# SHSU Watermark Workflow
Non-Tenure Track Promotion Help Guide

Watermark Workflow reviews for Non-Tenure Track Promotion follows the multistep process illustrated in the flowchart below. Beginning at the Faculty submission step, the review portfolio is swiftly run through a system validation step by the Office of Faculty Records (shown below as Start Portfolio Evaluation) and then is sent on to the Department Promotion Advisory Committee. The portfolio then moves through the administrative review steps until it reaches the Dean. After that review is submitted, the process is transferred to the Faculty Records step for final processing.
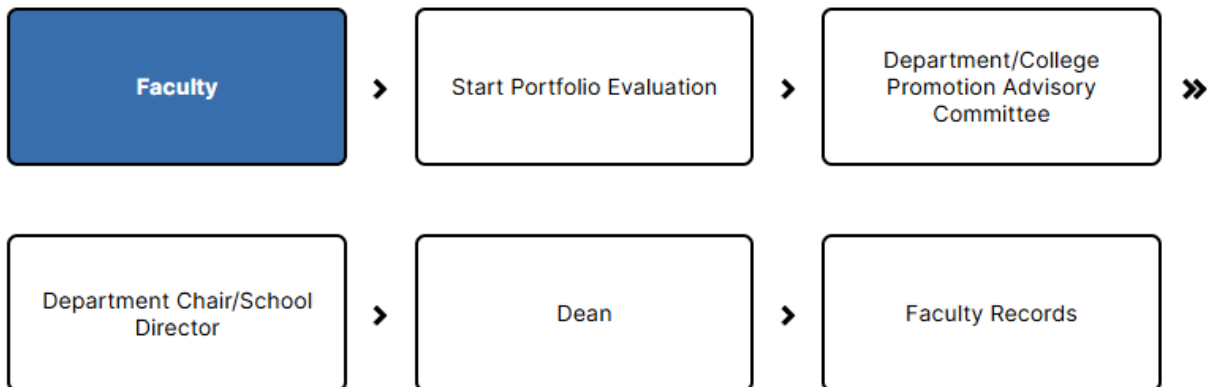
Email Messages

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 Promotion for Non-Tenure Track Faculty - Spring 2025
Due Date: Monday, January 13, 2025 11:59 PM CST

If you do not submit your materials by the due date, this will automatically advance to the Start Portfolio Evaluation review.

In accordance with APS 890301, non-tenure track faculty members who intend to be considered for promotion must upload a complete Faculty Review Portfolio in Watermark Workflow by the due date. Please reference the training resources on the Academic Affairs Watermark website for more information.

The due date for your submission is **no later than January 13, 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/9149cbf6-526b-4459-9de3-99e8e126ce0c/step/5ea6b91b-babf-4ec6-8e8e-b33727295ef4/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cf9fafa1-f655-4d2b-a0b6-9eaf04c80e4b&orgId=1660&personId=2390354

The Next step with faculty involvement will be the Departmental Promotion Advisory Committee (DPAC) 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 DPAC members and the DPAC chair will receive an automated email:

Dear Member DPAC,

The following submission is now ready for your review:

Process: TEST Promotion for Non-Tenure Track Faculty - Spring 2025
Candidate: Test Faculty
Due Date: Saturday, March 15, 2025 11:59 PM CDT

In accordance with APS 890301, the Department/College Promotion Advisory Committee will evaluate the faculty review portfolios of candidates being reviewed. Please reference the training resources on the Academic Affairs Watermark website for more information.

A written summary for each candidate will be uploaded into the Watermark Workflow by the DPAC Chair for the candidate. The summary must include a recommendation and vote tally for or against promotion. The due date for your submission is **no later than March 15, 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/9149cbf6-526b-4459-9de3-99e8e126ce0c/step/cc1ed068-5f22-40c8-85f1-1191957d28b0/assignee/2388404?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cf9fafa1-f655-4d2b-a0b6-9eaf04c80e4b&orgId=1660&personId=2388404

Dear Chair DPAC,

The following submission is now ready for your review:

Process: TEST Promotion for Non-Tenure Track Faculty - Spring 2025
Candidate: Test Faculty
Due Date: Saturday, March 15, 2025 11:59 PM CDT

In accordance with APS 890301, the Department/College Promotion Advisory Committee will evaluate the faculty review portfolios of candidates being reviewed. Please reference the training resources on the Academic Affairs Watermark website for more information.

A written summary for each candidate will be uploaded into the Watermark Workflow by the DPAC Chair for the candidate. The summary must include a recommendation and vote tally for or against promotion. The due date for your submission is **no later than March 15, 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/9149cbf6-526b-4459-9de3-99e8e126ce0c/step/cc1ed068-5f22-40c8-85f1-1191957d28b0/assignee/2388403?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cf9fafa1-f655-4d2b-a0b6-9eaf04c80e4b&orgId=1660&personId=2388403

The following step will be the Department Chair/School Director. Once the DPAC chair submits the DPAC vote and recommendation letter for Promotion 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 Promotion for Non-Tenure Track Faculty - Spring 2025
Candidate: Test Faculty
Due Date: Tuesday, April 1, 2025 11:59 PM CDT

In accordance with APS 890301, department chairs/school directors will evaluate the faculty review portfolios of candidates being reviewed. Please reference the training resources on the Academic Affairs Watermark website for more information.
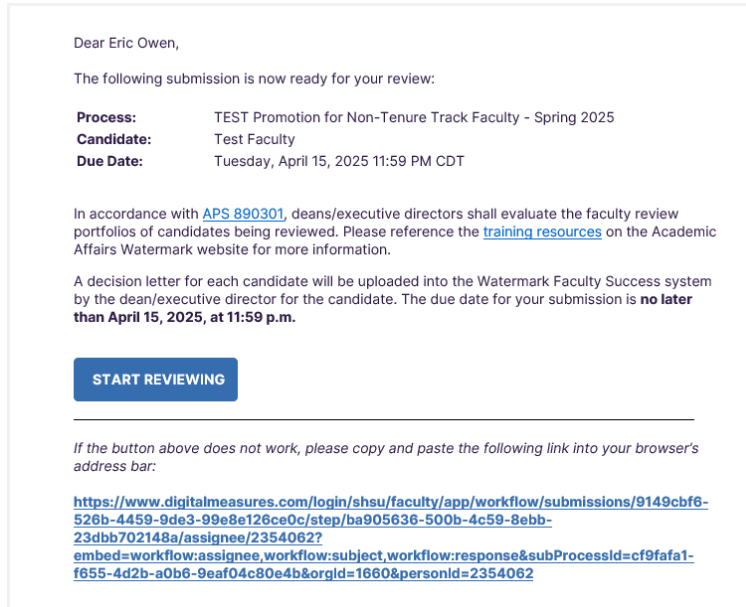
A recommendation letter for or against promotion for each candidate will be uploaded into the Watermark Faculty Success system by the department chair/school director for the candidate. The due date for your submission is **no later than April 1, 2025, at 11:59 p.m.**

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/9149cbf6-526b-4459-9de3-99e8e126ce0c/step/fee4e34c-56ea-4bb0-89a9-f36f9f239294/assignee/2357490?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cf9fafa1-f655-4d2b-a0b6-9eaf04c80e4b&orgId=1660&personId=2357490

The next step will be the Dean's step. Once the Department Chair/School Director has submitted their review and recommendation letter for Promotion in Watermark Workflow, the College Dean/Executive Director will receive an automated email:

Dear Eric Owen,

The following submission is now ready for your review:

Process:	TEST Promotion for Non-Tenure Track Faculty - Spring 2025
Candidate:	Test Faculty
Due Date:	Tuesday, April 15, 2025 11:59 PM CDT

In accordance with APS 890301, deans/executive directors shall evaluate the faculty review portfolios of candidates being reviewed. Please reference the training resources on the Academic Affairs Watermark website for more information.

