

Submitting Tenure and/or Promotion Materials with Faculty Success 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 your 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.

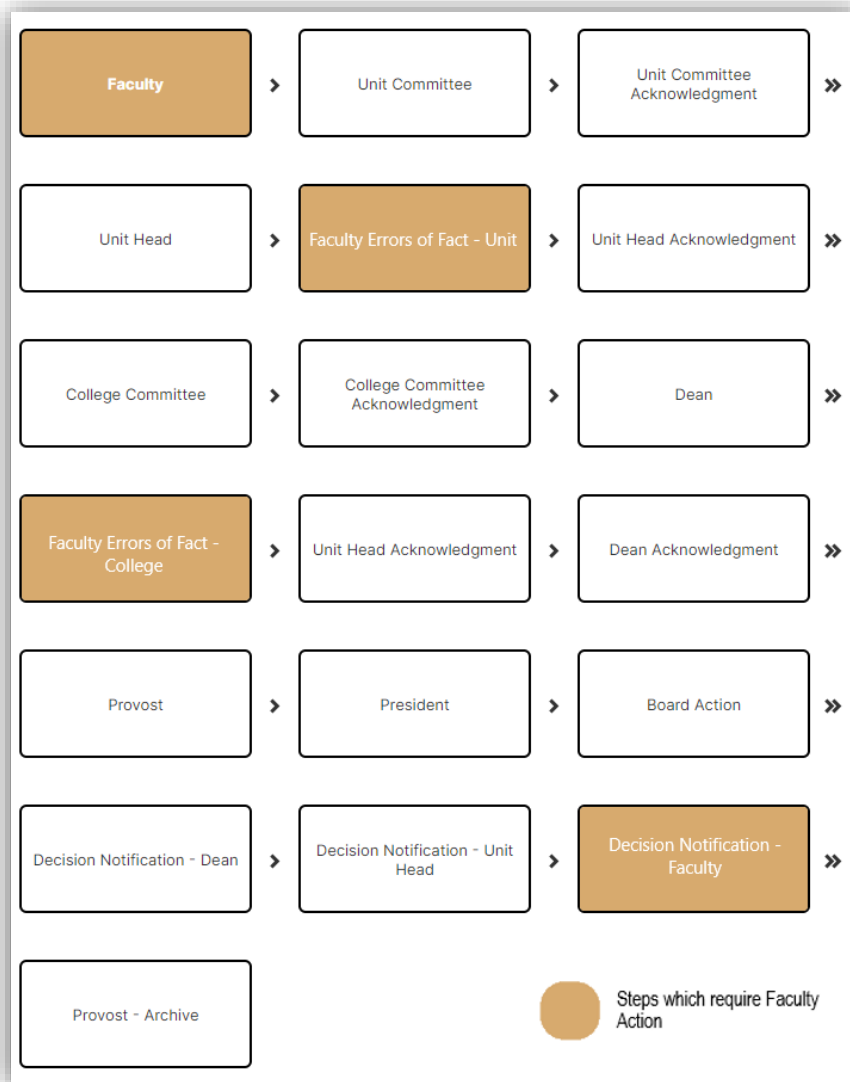
The faculty candidate who is up for Tenure and/or Promotion begins the process by creating and submitting an electronic portfolio in Faculty Success Workflow. The required materials are attached to the portfolio using prescriptive text and document upload fields, appropriately labeled for each piece of required material. Once the electronic portfolio has been built, the faculty candidate must submit it for review. Due dates and access links will be provided to the candidate via invitation emails from Faculty Success once the workflow launches.

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. These response steps (sometimes called "Faculty Error of Fact" steps) are optional, but the candidate must advance the workflow by submitting the step.

NOTE: More information about accessing Faculty Success, as well as the functionality of each candidate 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 orange steps in the image below require action from the faculty member who is up for Tenure and/or Promotion.

