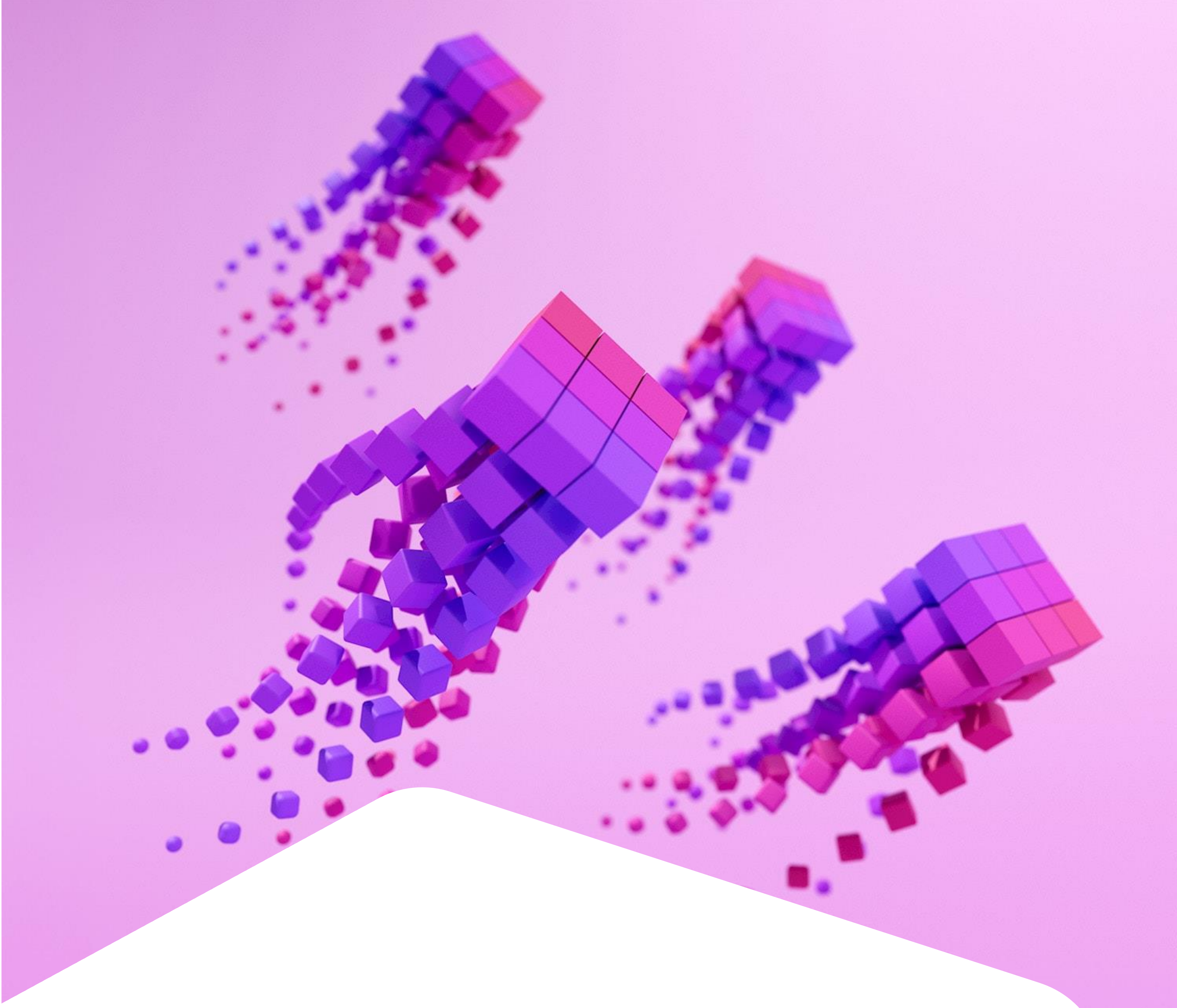

INTEGRITY LINE
GETTING STARTED GUIDE

Learn More

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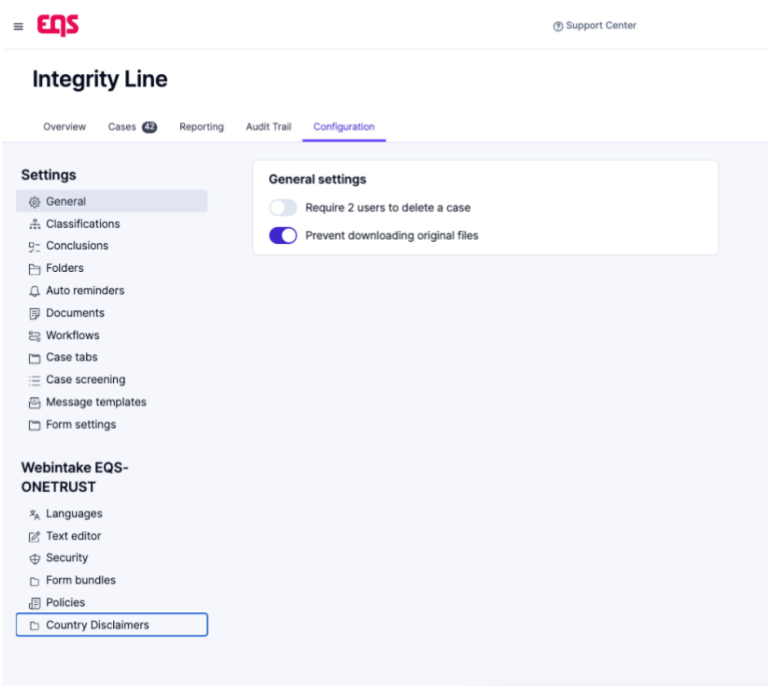
1. Learn More

Once you have completed the steps in the **Getting Started Guide**, you can be confident that you will not experience down time. If you're still interested in learning more, see the below information to guide you through any configuration updates that you may want to make to your new Integrity Line.

The below walks through the left side navigation bar within Integrity Line's configuration tools. We specifically focus on how the features correspond to Convercent features. For features available in Integrity Line not outlined below, they are **new** to Convercent customers!! Once you have mastered your migrated functionality, see our **new functionality guide** for even more detail on improving your Integrity Line.



Note -If there are features outlined in either guide that you do not see in your Integrity Line configuration menu, those features may not be included within your subscription tier. Please contact your Customer Success Manager or support for additional information.

1.1. Integrity Line - Settings

For more information about all of the items in Settings, visit the Knowledge Base and look for the Integrity Line —> Configuration of Integrity Line —> Settings.

01. General

02. Auto-Reply: This toggle enables an automatic response to the reporter after a case is submitted. If you had an automated response message configured in Convercent, this has been enabled for you and the automated message has been configured to mirror your Convercent message.

03. Classifications

    a. Classifications correspond to Issue Types in Convercent. We have recreated your Convercent issue types as Classifications in your Integrity Line configuration.

    b. You can click "Create" to add a classification. You can also modify or remove classifications by using the pencil or trashcan icons on the far right.

04. Conclusions

    a. Conclusions correspond to Resolution Type in Convercent.

    b. You can click "Create" to add a conclusion. You can also modify or remove conclusions by using the pencil or trashcan icons on the far right.

