

# SHSU Watermark Workflow Annual Faculty Evaluation System (FES) Review Process Help Guide

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Watermark Workflow for Annual Faculty Evaluation System (FES) Review of 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:** Annual Faculty Evaluation System (FES) Review  
(Tenured/Tenure-track Faculty) (Demo)  
**Due Date:** Wednesday, March 1, 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 820317](#), 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 March 1, 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/73891fdf-2d5c-49ac-8459-70a81f95d3e1/step/0dfabf13-3d67-40a7-b195-1f2c6da6b7ae/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:** Annual Faculty Evaluation System (FES) Review  
(Tenured/Tenure-track) (DEMO)  
**Candidate:** Test Faculty  
**Due Date:** Monday, May 1, 2023 11:59 PM CDT

In accordance with [APS 820317](#), the department chair/school director shall review the performance of faculty members. Be sure to incorporate administrative release (FES X) supervisor ratings, when applicable, on their annual FES review. Please reference the [training resources](#) located on the Academic Affairs Watermark website for more information.

The [FES summary report](#) (FES 5) for each individual candidate will be uploaded into the Watermark Faculty Success system by the department chair/school director for the candidate's review. The due date for your submission is **no later than May 1, 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:*

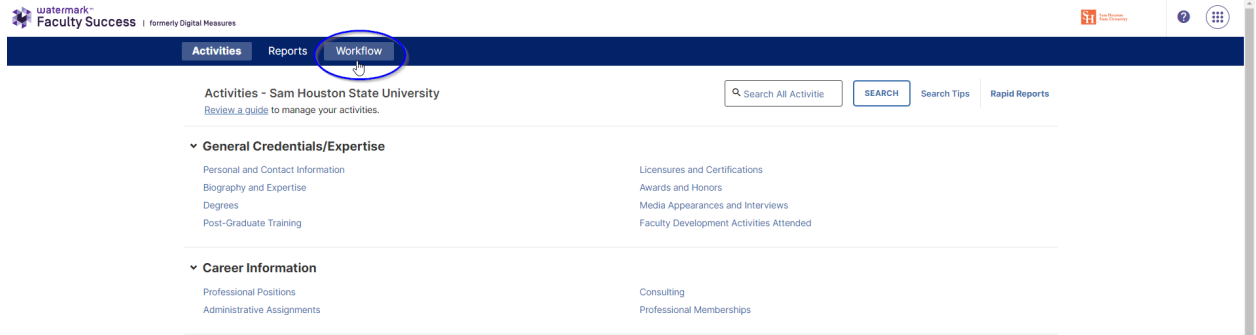
<https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/7dc13725-6da4-45f3-bc5a-0c8000e79cce/step/7e6da5eb-f35a-44d6-a4e8-1f21622adc6c/assignee/2357490?embed=workflow:assignee,workflow:subject,workflow:response&orgId=1660&personId=2357490>

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

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## Logging into Watermark Faculty Success

1. Go to [Watermark Faculty Success](https://login.watermarkinsights.com/connect/samhoustonstateuniversity) (<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.

