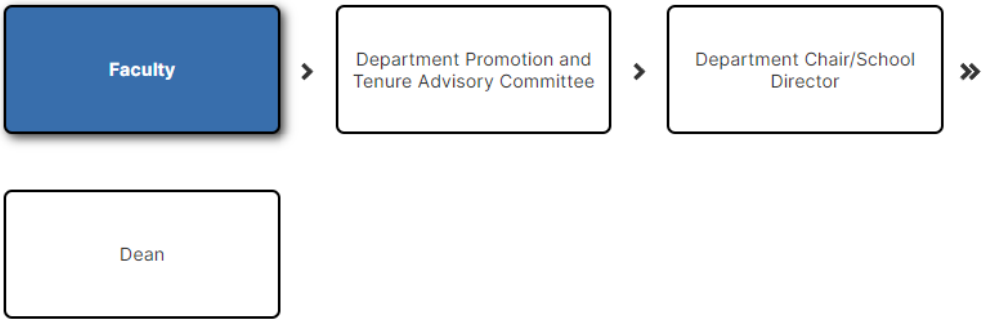
SHSU Watermark Workflow
Post-Tenure Review Process Help Guide

Watermark Workflow evaluations for Post-Tenure Review follow the multistep process illustrated in the flowchart below. Beginning at the Faculty submission step, the review portfolio is sent on to the Department Promotion and Tenure Advisory Committee (DPTAC) for a vote and evaluation. The review portfolio and DPTAC evaluation are then sent through administrative acknowledgement steps by the Department Chair/School Director and finally the Dean.



Email Messages

Participants in the review process will receive automated emails with links from Watermark (addressed as Office of The Provost) when their step is initiated. The first step is the Faculty Step, and those faculty up for a review process will receive a message like the following:

Dear Test Faculty,

It's time to submit your review materials for the following:

Process:	Post-Tenure Review - Spring 2023 (Demo)
Due Date:	Wednesday, March 15, 2023 11:59 PM CDT

If you do not submit your materials by the due date, this will automatically advance to the Department Promotion and Tenure Advisory Committee review.

In accordance with APS 980204, tenured faculty members must upload a complete Faculty Review Portfolio in Watermark Faculty Success by the due date. Please reference the training resources located on the Academic Affairs Watermark website for more information. The due date for your submission is **no later than March 15th, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

SUBMIT REVIEW MATERIALS

If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/9c02b468-8397-455f-96b8-0a30ef1c3b10/step/3eb8bfc1-692d-41fe-81a8-37e751f5a972/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2390354

The Next step with faculty involvement will be the Departmental Promotion and Tenure Advisory Committee (DPTAC) step. Once a faculty member submits their Post-Tenure materials to the DPTAC members, the DPTAC chair will receive an automated email:

Dear Member DPTAC,

The following submission is now ready for your review:

Process:	Post-Tenure Review - Spring 2023 (Demo)
Candidate:	Test Faculty
Due Date:	Monday, April 3, 2023 11:59 PM CDT

If you do not submit your review by the due date, this will automatically advance to the Department Chair/School Director review.

In accordance with APS 980204, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of tenured faculty members every fifth year after receiving tenure, a promotion, returning to a faculty position following an administrative assignment, or after a previous comprehensive performance evaluation. Please reference the training resources located on the Academic Affairs Watermark website for more information.

A written summary for each individual candidate will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the candidate, the department chair/school director, and dean/executive director's review. The due date for your submission is **no later than April 3rd, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/9c02b468-8397-455f-96b8-0a30ef1c3b10/step/81e8b763-6b1c-4ac3-8f48-88a2c6a13f7c/assignee/2388404?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2388404

Dear Chair DPTAC,

The following submission is now ready for your review:

Process:	Post-Tenure Review - Spring 2023 (Demo)
Candidate:	Test Faculty
Due Date:	Monday, April 3, 2023 11:59 PM CDT

If you do not submit your review by the due date, this will automatically advance to the Department Chair/School Director review.

In accordance with APS 980204, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of tenured faculty members every fifth year after receiving tenure, a promotion, returning to a faculty position following an administrative assignment, or after a previous comprehensive performance evaluation. Please reference the training resources located on the Academic Affairs Watermark website for more information.

A written summary for each individual candidate will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the candidate, the department chair/school director, and dean/executive director's review. The due date for your submission is **no later than April 3rd, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/9c02b468-8397-455f-96b8-0a30ef1c3b10/step/81e8b763-6b1c-4ac3-8f48-88a2c6a13f7c/assignee/2388403?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2388403

The following step will be an acknowledgement by the Department Chair/School Director. Once the DPTAC chair submits the DPTAC vote and evaluation for a Post-Tenure review process in Watermark Workflow, the Department Chair/School Director will receive an automated email:

Dear Department Chair,

The following submission is now ready for your review:

Process:	Post-Tenure Review - Spring 2023 (Demo)
Candidate:	Test Faculty
Due Date:	Monday, April 10, 2023 11:59 PM CDT

If you do not submit your review by the due date, this will automatically advance to the Dean review.

In accordance with APS 980204, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of tenured faculty members and provide a written summary of each individual candidate. This summary will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the candidate, the department chair/school director, and dean's review. Please reference the training resources located on the Academic Affairs Watermark website for more information.

If the DPTAC evaluation finds the faculty member's performance to be unsatisfactory, please begin the PAFD process, which will take place outside of Watermark.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/9c02b468-8397-455f-96b8-0a30ef1c3b10/step/d5ad6d85-e695-4c1e-93e7-9d649314809f/assignee/2354062?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2354062

The final step will be the Dean's acknowledgement step. Once the Department Chair/School Director has submitted their acknowledgement of receipt of the DPTAC vote and evaluation in Watermark Workflow, the College Dean/Executive Director will receive an automated email:

Dear Dean,

The following submission is now ready for your review:

Process:	Post-Tenure Review - Spring 2023 (Demo)
Candidate:	Test Faculty
Due Date:	Monday, April 17, 2023 11:59 PM CDT

If you do not complete this by the due date, it will automatically complete this process.

In accordance with APS 980204, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of tenured faculty members and provide a written summary of each individual candidate. This summary will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the candidate, the department chair/school director, and dean's review. Please reference the training resources located on the Academic Affairs Watermark website for more information.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser's address bar:

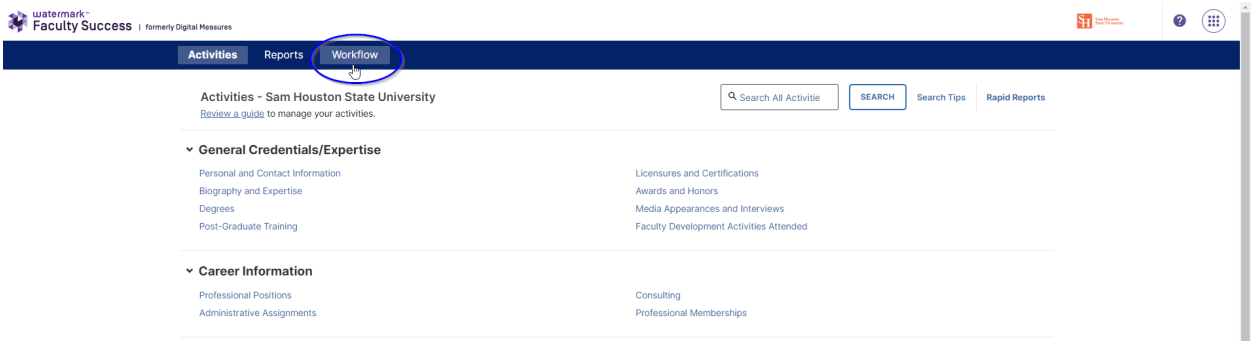
https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/9c02b468-8397-455f-96b8-0a30ef1c3b10/step/032d2439-1c88-4971-848a-1edba9a7cbcd/assignee/2354062?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2354062

While the automated email will provide a link to Watermark, you can also navigate to Watermark following the login instructions below.

Logging into Watermark Faculty Success

1. Go to Watermark Faculty Success (https://login.watermarkinsights.com/connect/samhoustonstateuniversity)
2. NOTE: You may receive a two-factor authentication (DuoSecurity) prompt to connect via campus Single Sign-On (SSO).

3. Click the Workflow link in the navigation bar.

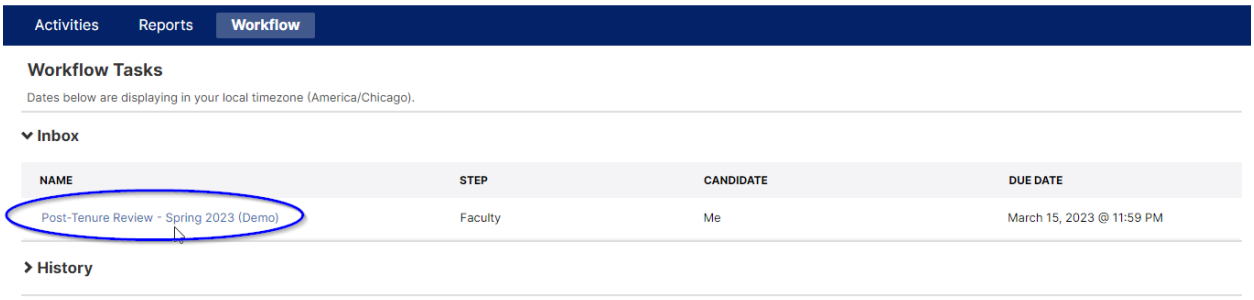


4. Select an item from Workflow Task Inbox to enter your step in the process.

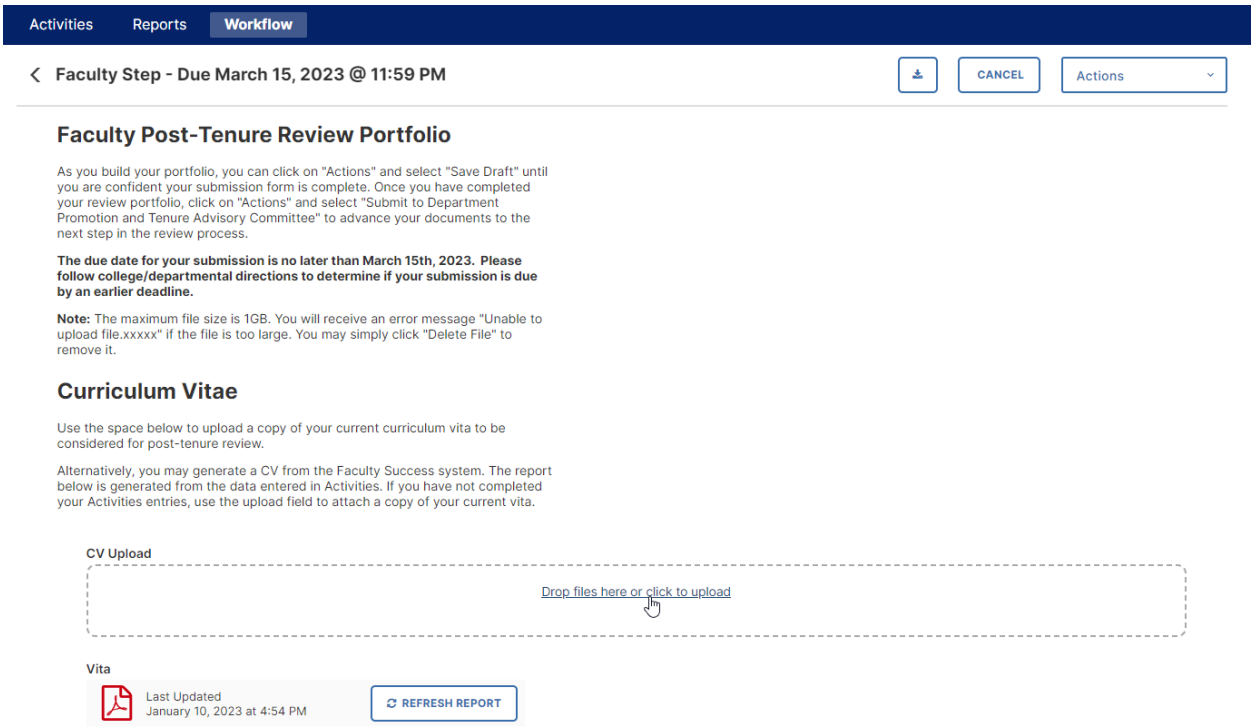
Watermark Workflow Post-Tenure Review Process Steps

Faculty Step

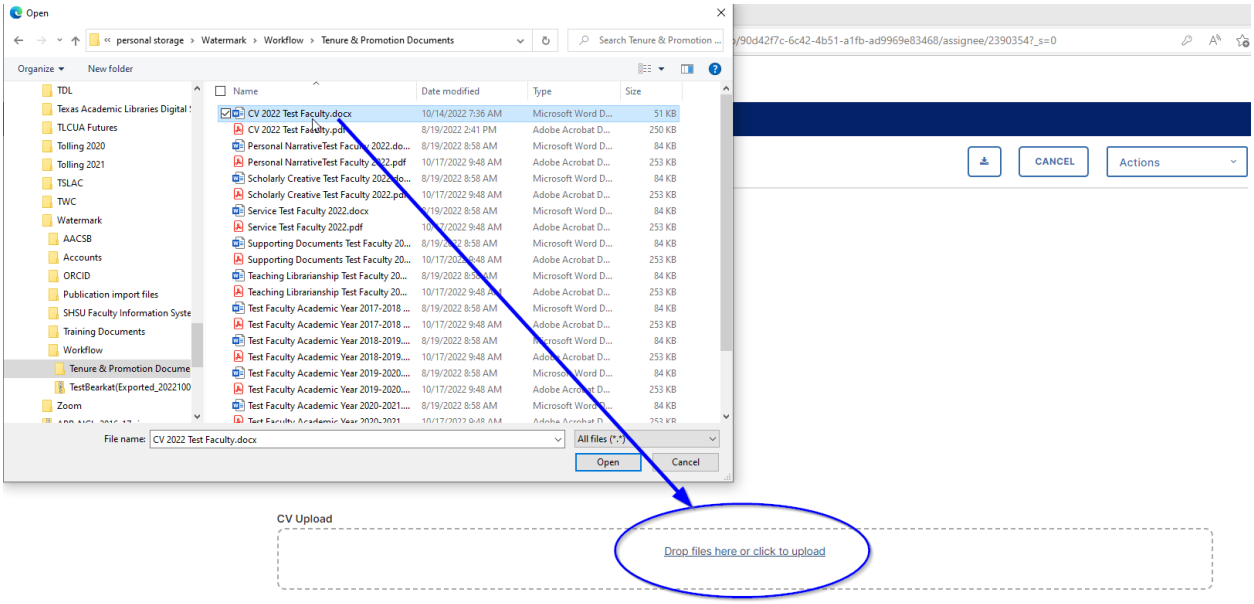
1. Click on Post-Tenure Review to begin entering your portfolio.



