

Quick Start Guide for SmartDrive & Geotab

This quick start guide will take you step-by-step for setting up your Geotab account. This guide only includes the basic steps of configuring your database. Your SmartDrive Customer Success Manager (CSM) or Strategic Engagement Manager (SEM) may help you with some of these steps.

Recommended Browser: As Geotab continues to innovate, many modern features of the web are integrated. To use all the advanced functionality of the application, a modern browser like the following is required:

- Modern version of Google Android™
- Modern version of Apple iOS
- Microsoft Internet Explorer® 10+
- The latest versions of Google Chrome™
- The latest versions of Mozilla® Firefox®
- Apple Safari® 6.0+

1. Go to your Geotab website

Your defined Geotab Admin received an email with your company specific database name and login credentials.

- Geotab website: <https://smartdrive.geotab.com>
- Click on the + and enter your unique database name

- **NOTE:** Your database name is in the Admin email or can be provided to you by your CSM or SEM.

2. Upon first log in, you are taken to the Product Guide

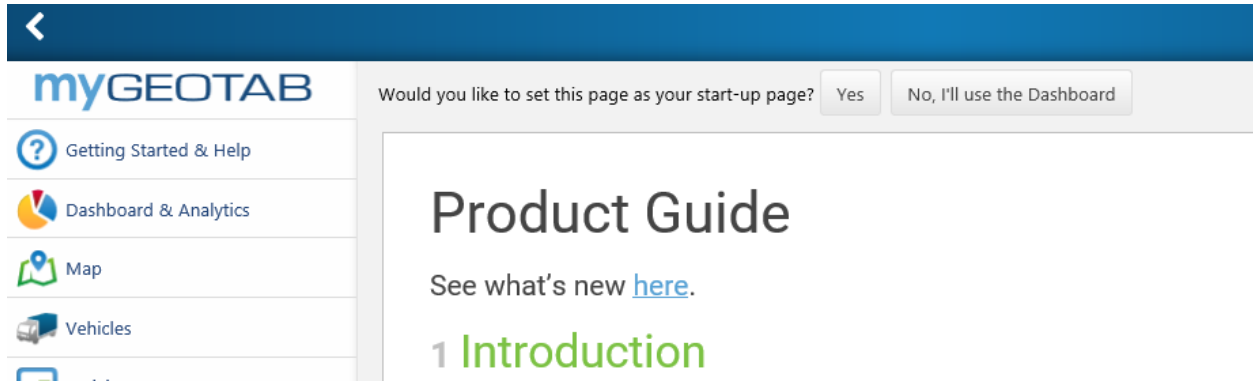
It is recommended that you click **No, I'll use the Dashboard**. This will ensure the dashboard is your start-up page.

The dashboard view can be customized, but it is recommended to wait until you have a better understanding of the system.

Would you like to set this page as your start-up page?

Yes

No, I'll use the Dashboard



Would you like to set this page as your start-up page? Yes No, I'll use the Dashboard

Product Guide

See what's new [here](#).

1 Introduction

Important: There are a few Geotab features that you cannot utilize with the SmartDrive program. Your SmartDrive team will assist with setting up your credentials so you are only utilizing those features available to you.

3. Turn on Reseller Access

This step will allow your SmartDrive program team to be able to assist you with setup activities.

1. Once logged in click on Administration—System.
2. Click on the **General** tab.
3. Select **Reseller** and change allow reseller access from Off to **On**.
4. Click **Save**

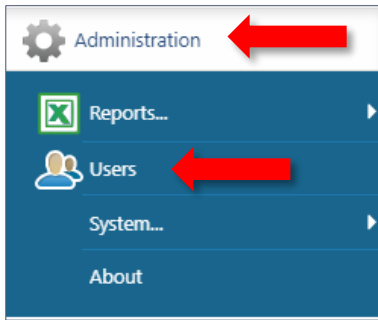
4. Creating Users with the Correct Sub-Clearances (Permissions)

At a minimum, you must create a “Customer Administrator” clearance with the correct sub-clearances hidden to ensure you are only seeing features that are enabled between SmartDrive and Geotab.

