

## **Sabbatical/Leave Requests**

Objective: When you need to open a case for a candidate to request a Sabbatical/Leave.

**Step 1: Sign-in to Interfolio through [Gibson Online](#)**

*Note: You can also log-in directly through Interfolio - [account.interfolio.com/sso](https://account.interfolio.com/sso).*

**Step 2: Proceed to the Review, Promotion and Tenure module on the left side of your home page in Interfolio and click “Cases”.**

**Step 3: Click “Create Case” and select your correct unit/department.**

**Step 4: Click the template “Sabbatical and Leave Requests”.**

*Note: Some schools may have different name variations for their Sabbatical and Leave Requests template. Check with your Dean’s Office if you are unable to find the correct template.*

**Step 5: Begin to fill out “Case Information”. You can “Search for a Candidate” by filling in their last name. This will auto populate your “Candidate’s First Name, Candidate’s Last Name, and Candidate’s Email”.**

*Note: If you did not find your candidate, you can enter their information manually. Be sure to use a Tulane email address for “Candidate’s Email”*

**Step 6: Click “Save and Continue” and the next page “Candidate Requirements” will appear.**

**Step 7: Fill out “Candidate Requirements” section. This section includes the date the candidate’s packet is due, any additional instructions, as well as packet requirements. Once complete, click “Continue”.**

*Note: You can add more requirements if need-be.*

**Step 8: The “Internal Case Section” is next. This is the default. Make changes as needed, but you will probably not need to. Click “Continue”.**

**Step 9: The “Case Review Steps” shows you the routing for your current sabbatical case. If no changes, click “Continue”.**

**Step 10: The “Case Summary” section is the last section in creating a case. This is just a summary of Steps 5-9. Click “Return to Case” at top right.**

**Step 11: Click “Send Case” in top right and click “Candidate”. This notifies the candidate that the case is in their queue. The candidate will then upload the documents requested.**

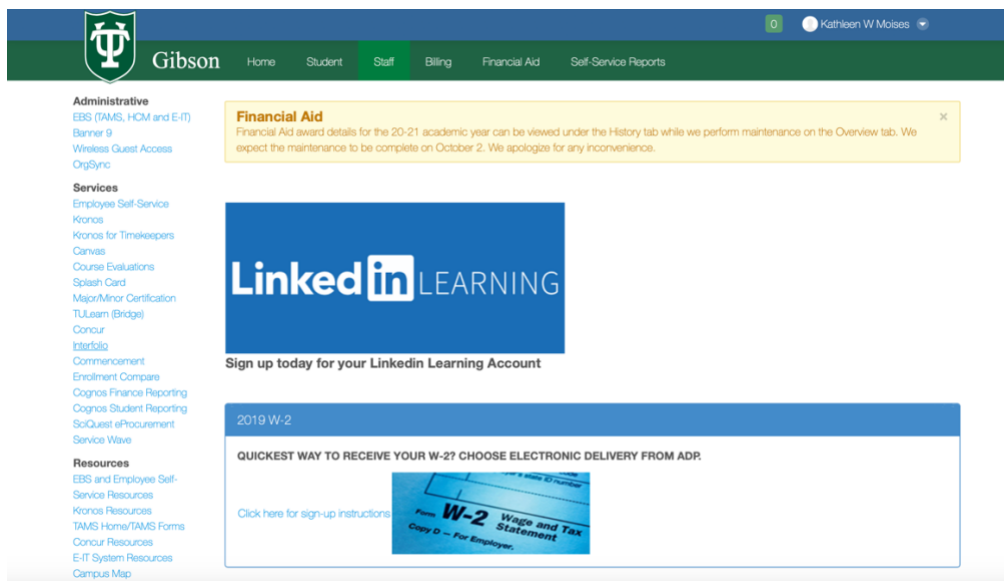
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## Finished

