

Module: Escalation Engine

The escalation engine automatically monitors overdue approval requests and runs definable escalation steps. This lets you model reminders, automatic delegations, or reassignments on a time-based schedule.

How it works

- The escalation is controlled by a **Job Queue Entry** that regularly checks all open approval entries.
- For each overdue entry it is checked whether an escalation step is due (based on the "**Overdue Duration**" relative to the approval's due date).
- Escalation steps can be defined at **template level** (apply as default for all steps) and/or at **step level** (override the template setting for that step).
- The highest escalation step already executed is tracked in the approval entry in the field "**Escalation Level**" so that no step is executed twice.

Prerequisites

- The **escalation job queue entry** must be set up and active (see [AWF Setup](#)).
- The approval entries must have a **Due Date** (configurable via "**Due Date Formula**" in the step).

Configure escalation steps

At template level (default for all steps)

1. In the **AWF Workflow Template** → section "**Escalation Steps**".
2. **New**.
3. Fill in the fields:
 - **Step No.:** running number (determines the order).
 - **Description:** description of the escalation step (e.g. "Reminder after 1 day").
 - **Overdue Duration:** date formula relative to the due date (e.g. `<+1D>` = 1 day after due, `<+1W>` = 1 week after due).
 - **Escalation Action:** action that runs when the overdue duration is reached.
 - **Enabled:** Yes/No.

At step level (overrides template level)

1. In the **AWF Step**card → section "**Escalation Steps**".
2. Create steps as described above.
3. If a workflow step has its own escalation steps, the template escalation steps are **not** considered for this step.

Escalation actions

Action	Description
Send Notification	Sends an escalation notification (via the standard BC notification mechanism).
Delegate	Delegates the approval automatically via the BC standard substitute chain (from "Approval User Setup").
Reassign	Reassigns the approval to a defined recipient. Recipient Type and Recipient Code are configured (user or workflow user group).
Custom Action	Runs a custom object (codeunit or report). Optionally the source record can be passed (Pass Source Record).

Configure recipient (for "Send Notification" and "Reassign")

- **Recipient Type**: approver (specific user) or workflow user group.
- **Recipient Code**: user ID or code of the workflow user group.
- For "Reassign", the approval is redirected to the new recipient.
- For "Send Notification", the recipient receives an escalation notification.

Rule-based escalation (optional)

Escalation steps can optionally have a **Rule Group Code** . When set, the escalation step only runs if the rule conditions of the rule group match for the current record.

Due date and escalation

For the escalation to work meaningfully, a **Due Date Formula** must be maintained in the step:

1. In the step: set the field "**Due Date Formula**" (e.g. `<+3D>` = due 3 days after the approval is created).

2. The escalation duration is added on top of the due date: if the due date formula is `<+3D>` and the overdue duration is `<+1D>` the escalation step runs 4 days after the approval is created.

If an approval entry has **no due date** , a prompt for manual entry is shown if necessary.

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