



Geotab Functions and Associated Responsibilities

Because some terms are often repeated, for the purposes of this document, please note:

- “Geotab” refers to the company, its agents and its products in totality
- “MyGeotab” refers specifically to the web-application used for viewing telematics data
- “Geotab Drive” refers to the mobile application used by some agencies for driver/vehicle management
- “GO9 device” refers to the physical device installed in vehicles

As we move toward every State Fleet vehicle having an installed Geotab telematics device, it is important to understand which responsibility lies with State Fleet Management (SFM) and which lies with the [Primary Fleet Coordinator](#)* for each agency. The following charts identify these responsibilities, by general category:

Geotab Access	Agency Responsibility	SFM Responsibility
Creating Geotab User Account for Primary Fleet Coordinator		Y
Managing Existing Primary Fleet Coordinator Accounts (password resets, access level changes, and decommissioning user accounts)		Y
Creating Geotab User Accounts for agency personnel (other than the Primary Fleet Coordinator)	Y	
Managing Existing Agency Users, other than the Primary Fleet Coordinator (password resets, access level changes, and decommissioning user accounts) - review the Geotab Role Matrix for a detailed understanding of user permissions	Y	

Geotab Reports	Agency Responsibility	SFM Responsibility
Reviewing MyGeotab reports and data to identify opportunities to increase vehicle efficiency	Y	
Creating customized reports that can be utilized fleet-wide (SFM to share templates)		Y
Creating customized reports specific to agency needs (SFM, Geotab & Sawatch will provide assistance as needed)	Y	
Importing customized templates and assigning them to the appropriate groups (Units) in MyGeotab	Y	
Setting up Report Distribution to agency-identified recipients	Y	



Odometer Review	Agency Responsibility	SFM Responsibility
Reviewing uploaded odometer readings following the State Fleet Management process to identify discrepancies	Y	
Researching devices with discrepancies. Using reports in MyGeotab and troubleshooting the device if needed, without removing it	Y	
Requesting support from Sawatch Labs/Geotab if the specific issue is not identified (escalate if needed through SFM)	Y	
The agency can request an odometer offset by collecting the current odometer reading, the date and time the reading was taken, and then following the Odometer Upload and Offset Process using the Odometer Upload Review sheet	Y	
Tracking and researching odometer offset requests and completing qualifying odometer offset requests		Y

Device Issues/Troubleshooting	Agency Responsibility	SFM Responsibility
Reviewing reports in MyGeotab to identify devices with communication issues	Y	
Requesting support from Sawatch Labs/Geotab if the specific issue is not identified (escalate if needed through SFM)	Y	
Agencies that employ an Authorized Geotab Installer will perform Geotab-provided troubleshooting steps (including the diagnostic flow chart) - please reach out to SFM before physically removing a device to prevent compromising the data	Y	
Agencies not employing an Authorized Geotab Installer may refer to the Geotab-provided troubleshooting steps but should only perform steps that do not require the physical removal or unplugging of the G09 device - please reach out to SFM if you have been asked to perform these steps	Y	



Device Installations	Agency Responsibility	SFM Responsibility
First time installing telematics? Please refer to the Geotab Installation Process for more information.		
Identifying vehicles for a planned installation of a telematics device Collaboration with the agency may be necessary		Y
Identifying vehicles that need to be ELD Compliant or that will need additional equipment installed such as Key Readers, Tablet Mounts, IOX Satellite capabilities, etc.	Y	
Complete Installation Details including an OnSite Coordinator, proposed installation address, and shipping contact and address on the provided shared Google sheet (link will be provided).	Y	
Coordinating installation location(s) with Sawatch Labs and Geotab Installation team; once shipment notification has been received, date(s) and time(s) will be determined Document all security and safety protocols. <i>The agency is responsible for notifying Geotab of changes to scheduled installations. A \$100 fee per vehicle for a No-Show or Late Cancellation (48-Business hours) may apply.</i>	Y	
Receiving and performing an inventory of the GO9 telematics devices shipped from Geotab and the State of Colorado Telematics Decal/Sticker shipped from SFM Bringing all equipment to the installation site(s) and apply the sticker to vehicles after installation of the device is complete	Y	

Device Removal	Agency Responsibility	SFM Responsibility
The GO9 Device is not to be removed from a vehicle without permission from SFM		Y
All telematics equipment, <i>other than the Geotab GO9 device</i> , are to be removed from a vehicle before it is turned in to SFM. The Geotab GO9 device is to remain intact.	Y	
Discontinuing service to the device upon sale of the vehicle, or as needed		Y
Reassigning turned-in vehicles to the correct agency/group in the Geotab database		Y



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*SFM recommends that each Primary Fleet Coordinator work with their management team to delegate an appropriate backup to perform these functions in Geotab.

Please visit our website (<https://dca.colorado.gov/state-fleet-management>) where you can find links to our Help Desk and Knowledge Base for further information and training materials to assist you with system functionality.

Please contact the Fleet Application Support & Training team (FAST) if you have any questions:
dpa_sfmtraining_support@state.co.us