

Checklist Templates

Last Modified on 12/02/2022 5:30 pm 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](#).

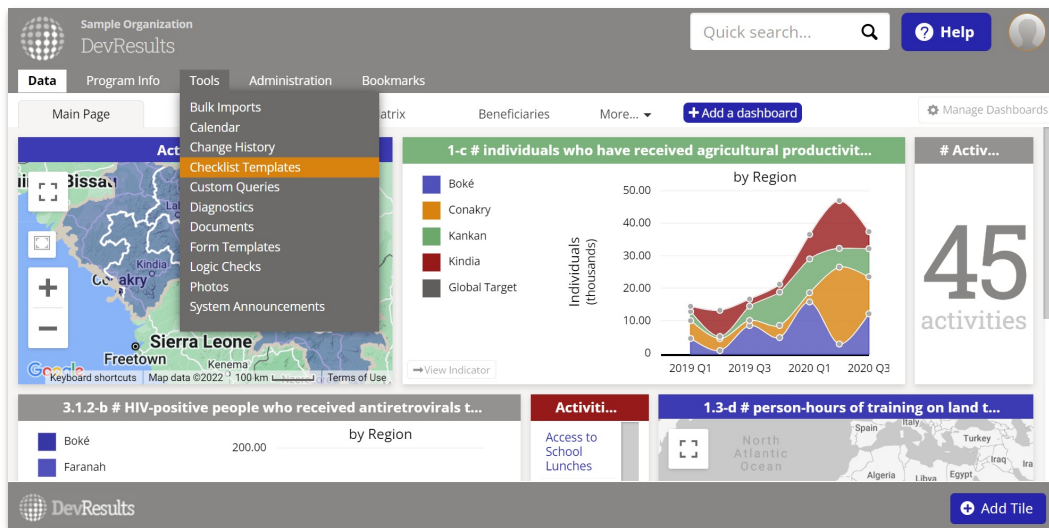
You might have a checklist that you'd like to use multiple times, for multiple activities, or for any sequence of tasks that need to be done frequently or regularly. For this, you can create a checklist template. A checklist template lets you save a single list of tasks, then to add that checklist to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

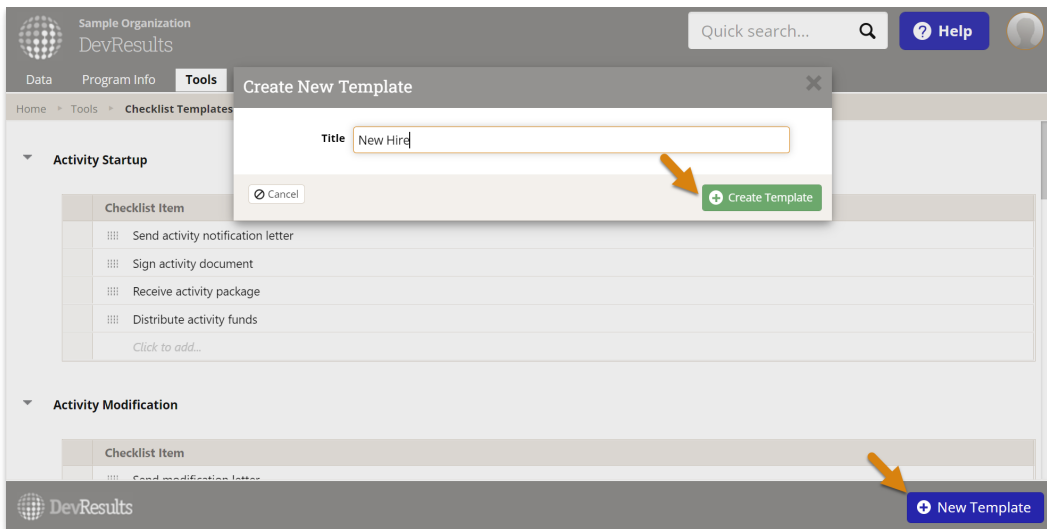
Creating a checklist template from scratch

