SHSU Watermark Workflow Annual Faculty Evaluation System (FES) Review (T/TT Faculty) Process Help Guide

Watermark Workflow for Annual Faculty Evaluation System (FES) Review of tenured and tenure-track faculty follows the multistep process illustrated in the flowchart below. It is a simple process beginning at the Faculty submission step, which is evaluated at the Department Chair/School Director, and is finally deposited into Faculty Records.



Email Messages

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

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

Process:	TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025
Due Date:	Saturday, February 1, 2025 11:59 PM CST

In accordance with <u>APS 820317</u>, 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/cd4a7110-1d97-4dd7-b5fa-ced62eea9241/ step/1e69806b-3238-4f64-9e0d-3f55a4149b8d/assignee/2390354? embed=workflow:assignee,workflow:subject,workflow: response&subProcessId=c98175e8-e088-4dbe-b437-3b9d3dffb3bd&orgId=1660&personId=2390354

The next step will be the Department Chair/School Director. Once the tenured/tenure-track faculty member submits their materials in Watermark Workflow, the Department Chair/School Director will receive an automated email:

Dear Bearkat Test,

The following submission is now ready for your review:

Process:	TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025
Candidate:	Test Faculty
Due Date:	Thursday, May 1, 2025 11:59 PM CDT

In accordance with <u>APS 820317</u>, the department chair/school director shall review the performance of faculty members and submit an FES summary report for each faculty member. Be sure to incorporate administrative release (FES X) supervisor ratings, when applicable, in the annual FES review. Please reference the <u>training resources</u> on the Academic Affairs Watermark website for more information.

The <u>FES summary report</u> and <u>FES X form</u> (when applicable) 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/cd4a7110-1d97-4dd7-b5fa-ced62eea9241/ step/97f81e4b-fa95-4b75-94d9-651505945058/assignee/2357490? embed=workflow:assignee,workflow:subject,workflow: response&subProcessId=c98175e8-e088-4dbe-b437-3b9d3dffb3bd&orgId=1660&personId=2357490 While the automated email will provide a link to Watermark, you can also navigate to Watermark following the login instructions below.

Logging into Watermark Faculty Success

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

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✓ General Credentials/Expertise				- 1
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			- 1
 Career Information 				- 1
Professional Positions	Consulting			- 1
Administrative Assignments	Professional Memberships			- 1

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.)

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► Show Filters (0)					
NAME IX -	STEP -	DEPARTMENT -	CANDIDATE -	DUE DATE -	DATE RECEIVED -
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TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me		
TEST Post-Tenure Review - Spring 2025	Faculty	University Wide	Me		Y 30
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 @ 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.

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Workflow Tasks Keep track of outstanding tasks in your inbox, and view your review history.							
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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 @ 4:4 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	čandidate -	Enter Candidate		DATE 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	ACTIO
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	ur review history.			
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✓ 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	Ŀ
Schedule Post-Tenure Review - Spring 2024	Completed	Me	November 11, 2023 @ 11:59 PM	Download

Watermark Workflow Annual (FES) Review Process Steps

Faculty Step

4. Under the Workflows Tasks Inbox click on Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025 to begin entering your portfolio.

Activities Reports Workflow					
Workflow Tasks Keep track of outstanding tasks in your inbox, and vi	ew your review history.				
Inbox (3)					
► 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	December 16, 2024 @ 8:29 AM
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me	January 13, 2025 @ 11:59 PM	December 16, 2024 @ 8:29 AM
TEST Probationary Faculty (First-Year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	December 16, 2024 @ 8:51 AM
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	December 16, 2024 @ 3:41 PM

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).

