

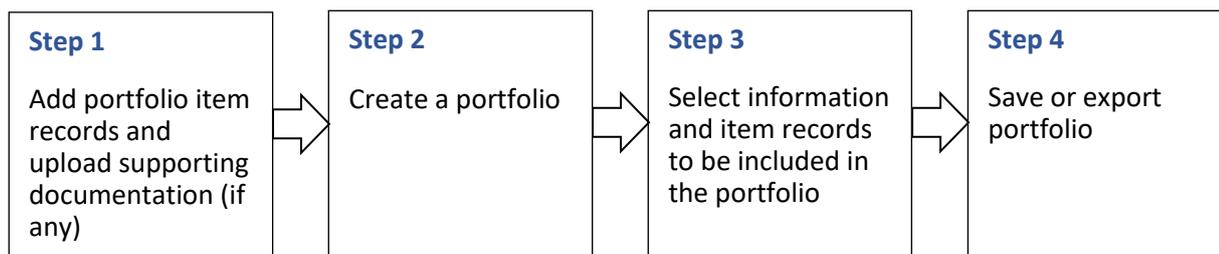
PolyU Teaching ePortfolio System User Manual

Last updated: 13 June 2017

Overview of Teaching ePortfolio (eTP) system at PolyU

Recognising the need for a more comprehensive approach to teaching evaluation using a wider range of teaching evidence besides SFQ results, the University has developed the Teaching ePortfolio (eTP) system – in accordance with the University guidelines and documentation requirements for academic reviews given in *The 2011 Framework for Appointment, Promotion and Retention of Academic Staff* – to facilitate the documentation of teaching evidence in a systematic and efficient way for developmental and judgemental purposes. While not mandatory, staff members are strongly encouraged to use the eTP system to collect, collate and present a wide range of teaching evidence via a portfolio for demonstrating their teaching contributions and achievements.

The following diagram illustrates the four basic steps for creating a portfolio with the eTP system at PolyU.



Detailed information and instructions for each step above are provided in this user guide as follows:

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1. Accessing the system

1.1 Logging in

Go to <https://www.polyu.edu.hk/etp>. Type in your NetID and password, then click **Login**.

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Teaching ePortfolio System

User Guide

Login

Username yournetid

Password

Login

Microsoft Internet Explorer 11 or better is required.

1.2 Logging out

To log out of the system, click **Logout** on the top menu bar.

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Teaching ePortfolio System

User Guide

Home Personal Information Contents Portfolios Help Feedback Logout

Hello, welcome to eTP system!

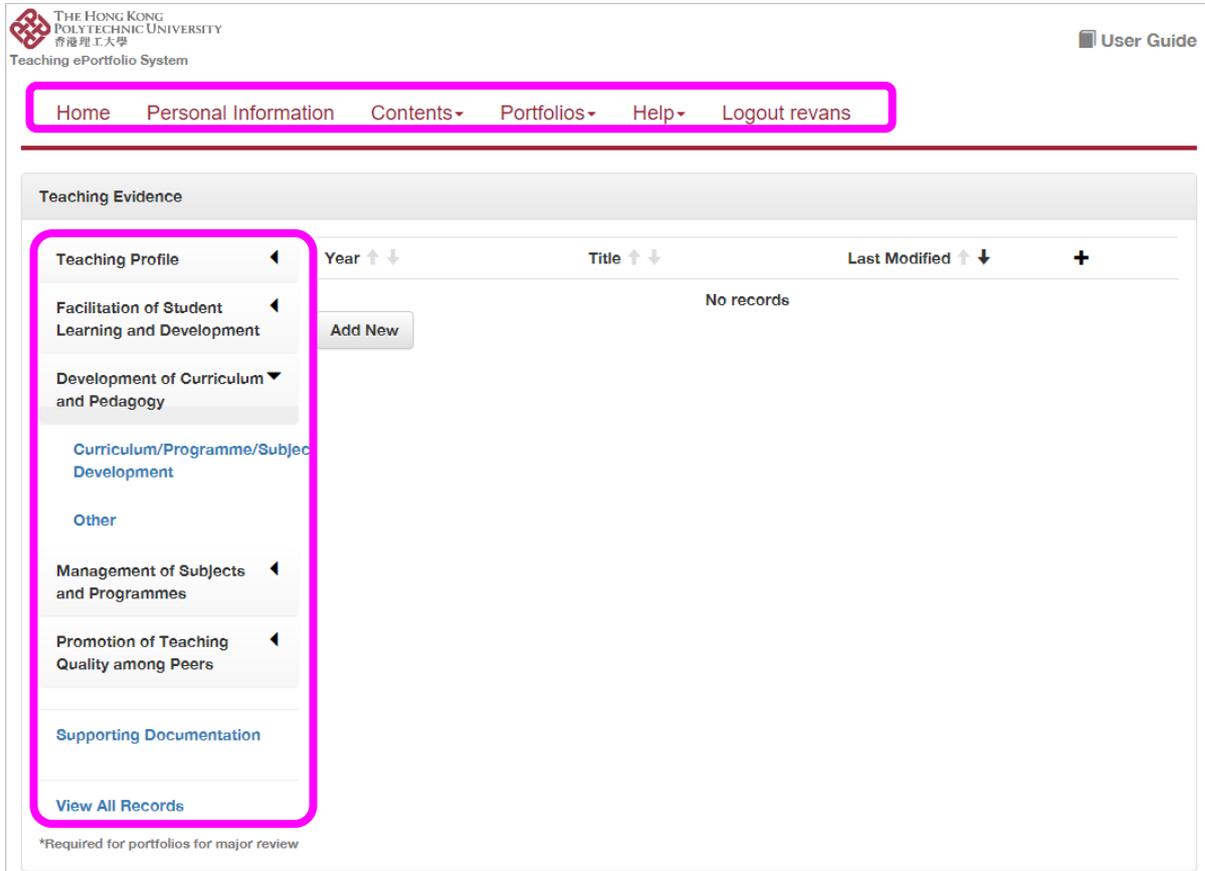
Overview of PolyU eTeaching Portfolio System

Recognising the need for a more comprehensive approach to teaching evaluation using a wider range of teaching evidence besides the SFQ results, the University has developed the Teaching ePortfolio (eTP) system in accordance with the University guidelines on teaching evaluation practices and documentation requirements for academic reviews set out in *The 2011 Framework for Appointment, Promotion and Retention of Academic Staff* to facilitate the documentation of teaching evidence in a systematic and

2. Navigating the system

2.1 Top menu bar and side menu

To navigate the system, use the top menu bar and the side menu (highlighted in the screen shot below). Click the **arrow**  to expand or collapse the menu.



The screenshot shows the 'Teaching Evidence' section of the system. The top navigation bar is highlighted in pink and includes 'Home', 'Personal Information', 'Contents', 'Portfolios', 'Help', and 'Logout revans'. The left sidebar menu is also highlighted in pink and lists various categories: 'Teaching Profile', 'Facilitation of Student Learning and Development', 'Development of Curriculum and Pedagogy', 'Management of Subjects and Programmes', 'Promotion of Teaching Quality among Peers', and 'Supporting Documentation'. The main content area displays a table with columns for 'Year', 'Title', and 'Last Modified', and a table with two rows of records. The 'Add New' button is visible next to the table.

2.2 Function buttons

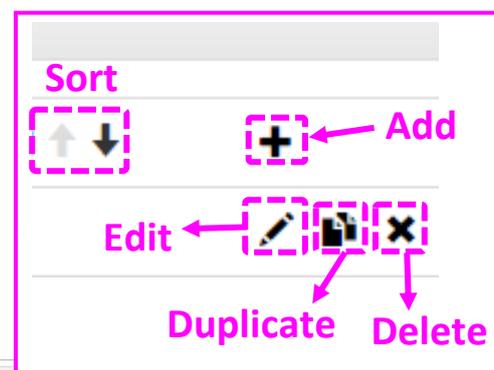
To add a record, click the **Add New button** or **plus icon** (+).

To edit a record, click the **pencil icon** (✎).

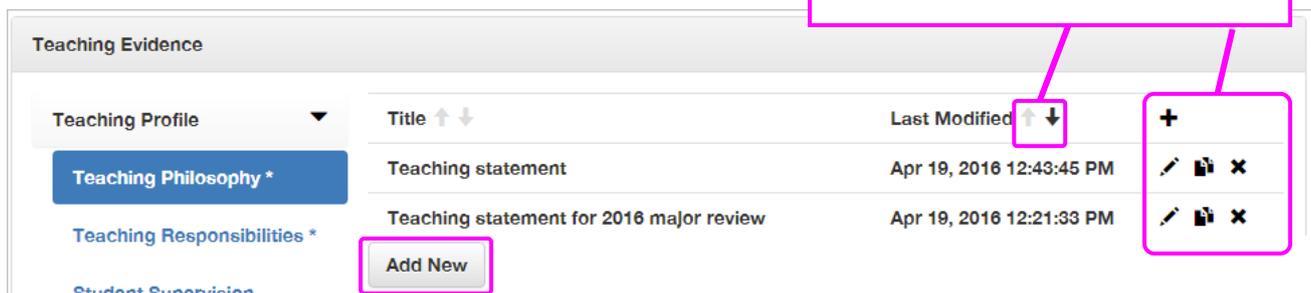
To duplicate a record, click the **copy icon** (📄).

To delete a record, click the **cross icon** (✖).

To sort the records in ascending and descending order, click the **upward and downward arrows** (↑↓) respectively in the column header.



The diagram shows a set of function buttons: 'Sort' (upward and downward arrows), 'Add' (plus icon), 'Edit' (pencil icon), 'Duplicate' (copy icon), and 'Delete' (cross icon). Arrows point from the text labels to the corresponding icons.

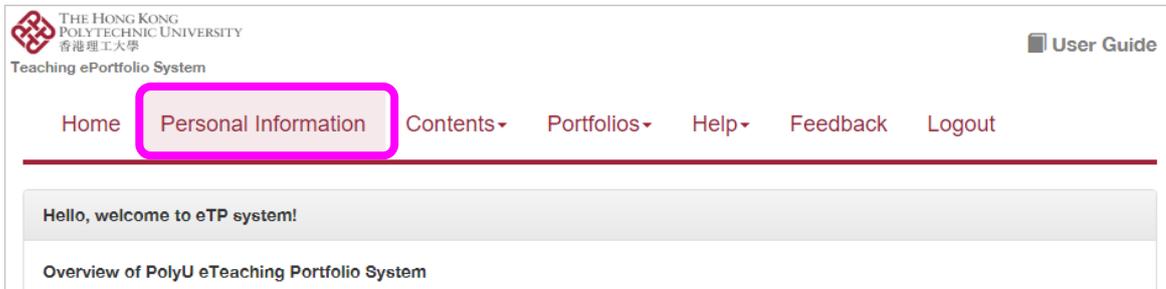


The screenshot shows the 'Teaching Evidence' table with two rows of records. The 'Add New' button is highlighted in pink. The 'Sort' button (upward and downward arrows) is highlighted in pink. The 'Add' button (plus icon) is highlighted in pink. The 'Edit' button (pencil icon), 'Duplicate' button (copy icon), and 'Delete' button (cross icon) are highlighted in pink.

