



by Human Recognition Systems Limited (HRS)

MSite Workforce app:

Notifications Training

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Confidential





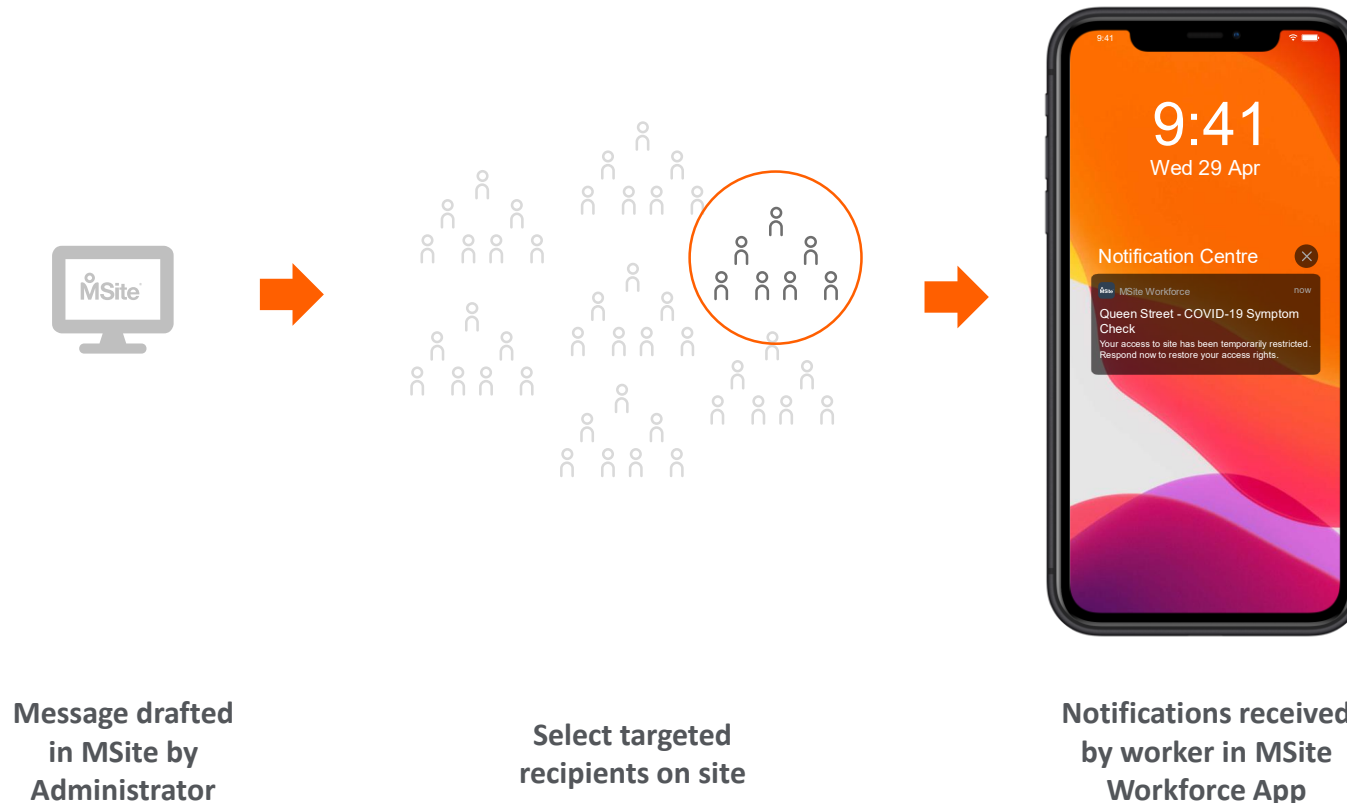
Training Contents

MSite Notifications Overview		Page 3
Five Easy Steps for Deployment		Page 5
1. Set up MSite Administrators		Page 6
2. Set up and Test Notifications	<ul style="list-style-type: none">• Selecting the right recipients• Additional Notification options• Recalling incorrect messages• Managing access restrictions	Pages 7-17
3. Enrol all the site workforce		Page 18
4. Send Welcome Note		Page 19
5. Send and manage Notifications	<ul style="list-style-type: none">• Managing live Notifications• How to report on Notifications• Frequently asked questions	Pages 20-23

Two-way Communication with the Entire Site Workforce



Notifications provides the ability for sites to **easily communicate** important updates to the site workforce via the MSite Workforce App to help improve site safety, productivity and efficiency.



Notifications provide unique capabilities that cannot be delivered using email or SMS:

- Broadcast to all or a fine-tuned selection of workers
- Mandate responses from recipients where appropriate
- Restrict access on certain responses (e.g. 'I have COVID symptoms')
- Schedule notifications for later delivery
- Set regular recurring notifications
- Recall erroneous notifications
- Full Notification reporting and monitoring

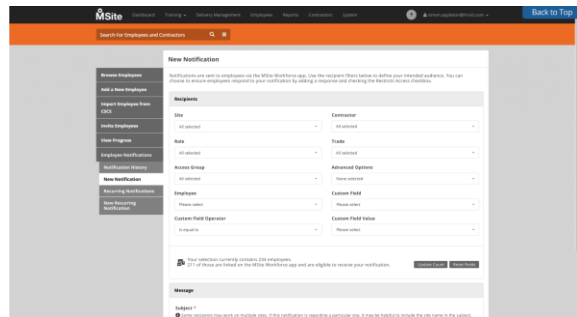
How MSite Notifications Works – Who Does What?



