

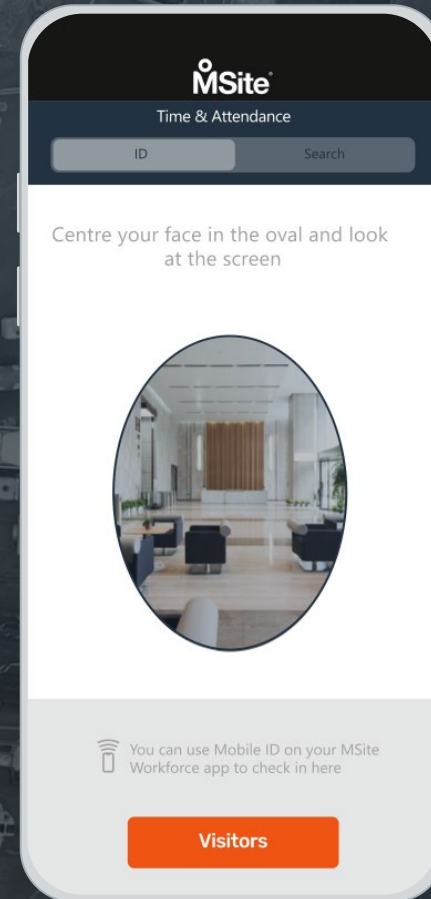


Training Hub

# Visitor Management.

Welcome to the MSite Academy.

This course will go through how to use the MSite Visitor Management system.

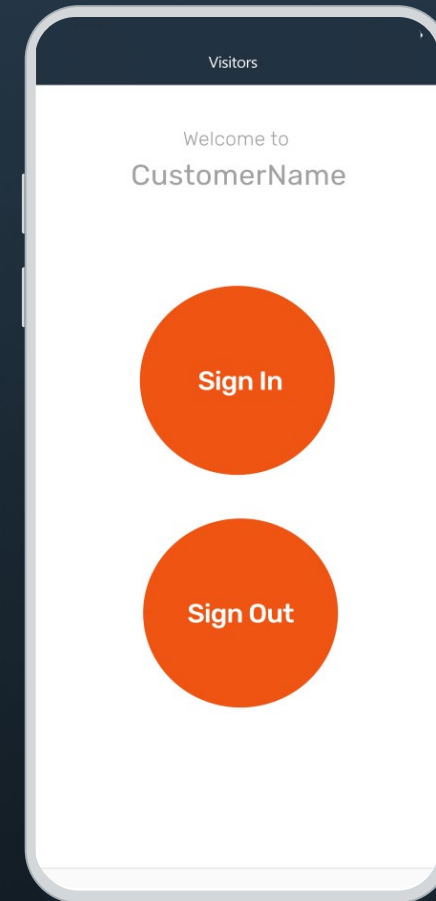


# Visitor Management.

This guide will go through the steps of the **Visitor Management** system. 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
- Inviting a Visitor via Pre-registration
- Visitors Signing In/Out on the Supervisor App





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Module 1:

# 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**

The screenshot shows the 'Add a New Visitor' form in the MSite dashboard. The left sidebar contains a menu with options like Dashboards, Contractors, Workers, Add New Worker, Add New Visitor (highlighted), Import Worker from CSCS, Pre-Registration, Labour Hours, Requisitioning, Access, Safety, Sustainability, Deliveries, Alerts & Notifications, Reports, System, and Support. The main form area has a title 'Add a New Visitor' and a warning message: 'Stop! Do you really need to add this profile? Please consider sending an invitation for online induction instead.' The form is divided into sections: 'Personal Details' with fields for First Name, Last Name, Assignable as Visitor Card (No), Visitor Card (Temporary) (Please Select), and Visitor Card Number; a profile picture section with 'Upload', 'Capture', and 'Scan' options, and a 'Use face biometrics' checkbox; 'Fit for Role' with a 'Fit for Role' button, a 'Not Checked' status, and a 'Fit for Role - Certificate' section; and 'Manage Site Association' with a 'View History' button and 'Add Site Group' and 'Add Site' buttons. The footer shows '© Copyright 2025 msite.com'.



