

443-808-2719 - Weekdays 9am to 5pm U.S. Eastern Time

CUSTOMER GUIDE: Installation

Welcome

Thank you for choosing to install FLEETMATE... cost-effective fleet maintenance management software. FLEETMATE will help you:

- Comply with regulatory and safety requirements.
- Minimize repair costs due to unexpected breakdowns.
- Extend the useful life of your fleet assets.
- Maximize asset availability by helping to keep your fleet assets properly maintained and running right.
- Improve Operational Efficiency and reduce your use of paper.

Requirements and Compatibility

FLEETMATE is compatible with all versions of Windows operating systems from Windows 7 SP-1 forward. Windows 10 or 11 is recommended.

Your computer should offer the following *minimum* features:

- Windows compatible PC with a CPU running @ 1.5 GHz
- 4 Gb of RAM (Random Access Memory)
- 500 Mb Free Disk Space
- Laser or Ink Jet Printer
- 1280 x 720 Display Resolution Standard 4:3 or 16:9 Aspect Ratio
- If using FLEETMATE in a networked environment, your computer will need:
 - o 1 Gbps (or faster) Network Interface Card
 - Network File Server

Security and Confidential Information

FLEETMATE does not collect, store, use, or transmit banking information or any other sensitive financial information. In terms of private information, such as your email password, FLEETMATE login credentials, etc., this type of information is concealed in a way to prevent discovery by others.



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Operating System Permissions

Your Windows user account will need to offer adequate local permissions during installation. It is recommended that *Local Admin Permission* be granted.

The other approach will be to login under your Windows user account, and run the fmsetup.exe installer as Administrator. You may need assistance from your IT support staff to enter the Administrator password so that the installation may be completed successfully.



Data Backups are Essential!

With FLEETMATE, you can choose to use either the Standard Microsoft JET database (*included*) for data storage, or opt for a Microsoft SQL Server database.

Whether using a JET database or a SQL Server database, maintaining data backups is essential. You may also want to consider storing your data backups off-site to facilitate disaster recovery. Make sure you can get to your backups if/when they are needed.

Consult with your IT department to confirm that effective, tested business continuity protocols are in-place. Whether fire, accident, natural disaster, or a malicious virus/ransom-ware attack, you must have *clean*, reliable data available for recovery.

Standalone Single-User Installation – Microsoft JET

Each time you exit FLEETMATE, by default, it will create a date/time-stamped copy of your current database. It will store these copies into a drive/folder of your choice. Use the **General** tab under **Options** | **Preferences**... to specify an external storage device as the Backup Path for your backup copies.

Network Multi-User Environment – Microsoft JET

When you choose to store your JET database file on a file server, make certain that the file server has been configured to make daily backups of your data files, including your FLEETMATE JET database file.

Network Multi-User Environment – Microsoft SQL Server

When you choose to use SQL Server for data storage, make certain that SQL Server has been configured to make daily backups of your SQL Server database.



Overview

The FLEETMATE software product is installed using an installer program. This document will cover the installation process beginning at the point you download the installer from the FLEETMATE Website.

Once you install FLEETMATE on your PC, we also recommend that you take a few minutes to review the other Customer Guides on the FLEETMATE Website. Each is focused on a specific topic, and will help you get started with FLEETMATE.

The FLEETMATE Website also features our **FLEETMATE@WORK Instructional Video Lessons**. This collection of videos will cover many of the features offered by FLEETMATE, and will actually demonstrate how they work. These videos can be very beneficial by helping you grasp the basics as you begin to use FLEETMATE.

If at any time you need help installing or using FLEETMATE, send your questions to support@fleetmate.com for assistance.

Updating Your Existing FLEETMATE Software?

If you already have FLEETMATE installed and need help updating your FLEETMATE software to the latest release, please proceed directly to page 15 in this document.

If you plan to store your FLEETMATE data in a Microsoft SQL Server 2012 (*or later*) database, first install FLEETMATE. Next, turn to **page 16** in this document for additional information on creating your FLEETMATE database on SQL Server.

This section also provides information on migrating your existing FLEETMATE data from a JET database to a SQL Server database if applicable.



