gradience®

Download a trial version of any software title for version 11 Gradience Pro/Enterprise …called a "demo".
Note: you will enjoy 100% functionality for 30 days for FREE.

Summary:
Download and Install any Gradience Pro/Enterprise Software Titles

Problem / Goal:
Download and Install any Gradience Pro/Enterprise Software Titles

Solution:
This is a three-part process. (*Download*, *Installation* & *Launch*) Please print these instructions before clicking the link below.
CAUTION! You <u>cannot</u> run a demo of the current version on the same computer where you are already running Optima or MyBiz or Gradience versions 9 or 10. You must run it on a separate computer. The new software cannot share data with your old software. If you purchase it, and want to bring over all of your existing data, you will have to "upgrade" whatever software titles you have of Optima, MyBiz or Gradience 9 or 10 to the current version. All of your existing data will come over.

DOWNLOAD: Use the link below. When the web page opens, click the title of the software you wish to download.
Version 11 Gradience Pro/Enterprise Download Link: http://updates.gradiencesupport.com/download.aspx?product_id=18

- **If** see a <u>slender</u> popup window on your screen with three options (**Run**, **Save**, **Cancel**). Please don't click **Run**. Instead, click the down arrow next to **Save** and select **Save As**. When your MyComputer screen opens, select **Desktop** and click **Save**. This will start the download process. When it is finished, do not click **Run**. Click **Close**. To "install" it, please follow the installation steps below.

- **If** you get a large, popup with **Run**, **Save**, **Cancel**. There will be no down arrow next to **Save** so just click **Save**. You will then get the standard Save As popup window. Click the **Desktop** button on the left edge of the popup and then click **Save** in the lower, right corner. This will begin to download the installation file to your desktop. When it is finished, do not click **Run**. Click **Close**. To "install" it, please follow the installation steps below.

INSTALLATION:
The installation file on your desktop will look like one of these. →

- **Gradience TimeClock** is the administrative shortcut.
- **Gradience TimeStation** is for clocking in and out.

If you don't see the extension .exe it is due to a setting on your computer. You may use the shortcut anyway.

Installing the demo (trial version) on just one Computer:
Double-click the installation file. When the options **Server**, **Client**, and **Standalone** appear, select **Standalone**. When the options **Custom** or **Express** appear, select **Express**. Click **Next** through to the end. Disregard **Test Connection**. It will fail. Click **Finish**. Wait a few moments for Firebird to install.

Installing the demo (trial version) on the Server:
Install the demo there first. When the options **Server**, **Client** or **Standalone** appear, select **Server**. When the options **Custom** and **Express** appear, select **Express**. Click **Next** until done. <u>Please</u> jot down or print-out the name of the server and the path to the database. <u>You will need this at the client</u>. The **Test Connection** will fail. Continue to the end, click **Finish**. Wait for Firebird to install.

Installing the demo (trial version) on a Client Workstation:
Put the installation file on the desktop. When given the choice of **Server**, **Client** or **Standalone**, select **Client**. When given the choice between **Custom** and **Express**, select **Express**. Use the information you printed out or jotted down at the server to properly "point" the client. <u>Do not</u> map a drive and <u>do not</u> use UNC (\\). If you do either of these things, the client will not find the data.

LAUNCH:
Use the desktop shortcut that looks like one of these. →
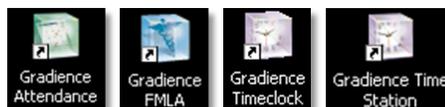
Please see the next few pages for Frequently Asked Questions and instructions.

Frequently Asked Questions…

How long can I run the demo?
You may use it for 30 days. If after 30 days you need more time to evaluate the demo, enter the words **demo extend** when it prompts you for the product key. This will give you another 30 days to run it in demo mode. You can only do this once so use the first 30 days before entering **demo extend**.

Will all of the data I enter into the demo be available when I purchase it?
Yes, you may enter your own data into a fresh, blank database or use the sample database provided. If you use the new, blank database to enter your own data, all of the data you enter will still be available after you purchase it.

Can I get training?
Regrettably, we don't. You may use the **Quick Setup Guide** below or for more comprehensive software instructions that are FREE, go to www.gradiencesupport.com. Scroll to **Knowledgebase** to do a key word search using the word **Train**.