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Module 2:

# 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.

The screenshot shows the MSite 'Invite New Visitors' interface. On the left is a sidebar menu with options: Dashboards, Contractors, Workers, Pre-Registration, Invitations, Online Inductions, On-Site Inductions, ID Checks, Access, Safety, and Sustainability. The 'Invitations' section is expanded, and 'Invite New Visitors' is highlighted. The main content area is titled 'Invite New Visitors' and has two tabs: 'Individual' and 'Bulk'. The 'Individual' tab is active, showing fields for 'First Name' (Joe), 'Last Name' (Bloggs), 'Email Address' (Joe.Bloggs@gmail.com), and 'Mobile Number'. A 'Send' button is at the bottom right. The 'Bulk' tab is also visible, showing a 'Recipients' section with a text area for 'Enter one email address per line' and another 'Send' button.

The screenshot shows a modal dialog titled 'Invite Joe Bloggs'. It has a close button (X) in the top right corner. The dialog is divided into sections: 'Update Profile', 'Update Training', and 'Company Wide'. Under 'Update Profile', there are three sub-sections: 'Personal Details' with a 'Project/Site' dropdown menu (showing 'Dublin'), 'Accreditations', and 'ID Checks'. The 'Update Training' section has a checkbox that is checked. The 'Company Wide' section has a checkbox that is checked, with a description: 'Prepare invited Worker(s) for training that is mandatory for their role and occupation, regardless of project/site. Site Specific Training and Welcome Meetings can be organised at a later date.' Below this is the 'Site Specific' section with a description: 'Prepare invited Worker(s) for work on a chosen site. This will automatically include any applicable Company Wide Training if they have not already completed it.'



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Module 3:

# Adding Visitors - Supervisor App.

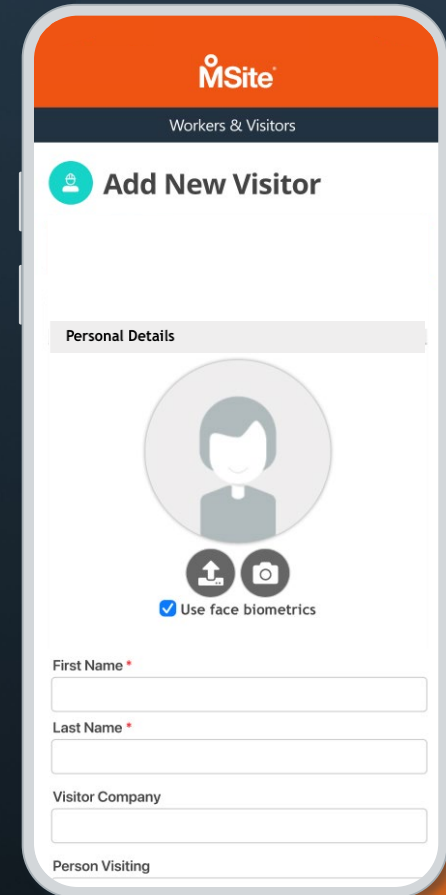
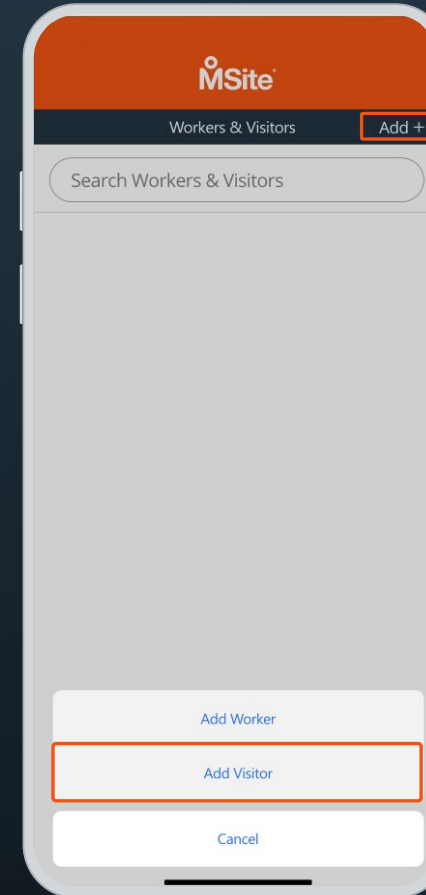
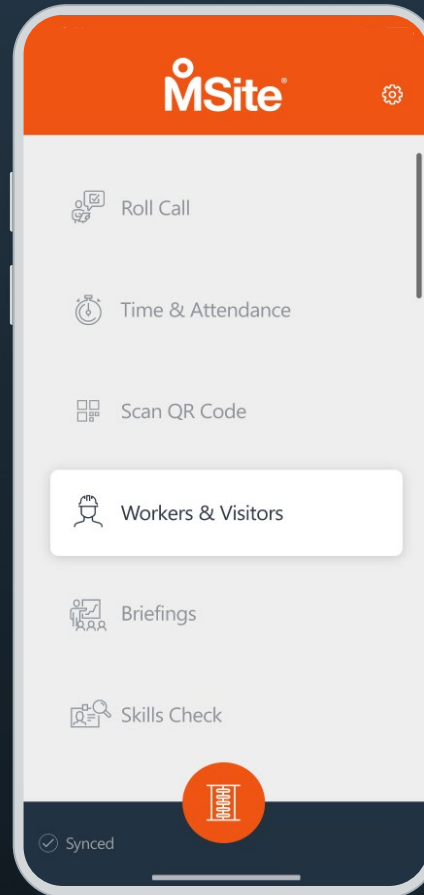