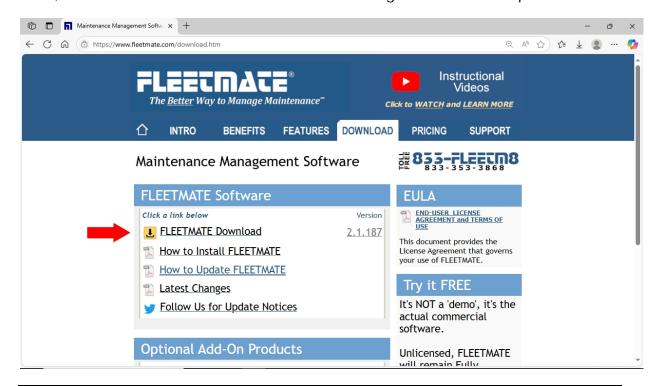
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Download

The first step in the installation process is to download FLEETMATE from the FLEETMATE Website. To do this, click the **Download** button to navigate to the Download page as pictured below.

Next, click the **FLEETMATE Download** link to begin the download process.



FLEETMATE Download Page on the Web

Once you click the download link, your browser may ask if you want to Run the file, Open the file, Save the file, or Cancel. All browsers are slightly different in this regard. Use the option that will *Execute* or *Open* the file so that the installation can begin. This is the guickest and easiest approach.

If you are **updating** an existing FLEETMATE installation, turn to page 15 in this document for instructions.



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Running the Installer – Initial Installation

The installer will open and display a Welcome dialog. Click Next >
The End-User License Agreement will be displayed. If you accept the terms of the Agreement, click I Accept to continue.
If you do not accept the terms of the Agreement, click I Do Not Accept then click Cancel to cancel the installation.
After accepting the End-User License Agreement, you will see a Choose Destination Location dialog. The default location will be $C:\Pr$ Files $(x86)\$ This is the recommended location. Click Next >
You will now be asked to choose a Program Manager Group to store the FLEETMATE shortcuts that will be created. The default and recommended Program Manager Group is FLEETMATE. Click Next >
You are now ready to begin the actual installation process. Click Next >
Once the installation process is complete, you will see an Installation Complete dialog, indicating that the process has been completed. Click Firsh
FLEETMATE is now installed on your PC.
As a default, your FLEETMATE database file will be located on your PC in the C:\Users\Public\FLEETMATE folder on your local disk.



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Starting FLEETMATE



A FLEETMATE shortcut was installed on your Windows® desktop during the installation process. This enables you to start FLEETMATE directly from this shortcut.

If you do not want the FLEETMATE shortcut on your desktop, you may delete it and use **Start** | **All Programs** | **FLEETMATE** program group to start FLEETMATE. Simply click the FLEETMATE shortcut.

Network Administrator Notes:

When using FLEETMATE via remote access (e.g., Windows Remote Desktop Services), make certain that you run the installer while your server is in <u>install</u> mode.

Refer to page 12 in this document for additional information concerning Virtual Desktop Infrastructure installations.



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FLEETMATE Startup

When FLEETMATE is started it will display an initialization screen with a progress bar, indicating that the system is starting. This will take a few moments.

If any vehicles (or other assets) in your fleet require your attention, a Reminders window will then appear. Once you close the Reminders window, you will see the FLEETMATE main window. You may now begin using the system to perform whatever tasks are necessary.

We have provided sample data so that you can navigate through the system and visit the various windows and features. You can certainly delete the sample data and/or enter your own information as you use FLEETMATE.

If you are evaluating FLEETMATE, any data that you enter during your 30-day trial period is yours to keep. It will remain in your database. Even if your 30-day 'trial' period expires, your data still remains in-place.

If your 30-day trial period expires before you have had adequate time to fully evaluate FLEETMATE, send an email to support@fleetmate.com to request a 30-day trial extension. We'll be glad to assist you.

Close FLEETMATE when it is Not in Use



Be sure to close FLEETMATE at the end of each business day. This will avoid the possibility of unauthorized access to your FLEETMATE data.



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FLEETMATE Network Installation - Overview

If you need multiple users to access shared fleet information, you'll need to install FLEETMATE on each PC, or on a Windows Remote Desktop Session Host, using the fmsetup.exe installation program. Your FLEETMATE JET database can be located on a network file server in a *shared* folder of your choice.

FLEETMATE will require a 100 Mbps (faster is better) *hardwired* network connection from each PC, to the file server where your JET database is stored. For use at remote offices, we recommend using a product such as Windows Remote Desktop Services for remote connectivity. This will avoid any potential network bandwidth issues.

A wireless Wi-Fi (e.g., 802.11x) network connection to your JET database file is **not** supported. Use a hardwired network connection, or run FLEETMATE via remote desktop.

