
OUR Curriculum Development and
Academic Publications



**Curriculog Guide
Proposals**

CURRICULUM DEVELOPMENT AND ACADEMIC PUBLICATIONS

Curriculog Guide – Proposals

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CURRICULOG

Curriculog is a workflow, collaboration, and approval-tracking platform with the flexibility to respond to evolving institutional and accreditation requirements. Adopted in 2014, the online system will replace the paper versions of Coordinating Board Management (CBM) forms and other methods of proposing and approving changes to courses, programs, and catalog text.

Features

Curriculog creates the ability to:

- Communicate changes to university curriculum to the entire academic community
- Provide historical logging of comments and voting at each level of approval
- Help users understand impacts of change for other courses and programs that may depend on other courses (as prerequisites, Core, plan-required courses)
- Track the progress of proposals in real time
- Develop agendas and meet virtually (via voting and comment logging) or in-person to discuss proposals
 - Smartphone, iPad, and laptop users can also enter comments and cast votes, and make decisions
- Interface with other UH systems (PeopleSoft and Acalog (catalog) in order to reduce duplication of effort and opportunity for manual entry errors when inputting approved changes into the external systems

Training

Training information is located on the OUR – Curriculum Development and Academic Publications website:

<https://www.uh.edu/about/offices/enrollment-services/registrar/curricular-services/curriculum/>

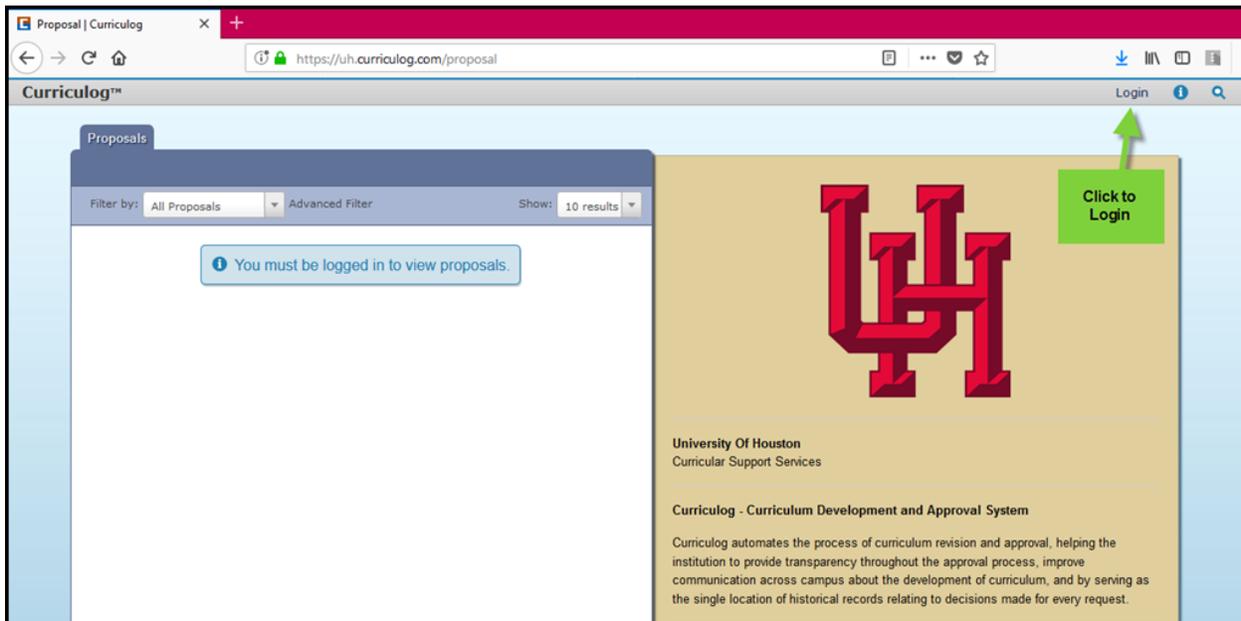
Accessing Curriculog

Credentials

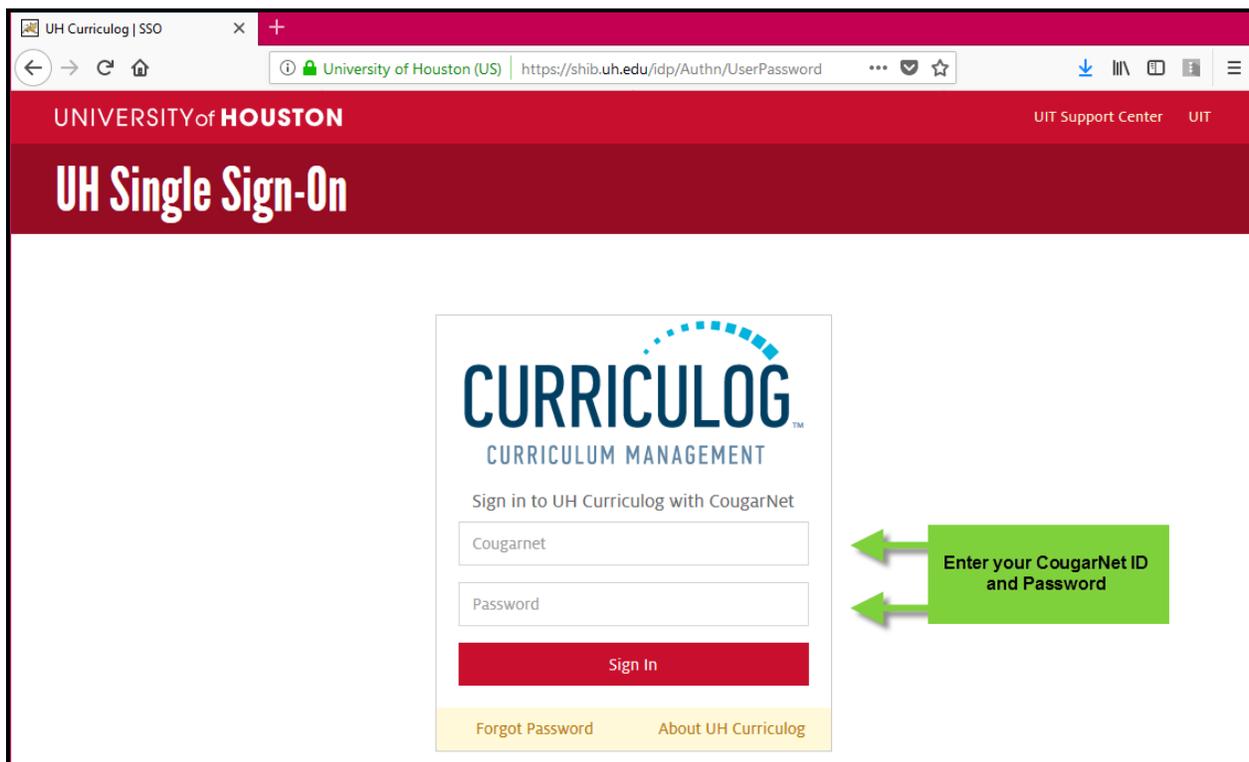
- Who has access?
 - All faculty and the staff that need to support the proposal process will have access to Curriculog
- Username and Password
 - Login requires Cougarnet Credentials
 - You will be redirected to a UH Single Sign-On (SSO) portal
 - Enter your Cougarnet credentials and click “Sign In”
 - If you have faculty and/or staff affiliation, you will be redirected back to the UH Curriculog website and ready to use the system
- Login Support
 - Incorrect Password/Forgot Password
 - If you entered incorrect Cougarnet credentials, you will receive a login error message prompting you to enter the correct login credentials. If you have forgotten your password, click on the “Forgot Password” button to be directed to University Information Technology (UIT) Cougarnet Password Wizard to reset your password

