SHSU Watermark Workflow
Probationary Faculty 2nd, 4th, and 5th Year Process Help Guide

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

Email Messages

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

Dear Test Faculty,

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

Process: TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025

Due Date: Saturday, February 1, 2025 11:59 PM CST

In accordance with APS 900417, probationary faculty members must upload a complete Faculty Review Portfolio in Watermark Faculty Success by the due date. Please reference the training resources 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.**

SUBMIT REVIEW MATERIALS

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

https://www.digitalmeasures.com/login/shsu/faculty/app/
workflow/submissions/92b2d884-dd71-4499-b4c8-d7da0ebeed10/
step/84858223-644c-4bb9-bad9-af3037a51efa/assignee/2390354?
embed=workflow:assignee,workflow:subject,workflow:
response&subProcessId=815828d5-82fc-4658-9f10-
690d807faea9&orgId=1660&personId=2390354

The Next step with faculty involvement will be the Departmental Promotion and Tenure Advisory Committee (DPTAC) step. Once a faculty member submits their materials to Start a Portfolio Evaluation, the Faculty Records office will validate the submission and move it to the next step in Watermark Workflow where DPTAC members and the DPTAC chair will receive an automated email:

Dear Member DPTAC,

The following submission is now ready for your review:

Process:	TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025
Candidate:	Test Faculty
Due Date:	Tuesday, April 1, 2025 11:59 PM CDT

In accordance with APS 900417, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. Please reference the training resources 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 DPTAC Chair for the faculty member. The due date for your submission is **no later than April 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/92b2d884-dd71-4499-b4c8-d7da0ebeed10/step/d20056d2-d16f-4027-930c-07ee645a91fd/assignee/2388404?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=815828d5-82fc-4658-9f10-690d807faea9&orgId=1660&personId=2388404

Dear Chair DPTAC,

The following submission is now ready for your review:

Process:	TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025
Candidate:	Test Faculty
Due Date:	Tuesday, April 1, 2025 11:59 PM CDT

In accordance with APS 900417, the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. Please reference the training resources 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 DPTAC Chair for the faculty member. The due date for your submission is **no later than April 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/92b2d884-dd71-4499-b4c8-d7da0ebeed10/step/d20056d2-d16f-4027-930c-07ee645a91fd/assignee/2388403?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=815828d5-82fc-4658-9f10-690d807faea9&orgId=1660&personId=2388403

The final review step will be the Department Chair/School Director. Once the DPTAC chair submits the DPTAC written summary for a review process in Watermark Workflow, the Department Chair/School Director will receive an automated email:

Dear Bearkat Test,

The following submission is now ready for your review:

Process:	TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025
Candidate:	Test Faculty
Due Date:	Thursday, May 1, 2025 11:59 PM CDT

In accordance with APS 900417, the department chair/school director shall review the performance of probationary faculty members beginning with the first year of employment. Please reference the training resources 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/92b2d884-dd71-4499-b4c8-d7da0ebeed10/step/3f77a7d6-e506-43ec-8db0-315b2b8973c0/assignee/2357490?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=815828d5-82fc-4658-9f10-690d807faea9&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

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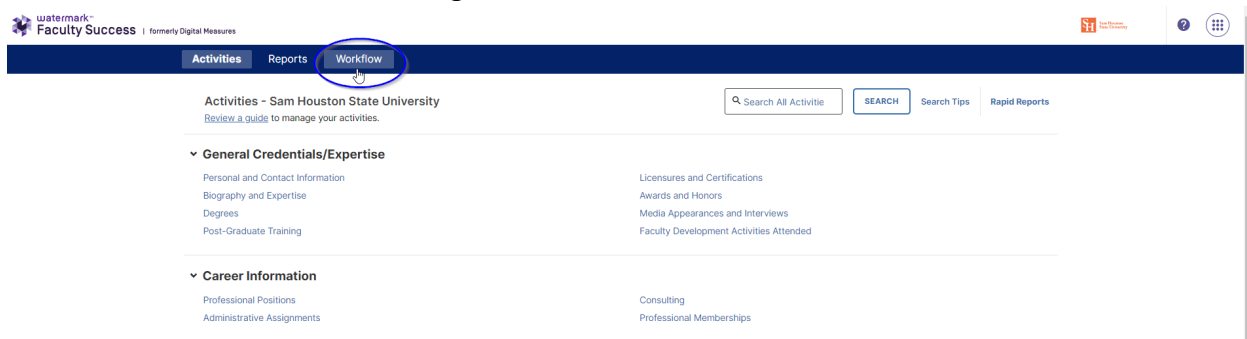
4. Select an item from Workflow Task Inbox to enter your step in the process.

Watermark Workflow 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.)

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.

3. The **History** section will show a list of previous Watermark reviews. The Column headers are similar to 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.

Last Updated 12/10/2024

Watermark Workflow Probationary Faculty (2nd, 4th, and 5th year) Review Process Steps

Faculty Step

4. Under the Workflows Tasks Inbox click on Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025 to begin entering your portfolio.

5. 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).
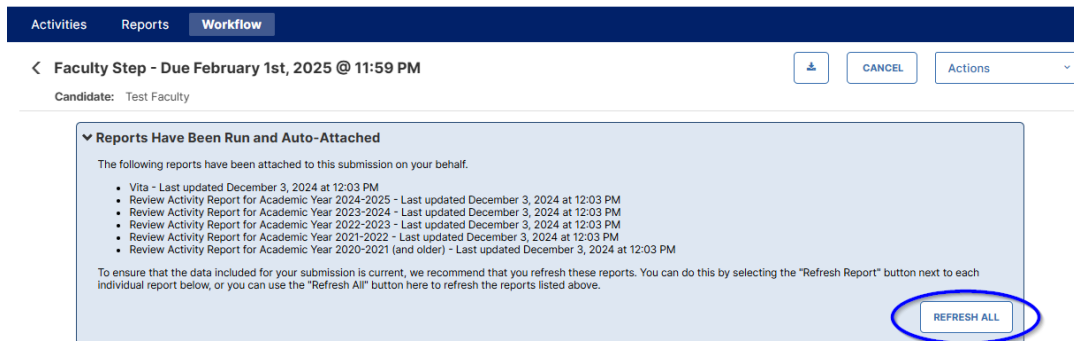
6. When working on your Third-Year review portfolio, click on the **"Actions"** button in the upper right and select "**Save Draft**" until your submission form is complete. You must click "Save Draft" to retain any entered or updated information if you wish to work on your review portfolio entries across several sessions logging into your Watermark account. If you close your browser window without saving, your work will not be retained.

7. Once you have completed your review portfolio, you should now click on "**Actions**" and select "**Submit to Department Promotion and Tenure Advisory Committee** " to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded **will not be saved.**

8. **Note: you will see the due date for your submission – in the case of the Probationary Faculty (2nd, 4th, 5th year), it is no later than February 1, 2025, at 11:59 p.m.**

9. 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.