Activities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM	CANCEL Actions ~
Candidate: Test Faculty	
✓ Reports Have Been Run and Auto-Attached	
The following reports have been attached to this submission on your behalf.	
 Vita - Last updated November 11, 2024 at 9:55 AM Review Activity Report for Calendar Year 2024 - Last updated November 11, 2024 at 9:54 AM 	
To ensure that the data included for your submission is current, we recommend that you refresh these reports. You ca individual report below, or you can use the "Refresh All" button here to refresh the reports listed above.	an do this by selecting the "Refresh Report" button next to each
	REFRESH ALL

- 6. When working on your Annual Faculty Evaluation System (FES) 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.
- Once you have completed your review portfolio, you should now click on "Actions" and select "Submit to Department Chair/School Director" to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded <u>will not be saved</u>.
- 8. Note: you will see the due date for your submission in the case of the Annual Faculty Evaluation System (FES) Review, 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. Annual Faculty Evaluation System (FES)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.

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Last Updated November 11th, 2024 at 9-55 AM				

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



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

Activities Reports Workflow	
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Curriculum Vitae Use the space below to generate a CV from the Watermark system to be considered for your annual review. The report below is generated from the data entered in Activities, to Activities to make any necessary edits. The preview the report. In review, may also the Activities and the report is working. Then, return to your review it Workflow and refresh the report. 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.	Organize * New folder SH50 Viewalk Face Name > Hormank Face 222 > Training Documents 202 > Undergradukte Reace 202 > Watermark Reports 202 > Ben Recommendation Letter Text Faculty 2024.docx > FFS Ferms 2022 Dean Recommendation Letter Text Faculty 2024.docx > Toruse SpraceS Wortform Dean third-yaar review feedback Text Faculty 2024.docx > Toruse SpraceS Wortform Dean third-yaar review feedback Text Faculty 2024.docx
Vita Last Updated December 16th, 2024 at 4:29 PM C C C V Upload Drop fit	

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

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15. The next section of the Annual FES Review Portfolio is a section for including an Annual FES Review Narrative. This is an optional step, and can be done either by uploading a file to the Annual FES 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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Annual FES Review	Narrative		
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Alternatively, you may input your na	rative directly into the text box below.		
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16. The final section of the Faculty Step is the Annual Faculty Evaluation System (FES) Review Portfolio Documents area. This section provides a Review Activity Report generated from your Activities records based upon the calendar year (this report's date range will span from January 1st until the December 31st of the reviewed year.) This report will not automatically refresh when the Activities data is added or changed. You must refresh the report in Workflow reviews. Each report will be date and time stamped with the latest refresh date.

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

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Annual Faculty Evaluation System (FES) Review Portfolio Documents Use the space below to upload documents to be considered for your annual FES review. The report below is generated from the data entered in Activities. A document upload field has also been provided to include any supporting documents needed to complete your review portifics.	
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.	
Report By Calendar Year	
Review Activity Report for Calendar Year 2024	
Last Updated November 11th, 2024 at 9:54 AM	

17. 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 content to update the report.

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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.



18. 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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complete your	as also been provided to include any supporting documents nee review portfolio.	eded to			
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n Review Act	Mode - Armal Actively Report	Start Date 1/1/2024 End Date 1/2/31/2024	rk k	<u>م</u>	<u>ې</u> מעא מ

19. 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.

ctivities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM	CANCEL Actions
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Annual Faculty Evaluation System (FES) Review Portfolio Documents	
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upload field has also been provided to include any supporting documents needed to complete your review portfolio. 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.	
Report By Calendar Year	
Review Activity Report for Calendar Year 2024	
Last Updated December 16th, 2024 at 4:58 PM	
Upload any other Supporting Documents (e.g., support letters, etc.)	
Drop files her	re or click to upload
	j.
Activities Reports Workflow	
Faculty Step - Due February 1st, 2025 @ 11:59 PM	La CANCEL Actions -
Candidate: Test Faculty: I voluptatibus recusandae aut voluptas dolores quo alque segui hic	
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Characters . 873/991	Training Documents Supporting Documents Test Faculty 2022.pdf Undergraduate Resea Undergraduate Resea
Annual Faculty Evaluation System (FES)	Watermark Faculty A Watermark Reports Watermark R
Review Portfolio Documents	Workflow Konstanting test Hoculty 2022, ddt Konstanting test Hoculty 2024, ddcx Konstanting test Hoculty 2024, ddcx Konstanting test Hoculty 2024, ddf Konstanting test
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Complete your tester portuge. 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.	File name: Supporting Documents Test Faculty 202 v All Files (*.*) v Upload from mobile Open Cancel
Report By Calendar Year	
Review Activity Report for Calendar Year 2024	
Last Updated December 18th, 2024 at 4:58 PM	
Upload any other Supporting Documents (e.g., support letters, etc.)	
Droo file PD	F ct. to upload
·	+ Copy

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

If you wish to provide files appearing in folders and subfolders you are encouraged to save these files and structure 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.



