

Close Call System (CCS)

User Guide



Version History

Version	Date Issued	Issued by	Changes Made
1.0	30 Nov 18	Adrian Jones	Initial Release
1.1	14 Jun 18	Adrian Jones	Amended login screen shots
2.0	18 Sep 19	Adrian Jones	Amending of all screen shots due to release of Maximo 7.6

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1. Close Call System (CCS)

The Close Call System was launched in June 2011 to enable the rail industry to record and manage conditions and behaviours that, under different circumstances, could have led to injury or harm.

This information is used to mitigate risk and understand broader safety issues. Initially used by Network Rail and its principal contractors there is now a wider impetus to use the system to drive improvements in safety culture and safety performance throughout the rail industry.

2. CCS Terminology

Term	Description							
Close Calls	A Close Call is defined as a recognised unsafe condition or act that could have resulted in personal injury or damage to railway infrastructure/property, but on this occasion, did not; however, next time the outcome could be different.							
	This includes the potential to:							
	 Harm a person including minor or major injuries and fatalities Harm the environment and/or protected species Damage railway infrastructure (including plant, vehicles and equipment) Breach information systems and/or security. 							
Faults	A fault is identified as a situation or condition within the railway infrastructure/property that that could cause immediate harm or damage.							
	This may include examples such as:							
	 Broken access gate Hypodermic needles left on an authorised walkway or lineside Trees or branches leaning dangerously close to operational lines 							
	Logging faults is separate to Close Call reporting and all faults must be referred to the relevant Route Control.							
	For example, if an access gate was found left opened, with its lock broken or missing, meaning that gate cannot be secured immediately, this must be reported as a fault through the relevant Route Control to be assigned an FMS reference so that the local maintenance response team can attend to resolve the issue or replace the lock.							
	The Close Call system cannot be used to log faults instead of notifying Route Control; however, behavioural elements associated with identified faults can be reported as Close Calls, provided that an FMS reference number is included in the report, as proof that the fault element has already been logged appropriately, and the reporter highlights that they are specifically raising a Behavioural Close Call.							
	For example: An access gate has been found left open with damage identified to the adjacent lineside fence. In addition, there is evidence of new equipment and materials having been delivered to lineside in advance of works. Whilst this should be reported as a fault so that the gate can be secured, and immediate repairs can be carried out to the lineside fence, a Close Call should also be raised, subsequently, to report the unsafe act committed by an unknown team which has recently accessed the area and must have known about the broken fence which							



	could have resulted in personal injury or damage to railway infrastructure/property.						
	For faults on Principal Contractor sites, please refer to local procedures or contact your local Health and Safety representatives.						
Incident/accident	An incident/accident is the occurrence of an event which has resulted in an injur accident or collision, involving a person (or several people).						
	This may include examples such as:						
	 Injury to head caused by equipment within a possession Person slipping on a wet walkway causing a knee injury Traffic collision whilst driving to a work site 						
	Accident/incident reporting must be completed through the normal agreed procedure according to your office/location. For all incidents/accidents occurring within a Network Rail office/workplace, an accident log must be completed (through the local H&S or Facilities Team). For Infrastructure Projects/Principal Contractor colleagues, please refer to your local procedures.						
	Reporting of an HSEA incident by a Principal Contractor can be done via the Route Services SCO 24:7 call centre, clearly stating that the report is for an HSEA incident, rather than a Close Call.						
	In no circumstances should Network Rail staff use the Close Call system to record an incident/accident.						
Operational Close Calls (formally	An Operational Close Call is an unplanned and/or uncontrolled event which occurs on the operational railway and has the potential to cause damage, loss or injury to persons, plant, equipment, property or infrastructure.						
Irregular Working)	Examples of Operational Close Calls include:						
	Earthing equipment not removed						
	 Inadequate protection/safe system of work Moved outside protection limits without authority 						
	Equipment falling onto a running line						
	Trolley/vehicle runaway						
	Reporting of Operational Close Call must be made through relevant Route Control Centre or with the COSS/PICOP of the possession work involved with the Operational Close Call.						
Near Miss	An unplanned and/or uncontrolled event involving a train or rail-mounted plant which has the potential to cause personal injury. A Near Miss is an outcome of an Operational Close Call.						



3. Close Call Report Statuses

Code	Status
Open	Open
W-RM	Waiting Responsible Manager
R-MR	Responsible Manager Reject
R-MA	Responsible Manager Accept
Closed	Closed

Status Transitions

From Status	New Status	Process Description
Open W-RM W-RM R-MR		The user selects on the option Report New Closed Call. This opens a new Close Call Event with status OPEN. These will appear in the Control Centre operative start centre portlet to process. Once the relevant fields have been populated and Responsible Manager populated the Control Centre operative can progress the Close Call.
		The status of the Closed Call will be W-RM: Waiting Responsible Manager The Closed Call will appear on the Responsible Manager Start Centre portlet indicating these needs further action. A Responsible Manager in the corresponding security group will then review the Closed call and Accept / Reject the Close Call. If the Closed Call is rejected the Responsible Manager must provide a reason prior to progressing the Close Call. The status of the Closed Call will be R-MR: Responsible Manager Reject
W-RM	R-MA	The Closed Call will appear on the Responsible Manager Start Centre portlet indicating this requires further action. A Responsible Manager in the corresponding security group will then review the Closed call and Accept / Reject the incident. If the Closed Call is accepted the status of the Closed Call will be R-MA: Responsible Manager Accept
R-MA	W-AM	If the Responsible Manager is satisfied that all the actions have been completed and / or the risk have been contained they can close the Closed Call Ticket. The status of the Closed Call will be CLOSED.



4. User Account & Logging in

Registering to be a Close Call User

You can register to become a close call user from the sign in screen. This will send an email to your Organisation Administrator, who will set you up with a username and password to access the system.

Click on the Register Now hyperlink on the log in screen

THE ATHLE	SALE WITH THE	e to Close Class Asset & Safety Manager	1
	User Name:		
	Password:		
	Sign In	Forgot Password? New User? Register Now Mobile Login	

Find your Organisation by clicking on the spy glass next to the Organisation field.

+ Organisation:	0	
process and cor	ot listed, please Exit the Self Registratio act the Rail Safety Standards Board.	
Contact Information for r the	gistering a new Organisation is available lose Call Log On Screen	from

The organisations are listed in alphabetical order



Se	lect Value											
	Filter >	0			≁		1 -	20	of 192	→	⊻	e
	Organisation	Descri	iption *							Sys	stem	
	AMBES	A Mckie Building & Engineering Servives Ltd CLOSECAL										
	APWEBB	A P Webb Plant Hire Ltd CLOSECAL										
	AARAIL	<u>AA Rai</u>	il							CLO	DSECAL	

Scroll through the Organisation names using the blue arrows

Se	elect Value											
	Filter	>	0		$\mathbf{\Psi}$	~	1 -	20	of 192	→	₩.	ĸ
	Organisation		Desci	rintion						s	vstem	

Type part of your company name in the **Description** field and press return to narrow down search

Select Value			
Filter	> 🔍 😼 🛧 🔸 ← 1 - 3 of 3 →	<u>v</u> –	
Organisation	Description -	System	
	Balfour		
BBCIVENG	Balfour Beatty Civil Engineering Ltd	CLOSECAL	
BBENGSRV	Balfour Beatty Engineering Services Ltd	CLOSECAL	
BBRAIL	Balfour Beatty Rail Ltd	<u>CLOSECAL</u>	
		Cancel	

Enter your details in the fields provided – all fields are mandatory to complete the registration.



Details		×				
Welcome to user registration. Please complete the information below to gain access to the system. You will be notified by e-mail when your registration has been processed.						
User Information						
If your Org proc	ganisation is not listed, please Exit the Self Registratio cess and contact the Rail Safety Standards Board. mation for registering a new Organisation is available the Close Call Log On Screen					
+ First Name:						
+Last Name:						
+ Contact Number:						
+ E-Mail:						
+ Confirm E-Mail:						
+ Password:						
+ Confirm Password:						
+ Password Hint Question:	Q					
+ Answer:						
+ Requested User Type:	Q					
+ Function/Department/Delivery Unit etc:						
		Submit Exit				

Password Hint Question: You can pick a hint question by clicking on the spy glass. This question and answer will be used to verify your identity if you forget your password.

Requested User Type: You must request a user type by clicking on the spy glass and selecting from the list. If you require responsible manager access, you should select 'Responsible Manager' and for user access, you should select 'user'.

Function/Department/Delivery Unit etc: By informing the Organisation Administrator which function, department or delivery unit you work in, it will allow them to set you up in the correct division within the organisation structure in the system.

Click the **Submit** button.

This will send notification to your Organisation Administrator, who will verify the information and provide you with access to the system.



OK

After clicking Submit you will receive a pop-up message to confirm that your user request is being processed.

You will be sent two emails. The first email will be sent to confirm that your details have been sent to the Organisation Administrator.

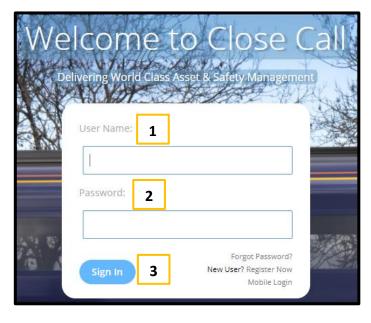
The second email will be sent to

inform you of your log in details once the Organisation Administrator has processed your request.

System Message

i

Logging In



Once the Organisation Administrator has approved your request you can login.

1. Enter your username

BMXAA3831I - Thank you! Your registration is

mail if we require more information or when your

being processed. You will be contacted via e-

registration is complete.

- 2. Enter your password
- 3. Finally, select Sign in

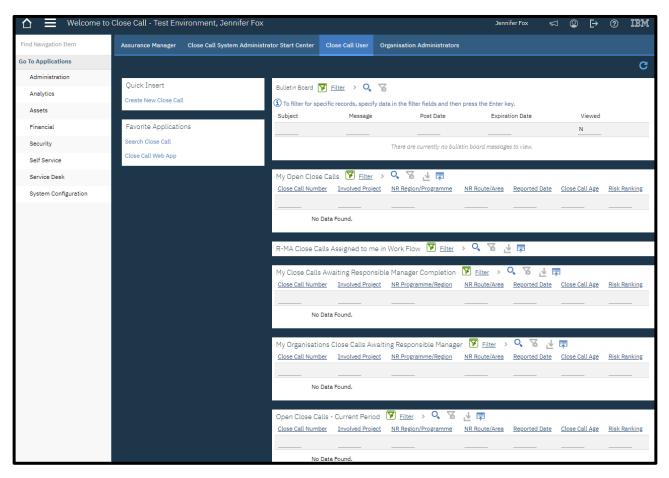
Be aware – your password will be case sensitive.



