SHSU Watermark Workflow
Annual Faculty Evaluation (NTT Faculty)
Review Process Help Guide

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

Email Messages

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

Dear Test Faculty,

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

Process:	TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025
Due Date:	Saturday, February 1, 2025 11:59 PM CST

In accordance with APS 890301, non-tenure track faculty members must upload a complete Faculty Review Portfolio in Watermark Faculty Success 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 February 1, 2025, at 11:59 p.m.**

SUBMIT REVIEW MATERIALS

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

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/28ffab6f-cad8-44a1-9f1c-30df205b8f7b/step/5115ca6c-1d15-4768-971f-3832ed1216f5/assignee/2390354?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cd63c62c-8eac-4618-9027-ad6e5a882dd5&orgId=1660&personId=2390354

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

Dear Bearkat Test,

The following submission is now ready for your review:

Process:	TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025
Candidate:	Test Faculty
Due Date:	Thursday, May 1, 2025 11:59 PM CDT

In accordance with APS 890301, the department chair/school director shall review the performance of faculty members. Please reference the training resources on the Academic Affairs Watermark website for more information.

A written summary for each faculty member will be uploaded into the Watermark Faculty Success system by the department chair/school director for the faculty member. The due date for your submission is **no later than May 1, 2025, at 11:59 p.m.**

START REVIEWING

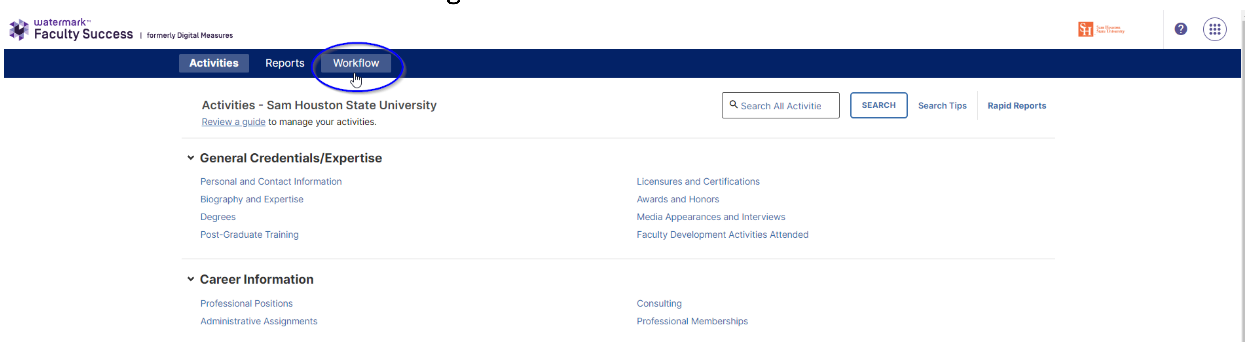
If the button above does not work, please copy and paste the following link into your browser's address bar:

https://www.digitalmeasures.com/login/shsu/faculty/app/workflow/submissions/28ffab6f-cad8-44a1-9f1c-30df205b8f7b/step/6eb5a2b1-1c26-4f45-9180-3155bb947c92/assignee/2357490?embed=workflow:assignee,workflow:subject,workflow:response&subProcessId=cd63c62c-8eac-4618-9027-ad6e5a882dd5&orgId=1660&personId=2357490

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

Logging into Watermark Faculty Success

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.

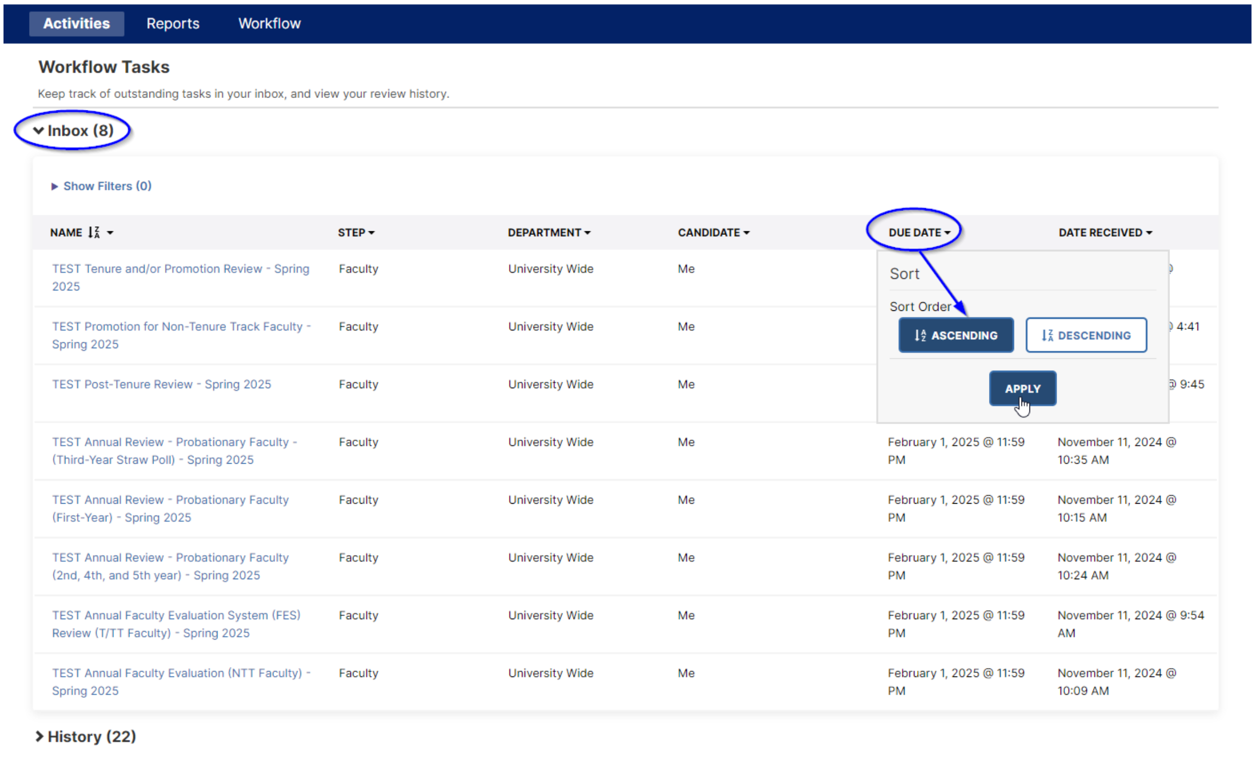
Watermark Workflow Tasks

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.

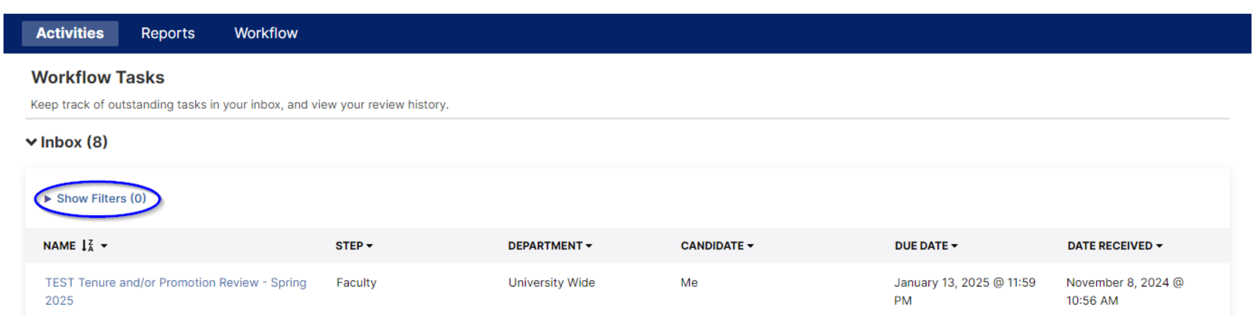
   The **Inbox** section will contain links to any tasks currently at a step where your input is required. The number in the parentheses next to Inbox shows the count of how many tasks you currently have assigned for your input. The column headers for the Inbox shows the following:

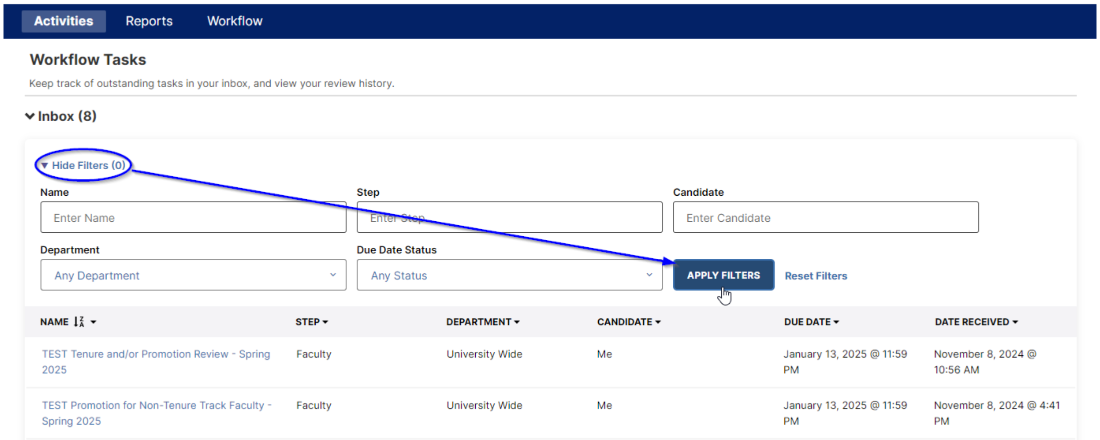
   - **Name** - the current review listing the review template for this workflow process
   - **Step** - the step within a workflow review process is currently located
   - **Department** – the SHSU academic department of the current review
   - **Candidate** – the name of the faculty member being reviewed 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

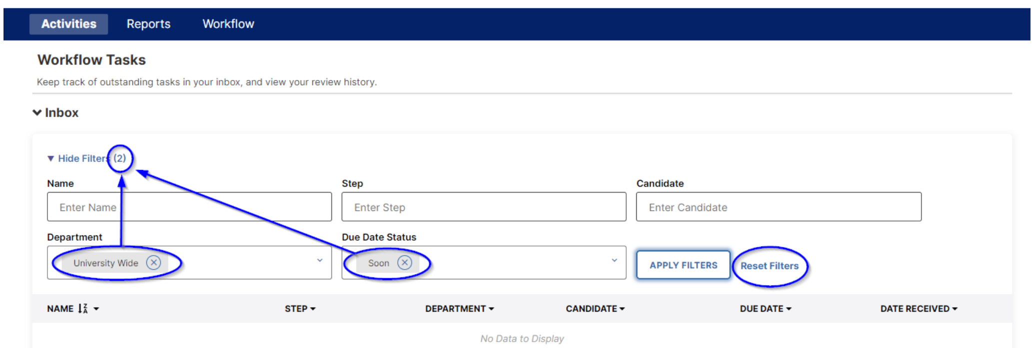
You can sort the Inbox tasks by any of the columns – in the example the tasks are sorted by the Due Date (Ascending from soonest to latest dates.)



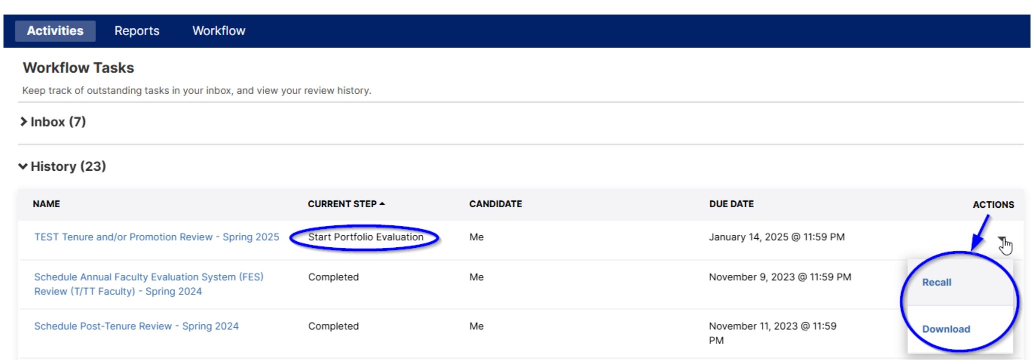
2. When you have the Inbox opened, you will also see a **Show Filters** option between the work Inbox and the Name column header. Show Filters allows you to apply various filters (based upon the column headers) to the visible Inbox tasks. The Show Filters link toggles with a Hide Filters option; the 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.