# Adding Visitors - Supervisor App.

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**
- Now complete their profile & select, **Save**

The visitor will now be able to go through the sign in process.







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Module 4:

# Signing In Visitors - Supervisor App.

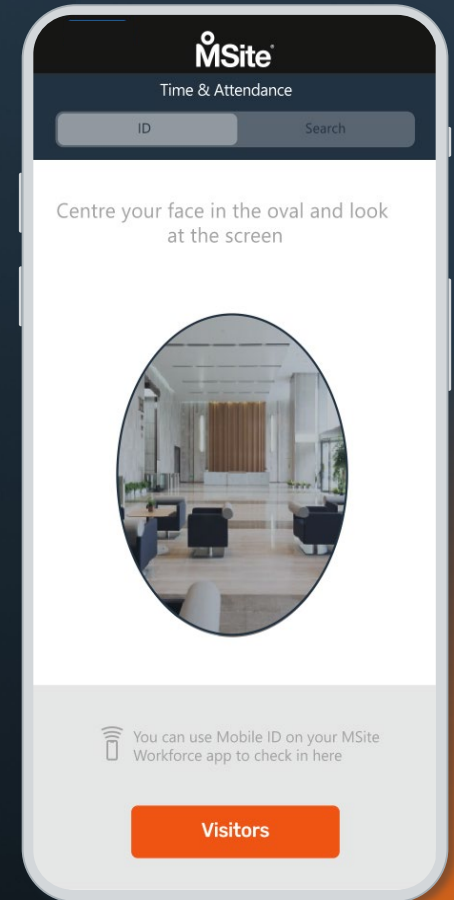
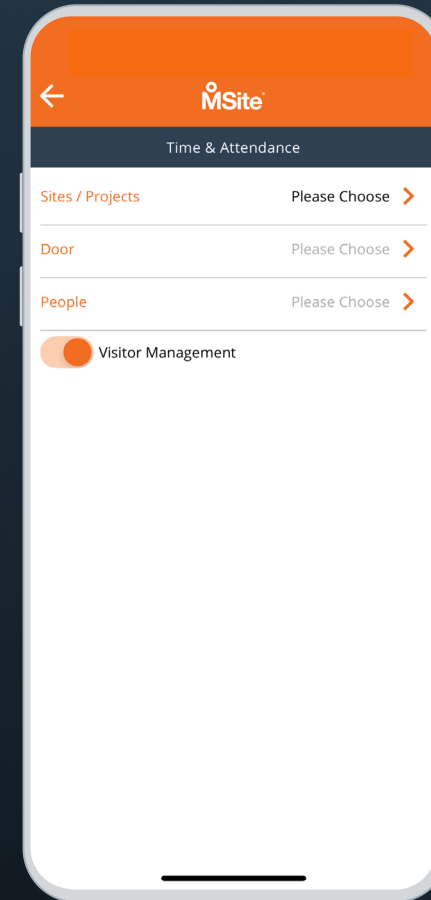
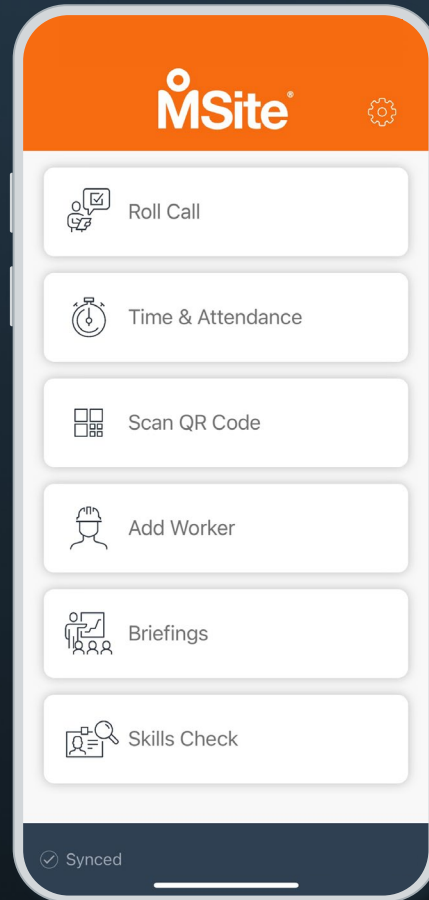
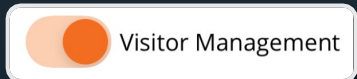


