



Setting up custom processes

Custom processes allow you to collect extra information from your visitors or create a more complex check-in process.

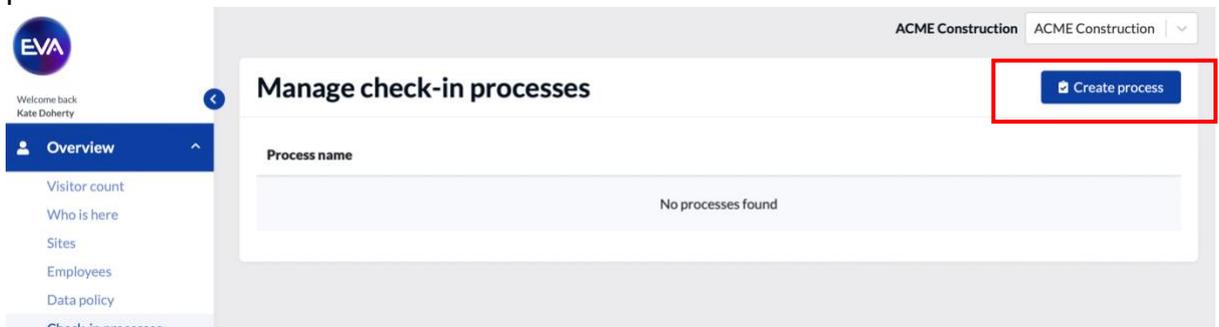
- Create extra fields and screens so you can capture the data you need, either on or before arrival.
- Processes can be different for different types of visitor (eg staff, contractor, walk-in).
- Apply processes organisation-wide or just to specific sites or zones.
- Remember a visitors' check-in details for a specified period of time (eg once they have completed a site induction, it remains valid for 12 months).

Custom processes is an add-on feature, charged per site. [View pricing.](#)

How to build a custom process, step by step

Step 1 – create and name your custom process

1. Go to **Overview > Check-in processes > Create process** and give your process a name



2. Add an arrival screen

Arrival screens

- Site health and safety ^
- Select visitor type ^
- Enter details ^
- + Add arrival screen**
- Meeting with ^
- Welcome ^

3. Click the arrival screen you've just created, and click **Edit screen** to
 - a. give it a name (eg Contractor induction)
 - b. select the visitor type(s) who should see this screen (or leave blank if it's relevant to all visitor types)

Edit screen

Screen name

Contractor induction

Screen visitor types ⓘ

Contractor x | x | v

Remove screen

Close

Click **Close** to complete this step.

- Click **Add field**, then click **Edit** to create a field for collecting the information you need. Edit the field to suit, with introductory text, a field type and label.

Edit field

General
Advanced

Introduction text/content ?

B *I* ~~S~~ {}
☰ ☰
🔗 🔗
Normal ▾
✉

All contractors must hold a Site Safe passport.

Field type

Text ▾

Label

Site Safe passport number

- Optionally, select field options:

- Pre-fill** – field will be pre-filled next time the contractor checks in
- Staff to complete** – use this if your staff need to verify something about the contractor in person, eg they have approved PPE
- Required**

Field options

- Pre-fill ?
- Hide if pre-filled ?
- Staff to complete ?
- Required

Note: you can also use a certificate to remember Contractor check-in details – see pp9-10 of this guide.

- Specify check-in rules – what will happen to the check-in status depending on the answer to the question. In this example, if the Site Safety passport number is not provided, the check-in status will be Amber (see Step 2 below for more info).

Check-in rules ?

Is not empty Green Amber Red

Is empty Green Amber Red

7. Close the **Edit field** dialog and you'll see your new arrival screen with the question you've created.

Contractor induction

Contractor

All contractors must hold a Site Safe passport.

Site Safe passport number

Edit

Edit screen Add content Add field

8. You can add more fields/questions to the screen using the **Add field** button – repeat steps 4-6 above.
9. Scroll to the bottom of the screen and click **Save**. Your new process has been created.
10. You can also add multiple screens as part of a single check-in process – eg one screen for health and safety questions, another for emergency contact details.

Step 2 – check your messages

Scroll down to the **Completion messages/options** section to review and edit messages displayed to your visitor – eg when their check-in has an amber/red status:

Edit process > Building site induction

Completion messages / options

The on-arrival message for a green check-in status is controlled by the **Welcome message** setting on the **Site information > Options** page under the **Check-in** tab

Arrival message - Amber check-in status

Please see receptionist / facility staff to complete this check-in.

67 / 512

Arrival message - Red check-in status

Please see the receptionist / facility staff. There is a problem with the information you have provided.

