Organisation Administrator – Responding to new Close Call User Requests

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.
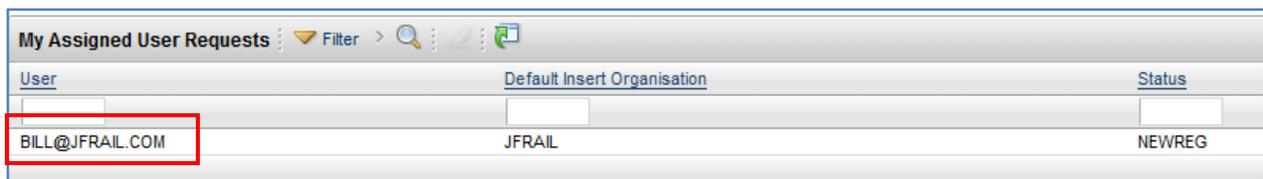
Figure 1

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 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

Figure 4

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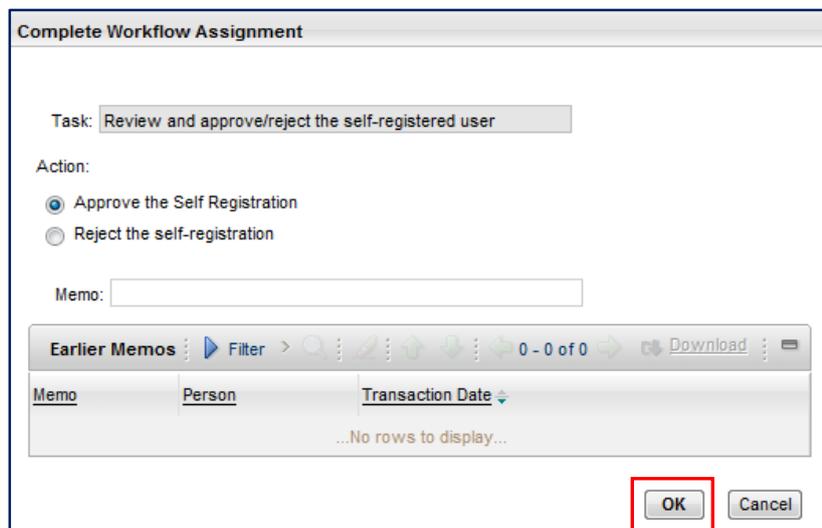Approve or reject the user by clicking on the **'Process'** icon in the top menu bar.

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.
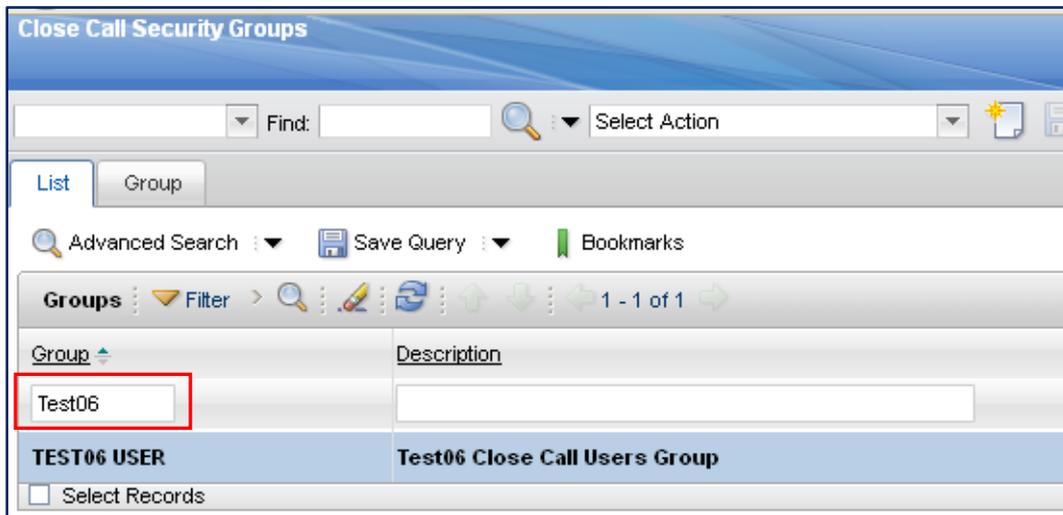
Close the pop up.

