



# GearLog

## GearLog Onboarding Checklist

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## Introduction

This document is aimed at new GearLog users and identifies the steps needed to make the most out of GearLog and to migrate your data into the platform smoothly. **We strongly recommend you carefully read this checklist and think about the topics mentioned before you enter too much gear.**

Any questions please contact us for help:

- GearMax users contact us at the dedicated support mailbox: [support@gearlog.org](mailto:support@gearlog.org)
- GearPro and GearPlus users at the community support mailbox: [info@gearlog.org](mailto:info@gearlog.org)

The [GearLog FAQ](#) is a great resource for more information on many of the topics mentioned in this document:

## The Checklist

#	Item	GearPro	GearPlus	GearMax
1	Update your profile and set the communications preferences and account defaults for the main admin account.	Yes	Yes	Yes
2	On the Settings menu choose Activities and decide what activities (sports) you want to manage gear for. It is always worth including the 'General Purpose' activity.	Yes	Yes	Yes
3	On the Settings menu choose Categories and remove any unwanted categories from each activity. If you identify missing categories that you would like, then propose them to us for inclusion in the platform	Yes	Yes	Yes
4	Decide how you will manage serial numbers. Will you just generate them yourself? Will you have GearLog generate them? Do you want to	Yes	Yes	Yes

#	Item	GearPro	GearPlus	GearMax
	use your existing serial numbers for current gear but switch to having GearLog generate them for new gear? Do you want the GearLog generated serial numbers to match (or at least match as closely as possible) your format? When you have formulated your approach go to Settings -> 'Serial Number Format' to setup the format for your serial numbers. You really want to get your approach here clear before you add loads of gear!			
5	Are you going to track your personal qualifications (i.e. when you are using GearLog for yourself rather than for a whole company or organisation)? If so, go to Settings -> Qualifications and select the qualifications that are relevant to your activities and global location. If you identify missing qualifications that you would like, then propose them to us for inclusion in the platform	Yes	No	No
6	Are you going to track your team/colleagues/members etc Qualifications (i.e. when you are using GearLog for a whole company or organisation)? If so, go to Settings -> Qualifications and select the qualifications that are relevant to your organisation and global location. If you identify missing qualifications that you would like, then propose them to us for inclusion in the platform	No	Yes	Yes
7	Are you going to use GearLog to manage advance reservation of gear? If so, you might like to setup the information shown to users when they are reserving gear by going to Settings -> Reservation Settings to configure that.	No	Yes	Yes
8	Do you want to break your GearLog up into Sites (e.g. different facilities you have, places you operate, clients you inspect etc)? If so, go to Settings -> Sites and setup your Sites so that you can filter and	No	Yes	Yes

#	Item	GearPro	GearPlus	GearMax
	report at site level. You really want to get this done before you add/import loads of gear!			
9	Do you have other people who need access to your log (e.g. your team within a company, other members within a club, external parties who need access etc)? If so head to Settings -> Linked Users and set them up. There are a number of permissions you can assign to control access to what they can do so have a think about what types of users you have and what you want them to be able to do.	Yes	Yes	Yes
10	Would you like specific users (item 9) to get the inspection alerts related to specific categories of gear (item 2) at specific sites (item 8)? This is a very powerful feature to ensure the right people get the right information. If so head to Settings-> Gear Alerts and set that up. You would want to have decided on your Categories, Users and Sites before doing this!	No	Yes	Yes
11	Do you want to be able to share read only access to the log to anyone with a link to it? If so head to Settings -> Share Link	Yes	Yes	Yes
12	Now, think about how you are getting you gear into the system. Are you going to key it all in from scratch (perhaps at the same time as having a big audit) or do you already have an extant log in something like a spreadsheet? If you want to import your gear and avoid re-entering it all then have a look at the Import tools on the Tools menu. Check out the file formats and have a think about what is needed to prepare your data. GearMax users can access dedicated help with migration..contact us for that.	Yes	Yes	Yes
13	Finally think about labelling gear. GearLog can generate QR codes which you can scan with your mobile phone camera or the GearLog app to rapidly access gear records. You will need a tough label printer	Yes	Yes	Yes

#	Item	GearPro	GearPlus	GearMax
	(contact us for suggestions). Will you QR code all your gear? Or some of it? For that without a rapid scan label will you write the serial number on or just use an ID mark (like tape, nail polish etc) ?			
14	GearMax users can replace the home page image, change the text on the home page and have their own custom URL. We need to provision these changes for you (you can't do it through the user interface). So, contact us ( <a href="mailto:support@gearlog.org">support@gearlog.org</a> for the dedicated GearMax support team)	No	No	Yes