

## How To Custom Route a Proposal: Instructions for Committee Chair

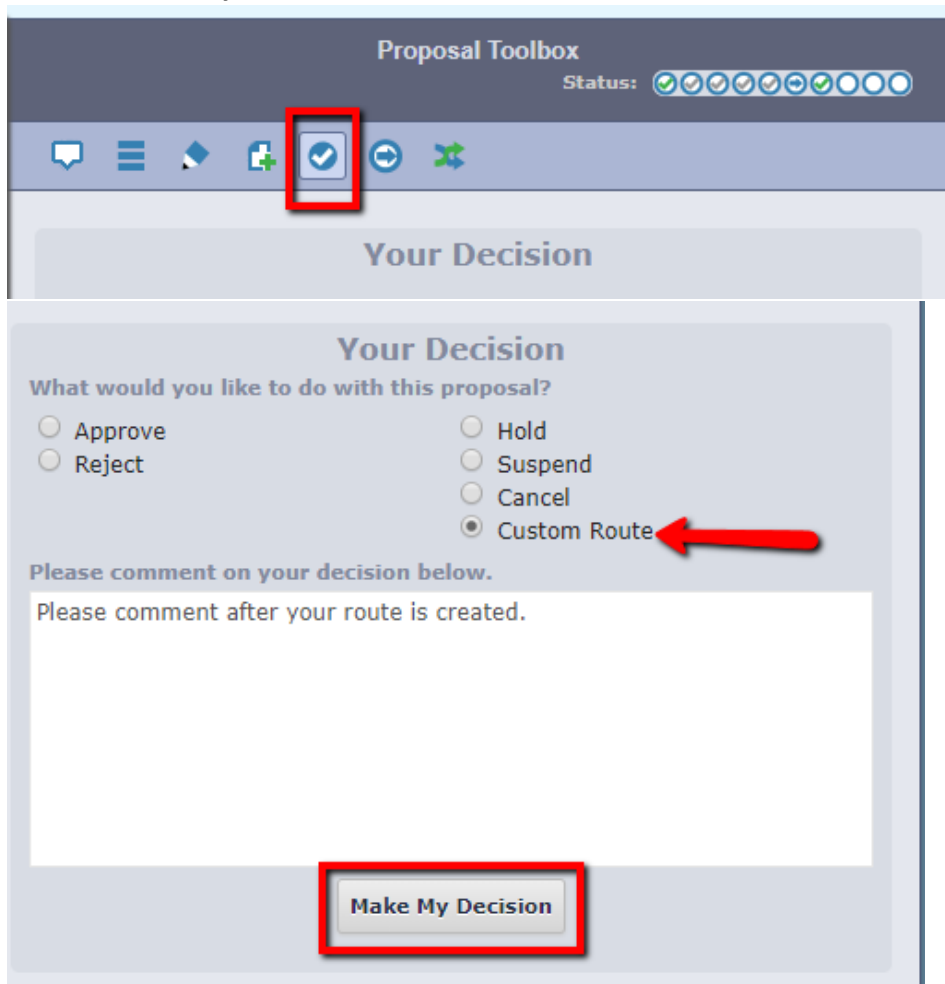
Custom Route to Originator for “revise & resubmit” is an alternative option to the Reject function.

The Custom-route function “leap-frogs” the proposal back to the committee once the originator makes the changes. Reject function moves the proposal back up the chain of approval steps.

**NOTE:** a proposal can custom route from a particular step only one time; so you'll want to make sure that everyone has reviewed and given their input before requesting the custom route. Once the originator makes the corrections, the proposal will go directly back to the committee. **But the committee cannot route the proposal a second time.**

(In that case you would have to use the "reject" function OR make comments and edits “on behalf of” the originator.)

