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

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

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,	Dear Chair DPT	Dear Chair DPTAC,		
The following	submission is now ready for your review:	The following submission is now ready for your review:			
Process:	TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Process:	TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025		
Candidate:	Test Faculty	Candidate:	Test Faculty		
Due Date:	Date: Tuesday, April 1, 2025 11:59 PM CDT Due Date: Tuesday, April 1, 2025 11:59		Tuesday, April 1, 2025 11:59 PM CDT		
In accordance with <u>APS 900417</u> , 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 <u>training resources</u> on the Academic Affairs Watermark website for more information. A written summary for each faculty member will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the faculty member.		Committee (DF members begir <u>training resour</u> information. A written sumn Watermark Fac	In accordance with <u>APS 900417</u> , 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 <u>training resources</u> on the Academic Affairs Watermark website for more information. A written summary for each faculty member will be uploaded into the Watermark Faculty Success system by the DPTAC Chair for the faculty member.		
START REV	ior your submission is no later than April 1, 2025, at 11:59 p.m.	START REV	or your submission is no later than April 1, 2025, at 11:59 p.m.		
	above does not work, please copy and paste the following link ser's address bar:		bove does not work, please copy and paste the following link ser's address bar:		
	ligitalmeasures.com/login/shsu/faculty/app/ missions/92b2d884-dd71-4499-b4c8-d7da0ebeed10/	https://www.digitalmeasures.com/login/shsu/faculty/app/ workflow/submissions/92b2d884-dd71-4499-b4c8-d7da0ebeed10/			
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	&oreid=1660&personId=2388404	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:

	est,
The following s	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
Watermark Fac	
	bove does not work, please copy and paste the following link
	ser's address bar:

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

Logging into Watermark Faculty Success

- Go to <u>Watermark Faculty Success</u> (<u>https://login.watermarkinsights.com/connect/samhoustonstateuniversity</u>)
- 2. NOTE: You may receive a two-factor authentication (DuoSecurity) prompt to connect via campus Single Sign-On (SSO).
- 3. Click the Workflow link in the navigation bar.

Watermark** Faculty Success formerly Digital Measures		Stan Housen	0 iii
Activities Reports Workflow			
Activities - Sam Houston State University Review a guide to manage your activities.	Q. Search All Activitie SEARCH Search Tips Rapid Reports		
✓ General Credentials/Expertise			
Personal and Contact Information	Licensures and Certifications		
Biography and Expertise	Awards and Honors		
Degrees	Media Appearances and Interviews		
Post-Graduate Training	Faculty Development Activities Attended		
 Career Information 			
Professional Positions	Consulting		
Administrative Assignments	Professional Memberships		

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.)

Workflow Tasks					
eep track of outstanding tasks in your inbox, and v	iew your review history	Ι.			
Inbox (8)					
► Show Filters (0)					
NAME 1 ^z	STEP -	DEPARTMENT -	CANDIDATE -	DUE DATE -	DATE RECEIVED -
TEST Tenure and/or Promotion Review - Spring 2025	Faculty	University Wide	Me	Sort)
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me	Sort Order	
TEST Post-Tenure Review - Spring 2025	Faculty	University Wide	Me		LY D S
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 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

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.

Activities Reports Workflow					
Workflow Tasks Keep track of outstanding tasks in your inbox, and vi	ew your review history.				
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Show Filters (0)					
NAME I ^z -	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
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orkflow Tasks						
ep track of outstanding tasks in your inbox, and vi	ew your revie	w history.				
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TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me		January 13, 2025 @ 11:59 PM	November 8, 2024 @ 4:4 PM
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Workflow Tasks Keep track of outstanding tasks in your inbox, a ✓ Inbox ✓ Hide Filter (2) Name Enter Name Department		Step Enter Step Due Date Status		Enter Candidate		MTE RECEIVED +

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.

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eep track of outstanding tasks in your inbox, and view	your review history.			
Inbox (7)				
History (23)				
NAME	CURRENT STEP -	CANDIDATE	DUE DATE	ACTIC
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	Recall
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59	Download

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Activities Reports Workflow				
Workflow Tasks Keep track of outstanding tasks in your inbox, and view yo Inbox (7)	ur review history.			
✓ History (23) NAME	CURRENT STEP -	CANDIDATE	DUE DATE	ACTIONS
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Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Completed	Ме	November 9, 2023 @ 11:59 PM	ľ.
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM	mload

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.

