assigned to that location/department combination. You may then select access to individual employees at this point by clicking in the box next to the employee.

   Note: If you have not yet entered your employees (through the **Employee Detail** feature or **Import Dat**a under the **File** Menu) into the program, you will still be able to assign access to a location/department combination, just not down to the employee level. You may later assign access down to the employee level after you enter your employees and assign a location/department to them.

5. Click **Save**.

Managing Employee Records

This chapter will help you become acquainted with the program layout and how to enter employee information. Throughout this chapter, there are examples of different program screens. You may wish to view the sample database to get a better picture of how employee records look once entered.

Make sure you have gathered the following information for each employee before attempting to enter employee records:

- Social Security Number
- Name (First, Middle, Last)*
- Employee Identification Number
- Date of Hire*
- Job Title
- How many hours in a normal day the employee works*
- Location*
- Department*
- Full or Part Time*
- Active, Inactive or Terminated Status*
- Time-Off Plan (Vacation, Sick, Personal, etc.)*

*** Required fields**

The Menu Bar

File Menu
- Maintenance->Backup Database – This lets you perform a database backup while running the program.
- Import Data – Imports basic employee data into the Gradience database.
- Export Data – Exports basic employee data from the Gradience database. (See Exporting)

- **Delete Employee** – Deletes an employee from the Browse or Employee Detail screens.
- **Exit**
- **MRU list** – Allows you to quickly select an employee by clicking on his or her name.

View Menu

- Filter Page – Gives other options for sorting and filtering, such as hiding terminated or inactive employees.
- Open Reminders – Brings up all open reminders (those not checked as resolved).
- Open Reminders – Allows access to all unresolved reminders.

Settings Menu
- User Security – Allows you to set user access to features, locations / departments and employees
- Global Preferences – Allows you to set program preferences such as Company Info, Report Options and other program options
- Guest Users – Allows you to set up user access for connection through an ODBC driver
- General Codes – Allows you to add/edit fields for most drop-down fields
- Locations/Departments – Allows you to add/edit locations and departments and assign departments to a location

Reports Menu
Previews and prints up to 36 reports; you can also access this list and select a report by clicking Reports on the left Feature Column.

Help Menu
- Contents– Brings up the Help File
- Checklist– Displays Checklist screen that helps you set up the program
- **Check For Updates**– Checks for any new updates
- **Auto Updater Settings** – Allows you to enable the auto-updating feature.
- System Information– Displays database information and current users
- About– Displays program version number and current license
- Alter Current Product License– Allows you to enter/edit product key code

Using Gradience Records

Gradience Records is now easier to navigate than ever before. Even better, if you have other Gradience software installed, such as Gradience Attendance and TimeClock, you have access to all programs and features from one convenient interface.

The main parts of the Gradience user interface are the Menu Bar, Program Bar, Feature Column, Employee Select Column, Selected Feature Pane.

The Program Bar

The **Program Button** in the upper-left corner allows you to select the Gradience program you wish to use and displays its features in the Feature Column.

The programs are color coded as follows:

Gradience Attendance 2008 –**Green**
GradienceRecords 2008 –**Red**
Gradience TimeClock 2008 –**Purple**

The Feature Column

The **Feature Column** allows you to select which feature will be displayed in the Feature Pane on the right side. To make it easier, we also color-coded the features of each program. For example, if you select Gradience Records, and select **Employee Detail** from the feature column, you will see a red title bar.

The Employee Select Column

The Employee Select Column allows you to select or find employees quickly and easily, as well as select multiple employees for printing reports.

Browse mode allows you to perform an incremental search for an employee, move columns and sort quickly.

An incremental search allows you to enter the first couple of letters of the employees' last name and will go to the first employee which matches those letters; and as you enter more letters, the search will become more defined. For example, if you enter the letter "A" in the Search field, the employee list will select the first employee name which starts with the letter "A." If you enter the letter "d," so that now you have "Ad" it will bring up the first employee name which starts with Ad, such as Adams.

You may move columns according to your preferences. To move a column, click and drag the title to the left or right. Double arrows pointing inward will show you where you will drop the title if you release the mouse button.

Sorting fields is just as easy. Just click on the title of the column you want to sort. For example, if you wanted to sort by first name, you would click on the **First Name** title. You can also set multiple sorts by holding the **CTRL** key and clicking on fields - the sort priority will be displayed above the field names.

Tree View mode allows you to find or select employees by location and department. For example, if you were looking for employees who are under the Ft. Lauderdale location / Merchandising department, Tree View mode could show you at a glance.

Tip: In Tree View, by default all locations and departments are unchecked. A quick way to select just one department is to click on the name of the department. This will select all employees under that department. Likewise, in Browse mode, you can select or deselect all employees by clicking on the red checkmark at the top left.

Selected Feature Pane

The **Feature Pane** is where the selected feature of the program will be displayed.

Note: Columns can be resized. To resize a column, move your cursor to the left or right edge of the column until your cursor turns into a double arrow pointing left and right; click and drag your left mouse button to the desired width and release. The Employee Select Column can also be hidden and unhidden by clicking on the minus or plus sign in the top right corner.

Accidents Feature

The Accidents Feature allows you to document on-site accident information as required by OSHA. This Feature in Gradiencecomplies with OSHA's Form 301 and must be completed within 7 calendar days after you receive information that a recordable work-related injury or illness has occurred. The information must be kept on file for five years following the year to which it pertains, in accordance with Public Law 91-596 and 29 CFR 1904 (OSHA's Recordkeeping Rule). There are many data fields that should be completed with each new incident. To add a new accident record, click **New** and fill in all applicable blocks. Click **Save** to keep changes. To delete a record, click **Delete.**

Benefits Feature

Benefits are important to all employees. On this screen, you can enter all of the information for the benefit plans your company provides. This screen will allow you to track benefits such as 401(k), COBRA, FMLA, dental, medical, life insurance, disability and others.

Benefits Description

Benefit Name	Description
401(k) Plan	Employee savings and retirement plan, usually deducted pre-tax from salary, designed to reward employees for their service and to provide a source of income upon retirement, disability, death and/or termination of employment.
AD & D Dependent	Accidental death and dismemberment Dependent coverage. Usually has a maximum benefit. This may be company-sponsored.
AD&D Self	Accidental death and dismemberment coverage. Usually has a maximum benefit. This may be company-sponsored.
COBRA	Federal law requires companies of 20 or more employees to continue availability of health coverage for specific periods of time. (Your state law may also have provisions.)
Credit Union	Financial institution that may offer special financial services such as low-interest credit cards, direct deposit and a variety of loans to members.
Dental-Dependent	Dental insurance coverage for employee's dependents.
Dental-Self	Dental insurance coverage for employee.
Life Insurance	Employee life insurance, usually has maximum benefits.
Major Medical – Dependent	Hospitalization for employee's dependents.
Major Medical-Self	Hospitalization for employee.
Medical-Dependent	Medical insurance for employee's dependents.
Medical-Self	Medical insurance for employee.
Pension	Retirement plan.

Education Feature
The Education Feature allows you to record information about an employee's educational background.

- **School** – Name of the school
- **Degree** – Select a degree or certification from the drop-down list (see the Schools button for information on adding to the list)
- **Graduated** – Employee's graduation status
- **Date Graduated** – Enter a date or click on the drop-down arrow to select a date
- **Comments** – Enter comments regarding education

Click **New** to create a new record and fill in all applicable blocks. Click **Save** to keep changes. To delete a record, click **Delete**.

To add to the School or Degree list, go to **Settings**, **General Codes**, and click on **Education School** or **Education Degree**. You may also enter the Seminar, School or Certificate name on the screen. Only names that have been entered through the General Codes screen will appear on the drop-down box.

EEO/OtherFeature

This option is for tracking EEO information as required by the Equal Employment Opportunity Commission. This information should be kept confidential and used strictly for EEO reporting purposes. Each EEO field is described below:

EEO

- **EEO Category:**Select the appropriate category for the employee.
- **Date of Birth:**Enter the employee's birth date.
- **Sex:**Select Male or Female.
- **Race:**The select item most appropriate for the employee's race.
- **Apprentice:**Check the checkbox to indicate the employee is an apprentice.

Note: The provided categories and race selections are taken from the official EEO categories as defined by the EEO commission. You may not create other categories. This program is updated periodically for FREE. If the government authorizes a new EEO category or authorizes that an existing category be changed, we will offer this revision in an update.

Other

The following items are miscellaneous information that you may choose to store about each employee:

- **Clearance Level:**This field would generally be used for a security clearance. For example, some government contracts may require your employees to have a security clearance, such as Top Secret, Secret, Classified, etc. If your organization doesn't have a need for this information, you could use this field for other purposes like whether or not this employee has authorization to enter the building after hours, etc.
- **Clearance Date:**This field would generally be used for storing the date that a security clearance was granted. This field is optional and can also be used for other dates as you see fit.
- **License:**This field is optional and can be used to store a license number if appropriate for your type of business.
- **Veteran Status:**If your business has a need to track an employee's veteran status, select the appropriate veteran status for the employee.
- **Martial Status:**Select the marital status of the employee.

Note: The provided categories and race selections are taken from the official EEO categories as defined by the EEO commission. You may not create other categories. This program is updated periodically for FREE. If the government authorizes a new EEO category or authorizes that an existing category be changed, we will offer this revision in an update.

I-9

- **Verified:**Is the employee verified for I-9 Renewals?
- **Renewal Date:**Select the date for Renewal.

Employee Detail Feature

The Employee Detail Feature is the main data entry and viewing screen for employee information. It is shared between the Gradience versions of Records, Attendance and TimeClock. If only one program has been installed, the features for the others will not be seen. The screen is divided into two sections, the browse and tree view on the left, and the main data entry screen on the right.

Note: Pictures are assigned to an employee through the Edit Picture button under the Personal Contacts or Employee Detail Feature.

- **Salutation**:Select Mr., Mrs., Ms., as appropriate; this field is not required.
- **First**:Enter employee's First Name.
- **Middle**:Enter the first letter for the employee's Middle Name (Middle Initial).
- **Last**:Enter the employee's Last Name.
- **SSN**:Employee's Social Security Number (or other National ID as selected under Global Preferences, General Settings)
- **ID**:Enter a unique ID for the Employee.
- **Hire Date**: Enter the date the employee was hired. If the employee has been hired more than once, you should enter the last (most recent) hire date.
- **Work Status**: Select Full Time or Part-time as appropriate.
- **Employment Status**: Select Active, Inactive, or Terminated to show the employee's status.
- **Type**: Select Regular or Seasonal
- **Job Title**: Enter the employee's current Job Title.
- **Location**: Select the location at which the employee is primarily employed.
- **Department**:Select the Department that the employee is currently assigned to.
- **Day Hours**: Enter the number of hours the employee will work in a typical workday.
- **Week Hours**: Enter the number of hours the employee will work in a typical workweek.

- **Hide Picture**: Click in this box to hide the assigned picture. To assign a picture, see the Edit Picture button under the Personal Contacts Feature.
- **Supervisor**:Enter the employee's Supervisor.
- **Position code**: Enter the employee's position code.
- **Recruiter**: Enter the employee's recruiter.
- **Source of Hire**: Enter the employee's source of hire.
- **Comments**: Enter any comments about the employee.
- **Edit Picture**: Remove or Assign a picture for the employee.

Adding a New Employee
1. Click the **New** button.
2. Enter the **Required Fields**. (You can use the TAB key to move from field to field or hold down the SHIFT key and press TAB to move back a field.)
    - Required Fields -
    - First and Last Name
    - Hire Date
    - Work Status
    - Employment Status
    - Location
    - Department
    - Hours(Day and Week) - This is the amount of hours an employee works for a typical workday and workweek. These numbers are used as defaults when generating report totals.

