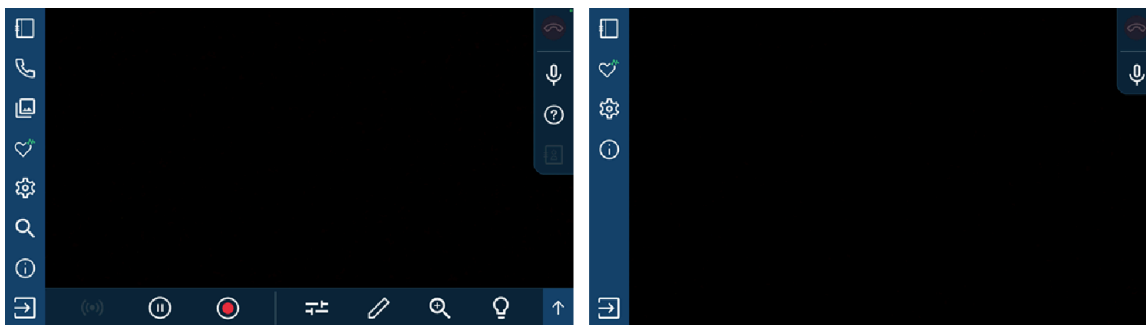


# Onsight How to: Send an External Guest Invite

## OVERVIEW

Sending an External Guest invite enables you to collaborate with contacts that do not have an Onsight account. For example, you may want to have an Onsight video call with a third-party parts supplier to investigate a problem. In this case you can issue a temporary guest account to the supplier.

### What the Inviter Needs to Know



**Figure 1. Expert Mode vs. Field Mode**

If the **External Guest** has prior experience using Onsight Connect, then their **User Mode** can be assigned as **Expert Mode**, where the options to pause a video, take a snapshot, and record video are enabled, and control can be shared by both users.

Alternatively, the **External Guest** can be assigned a simplified version of the Onsight software called **Field Mode**. Field Mode limits the customer to being able to “point and shoot” video and enables basic onscreen drawing capability. The **External Guest** cannot pause the video, take a snapshot, or record video. These functions are only available for the **Inviter**. This means that the **Inviter** is the **Expert** who remains in complete control of the call and leads the **External Guest** to point the camera as needed.



**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

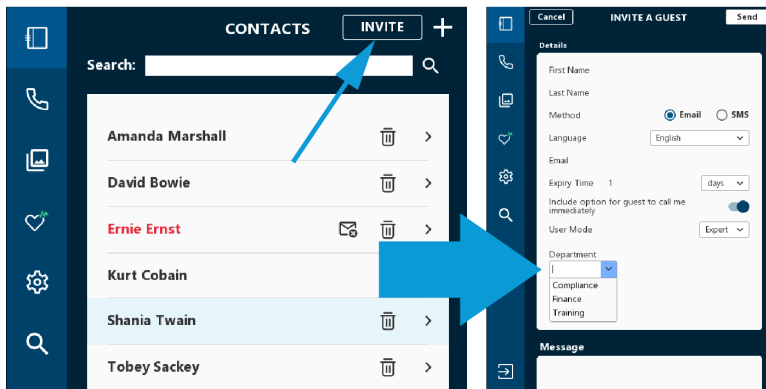
### What the External Guest Needs to Know

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.

- Typically, most functions are controlled by the **Inviter** who can take snapshots, record video/audio and pause video sharing.
- 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.

## Sending an External Guest Invite



To invite an external guest, click **Contacts** and click **INVITE**. Fill in the details on the form and select an invitation method as **Email** or **SMS** (text):

- Enter a **First Name**.
- Enter a **Last Name**.
- Define the **Method** of delivery — Enable **Email** or **Short Message Service** (SMS) as the delivery method.

**Tip:** The option that you select here, will determine whether an **Email** or **Phone Number** field appears in Step 5.

- Languages** — Specify the language for the invitation. Select from English, French, Chinese, Japanese, German, Italian, Portuguese (Portugal and Brazil), Swedish, Russian, and Korean languages.
- Enter an **Email** address or **Phone Number** as determined by your choice for Step 3.

**Tip:** For an SMS number, use the format: (+ Country code, Area code and Number). For example, +447711279795.

- Expiry Time** — Invitations can be set to expire within a defined time frame (Days).

**Note:** Unless otherwise specified, sent invitations will expire after one day.

- Enable the **Include option for guest to call me immediately** when they join.
- Define the **User Mode** as **Expert** or **Field** mode — You can use **Expert** mode for guests with prior OnSight Connect experience and use **Field** mode for guests with limited OnSight Connect experience.

**Note:** The capability to select **Expert** or **Field** mode is controlled by your **Client Policy** settings. Contact your OnSight Administrator to review as required.

**Tip:** When a guest is operating in **Field Mode** and they are sharing/streaming video content, the **Share Video** icon will display as a status indicator, next to the red **Hang Up** icon.

**Note:** User Mode (Expert & Field) only apply to the full client application.

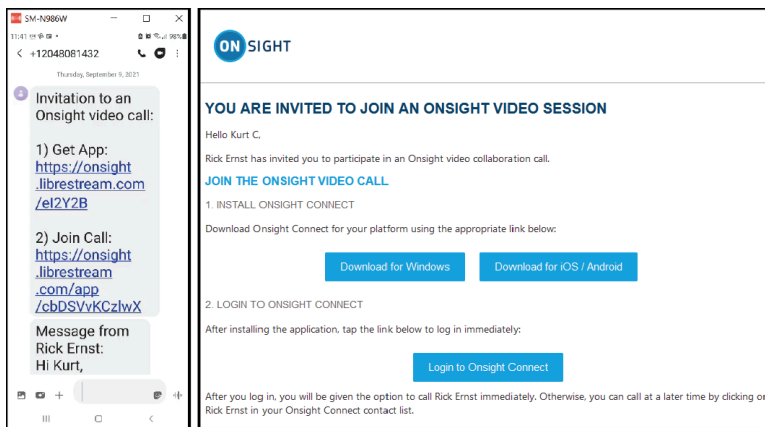
9. (Optional) Select a category from within the **Custom Field** drop-down menus to improve the quality of your reporting data, as necessary.

