



# ONEVIEW SERIES SIX

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**TASK MASTER:** Perfectly Reported



# Welcome to OneView Task Master



## Today's Webinar

- Team Introductions
- Aims of Series 6
- The 2<sup>nd</sup> task: Perfectly Reported
- Task 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](mailto:oneview@rldatix.com)
5. **Thank you** for taking time out of your busy day to watch this webinar. We hope you find it informative.



## Welcome to Series 6 of our OneView Webinars

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

**Task #2 ?**

# Task #2

**\* Create a scheduling report for your Manager, who needs it within the hour. It must contain the names of those scheduled, the position, start/end dates and the status of the posting.**

...Oh and you want to impress your manager by making it easy to configure and use as possible – Good Luck!

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

# How did the team do?

## There were multiple routes to success

Starting with the most popular option we selected these five:

- **All about the crew:** **Crew List** shortcut using date range & filtering
- **Printable Timelines:** User created **Person Diary Report**
- **Report Building:** Create and publish a Stimulsoft **Management Report**
- **Skills Advantage:** Use the **Skills Matrix** and include posting info
- **Schedules or Schedules:** **Schedule Shortcut** using filtering

*(Filtering can be used on numerous shortcuts to return basic posting information)*

# Our Preferred Solution?

***Ease of use / wide application:***

**Crew List** shortcut using date range & filtering

***Visually pleasing / Information rich:***

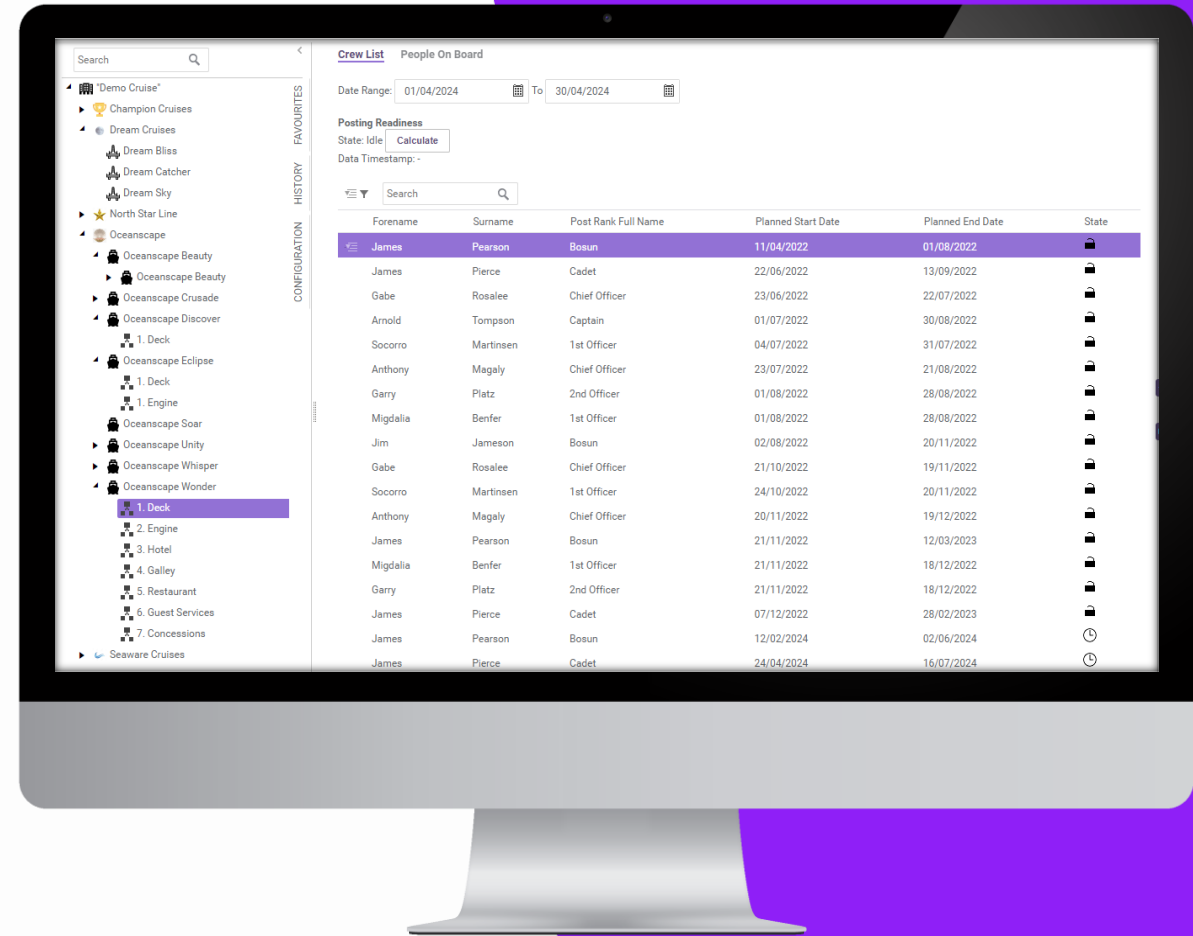
User created **Person Diary Report**

Use the **Skills Matrix** and include posting info

# Crew List

## Easy to configure, and information rich:

- 1) Navigate to People > Crew List
- 2) Select the required Unit from the list on the left-hand side of the screen
- 3) Select the required date range
- 4) From filter funnel menu, select Edit Current Filter
- 5) Select the columns of information you require
- 6) Optionally, select a Sort Order and any additional column or context filtering required.
- 7) Click Set to see your filtered data.
- 8) Select 'Export to Excel' for emailing/printing.



The screenshot displays the 'Crew List' interface. On the left, a tree view shows the hierarchy of units, with '1. Deck' selected under the 'Oceanscope Wonder' unit. The main area shows a table of crew members with columns for Forename, Surname, Post Rank Full Name, Planned Start Date, Planned End Date, and State. The table is filtered for the date range 01/04/2024 to 30/04/2024. The first row is highlighted in purple.

