

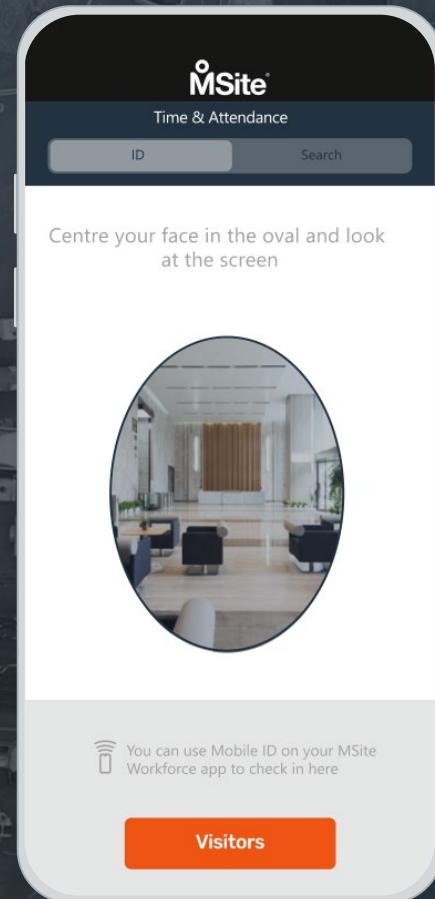


Training Hub

Visitor Management.

Welcome to the MSite Academy.

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

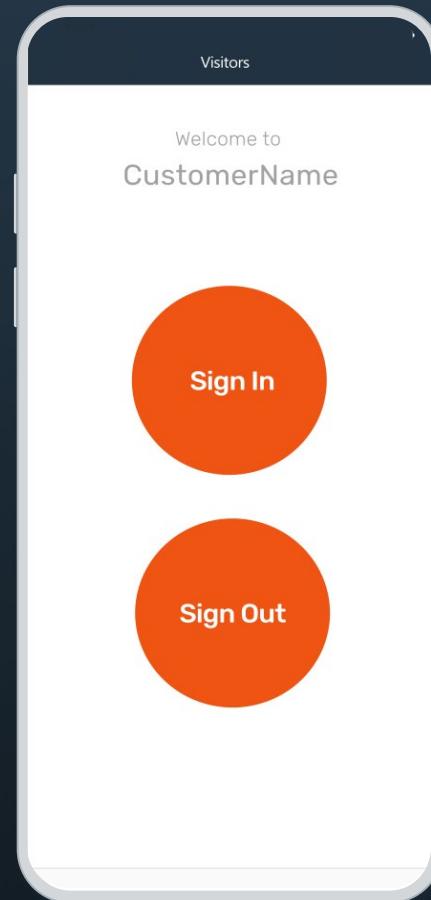


Visitor Management.

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



Module 1:

Adding Visitors Manually.



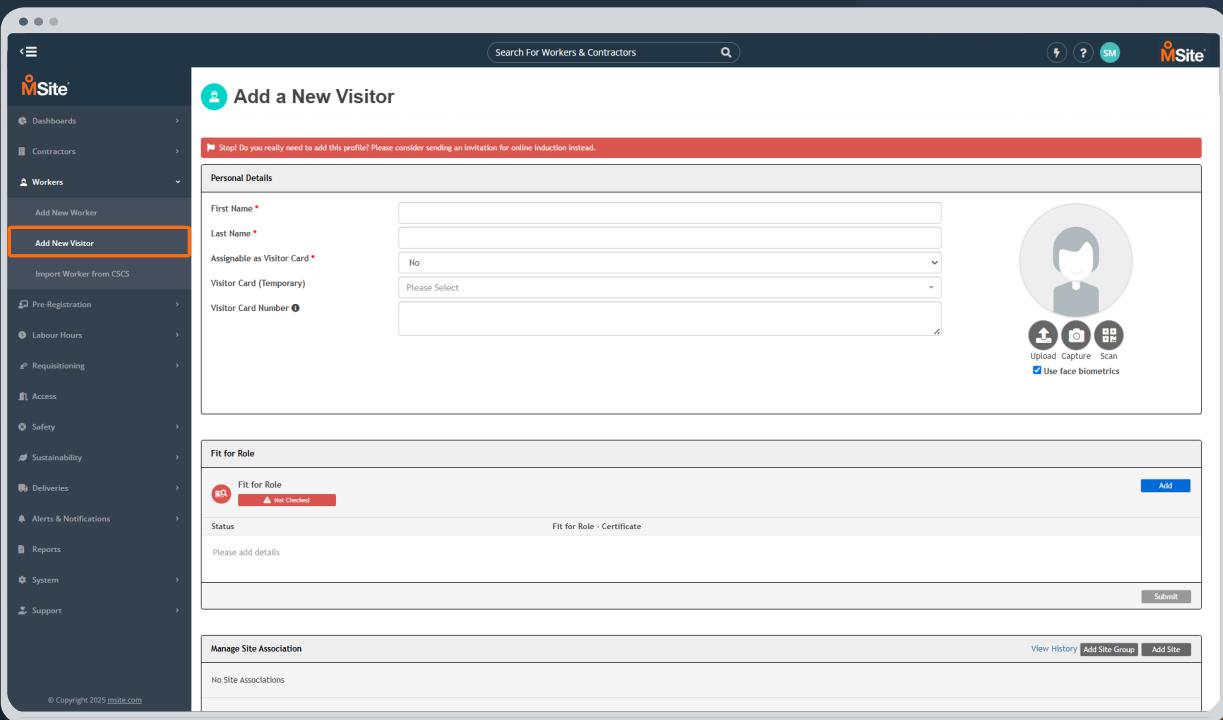
Adding Visitors Manually.

