

Gradiance FMLA Tracker Instructions

Summary:

Learn how to set up and use Gradiance FMLA Tracker Pro/Enterprise

Problem / Goal:

Learn how to set up and use Gradiance FMLA Tracker Pro/Enterprise

Solution:

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Quick Setup

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.

1. Click **Settings > Locations/Departments > New**, select **New Location**, enter the name of a location and click **Save**.
2. Click **New**, select **New Department** and enter the name of a department and click **Save**.
3. Put checks in the boxes next to the departments belonging to each location.
4. Go to 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.
5. Use appropriate **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.

FREE Software Instructions are available to help you learn how to use it more fully.

Tech Support does not provide direct assistance with learning how to set up or use the software. You can click on Help > Contents to access a library of "How-To" information. Free instructional documents are also available upon request.

To request FREE 'How-To' instructions go to www.gradiencesupport.com and click on **Create Account** to create a **FREE** Gradience online support account. This account will allow you to create your own Gradience Help Desk Tickets. These are then sent directly to Gradience Tech Support. Indicate the area(s) you need help with and please provide your e-mail address. Tech Support will e-mail you easy-to-follow instructions on the tasks you need to do in the software.

Global Preferences/Settings

Set up Global and FMLA Preferences

1. Click **Settings > Global Preferences > Company Info.**
 - Enter company name and address.
 - Enter Company Logo, Click **Assign New Logo** and navigate to and select the file containing the logo. It must be no greater than 200 x 200 pixels.
2. Click **General Settings.**
 - **Allow use of Forgotten Password utility**
Be sure this is checked. If you forget your password, contact Gradience Tech Support.

If this is unchecked, do the following:
Go to www.gradiencesupport.com. In the **Ask a Question** section, click on [submit your question](#). This will enable you to send the backup to Tech Support.
 - **Forced Writes for InterBase**
Normally when data are entered, the data reside in memory momentarily (perhaps as long as several minutes) before being sent to the database. Should your computer crash during that time, the data may be lost before reaching the database. When checked, this feature enables data to be sent to the database more rapidly.
 - **Prompt for Backup on exit**
When checked, this simply enables a prompt for backup to appear upon closing the program. We recommend you back up your data daily; so having this checked is ideal.
 - **Default Hours in a day**
Full time – indicates the default number of hours in the typical workday for full-time employees.
Part time – indicates the default number of hours in the typical workday for part-time employees.
3. Click **Report Options** and check the appropriate items.
 - **Print Preview** - When checked, allows you to preview before printing.
 - **Header Bold** - When checked, allows header titles to be bold.
 - **Header Line** - When checked, puts a line under header titles.
 - **Header Shade** - When checked, shades the location or department row.
 - **Data Line** - When checked, allows lines to separate data information.
 - **Print SSN** - When checked, allows social security numbers to appear on reports.
 - **Print Picture** - When checked, allows photos to print on reports.
 - **Print Totals** - When checked, allows totals to display on reports.
4. Click **FMLA.**
 - Click **Settings > Global Preferences > FMLA.**
 - Enter your **FMLA Contact** name and **FMLA Contact Information** phone/e-mail.
 - Enter the **FMLA Poster Location(s)** – up to 80 characters and enter your FMLA defaults.
5. Click **Fingerprint Reader.**
Check **Enable Fingerprint Reader** if you plan to use it as a means of opening the software. You will need to have installed the fingerprint reader and followed the setup instructions that come with it. Adjust the settings as needed.

Change Administrator Password

1. From any screen, click **Settings > User Security** and highlight the current **User Login**.
2. On the right, the current password will be displayed as a series of asterisks (****).
3. Enter your new password and repeat the new password under **Verify Password** and click **Save > Close**.

Locations & Departments

1. Click **Settings > Locations/Departments > New**, select **New Location**, enter the name of a location and click **Save**.
2. Click **New > New Department**. Enter the name of a department and click **Save**.
3. Put checks in the boxes next to the departments belonging to each location.
4. Return to the **Employee Detail** screen. In the upper-right; click the **X** just under the Gradience logo for these to be available.

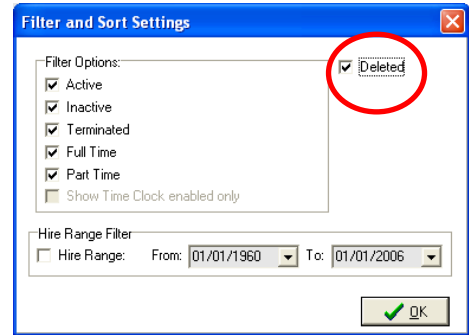
Tip: From the Employee Detail screen you can click **Add Location** or **Add Department** to enter new Locations and Departments.

