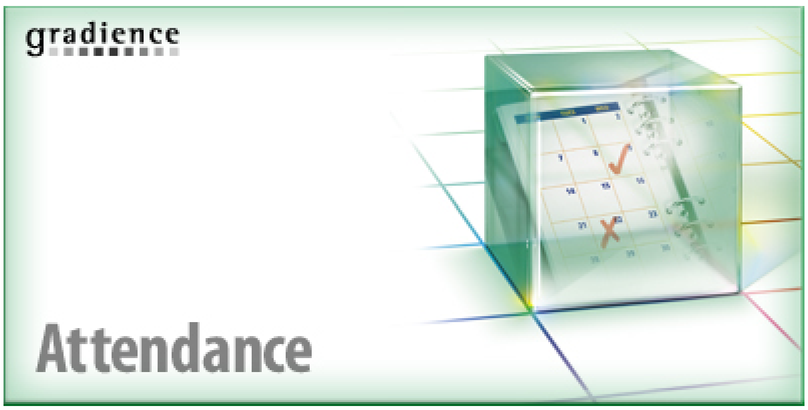
Gradience Attendance™

User Manual



Welcome!

Thank you for choosing Gradience Attendance 2007™ for tracking employee absences and time off. Our software application includes many features based on the suggestions of our customers, and we certainly welcome any further comments or improvements you may have.

When combined with other Gradience software such as Gradience Records 2007® and Gradience TimeClock 2007®, this powerful tool helps you keep critical employee information without entering data twice.

Gradience Attendance makes it easy to record employee absences for employees quickly, lets you see time off at a glance and run detailed reports. In addition, the program figures Time-Off balances with credits and debits just like a checkbook. Gradience Attendance also helps reveal excessive employee absences, which can provide solid evidence for employee discipline or termination. The following features in Gradience Attendance will make your job easier and keep you organized:

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.
- **Calendar**– Entering absences is easy! Just two clicks and you're done. You can also enter unlimited notes.
- **Reminders**– Set pop-up reminders for important dates, such as employee anniversaries, birthdays and reviews.
- **Time-Off Plans** – Once you have set up your Time-Off Plans, Gradience Attendance will automatically compute your employees' benefit credits, debits, carryovers and balances.
- **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 Attendance 2007 - New Features

A large number of improvements have been added to Gradience Attendance. The list of changes include:

- **Accrual System** – Accruals are processed faster and more accurately than ever before.
- **AutoUpdate** – With the AutoUpdate feature you can set the application for automatic updates or manually check for updates at any time.
- **Easier to Upgrade** – Upgrading is handled by the Gradience product key entry system. You can upgrade Gradience with a new key from inside the program.
- **Encryption Added** – Encryption of confidential employee information is now possible in Gradience 2007 in the **Global Preferences > Global Settings > General Settings** tab.
- **New Interface Design** – There's a whole new look and feel to Gradience, which is even easier to use than ever! For customers using Gradience Attendance in concert with Gradience Records or Gradience TimeClock, a single login/password still grants you access to all three programs.

Unlocking the Demo

You can unlock your demo copy after a new installation, or after you have already 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 if you have it, or click Next to continue installing the application to run Gradience in Demo mode.
- After running the applications in Demo mode, you will periodically be reminded of the Demo trial period remaining and given the option to purchase Gradience Attendance, Records, or TimeClock.

Previous Installation

If you have already installed the demo of Attendance, you can unlock it by following the steps listed here.

- Open Gradience Attendance.
- Select **Alter Current Product License** from the Help menu.
- Select **EDIT** for the program you want to unlock and enter the Product Key you received with your purchase. This will be located inside the Gradience CD sleeve and/or sent to your e-mail address.
- Click OK. If the confirmation message does not appear, verify that you entered the correct key. The Product Key is not case sensitive.

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

System Requirements

Minimum

Windows XP Home (SP2), Windows XP Professional (SP2), Windows 2000 Professional

Pentium III or Higher Processor
128 MB available RAM (Random Access Memory)
30 MB available hard disk space
Access to a CD-ROM drive
SVGA monitor with 800 x 600, 16-bit color depth or higher

Recommended

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 Firebird 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
- **Server with a static (persistent) IP address – PC or Server where the database resides**
- **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 a WAN license based on the number of geographic locations. 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.

License Options

The license options currently available:

- **Basic** – Only one user can run the program at a time.
- **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.

CD Menu Instructions

To begin installing Gradience Attendance, please follow these steps:

1. Close ALL running programs.
2. Insert the **Gradience 2007** 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 prior to installation. You must have proper network rights in Windows 2000, XP, or Vista in order to install Gradience software.
5. When installation is complete, the Gradience program group will be added to your Start menu and a Gradience Attendance icon will appear on your desktop.

Setup Types

- **STANDALONE**: Use this option if you are installing to a standalone computer. This will install both the program 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 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.

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 Attendance 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.

Installation Overview

Gradience Attendance can be installed on either a single STANDALONE workstation or via your LOCAL 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 directory for the purpose of backup. Please consult your network administrator before installing to a network directory.

Installing to a Network

To install to a network requires these items:

- **Windows-based Server or PC** – The included Firebird 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 that the database will be always 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 a WAN license based on the number of geographic locations. 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 http://www.gradiencesupport.com.

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

Client-Server Installation (Network)

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).

Server Installation Instructions

Install to the Server first by following these instructions:

1. Insert the Gradience CD on the Server. (Follow the CD Menu Instructions above.)
2. At the **Setup Type,** select **Server**. Click Next.
3. Select Express. Click Next.
4. **IMPORTANT**: Write down the Server Name and Database Path EXACTLY as they appear on the screen.
5. Click "I have written this information down." Click **Close.**
6. Click **Next** at the **Current Settings** screen. This will install the program files to the Server.
7. Click **Finish.** This will start the installation of the database files.
8. Click **Next**, then the **I Agree** button if you agree to the license.
9. After the installation, click **Finish**.
10. Follow the installation instructions for the Client Workstation.

Note: You only have to run the Server installation *once*. Afterward, you may install multiple Clients for any purchased Gradience product such as Attendance, Records, or TimeClock. As always, you can still run any of the programs in **Demo** mode until to try out the software before purchase.

Client Workstation Installation Instructions

Install to the Client Workstation by following these instructions.

1. Insert the Gradience CD on the Client Workstation. (Follow the CD Menu Instructions above.)
2. Select **Client** as the Setup type.
3. Select **Express**, then click **Next**.
4. Enter the Server Name and Database Path exactly as you wrote down from Step 4 of the Server Installation. Then Click **Next**.
5. Click **Next** at the Current Settings screen. This will install the program files to the Server.
6. Click Finish. This will start the installation of the needed files to run the database.
7. Click **Next**, then the **I Agree** button if you agree to the license.
8. After the installation, click **Finish**.
9. Install the Client for any other Gradience versions. (You do not have to install to the Server again.) You may also install to other Workstations, if needed.
10. Double-click on the desktop application shortcut. To login, use the default Login (**ADMIN**) and default Password (also **ADMIN**).

Standalone Computer Installation Instructions

Installing to a Standalone Computer is quick and easy. Follow these steps:

1. Insert the Gradience CD on Standalone Computer.
2. Select **Standalone** as the **Setup Type**.
3. Click on **Express**, then click **Next**.
4. Click **Next** at the Current Settings screen. This will install the program files.
5. Click **Finish**. This will start the installation of the database files.
6. Click **Next**, then the **I Agree** button if you agree to the license.
7. After the installation, click **Finish**.
8. Double-click on the desktop application shortcut; the default Login and Password are **ADMIN**.

IMPORTANT NOTE FOR VERSION 6 AND EARLIER USERS Gradience software does not share the same database with version 6 or earlier.You will need the Gradience version to share the database. Contact Technical Support for more details 888.925.7740.

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 this type of connection.

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

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

Upgrading from Version 8 to Gradience 2007

If you're upgrading from version 8 to Gradience 2007, we recommend backing up your current data first, then simply run the installation program for Gradience 2007. Your database will be automatically converted the first time you start the program.

Upgrading from Version 7 to Gradience 2007

If you're upgrading from version 7 to Gradience, simply install Gradience 2007 on top of version 7. Opening Gradience for the first time will update the database to Gradience. The Gradience program must have exclusive use of the database to perform the update. Because all Gradience programs share the same database, you must upgrade all programs from Version 7 to Gradience at once. Using a version 7 application with a Gradience database could result in data loss.

Version 6 and Below

If you're upgrading from version 6 or below, you will need to upgrade to version 6 (if not already installed), and then convert the data to Gradience. Version 6 is on the Gradience CD under the **BIN\Legacy** directory.

Please contact Technical Support for more details on this procedure.

Getting Started

After installation, open the program. For first time users, enter the program using **Login: Admin** and **Password: Admin.**

We highly recommend changing the default password by going to **Settings** > **User Security**. If needed, set up access for others that will need to continue setting up the program. If you need to give access to specific locations and departments, or individual employees, set these up first and then come back to User Security and complete your desired security access settings.

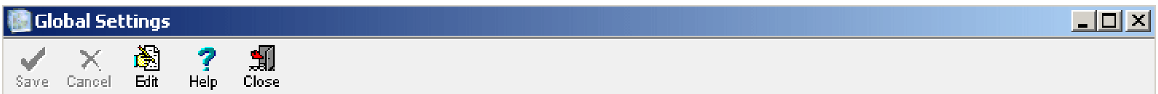
Before we move on, though, let's discuss how Gradience products function.

Navigating Gradience

In general, Gradience software products work like most Windows programs. However, there are some differences in behavior you should note which will make working with Gradience much easier.

The Edit Button

Before you can edit text in most Gradience windows, you will first need to click the **Edit** button from the main button bar (shown below). This button is a safety feature and, once clicked, allows you to edit items on the window, tab, or page in question.

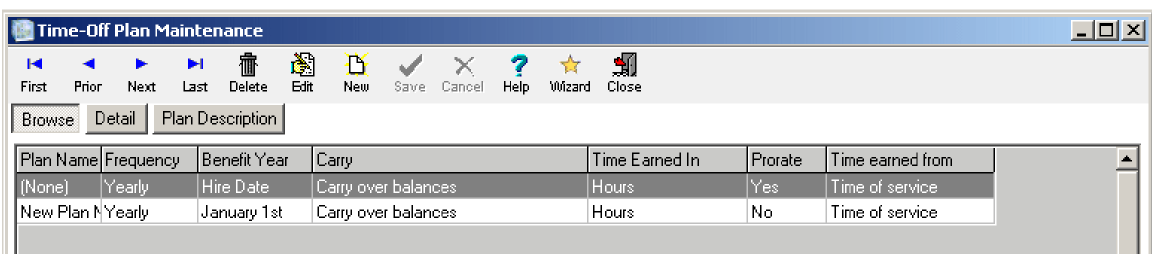


Saving Records

Some programs save information immediately after entering the information in the data field. Gradience, however, saves data when you click the **Save** button on the main button bar. This feature allows you the chance to edit your information and make changes without committing those changes immediately to the database (a time saving feature).

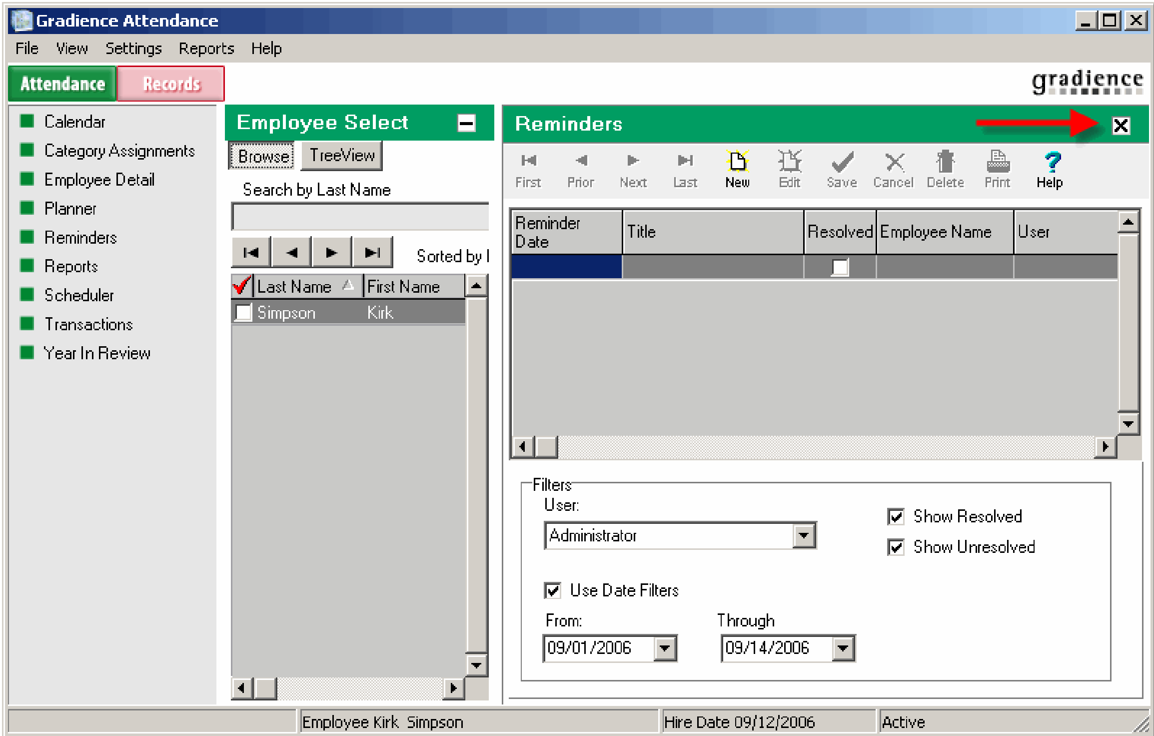
Buttons Behave Like Tabs

Some windows, such as the one shown below, contain buttons designed to summon additional data entry areas. In these cases, the buttons act like popular "tab controls" used in a variety of Windows applications. You may think of the buttons as the label part of a tab, since clicking them has the same effect (namely, activating the data entry area associated with that button).



