



Bulk Uploading Data into the Close Call System

Version 4

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1 Introduction

Some organisations will already have a system in which to record 'close call' data. It is mandatory for Principal Contractors and Plant Operator Licence Holders to share their data, and so close call events must also be entered into the rail industry's Close Call System (CCS).

In order 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.

2 Completing Bulk Upload Spreadsheet

You must obtain a blank bulk upload spreadsheet each time you want to bulk upload events into CCS. Please email closecall.enquiry@rssb.co.uk to request a new spreadsheet. This will ensure the blank copy you receive is the latest version of the document.

2.1 Creating the bulk upload file

In order to successfully upload your data, you must 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, therefore, 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).

Figure 1

1	A	B	C	D	E	F	G
	Convert						REQUIRED DATA
2		Close Call ID (Unique)	Event Date	Involved Project	Describe the Event and What Could 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 ot	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	er 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 protruding 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.

Figure 2

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

Figure 3

Free text	Pick list	
F	G	H
REQUIRED DATA		
What were you able to do about it	Risk Ranking	Category
Put boarding over with cones to barricade the area un	HIGH	<div style="border: 1px solid black; padding: 2px;"> <ul style="list-style-type: none"> 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 CONFINED SPACES CONFINED SPACES \ TUNNELS </div>

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

2.1.1 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.

To view and download the list of projects for your organisation, go to the Start Centre and click on **Go To > Assets > Organisation Structures** in the top right corner of the screen

Figure 4



Put the cursor in one of the empty filter fields and press return on your keyboard. Your organisations project will be listed.

Figure 5

Use the green arrow to scroll through the page of projects

Division	Description	Status	Organisation
CLAPHAM DELIVERY UNIT	Clapham Delivery Unit	OPERATING	HHRAIL
ELECTRIFICATION ENGINEER RAYNES PARK	Electrification Engineer Raynes Park	OPERATING	HHRAIL
HHRAIL_MAIN	HHRAIL Main	OPERATING	HHRAIL
HHRAIL_PROJECT1	HHRAIL_PROJECT1	OPERATING	HHRAIL
HHRAIL_PROJECT2	HHRAIL_PROJECT2	OPERATING	HHRAIL

Division Populate the 'Project Involved' column (column D) of your bulk upload spreadsheet with the project name as it is written in the **Division** column.



Use the Download hyperlink to export the project list to Excel

By downloading the project list, you can copy the project 'Division' straight into your bulk upload spreadsheet.

2.1.2 Converting Data

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

Convert	Close Call ID (Unique)	Event Date	Involved Project	Describe the Event and What Could have happened	What were you able to do about it	Risk Ranking
	JF006	02/10/2012	JFMAIN	Heras Fence panels with sharp edges	The old panels were replaced with new ones and all ot	LOW OTHER
	JF007	03/10/2012	JFMAIN	Alexandra Palace - overgrown entrance	Vegetation cut back	LOW CONTROL OF CHEMICALS
	JF008	04/10/2012		Huntingdon - pallets in turning area	Now deliver to Peterborough instead	LOW CONTROL OF CHEMICALS
	JF009	05/10/2012	N ELECTRICAL	Puddle of water on kitchen floor	Service party called out and leak repaired	LOW CONTROLLED SPACES
	JF010	06/10/2012	S ELECTRICAL	Protruding Scaffold pole.	The protruding pole was removed, the tarpaulin was rol	LOW CONTROL OF CHEMICALS

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.

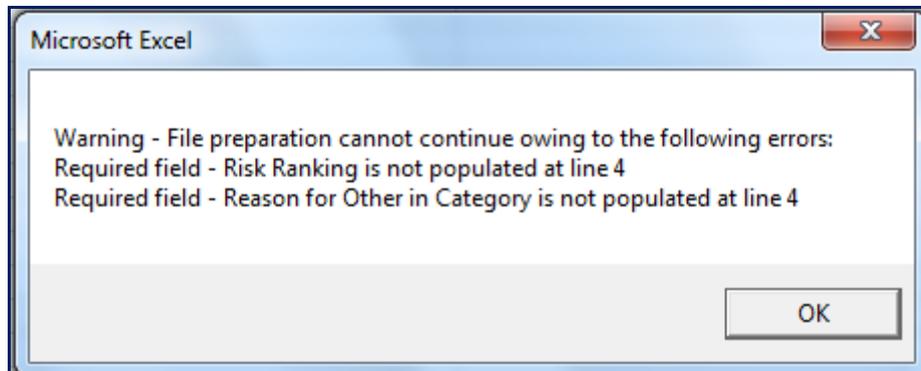
Figure 6

	A
1	Convert
2	

2.1.3 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.

