Glossary of Terms: Convercent to Integrity Line Migration Guide

To help you learn your new Integrity Line in relation to Convercent, we have provided a glossary of terms, and a summary of the configurations that we have made for you below. If you would like to update your configurations or learn more about any of the features listed below, please visit our **Learn More** Guide.

Convercent Terminology	Upgrade Notes	EQS Terminology
Convercent Platform	N/A	**EQS Compliance Cockpit**
Helpline & Case Management solution	N/A	**Integrity Line** solution
Single Sign-On (SSO)	Your IT team will need to configure SSO in Compliance Cockpit if needed.	**Single Sign-On (SSO)**
Call Center	The Convercent call center has been moved to EQS, it functions the same way. All phone numbers are staying the same.	**Call Center**
User Profiles	We migrated your users from Convercent to EQS with a role that provides equivalent access to their Convercent permissions.	**Users** are found in the **Data Center. Roles and Permissions** are also found in **Data Center**
Landing Page	We created your landing page based on your Convercent page and based on any feedback you may have provided in the Upgrade Survey.	**Web Intake** (to view your web intake find Text Editor)
Intake Channel	We created your Intake Channel based on your Convercent intake configurations. If you have multiple intake channels you will see these reflected in separate forms OR separate form bundles as needed.	**Form Bundles** and **Forms**
Terms and Conditions	We created the country disclaimers based on the terms and conditions present in Convercent.	Country Disclaimers
Locations	If you used Locations in Convercent, these locations migrated to the "Location" attribute. If locations were surfaced on your	**Attributes** are found in the **Data Center,** & within **Form**

	intake page, all active locations are also surfaced on your new EQS form.	**questions** (if applicable)
Departments	If you used Departments in Convercent, these Departments migrated to the "Department" attribute. If departments were surfaced on your intake page, all active departments are surfaced on your new EQS form.	**Attributes** are found in the **Data Center,** & within **Form questions** (if applicable)
Geography Rules	We created forms to reflect the countries and/or regions you had configured in geography rules in Convercent.	Replicated by applying **Countries** to **Forms** in **Form Settings**.
Notification Profiles	We replicated the Notification Profiles you had in Convercent with User Roles. You can view the custom roles within the Data Center and the view the role assigned to each user under their user profile..	**User Role** settings found in the **Data Center** & **Folders** (if needed)
Cases/Issues	Cases from Convercent have been migrated into Integrity Line. Please see the **Case Data Validation document** to learn how case data was migrated and confirm data was migrated appropriately.	Cases
Issue Types (Primary and Secondary)	For migrated cases: The primary Issue Type from Convercent has been migrated to the Classification field in EQS. All issue types, including secondary issue types/multiple allegations, that were added to a Convercent case migrated as Allegations in the Involved Parties tab. For the intake form: Any active/selected issue types from Convercent will be reflected in the intake form. For configuration: We replicated the issue types in Convercent in the list of classifications and the list of allegations, including standard and custom issue types. Going forward, you will be able to apply one or more allegations to a case, and you can identify the primary allegation by designating the case classification.	**Classifications** and **Allegations / Allegation Types**
Custom Issue Status	If you used Custom Issue Statuses in Convercent, these have been migrated as steps within a workflow.	Workflow

Resolution Type	We replicated the case resolution types present in Convercent in the Substantiation section.	Substantiation
Escalation Rules	If you used escalation rules in Convercent, these have been migrated in Case Screening.	Case Screening
Case Custom fields	If you used custom case management fields in Convercent these fields have been recreated for you within custom case tabs.	Case Tabs
Issue Required Fields	Fields created on custom case tabs can be marked as required. You can also utilize workflows to ensure the appropriate information is filled out prior to moving on to the next step. See the **New Features Guide** for more info	Case Tabs
Case Management Message Board Templates	If you had message board templates configured in Convercent, these have been migrated to the Message Templates.	Message Templates
Automated Response to Reporter	If used in Convercent, we replicated the automated response to the reporter in EQS.	**General** Settings - **Autoreply when a Report is Submitted**
Involved Parties	See the **Allegation Management Guide** for more details about involved parties.	Involved Parties Tab
Sanctions	We replicated the sanctions in Convercent in the Corrective Actions section, and also put them in the Conclusions field. The values are in two places to support two different use cases for managing allegations.	Allegations - Corrective Actions and Conclusions
Contributing Factors/Intent	We replicated Behavioral Factors and External and Organizational Influences from Convercent in the Contributing Factors section.	Allegations – Contributing Factors
Redaction	If you used 'Redaction' in Convercent, there is equivalent functionality in EQS to anonymize case information.	Anonymize