

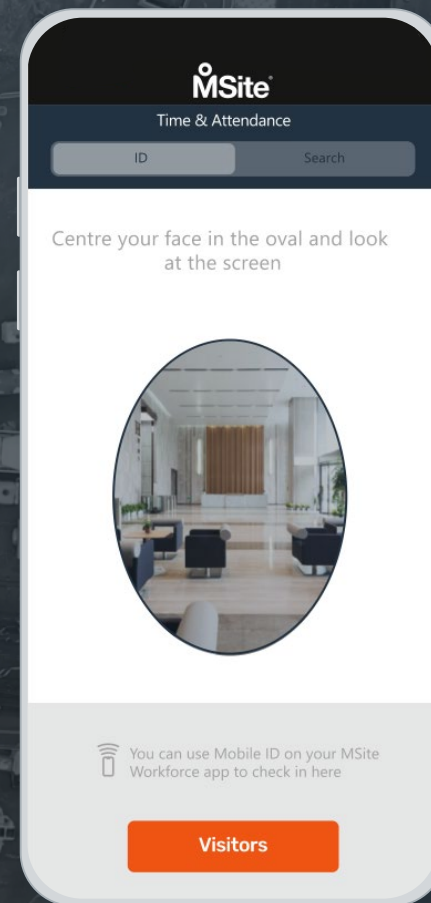


Training Hub

# Visitor Management.

Welcome to the MSite Training Hub.

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

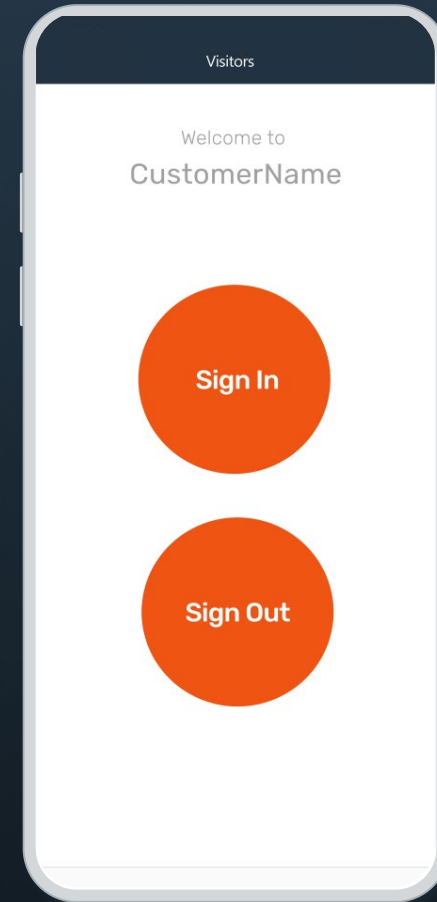


# Visitor Management.

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:

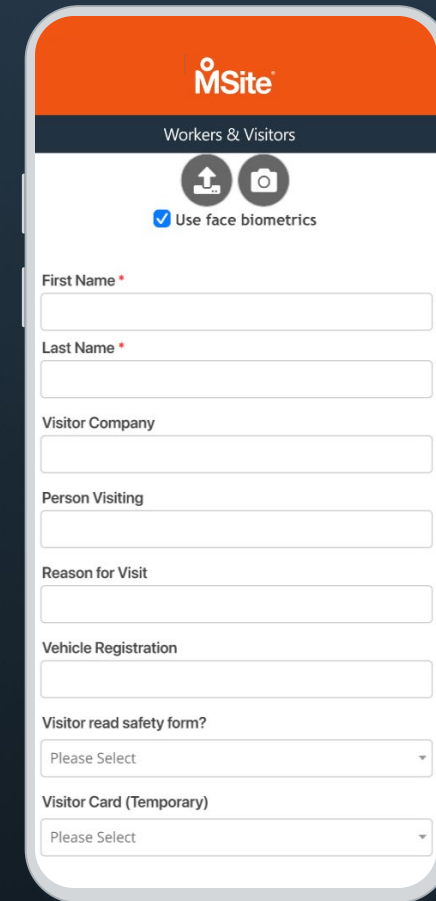
- Adding a Visitor Manually
- Adding a Visitor on the Supervisor App
- Creating additional Visitor Cards and Profiles
- FAQ's



# 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 MSite. The top header is orange with the MSite logo. Below it is a dark blue bar with the text "Workers & Visitors". There are two circular icons: one with an upward arrow and another with a camera icon. Below these icons is a checkbox labeled "Use face biometrics" which is checked. The main form area is white and contains several input fields and dropdown menus. The fields are labeled: "First Name \*", "Last Name \*", "Visitor Company", "Person Visiting", "Reason for Visit", "Vehicle Registration", "Visitor read safety form?", and "Visitor Card (Temporary)". Each field has a corresponding input box or dropdown menu.





