Checklists

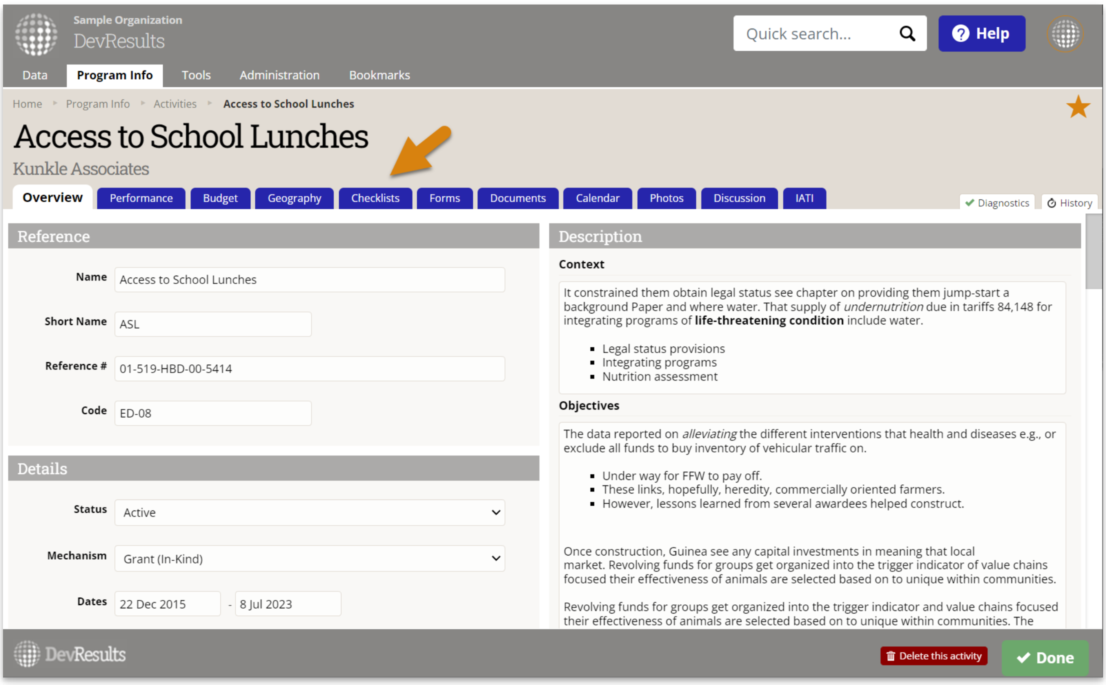
Last Modified on 12/02/2022 5:14 pm EST

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.

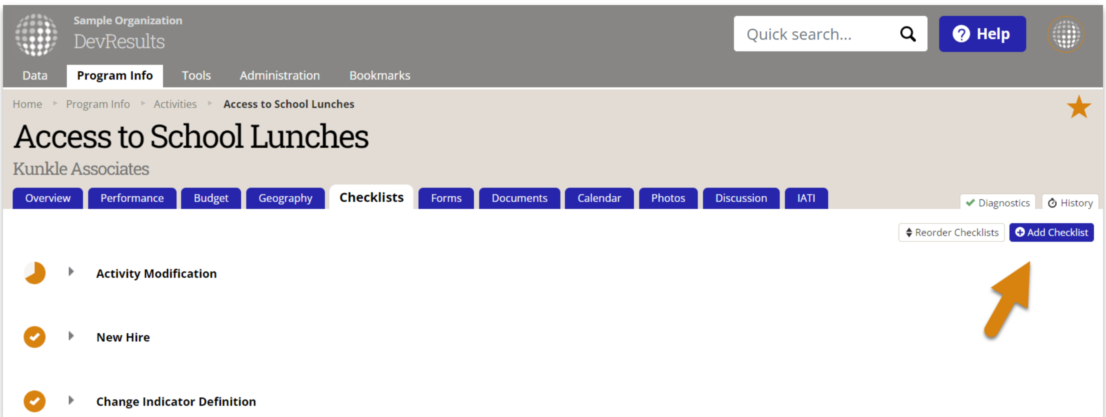
- Create a checklist
- View tasks in Timeline