Activities Reports Workflow					
Workflow Tasks Keep track of outstanding tasks in your inbox, and vie	w your review history.				
✓ Inbox (1)					
► Show Filters (0)					
NAME -	STEP -	DEPARTMENT -	CANDIDATE -	DUE DATE 12 -	DATE RECEIVED -
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	December 9, 2024 @ 2:16 PM
> History (29)					

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).

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- 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 <u>will not be saved</u>.
- 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.

Activities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM Candidate: Test Faculty	Actions *
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Last Updated December 3rd, 2024 at 12:03 PM	

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 <u>must</u> refresh the report in Workflow. The report will be date and time stamped with the latest refresh date.

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



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

Activities Reports Workflow	
 Faculty Step - Due February 1st, 2025 @ 11:59 PM Candidate: Test Faculty to large Ym my simply did Table File to move it 	C Open × ← → · ↑ [≪ Wor → Tenure & Prom → v]] Search Tenure & Promotion D p
Curriculum Vitae Use the space below to generate a CV from the Watermark system to be considered for your probationary review. The report below is generated from the data entered in Activities. When preparing your submission, make sure to preview the report. If needed, navigate to Activities to make any necessary edits. Then, return to your review in Workflow and refersib the report. Workflow and refersib the report. Note: The report will not automatically refresh when the Activities data is changed, you must refersib the report. If your discipline requires a specific format, you can use the upload field to attach a copy of your current via.	Organize New folder Ell Image: Constraint of the second of the secon
Vita Last Updated December 10th, 2024 at 1:50 PM CV Upload Drop files PDF rounload	File name: CV 2024 Test Faculty All files Uplead from mobile Open Cancel

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

Activities Reports Workflow		
Faculty Step - Due February 1st, 2025 @ 11:55	2025, at 11:59 p.m. 9 PM Manae "Unable to	CANCEL Actions
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If your discipline requires a specific format, you can use the upload of your current vita.	field to attach a copy	
Vita Last Updated December 10th, 2024 at 1:50 PM	С	
CV Upload		
	Drop files here or click to upload	
CV 2024 Test Faculty, pdf (249.66 KB)		

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.

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Use the space below to review.	y Review Narrative o upload a narrative file to be considered input your narrative directly into the text I					
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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 <u>APS 900417</u> (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 in the left to view the current Review Activity Report associated with that Academic Year. This will open an additional browser tab to display a PDF version of the report.

Activities Rep	oorts Workflow	,						
Candidate: Tes		1st, 2025 @ 11:59 I	РМ	(±	CANCEL	Actions	~
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Reports By A	cademic Year							
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Review Act	ivity Report for Acade	mic Year 2021-2022	_					
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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 control the right of each report to update the report.

Activities Reports Workflow				
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Note: The report will not automatically refursh when the Activities data is changed. You must refrash the report in Workflow. The report will be date and time stamped with the lates: treef table.				
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Faculty members submitting documents by Academic Year only need to upload those years pertaining to their current review, which can vary depending upon service credit or tolled years.				
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Last Updated December 3rd, 2024 at 12:03 PM				
Review Activity Report for Academic Year 2023-2024				
Last Updated December 3rd, 2024 at 12:03 PM				
Review Activity Report for Academic Year 2022-2023				
Last Updated December 3rd, 2024 at 12:03 PM				
Review Activity Report for Academic Year 2021-2022				
Lest Updated December 3rd, 2024 at 12:03 PM				
Review Activity Report for Academic Year 2020-2021 (and older)				
Last Updated December 3rd, 2024 at 12:03 PM				

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

Activities Reports Workflow		
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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.



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ect the report you would like to view or edit, or select to create a n	ew report. 31
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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.

ivities	Reports	Workflow							
Faculty	Step - Due	e February 1st, 2025	5 @ 11:59 PM			*	CANCEL	Actions	
Candidate	: Test Facult	y automatically refresh when							
changed. Y time stamp	You <u>must</u> refre bed with the la	sh the report in Workflow. 1 test refresh date.							
Reports	By Acaden	nic Year							
Faculty me years perta tolled years	ining to their cu	ng documents by Academic Y irrent review, which can vary	'ear only need to upload those depending upon service credi	or					
Revie	w Activity Rep	port for Academic Year 202	4-2025						
K	Last Update December 1	ed 0th, 2024 at 2:37 PM	С						
Revie	w Activity Rep	port for Academic Year 202	3-2024						
K	Last Update December 3	ed 3rd, 2024 at 12:03 PM	с						
Revie	w Activity Rep	oort for Academic Year 202	2-2023						
K	Last Update December 3	ad ard, 2024 at 12:03 PM	с						
Revie	w Activity Rep	port for Academic Year 202	1-2022						
Z	Last Update December 3	ed 3rd, 2024 at 12:03 PM	C						
Revie	w Activity Rep	port for Academic Year 202	0-2021 (and older)						
R	Last Update		c						
	December a	sid, 2024 at 12:03 PM							
Uploa	d any other S	upporting Documents (e.g.	, support letters, etc.)						
				Drop files here or click to u	pload				

