

# Watermark Faculty Success: *Putting it Together for 3rd Year Review, Promotion, & Tenure*

JB Amacker - *Office of Institutional Effectiveness*  
Workflow Administrator



watermark™  
**Faculty Success**

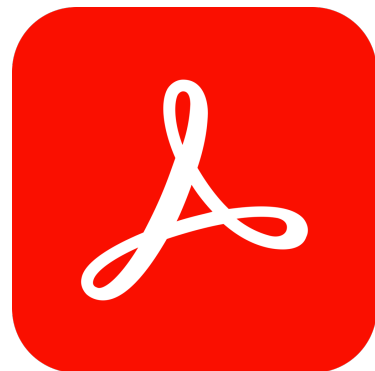
formerly Digital Measures



THE UNIVERSITY OF  
**SOUTHERN**  
**MISSISSIPPI.**

# Before you begin...

- You will need PDF editing software
- Foxit PDF Editor for Education (\$39.99 / year) or Adobe Acrobat Pro (\$19.99 / month)
- Potentially free options... or Adobe free trial



# Before you begin...

- Review the Faculty Handbook, Dossier Format, and your school's P&T guidelines
- Reach out to a colleague and use their dossier submission as an example
- Plan time to work on your dossier! The deadline will quickly approach. Allow time for colleagues to review before you submit
- Do not submit until your student evaluations are posted for all semesters. (A few weeks after classes end. Pre-Tenure will need to be careful with this)



# Resources

## Office of the Provost Website

<https://www.usm.edu/provost/promotion-and-tenure.php>

- Promotion and Tenure Dossier Instructions
- Promotion and Tenure School Documents
- Faculty Handbook chapters on promotion and tenure (Chapter 5.2-5.2.4 for pre-tenure review)

## School/College Colleagues

- Your school director should be a primary point of information and guidance
- Faculty mentor
- Colleagues from other schools/disciplines

# Dossier

- “Dossier” refers to the entirety of the materials submitted for review
- Contains the information that **demonstrates** your accomplishments, impact, and potential for continued and sustained performance
- Needs to be organized, concise, relevant, and substantive
- There are four sections: the facts, scholarship/creative activity, teaching or librarianship, and service



# Dossier Components

- A. P&T / Pre-Tenure Documents
  - Unit guidelines, offer letter, CV, annual evals, narrative
- B. Research, Scholarship, and Creative Activities
- C. Teaching
  - Student evaluations
- D. Service



# A. Pre-Tenure Documents

*Two separate files (in the same box)...*

- Offer letter (For Pre-Tenure Review)
  - Can redact salary
- Unit Guidelines (All that is needed in first box for P&T)
  - Available on Provost's site, school director

*One file for each upload box...*

- Curriculum Vitae
  - Using P&T Template, under reports in Faculty Success
  - You must update the dates! Past three years
- Annual Evaluations
  - Final PDF version of evals downloaded from Workflow
- Personal Essay/Narrative Statement



# A. Pre-Tenure Documents

## A. Pre-Tenure Dossier Documents

TWO separate files: Unit Guidelines AND Offer Letter (redact salary) \*

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

Curriculum Vitae (Promotion and Tenure CV Template - Under Reports in Faculty Success. Must update dates) \*

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

Annual Evaluations (include the final PDF version of evaluations downloaded from Workflow) \*

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

Personal Essay/Narrative Statement File \*

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





## B. Research, Scholarship & Creative Activities

### Single file submission

- Documentation of research, scholarship & creative activities
  - Summary listings of articles
  - Links to external copies of documents
  - Summary of grant applications
  - Summary of citations
  - It is not necessary to include entire books, chapters, or articles unless specified by unit criteria/guidelines
  - *Typically* the longest section



## **B. Professional Development/Scholarship/Creative Activities** *(Optional piece for Teaching-Track Promotion Review)\*\*\**

Single file submission

- For Teaching Track faculty promotions, this section is optional. Use this section only if it is applicable to you.



# C. Teaching

Two separate file submission

1. Narrative of teaching effectiveness
  2. *Student course evaluation files* (this has been updated for post-Spring 2020 to be an automatically generated report). Prior to Spring 2020 will need to be retrieved via SOAR.
- Check your unit guidelines and criteria for additional specific documentation to be included in this section.



# C. Teaching

## C. Teaching

This section includes documentation of teaching effectiveness and should contain two separate files. *Check unit guidelines and criteria for additional specific documentation to be included*

### 1. Teaching

**FILENAME:** Lastname\_First\_Teaching

### 2. Mandatory student evaluations administered during all previous semesters, in reverse chronological order.

**FILENAME:** Lastname\_First\_Course\_Evaluations

Teaching\*

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

Student Course Evaluation Files (if they are pre-Spring 2020)

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

**Fall 2023 teaching evaluations will not be available until after the end of the semester. You will be notified by email when they are ready, please do not submit before.**

Report - Scheduled Teaching - this has the Watermark Course Eval Links



Last Updated  
Date and Time



# D. Service

## Single file submission

- Documentation supporting the value and effectiveness of your university, professional, and public/community service activities during the review period.
- This is *typically* the shortest section

### D. Service

Documentation supporting the value and effectiveness of the university, professional, and public/community service activities.