**i Tip:** Enter text within the **Custom Field** to dynamically filter the list options as you type.

10. Enter an optional **Message** or greeting, as necessary.

11. Click **Send**. A message appears stating that "A guest account has been created for... and an invitation has been sent to ...".

## Receive an External Guest Invite



The External Guest will receive a SMS (Text) or email invitation. The invite contain the instructions on how to **Download** and install the OnSight software and **Login to OnSight Connect/ Join Call** link provided in the SMS (text) or email.

**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).

## 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 > OnSight** and enable **Privacy** settings for **Notifications** and **Permissions**. For **iOS** — Tap **Settings > OnSight** and allow OnSight 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.

## Status Events

A **Status** indicator will usually appear next to the contact's name — A **Sent** icon displays when an invitation is sent; a **Received** icon displays when the invitation has been read; and a **Not delivered** icon appears when the message wasn't received. These icons can display providing these options are supported by your email/SMS provider.

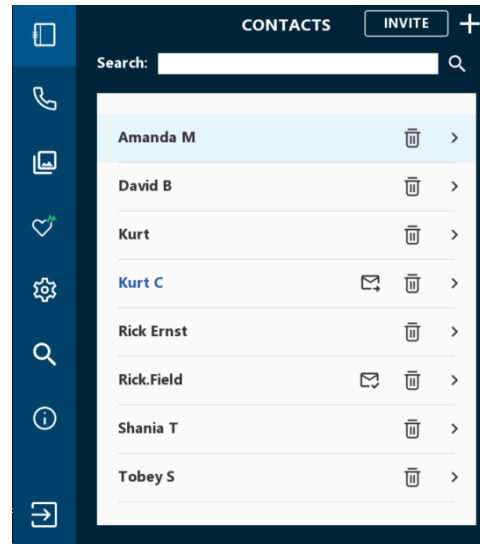
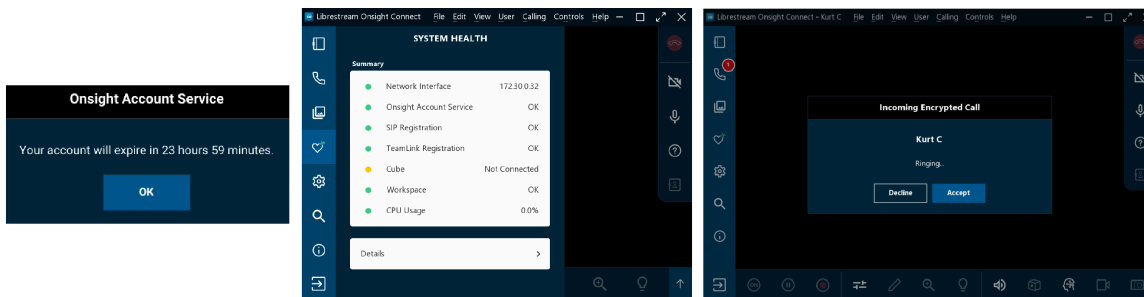


Figure 2. Status Events

## Onsight Automatically Calls the Inviter



## External Guest



### Note:

1. 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.
2. 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.

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.



**Tip:** 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.

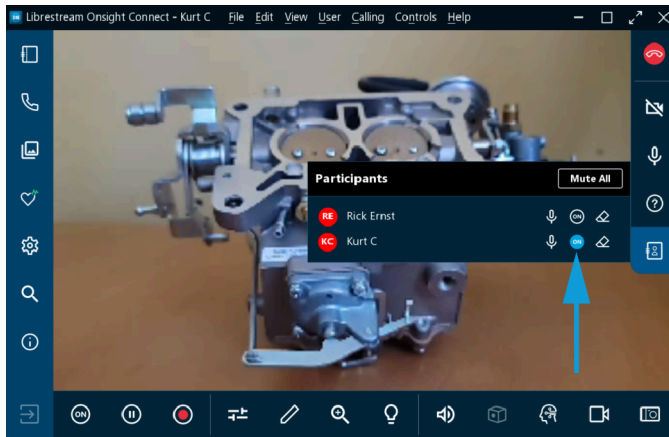
If the customer cannot contact the Inviter, ask the Invitee to check the **System Health** of OnSight. If the **System Health** icon is green, the session should function correctly. If the **System Health** is red, there is a connectivity problem. Try connecting via cellular (without Wi-Fi enabled), or close and restart the application.

## Inviter

When the **External Guest** calls, the inviter will receive a message `Incoming Encrypted Call` and will need to **Accept** the call.

**Note:** 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.

## Start Video Stream



## Inviter/Remote Expert

The **Inviter** (Remote Expert) can select the External Guest's camera by accessing the **Participants** panel within the **Right Toolbar** and selecting the **Share Video** button next to the External Guest's name. The **Share Video** button turns blue to indicate that video is shared.

**Note:** 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.

The Inviter can now control the lighting and zoom of the Invitee's device, as well as perform other functions such as taking snapshots, recording video, or pausing the video.

When you have completed your collaboration, you can end the session by clicking the **Hang Up** icon within the **Right Toolbar**. Click **File > Exit** to log out and close the application.

**Note:** If you select **Log Out**, Onsite continues to run in the background

## Notes:

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