

Getting started with Whispli

Configurator Guide

For Configurators and Admins

Whispli Configurator Guide

Welcome to Whispli!

Think about Whispli as an anonymous inbox to handle all your employees difficult conversations. We'll help you learn how to configure the platform step-by-step to encourage your employees to speak up and facilitate the investigation and collaboration on matters for your team.

We know you may still have questions, so please [reach out](#) to us if anything is not clear.

[Ready to start exploring Whispli?](#) This Configurator Guide will help you learn all you need to know to configure effectively the platform for your Employees and Case managers.

[Need more help?](#) Check out our [Helpcenter](#) with our FAQ and Best Practices.

Note. Sign in to view our full content

Content

Welcome to Whispli

[Whispli 2.0](#) | [Quick start](#) | [Glossary](#)

Account Preferences

[Update Organization Settings](#) | [Add Users](#) | [Set up Users Groups](#)

Whispli Basics

[Set up your Channel\(s\)](#) | [Customize your Page](#) | [Add languages](#)

Internal Processes

[Configure Workflows](#) | [Create Statuses](#) | [Set up Automations](#) | [Data Retention Policies](#)

Welcome to Whispli

Welcome to Whispli

[Whispli 2.0](#)

[Quick Start](#)

[Glossary](#)

[Account Preferences](#)

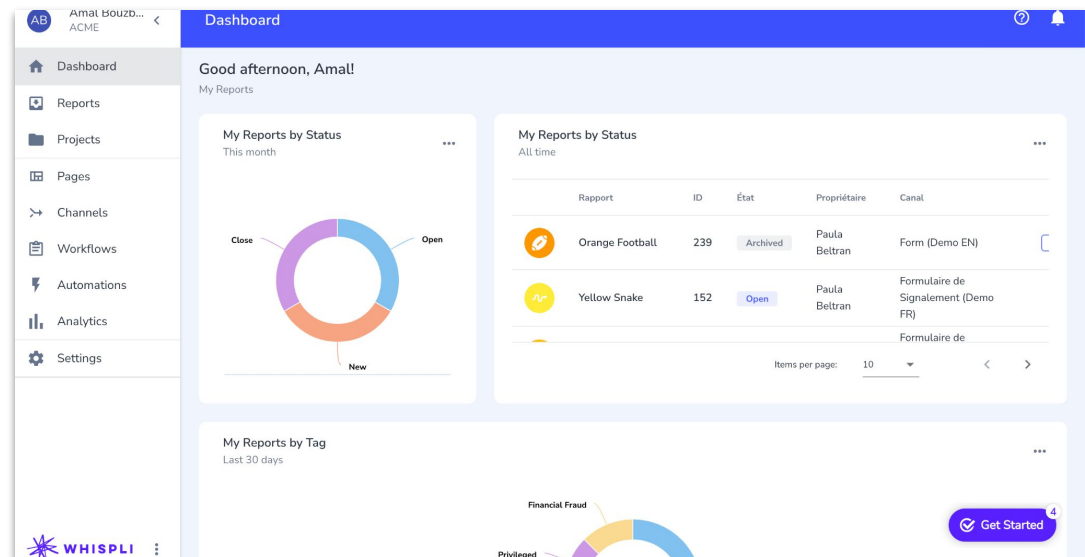
[Whispli Basics](#)

[Internal Processes](#)

Whispli 2.0

What's Whispli?

Whispli was founded by a whistleblower who wanted to make it easier for employees to speak up and report illegal or bad behaviour. Think about Whispli as an anonymous inbox to handle all your employees difficult conversations.



Welcome to Whispli

Welcome to Whispli

[Whispli 2.0](#)

[Quick Start](#)

[Glossary](#)

[Account Preferences](#)

[Whispli Basics](#)

[Internal Processes](#)

Whispli 2.0

What can I expect when I start configuring Whispli?

Whispli does not only enable secure, anonymous two-way communication with your employees, but it also support your team with its entirely configurable Case Management solution to ensure all Reports are being managed swiftly and effectively following your Organization internal processes, while complying with all regulations and legislations in the geography you operate into.

- Your employees will be granted access to one or several communication Channels to start engaging with your team.
- All of these conversations will take place from the Whispli anonymous inbox the employee will have created.
- You will be able to set up a Workflow to organise and prioritise investigations for Case Managers.
- Automations will save your team time by automating repetitive processes. For example, you can automatically assign new Reports to specific users, reply with a canned response to an informant and thousands of other possibilities that will surely fit your needs.