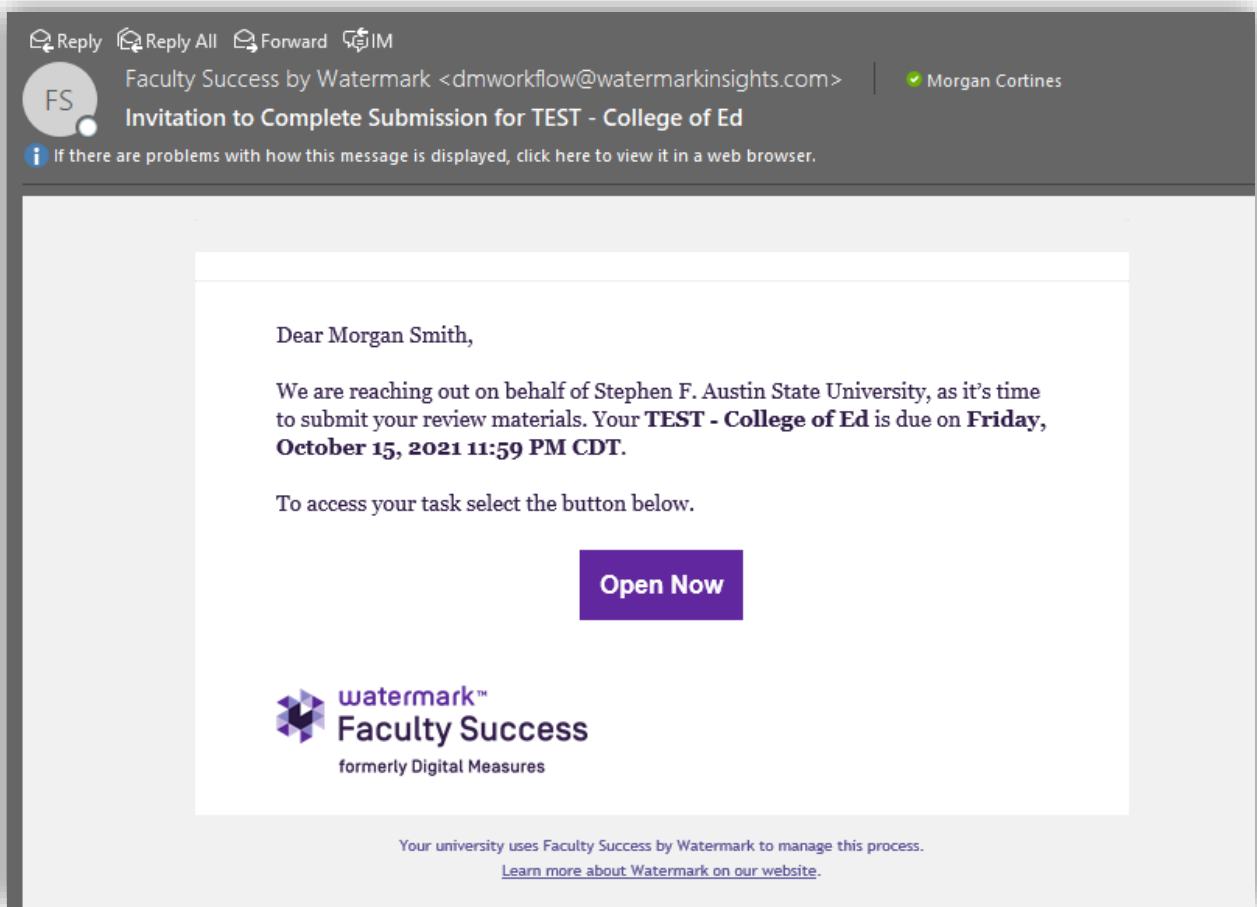


Accessing the Tenure and/or Promotion Materials in Workflow

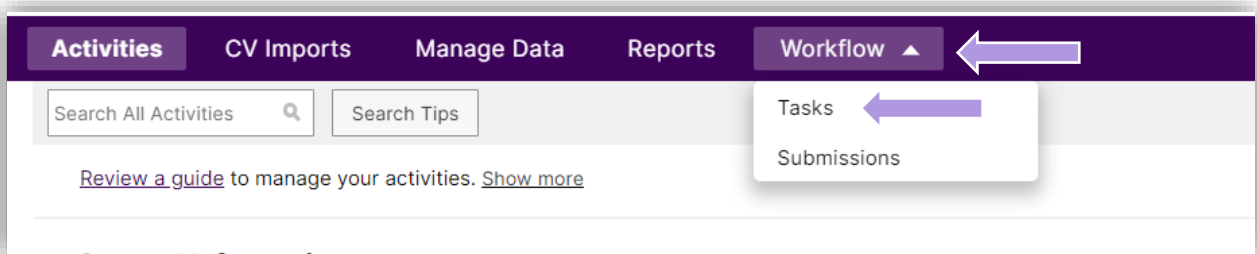
When the Workflow process launches, tasks are created and await the attention of the faculty candidate who will submit their materials. The faculty member can access these tasks through the email that is generated when the process launches. The invitation email will appear similar to the image below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