10. Probationary 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.

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

12. 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.
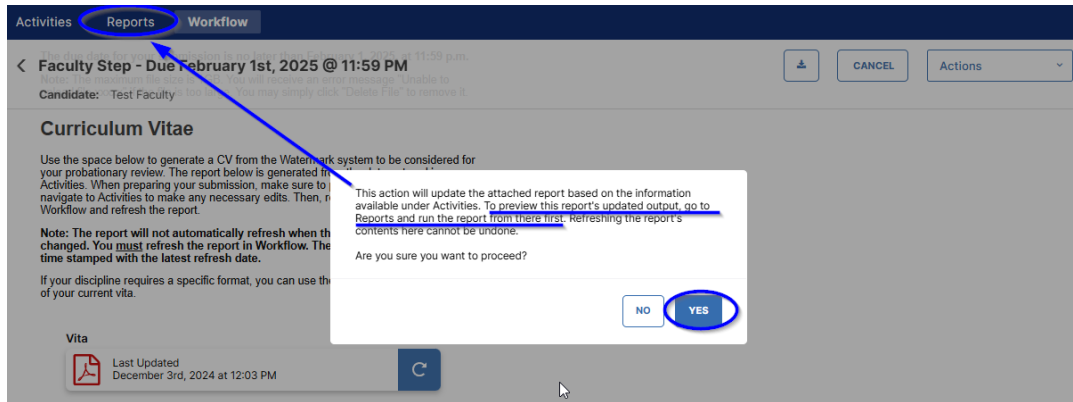
Once you have clicked Yes on the Vita Refresh popup window you will see the Last Updated date and time change.

13. Alternatively, you may upload or drag and drop files into the CV Upload area – any file type can be used.
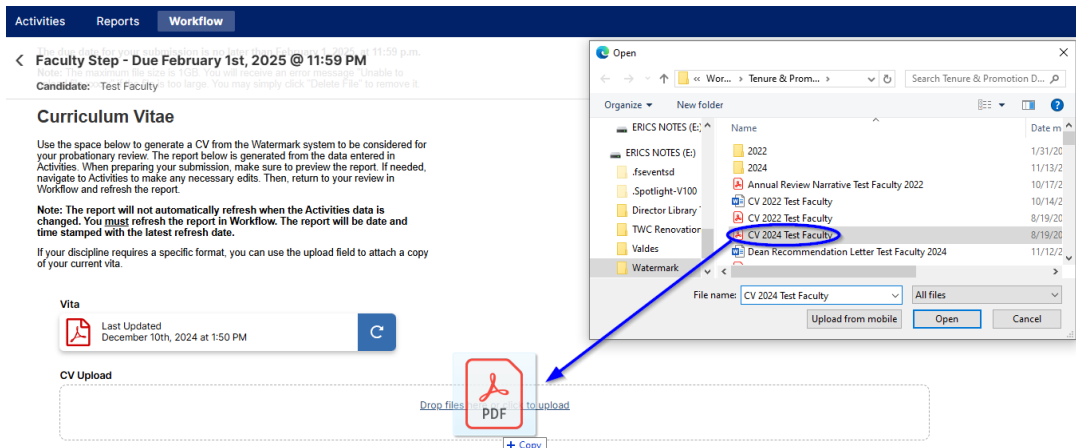
14. You can delete any files you have uploaded by mistake by clicking the trash can icon to the right of the file name.
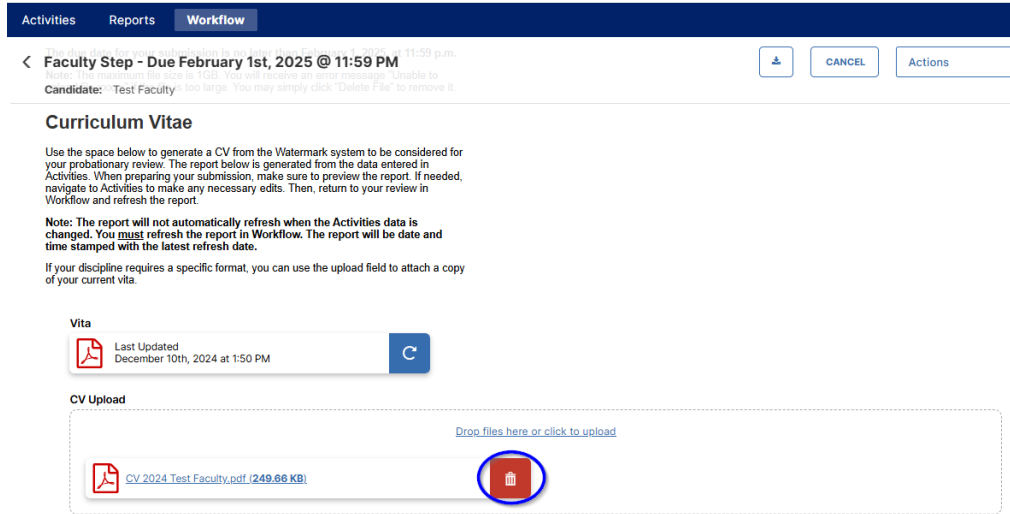
15. The next section of the Probationary Review Portfolio is a section for including a review narrative. This is an optional step, and can be done either by uploading a file to the Annual Review Narrative Upload location, **OR** manually enter / cut and paste a narrative directly into the Text Box provided. The Text Box has a limited of just under 100,000 characters.
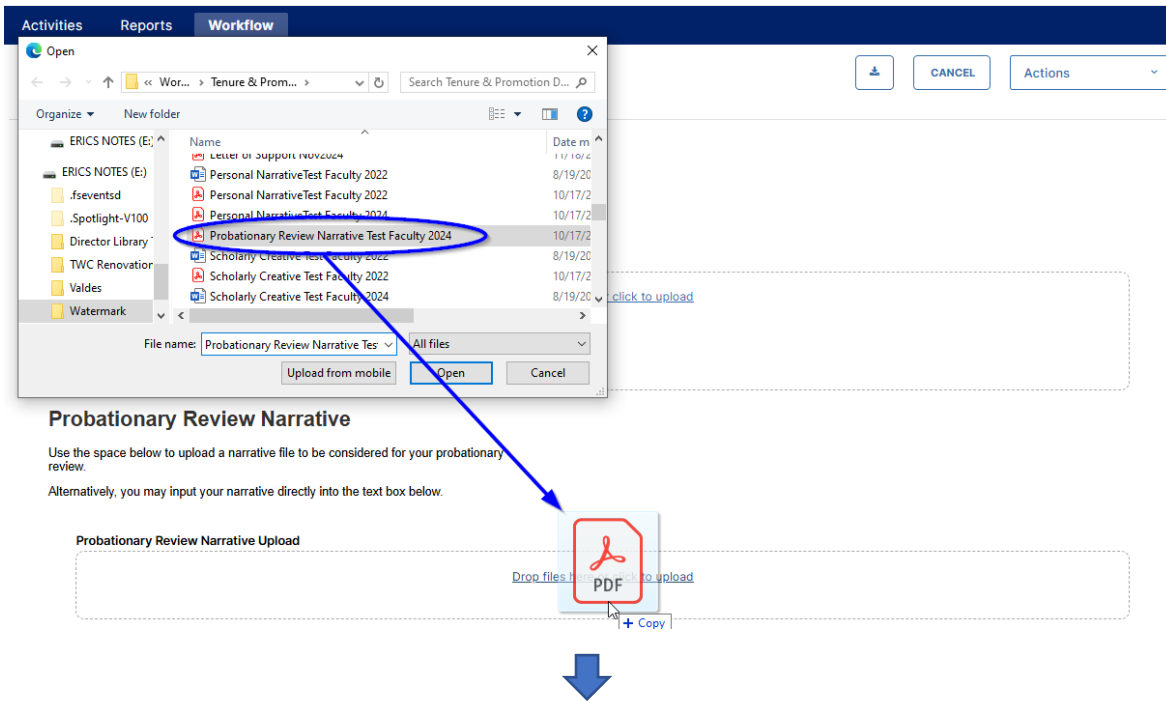