About Closing Panes with the X (Close) Button

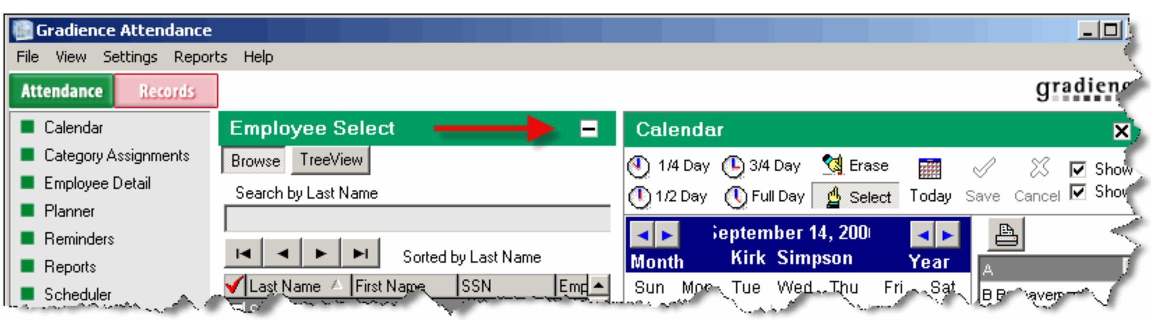
In Gradience, it is possible to have many different types of data entry windows open at the same time in the right hand side "pane" of the application (see graphic below). Consequently, this means those panes are still open (and available for data entry) until you specifically close them using either the Close icon or the **X** button in the color bar to the right. In the graphic, the red arrow points to the **X** (Close) button which you can use to close a window in the right pane. Remember, windows which you previously opened will appear ***beneath*** the current window in this pane until you explicitly close them!



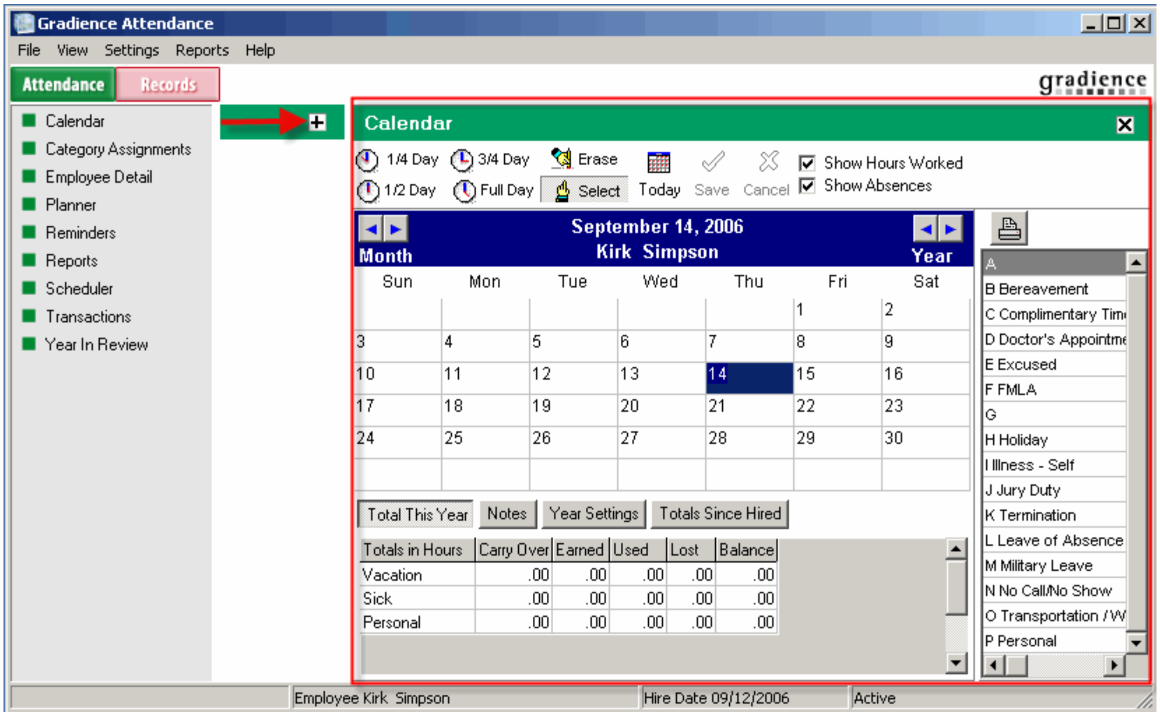
Minimizing and Maximizing Panes

In addition to being closed, panes can also be minimized and maximized. In the first of two following graphics, notice the (-)Minus button next to Employee Select in the left pane, just to the right of the red arrow. When clicked, this button will minimize the left pane allowing the right Calendar pane to expand into the extra space (see second graphic below, and notice the Calendar area enclosed by a red box has become larger). This feature is handy when you are working with limited viewing space as might occur on a small or older monitor.

Both panes maximized



Left pane minimized



Good Luck!
If you have questions about any issues navigating Gradience, please contact Technical Support via email or phone.

Checklist for Setting Up

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

- If you are upgrading from version 8, install the Gradience version then run the new program. For version 6 and below, please contact Technical Support at 888.925.7740 or visit us online at www.gradiencesupport.com.
- Change the **Admin** password by going to **Settings** > **User Security**. If need be, set up access for other users who will need to continue configuring the program. If you need to give access to specific locations and departments or individual employees, set these up first and then come back to **User Security** and complete security access setup.
- Create Locations and Departments
- Set up Global Preferences.
- Set up Time-Off Plans.
- Set up Absence Categories.
- Set up Holidays.
- Set up Absence Codes.
- Enter employee information and assign Time-Off Plans.
- If necessary, complete user security setup via the **Security Maintenance** window > **Detail** tab and/or **Attendance** tab.

Creating Locations & Departments

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

Locations and Departments are required and must be assigned to each of your Employees (See Adding New Employees to assign Location and Department information to employees). 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 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 can then be assigned to Locations. Follow these steps:

1. Click on **Settings** and then **Locations and Departments**.
2. Click **New** and then select the **New Location?** menu item.
3. Enter the location name.
4. Click **OK**. If a helpful tip message box appears, read the tip and click **OK** to proceed.
5. Click **New** again to create other locations.
6. Now, click **New** and select the **New Department?** Item.
7. Enter the Department name.
8. Click **OK**.
9. Repeat the above steps as necessary for new locations and departments.
10. After all **Locations and Departments** are created, click the **+** sign next to the **Location** in the right pane.
11. Assign Departments by selecting (placing a check in) the box next to the **Department** name.

    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 that 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, you may need to restart Gradience Attendance before the changes become available for selection.

Global Preferences

To access **Global Settings** go to **Settings** > **Global Preferences**.

The **Global Settings** screen allows you to control your default program settings, such as **Company Info**, **Report Options**, and specific program options.

If you are setting up for the first time, please follow the **Checklist** order.

NOTE: Before editing any of the Global Settings, you must first click the **EDIT** button.

Company Info Tab

The **Company Information (Info)** screen lets you enter your company name, address and logo. The company name is required as this will print out on **Reports**. Having a company logo is recommended, but not required. If you have one, this will also print out on Reports.

- **Company Name** (required for report headings)
- **Address, City, State, Zip** and **Country Code** (optional)
- **Company Logo** (optional) If you have your company logo available, you can have this logo appear on reports. Attendance supports file formats which should be sized to 200x200 pixels. Enter the directory where the file is stored or use the Browse button to locate it.

Editing Company Info

1. Click **Edit**.
2. Enter or change information as needed.
3. To add a company logo, click **Assign New Logo.** Navigate to where the directory path is and click on the logo, then click **Open**.
4. Click **Save**.

General Settings

The **General Settings Tab** allows you to set the program defaults such as the Epoch setting, default hours in a day, and SSN format, among others.

- **Epoch Setting** – We strongly recommend keeping the default settings. This setting will allow the 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 03/05/78, the program will interpret this as 03/05/1978.
    - If you enter a date of 03/05/01 within the program, it will be interpreted as 03/05/2001.
- **Note:** If you need to enter a year prior to 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 will automatically come up in the xxx-xx-xxxx format. The label is the title that will appear on the Employee Detail screen (SSN by default).
- **Encrypt Data** – Click the **Encrypt Data** button to encrypt sensitive information in the HRWARE database. You will be prompted to enter a key, then click **OK**. You should see the message "**Finished Encrypting. This application will now close.**" when the process completes. You will then need to manually restart Gradience Attendance.
- **Allow use of Forgotten Password Utility** – This option allows access to a utility that can be used, only with assistance from Technical Support, to gain access into the Gradience program. In order to use this feature, we require a statement on company letterhead signed by a Supervisor be sent by fax or mail stating that the user is allowed full access to the program. Call Technical 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 may not be able to be repaired. 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.

- **Note:** If the database 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. 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.
- **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.
- **Remember last "Login Name"** – If checked, this option remembers and populates the Login Name box when you first start Attendance.
- **Tips** – If checked, the tip on how to use the **Locations Department Maintenance** window will always appear.
- **National ID Number Format** – This box allows you to select your preferred format for the **National ID Number** (Social Security Number for U.S. users). You may also specify a text label to describe the ID Number inside the **Label** box.
- **Automatic Updates** – If checked, this option enables the **Automatic Update** functionality which periodically checks for new versions of the Gradience software.

Report Options Tab

These settings affect how reports will appear by default:

- **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 or not Totals show up on reports

Attendance Tab

These options reflect how settings in Attendance will be affected.

- **Display Mode** – This shows employee totals in Days or Hours throughout the program, depending on your choice.
- **Fiscal Date** – If used, the Fiscal Date will affect Time-Off Plans set to accrue on the Fiscal Date.
- **Display only Absence Codes with Descriptions** – This allows you to view only absence codes that are set up in the Absence Code Maintenance screen without a description (Absence Code Description is left blank).
- **Retain Original Absence Class Settings** – This gives you the option to keep original absence class data and create new assignments. For example, say you had the absence code “A” assigned to category Vacation, so every time you put the absence code “A” onto the calendar the program would assign the time used to Vacation Used. Then due to

a new company policy, you need to assign the code “A” to Personal time; having this option checked would save the previous absences to the old category and any new absences would be assigned to the new category of Personal Time. Un-checking this option would allow all time used for the code “A” to be entered under the new assignment.

- **Show Warning on Weekend Assignments** – If you attempt to mark an absence on a Saturday or Sunday, a warning will notify you.
- **Show Warning on Assignments to Inactive Employees** – If you attempt to mark an inactive employee absent, a warning will notify you.
- **Show Warning on Assignments Before Hire Date** – If you attempt to mark an employee absent before he or she was hired, a warning will notify you.
- **Prompt for Time-Off Wizard** – If checked, this option summons the **Time-Off Wizard** after clicking **New** in the **Time-Off Plan Maintenance** window.

Accrual Schedule Settings

Schedule Actions – If **Run** is selected, this tells the program to run an accrual automatically once each day according to which days are selected. If **Remind** is selected, Attendance will remind you to run accruals. If **No Action** is selected, the program will neither run accruals nor remind you to perform accruals.
Remind Frequency – This allows you to select the frequency of the accrual reminders.
Default Hours in a Day – When entering a new employee, these amounts will be the default and show up in the Day Hours block on the Detail screen.

Setting Up Absence Categories

To access the **Absence Category** screen, go to **Settings > Absence Category Maintenance.**

The Absence Category Maintenance screen allows you to create categories and then assign **Time-Off Plans**to the category. An absence category (or absence category title) is a name or category heading. This is used to label the available categories of stored totals. You may have a category such as Vacation, Sick, Personal, PTO, etc. (See Time-Off Plans for information on setting up a Time-Off Plan.) You may have an unlimited amount of categories.

Assigning a Time-Off Plan to the absence category allows accrued time and lost time to be shown under that category. For example, you have a **category** called *Vacation*, and assign an **accrual table** called *Vacation – Full-time* to it. Remember that a category is a title, and a Time-Off Plan is the actual plan of how your time off policy works. When employees who are assigned to the Time-Off Plan called *Vacation – Full-time*, their accruals will appear under the category **Vacation** under the **Total this Year Tab** on the **Calendar** screen.

Setting Up Holidays

To access Holidays, go to the **Settings** menu, then **Company Holidays**.

Overview
This section allows you to designate the dates of specific company holidays on the calendar. Holidays that have not occurred will automatically apply to an employee when you enter them into the program. The Holiday will show as an H on the calendar. You may sort by the Holiday name or by date.

Note: Holidays cannot be added or deleted for employees that have locked Gradience TimeClock Time Card Runs during the same date range. (For example, if you're deleting a holiday and you have a Time Card Run that covers the same date, the program will not allow you to delete the holiday from those employees listed under the locked Time Card Run.)

Adding Holidays

To enter a holiday, follow these steps:

1. Click Settings from the main menu and select Company Holidays.
2. Click New to add a company holiday.
3. Enter the name of the holiday you wish to add.
4. Press TAB on the keyboard, and enter the date of the holiday (mm/dd/yyyy) or click the drop-down arrow and navigate to the date.
5. Select Full Day, ¾ Day, ½ Day, or ¼ Day for how much credit for this holiday will be given. This amount corresponds with the Day Hours block on the Employee Detail screen.
6. Click Save.

Deleting a Holiday

To delete a holiday, follow these steps:

1. From the Company Holiday screen, click on the holiday you wish to remove.
2. Click Delete.
3. Click Yes to the Warning box. This will remove the holiday from all employee calendars.

Editing a Holiday

Only the holiday name can be edited. If you need to change a holiday date, you'll need to delete the holiday and then re-add it. To edit an existing Holiday Name, follow these steps:

1. From the Company Holiday screen, click on the holiday you wish to edit.
2. Make the necessary changes.
3. Click Save.

Setting Up Absence Codes

To access Absence Codes, go to **Settings > Absence Code Maintenance.**

Overview

Absence Codes are letters that are on the calendar to indicate an employee absence. It is important to assign your absence codes to the proper categories before marking any codes on the calendar.

There are 22 absence codes. You may change the description of 21 of them. The description of Holiday (H code) may not be changed, but you may change the settings for "Count Against Perfect Attendance" and "Assigned Absence Category." Each letter can be assigned to one of the absence categories, which are labeled in Global Preferences. Once an absence code is assigned to a category, whenever you put that absence code on the calendar, the time for the absence is shown in the Used column for that category.

For example, absence code C–Complimentary Time is assigned to the Personal Category. When the absence code C is put on the calendar, the time will deduct from Used time in the Personal Category.

Total This Year | Totals Since Hired | Notes | Year Settings

Totals in Days	Carry Over	Earned	Used	Lost	Balance
Vacation	22.88	1.06	3.00	.00	20.94
Sick	.00	.50	.00	.00	.50
Personal	.00	1.00	.13	.00	.87

To edit the Absence Code Description, follow these steps:
1. Click in the **Description** box.
2. Enter the new description.
3. Click **Save.**

To change the Absence Category, follow these steps:
1. Click in the category box.
2. Click on the drop-down arrow and select the appropriate category.
3. Click Save.

Attendance & TimeClock Code Sharing

This topic explains TimeClock Code Sharing, a procedure which helps you set up code sharing between Gradience Attendance and Gradience TimeClock.

Gradience Attendance and Gradience TimeClock can be fully integrated. This means that a shared absence code for paid time off entered in Attendance automatically creates time entries in TimeClock, and vice versa.

