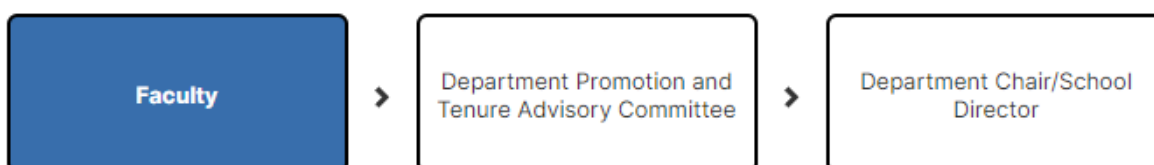


SHSU Watermark Workflow

Annual Review – Probationary Faculty 2nd, 4th, and 5th Year Help Guide

Watermark Workflow for Annual Reviews of probationary faculty in the 2nd, 4th, and 5th years 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: Probationary Annual Review (2nd, 4th, and 5th Year) - 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 Promotion and Tenure Advisory Committee review.

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

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/6d495f48-f639-4f50-82d3-f33fef9780a0/step/9bfe3a16-3761-41f4-a705-18af6bb77dbf/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2390354>

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

Dear Member DPTAC,

The following submission is now ready for your review:

Process: Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Saturday, April 15, 2023 11:59 PM CDT

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

In accordance with [APS 900417](#), the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. Please reference the [training resources](#) 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 DPTAC Chair for both the candidate and department chair/school director's review. The due date for your submission is **no later than April 15th, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

[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/6d495f48-f639-4f50-82d3-f33fef9780a0/step/864014eb-6cb1-44dd-8b75-e27082641764/assignee/2388404?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2388404>

Dear Chair DPTAC,

The following submission is now ready for your review:

Process: Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Saturday, April 15, 2023 11:59 PM CDT

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

In accordance with [APS 900417](#), the Department Promotion and Tenure Advisory Committee (DPTAC) shall review the performance of probationary faculty members beginning with the second year of employment. Please reference the [training resources](#) 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 DPTAC Chair for both the candidate and department chair/school director's review. The due date for your submission is **no later than April 15th, 2023**. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

[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/6d495f48-f639-4f50-82d3-f33fef9780a0/step/864014eb-6cb1-44dd-8b75-e27082641764/assignee/2388403?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2388403>

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

Dear Department Chair,

The following submission is now ready for your review:

Process: Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)
Candidate: Test Faculty
Due Date: Monday, May 1, 2023 11:59 PM CDT

In accordance with [APS 90041Z](#), 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](#)

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

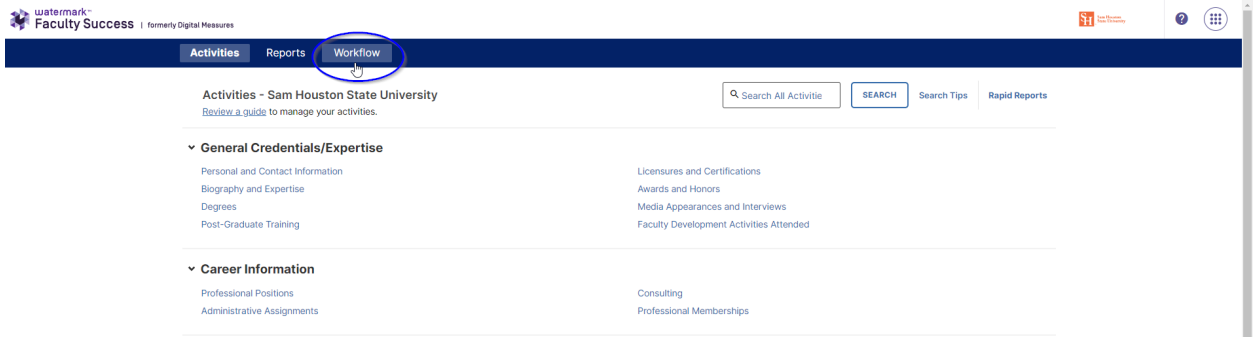
<https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/6d495f48-f639-4f50-82d3-f33fef9780a0/step/8742f851-a7cf-44b4-90c9-1931a80cb9e9/assignee/2354062?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2354062>

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

[Logging into Watermark Faculty Success](#)

1. Go to [Watermark Faculty Success](#) (<https://login.watermarkinsights.com/connect/samhoustonstateuniversity>)
2. NOTE: You may receive a two-factor authentication (DuoSecurity) prompt to connect via campus Single Sign-On (SSO).

