

How to: Create a Checklist

11.2

February 2026

DOCUMENT ACCESS

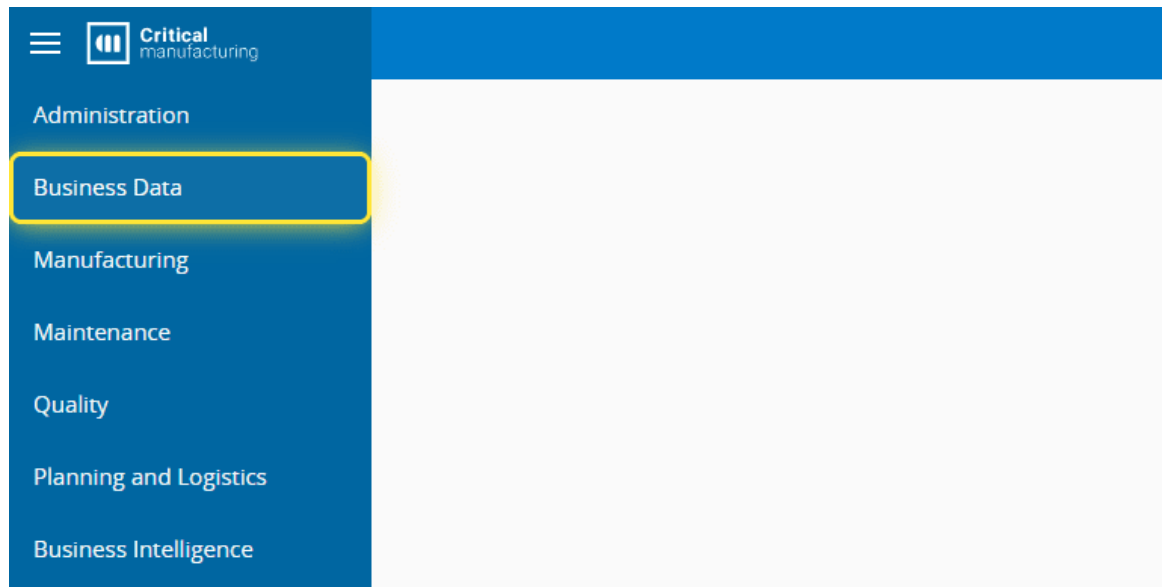
Public

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How to: Create a Checklist

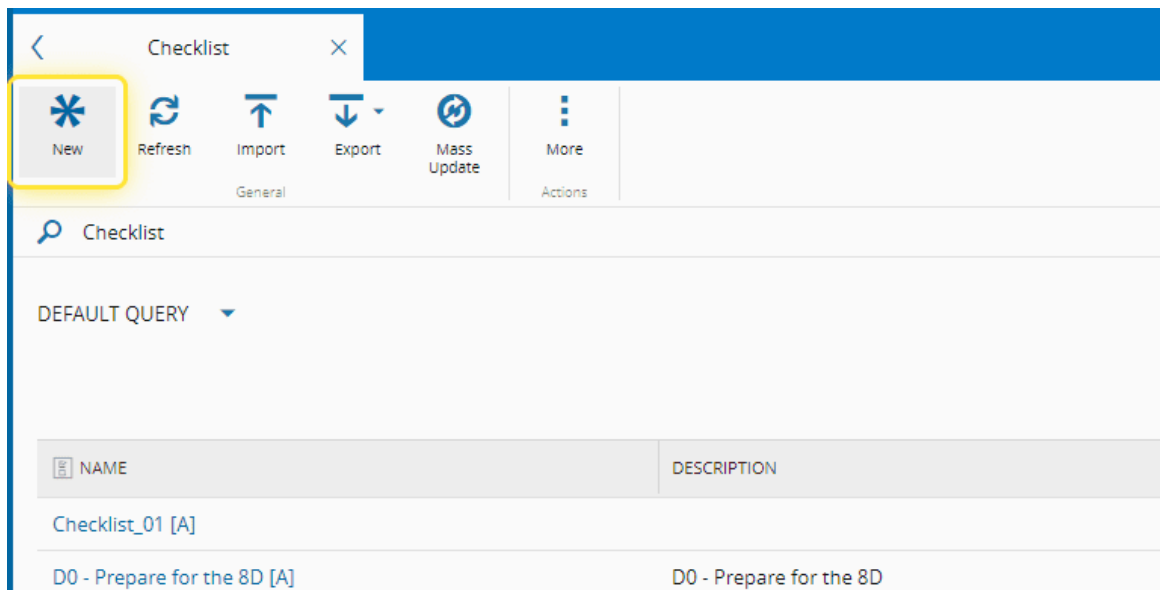
1. Go to the Business Data menu.



