

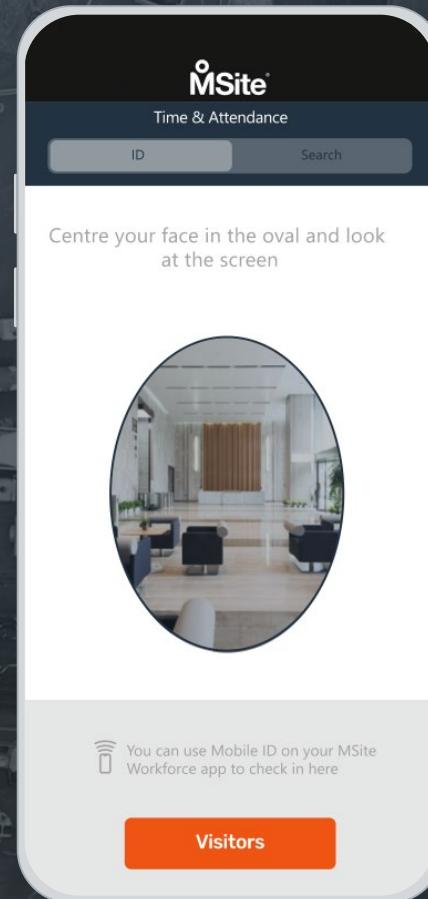


Training Hub

Visitor Management.

Welcome to the MSite Academy.

This course will go through how to deploy Visitor Management on site using Visitor Cards.

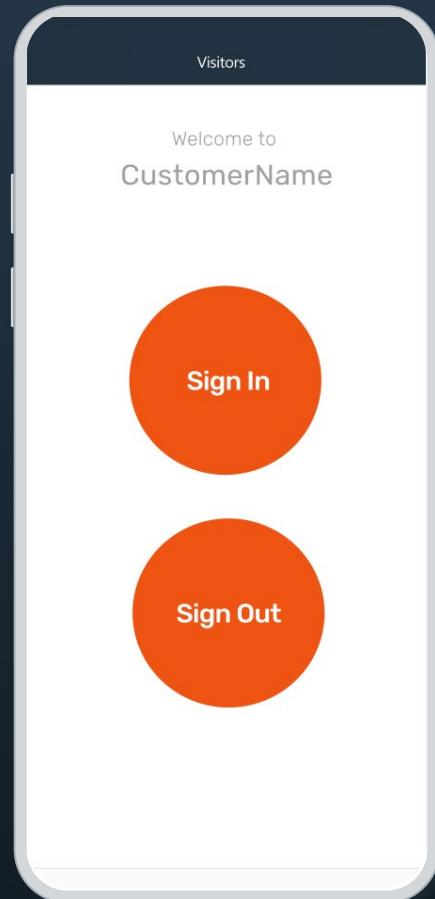


Visitor Management.

This guide outlines the steps for using the **Visitor Management** system with **Visitor Cards**. Designed to create a seamless and easy-to-follow process of granting a visitor access to site.

We will look at the following areas:

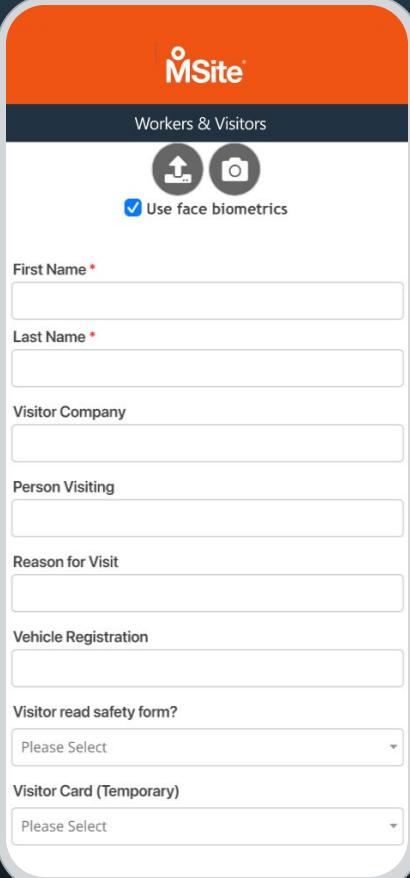
- Adding a Visitor Manually
- Adding a Visitor on the Supervisor App
- Creating additional Visitor Cards and Profiles
- FAQ's



How Visitor Cards Work.

The **Visitor Card** feature within the **Visitor Management** system requires each card to be assigned to a specific profile.

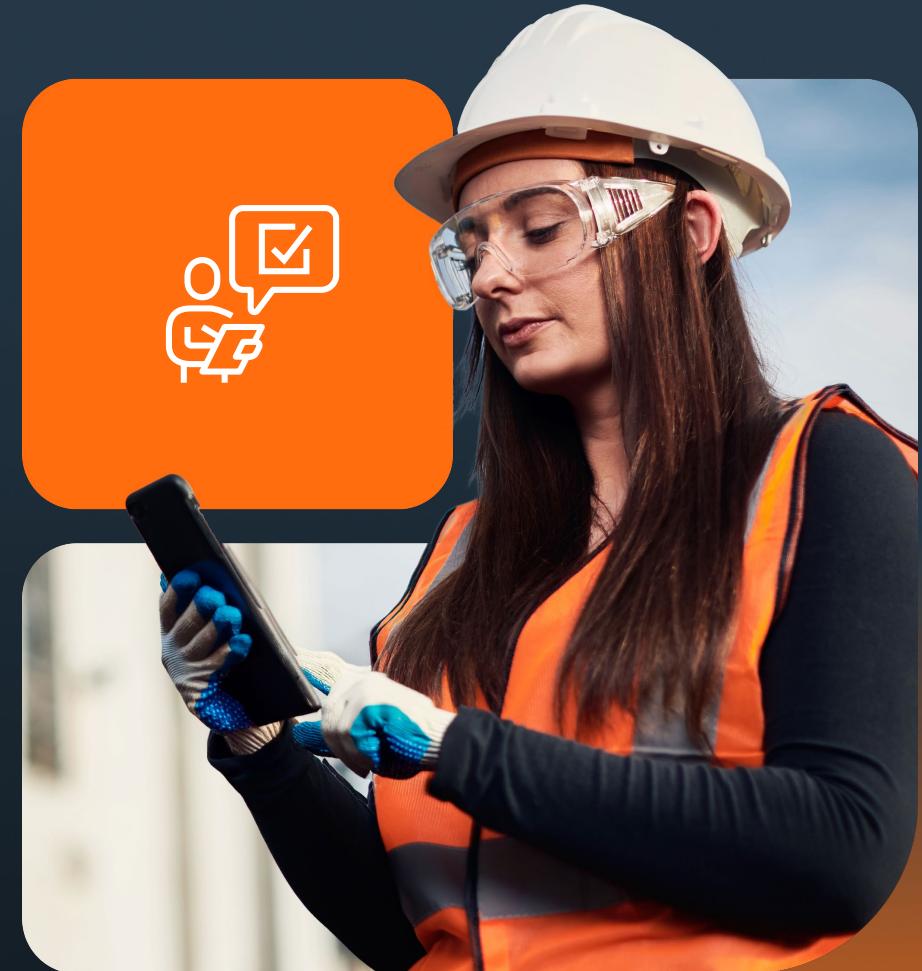
- When a visitor arrives on site, this card profile is linked to their visitor record, allowing them to use the assigned card
- At the end of each day, the card and site associations are automatically cleared from the visitor's profile, leaving the **Visitor Card** available to be used again the following day