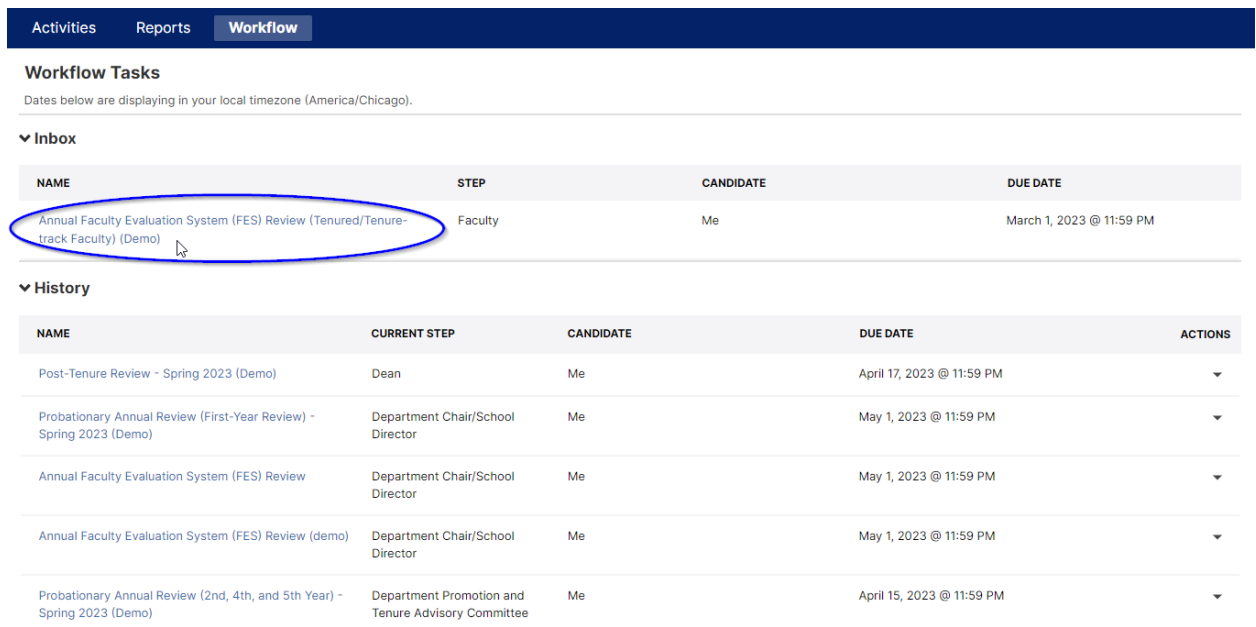


4. Select an item from Workflow Task Inbox to enter your step in the process.

## Watermark Workflow Annual Faculty Evaluation System (FES) Review Process Steps

### Faculty Step

1. Click on Annual Faculty Evaluation System (FES) Review to begin entering your portfolio.



- Annual Faculty Evaluation System (FES) Review Portfolio screen provides an area for uploading a current CV – or an automated CV can be provided based upon your activity’s entries in Watermark.

Activities Reports **Workflow**

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 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 FES 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 January 20, 2023 at 5:35 PM [REFRESH REPORT](#)

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

Activities Reports **Workflow**

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 2023. Please follow college/departmental directions to determine if your submission is due by an earlier deadline.**

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CV Upload

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

Vita

Last Updated January 20, 2023 at 5:35 PM [REFRESH REPORT](#)

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

Activities Reports Workflow

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 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 FES 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.docx (50.89 KB)

Delete File

- 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.

Activities Reports Workflow

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 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 FES 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

