



How to: Create a Checklist

11.2

February 2026

DOCUMENT ACCESS

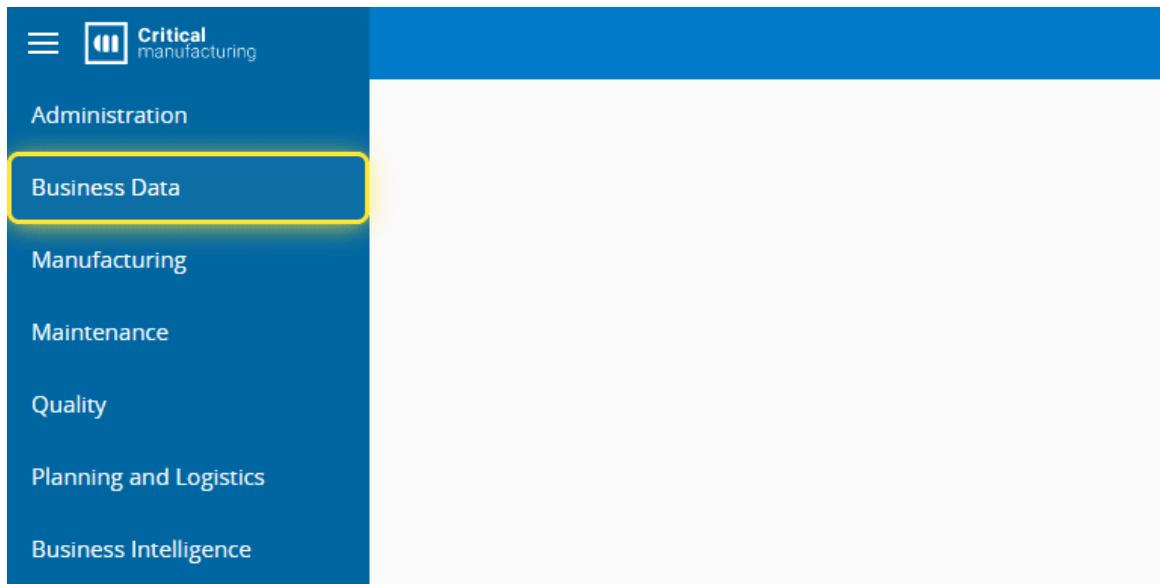
Public

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How to: Create a Checklist

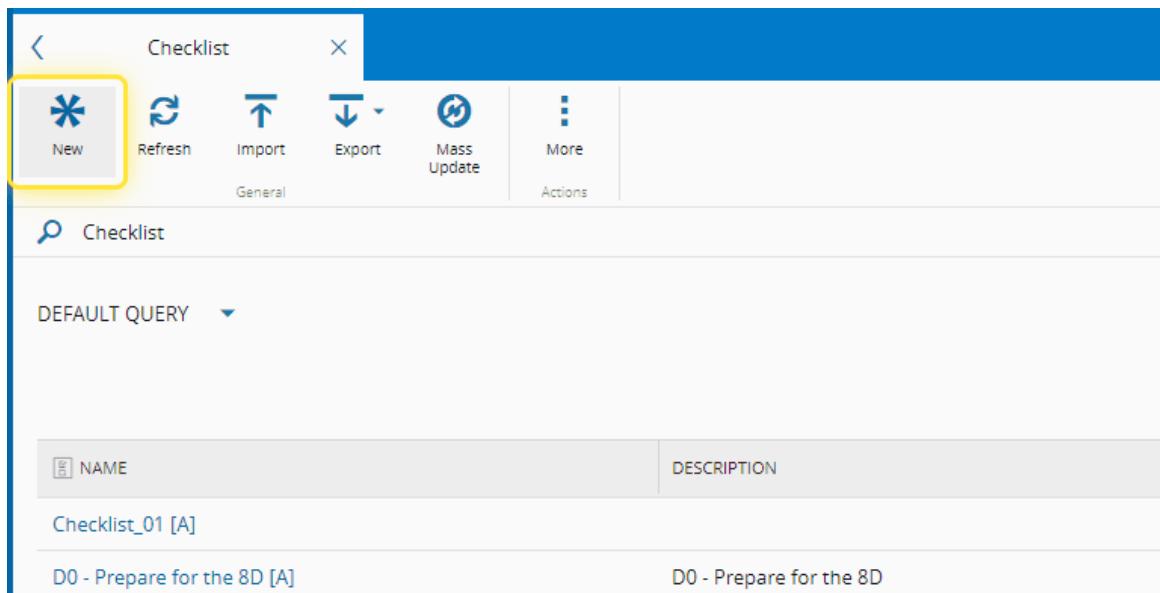
1. Go to the Business Data menu.



