EQS

GUIDE TO CONVERCENT EXTRACT

This guide outlines the format of the Convercent data extract

The guide below outlines the format of the Convercent data extract. It is not a full data dictionary, but rather a quick reference to help you navigate key information efficiently.

Each Convercent extract will be provided via our SFTP as a .zip file. This file can be encrypted upon request.

❯ **Note - If you utilized the following in Convercent they are not a part of the standard extract and will be provided to you as separate files outside the zip file:**

Case Custom Fields: Provided in a casecustomfields.csv

■ Involved Party Custom fields: Provided in an involvedpartycustomfields.csv

■ Custom case statuses

■ Evidence attachments under the "Evidence" tab of an investigation

■ These will be provided as a separate file folder.

■ Each evidence attachment will be provided in a folder labeled with the applicable Evidence ID and each evidence attachment will be names with it's AttachmentID.

■ See the evidenceIDMapping spreadsheet to document the original attachment name in the system and tie it back to the appropriate investigation.

Once the file is unzipped in a secure location you will see the following sub folders:

Name	Type
📁 Disclosure	File folder
📁 DscAtch	File folder
📁 InvAtch	File folder
📁 Investigation	File folder
📁 IssAtch	File folder
📁 Issue	File folder
📁 QnAtch	File folder
📁 Questions	File folder

❯ **Note - if you do not see one of the outlined folders in your extract then you either did not have a license to the module, you did not utilize that section of the application, or that portion of the extract was not included in the scope of work.**

Each folder contains the following:

Disclosure

- Disclosures.csv
  - Detailed overview of all disclosures.
- DisclosureMessages.csv
  - Messages associated with a disclosure. Can be linked to the disclosure.csv using the CounterpartDisclosureId column.
- DisclosureQuestionnaire.csv
  - Overview of details on questionnaires and responses.
- DisclosureQuestions.csv
  - View of all questions that are associated to a disclosure. Can be linked to the disclosure.csv using the CounterpartDisclosureId column.
- DisclosureTasks.csv
  - View of all tasks that are associated to a disclosure. Can be linked to the disclosure.csv using the CounterpartDisclosureId column.

DisAtch

- Contains all attachments related to each disclosure. The attachments for each disclosure will be retained in a subfolder titled with the disclosures internal tracking number.

InvAttachments

- All attachments loaded under the Attachment tab in an Investigation can be found here.

Investigation

- InvestigationActivities.csv
  - Overview of the information found in the activities tab of an investigation. Can be linked to the Investigations.csv using "ID" column.
- InvestigationAttachmentDetails.csv
  - Provides the attachment name and date created for each investigation attachment. Can be linked to the Investigations.csv using "ID" column.
- InvestigationEvidences.csv
  - Overview of all information under the Evidence tab of an investigation. Can be linked to the Investigations.csv using "ID" column.
- InvestigationFindings.csv
  - Overview of all information under the Findings tab of an investigation. Can be linked to the Investigations.csv using "ID" column.
- Investigations.csv
  - Overview of investigation details and which Issue it has been linked to (if applicable)
- InvestigationTasks.csv
  - Overview of all information under the Tasks tab of an investigation. Can be linked to the Investigations.csv using "ID" column.
- InvestigationThreads.csv

- Overview of all information under the Messages tab of an investigation. Can be linked to the Investigations.csv using "ID" column.

IssueAtch

- Contains all attachments related to each Issue. The attachments for each Issue will be retained in a subfolder titled with the Issues internal tracking number.

❯ *Please note that if attachments in CVT were loaded with identical file names the files are appended with (1), (2), etc. as needed to ensure all files are retained.*

Issue

- IssueAccess-Groups.csv
  - Overview of groups that have been granted or denied access to certain cases. Can be tied back to the issue.csv using the internalTrackingNumber.
- IssueAccess-Users.csv
  - Overview of users that have been granted or denied access to certain cases. Can be tied back to the issue.csv using the internalTrackingNumber.
- IssueAllegations.csv
  - Overview of each allegation associated to an Issue including associated involved party, role, sanction, and substantiation. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueAttachmentDetails.csv
  - Provides the attachment name and date created for each Issue attachment. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueContributingFactors.csv
  - Overview of contributing factors linked to each case. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueIntakeCustomFields.csv
  - Overview of custom fields answered by the reporter upon intake. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueInvolvedParties.csv
  - Listed all involved parties associated to an incident (even those that are not tied to an allegation). Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueProxyReporterDetails.csv
  - Provides information on who entered a case that was proxied into the system. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueRelatedIssues.csv
  - Details cases that have been linked via the related cases functionality.
- IssueReportedDepartment.csv
  - While the issue.csv details the current Department, this csv details the department that was initially reported upon intake when applicable. Can be linked to the Issues.csv using InternalTrackingNumber.

