

Reviewing and Contributing to the Tenure and/or Promotion Workflow

The Tenure and/or Promotion Process

The Tenure and/or Promotion Workflow process in Faculty Success adheres to SFA's [Tenure and Continued Employment](#) policy (7.29), as well as those requirements set by the faculty member's college and/or department.

Overview

This electronic process is similar to a linear electronic approval queue. The process advances one step at a time until it has finished, and each step must be completed and submitted manually by the responsible individual in order to move the process forward. Faculty candidates and reviewers receive automated emails from Faculty Success when it is their turn to participate in a workflow step. In most Tenure and/or Promotion templates used by colleges at SFA, there are four steps which must be advanced by the faculty candidate. The remaining steps must be advanced by reviewers.

The faculty candidate who is up for Tenure and/or Promotion begins the process by creating and submitting an electronic portfolio in Faculty Success Workflow. The required materials are attached to the portfolio using prescriptive text and document upload fields, appropriately labeled for each piece of required material. Once the electronic portfolio has been built, the faculty candidate submits it for review.

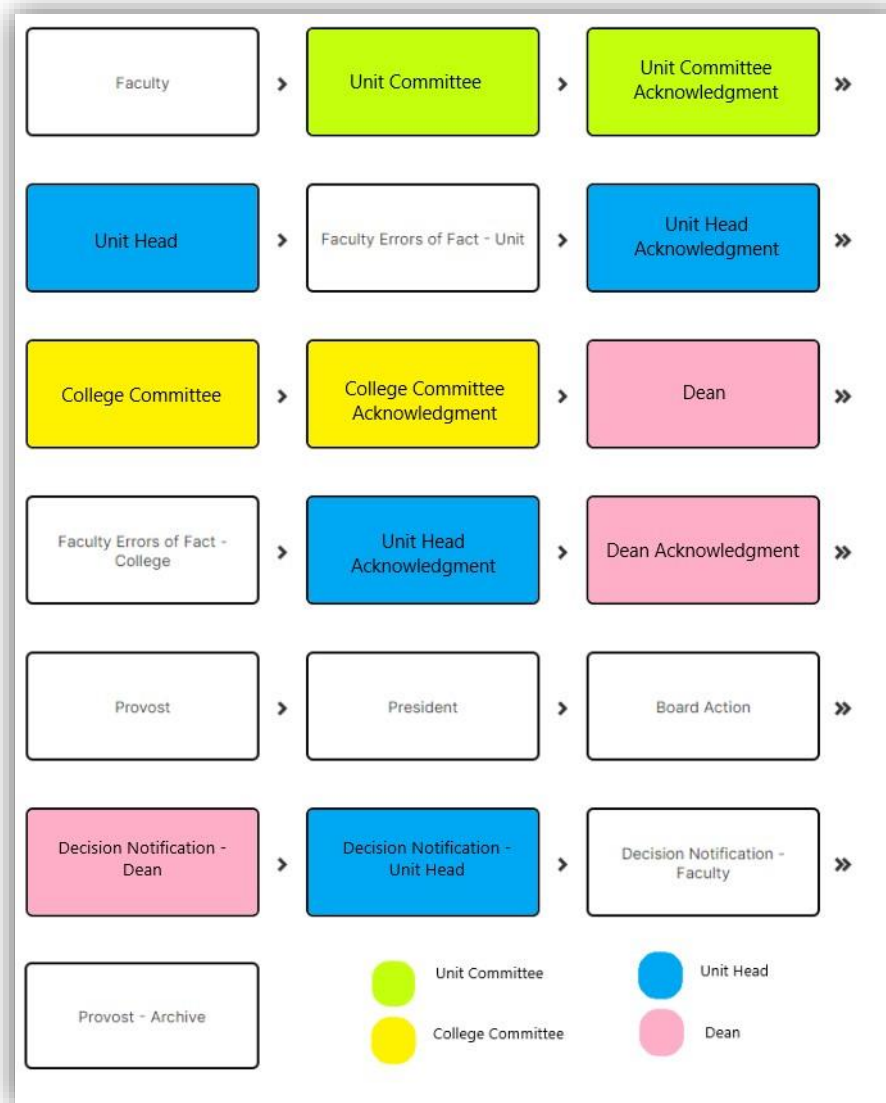
The submitted portfolio is routed through an electronic queue of reviewers, including Academic Unit Heads, Unit Committees, Deans, and College Committees. These reviewers view the faculty candidate's submitted portfolio materials then complete and submit electronic review forms. Review forms allow reviewers to make comments or recommendation decisions which can be seen by subsequent reviewers and the candidate. The candidate will have opportunities to respond to comments or decisions made by reviewers.