16. After the Probationary Review Narrative is a required field used to convey to the reviewers which approved tenure unit standard you wish to be used for this evaluation. The field asks you to enter the Year of the approved standard. You can review the guidelines for selecting the tenure unit standard within APS 900417 (Faculty Reappointment, Tenure, and Promotion of Tenured and Tenure-Track Faculty), Section 5.03 for more details. Your department will maintain copies of previous tenure unit standards.
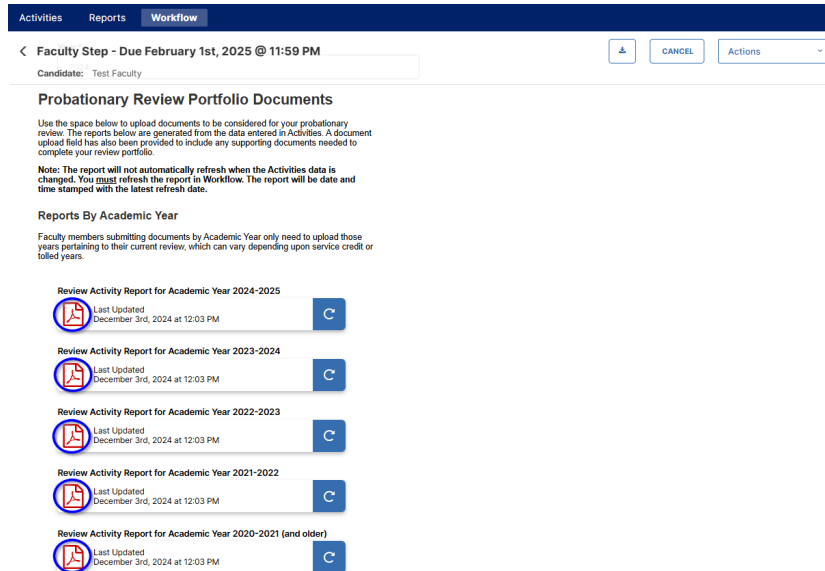
17. The final section of the Faculty Step is the Probationary Review Portfolio Documents area. This section provides several Review Activity Reports generated from your Activities records based upon Academic Years (these reports yearly dates range will span from September 1st until the following August 31st). These reports will not automatically refresh when the Activities data is added or changed. You must refresh
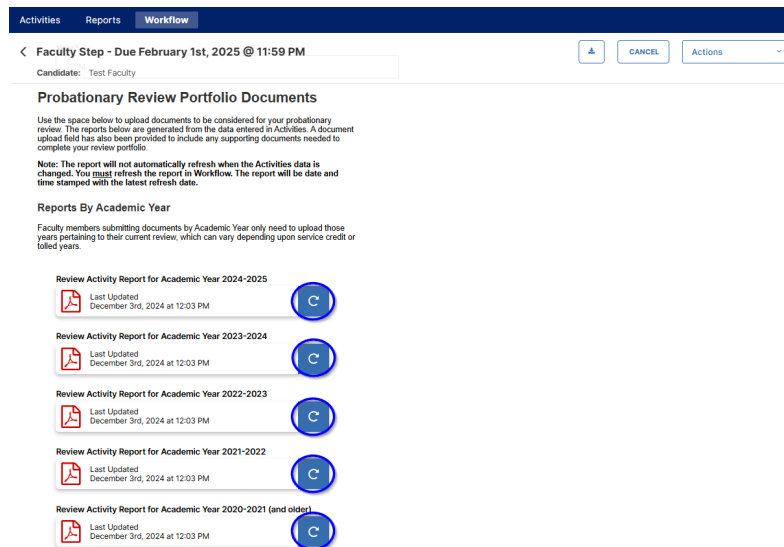
the report in Workflow reviews. Each report will be date and time stamped with the latest refresh date.