3. Viewing your personal and appointment information

When you log in with your Net ID and password, relevant personal and appointment information is added to the eTP. You can view and check your personal and appointment information to see if it is accurate. If there is any discrepancy in your personal or appointment information, please contact eTP support for further assistance.

Step 1 To view your personal and appointment information, click **Personal Information** on the top menu bar.



Step 2 You can edit your *Readable Name* by clicking the **pencil button**  (Note: Readable name is the everyday name you used in the system). All other information is not editable. If there is any discrepancy in the displayed information, contact eTP support for further assistance.

Personal Information

NetID	hjekyll
Surname	Jekyll
Given Name	Henry
Readable Name	Dr Jekyll 

Appointment Information

Staff ID ↑ ↓	Appointment ID ↑ ↓	Post Title ↑ ↓	Dept ↑ ↓	Post Category ↑ ↓
A12345	9	Instructor	BME	ACA
A12345	8	Visiting Lecturer (Part-time)	RS	ACA

Step 3 To confirm your changes, click the **tick button** . To cancel, click the **cross button** .

Personal Information

NetID	hjekyll
Surname	Jekyll
Given Name	Henry
Readable Name	<input style="width: 100%;" type="text" value="Dr Who"/> <div style="display: flex; justify-content: flex-end; gap: 5px; margin-top: 5px;"> ✕ ✓ </div>

4. Managing portfolio items

Before you can create a portfolio, you need to add records to the portfolio items first. The portfolio items are grouped into five main sections as follows:

1. **Teaching Profile**
 - Teaching Philosophy*
 - Teaching Responsibilities*
 - Student Supervision
 - Reflection on My Teaching*
 - Enhancement Efforts*
2. **Facilitation of Student Learning and Development**
 - Peer Review Reports (Classroom Observation) *
 - Teaching Materials
 - Other
3. **Development of Curriculum and Pedagogy**
 - Curriculum/Programme/Subject Development
 - Other
4. **Management of Subjects and Programmes**
 - Programme/Subject Management
 - Committee Work
 - Other
5. **Promotion of Teaching Quality among Peers**
 - Teaching Development Projects
 - Action Research on Teaching Innovation
 - Awards/Recognitions in Teaching
 - Scholarly Works on Teaching & Learning
 - Projects Leading to System-wide Impact
 - Other

Items marked with an asterisk are required in portfolios for major reviews. For more information on the types of portfolio you can create with the eTP system, see [6. Creating a portfolio](#).

Note that you do not need to create a record for your SFQ results. The eTP system will get the SFQ report from the eSFQ system for you when you create your portfolio (see Step 4 in [6.1 Selecting records and SFQ results to be included in portfolio](#)).

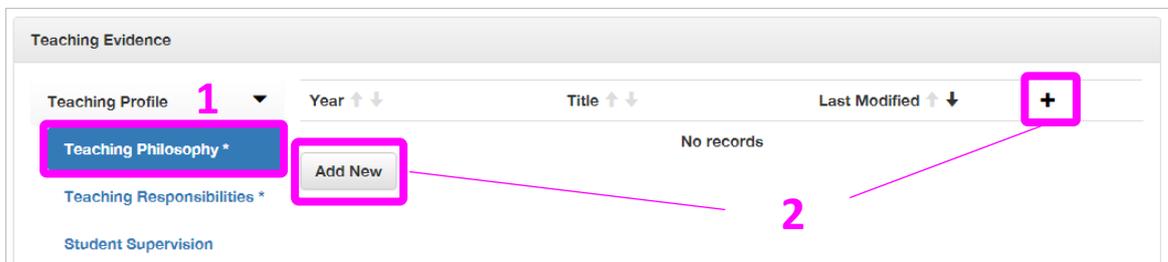
4.1 Adding a record to a portfolio item

Tip: If you are creating a portfolio for major review (see [6. Creating a portfolio](#) for more information on types of portfolio), a good strategy would be to start with the required items first (see [4. Managing portfolio items](#)).

Step 1 Click **Contents** on the top menu bar, then select **Teaching Evidence** from the drop-down menu.



Step 2 Select a portfolio item in the side menu (e.g., Teaching Philosophy), then click the **Add New** button or **plus icon** + to open a window for adding a record to the item.



Step 3 Enter the information as appropriate. **Note that there is a word limit for "Description". If you exceed the preset word limit, you won't be able to save your record.**

 A screenshot of the 'Add Teaching Philosophy' form. The form has a title field with the text 'Teaching statement for 2016 major review'. Below the title is a description field with a rich text editor toolbar and the text 'I believe teaching is not really about passing on knowledge to learners but encouraging them to be inquisitive and equipping them with the necessary skills to learn by themselves.' Below the description is a 'Supporting Documentation' section with a 'Title' field and the text 'Artefact (File/URL)'. Below that is a 'Criterion/criteria to be addressed by the item' section with four checkboxes: 'Quality of teaching' (checked), 'Impact on student learning', 'Contribution to development / management', and 'Educational leadership'. A 'Save' button is at the bottom right.

Step 4 You may want to attach supporting documents (e.g., a link to a video, PDF, photo) to a record to illustrate or substantiate your teaching evidence.

To do this, click the **pencil icon** in the **Supporting Documentation** section. You can attach multiple files and/or URLs to a record.

Add Teaching Philosophy

Title
Teaching statement for 2016 major review

Description
I believe teaching is not really about passing on knowledge to learners but encouraging them to be inquisitive and equipping them with the necessary skills to learn by themselves.

Supporting Documentation

Title Artefact (File/URL)

Criterion/criteria to be addressed by the item
 Quality of teaching
 Impact on student learning
 Contribution to development / management
 Educational leadership

Save

Step 5a A list of available documents will be displayed if you have previously uploaded any to your supporting documentation repository (see [5.1 Uploading and tagging a supporting document](#)).

1. You can filter the entries by clicking on the tags, if any (see [5.1 Uploading and tagging a supporting document](#))
2. Select the document that you would like to attach to the item by clicking on the entry and it will then be shown in the **Attached** section. Repeat this step to attach multiple documents if needed.
3. Click **Close** when you are done attaching the supporting documents.

Attach Supporting Documentation

Supporting Documentation
Filters: 2016 ✕ Tags: teaching-responsibilities

Title ↑ ↓	Artefact (File/URL) ↑ ↓	Tags ↑ ↓	Last Modified ↑ ↓ +
EDC1234 link	http://eldss.edc.polyu.edu.hk/ams/activitydetail.aspx?activity_id=1192 Download	2016 teaching-responsibilities	Apr 19, 2016 10:43:00 AM
EDC2468 link	http://edc.polyu.edu.hk/prog/beta/index.htm	teaching-responsibilities 2016	Apr 19, 2016 10:42:44 AM

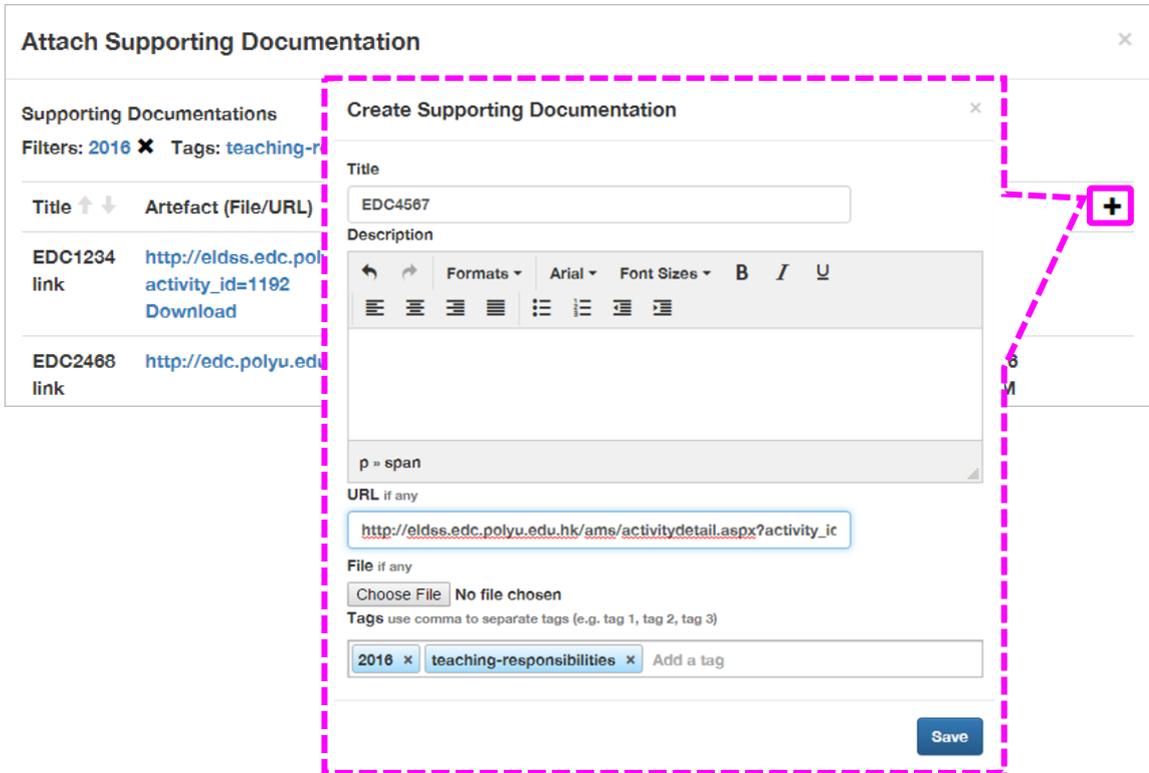
Attached

Title	Artefact (File/URL)
-------	---------------------

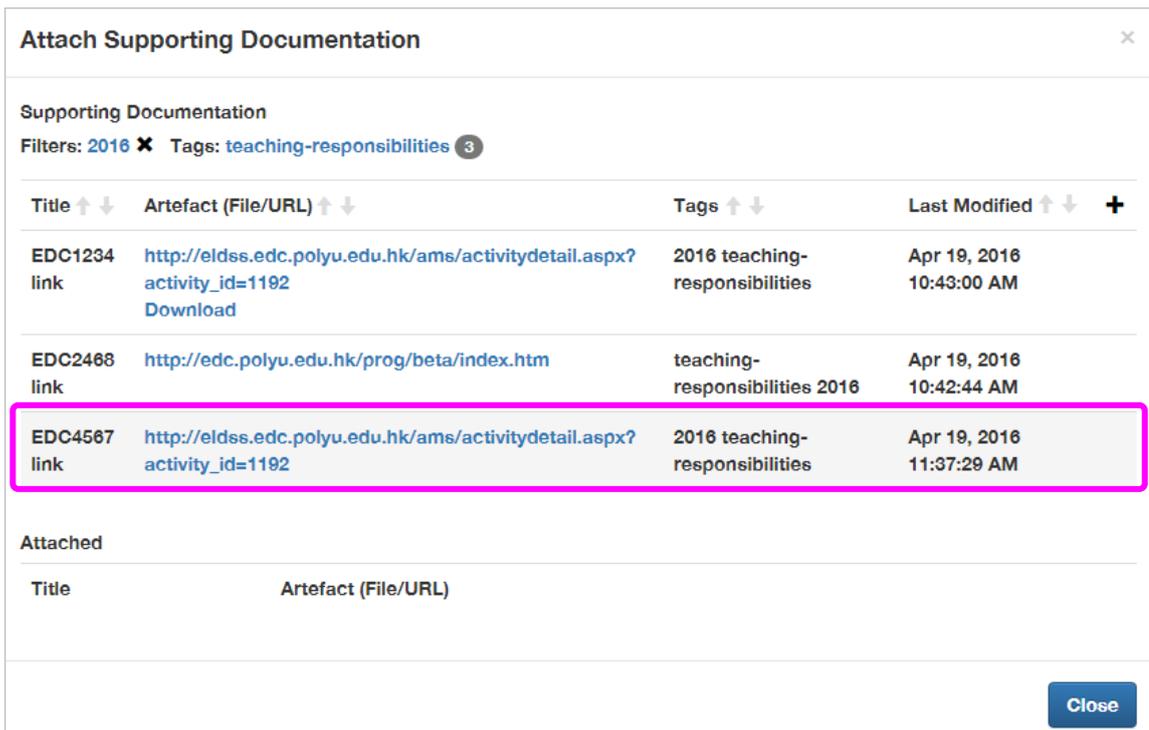
Close

Step 5b If you have no supporting documents in your repository or want to upload a new one:

1. Click the **plus icon +** in the header to open the **Create Supporting Documentation** window. Enter the information as appropriate and save the record to add the supporting document to your repository.