Some acknowledgment and response steps are optional, but they must still be advanced manually. Due dates and access links will be provided to the candidate and reviewers via invitation emails from Faculty Success once the workflow launches.

NOTE: More information about accessing Faculty Success, as well as the functionality of each reviewer step, is included below.

Below is an example of a basic template used in the Tenure and/or Promotion process as it is routed through the Faculty Success Workflow. Each step of the Workflow requires an action from someone in order to move the process forward.

The color legend in the image below shows which reviewer (or set of reviewers) is responsible for submitting the step to the next level.



Accessing the Tenure and/or Promotion Materials in Workflow

When the Workflow process launches, tasks are created and await the attention of the faculty who will submit their materials. The faculty member can access these tasks through the email that is generated when the process launches. The invitation email will appear similar to the image below and will be sent from dmworkflow@watermarkinsights.com.

After clicking on the link, users will be prompted to login with their MySFA credentials.

(Note: Faculty Success operates best in the browser Google Chrome.)

From: Faculty Success by Watermark <dmworkflow@watermarkinsights.com>
Reply-To: "no-reply@watermarkinsights.com" <no-reply@watermarkinsights.com>
Date: Monday, October 18, 2021 at 7:50 AM
To: [redacted]
Subject: Morgan Smith - Invitation to Review TEST - College of Ed

Dear [redacted],

The review of the **TEST - College of Ed** for **Morgan Smith** is due on **Wednesday, October 20, 2021 11:59 PM CDT**.

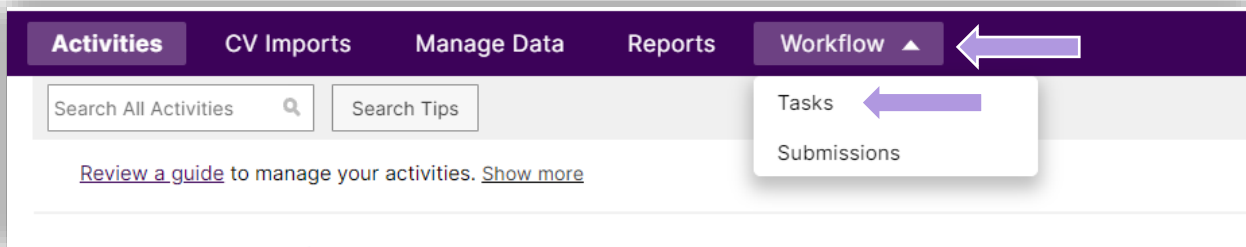
To access your task select the button below.

[Open Now](#)



Your university uses Faculty Success by Watermark to manage this process.
[Learn more about Watermark on our website.](#)

Reviewers may also access their workflow tasks by logging into Faculty Success directly via MySFA (Navigate to the Faculty tab then click “Faculty Success – FAR” under the Faculty Tools heading) and clicking on “Workflow,” then “Tasks” at the top of the screen.

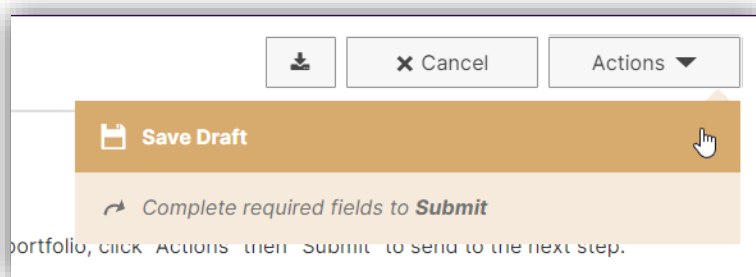


The workflow will show up under “Inbox.” Access the workflow by clicking the text in the name column.