FILENAME: Lastname\_First\_Service

Service\*

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

# Filename Structure

## A. Dossier Documents

- *Lastname\_First\_Guidelines*
- *Lastname\_First\_OfferLetter*
- *Lastname\_First\_CV*
- *Lastname\_First\_AnnualEvaluations*
- *Lastname\_First\_PersonalEssay*

## B. Research, Scholarship & Creative Activities

- *Lastname\_First\_Research*

## C. Teaching

- *Lastname\_First\_Teaching*
- *Lastname\_First\_Course\_Evaluations*

## D. Service

- *Lastname\_First\_Service*



# Faculty Success Workflow

- Provost's landing page – [www.usm.edu/provost/](http://www.usm.edu/provost/)
- Bookmark once you've visited!

People

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Faculty/Staff Resources

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Policies, Procedures & Forms

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Contact Us

[Office of the Provost](#)

Lucas Administration Building

Hattiesburg Campus


[Campus Map](#)

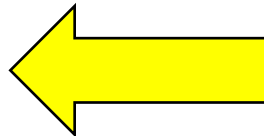
Email 

[provost@usm.edu](mailto:provost@usm.edu)

## Office of the Provost

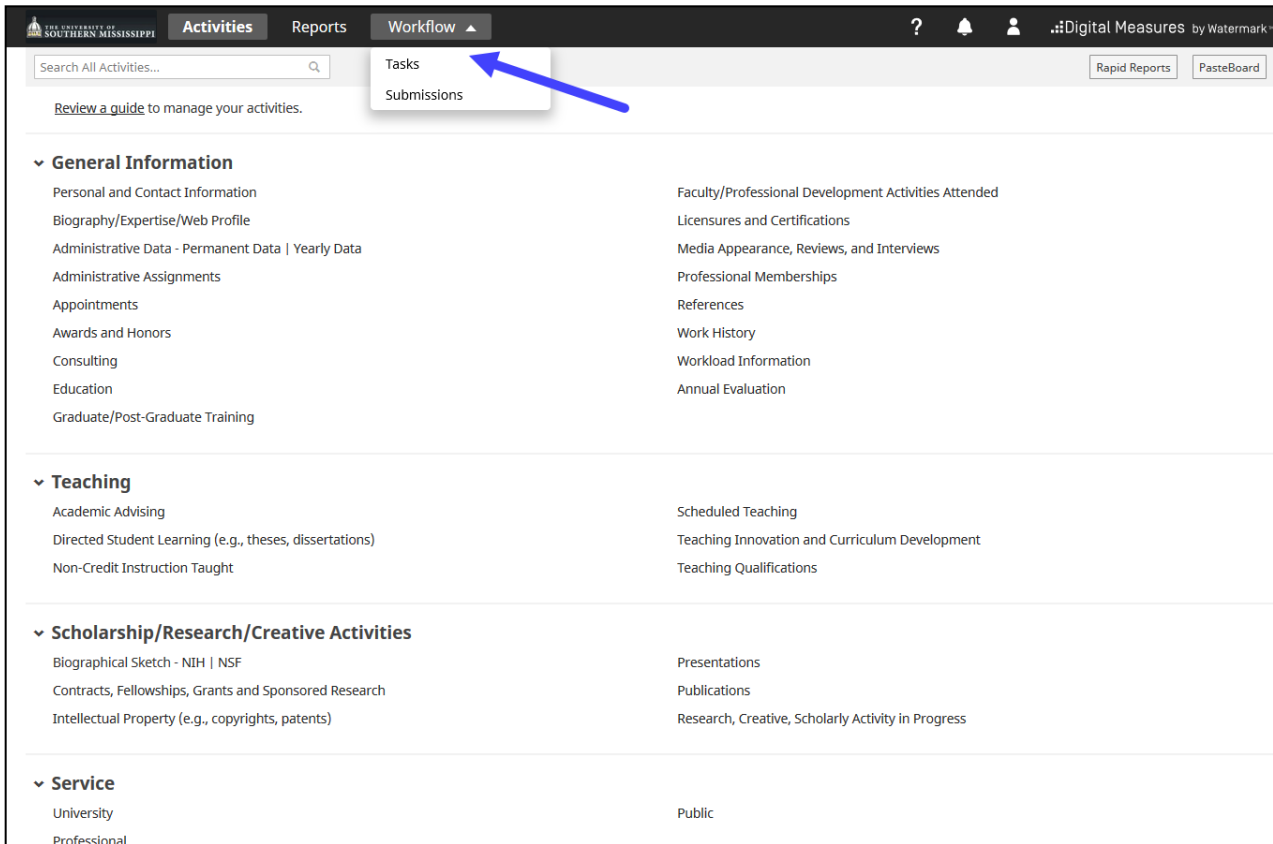
The Provost and Senior Vice President for Academic Affairs serves as chief academic officer for The University of Southern Mississippi, leading strategic planning and implementation of key initiatives throughout academic affairs. The Office of the Provost provides leadership to all campuses and academic areas to support excellence in faculty research and creative endeavors, enhance student achievement, and foster strong relationships with community partners. Through leadership of the academic affairs division of the University, the Provost supports the vision of the University President for The University of Southern Mississippi to be an innovative and dynamic model for public higher education.