Training Hub

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 'Add a New Visitor' form in the MSite application. The left sidebar contains a menu with options like Dashboards, Contractors, Workers, Add New Worker, Import Worker from OHS, Pre-Registration, Labour Hours, Requisitioning, Access, Safety, Sustainability, Deliveries, Alerts & Notifications, Reports, System, and Support. The 'Add New Visitor' option is highlighted. The main form area has a title 'Add a New Visitor' and a search bar. Below the title is a red warning banner: '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 (Visitor), Last Name (11), Assignable as Visitor Card (Yes), Visitor Card (Temporary) (Please Select), and Visitor Card Number (11); '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 bottom of the form shows 'No Site Associations'.

# 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 displays the MSite web application interface. On the left is a sidebar menu 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 the 'Visitor One' profile. A 'Site Association' modal is open, allowing selection of a site (Site 01 - Liverpool), mode of transport (Car - Petrol), lodgings postcode, induction date (01/05/2025), and induction status (Yes). It also includes checkboxes for Contractor (Visitor), Trade, and Role (Not Stated), along with an induction number field. An 'Access Rights' section shows 'Liverpool' with a checked checkbox. The modal has 'Cancel' and 'Add' buttons. The background profile page shows fields for Personal Details, Status, and Site Association, with a search bar at the top containing 'visitor one'.



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Module 2:

# Adding Visitors Manually.



# Adding Visitors Manually.

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

- **Workers** ➡ **Add New Visitor**
- **First Name**
- **Last Name**
- **Choose which Visitor Card you wish to assign to that individual**
- **Save**

**Please Note:** Once the visitor profile is saved, this new process will populate the **Contractor** and **Role** fields automatically as **Visitors**.

The screenshot shows the MSite 'Add a New Visitor' interface. On the left is a dark sidebar with a menu including 'Dashboards', 'Contractors', 'Workers' (with a sub-menu containing 'Add New Worker' and 'Add New Visitor'), 'Pre-Registration', 'Labour Hours', 'Requisitioning', 'Access', 'Briefings', 'RAMS', 'Safety', 'Sustainability', 'Deliveries', and 'Alerts & Notifications'. The main content area is titled 'Add a New Visitor' and features a red warning banner at the top: 'Stop! Do you really need to add this profile? Please consider sending an invitation for online induction instead.' Below this is the 'Personal Details' section with fields for 'First Name', 'Last Name', and 'Assignable as Visitor Card' (set to 'No'). The 'Visitor Card (Temporary)' field is highlighted with an orange border and shows a dropdown menu with 'Visitor Two (Bio Id: 2622)' selected. To the right of these fields is a circular profile picture placeholder and three icons: 'Upload', 'Capture', and 'Scan', with a checked box for 'Use face biometrics'. Below the personal details is the 'Site Association' section, which is currently empty, showing 'No Site Associations' and 'No Site Groups'. At the bottom, there is a section for 'CSCS Cards and Affiliated Card Schemes' with an 'Add' button. The top of the interface includes a search bar for 'Workers & Contractors' and user profile icons.





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Module 3:

# Inviting Visitors - Pre-Registration.



# Inviting Visitors - Pre-Registration

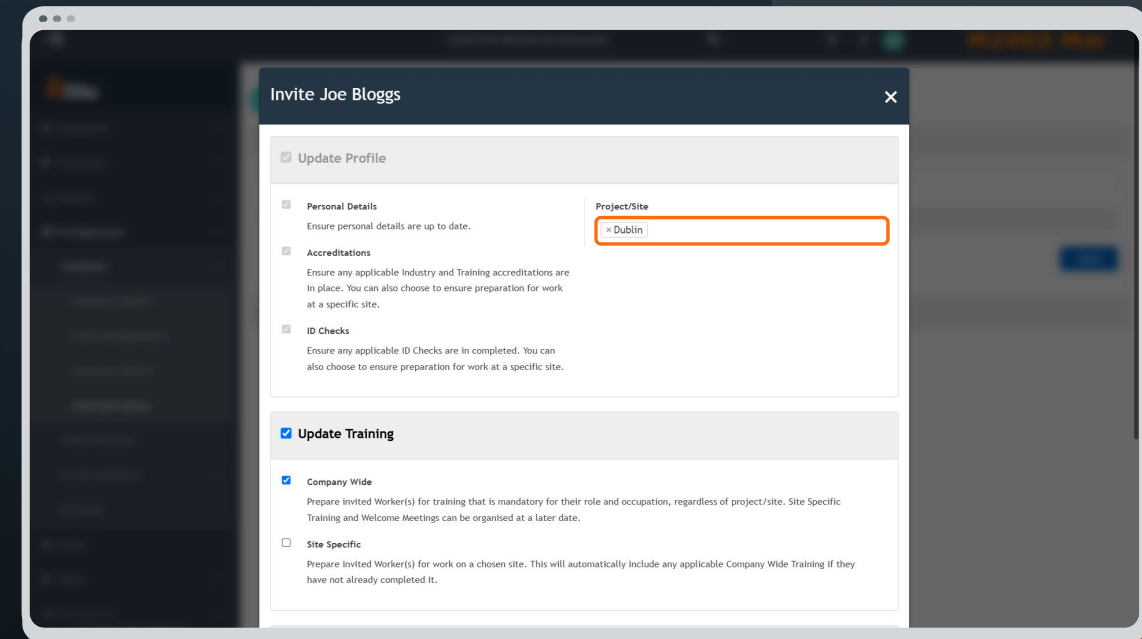
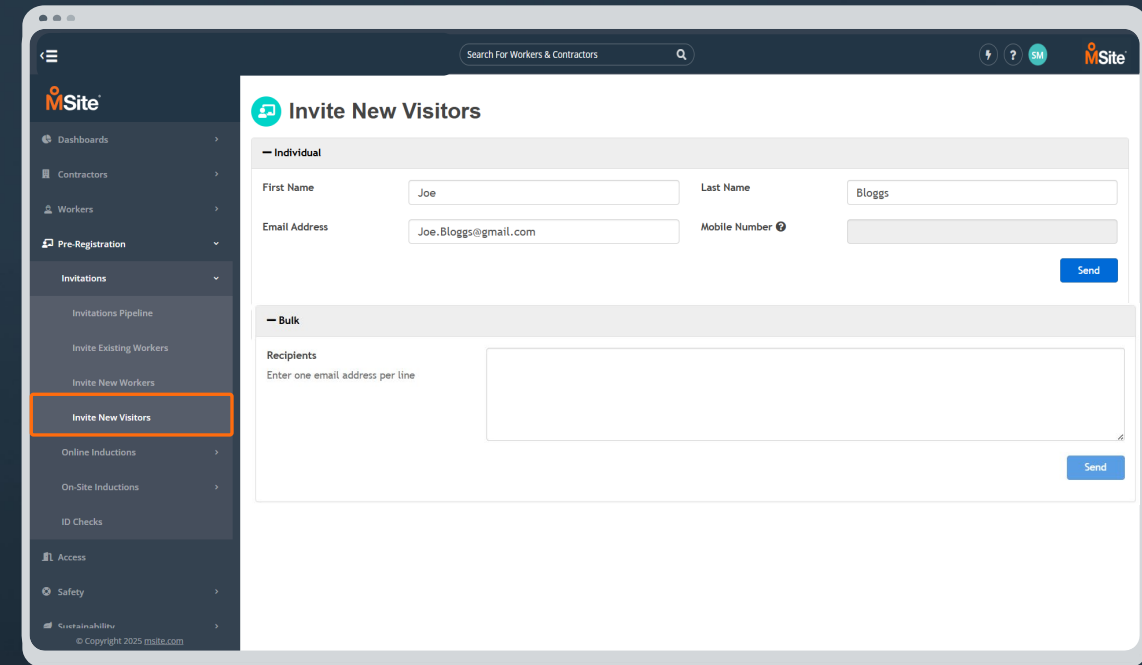
Inviting via **Pre-Registration** enables the visitor to be granted **access to site** prior to arrival.