Workflow Tasks				
▼ Inbox				
Name	Step	Subject	Due Date	
TEST - College of Ed	Unit Committee	Morgan Smith	October 19, 2021 @ 11:59 PM	
▼ History				
Name	Current Step	Subject	Due Date	Actions
College of Education 2019	Completed	Me	May 31, 2020 @ 11:59 PM	▼
2018-19 College of Ed	Completed	Me	May 31, 2019 @ 11:59 PM	▼
Annual Faculty Activity Reporting and Administrative Evaluation- College of Education 2020	Completed	Me	May 31, 2021 @ 11:59 PM	▼

Reviewing Faculty Submissions

Once Reviewers access their tasks in Workflow, they can review the materials submitted by candidates and contribute to the submissions. Workflow includes the option to save progress and finish the submission later. To save progress, click “Actions” in the upper right-hand corner, then click “Save Draft”. Reviewers will be able to pick up where they left off when they log back in.



NOTE: Faculty and Reviewers should save their progress frequently while working in Faculty Success Workflow. Faculty Success times out after a few minutes, and it is possible any unsaved work could be lost.

Since the Faculty Step of the Tenure and/or Promotion Workflow was designed to take the place of the traditional paper tenure/promotion portfolio, faculty are required to provide many pieces of information in the Faculty Form before submitting. Faculty add this information in the digital portfolio through the use of several types of data fields including Text Fields, Drop-down Menus, File Upload Fields, and Embedded Reports. Files and narratives are displayed seamlessly in the workflow as one continuous webpage.

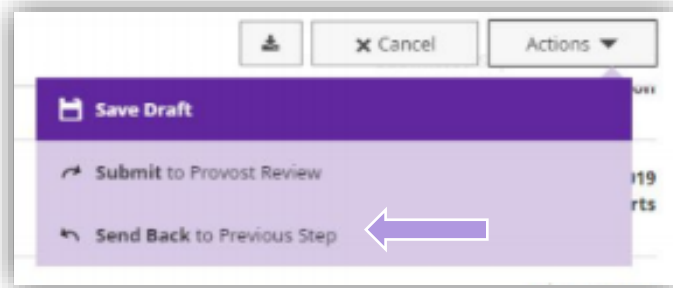
Notes Regarding Faculty Form Contents

1. The Course Evaluations Report generated by Faculty Success directs reviewers to the candidate’s course evaluation results in SurveyDig for the review year. Only users with the appropriate SurveyDig access may view the course evaluations. Reviewers should click the Adobe icon to view the Course Evaluations Report and access course evaluations. If the link in the report is

www.sfasu.edu, no course evaluations are available, because the faculty member was not assigned to teach any courses.

2. Text fields contain narratives, notes, and contextual information submitted by faculty.
3. The file upload feature may be used by faculty to attach supporting documents. Reviewers may click on the file names to view.

If a faculty submission is incomplete or requires correction, a reviewer may send it back for correction. To do this, click “Actions” in the upper right corner of the screen, then choose “Send Back to Previous Step”. Include comments explaining why the submission was sent back.



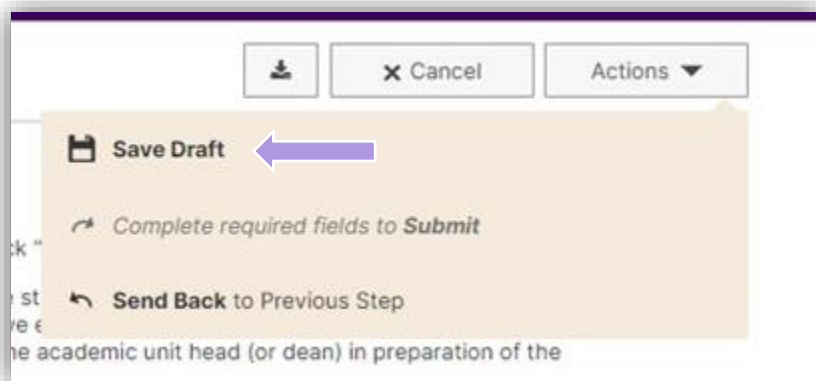
Contributing to a Submission

After reviewing the faculty submission and formulating their thoughts, reviewers can complete the available forms. Examples of these forms are shown below, grouped by reviewer (or set of reviewers).

