

# SHSU Watermark Workflow

## Probationary Faculty (Third-Year Review)

### Process Help Guide

---

Watermark Workflow for the Probationary Faculty Third-Year (straw poll) Review follows the multistep process illustrated in the flowchart below. Beginning at the Faculty submission step, the review portfolio is sent on to the Department Promotion and Tenure Advisory Committee. The portfolio then moves the administrative review steps from the Department Chair/School Director until it reaches the Dean. After that review is submitted, the process is transferred to the Faculty Records step for final processing.



---

### 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 - (Third-Year Straw Poll) - Spring 2025

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

If you do not submit your materials by the due date, this will automatically advance to the Department Promotion and Tenure Advisory Committee review.

In accordance with [APS 900417](#), probationary faculty members must upload a complete Faculty Review Portfolio in Watermark Faculty Success by the due date. Please reference the [training resources](#) 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/01c1b795-c1cc-411c-9b95-307519842425/step/f80d3820-ef83-4f59-9ef9-28eea19b2483/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=f4ade086-e74b-443f-8b8e-e101a0fd4078&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, the 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 - (Third-Year Straw Poll) - 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/01c1b795-c1cc-411c-9b95-307519842425/step/168761de-db39-43b7-83ce-735ed2113507/assignee/2388404?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=f4ade086-e74b-443f-8b8e-e101a0fd4078&orgId=1660&personId=2388404>

Dear Chair DPTAC,

The following submission is now ready for your review:

**Process:** TEST Probationary Faculty - (Third-Year Straw Poll) - 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/01c1b795-c1cc-411c-9b95-307519842425/step/168761de-db39-43b7-83ce-735ed2113507/assignee/2388403?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=f4ade086-e74b-443f-8b8e-e101a0fd4078&orgId=1660&personId=2388403>

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

Dear Bearkat Test,

The following submission is now ready for your review:

**Process:** TEST Probationary Faculty - (Third-Year Straw Poll) - 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.

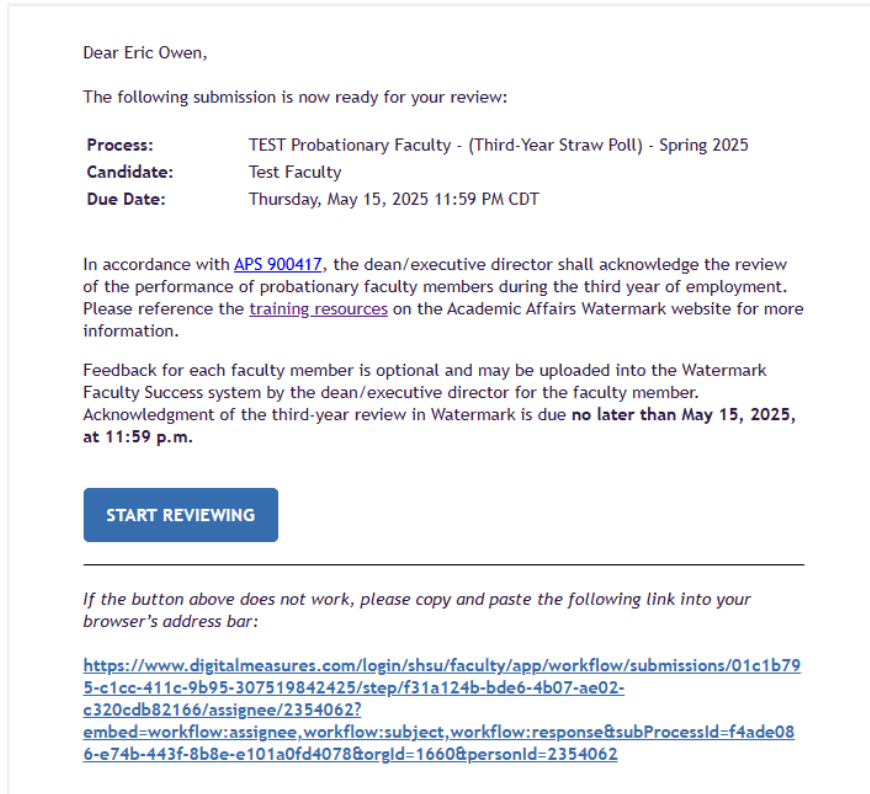
A written summary for each faculty member will be uploaded into the Watermark Faculty Success system by the department chair/school director for the faculty member. The due date for your submission is **no later than May 1, 2025, at 11:59 p.m.**

[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/01c1b795-c1cc-411c-9b95-307519842425/step/36673d6a-1868-497f-95c7-505db76d9c3d/assignee/2357490?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=f4ade086-e74b-443f-8b8e-e101a0fd4078&orgId=1660&personId=2357490>

The next step will be the Dean's step. Once the Department Chair/School Director has submitted their review letter for Third-Year Annual Review in Watermark Workflow, the College Dean/Executive Director will receive an automated email:

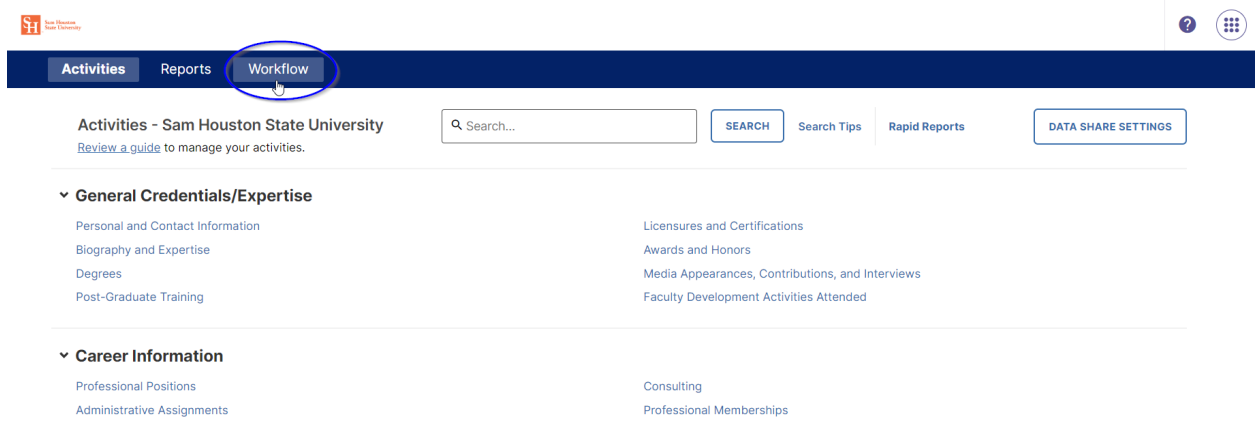


While the automated email will provide a link to Watermark, you can also navigate to Watermark following the login instructions below.

### 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.



## 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.)

**Activities** Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

**Inbox (8)**

[Show Filters \(0\)](#)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Tenure and/or Promotion Review - Spring 2025	Faculty	University Wide	Me		
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me		
TEST Post-Tenure Review - Spring 2025	Faculty	University Wide	Me		
TEST Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:35 AM
TEST Annual Review - Probationary Faculty (First-Year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:15 AM
TEST Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:24 AM
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 9:54 AM
TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:09 AM

**History (22)**

- 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.

**Activities** Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

**Inbox (8)**

[Show Filters \(0\)](#)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Tenure and/or Promotion Review - Spring 2025	Faculty	University Wide	Me	January 13, 2025 @ 11:59 PM	November 8, 2024 @ 10:56 AM



**Activities** Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

▼ **Inbox (8)**

▼ Hide Filters (0)

Name: Enter Name      Step: Enter Step      Candidate: Enter Candidate

Department: Any Department      Due Date Status: Any Status      **APPLY FILTERS**      Reset Filters

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Tenure and/or Promotion Review - Spring 2025	Faculty	University Wide	Me	January 13, 2025 @ 11:59 PM	November 8, 2024 @ 10:56 AM
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me	January 13, 2025 @ 11:59 PM	November 8, 2024 @ 4:41 PM



**Activities** Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

▼ **Inbox**

▼ Hide Filter (2)

Name: Enter Name      Step: Enter Step      Candidate: Enter Candidate

Department: University Wide (X)      Due Date Status: Soon (X)      **APPLY FILTERS**      Reset Filters

NAME | STEP | DEPARTMENT | CANDIDATE | DUE DATE | DATE RECEIVED

No Data to Display

- 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.

**Activities** Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your 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	Recall Download
Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Completed	Me	November 9, 2023 @ 11:59 PM	
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM	



Activities Reports Workflow				
<b>Workflow Tasks</b>				
Keep track of outstanding tasks in your inbox, and view your 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) Review (T/TT Faculty) - Spring 2024	Completed	Me	November 9, 2023 @ 11:59 PM	
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM	Download

# Watermark Workflow Probationary Faculty (Third-Year Straw Poll) Review Process Steps

## Faculty Step

- Under the Workflows Tasks Inbox click on Probationary Faculty - (Third-Year Straw Poll) - Spring 2025 to begin entering your portfolio.

Activities Reports Workflow						
<b>Workflow Tasks</b>						
Keep track of outstanding tasks in your inbox, and view your review history.						
Inbox (1)						
Show Filters (0)						
NAME ^	STEP ^	DEPARTMENT ^	CANDIDATE ^	DUE DATE  ?	DATE RECEIVED ^	
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	December 9, 2024 @ 10:17 AM	
History (29)						
NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS		
Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Completed	Me	November 9, 2023 @ 11:59 PM			
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM			

- 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

Candidate: Test Faculty

↓ CANCEL Actions

▼ Reports Have Been Run and Auto-Attached

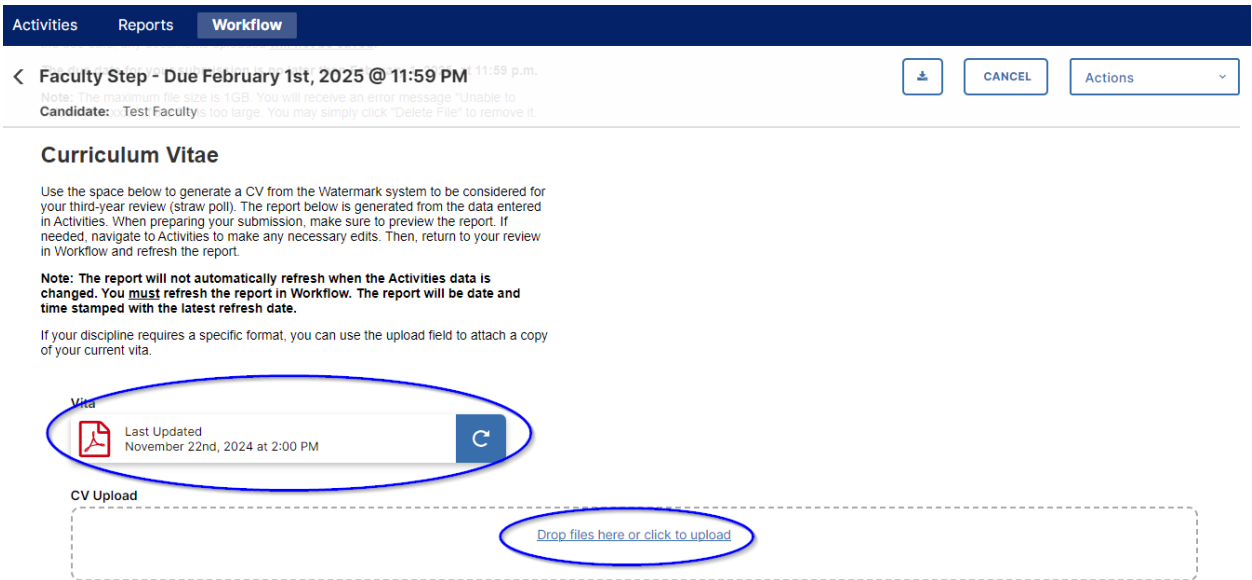
The following reports have been attached to this submission on your behalf.

