

## Requesting a Custom Route

1. Navigate to the Decisions tab and select Custom Route > Make My Decision.

The screenshot shows a 'Your Decision' form. Under the heading 'What would you like to do with this proposal?', there are five radio button options: 'Approve', 'Reject', 'Hold', 'Suspend', and 'Cancel'. The 'Custom Route' option is selected and highlighted with a red box. Below this is a text area for 'Please comment on your decision below.' with the placeholder text 'Please comment after your route is created.' A 'Make My Decision' button is at the bottom left, also highlighted with a red box. On the right side, there is a vertical sidebar with icons for 'Discussion', 'Workflow Status', 'Signatures', 'Files', 'Decisions', and 'Custom Route'. The 'Decisions' icon, which has a checkmark, is highlighted with a red box.

2. Select Participant(s) whom you would like to access/edit the proposal > Add Participant.

### My Pending Custom Route

The screenshot shows the 'My Pending Custom Route' section. It features a radio button next to the text 'Custom Route (requested by Paul Berres)'. Below this is a 'Step Name:' label followed by a text input field containing 'Custom Route'. Underneath is a 'Participants' section with an upward-pointing arrow. At the bottom of this section is an 'Add Participant' button, which is highlighted with a red box.

- 2b. Select the individual from the Hierarchy dropdown to bring the person into the proposal workflow.

### Who is involved on this step?

▼ Role Types

▼ Hierarchy

- 2c. Search the Hierarchy to locate the appropriate school or department to select the correct individual to whom the proposal should be Custom Routed. Once you find the

correct person, click their name and then click Add Role(s). You can add multiple people if needed.

^ 👤 Registrar - Curriculum

Jennifer Phillips

Paul Berres

▼ 👥 Registrar Staff - URO Courses  
*Registrar Staff - URO Courses*

Add Role(s) Cancel

3. Set up the Rules for the Custom Route. Check Edit Proposal and Make Comments. Do not check signature required box or agenda available.

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) ▼

4. Set up the Decision components.

- a. What type of decision is this? - Select Requires 100% participation and 100% approval [top outlined block]
- b. What kind of decision flags will you allow to be used on this proposal? – Select any that apply [middle outlined block]
- c. Where will the proposal go after the custom route? – We recommend selecting Proposal should come back to this step (so the edits can be reviewed) [bottom outlined block]

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.

- 5. Deadline/Reminders are not required, but, if you want to enter reminders for this section, we recommend the below values.

**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).

6. Enter your comment for the Custom Route and select Request Custom Route. The Office of the University Registrar will then be notified that a Custom Route has been requested.

Please comment on this custom route

This field is required.

*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

7. After the custom route is approved by the Office of the University Registrar, the proposal will reappear under your **My Tasks** tab for your approval. Click on the proposal and select Decisions > Approve > Make My Decision. This completes the **Custom Route** process.

### Your Decision

What would you like to do with this proposal?

Approve       Hold  
 Reject       Suspend  
 Cancel

Please comment on your decision below.

Make My Decision

Discussion

Workflow Status

Signatures

Files

Decisions

## Returning a Proposal to the Previous Step

1. Go to the Decisions tab and select Reject > Make My Decision. This will reject the current step of the workflow and send the proposal back to the previous step.

### Your Decision

What would you like to do with this proposal?

Approve

Reject

Please comment on your decision below.

Must insert comment

**Make My Decision**

Discussion

Workflow Status

Signatures

Files

**Decisions**

## **Returning the Proposal to the Originator**

1. If the proposal needs to be rejected past the previous step, including to the originator, please email the request to [curriculog@pitt.edu](mailto:curriculog@pitt.edu), and the Office of the University Registrar will assist you with your request.