



# Organisation Administrator – Responding to new Close Call User Requests

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## Version 2

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# 1 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.

## 2 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.

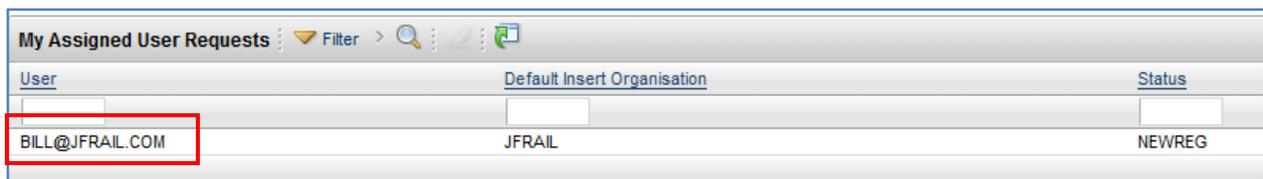
**Figure 1**



### 2.1 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'.

**Figure 2**



The screenshot shows a table titled 'My Assigned User Requests'. The table has three columns: 'User', 'Default Insert Organisation', and 'Status'. The first row of data is highlighted with a red rectangular box. The data in this row is: 'BILL@JFRAIL.COM' in the 'User' column, 'JFRAIL' in the 'Default Insert Organisation' column, and 'NEWREG' in the 'Status' column. Above the table, there are icons for 'Filter', search, and refresh.

User	Default Insert Organisation	Status
BILL@JFRAIL.COM	JFRAIL	NEWREG

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

### 2.1.1 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 organisations hierarchy.

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

**Figure 3**

The screenshot shows a user profile page for 'JOE.BLOGGS@TEST06.CO.UK'. The 'User Settings' section is highlighted with a red box. It contains a 'Data Entry Level Settings' field with a double arrow icon (>>) next to it. Other fields in the 'User Settings' section include 'User is Responsible Manager?' (checkbox), 'Default Insert Organisation' (TEST06), and 'Data Entry Level Settings' (empty field with >> icon). To the right, there are checkboxes for 'Use Default Insert Organisation as Display Filter?' and 'Requested User Type' (USER), and a dropdown for 'Function/Department/Delivery Unit etc.' (Infrastructure).

**Figure 4**

The close-up screenshot shows the 'User Settings' section. The 'Data Entry Level Settings' field is highlighted with a red box and has a double arrow icon (>>) next to it. Other fields in the 'User Settings' section include 'User is Responsible Manager?' (checkbox), 'Default Insert Organisation' (TEST06), and 'Data Entry Level Settings' (empty field with >> icon).