MSite Site Administrators via your company *msitecloud.com* URL

What do MSite Administrators need to do?

- Create and Send Notifications
- Recall Notifications



- Monitor Engagement
- Manage Restrictions

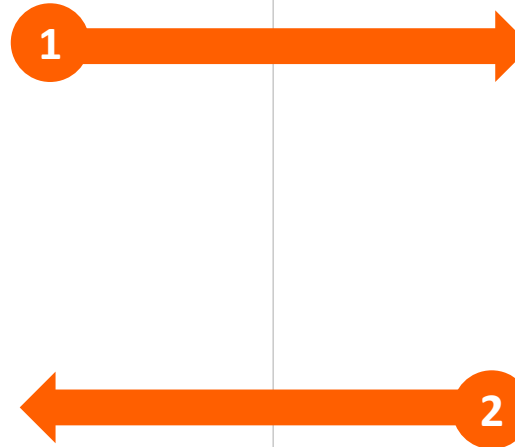


Site Workers via MSite Workforce App



What do Site Worker need to do?

- Receive Notifications
- Respond to Notifications



Five Easy Steps to Set Up your Site with MSite Notifications

1

Set up Employee Notifications role for the right MSite Administrators on your site

2

Set up and run Test Notifications to check all is working

Full instructions on how to create Notifications are included in this training

3

Ensure all the site workforce are enrolled and using the MSite Workforce App

4

Send welcome note to all site workforce App users

5

Send and manage Notifications to help keep workers on your site safe, informed and up to date

Check if your company has guidelines to ensure you make best use of Notifications

1 Set up Employee Notifications Role for Administrators

Only Administrators of MSite with the new Notifications role assigned can create and manage Notifications for the site so these will need to be set up. Once enabled, the Notifications can then be sent on any of the sites an Administrator is assigned.

Task	Required MSite Administrator Level		
	Employee Notifications	Any Employee Role (e.g. View / Edit / Restricted)	System Basic (or above)
Create and Manage Notifications	Yes	AND	Yes
Manage Worker Access Restrictions			Yes
Give another Admin Notification Role	Yes	AND	Yes

! Users with the Notifications role can be identified using the MSite User Audit report, under Reports > System

HINTS & TIPS >> Check your company policy for which Administrators need to be set up and who is responsible for this.

2 Set Up and Run Test One-Off Notifications

HINTS & TIPS >> In the event Notifications are mistakenly sent, we let you know how to Recall these.

1

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Select Employees / Employee Notifications / New Notification

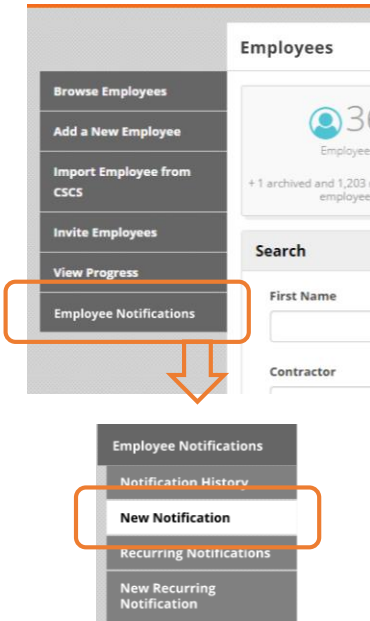
Select Notification recipients and Check Count

Write Notification message

Select additional message options

Double check and send message!

Manage Worker Access Restrictions (as required)



HINTS & TIPS >> See “2b Who can you send a MSite Notification to?” for further information. For the test message select you or your immediate on-site team.