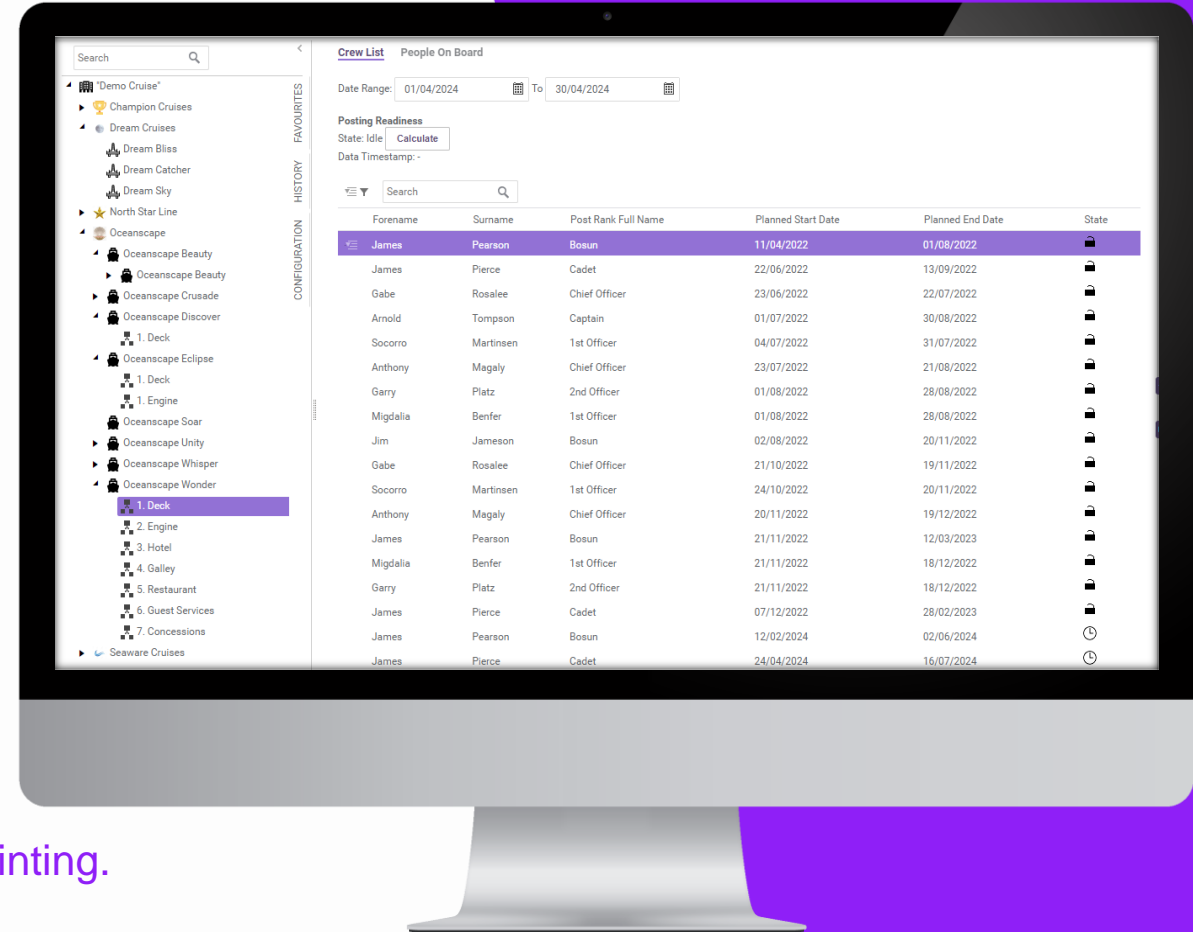
Forename	Surname	Post Rank Full Name	Planned Start Date	Planned End Date	State
James	Pearson	Bosun	11/04/2022	01/08/2022	🔒
James	Pierce	Cadet	22/06/2022	13/09/2022	🔒
Gabe	Rosalee	Chief Officer	23/06/2022	22/07/2022	🔒
Arnold	Tompson	Captain	01/07/2022	30/08/2022	🔒
Socorro	Martinsen	1st Officer	04/07/2022	31/07/2022	🔒
Anthony	Magaly	Chief Officer	23/07/2022	21/08/2022	🔒
Garry	Platz	2nd Officer	01/08/2022	28/08/2022	🔒
Migdalia	Benfer	1st Officer	01/08/2022	28/08/2022	🔒
Jim	Jameson	Bosun	02/08/2022	20/11/2022	🔒
Gabe	Rosalee	Chief Officer	21/10/2022	19/11/2022	🔒
Socorro	Martinsen	1st Officer	24/10/2022	20/11/2022	🔒
Anthony	Magaly	Chief Officer	20/11/2022	19/12/2022	🔒
James	Pearson	Bosun	21/11/2022	12/03/2023	🔒
Migdalia	Benfer	1st Officer	21/11/2022	18/12/2022	🔒
Garry	Platz	2nd Officer	21/11/2022	18/12/2022	🔒
James	Pierce	Cadet	07/12/2022	28/02/2023	🔒
James	Pearson	Bosun	12/02/2024	02/06/2024	🕒
James	Pierce	Cadet	24/04/2024	16/07/2024	🕒

# Creating a Person Diary Report

## Available to non-admin users of OneView

- 1) Navigate to Reports > Person Diary
- 2) Click context menu top left of the screen and select 'Add Person Diary Report'
- 3) In the slide out form, enter the report options:  
*Report name, unit(s) to include, **date range\***, person information (e.g. postings, non-effectives), choose who can run the report (private = only you), finally choose additional to display or print*
- 4) Click save. You can now edit the settings & report layout:
- 5) Optionally, enter filtering criteria, set headers & footers, and change the timeline labels (e.g. scheduling dates, post title, vessel name etc).
- 6) Save or Save As to create a new report from existing.

