SHSU Watermark Workflow
Third-Year Annual Review Process Help Guide

Watermark Workflow for the Third-Year (straw poll) Annual Review follows 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. The portfolio then moves the administrative review steps from the Department Chair/School Director until it reaches the Dean.

![Flowchart](image)

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 (Third-Year Review) - 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:*


The Next step with faculty involvement will be the Departmental Promotion and Tenure Advisory Committee (DPTAC) step. Once a faculty member submits their materials, the DPTAC members and the DPTAC chair will receive an automated email:
The following step will be the Department Chair/School Director. Once the DPTAC chair submits the DPTAC preview votes and 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 (Third-Year Review) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Monday, May 1, 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.000417, 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/deparmental 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/a9f358ae-eabb-437e-b9af-1d2fa3d51a33/step/7eaf073e7b-486c-88d4-6643730020a3/assignee/2354062
embed=workflow:assignee,workflow:subject,workflow:response?orgid=1660&personid=2354062

The final step will be the Dean's acknowledgement and optional feedback. Once the Department Chair/School Director has submitted their acknowledgement and optional feedback, the Dean will receive an automated email:

Dear Dean,

The following submission is now ready for your review:

Process: Probationary Annual Review (Third-Year Review) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Monday, May 15, 2023 11:59 PM CDT

In accordance with APS.000417, the dean/executive director shall review the performance of probationary faculty members during the third year of employment. Please reference the training resources located on the Academic Affairs Watermark website for more information.

Review/feedback for each individual candidate is optional and may be uploaded into the Watermark Faculty Success system by the dean/executive director for both the candidate's and the provost's review. Acknowledgment of the third-year review in Watermark is due no later than May 15th, 2023.

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/a9f358ae-eabb-437e-b9af-1d2fa3d51a33/step/03f77041-c9a4-41b1-915c-7945550b7b/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 Third-Year Review Process Steps

**Faculty Step**

1. Click on Probationary Annual Review (Third-Year Review) - Spring 2023 Review to begin entering your portfolio.
2. Faculty 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 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 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 Faculty Review Portfolio is a section for including a Third-Year Narrative. This is an optional step, and can be done either by uploading a file to the Third-Year 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 Third-Year 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.

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<thead>
<tr>
<th>Activities</th>
<th>Reports</th>
<th>Workflow</th>
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<tr>
<td><strong>Document Upload By Category</strong></td>
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<td>Upload documents for Teaching or Librarianship (To include IDEA Reports)</td>
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<td>Upload documents for Scholarly and/or Creative Accomplishments</td>
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10. For faculty choosing to upload documents by Academic Year, there will be three areas for files: Academic Year 2022-2023, Academic Year 2021-2022, Academic Year 2020-2021 (and older).

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<td>Upload documents for Academic Year 2022-2023</td>
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<td>Upload documents for Academic Year 2021-2022</td>
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<td>[Scholarly &amp; Creative] Test Faculty 2021 doc: 834.81 KB</td>
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<td>Upload documents for Academic Year 2020-2021 (and older)</td>
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<td>[Test Faculty] Academic Year 2020 doc: 834.81 KB</td>
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<td>[Scholarly &amp; Creative] Test Faculty 2020 doc: 834.81 KB</td>
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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.
As an example, here is the faculty view of the DPTAC and Department Chair/School Director submissions once the History Current Step has reached the Dean.
Department Promotion and Tenure Advisory Committee Member/Chair Step


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.
Please acknowledge your review of the portfolio is complete by typing your name below. Then, click on "Actions" and select "Publish My Response to Chair" to finish the process.

Note: For the DPTAC Chair, the Acknowledgment field and "Publish My Response to Chair" does not apply.

Acknowledgment

Last Reviewed December 19, 2022
5. The remaining section of the DPTAC chair screen contains the Committee Response entries that will be submitted to the Department Chair/School Director including a Preview Vote with tallies, and a file upload with the DPTAC’s written summary. All of these fields are required – please enter a number (including 0) for each of the vote tally fields.
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 uploaded written summary file and vote tallies.

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 Committee Response, 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 – with Recall still being evaluated for implementation.

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 the preview vote tallies and an uploaded file with the DPTAC’s written summary.
3. The final section for the Department Chair/School Director step contains a required acknowledgement field that the department chair/school director has met and discussed the DPTAC review with the third-year probationary faculty member. There is an additional file upload area for optional feedback from the department chair/school director.
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


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 the preview vote tallies and an uploaded file with the DPTAC’s written summary. The third section contains the Department Chair/School Director’s acknowledgement of meeting the probationary faculty member, and potentially a file upload with their optional feedback.
Department Promotion and Tenure Advisory Committee Step - Test Faculty

DPTAC Preview Vote
Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES)
4

DPTAC Preview Tally (NO)
0

DPTAC Preview Tally (ABSTAIN)
0

Please upload the DPTAC written summary in the space provided below.

DPTAC approved written summary

[Link to DPTAC Written Summary: Test Faculty Third-Year Review 2022.docx (83.61 KB)]

Department Chair/School Director Step - Test Faculty

Acknowledgement the Department Chair/School Director has met and discussed DPTAC review with the faculty member.

Department Chair

Upload the Department Chair/School Director's Third-Year (Straw Poll) review/feedback (optional)

Department Chair/School Director Third-Year (Straw Poll) review/feedback (optional)

[Link to Department Chair review: Test Faculty Third-Year Review 2022.docx (83.61 KB)]
3. The final section for the Dean Director step contains a required acknowledgement field that the Dean has received the third-year year review of the probationary faculty member. There is an additional file upload area for optional feedback from the dean.

4. Once the acknowledgement and review are completed, the Dean can select from the Actions drop-down menu the Submit option and click Yes on the following popup box to complete the third-year review of that probationary faculty member.
College Dean/Executive Director
Review (Straw Poll) Acknowledgement

Please acknowledge your receipt of the third-year review straw poll by typing your name below, and providing optional feedback/review. Then, click on 'Submit' and select "Save" to complete the review process. The due date for your submission is no later than May 15th, 2023.

Acknowledgement

Upload the Dean's Third-Year (Straw Poll) review/feedback (optional)

Drop files here or click to upload