2. Select the Checklist entity.

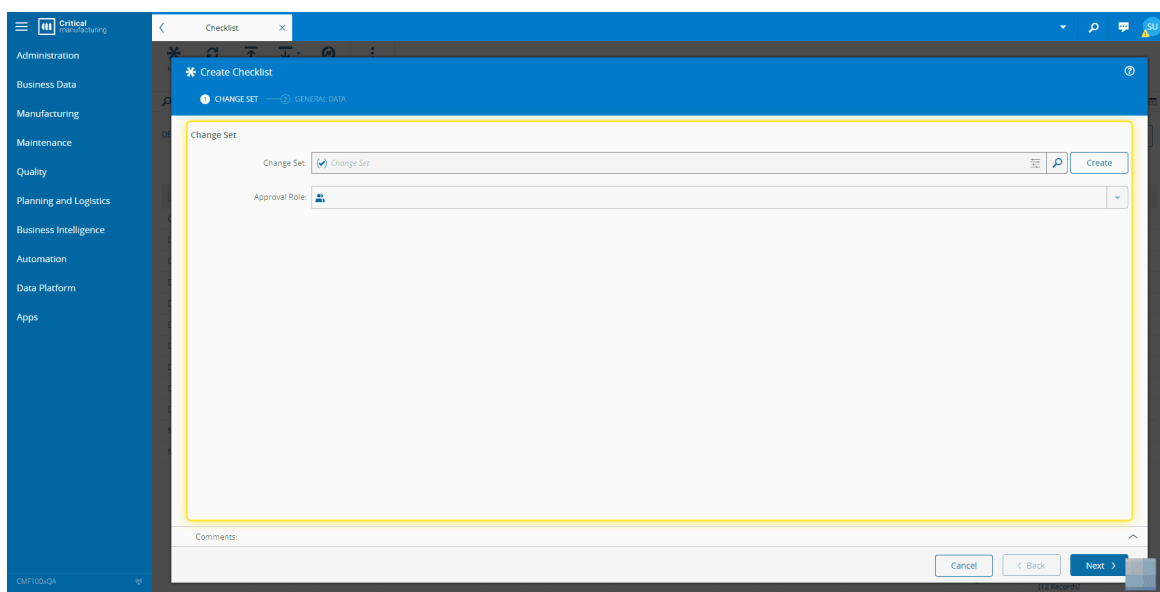


3. Select the New button.

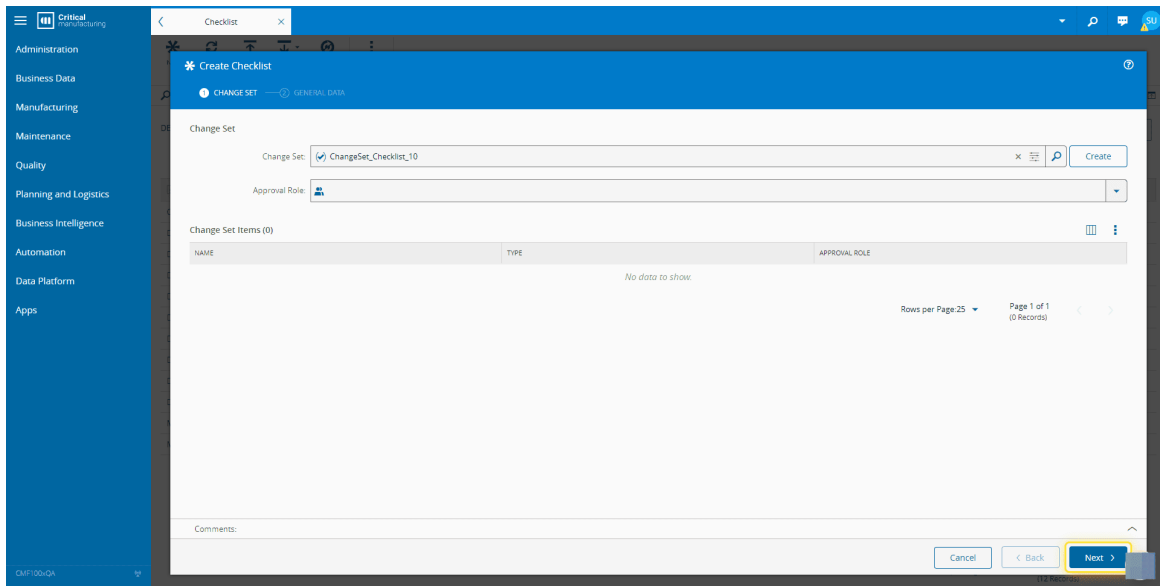


4. Under the Change Set tab, select an existing Change Set or Create a new one.

