Checklist Templates

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The Checklists feature lets you keep track of tasks and assign them to particular users. For information about creating and using checklists, please see Checklists .

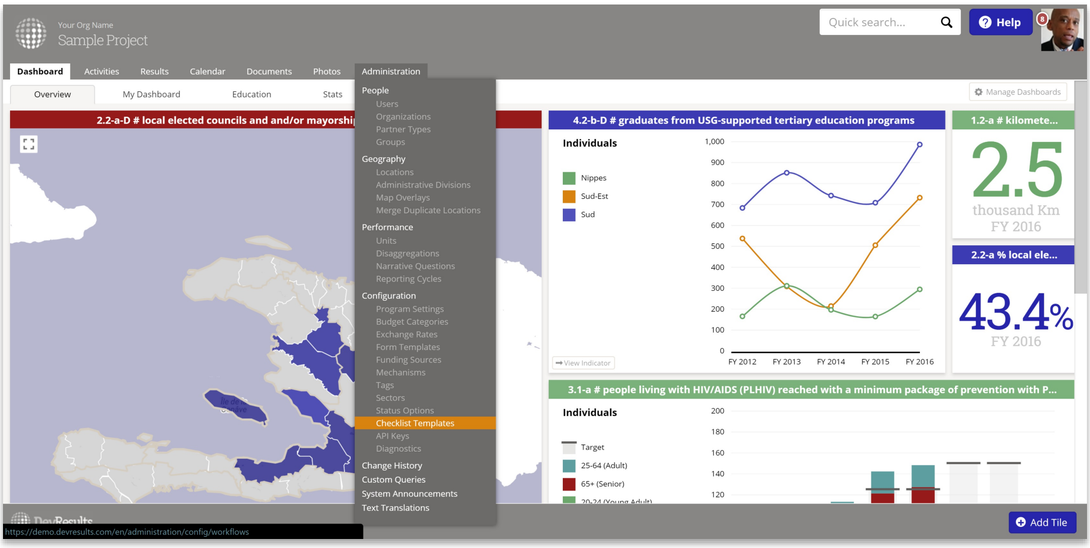
You might have a checklist that you'd like to use multiple times, for multiple activities, or for any sequence of tasks that need to be done frequently or regularly. For this, you can create a checklist template. A checklist template lets you save a single list of tasks, then to add that checklist to any activity from a dropdown menu. Then, you can assign due dates for the tasks in the list and assign them to the appropriate users.

There are two ways to create a checklist template:

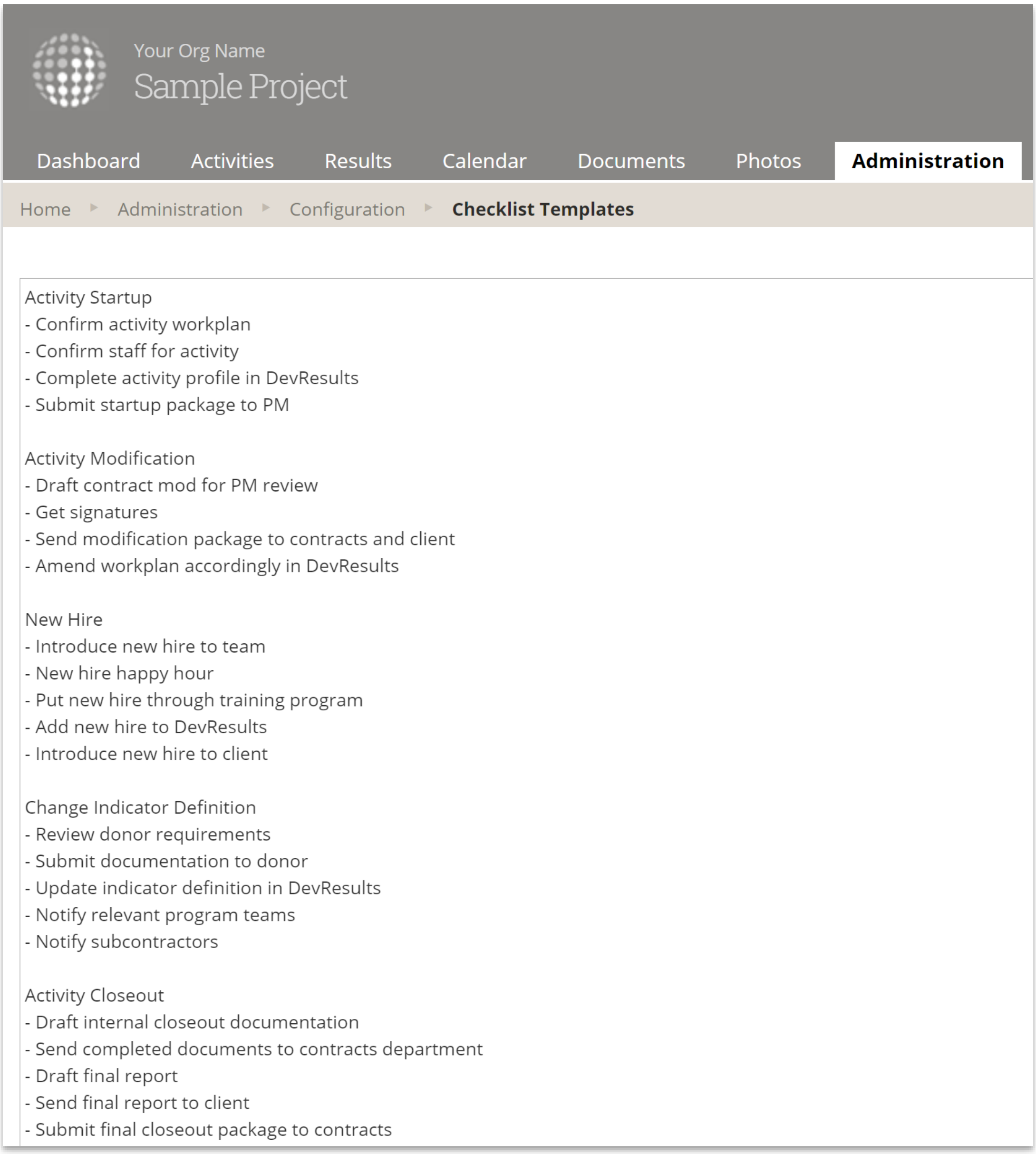
- Create a template from scratch
- Create a template from an existing checklist

Creating a checklist template from scratch

To create a checklist template, go to **Administration > Checklist Templates**.

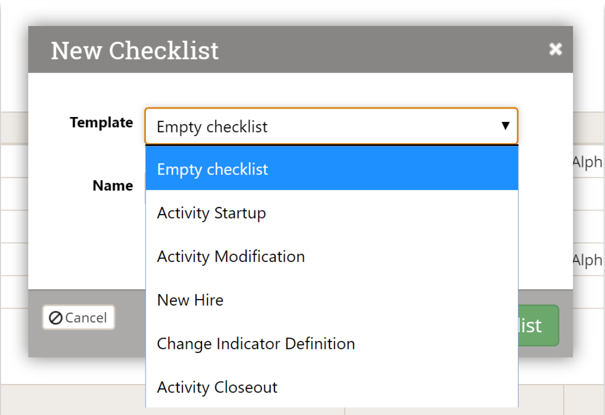


The Checklist Templates page has a text window. To create a template, write the title of the template with each task on a separate line below the title. Place a dash and a space in front of each task. Leave a blank line between separate templates.

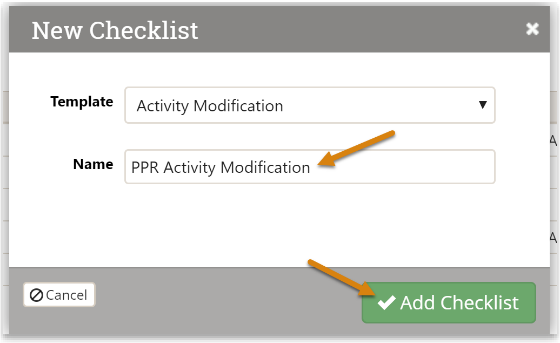


When you've created your template, click **Done** or click outside the text window.