Activities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM	CANCEL Actions
Candidate: Test Faculty	
changed. You <u>must</u> refresh the report in Workflow. The report will be date and time stamped with the latest refresh date.	C Open
Reports By Academic Year	A Search Tenure & Prom > V O Search Tenure & Promotion D, C Search Tenure & Prom
Faculty members submitting documents by Academic Year only need to upload those years pertaining to their current review, which can vary depending upon service credit or tolled years.	Organize + New folder BIT + DI = ERICS NOTES (E) ^ Name Date maximum (2019), rescue 2, comm.
Review Activity Report for Academic Year 2024-2025	ERICS NOTES (E) EST FACULTY_IDEA Teaching Essentials (2016)_Spring2023_Qua 11/18/ fest FACULTY IDEA Teaching Essentials (2016)_Spring2024_Qua 11/18/ TEST FACULTY IDEA Teaching Essentials (2016)_Spring2024_Qua 11/18/
Last Updated December 10th, 2024 at 2:37 PM	Spotlight-V100 E TEST FACULTY_IDEA Teaching Essentials (2016), Summer2023_Q 11/18, Director Library BTEST FACULTY_IDEA Teaching Essentials (2016), Summer2024_Q 11/18,
Review Activity Report for Academic Year 2023-2024	TWC Renovation 11/25 FACULTY UDA Teaching Essentials Report 11/26 Waldes Third-Year Review Narrative Test Faculty 2022 10/17 Waldes Third-Year Review Narrative Test Faculty 2024 10/17
Last Updated December 3rd, 2024 at 12:03 PM	Watermark v c
Review Activity Report for Academic Year 2022-2023	File name: TEST FACUUTY_IDEA Teaching Esse VIpload from mobile Open Cancel
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Review Activity Report for Academic Year 2021-2022	
Last Updated December 3rd, 2024 at 12:03 PM	
Review Activity Report for Academic Year 2020-2021 (and older)	
Last Updated December 3rd, 2024 at 12:03 PM	
Upload any other Supporting Documents (e.g., support letters, etc.)	
Drop.fil	les here or each to upload

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	e February 1st, 2025 @ 11:59 PM			A CANCEL	Actions	Ŷ
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years per tolled yea	aining to their cu 3.	rrent review, which can vary depending upon servic	e credit or				
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	Last Update December 3	rd, 2024 at 12:03 PM					
Revi	ew Activity Rep	ort for Academic Year 2022-2023					
	Last Update December 3	rd, 2024 at 12:03 PM					
Revi	ew Activity Rep	ort for Academic Year 2021-2022					
	Last Update December 3	rd, 2024 at 12:03 PM					
Revi		ort for Academic Year 2020-2021 (and older)					
4	Last Update December 3	d ird, 2024 at 12:03 PM C					
Uplo	ad any other Si	upporting Documents (e.g., support letters, etc					
			Drop files here	or click to upload			
		ULTY JDEA Teaching Essentials Reports zio (541.85	KB) 🗇	Teaching Librarianship Test Faculty	2024.docx (83.68 KB)	a	
	Scholarly.	Creative Test Faculty 2024.docx (83.61 KB)		Service Test Faculty 2024.docx (83.	<u>68 KB)</u>		
		g Documents Test Faculty 2022.docx (83.61 KB)	ŵ	Supporting Documents Test Faculty	2024.pdf (334.90 KB)	Û	

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.

Activities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM Candidate: Test Faculty	CANCEL Actions
Review Activity Report for Academic Year 2024-2025 Last Updated C	Submit to Department Promotion and Tenure Advisory Committee
Review Activity Report for Academic Year 2023-2024	
Review Activity Report for Academic Year 2022-2023 Last Lobdated December 3rd, 2024 at 12:03 PM C	
Review Activity Report for Academic Year 2021-2022 Last Updated C	
Review Activity Report for Academic Year 2020-2021 (and older) Last Updated C	
Upload any other Supporting Documents (e.g., support letters, etc.) Droo files here o	r click to uplead
TEST FACULTY IDEA Teaching Essentials Reports zip (541.85 KB)	Teaching Librarianship Test Faculty 2024.docx (63.68 KB)
Scholarly Creative Test Faculty 2024.docx (63.61KB)	Service Test Faculty 2024.docx (83.68 KB)
Supporting Documents Test Faculty 2022.docx (83.61 KB)	Supporting Documents Test Faculty 2024 odf (334.90 KB)

