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Templates download/Minutes customer projects

 Download

Organisation

| Type | Who | Task | Due date | Status |
|------|------|--------------------|----------|--------|
| ERM | all | Jour Fixe | Monday | |
| ERM | all | Check-in | Friday | |
| Info | alle | Check Support-Team | | |

Due tasks & dates (14-day overview)

| Project management | Customer | Due date | Task | Responsible |
|--------------------|----------|----------|------|-------------|
| | | | | |

Customers

Projects / Services

| Customer | Project Management | Task | Time estimate | Status |
|----------|--------------------|------|---------------|--------|
| | | | | |

Support

| Customer | Project Management | Task | Time estimate | Status |
|----------|--------------------|------|---------------|--------|
| | | | | |

Product

| Responsible | Task | Time Estimation | Status |
|-------------|------|-----------------|--------|
| | | | |

Infrastructure

| Verantwortlich | Task | Time estimate | Status |
|----------------|------|---------------|--------|
| | | | |

Other

Signatures

 Signatures

Page
template for customer project meeting meetings.

Importing the template

The import file is included in the archive file *HW-Minutes-customerprojects.zip*. Unpack the zip file first.

On the page *Special:Import* follow these steps:

1. **Select file** and choose *HW-Minutes-customerprojects.xml*.
2. **Enter** an Interwiki prefix. Since this field is required, simply add *hw* (for hallowelt).
3. **Keep** the selection *Import to default locations*.
4. **Click** *Upload file...*

The form-based template is now available in your wiki.

Pages included in the import<

- Template:Meeting minutes customer projects

Using the template

You can define this template as a [page template](#) in your wiki if you have administrator rights. If you have also downloaded the [general template for team meeting minutes](#), you can also define this template to be preloaded as such a team template.

Page templates

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Characteristics of a page template

A page template applies a predefined content structure and layout to new pages. Page templates are useful for frequently used content formats such as meeting minutes, reference pages or process descriptions, for example.

The following characteristics are typical for a page template:

- it can only be activated by administrators
- the underlying content itself can be created by any editor in the template namespace
- it can only be used for the initial creation of a page
- it can also contain (standard) templates
- it creates a prefilled page
- it can be restricted to certain namespaces
- it can be grouped ("tagged") with other templates
- it can contain categories
- it can be applied using different page creation mechanisms, such as the New-button, an [inputbox](#), or a [page form](#).

Standard page templates



is available from BlueSpice 4.2.

Page templates that are installed by default can be deleted (1) from the page [template manager](#).

Page templates administration

| <input type="checkbox"/> | Label | Description | Namespace | Template | Tags | Actions |
|--------------------------|----------------------|--------------------------------|-----------|-------------------------------|------|---------|
| <input type="checkbox"/> | Request for Comments | Ask for feedback about an i... | (all) | Template:PT Request for Co... | 2 | 1 |
| <input type="checkbox"/> | Decision Matrix | Make an informed decision b... | (all) | Template:PT Decision matrix | | |

Page template manager

Alternatively, the templates can be adapted directly in the template namespace. To do this, click on the template link in the column *Template* (2).