Employees – Enter

1. Click **Employee Detail > New** and enter information into the fields provided. The **required** fields are... **First Name, Last Name, Hire Date, Work Status, Employment Status, Location, Department**
2. To enter an **employee photo**, click **Edit Picture** and when the pop-up opens click on **Assign New Photo**. Navigate to the photo file that you need, double-click on it to select enter it. It must be no larger than 200 X 200 pixels.

Employees - Hide or Display

1. Click **View > Filter Page**. The **Filter and Sort Settings** window will open.
2. Uncheck the type(s) of employees you want to hide, and check the type(s) of employees you wish to display.
3. At first, you will not see the checkbox in the upper right for **Deleted** employees.
4. While holding down your **Ctrl** key and your **Alt** key, press your **X** key and then release them all together.
5. You will see a new checkbox appear in the upper right for **Deleted** employees.
6. Uncheck this new checkbox if want to hide **Deleted** employees, and check it if you wish to display Deleted employees.
7. If you check **Hire Range**, the program will display only the type(s) of employees checked who were hired between the dates entered. Typically therefore, you would not check **Hire Range**.
8. Click **OK** to save these settings.



Security – Set permissions for users.

- **Option One: Setup rights from scratch.**
- **Option Two: Duplicate [or nearly duplicate] the rights of another user.** See **Note** at the bottom of option two.

Option One: Setup rights from scratch.

Click **Settings > User Security > New**. Enter a **log In, Full Name, Password**, repeat in the **Verify Password** field. By default, the **Detail** button at the top will be depressed. Features associated **Detail** will appear at the lower right.

1. As you click each item in the Access Rights column one at a time, the item will highlight and a down arrow will appear.
2. Click on the down arrow and a drop-down menu will appear.
3. Select the appropriate level of access. Repeat this for each feature listed.

Note: You will have an additional button on the top-right of your screen for each Gradience program installed:

- **Gradience Attendance**
- **Gradience Records**
- **Gradience TimeClock**
- **FMLA Tracker**



Click each of these buttons respectively and repeat steps **1, 2 & 3** directly above and click the **Location/Department** button and ensure that the appropriate Locations and Departments are checked. When you are done, click **Save**.

Option Two: Duplicate [or nearly duplicate] the rights of another user. See **Note** after step 3.

1. Click **Settings > User Security** and highlight the user who's rights are to be duplicated or nearly duplicated.
2. Click the double-green checkmarks (**Save as**) button at the top. A pop-up window will open.
3. Enter the new login, enter the name of the new user, enter the new password and enter the password again and click **Save**.

Note: To nearly duplicate another user's rights, follow Option Two but before saving, restrict access rights to particular features as needed and click **Save**.

IMPORTANT! We recommend that only the administrator should have the ability to set the user rights for other users. Therefore, it is important when setting up the rights for another user that you deny access to **User Security**.

Feature	Access Rights
Process Taylor CSV	No
Employee Record Access	Read Write Delete
Detail	Read Write
View SSN	Yes
Run Reports	Yes
Reminders	Read Write Delete
Reminders, Assign Global	Yes
Reminders, Assign Users	Yes
User Security	No Access
Location/Department Maint	Read Write Delete

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**. After making entries, click **Next**.
3. On the **Eligibility Check** screen, use a **Smart Tip** to check what applies. Click **Eligibility**. If he/she is eligible, click **Next**.
4. Use a **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.
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)**.
 - If you wish to maintain a record of pertinent dates, click **Document Dates**; make your entries and click **Save**.
 - If you wish to view any forms you already have printed, click **Print History**. You may print again, if you wish.

Entering Employee Leave Requests

Purpose of the Form:

The Employee Leave Request form is used to provide a way of gathering information necessary to determine whether an employee's requested leave is covered by the FMLA without violating the FMLA and other privacy laws. It also provides a way to ensure that FMLA requests are always well-documented.

Minimum Requirements:

This form should be given to an employee as soon as he or she requests leave that may be FMLA-qualifying. Though not required by law, it is a good idea to have your employees complete an Employee Leave Request form to make sure you are able to gather the information necessary to determine whether the leave is covered under FMLA, to give your employees required FMLA-related information as soon as the request is made, and to make sure a clear written record is created documenting the request.

