

Onsight How to: Receive an External Guest Invite

OVERVIEW

This document provides instructions, best practices, and tips for when you receive an external guest invitation to join a video collaboration session using the full client application.



Note: User Mode (Expert & Field) only apply to the full client application. Onsight Connect for Web represents a streamlined experience for both expert and field users. For detailed instructions on how to use the Onsight Connect for web, please refer to the "[Just-in-Time' Training](#)" website and locate **BEST PRACTICES > Tip Sheets for Onsight Connect:**

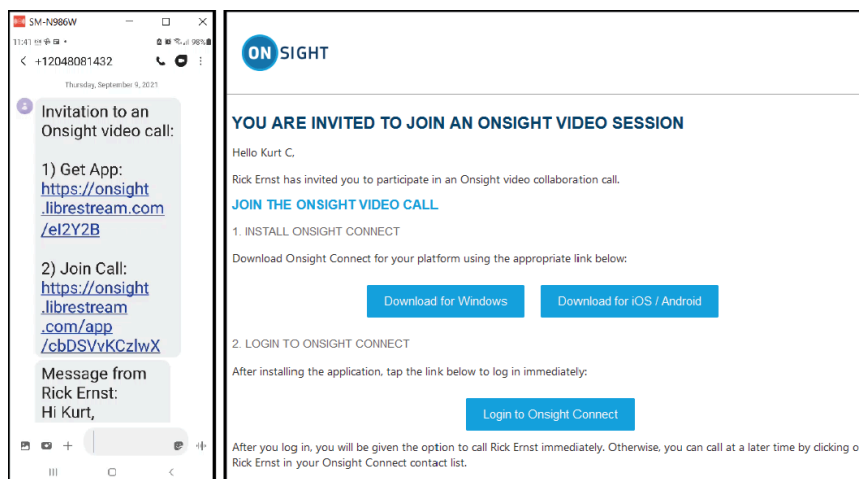
- HOW TO: Access the Onsight Web app for Windows (PC/Tablets)
- HOW TO: Access the Onsight Web app for Smartphones

What the External Guest Needs to Know

The **External Guest** will receive an email or Short Message Service (SMS)/text invitation. It contains instructions on how to install the Onsight software and connect to the collaboration session. The **External Guest** will need to:

1. Access the invitation to download and install the software or app.
2. Click the link to join the call — The login process is automatic.
3. If the **External Guest** was assigned using **Expert Mode**, then they will be able to share control and access all features of Onsight Connect.
4. If the **External Guest** account was assigned using **Field Mode**, then they will be able to view the video produced from their camera and are limited to drawing onscreen using Telestration tools and/or muting their audio.
5. Typically, most functions are controlled by the **Inviter** who can take snapshots, record video/audio and pause video sharing.
6. Shortly thereafter, if the **External Guest** needs to call the **Remote Expert** again, the **Inviter/Expert's** address is available within their **CONTACTS**. Tapping the Remote Expert's name will initiate a new call.

Guest Invitation

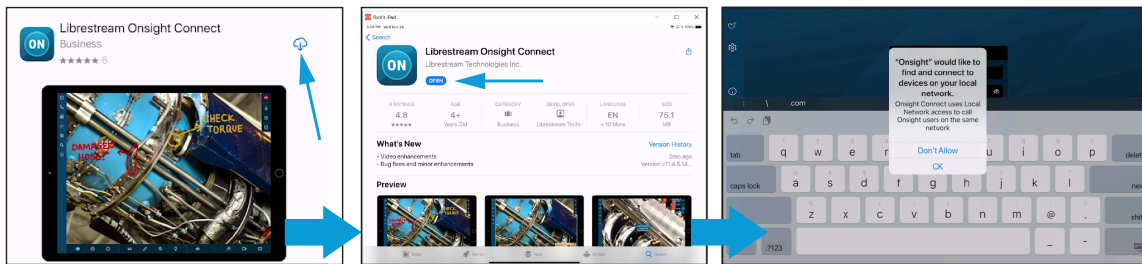



The **External Guest** will receive a SMS (Text) or email invitation. Setting up for the video collaboration session is a two-step process:

1. **Get App/Download for Windows/iOS/Android** — Download and install the Onsite software.
2. **Join Call/Login to Onsite Connect.**

i Tip: First-time Users will be automatically redirected to the App Store (Google Play or Apple Store) according to their device type (Android or Apple).

Step 1: Download and Install Onsite Connect



If this is the first time you are using Onsite, click the first link which will redirect you to the App Store (Google Play or Apple Store) according to your device type (Android or Apple). **Download** , install and **Open** the application.