A decision letter for each candidate will be uploaded into the Watermark Faculty Success system by the dean/executive director for the candidate. The due date for your submission is **no later than April 15, 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/9149cbf6-526b-4459-9de3-99e8e126ce0c/step/ba905636-500b-4c59-8ebb-23dbb702148a/assignee/2354062?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cf9fafa1-f655-4d2b-a0b6-9eaf04c80e4b&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.
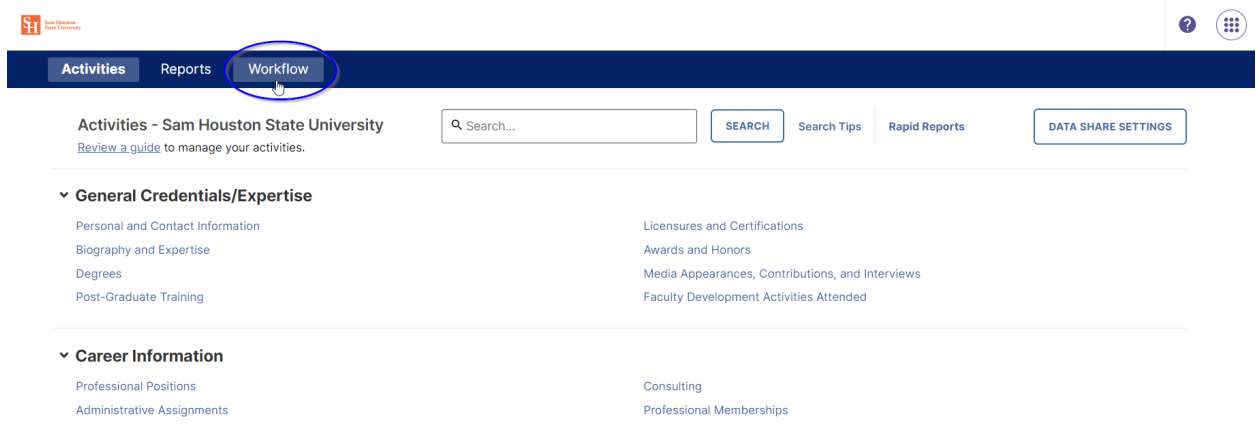
Watermark Workflow Tasks

1. When you click the Workflows link, you will see the Workflow Tasks interface with both an Inbox and History section – the numbers in the parentheses show how many items you have in those sections.

   The **Inbox** section will contain links to any tasks currently at a step where your input is required. The number in the parentheses next to Inbox shows the count of how many tasks you currently have assigned for your input. The column headers for the Inbox shows the following:

   - **Name** - the current review listing the review template for this workflow process
   - **Step** - the step within a workflow review process is currently located
   - **Department** – the SHSU academic department of the current review
   - **Candidate** – the name of the faculty member being reviewed in this process
   - **Due Date** – the date the current review process step must be submitted
   - **Date Received** – the date the current review process has appeared in your Inbox

   You can sort the Inbox tasks by any of the columns – in the example the tasks are sorted by the Due Date (Ascending from soonest to latest dates.)

Workflow Tasks interface

Activities Reports Workflow

Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

˅ Inbox (8)

▶ Show Filters (0)

NAME ⇅ ▾	STEP ▾	DEPARTMENT ▾	CANDIDATE ▾	DUE DATE ▾	DATE RECEIVED ▾
TEST Tenure and/or Promotion Review - Spring 2025	Faculty	University Wide	Me	Sort	
TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Faculty	University Wide	Me	Sort Order	4:41
TEST Post-Tenure Review - Spring 2025	Faculty	University Wide	Me	↓½ ASCENDING ↓⅗ DESCENDING	9:45
TEST Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:35 AM
TEST Annual Review - Probationary Faculty (First-Year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:15 AM
TEST Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 10:24 AM
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025	Faculty	University Wide	Me	February 1, 2025 @ 11:59 PM	November 11, 2024 @ 9:54 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

(Sort popup: **APPLY**)

˃ History (22)

2. When you have the Inbox opened, you will also see a **Show Filters** option between the work Inbox and the Name column header. Show Filters allows you to apply various filters (based upon the column headers) to the visible Inbox tasks. The Show Filters link toggles with a Hide Filters option; the number shown in the parentheses counts how many filters you currently have applied. You can remove Filters either by clicking on the X next to any selected filter option, or remove all Filters by clicking on the Reset Filters link.

Activities Reports Workflow

Workflow Tasks

Keep track of outstanding tasks in your inbox, and view your review history.

˅ Inbox (8)

▶ 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	November 8, 2024 @ 10:56 AM

Last Updated 11/20/2024

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.

Last Updated 11/20/2024

Watermark Workflow Non-Tenure Track Promotion Process Steps

Faculty Step

4. Under the Workflows Tasks Inbox click on the Promotion Review to begin entering your portfolio.

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).
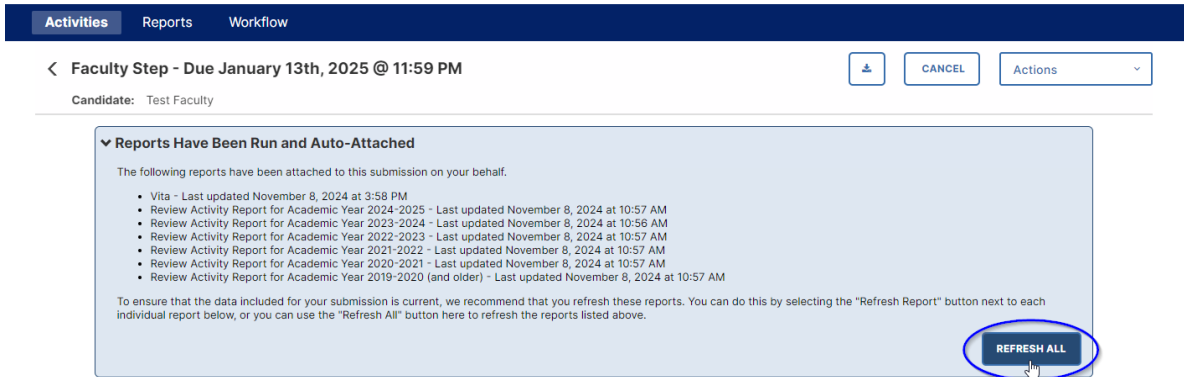
6. When working on your faculty review portfolio, click on the **"Actions"** button in the upper right and select "**Save Draft**" until your submission form is complete. You must click "Save Draft" to retain any entered or updated information if you wish to work on your review portfolio entries across several sessions logging into your Watermark account. If you close your browser window without saving, your work will not be retained.

7. Once you have completed your review portfolio, you should now click on "**Actions**" and select "**Submit to Start Portfolio Evaluation**" to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded **will not be saved.**