\*You can also set the date range on the outcomes tab before printing.



The screenshot displays the 'Crew List' report in the OneView software. The interface includes a search bar at the top left, a date range selector (01/04/2024 to 30/04/2024), and a 'Posting Readiness' section with 'State: Idle' and a 'Calculate' button. The main area features a table with columns for Forename, Surname, Post Rank Full Name, Planned Start Date, Planned End Date, and State. The table lists crew members for various vessels, including James Pearson, Gabe Rosalee, Arnold Tompson, Socorro Martinsen, Anthony Magaly, Garry Platz, Migdalia Benfer, Jim Jameson, Gabe Rosalee, Socorro Martinsen, Anthony Magaly, James Pearson, Migdalia Benfer, Garry Platz, James Pierce, James Pearson, and James Pierce.

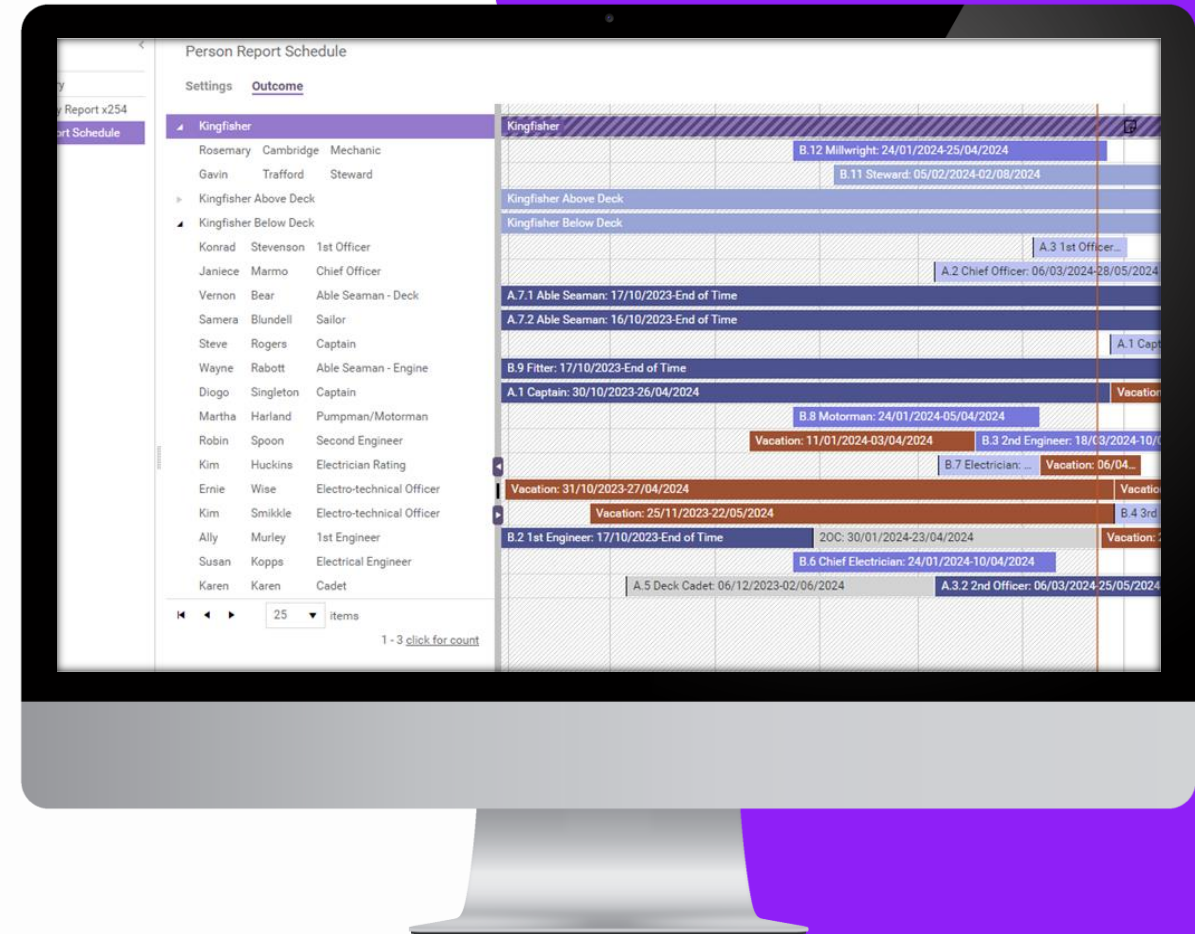
Forename	Surname	Post Rank Full Name	Planned Start Date	Planned End Date	State
