

## Proposal Route Back

[Overview](#) | [How It Works](#) | [After a Request is Sent Back](#) | [Example](#) | [Route Back Emails](#)

### Overview

- Some users have the ability to "send request back to" a prior step. This is commonly referred to as "route back".
- Whether or not users have this ability will depend on which privileges were assigned to them within the workflow ([See Step 7 here](#)). The default for this permission is "Deny".

### How It Works

1. User opens/views request.
2. In the request toolbox, they click the "route back" button. This will open two additional options: "Send request back to" and "On return this request should".
3. Under "Send request back to," the user selects the step the request should return to.
4. Under "On return this request should", the user selects how the proposal is routed back to the step that originated the route back.
  - There are two options: "Go back through the entire workflow" and "Return to the current step".
  - If "Go back through the entire workflow" is selected, the request could potentially go through many steps before returning to the point where a user selected the "route back" option.
  - If "Return to current step" is selected, then the request will return to wherever it's being sent back to, and then once that step participant has acted upon it, the request will return directly to the same step where the "route back" option was first selected.
5. Under "please comment on your decision below", the user should add a comment indicating their reason for sending back the proposal.

[DOWNLOAD PDF](#)

## Proposal Toolbox

Status: Pending

Decisions: ✔ ○ ○

DECISION WORKFLOW ACTIVITY

---

✔ APPROVE

✘ REJECT

⏸ SUSPEND

↩ ROUTE BACK

Send Request Back To:

Please comment on your decision below. required

Enter comment here

On return this request should:

Go back through entire workflow

Return to current step

SUBMIT DECISION

### After a Request is Sent Back

Once a request is sent back, this will be reflected in the request's decisions list, and in the status of the steps. In the example below, the request was sent back from Step 1 to the Author step, and as a result, there is an additional Author step in the list of total steps, indicating that the author must now approve again for the workflow to move forward.

## Proposal Toolbox

Status: Pending

Decisions: ✔ ↩ ○ ○

DECISION   **WORKFLOW**   ACTIVITY

---

Author: Nick Diao Status: *Approved*

Deadline: *No deadline*

Step 1 Status: *Sent Back*

Deadline: *No deadline*

Author Status: *Pending*

Deadline: *No deadline*

### Example

If you have a workflow with 5 steps, and the participant at step 4 selects the “route back” option – and uses the “Send Request Back To” option to send it back to Step 1 – here’s what would happen if they select “Go back through the entire workflow” versus “return to current step”.

#### *Go Back through the Entire Workflow*

After the Step 1 participant (the request author) acts on the request, it will then proceed to steps 2-3 before returning to Step 4.

#### *Return to Current Step*

After the Step 1 participant (the request author) acts on the request, the request will then return to Step 4.

### Route Back Emails

CURRICULUM PATH: Academic Scheduling > Settings > Workflows > (Select Workflow) > (Click Step ) > Edit Email Templates

SCHEDULING PATH: Academic Scheduling > Workflows > (Select Workflow) > (Click Step ) > Edit Email Templates

Users can specify a custom email template for approvers and viewers if the request is routed back to that step. Learn more [here](#).