APPROVALS FEATURES THAT ARE NEW TO CONVERCENT & ONETRUST CUSTOMERS

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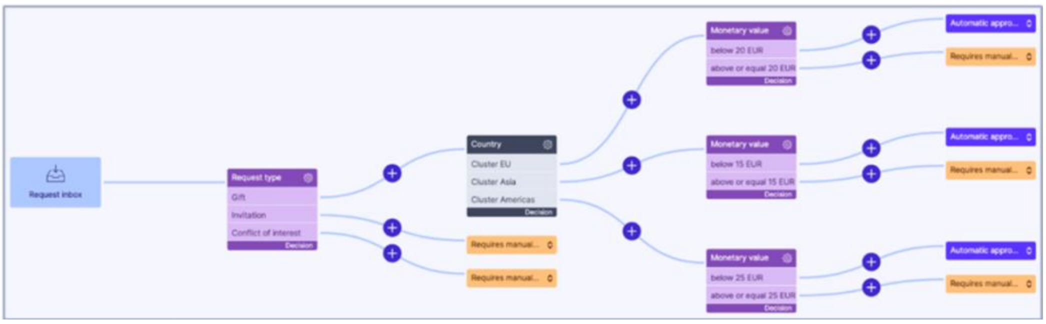
This guide covers the features that are available in Approvals that were not available on Convercent Disclosures, as well as the OneTrust Disclosures module.

For an in-depth overview of all of the Approvals features that you will need to manage your disclosures program in the EQS Approvals module, see the **Getting Started Guides: Go-Live and Learn More**.

New features for Convercent Disclosures Customers

01. Rule Engine – Read more about this feature here

- The rule engine allows you to use a visual flowchart to configure (semi) automated approval flows and define users and/or groups who will receive notifications for any submitted approval.
- The visual creator shows you a step-by-step flowchart to create rules based on key attributes to create multi-step approvals, if required. The visual representation allows you to easily see the sequence of activities and their connections.



- In Convercent, notification profiles are configured to notify users and/or groups when a new disclosure is submitted. All disclosures need to manually be approved or rejected, as there is no auto-approval rule configuration. There is also no ability to create a multi-step approval rule.

02. Anonymization (No HelpDesk article on it yet)

- Manually anonymize and permanently remove personal data (PII) in submitted requests. This includes names, attachments, and other free text content. The anonymization feature helps organizations stay compliant with privacy laws like GDPR and improve control over sensitive data, while keeping a full, audit-ready history.
- In Convercent, there was a similar feature called reaction, but it was hard to find.

03. [Coming Soon, 2025 Enhancement] Form Builder (No HelpDesk article on it yet)

- The form builder allows you to configure and update disclosure questionnaire forms without engaging with the EQS team for support. The easy to use, drag and drop builder is flexible and enables you to design forms that are clear and concise for your organization's needs and self-serve at your own convenience. These forms can include conditional logic.
- In Convercent, disclosure forms required support from the Professional Services team to be updated.

04. [Coming Soon, 2025 Enhancement] Translations (No HelpDesk article on it yet)

- Translations for forms and questionnaires can be managed and updated within the form builder, eliminating the need to engage the EQS team for support. Translations can be managed by your team with a user-friendly interface.
- In Convercent, translations were loaded via a CSV UTF-8 encoded file and required support from the Professional Services team to make any updates.

New features for OneTrust Disclosures Customers

01. Rule Engine – Read more about this feature here

- The rules engine allows you to use a visual flowchart to configure (semi) automated approval flows and define users and/or groups who will receive notifications for any submitted approval.
- The visual creator shows you a step-by-step flowchart to create rules based off key attributes to create multi-step approvals, if required. The visual representation allows you to easily see the sequence of activities and their connections.
- In OneTrust, workflows are viewed as flat lists, configured on a form wizard. The stages/rules are separated throughout pages of the wizard, making it difficult to visualize the step-by-step flow.

02. Anonymization (No HelpDesk article on it yet)

- Manually anonymize and permanently remove personal data (PII) in submitted requests. This includes names, attachments, and other free text content. The anonymization feature helps organizations stay compliant with privacy laws like GDPR and improve control over sensitive data, but keep a full, audit ready history.
- In OneTrust, anonymization or any type of redaction feature was not available in disclosures.

03. [Coming Soon, 2025 Enhancement] Employee Scorecard (No HelpDesk article on it yet)

- Disclosure Managers will be able to view all of the Compliance Cockpit activities for a specific employee in one place, depending on their access permissions within the platform. These could include previous Approval Requests, Integrity Line cases that they have been involved with, and their history of certification for company Policies.
- In OneTrust, there was no central way to view this employee activity.