



Open Range
SOFTWARE

CTS User Manual

Electronic Document Retrieval (EDR)

Last Edited: 23 August 2022

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Introduction

The CTS Electronic Document Retrieval (EDR) program provides a user-friendly system to record, manage, and report document information. This software is a powerful tool for effectively managing attachments for long-term retention.

Safety professionals create many unique record types such as exposure monitoring, lab chain of custody, hazard assessment surveys, recommendations for job-hazard control, respirator fit testing, confined space inventories, laser inventories, ergonomic surveys, injury/illness reports, freedom of information requests, compliance audits and many more.

By allowing users to scan each record and index it in a way that makes sense for retrieval, EDR can save your company time and money.

EDR is implemented through three areas:

- EDR Entry
- EDR Reports
- EDR Support

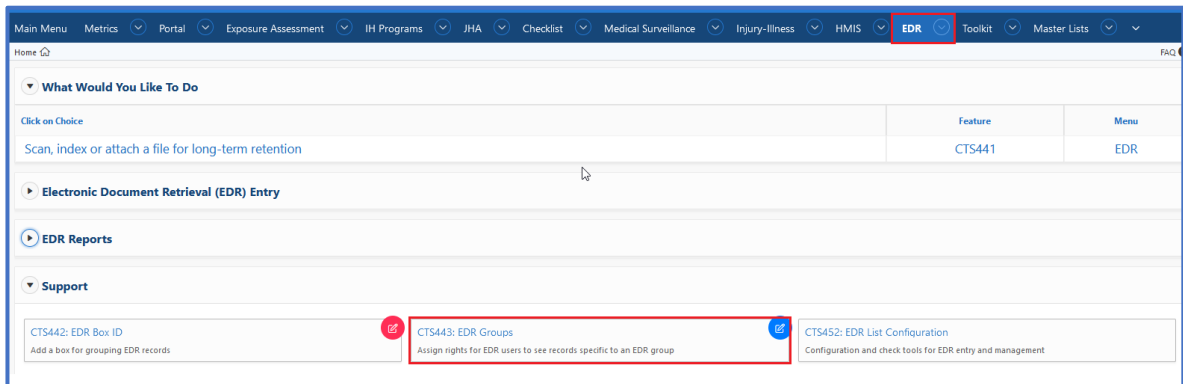
Chapter 1 – EDR Groups

Assign rights for EDR users to see records specific to an EDR group.

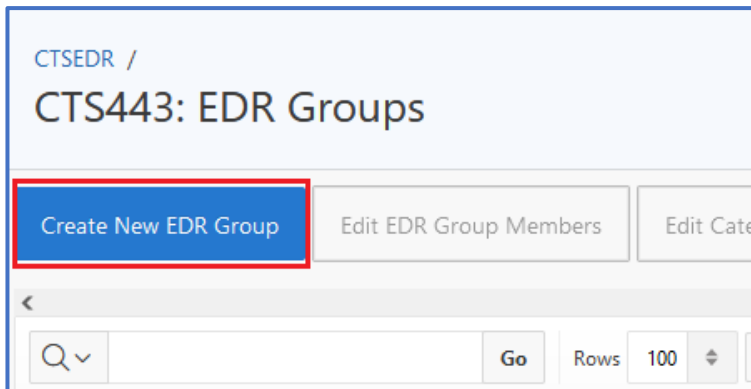
CTS443: EDR Groups

Create New EDR Group

Click CTS443: EDR Groups button.

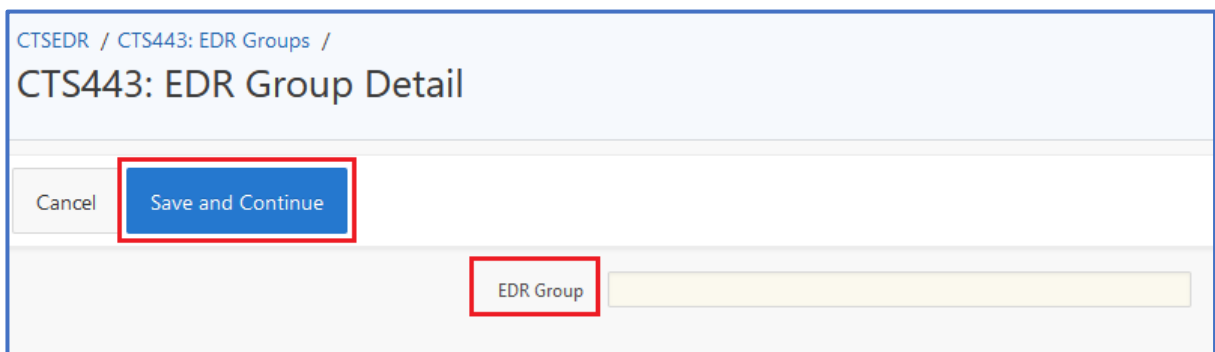


Click **Create New EDR Group** button.



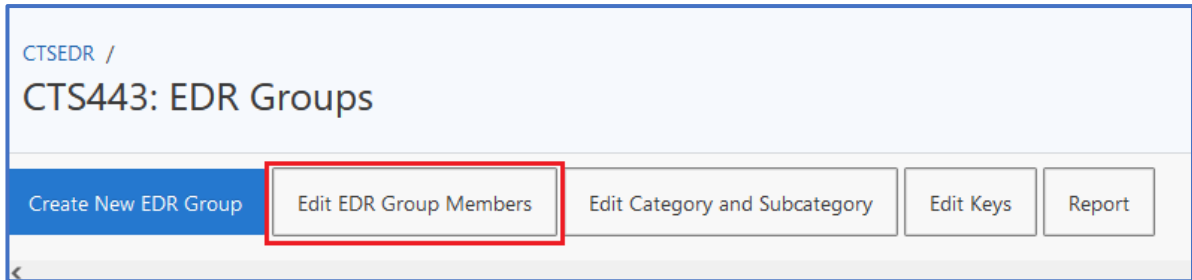
Enter *EDR Group* name.

Click **Save and Continue** button.



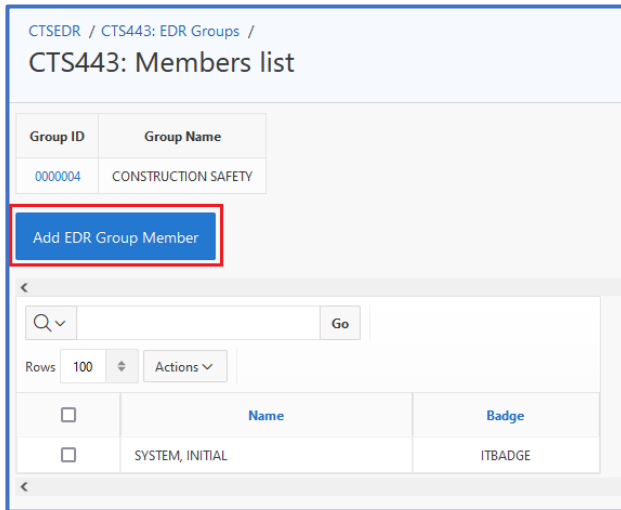
Field	Description
<i>EDR Group</i>	Enter EDR Group name.

Click **Edit EDR Group Members** button.

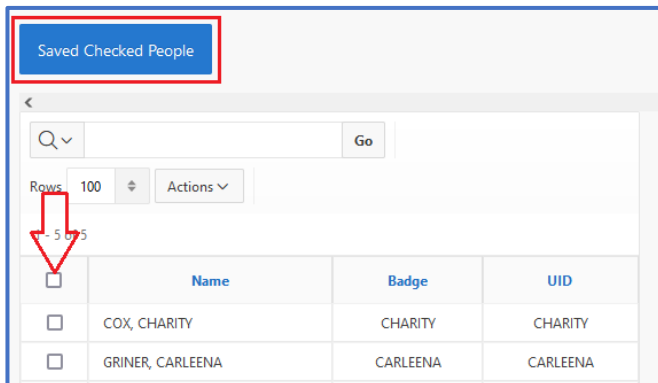


Existing group members are listed here.

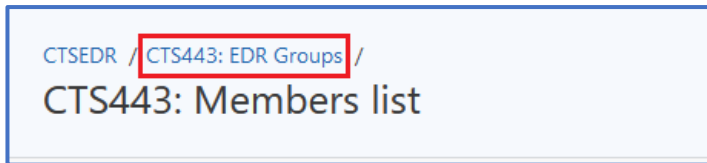
Click **Add EDR Group Member** button to add a new member.



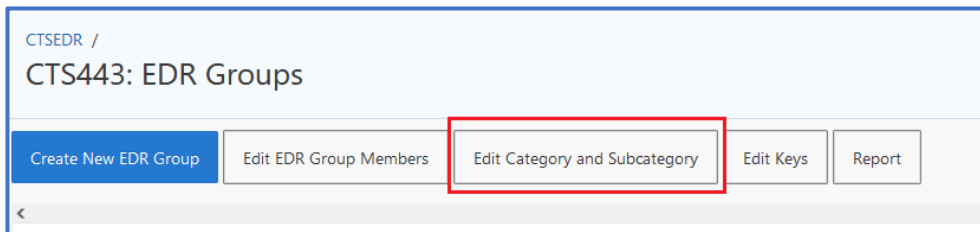
Click checkbox(es) to select members. Click **Saved Checked People** button.