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

**Figure 5**



*\* 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.*

### 2.1.2 Approving / Rejecting the User

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

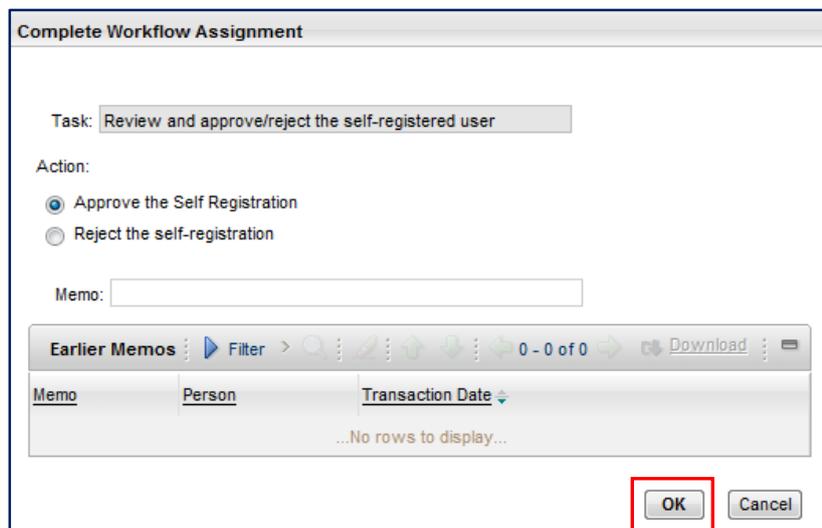
**Figure 6**



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

*\* If rejecting a user, the process ends here.*

**Figure 7**



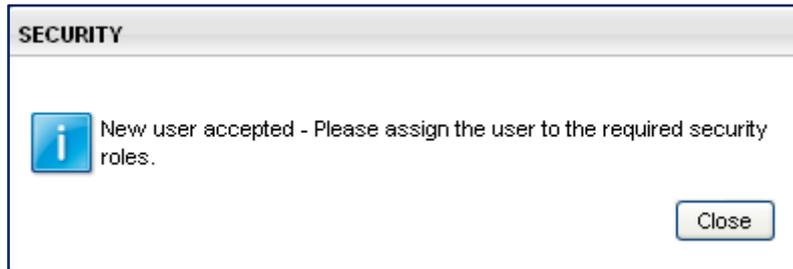
### 2.1.3 Setting the User Security Role

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'. **All** Close Call Users **must** be assigned to this group which allows them to create close call events.

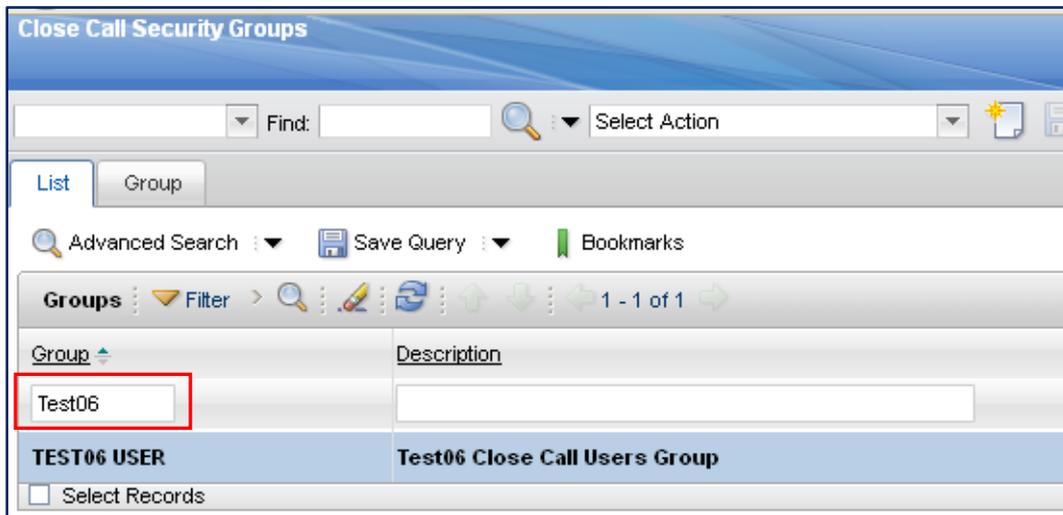
Close the pop up.

**Figure 8**



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.

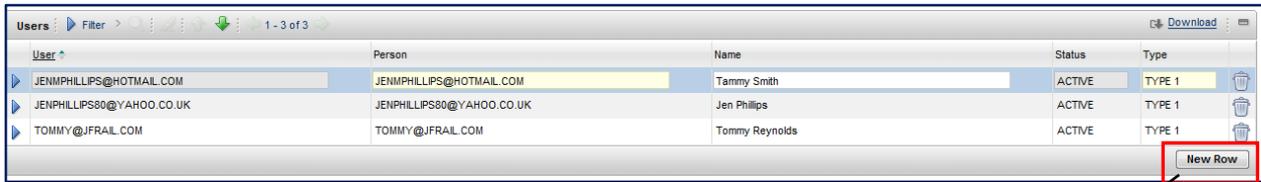
**Figure 9**



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.