- Vita - Last updated November 22, 2024 at 2:00 PM
- Review Activity Report for Academic Year 2024-2025 - Last updated November 22, 2024 at 2:00 PM
- Review Activity Report for Academic Year 2023-2024 - Last updated November 22, 2024 at 2:00 PM
- Review Activity Report for Academic Year 2022-2023 (and older) - Last updated November 22, 2024 at 2:00 PM

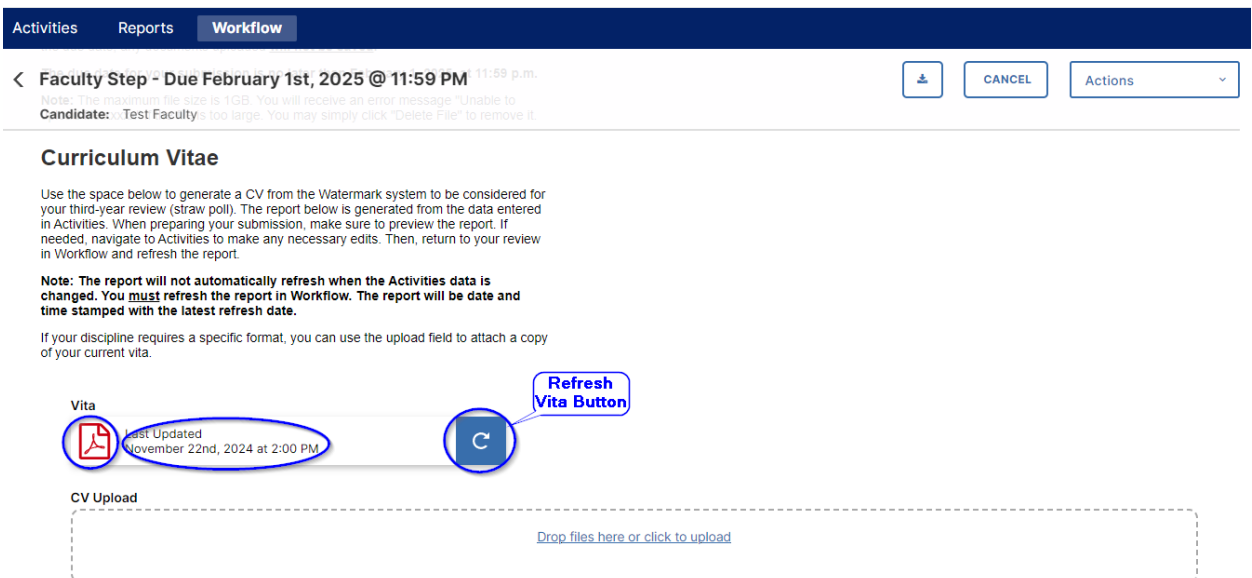
To ensure that the data included for your submission is current, we recommend that you refresh these reports. You can do this by selecting the "Refresh Report" button next to each individual report below, or you can use the "Refresh All" button here to refresh the reports listed above.

REFRESH ALL

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 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 (Third-Year Straw Poll), 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.xxxx" if the file is too large. You may simply click "Delete File" to remove it.
10. 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.

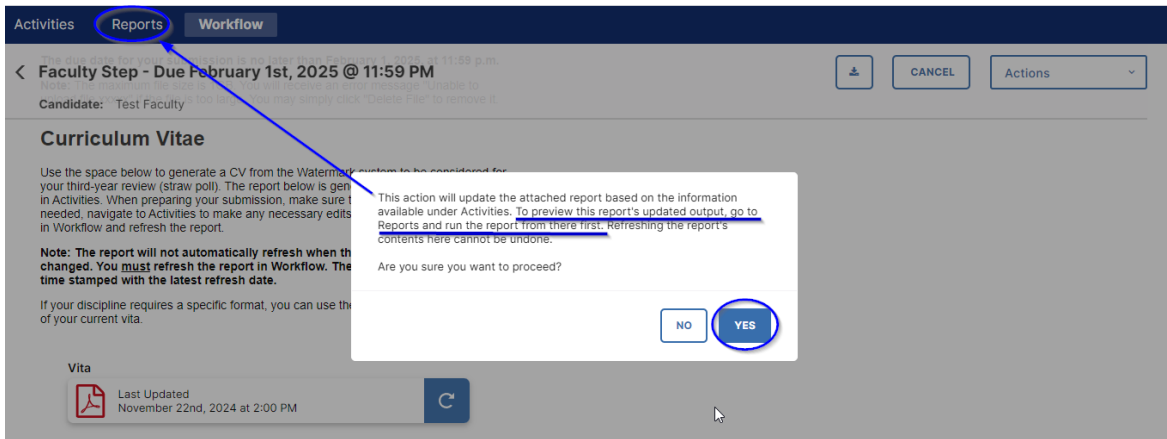


- The automatically generated Vita in Watermark is created using information from your entries in the Activities module. You can view this automated CV by clicking on the Adobe Acrobat icon. The Last Updated date and time shows you when the current Vita report was created – this will initially be set 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.



- If you click on the Refresh icon to update the autogenerated Vita, you will see a pop-up 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

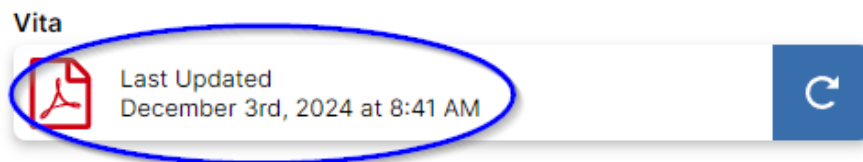
may generate a current copy of your Vita report by going to the Reports Tab if you want to see what the resulting Vita will look like before refreshing the version in your review portfolio.



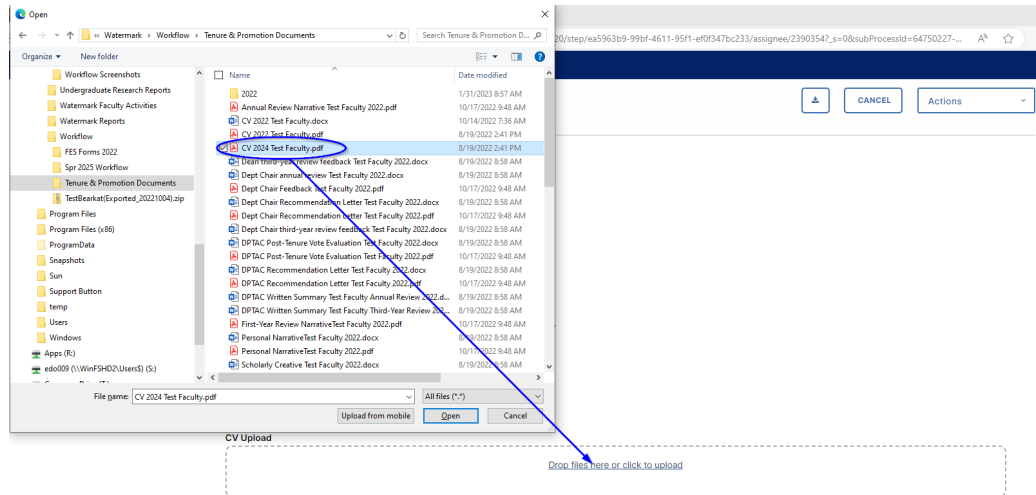
Once you have clicked Yes on the Vita Refresh popup window you will see the Last Updated date and time change.

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

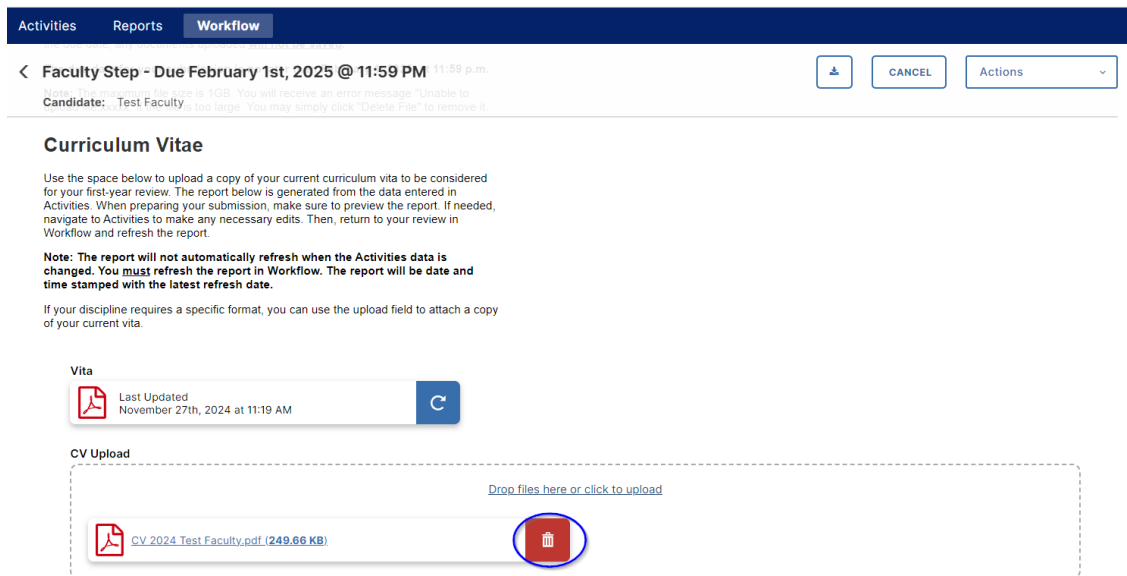
If your discipline requires a specific format, you can use the upload field to attach a copy of your current vita.