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 MSite Dashboard interface. The left sidebar has a dark theme with white icons and text. The 'Workers' section is expanded, and the 'Add New Visitor' option is highlighted with an orange box. The main content area is titled 'Add a New Visitor'. It contains a red banner asking if the user really needs to add this profile, with a link to consider an online induction instead. The 'Personal Details' section requires 'First Name' and 'Last Name'. The 'Assignable as Visitor Card' field is set to 'No'. The 'Visitor Card (Temporary)' field is set to 'Please Select'. The 'Visitor Card Number' field is empty. The 'Fit for Role' section shows a status of 'Not Checked'. The 'Manage Site Association' section shows 'No Site Associations'. On the right, there is a sidebar with a user profile icon and buttons for 'Upload', 'Capture', 'Scan', and 'Use face biometrics'.

Module 2:

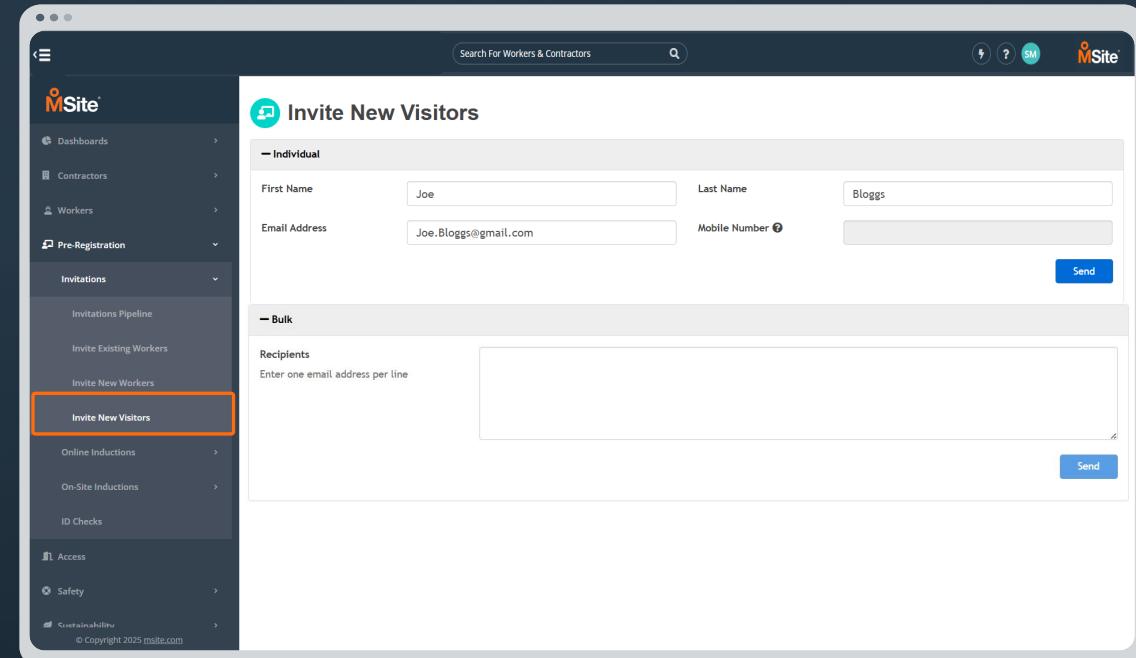
Inviting Visitors - Pre-Registration.



