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How to request a custom route on a proposal.

There are two stipulations for requesting a custom route. First, the proposal must be on a step requiring your approval (found in the My Tasks tab). Second, the Approval Process must have Custom Routing available on the step that the proposal is currently on.

After logging in, find the Proposal you wish to create a custom route for. It can be found in the My Tasks section of the Proposals Module. Hover over the item and click on the Edit Proposals Icon.
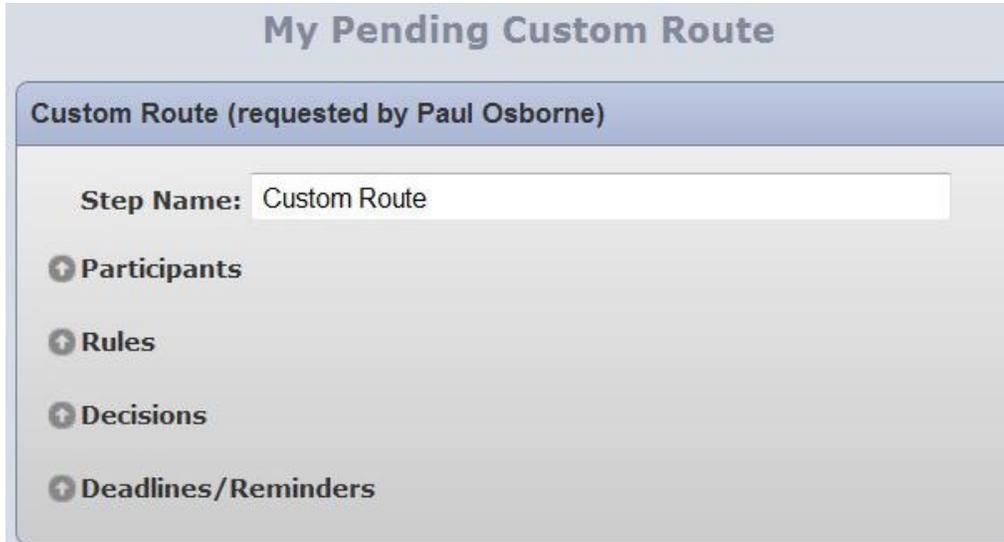
Custom Routes are sent through the Decisions screen of the Proposal Toolbox.
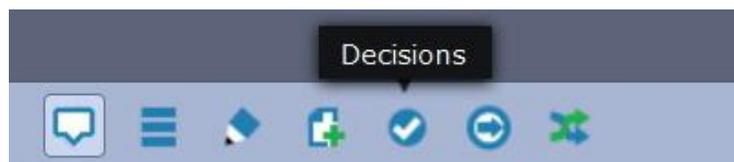
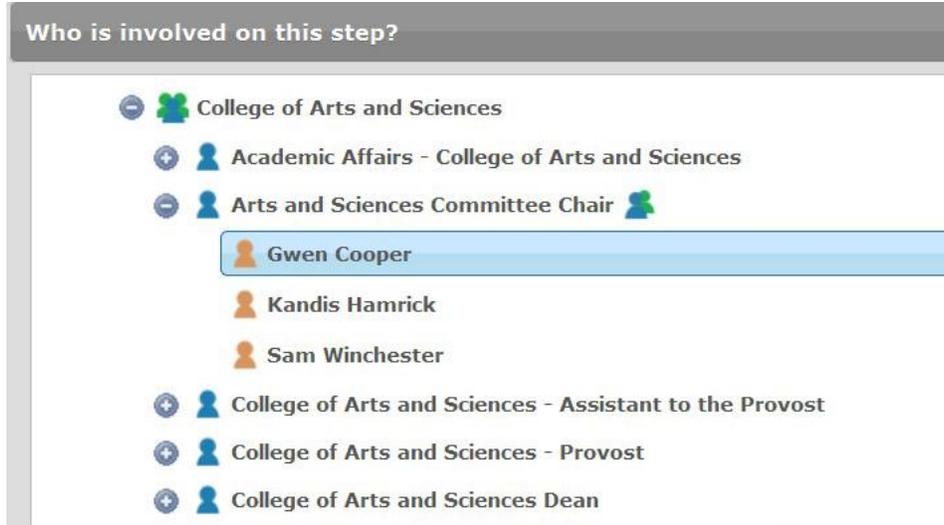Click on the Custom Route radio button, provide any comments and then choose "Make My Decision"

You will be redirected to the Custom Route tab where you will create a customized Step. First you will want to give the Route a name and then you will use the four show/hide options to customize.

You can add any number of Participants for this step. Click the Add Participant icon and then use the options available to add Roles.

Next you are able to set the rules which include who is able to view the step, if a signature is required to move on, and whether or not the Participants can make edits or just make comments.

In the Decisions section you can determine whether you need a unanimous decision, or a percent for the step to move on. All Participants will be required to make a decision either way before the Proposal moves on. You can also allow participants to Hold/Suspend/Cancel the Proposal with a series of checkboxes. Next you can determine whether you want the Proposal to continue on its path or revert to

the previous step once it has been completed and you are able to notify users when the Step is completed.

Lastly, you are able to set up a Deadline or Reminder. Deadlines can be used to automatically approve or reject the Step after a certain period of time and Reminders will send e-mails to the Users that have been asked to make a decision.

Once you have finished setting up the options for the custom Step, you must add a Comment before you can Request the Custom Route. This button will notify an Administrator that you are requesting a Custom Route, and then he/she can decide whether this request is acceptable or not.

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.

Request Custom Route   **Cancel Custom Route**