You can click on the Adobe Acrobat icon on 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.

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 on the right of each report to update the report.

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.
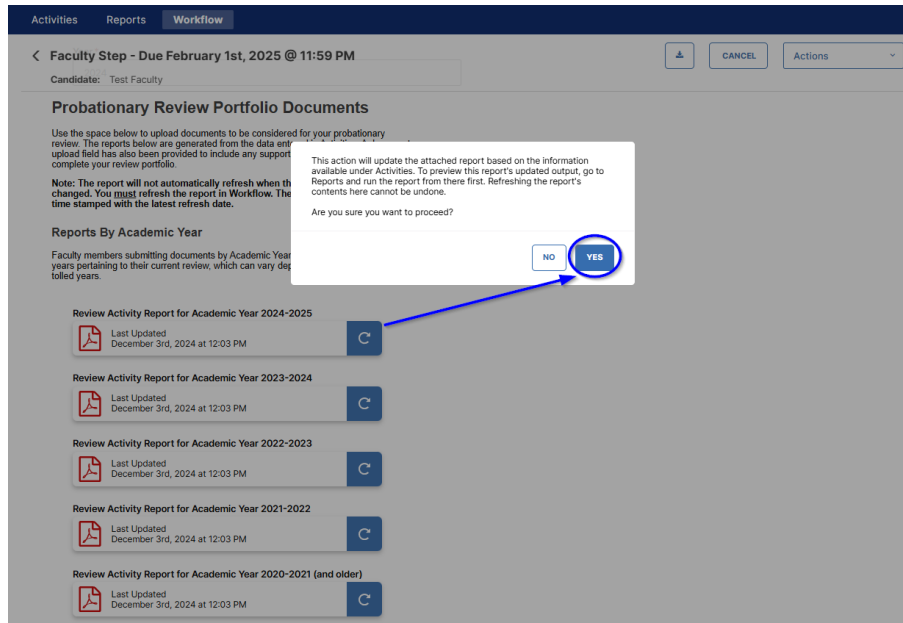
You may generate a current copy of a Review Activity Report by going to the Reports Tab and running a report with the same academic year date range being used in your portfolio documents. This will create a report in one of three file formats (MS Word, PDF, or HTML) for you to view before refreshing the version in your review portfolio.
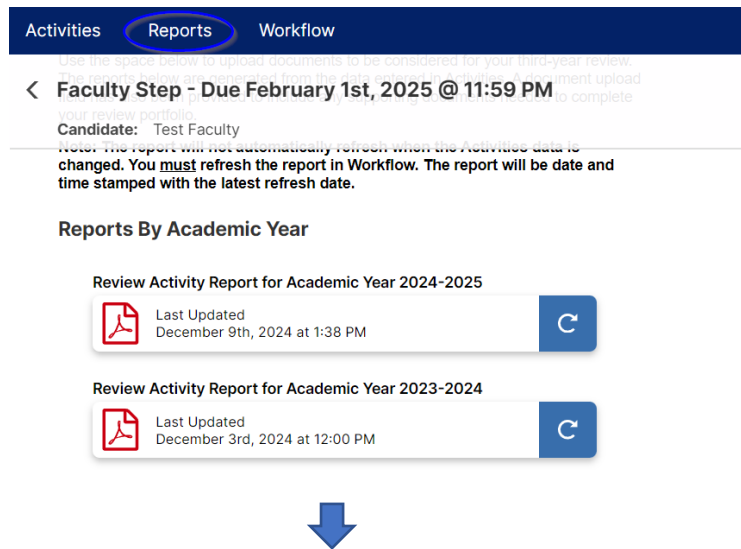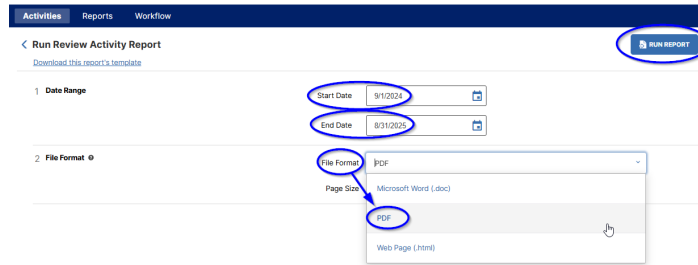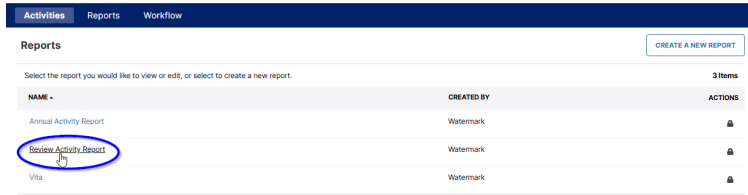
18. In addition to the Review Activity Reports generated from your Activities database entries, there is also an area where you may upload or drag and drop files with any other Supporting Documents for your review portfolio – any file type can be used. **This is the best location to add any IDEA Qualitative Reports that will be used in your evaluation.**
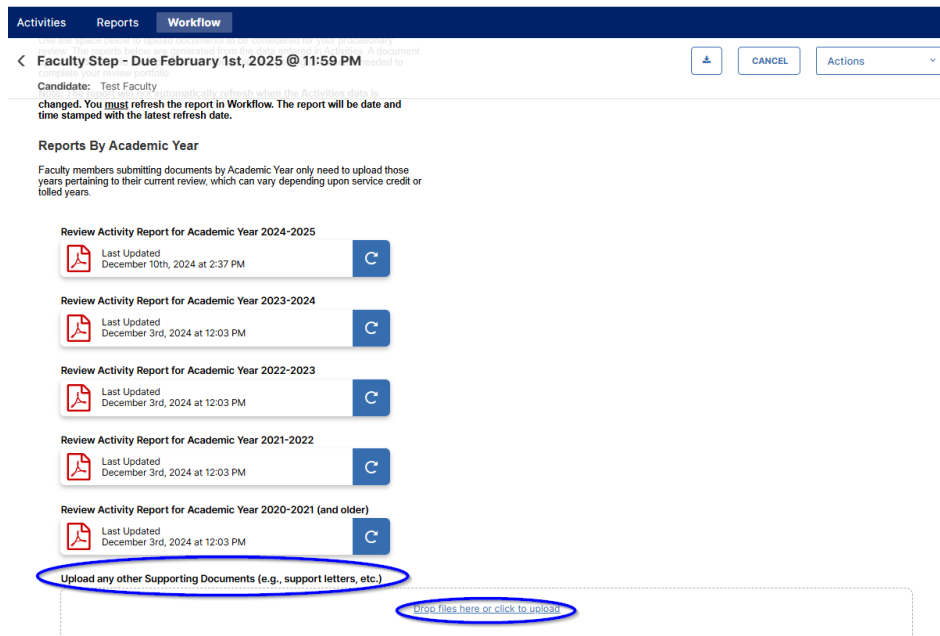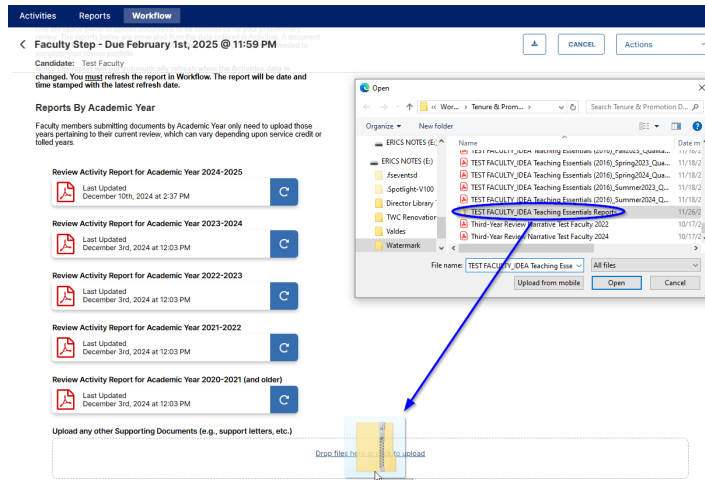
Note: Your materials will be displayed to reviewers exactly as they appear on your faculty submission page. Files uploaded within each of the upload fields will appear in two columns, moving from left to right, then top to bottom.
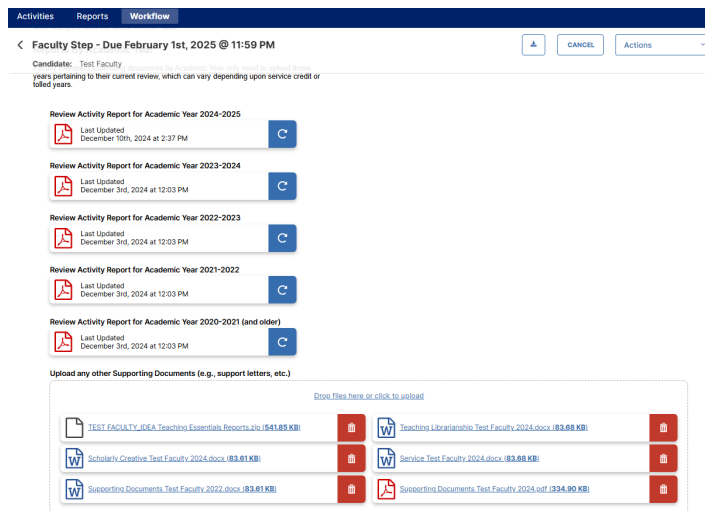
If you wish to provide files appearing in folders and subfolders, you are encouraged to save these files and structure them using a Zip file. To create a Zip file containing the desired folder structure, you may right-click (on a PC) on the top-level folder and select Send to -> Compressed (zipped) folder. 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.