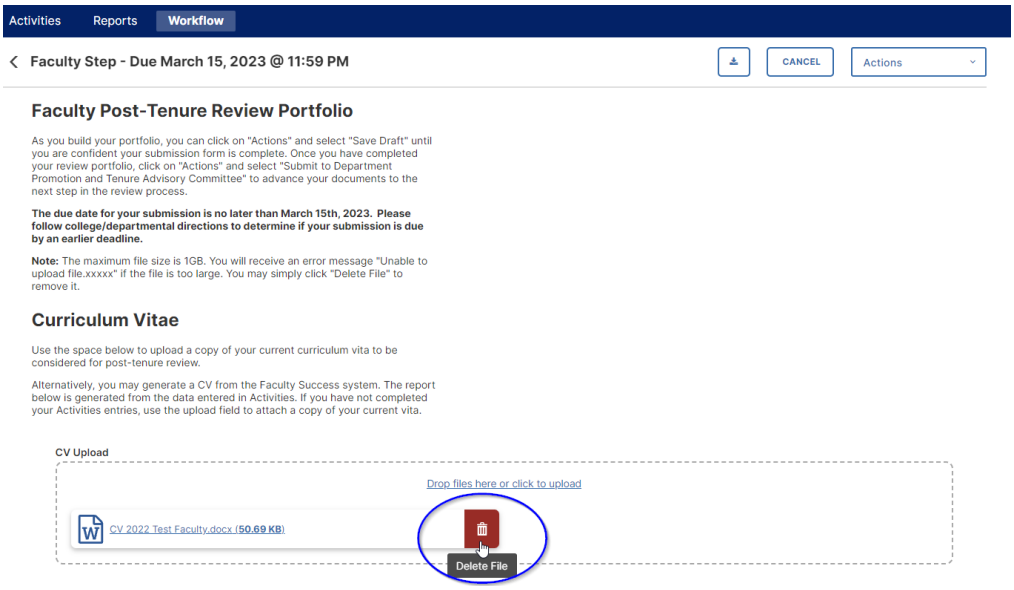
2. Faculty Post-Tenure Review Portfolio screen provides an area for uploading a current CV – or an automated CV can be provided based upon your Activities entries in Watermark.



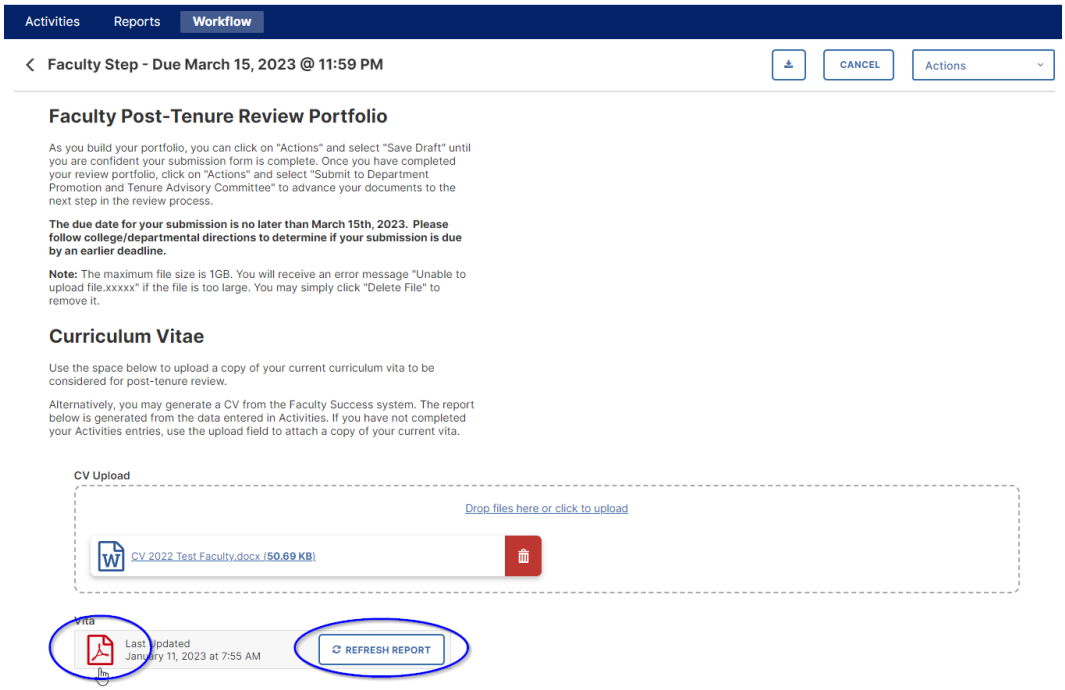
3. You may upload or drag and drop files in the CV Upload area – any file type can be used.



4. You can delete any files you have uploaded by mistake by clicking the trash can icon to the right of the file name.

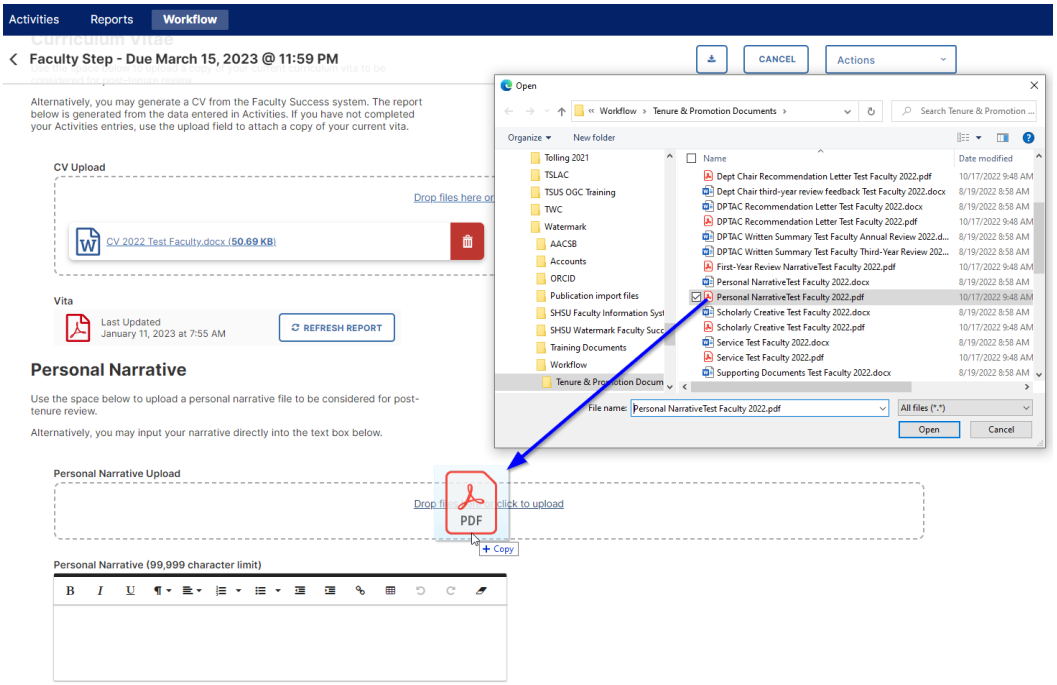


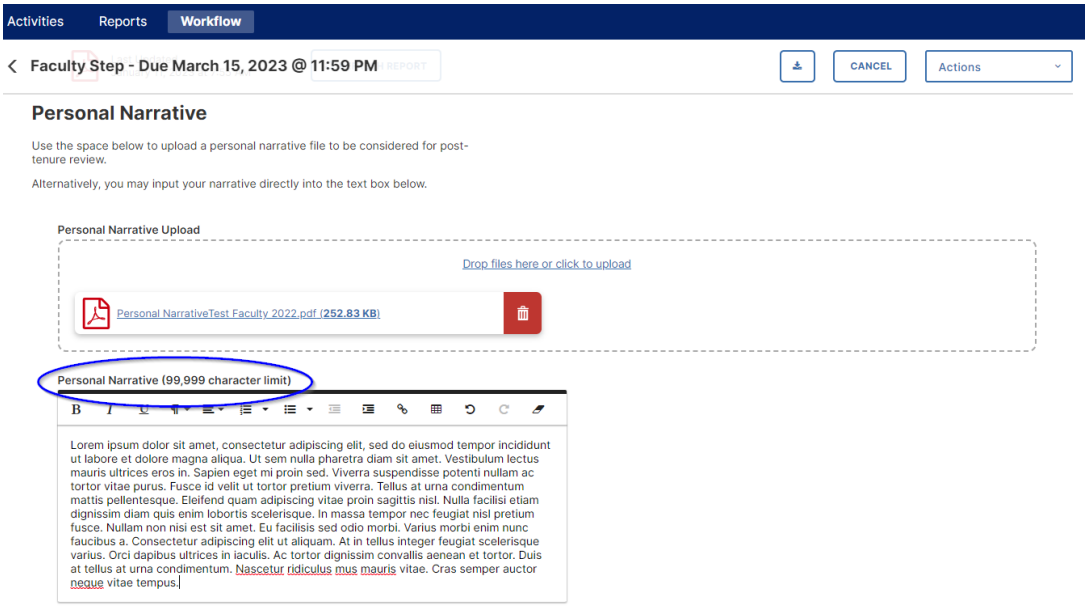
5. An alternative to uploading a CV is the Vita report feature of Watermark. This Vita is automatically generated by Watermark based on your entries in the Activities module of Watermark. You can view this automated CV by clicking on the Adobe Acrobat icon. If you make changes to your Activities Entries after starting a portfolio submission, but prior to submitting, you can update the auto generated CV by clicking the Refresh Report button.



6. The next section of the Post-Tenure Review Portfolio is a section for including a Personal Narrative. This is an optional step, and can be done either by uploading a file to the

Personal Narrative Upload location, **OR** manually enter / cut and paste a narrative directly into the Text Box provided. The Text Box has a limited of just under 100,000 characters.

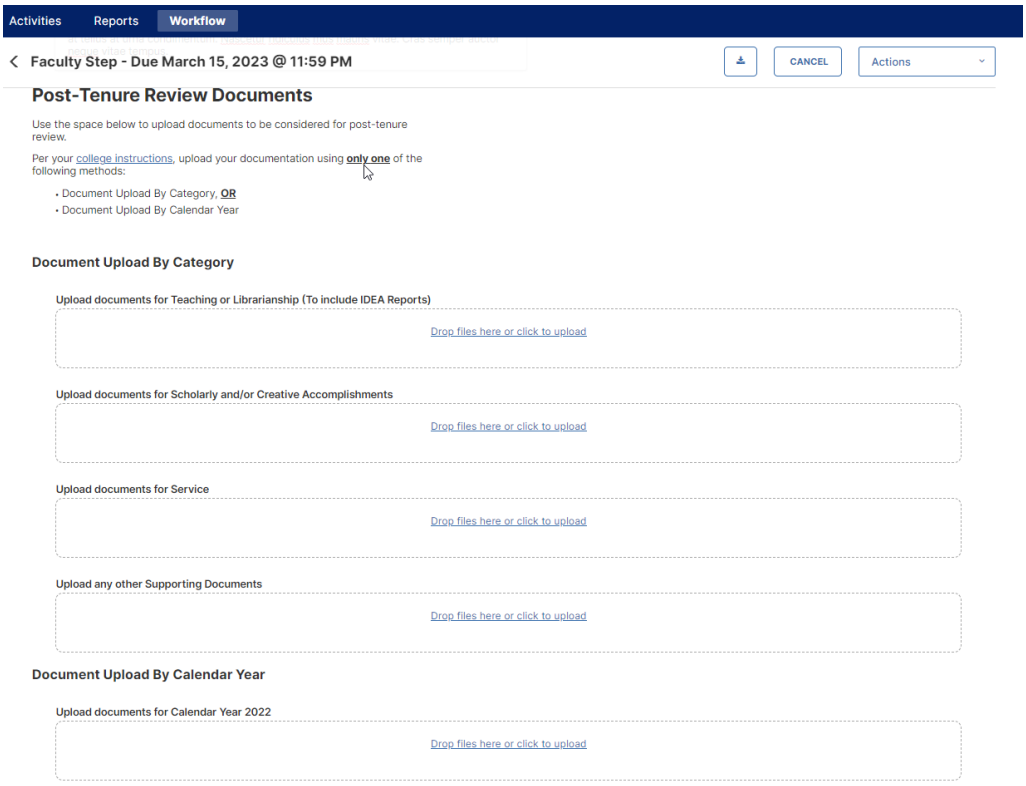




7. The next section of the Faculty Step is the Post-Tenure Review Documents area. This section provides two options for uploading supporting documents for the faculty's portfolio:

    - Document Upload by Category, **OR**
    - Document Upload by Calendar Year

    Per your college instructions, upload your documentation using **only one** of the following methods.