8. **Note: you will see the due date for your submission – in the case of the Non-Tenure Track Promotion, it is no later than January 13, 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. Faculty 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.
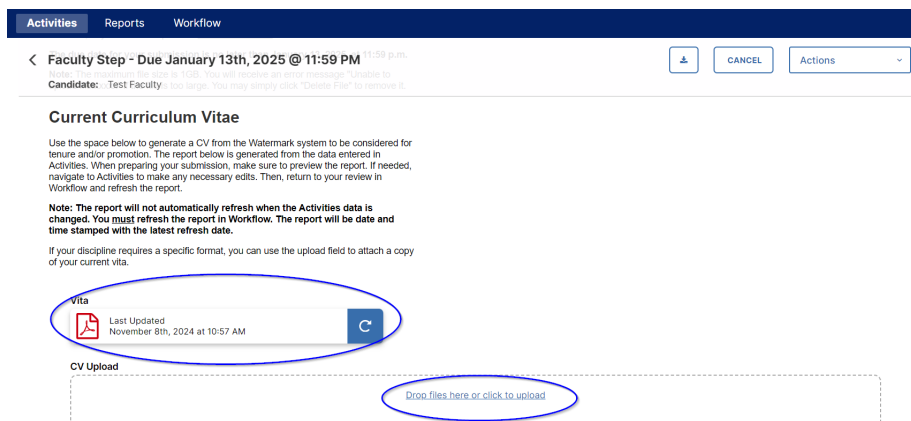
11. The automatically generated Vita in Watermark is created using information from your entries in the Activities module. You can view this automated CV by clicking on the Adobe Acrobat icon. The Last Updated date and time shows you when the current Vita report was created – this will initially be set 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.
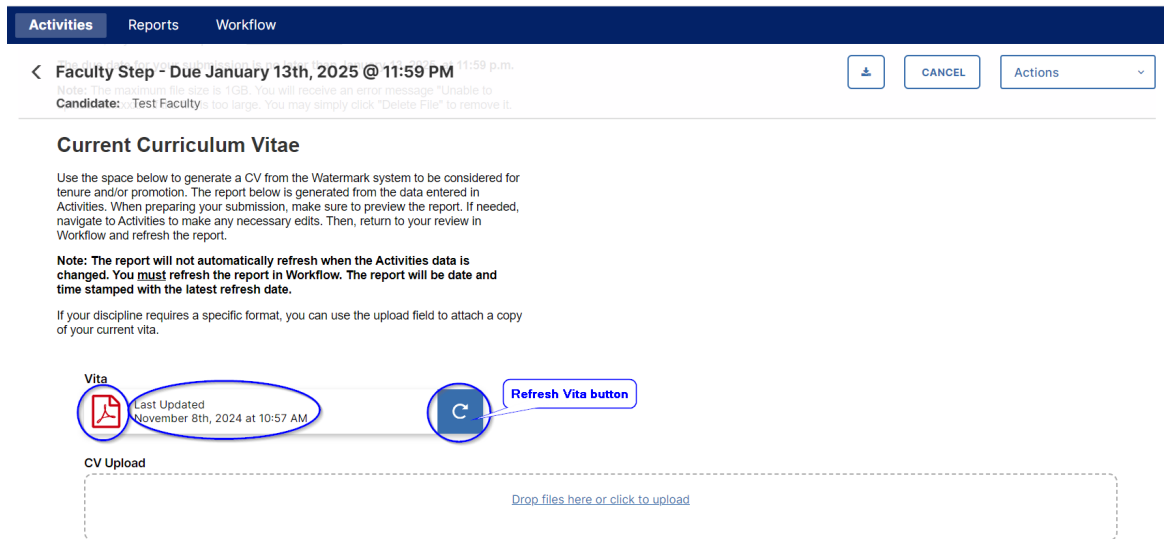
12. If you click on the Refresh icon to update the autogenerated Vita, you will see a popup screen detailing what will happen if you choose yes. The autogenerated report will be updated based on the most current Activities entries, and this cannot be undone. You may generate a current copy of your Vita 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.
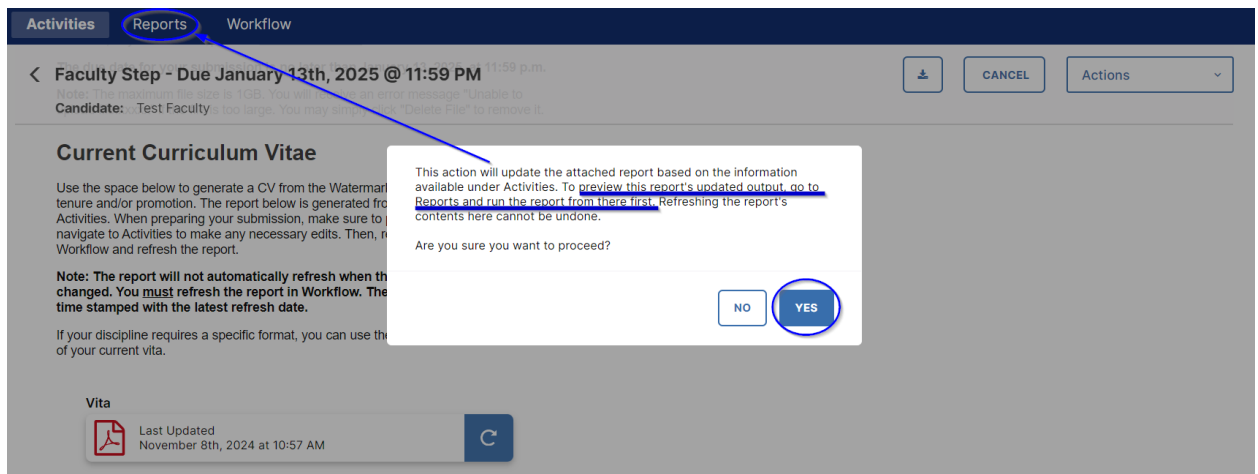
Once you have clicked Yes on the Vita Refresh popup window you will see the Last Updated date and time change.

13. Alternatively, you may upload or drag and drop files into the CV Upload area – any file type can be used.
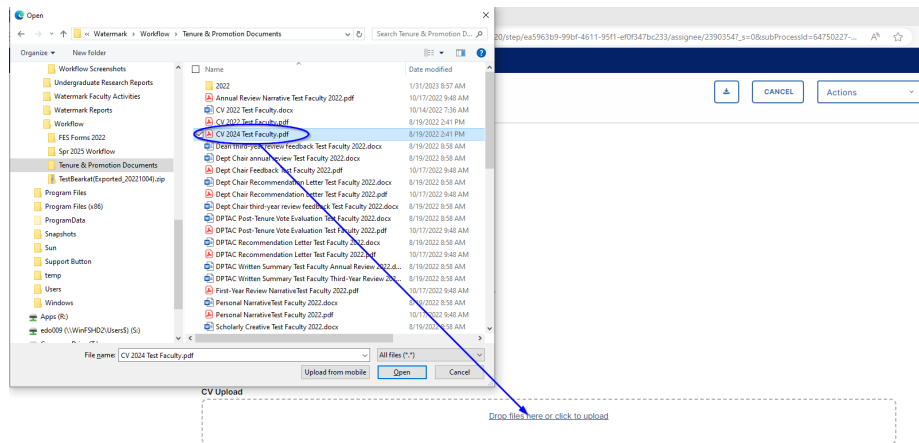
14. You can delete any files you have uploaded by mistake by clicking the trash can icon to the right of the file name.
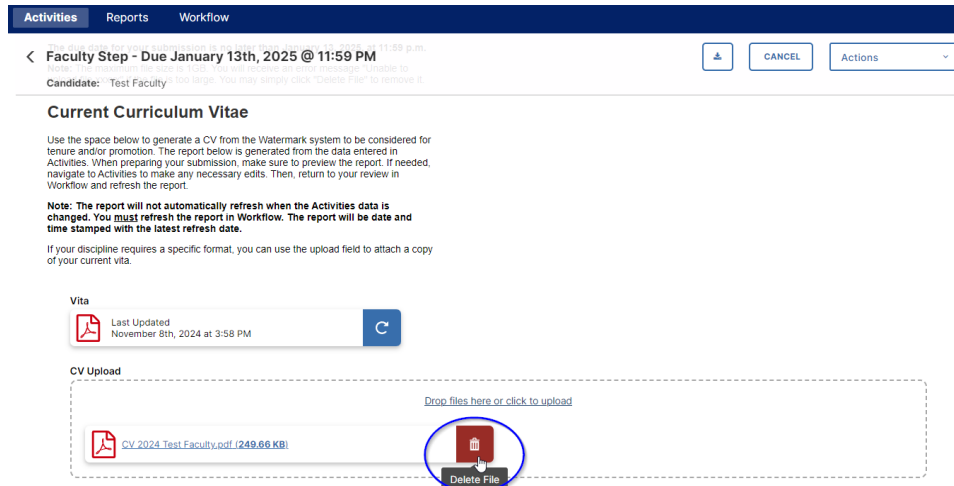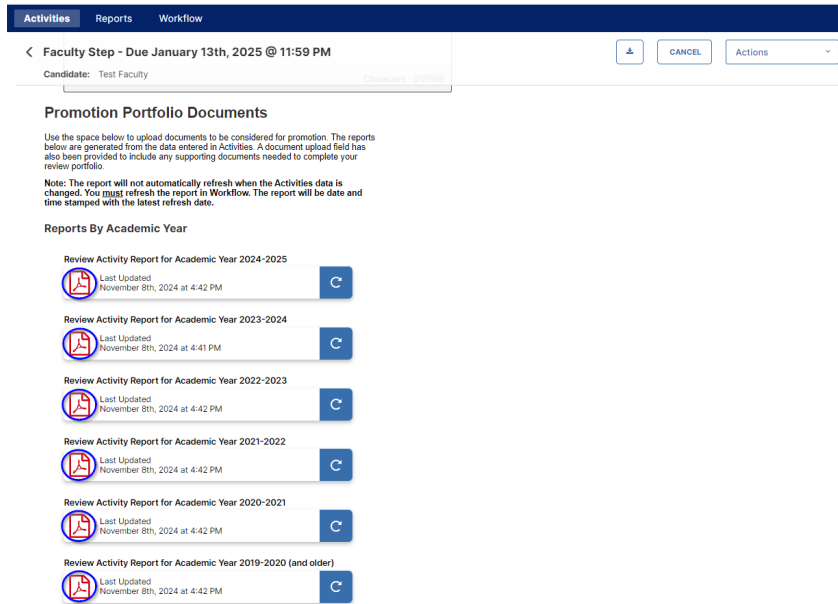
15. The next section of the Faculty Review Portfolio can be used to include a Personal Narrative. This is an optional step, and can be done either by uploading a file to the Personal Narrative Upload location, **OR** manually enter/cut and paste a narrative directly into the Text Box provided. The Text Box has a limit of just under 100,000 characters.
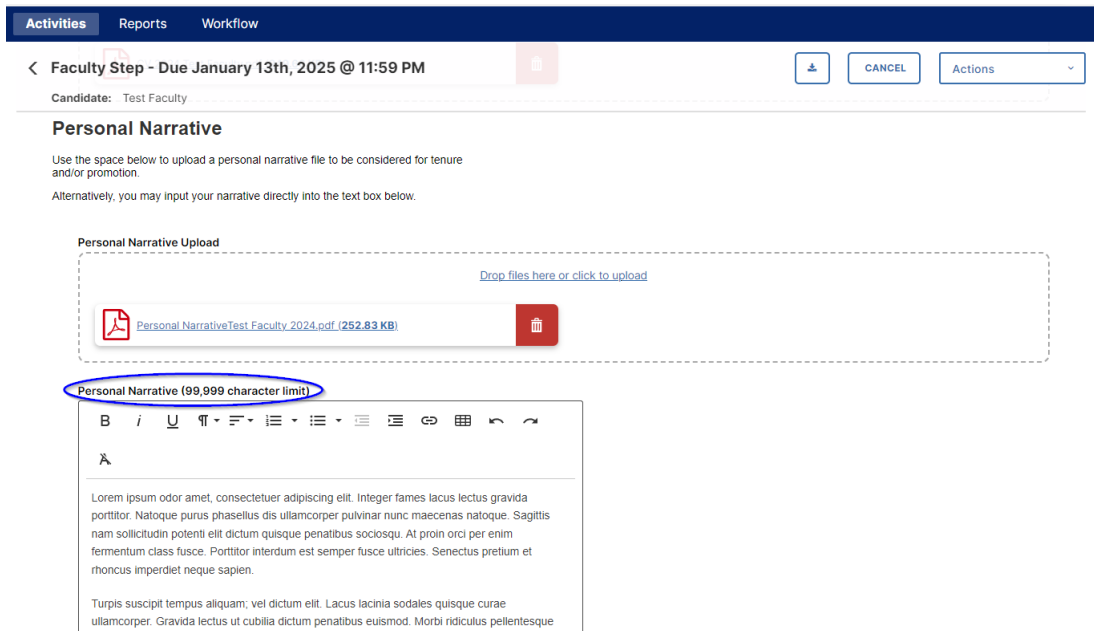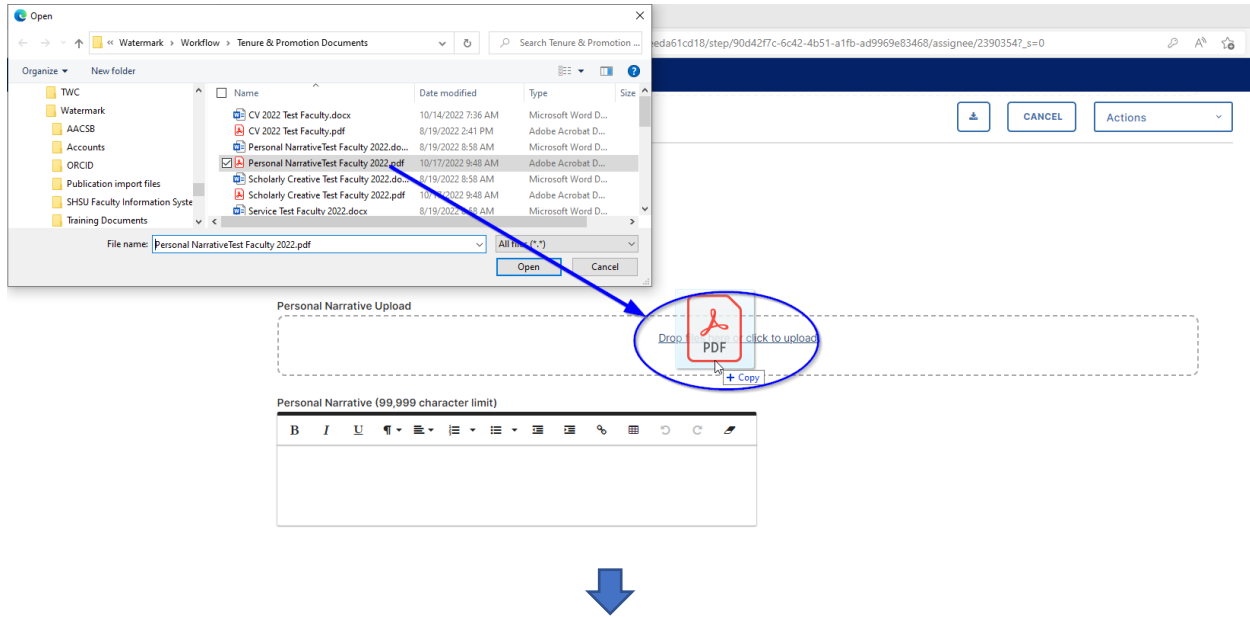
16. The final section of the Faculty Step is the Promotion Portfolio Documents area. This section provides several Review Activity Reports generated from your Activities records based upon Academic Years (these reports yearly dates range will span from September 1st until the following August 31st). These reports will not automatically refresh when the

