Sabbatical Application Process
Using Faculty Success (*formerly Activity Insight*) Workflow

I.   Complete Application and Submit for Review

The process to apply for sabbatical leave is divided into two components: 1) filling out the application using the Sabbatical Application screen in Faculty Success/Activity Insight; and 2) submitting the application for review using Workflow.

Step 1 – Filling out the Application: Log into AI, click into the Sabbatical Application screen and create a new item by clicking the "**Add New Item**" button (upper left area of screen). Fill out the first two sections titled Application Header and Detailed Application Information.

Note: Leave the section titled Sabbatical Change Request blank. This section will only be used for applications that have been fully reviewed and approved, but which later may require changes, such as leave dates or budgetary information.

Step 2 – Submitting the Application: Respond
to the invitation e-mail from
dmworkflow@watermarkinsights. You should be receiving this message on or around Oct 13. Click on the "**Open Now**" link which opens the first step of the Workflow process, displayed below, and which allows you to submit your application into the review process.
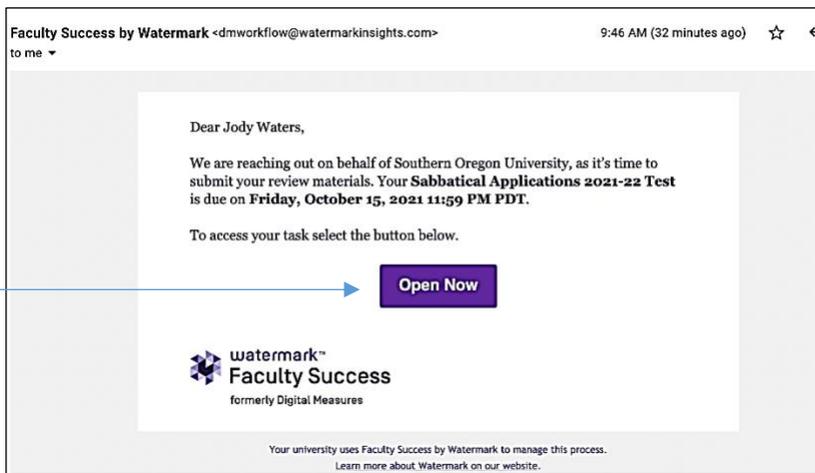

Click the "**Refresh Report**" link (this is imperative) before submitting the application into the review process.

Then, click the "**Adobe**" icon to preview your application before submission.


To submit the application, click the "**Action**" button (upper right-hand corner of the screen), and choose the **"Submit App"** option. This will send your application into the AI Workflow review process. Workflow will automatically notify the Program (or Division) Personnel Committee that your application is ready for review.
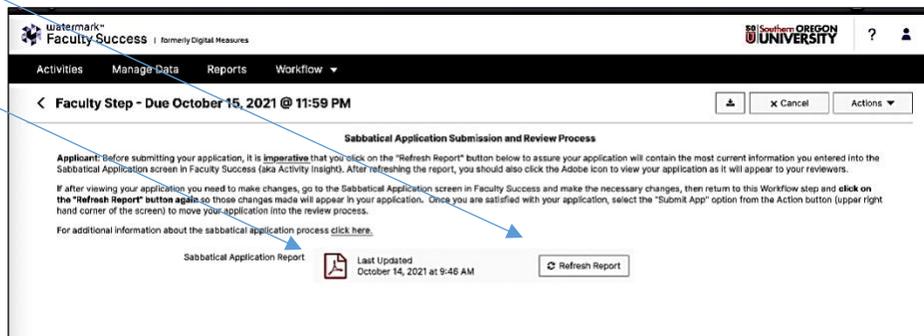
II.   Review of the Sabbatical Application

After submission, the application will move to the first level of review, conducted by your Program (or Division) Personnel Committee. That committee will leave their feedback and move the application onto further review by the Program Chair/Coordinator. This review process repeats with feedback from the Division Director, the Faculty Personnel Committee and finally, the Provost.

