Searching & Running Reports in CCS

Version 3

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1 Introduction

The Search function within Close Call allows all users to search for their organisations close call records using various search criteria*. Close Call records can be looked up and viewed individually in the system. Search results can also be downloaded to an Excel document if required.

** Be aware that you can only view Close Call Records for the organisation division/project that you have access to and any divisions/projects that sit **below** this in the hierarchy. You will not be able to view any Close Calls entered for divisions above the level of the hierarchy you have access to.*

2 Searching for Close Call Records

There are numerous search criteria available within the Close Call Search function.

2.1 Accessing Search

Click on **'Search Close Call'** from the Start Centre

Figure 1

Favorite Applications	▬
Search Close Call	

2.1.1 Searching close calls and filtering the search

The search allows you to view all the close call records that have been entered within your organisation division/project or lower in your organisations hierarchy. Pressing 'Return' in one of the empty fields will list all the Close Call records that exist.

Figure 3

Close Call ID ↓	Describe the Close Call event and wh...	Involved Project	Organisation	Network Rail Period
JF0101	Loose Cables - Trip hazard	JFRAIL_MAIN	JFRAIL	201207
JF0100	Manhole cover lid missing. Falling hazard.	JFRAIL_MAIN	JFRAIL	201208
1079	//Abandoned sleepers left in walkway. *Tripping hazard.//*	JFRAIL_SOUTH	JFRAIL	201208
1072	Data	JFRAIL_SOUTH	JFRAIL	201208
1026	Tripping hazard in office	JFRAIL_SOUTH	JFRAIL	201208
1015	fdsfdsfds	JFRAIL_NORTH	JFRAIL	201207

You can filter the results to narrow your search, for example –

Close Call ID
If you know the ID you are searching for you can enter this in the ID field.

Describe the Close Call event and what could have happened
You can search for all or part of the text written in the free text description box within a Close Call record. Such as 'tripping'
Figure 4

Involved Project

You filter the search by project involved to view records created against a specific Network Rail project.
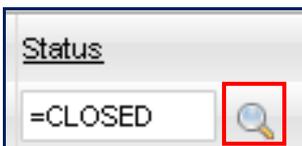
Figure 5

Close Call records Status

Click on the spy glass and select the Close Call record status you would like to search, i.e. Open, Closed etc.
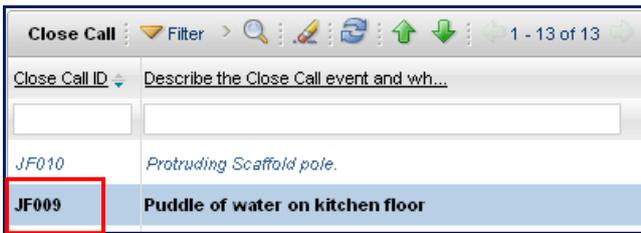
Figure 6