Microsoft OneDrive <u>cannot</u> be used to store your FLEETMATE JET database file.

You will need to create a shared folder on a file server that will be used to store your FLEETMATE JET database file. We recommend that you name the folder "FLEETMATE", so that it is easily identified. You can then copy your current FLEETMATE database file from the C:\Users\Public\FLEETMATE folder on your PC disk, to the folder that you created on your file server

User Account Permissions (*JET Only*)

Each user account defined in your Windows operating system must grant *Full Control* to the shared folder on your file server where your JET database is stored. You may need to contact your IT personnel for assistance.

Mapped Drive (JET Only)

We recommend that you consider setting up a *mapped drive* to the shared database folder so that each end-user can easily identify and access the shared database file on your file server. Use the same mapped drive letter, so that all network users can easily recognize it.



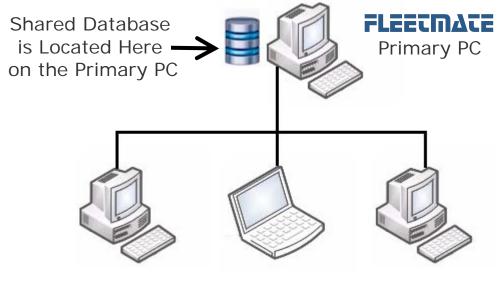
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FLEETMATE Peer to Peer Network Installation

FLEETMATE with its JET database is very easy to install and use within a hard-wired peer-to-peer networked environment.

Use Windows networking to share the folder (e.g., C:\Users\Public\FLEETMATE) that contains your database on your **Primary PC**. All other users will access the *shared* database file located on the **Primary PC** as pictured below.



FLEETMATE

Each of these Users will access the Shared database on the Primary PC.

Basic Peer to Peer Network Configuration

Opening your Database on Your Primary PC

Each user will need to use the **File** | **Database** | **Open**... menu function *one time* to open the database on your primary PC.

Always use the **Microsoft Jet 4.0 OLEDB Provider** for a JET database.

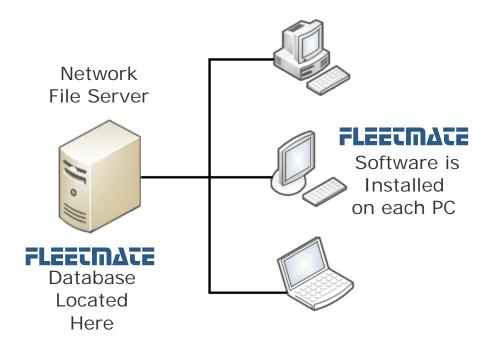


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FLEETMATE Local Area Network (LAN) Installation

FLEETMATE with its JET database is very easy to install and use within a local area network environment. It really is as simple as the diagram below illustrates.



Basic Local Area Network Configuration

Opening your Database on Your File Server

Each user will need to use the **File** | **Database** | **Open**... menu function *one time* to open the database on your file server.

Always use the **Microsoft Jet 4.0 OLEDB Provider** for a JET database.

FLEETMATE will *remember* the location of the last-used database between sessions. This means that you will not need to re-open the database manually each time you start the program. It is automatic.



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Virtual Desktop Infrastructure (VDI) Overview

VDI (Virtual Desktop Infrastructure), often referred to as *remote desktop*, is essentially a user's desktop environment running on a server in your datacenter. It is not their actual desktop on their PC... thus the term *virtual*.

A Remote Desktop Session Host (RDSH) is the machine that will host the virtual desktop that includes the FLEETMATE client software. So FLEETMATE will actually execute on the server, not the end-user's PC. Once again, FLEETMATE is <u>not</u> installed on the end-user's PC.

In a VDI environment, the PC will function as a terminal, sending mouse and keyboard activity from the end-user's PC to the server, and receiving screens and responses from the server session. There will be no actual data traffic between the FLEETMATE database and the end-user's PC. Rather, data traffic will be confined to high speed network connections in your main datacenter.

This provides a responsive user experience, with very little concern over WAN (wide area network) bandwidth. The only thing required to use FLEETMATE in this way from any location in the world, is an Internet connection.

VDI with a Single FLEETMATE Database

Whether using a standard JET database or a SQL Server database, if you plan to use one consolidated FLEETMATE database for all fleet assets, there is nothing special that needs to be done, other than setting up your VDI environment. Refer to your IT staff for additional information and assistance with the RDSH setup.

