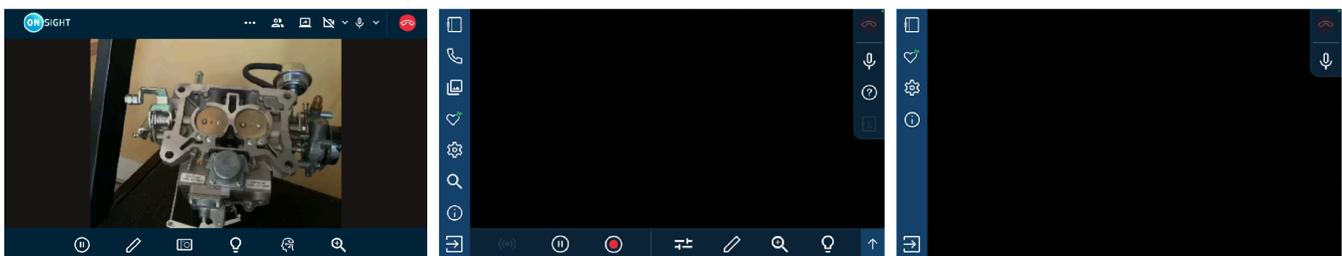


# Onsight Web App How To: Send an External Guest Invite

## 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 for **Onsight Connect for Web**, or the full client **Onsight Connect**.

### What the Inviter Needs to Know



**Figure 1. Onsight Connect for Web, Onsight Full Client: Expert & Field Mode**

For full **Onsight Connect** clients, if the **External Guest** has prior experience, 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.

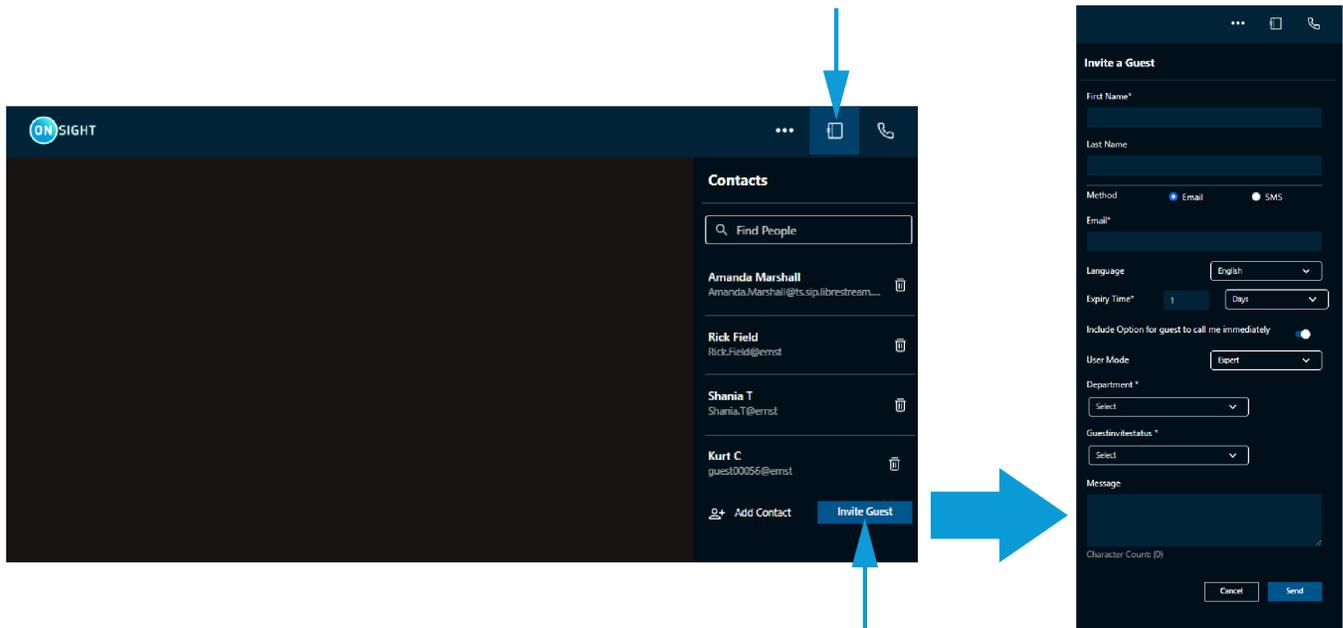
Alternatively, the **External Guest** can be assigned a simplified version of the Onsight software called **Field Mode**. Field Mode limits the customer to being able to “point and shoot” video and enables basic onscreen drawing capability. The **External Guest** cannot pause the video, take a snapshot, 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

# Sending an External Guest Invite from the Onsight Web App



**Figure 2. Invite Guests**

In this task, you will use the **Onsight Connect Web App** running on a PC, Android, or iOS within an approved web browser to send a guest invitation. To invite an external guest, tap **Contacts** from the **Main Menu** bar and tap **Invite Guest**.

1. Enter a **First Name** <sup>\*</sup>.
2. Option — Enter a **Last Name**.
3. Determine the method for delivery for the guest invite. Choose from:
  - **Email** <sup>\*</sup> or
  - **SMS** <sup>\*</sup> (Country code + area code + phone number)
4. Depending on your selection for Step 3, please enter the:
  - **Email** <sup>\*</sup> address or
  - **Phone Number** <sup>\*</sup>
5. **Language** — Specify the language for the invitation. Select from Chinese, English, French, German, Italian, Japanese, Korean, Portuguese (Portugal and Brazil), Russian, Spanish, and Swedish languages.
6. **Expiry Time** — Invitations can be set to expire within a defined time frame (Days or Hours).

