

## About Custom Routes

- An optional and additional ad hoc step
- Enable you to bring users into the proposal that are not included in the approval process
- Only able to be used once per approval step
- Can be sent to multiple users at one time
- Available to use when the proposal is at a step requiring your decision
- Require system administrator approval

## Things to consider before you start:

Which user(s) do you want to send the proposal to? You're only able to request one custom route per step but will be able to select multiple users. You may want to include yourself as a user to receive the custom route.

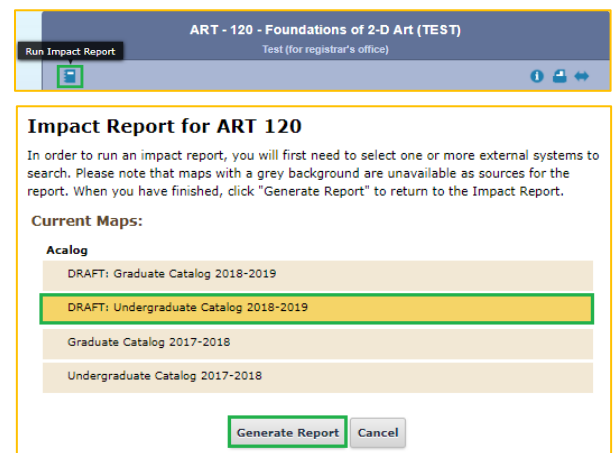
After the receiving user reviews the proposal, do you want it to come back to you? You'll have the option to either have the proposal return to you or advance in the approval process if approved. We recommend having the proposal return to you for your review before inputting a decision.

Do you want to create a deadline for feedback? You'll be able to set a deadline and the default decision (either approve or reject) if you don't receive a response within the time period. Contact the Associate Dean if the deadline passes.

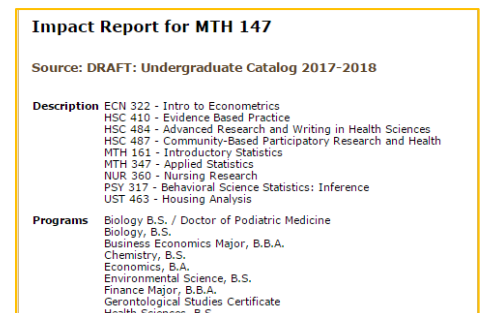
Receiving users will only be able to comment on the proposal and will not be able to edit the proposal.

## Run the impact report

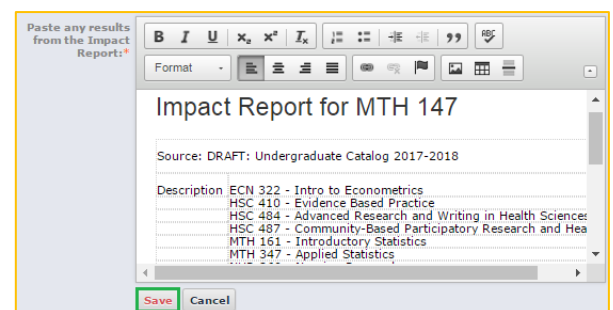
1. Click the "Run Impact Report" icon
2. Click the draft catalog and click the "Generate Report" button



- If the course is listed in the description, it is likely a co-requisite or pre-requisite in the course description. If the course is listed in the program, it is in the curriculum.
- The UCC chair requires feedback from all departments listed on the impact report.



3. Copy and paste the Impact Report results in the corresponding text box on the proposal form
4. Click "Save" after editing each field
5. Mark any other catalog revisions you'd like to propose and upload any files before requesting the custom route



## Request a custom route

6. Click on the “Decisions” icon (a circle with a check) in the Proposal Toolbox

7. Select the “Custom Route” radio button

8. Click the “Make My Decision” button. Note that the Proposal Toolbox moves from the “Decisions” icon to the “Custom Route” icon at this point.