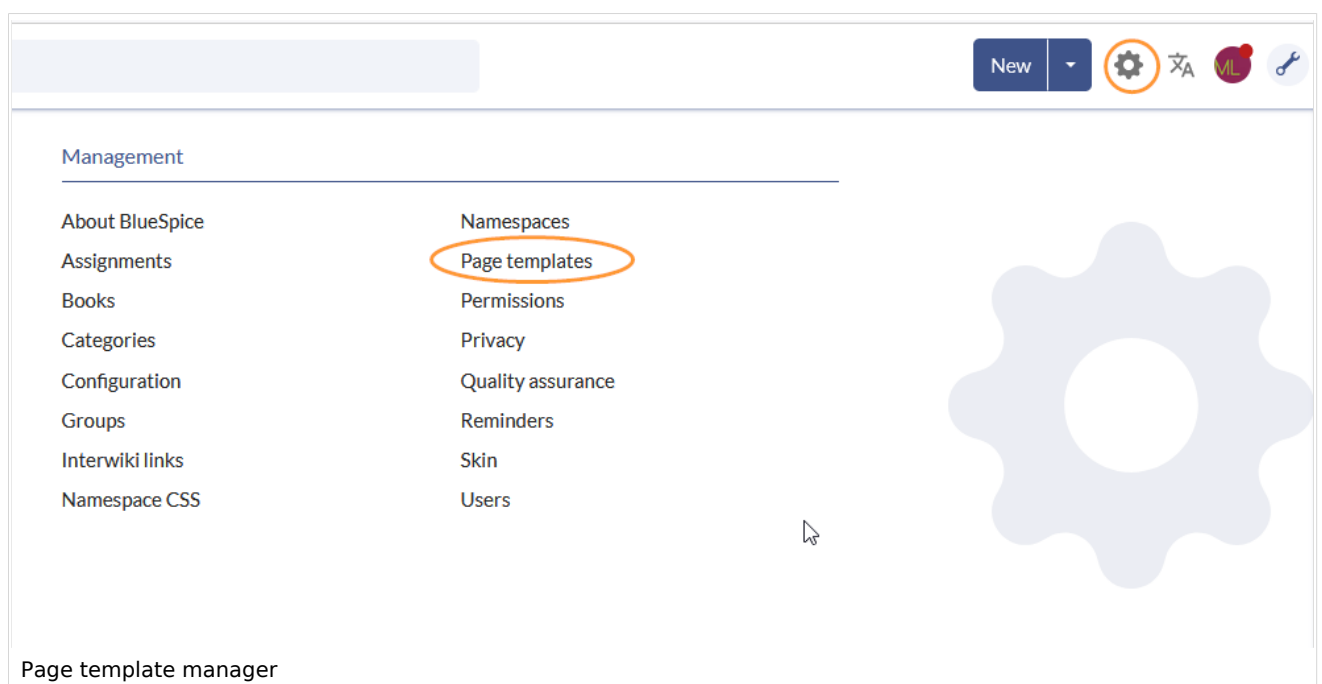
List of standard templates

| Page template | Edition | Description |
|-----------------|---------|---|
| Decision Matrix | pro | Make an informed decision by comparing your options |



| Page template | Edition | Description |
|----------------------------|--------------|--|
| Event | pro | Plan an event from beginning to end |
| Guideline | pro | Create a code of conduct or other guideline |
| How-to Article | free, pro | Step-by-step instructions for completing a task |
| Management Meeting Minutes | pro | Create minutes for a regular management meeting |
| Meeting Agenda | free | Create a generic meeting agenda with minutes |
| Request for Comments | pro | Ask for feedback about an important decision that needs to be made |
| Status Report | pro | Stakeholder über den derzeitigen Stand eines Projekts informieren |
| To-do List | free, pro | Track and update your to-dos |

Creating a page template

Administrators can create new page templates, as well as edit and remove existing ones in the *Page templates* manager, located under *Global actions*.



Page templates administration

| <input type="checkbox"/> | Label | Description | Namespace | Template | Tags | Actions |
|-------------------------------------|----------------------------|----------------------------------|-----------|-------------------------------|----------|---|
| <input type="checkbox"/> | Request for Comments | Ask for feedback about an i... | (all) | Template:PT Request for Co... | |   |
| <input type="checkbox"/> | Decision Matrix | Make an informed decision b... | (all) | Template:PT Decision matrix | | |
| <input checked="" type="checkbox"/> | Guideline | Create a code of conduct or ... | Training | Template:PT Guideline | training | |
| <input type="checkbox"/> | Management Meeting Minu... | Create minutes for a regular ... | (all) | Template:PT Meeting minut... | meetings | |
| <input type="checkbox"/> | How-to Article | Step-by-step instructions fo... | (all) | Template:PT How-to article | | |
| <input type="checkbox"/> | To-do List | Track and update your to-dos | Info | Template:PT To-do List | general | |
| <input type="checkbox"/> | Status Report | Inform stakeholders about t... | (all) | Template:PT Status report | | |
| <input type="checkbox"/> | Event | Plan an event from beginnin... | (all) | Template:PT Event planning | | |
| <input type="checkbox"/> | Meeting Agenda | Create a generic meeting ag... | Training | Template:PT Meeting minut... | meetings | |

<<

<

Page 1 of 1

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>>

↺

Displaying 1 - 9 of 9

Page templates administration

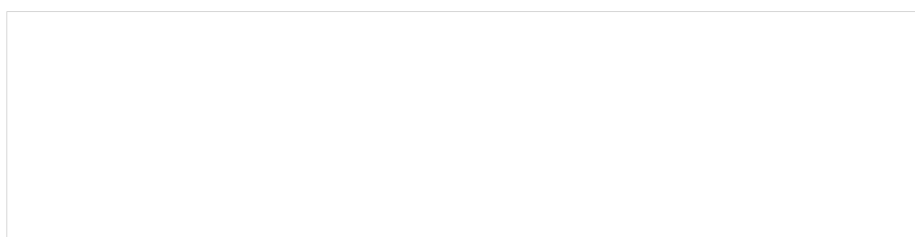
Note: Every page template depends on an actual page in the namespace Template. This template must exist before creating a page template.