Login

1. Go to: <https://uh.curriculog.com/>
2. Click on “Login” on the top, right of the page

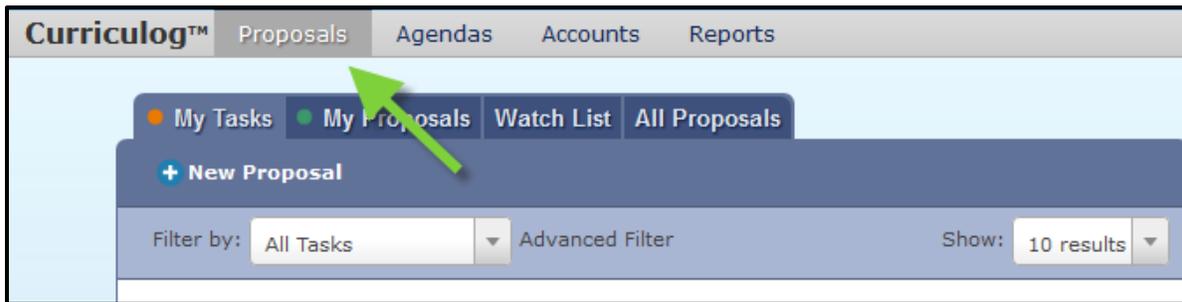


3. Enter your CougarNet ID and CougarNet password

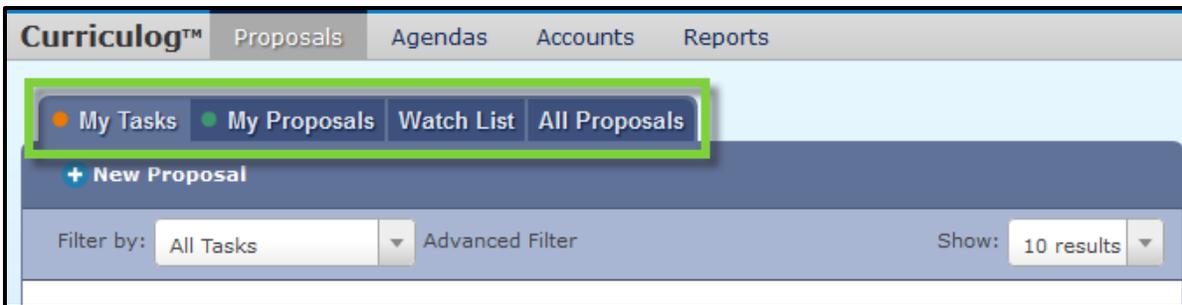


Proposals

Proposals are the forms that travel up the approval chain. Each proposal from has a specific approval process tied to it in a 1:1 relationship. Selecting the Proposals Module from the top navigational menu will populate the left pane with options relevant to managing proposals.



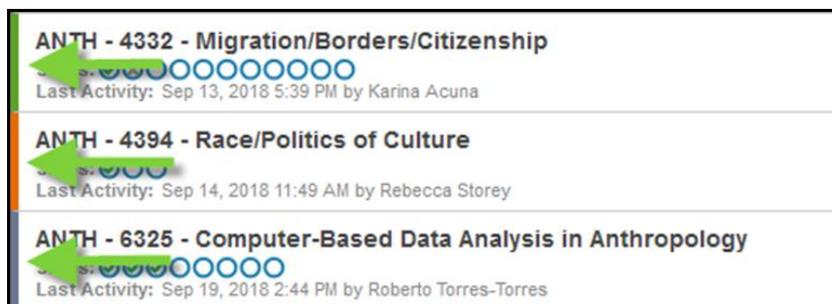
From the Proposals Module in the top navigation, you will now have access to the **My Tasks**, **My Proposals**, **Watch List**, and **All Proposal** tabs.



- **My Tasks** – lists all proposals assigned to you and awaiting action
- **My Proposals** – lists all proposals you have created, whether they have been launched or not
- **Watch Lists** – lists all proposals you have selected to watch. You may or may not have editing permissions or decision making abilities on an item you are watching, as you are able to watch any proposal in progress. See below on how to add items to your Watch List
- **All Proposals** – lists all of the active proposals in Curriculog

Below these tabs is **+ New Proposal**. Selecting **New Proposal** will open the workflow to create a new proposal. The **New Proposal** section is explained below.

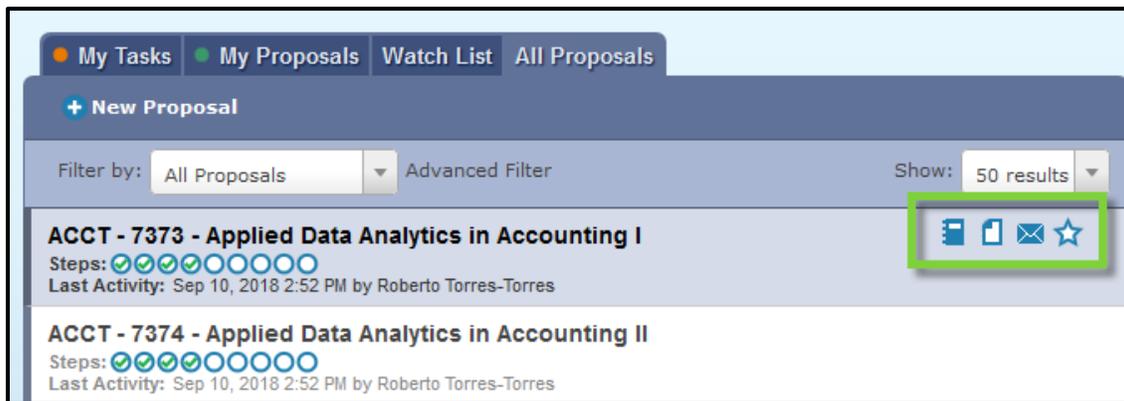
There are various icons and colors associated with the proposals. The thin colored bar that appears to the left of the proposal will change based on the relationship with the user.



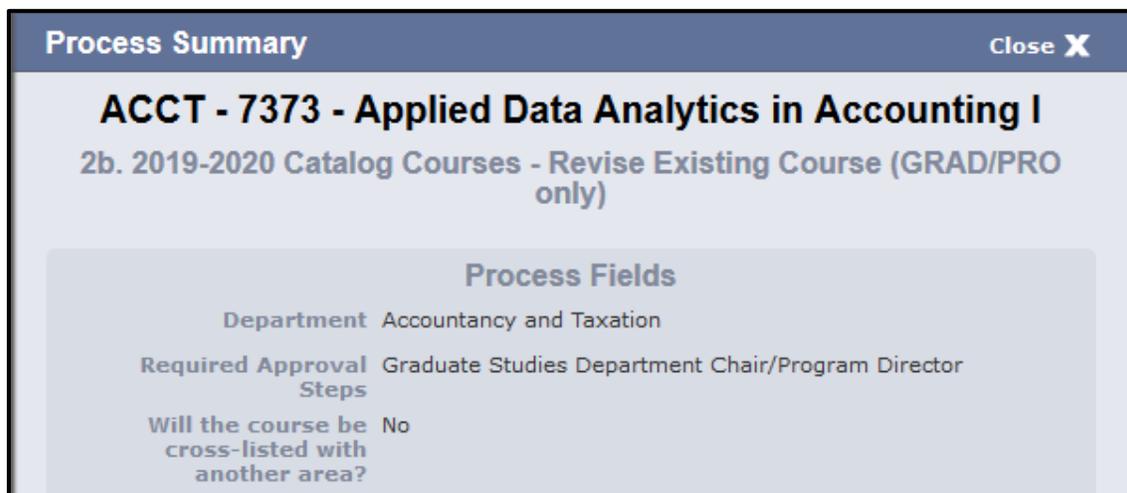
- **Blue** – no action currently required
- **Green** – a proposal created by you
- **Orange** – waiting on an action from you

Proposal Action Toolbox

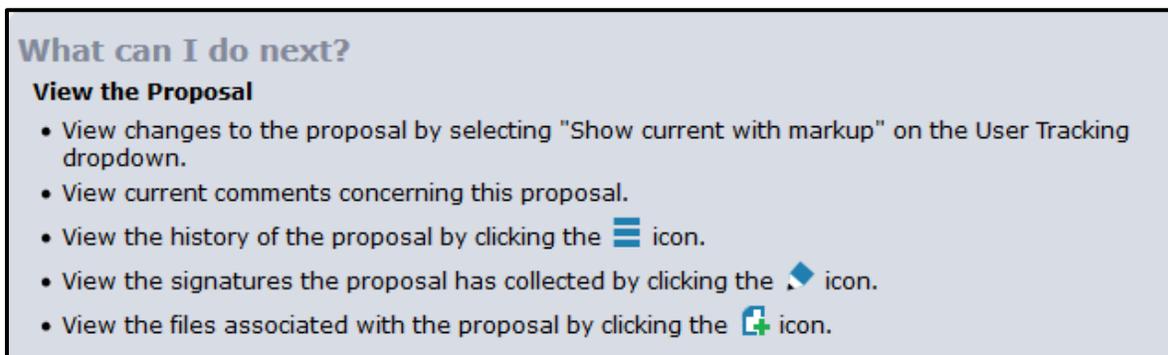
Each tab will provide a list of proposals that will display an Action Toolbox when hovered over.



