



APPROVALS – GETTING STARTED GUIDE

[Learn More](#)

Table of Contents

| | |
|-------------------------------|---|
| 1. Learn More | 2 |
| 1.1. Configuration..... | 2 |
| 1.1.1. Content | 2 |
| 1.1.2. Rule Engine..... | 3 |
| 1.1.3. Form Builder | 3 |
| 1.1.4. Campaigns..... | 4 |
| 2. Product Enhancements | 4 |

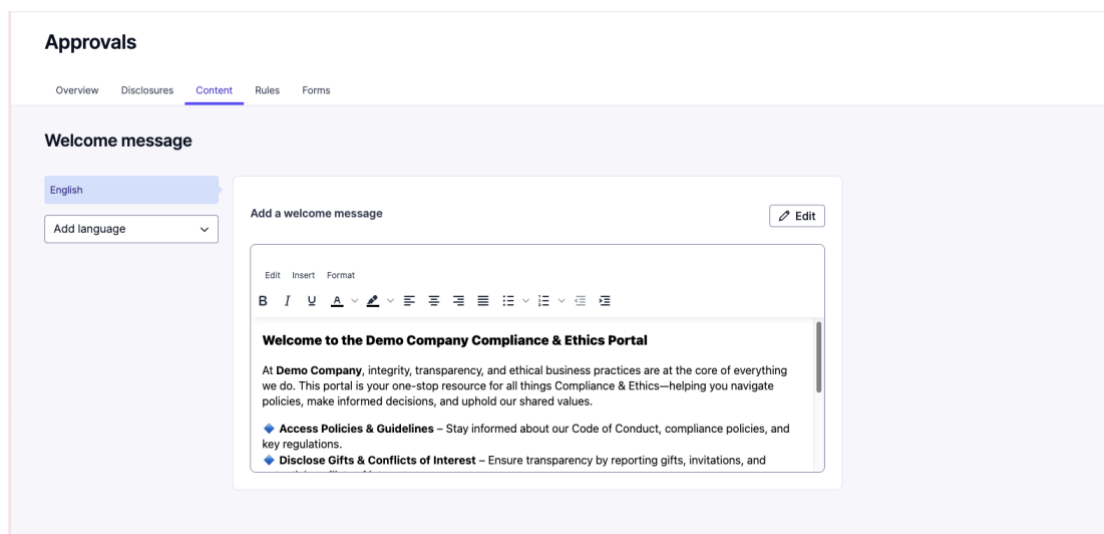
1. Learn More

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.

The screenshot displays the EQS Compliance Cockpit interface. At the top, it states "No ongoing disclosures" and provides a "Show all disclosures" button. Below this, a section titled "My policies | Policies to attest" lists several policies with their status and due dates:

| Policy Name | Status | Due Date | Action |
|--|---------|--------------------|-------------|
| Demo Equal Opportunity and Non-Discrimination Policy | Overdue | Due on Mar 2, 2025 | ✓ Checkbox |
| Gifts & Hospitality Policy | Overdue | Due on Mar 6, 2025 | ✓ Checkbox |
| Demo Payment Card Industry Data Security Standard (PCI DSS) Compliance Polic | Overdue | Due on Mar 9, 2025 | ✓ Checkbox |
| Conflict of interest policy | | | ☐ Read only |
| Demo Data Protection and Privacy Policy | | | ☐ Read only |

Below the policies list, there is a "Support & Contact" section with the following information:

- Demo User
- Enterprise All Features
- enterprise-all-features-demo@eqs.com

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. 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.

03. Admins can create and edit disclosure forms to define the information employees must provide when submitting disclosures (e.g., gifts, hospitality, or conflicts of interest).
04. 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.

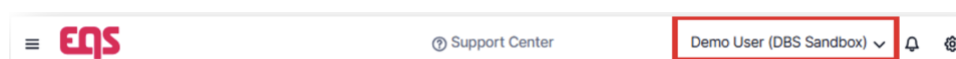
01. You can add multiple action items into one campaign, determine the order of appearance of the items, and can enforce a sequence for completion so that employees will have to complete the items in the order you set.
02. Admins can easily track the progress of campaigns in real time. Track completion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

Profile settings

 x

[Logout](#)

User
Demo User

Email address
dbs-sandbox-demo@eqs.com

Language
English v

[Change your password](#)

[My profile](#)

[Notification settings](#)

[Recovery Key](#)

[Open Integrity Hub in a new tab](#)