



ONEVIEW SERIES SIX

TASK MASTER: Suitably Skilled



Welcome to OneView Task Master



Today's Webinar

- Team Introductions
- Aims of Series 6
- The first task: Suitably Skilled
- 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.



Welcome to Series 6 of our OneView Webinars

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

Task #1 ?

Task #1

***Find me someone who is skilled and qualified for Advanced Firefighting**

Extra marks if you can do this with the fewest clicks, whilst making it available to the widest audience

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

How did the team do?

The team found five main ways of completing this task

Most started from the Personnel Management shortcut and Sam will demonstrate the top two answers:

- **Personal approach:** Create a person filter that filters on Person Competence(s)
- **Group hugs:** Create a filtered group that shows who has the Competence(s)
- **Trusting approach:** Run the skills matrix and hope it returns someone
- **Let's work this:** Use Head Hunter, select a post and filter on competence
- **Let's Not:** Use self-service and add the competence to your own record (**cheating!**)

The Winning Solution is

- **Personal approach:** Create a person filter that filters on Person Competence(s)
- ✓ **Group hugs:** Create a filtered group that shows who has the Competence(s)
 - Groups, once created are automatically available to any OneView user with access to the shortcut and group/type
 - Adding personnel as members of the group ensures they are continuously evaluated against the criteria
 - If any member of the group no longer matches the group criteria, an icon appears in the list next to their name
 - Anyone that is not a member but matches the criteria will appear in the missing members list
 - So this is the best way of find and keeping track of categories of skilled staff in scenarios where a list is needed quickly
- **Trusting approach:** Run the skills matrix and hope it returns someone
- **Let's work this:** Use Head Hunter, select a post and filter on competence
- **Let's Not:** Use self-service and add the competence to your own record (cheating!)

Demonstration

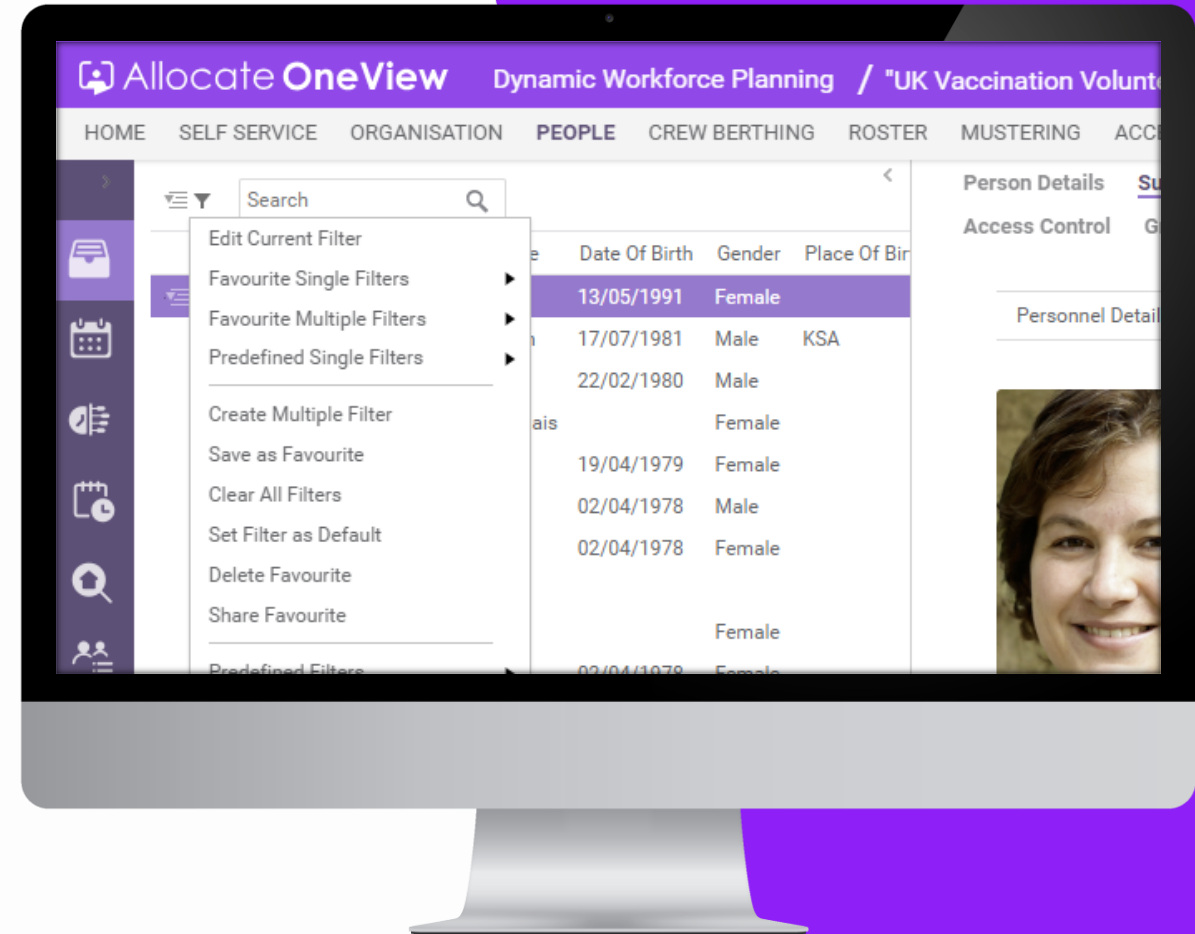
Solution 1

- Filtering on a list
- Choosing the Filter Criteria
- Making the output available to others