Figure 7

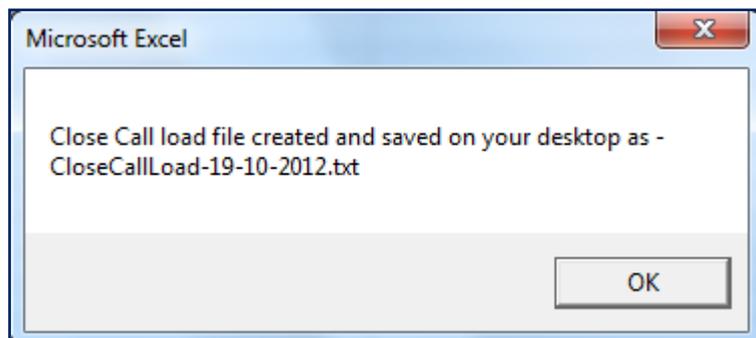


Click 'OK' and return to your saved spreadsheet and complete/change the fields accordingly.

2.1.4 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 in order to find the file easily.

Figure 8

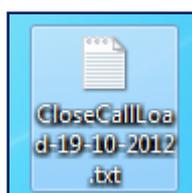


Click 'OK'.

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

The file will show on your desktop as per figure 11 below.

Figure 9

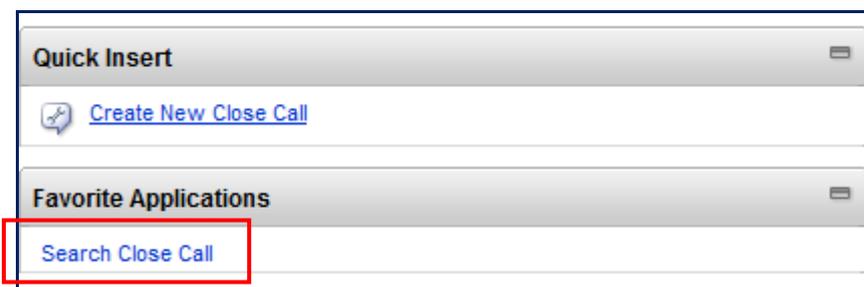


2.2 Uploading the data in 'preview' mode

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'.