Figure 8
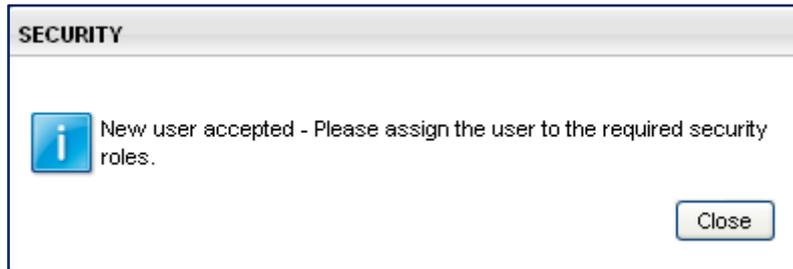
You will be taken to the 'Close Call Security Groups' screen, where you assign the new user in the correct security role. To find your organisation, put your cursor into the empty **'Group'** field and press return. Select your organisation user group from the list.
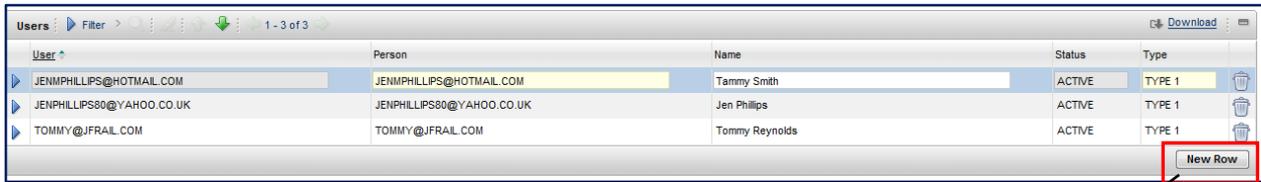
Figure 9

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

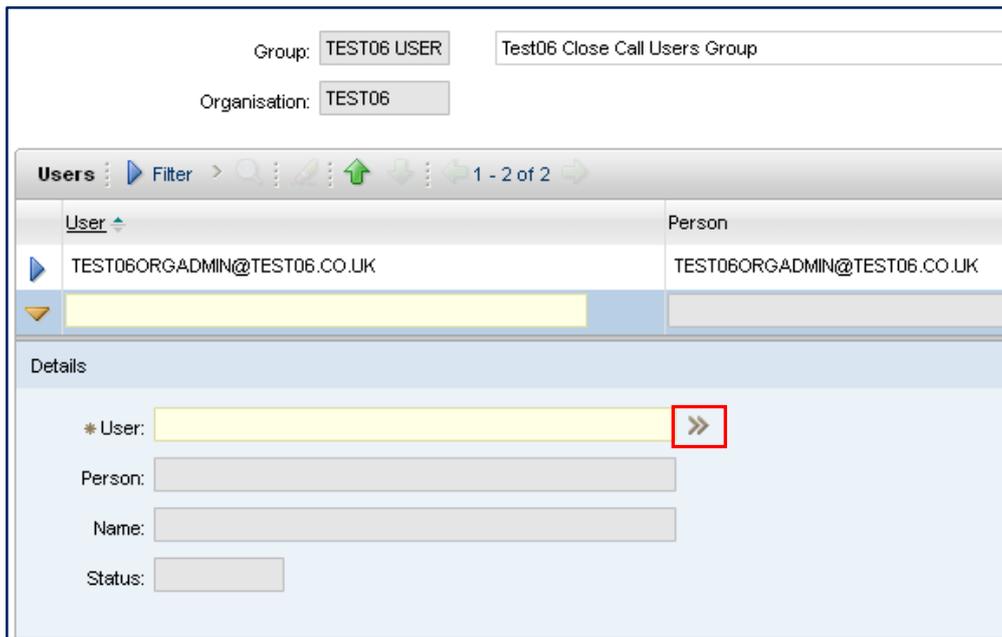Click on **'New Row'** at the bottom of the user list.

Figure 10

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

Figure 11

Click on **'Select Value'**

Figure 12
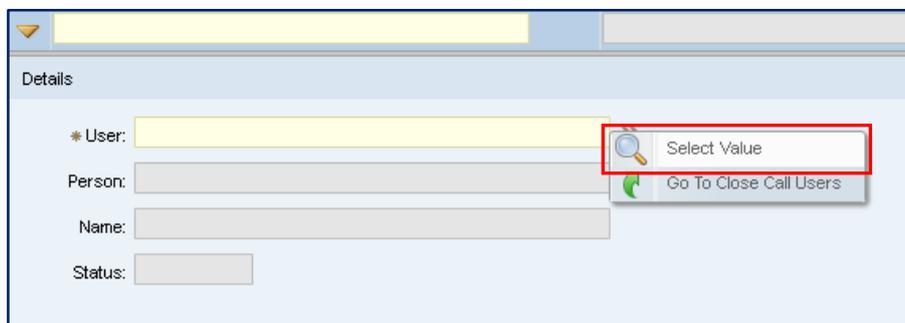
Select the new user from the list and click on the **'save'** icon.