The image shows a mobile application interface for 'Workers & Visitors'. The top bar is orange with the 'MSite' logo. Below it, a dark bar displays 'Workers & Visitors'. The main screen has an orange header. It features a camera icon with an upward arrow and a checkmark, labeled 'Use face biometrics'. Below this are several input fields with labels: 'First Name *' (with a red asterisk), 'Last Name *' (with a red asterisk), 'Visitor Company', 'Person Visiting', 'Reason for Visit', 'Vehicle Registration', 'Visitor read safety form?' (with a dropdown menu showing 'Please Select'), and 'Visitor Card (Temporary)' (with a dropdown menu showing 'Please Select').

Module 1:

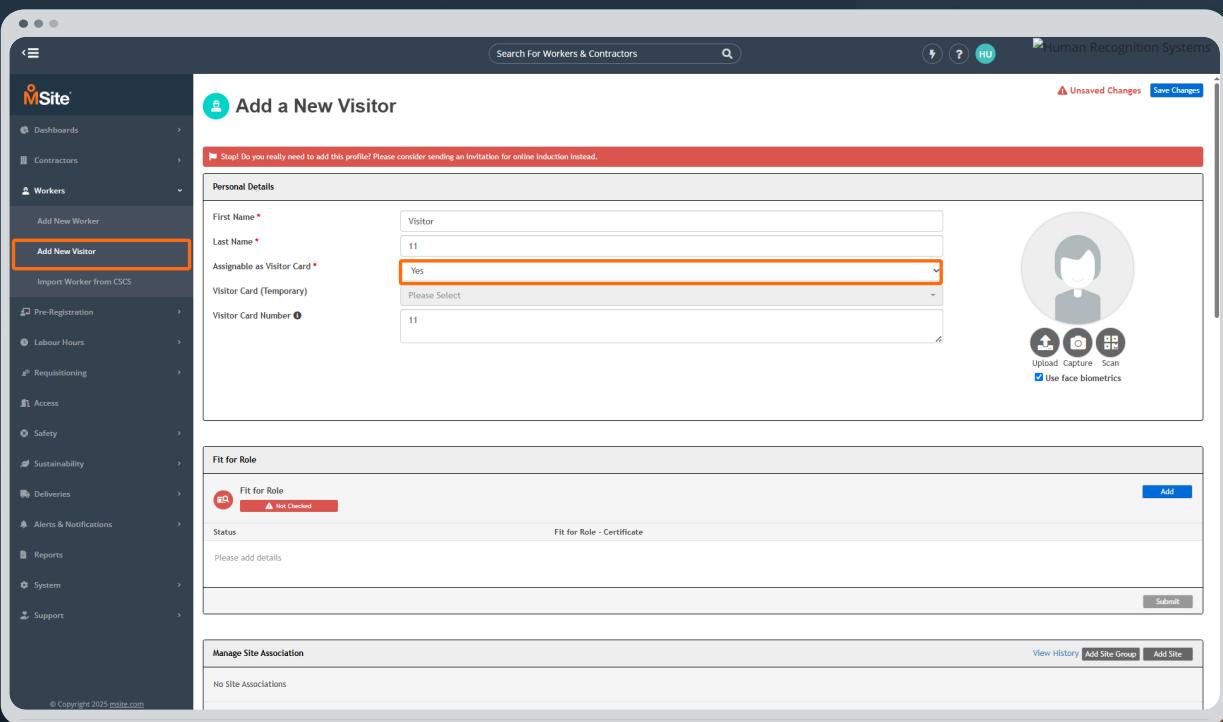
Creating Visitor Card Profiles.



Creating Additional Visitor Card Profiles.

To create an additional **Visitor Card** profiles, select:

- **Workers**  **Add New Visitor**
- Choose “**Assignable as Visitor Card**”. This will create a profile that the Visitor Card is linked to
- Next, enter the **name & number** to label this card



The screenshot shows the MSite software interface for adding a new visitor. The left sidebar shows the navigation menu with 'Add New Visitor' selected. The main form is titled 'Add a New Visitor' and contains the following fields:

- Personal Details:** First Name: Visitor, Last Name: 11, Assignable as Visitor Card: Yes (highlighted with an orange box).
- Fit for Role:** Fit for Role: Not Checked, Status: Please add details.
- Manage Site Association:** No Site Associations.