Figure 10



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

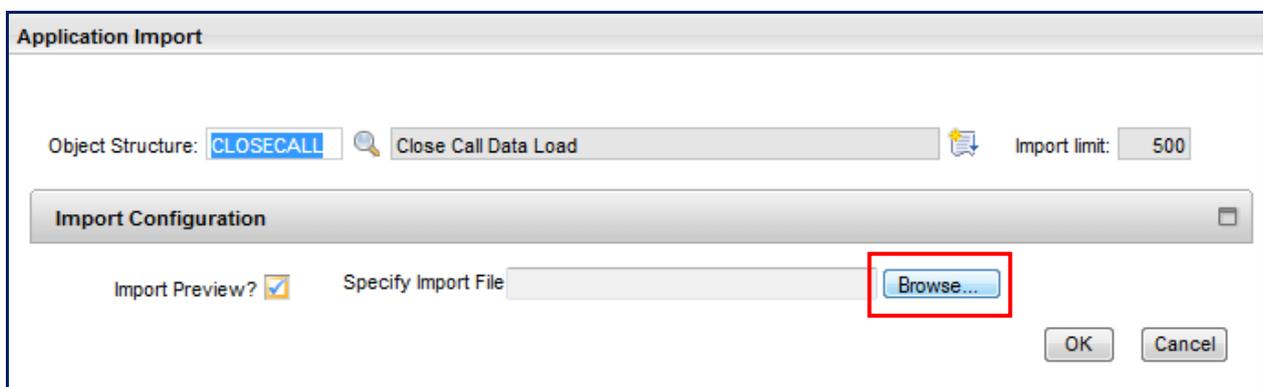
Figure 11



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

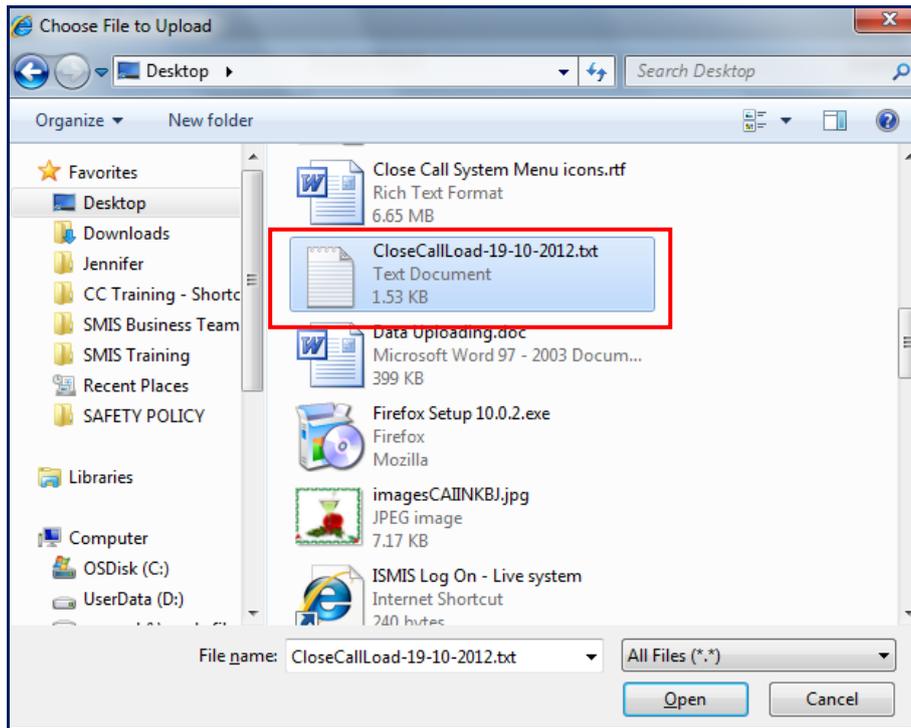
Click on 'Browse', which will open up your file browser.

Figure 12



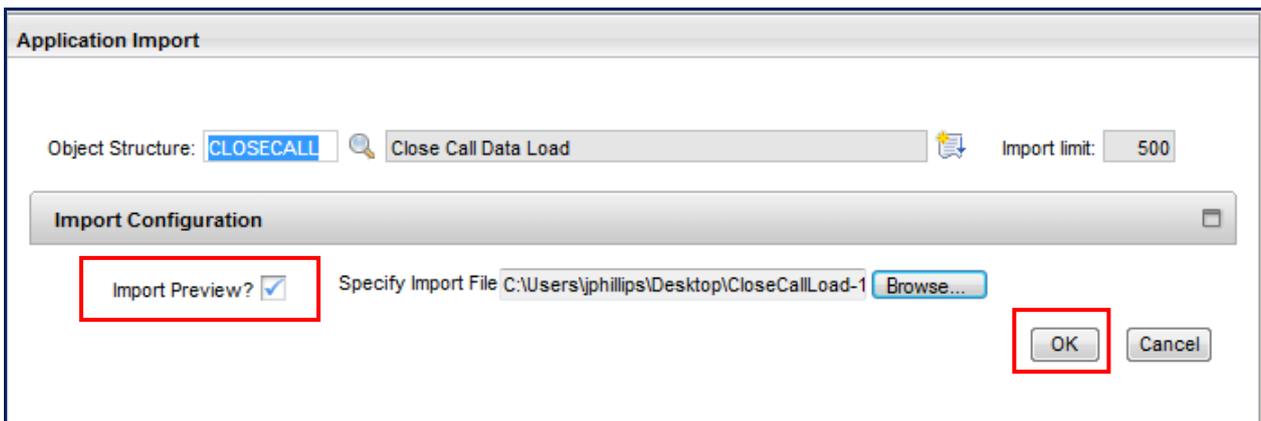
Go to 'Desktop', click on the data file and 'Open'