Figure 6.1

2.1.2 Viewing the Close Call event record

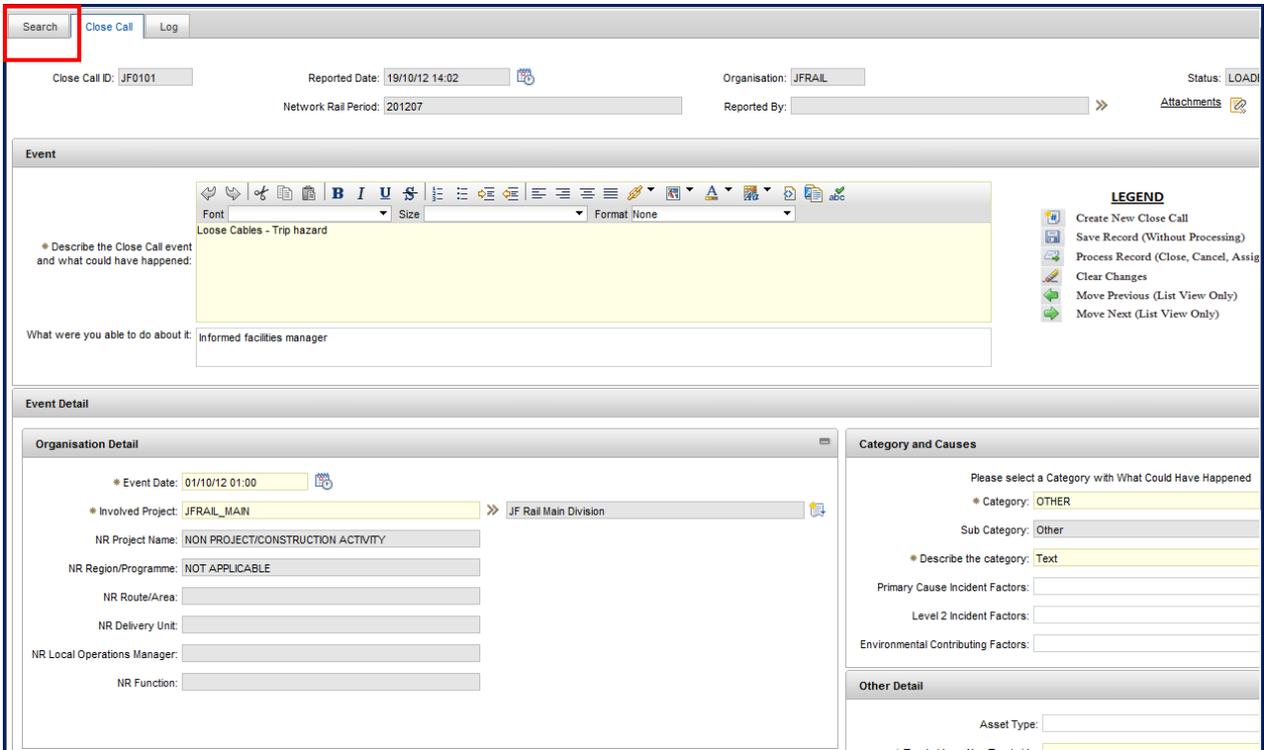You can view the close call record by clicking on the **'Close Call ID'** hyperlink from the search results table.

Figure 7

2.1.3 Returning to Search from a Close Call event record

After viewing a close call event record you can return back to the search screen by clicking on the **Search Tab.**
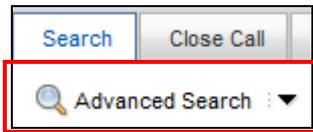
Figure 8

3 Advanced Search

The Advanced Search function allows you to filter your search by the fields that exist in a Close Call record (except for the free text fields. See section 2.2.1 on searching the free text fields).
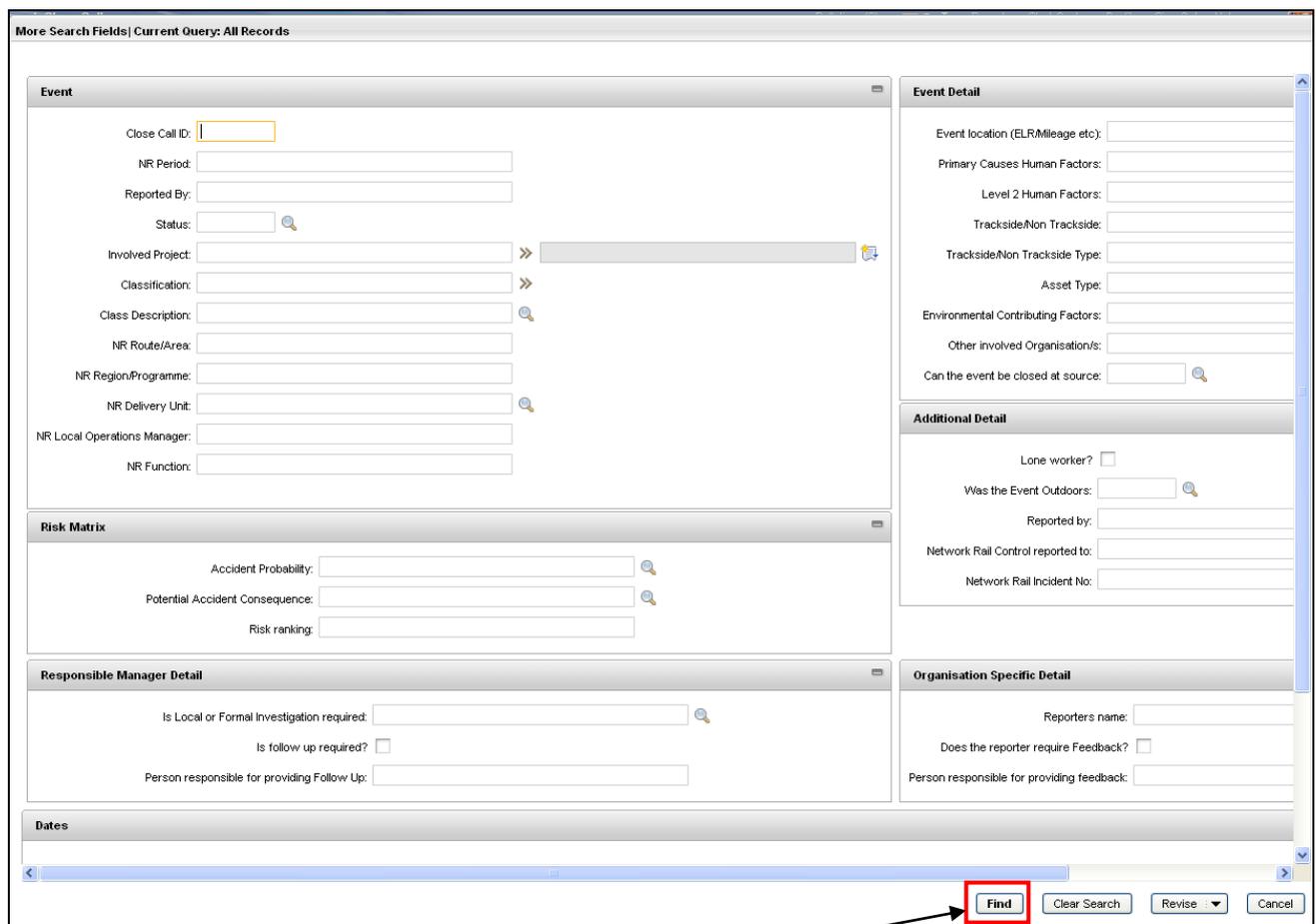
Access the Advanced Search via the hyperlink below the search tabs

