

Glossary of Terms: Convercent to Integrity Line Migration Guide

To help you learn your new Integrity Line in relation to Convercent, we have provided a glossary of terms, and a summary of the configurations that we have made for you below. If you would like to update your configurations or learn more about any of the features listed below, please visit our [Learn More](#) Guide.

Convercent Terminology	Upgrade Notes	EQS Terminology
Convercent Platform	N/A	EQS Compliance Cockpit
Helpline & Case Management solution	N/A	Integrity Line solution
Single Sign-On (SSO)	Your IT team will need to configure SSO in Compliance Cockpit if needed.	Single Sign-On (SSO)
Call Center	The Convercent call center has been moved to EQS, it functions the same way. All phone numbers are staying the same.	Call Center
User Profiles	We migrated your users from Convercent to EQS with the appropriate roles.	Users are found in the Data Center . Roles and Permissions are also found in Data Center
Landing Page	We created your landing page based on your Convercent page and based on any feedback you may have provided in the Upgrade Survey.	Web Intake (to view your web intake find Text Editor)
Intake Channel	We created your Intake Channel based on your Convercent intake configurations. If you have multiple intake channels you will see these reflected in separate forms OR separate form bundles as needed.	Form Bundles and Forms
Terms and Conditions	We created the country disclaimers based on the terms and conditions present in Convercent.	Country Disclaimers
Locations	If you used Locations in Convercent, these locations migrated to the "Location" attribute. If locations were surfaced on your	Attributes are found in the Data Center , & within Form

	intake page, the applicable locations are also surfaced on your new EQS form.	questions (if applicable)
Departments	If you used Departments in Convercent, these Departments migrated to the "Department" attribute. If departments were surfaced on your intake page, the applicable departments are surfaced on your new EQS form.	Attributes are found in the Data Center , & within Form questions (if applicable)
Geography Rules	We created forms to reflect the countries and/or regions you had configured in geography rules in Convercent.	Replicated by applying Countries to Forms in Form Settings .
Notification Profiles	We replicated the Notification Profiles you had in Convercent with User Roles. You can view the custom roles within the Data Center.	User Role settings found in the Data Center & Folders (if needed)
Cases/Issues	Cases from Convercent have been migrated into Integrity Line. Please see the Case Data Validation document to learn how case data was migrated and confirm data was migrated appropriately.	Cases
Issue Types	We replicated the issue types in Convercent in the classification section.	Classifications
Custom Issue Status	If you used Custom Issue Status, in Convercent, these have been migrated as steps within a workflow.	Workflow
Resolution Type	We replicated the case resolution types present in Convercent in the Conclusion section.	Conclusions
Escalation Rules	If you used escalation rules in Convercent, these have been migrated in Case Screening.	Case Screening
Case Custom fields	If you used custom case management fields in Convercent these fields have been recreated for you within custom case tabs.	Case Tabs
Issue Required Fields	Fields created on custom case tabs can be marked as required. You can also utilize workflows to ensure the appropriate information is filled out prior to moving on to the next step. See the New Features Guide for more info	Case Tabs

Case Management Message Board Templates	If you had message board templates configured in Convercent, these have been migrated to the Message Templates.	Message Templates
Automated Response to Reporter	If used in Convercent, we replicated the automated response to the reporter in EQS.	General Settings - Autoreply when a Report is Submitted
Involved Parties	See Allegation Manual for more detail on involved parties.	Involved Parties Tab
Sanctions	We replicated the sanctions in Convercent in the Corrective Action section.	Corrective Actions
Intent	We replicated the sanctions in Convercent in the Corrective Action section.	Contributing Factors