



ONEVIEW SERIES SIX

TASK MASTER: Expertly Filtered



Enterprise Workforce Planning, all-in-OneView



Welcome to OneView Task Master



Today's Webinar

- Team Introductions
- Aims of Series 6
- The third task: Filtering Data
- The many solutions
- 🏆 **The winner!**
- Coming Next

Housekeeping

1. **This Webinar will be recorded** and will be accessible from the [RLDatix G&C website](#)
2. **A copy of this slide deck will follow**, including details of the next webinar a few days after this event.
3. **Questions are welcomed** and any we cannot respond to during the webinar will be included in the slide deck
4. **We value your feedback.** If you have any suggestions or feedback following this webinar, or follow up questions, contact us oneview@rldatix.com
5. **Thank you** for taking time out of your busy day to watch this webinar. We hope you find it informative.

IMO Day of the Seafarer





Welcome to Series 6 of our OneView Webinars

**This series will focus on
smaller tasks and the best
way(s) of completing them.**

Did you complete Task #3 ?

Task #3

***What is the most elaborate and useful *'filter'* you have created and why is/was it so useful?**

We are looking for filters that do more than they were designed to do...work in ways that nobody had thought of...help a vast number of staff using OneView. Creative hats on, mouse and pointers to the ready...

*No conferring. The Task Master's decision is final!