2. Your newly uploaded supporting document will then appear in the list. Click on it to attach it to the record.



Step 6 To remove an attached document from the record, click the **cross icon** ✕. (Note: Removing an attached document from a record will not delete it from your repository.)

When you are done attaching the supporting documents to your record, click **Close** to return to the record.

Attach Supporting Documentation ✕

Supporting Documentations
 Filters: 2016 ✕ Tags: teaching-responsibilities 2

Title ↑ ↓	Artefact (File/URL) ↑ ↓	Tags ↑ ↓	Last Modified ↑ ↓ +
EDC1234 link	http://eldss.edc.polyu.edu.hk/ams/activitydetail.aspx?activity_id=1192 Download	2016 teaching-responsibilities	Apr 19, 2016 10:43:00 AM
EDC2468 link	http://edc.polyu.edu.hk/prog/beta/index.htm	teaching-responsibilities 2016	Apr 19, 2016 10:42:44 AM

Attached

Title	Artefact (File/URL)	✕
EDC4567 link	http://eldss.edc.polyu.edu.hk/ams/activitydetail.aspx?activity_id=1192	✕

Close

Step 7 Click **Save** to save your record.

Add Teaching Philosophy ✕

Title

Description

↶ ↷ Formats ▾ Font Family ▾ Font Sizes ▾ **B** *I* U

I believe teaching is not really about passing on knowledge to learners but encouraging them to be inquisitive and equipping them with the necessary skills to learn by themselves.

Supporting Documentation

Title	Artefact (File/URL)	✎
EDC4567 link	http://eldss.edc.polyu.edu.hk/ams/activitydetail.aspx?activity_id=1192	

Criterion/criteria to be addressed by the item

- Quality of teaching
- Impact on student learning
- Contribution to development / management
- Educational leadership

Save

Save

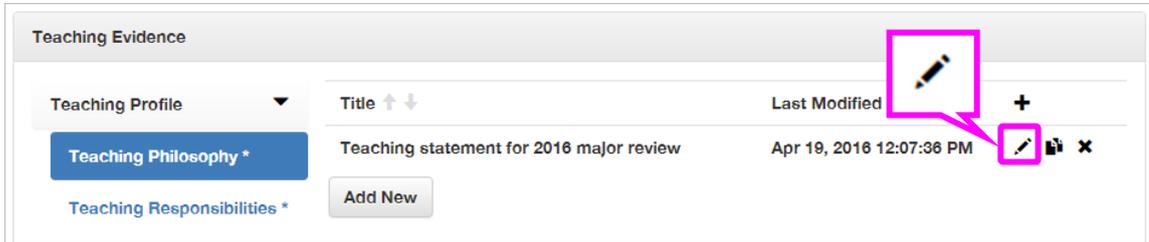
Step 8 Your newly created record is now added to your teaching evidence repository with a timestamp (**Last Modified**). You can create multiple records for each portfolio item for different portfolios for different audience or purposes.

Teaching Evidence			
Teaching Profile	Title ↑ ↓	Last Modified ↑ ↓	+
Teaching Philosophy *	Teaching statement for 2016 major review	Apr 19, 2016 12:07:38 PM	  
Teaching Responsibilities *	<input type="button" value="Add New"/>		

4.2 Editing a record of a portfolio item

Step 1 Go to the portfolio item (e.g., Teaching Philosophy) that contains the record that you wish to edit.

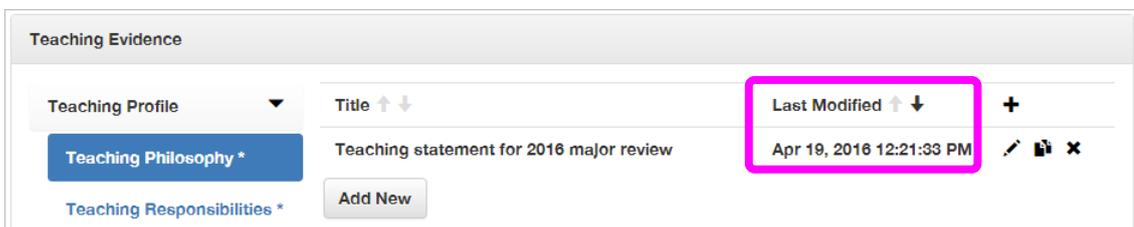
Click the **pencil icon** on the right-hand side to open the editing window for the record.



Step 2 Modify the information as appropriate. Click **Save** to save the changes. You will be notified upon successful saving.

Note that changes made to the contents except the selection of criteria to be addressed by the item will be updated in all existing portfolios containing this record.

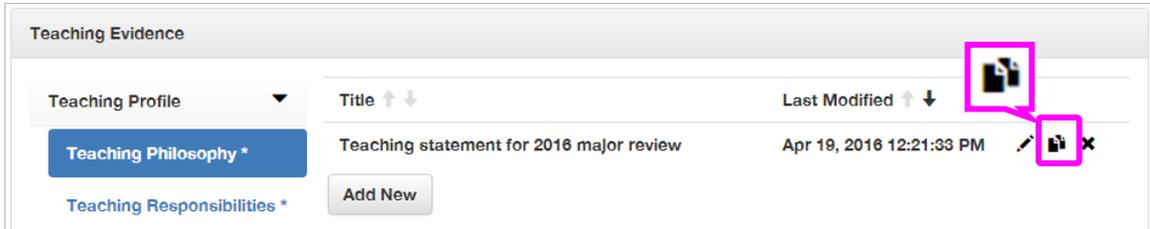
Step 3 Your edited record is now saved to your teaching evidence repository with an updated timestamp (**Last Modified**).



4.3 Duplicating a record of a portfolio item

Teachers often provide different records for different career and academic purposes. You can save some time not having to input the same information again and again for records sharing the same or similar information by duplicating then editing a record.

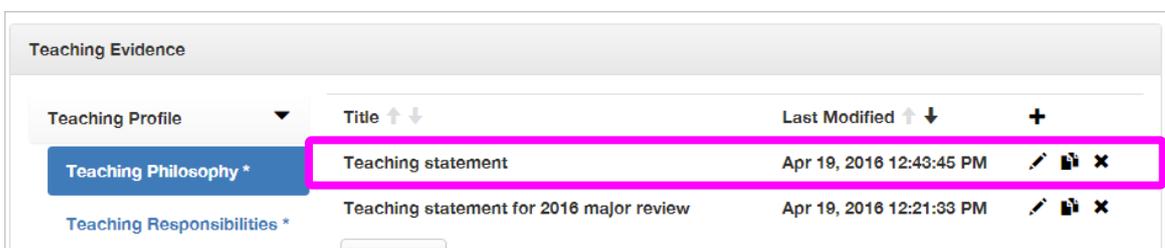
Step 1 Go to a portfolio item (e.g., Teaching Philosophy). Click the **copy icon**  on the right-hand side.



Step 2 A window with duplicated information will pop up. Modify the information as needed, then click **Save** to save the record. You will be notified upon successful saving.

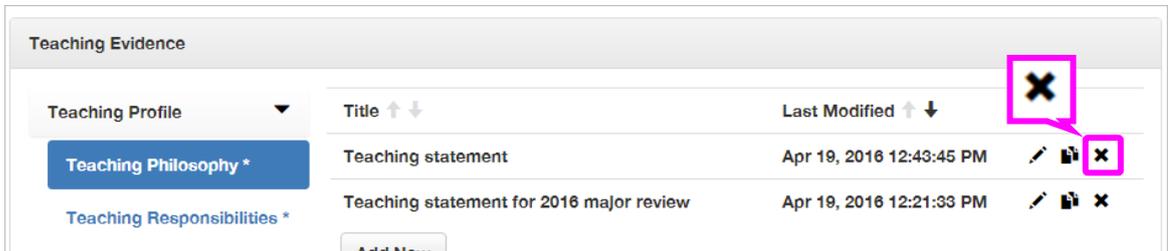
The screenshot shows a dialog box titled 'Copy Teaching Philosophy'. It contains a 'Title' field with the text 'Teaching statement for 2016 major review'. Below is a 'Description' field with a rich text editor containing the text: 'I believe teaching is not really about passing on knowledge to learners but encouraging them to be inquisitive and equipping them with the necessary skills to learn by themselves.' Below the description is a 'Supporting Documentation' table with one row: 'EDC4567 link' and 'http://eldss.edc.polyu.edu.hk/ams/activitydetail.aspx?activity_id=1192'. At the bottom, there are checkboxes for 'Quality of teaching' (checked), 'Impact on student learning', 'Contribution to development / management', and 'Educational leadership'. A pink box highlights the 'Save' button at the bottom right.

Step 3 Your duplicated record is now saved as a new record to your teaching evidence repository with a timestamp (**Last Modified**).



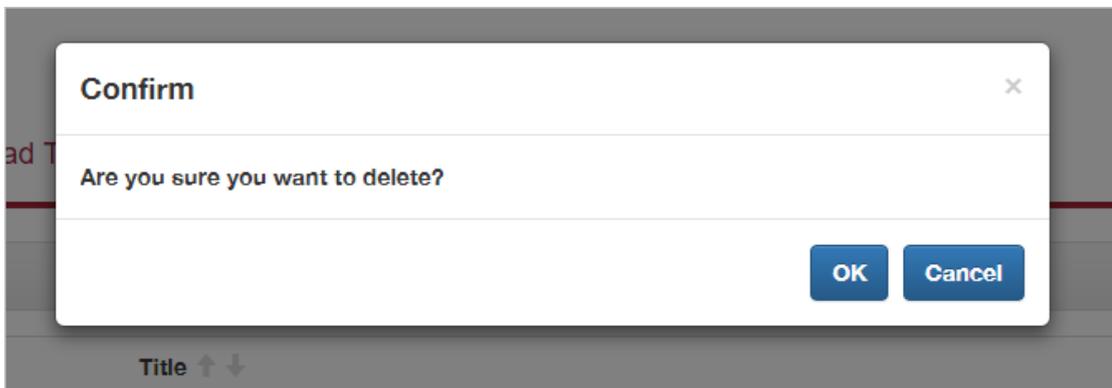
4.4 Deleting a record from a portfolio item

Step 1 To delete a record from a portfolio item, go to the portfolio item (e.g., Teaching Philosophy), then click the **cross icon** **x** next to the record that you wish to delete.