- IssueReportedLocations.csv
  - While the issue.csv details the current Location, this csv details the location that was initially reported upon intake when applicable. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueReportingParties.csv
  - Provides the reporting parties information when the case was not anonymous. Can be linked to the Issues.csv using InternalTrackingNumber.
- Issues.csv
  - Provides an overview of each issue.
- IssueSurveyResponses.csv
  - Provides an overview of responses to Standard intake questions linked to issue types. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueTags.csv
  - Details tags associated to each issue. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueTasks.csv
  - Details tasks associated to each issue. Can be linked to the Issues.csv using InternalTrackingNumber.
- IssueThreads.csv
  - Details internal and external messages associated to each issue. Can be linked to the Issues.csv using InternalTrackingNumber.

QnAtch

- Contains all attachments related to each Question. The attachments for each Question will be retained in a subfolder titled with the Questions internal tracking number.

Questions

- QuestionAttachmentDetails.csv
  - Provides the attachment name and date created for each Question attachment. Can be linked to the Questions.csv using InternalTrackingNumber.
- Questions.csv
  - Provides an overview of each question.
- QuestionThreads.csv
  - Details internal and external messages associated to each question. Can be linked to the Questions.csv using InternalTrackingNumber.

❯ *Note - Some of the data for issues and questions were stored in the same tables in the data base. If you are not finding information related to a question in the question folder, please look for the applicable information within the CSVs in the Issues folder. For example, the reporter information for a non-anonymous question can be found in the IssueReportingParties.csv*

Extra tip:

Opening the CSV files

This is a CSV file and line breaks won't load properly unless you open it as a CSV. To do this:
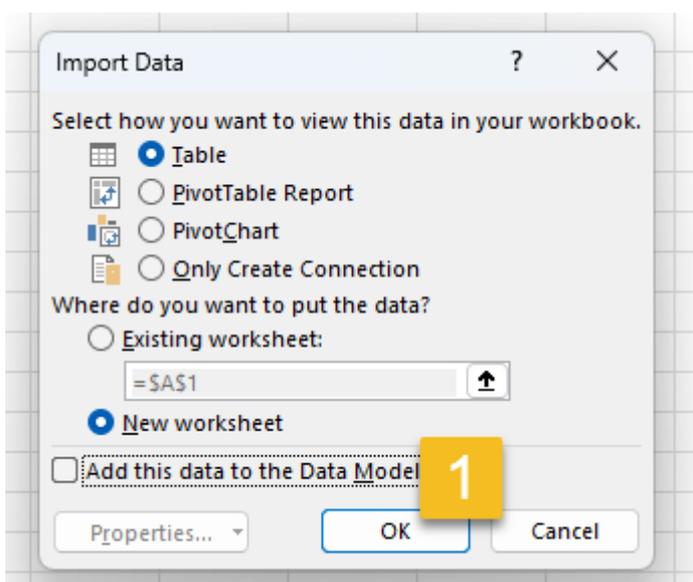
01. Open a blank excel file

02. Navigate to the data tab (1)

03. Click on the Dropdown 'Get Data' (2)

04. Select 'From File' (3)

05. Click on 'From Text/CSV' (4)
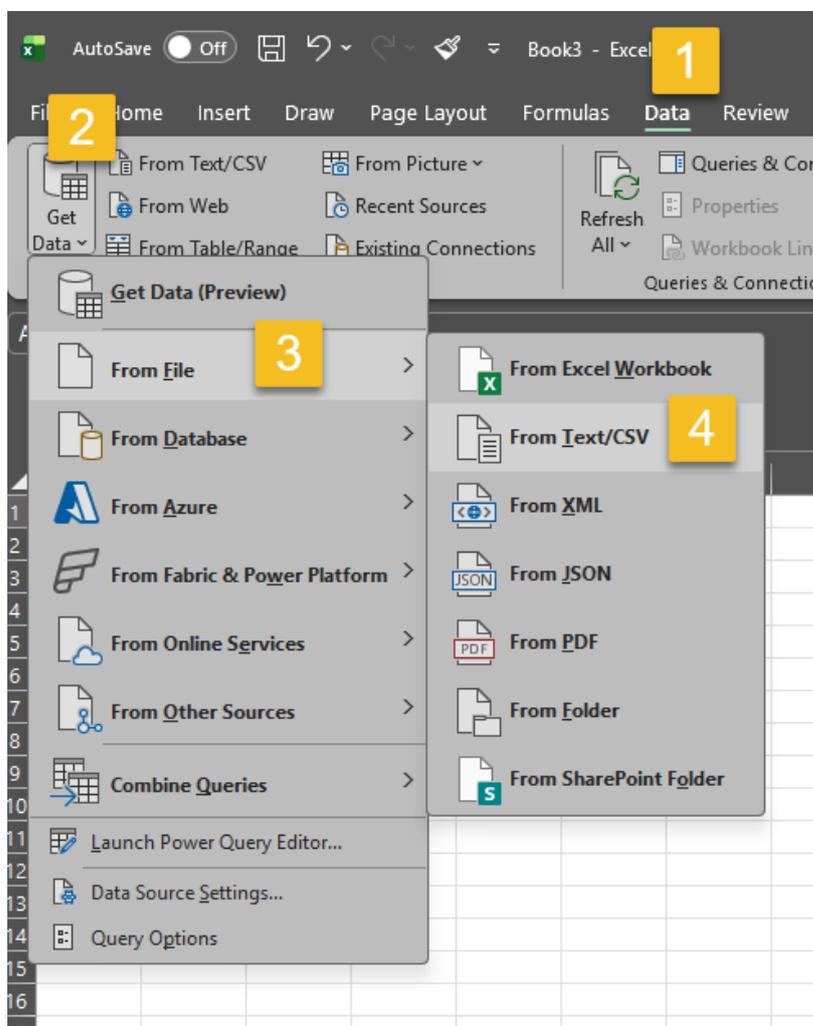
06. You will then want to import the 'Issues' .csv file

