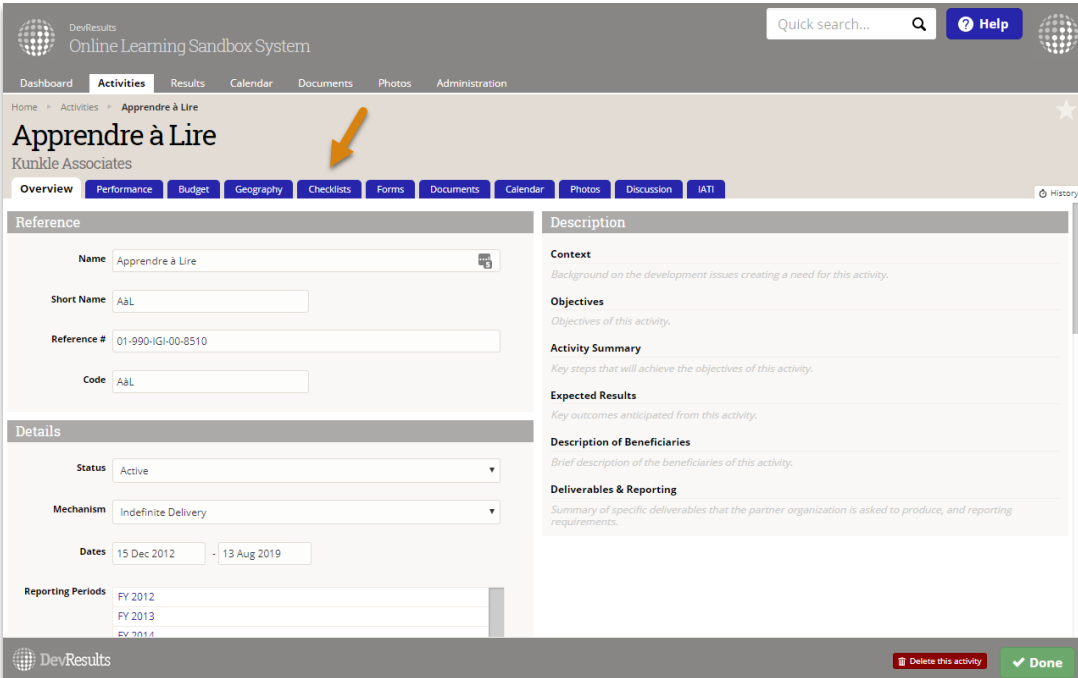


# Checklists

Last Modified on 08/14/2018 1:19 pm EDT

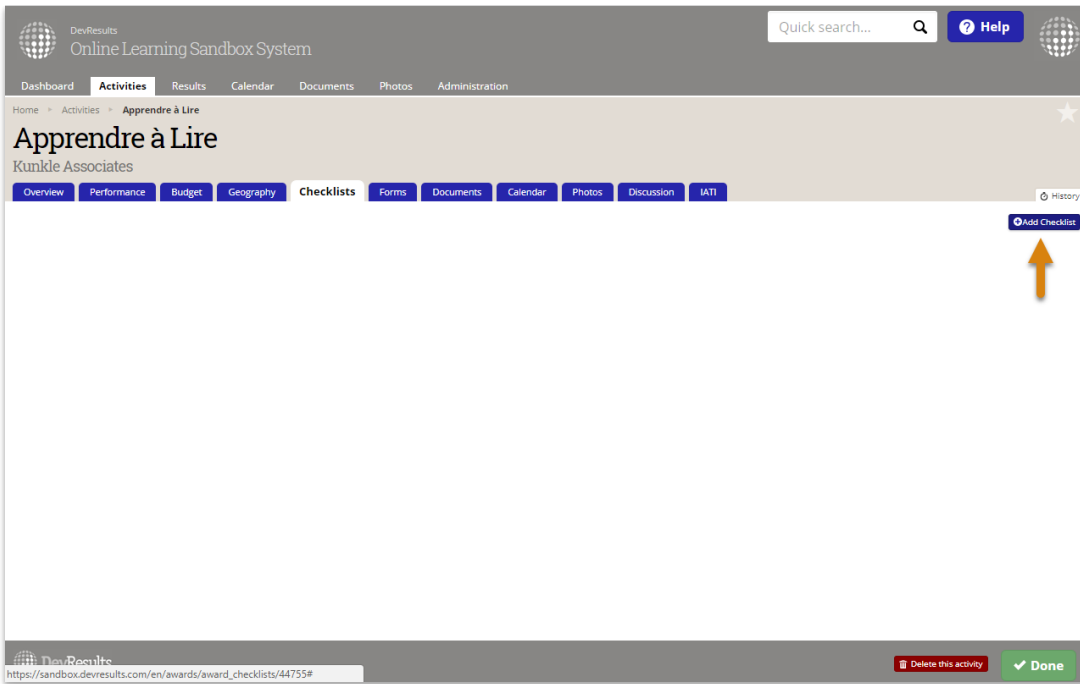
Checklists are a great tool for tracking and managing milestones and tasks. Checklists are associated with specific activities. One activity can have an unlimited number of checklists, and a single checklist can have an unlimited number of tasks in it. Each task can be assigned to a DevResults user and given a due date.

