SHSU Watermark Workflow
Annual Review – Probationary Faculty 2\textsuperscript{nd}, 4\textsuperscript{th}, and 5\textsuperscript{th} Year Help Guide

Watermark Workflow for Annual Reviews of probationary faculty in the 2\textsuperscript{nd}, 4\textsuperscript{th}, and 5\textsuperscript{th} years follows the multistep process illustrated in the flowchart below. Beginning at the Faculty submission step, the review portfolio is then sent on to the Department Promotion and Tenure Advisory Committee. The portfolio then moves to the final administrative review step at the Department Chair/School Director.

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:** Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
- **Due Date:** Monday, February 6, 2023 11:59 PM CST

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 900417, probationary 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 February 6th, 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/6d495f48-f639-4f50-82d3-f33fef9780a0/step/9bfe3a1b-3751-41f4-a705-18af6bb77dbf/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 materials to Start a Portfolio Evaluation, the Faculty Records office will validate the submission and move it to the next step in Watermark Workflow where DPTAC members and the DPTAC chair will receive an automated email:
Dear Member DPTAC,

The following submission is now ready for your review:

Process: Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Saturday, April 15, 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 900417, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. 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 both the candidate and department chair/school director’s review. The due date for your submission is no later than April 15th, 2023. Please follow college/departamental 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:


Dear Chair DPTAC,

The following submission is now ready for your review:

Process: Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Saturday, April 15, 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 900417, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. 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 both the candidate and department chair/school director’s review. The due date for your submission is no later than April 15th, 2023. Please follow college/departamental 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:


The final step will be the Department Chair/School Director. Once the DPTAC chair submits the DPTAC written summary for a 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:** Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023
(Demo)

**Candidate:** Test Faculty

**Due Date:** Monday, May 1, 2023 11:59 PM CDT

In accordance with APS 900417, the department chair/school director shall review the performance of probationary faculty members beginning with the first year of employment. 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 department chair/school director for both the candidate and the dean/executive director’s review. The due date for your submission is no later than May 1st, 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:


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 [link](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 2\textsuperscript{nd}, 4\textsuperscript{th}, and 5\textsuperscript{th} Year Annual Review Process Steps

Faculty Step

1. Click on Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 Review to begin entering your portfolio.

2. Annual Review Portfolio screen provides area for uploading a current CV – or an automated CV can be provided based upon your activity's 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’ve 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 Activity module of Watermark. You can view this automated CV by clicking on the Adobe Acrobat icon. If you make changes to your Activity 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 Annual Review Portfolio is a section for including an Annual Review Narrative. This is an optional step, and can be done either by uploading a file to the Annual Review 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 Annual Review Portfolio Documents area. This section provides two options for uploading supporting documents for the faculty’s portfolio:

- Document Upload by Category, OR
- Document Upload by Academic 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 them 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 Academic Year can be completed by clicking/drag & drop files in 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 Academic Year, there will be five areas for files: Academic Year 2022-2023, Academic Year 2021-2022, Academic Year 2020-2021, Academic Year 2019-2020, Academic Year 2018-2019 (and older). Faculty should only upload documents that pertain to their current review (2\textsuperscript{nd}, 4\textsuperscript{th}, or 5\textsuperscript{th}) which can vary depending upon service credit or tolled years.
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 Department Promotion and Tenure Advisory Committee 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 Tenure and/or Promotion Review entries.

2. For both DPTAC members and the DPTAC chair – the first section of this step will contain the Faculty’s Annual 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 Annual 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 DPTAC’s written summary that will be submitted as a file upload to the Department Chair/School Director.
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 to access the DPTAC Written Summary uploaded file.
8. Once the DPTAC has conferred and feel the committee’s written summary 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 Written Summary members and 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 Tenure and/or Promotion Review entries.

2. In the Department Chair/School Director step the first section will contain the faculty’s Annual Review Portfolio, with all entries and links to uploaded files. The second section will contain the DPTAC uploaded written summary.
3. The final section for the Department Chair/School Director step contains the required file upload containing the department chair’s annual review for the probationary faculty member.
4. Once the review is completed, the Department Chair/School Director can select from the Actions drop-down menu the Submit option, and click Yes on the following popup box, to complete the annual review of that probationary faculty member.
Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM

Faculty Step - Test Faculty

Department Promotion and Tenure Advisory Committee Step - Test Faculty

Submitted December 19, 2022 by Test Faculty

Submitted December 19, 2022 by ChairDPTAC

Department Chair/School Director Review Recommendation

The contents of this form constitute the Department Chair/School Director’s feedback for the faculty member.

Please upload the Department Chair/School Director’s review in the space provided below.

Once you have completed the required fields below, click on “Actions” and select “Submit” to complete the review process.

Department Chair/School Director review

Drop files here or click to upload

[File: Test Chair annual review Test Faculty 2022.docx (83.61 KB)]