Example: Linda takes a vacation day, and her supervisor enters this time as a Vacation (Reason Code) in Gradience TimeClock so that she is paid for that day. With Gradience integration set up, this time will also show on the calendar in Attendance as a V – Paid Vacation day.

In order to set up Attendance and TimeClock Code Sharing, the following steps will need to be completed in the order listed:
1. Setup Reason Codes
2. Setup Payroll Code Descriptions
3. Enable Attendance Code Sharing
4. Set up Related Attendance Absence Codes

Enable Attendance Code Sharing

The first step is to enable (turn on) the Attendance / TimeClock integration. You would do this from **Settings > Global Preferences > TimeClock** Tab.
1. Under Attendance Code Sharing on the TimeClock Tab, click Enable Code Sharing.
2. You may also select Enable Hours Worked Transactions Relation if you are going to enter Hours Worked (W Code) on the calendar in Attendance. With this option selected, when a W Code is entered on the calendar screen the time will also be automatically entered in TimeClock.

Set Up Reason Codes

After turning on the **Gradience Attendance Code Sharing,** the next step is to set up **Reason Codes**. You may already have Reason Codes set up; if so, go to the next step of setting up payroll code descriptions. Reason Codes allow you to select specific reasons when entering a manual time entry. Some examples of Reason Codes are: Vacation, Sick, Personal, Computer Down, Corrected Time Entry, etc.

Note: You will only have Reason Codes if you have purchased **Gradience TimeClock**, our superior solution to your timekeeping needs. If you have not already done so and wish to order, call (888) 925-7740 for TimeClock purchase details.

Example: Using the example above where Linda takes a vacation day, when the supervisor enters a manual entry in TimeClock to record the time off, the time is entered as 8 hours, and the reason code is Vacation.

Feature	Description
Reason Code	**Reason Codes** are required reasons when changing a punch entry or entering a manual entry.
Payroll Code	**Payroll Codes** are descriptions that will show on reports and time card runs, related to Reason Codes and Absence Codes.

Feature	Description
Related Attendance Absence Code	**Related Absence Codes** will allow absences that are entered on the Calendar screen to also be reported in TimeClock.

To set up Reason Codes, go to **Settings > Reason Codes**.

Entering a manual time entry, whether correcting an entry, or entering time for someone out on vacation, requires a reason. The three types of reasons are: Punch Changes (making a change to a punch time entry), Manual time entries (entering a time entry for 8 hours Vacation, etc.) and Deleted time entries.

The Reason Code window can be broken down into three parts:
Reason Code, **Payroll Code Description**, and **Related Attendance Absence Code**.

Set Up Payroll Code Descriptions and Number

A Payroll Code Description is related to a Reason Code and Absence Code. The Payroll Code is the description that will show up on reports (such as the Time Card Runs report).

Example: A **Reason Code** of Vacation is set up. When someone takes a vacation day, a manual entry (from the TimeClock Entries screen) is created and given the Reason "Vacation." A **Payroll Code** Description of Vacation is set up relating it to the **Reason Code** (Vacation). When a time card report is run it will show the Payroll Code Description of Vacation (the Payroll Code is what will appear on reports). When that manual entry with the Vacation Reason Code is created, it will also create an entry on the Calendar in Gradience Attendance under the V- Paid Vacation absence code.

Set Up Attendance Absence Codes

Once the Attendance Integration is enabled, you will be able to relate Reason Codes in TimeClock to Absence Codes in Attendance. When you enter an Absence Code onto the Calendar that is related to a Reason Code, this will create an entry in TimeClock.

Example: We have a **Reason Code** of Vacation = **Payroll Code Description** of Paid Vacation **= Related Attendance Absence Code** of V – Paid Vacation. When entering a **V** Code on the Calendar of 8 hours, the time will automatically be entered in TimeClock as 8 hours of **Vacation**

(Reason Code). In addition, this time will be shown on the Time Card Run report as 8 hours of **Paid Vacation** (Payroll Code Description).

How Code Sharing Works

With code sharing set up, this is how it will work:

From the Calendar screen, we enter a **V** – **Vacation** day (Related Absence Code) on June 4, 2004.

From the TimeClock Entries screen, we can see it reports the 8 hours as Vacation (Payroll Code Description).

If we double-click on the Changed By Date at the bottom of the TimeClock Entries screen, we can see Vacation as the Reason for Change (Reason Code).

And we can see that it shows our columns of Paid Vacation (First Column) and Paid Personal (Second Column) with 23 hours Paid Vacation showing for Neil Adams.

And it will work the opposite way: If we enter a manual entry in TimeClock, it will display in Attendance.

Security Options

Due to the confidential nature of information stored in Attendance, 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 Attendance 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 **View > 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.

New! 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 (after remembering to click the **Edit** button first) click **Decrypt Data**. Your data will no longer be encrypted.

Program Access

The program is set up with a default **Login** named **ADMIN** and default **Password** of **ADMIN**. We strongly recommend changing the password for the **Admin** login and set up other logins as necessary.

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 but instead set up other user logins to access only those features that they will need. 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 as well as the program-specific features.

Common Features

Features under the User Security Features Tab are shared among Gradience Attendance, Records and TimeClock. For instance, **Locations and Departments** are common to all three programs, as are **Global Settings**. Even if you only have one of the listed programs, you will need to follow these instructions to set up user access rights.

User Security – Detail Tab

Detail Tab (Common Features for all Gradience applications):

- **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.
- **Database Restore** – This allows access to Restore from the DB Monitor.
- **Alter Product License** – This allows access to change one or more Product License.
- **Conversion**– This allows access to run the Conversion Utility.
- **Custom Reports** – This allows access to create/modify Custom 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. (We recommend EasySoft's ODBC-Interbase 6 Driver, available at www.easysoft.com.)

Setting Access

Setting up access to common features (**Detail Tab**).

1. Click **New** from the **User Security** > **Detail** screen.
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.**

User Security – Attendance Tab

Once the above steps are completed, follow these steps to set up access to specific program features:

1. Navigate to **User Security** > **Details** and click on the **Attendance** button.
2. Select what type of **Feature Access** users will have by clicking in the **Access Rights** field. Clicking on the arrow will allow you to select from the following:

   YES/NO – toggles access on or off for the selected feature
   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

3. When finished, click **Save**.

Program Features - Attendance

You have the ability to change access features for these items:

- **Year in Review** – Allows user to view this features and print Year in Review reports.
- **Category Assignments** – Allows user to view and edit Time-Off Plan assignments under Category Assignments.
- **Planner**– Allows user to view and print reports.
- **Transactions**– Allows user to view, edit and print transactions using the Transactions feature.
- **Absence Code Maintenance** – Allows user to view and edit Absence Codes.
- **Time-Off Plan Maintenance** – Allows user to view and create Time-Off Plan settings.
- **Absence Notes** – Allows user to view, edit and print absence notes and attachments.
- **Holiday Maintenance** – Allows user to add/delete/edit Holidays.
- **Modify Initial Balances** – Allows user to add/delete/edit Initial Balances in the Category Assignment feature.
- **Calendar**– Allows user access to the Calendar screen and to add/edit employee absences.
- **Absence Category Maint** – Allows a user to create/edit category titles and assign Time-Off Plans. Category Title examples: Vacation, Personal or Sick Time.
- **Perform Accrual** – Allows user to access the Perform Accruals screen under File/Maintenance Menu to accrue time according to the assigned Time-Off Plans.

- **Transaction Utility** – Allows user to access the Remove Transactions screen under File/Maintenance and remove unwanted accrual balances, as well as reset the Last Accrual Date.
- **Import Hours Worked** – Allows the user to import hours worked data (W codes) for employees.
- **Scheduler**– Allows the user access to the new **Scheduler** feature.

User Security – Location / Department Tab

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 Data**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**.

User Security – Other Tabs

For instructions on setting up user access to any other Gradience program (Gradience Records or Gradience TimeClock), please see **User Security** in the appropriate user manual.

Forgotten Password Feature

Attendance has a **Forgotten Password** feature that can be used in case of forgotten or lost passwords. Because of security concerns, this utility can only be used in conjunction with Gradience **Technical Support.** To get password help, please follow these instructions:

1. Fax a statement on your company letterhead to our **Technical Support** team, signed by a manager or supervisor, authorizing you to have full access to the security feature within the program. **Example Statement:** (authorized name and title) is authorized to have full access to the (name of program). Signed by (supervisor name, title and contact information).
2. Once the fax is sent, contact Technical Support. The representative will walk you through the correct procedure allowing you to get back into the program.

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***

Using Gradience Attendance

Gradience Attendance is now easier to navigate and use than ever before. Even better, if you have other Gradience software installed, such as **Gradience Records** and **Gradience 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** and the **Recent Features Pane**.

If you have not already read about how Gradience programs work and behave, please read the Getting Started topic for information which will save you time and effort!

The Menu Bar

File Menu

Maintenance

- **Perform Accruals** – This allows the program to accrue time according to your Time-Off Policies as defined under Settings/Time-Off Plan Maintenance.
- **Remove Transactions** – This allows you to remove transactions before re-running accruals.
- **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 Import and Export)
  Delete Employee – Deletes an employee from the Browse or Employee Detail screens.
  Note: This cannot be undone and deletes all data for the selected employee!
  Import WorkedHours – Imports hours worked from a Tab-delimited file (SSN, Date Worked, Amount of Hours Worked). (See Import Worked Hours).

Exit
MRU (Most Recently Used) 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)
Checklist – Displays Checklist screen that helps you set up the program

Settings Menu

User Security - Allows configuration of Attendance-specific User Security items.
Global Preferences - Allows configuration of global preferences for any installed Gradience program.
Guest Users - Allows for configuration of Guest Users.
Locations / Departments - Provides access to Locations and Departments maintenance window.
Time-Off Plan Maintenance - Configure Time-Off Plans using this window.
Absence Category Maintenance - Allows for maintenance of Absence Category details.
Absence Code Maintenance - Allows for maintenance of Absence Codes.
Company Holidays - Provides workspace for specifying Company Holidays.

Reports Menu

Previews and prints up to 19 reports and charts, as detailed below:

Reports
Attendance Detail
Employee Summary
Employee Balance
Employee Anniversary
Perfect Attendance
Absence Detail
Absence Notes
Bank Report
Group Absences by Type
Worked Hours
Planner
Transaction Detail
Year in Review
Adjustments
Reminders

Charts
Absence Over Time
Absence By Type

Location Comparison
Department Comparison

You can also print or preview table information by selecting the Table Listings menu item.

Note: you can also access this list and select a report by clicking **Reports** on the left **Feature Column**.

The Program Bar

The **Program Bar** 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 2007 – **Green**
Gradience Records 2007 – **Red**
Gradience TimeClock 2007 – **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 Attendance, and select **Employee Detail** from the feature column, you will see a **green** 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.

TreeView 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, TreeView mode could show you at a glance.

Tip: In TreeView, 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.

Recent Features Pane

This is a list of the most recently used features. Clicking on a feature from this list will bring it up in the **Feature Screen**. It's a quick way to get back to a previous screen.

Elements of the Calendar Screen

You will likely use this screen more any other because it is where you enter absences and notes. Here is an overview:

Absence Codes – To place an absence, you will first select one of these codes, then select a tool for placing the code on the calendar for the selected employee.

Calendar Screen Tools

- **Full Day** – Sets the amount of hours taken for an absence to the normal day hours (usually 8 hours for a Full-Time employee). Normal day hours are taken from the Detail screen.
- ¾ **Day** – Sets the amount of hours taken for an absence to ¾ of the normal day hours (usually 6 hours).
- ½ **Day** – Sets the amount of hours taken for an absence to ½ of the normal day hours (usually 4 hours).
- ¼ **Day** – Sets the amount of hours taken for an absence to ¼ of the normal day hours (usually 2 hours).
- **Erase**– Allows you to delete absences from the calendar.
- **Select** – Clicking on Select allows you to enter notes on a specific day without entering an absence.
- **Today**– Changes the calendar to the current day.
- **Save** – Saves current changes. If you select another employee, changes will be saved automatically.
- **Cancel** – Cancels current changes.
- **Show Hours Worked** – This feature allows you to toggle the display for Hours Worked on the calendar. Hours Worked is time entered on the calendar with a "W" code or from the day's totaled Gradience TimeClock entries.
- **Show Absences** – Allows you to toggle the display for absences on the calendar. Absences are time entered on the Calendar with any of the absences (A – V) code.

Employee Balance Tabs

- **Total This Year Tab** – This shows the employee's current benefit year totals.
- **Notes Tab** – This allows you to enter comments for a specific day; a new feature of Version 9 is that you can also attach any file to the notes field now.
- **Year Settings Tab -** This shows assigned Time-Off Plans (tables).
  Note: Negative balances will show in yellow. As well, realize that absence codes entered on future calendar months will affect employee balances negatively because accruals will likely not have been run for future months.
- **Totals Since Hired Tab** – Shows total balance since the employee was hired.

The following symbols may be seen within calendar days:

- **Magnifying Glass** – This denotes partial day absences or that there are multiple absence codes places for that day. For example, if an employee is set up with eight hours (as set up on the Detail screen – Day Hours), the magnifying glass icon would be displayed when any single absence posted on the calendar was less than eight hours.
- **Asterisk**– This denotes a note or comment on this day. After selecting the day, click on the Notes Tab to view the note.

Recording Absences

Follow these steps to record an absence for an employee, such as vacation:

1. Select an employee.
2. Select the desired month of the calendar, if necessary, by using the arrows on either side of the calendar. Arrows on the top left side of the calendar change the month. Arrows on the top right side change the year. This will be the month the employee takes an absence.
3. Using the mouse, click an absence code from the Absence List so that it is highlighted, then click a date on the calendar. Notice that the Full Day option is selected (above the calendar). This is the default setting when selecting an absence. To choose a different day increment, choose from ¼ day, ¾ day, or ½ day at the top of the calendar before selecting an absence.

Note: As you add absence codes to the calendar, the time is automatically deducted on the Totals Tab. For example, if you select the absence code "V" and click on the Calendar, a full day is automatically deducted from the Used Vacation time under the Total This Year Tab. The full day assignment is set from the Day Hours block on the Employee Detail screen.

Adding New Employees

The **Employee Detail** screen allows you to add new employees, and view and edit existing employee records.

NOTE: Before adding new employees for the first time, follow the checklist to set things up in the proper order.

Follow these steps to add a new employee to Gradience Attendance:

1. Click the **New** icon. Enter at least 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.)
2. Required Fields –
   - First and Last Name
   - Hire Date – date employee was hired
   - Work Status – Full or Part Time
   - Employment Status – Active, Inactive, or Terminated
   - Location – Current location
   - Department – Current department
   - Hours (Day and Week) – This is the amount of hours an employee works or is considered absent for a typical workday and workweek. (For example, you could have Day: 8 hours and Week: 40 hours) When you put a full day absence onto the calendar, it pulls the hours from this field. These numbers are used as defaults when assigning codes to the calendar and when generating report totals.
3. Assign a Time-Off Plan to an employee, follow these steps (this assumes you have already defined Absence Categories and Time-Off Plans):
4. From **Category Assignments**, click on the **Assigned Time-Off Plan** row. This will bring up a drop-down arrow.