3. Click the Workflow link in the navigation bar.

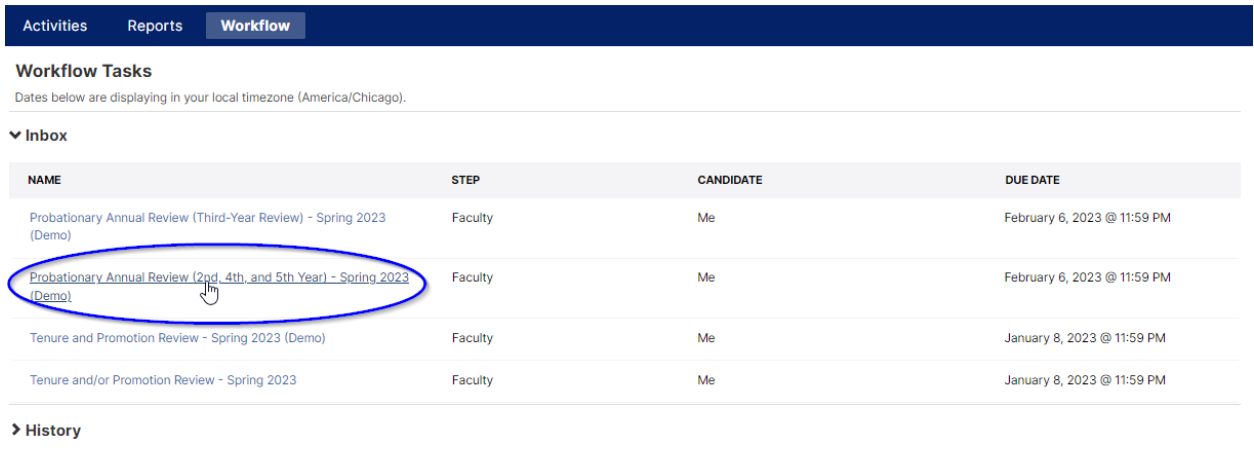


4. Select an item from Workflow Task Inbox to enter your step in the process.

Watermark Workflow 2nd, 4th, and 5th Year Annual Review Process Steps

Faculty Step

1. Click on Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 Review to begin entering your portfolio.



2. Annual 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.

Annual Review Portfolio

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

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 annual 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.

CV Upload

[Drop files here or click to upload](#)

Vita



Last Updated
December 19, 2022 at 10:19 AM

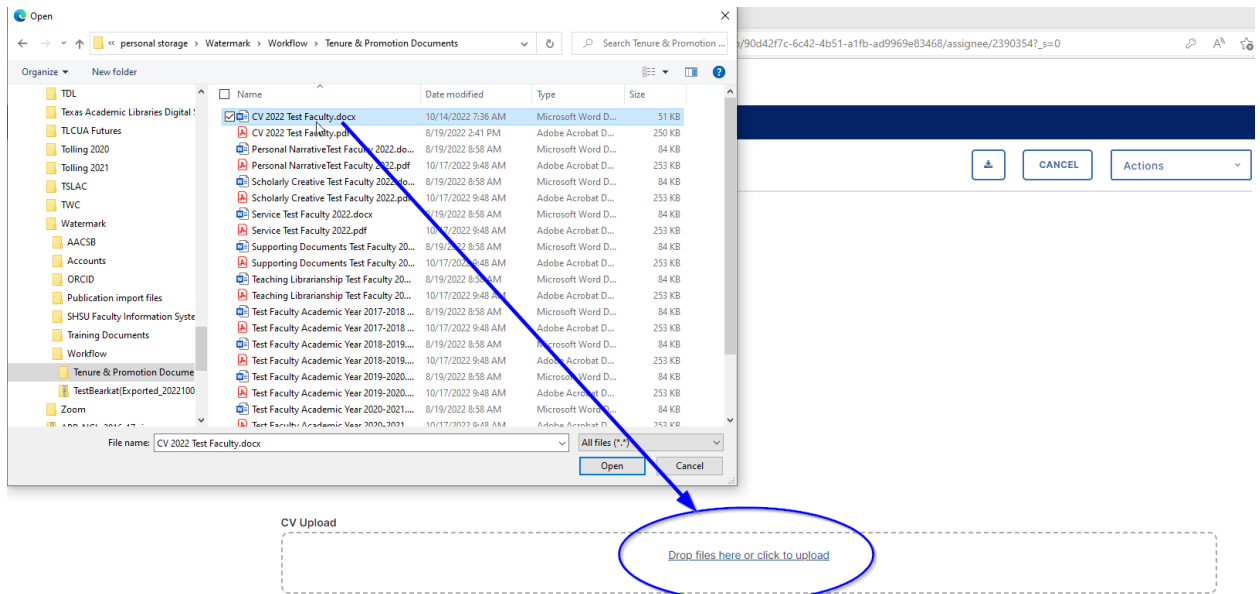
REFRESH REPORT

Annual Review Narrative

Use the space below to upload a narrative file to be considered for your annual review.

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

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



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

Annual Review Portfolio

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

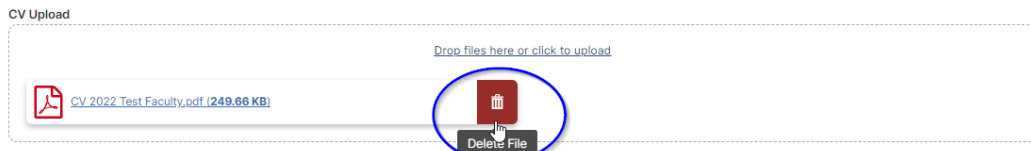
The due date for your submission is no later than February 6th, 2023. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.

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 annual 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.

Annual Review Portfolio

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

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 annual 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.

CV Upload

Drop files here or click to upload

CV 2022 Test Faculty.pdf (249.66 KB)

Refresh Report

Last Updated December 19, 2022 at 10:19 AM

- The next section of the Annual Review Portfolio is a section for including an Annual 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.

