

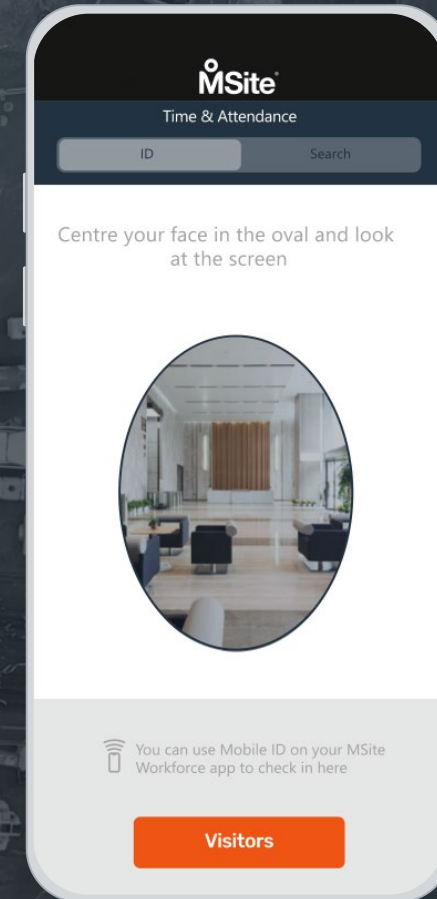


Training Hub

Visitor Management.

Welcome to the MSite Training Hub.

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

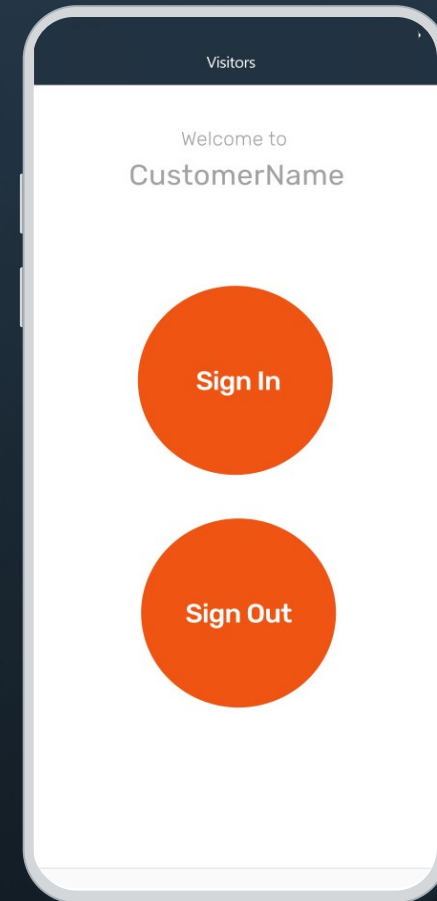


Visitor Management.

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**
- **First Name**
- **Last Name**
- **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 web application interface. On the left is a dark sidebar with a menu containing: Dashboards, Contractors, Workers (with a sub-menu where 'Add New Visitor' is highlighted), 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 form fields for 'First Name', 'Last Name', 'Assignable as Visitor Card' (set to 'No'), and 'Visitor Card (Temporary)' (set to 'Please Select'). To the right of these fields is a circular profile picture placeholder with icons for 'Upload', 'Capture', and 'Scan', and a checked checkbox for 'Use face biometrics'. The 'Site Association' section below shows 'No Site Associations' and 'No Site Groups', with links for 'View History', 'Add Site Group', and 'Add Site'. At the bottom, there is a section for 'CSCS Cards and Affiliated Card Schemes' with an 'Add' button. The top of the page includes a search bar for 'Workers & Contractors' and user profile icons.



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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 note 'Ensure personal details are up to date.' and a 'Project/Site' dropdown menu showing 'Dublin'), 'Accreditations' (with a note 'Ensure any applicable Industry and Training accreditations are in place. You can also choose to ensure preparation for work at a specific site.'), and 'ID Checks' (with a note 'Ensure any applicable ID Checks are in completed. You can also choose to ensure preparation for work at a specific site.'). The 'Update Training' section has a checkbox that is checked. The 'Company Wide' section has a checkbox that is checked, with a note '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 a 'Site Specific' section with a checkbox that is unchecked, and a note '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.