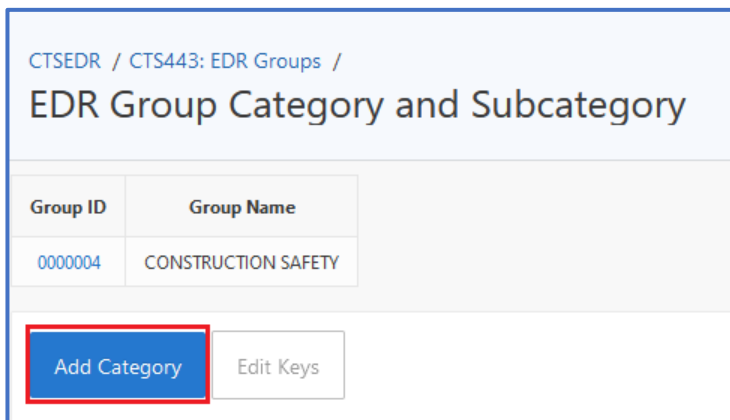
Click *CTS443: EDR Groups* / breadcrumb to return to EDR Groups.



Click **Edit Category and Subcategory** button.

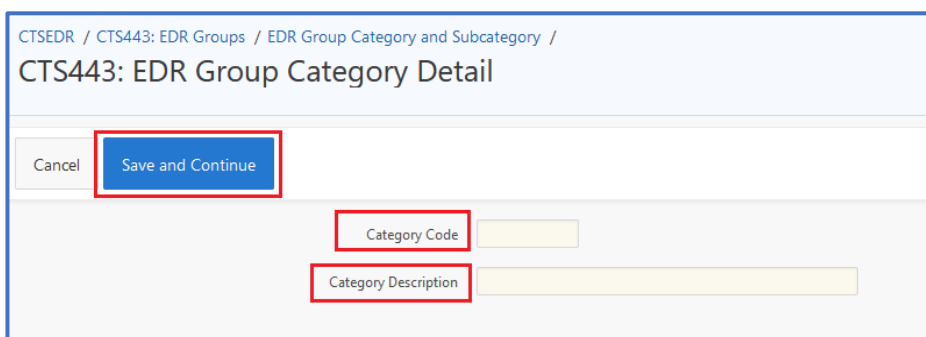


Click **Add Category** button.



Enter *Category Code* and *Category Description*.

Click **Save and Continue** button.



Field	Description
<i>Category Code</i>	Enter category code.
<i>Category Description</i>	Enter category description.

Click radio button to select a category.

Click **Add Subcategory** button.

<input checked="" type="radio"/>	<input type="checkbox"/>		ACCIDENT REPORT	1234	-
<input type="radio"/>	<input type="checkbox"/>		SAFETY CHECKLIST	SC	-

no data found

Enter *Subcategory Code* and *Subcategory Description*.

Click **Save and Continue** button.

CTS443: Subcategory Detail

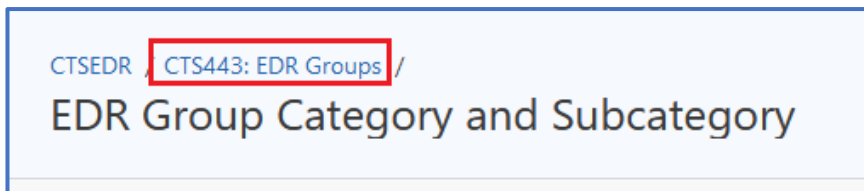
Cancel **Save and Continue**

Subcategory Code

Subcategory Description

Field	Description
<i>Subcategory Code</i>	Enter subcategory code.
<i>Subcategory Description</i>	Enter subcategory description.

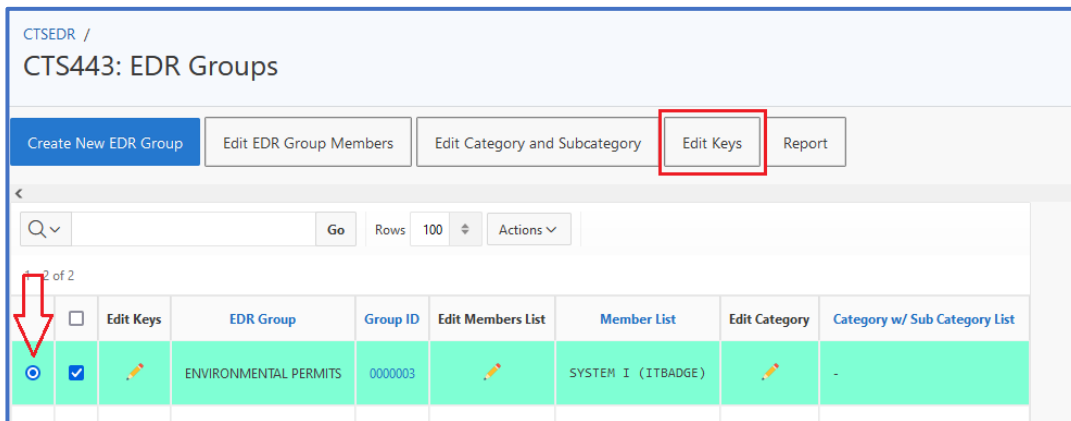
Click *CTS443: EDR Groups* / breadcrumb to return to EDR Groups screen.



Edit Existing EDR Groups

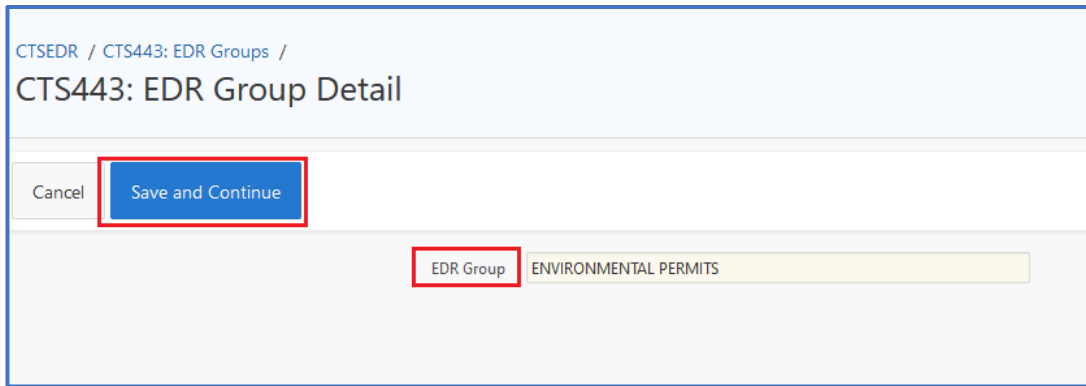
Click radio button to select an EDR group.

Click **Edit Keys** button.



Enter *EDR Group* name.

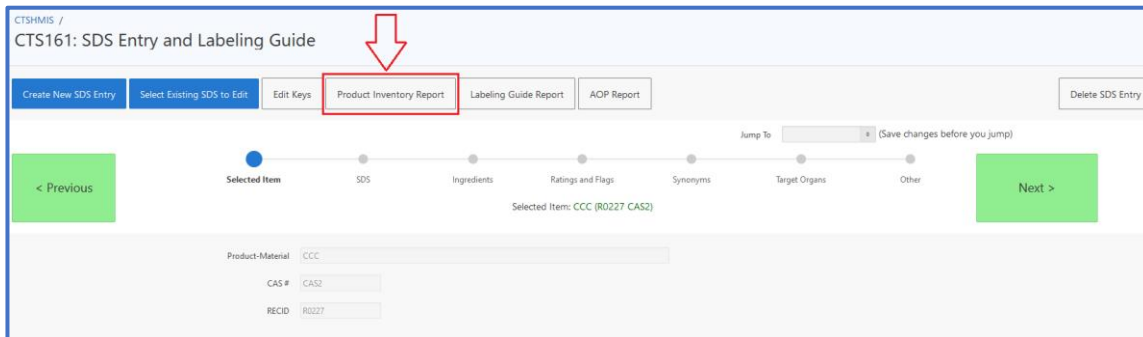
Click **Save and Continue** button.