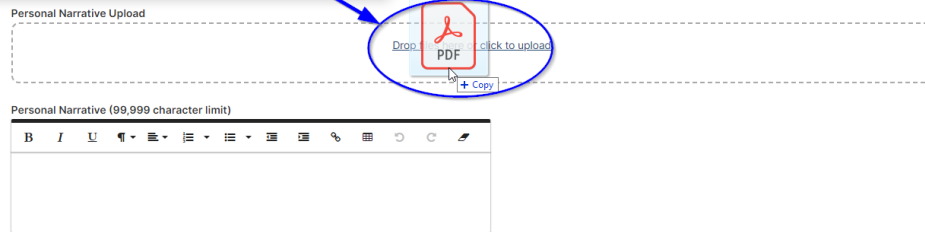
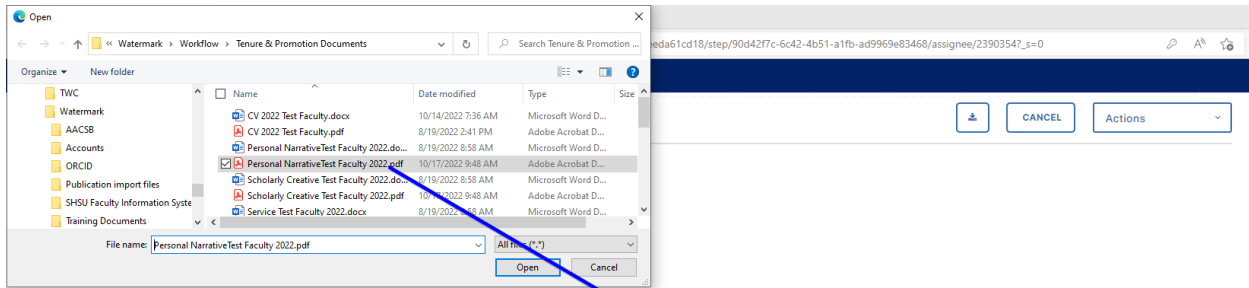
13. Alternatively, you may upload or drag and drop files into the CV Upload area – any file type can be used.



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



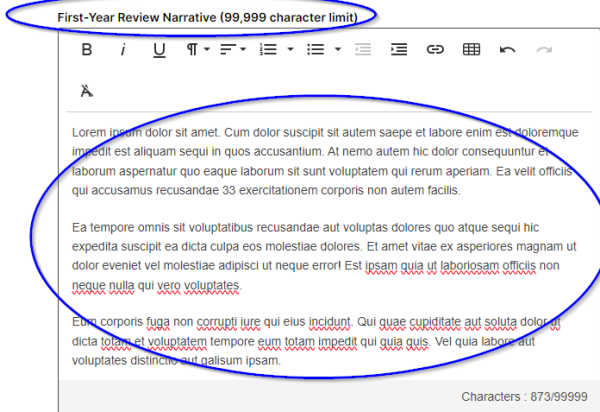
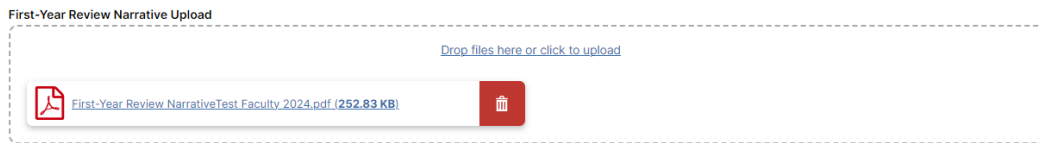
15. The next section of the Faculty Review Portfolio can be used to include a Personal Narrative. This is an optional step, and can be done either by uploading a file to the Personal Narrative Upload location, **OR** manually enter/cut and paste a narrative directly into the Text Box provided. The Text Box has a limit of just under 100,000 characters.



**First-Year Review Narrative**

Use the space below to upload a narrative file to be considered for your first-year review.


Alternatively, you may input your narrative directly into the text box below.




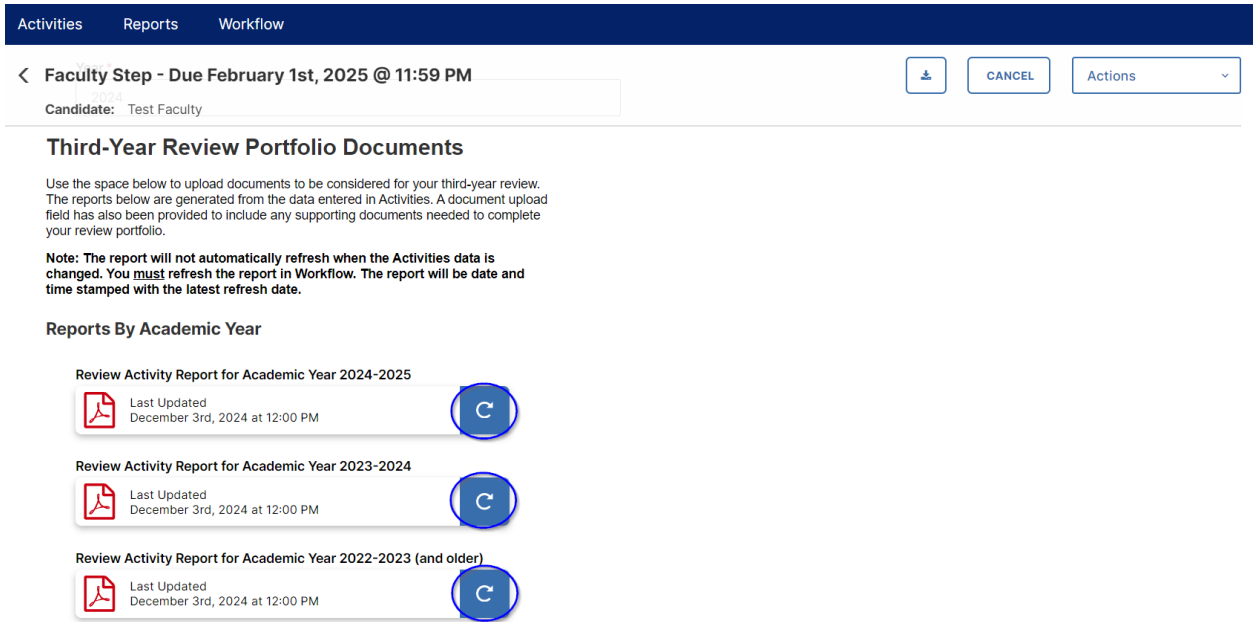
16. After the Personal Narrative is a required field used to convey to the reviewers which approved tenure unit standard you wish to be used for this evaluation. The field asks you to enter the Year of the approved standard. You can review the guidelines for

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.

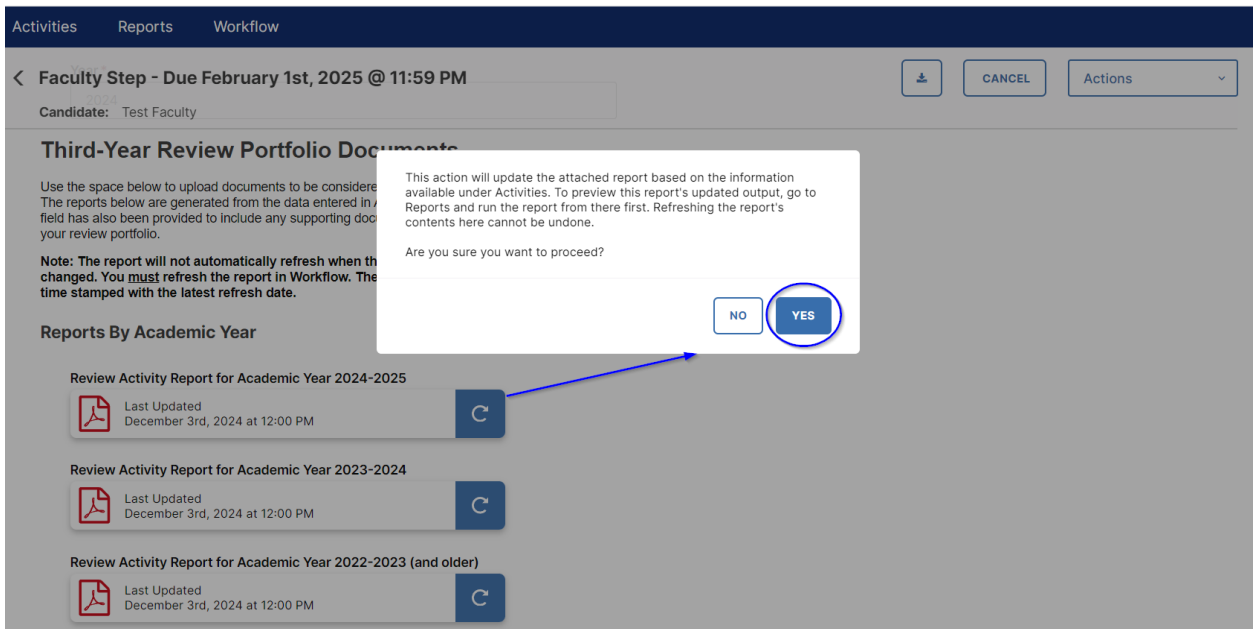
17. The final section of the Faculty Step is the Third-Year Review Portfolio Documents area. This section provides several Review Activity Reports generated from your Activities records based upon Academic Years (these reports yearly dates range will span from September 1<sup>st</sup> until the following August 31<sup>st</sup>). 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.

Activities **Reports** Workflow

Faculty Step - Due February 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

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

Reports By Academic Year

Review Activity Report for Academic Year 2024-2025

Last Updated  
December 9th, 2024 at 1:38 PM

Review Activity Report for Academic Year 2023-2024

Last Updated  
December 3rd, 2024 at 12:00 PM



Activities Reports Workflow

CREATE A NEW REPORT

Select the report you would like to view or edit, or select to create a new report. 3 Items

NAME	CREATED BY	ACTIONS
Annual Activity Report	Watermark	🔒
<b>Review Activity Report</b>	Watermark	🔒
Vita	Watermark	🔒



Activities Reports Workflow

Run Review Activity Report

Download this report's template

1 Date Range

Start Date 9/1/2024

End Date 8/31/2025

2 File Format

File Format PDF

Page Size Microsoft Word (.doc)

PDF

Web Page (.html)

RUN REPORT

**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.**



Activities Reports Workflow

Faculty Step - Due February 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Upload any other Supporting Documents (e.g., support letters, etc.)

