Getting started with Whispli

User Guide

For Members and Admins

WHISPLI

Whispli User 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 manage those discussions and collaborate with your team within the platform.

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

Ready to start exploring Whispli? This User Guide will help you learn all you need to know to manage effectively an investigation and collaborate efficiently with your team.

Need more help? Check out our Helpcenter with our FAQ and Best Practices.

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Welcome to Whispli

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

Whispli 2.0

What can I expect when I start using 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 your 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 required to follow a Workflow to organise and prioritise your investigations.

Welcome to Whispli

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.

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Welcome to Whispli

Glossary

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

Report: in the platform, a Report refers to a disclosure you receive, sent by an employee or individual from your Organization.

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.

Dashboard: when logging into your account, you will directly arrive on your Dashboard, which helps bring together all your information, including your current Reports.

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 that an informant can submit information to you through a specific medium (Form, sms, email etc.)

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

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Account Preferences

Update your Settings

Learn how to set up Whispli specific for your individual 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 profile Settings) and the Settings your organisation has. Every user has access to the profile Settings, but only Administrators have access to the Organisation Settings.

Account Preferences

Update your Settings

Your Profile information
From the profile tab, you can edit your:
- ○ Name / Last Name
- ○ Title / Position
- ○ Timezone
- ○ Profile Picture

Change your Password
From here, you'll need to enter your current Password to choose another one. Click on Change Password and you're all set !

Set up 2FA Authentication
2-Factor Authentication is basically like a second "password" than you will need to enter to verify your identity when logging in. It works with Google Authenticator App and adds a security layer to your account.

Customize your email Notifications
Notifications lets you choose what you want to be notified about by email. The default is that you are notified about everything that happens in Whispli, but you can manually choose the specific actions you want a notification for.

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Account Preferences

User Roles

You can have different roles and permissions in Whispli. Learn more on what you can access and do with your role:

Member
By default, all Users are Members. With this role, you will need to be invited to Reports or Projects to have access to them. However, if a Report does not have any owner yet, you're 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, you can access the Pages, Channels and Workflows tabs. You'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, you have a full visibility on your Organization's account. You 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.

Role(s) of this user

☐ Configurator
Configurators can configure Whispli but cannot access any Report or Project. They will also be able to manage all Settings, except billing.

☐ Member
By default, all Users are Members. They will need to be invited to Reports or Projects to have access to them.

◯ Admin (restricted)
Admin (Restricted) users have the same permissions as Admin, but can only access Reports and Projects they are a member of and unassigned reports.

◯ Admin
Admin users have all permissions: they can see all data, manage users, settings and billing.

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Account Preferences

Your Dashboard

Learn about what information your dashboard can provide:

When you log into Whispli, you first arrive on your Dashboard. The goal of the Dashboard is to provide you with an overview of everything you are working on in Whispli. This includes seeing your overall statistics about your activity in Whispli, along with a list of the latest Reports and Projects.

In addition to statistics and the latest activity, in the upper-right hand corner, you can see any new alerts or notifications that you might have received, as well as seeing your past alerts.
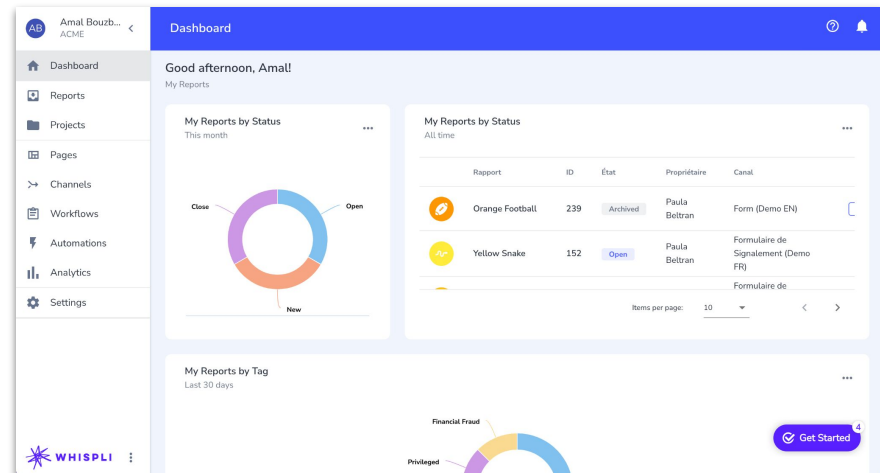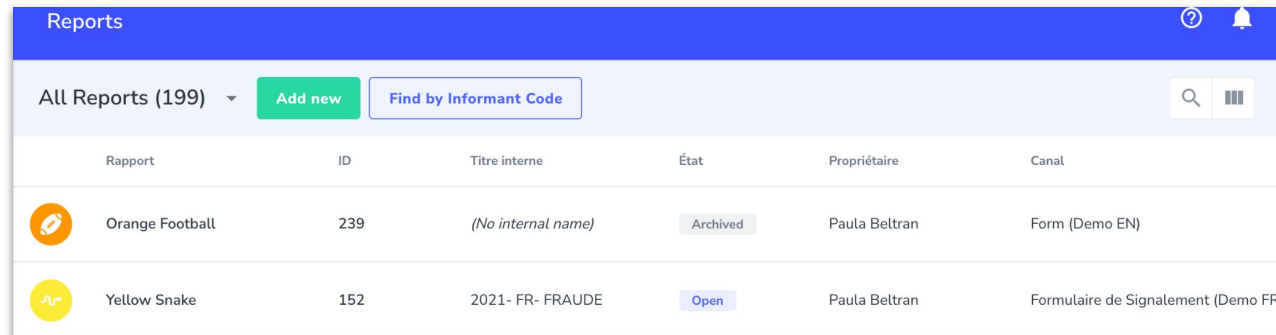
Whispli Basics

Access a Report

Learn how to see all of your Report, sort and search, see a quick view, and click through to each individual Report:

By clicking on the *Reports* menu item on the left hand menu, you will be taken to an overall view of the Reports that are assigned to you. In this view, you can sort on any of the columns by clicking on the column header. There is also a search bar available on the right hand side that will allow you to search on keywords, users, titles, etc.

