

## Delegation & Delegation Revocation

Users with Manage permissions on an object can read, create, modify, and update instances of that object. These users can also delegate, revoke delegation, and force workflow transitions. Workflow stages can be delegated to any RiskVision user or team. In order to delegate a stage in the workflow, delegation must be enabled. Delegation and delegation revocation is controlled on a per-stage basis by the **Allow Delegation** option.

It's good practice to add a comment/reason for delegation or revoking delegation in the **Comment** section. The comments added are visible to all users who have read access to the Workflow tab of the object and can view the comments in the **Workflow History** section as show below.

**Name: Default Ticket Workflow**

Legend ■ Current Stage ■ Stages Visited ■ Yet to visit Stage

**1 New** | 2 In Progress | 3 Review | 4 Closed

Since: 2021-05-19 07:30:19

Current Owner(s): [Redacted]

Stage Actions: 1 of 1 needed for moving workflow to "In Progress"  
1 of 1 needed for moving workflow to "Closed"

Force Transition

To use your elevated permission to force workflow transitions, please check the check box to force a transition, and then select the button below for the particular transition that you would like to force.

Accept
Reject
Delegate To
Revoke Delegation

**Comments**

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**Documents**

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**Linked To**

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**Workflow History**

1-2 of 2

Date	Stage	Action	To Stage	Force Transition	User	Target User	Comment
2021-05-19 13:39:49	N/A	Delegated to User(s) : <span style="background-color: #ccc; border: 1px solid #ccc; padding: 2px;">[Redacted]</span>	N/A	No	<span style="background-color: #ccc; border: 1px solid #ccc; padding: 2px;">[Redacted]</span>	<span style="background-color: #ccc; border: 1px solid #ccc; padding: 2px;">[Redacted]</span>	<span style="background-color: #ccc; border: 1px solid #ccc; padding: 2px;">[Redacted]</span>

*The Workflow History section of a delegated workflow.*

The delegation option that is discussed in this section is available for the below objects:



Not all of the below objects will be available in each application.

- Tickets
- Findings
- Incidents
- Exception Requests
- Controls
- Policies

For **Tickets**, **Findings**, **Incidents** and **Exception Requests**, workflow stakeholders can view delegated objects in the **My Tickets Delegated To Others**, **My Findings Delegated to Others**, **My Incidents Delegated to Others** and **My Exceptions Delegated to Others** column of their respective grids.

For **Tickets**, **Findings**, **Incidents**, and **Exception Requests**, stakeholders can perform bulk delegation and delegation revocation from the **More Actions** dropdown list.

The screenshot shows a web application interface for managing tickets. On the left, there is a navigation pane with categories like 'My Tickets', 'My Tickets Delegated To Others', 'By Status', 'By Stage', 'By Type', and 'All Tickets'. The main area displays a table of tickets. A 'More Actions...' dropdown menu is open over the first ticket, showing options: 'More Actions...', 'Synchronize Workflow', 'Batch Edit Tickets', 'Delegate', 'Save as CSV', and 'Customize'. The 'Delegate' option is highlighted with a mouse cursor. The table below has columns for Ticket ID, Title, Type, Owner, Awaiting Action By, Entities, Risk, Progress, Created Time, and In Stage Since.

Ticket ID	Title	Type	Owner	Awaiting Action By	Entities	Risk	Progress	Created Time	In Stage Since
TKT00093	Ticket_01	Audit Finding			N/A	N/A	0%	2019-09-17 16:02:56	2019-09-17
TKT00092	T1	Assigned			N/A	N/A	0%	2019-09-17 16:02:33	2019-09-17

The Delegate option in the More Actions dropdown.

## Delegation

Any stakeholder of a stage that permits delegation can delegate to another user. The workflow designer can allow team Delegation at each stage. For example, the **In Progress** and **Review** stages may allow for delegation, whereas the **Approval** stage might be designed not to allow delegation. The workflow designer can choose another label to describe delegation, such as "Delegated To" or "Transfer Authority" and can select an email template used to notify the delegate.

The screenshot shows a 'Default Ticket Workflow' interface. It includes a legend with 'Current Stage' (dark blue), 'Stages Visited' (light blue), and 'Yet to visit Stage' (grey). Below the legend are four stage buttons: '1 New' (dark blue), '2 In Progress' (light blue), '3 Review' (grey), and '4 Closed' (grey). The 'Since' field shows '2021-05-19 07:30:19'. The 'Current Owner(s)' field is blurred. 'Stage Actions' show '1 of 1 needed for moving workflow to "In Progress"' and '1 of 1 needed for moving workflow to "Closed"'. There is a 'Force Transition' checkbox which is unchecked. A yellow tooltip explains: 'To use your elevated permission to force workflow transitions, please check the check box to force a transition, and then select the button below for the particular transition that you would like to force.' At the bottom, there are four buttons: 'Accept', 'Reject', 'Delegate To' (highlighted with a green box), and 'Revoke Delegation'.

The Delegate To button.

## Delegation Revocation

The original stakeholders can revoke a delegation at any time, regardless of how many times delegation has occurred. This is true regardless of whether the current delegate is the original delegate.

This screenshot is identical to the previous one, showing the 'Default Ticket Workflow' interface. In this view, the 'Revoke Delegation' button at the bottom is highlighted with a green box, while the 'Delegate To' button is no longer highlighted.

The Revoke Delegation button.