07. Once the following screen loads you will need to click the arrow button next to 'Load' (1)

08. And click on the 'Load To...' value (2)
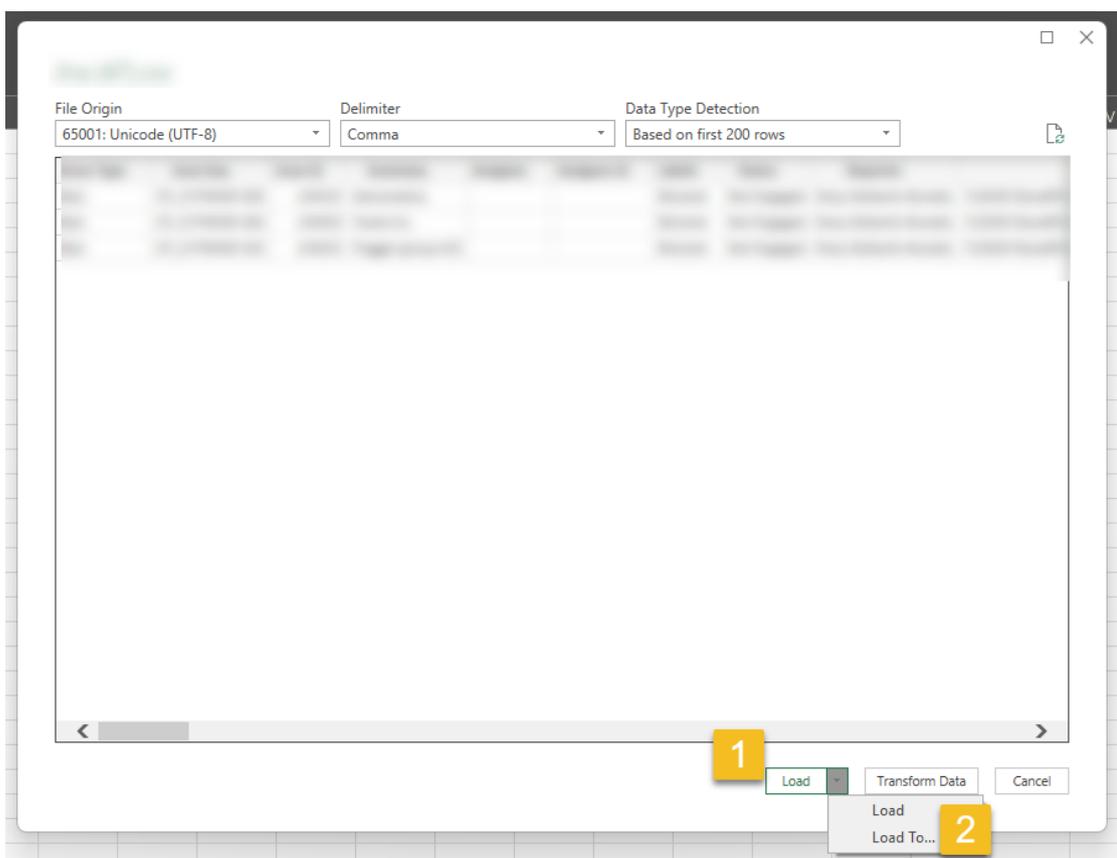
09. You can simply select 'OK' on the following screen (1)

10. Your data will load and be far easier to read at this point. Once this is done, We highly suggest saving the file as an .XLSX so you don't have this issue again.