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.

	ose redit or
lad years.	🗎 Save Draft
Review Activity Report for Academic Year 2024-2025	Submit to Department Promotion and Tenure Advisory Committee Co
Last Updated December 10th, 2024 at 2:37 PM	
Review Activity Report for Academic Year 2023-2024	
Last Updated December 3rd, 2024 at 12:03 PM	
Review Activity Report for Academic Year 2022-2023	
Last Updated December 3rd, 2024 at 12:03 PM	
Review Activity Report for Academic Year 2021-2022	
Last Updated December 3rd, 2024 at 12:03 PM	
Review Activity Report for Academic Year 2020-2021 (and older)	
Last Updated December 3rd, 2024 at 12:03 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	1 Teaching Librarianship Test Faculty 2024.docx (83.68 KB)
	Service Test Faculty 2024.docx (83.85 KB) 1
Scholarly Creative Test Faculty 2024.docx (83.61 KB)	

Activities Reports Workflow		
 Faculty Step - Due February 1st, 2025 @ 11: Candidate: Test Faculty 		CANCEL Actions Select to expand Actions menu
Review Activity Report for Academic Year 2024-2025 Last Updated December 10th, 2024 at 2:37 PM	Are you sure you want to Submit to Department Promotion and Tenure Advisory Committee?	
Review Activity Report for Academic Year 2023-2024 Last Updated December 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2022-2023	NO	
Last Updated December 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2021-2022	C	
Last Updated December 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2020-2021 ((and older)	
Last Updated December 3rd, 2024 at 12:03 PM	C	

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.

Activities Reports Workflow				
Workflow Tasks Keep track of outstanding tasks in your inbox, and view you	r review history.			
Inbox				
History (27)				
NAME	CURRENT STEP -	CANDIDATE	DUE DATE	ACTIONS
TEST Tenure and/or Promotion Review - Spring 2025	Dean	Me	February 25, 2025 @ 11:59 PM	•
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Department Chair/School Director	Me	April 1, 2025 @ 11:59 PM	•
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Separtment Promotion and Sepure Advisory Committee	Me	April 1, 2025 @ 11:59 PM	Ť
TEST Post-Tenure Review - Spring 2025	Department Promotion and Tenure Advisory Committee	Me	April 1, 2025 @ 11:59 PM	all
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty Records	Ме	May 31, 2025 @ 11:59 PM	vnload

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

 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 <u>page 4 above</u>. 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.

Activities Reports Workflow	
Candidate: Test Faculty	Letters Cancel Actions
Faculty Probationary Review Portfolio As you put your portfolio, vaccoundidor on Actions" and select "Save Draft" until you are confident your submission form is complete.	Submitted December 10, 2024 by Test Faculty
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 <u>will not be saved</u> .	
The due date for your submission is no later than February 1, 2025, at 11:59 p.m.	
Note: The maximum file size is 1GB. You will receive an error message "Unable to upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.	
Curriculum Vitae	

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.

<text><complex-block> Automatical and a control of a</complex-block></text>	vities Reports Workflow	Vorkflow. The report will be date and		
<complex-block></complex-block>	If your discipline requires a specific format, y		Due April 1st, 2025 @ 11:59 PM	Letter Cancel Actions
<complex-block> For a state of the state of the</complex-block>				
<complex-block><complex-block> Prime and prim and prime and prime and prime and prime and prime and prime</complex-block></complex-block>	ast Updated	²M		
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<text><text><section-header><section-header>networks and a setual data and a setual data</section-header></section-header></text></text>	CV 2024 Test Faculty.pdf (249.	<u>66 KB)</u>		
<text><section-header><section-header> meta weta and the stand sta</section-header></section-header></text>	Probationary Review Na	rrative		
<section-header><section-header><section-header><section-header> Image: Section 11 Image: Section 12 Image: Section 12 <tr< td=""><td>Use the space below to upload a narrative fil review.</td><td>e to be considered for your probationary</td><td></td><td></td></tr<></section-header></section-header></section-header></section-header>	Use the space below to upload a narrative fil review.	e to be considered for your probationary		
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Pecember 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2021-2022 Last Updated December 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2020-2021 (and older) Last Updated December 3rd, 2024 at 12:03 PM Upload any other Supporting Documents (e.g., support letters, etc.) TEST FACULTY JDEA Teaching Essentials Reports zip (541.85 KB) TEST FACULTY JDEA Teaching Essentials Reports zip (541.85 KB) Comparison of the Supporting Documents (e.g., support letters, etc.) Scholarly Creative Test Faculty 2024.docx (83.88 KB)	Review Activity Report for Academ	nic Year 2022-2023		
Last Updated December 3rd, 2024 at 12:03 PM Review Activity Report for Academic Year 2020-2021 (and older) Last Updated December 3rd, 2024 at 12:03 PM Upload any other Supporting Documents (e.g., support letters, etc.) TEST FACULTY IDEA Teaching Essentials Reports zip (541.85 K9) W Scholarly Creative Test Faculty 2024.docx (83.88 K8)	Last Updated December 3rd, 2024 at 12:0	I3 PM		
	Review Activity Report for Academ	nic Year 2021-2022		
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	TEST FACULTY_IDEA Teachin	ng Essentials Reports.zip (541.85 KB)	Teaching Librarianship Test Facu	lty 2024.docx (83.68 KB)
	Scholarly Creative Test Facul	ty 2024.docx (83.61 KB)	Service Test Faculty 2024.docx	83.68 KB)
	Supporting Documents Test	Faculty 2022 docy (83 61 KP)		ilty 2024 pdf (334 90 KB)