Inviting Visitors - Pre-Registration

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

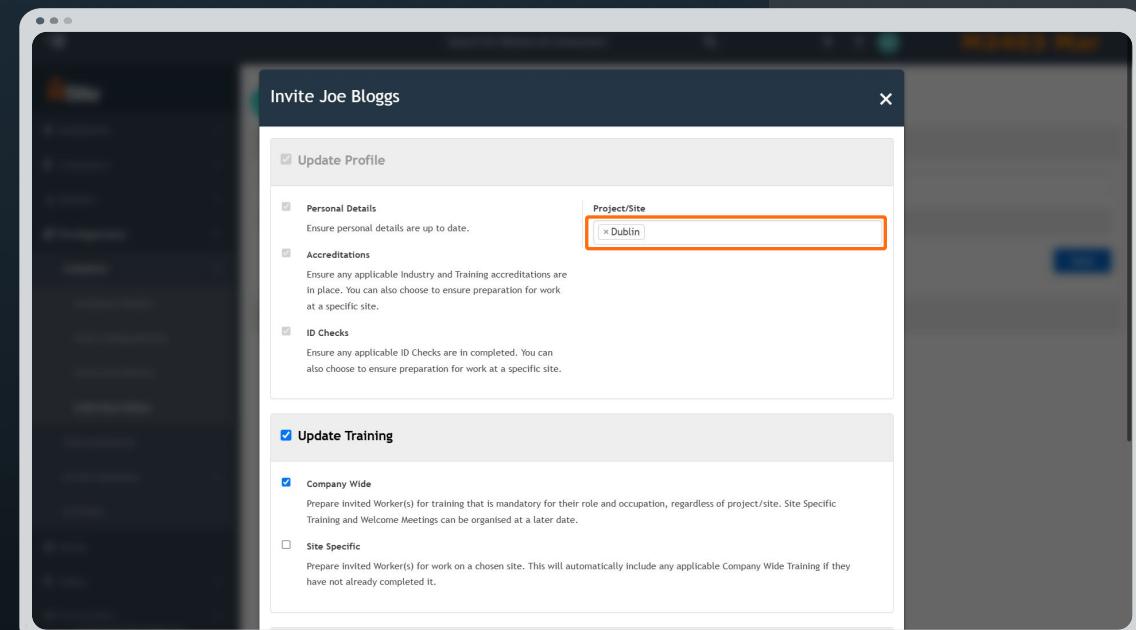
Pre-registration  **Invite New Visitors**  **Enter the Visitor Information**



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.



Module 3:

Adding Visitors - Supervisor App.