Start Centre Overview

Introduction

When logging into the Close Call System (CCS) you will be taken to your start centre.



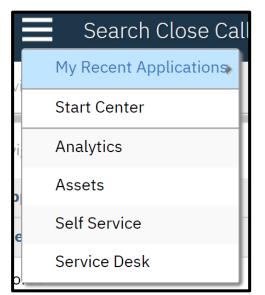
Displayed at the top of the screen will be the main tool bar - which will be available on every screen in CCS.



Each icon has a specific task, outlined below.

lcon	Function	lcon	Function
\triangle	Return to the Start Center		Access CCS' Main Menu
\square	Access the announcements on the Bulletin Board	0	Access and Amend your Profile
E⇒	Logout of CCS	?	A link to the Help available via the RSSB Industry System's Service Desk.

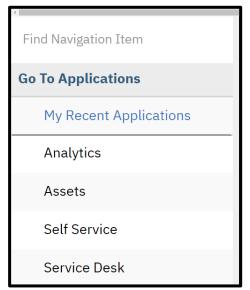




In addition to the main menu, a navigation panel is available on the left-hand side of the screen.

The options available will change depending on which page a user has accessed. The example shows the options available when a user is navigating the Start Center.

As stated above, the main tool bar will appear on every screen on CCS, therefore, the main menu will be available for use.



If at any point you wish the navigation panel to be hidden from view, run your mouse over the navigation panel and a blue box, with white arrow, will appear. Clicking on this box will prompt the panel to slide out of view.

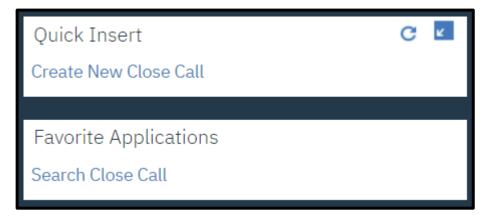


To show the navigation panel again, click onto the blue box (with white arrow) again and the panel will slide into view.





The start centre contains a link to create a close call event and to search safety events.



If you have Organisation Administrator permissions, you will have an additional tab in your start centre which contains the functionality required to perform your administrator tasks.



Start Centre Portlets

The information contained in the 8 portlets is bespoke to you and will show you events relevant to your organisation, based on the project/division level of the organisation hierarchy that your user profile is assigned to and any projects/divisions that sit below you in the hierarchy.

Bulletin Board

Bulletin Board 🍸	Filter > 🔍 🚡			
(i) To filter for spec	ific records, specify data in th	e filter fields and then press	the Enter key.	
Subject	Message	Post Date	Expiration Date	Viewed
				Ν

Messages for you will appear in the bulletin board section.

My Open Close Calls

My Open Close (Calls 🔽 <u>Filter</u>	> 🗸 🖉 👎 🛙				
<u>Close Call Number</u>	Involved Project	NR Region/Programme	<u>NR Route/Area</u>	Reported Date	<u>Close Call Age</u>	<u>Risk Ranking</u>
377821	TEST DIVISION 1	NOT APPLICABLE		11/07/2019 09:24	0-7 DAYS	LOW
Chart View						1 - 1 of 1

If you have created and saved, but not yet processed, a close call event it will remain in the start centre. There are columns to show the age of the close call event and the event risk ranking. The information is shown in List View by default but can be viewed in Graphical View. The information is colour coded as follows –



- Green Less than 7 days old
- Amber 7 to 14 days old
- Red 15+ days old

My Close Calls Awaiting Responsible Manager Completion

My Close Calls A	waiting Respons	sible Manager Compl	letion 🔽 <u>Fil</u>	_{ter} > 🔍 🔏	⊉ 🛱	
Close Call Number	Involved Project	NR Programme/Region	NR Route/Area	Reported Date	<u>Close Call Age</u>	<u>Risk Ranking</u>
377821	TEST DIVISION 1	NOT APPLICABLE		11/07/2019 09:24	0-7 DAYS	LOW
Chart View						1 - 1 of 1

Users whose close call events are awaiting Responsible Manager (RM) review will see the events in this portlet until the RM has processed them. This portlet includes the same columns of information contained in 'My Open Close Calls' (portlet 2). The same colour coding will be applied based on the age of the event. The information is shown in List View by default but can be viewed in Graphical View.

My Organisations Close Calls Awaiting Responsible Managers Completion

My Organisation	s Close Calls Aw	aiting Responsible M	lanager 🍞	Filter > 🔍 🦹	š ⊉ 🛱	
Close Call Number	Involved Project	NR Programme/Region	NR Route/Area	Reported Date	<u>Close Call Age</u>	Risk Ranking
377821	TEST DIVISION 1	NOT APPLICABLE		11/07/2019 09:24	0-7 DAYS	LOW
						1 - 1 of 1

All events assigned to the user's project/division level and below, will appear in this portlet. The same colour coding as above will be applied to the events listed.

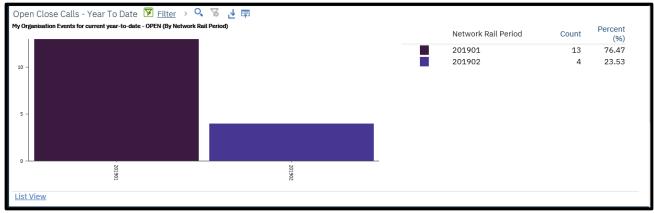
Open Close Calls – Current Period *

Open Close Calls	- Current Period	🍸 <u>Filter</u> > 🔍 🔞 🚽 🛱			
Close Call Number	Involved Project	NR Region/Programme NR Route/Are	a <u>Reported Date</u>	<u>Close Call Age</u>	<u>Risk Ranking</u>
378098	NR_TRAINING	NOT APPLICABLE	03/09/2019 12:45	0-7 DAYS	LOW
378044	NR_TRAINING	NOT APPLICABLE	14/08/2019 16:08	15+ DAYS	HIGH
378086	NR_TRAINING	NOT APPLICABLE	30/08/2019 12:24	0-7 DAYS	HIGH
378099	NR_TRAINING	NOT APPLICABLE	03/09/2019 13:07	0-7 DAYS	HIGH
Chart View					1 - 4 of

This shows any close call events with a status of OPEN or W-RM within this financial period. The list view is shown by default, with the same colour coding as above. The information can be switched to Graphical View showing the close calls split by risk.

Open Close Calls – Year to Date *





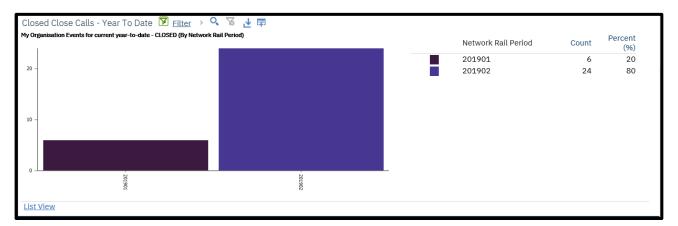
This information is shown as a graph by default, showing the close calls split by NR period. This can be viewed as a list as well. When List View is selected, the same columns in the same order with the same colour coding will be shown, as per portlet 2.

Closed Close Calls – Current Period *

Closed Close Calls	- Current Perioc	🍞 <u>Filter</u> > 🔍 '	12 T 🖬 🖄			G R
<u>Close Call Number</u>	Involved Project	NR Region/Programme	NR Route/Area	Reported Date	<u>Close Call Age</u>	Risk Ranking
378068	ANDREA	NOT APPLICABLE		29/08/2019 14:19	0-7 DAYS	HIGH
378022	NR_TRAINING	NOT APPLICABLE		12/08/2019 14:37	0-7 DAYS	LOW
378023	NR_TRAINING	NOT APPLICABLE		12/08/2019 14:59	0-7 DAYS	HIGH
378032	NR_TRAINING	NOT APPLICABLE		14/08/2019 13:39	0-7 DAYS	HIGH
378035	NR_TRAINING	NOT APPLICABLE		14/08/2019 15:13	0-7 DAYS	HIGH
378036	NR_TRAINING	NOT APPLICABLE		14/08/2019 15:34	0-7 DAYS	HIGH
378037	NR_TRAINING	NOT APPLICABLE		14/08/2019 15:36	0-7 DAYS	LOW
378043	NR_TRAINING	NOT APPLICABLE		14/08/2019 16:02	0-7 DAYS	LOW
378042	NR_TRAINING	NOT APPLICABLE		14/08/2019 16:01	0-7 DAYS	LOW
378065	NR_TRAINING	NOT APPLICABLE		29/08/2019 13:50	0-7 DAYS	LOW
<u>Chart View</u> 1-10 of 24 Next Page >>						

This includes close call events with a status of CLOSED within this financial period. This portlet includes the same columns in the same order as portlet 2. The list view is shown by default, but the information can be switched to Graphical View showing the close calls split by risk ranking.

Closed Close Calls – Year to Date *





This includes close call events with a status of CLOSED year to date. This information is shown in Graphical View by default, showing the close calls split by Network Rail period. When List View is selected, the same columns in the same order will be shown, as portlet 2.

* The event lists and chart data will only show data relevant to the users' data-entry level and lower in their user profile.



5. Reporting a Close Call

Using Close Call to Report

Creating a Close Call

The close call record is mainly made up of drop-down lists and selection boxes; however, there are some free text fields that allow you to explain in detail the close call event you are reporting. Some fields are mandatory to capture consistent information for the purposes of analysis; others are optional and allow the user to enter more information if they wish.

Click on 'Create New Close Call' within the Start Centre.