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 <u>APS 900417</u> (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	
Comparison of Comparison Comparison Committee Committee Comparison Committee Com	CANCEL Actions ~
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 <u>APS 900417</u> , Section 5.03 for more details.	
Vear 2024	

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.

vities Rej	ports	Workflow							
epartmen	t Promot	ion and Tenur	e Advisory Committ	ee Step - Due Ap	pril 1st, 2025 @ 1	1:59 PM	±	CANCEL	Actions
Candidate: Te	est Faculty					e Test Facult			/
							Save Draft		
My Respo	onse					0	Publish My	Response to Cha	ir
Please	acknow	wledge you	r review of the						
portfoli	io is co	mplete by t	yping your nam	e					
below.	Then, o	click on "Ad	tions" and sele	ct					
"Publis	sh My F	lesponse to	Chair" to finish	the					
proces	s.								
Note: For the Chair' does r	e DPTAC Ch not apply.	air, the Acknowledgn	ent field and "Publish My Re	sponse to					
Acknow	wledgement								
DPT/	AC Member	\geq]				
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		Reports artment Pron date: Test Facul	Workflow notion and Tenure	Advisory Com	mittee Step - D	ue April 1s	t, 2025 @	ף 11:59 PM	2001 1.20 v 2022.0
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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.

Activities Reports Workflow		Activities Reports Workflow
Constitute: The April 1st, 2025 @ 11:59 PM Constitute: The April 1st, 2025 @ 11:59 PM Constitute: The April 1st, 2025 @ 11:59 PM	Actions *	C Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM Account Account and Economics Candidate: Test Faculty
V HANNER V Clair OFINC Calar Please acknowledge your review of the portfolio is complete by typing your name below. Then, click on "Actions" and select	Unresidewed	Pr MEMER Fr MEBOOKS Achonoledgement Theorems Member DPTIC EFTIC Member
"Publish My Response to Chair" to finish the process. Next Fred To Table Chair to Advanceduption faild and "Publick My Response to Chair" dawn set reply:		
 V Member 0713C 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. New France 071C Charles to Adamidgenet 64 and "Adde by Response to charles and account of the complexity of the complexity of the process. 	Lat Inviend Sounds 19, 2024	

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	Letter Cancel Actions
Candidate: U Test Faculty	Submitted December 9, 2024 by Test Facuity
Committee Members and Responses	1/2 Reviewed
BY MEMBER BY RESPONSE	
Chair DPTAC	Unreviewed
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	

Activities Reports Workflow	
Compartment Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM Committee Members and Responses Candidate: Test Faculty	CANCEL Actions
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	

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.

Candidate: Test Faculty	
> Faculty	Submitted December 10, 2024 by Test Faculty
> Committee Members and Responses	\bigcirc Open \times $\langle \ominus \rangle = \uparrow [$ \bigcirc Wor \rightarrow Tenure & Prom $\rightarrow \lor [$ \bigcirc Search Tenure & Promotion D ρ
This Committee's Response Department Promotion and Tenure Advisory Committee (DPTAC) Probationary Review Recommendation The contents of this Committee Chair Form constitute the DPTAC's submission for the probationary review evaluation. One 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 the DPTAC submission is no later than April 1, 2025, at 11:59 pm. Note: The DPTAC Chair does not complete the same acknowledgment step as the committee members.	Organize New folder ERICS NOTES (E) Name DPTAC Poot-Tenure Vote Evaluation Test Faculty 2022 10/17/2 Joptan Constraintentiaadun Letter Test Faculty 2022 10/17/2 Spetilight-V100 DPTAC Recommendation Letter Test Faculty 2022 10/17/2 Director Libray DPTAC Recommendation Letter Test Faculty 2022 10/17/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Wides DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2024 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2044 11/12/2 Director Libray DPTAC Recommendation Letter Test Faculty 2044 11/12/2 Director Libray DIrector Written Summay Test Faculty 2044 11/12/2
Please upload the DPTAC written summary in the space provided below. DPTAC written summary *	sher PDF PDF + Copy

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.

