GeoTab Training: Adding Users
Best Practices

Step 1: Login to the GeoTab database and navigate to Administration → Users. Here you will see all of the users you have access to. You can click on any user to modify. To add a new user, click on the “Add” button at the top of the page.
**Step 2:** On the new user creation page, fill in the required information, highlighted below. Keep in mind there are 4 tabs: User, Driver, UI Settings and Map Settings.

### User Tab:

<table>
<thead>
<tr>
<th>USER INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>User (Email):</td>
</tr>
<tr>
<td>First name:</td>
</tr>
<tr>
<td>Last name:</td>
</tr>
</tbody>
</table>

**Authentication type:** Basic Authentication

- **Basic Authentication:** If you are unsure, use this option. We will handle your user accounts for you.

**Password:**

**Confirm password:**

**Force password change on next login:** Yes

**Security clearance:** Default user

**Data access:** Everything

**Additionally allow reporting by these groups:** Drivers

**Notes:**
- This will be the user ID the user uses to access the system. If the user does not have access to email, you can put a user ID here instead, just keep in mind the user will not be able to receive emailed reports.
- You can either choose a password for your users OR you can click "YES" next to force password change. Force password change will send a temporary password to the user and prompt them to change their password on the first login.
- For the security clearance, you want to choose the level of access appropriate for the user. Generally, users will either be "Administrators" or "View Only" users.
- This is where you will choose what data your user has access to. When you start to type a group name, a drop down list will show for you to choose from.
- This field is used to allow users to filter data or to group users together for reporting purposes. This will NOT give them additional data access. E.g. if you have reports that will go out to all drivers, you might have a group called "Drivers" you can add to your users to make it easier to schedule emailed reports.
**Driver Tab:**

This tab is necessary only if the user is also a driver. This tab will allow you to manually assign drivers to trips on the map. All fields on this page are optional.

### User New

**User** | **Driver** | **UI Settings** | **Map Settings**
--- | --- | --- | ---

#### USER AS A DRIVER

- **This user is a driver:**
  - [Yes]  
  - [No]
- **Prevent driver access to shared data:**
  - [Yes]  
  - [No]

#### NFC KEY

- **Serial No:**
  - [Field]

#### USB KEY

- **Serial No:**
  - [Field]
- **Enable trip data transfer:**
  - [On]  
  - [Off]

#### HOME GROUP

- **Same as data access:**
  - [Yes]  
  - [No]

#### DRIVER LICENSE

- **Driver license number:**
  - [Field]
- **License state/province:**
  - [Field]

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This question defaults to "No". Selecting "Yes" opens the rest of the form.

If "Yes", this protects you from showing the driver any other driver's information if it falls within their data scope from the previous page.

This is to designate whether or not the driver's home group is the same as their data scope from the previous page.
**UI Settings Tab:**

The UI Settings tab changes the user interface to be sure the data is showing in the correct format.

- **Distance measurement system:** Metric, US/Imperial
- **Fuel economy measurement:** L/100 km, km/l, MPG (US), MPG (Imp)
- **Date will have the format:** MM/dd/yy
- **Time will have the format:** h:mm:ss tt
- **Time zone:** America/New_York
- **Week starts on:** Sunday, Monday, Saturday
- **Language:** English

**UI SETTINGS**

- **Default page at start-up:** Map
- **News notifications:** On, Off
- **Feature preview:** On, Off

*For each of the fields, choose the correct unit of measure based on the user's location.*

*The default start-up page and the defaults for news notifications and feature previews should default to Map, No and No.*
Map Settings Tab:

Upon saving, an e-mail from noreply@geotab.com will be sent to the user (assuming they are set up by e-mail) with directions on how to log into the GeoTab system.

Each of the map values should default to Google Maps, Roadmap and Default.

Once all user settings are complete, click the save button in the upper left hand corner to finalize your user setup.