05. Folders

    a. Folders are only configured in your account if they are required to replicate your configurations from Convercent.

        i. If you route reports in Convercent based on issue type, country, location, department, or Business unit folders are not needed. Custom user roles can be created to allow certain roles to only access cases with the above attributes. However, if you routed cases based on a custom data point in Convercent, then folders, a folder routing question, and custom roles were created to replicate this.

    b. If folders are not currently being used, you can create folders to group cases and apply more granular permissions as needed.

06. Workflows

    a. If your team utilized custom status' in Convercent, these were recreated as Steps within a workflow.

07. Visit the **New Features guide** to learn more about a more in depth use case for Workflows.

08. Case Tabs

    a. Severity and Tags have been recreated as custom questions in the Integrity Line. In addition, any custom case manager fields configured in Convercent have been recreated here.

    b. You can easily edit the custom tabs already created, add additional tabs, reorder custom tabs within this configuration section.

    c. Please note that if you used issue required field in Convercent, most of those were recreated by making fields within custom case tabs required. Not all fields in Integrity Line can be "required" the same way they were in Convercent but see the New Features Guide linked above for more detail on how to utilize case tabs **and** workflows to ensure all cases follow the same process.

09. Case Screening

10. Escalation rules from Convercent were migrated to this case screening section. Here you can create additional rules to route sensitive cases or limit access to cases based on key words.

11. Message Templates

    a. Message Templates correspond to Message Board Templates in Convercent.

        i. The auto-response that a reporter receives after submitting a case is configured in general settings in Integrity Line (see 01 in this section).

    b. If you had Message Board templates configurated in Convercent these have been replicated for you here.