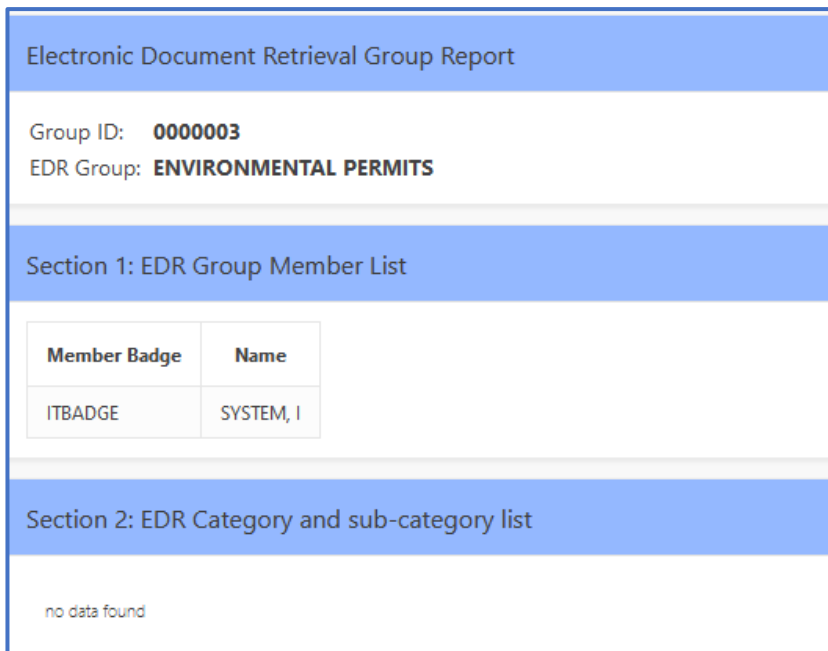
Print EDR Report

Click radio button to select an existing EDR group.

Click **Report** button.



The report is displayed in a new browser tab.

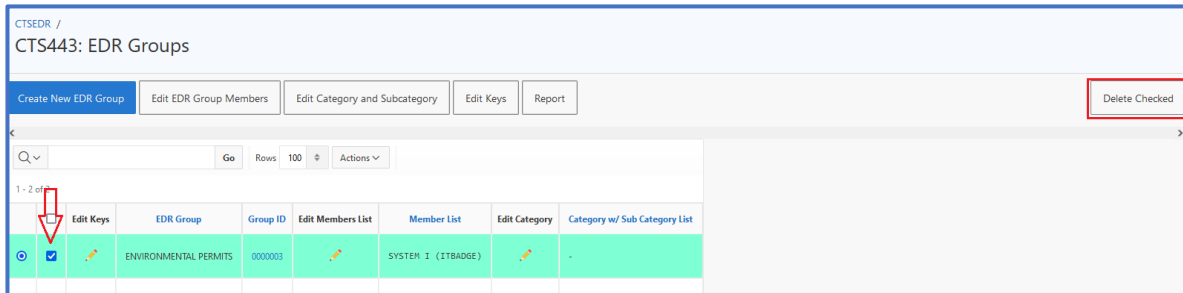


Close browser tab when finished viewing.

Delete An EDR Group

Click a checkbox to select an EDR group.

Click **Delete Checked** button.



Click **OK** button in alert box to confirm delete.

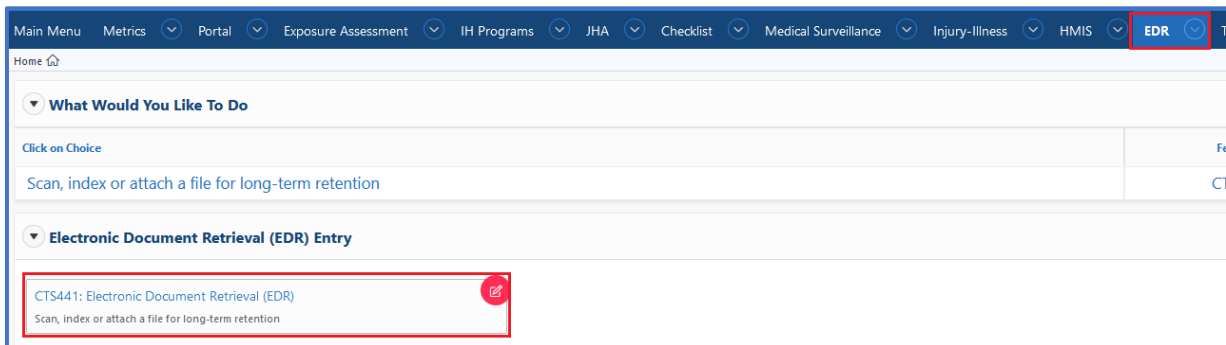
Chapter 2 – EDR Entry

The CTS EDR program allows users to scan, index, or attach files for long-term retention. This chapter explains how to execute these tasks.

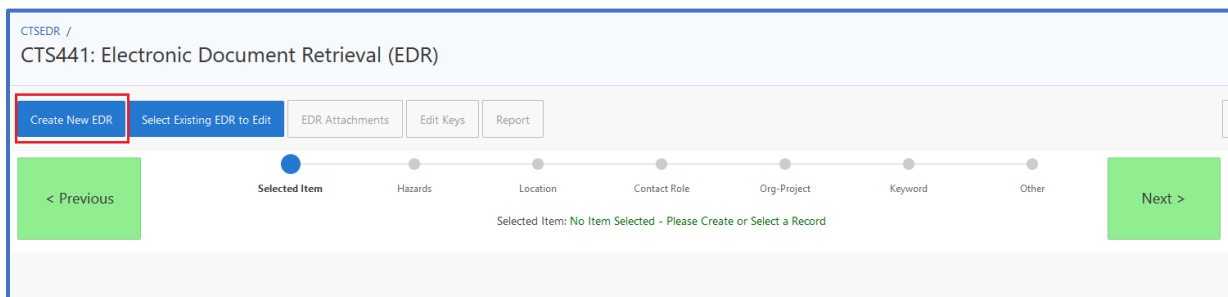
CTS441: Electronic Document Retrieval (EDR)

Create New EDR

To add an EDR, click **CTS441: Electronic Document Retrieval (EDR)** under *Electronic Document Retrieval (EDR)* submenu.



Click **Create New EDR** button.



Enter *User Doc ID* in text field or click the asterisk (*) button to auto-assign ID.

Enter Other Reference ID.


Use calendar buttons to select *EDR Start Date* and *EDR End Date*.

Use pulldown menus to select *EDR Group Category*, *Site*, and *Company*.

Click **Save and Continue** button.

CTSEDR / CTS441: Electronic Document Retrieval (EDR) /
 CTS441 - Add EDR


Cancel **Save and Continue**


EDR Group Category 


User Doc ID *


EDR Title

Other Reference ID

EDR Start Date  (mm/dd/yyyy)

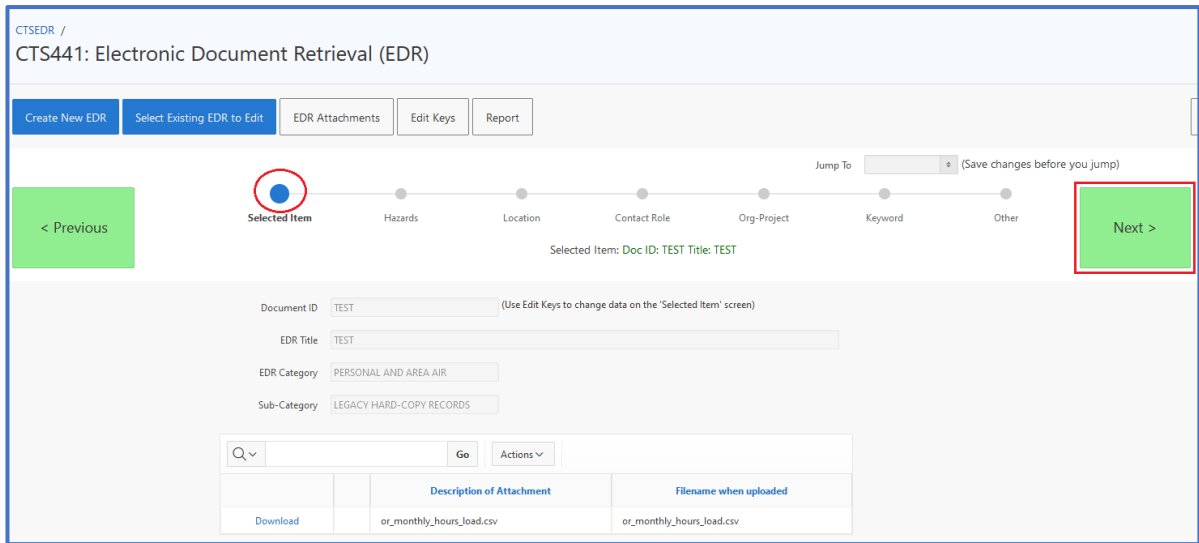
EDR End Date 

Site SITE (SITE) 