Drop files here or click to upload

Review Activity Report for Academic Year 2024-2025  
Last Updated December 9th, 2024 at 1:38 PM

Review Activity Report for Academic Year 2023-2024  
Last Updated December 3rd, 2024 at 12:00 PM

Review Activity Report for Academic Year 2022-2023 (and older)  
Last Updated December 3rd, 2024 at 12:00 PM



Activities Reports Workflow

Faculty Step - Due February 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Upload any other Supporting Documents (e.g., support letters, etc.)

Drop files here or click to upload

Review Activity Report for Academic Year 2024-2025  
Last Updated December 9th, 2024 at 1:38 PM

Review Activity Report for Academic Year 2023-2024  
Last Updated December 3rd, 2024 at 12:00 PM

Review Activity Report for Academic Year 2022-2023 (and older)  
Last Updated December 3rd, 2024 at 12:00 PM

Open dialog box showing file selection:

- File name: TESTFACULTY\_IDEA Teaching Essentials Rep...
- File type: All Files (\*.\*)
- Buttons: Upload from mobile, Open, Cancel

**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.

Activities Reports Workflow

< Faculty Step - Due February 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Reports By Academic Year

- Review Activity Report for Academic Year 2024-2025  
Last Updated December 9th, 2024 at 1:38 PM
- Review Activity Report for Academic Year 2023-2024  
Last Updated December 3rd, 2024 at 12:00 PM
- Review Activity Report for Academic Year 2022-2023 (and older)  
Last Updated December 3rd, 2024 at 12:00 PM

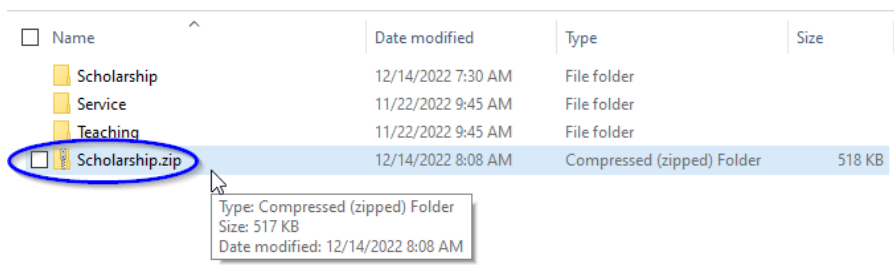
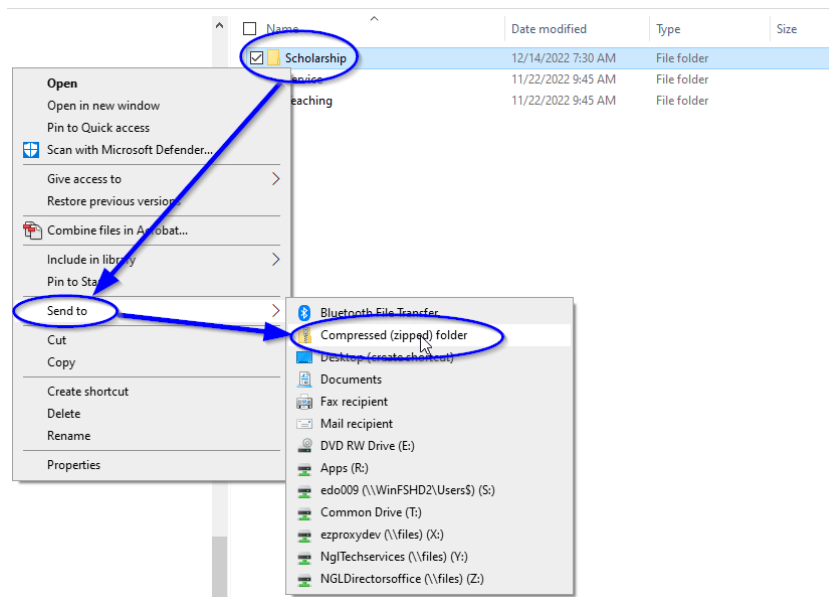
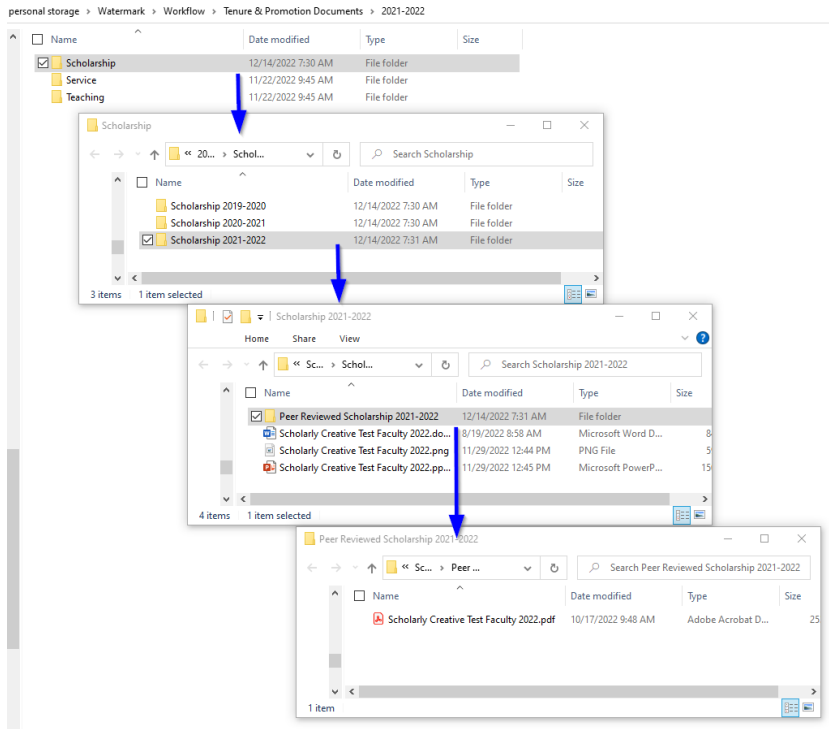
Upload any other Supporting Documents (e.g., support letters, etc.)

Drop files here or click to upload

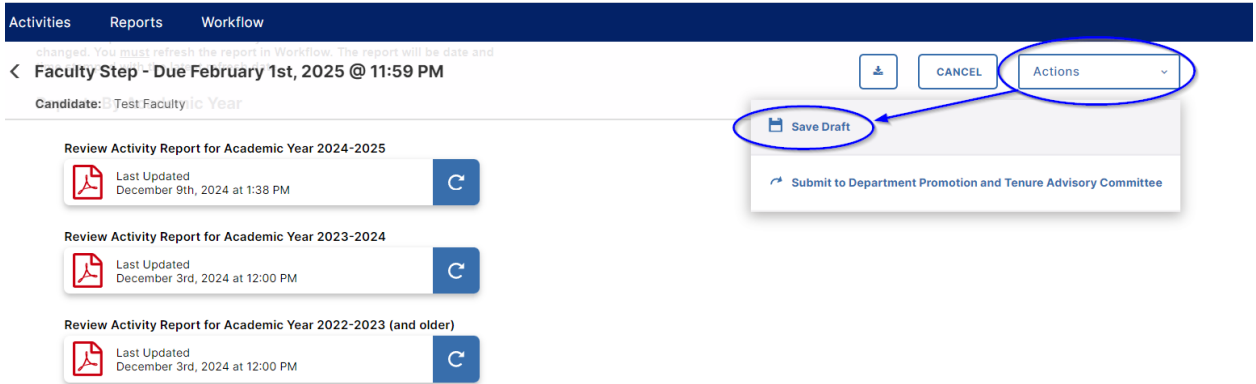
TEST_FACULTY_IDEA Teaching Essentials Reports.zip (541.85 KB)		Teaching Librarianship Test Faculty 2024.pdf (334.90 KB)	
Supporting Documents Test Faculty 2024.pdf (334.90 KB)		Service Test Faculty 2024.docx (83.68 KB)	
Teaching Librarianship Test Faculty 2024.docx (83.68 KB)		Supporting Documents Test Faculty 2024.docx (83.68 KB)	
Supporting Documents Test Faculty 2024.pdf (334.90 KB)		Scholarly Creative Test Faculty 2024.pdf (333.22 KB)	

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).

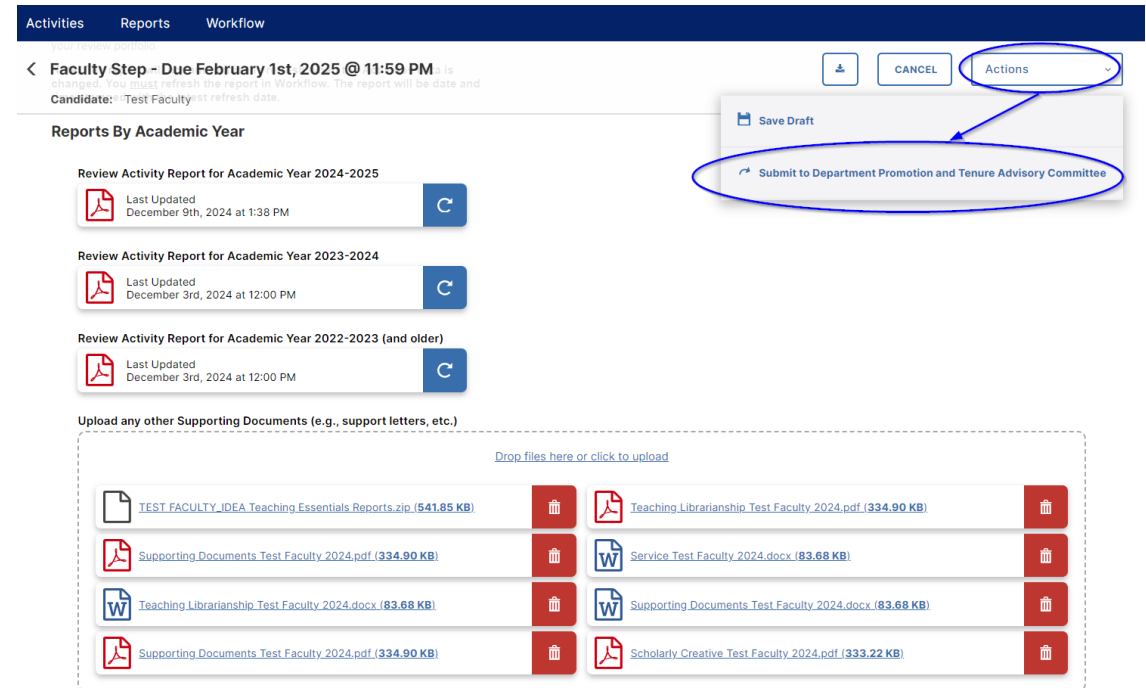
In the following example (on a PC), the Scholarship folder (which for illustration purposes contains 3 levels of subfolders and files,) is being zipped into a single file named Scholarship.zip. That resulting zip file will retain the folder structure when the zip file is subsequently opened.



