EQS Policies

POLICIES FEATURES THAT ARE NEW TO CONVERCENT & ONETRUST CUSTOMERS

This guide covers the features that are available in Policies that were not available in Convercent and OneTrust Policies.

POLICIES FEATURES THAT ARE NEW TO CONVERCENT & ONETRUST CUSTOMERS

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

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

New features for Convercent Policies Customers

01.   Add Policy Content via Text Editor – Read more about this feature here.

■ Policy content can be added in three different ways on the Compliance Cockpit: via file upload, link, or text editor. The text editor allows you to format the content as needed in a rich text editor.

■ In Convercent, the only options for adding policy content are via file upload or link.

02.   Policy Translations – Read more about this feature here.

■ Policies with translations can be uploaded for each active Integrity Hub language. The policy for the default language will be uploaded first, then each translation of the text can be added. For users reading the policy, they will see the policy in their preferred language based on their Integrity Hub settings.

■ In Convercent, policies that are multi-lingual are either a policy set, which cannot be sent out via campaigns, or set up as multi-layer PDFs using a tool outside of the Convercent system prior to being uploaded. Users still must navigate a document outside of their native language to find the appropriate translated version within the document.

03.   Approval Workflow and Templates (No Support Center article on this yet)

■ Multi-step approval workflows allow you to create approval rounds and designate users to approve policy drafts before publication. These workflows can be saved as templates to streamline the process of managing policies, allowing you to create a reusable library of workflows that can be selected across multiple policies.

■ The policy approval rounds can include an optional form to add targeted questions that guide the approver as they evaluate the policy draft.

■ In Convercent, there is no approval workflow with approval rounds or templates for reviewing drafts before publication.

04.   Certification Methods – Read more about this feature here.

■ When creating a policy, you have the option to select between various certification methods: Read only, sign button, quiz, or approval manager questionnaire (if using the approvals module). These

methods enable you to specify how employees should acknowledge the policy and whether they need to complete a more comprehensive confirmation.

- The quiz option is configurable and allows admins to add multiple-choice questions, and can include translations.
- In Convercent, certification methods to policies are limited.

05. Public Policy Links - Read more about this feature here.

- Policies that do not require an active certification, and are designated as read-only, can be made available to anyone with a link. This can be useful for posting a policy on a public website, or for making policies available for reference for employees that do not have an email address with the company.
- In Convercent, there is no way to share policies via a public link. Only those with a registered account to the employee portal can view any policies.

06. Policy Sorting, Columns and Filters - Read more about this feature here.

- For admins, policies are displayed in a table format that includes sorting, column management, and filtering capabilities. This attribute-based sorting and filtering feature allows you to tailor your view of all policies according to what you and your team consider most important.
- In Convercent, there is no way to filter or update the view of all policies, which makes it difficult to navigate.

07. Policy Publication and Audience – Read more about this feature here.

- When creating a policy, there is a step to define the desired audience for the policy. This can be done by selecting all users in Data Center or using Intelligent Target Selection to define criteria based on attributes such as Job Title, Department, or Business Unit.
- Once the policy is created and published, the policy is distributed to the defined audience where they are notified via email.
- Additionally, it is possible to turn off notifications when publishing the policy, so that in case of a minor update, the relevant employees will have the latest available version in Integrity Hub when they need to reference it.
- In Convercent, policies are only distributed via campaigns.

New features for OneTrust Policies Customers

01. Approval Workflow Rounds Form Questions (No Support Center article on this yet)

- Approval workflows allow you to create approval rounds and designate users to approve policy drafts before publication. These workflows can be saved as templates to streamline the process of managing policies, allowing you to create a reusable library of workflows that can be selected across multiple policies.
- The approval rounds can include an optional form to add targeted questions that guide the approver as they evaluate the policy draft.
- In OneTrust, there is no ability to add form questions within approval rounds for reviewers to complete during reviews.

02. Upload Additional Materials with Policy - Read more about this feature here.

- When creating a new policy, you can add supplemental materials that are visible to employee respondents, which can provide more clarification or support for the policy itself. The additional materials can be links to external content, or additional files such as PDF, JPG or PNG.

- In OneTrust, you do not have the ability to add supplemental materials alongside a policy for review by employees.

03. Certification Method: Quiz – Read more about this feature here.

- When creating a policy, you have the option to select between various certification methods: Read only, sign button, quiz, or approval manager questionnaire (if using the approvals module). These methods enable you to specify how employees should acknowledge the policy and whether they need to complete a more comprehensive confirmation.

- The quiz option is configurable and allows admins to add multiple-choice questions and can include translations.

- In OneTrust, certification methods to policies are limited and there is no quiz option for users to certify.

The Policies module offers an AI add-on that can be purchased separately to extend the functionalities even further. Noted below are the add-on features for those with an Enterprise tier of Policies:

01. Policy Buddy – Read more about this feature here.

- Policy Buddy is an AI assistant that can answer user questions around information included in your company policies and provides answers based on which policies the employee has access to. Policy Buddy can answer questions in various languages and does not save any personal information (PII) but is recorded for quality review and continuous improvement of the feature.

- In Convercent or in OneTrust, there is no AI integration available that can provide answers from the contents of your company's policies based on a question prompted by users.

❯ *Note - If you wish to purchase the above add-on, please contact your Customer Success Manager and/or Account Executive.*