# SHSU Watermark Workflow Probationary Faculty (First-Year Review) Process Help Guide

Watermark Workflow for First-Year Reviews of Probationary Faculty follows the multistep process illustrated in the flowchart below. It is a simple three-step process beginning at the Faculty submission, proceeding through the Department Chair/School Director, and ending at Faculty Records.



## **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:  | TEST Probationary Faculty (First-Year) - Spring 2025 |
|-----------|--|
| Due Date: | Saturday, February 1, 2025 11:59 PM CST              |

In accordance with <u>APS 900417</u>, probationary faculty members must upload a complete Faculty Review Portfolio in Watermark Faculty Success by the due date. Please reference the <u>training resources</u> on the Academic Affairs Watermark website for more information.

The due date for your submission is **no later than February 1, 2025, at 11:59 p.m.** 



The final step will be the Department Chair/School Director. Once the probationary faculty member submits their materials in Watermark Workflow, the Department Chair/School Director will receive an automated email:

Dear Bearkat Test,

The following submission is now ready for your review:

| Process:   | TEST Probationary Faculty (First-Year) - Spring 2025 |
|------------|--|
| Candidate: | Test Faculty   |
| Due Date:  | Thursday, May 1, 2025 11:59 PM CDT                   |

In accordance with <u>APS 900417</u>, the department chair/school director shall review the performance of probationary faculty members beginning with the first year of employment. Please reference the <u>training resources</u> on the Academic Affairs Watermark website for more information.

A written summary for each faculty member will be uploaded into the Watermark Faculty Success system by the department chair/school director for the faculty member. The due date for your submission is **no later than May 1**, **2025**, **at 11:59 p.m**.

### 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/ec8a6b99-b4bb-46b2-a4b0-08f702dd8214/ step/9a7eef72-ddc4-4360-bedb-7204957f136a/assignee/2357490? embed=workflow:assignee,workflow:subject,workflow: response&subProcessId=3a1c790a-da76-41cc-aa96ed2068b8ee2c&orgId=1660&personId=2357490

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**

- Go to <u>Watermark Faculty Success</u> (<u>https://login.watermarkinsights.com/connect/samhoustonstateuniversity</u>)
- 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.

| San Hantan<br>San Lanverdy   | 0   |
|--|---|
| Activities Reports Workflow  |   |
| Activities - Sam Houston State University<br>Review a guide to manage your activities. | Q Search         SEARCH         Search Tips         Rapid Reports         DATA SHARE SETTINGS |
| <ul> <li>General Credentials/Expertise</li> </ul>                                      |   |
| Personal and Contact Information   | Licensures and Certifications   |
| Biography and Expertise  | Awards and Honors   |
| Degrees  | Media Appearances, Contributions, and Interviews  |
| Post-Graduate Training   | Faculty Development Activities Attended   |
| <ul> <li>Career Information</li> </ul>   |   |
| Professional Positions   | Consulting  |
| Administrative Assignments   | Professional Memberships  |

## Watermark Workflow Tasks

1. When you click the Workflows link, you will see the Workflow Tasks interface with both an Inbox and History section – the numbers in the parentheses show how many items you have in those sections.

The **Inbox** section will contain links to any tasks currently at a step where your input is required. The number in the parentheses next to Inbox shows the count of how many tasks you currently have assigned for your input. The column headers for the Inbox shows the following:

- Name the current review listing the review template for this workflow process
- Step the step within a workflow review process is currently located
- **Department** the SHSU academic department of the current review
- Candidate the name of the faculty member being reviewed in this process
- **Due Date** the date the current review process step must be submitted
- Date Received the date the current review process has appeared in your Inbox

You can sort the Inbox tasks by any of the columns – in the example the tasks are sorted by the Due Date (Ascending from soonest to latest dates.)

| ep track of outstanding tasks in your inbox, and v                                   | iew your review histor | у.              |             |                                |                                 |
|--|------------------------|-----------------|-------------|--------------------------------|---------------------------------|
| nbox (8)   |                        |                 |             |                                |                                 |
| Show Filters (0)   |                        |                 |             |                                |                                 |
| NAME I A -   | STEP -                 | DEPARTMENT -    | CANDIDATE - | DUE DATE -                     | DATE RECEIVED -                 |
| TEST Tenure and/or Promotion Review - Spring 2025                                    | Faculty                | University Wide | Me          | Sort<br>Sort Order             | •                               |
| TEST Promotion for Non-Tenure Track Faculty -<br>Spring 2025                         | Faculty                | University Wide | Me          |                                | 4:41                            |
| TEST Post-Tenure Review - Spring 2025  | Faculty                | University Wide | Me          |                                | ۵ 9:45                          |
| TEST Annual Review - Probationary Faculty -<br>(Third-Year Straw Poll) - Spring 2025 | Faculty                | University Wide | Me          | February 1, 2025 @ 11:59<br>PM | November 11, 2024 @<br>10:35 AM |
| TEST Annual Review - Probationary Faculty<br>(First-Year) - Spring 2025              | Faculty                | University Wide | Me          | February 1, 2025 @ 11:59<br>PM | November 11, 2024 @<br>10:15 AM |
| TEST Annual Review - Probationary Faculty<br>(2nd, 4th, and 5th year) - Spring 2025  | Faculty                | University Wide | Me          | February 1, 2025 @ 11:59<br>PM | November 11, 2024 @<br>10:24 AM |
| TEST Annual Faculty Evaluation System (FES)<br>Review (T/TT Faculty) - Spring 2025   | Faculty                | University Wide | Me          | February 1, 2025 @ 11:59<br>PM | November 11, 2024 @ 9:54<br>AM  |
| TEST Annual Faculty Evaluation (NTT Faculty) -<br>Spring 2025                        | Faculty                | University Wide | Me          | February 1, 2025 @ 11:59<br>PM | November 11, 2024 @<br>10:09 AM |

2. When you have the Inbox opened, you will also see a Show Filters option between the work Inbox and the Name column header. Show Filters allows you to apply various filters (based upon the column headers) to the visible Inbox tasks. The Show Filters link toggles with a Hide Filters option; the number shown in the parentheses counts how many filters you currently have applied. You can remove Filters either by clicking on the X next to any selected filter option, or remove all Filters by clicking on the Reset Filters link.

| /orkflow Tasks                                       |                        |                 |             |                          |                    |
|--|------------------------|-----------------|-------------|--------------------------|--------------------|
| eep track of outstanding tasks in your inbox, and vi | ew your review history |                 |             |                          |                    |
| Inbox (8)  |                        |                 |             |                          |                    |
|  |                        |                 |             |                          |                    |
| Show Filters (0)                                     |                        |                 |             |                          |                    |
|  |                        |                 |             |                          |                    |
| NAME I <sup>z</sup> -                                | STEP -                 | DEPARTMENT -    | CANDIDATE - | DUE DATE -               | DATE RECEIVED -    |
| TEST Tenure and/or Promotion Review - Spring         | Faculty                | University Wide | Me          | January 13, 2025 @ 11:59 | November 8, 2024 @ |
|  |                        |                 |             | PM                       | 10:56 AM           |

| orkflow Tasks<br>ap track of outstanding tasks in your inbox, and vi   |               | uu history                            |             |                              |                                |                                |
|--|---------------|---------------------------------------|-------------|------------------------------|--------------------------------|--------------------------------|
|  | sw your revie | w history.                            |             |                              |                                |                                |
| nbox (8)   |               |                                       |             |                              |                                |                                |
| Hide Filters (0)   |               |                                       |             |                              |                                |                                |
| Name   |               | Step                                  |             | Candidate                    |                                |                                |
| Enter Name   |               | Enter Step                            |             | Enter Candidate              |                                |                                |
| Department   |               | Due Date Status                       |             |                              |                                |                                |
| Any Department   | ~             | Any Status                            | ~           | APPLY FILTERS                | Reset Filters                  |                                |
|  |               |                                       |             | J                            |                                |                                |
| NAME 14 -  | STEP -        | DEPARTMENT -                          | CANDIDATE - |                              | DUE DATE -                     | DATE RECEIVED -                |
| TEST Tenure and/or Promotion Review - Spring<br>2025   | Faculty       | University Wide                       | Me          |                              | January 13, 2025 @ 11:59<br>PM | November 8, 2024 @<br>10:56 AM |
| TEST Promotion for Non-Tenure Track Faculty -<br>Spring 2025   | Faculty       | University Wide                       | Me          |                              | January 13, 2025 @ 11:59<br>PM | November 8, 2024 @ 4:4<br>PM   |
|  |               |                                       |             |                              | PM                             | r w                            |
|  |               | •                                     |             |                              | r ni                           |                                |
| Activities Reports Workflow  | 1             | ₽                                     |             |                              | FM                             |                                |
|  | 1             | <b></b>                               |             |                              | ΓM                             |                                |
| Activities Reports Workflov<br>Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a                                      |               | eview history.                        |             |                              | ΓM                             |                                |
| Workflow Tasks   |               | eview history.                        |             |                              | FM                             |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a   |               | eview history.                        |             |                              | FM                             |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a   |               | eview history.                        |             |                              | FM                             |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a<br>✓ Inbox<br>✓ Hide Filter (2)<br>Name                             |               | Step                                  |             | Candidate                    | FM                             |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a<br>✓ Inbox<br>✓ Hide Filter (2)<br>Name<br>Enter Name               |               | Step<br>Enter Step                    |             | Candidate<br>Enter Candidate |                                |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a<br>✓ Inbox<br>✓ Hide Filter (2)<br>Name<br>Enter Name<br>Department |               | Step<br>Enter Step<br>Due Date Status |             | Enter Candidate              |                                |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a<br>✓ Inbox<br>✓ Hide Filter (2)<br>Name<br>Enter Name               |               | Step<br>Enter Step                    |             | Enter Candidate              | Reset Filters                  |                                |
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, a<br>✓ Inbox<br>✓ Hide Filter (2)<br>Name<br>Enter Name<br>Department |               | Step<br>Enter Step<br>Due Date Status |             | Enter Candidate              | Reset Filters                  | DATE RECEIVED -                |