Watermark Faculty Success 



# Faculty Success Workflow

- Look for “2024-2025 P&T Review / Promotion Review / Pre-Tenure Review” task in your Workflow panel



The screenshot shows the Faculty Success Workflow interface. At the top, there are navigation tabs for 'Activities', 'Reports', and 'Workflow'. The 'Workflow' tab is selected, and a dropdown menu is open, showing 'Tasks' and 'Submissions'. A blue arrow points to the 'Tasks' option. Below the navigation, there is a search bar for 'Search All Activities...' and a 'Review a guide to manage your activities.' link. The main content area is divided into four sections: 'General Information', 'Teaching', 'Scholarship/Research/Creative Activities', and 'Service'. Each section contains a list of activity categories.

Section	Activity Categories
General Information	Personal and Contact Information, Biography/Expertise/Web Profile, Administrative Data - Permanent Data   Yearly Data, Administrative Assignments, Appointments, Awards and Honors, Consulting, Education, Graduate/Post-Graduate Training, Faculty/Professional Development Activities Attended, Licensures and Certifications, Media Appearance, Reviews, and Interviews, Professional Memberships, References, Work History, Workload Information, Annual Evaluation
Teaching	Academic Advising, Directed Student Learning (e.g., theses, dissertations), Non-Credit Instruction Taught, Scheduled Teaching, Teaching Innovation and Curriculum Development, Teaching Qualifications
Scholarship/Research/Creative Activities	Biographical Sketch - NIH   NSF, Contracts, Fellowships, Grants and Sponsored Research, Intellectual Property (e.g., copyrights, patents), Presentations, Publications, Research, Creative, Scholarly Activity in Progress
Service	University, Professional, Public



# Sample Submission Screen

- Yours may look slightly different

**A. Pre-Tenure Dossier Documents**

Unit Guidelines and redacted Offer Letter (separate files) \*

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

Curriculum Vitae (using template in Digital Measures) \*

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

Annual Evaluations (include the final PDF version of evaluations from Workflow.) \*

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

Personal Essay/Narrative Statement File \*

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

**B. Research, Scholarship and Creative Activities**

Filename: Lastname\_First\_Research

Research/Scholarly and Creative Works Dossier \*

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

**C. Teaching**

1. Teaching

2. Mandatory student evaluations administered during all previous semesters, in reverse chronological order.

FILENAME: Lastname\_First\_Teaching      FILENAME: Lastname\_First\_Course\_Evaluations


Teaching \*

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

Student Course Evaluation Files (if they are pre-Spring 2020)

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

Report - Scheduled Teaching - this has the Watermark Course Eval Links

 Last Updated Date and Time      [REFRESH REPORT](#)

**D. Service**

FILENAME: Lastname\_First\_Service

Service \*

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

# CV Template Report in Faculty Success

- This report provides a standard format and template as a Word document that you can edit.
  - If you haven't completed your FS account – don't worry!
- The report will pull data already entered into FS (but you will be able to edit the Word document.)
- You can also add subsections that are specific to your discipline or delete sections that are not applicable to your submission.
- Do not change the order of sections – the reviewers want a consistent template for CV review.



# CV Template Report in Faculty Success

The screenshot shows a web browser window with the URL [https://www.digitalmeasures.com/login/usm/faculty/app/reporting/?\\_s=0](https://www.digitalmeasures.com/login/usm/faculty/app/reporting/?_s=0). The page header includes the University of Southern Mississippi logo and navigation tabs for 'Activities' and 'Reports'. A '+ Create a New Report' button is located in the top right. Below the header, a message reads: 'Select the report you would like to view or edit, or select to create a new report.' A table lists various reports with columns for 'Name', 'Created By', and 'Actions'. The 'Promotion and Tenure CV Template' report is highlighted with a yellow border. A yellow arrow points from the 'Reports' tab to the table.

Name	Created By	Actions
ABET Appendix B - Faculty Vitae	Digital Measures	🔒
Annual Evaluation Report	Digital Measures	🔒
Faculty T&P Recommendation Form Report	Digital Measures	🔒
Individual Faculty Workload Information Report	Digital Measures	🔒
Promotion and Tenure CV Template	Digital Measures	🔒
SGII CV Report	Masterson, Douglas S	🔒 ▼
Vita	Digital Measures	🔒

# Running the CV Template Report

University of Southern Mississippi | +

https://www.digitalmeasures.com/login/usm/faculty/app/reporting/fullservice/30193

Digital Measures | Promotion and Tenur... | Music and Podcasts, F... | MachForm Admin Pa... | Forms and Resources |... | The Online Dog Train... | Associate Council Se... | ODT | USM Faculty First Wee...

THE UNIVERSITY OF SOUTHERN MISSISSIPPI | Activities | Reports | ? | Bell | User | Digital Measures by Watermark

## < Run Promotion and Tenure CV Template

Download this report's template Run Report

1 **Date Range** Start Date: January 01 2004 End Date: December 31 2019

2 **Report Options** a) Do you want an abbreviated report? Detailed b) Do you want to hide sections without any activities? Hide

3 **File Format** File Format: Microsoft Word (.doc) Page Size: Letter

Changes made to the Microsoft Word document **will not** be reflected in the system.

Opening Promotion+and+Tenure+CV+Template-20190823-133843-CDT...  
You have chosen to open:  
...otion+and+Tenure+CV+Template-20190823-133843-CDT.doc  
which is: Microsoft Word 97 - 2003 Document (14.9 KB)  
from: https://s3.amazonaws.com

What should Firefox do with this file?  
 Open with Microsoft Word (default)  
 Save File  
 Do this automatically for files like this from now on.

