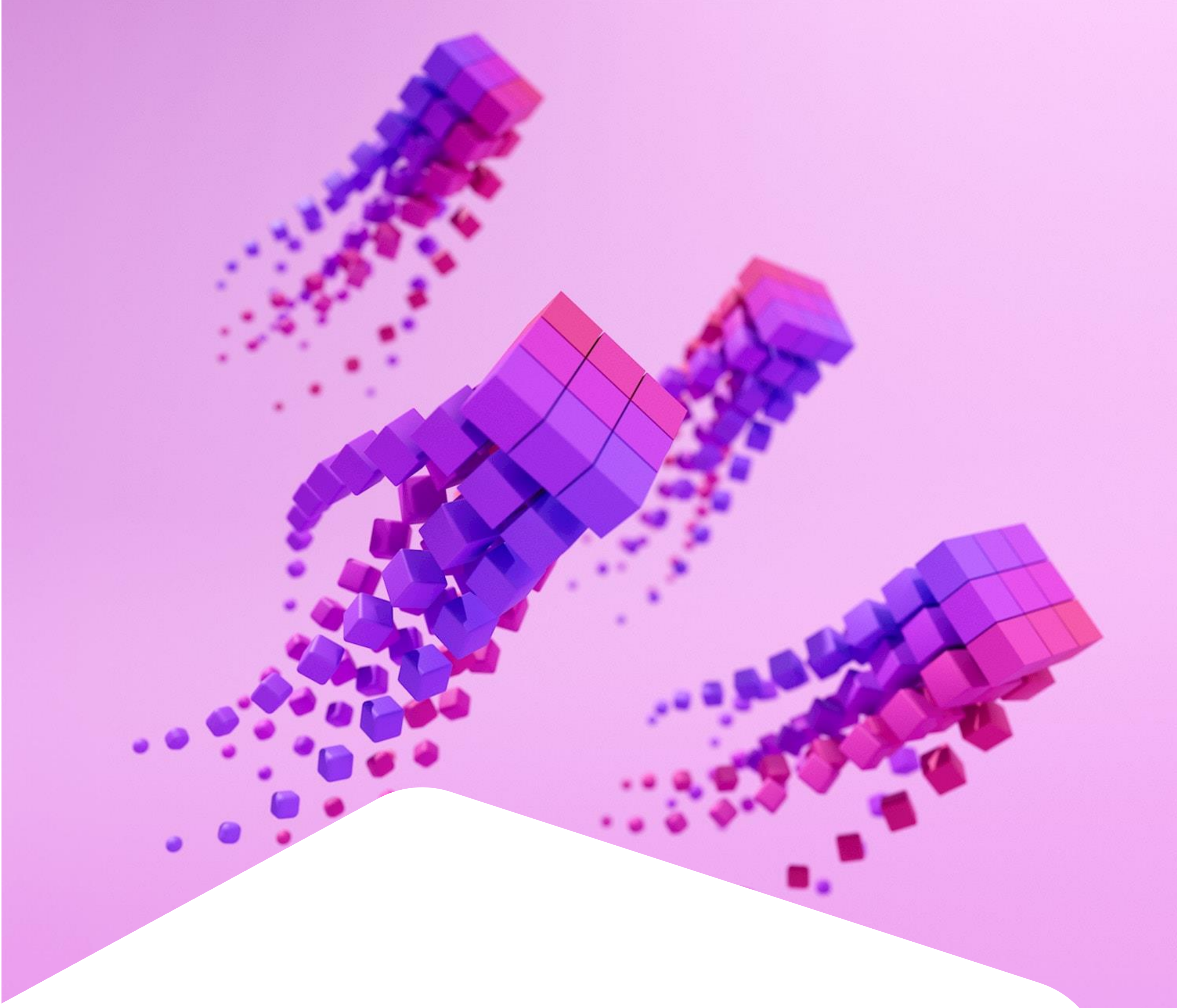


# INTEGRITY LINE GETTING STARTED GUIDE

Go Live

# Table of Contents

Welcome to EQS Compliance Cockpit! This guide will walk you through each step to review your Integrity Line and start receiving and managing cases.

This guide is written specifically for Convercent upgrade customers. Throughout this PDF you will find a link to the home page of the EQS knowledge base. There, within the knowledge base, we have created a very similar version of this guide for all customers – including you – that has more specific, clickable links embedded throughout the document.

Click here for the EQS knowledge base. See section 1.2 below for more information about the knowledge base and how to register.

### *How do I ensure continuity and make sure my Integrity Line is live right away?*

We have replicated your configurations from Convercent to the EQS Compliance Cockpit! Your top priority actions are listed below – your job is to activate your account, review the configurations, and start to get comfortable with the new interface.

To help you learn your new system in relation to Convercent, we have provided a **migration configuration guide** that includes a glossary of terms and a summary of the configurations that we have migrated.

### *What if I want to take this opportunity to update or change my helpline configurations?*

Visit our **Learn More Guide,** which will walk you through the migrated Integrity Line features with guidance on how to make updates. If you're *still* interested in enhancing your new tool, visit our **New Features Guide** for even more information on new features not previously available to Convercent customers.

# *1. Going Live*

### These are the required steps for accessing your account and making sure everything is live.

## *1.1. Sign in to your user account in Compliance Cockpit*

Upon go-live, ALL your users from the Convercent User Manager migrated to the Data Center.

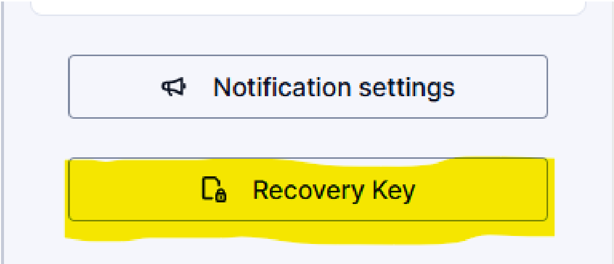
01. You will receive an email to activate your account and create a password. You must take action within 72 hours or else the link will expire.