Name ^	Date modified	Туре	Size
Scholarship	12/14/2022 7:30 AM	File folder	
Service	11/22/2022 9:45 AM	File folder	
Teaching	11/22/2022 9:45 AM	File folder	
C Scholarship.zip	12/14/2022 8:08 AM	Compressed (zipped) Folder	518 KB
	Type: Compressed (zipped) Folder Size: 517 KB Date modified: 12/14/2022 8:08 AM		

21. Faculty can click on Actions in the upper right and choose Save Draft, to retain any entries and file uploads they have done, but prior to a final submission to Department Promotion and Tenure Advisory Committee (DPTAC).

aculty Step - Due February 1st, 2025 @ 11:59 PM		Lettons
andidate: Test Faculty	Characters : 873/99999	Save Draft
Annual Faculty Evaluation System (FES)		
Review Portfolio Documents		Submit to Department Chair/School Director
se the space below to upload documents to be considered for your annual view. The report below is generated from the data entered in Activities. A do load field has also been provided to include any supporting documents ner mplete your review portfolic.	ocument	
ote: The report will not automatically refresh when the Activities data i nanged. You must refresh the report in Workflow. The report will be da me stamped with the latest refresh date.		
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Review Activity Report for Calendar Year 2024 Last Updated December 16th, 2024 at 4:58 PM	Drop files here or click to upload	Creative Test Faculty 2024.docx (83.61 KB)
Review Activity Report for Calendar Year 2024 Last Updated December 16th, 2024 at 4:58 PM C Upload any other Supporting Documents (e.g., support letters, etc) C	Drop files here or click to upload	Creative Test Faculty 2024.docx (83.61 KB)
Last Updated December 16th, 2024 at 4:58 PM Upload any other Supporting Documents (e.g., support letters, etc Supporting Documents Test Faculty 2024,pdf (334.90 KB)	Drop files here or click to upload	

22. Once a faculty member has completed all of their entries and uploads for the Faculty Step, click on the Actions – Submit to Start Portfolio Evaluation and click Yes in the following popup window.

Candidate: Test Faculty			
	Characters : 873/99999	🗎 Save Draft	
Annual Faculty Evaluation System (FES))	C* Submit to Department Chair/Schoo	Director
Review Portfolio Documents			
Jse the space below to upload documents to be considered for your annue eview. The report below is generated from the data entered in Activities. A pload field has also been provided to include any supporting documents n omplete your review portfolo.	document		
lote: The report will not automatically refresh when the Activities dat. hanged. You must refresh the report in Workflow. The report will be o ime stamped with the latest refresh date.			
Report By Calendar Year			
Review Activity Report for Calendar Year 2024			
Last Updated	c		
December 16th, 2024 at 4:58 PM	C		
Upload any other Supporting Documents (e.g., support letters, e	etc.)		
	Drop files here or click to upload		
Supporting Documents Test Faculty 2024,pdf (334,90 KB	31 and Scholarly C	treative Test Faculty 2024.docx (83.61 KB)	â
Supporting Documents Test Faculty 2024.pdf (334.90 KB		reative Test Faculty 2024.docx (83.61 KB) at Faculty 2024.docx (83.68 KB)	â â
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23. 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 y	our review history.			
> Inbox				
✓ History (28)				
NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025	Department Chair/School Director	Me	May 1, 2025 @ 11:59 PM	•
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty Records	Me	May 31, 2025 @ 11:59 PM	Recall
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Faculty Records	Me	May 31, 2025 @ 11:59 PM	Download
TEST Post-Tenure Review - Spring 2025	Faculty Records	Me	May 31, 2025 @ 11:59 PM	•

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 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 - Sam Houston State Unver Review a guide to manage your activities.	SEARCH Search Tips Rapid Reports DATA SHARE SETTING
General Credentials/Expertise	
Personal and Contact Information	Licensures and Certifications
Biography and Expertise	Awards and Honors
	Media Appearances, Contributions, and Interviews
Degrees	

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.