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

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



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



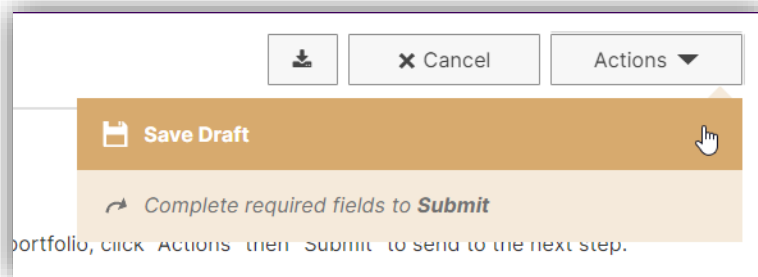
The workflow will show up under “Inbox.” Access the workflow by clicking the text in the name column.

Workflow Tasks			
▼ Inbox			
Name	Step	Subject	Due Date
TEST - College of Ed	Faculty	Me	October 15, 2021 @ 11:59 PM

Reviewing and Editing Faculty Review Materials

Once users access their tasks in Workflow, they can submit all the necessary materials.

Because users may want to complete their submission in more than one sitting, Workflow includes the option to save their progress and finish the submission later. To save progress, click the “Actions” button, then click “Save Draft”. Faculty will be able to pick up where they left off when they log back in.

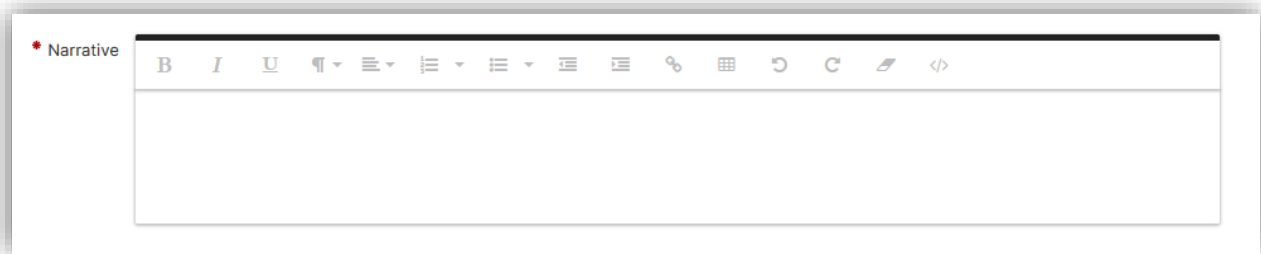


NOTE: Faculty should save their progress frequently while working through the Faculty Step. Faculty Success times out after a few minutes, and it is possible any unsaved work could be lost.

Since the Faculty Step of the Tenure and/or Promotion Workflow is designed to take the place of the traditional paper tenure/promotion portfolio, there are many pieces required to complete the Faculty Form before submitting. These pieces are included 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. More information is provided below about each type of data field.

1. Text Fields

- a. Text fields may be used to type out narratives, or faculty may paste narratives saved from other word processing software directly into text fields. (Saving narratives elsewhere is a good way to ensure they are not lost in the event of an accident.) Please note that tables may be created in text fields.



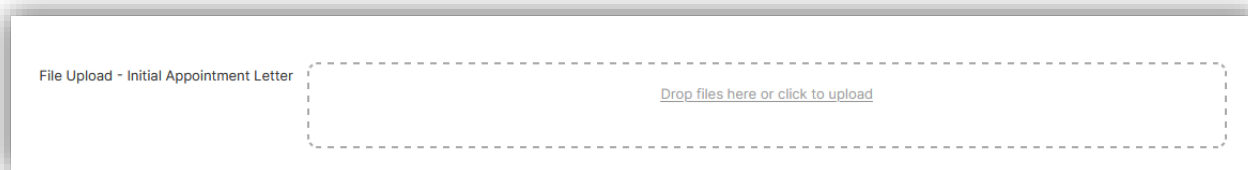
2. Drop-down Menus

- a. To respond to prompts or questions that employ Drop-down Menus, click the black arrow, and select the appropriate response.