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()		IC	k.	11	ns	e	rt.	
\sim	u.		N 1	-		\sim		

Create New Close Call

The Close Call Event Screen

The top boxes of the close call record are read only, and include details such as a unique Close Call ID, the 'Reported Date', which is the date the call is entered into CCS, the organisation and user details etc.

There is also a field indicating the status of the report, which will indicate if the event is open, closed or if it has been processed for Responsible Manager (RM) review. For more information on status click <u>here</u>

Status: OPEN O
Attachments

Fields marked with an * are mandatory and <u>must</u> be completed before an event can be processed.

* Describe the Close Call event and what could have happened:



Event Description

The event section consists of free text fields for the Close Call event description and what was done about it. The text format can be altered by using the icons provided.

Event	
+ Describe the Close Call event and what could have happened:	
• ∩ • □ ■ I □ ⊕ I □ ⊕ I ■ I □ ⊕ I □ ⊕ I	
What were you able to do about it:	
Responsible Manager / Department:	//

There are two checkboxes to be ticked if the close call report was the of a safety conversation, or if the report came following a workplace safety inspection.

Are you reporting this as	Was the Close Call logged as a result
a result of a Safety Conversation?	of a workplace safety inspection?

Organisation Detail

Organisation Detail		۲
+ Event Date:		
+ Involved Division / Project:	_>	
Reporter Division / Project:	>	
NR Project Name:		
NR Region/Programme:		
NR Route/Area:		
NR Delivery Unit:		
NR Local Operations Manager:		
NR Function:		

This section of the Close Call record is used to specify the date and time the event occurred and the 'Project' that it occurred on. You will only can select projects that sit at the level or lower in the organisation hierarchy, which is set on your user profile.

Once the project has been selected, the relevant NR Region/Programme, Route/Area, Delivery Unit etc. will auto-populate with the information held in the system for that project. This information is used for reporting purposes.



Date and Time of the event

Organisation Detail	
+ Event Date:	

Enter the date and time that the event occurred using the calendar icon.

You can navigate to the correct date by using the left and right arrows next to the month or click

+ Event Date:	
	iiii

on the month itself to view a drop-down list.

Select the day within the calendar. Use the arrows at the top and bottom of the time bar to scroll to the correct time the event occurred.

+ Ever	nt Dat	e:		Ē	ė			
←			July	•		>	18:30	•
М	т	W	Т	F	S	S	18:45	
1	2	3	4	5	6	7	19:00	
8	2	10	11	12	13	14	19:15	
							19:30	
15	16	17	18	19	20	21	19:45	
22	23	24	25	26	27	28	20:00	
29	30	31	1	2	3	4	20:15	
							20:30	11
5	6	7	8	9	10	11	20:45	
	201	8	2019	2	020		21:00	
	-10	Cano	el	ОК				

Involved Project

To assign the close call against a project, click on the > icon next to the mandatory **'Involved Project'** field, you will have **two** methods to view the organisation's projects in which to assign to the Close Call record. **'Open Drilldown'** is the recommended method when finding and selecting the project.

Involved Division / Project:		
	>	
Reporter Division / Project:	탙	Open Drilldown
	P	Go To Organisation Structures
	<u> </u>	-

'Open Drilldown' will open the organisation structure in a hierarchical view and is the easiest way to select the organisation level.



Drilldown			
Select > to show children	en. Select \checkmark to hide children. Select \mathscr{P} to return location / asset.		
Organisation Structure			
Location: NR_TRAINING	NR Training Division (Training purposes)	Status:	Site: NR O
System NR Show All Systems Show Path to Top	 PNR_TRAINING:NR Training Division (Training purposes) ANDREA:Andrea AREA DIRECTOR X:Area Director X AREA DIRECTOR Z:Area Director X DEPARTMENT E:Department E DEPARTMENT F:Department F DIVISION G:Division G DIVISION H:Division H NEW DIVISION TEST:New Division Test NORTHERN RAIL:Northern Rail Trial 		
			Cancel

To select the appropriate level of organisation or project involved in the close call, click on the blue arrow (>) to the left of the project name to expand a section and select the link icon



• NR_TRAINING:NR Training Division (Training purposes) • ANDREA:Andrea
AREA DIRECTOR X: Area Director X
👽 🖉 AREA DIRECTOR Z:Area Director X
DELIVERY UNIT B:Delivery Unit B
DEPARTMENT E:Department E
DEPARTMENT F:Department F
P DIVISION G:Division G
P DIVISION H:Division H
NEW DIVISION TEST New Division Test

The project information will populate the relevant fields.



Involved Division / Project: NR_TRAINING	> NR Training Division (Training purposes)	
Reporter Division / Project:		
	>	
NR Project Name: NON PROJECT/CONSTRUCTION ACTIVIT	ΓΥ	
NR Region/Programme: NOT APPLICABLE		
NR Route/Area:		
NR Delivery Unit:		
NR Local Operations Manager:		
NR Function:		
NON PROJECT/CONSTRUCTION ACTIVIT NR Region/Programme: NOT APPLICABLE NR Route/Area: NR Delivery Unit: NR Local Operations Manager:	ΓΥ	

Category and Causes

There are many categories available to classify the close call event. To open the list of Categories, click on > and select **'Classify'**

The list of categories and subcategories are merged into one list. Expand each category by clicking on the > to the left of the category name, and then select the most appropriate sub-category by clicking on the link icon next to the subcategory text.

Category and Causes	Ľ	
Please select a Category with What Could Have Hap	peneo	ł
+ Category:		
	>	
Sub Category:	E	Classify
	×	Clear Classification
Primary Cause Incident Factors:	_	
	0	
Level 2 Incident Factors:		
	0	
Environmental Contributing Factors:		
	0	
	-	



Classify
 CONFINED SPACES:Confined Spaces STATIONS/BUILDINGS:Stations/buildings TEMPORARY STRUCTURE/CONTAINMENT:Temporary structure/containment TUNNELS:Tunnels UNAUTHORISED ACCESS:Unauthorised access UNCOVERED/UNSAFE CATCHPITS:Uncovered/unsafe catchpits UNCOVERED/UNSAFE DRAINS:Uncovered/unsafe drains
 CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES:Control of Chemicals/Hazardou DESIGN: ECOLOGY (PLANT & ANIMALS):Ecology (plant & animals) ELECTRICAL SAFETY:Electrical Safety
Cancel

If selecting the Category **'Other'**, an additional text box will appear for you to describe the category you are entering.

Category and Causes
Please select a Category with What Could Have Happened
+ Category: OTHER >
Sub Category:
Other O
+ Describe the category:

Complete the remaining optional fields (Primary Causes Incident Factors, Level 2 Incident Factors and Environmental Contributing Factors) by clicking on the spy glass and selecting from the list of options



Category and Causes	¥.
Please select a Category with What Could Have Hap	pened
+ Category: CONFINED SPACES \ TUNNELS	>
Sub Category: Tunnels	0
Primary Cause Incident Factors: EQUIPMENT	0,
Level 2 Incident Factors: STORAGE	0,
Environmental Contributing Factors:	0

Risk Matrix

The Risk Matrix fields are mandatory for the close call inputter to determine the level of risk from an accident probability and potential consequence point of view. There is a High, Medium, Low and Negligible option for each field. Click on the spy glass and select a level of risk for Accident Probability and Potential Accident Consequence of the close call event.

Accident Probability: What is the probability of an accident taking place high, medium, low or negligible.

Potential Accident Consequence: Would the outcome/consequence if an accident had occurred be high, medium, low or negligible.

Risk Matrix	×	
+ Accident Probability:	0	
+ Potential Accident Consequence:	O,	
Risk ranking:		

Based on the rankings entered in each field, the risk ranking will be auto-populated.



Risk Matrix		۷
+ Accident Probability: MEDIUM	Q	
+ Potential Accident Consequence: HIGH	Q	
Risk ranking: HIGH		

If the risk ranking is high, the close call must be processed to a Responsible Manager (RM) to review before the event can be closed.

Other Detail

Additional data is required in the **'Other Detail'** section. Click on the spy glass next to each field for a list of options to pick from.

Other Detail	۲
Asset Type: TRACK/P-WAY	0
+ Trackside or Non Trackside: TRACKSIDE	O,
+ Trackside / Non Trackside Location: FOOTPATH	0.
Other Location Info (ELR/Mileage etc):	
Other involved Organisation/s:	
//	
+ Can the event be closed at source:	
NO O	
Required Actions:	



Can the event be closed at source?

This field requires the person creating the close call to indicate if the close call has been dealt with and therefore can be changed to 'CLOSED' status, or if there are still outstanding actions to correct the safety issue.

+ Can the	event be closed at source:
NO	0

The field states 'No' by default however it can be changed to 'Yes' if no further action is required. By marking it 'No' the close call record will be sent to the Responsible Manager for review and allow them to enter follow up actions which may be required to close the record.

Additional Detail Tab

The bottom sections of the Close Call Event are all optional. The fields may be used to log information about the person reporting the close call.

Additional Information		Ľ
Lone worker?	Reported by:	If applicable, which Network Rail Control has this been reported to
Was the Event Outdoors:	Close Call Age: 0-7 DAYS	

Reported by: Click on the spy glass and pick from the appropriate value in the list.

Se	lect Value	
	Filter > Q V A	↓ ← 1 - 3 of 3 ⇒ ⊥
	Value	Description
	<u>I</u>	
	MANAGER	Manager
	OPERATIVE	<u>Operative</u>
	PUBLIC	<u>General Public</u>
		Cancel



Organisation Specific Detail Tab

These fields may be used to input details of the person reporting the close call and enable them to receive feedback.

Organisation Specific Detail	2
Reporters name:	Actions required:
Reporter's contact details:	
Person responsible for providing feedback:	Date scheduled for completion:
SMS Text Address:	Date completed:

If the reporter of the close call would like to receive text messages relating to the progress of the close call event, their name and a valid mobile telephone number must be entered into the 'Reporter's contact details' box.

The reporter can enter the actions that they think are required into the **'Actions required'** box and use the date fields if required.

If you are a Responsible Manager, there will be an additional tab in the close call event which you are required to complete. Please see Guidance Note '<u>Reviewing a Close Call | Responsible Manager</u> for details on how to complete the Responsible Manager section.