To create a checklist, navigate to the activity for the checklist and click on the " **Checklist**" tab.

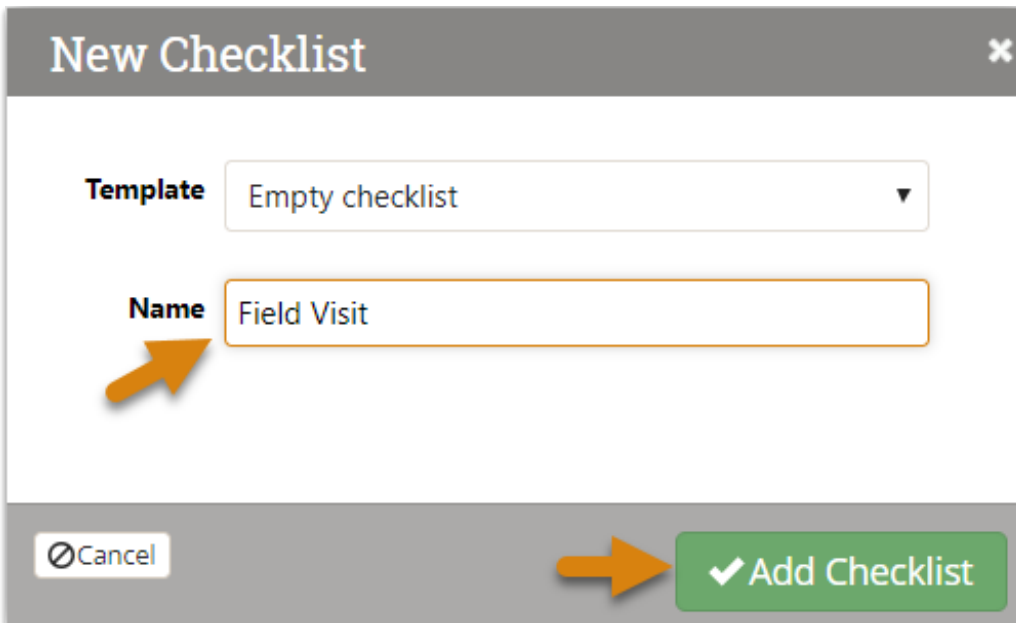


The screenshot displays the DevResults Online Learning Sandbox System interface. At the top, there is a navigation bar with 'Dashboard', 'Activities', 'Results', 'Calendar', 'Documents', 'Photos', and 'Administration'. A search bar and a 'Help' button are also present. The main content area shows the activity 'Apprendre à Lire' by 'Kunkle Associates'. A sub-navigation bar includes 'Overview', 'Performance', 'Budget', 'Geography', 'Checklists', 'Forms', 'Documents', 'Calendar', 'Photos', 'Discussion', and 'IATI'. The 'Checklists' tab is highlighted with an orange arrow. Below the navigation, there are sections for 'Reference' (Name, Short Name, Reference #, Code) and 'Details' (Status, Mechanism, Dates, Reporting Periods). A 'Description' section on the right contains fields for Context, Objectives, Activity Summary, Expected Results, Description of Beneficiaries, and Deliverables & Reporting. At the bottom right, there are buttons for 'Delete this activity' and 'Done'.