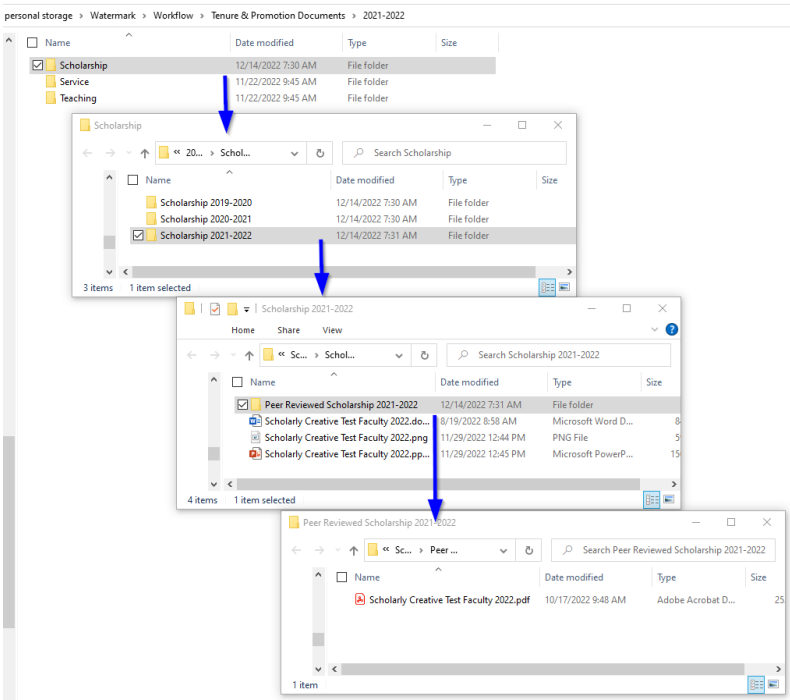


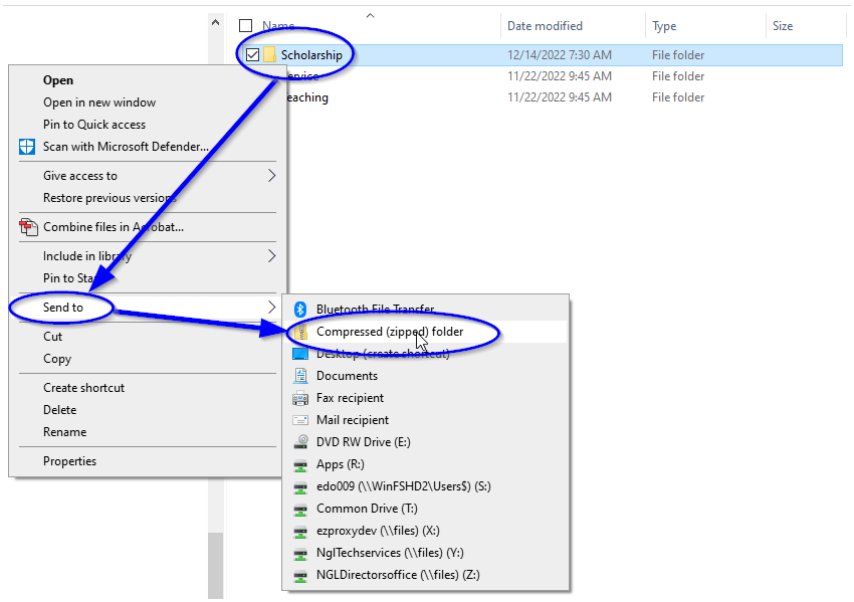
Note: Your materials will be displayed to reviewers exactly as they appear on your faculty submission page. Files uploaded within each of the upload fields will appear in two columns, moving from left to right, then top to bottom.

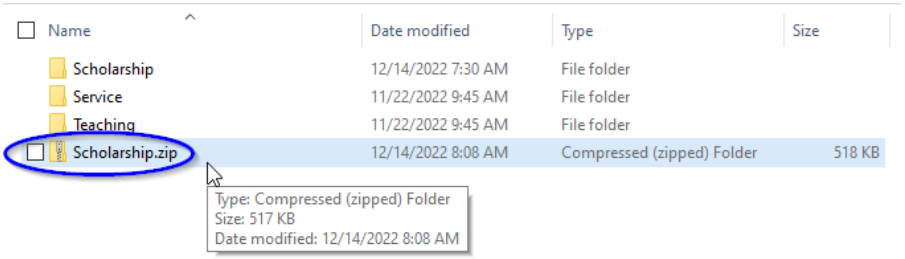
If you wish to provide files appearing in folders and subfolders, you are encouraged to save these files and structure using a Zip file. To create a Zip file containing the desired folder structure, you may right click (on a PC) on the top-level folder and select Send to -> Compressed (zipped) folder. The resulting zip file will be named as the top-level folder.zip. On a Mac you will Control-click on the top-level folder and then choose Compress from the shortcut menu. The resulting zip file will be named Archive.zip (which can, and should, be renamed.)

In the following example (on a PC), the Scholarship folder (which for illustration purposes contains 3 levels of subfolders and files) is being zipped into a single file

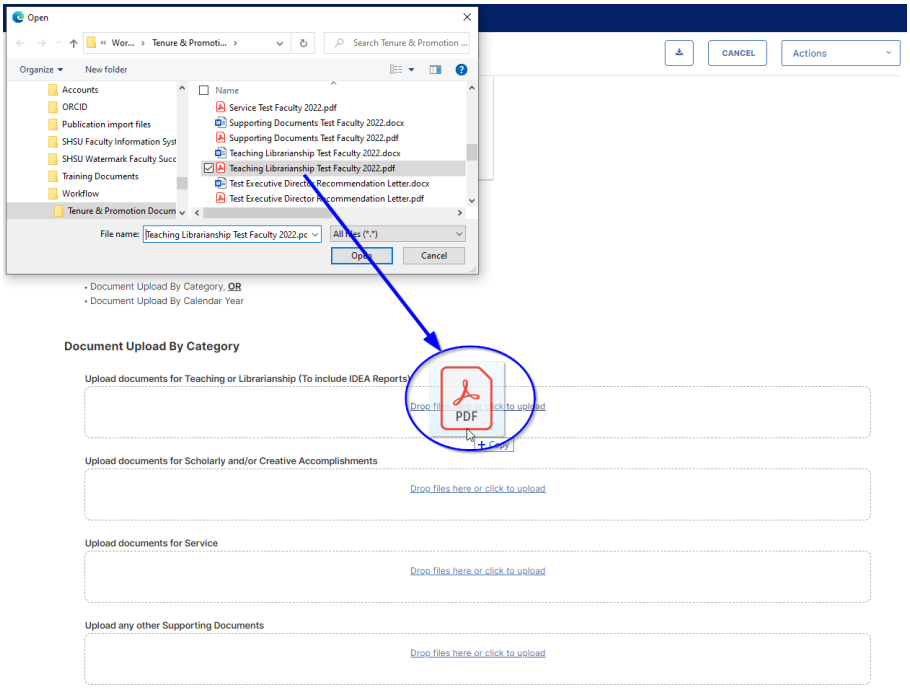
named Scholarship.zip. That resulting zip file will retain the folder structure when the zip file is subsequently opened.



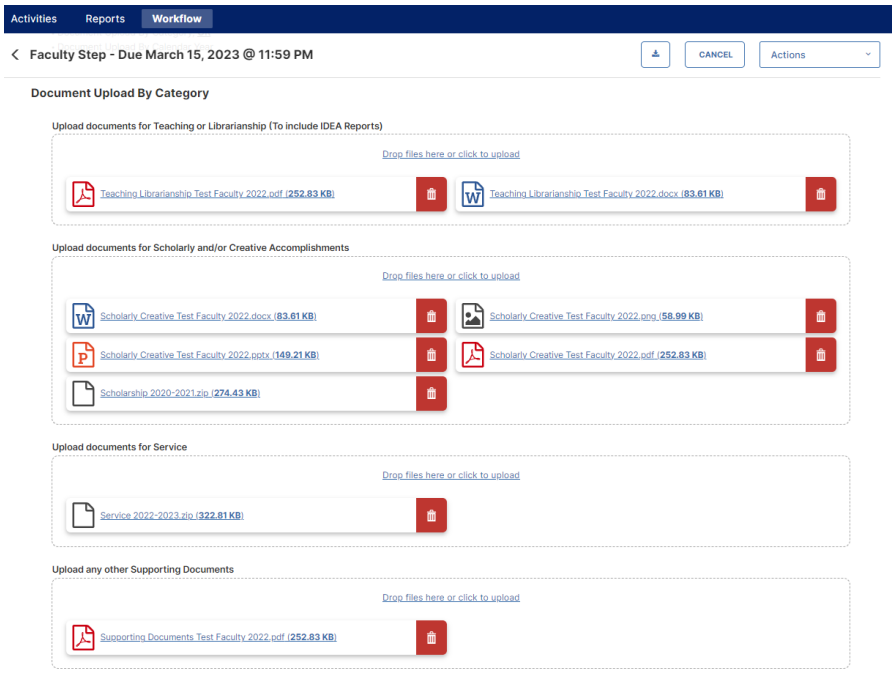




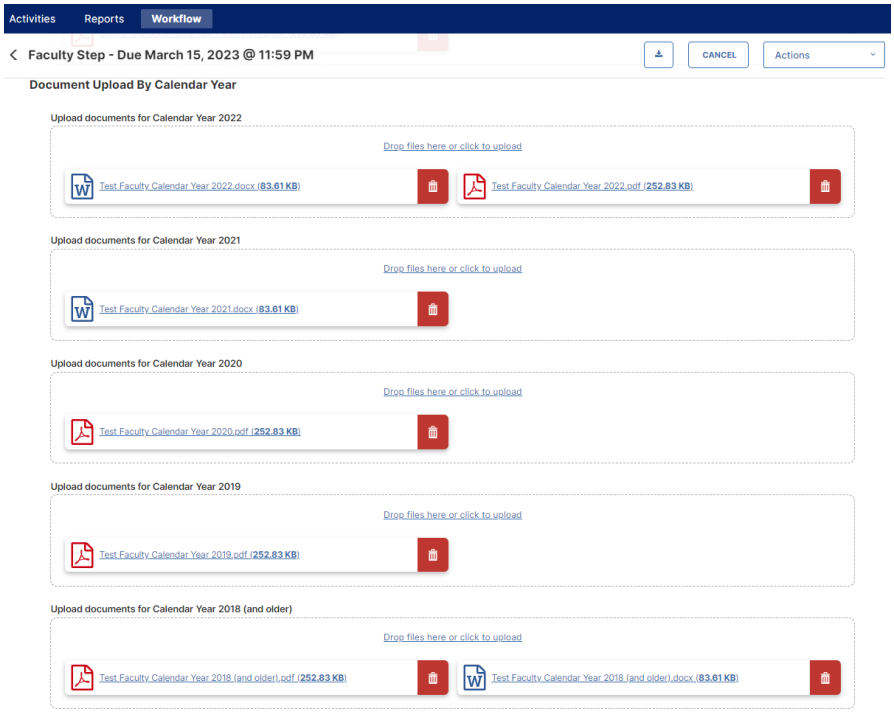
8. Document Uploads by either Category or Calendar Year can be completed by clicking/drag & drop files to the appropriate location.



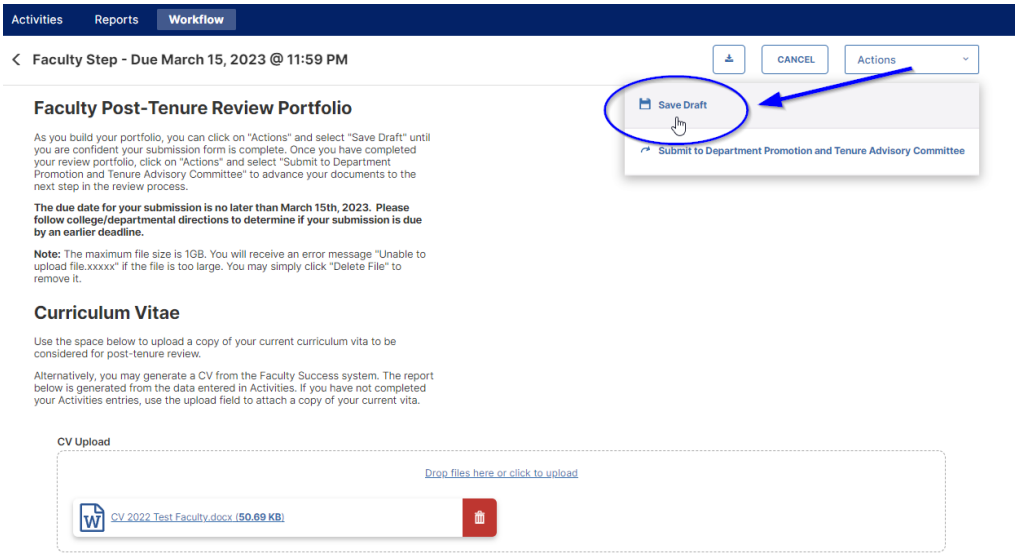
9. For faculty choosing to upload documents by Category, there will be four areas for files: Documents for Teaching or Librarianship, Documents for Scholarly/Creative Accomplishments, Documents for Service, and Other Supporting Documents.



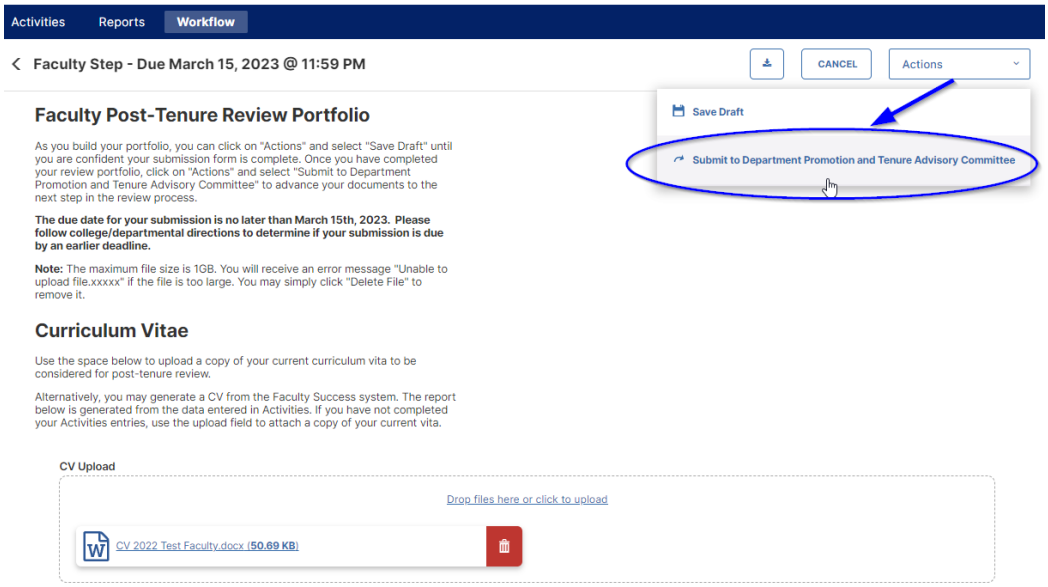
10. For faculty choosing to upload documents by Calendar Year, there will be five areas for files: Calendar Year 2022, Calendar Year 2021, Calendar Year 2020, Calendar Year 2019, Calendar Year 2018 (and older).