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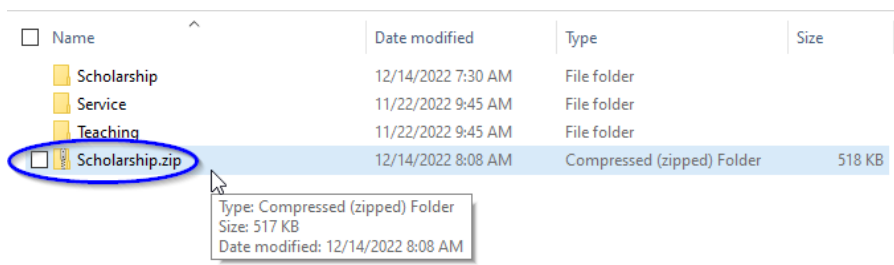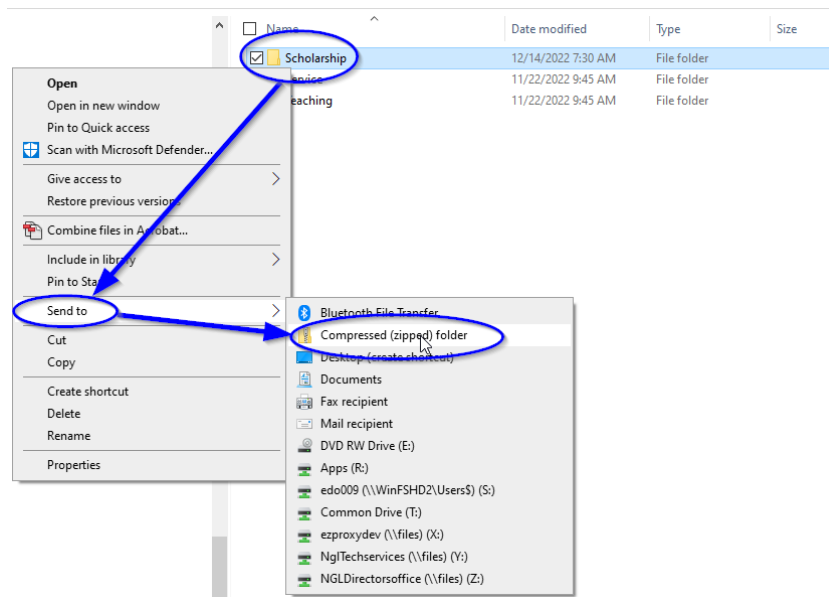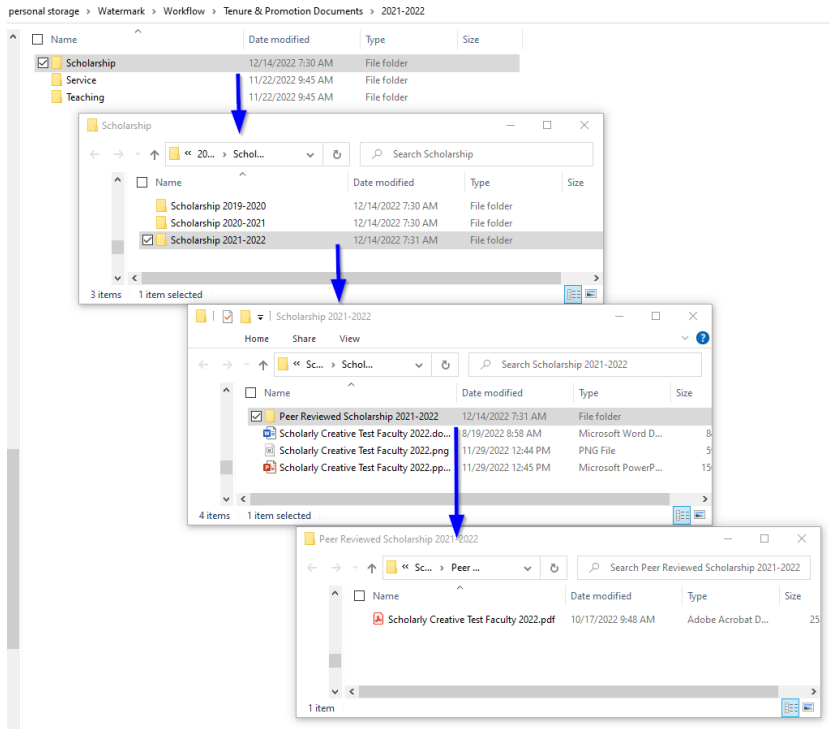
A reminder that you can click on Actions in the upper right and choose Save Draft to retain any entries and file uploads you have completed, but prior to a final submission to Start Portfolio Evaluation.
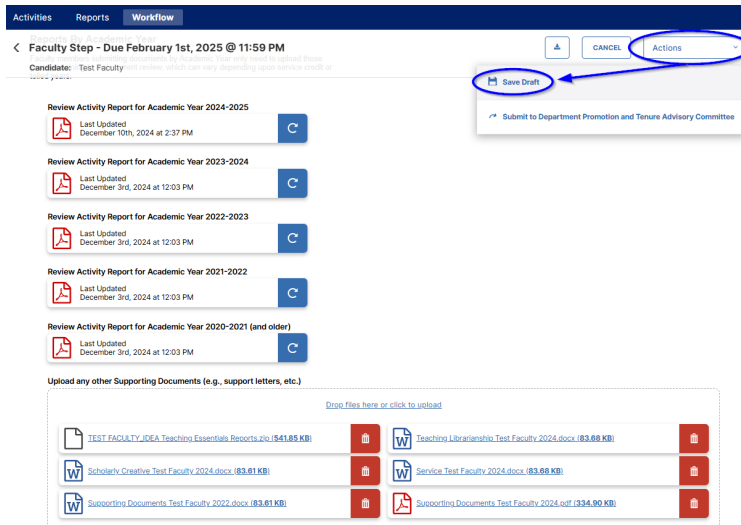
19. Once you have completed all of your entries and uploads for the Faculty Step, click on the Actions – Submit to Department Promotion and Tenure Advisory Committee and click Yes in the following popup window.
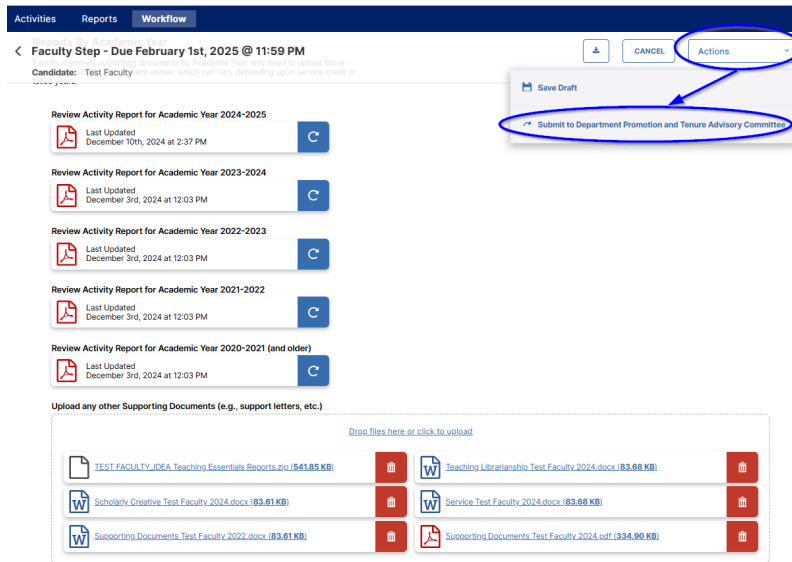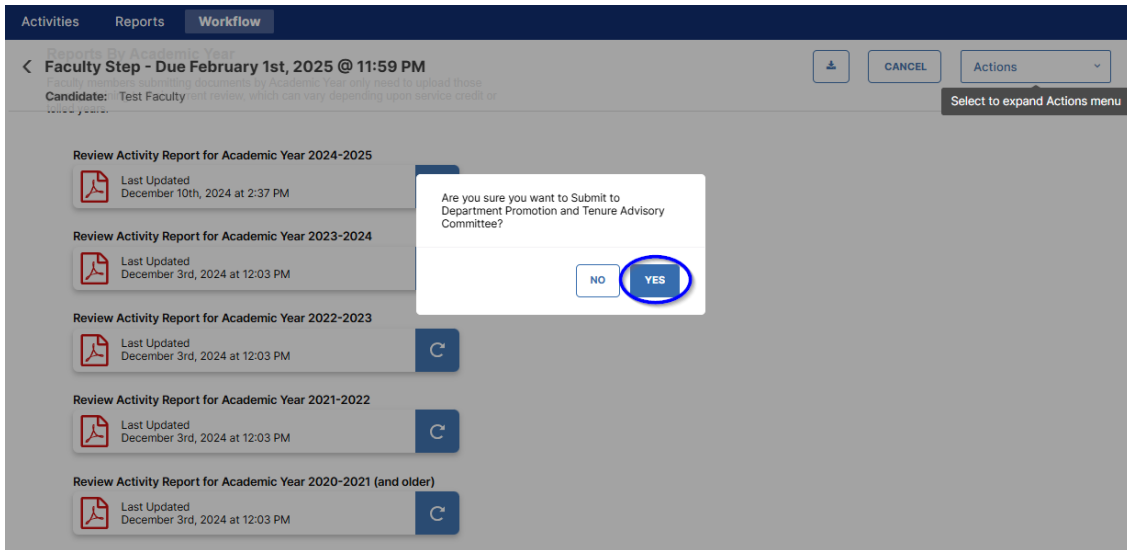
20. The Faculty Workflow Tasks screen will now show the item has moved from the Inbox to History. This screen also shows at what step of the process the submission currently resides. The Due Date shows when the next step must be completed. The Actions down arrow allows the faculty member to Recall or Download the submission. If the due date of the faculty member's submission step has not yet passed, the faculty member may recall the submission to make edits and/or add/remove documents, and then resubmit. Once the Current Step moves multiple steps beyond the user's assigned step the Recall function (while still appearing) will no longer work.