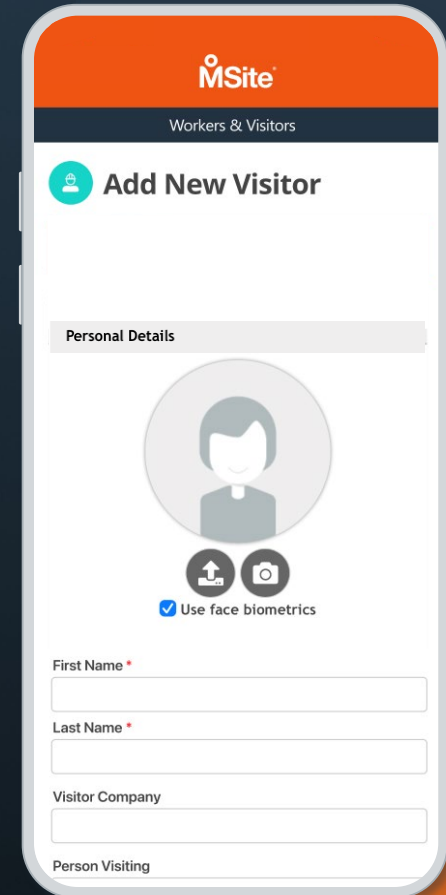
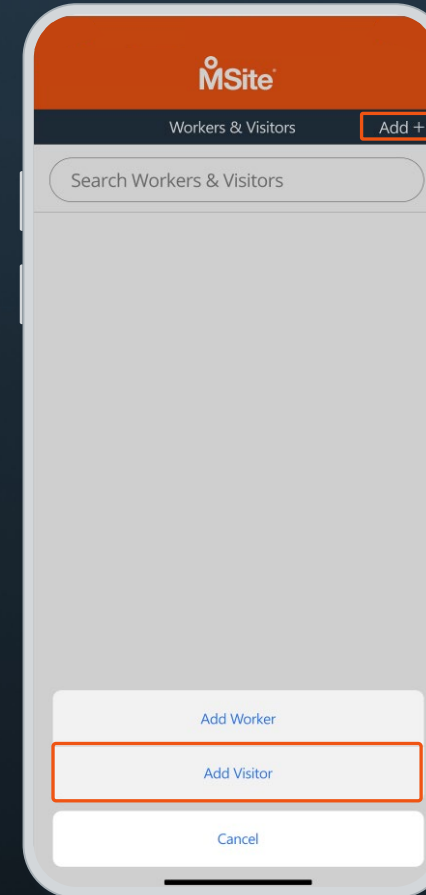
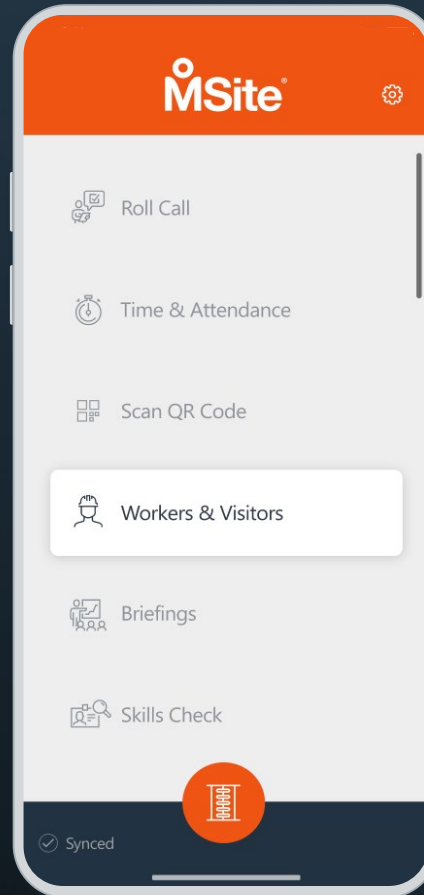


Adding Visitors - Supervisor App.

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.

