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

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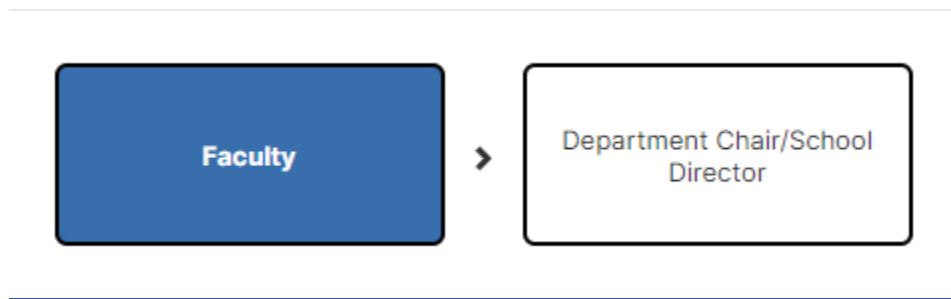


## Email Messages
Participants in the review process will receive automated emails with links from Watermark (addressed as Office of The Provost) when their step is initiated. The first step is the Faculty Step, and those faculty up for a review process will receive a message like the following:

Dear Test Faculty,

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

**Process:** Probationary Annual Review (First-Year Review) - Spring 2023 (Demo)

**Due Date:** Monday, February 6, 2023 11:59 PM CST

If you do not submit your materials by the due date, this will automatically advance to the Department Chair/School Director review.

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

The due date for your submission is **no later than February 6th, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

**SUBMIT REVIEW MATERIALS**

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*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/06af2374-c21f-455a-b78b-43aaf8e0d040/
step/20989d52-b902-4e97-a238-b5385ecba3c4/assignee/2390354?
embed=workflow:assignee,workflow:subject,workflow:
response&orgId=1660&personId=2390354

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

Dear Department Chair,

The following submission is now ready for your review:

| | |
|---|---|
| **Process:** | Probationary Annual Review (First-Year Review) - Spring 2023 (Demo) |
| **Candidate:** | Test Faculty |
| **Due Date:** | Monday, May 1, 2023 11:59 PM CDT |

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

A written summary for each individual candidate will be uploaded into the Watermark Faculty Success system by the department chair/school director for both the candidate and the dean/executive director's review. The due date for your submission is **no later than May 1st, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

**START REVIEWING**

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*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/deae1409-50a0-40b2-be2f-6d200a04ba39/step/ca6d19c5-fa5a-493d-8d55-0e6f8a0ab26b/assignee/2354062?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2354062

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

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## Logging into Watermark Faculty Success
1. Go to Watermark Faculty Success
   (https://login.watermarkinsights.com/connect/samhoustonstateuniversity )

2. NOTE: You may receive a two-factor authentication (DuoSecurity) prompt to connect via campus Single Sign-On (SSO).
3. Click the Workflow link in the navigation bar.
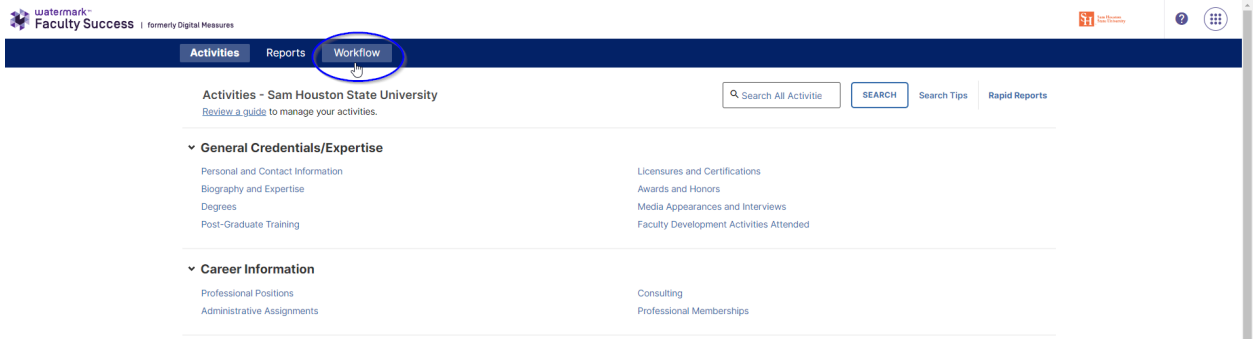