1. Click on “**Make My Decision**” and choose “**Custom Route**”



The screenshot displays the 'Proposal Toolbox' interface. At the top, the status is shown as a series of green and blue circles. Below this is a toolbar with several icons, including a checkmark icon which is highlighted with a red box. The main section is titled 'Your Decision' and contains the question 'What would you like to do with this proposal?'. There are five radio button options: 'Approve', 'Reject', 'Hold', 'Suspend', and 'Cancel'. The 'Custom Route' option is selected, indicated by a red arrow pointing to it. Below the options is a text input field with the prompt 'Please comment on your decision below.' and a sub-prompt 'Please comment after your route is created.'. At the bottom of the form, the 'Make My Decision' button is highlighted with a red box.

2. This window appears:

**My Pending Custom Route**

Custom Route (requested by Gayle Feallock)

Step Name:

- 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.

3. First Choose to Whom you are routing the proposal:

**Custom Route (requested by Gayle Feallock)**

Step Name:

Participants

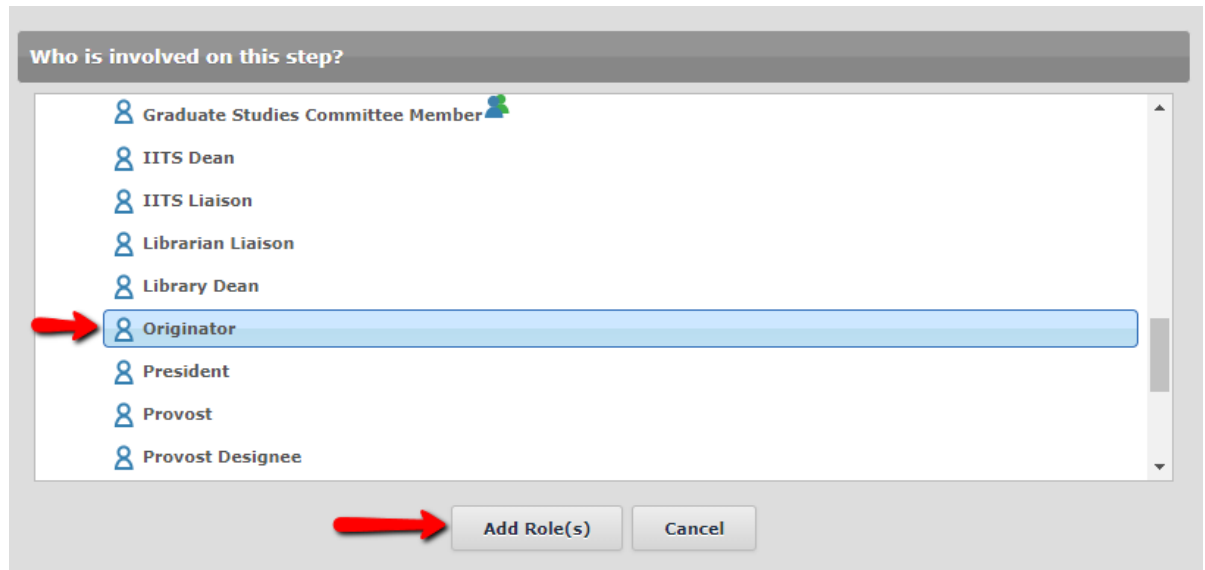
←

a. Choose "ROLE TYPES"