Life Saving Rules

Life Saving Rules Details
Potential breach of Life Saving Rule?:
Working with moving equipment - exclusion zone
Required plans and permits in place
Working with electricity - test before applying earths
Working with electricity - test before touch
Driving - always wear a seatbelt
Driving - using handheld device whilst driving
Working at height - without a harness
Equipment fit for intended purpose
Taking responsibility - influence of drugs/alcohol
Taking responsibility - trained/assessed as competent/right equipment

The Life Saving Rules are a Network Rail initiative to ensure everyone takes personal responsibility for maintaining safe behaviour. Go to <u>here</u> for further information.

The Life Saving Rules tab in the close call event is mandatory and <u>must</u> be completed.

Potential breach of Life Saving Rule? Must be marked as either 'Yes', 'No' or 'Potential Breach'

If it is marked that a lifesaving rule has been breached, the relevant tick box should be selected.

If you are a Responsible Manager, please see Guidance Note 'Responsible Manager – Processing & Completing Close Calls' for details on how to complete the Responsible Manager section.



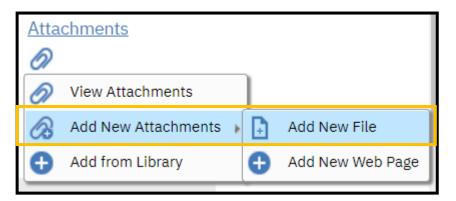
Adding Attachments

As part of the close call reporting, it is possible to add attachments such as photos or documents directly to the report.

To add a new attachment, click onto the attachments link

Selecting Add New Attachments and select Add New File (to upload from own device) or Add a New Web Page, which will link to an external web page.



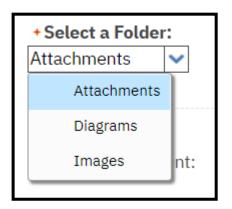


To add a new File, select Add New File. A Create a File Attachment popup will appear.

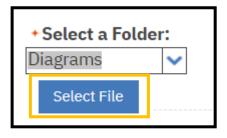
Create a File Attachment
 Only files with the following formats can be enabled for printing: .pdf, .xls, .csv, .txt, .doc, .gif, .jpg, .ppt. Clear the check box beside the Print attached document with report if printable type option (Advanced Option) if the file being attached is not in one of these formats.
Name the document:
Advanced Options
Copy document to the default location set by your administrator (recommended)?
Print attached document with report if printable type?
OK Cancel

You will then need to specify what type of attachment you are attending. This could be diagrams, photos of the close call that is being reported or word documents, excel files, etc.





Once you have selected the type of attachment you are uploading, you will need to upload the file from your device. Selecting the Choose file button will display the standard windows explorer view.



Once you selected which files you would like to upload, you will need to provide a name and description of the file.

Name the document:

Adding a link to a Web page

From Add New Attachments, select Add New Web Page.

The Create a URL Attachment popup will appear.

As per the adding of an attachment, select a folder and give a name and description. Rather than uploading a file, you specify the URL for the web page you will link to.



Create a URL Attachment		
Select a Folder: Attachments Specify the URL:		
Name the document:		
Advanced Options		Z
Print attached document with report if printable type?		
	ОК	Cancel



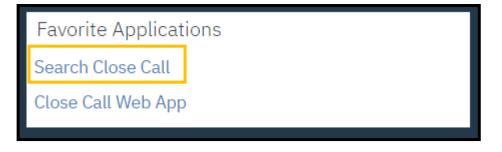
Editing a Close Call

Introduction

When a close call event has been entered and processed the status of the event will appear as Closed. However, it is possible to re-open a closed event and edit fields within the event that may require changing.

Editing a Close Call Event

To find the event you want to amend, click on 'Search Close Call' (see 'Searching & Running Reports guidance for further information in conducting a search in the Close Call System).



Reopening a Closed Event

Note: if a user reopens a closed event – this will have directly implications on the original closed date which will affect reporting of closed event figures.

If the event is marked as 'Closed', you must reopen the event to edit the content.

Click on the 'Process Close C	Call' icon at the top of the e	vent screen.	\mathbf{N}		
✓ O □ 0 ← → Q					
← List View Close Call Log					
Close Call ID: 377789	Reported Date: 10/07/2019 11:22	Organisation: NR		Status: CLOSED	Q

Click 'OK' to confirm you want to re-open the event

Manual Input	
Re-Open this Close Call Event?	
Memo:	
ок	Cancel



Confirmation that the event status is now updated to 'Open' will appear. Click 'Close' to begin editing the event.

Manual Input		
Close Call was Re-opened.		
Memo:		
	ОК	Cancel
	UK	Cancel

Editing the Close Call Event

The event will now be fully editable. You can edit the text fields, change the drop-down options previously selected, alter the date and time the event occurred, assign the event to a different project from your organisations project list, add attachments to the event etc.

Closing the edited event

To change the event back to 'Closed' status, click on the '**Process Close Call'** icon from the menu bar at the top of the event. You will be asked to confirm the event can be closed. Click 'OK' to confirm.



Manual Input					
Close this Close Call Event					
Cancel the Close Call Event					
Memo:					
	ОК	Cancel			



Bulk Upload

Introduction

Some organisations will already have a system in which to record 'close call' data, so to avoid duplication of effort, a spreadsheet can be populated with data from the organisations existing database. This data can then be bulk uploaded into the CCS. There are checks in place to confirm the data is compatible with the CCS before the information is uploaded, this ensures the upload is successful.

Some projects where Network Rail act as the Principal contractor also choose to bulk upload data using this method.

Completing Bulk Upload Spreadsheet

You must obtain a blank bulk upload spreadsheet each time you want to bulk upload events into CCS. Please visit the <u>RSSB Service Desk to download a new spreadsheet</u>. This will ensure the blank copy you receive is the latest version of the document.

Creating the bulk upload file

To successfully upload your data, ensure the **'Required Data'** fields in the spreadsheet are completed correctly. These reflect the mandatory fields that must be completed within a close call record and if there is data missing from any of these mandatory fields in the spreadsheet the upload will fail.

Columns B to K are all mandatory fields (with the exception of column I which is only mandatory if 'Other' is selected from the Category list in column H).

	А	В	С	D	E	F	G	
1	Course 1						REQUIRED DA	TA
	Convert	Close Call ID			Describe the Event and What Could		0.10	
2		(Unique)	Event Date	Involved Project	have happened	What were you able to do about it	Risk Ranking	
3		JF006	02/10/2012	JFMAIN	Heras Fence panels with sharp edges	The old panels were replaced with new ones and all o	t LOW	OTHER
4		JF007	03/10/2012	JFMAIN	Alexandra Palace - overgrown entrance	Vegetation cut back	LOW	CONTROL OF CHEMICALS
5		JF008	04/10/2012		Huntingdon - pallets in turning area, e	Now deliver to Peterborough instead	LOW	CONTROL OF CHEMICALS
6		JF009	05/10/2012	N.ELECTRICAL	Puddle of water on kitchen floor	Service party called out and leak repaired	LOW	CONFINED SPACES
7		JF010	06/10/2012	S.ELECTRICAL	Protruding Scaffold pole.	The protuding pole was removed, the tarpaulin was rol	LOW	CONTROL OF CHEMICALS
8								
9								

The end of the mandatory field columns is marked with a red line. All columns after this red line is optional data.

REQUIRED DATA					
Risk Ranking	Category	Reason if 'Other' is used in Category Field	Reported By (Close Call Log-in ID)	Organisation	Asset Type
LOW	▼ THER	Heras Fence panels with sharp edges.	tommy@jfrail.co.uk	JFRAIL	BUILDINGS & STRUCTU
LOW	CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ CHEMICAL SPILL		tommy@jfrail.co.uk	JFRAIL	FRACK/P-WAY
LOW	CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES		tommy@jfrail.co.uk	JFRAIL	SWITCHINGS & CROSS
LOW	CONFINED SPACES		tommy@jfrail.co.uk	JFRAIL	FRACK/P-WAY
LOW	CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ WRONG METHOD OF US	SE/APPLICATION	tommy@jfrail.co.uk	JFRAIL	SWITCHINGS & CROSS

Some fields are free text and must have data input, others are pick list fields. When downloading data from your current database, ensure the fields match the format of the Close Call System spreadsheet.



F		G	Н	
	F	REQUIRED DA	ΤΔ	
What were you able to o	do about it	Risk Ranking	Category	R
Put boarding over with cones to b	arracade the area un	HIGH		<u> </u>
Free text	Pick li	st	CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ CHEMICAL STORAGE CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ WRONG METHOD OF USE/APPLICATION CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ CHEMICAL SPILL CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ GASES/INHALATION CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ LIQUIDS/ABSORPTION CONTROL OF CHEMICALS/HAZARDOUS SUBSTANCES \ LIQUIDS/ABSORPTION CONFINED SPACES	
			CONFINED SPACES \TUNNELS	Ŧ

<u>Always</u> save your spreadsheet before converting the data to ensure you can easily re-open the spreadsheet and amend any fields if required.

Populating the 'Involved Project' column (column D)

It is important that the 'Involved Project' column in the bulk upload spreadsheet is entered with the project code written in CCS.

Converting Data

Once you have populated at least all the mandatory fields in the Bulk Upload spreadsheet you are ready to 'Convert' that data.

	A							
1								
	Convert							
2								

Converting the data is the first step in the process of checking that the information to be uploaded into CCS is compatible. For example, there are no missing mandatory fields; the date format is correct etc. If successful, the spreadsheet will be converted to a .txt file format which is the correct format for the data to successfully load into the Close Call System.

Data Error Message

If there is any discrepancy in the data within the spreadsheet a pop-up error message will appear which will guide you to the fields that need amending. For example, if any of the mandatory fields are empty.

ſ	Microsoft Excel
	Warning - File preparation cannot continue owing to the following errors: Required field - Risk Ranking is not populated at line 4 Required field - Reason for Other in Category is not populated at line 4
	ОК

Please be aware entires on the Bulk Upload Spreadsheet are poplated from line 3, this will need to be taken into consideration when correct errors.

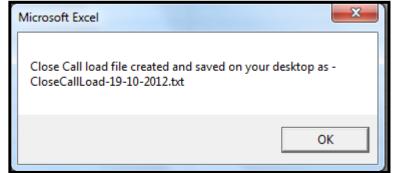
Click 'OK' and return to your saved spreadsheet and complete/change the fields accordingly.