James	Pearson	Bosun	11/04/2022	01/08/2022	🔒
James	Pierce	Cadet	22/06/2022	13/09/2022	🔒
Gabe	Rosalee	Chief Officer	23/06/2022	22/07/2022	🔒
Arnold	Tompson	Captain	01/07/2022	30/08/2022	🔒
Socorro	Martinsen	1st Officer	04/07/2022	31/07/2022	🔒
Anthony	Magaly	Chief Officer	23/07/2022	21/08/2022	🔒
Garry	Platz	2nd Officer	01/08/2022	28/08/2022	🔒
Migdalia	Benfer	1st Officer	01/08/2022	28/08/2022	🔒
Jim	Jameson	Bosun	02/08/2022	20/11/2022	🔒
Gabe	Rosalee	Chief Officer	21/10/2022	19/11/2022	🔒
Socorro	Martinsen	1st Officer	24/10/2022	20/11/2022	🔒
Anthony	Magaly	Chief Officer	20/11/2022	19/12/2022	🔒
James	Pearson	Bosun	21/11/2022	12/03/2023	🔒
Migdalia	Benfer	1st Officer	21/11/2022	18/12/2022	🔒
Garry	Platz	2nd Officer	21/11/2022	18/12/2022	🔒
James	Pierce	Cadet	07/12/2022	28/02/2023	🔒
James	Pearson	Bosun	12/02/2024	02/06/2024	🕒
James	Pierce	Cadet	24/04/2024	16/07/2024	🕒