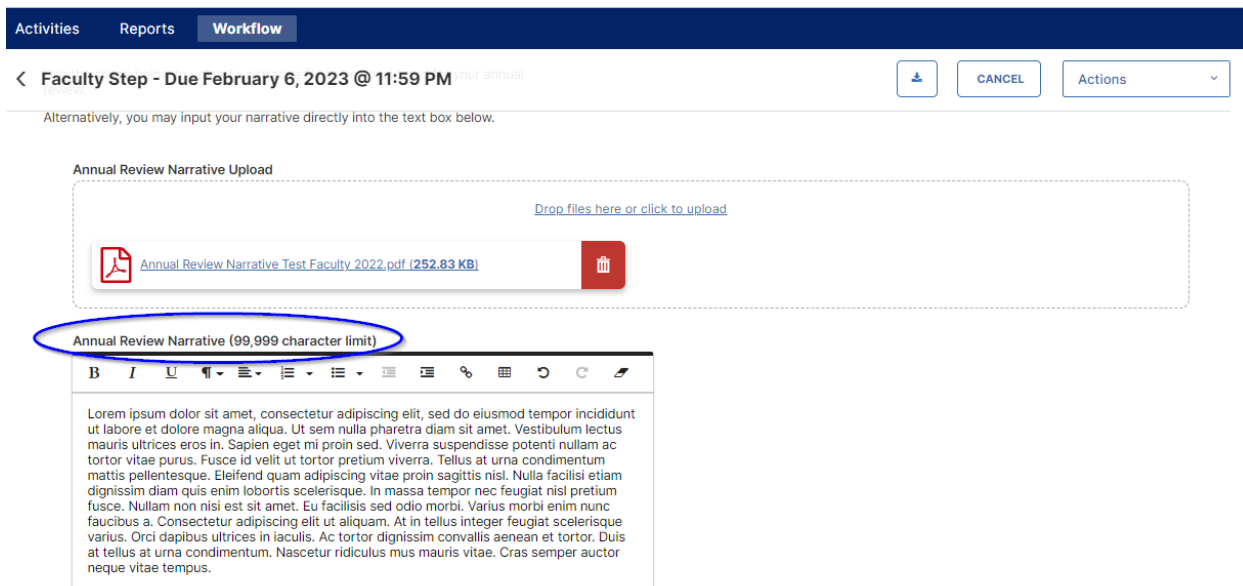
Annual Review Narrative

Use the space below to upload a narrative file to be considered for your annual review.

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

Annual Review Narrative Upload

Annual Review Narrative (99,999 character limit)



7. The next section of the Faculty Step is the Annual Review Portfolio Documents area. This section provides two options for uploading supporting documents for the faculty’s portfolio:

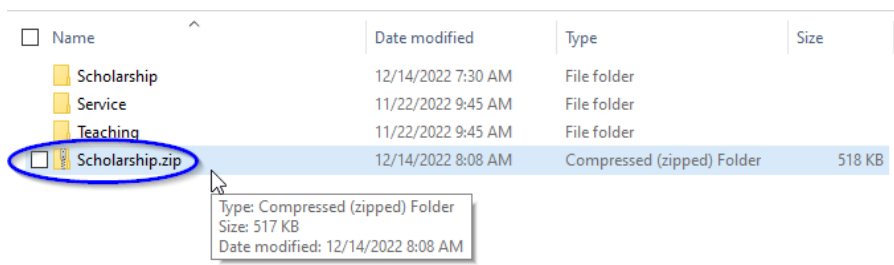
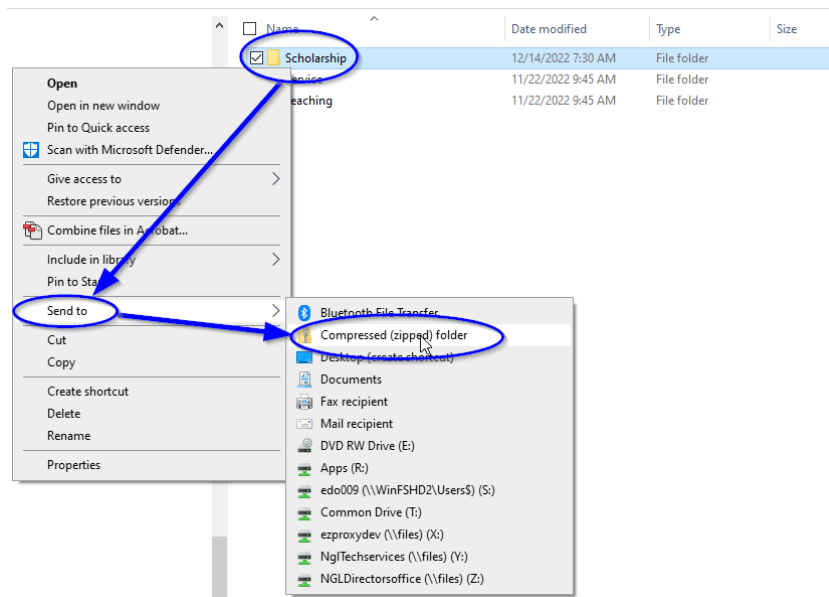
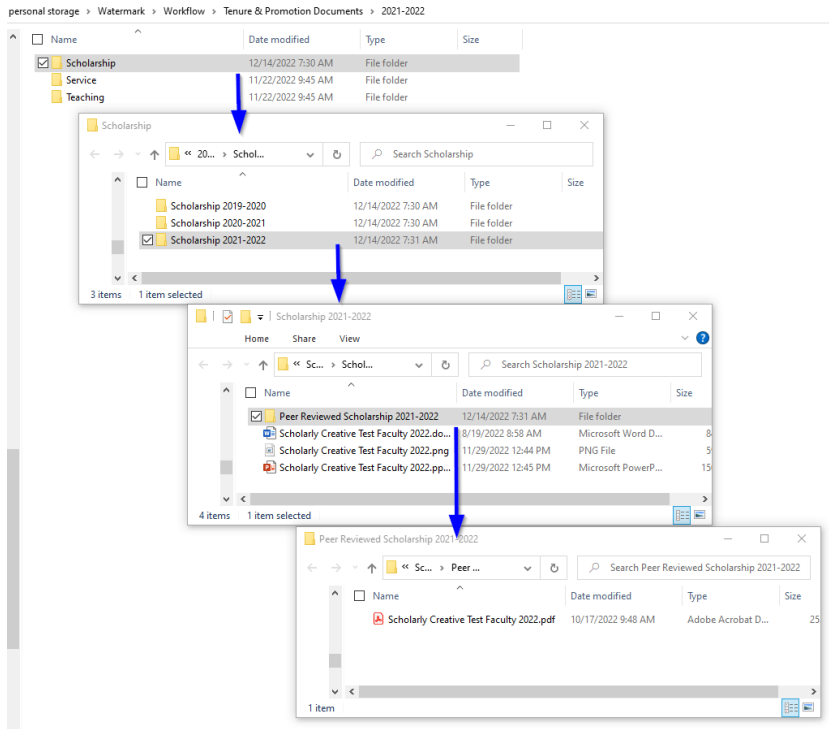
- Document Upload by Category, **OR**
- Document Upload by Academic Year

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.



