

Gradience™ OSHA Manager

User Manual



Welcome!.....	3
Gradience OSHA Manager - New Features	3
Gradience OSHA Manager System Requirements	4
Installing Gradience OSHA Manager.....	4
Unlocking the Demo.....	5
Downloading and installing from our Web site.....	5
Using Gradience OSHA Manager	5
OSHA Manager Menu Commands.....	7
Contacting Technical Support	8
Running Gradience OSHA Manager in Demo mode	8

Welcome!

Congratulations! You're able to simplify one of the most complex compliance issues businesses face — documenting and reporting injuries and illnesses in accordance with OSHA guidelines.

Gradience OSHA Manager helps you fully record new injury and illness events, run mandatory and optional reports, and fully research federal OSHA record keeping guidelines. Please note state guidelines may require additional information and action.

Additionally, with our **ComplyRight™ SmartUpdate** system, your OSHA software is automatically updated with the latest in OSHA forms and guidelines. With Gradience OSHA Manager and ComplyRight, you will never be out of compliance again!

Gradience OSHA Manager - New Features

Gradience™ OSHA Manager has two important updates in the latest version:

AutoUpdate

The auto update function is designed to easily update existing applications to the latest version of those applications. Users no longer have to concern themselves with downloading and installing updates to Gradience software. The update system handles all updates automatically, making it practically seamless to update to the latest version.

Note:

Updates versus Upgrades Updates (also called minor updates) are updates where the first version number has not changed. For example, if you purchase a Gradience product with version 2.x.x., you can upgrade to any other version 2.x.x free of charge. Upgrades (also called major upgrades) are indicated by a change in the first version number. For example, when Gradience improves to the next higher first version number (from 5.x.x to 6.0.0), this is called a major upgrade. Major upgrades usually have a significant amount of new features and software improvements which warrant an additional charge. Most upgrades require an upgrade fee. When Gradience performs an AutoUpdate, the fixes applied are minor updates, and are available free of charge. Contact Gradience sales for more information on how to purchase major upgrades.

ComplyRight SmartUpdate

The ComplyRight SmartUpdate system is designed to automatically download and apply compliance updates to existing applications. Programs that use the SmartUpdate system remain compliant with the latest changes in laws and regulation as soon as they are available on the ComplyRight SmartUpdate system. Users can also rest assured, as all the content on the SmartUpdate system has been certified by the ComplyRight.

Gradience OSHA Manager 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
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

Installing Gradience OSHA Manager

The procedure to install Gradience OSHA Manager is shown below:

1. Close all programs running on your PC.
2. Insert the Forms CD-ROM into your computer's CD drive. Within moments, the installation menu will appear.
3. If the installation menu does not appear, click Start, Run, and enter **D:\Setup.exe** where D: is the letter of your CD ROM drive. Click **OK** or press **Enter**.
4. Select Install OSHA. This will begin the installation process.
5. Enter your **Product Key** or click the **DEMO** button to continue.
6. Click "Yes" if you agree with the Software License Agreement to continue installing. (If you click "No", this will end the installation process.)

After installation is complete, click **Finish**. The Gradience program group will be added to your Start menu and the Gradience OSHA Manager icon will now appear on your Windows desktop. Double-click the icon to launch the program. You're ready to start!

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 Type DEMO and 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.

Previous Installation

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

- Open Gradience OSHA Manager
- Select **Enter Product Key** from the Help menu.
- **Enter** the Product Key you received with your purchase. This will be located inside of the **QuickStart Guide** and/or sent to your email address (contact Technical Support for assistance with getting your Product Key via email).
- 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 product.

Downloading and installing from our Web site

From time to time, we release updates to the program. If you want to download and install a program update or if you need to reinstall but your CD-ROM was lost or damaged, here's how:

1. Open your Web browser (e.g., Internet Explorer) and go to <http://www.gradiencessupport.com>. Click on Download the Latest Version of Our Software, select OSHA Manager, then on the download link. When the download dialog box appears, save the file to your desktop or a preferred location.
2. Upon completion of the download, close all programs running on your PC.
3. Locate the OSHA Manager Install file and double-click to begin the installation process.

Follow the prompts to install your software.

After the installation is complete, the Gradience program group will be added to your Start menu and the Gradience OSHA Manager icon will appear on your desktop.

Using Gradience OSHA Manager

Using Gradience OSHA Manager is an easy process. Here are some quick setup steps to get you started.

Establishment Information

The first window you will see is the Establishment Information window. Here you will enter your establishment name and address, Industry description (manufacture of motor truck trailers, medical supply distribution, restaurant, etc.).

In a text field below this you will be asked to provide your SIC (Standard Industrial Classification).