Performance Feature

The Performance Feature allows you to schedule and track performance reviews, as well as document employee skills and achievements. Several new areas of information have been added to this feature for Gradience Version 9, plus you can now attach supporting documentation files to comments fields.

- **Interviewer** – Name of the person conducting the review
- **Review Date** – Date of performance review
- **Reason** – General reason for review (annual, 3 month, etc.)
- **Overall Rating** – If applicable, the total score of the review
- **Next Review Date** – Date of next performance review
- **Increase**% – Amount of salary increase due as a result of the interview
- **Comments** – Allows you to enter comments or attach supporting documents (e.g., in Microsoft® Word) regarding the logistics of the review
- **Major Strengths – Allows you to enter comments or attach supporting documents (e.g., in Microsoft® Word) regarding the logistics of the review**
- **Areas Needing Improvement** – Allows you to enter comments or attach supporting documents (e.g., in Microsoft® Word) regarding the logistics of the review
- **Additional Comments** – Allows you to enter comments or attach supporting documents (e.g., in Microsoft® Word) regarding the logistics of the review
- **General Ratings** – Lets you rate employee (Outstanding, Very Good, Good, Improvement Needed, Unsatisfactory or Not Applicable) for various attributes:
  - Quality
  - Productivity
  - Job Knowledge
  - Reliability
  - Attendance
  - Independence
  - Creativity
  - Initiative
  - Adherence to Policy
  - Work Relationships
  - Judgement

Note: There are separate comment fields for each attribute so that you can include a brief note or attach supporting documentation; for example, under Productivity, you might attach an Excel file that summarizes the amount of work an employee performs.

- **Goals / % Achieved** – List up to five major goals the employee worked on during the last review period, plus assign a percentage to the amount of the goal that was achieved. The comments field for each goal allows file attachments.
- **New Goals / % Achieved** – List up to five major goals the employee should work toward until the next review; you can periodically update the percentage achieved as you get closer to the next review. The comments field for each goal allows file attachments.
- **Comments** – Here you can write any remaining notes concerning the review plus add file attachments.

Personal Contacts Feature

Recommendation:
We recommend that you enter all of the relevant personal contacts for each employee <u>before</u> <u>continuing</u>. As you enter each personal contact you will be given the option of designating the new contact as an Emergency Contact. For each one designated as an Emergency Contact, you will have the option of selecting the "order" in which they should be contacted in the event of an emergency involving the employee.

1. Click on **Personal Contacts** on the menu on the left side of the screen and then, click **New** and enter required data.
2. To add a photo of the contact (perhaps required for security reasons) you should click **Edit Picture**. This will allow you to navigate to where the photo is saved. The photo must be no larger than 200 x 200 pixels. If it is larger than this it cannot be saved into the program. You would need to use a program like PhotoShop to reduce it's resolution to 200 x 200 pixels and then you will be able to bring it into the Records program.

Later when you assign a benefit to an employee that will also cover dependent family members, the names entered here will appear as potential beneficiaries that may be selected.

Adding an Employee Picture

A photo gives you a visual image of an employee, their dependent(s) or emergency contact person(s). Photos are not required. We recommend you use a digital camera to take your photos and save the images in the industry standard JPEG (.JPG) picture format or Bitmap (.BMP) format. An image size of 200 x 200 pixels works best. If your picture is larger than this, the program will squeeze your larger picture into the displayed picture frame. If your digital camera has TWAIN support, you can import the picture right into Gradience using the Twain Import feature.

To add an employee picture follow these steps:

1. From either the Personal Contacts or Employee Detail Feature select the employee you want to add a picture to.
2. Click **Edit Picture**.
3. Click **Assign New Photo**.
4. Navigate to where the employee picture is.
5. Select it and click **Open**. If your photo is larger than the recommended size (200x200 pixels), you may get a message that asks if you still want to assign the file. If you click Yes, the program will try to squeeze your larger picture into the frame, however, the larger size of the file will be maintained and may make the database larger.
6. Click **OK**.

Using Twain Import

The Twain Import button allows you to import pictures directly from your Twain-compliant digital camera. You'll need to install the software that came with your digital camera. To import a photo from your digital camera, follow these steps:

1. First, you'll need to make sure that your digital camera is Twain-compliant and that the software that came with your camera is installed on the same computer where you will run Gradience.
2. Connect your digital camera to your computer.
3. Open Gradience and navigate to the employee you want to add a picture to.
4. Click on the **Personal Contacts** tab.
5. Select the Edit Picture button and click on the Twain Import button.
6. Click the Select Source button and then on your camera name. You may have one or two options available.

1. **[Camera Name]**– This option allows you to take the picture and import it to Gradience. Go to Taking a Picture and Importing to Gradience below to continue instructions.
2. **Photos in [Camera Name]**- This option will allow you to download and view the pictures on your camera's disk if you've already taken pictures. Go to Downloading Pictures from Camera Disk below to continue instructions.

Taking a Picture and Importing it into Gradience

Continue following these steps from Step 6a above:
1. After selecting your camera as the source, click OK
2. Click the Acquire Picture button and click Take Picture. The picture should show up on the Twain Import screen.
3. Click OK to select the picture.

Note: *The instructions for selecting or downloading a picture may be different depending on your camera.*

Downloading Pictures from Camera Disk
1. Continue following these steps from Step 6b above:
2. After selecting this option, click OK
3. Click the Download button to download the pictures to your computer.
4. Select the picture you want to import then click Transfer.
5. Click Ok to select this picture.

Note: The instructions for selecting or downloading a picture may be different depending on your camera.

Saving a Photo to Disk

All the pictures in Gradience are stored in the Gradience database (hrware.gdb). This option will allow you to save the picture to a different directory, if needed.

To save an assigned photo to your computer, follow these steps:

Note:The picture must be assigned to an employee before you can save it to a different directory.
1. Click Personal Contacts, then the Edit Picture button.
2. Click Save Photo to Disk.
3. Navigate to where you want to save the photo.
4. Name the photo.
5. Click OK. The picture can only be saved as a .bmp file.

Address Tab

The Address Tab allows you to enter an employee's contact information.

When entering an address, verify which name you are adding the address to by looking at the relation and name just below the Address Tab (or above Address Type and Last Updated). As in the above screen shot, we would be adding contact information to the Employee, Neil Adams. Use the top set of arrows to scroll to another contact name for the selected employee. For example, if we clicked on the Next arrow, we would scroll through the contact list for Neil Adams. Use the bottom set of arrows to scroll though the Address Type (Home, Office, etc.).

To enter address information for the selection Relation, follow these steps:
1. Click on the New icon.
2. Enter the contact information, filling out as much information as needed. These fields are not required.
3. Click the Save icon to accept changes.
4. Click the Cancel icon to discard any changes.
5. Click the Delete icon to delete an address record.

Reminders

The Reminders feature will show you all open (unresolved) reminders and allow you to create, delete and resolve reminders. If you have created a reminder, it will show up when you first open the program, starting on the reminder date. Reminders will continue to display until you click Resolved.

Reminders Tool Bar and Pane Layout

Tool Bar:
First — Prior — Next — Last arrows – Navigates through selected reminders
New – Creates a new reminder
Edit – Allows you to make changes to a reminder
Save – Saves reminder
Cancel – Cancels current changes
Delete – Deletes selected reminder
Print – Lets you print the Reminders report for selected employees
Help – Brings up help for this screen

Pane Layout:
Reminder Date – Date reminder should first display
Title – Heading of reminder
Resolved – Checkbox displays checked for resolved or unchecked for open (unresolved)
Employee Name – Displays name of employee that reminder is associated with
User – Displays name of user that reminder will display for
Description – The purpose of the reminder shows here

Filters:
User – Allows you to view reminders associated with specific users (must have access to Reminders, Assign Users under User Security)
Show Resolved – Displays Resolved reminders only
Show Unresolved – Displays Unresolved (open) reminders only

Creating a New Reminder

There are two types of reminders in Gradience:
- **One Time Reminders** – These are reminders that are meant only to remind you of a one-time event, such as:
  • Filing an Absence Report at the end of the year.
- **Recurring Reminders** – These remind you of the following recurring events:
  • Anniversaries (Gradience Attendance)
  • Birthdays, Performance Reviews, and I-9 Renewals (available if Gradience Records is also installed)

Setting a Reminder

One-Time Reminder:
1. Click on **Reminders** from the Features Column.
2. Click **New**.
3. Select (check) **One-Time Reminder**.
4. Enter a Title and Reminder Date

5. If you want the reminder to be associated with specific employees, select the checkbox, "Assign to all selected (checked) employees." This is optional and will create a separate reminder that is associated with each employee.
6. If you selected the checkbox in Step 5, you will need to select (check) any employees this reminder is about in the Employee Select Column. Otherwise, skip to the next step.
7. By default, the User's name will default to the login that was used to enter the program. Change this if you want the reminder to come up for another user, or you may select **Global,** which allows the reminder to come up for all users logging in.
    Note: You must have access to Reminders, Assign Users and Reminders, Assign Global under User Security to be able to change this option.
8. Enter a description of the reminder, if needed.
9. Click **Save**.

Recurring Reminder
1. To create a recurring reminder, follow these steps:
2. Select **Reminders** from the feature list.
3. Click **New**.
4. Select (check) **Recurring Reminder**.
5. Select the type of reminder: **Anniversary**, **Birthday**, **Performance Review** or **I-9 Renewal**.
6. Select a Through Date (when do you want to stop the reminder from occurring).
7. Select how many days you want to be reminded before the event.
8. By default, the User's name will default to the login that was used to enter the program. Change this if you want the reminder to come up for another user, or you may select **Global**, which allows the reminder to come up for all users logging in.
    Note: You must have access to Reminders, Assign Users and Reminders, Assign Global under User Security to be able to change this option.
9. Enter a description of the reminder, if needed.
10. Click **Save**.

Deleting Reminders

Reminders are deleted from the Main Reminders screen by clicking on the **Delete** icon.

Editing Reminders

There are two ways to edit reminders:
1. **Main Reminders screen -** From the main Reminders screen, you can edit the following columns just by clicking in the field: **Reminder Date**, **Title**, **Resolved** and **Description**.
2. **Edit Reminders screen -** Clicking on **Edit** from the main Reminders screen will bring up the Edit Reminder screen. You also may double-click on the title of a reminder. The Edit Reminders screen allows you to change the Title, Reminder Date, User and Description.

> **Note**: If you need to change the Employee Name this reminder is about, you'll need to delete the reminder and then recreate it.

Open Reminders

Open reminders will appear for the user they are assigned unless the Global option is checked. If a reminder is marked with Global, then it will show for all users. You may view open reminders by opening the program or selecting Reminders from the feature list.

Note: If you have security access to "Reminders, Assign Users" (see User Security), you may view reminders set up by other users. You also may resolve reminders from the Open Reminders screen.

Reports

Gradience Records creates many reports and charts that relate to employee record keeping. For additional reporting capability, please try Gradience Attendance, which offers you the power to track absenteeism and time-off benefit balances.

Creating and Printing Reports

There are two ways to preview and print a report.
1. You may preview and print from the individual feature by clicking on the Printer icon associated with that feature or
2. You may go to the **Reports** drop down menu or feature list for more sorting/filtering options.

Printing from the Reports Feature or Menu Bar

1. From the **Employee Select** column, select which employees you want to report on; you may use either the **Browse** mode or **TreeView** mode to select employees.
2. From the feature list, click **Reports** and then choose a report.
3. Select sorting / filtering options in the Feature Pane, if needed, and click **Preview**.
4. Click the printer icon to print.

Each report has basic and additional options for that specific report.