Gradience Attendance Quick Set Up Guide

IMPORTANT!
No data entered into the sample database (during the demo phase) will be available after purchase.
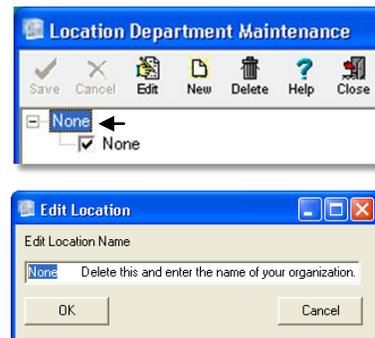
Set a Begin Date. This will tell Gradience Attendance when to begin managing your organization's Time-Off. If your Begin Date is several months back, you will need to inform the program of any Time-Off that has been used between then and now. To avoid a lot of data entry, you might consider making your Begin Date something very recent.
1.   Click **File** > **Maintenance** > **Remove Transactions** and enter a **Begin Date** for when you want to start.
2.   Enter "today's date" into the **End Date** field; click **Run Process** and **Close**.

Set up your Locations and Departments before entering any employee names. *[Not necessary already done in another title]*
1.   Click **Settings** > **Locations/Departments**. Notice a location designated **None** and a department designated **None**. Click on the first **None** and click **Edit**. Replace **None** with the name of your organization or main office and then click **Save**.
2.   Click the second **None** and then click Edit, Replace **None** with the name of a department within your organization or main office and then click **Save**.
3.   To enter another department, click **New** and select **New Department**. Enter the name of the additional department and click **Save**.
4.   To enter another location, click **New** and select **New Location**. Enter the name of the additional location and click **Save**. All of the departments that you have already created will become potential departments for the new location. Check the ones that apply to the new location.
5.   On the **Employee Detail** screen and, in the upper right, click the **X** just under the Gradience logo for these to be available.

IMPORTANT! Temporarily keep your Time-Off accruals from running automatically until you are ready for them to run automatically. Click **Settings** > **Global Preferences** > **Attendance**. Under **Accrual Schedule**, set it to **No Action** and click **Save** > **OK** > **Close**.
Set up your Absence Categories for the Time-Off you need to track. The defaults are Vacation, Sick & Personal. You may rename, create, or delete absence categories and even change the sort order of your absence categories.

Set up your Time-Off Plans. Automatically accrue as much or as little Time-Off as you want, whenever you want. Click **Settings**, **Time-Off Plan Maintenance** > **Detail**. Make entries based on your policies; then click **Save** > **Plan Description**.
Enter just a few employees at first. Click **Employee Detail** > **New** and enter data. The required fields are: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, and **Department**.

Please see the next few pages for more instructions.

Note: We recommend that you only enter just a few employees into the program at first because, to test your accruals, <u>each</u> employee entered <u>must have a Time-Off plan</u> assigned to him/her <u>for each Time-Off category</u>, so testing with only a few names is best. If someone shouldn't get some type of Time-Off, assign him/her a plan called **'None'** for <u>that Time-Off category</u>.

Run a test. Be sure <u>your</u> settings are correct. Test the way you've set things up.

1. Click **File** > **Maintenance** > **Perform Accruals**.
2. When the accruals are complete, click **Post Accruals** > **Close**. Clicking **Preview** is not necessary.

Remove the test accruals and enter the rest of your employees.

1. Click **File** > **Maintenance** > **Remove Transactions** and re-enter your **Begin Date** as you did earlier.
2. Enter "today's date" into the **End Date** field; click **Run Process** and **Close**. This will remove the test accruals.
3. Enter the remaining employees and assign them their Time-Off plans. You then can set the program to accrue <u>automatically</u>.

Set Time-Off to accrue _automatically_ going forward.

Click **Settings** > **Global Preferences** > **Attendance**. Under **Accrual Schedule**, set it to **Run** and click **Save** > **OK** > **Close**.

Gradience Records Quick Set Up Guide *…In December of 2012, this title was added to Attendance.*

Set up your Locations and Departments before entering any employee names. *[Not necessary already done in another title]*

6. Click **Settings** > **Locations/Departments**. Notice a location designated **None** and a department designated **None**. Click on the first **None** and click **Edit**. Replace **None** with the name of your organization or main office and then click **Save**.

7. Click the second **None** and then click Edit, Replace **None** with the name of a department within your organization or main office and then click **Save**.

8. To enter another department, click **New** and select **New Department**. Enter the name of the additional department and click **Save**.

9. To enter another location, click **New** and select **New Location**. Enter the name of the additional location and click **Save**. All of the departments that you have already created will become potential departments for the new location. Check the ones that apply to the new location.