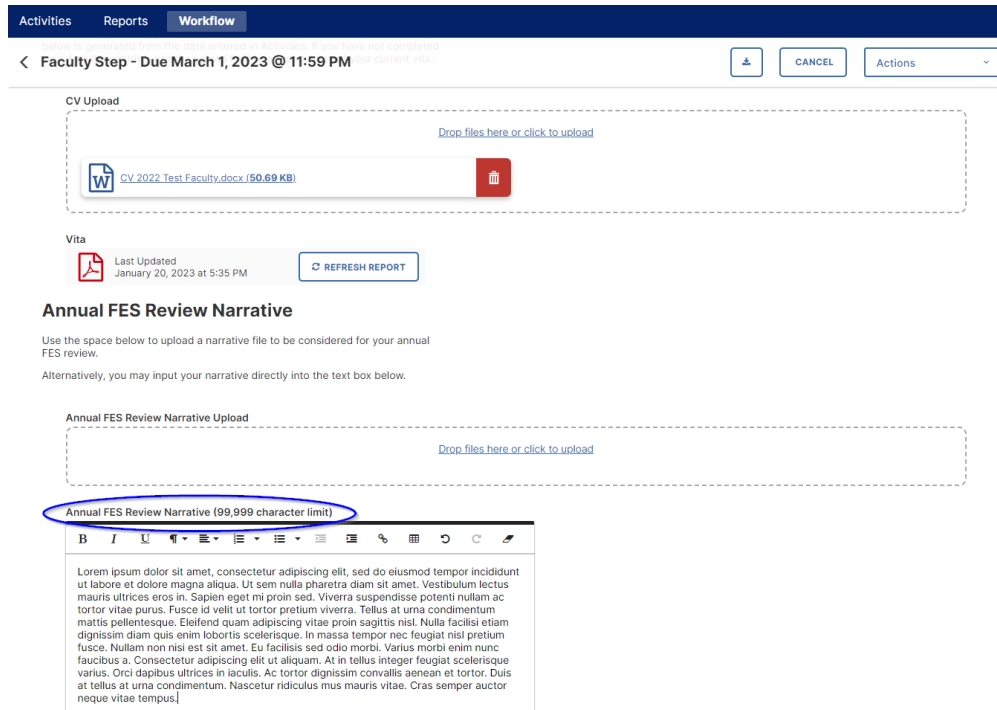
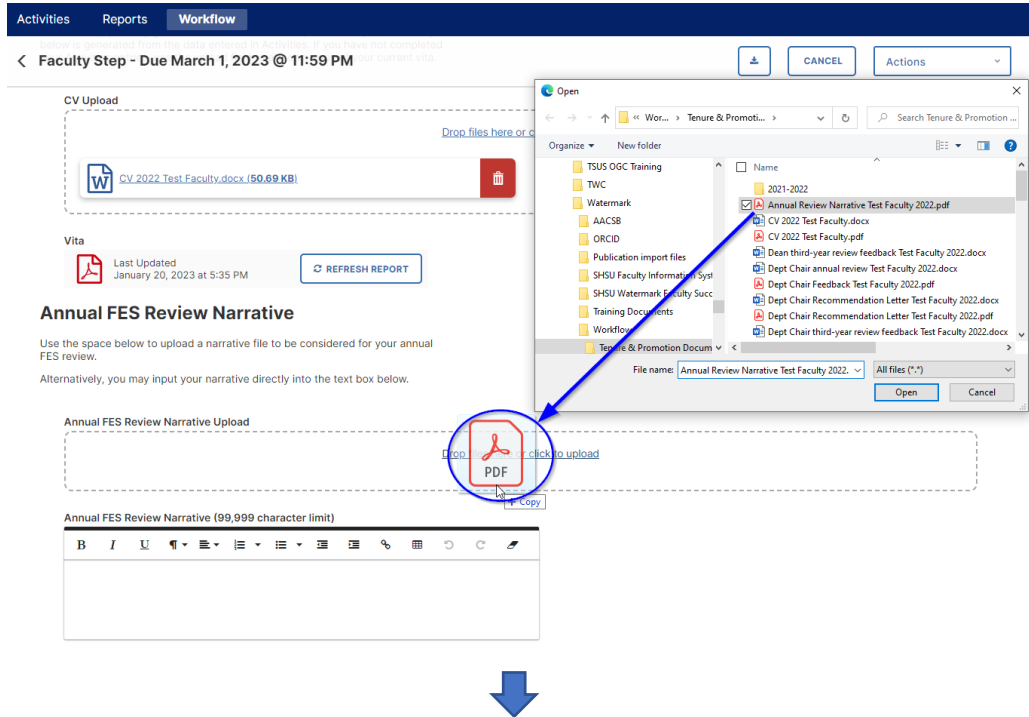
CV\_2022\_Test Faculty.docx (50.89 KB)

Vita

Last Updated January 20, 2023 at 5:35 PM

REFRESH REPORT

- The next section of the Annual Faculty Evaluation System (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 limit of just under 100,000 characters.



7. The next section of the Faculty Step is the Annual Faculty Evaluation System (FES) 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 Calendar Year

Per your [college instructions](#), upload your documentation using **only one** of the following methods.