After the review process is finished, the application moves back to your Workflow Inbox, and you are notified with an email message from dmworkflow@watermarkinsights.com. This will give you the opportunity to read all of the feedback.
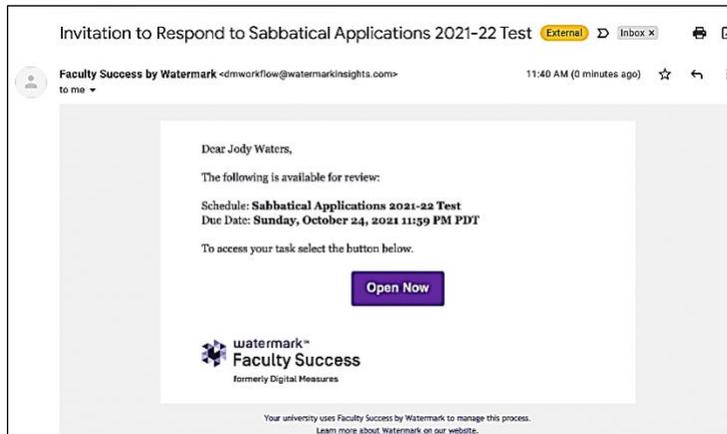
Click on the "**Open Now"** button in this email to see the last step of the Workflow (see below).
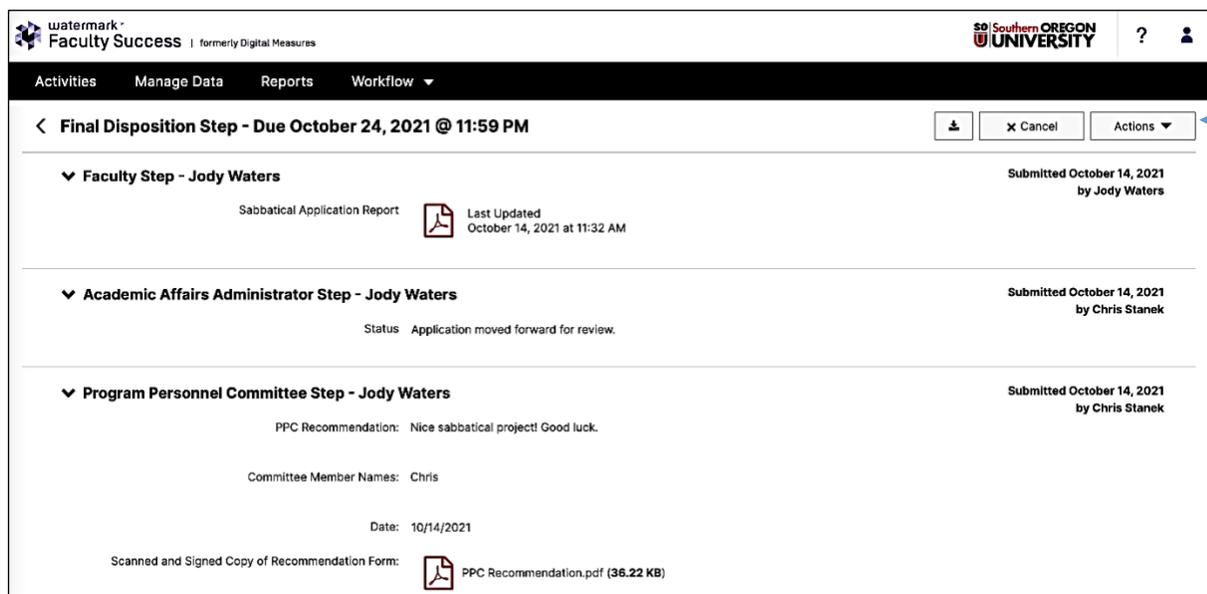
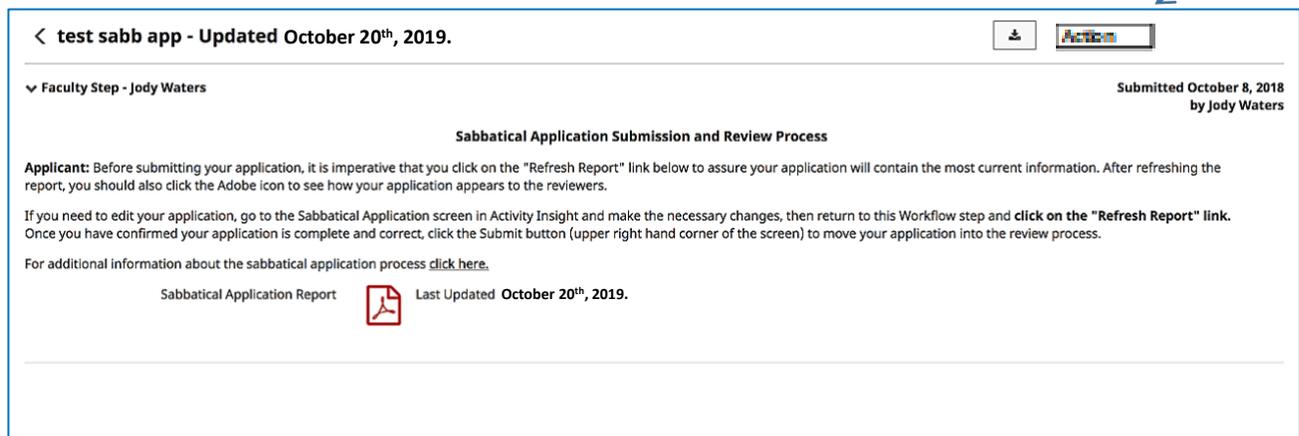Scroll through this screen to see all the feedback provided by reviewers.