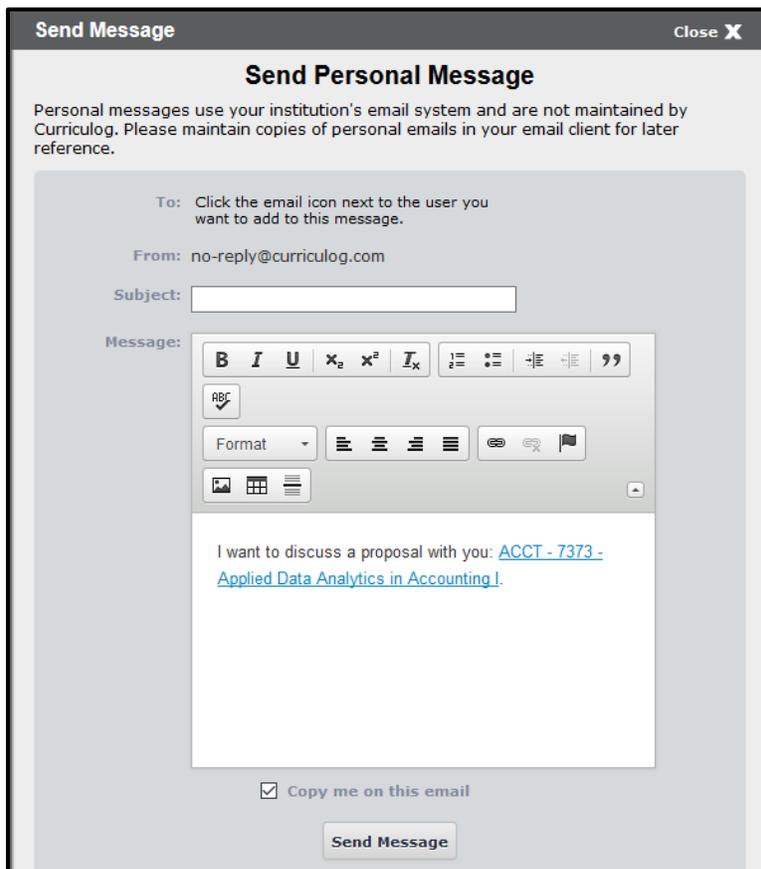
- **Urgent** – indicates a task is urgent. An item will be considered urgent once the urgency threshold has been met, which is set by the Administrator.
- **View Summary** – will create a fly-out on the right pane displaying information relevant to the proposal



- **View Proposal** – will take you to the form to view the proposal



- **Send Message about proposal** – Emails are not maintained within Curriculog



- **Watch Proposal**  – Allows you to keep track of a proposal in progress by listing the Watch List tab
- **Done Watching Proposal**  – Allows you to stop tracking the proposal
- **My Current Decision**  – This icon will change based on what decision you have made on the Proposal. You can click the help  icon for a key to what the different decision icons mean.
- **Delete a Proposal**  – Deleting a proposal will permanently remove it from Curriculog. Proposals cannot be deleted after they have been launched.
- **Edit Proposal**  – if this is your proposal or if you have an action to make on the proposal, this icon will appear. If clicked, you will be directed to the Proposal Toolbox, where you may make modifications and enter your decision on this proposal.

Create a NEW Proposal

[+ New Proposal](#)

Selecting [+ New Proposal](#) allows you to create a new proposal. Please note that before a new proposal can be created, an Approval Process must be created by an Administrator. A Sort by: drop-down menu is available for sorting the processes by Process Type or Process Title. Each process row will display the name of the approval process, the number of steps involved in the process and a blue checkmark. Each drop down menu will display ten rows with “Previous 10” and “Next 10” buttons available for navigating when there are multiple pages. Only current/active proposal form will be available to for selection.

Approval Processes | Curriculog X +

https://uh.curriculog.com/approval-processes

Curriculog™ Proposals Agendas Accounts Reports

All Processes Courses Programs Others

Sort by: Process Title

1a. Independent Study / Selected Topics / Special Problems / Thesis TOPIC Request (GRAD/PRO only)
Steps: 2 mandatory 6 total

1b. Independent Study / Selected Topics / Special Problems / Thesis TOPIC Request (UGRD Only)
Steps: 2 mandatory 6 total

2018-2019 Graduate Academic Catalog Editing
Steps: 5 mandatory 9 total

2018-2019 Undergraduate Academic Catalog Editing
Steps: 3 mandatory 9 total

2a. 2019-2020 Catalog Courses - Create New Course (GRAD/PRO only)
Steps: 8 mandatory 12 total

2b. 2019-2020 Catalog Courses - Revise Existing Course (GRAD/PRO only)
Steps: 8 mandatory 12 total

2c. 2019-2020 Catalog Courses - Delete Existing Course (GRAD/PRO only)
Steps: 9 mandatory 12 total

