

Super User – Training Checklist

When training your colleagues on how to use the Close Call System, please ensure all the following elements are covered.

RSSB will set up all Organisation Administrators with Responsible Manager (RM) rights. The tasks with an 'X' next to Org Administrators are tasks in which only the Org Administrators will perform. If they are also in the role as RM, then you will need to cover all the Close Call User & RM specific tasks as well.

Key:

Black text: All Users tasks
 Green text: RM only tasks
 Orange text: Org Admin only tasks
 Red italics: Key notes

Task	Close Call User	Responsible Manager	Organisation Administrator	Tick to confirm training has been completed
SHOW THE NEW USER THE HELPSITE AND WHERE TO FIND GUIDANCE DOCUMENTS!	X	X	X	
Registering to be a User <i>Users (except Org Admins) need to register their details via the Close Call log in screen. Org Administrators need to be set up by RSSB.</i>	X	X	<i>If an Org Admin requires access Contact RSSB</i>	
Adding new projects			<i>Org Admin to Contact RSSB</i>	
Setting up a new user <i>Org Administrators to respond to user registrations, which will appear in Org Administrators Start Centre.</i>			X	
Searching Close Call <ul style="list-style-type: none"> Filter Search Advanced Search Downloading results to Excel 	X	X		
Creating a Close Call Event <ul style="list-style-type: none"> Mandatory Fields Drop down lists Setting the Risk Matrix <i>(what each risk category means)</i> Closing a Close Call at Source <i>(what this means and the consequence of not closing it at source)</i> Processing & completing own Close Call Record Entering a CloseCall via handwritten postcard <i>(additional optional fields in Additional Details & Organisation Specific Detail sections)</i> 	X	X		
Processing & completing another users Close Call <ul style="list-style-type: none"> Accessing CC event via link in Start Centre Responsible Manager section Processing & Closing CC event 		X		

Task	Close Call User	Responsible Manager	Organisation Administrator	Tick to confirm training has been completed
Bulk Uploading Data into Close Call <i>*Only cover if applicable to your organisations process*</i> <ul style="list-style-type: none"> • Matching the fields from your system to the Close Call System • Converting data in spreadsheet <i>(validating file format)</i> • Application Import <i>(previewing content – validating content)</i> • Importing the data into Close Call 	X	X		
Running Reports	X	X		