

# How to Custom-Route Your Proposal

For a visual version of this guide, watch this [video](#).

A custom route allows a reviewer within the workflow to send the proposal directly to one or more participants and create an additional step that is not already part of the approval process.

For example, if you require a support memo, or when a committee chair needs to return a proposal to the originator for revisions.

1. While in your proposal, from the Toolbox, click on the “Decision” checkmark and choose “Custom Route”

Your Decision

What would you like to do with this proposal?

Approve       Hold  
 Reject       Suspend  
                  Cancel  
                  Custom Route

Please comment on your decision below.

Do not enter comments yet, you will enter them at a later step

Make My Decision

Decisions

Custom Route

2. Click on “Make My Decision.” This window appears:

My Pending Custom Route

Custom Route (requested by Rebecca Romine)

Step Name:  
Custom Route

Participants

Rules

Decisions

Deadlines/Reminders

Please comment on this custom route

Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.

If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.

Preview Custom Route

Request Custom Route    Cancel Custom Route

3. Choose to whom you are routing the proposal:

The screenshot shows a form for configuring a routing step. At the top, there is a field labeled "Step Name:" with the text "Custom Route" inside. Below this is a dropdown menu currently set to "Participants". At the bottom left of the form is a button labeled "Add Participant", which is highlighted with a red arrow pointing to it from the right.

a. **NOTE:** To return the proposal to the proposer, choose "Role Types" scroll down to "Originator" and **skip to #7.**

The screenshot shows a dropdown menu titled "Role Types" which is expanded. The menu items are: Academic Programs, Academic Programs - Program Appro, Academic Programs Archive, Academic Senate Chair, Academic Senate Member, Library Dean, Originator, and President. The "Originator" option is highlighted with a yellow background. A red arrow points downwards from the top of the list towards the "Originator" option.

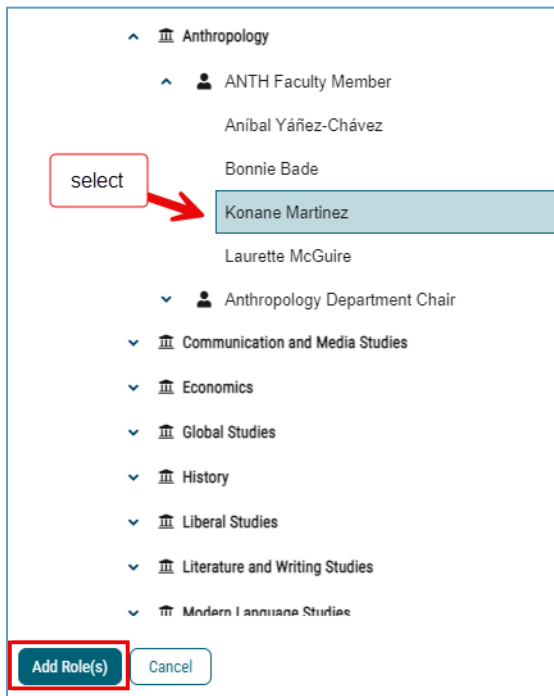
4. Choose "Hierarchy" and select from the "CSU San Marcos" dropdown

The screenshot shows a configuration screen titled "Who is involved on this step?". It features several expandable sections: "Role Types", "Hierarchy", "CSU San Marcos", "Chancellor's Office", and "Entity Name". The "Hierarchy" section is expanded, and a red arrow points to it. Within the "Hierarchy" section, the "CSU San Marcos" dropdown is also expanded and highlighted with a red box. At the bottom of the screen are two buttons: "Add Role(s)" and "Cancel".

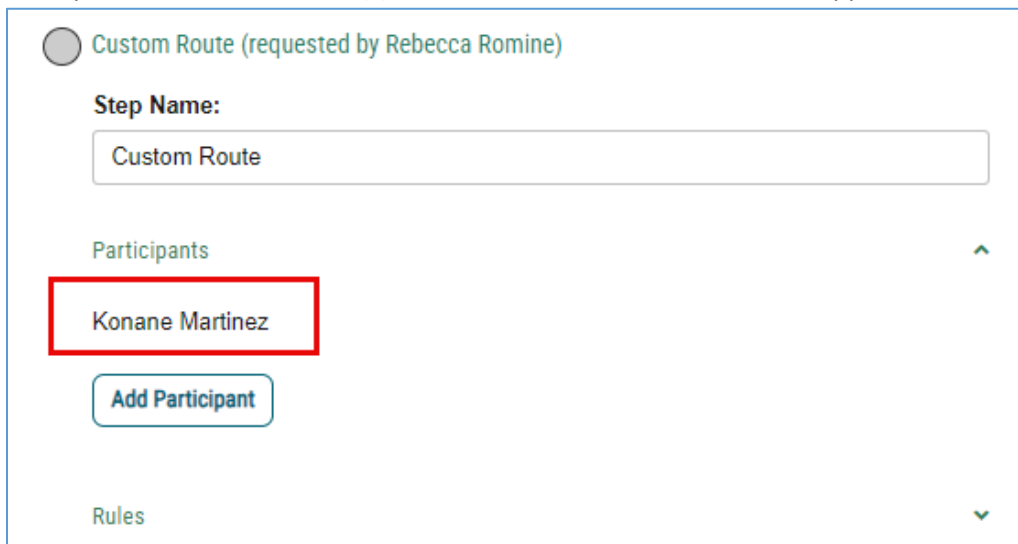
5. Scroll down to the list of colleges: click on the college dropdown to find the department

The screenshot shows a list of colleges, each with a dropdown arrow to its left. The list includes: VP for Finance and Administrative Services, VP for Students Affairs, APC\_Academic Policy Committee, College of Business Administration, College of Education, Health and Human Services, College of Humanities, Arts, Behavioral and Social Sciences, College of Science, Technology, Engineering and Mathematics, and Graduate Studies. The dropdown arrow for "College of Humanities, Arts, Behavioral and Social Sciences" is highlighted with a red box. A red arrow points downwards from the top right of the list towards the highlighted dropdown.