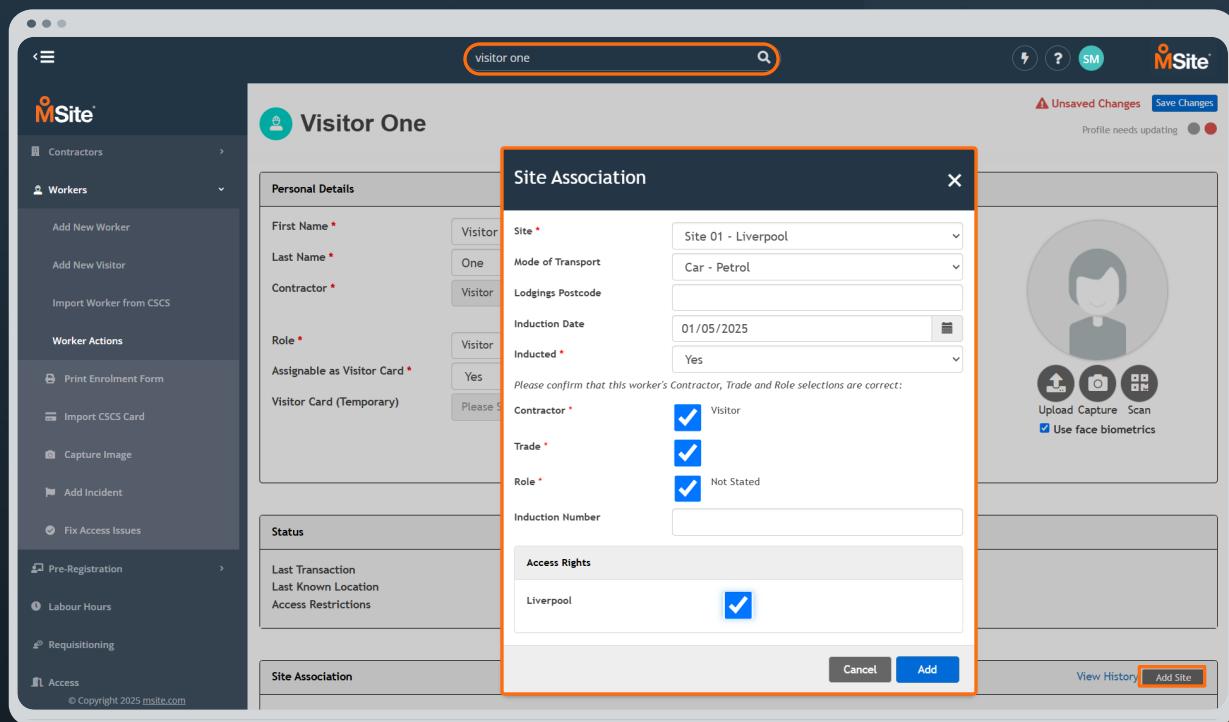
On the right side of the interface, there is a placeholder for a profile picture with icons for upload, capture, and scan, and a checkbox for 'Use face biometrics'.

Visitor Card Profiles – Site Association.

To complete the **Visitor Card Profile**, it needs to be **associated to a site** and marked as inducted. Follow the below steps:

- Search for the assignable **Visitor Profile** as you would a worker.
- **Add** the site it will be associated to
- Then, and **“Mark as Inducted”**

This will now allow the profile to be assigned to a site visitor.



The screenshot shows the MSite software interface. On the left, there is a sidebar with options like 'Contractors', 'Workers', 'Add New Worker', 'Add New Visitor', 'Import Worker from CSCS', 'Worker Actions', 'Print Enrolment Form', 'Import CSCS Card', 'Capture Image', 'Add Incident', 'Fix Access Issues', 'Pre-Registration', 'Labour Hours', 'Requisitioning', and 'Access'. The main area shows a profile for 'Visitor One'. A modal dialog box titled 'Site Association' is open, containing fields for 'Site' (Site 01 - Liverpool), 'Mode of Transport' (Car - Petrol), 'Lodgings Postcode', 'Induction Date' (01/05/2025), 'Inducted' (Yes), 'Contractor' (Visitor), 'Trade' (Visitor), 'Role' (Not Stated), and 'Access Rights' (Liverpool). A confirmation message at the bottom of the dialog box reads: 'Please confirm that this worker's Contractor, Trade and Role selections are correct: Contractor: Visitor, Trade: Visitor, Role: Not Stated'.

Module 2:

Adding Visitors Manually.



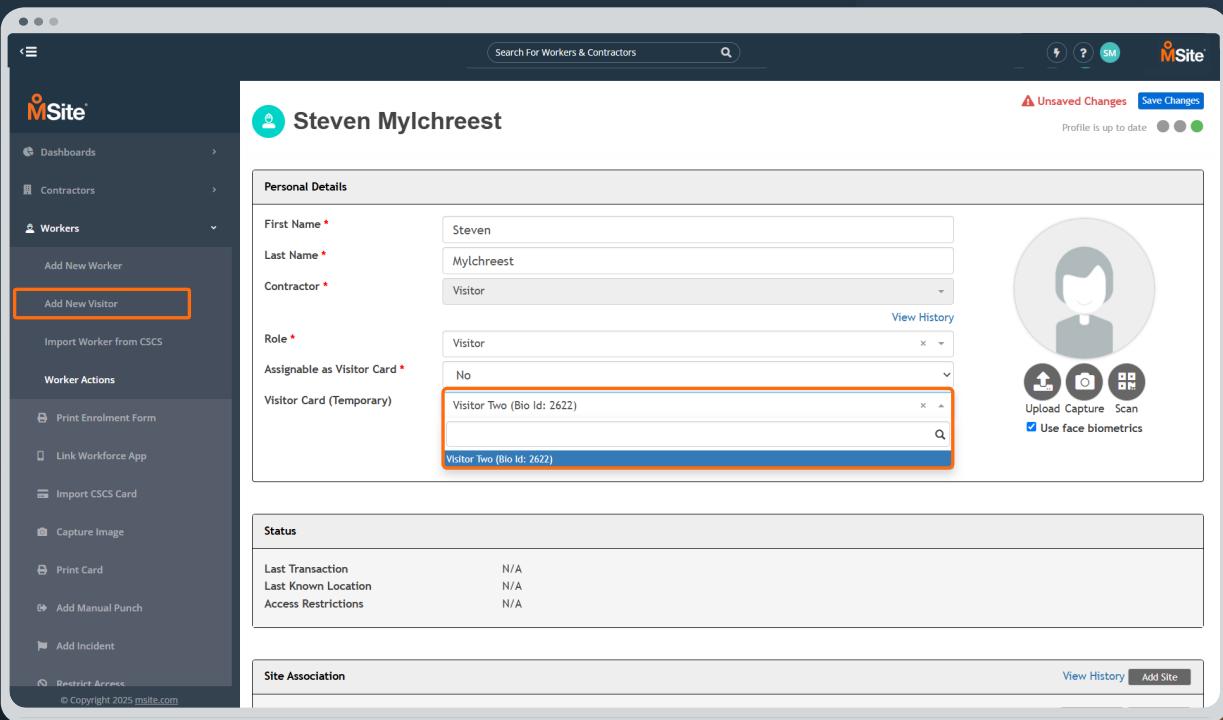
Adding Visitors Manually.