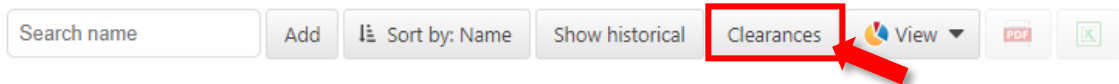
Recommended: We recommend that your SEM/CSM completes this for you.

You will need to create a customer administrator clearance at a minimum for each customer to turn off the items listed below that do not work between the systems.

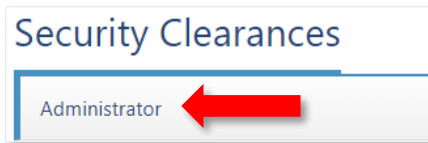
1. Click **Administration**
→ **Users**



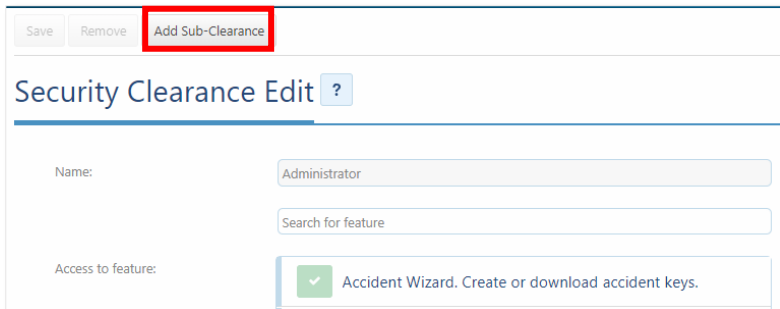
2. Click **Clearances**



3. Select the **Administrator** clearance that exists



4. Click on **Add Sub-Clearance**



5. Name it "Customer Administrator" and reference the chart below. Turn off "Access to Features" that are not utilized by SmartDrive.

Save Remove Add Sub-Clearance

Security Clearance Edit ?

















Parent: Administrator

Name:

Access to feature:

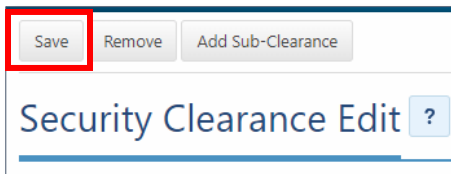
<input type="checkbox"/>	Accident Wizard. Create or download accident keys.
<input checked="" type="checkbox"/>	Administer Add-Ins
<input type="checkbox"/>	Administer certificates
<input type="checkbox"/>	Administer device's driver feedback settings

Disable the following features that currently do not work with SmartDrive and Geotab

 Accident Wizard. Create or download accident keys.
 Administer certificates
 Administer device's driver feedback settings
 Administer devices
 Administer devices (delete/unplug/replace)
 Administer Garmin status groups
 Administer radio downloaders
 Administer the device's advanced settings
 Configure services (enable/disable service, configure ...
 Install history report
 Read key information
 Request device location via Iridium satellite network
 Restore key backup
 Send external relay instruction
 View About page
 View device reports

	View engine failure modes
	View engine management report
	View engine measurement related features
	View engine types
	View engine units of measurement
	View flash codes
	View GO TALK features

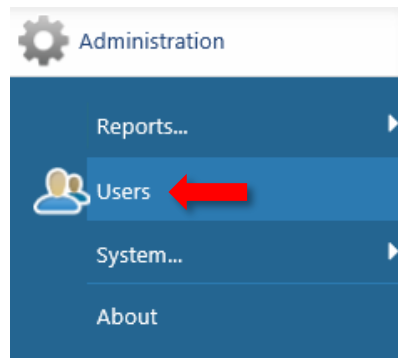
6. Click **Save** at the top of the page



5. Update Administrator's security clearances to the Customer Administrator

Updating your Administrator's security clearances to the "Customer Administrator" will ensure you are disabling features that are not compatible between SmartDrive and Geotab.

