

How to Create a Location Access List

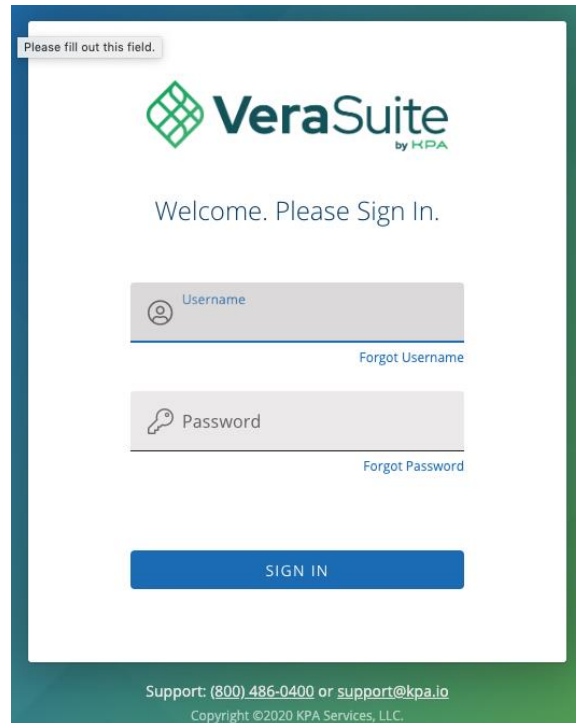
A Guide for Clients

Location Access Lists in Vera Suite are for clients with multiple locations. They allow you to control which employees can view location-specific information or information across locations.

You can only create or modify access lists for accounts that you have visibility to.

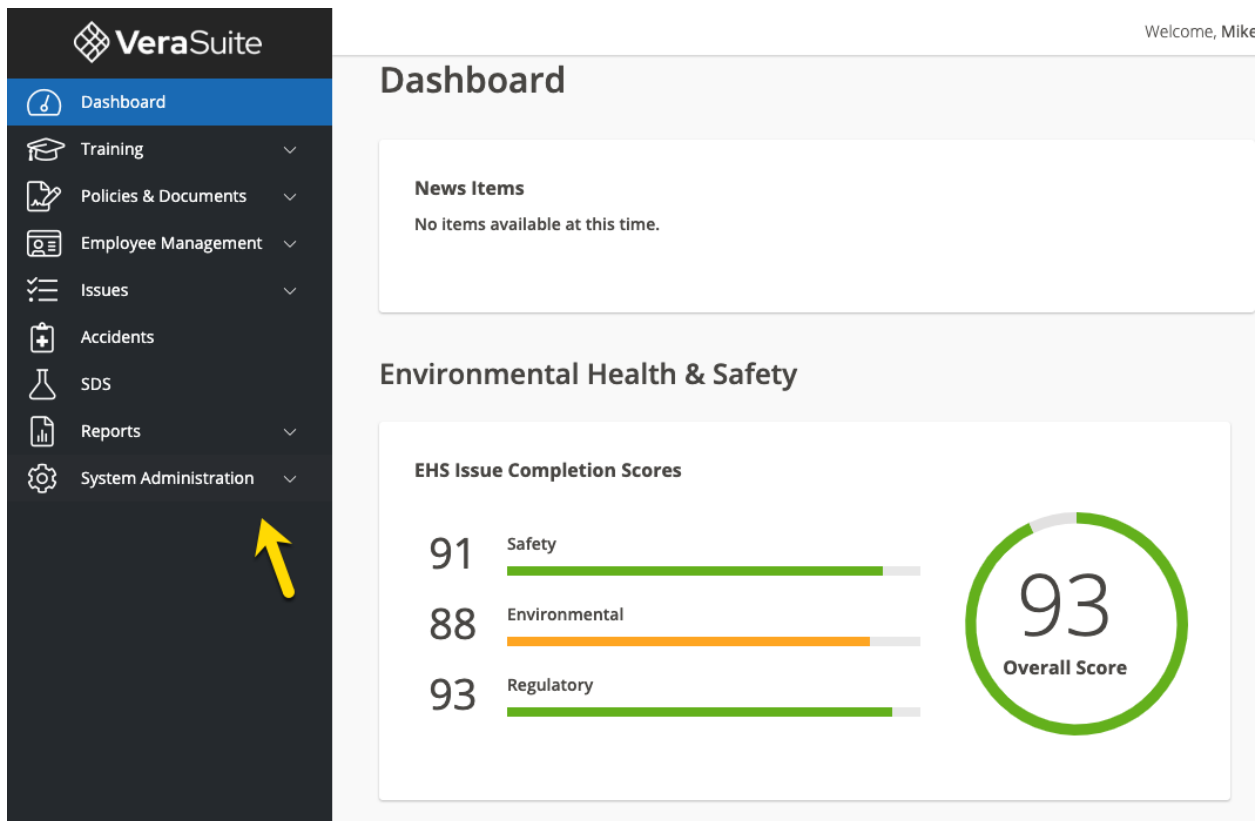
1. Sign into Vera Suite

Go to www.VeraSuite.com. Enter your **Username** and **Password**.



The screenshot shows the Vera Suite login interface. At the top left, there is a small grey box with the text "Please fill out this field." The main header features the Vera Suite logo, which consists of a green diamond icon followed by the text "VeraSuite by KPA". Below the logo, the text "Welcome. Please Sign In." is displayed. There are two input fields: the first is labeled "Username" and has a person icon to its left; below it is a link that says "Forgot Username". The second is labeled "Password" and has a key icon to its left; below it is a link that says "Forgot Password". At the bottom of the form is a blue button with the text "SIGN IN". At the very bottom of the page, there is a footer with the text "Support: (800) 486-0400 or support@kpa.io" and "Copyright ©2020 KPA Services, LLC."

2. Select “System Administration”



Welcome, Mike

Dashboard

News Items
No items available at this time.

Environmental Health & Safety

EHS Issue Completion Scores

Category	Score
Safety	91
Environmental	88
Regulatory	93
Overall Score	93

From there, select **Location Access**.

3. Add New Access List

Location Access

Use Location Access to create and customize lists of locations within your organization, then assign them to employees to grant them access to those locations in the system.



Access List Name	Description	Assigned To	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	
No records available.			
<input type="button" value="◀"/> <input type="button" value="▶"/>		0 - 0 of 0 items	<input type="text" value="10"/> items per page

Select the **Add New Access List** button.

4. Build the Access List

Give the location access list a name and include a description.

Client Administration

Location Access List Details

Access List Details

Access List Name

Access List Description

5. Choose Locations

Select the locations that you want to include in your location access list. For example, if you have several locations in a certain district, you may select them so that the managers of that district can view information for all of those locations, but not for locations outside of their district.

Locations

Use the checkboxes to add or remove Locations from this Access List, then select Save or Save As New Access List below.


Select	Location Name ↑ 2	Location ID	Street Address	State
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Nevada Store			
<input checked="" type="checkbox"/>	California Store			
<input type="checkbox"/>	New Mexico Store			
<input checked="" type="checkbox"/>	Washington Store			
<input checked="" type="checkbox"/>	Oregon Store			

« ◀ 1 ▶ »
 items per page

Save.

6. Add Employees

Back on the Location Access List main page, toggle to the **Employees** tab. Select the employees you want to see location information for the locations that are part of the location access list.

