



# **APPROVALS – GETTING STARTED GUIDE**

[Learn More](#)

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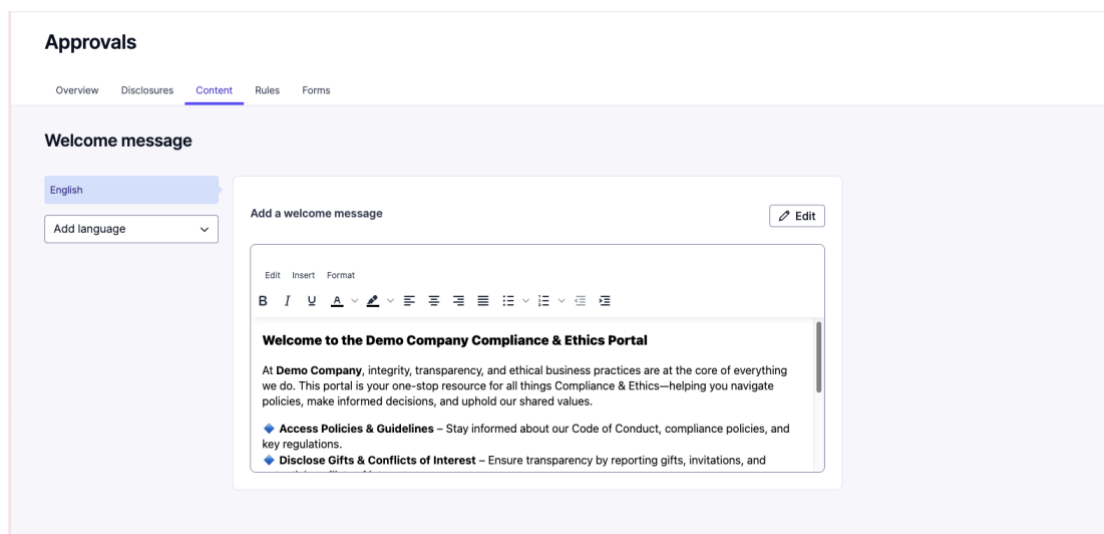
# 1. Learn More

This guide is a companion to the [Approvals Go Live Guide](#). Once you are confident that your account is live, please read through these additional resources. The information below is shared to help you learn more about Compliance Cockpit and to guide you through any configuration updates that you may want to make to your Compliance Cockpit account. After reviewing this configuration guide, learn more about Managing Requests using resources from the [Knowledge Base](#) and from the [Upgrade Page](#).

## 1.1. Configuration

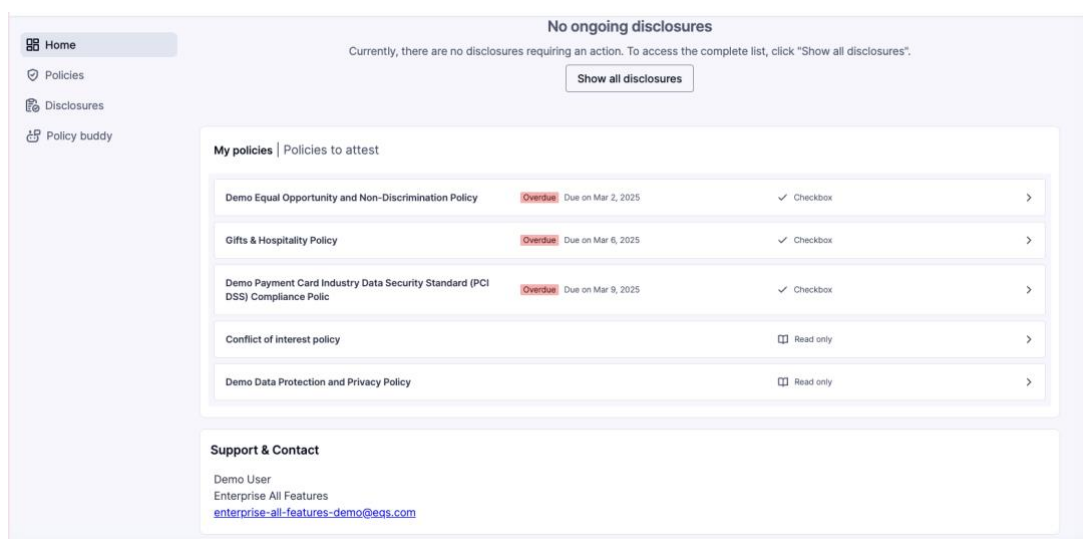
### 1.1.1. Content

In the Approvals module, the **Content** tab gives you the opportunity to post a rich text message on the home page of EQS Integrity Hub. This message can contain links to external documents and websites.



Using the language selector, you can post messages in several languages.

Please contact support if you wish to update the **Support and Contact Details** that are found at the bottom of the Integrity Hub portal.



### 1.1.2. Rule Engine

Rules in the Approvals Rule Engine have been configured to mirror Convercent Notification Profiles as closely as possible.

They can be amended to meet the needs of your organization over time. Before doing this there a few important points to consider:

01. There is only one rule set. **If the rule set gets deleted, it is permanently gone and cannot be retrieved.** Please ensure you have a detailed record of your requirements and a screenshot you the current rule set before making changes.
02. If you are confident and happy with your changes, please remember to save before leaving the rule engine otherwise you will lose your changes.

For more information about the Rule Engine, visit the [Knowledge Base](#).

### 1.1.3. Approval Form Builder

The form builder is available in EQS Compliance Cockpit for customers to make changes and create new forms without relying on EQS Support.

01. Admins can create and edit Approval forms to define the information employees must provide when submitting requests (e.g., gifts, hospitality, or conflicts of interest).
02. Forms can be customized with different types of fields, conditional logic, and other configurations.

← Back to forms Save and Publish

**Conflict of interest**  
Published Last edited on: Aug 4, 2025

Form builder Details Translations

**Basic form elements**  
Drag the form elements into the workspace to configure them.

- Text input
- Text area
- Singleselect
- Dropdown
- Number input
- Title

**Advanced form elements**

- Date

**Conflict of interest** + Add Page

Conflict of interest

Text input

\* Give your conflict of interest a short name. ⓘ

Dropdown

\* What type of conflict of interest would you like to declare? ⓘ

Please select ...

Text area

For more information about the form builder, visit the [Knowledge Base](#).

### 1.1.4. Campaigns

EQS Campaigns is a powerful engine that enables the distribution of policies and disclosure questionnaires to targeted audiences for maximum engagement.

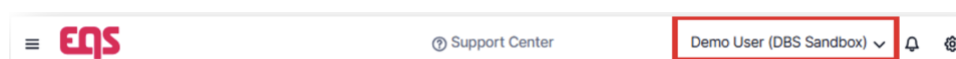
01. You can add multiple action items into one campaign, determine the order of appearance of the items, and can enforce a sequence for completion so that employees will have to complete the items in the order you set.
02. Admins can easily track the progress of campaigns in real time. Track completion status, identify non-responders, monitor campaign performance, and follow audit trails.

For more information about Campaigns, visit the [Knowledge Base](#).

## 2. Product Enhancements

EQS Product team regularly releases new functionality and enhancements to existing features.

Please be sure to subscribe to the EQS Compliance Cockpit product updates to stay up to date.



### Notifications

**Compliance Cockpit** ^  
Subscribe to Product Updates   
Subscribe to Marketing Updates

**Integrity Line** v

**Approvals** ^  
Subscribe to Compliance COCKPIT Weekly Reminder

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 x

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dbs-sandbox-demo@eqs.com

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