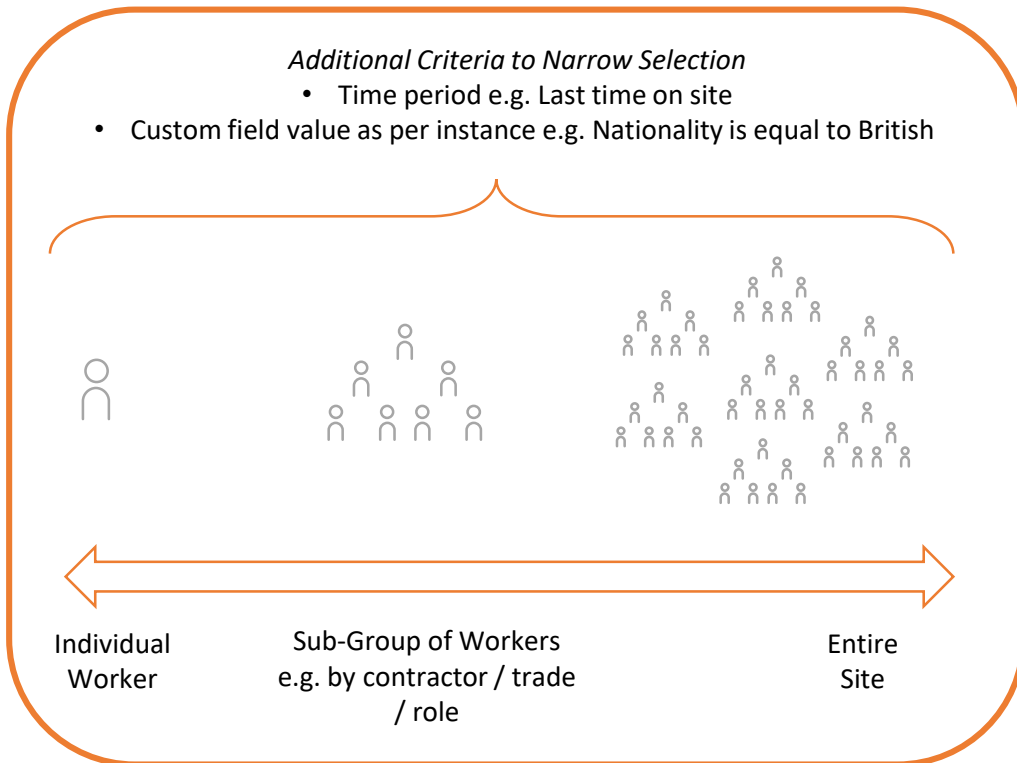
The image shows a form for creating a notification. It has four tabs: 'Message', 'Responses', 'Scheduling', and 'Access Restriction'. The 'Message' tab is active. It contains fields for 'Subject *' and 'Body *'. Below the 'Subject' field, there is a note: 'Some recipients may work on multiple sites. If this notification is regular, it is helpful to include the site name in the subject.' The 'Responses' tab is also visible and contains a question: 'Worker Response required?'. The 'Scheduling' tab contains a question: 'When to be sent – now or at scheduled time?'. The 'Access Restriction' tab contains a question: 'Restrict Worker Access based on non-response or adverse response?'.

HINTS & TIPS >> See “2f Managing Access Restrictions” for further information. It is important to understand this so not to adversely impact site when restrictions occur

HINTS & TIPS >> See “2d Better Understanding Message Options 1/2” for further information. For the initial test messages, we recommended not restricting access.

2b Who can you send an MSite Notification to?

Each notification can be sent to a specific audience based on the selected Recipients criteria from a single worker to an entire site and any subgroup in between.



New Notification

Notifications are sent to employees via the MSite Workforce app. Use the recipient filters below to define your intended audience. You can choose to ensure employees respond to your notification by adding a response and checking the Restricts Access checkbox.

Recipients	
Site <input type="text" value="All selected"/>	Contractor <input type="text" value="All selected"/>
Role <input type="text" value="All selected"/>	Trade <input type="text" value="All selected"/>
Access Group <input type="text" value="All selected"/>	Advanced Options <input type="text" value="None selected"/>
Employee <input type="text" value="Please select"/>	Custom Field <input type="text" value="Please select"/>
Custom Field Operator <input type="text" value="Is equal to"/>	Custom Field Value <input type="text" value="Please select"/>

Your selection currently contains 234 employees.
211 of those are linked on the MSite Workforce app and are eligible to receive your notification.

[Update Count](#) [Reset Fields](#)

HINTS & TIPS >> Use Advanced Options to help select the **right** workers for the Notification (e.g. On Site Right Now, On Site When Sent or On Site in last 28 Days)

HINTS & TIPS >> Check the number of workers in the selection criteria and importantly those with Workforce App – it is critical site enrol all the workers on the App to maximise the effectiveness of each notification. If you change the criteria fields, remember to update the count.

2b Better Understanding Message Options - 1

Responses

Add

Worker Response Required?

Each message can require a specific response from the Worker which in turn can help control access to site for certain *adverse* responses. There is no limit to the number of responses per Notification but we recommend no more than 5.

Add Response

Ordinal *

Text *

Display Colour

Blue (normal)

Restricts Access

☐ Employees who choose this response will be pr

Delete

ORDINAL – enter the display order number for responses (0 is first)

TEXT – enter response text

COLOUR – blue is the standard colour, with optional red for any negative responses to stand out

RESTRICTS ACCESS – enforces worker access restriction if this adverse response selected. *This cannot be the only response available to the worker.*

Examples:

1	Ordinal	Message > Request if worker showing Covid-symptoms	
	0	No - I feel physically normally	ACTION: None
	1	Yes – I have one or more of the shown symptoms	ACTION: Restrict Access

2	Ordinal	Message > What work are you doing immediately on site?	
	0	Productive work	ACTION: None
	1	Non-productive work	ACTION: None
	2	Do not know	ACTION: None

3	Ordinal	Message > New Site Washing Facilities	
	0	I understand about new Site facilities	ACTION: None

RESTRICTS ACCESS – a non-restricting option must always also be provided in this example

Individual Responses can be edited and deleted up to the message being sent. All responses can be reported on for future analysis.