104 / 512

Step 3 – Add your process to a site’s check-in

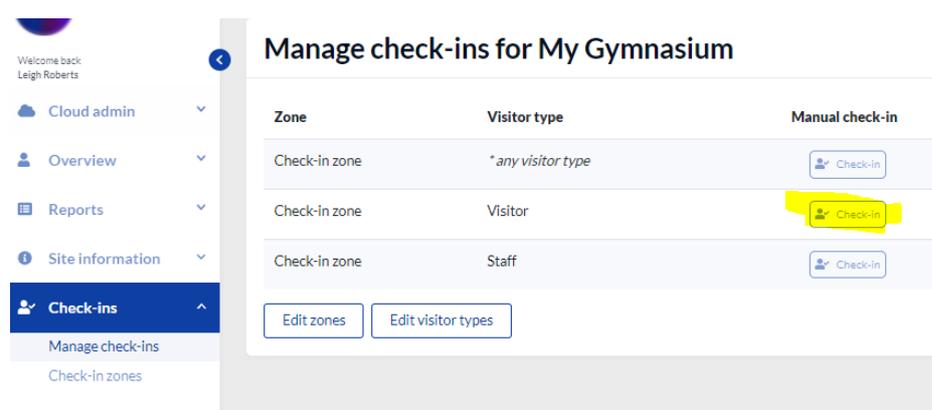
1. Go to **Site information > Options**. At the bottom of the **Check-in** tab you can select your new process.
2. If you’re not already using Custom processes, you’ll need to first select **Enable check-in process feature**. Note that this will incur an extra charge ([see pricing](#))



3. Click **Save**

Step 4 – Test your process

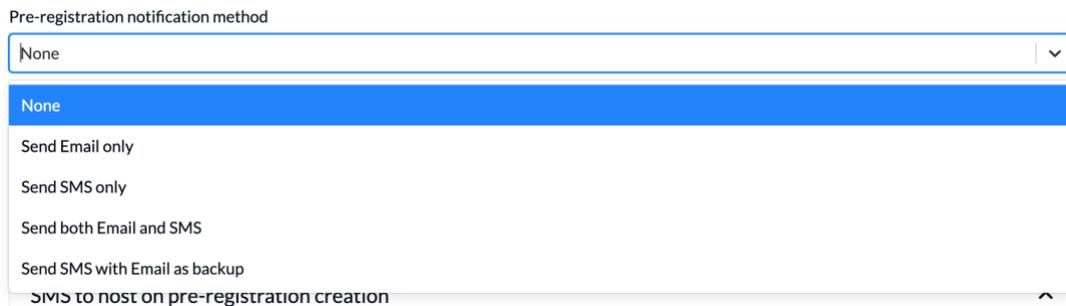
Go to **Check-ins > Manage check-ins** and use **Manual check-in**



Collecting information from visitors before they arrive

You can collect information from visitors and contractors before they arrive onsite using pre-registration.

1. Create a custom process (step 1.1 above)
2. Instead of adding an arrival screen (Step 1.2 above), add a **pre-arrival screen**.
3. Go to **Site information > Options** to check your notification settings. Pre-registered visitors can be notified by email, SMS or both (extra charge applies for SMS notification).



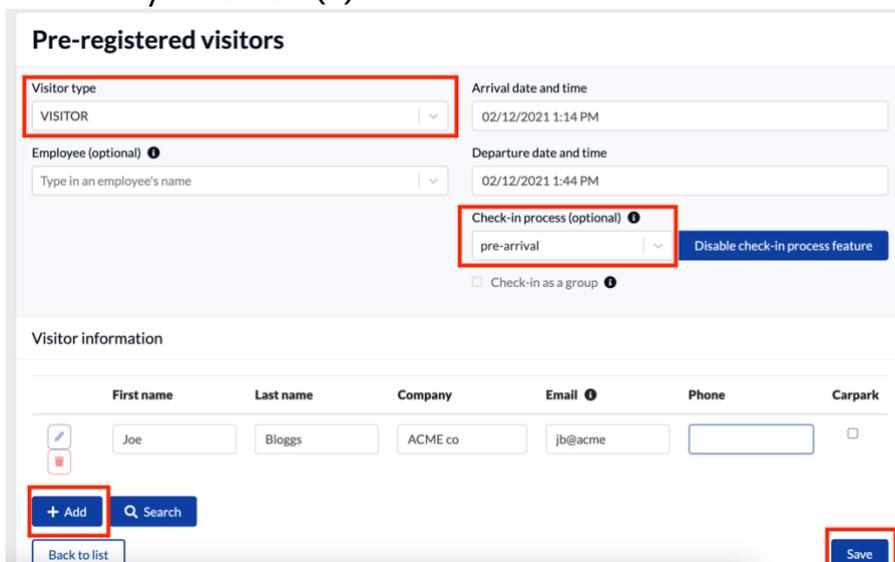
Pre-registration notification method

None

- None
- Send Email only
- Send SMS only
- Send both Email and SMS
- Send SMS with Email as backup

SMS to not on pre-registration creation

4. Go to **Visitors > Pre-registered visitors** to send invites to your visitors. Select the relevant visitor type and the check-in process you've created, and add your visitor(s).



