

Adding Escalations and Reminders

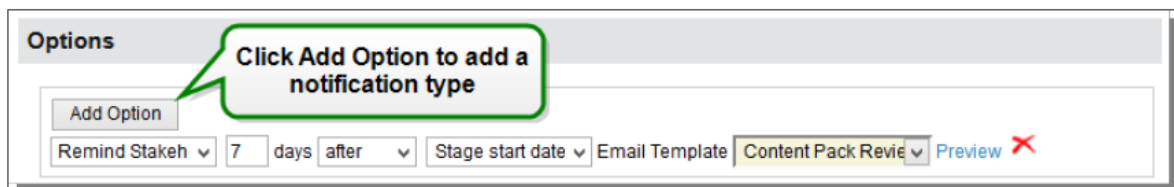
Most of the workflows in RiskVision Policy Manager have default settings for escalation and reminder notifications within each workflow stage. The default settings are provided based on the real and practical use cases. The default reminder and escalation settings for each stage in different workflows are given in the table below:

Workflow	Stages	Default Option Settings
Assessment	Stage 1, Stage 2, and Stage 3	Remind stakeholder 7 days after the workflow stage start date using the Questionnaire Reminder email template.
	Stage 4	No reminder and escalation options.
Exception	Stage 1	No reminder and escalation options.
	Stage 2 and Stage 3	Remind stakeholder 7 days after the workflow stage start date using the Exception Reminder email template.
Incident	Stage 1, Stage 2, and Stage 3	Remind stakeholder 7 days after the workflow stage start date using the Incident Reminder email template.
Ticket	Stage 1, Stage, and Stage 3	Remind stakeholder 7 days after the workflow stage start date using the Ticket Reminder email template.

You can add more escalation and/or reminder options if the default settings mentioned above do not fulfill your criteria.

To add an escalation or reminder option:

1. In the RiskVision, go to **Configuration > Workflows**. The **Workflows** page is displayed.
2. Select the workflow to open its details page.
3. Click **Edit** at the top-right corner of the details page.
4. Click the workflow stage in which you will want to add an escalation or reminder. The details are displayed.
5. Under Options, click Add Option. A new option is added.



6. In the first drop-down list, select the reminder or escalation option.
7. Enter a number in the days field.
8. In the second drop-down list, select one of the following: **on**, **before**, and **after**.
9. In the third drop-down list, select a date type.
10. In the fourth drop-down list, select an email template to notify users for reminder or escalation purposes.