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

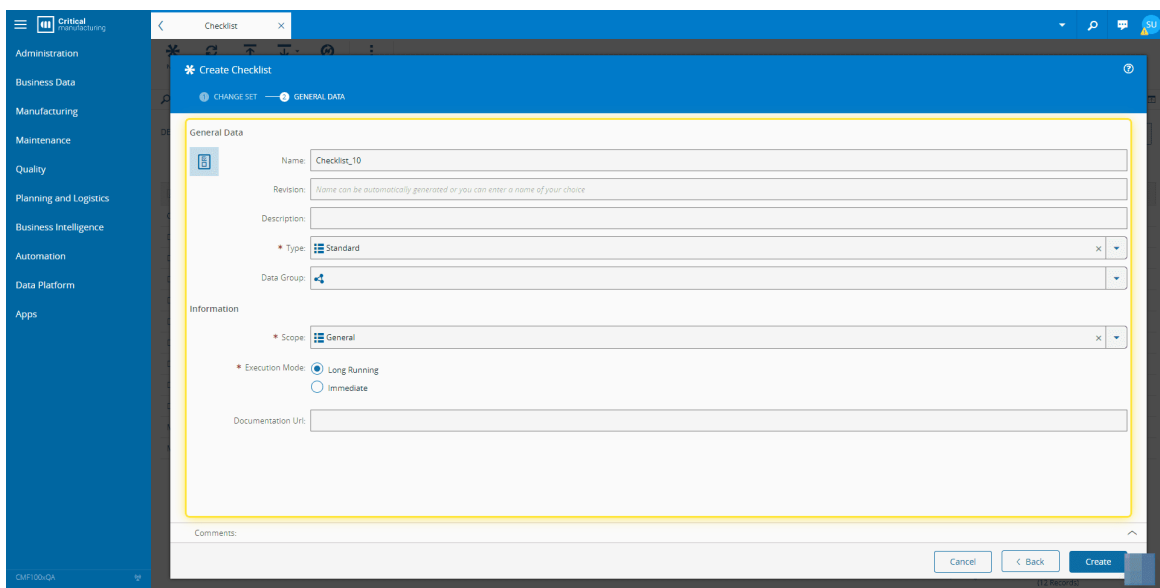


5. Select the Next button.

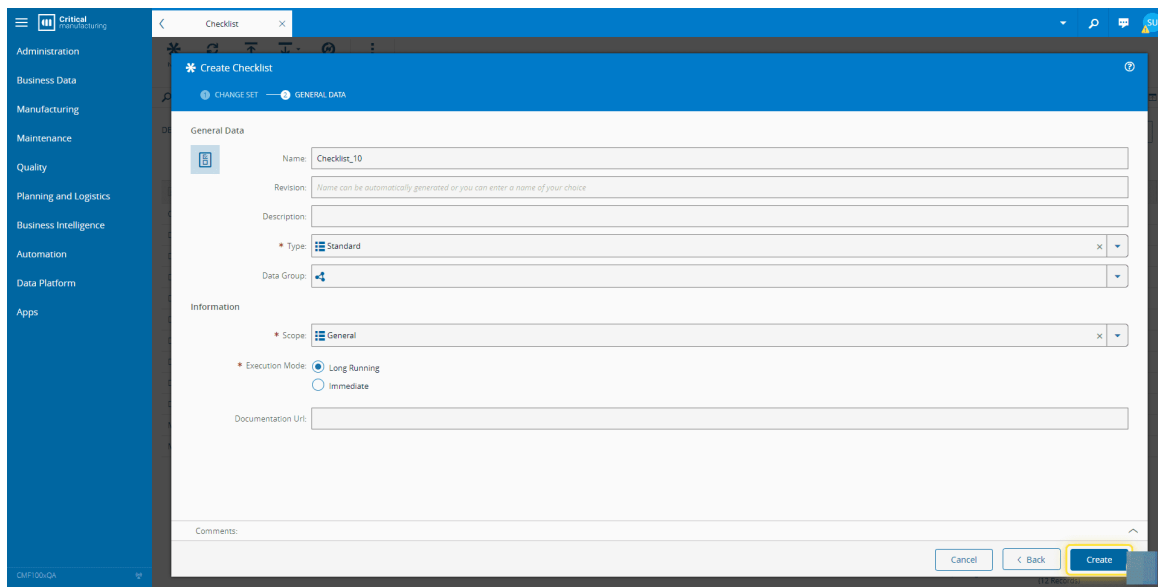