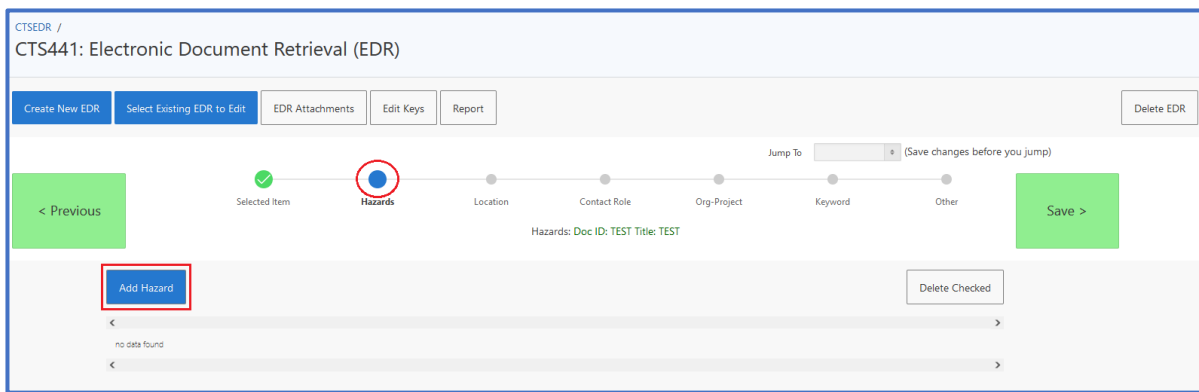
Company COMPANY (COMPANY) 

FIELD	DESCRIPTION
<i>EDR Group Category</i>	Select EDR group category.
<i>User Doc ID</i>	Enter User Doc ID.
<i>EDR Title</i>	Enter EDR title.
<i>Other Reference ID</i>	Enter other reference ID, if applicable.
<i>EDR Start Date</i>	Use calendar button to select start date.
<i>EDR End Date</i>	Use calendar button to select end date.
<i>Site</i>	Select the site where EDR is located.
<i>Company</i>	Select the company where EDR is located.

Click **Next** button to proceed to *Hazards* screen.

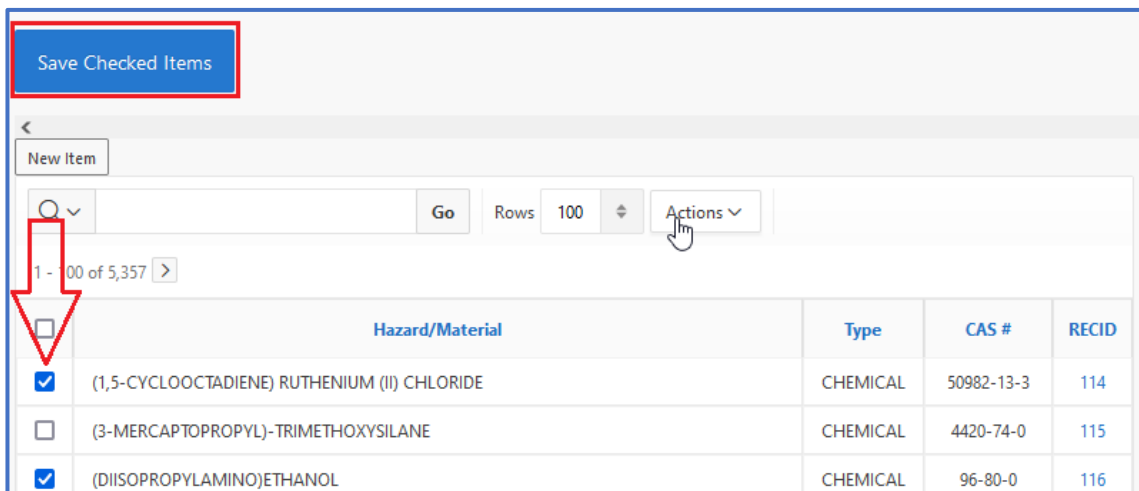


Click **Add Hazard** button.



Click checkbox(es) to select hazards and/or materials.

Click **Save Checked Items** button.



Click **Save** button.

The screenshot shows the 'CTS441: Electronic Document Retrieval (EDR)' interface. At the top, there are navigation buttons: 'Create New EDR', 'Select Existing EDR to Edit', 'EDR Attachments', 'Edit Keys', and 'Report'. Below these is a breadcrumb trail with steps: 'Selected Item' (checked), 'Hazards' (active), 'Location', 'Contact Role', 'Org-Project', 'Keyword', and 'Other'. A 'Save >' button is highlighted with a red box. Below the breadcrumb, there is an 'Add Hazard' button and a 'Delete Checked' button. A list of hazards is visible, including 'Hazard-Material-Agent', '(1,5-CYCLOOCTADIENE) RUTHENIUM (II) CHLORIDE', '(DIISOPROPYLAMINO)ETHANOL', and '(S)-(-)-1,2,4-BUTANETRIOL'.

Click **Add Location** button.

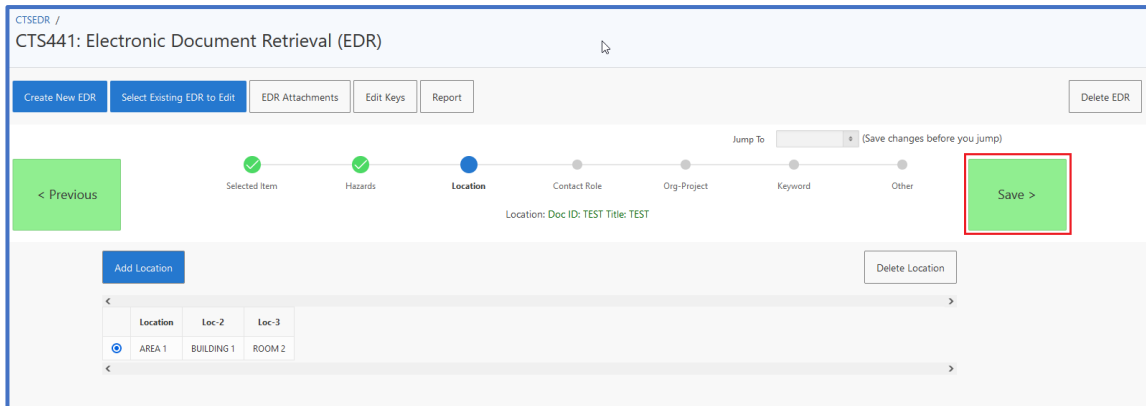
The screenshot shows the 'CTS441: Electronic Document Retrieval (EDR)' interface. The breadcrumb trail now includes 'Location' (active). The 'Add Location' button is highlighted with a red box. The 'Add Hazard' button is no longer visible.

Click blue **Select** text to choose a location.

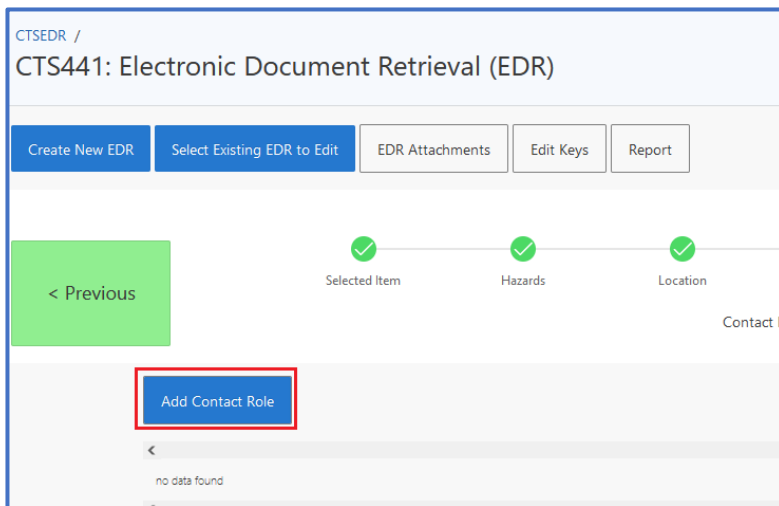
The screenshot shows a table titled '< Return Without Selection'. The table has columns: 'Location', 'Loc-2', 'Loc-3', 'Location Name', 'Code', 'Site', and 'Company'. The first row is highlighted, and the 'Select' text in the first column is highlighted with a red box.

	Location ↑	Loc-2	Loc-3	Location Name	Code	Site	Company
Select	AREA 1	-	-	-	F00004	SITE	COMPANY
Select	AREA 1	BUILDING 1	-	-	F00003	SITE	COMPANY
Select	AREA 1	BUILDING 1	ROOM 1	-	F00002	SITE	COMPANY

Click **Save** button.



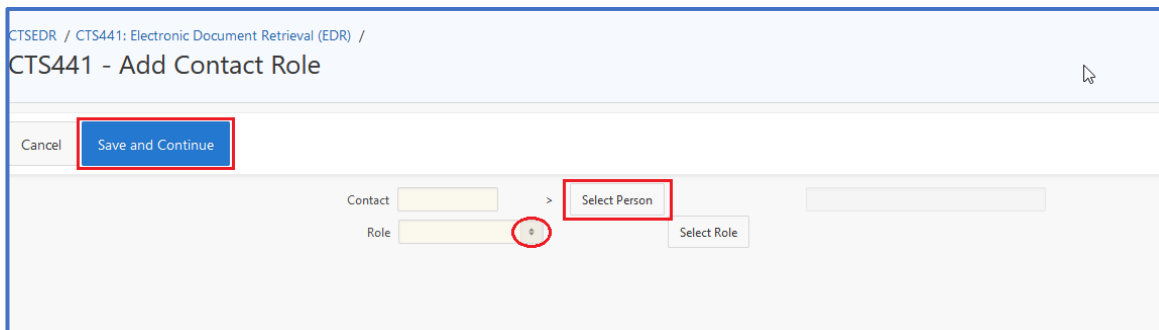
Click **Add Contact Role** button.



