# INL DevResults User Guide: Checklists (INL Users)

# *When to Use a Checklist?*

Create checklist items when there is a milestone that can be checked off in a "to-do" list fashion. The checklist item should be a simple yes/no indicator that will be complete within a certain time frame. It should also only be reported as "completed" once during the lifespan of the project.

Do not create a checklist item for indicators that require periodic, numeric reporting (rather than a one-time "yes" when complete). If a milestone needs multiple disaggregations (e.g. by sex and location), has specific targets, or occurs regularly, then it should remain an indicator and *not* be added to the checklist.

Checklists, like regular indicators, are attached to a project and are included along with any comments in the automated performance report.

# 1. Navigate to Projects

To begin, navigate to the left top of the homepage and hover over the **Program Info** tab to select **Projects.**

# 2. *Find a Project*

Next, find the project for which you want to view, edit, or create checklists. If you know the project name, type it in the search bar indicated below to filter the project list. Alternatively, you can use the filter menu on the left side of the screen to filter projects by Office/Section and choose the appropriate project.

# 3. Select a Project

Next, click to open the project for which you want to want to view, edit, or create checklists. To do this, click on the project name, as shown below. This will open the project page.

| Data | **Program Info** | Tools | Administration | Bookmarks |
|---|---|---|---|---|

Home ▸ Program Info ▸ Projects

**1** of 152 projects shown

◀

demo k9 ✕

⚙ ▾

▸ Geography

▾ Status
- ☐ Active
- ☐ Closed
- ☐ Closed - Monitoring ongoing
- ☐ Forthcoming

▸ Mechanism

▸ Framework

▸ INL Bureau-wide Tag

▸ Program-specific Tag

▸ Staff

▸ Primary Implementing Partner Organization

▾ Office|Section

0 projects

| ★Bookmark | Assign indicators | Assign program-specific tags | Assign INL bureau-wide tags | Assign reporting periods by dates | Assign users | Change status | 🗑 Delete |
|---|---|---|---|---|---|---|---|

| ☐ | Name ↑ | Ref # | Start Date | Status |
|---|---|---|---|---|
| ☐ | DEMO Project: K9 Units | DEMO_K9_Project | 1 Jan 2017 | Closed |

1 project

DevResults

⊕ New Project

# 4. *Click the Checklist Tab*

To add a checklist item, click the **Checklists** tab from the blue tab options underneath the project title, as shown below.

# 5. *Create a Checklist*

To create a checklist, click the blue "**Add Checklist**" button in the top right corner of the Checklist tab. A box will pop up with "Empty checklist" pre-selected as the "Template" option.

Leave the selection as-is and enter a name for the checklist. Usually, it will be something like "Milestones – *Project Name*," however you can adjust as necessary depending on the items included.

Once you have entered a name, click the green "**Add checklist**" button.

# 6. *Enter checklist items and dates, and assign users*

To enter checklist information, simply click in the box below each relevant column header. Ensure you click out of the box once you are finished typing in order to auto-save. Fill in the following sections accordingly:

**Checklist Item Column:** Describe the milestone with enough detail so that any user assigned to the project can understand its intent.

**Comment:** This can be used to describe progress toward the milestone over time, or enter any contextual details.

**Due:** Enter the date that the milestone should occur by.

**Assigned to:** Enter the user that will be responsible for reporting progress on the milestone within DevResults.

Home ▸ Program Info ▸ Projects ▸ **DEMO Project: K9 Units**
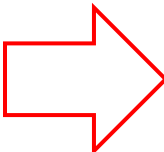
## DEMO Project: K9 Units
INL/KM

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

**Milestones**

| | Done | Checklist Item | Comment | Due | Assigned To |
|---|---|---|---|---|---|
| | ✔ | The partner government establishes a rigorous certification process the meets or exceeds Natio... | Objective 3: The partner government takes cani... | 30 Jun 2023 | Amanda Leigh Pinkston |
| | ✔ | Partner country data collection and analysis procedures meet INL/KM data quality standards | Objective 13: The partner government collects ... | 30 Sep 2024 | Amanda Leigh Pinkston |
| | | *Click to add...* | | | |

# 7. Report within a Checklist

Each quarter, the assignee for the relevant checklist item should ensure information is up to date. When an item is completed, click the gray checkmark. It will become orange (see below). Enter any relevant context in the comment column, and ensure you click out of the box to save.

You can add additional checklist items at any time by selecting the blank box at the bottom that says "*Click to add*"



Users should provide updates in the "Comments" column, if relevant, for quarterly reporting, even if the milestone is not yet 'done.'



**The results will be automatically pulled into the relevant performance report.**