2b Better Understanding Message Options - 2

1 Schedule Message

Messages can either be sent immediately* (default) or scheduled by time and day.


To set a pre-determined scheduled date, check the box and set the time and date when the Workers will receive the message.

Scheduling


Enable scheduling

☒ Automatically send this notification at the time and date specified above, using the recipient filters specified above.

Time

09:00  automatically at

Date

19/05/2020 


* it can take up to 10 minutes to push Notifications out to workers

2 Restrict Access if NO Worker Response provided

Finally there is an option that for any Notifications that require a Worker Response that access is restricted until they do respond. This should be used for important and safety critical Notifications whereby the acknowledgement of the worker is vital;

- **Extension of demolition works in area A and impact on site**
- **Visit of senior official and associated details**
- **New Health & Safety procedure launched on-site**

Access Restriction

Restrict Access 

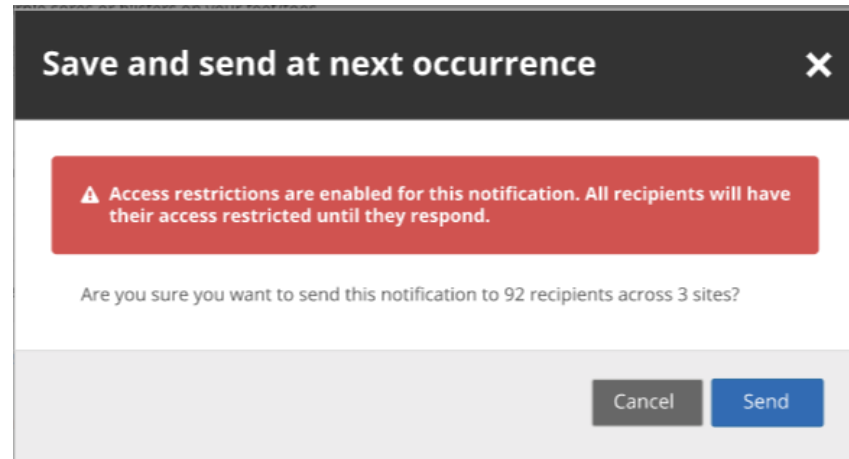
☒ Recipients of this notification will have their access restricted until they respond.

On-the-day Restriction

☐ Restrictions imposed for not responding will only be applied on the day the notification is sent. If an employee is not on site on the day, they will not be restricted when they return to site, regardless of whether they responded or not. Restrictions imposed due to adverse responses will remain unchanged.

This can be set either on-the-day restriction (of the day the Notification is sent) or without restriction.

2e **IMPORTANT!** – Double Checking Access Restrictions (...and Recall)



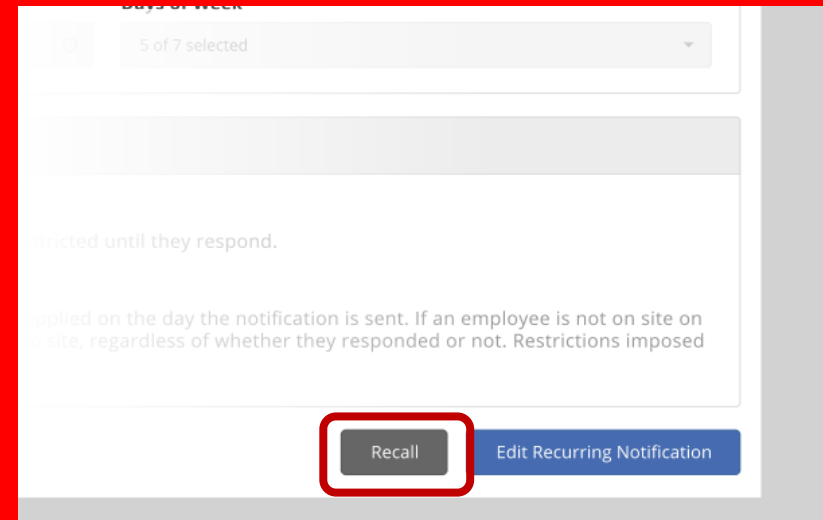
Given the potential impact on site access that a restricted access Notification could have, a warning message is shown prior to sending as a double check.

4

5



HOWEVER if any Notification (with or without access restrictions) has been mistakenly sent, there is a RECALL function which removes the message en masse and all restrictions associated with the notification. This can be run at any time once a Notification is sent.



Employees > Employee Notifications > Notification > Recall

NOTE: Recurring Notifications will also require the recurrence to be removed to stop future messages – see Recurring Messages

2e Receiving Notifications via the Workforce App

Workers should now see Notifications as part of the Workforce App, with new and existing messages displayed. Note that old messages can be viewed via the Show Read option in the Inbox.