Welcome to Whispli

Welcome to Whispli

Whispli 2.0

[Quick Start](#)

[Glossary](#)

Account Preferences

Whispli Basics

Internal Processes

Quick Start

Follow the steps below to activate your Whispli Licence and access your account:

To access the Whispli account of your Organization, you are required to be added as a User by an already-registered Whispli user.

Complete your Whispli Registration

- You will receive an email from Whispli in your work email inbox to complete your registration.
- Click on the link in the email and create your complex password.
- You will now be able to access your Organization account by using your email as username and the password you set up.
- According to the role and permissions you are given, you will have access to some or all tabs of the account. As a simple Configurator you can only access the tabs related to Configuration; as an Admin, you have access to everything.

Welcome to Whispli

Welcome to Whispli

Whispli 2.0
Quick Start
[Glossary](#)

Account Preferences

Whispli Basics

Internal Processes

Glossary

Get familiar with the different words and expressions you will encounter while configuring the Whispli platform:

Report: in the platform, a Report refers to a report your Organization receives, sent by an employee or individual from your Organization. *(not available for Configurators)*

Project: a way to organise Reports together to aid with investigations or to help with your overall management of Reports. Examples of how you can organise Reports could be related to a specific incident, office location, type of misconduct, or related to an employee. *(not available for Configurators)*

Dashboard: when logging into your account, you will directly arrive on your Dashboard, which helps bring together all your information, including your current Reports. *(not available for Configurators)*

Page: a Page provides you with the ability to communicate your whistleblower program to your employees and stakeholders. Pages also allow you to integrate a channel so employees can submit anonymous reports to you.

Channel: a Channel is a way for an informant to submit information to your Organization through a specific medium (Online form, sms, email etc.)

Workflow: the questions you will answer as a Case Manager as you assess, investigate, and close out a case.



Account Preferences

Welcome to Whispli

Account Preferences

[Update Organization Settings](#)

Add Users

Set up Users Groups

Whispli Basics

Internal Processes


Update your Organization Settings

Learn how to set up Whispli specific for your Organization settings.

You can find your *Settings* in the left column on your screen. In Whispli's Settings tab, the options are split between the Settings specific to you as an individual (the *Me Settings*) and the Settings your Organization has. Every user has access to their own *Me Settings*, but only Administrators and Configurators have access to the *Organization Settings*.

Organization Overview

Manage your organization's settings

Organization name (Public) <input type="text" value="ACME"/> <small>This name will be seen by Informants on Pages</small>	Organization logo  Choose file <small>We support JPEGs or PNGs up to 1MB. This logo will be available to Configurators on Pages</small>
Default timezone for new Users <input type="text" value="(+01:00 CET) Europe Paris"/> <small>Users will be able to change their timezone individually</small>	

[Save](#)

Account Preferences

Welcome to Whispli

Account Preferences

[Update Organization Settings](#)

Add Users

Set up Users Groups

Whispli Basics

Internal Processes

Update your Organization Settings

Organization name (Public)

From the profile tab, you can edit your Organization Name. It will be displayed on your Page and on top of the Reporting Form for employees.

Change the Organization logo

In Settings, you can add your Organization's logo. Once you add your logo via Settings, it will become the default on each Page that you create.

While this logo will be the default logo, you can still change the logo on each individual page.

Set up the default timezone for new Users

Users will always be able to change their timezone individually but you can set up a different default timezone for Case Managers.

Account Preferences

Welcome to Whispli

Account Preferences

Update Organization Settings

[Add Users](#)

Set up Users Groups

Whispli Basics

Internal Processes

Add Users

From the User tab in your Settings, you can easily add additional Users to give them access as Case Managers to your Organization account.

- Click on "Add New"
- Choose their Role & Permissions within your Account
- Add a personal note to the invitation email they will receive to activate their profile.

Until Users activate their accounts, their name will be displayed in the Invitations tab.

Note. If all your seats are taken when adding a new User, you will need to [reach out to us](#) and we will help you to add a new User. You can check the number of seats (or User Licences) available in at the top of your Users tab.