VDI with Multiple FLEETMATE Databases

If you plan to use multiple FLEETMATE databases, one for each department, division, location, and/or other organizational entity, you will need to establish a RDSH instance for *each* database, and install FLEETMATE on each instance. This will isolate each database for end-users in each organizational entity. Refer to your IT staff for additional information and assistance with the RDSH setup.

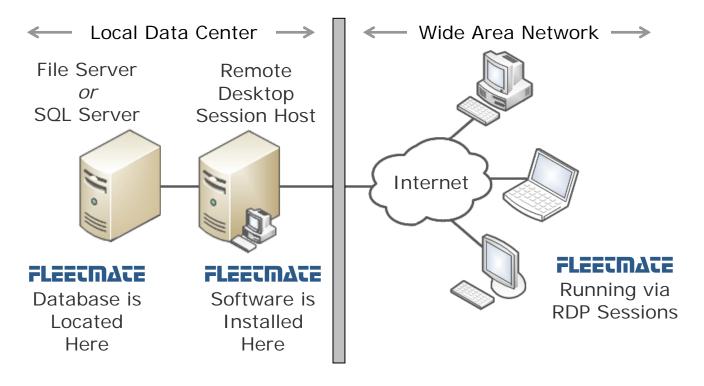


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Windows Remote Desktop Session Host (RDSH) Configuration

The picture below illustrates the basics of this type of configuration, and shows you where FLEETMATE and your FLEETMATE database are located.



Remote Desktop Services Configuration

The gray bar in the diagram above represents the boundary between your Local Area Network at your data center, and the Wide Area Network (WAN). The left-side of the boundary typically represents your main datacenter at your company.

Microsoft Remote Desktop Protocol (RDP) client software will need to be installed on each PC.

With a SQL Server database, use the **Microsoft OLE DB Driver for SQL Server** (*preferred*) when opening the database. If that provider is not available, use the **Microsoft OLE DB Provider for SQL Server**.



Remote Desktop Session Host Installation

Follow Microsoft documentation and recommendations for the correct procedure to follow to install FLEETMATE on your RDSH server.

On earlier releases of *Windows Terminal Services*, you may see a Control Panel wizard for installing an application on Windows Terminal Server. Refer to your Windows system documentation for the correct procedure to follow.

You may use an alternative approach to perform the installation from a command prompt at your server as follows:

- 1. Open a command session.
- 2. Type: Change User /Install [↓]
- 3. Execute the "fmsetup.exe" installer
- 4. Type: Change User /Execute [↓]
- 5. Close the command session.

A FLEETMATE registration key is stored under each user's Windows profile. This means that each user will need to enter their registration key *one-time* to register the software for their use.



Updating Existing FLEETMATE Installations

There is no need to uninstall your existing FLEETMATE software.

If you have a prior version of FLEETMATE already installed, you will need to update each PC on which FLEETMATE is installed.

If you are running FLEETMATE remotely using RDP sessions, you will only need to update FLEETMATE on your Windows Remote Desktop Session Host.

You will need to shutdown all FLEETMATE sessions before proceeding with the update process below.

Please follow these steps:

- Run the fmsetup.exe file on <u>each</u> PC (or on your Windows Remote Desktop Session Host). Do not start the latest version of FLEETMATE until the latest release is in-place on all of your PCs, or on your Windows Remote Desktop Session Host.
- 2. Start one (1) FLEETMATE session. This will allow the software to update its database to the latest format. Do not start any other FLEETMATE sessions until this process has successfully completed.

If you receive a message indicating that your database is in-use, this means that a prior user session did not end normally. Follow these steps to remedy the situation:

- a. Open the User Administration window, click the Clear Session Table button, and then close the User Administration window.
- b. Exit FLEETMATE and then restart it.
- c. If a Database Repair notice does not automatically appear, run the repair process manually using the File | Database | Utilities | Repair... menu option.
- 3. Your update will now be complete!



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Using Microsoft SQL Server for Data Storage

Microsoft SQL Server is a licensed product that is purchased separately. A SQL Server license is not included with FLEETMATE. Please consult with your DBA and IT staff for assistance with the information that follows.