3. The History section will show a list of previous Watermark reviews. The Column headers are like the Inbox, with the addition of an Actions dropdown on the far-right column. The Actions button allows you to Recall or Download a Submission for Open reviews (those still in process). You can recall any submission on the step directly after yours. This option moves the selected submission back to your Inbox for revision and resubmission. You may only Recall a Submission if the Due Date has not passed. For Completed reviews, you will only have a Download option.

| Vorkflow Tasks<br>eep track of outstanding tasks in your inbox, and view y             | our review history.        |           |                             |          |
|--|----------------------------|-----------|-----------------------------|----------|
| Inbox (7)  |                            |           |                             |          |
| History (23)   |                            |           |                             |          |
| NAME   | CURRENT STEP -             | CANDIDATE | DUE DATE                    | ACTION   |
| TEST Tenure and/or Promotion Review - Spring 2025                                      | Start Portfolio Evaluation | Me        | January 14, 2025 @ 11:59 PM | 1        |
| Schedule Annual Faculty Evaluation System (FES)<br>Review (T/TT Faculty) - Spring 2024 | Completed                  | Me        | November 9, 2023 @ 11:59 PM | Recall   |
| Schedule Post-Tenure Review - Spring 2024  | Completed                  | Me        | November 11, 2023 @ 11:59   | Download |



| Activities Reports Workflow  |                            |           |                                 |         |
|--|----------------------------|-----------|---------------------------------|---------|
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, and view yo           | ur review history.         |           |                                 |         |
| > Inbox (7)  |                            |           |                                 |         |
| ✓ History (23)   |                            |           |                                 |         |
| NAME   | CURRENT STEP +             | CANDIDATE | DUE DATE                        | ACTIONS |
| TEST Tenure and/or Promotion Review - Spring 2025                                      | Start Portfolio Evaluation | Me        | January 14, 2025 @ 11:59 PM     | •       |
| Schedule Annual Faculty Evaluation System (FES)<br>Review (T/TT Faculty) - Spring 2024 | Completed                  | Me        | November 9, 2023 @ 11:59 PM     | Ŀ       |
| Schedule Post-Tenure Review - Spring 2024  | Completed                  | Me        | November 11, 2023 @ 11:59<br>PM | ownload |

## Watermark Workflow Probationary Faculty (First Year) Review Process Steps

### **Faculty Step**

1. Under the Workflows Tasks Inbox click on Probationary Faculty (First Year) to begin entering your portfolio.

| Activities Reports Workflow   |                           |                 |    |                          |                         |
|---|---------------------------|-----------------|----|--------------------------|-------------------------|
| Vorkflow Tasks<br>eep track of outstanding tasks in your inbox, and vi    | ew your review history.   |                 |    |                          |                         |
| Inbox (1)   |                           |                 |    |                          |                         |
| Show Filters (0)  |                           |                 |    |                          |                         |
| NAME *  | STEP -                    | DEPARTMENT -    |    | DUE DATE ↓Å ▼            | DATE RECEIVED -         |
| TEST Probationary Faculty (First-Year) - Spring                           | Faculty                   | University Wide | Me | February 1, 2025 @ 11:59 | December 3, 2024 @ 12:0 |
| 2025  |                           |                 |    | PM                       | PM                      |
| 2025<br>History (29)  |                           |                 |    | РМ                       | РМ                      |
|   | CURRENT STEP              | CANDIDATE       | =  | PM<br>DUE DATE           |                         |
| History (29)  |                           | and Me          |    |                          |                         |
| History (29)<br>NAME<br>TEST Probationary Faculty - (Third-Year Straw Pol | I) - Department Promotion | and Me          |    | DUE DATE                 | ACTION                  |

2. Each review process now contains reports that are run and automatically attached based on the date and time the review was launched. A list of these reports is now provided at the top of the Faculty Step of a review, providing the names and dates/times that these reports were last updated. You can click the **Refresh All** button in this section to immediately update all reports using your current Watermark Activities entries. The option to Refresh All reports can be run as often as desired. There is also an

option to update individual reports as they appear in the review portfolio (which will be covered later).

| Activities Reports Workflow  |   |
|--|---|
| Faculty Step - Due February 1st, 2025 @ 11:59 PM<br>Candidate: Test Faculty  | Actions ~                                       |
| <ul> <li>Reports Have Been Run and Auto-Attached</li> <li>The following reports have been attached to this submission on your behalf.</li> <li>Vita - Last updated November 11, 2024 at 10:16 AM</li> <li>Review Activity Report for Academic Year 2024-2025 - Last updated November 11, 2024 at 10:16 AM</li> <li>To ensure that the data included for your submission is current, we recommend that you refresh these reports. You can do this by sele individual report below, or you can use the "Refresh All" button here to refresh the reports listed above.</li> </ul> | ecting the "Refresh Report" button next to each |

- 3. When working on your faculty review portfolio, click on the "Actions" button in the upper right and select "Save Draft" until your submission form is complete. You must click "Save Draft" to retain any entered or updated information if you wish to work on your review portfolio entries across several sessions logging into your Watermark account. If you close your browser window without saving, your work will not be retained.
- 4. Once you have completed your review portfolio, you should now click on "Actions" and select "Submit to Department Chair/School Director" to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded <u>will not be saved</u>.
- 5. Note: you will see the due date for your submission Probationary Faculty (First Year), it is no later than February 1, 2025, at 11:59 p.m.
- 6. Note: The maximum file size is 1GB. You will receive an error message "Unable to upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.
- Faculty Review Portfolio screen provides areas for including a current Curriculum Vitae (CV). This can either be generated automatically based upon your activity's entries in Watermark, or there is a CV Upload area where you may choose to provide a CV file.

| Activities Reports Workflow  |   |        |           |   |
|--|---|--------|-----------|---|
| K Faculty Step - Due February 1st, 2025 @ 11:59 PM<br>Candidate: Test Faculty  | * | CANCEL | Actions ~ | ] |
| First-Year Review Portfolio  |   |        |           |   |
| As you build your portfolio, you can click on "Actions" and select "Save Draft" until you<br>are confident your submission form is complete.   |   |        |           |   |
| Once you have completed your review portfolio, it is important that you <b>click on</b> "Actions" and select "Submit to Department Chair/School Director" to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded <u>will not be saved</u> .   |   |        |           |   |
| The due date for your submission is no later than February 1, 2025, at 11:59 p.m.  |   |        |           |   |
| Note: The maximum file size is 1GB. You will receive an error message "Unable to<br>upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.  |   |        |           |   |
| Curriculum Vitae   |   |        |           |   |
| Use the space below to upload a copy of your current curriculum vita to be considered<br>for your first-year review. The report below is generated from the data entered in<br>Activities. When preparing your submission, make sure to preview the report. If needed,<br>navigate to Activities to make any necessary edits. Then, return to your review in<br>Workflow and refresh the report. |   |        |           |   |
| Note: The report will not automatically refresh when the Activities data is<br>changed. You <u>must</u> refresh the report in Workflow. The report will be date and<br>time stamped with the latest refresh date.  |   |        |           |   |
| If your discipline requires a specific format, you can use the upload field to attach a copy<br>of your current vita.  |   |        |           |   |
| Vita<br>Last Updated<br>November 11th, 2024 at 10:16 AM<br>CV Upload   |   |        |           |   |
| Drop files here or click to upload   |   |        |           |   |