Annual Review Portfolio Documents

Use the space below to upload documents to be considered for your annual 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](#)

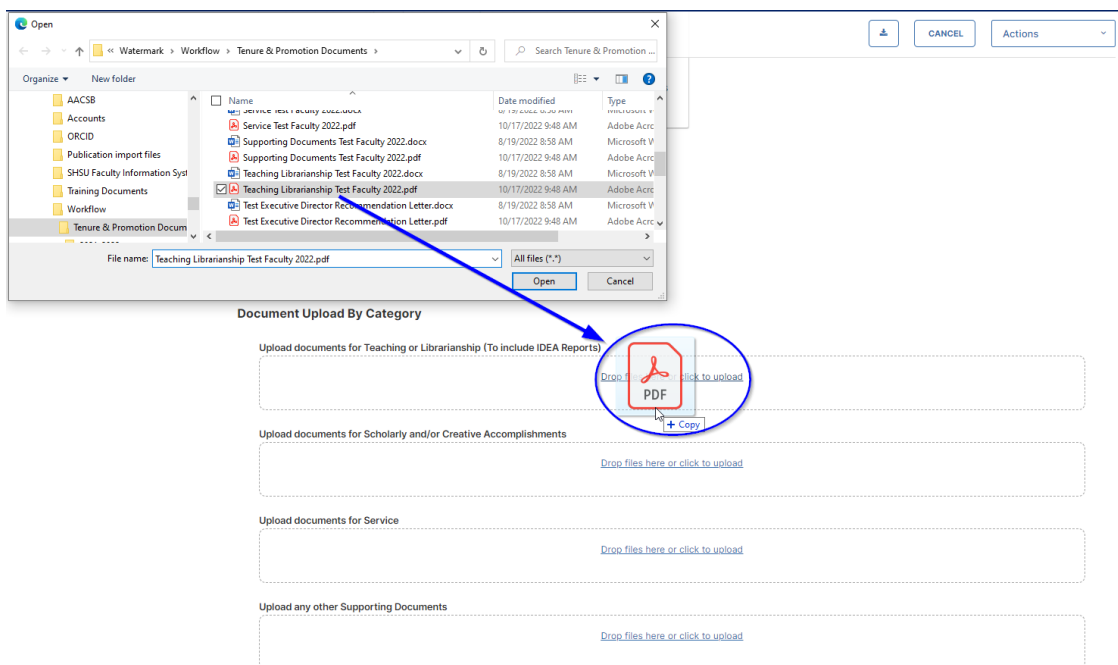
Document Upload By Academic Year

Faculty members submitting documents by Academic Year only need to upload those years pertaining to their current review (2nd, 4th, 5th) which can vary depending upon service credit or tolloed years.

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 & 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.

The screenshot shows a web interface for document uploads. At the top, there are tabs for 'Activities', 'Reports', and 'Workflow'. Below the tabs, the page title is 'Faculty Step - Due February 6, 2023 @ 11:59 PM'. There are buttons for 'CANCEL' and 'Actions'. The main content area is titled 'Document Upload By Category' and is divided into four sections:

- Upload documents for Teaching or Librarianship (To include IDEA Reports)**: This section contains two files: 'Teaching Librarianship Test Faculty 2022.pdf (252.83 KB)' and 'Teaching Librarianship Test Faculty 2022.docx (83.61 KB)'. Each file has a red delete icon.
- Upload documents for Scholarly and/or Creative Accomplishments**: This section contains five files: 'Scholarship.zip (517.31 KB)', 'Scholarly Creative Test Faculty 2022.docx (83.61 KB)', 'Scholarly Creative Test Faculty 2022.png (58.99 KB)', 'Scholarly Creative Test Faculty 2022.pptx (149.21 KB)', and 'Scholarly Creative Test Faculty 2022.docx (83.61 KB)'. Each file has a red delete icon.
- Upload documents for Service**: This section contains two files: 'Service Test Faculty 2022.docx (83.61 KB)' and 'Service Test Faculty 2022.pdf (252.83 KB)'. Each file has a red delete icon.
- Upload any other Supporting Documents**: This section contains two files: 'Supporting Documents Test Faculty 2022.docx (83.61 KB)' and 'Supporting Documents Test Faculty 2022.pdf (252.83 KB)'. Each file has a red delete icon.

10. For faculty choosing to upload documents by Academic Year, there will be five areas for files: Academic Year 2022-2023, Academic Year 2021-2022, Academic Year 2020-2021, Academic Year 2019-2020, Academic Year 2018-2019 (and older). Faculty should only upload documents that pertain to their current review (2nd, 4th, or 5th) which can vary depending upon service credit or tolled years.

Activities Reports **Workflow**

< Faculty Step - Due February 6, 2023 @ 11:59 PM 📄 CANCEL Actions

Document Upload By Academic Year

Faculty members submitting documents by Academic Year only need to upload those years pertaining to their current review (2nd, 4th, 5th) which can vary depending upon service credit or tolled years.

Upload documents for Academic Year 2022-2023

[Drop files here or click to upload](#)

- Test Faculty Academic Year 2022-2023.pdf (252.83 KB) 🗑️
- Scholarship 2022-2023.zip (516.77 KB) 🗑️
- Service Test Faculty 2022.pdf (252.83 KB) 🗑️
- Teaching Librarianship Test Faculty 2022.pdf (252.83 KB) 🗑️

Upload documents for Academic Year 2021-2022

[Drop files here or click to upload](#)

- Scholarship 2021-2022.zip (516.77 KB) 🗑️

Upload documents for Academic Year 2020-2021

[Drop files here or click to upload](#)

- Test Faculty Academic Year 2020-2021.pdf (252.83 KB) 🗑️
- Test Faculty Academic Year 2020-2021.docx (83.61 KB) 🗑️

Upload documents for Academic Year 2019-2020

[Drop files here or click to upload](#)

- Test Faculty Academic Year 2019-2020.pdf (252.83 KB) 🗑️

Upload documents for Academic Year 2018-2019 (and older)

[Drop files here or click to upload](#)

- Test Faculty Academic Year 2018-2019.docx (83.61 KB) 🗑️

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 to Start Portfolio Evaluation.