Figure 9

The section headings reflect that of a Close Call entry screen. Use the **spy glass** and **>>** icons to select the data that you would like included in your search criteria.

Figure 10

Click on **'Find'** to obtain the search results.

4 Running Reports

There are a number of standard reports available within Close Call. These reports can be run at any time, or can be scheduled to run on a date that you specify. The reports can also be scheduled to be emailed directly from the system.

4.1 Start Centre Charts

There are two charts that will be available on your Start Centre that show **'Number of Close Call Events (Rolling 3 periods)'** and **'Number of Close Call Events by Risk Ranking (Rolling 3 periods)'.**

4.1.1 Viewing the Close Call Records

You can view the close call event records via the Start Centre charts by clicking on the graph bar
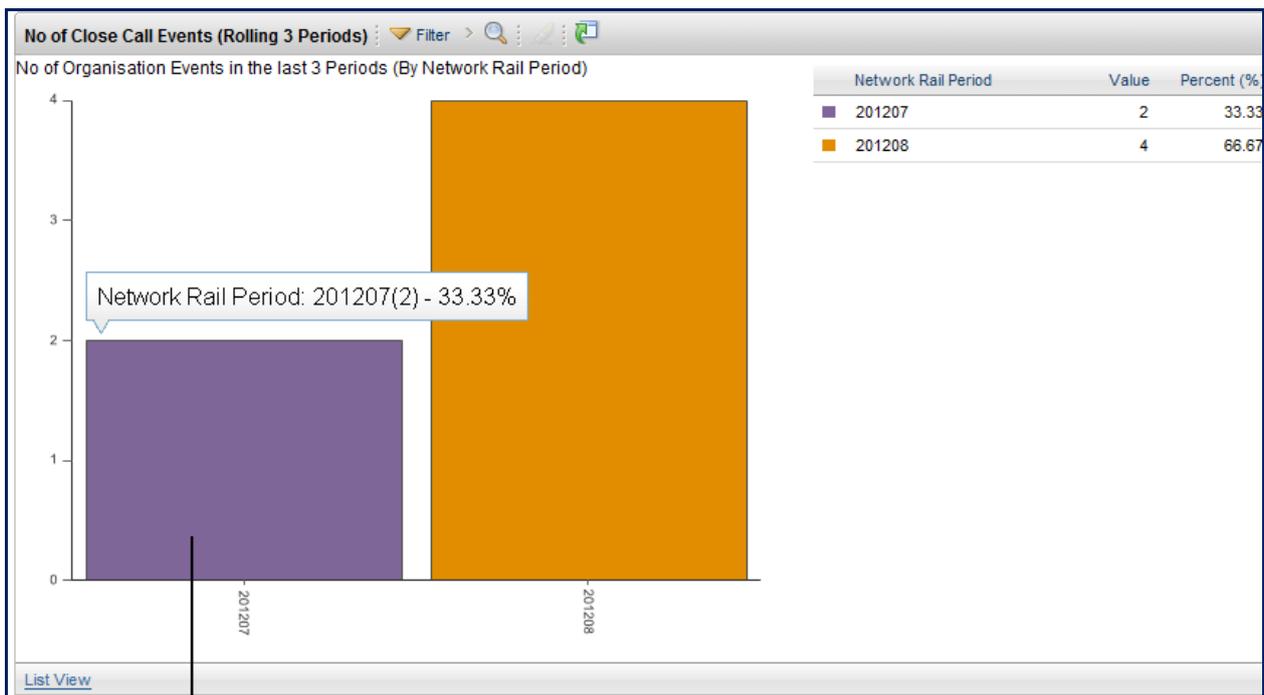
Figure 1