The basic steps involved in installing FLEETMATE and storing your data in a SQL Server database are as follows:

- 1. Download and Install the Latest Release of FLEETMATE on Your PC
- Create Your SQL Server Database
 Contact your IT Support group or Database Administrator if you need assistance.
- 3. Disable System Security in your JET Database
 - a. Company Data | System Security | Disable
- **4. Migrate Your Existing FLEETMATE JET Standard Database** (Optional) This is only necessary if you were previously running the standard JET database that came with FLEETMATE.
 - a. Run a Database Repair
 This will reorganize your existing FLEETMATE JET database in preparation for the data migration below.
 - b. Run the Migration Utility (fm32mig.exe)
 This will migrate the data in your prior FLEETMATE JET database to your new SQL Server database.
- 5. Begin Using FLEETMATE with your data on SQL Server
 - a. View the Online Lessons at www.fleetmate.com
 - b. Review the Customer Guides at www.fleetmate.com
- 6. Disable your FLEETMATE JET Standard Database (Recommended)
 Rename or archive and delete your prior FLEETMATE JET database file.
 This will prevent users from mistakenly entering data into the prior JET database file.



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Creating your FLEETMATE SQL Server Database

A script is included in FLEETMATE that will make it easy for you to create your initial FLEETMATE SQL Server database. You will need to run the scripts on a PC or server where SQL Server Management Studio (SSMS) is installed.

Script files are located in the C:\Program Files (x86)\FLEETMATE \Database\Scripts folder. The script filename to use to create your new, empty FLEETMATE database is:

• Create_FLEETMATE.sql

Double-click on Create_FLEETMATE.sql to open it in a new query window. Or, open Create_FLEETMATE.sql in Notepad, copy the contents, and paste the contents into a new query window.

The *default* name for your new database on SQL Server will be FLEETMATE. You may edit the database name if you like

You will need to edit the paths for *both* the database and the log file to match your SQL Server directory structure.

Once you have adjusted your database name and path settings, click the *Execute* button to run the script. This will create your new, empty FLEETMATE database on SQL Server.

If you want to create a "Test" database, use SSMS to copy your database, or edit the Create_FLEETMATE.sql script to use a different database name (e.g., FLEETMATE_TEST), then execute the script once again.

In some versions of SQL Server Management Studio, you will need to press the [F5] key to refresh your display, so that you can see your new FLEETMATE database(s).



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Migrating Your Existing FLEETMATE Database

If you have an active Enterprise Technical Support subscription, we'll migrate your prior JET data for you, and we'll return a "bak" file to you that your DBA can use to quickly create your FLEETMATE database on your SQL Server instance. Send an email to support@fleetmate.com for additional information.

If you did not previously use FLEETMATE, you can skip this section. However, if you had previously used FLEETMATE with the standard JET database, you can migrate your existing JET data to your new FLEETMATE SQL Server database. It may be helpful for you to seek assistance from your IT support staff and/or your Database Administrator as you proceed through this process.

To prepare to migrate your prior JET data, make sure that your PC has the latest release of FLEETMATE installed on your PC. If in doubt, reinstall FLEETMATE on your PC using the download link on the Download page of the FLEETMATE Website.

Start FLEETMATE. If you were previously running a prior release of FLEETMATE, a database repair notice will appear... click OK to proceed. If you do not see this notice appear, run a database repair manually (File | Database | Utilities | Repair...). This will help ensure that your database is organized properly, and any wasted or *slack* space is reclaimed.

Next, if you were previously using the Security feature in your FLEETMATE JET database, disable security. To do this, click Company Data | System Security | Disable...

The migration process requires that all existing Work Order Numbers be **unique**. There also cannot be any missing work order numbers. You may wish to review your current data prior to attempting a migration.

The Data Migration Utility shortcut will appear in the FLEETMATE program group on your PC. Use this shortcut to start the Data Migration Utility.

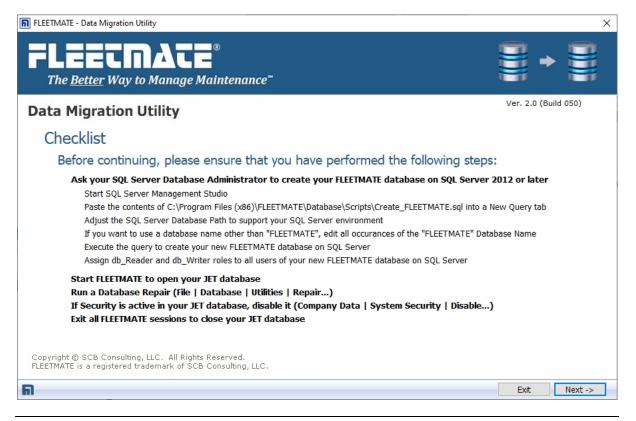
If you have removed the shortcut, navigate into the C:\Program Files (x86)\FLEETMATE folder on your PC, and double-click on the fm32mig.exe file.