Locations **Employees** 

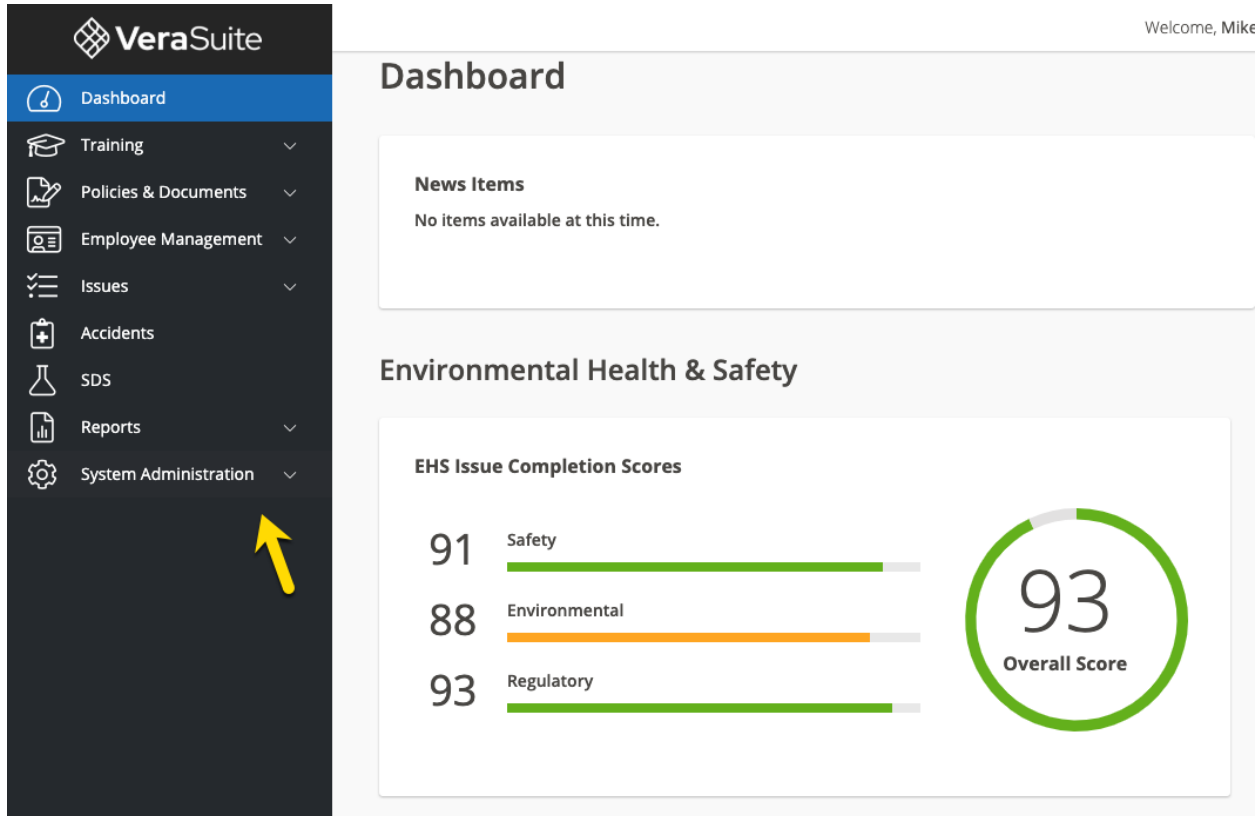
Use the checkboxes to add or remove Employees from this Access List, then select Save or Save As New Access List below.

Select	Last Name	First Name	Employee ID	Role	Assigned Access List	Primary Location
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Doe	John		Client Employee		Aacme Group
<input type="checkbox"/>	Sample	Peggy		Client Employee		Aacme Group
<input checked="" type="checkbox"/>	Case	John		Client Admin	AAcme West District	Aacme Group

Save. The employees will now be able to see designated locations' information.

Add New User to An Existing Access List

OPTION 1: Select **System Administration** from your left navigation menu, then choose **Location Access**.



The screenshot shows the VeraSuite dashboard. On the left is a dark navigation menu with the following items: Dashboard, Training, Policies & Documents, Employee Management, Issues, Accidents, SDS, Reports, and System Administration. A yellow arrow points to the 'System Administration' item. The main content area is titled 'Dashboard' and includes a 'News Items' section with the message 'No items available at this time.' Below that is the 'Environmental Health & Safety' section, which features 'EHS Issue Completion Scores'. This section displays three horizontal progress bars: Safety (91), Environmental (88), and Regulatory (93). To the right of these bars is a large circular gauge showing an 'Overall Score' of 93. The top right corner of the dashboard says 'Welcome, Mike'.

Select **View/Edit Details** next to the desired list.