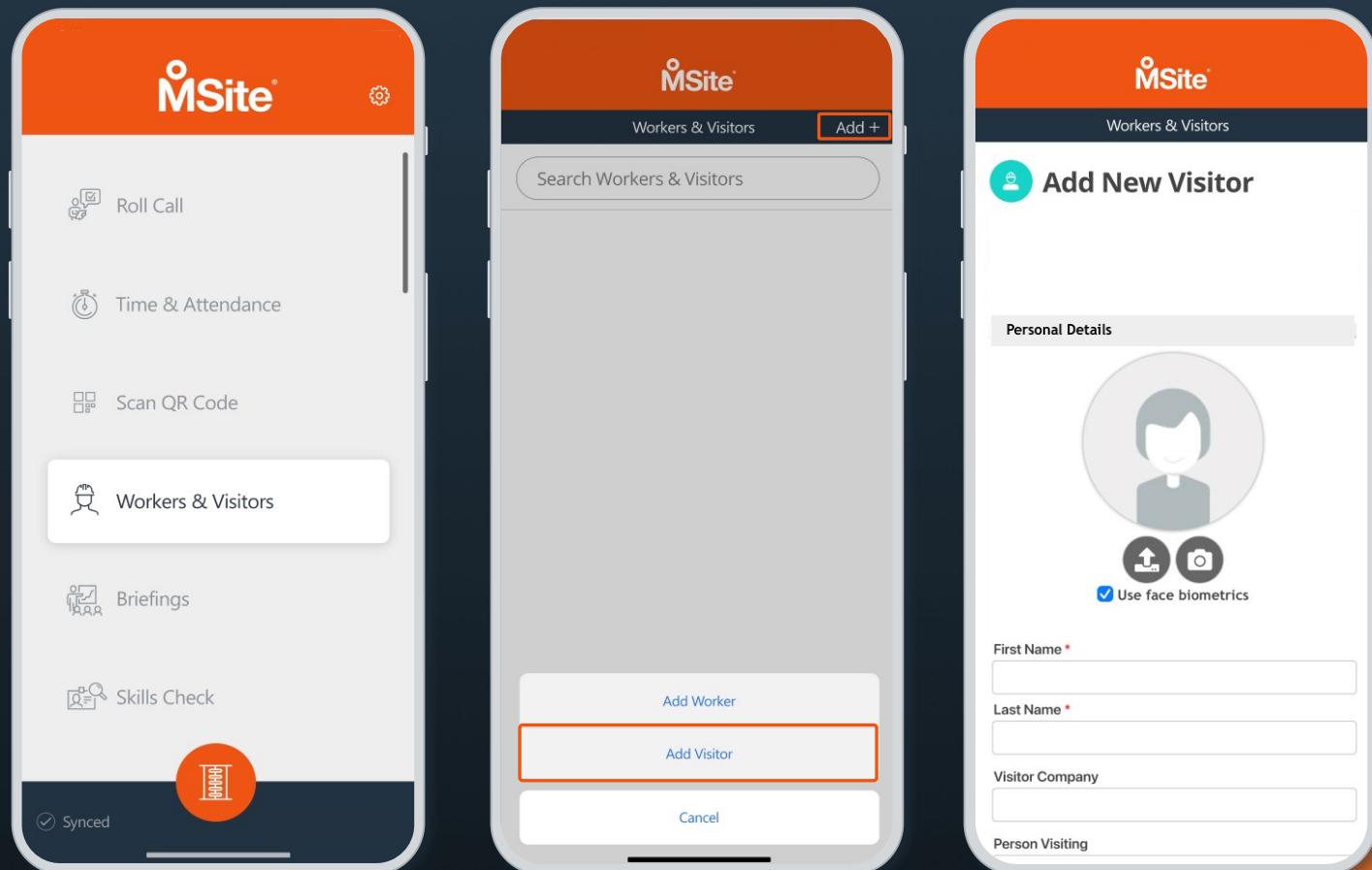


Adding Visitors - Supervisor App.

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**

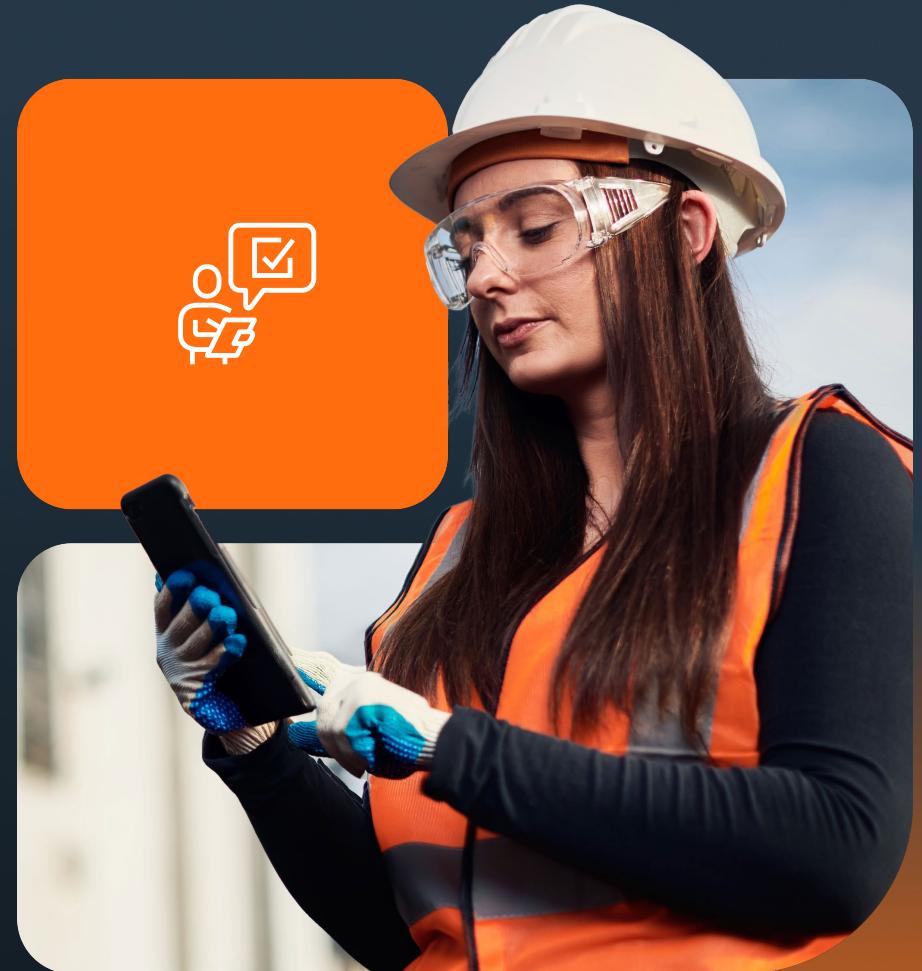
The visitor will now be able to go through the sign in process.