**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.





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Module 4:

# Adding Visitors - Supervisor App.

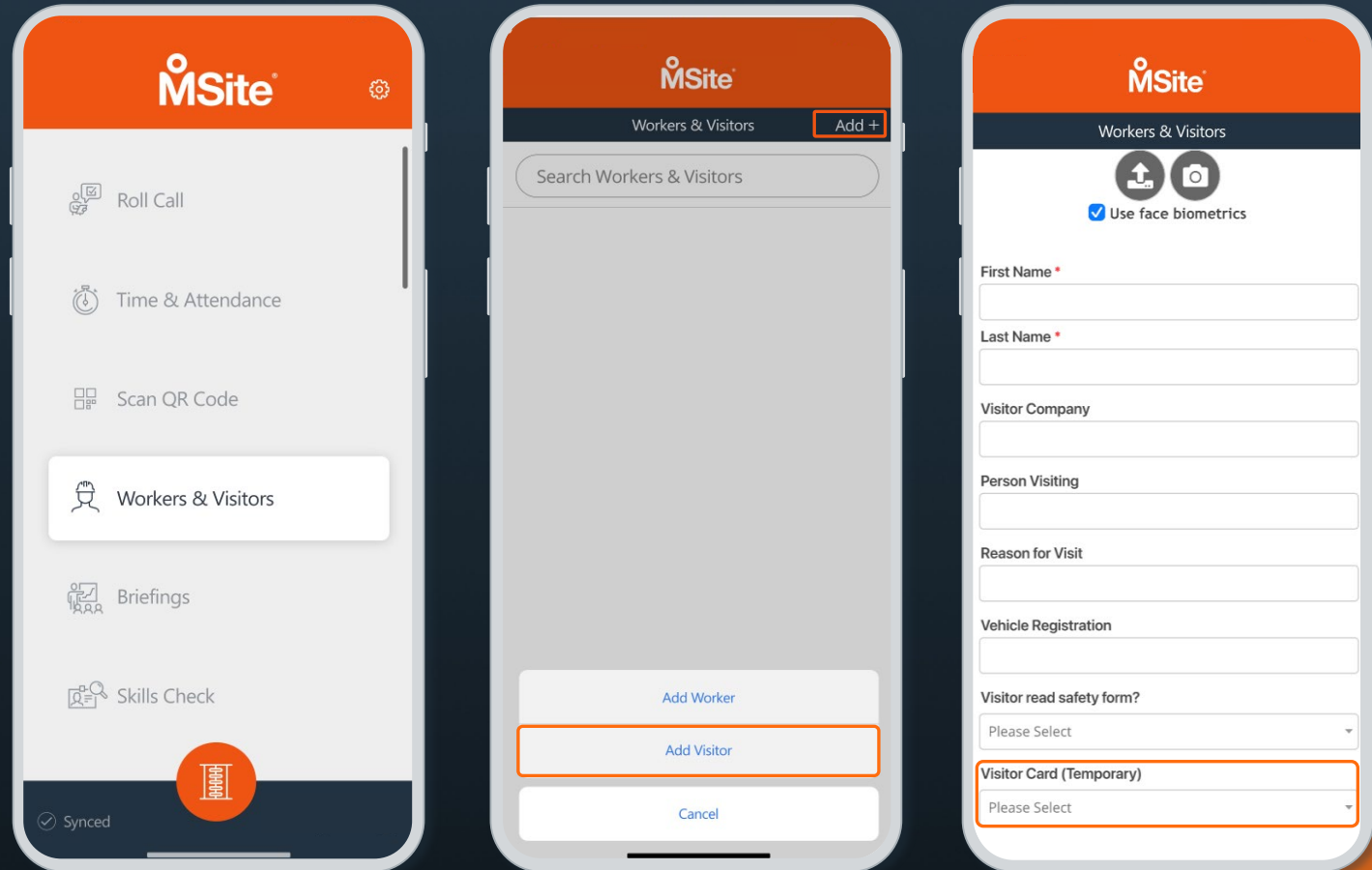


# Adding Visitors - Supervisor App.

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.