Activities Reports Workflow	
Candidate: Test Faculty	
> Faculty	Bave Draft
> Committee Members and Responses	- C Submit to Department Chair/School Director
	Send Back to Previous Step
This Committee's Response	
Department Promotion and Tenure Advisory	
Committee (DPTAC) Probationary Review	
Recommendation	
The contents of this Committee Chair Form constitute the DPTAC's submission for the probationary review evaluation.	
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 the 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.	
Please upload the DPTAC written summary in the space	
provided below.	
DPTAC written summary *	
Drop files here or click to upload	
DPTAC Written Summary Test Faculty 2nd, 4th, 5th Year Review 2024, odf (334.90 KB)	

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.

Activities	Reports	Workflow			
		otion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM v click on "Actions" and select	*	CANCEL	Actions ~
	ublish My ocess.	Response to Chair" to finish the			
	Acknowledgem				
This Co	mmittee's Re	sponse			Saved Draft by Chair DPTAC
Co	•	Promotion and Tenure Advisory DPTAC) Probationary Review Jation			
	contents of this C ationary review e	ommittee Chair Form constitute the DPTAC's submission for the valuation.			
have	completed the re	embers have acknowledged their review is complete, and you quired fields below, click on "Actions" and select "Submit to hool Director" to advance the review to the next step.			
The p.m.	due date for the	DPTAC submission is no later than April 1, 2025, at 11:59			
	: The DPTAC Ch nittee members.	air does not complete the same acknowledgment step as the			
	ase upload ti vided below.	ne DPTAC written summary in the space			
	DPTAC written	summary			
		Witten Summary Test Faculty 2nd - 4th, 5th Year Review 2024.odf / 334,90			

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.

ivities Reports	Workflow					
Department Pro	motion and Tenure Advisory	Committee Step - Due April 1st, 2025 @ 11:59 PM		* C	ANCEL	Actions
Candidate: Test Fac	ulty					
> Faculty			💾 Sav	e Draft		
			Cr Sub	omit to Depar	tment Chair	/School Director
> Committee Me	mbers and Responses			-	_	
			🏫 Ser	nd Back to Pre	evious Step	
This Committe			_			
	t Promotion and Tenure	2				
	(DPTAC) Probationary	Review				
Recomme						
The contents of this probationary review	Committee Chair Form constitute the DPTA evaluation.	AC's submission for the				
Once all committee have completed the Department Chain	members have acknowledged their review is required fields below, click on "Actions" a 'School Director" to advance the review to	is complete, and you and select "Submit to the next step.				
	he DPTAC submission is no later than Ap					
	Chair does not complete the same acknowle s.	edgment step as the				
Please unload	the DPTAC written summary in	the space				
provided belo						
DPTAC writte	n summary *					
	,	Drop files here or click to upload				
문	TAC Written Summary Test Faculty 2nd, 4th 24.pdf (334.90 KB)	n, 5th Year Review				
	Reports Workflow	ry Committee Step - Due April 1st, 2025 @ 11:59 PM	*	CANCEL	Action	15 ×
Candidate:	Test Faculty				Select to e	expand Actions menu
> Faculty	,	Are you sure you want to Submit to Department Chair/School Director?		Su		mber 10, 2024 by Test Faculty
> Commi	ttee Members and Responses					1/2 Reviewed
This Co	ommittee's Response					
Depa	rtment Promotion and Tenu	ure Advisory				
	mittee (DPTAC) Probational	ry Review				
	mmendation					
probation	ents of this Committee Chair Form constitute the E ary review evaluation.					
	committee members have acknowledged their rev pleted the required fields below, click on "Action ent Chair/School Director" to advance the revie					
p.m.	date for the DPTAC submission is no later that					
Note: Th committe	e DPTAC Chair does not complete the same ackn e members.	nowledgment step as the				
	upload the DPTAC written summary ed below.	/ in the space				
provid		/ in the space				
provid	ed below.	y in the space Drop files here or click to upload				
provid	ad below. AC written summary *	Droo files here or click to unload				
provid	ed below.	Droo files here or click to unload				

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.