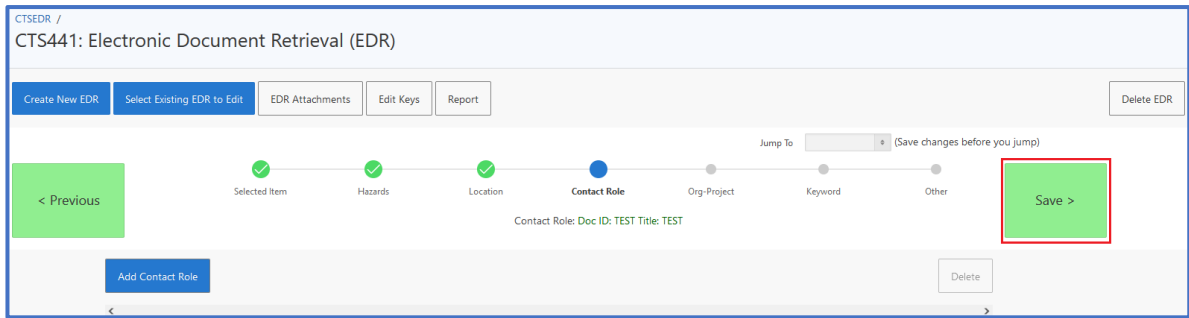
Click **Select Person** button to select a contact.

Use pulldown menu to select *Role*.

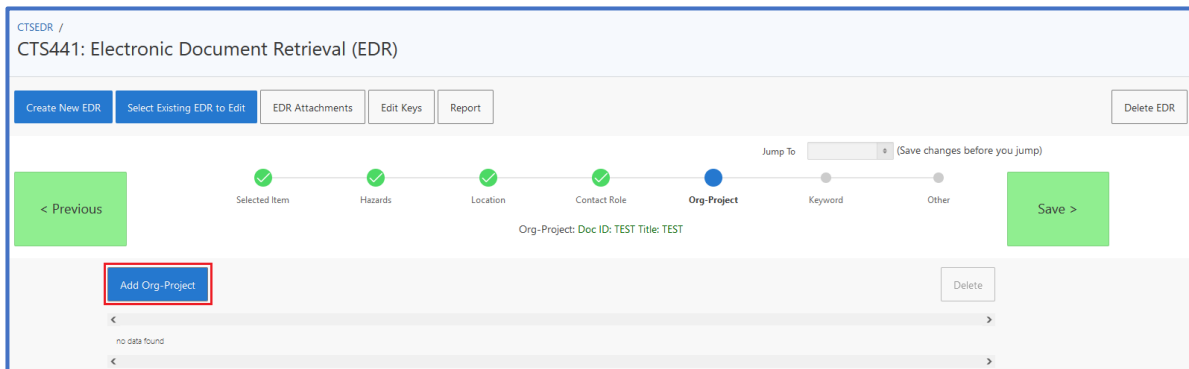
Click **Save and Continue** button.



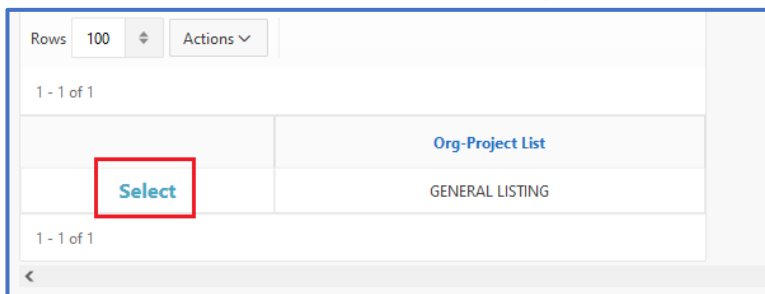
Click **Save** button.



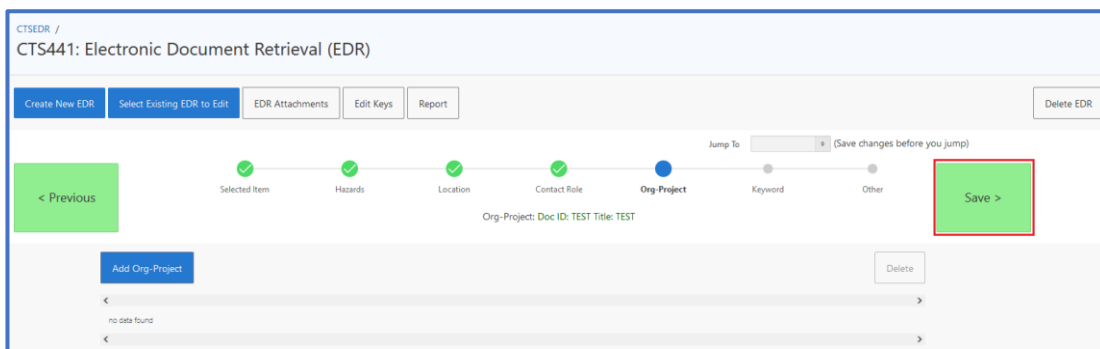
Click **Add Org-Project** button.



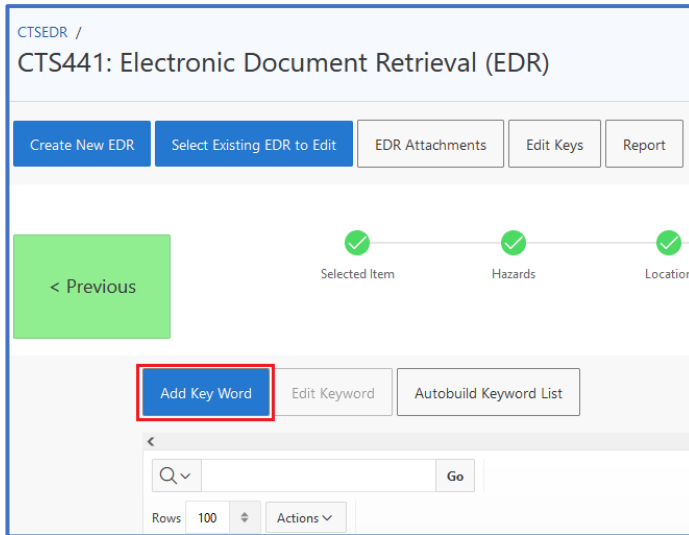
Click blue **Select** text to choose an organization/project.



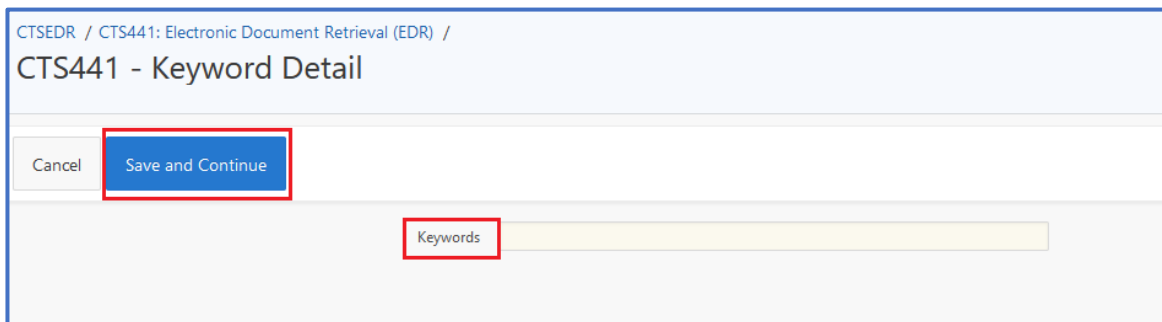
Click **Save** button.



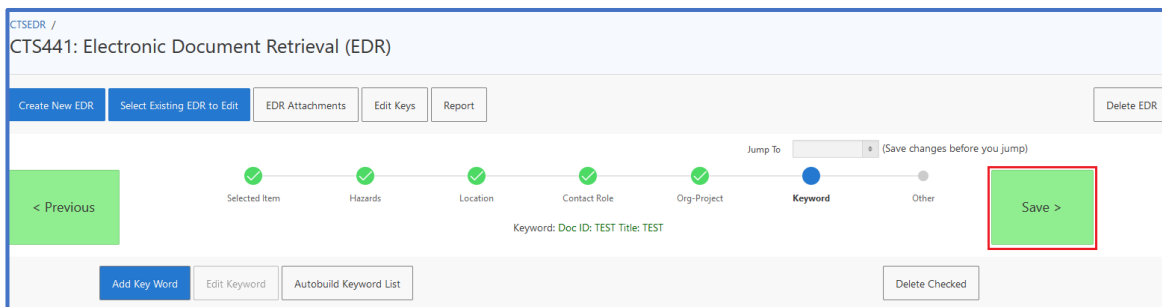
Click **Add Key Word** button.



