# FAQ sheet for faculty using WFS

The following FAQs address some common questions about using Watermark Faculty Success. You may find additional information and instructions on the SRU Faculty Resources webpage. Choose the Watermark Faculty Success tab in the left column.

The first step for any review is to read the CBA and local policies and procedures document to ensure that you are familiar with the requirements of your milestone. The documents also explain the review progression and list options you have for providing additional documents and responses to reviewer letters.

## Overview

1. **What's the difference between WFS/Watermark and Workflow?**
    a. Watermark Faculty Success (WFS) is the software Slippery Rock uses for faculty milestones including annual reviews, tenure, sabbatical, and promotion. It is a repository or database where faculty can upload evidence and analysis appropriate to teaching, scholarly growth and professional development, and service as they prepare to submit milestone reports.
    b. Workflow is an option within WFS that moves reports from one reviewer to another. Faculty build their evidence in the Activities tab and use Workflow to distribute the review others.

## Accessing WFS

2. **How do I access WFS?**
    a. Instructions for accessing WFS in Microsoft 365 or mySRU are available here under the Accessing WFS on and off-campus accordion.
    b. If you get an error page trying to login, try these solutions:
        - Use another browser (e.g., if you are using Chrome, try Firefox).
        - Clear your cache.
        - Use an incognito page in your browser.
        - If these don't work, contact Mary Hennessey.

3. **I use a Mac and I'm having problems accessing the software.**
   WFS works best with Chrome or Firefox browsers. Macs often default to Safari or Internet Explorer. Change browsers to Chrome or Firefox.

4. **I did not get an email notifying me that I have an evaluation due or I can't see my review in WFS Workflow.**
    a. The notification email sometimes goes to user's junk mail. You should be aware of your upcoming reviews by understanding the SRU policies and procedures documents. You can always check your Workflow tab in WFS—if you have an item in your WFS inbox,

then you have a task to complete. Faculty have to initiate their reports for review and then have periodic steps to complete to acknowledge that they have seen each reviewer step.

b. Schedules are released about two weeks before the first due date. Although you may work on your activities and narrative at any time, including running sample reports to check your progress, you will not be able to enter your report in Workflow until your schedule is in your WFS inbox.

c. Contact the SRU WFS administrator, Mary Hennessey, to troubleshoot.

## Adding activities and other information

**5. What's the best format for my information?**

Always use PDF for information you enter in WFS. Using the PDF format prevents documents from being accidentally changed. It also is easier for reviewers to open each piece. Use the PDF bookmark feature for longer items.

6. **My scheduled teaching list has missing/extra classes.**

The Slippery Rock WFS administrator uploads the scheduled teaching lists on a given date each semester. Changes made to your schedule after that date will not be reflected in your WFS scheduled teaching area. You can add new classes or delete classes in the list by hand. Note that no classes were uploaded in Spring 2020, so you will have to add all those sections by hand.

**7. How do I create my faculty workload document?**

There are instructions for running this document on the Faculty Resources webpage. Click on Watermark Faculty Success in the left column and open the Additional Resources accordion.

**8. I'm adding service evidence to my Activities tab. I want to see more information about the event than is shown on the screen.**

There is a "select columns" button that allows you to choose the visible information (i.e., the column headers). The default is date information, but you can add the name of the organization, the position you held, and other options. Adjusting the columns allows you to easily scan and edit the data.

**9. I want to see the current year on my yearly data screen.**

Yearly data moves forward and usually only needs to be updated if there was a change, for example, if you had a name change or a department/college change. Only the SRU WFS administrator can add a year in this area.

10. I **want to access evaluation letters from previous years to upload to my current report.**

You can find the documentation from past reviews in the History section of the Workflow tab. If you follow the row of any review to the right, you'll find an upside-down arrow. Clicking on that will give you the option to download a copy of the documentation.