Training Hub

Module 5:

# Sign In Visitors - Supervisor App.

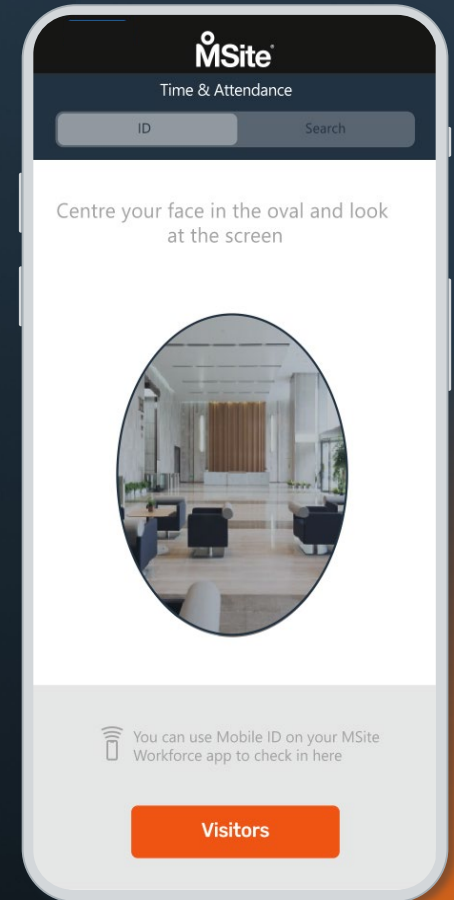
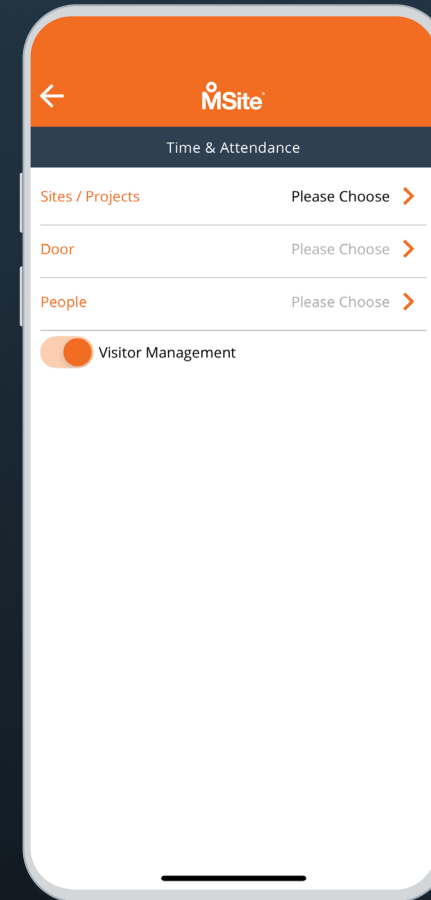
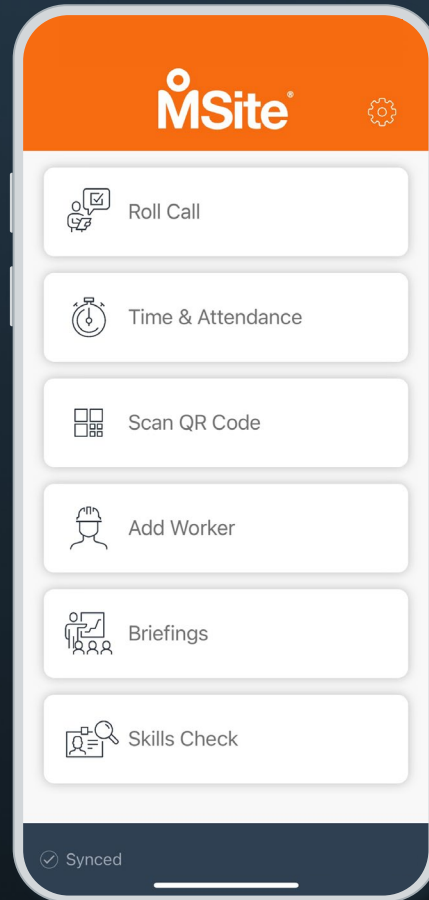


# Signing In Visitors - Supervisor App.

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.