Successful Data Conversion

If the data entered is correct, the following message will appear, informing you that a copy of the spreadsheet has been saved to your computer desktop (as a .txt file). The file name is specified to find the file easily.

Click **'OK'**.



Check your desktop to ensure the converted spreadsheet has been successfully saved. DO NOT OPEN THE FILE.

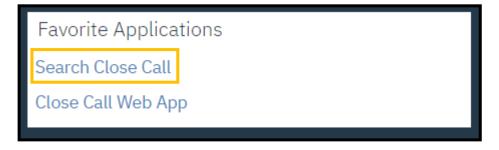
The file will show on your desktop.

Uploading the data in 'preview' mode

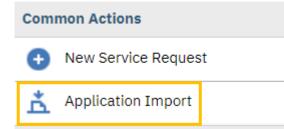


Now that your spreadsheet has been converted, you are ready to preview the data to validate the content of the file. This must be done before uploading the data into the Close Call System to ensure the upload will be successful.

The system does a final check of the data to ensure that the information being uploaded is compatible with the system. Although the spreadsheet may have successfully converted, there may still be problems with the spreadsheet data that will prevent the upload from being successful. To begin the uploading process, log into the Close Call System and click on 'Search Close Call'.



Click on the **'Application Import'** icon on the top menu bar.



Application Import allows you to select the .txt data file that was saved on your desktop and upload the data.



Application Import	
Object Structure:	Import limit:
Operation:	
Sync Q	
Import Configuration	
Import Preview? Select File	OK Cancel

To upload select the maginfying glass next to Object Stucture and select either 'Non-Network Rail Users bulk upload' to upload the text file (from the spreadsheet) or 'Network Rail Users XML bulk upload' (for calls from the mobile app).

Select Value										
Filter >	o 2	Ŷ	¥	÷	1 -	2 0	f2	\rightarrow	₩	ĸ
Object Structure	Description	i								
<u> </u>						_				
CLOSECALL	Non-Netwo	ork Rail User	rs bulk	<u>uploa</u>	<u>id</u>					
MXRCLOSECALL	Network Ra	ail Users XM	L bulk	uploa	<u>d</u>					
									Cano	cel
Application Import										
Object Structure:	Network Rail Us	ers bulk upload	d					Import li 500	imit:	
Operation: Sync O										
Import Configuration										
Import Preview? Selec	t File							OK	Cano	cel



Click on 'Browse', which will open your file browser.

Go to 'Desktop', click on the data file and 'Open'

🏉 Choose File to Upload				x
🚱 🕞 🗢 💻 Desktop 🔸	▼ ⁴ j	Search Desktop		٩
Organize 🔻 New folder			•	0
★ Favorites ▶ Desktop ▶ Downloads ▶ Jennifer ▶ CC Training - Shortce	Close Call System Menu icons.rt Rich Text Format 6.65 MB CloseCallLoad-19-10-2012.txt Text Document 1.53 KB	F		^
SMIS Business Team SMIS Training Recent Places	Data Uploading.doc Microsoft Word 97 - 2003 Docun 399 KB	ı		E
SAFETY POLICY	Firefox Setup 10.0.2.exe Firefox Mozilla imagesCAIINKBJ.jpg JPEG image 7.17 KB			
SDisk (C:)	ISMIS Log On - Live system Internet Shortcut 240 hytes			Ŧ
File <u>n</u> ame:	CloseCallLoad-19-10-2012.txt 🔹	All Files (*.*) <u>O</u> pen	Cancel	•

The file will be populated in the import file field. When first importing a bulk upload txt file always tick the 'Import Preview' tick box before clicking on 'OK'. This ensures any errors still present in the spreadsheet will be flagged to you. Once the errors have been corrected and you receive a message saying, 'Import Successful' you can upload the data without clicking Import Preview.

Application Impo	rt	
Object Structur	re: IrNon-Network Rail Users bulk upload	nport limit: 500
Operation: Sync	O ,	
Import Config	guration	2
Import Preview	Select File CloseCallLoad-11-07-2019.txt	OK Cancel

Addressing data errors

If there is incompatible information in the file, the Close Call System will not be able to populate the data into the appropriate fields in the system, as it won't know where the data belongs (i.e. if the 'Involved Project' code has been entered incorrectly). By clicking Import Preview when you attempt to import the spreadsheet data, 'Preview Results' will appear informing you where the errors are in the file.



Preview Results File Name: CloseCallLoad-11-07-2019.txt Total number of documents: 1 Valid documents: Invalid documents: 1	Make a note of the fields that need amending in the spreadsheet (<i>NB. 'Location'</i> <i>is the systems language for the word 'Field'</i>). Close the preview results window by clicking 'OK'. You must return to your originally saved import spreadsheet and amend the fields accordingly. Go through the Convert process again.
Results: BMXAA5598E - Processing of an inbound transaction failed. The processing exception is identified in document 1 which starts at line 2 and ends at line 2. BMXAA40495 - The value specified exceeds the maximum field length that is allowed for this attribute: Value = Network Rail, Object Name=SR, Attribute Name=ASSETSITEID, Maximum Length=8.	Once you have made the changes in the spreadsheet, click 'Convert' again and the .txt will be saved on your desktop over the previous file. Ensure you click 'Preview Results' again so that any further errors can be highlighted to you.
οκ	
Preview Results File Name: CloseCallLoad-11-07-2019.txt Total number of documents:	Keep following bulk uploading processes of this guide until the following message appears in the 'Preview Results' confirming that the data import mode is successful.



Uploading the data

Once your 'Preview Results' shows as successful, you can upload your data into the Close Call system.

Click on 'Application Import' again and click on **Browse** and select the .txt file from your desktop. **Do** <u>NOT</u> tick Import Preview this time.

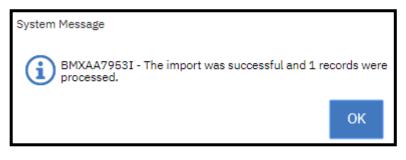


Application Imp	ort			
Object Structu CLOSECALL		Rail Users bulk upload	Import limit: 500	
Operation: Sync	Q			
Import Conf	iguration			2
Import Previe	W? Select File	CloseCallLoad-11-07-2019.txt		OK Cancel

Click on **'OK'.**

A message will appear to inform you that the import was successful and how many records have been processed.

You can check that the events are now in the Close Call System by searching for the reference numbers.





Closing a Close Call (if event can be closed at source)

Processing the Close Call Record

On the top menu bar of the close call record click on the icon to process the close call.

If one or more of the following criteria are met by the close call event, the close call will be sent to a Responsible Manager for review -

- 1. Risk Ranking is 'High'
- 2. 'Can the event be closed at source' is marked 'No'
- 3. Potential Breach of Life Saving Rule? Is marked 'Yes' or 'Potential Breach'

Manual Input		
Assign this Close Call to a Responsible Manager because it cannot be closed at source, the Risk Ranking is High or a potential breach of Li	ife Saving Rules occur.	red
O Cancel the Close Call Event		
Memo:		
		_
	OK Cancel	

If the 'Can the event be closed at source' is marked as **'Yes'**, the risk ranking is <u>not</u> 'High', and there is no breach to a lifesaving rule, the close call event can be closed without an RM's review.

Manual Input		
Close this Close Call Event		
Cancel the Close Call Event		
Memo:		
	ОК	Cancel

There is an option on both pop-up messages to **cancel** the event and type a memo.





Notification of Updates to Users

When the RM provides an update on the RM tab, the user who created the original report will be emailed and/or sent a text with an update.

Event Date: 07/11/17 08:59
Event Location:
Project/Division: LEEDS CITY STATION
Risk Ranking: HIGH
Event Description: Test
Action Taken:
RM Progress Update:
test
This is a progression update regarding your Close Call, ref 314523 - no action is required.

Dealing with Rejected Close Calls

If a RM rejects a closure of a Close Call report, the Close Call Team is sent a notification stating the RM has rejected the Close Call.

The user would be required to carry out any further action in response to the Responsible Manager Rejection comments and where required, to re-allocate the Close Call to another Responsible Manager. This is as per process for search/insert a project division and click on save to ensure Close Call ID 314523 has been rejected by Responsible Manager.

Event Date: 11/7/17 8:59 AM Event Location: Project/Division: LEEDS CITY STATION Risk Ranking: HIGH Event Description: Test Responsible Manager comment: Test

the Close Call is re-allocated to the new Responsible Manager.

Once all these updates have taken place, a user can once again progress the close. This is done by clicking on the process icon on the top menu bar and repeating the steps mentioned above.



Escalation notification of Close Call without action after 28 days

1. The Close Call is still in either 'W-RM' or 'R-MA' Status 28 days after it has been reported

2. The Close Call has been re-assigned and from the Close Call re-assign date it is still in 'W-RM' or 'R-MA' Status after 28 days

The escalation email is sent on the 29th day

An escalation will trigger 28 days after the Close Call was reported and where the status is still R-MA **and** no RM progress update has been entered yet. The escalation will automatically send a reminder email to all



RMs assigned to the organisation unit (Project/Division) of the Close Call as well as the RMs sitting at the next level above the organisation unit of the Close Call. If there are no RMs sitting at this next level, the escalation will look for the next available RM within the hierarchy.

The notification email will be generated to inform the RM(s) and the Responsible Manager Role above the current RM Role within the hierarchy setup, informing them of the outstanding close call remaining open awaiting action.

This email notification will be

Close Call 314387 awaits review by the Responsible Manager, this review is outstanding. This outstanding action has now been escalated in your hierarchy. This email notification is sent to you the owner of this Close Call. This Close Call remains open and awaits action(s).

Log on to the <u>Close Call System</u> to review and complete pending actions for your accepted Close Call

recorded in the communications log of the Close Call record, capturing its content, recipients as well as date and time it has been triggered. The email notification is generated at 07:00 on the 29th day after the Close Call has been reported (based on Event Date field) and is in 'RMA' status.