OK Cancel

1. **Select the date range**

2. Keep file format as Microsoft Word so you can edit the document. You will save it as a PDF later and upload it to your file.

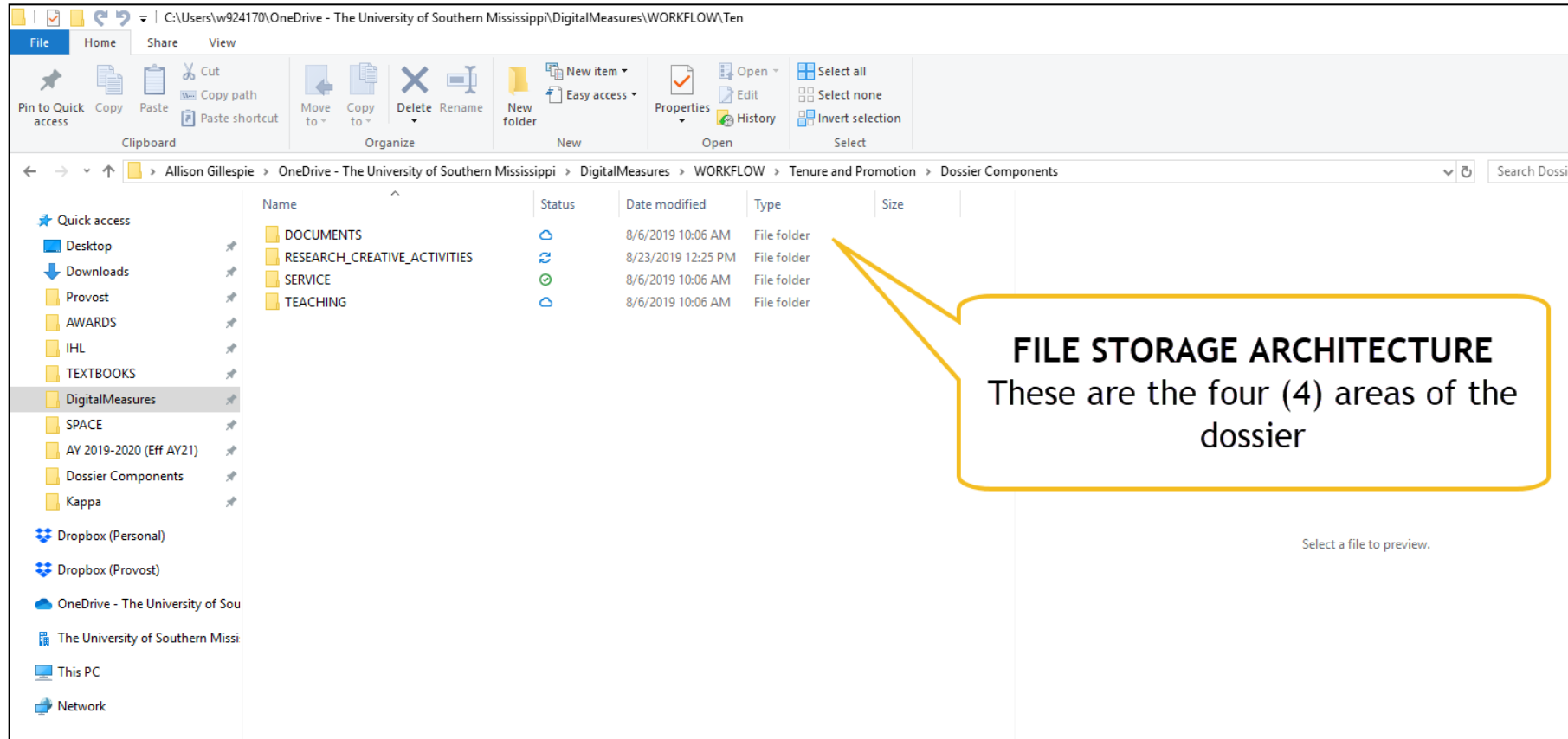
3. Click Run Report

4. Once report has been run, choose to Open With or Save File (pay attention the location)

5. When you are ready to upload your CV, make sure to EXPORT it to PDF so that any links will stay active. Test the links before you submit!

# Working with PDF Files

- Create a separate folder for each section of the dossier



# Working with PDF Files

- Many ways to create PDF Files:
  - Export as
  - Save as
  - Print to
  - Convert to
  - Combining existing documents with PDF editor software
- Before uploading final documents, be sure to **EXPORT AS** (rather than *SAFE AS*) to ensure **links** work properly.
- Tutorials are the best way to learn – Adobe site has excellent ones



# Working with PDF Files

- Some upload boxes will call for single/separate PDF files
  - Section A. Dossier Documents
  - Guidelines
  - CV
  - Essay
  - Appointment Letter
- The rest require you to combine files into one PDF document
  - Section B-D
  - B. Research
  - C. Teaching (Student course evals will be a separate file, but all evals in the same file)
  - D. Service