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

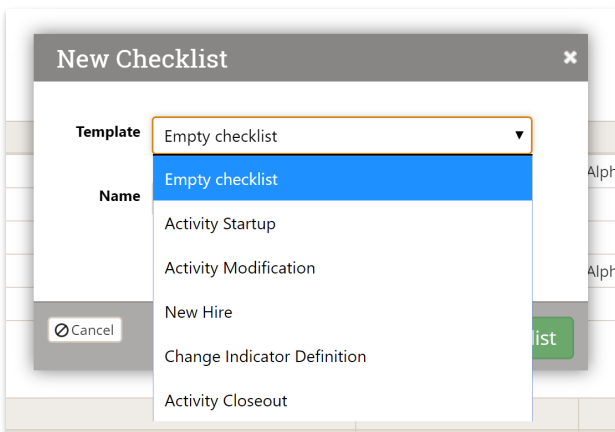


The screenshot shows the DevResults dashboard interface. At the top, there is a search bar and a 'Help' button. Below the search bar, there are navigation tabs: 'Data', 'Program Info', 'Tools', 'Administration', and 'Bookmarks'. The 'Tools' menu is open, showing options like 'Bulk Imports', 'Calendar', 'Change History', 'Checklist Templates' (highlighted in orange), 'Custom Queries', 'Diagnostics', 'Documents', 'Form Templates', 'Logic Checks', 'Photos', and 'System Announcements'. The main content area displays a dashboard with several charts and maps. The top chart is a line graph titled '1-c # individuals who have received agricultural productiv... by Region', showing data for Boké, Conakry, Kankan, Kindia, and a Global Target from 2019 Q1 to 2020 Q3. To the right of this chart is a large number '45' with the text 'activities'. Below the main chart are two smaller charts: '3.1.2-b # HIV-positive people who received antiretrovirals t...' and '1.3-d # person-hours of training on land t...'. The bottom of the dashboard features a 'DevResults' logo and an 'Add Tile' button.

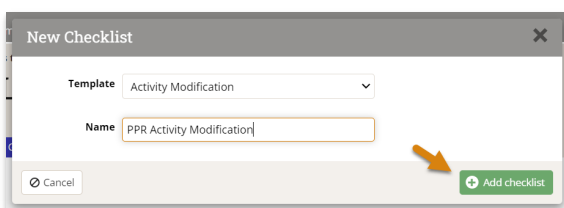
The Checklist Templates page looks similar to the activity checklist page, but with fewer available fields. To create a template, click the blue **New Template** button and give your new checklist template a name. After clicking on the green **Create Template** button, type new checklist items or tasks in the "Click to add..." field. You can also add a default assignee, if appropriate (if not, just leave that column blank).



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



Optionally, you can edit the checklist name from the template default, then click the **Add Checklist** button.



The checklist will be added to the page page. You can then assign users and due dates to each task, just like with any other **checklist**.

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 name and checklist items to the checklist templates page. You can then go to **Tools > Checklist Templates** to make any further refinements.

Sample Organization
DevResults

Quick search...

Data **Program Info** Tools Administration Bookmarks

Home > Program Info > Activities > Access to School Lunches

Access to School Lunches

Kunkle Associates

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

New Proposal

Done	Checklist Item	Comment	Due	Assigned To	Approval
<input checked="" type="checkbox"/>	☐☐☐ Create Budget	Details should come fro...	1 Mar 2023	Aissatou Devers	<input checked="" type="checkbox"/> Eulogie Gbonoma, 2 Dec...
<input checked="" type="checkbox"/>	☐☐☐ Draft M&E Plan	Consult SOP in documen...	1 Apr 2023	Mamadi Dibba	<input type="button" value="Approve"/>
<input checked="" type="checkbox"/>	☐☐☐ Submit for approval	CC team members in Dis...	1 May 2023	Safiatou Ka	
	<i>Click to add...</i>				

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