3. File Upload Fields

- a. The majority of information included in the portfolio will be added via File Upload Fields. To upload the required documents, click “Drop files here or click to upload,” then navigate to the file in your computer’s directory.
- b. It is important to note that some File Upload Fields ask faculty to upload reports from Faculty Success, such as the Faculty Activity Report. To do this, open Faculty Success in another tab, then click "Reports" in the purple ribbon at the top of the screen. Choose the appropriate report from the list (e.g. "Annual Faculty Activity Report") from the list. Key in the appropriate date range for your tenure or promotion process. Click "Run Report." The report should save to your Downloads folder on your computer. Click “Drop files here or click to upload” and navigate to the downloaded report to upload it to your Workflow portfolio.



4. Embedded Reports


- a. To ensure that an embedded report is up to date, click “Refresh Report.” When the report has been refreshed, it will display the date and time it was last refreshed.

Course Evaluations  Last Updated
Date and Time Refresh Report

This action will update the attached report based on the information available under Manage Activities. This action cannot be undone. To preview this report's updated output, go to Run Reports and generate the report there first.

Are you sure you want to refresh this report's contents?

No Yes

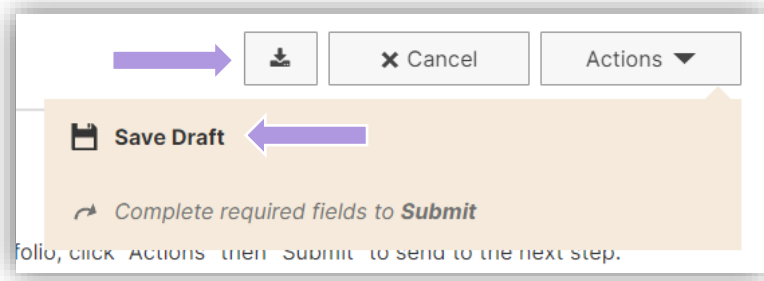
Course Evaluations  Last Updated
October 14, 2021 at 2:02 PM Refresh Report

The Faculty Portfolio step of the Tenure and/or Promotion process is broken into multiple sections. Each section includes a variety of data fields.

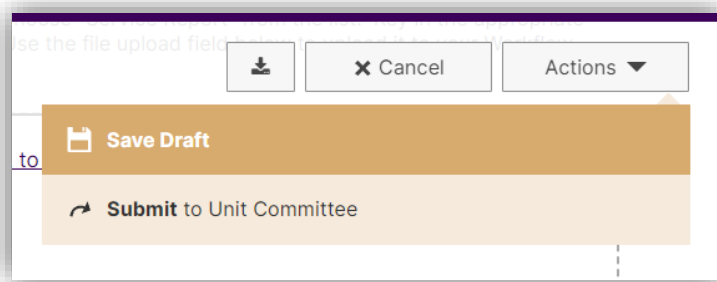
Submitting Faculty Review Materials to the Workflow Process

NOTE: Lists of required materials for each college's workflow processes are available on the Office of Institutional Research website and will be updated when applicable.

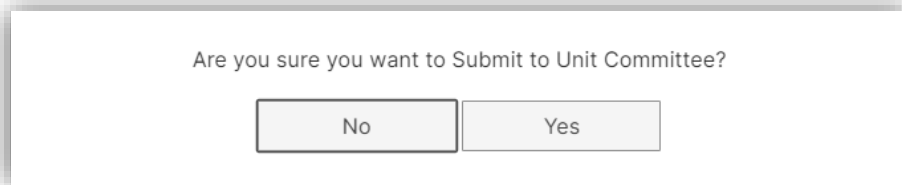
Prior to submitting, portfolio materials may be saved (to finish the submission later) or downloaded for archival purposes by clicking the icons in the upper right corner of the screen.



To submit materials to the next review step, click “Actions” in the upper right corner of the screen, then choose “Submit to [Next Reviewer]”.