The screenshot shows the 'Users' management page in Whispli. At the top, it says 'Users' and 'Invite team members to Whispli and manage their permissions.' Below this are three tabs: 'Active Users' (selected), 'Guest Users', and 'Invitations'. A progress bar indicates 'Using 11 of 20 paid seats'. Below the progress bar, there are buttons for 'Add new' and 'Hide inactive users', and a search icon. A table lists users with columns for Name, Role, Status, ZFA, and Last sign in. The first user listed is Paula Beltran, with Role Admin, Status Active, ZFA Disabled, and Last sign in 6 days ago. There is an edit icon to the right of the last sign in column.

Name	Role	Status	ZFA	Last sign in
Paula Beltran	Admin	Active	Disabled	6 days ago

Account Preferences

Welcome to Whispli

Account Preferences

Update Organization Settings

[Add Users](#)

Set up Users Groups

Whispli Basics

Internal Processes

Add Users

You can have different roles and permissions in Whispli. Learn more on the different user roles you can give to the Users you add to Whispli:

Member

By default, all Users are Members. With this role, Members will need to be invited to Reports or Projects to have access to them. However, if a Report does not have any owner yet, they are able to take ownership of that report by being the first person to open it.

Configurator

Configurators can configure Whispli but cannot access any Report or Project. With this role, they can access the Pages, Channels and Workflows tabs. They're also able to manage all Settings, except billing.

Admin

Admin users have all permissions: they can see all data, manage users, settings and billing. With this role, they have a full visibility on the Organization's account. They can also take ownership of any Report at any time, as well as lock specific Reports so other Members cannot access it.

Admin (restricted)

Admin restricted users have the same permissions as Admin, but can only access to Reports and Projects they are a member of or unassigned Reports.



Account Preferences

Welcome to Whispli

Account Preferences

[Update Organization Settings](#)

[Add Users](#)

[Set up Users Groups](#)

Whispli Basics

Internal Processes

Set up Users Groups

Learn how you can create User Groups and how you can use them:

User Groups are a way to group together specific Users or Case Managers into a team. It's quite useful in case you want to always add the same people to a Report. Instead of having to add them individually, you can create a User Group, add them to it, and then include this User Group on the appropriate Reports.

Some organisations create User Groups based on their location, type of misconduct, aligned by business unit, etc.

Click *Add a Group* and then create a descriptive name for your User Group that will help you identify it. Once the User Group is created, you can then add the appropriate team members to the group. If later, you need to add or delete team members, you can always do so.



Whispli Basics

Welcome to Whispli

Account Preferences

Whispli Basics

[Set up your Channel\(s\)](#)

Customize your Page

Add languages


Internal Processes

Set up your Channel(s)




Learn what channels are and how you can use them:

In Whispli, a channel is a way that an informant can submit information to you through a specific medium.

When you create a channel, the first step is to decide which medium you want the information submitted by. Currently only a web or mobile enabled form is available, but shortly live chat, anonymous email, and anonymous SMS will be rolled out.

 **Add a new Channel...** ✕

Channels lets your audience communicate with you. Once created, embed it on a Page and any new response will create a Report.

-  **Form**
Ask the questions and get answers in a structured way.
-  **Internal form**
Create a Draft Report on behalf of Informants and enable them to link it to their Safe Inbox.
-  **Chat**
Let Informants reach out to you using a simple chat. You can only have one Chat Channel per organization.

Whispli Basics

Welcome to Whispli

Account Preferences

Whispli Basics

[Set up your Channel\(s\)](#)

Customize your Page

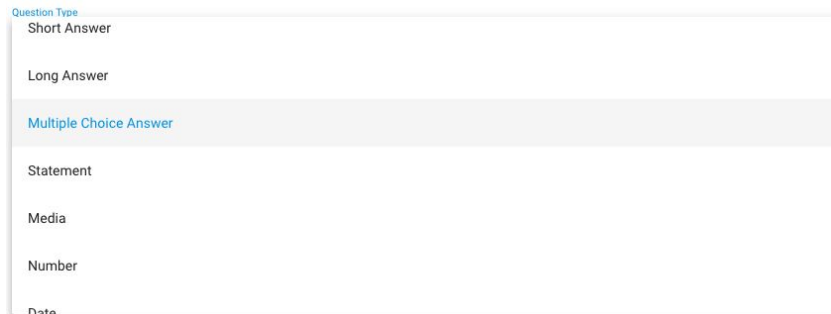
Add languages

Internal Processes

Set up your Channel(s)

Learn how you can build your Form from scratch by creating your questions and steps:

- Add a new question
- Choose the “Question type”



- In “Question Label” , write your Question title
- Choose if it should be a required question or not
- Provide a small description to give more information

Label

Please describe in details what happened

Add as many questions and steps to your Form as you need.