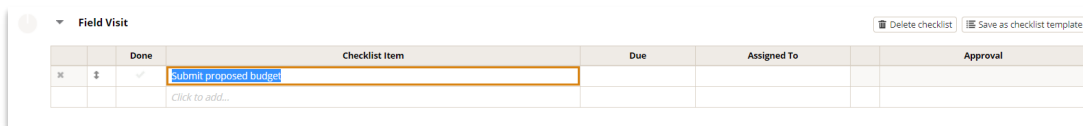
Click on "**+ Add Checklist**".



You can choose to add a new checklist by giving it a name and clicking the " **Add Checklist**" button.



In the *Title* column, add the name of the first task or milestone.



Assign the task to someone by selecting a DevResults user from the dropdown menu. Each task can only be assigned to one person. When you assign a task to someone, they **receive a notification** in their DevResults inbox and via their external email address.

The screenshot shows the DevResults interface for 'Apprendre à Lire' under 'Checklists'. A table lists checklist items. The first item is 'Submit proposed budget'. The 'Assigned To' dropdown menu is open, showing a list of names including 'Abdoulaye Agbo', 'Alexis Wright', 'Alphonse Bientot', 'Alphonse Blyden', 'Amadou Konte', 'Amadou Oury Forna', 'André Dieudonné', and 'Ritika Bhasker'. An orange arrow points to the dropdown menu.

Done	Checklist Item	Due	Assigned To	Approval
<input type="checkbox"/>	Submit proposed budget		No one	
	<i>Click to add...</i>			

Enter the due date for the task or milestone.

The screenshot shows the same checklist item 'Submit proposed budget'. The 'Due' field now contains the date '9/30/2018'. The 'Assigned To' field is now populated with 'Abdoulaye Agbo'. An orange arrow points to the 'Due' field.

Done	Checklist Item	Due	Assigned To	Approval
<input type="checkbox"/>	Submit proposed budget	9/30/2018	Abdoulaye Agbo	
	<i>Click to add...</i>			

When the user completes the task, they should click the checkmark next the task. A completed task has an orange checkmark.

The screenshot shows the task 'Submit proposed budget' is now completed. The 'Done' column has an orange checkmark. A tooltip 'Click to check' is visible over the checkmark. An orange arrow points to the checkmark.

Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Submit proposed budget	30 Sep 2018	Abdoulaye Agbo	
	<i>Click to add...</i>			

A manager or owner in DevResults can approve the completion of the task.

The screenshot shows the task 'Submit proposed budget' is now approved. The 'Approval' column contains a checkmark and the name 'Abdoulaye Agbo'. An orange arrow points to the approval checkmark.

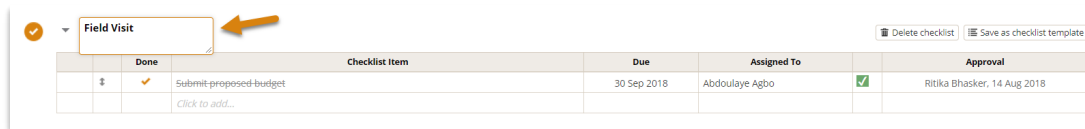
Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Submit proposed budget	30 Sep 2018	Abdoulaye Agbo	<input checked="" type="checkbox"/> Approve
	<i>Click to add...</i>			

When a manager or owner approves the completion of a task, their name and a timestamp appear for who approved the task and when. Next to the name of the checklist, the pie chart shows the portion of the checklist that's complete.

The screenshot shows the task 'Submit proposed budget' with a pie chart next to the 'Done' column. The pie chart is partially filled with orange, indicating the completion status. The 'Approval' column shows 'Ritika Bhasker, 14 Aug 2018'. A second checklist item 'Create contract for services' is also visible.

