quint-essenz
Quality development in health promotion and prevention

Instruction

Creating a customized template

Version 3.1 (21-06-2011)

Hubert Studer & Günter Ackermann

iterum
qualitätsentwicklung

Gesundheitsförderung Schweiz
Promotion Santé Suisse
Promozione Salute Svizzera
Health Promotion Switzerland

Entry page   My domain   Quality system   Projects   Community   Products/Services   Help   Search

My domain
My templates

+ −

Manage selection
Cancel filter
Tags
Categories
All | No filtering
● Standard templates   16
● Institutional templates   8
● Customized templates   40
Languages
All | No filtering
● German   31
● English   4
● French   16
● Italian   7
● Spanish   0
● Other   0

List

Name / Owner
Final report (evaluation)
Hubert Studer – Profile
Milestone report (evaluation)
Hubert Studer – Profile
Project design (planning)
Hubert Studer – Profile
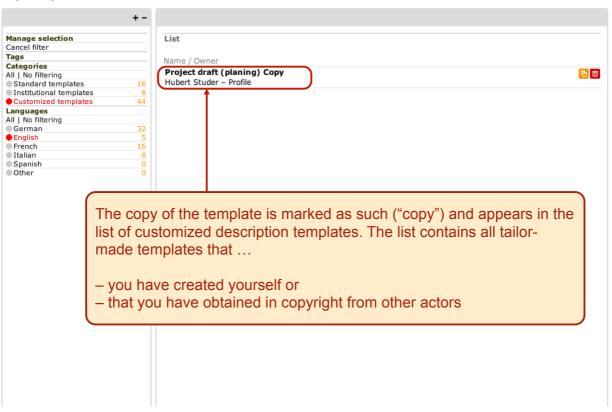**Project draft (planing)**
Hubert Studer – Profile

Customized templates are always based on an existing pre-defined template. In order to create your own template you must first copy an existing one. You will normally find it useful to base your own template on a standard one.

My domain
My templates

+ −

Manage selection
Cancel filter
Tags
Categories
All | No filtering
○ Standard templates   16
○ Institutional templates   8
● Customized templates   44
Languages
All | No filtering
○ German   32
● English   5
○ French   16
○ Italian   8
○ Spanish   0
○ Other   0

List

Name / Owner

Project draft (planing) Copy
Hubert Studer – Profile

The copy of the template is marked as such ("copy") and appears in the list of customized description templates. The list contains all tailor-made templates that …

– you have created yourself or
– that you have obtained in copyright from other actors

My domain
My templates

+ −

Manage selection
Cancel filter
Tags
Categories
All | No filtering
○ Standard templates   16
○ Institutional templates   8
● Customized templates   44
Languages
All | No filtering
○ German   32
● English   5
○ French   16
○ Italian   8
○ Spanish   0
○ Other   0

List

Name / Owner

Project draft (planing) Copy
Hubert Studer – Profile

Choose the copied template so that you can adapt it.

My templates
Project draf   gs: [None]

Here, you may adapt and complete the **basic information** of your copy (e.g. change the name, the version) according to your own requirements.

1 Assessment
  1 Initial situation
  2 Need (normative)
  3 Needs (felt/expressed)
  4 Integration
  5 Similar projects
  6 Customized
2 Health promotion
  1 Health equity
  2 Empowerment
  3 Setting
  4 Participation
  5 Customized
3 Project planning
  1 Vision
  2 Procedure
  3 Settings
  4 Target groups
  5 Definition of objectives
  6 Milestones
  7 Measures
  8 Budget
  9 Customized
4 Project organization
5 Project management
6 Results and outcome
7 Customized
  1 Customized 1
  2 Customized 2
  3 Customized 3
  4 Customized 4

Basic information

Fields marked with an '*' must be completed

Basic information

Category	Customized templates
Profile name*	Project draft (planning) Kopie
Profile name*	
Date	12/26/2007
Version	
Authors	quint-essenz team
Organization	
Internet address	www.quint-essenz.ch/en/
Description	

Language
  ○ German
  ● English
  ○ French
  ○ Italian
  ○ Spanish

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  1 Health equity
  2 Empowerment
  3 Setting
  4 Participation
  5 Customized
3 Project planning
  1 Vision
  2 Procedure
  3 Settings
  4 Target groups
  5 Definition of objectives
  6 Milestones
  7 Measures
  8 Budget
  9 Customized
4 Project organization
5 Project management
6 Results and outcome
7 Customized
  1 Customized 1
  2 Customized 2
  3 Customized 3
  4 Customized 4

Profile name*	
Date	12/26/2007
Version	
Authors	quint-essenz team
Organization	

Here, you can define if your template will be used for …

– **Planning** (e.g. project draft, project design)
– **Evaluation** (z.B. final report)
– **Management** (e.g. milestone report)

Different fields, key questions and modules are proposed, depending on the purpose.

Language
  ○ German
  ● English
  ○ French
  ○ Italian
  ○ Spanish
  ○ Other

Intended purpose

Intended purpose	Planning ⇅

Privileges of members (online)

Name	Use ?	Edit?	Delete?	
Hubert Studer – Profile	☑	☑	☑	✎ 🗑
Add a member				➕ 🗑

My templates
Project draft (planning) Kopie
Tags: [None]

+ –

- **1 Assessment**
  - 1 Initial situation
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- **3 Project planning**
  - 1 Vision
  - 2 Procedure
  - 3 Settings
  - 4 Target groups
  - 5 Definition of objectives
  - 6 Milestones
  - 7 Measures
  - 8 Budget
  - 9 Customized
- **4 Project organization**
  - 1 Project structure
  - 2 Qualifications
  - 3 Networking
  - 4 Customized
- **5 Project management**
  - 1 Evaluation
  - 2 Controlling
  - 3 Communication
  - 4 Documentation
  - 5 Motivation
  - 6 Customized
- **6 Results and outcome**
  - 1 Goal attainment
  - 2 Other results
  - 3 Diffusion of results

Basic information

Category	Customized templates
Profile name	Project draft (planning) Kopie
Date	2007-12-26
Version	
Authors	quint-essenz team
Organization	
Internet address	http://www.quint-essenz.ch/en/
Description	
Language	
Intended purpose	Planning

Privileges of members (online)

Name	Use ?	Edit?	Delete?
Hubert Studer – Profile	☑	☑	☑
Add a member			

Here, you can allow other registered quint-essenz users to copy and use your template.