6. Reviewing a Close Call | Responsible Manager

Introduction

Users assigned the role of **'Responsible Manager' (RM)** are required to review and process close calls if one or more of the following criteria are met by the close call event -

- 1. Risk Ranking is 'High'
- 2. 'Can the event be closed at source' is marked 'No'
- 3. Potential Breach of Life Saving Rule? Is marked 'Yes' or 'Potential Breach'

The RM will receive an email notification for all close calls escalated for review. They will also see events awaiting review in their Start Centre. The calls shown in the RM's start centre will be for events assigned to their level of the organisation hierarchy and <u>any levels lower</u> in the hierarchy that do not have an RM assigned to it.

Note: RM's should only review calls that are at their level of the hierarchy. If an RM opens a call at a lower level of the hierarchy that is not theirs to review, the event becomes locked to them and the RM who should review the event will not be able to process the record.

Notifications from the system

When a close call event is entered that is assigned to a project (or level of the organisation hierarchy), the RM (or RM's if more than 1) assigned to that project will receive notification via email. The email includes the following information:

Event Date

• Event Location - This is taken from the 'Other Location' field in the event, and will help to identify which close calls are yours to review

- Project/Division
- Risk Ranking
- Event Description
- Action Taken

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 <u>Close Call System</u> 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.

• Hyperlink to the close call event - *If the RM is not already logged into CCS when clicking on this link, they will be required to enter their login credentials before they are taken to the event screen.*

Viewing a Close Call awaiting RM Completion via Start Centre

If the RM does not use the email to review the event, they can access the event via the Start Centre. The portlet called '**My Organisations Close Calls Awaiting Responsible Manager'** shows all close call events that require RM completion for the organisation project level that the RM is assigned to in the hierarchy or lower.

The event will be colour coded based on the number of days since the event was reported.



My Organisations Close Calls Awaiting Responsible Manager 🏾 🕅 <u>Filter</u> 🔸 🔍 🍒 🛃 🛤									
Close Call Number	Involved Project	NR Programme/Region	<u>NR Route/Area</u>	Reported Date	<u>Close Call Age</u>	Risk Ranking			
377817	TEST DIVISION 1	NOT APPLICABLE		 11/07/2019 07:21		HIGH			
						1-1 of 1			

Note: Events that are awaiting RM review for divisions/projects below theirs in the organisation hierarchy will also appear in this portlet. Be careful not to open events that are not yours to review to avoid locking the event to your user.

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

Accepting a Close Call

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.

Following confirmation of the above, a RM can now 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.

Complete Workflow /	Assignr	ment									
Task:											
Accept Close Call											
Action:											
Accept Close C	all Eve	nt									
Reject Close Ca	all Ever	nt									
Memo:											
Earlier Memos	¥	<u>Filter</u>	> 0,				0 - 0) of 0		⊥	¥
Memo				Pers	on				Transac	tion Date	•
			S)								
	7	$\langle \rangle$		There ar	e no rows to	o display.					
and the second s	(_	'									
									01/	0	
									OK	Can	Del

You will be returned to the close call reporting screen.



Rejecting a Close Call

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.

Complete Workflow A	Assignment						
Task:							
Accept Close Call							ļ
Action:							ļ
Accept Close Ci	all Event						
Reject Close Ca	all Event						
							ļ
• Rejection Comme	ents:						ļ
Reasons why	unu						
					/4		
Earlier Memos	Filter	0 8			0 - 0 of 0	→ ±	ĸ
Memo		Perso	on			Transaction Dat	te▼
		-					
		There are	e no rows to dis;	nlav			
Section and		filter w was	5 110 1 0 115 10 Sizy	July			
and the second s	5. A						
						OK Ca	ncel

Reviewing a Close Call

The RM should review the event information and what was done about it. They should check that the fields have been correctly input (i.e. Accurate of the category and locations are dependent on Responsible Manager reviewing and verifying the correct category of root cause.)

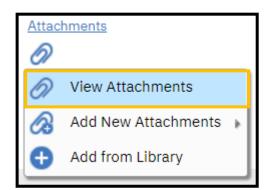
Viewing Attachments

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

Attachments	
Ø	

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.

Vie	w Attachm	nents								
	7	Filter > O				← 1 ·	- 1 of	1 >	₩	K
	Docume	nt Description	Doc	ument Folde	er Docum	nent Version	Print?	Applicatio	'n	
	<u>TEST</u>	Test	Diag	(rams			~	SR	i	Ē
		_							(ОК

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.

Vie	w Attach	ments										
	¥	<u>Filter</u>	>					← 1 ·	- 1 of	1 >	⊻	ĸ
	Docum	ent De	script	ion	Doc	ument Folder	r Docum	nent Version	Print?	Applicatior	1	
	<u>TEST</u>	Tes	st		Diag	rams			~	SR	i	Ē
												ОК



Responsible Manager Detail tab

Responsible Managers Detail

This section is to be completed by the RM to enable them to describe what has been done about the close call and to record completion dates etc.

Responsible Manager Detail	
Is Local or Formal Investigation required:	O,
Is follow up required?	_

Is Local or Formal Investigation required? The RM can detail whether a local or formal investigation is required based on the information given in the Close Call. Click on the spyglass to view the options.

Is follow up required? This is a tick box to show whether someone is required to carry out a follow up on the close call event (this is an optional field).

Person responsible for providing Follow Up: This will allow the RM to assign the close call record to an individual who will be required to conduct a follow up. *This*

record is not sent to the person named in this field; therefore, it is the RM's responsibility to notify the individual responsible for providing a follow up that they have been assigned this task.

Assignment Date: This field is read-only and pre-populated with the date when the RM completes the Responsible Managers Detail section.

Date scheduled for completion: This is input by the RM, and is the deadline date by which any actions should be completed.

Date Completed: This field is read-only. The date in which the RM processes the close call record for completion is entered into this field by the system.

'RMs - Actions Required' box tab <u>must</u> be completed outlining

the actions required to resolve the reasons why a close call has not been closed.

Assignment Date:				
11/07/2019 00:00				
Date scheduled for completion:				
Ê				
Date completed:				
ini				

Action Detail			
RMs - Action Required:			



RM Progression Update when completed the contents of this field will then be sent via email and text message to the reporter. An email and text message will also be sent to the close call reporter when the call has been processed to 'Closed' status.

RM Progression Update:		
ନ ၞ ቶ ⑮ ⑮ B I ⊻	2 \$ ≟ ≞ 湮 ∉ ≕ ≡ ≡ ₽ ▾ 🛋 ▾ ▲ ▾ 💻 ▾	که <table-of-contents> 🖉</table-of-contents>
Font	Size Format None	•

Lifesaving Rules

Life Saving Rules Details	The Life Saving Rules tab is mandatory for all Network Rail users and will have been at least partially completed at the time the close call				
Potential breach of Life Saving Rule?:	event was reported.				
Working with moving equipment - exclusion zone Required plans and permits in place Working with electricity - test before applying earths	If 'Potential Breach' has been selected, you must review the record and determine whether there was a breach of the lifesaving rules, and adjust the 'Potential Breach of Life Saving Rule' box to either YES or NO. If YES is selected, ensure the correct lifesaving rule(S) has been selected.				
Working with electricity - test before touch	For further information about Network Rail's Lifesaving Rules, please go to <u>here</u>				
Driving - always wear a seatbelt					
Driving - using handheld device whilst driving					
Working at height - without a harness					
Equipment fit for intended purpose					
Taking responsibility - influence of drugs/alcohol					
Taking responsibility - trained/assessed as competent/right equipment					



Providing Progression Update(s) on a Close Call

Responsible Managers Detail

Within the RM details tab, when a close call is accepted by a RM, they will be required to populate the RMs - Action Required field. This field can be updated if additional actions are required or the initial action required has been modified.

Action Detail			
RMs - Action Required:			
			11

A RM can provide an update to the Close Call reporter on how the action outlined in the action required field is progressing.

RM Progression Update:
♪ ♀ ╃ ▣ ■ B I ⊻ \$ Ё Ё 湮 湮 ≡ ≡ ≡ 參 ▾ ≧ ▾ A ▾ ≌ ▾ Đ № ‰
Font Size Format None
Action Detail
RMs - Action Required:
RM Progression Update:
♪ ♀ ♀ ⑮ ⑮ B I ⊻ \$ 旨 돈 徑 徑 ≕ ≕ ≕ ≡ ♂ ▾ ≧ ▾ A ▾ ≞ ▾ ▷ ☜ ぷ
Font Size Format None





When this field is updated, a RM will be required to select the Save icon to ensure their new note is saved and a notification via email and text message are sent to the close call reporter. Once a RM has saved an update, they will be able to add additional notes right

away.

Whenever an update is provided, the work log will be updated to show all the updates that have been provided by the RM. This information will also be accessible via the <u>Work Log</u>

Work Logs	V E	Filter > O	76	$\Phi = \Psi$	🔶 1 - 1 of 1	L ->			₩	R
Record		Class	Create	ed By		Date	Туре	Summary	View	vable?
> 377817	7	> SR	ADRIA	AN.JONES@R	SSB.CO.UK	11/07/2019 07:39	UPDATE	RM progression update		

Progress the Close Call to the Assurance Manager for review

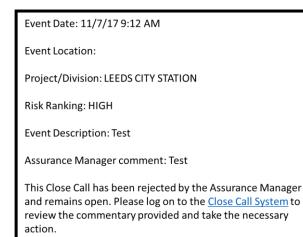
When the RM is ready to close out the close call (having completed their full review and checking the details/categories) before processing to close out a Close Call for an Assurance Manager, Click on the process icon on the top menu bar.



The *Manual Input* popup will appear, where the RM can either close or cancel the close call event. To move the close call onto the AM, click Close this Close Call event and then click OK.

Manual Input		
Close this Close Call event		
Cancel the Close Call Event		
Memo:		
	OK	Cancel

Dealing with a Closed Call Assurance Rejection



If an Assurance Manager rejects a closure of a Close Call, the user is sent a notification stating the Assurance Manager has rejected the Close Call.

If an Assurance Manager rejects the RM's closure of a Close Call report, the RM will be required to update as outlined in the AM's rejection comments. A RM can also check the <u>Communications Log</u> for the AM's comments.



Once RM have carried out further action (i.e. improvement in feedback under 'Responsible Manager Action' field), the RM can once again progress the Close Call Closure. This is done by clicking on the process icon on the top menu bar.



