

# QUICK REFERENCE GUIDE - ACCEPTING A CLOSE CALL

## Introduction

When a close call event is entered that is assigned to a project (or level of the organisation hierarchy), the RM assigned to that project will receive notification via email. The email will look like this

Event Date: 11/7/17 8:59 AM

Event Location: LEEDS CITY STATION

Project/Division: LEEDS CITY STATION

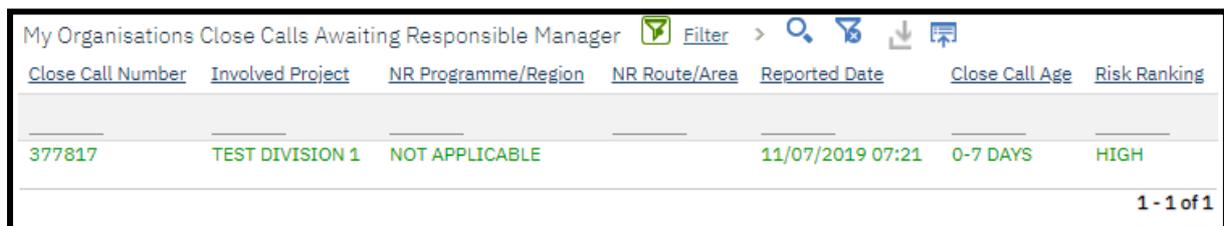
Risk Ranking: HIGH

Event Description: Test

Please log on to the [Close Call System](#) and complete the required actions for this reported Close Call. This Close Call must accepted or rejected by you within a reasonable timeframe in line with guidance.

Each email will have a Hyperlink which will take them directly to the close call event

If an RM is logged into Close Call, they can view any close calls requiring action by then via the 'My Organisations Close Calls Awaiting Responsible Manager' portlet, which look likes this



<a href="#">Close Call Number</a>	<a href="#">Involved Project</a>	<a href="#">NR Programme/Region</a>	<a href="#">NR Route/Area</a>	<a href="#">Reported Date</a>	<a href="#">Close Call Age</a>	<a href="#">Risk Ranking</a>
377817	TEST DIVISION 1	NOT APPLICABLE		11/07/2019 07:21	0-7 DAYS	HIGH

1 - 1 of 1

Click on the **Close Call ID** to open the event record.

Prior to accepting a Close Call, a RM would be required to reviewing the detail of Close Call (incl. attached photos and if the Close Call has been allocated to the correct project/division).

# Close Call Report Screen

With the introduction of Maximo 7.6, the overall look and feel of the Close Call Report Screen has changed. This includes the main tool bar which has been a significant refresh