4. Select an item from Workflow Task Inbox to enter your step in the process.

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# Watermark Workflow First-Year Annual Review Process Steps

## Faculty Step

1. Click on Probationary Annual Review (First-Year) Review to begin entering your portfolio.



2. First-Year Review Portfolio screen provides area for uploading a current CV – or an automated CV can be provided based upon your activity's entries in Watermark.

**First-Year Review Portfolio**

As you build your portfolio, you can click on "Actions" and select "Save Draft" until you are confident your submission form is complete. Once you have completed your review portfolio, click on "Actions" and select "Submit to Department Chair/School Director" to advance your documents to the next step in the review process.

**The due date for your submission is no later than February 6th, 2023. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.**
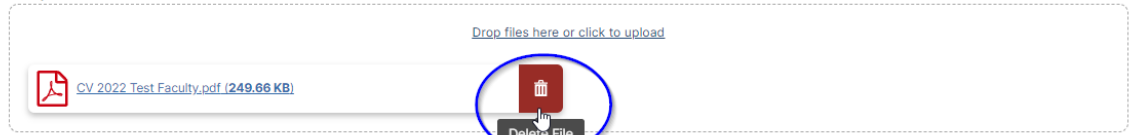
**Note:** The maximum file size is 1GB. You will receive an error message "Unable to upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.

**Curriculum Vitae**

Use the space below to upload a copy of your current curriculum vita to be considered for your first-year review.

Alternatively, you may generate a CV from the Faculty Success system. The report below is generated from the data entered in Activities. If you have not completed your Activities entries, use the upload field to attach a copy of your current vita.

**First-Year Review Narrative**

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

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

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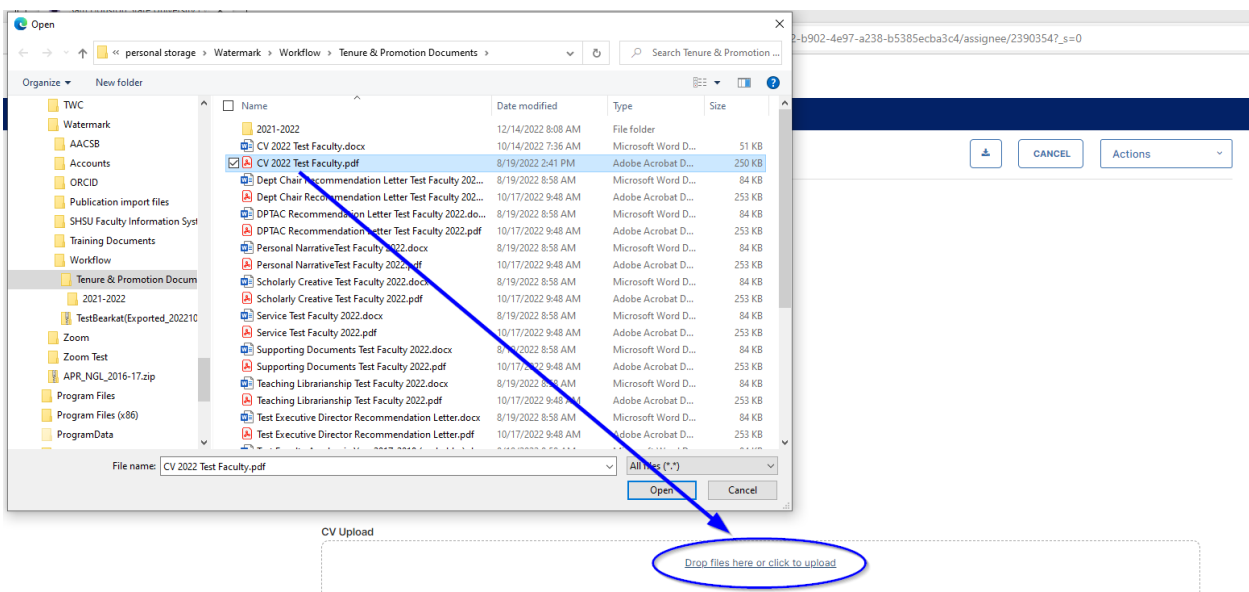


