Accessing the Application

The Sabbatical Form was automated and launched in September 2014. The application can be accessed from either the Agora Portal or the Provost’s webpage.

From the Agora Portal: log into the Agora Portal and access the link from the My Services tab, Academics and Courses. The link is called “Sabbatical and Faculty Fellowship Application.”

Access the Provost Office website at: http://www.bc.edu/content/bc/offices/avp/faculty_awards_and_grant.html. Scroll down to the section labeled “Sabbatical” and follow the instructions to access the form. You will be prompted to log in to access the form.

Applicant Process

The drop-down portion of the form at the top allows the applicant to choose the form to be used. Currently, only the Sabbatical form has been automated. Going forward, other forms will be available and the drop-down will list all that are available.
The bottom portion of the page is the Action List which will list any saved forms that an applicant has started as well as pending forms that need to be processed.

Selecting <Go> opens the form.

The top portion of the form contains instructions. It indicates the academic year (1) for which the form applies plus school-specific instructions (2).

The form opens with several fields prepopulated with information from the HR system. Please review the information and contact the Provost’s Office if the information is not correct.
All required fields are noted with a double red asterisk (**). The form can be partially completed and saved to return to at a later date to complete. See below for directions on accessing your saved forms.

The character limit for each text box is 1000. There is the option to attach documents for each text box. To attach document to the form, select “Click here for attachment section.”

This jumps down to the notes and attachment section:
Click on <Browse> (1), find the document to attached and click <add> (2). If you do not click the <add> button, the document will not be attached. If a document is added, a note must be included (3).

Saving the form
In order to save the form and return to complete it later, Sabbatical Type (1), and, if Regular Sabbatical is checked, Sabbatical Season (2) must be complete. The form can then be saved.

Accessing saved forms is done through the Action List.
On the home page, the Action List | Outbox in located beneath the drop-down for the sabbatical form.
Click on the ID number on the left-hand side. This opens the saved form.

When the form is complete and ready to submit, review the Approver Details section. This identifies the chair-person (if applicable) and dean to whom the form will be routed. If these details are incorrect, please contact the Provost's Office.

If these details are correct, click <Verified> in the Approver(s) Details box and then click the <Submit> button at the bottom of the page.

The <Close> button simply closes the form. <Cancel> deletes the form completely. Be sure you no longer want to use the form as it cannot be retrieved once it has been deleted.

The progress of submitted forms is also accessible through the action list.

- The Route Status indicates if it is Saved, Enroute, Approved, or Disapproved.
  - If the route status is Saved, the form needs to be completed by the applicant
  - If the route status is Enroute, the approver is being requested to approve (they can also deny)
  - If the route status is Approved (not shown), the action indicates “Final” which means that no additional action is required.
If the route status is Disapproved, the applicant must “acknowledge” this action. The form will need to be opened and the acknowledge button at the bottom clicked.

- The Action Requested indicates what is being asked for of the approver.
  - “Complete” means that the applicant must complete the form and submit
  - “Approve” means that the approver needs to take action on the form
    - Note: if the form is in the applicant’s action list, the applicant must take action on the form.
  - “Acknowledge” means that the applicant must indicate that s/he has reviewed the form
    - Typically this is only when the form has been rejected.
Outbox

The Outbox contains forms that have been submitted by the applicant and have no further action required. These may be forms that are in the workflow process but no action is required on the part of the applicant. If there is a form you wish to delete, open the form, scroll to the bottom, and click “Cancel.”

Route Log

Additional information on that status of the form can be viewed in the route log. To access this, select the magnifying glass on the right-hand side of the form in the action list or outbox.

This will indicate the actions taken and by whom along with Pending Action Requests.
Approval process

Chairpersons, if applicable, and deans must approve the form. Once that is complete, the Provost’s Office receives the form for documentation purposes.

The chairperson and dean have the ability to approve, reject, or return the form for additional information or changes.

To open a sabbatical request, the chairperson or dean will need to log into the application and click on the ID in the Action List. This opens the form in a “read only” mode. The approvers may not make any changes directly to the form.

Clicking the ID on the left, opens the form.

<table>
<thead>
<tr>
<th>Action List</th>
<th>Outlook</th>
</tr>
</thead>
<tbody>
<tr>
<td>One item retrieved.</td>
<td></td>
</tr>
<tr>
<td>Id</td>
<td>Type</td>
</tr>
<tr>
<td>0412</td>
<td>Sabbatical form</td>
</tr>
</tbody>
</table>

Sabbatical Type: 80% Sabbatical

Name: Henry Hudson

Department: Northwest Passage

Rank: Professor

Tenured: Yes

Semester/year of last Sabbatical: 1 Semesters of service since last Sabbatical:

Leaves of absences in the past six years (faculty fellowships, unpaid leave)

test

Project Title

test

Project Objectives

test

Significance of Project

test
An approver has three options:

1. The form can be approved.
2. The form can be rejected. It is recommended that the Note section be used to indicate why the form is being rejected.
3. The form can be returned to either the applicant or any approver in the workflow. It is recommended that the Note section be used to indicate why the form is being returned.

**Approving a form**

When a form is approved, it is routed to the next approver in the workflow. The workflow approval is as follows:

1. Applicant submits the form
2. Chairperson (if applicable) approves the form
3. Dean approves the form
4. Provost receives the form for documentation purposes

**Return to applicant or a previous approver**

If additional information or clarification is desired, anyone in the approval workflow can send the form back to the applicant or a previous approver. This is the preferred method for needed changes to the form.

1. If the form is returned to the applicant (initiator), the applicant should include what information is requested and send through the approval process again. The form will again go through the entire approval process (i.e. chairperson, if applicable, then to the dean). It is recommended that the notes section be used to identify what was added or changed.
2. If the dean returns the form to the chairperson (this is chosen from the dropdown), the applicant will not receive the form. The chairperson will need to make a change and resubmit. It is recommended that the notes section be used to identify what was added or changed.

Rejecting a form
If a form is rejected, the form is routed to the applicant for acknowledgement. The form cannot be revised and sent through the process again. A new form will need to be initiated. The applicant must acknowledge that the form was rejected. The form is opened and the <Acknowledge> button at the bottom is selected. This then moves the form to the Outbox.

Please note: rejecting a form will not allow the applicant to make edits and resubmit. It is strongly recommended that you return the form to the applicant for additions and/or edits before you reject the form.