Module 4:

Signing In Visitors

- Supervisor App.

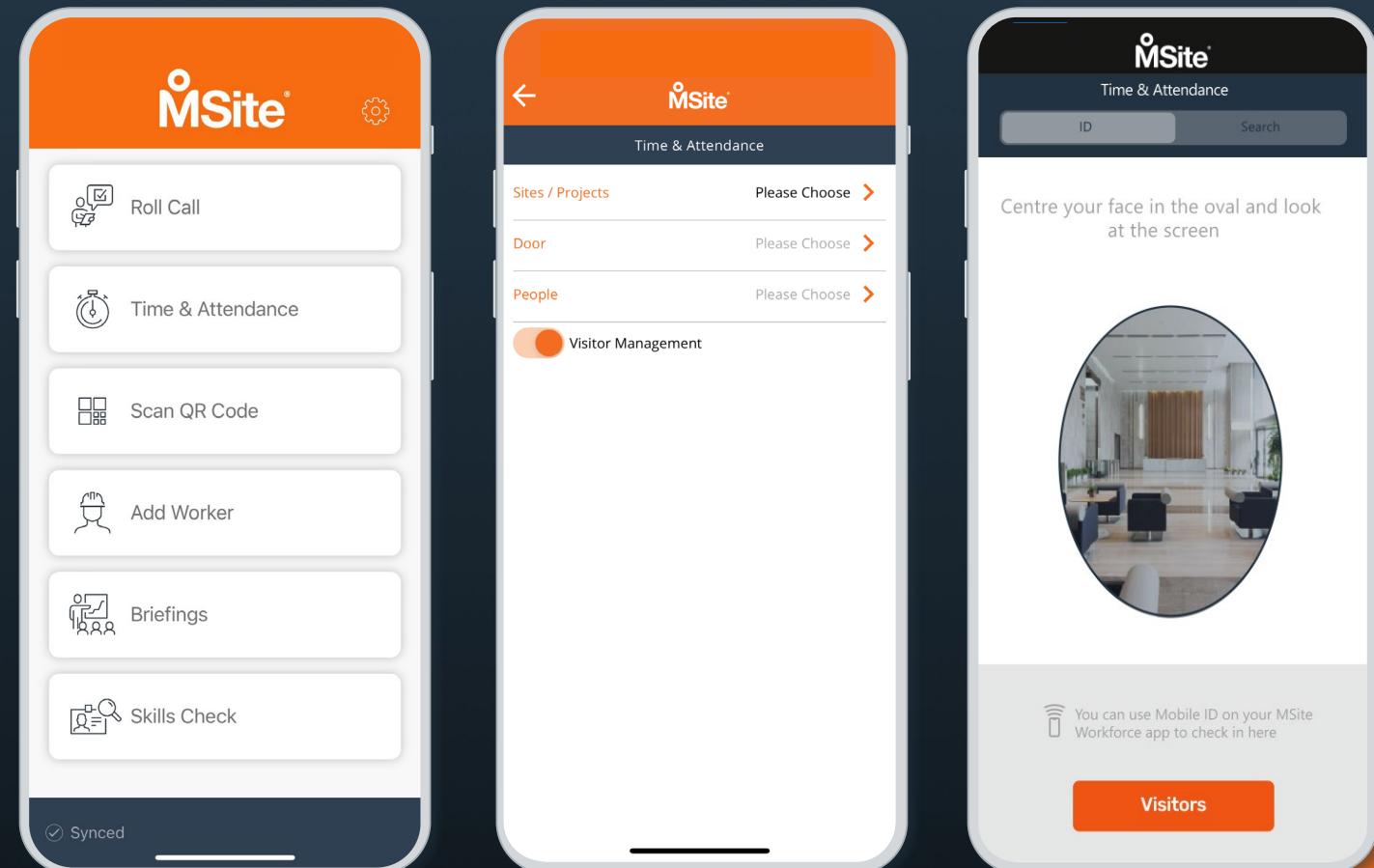
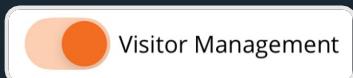