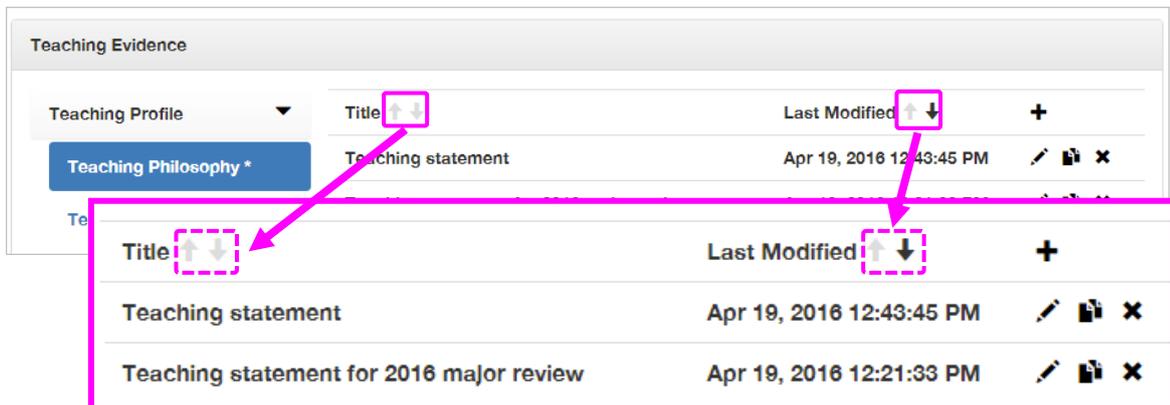
Step 2 A prompt will pop up and ask you to confirm if you really would like to delete the record.

Click **OK** to confirm the deletion or **Cancel** to cancel the action.



4.5 Sorting records

You can sort the records in ascending or descending order by clicking the **upward or downward arrow** **↑ ↓** respectively in the column header.



4.6 Reviewing portfolio items

All records you have input and supporting documents you have uploaded are listed in **View All Records**. You can add, edit, duplicate or delete a particular record from there.

Step 1 To view all the records in your repository, click **Contents** on the top menu bar, then select **View All Records**.

Alternatively, you can click **View All Records** in the side menu if you are already in the **Teaching Evidence** page.

The screenshot shows the 'Teaching Evidence' page. At the top, the 'Contents' menu is highlighted with a pink box and labeled '1'. A dropdown menu is open, showing 'Teaching Evidence', 'Supporting Documentation', and 'View All Records', with 'View All Records' highlighted by a pink box and labeled '2'. On the left sidebar, the 'View All Records' link is also highlighted with a pink box. The main content area shows a table of records with columns for Year, Title, and Last Modified. Two records are visible: 'Teaching statement' and 'Teaching statement for 2016 major review'. An 'Add New' button is located to the left of the table.

Step 2 All records you have created and files/links you have uploaded will be displayed. You can add, edit, duplicate or delete a particular record, and collapse/expand sections in this page by using the function buttons.

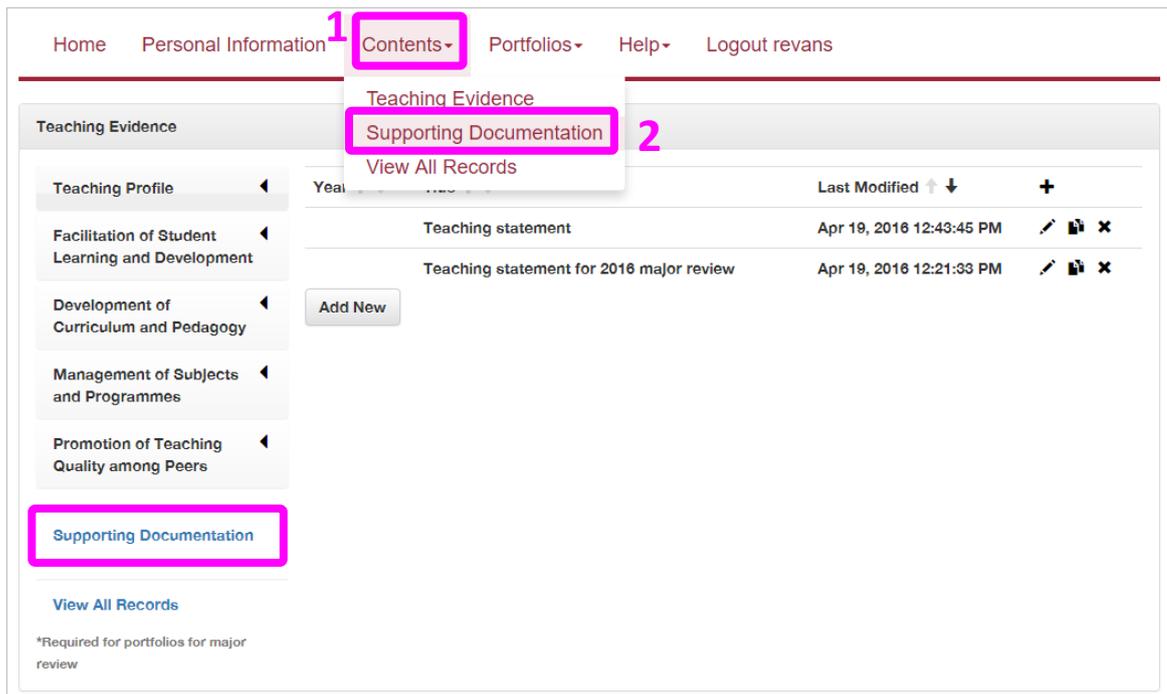
The screenshot shows the 'Edit Portfolio Items' page. The page is divided into sections for 'Teaching Philosophy *' and 'Teaching Responsibilities *'. The 'Teaching Philosophy *' section contains a table with columns for Year, Title, and Last Modified. Two records are listed: '2016 2015 annual review for appraisal' and '2016 2015 annual review'. The 'Teaching Responsibilities *' section contains a table with columns for Year(s), Semester(s), Subject, Involvement / Responsibility / Role, and Last Modified. Three records are listed: '2014/15 1 EDC1234: Educational Research, Technology and Leadership', '2014/15 2 EDC2468: Becoming an Effective Teacher', and '2014/15-2015/16 2 EDC4567: Scholarship of Teaching and Learning'. A pink box highlights the function buttons (plus, edit, duplicate, delete) for each record in the 'Teaching Responsibilities *' table.

5. Managing supporting documentation

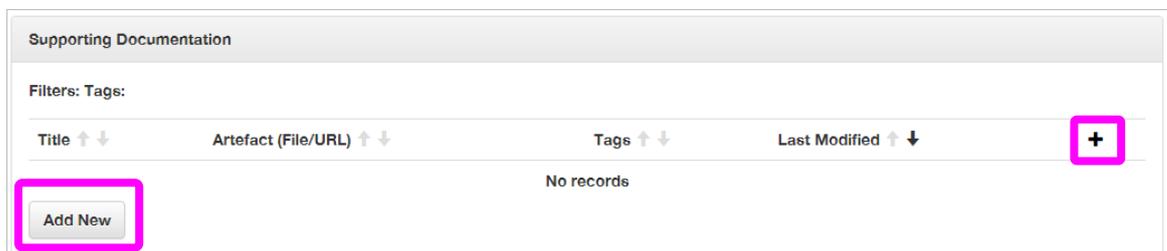
5.1 Uploading and tagging a supporting document

You can upload supporting documents (e.g., a course guide you have developed) in the form of a file or URL and attach them to the relevant portfolio item records. Your uploaded supporting documents can be found in **Supporting Documentation**.

Step 1 To upload supporting documents to your repository, click **Contents > Supporting Documentation** on the top menu bar or in the side menu if you are already in the **Teaching Evidence** page.



Step 2 Click the **Add New** button or plus icon **+** to open the **Add Supporting Documentation** window.



- Step 3**
1. Enter the information as appropriate.
 2. To upload a file saved on your computer, click **Choose File** then select the relevant file.

Add Supporting Documentation ×

Title

Description

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An infographic of the award-winning design

p

URL if any

File if any
 No file chosen

Tags use comma to separate tags (e.g. tag 1, tag 2, tag 3)

- Step 4** You can add your own tags to the supporting document. Use comma to separate tags (e.g., 2016, student achievement).

To remove a tag, click the **cross icon** × on the tag.

No file chosen

Tags use comma to separate tags (e.g. tag 1, tag 2, tag 3)

2016 × feedback

- Step 5** Click **Save** in the bottom right corner of the window to save your record.

Student A's design.jpg

Tags use comma to separate tags (e.g. tag 1, tag 2, tag 3)

notable-student-achievement ×
2015 ×
Add a tag

- Step 6** Your uploaded documents can be found in **Supporting Documentation**.

Supporting Documentation			
Filters: Tags: teaching-responsibilities 3 2015 2 notable-student-achievement 1			
Title ↑ ↓	Artefact (File/URL) ↑ ↓	Tags ↑ ↓	Last Modified ↑ ↓ +
EDC1234 link	http://edc.polyu.edu.hk/sfq-tp-principles.htm Download	teaching-responsibilities 2015	Feb 15, 2016 11:58:15 AM ✎ ✕
HK Young Design Talent Award 2014 (Student A) infographic	Download	notable-student-achievement 2015	Feb 15, 2016 11:55:54 AM ✎ ✕
EDC2468 link	http://edc.polyu.edu.hk/prog/beta/index.htm	teaching-responsibilities	Feb 15, 2016 11:14:26 AM ✎ ✕

5.2 Attaching a supporting document to a portfolio item record

You can attach multiple documents (e.g., a course guide you have developed) in the form of a file or an URL to the relevant portfolio item records.

Step 1 Go to the portfolio item (e.g., Curriculum/Programme/Subject Development) and click the **pencil icon**  next to the relevant record to open the editing window.

Academic Year 	Programme/Subject title 	Your role and contribution 	Last Modified 	
2011-2015	Online Tutorial on Academic Integrity	Course developer, course coordinator, course administrator and course instructor	Feb 15, 2016 2:48:51 PM	  

Step 2 Click the **pencil icon**  in the **Supporting Documentation** section.

Edit Curriculum/Programme/Subject Development ✕

Academic Year

Programme/Subject title

Your role and contribution

Nature of work

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I developed the course materials for students to learn about academic integrity and put them together as an online tutorial in 2011. I conducted a pilot study in the same year; evaluation and revision of course contents were also done subsequently. The tutorial has been implemented as a compulsory completion requirement for all UG new entrants since 2012.

¶

Supporting Documentation:

Title **Artefact (File/URL)** 

Criterion/criteria to be addressed by the item

Quality of teaching

Impact on student learning

Contribution to development / management

Educational leadership

Changes made to the criteria selection here will not be reflected in any existing portfolios containing this item.