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

Department Promotion and Tenure Advisory Committee Member/Chair Step

1. For faculty members serving on a Department Promotion and Tenure Advisory Committee (DPTAC), your Workflow Tasks Inbox 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 currently awaiting your input and submission. In this example you will see TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025, currently at the DPTAC Step, in the University Wide Department, for the Candidate Test Faculty. The due date for your submission of your review step is April 1, 2025, by 11:59pm, and you received this submission available for your review at 2:58 PM on December 9, 2024.

2. Once you click on the review name, both DPTAC members and the DPTAC chair will see the first section of this step contains the candidate faculty's Review Portfolio, with all entries and links to uploaded files.

3. DPTAC members and the chair can review all reports generated from the candidate's Watermark Activities by clicking on the Adobe Acrobat icons for the Vita and Review Activity Reports as well as field entries and links to uploaded files for the CV, Personal Narrative, and Other Supporting Documents.

NOTE: The candidate's Probationary Review Portfolio will also contain the Year of the Tenure Unit Standards under which they wish to be evaluated. You can review the guidelines concerning selection of tenure unit standards within APS 900417 (Faculty

Reappointment, Tenure, and Promotion of Tenured and Tenure-Track Faculty), Section 5.03 for more details. Your department will maintain copies of previous tenure unit standards.

4. 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.

5. For the DPTAC Chair, after the Faculty Review Portfolio section, you will see a Committee Members and Responses section. This section can be viewed either By Member or By Response.
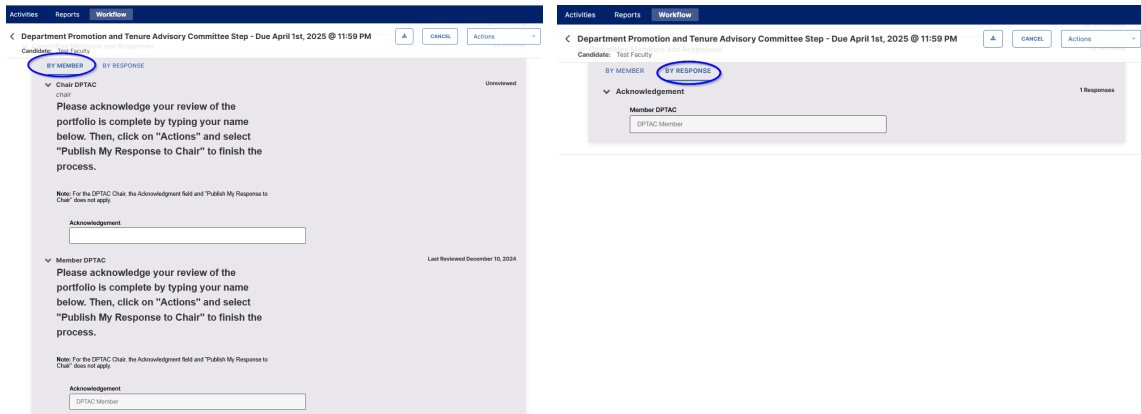
Within this area will be an Acknowledgement Text Box for the chair and each DPTAC member. The DPTAC member area shows whether or not they have completed their review of the portfolio to the right of the member's name. The status will either show as Unreviewed for those who have not published their Acknowledgement Response, or a Last Reviewed date for those members who have published their response.