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

7. **Include option for guest to call me immediately** — Enable this option to allow the guest to call you immediately.

**Note:** This setting only applies to the native clients. Onsight Connect for Web users must click the **Call** button to start a call.

8. **User Mode** — If the user will be using **Onsight Connect** for the full client, then you may want to specify the user mode for the user. Select from:
  - **Expert**
  - **Field**

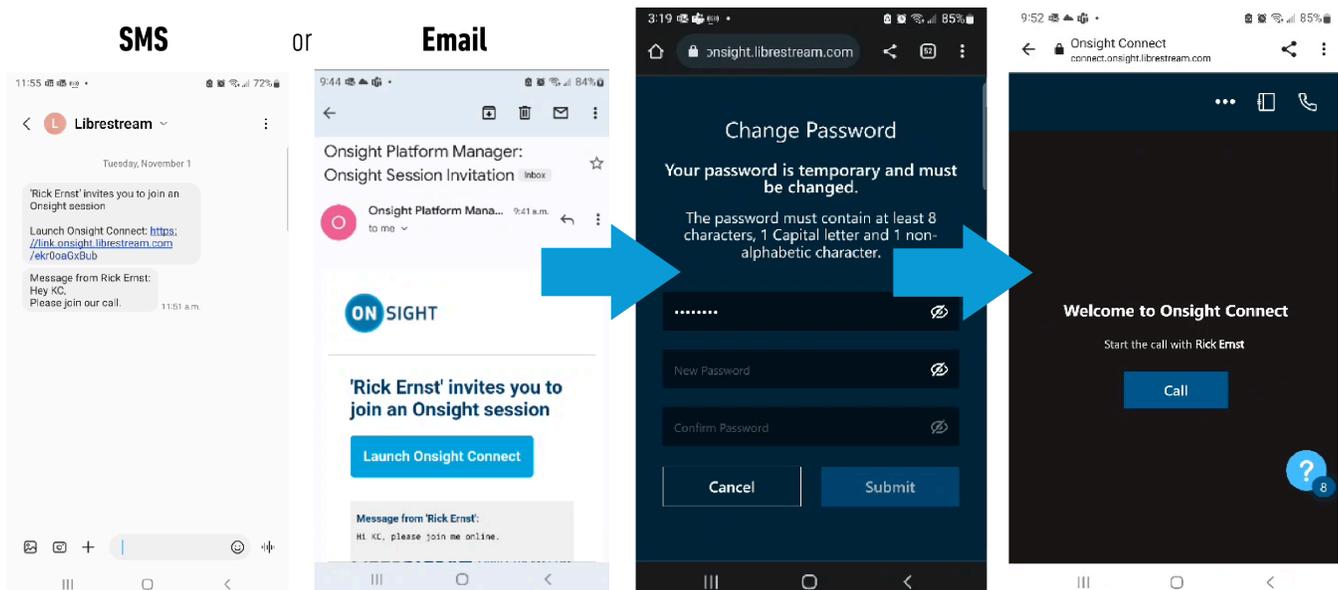
<sup>\*</sup> This is a required field.

**Note:** Define the **User Mode** as **Expert** for guests with prior Onsight Connect experience and use **Field** mode for guests with limited Onsight Connect experience.

9. Option — Select a category from within the **Custom Fields** drop-down menus to improve the quality of your reporting data, as necessary.
10. Option — Enter a **Message** or greeting.
11. Tap **Send**. A message appears stating that "A guest account has been created for... and an invitation has been sent to ...".
12. The guest account appears near the bottom within the **Contacts** list. You can tap the **Status indicator** icon to review the status for the invite. This completes the procedure.

## Receive an External Guest Invite

### External Guest — Login to the Web App and Join a Call



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

1. Access the invitation and tap the link to join the call — The login process is automatic, however first-time users may be required to change their password.

**Tip:** The link uses **Intelligent linking** to launch the web app or the full Onsight Client, if installed.

2. Tap the **Call** button to join the call.
3. Once Onsight launches, it will login automatically. A message appears that states: "Your account will expire in XX hours XX minutes." Click or tap **OK** to initiate the call.

**Note:**

- a. If a custom message appears during login that prompts you to agree to terms and conditions, you must tap **OK** to indicate compliance in order to advance.
- b. If you are asked for permission to access your microphone audio, camera pictures, device's location etc., tap **OK, Allow** or **Yes**, as necessary.

 **Tip:** If the device keyboard takes up too much space onscreen, and if Auto-rotate or Rotation Lock is enabled, consider changing your device's orientation from landscape to portrait.

4. When the **External Guest** calls, the inviter will receive a message `Incoming Encrypted Call` and will need to **Accept** the call.
5. Typically, most functions are controlled by the **Inviter** who can take snapshots, record video/audio and pause video sharing.
6. The **External Guest** can pause video sharing, annotate (Draw) onscreen, zoom-in or out, enable lighting for the camera (If available on the device) and take a picture.
7. 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.

 **Note:**

- a. **iOS** users only — After calling the inviter and completing the call, please keep the web browser with the web app open and in the foreground. If the web app browser is in the background, it will log you out of OnSight. Access the invite link to relaunch the web app to receive or initiate a call.
- b. For the **inviter** — if you receive a message that states "*Client not available*", then request that the iOS user access the invite link to relaunch the web app, to receive or initiate a call.

8. When the session is complete, the **Inviter** ends the call. Exit OnSight Connect for Web by tapping the **More Actions**  and select **Logout** .

## Device Permissions

 **Note:** For mobile devices, permissions can be modified 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.

## Data Privacy

 **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.

## Notes:

---



---



---



---

### Related information

[Support](#)  
[Just-in-Time Training Materials](#)