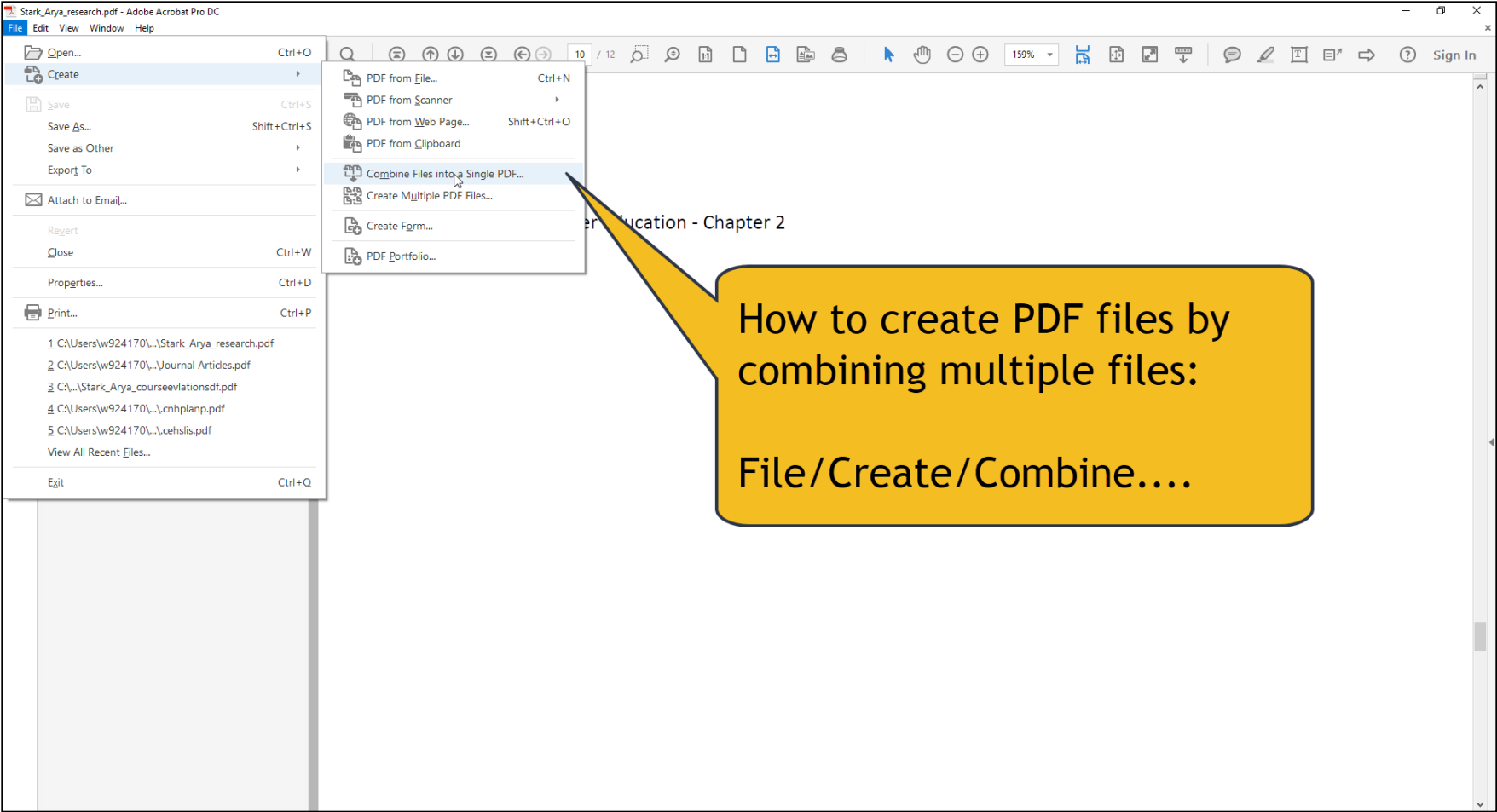
# Combining documents into PDF

- Creates a “binder” that you will need to rename
- You can reorder all files & pages before you finalize
- Combining puts all documents and pages into one PDF file
- Rename the file to the section or subsection of the dossier (i.e. Research or Peer Reviewed Publications)
  - Do this before combining, as file names of combined documents become bookmarks with those names
- It is *easiest* to combine inside a PDF editor, but there are other options
  - Windows File Explorer, online PDF combine tool