7a. 2019-2020 Graduate Academic Catalog Editing
Steps: 5 mandatory 9 total

7b. 2019-2020 Undergraduate Academic Catalog Editing
Steps: 3 mandatory 7 total

7c. 2018-2019 Student Handbook Editing
Steps: 5 mandatory 5 total

Previous 10 Next 10

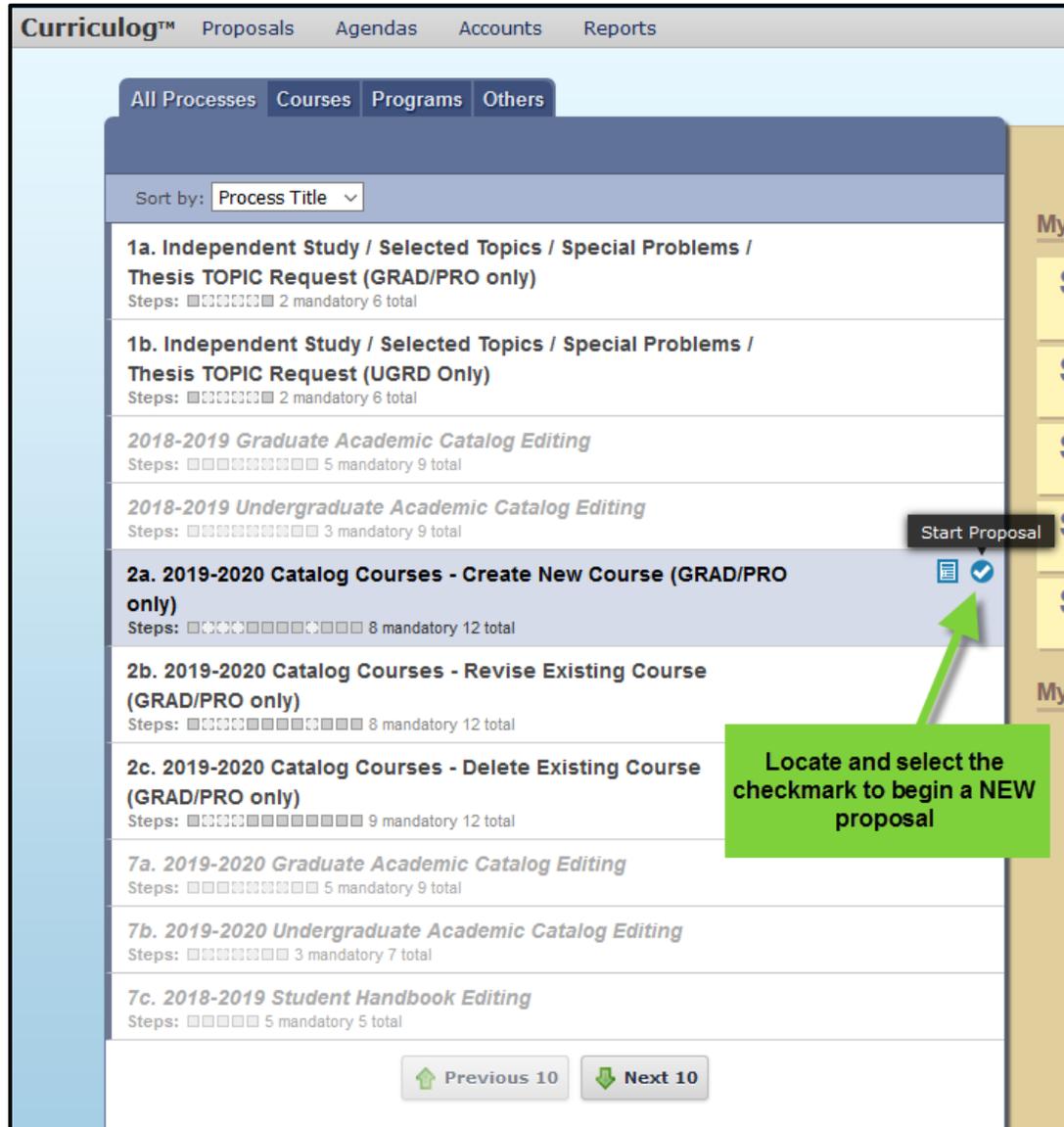
SUMMARY OF PROPOSAL CREATION STEPS

1. Find and select appropriate proposal for the change you need to submit
2. For changes to EXISTING catalog course information:
 - a. Import the existing catalog course information but **DO NOT MAKE CHANGES NOW**
 - b. Complete any other required fields
 - c. LAUNCH proposal
 - d. You will be the first step in the proposal approval process. Once launched, make the necessary changes to the existing information, so that the changes can be easily seen and tracked.
 - e. Enter any additional comments (if necessary)
 - f. Make your decision to send the proposal to the next step in the approval process
3. For NEW content:
 - a. Complete all necessary and required fields
 - b. LAUNCH proposal
 - c. You will be the first step in the proposal approval process. Once launched, you can make any necessary changes to the existing information
 - d. Enter any additional comments (if necessary)
 - e. Make your decision to send the proposal to the next step in the approval process

Clicking on the Preview Form icon  will display the Process Summary in a new window. This will display the proposal type form details.

Start a Proposal

Locate the approval process you would like to use and select the blue checkmark to start the proposal.



The screenshot displays the Curriculog™ interface for managing proposals. The top navigation bar includes 'Proposals', 'Agendas', 'Accounts', and 'Reports'. Below this, there are tabs for 'All Processes', 'Courses', 'Programs', and 'Others'. A 'Sort by: Process Title' dropdown is present. The main content area lists various approval processes, each with a progress indicator (a row of squares) and a description of steps. The process '2a. 2019-2020 Catalog Courses - Create New Course (GRAD/PRO only)' is highlighted in blue, and a blue checkmark icon is visible next to it. A green callout box with an arrow points to the checkmark, containing the text 'Locate and select the checkmark to begin a NEW proposal'. A 'Start Proposal' button is also visible above the checkmark. At the bottom of the list, there are 'Previous 10' and 'Next 10' navigation buttons.

This will launch the Proposal Toolbox, allowing you to complete the appropriate fields to propose an item based on the approval process selected. The proposal form will vary greatly depending on the customization applied to the approval process by the Administrator.

General Field Type Instructions

- **Note:** the instructions below are as example to familiarize you with the function of Curriculog, not as specific instruction for the proposals, however, the workflow is consistent within other proposal forms. Instructions per form are included as Help text with each proposal form

- A course proposal will include Prefix, Code, Name, and Hierarchy Owner as the default fields while
- A program proposal will include Hierarchy Owner, Title, Prospective Curriculum, and Expected Outcomes.

1. Course Ownership/Implementation/Justification

(Administrative Use Only) Topic ID#

Please use this form to:

- **CREATE** a new topic for an existing Selected Topics course. If a generic/primary/parent Selected Topics course does not already exist (or is inactive), that step must be completed before you may use this form. Please contact your department chair or Dean's Office for guidance.
<or>
- **CREATE** a new topic for an existing Independent Study course. If a generic/primary/parent Independent Study course does not already exist (or is inactive), that step must be completed before you may use this form. Please contact your department chair or Dean's Office for guidance.
<or>
- **CREATE** a new topic for an existing Special Problems course. If a generic/primary/parent Special Problems course does not already exist (or is inactive), that step must be completed before you may use this form. Please contact your department chair or Dean's Office for guidance.
<or>
- **CREATE** a new topic for an existing Thesis course. If a generic/primary/parent Thesis course does not already exist (or is inactive), that step must be completed before you may use this form. Please contact your department chair or Dean's Office for guidance.

Turn on Help Text.

Please click on the icon of the "i" within a blue circle to 'Show Help Text'. It is located at the top-

Proposal Toolbox Status: **unlaunched**

Approval Steps

Originator Status: *Incomplete*

Participants: Karina Acuna

Step Details: Required for Approval: 100% required Work: edit, comment

GRAD/PRO Department Curriculum Committee Status: *Not Applicable*

Step condition must be met: 'Required Approval Steps' is equal to 'Graduate Studies Department Committee Review'

Participants

Step Details: Required for Approval: 100% required Work: edit, comment Agenda: Yes

* Agenda Administrator

GRAD/PRO Department Chair/Program Director Status: *Not Applicable*

Step condition must be met: 'Required Approval Steps' is equal to 'Graduate Studies Department Chair/Program Director'

Participants

Step Details: Required for Approval: 100% required Work: edit, comment Agenda: Yes

* Agenda Administrator

- **Required Fields** – Fields denoted with an asterisk, such as the Hierarchy or Program Type, are required in order to launch a Proposal.
- **Smartfields** – Items listed with a blue plus symbol and “Add Item” are Smartfields. When you select a Smartfield, Curriculog will launch a dialog box allowing you to select an option. When you select an item(s), it will be highlighted blue and you will click “Done”. The item(s) selected will now be visible within the proposal form.
- **Text Fields** – Text fields simply require you to insert text. When you click outside of the field, the text will save automatically.

2a. Parent Course Prefix/Number/Titles

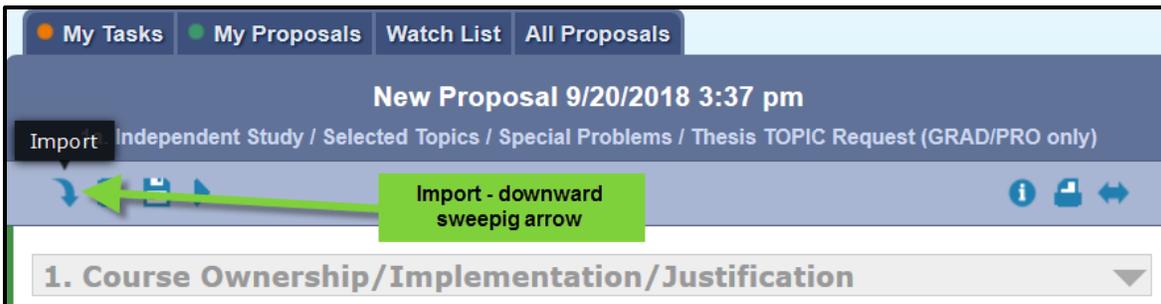
Course Prefix (Ex: ACCT)*

Course Number*

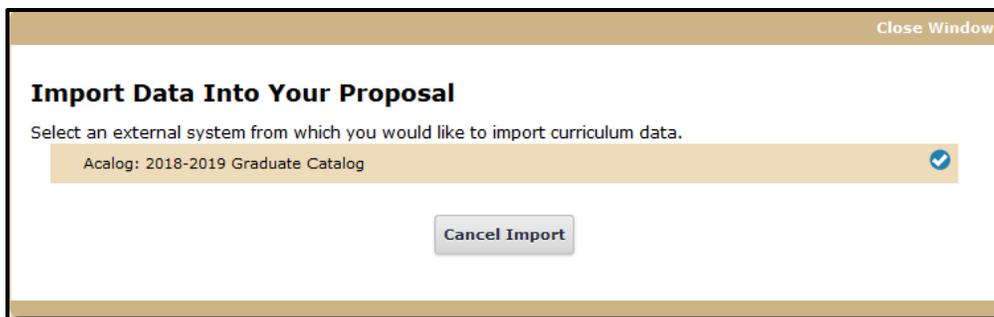
Text Field examples

Import Data into Proposal

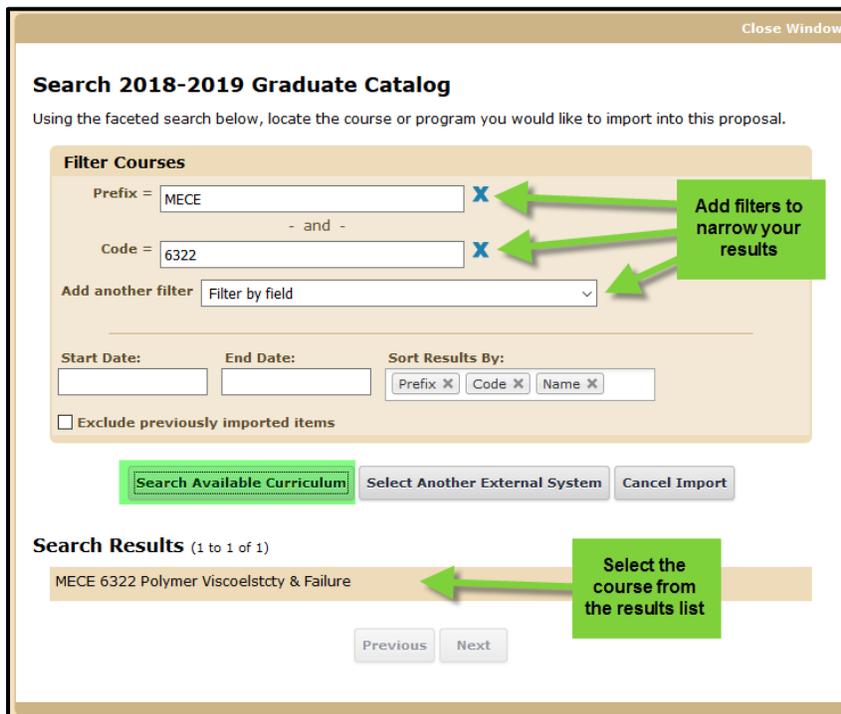
In addition to building a new course from the ground up, you can also import course information from the current UH Academic Catalog. The import icon  is located at the tip left of the proposal form.