5. Click on the drop-down arrow and select the appropriate Time-Off Plan. (See Time-Off Plan Maintenance.)
6. Click **Save.**

Deleting Employees

You can only delete an employee from the Browse Detail or Employee Detail Feature. To delete an employee follow these steps:
1. Click on the **Employee Detail Feature**.
2. Select the employee you want to delete.
3. Click **File** > **Delete Employee**.
4. Click **Yes** to delete.

WARNING: Deletions are permanent! You cannot undo this action.

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 200x200 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. Click on the **Employee Detail** button.
2. Select the employee you want to add a picture to.
3. Click **Edit Picture**.
4. Click **Assign New Photo**.
5. Navigate to where the employee picture is. 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 quicker.
6. Click **OK**.

Twain Import

The Twain Import feature 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 Photo tab and click on Twain Import.
6. Click the Select Source button and then on your camera name. You may have one or two options available.
   6.1. [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.

6.2. 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.

A. Taking a Picture and Importing it into Gradience

Continue following these steps from Step 6.1 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.

B. Downloading Pictures from Camera Disk

Continue following these steps from Step 6.2 above:

1. After selecting this option, click **OK**.
2. Click the **Download** button to download the pictures to your computer.
3. Select the picture you want to import then click **Transfer.**
4. Click **OK** to select this picture.

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

Save 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 off to a different directory.

1. Click **Personal Contacts**, then the **Photo** tab.
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.

Category Assignments

After setting up your company Time-Off Plans (see Time-Off Plan Maintenance), you'll need to assign the Time-Off Plan(s) to each employee. Each Absence Category must be assigned a Time-Off Plan (at minimum "None") or accruals will return errors.

Here's how to assign a Time-Off Plan:

1. Click the Category Assignments Feature. **Note**: If you are setting up for the first time, there will be three (3) default Absence Categories shown (Vacation, Sick, Personal) along with the default Time-Off Plans that were set up in the Absence Category Maintenance (see Setting Up Absence Categories).
2. To assign (or change) an Time-Off Plan, click in the block across from the Absence Category you would like to assign. For example, double-click in the Assigned Accrue Plan block across from Vacation; this will bring up a drop-down list.
3. Choose the Time-Off Plan to associate with the Absence Category. For example, choose the Full Time Vacation plan. This is the plan that will be associated with the category Vacation. Whenever an accrual is run, the accrued time, as set up in the Full Time Vacation plan, will be put into the Vacation block on the employee's Calendar screen.
4. Click Save.

Note: All Absence Categories must have an Time-Off Plan assigned; at minimum the "None" plan should be assigned. For example, if you have a part-time employee that does not accrue any Sick or Personal time, you would assign the (None) Time-Off Plan to the Sick and Personal categories.

Initial Balances

An **Initial Balance** is a starting balance for an employee and should only be entered once. For example, an employee is transferred from another location and has five vacation days left. You may enter his Initial Balance of 5 days or 40 hours, depending on your program display settings of day or hours (see Global Preferences). An initial balance may also be where an employee receives a certain amount of vacation, sick or personal days when he or she is hired.

Entering Initial Balances

To enter an Initial Balance, follow these steps:

1. From **Category Assignments**, click in the **Initial Balance Earned** field on the row of the selected category, such as the **Vacation** row.
2. Enter the amount of time in hours or days, depending on your setting in the **Global Preferences**. **Note:** When entering a negative balance to the Initial Used block, do not add the minus sign (-) to the amount. This column is automatically negative.
3. Click in the **Initial Date** field and click on the drop-down arrow.
4. Select the date of the **Initial Balance**.
5. Click **Save**.

Printing Reports

There are two ways to print employee information: 1) from a selected feature's print icon and 2) from the Reports menu, either from the pull down menu at the top or the Reports feature on the left.

Printing from a Feature

Each feature, such as Employee Detail, Category Assignments, Calendar, Year in Review, etc., has a Printer icon that allows you to print the report associated with that feature. For example, to print the Employee Detail report from the Employee Detail feature you would select an employee and click on the Printer icon. You do not need to click in the checkbox if you're going to print only a single employee. To print the report for multiple employees, click the checkbox next to each employee name in the Employee Select Column, then click the Printer icon.

Printing from the Reports Menus

Reports selected using the top pull-down menu or the Reports feature in the Feature List appear in the right Feature Pane along with additional filters and options. You may print a report for a single employee or multiple employees.

Tip: If you're going to print a report for a whole department or location, you can use the Employee Select Column TreeView Mode to select quickly.

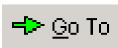
Year In Review

The **Year In Review** feature is used to view selected categories of absence and work-time codes for a selected range of months. To access this feature, click on **Year In Review** from the **Feature List**.

Absences Tab

Using the **Year in Review** tab, you can access **Absences** notes and go to the selected day in the main calendar. By default, the current year will be shown. To pick another date range, use the up/down arrows to scroll to the desired date. The letters on the **Year in Review > Absence** calendar are the absence codes that are on the main calendar.

– This lets you enter notes on a specific day. An asterisk on the calendar denotes this.



– This will take you to the selected day on the calendar.

– A plus sign next to a code denotes more than one absence code on same day.

– Letters on the calendar are the absence codes for specific days.

Settings Tab

The **Year in Review > Settings** tab gives you several options.

- **Only Show Months with Activity** – Checking this option and then clicking back on the Absences Tab will show only months that have absences on the calendar.
- **View Absences Assigned to:** – This option allows you to select only the absence categories you want to view on the Absences Tab.
- **Absence Code Reference List**
  Sort – **Absence Class** or **Absence Code**
  This allows you to sort by **Absence Class** or **Absence Code** to quickly show the assigned absence category. For example, you may need to know that the code **S – Suspension** is assigned to category **None** instead of category **Personal.**

Transaction Editor

The **Transactions** feature allows you to view employee balances in a checkbook-like journal. You also may enter time manually and edit existing time. To access it, click on the **Transactions** feature button.

Adding a Transaction Entry

To add a new entry, whether Earned or Used time, follow these steps:

1. Click on the **Category** you want to add or deduct time from (for example, **Vacation**, **Sick** or **Personal** button.)
2. From the **Transactions** Features pane, click on New.
3. Click Yes.
4. From the Edit Transaction window, enter the following:
   1. **Transaction Date** – Enter the date of the transaction.
   2. **Transaction Type** – (select one)

- **Adjustment to Earned** – Select this option when you want to show a debited manual adjustment. The Transaction Detail report will show: “Adjustment to Earned,” which is credited (giving time).
- **Adjustment to Used** – Select this option when you want to show a credited manual adjustment. The Transaction Detail report will show: “Adjustment to Used,” which is debited (deducting time).

- **Loss: Carry Over** – Select this option if you want to show a manual carry over loss. The Transaction Detail report will show: Loss: Carry Over (deducting) of amount. A carry over loss happens at the end of a selected time period, usually at the end of a benefit year in which the employee is not allowed to carry over a specific amount of time.
- **Loss: Exceeded Max Balance** – Select this option if you want to note exceeded time. The Transaction Detail report will show: Loss: Exceeded Max Balance. An exceeded max balance loss happens when an employee's balance exceeds the Max Balance setting in the Time-Off Plans.
- **Time Earned** – Select this option if you want to show earned time. The Transaction Detail report will show: Earned. This option is normally used if you enter all your time in manually.
- **Time Used** (absence code) – Select this option if you want to show used time. The Transaction Detail report will show: Used: (absence code). You may either drag an absence code to the calendar or manually enter the used time through the Transaction Editor.

6. **Amount in (Days or Hours)**– This will show Days or Hours, depending on your display setting in Global Preferences. Enter the amount of time to be earned or deducted. **Note:** Do not add a minus sign (-) to this field if you're deducting time. Selecting a Loss or Used time above will automatically deduct the amount of time.
7. **Transaction Notes** – Enter any comments related to this transaction.
8. Click **Save** to keep this transaction or click Cancel to not keep it.

Editing Transactions

To **Edit** any transactions, follow these steps:

1. Click on the **Category** you want.
2. Click on the transaction that you want to edit.
3. Click **Edit.**
4. Click **Yes.**
5. Make any changes necessary.
6. Click **Save** to keep changes.

Importing Worked Hours

This feature allows you to import 'W' transactions (Worked Time) into the database. **Please note**:You must have entered your employees first. This will only import hours to existing employees. The worked time will also be posted into Gradience TimeClock if you have Code Sharing turned on. Follow these steps to import hours worked:

1. Format a Tab delimited or fixed length text file with the following order:
    - **SSN**– ###-##-#### (11 characters long) or ID
    - **Date**– MM/DD/YYYY (10 characters long)
    - **Amount**– ##.## (5 characters long)
2. Validate the file using a text editor like Notepad or WordPad.
3. Go to **File** > **Import Hours Worked**.
4. Select the type of file (**Fixed** or **Tab Delimited**).
5. Click **Select** to browse to your import file.
6. Click **Test** to verify there are no errors associated with the file.
7. Click **Import** to complete the process.

Planner

The **Planner** shows you how many absences have been marked on the calendar for each month by ***letter code.*** The difference between the **Planner** and the **Year In Review** is that the **Planner** shows absences mainly by the absence code. The **Year In Review** shows absences mainly by month. Otherwise, everything is the same.

Printing Planner

To print the **Planner** report, follow these steps:

1. Click on the **Reports** menu, and select **Planner. (**Planner Report, for more details on the report interface).
2. Select your report options and the employee(s) you want to report on.
3. Select **Preview,** then the printer icon to print.

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 **Resolve**.

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

Use Date Filters
The **From Date** and **Through Date** filters can be enabled here to show Reminders only for the selected date range.

Creating a New Reminder

There are two types of reminders in Gradience:

- **One Time Reminders** – These are reminders that are only meant 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 2007 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 that 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, I-9 Renew, or Performance Review.
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 may also 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 that this reminder is about, you'll need to delete the reminder and then re-add 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 may also resolve reminders from the Open Reminders screen.

Scheduler

The Scheduler is a new feature that displays overlapping days off at a glance. You may view time off by department, location or specific employees. You may also view by specific absence codes.

Viewing Time Off

To view time off follow these steps:

1. Select Scheduler.
2. Select employees under the Employee Select column. **Note**: To quickly select a department or location, click the TreeView button under the Employee Select column.
3. On the Schedule Tab, select the date range you wish to view and then click Refresh. We recommend selecting one or two months at time when viewing as selecting more months can slow performance when scrolling to the right.
4. Select the Filters Tab if you want to view on specific absence codes. Click Refresh from the Schedule Tab to refresh the data.
5. Clicking the Go to Calendar button will take you to the Calendar for the selected employee.

Sorting

Right-clicking anywhere on the Scheduler grid allows you to sort by:

Name
Title
Location/Name
Location/Title
Department/Name
Department/Title
Location/Department/Name
Location/Department/Title

Note: A bullet next to the sort order designates the current sort.

Moving and Resizing Columns in the Scheduler

Moving Columns
Moving a column allows you to view data more easily. To do so, simply click and drag the Title column heading left or right. An arrow displays where the column will be “dropped.”

Resizing Columns
Sometimes you may not be able to see all of the data in a column because another column is overlapping. To move the column, move your mouse pointer directly between two columns until you get the resize icon (two arrows pointing in opposite directions). Then click and drag with your left mouse button to the left or right.

The Calendar Pane

The **Calendar** Pane (select **Calendar** from the **Features** list) allows you to log absences and work time on the calendar, view employee totals, log notes onto specific days and search for employees in a quick, efficient manner.

1. **¼, ½, ¾, Full Day** – Use these in conjunction with the work time (W code) and absence codes to log time used and worked.
2. **Erase** – To erase an entry, click on Erase and then click on the absence code on the calendar.
3. **Select** – Click on Select when you want to add a note to a specific day. Clicking on Select allows you to click on the calendar without adding an absence code.
4. **Today** – This selects the current day and month.
5. **Display Hours Worked** – This allows you to toggle time worked codes on and off.
6. **Display Absences** – This allows you to toggle absence codes on and off.
7. **Totals This Year** – This shows current year totals.
8. **Totals Since Hired** – This shows totals since employee was entered in the program.
9. **Notes** – This allows you to put notes on specific days. To add a note, click on Select (above the calendar) and click on a date on the calendar; then click on the Notes Tab. An asterisk (*) will show on the calendar on the days with notes. Right-clicking brings up text editing and insert object options.
10. **Year Settings** – This shows current year and Time-Off Plan settings.

Assign Absence or Work-Time Codes to the Calendar

To assign an absence or work-time code to the calendar, follow these steps:

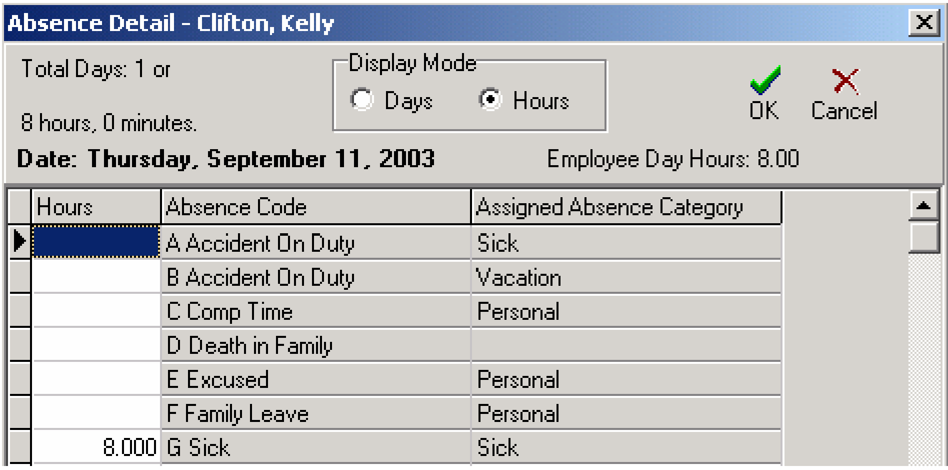
1. Click the **Calendar** feature from the Features list on the left.
2. **Select the employee** you want from the Employee Select Column.
3. Using the **Absence Code List** on the right, select the absence or work-time code you wish to record. For example, select **V** for **Vacation.**
4. Using the buttons above the calendar, select the amount this code should apply to the total of hours used, for example, **Full Day**.

Note: **¼,** ½ or ¾, the program will calculate the appropriate amount of hours from the Hours field on the Employee Detail feature.

5. Select the **Calendar Month** and **Year** using the arrows above the calendar.
6. Click once on the date you wish to apply the absence or work-time to. Time will automatically be deducted on the totals (below the calendar).