Recommended App Permissions

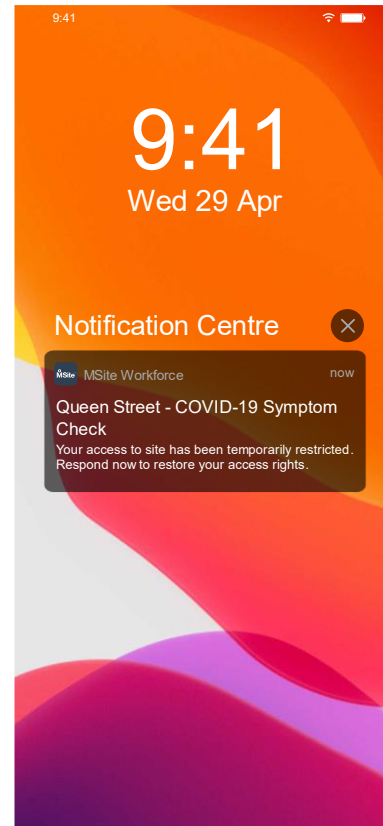
- Grant permission for the MSite Workforce app to use Notifications on their device to ensure they receive important announcements from site. If not, new messages will not flag via the Notification Centre (see example)

"App" Would like to Send You Notifications

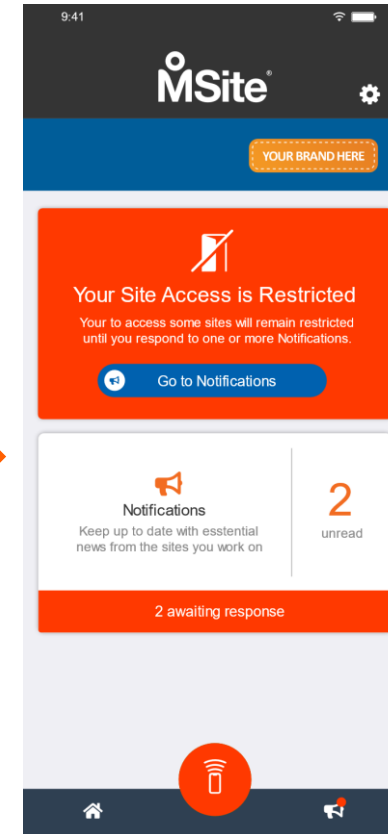
Notifications may include alerts, sounds and icon badges. These can be configured in settings.

Don't Allow

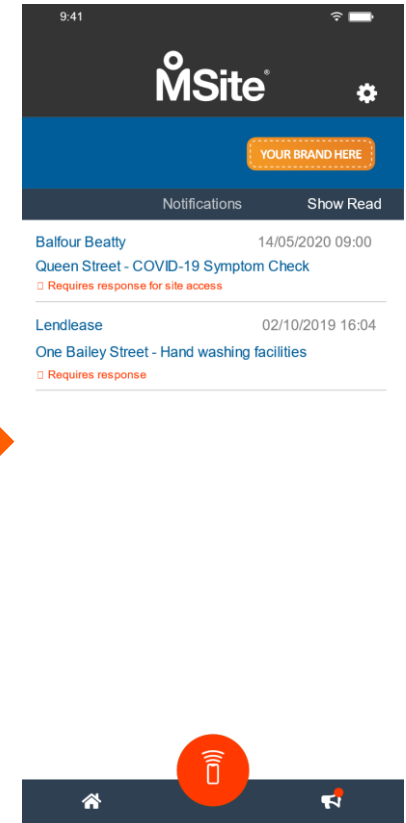
OK



NOTIFICATION CENTRE
Example New Message



HOME PAGE
Example
Restriction Warning

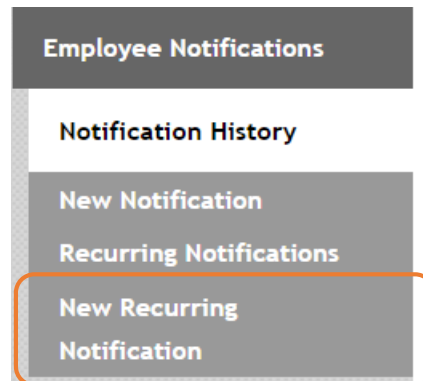


INBOX
Example
Worker Notifications *

* Note: if a sub-contractor works for two or more Contractors, inbox messages will be displayed from both.

2 How to Create Recurring Notifications

Notifications can also be created to be sent on a recurring basis based on the selected time and day(s) of week.



The process to set up a New Recurring Notification is the same as for a One-Off message except for the inclusion of the Recurrence section (shown right).

Once complete the Recurring Notifications can be viewed, along with the recurring days of the week.

Recurrence

HINTS & TIPS >> Select ALL the regular days on which the Notifications

Enable Recurrence

☒ Automatically resend this notification on the day(s) and time specified below. The list of recipients will be updated automatically each time the notification is sent, using the recipient filters specified above.