The Actions Button

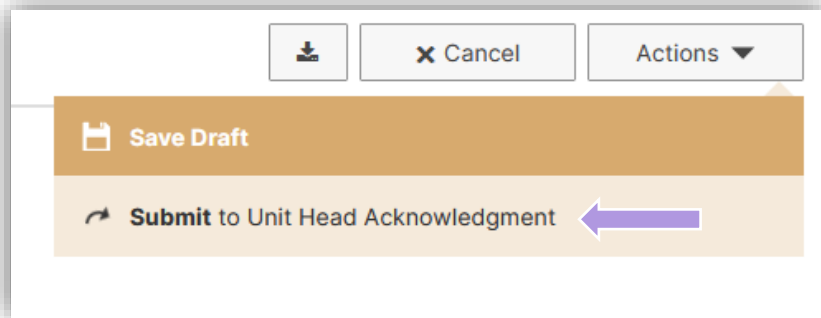
The Actions Button has many different dynamic functions and is very important to the Workflow process.

After making changes to a form, reviewers can use the Actions button to save a draft of their work up to this point. Click “Save Draft” in the Actions drop-down menu.

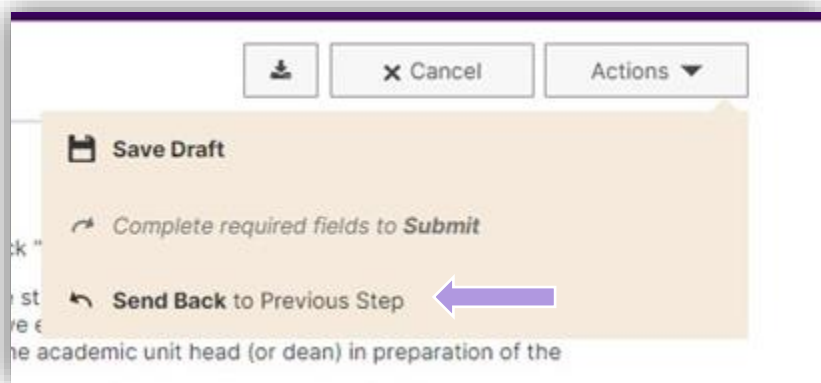


If there are required fields in the current step which still need to be completed, the Submit option will not be visible. After all required fields have been completed, this option in the Actions menu will change dynamically to display a variation of “Submit to [Next Step].”

When a form has been completed and is ready to be submitted, click “Submit to [Next Step]” in the Actions menu to advance the flow.



For reviewer forms, there will also a “Send Back to Previous Step” option as mentioned above. This may be used to send the previous step back to its advancer for corrections or timing issues.



Unit Committee and College Committee

Each committee has multiple committee members and one committee chair.

1. All committee members and the chair review the faculty member’s materials.
2. Each committee member completes the committee member form.
3. Once all committee members have completed the form, the committee chair completes the committee chair form and submits the form to the next step.
 - **NOTE:** The committee chair can see which committee members have already responded when they log in to Faculty Success and open the Workflow; **please wait until all committee members have responded before completing and submitting the Committee Chair Form.**

- The final question of the Committee Chair Form reads “Recommend this faculty member?” and the response should be generally representative of the opinions of the entire committee. **NOTE:** The committee chair may view committee members’ form responses, but committee members may not view one another’s responses.

• Recommend this faculty member? Yes No

Committee Chair **Committee Member**

Enable member visibility? Yes

Comments - Teaching Effectiveness

• Teaching Effectiveness Rating Excellent Satisfactory Unsatisfactory

Comments - Research/Scholarly/Creative Accomplishments

• Research/Scholarly/Creative Accomplishments Rating Excellent Satisfactory Unsatisfactory

Comments - Service

• Service Rating Excellent Satisfactory Unsatisfactory

Comments - Overall

• Recommend this faculty member? Yes No

After each committee chair submits the group’s decision, committee members will have the opportunity to review and acknowledge the submitted decision in the “... Committee Acknowledgment Form.”