Absence Detail

The Absence Details window allows you to edit partial and multiple absences. To access this, select the date on the calendar, then right-click and select **Absence Detail.**



You may enter time down to 6/10th of a minute (or 1/100th of an hour). (See Minutes to Decimals Conversion Table below.)

To enter time for an absence using the **Absence Detail** screen, follow these steps:

1. Click on **SELECT** button above the calendar, then click on the day you wish to add an absence.
2. Right-click on the calendar and select **DETAIL.**
3. Click in the appropriate Hours block and enter the time in decimals down to .6 (1/100th of an hour). The Total Hours will show in decimals and hours along with the date.
4. Click **OK** and click **Save** on the **Calendar** screen.

Note: When entering time into the **Absence Detail** screen, the time must be entered in decimals. When converting the minutes, they must be in .6-minute increments. To keep things simple, you may want to round the time to 6-minute increments (see second column below).

Minutes to Decimals Conversion Table

Minutes Decimal Minutes Decimal
0. 0 = . 00 6 = . 1
. 6 = . 01 12 = . 2
1. 2 = . 02 18 = . 3
1. 8 = . 03 24 = . 4
2. 4 = . 04 30 = . 5
3. 0 = . 05 36 = . 6
3. 6 = . 06 42 = . 7
4. 2 = . 07 48 = . 8
4. 8 = . 08 54 = . 9
5. 4 = . 09 60 = 1. 0

Formula for converting minutes to decimals: minutes divided by 60. Minutes must be in 6 minute increments.

Manual and Automatic Accruals

An accrual (the amount of time off that has accrued for each employee) can be run manually or automatically. An automatic accrual occurs when the program is set to run an accrual on a daily or weekly basis depending on the Accrue Schedule settings under the Gradience Attendance Global Preferences Attendance Tab.

Automatic Accrual

For an automatic accrual to run, you must set the schedule and select the Accrue Automatically box under the Global Preferences Attendance Tab. Then, whenever the program is opened for the first time during that day according to the schedule, the program will accrue automatically. For example, if your schedule is set only to Mondays, then every Monday when the program is first opened, the program will run an accrual.
Note: We recommend running the first couple of accruals manually to make sure the Time-Off Plans are set up correctly.

Manual Accrual

A manual accrual occurs by clicking on the Run Accrual button when the Perform Accruals screen displays. The Perform Accruals screen will display when the program is first opened (if the Accrual Schedule is set up), or you may go to File, Maintenance, Perform Accrual.

1. Go to File, Maintenance, Perform Accruals and click on Run Accrual. Click Cancel to abort running the accrual
2. Once the accruals are finished, you have the option to preview, which allows you to see the current transactions that took place, or post accruals, which posts the transactions to the employee's records.

The **Perform Accruals** window allows you to run a manual accrual. This will accrue time, such as vacation, sick or personal time for employees according to their assigned Time-Off Plans.

Run Accrual – Clicking this button runs a manual accrual. The program will accrue your employee's vacation, sick and personal time according to the Time-Off Plans you set up. (See Time-Off Plans.) The program will normally run an accrual starting one day after the last accrual date through today's date. (For example, if the last accrual date was December 31, and an accrual was run on January 15, the program will accrue time for anybody that needed to be accrued within those dates (from January 1 through January 15). January 15 will now become the last accrual date. The next time an accrual is run, it will accrue from January 16 through today's date.
Cancel Run – This aborts the run.
Preview – This shows a print preview of accrued time.
Post Accruals – This posts the accrued time from the run to employee records.
Exit – This closes the screen. Note:If accrued time has not been posted, then clicking on Exit will also cancel the accrual run.
Accrual last performed on mm/dd/yyyy – This is the last accrual date. This denotes the last time an accrual (whether manual or automatic) was run. The next accrual will run from one day after the last accrual date to today's date.

Advanced Options

- **Accrue Thru Date** – This is an advanced feature, and normally you will only want to accrue through today's date. This feature will allow you to accrue up to any date as long as it's after the Last Accrual Date. The option **Enter Custom Date** under **Accrue Through Date Options** must be selected for this option to be available.
- **Accrue Through Today** – This is the default that the program is set to and will accrue from the Last Accrual Date through today's date.
- **Enter Custom Date** – This option allows you to select any date to accrue through as long as it's after the Last Accrual Date. (For Example, if the Last Accrual Date is December 31, and today's date is January 15, the program will normally accrue from January 1 (one day after the Last Accrual Date) through January 15. With this option selected you may accrue through any date that is after December 31 – not just through January 15).
- **Report Group Settings** – Once an accrual is run, you will have the option to Preview the accrued time. This allows you to make sure your time given is working correctly before

posting. On the Preview you may sort by Location and Department to view the Accrual Summary report.

Export a report – When inside the **Print Preview** window, click the **Export** icon on the menu bar. This tool allows you to **Export** in one of the following formats:

RTF file
Excel table (OLE)
E-mail
Text (matrix printer)

PDF file
Excel table (XML)
JPEG image
BMP image
TIFF image
HTML file

See Reports for more information.

Remove Transactions

To get to this screen, go to Settings, Maintenance, then Remove Transactions. This screen allows you to remove unwanted transactions and reset the last accrual date so that you may start accruing from a specific date. This is also suggested if you've just entered your employees and already set up your Time-Off Plans and you want to accrue from Jan. 1 of the current year or any other date.

Removing Unwanted Transactions

Use these instructions when removing unwanted transactions. This will allow you to remove all accruals (earned time & losses), adjustments, used time, or just certain categories. **Note:** Using the Remove Transactions Utility will not remove any Initial Balances. If you have entered Initial Balances, you will need to remove these manually.

1. Create a backup before proceeding! (Backup and Restore.)
2. Select a Begin Date – This will remove transactions starting from this date. This is also the date that the Last Accrual date will start from, if selected.
3. Select an Ending Date – This will remove transactions up to, and including this date. (For example, enter 01/01/01 for the Beginning Date and today's date for the Ending date.)
4. Select one or more of the following:

- Accruals – removes earned and lost time (but not adjustments).
- Adjustments – removes manual adjustments (Adjustment to Earned or Used time).
- Used – removes used time (but not adjustments)
- Reset Last Accrual date – the Last Accrual Date is the date where the program will start accruing from. This allows you to reset the last accrual date to the Begin Date. (e.g., accruing from 01/01/01)
- Remove Transactions for Active Employees only – will not remove transactions for Inactive or Terminated employees.
- Remove Transactions applied to these categories: None, Vacation, Sick, Personal (you may have more than just these categories).
- Click Run Process.

Using the Transaction Utility does not run any accruals. You will need to run a manual accrual to accrue time. It will remove accruals according to the Begin and End date and reset the Last Accrual date to the Begin date. Before running an accrual, make sure your Time-Off Plans are set up correctly. (See Setting Up Time-Off Plans) **Note**: If you're not sure which options to choose, use the defaults; these are the common settings. Select your Begin Date and End Date and click on Run Process.

Resetting the Last Accrual date

You may want to reset only the Last Accrual date. For example, you've just entered all your employees and want to begin accruing from Jan 1st.

To reset the Last Accrual date, follow these steps:

1. Deselect all options EXCEPT the reset last accrual date option.
2. Enter your begin date.
3. Enter your end date.
4. Click Run Process.

Using this process will NOT remove or run any accruals. It will only reset the last accrual date to the begin date. For example, if you selected 01/01/03 for your begin date and 06/31/03 for your end date, and checked only reset last accrual date, the program will reset the last accrual date to 01/01/03. When you run an accrual, either manually or automatically, the program will start accruing from this date. The end date is not important, but it is required. You may have any end date that is equal to or after the begin date. Note:Before running the accruals, make sure your Time-Off Plans are set up.

Time-Off Plans

Gradience Attendance helps you manage your attendance with your Time-Off Plans. Based on your company Time-Off policy, you can define how often employees will earn time off, how they can carry over their balances from year to year and how much they will earn based on length of service.

Explaining Accruals

When an accrual is run in the Gradience Attendance program, it calculates employee absences from the last accrual date up to the current date or your computer's date. The time calculates according to the settings in your Time-Off Plans. The accruals can run as often as once per day. For example, if you ran your last accrual on March 15, 2003, (your last accrual date), and if you ran your next accrual on March 30, 2003, the program would check the Time-Off Plans that each employee is assigned to and accrue time for employees who are supposed to receive time between those dates. So, if your employees were supposed to receive vacation days on the anniversary of their hire dates, they would receive these days. The program runs accruals manually or automatically.

Setting Up a Time-Off Plan

Note: It's a good idea to have your company Time-Off policy (such as Vacation, Sick, & Personal time) with you when setting up your Time-Off Plans.

Here's an example of a Time-Off policy:
Say your company's vacation policy for full-time employees gives two weeks to those on staff for more than one year. (Employees under 12 months don't receive any vacation time on this policy.) The company gives three weeks to employees with over five years on the job and four weeks to all other employees over 10 years. Vacation time is given all at once on each employee's hire

date each year. Excess time left over at the end of the year is not allowed to carry over. (The company does not pro-rate time.)

Following along in the Time-Off Plan Maintenance screen, we'll break it down this way:
Accrue Plan Name: Full-time Vacation
Method: Time of Service
(Select the Benefit Year and How Often to Accrue) When and How often do they receive time: On their Hire Date, Yearly-Once per Year.
(Select what to do with prior year balance) Carry over excess time?: Zero Balance from prior year.
(Pro-rate earnings from partial months & partial years) Pro-rate? No
Time earned in: Days

Earning Levels:

Level	From Month	Up To Month	Days Per Year	Max Annual Earn	Max Annual Carry	Max Balance Allowed
1	0	12	1	0	0	0
2	12	60	10	0	0	0
3	60	120	15	0	0	0
4	120	9999	20	0	0	0

Explaining the Earning Levels
The **From** and **Up To** blocks must be entered in **Months**. The keywords **are UP TO**. Level 1 defined above shows From 0 months **Up To** 12 months, not through or beyond 12 months. Level 2 shows From 12 months **Up To** 60 months. Again it's only **Up To** the 60^{th} month, and not through or beyond.

The Days Per Year block allows you to enter how much time an employee will receive per year. An employee with 3 years will earn 10 days given on their anniversary date. (An employee with 3 years (or 36 months) will fall between row #2 above (12 – 60 months). When that employee reaches five years (or 60 months), they will automatically switch over to the next row (# 3) and earn 15 days per year.

Once you have set up your Time-Off Plans, follow these steps to complete setting up:
1. Assign the Time-Off Plans to your employees. (See Adding New Employees.)
2. Enter (Initial) balances for all employees from a specific start date. (Transaction Editor.) For example, if you wanted to start accruing from January 1, 2001, from within the Category Assignments screen you would enter the starting balance for each employee. This would be what each employee would have as of December 31, 2000 (one day BEFORE you want the program to take over). The program needs to have accurate starting balances for each employee.
3. When an accrual is run, the program will pick up where starting balances left off, and accrue according to how the Time-Off Plans are set up.

This table is provided as an aid to help you convert days/weeks per year to the monthly amount in hours. **NOTE**: This table assumes an 8-hour workday,
5-day workweek.

Weeks Per Year	Days Per Year	Hours Per Year	Hours Per Month
	1	8	0.6667
	2	16	1.3333
	3	24	2.0000
	4	32	2.6667

1	5	40	3.3333
	6	48	4.0000
	7	56	4.6667
	8	64	5.3333
	9	72	6.0000
2	10	80	6.6667
	11	88	7.3333
	12	98	8.0000
	13	104	8.6667
	14	112	9.3333
3	15	120	10.0000
	16	128	10.6667
	17	136	11.3333
	18	144	12.0000
	19	152	12.6667
4	20	160	13.3333
	21	168	14.0000
	22	176	14.6667
	23	184	15.3333
	24	192	16.0000
5	25	200	16.6667
	26	208	17.3333
	27	216	18.0000
	28	224	18.6667
	29	232	19.3333
6	30	240	20.0000

Accrual Formula for Hourly Rates:
(Number of hours per day *multiplied* by number of days total earned) *divided* by 12 months. This total is the amount that is earned per month rounded to 3 decimal places.
Example: (8 x 5)= 40 hours / 12 = 3. 333
Number of hours per day 8 multiplied by number of days earned 5= 40.
40 divided by 12 months = 3. 3333 (round to the fourth decimal place)

Incorrect Balances – Where are they coming from?

Balances may be incorrect for a number of reasons. The most likely reason is that the Time-Off Plans are not set up correctly.

Here are some things to know and to check if your balances are incorrect and aren't sure why:

- A good report to check is the Transaction Detail report. This will show each transaction of absences and time given. This will usually help identify where to start looking. If an employee has 80 hours of Vacation time within his second month of accruing, the Transaction will show how much was given and when.
- When an accrual is run, the program only accrues according to the Time-Off Plan. So, if the Time-Off Plan is set to accrue 40 hours on a monthly basis, the employees set up on that Time-Off Plan will receive 40 hours EACH month. Check the Time-Off Plan that the employees are on (especially the employees with incorrect balances).
- Are all the employee balances incorrect or just one or two? If all of the employee balances are incorrect, make sure the Time-Off Plans are correct, remove the accruals and then run the accrual again. If just one or two are incorrect, the easiest thing to do is just make offsetting adjustments in the Transactions.
- New Hires not receiving their time. Some companies allow their new hired employees to receive time (usually after 90 days) on Personal or Sick Time. But, their main policy for employees over 12 months receive their time on January 1st of each year. When a user sets up this type of policy, it's usually set up to accrue only on January 1st, and not after the 90 days. This requires the new hires to be set up on an accrual table and then switched over to the main policy. Instead of creating two Time-Off Plans in this case, we recommend giving the new hires their time manually for the first year, while keeping them assigned to the main Time-Off Plan. After their first year, they will begin to accrue normally.

Manually Entering Time

There are a couple of items to set up, even if you will be entering all of your time manually. Most users that enter their time manually still want the program to zero out the balances at the end of the year, or even on the anniversary date. All employees need to be set up on three (3) Time-Off Plans even if you carry over the balances each year.

Setting Up a Time-Off Plan to Zero Out Balances

In order to accomplish this, you will need to set up an accrual table to handle this. The following steps assume that you have already entered your employees, however, the accrual table can be set up at any time.

1. Click on **Settings** from the main menu, then click **Time-Off Plan Maintenance**.
2. Click New.
3. Enter an Time-Off Plan Name, such as Jan 1st, Zero Out.
4. The following selections should be made:
    1. Method – Time of Service
    2. Select the Benefit Year – Select On the 1st (Calendar), if you want to zero out on January 1st, or Hire Date if you zero out on the anniversary date.
6. Select How Often to Accrue – Select Yearly – Once per year.
7. Select what to do with prior year balance – Select Zero Balance from prior year.
8. Leave all other default settings and click Save.
9. Click on the Category Assignments Feature.
10. Click in the white box next to Vacation and select the name of the Time-Off Plan you set up in the above steps. **Note**: This step is only if you zero out your Vacation time. If you don't zero out this time then select the None plan for Vacation.
11. Follow Step 9 for the Sick and Personal categories.