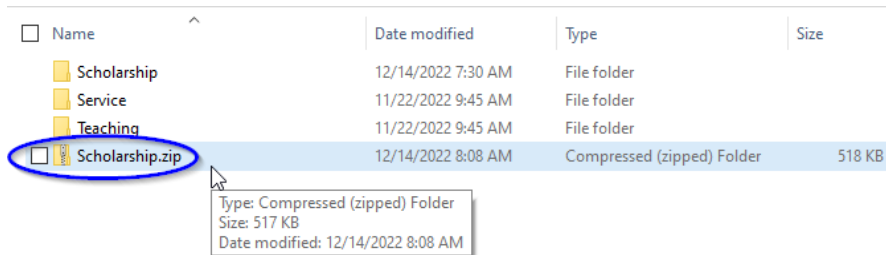
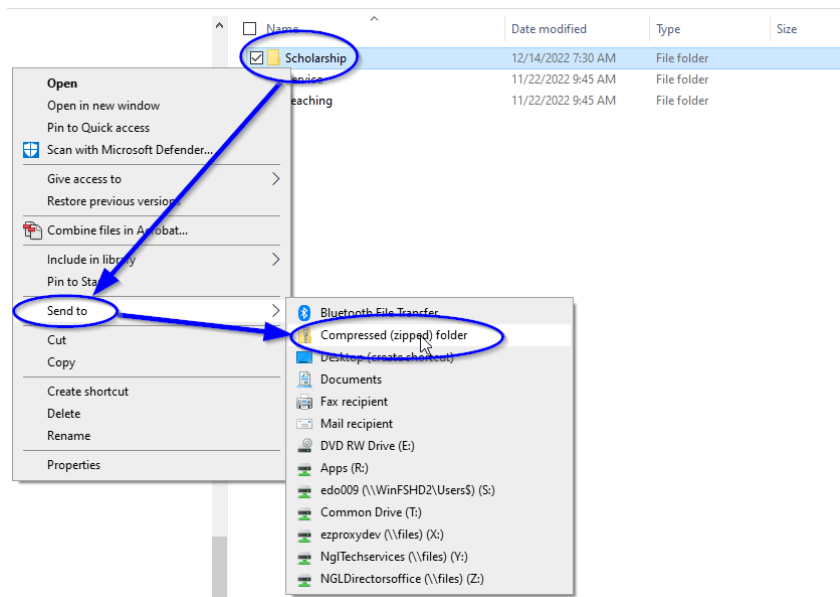
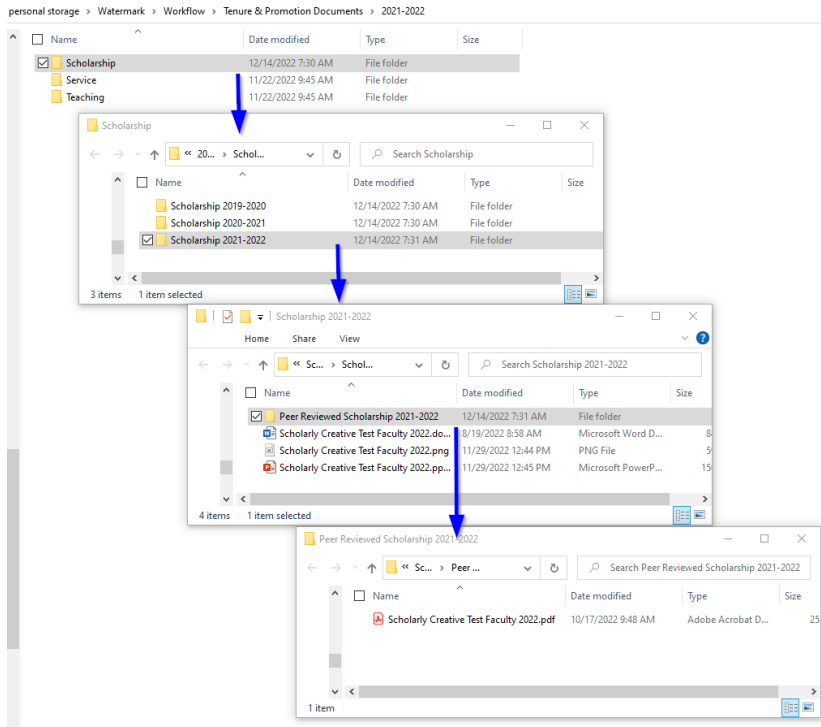
The screenshot shows a web interface for the Annual Faculty Evaluation System (FES) Review Portfolio Documents. At the top, there are tabs for 'Activities', 'Reports', and 'Workflow'. Below the tabs, the page title is 'Faculty Step - Due March 1, 2023 @ 11:59 PM'. The main heading is 'Annual Faculty Evaluation System (FES) Review Portfolio Documents'. Below the heading, there is a note: 'Use the space below to upload documents to be considered for your annual FES review. Per your college instructions, upload your documentation using only one of the following methods: • Document Upload By Category, OR • Document Upload By Calendar Year'. A note below that states: 'Note: Your materials will be displayed to reviewers in the order they are uploaded within each of the upload fields.' There are two main sections: 'Document Upload By Category' and 'Document Upload By Calendar Year'. Under 'Document Upload By Category', there are four upload fields: 'Upload documents for Teaching or Librarianship (To include IDEA Reports)', 'Upload documents for Scholarly and/or Creative Accomplishments', 'Upload documents for Service', and 'Upload any other Supporting Documents'. Each field has a 'Drop files here or click to upload' link. Under 'Document Upload By Calendar Year', there is one upload field: 'Upload documents for Calendar Year 2022', also with a 'Drop files here or click to upload' link.