Separation Feature

The Separation Feature allows you to document employee separations properly, which can be very important if the separation is a termination. This documentation could serve as evidence at an unemployment compensation hearing or if an employee levels allegations of discrimination.

- **Comments** – Use this field to document the events of the separation meeting: what was said, behavior of the employee, etc. You can also include file attachments in this field.
- **Reason for Separation** – Select a reason from the drop down list; there are many default choices, but you can also customize this list through Settings, General Codes, Separation Reasons.

To add more reasons and separation types to the drop-down list, go to Settings, General Codes. Click New to record a new record. Click Save to keep changes. Click Delete to delete a record.

Taxes Feature

The tax screen can be used to record an employee's exemption and filing status. This information is usually found on the employee's W-4 form.

- **Number of Dependents** – Dependents may be children, spouse, parents or other.
- **Number of Federal Exemptions** – This is the number of exemptions that an employee is claiming.
- **Additional Amount Withheld** – Any additional amount withheld from an employee's paycheck.
- **Federal Tax Withheld** – Amount of Federal tax to be withheld from an employee's paycheck.
- **Effective Date** – Date of changes made to the employee's family status or the initial hire date.
- **Other Taxes** – This allows you to indicate if other types of taxes are paid.
- **Filing Status** – This allows you to enter the employee's filing status. Full
- **Full-time Student** – If the employee meets the requirements to be classified as a full-time student, you may check this option.
- **Comments**– This allows you to enter additional tax-related notes.

Training Feature

The Training Feature allows you to track seminars, certifications and courses.

- **Seminar**– Name of the seminar
- **School**– Name of the school
- **Certification**– Name of the certification
- **Certification#**– Certification number
- **Employer Cost**– How much the company paid for the training
- **Employee Cost**– How much the employee paid for the training
- **Begin Date**– Starting date of training
- **End Date**– Concluding date of training
- **Expiration**– Expiration date of training, if applicable
- **Mandatory**– Select if mandatory
- **Completed**– Select if employee completed the training
- **Comments**– Enter notes regarding training, plus file attachments

To add a new training record, click on **New** and fill in all appropriate fields. You may also enter the Seminar, School or Certificate name on the screen. Only names that have been entered through the General Codes screen will appear on the drop-down box.

To add to the list under Seminar, School, or Certification, go to **Settings**, **General Codes** and click on Training Certificate Names, Training School or Training Seminar. Click **New** and make an entry. Click **Save**. To delete a record, click **Delete**.

Wages Feature

Use the Wages Feature screen to track employee salaries and wage histories.

- **Reason for Change** – The Reason for change in wage amount (merit increase, length of service, etc.)
- **Effective From** – Date of pay change
- **Effective To** – Date of next review
- **Department** – Enter new department, if applicable
- **Job Title** – Enter new title, if applicable
- **Pay Frequency** – Frequency that employee is paid
- **Rate** – Employee's pay rate
- **Hour Rate** – Amount earned hourly.
- **Annual Rate** – Amount earned yearly.
- **Maximum** – Pay range (high end)
- **Minimum** – Pay range (low end)
- **Hours – Choose Full or Part Time, and if work for the employee is Educational, Seasonal and/or Temporary.**
- **Exempt** – Indicates exempt status. An employee is considered exempt if pay is determined on a salary basis. An non-exempt employee is paid by the hour.
- **Comments** – Enter additional wage related information, as well as attach any supporting file.

Click **New** to create a new wage record and fill in all applicable blocks. Click **Save** to keep changes. To delete a record, click **Delete**.

Warnings Feature

The Warnings Feature allows you to record disciplinary action, which protects employers in the event there's a dispute, especially if repeated warnings formed the basis of serious employee sanctions (e.g., suspension, demotion or termination).

- **Date and time of incident** – Date and time of the employee's unacceptable behavior or incident
- **Date of Warning** –The date that the employee received the warning
- **Interviewer** – Identify the individual giving the warning
- **Warning Type** – Select the reason for the warning, as defined under Reason Codes under the Settings menu
- **Comments** – Enter additional information regarding this warning, including file attachments that could provide supporting evidence. You can also note any other persons who witnessed the incident or presentation of the warning.
- **Notification** – Select the type of notification, either verbal or written. Gradience recommends employers always give warnings in written form, with both the Interviewer and Employee providing signature and date.
- **Action Taken** – Select the type of action that was taken:
    - Warning only
    - Probation
    - Suspension
    - Dismissal
    - Other (Specify in Comments field)
- **Signed Copy By Employee** / **Supervisor** – As noted above, a signed hardcopy of the warning by both employee and supervisor is best. Check here to verify this important step was taken.
- **Consequences should the incident occur again** – Note here what the employee should expect should the incident be repeated. The most broad statement would be "Disciplinary action up to and including termination."

To add additional Warning Types, go to **Settings**, **General Codes** and click on **Warnings**. Click **New** to record a new record. Click **Save** to keep changes. Click **Delete** to delete a record.

Types of Available Reports
Employee Reports

- Accidents Report – Track and report on employee Accidents.
- Performance Report – Track and report Employee Performance details.
- Detail – The Employee Detail Report produces a detailed report of each employee's primary information. Plus, their Supervisor, Job Code and Recruiter.

- Summary – The Employee Summary Report produces a summary report of each employee's primary information.
- Training – Training Report #1. The Employee Training Report produces a record of training sessions attended by all employees.
- Training Extended – Training Report #2. The Training Extended Report produces a training report on legal size paper to fit more information.
- Education – The Employee Education Report produces a record of educational institutions attended by an employee. Degrees and certifications are included in this record.
- Reminders – The Employee Reminder Report produces a listing of all open reminders sorted by reminder date.
- Separations – The Employee Separations Report documents reasons for separations.
- Warnings – The Employee Warnings Report produces a printed record of all employee warnings occurring within a specified date range.
- Dependents – The Employee Dependents Report produces a report of employee dependents.
- Emergency – The Employee Emergency Report produces a report of emergency contact information for employees.

Date Reporting

- Anniversary – The Anniversary Report produces a list of employees whose hire dates fall within a specified date range.
- New Hires – The New Hire Report produces a list of employees hired within a specified date range.
- Birth Date – The Birth Dates Report produces a list of employees whose birthdays fall within a specified date range.
- Seniority – The Seniority Report produces a list of employees by hire date, from the earliest to latest hire date.

Salary Reports

- Ranking/Analysis – The Salary Ranking/Analysis Report produces a list of employees ranked by salary.
- History – The Salary History Report produces a list of all employee salary changes.
- Tax Settings – The Tax Settings Report produces a report of employee's tax information.

Benefits Report

- The Benefits Report produces a listing of each employee's benefit status.

Performance Reports

- Review History – This report is useful for department managers to schedule and prepare for upcoming reviews. It shows selected employee's next, last and overdue review dates, increases and ratings. It can be sorted by location, department and by date of last review.
- Review Schedule – This report produces a listing of performance review records. It shows each employee's next review date, job title, hire date, and last review date. It can be sorted by location, department, and by date of next review.
- **Review Detail** – Provides actual reviews that have been performed.

Government Reports
- EEO Detail – The Equal Employment Opportunity (EEO) Detail Report shows the data used to compile the EEO Summary Report. This report shows the employee name, title, full-time/part-time, status, hire date, sex, EEO, category and ethnic code.
- EEO Summary – The Equal Employment Opportunity (EEO) Summary Report shows each of the five U.S. Government defined race classifications broken down by EEO classifications (from the EEO categories table). EEO Categories are job classifications such as Sales Workers, Craftsman, Professional, etc.
- COBRA – The COBRA Report produces a listing of important COBRA dates for all employees and their dependents if applicable. This report shows the date the employee was notified about COBRA benefits, if the employee accepted, when benefits end and the ending COBRA coverage date.
- I-9 Renewals – The I-9 Renewals Report produces a listing of upcoming renewal dates for employees to resubmit their government I-9 form. It shows each employee's name, title, hire date and I-9 renewal date.
- Accident Report – The Accident Report produces a listing of all reported accidents that occurred within a specified date range.
- Accident Detail – The Accident with OSHA report produces a listing of all reported accidents that occurred within a specified date range.

Telephone List
The Telephone List Report produces a record of all employee phone numbers. You can print office phone number with extension number, office extension only or home phone number.

ID Badges
This feature enables you to print employee ID badges with photos.

Labels
This report enables you to print mailing labels for employee mailings. Records supports three different Avery label formats:
Avery 5160 3x10 (2.63'' x 1"), Avery 5261 2x10 (4'' x 1'') and Avery 5262 2x7 (4'' x 1.33'').
Gradience Records now enables you to adjust the position of your labels. On the Label Report screen there are two options:Left Offset and Top Offset. Adjust the position of your labels using these two options.

Charts
- Salary Breakdown– The Salary Breakdown Chart allows you to view salaries broken down in a pie chart, bar graph, line or point chart format.
- Ethnic Codes –The Ethnic Codes Chart allows you to view race categories broken down in a pie chart, bar graph, line or point chart format.
- **EEO Category Breakdown** – The EEO Categories Chart allows you to view race categories broken down in a pie chart, bar graph, line or point chart format.

Charts – Report Interface

Charts allow you to view **Salary Breakdown, Ethnic Codes, and EEO Category Breakdown** information.

Charts can help you view information at a glance. Using the charts, you can view these charts:

- **Salary Breakdown** – Enables you to view and compare salary breakdown.
- **Ethnic Codes Breakdown** – Enables you to view your companies race breakdown.
- **EEO Category Breakdown –** Enables you to view your companies EEO category breakdown.

Follow the steps here to print a chart:

1. Click **Reports** from the main menu, select **Charts;** then select the Chart you wish to use.
2. Select the **Options** you want.
3. Click **Run Graph.**The chart control window will appear.
4. The selections here will affect the chart as it is shown on screen. Select the options you want and click the **Preview & Print** icon to see how the chart will appear.

From the Preview screen, click the Printer icon to print the chart.

When you click on **Run Graph** you will have the following options:

- Preview & Print – This shows a preview of the chart.
- Close – Exits the Chart screen.
- Help – Brings up Help pertaining to this screen.
- Chart Type – Gives you the choice of viewing as a Pie, Bar Graph, Line, or Point Chart.
- Color assignments – This allows you to set the colors of a specific month.
- Display – Toggles the Legend (data box next to the chart), Parameters (data at the bottom of the chart), and Ignore Zeros (any data on the chart with zeros).
- Label Display – Toggles the Label only (months), Value only (see Value Display), or Label and Value.
- Value Display – Toggles the value as a number (count), percentage, or Percentage Of (shows as: [percentage] of [total count]).
- 3-D Control – This allows you to view the depth of 3-D by moving the arrows.
- Rotation – Rotates the Pie Chart in the desired direction.
- Explode Biggest – Moves the largest piece away from the pie.

Accident Detail Report

The Accident Detail report prints all accident information that occurred within a specified date range for each employee selected.

Additional options for this report:
- Injury Date: From/Through – This allows you to view all injury dates.
- Date Reported: From/Through – This allows you to filter by date reported.

Accident Report

The Accident Report produces a listing of all reported accidents that occurred within a specified date range.

Additional options for this report:

- Employee – Employee name.
- Case Number – Assigned case number.
- Injury Date: From/Through – This allows you to view all injury dates.
- Date Reported: From/Through – Date reported from and through.

- Incident Occurrence – How incident occurred.

- Days Off – How many days the employee was off work.
- Return Date – Return to work date.

Anniversary Report

The Anniversary Report produces a list of employees whose hire dates fall within a specified date range.