Save

5.2 Attaching a supporting document to a portfolio item record

- Step 3a** A list of available supporting documents will be displayed if you have previously uploaded any to your repository (see [5.1 Uploading and tagging a supporting document](#)).
1. You can filter the entries by clicking on the tags, if any.
 2. Select the supporting document that you would like to attach to the record by clicking on the entry and it will then be shown in the **Attached** section. Repeat this step to attach multiple documents if needed.
 3. Click **Close** when you are done attaching the supporting documents.

The screenshot shows the 'Attach Supporting Documentation' window. At the top, there is a section for 'Supporting Documentation' with a list of filters and tags. A pink box labeled '1' highlights this section. Below it is a table of documents with columns for Title, Artefact (File/URL), Tags, and Last Modified. A pink box labeled '2' highlights the 'Download' link for the document 'Other contributions to student learning 1.pdf'. Below the table is an 'Attached' section with a table showing the document 'Contribution to student learning>Other feedback artefact' and its 'Download' link. A pink box labeled '3' highlights the 'Close' button at the bottom right.

- Step 3b** If you have no supporting documents in your repository or want to upload a new one:

1. Click the **plus icon** **+** in the header to open the **Create Supporting Documentation** window. Enter the information as appropriate and save the record to add the supporting document to your repository.

The screenshot shows the 'Create Supporting Documentation' window. It has a title field, a description field with a rich text editor toolbar, a URL field, and a file upload section with a 'Choose File' button. There is also a 'Tags' section with an 'Add a tag' input field. A pink dashed box highlights the entire window. A pink box labeled '1' highlights the plus icon in the top right corner of the window. A 'Close' button is visible at the bottom right, and a 'Save' button is at the bottom center.

**Step 3b
(cont'd)**

- Your newly uploaded supporting document will now appear in the list. Click on it to attach it to the record.

Attach Supporting Documentation ✕

Supporting Documentation

Filters: **subject-development** ✕ Tags: teaching-responsibilities 3 2015 15 notable-student-achievement 3 teaching-philosophy 1 reflections-on-my-teaching 2 peer-review 1 teaching-materials 1 2014 4 sample-teaching-materials 1 student-work 2 others 2 2011 3 2012 3 2013 3 dissertation 1 subject-management 1

Title	Artefact (File/URL)	Tags	Last Modified	+
Subject development 1	Download	2011 2012 2013 2014 2015 subject-development	Feb 15, 2016 2:48:34 PM	

Attached

Title	Artefact (File/URL)

[Close](#)

Step 4

To remove an attached supporting document from the item, click the **cross icon ✕**. (Note: Removing an attached supporting document from an item will not delete it from your repository. See [5.3 Deleting a supporting document from repository](#) if you want to completely remove it from the eTP system.)

When you are done attaching the supporting documents to your record, click **Close** to return to the editing window.

Attach Artefact ✕

Artefacts

Filters: **others** ✕ Tags: teaching-responsibilities 3 2015 14 notable-student-achievement 3 teaching-philosophy 1 reflections-on-my-teaching 2 peer-review 1 teaching-materials 1 2014 3 sample-teaching-materials 1 student-work 2 2011 2 2012 2 2013 2 dissertation 1 subject-management 1

Title	Artefact (File/URL)	Tags	Last Modified	+
Contribution to student learning>Other feedback artefact	Download	2015 others	Feb 15, 2016 2:36:35 PM	
Other contributions to student learning 1.pdf	Download	2015 others	Feb 15, 2016 2:43:16 PM	

Attached

Title	Artefact (File/URL)
Subject development 1	Download ✕

[Close](#)

Step 5 In the editing window, click **Save** to save your record.

Edit Curriculum/Programme/Subject Development
✕

Academic Year

2011-2015

Programme/Subject title

Online Tutorial on Academic Integrity

Your role and contribution

Course developer, course coordinator, course administrator ant

Nature of work

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I developed the course materials for students to learn about academic integrity and put them together as an online tutorial in 2011. I conducted a pilot study in the same year; evaluation and revision of course contents were also done subsequently. The tutorial has been implemented as a compulsory completion requirement for all UG new entrants since 2012.

p

Supporting Documentation:

Title	Artefact (File/URL)

Criterion/criteria to be addressed by the item

- Quality of teaching
- Impact on student learning
- Contribution to development / management
- Educational leadership

Changes made to the criteria selection here will not be reflected in any existing portfolios containing this item.

Save

5.3 Deleting a supporting document from repository

Removing a supporting document from **Supporting Documentation** deletes it *permanently from your repository and all the portfolio items that it is attached to*.

- Step 1** Click **Contents > Supporting Documentation** on the top menu bar or in the side menu if you are already in the **Teaching Evidence** page.

The screenshot shows the repository's top navigation bar with 'Contents' highlighted by a pink box and labeled '1'. A dropdown menu is open under 'Contents', with 'Supporting Documentation' highlighted by a pink box and labeled '2'. Below the navigation bar, the 'Teaching Evidence' section is visible, with a 'Supporting Documentation' link highlighted by a pink box. The main content area shows a table of teaching statements with columns for 'Year', 'Title', and 'Last Modified'. Two records are listed: 'Teaching statement' and 'Teaching statement for 2016 major review'. Each record has edit, share, and delete icons. A pink box highlights the 'Supporting Documentation' link in the left sidebar.

- Step 2** Click the **cross icon** ✕ next to the artefact you want to delete permanently from your repository.

The screenshot shows the 'Supporting Documentation' page. At the top, there are filters for tags: 'teaching-responsibilities' (3), '2015' (2), and 'notable-student-achievement' (1). Below the filters is a table with columns: 'Title', 'Artefact (File/URL)', 'Tags', and 'Last Modified'. Three artefacts are listed: 'EDC1234 link', 'HK Young Design Talent Award 2014 (Student A) infographic', and 'EDC2488 link'. Each row has a 'Download' link and a 'Last Modified' timestamp. A pink box highlights the 'cross icon' ✕ next to the 'EDC1234 link' row, with a pink arrow pointing to it from a larger pink box containing the cross icon.

Title	Artefact (File/URL)	Tags	Last Modified
EDC1234 link	http://edc.polyu.edu.hk/sfq-tp-principles.htm Download	teaching-responsibilities 2015	Feb 15, 2016 11:56:15 AM
HK Young Design Talent Award 2014 (Student A) infographic	Download	notable-student-achievement 2015	Feb 15, 2016 11:55:54 AM
EDC2488 link	http://edc.polyu.edu.hk/prog/beta/index.htm	teaching-responsibilities	Feb 15, 2016 11:14:26 AM

Step 3 The **Delete Supporting Documentation** window will pop up, showing you the details about the supporting document. The **Attached To** section tells you to which portfolio items it is attached and in which portfolios it is included.

To confirm the deletion, click **Yes, Delete it** in the bottom right corner. To cancel the action, click **No**.

Note that deleting a supporting document from Supporting Documentation deletes it permanently from your repository and all the portfolio items that it is attached to, including those in the saved portfolios.

Delete Supporting Documentation

✕

Title

Description

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Other feedback from students other than SFQ results

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URL if any

File if any

Attached file: Other feedback report 1.pdf ✕

Choose File No file chosen

Tags use comma to separate tags (e.g. tag 1, tag 2, tag 3)

other ✕ 2015 ✕ feedback ✕ Add a tag

Attached To

Portfolio	Item
Portfolio for 2016 major review	Facilitation of Student Learning and Development > Other
Portfolio for brief review	Facilitation of Student Learning and Development > Other

Are you sure you want to delete this?

This supporting documentation will be removed from all included portfolios.

Yes, Delete It
No

6. Creating a portfolio

There are two types of portfolio you can create with the eTP system: portfolios for major review and portfolios for other purposes. Upon selecting the type of portfolio you want to create, items required in the portfolio will be indicated with an asterisk for your information and reference.

Note that the required items in portfolios for major review align with PolyU's documentation requirement for major reviews set out in the university guidelines on teaching evaluation practices and *The 2011 Framework for Appointment, Promotion and Retention of Academic Staff*.

Before you can create a portfolio, you need to add records to your teaching evidence repository first. How to add portfolio item records to your repository was covered in the previous sections (see [4. Managing portfolio item records](#) & [5. Managing supporting documentation](#)).

With the records ready in your teaching evidence repository, you can create a portfolio in three steps:

- Step 1** Select the portfolio type and appropriate information to be put in portfolio (*Note: The sections marked with an asterisk and items marked as "required" must be filled out or you may not be able to save your portfolio.*)
- Step 2** Reorder selected information and preview portfolio if necessary
- Step 3** Save your portfolio

The screenshot shows the 'Create Portfolio' interface. It is divided into three main sections corresponding to the steps:

- Step 1:** This section is highlighted with a pink box. It includes:
 - Basic Information *:** A tabbed interface with various categories like Teaching Profile, SFQ Results, Peer Review Reports, etc.
 - Portfolio Type required:** Radio buttons for 'For major review' and 'For other purposes'.
 - Portfolio Title required:** A text input field.
 - Appointment Information:** A table with columns for Staff ID, Appointment ID, Post Title, Dept, and Post Category. It contains two rows of data.
- Step 2:** This section is highlighted with a pink box and contains two buttons: 'Re-order Items' and 'Preview Portfolio'.
- Step 3:** This section is highlighted with a pink box and contains two buttons: 'Save' and 'Reset Draft'.

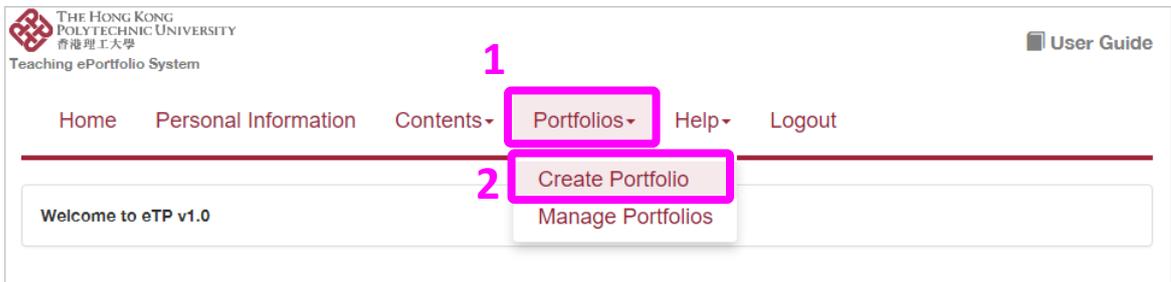
At the bottom left, there is a note: '* required'.

When creating a portfolio, your draft will be saved automatically every few seconds. If you need to clear all your record selections in the draft, click **Reset Draft**.

Other detailed instructions for the above three steps are provided in the following sections.

6.1 Selecting records and SFQ results to be included in portfolio

Step 1 Click **Portfolios > Create Portfolio** on the top menu bar.



Step 2 In the **Create New Portfolio > Basic Information** section, select the portfolio type you want to create, give the portfolio a name and select the appointment information by clicking on the appropriate entry if you have more than one. If you have only one appointment record, it will be already selected for you.

Note that required sections are marked with an asterisk and they must be filled out or you may not be able to save your portfolio.

The screenshot shows the 'Create New Portfolio' form in the 'Basic Information' section. The 'Portfolio Type' is set to 'For major review' (highlighted with a red box and '1'). The 'Portfolio Title' is 'Portfolio for 2016 major review' (highlighted with a red box and '2'). The 'Appointment Information' table has the first row selected (highlighted with a red box and '3').