Signing In Visitors - Supervisor App.

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.

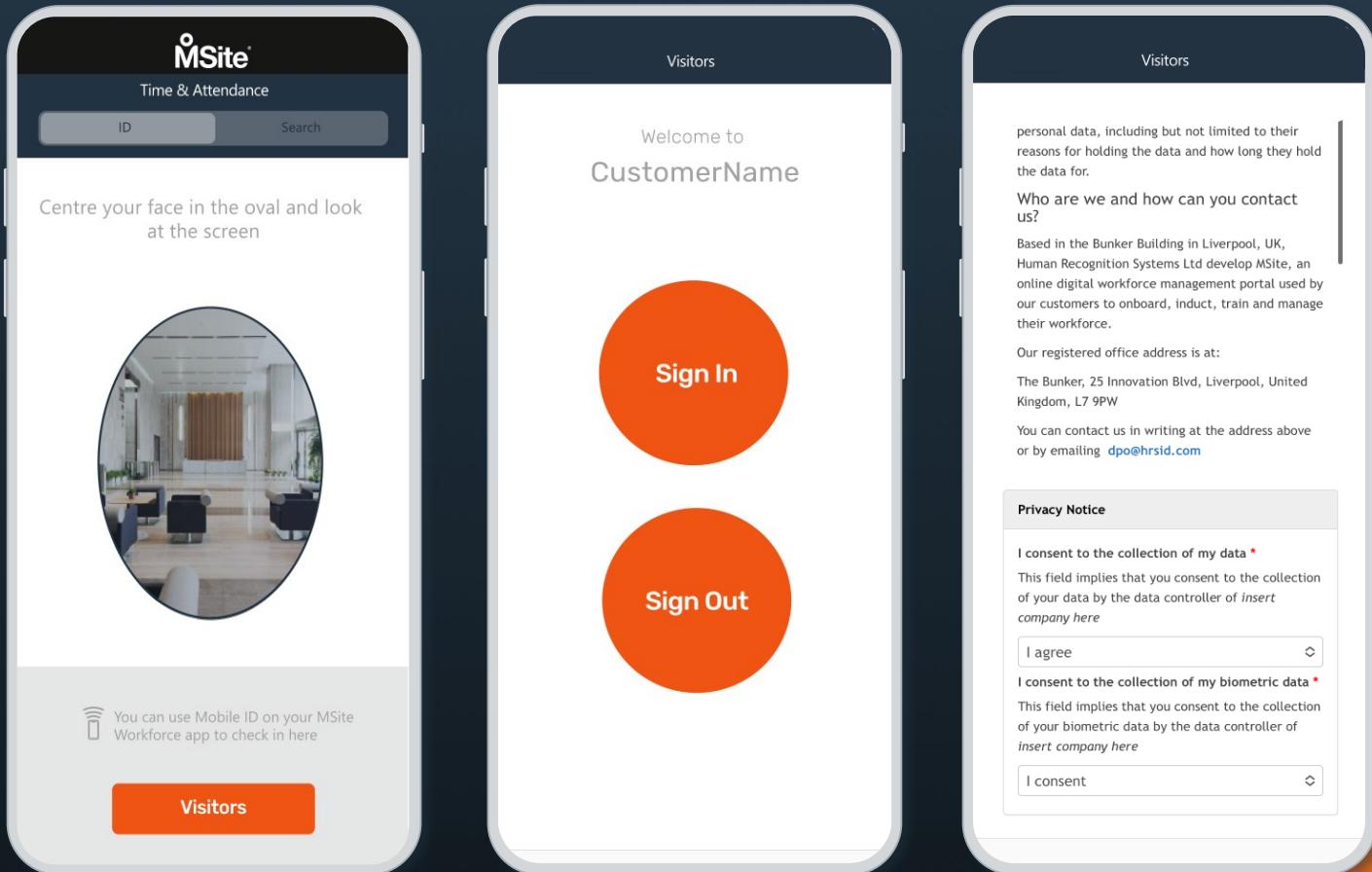


Visitor Signing In Process.

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**



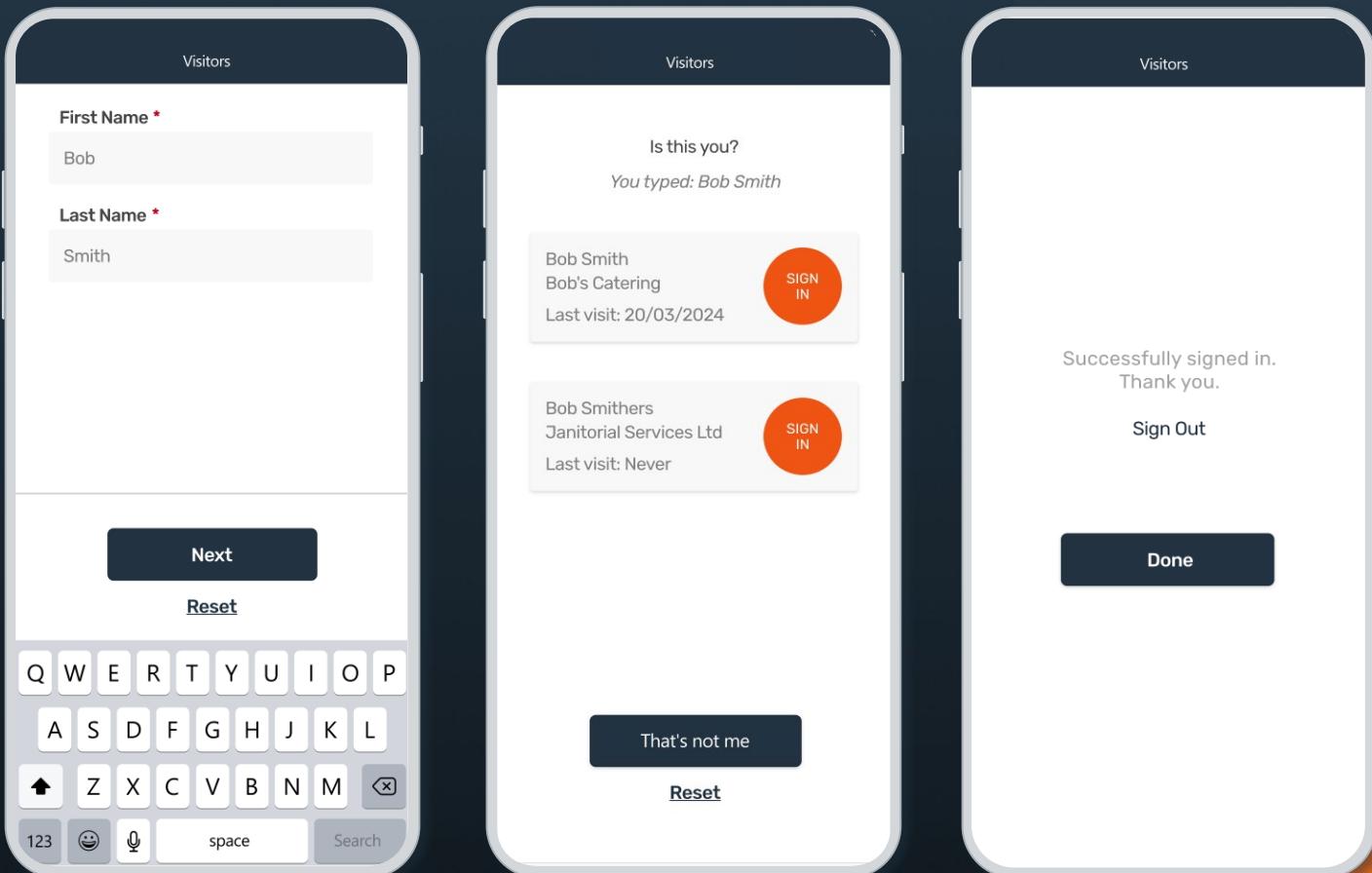
Existing Visitor Profile.