Time

18:15

Days of Week

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Access Restriction

Restrict Access

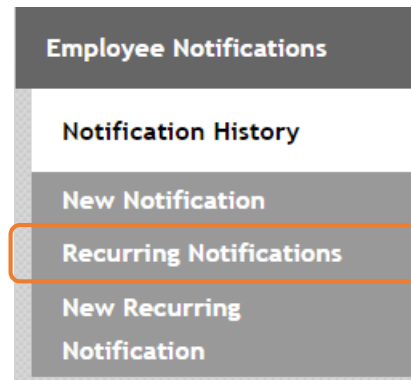
☐ Recipients of this notification will have their access restricted until they r

Recurring Notifications										
Subject	Last Saved By	Contractor	Recurrence	Time	M	T	W	T	F	S
	HRS User	Human Recognition Systems	Enabled	12:30	✓	✓	✓	✓	✓	✓
	HRS User	Human Recognition Systems	Enabled	11:15	-	✓	✓	✓	✓	-

Employees > Employee Notifications > Recurring Notification

2 How to Edit or Stop Recurring Notifications

Once created Notifications will run until manually stopped.



Select the required Notification to update from the list which will be displayed.

Subject	Last Saved By	Contractor	Recurrence	Time	M	T	W	T	F	S	S
[REDACTED]	HRS User	Human Recognition Systems	Enabled	12:30	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	HRS User	Human Recognition Systems	Enabled	11:15	-	✓	✓	✓	✓	✓	-

TO EDIT:

Make the required changes to the Notification and then scroll to the bottom and select:

Save & Send at Next Recurrence

TO DISABLE:

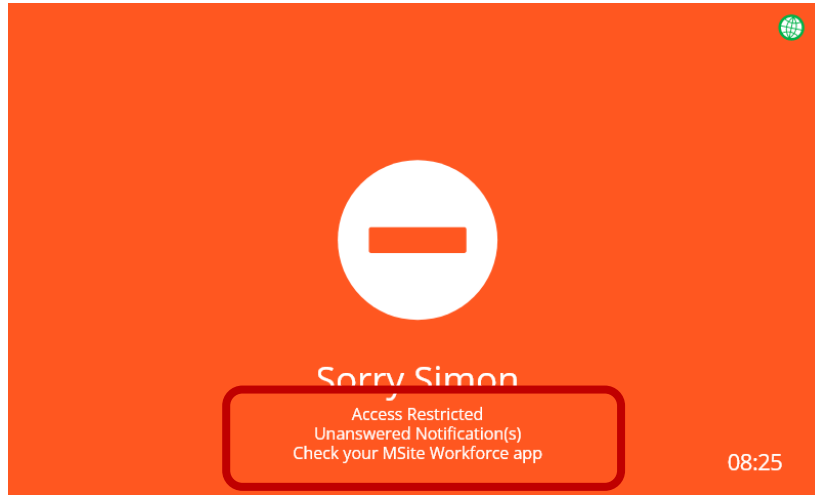
Scroll to the bottom of the Notification and select:

Save & Disable Recurrence

Employees > Employee Notifications > Recurring Notification

2f How does the Worker see any Notification Access Restrictions?

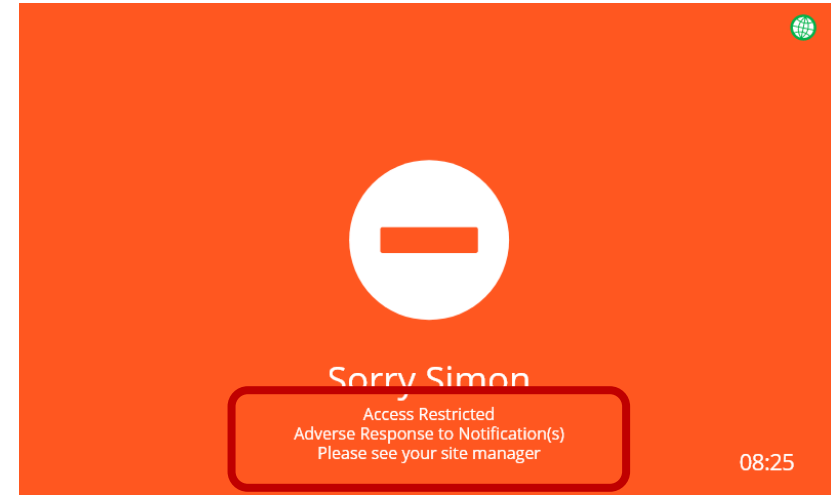
Access Restrictions are displayed on the MSite Touch device so the worker will see these when trying to access site, whatever the Worker's access method (e.g. by App, Fingerprint, Card)



Unanswered Notification(s)

How to Rectify?

Employee can self-rectify by opening the App and responding to outstanding notifications. Can also be rectified by an MSite Administrator with 'Employee' permissions



Adverse Response to Notification(s)

How to Rectify?

Can only be rectified by an MSite Administrator with 'Employee' permissions

HINTS & TIPS >> See "How does the MSite Administrator resolve Restrictions for a Worker?" for further information.