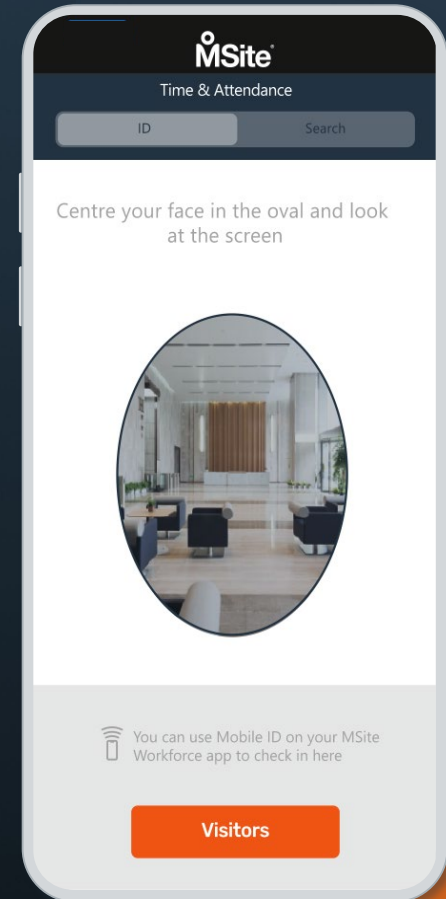
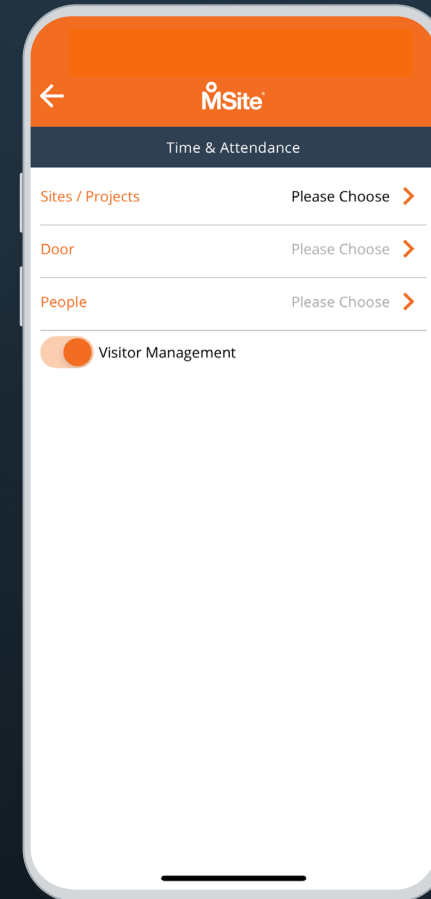
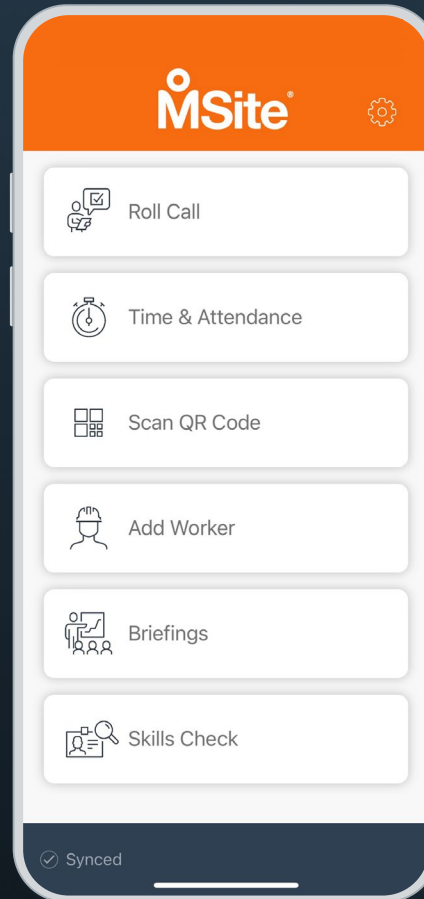
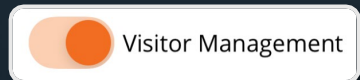


Signing In Visitors - Supervisor App.

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.