To add a visitor to site manually from your **MSite Dashboard**, select:

- **Workers**  **Add New Visitor**

This new process will populate the **Contractor** and **Role** fields automatically as **Visitors** hiding them from their profile, and will also require some or all the following additional information:

- **Name and Company of visitor**
- **Person Visiting and reason for visit**
- **Choose which Visitor Card you wish to assign to that individual**



Module 3:

Inviting Visitors - Pre-Registration.



Inviting Visitors - Pre-Registration

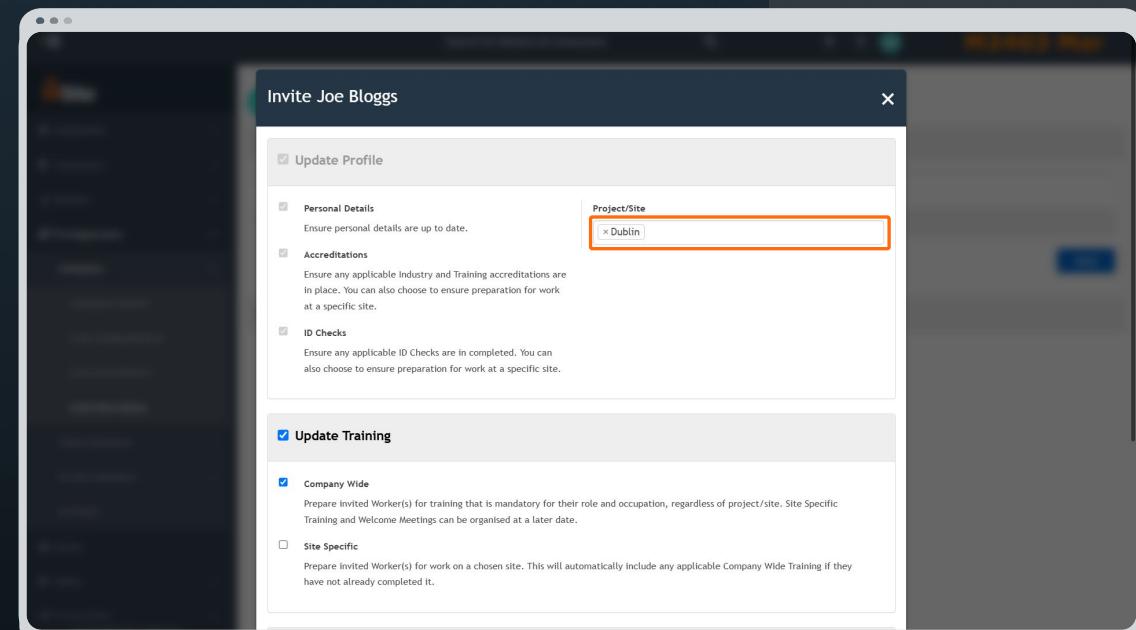
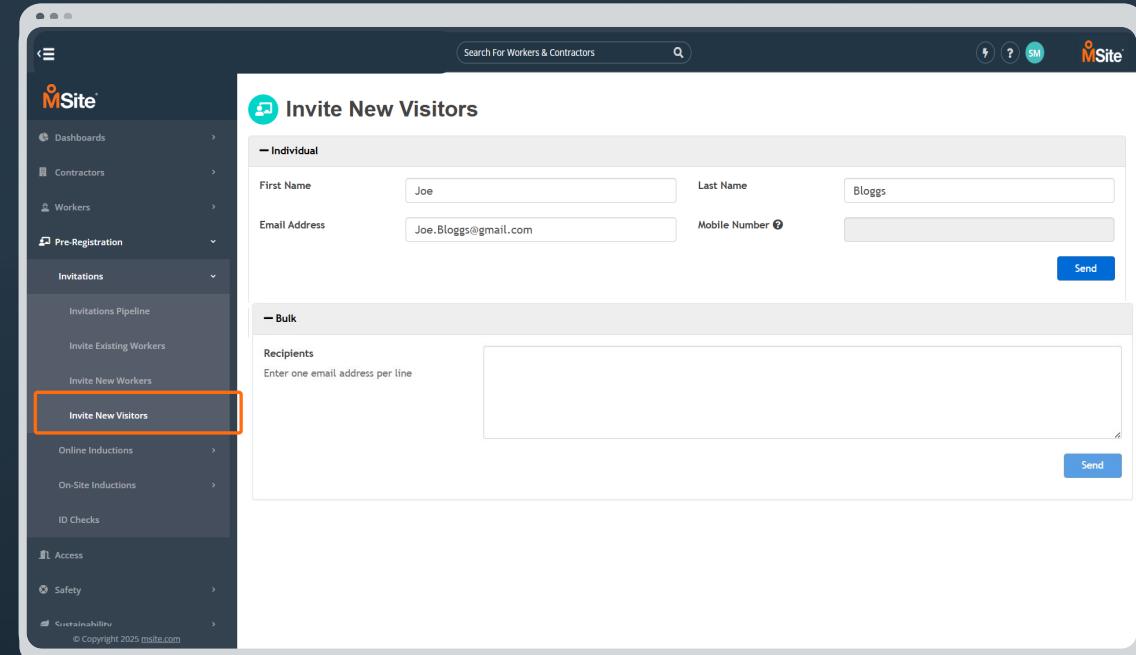
Inviting via **Pre-Registration** enables the visitor to be granted **access to site** prior to arrival.

Pre-registration ➔ **Invite New Visitors** ➔ **Enter the Visitor Information**

If you are expecting **multiple visitors**, you can utilise the **Bulk** invite option which will require just the recipients email addresses.

Next, select the site they will be invited to and click, “**Send**”.

The visitor will now receive an email and be able to complete their profile **before** arriving to site.



Module 4:

Adding Visitors - Supervisor App.