4. You can delete any files you have uploaded by mistake by clicking the trash can icon to the right of the file name.

**First-Year Review Portfolio**

As you build your portfolio, you can click on "Actions" and select "Save Draft" until you are confident your submission form is complete. Once you have completed your review portfolio, click on "Actions" and select "Submit to Department Chair/School Director" to advance your documents to the next step in the review process.

**The due date for your submission is no later than February 6th, 2023. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.**

**Note:** The maximum file size is 1GB. You will receive an error message "Unable to upload file.xxxxx" if the file is too large. You may simply click "Delete File" to remove it.

**Curriculum Vitae**

Use the space below to upload a copy of your current curriculum vita to be considered for your first-year review.

Alternatively, you may generate a CV from the Faculty Success system. The report below is generated from the data entered in Activities. If you have not completed your Activities entries, use the upload field to attach a copy of your current vita.

5. An alternative to uploading a CV is the Vita report feature of Watermark. This Vita is automatically generated by Watermark based on your entries in the Activity module of Watermark. You can view this automated CV by clicking on the Adobe Acrobat icon. If you make changes to your Activity Entries after starting a portfolio submission, but prior to submitting, you can update the auto generated CV by clicking the Refresh Report button.

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

Last Updated 12/19/2022
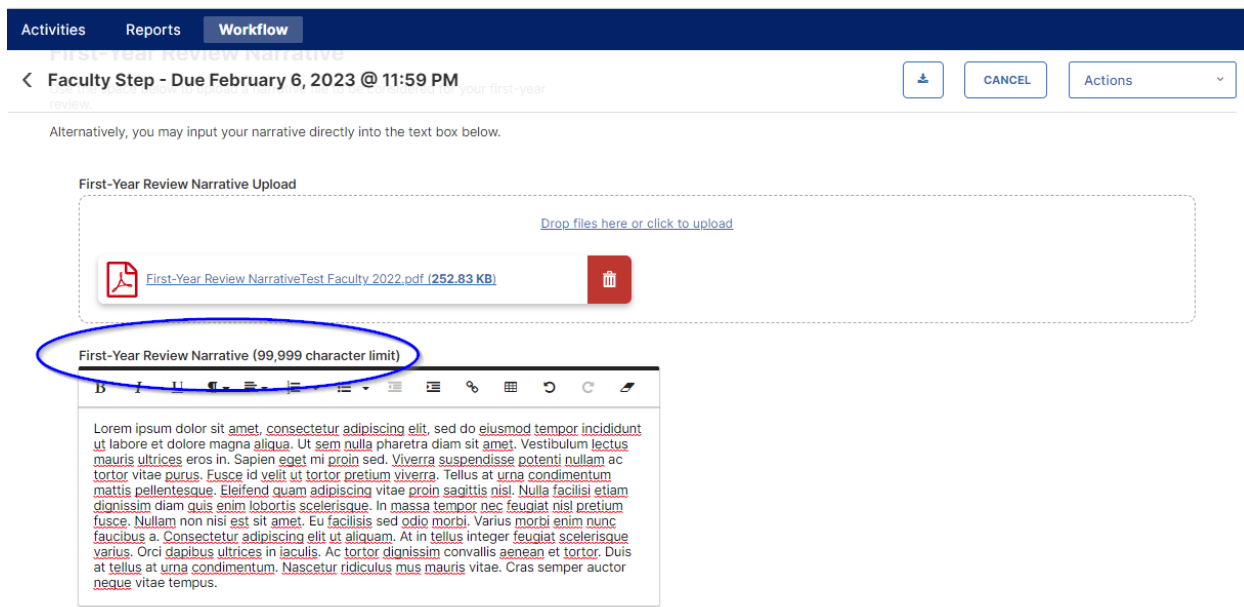
7. The next section of the Faculty Step is the First-Year Annual Review Portfolio Documents area. This section provides two options for uploading supporting documents for the faculty's portfolio:

- Document Upload by Category, **OR**
- Document Upload by Academic Year

Per your college instructions, upload your documentation using **only one** of the following methods.

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

If you wish to provide files appearing in folders and subfolders, you are encouraged to save these files and structure them using a Zip file. To create a Zip file containing the desired folder structure, you may right-click (on a PC) on the top-level folder and select Send to -> Compressed (zipped) folder. The resulting zip file will be named as the top-level folder.zip. On a Mac, you will Control-click on the top-level folder and then choose Compress from the shortcut menu. The resulting zip file will be named Archive.zip (which can, and should, be renamed.)

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

< Faculty Step - Due February 6, 2023 @ 11:59 PM                          [⬇]   [CANCEL]   [Actions ⌄]
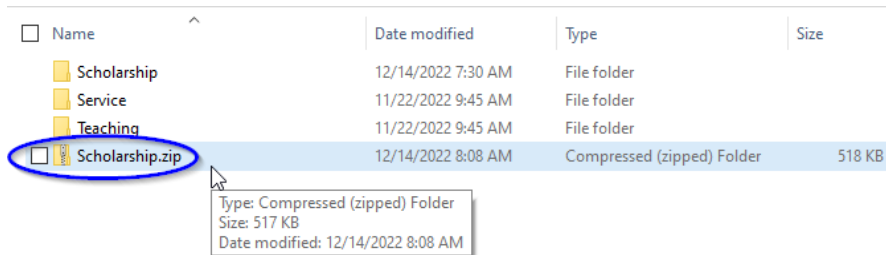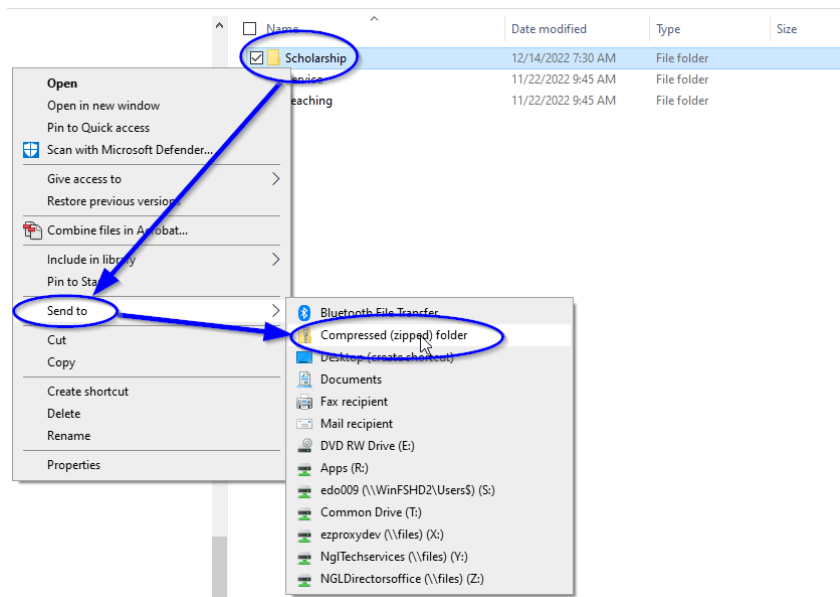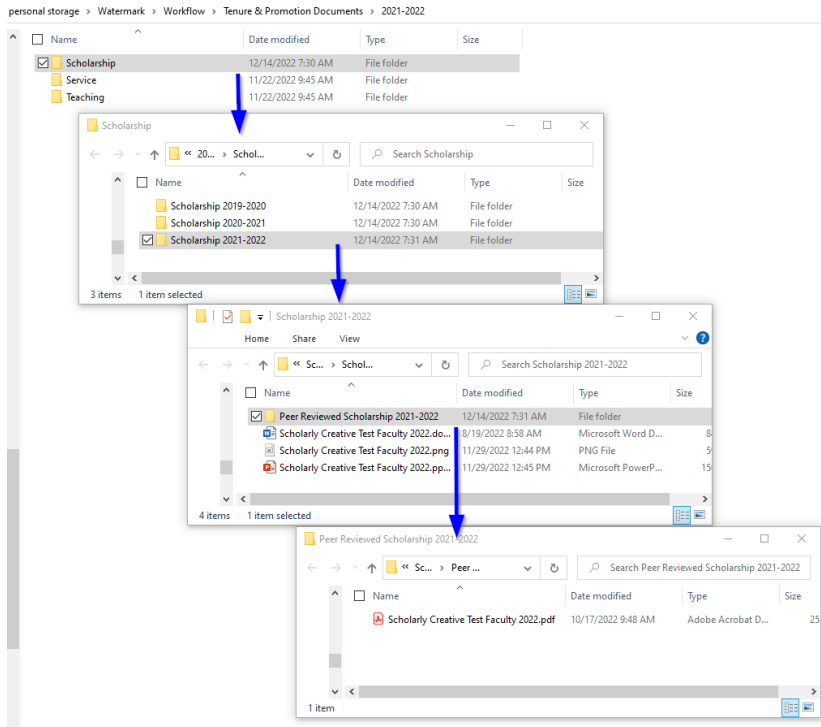
## First-Year Review Portfolio Documents