8. The automatically generated Vita in Watermark is created using information from your entries in the Activities module. You can view this automated CV by clicking on the Adobe Acrobat icon. The Last Updated date and time shows you when the current Vita report was created – this will initially be set at the date and time that the review process was first launched. If you make changes to your Activity Entries after starting a portfolio submission, but prior to submitting, you can update the auto generated Vita by clicking the Refresh button – which will also display the refreshed Vita's revised date and time.

| A | Activities Reports Workflow  |           |
|---|--|-----------|
| < | Candidate: Test Faculty  | Actions ~ |
|   | First-Year Review Portfolio  |           |
|   | As you build your portfolio, you can click on "Actions" and select "Save Draft" until you<br>are confident your submission form is complete.   |           |
|   | Once you have completed your review portfolio, it is important that you <b>click on</b><br>"Actions" and select "Submit to Department Chair/School Director" to advance<br>your documents to the next step in the review process. If the system auto-advances on<br>the due date, any documents uploaded <u>will not be saved</u> .  |           |
|   | The due date for your submission is no later than February 1, 2025, at 11:59 p.m.  |           |
|   | Note: The maximum file size is 1GB. You will receive an error message "Unable to<br>upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.  |           |
|   | Curriculum Vitae   |           |
|   | Use the space below to upload a copy of your current curriculum vita to be considered<br>for your first-year review. The report below is generated from the data entered in<br>Activities. When preparing your submission, make sure to preview the report. If needed,<br>navigate to Activities to make any necessary edits. Then, return to your review in<br>Workflow and refresh the report. |           |
|   | Note: The report will not automatically refresh when the Activities data is<br>changed. You <u>must</u> refresh the report in Workflow. The report will be date and<br>time stamped with the latest refresh date.  |           |
|   | If your discipline requires a specific format, you can use the upload field to attach a copy<br>of your current vita.  |           |
|   | Vita<br>Refresh Vita<br>Report<br>Report   |           |
|   | CV Upload  |           |
|   | Drop.files here or click to upload   |           |

9. If you click on the Refresh icon to update the autogenerated Vita, you will see a popup screen detailing what will happen if you choose yes. The autogenerated report will be updated based on the most current Activities entries, and this cannot be undone. You may generate a current copy of your Vita report by going to the Reports Tab if you want to see what the resulting Vita will look like before refreshing the version in your review portfolio.

| Activities Reports Workflow   |  |           |
|---|--|-----------|
| <ul> <li>Faculty Step - Due February 1st, 2025 @</li> <li>Candidate: Test Faculty</li> </ul>  | 11:59 PM   | Actions ~ |
| First-Year Review Portfolio   |  |           |
| As you build your portfolio, you can click on "Actions" and<br>are confident your submission form is complete.<br>Once you have completed your reverse portfolio, it is import<br>"Actions" and select "Submit to Department ChairSen<br>your documents is to he next sign in the review process. If it<br>the due date, any documents uploaded will not be saved.<br>The due date for your submission is no later than Febr<br>Nets: The maximum file size is 103. You will receive an e | This action will update the attached report based on the information<br>available under Activities. To preview this report's updated output, go to<br>Reports and run the report from there from the report's<br>contents there cannot be undone.<br>Are you sure you want to proceed? |           |
| upload file.xxxxx" if the file is too large. You may simply clic  |  |           |
| Use the space below to upload a copy of your current curricu<br>for your first-year review. The report below is generated from<br>Activities. When preparing your submission, make sure to pre<br>navigate to Activities to make any necessary edits. Then, retu<br>Workflow and refresh the report.  | the data entered in<br>view the report. If needed,   |           |
| Note: The report will not automatically refresh when the <i>i</i><br>changed. You <u>must</u> refresh the report in Workflow. The re<br>time stamped with the latest refresh date.  |  |           |
| If your discipline requires a specific format, you can use the u<br>of your current vita.   | pload field to attach a copy   |           |
| Vita<br>Last Updated<br>November 11th, 2024 at 10:16 AM   | C  |           |
|   |  |           |

Once you have clicked Yes on the Vita Refresh popup window you will see the Last Updated date and time change.

### **Curriculum Vitae**

Use the space below to upload a copy of your current curriculum vita to be considered for your first-year review. The report below is generated from the data entered in Activities. When preparing your submission, make sure to preview the report. If needed, navigate to Activities to make any necessary edits. Then, return to your review in Workflow and refresh the report.

Note: The report will not automatically refresh when the Activities data is changed. You <u>must</u> refresh the report in Workflow. The report will be date and time stamped with the latest refresh date.

If your discipline requires a specific format, you can use the upload field to attach a copy of your current vita.



10. Alternatively, you may upload or drag and drop files into the CV Upload area – any file type can be used.

| + 🔜 « Watermark > Workflow >      | Tenure & Promotion Documents v 🖏 Sear  | ch Tenure & Promotion D 🔎 20/step       | o/ea5963b9-99bf-4611-95f1-ef0f347bc233/assignee/2390354?_s=0&subProcessId=64750227 A <sup>№</sup> 🖧 |
|-----------------------------------|--|---|---|
| Organize 🔻 New folder             |  | 88 • 💷 👔                                |   |
| Workflow Screenshots              | Name   | Date modified                           |   |
| Undergraduate Research Reports    | 2022   | 1/31/2023 8:57 AM                       |   |
| Watermark Faculty Activities      | Annual Review Narrative Test Faculty 2022.pdf  | 10/17/2022 9:48 AM                      | Actions   |
| Watermark Reports                 | CV 2022 Test Faculty.docx  | 10/14/2022 7:36 AM                      |   |
| Workflow                          | CV 2022 Test Faculty.pdf   | 8/19/2022 2:41 PM                       |   |
| FES Forms 2022                    | CV 2024 Test Faculty.pdf   | 8/19/2022 2:41 PM                       |   |
| Spr 2025 Workflow                 | Dean third-year review feedback Test Faculty 2022.docx   | 8/19/2022 8:58 AM                       |   |
| Tenure & Promotion Documents      | Dept Chair annual review Test Faculty 2022.docx  | 8/19/2022 8:58 AM                       |   |
| Entrance of Homonon Documents     | Dept Chair Feedback Net Faculty 2022.pdf   | 10/17/2022 9:48 AM                      |   |
| Program Files                     | Dept Chair Recommendation Letter Test Faculty 2022.docs  |   |   |
|                                   | Dept Chair Recommendation better Test Faculty 2022.pdf   | 10/17/2022 9:48 AM<br>8/19/2022 8:58 AM |   |
| Program Files (x86)               | Dept Chair third-year review feedback Test Faculty 2022.dc<br>DPTAC Post-Tenure Vote Evaluation Test Faculty 2022.docx |   |   |
| ProgramData                       | DPTAC Post-Tenure Vote Evaluation Test Faculty 2022.docx DPTAC Post-Tenure Vote Evaluation Test Faculty 2022.odf       | 10/17/2022 8:58 AM                      |   |
| Snapshots                         | DPTAC Recommendation Letter Test Faculty 2022.pdf  | 8/19/2022 8:58 AM                       |   |
| Sun                               | DPTAC Recommendation Letter Test Faculty 2022.pdf  | 10/17/2022 9:48 AM                      |   |
| Support Button                    | DPTAC Written Summary Test Faculty Annual Review 2022  |   |   |
| temp                              | DPTAC Written Summary Test Faculty Third-Year Review 2   |   |   |
| Users                             | First-Year Review NarrativeTest Faculty 2022.pdf   | 10/17/2022 9:48 AM                      |   |
| Windows                           | Personal NarrativeTest Faculty 2022.docx   | 819/2022 8:58 AM                        |   |
| Apps (R:)                         | Personal NarrativeTest Faculty 2022.pdf  | 10/17/2022 9:48 AM                      |   |
| dedo009 (\\WinFSHD2\Users\$) (S:) | Scholarly Creative Test Faculty 2022.docx  | 8/19/2022 9:58 AM                       |   |
| · · · · · · · · · · · · · · · · · | / <  | >                                       |   |
| File name: CV 2024 Test Facult    | y.pdf v All f  | files (*.*)                             |   |
|                                   | Upload from mobile   | Open Cancel                             |   |
|                                   | CV Upload  |   |   |
|                                   | 1  |   | shere or click to upload  |

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

| Ac | tivities  | Reports   | Workflow   |   |  |                   |                    |      |   |        |         |   |
|----|---|---|--|---|--|-------------------|--------------------|------|---|--------|---------|---|
| <  |   |   |  | st, 2025 @ 11:5<br>Il receive an error mes<br>may simply click "Delet   |  |                   |                    |      | * | CANCEL | Actions | × |
|    | Use the sp<br>for your firs<br>Activities. V<br>navigate to<br>Workflow a<br>Note: The<br>changed. '<br>time stam | st-year review. T<br>When preparing<br>Activities to ma<br>und refresh the r<br>report will not<br>You <u>must</u> refre<br>ped with the lav<br>ipline requires a | load a copy of yo<br>he report below i-<br>your submission,<br>ske any necessan<br>eport.<br>automatically re<br>sh the report in 1<br>test refresh date | ur current curriculum vi<br>s generated from the da<br>make sure to preview<br>r edits. Then, return to y<br>fresh when the Activi<br>Workflow. The report of<br>rou can use the upload | ta entered in<br>he report. If neede<br>our review in<br>ies data is<br>vill be date and | d,                |                    |      |   |        |         |   |
|    | Vita  | -   | ed<br>27th, 2024 at 11:19  | AM  | C  |                   |                    |      |   |        |         |   |
|    | CVU   | pload   |  |   |  | Drop files here c | or click to upload | <br> |   |        | <br>    |   |
|    |   | <u>CV 2024</u>  | Test Faculty.pdf (   | 249.66 KB)  |  | Ê                 | )                  |      |   |        |         |   |

12. The next section of the Faculty Review Portfolio can be used to include a First-Year Review Narrative. This is an optional step, and can be done either by uploading a file to the First-Year Review 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.