**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.

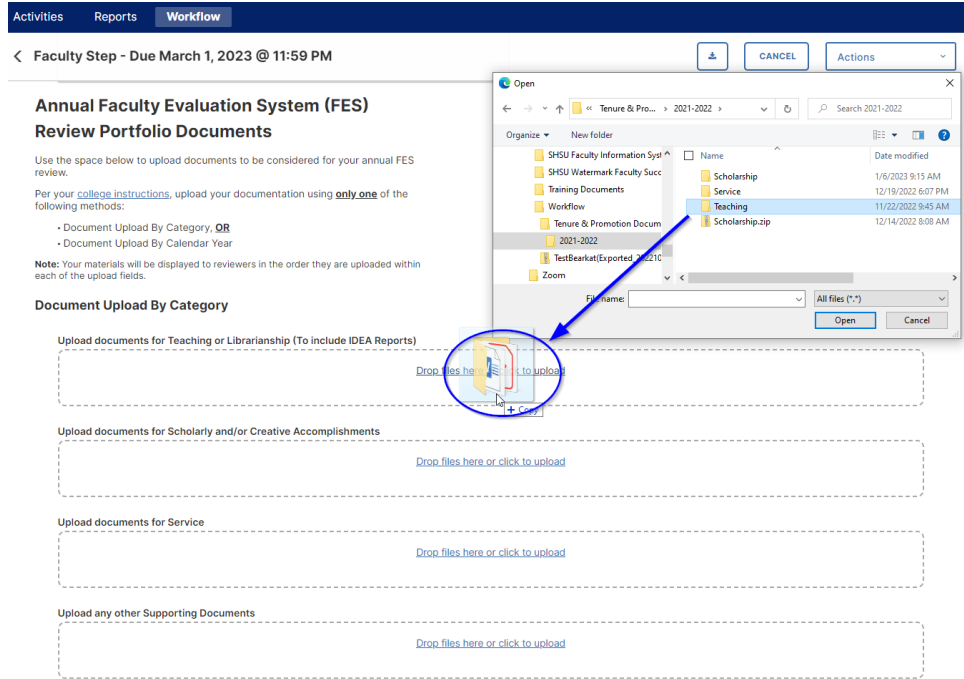
If you wish to provide files appearing in folders and subfolders, you are encouraged to save these files and structure them using a Zip file. To create a Zip file containing the desired folder structure, you may right-click (on a PC) on the top-level folder and select Send to -> Compressed (zipped) folder. 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.