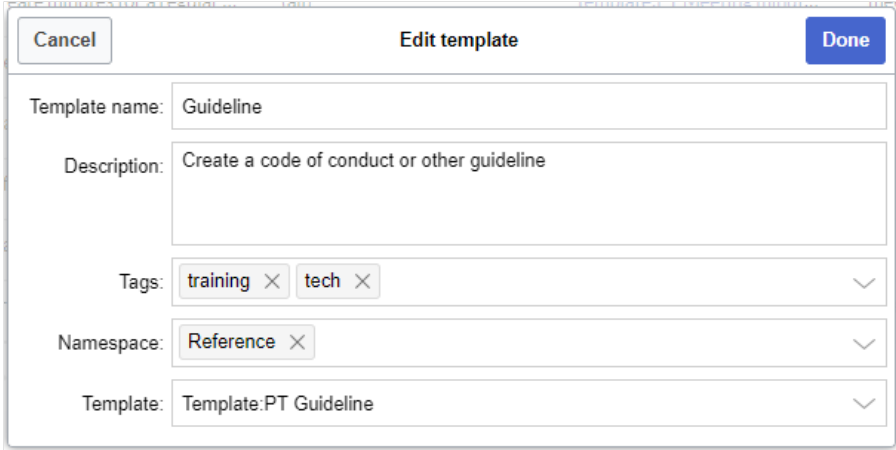
When a page template is selected, it can be edited by clicking the "wrench" icon or deleted by clicking the "X" icon.

New page templates can be added via the "Plus" button above the templates list.

When creating or editing a page template, **all fields are required**:

- **Name** - the name of the page template
- **Description** - a short description of the page template
- **Tags**- allows the grouping of similar templates. (If no classification is desired, you can enter *Untagged* as a value here, for example).
- **Namespace** - a list of the namespace where the template is active. If the template should be available on all pages, select *(all)* from the list.
- **Template** - page in the *Template* namespace from which to pull the content. **Important!** The namespace prefix `Template:` must be explicitly provided in the field.





Cancel Edit template Done

Template name: Guideline

Description: Create a code of conduct or other guideline

Tags: training × tech ×

Namespace: Reference ×

Template: Template:PT Guideline


Creating a page template

Applying a page template

- (1) Blank page:** When creating a new page, the page templates are displayed for selection. A blank page can be created by default. This option can be deactivated in the [configuration manager](#).
- (2) Filter field:** The templates can be filtered here. This field is independent of the *Tags* /*Namespaces* toggles.
- (3) Tags/namespaces toggle:** Here you can switch between tag-based and namespace-based sorting.
- (4) Sort title:** The sort titles show the grouping by tags or by namespaces, depending on the toggle setting.
- (5) Assignment to tag/namespace:** Depending on the setting of the toggle, the tags (when sorted by namespaces) or namespaces (when sorted by tags) are displayed here as additional possible filter criteria.

This page doesn't exist yet. You can create a new page. If you don't want to do that, click the back button of your browser to return to the last page visited.

1

 **Empty page**
Start with an empty page.

2


3


Tags Namespaces

4


management

5

 **Decision Matrix**
Make an informed decision by comparing your options
Info

 **Guideline**
Create a code of conduct or other guideline
Info

meetings

 **Meeting Agenda**
Create a generic meeting agenda with minutes
Training

Applying a page template

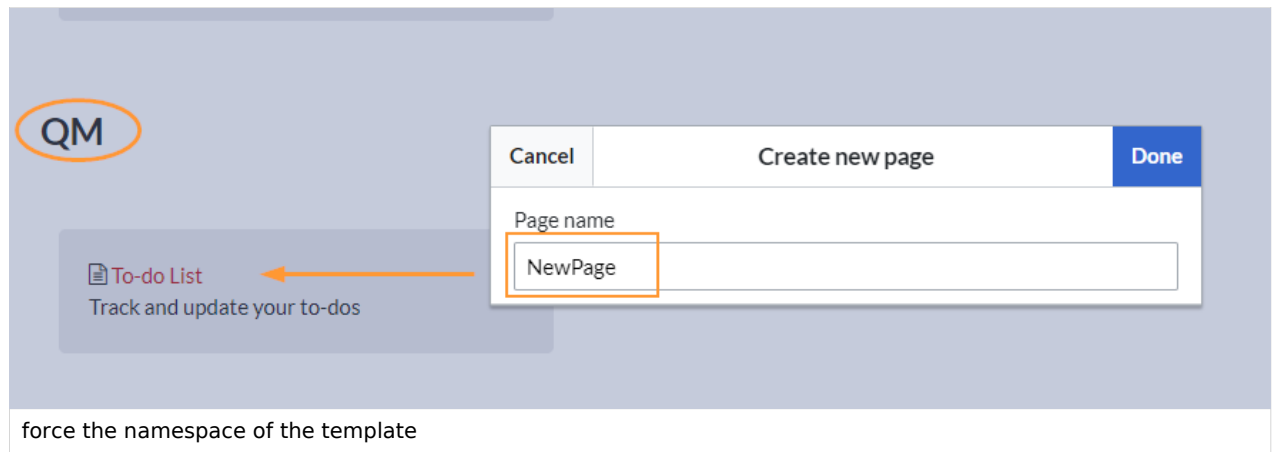
Namespace manager

The PageTemplates option for a namespace must be activated in the [Namespace manager](#) so that the associated templates are automatically displayed when a new page is created in that namespace (e.g., if the "+" button is used to create the page).