Activities data is added or changed. You must refresh the report in Workflow reviews. Each report will be date and time stamped with the latest refresh date.
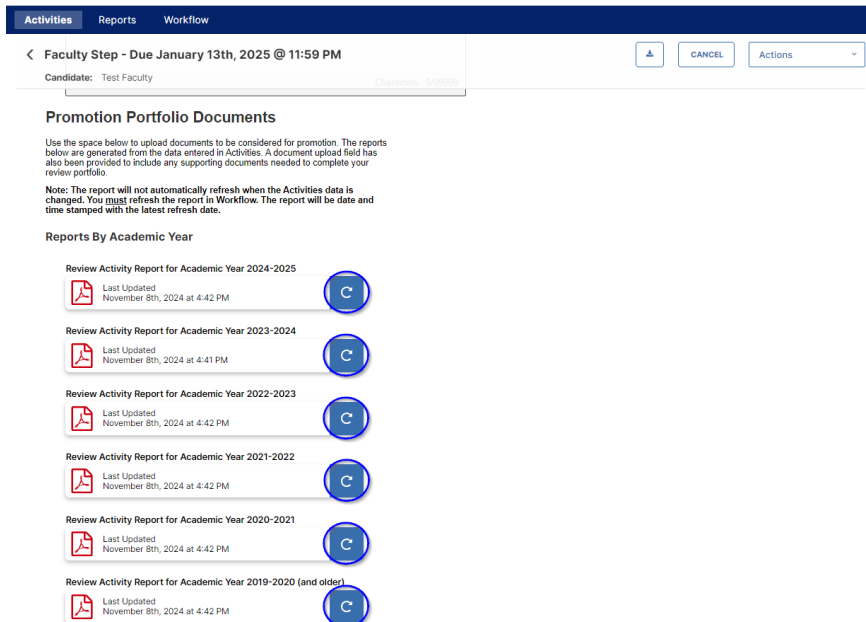
You can click on the Adobe Acrobat icon on the left to view the current Review Activity Report associated with that Academic Year. This will open an additional browser tab to display a PDF version of the report.

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 on the right of each report to update the report.

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.
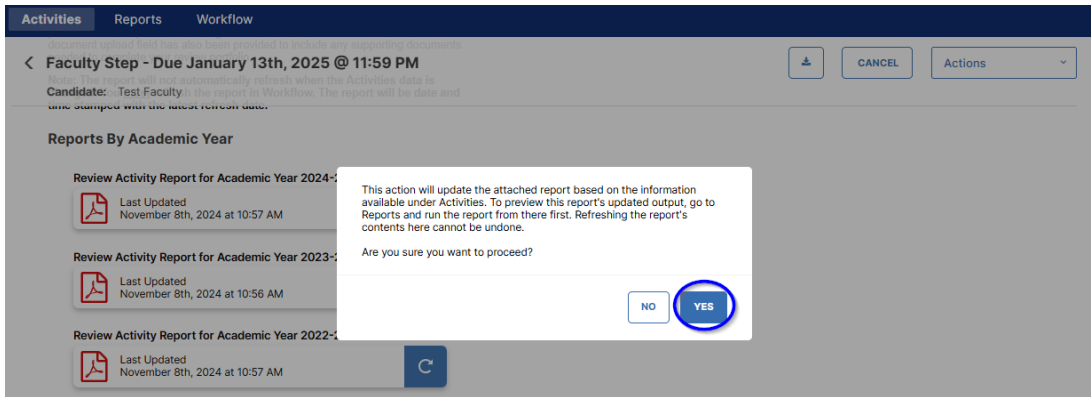
You may generate a current copy of a Review Activity Report by going to the Reports Tab and running a report with the same academic year date range being used in your portfolio documents. This will create a report in one of three file formats (MS Word, PDF, or HTML) for you to view before refreshing the version in your review portfolio.