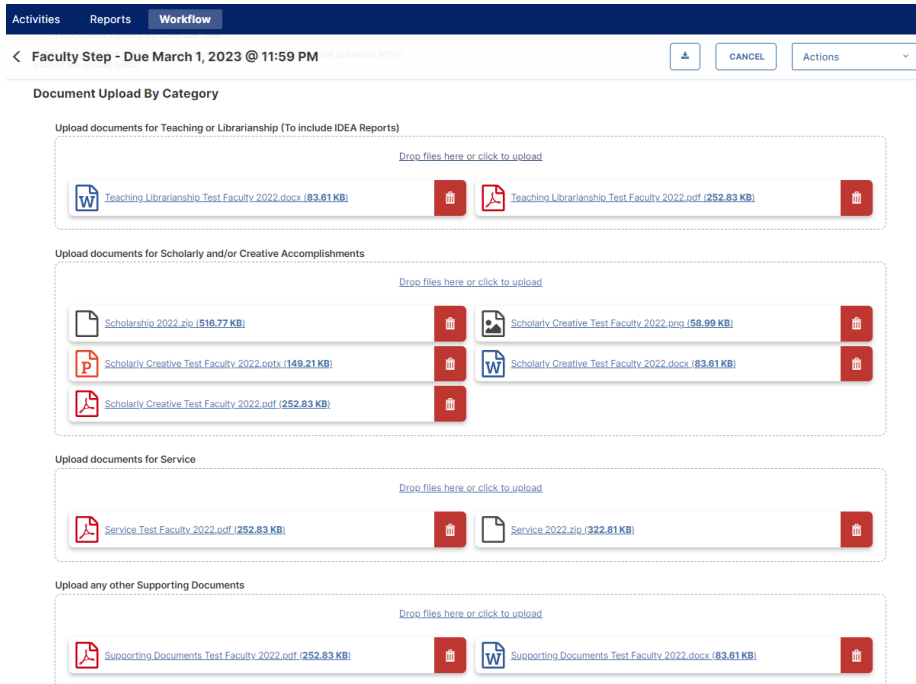




- Document Uploads by either Category or Calendar Year can be completed by clicking/drag and drop files in the appropriate location.



- 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 Calendar Year, there will be a single area for files: Calendar Year 2022.

The screenshot shows a web interface with a dark blue header containing 'Activities', 'Reports', and 'Workflow' tabs. Below the header, there is a breadcrumb trail: '< Faculty Step - Due March 1, 2023 @ 11:59 PM'. To the right of the breadcrumb are three buttons: an upload icon, 'CANCEL', and 'Actions' with a dropdown arrow. The main content area is titled 'Document Upload By Category' and contains four dashed boxes, each with a heading and a 'Drop files here or click to upload' link:

- Upload documents for Teaching or Librarianship (To include IDEA Reports)
- Upload documents for Scholarly and/or Creative Accomplishments
- Upload documents for Service
- Upload any other Supporting Documents

Below this is the 'Document Upload By Calendar Year' section, titled 'Upload documents for Calendar Year 2022'. It features a 'Drop files here or click to upload' link and a list of six uploaded files, each with a file icon, name, size, and a delete button:

- Scholarly\_Creative\_Test\_Faculty\_2022.nptx (149.21 KB)
- Scholarly\_Creative\_Test\_Faculty\_2022.png (58.99 KB)
- Scholarship\_2022.zip (516.77 KB)
- Service\_2022.zip (322.81 KB)
- Service\_Test\_Faculty\_2022.pdf (252.83 KB)
- Teaching\_Librarianship\_Test\_Faculty\_2022.pdf (252.83 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 -> Submit to Department Chair/School Director.

The screenshot shows the 'Annual Faculty Evaluation System (FES) Review Portfolio' page. The header is the same as in the previous screenshot. The breadcrumb trail is '< Faculty Step - Due March 1, 2023 @ 11:59 PM'. The 'Actions' dropdown menu is open, showing two options: 'Save Draft' (highlighted with a red circle) and 'Submit to Department Chair/School Director'. The main content area includes the following text:

**Annual Faculty Evaluation System (FES) 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 March 1st, 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 FES 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.docx (50.69 KB)

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.

Activities Reports Workflow

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 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 FES 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.docx (50.69 KB)



Activities Reports Workflow

< Faculty Step - Due March 1, 2023 @ 11:59 PM

Annual Faculty Evaluation System (FES)  
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 March 1st, 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 FES 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.

Are you sure you want to Submit to Department Chair/School Director?

No Yes

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).