OneView Filtering

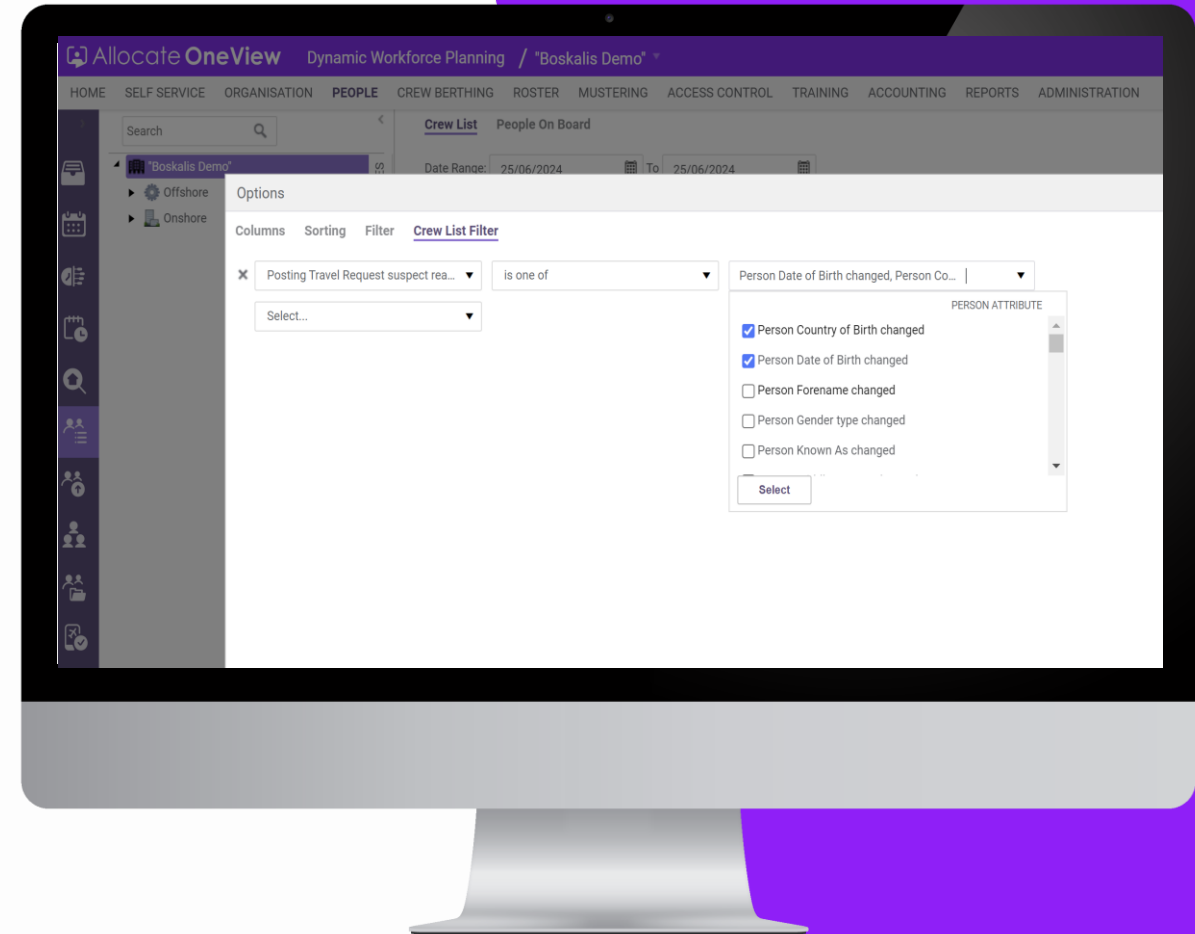
Features

- Default Filter
- Predefined Filters
- User-defined Filters
- Single Filters
- Multiple Filters



Capabilities

- Choose & Sort columns
- Filter on columns
- Context Filtering
- Save / Copy / Share
- Reset / Delete
- Convert predefined to user filter
- Set as Default / Clear
- Export to Excel (all / selected records)



How did the team do?

Creative Filtering

Filters are ubiquitous in OneView and provide users with the flexibility to create searches that return the records quickly based on the criteria they provide.

- **Crew List:** **Versatile filter** with the benefit of having an **explicit date range**
- **Criteria Filtering:** Available when setting up **Post & Person Groups**
- **Auditing:** User filters to **Audit Data** (e.g. user access, history tabs)
- **Multi-Filtering:** **Run filters Simultaneously** by grouping them together
- **Advanced Search:** **Schedule Shortcut** using filtering

Our Preferred Solution?



***Advanced Search Feature
with Multi-filters***

Planning Pools & Multi-Filters



- Many customers schedule their crew/staff by separating them into 'Planning Pools'
- Each Planner/Scheduler looks after their 'pool' of crew/staff
- Quite frequently, scheduling teams struggle to find the right person within their 'pool' and it can be useful to look at neighbouring pools to check availability
- This is scenario lends itself to 'Multi-Filters'
- Multi-filter can be set up to prioritise your own pool before extending the search to the wider planning pools.

Use colour coding to identify planning pools

The screenshot shows the Allocate OneView interface with a table of crew members. A red dashed box highlights a search filter, and a blue callout box points to it with the text "Search prioritises 'nearest' pools".

