1. If you find during a review of a proposal that it should be re-routed to a committee or another approval step for review, you can custom route the proposal to that “participant”. Open the proposal in “view” to start the re-routing process.

2. With the proposal open in view, you will want to click on the “Decision” icon (circle with check mark) in your “proposal toolbox” on the Right side pane. To request the “Custom Route”.
3. This should open your decision area. One of your options should be “Custom Route”. Select Custom Route and make your decision to set up the routing process you require.

4. The “Proposal Toolbox” area will now populate the custom route process. First, name the custom route process so that the originator knows what step of review you are creating. Next, you will want to select the “participants”, this is the committee or individual you want to review this proposal.
7. By clicking “Add Participant” the system will pop up a participant list. You will want to filter through the Hierarchy area to identify the “participant” needed for this request.

8. If routing this to a committee, make sure you select the committee and not the chair, if you only select the committee chair they will be the only one who can review. If you click on one of the choices, it selects it. You can add multiple participants, or if you clicked multiple on accident, simply click on a highlighted name to remove it from as your choice.

9. Click “Add Role” once you have highlighted the appropriate reviewer.

10. Once you have chosen your participants, you will want to set up the rules. This will determine what type of edits/comments they can make and if a committee, whether or not they can add the proposal to an agenda. Please note: our example is not being sent to a committee, so the agenda option is grayed out.
11. The second to last step is to determine what happens once a “decision” has been made.
   a. You will want to have the proposal approved at 100% if one person is reviewing it.
   b. You can also decide what the approver can do (i.e. hold for more information, cancel request or suspend).
   c. You will want the proposal to come back to the step you are on once a decision has been made so that you can review what happened before you make your own decision (recommended). You can also choose to make your decision now and have the proposal move on to the step after yours once they review the proposal.

12. You can also set a deadline, how quickly you want it returned back to you. We typically don’t set this up unless we have a short turn around time. You simply add how many days they have to review, if you want to limit the turn around time.

13. Finally, you will add a comment about why you are re-routing the request.

14. Once complete, click “Request Custom Route” and your request will be sent the System Administrator for review and approval.
15. Once the System Administrator has approved the request, you will now see the new custom route built into the workflow under the “status” icon.