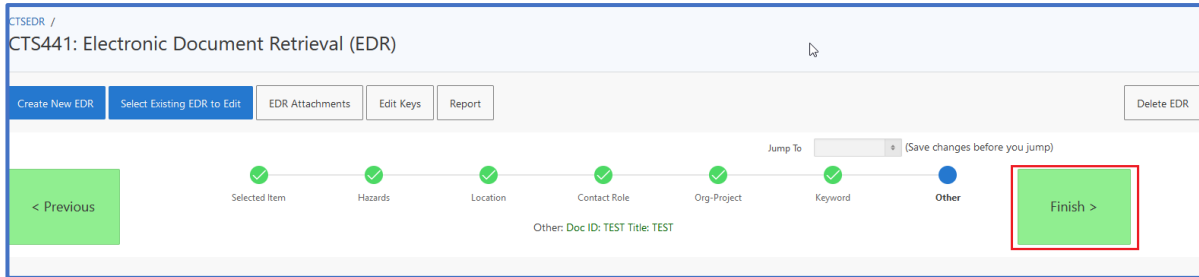
Enter text into *Keywords* text box.
Click **Save and Continue** button.



Click **Save** button.

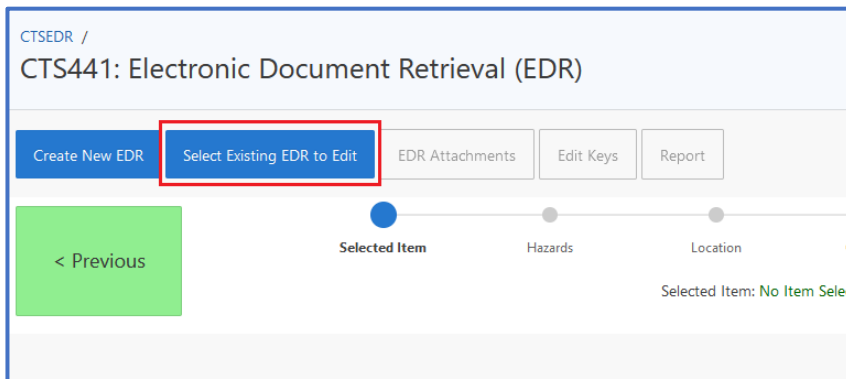


On *Other* screen, click **Finish** button.

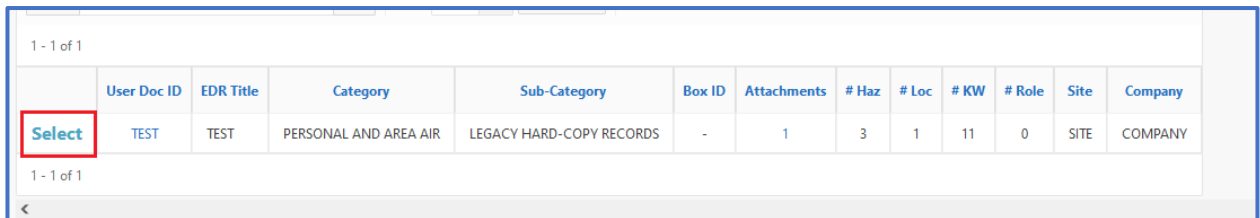


Edit Existing EDR

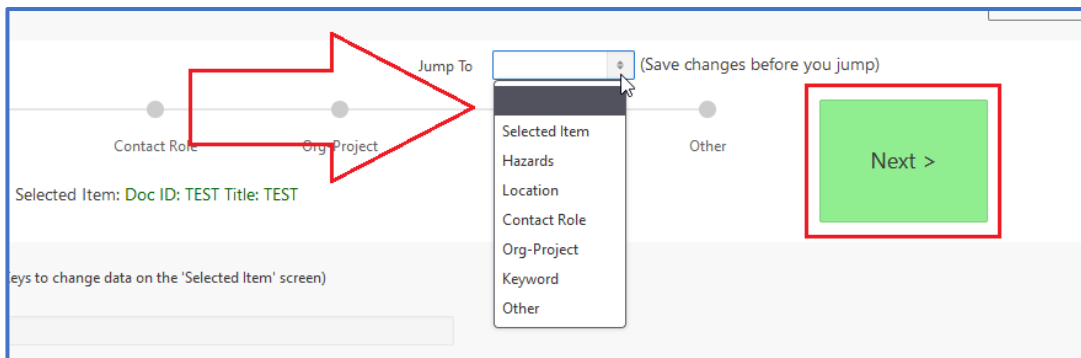
To edit an existing EDR, click **Select Existing EDR to Edit** button.



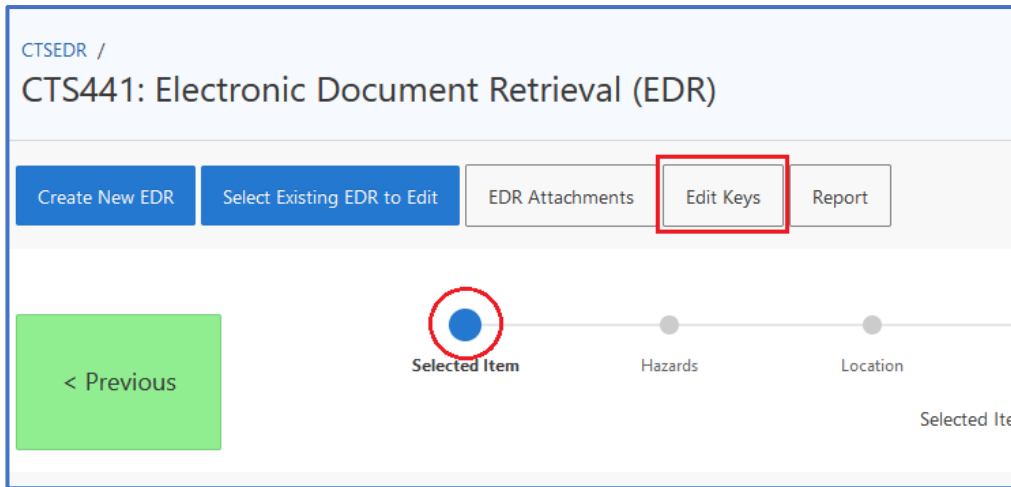
Click blue **Select** text to choose an EDR.



From *Selected Item* screen, use pulldown 'Jump To' menu to navigate to *Hazards*, *Location*, *Contact Role*, *Org-Project*, *Keyword*, or *Other* screen to make edits. Click **Next** or **Finish** button to save changes.

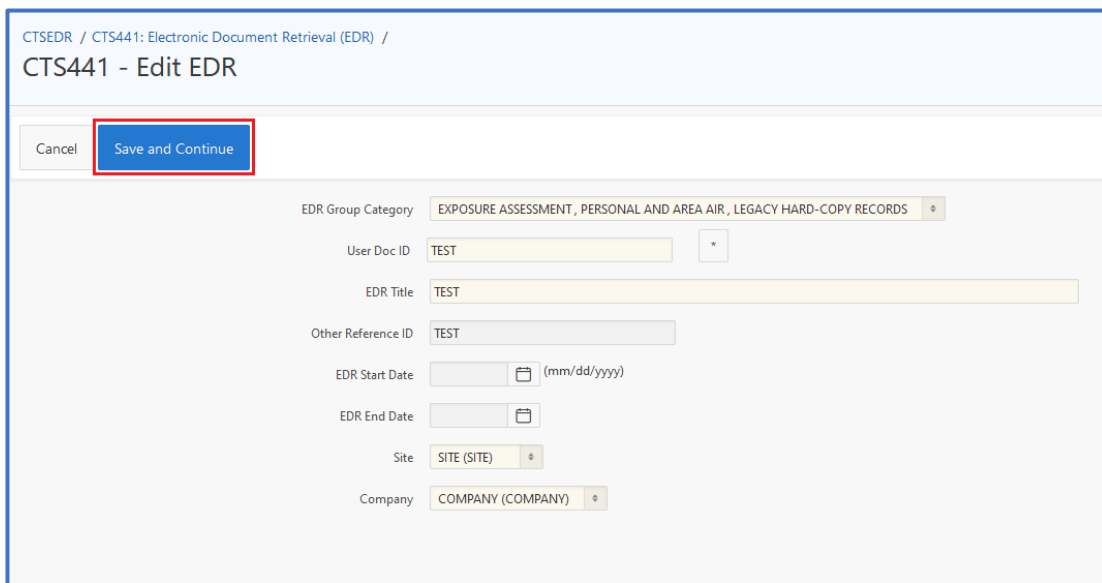


From *Selected Item* screen, click **Edit Keys** button.