Last Updated 11/20/2024
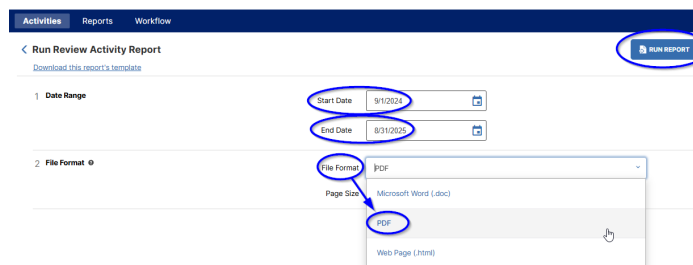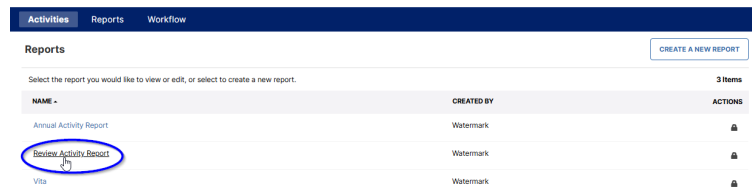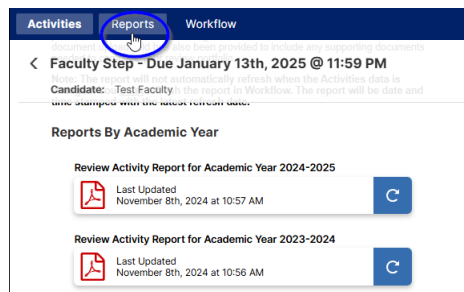
17. In addition to the Review Activity Reports generated from your Activities database entries, there is also an area where you may upload or drag and drop files with any other Supporting Documents for your review portfolio – any file type can be used. **This is the best location to add any IDEA Qualitative Reports that will be used in your evaluation.**
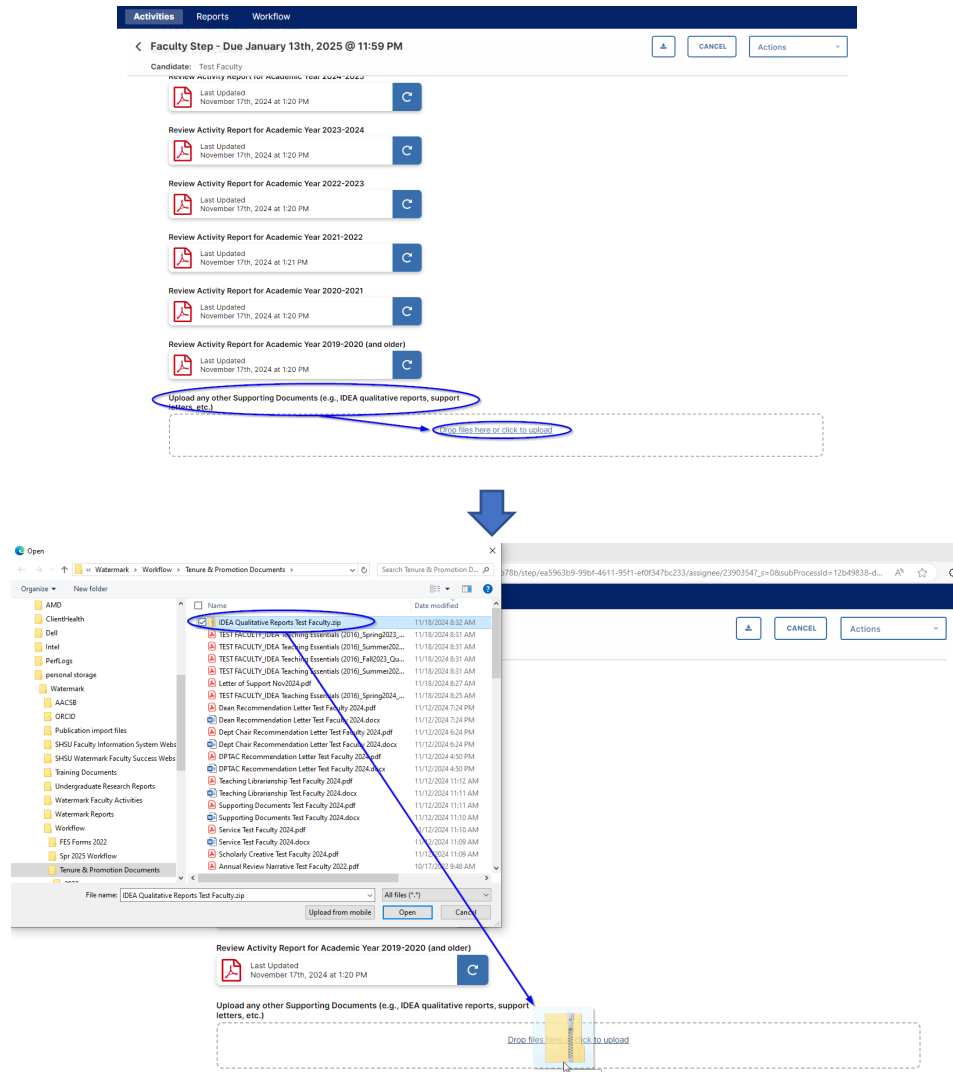
Note: Your materials will be displayed to reviewers exactly as they appear on your faculty submission page. Files uploaded within each of the upload fields will appear in two columns, moving from left to right, then top to bottom.
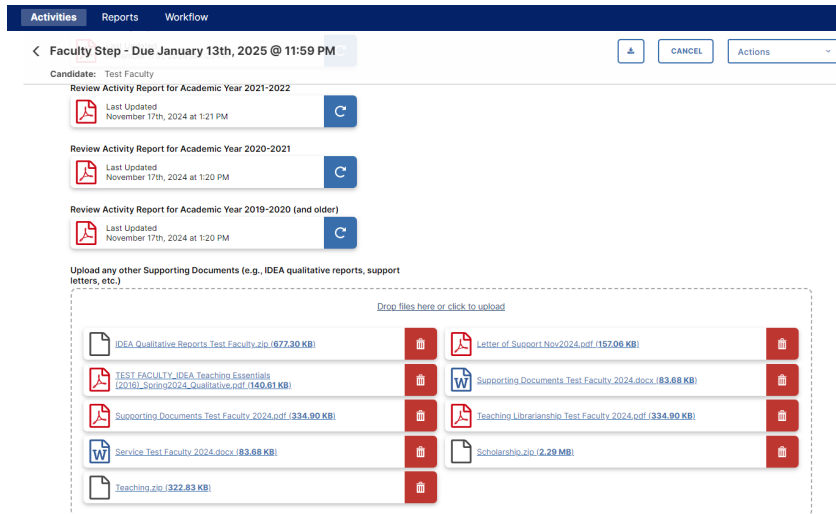
If you wish to provide files appearing in folders and subfolders, you are encouraged to save these files and structure them using a Zip file. To create a Zip file containing the desired folder structure, you may right-click (on a PC) on the top-level folder and select Send to -> Compressed (zipped) folder. 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.
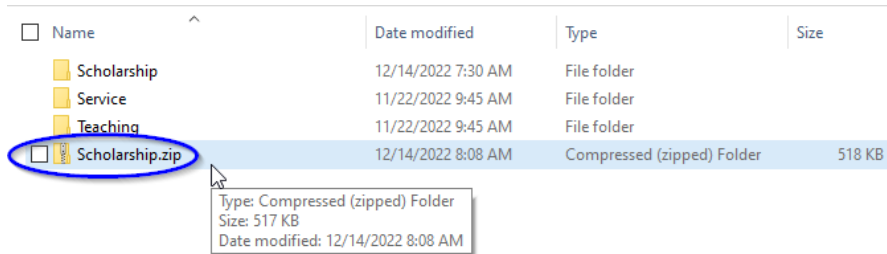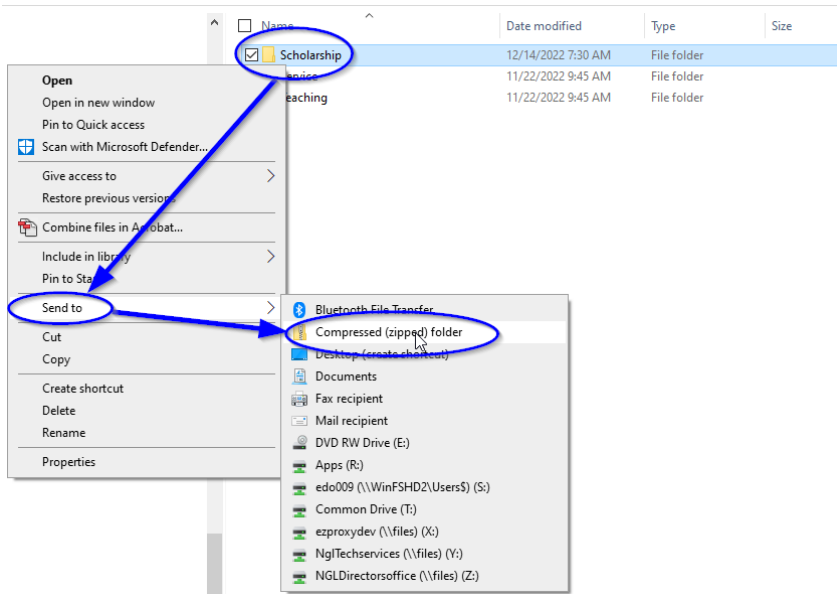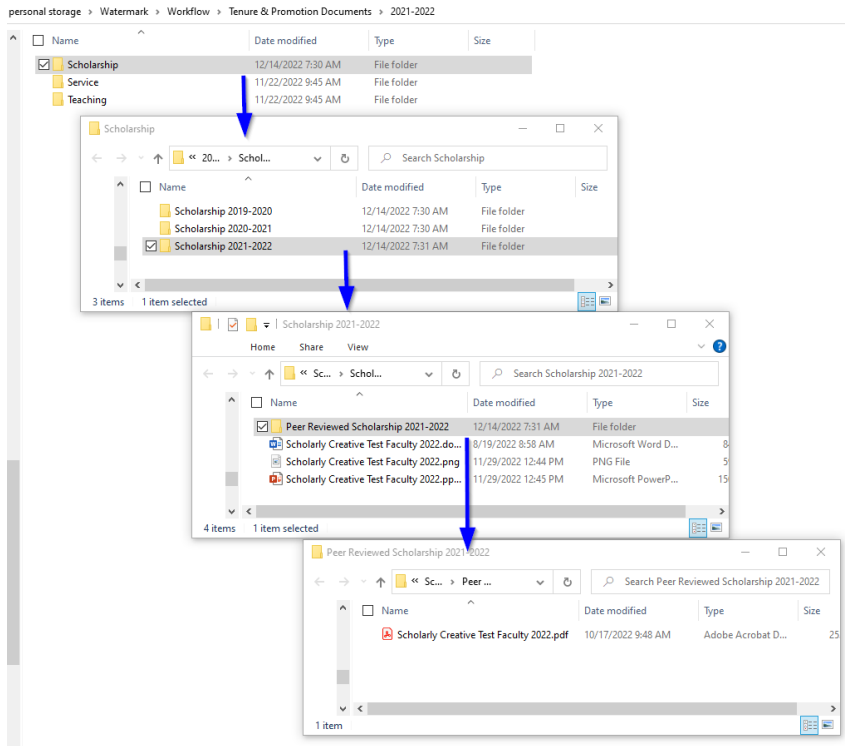
A reminder that you can click on Actions in the upper right and choose Save Draft to retain any entries and file uploads you have completed, but prior to a final submission to Start Portfolio Evaluation.
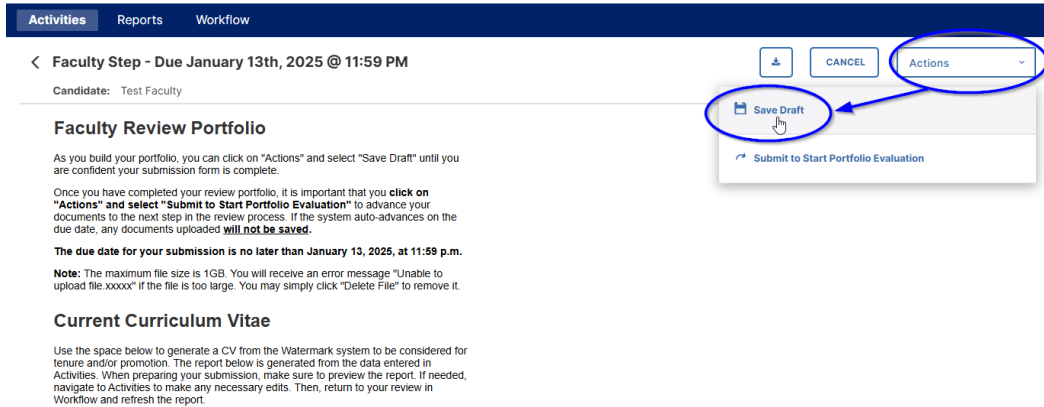
18. Once you have completed all of your entries and uploads for the Faculty Step, click on the Actions – Submit to Start Portfolio Evaluation and click Yes in the following popup window.
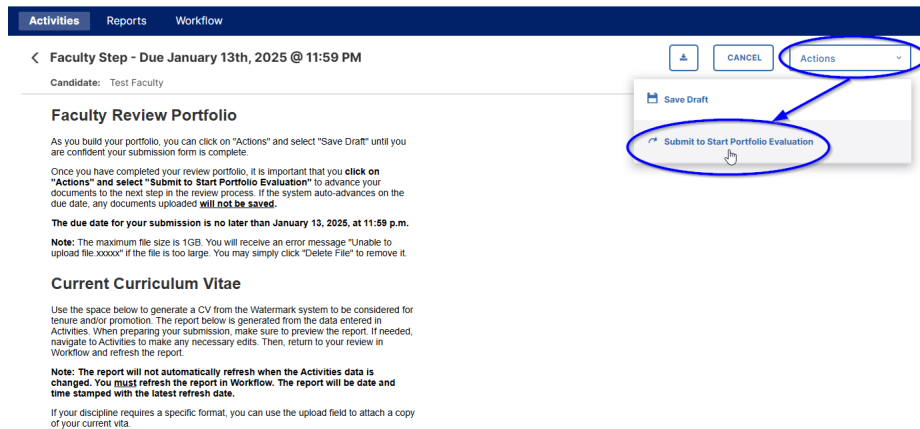
19.
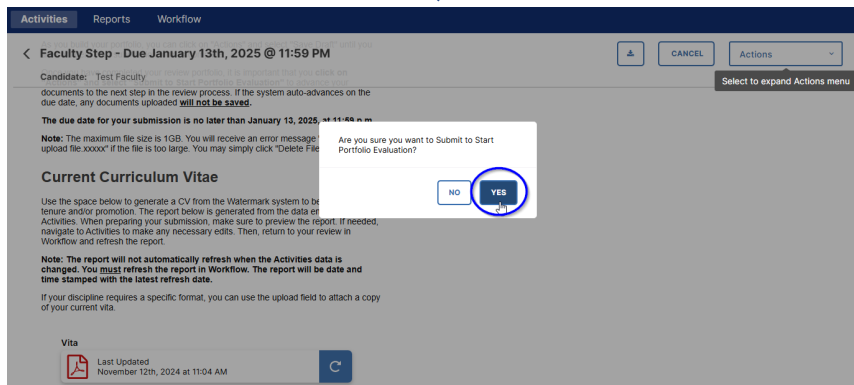
20. The Faculty Workflow Tasks screen will now show the item that has moved from the Inbox to History. This screen also shows at what step of the process the submission currently resides. The Due Date shows when the next step must be completed. The Actions down arrow allows the faculty member to Recall 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.