You can find more information on how to build your Form [here](#)



Whispli Basics

Welcome to Whispli

Account Preferences

Whispli Basics

Set up your Channel(s)

[Customize your Page](#)

Add languages

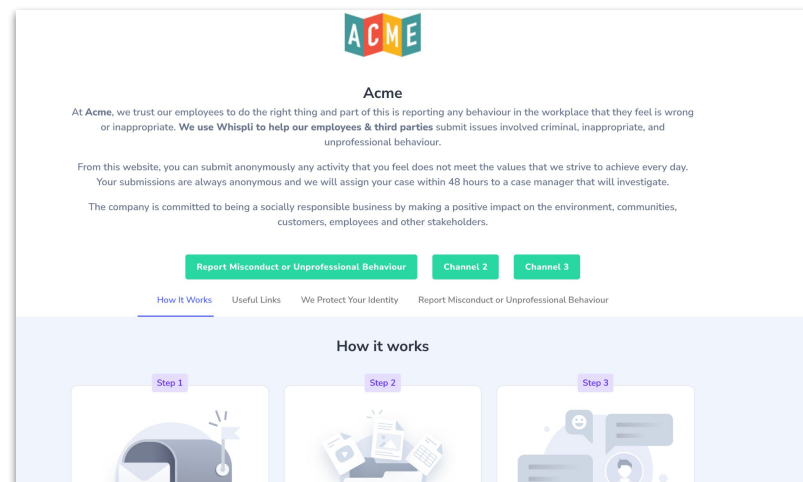
Internal Processes

Customize your Page

Learn more about how you can use Pages to communicate your whistleblower program and give employees a way to submit reports.

Pages provide you with the ability to communicate your whistleblower program to your employees and stakeholders. Pages also allow you to integrate a channel so employees can submit anonymous reports to you.

You can find more information on how to build your Page [here](#)



Whispli Basics

Welcome to Whispli

Account Preferences

Whispli Basics

Set up your Channel(s)
Customize your Page
[Add languages](#)

Internal Processes

Add languages

Learn more about how you can translate your Page and Channel in any language available:

Default Language

To help employees feel comfortable reporting wrongdoings, it's crucial they can make a whistleblowing report in their native language.

When you create a Page or a Form for the first time, you will be able to select your default language. Make sure you get the right default language, you won't be able to change it later!

Create page ×

Internal Name
My Organisation Page

Default language
English ▾

This cannot be changed later

CLOSE **CREATE**

Whispli Basics

Welcome to Whispli

Account Preferences

Whispli Basics

Set up your Channel(s)
Customize your Page
[Add languages](#)

Internal Processes

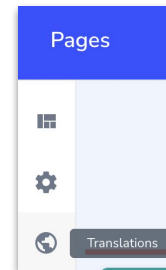
Add languages

Learn more about how you can translate your Page and Channel in any language available:

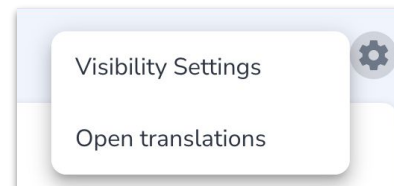
Add translations

Once you've created your Page or your Form, you will be able to add other languages. Careful ! You'll always need to add your Page translations as well as your Channel(s) translations separately:

- To add languages to your Page, click on the Translation Button in the top right corner of your Page:



- To add languages to a Form (Channel), click on the  icon in middle-top of your Form:



Internal Processes

Welcome to Whispli

Account Preferences

Whispli Basics

Internal Processes

[Configure Workflows](#)

Create Statuses

Set up Automations

Data Retention Policies

Configure Workflows

While Channels focus on the information that your organisation receives, Workflows are the questions your Case Managers will answer as they assess, investigate, and close out a case.

Creating a new Workflow

To create a new Workflow, click on *Workflows* in the left hand menu and then name your Workflow. After completing this step, you will be taken to the question builder page for Workflows.

Creating Questions The question builder for developing questions for your Workflow is exactly the same as for developing a questionnaire in *Channels*.