Activities Reports Workflow				
No Data to Display				
▼ History				
NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
Post-Tenure Review - Spring 2023 (Demo)	Dean	Me	April 17, 2023 @ 11:59 PM	▼
Probationary Annual Review (First-Year Review) - Spring 2023 (Demo)	Department Chair/School Director	Me	May 1, 2023 @ 11:59 PM	▼
Annual Faculty Evaluation System (FES) Review	Department Chair/School Director	Me	May 1, 2023 @ 11:59 PM	▼
Annual Faculty Evaluation System (FES) Review (demo)	Department Chair/School Director	Me	May 1, 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)	Completed	Me	January 29, 2023 @ 11:59 PM	▼
Probationary Annual Review (Third-Year Review) - Spring 2023 (Demo)	Department Chair/School Director	Me	May 1, 2023 @ 12:00 AM	▼
Tenure and/or Promotion Review - Spring 2023 (Test)	Department Promotion and Tenure Advisory Committee	Me	January 29, 2023 @ 6:00 AM	▼
Tenure and Promotion Review - Spring 2023 (Demo)	Department Promotion and Tenure Advisory Committee	Me	January 29, 2023 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023	Completed	Me	January 9, 2023 @ 11:59 PM	▼
Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track) (DEMO)	Department Chair/School Director	Me	May 1, 2023 @ 11:59 PM	▼
Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track Faculty) (Demo)	Department Chair/School Director	Me	May 1, 2023 @ 11:59 PM	▼

Recall

Download

## Department Chair/School Director Step

1. Beginning in the Workflow Tasks Inbox, click on the Annual Faculty Evaluation System Review entries.

Activities Reports Workflow

Workflow Tasks Tasks Submissions go).

Dates below are displaying in your (local) time zone (GMT-05:00).

▼ Inbox

NAME	STEP	CANDIDATE	DUE DATE
Annual Faculty Evaluation System (FES) Review (Tenured/Tenure-track Faculty) (Demo)	Department Chair/School Director	Test Faculty	May 1, 2023 @ 11:59 PM
Annual Faculty Evaluation System (FES) Review (demo)	Department Chair/School Director	Test Faculty	May 1, 2023 @ 11:59 PM

▼ History

NAME	CURRENT STEP	CANDIDATE	DUE DATE	ACTIONS
Test Annual Review - Test Accounts (1st test)	Completed	Me	October 10, 2022 @ 11:59 PM	▼
Test Annual Review - Test Accounts (2nd test) (Alternate DPTAC)	Completed	Me	October 8, 2022 @ 11:59 PM	▼
Test 2 Spring 2023 Annual Review - Probationary Faculty (duplicate)	Completed	Me	September 22, 2022 @ 11:59 PM	▼
Test Spring 2023 Annual Review - Probationary Faculty	Completed	Me	September 20, 2022 @ 11:59 PM	▼
Tenure and/or Promotion Review - Spring 2023 (Test)	Completed	Me	November 12, 2022 @ 11:59 PM	▼

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.

Activities Reports Workflow

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

Submitted January 20, 2023 by Test Faculty

▼ Faculty Step - Test Faculty

### Annual Faculty Evaluation System (FES) 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 March 1st, 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

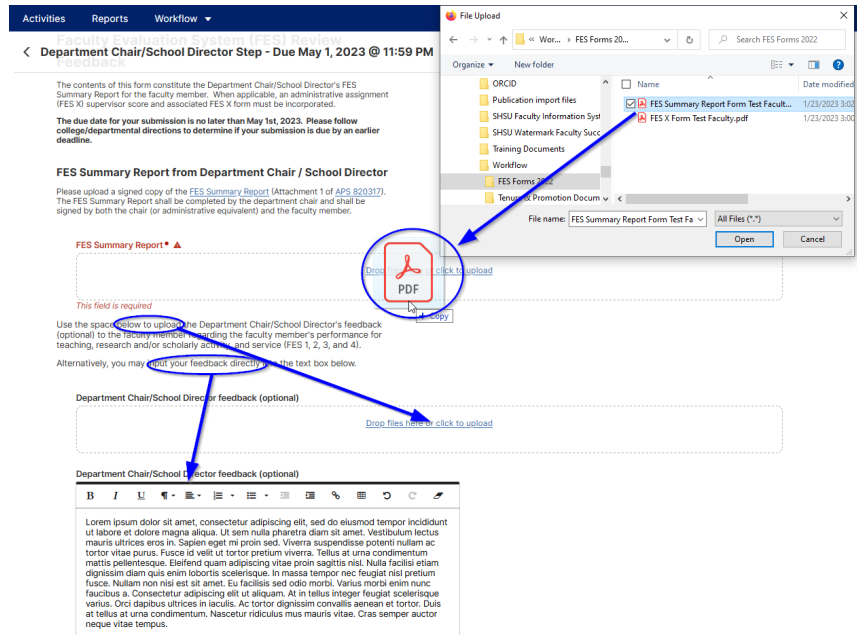
Use the space below to upload a copy of your current curriculum vita to be considered for your annual FES review.