Complete Workflow Assignment Task: Accept Close Call Action: Accept Close Call Event Reject Close Call Event Memo Filter > O + O of 0 + C Memo Transaction Date There are no rows to display. Cancel							
Accept Close Call Action: Accept Close Call Event Remo: Earlier Memos Filter Person Transaction Date There are no rows to display.	Complete Workflow A	Assignment					
Action: Accept Close Call Event Person Transaction Date There are no rows to display.	Task:						
Accept Close Call Event Memo: Earlier Memos Filter Memo Person Transaction Date There are no rows to display.	Accept Close Call						
Accept Close Call Event Memo: Earlier Memos Filter Memo Person Transaction Date There are no rows to display.							
Reject Close Call Event	Action:						
Memo: Earlier Memos Filter Memo Person Transaction Date There are no rows to display.	Accept Close C	all Event					
Earlier Memos Filter Memo Person Transaction Date There are no rows to display.	Reject Close Ca	all Event					
Earlier Memos Filter Memo Person Transaction Date There are no rows to display.							
Earlier Memos Filter Memo Person Transaction Date There are no rows to display.							
Memo Person Transaction Date Image: There are no rows to display.	Memo:						
Memo Person Transaction Date Image: There are no rows to display.							
There are no rows to display.	Earlier Memos	▼ <u>Filter</u> >			← 0 - 0 c	of o 🔿	₫.
There are no rows to display.	Memo		Person	ı		Transa	ction Date 🔻
There are no rows to display.							
There are no rows to display.			Š*				
OK Cancel				no rows to display	/.		
OK Cancel	and the second second	(\bigcirc)					
OK Cancel							
OK Cancel							
OK Cancel							
						OK	Cancel



A user will be returned to the Close Call report screen. To Progress Close Call for closure and AM review click on the process icon on the top menu bar.

The *Manual Input* popup will appear. Click *Close this Close Call event* and then select OK.

Manual Input		
Close this Close Call event		
Cancel the Close Call Event		
Memo:		
	014	
	ОК	Cancel



7. Logs

Accessing Communications Log

To access the communications log, select Log from the tab options within a Close Call.



Once Log has been selected, the communications log will be displayed.

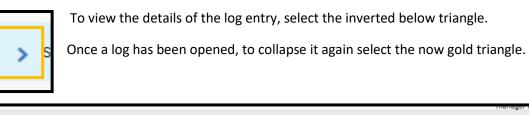


When a Close Call is created, users will be able to view all the communication logs (i.e. emails) that have been generated. These entries can range from 28-day escalations to closes being processed to a RM or AM.

An RM or AM can use the communications log to review the previous activities.

С	ommu	inication Log Wo	ork Lo	og								
	Com	munication Logs	7	Filter	• O ₆	76	Ϋ́	¥	🔶 1 - 6 of 6 🚽		<u>ل</u>	٤
		Originating applicat	tion	ID	Create	d By		То		Date	Subject	
	>	SR			ADRIA	N.JONES@	NR.COM	adrian	.jones@nr.com	11/07/2019 08:24	Close Call #377817 ha been submitted.	IS
	>	WFPROCESS	C	CEVENTAL	l Jennii	ER.FOX@	RSSB.CO.UK	adrian	.jones@nr.com	11/07/2019 07:50	Close Call ID 377817 has been closed.	
	>	WFPROCESS	(CCEVENTAL	L ADRIA	N.JONES@	RSSB.CO.UK	oliver. david.	iggan@rssb.co.uk, earn2@networkrail.co.uk, aadsforth@networkrail.co.u mcgoldrick@networkrail.co r.fox@rssb.co.uk		Close Call ID 377817 - Th Close Call ha been assigned to Assurance Manager for review) nis as ed e
	>	WFPROCESS	(CCEVENTAL	L ADRIA	N.JONES@	RSSB.CO.UK	adrian	.jones@rssb.co.uk	11/07/2019 07:42	Close Call ID 377817 - Th Close Call ha been accepte by Responsit Manager	nis as red
	>	SR			ADRIA	N.JONES@	RSSB.CO.UK	adrian	.jones@nr.com	11/07/2019 07:39	Close Call 377817 has been update by the Responsible Manager	ed
	>	WFPROCESS	(CCEVENTAL	L ADRIA	N.JONES@	NR.COM	jamesl	brew@hotmail.com	11/07/2019 07:24	Close Call ID 377817 - Th Close Call ha been assigne to responsib manager for review	nis as ed ole





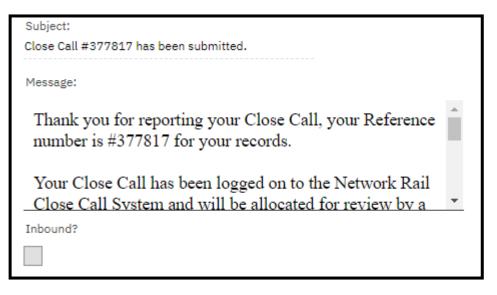
Details	
Originating application: SR ID: Created By: ADRIAN.JONES@NR.COM Date: 11/07/2019 08:24 To: adrian.jones@nr.com cc: bcc:	Subject: Close Call #377817 has been submitted. Message: Thank you for reporting your Close Call, your Reference number is #377817 for your records. Your Close Call has been logged on to the Network Rail <u>Close Call System and will be allocated for review by a</u> Inbound?
Attachments 7 Filter > 0	0 - 0 of 0 1
Document Description	
There are no rows to display.	

The log itself will contain information on who created the log entry, the date the entry was created.



Details	
Originating	application:
SR	, application.
эк	
ID:	
	× .
Created By	r:
ADRIAN.JO	DNES@NR.COM
Date:	
11/07/201	9 08:24
To:	
adrian.jone	s@nr.com
cc:	
bcc:	
500.	

The log entry will also display the subject and body of the email that was generated.



Accessing the Work Log

To access the work log, select Work Log from the tab options within the Log tab.



Communication Log	Work Log

When a Close Call is created, users will be able to view all the communication logs (i.e. emails) that have been generated. Within the Work Log, an RM or AM can review the previous rejections or instructions prior to closure that were created.

Work Logs 🏼 🏹 🧯	Filter > 🔍		- 1 - 1 of 1 🔿			₩
Record	Class	Created By	Date 🕶	Туре	Summary	Viewat
> 377817	> SR	ADRIAN.JONES@RSSB.CC	.UK 11/07/2019 07:39	UPDATE	Q RM progression update	
~	Once a log	; has been opene	d, to collapse it agai	n select tl	ne now gold triangl	le. 🗸
S C Netails Record: 377817	Once a log	g has been opene	Summary: RM progression update	n select tl	he now gold triang	le. 🗸
Details Record:	Dnce a log	; has been opene	Summary: RM progression update Details:			
Details Record: 377817		g has been opene	Summary: RM progression update Details: fon 이 수 대 비 B I 브 Font	\$ ⊨ ≡ ∈ ∈		2 6 *
Petails Record: 377817 Class: SR Created By:		; has been opene	Summary: RM progression update Details: 이 다 다 한 1월 18 1 보	\$ ⊨ ≡ ∈ ∈		2 6 *

The log itself will contain information on who created the log entry, the date the entry was created.



Details	
Record:	
377817	>
Class:	
SR	
Created By:	
ADRIAN.JON	NES@RSSB.CO.UK
Date:	
11/07/2019	07:39
Type:	
UPDATE	O,
Viewable?	

The log entry will also display the text that had been entered into the RMs - Action Required field.

Summary: RM progression update	
Details:	
Font	Size Format None
Test	



8. Administrator Actions

Creating User Accounts

Introduction

It is the Organisation Administrator's responsibility to respond to user registration requests. The new User will register their details via the Close Call log in screen, select their organisation from a list and request the type of user they want to be (User or Responsible Manager). An email will be sent to the Organisation Administrator notifying them of the pending user request, and a notification will also appear in the Organisation Administrator tab in their Close Call Start Centre.

User Requests

Organisation Administrators have two tabs within their Start Centre. One refers to their permissions as a Close Call User, and the second tab is their Organisation Administrator tab. It is in this tab that the Close Call User request will appear.

Close Call User	Organisation Administrators
Bulletin	Board 🍞 <u>Filter</u> > 🔍 🍒
① To filt	er for specific records, specify dat
Subject	t Message
	Bulletin (3) To filt

Processing a User Request

You will receive an email notifying you that a new user has registered their details. Access the system via the link on the email or go to Organisation Administrator tab in the Close Call System Start Centre and click on the new users email address link under 'My Assigned User Requests'.

My Assigned User Requests 😿 <u>Filter</u>	> 🔍 🌠 🕂 🖆	
<u>User</u>	Default Insert Organisation	<u>Status</u>
ADRIANJ@NR.COM	RSSB	NEWREG
Set Chart Options		1 - 1 of 1

The information input by the user during self-registration will already be populated in the correct fields.

Setting the Data Entry Level for the user

The user needs to be assigned with the correct data entry permissions, so they can create close call records against the right level of the organisation's hierarchy.



To set the data entry level click on the > icon next to the **'Data Entry Level Settings'** field, in the **User Settings** section.

User: ADRIAN.JONES@NR.COM		Status: NEWREG	
Login Information			
+ User Name: adrian.jones@nr.com		Set Password	
Personal			Z
Person: ADRIAN.JONES@NR.COM	Display Name: Jones Adrian	Address:	
First Name: Jones	Primary Phone: 123456	City:	
Last Name: Adrian	+ Primary E-mail: adrian.jones@nr.com	State/Province:	
		ZIP/Postal Code:	
		Country:	
User Settings			
Assurance Manager?		Use Default Insert Organisation as Display Filter? 🗾	
User is Responsible Manager?		Requested User Type: USER	
+ Default Insert Organisation: NR O, Network Rail		E Function/Department/Delivery Unit etc: NR Trg	
* Data Entry Level Settings:	>		
*			
User Settings			
Assurance Ma	nager?		
User is Responsible Ma	nager?		
+ Default Insert Organis	sation: NR	🔍 Network Rail	
+ Data Entry Level Se	ttings:		>



Drilldown			
 Select > to show children 	en. Select 👻 to hide children. Select 🖉 to return location / asset.		
Organisation Structure			
Location: NR_MAIN	Network Rail	Status: OPERATING Site: NR	Q
System NR 🔶	 IR_MAIN:Network Rail CAWAITING ALLOCATION: CORPORATE FUNCTIONS:CORPORATE FUNCTIONS INFRASTRUCTURE PROJECTS:INFRASTRUCTURE PROJECTS MERSEVRALL TRIAL:Merseyrail Trial NR_TRAINING:NR Training Division (Training purposes) ROUTE BUSINESSES:Route Businesses 		
			Cancel

Click on the blue arrow next to the organisation level appropriate for the user*.