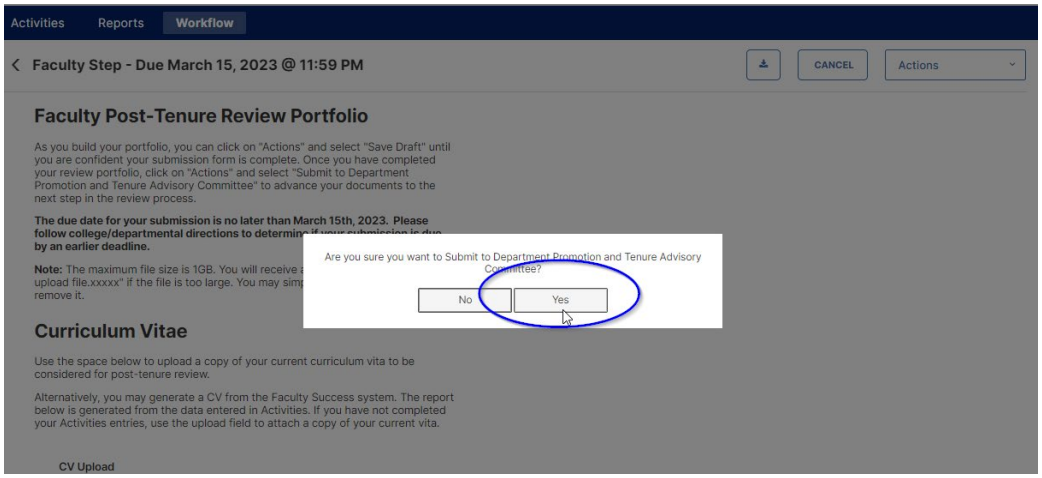


11. Faculty can click on Actions in the upper right and choose Save Draft, to retain any entries and file uploads they have done, but prior to a final submission to Start Portfolio Evaluation.



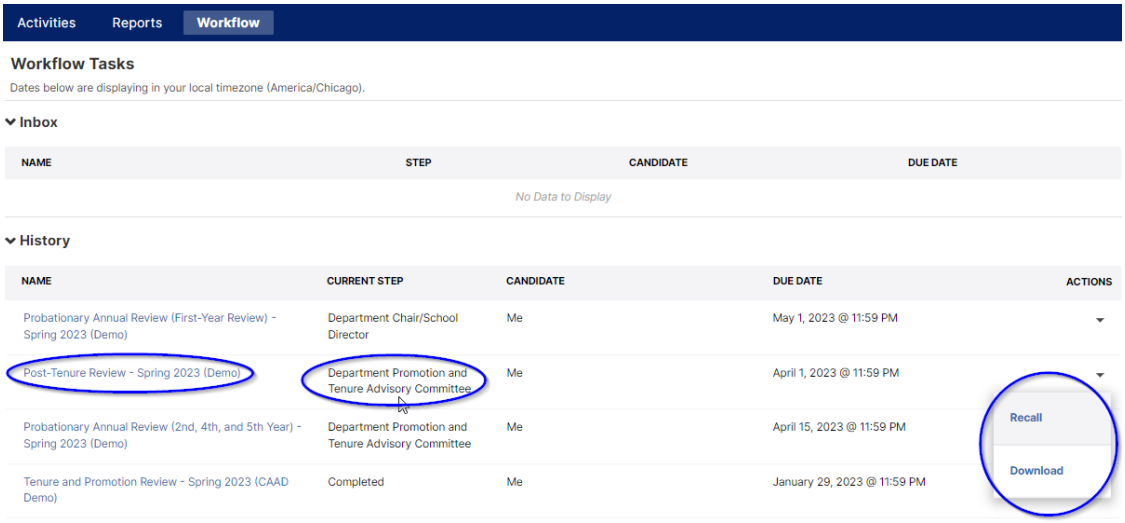
12. Once a faculty member has completed all of their entries and uploads for the Faculty Step, click on the Actions – Submit to Start Portfolio Evaluation and click Yes in the following popup window.





13. The Faculty Workflow Tasks screen will now show the item has moved from the Inbox to History. This screen also shows at what step of the process the submission currently resides. The Due Date shows when the next step must be completed. The Actions down arrow allows the faculty member to Recall or Download the submission. If the due date of the faculty member's submission step has not yet passed, the faculty

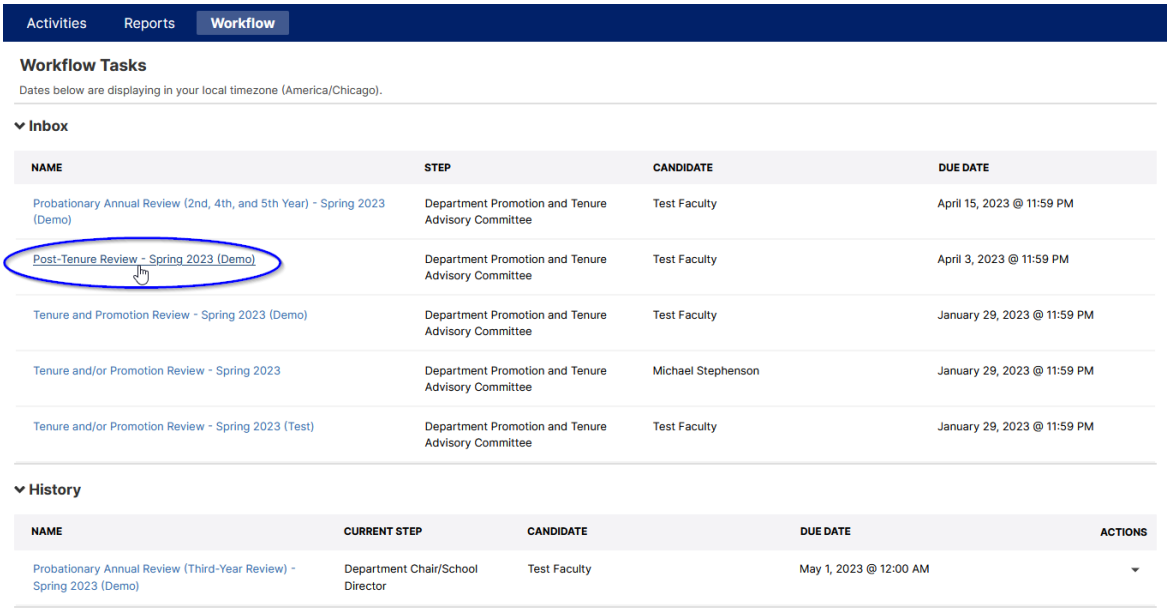
member may recall the submission to make edits and/or add/remove documents, and then resubmit. Once the Current Step moves multiple steps beyond the user's assigned step the Recall function (while still appearing) will no longer work.



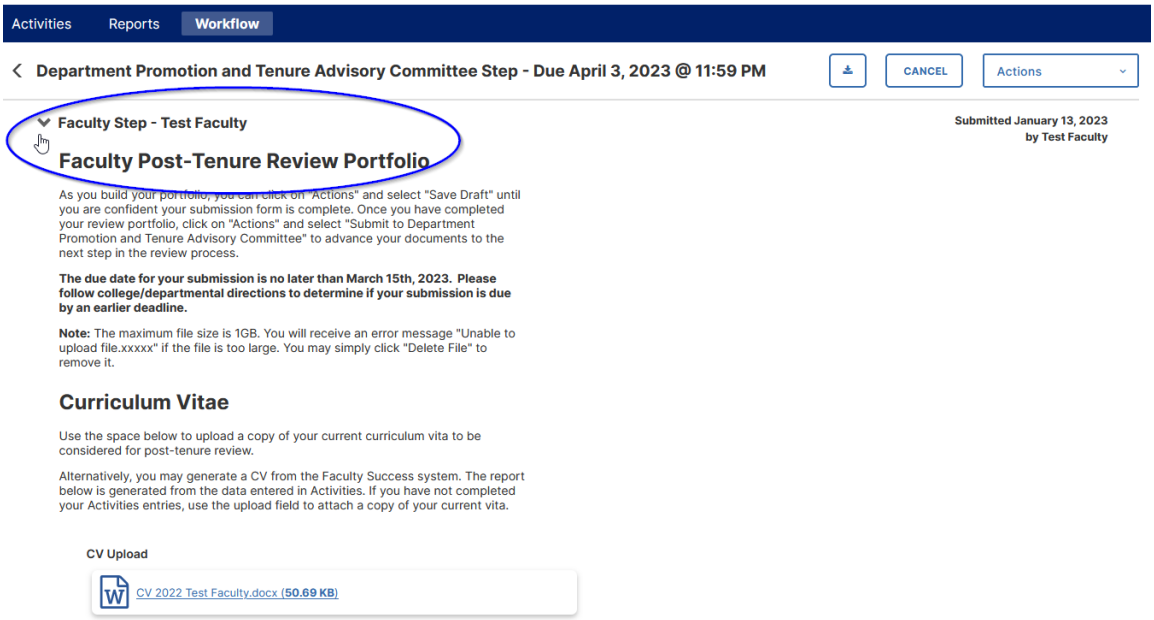
As the portfolio moves through the steps the faculty member can track its progress with the Workflow Tasks History, and view any submitted information they have permission to see from all steps completed prior to the Current Step.

Department Promotion and Tenure Advisory Committee Member/Chair Step

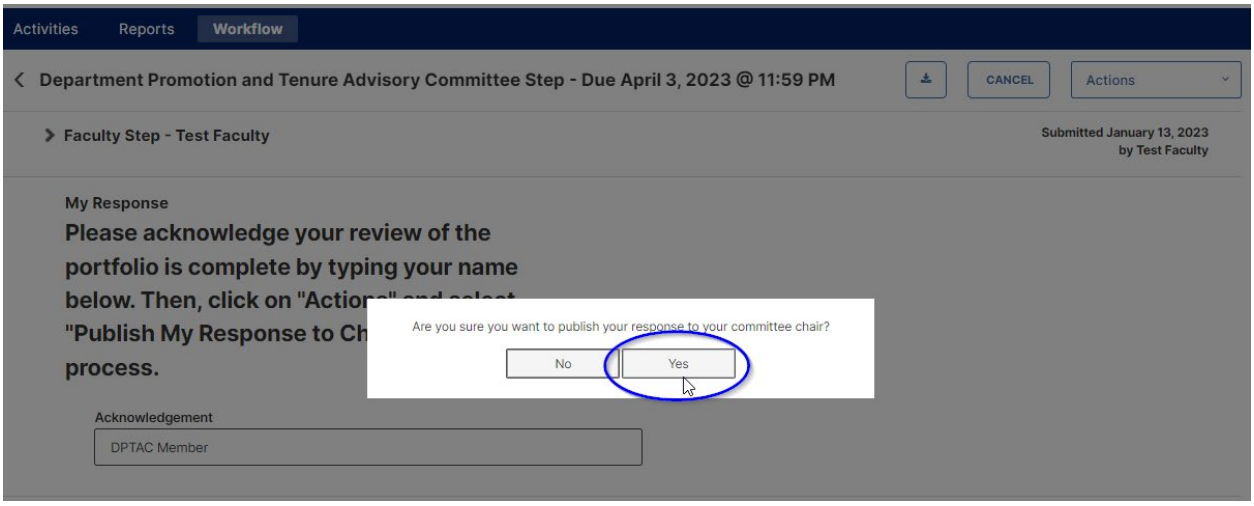
1. Beginning in the Workflow Tasks Inbox click on the Post-Tenure Review entries.



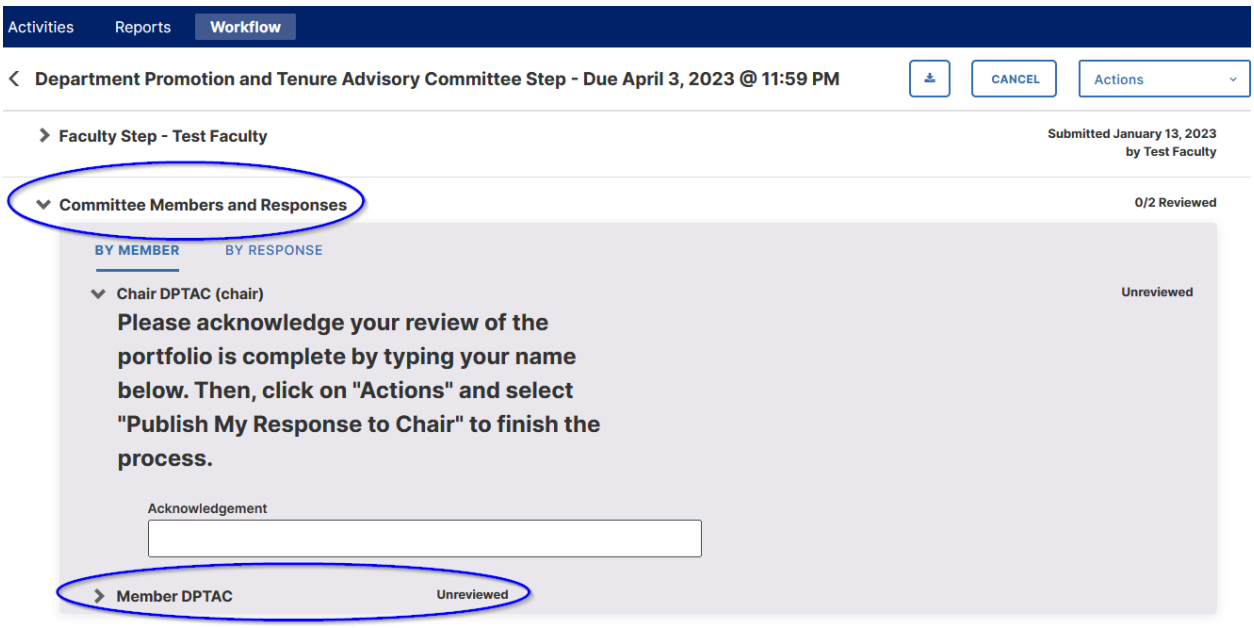
2. For both DPTAC members and the DPTAC chair – the first section of this step will contain the Faculty's Review Portfolio, with all entries and links to uploaded files.