Staff ID	Appointment ID	Post Title	Dept	Post Category
✓ A12345	1	Lecturer	ABCT	ACA
A12345	2	Instructor	ABCT	ACA

Step 3 Go to different sections using the side menu and select the appropriate records to be put in your portfolio by clicking on the relevant entries.

The screenshot shows the 'Create New Portfolio' form in the 'Teaching Philosophy' section. The side menu is highlighted with a red box and the number '1'. The 'Teaching Philosophy' section is active, showing a table of teaching statements. The first row is selected (highlighted with a red box and '2').

Title	Last Modified
Teaching statement	Apr 19, 2016 12:43:45 PM
✓ Teaching statement for 2016 major review	Apr 19, 2016 12:21:33 PM

Step 4 To include your SFQ results in the portfolio:

1. Go to **SFQ Results**
2. Select the number of years of results (1 year, 3 years, 5 years or 7 years) from the drop-down menu. The system will then get the report from the eSFQ system and add it to your portfolio.
3. Click **Preview PDF** if you would like to preview the report
4. Select the criterion/criteria to be addressed by the item as appropriate

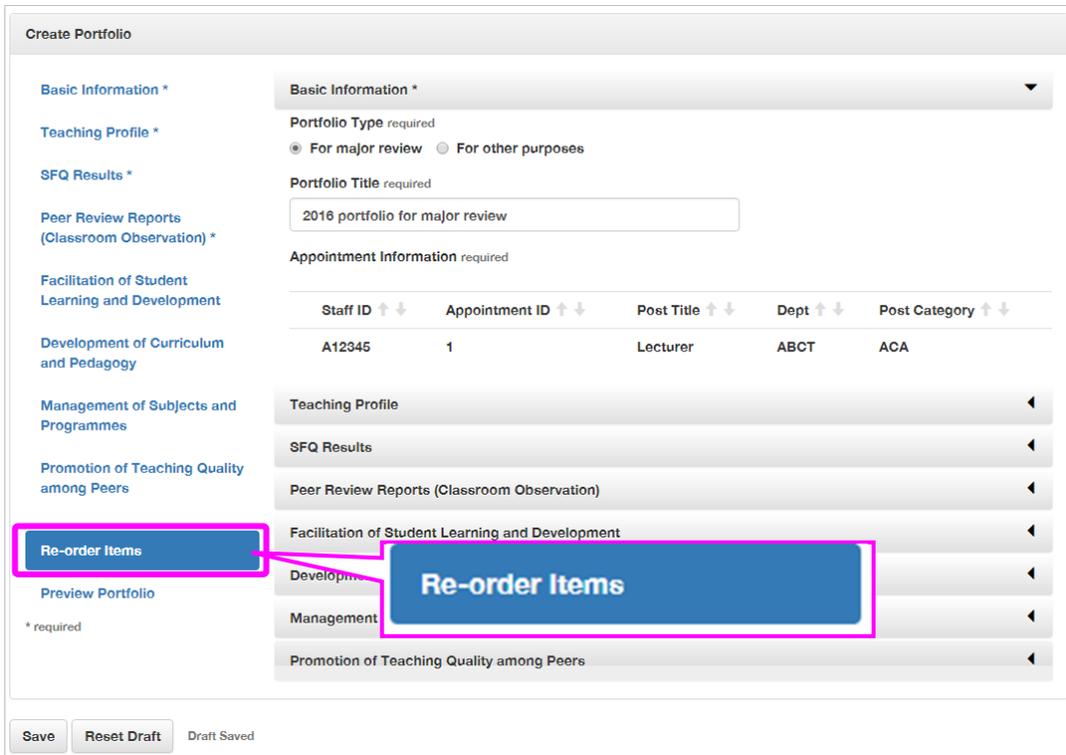
The screenshot shows the 'Create New Portfolio' form. On the left is a vertical sidebar menu with categories: Basic Information *, Teaching Profile, SFQ Results, Peer Review Reports (Classroom Observation), Facilitation of Student Learning and Development, Development of Curriculum and Pedagogy, and Management of Subjects and Programmes. The 'SFQ Results' category is highlighted with a blue box and a pink '1'. The main content area is titled 'SFQ Results' and contains a sub-section 'SFQ Summary Of SFQ results of all subjects plotted against Faculty norms' with a dropdown menu highlighted by a pink box and a pink '2'. Below this is a 'Preview PDF' button highlighted by a pink box and a pink '3'. Further down is a section 'Criterion/criteria to be addressed by the item' with four checkboxes: Quality of teaching, Impact on student learning, Contribution to development / management, and Educational leadership. This section is highlighted by a pink box and a pink '4'.

Step 5 When you are done selecting the records, you can use the side menu to go to **Re-order Items** to see the list of your selected records, or go to **Preview Portfolio** to preview your portfolio, or save your portfolio now by clicking **Save**.

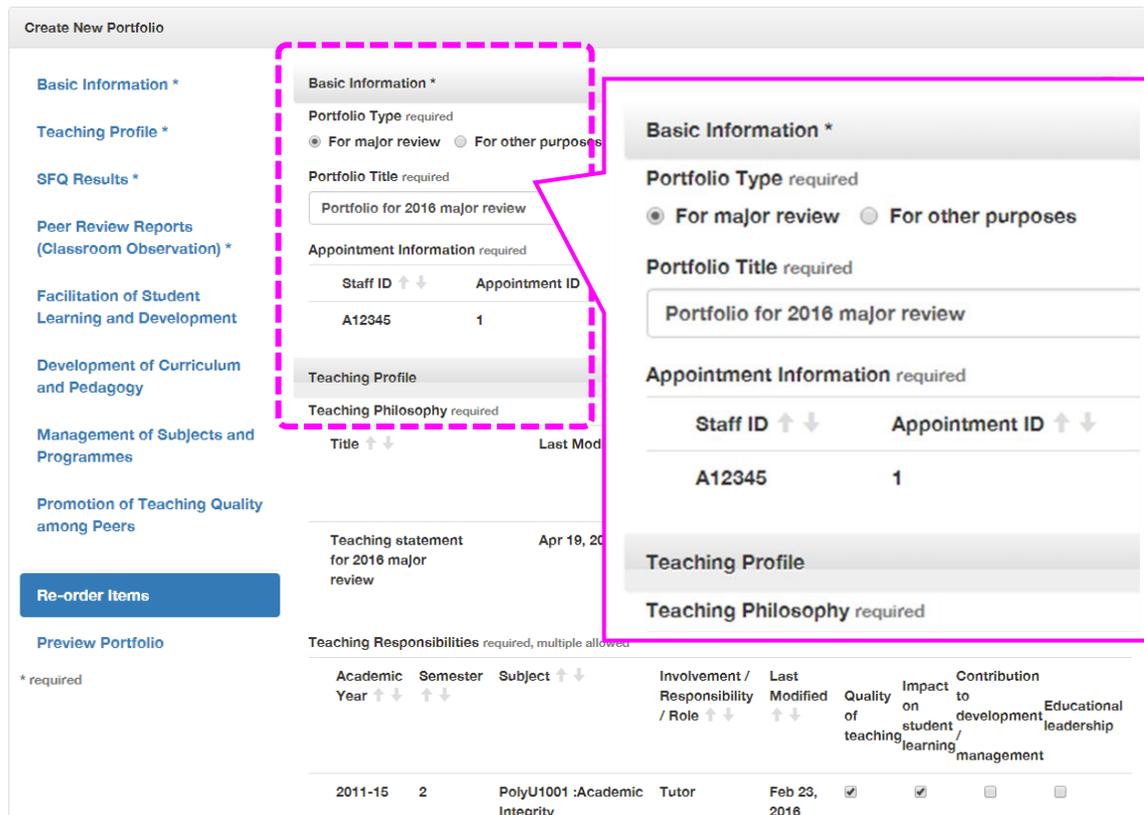
The screenshot shows the 'Create Portfolio' form. The left sidebar menu has 'Re-order Items' and 'Preview Portfolio' highlighted with blue boxes and pink callout lines. The main content area shows 'Basic Information *' with a dropdown menu, 'Portfolio Type required' (radio buttons for 'For major review' and 'For other purposes'), 'Portfolio Title required' (text input with '2016 portfolio for major review'), and 'Appointment Information required' (table with columns: Staff ID, Appointment ID, Post Title, Dept, Post Category). Below this is a 'Teaching Profile' section with a table containing one row: Staff ID A12345, Appointment ID 1, Post Title Lecturer, Dept ABCT, Post Category ACA. At the bottom, there are buttons for 'Re-order Items' and 'Preview Portfolio' highlighted with blue boxes and pink callout lines, and a 'Save' button highlighted with a blue box and a pink callout line. At the very bottom, there are buttons for 'Save', 'Reset Draft', and 'Draft Saved'.

6.2 Reordering portfolio item records

Step 1 When you are done selecting the records you want to include in the portfolio (see [6.1 Selecting records and SFQ results to be included in portfolio](#)), you can go to **Create New Portfolio > Re-order Items** via the side menu to see your list of selected records.



Step 2 You will see the basic information for your portfolio (i.e., portfolio type, portfolio title and appointment information) and the list of portfolio item records you previously selected.



Step 3 You can reorder the record sequence within each portfolio item by clicking the **upward or downward arrow head**   next to the records.

Teaching Responsibilities <small>required, multiple allowed</small>									
Academic Year 	Semester 	Subject 	Involvement / Responsibility / Role 	Last Modified 	Quality of teaching 	Impact on student learning 	Contribution to development / management 	Educational leadership 	
 2014/15	1	EDC1234 :Educational Research, Technology and Leadership	Subject Leader and lecturer	Feb 15, 2016 11:18:10 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
 2014/15	2	EDC2468 :Becoming an Effective Teacher	Lecturer	Feb 15, 2016 11:15:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 4 You can also change the criteria to be addressed by each item if needed. *Note that changes made to the criteria selections here will not be updated in the actual records in your repository.*

Teaching Responsibilities <small>required, multiple allowed</small>									
Academic Year 	Semester 	Subject 	Involvement / Responsibility / Role 	Last Modified 	Quality of teaching 	Impact on student learning 	Contribution to development / management 	Educational leadership 	
 2014/15	1	EDC1234 :Educational Research, Technology and Leadership	Subject Leader and lecturer	Feb 15, 2016 11:18:10 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
 2014/15	2	EDC2468 :Becoming an Effective Teacher	Lecturer	Feb 15, 2016 11:15:15 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 5 When you are done, click **Save** in the bottom left corner to save your portfolio.

Create Portfolio

Basic Information *

Teaching Profile *

SFQ Results *

Peer Review Reports (Classroom Observation) *

Facilitation of Student Learning and Development

Development of Curriculum and Pedagogy

Management of Subjects and Programmes

Promotion of Teaching Quality among Peers

Re-order Items

Preview Portfolio

* required

Basic Information *

Portfolio Type required

For major review For other purposes

Portfolio Title required

2016 portfolio for major review

Appointment Information required

Staff ID 	Appointment ID 	Post Title 	Dept 	Post Category 
A12345	1	Lecturer	ABCT	ACA

Teaching Profile 

SFQ Results 

Peer Review Reports (Classroom Observation) 

Facilitation of Student Learning and Development 

Development of Curriculum and Pedagogy 

Management of Subjects and Programmes 

Promotion of Teaching Quality among Peers 

Save

Reset Draft

Draft Saved

6.3 Previewing portfolio

Step 1 When you are done selecting and reordering the records you want to include in the portfolio (see [6.1 Selecting records and SFQ results to be included in portfolio](#) & [6.2 Reordering portfolio item records](#)), you can go to **Create New Portfolio > Preview Portfolio** via the side menu to preview your portfolio.