Figure 2

4.2 Running a Report

To view the reports available click on **'Search Close Call'** from the Start Centre.

Beware! If you select 'Run Reports' when you have placed filters in the Search/Advanced Search fields, the report will apply these filters to your report. For example: Applying a

filter in search/advanced search for a specific involved project will only return the data for that project when you run a report. To ensure your report includes all data, keep all the search fields blank before running a report.
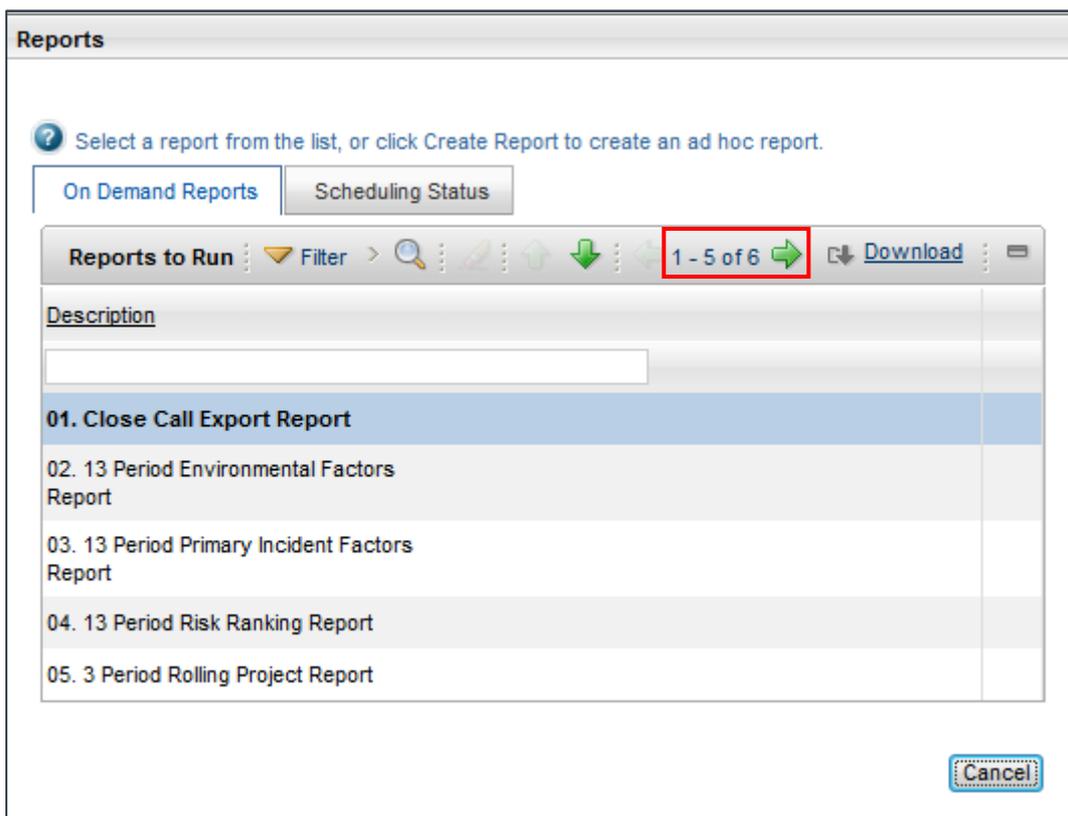
Click on the 'Select Action' drop down and '**Run Reports'.**