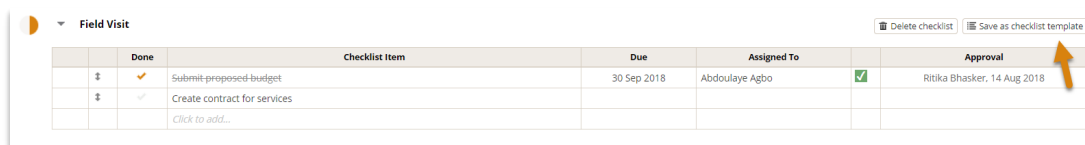
Done	Checklist Item	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	Submit proposed budget	30 Sep 2018	Abdoulaye Agbo	<input checked="" type="checkbox"/> Ritika Bhasker, 14 Aug 2018
<input type="checkbox"/>	Create contract for services			
	<i>Click to add...</i>			

If you need to edit the name of a checklist, click on the checklist name. This will give you an editable grid you can use to change the name of the checklist.

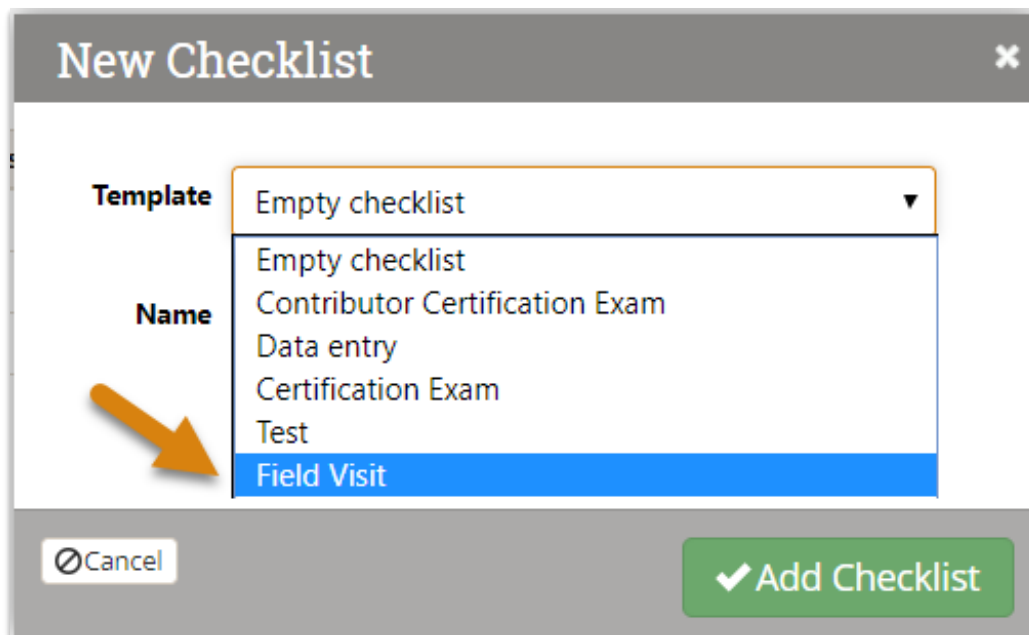


If you need to use the same checklist repeatedly, you can save it as a template and reuse it as needed.

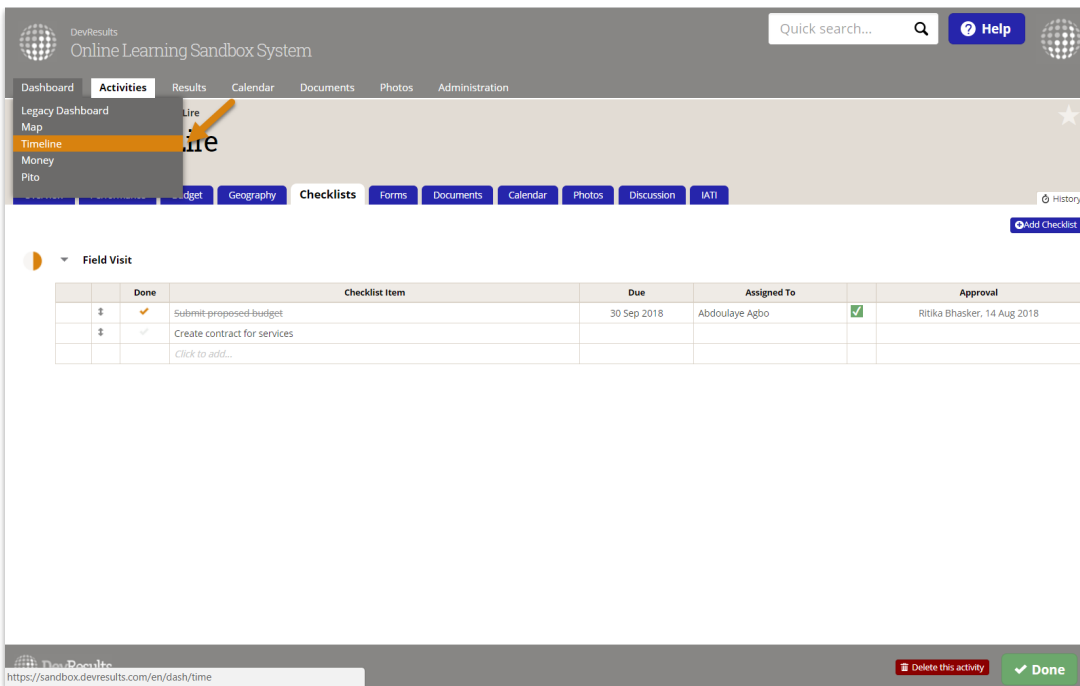
To save a checklist template, click the "**Save as checklist template**" button on the right-hand corner.