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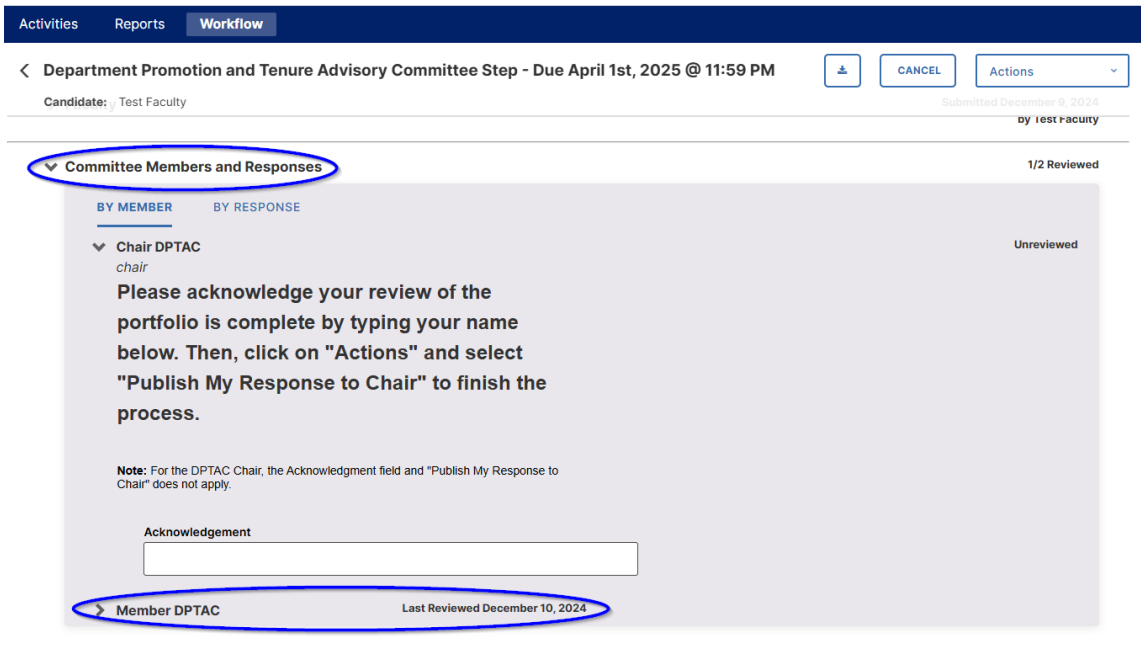
6. The remaining section of the DPTAC chair screen contains the Committee Response uploaded summary that will be submitted to the Department Chair/School Director.
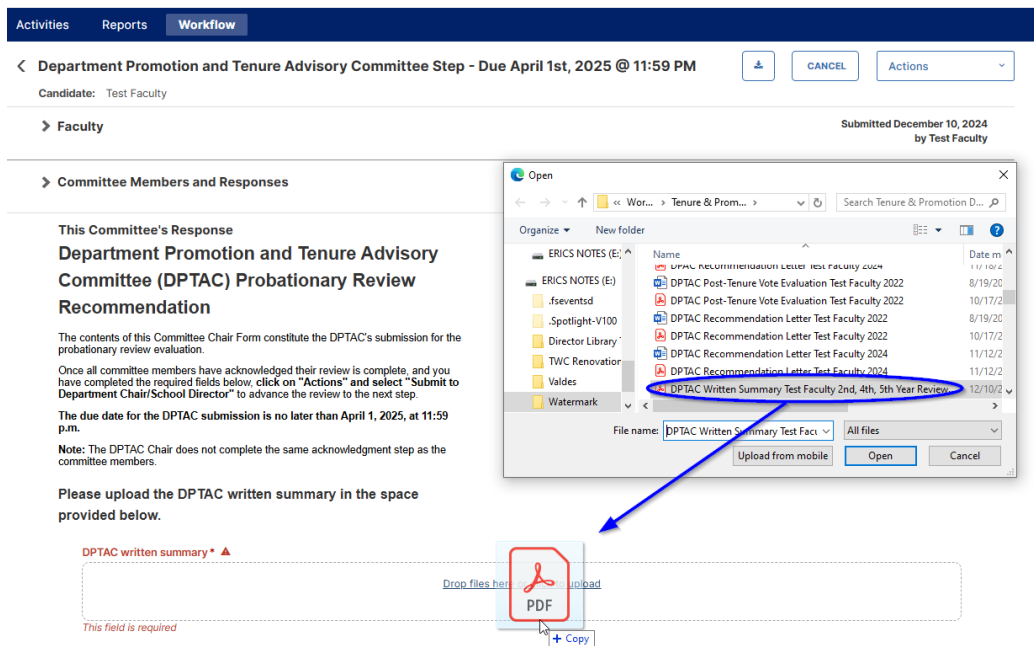
7. The DPTAC chair may choose the Save Draft option from the Actions drop-down menu at any time prior to Submitting to the Department Chair. This will also allow DPTAC members to review the Committee's Response prior to submission.
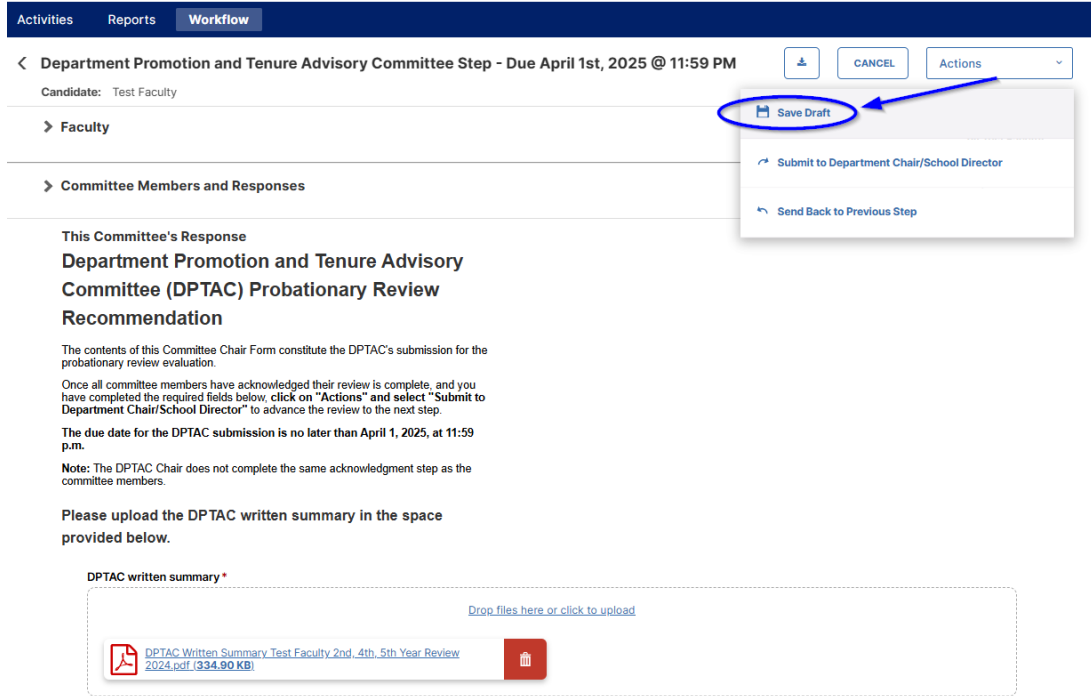
8. DPTAC members can click on the Workflow Tasks Inbox item to see any drafts saved by the DPTAC chair, which include the Recommendations and Vote Tallies as well as access to the DPTAC Recommendation Letter uploaded file.
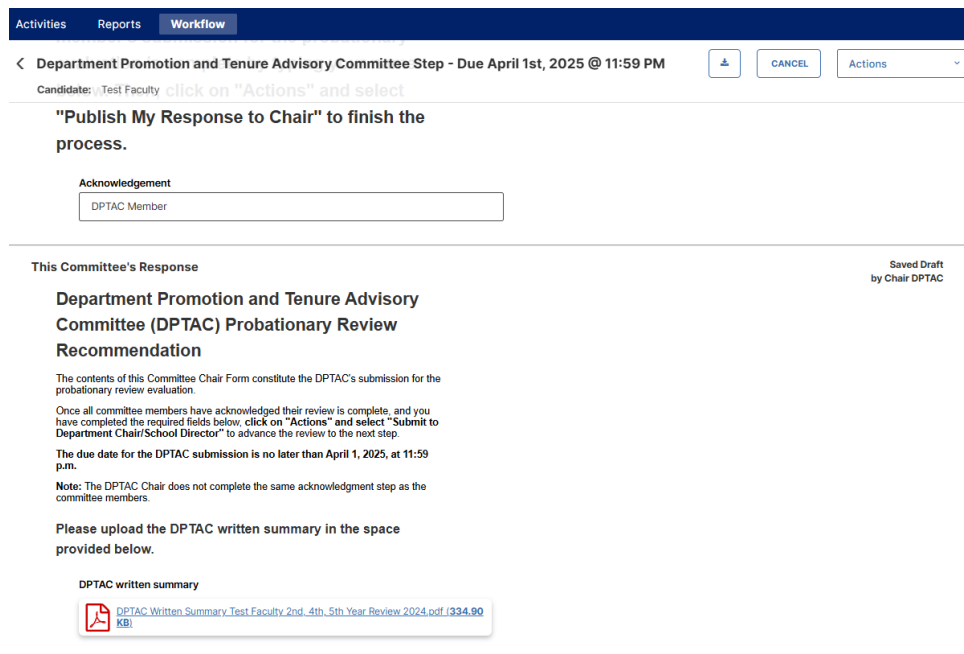
9. Once the DPTAC has conferred and feels the Committee Response is complete, the DPTAC Chair can select from the Actions drop-down menu the Submit to Department Chair/School Director option and click Yes on the following popup box.