# Combining documents into PDF

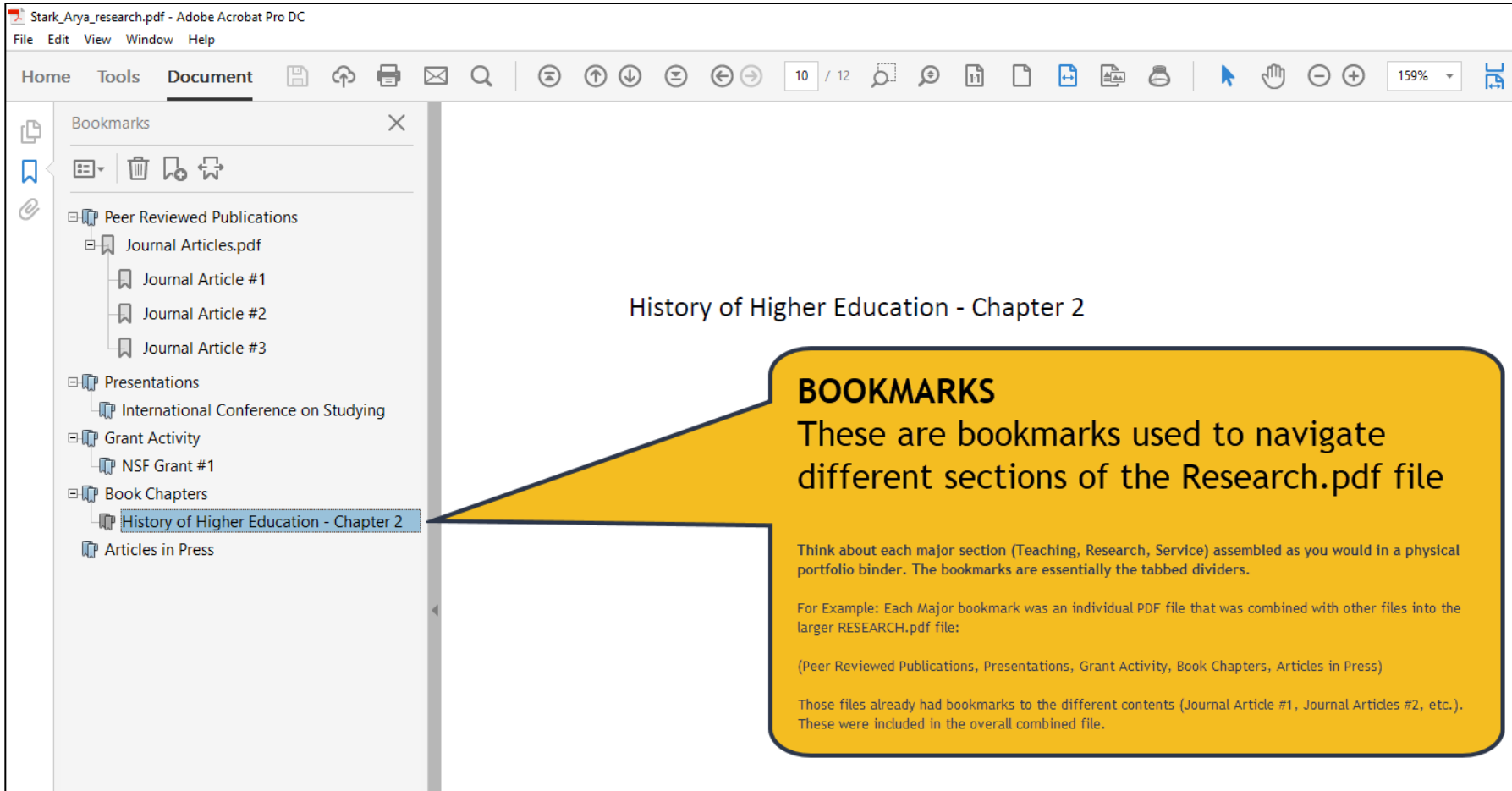


# Bookmarks – Be kind to your reviewers

- Bookmarks are created automatically when individual PDF files are combined
- Allow for easy navigation in the large document
- Work like “hyperlinks” to a specific section of the dossier file
- Can be added, edited, or rearranged
- Location of the bookmark doesn’t necessarily correlate with the location in the document – so be careful!
- If files with bookmarks are added, the bookmarks are included underneath the file name (which is now a bookmark in the larger file)



# Bookmarks – Be kind to your reviewers



Stark\_Arya\_research.pdf - Adobe Acrobat Pro DC  
File Edit View Window Help

Home Tools Document

Bookmarks

- Peer Reviewed Publications
  - Journal Articles.pdf
    - Journal Article #1
    - Journal Article #2
    - Journal Article #3
- Presentations
  - International Conference on Studying
- Grant Activity
  - NSF Grant #1
- Book Chapters
  - History of Higher Education - Chapter 2**
- Articles in Press

History of Higher Education - Chapter 2

**BOOKMARKS**  
These are bookmarks used to navigate different sections of the Research.pdf file

Think about each major section (Teaching, Research, Service) assembled as you would in a physical portfolio binder. The bookmarks are essentially the tabbed dividers.

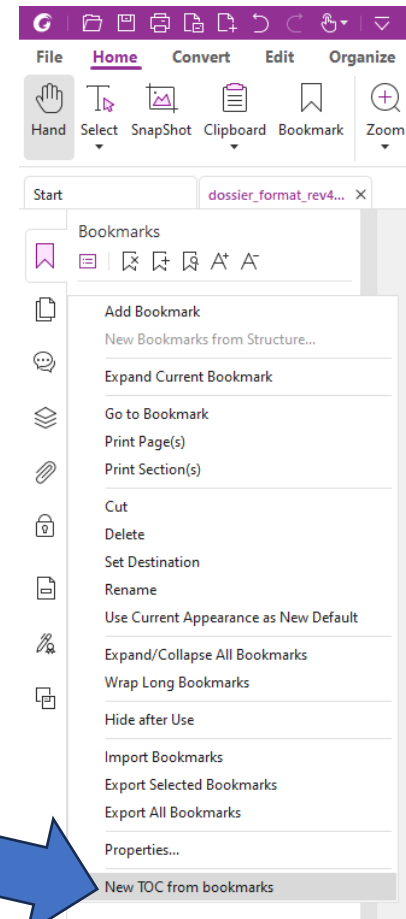
For Example: Each Major bookmark was an individual PDF file that was combined with other files into the larger RESEARCH.pdf file:

(Peer Reviewed Publications, Presentations, Grant Activity, Book Chapters, Articles in Press)

Those files already had bookmarks to the different contents (Journal Article #1, Journal Articles #2, etc.). These were included in the overall combined file.