1. Each committee member reviews the submitted decision and completes the Committee Member acknowledgment form.

The screenshot shows a form for a single committee member. At the top, there is a red asterisk and the text: "I have had the opportunity to review the committee's decision on this faculty member's Tenure and/or Promotion application, as it will be submitted to the dean." Below this text is a horizontal line with two radio buttons. The left radio button is labeled "Yes" and is selected. The right radio button is labeled "No" and is not selected. Below the radio buttons is a section labeled "Comments (Optional)". This section contains a rich text editor with a toolbar featuring icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Undo, Redo, and Source Code. The text area below the toolbar is empty.

2. After all committee members have completed their acknowledgment forms, the committee chair reviews any comments.
3. The committee chair completes the Committee Chair acknowledgment form and submits the Workflow to the next step.

The screenshot shows a form for all committee members. At the top, there is a red asterisk and the text: "All committee members have had the opportunity to review the committee's decision on this faculty member's Tenure and/or Promotion application." Below this text is a horizontal line with two radio buttons. The left radio button is labeled "Yes" and is selected. The right radio button is labeled "No" and is not selected. Below the radio buttons is a section labeled "Comments (Optional)". This section contains a rich text editor with a toolbar featuring icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Undo, Redo, and Source Code. The text area below the toolbar is empty.

If committee members and the committee chair find there is a problem with the decision submitted, the committee chair can recall the submission.

As long as the submission is on the immediate next step (“... Committee Acknowledgment Form”), the committee chair can "recall" the submission, essentially pulling it back to the initial committee step to allow for correcting errors in the decision submission.

To do so, the committee chair must navigate to the Workflow Tasks page. In the “History” section, find the record for the appropriate Workflow. In the “Actions” column, click the black arrow and select “Recall.” This will bring the submission back for the committee to make changes to their decision.

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Faculty Success | formerly Digital Measures

Activities CV Imports Manage Data Reports Workflow

Workflow Tasks

▼ Inbox

Name	Step	Subject	Due Date
No Data to Display			

▼ History

Name	Current Step	Subject	Due Date	Actions
TEST - College of Ed	Unit Committee	Me	October 19, 2021 @ 11:59 PM	
Report Refresh Test	Completed	Me	June 27, 2021 @ 11:59 PM	<ul style="list-style-type: none"> Recall Download

Unit Head

Unit Heads are responsible for completing and advancing three forms in the Tenure and/or Promotion Workflow.

1. After the Unit Head reviews the faculty member's materials, they must complete the initial response form below. All rating radial buttons are required, while comments for each section are optional. Upon completing this form, click "Actions," then click "Submit to [Next Step]."

Unit Head Form Cancel Apply

Comments - Teaching Effectiveness

B I U [Rich Text Editor Icons]

Teaching Effectiveness Rating Excellent Satisfactory Unsatisfactory

Comments - Research/Scholarly/Creative Accomplishments

B I U [Rich Text Editor Icons]

Research/Scholarly/Creative Accomplishments Rating Excellent Satisfactory Unsatisfactory

Comments - Service

B I U [Rich Text Editor Icons]

Service Rating Excellent Satisfactory Unsatisfactory

Comments - Overall

B I U [Rich Text Editor Icons]

Recommend this faculty member? Yes No

- Once the Faculty has had the opportunity to review the Unit Head's response, the Faculty may respond with Errors of Fact. The Unit Head Acknowledgment Form allows the unit head to respond to the faculty's comments and acknowledge receipt of said comments. The acknowledgment radial button is required, but the comment is optional. Upon completing this form, click "Actions," then click "Submit to [Next Step]."

< Unit Head Acknowledgment Form Cancel Apply

Use this form to acknowledge your receipt of any remarks by the candidate regarding errors of fact and make comments.

I acknowledge that I have received the candidate's remarks.
 Yes
 No

Comments

B I U

Once this step has been completed, click the "Actions" button and select "Submit."