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| ← → ✓ ↑ 🧧 « Workflow → Tenure & Pror  |  | 1011-8004-0470   | 37955c48e/step/65e070fe-edee-4ce | 5-bbe2-40bdb0f25ec3/assignee/2390354 | ?_s=0&subProcessId=09e | ⊕ A <sup>%</sup> ☆ | G I D |
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| Activiti | es Reports   | Workflow  |  |           |           |
|----------|--|---|--|-----------|-----------|
|          | culty Step - Du  | February 1st, 2025 @ 11:59 PM   |  | La CANCEL | Actions ~ |
| Use      | the space below to u<br>ew.  | ew Narrative<br>oad a narrative file to be considered for your first-year<br>t your narrative directly into the text box below.   |  |           | )         |
|          |  | Review NarrativeTest Faculty 2024.odf (252.83 KB)   | Drop files here or click to upload   |           |           |
| (        | B i U<br>X<br>Lorem Iparm dolo<br>impedit est aliqua<br>laborum aspernat<br>qui accusamus re<br>Ea tempore omnis<br>expedita suscipit<br>dolor eveniet vel r<br>DEGUE DUlla qui yo<br>Ebra corporis fugg<br>dicta joizer et volt | sil amet. Cum dolor suscipit sit autem saepe et labore er<br>i sequi in quos accusantium. At nemo autem hic dolor co<br>r quo eaque laborum sit sunt voluptatem qui rerum aperia<br>usandae 33 exercitationem corporis non autem facilis.<br>sit voluptatibus recusandae aut voluptas dolores quo atq<br>a dicta culpa eos molestiae dolores. Et amet vitae ex asp<br>olestiae adipisci ut neque errori Est <u>ipsam quia ut laborto</u><br>o <u>voluptates</u> .<br>non <u>corrupti jure qui eius incidunt</u> . Qui <u>quae cupiditate au</u><br><u>tatem</u> tempore <u>eum totam impedit</u> qui <u>quia quis</u> . Vel quia<br><u>yout palisum ipsam</u> . | nim est coloremque<br>nsequuntur et<br>am. Ea veilt officiis<br>ue sequi hic<br>eriores magnam ut<br>sam officiis non<br>ut setuta dolorat |           |           |

13. The final section of the Faculty Step is the First-Year Review Portfolio Documents area. This section provides a Review Activity Report for the Academic Year generated from your Activities records based upon their dates (the reports for an academic year contains a date range that spans from September 1<sup>st</sup> until the following August 31<sup>st</sup>). This report will not automatically refresh when the Activities data is added or changed. You must refresh the report in Workflow reviews. Each report will be date and time stamped with the latest refresh date.

You can click on the Adobe Acrobat icon in the left to view the current Review Activity Report associated with that Academic Year. This will open an additional browser tab to display a PDF version of the report.

| First-Year Review Portfolio Documents   |
|---|
| Use the space below to upload documents to be considered for your first-year<br>review. The reports below are generated from the data entered in Activities. A document<br>upload field has also been provided to include any supporting documents needed to<br>complete your review portfolio. |
| Note: The report will not automatically refresh when the Activities data is<br>changed. Your guizt refresh the report in Workflow. The report will be date and<br>time stamped with the latest refresh date.  |
| Reports By Academic Year  |
| Review Activity Report for Academic Year 2024-2025  |
| Last Updated<br>November 11th, 2024 at 10:16 AM   |
| Upload any other Supporting Documents (e.g., support letters, etc.)   |
| Drop files here or click to upload  |

If the loaded Review Activity Report is missing entries that have been added to the

Activities database since the Last Updated timestamp, click on the Refresh icon contract the right of each report to update the report.

| First-Year Review Portfolio Documents   |
|---|
| Use the space below to upload documents to be considered for your first-year<br>review. The reports below are generated from the data entered in Activities. A document<br>upload field has also been provided to include any supporting documents needed to<br>complete your review portfolio. |
| Note: The report will not automatically refresh when the Activities data is<br>changed. You mugit refresh the report in Workflow. The report will be date and<br>time stamped with the latest refresh date.   |
| Reports By Academic Year  |
| Review Activity Report for Academic Year 2024-2025  |
| Last Updated<br>November 11th, 2024 at 10:16 AM   |
| Upload any other Supporting Documents (e.g., support letters, etc.)   |
| Drop files here or click to upload  |
| · · · · · · · · · · · · · · · · · · ·   |

When you click on the Refresh button you will see a popup screen detailing what will happen if you choose yes. The autogenerated report will be updated based on the most current Activities entries, and this cannot be undone.

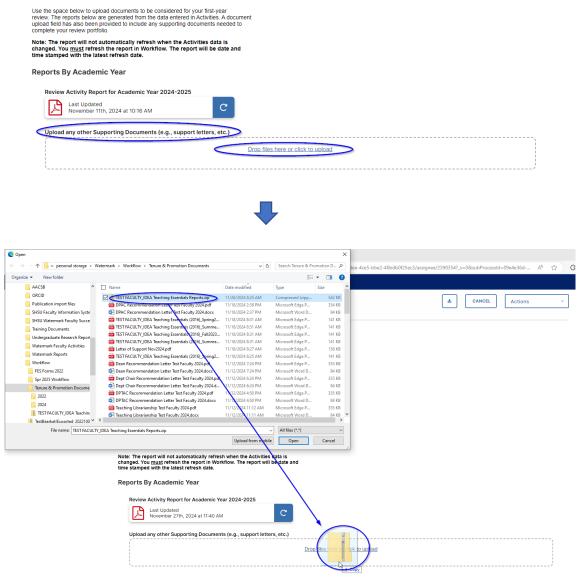
| Activities Reports Workflow   |  |           |
|---|--|-----------|
| K Faculty Step - Due February 1st, 2025 @<br>Candidate: Test Faculty  | 11:59 PM   | Actions ~ |
| Ea tempore omnis sit voluptatibus recusandae aut v<br>expedita suscipit ea dicta culpa eos molestiae dolori   |  |           |
| dolor eveniet vel molestiae adipisci ut neque error<br>neque nulla qui yeto volugitates<br>Eum corpors fuga non corrupti (ure qui elus incidu<br>dicta totam et volugitatem tempore eum totam impe  | This action will update the attached rapport based on the information<br>available under Activities. To preview this report's updated output, go to<br>Reports and run the report from there first. Refreshing the report's<br>contents here cannot be undone. |           |
| Voluptates distinctio aut galisum ipsam.  | Are you sure you want to proceed?  |           |
| Use the space below to upload documents to be considered<br>review. The reports below are generated from the data enter<br>upload field has also been provided to include any supportin<br>compilete your review portfolio.<br>Note: The report will not automatically refresh when the | ed in Activities. A document<br>g documents needed to  |           |
| changed. You <u>must</u> refresh the report in Workflow. The r<br>time stamped with the latest refresh date.  |  |           |
| Reports By Academic Year  |  |           |
| Review Activity Report for Academic Year 2024-20<br>Last Updated<br>November 11th, 2024 at 10:16 AM   | C  |           |

You may generate a current copy of a Review Activity Report by going to the Reports Tab and running a report with the same academic year date range being used in your portfolio documents. This will create a report in one of three file formats (MS Word, PDF, or HTML) for you to view before refreshing the version in your review portfolio.

