Slippery**Rock** University ᴿᴹ

Using WFS Workflow to Submit a Faculty Review

The configuration of WFS aligns with the PASSHE-APSCUF CBA and Slippery Rock University's local policies and procedures. Local policies and procedures for faculty milestones can be found at https://www.sru.edu/offices/academic-affairs/faculty-resources in the Faculty Milestones accordion.

Academic Year 2022-2023

Accessing Watermark Faculty Success

Submission of reviews is completed through WFS Workflow. You can access Watermark Faculty Success through one of two ways:

MySRU:

1. Go to https://mysru.sru.edu/ and log in with the SRU credentials.
2. Select the professional development tab.
3. Click on Watermark Faculty Success (WFS). There is no separate login.
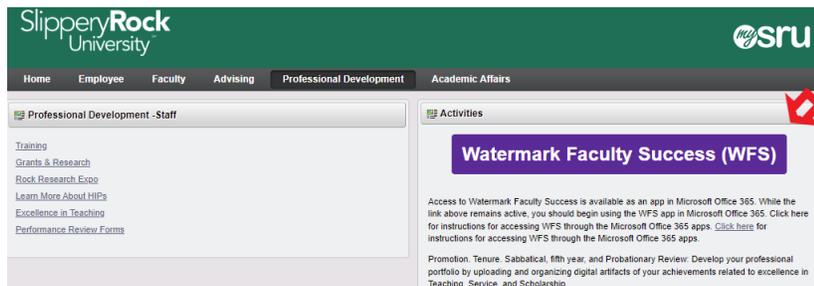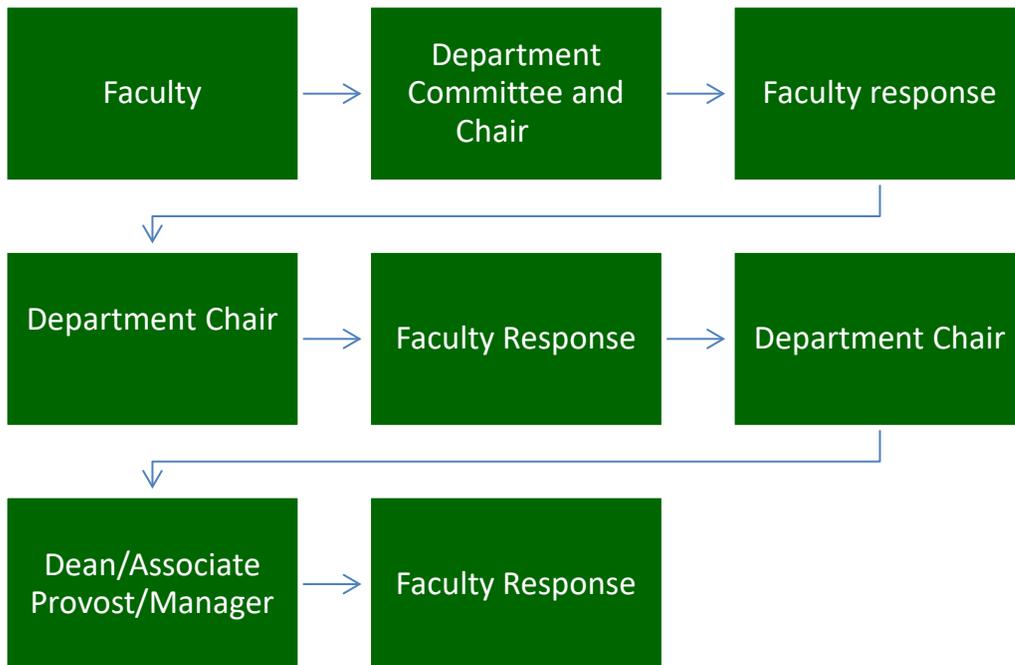

Microsoft 365: Faculty can access WFS through Microsoft 365 even if they do not use it for their regular SRU email. One of the great things about this avenue is that they can easily access it from wherever there is an internet connection.