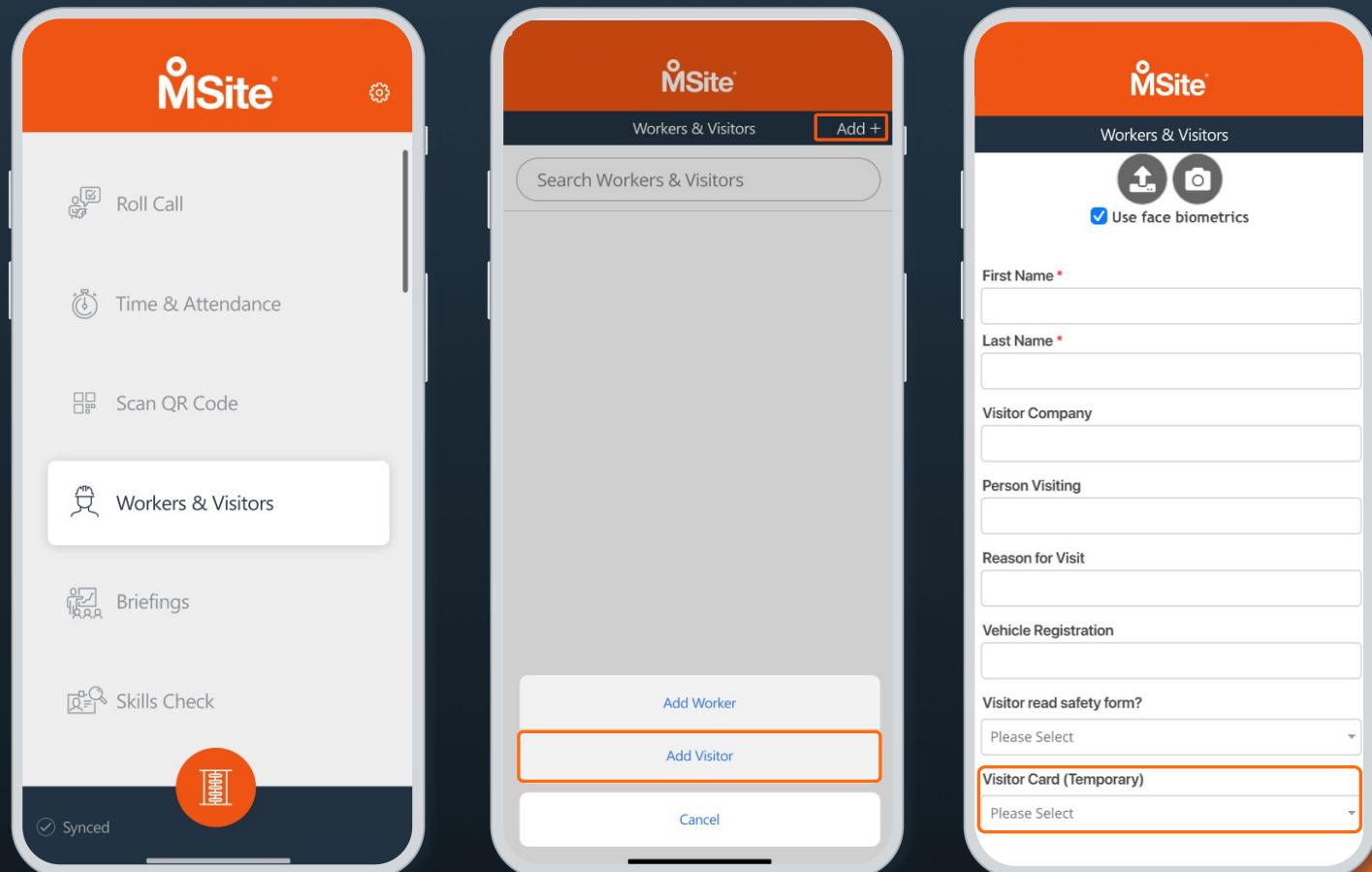


Adding Visitors - Supervisor App.

With the **Visitor Management** system, you can also add visitors manually via the **Supervisor App**. To do so, simply:

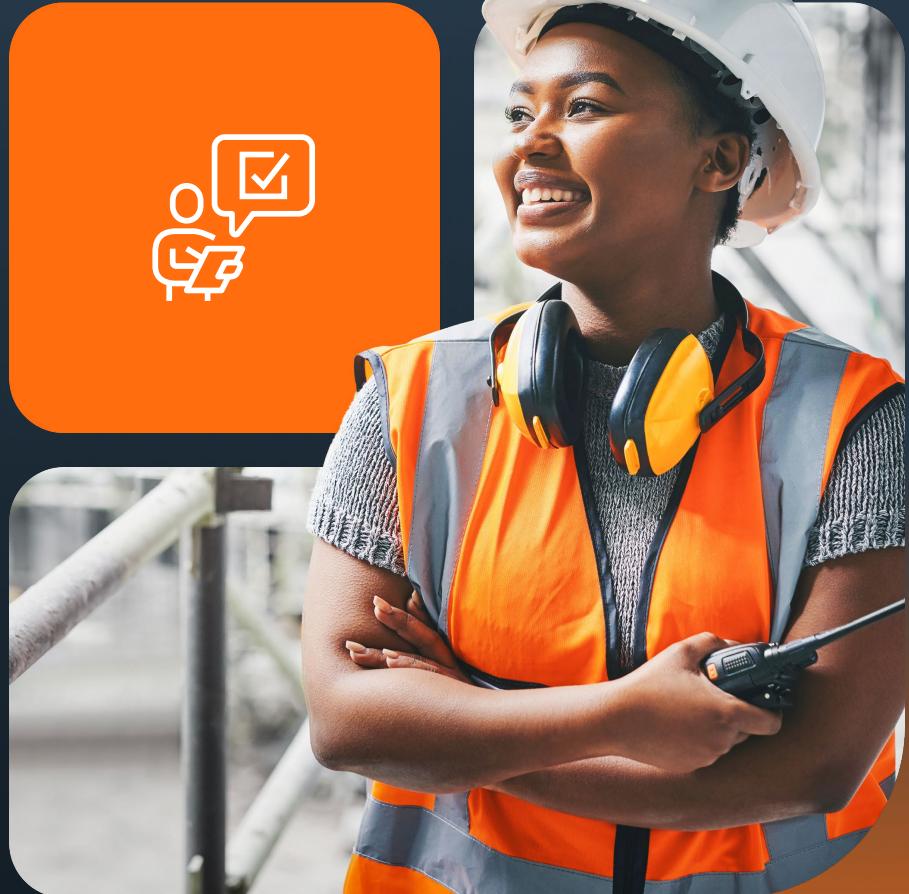
- Select **Workers & Visitors**
- Select **Add +**
- Then, **Add Visitor**
- Enter the visitor details, then select which **Visitor Card** to assign to them

The visitor will now be able to go through the sign in process using the assigned **Visitor Card** to gain access to site.