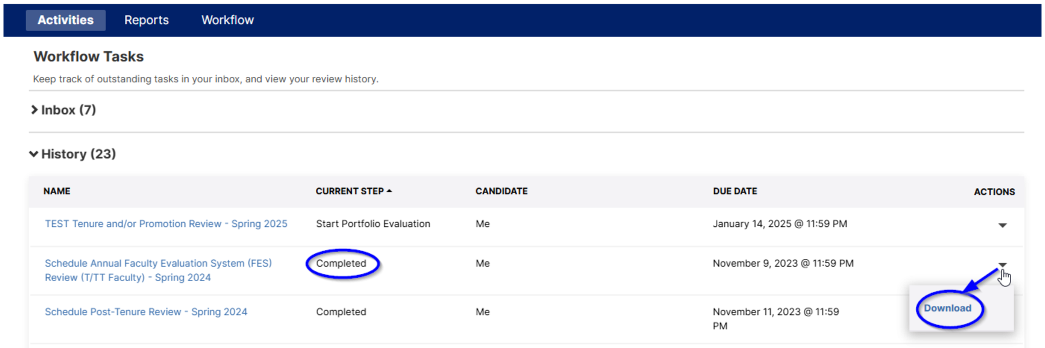






3. The **History** section will show a list of previous Watermark reviews. The Column headers are similar to the Inbox, with the addition of an Actions dropdown on the far-right column. The **Actions** button allows you to Recall or Download a Submission for Open reviews (those still in process). You 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.

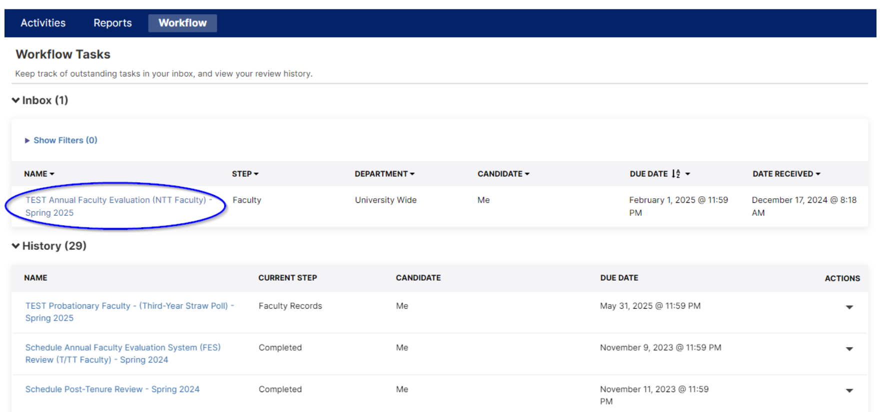




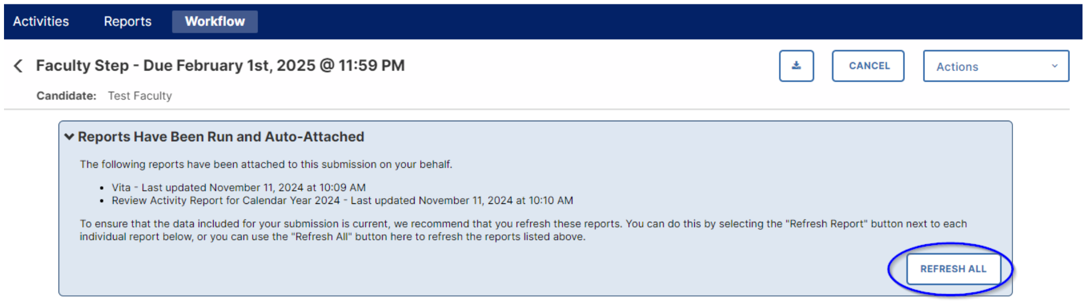
Watermark Workflow Annual Faculty Evaluation (NTT Faculty) Review Process Steps

Faculty Step

4. Under the Workflows Tasks Inbox click on Annual Faculty Evaluation (NTT Faculty) - Spring 2025 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).



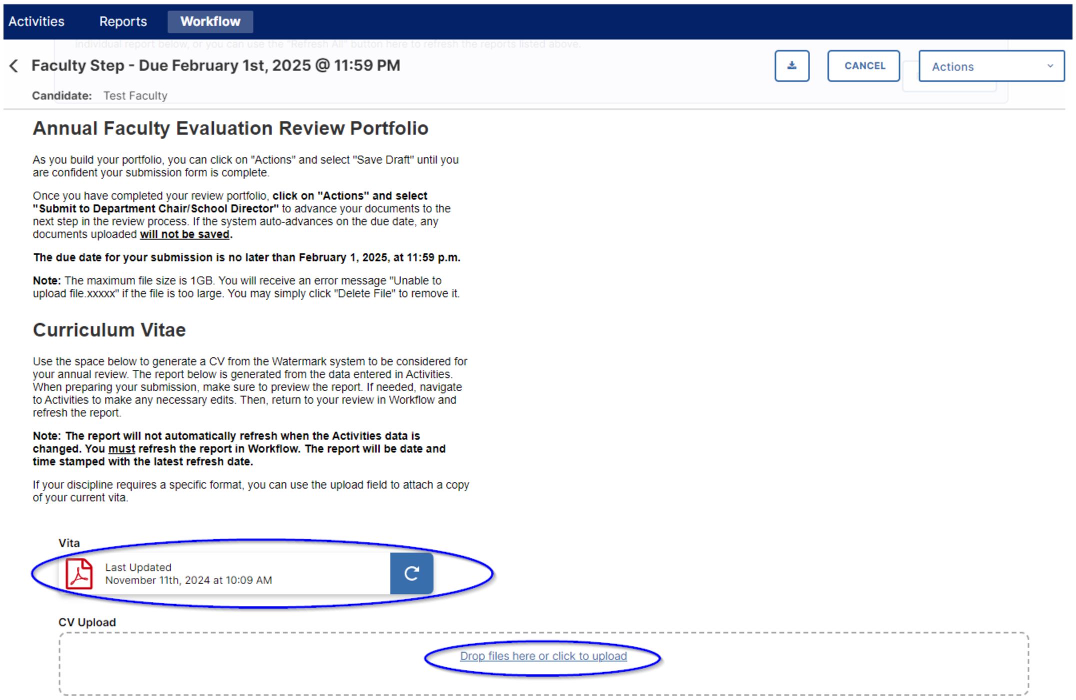
6. When working on your Annual Faculty Evaluation System (FES) review portfolio, click on the **"Actions"** button in the upper right and select "**Save Draft**" until your submission form is complete. You must click "Save Draft" to retain any entered or updated information if you wish to work on your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

7. Once you have completed your review portfolio, you should now click on "**Actions**" and select "**Submit to Department Chair/School Director**" to advance your documents to the next step in the review process. If the system auto-advances on the due date, any documents uploaded **<u>will not be saved</u>.**

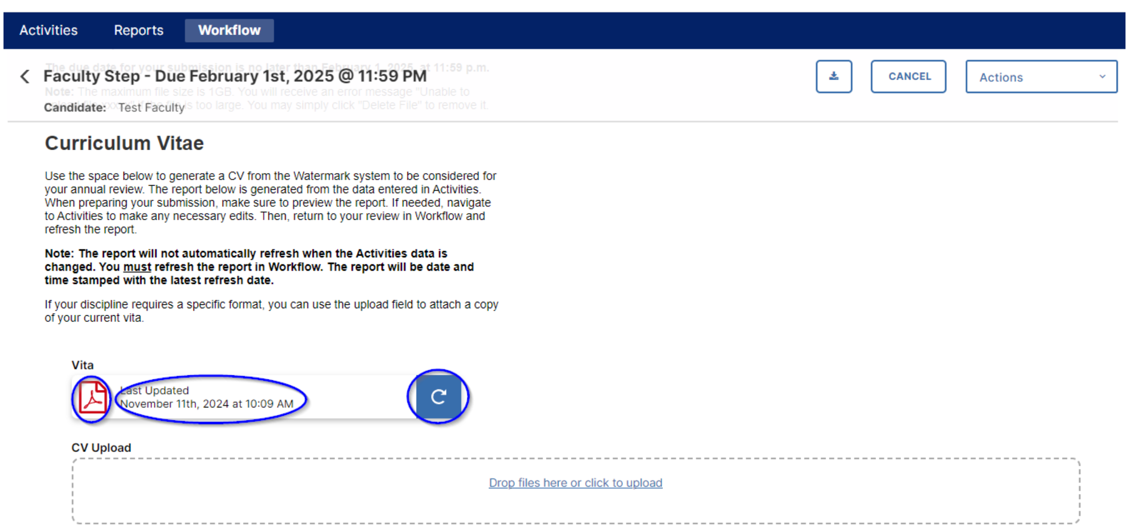
8. **Note: you will see the due date for your submission – in the case of the Annual Faculty Evaluation (NTT Faculty) Review, it is no later than February 1, 2025, at 11:59 p.m.**

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

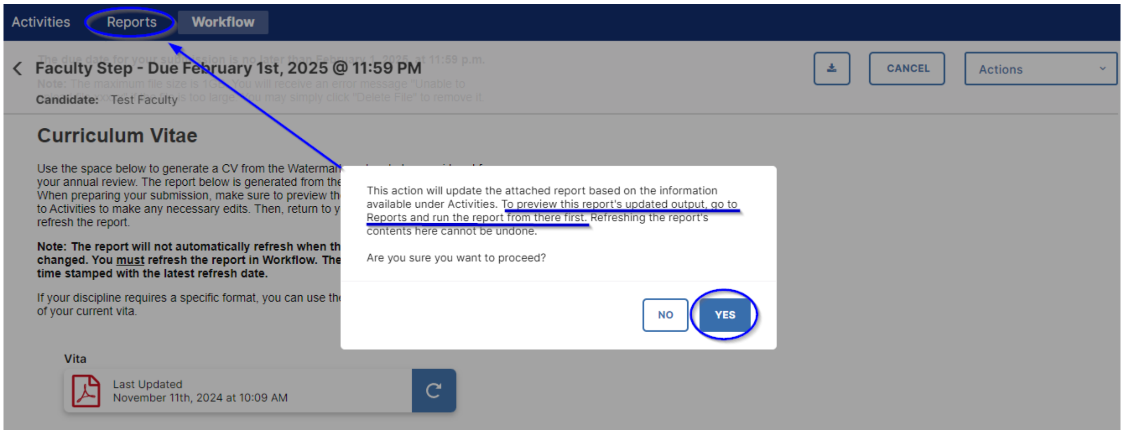
10. Annual Faculty Evaluation Review Portfolio screen provides areas for including a current Curriculum Vitae (CV). This can either be generated automatically based upon your activity's entries in Watermark, or there is a CV Upload area where you may choose to provide a CV file.



11. The automatically generated Vita in Watermark is created using information from your entries in the Activities module. You can view this automated CV by clicking on the Adobe Acrobat icon. The Last Updated date and time shows you when the current Vita report was created – this will initially be set at the date and time that the review process was first launched. If you make changes to your Activity Entries after starting a portfolio submission, but prior to submitting, you can update the auto generated Vita by clicking the Refresh button – which will also display the refreshed Vita's revised date and time. You may upload or drag and drop files in the CV Upload area – any file type can be used.