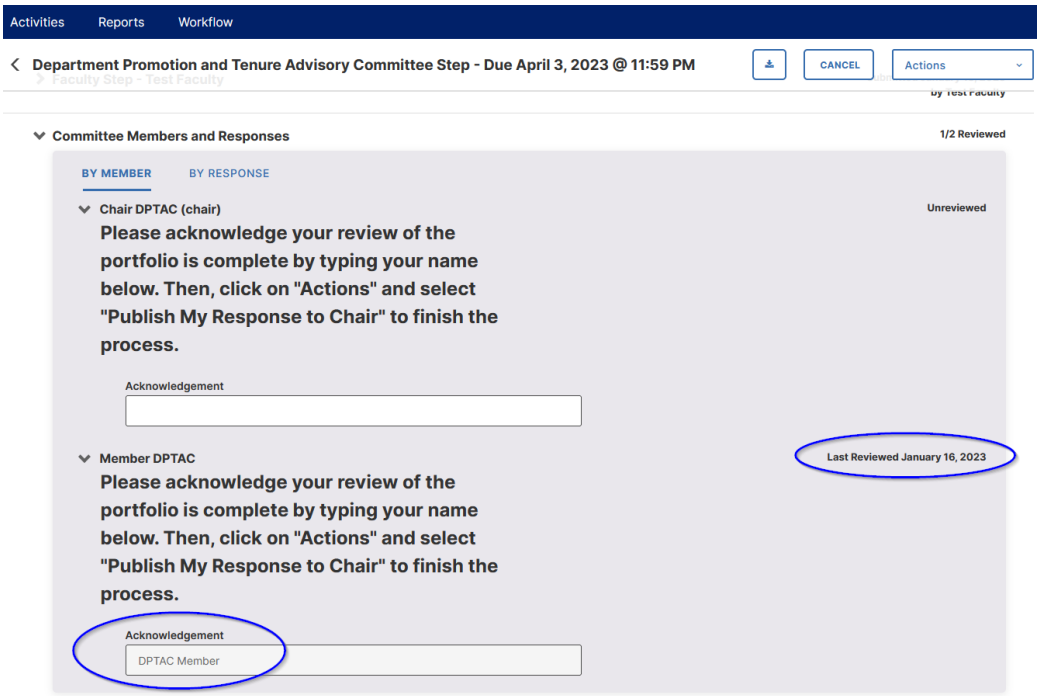


3. The next area of the screen will differ for DPTAC members vs DPTAC chair. DPTAC members will see a single Text Box asking them to type their name after they have reviewed the faculty portfolio and then select the Actions -> Publish their Response to Chair and click Yes in the pop-up window to complete their portion of the process.

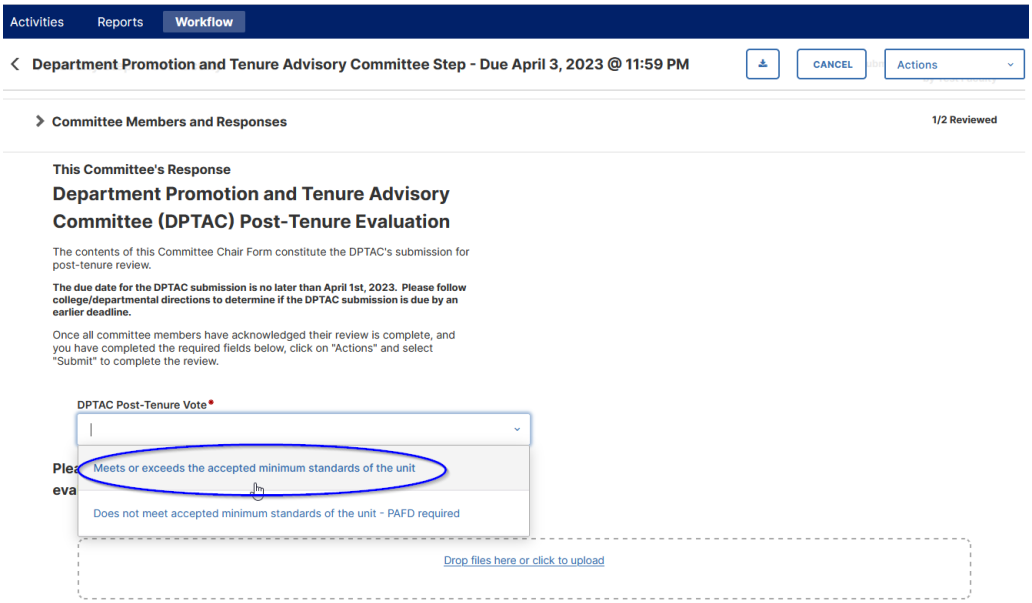


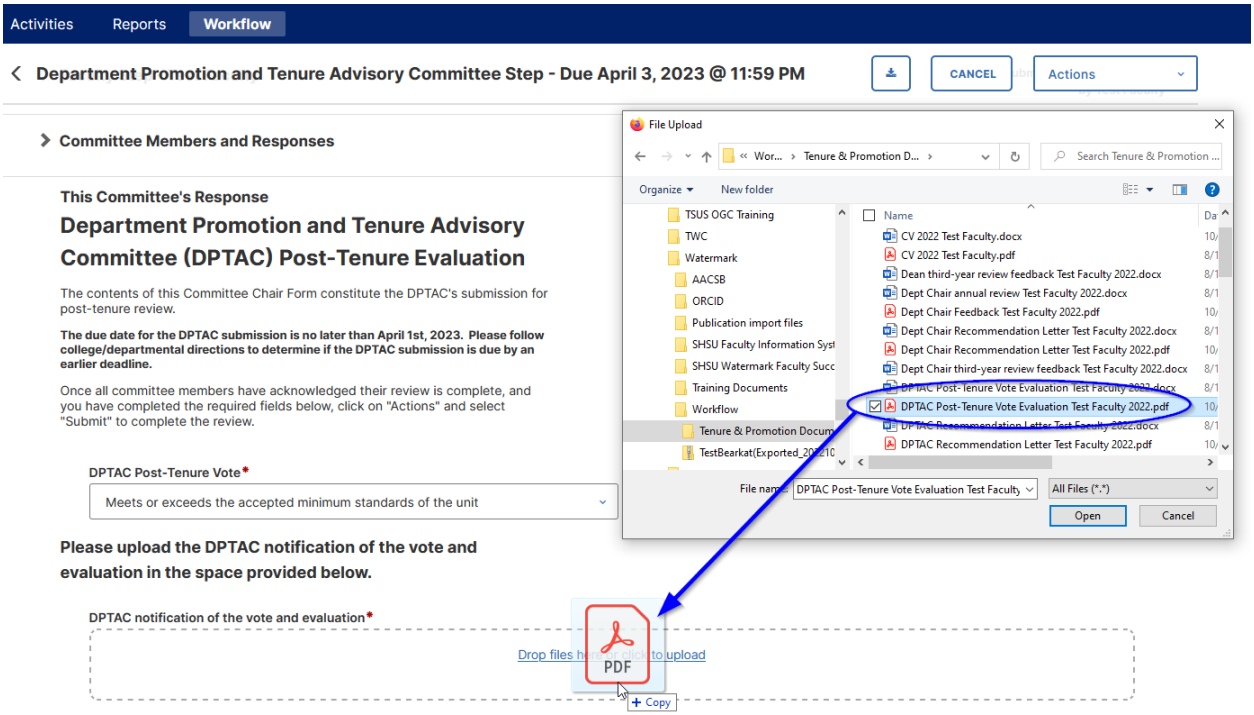
4. For the DPTAC Chair, after the Faculty Review Portfolio section you will see a Committee Members and Responses section. This will include an Acknowledgement Text Box for the chair, and each DPTAC member. The DPTAC member area shows whether or not they have completed their review of the portfolio and published their Acknowledgement Response.



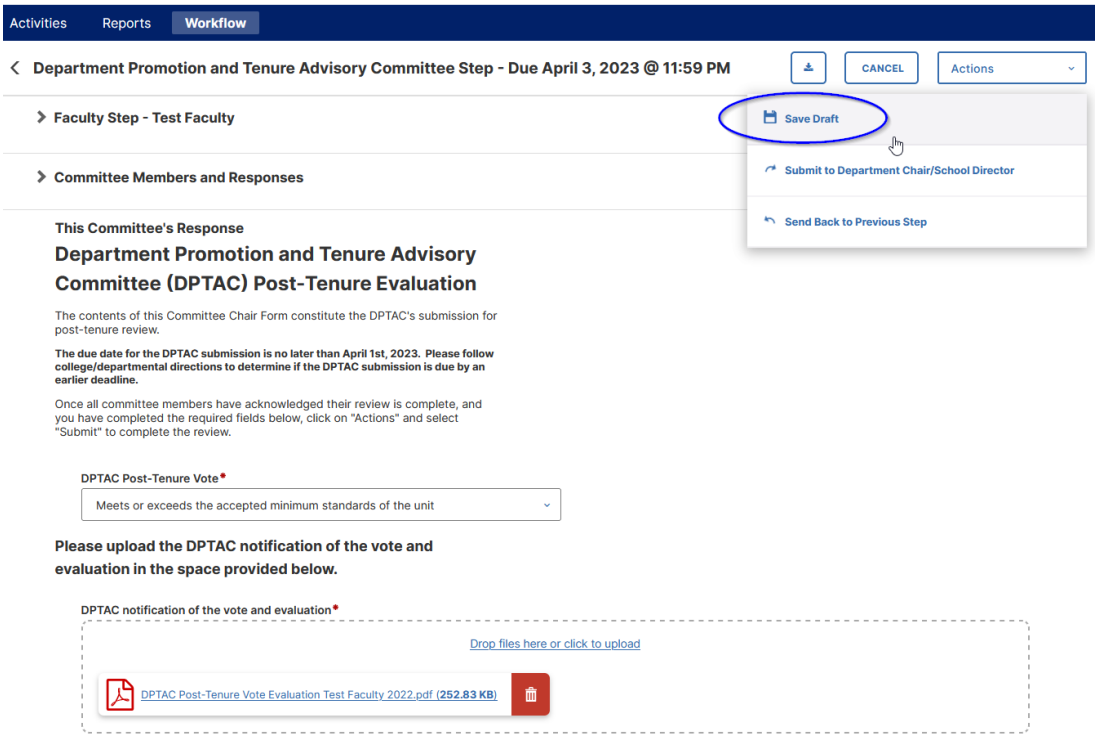


5. The remaining section of the DPTAC chair screen contains the Committee's Response entries that will be submitted to the Department Chair/School Director including a Post-Tenure vote on the candidate's performance with regards to the department's accepted minimum standards, and a file upload with the DPTAC's notification of the vote and evaluation. Both of these fields are required.

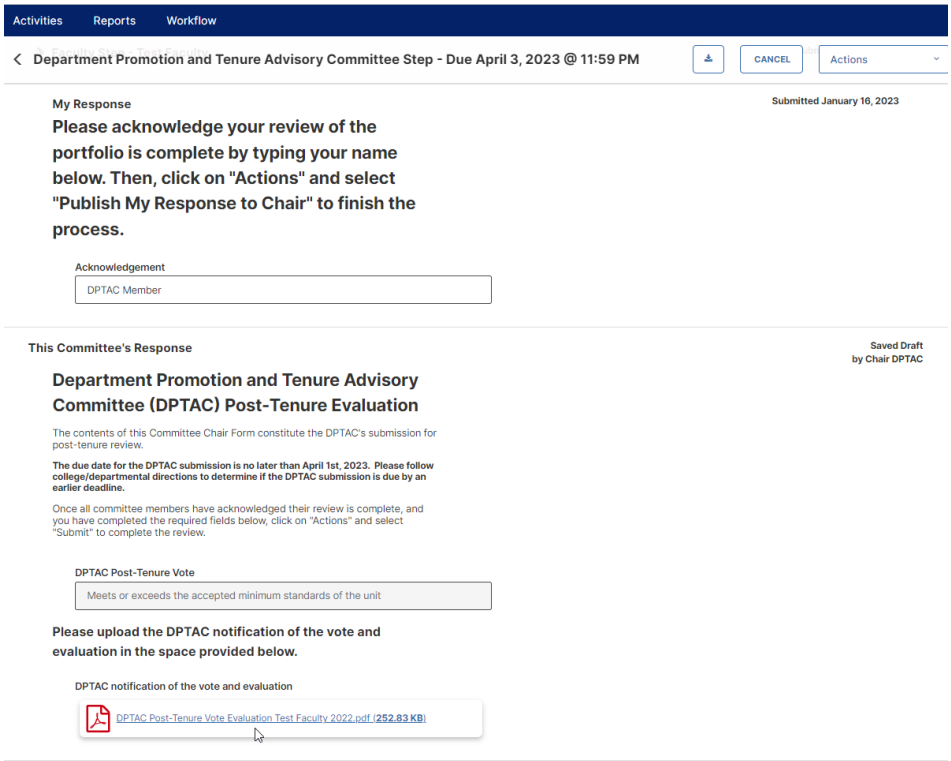




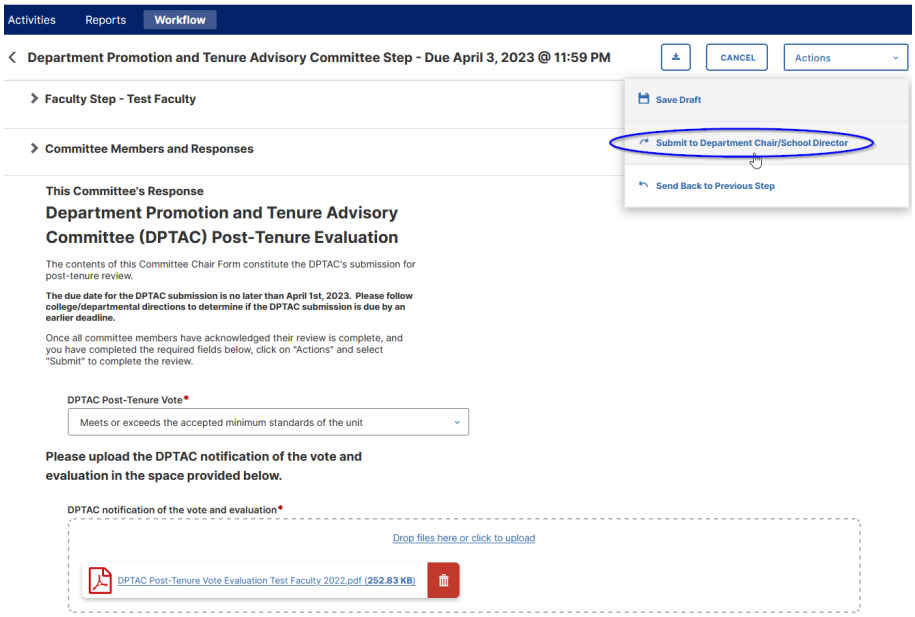
6. The DPTAC chair may choose the Save Draft option from the Actions drop down menu at any time prior to Submitting to the Department Chair. This will also allow DPTAC Member to review the Committee's Response prior to submission.