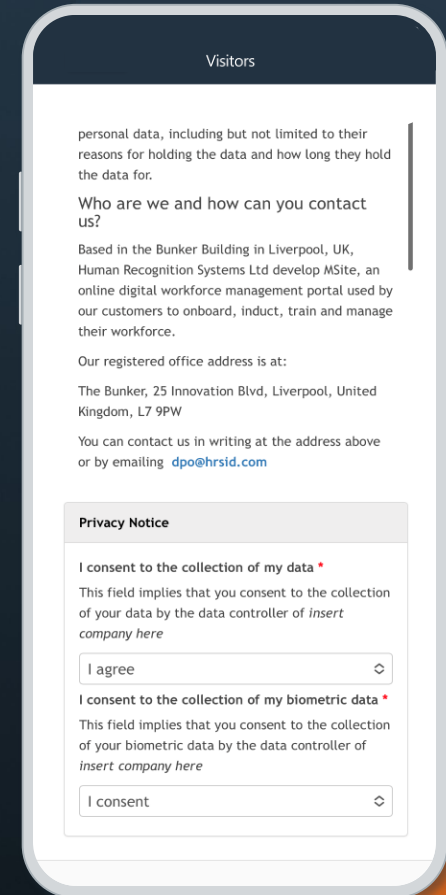
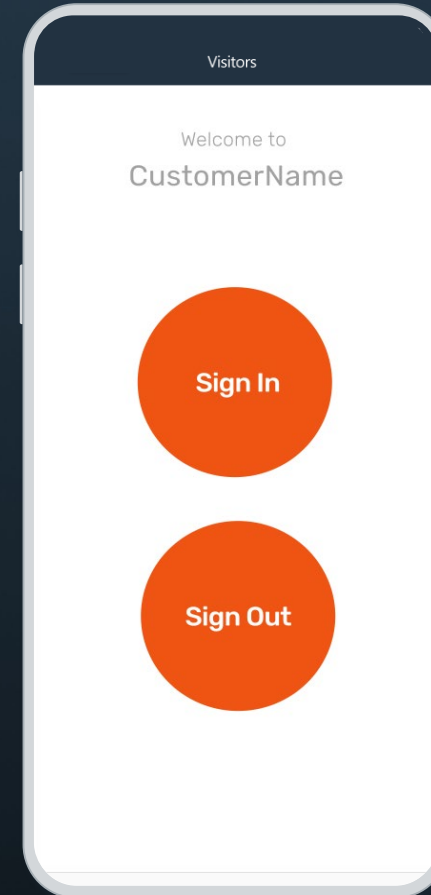
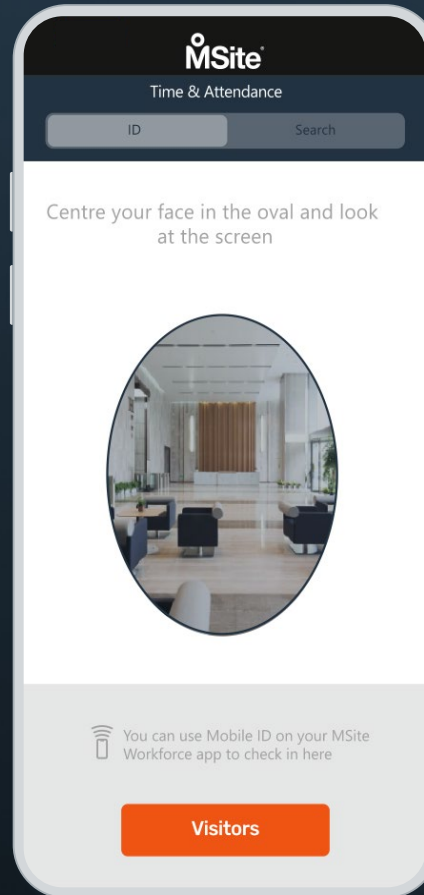


Visitor Signing In Process.