| Faculty Step - Due February 1st, 2025 @ 11:55   |  |                        |          |                     |
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| Candidate: Test Faculty   |  |                        |          |                     |
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| Ea tempore conte se voluptatibus recutandas aul voluptas<br>expedita suscipit ça dicta cuba qos molestias dolores. El a<br>dolor exercisir vel notestias adilesci ul negate enort Est lopa<br>negate nulla qui velo voluptates.                 | met vitae ex asperiores magnam ut                                      |                        |          |                     |
| beset book 44 bete beseter.   | Characters : 651/99999   |                        |          |                     |
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| First-Year Review Portfolio Documer   |  |                        |          |                     |
| Use the space below to upload documents to be considered for you<br>review. The reports below are generated from the data entered in A<br>upload field has also been provided to include any supporting docu<br>complete your review portfolio. | ctivities. A document<br>nents needed to                               |                        |          |                     |
| Note: The report will not automatically refresh when the Activit<br>changed. You <u>must</u> refresh the report in Workflow. The report w<br>time stamped with the latest refresh date.   | ies data is<br>vill be date and  |                        |          |                     |
| Reports By Academic Year  |  |                        |          |                     |
| Review Activity Report for Academic Year 2024-2025  | _  |                        |          |                     |
| Last Updated<br>November 27th, 2024 at 11:40 AM   | С  |                        |          |                     |
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|   |  |                        |          |                     |
|   |  |                        |          |                     |
| Activities Reports Workflow   |  |                        |          |                     |
| Reports   |  |                        |          | CREATE A NEW REPORT |
| Select the report you would like to view or edit, or select to create a   |  |                        | l        | 3 Items             |
| NAME .  | an report.   | CREATED BY             |          | ACTIONS             |
|   |  |                        |          |                     |
| Annual Activity Report  |  | Watermark              |          | ۵                   |
|   |  | Watermark              |          | A<br>A              |
| Annual Activity Report  |  |                        |          |                     |
| Review Activity Report  |  | Watermark              |          | ۵                   |
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| Va  | End Date 8/31/2025   | Watermark<br>Watermark |          |                     |
| Va  | End Date 8/31/2025   | Watermark<br>Watermark |          |                     |
| Va  | End Date 8/31/2025   | Watermark<br>Watermark | βh       |                     |

14. In addition to the Review Activity Report generated from your Activities database entries, there is also an area where you may upload or drag and drop files with any other Supporting Documents for your review portfolio – any file type can be used. This is the best location to add any IDEA Qualitative Reports that will be used in your evaluation.

#### First-Year Review Portfolio Documents

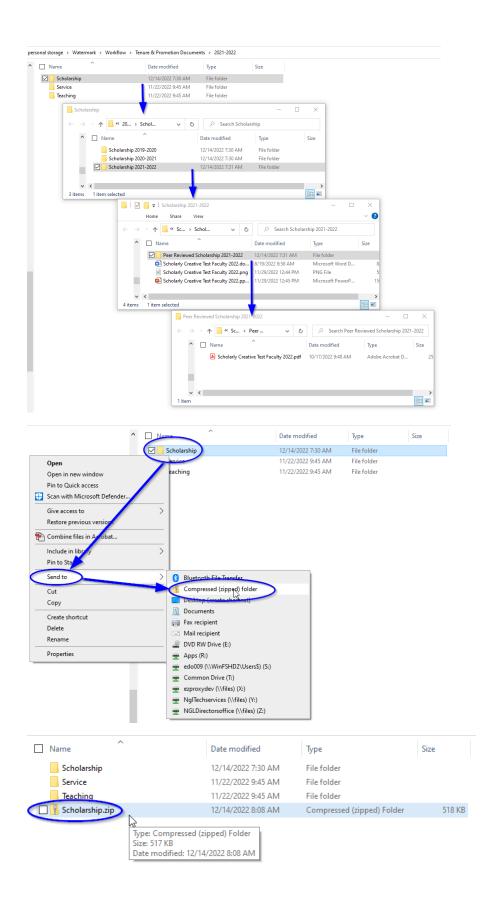


**Note:** Your materials will be displayed to reviewers exactly as they appear on your faculty submission page. Files uploaded within each of the upload fields will appear in two columns, moving from left to right, then top to bottom.

| Activi                          | ties  | Reports   | Workflow  |  |   |   |          |             |                    |             |                  |                   |              |         |          |   |  |
|---------------------------------|---|---|---|--|---|---|----------|-------------|--------------------|-------------|------------------|-------------------|--------------|---------|----------|---|--|
|                                 |   | <b>/ Step - Due</b><br>e: Test Facult   | ro voluntates   | st, 2025 @ 11  | 1:59 PM   | eriores magnam ut<br>sam officiis non   |          |             |                    |             | *                | C/                | NCEL         | Actions | 6        | ~ |  |
|                                 | di  | cta totam et volu   |   | um totam impedit q   | ui quae cupiditate au<br>ui quia quis. Vel quia   | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ |          |             |                    |             |                  |                   |              |         |          |   |  |
|                                 |   |   |   |  | Cha   | aracters : 873/9999                     | э        |             |                    |             |                  |                   |              |         |          |   |  |
| U:<br>re<br>up<br>cc<br>N<br>cl | se the si<br>view. The<br>bload file<br>omplete<br>ote: The<br>hanged.<br>me stam<br>eport:<br>Revi | pace below to up<br>the reports below<br>Id has also been<br>your review port<br>report will not<br>You <u>must</u> refre-<br>nped with the la<br>s By Acader<br>ew Activity Rep<br>Last Update<br>November 2 | aload documents i<br>are generated fro<br>provided to inclu<br>folio.<br>automatically re<br>sh the report in 1<br>test refresh date<br>mic Year<br>port for Academi<br>ed<br>27th, 2024 at 11:41 | le any supporting d<br>fresh when the Ac<br>Vorkflow. The rep<br>C<br>C Year 2024-2025 | your first-year<br>in Activities. A docum<br>ocuments needed to<br>tivities data is<br>ort will be date and | nent                                    |          |             |                    |             |                  |                   |              |         |          |   |  |
|                                 | Upic  | ad any other S  | upporting Docur   | nents (e.g., suppo   | rt letters, etc.)   | Drop files here or                      | r click  | to upload   |                    |             |                  |                   |              |         |          |   |  |
|                                 | ſ   |   |   | ing Francisco Deces  |   | -                                       | <u>م</u> |             |                    | 004-16/45   | 7.00 (/D)        |                   |              |         | <b>_</b> |   |  |
|                                 | Ļ   |   | ULTY_IDEA Teacl   | ing Essentials Repo  | orts.zip ( <b>541.85 KB</b> )   |   | <u>ک</u> | Letter of S | upport Nov2        | 024.pdf (15 | 7.06 KB)         |                   |              |         | <u> </u> |   |  |
|                                 |   | Teaching  | Librarianship Tes   | Faculty 2024.docx  | <u>(83.68 KB)</u>   | Â                                       | W        | Supporting  | <u>g Documents</u> | Test Facult | <u>y 2024.do</u> | cx ( <b>83.68</b> | <u>8 KB)</u> |         | Ô        |   |  |

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.



A reminder that you can click on Actions in the upper right and choose Save Draft to retain any entries and file uploads you have completed, but prior to the final submission to the Department Chair/School Director.

| Activities Reports Workflow  |  |
|--|--|
| Faculty Step - Due February 1st, 2025 @ 11:59 PM   | CANCEL Actions   |
| Candidate: Test Faculty lestiae adipisci ut neque errori Est ipsam quia ut laboriosam officiis non   |  |
| neque nulla qui vero voluptates.   | Save Draft   |
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| Upload any other Supporting Documents (e.g., support letters, etc.)  |  |
| Drop files here or   | click to upload  |
|  |  |
| TEST FACULTY_IDEA Teaching Essentials Reports.zip (541.85 KB)  | Letter of Support Nov2024.pdf (157.06 KB)              |
| Teaching Librarianship Test Faculty 2024.docx (83.68 KB)   | Supporting Documents Test Faculty 2024.docx (83.68 KB) |

15. Once you have completed all of your entries and uploads for the Faculty Step, click on the Actions – Submit to Department Chair and click Yes in the following popup window.