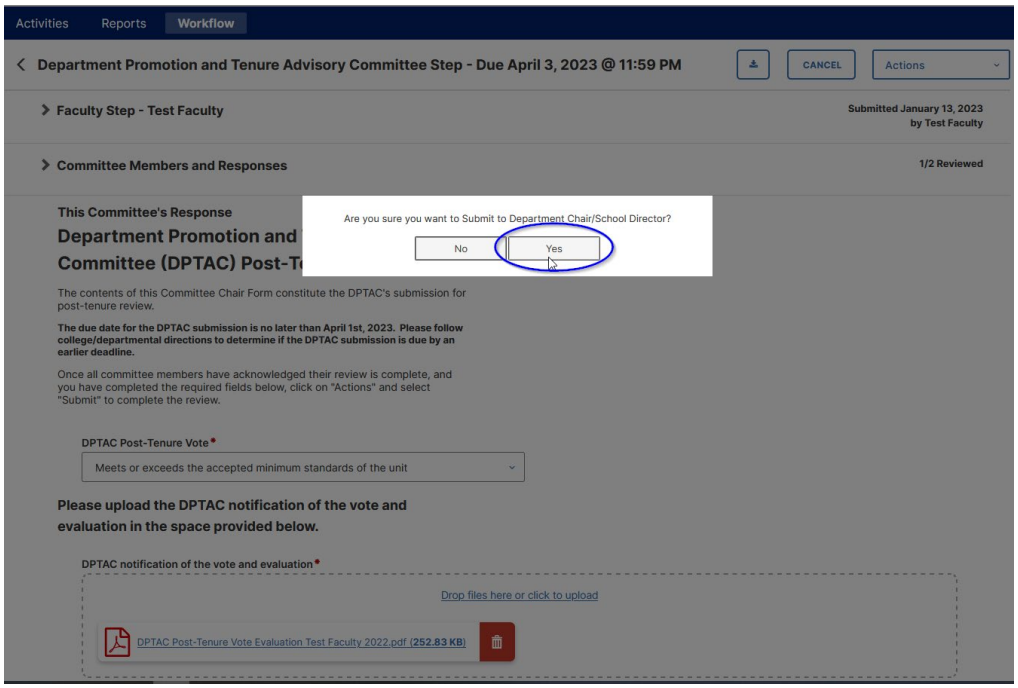


7. DPTAC members can click on the Workflow Tasks Inbox item to see any drafts saved by the DPTAC chair, which include the Recommendations and Vote Tallies as well as access to the DPTAC Recommendation Letter uploaded file.

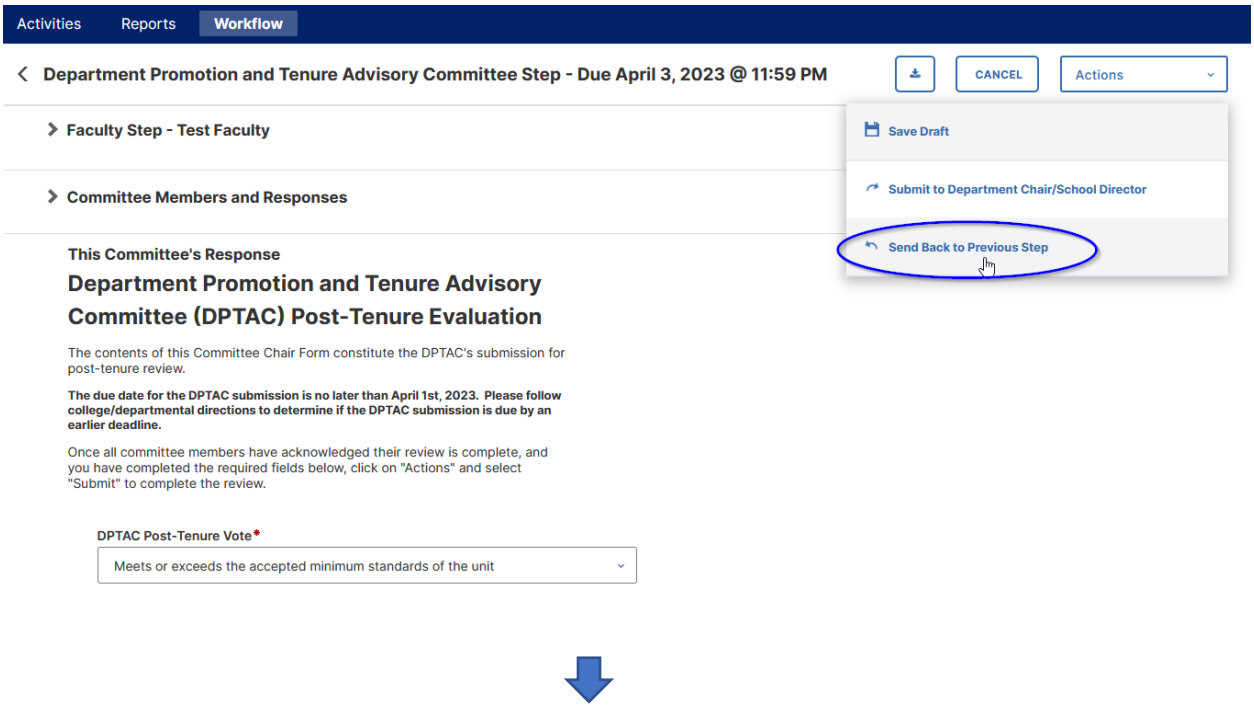


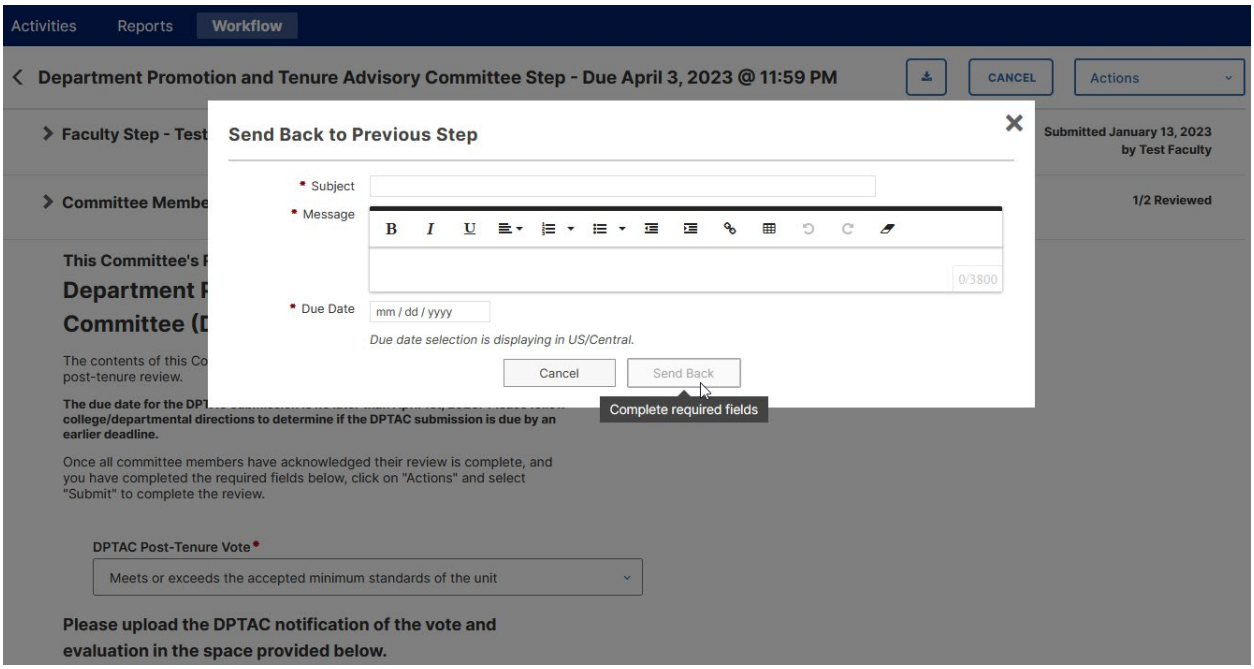
8. Once the DPTAC has conferred and feel the Committee Response is complete, the DPTAC Chair can select from the Actions drop down menu the Submit to Department Chair/School Director option, and click Yes on the following popup box.



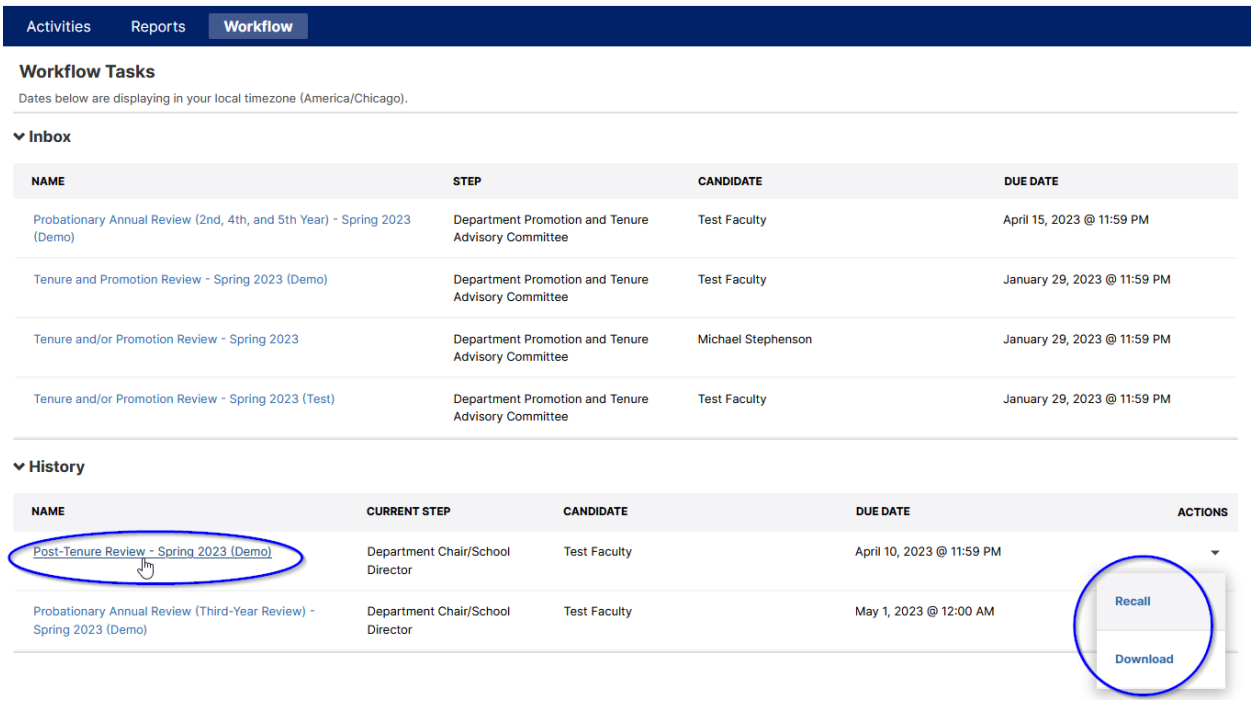


9. The option currently exists for participants in later steps of the Workflow process to Send Back to Previous Step from the Actions drop down menu. Confer with your department chair/school director prior to using this option as it can impact a submission due date.



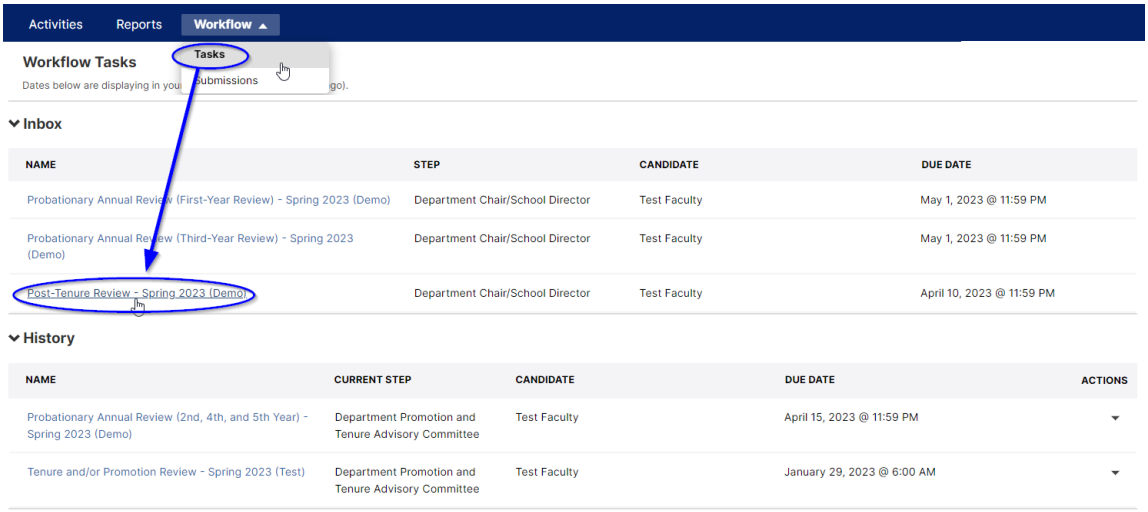


10. Once the DPTAC Chair has submitted the vote and evaluation, members and the chair of the DPTAC will then see that process moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are also available in this step. Please do not Recall a submission after it has passed either the list due date, or any earlier departmental/college due dates for the DPTAC submission.