# Printing a Person Diary Report

## Printable timeline view of posting information

- 1) Navigate to Reports > Person Diary
- 2) From the list on the left-hand-side, click on the report you wish to print
- 3) In the right-hand-side, you can adjust the report settings and such as: *Report name, unit(s) to include, date range, person information (e.g. postings, non-effectives) & notes, add additional filtering or change footers & headers*
- 4) Click save or save as (new report) to save any changes
- 5) At the top, click the outcome tab to preview the timeline
- 6) You can make adjustments using the floating timeline menu on the right-hand-side (zoom in/out/view date etc)
- 7) Click to print on the floating menu to select your printer and page layout.
- 8) Finally, click the print button to print the report.



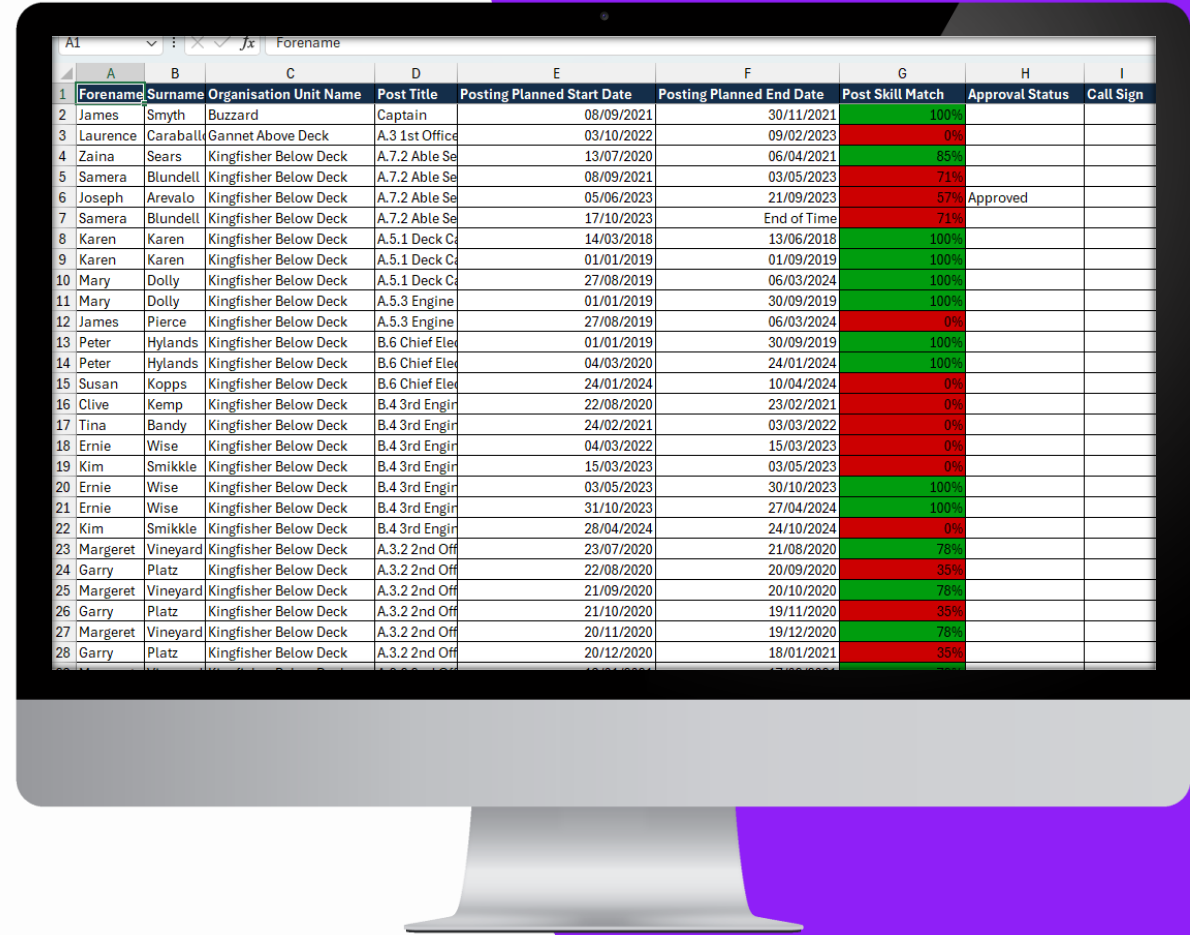
# Questions?

Question	Answer
<b>Can you save Diary Reports and re-use them?</b>	Yes, when you create a Diary Report, it appears in the list on the left-hand-side. If the report is for your own use, set the report state to 'Private'.
<b>Can you create templates?</b>	Each Diary Report is, in effect, a template. To duplicate a report, select the report in the list, change its name and click 'Save as'. You cannot have two diary reports with the same name.
<b>How do I delete Diary Reports that I've created?</b>	There is a context menu for each Diary report in the left-hand-side list. Click the context menu and select 'Delete'

# Skills Matrix

## More than just skills information...

- 1) Navigate to Organisation > Structure
- 2) Click on the unit you wish to report on and select Reports > Skills Matrix (at the bottom of the menu)
- 3) On first page, choose the date range and scope of the report (dates/units) and click next
- 4) Choose the ranks/grades to include and click next
- 5) Choose the columns of information you wish to display (remember: you can exclude the individual skills by removing the 'skills' the displayed column) and click next
- 6) Set any matching options and save your change
- 7) Click the generate button to create and download the MS Excel report.