12. Form Settings

    a. Form Settings allow you to make some changes to the contact information fields that are requested for the reporter. This could previously be modified via each intake channel in Convercent but is managed at a global level for all forms in Integrity Line. This updated to reflect the most common use case in Convercent.

1.2. Integrity Line - Web Intake

As you get started with Integrity Line, you may see more than one Webintake section, each will be clearly labeled. For example, if your Integrity Line program accepts reports via call center, then you may see a separate Webintake dedicated to call center so that the reporting method can be identified. Check with your Integrity Line admin if you have questions about the purpose of additional Webintakes.

Note - Each of the settings below are specific for each Web Intake within your EQS Integrity Line. As you make configuration changes, make sure you are working within the appropriate Webintake and, when necessary, you make changes to BOTH webintakes.

For more information about all of the items related to Web Intake, visit the Knowledge Base and look for the Integrity Line —> Configuration of integrity Line —> Web Intake Settings.

01. Web Intake Languages

    a. As a Convercent upgrade customer, you may see Web Intake languages and translations. Learn more about managing and adding translations in the knowledge base.

Note - If you add additional languages, please review your Web Intake page, all forms, and country disclaimers carefully to ensure that the translated text shows the terminology that you expect and need.

02. Text Editor

   a. This tab is where you can find your landing page URL; your landing page has been configured to match your Convercent Landing Page.
   b. This tab is also where you can change text on your landing page. Click on Edit, and then right-click on any text sections that you want to edit. Right clicking will open a pop-up modal that includes a rich-text editor.
   c. Each pop-up text editor will also allow you to modify translations by selecting the applicable language in the drop down and making subsequent updates.

03. Form Bundles

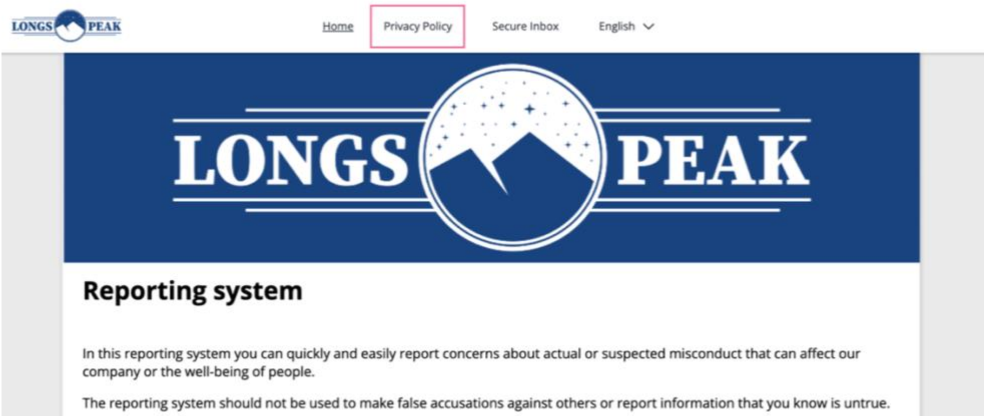
   a. Form Bundles are equivalent to Intake Channels in Convercent. Find your intake channel(s) within each form in the Published section.

Note - Each form bundle must be linked to a web intake tile on your landing page. For the upgrade, your consultant has created each form bundle to correspond to your Convercent helpline configuration. If you determine that you need an additional form bundle, you can create one in your account, but you will also need to contact Support for assistance with a new tile that can be linked to the second form bundle.

   b. Form Settings - Click on the gear icon to make changes to form settings.
      i. Geography Rules in Convercent created a varied intake experience based on country/region. This same experience is recreated in Integrity Line by creating different Forms for different countries.
      ii. If you update countries here, the country disclaimers will also need to be updated. See the Country Disclaimer section below for more info.
   c. Editing Form Questions - Click on the pencil icon to view the fields and questions that are present on each form.
      i. You can edit the question text, drop down items, and translations all within this section!
   d. To learn more about customizing a form, visit the Knowledge Base.

04. Policies

   a. This is an optional feature for privacy policies. If you had a privacy policy in Convercent, we have added that for you here, and you will see a link in the header of your landing page. If you did not have a privacy policy configured in Convercent, then we have removed the link from your landing page, and you can ignore the template policy contained under this tab. If you would like to learn more, visit the Knowledge Base and reach out to Support to have the header link restored.



Note - You can also require attestation to policies upon intake (by configuring a policy attestation question). Policy attestation questions were not enabled for call center customers; we do not recommend this approach as it will require call center agents to read the entirety of the privacy policy before proceeding.