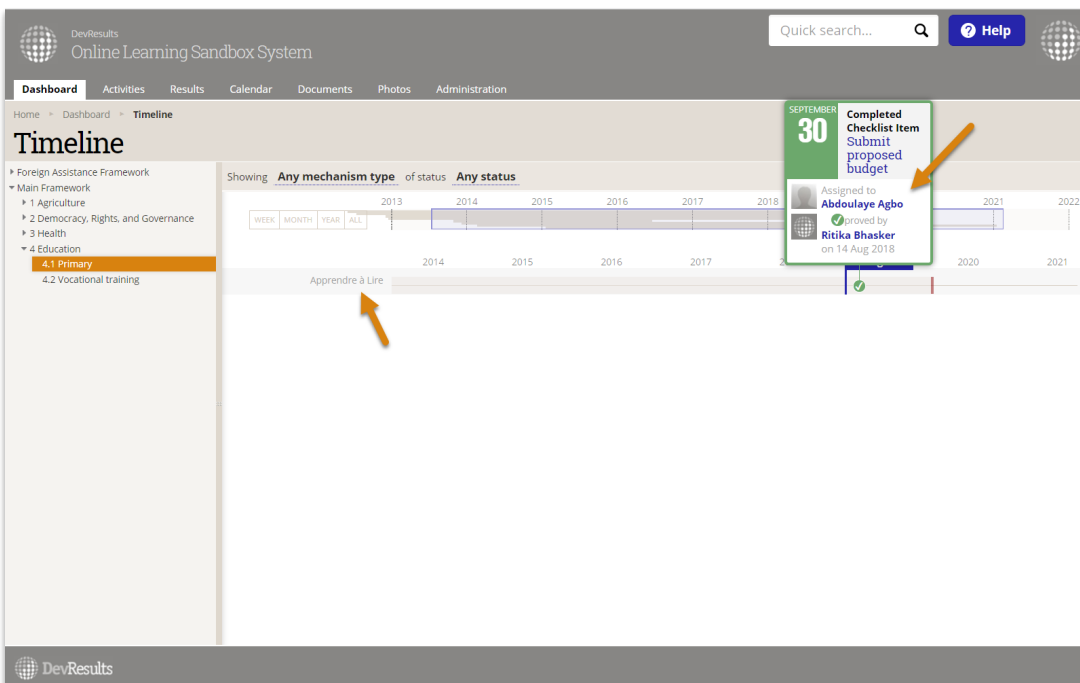
To use a template, click on "**+ Add Checklist**" and select the saved template from the dropdown menu.



To view a timeline of activity tasks, go to Dashboard > Timeline from any DevResults page.



Navigate to your activity by selecting the part of the results framework that relates to the activity. Next to your activity, you can see a timeline that includes each task in that activity's task lists, who is responsible for the task, if it's incomplete, complete, or overdue, and who approved completion of the task. Click on the name of the task to return to the list of checklists for that activity.



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