	A	B	C	D	E	F	G	H	I
1	Forename	Surname	Organisation Unit Name	Post Title	Posting Planned Start Date	Posting Planned End Date	Post Skill Match	Approval Status	Call Sign
2	James	Smyth	Buzzard	Captain	08/09/2021	30/11/2021	100%		
3	Laurence	Caraball	Gannet Above Deck	A.3 1st Office	03/10/2022	09/02/2023	0%		
4	Zaina	Sears	Kingfisher Below Deck	A.7.2 Able Seaman	13/07/2020	06/04/2021	85%		
5	Samera	Blundell	Kingfisher Below Deck	A.7.2 Able Seaman	08/09/2021	03/05/2023	71%		
6	Joseph	Arevalo	Kingfisher Below Deck	A.7.2 Able Seaman	05/06/2023	21/09/2023	57%	Approved	
7	Samera	Blundell	Kingfisher Below Deck	A.7.2 Able Seaman	17/10/2023	End of Time	71%		
8	Karen	Karen	Kingfisher Below Deck	A.5.1 Deck Crew	14/03/2018	13/06/2018	100%		
9	Karen	Karen	Kingfisher Below Deck	A.5.1 Deck Crew	01/01/2019	01/09/2019	100%		
10	Mary	Dolly	Kingfisher Below Deck	A.5.1 Deck Crew	27/08/2019	06/03/2024	100%		
11	Mary	Dolly	Kingfisher Below Deck	A.5.3 Engine Room	01/01/2019	30/09/2019	100%		
12	James	Pierce	Kingfisher Below Deck	A.5.3 Engine Room	27/08/2019	06/03/2024	0%		
13	Peter	Hylands	Kingfisher Below Deck	B.6 Chief Electrician	01/01/2019	30/09/2019	100%		
14	Peter	Hylands	Kingfisher Below Deck	B.6 Chief Electrician	04/03/2020	24/01/2024	100%		
15	Susan	Kopps	Kingfisher Below Deck	B.6 Chief Electrician	24/01/2024	10/04/2024	0%		
16	Clive	Kemp	Kingfisher Below Deck	B.4 3rd Engineer	22/08/2020	23/02/2021	0%		
17	Tina	Bandy	Kingfisher Below Deck	B.4 3rd Engineer	24/02/2021	03/03/2022	0%		
18	Ernie	Wise	Kingfisher Below Deck	B.4 3rd Engineer	04/03/2022	15/03/2023	0%		
19	Kim	Smikkle	Kingfisher Below Deck	B.4 3rd Engineer	15/03/2023	03/05/2023	0%		
20	Ernie	Wise	Kingfisher Below Deck	B.4 3rd Engineer	03/05/2023	30/10/2023	100%		
21	Ernie	Wise	Kingfisher Below Deck	B.4 3rd Engineer	31/10/2023	27/04/2024	100%		
22	Kim	Smikkle	Kingfisher Below Deck	B.4 3rd Engineer	28/04/2024	24/10/2024	0%		
23	Margaret	Vineyard	Kingfisher Below Deck	A.3.2 2nd Officer	23/07/2020	21/08/2020	78%		
24	Garry	Platz	Kingfisher Below Deck	A.3.2 2nd Officer	22/08/2020	20/09/2020	35%		
25	Margaret	Vineyard	Kingfisher Below Deck	A.3.2 2nd Officer	21/09/2020	20/10/2020	78%		
26	Garry	Platz	Kingfisher Below Deck	A.3.2 2nd Officer	21/10/2020	19/11/2020	35%		
27	Margaret	Vineyard	Kingfisher Below Deck	A.3.2 2nd Officer	20/11/2020	19/12/2020	78%		
28	Garry	Platz	Kingfisher Below Deck	A.3.2 2nd Officer	20/12/2020	18/01/2021	35%		



# Michal Ondrusik

Is the Official OneView  
Task Master 2 Winner!



# 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...

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](mailto:oneview@rldatix.com) . **Closing Date: 12<sup>th</sup> June 2024**

# Coming next...



## Our next webinars/meetings

- **8<sup>th</sup> May – Voice of the Customer Update**  
*11am EST / 4pm UK / 5pm EU / 7pm UAE*
- **25<sup>th</sup> June – Task Master 3: Expertly Filtered**  
*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](mailto: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 *(coming soon)*





## All-inOneView



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