Important!

Please review **Form Do's and Don'ts** and other important information below.

1. First be sure your basic FMLA defaults have been set up in Global Preferences. Click **Settings > Global Preferences > FMLA** and make all of the entries for your organization.
2. When finished, click **Save > OK > Close**, close out of the program altogether and reopen it for the changes to take effect.

Reminders

You may setup a **One Time Reminder** or a **Recurring Reminder**.

One Time Reminder:

1. Click **Reminders** and select the appropriate employee or employees. When the window opens, click **New**.
2. Enter a reminder **Title**, and **Date**. Check **Assign to all selected (checked) employees**.
3. Select the **User** (the one to be reminded), enter any details pertaining to the reminder under **Description** and click **Save**.

Recurring Reminder:

1. Click **Reminders** and select the appropriate employee or employees. When the window opens, click **New**.
2. Check **Recurring Reminder**, In the **Type** field select the reason from the drop-down menu and enter the **Through Date**.
3. In the **Remind** field, use the up or down arrows to enter the number of days ahead of the event that you wish to be reminded.
4. Select the **User** (the one to be reminded), enter any details pertaining to the reminder under **Description** and click **Save**.

Note: Once you have created a reminder it will appear when you first open the program on the reminder date. You may close a reminder without resolving it. It will continue to appear until you click **Resolve**.

Attaching Files/Photos

Begin by right-clicking on a file and then, left-click under **Notes** and **Comments**. Next, right-click and chose **Paste** to place files such as a Word document, an Excel file, a PowerPoint file, a PDF, a j-peg or bit map into the field.

Reports - Saving

Open a report, click on the **red Adobe logo**, click **OK** and **Save**. You may also select from a variety of other file formats when saving reports. (.rtf) will allow the person opening the report to alter the information and layout.

Backups – Back up your data manually.

You should regularly back up your data. You may do this manually or automatically.

Manual Database Back Up: (Two Options)

- When closing the program elect to back up the database.
- From within the program click **File > Maintenance > Backup Database**.

Backups - Back up your data automatically.

1. From the desktop click **Start > Programs > Gradience > Maintenance > DB Monitor**. Login just as you login to the program.
2. Click on **Backup**. And then click on **New Backup** and make appropriate selections in the Backup Schedule window.

Backups - Restore data that was previously backed up.

1. Click the Windows **Start** button > **All Programs > Gradience > DB Monitor**. Enter your Gradience login and password.
2. Click on the **Restore > Browse** and then, click the down arrow in the **Look in** area.
3. Navigate to the backup that you wish to restore and double-click on it. All backups have a date and time stamp.
4. The backup file will appear in the field. Click **Start Restore**.
5. Click **Yes** to the message that appears.
6. To exit, click on **File > Exit**.

Database Maintenance: This utility resolves most error messages and performance issues quickly and easily.

Note: This can only be run at the computer where the database resides.

When to run the DB Maintenance

Run it any time that the program performs oddly. If you perform a routine task but get unusual results you may have database corruption.

Why to run the DB Maintenance

Run this utility to remove database corruption. A database can become corrupt a number of ways.

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

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

How to run the DB Maintenance

1. From the desktop, click your Windows **Start** button.
 2. Click **Programs or All Programs > Gradience > Maintenance** and select **DB Maintenance**.
 3. Click the **Start** button that appears on the DB maintenance popup.
 4. Close the DB maintenance utility when it is finished and try to open gradience again.
- If you have run this utility to resolve a performance issue but the issue persists you have two options:**

Option One:

Restore from a recent backup that was made prior to the issue that is now occurring. You will lose any data that had been entered since the time that the backup was made.

Option Two:

Do a backup and attach the backup to an e-mail and send it to Technical Support. Technical Support will “attempt” to remove the suspected database corruption that may be the cause of your underlying issue. Technical Support will return a clean backup to you that you can then restore into your database.

Technical Support:

For Free technical support, go to www.gradiencesupport.com and click on **Create Account** to create a FREE Gradience online support account. This account will allow you to create your own Gradience Help Desk Tickets. These are then sent directly to Gradience Tech Support.

Live technical support is FREE by phone during the 30-day Demo and for the first 30-days after purchase. After that, you would need to purchase a 12-month maintenance plan - or pay a per-call fee - or use our free online support as described above.

Training:

Technical Support does not provide assistance with learning how to use the software. Free instructions are available upon request. To get FREE 'How-To' instructions or to get FREE technical support, go to www.gradiencesupport.com and click **Login**.

