

Keyless Lite: Quick Start Guide



GEOTAB®

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*** NOTE: Do you have a use case/feature request for the Keyless Lite Solution?**

The Geotab Product Management Team wants to hear from you! We work hard to improve our products, and your feedback is important to us. Submit your feedback to [Geotab's Feedback Hub](#).

The Keyless Lite mobile application enables drivers and fleet team members to access your fleet's shared vehicles – locate, unlock and lock – from a simple mobile phone application using digital keys, in locations with or without data connectivity. It automatically assigns Drivers, enabling you to know who has or had access to which shared vehicle, in MyGeotab features and reporting. Keyless Lite is an Add-in for Geotab Drive, Geotab's mobile application. It is an optimal solution when no pre-reservations are required: drivers unlock vehicles and go.

*** NOTE: What about NFC fob access for "on demand" access?** NFC fob access is not yet easily supported for "on demand" access without a pre-reservation. As we evolve our solution, we will assess support on our roadmap. If support for your fleet is important to experience the full benefits of the solution, submit your feedback to [Geotab's Feedback Hub](#).

Setup

*** NOTE:** Visit [Keyless Solution Partner Guide \[PUB\]](#) for complete customer setup information beyond Keyless Lite.

Initial setup for Keyless Lite is a multi-step process that requires action from the Partner and the Customer.

Install Keyless Lite

Install Keyless Lite (Geotab Drive Add-in): There are two ways to install.

Marketplace	Install the Keyless Lite Add-In directly from the Geotab Marketplace: https://marketplace.geotab.com/solutions/keyless-lite/
Manual installation using a config file	Consult How to install/add an add-in manually into a MyGeotab database and use the following config file text: <pre>{ "url": "https://app.geotab.com/addins/geotab/keylessLiteDrive/manifest.json" }</pre>

Customer Keyless database setup

The MyGeotab database must be configured in order for vehicles to properly populate inside the Keyless Lite mobile application and for users to be able to access them.

Create a new Security Sub-Clearance for Geotab Drive without ELD Compliance

Geotab Drive by default has features visible for US ELD (Electronic Logging Device) compliance. If you are not using these features, to reduce your Drivers' confusion, remove ELD features from view, and only have Keyless Lite features visible.

To do so, create a new security sub-clearance of **Drive App User** (recommended for most of your Drivers) or **Administrator** (if any in the Administrator role will also be accessing vehicles via Keyless Lite), then in a future step, assign your Drivers this sub-clearance.

How to create a new Security Sub-Clearance: Follow [How to Create a Security Sub-Clearance](#).

- For starting point built-in clearances from which to create your sub-clearance, use **Drive App User** (recommended for most cases) or **Administrator** (if any users in the Administrator role will also be accessing vehicles via Keyless Lite).

*** NOTE:** Keyless Monitor requires users to have Security clearance 'Administrator' and currently users with a Sub-Clearance of 'Administrator' will not be permitted. If you are an Administrator, we recommend:

- Keep your current account for MyGeotab use, including Keyless Monitor.
 - Create a new account for your use as a Driver (in the Geotab Drive app) with a sub-clearance of Administrator (or Drive App User) optimized for Keyless Lite without ELD features, as outlined below.
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- Under **Access to feature**, disable the following:
 - Administer Asset Inspection Logs
 - Administer HOS Logs
 - Administer shipments
 - Administer untracked assets
 - Mark Asset Inspection logs as certified
 - Mark Asset Inspection logs as repaired
 - Perform Asset Inspections
 - Send messages
 - Send messages on behalf of another user
 - View Asset Inspection logs
 - View HOS Logs
 - View messages

- View shipments
- View route
- View untracked assets

When you add Drivers as MyGeotab Users, which is a step below, ensure that all Drivers are assigned your new sub-clearance.

Create Shared Vehicle Groups and Assign Shared Vehicles

Keyless Lite Drivers are able to locate, lock and unlock all vehicles assigned to a Group, allowing you to allow and restrict access based on MyGeotab groups.

To create new vehicle groups to assigned shared vehicles, see [How to create a group](#).

To assign vehicles to groups, see [How to put a vehicle in a Group](#).

*** NOTE:** While you are assigning vehicles to groups, you may want to follow steps in the [Support Driver Vehicle Identification: Add Vehicle Description Information](#) section to reduce future steps.