Figure 13



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.**

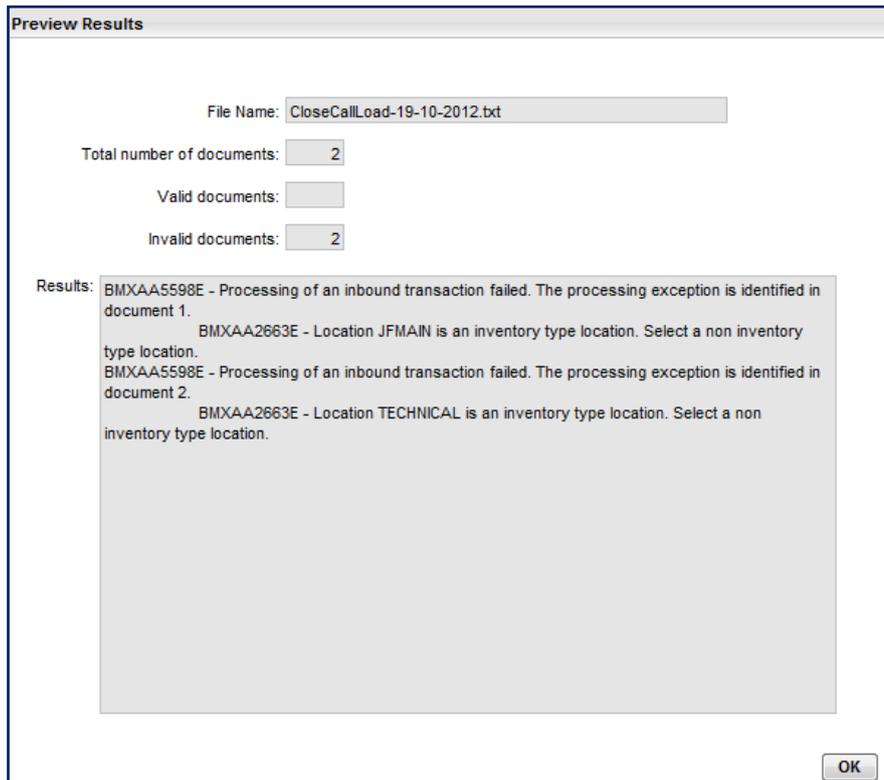
Figure 14



2.2.1 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.**

Figure 15



The screenshot shows a 'Preview Results' window with the following information:

- File Name: CloseCallLoad-19-10-2012.txt
- Total number of documents: 2
- Valid documents: 0
- Invalid documents: 2
- Results:
 - BMXAA5598E - Processing of an inbound transaction failed. The processing exception is identified in document 1.
 - BMXAA2663E - Location JFMAIN is an inventory type location. Select a non inventory type location.
 - BMXAA5598E - Processing of an inbound transaction failed. The processing exception is identified in document 2.
 - BMXAA2663E - Location TECHNICAL is an inventory type location. Select a non inventory type location.

An 'OK' button is located at the bottom right of the window.

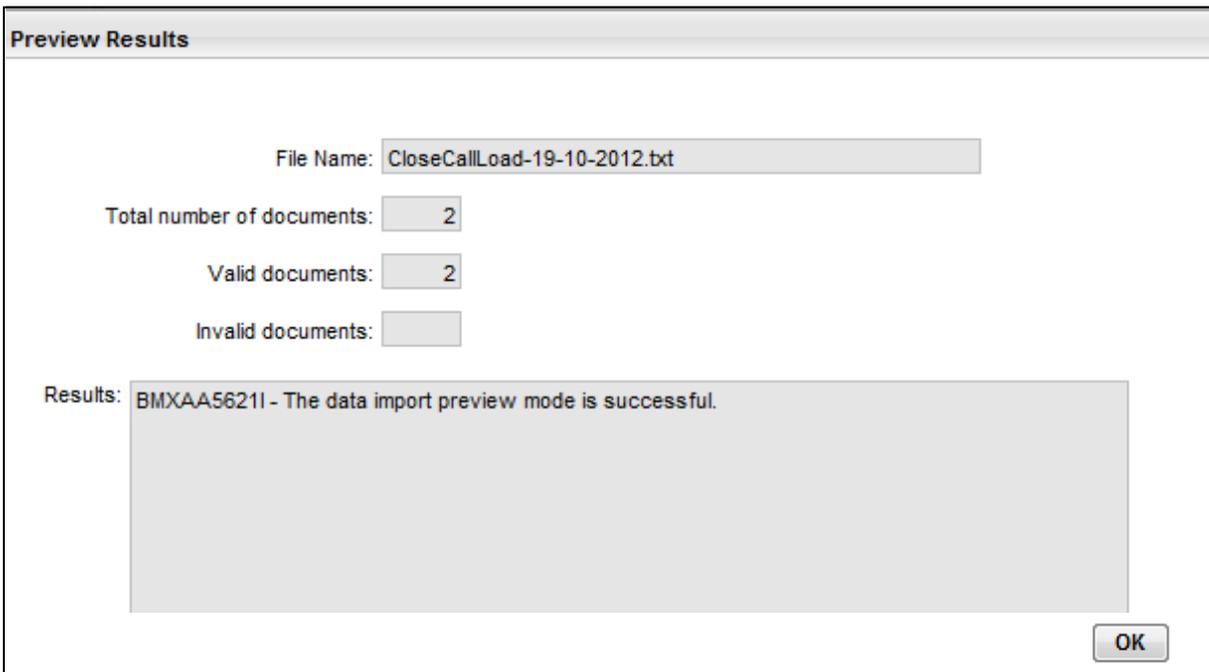
Make a note of the fields that need amending in the spreadsheet (*NB. 'Location' is the systems language for the word 'Field'*). Close the preview results window by clicking 'OK'.