Additional options for this report:

- From Date/To Date – runs the anniversary report according to this date range

Basic Report Options
Each report has the same Menu, Grouping and Export options:

Report Menu Options
- Preview – Displays the report with options to print and setup printer.
- Print – Sends the report to the selected printer.
- Custom – Allows you to customize a report.
- Help – Displays help pertaining to this screen.

Grouping Options
- Location – Groups data by Location.
- Department – Groups data by Department. With Location also selected, the report will group by location, then department.
- Show Group Totals – Shows total number of employees after Location and/or Departments with a grand total at the end of the report. Location and/or Department must be selected for this option to be enabled. With both Location and Department unselected, the report will group by Last Name in alphabetically order.

Display Options
- Show Social Security Number on Report – This allows you the option of displaying the SSN on reports that include this data field.

Alert for former Optima Users: Options for selecting only **Active**, **Inactive** or **Terminated** employees no longer appear within the Report Options Pane. However, if you do need sort by employment status, you can do so through the **Sorting**/**Filter Page** under the **View** menu.

Benefits Report

The Benefits Report produces a listing of each employee's benefit status.

Additional options for this report:

- Eligible Date – Shows Benefits with an Eligible Date within selected date range
- Joined Date – Shows Benefits with a Joined Date within selected date range
- Withdrew Date – Shows Benefits with a Withdrew Date within selected date range
- Waived Benefits Only – Shows Benefits with a Waived Benefits date within a selected date range
- Report Only Selected Benefit(s) – With this box checked, it allows you to select one or multiple benefits to report on

Birth Date Report

The Birth Dates Report produces a list of employees whose birthdays fall within a specified date range.

Additional options for this report:

- Filter Settings – runs a birthday report within a certain date range.

COBRA Report

The COBRA Report produces a listing of important COBRA dates for all employees and their dependents if applicable. This report shows the date the employee was notified about COBRA benefits, if the employee accepted, when benefits end and the ending COBRA coverage date.

Additional options for this report:
- Employer EndingDate – Shows employers ending COBRA date
- COBRA Ending Date – Shows COBRA ending date
- Notification Date – Shows employee notification date

EEO Detail Report

The Equal Employment Opportunity (EEO) Detail Report shows the data used to compile the EEO Summary Report. This report shows the employee name, title, full-time/part-time, status, hire date, sex, EEO, category and ethnic code. The EEO Detail report is a great report for auditing purposes. It gives specific EEO information including Employee Name, Title, Full or Part-time, Active status, Date of Hire, Sex, Race and Category.

Additional options for this report:
- Employed During: From/Through – Reports on employees employed during a selected date range
- Separation Date: From/Through – Employed During must be selected before this option will be available. Reports on employees separated during a selected date range.
- Sort By Hire Date – This allows you to sort data on report by Hire Date
- Sort By Separation Date – This allows you to sort data on report by separation date
- Sex – This allows you to sort by Male or Female
- Select Specific Race – This allows you to sort by multiple selected races. Click in the box next to Select Specific Race to be able to select specific races.
- Select Specific Category – This allows you to sort by multiple selected categories. Click in the box next to Select Specific Category to be able to select specific categories

EEO Summary Report

The Equal Employment Opportunity (EEO) Summary Report shows each of the five U.S. Government defined race classifications broken down by EEO classifications (from the EEO categories table). EEO Categories are job classifications such as Sales Workers, Craftsman, Professional, etc. The EEO Summary is another great report for auditing purposes. It gives specific Race totals by Category.

Additional options for this report:
- Employed During: From/Through – Reports on employees employed during a selected date range
- Separation Date: From/Through – Employed During must be selected before this option will be available. Reports on employees separated during a selected date range.
- Select Specific Racee – This allows you to sort by multiple selected races. Click in the box next to Select Specific Race to be able to select specific races.
- Select Specific Category – This allows you to sort by multiple selected categories. Click in the box next to Select Specific Category to be able to select specific categories.

Employee Dependents Report

The Employee Dependents Report produces a report of employee dependents.

Additional options for this report:
- Show Social Security Number on Report – toggles on or off the SSN

Employee Detail Report

The Employee Detail Report shows pertinent employee information including accrual plan assignments, balances, initial balances, Supervisor, job code, recruiter and notes from the Employee Detail Feature.

Additional options for this report:
- Show Social Security Number on Report – allows you to toggle on or off the SSN on this report.
- Print Picture – allows you to toggle on or off the assigned employee picture on this report.

Employee Education Report

The Employee Education Report produces a record of educational institutions attended by an employee. Degrees and certifications are included in this record.

Additional options for this report:
- Degree Date – filters when an employee received his or her degree

Employee Emergency Report

The **Employee Emergency Report** produces a report of emergency contact information for employees.

Additional options for this report:
- Show Social Security Number on Report – toggles on or off the SSN

Employee Reminders Report

The **Employee Reminder Report** produces a listing of all open reminders sorted by reminder date.

Additional options for this report:

- Sort Options – Sorts by Date, Name, Topic or User Name
- Reminder Date – Selects the date range of reminders to display

Additional Filters

- User – Shows reminders assigned to selected user
- Display All Users – Shows reminders for all users
- Show Resolved – Shows resolved reminders
- Show Unresolved – Shows unresolved reminders
- Show Global Only – Shows reminders assigned as Global

Employee Separations Report

The Employee Separations Report documents reasons for separations.

Additional options for this report:
- Separation Date – Filters on separations within this date range

Employee Summary Report

The Employee Summary Report shows an employee's date of hire, title, status and work status. Use this report when you want an employee listing.

Employee Training and Training Extended Report

Training Report: The Employee Training Report produces a record of training sessions attended by all employees. In contrast, theTraining Extended Reportproduces a training report on legal size paper to fit more information.

Main options:
- Training Date Filters
- Begin Date – select a beginning date for training
- End Date – select training ended through this date
- Expiration Date – select an expiration date for training

Additional Filters
- Mandatory – filters on training marked as mandatory
- Completed – filters on training marked as completed
- Select Seminar – filters on a specific seminar
- Select School – filters on a specific school
- Select Certification – filters on a specific certification

Additional Options:
- **Grouping Options** – By checking these boxes, you can group your report by Location,**Department**, or by (**Show**)**Group Totals**.
- **Show Social Security Number on Report** - Displays the employee SSN on reports.
- **Include Images for Custom Reports** – Check this box if you want to include images when creating or printing your custom reports.

Employee Warnings Report

The **Employee Warnings Report** produces a printed record of all employee warnings occurring within a specified date range.

Additional options for this report:
- Warning Date – filters on warnings given within this date range
- **Show Comments – displays comments on Warnings report.**
- **S**how Consequences – displays consequences on Warnings report.
- **Grouping Options** – By checking these boxes, you can group your report by Location,**Department**, or by (**Show**)**Group Totals**.
- **Include Images for Custom Reports** – Check this box if you want to include images when creating or printing your custom reports.

I-9 Renewals Report

The I-9 Renewals Report produces a listing of upcoming renewal dates for employees to resubmit their government I-9 form. It shows each employee's name, title, hire date and I-9 renewal date.

Additional options for this report:
- I-9 Renewal Date: From/Through– This allows you to view all I-9 Renewal dates

ID Badges

This feature enables you to print employee ID badges with photos and barcode. There are four types of ID Badges: Employee, Temporary, Guest or without a title.

Additional options for this report:

Layout Tab:

The Layout Tab allows you to select what features will be on the ID Badge. For example, if you want the badge title to read Guest instead of Employee you can select Guest under the Badge Title.
- Printing Options: Print Title, Print Department, Print Employee ID Style 1, Print Employee Style 2, Print Location, Print Picture, Print Company Logo and Print Company Name
- Badge Title – This allows you to print selected Title across Badge.
- Name Format – This allows you to choose how the name will display on the badge.

Barcode Tab

The Barcode Tab allows you to select the type of Barcode that will be printed. If you're not sure which type to use, we recommend keeping the default barcode type of Code 39. Gradience Records uses the Employee ID as the Barcode number. If an employee does nothave an Employee ID number (SeeEmployee Detail screen), a barcode will not print out on the label.
- Print Barcode – This allows you to print a barcode across the bottom of the ID Badge.
- Barcode Type – This allows you to select from popular barcode types.

Layout | Barcode | Print Stock | Label Adjustments

☐ Print Barcode

Barcode Type
- ○ Code 128
- ● Code 39
- ○ Code 39 with check
- ○ EAN 13
- ○ EAN 8
- ○ ITF
- ○ ITF with check
- ○ Post Net
- ○ UPCA

EMPLOYEE
Susan Atkins
A/P Representative
Accounting
ID : 32674

Sample Company   Logo

Print Stock Tab

The Print Stock Tab allows you to select the label type. The Gradience ID Badge Kit (S0050) can be requested through our sales team and is specifically designed to work with Gradience Records and TimeClock. Each kit makes 25 badges.

Layout | Barcode | Print Stock | Label Adjustments

Badge Options
- ● G.Neil ID Badge
- ○ Avery 5390 - 2.25" X 3.5"
- ○ Avery 5395 - 2.333" X 3.375"
- ○ Avery 5371 - Card Stock 2" X 3.5"

EMPLOYEE
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Sample Company   Logo

Label Adjustments Tab

Printers are not created equally; some may print the labels too far to the right or left. The Label Adjustments tab allows you to move the labels to the left or right and up or down to accommodate quirky printers. Normally, you should not need to adjust the labels to the right and left, or up and down, but it's there in case you need it.

Feature	Description
Left Offset	When using the Left Offset, positive numbers will offset the label to the right and negative numbers

	will offset the label to the left.
Top Offset	When using the Top Offset,positive numbers will move the labels down, and negative numbers will move the labels up.
Picture Offset	The Picture Offset allows you to stretch the picture by using positive numbers and negative numbers will squish the picture, if needed.
Save Label Adjustment	The Save Label Adjustments button allows you to save your current settings.

Labels Report

This report enables you to print mailing labels for employee mailings. Gradience Records supports three different Avery label formats and a number of other printing options:

General Options:
- Print Phone Number on Label
- Print Names Only
- Name Format (**Last, First** or **First Last**)

Label size: – (you can only choose one size)
- Avery 5160 (3 x 10 (1" x 2.625")
- Avery 5261 (2 x 10 (1" x 42")
- Avery 5162 (2 x 7 (1.333" x 4")

Sorting Options:
- Location
- Department
- Show Social Security Number
- Include Images for Custom Reports

New Hires Report

The New Hire Report produces a list of employees hired within a specified date range.

Performance Review History Report

This report is useful for department managers to schedule and prepare for upcoming reviews. It shows selected employees' next, last and overdue review dates, increases and ratings. It can be sorted by location, department and by date of last review.

Additional options for this report:

- Last Review Date – This allows you to report on dates of Last Review within selected date range
- **Grouping Options** – By checking these boxes, you can group your report by Location, **Department**, or by (**Show**) **Group Totals**.
- **Include Images for Custom Reports** – Check this box if you want to include images when creating or printing your custom reports.

Performance Review Schedule Report

This report produces a listing of performance review records. It shows each employee's next review date, job title, hire date, and last review date. It can be sorted by location, department, and by date of next review
.
Additional options for this report:

- Next Review Date – This allows you to report on dates of Next Review within selected date range
- **Grouping Options** – By checking these boxes, you can group your report by Location, **Department**, or by (**Show**) **Group Totals**.
- **Include Images for Custom Reports** – Check this box if you want to include images when creating or printing your custom reports.

Salary History Report

The Salary History Report produces a list of all employee salary changes.

Salary Ranking/Analysis Report

The Salary Ranking/Analysis Report produces a list of employees ranked by salary.

Salary Tax Settings Report

The Tax Settings Report produces a report of employee's tax information

Seniority Report

The Seniority Report produces a list of employees by hire date, from the earliest to latest hire date.