1. Click on **Administrator** → **Users**



2. Select the person(s) that has Administrator access.
3. Click on the Security Clearance drop-down and select **Customer Administrator**
4. Click **Save**

Save Remove Cancel

User Edit ?

User Driver UI Settings Map Settings HOS Settings

USER INFORMATION

User (Email):

First name:

Last name:

Authentication type:

MyAdmin:
You must first be registered on the MyAdmin site before the account can be Administrator

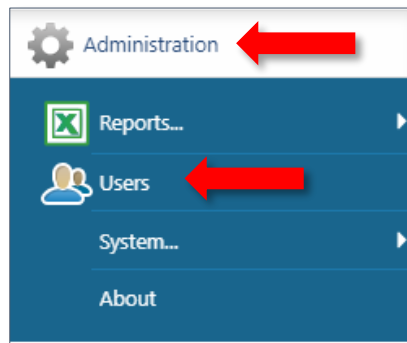
Security clearance:

Default user
Drive App user
Driver App User

6. Modify the Drive App User Clearances

The Drive App user clearance is a default user. You will need to go into this clearance setting and disable the following two features: Read key information and View device reports

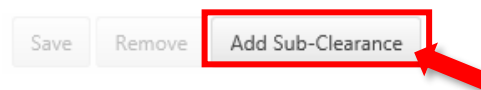
1. Click **Administration** → **Users**



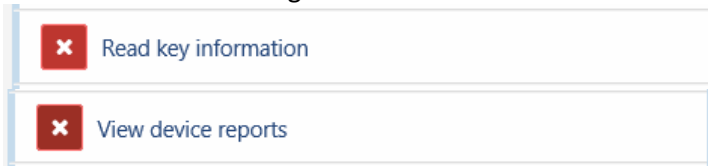
2. Click **Clearances**



3. Click on **Drive App user**.
4. Click on **Add Sub-Clearance**. This will give you the ability to disable items under "Access to features":



5. Disable the following two items:



7. Verify other clearances (permissions)

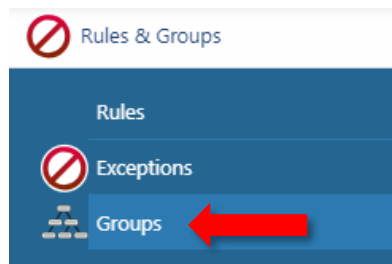
Determine if there are other clearances that you may need and create them under the customer Administrator Sub-Clearance.

8. Creating Groups

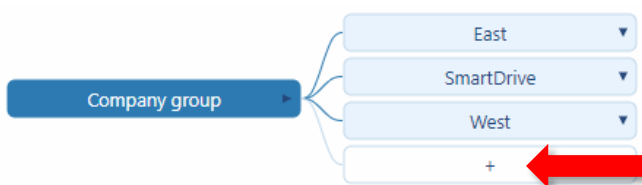
If your company operates by terminals or multiple sites, then you will probably need to create Groups. Groups allow users to only look at the groups they care about. It also groups drivers by who manages them.

Creating a group:

1. Click on Rules & Groups
2. Click on Groups



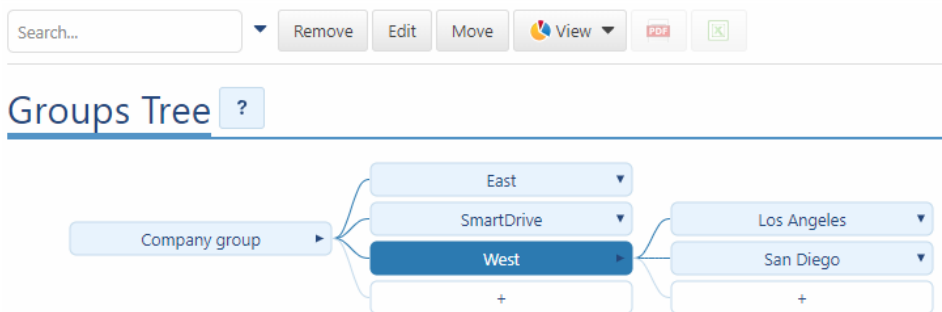
3. Click on the + next to the Company name.