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Migrating Your Existing FLEETMATE Database



Data Migration Utility - Initial Checklist Window

The Checklist provides a list of items that you need to perform in order to proceed.

Click Next > to proceed to the next step.

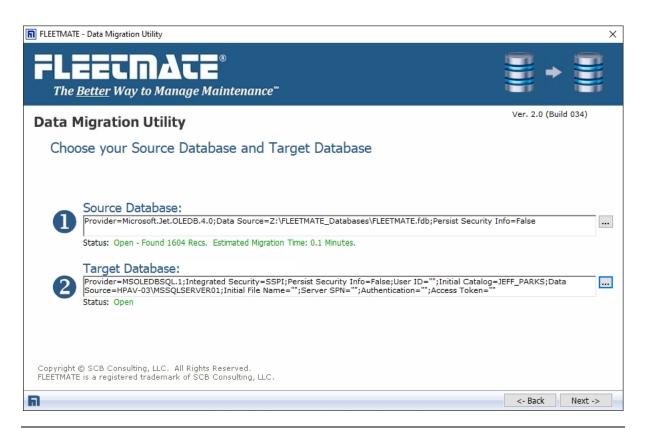


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Migrating Your Existing FLEETMATE Database

- The first step is to click the **Browse** ... button to locate and select your **Source** FLEETMATE JET database file. If any errors are reported when you select your source database, stop and correct those issues.
- Next, click the **Browse** ... button select the **Target** FLEETMATE database on SQL Server. This is the database on SQL Server that will receive the migrated data from your source database.



Data Migration Utility - Select Source and Target Databases

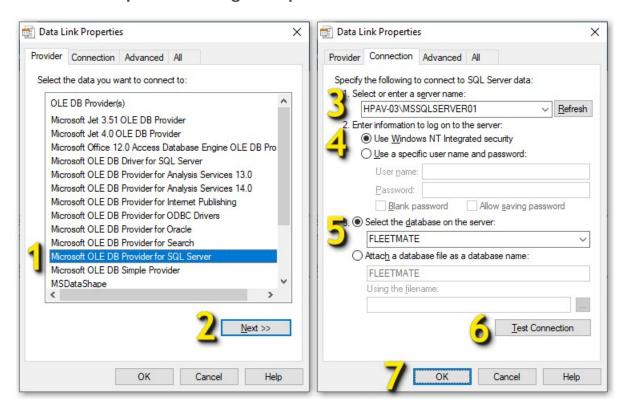


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Migrating Your Existing FLEETMATE Database

Data Link Properties Dialog - Steps



Windows Data Link Properties Dialog

The steps required are numbered in yellow. Simply progress through these steps to select the **Target** FLEETMATE SQL Server database.



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Migrating Your Existing FLEETMATE Database

Data Link Properties Dialog – What the Steps Mean

1. Select the OLE DB Driver or Provider

Always use Microsoft OLE DB Driver for SQL Server if available. If not available, select Microsoft OLE DB Provider for SQL Server.

2. Click Next >

3. Select the Server

This is the server where your database is stored. Contact your Database Administrator if you do not know the server name.

4. Select the Login Method

Integrated Security is the RECOMMENDED method. If you must use a SQL Server Login, be sure to check the Allow Saving Password box.

Your Database Administrator may have configured your system in a different way, so you may need to contact your administrator for additional assistance.

5. Select your database

The default name for your production database will be **FLEETMATE**. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.

6. Click [Test Connection]

This will verify your connection. If the test fails, you will need to contact your administrator for additional information and/or assistance.

7. Click [OK].

You will return to the initial window in the Data Migration Utility. Your SQL Server connection specifications should appear in the box labeled Target SQL Server Database. If any errors appear, stop and contact your Database Administrator or IT Support personnel for assistance.

After making these settings you will be returned to the prior Window. Click

Next > to continue to the next step.