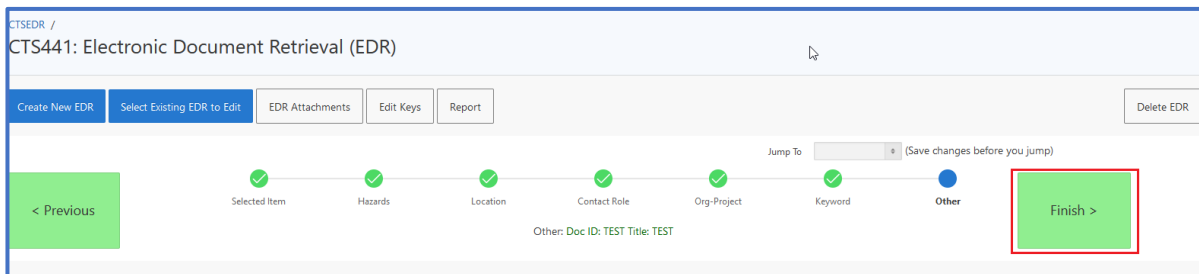


Edit EDR details.

Click **Save and Continue** button.

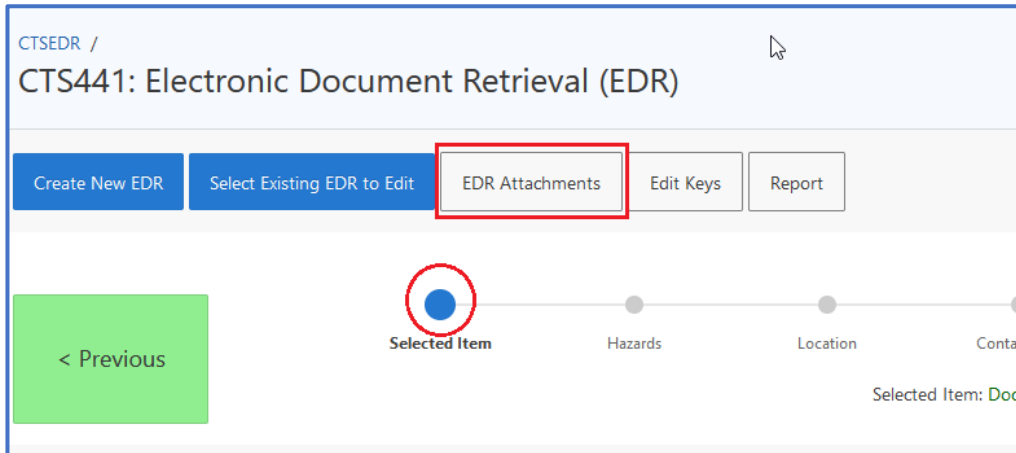


Click **Finish** button to save changes.



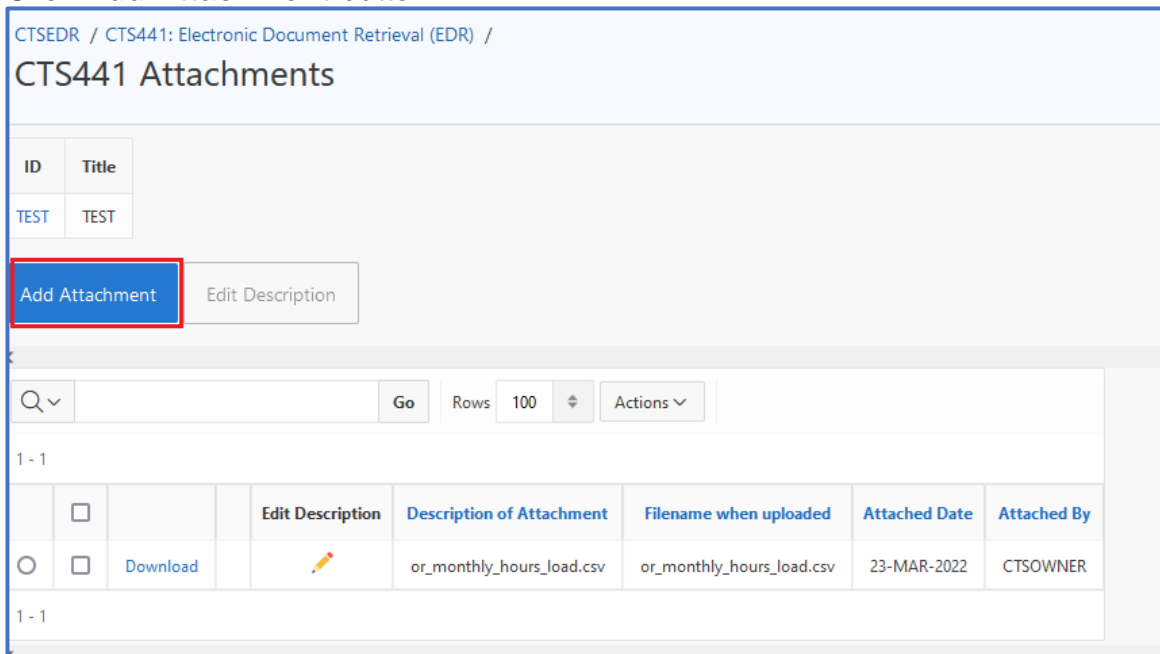
EDR Attachments

From *Selected Item* screen, click **EDR Attachments** button.

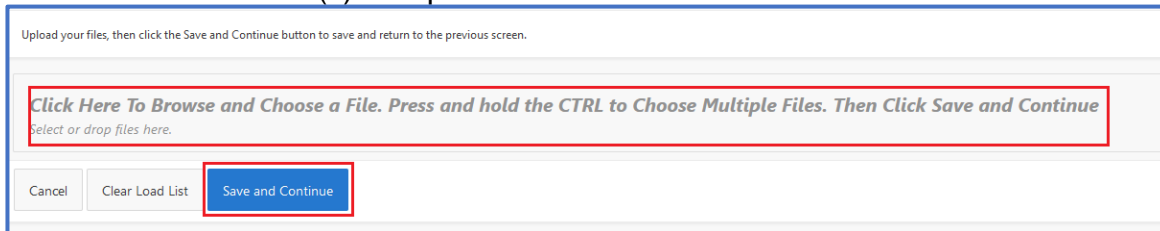


A list of current attachments is displayed on-screen.

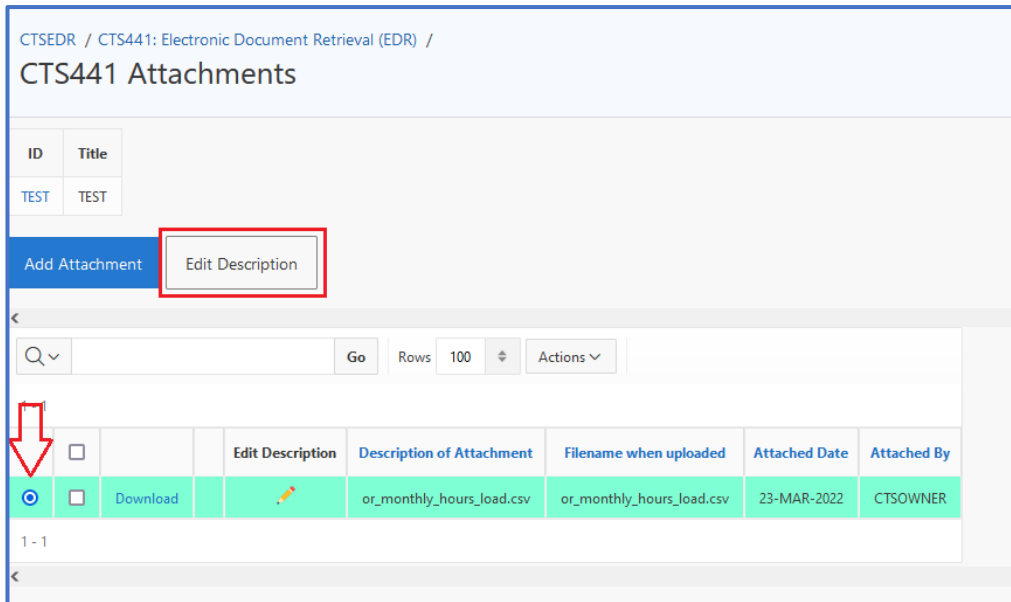
Click **Add Attachment** button.



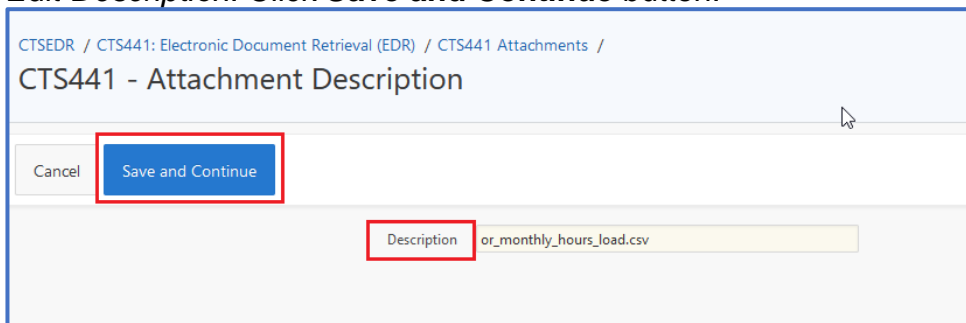
Browse and select file(s) for upload. Click **Save and Continue** button.



