

Start using Mobaro - The right way

Getting started on a new system is never easy, and can feel a bit overwhelming.

To ease the process, we have compiled the below list, which will lead you on the way to a fully functioning Mobaro setup.

Follow the steps in order, or feel free to skip some, if you already feel comfortable in these areas.

These steps assume that you are logged in with a user, with an administrative role, created by your Mobaro contact. If you have not received such information, please reach out to your Mobaro contact.

1. Start by creating your Users (Read more: [Creating New Users](#))
2. Create your Locations (Read more: [Creating New Locations](#))
3. Create your User Groups and add the correct members (Read more: [Creating User Groups](#))
 - o *User Groups enables you to easily maintain your setup, even when people are joining or leaving your organization.*
4. Create your Location Groups, add the desired Locations and choose the Users/User Groups, that should be able to access the Locations (Read more: [Creating Location Groups](#)).
Note: We always recommends adding User Groups instead of Users to Locations and Location Groups, to ease the long term maintenance.
 - o *Location groups allows you to group your organization into easily manageable subsets.*
5. Upload your manuals or reference documents in the files section (Read more: [Files Part 1: Upload](#))
 - o *Manuals can provide your users with additional information required to perform their checklists.*
6. Create one or more checklists (Read more: [Checklists Part 1: Creating New Checklists](#)) and start adding content (Read more: [Checklists Part 2: Adding Content](#) and [Checklists Part 3: Scoring Your Answers](#))
7. Create at least one schedule for your newly created checklist (Read more: [Creating a Schedule](#))
 - o *Schedules control the frequency of your checklists, decides where they should be performed, and by whom.*
8. You're all set, your checklist is now available for your users, in the Mobaro app!
 - o *Need more information on using the Mobaro app? Look [here!](#)*

While the above steps, will provide you with a very basic working Mobaro setup, you might want to dig in to the more advanced features of the system. These steps are optional, but can provide much additional value to your setup.

- Start creating assignments (Read more: [Assignments](#))
- Setup automatic reporting (Read more: [Notifications](#))
- Add power-users and users with additional access, through Roles (Read more: [Setting up Roles](#))
- Translate your checklist to additional languages (Read more: [Checklist Translation](#))
- Use logic within you checklist, to show or hide certain questions (Read more: [Using Logic](#))
 - o *Logic enables you to dynamically transform your checklists content based on day, location and much more*
- Use triggers to create assignments, based on the user's response (Read more: [Using Triggers](#))
- Categorize your questions to easily group answers across multiple checklists (Read more: [Question Categories](#))