Activities Reports Workflow	
C Department Promotion and Tenure Advisory Committee Step - Due April 1st, 2025 @ 11:59 PM Candidate: Test Faculty	Actions ~
> Faculty	Bave Draft
> Committee Members and Responses	Submit to Department Chair/School Director Send Back to Previous Step
This Committee's Response	
Department Promotion and Tenure Advisory	
Committee (DPTAC) Probationary Review	
Recommendation	
The contents of this Committee Chair Form constitute the DPTAC's submission for the probationary review evaluation.	
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 the 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.	
Please upload the DPTAC written summary in the space	
provided below.	
DPTAC written summary *	
Drop files here or click to upload	
DPTAC Written Summary Test Faculty 2nd, 4th, 5th Year Review 2024.odf (334.90 KB)	

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.

ctivities Reports Workflow					
forkflow Tasks ep track of outstanding tasks in your inbox, and view y	your review history.				
nbox					
Show Filters (0)					
NAME - S	TEP - DEPAI	RTMENT -	CANDIDATE -	DUE DATE 12 -	DATE RECEIVED -
		No Data to Dis	play		
History (5)					
NAME	CURRENT STEP	CANDIDATE		DUE DATE	ACTION
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty Records	Test Faculty		May 31, 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	•
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Department Chair/School Director	Test Faculty		May 1, 2025 @ 11:59 PM	
TEST Post-Tenure Review - Spring 2025	Faculty	Test Faculty		February 1, 2025 @ 11:59 PM	Recall
TEST Tenure and/or Promotion Review - Spring 2025	Dean	Test Faculty		February 25, 2025 @ 11:59 PM	Download

Department Chair/School Director Step

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

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

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

Activities Manage Data Report	s Workflow -				
Workflow Tasks Keep track of outstanding tasks in your inbox, and v	riew your review history.				
hbox (2)					
► Show Filters (0)					
NAME *	STEP -	DEPARTMENT *	CANDIDATE -	DUE DATE 12 -	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 (2nd, 4th, and 5th year) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 10, 2024 @ 3:40 PM
History (11)					
NAME	CURRENT STEP	CANDIDATE		DUE DATE	ACTION
TEST Probationary Faculty - (Third-Year Straw Pe Spring 2025	oll) - Faculty Records	Test Faculty		May 31, 2025 @ 11:59 PM	•

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

Workflow Sub		Tasks	flow 🔺				BUL	K DOWNLOAD EX	(PORT VIEW
Filters Status: 0	open ×								
CANDIDATE 12 -	TEMPLATE -	SCHEDULE -	STATUS T -	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.

ates below are disp	laying in US/Central.								
Filters: None	\frown	\frown							
		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 vi	ew your review history.				
Inbox (2)					
► Show Filters (0)					
NAME *	STEP -	DEPARTMENT *	CANDIDATE -	DUE DATE 12 -	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 (2nd, 4th, and 5th year) - Spring 2025	Department Chair/School Director	University Wide	Faculty, Test	May 1, 2025 @ 11:59 PM	December 10, 2024 @ 3:40 PM
History (11)					
NAME	CURRENT STEP	CANDIDATE		DUE DATE	ACTIONS
TEST Probationary Faculty - (Third-Year Straw Pol Spring 2025	I) - Faculty Records	Test Faculty		May 31, 2025 @ 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 20 above. This is followed by the Department Promotion and Tenure Advisory Committee (DPTAC) section contains their written summary.

Activities Manage Data Reports Workflow -	
✓ Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM	Actions ×
Candidate: Test Faculty	
Faculty	Submitted December 10, 2024
Probationary Review Portfolio	by Test Faculty
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 <u>will not be saved</u> .	
The due date for your submission is no later than February 1, 2025, at 11:59 p.m.	
Note: The maximum file size is 1GB. You will receive an error message "Unable to upload file.cococ" 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 probationary review. The report below is generated from the data entered in Activities. When preparing your submission, make sure to preview the report. If needed, navigate to Activities to make any necessary edits. Then, return to your review in Workflow and refresh the report.	
Note: The report will not automatically refresh when the Activities data is changed. You <u>must</u> refresh the report in Workflow. The report will be date and time stamped with the latest refresh date.	
If your discipline requires a specific format, you can use the upload field to attach a copy of your current vita.	
Vita	
Last Updated December 10th, 2024 at 1:50 PM	
CV Upload	
CV 2024 Test Faculty.pdf (249.66 KB)	
•	
▼	

Activities Manage Data Reports Workflow -	
Candidate: Test Faculty	Actions ~
> Faculty	Submitted December 10, 2024 by Test Faculty
Department Promotion and Tenure Advisory Committee Please upload the DPTAC written summary in the space provided below.	Submitted December 10, 2024 by Chair DPTAC
DPTAC 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.