6. Under the General Data tab, complete the necessary fields.

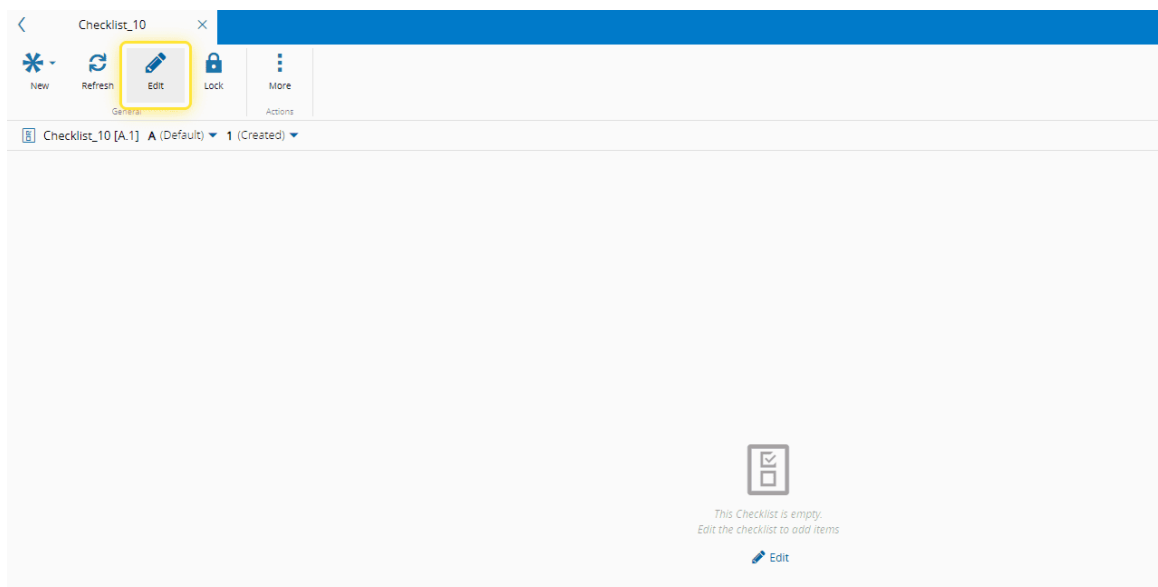
For more information, see [Create Checklist - Critical Manufacturing Documentation Portal](#)



