How to Request and Configure a Custom Route

- How do I send a proposal to a participant who isn’t part of the workflow?

At a glance

1. Initiate the Custom Route.
2. Comment and configure the Custom Route settings.
3. Submit Custom Route request and await Administrator approval.

In more depth

In Curriculog, the Custom Route is the mechanism by which a proposal is sent to a participant outside the workflow of any proposal. A Custom Route might be used to return a proposal back to the originator or Department Coordinator in lieu of rejecting it, or perhaps to send a proposal to an affected school or department as a notification or to request an approval. It can also be used to send a proposal to any participant who has not yet seen the proposal and who would like to add it to his or her watchlist.

1. **Initiate the Custom Route.** Select the Decisions icon in the top right proposal toolbox, just as you would to approve or reject a proposal. Select Custom Route then click Make My Decision. (The system will not allow you to comment until you’ve done so.)
2. **Comment and configure the settings.** Once you’ve clicked Make My Decision, enter a comment in the blank field. Describe your reasoning or objective for rerouting the proposal.

Then, configure the settings for the Custom Route. Make your selections after expanding each section by clicking on the arrow icons: Participants, Rules, Decisions, and Deadlines/Reminders. For a full diagram of the most commonly used settings, see final page of this document.

- **Participants.** Find and select the person who should see the proposal. You may select any individual participant by clicking their name (recommended), or you might choose to select a role type that will identify a participant based on the proposal details.

- **Rules.** Choose whether the recipient should be able to edit the proposal and/or comment on the proposal. If it is merely for their review, select nothing. *Do not* select “Is signature required” as this function is not used. Choose who may see the comments during the Custom Route. “Every user involved in the current step PLUS originator” is recommended, but this selection will vary depending on the purpose of the Custom Route. Note that only USC Shibboleth authenticated users can log in to USC Curriculog – no comments or details of a proposal are ever visible to the public.

- **Decisions.** Choose what decisions can be submitted for the Custom Route. It’s recommended to always select “Approve / Reject 100% for approval” and “Proposal should come back to this step.” Note that if “Proposal should advance to the next step” is selected an official approval also must be submitted in your step to allow the proposal to proceed once the Custom Route is complete.

- **Deadlines/Reminders.** You may choose to have a reminder notification sent at customizable intervals, but this is most likely not necessary.

Custom Route settings, including a few not mentioned above, may be configured in various ways depending on your needs. Contact an Administrator for more information.
3. **Submit Custom Route request.** Once the settings have been configured, click Request Custom Route. An Administrator must review and approve these requests before they proceed to the selected participant. You may wish to inform an Administrator of your request to expedite this process.