	C Open	
Faculty	C Open ← → ✓ ↑	Search Tenure & Promotion D P
Department Promotion and Tenure Advisory Committee	Organize 👻 New folder	III • 🔟 💡
Department Chair/School Director Probationary Review Recommendation The contents of this form constitute the Department Chair/School Director's feedback for the facady member. The due date for your submission is no later than May 1, 2025, at 11:59 p.m. Orce you have complete the required fields below, click on "Actions" and select "Submit" to complete the review process. Please upload the Department Chair/School Director's review in the space provided below.	ERICS NOTES (E) Nume ERICS NOTES (E) Upgs Chain nay year resultant na	uhy 2022 &/19/202 10/172 10/172 17814 Faculty 2022 &/19/20 17815 Faculty 2022 10/172 17814 Faculty 2024 11/12/2 1814 Faculty 2024 11/12/2 1814 Faculty 2024 11/12/2 1814 Faculty 2024 11/12/2 1814 Faculty 2024 11/12/2
Department Chair/School Director review • Droo faes This field is required	PDF	

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.

Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM Candidate: Test Faculty	CANCEL Actions
> Faculty	
> Department Promotion and Tenure Advisory Committee	Submit to Faculty Records Send Back to Previous Step
Department Chair/School Director Probationary	
Review Recommendation	
The contents of this form constitute the Department Chair/School Director's feedback for the faculty member.	
The due date for your submission is no later than May 1, 2025, at 11:59 p.m.	
Once you have completed the required fields below, click on "Actions" and select "Submit" to complete the review process.	
Please upload the Department Chair/School Director's review in	
the space provided below.	
Department Chair/School Director review *	
Drop files, here or click to voload	
<u></u>	

Activities Manage Data Reports Workflow -		
Candidate: Test Faculty	ay 1st, 2025 @ 11:59 PM	CANCEL Actions Select to expand Actions menu
> Faculty	Are you sure you want to Submit to Faculty Records?	Submitted December 10, 2024 by Test Faculty
Department Promotion and Tenure Advisory Comm	NO	Submitted December 10, 2024 by Chair DPTAC
Department Chair/School Director Pr	obationary	
Review Recommendation		
The contents of this form constitute the Department Chair/School Di the faculty member.	rector's feedback for	
The due date for your submission is no later than May 1, 2025, a	at 11:59 p.m.	
Once you have completed the required fields below, click on "Actio "Submit" to complete the review process.	ns" and select	
Please upload the Department Chair/School Direc	tor's review in	
the space provided below.		
Department Chair/School Director review *		
	Drop files here or click to upload	
Dept Chair Recommendation Letter Test Faculty 20	24.pdf (334.90 KB)	

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.

Activities Manage Data Reports Workflow -	
C Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM Candidate: Test Faculty	Actions ~
> Faculty	E Save Draft
Department Promotion and Tenure Advisory Committee	Submit to Faculty Records Send Back to Previous Step
Department Chair/School Director Probationary	
Review Recommendation	
The contents of this form constitute the Department Chair/School Director's feedback for the faculty member.	
The due date for your submission is no later than May 1, 2025, at 11:59 p.m.	
Once you have completed the required fields below, click on "Actions" and select "Submit" to complete the review process.	
Please upload the Department Chair/School Director's review in	
the space provided below.	
Department Chair/School Director review *	
Drop files here or click to upload	
Casel Chair Recommendation Letter Text Faculty 2024 out (334.99 KB)	

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.

			0		,	
Activities	Manage Data	Reports	Workflow -			
Workflow 1 Geep track of ou	Tasks tstanding tasks in your	inbox, and view y	our review history.			
Inbox (4)						
History (9)						
NAME			CURRENT STEP -	CANDIDATE	DUE DATE	ACTIONS
TEST Tenure	and/or Promotion Review	w - Spring 2025	Dean	Test Faculty	February 25, 2025 @ 11:59 PM	•
TEST Probatio Spring 2025	onary Faculty - (Third-Ye	ear Straw Poll) -	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	•
Spring 2025	onary Faculty (2nd, 4th,	and 5th year)	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	₩ B
Test Spring 20	023 Annual Review - Pro	obationary Facult	y Completed	Me	September 20, 2022 @ 11:59 PM	Recall
	y Evaluation System (FE ure-track) (DEMO	S) Review	Completed	Me	May 1, 2023 @ 11:59 PM	Download