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.

As an example, here is the faculty view of a DPAC submission once the History Current Step has reached the Department Chair/School Director.

19

Department Promotion Advisory Committee Member/Chair Step

1. For faculty members serving on a Department Promotion Advisory Committee (DPAC), your Workflow Tasks Inbox will function the same way as Step #1 of Watermark Workflow Tasks on page 5 above. In the Workflow Tasks Inbox, you will see all review processes currently awaiting your input and submission. In this example you will see TEST Promotion for Non-Tenure Track Faculty - Spring 2025, currently at the Department/College Promotion Advisory Committee Step, in the University Wide Department, for the Candidate Test Faculty. The due date for your submission of your review step is March 15, 2025 @ 11:59 PM, and you received this submission available for your review on November 18, 2024 @ 10:45 AM.

2. Once you click on the review name, both DPAC members and the DPAC chair will see the first section of this step contains the candidate faculty's Review Portfolio, with all entries and links to uploaded files.

3. DPAC members and the chair can review all reports generated from the candidate's Watermark Activities by clicking on the Adobe Acrobat icons for the Vita and Review Activity Reports as well as field entries and links to uploaded files for the CV, Personal Narrative, and Other Supporting Documents.

4. There is a Start Portfolio Evaluation section that can show any Comments from the Faculty Records office concerning a Faculty Submission to the rest of the reviewing steps. Generally, this Comments field will be blank.

5. The next area of the screen will differ for DPAC members vs DPAC chair. DPAC 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.

6. For the DPAC Chair, after the Faculty Review Portfolio section, you will see a Committee Members and Responses section. This section can be viewed either By Member or By Response.

