

Managing Workflow Escalation

Workflow stages can be configured to send escalations to the program owner or the stakeholder's manager or both for further action if the workflow does not advance to the next stage within a specified time. Each workflow stage can be configured separately with a number of days before automatic escalation. For example, you might configure the compliance assessment workflow to notify the program owner seven days after a questionnaire enters the Review stage. The notification e-mail will use the Questionnaire Escalation template, and will only be sent if the questionnaire stays in the Review stage for more than seven days.

To configure escalations in a workflow:

1. Go to **Configuration > Workflows**, select a workflow, and click **Details**.
2. Choose a workflow stage, and click **Edit**.

Options

- Remind Stakeholder days after start date; use Email Template: [Preview](#)
- Escalate to program owner days after start date; use Email Template: [Preview](#)
- Escalate to stakeholder's manager days after start date; use Email Template: [Preview](#)

3. From the options section, check the box that is associated with either **Escalate to program owner** or **Escalate to stakeholder's manager** to send notifications. Then enter the number of days after the start of the stage and select the e-mail template from the drop-down list to use for the notification. You have the option to send notifications to both the program owner and the stakeholder's manager.
4. After you finish changing the options, click **Save**.

If the stakeholder does not have a manager, a notification will not be sent to the stakeholder's manager. To establish a manager for the stakeholder, go to the Administration application. Then select the System User page to choose a manager from the Information tab.

In a Policy workflow, selecting the escalate to owner option sends notification to the primary owner of the policy.

If the ticket does not have an owner, configuring a ticket workflow for the escalate to owner option will not send notifications to a recipient.