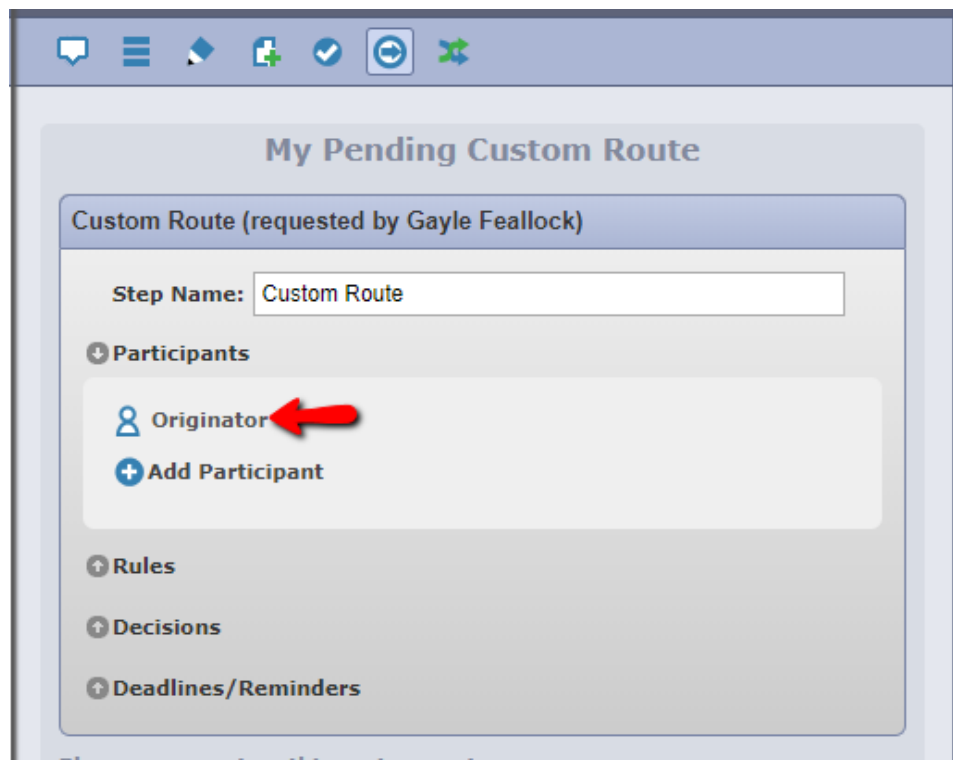
**Who is involved on this step?**

- Role Types ←
- Hierarchy

Scroll down to Originator, click on Add Role



And it shows this window:



**NOTE:** If you accidentally select a wrong person or role 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 in order 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.

- b. **Choose Rules:** Choose both **Edit** and **Make Comments** so that originator can do both. Choose every user in the proposal so that everyone can see the comments.

**Rules**

What work is allowed on each Proposal?

- Edit Proposal
- Make Comments

Is a signature required?

Yes **Disregard**

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

- c. **Choose Decisions:** Choose **Approve** and Choose “**Proposal should come back to this step**” (meaning the committee).

**Decisions**

What type of decision is this?

- Approve / Reject 100% for approval
- Vote:  % for approval

**Choose Approve**

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:

- d. no need to set Deadlines/Reminders:

**Deadlines/Reminders**

**NOTE: Once you click on “Request Custom Route” it will not immediately be sent to your recipient – the Originator. The request 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.

[Edit Custom Route](#) [Request Custom Route](#) [Cancel Custom Route](#)

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

### My Dashboard

Tasks: 12

#### My Recent Notifications

**Feb 12** **Proposal Routed:** The proposal, MATH - 100 - TEST - Mathematical Ideas-custom route, has been routed, and is no longer your task. [Click here to view the proposal.](#)

Then, when you click back on the proposal and **view the Status**, it will indicate your custom route:

### Proposal Toolbox

Status: [Progress Indicators]

**Proposal History**

<b>UCC Chair</b>	Status: <b>Routed</b>
<b>Participants</b> <ul style="list-style-type: none"><li>Shahed Sharif 10/3/2018 10:40 PM</li><li>Criselda Yee (System Administrator) 10/4/2018 10:26 AM</li></ul>	<b>Activity</b> <ul style="list-style-type: none"><li>Required for Approval: 100% required</li><li>Date Completed: 10/4/2018 10:26 AM</li><li>Changes: No</li><li>Comments: Yes</li></ul>
<b>Custom Route</b>	Status: <b>Incomplete</b>
<b>Participants</b> <ul style="list-style-type: none"><li>Amy Carney</li></ul>	<b>Activity</b> <ul style="list-style-type: none"><li>Required for Approval: 100% required</li><li>Time Spent: 41 minutes</li><li>Changes: No</li><li>Comments: No</li></ul>
<b>UCC Chair</b>	Status: <b>Incomplete</b>

After she revises and again "approves" her proposal, it will go back to the Chair.