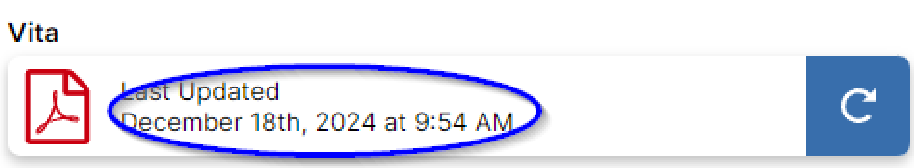
12. If you click on the Refresh icon to update the autogenerated Vita, you will see a popup screen detailing what will happen if you choose yes. The autogenerated report will be updated based on the most current Activities entries, and this cannot be undone. You may generate a current copy of your Vita report by going to the Reports Tab if you want to see what the resulting Vita will look like before refreshing the version in your review portfolio.



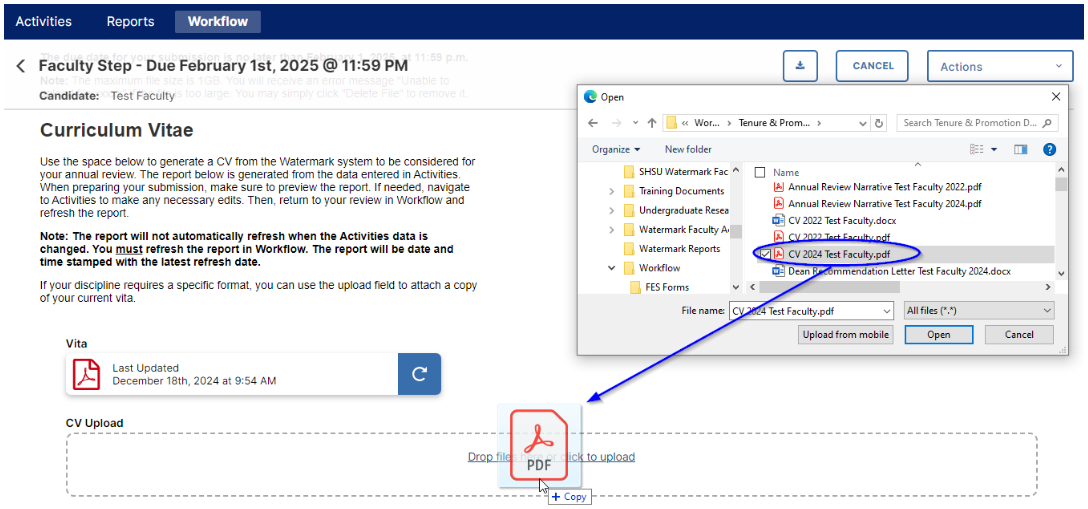
Once you have clicked Yes on the Vita Refresh popup window you will see the Last Updated date and time change.

Note: The report will not automatically refresh when the Activities data is changed. You <u>must</u> refresh the report in Workflow. The report will be date and time stamped with the latest refresh date.

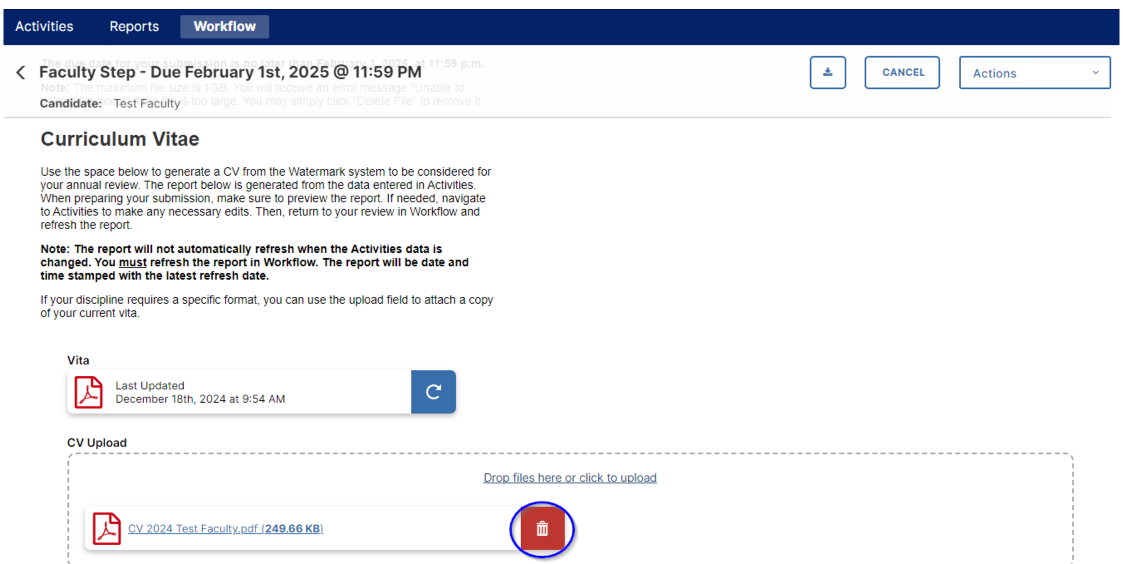
If your discipline requires a specific format, you can use the upload field to attach a copy of your current vita.



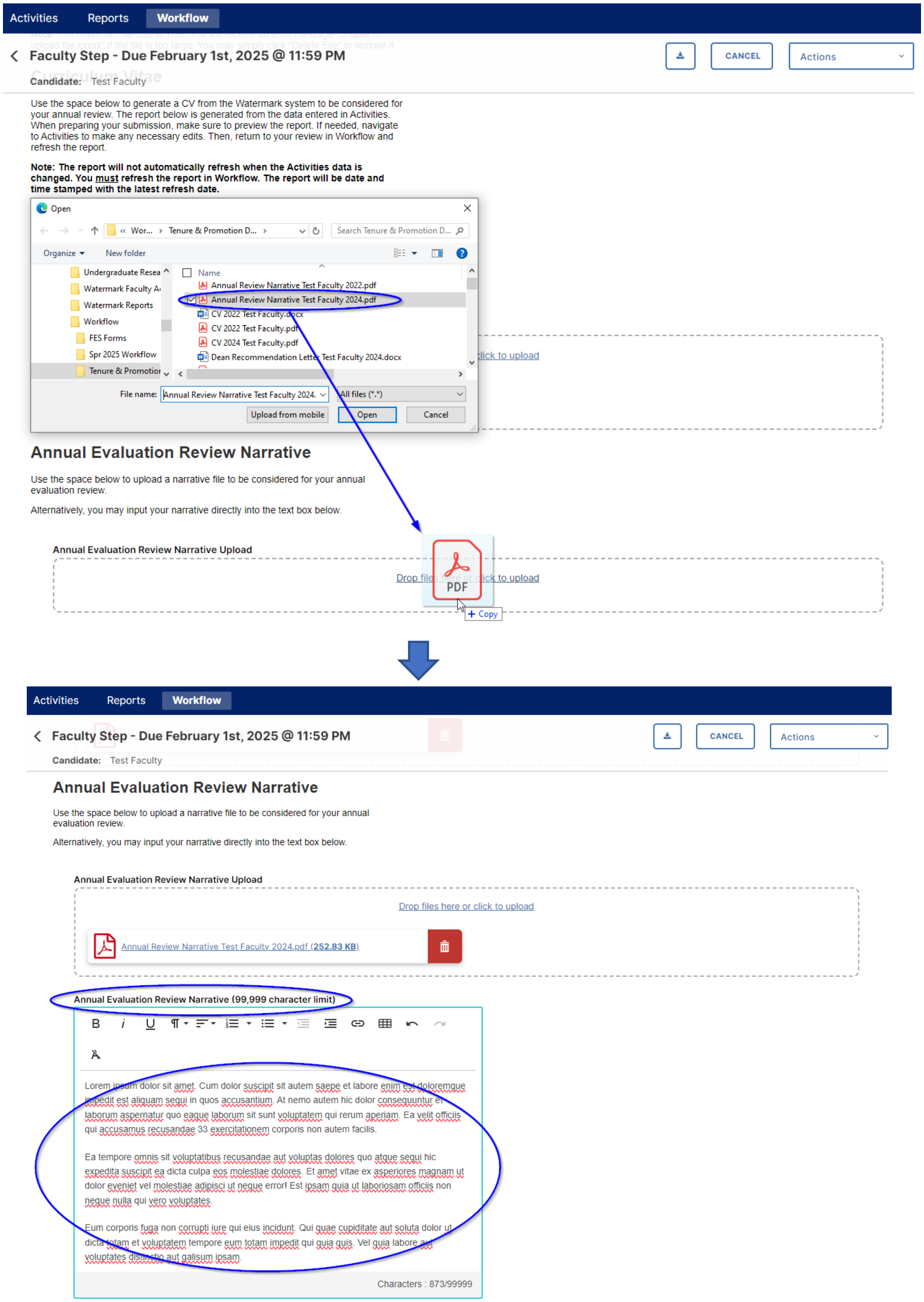
13. Alternatively, you may upload or drag and drop files into the CV Upload area – any file type can be used.



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



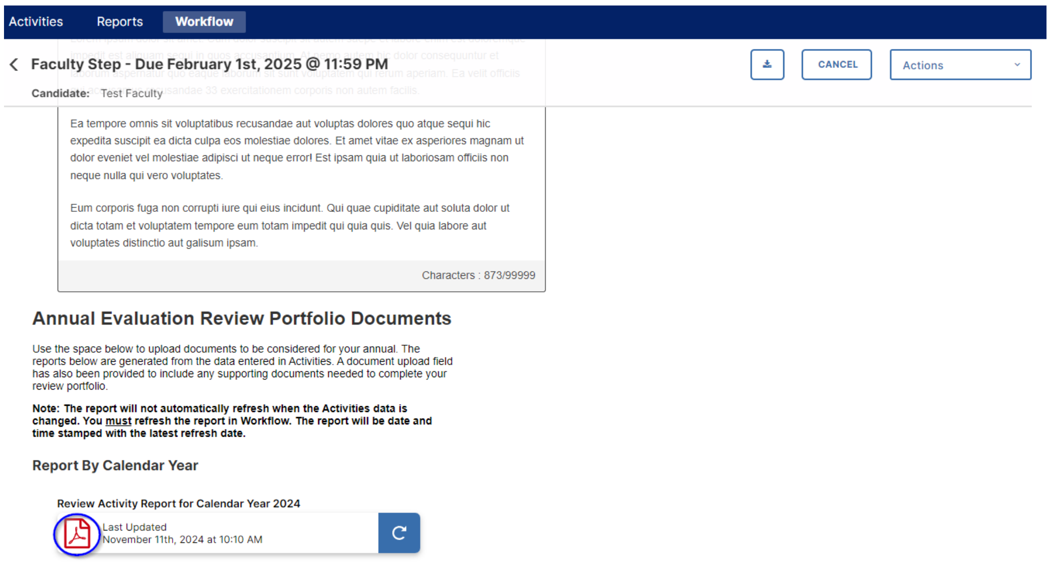
15. The next section of the Annual Faculty Evaluation Review Portfolio is a section for including an Annual Evaluation Review Narrative. This is an optional step, and can be done either by uploading a file to the Annual Evaluation Review Narrative Upload location, **OR** manually enter / cut and paste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



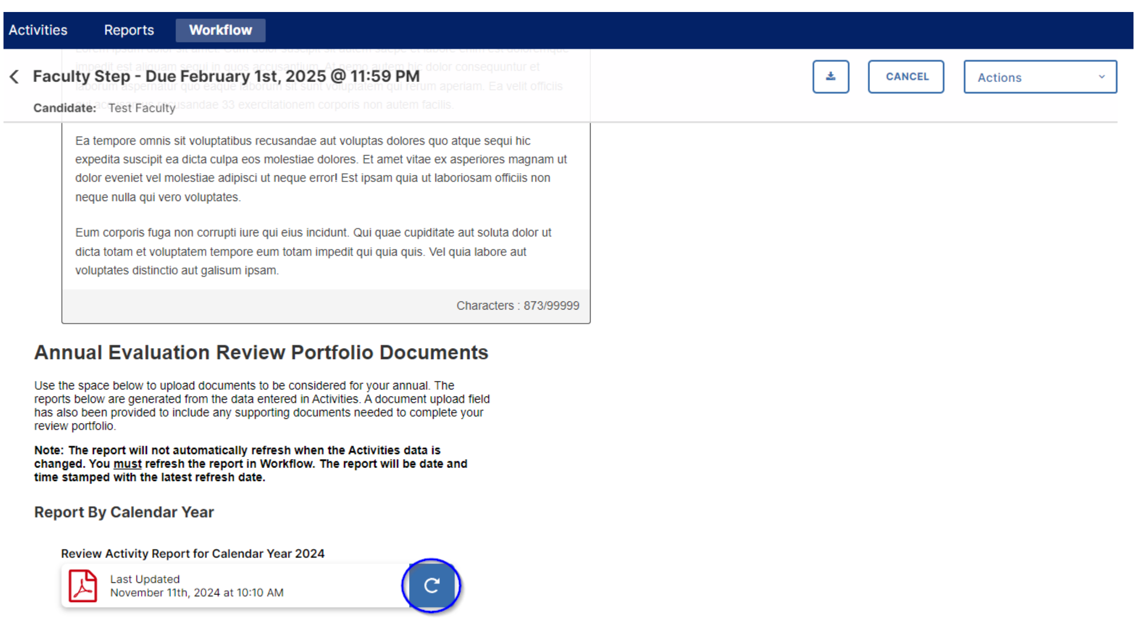
16. The final section of the Faculty Step is the Annual Evaluation Review Portfolio Documents area. This section provides a Review Activity Report generated from your Activities records based upon the calendar year (this report's date range will span from

January 1st until the December 31st of the reviewed year.) This report will not automatically refresh when the Activities data is added or changed. You must refresh the report in Workflow reviews. Each report will be date and time stamped with the latest refresh date.