# Signing In Visitors - Supervisor App.

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.

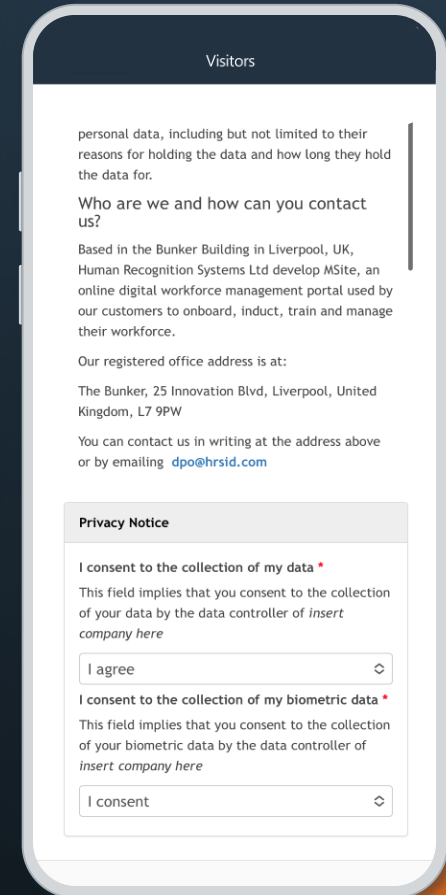
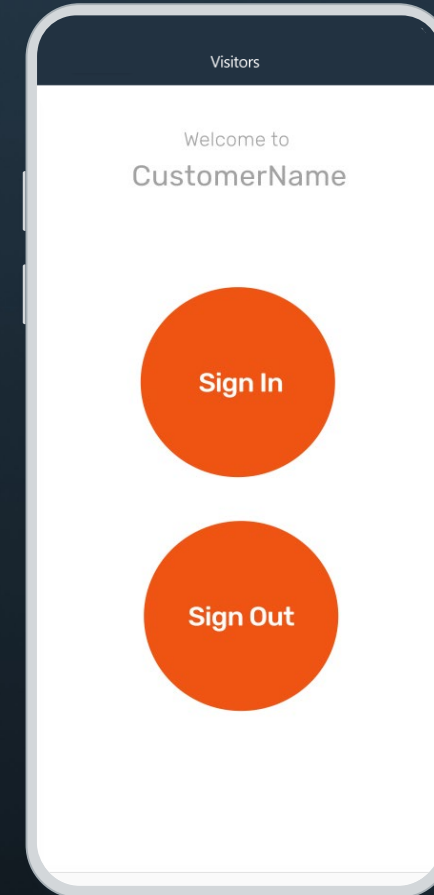
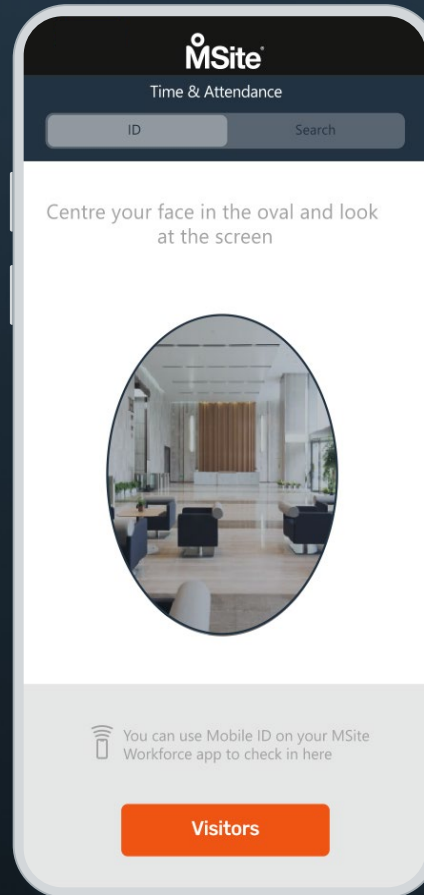