Table Listings

Table Listings enable you to view and print out the following settings:
- **User Security (Summary)** – Displays a list of everyone who has some level of access.
- **User Security (Detail)** – Displays in detail what level of access each person has.
- **Locations** – This prints all locations.
- **Departments** – This prints all departments.
- **Assigned Departments** – This prints Locations with assigned departments.
- **General Codes** – This prints the code listing from Settings, General Codes.

Steps to print a Table Listings report:
1. From the Reports menu, select Table Listings.
2. Choose the Table Listings report you would like to run.
3. Click **Preview** to view the report or **Print** to print out the report.
4. In Preview mode click the print icon to send the report to your printer.

Telephone List Report

The Telephone List Report produces a record of all employee phone numbers. You can print office phone number with extension number, office extension only or home phone number.

Additional options for this report:
- Phone Number– Allows you to select which phone number to report on
  - Office Phones with Extension
  - Office Extension Only
  - Home Phones
- Name Format– Allows you to select how to sort the employee names
- Display Job Title– Allows you to toggle showing employee Job Title

Custom Reports

From any report feature (and after selecting filters and options such as Date ranges, Location and Department groupings, etc.), you can begin the process of creating a custom report. Custom Reports are a function of the **FastReport**™ engine built into Gradience. The purpose of this tutorial is to take you through the process for creating a custom report, editing some basic information inside FastReport, then showing you the outcome. For a full tutorial on working with FastReport, please see the FastReport documentation.

Custom Reports give the user the option to present data from the original (template) report in new and exciting ways. How it works: The "default" Gradience report (called a "template" inside the application) is used as a base for the new custom report. The user always can start a new report from scratch, but it is usually easier to create a new report by modifying a copy of the original template.

To create a custom report based on an existing report, you would click the Save As button and select a new name for the report. You then would proceed to edit the new "copy" of the report. To edit an existing report, select the report and click the Edit button. If you attempt to edit the "Default" report, a new name will be assigned automatically.

To create a custom report, follow these steps:

1. For this example, we will use the original Attendance Detail report as a template to create a new (custom) version of the report. Start by navigating to Reports > Attendance Detail.
2. Locate and click the Custom Report icon near the top right of the page.
3. A new window titled Custom Reports – Attendance Detail will appear (shown below). As you can see, the current report name (in grayed-out text) is Attendance Detail Template.
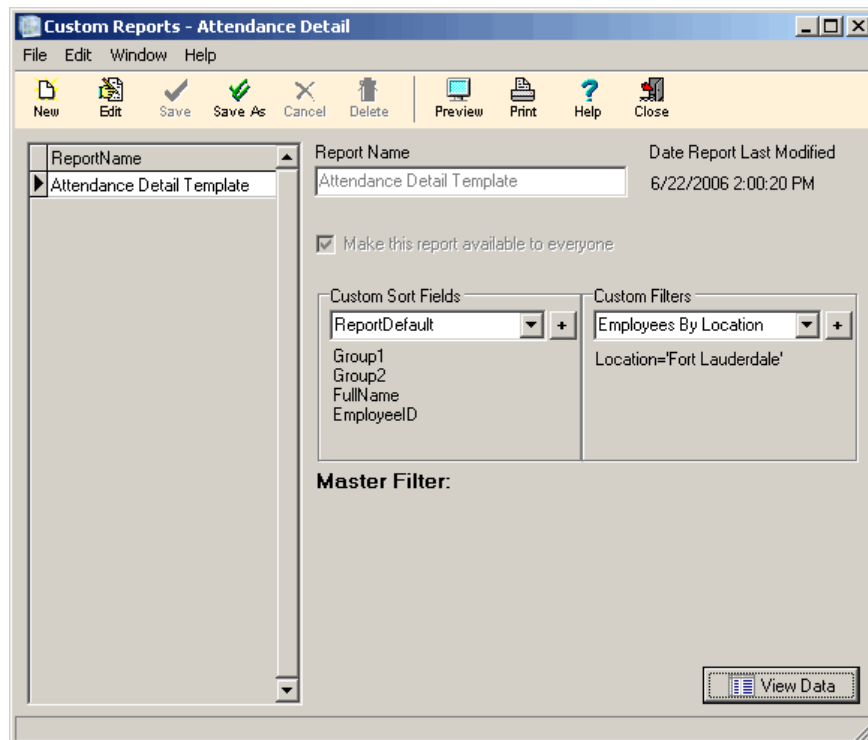
4. A Custom Sort can be selected by using the drop-down selection in the Custom Sort Fields section. Custom Sort Fields work by allowing you to select a field that will be used to sort the records on your custom report. Some built-in examples include LastName and EmployeeID, and ReportDefault appears as the default selection when you create your first custom report (you probably will want to change the default selection). Click Edit first, then click the (+) button to the right of the drop-down to edit a Custom Sort field or create a new one.
5. A Custom Filter can be selected by using the drop-down selection in the custom filter section. Because you already have activated editing for items in this window, you can go ahead and click the (+) button to the right of the drop-down to edit Custom Filters or create new ones.
6. By clicking the View Data button, you can see the results of any changes made to the sorts or filters. This can be very helpful when creating your own custom reports because you will be able to "preview" your report before you actually begin editing it in FastReport.

7. After previewing your data, click Close in the viewer window to return to the Custom Reports window.
8. If the report you wish to customize is not highlighted in the ReportName section, select the desired report now.
9. Clicking New or Edit will bring you into the FastReport custom report designer. While in the designer, you will have the option to save the report as another name or save it to an external FastReport 3 (.fr3) file. You also will have the option to open a previously created FastReport file and save it in your database. See Help/Help Contents while in the designer for more information.
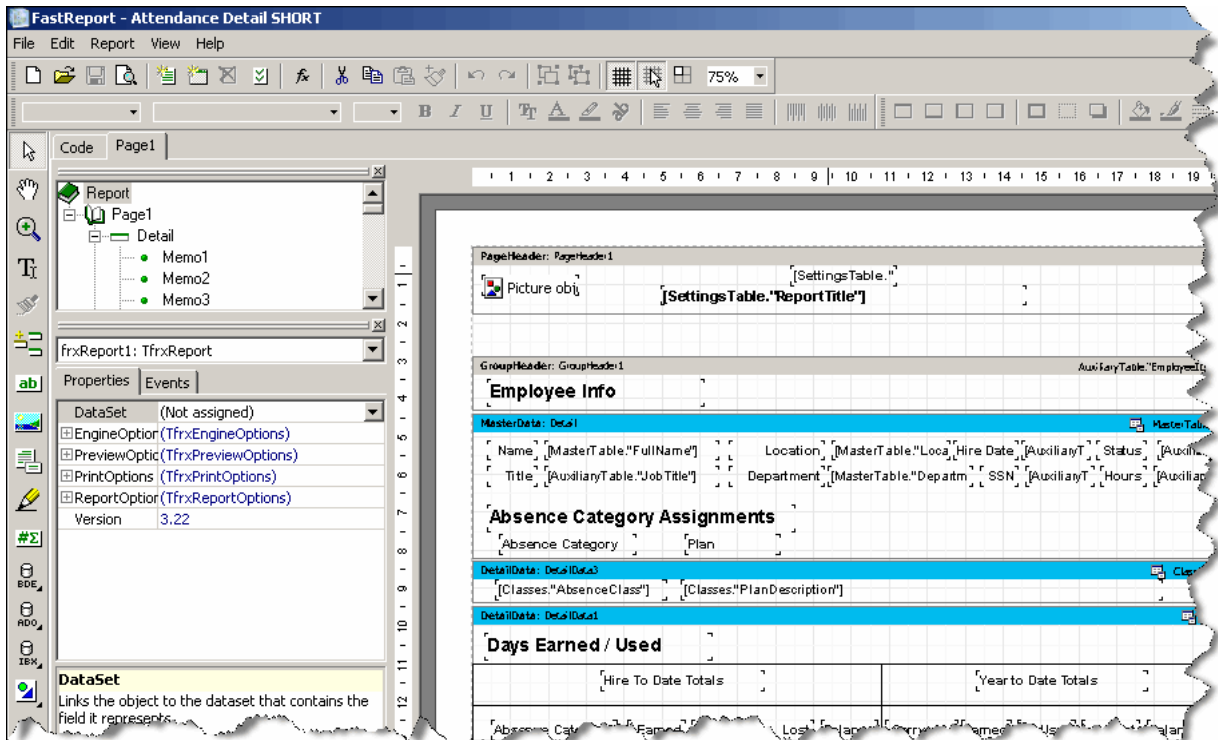
10. Once you are finished editing your custom report in the designer, click File > Save, Save As or Exit to close the report to return to Gradience.

Note: *Tech Support does not offer training on Custom Reports. However, we can e-mail you a tutorial on Custom Reports free-of charge. To request a copy go to* www.gradiencesupport.com *and click on* **Ask a Question**.

Before Contacting Technical Support

Please follow these guidelines before contacting Technical Support:

- Remember, Gradience does not support setting up networks or computer configurations.
- If you are having problems with your computer, try rebooting to see whether that corrects the issue.
- If you are getting an error message, an access violation or encounter the software behaving in a manner that is unusual, go to the computer where the database is located and run the **Database Maintenance**.

  From the desktop click on **Start > Programs (or All Programs) > Gradience > Maintenance > DB Maintenance**. When the **DB Maintenance** window opens click on the Start button within that window. When it is finished, see if the issue that you are having with the software persists. Often this utility will resolve the issue.
- If the issue is an error message and the Database Maintenance did not resolve it, please write down the whole message or take a screen print of it by clicking on the Print Screen key in the upper-right of your keyboard and then, paste it into **MS Word** or **Wordpad** or **Notepad** and save it to send in an e-mail to Tech Support later.
- When communicating with Tech Support be ready to first indicate the "full" name of the software and the "full", multi-digit version number of the program. You can find this by opening the program and clicking on **Help** and then clicking on **About**. A pop-up window will open that will indicate the "full", multi-digit version number of the program. Sometimes the answer depends on this version number.
- Indicate the steps that you took that lead-up to the problem that you have encountered.
- Indicate whether you were able to run the Database Maintenance or not and whether it had any impact.

Contacting Technical Support

- Version 10 was introduced in November of 2007. We support the "current" version (10) and the "previous" version (9). A "Pro" license allows you to install it at <u>one</u> site and get support for <u>that</u> site. An "Enterprise" license allows you to install it at <u>multiple</u> sites and get support for <u>each</u> of those sites.
- FREE phone support during the 30-day DEMO
- FREE phone support for the first 30 days after you purchase the software
- Technical support for by **e-mail** is ALWAYS FREE. Just go to www.gradiencesupport.com and click on:
o Get Fast Answers to do a keyword search.
o Ask a Question to request help from a Technical Support representative.

Long-Term Phone Support 888-925-7740 (8:30 AM to 6:00 PM Eastern Time Monday through Friday except Holidays)

- **With a Maintenance Plan**: One full year of phone support (not training) for technical issues and FREE software upgrades. For details call 800-999-9111 or 888-925-7740.
- **Without a Maintenance Plan**: You will be charged $29.99 for each call to Tech Support.

Assistance with understanding how to use the software

- **Professional Services**: Get up to two hours of training and help setting up the software. For details call 800-999-9111 or 888-925-7740.

Getting Help

There are several ways to get help throughout the program.

Sample Database

A sample company (called a tutorial database) is provided so you can view the different screens with sample data already filled in. It is recommended that you use the program with the tutorial database to get a feel for the program without having to worry about altering live data. When you are in the tutorial database, no changes are made to your live database. To open the tutorial database, select **Start**, **Programs**, **Gradience**, **Data**.