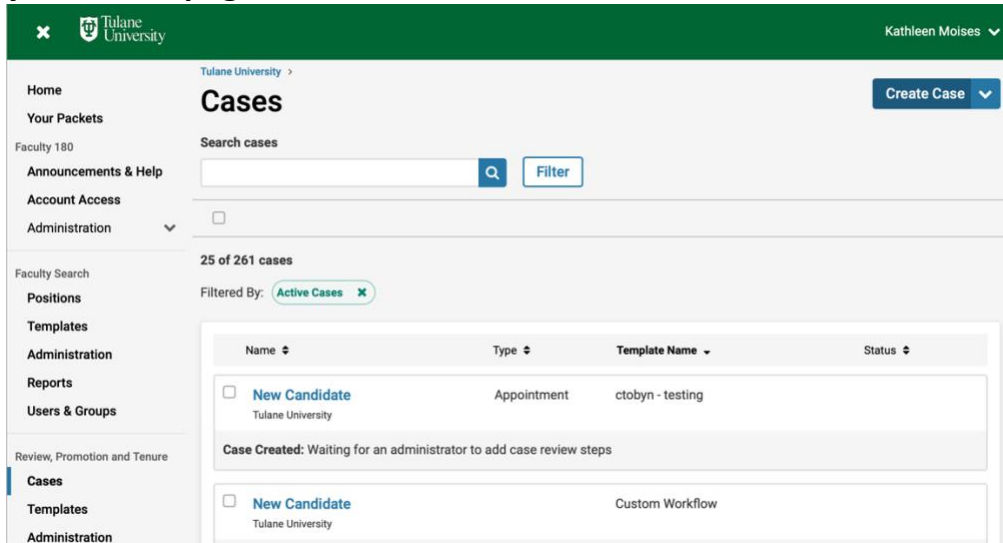
*For an illustrated version of these instructions, please continue through the rest of the document.*

## Step 1: Sign-in to Interfolio through [Gibson Online](#)

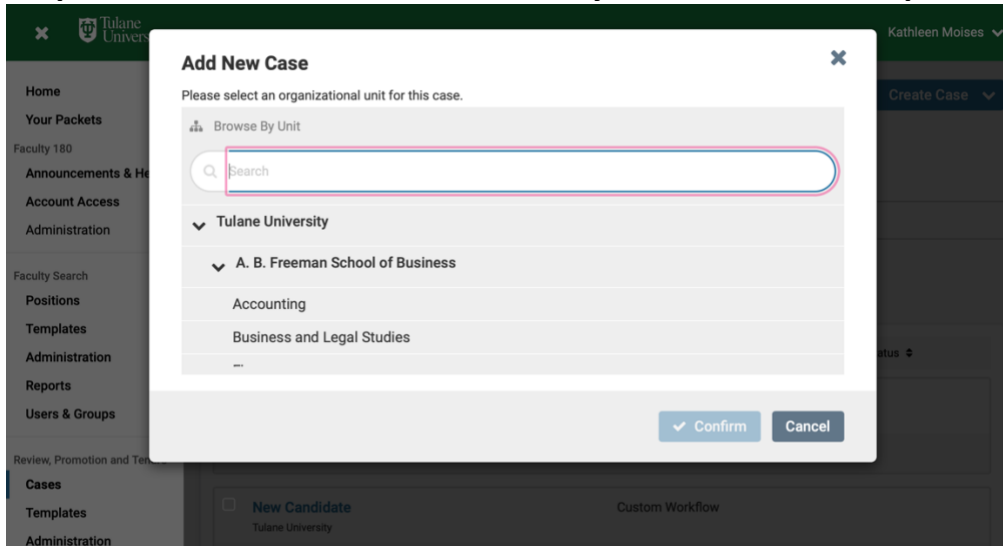
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**Step 2: Proceed to the Review, Promotion and Tenure module on the left side of your home page in Interfolio and click “Cases”.**



**Step 3: Click “Create Case” and select your correct unit/department.**



**Step 4: Click the template “Sabbatical and Leave Requests”.**

*Note: Some schools may have different name variations for their Sabbatical and Leave Requests template. Check with your Dean’s Office if you are unable to find the correct template.*

# 1- Pager

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**Step 5: Begin to fill out “Case Information”. You can “Search for a Candidate” by filling in their last name. This will auto populate your “Candidate’s First Name, Candidate’s Last Name, and Candidate’s Email”.**