# Visitor Signing In Process.

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**




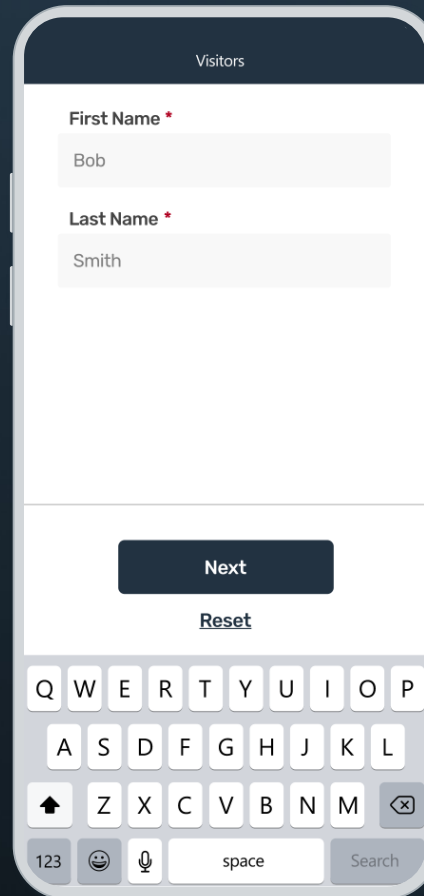
# Existing Visitor Profile.

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



Visitors

First Name \*

Bob

Last Name \*

Smith

Next

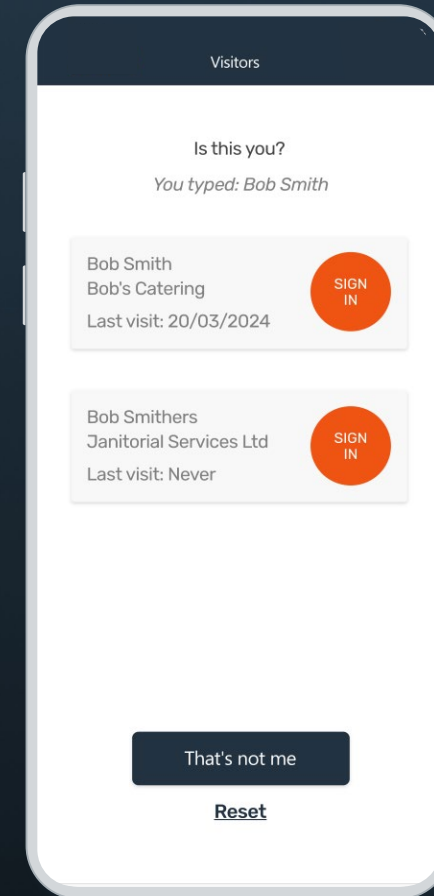
[Reset](#)

Q W E R T Y U I O P

A S D F G H J K L

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123 😊 🎤 space Search




Visitors


Is this you?

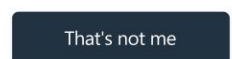
You typed: Bob Smith

Bob Smith  
Bob's Catering  
Last visit: 20/03/2024

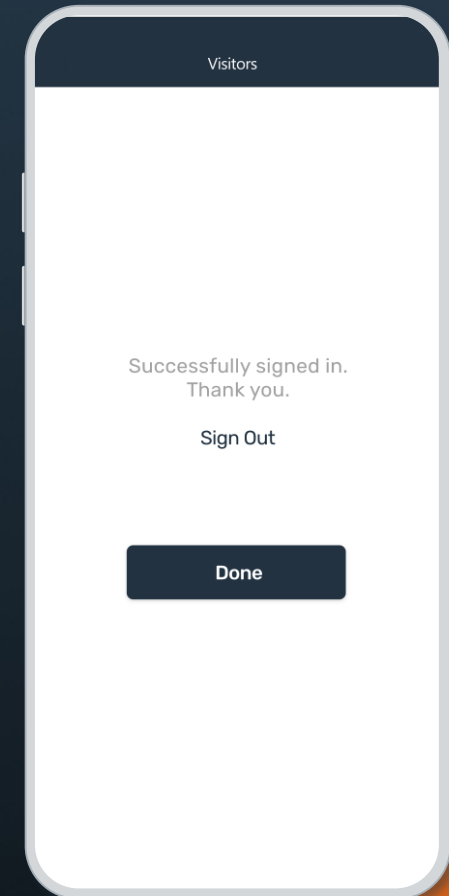


Bob Smithers  
Janitorial Services Ltd  
Last visit: Never






[Reset](#)



Visitors

Successfully signed in.  
Thank you.

