

## How to Custom-Route Your Proposal

When you want to have someone who is not in the approval process review the proposal, try a “custom route.” For example, if you require a support memo, or simply want a colleague to give it a look.

1. While in your proposal, from the Toolbox, click on “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.

Enter comments after route request is created

Make My Decision

Discussion  
Workflow Status  
Signatures  
Files  
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

This is my request for your feedback for the XXX course. I am happy to answer any questions you may have about this course.  
Indicate your support/opposition by replying in the comments section. Then, please "Make Your Decision" and approve after your review.

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

Discussion  
Workflow Status  
Signatures  
Files  
Decisions  
Custom Route  
Crosslistings  
Proposal Lookup

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" entered. Below this is a dropdown menu labeled "Participants" with an upward-pointing arrow. At the bottom of the form is a button labeled "Add Participant" with a red arrow pointing to it from the right.

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

The screenshot shows a dropdown menu titled "Role Types" with a red box around the title. The menu is expanded to show a list of roles: "Academic Programs", "Academic Programs - Program Appr", "Academic Programs Archive", "Academic Senate Chair", "Academic Senate Member", "Library Dean", "Originator", and "President". The "Originator" role is highlighted with a yellow background. A red arrow points downwards from the top of the list towards the "Originator" role.

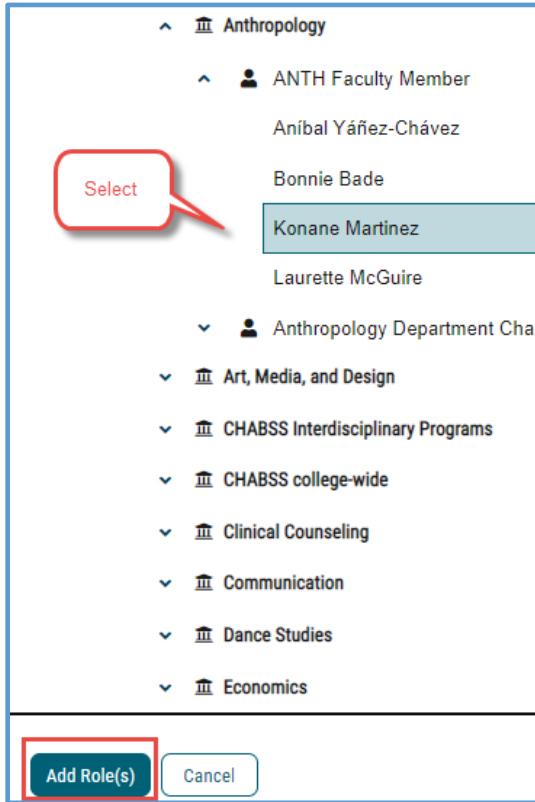
4. Choose "Hierarchy" and select from the "CSU San Marcos" dropdown

The screenshot shows a dialog box titled "Who is involved on this step?". It has two main sections: "Role Types" (collapsed) and "Hierarchy" (expanded). A red arrow points to the "Hierarchy" section. Under "Hierarchy", there are two dropdown menus: "CSU San Marcos" (circled in green) and "Chancellor's Office" (collapsed). At the bottom of the dialog are two buttons: "Add Role(s)" and "Cancel".

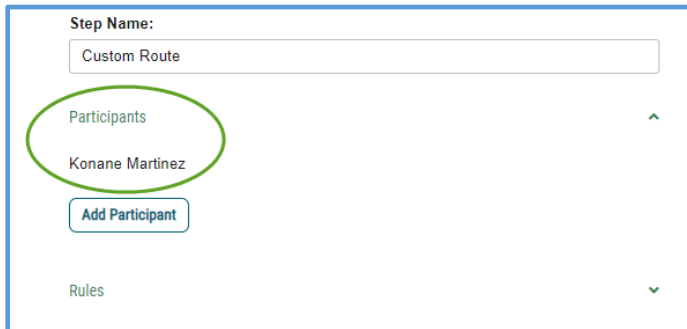
5. Scroll down to the list of Colleges: click on the college dropdown to find the department

The screenshot shows a list of colleges, each with a dropdown arrow to its left. The colleges listed are: "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", "Graduate Studies", and "Undergraduate Studies". A red arrow points to the dropdown arrow next to "College of Humanities, Arts, Behavioral and Social Sciences".

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 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.

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

DISREGARD: CSUSM does not use this sig function

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

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:  Add Participant

If Rejected:  Add Participant

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

Deadlines/Reminders

10. **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.*

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

**My Recent Notifications**

Dec 2 **Modified Proposal:** Yongjie Zheng has added a file to the proposal, EE - 321 - Classical Electromagnetism. [Click here](#) to view the proposal.

Dec 1 **Proposal Routed:** The proposal, SE - 481 - Software Project Planning and Management, has been routed, and is no longer your task. [Click here](#) to view the proposal.

Dec 1 **Request Response:** An Administrator has approved the request to route the proposal, SE - 481 - Software Project Planning and Management. [Click here](#) to view the proposal.

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

UCC Chair (All comments are public to user accounts.) Routed

Participants  
UCC

Carrick Williams \* | 12/1/2020 2:40 PM

Additional Participants

Custom Route Incomplete

Participants



Discussion  
**Workflow Status**  
Signatures  
Files  
Decisions

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

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

**Step Name:**  
Custom Route

**Participants** ^

 Originator  or desired participant

**Add Participant**

**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 ▼

**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.
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