Figure 10



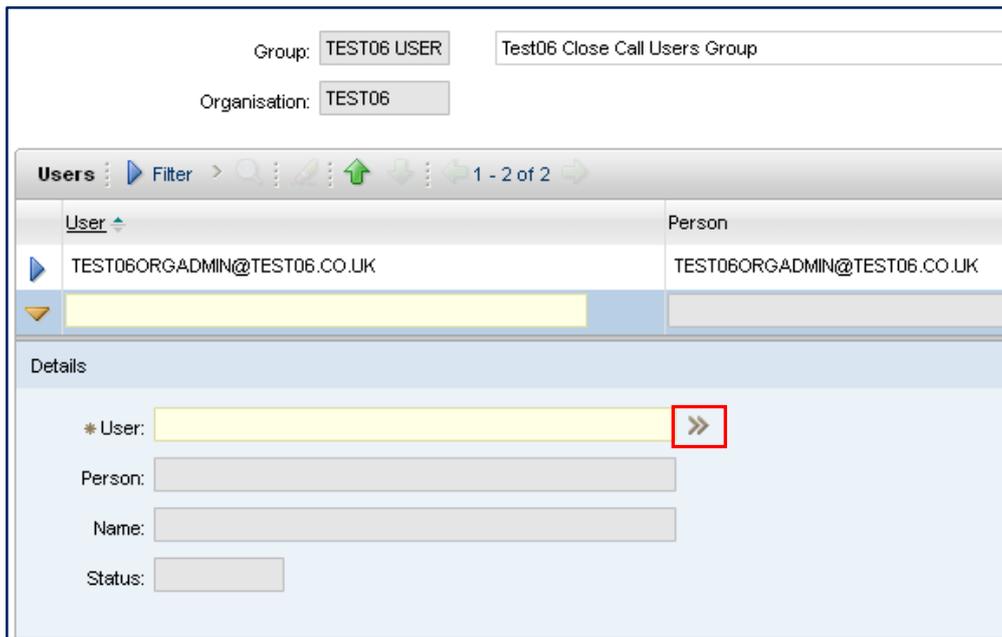
User	Person	Name	Status	Type	
JENMPHILLIPS@HOTMAIL.COM	JENMPHILLIPS@HOTMAIL.COM	Tammy Smith	ACTIVE	TYPE 1	
JENPHILLIPS80@YAHOO.CO.UK	JENPHILLIPS80@YAHOO.CO.UK	Jen Phillips	ACTIVE	TYPE 1	
TOMMY@JFRAL.COM	TOMMY@JFRAL.COM	Tommy Reynolds	ACTIVE	TYPE 1	

**New Row**

Click on the >> to the right of the User field



Figure 11



Group: TEST06 USER    Test06 Close Call Users Group  
Organisation: TEST06

Users Filter > 1 - 2 of 2

User	Person
TEST06ORGADMIN@TEST06.CO.UK	TEST06ORGADMIN@TEST06.CO.UK

Details

\* User:  **>>**

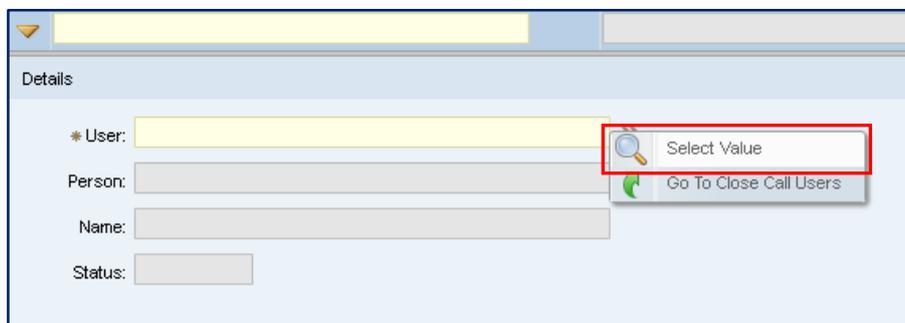
Person:

Name:

Status:

Click on 'Select Value'

Figure 12



Details

\* User:  **Select Value**

Person:

Name:

Status:

Go To Close Call Users

Select the new user from the list and click on the 'save' icon.

