

Working as One group applies to all Clients

Clients group applies to a specific Client

Working AS ONE

J. Kropman

Logout

Working As One Admin

Powered by KRC

Clients

Working as One

Working AS ONE

Settings for all clients.

Companies

Attendee types

Company categories

WaO Departments

Growth classes

Job categories

Statuses

Countries

Provinces / states

Scorecard types

Line items

Scorecard sections

Notification Templates

System settings

Assessment types

WaO Resource categories

WAO Resources

Working AS ONE

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Clients

Working as One

Company Name

Enercare Solutions

People

Strength assessments

Performance reviews

Development plans

Values

Departments

Job descriptions

Qualifications

Financial statements

Sections

Categories

Line items

Meeting types

Sections

Topics

Meeting schedule

Progress notes

Scorecards

Resource categories

Resources

▼ Default sort column.

Companies	Name	City	Company Category
Attendee types	Attendee Title	Department?	
Company categories	Category Name	Ordered list.	
WaO Departments	Department Name	Ordered list.	
Growth classes	Milestone Type Title	Ordered list.	
Job categories	Job Category Name	Ordered list.	
Statuses	Status Title		
Countries	Country Name		
Provinces / states	By Country	Province/State Name	

Notification Templates	Notification Type	Subject or Title	Delivery Method
System settings	Setting	Value	

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Due date change reasons

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Column grid of data, column alignment
May allow ordering of rows
May sort/reverse by column (if no ordering)
Click row to select and Edit
Alternating row colors preferred.
Some lists can have checkbox selection column

Columns of formatted data
(text, date, currency)

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Go to that employooyee's dashboard

▼ Default sort column.

People	Employee #	Full Name	Owner	Manager	Employee	3 rd Party
Strength assessments	Assessment Date	Period From	Period To	View	Request	
Performance reviews	Appraisal Date	Period From	Period To	View	New	
Development dashboard						

Submit a strength assessment request.

Values	Value Title	Type	Ordered list.
Departments	Company Department	WaO Department	Ordered list.
Job descriptions	Job Title	Company Department	Category
Qualifications	By Job Description	Class	Qualification

Financial statements	Meeting Title	Attendee Type	Department			
Sections	By Meeting Type	Section Title	Department	Dur	Ordered list.	
Topics	By Meeting Type then By Section	Topic Title	Fin?	S/C?	P/AI?	Ordered list.
Meeting schedule						
Progress notes						

Scorecards

Resource categories

Resources



▼ Default sort column.

Companies	Name ▼	City	Company Category
Attendee types	Attendee Title ▼	Department?	
Company categories	Category Name	Ordered list.	
WaO Departments	Department Name	Ordered list.	
Growth classes	Milestone Type Title	Ordered list.	
Job categories	Job Category Name	Ordered list.	
Statuses	Status Title		
Countries	Country Name ▼		
Provinces / states	By Country	Province/State Name ▼	
Scorecard types	Scorecard Name ▼	Owner	Manager
Line items	By Scorecard Type	Employee	Department
Scorecard sections	Item Name ▼	Section	Row
Notification Templates	Section Name ▼	Col	
System settings	Notification Type	Subject or Title ▼	Delivery Method
	Setting ▼	Value	

Admin – Client Settings – Single object data view


May allow Delete, Add New
Cancel returns to list

If editing, show value
Otherwise says "New"





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**Attendee types** > Owners 

Settings for all clients.

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Title


Department Attendance ☐


OK


CANCEL

Admin – Client Settings – Related Objects data view

May allow Delete, Add New
Cancel returns to list

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**Countries > Canada**

Name





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**Countries > Canada > Provinces & States**


Name	Abrv.
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Admin – Client Settings – More complex related objects data view



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Enercare Solutions ☒

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Resources



 Company Name

Meeting types > Executive Monthly 



Title

Attendee Type ☒

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Executive Monthly > Sections  

Previous Action Items	Manager	10 min
Review Financials	Manager	10 min
Banking Review	Bookkeeping	10 min
Accounting Review	Bookkeeping	10 min


Executive Monthly > Sections > Banking Review > Topics  


Reconciliation progress report – Cash Flow

Admin – Client Settings – Single object data view

May allow Delete, Add New
Cancel returns to list

If editing, show value
Otherwise says "New"

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Clients

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Executive Monthly > Sections > Banking Review > Reconciliation progress report
– Cash Flow

Company Name

Reconciliation progress report – Cash Flow

Review Financials?

Review Success/Challenge?

Review Projects/Milestones?

OK

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