If you are new to Groups and have a more complex fleet, see [Pro tips for using MyGeotab groups and sub-groups](#).

When you add Drivers as MyGeotab Users, which is a step below, ensure that all Drivers are assigned Data access to the appropriate created Group(s).

Support Driver Vehicle Identification: Add Vehicle Description Information

Each vehicle inside the MyGeotab database that is accessed by Keyless Lite should have the following details populated with clarity for vehicle identification, which will appear in Keyless Lite to support Drivers identify a vehicle. To add/edit this information, see [How to edit a vehicle's information in MyGeotab](#).

- **Name/Description:** In Keyless Lite, this will be how vehicles are found from the main screen.
- **License plate:** This further helps uniquely identify the vehicle to the Driver, and will appear on a vehicle's details and actions screen.
- **Comments:** Add the physical description of the vehicle (for example, White Kia Forte).
 - * NOTE:** Model, which is the Make and Model decoded from the VIN, is not included. Complete this information in Comments to ease vehicle identification.

Add Drivers as MyGeotab Users

In order to start using the Keyless Lite app, Drivers must be added as MyGeotab database Users.

Follow [How to add a user in MyGeotab](#) to add Drivers as MyGeotab users.

As you add new Users, follow these additional steps:

1. Set **Security clearance** to be a new sub-clearance you created above, or alternative.
2. Set **Data access** to the applicable group.
 - * NOTE:** This will impact what vehicles the user can locate, unlock and lock with in the Keyless Lite mobile app.

3. Navigate to the **Driver** tab and toggle **This user is a driver** to **Yes**. If this is not set to **Yes**, then Driver assignment to vehicles is not enabled as outlined in [How to view which Driver has / had which Shared Vehicle](#).
4. **To set the Geotab Drive and Keyless Lite language:** Navigate to UI Settings and set the appropriate **Language** value. Keyless Lite is available in English, Spanish, German, French (France), Dutch, and Italian.

Ready for Drivers: download the application and start using Keyless Lite

Once the above steps are completed, we're ready for Drivers.

Drivers can follow this simple explanation hand-out: [Getting started with Keyless Lite](#).

This video also summarizes how Keyless Lite works: [How to use the Keyless Lite Add-In](#).

Important Notes:

- **Offline Unlock, Lock and Locate:** Ahead of accessing a vehicle in a location without a data connection, a virtual key must be downloaded and available in Lite. To do that, ensure you **complete up to step 4** in [Get Started with Keyless Lite](#).
- Smartphone Location is used to identify nearby vehicles. It is recommended that Location is made available to the Geotab Drive application, to help Drivers identify nearby vehicles.
- Bluetooth is always used to Locate, Unlock and Lock vehicles. If a Driver is not within Bluetooth proximity, which typically means the same lot or area of a lot, then the Driver will not be able to access the vehicle. For a vehicle that is out of Bluetooth range, a symbol indicating an incomplete connection will appear on the vehicle information & command page, and options to Locate, Unlock and Lock are not available.
- Keyless Lite responds to a 'Locate' request, potentially inconsistently by vehicle type. Typically, this may involve flashing lights and/or honking.

How to view which Driver has / had which Shared Vehicle

Keyless Lite will automatically assign a Driver to a vehicle when they unlock it, and stop the assignment when they lock it.

* NOTE:

- Data connectivity required for driver assignment: Drivers must have data connectivity when unlocking or locking the vehicle to be assigned to, or assignment removed from, the vehicle.
- In [Add Drivers as MyGeotab Users](#), ensure to navigate to the Driver tab and toggle "This user is a driver" to Yes. If not, Driver assignment for this User will not be supported.

See which Driver has which shared vehicle (currently)

* NOTE: If [Personal Mode](#) is enabled, the vehicle will not appear actively on the Map as outlined below.

1. Open the **Map**.

2. Zoom in to your location and or filter vehicles by your shared vehicle Group(s).
3. The Driver who last unlocked (and not yet locked) a vehicle will appear in the vehicle listing, as well as within brackets after the vehicle's name on the Map.

See historic shared vehicle access

1. Click on **Map** from the main menu.
2. Click **Trips History**.
3. Click **Options**.
4. Select the desired **Date Period** to run the report.
5. Click **Apply Changes**.
6. Click **Report** and select **Advanced** to download the Advanced Trips Report.

The Driver name is displayed in Column G of the downloaded Advanced Trips Report.