Use the space below to upload documents to be considered for your first-year review.

Per your college instructions, upload your documentation using **only one** of the following methods:

- Document Upload By Category, **OR**
- Document Upload By Academic Year

**Note:** Your materials will be displayed to reviewers in the order they are uploaded within each of the upload fields.

### Document Upload By Category

Upload documents for Teaching or Librarianship (To include IDEA Reports)

Drop files here or click to upload

Upload documents for Scholarly and/or Creative Accomplishments

Drop files here or click to upload

Upload documents for Service

Drop files here or click to upload

Upload any other Supporting Documents

Drop files here or click to upload

### Document Upload By Academic Year

Upload documents for Academic Year 2022-2023

Drop files here or click to upload

8. Document Uploads by either Category or Academic Year can be completed by clicking/drag and drop files in the appropriate location.

9. For faculty choosing to upload documents by Category, there will be four areas for files: Documents for Teaching or Librarianship, Documents for Scholarly/Creative Accomplishments, Documents for Service, and Other Supporting Documents.

10. For faculty choosing to upload documents by Academic Year, there will be a single area for files: Academic Year 2022-2023.



11. 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 -> Submit to Department Chair/School Director.

12. Once a faculty member has completed all of their entries and uploads for the Faculty Step, click on the Actions – Submit to Department Chair/School Director and click Yes in the following popup window.
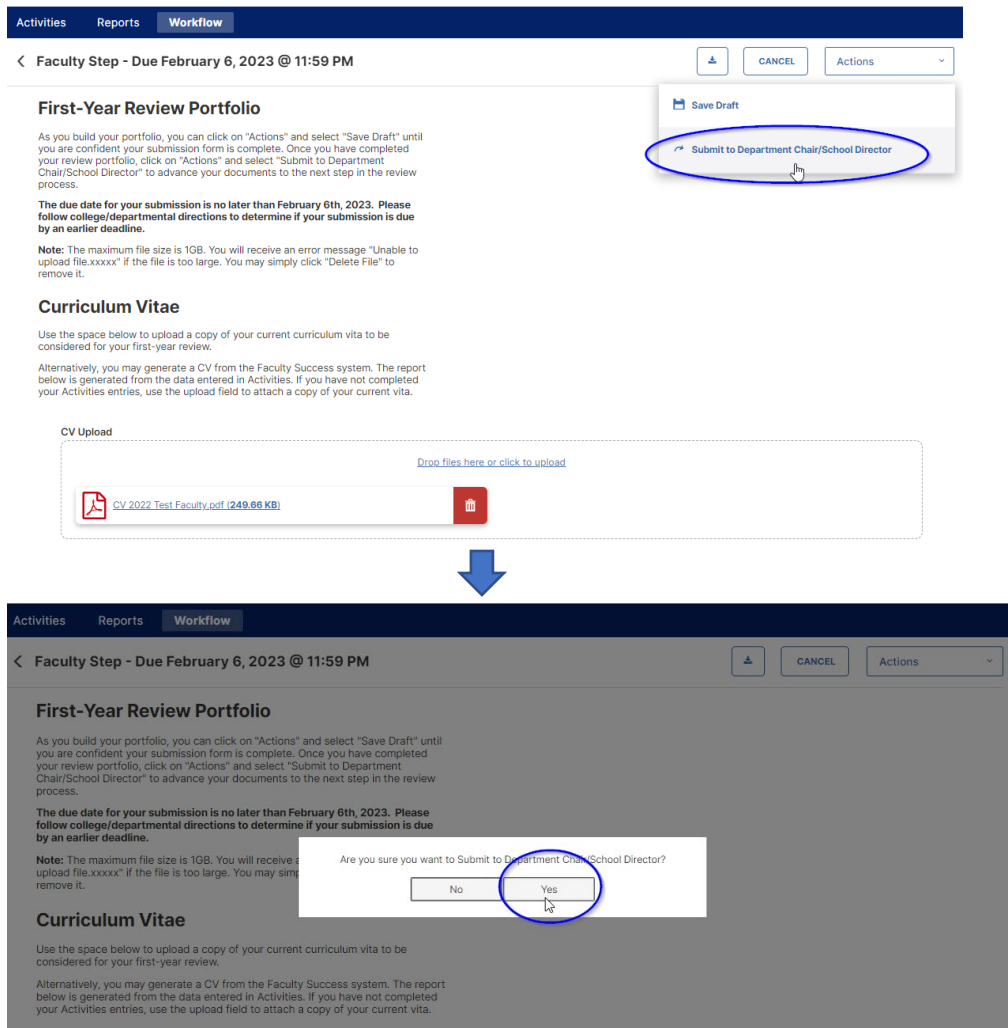


