Managing Workflow Escalation

Workflow stages can be configured to send escalations to the program owner, 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 a compliance assessment workflow to notify the program owner seven days after a questionnaire enters the Review stage. The notification email 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 then click **Details**.

2. Click a workflow stage, then click **Edit**.

The Options section.

3. Check the **Escalate to owner** or **Escalate to stakeholder's manager** to send notifications.

4. Enter the number of days, the date, and whether it should be sent before, after, or on the date.

5. Select the email template from the dropdown list to use for the notification. You have the option to send notifications to both the program owner and the stakeholder's manager.

6. Click **Save**.

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. In a Policy workflow, selecting the **Escalate to Owner** option sends a notification to the policy's primary owner. If a stakeholder does not have a a manager, **Escalate to stakeholder's manager** will not send a notification.

To assign a manager to a stakeholder:

1. Open the RiskVision Administration application.

2. Click the **Users** tab.

3. Click the stakeholder's username to open their account.

4. Click **Edit**.

5. Click the **Manager** dropdown and select the appropriate user.

6. Click **Save**.