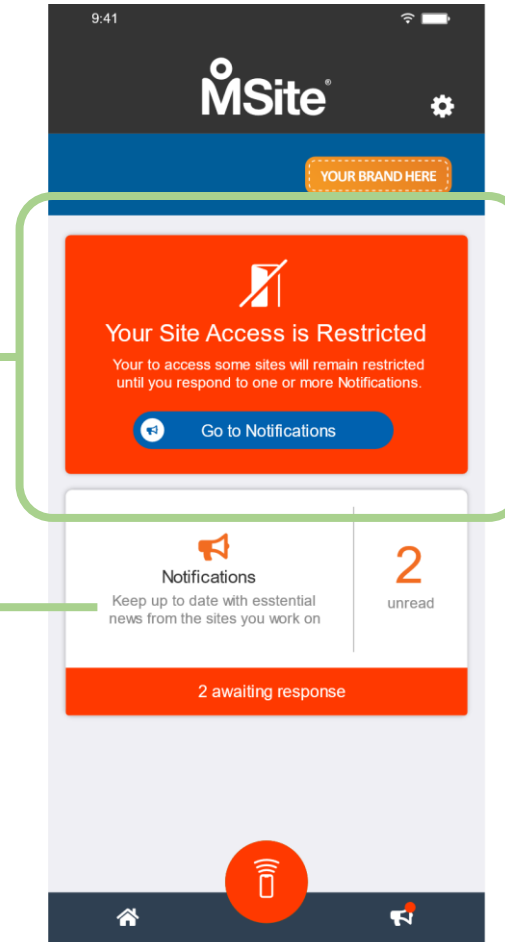
2f How does the Workforce App show Notification Restrictions?

Unanswered Notification(s) Restriction

Employee can self-rectify by responding to outstanding notifications

Non-restricting Notifications

! NB: Adverse Response restrictions are not visible in the MSite Workforce app



2f How does the MSite Administrator resolve Restrictions for a Worker?

Restrictions imposed for Unanswered Notifications and Adverse Responses to Notifications can be identified in several areas of MSite:

1 Run these Reports

Employees With Access Restrictions report

details workers who currently have their access restricted

Transaction Diagnostics report

details workers who have been denied access due to Notification Restrictions

Reports > Health & Safety / System

2 View Worker Information

Employee page

details current restriction status for a chosen worker.
These can then be removed via Fix Access Issues.

The screenshot shows the MSite Employee page. On the left, there is a sidebar menu with the following options: 'Import Employee from CSCS', 'Invite Employees', 'View Progress', 'Employee', 'Print Enrolment Form', 'Enrol', 'Import CSCS Card', 'Capture Image', 'Print Card', 'Add Incident', 'Restrict Access', and 'Fix Access Issues'. The 'Fix Access Issues' option is highlighted with a red box. On the right, there is a 'Personal Details' form with the following fields: 'First Name *' (Alan), 'Last Name *' (Smith), 'Contractor *' (A.C.C. Cleaning), 'Role *' (Supervisor), 'Contact Number', 'Date of Birth' (dd/mm/yyyy), 'Email Address' (appleton.simon@gmail.com), 'Gender' (Please Select), 'NI Number', and 'Post Code'.

Employees > Employee Profile > Fix Access Issues

3 Enrolling the Site Workforce

In order to maximise the benefit of the Notifications App, sites should encourage high level of Workforce App adoption through a comprehensive enrolment plan.

New App Workers

The key steps for the enrolment of the Workforce App

- Each worker downloads the MSite Workforce App
- Link worker to your Company via QR Code
- Use App for Contactless Entry and Contract Tracing

For further information about worker enrolment, please see the Workforce App enrolment User Guide.



Reminder:

Ensure worker sets Push permission in order to receive App and use of Notifications to provide alerting through Notifications Centre

Existing App Workers

For those already enrolled on the Workforce App, sites just need to ensure that each worker:

- has the latest version of the App *
- updates permissions for the App (see Reminder)
- accepts updated Terms and Conditions (if required)

Legacy App Version Users

Workforce app users with a legacy version** installed:

- Will not receive any notifications
- Once they upgrade to a compatible app version, they won't receive notifications that have already been processed

Version number found in App / Settings

*any Workforce App version 1.14.X or higher.

** any Workforce App version 1.13.X or earlier.

4 Send the Site Notifications Welcome Note

We recommend that once the complete site workforce is enrolled that the Notifications product is formally launched as the new tool to help effectively communicate with everyone. Each company will have their own ideas but here is a sample message to start things off.

Message Recipients	All Site Workers								
Subject	Welcome to the new way to keep you safe and better informed								
Body	<p>As part of our commitment to providing a safer, more productive and informed workforce we are implementing a new way of communicating with each and everyone of you with important information. The MSite Notifications tool will allow us to send messages directly to you via the Workforce App and don't worry – you will only get Notifications that are relevant to you and your work on the site.</p> <p>So keep an eye out for messages, some of which will require a direct response from you, including one in this message. If you have any questions, just ask your supervisor, else to celebrate the launch of the new App, let us know if you want donuts at the end of day in the canteen. Enjoy!</p>								
Responses	<table><tr><td>0</td><td>Yes – definitely up for donuts today!</td><td>ACTION: None</td></tr><tr><td>1</td><td>No for donuts but maybe next time</td><td>ACTION: None</td></tr></table>			0	Yes – definitely up for donuts today!	ACTION: None	1	No for donuts but maybe next time	ACTION: None
0	Yes – definitely up for donuts today!	ACTION: None							
1	No for donuts but maybe next time	ACTION: None							
Scheduling	Send immediately	Access Restrictions	None						

5 Sending and Manage Site Notifications

Now your site should be ready to start sending out messages.