02. Please note: For most customers, the **username** associated with your Convercent account matches the **email** associated with that same account. If your username in Convercent did not match your company email; **note** you will still sign into Compliance Cockpit with your email not your previous username. If you are having trouble signing in, please contact support or your EQS consultant for help.

03. Download your Recovery Key

***CRITICAL: DO NOT SKIP THIS STEP - Losing access to your account without a recovery method in place will result in permanent data loss. The system does not allow EQS Support to trigger a password reset, making it impossible for our team to recover a locked account.***

a. Once signed into Compliance cockpit, navigate to your profile settings by clicking on your username in the upper right-hand corner.
b. Click on Recovery Key




c. Then follow the prompts to download your recovery key, save somewhere safe, and ensure continued access to your integrity line solution.

Now that you have saved your Recovery Key, you have fully activated your account! **Don't forget to bookmark** https://compliance.eqscockpit.com/ for easy access to the Compliance Cockpit.

## Password Recovery

This application **does not** support password recovery methods such as security questions or Support-assisted password resets. Instead, there are only two ways to recover access:

01. **Recovery Key File** – During account activation, you must download and print a **Recovery Key**. This is the only way to reset your password if you lose access. Store it in a secure location.

02. **Another Active Admin User** – If there is a second Compliance COCKPIT user with access to the Data Center in your system, they can assist you in resetting your password. When you request a password reset, the second user will get an email, and they can click through to approve the password reset.

## *1.2. Register for the Knowledge Base and Support Resources*

01. You will find our full knowledge base at https://helpdesk.eqs.com/en-US/SignIn.

02. Register for an account by submitting your email and creating a password.

    a. Register here: https://helpdesk.eqs.com/en-US/Account/Login/Register.

***Note - This is a separate log-in from your Compliance Cockpit username and password.***

03. Support Queries are submitted through HelpDesk as well.

04. **Bookmark the URL** so that you can easily access the knowledge base and reach out to Support when needed!

## *1.3. Locate your Webintake (Landing Page) URL*

01. Within Compliance Cockpit, open **Integrity Line** from the top left navigation menu.

02. Click on the **Configuration tab**.

03. On the left side, under the Webintake section, click on **Text editor**.

04. This page shows your landing page URL! In Integrity Line, this is called a **Webintake**. The format is companyname.integrityline.com.

05. Ensure you get IT resources involved early and complete step 1.6 below if you utilize any vanity URL's or 301 redirects.

## *1.4. Review your Webintake (Landing Page) and Intake Form*

01. Once you have found your Webintake URL; click on that link to read each section and click through the boxes to explore the page.

    a. If needed, you can make *text* edits by entering edit mode. Once you're within the text editor, right click on text to edit your web intake main page and subsequent pages.

        i. Click here to watch a video on finding your Webintake URL and making updates to your landing page.

02. Visit the **Learn More** guide or the Knowledge Base for more information on updating translations via text editor as well.

***Note: Text can be edited within the rich text editor, but if you would like to make changes the branding of your Webintake, please contact support or your EQS consultant.***

03. Click on Make a Report to view the intake form.

***Note - The options under the "Where did this incident occur?" question on the first page of your intake form mirror the available Country selections configured in Convercent or otherwise indicated by your team on the configuration form. If you do not see this question, then it means that your Convercent intake did not require a country selection. We have mirrored the Convercent reporter experience in your new instance by only associating the intake form to one Country.***

***Also Note - If you used Geography Rules in Convercent, we have recreated that configuration by creating a Standard Form for each country/region as needed. They will be clearly labeled.***

04. The existing country options (or lack thereof) can be updated within the form settings. See the **Learn More** guide or the Knowledge Base for more information on how to update.

05. The subsequent form questions can be updated via the form editor. See the **Learn More** guide or the Knowledge Base for more information on how to update.

06. If any updates have been made, go back to your Webintake landing page, and refresh the page to verify that the intake channel is now functioning as expected.

## *1.5. Access Case Management*

01. Within Compliance Cockpit, open **Integrity Line** from the top left navigation menu.

02. On the Cases tab you will find a table that you can filter and sort to manage your cases. Compliance Managers will only see the cases that they have access to, as determined by their user role.

03. To review how your Case Management configuration in Convercent has been replicated, see the **Glossary of Terms migration configuration guide** for more detail.

04. Visit the Knowledge Base to find a full manual on case management.

# 1.6. Submit internal requests for IT and other internal updates

01. Vanity URL Redirect

    a. If your company uses a vanity URL for your helpline, such as www.companyname.com/ethicsline, submit a request to your IT team to have the vanity URL updated to redirect users to your new Integrity Line Webintake (landing page) URL identified in Step #1.3.

    b. If you are not using a vanity URL redirect, make sure to update your Helpline URL in publicity materials. The Convercent URL format is https://app.convercent.com/en-US/LandingPage/7353d7bb-d168-ec11-a989-000d3ab9f011.

02. Single Sign-On (SSO)

***Note - If multifactor authentication was requested for your Integrity Line configuration, SSO cannot be enabled. You can skip this step in the guide.***

    a. If your Convercent account uses single sign-on, you can enable it in Compliance Cockpit as well. To do so, follow these steps:

        i. Create a user account for IT.

        ii. IT: Log into EQS Compliance Cockpit.

        iii. IT: Click the gear icon in the top right to open the settings sidebar.

        iv. IT: Click on SSO Configuration.

        v. IT: Download the SSO manual as needed and provide to your internal IT user to configure SSO.

# 1.7. You're Live!