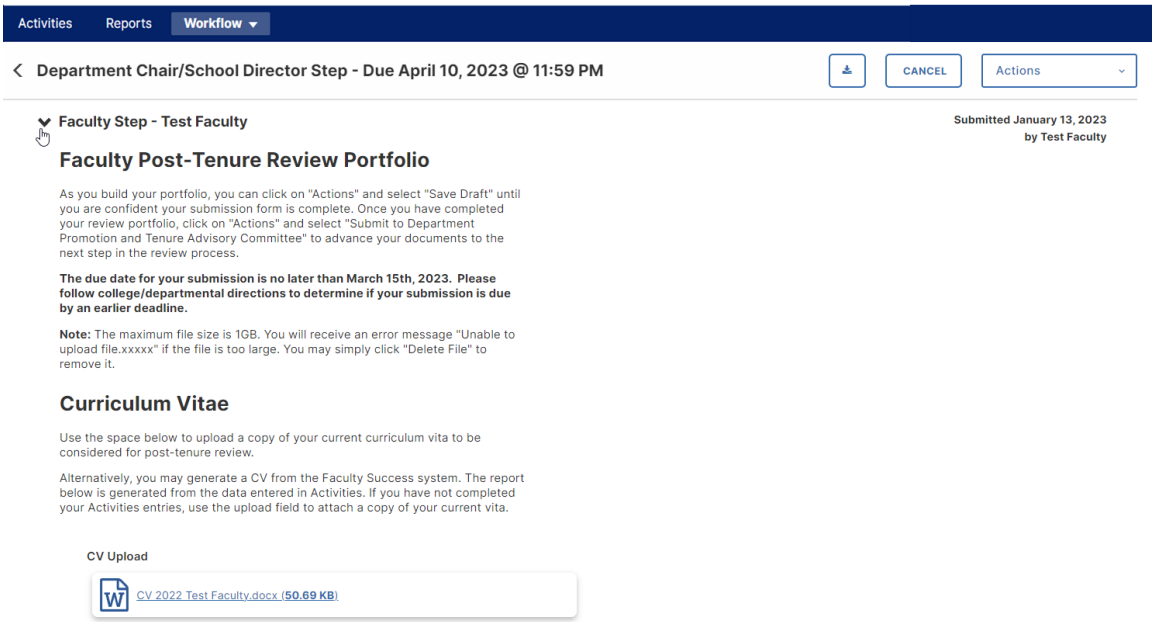


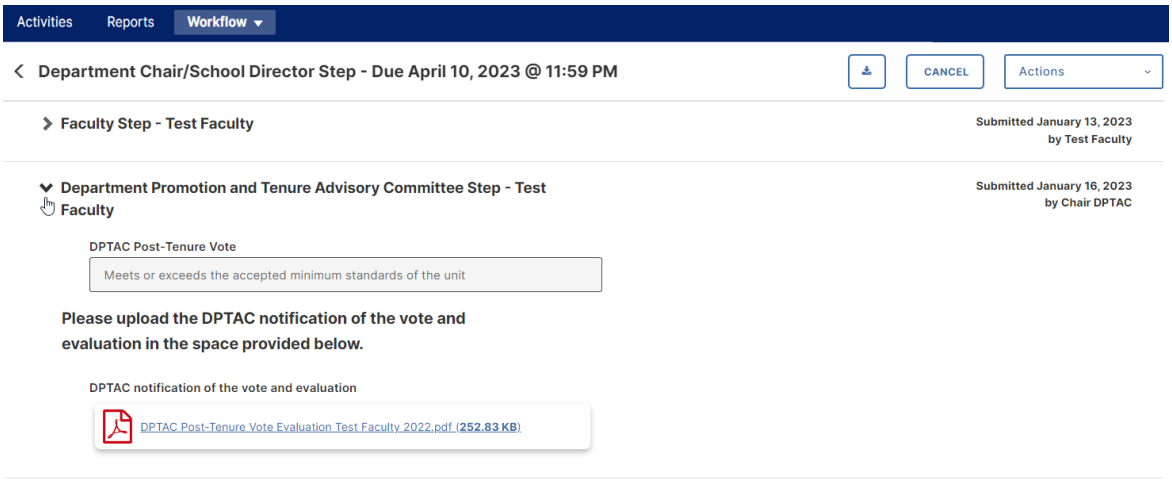
Department Chair/School Director Step

1. Beginning in the Workflow Tasks Inbox click on the Post-Tenure Review entries.

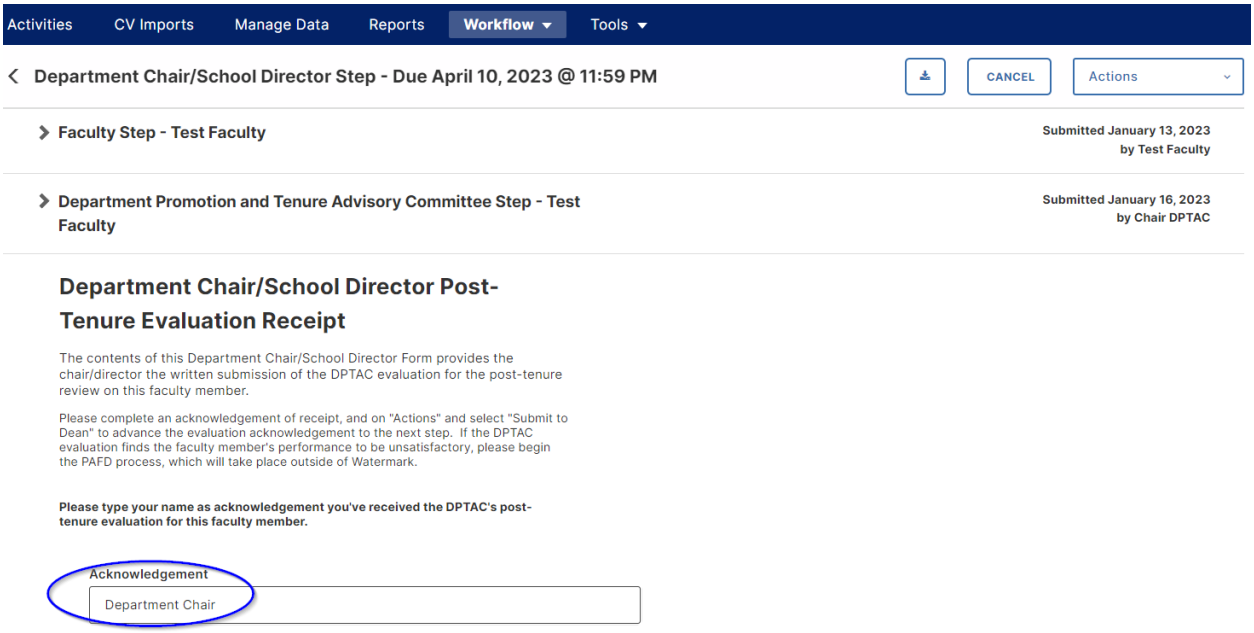


2. In the Department Chair / School Director step the first section will contain the Faculty's Review Portfolio, with all entries and links to uploaded files. The second section will contain all of the DPTAC recommendation votes, tallies, and uploaded letter.

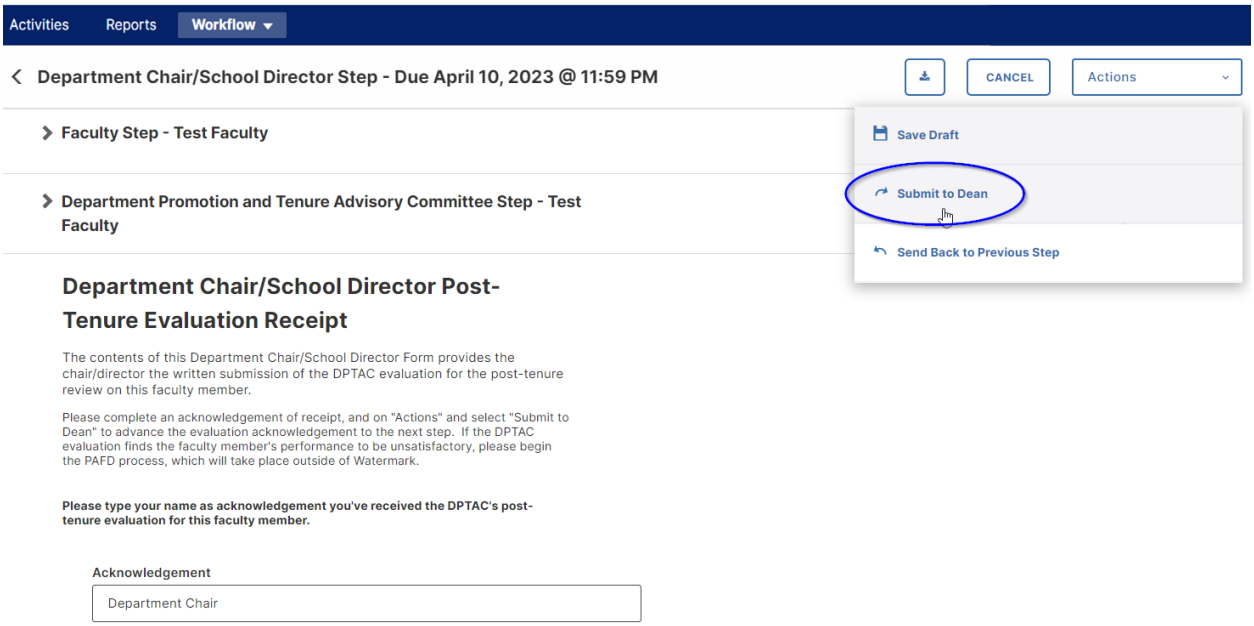


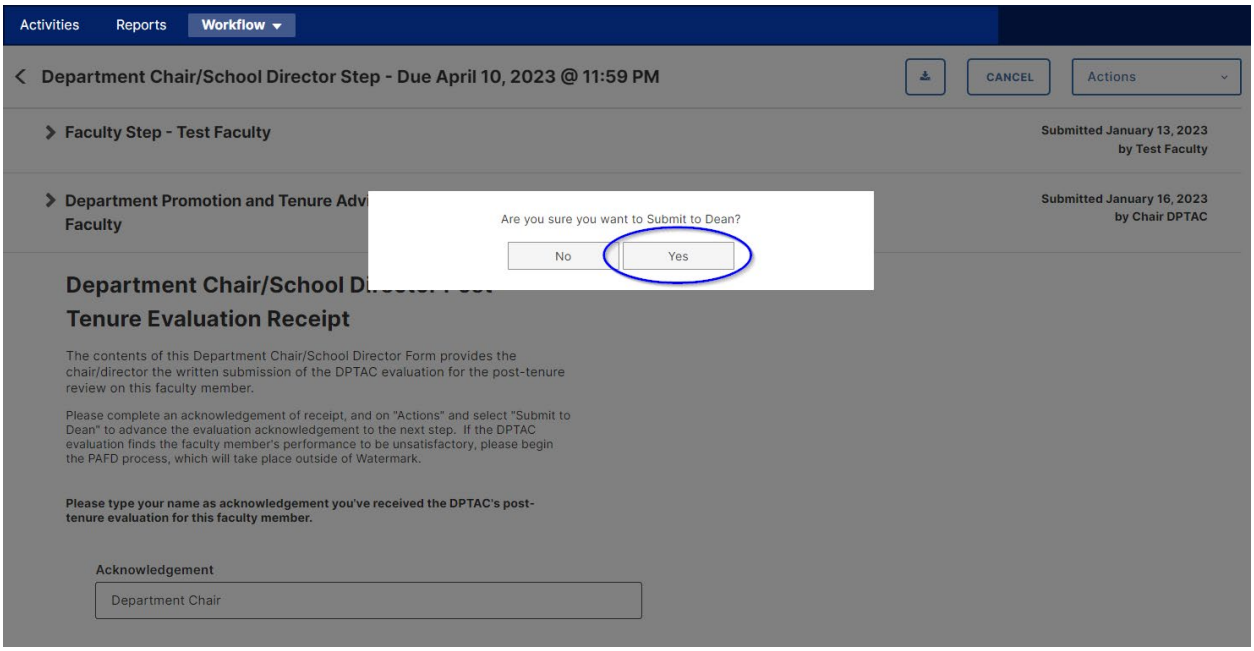


3. The final section for the Department Chair/School Director step contains an optional field for the department chair to acknowledge receipt of the DPTAC's vote and evaluation of the candidate. If the DPTAC evaluation finds the faculty member's performance to be unsatisfactory, please begin the PAFD process, which will take place outside of Watermark.



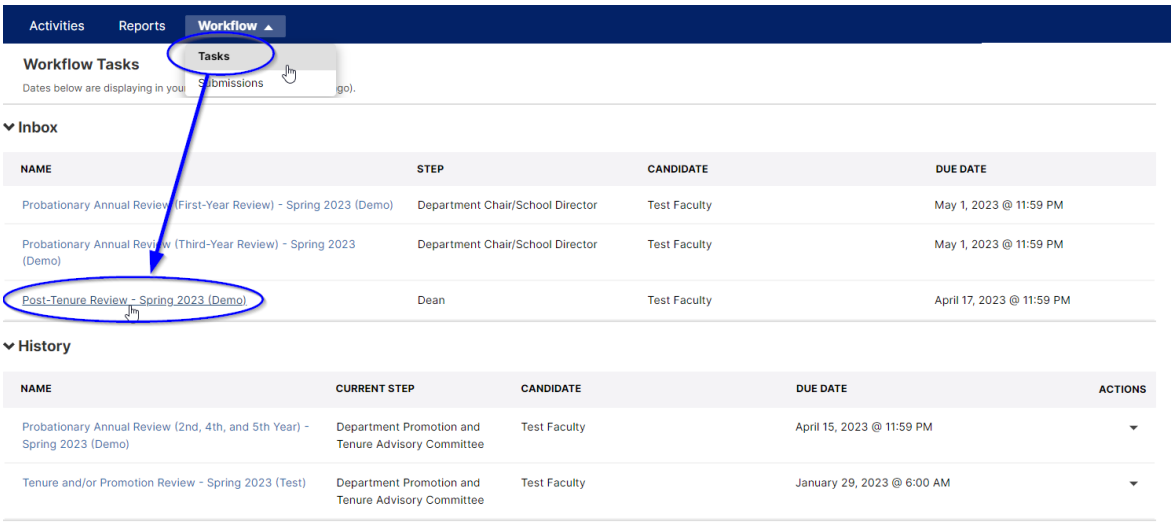
4. Once completed the Department Chair/School Director can select from the Actions drop down menu the Submit to Dean option, and click Yes on the following popup box.