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 a final submission to Start Portfolio Evaluation.

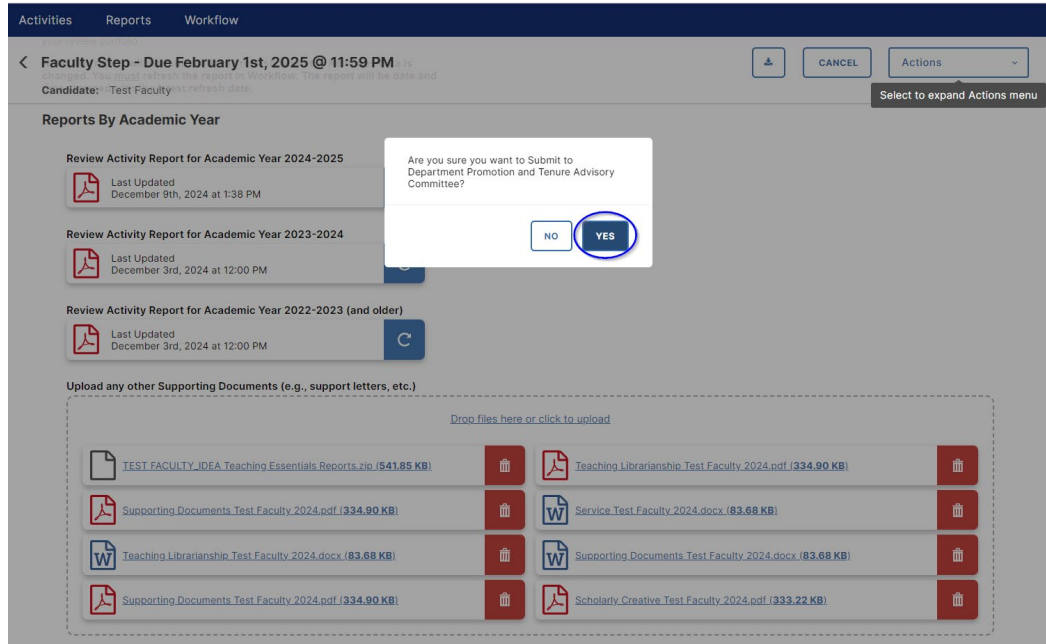


19. Once you have completed all of your entries and uploads for the Faculty Step, click on the Actions – Submit to Department Promotion and Tenure Advisory Committee and click Yes in the following popup window.

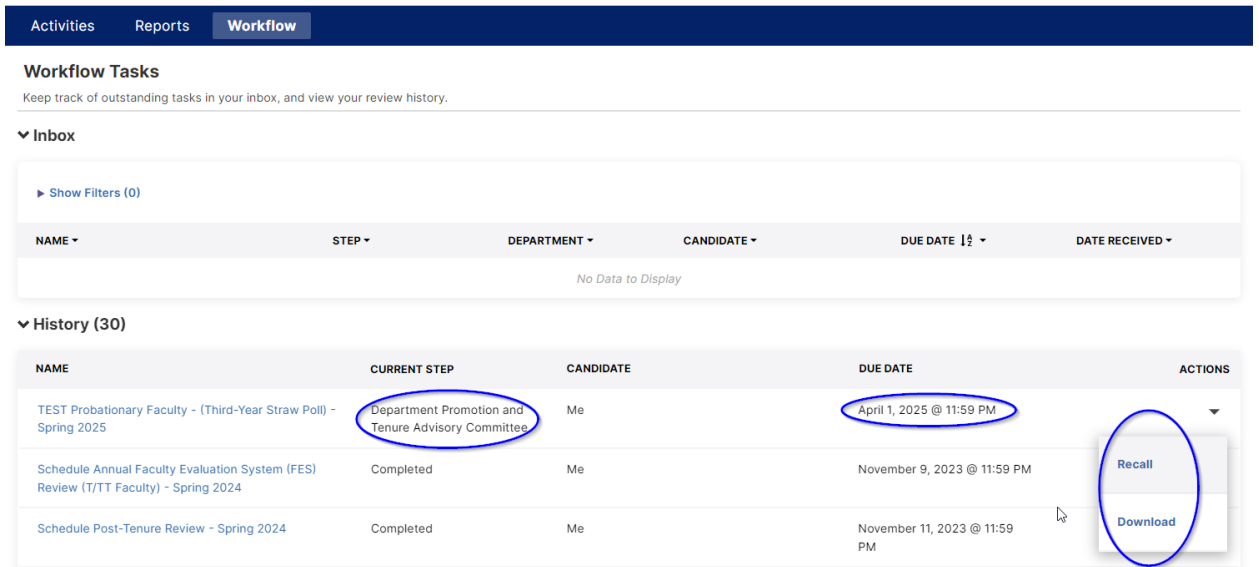


20.





21. 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.

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Department Chair/School Director	Me	May 1, 2025 @ 11:59 PM	▼
Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Completed	Me	November 9, 2023 @ 11:59 PM	▼
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM	▼

As an example, here is the faculty view of a DPTAC submission once the History Current Step has reached the Department Chair/School Director.

Activities Reports Workflow

TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025 - Updated December 10, 2024

Faculty Step - Test Faculty Submitted December 9, 2024 by Test Faculty

Department Promotion and Tenure Advisory Committee Step - Test Faculty Submitted December 10, 2024 by Chair DPTAC

**DPTAC Preview Vote**

Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES)  
5

DPTAC Preview Tally (NO)  
0

DPTAC Preview Tally (ABSTAIN)  
0

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

DPTAC approved written summary

DPTAC Written Summary Test Faculty Third-Year Review 2024.pdf (334.90 KB)

## 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 5 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 - (Third-Year Straw Poll) - 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 2:02 PM on December 9, 2024.

The screenshot shows the 'Workflow Tasks' section with a table of tasks. The first task is circled in blue:

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Probationary Faculty - (Third-Year Straw Roll) - Spring 2025	Department Promotion and Tenure Advisory Committee	University Wide	Faculty, Test	April 1, 2025 @ 11:59 PM	December 9, 2024 @ 2:02 PM

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.


The screenshot shows the 'Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM' page. The 'Candidate' is 'Test Faculty'. The 'Faculty' section is circled in blue, and the 'Third-Year Review Portfolio' title is also circled in blue. The page includes instructions on how to build the portfolio and submit it, along with a due date of February 1, 2025, at 11:59 p.m. and a note about the maximum file size of 1GB.

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.

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Vita

 Last Updated  
December 3rd, 2024 at 12:00 PM

CV Upload

 CV 2024 Test Faculty.pdf (249.66 KB)

Third-Year Narrative

Use the space below to upload a narrative file to be considered for your third-year review (straw poll).

Alternatively, you may input your narrative directly into the text box below.

Third-Year Review Narrative Upload

 Third-Year Review Narrative Test Faculty 2024.pdf (252.83 KB)

Third-Year Review Narrative (80,000 character limit)

Lorem ipsum dolor sit amet. Cum dolor suscipit sit autem saepe et labore enim, est  
 doloremque impedit est aliquam sequi in quos accusantium. At nemo autem hic  
 dolor consequuntur et laborum aspernatur quo eaque laborum sit sunt voluptatem  
 qui rerum aperiam. Ea velit officii qui accusamus recusandae 33 exercitationem  
 corporis non autem facilis.  
  
 Ea tempore omnis sit voluptatibus recusandae aut voluptas dolores quo atque sequi  
 hic expedita suscipit ea dicta culpa eos molestiae dolores. Et amet vitae ex  
 asperiores magnam ut dolor eveniet vel molestiae adipisci ut neque error! Est ipsam  
 quia ut laboriosam officii non neque nulla qui vero voluptates.  
  
 Eum corporis fuga non corrupti iure qui eius incidunt. Qui quae cupiditate aut soluta  
 dolor ut dicta totam et voluptatem tempore eum totam impedit qui quia quis. Vel  
 quia labore aut voluptates distinctio aut galisum ipsam.




< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty


 CANCEL Actions

Reports By Academic Year


Review Activity Report for Academic Year 2024-2025

 Last Updated  
December 9th, 2024 at 1:38 PM

Review Activity Report for Academic Year 2023-2024

 Last Updated  
December 3rd, 2024 at 12:00 PM

Review Activity Report for Academic Year 2022-2023 (and older)

 Last Updated  
December 3rd, 2024 at 12:00 PM

Upload any other Supporting Documents (e.g., support letters, etc.)

 TEST FACULTY\_IDEA Teaching Essentials Reports.zip (541.85 KB)
  Teaching Librarianship Test Faculty 2024.pdf (334.90 KB)

 Supporting Documents Test Faculty 2024.pdf (334.90 KB)
  Service Test Faculty 2024.docx (83.68 KB)

 Teaching Librarianship Test Faculty 2024.docx (83.68 KB)
  Supporting Documents Test Faculty 2024.docx (83.68 KB)

 Supporting Documents Test Faculty 2024.pdf (334.90 KB)
  Scholarly Creative Test Faculty 2024.pdf (333.22 KB)



**NOTE:** The candidate's Faculty 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.

Activities Reports Workflow

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

### Tenure Unit Standards

Use the space below to indicate the approval year of the tenure unit standards you wish to use during this evaluation. Reference [APS 900417](#), Section 5.03 for more details.

Year: 2024

- 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.

Activities Reports Workflow

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Save Draft

✓ Publish My Response to Chair

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

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

Acknowledgement: DPTAC Member



Activities Reports Workflow

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

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

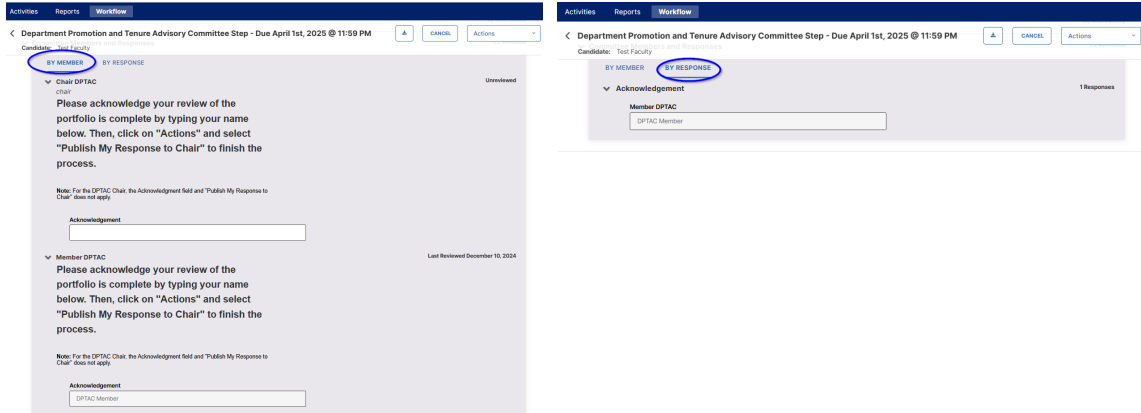
Note: For the DPTAC Chair, the Acknowledgment field and "Publish My Response to Chair" does not apply.