2. Select the Checklist entity.



3. Select the New button.



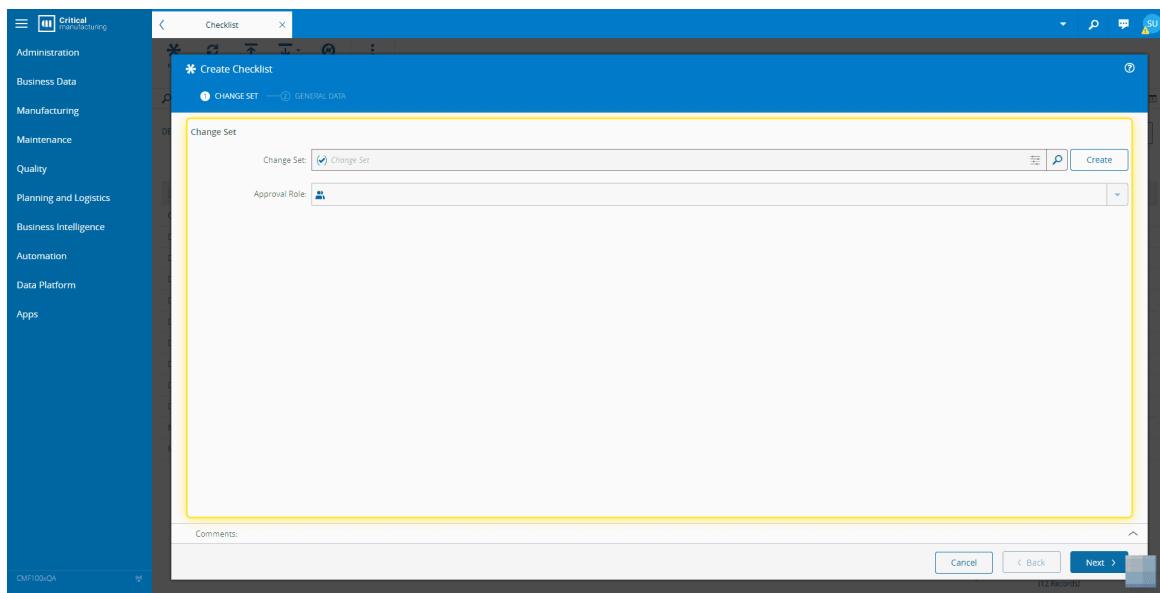
Checklist

DEFAULT QUERY ▾

NAME	DESCRIPTION
Checklist_01 [A]	D0 - Prepare for the 8D

4. Under the Change Set tab, select an existing Change Set or Create a new one.

For more information, see [Create Change Set - Critical Manufacturing Documentation Portal](#)