The Help Menu

From the **Help** menu, select **Contents**. A listing of help topics is displayed. Select the Book that interests you (using a double-click), and then double-click the topic you wish to display.

The F1 Key

Pressing the F1 key is another way to obtain help within the program. From most areas of the program, pressing **F1** will display the topic associated for that screen.

Searching for Help

You can search for Help two ways using the Help File.
Method 1 – From the **Help** menu, select **Search for Help on**. The Help Topics **Index** will appear. Select the **Topic** that interests you.

Method 2 – From the **Help** menu, select **Contents**. Click the **Find** Tab. If you have not used this feature before, the Find Setup Wizard will walk you through setting up the search index. Once the search index has been created, type in the **Keywords** you would like to search for, and the results will be displayed.

A list of typical errors or messages that were known at the time of publication is in **Appendix B – Troubleshooting**.

For more complete information, please refer to one of the following:
- Read me. txt file in the **C:\Program Files\ Gradience\Common** program directory.
- Help File in **C:\Program Files\Gradience\Common** or accessible from the Start Menu.
- Internet Site www.gradiencesupport.com

Importing

You may import only the fields on the **Field Layout** There are two different file formats that you may import from:
- **Tab Delimited** (recommended)
- **Fixed Length**

For a Tab Delimited format, you may use any program that allows you to save as Tab Delimited. Excel and Access are two that will allow this. Tab Delimited is the recommended format.

*Note: You cannot import directly from an Excel file (**.xls** extension). Once you have finished formatting your data in the Excel file, you will need to save as type: Text (Tab Delimited). When entering your information into a spreadsheet such as Excel, you will need to follow the order of the field names according to the Field Layout page.*

For example, the columns should have SSN first, then Last Name, First Name, etc. Also, you will need to leave a blank column for any fields that you will leave blank. For example, following the format on the Field Layout page, we create a Tab Delimited file with the fields: SSN, **Last Name**, **First Name**, [blank column for Middle Initial field], **Location**, **Department**, **Date of Hire**, **Full/Part Time**, [blank column for Title field], [blank column for Employee Code field] and **Active Status**. All of the fields in bold are <u>**required, which means that these columns may not be blank**</u>. We would still need to have a blank column for MI, Title and Employee Code in the order of the fields.

For a Fixed Length format, you may use the DOS Editor or any other editor that shows you the field length. The lengths of each field must correspond to the Length column under the Field Layout page. We recommend using the Tab Delimited format.

Preparing the software for Import
You must create/setup your Locations and Departments in the gradience program before importing. In other words, you must go to **Settings > Locations/Departments** from within the gradience program and enter your locations and department names before importing your data. Please refer to the manual for instructions on creating your Locations and Departments.

Import Field Layout

The following is the field layout for importing text files into gradience. Fields shown in **bold** type are required and all import text files must include them. The alphabetical arrangement as indicated by the letters on the left indicates the columns under which the information would fall within an Excel spreadsheet.

You **MUST** have a column for each type of information **(both "required" & "Not-required" data)** shown below. Only the items in **BOLD** below are <u>**required**</u>. The items not in BOLD below are not required fields <u>but the columns which would contain the non-required information MUST exist even if they are blank</u>. The data may not be required but the column that would contain such data is.

For example:
If no Social Security Number is available, column **A** is still required but may remain blank. The Last Name is required and <u>**MUST**</u> appear in column **B**.

Field Layout Requirements:
Social Security Number 11   123-45-6789
Last Name   20   up to 20 characters

	20	up to 20 characters

First Name

Middle Name	20	up to 20 characters
Location	50	up to 50 characters
Department	50	up to 50 characters
Date of Hire	10	MM/DD/YYYY (slashes required)
Full/Part Time	9	Full-Time or Part-Time (only)
Title	30	up to 30 characters or numbers
Employee Code	14	up to 14 characters or numbers
Active Status	10	Active, Inactive, Terminated

If you have Confidential Employee Record installed, your text file can also include the following fields:

Date of Birth	10	MM/DD/YYYY (slashes required)
Address 1	30	up to 30 characters or numbers
	30	up to 30 characters or numbers

Address 2

Home Phone	30	800-123-4657 (dashes required)
City	30	up to 30 characters or numbers
State (2 character)	2	2 characters, i.e., FL
ZIP Code	15	33325-1234 (-1234 can be omitted)
Salutation	5	Mr., Mrs., Ms. or Dr. (only)
Employee Security Level	16	up to 16 characters or numbers
Security Clearance Date	10	MM/DD/YYYY (slashes required)
Race	25	Must match a valid race on detail tab.
EEO Category	25	Must match a valid category on the detail tab.
Sex M/F	1	M or F only
Driver's License Number	15	up to 15 characters or numbers
I-9 Renewal Date	10	MM/DD/YYYY (slashes required)
Veteran Status	25	Disabled, Vietnam Era, Other Veteran
Office Phone & Ext.	30	800-123-4567 Ext. 123
Fax	30	800-123-4567
Email Address	30	up to 30 characters or numbers
Address Effective Date	10	MM/DD/YYYY (slashes required)

Exporting

The **export** feature is used to transfer basic employee information into a text file that you can open in any word processor or spreadsheet application. Only the basic information (see Field Layout) will be exported.

To export your information, follow these steps:

1. Click **File > Export**.
2. Select **Tab Limited** or **Fixed Length** for the Export File Type.
3. Enter a path and file name or keep the default name.
4. Click **Export**.

Your export file will be created as the file designated in the file block. You may rename the file, but we recommend keeping the file extension of .txt. After exporting, you may open the file from within any other spreadsheet or word processor program.

NOTE: Only the information in the Field Layout will be available for export.

Importing and Exporting Data

The **import** function allows you to add new data from a text file into the Gradience program. Conversely, the **export** function allows you to export data from the Gradience program.

The software you export your data from must be able to export the required information to a Tab delimited or fixed-length text file. See the [required import](#) fields. Please note that we cannot provide support for other software program(s). Please contact the software vendor or manufacturer for more information on how to export data from your other software.

Import Features

Feature	Description
Load File	Loads the selected file into the data window.
Test	This tab will not highlight until a file is loaded. This checks for blank records and ensures that the department and location names that are being imported are already in the database.
Import	This tab imports the file into the database.
Help	This brings up the Help file pertaining to Importing.
Close	This closes the Import screen and takes you back to the main screen.

Feature	Description
Import File	This allows you to enter the path or navigate to the file you will be importing.

File Type	This allows you to select the file type.
	  a. **Tab Delimited** – We recommend exporting or importing as this type of file.
	  b. **Fixed Length** – Gradience may export or import fields with a fixed length.

Skip First Line	This will take out the first row, in case you have headers.
Check Duplicates	This allows you to check for duplicates against the import file and the files already in the database.

Backing Up

How often should you back up?
Every company is different regarding its backup needs. One thing to remember is, "It's not **if** your computer is going to crash, but **when**." They have made great strides in making computers more reliable, but that just makes the time longer before something can happen to your computer.

The following pertains to any data on your computer and not just your Gradience program. Ask yourself this question, "If my computer were to crash right now, how long would it take to re-create (reenter) all of my data without a backup?" Then ask yourself, "If I had to restore from a backup, would I be OK with last week's backup, when I have to re-enter a week's worth of data? Would I be OK with restoring a backup from three days ago?

When restoring your data, the information will be only as current as your last backup. So, if you did a backup two weeks ago and had to restore this backup, you would need to reenter the data that didn't get backed up.

Back up after you make changes to your employee records.
It is recommended that you back up your database after making any significant changes to records. For example, any time you enter several employees or input many changes to absence information would be a good time to back up. You also may set up the DB Monitor to automatically back up at assigned times.

Rotate backups and store backup copies offsite.
A good backup routine is to have at least three sets of backups covering different days of the week. This practice is called **rotation** and reduces your risk of data loss. It is also a good practice to always keep one copy offsite in case of a fire or flood. Consult your system administrator for your company policy regarding data storage.

A **Restore** is when you recover from a backup. There are three different uses for the restore feature. **A Restore may be done only through the DB Monitor**.
1. To overwrite the current data with archived data.
2. To recover from a hardware crash.
3. To move information onto a new computer.

Please keep in mind, when you restore data, your information will be only as current as the backup you are restoring from.

IMPORTANT NOTE
The backup file may be saved only to the Server or Standalone Computer where the **database** resides. The backup creates a zipped file with an extension of .gbk.

Creating a Manual Backup from Within Gradience

To perform a manual backup from within the Gradience program, follow these steps:

1. From within Gradience, go to **File > Maintenance > Backup > Backup Database**.
2. If you are running the backup utility from the Server or at a local PC in which the database resides (Standalone), you will have the option to select where you want to back up to. If you are running the back up utility from a Client (Gradience client install), it will automatically run the backup, saving the data where the database resides.

Creating a Manual Backup from Within DB Monitor

To perform a manual backup from within DB Monitor, follow these steps:
1. Open the DB Monitor program by going to **Start**, **Programs, Gradience Maintenance**and clicking on **DB Monitor**.
2. Enter your login and password. If you do not have access to the DB Monitor Backup feature, you will need to see your administrator.
3. Click the **Backup** Tab.
4. Click **Yes** to the message, **"Do you want to perform a sweep after the backup completes**?" **Note:** A Sweep is a maintenance feature that keeps the database working at peak performance.
5. Click **OK** at the Select Directory screen. It is highly recommended that you keep the default location. **Note:** You may back up only to the Server or standalone computer where the database resides.
6. Click **Close** when the backup is complete.

Scheduling Automatic Backups

To create a scheduled backup, follow these steps:

1. Open the DB Monitor program by going to **Start**, **Programs**, **Gradience Maintenance**, and clicking on **DB Monitor**.
2. Enter your login and password. If you do not have access to the DB Monitor Backup feature, you will need to see your administrator.
3. Click the Backup Tab.
4. Click **New Backup**.
5. Enter the **Backup Type** by selecting **Daily**, **Weekly** or **Monthly**.
6. Enter the military time when you would like the backup to take place.
7. It is recommended to keep the other default settings of Performing Sweep and the path of the backup. A different backup will be created for each scheduled backup. **Note:** The name of the backup will be: [Type]_Backup_[mm-dd-yyyy]_[time] to distinguish it from other backups. For example, Weekly_Backup_08-02-2008_2300, or Monthly_Backup_09_01_2008_1700.
8. Click **Save**. The backup will be performed within a minute of the scheduled time. **Note:** The Server or standalone computer containing the database must be turned on for the backup to complete. If the computer is not on at the scheduled time, the DB monitor will try to create the backup the next time it is opened.

Restoring from a Backup

Remember, restoring a backup will overwrite all data in the current database. **Restore may be run only from the DB Monitor on the Server or standalone computer**. To restore, follow these steps:

1. Go to the Server where the database files are stored. (Restore cannot be done from a Workstation.)
2. Open the DB Monitor program by going to **Start**, **Programs, Gradience Maintenance**, and clicking on **DB Monitor**.
3. Enter your login and password. If you do not have access to the DB Monitor Restore feature, you will need to see your administrator.
4. Click the **Restore** Tab.
5. Click the database to restore.
6. Click **Browse** and double-click the backup you wish to restore.
7. Click **Start Restore**.
8. After Restore is complete, click **Hide** to minimize the DB Monitor.

You may open the program to see your restored data.

DB Monitor

Go to **Start > Programs > Gradience > DB Monitor**.

The DB Monitor allows you to change the Server Name and Database Path, Backup and Restore your database, view database information and clear inactive connections. It also will show you what Gradience version each client computer is running. This is good to make sure everyone is on the same program versions.