| Activit  | ties               | Reports                                  | Workflo                          | w                                    |                |                  |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|--|--------------------|--|----------------------------------|--------------------------------------|----------------|------------------|--------------------------------------|--------|-------------------|-----------|------------|----------|-----------|------------|----------|------------|---|---|
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| Ca   | ndidate            | Test Facult                              | yisandae 33                      |                                      |                |                  |                                      |        |                   |           | -          |          |           |            |          |            |   |   |
|  | ex<br>dol          | pedita suscipit e<br>lor eveniet vel n   | ea dicta culpa<br>nolestiae adir | eos molestiae d<br>isci ut neque err | olores. Et ame | et vitae ex aspe | riores magnam ut                     |        |                   |           |            |          | Departm   |            | ir/Schoo | l Director | > |   |
|  | dic                | ta totam et volu                         | iptatem temp                     | ore eum totam in                     |                |                  |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  |                    |  |                                  |                                      |                | Cha              | aracters : 873/9999                  | 9      |                   |           |            |          |           |            |          |            |   |   |
| ch<br>tin  | langed.<br>ne stam | You <u>must</u> refre<br>ped with the la | sh the report<br>test refresh    | t in Workflow. T                     |                |                  |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  | oporta             | by Actuaci                               | ine rear                         |                                      |                |                  |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  | Revie              | Last Update                              | ed                               |                                      | 1-2025         | C                |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  | Uploa              | ad any other S                           | upporting D                      | ocuments (e.g.,                      | support lette  | ers, etc.)       |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  | 1                  |  |                                  |                                      |                |                  | Drop files here o                    | or cli | ick to upload     |           |            |          |           |            |          |            |   |   |
| <ul> <li>C Racutty Step - Due February 1st, 2025 @ 11:59 PM</li> <li>Candate: Test Faculty</li> <li>Internore genes of volkatedbas inconsentence in the second in the second</li></ul> |                    |  |                                  |                                      |                |                  |                                      |        |                   |           |            |          |           |            |          |            |   |   |
|  |                    | TEST FAC                                 | CULTY_IDEA 1                     | eaching Essentia                     | Is Reports.zip | (541.85 KB)      | ŵ                                    | l      | Letter of Support | Nov2024   | Lpdf (157  | .06 KB)  |           |            |          | â          |   |   |
|  |                    |  | Librarianship                    | Test Faculty 202                     | 4.docx (83.68  | <u>3 KB)</u>     | â                                    | E      |                   | ments Ter | st Faculty | 2024.doc | × (83.68) | <u>(B)</u> |          | â          |   |   |





16. 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.

| Activities Reports Workflow  |   |                    |                              |                 |
|--|---|--------------------|------------------------------|-----------------|
| NAME -   | STEP -  | CANDIDATE -        | DUE DATE 🎼 🝷                 | DATE RECEIVED - |
|  |   | No Data to Display |                              |                 |
| History (30)   |   |                    |                              |                 |
| NAME   | CURRENT STEP -  | CANDIDATE          | DUE DATE                     | ACTIONS         |
| TEST Tenure and/or Promotion Review - Spring 2025                                  | Dean  | Me                 | February 25, 2025 @ 11:59 PM | •               |
| TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025                         | Department Chair/School<br>Director                   | Me                 | May 1, 2025 @ 11:59 PM       | •               |
| TEST Promotion for Non-Tenure Track Faculty - Spring<br>2025                       | Department Chair/School<br>Director                   | Me                 | April 1, 2025 @ 11:59 PM     | •               |
| TEST Annual Faculty Evaluation System (FES) Review<br>(T/TT Faculty) - Spring 2025 | Department Chair/School<br>Director                   | Me                 | May 1, 2025 @ 11:59 PM       | •               |
| (EST Probationary Faculty (First-Year) - Spring 2025                               | Department Chair/School<br>Director                   | Me                 | May 1, 2025 @ 11:59 PM       | · ·             |
| TEST Probationary Faculty - (Third-Year Straw Poll) -<br>Spring 2025               | Department Promotion and<br>Tenure Advisory Committee | Me                 | April 1, 2025 @ 11:59 PM     | Recall          |
| TEST Probationary Faculty (2nd, 4th, and 5th year) -<br>Spring 2025                | Department Promotion and<br>Tenure Advisory Committee | Me                 | April 1, 2025 @ 11:59 PM     | Download        |
| TEST Post-Tenure Review - Spring 2025  | Department Promotion and<br>Tenure Advisory Committee | Me                 | April 1, 2025 @ 11:59 PM     | *               |

### **Department Chair/School Director Step**

 The Watermark Navigation bar for Department Chairs/School Directors includes some additional modules that do not appear on faculty accounts. The Workflow tab for a Department Chair/School Director has a drop-down menu with options including Tasks and Submissions.

| Activities - Sam Houston State Univer | SEARCH Search Tips Rapid Reports DATA SHARE SETTINGS |
|---------------------------------------|--|
| General Credentials/Expertise         |  |
| Personal and Contact Information      | Licensures and Certifications                        |
|                                       | Awards and Honors                                    |
| Biography and Expertise               | Awards and Honors                                    |
| Biography and Expertise<br>Degrees    | Media Appearances, Contributions, and Interviews     |

2. Current review processes waiting for the Department Chair/School Director input and submission, and historical review processes that have already received the Department Chair/School Director submissions are located in the Workflow Tasks. Workflow Tasks Inbox and History will function the same way as Step #1 of Watermark Workflow Tasks on page 4 above. In the Workflow Tasks Inbox, you will see all review processes awaiting your input and submission.

| Activities Manage Data Reports   | s Workflow 🔻                        |                 |               |                                  |                                |  |  |  |
|--|-------------------------------------|-----------------|---------------|----------------------------------|--------------------------------|--|--|--|
| Workflow Tasks<br>Keep track of outstanding tasks in your inbox, and view your review history. |                                     |                 |               |                                  |                                |  |  |  |
| Inbox (1)  |                                     |                 |               |                                  |                                |  |  |  |
| Show Filters (0)   |                                     |                 |               |                                  |                                |  |  |  |
| NAME -   | STEP -                              | DEPARTMENT -    | CANDIDATE -   | DUE DATE 12 +                    | DATE RECEIVED *                |  |  |  |
| TEST Tenure and/or Promotion Review - Spring 2025  | Department Chair/School<br>Director | University Wide | Faculty, Test | February 11, 2025 @ 11:59<br>PM  | November 12, 2024 @<br>5:06 PM |  |  |  |
| History (6)  |                                     |                 |               |                                  |                                |  |  |  |
| NAME   | CURRENT STEP                        | CANDIDATE       |               | DUE DATE                         | ACTION                         |  |  |  |
| Test Spring 2023 Annual Review - Probationary Fa   | aculty Completed                    | Me              |               | September 20, 2022 @ 11:59<br>PM | •                              |  |  |  |
| Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track) (DEMO                     | Completed                           | Me              |               | May 1, 2023 @ 11:59 PM           | *                              |  |  |  |

3. The Workflow Submissions option provides View access (under Actions) to current (Open) review processes within their department or school, and additionally a Download option (under Actions) for Closed/Completed reviews. The Submissions screen provides the Department Chair/School Director the ability to monitor the progress of ongoing reviews before they have appeared in their Tasks Inbox.

| Workflow Sub      |   | Tasks   | flow 🔺            |                  |                 |         | BUL           | K DOWNLOAD EX    | (PORT VIEW |
|-------------------|---|---|-------------------|------------------|-----------------|---------|---------------|------------------|------------|
| Filters Status: 0 | open ×  |   |                   |                  |                 |         |               |                  |            |
| CANDIDATE 12 -    | TEMPLATE -  | SCHEDULE -  | STATUS <b>T</b> - | COLLEGE -        | DEPARTMENT *    | STEP -  | REVIEWER -    | DUE DATE -       | ACTIONS    |
| Faculty, Test     | Annual Review -<br>Probationary<br>Faculty (2nd, 4th,<br>and 5th year) -<br>Spring 2025   | TEST Annual<br>Review -<br>Probationary<br>Faculty (2nd, 4th,<br>and 5th year) -<br>Spring 2025   | Open              | Academic Affairs | University Wide | Faculty | Faculty, Test | February 1, 2025 | •          |
| Faculty, Test     | Annual Review -<br>Probationary<br>Faculty (First-<br>Year) - Spring<br>2025              | TEST Annual<br>Review -<br>Probationary<br>Faculty (First-<br>Year) - Spring<br>2025              | Open              | Academic Affairs | University Wide | Faculty | Faculty, Test | February 1, 2025 | •          |
| Faculty, Test     | Annual Faculty<br>Evaluation (NTT<br>Faculty) - Spring<br>2025                            | TEST Annual<br>Faculty Evaluation<br>(NTT Faculty) -<br>Spring 2025                               | Open              | Academic Affairs | University Wide | Faculty | Faculty, Test | February 1, 2025 | •          |
| Faculty, Test     | Annual Review -<br>Probationary<br>Faculty - (Third-<br>Year Straw Poll) -<br>Spring 2025 | TEST Annual<br>Review -<br>Probationary<br>Faculty - (Third-<br>Year Straw Poll) -<br>Spring 2025 | Open              | Academic Affairs | University Wide | Faculty | Faculty, Test | February 1, 2025 | •          |
| Faculty, Test     | Promotion for<br>Non-Tenure Track<br>Faculty - Spring<br>2025                             | TEST Promotion<br>for Non-Tenure<br>Track Faculty -<br>Spring 2025                                | Open              | Academic Affairs | University Wide | Faculty | Faculty, Test | January 13, 2025 | •          |

