

CURRICULOG: CREATING A CUSTOM ROUTE



**OFFICE OF THE REGISTRAR
USER INSTRUCTIONS**

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PROCESS

A Custom Route is an additional ad hoc step outside the steps in the current approval process. Custom routes require administrator approval. Each individual included in the custom route will be required to approve the proposal before it can move to the next designated step. Please keep the number of custom approvers to a minimum to simplify your custom route. Step by step instructions for creating a custom route are listed below. Contact curriculum@augusta.edu if additional information is needed.

CREATING A CUSTOM ROUTE

1. Once you have selected the proposal in your queue that you wish to custom route, navigate to the Decisions section in the Proposal Toolbox by selecting the blue check mark icon.



2. Once the Your Decision dialogue box opens, select the radial button beside “Custom Route”. Select “Make My Decision”.

Your Decision

What would you like to do with this proposal?

Approve Hold
 Reject Suspend
 Cancel
 Custom Route

Please comment on your decision below.

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3. The custom routing workflow opens allowing you to choose the participant you would like to custom route the proposal to.

My Pending Custom Route

Custom Route (requested by Lacey White)

Step Name:

Custom Route

Participants



Rules



Decisions



Deadlines/Reminders



4. Select the green arrow to the right of “Participants” and select “Add Participant”.

Participants



Add Participant

5. You may utilize the blue arrow to expand the hierarchy items to view roles and utilize the + symbol to expand the users below each role.

Who is involved on this step?

Role Types

Hierarchy

Augusta University

Institutional Effectiveness

Registrar's Office

Division of Enrollment and Student Affairs

Add Role(s)

Cancel

6. Click on the user to select them. Their name will now be highlighted in blue. Select “Add Role(s)”. You may select multiple roles or individuals within the workflow.

Registrar

Heather Metress

Add Role(s)

Cancel

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7. Select the green arrow to the right of “Rules”. Within this box, you may determine whether the users involved in this custom route step will have the ability to edit the proposal and/or make comments. You may also determine whether this step requires a signature from the user. The last option is a drop-down menu allowing you to determine who may view comments made during this step. Augusta University recommends that you allow the user to make edits and comments but we do not recommend a signature be required. This would require the user to obtain a special PIN number from the Curriculum Systems Manager.

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) ▼

8. Select the green arrow to the right of “Decisions”. Within this box, you may determine the actions required to approve or reject a proposal and advance it to the next step of the proposal. You have the ability to determine whether this step requires 100% approval to advance or if a “Vote” is necessary and enter a percent for approval. You may determine if decision flags are to be used on the proposal. If selected, the options will be available to the user on the step in addition to the “Approve” or “Reject” options under decisions. The decision flags are outlined in the table below.

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.

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Who should be notified when the step is completed?

If Approved:

If Rejected:

Add Participant

Add Participant

9. You may also determine where the proposal will be routed after this custom route. Once the individual(s) on the custom route step make a decision, it may return to your step or it may advance to the next step. You may select users to be notified when the step is completed and you may add different users for approved and rejected steps. Again, you may select to assign role types rather than individuals that may change on different proposals. Once you have made all changes, select “Update Decisions”. Note: A user may not create another custom route from a custom route step.

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

10. Editing the Deadlines/Reminders option allows you to set a number of days to be allowed for a step and determine if reminders are to be sent to the users involved on this step. You may choose to automatically reject or approve the step if the deadline passes without action. You may also add users to be notified if the deadline passes without action, you may select role type, role, or individual user. Role types are recommended as a best practice. Additionally, a comment will need to be entered before selecting “Request Custom Route”.

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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).

Please comment on this custom route

[Preview Custom Route](#)

[Request Custom Route](#) [Cancel 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.

11. Once a custom route is requested, it may be canceled by navigating to the custom route icon and selecting “Cancel Custom Route”.

● Custom Route (requested by Lacey White)

Step Name:

Participants ▼

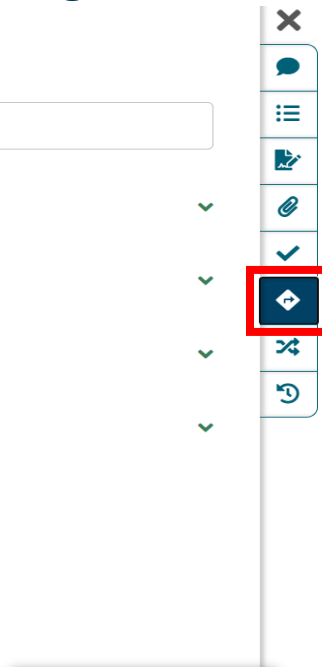
Rules ▼

Decisions ▼

Deadlines/Reminders ▼

[Preview Custom Route](#)

[Cancel Custom Route](#)



12. When the administrator makes a decision on the custom route, you will then be able to make your decision on the proposal. Once your decision is made, the proposal will then be advanced to the custom route (if approve)

CONTACT

If you have any additional questions, please contact our office at curriculog@augusta.edu.