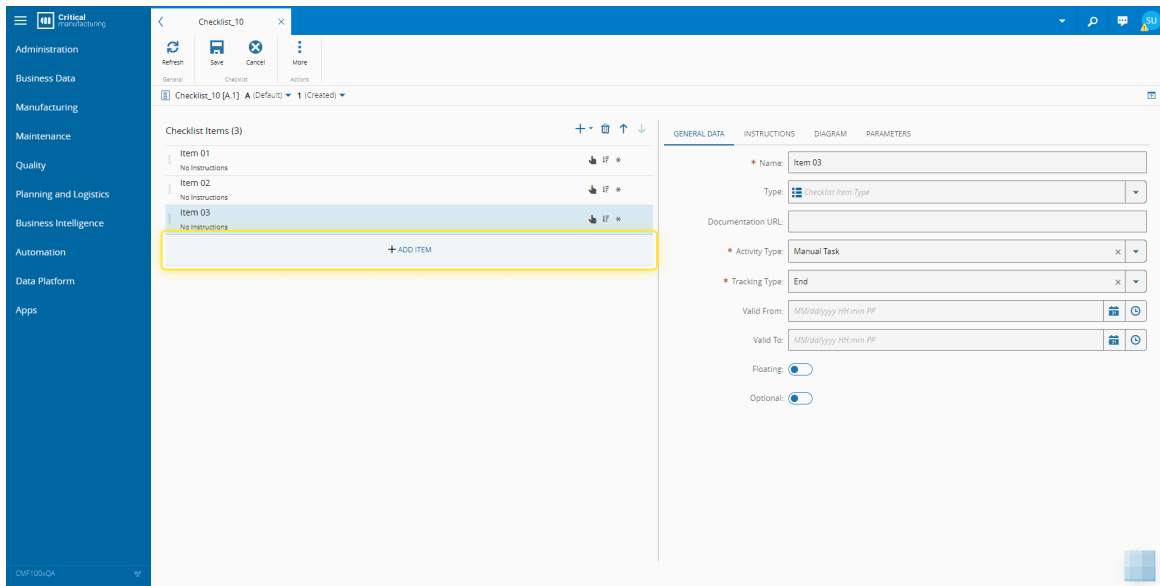
7. Select the Create button.



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.



Checklist_10

Refresh Save Cancel More

Checklist_10 [A.1] A (Default) 1 (Created)

Checklist Items (3)

Item	Instructions	Actions
Item 01	No Instructions	Like, List
Item 02	No Instructions	Like, List
Item 03	No Instructions	Like, List

+ ADD ITEM

GENERAL DATA INSTRUCTIONS DIAGRAM PARAMETERS

Name: Item 03

Type: Checklist Item Type

Documentation URL:

Activity Type: Manual Task

Tracking Type: End

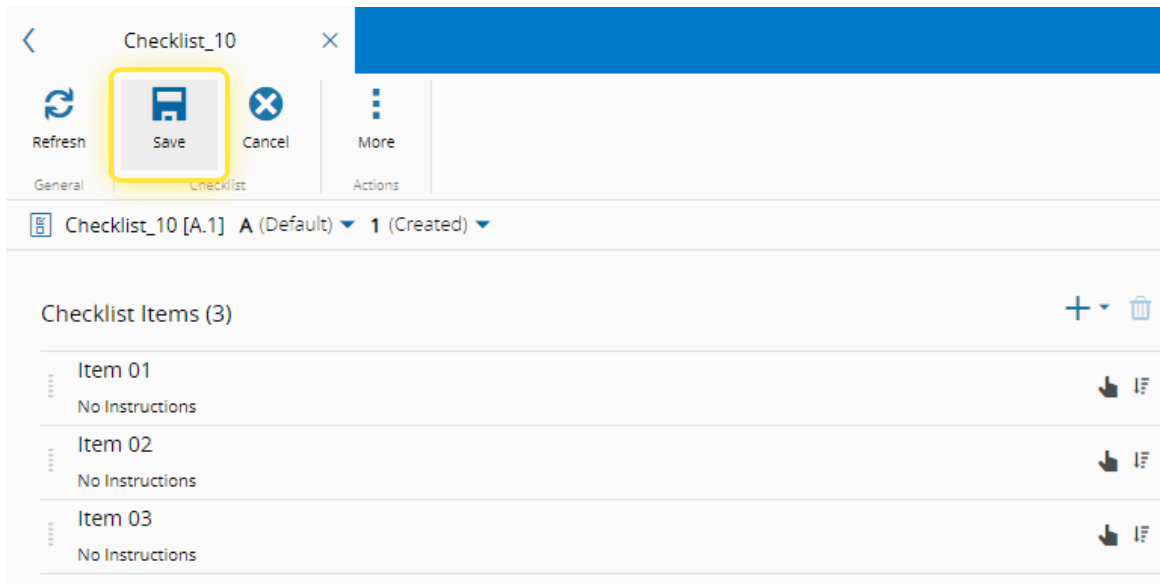
Valid From: MM/dd/yyyy HH:mm PP

Valid To: MM/dd/yyyy HH:mm PP

Floating: ☐

Optional: ☐

10. And Save them.



Checklist_10

Refresh Save Cancel More

Checklist_10 [A.1] A (Default) 1 (Created)

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Item 01	No Instructions	Like, List
Item 02	No Instructions	Like, List
Item 03	No Instructions	Like, List



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