Updating Gradience for FREE: Updates are FREE. Upgrades are not.

Print these steps first and then click the link below. Use the printed copy of these instructions to continue.

IMPORTANT! First be sure of your version number.

From within the software, click **Help** (next to **Reports**) at the top of the screen. When the drop-down menu opens, click **About**. A popup will open that will indicate your full, multi-digit version number.

- If your version number starts with **10**, we no longer have an installation file available for download, nor do we have a CD available, nor do we support that version. You will have to use a CD or installation file that you already have.
- If your version number starts with **11**, use the link shown below.

When the web page opens, look for the heading **Download Software**. Click on the name of the software you wish to download. If you use Windows Explorer, you will get a popup that will give you the opportunity to **Run**, **Save** or **Cancel** the download. **Do not click 'Run'**. Click **Save** and save it to your desktop. Once the download is complete, do not click **Run**, **Close** the download window and find the installation file on your desktop and follow the appropriate steps below.

Version 11 Pro/Enterprise Download Link: http://updates.gradiencesupport.com/download.aspx?product_id=18

IMPORTANT!

Before selecting one of the three installation choices below, be sure to verify where your database resides. If you do a Standalone installation on a computer that up to this point has been a Client Workstation, you will create a whole, new, blank database on "this" machine. You will no longer be able to access your existing database that resides on another machine. When you open the program, you will not see your data.

Updating Gradience on just one Computer:

Provided database resides on this computer rather than on another computer, click on the desktop shortcut that you just downloaded.. When you get the options of **Server**, **Client**, and **Standalone**, select **Standalone**.

When you get the options of **Custom** or **Express**, select **Express because the ini file already exists**. Then just click **Next** on each screen through to the end. When given the option to click **Test Connection do not bother**. Just continue to the end and click **Finish**.

Click the original desktop shortcut for your program to launch it. When you open the program, click **Help > About** to view the new multi-digit version number. Jot it down and always give this number to Tech Support when requesting assistance. Close the popup and use the program.

Updating Gradience on the Server:

When the database resides on the server, install the update there first. When given the choice of **Server**, **Client** or **Standalone**, select **Server**.

When given the choice between **Custom** and **Express** select **Express because the ini file already exists**. Then just click **Next** on each screen through to the end. When given the option to click **Test Connection do not bother**. Just continue to the end and click **Finish**.

Click the original desktop shortcut for your program to launch it. When you open the program, click **Help > About** to view the new version number. Jot it down and always give this number to Tech Support when requesting assistance. Close the popup and use the program.

Updating Gradience on a Client Workstation:

- **Updating an existing client:**
Navigate to the network folder where you pasted a copy of the installation file. Copy it again and paste it on the desktop. When given the choice between **Custom** and **Express**, select **Express** because the ini file already exists.
- **Installing on a new client:**
Navigate to the network folder where you pasted a copy of the installation file. Copy it again and paste it on the desktop. When given the choice between **Custom** and **Express**, select **Custom** and use the information you printed out or jotted down to point the client to the database on the server. **Do Not** map a drive and **Do Not** use UNC. Just point the client to the server name or IP address and to the "actual" drive and path. Repeat at any additional client workstations running this software.

Installing Gradience on Windows 7 and 64 Bit Operating Systems:

On Windows 7 (both 32 bit and 64 bit) we have found that the file that the software reads to know where to go to connect to the database typically does not get installed into the proper folder. This is easily remedied. Once this file is placed into the correct folder, the software runs fine. The name of the file is **hrware.ini**. On Windows 7 and 64 bit operating systems it needs to be installed at **c:\programdata\gradience**. Generally, the **programdata** folder is a hidden folder so you'll have to unhide it.

Look in **c:Windows** for the **hrware.ini** file, remove it from there and paste it into **c:\programdata\gradience**. If you can't find one, you'll have to create one in NotePad and paste it into **c:\programdata\gradience**. All that you need the file to have written on it is indicated below.

Your actual path may be different from what is shown below and your server name may be different as well. **DO NOT** use UNC. No double backslashes. Also **DO NOT** use a mapped drive. Our software uses TCP/IP to connect. The software looks to the machine and then to the actual drive and path on the host machine.

[HWARE]

PATH=c:\Program Files\Gradience\Data\Hrware.gdb (Your path may be different.)

SERVER=localhost (remember that if the database resides on another machine, this needs to be the name or IP address of that machine.)

Document URL:

Document for: Internal
 Public