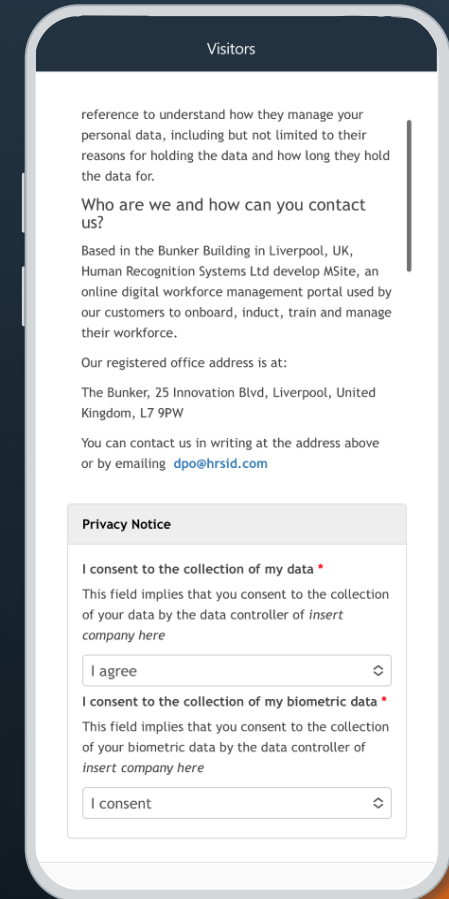
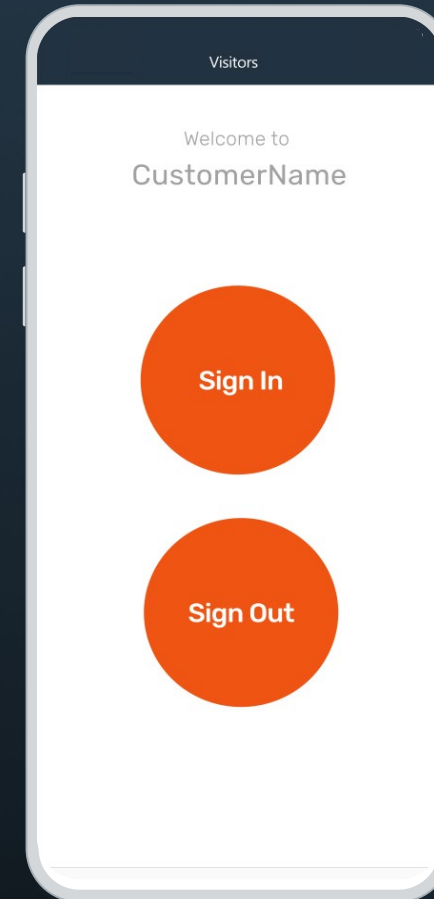
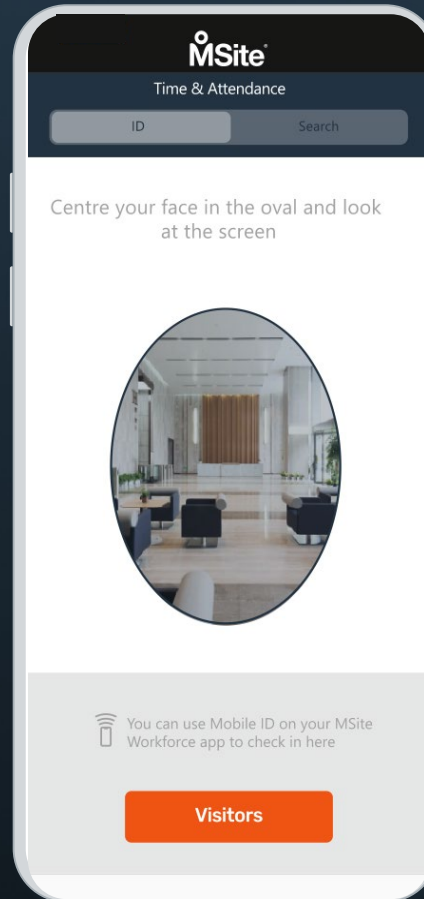