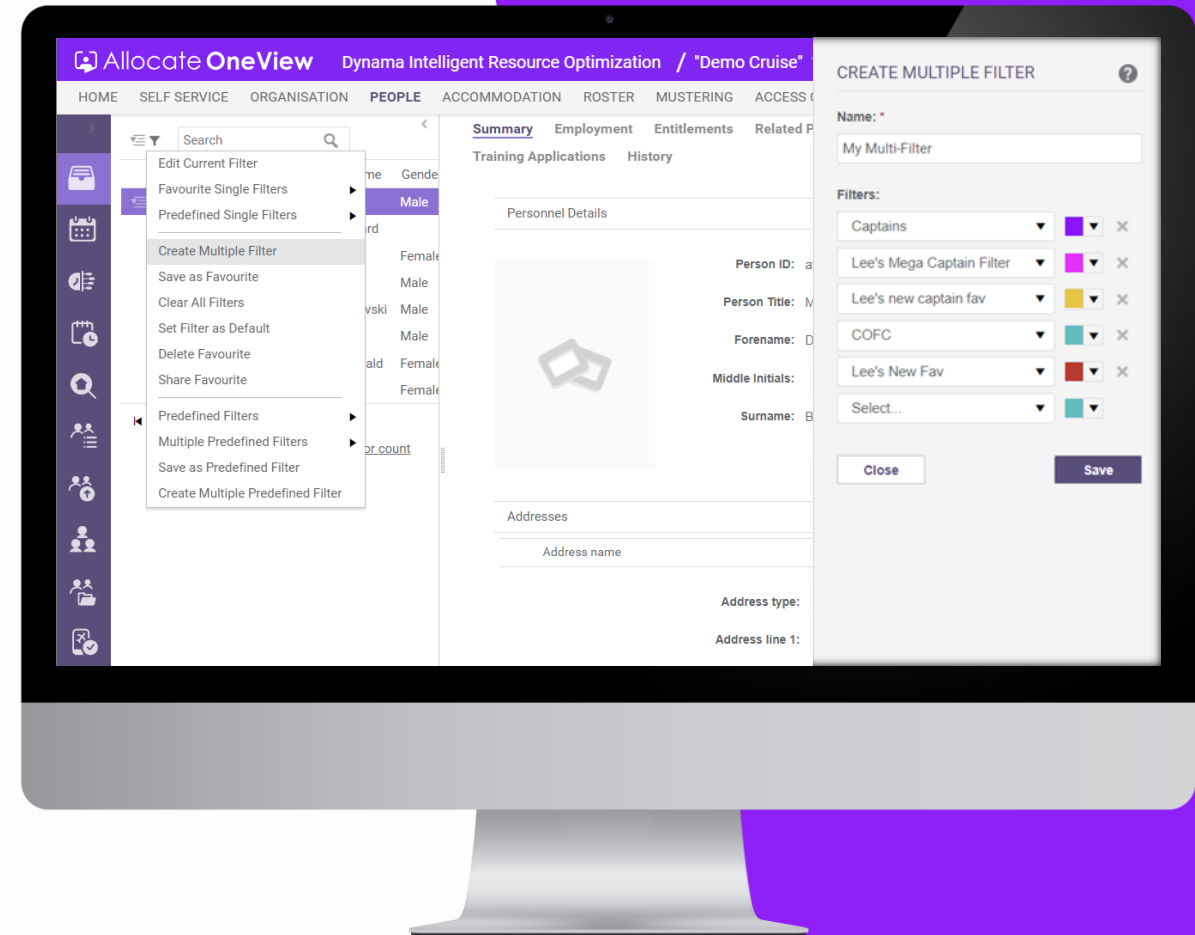
Test	Title	Start Date	End Date	Post Rank	Short Name	Post Type	Post Location	Post Number	Post Approval Status	COVID-19 Symptoms	Last COVID-19 Survey Date	Organis
A.5 Deck Cadet		01/01/2017	End of Time	CADET		Standard - Additional		005	Approved		20/01/2021	1. Deck
A.2 Chief Officer		01/01/2017	End of Time	COFC		Safe Manning - Additional		002	Rejected			1. Deck
A.1 Captain		01/01/2017	End of Time	CPT		Safe Manning - Additional		001	Approved			1. Deck
A.4 2nd Officer		01/01/2017	End of Time	2OFC		Safe Manning - Additional		004	Approved			1. Deck

Title	Name Details 1	Rank Short Name	Person Type	Date Of Birth	Gender	Place Of Birth	Country	Marital Status	Join Date	Leaving Date	Contract	Person Source
	Belle Grant	CPT	Full time	02/04/1978	Female		Germany	Single	19/02/2006	End of Time	Temporary Contr	Golden Ocean
	Jordanna Gamble	CPT	Full time	02/04/1978	Female		Bulgaria	Married	02/06/1996	End of Time	3m/1m	Golden Ocean
Mr	Buster Davies	CPT	Full time	11/12/2019	Male	fthfthf		Married	17/03/2007	End of Time	Temporary Contract	Golden Ocean
	Abdurahman Frederick	CPT	Full time	27/04/1975	Male		Germany	Single	09/12/1992	End of Time	4m/2m	Golden Ocean
	Kajal O'Gallagher	CPT	Full time	02/04/1978	Male		Philippines	Single	12/05/2001	End of Time	3m/1m	Golden Ocean
	Killian Talbot	CPT	Full time	02/04/1978	Male		Philippines	Married	14/12/2003	End of Time	Temporary Contract	Golden Ocean
Mr	James Smyth	CPT	Regular	03/03/1970	Female		United Kingdom	Married	17/08/2018	End of Time	Offshore Contract	Viking Recruitment
Mr	John Benn	CPT									6.6	Allocate Recruitment
	Mary Ann	CPT									4m/2m	Allocate Recruitment
	Philip Morgan	CPT	Full time	01/01/1980	Male	Haverfordwest	United Kingdom	Married	14/11/2023	End of Time	Temporary Contract	EMEA