Checklist

Create Checklist

CHANGE SET GENERAL DATA

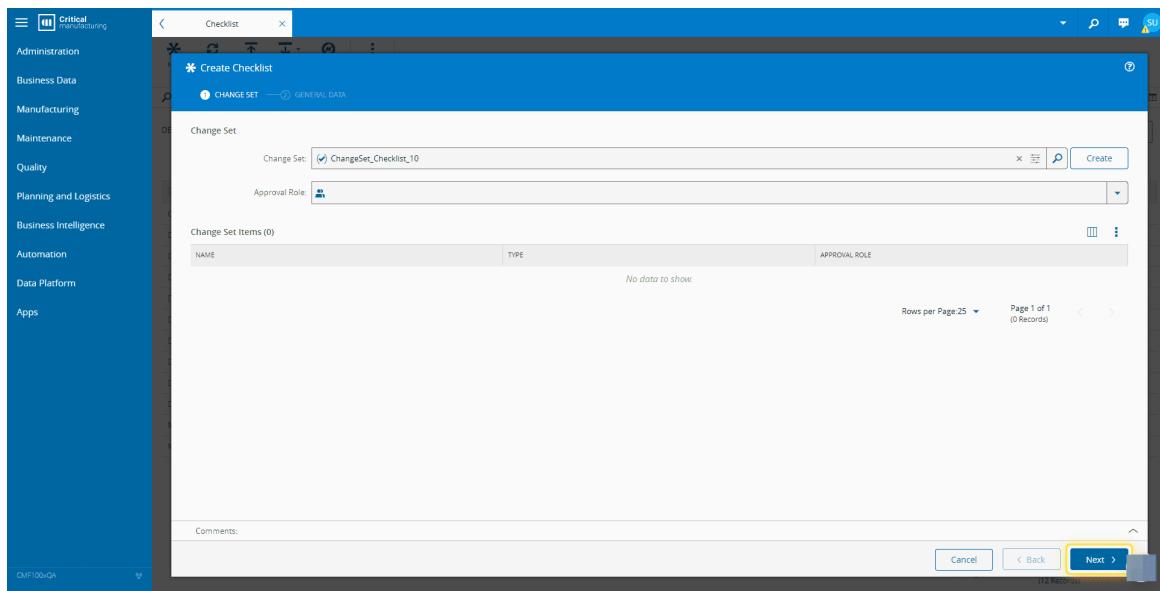
Change Set: Change Set

Approval Role:

Comments:

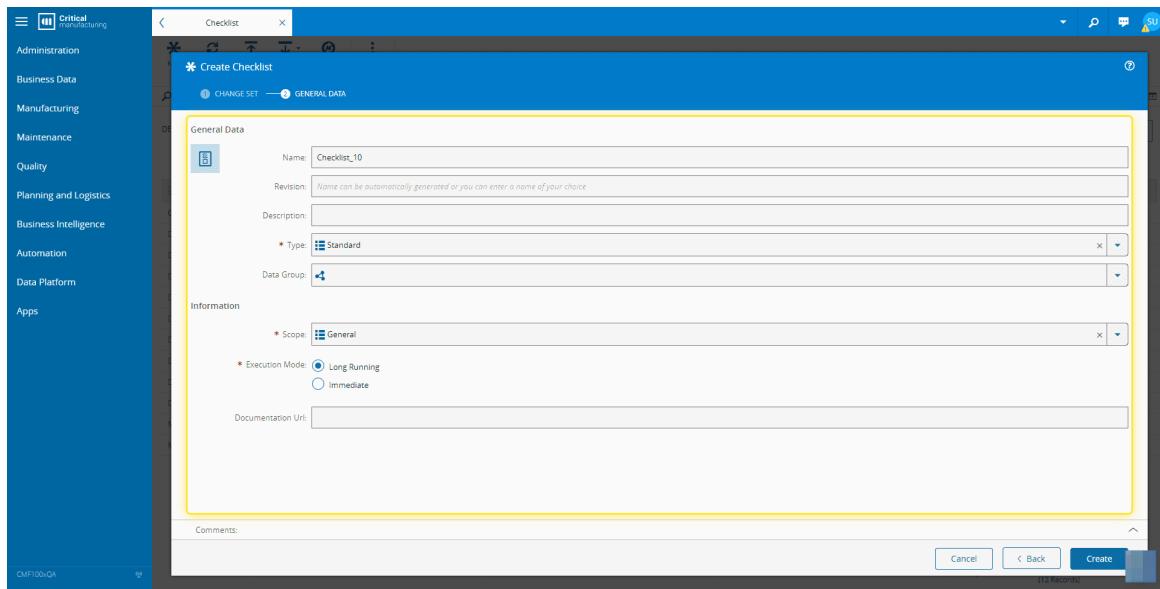
Cancel < Back **Next >**

5. Select the Next button.

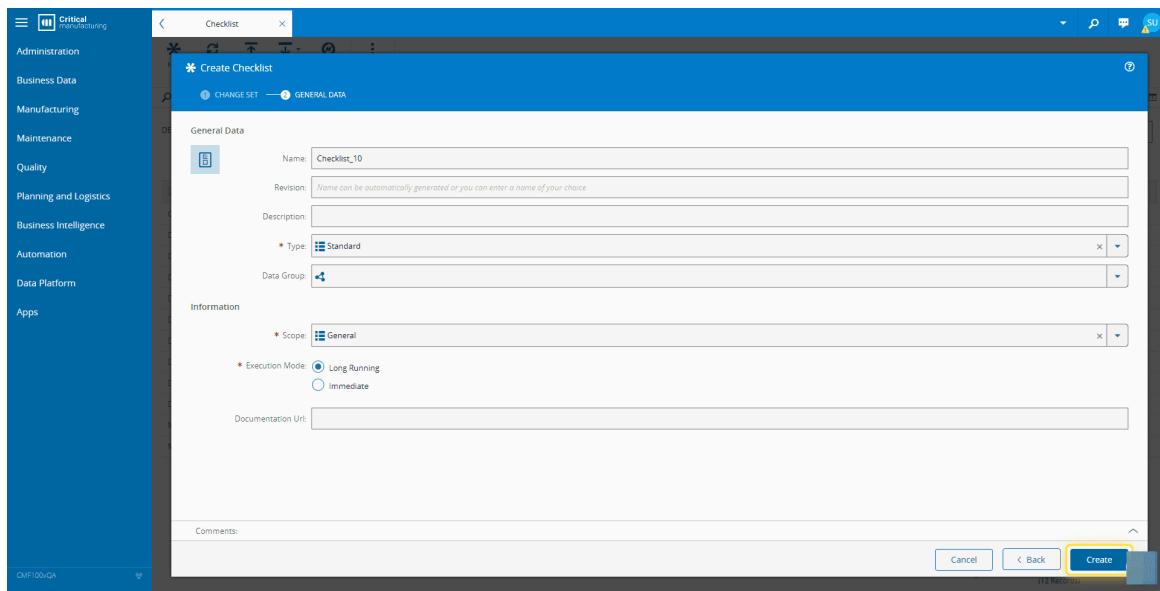


6. Under the General Data tab, complete the necessary fields.

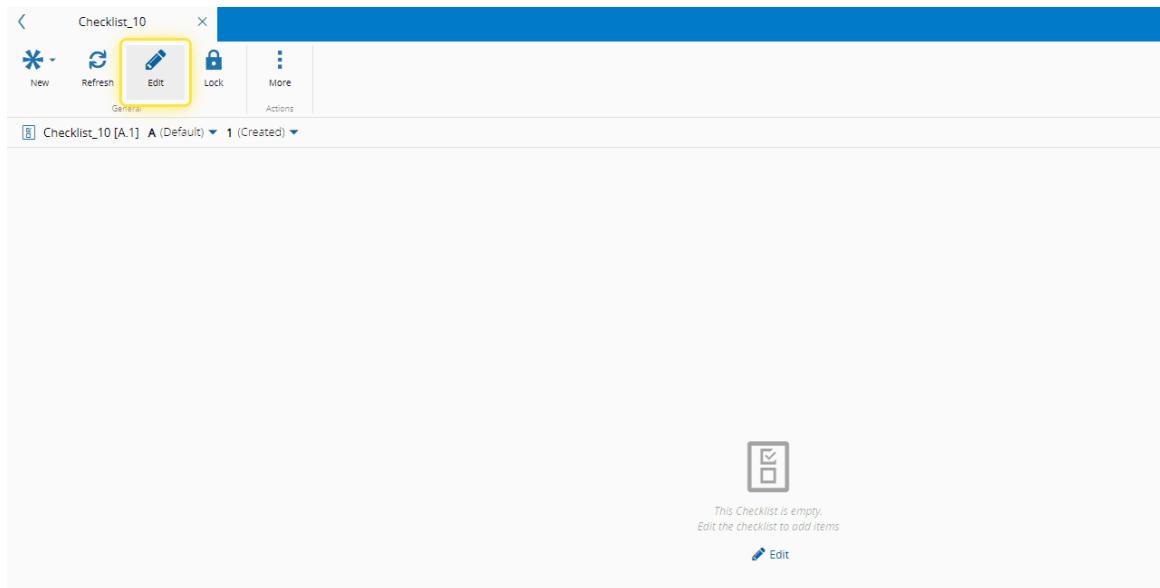
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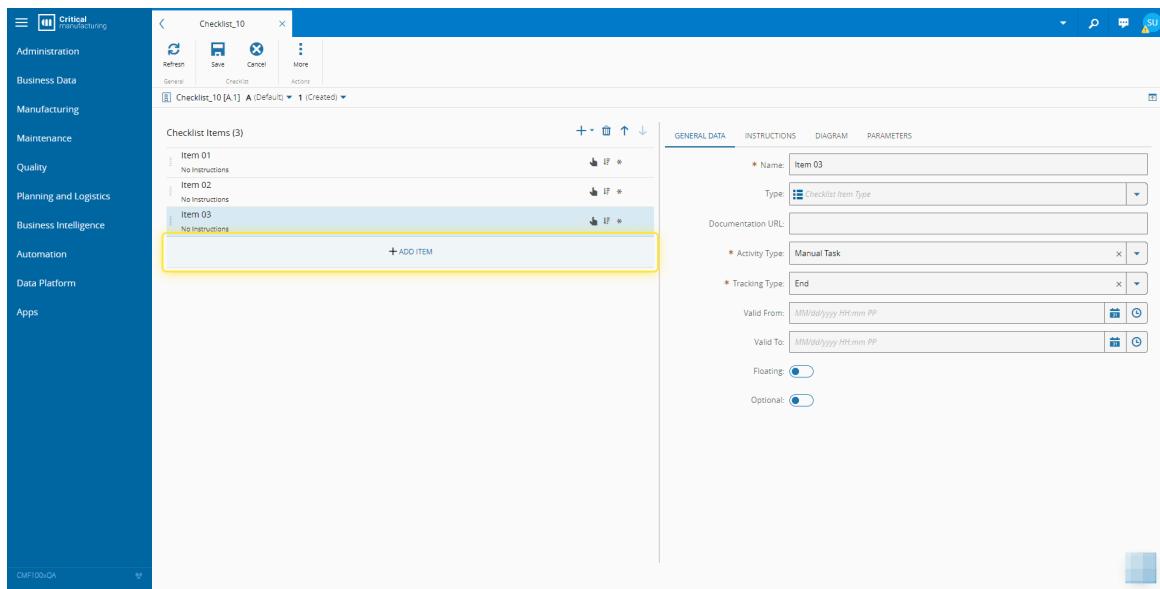
7. Select the Create button.