10. On the **Employee Detail** screen and, in the upper right, click the **X** just <u>under</u> the Gradience logo for these to be available.
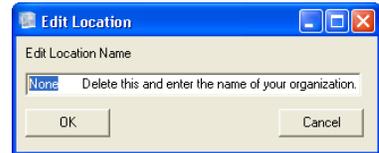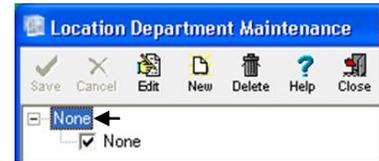
Set up your menus. Prepopulate menus with your own custom choices.

Click **Settings** > **General Codes** and select each item listed on the left one at a time. On the right, click **New**. Check **Enabled**, enter the new choice, click **Save** and **Close**. Repeat as needed for each menu listed on the left.

Enter just a few Employees at first. If you will be using this program along with Gradience Attendance, we recommend you only enter a <u>few</u> employees into the program at first. This is because, to test your accruals in Gradience Attendance, <u>each</u> employee entered <u>must have a Time-Off plan</u> assigned to him/her <u>for each Time-Off category</u>, so testing with just a few names is best. The employees entered should represent a cross-section of the organization.

Click **Employee Detail** > **New** and enter data. The <u>required</u> fields are: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, and **Department**

Set up Personal Contacts: When entering a personal contact of an employee, you may designate the new contact as an Emergency Contact. You also may select the "order" in which they should be contacted in the event of an emergency. Later, when you assign a benefit to an employee, the names entered here will appear as potential beneficiaries.

Click **Personal Contacts** > **New** and enter required data. To add a photo, click **Edit Picture** and navigate to the photo.

Please see the next few pages for more instructions.

Create Benefits by clicking **Settings** > **Benefit Plan Maintenance**. The **Benefit Plans** screen will open.

1. Click **New**. The **Edit Benefit Plans** screen will open. Under **Type**, make a selection and then enter data as needed.
2. Click **New Tier**; double-click in the tier name field and enter the tier name such as **Tier One**, **Individual**, **Primary**, etc.
3. Under **Type**, select the appropriate choice, and under **Rate** enter the total monthly cost (employer - employee cost combined).
4. If you wish to show the employer and employee rates as a percentage, the numbers entered must total 100.
5. Under **Employer Rate** and **Employee Rate**, enter the percentage or dollar amount that is appropriate.

Assign Benefits to Employees.

1. Select an employee and click **New**. On the **Benefit Detail** screen, enter data as appropriate.
2. Skip the **Termination of Benefits** area, and skip the **Coverage End Date** when first assigning the benefit.
3. In the **Comments** area, you may enter any comments you wish or paste files you may have copied and click **Save**.
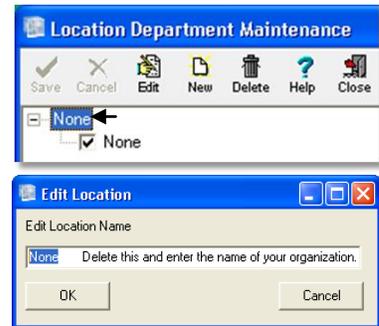
Gradience FMLA Tracker Quick Set Up Guide
Set up your Global Preferences

1. Click **Settings** > **Global Preferences** > **FMLA**.
2. Enter your **FMLA Contact** name and **FMLA Contact Information** phone/e-mail.
3. Enter the **FMLA Poster Location(s)** – up to 80 characters and enter your FMLA defaults.

Set up your Locations and Departments before entering any employee names. *[Not necessary already done in another title]*

1. Click **Settings** > **Locations/Departments**. Notice a location designated **None** and a department designated **None**. Click on the first **None** and click **Edit**. Replace **None** with the name of your organization or main office and then click **Save**.
2. Click the second **None** and then click Edit, Replace **None** with the name of a department within your organization or main office and then click **Save**.
3. To enter another department, click **New** and select **New Department**. Enter the name of the additional department and click **Save**.
4. To enter another location, click **New** and select **New Location**. Enter the name of the additional location and click **Save**. All of the departments that you have already created will become potential departments for the new location. Check the ones that apply to the new location.
5. On the **Employee Detail** screen and, in the upper right, click the **X** just under the Gradience logo for these to be available.

Enter just a few Employees at first. If you will be using this program along with Gradience Attendance, we recommend you only enter a few employees into the program at first. This is because, to test your accruals in Gradience Attendance, each employee entered must have a Time-Off plan assigned to him/her for each Time-Off category, so testing with just a few names is best. The employees entered should represent a cross-section of the organization.