The system will ask if you are sure you are ready to submit. Clicking “Yes” will submit the portfolio; clicking “No” will bring you back to the portfolio step.



NOTE: As long as the submission is on the immediate next step after the faculty submission, faculty can "recall" the submission, essentially pulling it back to the faculty step to allow for correcting errors in the submission.

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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	Recall
Report Refresh Test	Completed	Me	June 27, 2021 @ 11:59 PM	Download

Contributing to “Faculty Errors of Fact” or “Optional Faculty Response” Steps

Faculty will have the opportunity to respond to reviewers’ comments after the Unit Head and Dean steps.

To respond, type comments into the “Comments – Errors of Fact” text field and/or use the File Upload field to upload a file (or files) which address the error of fact.

These fields are optional—if there are no errors of fact, faculty do not have to include anything in these fields. Once this step is completed, click “Submit to [Next Step].”

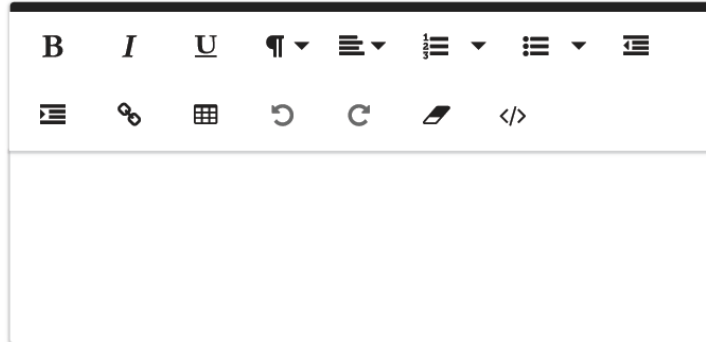
Use this form to make comments on errors of fact and upload any documents which support your comments. These fields are optional.

* I am submitting an Error of Fact

Yes

No

Comments - Errors of Fact



A rich text editor toolbar with various icons for text formatting and editing. The icons include Bold (B), Italic (I), Underline (U), Paragraph (¶), List (☰), Bulleted List (☰), Numbered List (☰), Indent (☰), Outdent (☰), Table (☰), Link (🔗), Grid (☰), Undo (↶), Redo (↷), Text Color (🖌), and Code (</>).

File Upload (Optional)



A dashed rectangular box containing the text "Drop files here or click to upload" in a purple, underlined font.

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

Decision Notification Step

After all parties have reviewed the faculty member's Tenure and/or Promotion materials and a decision has been made, the faculty member will receive a notification of the reviewers' decision through the Faculty Success Workflow. In order to complete the workflow and send it to the Provost's Office for archiving, the faculty member must acknowledge the reviewers' decision and submit it to the next step.

To do so, select the "Yes" radial button at the bottom of the form, then enter any desired final comments. (The Comments text field is optional.) Once this step is completed, click "Submit to [Next Step]."

Decision Notification - Faculty Form Cancel Apply

Comments

B I U

* I have been notified of the reviewers' decision on my Tenure and/or Promotion portfolio.

Yes
 No

Final Steps

After participants have submitted their materials 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 can check the status of their submission, review the content of the submission, and view accessible fields completed by reviewers in subsequent steps.

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

Workflow Tasks

▼ **Inbox**

Name	Step	Subject	Due Date
<i>No Data to Display</i>			

▼ **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	▼

NOTE: The contents of the submission can also be exported for archival purposes. Click the black arrow under actions for the desired workflow, and then click “Download.” It will download as a ZIP file in your computer’s Downloads folder.

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Activities CV Imports Manage Data Reports Workflow

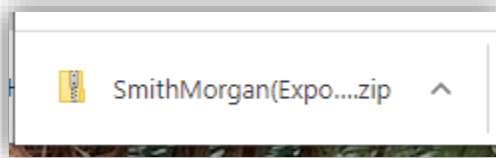
Workflow Tasks

▼ 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



After the process has been completed, it will remain under History for that user. Additionally, after the process has been completed, the workflow, including all related review comments and materials, will be archived in the Provost's Office.

Thank you for submitting your faculty review materials via workflow!

With questions, please contact:

Office of Institutional Research

936-468-3806

sfa_ir@sfasu.edu