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 <u>all</u> the users in your organisation.
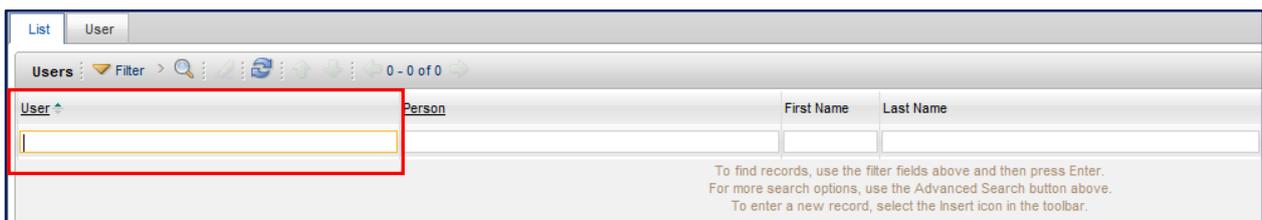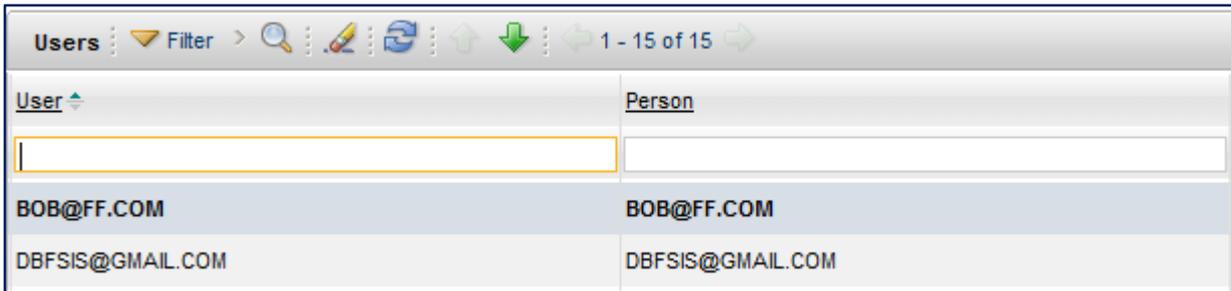
Figure 15

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
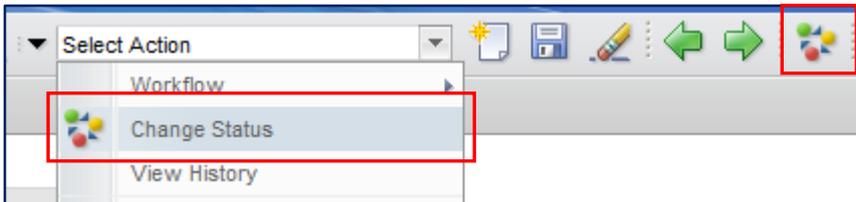
Figure 17

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

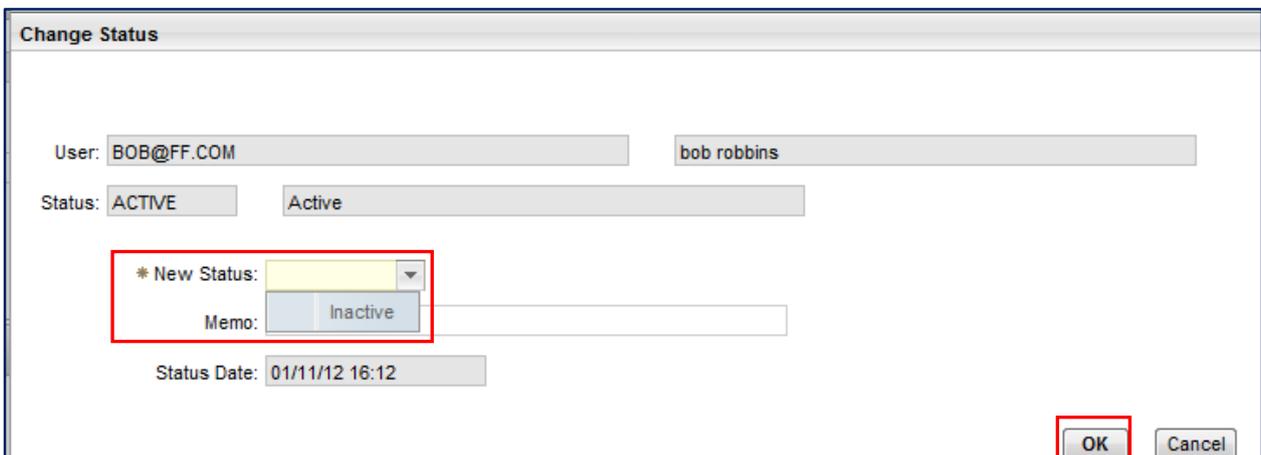## 2.2.2 Changing the user's status to inactive

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 if require any further information or advice.