- Enter your group name (i.e. region/site/terminal)
Think of it as the parent/child relationship so everyone is under the parent (company).
Optional:
 - Description
 - Color: The color at bottom is only to color code the group diagram if you would like.
- Click **Save** at the top

- To create more groups, continue to click the + and follow the above steps.

Recommended: We recommend you create groups based on your existing organizational hierarchy/reporting and that you mirror this hierarchy within your SmartDrive program.



9. Creating Users

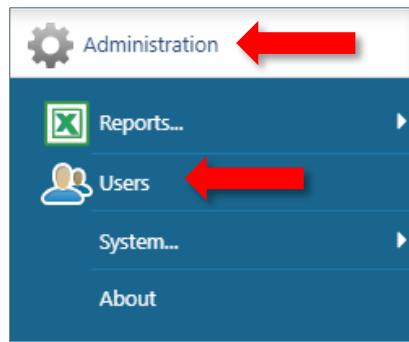
Users can be added one-by-one or can be bulk imported.

- Watch a “how to add users” video [here](#)

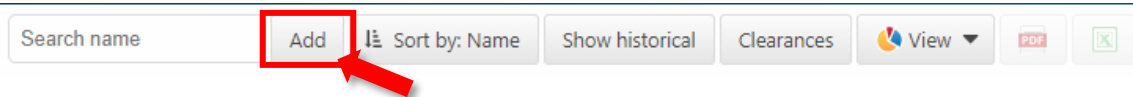
All steps to add users can be found here:

https://docs.google.com/presentation/d/1UYg_NxxHY4LtvBvUBGZ7G6tjBCyN3cXzT-f22YZ5-dk/edit#slide=id.g3e4962d390_1_0

1. Click **Administration** → **Users**



2. Click **Add**



3. Complete the following information:

Save Cancel

User New ?

User Driver UI Settings Map Settings HOS Settings

USER INFORMATION

User (Email): julie.stevens@smartdrive.net

First name: Julie

Last name: Stevens

Authentication type: Basic Authentication

Force password change on next login: Yes No

Security clearance: Customer Administrator

Data access: West

Additionally allow reporting by these groups: None Selected

Designation:

Employee number:

Enter the users email address (username), first and last name

Leave Basic Authentication set as is

Set to Yes

Click the drop-down arrow to select the group the users should be able to see data for

Designation and Employee number are optional.

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.

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).

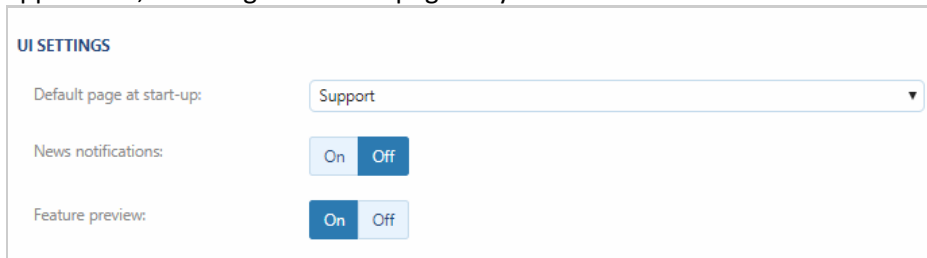
Click **Save** to add the user.