Solution 2

- Filtering on a group
- Enabling the Filter Criteria
- Adding and removing from groups

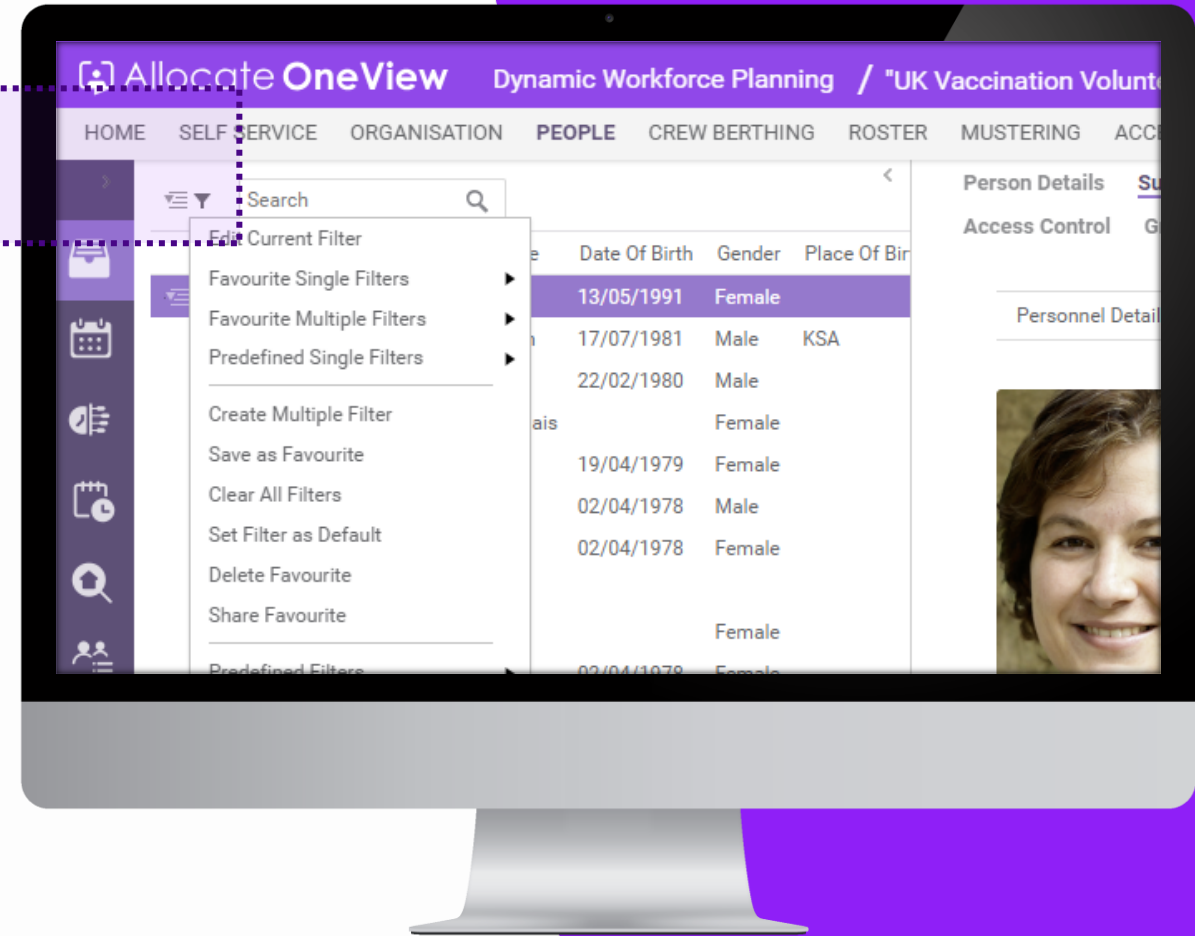
A step-by-step guide is provided on the next two slides



Filtering in Lists

1. Click "People" menu
2. Select "Personnel Management" shortcut
3. Click on the Filter Icon 
4. Click "Clear all Filters"
5. Select "Edit Current Filter"
6. Change tab to "People Filter"
7. Click "Select", scroll and pick "Person Competence"
8. Click "Select" in second box, select "has competence"
9. Click "Select" in third box and scroll/expand to find the Safety Skills group and tick the box to select one
10. Click the "Set" button on the Edit Filter and the list will be filtered to show those that have the competence.