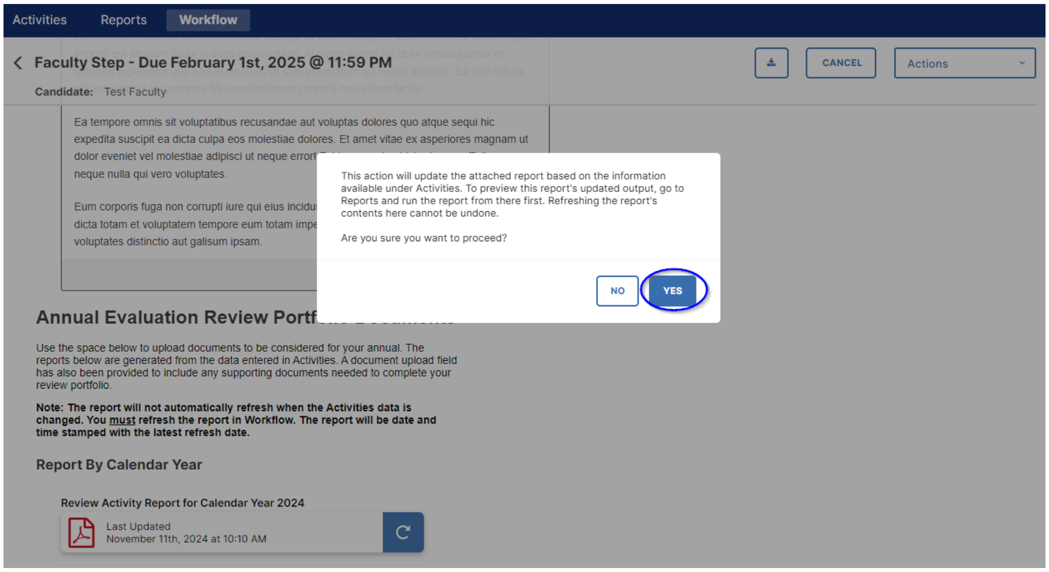
You can click on the Adobe Acrobat icon on the left to view the current Review Activity Report associated with that Academic Year. This will open an additional browser tab to display a PDF version of the report.



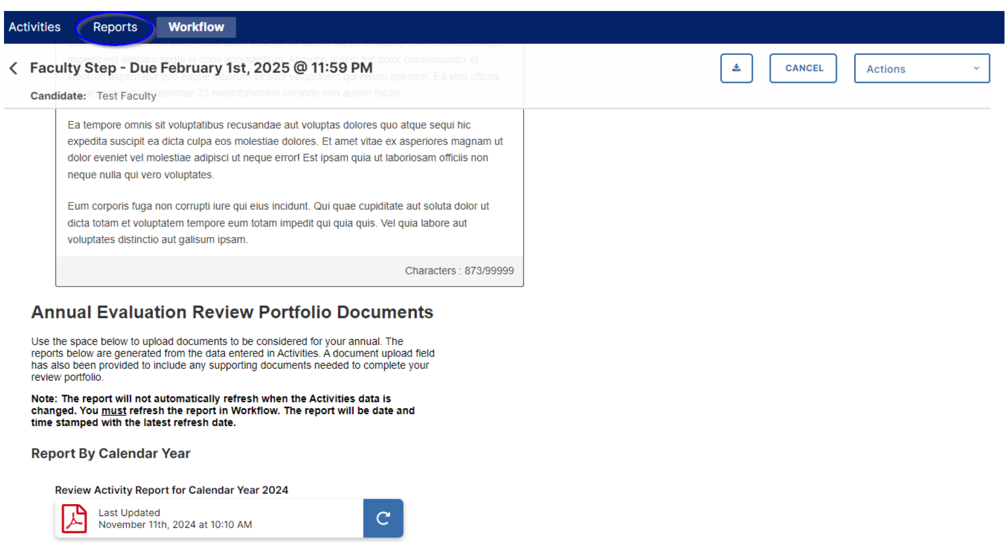
17. If the loaded Review Activity Report is missing entries that have been added to the Activities database since the Last Updated timestamp, click on the Refresh icon on the right of each report to update the report.

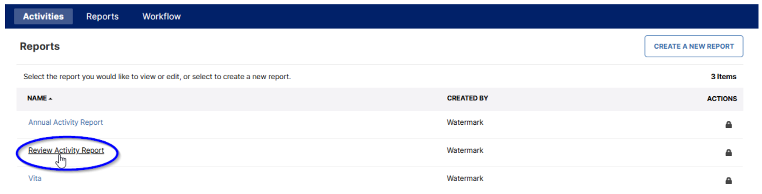


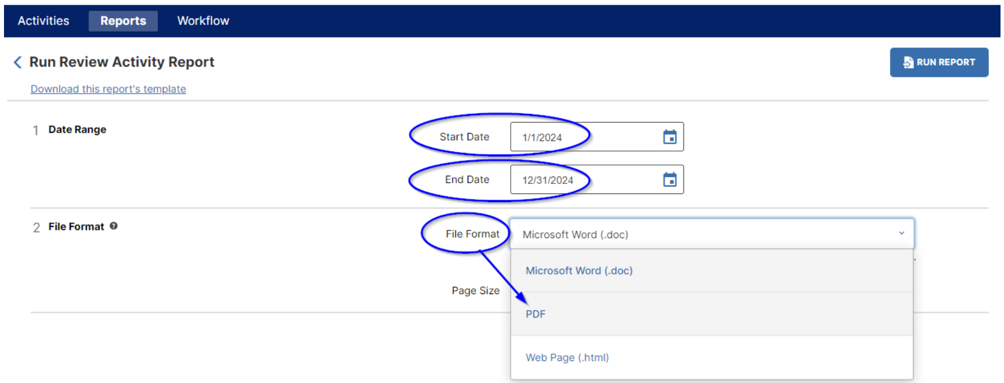
When you click on the Refresh button you will see a popup screen detailing what will happen if you choose yes. The autogenerated report will be updated based on the most current Activities entries, and this cannot be undone.



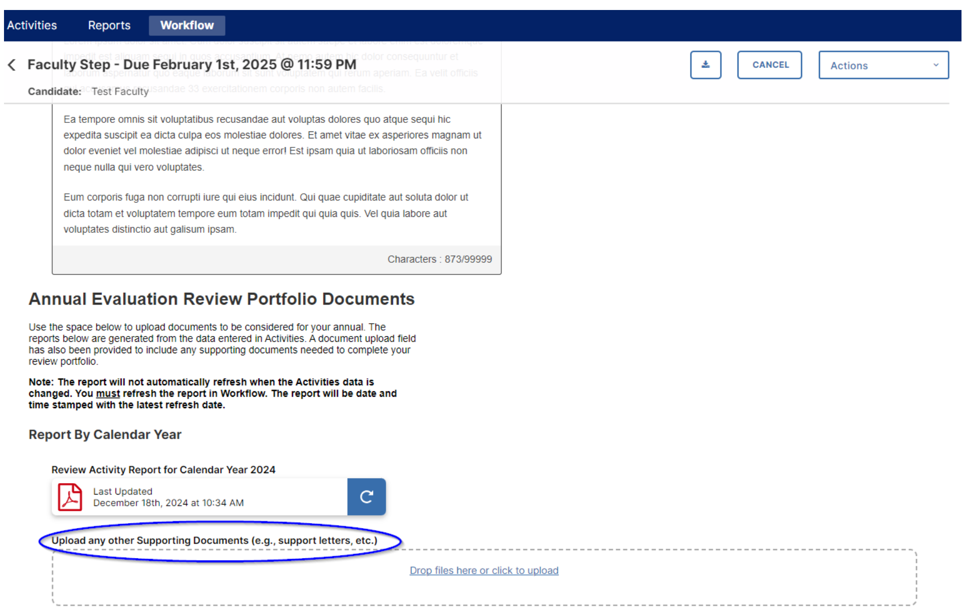
18. You may generate a current copy of a Review Activity Report by going to the Reports Tab and running a report with the same academic year date range being used in your portfolio documents. This will create a report in one of three file formats (MS Word, PDF, or HTML) for you to view before refreshing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

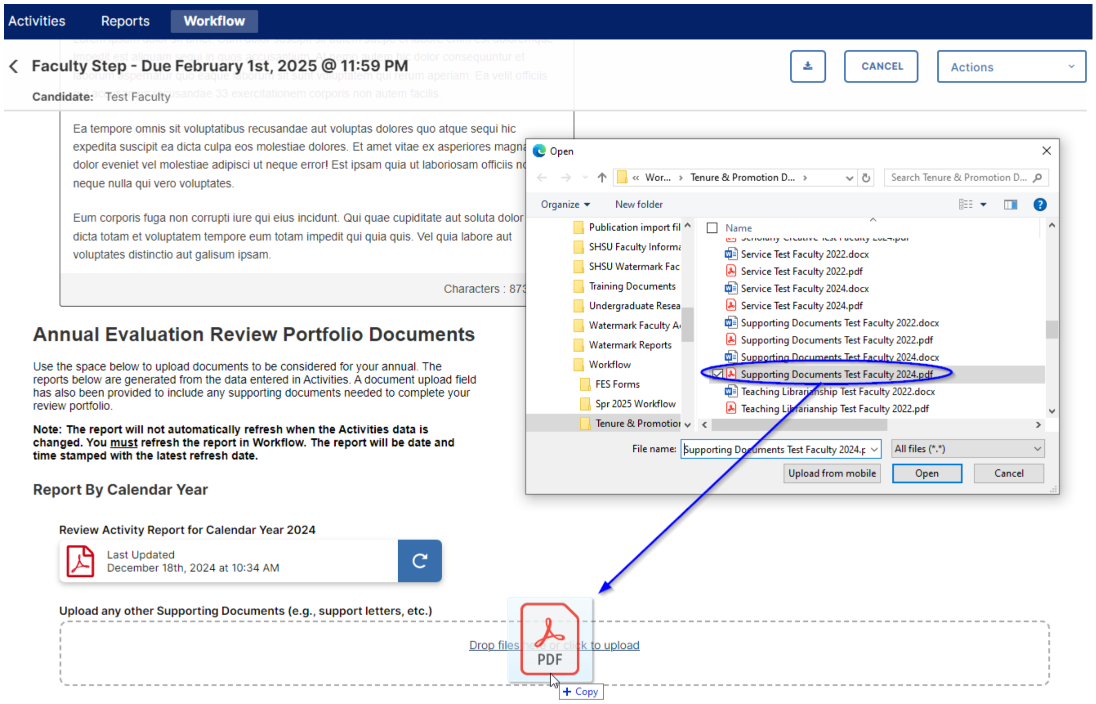






19. In addition to the Review Activity Reports generated from your Activities database entries, there is also an area where you may upload or drag and drop files with any other Supporting Documents for your review portfolio – any file type can be used.

