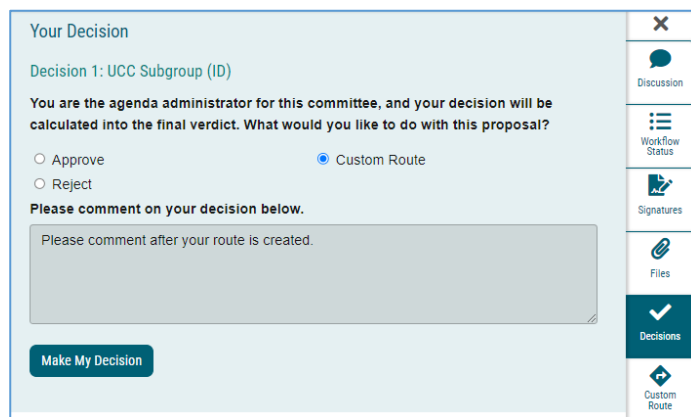


Start here » I want to send this proposal to: [the originator](#) or [a committee](#)

How to Custom Route Proposals to the Originator

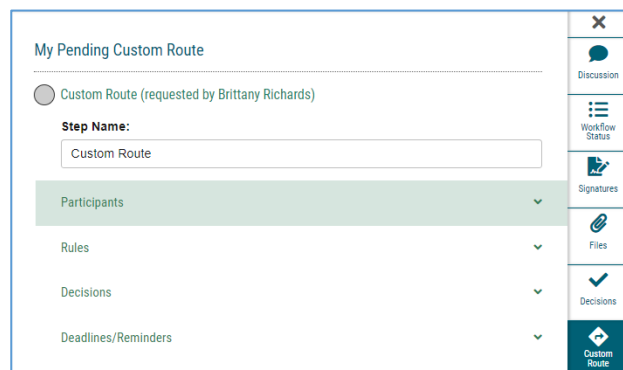
Request a custom route

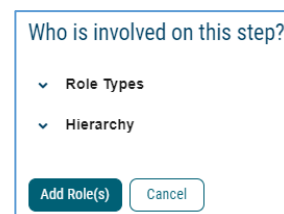
1. Click on the “Decisions” tab on the floating menu on the right
2. Select the “Custom Route” radio button
3. Click the “Make My Decision” button



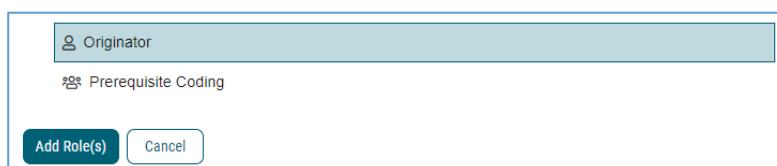
Participants Settings

4. Click “Participants” to open up the section
5. Click the “Add Participant” button
6. Click the down arrow next to “Role Types”





7. Scroll down to find and click “Originator”
8. Click “Add Role(s)” button



Rules Settings

9. Click "Rules" to open up the section

Rules

What work is allowed on each Proposal?

- Edit Proposal
- Make Comments

10. Check "Edit Proposal" and "Make Comments" boxes

Decisions Settings

11. Click "Decisions" to open up the section

Decisions

What type of decision is this?

- Require 100% participation and unanimous approval.
- Require 100% participation and % for approval.
- Require % 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:

12. Select "Proposal should come back to this step"

Reminders Settings

13. Click "Deadlines/Reminders" to open up the section

14. Enter in how often you want the reminder to go out and when the reminder emails should begin (i.e. send every 4 days after 7 days)

Deadlines/Reminders

Would you like to set a deadline for this step?

- Set Deadline

Would you like to set a timed reminder for this step?

Send every days(s).

Send after days(s).

Complete request

15. Enter instructions to the originator in the comments field

16. 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.

Please comment on this custom route

Please upload new syllabus]

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.

Updated: 7/26/23

How to Custom Route Proposals to a Committee

Request a custom route

1. Click on the "Decisions" tab on the floating menu on the right
2. Select the "Custom Route" radio button
3. Click the "Make My Decision" button

The screenshot shows a form titled "Your Decision" for "Decision 1: UCC Subgroup (ID)". It asks the user to choose between "Approve", "Reject", and "Custom Route". The "Custom Route" option is selected. Below the radio buttons, there is a text area for comments with the placeholder "Please comment after your route is created." and a "Make My Decision" button. On the right side, there is a vertical navigation menu with icons for Discussion, Workflow Status, Signatures, Files, Decisions, and Custom Route.

Participant Settings

4. Click "Participants" to open up the section
5. Click the "Add Participant" button
6. Click the down arrow next to "Hierarchy" (**not "Role Types"**) and navigate to the committee
7. Select the committee
8. Click "Add Role(s)"

The screenshot shows the "My Pending Custom Route" settings page. It displays a "Step Name" field with "Custom Route" entered. Below this, there are expandable sections for "Participants", "Rules", "Decisions", and "Deadlines/Reminders". The "Participants" section is currently expanded, showing an "Add Participant" button.

The screenshot shows the "Who is involved on this step?" selection screen. It has two main sections: "Role Types" and "Hierarchy". Under "Hierarchy", "Cleveland State University" is expanded, and "Admissions and Standards" is selected. There are "Add Role(s)" and "Cancel" buttons at the bottom.

Rules Settings

9. Click "Rules" to open up the section
10. Check the "Make Comments" box
11. Check "Yes" under the "Is agenda available?" question

The screenshot shows the "Rules" settings page. It has several sections: "What work is allowed on each Proposal?" with checkboxes for "Edit Proposal" and "Make Comments" (checked); "Is a signature required?" with a "Yes" checkbox (unchecked); "Is agenda available? Does this step involve a committee situation where one person will vote on behalf of others?" with a "Yes" checkbox (checked); and "Who can view the comments during this step?" with a dropdown menu set to "Every user (login not required)".

Decisions Settings

12. Click “Decisions” to open up the section

Decisions ^

What type of decision is this?

Require 100% participation and unanimous approval.

Require 100% participation and % for approval.

Require % 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:**

13. Select “Proposal should come back to this step”

Reminders Settings

17. Click “Deadlines/Reminders” to open up the section

18. Enter in how often you want the reminder to go out and when the reminder emails should begin (i.e. send every 4 days after 7 days)

Deadlines/Reminders

Would you like to set a deadline for this step?

Set Deadline

Would you like to set a timed reminder for this step?

Send every days(s).

Send after days(s).

Complete request

14. Enter instructions to the committee in the comments field

Please comment on this custom route

Please review this proposal|

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.

15. 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.

Updated: 7/26/23