Activities Reports **Workflow**

< Faculty Step - Due February 6, 2023 @ 11:59 PM 📄 CANCEL Actions

Annual Review Portfolio

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

The due date for your submission is no later than February 6th, 2023. Please follow college/departamental 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 annual review.

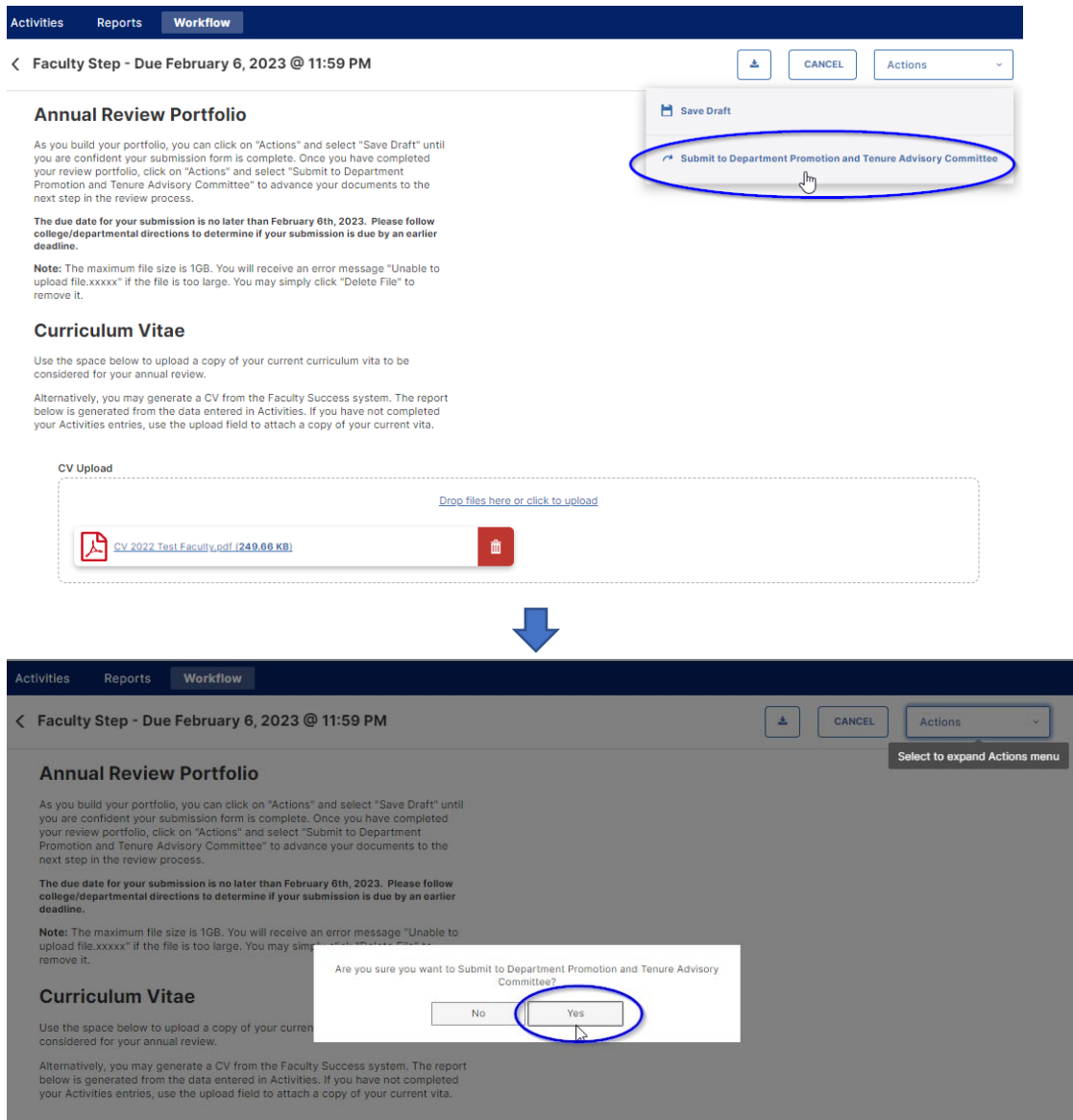
Alternatively, you may generate a CV from the Faculty Success system. The report below is generated from the data entered in Activities. If you have not completed your Activities entries, use the upload field to attach a copy of your current vita.

CV Upload

📄 **Save Draft**

➡️ Submit to Department Promotion and Tenure Advisory Committee

12. Once a faculty member has completed all of their 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.



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. 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

Dates below are displaying in your local timezone (America/Chicago).

> Inbox

▼ History

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
Probationary Annual Review (First-Year Review) - Spring 2023 (Demo)	Department Chair/School Director	Me	May 1, 2023 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Chair/School Director	Me	February 5, 2023 @ 11:59 PM	▼
Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)	Department Promotion and Tenure Advisory Committee	Me	April 15, 2023 @ 11:59 PM	▼
Tenure and Promotion Review - Spring 2023 (CAAD Demo)	Department Promotion and Tenure Advisory Committee	Me	January 29, 2023 @ 11:59 PM	▼

Recall
 Download

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

Department Promotion and Tenure Advisory Committee Member/Chair Step

1. Beginning in the Workflow Tasks Inbox click on the Tenure and/or Promotion Review entries.

Activities Reports **Workflow**

Workflow Tasks

Dates below are displaying in your local timezone (America/Chicago).