## Old Look

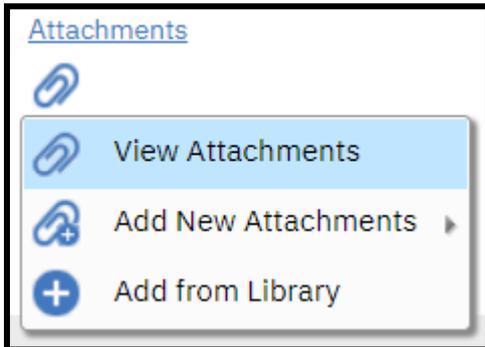


## New Look



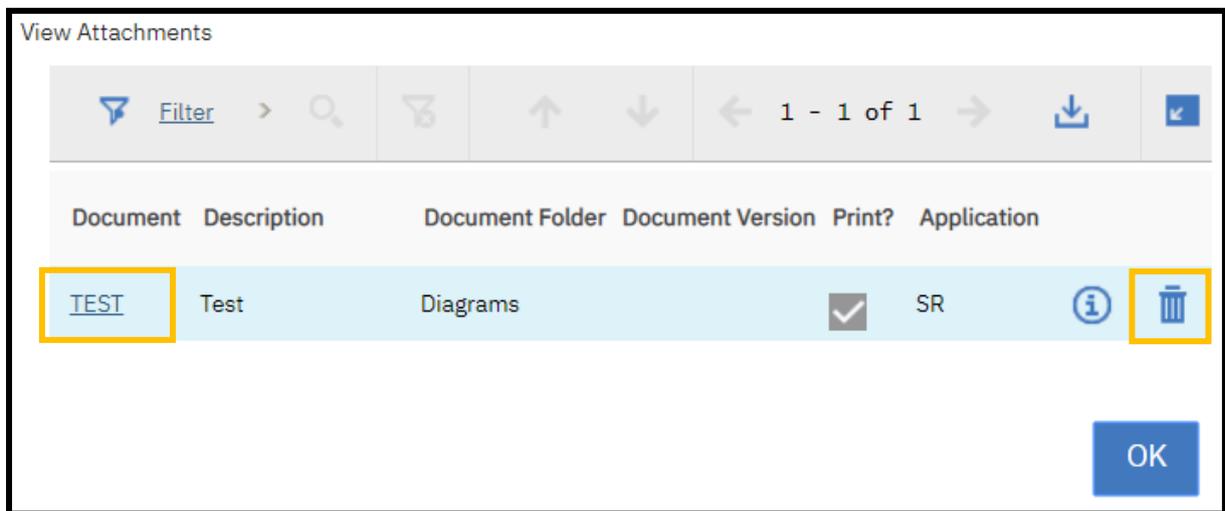
## Viewing Attachments

If the report of the Close Call has provided attachments, they can be reviewed by clicking onto the Attachment icon (highlighted above).



Select View Attachments

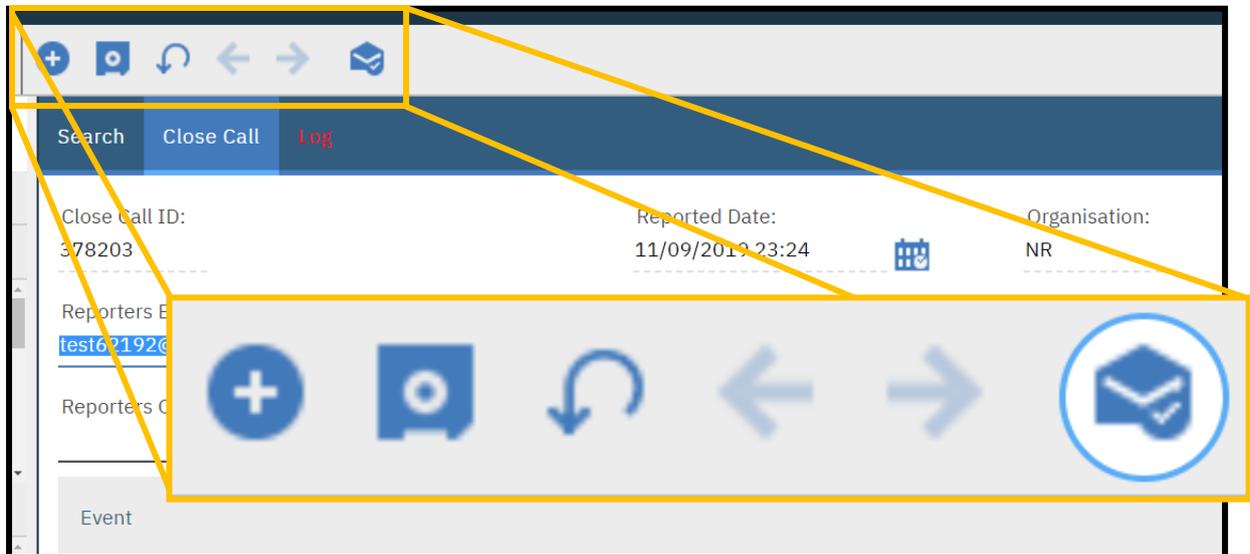
To view the attachment or go to the URL of the web page that was provided, click onto the blue text listed under the Document column.