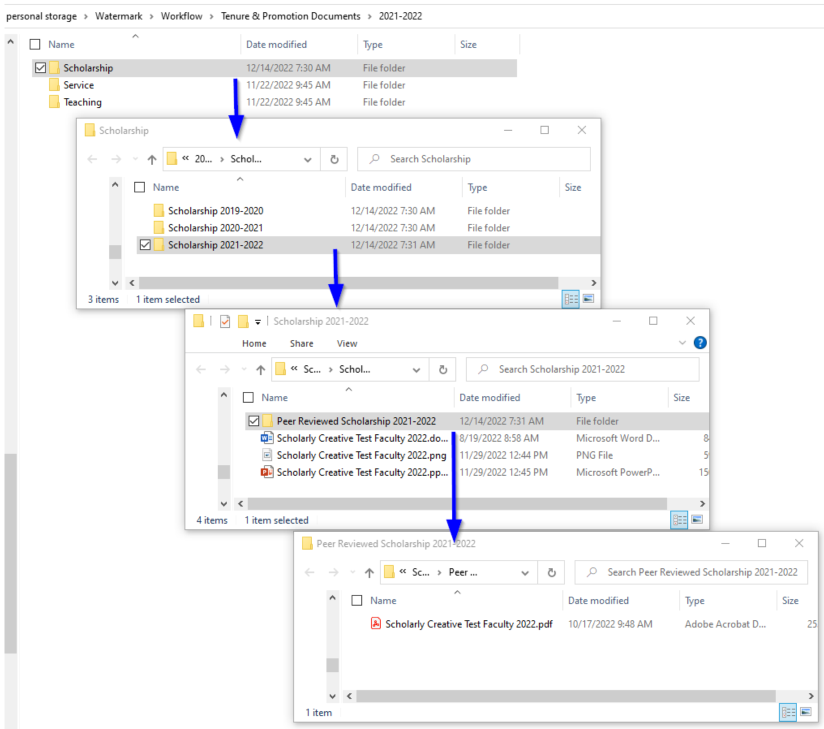


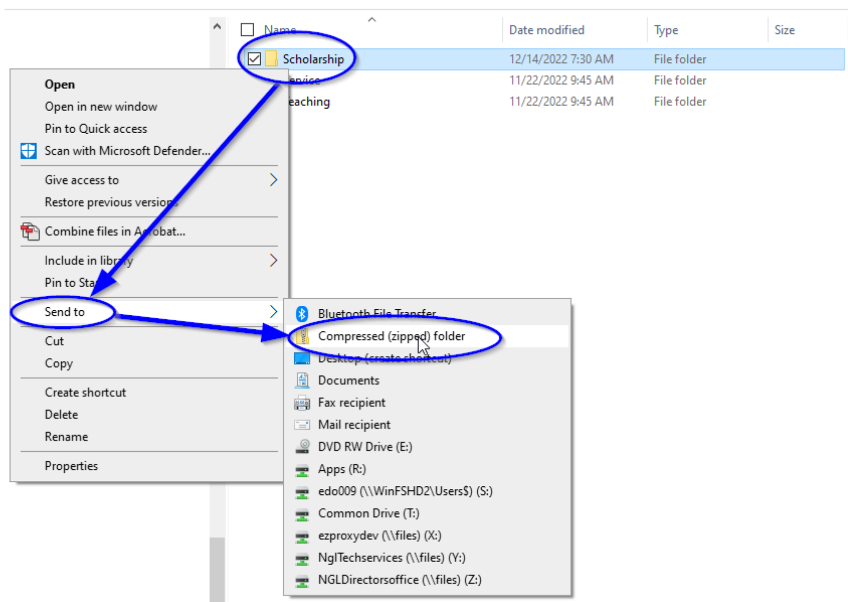


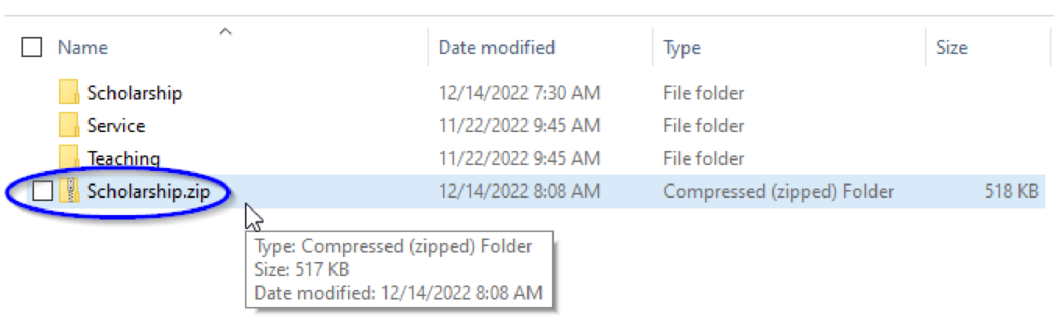
Note: Your materials will be displayed to reviewers exactly as they appear on your faculty submission page. Files uploaded within each of the upload fields will appear in two columns, moving from left to right, then top to bottom.

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

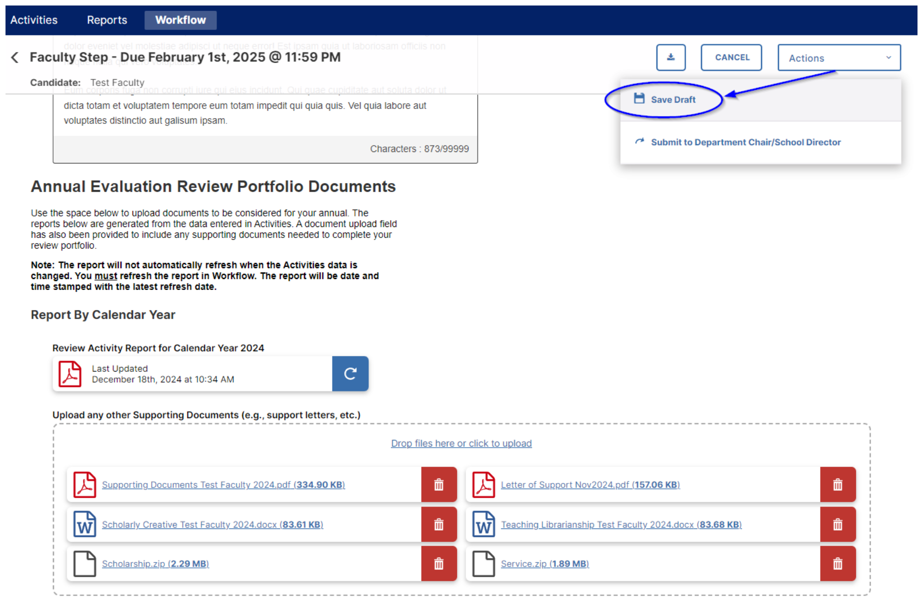
In the following example (on a PC) the Scholarship folder (which for illustration purposes contains 3 levels of subfolders and files,) is being zipped into a single file named Scholarship.zip. That resulting zip file will retain the folder structure when the zip file is subsequently opened.


personal storage › Watermark › Workflow › Tenure & Promotion Documents › 2021-2022
Name
Date modified
Type
Size
Scholarship 12/14/2022 7:30 AM File folder
Service 11/22/2022 9:45 AM File folder
Teaching 11/22/2022 9:45 AM File folder
Scholarship
Search Scholarship
Scholarship 2019-2020 12/14/2022 7:30 AM File folder
Scholarship 2020-2021 12/14/2022 7:30 AM File folder
Scholarship 2021-2022 12/14/2022 7:31 AM File folder
3 items 1 item selected
Scholarship 2021-2022
Home Share View
Search Scholarship 2021-2022
Peer Reviewed Scholarship 2021-2022 12/14/2022 7:31 AM File folder
Scholarly Creative Test Faculty 2022.do... 8/19/2022 8:58 AM Microsoft Word D...
Scholarly Creative Test Faculty 2022.png 11/29/2022 12:44 PM PNG File
Scholarly Creative Test Faculty 2022.pp... 11/29/2022 12:45 PM Microsoft PowerP...
4 items 1 item selected
Peer Reviewed Scholarship 2021-2022
Search Peer Reviewed Scholarship 2021-2022
Scholarly Creative Test Faculty 2022.pdf 10/17/2022 9:48 AM Adobe Acrobat D...
1 item

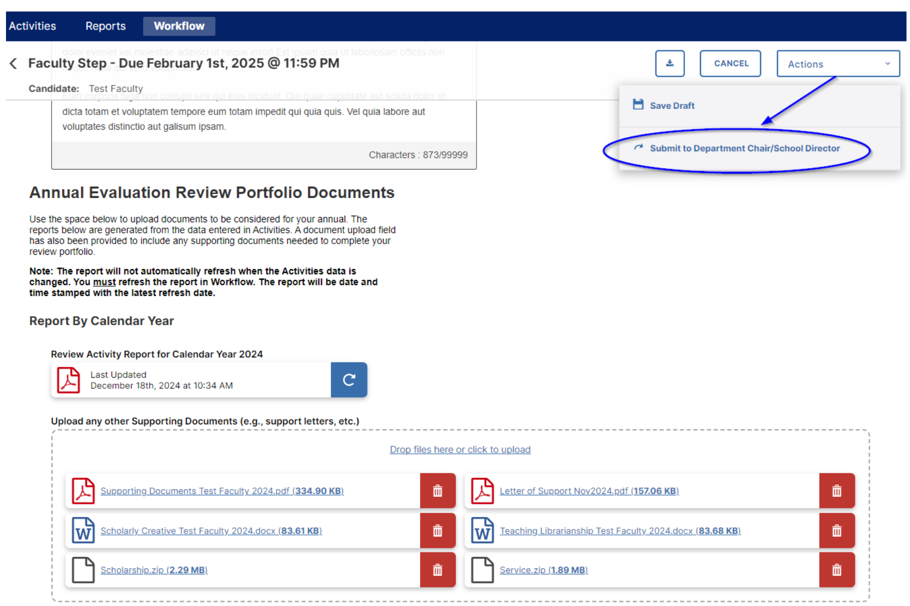

Name
Date modified
Type
Size
Scholarship 12/14/2022 7:30 AM File folder
11/22/2022 9:45 AM File folder
11/22/2022 9:45 AM File folder
Open
Open in new window
Pin to Quick access
Scan with Microsoft Defender...
Give access to
Restore previous versions
Combine files in Acrobat...
Include in library
Pin to Start
Send to
Cut
Copy
Create shortcut
Delete
Rename
Properties
Bluetooth File Transfer
Compressed (zipped) folder
Desktop (create shortcut)
Documents
Fax recipient
Mail recipient
DVD RW Drive (E:)
Apps (R:)
edo009 (\\WinFSHD2\Users$) (S:)
Common Drive (T:)
ezproxydev (\\files) (X:)
NglTechservices (\\files) (Y:)
NGLDirectorsoffice (\\files) (Z:)