> Inbox

NAME	STEP	CANDIDATE	DUE DATE
Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)	Department Promotion and Tenure Advisory Committee	Test Faculty	April 15, 2023 @ 11:59 PM

> History

2. For both DPTAC members and the DPTAC chair – the first section of this step will contain the Faculty’s Annual Review Portfolio, with all entries and links to uploaded files.

Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM Download CANCEL Actions

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

Annual Review Portfolio

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

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 annual 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.

CV Upload

 CV 2022 Test Faculty.pdf (249.66 KB)

- The next area of the screen will differ for DPTAC members vs DPTAC chair. DPTAC members will see a single Text Box asking them to type their name after they have reviewed the faculty portfolio and then select the Actions -> Publish their Response to Chair and click Yes in the pop-up window to complete their portion of the process.

Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM Download CANCEL Actions

> Faculty Step - Test Faculty

My Response

Please acknowledge your review of the faculty member's submission for annual evaluation is complete by typing your name below. Then, click on "Actions" and select "Publish My Response to Chair" to finish the process.

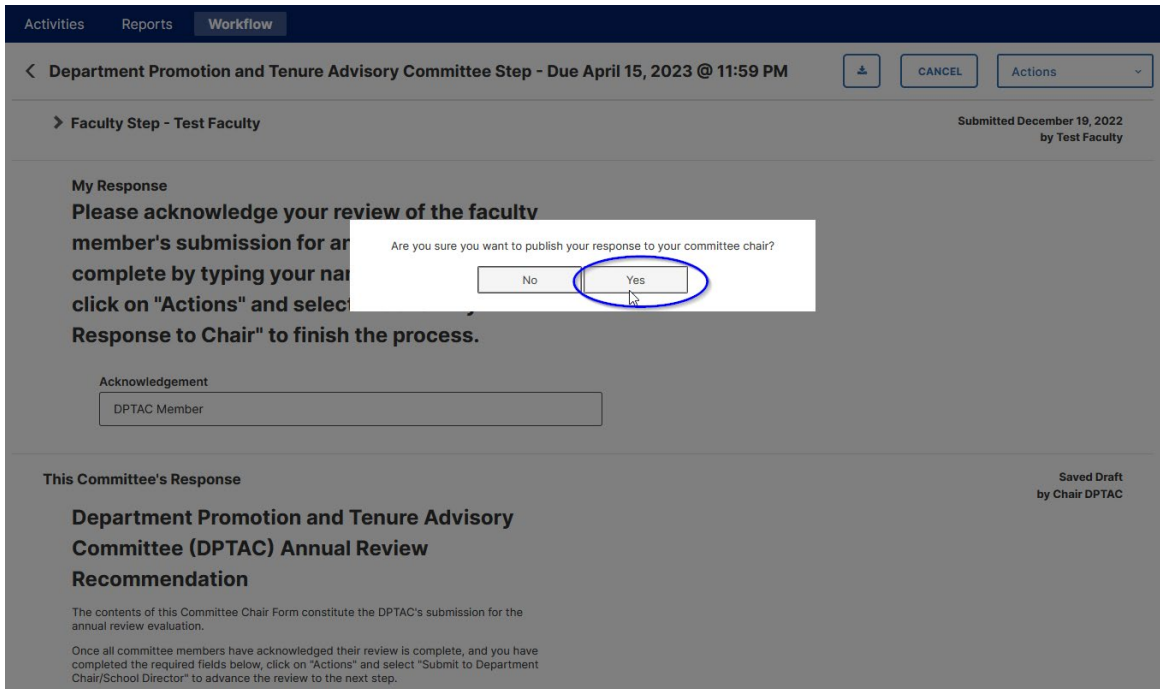
Acknowledgement

DPTAC Member

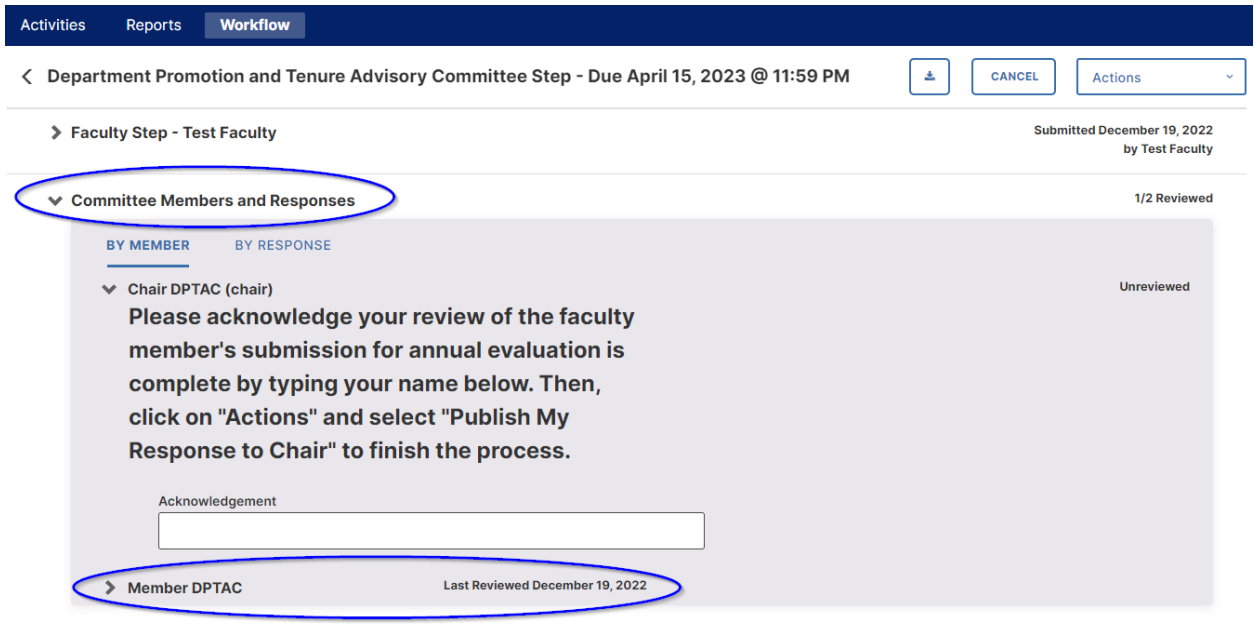
Save Draft

Publish My Response to Chair





4. For the DPTAC Chair, after the Annual Review Portfolio section you will see a Committee Members and Responses section. This will include 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 and published their Acknowledgement Response.