Click radio button to select an attachment. Click **Edit Description** button.



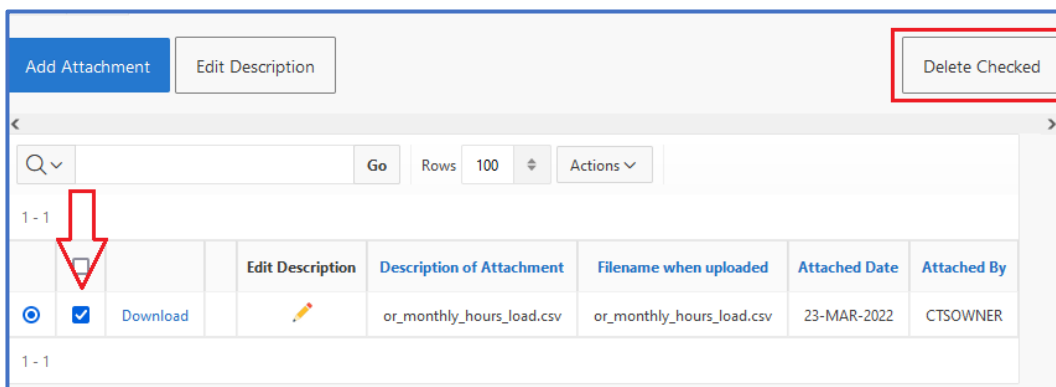
Edit *Description*. Click **Save and Continue** button.



To delete an attachment, from the *Selected Item* screen, click the **EDR Attachments** button.

Click checkbox(es) to select attachment(s). Click **Delete Checked** button.

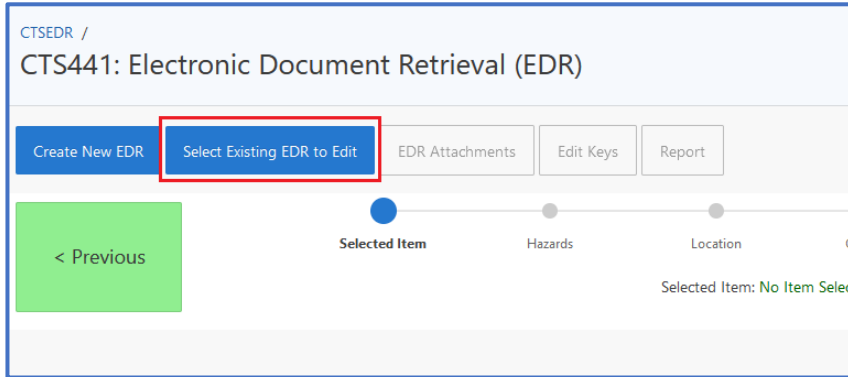
Click **OK** in alert box to confirm delete.



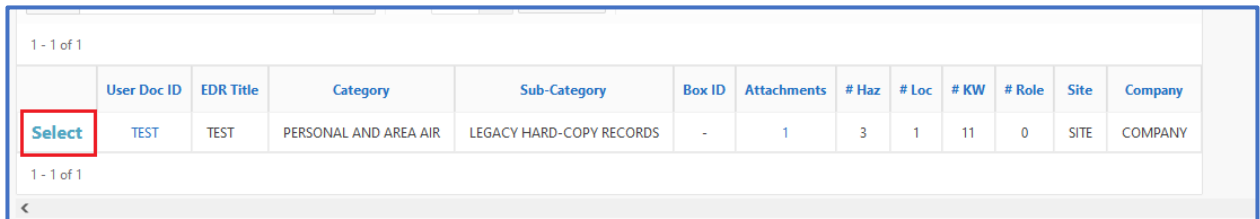
Click *CTS441: Electronic Document Retrieval (EDR)* / breadcrumb to return to EDR screen.

Print EDR Report

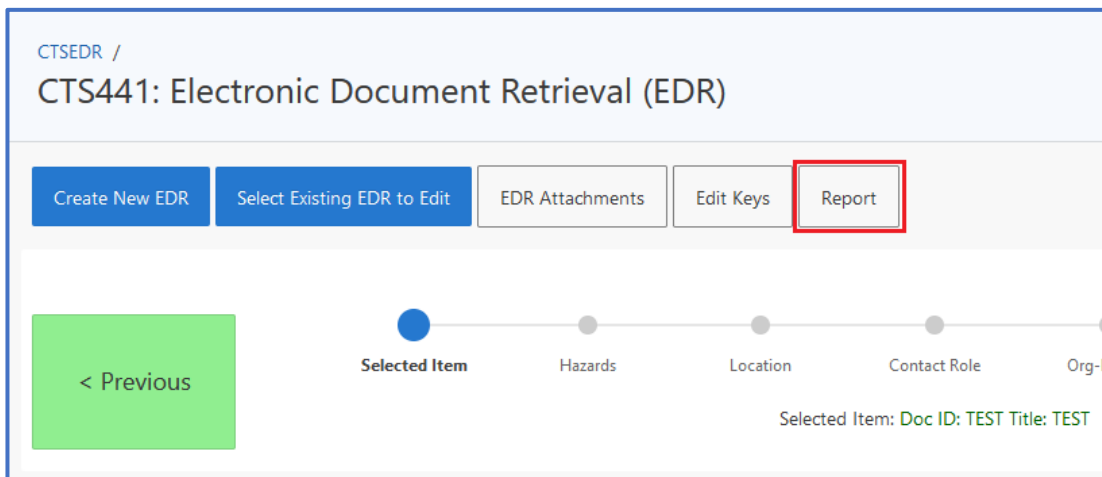
Click **Select Existing EDR to Edit** button.



Click blue **Select** text to choose an EDR.



Click **Report** button.



Report is displayed in a new browser tab.

Electronic Document Retrieval Report				
Group Category PERSONAL AND AREA AIR , LEGACY HARD-COPY RECORDS				
Document ID TEST				
Document Title TEST				
Other reference ID TEST				
Hazard List				
Hazardous material/hazard				
(1,5-CYCLOOCTADIENE) RUTHENIUM (II) CHLORIDE				
(DIISOPROPYLAMINO)ETHANOL				
(S)-(-)-1,2,4-BUTANETRIOL				
Location List				
Location				
AREA 1 BUILDING 1 ROOM 2				
Key Word List				
(1,5-CYCLOOCTADIENE) RUTHENIUM (II) CHLORIDE (DIISOPROPYLAMINO)ETHANOL (S)-(-)-1,2,4-BUTANETRIOL AREA 1 BUILDING 1 COMPANY SITE LG LEGACY HARD-COPY RECORDS PA PERSONAL AND AREA AIR ROOM 2 TEST TEST TEST				
Attachments				
	Description of attachment	Filename When Uploaded	Keyer	Mod date
Download	or_monthly_hours_load.csv	or_monthly_hours_load.csv	CTSOWNER	23-MAR-2022

Close browser tab(s) when finished viewing report(s).

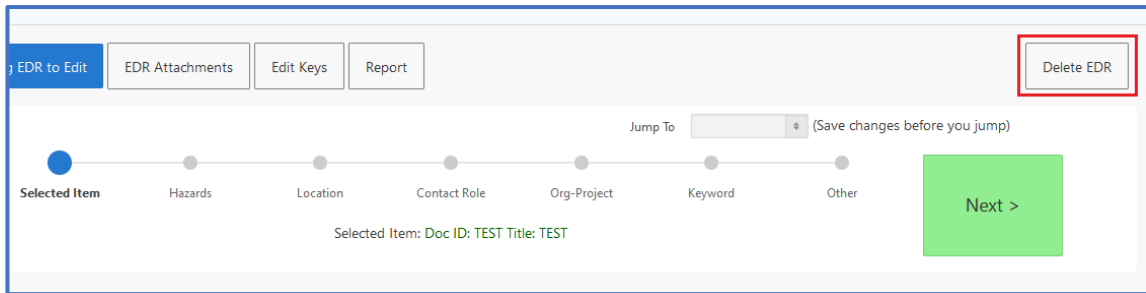
Delete EDR

To delete a control area, Click **Select Existing EDR to Edit** button.

Click blue **Select** text to choose an EDR.

1 - 1 of 1													
	User Doc ID	EDR Title	Category	Sub-Category	Box ID	Attachments	# Haz	# Loc	# KW	# Role	Site	Company	
Select	TEST	TEST	PERSONAL AND AREA AIR	LEGACY HARD-COPY RECORDS	-	1	3	1	11	0	SITE	COMPANY	
1 - 1 of 1													

Click **Delete EDR** button.



Click **OK** button in alert box to confirm delete.