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+ –

- **1 Assessment**
  - 1 Initial situation
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  - 3 Networking
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  - 2 Controlling
  - 3 Communication
  - 4 Documentation
  - 5 Motivation
  - 6 Customized
- **6 Results and outcome**
  - 1 Goal attainment
  - 2 Other results
  - 3 Diffusion of results

Basic information

Category	Customized templates
Profile name	Project draft (planning) Kopie
Date	2007-12-26
Version	
Authors	quint-essenz team

The menu on the left shows all the elements that are available for creating your own template:

– **Light blue**: this element will appear in your description
– **Grey**: this element will *not* appear in your description

You can expand and collapse a domain by clicking on the title.

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My templates
Project draft (planning) Kopie – Project organization

+ –

1 Assessment
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- 2 Need (normative)
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- 1 Vision
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- 5 Definition of objectives
- 6 Milestones
- 7 Measures
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4 Project organization
5 Project management
6 Results and outcome

7 Customized
- 1 Customized 1
- 2 Customized 2
- 3 Customized 3
- 4 Customized 4

Navigation

Menu item shortcut

Default value Project organization
Profile

Reports

Subtitle in reports

Default value Project organization
Profile

> Customized templates allow you to go beyond standard templates and to add aspects that are particularly relevant for your own institution or for your specific topic.

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My templates
Project draft (planning) Kopie – Project organization

+ –

1 Assessment
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Navigation

Menu item shortcut

Default value Project organization
Profile

Reports

Subtitle in reports

Default value Project organization
Profile

> Drop and drag (with your mouse) if you want to change the order of the elements within each section or even the order of the sections.

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You define for each element (here: health equity) if and how you want it to appear in your own template …

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  - 1 Customized 1
  - 2 Customized 2
  - 3 Customized 3
  - 4 Customized 4

Template element

Menu item shortcut
Default value   Health equity
Template   [   ]   < 26 Characters

Subtitle in reports
Default value   Health equity
Template   [   ]

Key question planning
Default value   To what extent does the project contribute to health equity?
Template   [   ]

More information on planning (internet address)
Default value   www.quint-essenz.ch/en/topics/1270
Template   [   ]

Modules

Name
[No modules]

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Set state to not relevant

Visible in the description yes/no?

My domain :: My templates
Project draft (planning) Kopie

State: relevant

+ −

- 1 Assessment
  - 1 Initial situation
  - 2 Need (normative)
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  - 1 Customized 1
  - 2 Customized 2
  - 3 Customized 3
  - 4 Customized 4

Template element

Menu item shortcut   Health equity
Subtitle in reports   Health equity

Key question planning   To what extent does the project contribute to health equity?

More information (internet address)   www.quint-essenz.ch/en/topics/1270

Modules

Name
[No modules]

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Set state to not relevant

My domain :: My templates
Project draft (planning) Kopie
State: relevant

+ −

- 1 Assessment
  - 1 Initial situation
  - 2 Need (normative)
  - 3 Needs (felt/expressed)
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Template element

Menu item shortcut
Subtitle in reports

Key question planning

More information (internet address)

Attention: Only use one entry mode (list or table) in any one element; if not, some entries (here: objectives) may later appear twice!

Modules

Name

Objectives (list)   yes | no

Categories of objectives, objectives and indicators (table)   yes | no

Some elements (e.g. settings, target groups, definition of objectives, budget) give you the possibility to enter data in list or table form (modules), in addition to the standard text field. You may add them to your customized template.

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My domain :: My projects
GF Schule

+ −

Project   Members   Organizations   Descriptions   Assessments   Project diary   Tasks   Documents   Links

Basic information

Fields marked with an '*' must be completed

Template

Category*   Customized templates
Template*   Project draft (planning) Kopie

Meta data

Description name*   Draft
Abbreviation of description *   Draft
Date   06/22/2011
Version
Authors

Account periods

Account period 1
Account period 2
Account period 3
Account period 4

Your new customized template is now ready for use. Use it for any new project description or apply it to existing descriptions, if you want. Your new template is listed in the category "Customized templates".

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Report

My domain :: My projects :: GF Schule
Draft

Tags: [None]

+ −

| Project | Members | Organizations | **Descriptions** | Assessments | Project diary | Tasks | Documents | Links |

Assessment
- Initial situation
- Need (normative)
- Similar projects

Health promotion
- Health equity
- Empowerment
- Participation

Project planning
- Vision
- Procedure
- Settings
- Target groups
- Definition of objectives
- Milestones
- Measures
- Budget

Project organization
- Project structure
- Networking

Project management
- Evaluation

Results and outcome
- Goal attainment
- Diffusion of results
- Sustainability

Basic information

Category	Customized templates
Template	Project draft (planning) Kopie
Intended purpose	Planning
Description name	Draft
Abbreviation of description	Draft
Authors	

Delete?

☐
☐
☑

On the left appear the elements that you have chosen for your own customized template and that are relevant to your project or context. Tags, key questions, modules, etc. now appear in exactly the way and order that you have defined for yourself.

Any later change to your template will be integrated automatically .

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