There are options to Export the Submissions Table view as a CSV file, and the Department Chair/School Director can use the filtering options provided by Column headers to narrow the Submissions displayed and run a Bulk Download of all these reviews.

| Dates below are disp | laying in US/Central.  |  |          |                  |                 |           |               |                      |         |
|----------------------|--|--|----------|------------------|-----------------|-----------|---------------|----------------------|---------|
| Filters: None        | $\bigcirc$   | $\bigcirc$   | $\frown$ |                  |                 | $\frown$  |               |                      |         |
| CANDIDATE -          | TEMPLATE   | SCHEDULE   | STATUS   | COLLEGE -        | DEPARTMENT -    | STEP -    | REVIEWER -    | DUE DATE -           | ACTIONS |
| Bearkat, Sammy       | Test Tenure<br>and/or Promotion<br>(duplicate)   | Test 1 Tenure<br>and/or Promotion<br>Review - Spring<br>2023                                       | Closed   | Academic Affairs | University Wide | Completed | Owen, Eric    | October 16, 2022     | •       |
| Bearkat, Sammy       | Test Tenure<br>and/or Promotion  | Test 1 Tenure<br>and/or Promotion<br>Review - Spring<br>2023                                       | Closed   | Academic Affairs | University Wide | Completed | Owen, Eric    | October 10, 2022     | •       |
| Faculty, Test        | Annual Faculty<br>Evaluation System<br>(FES) Review<br>(T/TT Faculty) -<br>Spring 2024 | Schedule Annual<br>Faculty Evaluation<br>System (FES)<br>Review (T/TT<br>Faculty) - Spring<br>2024 | Closed   | Academic Affairs | University Wide | Completed | Test, Bearkat | November 9,<br>2023  | •       |
| Faculty, Test        | Post-Tenure<br>Review - Spring<br>2024   | Schedule Post-<br>Tenure Review -<br>Spring 2024   | Closed   | Academic Affairs | University Wide | Completed | Owen, Eric    | November 11,<br>2023 | •       |
| Faculty, Test        | Annual Faculty<br>Evaluation (NTT<br>Faculty) - Spring<br>2025                         | TEST Annual<br>Faculty Evaluation<br>(NTT Faculty) -<br>Spring 2025                                | Open     | Academic Affairs | University Wide | Faculty   | Faculty, Test | February 1, 2025     | •       |

4. To open a current review process, go to the Workflow Tasks and click on the Name of a review within the Inbox.

| Activities Manage Data Reports   | Workflow <del>-</del>               |                 |               |                          |                                 |  |  |
|--|-------------------------------------|-----------------|---------------|--------------------------|---------------------------------|--|--|
| Workflow Tasks   |                                     |                 |               |                          |                                 |  |  |
| Keep track of outstanding tasks in your inbox, and view your review history. |                                     |                 |               |                          |                                 |  |  |
| / Inbox (2)  |                                     |                 |               |                          |                                 |  |  |
| ► Show Filters (0)   |                                     |                 |               |                          |                                 |  |  |
| NAME 👻   | STEP -                              | DEPARTMENT -    |               | DUE DATE 🎝 👻             | DATE RECEIVED -                 |  |  |
| TEST Promotion for Non-Tenure Track Faculty -<br>Spring 2025                 | Department Chair/School<br>Director | University Wide | Faculty, Test | April 1, 2025 @ 11:59 PM | November 19, 2024 @<br>11:40 AM |  |  |
| TEST Probationary Faculty (First-Year) - Spring<br>2025                      | Department Chair/School<br>Director | University Wide | Faculty, Test | May 1, 2025 @ 11:59 PM   | December 9, 2024 @ 9:5:<br>AM   |  |  |

5. In the Department Chair/School Director step, the first section will contain the Faculty's Review Portfolio, with all reports, entries, and links to uploaded files, as well as the Tenure Unit Standard year requested for the evaluation.

| Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM<br>Candidate: Test Faculty<br>copy of your current vita.  | <b>Actions</b> |  |
|--|----------------|--|
| Vita<br>Ast Updated<br>Asymptotic 27th, 2024 at 11:19 AM   |                |  |
| CV Upload  |                |  |
| First-Year Review Narrative  |                |  |
| Use the space below to upload a narrative file to be considered for your first-year<br>review.<br>Alternatively, you may input your narrative directly into the text box below.  |                |  |
|  |                |  |
| First-Year Review Narrative Upload   |                |  |
| First-Year Review NarrativeTest Faculty 2024.pdf (252.83 K8) First-Year Review Narrative (99,999 character limit) Lorem ipsom teroff sit amet. Cum dolor suscipit sit autem saepe et labore then est   |                |  |
| First-Year Review NarrativeTest Faculty 2024.pdf (252.83 K8)<br>First-Year Review Narrative (99,999 character limit)<br>Lorem ipsign ford sti amer. Cum dolor suscipit sti autem saepe et labore unit, est<br>dogle model and staliquam sequit in group accusation. At neme autem hic<br>treat consequentur et laborum aspernatur que eaque laborum sit sunt voluptatem<br>qui rerum periam. Ex evite officiis qui accusamus recusandae 33 exercitationem<br>corporis non autem facilis.   |                |  |
| First-Year Review NarrativeTest Faculty 2024.pdf (252.83 K8) First-Year Review Narrative(99,999 character limit) Lorem (segue for Set amet. Cum choir suscipit sit autem sappe et labore time, est dogramable impedite st aliquum segue in guos accusantium. At nemo autem hic profix consequenture t laborum aspernatur que eque laborum sit sunt voluptatem qui rerum apriam. Exel (Fifficis qui accusantius recurande 33 exercitationem qui erum apriam. Exel (Fifficis qui accusantius recurande 33 exercitationem qui erum apriam. Exel (Fifficis qui accusantius recurande 33 exercitationem qui erum apriam. Exel (Fifficis qui accusantius recurande 33 exercitationem |                |  |



|    | Activities Manage Data Reports Workflow -  |  |
|----|--|--|
|    | Comparison Com<br>Comparison Comparison Comp | CANCEL Actions ~                                       |
|    | Candidate: Test Faculty  |  |
|    | First-Year Review Portfolio Documents  |  |
|    | Use the space below to upload documents to be considered for your first-year<br>review. The reports below are generated from the data entered in Achities. A<br>document upload field has also been provided to include any supporting documents<br>needed to complete your review portfolio.  |  |
|    | Note: The report will not automatically refresh when the Activities data is<br>changed. You <u>must</u> refresh the report in Workflow. The report will be date and<br>time stamped with the latest refresh date.  |  |
|    | Reports By Academic Year   |  |
|    | Review Activity Report for Academic Year 2024-2025   |  |
|    | Last Updated<br>November 27th, 2024 at 11:40 AM  |  |
| D3 | Upload any other Supporting Documents (e.g., support letters, etc.)  |  |
|    | TEST FACULTY_IDEA Teaching Essentials Reports zip (541.85 KB)  | Letter of Support Nov2024.pdf (157.06 KB)              |
|    | Teaching Librarianshio Test Faculty 2024.docx (83.68 KB)   | Supporting Documents Test Faculty 2024.docx (83.68 KB) |

6. The second and final section is the Department Chair/School Director step which contains a field with the department chair's input for the First-Year Annual Review, as either a file upload at the appropriate location, or a text area box for direct feedback on the performance of the probationary faculty member.