Figure 3
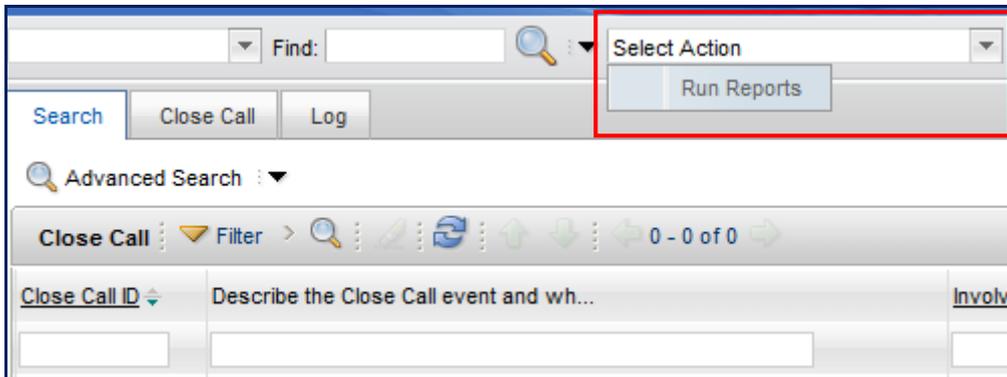
There are 6 reports available. Click on the report title you want to run.

Figure 4

4.2.1 Available Reports

01. Close Call Export Report
This report will export every field in every close call record returned by the search. You should use the Advanced Search prior to running the report if you wish to narrow down the result set to a particular Event Date range, Involved Project etc. (see section 3 for

Advanced Searching). The report output can be exported into MS Excel for analysis (see section 4.2.3 figure 9).

02. 13 Period Environmental Factors Report
This report provides the number of events entered under each environmental contributing factor, by period.

03. 13 Period Primary Incident Factors
This report provides the number of events entered under each primary cause incident factor, by period.

04. 13 Period Risk Ranking Report
This report provides the number of events entered by risk ranking (high, medium, low), by period.

05. 3 Period Rolling Project Report
This report provides some close call event information broken down by Involved Project. The details you get from this report are – *Close Call ID, Involved Project, Category, Primary Cause Incident Factors, Environmental Contributing Factors, Status.*

06. 13 Period Event Category Report
This report provides the number of events entered by event category, by period.

4.2.2 Report Scheduling Options

Figure 5
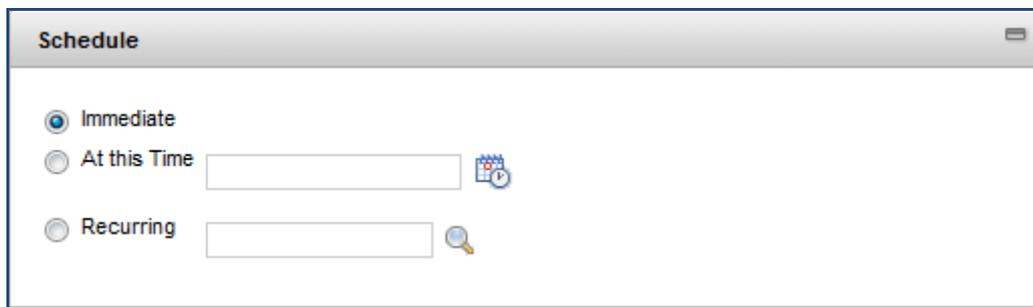
Immediate launches the Report Viewer and can then be exported to Word, PDF or Excel format.

At this Time allows the user to set a future date/time for the report to run.

Recurring allows the user to schedule a report to run repeatedly for a set duration, i.e. weekly, monthly etc. The report must be scheduled to email by completing the email fields. The report can be emailed in PDF or Excel format. It is advised to always have the report delivered as an email attachment rather than a file URL.

4.2.3 Running an immediate report

When running an immediate report, click on the radio button to the left of 'Immediate' and click **'submit'** (you do not need to specify the file type at this stage). The report will open in a 'Report Viewer' screen.

Figure 6

4.2.3.1 Report Viewer

If your report has more than 1 page of data, you can use the arrows to scroll through the data.

Click on the icons in the report header to toggle a table of contents, print the report, export the data to a CSV vile and export the report to another file format (PDF, Excel, Word).

Figure 7

Figure 8

Figure 9

Export Data: This allows you to extract parts of the data from the report and convert it to a CSV file. This is useful when analysing the data from the report.