Module 5:

Sign In Visitors - Supervisor App.

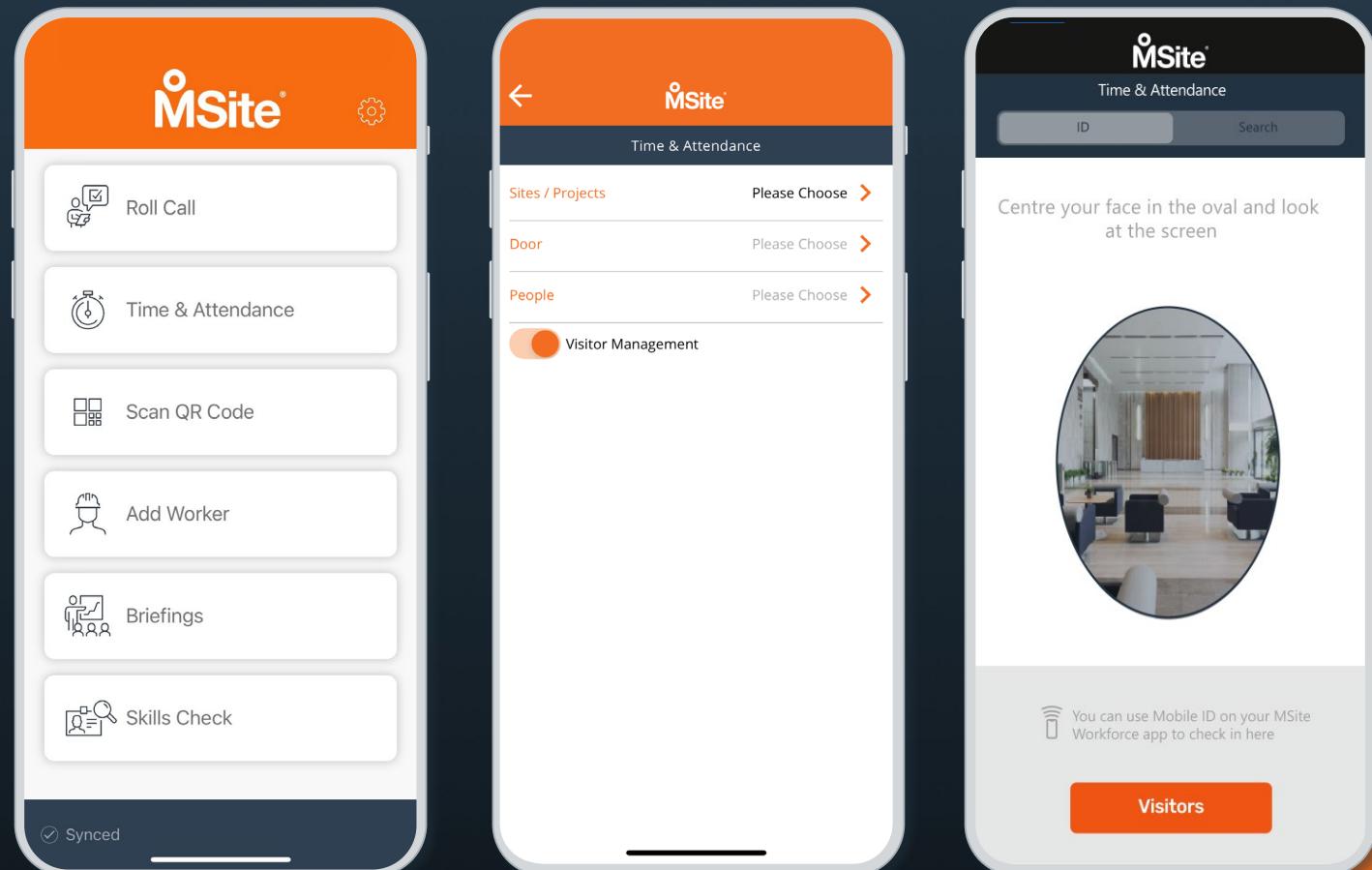
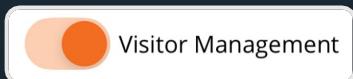


Signing In Visitors - Supervisor App.

To facilitate signing in via the **Supervisor App**, you will first need to open the **Time & Attendance** option.

This will then allow you to select which **Site / Project** and **Door** you wish to sign people into.

Ensure you switch on the **Visitor Management** toggle.

