



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.

myGEOTAB Powered by GEOTAB

Groups filter All Support Arifleet 0 Notifications cishelpdesk@arifleet.com

Search name Add Sort by: Name Show historical Clearances View PDF

Users

Total items 67

12345 Company group	Nothing
aatkisson@arifleet.com Company group	View Only - ARI Account Rep
aratti@arifleet.com Ratti	Default user
arirep.geotab@arifleet.com Company group	View Only - ARI Account Rep
aritechlab@gmail.com ARI CIS	HOS DVIR User
averonis@arifleet.com Company group	Administrator
bjolicoeur@arifleet.com Company group	Nothing
bkauffman@arifleet.com Company group	Administrator





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:

User New ?

User Driver UI Settings Map Settings

USER INFORMATION

User (Email):

First name:

Last name:

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 No

Security clearance: Default user

Data access: Everything

Select groups...

Additionally allow reporting by these groups: Drivers

Select groups...

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

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

Prevent driver access to shared data:

Yes No

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.

NFC KEY

Serial No:

USB KEY

Serial No:

Enable trip data transfer:

On Off

HOME GROUP

Same as data access:

Yes No

This is to designate whether or not the driver's home group is the same as their datascope from the previous page.

DRIVER LICENSE

Driver license number:

License state/province:





UI Settings Tab:

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

User New ?

User Driver **UI Settings** Map Settings

REGIONAL SETTINGS

Distance measurement system:

Metric **US/Imperial**

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

Fuel economy measurement:

L/100 km km/L **MPG (US)** MPG (Imp)

Date will have the format:
09/13/17

MM/dd/yy ▼

Time will have the format:
11:54:36 am

h:mm:ss tt ▼

Time zone: **09/13/17 11:54:36 am**

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**

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





Map Settings Tab:

User New ?

User Driver UI Settings **Map Settings**

MAP SETTINGS

Default map type:

Default map view:

Default zone display:

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

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.

Save Cancel

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

User New ?

User Driver UI Settings **Map Settings**

MAP SETTINGS

Default map type:

Default map view:

Default zone display:

