

Portfolio Builder

Department Admin User Guide

User Guide

University of Pittsburgh | Health Sciences Information Technology

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Introduction

Purpose

Portfolio Builder supports the University of Pittsburgh School of Medicine portfolio review process. It keeps portfolio information, required documents, referee records, comments, and tracked changes in one place.
This Department manual explains how to create portfolio records, manage department materials, review issues, and submit portfolios to the next workflow step.

Why Use?

Use Portfolio Builder to work from one shared record instead of separate spreadsheets, multiple email threads, or file lists.
The application helps Department Admin users:

1. Create portfolio records for faculty in assigned departments.
2. Track active work from the Department Portfolios dashboard.
3. Review documents, referees, comments, and tracked changes.
4. Confirm validation before routing a portfolio forward.

Requirements

Department access is controlled by active User Role records in Portfolio Builder. A Department Admin sees portfolios only for departments assigned to that account.
Use Microsoft Edge, Google Chrome, or Firefox. Sign in with a Pitt account that has Department Admin access for the departments you support.
Department assignments control which records you can see. The application reads active User Role records for your Pitt username and shows portfolios whose Department ID is included in those assignments. If a portfolio is missing, verify your Department Admin access for that department before reporting a system issue.

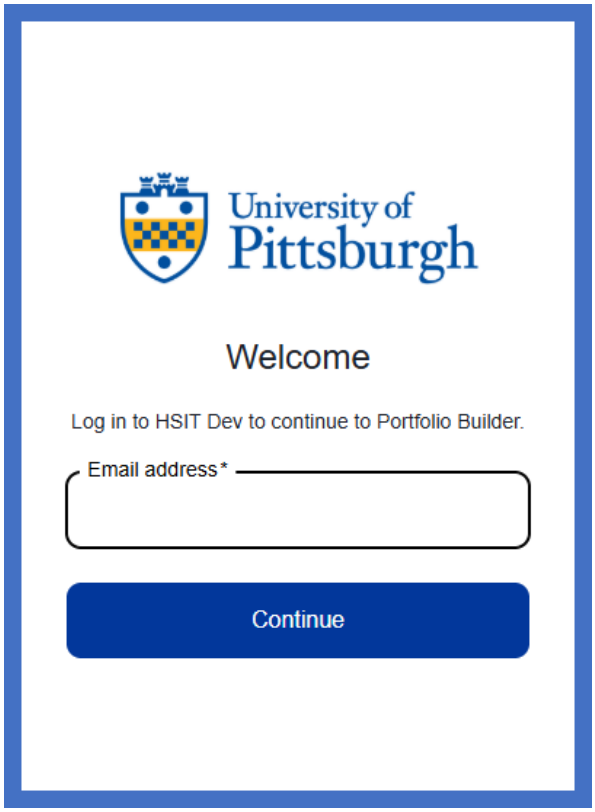
1. Supported browser: Edge, Chrome, or Firefox.
2. Required account: Pitt credentials with Department Admin access.
3. Required access: Active Department Admin assignments in Portfolio Builder determine visible portfolios.

Logging In

Open the Portfolio Builder URL and sign in with your Pitt account. After successful sign-in, the application checks your Portfolio Builder role and takes you to the Landing page.

To log in:

1. Open the Portfolio Builder URL in Edge or Chrome at: https://portfoliobuilder.hs.pitt.edu/
2. Enter your Pitt email address and select Continue to login or the available sign-in button.
3. Enter your Pitt credentials when prompted.
4. Complete the required authentication prompts.
5. Confirm that your name and Department Admin role appear in the application header.



How to get a sponsored account?

New faculty members with a future effective date or Affiliated Faculty members who do not have a Pitt email address will not be able to access Portfolio Builder until they have received a sponsored Pitt email account.

To grant access to Portfolio Builder for faculty without a Pitt email address (i.e. candidates not populating in the Faculty name search field):

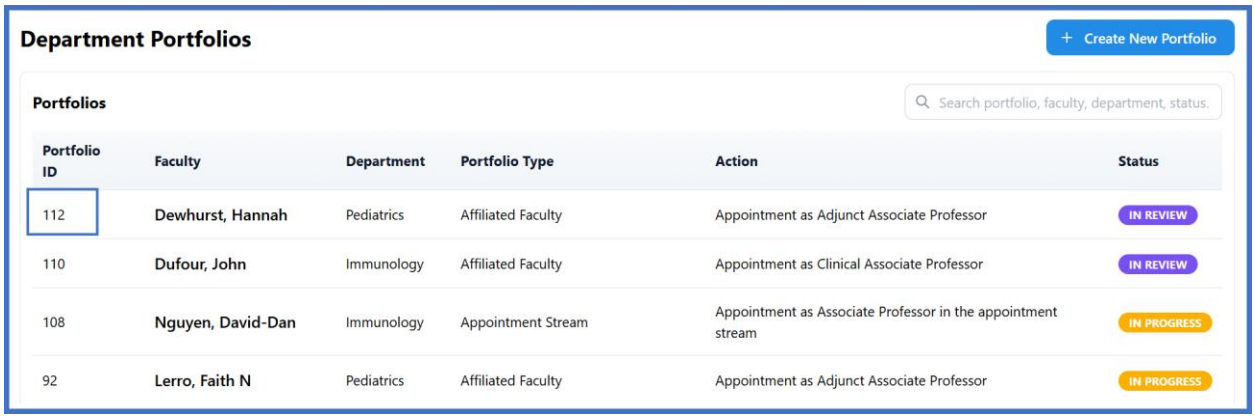
1. Departments will need to request a new sponsored email account for the faculty member.
2. A list of Accounts Administrators who can create sponsored email accounts can be found online at: services.pitt.edu
3. If you need additional assistance with getting a sponsored account for a faculty member please contact help@hs.pitt.edu or submit a Health Sciences IT Ticket.

After a sponsored email account is created the faculty member will have access to Portfolio Builder. Please allow 24 to 48 hours for the faculty member's account to be created.

Getting Started on Department Portfolios

Department Portfolios is the Department Admin landing page. Each row represents one portfolio in a department where your active Department Admin role is configured in Portfolio Builder. The list includes Portfolio ID, Faculty name, Department, Portfolio type, Action, and Status.

Use this page to review the portfolio list, confirm the status, and open the correct portfolio record. Each portfolio has a unique Portfolio ID, which helps identify the record when you search, review, or discuss a portfolio with another user.



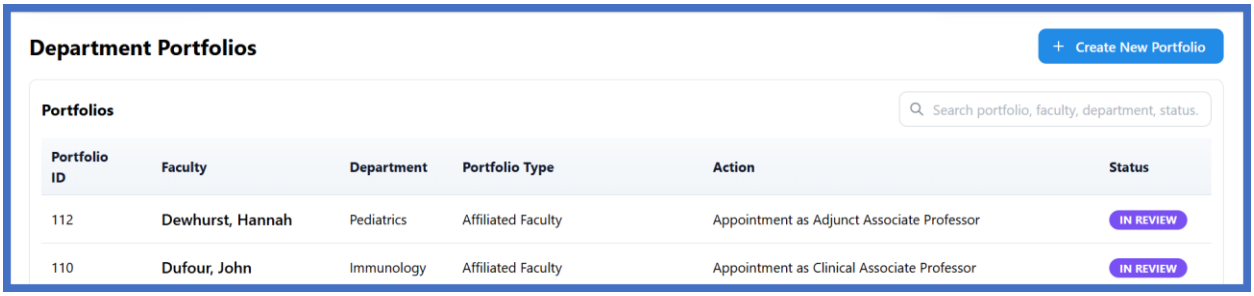
Highlighted area: Portfolio ID

Learn the Layout: Department Portfolios

The search box filters visible rows. The Create New Portfolio button starts a new portfolio. Page controls appear at the bottom of the table when there are more than 20 records on a page. Status badges identify whether a portfolio is in progress, in review, in revisions, closed, or withdrawn.

Select a row to open the portfolio workspace. Before opening, review the status so you know whether the portfolio is editable or in a review-only status.

1. Portfolio ID uniquely identifies the record.
2. Portfolio Type and Action determine requirements.
3. Status controls available actions.

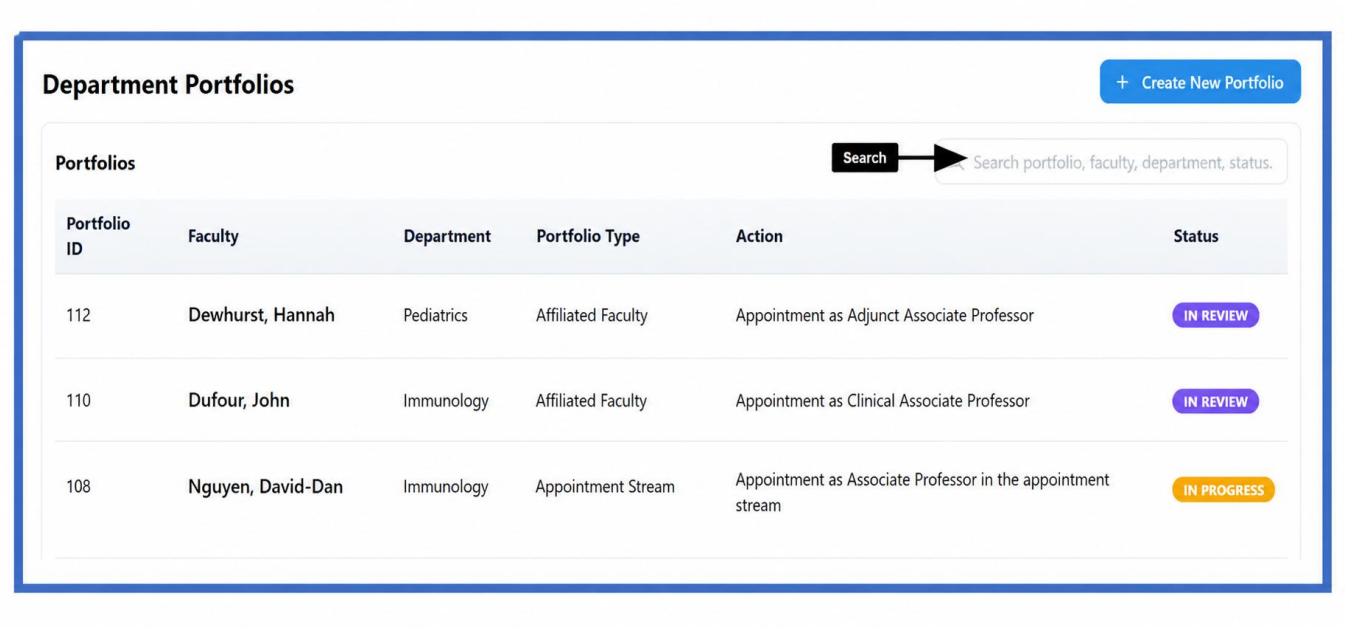


Highlighted view: Department Portfolios list layout.

How to Search for a Portfolio

Search is the fastest way to locate a record when the department list is long. Search can match Portfolio ID, Faculty name, Department, Portfolio type, Action, and Status.
If the expected portfolio does not appear, clear the search and try a broader term such as the Faculty Last Name or Portfolio ID.

1. Place the cursor in the Search field.
2. Type a Portfolio ID, Faculty name, Department, Status, or Action keyword.
3. Review the filtered rows.
4. Select the correct row to open the portfolio.
5. Clear the Search field to return to the full list.



Highlighted area: Search field.

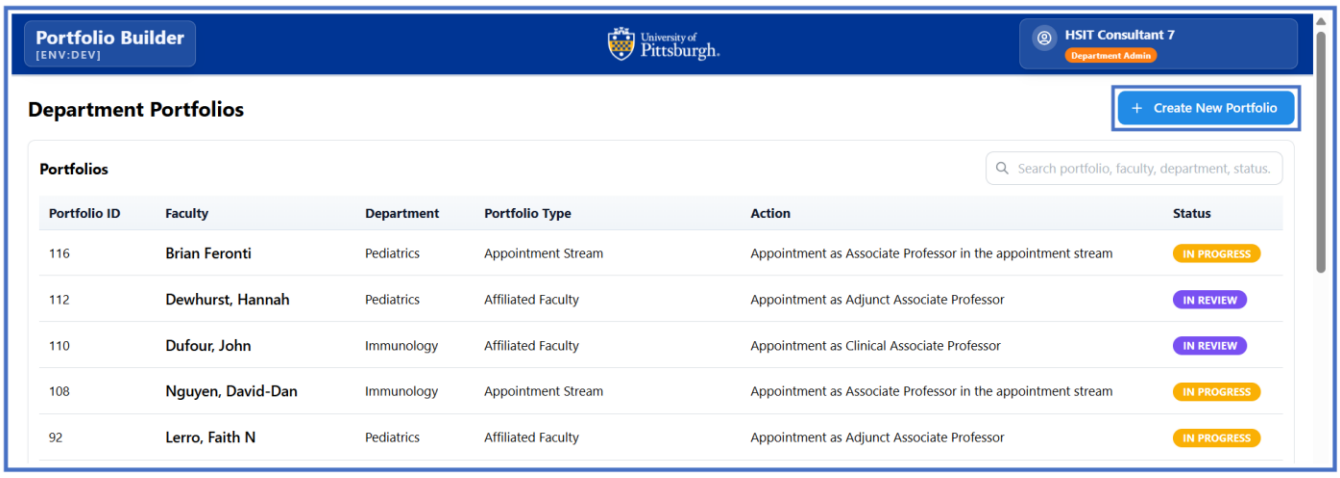
How to Create a New Portfolio

Portfolio Builder prevents a new active nomination when the same faculty member already has an open portfolio in any of the following statuses: In Progress, In Review, In School Review, In Review - Revisions, or In Progress - Revisions.

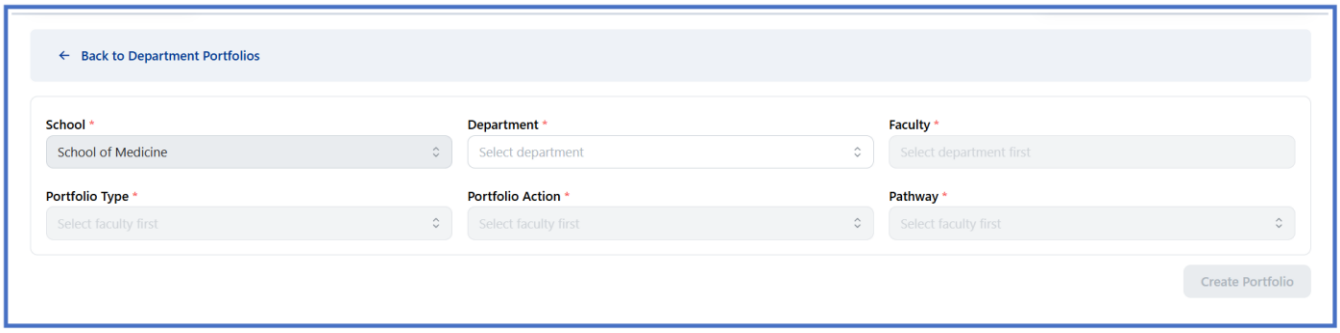
To create a new portfolio:
1. Select Create New Portfolio on the Department Portfolios page.
2. Portfolio Builder opens the create form.

Caution: Once the intended faculty member has been selected, it is extremely important to select the correct Portfolio Type and Portfolio Action. Once these options have been selected and saved the fields are locked and changes would require the portfolio to be withdrawn and the department and faculty member to start over.

3. Complete the required fields on the creation form.
4. Create Portfolio button becomes active after all the fields are selected and you can click on it to complete creation of a portfolio.



Highlighted area: Create New Portfolio button.



Highlighted area: Create Portfolio form.

How to Open a Portfolio

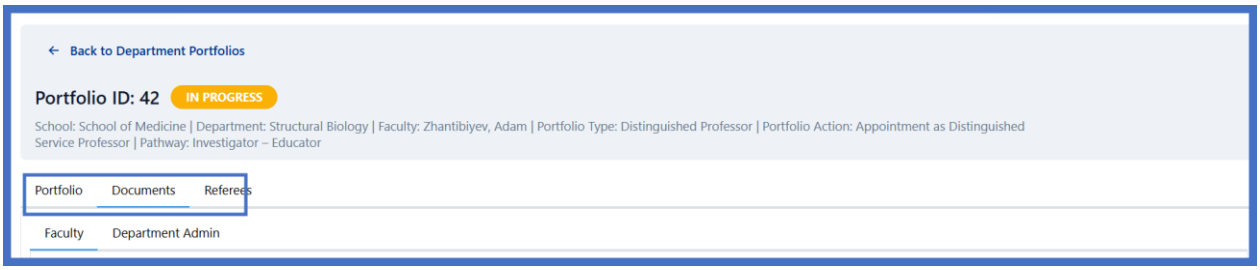
Open a portfolio by selecting its row from Department Portfolios. The application opens the workspace for that Faculty member and Portfolio ID.
Always confirm the Portfolio ID and Faculty name in the status bar (explained in next page) before editing documents, referees, or status.



Highlighted area: Portfolio row.

Learn the Layout: Portfolio Workspace

The workspace has a Back to Department Portfolios button, a compact status bar and tabs for Portfolio, Documents, and Referees. The footer shows Save when changes are staged and submit when the portfolio is eligible for a workflow transition.
Use the tabs to focus on one type of work at a time. Save changes before switching tasks or submitting.

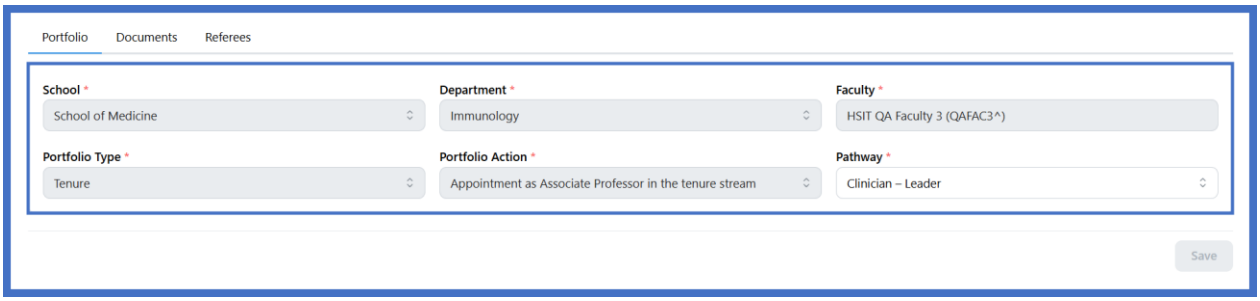


Highlighted area: Department Admin Tabs

How to Use the Portfolio Tab

The Portfolio tab displays faculty, school, department, portfolio type, action, pathway, and award (when applicable). Department Admins use this tab to verify setup and confirm the correct requirements are being applied.

Important Note: Most metadata are read-only after creation. Only pathway can be edited by Department Admin once the information on this page has been saved.

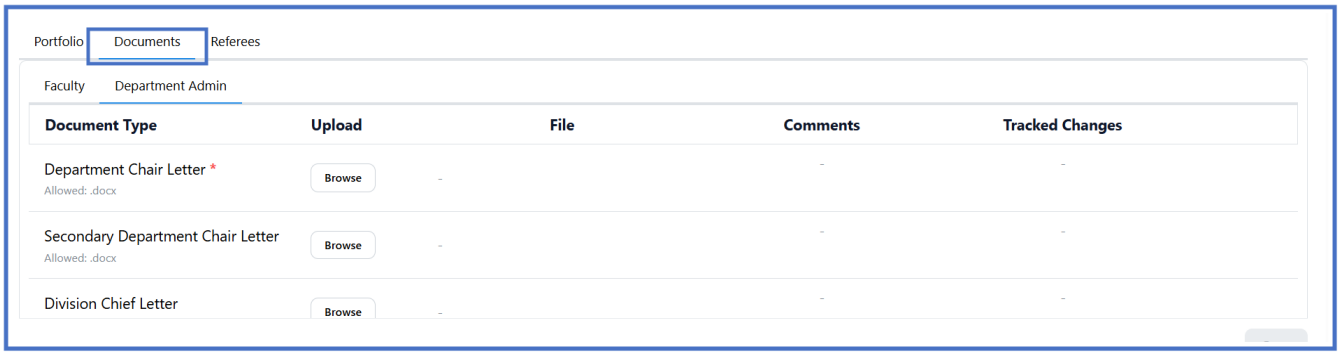


Highlighted area: Portfolio Tab

How to Use the Documents Tab

The Documents tab shows the rows of acceptable documents for the selected portfolio type and action. Required rows must meet the configured minimum number of files, and multi-file rows cannot exceed the configured maximum.
Each row shows document type, allowed file extension, upload action, uploaded file, comments, tracked changes, and available actions.

1. Select Browse to upload a document.
2. Select Replace to replace the previously uploaded document with an updated version.
3. Select Add to create another row when multiple files are allowed.
4. View or View/Edit opens the Document Comment details.
5. Select Save to Save your uploads and/or document changes.

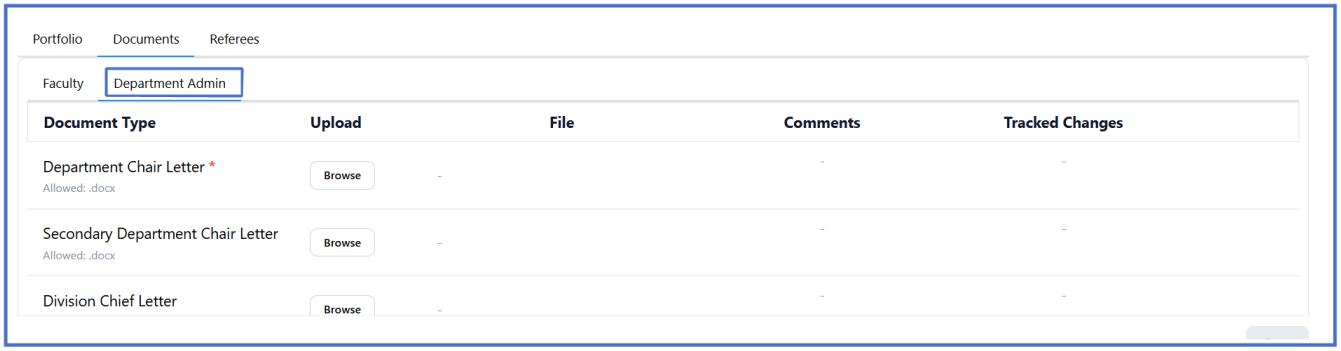


Highlighted area: Documents Tab

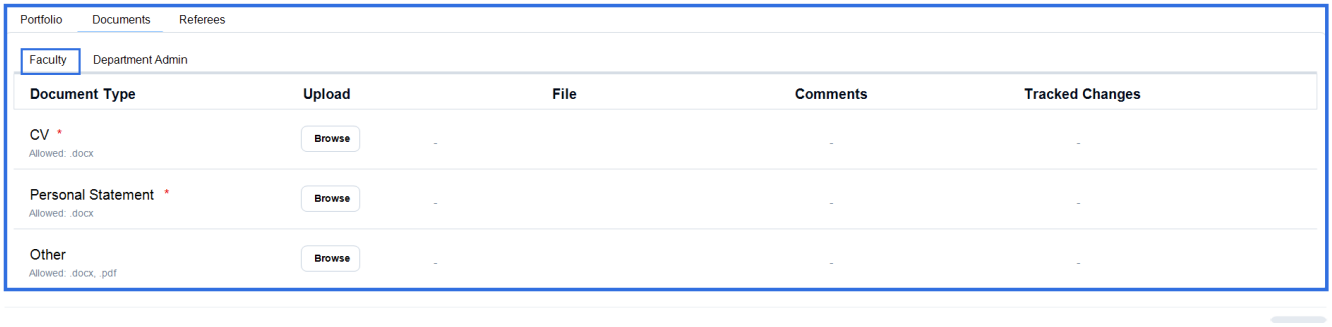
Document Tab Visibility by Role

Department Admin users see both document ownership tabs on the Documents page: the faculty tab and the Department Admin tab. Use the Faculty tab to review or assist with faculty-owned materials and use the Department Admin tab for documents owned by the department workflow.
Note: You have the ability to view and upload documents under the Faculty tab on behalf of the faculty member.

If a faculty user reports that the Department Admin tab is missing, that is expected behavior for the faculty role.



Highlighted area: Department Admin Tab



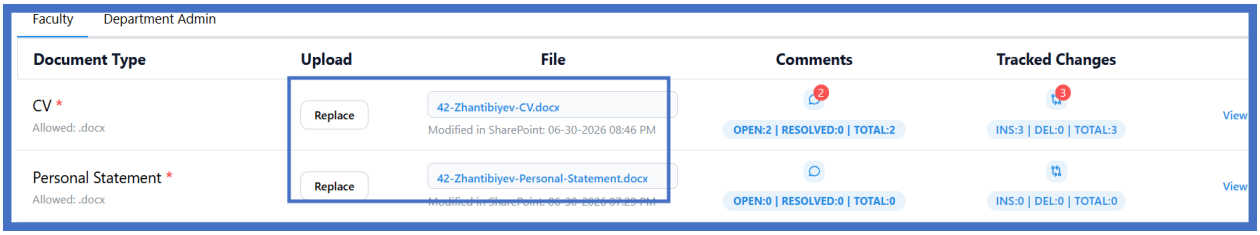
Highlighted area: Faculty Tab

How to Upload or Replace Documents

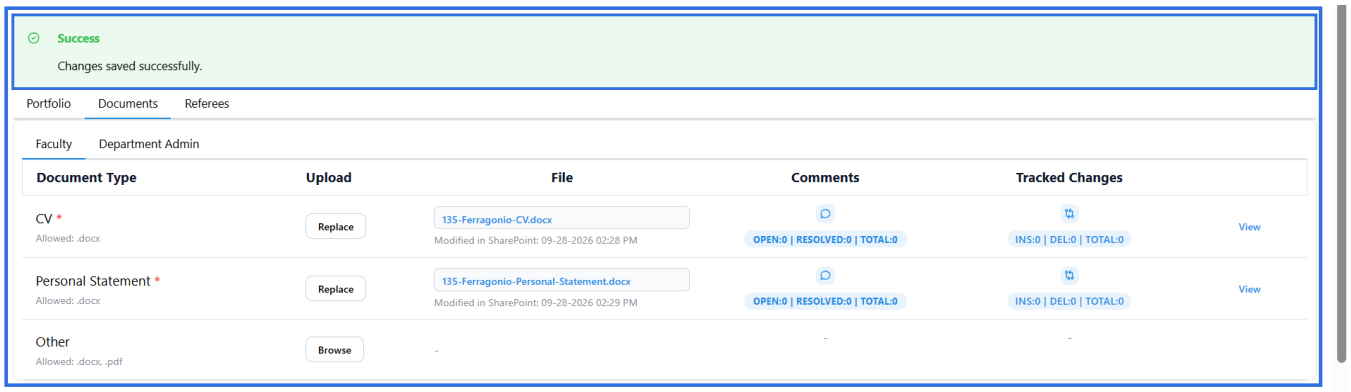
Note: All portfolio documents MUST be uploaded into Portfolio Builder ONLY.

Upload files only into the row that matches the document type. The application validates the allowed extension shown under the document name.
Replacing a file sets the new version. However, the file is not final until Save is selected and the save is completed.

1. Open the Documents tab.
2. Check the allowed file extension.
3. Select Browse or Replace.
4. Choose the file from your computer.
5. Select Save and wait for confirmation as shown in the second image below before leaving the page.



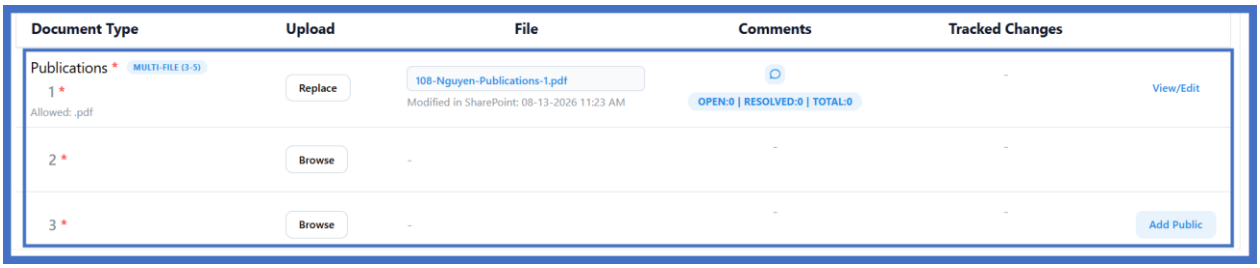
Highlighted area: Upload/Replace documents



Highlighted area: Saved Changes

How to Manage Multi-File Document Types

Some document types allow more than one file. These rows display a multi-file range or numbered rows. Use Add only when another file of that same document type is needed.
Do not place unrelated documents in open multi-file rows. Keep every upload aligned to the displayed document type.

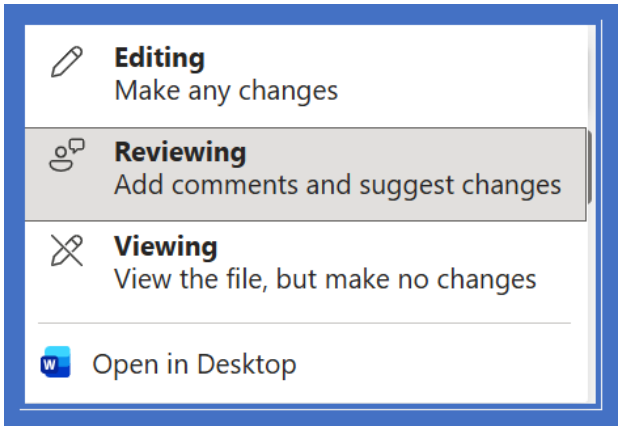


Highlighted area: Multi-file document type example

Word Document Modes and Open in Desktop

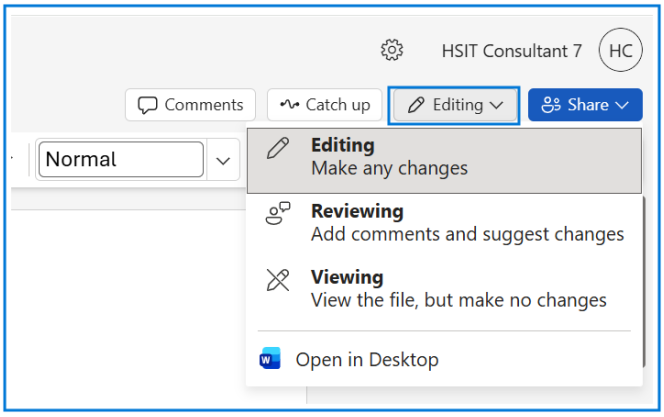
Word documents opened from Portfolio Builder may use Word for the web. The mode menu controls what can be done in the document.

1. Use **Editing** when you want to make direct changes to the document text, formatting, or content. These changes become part of the document immediately.
2. Use **Reviewing** when you want to suggest changes or leave comments for someone else to review before they are accepted.
3. Use Viewing when the file should be read only.
4. Select Open in Desktop when the document needs the full Microsoft Word desktop application.



Highlighted area: Word mode menu and Open in Desktop option.

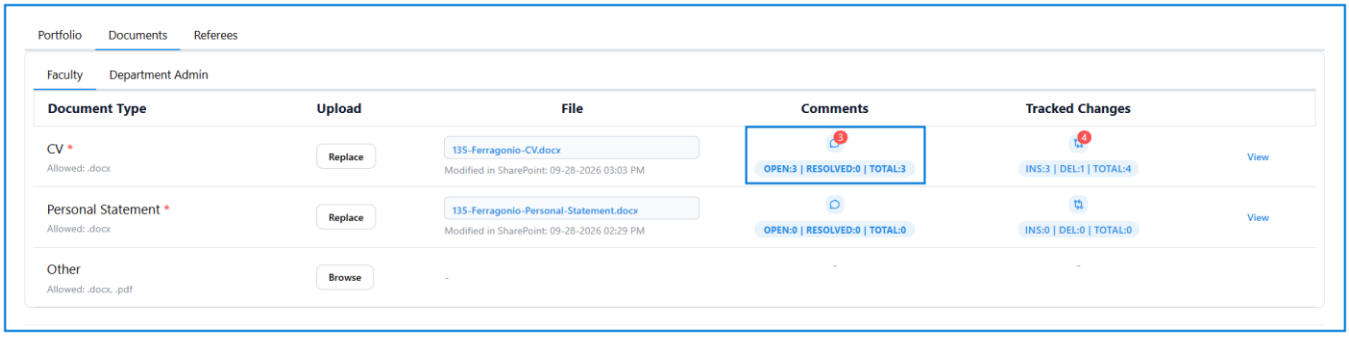
To find the Word mode menu controls, look at the top-right area of Word for the web, next to the Catch up button and before the Share button. The current mode appears as a button, such as Editing, with a small dropdown arrow. Select this dropdown to switch between Editing, Reviewing, and Viewing, or to choose Open in Desktop when the document needs to be opened in the full Microsoft Word desktop application.



Highlighted area: Word mode menu dropdown

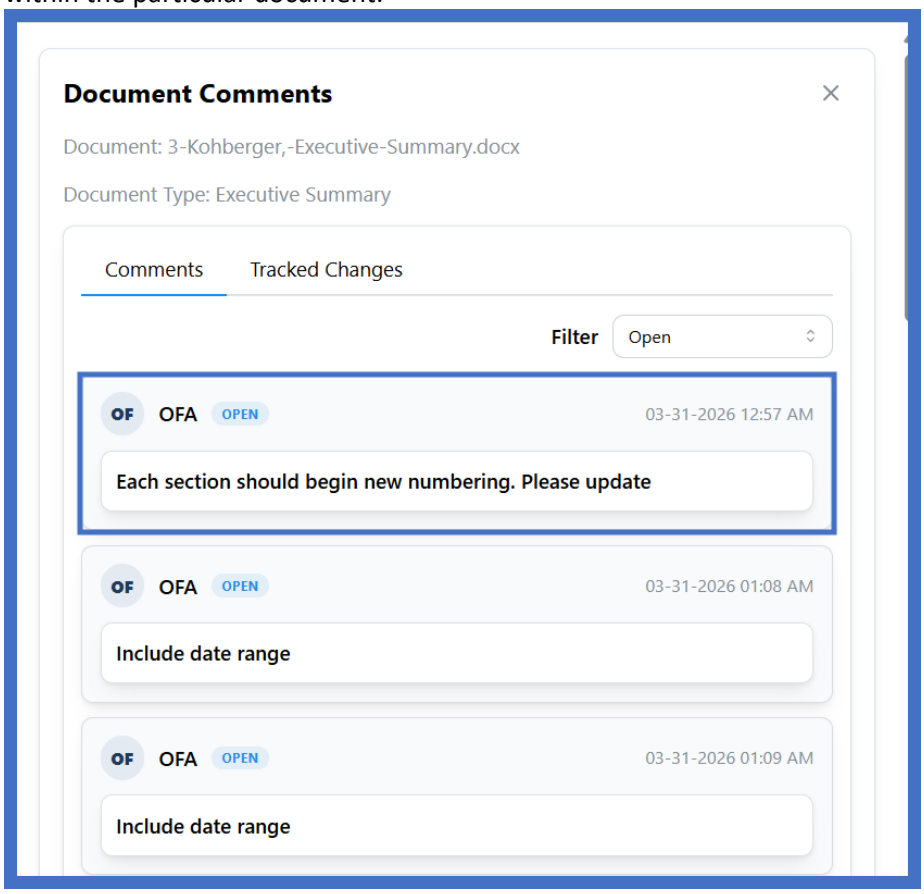
How to Review Comments

The Comments column summarizes open, resolved, and total comments. Use this area to review and respond to comments. Comments need to be resolved within the Word document in order to submit a portfolio. Open comments block validation and prevent users from progressing the portfolio.



Highlighted area: Comments

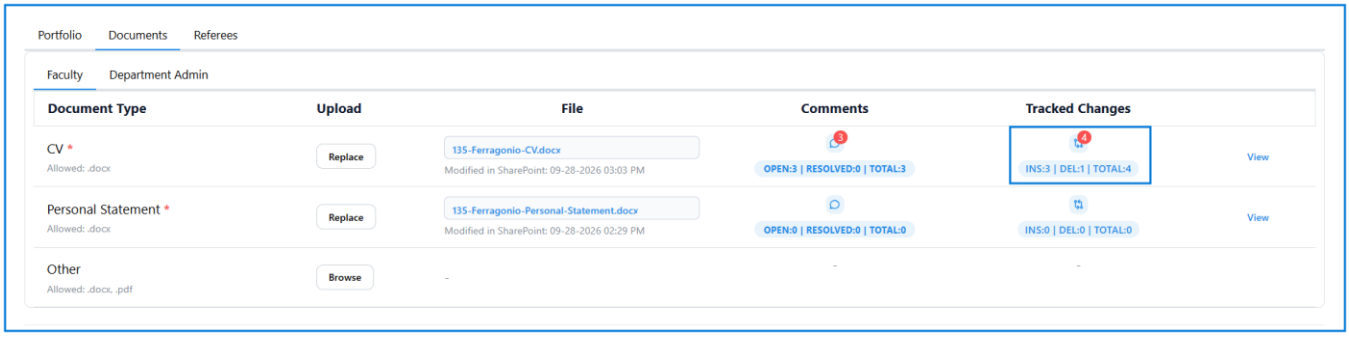
Select View or View/Edit to open issue details for a particular document. The available action depends on document type, owner role, current role, and status. For Word documents these issues can also be reviewed within the particular document.



Highlighted area: Comment list.

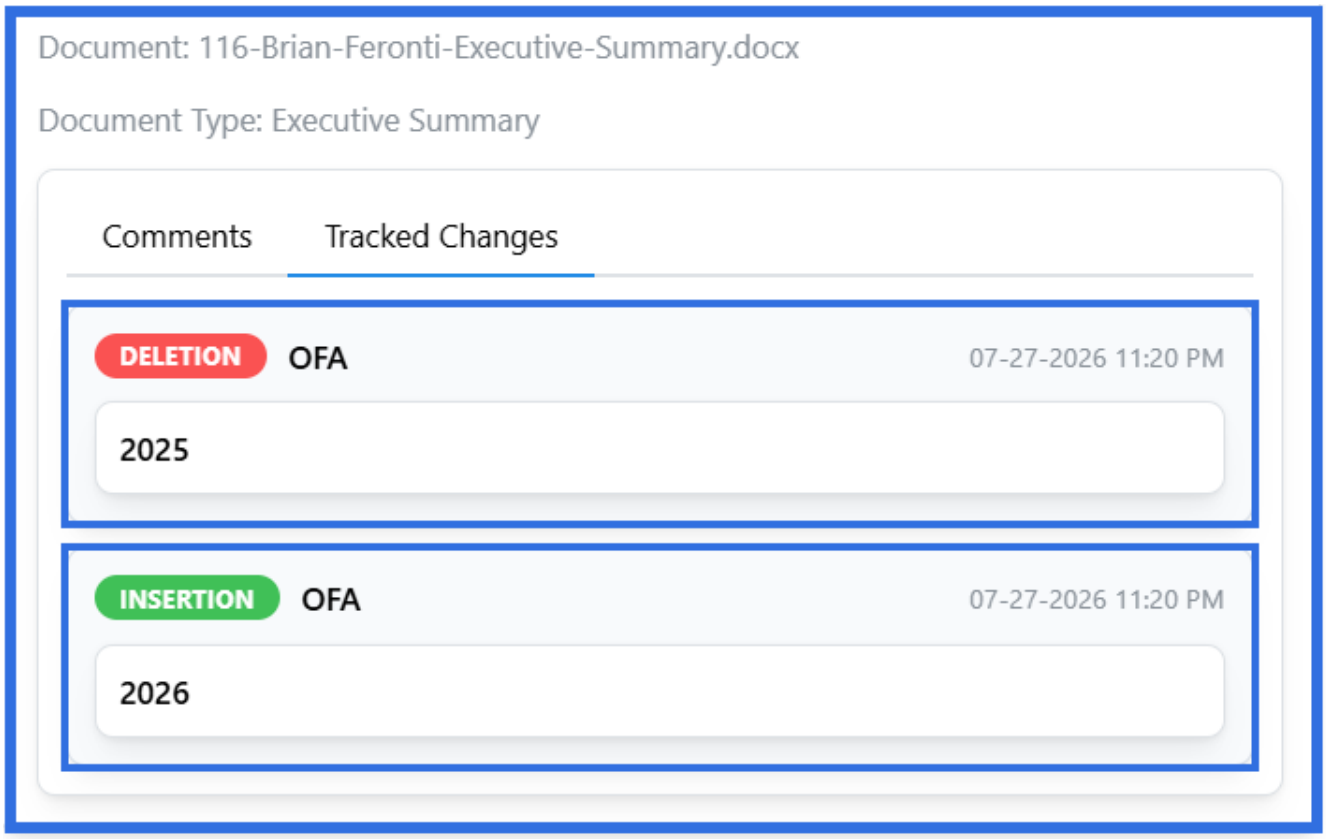
How to Review Tracked Changes

Tracked insertions or deletions in active Word documents block validation until the Word file is cleaned up. Word documents may show tracked additions, tracked deletions, and total tracked changes. These indicators help Department Admins confirm whether Word files still need cleanup.



Highlighted area: Tracked changes

If tracked changes must be cleared before submission, open the document, resolve the changes by accepting or rejecting the tracked changes. Alternatively, a corrected version can be uploaded.



Highlighted area: Tracked changes list view

How to Review Comments for Non-Word documents

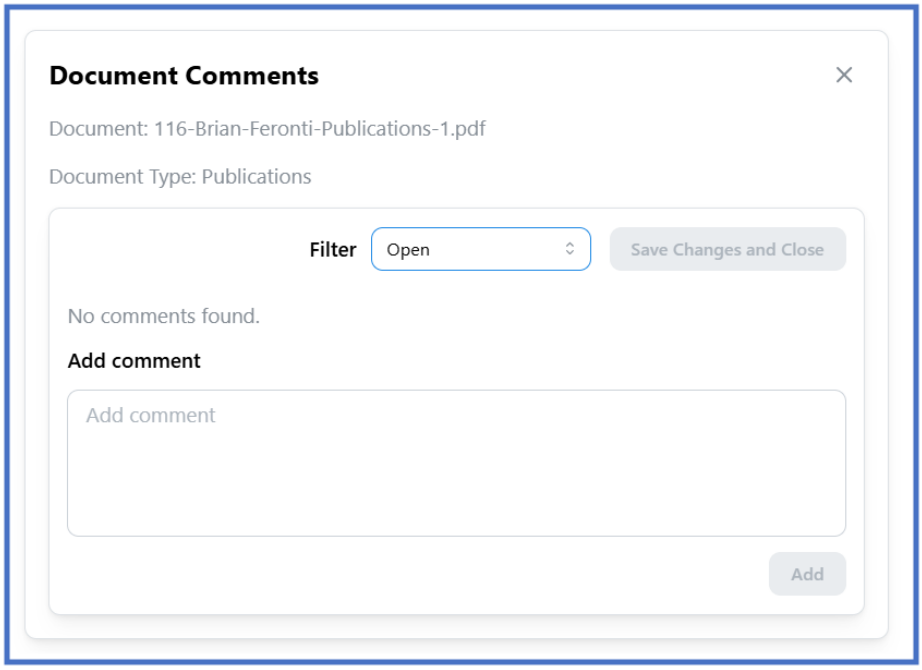
For non-Word files such as PDF documents, comments are managed directly in Portfolio Builder. These are PDF or XLSX files, not Microsoft Word. They are saved in the application and displayed in the Document Comments drawer.

To work with non-Word comments:

1. Open the Documents tab.
2. Select View/Edit to add or view comments for the non-Word documents.
3. Use the Filter list to view Open, Resolved, or Total comments.
4. Type a new comment in the Add comment box.
5. Select Add to stage the comment.
6. Select Save Changes and Close to save the comment changes.

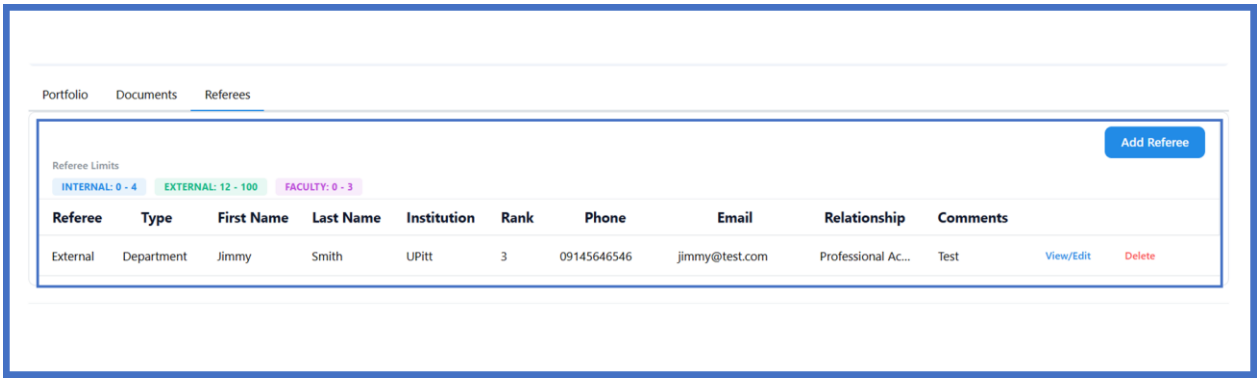
Users can also reply to an existing comment when reply actions are available. Replies appear under the original comment as a threaded conversation.

A comment can be marked Resolved when the issue has been addressed. A resolved comment can be reopened if more work is needed. Delete removes the comment item from the saved comment snapshot after confirmation.



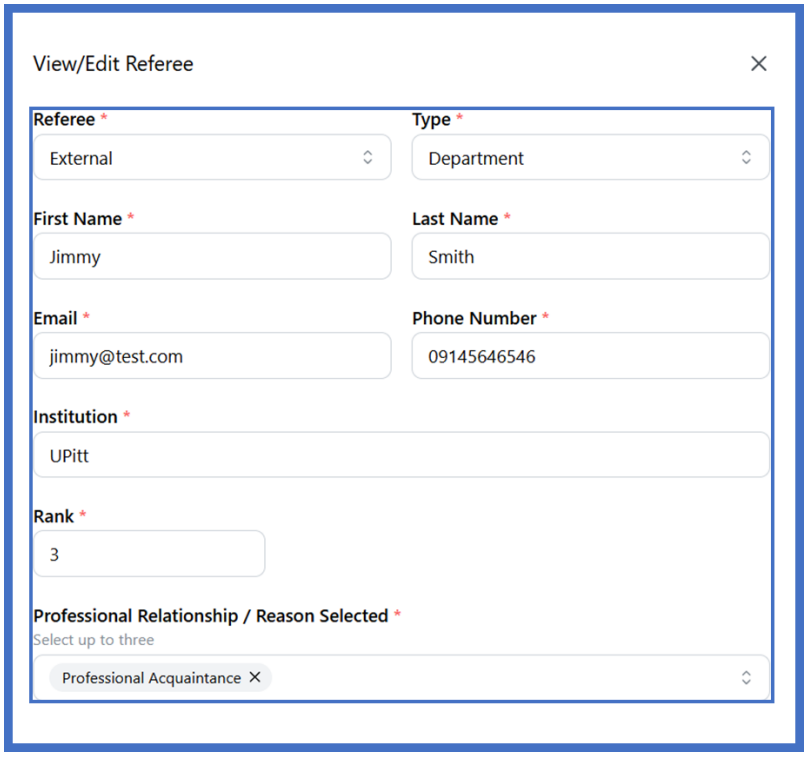
How to Use the Referees Tab

The Referees tab shows referee limits, existing referee records, and actions that are available for the current portfolio status. Department Admin users use this page to review referee completion and fill in remaining referee information in order to meet the required referee requirements.
Use this tab before submission to confirm that referee requirements are satisfied for the portfolio type and action.
To review referee information:
1. Open the Referees tab.
2. Review the Referee Limits at the top of the page.
3. Confirm each existing referee row shows type, name, institution, rank, phone, email, relationship, and comments.
4. Select View/Edit to review or update an existing referee record when editing is available.
5. Select Add Referee when another referee is required and the button is available.
6. Use Delete only when an incorrect referee should be removed before review submission.
7. Once a portfolio has been submitted to In School Review status, the referees cannot be deleted. You will need to contact OFA to see if the referee request has already been sent out.