*Note: If you did not find your candidate, you can enter their information manually. Be sure to use a Tulane email address for “Candidate’s Email”*

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**Step 6: Click “Save and Continue” and the next page “Candidate Requirements” will appear.**

**Step 7: Fill out “Candidate Requirements” section. This section includes the date the candidate’s packet is due, any additional instructions, as well as packet requirements (defaulted to request CV, Sabbatical Proposal, and Sabbatical Leave & Request Form). Once complete, click “Continue”.**

*Note: You can add more requirements if need-be.*



**Step 8: The “Internal Case Section” is next. This internal section helps committee members or individual users organize the materials they add as part of the review. This is the default. Make changes as needed. Click “Continue”.**

**Step 9: The “Case Review Steps” shows you the routing for your current sabbatical case. If no changes, click “Continue”.**

*Note: Different schools have different routing.*

# 1-Pager

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**Step 10: The “Case Summary” section is the last section in creating a case. This is just a summary of Steps 5-9. Click “Return to Case” at top right.**

The screenshot shows the 'Case Summary' page in the Interfolio system. The page title is 'Case Summary' with a '< Return to Case' button in the top right. The main content area is divided into several sections: 'Case Information' (with an 'Edit' button), 'Candidate Requirements' (with an 'Edit' button), 'Included Forms' (listing 'Sabbatical & Leave Request Form'), 'Candidate Documents' (with a right-pointing arrow), 'Internal Case Sections' (with an 'Edit' button), and 'Case Review Steps' (with an 'Edit' button). The 'Internal Case Sections' section includes fields for 'Department', 'Dean's Office', and 'Provost Office'. On the right side, there is a 'Creating a Case' sidebar with a numbered list of steps: 1. Case Information, 2. Candidate Requirements, 3. Internal Case Sections, 4. Case Review Steps, and 5. Case Summary (which is highlighted with a blue circle). The left sidebar contains navigation options like 'Home', 'Your Packets', 'Faculty 180', 'Announcements & Help', 'Account Access', 'Administration', 'Faculty Search', 'Positions', 'Templates', 'Administration', 'Reports', 'Users & Groups', 'Review, Promotion and Tenure', 'Cases', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The top navigation bar shows 'Tulane University > Cases > Joey Couvillon' and the user name 'Kathleen Moises'.

**Step 11: Click “Send Case” in top right and click “Candidate”. This notifies the candidate that the case is in their queue. The candidate will then upload the documents requested.**

The screenshot shows the 'Candidate Packet' page in the Interfolio system. The page title is 'Joey Couvillon' with a 'Send Case' dropdown menu and a 'Case Options' dropdown menu in the top right. The 'Send Case' dropdown menu is open, showing options: 'Candidate', 'Notify Candidate', 'Forward to Department', and 'Department'. The main content area is divided into several sections: 'Unit' (Academic Affairs Test Environment), 'Template' (Test Template - Sabbatical Requests), 'Case Materials' (with 'Case Details' link), 'Search case materials by title' (with a search bar and a magnifying glass icon), 'Expand All' and 'Collapse All' buttons, 'Download', 'Share', 'Settings', and 'Move' buttons, 'Candidate Packet' (with a note: 'Any materials added to the candidate packet will be visible to the candidate and available for them to use in their current case. The candidate will be able to replace or delete any files in an unlocked section before they submit.'), 'Candidate Documents' (with an 'Unlocked' status and a 'Lock' button), 'CV 1 required' (with an 'Add File' button), 'Sabbatical Proposal 1 required' (with an 'Add File' button'), and 'No files have been submitted.' for both CV and Sabbatical Proposal sections. The left sidebar contains navigation options like 'Home', 'Your Packets', 'Faculty 180', 'Announcements & Help', 'Account Access', 'Administration', 'Faculty Search', 'Positions', 'Templates', 'Administration', 'Reports', 'Users & Groups', 'Review, Promotion and Tenure', 'Cases', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The top navigation bar shows 'Tulane University > Cases >' and the user name 'Kathleen Moises'.