Feature	Description
Settings	This allows you to change the Server Name and Database Path.
Backup	This allows you to set up a backup schedule or back up now. See above for creating a backup.
Backup History	This shows all backups completed. You will need to manually delete old backups from within Windows Explorer.
Restore	This can be done only from the same drive in which the database resides. For example, if the database was on a Server, the restore could be done only FROM the Server, not from the Client Workstation. See above for steps on restoring.
Information	This allows you to view how many users are connected to the database and where the current database. The Server Version information is the version of Interbase (database).
Statistics	This gives information on the database. Normally you will not need this information.
Connections	This allows you to view who is connected and any inactive connections that need to be cleared.

Clearing Connections
Go to **Start > Program Files > Gradience** and select **DB Monitor**.

To clear a connection, follow these steps:
1. Make sure all users are out of all Gradience programs.
2. From the **Connections** Tab of the **DB Monitor**, click on the **Refresh** button and make sure all Computer Names have an "N" under Active Connections.
3. Click **Clear Inactive Connections**. This will clear all connections listed with an "N" under Active Connections.

Performing Maintenance and Repairing the Database

The DB Maint is different from the DB Monitor. The DB Monitor utility allows you to view current connections, back up and restore, and view backup history. The DB Maint utility allows you to perform maintenance and attempt to repair a corrupted database.

DB Maintenance Utility

Details:

Note: *This can only be run at the computer where the database is located.*

When should it be run?
- Run it any time that the program performs oddly. If you perform a routine task but get unusual results you may have database corruption.
- We recommend that you also run the database maintenance once per month regardless of program performance.

Why should it be run?
Run this utility to remove database corruption. A database can become corrupt a number of ways.

One way the database can become corrupt is through an electrical interruption. We recommend that any workstation running the software be connected to a UPS (Uninterrupted Power Supply) An inexpensive UPS will give you enough time to close programs and shut down the computer properly after a power failure.

Another cause of database corruption is when someone who is running a Gradience program or Gradience TimeStation that has been minimized, turns off the computer without first closing the program or the TimeStation.

How is it run?
1. Click on their Windows **Start** button.
2. Click **Programs**.
3. Click **gradience**.
4. Click **Maintenance** and select **DB Maintenanc**e.
5. Click the **Start** button that appears on the DB maintenance screen. This should remove the corruption from the database.
6. Close the DB maintenance utility when it is finished and try to open gradience again.

If you have run this utility to resolve a performance issue but the issue persists you have two options:

Option One:
Restore from a recent backup that was made prior to the issue that is now occurring. You will lose any data that had been entered since the time that the backup was made.
Option Two:
Do a backup and attach the backup to an e-mail and send it to Technical Support. Technical Support will "attempt" to remove the suspected database corruption that may be the cause of your underlying issue. Technical Support will return a clean backup to you that you can then restore into your database.

Note: *Although Tech Support clears out corruption in nearly every case, there is no guarantee that they will be successful. Be sure to let Tech Support know what the name and the "full" multi-digit version number of your program.*

To find the "full" version number from within he program click on **Help** (next to **Reports**) and then, click on **About**

Database Repair

If you can't open the Gradience program, we recommend running the DB Maint utility. It will attempt to repair a corrupted database. If the utility does not repair the database, please save screen shots of the error messages and contact Tech Support.

We recommend that you make a backup of your database and send a copy of the backup to Tech Support via e-mail. Tech Support may be able to repair it.
If tech Support is able to repair it, they will e-mail it back to you. You can then, restore it into your database.
If Tech Support is NOT able to repair it, you will be advised to restore the most recent backup that was made before the problem occurred.

DB Maint Features

The DB Maint utility has the following features:

Features	Description
Start	Begins the maintenance or repair.
Cancel	Stops the maintenance or repair process.
Print	Prints the error message(s). The **Print** button will not appear unless there are errors.
Copy	Copies the error message(s) to the clipboard. This will allow you to paste it into an e-mail. The **Copy** button will not appear unless there are errors.
Close	Exits the DB Maint utility.

Note: The DB Maint utility will attempt to repair the database that the hrware.ini file points to. (Go to **Start > Run**, and enter: **hrware.ini**. Locate [HRWARE] in brackets and see the Server name and Path for the directory of the Gradience database.)

Troubleshooting

Here are the most common problems you may experience when using Gradience.

- Unable to connect to Interbase Server
- Getting **SQL Parse Error: EOF in String Detected** message when logging in
- Unable to install on a Win NT or 2000 system
- Exceeded the authorized user count
- Moving database from one location to another
- Installing Gradience files to another drive other than c:\
- Installing Update from one location

Frequently Asked Questions

What is a user?
Simply put, this is the person using the program. They may be entering or viewing data. The Administrator may set specific access to only those features a user will need access to.

How many different users can be set up?
The security file can contain a list of as many users as you desire. For example, each user would have their own login name and password with access rights to specific features.

Can I set up each user to view only his or her own employee information?
Yes. (See Setting Up Access To Locations, Departments and Individual Employees.)

Can Managers view ALL departments or just their own?
You may set up access for managers to view only their departments and/or view specific employees from other departments. You may also set up each employee to have read-only access to his or her records.

Why should I change the default ADMIN password?
The program is set up with a default logins full rights (Admin). We highly recommend changing the password for the Admin Login and set up other logins as necessary.
What is Security Access?

Setting up security access is necessary to allow others access to the program. It is recommended that you do not give out the Login and Password to the Admin login. The Detail screen is the first screen that comes up when going into User Security. You will need to set up access to the common features, the locations and departments' screen, and the specific program features.

Unable to Connect to Interbase Server

Users Affected
Gradience Attendance
Gradience Records
Gradience TimeClock

Issue
When launching one of the programs above, the following message may be encountered:

"This program was unable to connect to your Firebird/Interbase Server. This likely is due to the fact that the default Interbase User Account has been changed. Please provide a User Name and Password with Administrative Privileges to Interbase."

Description
Users may encounter this issue for one of the following reasons.
If running from a Server:
1. If you're using an NT server and trying to install the database files to a drive other than C:\, permissions to the database folder may be incorrect.
2. If running from a Standalone Computer:
3. Interbase Guardian may be shut down
4. If running from a Client Workstation:
5. Incorrect Server Name and/or Database Path
6. Client needs to have TCP/IP installed
7. Server may be down
8. Attempting to launch remotely. Remoting tool cannot resolve "Localhost" or "Name of Server." Change these to the Server's IP address in the hrware.ini file.

Possible Resolution
1. If running Gradience from a Server and encountering the above problem, try each of these solutions:
2. Check your permissions for the Database folder. Full Control access must be given to System for the database folder. You may add to the Permissions by going through Windows NT Explorer and going to Properties by right-clicking the database folder.
3. Check to make sure Interbase Guardian (or Interbase Manager) is running.
4. On a Win 95/98 system, there will be an icon in the system tray (next to the clock). The icon graphic appears as a gray tower with a green flag. When you put your mouse over the icon, it will read, "Interbase Guardian". This icon will not appear on a Win NT/2000 system. You may check to see whether it is running on a Win 95/98/NT/2000 system by clicking on Start, Settings, Control Panel and clicking on the Interbase Manager. If it is not running, click on Start (from within the Interbase Manager), then try to open the Gradience application again.
5. If encountering the message when running from a Client Workstation, try this:
6. Check the Server Name and Database Path by going to the Server, opening the Gradience application and clicking on Help, System Information and printing out this information from the TechSupport Tab. (If you don't have the TechSupport Tab, then you have an earlier version of Gradience and will need to do a screen shot of the System Information screen and Current Users screen and print them out.)
7. Once you have the Server information, go to the Client Workstation you cannot connect to the Server with. From the Workstation, click on Start, Run, and enter: HRWARE.INI. Verify that the Server Name and Database path are the same.

NOTE: The printout of the Server Name and Database path you were asked to print or write down when installing the Server side must be **exactly the same** when entering this information on the Client Workstation(s)!

8. The Client needs to have TCP/IP installed.
9. This is done through the Network Neighborhood Properties. Please see your Network Administrator if you need more assistance in setting this up.

   If everything is the same on the Client as it is on the Server and you're still unable to connect, then try this:

   If your Server has a static IP Address, try entering this for the Server name when installing to the Client Workstation.

10. If running from a Client Workstation and you went through the steps above and it didn't fix the problem, check with your MIS or Network Administrator regarding the status of the Server.

Getting SQL Parse Error: EOF in String Detected

Issue: Getting an error message when logging in. Receive the following error message when logging in: **SQL Parse Error: EOF in String Detected**

Description: This is caused when pressing the comma key (,) and **Enter** key at the same time.

Possible Resolution(s):
Avoid pressing the comma and Enter key at the same time.

Installing Gradience Files to Another Drive Other Than C:\

Issue:
Installing Gradience files to another drive other than the C:\ drive.

Description:
Sometimes installing to the C:\ drive is not feasible. It may not have much space left or it's not meant for database files.

Possible Resolution:
When installing Gradience, there are three sets of files that get installed: Program Files, Database Files and Database Engine Files (Interbase). When choosing Custom Install, you may select the location for the Program and Database Files that get installed at the same time. Interbase automatically will install to the c:\ drive after you click on the first **Finish** button. If this is OK, then you only need to follow Step 1 below and click on Finish. Otherwise, if you also want to install Interbase to another drive, then follow all of the below steps:
1. Run the installation of the selected Gradience program (such as Gradience Attendance , Records or TimeClock. When going through the installation process, choose Custom for the Installation Type. For the next two screens (Program Files and Database Files Location), click **Browse** to choose where to install them.
2. Stop at the point where it says FINISH. Do not click on it. Leave the install window open at this screen. Open Windows Explorer and go to the Windows Temp directory.
3. From the Windows Temp directory, find (or do a search for) IBWin32setup.exe.
4. Double-click on this file to start the installation process. This will install the database engine files (Interbase) and give you the ability to install these files to a drive other than C:\.

Moving Database from One Location to Another

Steps to follow:
1. Install the software on the new server. (See **Installing Gradience**).

    Note: *In the event that you have had your CD for a number of months you may not be running the latest "edition" of the version you own. We recommend that you download the latest 'edition" of your version from our Tech Support web site.*

    Go to www.gradiencesupport.com and click on **Download latest versions**.

2. Download the appropriate program, saving it to the desktop of the server.
3. Install it on the server doing a **Server** installation and then pick **Custom** or **Express**. This will create a new "blank" database on the new server. Take note of the location of the database, return to your client workstation(s)
4. From the desktop of each client workstation click **Start > Run**. Enter **hrware.ini** into the field and click **OK**. A **NotePad** window will open.
5. At the top you will see the following …
    [HRWARE]
    SERVER= (the name of the computer where the database had been)
    PATH= the path to the database)
    The second and third lines may be reversed on your ini file.
6. Edit the **SERVER** name and if necessary, edit the **PATH** line, **Save** and close. This will "point the program on this computer to the new database location. There is no data there yet so the program will not open yet.
7. Go to the computer where the database had been. Open **Windows Explorer** (not internet Explorer).
8. Navigate to the database (**Hrware.gdb**), "**Copy**" it, **Paste** it into a shared folder on the network and close Windows Explorer.
9. Go to the new server and navigate to the shared folder and "Copy" the database (hrware.gdb).
10. Navigate to the new, "blank" database (**hrware.gdb**). **Paste** the copy of the original database into the same folder. This will overwrite the new, "blank" database with a copy of your production database.

Installing Gradience

1. You may install from a CD or from a download.

- **From a CD:**
  Insert the gradience CD, select Install gradience software and double-click on the program to be installed.
- **From a Download:**
  After following the instructions on downloading Gradience to your desktop, double-click on the file to install.