**As a RM you have the ability to delete any attachments which may have been added to a report. Please be aware of this when reviewing attachments, as clicking the delete icon will remove the attachment from CCS.**

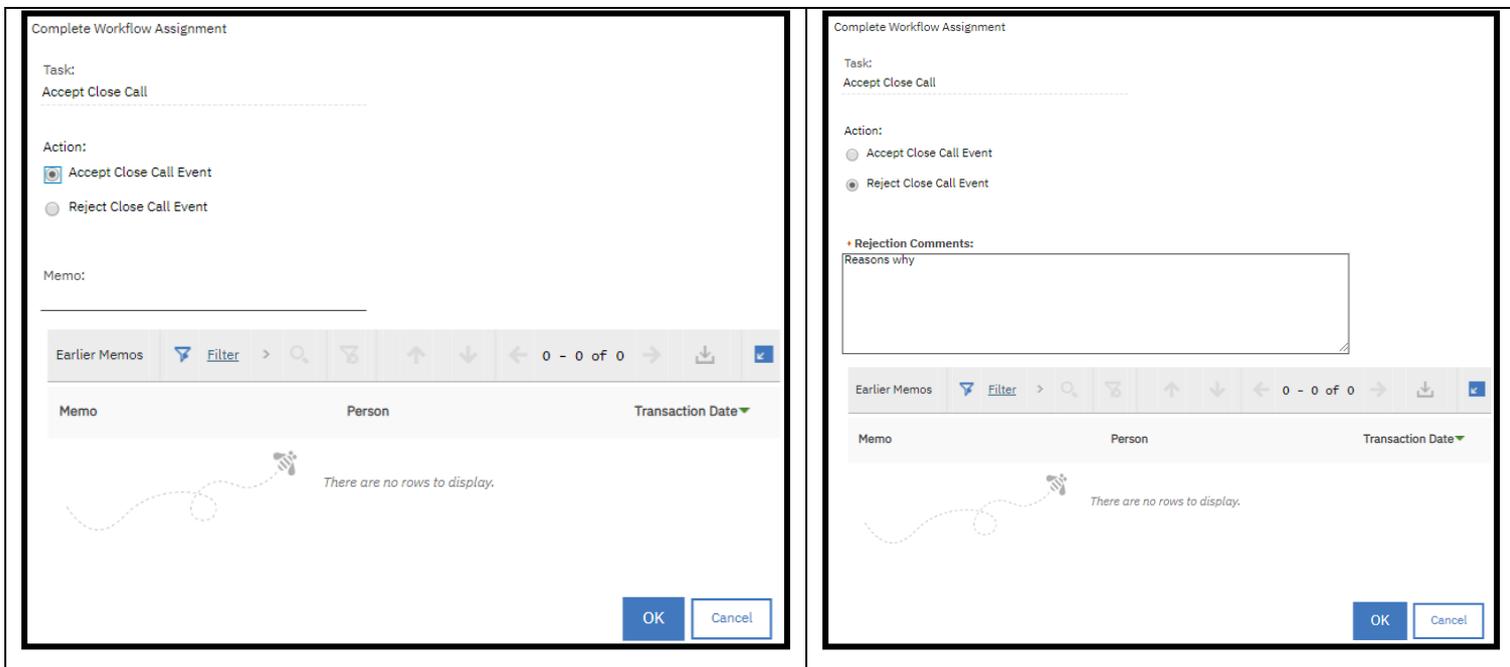
## Accepting or Rejecting the Close Call

Following your normal process an RM can either accept or reject a Close Call. This is done by clicking on the process icon on the top menu bar.



The *Complete Workflow Assignment* pop up window will appear, asking the RM to confirm if the close call event should be accepted or rejected. If accepted, click OK.

If the RM decides to reject the Close Call Event, they will be required to provide a reason(s) for rejection in the Rejection Comments box, prior to selecting OK.



An email notification will be sent to the user who processed this call onto the RM for review and completion based on the RM's comments.

Once okay has been selected you will be returned to the close call reporting screen.