Acknowledgement: DPTAC Member

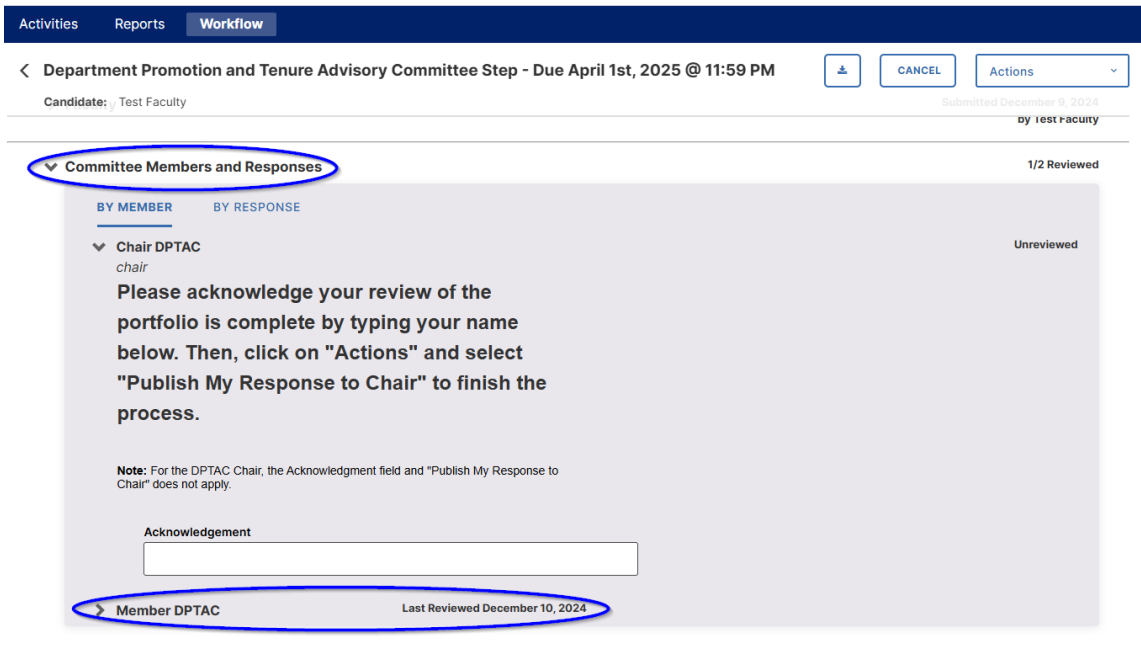
Are you sure you want to publish your response to your committee chair?

NO YES

- 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.



Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Committee Members and Responses  
Candidate: Test Faculty

BY MEMBER BY RESPONSE

▼ Chair DPTAC Unreviewed  
chair

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

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

Acknowledgement

▼ Member DPTAC Last Reviewed December 10, 2024

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

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

Acknowledgement

DPTAC Member

- The remaining section of the DPTAC chair screen contains the Committee Response entries that will be submitted to the Department Chair/School Director including a recommendation for tenure and tally of votes, a recommendation for promotion and tally of votes, and a file upload with the DPTAC letter of recommendation. All of these fields are required – some are drop-down menus while tallies require a number (or N/A) if either Tenure or Promotion is not being sought as part of the process.

Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Committee Members and Responses  
Candidate: Test Faculty

**This Committee's Response**

**Department Promotion and Tenure Advisory Committee (DPTAC) Third-Year Review (Straw Poll) Recommendation**

The contents of this Committee Chair Form constitute the DPTAC's submission for third-year review (straw poll).

Once all committee members have acknowledged their review is complete, and you have completed the required fields below, click on "Actions" and select "Submit to Department Chair/School Director" to advance the review to the next step.

The due date for DPTAC submission is no later than April 1, 2025, at 11:59 p.m.

Note: The DPTAC Chair does not complete the same acknowledgment step as the committee members.

**DPTAC Preview Vote**

Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES) \*

5

DPTAC Preview Tally (NO) \*

0

DPTAC Preview Tally (ABSTAIN) \*

0



Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty **DPTAC) Third-Year Review (Straw**

### Poll) Recommendation

The contents of this Committee Chair Form constitute the DPTAC's submission for third-year review (straw poll).

Once all committee members have acknowledged their review is complete, and you have completed the required fields below, click on "Actions" and select "Submit to Department Chair/School Director" to advance the review to the next step.

The due date for DPTAC submission is no later than April 1, 2025, at 11:59 p.m.

Note: The DPTAC Chair does not complete the same acknowledgment step as the committee members.

#### DPTAC Preview Vote

Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES) \*

DPTAC Preview Tally (NO) \*

DPTAC Preview Tally (ABSTAIN) \*

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

DPTAC approved written summary \* ▲

Drop files here or click to upload

This field is required

- 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.

Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM

Candidate: Test Faculty **Response**

### Department Promotion and Tenure Advisory Committee (DPTAC) Third-Year Review (Straw Poll) Recommendation

The contents of this Committee Chair Form constitute the DPTAC's submission for third-year review (straw poll).

Once all committee members have acknowledged their review is complete, and you have completed the required fields below, click on "Actions" and select "Submit to Department Chair/School Director" to advance the review to the next step.

The due date for DPTAC submission is no later than April 1, 2025, at 11:59 p.m.

Note: The DPTAC Chair does not complete the same acknowledgment step as the committee members.

#### DPTAC Preview Vote

Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES) \*

DPTAC Preview Tally (NO) \*

DPTAC Preview Tally (ABSTAIN) \*

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

DPTAC approved written summary \*

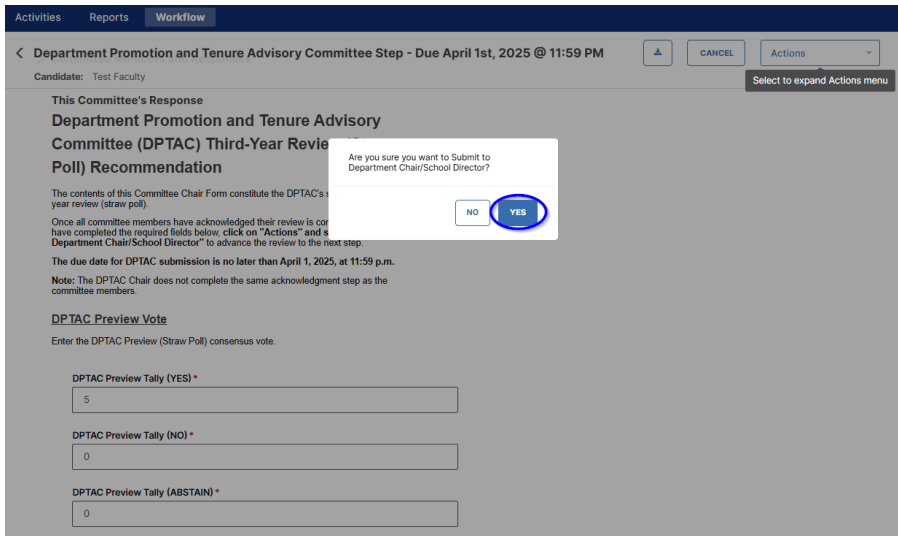
Drop files here or click to upload

DPTAC Written Summary Test Faculty Third-Year Review 2024.pdf (334.90 KB)

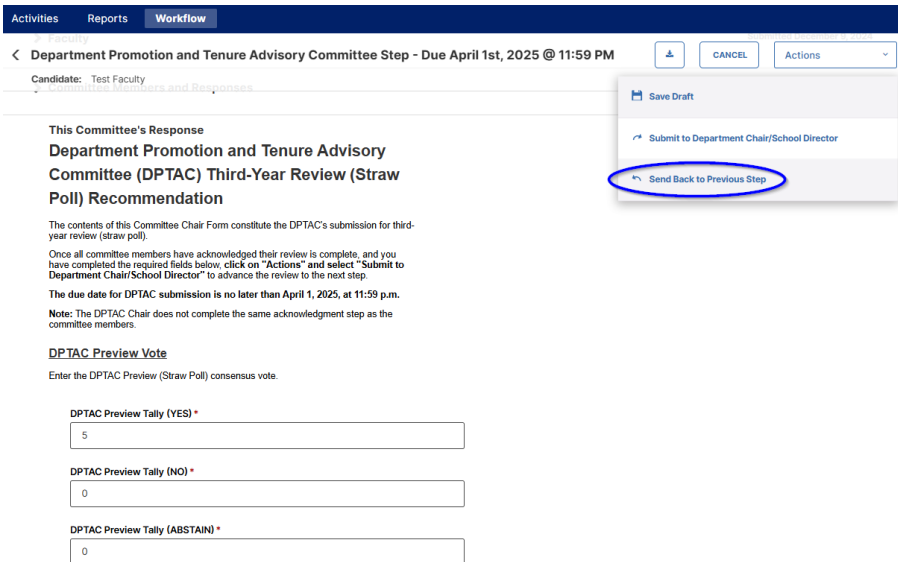
- DPTAC members can click on the Workflow Tasks Inbox item to see any drafts saved by the DPTAC chair, which include the Recommendations and Vote Tallies as well as access to the DPTAC Recommendation Letter uploaded file.

- 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 after 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.

Activities Reports **Workflow**

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

▼ Inbox

► Show Filters (0)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
No Data to Display					

▼ History (5)

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Department Chair/School Director	Test Faculty	May 1, 2025 @ 11:59 PM	▼
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Department Chair/School Director	Test Faculty	April 1, 2025 @ 11:59 PM	Recall Download
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Faculty	Test Faculty	February 1, 2025 @ 11:59 PM	▼
TEST Post-Tenure Review - Spring 2025	Faculty	Test Faculty	February 1, 2025 @ 11:59 PM	▼
TEST Tenure and/or Promotion Review - Spring 2025	Dean	Test Faculty	February 25, 2025 @ 11:59 PM	▼

## 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.

Activities Manage Data Reports **Workflow** ▼

Activities - Sam Houston State University Tasks  
Submissions   Search Tips Rapid Reports

▼ General Credentials/Expertise

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

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 5 above](#). In the Workflow Tasks Inbox, you will see all review processes awaiting your input and submission.

Activities Manage Data Reports Workflow

### Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

▼ Inbox (5)

► Show Filters (0)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	April 1, 2025 @ 11:59 PM	November 19, 2024 @ 11:40 AM
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 10, 2024 @ 11:26 AM
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 9, 2024 @ 10:29 AM
TEST Probationary Faculty (First-Year) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 9, 2024 @ 10:23 AM
TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 9, 2024 @ 10:29 AM

- 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.