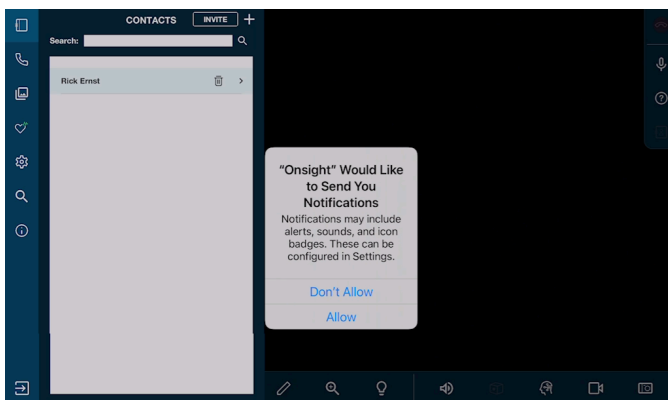
i Tip: You can skip this step if you have previously installed and still have Onsite Connect on your computer or selected device.

Device Permissions

Note:

1. if you are asked for permissions to access your microphone audio, camera pictures, device's location etc., tap **OK**, **Allow** or **Yes**, as necessary.
2. For mobile devices, you can also modify these permissions after the installation. For **Android** — Tap **Settings > Apps > Onsite** and enable **Privacy** settings for **Notifications** and **Permissions**. For **iOS** — Tap **Settings > Onsite** and allow Onsite to access **Notifications** and **Permissions** as required. If your IT department or manager has locked down these settings for your device, you will need to contact them to enable these settings for you.


Step 2: Join the Session



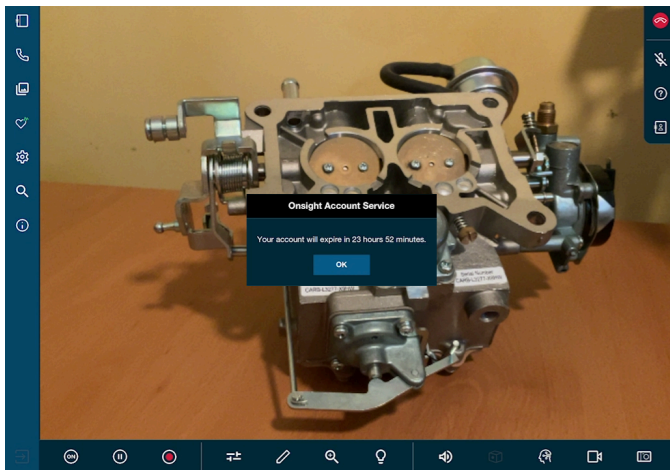
Once the software is installed, return to the SMS (text) or email invite and tap or select the second link to **Login to Onsite Connect** or **Join Call**. Once Onsite launches, it will login automatically and you may see a series of permission requests. Make certain you tap **OK** or **YES** or **Allow** for all permission and message prompts that appear.


Note: If a custom messages appears during login that prompts you to agree to terms and conditions, you must click **OK** to indicate compliance in order to advance.

The External Guest receives a message that states: "Your account will expire in XX hours XX minutes." Click or tap **OK** to initiate the call.

- Note:**
1. When a call starts, a message appears that states: "By participating in the call, you agree to have your conversation recorded and transcribed." You must click **OK** to continue.
 2. If you try to share video from a participant that has **Remote Video Privacy** settings enabled, then the participant can **Allow** or **Decline** your request to share video. If the **Call Privacy**  icon appears next to the **Hang Up** button within the Right Toolbar, then Call Privacy rules (Settings) are enabled.

Live Video Collaboration Session



Note: If you are unable to connect with the inviter, check the **System Health** of Onsight. If the **System Health**  icon is green, the session should function correctly. If the **System Health** is red, there is a connectivity problem. Try connecting via cellular (without Wi-Fi enabled), or close and restart the application.

Inviter/Remote Expert

The **Inviter/Remote Expert** will lead the discussion and be able to:

1. Control the camera on your device.
2. Start and pause video as needed.
3. Take pictures/snapshots with your camera.
4. Turn on light (Illumination) for your device providing it has one.

Note: The Inviter does not have access to any of your data, files or apps on your phone or computer.

All participants can telestrate (draw) onscreen using an assigned color. When the session is complete, the **Inviter** ends the call. Exit Onsight Connect by tapping the **Logout** button within the **Left Toolbar**.

Tip: Your Onsight invitation will automatically expire after 24 hours that it was sent. You may delete or keep Onsight Connect on your computer/device to support future calls.