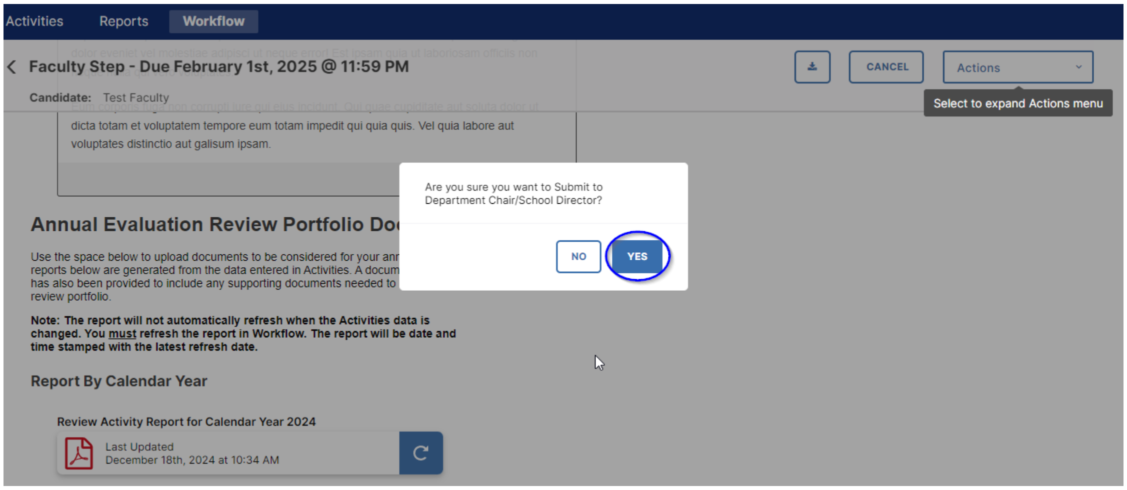

Name
Date modified
Type
Size
Scholarship 12/14/2022 7:30 AM File folder
Service 11/22/2022 9:45 AM File folder
Teaching 11/22/2022 9:45 AM File folder
Scholarship.zip 12/14/2022 8:08 AM Compressed (zipped) Folder 518 KB
Type: Compressed (zipped) Folder
Size: 517 KB
Date modified: 12/14/2022 8:08 AM

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

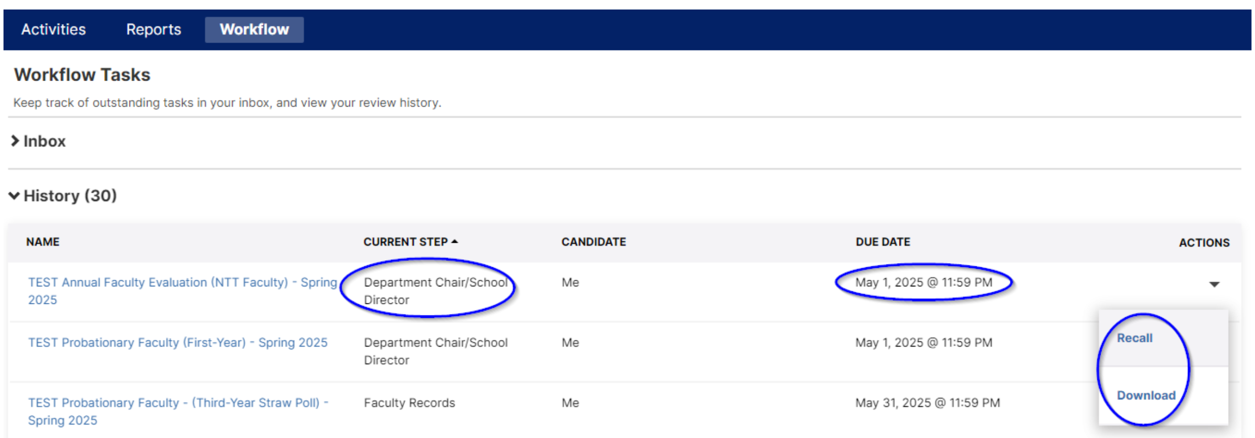


22. Once a faculty member has completed all of their entries and uploads for the Faculty Step, click on the Actions – Submit to Start Portfolio Evaluation and click Yes in the following popup window.





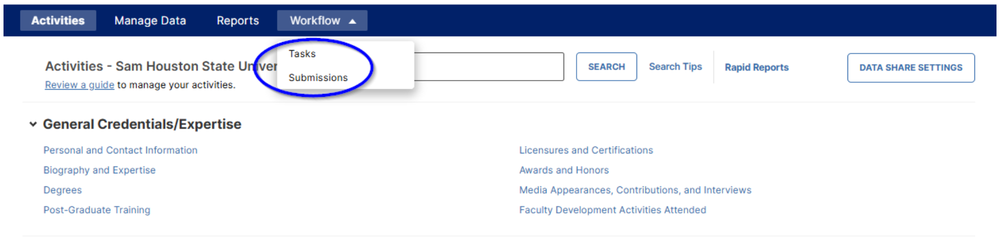
23. The Faculty Workflow Tasks screen will now show the item has moved from the Inbox to History. This screen also shows at what step of the process the submission currently resides. The Due Date shows when the next step must be completed. The Actions down arrow allows the faculty member to Recall or Download the submission. If the due date of the faculty member's submission step has not yet passed, the faculty member may recall the submission to make edits and/or add/remove documents, and then resubmit. Once the Current Step moves multiple steps beyond the user's assigned step the Recall function (while still appearing) will no longer work.



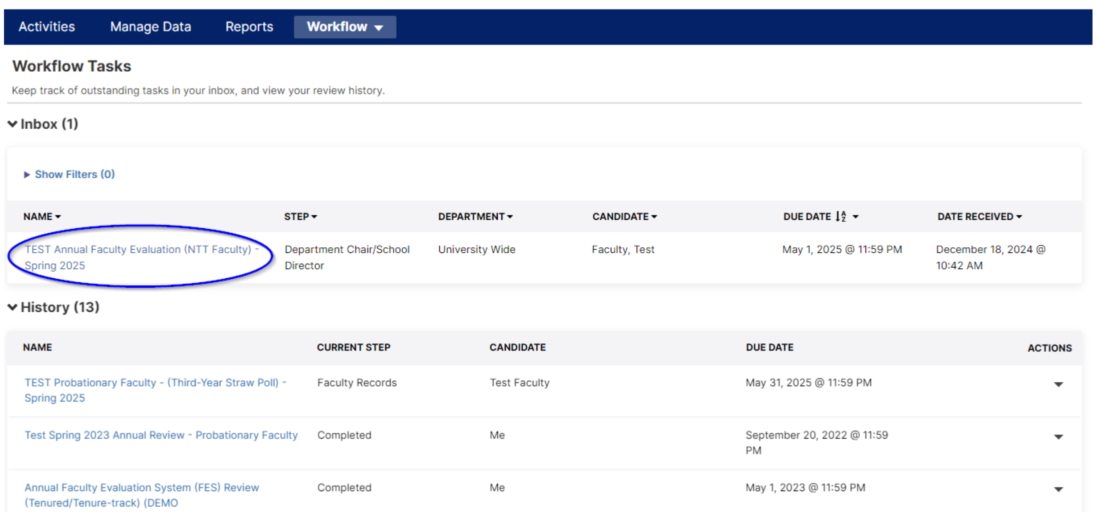
As the portfolio moves through the steps the faculty member can track its progress with the Workflow Tasks History and view any submitted information, they have permission to see from all steps completed prior to the Current Step.

Department Chair/School Director Step

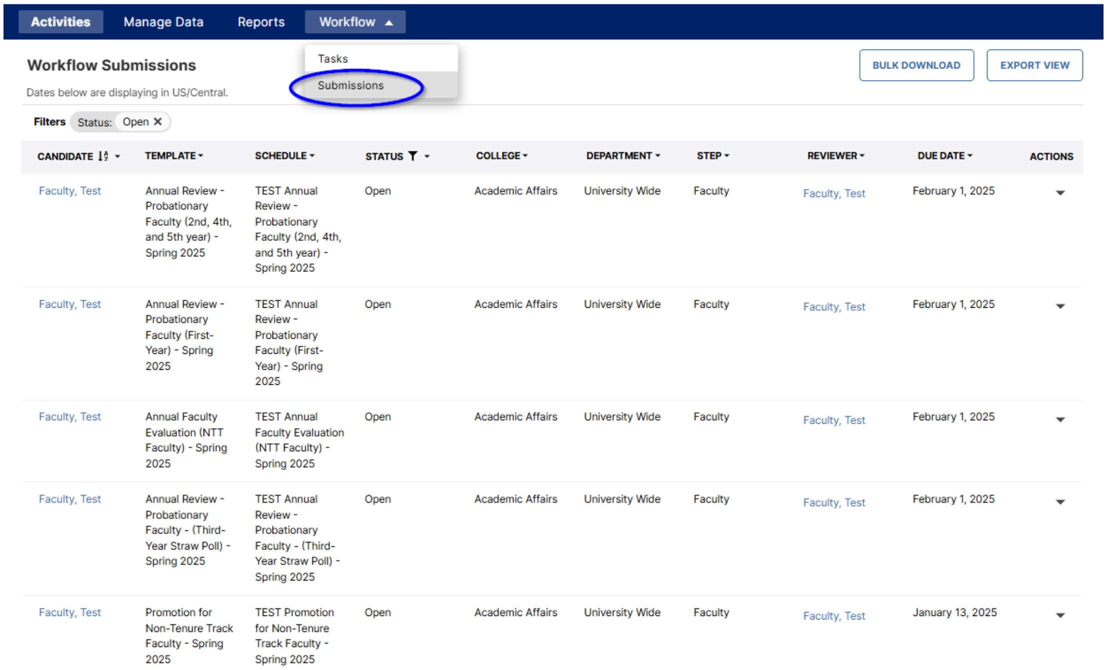
1. The Watermark Navigation bar for Department Chairs/School Directors includes some additional modules that do not appear on faculty accounts. The Workflow tab for a Department Chair/School Director has a drop-down menu with options including Tasks and Submissions.



2. Current review processes waiting for the Department Chair/School Director input and submission, and historical review processes that have already received the Department Chair/School Director submissions are located in the Workflow Tasks. Workflow Tasks Inbox and History will function the same way as Step #1 of Watermark Workflow Tasks on page 4 above. In the Workflow Tasks Inbox, you will see all review processes awaiting your input and submission.

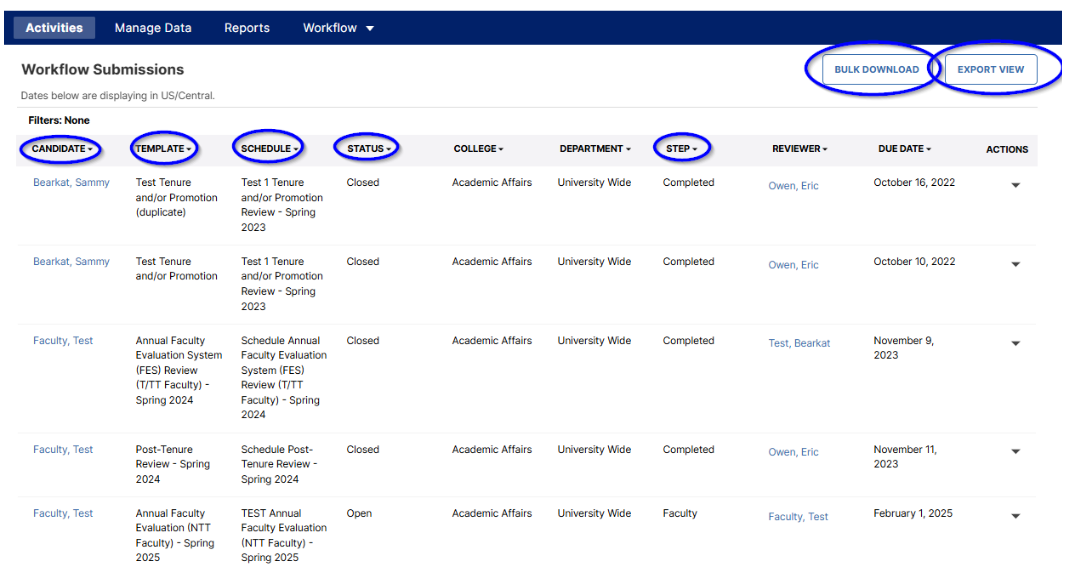


3. The Workflow Submissions option provides View access (under Actions) to current (Open) review processes within their department or school, and additionally a Download option (under Actions) for Closed/Completed reviews. The Submissions screen provides the Department Chair/School Director the ability to monitor the progress of ongoing reviews before they have appeared in their Tasks Inbox.