Vorkflow Tasks					
eep 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 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 17, 2024 @ 8:18 AM
11 (10)					
History (13)					
NAME	CURRENT STEP	CANDIDATE		DUE DATE	ACTIONS
		CANDIDATE Test Faculty		DUE DATE May 31, 2025 @ 11:59 PM	ACTIONS
NAME TEST Probationary Faculty - (Third-Year Straw Poli)	- Faculty Records				

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.

Activities N	lanage Data 🛛 F	Reports Work	flow 🔺						
Vorkflow Sub	laying in US/Central.	Tasks	ssions				BUL	K DOWNLOAD EX	PORT VIEW
CANDIDATE 17 -	TEMPLATE -	SCHEDULE -	status 🕈 👻	COLLEGE -	DEPARTMENT -	STEP -	REVIEWER -	DUE DATE -	ACTION
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.

Workflow Sub Dates below are disp								LK DOWNLOAD	PORT VIEW
Filters: None		~							
	TEMPLATE		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 •				
Norkflow Tasks					
eep track of outstanding tasks in your inbox, and vi	ew your review history.				
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	•

1. In the Department Chair/School Director step, the first section will contain the Faculty's FES Review Portfolio, with all reports, entries, and links to uploaded files.

Department Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM	LACTIONS Y
If your discipline remuires a specific format, you can use the upload field to attach a copy Candidate: UTest Faculty	Actions *
Vita	
Last Updated December 16th, 2024 at 4:29 PM	
CV Upload	
CV 2024 Test Faculty.pdf (249.66 KB)	
Annual FES Review Narrative Use the space below to upload a narrative file to be considered for your annual FES	
Page the space below to upload a namative life to be considered to your annual r LS review.	
Annual FES Review Narrative Upload	
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Dartment Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM Jidate: Test Faculty Annual Faculty Evaluation System (FES)	La CANCEL Actions
oartment Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM didate: Test Faculty Annual Faculty Evaluation System (FES) Review Portfolio Documents	Letions
Deartment Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM didate: Test Faculty Annual Faculty Evaluation System (FES) Review Portfolio Documents Jes the space below to upload documents to be considered for your annual FES eview. The report below is generated from the data entered in Activities. A document	Letions Actions
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Annual Faculty Evaluation System (FES) Review Portfolio Documents use the space below to upload documents to be considered for your annual FES eview. The report below is generated from the data entered in Activities. A document upload field has also been provided to include any supporting documents needed to complete your review portfolio. Note: The report will not automatically refresh when the Activities data is hanged. You must refresh the report in Workflow. The report will be date and ime stamped with the latest refresh date. Report By Calendar Year	Lations
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Annual Faculty Evaluation System (FES) Annual Faculty Evaluation System (FES) Review Portfolio Documents Use the space below to upload documents to be considered for your annual FES eview. The report below is generated from the data entered in Activities. A document upload field has also been provided to include any supporting documents needed to complete your review portfolio Vote: The report will not automatically refresh when the Activities data is thanged. You must refresh the report in Workflow. The report will be date and the stamped with the latest refresh date. Review Activity Report for Calendar Year 2024 Last Updated December 16th, 2024 at 4:58 PM Upload any other Supporting Documents (e.g., support letters, etc.)	Scholarly Creative Test Faculty 2024.docx (83.61 KB)
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Antment Chair/School Director Step - Due May 1st, 2025 @ 11:59 PM Anton of data former of conference of the marked of the marke	Scholarly Creative Test Faculty 2024.docx (83.61 KB)

5. The second and final section is the Department Chair/School Director step which contains fields for the department chair to upload required documents including a <u>FES</u> <u>Summary Report (FES 5)</u> that has been signed by both the department chair (or administrative equivalent) and the faculty member. There is also an area for the department chair to provide optional feedback to the faculty member either as a file upload, or directly in a text area box.