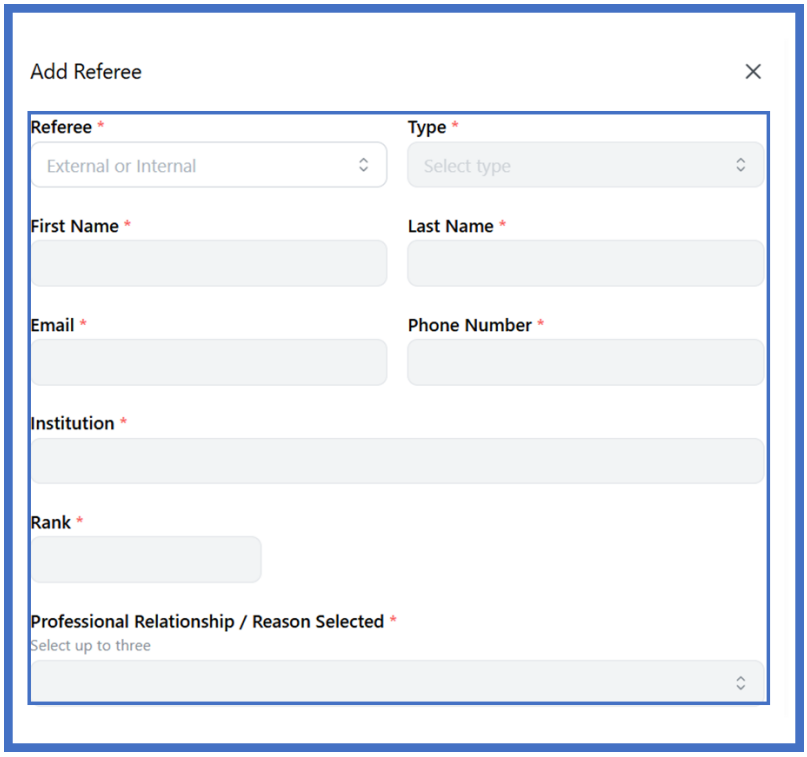
Highlighted area: Referee limits and referee list.

Use View/Edit to open an existing referee record. Required fields are marked with an asterisk. Relationship selection allows up to three values, and Other requires an explanation when selected.



Highlighted area: View/Edit Referee form.

Use Add Referee to create a new referee record. Complete all required fields, choose the relationship or reason selected, add comments if needed, and save before leaving the page.



Highlighted area: Add Referee form.

Referee Limits and Department Completion

The system enforces configured minimum and maximum counts for Internal, External, and Faculty suggested referee categories. A duplicate referee email cannot be saved for the same portfolio.
Referee limits are configured by portfolio type and action. The application displays minimum and maximum counts for internal, external, and Faculty/Candidate suggested referees on the Referees tab. Although, faculty suggested referees and internal referees are optional there is a limit on how many of these referee names can be submitted.

1. Review the referee limit badges before submitting.
    a. Internal and external counts must stay within the configured ranges.
    b. Faculty referee counts must also meet the configured candidate minimum and maximum counts.
2. After Faculty users have completed their optional referee entries, the Department Admin must add the remaining required referee names to meet the minimum total referee requirement.
    a. Use the Referees tab to identify missing categories or incomplete records.
    b. Add or edit referee information until the internal, external, and Faculty thresholds are satisfied.
    c. Save referee changes before attempting to submit the portfolio.
3. Portfolio Builder prevents submission when referee counts are below the minimum or above the maximum allowed range.

Validation of a portfolio

Validation runs in order: required documents, comments and tracked changes, then referee counts. If any step fails, the next workflow Submit option may not appear.
Portfolio validation should be reviewed before submitting a portfolio to the next workflow stage. Validation confirms that required documents, referee information, and workflow conditions are complete enough for review.

Document Validation

Document Validation checks whether the required document rows have an acceptable file uploaded and whether the file type matches the allowed format for that document type.
Required document rows are marked with a red asterisk.
Allowed file types appear under each document name, such as .docx, .pdf, or .xlsx.
If a required file is missing, upload the file before submitting the portfolio.
If a file needs correction, replace the document and save the change before continuing.

Referees Validation

Referees Validation checks whether referee information satisfies the requirement for the portfolio type and action. Referee limits are configured by portfolio type and action. The application displays minimum and maximum counts for internal, external, and Faculty referees on the Referees tab.

If referee thresholds are not met, the portfolio should remain in progress until the referee entries are complete.
Review the Referees tab for missing names, email addresses, or required referee categories.
Confirm that the required number of referees has been entered when the portfolio workflow requires referees.
Resolve referee validation issues before using the submit or status transition action.

Tracked Changes and Submit Button Availability

Word documents must have no remaining tracked changes before the portfolio can be submitted. If tracked changes are still present, the Submit button may not appear even when other required fields, documents, and referees are complete.

Open the Documents tab and review the Tracked Changes column for each Word document.
Open the comments drawer or Word document to review insertions and deletions.
Accept, reject, or otherwise resolve tracked changes in Word, then save the updated file.
Return to Portfolio Builder and confirm that tracked-change counts are cleared before looking for the Submit button. You may need to refresh your browser to clear the log.

Comments and Submit Button Availability

Documents must not have unresolved comments when the portfolio is ready for submission. If open comments are still present, the Submit button may not appear even when required fields, documents, and referees are complete.

1. Open the Documents tab and review the Comments column for each document.
2. Select the comments icon or comment count to open the Document Comments drawer.
3. Review all open comments.
4. Resolve each comment after the requested update or clarification is complete.
5. Save the comment changes, if the drawer provides a save option.
6. Return to Portfolio Builder and confirm that open comment counts are cleared before looking for the Submit button. You may need to refresh your browser to clear the log.

Review Submission and Edit Locking

Allowed status transitions are read from the workflow configuration for the status, validation result, and signed-in user role. Status changes are audited and notification emails are sent after a successful transition.
After a portfolio is submitted to a review status, Portfolio Builder changes what users can edit. The lock behavior comes from the current portfolio status and the user role, so documents and referees can behave differently.

In Progress and In Progress - Revisions: Faculty and Department Admin users can edit the areas they are permitted to maintain. Document uploads, replacements, and referee edits are available to edit when one of these statuses are displayed.

In Review and In Review - Revisions: Faculty users and Department Admin users can review the portfolio, documents, comments, tracked changes, and referee information, but they cannot upload or replace documents or edit referees in these review-style states. If changes are required, the portfolio must be returned by OFA to In Progress or In Progress - Revisions before Faculty or Department Admin users can make updates. Once OFA has completed their review, the portfolio will either be returned to an In Progress status to allow for updates or the portfolio will move forward to the In School Review status.

In School Review: The portfolio is view-only for Faculty, Department Admin, and OFA users. Documents, metadata, and referees can be reviewed but not edited. No upload, replace, referee add/edit/delete, or metadata changes are expected in this status. Portfolios moved to the In School Review status are considered to have completed all requested updates and changes to move to the next portfolio review step.

Withdrawn or Closed: The portfolio is view-only. Active upload, replacement, referee add, referee edit, and delete actions are not expected or accepted.

What prevents Submit from appearing

Portfolio Builder checks for allowed status transitions. If no valid transition is available, the Submit button does not appear. Validation must pass first. Unsaved changes must be saved first. The footer shows Save for pending edits; Submit is hidden until the active tab has no unsaved changes and review counts have loaded.