You must return to your originally saved import spreadsheet (see section 2.1) and amend the fields accordingly. Go through the Convert process again (see section 2.1.1 to 2.1.3).

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. Follow the steps in section 2.2. **Ensure you click 'Preview Results' again so that any further errors can be highlighted to you.**

Keep following process 2.1 to 2.2 of this guide until the following message appears in the 'Preview Results' confirming that the data import mode is successful.

Figure 16

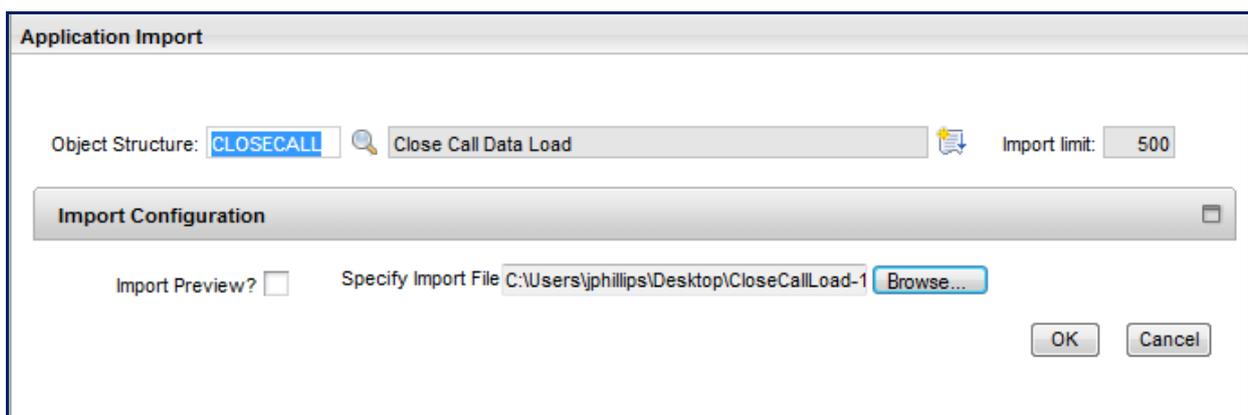


2.3 Uploading the data

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 NOT tick Import Preview this time.**

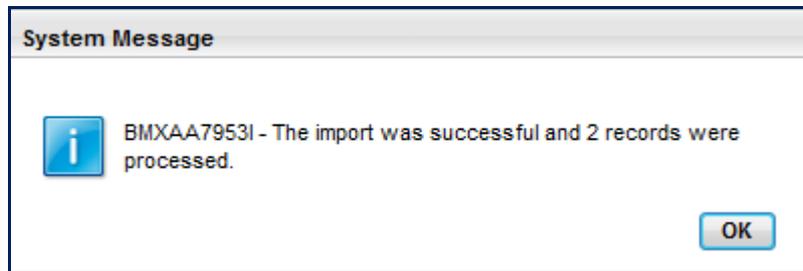
Figure 17



Click on 'OK'.

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

Figure 18



You can check that the events are now in the Close Call System by searching for the reference numbers (see the 'Searching' guidance note on how to search for Close Call records).

Please contact the CCS Support Team on closecall.enquiry@rssb.co.uk if require any further information or advice.