A new window will appear featuring the Integration Manager, which can be used to pull course information from an external system.



Select the external system (the appropriate catalog) you would like to import from, and you will be presented with a filter that can be used to locate course or program information.



Select the information you wish to import, and the Integration Manager will display the fields being imported.

Import Data Into Your Proposal

Confirm the fields that will be imported into your proposal (only fields that are mapped will be listed here). If you would like to prevent the imported data from overwriting an existing field in your proposal, click "Import Field" to uncheck that field.

Once you click Import, your data will be validated against the proposal. Any data that is incorrect will have a message telling you what is wrong with the data, and it will not be imported into the form to prevent errors.

Field Name	Data Preview	Import Field
» 2. Course Catalog Information: Instructional Area/Course Prefix	MECE	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Course Number	6322	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Long Course Title	Polymer Viscoelstcty & Failure	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Short Course Title (30 character limit) Do NOT use periods for abbreviations	Polymer Viscoelstcty & Failure	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Instruction Type	Lecture	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Credit Hours	3.0	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Lecture	3	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Lab	0	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Course Credit Level	Doctoral	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Grade Option	Letter Grade	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: CIP Code (Include all 10 digits, including periods and spaces. Must use this format: ##.####.## ##)	14.1801.00 06	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Prerequisite(s)	MECE 3369 and MATH 3363 and consent of instructor.	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Corequisite(s)	[no data]	<input type="checkbox"/>
» 2. Course Catalog Information: Course Description (75 word limitation)	A combined materials science and solid mechanics treatment of time-temperature-deformation and failure behavior of polymers and polymeric composites at both the molecular and continuum levels. Various...	<input checked="" type="checkbox"/>
» 2. Course Catalog Information: Course Notes	[no data]	<input type="checkbox"/>
» Administrative Use Only: Original Course Prefix	MECE	<input checked="" type="checkbox"/>
» Administrative Use Only: Original Course Code	6322	<input checked="" type="checkbox"/>
» Administrative Use Only: Original Course Title	Polymer Viscoelstcty & Failure	<input checked="" type="checkbox"/>
» Administrative Use Only: PeopleSoft Course ID	031596	<input checked="" type="checkbox"/>

All available fields will be preselected. Click on "Import This Item" to accept data into the proposal.

Choosing "Import this Item" will import the program information into your proposal.

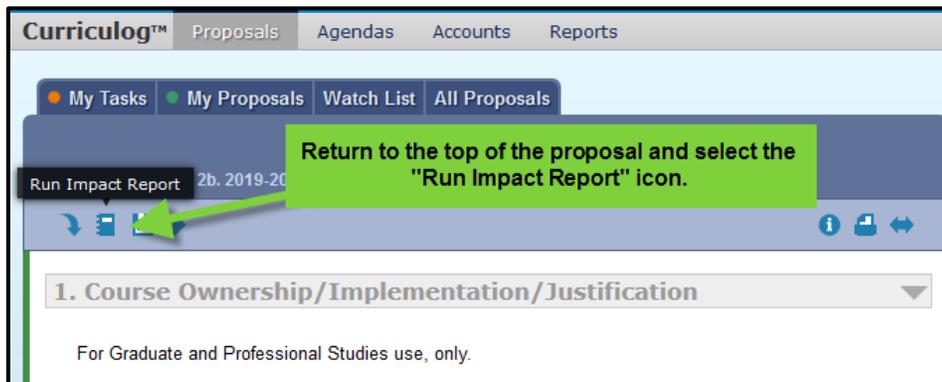
- Changes to existing courses will require an Impact Report, which is information about programs that currently use the course and other courses that use the course as a prerequisite. Curriculog can assist with locating this type of information, although it may not be exhaustive.
 - Instructions are provided within the proposal to help you compile the Curriculog Impact Report.

3c. Impact Report

To compile the Impact Report

1. scroll to the top of this proposal form.
 2. locate and select the "Run Impact Report" icon (looks like a notebook) in the top-left area of this proposal.
 3. A pop-up window will appear requesting that you select the appropriate catalogs to derive the connections to the course of this proposal. It is recommended that you select both the Graduate and Undergraduate catalogs, if available. Once selection made, please click "Generate Report."
 4. The report will automatically run based on the course prefix and number you entered above.
- When the information appears, please select all text, copy, and then paste into the Impact Report field below.

Impact Report*



Curriculog™ Proposals Agendas Accounts Reports

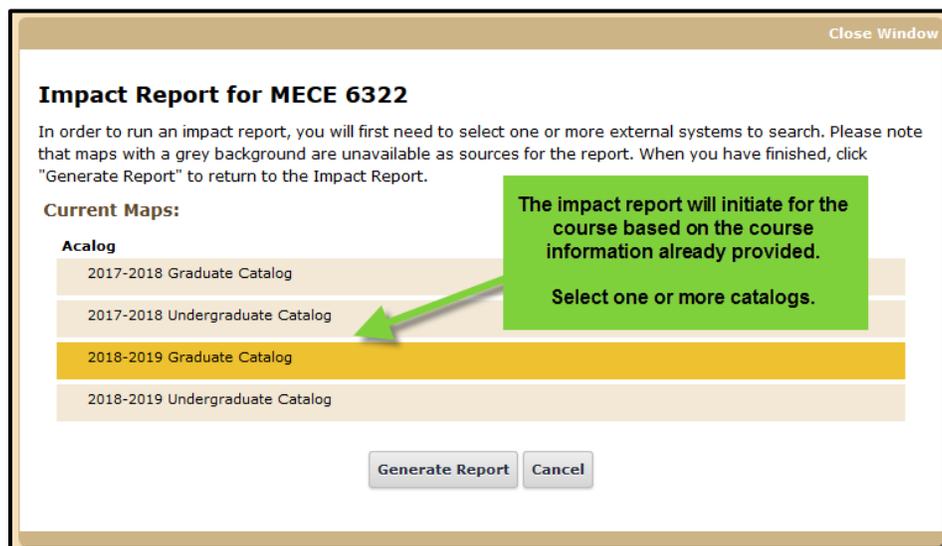
My Tasks My Proposals Watch List All Proposals

Run Impact Report 2b. 2019-20

Return to the top of the proposal and select the "Run Impact Report" icon.

1. Course Ownership/Implementation/Justification

For Graduate and Professional Studies use, only.



Close Window

Impact Report for MECE 6322

In order to run an impact report, you will first need to select one or more external systems to search. Please note that maps with a grey background are unavailable as sources for the report. When you have finished, click "Generate Report" to return to the Impact Report.

Current Maps:

Acalog

- 2017-2018 Graduate Catalog
- 2017-2018 Undergraduate Catalog
- 2018-2019 Graduate Catalog
- 2018-2019 Undergraduate Catalog

The impact report will initiate for the course based on the course information already provided. Select one or more catalogs.

Generate Report Cancel

- When the report information appears, <copy> and <paste> the information into the impact report field.



3c. Impact Report

To compile the Impact Report

1. scroll to the top of this proposal form.
2. locate and select the "Run Impact Report" icon (looks like a notebook) in the top-left area of this proposal.
3. A pop-up window will appear requesting that you select the appropriate catalogs to derive the connections to the course of this proposal. It is recommended that you select both the Graduate and Undergraduate catalogs, if available. Once selection made, please click "Generate Report."
4. The report will automatically run based on the course prefix and number you entered above. When the information appears, please select all text, copy, and then paste into the Impact Report field below.