Once sent all messages are then able to be viewed on the Notifications History.

Within this history, it contains all Notification History including:

- Notification Subject
- Notification Author
- Recurring Notification
- Status > Sent or Scheduled (due to be Sent)
- # of Recipients
- Sent Date

Note:

A site Administrator can see any messages sent to employees on a site where they have permissions

Notification History							
Subject	Sent By	Contractor	Recurring	Status	Recipients	Sent Date	
Test Recurring	HRS User	Human Recognition Systems	True	Scheduled	2	13/10/2020 16:45:00	
phil test 6	HRS User	Human Recognition Systems	False	Sent	5	12/10/2020 21:07:16	
Phil test 5	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 21:01:29	
Phil Test 4	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 20:24:38	
Phil Test 3	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 20:20:40	
Phil Test 2	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 19:29:35	
Test 1	HRS User	Human Recognition Systems	False	Sent	2	12/10/2020 16:45:00	
QA 03	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 16:43:29	
Test 2	HRS User	Human Recognition Systems	False	Sent	2	12/10/2020 16:33:44	
This is a test	HRS User	Human Recognition Systems	False	Sent	1	12/10/2020 14:30:17	

Employees > Employee Notifications > Notification History

HINTS & TIPS >> Use the arrows and sort by Sent Date to help locate specific messages .

Show 10 < < 1 2 > >>

5 Example Notifications for your Site

How your site and company deploy the Notifications product is now completely in your hands. However to give you a helping hand, here are a few best practice ideas from our customers as to help getting Notifications quickly established.

Health & Safety		Site Operations		Worker Well-Being	
Message	Do you have any COVID19 symptoms	Message	Overtime available	Message	About The Lighthouse Club
Recipients	Entire workforce	Recipients	Specific trade	Recipients	Entire workforce
Message	Introducing staggered start times	Message	Important visitors on site tomorrow	Message	Information about company benefits
Recipients	Entire workforce OR by contractor	Recipients	Entire workforce	Recipients	Main contractor workers only
Message	Icy conditions so take extra care	Message	Project milestone reached	Message	Free doughnuts!
Recipients	Entire workforce	Recipients	Entire workforce	Recipients	Entire workforce

5 Monitoring Worker Engagement

Finally, there is full audit Reporting associated with each and every Notification that is sent. This allows Administrators to understand the effectiveness of Workforce engagement and analyse specific responses.

1 **Employee Notifications Audit**

This report details the recipients of Notifications sent out by MSite to this section

Report Parameters

Sent Date - From: 12/10/2020 Sent Date - To: 11/11/2020

Site: All Selected Employee: All Selected

Contractor: All Selected Trade: All Selected

Role: All Selected Advanced: None selected

Access Group: All Selected Response Status: All Selected

Custom Field: Please Select Custom Field Operator: Please Select

HINTS & TIPS >> Use the criteria to filter the required Notifications

HINTS & TIPS >> Use Report Status to select specific Notification information including Adverse responses

Unselect All
Not sent (all)
Not opened
Opened - response not applicable
Opened - no response
Blue (normal) response
Red (adverse) response

HINTS & TIPS >> Use "Not sent (all)" to address non-notified employees for important communications

Generated at: 10/02/2020 10:17 AM

2 Employee Notifications Audit

Subject	Sent Date	Employee	Contractor	Role	Trade	Response	Response Date
Queen Street - COVID-19 Sy...	24/03/2020	Alan Jones	Stones Ltd	Operative	Bricklayer	No - I feel fine today	22/04/2020
Queen Street - COVID-19 Sy...	24/03/2020	Bob Jones	Stones Ltd	Supervisor	Carpentry	No Response	-
Queen Street - COVID-19 Sy...	24/03/2020	Andrew Smith	Woodwood & Son Ltd	Manager	Carpentry	Yes - I have one or more of these...	24/03/2020
Site Shutdown	23/03/2020	Andy Adams	A1 Concrete Ltd	Visitor	Visitor	Not applicable	-

Export

HINTS & TIPS >> Export this information into Excel for further analysis

Reports > System > Employee Notification Audit

5 Notifications Frequently Asked Questions

Question	Answer
Does the Worker need to use the App for site access to receive Notifications?	No. Accessing and using Notifications is not linked to use of the Workforce App for accessing site but this is encouraged to help workers get use to the App and checking it on a regular basis.
Once a Worker selects their response within a Notification can this be changed?	No. Once they have responded workers can not change their response. Administrators may be required to update Access Restrictions following an incorrect selection
What happens if a Workers phone is off when a scheduled Notification is due?	The Notifications are automatically queued for re-sending for up to 28 days.
What happens if I do not include any specific requirement for worker responses in a Notification?	If Responses are not added, then the Notification will just be sent with only the message subject and body. However using responses provides more options, including restricting access and all responses for Notifications can be separately reported on to help obtain accurate feedback from workers.