Location Access

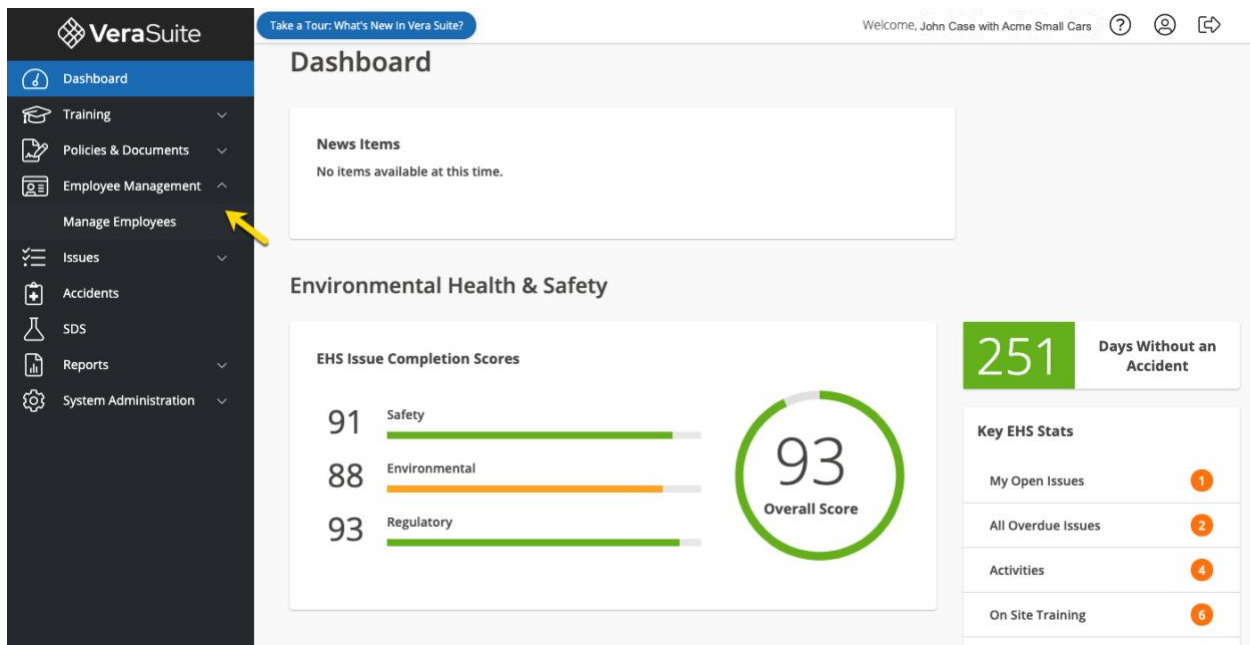
Use Location Access to create and customize lists of locations within your organization, then assign them to employees to grant them access to those locations in the system.

[ADD NEW ACCESS LIST](#)

Access List Name	Description	Assigned To	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AAcme West District	This is the access list that has every Location for AAcme ...	0 Employees	View/Edit Details

Toggle to the **Employees** tab and select the new user who should be part of this access list. **Save**.

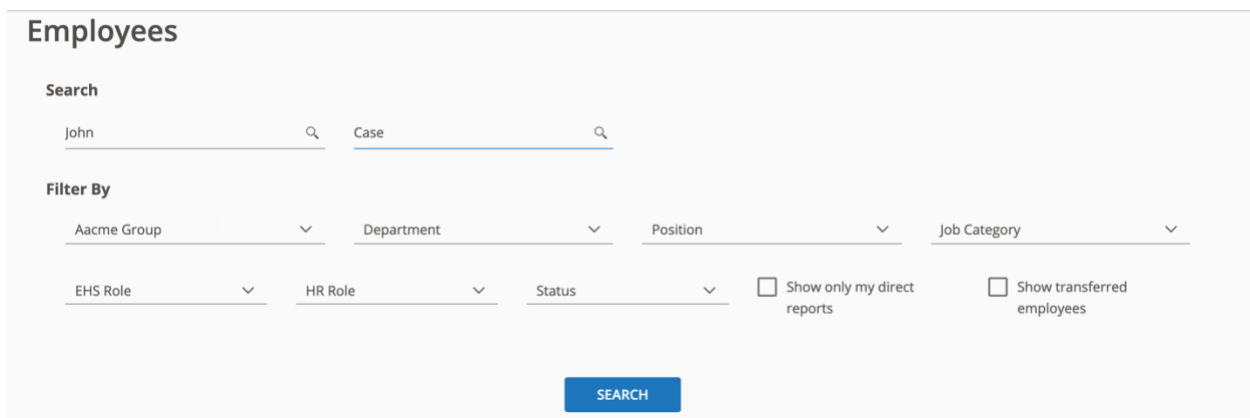
OPTION 2: Select **Employee Management** from the left navigation menu, then choose **Manage Employees**.



The screenshot shows the VeraSuite dashboard interface. On the left is a dark navigation menu with the following items: Dashboard, Training, Policies & Documents, Employee Management (highlighted with a yellow arrow), Manage Employees, Issues, Accidents, SDS, Reports, and System Administration. The main content area is titled 'Dashboard' and includes a 'News Items' section with no items available. Below that is the 'Environmental Health & Safety' section, which features 'EHS Issue Completion Scores' for Safety (91), Environmental (88), and Regulatory (93), along with an 'Overall Score' of 93. To the right, there is a 'Days Without an Accident' counter showing 251 and a 'Key EHS Stats' table with the following data:

Key EHS Stats	
My Open Issues	1
All Overdue Issues	2
Activities	4
On Site Training	6

Search for the employee's name or scan the list of employees. Press **Enter** key or **Search** button.