Impact Report*

Pasted information from report

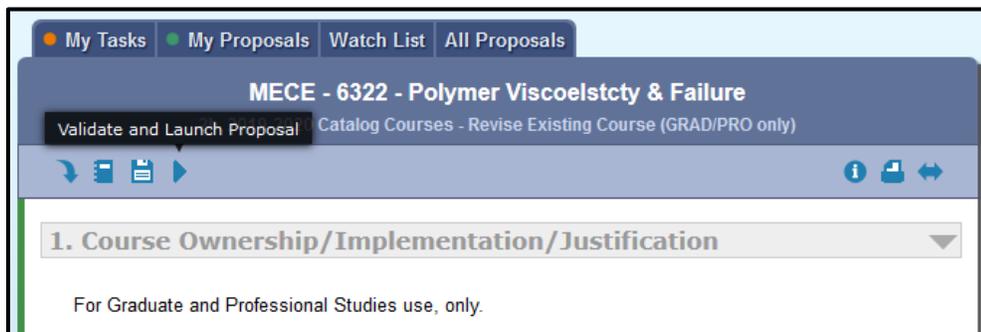
Impact Report for MECE 6322

Source: 2018-2019 Graduate Catalog

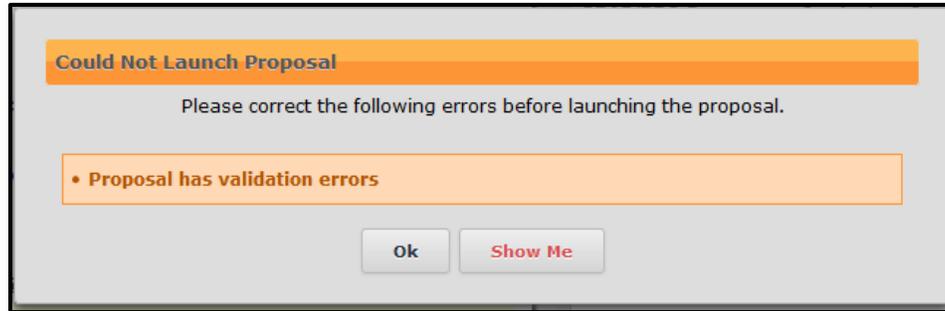
Permalink MECE 6322 - Polymer Viscoelstcty & Failure

Launching the Proposal

Validate and launch the proposal for committee workflow by returning to the top of the pane and clicking on the right-directional triangle.



- If any required field is missing information, a message will display and provide instructions for which one(s) and how to correct.



1a. Course Ownership and Approval Process

Department*
 Department is required.

Required Approval Steps* Graduate Studies Department Committee Review
 Graduate Studies Department Chair/Program Director
 Graduate Studies College Curriculum Committee
 Graduate Studies College Dean approval only
 Required Approval Steps is required

1b. Cross-Listing Courses

Cross-listing courses is defined as assigning the same class different catalog numbers for students in different academic units. This is NOT the same as combined courses, which are two or more class sections being taught in the same room at the same time.

Will the course be cross-listed with another area?* Yes No
 Will the course be cross-listed with another area? is required

Yellow highlighted sections indicate a required field is missing information

But WAIT! You're NOT done!

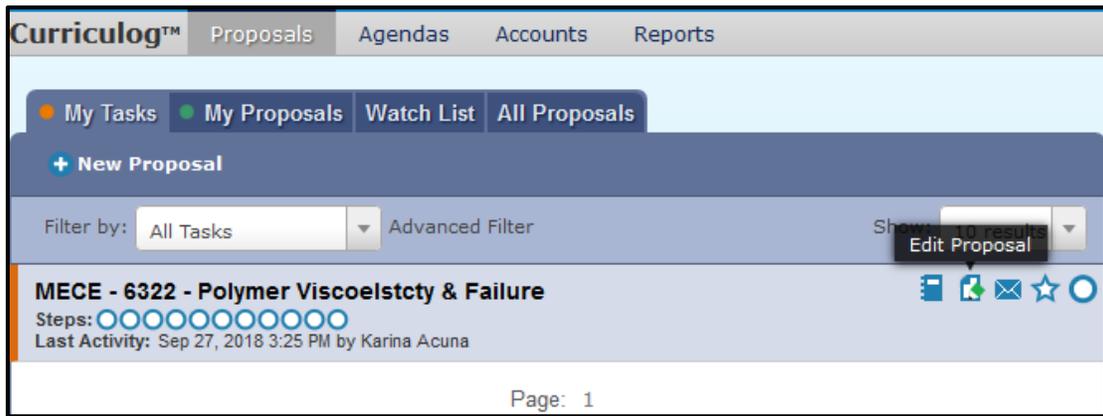
After you launch your proposal, you, as originator, are the first step in the approval process. This is your opportunity to:

- review the data
- **make any necessary changes** – if you are requesting to revise an existing course, this is the step where you make the changes to the course data, so that the following approval steps can see what currently exists and what is being requested to change
- add any missing or necessary attachments

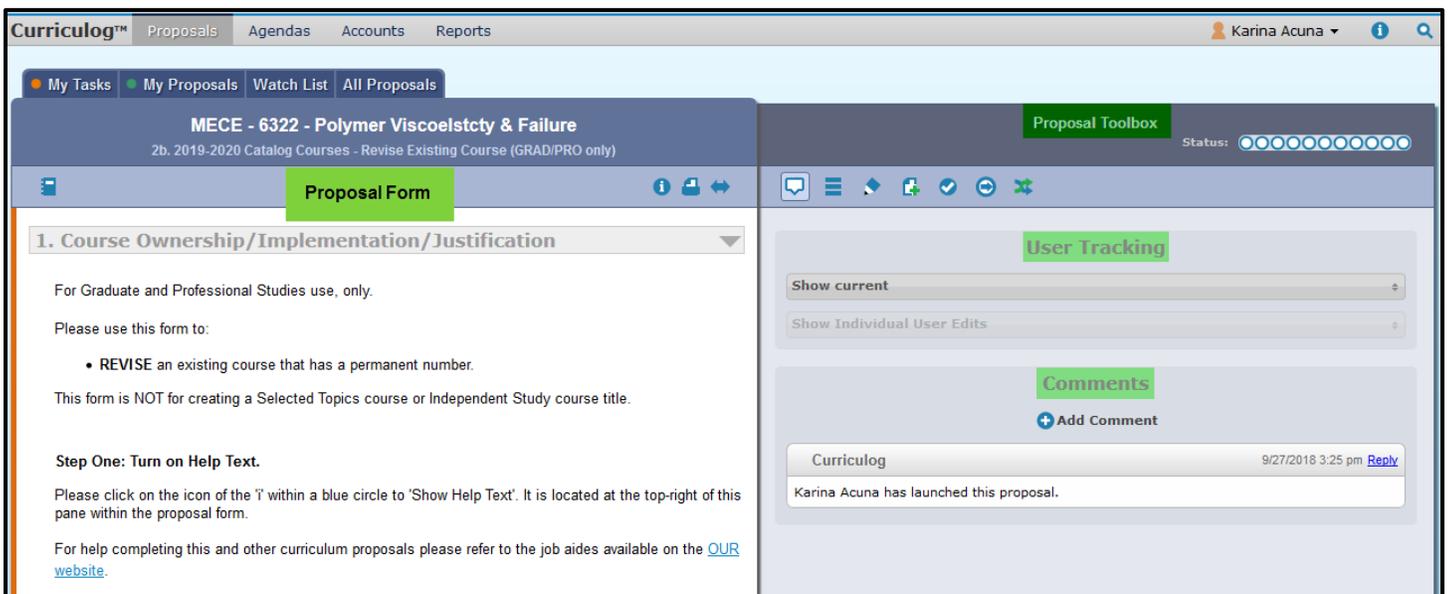
You will then navigate to the “Decisions” area on the right-hand pane and make your decision.

Make a Decision

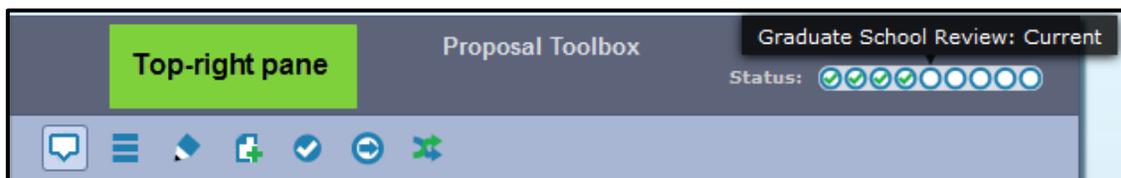
Proposals awaiting a decision from you will be listed in the **My Tasks** tab of the Proposals Module. This tab will display by default when logging into Curriculog.