Sign Out

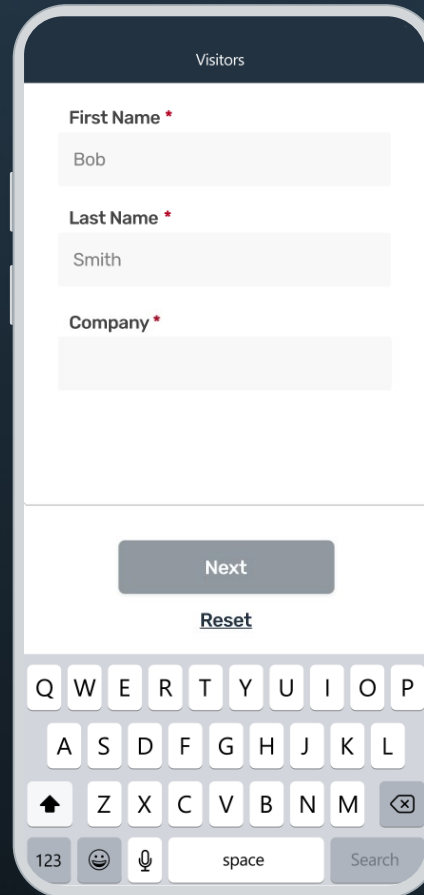




# New Visitor Profile.

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**



Visitors

First Name \*

Bob

Last Name \*

Smith

Company \*

Next

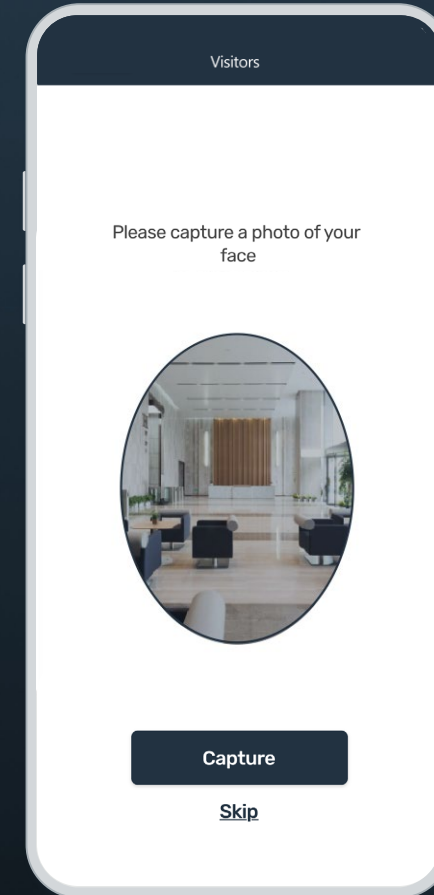
[Reset](#)

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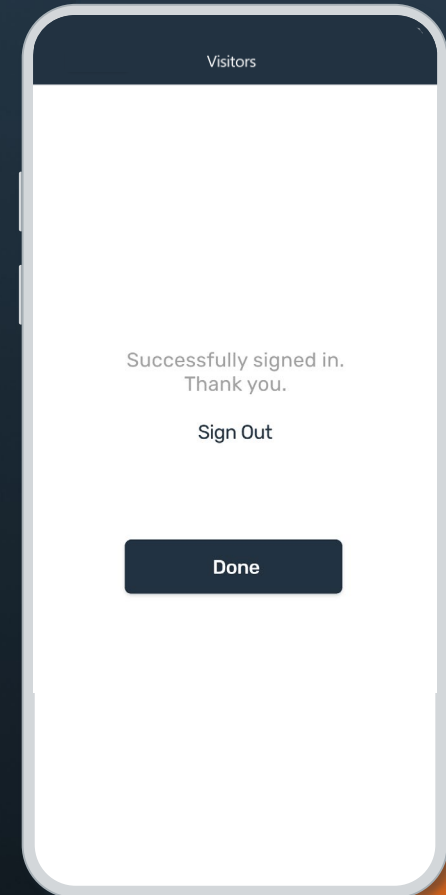
Visitors

Please capture a photo of your face



Capture

[Skip](#)



Visitors

Successfully signed in.  
Thank you.

Sign Out

Done

# FAQ's

**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.**