05. Country Disclaimers

    a. These correspond to Terms & Conditions in Convercent. When a Country Disclaimer is configured, there will be a pop-up after that country is selected. When there is no disclaimer configured for a country, there will be no pop-up after selection. If you want to show terms and conditions for all countries, you must make sure that these are configured.
    b. We've mirrored the terms and conditions text from Convercent. To make changes to this text, please learn more about country disclaimers in the Knowledge Base.

1.3. Data Center - User Management

Your users in Convercent were migrated to the **Data Center**. See below for information on how to create more users and how to review the Roles/Permissions that were migrated for you. For even more information about all of the items related to Data Center, visit the Knowledge Base and look for the Data Center.

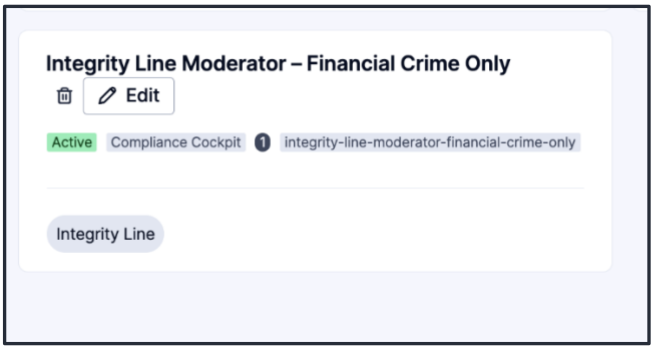
01. **Create Users:** Within Data Center, from any tab, you can create users by clicking "Create" or "Import users" in the top right corner. **Make sure to assign them the correct user role in the Active Roles field**.

For more information on adding users review the "Manually create new users" article under the Data Center —> Data Center Global section of the Knowledge Base.

02. In Convercent, your case access permissions were determined by two settings – User Account Permissions and Notification Profiles. In EQS, case access is managed through comprehensive role assignments in the **Roles & permissions** tab.

a. Roles have been created here to match your permissions and notification profiles in Convercent.

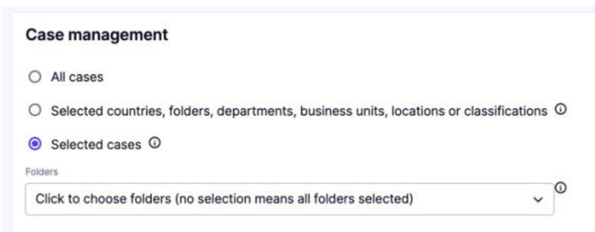
b. This screenshot shows an example of a variation of the Moderator role that will only give users access to cases that have the Financial Crime classification. You can click into each role to see modules they have access to, the actions those users can complete, and the attribute-based permissions, if applicable.

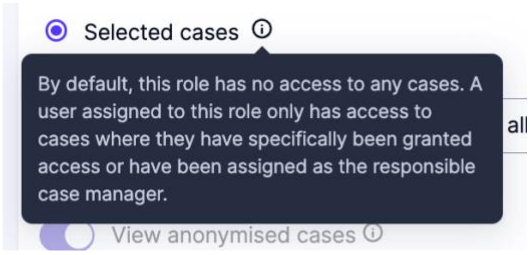


03. You can modify a specific user role by navigating to the user's profile and adding/removing the roles within the “Active Role” drop down.

   a. Visit the Knowledge Base for more information on using User Roles for routing cases and on updating and creating additional custom user roles.

04. Assigning a **Moderator** to a specific case: The Moderator role in Compliance Cockpit is limited to see “Selected cases” only. By default, a user with this permission has no access to any cases. Another admin, who has access to cases, can manually add them to a case they need to review.





   a. Within a case, open the **User access** panel and scroll to the bottom to find the section that shows **Users without access to this case due to their role**. This is where you can grant access to users who have the Selected cases permission.

1.4. Data Center - Attribute Management

For more information about all of the items related to Data Center, visit the Knowledge Base and look for the Data Center.

01. In Convercent you could manage your Location and Department within the organization management screen. In integrity Line you will manage your Location and Department attributes within the **Data Center**.

    a. Once in the Data Center navigate to the **Attributes Tab**. Here you can view the locations and departments migrated from Convercent.

    b. To Edit Locations or Departments click on the arrow to the far right to view the "Details" screen. Here you can click on each individual attribute to view, edit, and deactivate as needed.

Note – Here you will see a business unit attribute as well. This was not previously available in Convercent but is a standard attribute in Integrity Line that can be surfaced on intake and utilized within Roles and Permissions.