| Activities Manage Data Reports Workflow -   |  |
|---|--|
| Compartment Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM   | C Open       ×         ← → < ↑       ▲       ≪ Wor → Tenure & Promotion Do →       ∨       ▷       Search Tenure & Promotion D , 戶                                 |
| Candidate: y Test Faculty   | Organize 🕶 New folder  |
|   | ORCID Name Date modifie  |
| Department Chair/School Director First-Year   | Publication import fil<br>SHSU Faculty Informa<br>BLST FACULTY_UDEA reaching essentials Reports.aip<br>11/26/2024 8  |
| Review Feedback   | SHSU Watermark Fac   |
| The contents of this form constitute the Department Chair/School Director's feedback for<br>faculty members during their first-year annual review evaluation. | Taining Documents Undergraduate Refa Watemark Fadito A TEST FACULTY_IDE Areching Essentials (2016), Spring2. T11/12/2024 8   |
| The due date for your submission is no later than May 1, 2025, at 11:59 p.m.  | Watermary Reports ATEST FACULTY_IDEA Teaching Essentials (2016)_Fall2023 11/18/2024 8<br>TEST FACULTY_IDEA Teaching Essentials (2016)_Summe 11/18/2024 8           |
| Please use the space below to upload the Department   | Workflynn  Letter of Support Nov2024.pdf  11/18/2024 8  FEF Forms 2022  TEST FACULTY IDEA Teaching Essentials (2016) Spring2 11/18/2024 8                          |
| Chair/School Director's feedback to the faculty member.   | FEF Forms 2022 I TEST FACULTY_IDEA Teaching Essentials (2016)_Spring2 11/18/2024 8 Spr 2025 Workflow Dean Recommendation Letter Test Faculty 2024.pdf 11/12/2024 7 |
| Alternatively, you may input your feedback directly into the text box below.  | Tenure & Promotior +   |
| Once you have completed the required fields below, click on "Actions" and select<br>"Submit" to complete the review process.                                  | File name: Dept Chair 1st year Feedback Test Faculty 2C 🗸 All files (*.*) 🗸  |
| Department Chair/School Director feedback   | Upload from mobile Open Cancel   |
| Department Chair/School Director feedback   | ]  |
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| ctivities | Manage Data   | Reports          | Workflow 🔻                 |   |                    |              |      |        |         |  |
|-----------|---|------------------|----------------------------|---|--------------------|--------------|------|--------|---------|--|
| Depar     | rtment Chair/Sch                                      | ool Directo      |                            | ay 1st, 2025 @ 1                                    | 1:59 PM            |              | *    | CANCEL | Actions |  |
| Candida   | ate: Test Faculty                                     | below to u       | pload the Depart           | ment  |                    |              |      |        |         |  |
| Cha       | air/School Directo                                    | r's feedbacl     | to the faculty m           | ember.  |                    |              |      |        |         |  |
| Alter     | rnatively, you may input y                            | our feedback di  | rectly into the text box I | below.  |                    |              |      |        |         |  |
|           | e you have completed the<br>bmit" to complete the rev |                  | below, click on "Actio     | ons" and select                                     |                    |              |      |        |         |  |
|           |   |                  |                            |   |                    |              |      |        |         |  |
|           | Department Chair/Sch                                  | iool Director fe | edback                     |   |                    |              | <br> |        | ·       |  |
|           |   |                  |                            | Drop file   | s here or click to | upload       |      |        |         |  |
|           | Dept Chair 1  | st vear Feedbar  | k Test Faculty 2024.pd     | if (333.21 KB)                                      | â                  |              |      |        |         |  |
|           |   | ,                |                            |   |                    |              |      |        |         |  |
|           | `   |                  |                            | <u> </u>  |                    |              | <br> |        | /       |  |
|           | Department Chair/Sch                                  |                  |                            |   |                    |              |      |        |         |  |
|           | BiU   | 9  ▼ = ▼ 3       | • 🖃 • 🖻                    | ⊡ © ⊞ ∽   |                    |              |      |        |         |  |
|           | Ä   |                  |                            |   |                    |              |      |        |         |  |
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|           |   |                  |                            | tem hic dolor consequui<br>qui rerum aperiam. Ea    |                    | \            |      |        |         |  |
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|           |   |                  |                            | dolores quo atque sequ                              |                    |              |      |        |         |  |
|           |   |                  |                            | met vitae ex asperiores<br>m quia ut laboriosam off |                    |              |      |        |         |  |
|           | neque nulla qui vero                                  | voluptates.      |                            |   |                    |              |      |        |         |  |
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|           | dicta totam et volupta<br>voluptates distinctio a     |                  |                            | uia quis. Vel quia labore                           | aut                |              |      |        |         |  |
|           |   |                  | ····                       | Ottaracter  | s : 873/99999      |              |      |        |         |  |
|           |   |                  |                            | Sharacter   | 3.010/33333        |              |      |        |         |  |

7. Once completed, the Department Chair/School Director can select from the Actions drop-down menu, Save Draft to keep your work and return later, to the Submit to Faculty Records to move the review process along, or Send Back to the Previous Step (which should only be done in consultation with the Faculty Records Office.) Once you Submit to Faculty Records click Yes on the following popup box.

| Activities Manage Data Reports Workflow -  |  |
|--|--|
| Comparison of the second       | CANCEL Actions  CANCEL  Actions    Save Draft  Submit to Faculty Records  Send Back to Previous Step |
| Department Chair/School Director feedback Drop-files here or click t Drop-f | o.uokaad   |
| Department Chair/School Director feedback         B       j       U       ¶ + ⇒ → ⊨ + ⊨ + ⊨ + ⊨ → ⊨ ⇒ ⊡       ⊡       ©       I → ∞         Loren ipsum dolor sit amet. Cum dolor suscipit sit autem saepe et labore enim est doloremque impedit est aliquam sequi n quos accusantium. At nemo autem hic dolor consequentur et laborum aspenatur quo eaque laborum sit sur vivilytathem qui errum aperiama. Ea veit officia qui accusamus recusandae 33 exercitationem corports non autem facilis.         Ea tempore omnis sit voluptatibus recusandae aut voluptas dolores quo atque sequi hic expedita auscipit ea dicla cuipa eos molestate dolores. Et amet vitae ex asperiores magnam ut dolor eveneti et ve molestae adaposit un eque errori Est psam qui aut aborosam officiis non neque nulla qui vero voluptates.         Eum corporis fuga non corrupti ure qui eluis incidunt. Qui quee cupditate aug sobula dolor gi voluptates delinctio aut galaisum togati y cupadit qui quos vei qui adamos augit voluptates delinctio aut galais more autori platen uncedit qui qui agui sobore autor voluptates delinctio auto aalisum losam.   |  |



| Activities Manage Data Reports Workflow -   |                               |
|---|-------------------------------|
| < Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM  | Actions ~                     |
| Candidate: Test Faculty<br>racuity memoers during their first-year annual review evaluation.  | Select to expand Actions menu |
| The due date for your submission is no later than May 1, 2025, at 11:59 p.m.  |                               |
| Please use the space below to upload the Depart<br>Chair/School Director's feedback to the faculty m<br>Alternatively, you may input your feedback directly into the text box t<br>Once you have completed the required fields below, elick on "Actio   |                               |
| "Submit" to complete the review process.  |                               |
| Department Chair/School Director feedback   |                               |
| Drop files here or click  |                               |
| Dept Chair 1st year Feedback Test Faculty 2024,pdf (333.21 KB)  |                               |
|   |                               |
| Department Chair/School Director feedback   |                               |
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| Ea tempore omnis sit voluptatibus recusandae aut voluptas dolores quo atque sequi hic<br>expedita suscipit ea dicta culpa eos molestiae dolores. Et amet vitae ex asperiores magnam ut<br>dolor eveniet vet molestiae adipisci ut neque errort Est Ipsam quia ut laboriosam officiis non<br>neque nulla qui vero voluptates.                                      |                               |

8. Once the Department Chair/School Director has completed their submission to Faculty Records, the process will be moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are available – with Recall only taking place prior to the submission due date or following consultation with the Faculty Records office.

| Activities  | Manage Data                                 | Reports            | Workflow 👻          |              |                                  |          |
|---|---|--------------------|---------------------|--------------|----------------------------------|----------|
| Workflow Tasks Keep track of outstanding tasks in your inbox, and view your review history. |   |                    |                     |              |                                  |          |
| Keep track of ou  | itstanding tasks in your                    | inbox, and view y  | our review history. |              |                                  |          |
| Inbox (1)   |   |                    |                     |              |                                  |          |
| History (10   | ))  |                    |                     |              |                                  |          |
| NAME  |   |                    | CURRENT STEP -      | CANDIDATE    | DUE DATE                         | ACTIONS  |
| TEST Tenure   | and/or Promotion Revie                      | w - Spring 2025    | Dean                | Test Faculty | February 25, 2025 @ 11:59 PM     | •        |
| TEST Annual<br>2025   | Faculty Evaluation (NTT                     | Faculty) - Spring  | Faculty             | Test Faculty | February 1, 2025 @ 11:59 PM      | •        |
|   | Faculty Evaluation Syste<br>) - Spring 2025 | em (FES) Review    | Faculty             | Test Faculty | February 1, 2025 @ 11:59 PM      | •        |
| TEST Probatio   | onary Faculty (First-Yea                    | r) - Spring 2025   | Faculty Records     | Test Faculty | May 31, 2025 @ 11:59 PM          | ·        |
| Test Spring 2   | 023 Annual Review - Pro                     | obationary Faculty | Completed           | Me           | September 20, 2022 @ 11:59<br>PM | Recall   |
|   | y Evaluation System (FE<br>ure-track) (DEMO | S) Review          | Completed           | Me           | May 1, 2023 @ 11:59 PM           | Download |
| Test Annual R<br>(Alternate DP  | leview - Test Accounts (<br>TAC)            | 2nd test)          | Completed           | Me           | October 8, 2022 @ 11:59 PM       | · ·      |