Creating Steps

In your Workflow, you can also create *Steps* of sections of the Workflow that help group questions in one area and also help show a progression to the case managers using the Workflow.

Read more on Workflows [here](#).

Internal Processes

Welcome to Whispli

Account Preferences

Whispli Basics

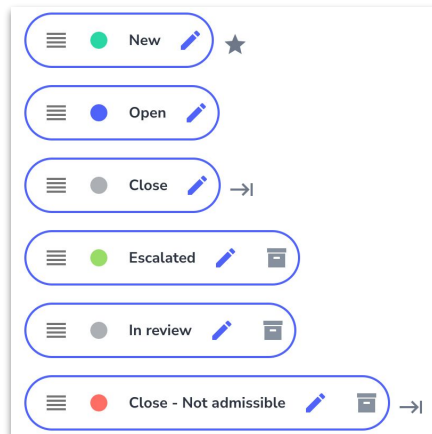
Internal Processes

Configure Workflows

Create Statuses

Set up Automations

Data Retention Policies



Create Statuses

Learn how you can create Statuses, change the names, archive and customise Whispli to fit your existing case management process:

In Whispli, you can customise the status that you have for both Reports and Projects. This allows you to create your processes in Whispli that match any existing process you might use for managing cases and investigations.

To customise your Statuses, first to go to *Settings* and click *Statuses*.

You will now see a list of the default Statuses in Whispli. From here, you can do the following:

- Edit the name of a Status
- Click on any of the pencil icons to the right of the Status to edit the name of the Status.
- At the bottom of each list of Statuses, you can choose which Status is the default for all new Reports or Projects. This is the Status that is automatically assigned once the Report is submitted by the informant.
- You can also choose which Status is the last Status in the project, which we call "End-Type Status". When you edit a Status, you have a checkbox option that will let you designate that Status as the last in your process.
- Archive the statuses no longer useful by clicking on the box icon.
- Change the colour of your statuses for more guidance.

You can also set up *Automations* that will change the Status based on how the informant responds to the questionnaire or actions a case manager takes in a Workflow.



Internal Processes

Welcome to Whispli

Account Preferences

Whispli Basics

Internal Processes

Configure Workflows

Create Statuses

[Set up Automations](#)

Data Retention Policies

Set up Automations

Learn what Automations are and how you can use them to power your use of Whispli:

Automations is one of the most powerful tools in Whispli.

By using Automations, you can decide what happens based on the responses from an informant or how a case manager responds during a workflow.

To set up Automations, go to *Settings, Automations*.



When A new Report is submitted...

IF

The Report's language is any of **English**

AND

The Channel is **Formulario (Demo ESP)**

THEN

Send a message to the Informant

Internal Processes

Welcome to Whispli

Account Preferences

Whispli Basics

Internal Processes

Configure Workflows

Create Statuses

[Set up Automations](#)

Data Retention Policies

Set up Automations

- **When:** Choose the events or activities that will trigger an automated process in Whispli
For example: Everytime you receive a new Report/Alert (*A New Report is submitted...*)

- **If All/Any Conditions are met:** You have the option to adds some conditions to automations - if all or any of them are met, then the automation will run.
For example: If a specific answer is provided by the informant in the reporting form (*If the answer sent by the informant to a Form question is...*)

- **Then:** Choose the action that will be automatically done when this events (and conditions if any) are met
For example: Delegate the report to a specific user (*Change ownership to...*)

Read more on Automations [here](#).

Internal Processes

Welcome to Whispli

Account Preferences

Whispli Basics

Internal Processes

Configure Workflows

Create Statuses

Set up Automations

[Data Retention Policies](#)

Data Retention Policies

The Data Retention Policy option under Settings allows your organisation to specify how long a Report will remain in Whispli after it has been archived:

Setting a Data Retention policy is optional and it only affects the Reports and Projects that have been archived.

If you wish to set up a Data Retention policy, click the menu item and then choose *Add A Policy*. Here you can choose how long you want your data to remain before it is permanently deleted from Whispli.

Data retention Policies

A retention Policy is the period of time a Report or Project remains archived before it is permanently deleted from our systems. Retention policies can be applied to completed Reports and Projects, simply by archiving the item.

List of Policies [Add a Policy](#)

Politique de retention 2 mois (RGPD) 🗑️

Retain a Report or Project for 2 months and delete it after.

Applied on 30 Reports and 0 Projects
Deleted on 26 Reports and 0 Projects