To make a decision select the **Edit Proposal** icon . The proposal form will display allowing you to see the proposal form, User Tracking and Comments within the Proposal Toolbox.



You may view the status of each step within the proposal by hovering over the Status icons in the upper right of the Proposal Toolbox. Each circle indicates a step in the proposal. Hovering over a circle indicates the name of the step and the decision made on that step.



You may edit information in the proposal if you have been granted edit rights by the Administrator. Simply click in the field of the proposal form on the left that you would like to edit, make your modifications and select "Save". If you click in a field and the workflow does not display, you do not have rights to edit the proposal.

2a. Course Prefix/Number/Titles

Instructional Area/Course Prefix* ← Editable field

User tracking options allow you to view changes made by others within the proposal. There are three options available in the drop down menu. User tracking is available within fields determined by the Administrator within the approval process.

- Show current (default) displays the proposal in its current state
- Show original displays the proposal in its state at launch
- Show current with markup allows you to see the changes made, who made those changes as well as the date and time of the change

User Tracking

Show original

- Show original
- Show current
- Show current with markup

Additionally, each user is assigned a color within Curriculog to easily distinguish who made the edits displayed.

2a. Course Prefix/Number/Titles

Instructional Area/Course Prefix* MECE

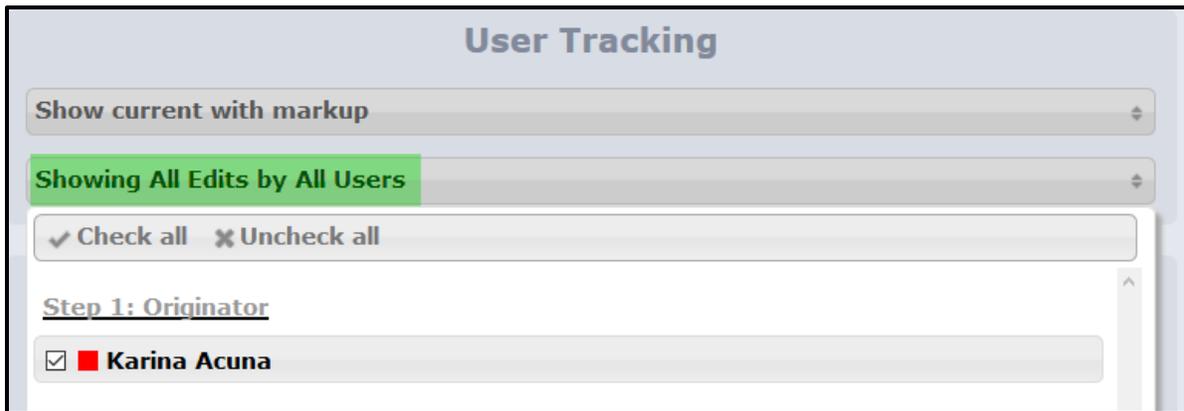
Course Number* 6322

Long Course Title* Polymer Viscoelstcty & Failure

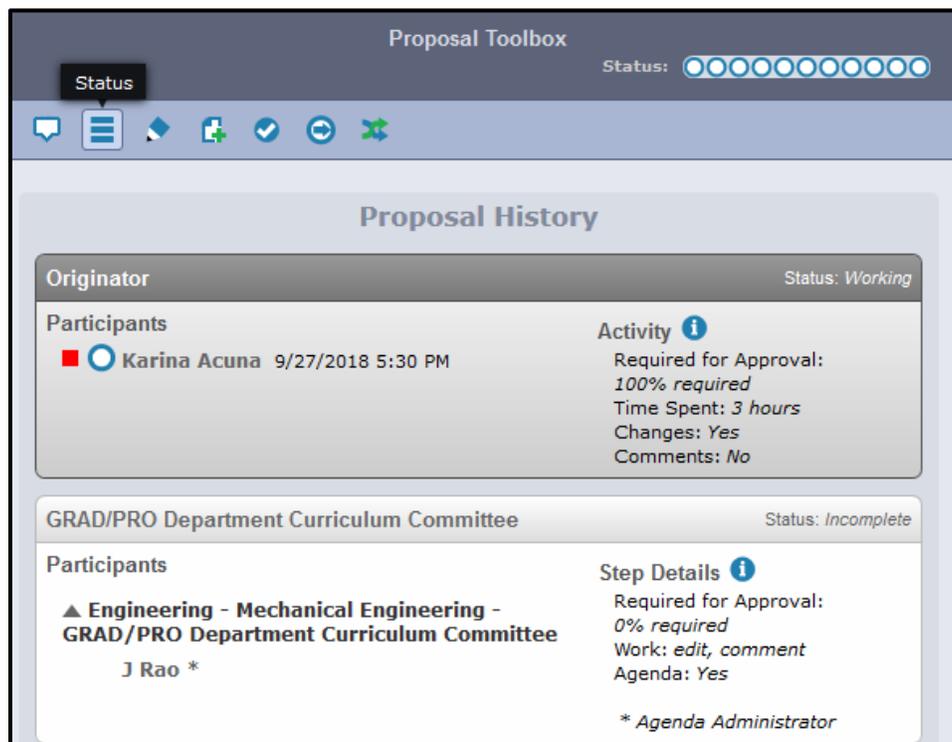
Short Course Title (30 character limit) Do NOT use periods for abbreviations* Polymer Viscoelstcty ~~& Failure~~

■ Karina Acuna
9/27/2018 5:30 PM

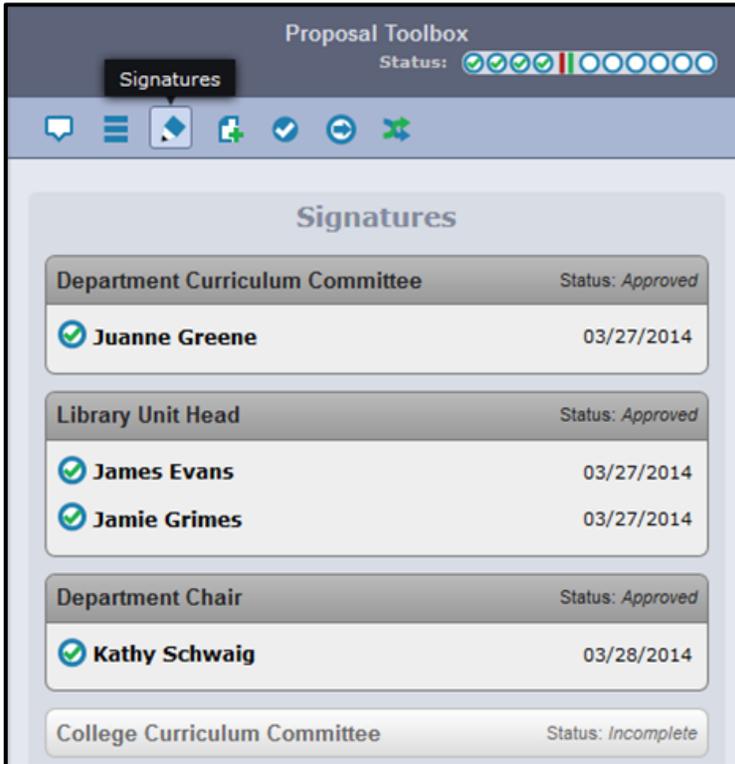
You may select to view changes made by a specific user or a number of users from the Showing All Edits by All Users drop down menu.



The Status icon  displays the proposal history within the proposal toolbox. The history indicates the status of each step, either approved, working, incomplete, awaiting Administrative action. Additionally, information regarding each step is displayed. The color of the individual (for user tracking purposes) and the decision the individual made are displayed under Participants. Activity is displayed on the right and includes the threshold required for approval, how much time the proposal spent on that step, if changes or comments were made, which options were available to the user and if a signature was entered.