10. There is an option for participants in later steps of the Workflow process to Send Back to Previous Step from the Actions drop-down menu. This should only be done <u>after</u> consultation with the Faculty Records Office.

11. Once the DPTAC Chair has submitted the Committee Response, the 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 available – with Recall only taking place prior to the submission due date or following consultation with the Department Chair/School Director.

Department Chair/School Director Step

1. 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.
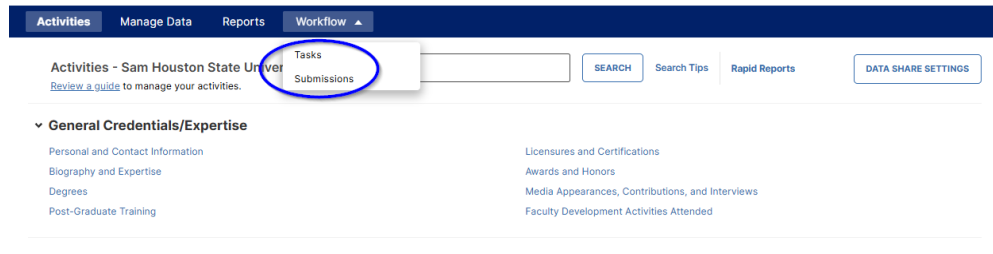
2. Current review processes waiting for the Department Chair/School Director input and submission, and historical review processes that have already received the Department Chair/School Director submissions are located in the Workflow Tasks. Workflow Tasks Inbox and History will function the same way 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.

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.

Last Updated 12/10/2024

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.

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

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. These submissions can be viewed following the same process as described in the DPTAC section on page 20 above. This is followed by the Department Promotion and Tenure Advisory Committee (DPTAC) section contains their written summary.
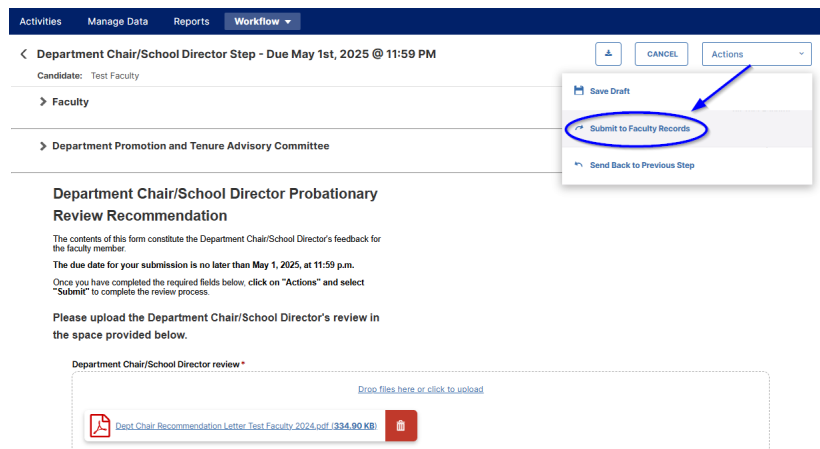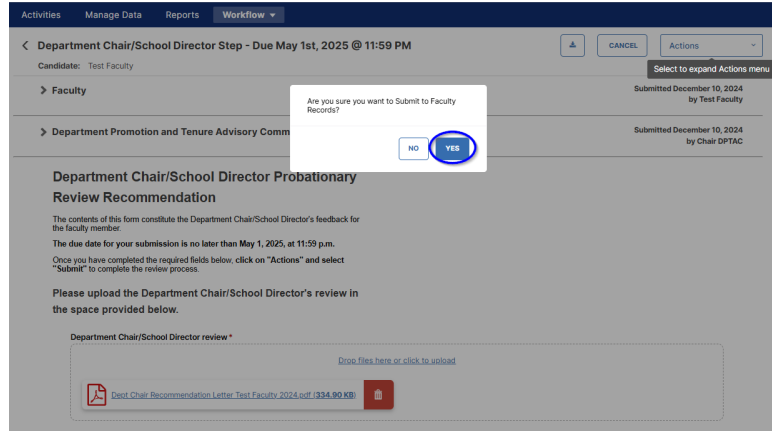
6. The final section for the Department Chair/School Director step contains the required file upload containing the department chair's review recommendation for the probationary faculty member.
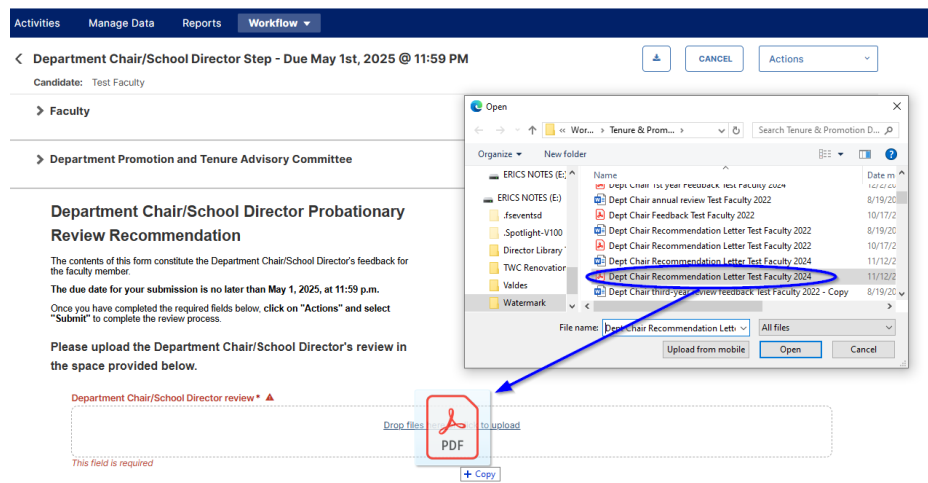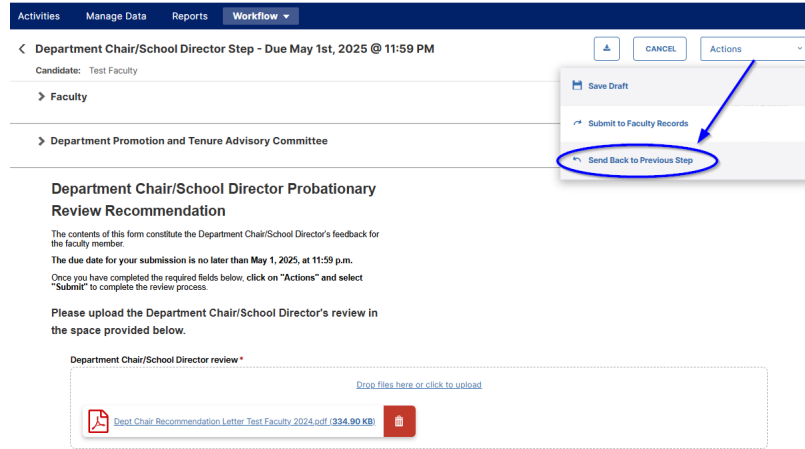

7. Once completed, the Department Chair/School Director can select from the Actions drop-down menu to the Submit to Faculty Records option and click Yes on the following popup box.

8. There is an option for participants in later steps of the Workflow process to Send Back to Previous Step from the Actions drop-down menu. This should only be done <u>after</u> consultation with the Faculty Records Office.

9. 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.