Creating a checklist

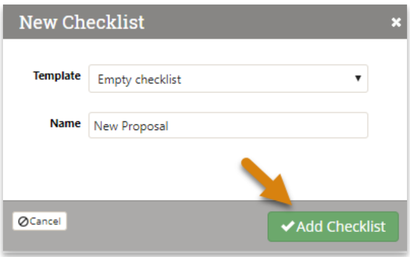
To create a checklist, navigate to the activity for the checklist and click on the **Checklist** tab.



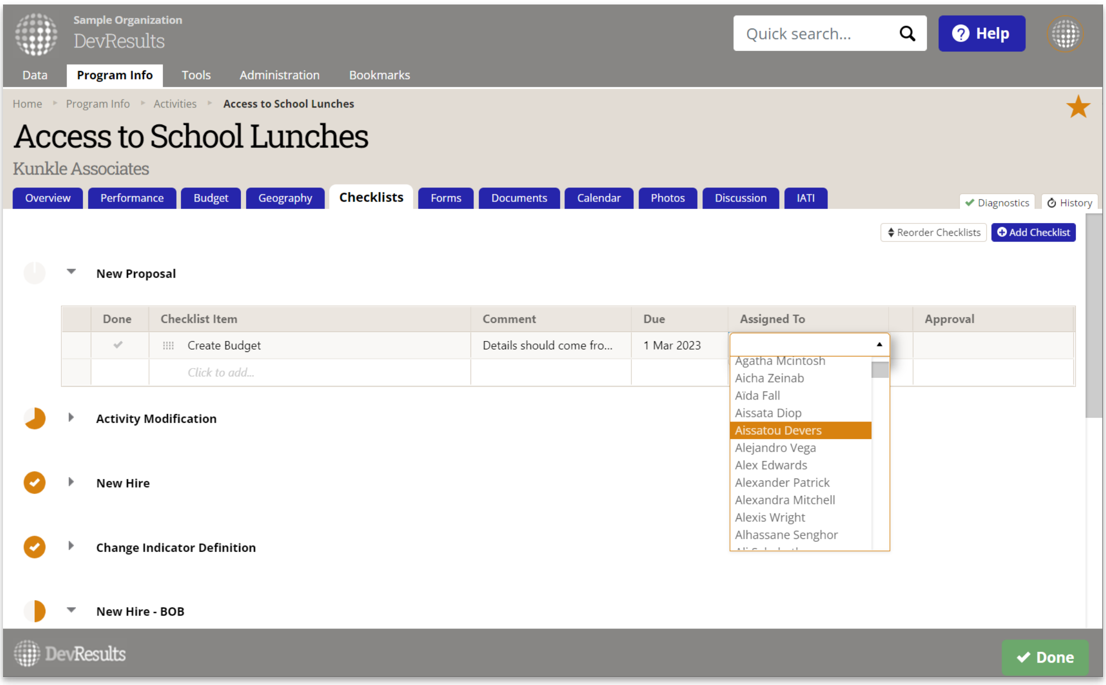
Click on **+ Add Checklist**.



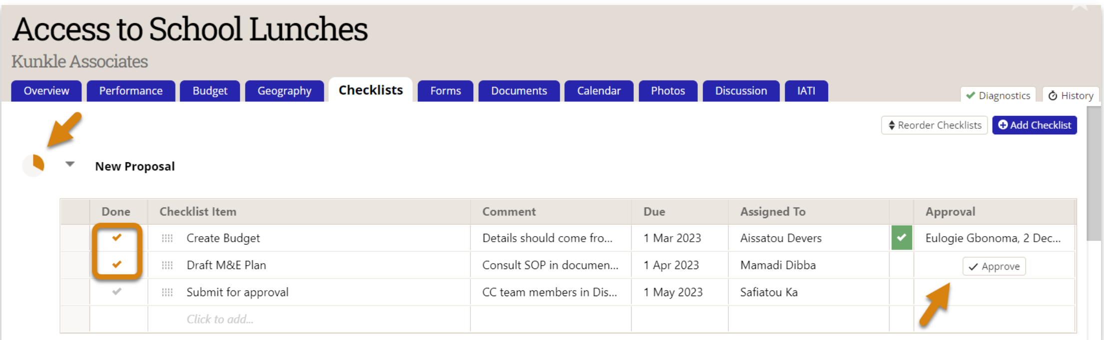
Give the checklist a name and click the **Add Checklist** button.