This final step serves as notification that the review is finished.

At the bottom of the screen choose "Yes" to the prompt: "I have read the feedback entered" and then click the "**Action**" button (upper right-hand corner of the screen) and select **"Close Process"** to complete the Workflow.

III.   Changes to the Sabbatical Application (prior to approval)

Recall option– Applicant needs changes to original application: If necessary, you have the option to recall your application in order to make changes, however *this can only be done if the application hasn't moved past the Program (or Division) Personnel Committee review step*. To initiate a recall, go to Workflow Tasks, open the sabbatical application process, click the Action button (located near the top right part of the screen) and choose the "Recall" option.

After recalling the application, you can go back to the Sabbatical Application screen in AI and open your application to make necessary changes. Afterwards, you need to return to your Workflow Inbox, open the item and re-submit your application into the review process (see page 1 above).

> ‹ **test sabb app - Updated** October 20th, 2019.   [⬇] [Action]
>
> ⌄ **Faculty Step - Jody Waters**   Submitted October 8, 2018
>   by Jody Waters
>
> **Sabbatical Application Submission and Review Process**
>
> **Applicant:** Before submitting your application, it is imperative that you click on the "Refresh Report" link below to assure your application will contain the most current information. After refreshing the report, you should also click the Adobe icon to see how your application appears to the reviewers.
>
> If you need to edit your application, go to the Sabbatical Application screen in Activity Insight and make the necessary changes, then return to this Workflow step and **click on the "Refresh Report" link.** Once you have confirmed your application is complete and correct, click the Submit button (upper right hand corner of the screen) to move your application into the review process.
>
> For additional information about the sabbatical application process click here.
>
>   Sabbatical Application Report   [PDF]   Last Updated **October 20th, 2019.**

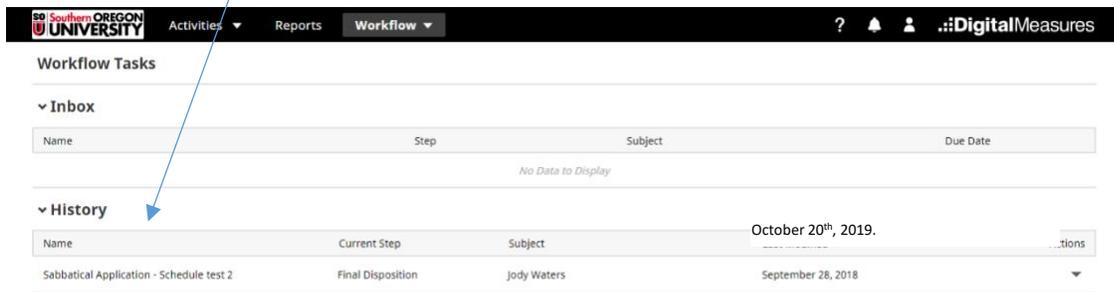**Send Back option** – Reviewer needs additional information:

Reviewers have the option to "**Send Back**" the application to its prior step. This might be initiated by the Program (or Division) Personnel Committee as notification to the applicant that something is missing and requests that the applicant makes modifications. Additionally, other reviewers in the process can initiate the "**Send Back**" feature, possibly indicating something more may be needed in the feedback previously submitted. When reviewers use the "**Send Back**" feature, they are required to enter a message about why the application is being sent back. That message appears in an email to the person(s) that is/are responsible for the prior step in the process.

If the application returns to you as the applicant, then open your application in the Sabbatical Application screen in AI and make changes as requested. Save these changes (clicking on the Save button in the upper right-hand corner of the screen) and then resubmit the application into the Workflow review process (see page 1 above).

Please note: for any changes to a sabbatical AFTER it has been approved, you will need to complete a [Request for Sabbatical Change](), located on the Provost's website, for Chair, Director, and Provost approval.

IV.   Tracking Progress of the Application Review

If at any time, you want to re-read feedback left on your application, click on the appropriate item in your **Workflow History** and scroll through the screen to see feedback that has been left to date.