Within this area will be an Acknowledgement Text Box for the chair and each DPAC member. The DPAC member area shows whether or not they have completed their review of the portfolio to the right of the member's name. The status will either show as Unreviewed for those who have not published their Acknowledgement Response, or a Last Reviewed date for those members who have published their response.

7. The remaining section of the DPAC chair screen contains the Committee Response entries that will be submitted to the Department Chair/School Director including a

recommendation for promotion, and a file upload with the DPAC letter of recommendation. Both of these fields are required.

8. The DPAC 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 DPAC members to review the Committee's Response prior to submission.
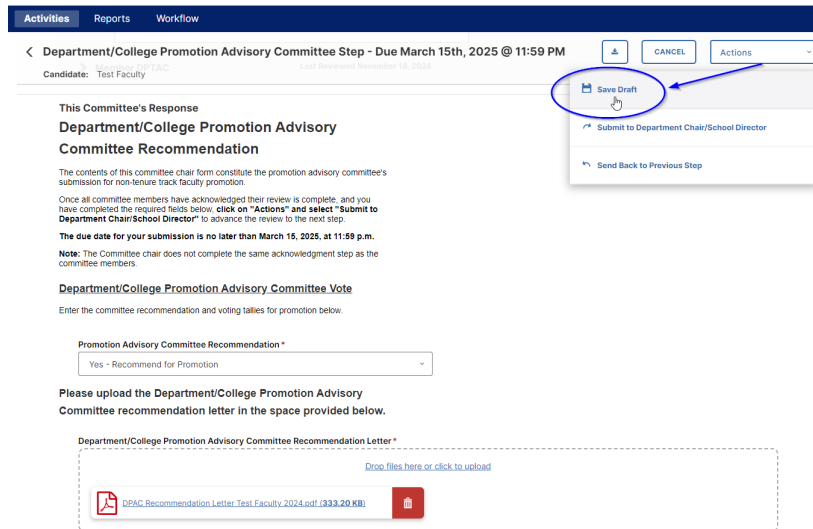
9. DPAC members can click on the Workflow Tasks Inbox item to see any drafts saved by the DPAC chair, including the Recommendations and access to the DPAC Recommendation Letter uploaded file.
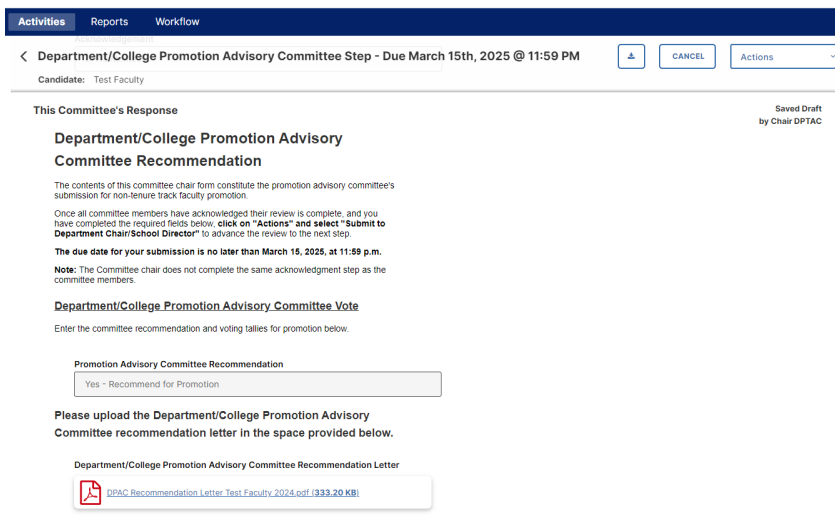
10. Once the DPAC has conferred and feels the Committee Response is complete, the DPAC Chair can select from the Actions drop-down menu the Submit to Department Chair/School Director option and click Yes on the following popup box.
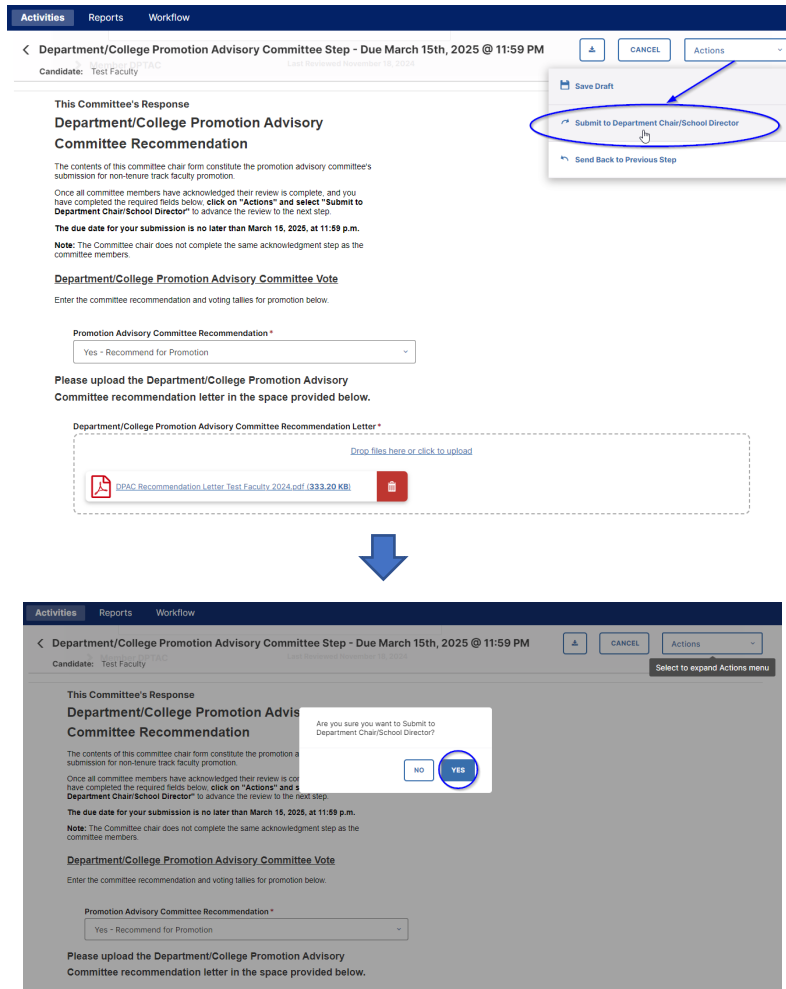
11. The option currently exists for participants in later steps of the Workflow process to Send Back to Previous Step from the Actions drop-down menu. This should only be done <u>after</u> consultation with the Faculty Records Office.

27
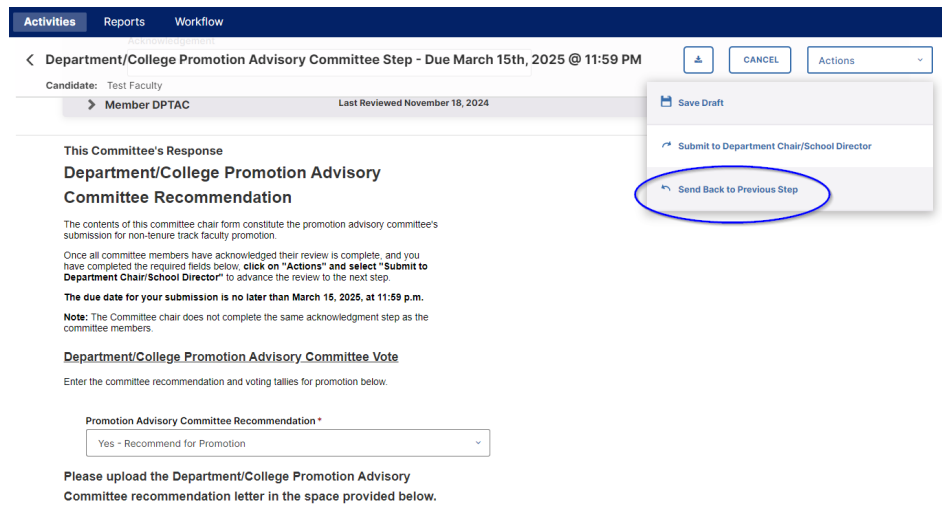
12. Once the DPAC Chair has submitted the Committee Response, the members and the chair of the DPAC will then see that process moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are available – with Recall only taking place prior to the submission due date or following consultation with the Department Chair/School Director.
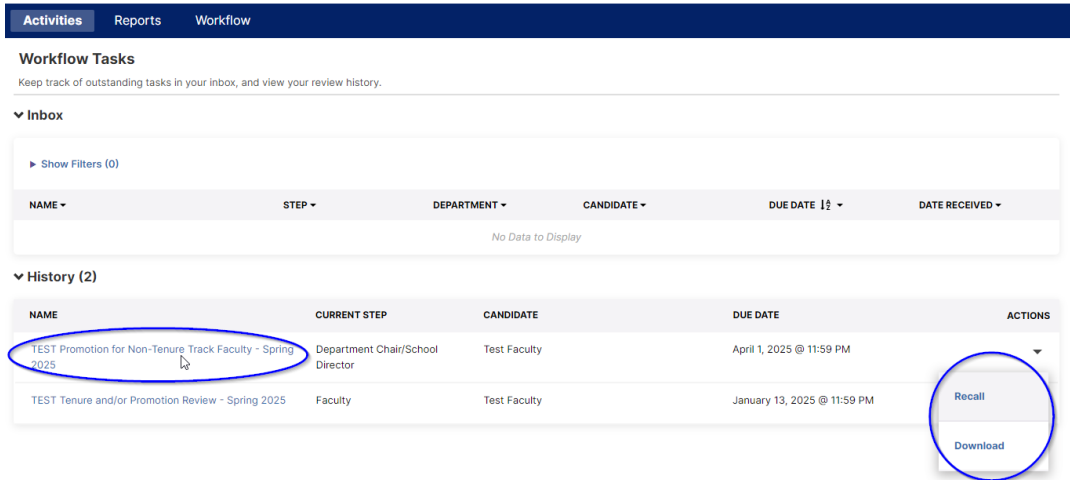
Department Chair/School Director Step

