Karbon Building Blocks Work Template Guidance

This template has been designed to provide all the required structural components of a template to ensure real time work visibility.

All you have to do is follow the guidance provided to make adjustments based on your needs.

How to use this template

Details Tab

Description

Complete the information below:

Start date =
Due date =
Initial assignee = Preparer

Preparer is set as the initial assignee because the first section is owned by them in the template (the task is assigned to them). If you change this then also change the initial assignee here.

This information helps users to understand how to set the above fields when creating new work from a template.

Work Type

A work type is needed for every service that needs to be reported on in isolation via the work dashboard.

Amend the Work Type to the most suitable. If you need to add a new work type [follow this guidance](#).

Work Team

The work team will automatically populate based on the roles that are involved in the Budget Estimates, Assigned Tasks and Automators.

The Team Member should be unassigned. This will be populated when you [create work from a template](#) and assign the role to a team member.

Tasks Tab - Sections

The template contains sections that relate to Karbon's default status', these are:
- Ready to Start
- Send client requests
- Kick-off / Setup
- Prep
- Process
- Review
- Revise
- Final review
- File
- Follow-up
- Waiting for info
- Waiting for client
- Completed
- Billed

As tasks are completed in each section, the status of the work will update to the next status in the sequence above, aside from the Waiting status' which relate to Client Task sections.

Do not remove or re-order the first and final sections. Other sections can be rearranged or removed as required (three dots > delete). There are also 2 'spare' In-Progress sections that can be moved and amended, or removed, as required.

Sections can be renamed as required (three dots > rename).

Tasks can be amended or added to each section as required. If you already have a documented process, try copying and pasting tasks from the document or spreadsheet into the relevant section in Karbon. Karbon will recognise each line separately and ask if you'd like to create each line as a different task. Each task should be assigned to a role (not to a person).

Automators have been added to each section. You only need to consider updating the last element of each automator, highlighted in bold brackets below.

First Section Automators

The automator in the first section does not require changing. The assignee is set already and the status of the work will automatically update to Ready to Start on the start date of the work assuming the fourth global automator is toggled on (When Planned work reaches its start date, update its status to Ready To Start).

Client Tasks

Client Task Emails

Customise the client task email and reminder email templates within your work template [referencing this guidance](#).

Client Task Section Automators

Where the following automators appear on client tasks they could be updated appropriately:

When: All tasks in the section above this section
Have the status: Completed
Change the: Status of: Work to: **[DEFINED STATUS]**

When: All tasks in the section above this section
Have the status: Completed
Change the: Due Date of: Tasks to: **[DEFINED DAYS]**

Internal Section Automators

For each internal section there are at least 4 automators:

The very first automator does not require amendment:
When: All tasks in the section above this section
Have the status: Completed
Change the: Status of: Tasks to: Ready to Start

The second automator has a set status, but can be changed if needed:
When: All tasks in the section above this section
Have the status: Completed
Change the: Status of: Work to: **[DEFINED STATUS]**

The third automator requires updating to the appropriate number of days:
When: All tasks in the section above this section
Have the status: Completed
Change the: Due Date of: Tasks to: **[DEFINED DAYS]**

The fourth automator has a set assignee of either Preparer or Reviewer. This can be updated if needed, but it should match the assignee of the task in the section.
When: All tasks in the section above this section
Have the status: Completed
Change the: Assignee of: Work to: **[DEFINED ROLE]**

Budget Tab

This template contains simple role-based time budgets.

If you are looking to track budgets in Karbon, read this guidance on how to [update your budget in the template](#).