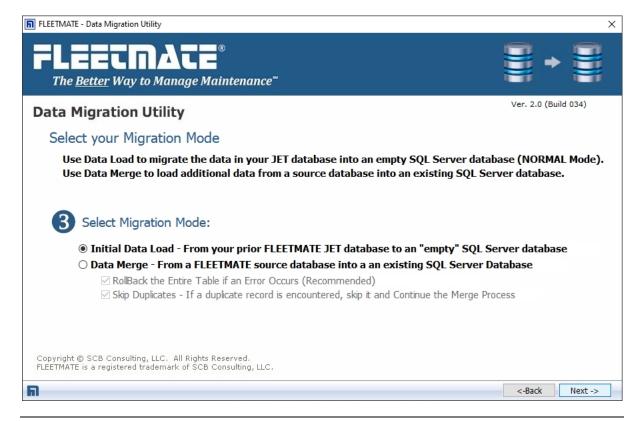


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Migrating Your Existing FLEETMATE Database

Select Your Migration Mode



Data Migration Utility - Select Migration Mode

Use the **Initial Data Load** mode to migrate the data in your prior JET database, into your new empty SQL Server database.

The Data Merge mode enables you to migrate certain tables from a second FLEETMATE JET database if necessary.

Click Next > to proceed to the next step.



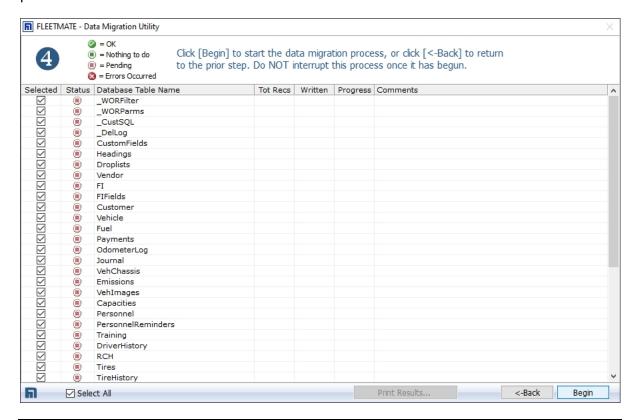
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Migrating Your Existing FLEETMATE Database

Migration Status

The next and final window to appear will list the tables that are available for the migration process. You will typically want to migrate data in all tables. However, you do have the option of skipping certain tables during the migration process.



Data Migration Utility - Status Page

The time required depends upon the volume of data in your original database. Consider 60 minutes as being adequate for most any migration.

Click the [**Begin**] button to begin the migration process. Do not interrupt this process once it has begun.

As the migration proceeds, the window will display migration statistics. A percentage indicator will be displayed for each table to indicate progress.



Migrating Your Existing FLEETMATE Database

Migration Status

Icons are used on this window to indicate table migration status as follows:

- OK table was migrated successfully with no errors.
- OK nothing was done, there were no source records to migrate.
- Pending the table has not yet been processed.
- Error an error occurred during processing. This condition must be investigated and corrected before trying to migrate the table once again.

If an error occurs while a table is being processed, all records written will be *rolled-back*. This means that if you have 100 vehicle records and an error occurs on vehicle number one hundred (100), none of the vehicle records will be migrated. This is done to give you an opportunity to attempt migration of that table once again, once the data issue has been identified and corrected.

Once the migration process completes you can print a listing of the tables with status information by clicking the [**Print Results...**] button.

Click [Exit] to close the Data Migration Utility.

If any errors occur during migration, and this is an *Initial Load* of data, it is often quickest and easiest to delete the database on SQL Server. Then, use SQL Server Management Studio to create a new empty database using the database creation script. Lastly, start the migration process once again with the corrected source data. The migration process <u>must</u> be free of errors.

Send a message to support@fleetmate.com if you have questions or if you need assistance. We will be glad to assist you.



SQL Server Security and Permissions

It will be best to consult with your DBA (database administrator) to ensure that correct values are defined below.

Each SQL Server Login account will need to grant permission to perform the following database functions:

- Add/Insert
- Update
- Delete
- Execute

Step-by-step, the process is as follows:

1. Create the Login

This will typically be a Domain/Active Directory user account, but it could be a specific SQL Server Login account. Contact your DBA if you are not certain. Set the default database.

2. User Mapping

The Database Role Membership should include: 1)-db_datareader, and 2)-db_datawriter.

3. Status

Make certain that the permission to connect is granted, and that the login is enabled.

If you need any assistance, please send a message to support@fleetmate.com or call us at 443-808-2719 (Weekdays, 9 AM to 5 PM EDT). We will be glad to assist you.

Thank you once again for choosing to install FLEETMATE.