**11. I can't link a video in my report.**

WFS limits individual files to 50 megabytes. One option is to transfer the video to a platform such as Kaltura or YouTube and then provide a link. Instructions for creating Kaltura or YouTube videos are on the [Center for Teaching and Learning (CTL) webpage](#).

**12. Uploaded documents do not appear in my report where I expected.**

a. Search the report (one way is to use control-F) with the document title to find its location. Document locations are hard-coded in the report and cannot be moved around.

## Creating a report

**13. I opened the application link in the WFS Activities tab but don't know what to do.**

Once you are in the application area, click on "add new." A new area will open where you can specify the Academic Year (the current academic year), the Applicable Type (review type such as probation or tenure), Evaluation Year for probation only, and add documents such as your narrative.

**14. I ran my report and the dates for my evidence are wrong or evidence is missing.**

a. WFS runs reports based on date ranges. Since WFS is a repository of information about your career at SRU, the dates allow the software to include items required in the review period. For example, if you are running a third-year probation report in 2022-23, the report will not pull information from your first year.
b. Check the dates on the artifact for errors. Make sure the dates fall in the range required for your report.
c. Required reports—probation, temporary review, tenure, fifth year post-tenure, RPT—have predetermined, APSCUF-approved dates that cannot be changed. Only activities falling in those date ranges are included. Date ranges appear at the top of the report.
d. Optional reports—sabbatical and promotion—require faculty members to set the date ranges in accordance with their own history. Check the local policy and procedure set for the milestone you are attempting (these can be found on the SRU Faculty Resources page in the Faculty Milestones accordion) and then verify with your department chair.
e. Check the evaluation year on your application (in the header information) to verify that the current year has been selected.

**15. I am applying for two milestones in the same year, for example, tenure and promotion. Can I use the same evidence document in both?**

a. As long as the document name and contents are the same/unchanged, you can use them in both reports.
b. If you want to replace a document that it is in an active report (e.g., I applied for promotion in November, but want to replace a document when I apply for tenure in January), caution is necessary. If you replace a document in an active report, you may break the link between the document and that report. If you want to make changes (in this example, for tenure), then save the changed document with a new name and use that new name in the second report.

16. **I'm having trouble running reports in the reports tab (on the green ribbon). I keep getting an error message.**
    a. The reports function defaults to PDF. Do not change it to Word. You can save the report as a PDF after you run it.
    b. Each page has an option on the right called Rapid Reports. Do not use this option because it does not run a full report and items will be missing. Use the appropriate report from the Reports tab.

**The review process**

17. **My Department Evaluation Committee or Department Chair asked me in person for additional documents but I can't see where to add them.**

    You will see your review in your WFS inbox when you need to act on it. If the review is not in your inbox, even though you may be able to open it you won't be able to add documents. Ask the DEC or Department Chair to return the review to you through Workflow.

18. **My review appeared back in my Workflow inbox with a request for additional documents by my Department Evaluation Committee or my Department Chair.**

    You will see the review in your WFS inbox with a note about necessary additional documents. Compile the documents in PDF format and drag and drop them in the additional documents area in Workflow. Return your review to the requester. <u>DO NOT RERUN THE REPORT</u>. There are two important reasons for not rerunning your report. First, rerunning the report changes the date stamps and your report will appear to have missed your deadline. Second, when the DEC or chair want to see specific documents, it's much easier for them to find them in the additional document section than it is to cull through the full report a second time.

19. **How can I respond to a letter from one of my reviewers?**

    According to the CBA and the local policies and procedures, faculty are able to respond in writing to each reviewer (DEC, Department Chair, and Dean/Associate Provost/Manager). Each reviewer will return the review to you, and you have the opportunity to acknowledge the letter and drag and drop an optional response in PDF form. You then move the review to the next reviewer.

**Additional questions or suggestions**

If you have questions not answered here or suggestions for additional content, please contact Mary Hennessey at 724.738.2171 or email at mary.hennessey@sru.edu.

Weekly drop-in Zoom sessions about WFS are held on Tuesdays at 9am at https://sru.zoom.us/j/99239594599.