Advanced Search Filtering

Using multi-filters for Advanced Searches

- 1) Click on the People > Schedule short cut
- 2) Click on the filter icon
 - Setup up your single filters by Editing the current filter, changing the columns, sort order and filters
 - Make sure you save each filter with a unique name.
- 3) Click on the filter icon again and select 'Create Multiple Filter'
- 4) In the slide out panel, enter a name
- 5) Select a single filter and choose a colour
- 6) Repeat step 5 for each single filter you wish to combine
- 7) Click Save. This will create the multi-filter
- 8) To activate, click on the filter icon and click on 'Favourite Multiple Filters' and select your filter.
- 9) You can also set this to default using the 'Set Default Filter' option.



Planning Pool Multi-Filter using Head Hunter



Allocate OneView Dynamic Workforce Planning / "RLDatix"

HOME SELF SERVICE ORGANISATION PEOPLE CREW BERTHING ROSTER MUSTERING ACCESS CONTROL TRAINING ACCOUNTING REPORTS ADMINISTRATION 07/06/2024

Unit: 1. Deck

Search

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	A.4 2nd Officer	01/01/2017	End of Time	20FC		Safe Manning - Additional		004	Approved			1. Deck

25 items 1 - 4 click for count

Post Schedule

A.1 Captain

CPT Kearns Abdurahman

May 2024 Jun 2024 Jul 2024 Aug 2024 Sep 2024 Oct 2024 Nov 2024

JUN 07, 2024

Search

Title	Name Details 1	Rank Short Name	Person Type	Date Of Birth	Gender	Place Of Birth	Country	Marital Status	Join Date	Leaving Date	Contract	Person Source
	Belle Grant	CPT	Full time	02/04/1978	Female		Germany	Single	19/02/2006	End of Time	Temporary Contract	Golden Ocean
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25 items 1 - 10 click for count