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**




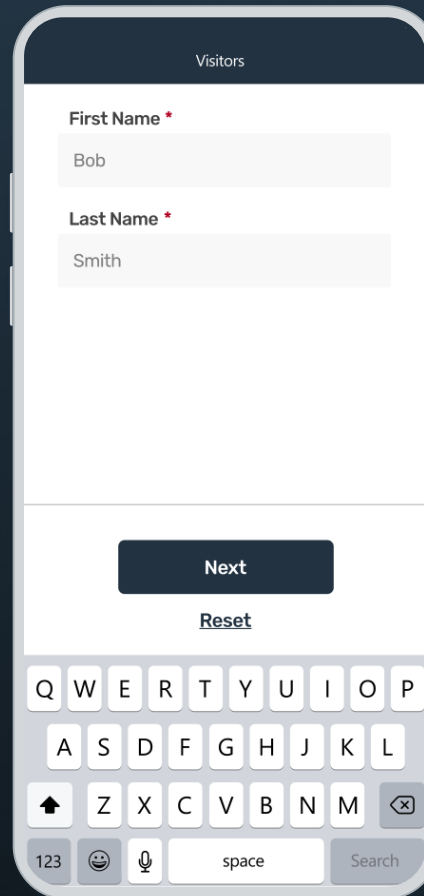
Existing Visitor Profile.

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

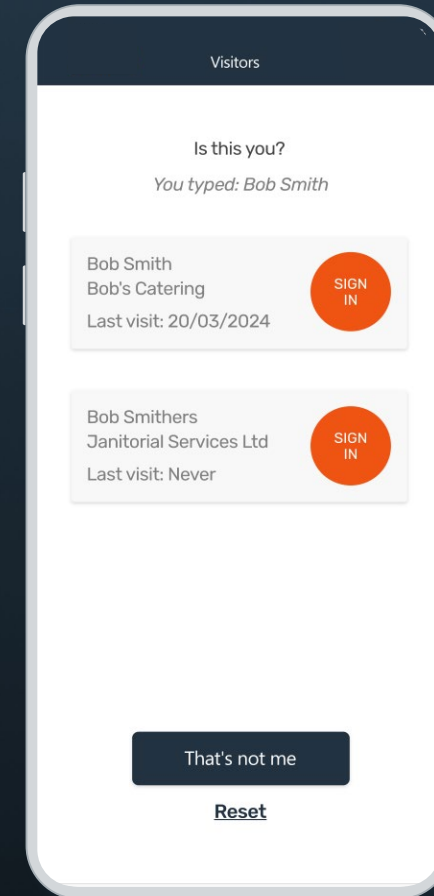
[Reset](#)

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?

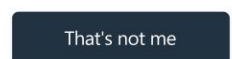
You typed: Bob Smith

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

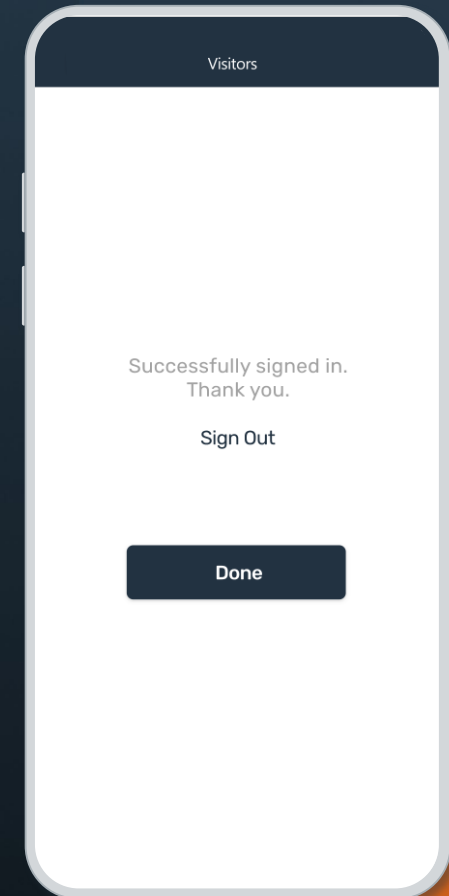


Bob Smithers
Janitorial Services Ltd
Last visit: Never






[Reset](#)



Visitors

Successfully signed in.
Thank you.