Finally, if you know your NAICS (North American Industrial Classification) number, you can enter it here as well. After you finish entering the required information, click **Save**.

Injury / Illness Event tab

After entering your Establishment Information, you will next view the main OSHA window. The first tab is the Injury / Illness Event tab. This tab has two buttons, one which lets you **Create a New Event** and a second labeled **Find Existing Event** used to retrieve events already entered in the system.

If you need to create a new event for an injury or illness, click **Create New Event**.

Create New Event - Click this button to create a new event. On the window which appears, you will be given a selection of questions to answer regarding the event. Two buttons, **Next** and **Cancel**, let you navigate to more options or stop the event process. The first window which appears asks you to answer five questions which will determine whether or not the event needs to be recorded or not according to OSHA standards. After answering the questions and clicking Next, Gradience OSHA Manager tells you if the event needs to be recorded, and if **NOT**, why the event does not require recording. Click the **Tell Me Why** button to view information on why OSHA does not require recording of this event. Otherwise, click **OK** to return to the main window.

What happens if the event needs to be recorded?

If the event needs to be recorded, Gradience OSHA Manager will take you to the next screen which contains questions regarding the event. you start with the **Report Date**, and answer if this case is a "privacy concern" case (Click the green Help icon to the right of the question to read more about privacy concern cases). You will be asked for information on the individual entering the form data, the employee, and information about the case. Once complete, click **Save** to record the event.

Find Existing Event - Click this button to find an event you have already recorded.

Reports tab

The Reports tab allows you access to all OSHA reports. From here, you can select a report and run reports which are associated with a case. There are nine reports you can run, and each can be individually selected by clicking the option button next to the report name. Once you click an option button, the summary for the report and the purpose for which the report is used will appear below.

Research OSHA Rules tab

This tab provides research information which is updated regularly via ComplyRight SmartUpdate. New rules will be automatically downloaded periodically, or whenever you update the software (and provided new OSHA rules are available, of course).

Summary

In this topic we discussed how to use Gradience OSHA Manager, the menu items, and selected window. Now you should be familiar enough with Gradience OSHA Manager to use the program in your daily work. Remember to record events as they occur according to OSHA record keeping requirements.

OSHA Manager Menu Commands

Here's an overview of each drop down menu and listed commands:

File Menu

- **New Injury/Illness Event** – First, it asks a series of question to ensure OSHA considers an injury or illness as an event which needs to be recorded, lets you enter all the details of the event. If you're adding or changing information to an existing event, click on the Injury / Illness Event tab, then Find Existing Event.
- **Delete Event**– Permanently removes an injury or illness event. Note: This cannot be undone. You must be on the Find Existing Event screen to delete an event.
- **Maintenance**– Lets you Backup of all information you've entered, as well as all published OSHA reports. If you need to go back to the last backup created, choose Restore. Caution: Restore will overwrite any data entered since the last backup!
- **Exit**– Closes OSHA Manager.

Edit Menu

- **Establishment Information** – Lets you enter or edit information about your business establishment, such as the name, address and SIC code. This information is mandatory for some OSHA reports.
- **Set Password**– Gives you the option of creating a login name and password to limit access to OSHA Manager. You may want to do this to protect sensitive or private information.

View Menu

- **Published OSHA Reports** – Lists official OSHA reports that you have generated by date and time, allowing you to see any changes that may have occurred.
- **OSHA 1904 Regulations**– Takes you to the full text of OSHA Section 1904.
- **View Disclaimer**– Displays the software license agreement and disclaimer that you agreed to when installing and running the program for the first time.

Help Menu

- **Contents** – Brings up a list of help topics.
- **Check for Updates** - Manually check for updates by clicking this item.
- **Automatic Updates** - Turn Automatic Updates on or off. If turned on, a check mark appears beside this menu item. With this option enabled, Gradience will check for an update each time the program is launched.
- **Enter Product Key Code** – Allows you to enter the product key code and unlock all OSHA Manager features. If you have entered information and passed the 30-day demo period, entering the unlock code will give you full access to your data.
- **About**– Displays the program version information.

Contacting Technical Support

Technical Support for Gradience OSHA Manager is available as follows:

Internet: <http://www.gradiencessupport.com>

Phone Requests: 888-925-7740 (8:30 a.m. to 6:00 p.m., EST, Monday-Friday)

Running Gradience OSHA Manager in Demo mode

If you've installed the software and entered Demo for the Product Key Code, you can evaluate it for 30 days.

In demo mode, reports will be generated with "Sample" on them.

After the demo period, the program goes into read-only mode and will not allow you to enter new or edit existing events. However, once you purchase the software and enter the product unlock code, all your previously entered data will be available, and all features will be available.