* The level of the organisation hierarchy selected will determine the information the User sees within the Close Call System and the level of the organisation they can log close calls against.

For example: If granted permissions at the Infrastructure Division level, they can only see calls logged by other users at this level or lower within the organisation and can only log close call events at that level or lower. We recommend that users are assigned to the top level of the Organisation hierarchy wherever possible.

Approving / Rejecting the User

Approve or reject the user by clicking on the **'Process'** icon in the top menu bar.



Click on either the 'Approve' or 'Reject'* radio button. Click 'OK'

* If rejecting a user, the process ends here.



Complete Workflow	Assignment										
Task: Review and approv	ve/reject the	self-regist	ered user								
Action: Approve the Se	elf Registratic	on									
 Reject the self- 	-registration										
Earlier Memos	▼ <u>Filter</u>	→ O ₆	76	\mathbf{T}	Ψ	÷	0 - 0	0 of	0 ⇒	4	×
Memo			Person						Transa	action Date	e▼
A contraction	-5	Th	aere are no	rows to	displa	у.			ОК		ncel

Setting the User Security Role

If you have approved the user, a pop-up box will appear, reminding you to assign the user to the required security roles.

There will only be one security role for your organisation which is the 'User Group'. <u>All</u> Close Call Users <u>must</u> be assigned to this group which allows them to create close call events.

Close the pop up.



You will be taken to the 'Close Call Security Groups' screen, where you assign the new user in the correct security role. To find your organisation, put your cursor into the empty **'Group'** field and press return. Select your organisation user group from the list.



Q Advanced Search ♥							rks					
Groups	Filter	⇒ O,	73	C	ተ	$\mathbf{\Psi}$	÷	1 -	1 of 1	\rightarrow	4	Ľ
Group	Des	cription								Organisation		
											O ,	
NR USER	<u>RS</u> Nev	vork Rail U	sers							NR		R
Selec	Select Records											

Select the organisation hyperlink to view the organisation user list. The current list of users within the organisation will appear.

Click on 'New Row' at the bottom of the user list.

	Group: NR_USERS Nework Ra	il Users	=			
	Organisation: NR					
Users	⊽ <u>Filter</u> > ् ४ ↑ ↓ ←	1 - 10 of 3822 →				<u>.</u>
	User≜	Person	Name	Status	Туре	
>	4CS@NETWORKRAIL.CO.UK	4CS@NETWORKRAIL.CO.UK	4CS 4CS	INACTIVE	TYPE 1	<u> </u>
>	AARON.HENRY@NETWORKRAIL.CO.UK	AARON.HENRY@NETWORKRAIL.CO.UK	aaron henry	ACTIVE	TYPE 1	Ē
>	AARON.LEDWIDGE@NETWORKRAIL.CC	AARON.LEDWIDGE@NETWORKRAIL.CC	Aaron Ledwidge	ACTIVE	TYPE 1	Ē
>	AARON.NEAL@NETWORKRAIL.CO.UK	AARON.NEAL@NETWORKRAIL.CO.UK	Aaron Neal	INACTIVE	TYPE 1	Ē
>	AARON.RIDOUT@NETWORKRAIL.CO.U	AARON.RIDOUT@NETWORKRAIL.CO.U	Aaron Ridout	ACTIVE	TYPE 1	Ē
>	AARON.SCUDDER@NETWORKRAIL.CO.	AARON.SCUDDER@NETWORKRAIL.CO.	Aaron Scudder	ACTIVE	TYPE 1	Ē
>	AARON.SMITH@NETWORKRAIL.CO.UK	AARON.SMITH@NETWORKRAIL.CO.UK	Aaron Smith	ACTIVE	TYPE 1	Ē
>	AARON.TERRY@NETWORKRAIL.CO.UK	AARON.TERRY@NETWORKRAIL.CO.UK	Arron Terry	ACTIVE	TYPE 1	Ē
>	ABDUL-WADUD.AHMED@NETWORKRA	ABDUL-WADUD.AHMED@NETWORKRA	Abdul wadud-ahmed	INACTIVE	TYPE 1	Ē
>	ABDUL.KHAN@NETWORKRAIL.CO.UK	ABDUL.KHAN@NETWORKRAIL.CO.UK	Abdul khan	INACTIVE	TYPE 1	Ē
Nev	v Row					

Click on the > to the right of the User field

Details						
+User:	<u> </u>	First Name:				
Person:						
Name:		Туре:				
Status:						
New Row						

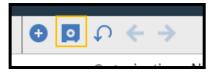


Click on 'Select Value'

+User:		
	>	
Person:	0,	Select Value
	Ø	Go To 🗼

Select (or search for the user) the new user from the list and click on the 'save' icon.

Se	lect Value				
	Filter > (0, 70	$\uparrow ~ \downarrow$	← 1 - 1 of 1 ⇒	⊻ ⊻
	User			Name	
	adrian.i				
	ADRIAN.JONES@!	NR.COM		Jones Adrian	
					Cancel



The new user will receive an email notifying them that their registration has been approved.

Making a user 'inactive'

You may need to change the status of a user from active to inactive, for example, if an employee leaves your organisation.

Finding the Close Call user

Within the Organisation Administrator tab, click on Close Call Users.

Organisation Administrators



Favorite Applicatio	ns			
Close Call Users				
Close Call Security Groups				

To see all the users, place the cursor in an empty field and press 'return' on your keyboard. This will show <u>all</u> the users in your organisation.

-	Q Advanced Search 🔽 🧕 Save Query 👻 📕 Bookmarks							
Users 🔽 <u>F</u>	lter > 0, 🛛	C 🛧	↓ ← 0 - 0 of 0 →				\downarrow	¥
User▲		Person	First Name	Last Name	Display Name	Status		
							C)
A sugar a second		To find records, search options, select the Insert	ise the filter fields and then press Enter. Fo ise the Advanced Search button. To enter con in the toolbar.	or more a new record,				

ADRI
ADRI

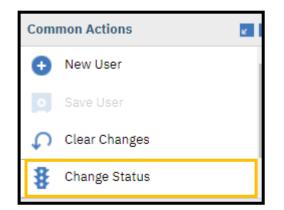
Alternatively, you can search for the user by typing part or all or part of their name into the appropriate fields, i.e. first name

User	Person	First Name	Last Name	Display Name	Status	
		jones	<u> </u>			0
ADRIAN.JONES@NR.COM	ADRIAN.JONES@NR.COM	Jones	Adrian	Jones Adrian	ACTIVE	R
Select Records						

Click on the user's email address to open the user's record.

Click on 'Change Status' from the left-hand menu





Click on the *New Status drop down box and select 'inactive' and then click 'OK'.

Change Status		
User: ADRIAN.JONES@NR.COM	Jones Adrian	
Status: ACTIVE Active		
New Status: Inactive		
Status Date: 15/07/2019 10:33		
		OK Cancel

The user's status will now show as 'inactive' and their ability to log into the system will be disabled.

A user's status can always be reinstated to 'Active' by repeating the above process and select 'Active' as the New Status.



Resetting User Accounts

Introduction

The Organisation Administrator can reset user passwords if they have forgotten it. If a user fails to type in the correct password their account may also get blocked, and therefore the Organisation Administrator will need to re-activate the user's profile and reset their password to enable them to access the Close Call System (CCS).

Unblocking a user's account

If a user is unable to log in to CCS, the Organisation Administrator needs to access the user's account profile.

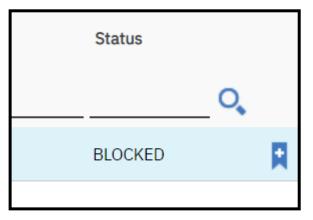
Click on the Organisation Administrators tab within the Start Centre and click on Close Call Users hyperlink.

Organisation Administrators	
Favorite Applications	
Close Call Users	
Close Call Security Groups	

Check the user's account status

Press return in the empty filter fields to view all users, or type in all or part of the user's name to filter the user list.

User 📤	Person	First Name Last Name	Display Name	Status	
		jones		Q	
ADRIAN.JONES@NR.COM	ADRIAN.JONES@NR.COM	Jones Adrian	Jones Adrian	ACTIVE	R
Select Records					



Check the status of the user's account. If it shows as Blocked, the account will need to be activated again and the password reset. If the status shows as active, it is only the password that needs resetting.



Updating the account status

Click on the user's email address to access their account.

Click on 'Change Status' from the left-hand menu

Com	mon Actions	
Ð	New User	
٥.	Save User	
G	Clear Changes	
\$	Change Status	

If the account status is showing 'Blocked' click on the Change Status icon

Change Status			
User: ADRIAN.JONES@N	NR.COM	Jones Adrian	
Status: BLOCKED	Blocked		
+ New Status: Active Inactive	▼		
Status Date: 15/07/2019 10:37	,		
			OK Cancel



Resetting a user's password

Click on 'reset password' button

Login Information	
• User Name: adrian.jones@nr.com	Set Password

Type in a new temporary password in the two fields provided.

Ensure this password is simple and written all lower case so that the user can easily enter the system.

Change Passwords		
User: ADRIAN.JONES@NR.COM	Jones Adrian	
Password Hint		Z
Password Hint Question: MAIDENNAME Maiden name of mother		
Answer: Jones		
New Password		
New Password: Confirm New Password:		
View Password:		
		Generate Password
E-mail Password to User? Password Should Expire After First Login? Also Change Database Password to This Password?	Keep the two tick boxes ticke password is emailed to the us logging in, the user will be as password of their choice.	ser and upon
Database Password		2 -
		OK Cancel

The record will automatically be saved



Adding Projects / Organisation Structures

To add a new NR Project to the table

This action will be carried out by RSSB.