

## MC Curriculum: Custom Route Directions

Custom routes allow you to send proposals to a role that is not currently in the workflow. For example, if you are creating a combined program, and need the Dean's office of another school or college to approve the proposal before it moves on to the next step, you can custom route the proposal to that office. We anticipate that this will be primarily used for the combined program form, but may be used for any proposal type by anyone in the pre-set workflow.

To Create a Custom Route:

1. Open your proposal in [MC Curriculum](#) and click on the “**Decisions**” tab in the right-side menu (it looks like a check mark). That will take you to the following screen:

**Your Decision**

What would you like to do with this proposal?

☐ Approve ☐ Hold

☐ Reject ☐ Suspend

☐ Cancel

☒ Custom Route

Please comment on your decision below.

**Make My Decision**

**Current Step Activity**

**Decisions Tab**

**Custom Route Tab**

2. Select the “**Custom Route**” option, then click “**Make My Decision**”.
  - a. This will automatically take you to the custom route section of Curriculum, shown below. Click on the down arrow to expand the different sections. The comment box will gray-out when you select “custom route”, and will be available again when you make your decision on the proposal.

My Pending Custom Route

Custom Route (requested by Courtney Ignarri)

Step Name:

Custom Route

Participants

Add Participant

Rules

Decisions

Deadlines/Reminders

Discussion

Workflow Status

Signatures

Files

Decisions

Custom Route

Crosslistings

3. To select who you want to custom route the proposal to expand the “**Participants**” section by clicking the down arrow, then click on “**Add Participant**”.
4. You will have two options to select from: “**Role Types**” or “**Hierarchy**”
  - a. “**Role Types**” allows you to select by role (e.g., Curriculum Committee, Online Education, or BRC).
  - b. “**Hierarchy**” allows you to select an individual, click on “Hierarchy”, “Binghamton University”, then expand the role to see users assigned to each role. You can select one or multiple people.

### Who is involved on this step?

▼ **Role Types**











▼ **Hierarchy**

Add Role(s)

Cancel

5. To select a role or individuals, expand the section using the arrows. Within the “Hierarchy” you can expand further to find individuals by their area of affiliation with the process. Simply click on the role or individual to highlight that area.
- a. If you are not sure where to find someone, contact [undergraded@binghamton.edu](mailto:undergraded@binghamton.edu).

### Who is involved on this step?

- ▼ Role Types
- ^ Hierarchy
  - ^  Binghamton University
    - ▼  BRC  
*BRC*
    - ▼  Course Building Space Management
    - ▼  FIRC  
*FIRC*
    - ▼  Faculty Senate  
*Faculty Senate*
    - ▼  GD Admissions
    - ^  ISSS
      - Brad Gordon
      - Patricia Bello
      - Rebecca Greenstrom
    - ▼  OIR
    - ▼  Online Education
    - ▼  PRC  
*PRC*

Add Role(s)Cancel

6. Once you have made your selections, click “**Add Role(s)**”.


Example for Combined Degree Proposals: To select someone in another deans office, scroll down to the college/schools, and click on the down arrow to expand and show the roles within each college/school. For example, below I selected Harpur:


## Who is involved on this step?


### ^ Harpur College of Arts and Sciences


✓  Harpur Asst. Dean for Finance

 Harpur Catalog Builder

✓  Harpur College Council  
*Harpur College Council*

✓  Harpur College Educational Policy and Priorities Committee  
*Harpur College Educational Policy and Priorities Committee*

✓  Harpur College of Arts and Sciences Curriculum Committee  
*Harpur College of Arts and Sciences Curriculum Committee*

^  Harpur Dean Approver

Cody Kreps

Shannon Monell

✓  Art History Department

**You can select either the role of Dean Approver to custom route it to everyone with that role, or select a particular member in the Dean Approver role**

Add Role(s)

Cancel

7. After selecting who you are routing the proposal to, you will then want to select “**Rules**”, which allows you to limit how much access the person you are custom routing to has, as well as limit who can view the proposal at this step.

### My Pending Custom Route

● Custom Route (requested by Courtney Ignarri)

#### Step Name:

Custom Route

#### Participants

#### Rules

#### What work is allowed on each Proposal?

- ☐ Edit Proposal
- ☐ Make Comments

#### Is a signature required?

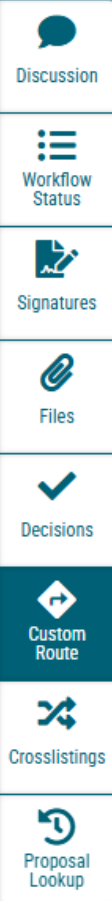
- ☐ Yes

#### 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)



- a. Please check **both** “Edit Proposal” and “Make Comments”. If these are left blank, whoever is selected in your Custom Route will only be able to view the proposal but will not be able to approve it.
  - b. You should not need to modify any of the other options at this step. If you have questions, please reach out to [undergraded@binghamton.edu](mailto:undergraded@binghamton.edu).
8. Next, you will decide what decisions the person you are custom routing the proposal can make, as well as who should be notified when their step is complete. Expand the “**Decisions**” portion of the Custom Route.

## My Pending Custom Route

 Custom Route (requested by Courtney Ignarri)

### Step Name:

Custom Route

Participants

Rules

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.

### Who should be notified when the step is completed?

*If Approved:*

*If Rejected:*

[Add Participant](#)

[Add Participant](#)

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 Proposal Lookup

- a. **Type of Decision:** If you are routing this proposal to an individual, you can leave it at 100% participation and 100% approval. If you are routing it to a group of people—such as a Deans office which may have more than one participant—we recommend using the third option and setting participation to 10%.
- b. **Kind of Flags:** We recommend selecting Hold, Cancel and Suspend, unless the person will only be viewing the proposal. Those making decisions should have all three options.

c. Where the proposal should go after the custom route:

- i. **If you want to approve the proposal before it is sent to the other reviewer:** Select “proposal should advance to the next step” so the proposal continues to the next workflow step after the person it is routed to has made their decisions. The proposal **will not return to you for approval**.
- ii. **If you want to approve the proposal after it is reviewed by the other reviewer:** Select “proposal should come back to this step” so the proposal comes back to you after the person it is routed to has made their decision.

9. At the bottom is a space for your comments. We recommend you include why you are routing it and what actions the person you are routing it to needs to take.

Please comment on this 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.*

Preview Custom Route

Request Custom Route

Cancel Custom Route

10. Custom Routes do not go through automatically, but are approved by an administrator. To finish your Custom Route, you will click on “**Request Custom Route**”. Please email [undergraded@binghamton.edu](mailto:undergraded@binghamton.edu) to let us know you need your custom route approved.