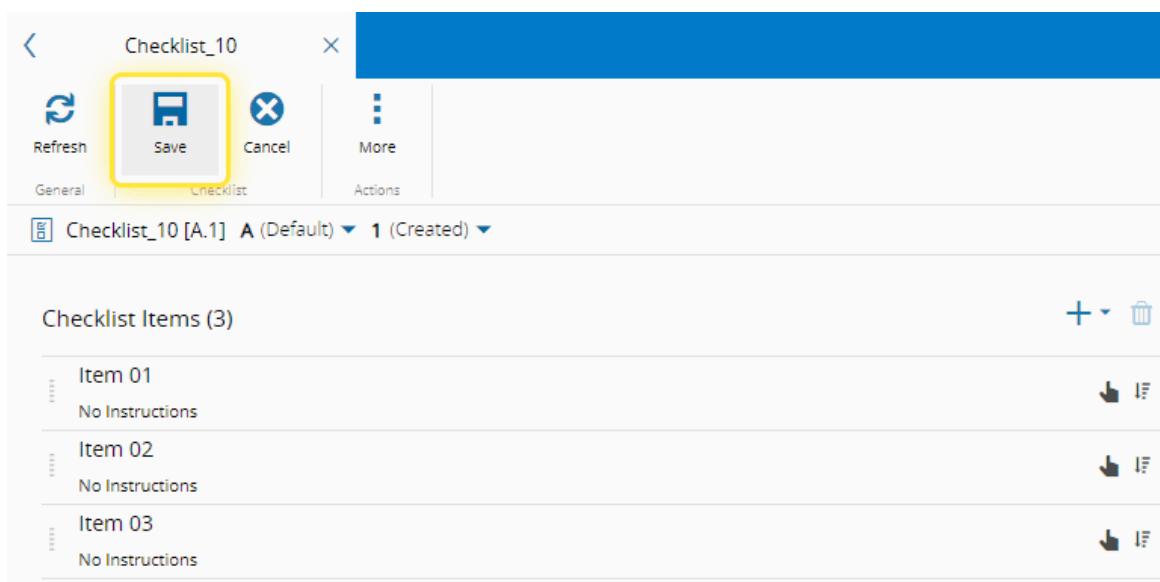
8. Select the Edit button.



9. Depending on the selected configurations, add items to your Checklist, and complete the necessary fields on the right panel.



10. And Save them.





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