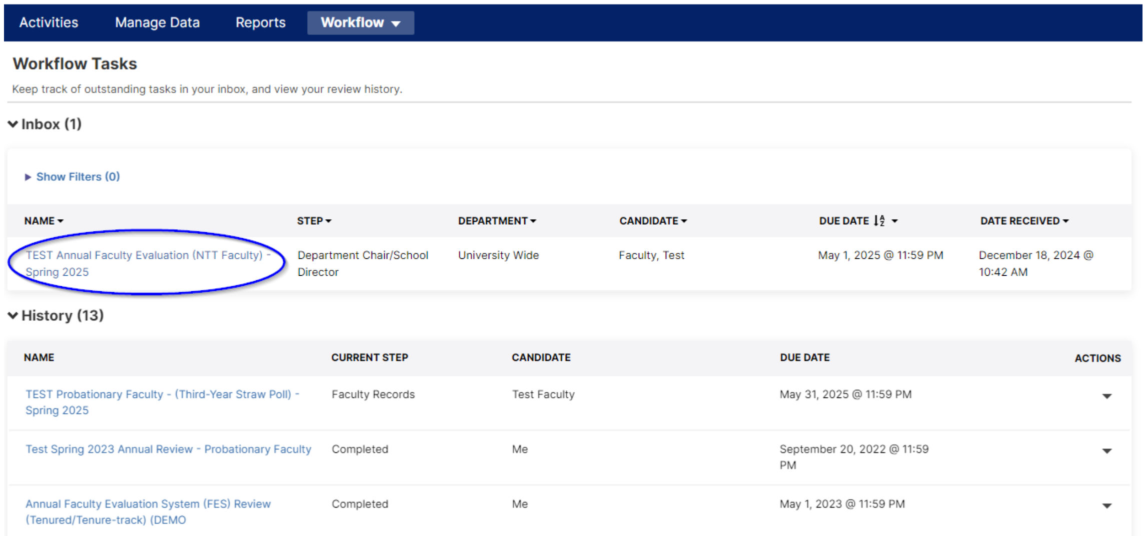
CANDIDATE	TEMPLATE	SCHEDULE	STATUS	COLLEGE	DEPARTMENT	STEP	REVIEWER	DUE DATE	ACTIONS
Faculty, Test	Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	TEST Annual Review - Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	
Faculty, Test	Annual Review - Probationary Faculty (First-Year) - Spring 2025	TEST Annual Review - Probationary Faculty (First-Year) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	
Faculty, Test	Annual Faculty Evaluation (NTT Faculty) - Spring 2025	TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	
Faculty, Test	Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	TEST Annual Review - Probationary Faculty - (Third-Year Straw Poll) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	
Faculty, Test	Promotion for Non-Tenure Track Faculty - Spring 2025	TEST Promotion for Non-Tenure Track Faculty - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	January 13, 2025	

There are options to Export the Submissions Table view as a CSV file, and the Department Chair/School Director can use the filtering options provided by Column headers to narrow the Submissions displayed and run a Bulk Download of all these reviews.

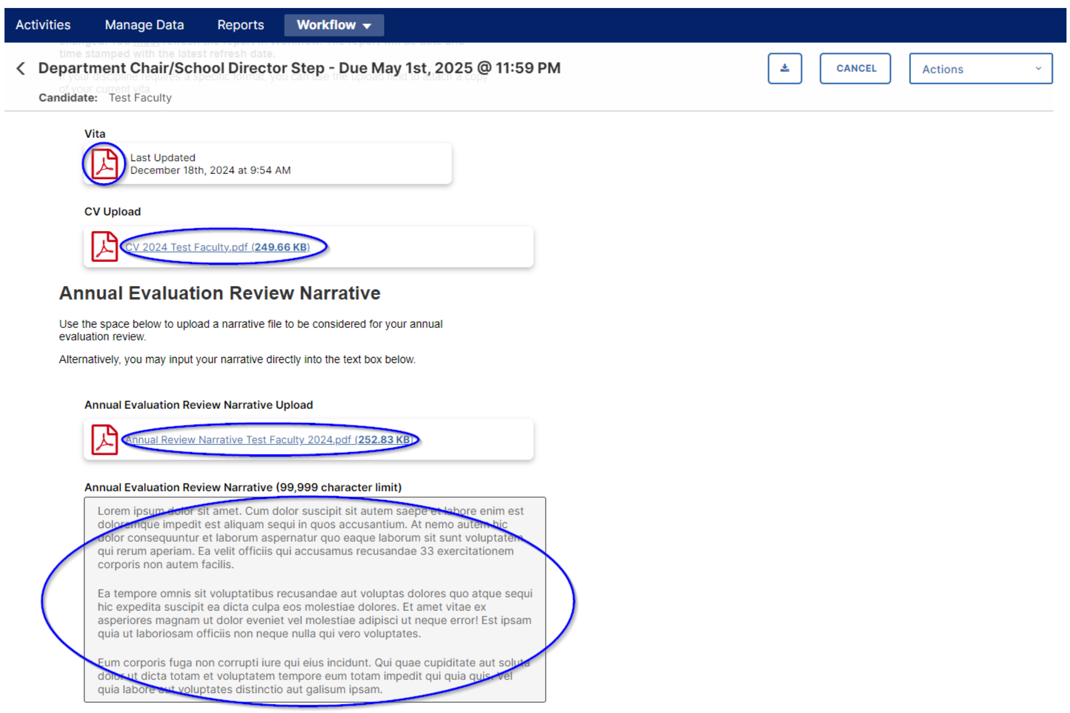


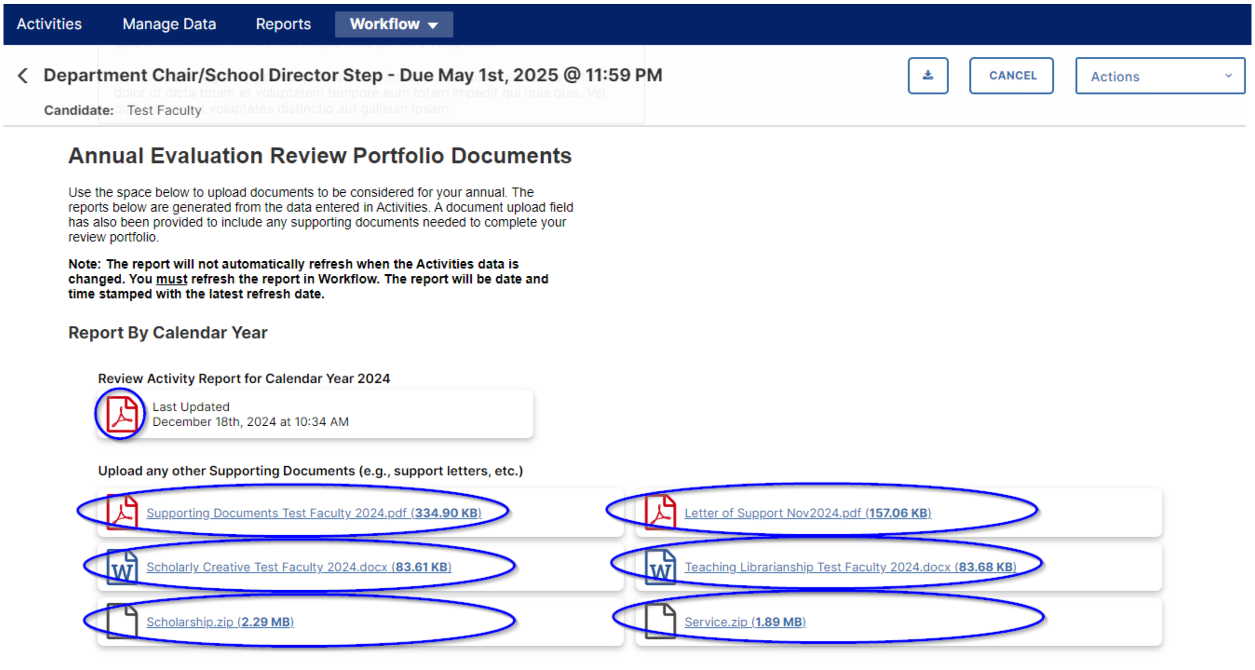
CANDIDATE	TEMPLATE	SCHEDULE	STATUS	COLLEGE	DEPARTMENT	STEP	REVIEWER	DUE DATE	ACTIONS
Bearkat, Sammy	Test Tenure and/or Promotion (duplicate)	Test 1 Tenure and/or Promotion Review - Spring 2023	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	October 16, 2022	
Bearkat, Sammy	Test Tenure and/or Promotion	Test 1 Tenure and/or Promotion Review - Spring 2023	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	October 10, 2022	
Faculty, Test	Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Schedule Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2024	Closed	Academic Affairs	University Wide	Completed	Test, Bearkat	November 9, 2023	
Faculty, Test	Post-Tenure Review - Spring 2024	Schedule Post-Tenure Review - Spring 2024	Closed	Academic Affairs	University Wide	Completed	Owen, Eric	November 11, 2023	
Faculty, Test	Annual Faculty Evaluation (NTT Faculty) - Spring 2025	TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025	Open	Academic Affairs	University Wide	Faculty	Faculty, Test	February 1, 2025	

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

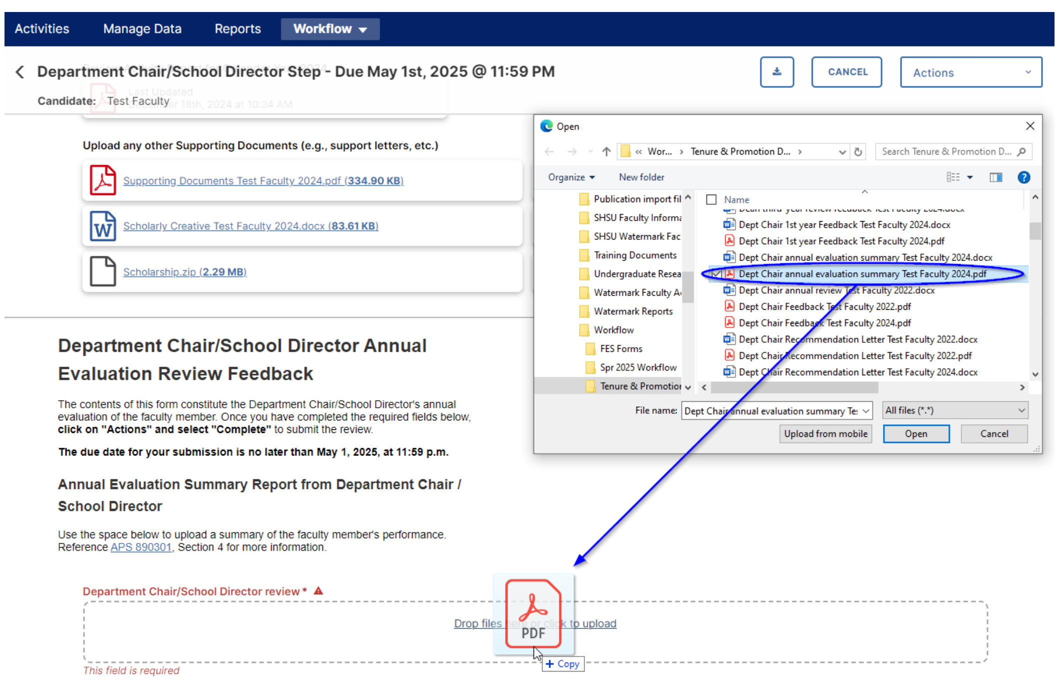


1. In the Department Chair/School Director step, the first section will contain the Faculty's Annual Faculty Evaluation Review Portfolio, with all reports, entries, and links to uploaded files.