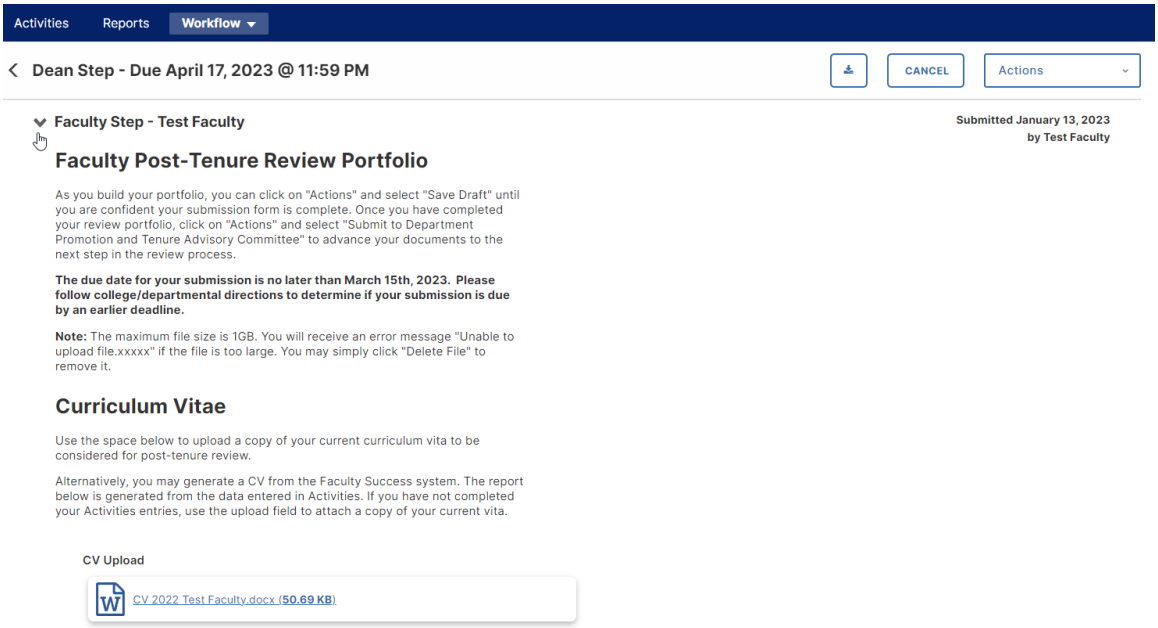


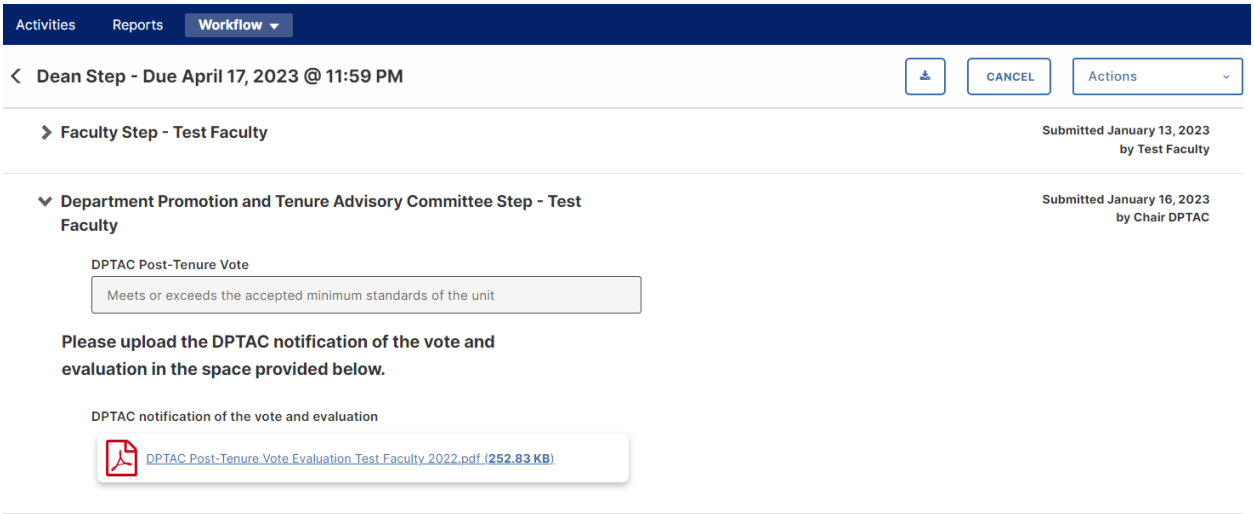
Dean Step

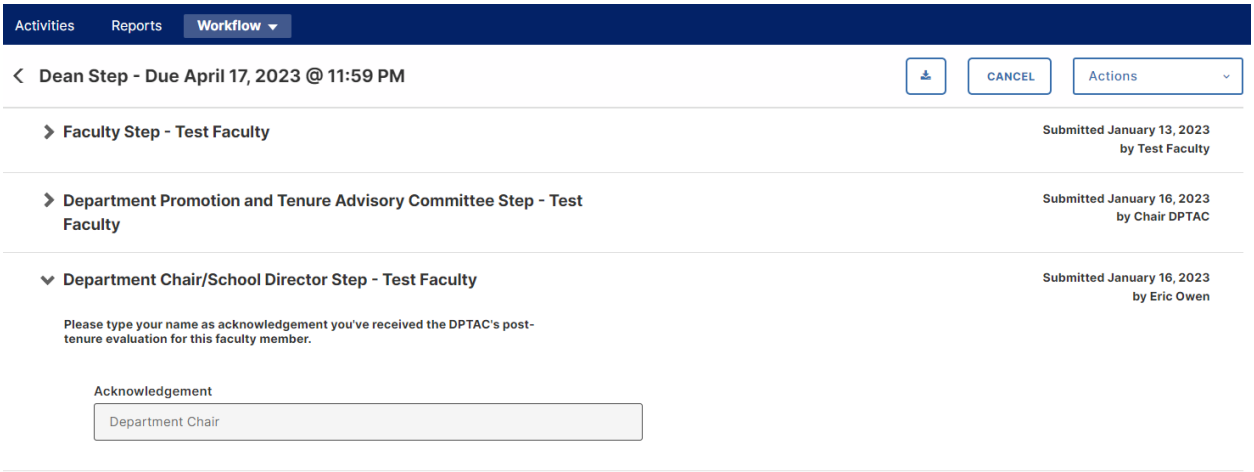
1. Beginning in the Workflow Tasks Inbox click on the Post-Tenure Review entries.



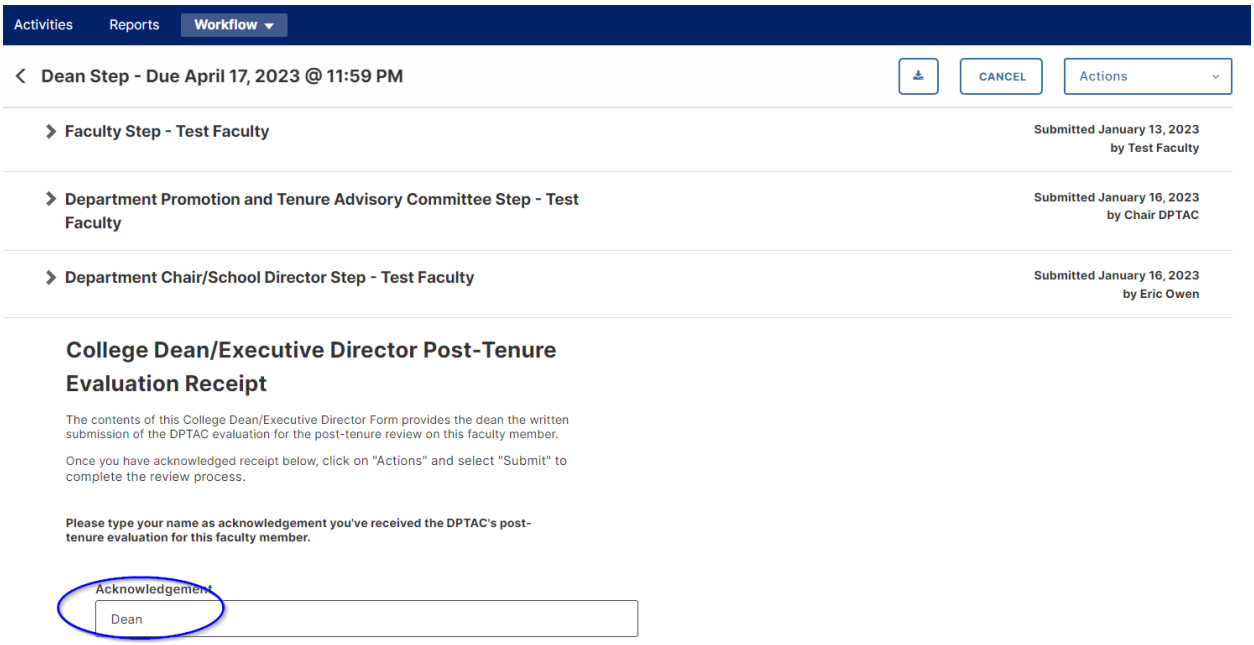
2. In the Dean step, the first section will contain the Faculty's Review Portfolio, with all entries and links to uploaded files. The second section will contain all of the DPTAC recommendation votes, tallies, and uploaded letter. The third section will contain the Department Chair/School Director's acknowledgement.



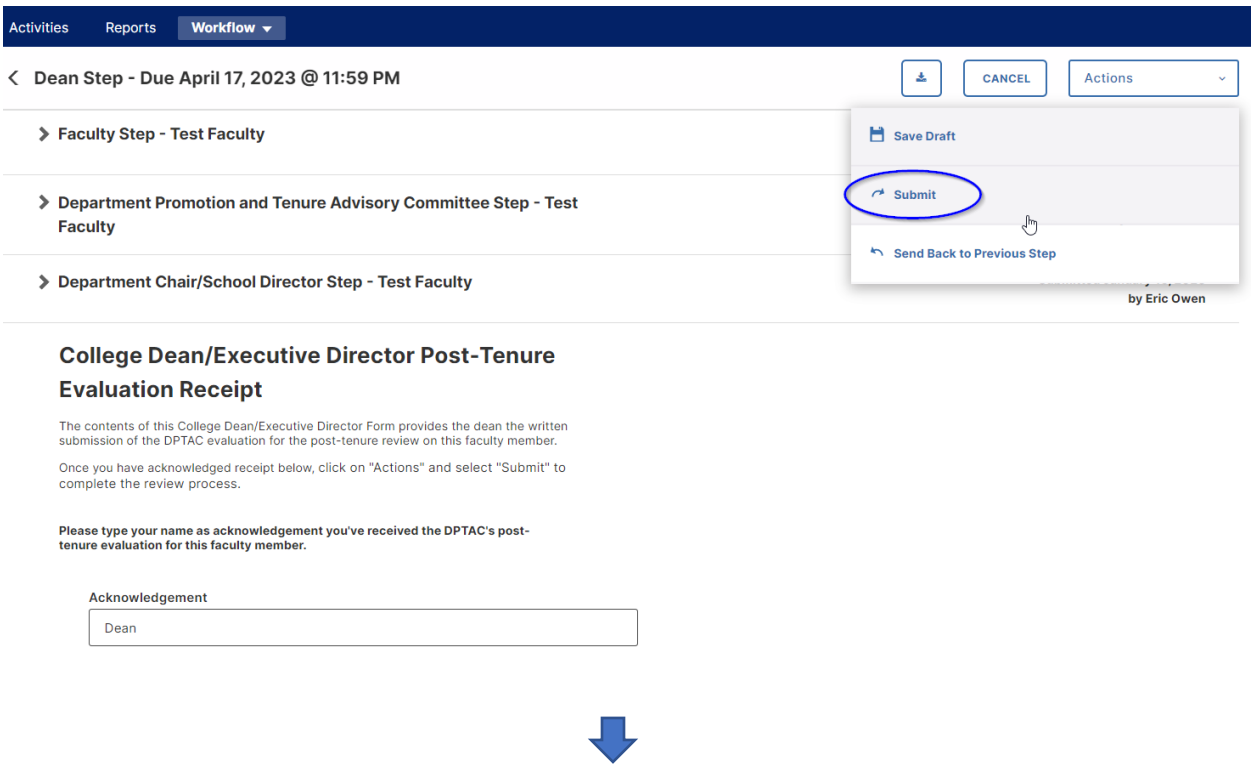


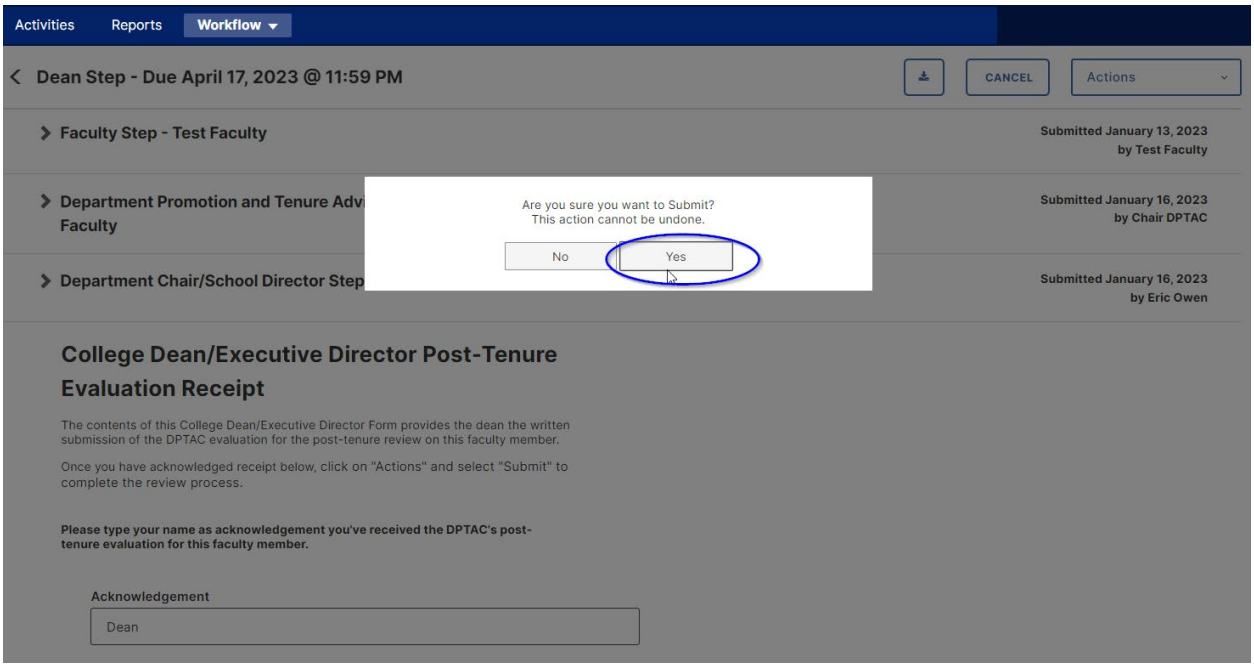


3. The final section for the Dean step contains an optional field for the dean to acknowledge receipt of the DPTAC's vote and evaluation of the candidate. If the DPTAC evaluation finds the faculty member's performance to be unsatisfactory, the Department Chair has been advised to begin the PAFD process, which will take place outside of Watermark.



4. Once acknowledged, the Dean can select from the Actions drop down menu Submit to complete the evaluation and click Yes on the following popup box.




Activities
Reports
Workflow
Dean Step - Due April 17, 2023 @ 11:59 PM
CANCEL
Actions
Faculty Step - Test Faculty
Submitted January 13, 2023
by Test Faculty
Department Promotion and Tenure Adv
Faculty
Submitted January 16, 2023
by Chair DPTAC
Department Chair/School Director Step
Submitted January 16, 2023
by Eric Owen
Are you sure you want to Submit?
This action cannot be undone.
No
Yes
College Dean/Executive Director Post-Tenure Evaluation Receipt
The contents of this College Dean/Executive Director Form provides the dean the written submission of the DPTAC evaluation for the post-tenure review on this faculty member.
Once you have acknowledged receipt below, click on "Actions" and select "Submit" to complete the review process.
Please type your name as acknowledgement you've received the DPTAC's post-tenure evaluation for this faculty member.
Acknowledgement
Dean