Note: In order for the balances to zero out each year, you will need to run an accrual, on Jan 1st of each year, by going to File, Maintenance, and Perform Accrual, then clicking on Accrue Now. If you selected to zero out on the Hire Date you will need to run an accrual whenever you need to see the update balances.

Frequently Asked Questions

I don't want the program to run accruals for me. I want to enter my time manually for each of my employees. Is there anything I need to setup?
Most of our customers who want to enter their own earned time manually also want to zero out at the end of the year so that their balances start fresh. You can set up a Time-Off Plan that doesn't give time (so that you can enter your time in manually) and will zero out your balances each year on December 31. This way, your employee balances start fresh each year. Or, you can do a manual offsetting adjustment through the transaction editor to zero out your own balances each year.

Will my company policy fit into an Time-Off Plan?

Because each company's policy may be different, we can't guarantee that our Time-Off Plans will work with every policy, but they will work with the majority. You also may use Remove Transactions to enter time manually and not use the program to accrue for you if you choose. Or you may use Transaction Editor in conjunction with the accruals.

What should I do if my balances are incorrect?
One of the major causes of erroneous balances is flawed Time-Off Plans. To help identify why your balances are incorrect.

What is an accrual?
An accrual is simply an accumulation of time units. Gradience Attendance can accumulate earnings and deductions to an employee's balance of paid time off based on a Time-Off Plan

What is a Time-Off Plan?
A Time-Off Plan is a set of rules for the program to follow when accumulating or deducting time units from your employees' balances. This is based on your company policy for time off. For example, you can set up a Time-Off Plan that will give 40 hours vacation time on January 1 for employees with less than five years, 80 hours vacation time for employees with less than 10 years, and allow only a certain amount of carry over each year.

What if I want to turn off the accrual request that appears each day when I enter the program?
Click on Settings, Global Preferences, then select Attendance. Under Accrual Schedule, remove all the check marks from each day. Click SAVE to change the request, then Exit to close this menu.

What if I ran the accruals by accident, can I remove them?
Yes. Please see Removing Unwanted Transactions for details.

What if I do not want to run accruals?
Every employee must have an assigned Time-Off Plan for each absence category your company has. Remember that the absence categories are your buckets for your benefits (Vacation, Sick, Personal, PTO, etc.). On the Category Assignments screen, there cannot be any "blank" entries for Assigned Time-Off Plan. We provide the (None) benefit plan for this purpose. (See Manually Entering Time for setting up without using the program accrue feature.)

What are Transactions?
Transactions affect employee balances. They are like checkbook entries. The more deposits (earned time) you have, the higher your account balances. The more withdrawals (used time) you

have, the lower your balance. There are transaction entries for each Time-Off category and each earned amount.

How far back will Attendance calculate transactions?
Attendance accrues only from the last accrual date. The last accrual date in the program will either be Jan 1 of the current year or the date of the last accrual run. However, you can always remove accruals and re-run them for any date range. (See **Removing Accruals** to remove unwanted accruals.)

How many Time-Off Plans do I need to set up?
In determining how many benefit plans you should create, consider the following:

- Does your company provide more than one category of time off? Gradience Attendance allows unlimited categories for each employee. We have included three default plans labeled Vacation, Sick and Personal. You may add your own, such as PTO, Birthday, Comp Time, etc.
- Do you have separate Time-Off benefits for different employee categories? For example, categories can include union, non-union, part-time, full-time or senior management. In other words, do you give different Time-Off benefits, such as vacation time, to employees who worked for the same amount of time?

For the above scenarios, you would set up separate Time-Off Plans. (See **Time-Off Plans**.)

I entered a new employee, then ran an accrual and posted the time, but my new employee didn't earn time. Why?
Check the Time-Off Plan. If the Time-Off Plan is set up to run yearly on Jan. 1 and this employee was hired after that date, this employee will earn time only when the program accrues on January 1 of the following year. We recommend using the Transaction Editor and entering the earned time manually for new employees in this situation. SeeTransaction Editor.

Is there a limit to the number of Time-Off Plans?
No. There isn't a limit.

Is there a limit to the number of Absence Categories? (Such as Vacation, Sick, Personal, PTO, Birthday, Comp Time?)
No. There isn't any limit.

Reports

Gradience Attendance was designed with more than a dozen reports and charts that relate to employee absenteeism tracking. For additional reports, please try Gradience Confidential Employee Record, which offers you the power of additional employee information tracking.

List of Reports

Here is a list of the **Attendance** reports you can run:

Employee Detail
Employee Summary
Employee Balances
Employee Anniversary
Perfect Attendance
Absence Details
Absence Notes
Group Absences by Type

Hours Worked
Planner
Reminders
Transaction Detail
Year in Review
Adjustments
Charts
Table Listings

The report interface will allow you to select individual employees and gives you various options. The list above shows basic options and each report may have other options as well. See the individual report for specific details.

Printing from the Reports feature

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. Basic options are options that are available for all reports. Additional options are options that are available only for specific reports.

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.
- **Printer Setup** – Allows you to change the printer and printer settings.
- **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.

Export Options

- **Disable Headers on Export** – When saving a report from the preview screen, you are given the option to save in different formats, such as .txt, .csv and .xls. With this option checked, this saves the file without headers so that the data can be manipulated more easily without the headers throwing the rows and columns out of place.

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 VERSION 7 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.

Employee Detail Report

The Employee Detail Report shows pertinent employee information including Time-Off Plan assignments, balances, initial balances and notes from the Detail screen. Use this report when you need a quick overview of an employee's balances.

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 Balance Report

The Employee Balance Report shows Time-Off Plan names and employee balances. Use this report to quickly view which Time-Off Plans your employees are on and their balances.

Additional options for this report:

- **Select Totals** – This allows you to view totals by Hire to Date or Year to Date. Hire to Date shows grand totals since the employee was entered into the program. Year to Date shows current year totals based on the Benefit Year setup under the accrual tables. A benefit year can be set to Hire Date, On the 1st(Calendar), or Fiscal Year. This affects how the totals are viewed on the Year to Date option. For example, if the benefit year for the accrual table an employee is assigned to is set to Calendar (On the 1st), the current year totals would show from January 1st to December 31st (Calendar year). If the setting was on Hire Date, then the current year totals would show from anniversary date to anniversary date for the current benefit year.
- **Thru Date** – This allows you to select an ending date to view totals.

Employee Anniversary Report

The Employee Anniversary Report shows an employee's title, years of service, hire date and anniversary date.

Additional options for this report:

- **From & To Date** – This allows you to select a beginning and ending date to view employee anniversaries. For example: to view all anniversaries in 2001, you would enter From 01/01/01 To 12/31/01 and click on Preview. This will show you how many years of service and the date of an employee's anniversary, along with his or her name and title.

Perfect Attendance Report

The Perfect Attendance Report shows employees who do not have absences that count against perfect attendance. Use this report to quickly spot employees who have good attendance.

Additional options for this report:

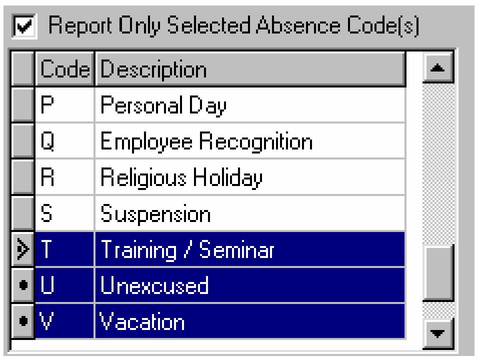
- **Attendance Date** – allows you to select a beginning and ending date to view employees who don't have absences that count against perfect attendance (see Count Against Perfect Attendance under Absence Code Maintenance).

Absence Detail Report

The Absence Detail Report shows employee absences. Use this report to quickly spot absence abuses or trends.

Additional options for this report:

- **Attendance Date** – allows you to select absence dates you want to view.
- **Report Only Selected Absence Code(s)** – When selected, this allows you to select multiple absences by holding down the Ctrl key and clicking on an absence. Holding down the Shift key and using the arrow keys on your keyboard allow you to select multiple absences consecutively. If unselected, it will report on all absences.



Note: When selecting multiple absence codes, make sure you have one of these symbols next to it: or . These designate selected absences to print. The second symbol (arrow with a dot) designates which row your cursor is on. A filled-in arrow designates only which row your cursor is on, not that the absence is selected.

Absence Notes Report

The Absence Notes Report shows notes for absences according to the Attendance Date range. Use this report when you want to view only absences for a particular date range.

Additional options for this report:

- Attendance Date – allows you to select dates to view with absence notes.

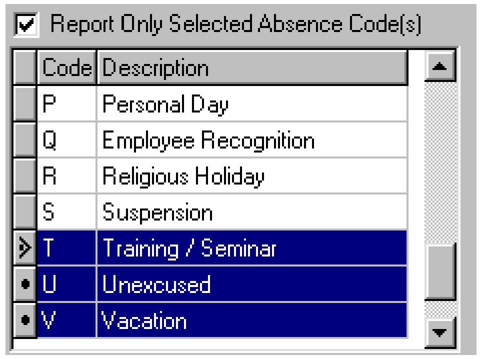
Note: If you want to view absences *and* notes together, see the Absence Detail report.

Group Absence By Type Report

Gives you a calendar format to view absences. This report is similar to the Absence Detail report except that this report does not show absence notes.

Additional options for this report:

- **Attendance Date** – allows you to select absences by a date range. Quick Dates allow you to select a date range at the click on a button.
- **Only Show Months With Activity** – allows you to view only months with absences.
- **Report Only Selected Absence Code(s)** – when selected, allows you to select multiple absences by holding down the Ctrl key and clicking on an absence. Holding down the Shift key and using the arrow keys on your keyboard allow you to select multiple absences consecutively. If unselected, it will report on all absences.



When selecting multiple absence codes, make sure you have one of these symbols next to it: or . These designate selected absences to print. The second symbol (arrow with a dot) designates which row your cursor is on. A filled-in arrow designates only which row your cursor is on, not that the absence is selected.

Worked Hours Report

The Worked Hours Report shows hours worked by a selected date range. The “W” Worked Time code must be placed on the calendar for each day worked for each employee being tracked. Be careful when unselecting the Use Date Range box as this will show all dates of time worked and may take a while to show the report.

Additional options for this report:

- **Use Date Range** – This allows you to select a date range.
- **Print Detail** – This allows you to view only summary of totals.
- **Sorting**– This allows you to sort by Date or Employee.
- **Group Hours Worked By** – This allows you to group by Week, Month, Year or None of these. As you select one of these options, the Date Range changes to reflect the selection.
- **Week Starts On** – This allows you to select a starting day. As you select one of these options, the Date Range changes to reflect the selection. Note: Week must be selected under Group Hours Worked By for this option to be activated.

Planner Report

The Planner Report allows you to view absences by hours in a calendar format. This report is similar to the Year in Review, except the Planner Report is mainly by absences.

Additional options for this report:

- **From Date and Through Date** – This allows you to select specific dates.
- **Date Range Used for Year to Date Totals** – Report Date Range allows you to view totals from a specific date range. This date range defaults to January to December of the current year. Date Range Assigned by Time-Off Plans allows you to view totals that reflect the Calendar screen.
- **Only Show Months With Activity** – This allows you to view only months with absences.
- **Absence Categories** – This allows you to choose which categories you want to view.

Transaction Detail Report

The Transaction Detail Report allows you to view all transactions since the employee was entered into the program or within a selected date range. Use this report to view transactions in a checkbook-style format.

Additional options for this report:

- **Report Settings** – allows you to select a date range for transactions, and whether to show "Holiday and Other". (See Not Assigned under Absence Code Maintenance.)

Year In Review Report

The Year In Review Report allows you to view selected absence categories in a calendar format. This report is similar to the Planner Report, except the Year In Review absence categories are mainly by dates.

Additional options for this report:

- **From Date and Through Date** – This allows you to select specific dates.
- **Date Range Used for Year to Date Totals: Report Date Range** – allows you to view totals from a specific date range. This date range defaults to January through December of the current year. Date Range Assigned by Time-Off Plans allows you to view totals that reflect the Calendar screen.
- **Only Show Months With Activity** – This allows you to view only months with absences.
- **Absence Categories** – This allows you to choose which categories you want to view.

Adjustments Report

The Adjustments Report shows manual adjustments and notes. A manual adjustment is entered through the Transaction Editor as an Adjustment.

Additional options for this report:

- **From Date and Through Date** – allows you to select a date range for to view adjustments.

Reminders Report

The Reminders Report shows reminders sorted by Date, Name, Topic or User Name.

Additional options for this report:

- **Sort Options** – This allows you to sort by Date, Name, Topic or User Name.
- **Filters**– This allows you to filter by User Name, All Users, Resolved, Unresolved and Global Only reminders.

Charts

Charts can help you identify absence trends in your company. Using the charts, you can track employee absences. Gradience Attendance has four charts to choose from:

- Absences Over Time – Enables you to view and compare employee absences over a one year period.

- Absences by Type – Enables you to view and compare employee absences by type of absence.
- Location Comparisons – Enables you to view and compare employee absences by location.
- Department Comparisons – Enables you to view and compare employee absences by department.

Chart Options

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

- Preview & Print – This shows a preview of the chart.
- Printer Setup – This allows you to change your printer settings.
- 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 data set.
- 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]).
- 3D Control – This allows you to view the depth of 3D by moving the arrows.
- Rotation– Rotates the chart in the desired direction.
- Explode Biggest – Moves the largest piece away from the pie.

Table Listings

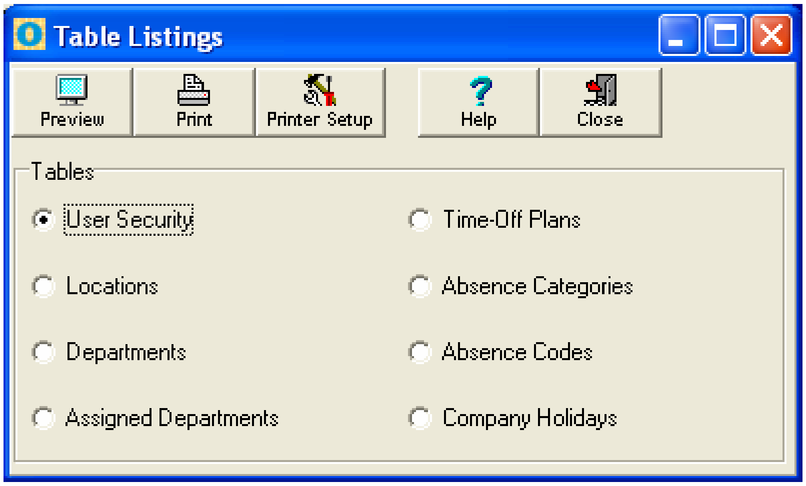
Table Listings enable you to view and print out the following settings:

- **User Security** – This prints user name with security settings.
- **Global Preferences** – This prints global preferences settings.
- **Locations**– This prints all locations.
- **Departments**– This prints all departments.
- **Assigned Departments** – This prints Locations with assigned departments.
- **Time-Off Plans** – This prints all Time-Off Plans.
- **Absence Categories** – This prints all absence categories.
- **Absence Codes** – This prints all absence codes.
- **Company Holidays** – This prints all holidays entered into the program.