Optional Settings: **UI Settings** and **Map Settings**



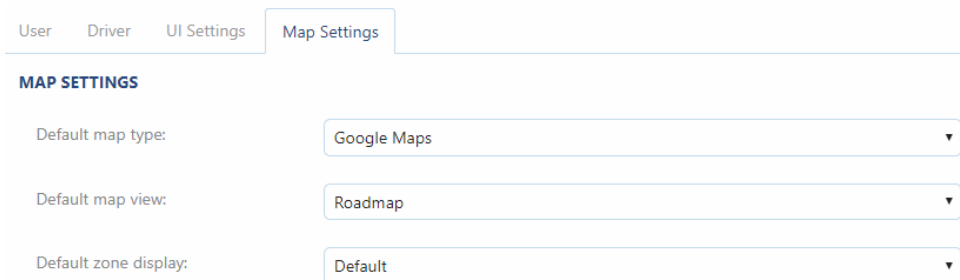
UI Settings

This is where you change measurements (i.e. distance and fuel economy measurement) and time zone and formats. For a user, you can change which page is initially shown when you log in to the application by selecting from the **Default page at start-up** list, as shown below. Newly created users will be shown the **Getting Started** page, and after becoming accustomed to using the application, selecting a different page may be more beneficial to more advanced users.



Map Settings

This allows you to change what you view when utilizing maps:

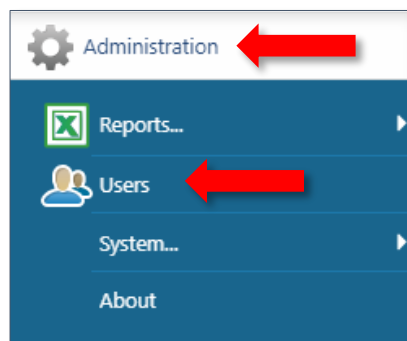


10. Creating Drivers

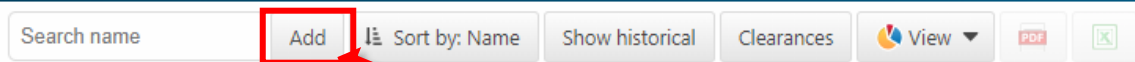
Drivers can be added one at a time or bulk imported. Users can also be imported via the SDK, see [here](#).

Take the following steps for adding a single driver:

4. Click **Administration** → **Users**



5. Click **Add**



6. Complete the following information for your driver:

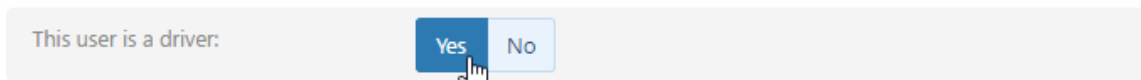
- User (Email) - required
- First name - required
- Last name - optional
- Authentication type - choose Basic Authentication
- Password - choose a password that fulfills your password policy
- 'Force password change on next login'
 - If set to yes, this emails the user a link to log in and create their own password. This only works for users whose username is a valid email address
 - If set to no, manually enter a password for that user. Choose this option if the username is not a valid email address.
- Security Clearance - choose a clearance from the dropdown (see [here](#) for details on security)
- Data Access - if the user should only see data from a certain group(s) choose them here by searching in the text box and clicking groups that apply
- Additionally, allow reporting by these groups:
 - Allows users to receive reports from other groups other than their assigned groups
- Designation, Employee number, Comments - all optional fields to enter extra data if needed.



7. Click the Driver tab

- Used to enable driver features for use in HOS, DVIR, Driver ID, and Messaging

8. Toggle the 'This user is a driver' to Yes. This will open additional options below



- Prevent driver access to shared data: Toggle this to **Yes** to ensure that the driver will only see data entered under the driver's name (driver will only see HOS and DVIR data related to them).
- NFC Key: If using IOX-NFC Reader, enter the NFC sticker or tag serial number
- USB Key: This section is for legacy GO4 devices only
- Home Group: Add additional groups to have access to
- Driver license number: Enter the license of the driver
- License state/province: Enter the license issuing location

9. After entering a Driver on the Driver tab, you may choose to enable further settings on further tabs:

- UI Settings - defaults to match the user that created this new user and can be changed

- Map Settings - defaults to match the user that created this new user and can be changed

10. Click the **Save** button when done
11. **Optional:** If driver is running HOS

Complete the following fields below.