	Rapport	ID	Titre interne	État	Propriétaire	Canal
	Orange Football	239	*(No internal name)*	Archived	Paula Beltran	Form (Demo EN)
	Yellow Snake	152	2021- FR- FRAUDE	Open	Paula Beltran	Formulaire de Signalement (Demo FR

All Reports (199) Add new Find by Informant Code

Reports

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Whispli Basics

Access a Report

To go into an individual report, click on the *Report ID* or *Informant Name*, which will open up the Report and give you access in one screen to the details of the Report, the Chat with the informant, your Workflow, as well as any related information. In the example below, clicking on *33* or *Navy Hamster* will take you to the entire report.

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Whispli Basics

Add members to your team

When you access an individual Report, you can manually add other Members to help you on the investigation.

Members/Groups

The Members/Groups section is where you can assign the Report to another Case Manager or add other team members to the Report. These are individuals or a User Group that has already been set up.

Members (2) / Groups (1)	∧
MEMBERS	
Paula Beltran Owner	⋮
(DJ) David Job	⋮
GROUPS (2 USERS)	
👥 Compliance (2 users)	⋮

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Whispli Basics

2-way communication

Learn how you can reply back to informants using 2-way, anonymous communication:

Reply

To respond or send a message to an informant, you can click "Reply" and then type out your message. When you are ready to send your message, click on the paper airplane icon located on the right-hand side of the chatbox.

If you send a message in error or want to revise your message, you can retract it. Hover your cursor over the message and you will see an "x" appear. Click and you will be able to retract your message.

> I wanted to provide you an update that we are still investigating this incident and interviewing potential witnesses. I wanted to let you know that we take this seriously and we are putting he resources into understanding what happened here.
>
> AB
>
> a month ago

> **Simo Dinoune** How are things coming along in settings up a time to interview the potential witnesses that you mentioned ?
>
> AB
>
> Internal note · a month ago

Reply   Note

Reply to the informant...

🖇

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Mastering Investigations

Comments with @mentions

In the Activity screen of a Report, as a Case Manager can leave notes for colleagues that are assigned to the Report:

Note

Clicking on "Note" will allow you to leave a message for anyone that is a *Member* of the Report. Notes are not seen by informants and they provide you a way to both communicate and/or document what is happening with an informant.
To leave a Note, click on Note and then type in "@". A dropdown list of the people you can leave a note for will show. You can add multiple people to a note and they will all receive an email alert letting them know they have been mentioned on a Report.

N.B. Notes are shaded yellow, both after they are sent as well as in the chatbox to help better identify them. In case you accidentally send a Note (meant for internal communication) as a Reply (to an informant), you can retract this and resend as a Note.

I wanted to provide you an update that we are still investigating this incident and interviewing potential witnesses. I wanted to let you know that we take this seriously and we are putting he resources into understanding what happened here.

AB

a month ago

Simo Dinoune How are things coming along in settings up a time to interview the potential witnesses that you mentioned ?

AB

Internal note · a month ago

Reply   Note

Write a message to your team...

ⓘ Notes are not sent to Informants

@

WHISPLI

Mastering Investigations

Complete your Workflow

Workflows are the processes that your organization uses to manage investigations.

Workflows can automatically be assigned to a Report or you manually can choose which Workflow to utilise.

Following a Workflow allows you to go through the processes your Organization has set up and help ensure consistency as cases are investigated.

If you're in charge of the Report or part of the investigative team, you'll be required to complete the questions and steps as you progress in your investigation.

Workflow : Workflow-Ethics committee ⚙

1 Ethics committee   **2** Investigation   **3** Conclusion

Is this alert anonymous? *

○ Yes
○ No

Category of the alert after review and analysis of the report *

☐ Theft or Financial Fraud
☐ Bribery
☐ Anti-competitive practices
☐ Violations of environmental legislation
☐ Money laundering and terrorist financing
☐ Conflicts of interest
☐ Psychological and sexual harassment
☐ Other
☐ Does not report to ethics committee

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Mastering Investigations

Update Status

As you progress during your Investigation, you will want to update the status of your Report or Project.

Your Organization has set up different statuses to accurately reflect each stage the Report is currently in. Make sure that the Status applied is relevant - otherwise, you can manually change it within each Report or Project in the top-left corner:

Report ID: **35**   **Ouvert**

🔵 **Blue Mango**
  Original   ⋮

Sexual Assault

Ouvert   ▼

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Mastering Investigations

Create a Project

Learn what a project consists of and how you can use them to organise your Reports:

A Project is a way to organise Reports together for 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.

Projects provide you with an extensive workspace to collaborate with team members, manage multiple Reports together, and add files to your Project.
You can also use a Project to upload a report received outside of the platform (through email, fax, the transcripts/notes of a phone call or a face-to-face meeting).