Configuration

In the [Config manager](#), you can change the following settings:

- **Force target namespace:** The page is always created in the target namespace that is associated with the template, even if the user provided a different namespace prefix. In the screenshot below, the user wants to create the page "NewPage" and then selects a template for the QM namespace. The page is, therefore, created as "QM:NewPage" if this setting is activated.



- **Hide default templates:** Hides the default *Empty page* template.
- **Hide template if the page is not to be created in the target namespace:** Depending on the namespace prefix of the page to be created, templates that are associated with other namespaces will not be shown to the user for selection.

➔ [Technical Reference: BlueSpicePageTemplates](#)

Templates download/Minutes for teams

This template contains a combined roll-up page for creating meeting minutes of different teams. A standard protocol page template is also included.

The template can be expanded with additional page templates for different types of meeting minutes.

 [Download](#)

Attendees

Antje Kramer (secretary), Mark Pichler, Ursula Gerstmair, Hu Cheng

Agenda

| Time | Duration | Topic | Responsible |
|----------|----------|------------------------------|-------------|
| 10:00 AM | 30 min | Review of open leads | |
| 10:30 AM | 15 min | Strategy: customer relations | |
| 10:45 AM | 15 min | New pricing concept | |
| | | | |
| 11:00 AM | 60 min | End of meeting | |

Results

- 6 of 9 leads are promising, follow-ups to be scheduled
- Pricing structure too difficult for customers to understand
- Missing documentation for customer relations processes

Action items

| Description | Responsible | Due date |
|---|-------------|----------|
| Follow-ups | | |
| Meeting with management regarding new prices | Hu | week 35 |
| Documentation for customer relations strategy in wiki | Antje | week 36 |

Signatures

--MLR (talk) 15:21, 25 May 2021 (CEST)

--MLR (talk) 15:21, 25 May 2021 (CEST)

✍ Signatures

IT

2021-07-02 [New page](#)

- IT/2021-05-30
- IT/2021-05-29
- IT/2021-05-28
- IT/2021-05-27
- IT/2021-05-26
- ... further results

Sales

2021-07-02 [New page](#)

- Sales/2021-05-25

Importing the template

The import file is included in the archive file *HW-Minutes.zip*. Unpack the zip file first.

On the page *Special:Import* follow these steps:

1. **Select file** and choose *HW-Minutes.xml*.
2. **Enter** an Interwiki prefix. Since this field is required, simply add *hw* (for hallowelt).
3. **Keep** the selection *Import to default locations*.
4. **Click** Sie *Upload file...* .

The template is now available in your wiki.

Pages included in the import

The xml import creates the following files in your wiki:

- Meeting minutes (in the *Main* namespace)
- Template:Meeting minutes
- Template:Meeting minutes/styles.css
- Template:Meeting minutes standard

Using the template

Create a namespace

Over time, you will create many pages for meeting minutes. It therefore makes sense to store them in their own namespace. We suggest that you create the "Minutes" namespace for this purpose. The template for minutes requires that this namespace is available.

If you do not want to use the "Minutes" namespace in your wiki, you can adjust the expected namespace in the file *Template:Meeting minutes*. To do this, change the prefix *Minutes* in the *inputbox* tag:

```
{{#tag:inputbox|
...
prefix=Minutes:{{{1|{{PAGENAME}}}}}/
```

to your own namespace, here exemplified as *Your_namespace*:

```
{{#tag:inputbox|
...
prefix=Your_namespace:{{{1|{{PAGENAME}}}}}/
```

Add a navigation link

To easily find and create meeting minutes, you should provide a direct link to the Minutes roll-up page in the [main navigation](#). By default, the page *Meeting minutes* is located in the main namespace. You can move it to any namespace you want.

Customizing the template

Creating individual teams

Three adjustments need to be made for each team section on the main *Meeting minutes* page:

1. The **box heading** with the team name.
2. The **team name** used to create the file path for this team's minutes. This generates the main page prefix used for any meeting time for this team before the date. For example *Marketing/2021-07-01*.
3. The **page template** you want to use for the team's meeting minutes. By default, there is only one template (Meeting minutes standard) for all meeting minutes. Simply create a new page in the template namespace and assign it here as a preload template for a team.

Example of a team:

```
<div class="block">
== My team==
{{Meeting minutes|My team|preload=Template:Meeting minutes my team}}
</div>
```

Result:

My team

2021-07-02

New page

- My team/2021-05-25

Inputbox for creating meeting minutes