- **Note:** You must complete Driver's License Number and Driver's License State.

User
Driver
UI Settings
HOS Settings

HOURS OF SERVICE SETTINGS

Ruleset:

Home terminal:

Home terminal address:

Carrier number:

Yard move allowed: On Off

Personal conveyance allowed: On Off

Authority name:

Authority address:

Finally, you have the ability to **mass edit users**, click [here](#) to learn how.

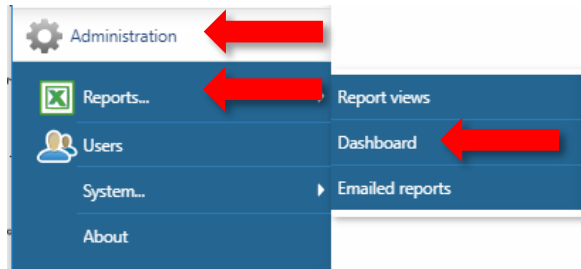
11. Vehicles – do NOT use

Vehicles will be automatically added from the SmartDrive Database. Do **NOT** change vehicle settings.

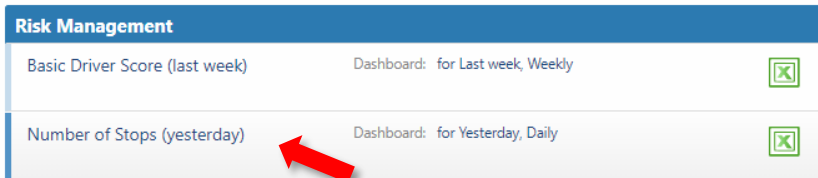
12. Customizing your Dashboard

SmartDrive has added typical dashboards that you may want to utilize. To add additional dashboards or view reports:

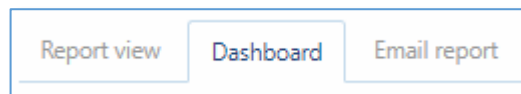
1. Click **Administration** → **Reports...** → **Dashboard**



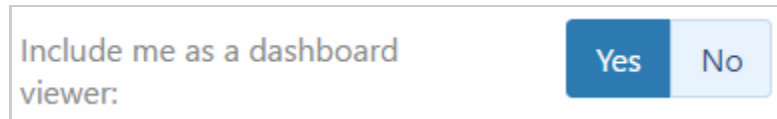
2. Click on the report/dashboard that you want to add



3. Ensure you are on the Dashboard tab.
Note: You have the ability to view the report or schedule the report to be emailed to you or to specific groups.



4. Change "Include me as a dashboard viewer" to **Yes**



13. Resources and Who to Contact

This guide only includes the basics of getting started. A Geotab representative will be scheduling training on using the platform. Most training resources are located here: <https://www.smartdrive.net/geotab-customer-resources/>

Issue	Contact
If you have questions about utilizing the program and/or features within the Geotab database.	Contact your Customer Success Manager (CSM) or "SmartDrive Geotab" Tech Support: (888) 428-8418
If you are having issues with the Geotab database with getting data or other technical problems.	SmartDrive Customer Support – 24/7 US Toll-free: (866) 933-9930 customer.service@smartdrive.net
You are having issues with your SmartRecorder	SmartDrive Customer Support – 24/7 US Toll-free: (866) 933-9930 customer.service@smartdrive.net
You need to order parts or have someone dispatched to install units	Global Parts and Service – 24/7 US Toll-free: (866) 933-9930 (Option 3) parts-service@smartdrive.net