Figure 10

Figure 11

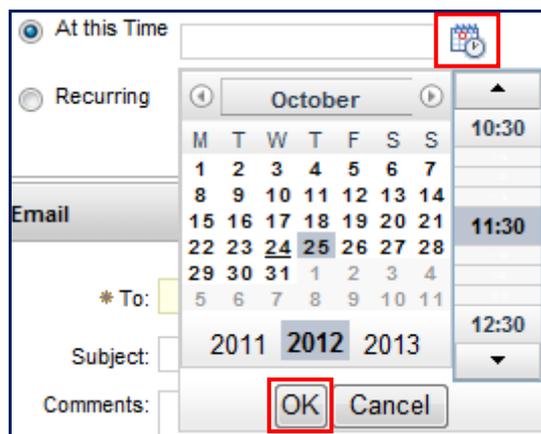**Export Report:** This icon will export the report into either Word, PDF or Excel.

Figure 12
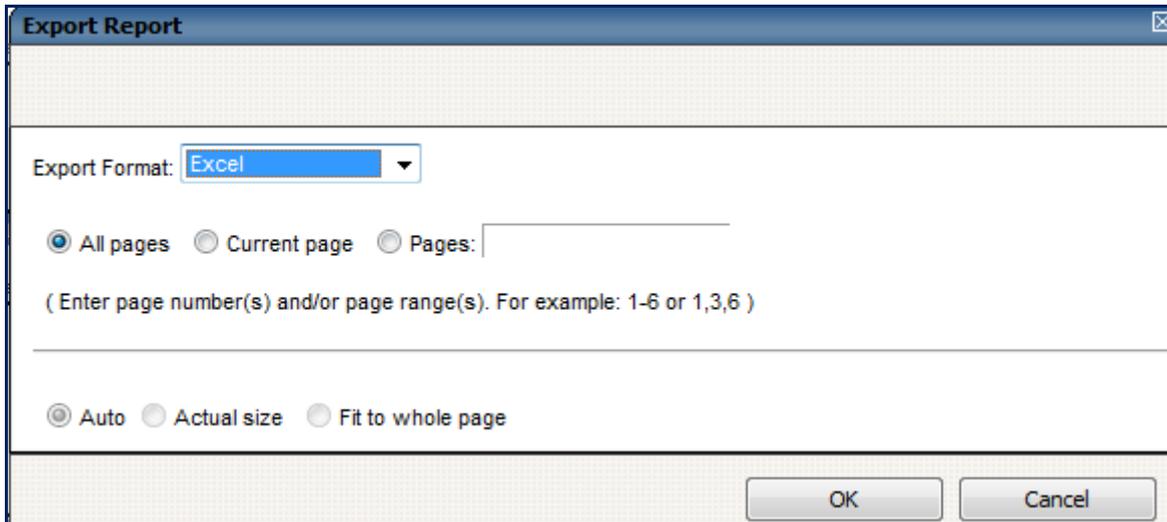
4.2.4 Scheduling a report to run at a specific time

Click on the radio button next to **'At this Time'** and then click on the calendar icon to select the date and time the report will run and click **'OK'**.

Figure 13

The Email **'To'** field will turn yellow and become mandatory. Enter the email address where you want the report to be sent, complete the optional email fields, select the file format and whether you want to the report to be sent as an attachment or as a URL within the email. Click **'Submit'.**

Figure 14

4.2.5 Setting up a Recurring report

You can schedule a report to run on a recurring basis. Click on the **'Recurring'** radio button and select the spyglass.

Figure 15

This will open a value screen for you to select what day/time the report will run and how often it will run.

Figure 16

There is a **'Date Preview'** box that will show you what dates the report will run on based on the criteria entered in the value fields.

The example above shows that the report will run at 17.30 on the last Friday every month.

Click **'OK'** to return to the report schedule and Email screen.

The recurring report values will be indicated as complete by the 'Recurring' field showing as **'Selected'.** Complete the email fields, indicating the file type and how you want the report to be attached to the email.

Figure 17

Click **'Submit'.**

You will receive a confirmation pop up to show that the recurring report has been successfully scheduled.

Figure 18

Click on **'Schedule Detail'** in the pop-up screen to see the scheduled report information. You can edit the settings for the report and delete the schedule here if required.

Figure 19

From the reports screen there is a tab to view the scheduling status of any recurring or timed reports. You can delete any scheduled reports you no longer require from this screen.

Figure 20