9. Click “Participants”

10. Click “Add Participant,” click “Hierarchy” and navigate to the committee the user belongs to. Committee chairs/agenda administrators will have an asterisk next to their name. Proposals can only be custom routed to users who are members of a committee. If the user is not in the hierarchy, please contact the Office of the University Registrar.

11. Select the user(s)

*Note: If you accidentally added a user and would like to remove them, simply click the name again. The blue bar around the name will disappear.*

12. Click “Add Role(s)”

Proposal Toolbox

Status:

**Your Decision**

What would you like to do with this proposal?

Approve  Hold

Reject  Suspend

Cancel  Custom Route

Please comment on your decision below.

Please comment after your route is created.

**Make My Decision**

Proposal Toolbox

Status:

**My Pending Custom Route**

Custom Route (requested by Brittany Ankrom)

Step Name: Custom Route

**Participants**

**Add Participant**

Who is involved on this step?

- Honors Council Member
- OUR Processing
- Amy Powell
- Brittany Ankrom \*
- Jennifer Stoneking**
- Kevin Neal
- Provost's Office
- Registrar
- Steering Committee Member

**Add Role(s)** Cancel

## Add access to make comments

13. Click “Rules”

14. Check “Make Comments”

We do not use a signature, so please don't check that option.

**Rules**

What work is allowed on each Proposal?

Edit Proposal

Make Comments

Is a signature required?

Yes

## Choose if the proposal will return or advance after the custom route

The default setting is for the proposal to advance to the next step. If you'd like for the proposal to come back to your step after the custom route, you'll need to change the default setting.

15. Click “Decisions”

16. Select “Proposal should come back to this step” or “Proposal should advance to the next step.” Best practice is for the proposal to come back to this step.

*Note: If you choose “Proposal should advance to the next step,” you will need to “approve” the proposal after the custom route is approved by a system admin. The proposal will not advance in the custom route until you have approved it.*

**Decisions**

What type of decision is this?

Approve / Reject 100% for approval

Vote:  % for 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.

### Set a deadline (optional)

17. Click “Set Deadline” and input the days as applicable. Note that if you set a deadline, users in the approval process along with the receiving user will be notified if the deadline has passed.
18. Select whether you’d want to “Automatically Reject” or “Automatically Approve” the proposal if the receiving user(s) does not input a decision

The screenshot shows a form titled "Deadlines/Reminders". It contains the following sections:

- Would you like to set a deadline for this step?**
  - Set Deadline
  - Move Step after  days.
  - Send reminder  days(s) before deadline.
- What should happen if the deadline passes?**
  - Automatically Reject
  - Automatically Approve
- Who should you notify when the deadline is passed?**
  - [+ Add Participant](#)
- Would you like to set a timed reminder for this step?**
  - Send every  days(s).
  - Send after  days(s).

### Complete request

19. Enter instructions to the department chairs in the comments field
20. Click the “Request Custom Route” button. The request will need to be approved by a system administrator in the Office of the University Registrar before the user receives the proposal.

The screenshot shows a form titled "Please comment on this custom route". It contains the following sections:

- A text input field labeled "Enter comment here".
- Notes:** 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.
- Buttons: [Preview Custom Route](#), [Request Custom Route](#) (highlighted with a green box), [Cancel Custom Route](#)

### Cancel the custom route (if applicable)

21. If the proposal hasn’t been approved by a system administrator yet, open up the proposal and click the “Custom Route” icon. Click “Cancel Custom Route” button. The user who initiated the custom route may cancel it.
22. If the proposal has already been approved by a system administrator, contact the Office of the University Registrar.

Updated: 8/18/17

The screenshot shows a form titled "My Pending Custom Route". It contains the following sections:

- Step Name:
- Participants
- Rules
- Decisions
- Deadlines/Reminders
- Buttons: [Preview Custom Route](#), [Cancel Custom Route](#) (highlighted with a green box)