Click **Employee Detail** > **New** and enter data. The required fields are: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, and **Department**

Using Gradience FMLA Tracker: The following is just an overview. Use Tip Sheets for more clarification.

1. When an employee requests FMLA, click **Forms** > **Employee Leave Request**. Print the form for the employee to fill out.
2. When the form is returned, select his/her name and click **Leave Request Details** > **New**. Make your entries and click **Next**.
3. On the **Eligibility Check** screen, use the **Smart Tip** to check what applies. Click **Eligibility**. If he/she is eligible, click **Next**.
4. Use appropriate **Smart Tip** to fill out the **Company Response (Eligibility)** screen. Click **Preview** and print the form as a PDF. **Note:** You must provide the employee a **Company Response (Eligibility)** within 5 days of your becoming aware of the need for FMLA leave, which may not necessarily be 5 days after receiving a **Leave Request Form**. If you request certification, you must allow the employee up to 15 days to produce it.
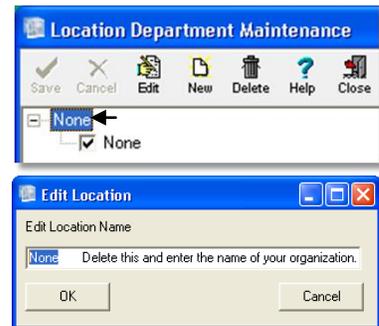
Please see the next page for more instructions.

5. Use a **Smart Tip** to fill out the **Company Response** (**Designation)** screen. Click **Preview** and print the form as a PDF.
   Note: You have up to 5 days after receiving proper certification to provide the employee a **Company Response** (**Designation)**. If a certification or additional information is not required, you must provide the **Company Response** (**Designation)** together with the **Company Response (Eligibility)**.
6. If you wish to maintain a record of pertinent dates, click **Document Dates**; make your entries and click **Save**.
7. If you wish to view any forms you already have printed, click **Print History**. You may print again, if you wish.

Gradience TimeClock Quick Set Up

Set up your Locations and Departments before entering any employee names. *[Not necessary already done in another title]*

1. Click **Settings** > **Locations/Departments**. Notice a location designated **None** and a department designated **None**. Click on the first **None** and click **Edit**. Replace **None** with the name of your organization or main office and then click **Save**.

2. Click the second **None** and then click Edit, Replace **None** with the name of a department within your organization or main office and then click **Save**.

3. To enter another department, click **New** and select **New Department**. Enter the name of the additional department and click **Save**.

4. To enter another location, click **New** and select **New Location**. Enter the name of the additional location and click **Save**. All of the departments that you have already created will become potential departments for the new location. Check the ones that apply to the new location.

5. On the **Employee Detail** screen and, in the upper right, click the **X** just under the Gradience logo for these to be available.

Enter just a few Employees at first. If you will be using this program along with Gradience Attendance, we recommend you only enter a few employees into the program at first. This is because, to test your accruals in Gradience Attendance, each employee entered must have a Time-Off plan assigned to him/her for each Time-Off category, so testing with just a few names is best. The employees entered should represent a cross-section of the organization.

Click **Employee Detail** > **New** and enter data. The required fields are: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, and **Department**.

Set up your Work Schedules: Click **Settings** > **Work Schedules**. Develop one or several work schedules for your hourly employees. Work Schedules do not need to be created for or assigned to salaried employees.

Enable Access: Give administrators access to the admin portion and give employees access to clock in and out.

1. Click **TimeClock Access**; select an employee under **Employee Select**. Enter a **Login**, **Password**, and **Verify Password**.
2. On the bottom half of the screen, under the **TimeClock Access** bar, make selections appropriate for this employee, including the **Current Work Schedule** and **In Out Board Access**.

Recommendation: Give all hourly employees access to **My TimeClock** so they can use the TimeStation to check their own hours worked over time rather than asking HR to check for them. Also, give the receptionist **In Out Board Access**.

Run a test. Clock in and out and run an **Hours Worked Report**. If you are using this program along with Gradience Attendance and are sharing codes, enter the shared code **V** for **Vacation** on the calendar in Gradience Attendance to see whether it is recognized by TimeClock. If it isn't, click **Settings** > **Global Preferences** > **TimeClock**. Check **Enable Code Sharing** > **Save** > **OK** > **Close**. Try again by entering a code on the calendar in Gradience Attendance and see whether TimeClock recognizes it.

Document URL:
Document for: ☐ Internal
                     ☒ Public