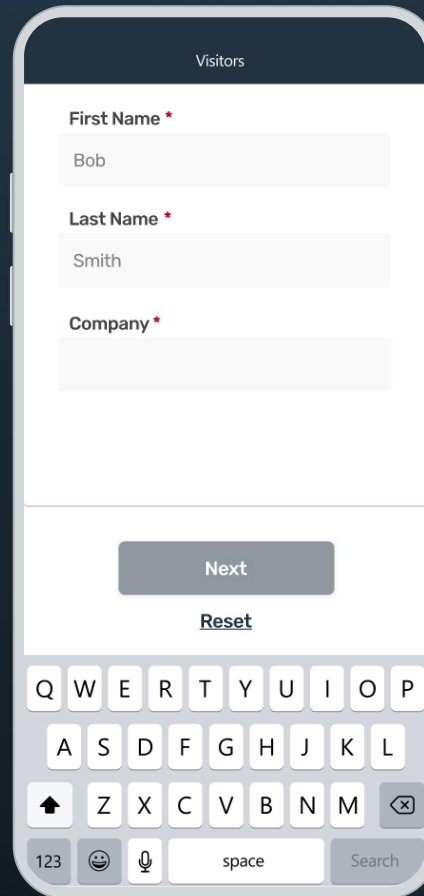
Sign Out



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

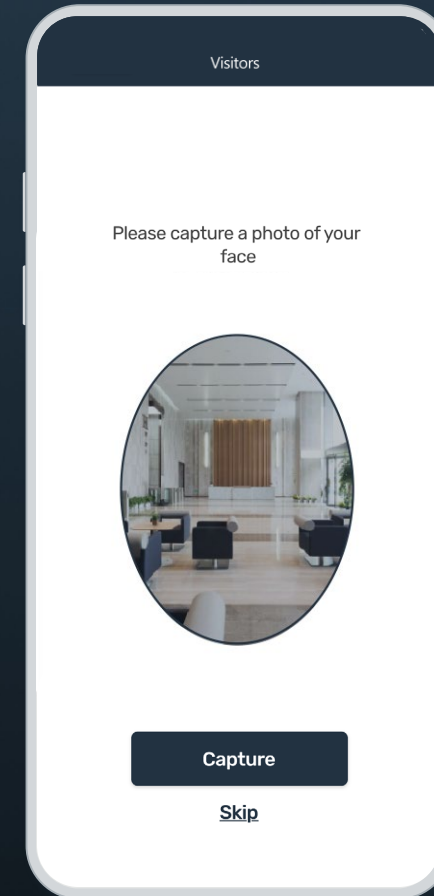
[Reset](#)

Q W E R T Y U I O P

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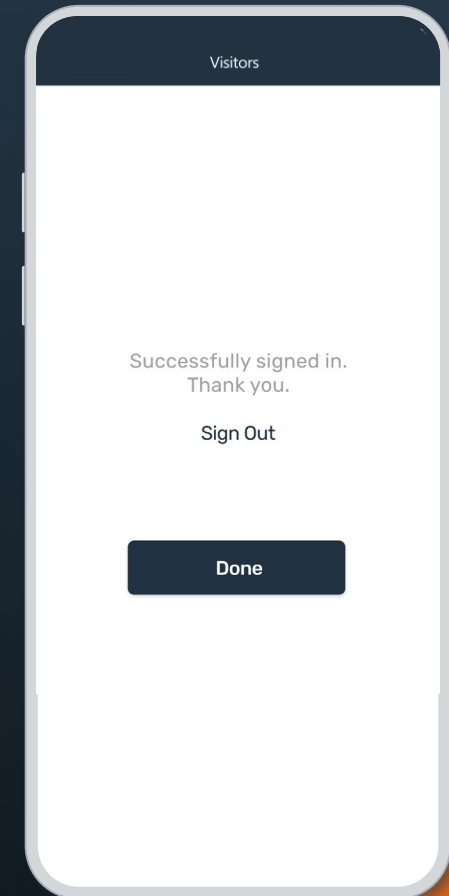
Visitors

Please capture a photo of your face



Capture

[Skip](#)



Visitors

Successfully signed in.
Thank you.

Sign Out

Done

FAQ's

Q. 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.**