

Adding Escalations or Reminders

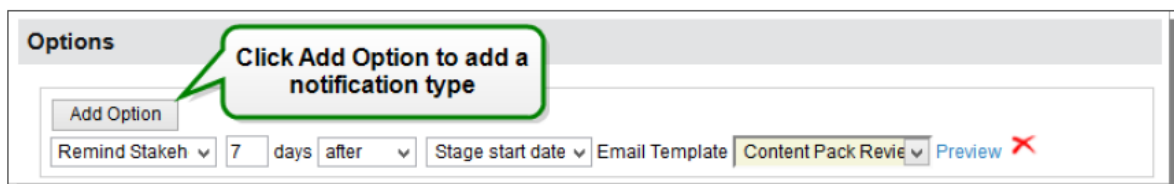
Most of the workflows in RiskVision Compliance Manager have default settings for escalation and reminder notifications within each workflow stage. The default settings are provided based on the real and practical use cases. The default reminder and escalation settings for each stage in different workflows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

Workflow	Stages	Default Option Settings
Assessment	Stage 1, Stage 2, 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
Policy	Stage 1, Stage 2, and Stage 3	Remind stakeholder 7 days after the workflow stage start date using the Policy Reminder email template
Ticket	Stage 1, Stage 2, and Stage 3	Remind stakeholders 7 days after the start date with 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.



The screenshot shows the 'Options' section of a workflow configuration. A callout box with a green border and a speech bubble icon points to the 'Add Option' button. Below the button, there is a form with the following fields: a dropdown menu set to 'Remind Stakeh', a text input field containing '7', a dropdown menu set to 'days after', a dropdown menu set to 'Stage start date', a text input field for 'Email Template' containing 'Content Pack Review', and a 'Preview' button with a red 'X' icon.

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.