Figure 13



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

## 2.2 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.

### 2.2.1 Finding the Close Call user

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

Figure 14



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

Figure 15

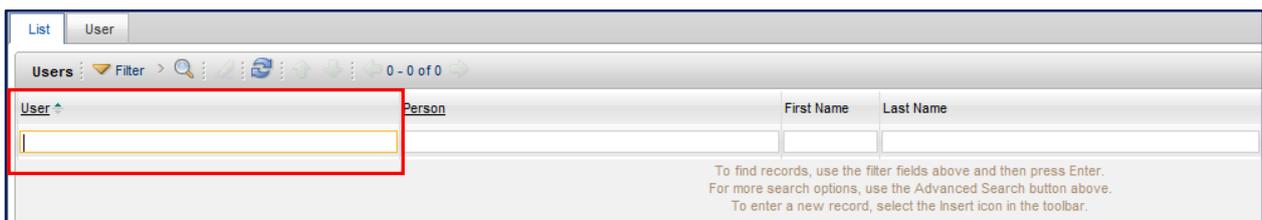
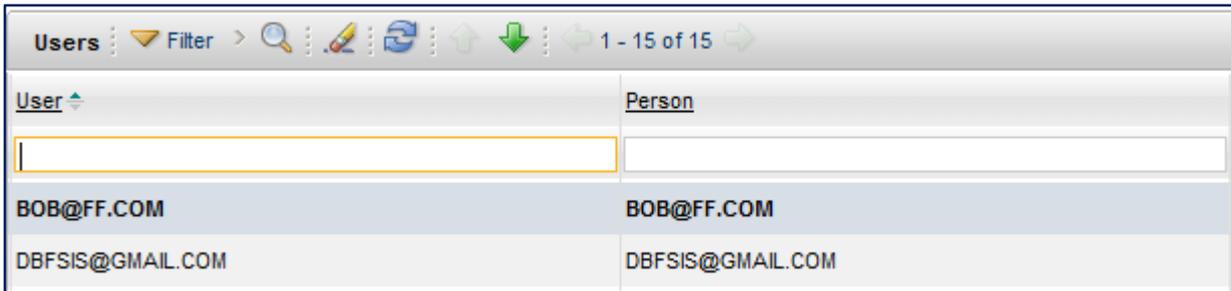


Figure 16



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

Figure 17

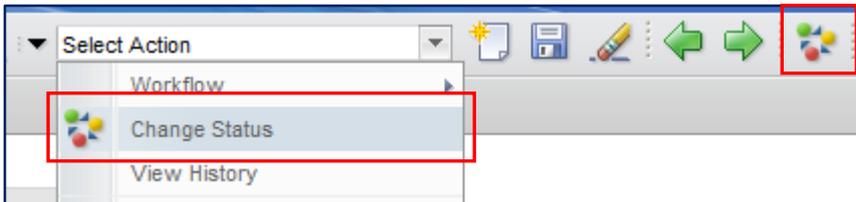


Click on the users email address to open the user's record.

## 2.2.2 Changing the user's status to inactive

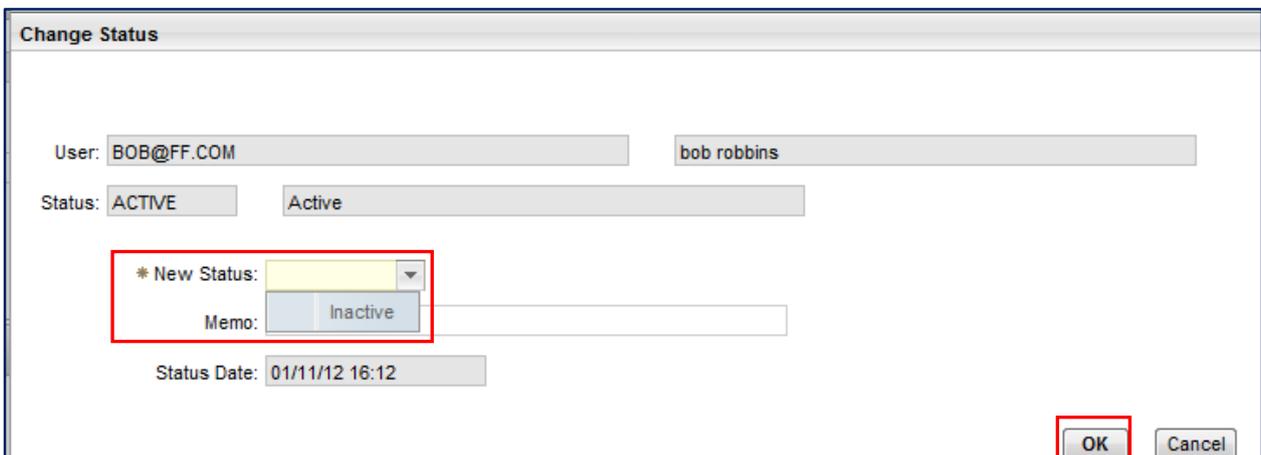
Click on 'Select Action' and 'Change Status' or alternatively click on the  icon on the top menu bar.

Figure 18



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

Figure 19



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

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



Please contact the CCS Support Team on [closecall.enquiry@rssb.co.uk](mailto:closecall.enquiry@rssb.co.uk) if require any further information or advice.