Pre-registered visitors

Visitor type: VISITOR

Arrival date and time: 02/12/2021 1:14 PM

Employee (optional): Type in an employee's name

Departure date and time: 02/12/2021 1:44 PM

Check-in process (optional): pre-arrival

Disable check-in process feature

Check-in as a group

Visitor information

First name	Last name	Company	Email	Phone	Carpark
Joe	Bloggs	ACME co	jb@acme		<input type="checkbox"/>

+ Add Search

Back to list Save

5. When you click **Save**, pre-registrations will be sent to your visitors using the method specified in #3 above.
6. It's also possible to send pre-registrations automatically via Microsoft Outlook meeting invites – [more information on our Outlook add-in](#).

FAQ about custom processes

What can I use custom processes for?

Custom processes are flexible and can be used in lots of different scenarios, including:

- Induction processes – displaying information and maps, collecting evidence of certification
- Visitor survey – eg for a transport audit
- Competition – capture extra details from your visitors to enter them into a draw/competition
- Collecting essential information before an appointment or visit – eg vaccination status, registration number, accessibility or parking requirements

How much does it cost?

There is an extra per site cost when custom processes are enabled – an additional monthly charge of :
NZD 25 per site (+gst) for your first 5 sites, and NZD 5 (+gst) per site thereafter.

Pricing for non-NZ customers:

USD 20 per site for your first 5 sites, and USD 4 per site thereafter.

Is it possible to create one process and enable it for multiple sites?

Once you have created a process, you need to enable it on each site you'd like to use it. For each site:

- Go to **Site information > Options**. At the bottom of the **Check-in** tab you can select your new process.
- If you're not already using Custom processes, you'll need to first select **Enable check-in process feature**. Note that this will incur an extra

charge ([see pricing](#))

Default check-in process ⓘ

Vaccination status

Enable check-in process feature

- Click **Save**

What happens if a visitor doesn't pass arrival checks?

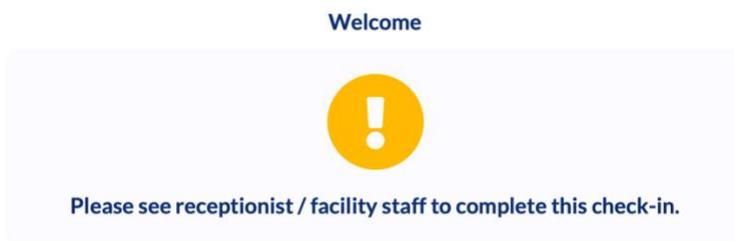
If you have set up check-in rules that could return an amber or red status depending on the result, you can specify the messages sent back to visitors in those cases:

Check-in rules ⓘ

Is not empty Green Amber Red

Is empty Green Amber Red

For example, a Site Safe pass number is not provided (ie field is empty), so the contractor's check-in is Amber and they are referred to reception to complete their check-in:



The administrator/receptionist will be notified by email, and they can also review the check-in on the **Who is here?** Report:

Audit log custom	Profile custom	Party size	Check- in status	Check in method
*****	*****	1		Manual
*****	*****	1		Manual

The receptionist can then click on the amber status icon to manually approve or decline entry.

It's also possible, if you're using host notification, to send any amber/red answers to check-in questions to the host so they are aware – see **Completion messages/options** section of the **Edit process** screen.

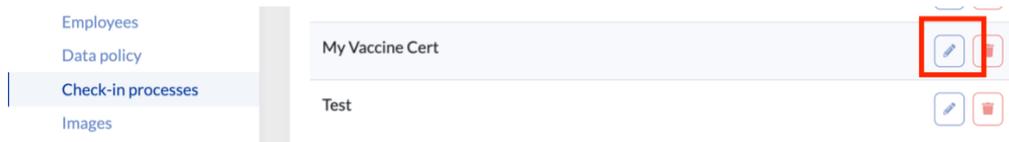
- Show 'check-in another person' button 
- Show 'add a family member' button 
- Show 'check out' button 
- Include answers in host notification 

Does a regular visitor/contractor have to complete the process every time they check in?

EVA Check-in can be set up to 'remember' valid answers to check-in process questions. This can be useful for regular visitors/contractors.

There are two ways you can set this up.

1. Select the pre-fill options when you set up the field – see #5 on page 3 of this guide.
2. Set up a group of check-in screens and responses as a Certificate with an expiry date. The visitor will not then be asked those questions again until the certificate expires. Here are the steps to do this:
 - a. Once you have set up your custom process, go to **Overview > Check-in processes** and **Edit** the process you created



b. Scroll to the bottom of the page and click **Add certificate**

Certificates



c. Give the certificate a name.

d. Select the first and last screen (which can be the same if just one)

e. Select an Expiry date increment (ie days/months/years) and value

Certificates

Vaccinated - Pass Verified

Certificate name *i*
Vaccinated - Pass Verified

First certificate screen *i* Last certificate screen *i*
Vaccination Status Vaccination Status

Expiry based on *i*
Field

Expiry value *i*
0

Expiry date field *i*
Vaccination Status - My Vaccine Pass expiry field 1

f. Click **Save**.

What happens if a visitor has not completed the pre-arrival process?

If a visitor arrives onsite to check-in and has not completed their pre-arrival steps, they will be able to complete it onsite.