Steps to print a Table Listings report:

1. From the **Reports** menu, select **Table Listings.**

You will then see the screen below.



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.

Backup and Restore

A **Backup** is essentially a “copy” of your employee records. Backing up ensures that you can recover from a computer failure or emergency. You may also install Gradience Attendance on another computer (even as a demo) and restore from your backup. For example, this is how you would transfer information from an old computer to a new computer.

Backup after you make changes to your employee records.
It is recommended that you backup your database after making any significant changes to the records. For example, any time you enter several employees, or input many changes to absence information would be a good indication of when to backup. You may also set up the DB Monitor to backup 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.

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 that when you restore data, your information will only be as current as the backup you are restoring from.

A Restore may only be done through the DB Monitor.

IMPORTANT NOTE

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

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 in which 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_08-02-2001_2300, or Monthly_Backup_09_01_2001_1700.
8. Click **Save**. The backup will be performed within a minute of the scheduled time. **Note:** The Server or Standalone Computer where the database is located 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.

Creating a manual backup

Backups can be done within the program by going to File, Maintenance, Backup or by using the DB Monitor. By default, whenever you close out of the program you will be asked if you want to perform a backup.

To use the DB Monitor, go to Start, Program Files, Gradience, Maintenance and select DB Monitor.

To create a manual 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 **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:** Version 7.1.x and above allow you to backup to a mapped drive. Version 7.0.x only allow you to backup to the same computer where the database resides.
6. Click **Close** when the backup is complete.

Restoring from a Backup

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

1. Go to the Server where the database files are located. (Restore cannot be done from a Client Installation.)
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 OK.

You may open the Gradience program to see your restored data.

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.

Settings – This allows you to change the Server Name and Database Path.
Backup – This allows you to set up a backup schedule or backup now.
Backup History – This shows all backups completed. You will need to manually delete old backups from within Windows Explorer.
Restore – This can only be done from the same drive where the database resides. For example, if the database was located on a Server, the restore could only be done FROM the Server, not from the Client Workstation.
Information – This allows you to view how many users are connected to the database and where the current database is located. 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. The Connections tab will also give you the version number that a user is using, which can identify computers that aren't using the same version.

Clearing Connections

Go to Start, Program Files, Gradience, Maintenance and select DB Monitor.

To clear a connection, follow these steps:

1. Make sure that 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 that all Computer Names have a "N" under Active Connections.
3. Click Clear Inactive Connections. This will clear all connections listed with an "N" under Active Connections.

Using Custom Reports

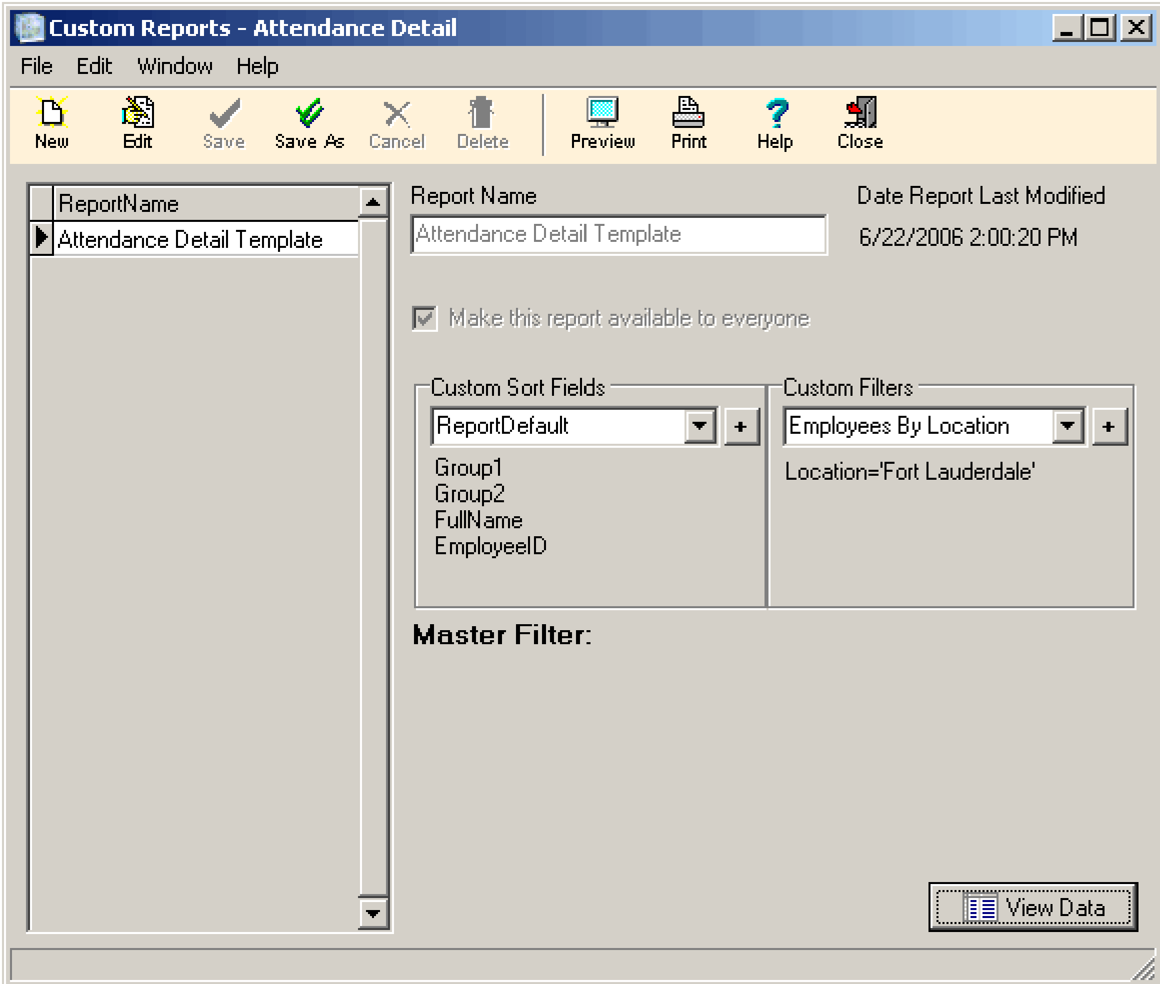
From any report feature (and after selecting filters and options such as Date ranges, Location and Department groupings, etc.) you can begin the process of creating a custom report. Custom Reports are a function of the **FastReport™** engine built into Gradience. The purpose of this tutorial is to take 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 is the “default” Gradience report (called a “template” inside the application) is used as a base for the new custom report. The user can always 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 would then 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 automatically assigned.

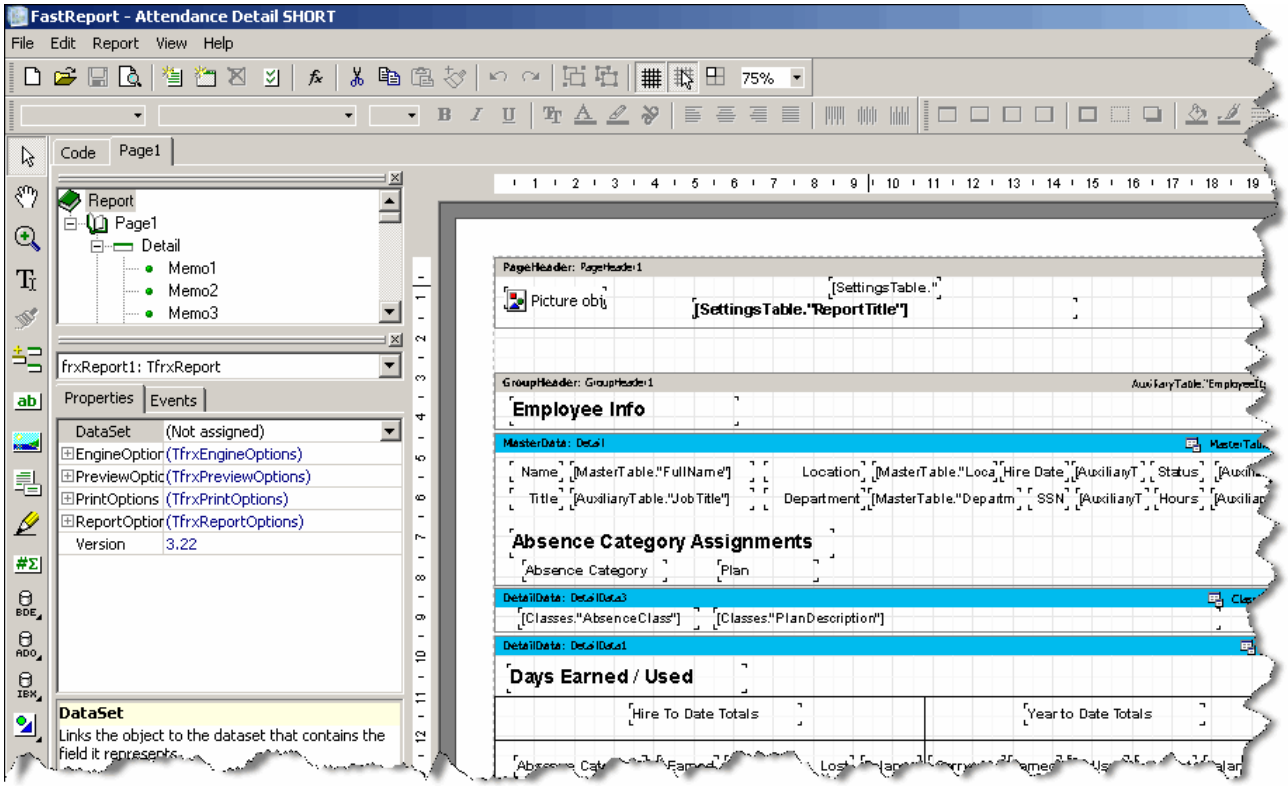
To create a custom report, follow these steps:

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 pane.
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 which 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 will probably want to change the default selection). Click Edit first, then click the (+) button to the right of the dropdown 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. Since you have already activated editing for items in this window, you can go ahead and click the (+) button to the right of the dropdown 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 will also 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.

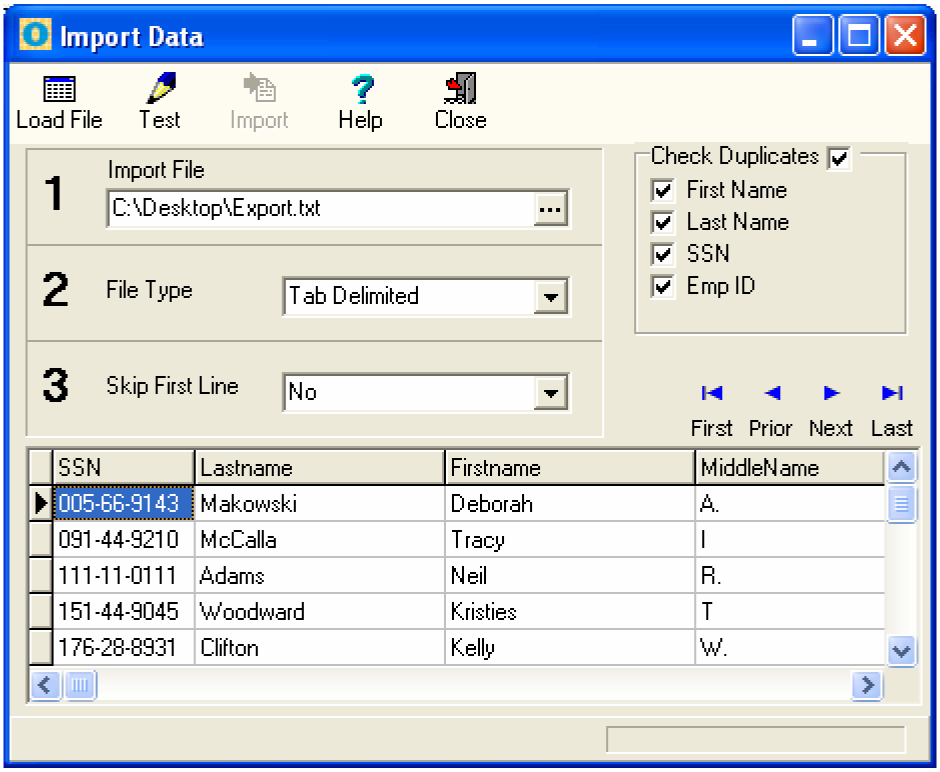


10. Once you are finished editing your custom report in the designer, click File > Save, Save As, or Exit to close the report to return to Gradience.

Import and Export

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

The software that you export your data from must be able to export the required information to a Tab delimited or fixed length text file. See Appendix D for 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.



Features

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.
Import File Type – This allows you to select the file type.

- Tab Delimited – We recommend exporting or importing as this type of file.
- Fixed Length – Gradience may export or import fields with a fixed length.

Skip First Line (Headers)- This will take out the first line, in case you have headers.
Import File – This allows you to enter the path or navigate to the file you will be importing.
Check Duplicates – This allows you to check for duplicates against the import file and the files already in the database.

Required Fields

The following are required fields for importing:

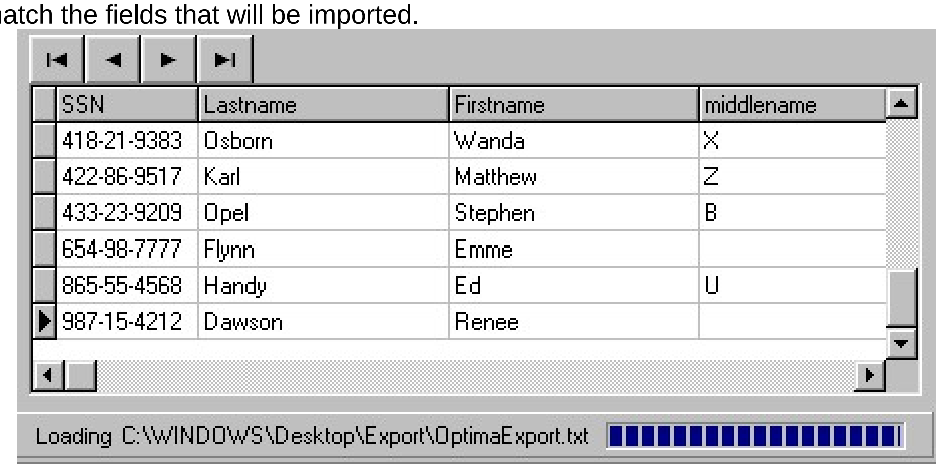
- Last Name
- First Name
- Location – name must be in the Gradience database prior to importing
- Department – name must be in the database prior to importing
- Date of Hire
- **Full/Part Time**
- **Active Status** (Active, Inactive, or Terminated)

Importing

To import your information, follow these steps:

From within the program click **File**, **Import**.