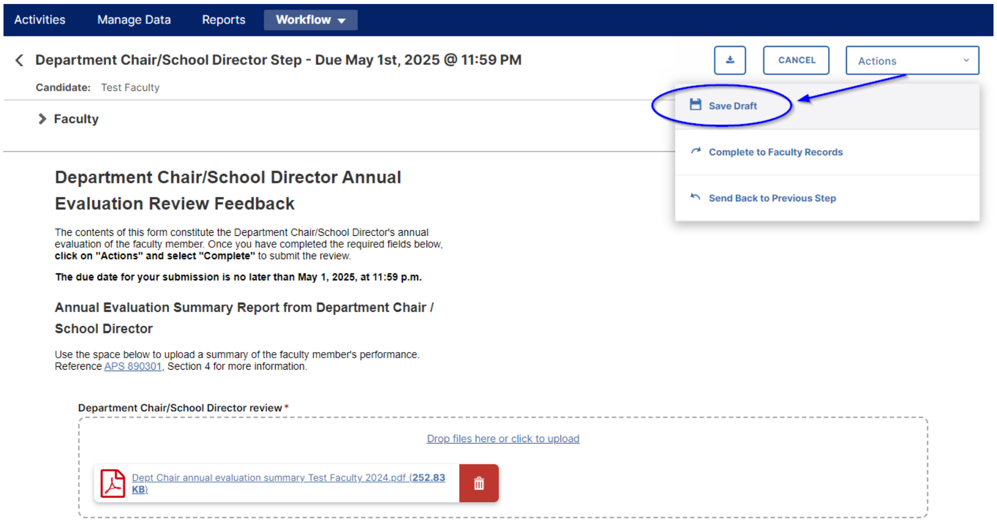




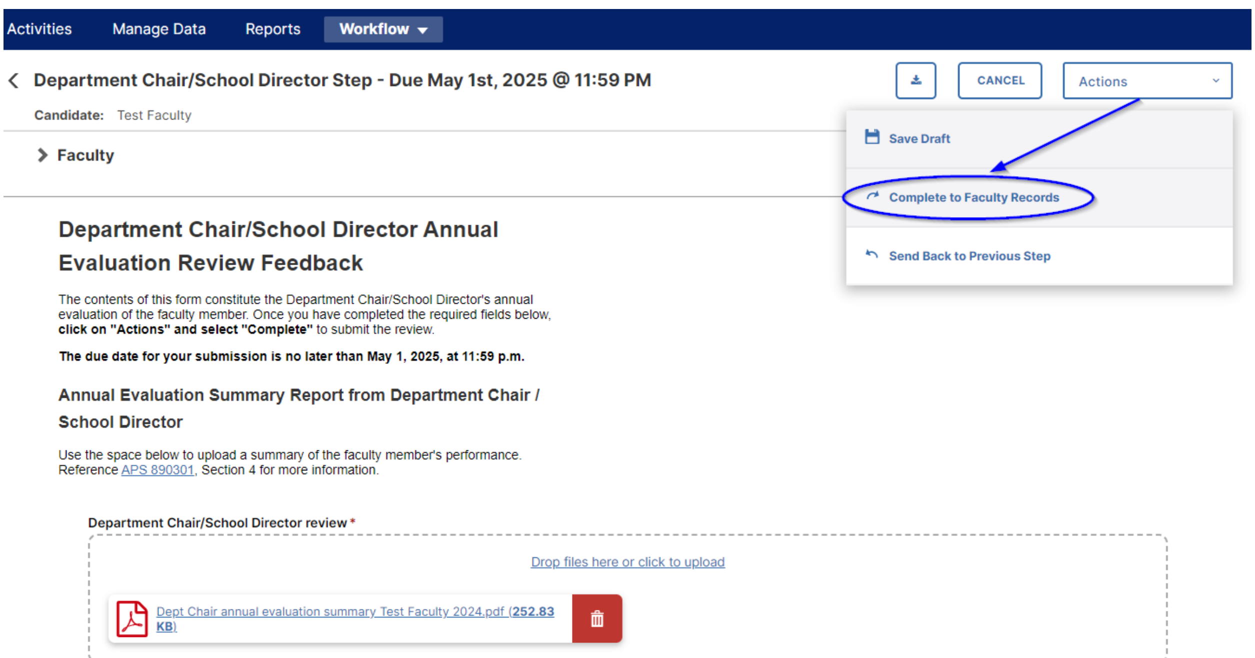
5. The second and final section is the Department Chair/School Director step which contains a Department Chair/School Director review required field for them to upload a document that provides a summary of the faculty member's performance.

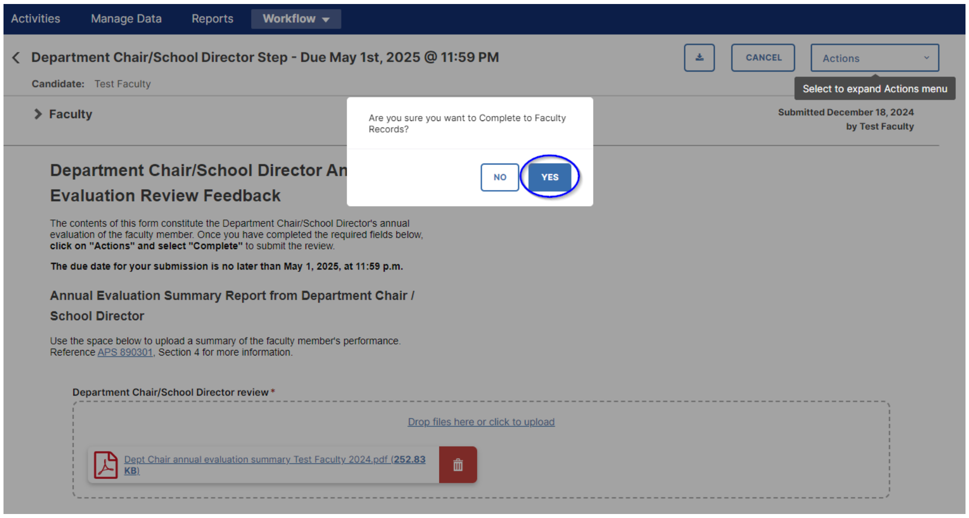


6. Once a Department Chair/School Director has uploaded this file they may choose the Save Draft option from the Actions drop-down menu. This will retain any work for a future session awaiting any additional considerations prior to submission.

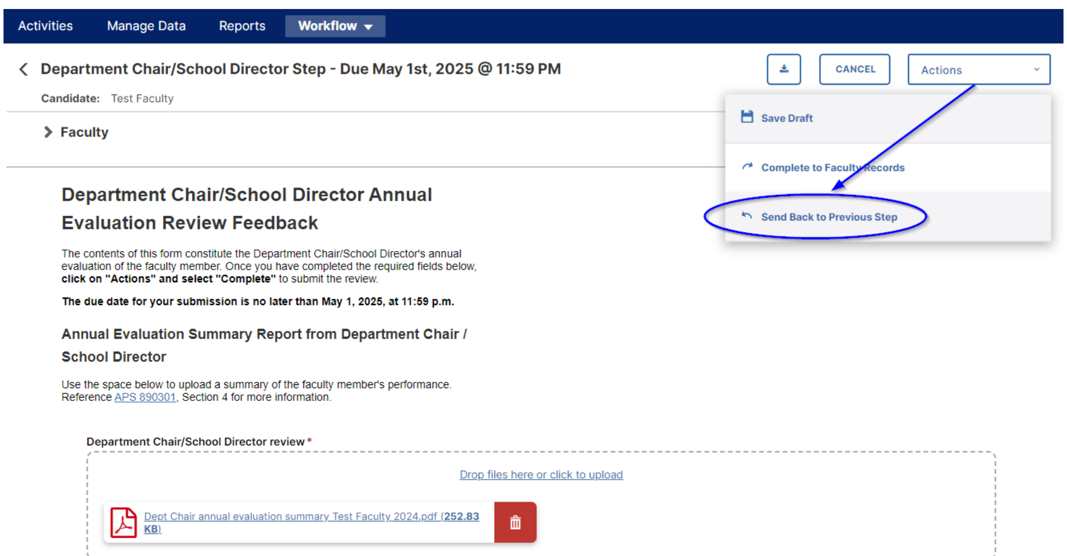


7. Once evaluation is completed, the Department Chair/School Director can select the Complete to Faculty Records option and click Yes on the following popup box. This will complete the Annual Faculty Evaluation System (FES) Review process for this faculty member and move the review to the Faculty Records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

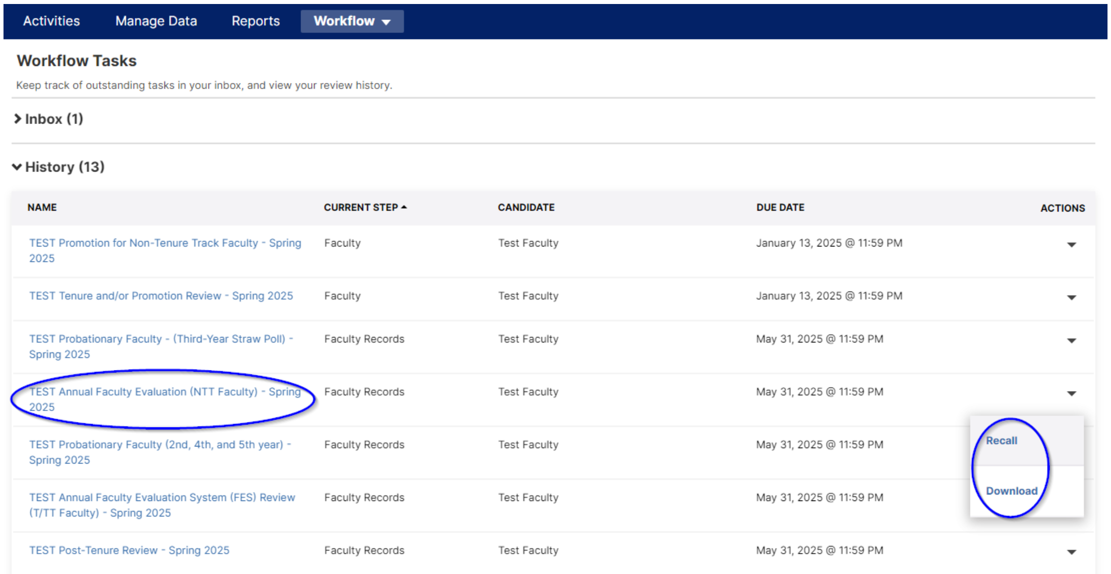




8. There is an option for in later steps of the Workflow process to Send Back to Previous Step from the Actions drop-down menu. This should only be done after consultation with the Faculty Records Office.



9. Once the Department Chair/School Director has completed their submission to Faculty Records, the process will be moved from their Workflow Tasks Inbox to History. The Recall and Download Actions are available – with Recall only taking place prior to the submission due date or following consultation with the Faculty Records Office.


Activities
Manage Data
Reports
Workflow
Workflow Tasks
Keep track of outstanding tasks in your inbox, and view your review history.
Inbox (1)
History (13)
NAME
CURRENT STEP
CANDIDATE
DUE DATE
ACTIONS
TEST Promotion for Non-Tenure Track Faculty - Spring 2025
Faculty
Test Faculty
January 13, 2025 @ 11:59 PM
TEST Tenure and/or Promotion Review - Spring 2025
Faculty
Test Faculty
January 13, 2025 @ 11:59 PM
TEST Probationary Faculty - (Third-Year Straw Poll) - Spring 2025
Faculty Records
Test Faculty
May 31, 2025 @ 11:59 PM
TEST Annual Faculty Evaluation (NTT Faculty) - Spring 2025
Faculty Records
Test Faculty
May 31, 2025 @ 11:59 PM
TEST Probationary Faculty (2nd, 4th, and 5th year) - Spring 2025
Faculty Records
Test Faculty
May 31, 2025 @ 11:59 PM
TEST Annual Faculty Evaluation System (FES) Review (T/TT Faculty) - Spring 2025
Faculty Records
Test Faculty
May 31, 2025 @ 11:59 PM
TEST Post-Tenure Review - Spring 2025
Faculty Records
Test Faculty
May 31, 2025 @ 11:59 PM
Recall
Download