1. Launch an Internet browser using the most recent versions of Google Chrome or Mozilla Firefox. Keep in mind that using IE, Safari or other browsers sometimes make reports fail.
2. Navigate to https://www.office.com, which will open Microsoft Office 365.
3. Sign in using the SRU username and password.
4. Navigate to All Apps by clicking on the app icon ⠿ in the upper left.
5. Click on Watermark_Faculty_Success, which will take users to the portal. There is no separate login. If you don't see Watermark_Faculty_Success right away, try using the search function at the top of the apps column.
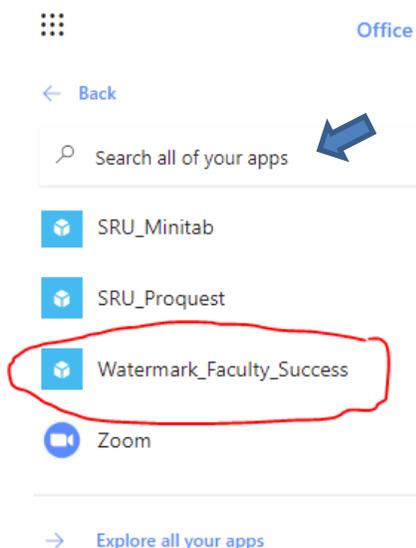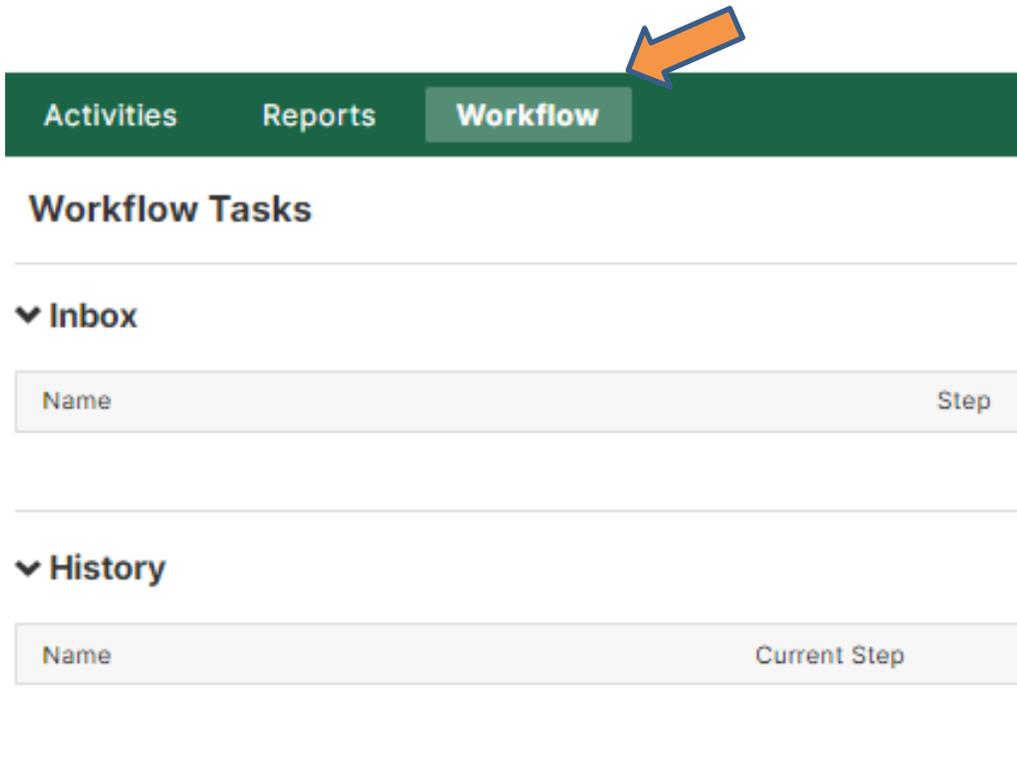
This chart shows a sample progression of the faculty review in Workflow. The owner of each step takes action and then moves the review to the next step. The Faculty Member has an opportunity to respond to each review step. Flows for specific reviews may have additional steps, e.g., the president or president's designee has a role in some reviews.

All flows are based on the CBA and the appropriate local policy and procedure documents. Local policies and procedures for faculty milestones can be found at https://www.sru.edu/offices/academic-affairs/faculty-resources in the Faculty Milestones accordion.

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┌─────────────┐      ┌─────────────────┐      ┌─────────────────┐
│             │      │   Department    │      │                 │
│   Faculty   │ ───> │ Committee and   │ ───> │ Faculty response│
│             │      │     Chair       │      │                 │
└─────────────┘      └─────────────────┘      └─────────────────┘
                                                       │
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       ▼
┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│ Department Chair│ ───> │ Faculty Response│ ───> │ Department Chair│
└─────────────────┘      └─────────────────┘      └─────────────────┘
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┌─────────────────┐      ┌─────────────────┐
│  Dean/Associate │ ───> │ Faculty Response│
│ Provost/Manager │      │                 │
└─────────────────┘      └─────────────────┘
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Once you're in WFS, click on the last tab. This process assumes that you have uploaded all documentation in the Activities area and are ready to submit or interact with your review.

This is the Workflow Tasks screen. On this screen, you will interact with your scheduled review process. There are two sections:

1. Inbox - includes any active tasks that require action by you (orange arrow).
2. History – includes active tasks that you have begun but are currently at another step in the process (e.g. Department Chair) (blue arrow).

You can begin your review process by clicking the appropriate link in your Workflow Tasks Inbox (orange arrow).

Reviewing, Revising and Submitting Your Report

You are now on the first step on the process – 'Faculty Step." On this screen, you will:

1. Click on the red and white PDF report icon to review your report for completeness. To revise your Probationary Review report, use the "Activities" tab, return to the Workflow screen, and then click the "Refresh Report" button below (see arrow #1).
2. When your report is complete, click on the "Route" button and then "**Submit** *to Department Committee and Chair*" (arrow #2).
3. Click "Yes" on the submission confirmation popup (arrow #3).
4. If you desire, you may request a meeting with the Department Evaluation Committee to discuss your evaluation.

You'll notice now that the process has moved out of your Workflow Tasks Inbox and into History. The History section provides some helpful information:

1. Current Step – this shows at which step in the process your review resides (e.g. Department Chair, Department Evaluation Committee, Dean)
2. Subject – this shows who the subject of the process is. This will be "Self" if you are the subject of the review. If you are serving on a review committee, the name of the faculty member being reviewed will display here.
3. Last Modified – this shows the last date that someone has acted on the process.

Returned for Addition Action

The review process will return to your Workflow Tasks Inbox when additional action is required on your part. This will happen when:

1. An evaluation has been submitted to the process and requires your review.
2. Additional information/documentation has been requested of you by a step later in the process.

To review an evaluation or to add additional documentation to the process, click on the name of the process in the Workflow Tasks Inbox

Reviewing Your Evaluation

To review an evaluation that has been submitted to the process,:
1. Click on the Adobe PDF icon to review the evaluation report.
2. Confirm that you have had an opportunity to review the evaluation. Upload any documentation.
3. Click Route > Send to next step (e.g. Department Chair).

Adding Additional Documentation

If a process has been sent back to you for additional information/documentation:

1. Drag/Drop or Upload the missing files to the Additional Documents field. Use PDF format.
2. Type optional comments describing the action you are taking.
3. Click Route > Send to next step (e.g. Department Chair).