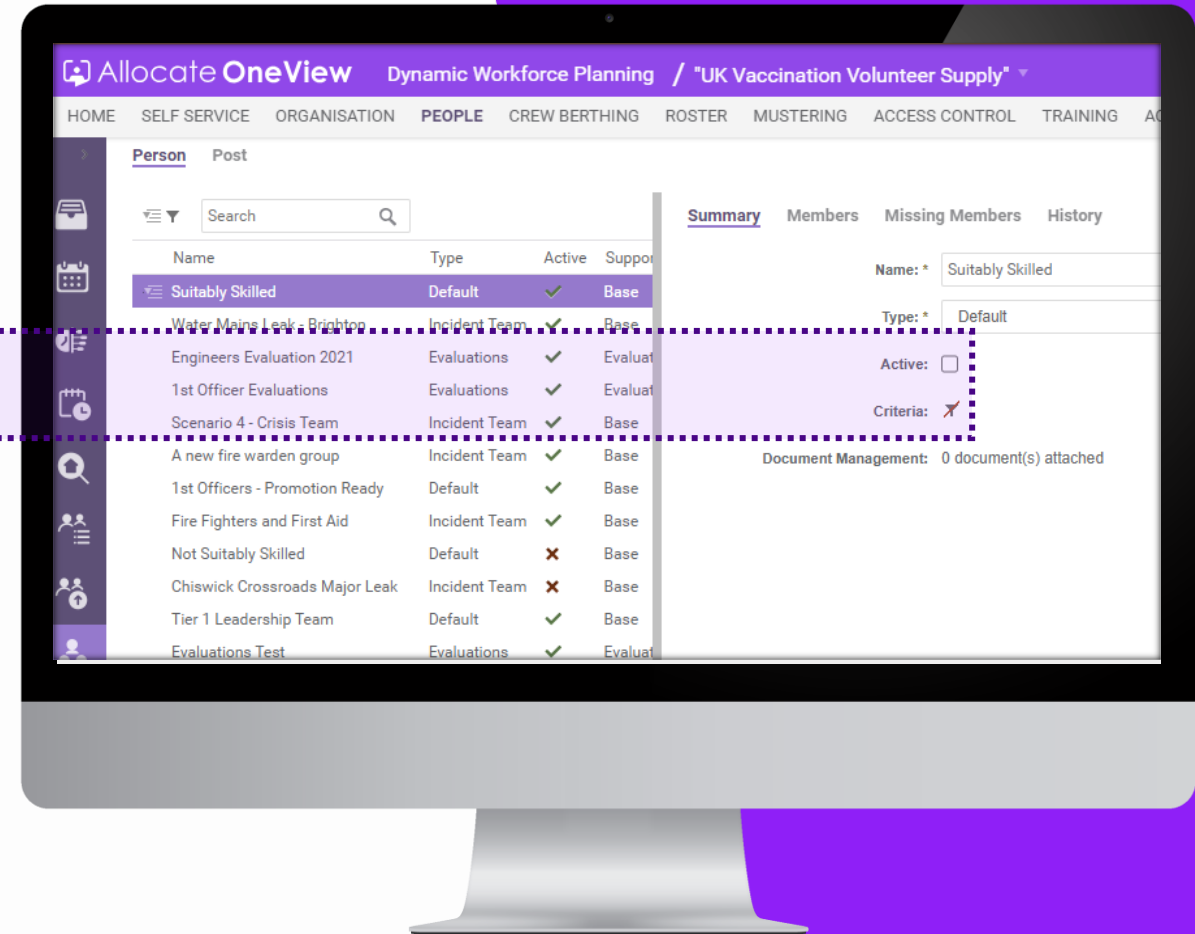
Let demonstrate this approach and how to save, set, share Filters and setup a pre-defined filter



Using Groups to Filter

1. Click "People" menu
2. Select "Person Groups"
3. Click the top action button
4. Select "Add New" from the menu
5. Enter Name of your search
6. Select Group Type (e.g."Default")
7. Click "save" to save the new person group
8. Click on the Criteria Filter
9. Click on the People Filter tab
10. Click "Select", scroll and pick "Person Competence"
11. Click "Select" in second box, select "has competence"
12. Click "Select" in third box and scroll/expand to find the "Safety Certifications" and tick the box to select.
13. Click the "Set" button on the Edit Filter
14. Click "Save" to update the group and you will see matching records displayed under "Missing Members"

More clicks but the person group can be viewed by anyone with access to the Person Group shortcut





Oliver Birtwistle

Congratulations Oli!





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!

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: 19th April 2024**

Coming next...



Our next webinars/meetings

- **23rd April – Task Master 2: Perfectly Reported**

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

- **May – Voice of the Customer Update**

Date & Time to be confirmed

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



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