Activities Manage Data Reports Workflow

### Workflow Submissions

Dates below are displaying in US/Central.

Filters Status: Open X

BULK DOWNLOAD EXPORT VIEW

CANDIDATE	TEMPLATE	SCHEDULE	STATUS	COLLEGE	DEPARTMENT	STEP	REVIEWER	DUE DATE	ACTIONS
Faculty, Test	Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	TEST Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	▼
Faculty, Test	Annual Review - Probationary Faculty (First-Year) - Spring 2025	TEST Annual Review - Probationary Faculty (First-Year) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	▼
Faculty, Test	Annual Faculty Evaluation (NTT Faculty) - Spring 2025	TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	▼
Faculty, Test	Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	TEST Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	▼
Faculty, Test	Promotion for Non-Tenure Track Faculty - Spring 2025	TEST Promotion for Non-Tenure Track Faculty - 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.



**Activities** Manage Data Reports Workflow

### Workflow Submissions

Dates below are displaying in US/Central

Filters: None

BULK DOWNLOAD EXPORT VIEW

CANDIDATE	TEMPLATE	SCHEDULE	STATUS	COLLEGE	DEPARTMENT	STEP	REVIEWER	DUE DATE	ACTIONS
Bearkat, Sammy	Test Tenure and/or Promotion (duplicate)	Test 1 Tenure and/or Promotion Review - Spring 2023	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	October 16, 2022	
Bearkat, Sammy	Test Tenure and/or Promotion	Test 1 Tenure and/or Promotion Review - Spring 2023	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	October 10, 2022	
Faculty, Test	Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Closed	Academic Affairs	University Wide	Completed	Test, Bearkat	November 9, 2023	
Faculty, Test	Post-Tenure Review - Spring 2024	Schedule Post-Tenure Review - Spring 2024	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	November 11, 2023	
Faculty, Test	Annual Faculty Evaluation (NTT Faculty) - Spring 2025	TEST Annual Faculty Evaluation (NTT Faculty) - 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

### Workflow Tasks

Keep track of outstanding tasks in your Inbox, and view your review history.

▼ Inbox (1)

Show Filters (0)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Tenure and/or Promotion Review - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	February 11, 2025 @ 11:59 PM	November 12, 2024 @ 5:06 PM

▼ History (6)

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
Test Spring 2023 Annual Review - Probationary Faculty	Completed	Me	September 20, 2022 @ 11:59 PM	
Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track) (DEMO)	Completed	Me	May 1, 2023 @ 11:59 PM	

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 22 above](#). This is followed by the Department Promotion and Tenure Advisory Committee (DPTAC) section contains all of their preview votes, and uploaded summary letters.

Activities Manage Data Reports Workflow

< Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Faculty

Submitted December 9, 2024 by Test Faculty

### Third-Year Review Portfolio

As you build your portfolio, you can click on "Actions" and select "Save Draft" until you are confident your submission form is complete.

Once you have completed your review portfolio, 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.

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 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 generate a CV from the Watermark system to be considered for your third-year review (straw poll). 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 must 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.

Vita

Last Updated  
December 3rd, 2024 at 12:00 PM

CV Upload

CV 2024 Test Faculty.pdf (249.86 KB)

↓

Activities Manage Data Reports Workflow

< Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM

Candidate: Test Faculty

Faculty

Submitted December 9, 2024 by Test Faculty

Department Promotion and Tenure Advisory Committee

Submitted December 10, 2024 by Chair DPTAC

### DPTAC Preview Vote

Enter the DPTAC Preview (Straw Poll) consensus vote.

DPTAC Preview Tally (YES)

5

DPTAC Preview Tally (NO)

0

DPTAC Preview Tally (ABSTAIN)

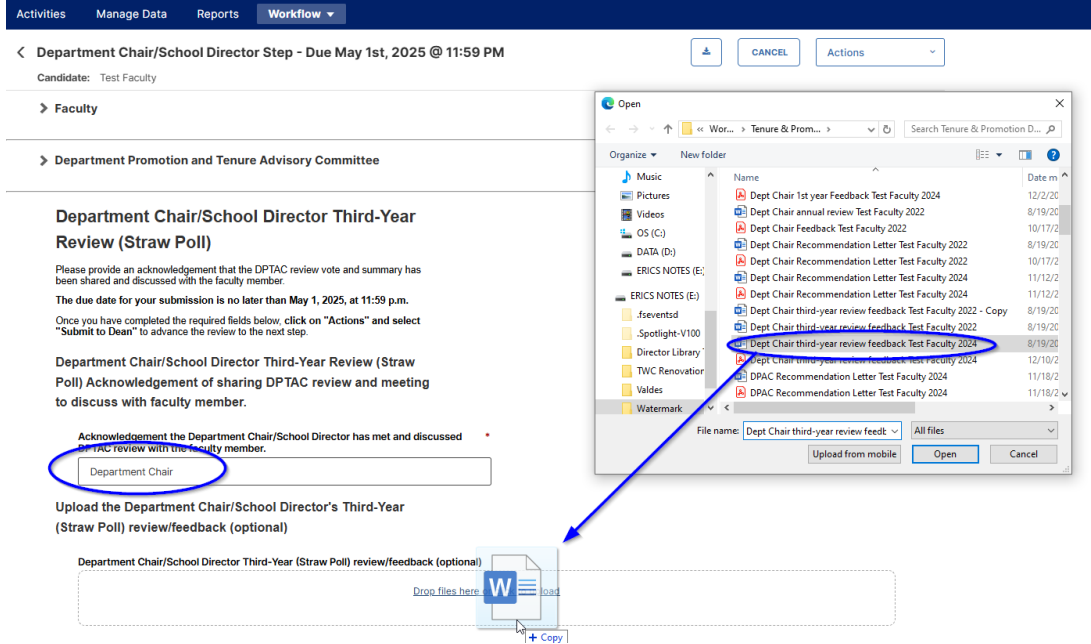
0

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

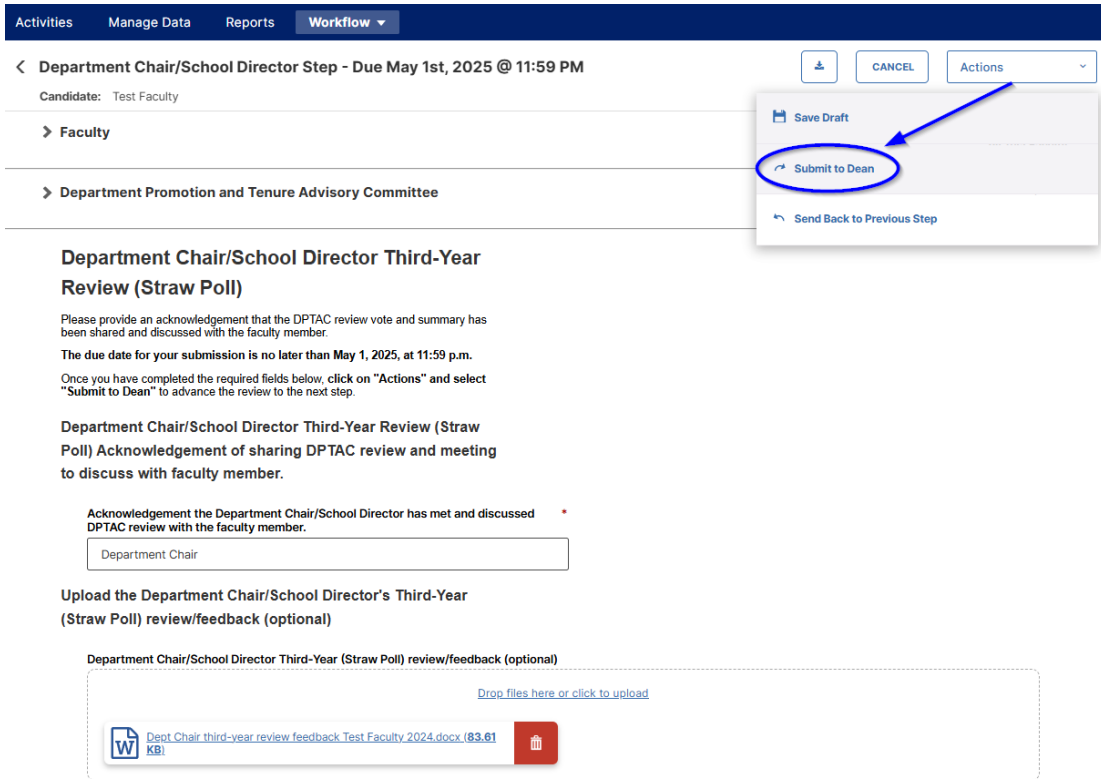
DPTAC approved written summary

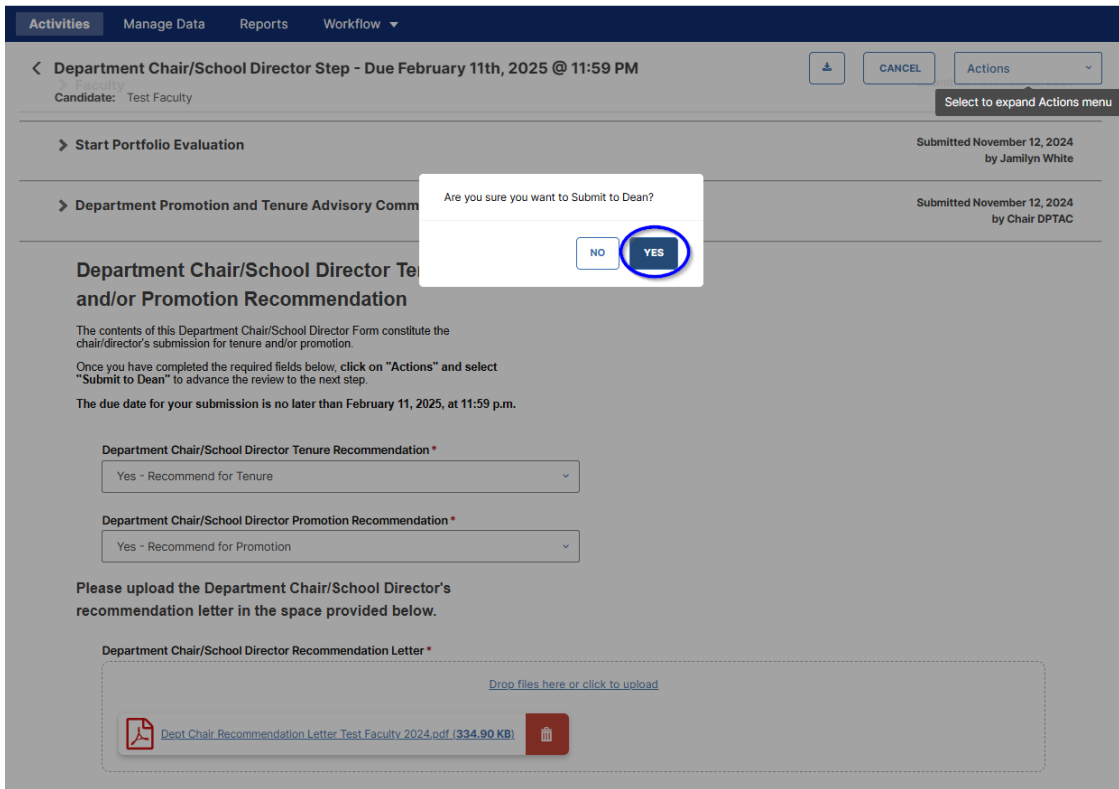
DPTAC Written Summary Test Faculty Third-Year Review 2024.pdf (334.90 KB)

