

Checklist Templates

Last Modified on 02/09/2018 11:42 am EST

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](#) .

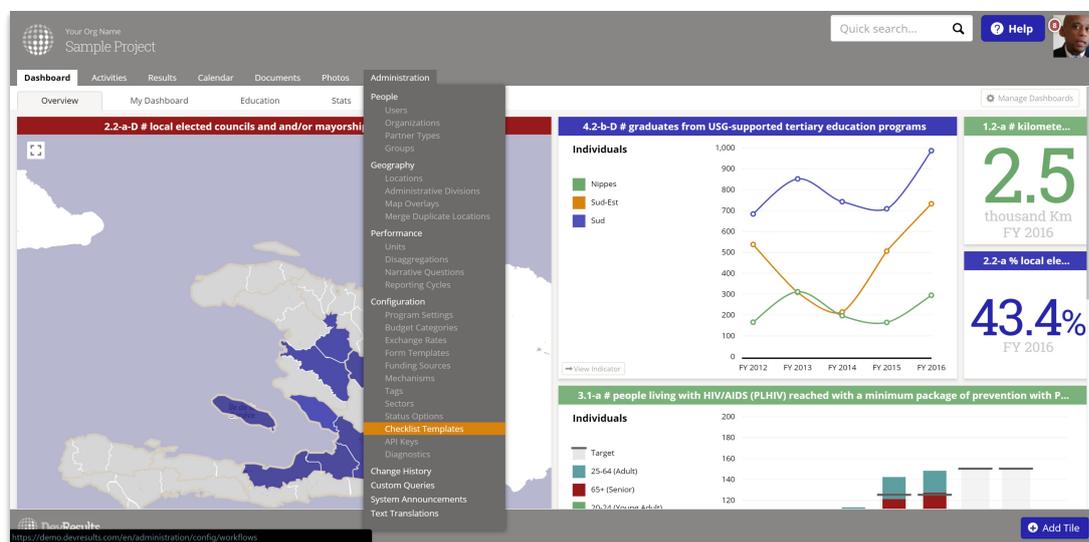
You might have a checklist that you'd like to use multiple times, for multiple activities, or for any sequence of tasks that need to be done frequently or regularly. For this, you can create a checklist template. A checklist template lets you save a single list of tasks, then to add that checklist to 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.

Your Org Name
Sample Project

Dashboard Activities Results Calendar Documents Photos Administration

Home Administration Configuration Checklist Templates

Activity Startup

- Confirm activity workplan
- Confirm staff for activity
- Complete activity profile in DevResults
- Submit startup package to PM

Activity Modification

- Draft contract mod for PM review
- Get signatures
- Send modification package to contracts and client
- Amend workplan accordingly in DevResults

New Hire

- Introduce new hire to team
- New hire happy hour
- Put new hire through training program
- Add new hire to DevResults
- Introduce new hire to client

Change Indicator Definition

- Review donor requirements
- Submit documentation to donor
- Update indicator definition in DevResults
- Notify relevant program teams
- Notify subcontractors

Activity Closeout

- Draft internal closeout documentation
- Send completed documents to contracts department
- Draft final report
- Send final report to client
- Submit final closeout package to contracts

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.

New Checklist

Template Empty checklist

Name Empty checklist

- Activity Startup
- Activity Modification
- New Hire
- Change Indicator Definition
- Activity Closeout

Cancel

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

New Checklist

Template: Activity Modification

Name: PPR Activity Modification

Cancel Add Checklist

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

Dashboard: Activities Results Calendar Documents Photos Administration

Home > Activities > Mosquitos Are the Worst

Mosquitos Are the Worst

ChemTronix International, Inc.

Overview Performance Budget Geography Checklists Forms Documents Calendar Photos Discussion

Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Draft contract mod for PM review	15 Jan 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Get signatures	30 Jan 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Send modification package to contracts and client	1 Mar 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Amend workplan accordingly in DevResults	1 Apr 2017	Emmanuel Conton	<input type="checkbox"/>

PPR Activity Modification

Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Draft contract mod for PM review			
<input checked="" type="checkbox"/>	Get signatures			
<input checked="" type="checkbox"/>	Send modification package to contracts and client			
<input checked="" type="checkbox"/>	Amend workplan accordingly in DevResults			

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.

Your Org Name
Sample Project

Quick search...

Dashboard **Activities** Results Calendar Documents Photos Administration

Home > Activities > Mosquitoes Are the Worst

Mosquitoes Are the Worst

ChemTronix International, Inc.

Overview Performance Budget Geography **Checklists** Forms Documents Calendar Photos Discussion

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Submit final closeout package to contracts	30 Dec 2017		<input checked="" type="checkbox"/>	,20 Oct 2016
Click to add...						

No-cost Extension

Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Draft contract mod for PM review	15 Jan 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Get signatures	30 Jan 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Send modification package to contracts and client	1 Mar 2017		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Amend workplan accordingly in DevResults	1 Apr 2017	Emmanuel Conton	<input type="checkbox"/>
Click to add...				

PPR Activity Modification

Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Draft contract mod for PM review			
<input checked="" type="checkbox"/>	Get signatures			
<input checked="" type="checkbox"/>	Send modification package to contracts and client			
<input checked="" type="checkbox"/>	Amend workplan accordingly in DevResults			
Click to add...				

Delete checklist Save as checklist template

DevResults

Didn't answer your question? Please email us at help@devresults.com.

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