# Bookmarks – Generate Table of Contents

- Make sure you have bookmarks created first!
- PDF editing software can automatically generate a TOC for you, with clickable links within the document!



# Uploading and Submitting Files

- **Access:** after you log into Faculty Success, navigate to Workflow/Tasks/Inbox
- **Enter Information:** Click on the Pending Task
- **Upload:** Enter the information and upload files as indicated on the screen
- **Save/Submit:** You can save your progress before you hit the final SUBMIT button!



# Workflow Inbox and History

- Inbox – Active tasks waiting on your action. Click on the task to begin the submission process
- History – Shows completed tasks and status of application review process. Click to view reviewer comments

The screenshot displays the 'Workflow Tasks' interface for The University of Southern Mississippi. The navigation bar includes 'Activities', 'Reports', and 'Workflow'. The 'Workflow Tasks' section is divided into 'Inbox' and 'History'.

**Inbox**

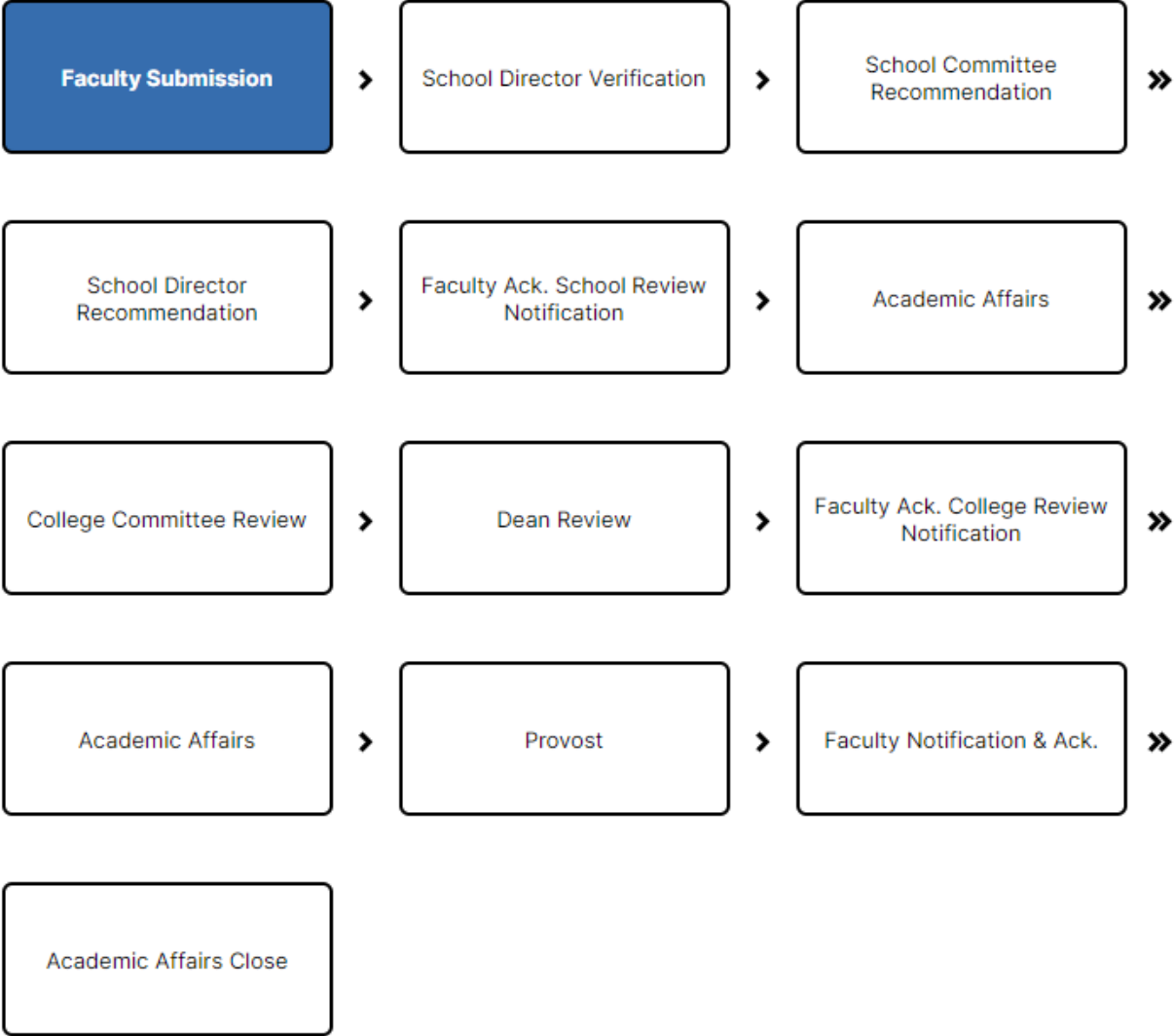
Name	Step	Subject	Due Date
P&T Training ZZ 7-17-19	Faculty	Me	July 18, 2019 @ 11:59 PM

**History**

Name	Current Step	Subject	Last Modified	Actions
Faculty Training #2	Dean	Me	August 20, 2019	

Callouts in the image highlight the 'Pending Task' in the Inbox and the 'Status of Process - currently at the Dean level review' in the History section.