M CANCEL Actions
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6. In some cases, the Department Chair/School Director step will also require the upload of an <u>FES X Form</u>. Faculty members with a portion of their workload as administrative

release time will need a completed FES X Form to provide their final FES score. Areas for uploading the FES X Form (when applicable) and an optional upload space for any FES X justification are provided at the bottom of the page.

Acti	vities	Manage Data	Reports	Workflow	-													
<	Depar	tment Chair/Scl	nool Directo	r Step - Due	May 1	st, 2025	5 @ 11:59 PN	1				*	CAN	CEL	Actio	ns		~
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	FES X Form (when applicable) Please upload a signed copy of the FES X form with input from the administrative						Ì	_	& Promotior v File name: F	/	Test Facult	ty 2024.pdf	~ A	III files (*.*)		~	>	
	assig depa	nment supervisor (APS) rtment chair and shall b he faculty member.	820317). The FE	S X form shall be	completer	d by the			/			Uploa	ad from mol	bile	Open		Cancel	
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7. Once a Department Chair/School Director has uploaded any files they may choose the Save Draft option from the Actions drop-down menu. This will retain any work for a future session awaiting any additional uploads or feedback prior to submission.

	ctor Step - Due May 1st, 2025 @ 11:59 PM	CANCEL Actions ~
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FES Summary Report *		
,	Drop files here or click to upload	Complete to Faculty Records
FES Summary Report For	m Test Faculty 2024.pdf (78.94 KB)	Send Back to Previous Step
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Use the space below to upload the Depart (optional) to the faculty member regarding teaching, research and/or scholarly activit	the faculty member's performance for	
A 10	directly into the text box below.	
Alternatively, you may input your feedback		
Alternatively, you may input your feedback	feedback (optional)	

8. Once feedback is completed, the Department Chair/School Director can select the Complete to Faculty Records option and click Yes on the following popup box. This will complete the Annual Faculty Evaluation System (FES) Review process for this faculty member and move the review to the Faculty Records Step.

		1st, 2025 @ 11:59 PM			CANCEL	Actions
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9. There is an option for 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.

ivities	Manage Data	Reports	Workflow 👻								
Depart	tment Chair/Sc		r Step - Due May		I:59 PM		ſ	A CANCE		Actions	÷
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	FES X Justification D administrative perfo		he supervisor providing	a rating of the							
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10. Once the Department Chair/School Director has completed their submission to Faculty Records, the process will be moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are available – with Recall only taking place prior to the submission due date or following consultation with the Faculty Records Office.

Activities	Manage Data	Reports	Workflow 👻			
ep track of out	tstanding tasks in your i	nbox, and view ye	our review history.			
Inbox						
History (14)					
NAME			CURRENT STEP +	CANDIDATE	DUE DATE	ACTIONS
TEST Annual F 2025	Faculty Evaluation (NTT	Faculty) - Spring	Faculty	Test Faculty	February 1, 2025 @ 11:59 PM	•
TEST Probatio	nary Faculty (First-Year) - Spring 2025	Faculty	Test Faculty	February 1, 2025 (© 11:59 PM	•
TEST Tenure a	and/or Promotion Review	r - Spring 2025	Faculty	Test Faculty	January 13, 2025 @ 11:59 PM	•
TEST Probatio Spring 2025	mary Faculty - (Third-Ye	ar Straw Poll) -	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	•
TEST Probatio Spring 2025	mary Faculty (2nd, 4th,	and 5th year) -	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	•
	Faculty Evaluation Syste - Spring 2025	m (FES) Review	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	•
TEST Post-Ter	nure Review - Spring 20	25	Faculty Records	Test Faculty	May 31, 2025 @ 11:59 PM	Recall
TEST Promotio 2025	on for Non-Tenure Track	Faculty - Spring	Start Portfolio Evaluation	Test Faculty	January 14, 2025 @ 11:59 PM	Download
Test Spring 20)23 Annual Review - Pro	bationary Faculty	Completed	Me	September 20, 2022 @ 11:59 PM	•