- Once a decision is made regarding the faculty member's tenure and/or promotion, and the decision has been approved by the provost, president, and board, the reviewers and faculty receive an official decision notification via the Faculty Success Workflow. Make any desired comments in the text field, then select the "Yes" radial button to verify that the decision notification has been received. Upon completing this form, click "Actions," then click "Submit to [Next Step]."

< Decision Notification - Unit Head Form Cancel Apply

Comments

B I U

I have been notified of the reviewers' decision on the faculty member's Tenure and/or Promotion portfolio.
 Yes
 No

Dean

- After the Dean reviews the faculty member's materials, they must complete the initial response form below. All rating radial buttons are required, while comments for each section are optional. Upon completing this form, click "Actions," then click "Submit to [Next Step]."

< Dean Form Cancel Apply

Comments - Teaching Effectiveness

• Teaching Effectiveness Rating

Comments - Research/Scholarly/Creative Accomplishments

• Research/Scholarly/Creative Accomplishments Rating

Comments - Service

• Service Rating

Comments - Overall

• Recommend this faculty member?

Once this step has been completed, click the "Actions" button and select "Submit."

2. Once the Faculty has had the opportunity to review the Dean’s response, the Faculty may respond with Errors of Fact. The Dean Acknowledgment Form allows the dean to respond to the faculty’s comments and acknowledge receipt of said comments. The acknowledgment radial button is required, but the comment is optional. Upon completing this form, click “Actions,” then click

“Submit to [Next Step].”

The screenshot shows a web form titled "Dean Acknowledgment Form". At the top right are "Cancel" and "Apply" buttons. Below the title is a instruction: "Use this form to acknowledge your receipt of any remarks by the candidate regarding errors of fact and make comments." The main content area contains a question: "I acknowledge that I have received the candidate's remarks." followed by two radio buttons labeled "Yes" and "No". Below this is a "Comments" section with a rich text editor toolbar (including Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Undo, Redo, Clear, and Source) and a large text input area. At the bottom, a note reads: "Once this step has been completed, click the 'Actions' button and select 'Submit.'"

3. Once a decision is made regarding the faculty member’s tenure and/or promotion, and the decision has been approved by the provost, president, and board, the reviewers and faculty receive an official decision notification via the Faculty Success Workflow. Make any desired comments in the text field, then select the “Yes” radial button to verify that the decision notification has been received. Upon completing this form, click “Actions,” then click “Submit to [Next Step].”

The screenshot shows a web form titled "Decision Notification - Dean Form". At the top right are "Cancel" and "Apply" buttons. Below the title is a "Comments" section with a rich text editor toolbar (including Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Table, Undo, Redo, Clear, and Source) and a large text input area. Below this is a question: "I have been notified of the reviewers' decision on the faculty member's Tenure and/or Promotion portfolio." followed by two radio buttons labeled "Yes" and "No".

Prior to submitting, workflow responses and materials may be saved (to finish the submission later) or downloaded for archival purposes by clicking the icons in the upper right corner of the screen. **(Note:** Users may only view and save those forms they are able to see while the Workflow is in process.)

Final Steps

After reviewers have routed the submission to the next step in the process, the task will move from the Inbox to the History section of the Workflow tasks screen. Here, faculty or reviewers can check the status of the submission, review the content of the submission, and view the fields completed by reviewers in

subsequent steps.

The contents of the submission can also be exported for archival purposes by clicking the “download” button. This will download a .zip file containing the following:

- An HTML file that replicates how a user would see the submission via the user interface
- A sub-folder for each step that contains reports or file attachments, with those files contained within the sub-folder
- "Fonts" and "CSS" folders. These can be disregarded, as they simply ensure that the HTML file renders properly.

The download option appears in various places:

- When viewing a submission via the Inbox
- When viewing a submission via the History table
- Via the "Actions" column in the History table

Once the last step of a submission has been completed, that submission will be removed from the History table for reviewers, but it will remain available to the faculty participant for future reference. However, reviewers can view the submission in the Submissions table.

Additionally, once the Workflow has been completed, it will be archived in the Provost’s Office.

If you have questions or experience a problem please contact:

Office of Institutional Research

936-468-3806

sfa_ir@sfasu.edu