13. The Faculty Workflow Tasks screen will now show the item has moved from the Inbox to History. This screen also shows at what step of the process the submission currently resides. The Due Date shows when the next step must be completed. The Actions down arrow allows the faculty member to Recall or 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. Please do not Recall submissions after the due date (while this option may still appear, it should not be used).

## Department Chair/School Director Step

1. Beginning in the Workflow Tasks Inbox, click on the First-Year Annual Review entries.



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

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



4. Once feedback is completed, the Department Chair/School Director can select from the Actions drop-down menu the Submit option and click Yes on the following popup box. This will complete the First-Year Annual Review process for this probationary faculty member.

‹ **Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM**    ⬇    CANCEL    Actions ▾

› **Faculty Step - Test Faculty**    Submitted December 19, 2022
by Test Faculty

## Department Chair/School Director First-Year
## Review Feedback

The contents of this form constitute the Department
for faculty members during their first-year annual rev

**Please use the space below to upload the Department
Chair/School Director's feedback to the faculty member.**

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

Once you have completed the required fields below, click on "Actions" and select
"Submit" to complete the review process.

**Department Chair/School Director feedback**

Are you sure you want to Submit?
This action cannot be undone

No        Yes

Drop files here or click to upload

📄 Dept Chair Feedback Test Faculty 2022.pdf **(252.83 KB)**    🗑

Last Updated 12/19/2022