# Viewing the progress

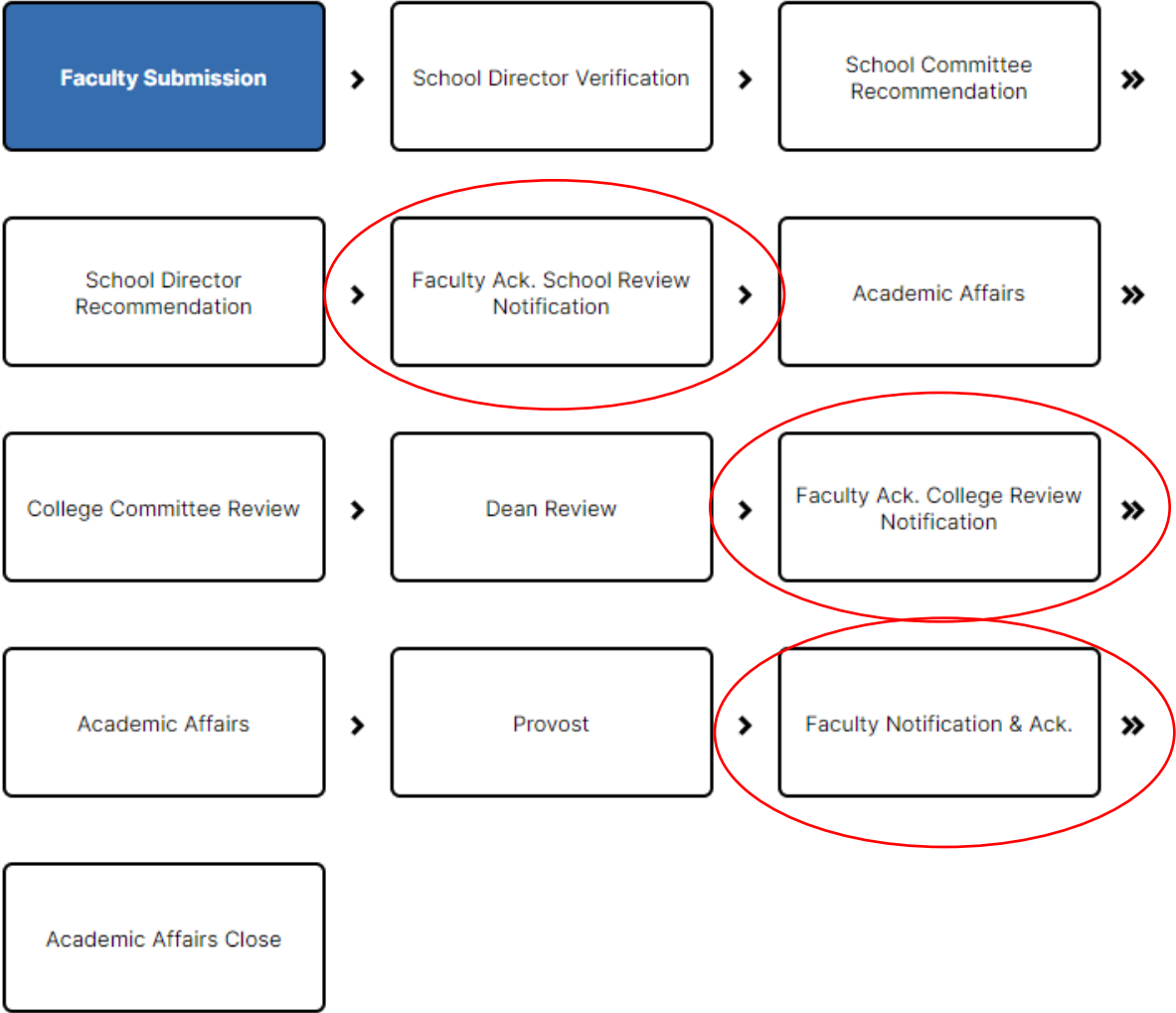


# Viewing the progress

- The review process follows the current process that is outlined in the Faculty Handbook
- You can see the status of your review process in the History tab in Workflow
- Once your review has been completed at a certain level, you will be able to view the recommendation and any letter/comments uploaded into Workflow



# Acknowledgement/Rebuttal Step



# Acknowledgement/Rebuttal Step

- You will need to acknowledge your receipt of recommendations after the school director, Dean, and Provost steps in Workflow
- Applications cannot move along until the acknowledgement is completed
- You will be able to view all comments & file uploads
- Faculty maintain the right to a rebuttal after each of these steps, please consult your school director if you wish to initiate that process

# Saving your completed submission

- Click on the Download button
- Downloads a Zip File with everything in it
- Choose the option that save files to your computer

[< Graduate Faculty Status \(test7-10-19\) - Completed](#) [Download](#) [Close](#)

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▼Faculty (or School Director Submission) Step - ZZ\_Edith Bunker Submitted July 10, 2019  
by ZZ\_Edith Bunker

# REMINDERS!

- Start early, give yourself time
- You can do this!
- Solicit a second pair of eyes
- Ask for help, we can't help if we don't know
- Start EARLY!



# Live Faculty Success Workflow Demo



**Thanks for attending,  
good luck with your review!**



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