6. Then click on the faculty member or Dept Chair within that department to assign the custom route:



7. After you select the individual(s), click “Add Roles”, then their name appears under “Participants”



You can select *multiple* faculty members from multiple departments.

NOTE: If you accidentally select someone and want to delete them before you send the custom route:

1. Click the "Add Participant" link for the Custom Route.
2. De-select the user you wish to remove by clicking the name/Role/Role Type to remove the highlight.
3. Click the "Add Participant(s)" button.

This will remove the user selected in error from the Custom Route step and then you can complete the Custom Route request.

8. Next: Choose Rules:

Allow comments, and you might choose to uncheck the “Edit Proposal” option.

Rules

**What work is allowed on each Proposal?**

Edit Proposal

Make Comments

**Is a signature required?**

Yes

**Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?**

Yes

**Who can view the comments during this step?**

Every user involved in the proposal at any step

DISREGARD: CSUSM does not use this function

9. Choose Decisions:

“Require 100% participation and unanimous approval”

AND

“Proposal should come back to this step”

Decisions

**What type of decision is this?**

Requires 100% participation and 100% approval.

Requires 100% participation and  % for approval.

Requires  % participation and majority approval.

**What kind of decision flags will you allow to be used on this proposal?**

Hold  Suspend

Cancel

**Where will the proposal go after the custom route?**

Proposal should come back to this step.

Proposal should advance to the next step.

**Who should be notified when the step is completed?**

*If Approved:*

*If Rejected:*

(No need to set Deadlines/Reminders unless you wish)

Deadlines/Reminders

10. Enter any comments you wish to send to the participant in the comments field

Custom Route (requested by Rebecca Romine)

**Step Name:**

Participants ▼

Rules ▼

Decisions ▼

Deadlines/Reminders ▼

**Please comment on this custom route**

Please revise the proposal addressing the comments below. Once your revisions are complete, approve the proposal to return it to the committee.

*You can type a note to the participant in the comment box.*

11. **NOTE: Once you click on “Request Custom Route”** it will not immediately be sent to your recipient. It first must be “approved” by Academic Programs.

*Note: By selecting the button below, you are requesting a custom route on this proposal. This request is pending and must be approved by an Administrator. During this time, you may make changes to your custom route request.*

*If your route is approved, the proposal may leave the current step immediately to begin its custom route. Depending on the options you selected, this item may return to you when the custom route is complete, or it may continue in the workflow.*

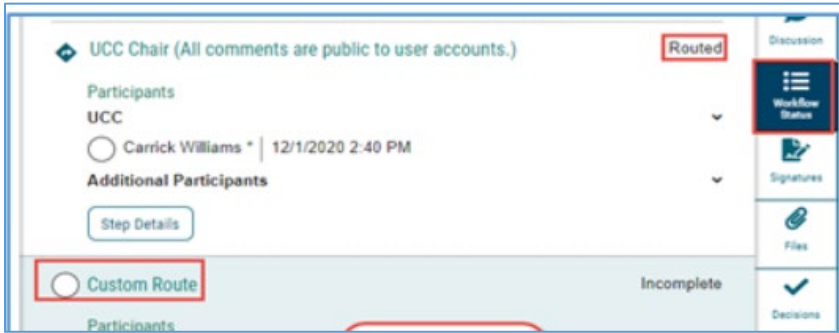
12. After Academic Programs “approves” your request, the notice will appear in your Dashboard:

**My Recent Notifications** ▲ ▼

Apr 24 **Proposal Routed:** The proposal, BIOL - 355 - Pre-Medical Professions, has been routed, and is no longer your task. [Click here](#) to view the proposal.

Apr 24 **Request Response:** An Administrator has approved the request to route the proposal, BIOL - 355 - Pre-Medical Professions. [Click here](#) to view the proposal.

a. When you click back on your proposal and view the Workflow Status, it will indicate your custom route:



b. If you choose multiple recipients, the proposal will move onto your department chair only after every participant has "approved."

## Summary

After following the steps above, your request should match the following:

The screenshot shows a configuration form for a workflow step. The 'Step Name' field contains 'Custom Route'. The 'Participants' section has a dropdown arrow and the text 'or desired participant' in a red box with an arrow pointing to the 'Originator' label. Below this is an 'Add Participant' button. The 'Rules' section has a dropdown arrow and the question 'What work is allowed on each Proposal?' with checked boxes for 'Edit Proposal' and 'Make Comments'. Below that is the question 'Is a signature required?' with an unchecked 'Yes' box. Then 'Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?' with an unchecked 'Yes' box. The 'Who can view the comments during this step?' dropdown is set to 'Every user involved in the proposal at any step'. The 'Decisions' section has a dropdown arrow and the question 'What type of decision is this?' with radio buttons for 'Requires 100% participation and 100% approval.', 'Requires 100% participation and [ ] % for approval.', and 'Requires [ ] % participation and majority approval.'. Below that is the question 'What kind of decision flags will you allow to be used on this proposal?' with checkboxes for 'Hold', 'Suspend', and 'Cancel'. Finally, 'Where will the proposal go after the custom route?' has radio buttons for 'Proposal should come back to this step.' (selected) and 'Proposal should advance to the next step.'