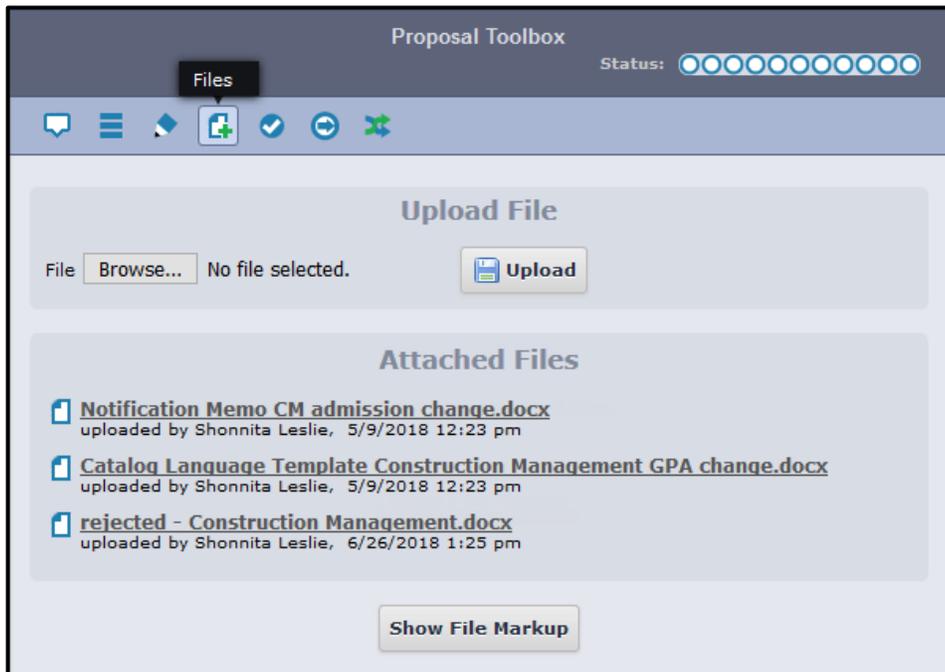
The Signature icon displays each step and the signatures entered on the step.

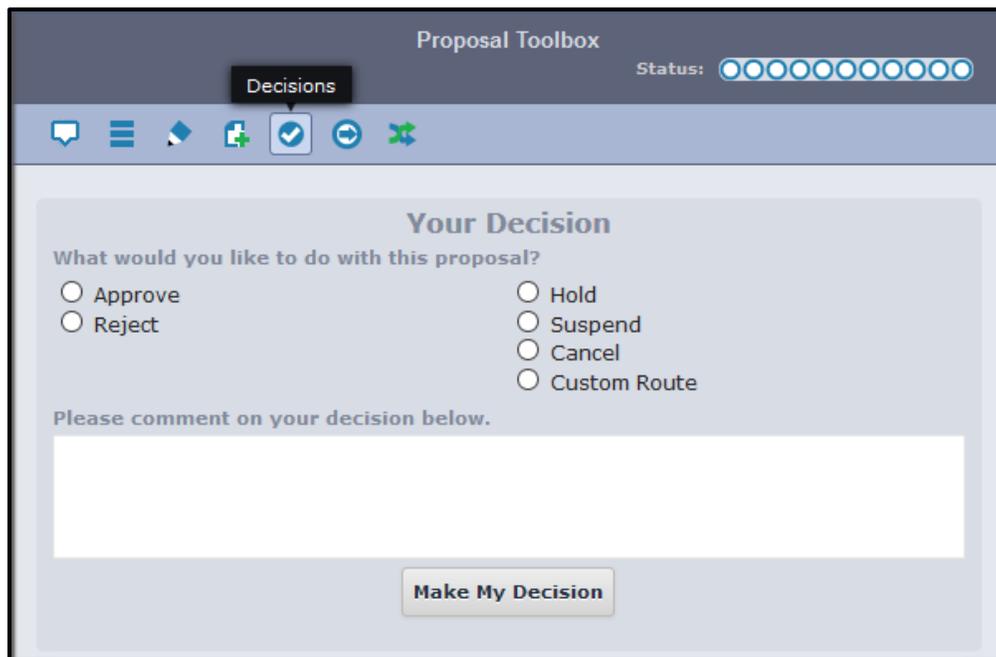


Selecting the Files icon allows you to upload files as well as view the files attached to the proposal. There is no limit to the number of files that may be uploaded to a proposal.

Selecting the Decisions icon allows you to make a decision on the proposal and enter a comment for your decision. By the default, the **Approve** and **Reject** buttons will display. However, you may have additional options based on the approval process. Entering a comment is optional when selecting Approve. However, all other options require a comment to be entered, simply select the radio button for your desired decision and click "Make My Decision". Once you have made a decision, your work on this proposal is

complete. If approved, the proposal may advance providing you are the only individual on the step or all other individuals on the step have also made a decision. If rejected, the proposal may be referred to the Originator or the previous step, depending on the settings determined by the Administrator. A message appears indicating your decision has been made and if the proposal is advancing or being referred.





Additional options may include hold, suspend, and cancel. If you select one of these options, a request will be sent to the Administrator to approve or reject your request. The definition of each option is listed below:

- **Hold** – Submits a request for the proposal to not advance in the approval process. The request is sent to the Administrator, will approve or reject the request. The users on the step will be able to continue to work on the proposal, however, it will not advance in the workflow until the hold is removed. Administrators have the ability to remove a hold on a proposal.
- **Cancel** – Submits a request to cancel the proposal and delete it from Curriculog. The request is sent to the Administrator who will approve or reject the request. No work will be allowed on the proposal during this time. If the Administrator approves the cancel request, the proposal will be referred back to the Originator. The Originator may then re-launch the proposal or cancel it, which will delete the proposal from Curriculog. If the Administrator rejects the cancel request, the proposal will remain on the current step awaiting a decision.
- **Suspend** – Submits a request for the proposal to not advance in the approval process. No work may be done on the proposal and it will not advance in the workflow until the suspend decision is removed. The request is sent to the Administrator who will approve or reject the request. Additionally, the Administrator has the ability to remove a suspend decision placed on a proposal.

Selecting one of these options will send a request to the Administrator. Additionally, it will be noted in the step within status.

Set a Custom Route

An additional decision that may be available to you is a custom route. A custom route is an additional ad hoc step outside the steps in the approval process. Typically you would use this type of decision if key individuals that are not customarily involved in the decision-making process or want to be included. Custom routes require Administrator approval. If the custom route option is available, it will be listed in **Your Decision** within

the Proposal Toolbox. This will allow you to bring someone else into the proposal that is not included within the current steps of the proposal.

Select the radio button to the left of Custom Route and select "Make My Decision".

The screenshot shows the 'Proposal Toolbox' interface. At the top, there is a 'Decisions' tab and a 'Status' indicator with a progress bar. Below this is a toolbar with several icons. The main content area is titled 'Your Decision' and asks 'What would you like to do with this proposal?'. There are six radio button options: 'Approve', 'Reject', 'Hold', 'Suspend', 'Cancel', and 'Custom Route'. The 'Custom Route' option is selected. Below the options is a text input field with the placeholder text 'Please comment on your decision below.' and a 'Make My Decision' button at the bottom.

The screenshot shows the 'My Pending Custom Route' configuration screen. The title is 'My Pending Custom Route'. Below the title is a sub-header 'Custom Route (requested by Karina Acuna)'. There is a 'Step Name' field containing 'Custom Route'. Below this are several expandable sections: 'Participants', 'Rules', 'Decisions', and 'Deadlines/Reminders'. The 'Participants' section is expanded, showing an 'Add Participant' button.

The custom route workflow opens allowing you to choose the participant you would like to custom route the proposal to. Select the grey arrow to the left of Participants and the option will expand. Select "Add Participant".

You may utilize the + symbol to expand the hierarchy items to view roles and expand the users below each role. Click on the user to select them and their row will be highlighted blue. Next, select "Add Role(s)". You may select multiple roles or individuals within this workflow.

The screenshot shows a dialog box titled 'Who is involved on this step?'. It displays a hierarchy of roles and users. The hierarchy is as follows: 'Role Types' (expanded), 'Hierarchy' (expanded), 'University of Houston' (expanded), and '-Curriculog User' (expanded). Under '-Curriculog User', there are five user names: 'Ann Christensen', 'Annie Aguanno', 'Beckham Dossett', 'Cassandra Heavrin', and 'Catherine Horn'. The 'Cassandra Heavrin' row is highlighted in blue. At the bottom of the dialog are two buttons: 'Add Role(s)' and 'Cancel'.

Rules include four options. Within rules, 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. You should restrict it to one of the options available from the drop down menu that is not “Every user (login not required).” UH currently does not allow for guest view of proposals without a login.

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.

Additionally, a comment will need to be entered before selecting “Request Custom Route”. Once a custom route is requested, it may be canceled by navigating to the custom route icon, and selecting “Cancel Custom Route”.

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 approved).

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