Click on the table of contents to go to the desired sections or scroll down to view the full portfolio.

The screenshot shows the 'Create Portfolio' interface. On the left is a sidebar with a 'Re-order Items' section containing a 'Preview Portfolio' button. A pink callout box points from this button to a larger 'Preview Portfolio' callout box. The main content area displays the 'Table of Contents' for a portfolio titled '2016 portfolio for major review'. The table of contents lists various sections such as 'Personal & Appointment Information', 'Teaching Profile', 'SFQ Results', and 'Appendix A'. At the bottom, the 'Personal & Appointment Information' section is partially visible, showing details for Ruby EVANS.

Create Portfolio

Portfolio Title: **2016 portfolio for major review**

Table of Contents

- Personal & Appointment Information
- Teaching Profile
 - Teaching Philosophy
 - Teaching Responsibilities
 - Student Supervision
 - Reflections on My Teaching
 - Enhancement Efforts
- SFQ Results
- Facilitation of Student Learning and Development
 - Peer Review Reports (Classroom Observation)
 - Teaching Materials
 - Other
- Development of Curriculum and Pedagogy
 - Curriculum/Programme/Subject Development
 - Other
- Management of Subjects and Programmes
 - Programme/Subject Management
 - Committee Work
 - Other
- Promotion of Teaching Quality among Peers
 - Teaching Development Projects
 - Action Research on Teaching Innovation
 - Awards/Recognitions in Teaching
 - Scholarly Works on Teaching & Learning
 - Projects Leading to System-wide Impact
 - Other
- Appendix A
 - List of Supporting Documentation
 - Other Attachments

Portfolio Title: **2016 portfolio for major review**

Personal & Appointment Information

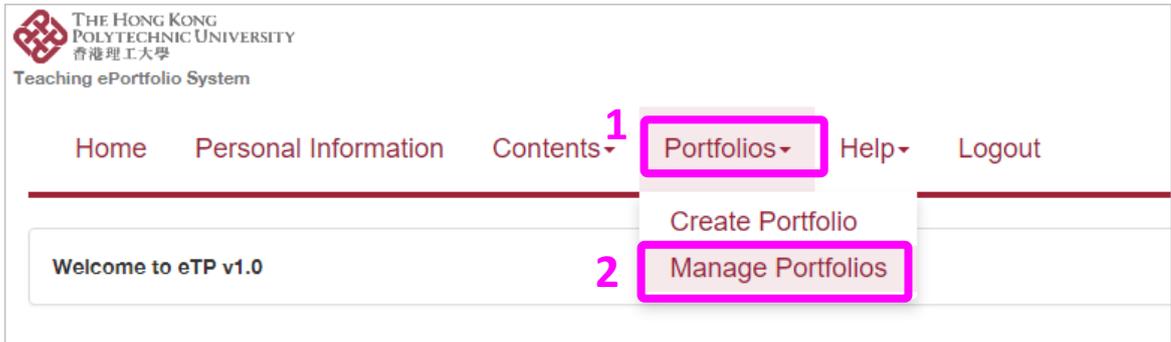
Staff name: Ruby EVANS
 Readable name: Dr Ruby Evans
 Net ID: revans
 Staff ID: A12345
 Appointment ID: 1
 Department: ABCT
 Post title: Lecturer

7. Managing portfolios

The portfolios you create can be found in **Manage Portfolios** where you can edit, duplicate, delete, add and export a portfolio.

7.1 Editing, duplicating, deleting and adding a portfolio

Step 1 Click **Portfolios** on the top menu bar, then **Manage Portfolios**.



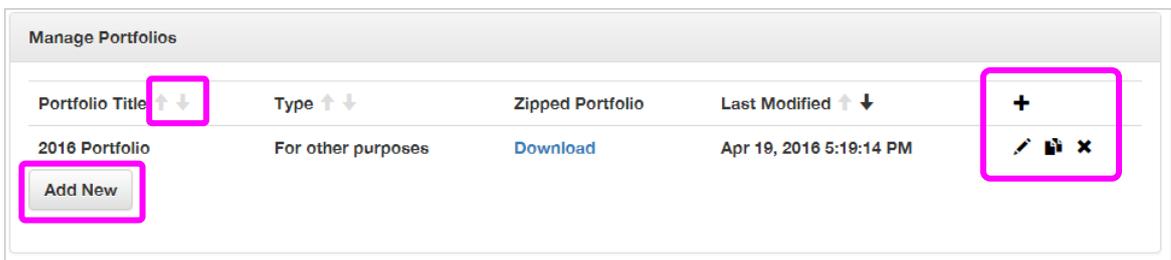
Step 2 You can sort the portfolio records in ascending and descending order by clicking the **upward or downward arrow**   respectively in the column header.

To add a new portfolio, click the **Add New button** or **plus icon**  and select the records you want to include in the portfolio (see 6. *Creating a portfolio*).

To edit a portfolio, click the **pencil icon**  and edit the portfolio content as appropriate.

To duplicate a portfolio, click the **copy icon**  and edit the portfolio content as appropriate.

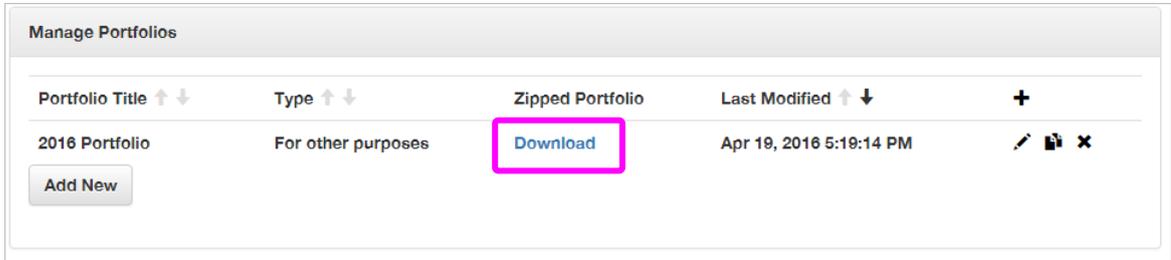
To delete a portfolio, click the **cross icon** .



7.2 Exporting a portfolio

Step 1 To export a portfolio in .zip format, click **Download**.

Note that there is a size limit of 900 MB for the exported portfolio. If your portfolio exceeds this limit, you will be notified upon downloading it, and you may want to reduce the size or number of attachments in your portfolio.



Step 2 When you open the ZIP file, you will see your portfolio breaks down into different files and folders:

1. A Word document containing all the detailed information of the portfolio items (text only) you have included in the portfolio. If needed, you extract the files and do further editing and formatting of the document using MS Word;
2. An HTML file – this is the HTML version of the Word document. You can open your supporting documents of certain types (e.g., PDF, JPEG) directly from this file (Note: Any changes made to the Word document will not be updated in the HTML file.);
3. An SFQ report in PDF format; and
4. Your supporting documents organised in their corresponding folders.

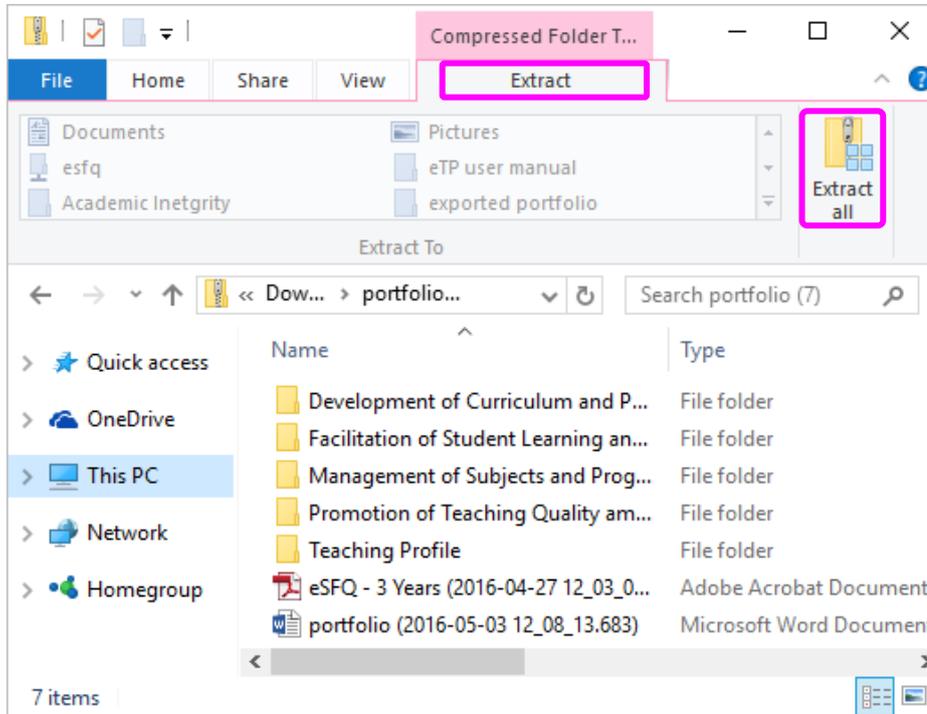
The collage shows the following components:

- File Explorer:** Displays the unzipped portfolio files, including 'portfolio (2016-06-10 16_19_43.487)', 'eSFQ - 3 Years (2016-06-10 15_55_45.379)', 'Teaching Profile', and 'Promotion of Teaching Quality among Peers'. A pink box highlights the Word document files, with a callout '4' pointing to them.
- Browser Window:** Shows the HTML version of the portfolio. It includes 'Personal & Appointment Information' and 'Teaching Profile' sections. A pink box highlights the 'Personal & Appointment Information' section, with a callout '2' pointing to it.
- SFQ Report PDF:** Shows a 'Summary Table of SFQ Results on Teaching of the Staff Member (past 2 years)'. A pink box highlights the table, with a callout '3' pointing to it.
- Another Browser Window:** Shows another view of the HTML portfolio, highlighting the 'Personal & Appointment Information' and 'Teaching Profile' sections. A pink box highlights the 'Personal & Appointment Information' section, with a callout '1' pointing to it.

