NEW FEATURES FOR CONVERCENT CUSTOMERS

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INTEGRITY LINE FEATURES THAT ARE NEW TO CONVERCENT CUSTOMERS

This guide covers the features that are available in Integrity Line that were not available on the Convercent platform. Some of the features noted are limited to those with an Enterprise license of Integrity Line, so if you do not see the features in your system or would like to purchase them, reach out to your Customer Success Manager or Account Executive.

For a more in-depth overview of all Integrity Line features, see the **Getting Started Guides: Go-Live and Learn More**

01. Require 2 users to delete and close a case – Read more about this feature here.

- This optional configuration is a toggle to require/not require 2 users to delete and/or close a case. Every user with permission to access the case will automatically receive an email about the pending deletion/closing request, and another case manager must confirm the request to process the permanent deletion.

02. Case Management Translations in the Backend

- Classifications (Issue Types), Conclusions, Folders, Workflows, and Case Tabs can all have translations in Compliance Cockpit for case managers. Any of the system default values will be translated to 8 other languages, and any custom values can be manually updated with translations.
- In Convercent, it was only possible to translate the reporter experience, but case management fields were only available in English. Now your case managers can choose from up to 8 languages to use their native language, depending on your company policy and the number of languages you have licensed in Compliance Cockpit.

03. Reminders for Case managers - Read more about this feature here.

- Auto reminder for case managers can be set up for after a case has been created after X number of days, and when a case has been closed

04. Customizable case export functionality – Read more about this feature here.

- When completing a case export in Integrity Line, the case manager has the ability to exclude or include certain fields to curate the extract to their needs. The admin can also save their export template for recurring use.
- In Convercent, it was only possible to extract a case export containing standard fields.

05. Case Closure email notifications – Read more about this feature here.

- Upon closing a case, the case manager has the option to send a case closure notification via email to the reporting party and/or the case managers that have access to the case. These emails can also be set up as message templates in the system configuration.

- In Convercent, it was not possible to notify the reporting party about case closure in the process of closing a case. The message had to be manually sent to the reporter BEFORE closing the case in the system.

06. Document Hosting for web intake - Read more about this feature here.

- Documents in Compliance Cockpit serves as a document manager for case managers to store policies and other company-related materials. These can be seamlessly linked on the Integrity Line web intake page for reporting parties to access.

Note - This is separate from the Policies module in the Compliance Cockpit.

07. Password Protection for web intake - Read more about this feature here.

- Web intake can be optionally secured with a password, so reporters are prompted to enter a password to access the page to submit a report
- This can be useful if the web intake page is under maintenance or should only be utilized by a specific employee group

08. Mobile Optimized Web Intake

- The web intake system has been specifically optimized for mobile devices, providing a seamless experience for reporters who prefer accessing the platform via their smartphones or tablets. Users can easily submit reports or check the status of their submissions from any device without encountering any issues.
- Previously, the landing page and intake forms utilized in Convercent for reporting parties were not designed with mobile optimization in mind. This made it difficult for those wishing to submit a report to do so easily on a mobile device.

Integrity Line offers various add-ons that can be purchased separately to extend the functionalities of Integrity Line even further. Noted below are the add-on features for those with an Enterprise tier of Integrity Line:

01. AI Features – Read more about this feature here.

- AI classification: A feature that automatically classifies alerts based on the information provided by the whistleblower during the submission process.
- AI short description: A brief description is generated for each case, enabling you to quickly prioritize actions.
- AI transcription: Case Managers can also initiate an automatic AI transcription for voice file attachments of *Web Intake* cases, messages in the Secure Inbox and cases reported via Phone Intake.
- AI anonymization: During the anonymization process, Case Managers have the ability to manually remove or overwrite personal or confidential data within the reporting form, case notes, Secure Inbox, and custom tabs.

02. Email intake – Read more about this feature here.

- Allows reporters to submit cases via email. EQS will provide a dedicated email address that is separate from your company's IT infrastructure.

03. Customizable Workflows - Read more about this feature here.

- Provides a more nuanced status for a case in progress to reflect the status of the investigation
- Workflow stages can be associated to custom case tabs with mandatory fields to ensure all necessary information is included in the documentation
- In Convercent, the customization of case status was limited, and it did not have the ability to tie mandatory fields to workflow stages. This feature will allow case investigators to stay organized and apply any internal investigation processes directly into the tool.

04. Multiple Web Intakes – Read more about this feature here.

- The Integrity Line can be effectively utilized by organizations with multiple subsidiaries, allowing each subsidiary to maintain its own dedicated web intake page for reporting purposes. This setup enables each web intake page to feature customized branding, tailored forms, specific resources, language options, and unique URLs, all while consolidating report management within a single Compliance Cockpit.
- In contrast, the Convercent platform did not accommodate the creation of multiple landing pages for a single organization. Subsidiaries that required distinct landing pages with new branding or alternative URLs faced limitations under that system.

If you wish to purchase any of the above add-ons, please contact your Customer Success Manager and/or Account Executive.