Activities Reports **Workflow**

> Faculty Step - Test Faculty

< Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM

Committee Members and Responses 1/2 Reviewed

BY MEMBER BY RESPONSE

▼ Chair DPTAC (chair) Unreviewed

Please acknowledge your review of the faculty member's submission for annual evaluation is complete by typing your name below. Then, click on "Actions" and select "Publish My Response to Chair" to finish the process.

Acknowledgement

▼ Member DPTAC Last Reviewed December 19, 2022

Please acknowledge your review of the faculty member's submission for annual evaluation is complete by typing your name below. Then, click on "Actions" and select "Publish My Response to Chair" to finish the process.

Acknowledgement

DPTAC Member

- The remaining section of the DPTAC chair screen contains the DPTAC's written summary that will be submitted as a file upload to the Department Chair/School Director.

Activities Reports **Workflow**

< Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM

Member DPTAC Last Reviewed December 19, 2022

This Committee's Response

Department Promotion and Tenure Advisory Committee (DPTAC) Annual Review Recommendation

The contents of this Committee Chair Form constitute the DPTAC's submission for the annual 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 15th, 2023. Please follow college/departamental directions to determine if the DPTAC submission is due by an earlier deadline.

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 file or click to upload

+ Copy

Open

Watermark Workflow Tenure & Promotion Documents

Name	Date modified	Type
Dept Chair Recommendation Letter Test Faculty 2022.pdf	10/17/2022 9:48 AM	Adobe Acrc
DPTAC Recommendation Letter Test Faculty 2022.docx	8/19/2022 8:58 AM	Microsoft V
DPTAC Recommendation Letter Test Faculty 2022.pdf	10/17/2022 9:48 AM	Adobe Acrc
DPTAC Written Summary Test Faculty Annual Review 2022.d...	8/19/2022 8:58 AM	Microsoft V
First-Year Review Narrative Test Faculty 2022.pdf	10/17/2022 9:48 AM	Adobe Acrc
Personal Narrative Test Faculty 2022.docx	8/19/2022 8:58 AM	Microsoft V
Personal Narrative Test Faculty 2022.pdf	10/17/2022 9:48 AM	Adobe Acrc

File name: DPTAC Written Summary Test Faculty Annual Review 2022.docx

6. 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 Member to review the Committee's Response prior to submission.

The screenshot shows the 'Workflow' tab of a system interface. At the top, there are tabs for 'Activities', 'Reports', and 'Workflow'. Below this is a header for 'Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM'. There are buttons for 'CANCEL' and 'Actions'. A dropdown menu is open under 'Actions', with 'Save Draft' highlighted by a blue circle. Other options in the menu include 'Submit to Department Chair/School Director' and 'Send Back to Previous Step'. Below the header, there is a form for 'Acknowledgement' and a section for 'This Committee's Response' titled 'Department Promotion and Tenure Advisory Committee (DPTAC) Annual Review Recommendation'. The response section contains instructions and a file upload area. The file upload area shows a file named 'DPTAC Written Summary Test Faculty Annual Review 2022.docx (83.61 KB)' with a red trash icon next to it.

7. DPTAC members can click on the Workflow Tasks Inbox item to see any drafts saved by the DPTAC chair to access the DPTAC Written Summary uploaded file.

The screenshot shows the same 'Workflow' tab interface as above. The 'Actions' dropdown menu is not open. In the 'DPTAC written summary' upload area, the file 'DPTAC Written Summary Test Faculty Annual Review 2022.docx (83.61 KB)' is highlighted with a blue circle. In the top right corner of the response section, there is a status indicator that says 'Saved Draft by Chair DPTAC'. The rest of the interface, including the header and instructions, is identical to the previous screenshot.

8. Once the DPTAC has conferred and feel the committee's written summary 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.

The screenshot shows the 'Workflow' tab of a system interface. The main heading is 'Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM'. Below this, there is a breadcrumb 'Member DPTAC' and a status 'Last Reviewed December 19, 2022'. The main content area is titled 'This Committee's Response' and 'Department Promotion and Tenure Advisory Committee (DPTAC) Annual Review Recommendation'. It contains several paragraphs of text, including a note about the due date (April 15th, 2023) and a note about the DPTAC Chair's role. Below the text is a section for uploading the 'DPTAC written summary', which contains a file named 'DPTAC Written Summary Test Faculty Annual Review 2022.docx (83.61 KB)'. On the right side, an 'Actions' dropdown menu is open, showing three options: 'Save Draft', 'Submit to Department Chair/School Director' (which is circled in blue), and 'Send Back to Previous Step'.

This screenshot is identical to the one above, but with a confirmation dialog box overlaid in the center. The dialog box asks 'Are you sure you want to Submit to Department Chair/School Director?' and has two buttons: 'No' and 'Yes'. The 'Yes' button is circled in blue, indicating it is the intended action.

9. The option currently exists for participants in later steps of the Workflow process to Send Back to Previous Step from the Actions drop down menu. Confer with your department chair/school director prior to using this option as it can impact a submission due date.