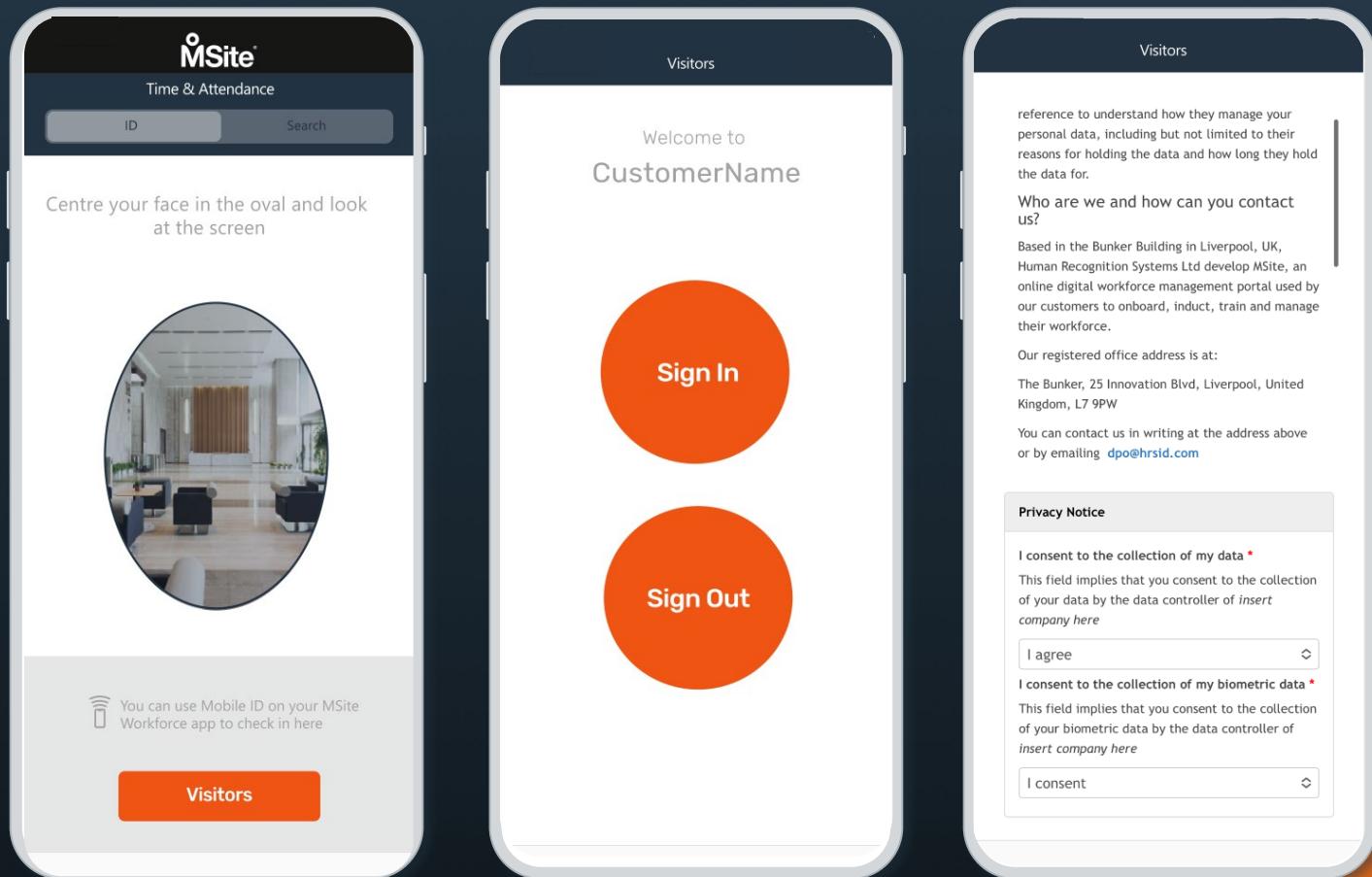


Visitors Signing In Process.

Once the “**Time & Attendance**” has been activated, you will be able to set the app to **sign visitors in**.

To do so follow the below process:

- Click **Visitors**
- Select whether to **Sign In** or **Out**
- Confirm **consent** for collection of data and **biometric data**



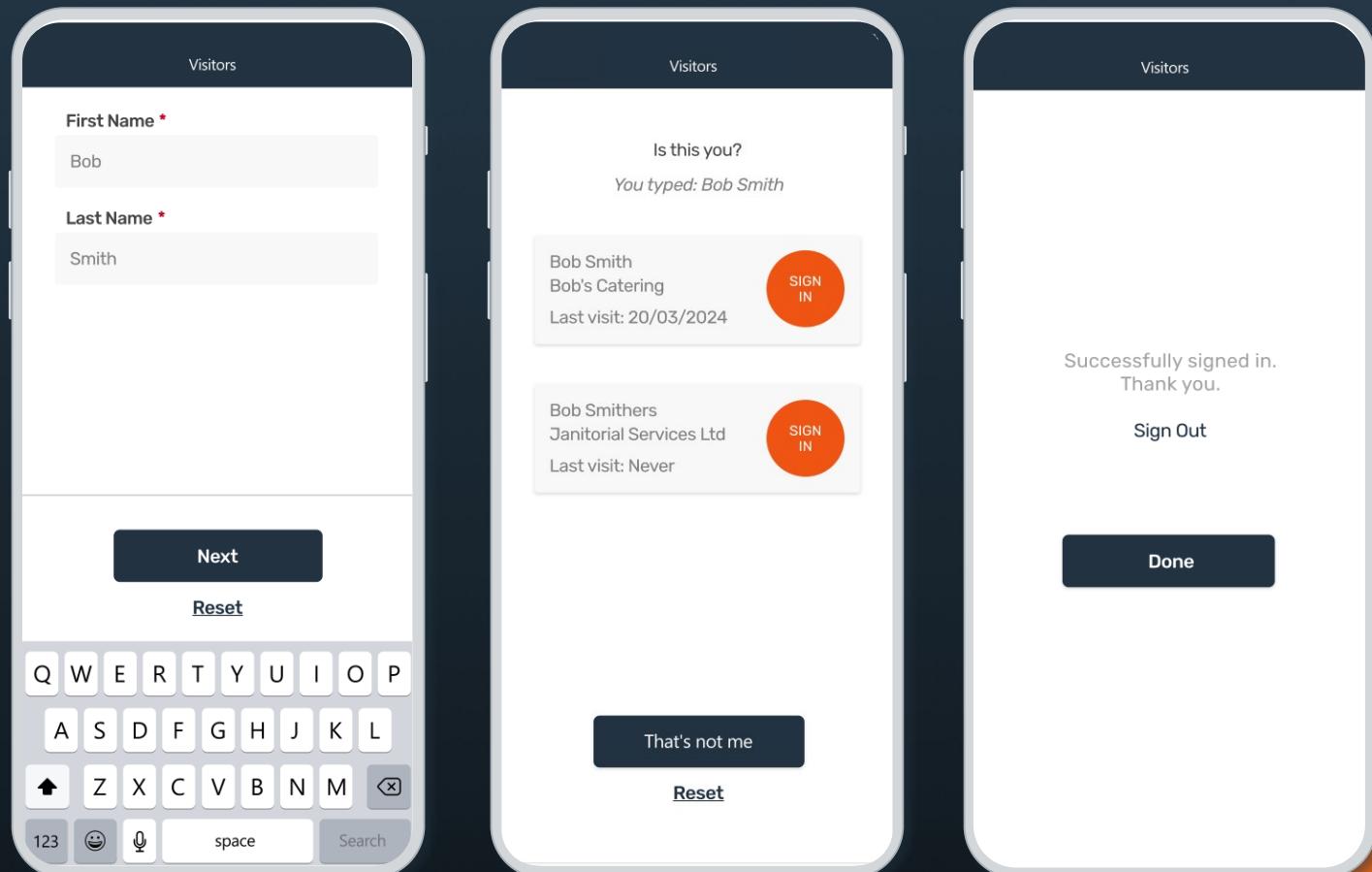
Existing Visitor Profile.