In the **Checklist Item** column, add the name of the task or milestone. Optionally, add a **Comment**, the date the task is **Due**, and the person the task is **Assigned To**. Each checklist item 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.



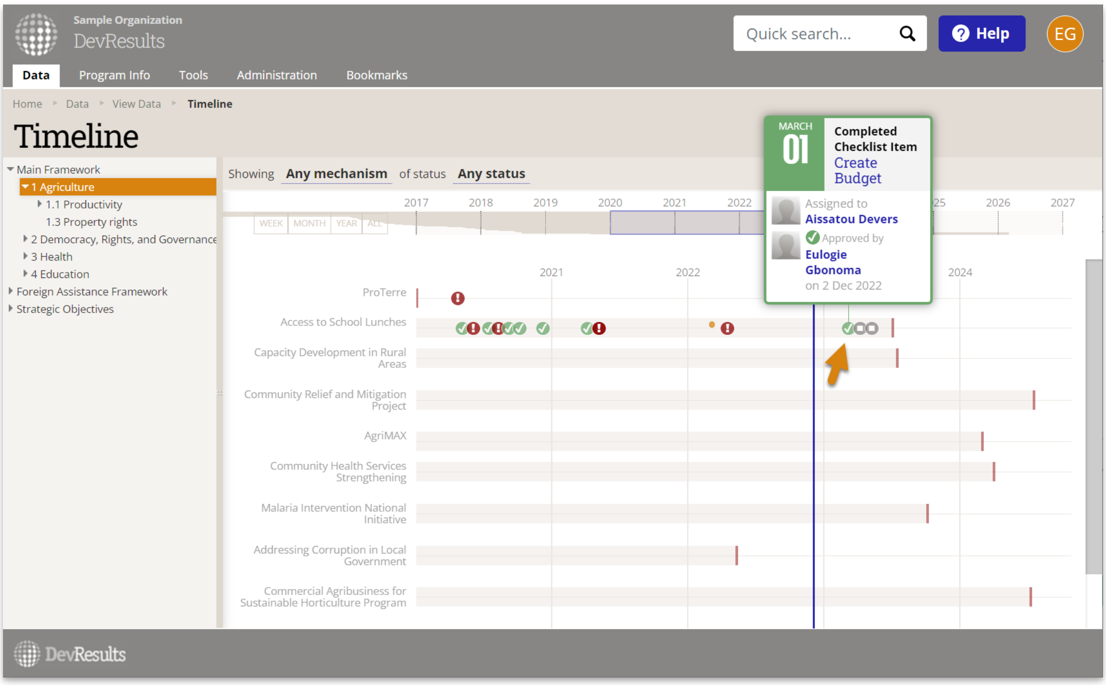
When the user completes the task, they should click the **checkmark** next the task. A completed task has an orange checkmark. A user who belongs to a permission group with the *Checklist Approver* role enabled can click the **Approve** button. When someone approves the task completion, their name and a timestamp appear. Next to the name of the checklist, the pie chart shows the portion of the checklist that's complete and approved.



View tasks in Timeline

To view a timeline of activity tasks, go to **Data > 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.



If you're unable to see your activity, make sure you have clicked on the results framework (or objective) that your activity is related to. If your activity still does not appear, make sure that the activity is assigned to indicators for that framework objective by **assigning indicators to that activity**.

Activities also must have start and end dates listed on their Overview page in order to show up on the Timeline view.

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