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

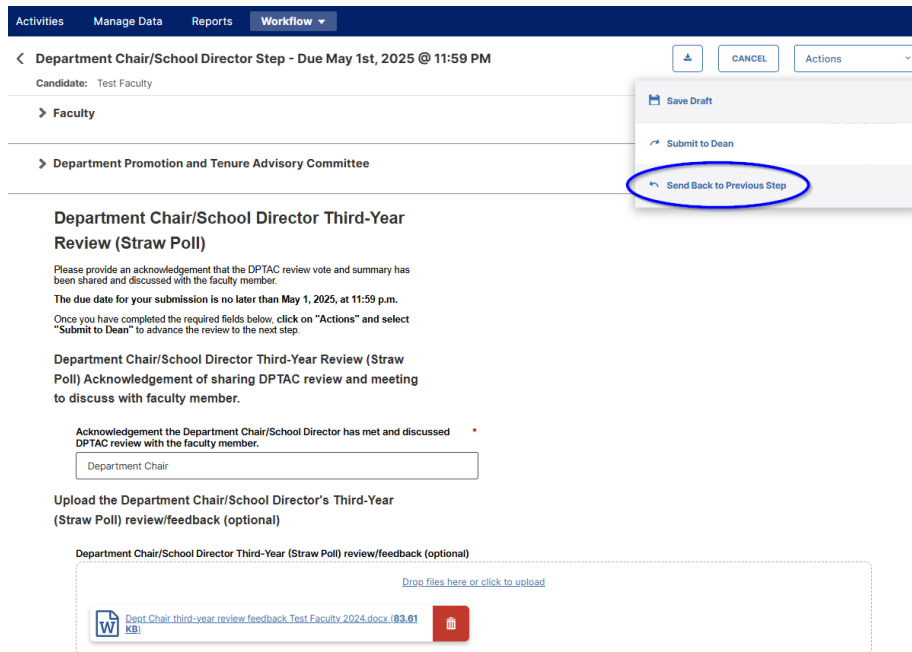


- Once completed, the Department Chair/School Director can select from the Actions drop-down menu to the Submit to Dean option and click Yes on the following popup box.





- 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 after consultation with the Faculty Records Office.



- Once the Department Chair/School Director has completed their submission to the Dean, 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 Dean.

The screenshot shows the 'Workflow Tasks' section of a software interface. At the top, there are navigation tabs: 'Activities', 'Manage Data', 'Reports', and 'Workflow'. Below this, the 'Workflow Tasks' header is followed by a sub-header 'Keep track of outstanding tasks in your inbox, and view your review history.' There are two sections: 'Inbox (4)' and 'History (8)'. The 'History' section contains a table with the following data:

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Dean	Test Faculty	May 15, 2025 @ 11:59 PM	▼
TEST Tenure and/or Promotion Review - Spring 2025	Dean	Test Faculty	February 25, 2025 @ 11:59 PM	Recall Download
Test Spring 2023 Annual Review - Probationary Faculty	Completed	Me	September 20, 2022 @ 11:59 PM	
Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track) (DEMO)	Completed	Me	May 1, 2023 @ 11:59 PM	▼

## Dean/Executive Director Step

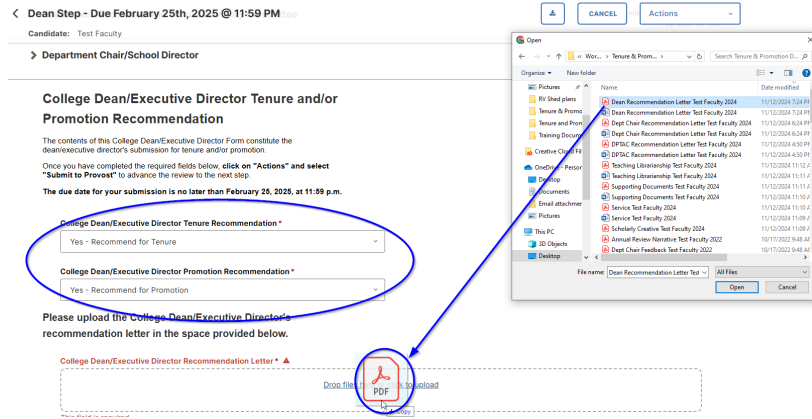
- The Watermark Navigation bar for Deans and the Executive Director of Library Services includes the modules visible to Department Chairs/School Directors. The Workflow tab for a Dean has the Tasks and Submissions options, and they have all of the Tasks and Submissions available to a Department Chair/School Director, with the added ability to interact with all review processes that take place within their college – see the processes as described in the Department Chair/School Director step on [page 31 above](#).
- In the Dean step, the first section will contain the Faculty’s Review Portfolio, with all entries and links to uploaded files. The second section will contain the preview vote tallies and an uploaded file with the DPTAC’s written summary. The third section contains the Department Chair/School Director’s acknowledgement of meeting the probationary faculty member, and potentially a file upload with their optional feedback.

The screenshot shows the 'Department Chair/School Director Step' in the workflow process. At the top, there are navigation tabs: 'Activities', 'Manage Data', 'Reports', and 'Workflow'. Below this, the title is 'TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025 - Updated December 10, 2024'. There are three sections:

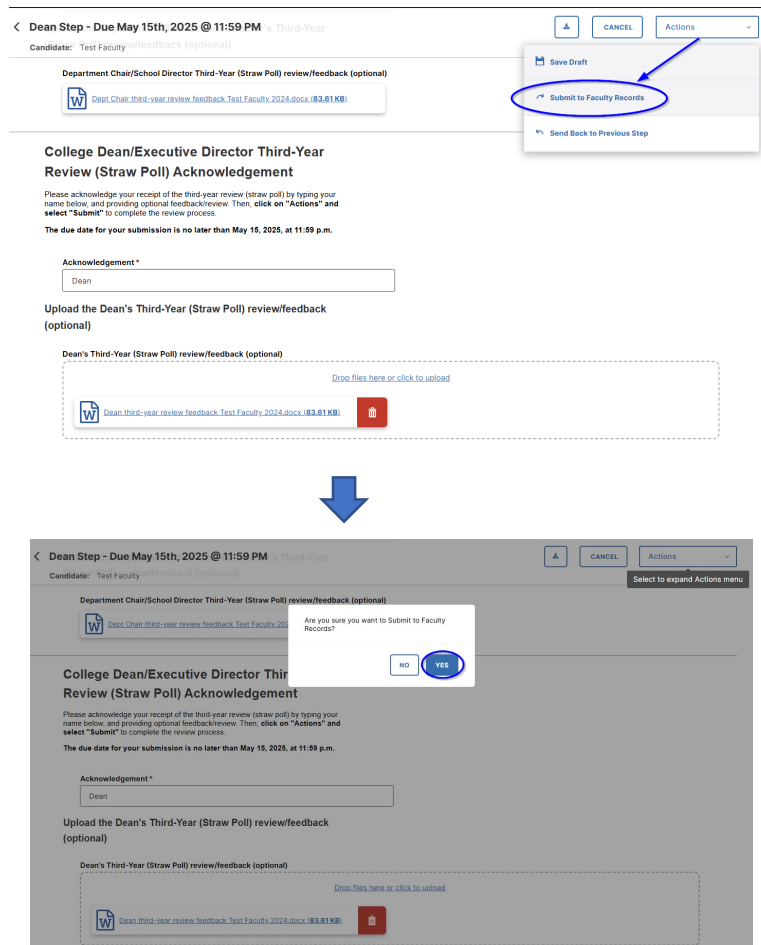
- Faculty Step - Test Faculty**: Submitted December 9, 2024 by Test Faculty.
- Department Promotion and Tenure Advisory Committee Step - Test Faculty**: Submitted December 10, 2024 by Chair DPTAC.
- Department Chair/School Director Step - Test Faculty**: Submitted December 10, 2024 by Bearkat Test.

Under the 'Department Chair/School Director Step', there is a text box for 'Department Chair' and a section for 'Upload the Department Chair/School Director's Third-Year (Straw Poll) review/feedback (optional)'. A file upload button is visible with the text 'Department Chair/School Director Third-Year (Straw Poll) review/feedback (optional)' and a file named 'Dept\_Chair\_third-year\_review\_feedback\_Test\_Faculty\_2024.docx (83.61 KB)'.

- The final section for the Dean Director step contains a required acknowledgement field that the Dean has received the third-year year review of the probationary faculty member. There is an additional file upload area for optional feedback from the dean.



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



- 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 after consultation with the Faculty Records Office.

Dean Step - Due May 15th, 2025 @ 11:59 PM

Candidate: Test Faculty

### College Dean/Executive Director Third-Year Review (Straw Poll) Acknowledgement

Please acknowledge your receipt of the third-year review (straw poll) by typing your name below, and providing optional feedback/review. Then, click on "Actions" and select "Submit" to complete the review process.

The due date for your submission is no later than May 15, 2025, at 11:59 p.m.

**Acknowledgement \***

Dean

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

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

Drop files here or click to upload

Dean third-year review feedback Test Faculty 2024.docx (83.61 KB)

- Save Draft
- Submit to Faculty Records
- Send Back to Previous Step

- Once the Dean/Executive 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.

**Workflow Tasks**  
Keep track of outstanding tasks in your inbox, and view your review history.

▼ **Inbox (1)**

Show Filters (0)

NAME	STEP	DEPARTMENT	CANDIDATE	DUE DATE	DATE RECEIVED
TEST Tenure and/or Promotion Review - Spring 2025	Dean	University Wide	Faculty, Test	February 25, 2025 @ 11:59 PM	December 6, 2024 @ 1:38 PM

▼ **History (2)**

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
TEST Probationary Faculty - (Third-Year Straw Poll) Spring 2025	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	Recall Download
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Department Chair/School Director	Test Faculty	April 1, 2025 @ 11:59 PM	