The below steps show the process for signing in a visitor with an **existing profile**.

- Type in worker name and click, “**Next**”
- **If profile is found**, select “**Sign in**”. If multiple potential matches found, select the **relevant profile**
- If the **desired profile** is displayed, click  and select **Done** to complete the process

If the desired profile **does not appear**:

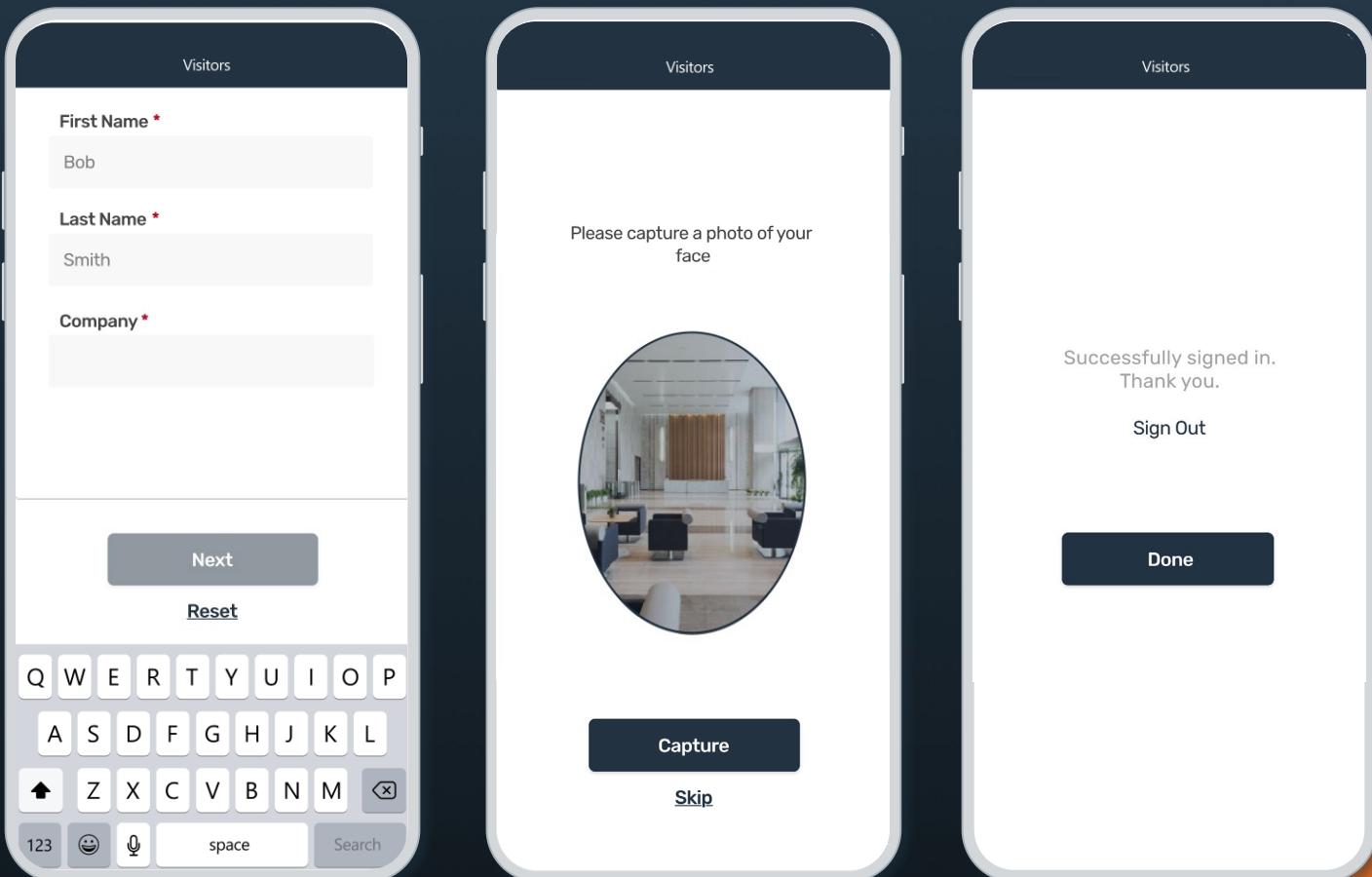
- Select “**That's not Me**”
- You will then be required to enter the **company name & create a profile**
- When the **new profile** is displayed, click  and select, **“Done”** to complete the process



New Visitor Profile.

The below steps show the process for signing in a visitor who **does not have an existing profile**. This will enable access to site by just using the **Supervisor App**.

- Type in worker name and click, **Next**
- As no profile will be found, you are then then prompted to enter their **Company Name** and click, **Next**
- Then, you will be prompted to capture a photo of your face
- Click, **Capture** to take the photo, then **OK** to confirm
- Or select, **Skip** if not photo is required
- Once you have **confirmed** the photo or selected to **skip**, you will be **signed in** and can then click, **Done**



FAQ's

Q. How long does a Visitor Card profile stay assigned to a site visitors profile?

A. Cards and sites are automatically un-associated from site visitors' profiles at the end of each day.

Q. Can we create more card profiles?

A. You can create additional card profiles through the “**add worker**” option on the dashboard and selecting the “**Assignable as Visitor Card**” option. This will allow you to then print a card for this card profile.

Q. How do we print additional / replacement cards?

A. Once the printer has been configured and set up, search for the Card Profile that you would like to print the card for. From the taskbar on the left, scroll to “**Print Card**” and follow the instructions. Further information for printing cards can be found on the **MSite Training Hub**.

Q. What User Role/Permission is required to manually add Visitors to the system?

A. Visitor – Add/Edit.

Q. How many Visitor profiles are created when a new site is created?

A. This is controlled by a setting within MSite.



Be safe. Be productive. Be one.