Adding a <u>User</u> to GeoTab (Giving a user access to see vehicles in GeoTab)

- Groups filter All **MY**GEOTAB" æ Q Search for a user Q Search ΦF 🔓 Dashboard 🕼 Assets **Users & Drivers** 🖽 Мар Name Productivity +ž Compliance +00 Safety +Ŋ Maintenance +Ø Sustainability +ස People **Users & Drivers** Clearances Work Hours Holidays
- 1. In the lefthand menu on GeoTab, go to People and select Users and Drivers

2. Once you have opened the User List, select Add from the top of the screen

my geotab [∞]	Groups filter All groups selected			
Q Search @F	Q Search for a user Filter V	📄 🚊 Sort by: Username (email) 🗸 🖌 🕹 🕹	Report V	
Dashboard GJ Assets	Users 📮			
Productivity +	Name	Username (email)	User type	

3. The Add User page will open. Under <u>User Information</u>, enter the user's email address, first name, and last name. Click the dropdown menu next to <u>Groups</u>, select ARI Integration, Bill Code, then select the appropriate bill code(s) for the user.

*Do not make a selection for "Additionally allow reporting by these groups". Contact FMD to enable reporting for the user.

MY GEOTAB"			Groups filter	All groups selected		
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6	🙆 Dashboard 🛛 🖓 Assets					
🖽 Мар			User Driver UI Settings I	Map Settings Beta Features System Communications Support		
•			USER INFORMATION			
⊕	Productivity	+	Username (Email)			
ž	Compliance	+		Users without a valid email address will not receive emailed reports and		
00	Safety	+		exception notifications. They will also not be able to reset their own password, and will require help from an Administrator.		
B	Maintenance	+				
Ø	Sustainability	+	First name			
8	People	+	Last name			
			Designation			
đ	Messages					
\cap	Notifications		Employee number			
	Video Recordin	as	Phone number	I+I ↓ Ext.		
Ŀ	Reports	+	Groups	Select groups		
ę	Groups & Rules	+		AD94 ×		
			Data access	AD94 Modify		
/٨	Marketplace		Additionally allow reporting by these groups	Select groups v		
?	Support	+		None Selected		
¢	System	+	Selecting additional reporting groups will not allow the user to access additional assets apart from those in the Data Scope, but they will be able to use selected groups as a report filter.			

 On the same page, under <u>Authentication and Security</u>, select **YES** for "force password change on next login". Next to <u>Security Clearance</u>, click the dropdown menu and select "<u>AFC Admin – State of West Virginia</u>".

my	GEOTAB"		Groups filter	 All gr 	oups selected			
٩	Search	٥F	User Driver UI Sett	ngs Map S	Settings Beta Featu	res System Communications	Support	
â	Dashboard 😡	Assets			AD94		×	
	🖽 Мар		Data access		AD94		Modify	
⊕	Productivity	+	Additionally allow reportin these groups	ig by	Select groups	~		
1	Compliance	+			None Selected			
80 8	Safety	+	Selecting additional reporting groups will not allow the user to access additional assets apart from those in the Data Scope, but they will be able to use selected groups as a report filter.					
Ø	Sustainability	+	For example: We have a structure with Entire Organization > Canada > Ontario and Entire Organization > Departments > Delivery Trucks. The user may be limited to Data Scope 'Ontario', but also may want to run reports for 'Delivery Trucks' (limited by their Data Scope).					
De	People	+	AUTHENTICATION AND SEC	URITY				
þ	Messages		Force password change o login	n next	Yes	No		
Q	Notifications		Authentication type		An email will be sent to this user with a link to log in and change their password. This link will expire one hour from when it was sent.			
□a	Video Recordings				Denie Authenticatio			
-	Reports	+			Basic Authentication			
မွ	Groups & Rules	+			Basic Authentication: If you're unsure which authentication type to use, then select Basic Authentication.			
			Security clearance		AFC Admin - State	of West Virginia	~	
/٨	Marketplace		Comments					
?	Support	+						
⊚	System	+					li	

5. Click "save" at the top of the screen. An email will be sent to the user with a link to set their password (note, this link will expire one hour after it was sent). After the user has confirmed their GeoTab account, they will have access to see vehicles in GeoTab.