# Visitors Signing In Process.

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**




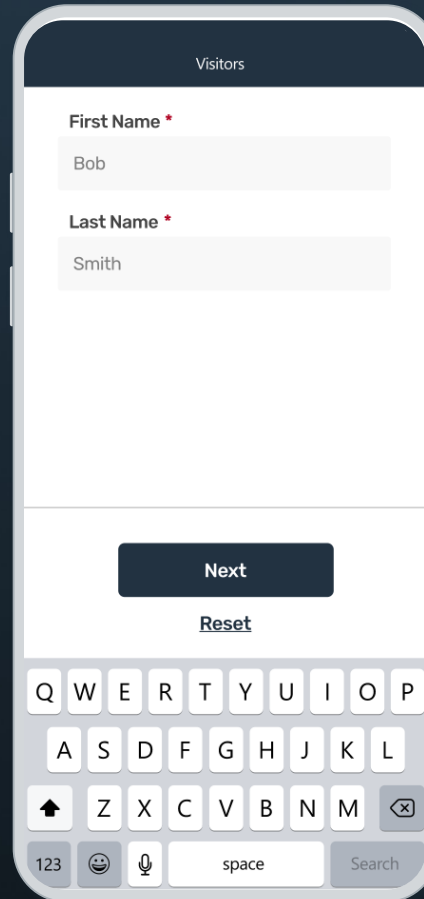
# Existing Visitor Profile.

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



Visitors

First Name \*

Bob

Last Name \*

Smith

Next

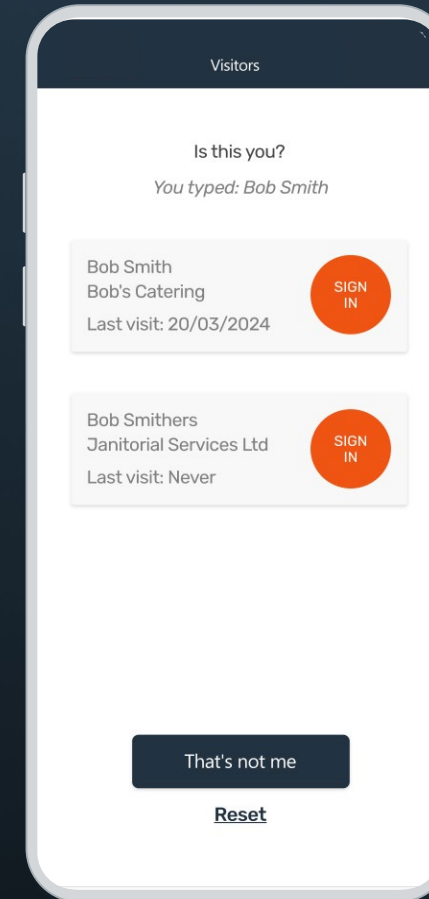
[Reset](#)

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?

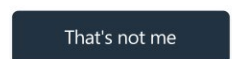
You typed: Bob Smith

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

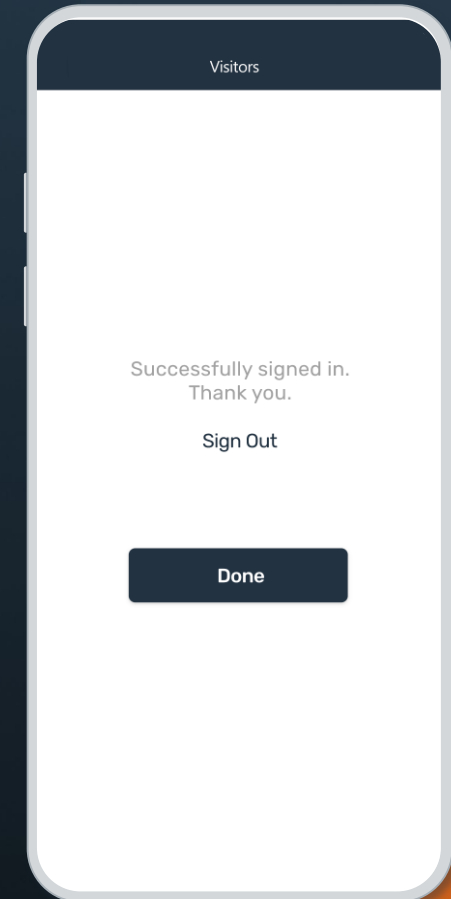


Bob Smithers  
Janitorial Services Ltd  
Last visit: Never






[Reset](#)



Visitors

Successfully signed in.  
Thank you.