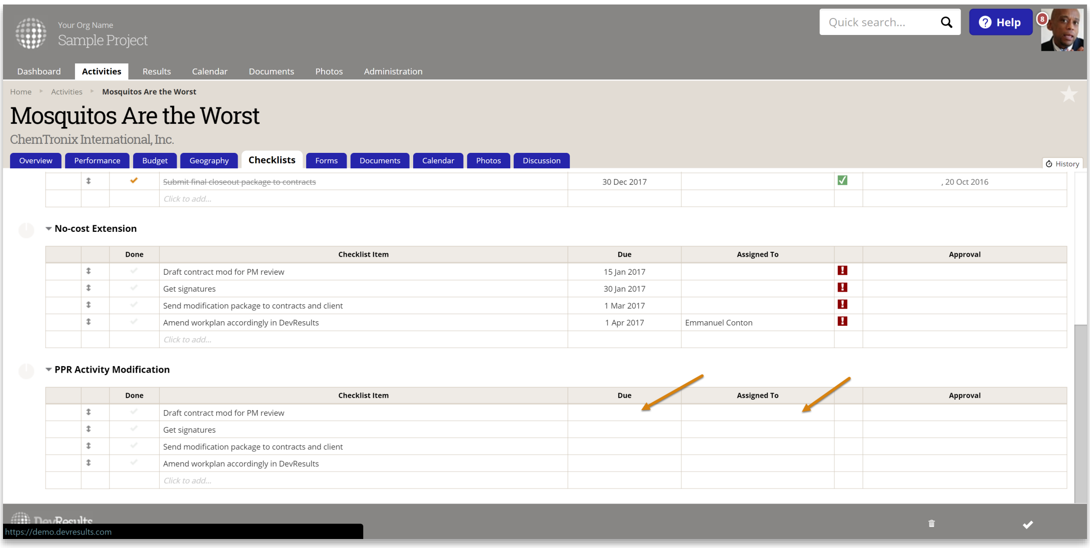
Now, when you go to an activity checklist tab and create a checklist, you can select your new checklist template from the dropdown menu.



Assign it a relevant name and click the **Add Checklist** button.



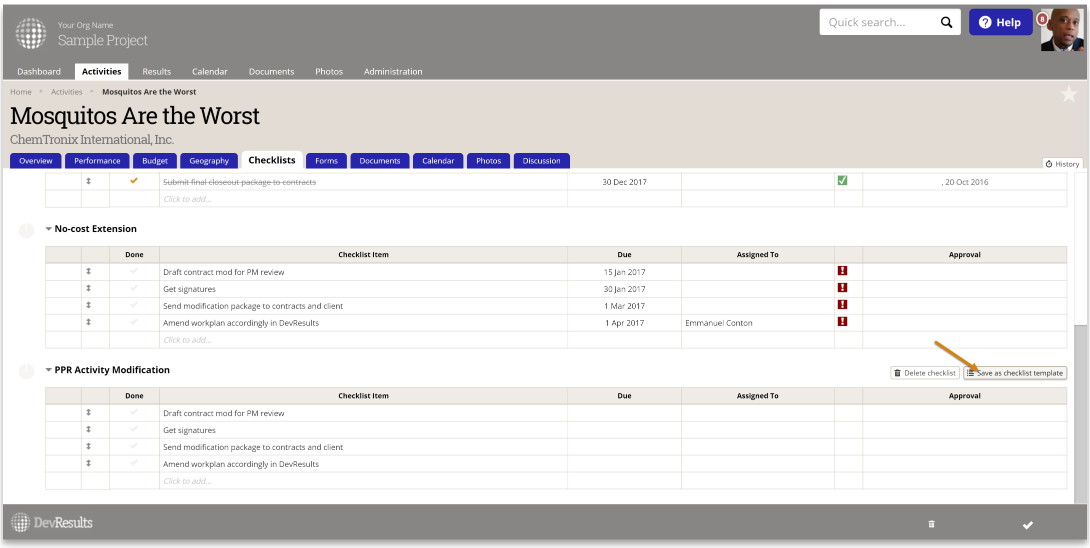
The checklist and tasks will appear at the bottom of the page. You can then assign users and due dates to each task.



Creating a checklist template from an existing checklist

Alternatively, you can convert an existing checklist into a checklist template. Once you've found the activity checklist you'd like to use as a template, hover over the checklist.

Click the **Save as checklist template** button that appears in the upper right. This will copy the checklist Title and Task List to the Checklist Templates file. You can then go to **Administration > Checklist Templates** to make any further refinements.



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