  Note: *To download, go to www.gradiencesupport.com, click on* **Download latest versions***. Select the program that you need, click* **Download** *and then click* **Save***. When the* **Save as** *window opens, put* **Desktop** *in the* **Save in field** *and then, click* **Save***.*

2. You may install as a **Server**, a **Client** or a **Stand Alone**.

- **Server Installation:**
  If installing several gradience programs on your network, only one program needs to be installed at the server.

  When prompted for the type of installation select **Sever**. When prompted for **Custom** or **Express** we recommend **Express**. If you select **Custom** you will be given the chance to "deselect" certain components. We recommend that you leave all components checked. The next prompt will allow you indicate where you want the database to reside. Please indicate a folder on physical drive rather than on the drive directly. An example of a custom path would be…

  j:\gradience\hrware.gdb

  Continue to follow the prompts. You will see a screen that shows where the database is located. Jot this location down or print this screen as prompted. You will use it at the client to verify that it is "pointed" properly to the database.
- **Client Installation:**
  DO NOT map a drive from the client to the server. Our software uses TCP/IP to connect to the database via port 3050. Also DO NOT use UNC (\\) in either the name of the server or the path to the database.

  When prompted for the type of installation select **Client**. When prompted for **Custom** or **Express** we recommend Express. This workstation will look across the network and "self-point" to the data up on the server. A prompt will indicate where this client is "pointed". The client MUST be pointed to the exact drive letter on the server where the database is located, not a mapped drive. Be sure that the path to the database does NOT have double back-slashes (UNC) in the path.
- **Stand Alone Installation:**
  When prompted for the type of installation select **Stand Alone**. When prompted for **Custom** or **Express** we recommend **Express**. If you select **Custom** you will be given the chance to "deselect" certain components. We recommend that you leave all components checked. The next prompt will allow you indicate where you want the database to reside. The database must reside on a physical drive and in a folder on that drive rather than on the drive directly. An example of a custom path would be…

  j:\gradience\hrware.gdb

Possible Launch Error:
If after installation, you attempt to open gradience software from a remote location you may encounter an error message. Some remote-access software cannot resolve **Localhost** or the **"name"** of the server that can be found in the **hrware.ini** file of the server, client or stand alone workstation respectively.

Resolution:

1. 1. Remote to the desktop of the PC where you are attempting to open the program. (Server, Client or Stand Alone PC)
2. 2. Click on **Start > Run** and enter **hrware.ini** into the field and click **OK**.
3. 3. Second line from the top, change the "Server Name" or "Localhost" to the IP Address of the computer where the database is located.
4. 4. **Save** and close the NotePad. Re-launch the program. If this fails, "physically" go to that computer to launch it.

Install Update from One Location

Issue:
When a new update is released, you must install at each client workstation(s) and at the database server. These instructions will show you how to set up the Gradience folders to install only the new update once from one central location.

Description:
Setting up one shared directory for the program files will make updates quicker and easier.

Possible Resolution:
These instructions will explain how to set up the Gradience program files in one shared location to make updating easier:

1. **Copy the Gradience installation file(s) to a shared directory.** The Server and all workstations that will have (or already have) Gradience installed should have access to this shared directory on the network. If you downloaded the Gradience update from our Web site (www.gradiencesupport.com), then you will have only one file. If you have a Gradience CD, then you will need to copy the appropriate Gradience program keeping all of its folders intact. For example, while navigating the Gradience CD through Windows Explorer, under the **BIN** folder, you would copy the **Atcon70** folder to the shared directory.
2. From the Server (or computer where the database resides), navigate to the shared directory, and run the Server installation (even if the Gradience program already is installed on the Server) by following these steps:
    1. At the **Setup Type**, select **Server**. Click **Next**.
    2. At the **Installation Type**, select **Custom**. Click **Next**.
    3. At **Select Components**, leave the defaults. Click **Next**.
    4. At the **Program Files Location**, click **Browse** and navigate to the Shared directory. Add **Gradience** to the end of the Path.
    5. At the **HRWare Database Files Location**, click **Next**.
    6. Write down or print the Server Name and path. These will be needed for the Client installs. Click **Close**, then **Next**. This will install the Server files.
    7. If the **Interbase** install starts, click **Next** to install it; otherwise, go to Step **H**.
    8. Go to Client Workstation.
3. From the Client Workstation, navigate to the shared directory, and run the Gradience installation (even if the Gradience program already is installed on the Workstation) by following these steps:
    1. At the **Setup Type**, select **Client**. Click **Next**.
    2. At the **Installation Type**, select **Custom**. Click **Next**.
    3. At **Select Components**, leave the defaults. Click **Next**.
    4. At the **ProgramFiles Location**, click **Browse**, and navigate to the **Gradience** shared directory created during the Server install. Click **Next**.
    5. At the Database Server Information screen, enter the Server name and database path exactly as shown from the Server install.
    6. Click **Next**. This will install the program files.
    7. Follow the above steps for any other Client Workstations that will have Gradience installed.

When the above steps are completed once, then when you need to install an update, only steps 1 and 2 (a-g) need to be completed. All users must exit the Gradience program(s) before updating. All of the shortcuts on the Client Workstations will be pointed to the shared directory that will be updated when the Server install is completed.

Unable to install on a Windows 2000 system

Issue: Doesn't finish installation.

Description: This usually happens if you do not have full administrator rights on the Windows 2000 computer.

Possible Resolution(s):
Make sure you have full administrator rights before installing.

Exceeded the Authorized User Count

Issue:
You have exceeded the authorized user count. Your product license allows up to [number of licensed users] simultaneous users. There are # connections at this time.

The # connections is a number greater than one that changes each time you close and reenter the program.

Description:
Users may experience this problem when closing the program by clicking Exit under the File menu. Users who exit the program by clicking the close window icon in the top right corner <u>will not</u> experience the problem, but we still recommend downloading and installing the latest update.

Possible Resolution:
Download and install the latest Gradience program from our Updates area on our Web site at: www.gradiencesupport.com.

Please follow the installation instructions. After downloading and installing the update, follow the steps below to clear the connections.
1. Close Gradience and any other Gradience Programs that are open.
2. Open DB Monitor and log in, if it is not already running. The DB Monitor resides on the computer where the Gradience database is installed.
3. Click the **Connections** button.
4. Click the **Refresh** button to verify all connections are "N" (not active).
5. If all connections are "N", then Click the **Clear Inactive Connections**button. This will reset the connections.
6. If you wish to close the DB Monitor (not recommended if you have automatic database backups scheduled), right-click on the icon **Gradience Database Monitor** in the system tray area; select **Shutdown Database Monitor**, and click **OK** to close DB Monitor.
7. Otherwise, click the **Hide** button.

Adding Attachments to Comments or Notes

Each Comment or Note field allows you to insert an attachment to that field. Attachments can be a Microsoft®Word Document, Microsoft® Excel spreadsheet, PDF, Rich Text Format, or even a picture file. Attachments may be linked to a file, displayed as an icon or inserted into the field.

Insert Object Options

Create New
Selecting **Create New** allows you to insert a new object that you want to create from scratch. For example, selecting **Create New** and clicking on **Microsoft® Word Document** for the Object Type and then clicking **OK** will bring up a blank Word Document for you to enter text. When you close out of the Word Document it will appear in the Comments field. Double-clicking on the Word Document object will bring up Microsoft® Word so that you may again edit the document.

If the Display As Icon option is checked, then the Word Document (or object type) will appear as an icon in the Comments field.

Create from File
Selecting **Create** from **File** will allow you to insert an existing object type, such as a Microsoft®Word document, PDF file or Excel spreadsheet. Normally, this will be the option you will use for every day use.

If you do not select the Link or **Display as Icon** option, then the object type will be inserted into the Comments field. In other words, you will see the text as you would see the text on a Word Document within the Comments field. Double-clicking on this text in the Comments block will bring up Microsoft®Word so that you may edit the document.

We recommend selecting the Display as Icon option when inserting an object. This inserts the object type within the Comments field; however, it shows as an icon. When you double-click on the icon, it brings up the object within the program that created it.

The **Link and Display** as Icon options will perform the following, depending on your selections:
Selected

Link	Display As Icon	Results
		Inserts the contents of the file as an object into your document so that you may activate it using the program which created it.
X		Inserts a picture of the file contents into your document. The picture will be linked to the file so that changes to the file will be reflected in your document.
	X	Inserts the contents of the file as an object into your document so that you may activate it using the program that created it. It will be displayed as an icon.
X	X	Inserts a shortcut that represents the file. The shortcut will be linked to the file so that changes to th file will be reflected in your document.

Inserting an Attachment

To insert an attachment, follow these steps:
1. Locate the Comment or Note field you want to insert an attachment into.
2. Right click on this field and select Insert Object.
3. Select **Create from File**.
4. Click **Browse** to navigate to the file you want to attach and click Open.
5. Select **Display as Icon**.
6. Click **Change Icon** and change the Label, if necessary, to make the name more descriptive.
7. Click **OK**, then **OK** one more time.

Using the Notes/Comments Editor and Attachments

Gradience Records 2008 includes new, powerful word processing features for all comments and notes fields, as well the ability to attach objects and documents within these fields. When documenting employee absences, you may find it useful to attach, copies of e-mails, Word or Excel attachments that you've used for tardies, warnings and specific sections of reviews Gradience Forms personnel forms for vacation requests, FMLA requests and company responses, warnings and counseling reports

Right-Click Menu Commands

Right-click on any notes or comments field – the menu shown at right will pop up with the following options:

- Edit – Opens the full text editor
- Cut – Copies to the clipboard and deletes the currently selected text
- Copy – Copies the currently selected text to the clipboard
- Paste – Pastes the currently selected text into the comments or text field
- Font – Brings up a standard font edit window, with settings for font, style, size, effects and color
- Bullet Style – Toggles bullets for selected paragraphs on and off
- Paragraph – Brings up a standard paragraph settings window for alignment style, indentation, and line spacing
- Tabs – Lets you set tab stops for selected paragraphs
- Find – Searches for the text you enter
- Replace – Searches and replaces text according to your settings
- Insert Object … – Opens the Insert Object window and lets you select either a type of new object to insert into the notes / comments field or attach an existing file
- Check Spelling – Launches the Microsoft®Word spell checker

Using the Rich Text Editor

When you right-click and select Edit, the text editor opens in a separate window, giving you access to all Right-Click Menu commands in a word-processor-like environment. Here's a brief overview:

Toolbar

	New	Creates a new document.
	Print	Prints document.
	Find	Finds specified text.
	Spell Check	Checks spelling. Requires MS Word installed.
	Cut	Cuts selection and puts it on the clipboard.
	Copy	Copies selection to clipboard.
	Paste	Pastes selection from clipboard.
	Undo	Reverses the last action.
	Redo	Reverses the last Undo action.

Format Bar

MS Sans Serif	Font Type	Changes the font selection.
8	Font Size	Changes the font size.
B *I* <u>U</u>	Bold, Italic, Underline	Changes the font to Bold, Italic or Underline.
	Font Color	Changes the font color.
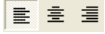
	Left, Center, Right Alignment	Changes the text to Left, Center, or Right Alignment.
	Bullet	Inserts Bullet.
	Highlight	Highlights selected text.

USB Fingerprint (BIO) Reader Setup Guide

1. From within the management portion click on **Settings > Global Preferences > Fingerprint Reader**.
2. Then click on **Edit** and check **Enable Fingerprint Reader** and then click **Save**. You will have to close out of the program and reopen it for that change to take effect.
3. After opening the program, enter the management portion.
4. Select the first employee that needs to have their fingerprint registered and then click on **Time Clock Access**.
5. On the right side of the screen under the title **Fingerprint** click on **Add**. A new screen will appear giving you the steps to follow for registering fingerprints.