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.
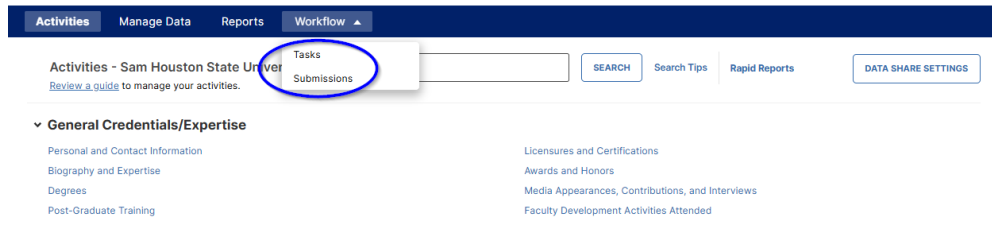
2. Current review processes waiting for the Department Chair/School Director input and submission, and historical review processes that have already received the Department Chair/School Director submissions are located in the Workflow Tasks. Workflow Tasks Inbox and History will function the same way as Step #1 of Watermark Workflow Tasks on page 5 above. In the Workflow Tasks Inbox, you will see all review processes awaiting your input and submission.

Last Updated 11/20/2024

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.

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

29

headers to narrow the Submissions displayed and run a Bulk Download of all these reviews.

4. To open a current review process, go to the Workflow Tasks and click on the Name of a review within the Inbox.

5. In the Department Chair/School Director step, the first section will contain the Faculty's Review Portfolio, with all reports, entries, and links to uploaded files. These submissions can be viewed following the same process as described in the DPAC section on page 20 above. This is followed by the brief Start Portfolio Evaluation (with any Comments, if applicable). Then, the Department Promotion Advisory Committee (DPAC) section contains their recommendation and uploaded letter.

6. The final section for the Department Chair/School Director step contains required fields with the recommendations for Promotion via drop-down menus, and a file upload area for their Recommendation Letter.

7. Once completed, the Department Chair/School Director can select from the Actions drop-down menu to the Submit to Dean option and click Yes on the following popup box.

8. Once the Department Chair/School Director has completed their submission to the Dean, 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 Dean.
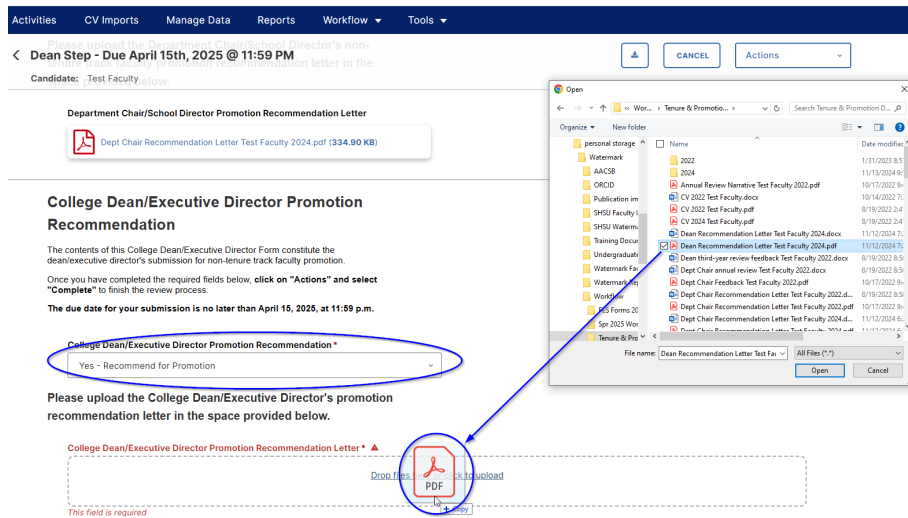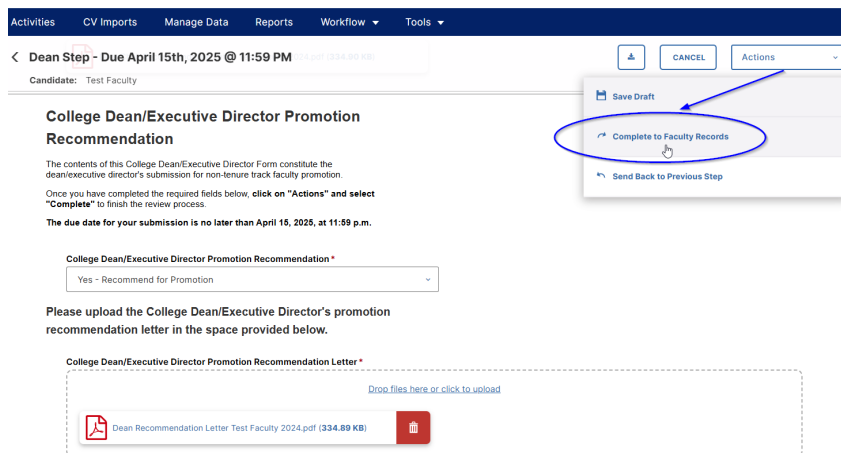

Dean/Executive Director Step

1. The Watermark Navigation bar for Deans and the Executive Director of Library Services includes the modules visible to Department Chairs/School Directors. The Workflow tab for a Dean has the Tasks and Submissions options, and they have all of the Tasks and Submissions available to a Department Chair/School Director, with the added ability to interact with all review processes that take place within their college – see the processes as described in the Department Chair/School Director step on page 28 above.

2. In the Dean/Executive Director step, the sections include the Faculty's Review Portfolio, the Start Portfolio Evaluation (with any Comments, if applicable), the DPAC section, and the Department Chair/School Director sections – all of which contain their associated reports, entries, uploaded documents, and recommendations.
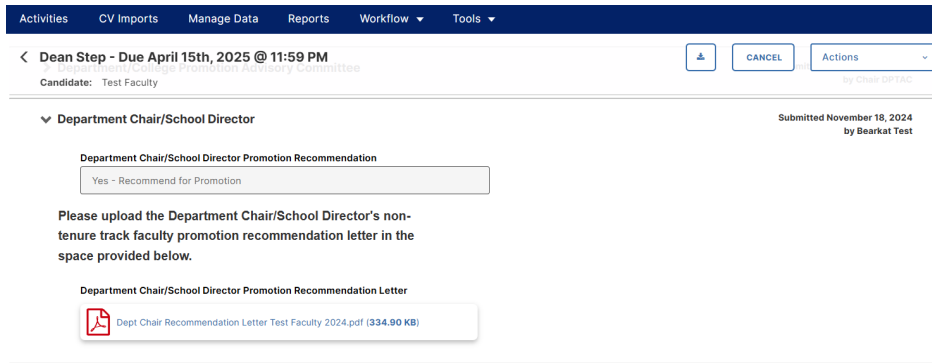
3. The final section for the Dean/Executive Director step contains required fields with the recommendation for Promotion via drop-down menus, and a file upload area for their Recommendation Letter.

4. Once completed, the Dean/Executive Director can select from the Actions drop-down menu to the Submit to Provost option and click Yes on the following popup box.

34

5. Once the Dean/Executive 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 completion due date or following consultation with the Faculty Records Office.

Last Updated 11/20/2024