Required document validation must pass. Required document rows must have at least the configured minimum number of uploaded files, and uploads must use an allowed file type.

Comments and tracked-change validation must pass. Open comments block submission. Tracked additions or deletions in Word documents block submission. Before submitting a portfolio, review the Documents tab for open comments and tracked-changes. The Submit action appears only when the portfolio passes validation including required documents, referee requirements, and any comment or tracked-change checks that apply to that status.

Referee validation must pass. Internal, external, and Faculty referee counts must be within the configured minimum and maximum thresholds for the portfolio type and action.

Revision Loop: In Progress - Revisions and In Review - Revisions

The revision loop is used when a portfolio has already been reviewed and is returned for clarification or updated documents during the In School Review process. The two revision statuses show where the portfolio is in that correction cycle. These revision statuses show where the portfolio is in that correction cycle and help users understand whether updates are still being made or are ready for another review.

1. **In Progress - Revisions** means the portfolio has been returned for updates.
a. Faculty and Department Admin users can make permitted updates while the portfolio is back in this status.
b. Update only the documents, comments, tracked changes, metadata, or referee information identified by the reviewers feedback.
c. Save all changes before attempting to route the portfolio forward again.

2. After corrections are complete, the Department Admin submits the portfolio back into review.
a. Submit appears only after required documents, referee thresholds, comments, tracked changes, and unsaved-change checks pass.
b. The next review status is typically In Review - Revisions.

3. **In Review - Revisions** means the requested portfolio revisions are being reviewed by OFA.
a. Documents may be visible for review, but referee editing remains locked for Department Admin and Faculty users in review-style states.
b. If reviewers request more changes, the portfolio may return to In Progress - Revisions.
c. If review is complete, the portfolio can move forward according to the allowed workflow transition.

Returning to Work After Revisions

When a portfolio returns for revisions, start by reviewing status and issue indicators. Revisions usually require targeted updates, not replacement of every document.
Coordinate with Faculty or OFA as needed, save updated materials, confirm issue counts, and submit again when the portfolio is ready.



14	Brodecki, Michael	Pediatrics	Affiliated Faculty	Appointment as Adjunct Professor	IN PROGRESS - REVISIONS
13	McCarthy, Tessa	Pediatrics	Affiliated Faculty	Appointment as Adjunct Professor	IN REVIEW - REVISIONS

Highlighted area: Status column.

How to Submit a Portfolio - At a Glance

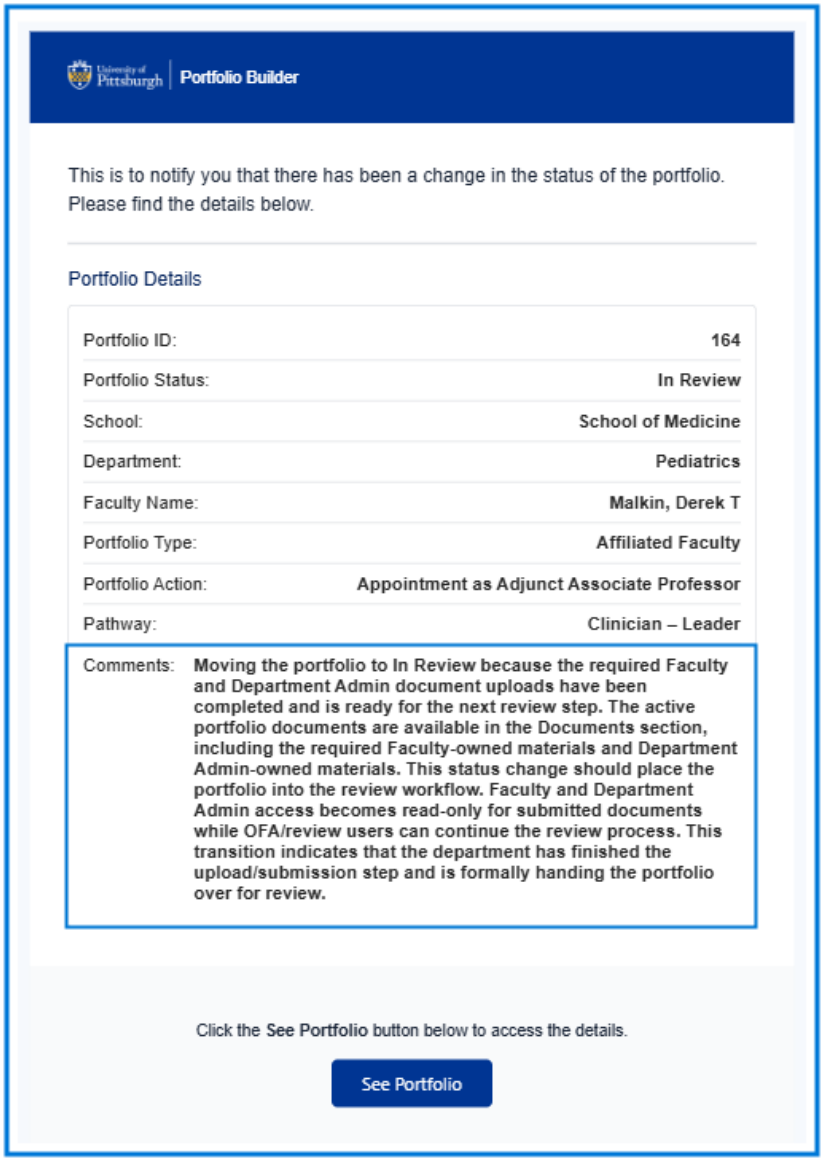
To submit a portfolio:

1. Save all active changes.
2. Confirm required documents are uploaded.
3. Confirm referee limits are met.
4. Confirm open comments and tracked changes are cleared.
5. Select Submit.
6. Choose the next status.
7. Enter a reason if required.
8. Select Confirm.

Email Notifications

Portfolio Builder sends email notifications when important portfolio events occur. Notifications help Department Admins, Faculty, and OFA know when a portfolio has been created or when its status has changed. Department Admins may receive notifications when a new portfolio is created for a faculty member in their department or a portfolio status changes.

The notification email includes key portfolio details, such as Portfolio ID, status, school, department, faculty name, portfolio type, portfolio action, pathway, and award when applicable. If a reason or comment was entered during the status change, that comment may also appear in the email.



Troubleshooting and Help

- If a faculty member's portfolio does not exist in the application, they may not be assigned to the correct department. Please confirm that they are assigned to their appropriate department.

- If the Submit button is not visible, the portfolio may have missing information or unsaved changes. Please verify that the portfolio does not have:
  - Unsaved changes
  - Missing required documents
  - Missing referees
  - A number of referees outside the allowed referee limits
  - Open comments
  - Tracked changes

- If you have difficulty accessing Portfolio Builder, or if you are receiving errors regarding your permissions, please contact HS Help at hshelp@pitt.edu. In your message, please include:
  - Your name
  - Your portfolio ID (if known)
  - Your browser
  - A description of the issue
  - Screenshots of the issue
  - Steps you followed to produce the issue

Terms and Definitions

Term	Definition
Portfolio	A single review record for one faculty appointment or action. The portfolio brings together setup details, required documents, referee information, comments, tracked changes, validation, and status.
Portfolio ID	The unique number assigned to a portfolio. Use this ID when searching, communicating with support, or confirming that you opened the correct record.
Status	The workflow state of the portfolio, such as In Progress, In Review, In Progress - Revisions, In Review - Revisions, In School Review, Withdrawn, or Closed.
Portfolio tab	The workspace area used to review portfolio setup details, such as faculty, school, department, portfolio type, action, pathway, and award information.
Documents tab	The workspace area used to upload, replace, view, and review required portfolio documents.
Referees tab	The workspace area used to add, edit, view, or review referee information and confirm that referee limits are satisfied.
Referees	Internal or external referee suggestions associated with portfolio review requirements. Required referee limits and relationship rules must be satisfied before submission.
Comments	Review notes associated with a document. Open comments must be resolved before the portfolio can move forward when validation requires a clean submission.
Tracked Changes	Tracked insertions or deletions in a Word document. These must be reviewed and cleared when the workflow requires a final clean document.