Posting Requirements Details Competences Travel Documents

CPT Grant

May 2024 Jun 2024 Jul 2024 Aug 2024 Sep 2024 Oct 2024

JUN 07, 2024

Search prioritises 'nearest' pools

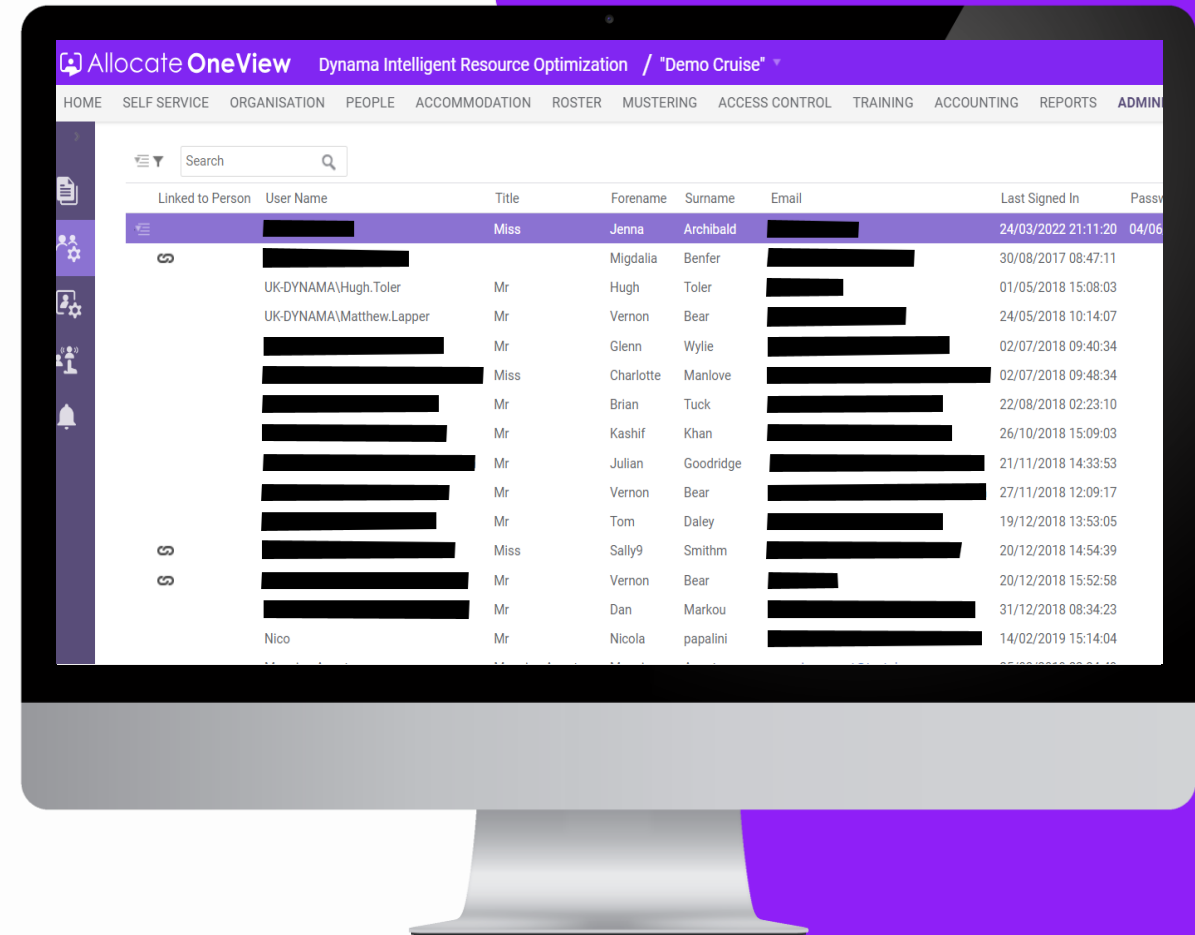
User Account Filtering

Using Filtering to audit account logins

To show the currently enabled internal (i.e. not Self-Service) users in the order of their last login. You can reverse the sort order to see who hasn't logged in for a long time.

- 1) Navigate to Administration > Manage Accounts
- 2) Click on the Filter icon and 'Edit Current Filter'
- 3) Set the Sort Order to be "Last Signed In" in reverse order
- 4) Filters to use:
 - 1) Enabled = True
 - 2) Username Ends With [your domain]
 - 3) Last Signed In At <> 01/01/1900

Note: user must be member of "Human Resources" or "System Administrators". Any user with access to history tabs can create their own auditing filters for data changes





David Nightingale

Is the Official OneView
Task Master 3 Winner!





Task #4

Tell us about the most useful Custom Attribute(s) you've thought up / configured / implemented.

We are looking for inventive ways of using custom attributes that benefit customers and are easy to implement... with so many custom attributes to choose from, we are looking for the best of the best (and something more than a text field).

This task is open to anyone and there are prizes to be won, so what do you have to lose? Send your solution (with steps to reproduce) to oneview@rldatix.com . **Closing Date: 13th September 2024**

Voice of the Customer update



- **Meeting took place on 21st May 2024**
 - OneView Roadmap for FY25
 - Demonstration of Responsive Self-Service
 - Well received
 - Next Steps



Customer volunteers requested for Responsive self-service evaluation trials – please email oneview@rldatix.com

Coming next...



Our next webinars/meetings

- **8th August – Training Administration**

11am EST / 4pm UK / 5pm EU / 7pm UAE

- **25th September – Task Master #4**

11am EST / 4pm UK / 5pm EU / 7pm UAE

Thank you for watching

OneView Webinar Feedback

Are you signed up for the series and have you been receiving your invites?

Do you have any questions about today's webinar or would like an edited copy of today's webinar for training purposes?

Would you like further information about the features demonstrated today?

Or any feedback for the team on the webinars or future topics?

Contact us or email: oneview@rldatix.com

OneView Webinars



Series 5

(click the link to watch the webinar)

- [Mastering Filters](#)
- [Communication Centre](#)
- [Work Plan Enhancements](#)
- [Mode of Operation](#)
- [Dashboards made easy](#)
- [Making Your Case \(Case Management\)](#)

Series 6

(click the link to watch the webinar)

- [Suitably Skilled](#)
- [Perfectly Reported](#)
- [Expertly Filtered](#)



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