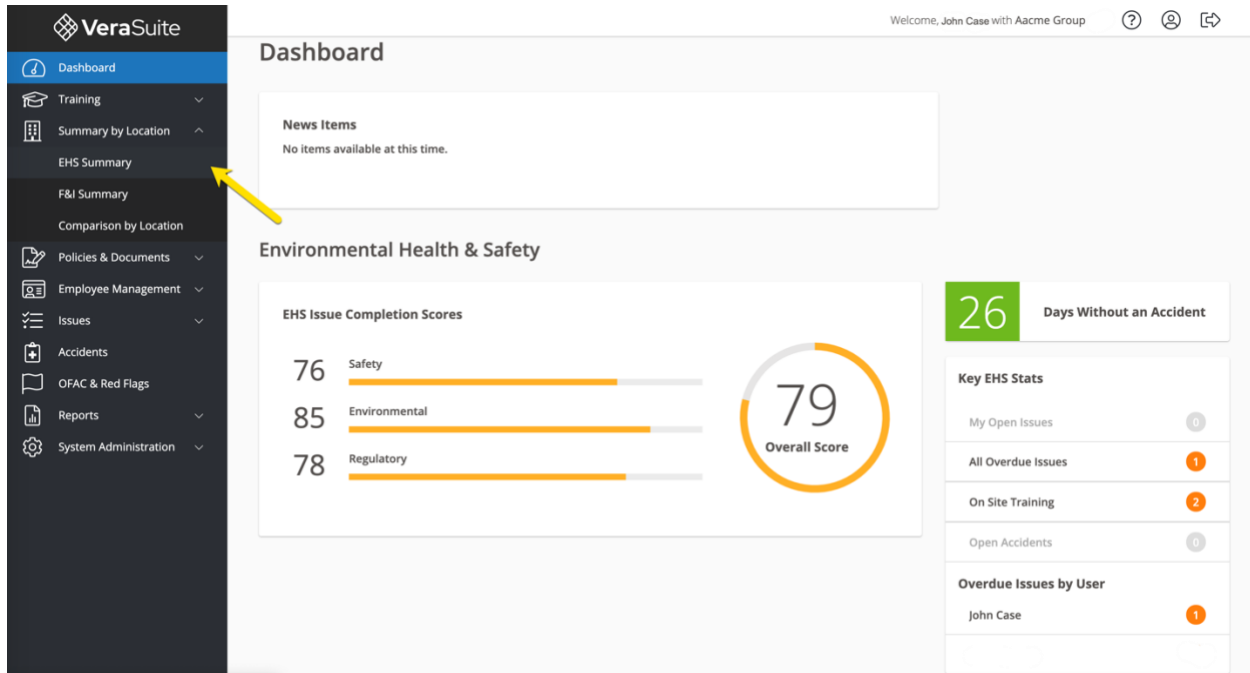


The screenshot shows the 'Employees' search and filter interface. It includes a search bar with the text 'John Case' and a 'SEARCH' button. Below the search bar are filter options categorized under 'Filter By':

- Aacme Group (dropdown)
- Department (dropdown)
- Position (dropdown)
- Job Category (dropdown)
- EHS Role (dropdown)
- HR Role (dropdown)
- Status (dropdown)
- Show only my direct reports
- Show transferred employees

View Location Information

To view location information, select **Summary by Location** from your left navigation.



The screenshot shows the VeraSuite dashboard interface. On the left is a dark navigation sidebar with the following menu items: Dashboard, Training, Summary by Location (highlighted with a yellow arrow), EHS Summary, F&I Summary, Comparison by Location, Policies & Documents, Employee Management, Issues, Accidents, OFAC & Red Flags, Reports, and System Administration. The main content area is titled 'Dashboard' and includes a 'News Items' section with the message 'No items available at this time.' Below this is the 'Environmental Health & Safety' section, which features 'EHS Issue Completion Scores' with a bar chart showing scores of 76 for Safety, 85 for Environmental, and 78 for Regulatory. A circular gauge displays an 'Overall Score' of 79. To the right of the scores is a 'Days Without an Accident' widget showing 26 days. Further right is a 'Key EHS Stats' section with a list of metrics: My Open Issues (0), All Overdue Issues (1), On Site Training (2), Open Accidents (0), and Overdue Issues by User (John Case: 1).