SHSU Watermark Workflow
Tenure & Promotion Process Help Guide

Watermark Workflow reviews for Tenure and/or Promotion follows the multistep process illustrated in the flowchart below. Beginning at the Faculty submission step, the review portfolio is swiftly run through a system validation step by the Office of Faculty Records, and then is sent on to the Department Promotion and Tenure Advisory Committee. The portfolio then moves the administrative review steps until it reaches the Provost.

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:** Tenure and/or Promotion Review - Spring 2023  
**Due Date:** Sunday, January 8, 2023 11:59 PM CST

If you do not submit your materials by the due date, this will automatically advance to the Start Portfolio Evaluation review.

In accordance with [APS 900417](http://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/55b111e0-3014-4c1e-9663-4381e20e0d63/step/8d1144fd-f95b-412e-8153-450b6aa0f471/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personid=2390354), faculty members who intend to be considered for promotion and/or tenure must upload a complete Faculty Review Portfolio in Watermark Faculty Success by the due date. The schedule has been designed so that recommendations may be presented to the Board of Regents in May.

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:
The following step will be the Department Chair/School Director. Once the DPTAC chair submits the DPTAC votes and recommendation letter for a review process in Watermark Workflow, the Department Chair/School Director will receive an automated email:

Dear Chair DPTAC,

The following submission is now ready for your review:

Process: 
Faculty Member: Test Faculty
Due Date: Sunday, January 29, 2023 11:59 PM CST

In accordance with APS 380417, the Department Promotion and Tenure Advisory Committee (DPTAC) has three weeks to evaluate the faculty review portfolios of candidates being reviewed this cycle. The schedule has been designed so that recommendations may be presented to the Board of Regents in May.

A formal memo 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 memo must include a separate recommendation for or against promotion and/or tenure.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser’s address bar:
https://www.digitaleasures.com/login/shsu/faculty/app/ workflow/submissions/fda7eed2-3f2c-46b2-8af0-7deeda1db0f8/ step=45e52f1e-1df4-4471-8771-e949e2fnea37/assignee/workflow/subject/workflow: response&assignee=1460&personid=2338404

START REVIEWING

The following submission is now ready for your review:

Process: 
Faculty Member: Test Faculty
Due Date: Sunday, January 29, 2023 11:59 PM CST

In accordance with APS 380417, the Department Promotion and Tenure Advisory Committee (DPTAC) has three weeks to evaluate the faculty review portfolios of candidates being reviewed this cycle. The schedule has been designed so that recommendations may be presented to the Board of Regents in May.

A formal memo 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 memo must include a separate recommendation for or against promotion and/or tenure.

START REVIEWING

If the button above does not work, please copy and paste the following link into your browser’s address bar:
https://www.digitaleasures.com/login/shsu/faculty/app/ workflow/submissions/fda7eed2-3f2c-46b2-8af0-7deeda1db0f8/ step=45e52f1e-1df4-4471-8771-e949e2fnea37/assignee/workflow/subject/workflow: response&assignee=1460&personid=2338403
The next step will be the Dean’s step. Once the Department Chair/School Director has submitted their review and recommendation letter for a review process in Watermark Workflow, the College Dean/Executive Director will receive an automated email:

Dear Department Chair,

The following submission is now ready for your review:

Process: Tenure and/or Promotion Review - Spring 2023 (Test)
Faculty Member: Test Faculty
Due Date: Sunday, February 5, 2023 11:59 PM CST

In accordance with APS 800117, department chairs/school directors have one week to evaluate the faculty review portfolios of candidates being reviewed this cycle. The schedule has been designed so that recommendations may be presented to the Board of Regents in May.

A formal memo for each individual candidate will be uploaded into the Watermark Faculty Success system by the department chair/school director for both the candidate and dean’s review. The memo must include a separate recommendation for or against promotion and/or tenure.

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
   (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 Tenure and/or Promotion Process Steps**

**Faculty Step**

1. Click on Tenure and/or Promotion 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.
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 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 limit of just under 100,000 characters.

7. The next section of the Faculty Step is the Tenure and/or Promotion 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 and 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 six areas for files: Academic Year 2022-2023, Academic Year 2021-2022, Academic Year 2020-2021, Academic Year 2019-2020, Academic Year 2018-2019, and Academic Year 2017-2018 (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.

As an example, here is the faculty view of a DPTAC submission once the History Current Step has reached the Department Chair/School Director.
### 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 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 Response entries that will be submitted to the Department Chair/School Director including a recommendation for tenure and tally of votes, a recommendation for promotion and tally of votes, and a file upload with the DPTAC letter of recommendation. All of these fields are required – some are drop-down menus while tallies require a number (or N/A) if either Tenure or Promotion is not being sought as part of the process.
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 members 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 feels 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. We still have not determined whether this feature will remain in the actual implementation or not for campus.

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.

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 Review Portfolio, with all entries and links to uploaded files. The second section will contain all of the DPTAC recommendation votes, tallies, and uploaded letters.
3. The final section for the Department Chair/School Director step contains required fields with the department chair’s recommendations for Tenure and/or Promotion via drop-down menus, and a file upload area for their Recommendation Letter.
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.
Department Chair/School Director Step - Due February 5, 2023 @ 11:59 PM

Faculty Step - Test Faculty

Department Promotion and Tenure Advisory Committee Step - Test Faculty

Department Chair/School Director Tenure Recommendation

- Yes - Recommend for Tenure

Department Chair/School Director Promotion Recommendation

- Yes - Recommend for Promotion

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

Department Chair/School Director Recommendation Letter

[Drop file here or click to upload]

Submitted October 17, 2022
by Test Faculty

Submitted October 17, 2022
by Chair OITAC

Are you sure you want to Submit to Dean?

No
Yes