1. Enter the path of the file or click on the ... to navigate to it.
2. Select **Tab Delimited** or **Fixed Length**. This should correspond with the way the import file was saved.
3. Select **Skip First Line** if you have title headings. Do not select Yes if you don't have title headings or you may lose the first line of data.
4. Click **Load File** to preview the file. At this point you should check that all column headings match the fields that will be imported.



Note the column titles above: SSN, Lastname, Firstname, and Middlename; check each column to make sure the appropriate data is in the correct column. For example, the SSN number should have an 11-digit number plus two hyphens.

5. Select which fields to check for duplicates in the Check Duplicates box. Duplicates will be checked during the Test File phase.
6. Click **Test File**. This checks for blank required fields, and in the case of Location and Department, it checks to make sure that the name of the Location and Department has already been set up within the program.

CAUTION: If duplicates were detected and you click on Import, these fields will be imported into the program.

7. Once it passes the Test portion, you will be able to click on Import File.

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).

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.

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.

Sample Database

A sample company (called a tutorial database) is provided so that you may view the different screens with sample data already filled in. It is recommended that you use the program with the tutorial database in order 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 > Training > Gradience Attendance**.

The F1 Key

From most areas of the program**,** pressing **F1** will display the related topic.

Searching Help

You can search for Help two different 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 are listed in **Appendix B – Troubleshooting**.

For more information, please refer to one of the following:

Readme. txt file located in the program files\Gradience\ program directory.
Help File located in program files\Gradience\ or accessible from the Start Menu.
Internet Site www.gradiencesupport.com

Before Contacting Technical Support

Please follow these guidelines before contacting Technical Support:

- Remember Technical Support does not support setting up networks or computer configurations.
- If you are having problems with your computer, try rebooting first to see if that corrects the issue.
- If you are getting an error message, please write down the whole message or take a screenshot of it. Pressing the **PrintScrn** button on your keyboard will copy the screen to the clipboard; you may then open Word or Notepad and paste it to the document. From here you may print it out.
- If you are having problems with our program (getting error messages, program locking up, other strange things happening), please write down the steps to recreate the issue. This will speed things up when talking with a support representative.

- To get help in a timely manner, check the manual (Troubleshooting section), help files within the program, and our Website at www.gradiencesupport.com for known issues, and help on using the program.
- If you do call, please be near the computer and have the following:
  - **Gradience Account Number**
  - **Program Name**
  - **Program Version Number** (under **Help**, **About**)
  - **Full error message** and **steps to recreate, if possible.**

Contact Technical Support

Technical Support for Gradience Attendance is available as follows:

Internet: Please visit **www.gradiencesupport.com**
E Mail Requests: **techsupport@gradiencesupport.com** or fill out the online form
Phone Requests: 888-925-7740 (8:30 AM to 6:00 PM , EST, Monday through Friday)
Fax Requests: 954-851-1214

Troubleshooting

Here are the most common issues that you may experience when using Gradience. Please see the associated support documents on our website at www.gradiencesupport.com for the latest issues.

Unable to connect to Interbase Server
Getting **SQL Parse Error: EOF in String Detected** message when logging in
Conversion program not installed, unable to convert
Cannot 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

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 is likely due to the fact that the default Interbase User Account has been changed. Please provide a UserName and Password with Administrative Privileges to Interbase."

Description:

Users may encounter this issue for one of the following reasons:
If running from a Server:

- If you're using a Windows 2000 server and trying to install the database files to a drive other than C:\, permissions to the database folder may be incorrect.

If running from a Standalone Computer:

- Firebird Guardian may be shut down

If running from a Client Workstation:

- Incorrect Server Name and/or Database Path
- Client needs to have TCP/IP installed
- Server may be down

Possible Resolution:

- If running Gradience from a Server and encountering the above issue, try each of these solutions:

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 2000 Explorer and going to Properties by right-clicking the database folder.

- Check to make sure Firebird Guardian (or Firebird Manager) is running.

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 if 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.

1. If encountering the message when running from a Client Workstation, try this:

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.)

Once you have the Server information, go to the Client Workstation that 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)!

2. The Client needs to have TCP/IP installed.

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.

Run the Connections Diagnostic tool by navigating to **Start > Programs > Gradience > Maintenance > Connection Diagnostics**. This tool will check the common reasons why you're unable to connect and give you feedback on how to resolve these issues.

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

SQL Parse Error: EOF in String Detected

Issue:
Getting the above error message when logging in

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

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

Unable to Convert

Issue: Conversion program not installed, unable to convert

Description: This is usually caused when installing the Gradience program on a computer that does not have version 6 already installed and you need to convert your version 6 data.

Possible Resolution(s):
Install version 6 (either Gradience Attendance or Gradience Records 2007, it does not matter which program you use), then re-install the Gradience program. You may get version 6 either from the Gradience CD or from our Website at www.gradiencesupport.com.

Installing from the Gradience CD
Through Windows Explorer, click on the CD-ROM drive with the Gradience CD. Click on the folder BIN, Legacy, and Attendance 6.0 or Cerf 6.0, then double-click on the Setup.exe file. Accept all the defaults by clicking Next. Once installation is finished, open the Version 6 program to the main screen, then close out. Then install the Gradience version. In the Gradience installation process, it will ask if you want to install the Conversion Utility, click Yes and follow the prompts. When you open the Gradience program, it will ask if you want to convert your data, click **Yes.**

Unable to Install on a Win NT / 2000 / XP system

Issue:
The installation does not finish.

Description:
This usually happens if you do not have full Administrator rights on the Win NT / 2000 / XP computer.

Possible Resolution:

Make sure you have full Administrator rights before installing, then try running the installer again.

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 issue 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 will not experience the problem, but we still recommend downloading and installing the latest update.

Possible Resolution:
Download and install the latest Gradience Attendance update from our Updates area on our Website at: www.gradiencesupport.com.

Please follow the installation instructions. After downloading and installing the update, this should clear the connections automatically. If you're still receiving the error message follow the steps below to clear the connections.

1. Close Gradience Attendance 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-mouse click on the icon Gradience Database Monitor located in the system tray area, select Shutdown Database Monitor, and click OK to close DB Monitor.
7. Otherwise, click the Hide button.

Moving Database from One Location to Another

Issue:
Need to move your Gradience database from one computer (or drive) to another.

Description:
You may need to move the Gradience database because of receiving a new computer, new operating system, or running out of disk space among other reasons.

Possible Resolution:
The easiest way to move the database is to make a backup of your current database, install Gradience on the new computer, and restore the database. Follow the detailed instructions below:

1. From the current database backup your files from within the Gradience program by going to File > Maintenance > Backup Database or using the DB Monitor (go to Start > Programs > Gradience > Maintenance > DB Monitor > Backup Tab). Put this file in a location where you can get to it from the new computer. For example, onto a shared network drive or Zip Drive.

2. On the new computer, whether installing to a Standalone Computer or Client-Server environment, we recommend installing Gradience using Custom as the Setup Type and Server as the Install Type. This will put a blank database at that location. Restore the database (from Step 1) using the DB Monitor. When restoring, you can only restore from the computer where the database resides. You will not have the option in the DB Monitor to restore from a Client Workstation. Note: When going through as a Server Install, this will give you the Server Name and Database Path. Write this information down or print it out if you have client workstations that need to connect to the database.
3. To point the Client Workstation(s), if applicable, to the new location launch the Gradience program from the Client and enter the Server Name and Database Path (from Step 2) when it asks for it.

Please contact Technical Support if you're having problems installing or connecting to the database. **Note:** Technical Support cannot assist you with Network issues, such as setting up network access rights or checking your TCP/IP connection, but they may be able to give suggestions to common issues.

Installing Gradience Files to Another Drive Other than C:\

Issue:
You may wish to install 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 different sets of files that get installed: Program Files, Database Files and Database Engine Files (Firebird). When choosing Custom Install, you may select the location for the Program and Database Files that get installed at the same time. Firebird will automatically install to the c:\ drive after you click on the first Finish button. If this is okay, then you only need to follow Step 1 below and click on Finish. Otherwise, if you also want to install Firebird to another drive, then follow all of the below steps:

1. Run the installation of the selected Gradience program (such as Gradience Attendance, Gradience Records or Gradience 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 locate (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 (Firebird) and give you the ability to install these files to another drive other than C:\.

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 only install 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, then you will only have one file. If you have a Gradience CD then you will need to copy the appropriate Gradience program keeping all of it's folders intact. For example, while navigating the Gradience CD through Windows Explorer, simply copy the contents of the Gradience folder to **C:\Program Files\Gradience.** Remember that your database resides in **C:\Program Files\Gradience\Data** folder starting with Gradience Attendance 2007.

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 is already 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 up, click **Next** to install it, otherwise, go to Step **the next section**.
    8. Go to Client Workstation.

3. Final 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 & 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.

File Format

You may import and export only the fields on the Field Layout page. There are two different formats that you may use: Tab Delimited and 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. This is the easiest format.

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 required. 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.

The following is the field layout for importing text files into Gradience Attendance. Fields shown in **bold** type are required and all import text files must include them.

Social Security Number	11	123-45-6789
Lastname	20	up to 20 characters
First Name	20	up to 20 characters
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	1	Full-Time or Part-Time (only)
Title	30	up to 30 characters or numbers
Employee Code	14	up to 14 characters of 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
Address 2	30	up to 30 characters or numbers
Home Phone	30	800-123-4567 (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. – Ms. – Mrs. – Dr. (only)
Employee Security Level	16	up to 16 characters or numbers
Race	25	Must match a valid race on the 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
I9 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)

Using the Notes/Comments Editor and Attachments

Gradience Attendance 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 (formerly MyBiz) Forms which are personnel forms for vacation requests, FMLA requests and company responses, warnings and counseling reports.

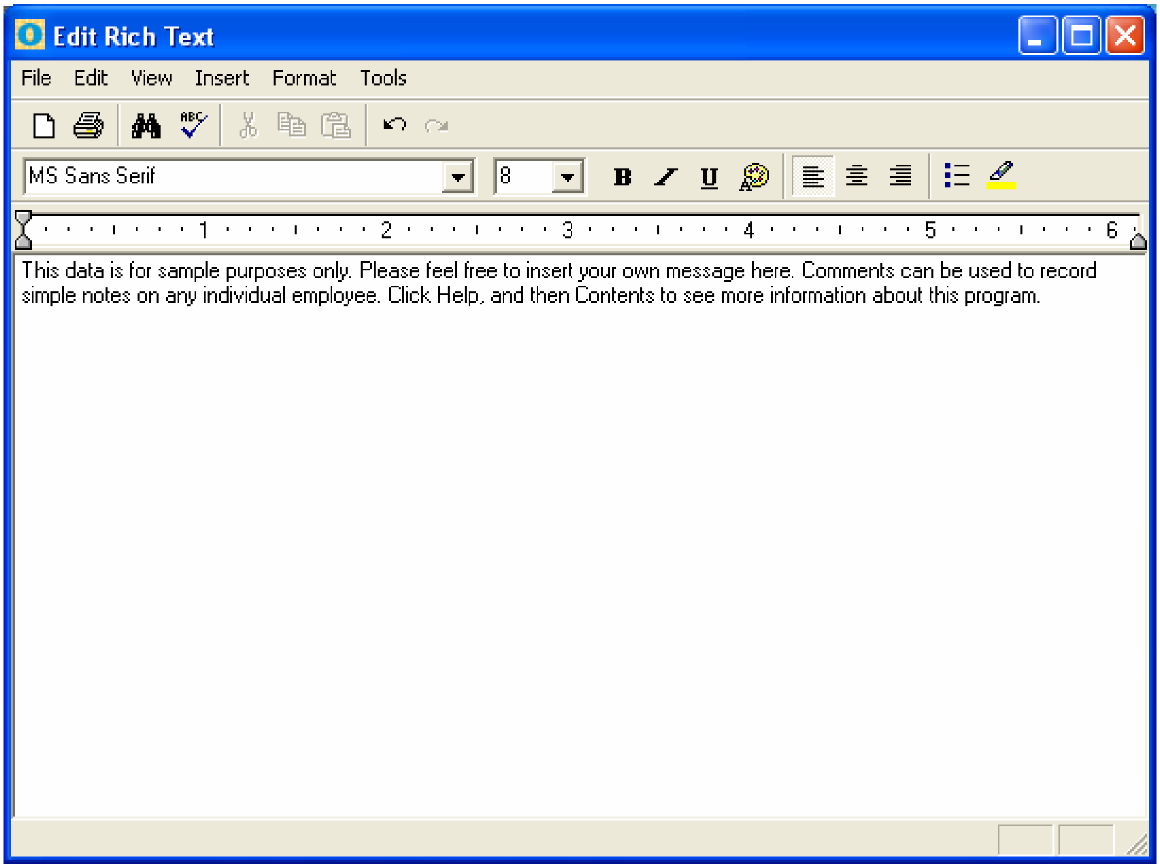
Right-Click Menu Commands

Right-click on any notes or comments field – the menu 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 spellchecker

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. The edit window is shown in the graphic below.



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.

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.

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 the file will be reflected in your document.

USB Fingerprint (BIO) Reader Setup Guide

Pre-setup Requirements
The following should be completed prior to setting up the USB Fingerprint Reader:

- MyBiz 2.3.x.x or Gradience 8.3.x.x and above
- Device Driver for the USB Fingerprint Reader installed
- USB Fingerprint Reader connected

Setting up User Access for use with the Fingerprint Reader

1. From main menu, go to **Settings**, then **User Security**.
2. Either select a user from the list or create a new user.
3. Under the Fingerprint heading, click on the **Add** button and follow the onscreen instructions.
4. Click the **Save** button when completed.

Logging into the program using the Fingerprint Reader

1. Close out and launch the program to get to the login screen.
2. At the login screen, you may log in by fingerprint any time the "Fingerprint Scanner Ready…" message is displaying. The Fingerprint Scanner will become inactive after 90 seconds.

Maintenance

Using a non-scratch cloth clean the lens of the Fingerprint Reader as needed.

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