

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.

Your Decision

What would you like to do with this proposal?

Approve Hold

Reject Suspend

Custom Route

Please comment on your decision below.

Please comment after your route is created.

Make My Decision

Hierarchy

- University of California Merced
 - General Education Analyst
 - General Education Executive Committee
 - General Education Subcommittee
 - Notification Group
 - Registrar
 - Alvin Cha
 - Brenda Rojas
 - Joshua Reinhold**
 - Katherine Brown

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 (login not required)

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. to the next step” 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.

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:

Add Participant

Add Participant

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

Deadlines/Reminders

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).

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.

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.

Preview Custom Route

Request Custom Route

Cancel Custom Route

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