The top screenshot shows a workflow interface with a dark blue header containing 'Activities', 'Reports', and 'Workflow'. Below the header, there is a breadcrumb trail: '< Department Promotion and Tenure Advisory Committee Step - Due April 15, 2023 @ 11:59 PM'. To the right of the breadcrumb are three buttons: a download icon, 'CANCEL', and 'Actions' with a dropdown arrow. The main content area shows a list of steps: 'Faculty Step - Test Faculty' and 'Committee Members and Responses'. A dropdown menu is open over the 'Committee Members and Responses' step, showing three options: 'Save Draft', 'Submit to Department Chair/School Director', and 'Send Back to Previous Step'. The 'Send Back to Previous Step' option is circled in blue. Below the dropdown, the text reads: 'This Committee's Response', 'Department Promotion and Tenure Advisory Committee (DPTAC) Annual Review Recommendation', and 'The content of this Committee Chair Form constitutes the DPTAC's submission for the...'. The bottom screenshot shows the same interface but with a dialog box titled 'Send Back to Previous Step' open. The dialog box has a close button (X) in the top right corner. It contains three fields: 'Subject' (a text input field), 'Message' (a rich text editor with a toolbar and a character count of 0/3800), and 'Due Date' (a date picker showing 'mm/dd/yyyy'). Below the date picker is the text 'Due date selection is displaying in US/Central.' At the bottom of the dialog box are two buttons: 'Cancel' and 'Send Back'. Below the dialog box, there is a note: 'The due date for the DPTAC submission is no later than April 15th, 2023. Please follow college/departmental directions to determine if the DPTAC submission is due by an earlier deadline.'

10. Once the DPTAC Chair has submitted the Written Summary members and chair of the DPTAC will then see that process moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are also available in this step. Please do not Recall a submission after it has passed either the list due date, or any earlier departmental/college due dates for the DPTAC submission.

Activities Reports **Workflow**

Workflow Tasks

Dates below are displaying in your local timezone (America/Chicago).

▼ **Inbox**

NAME	STEP	CANDIDATE	DUE DATE
No Data to Display			

▼ **History**

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Chair	Bearkat Test	November 12, 2022 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Chair/School Director	Test Faculty	February 5, 2023 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023	Faculty	Michael Stephenson	January 8, 2023 @ 11:59 PM	▼
<u>Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)</u>	Department Chair/School Director	Test Faculty	May 1, 2023 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023	Faculty	Test Faculty	January 8, 2023 @ 11:59 PM	▼

Recall

Download

Department Chair/School Director Step

1. Beginning in the Workflow Tasks Inbox click on the Tenure and/or Promotion Review entries.

Activities CV Imports Manage Data Reports **Workflow** Tools

Workflow Tasks

Dates below are displaying in your local timezone (America/Chicago).

▼ **Inbox**

NAME	STEP	CANDIDATE	DUE DATE
<u>Probationary Annual Review (2nd, 4th, and 5th Year) - Spring 2023 (Demo)</u>	Department Chair/School Director	Test Faculty	May 1, 2023 @ 11:59 PM
Probationary Annual Review (First-Year Review) - Spring 2023 (Demo)	Department Chair/School Director	Test Faculty	May 1, 2023 @ 11:59 PM
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Chair/School Director	Test Faculty	February 5, 2023 @ 11:59 PM
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Chair	Bearkat Test	November 12, 2022 @ 11:59 PM

► **History**

2. In the Department Chair/School Director step the first section will contain the faculty's Annual Review Portfolio, with all entries and links to uploaded files. The second section will contain the DPTAC uploaded written summary.

▼ Faculty Step - Test Faculty

Submitted December 19, 2022
by Test Faculty

Annual Review Portfolio

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

The due date for your submission is no later than February 6th, 2023. Please follow college/departamental 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 annual 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.

CV Upload



Vita



► Faculty Step - Test Faculty

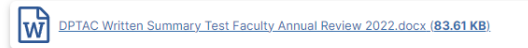
Submitted December 19, 2022
by Test Faculty

▼ Department Promotion and Tenure Advisory Committee Step - Test Faculty

Submitted December 19, 2022
by Chair DPTAC

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

DPTAC written summary



- The final section for the Department Chair/School Director step contains the required file upload containing the department chair’s annual review for the probationary faculty member.

Activities CV Imports Manage Data Reports Workflow Tools

< Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM

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

Department Promotion and Tenure Advisory Committee Step - Test Faculty

Department Chair/School Director Annual Review Recommendation

The contents of this form constitute the Department Chair/School Director's feedback for the faculty member.

Please upload the Department Chair/School Director's review in the space provided below.

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

Department Chair/School Director review*

Drop files here or click to upload

- Once the review 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, to complete the annual review of that probationary faculty member.

Activities CV Imports Manage Data Reports Workflow Tools

< Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM

Faculty Step - Test Faculty

Department Promotion and Tenure Advisory Committee Step - Test Faculty

Department Chair/School Director Annual Review Recommendation

The contents of this form constitute the Department Chair/School Director's feedback for the faculty member.

Please upload the Department Chair/School Director's review in the space provided below.

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

Department Chair/School Director review*

Drop files here or click to upload

Dept Chair annual review Test Faculty 2022.docx (83.61 KB)

Save Draft

Submit

Send Back to Previous Step

Activities CV Imports Manage Data Reports Workflow Tools

< Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM [Download] [CANCEL] [Actions]

> Faculty Step - Test Faculty Submitted December 19, 2022 by Test Faculty

> Department Promotion and Tenure Advisory Committee Step - Test Faculty Submitted December 19, 2022 by Chair DPTAC

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

No Yes

Department Chair/School Director Review Recommendation


The contents of this form constitute the Department Chair/School Director's feedback for the faculty member.

Please upload the Department Chair/School Director's review in the space provided below.

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

Department Chair/School Director review*

Drop files here or click to upload

 Dept_Chair_annual_review_Test_Faculty_2022.docx (83.61 KB) 