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.

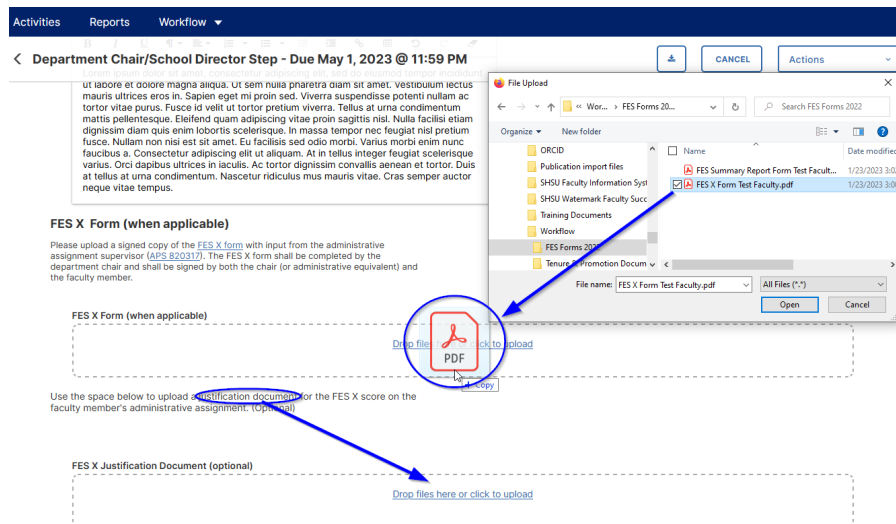
CV Upload

CV 2022 Test Faculty.docx (50.69 KB)

- 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 [FES Summary Report \(FES 5\)](#) 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.



- In some cases, the Department Chair/School Director step will also require the upload of an [FES X Form](#). 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.



- Once feedback is completed, the Department Chair/School Director can select from the Actions drop-down menu the Complete option and click Yes on the following popup box. This will complete the Annual Faculty Evaluation System (FES) Review process for this faculty member.

The screenshot shows a web interface for the 'Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM'. The breadcrumb trail is 'Department Chair/School Director Step - Due May 1, 2023 @ 11:59 PM' > 'Faculty Step - Test Faculty'. The main heading is 'Department Chair/School Director Annual Faculty Evaluation System (FES) Review Feedback'. Below the heading, there is a paragraph of text: 'The contents of this form constitute the Department Chair/School Director's FES Summary Report for the faculty member. When applicable, an administrative assignment (FES X) supervisor score and associated FES X form must be incorporated. 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.' Below this is another heading: 'FES Summary Report from Department Chair / School Director' and a paragraph: 'Please upload a signed copy of the FES Summary Report (Attachment 1 of APS 820317). The FES Summary Report shall be completed by the department chair and shall be signed by both the chair (or administrative equivalent) and the faculty member.' At the bottom, there is a file upload area with the text 'FES Summary Report' and a dashed box containing a file named 'FES Summary Report Form Test Faculty 2022.pdf (78.94 KB)'. On the right side, there is an 'Actions' dropdown menu with options: 'Save Draft', 'Complete', and 'Send Back to Previous Step'. The 'Complete' option is circled in blue.

This screenshot shows the same web interface as the previous one, but with a confirmation dialog box overlaid. The dialog box contains the text: 'Are you sure you want to Complete? This action cannot be undone.' Below the text are two buttons: 'No' and 'Yes'. The 'Yes' button is circled in blue. The background of the page is dimmed, showing the same breadcrumb trail, heading, text, and file upload area as in the previous screenshot.