Request a Custom Route

1. In the “Decisions” tab of a course proposal, select “Custom Route” and click “Make My Decision”
2. Rename the Custom Route Step Name if you wish
3. Click “Participants”
   a. Click “Add Participant,”
   b. Click on “Role Type” to custom route to role(s) already defined in your course’s workflow or click “Hierarchy” to custom route to individual persons. Use the hierarchy tree to drill down to identify the right person
   c. Click “Add role(s)”
4. Click “Rules”
   a. Select whether the users involved in this custom route will have the ability to edit the proposal or make comments.
   b. Do not require a signature
   c. Determine who can view the comments for this ad hoc step.
5. Click “Decisions”
   a. Select “Require 100% participation and unanimous approval”
   b. Determine if you wish for the participant(s) in this step to be able to select anything other than Approve or Reject
      i. Further explanations on the different types of the decision can be found at the end of this document
   c. Determine if the “Proposal should come back to this step” or “Proposal should advance”
   d. Determine if the “Proposal should come back to this step” or “Proposal should advance” once the custom ad hoc step is complete
   e. You may select users to be notified when the step is completed and you may add different users for approved and rejected steps
   f. Note: A user may not create another custom route from a custom route step.

6. Click “Deadlines/Reminders”
   a. Click “Set Deadline” if you wish to set up a deadline. 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
   b. Select whether you’d want to “Automatically Reject” or “Automatically Approve” the proposal if the receiving user(s) does not input a decision
   c. Determine if reminders are to be sent to the users involved on the step

7. Complete Request
   a. Enter a comment for the participant in the ad hoc step
   b. You may preview the Custom Route you just created by clicking “Preview Custom Route”
   c. Click the “Request Custom Route” button. The request will need to be approved by a system administrator before the user receives the proposal.
Explanations of the different types of decisions

- **Approve:** Proposal will advance to the next step. Entering a comment is optional when selecting Approve.
- **Reject:** Proposal will return to the previous step. A comment will be required when choosing this decision.
- **Hold:** Submits a request to a system administrator for the proposal to remain on its current workflow step. A comment will be required when choosing this decision. If approved, the proposal will stay on its current step until the hold is released by an administrator. The participant(s) on the step can continue to edit the proposal. If the administrator rejects the request, the proposal will remain on the current step awaiting a decision.
- **Suspend:** Submits a request to a system administrator for the proposal to remain on its current workflow step. A comment will be required when choosing this decision. If approved, the proposal will remain on the current step until the suspension is released by an administrator. Unlike the “Hold” status, the participant(s) on the step cannot work any further on the proposal. If the administrator rejects the request, the proposal will remain on the current step awaiting a decision.
- **Cancel:** Submits a request to a system administrator to cancel the proposal. If the administrator approves the cancel request, the proposal will be referred to the originator. The originator may then re-launch the proposal or cancel it. If the administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.