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**:

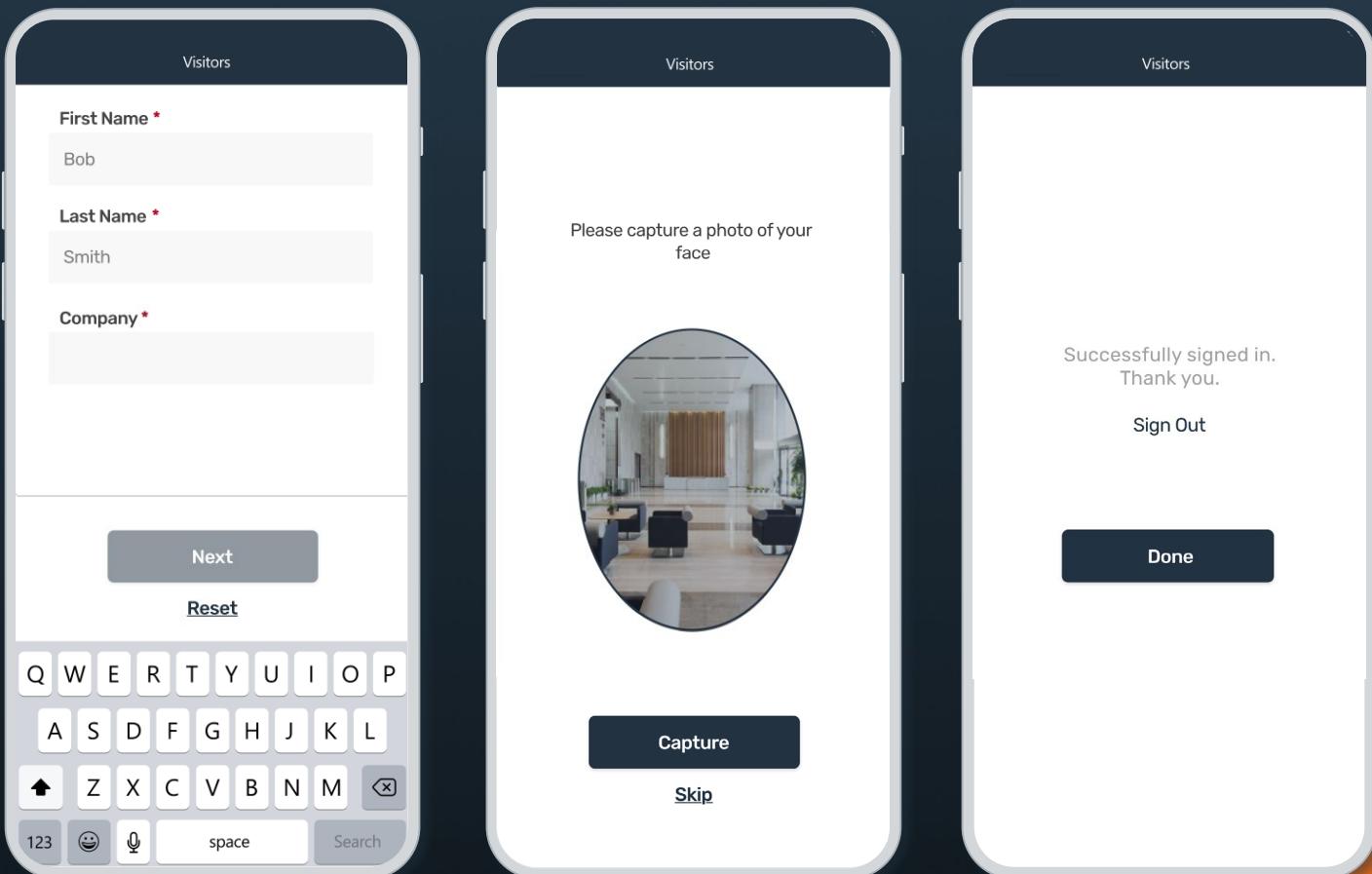
- Select “**That's not Me**”
- You will then be required to enter the **company name & create a profile**
- When the **new profile** is displayed, click  and select, “**Done**” to complete the process



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. 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.