Sign Out

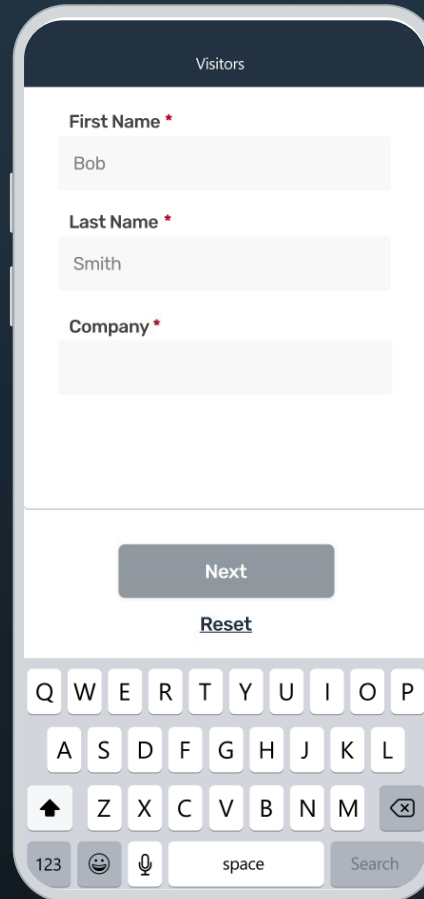




# New Visitor Profile.

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

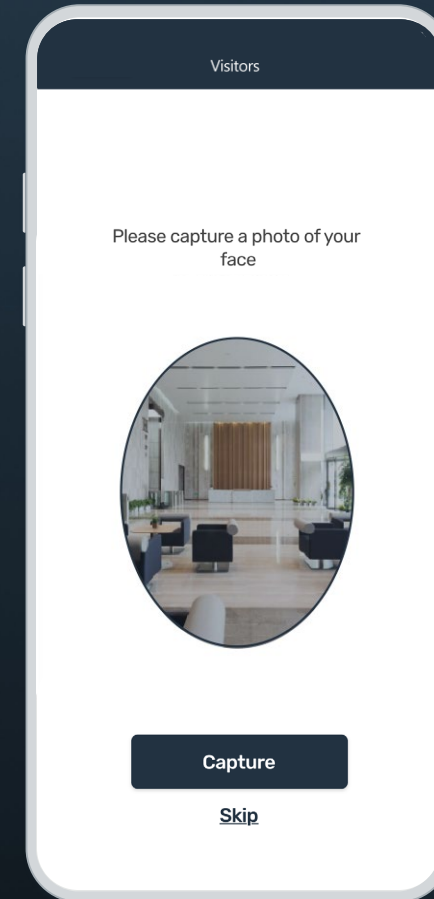
[Reset](#)

Q W E R T Y U I O P

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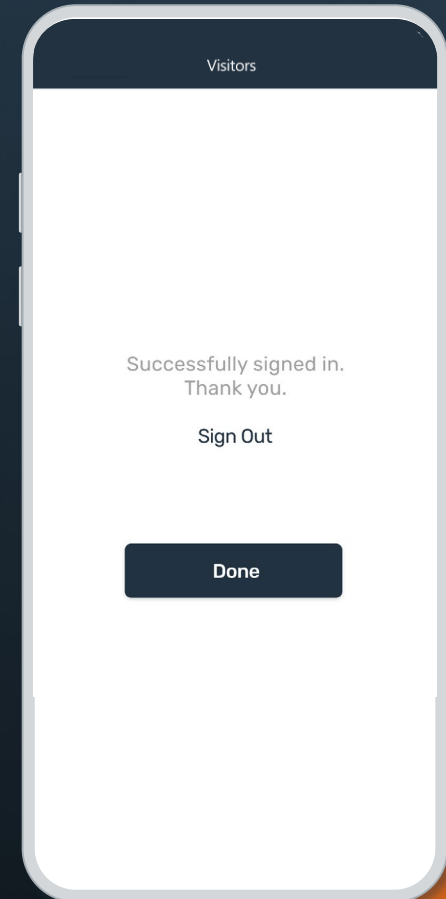
Visitors

Please capture a photo of your face



Capture

[Skip](#)



Visitors

Successfully signed in.  
Thank you.

Sign Out

Done

# FAQ's

**Q. 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.**