8. Editing an exported portfolio using MS Word

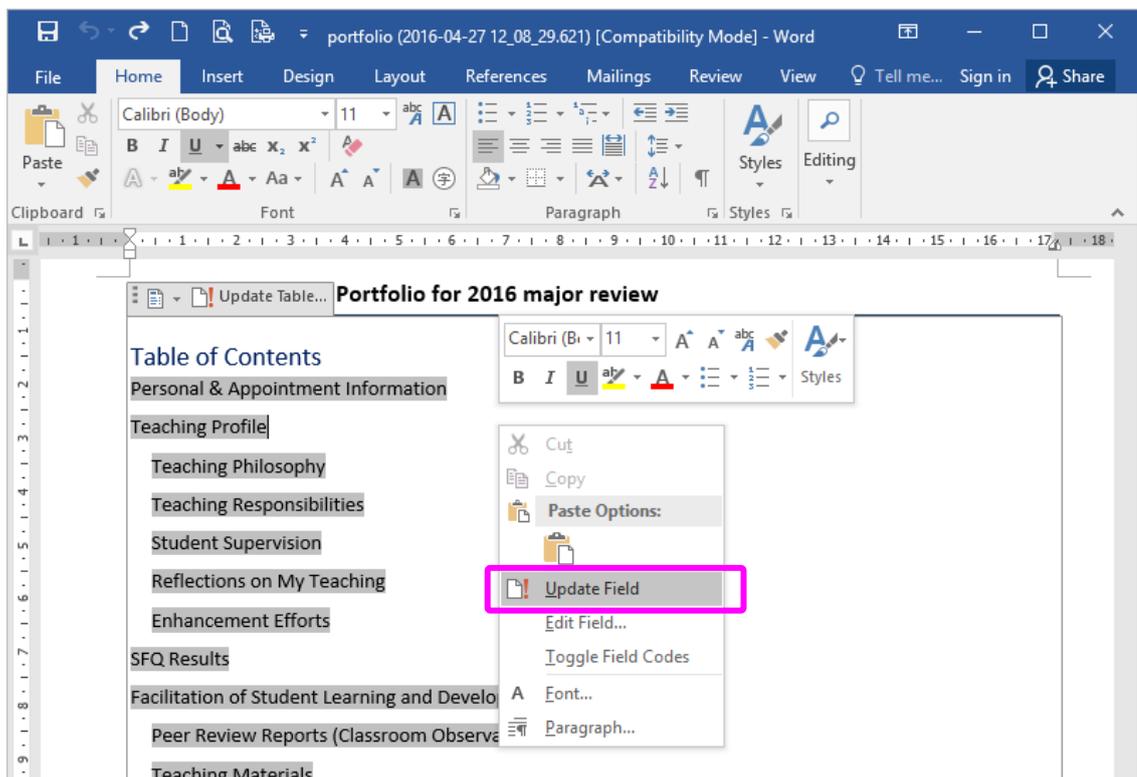
You can edit the contents and formatting of the layout of the exported portfolio in MS Word as you see fit.

Step 1 Extract the files to a designated folder (e.g., New folder on desktop).



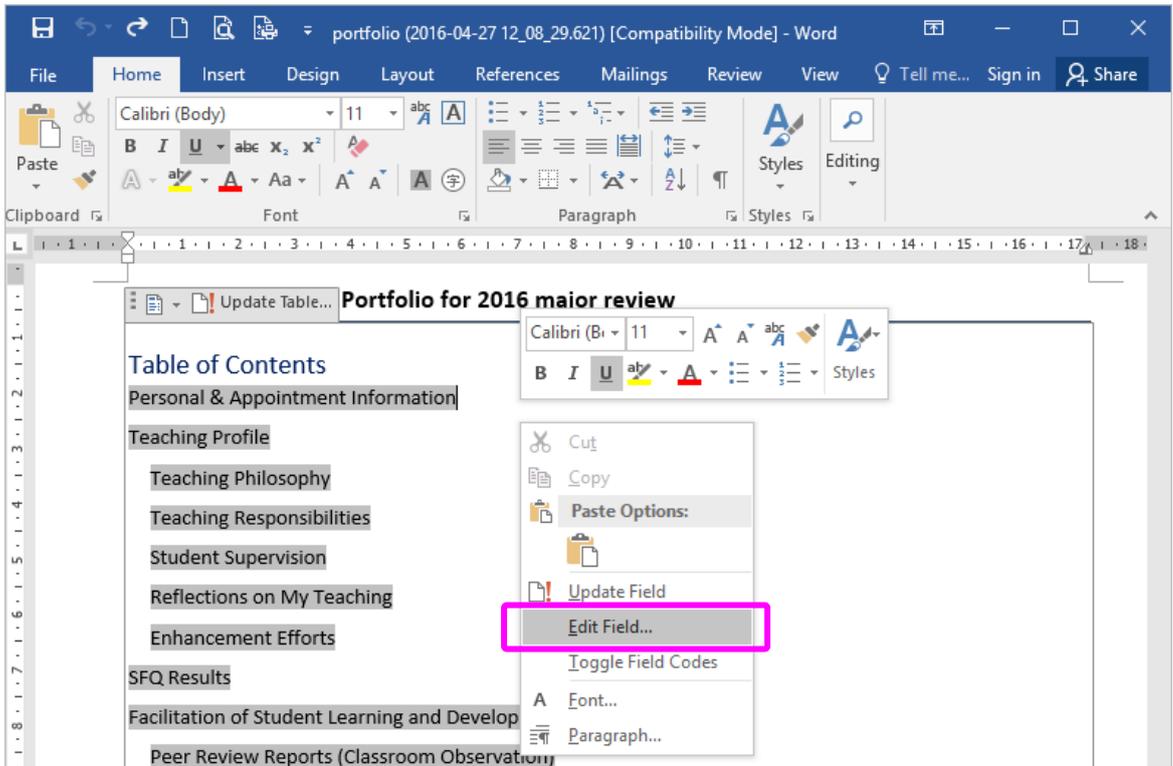
Step 2 Open the extracted portfolio Word document and modify the contents or formatting as you see fit.

Step 3 To update the table of contents, right click the table of contents, then click **Update Field**.

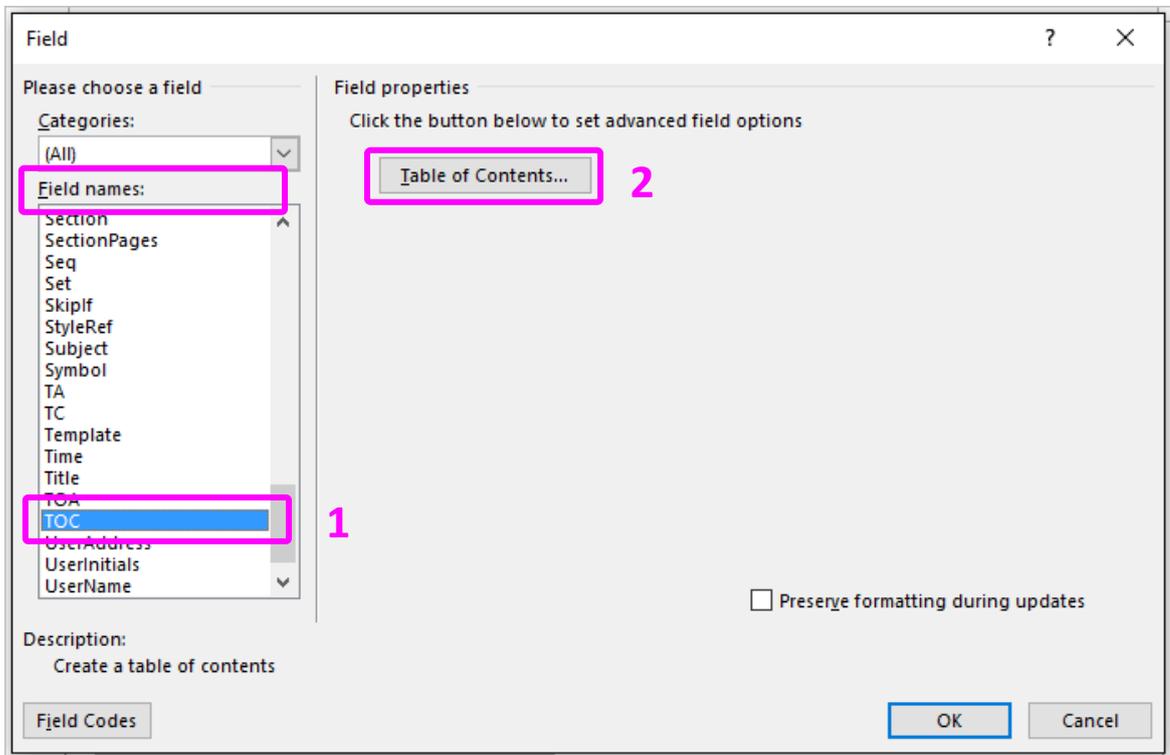


Step 4 To update the table of contents to include page numbers:

1. right click the table of contents, then click **Edit Field...**

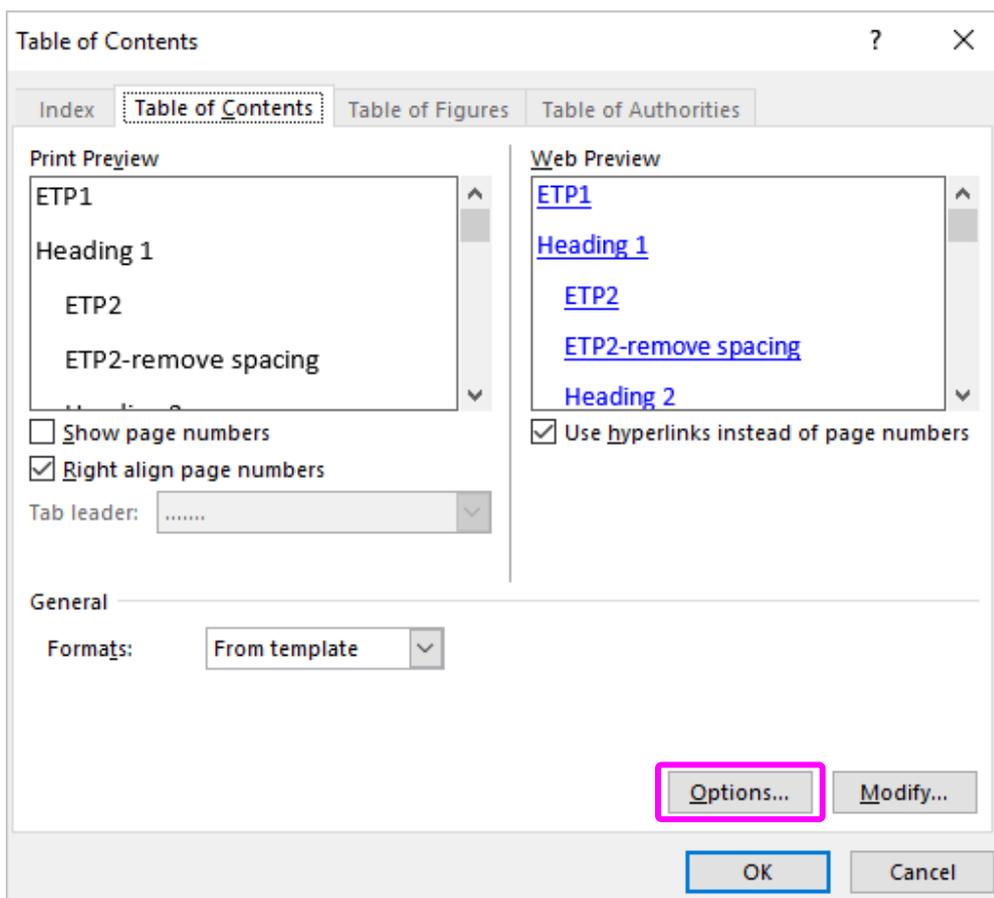


2. Select **TOC** from **Field names** on the left hand side, then click **Table of Contents...**

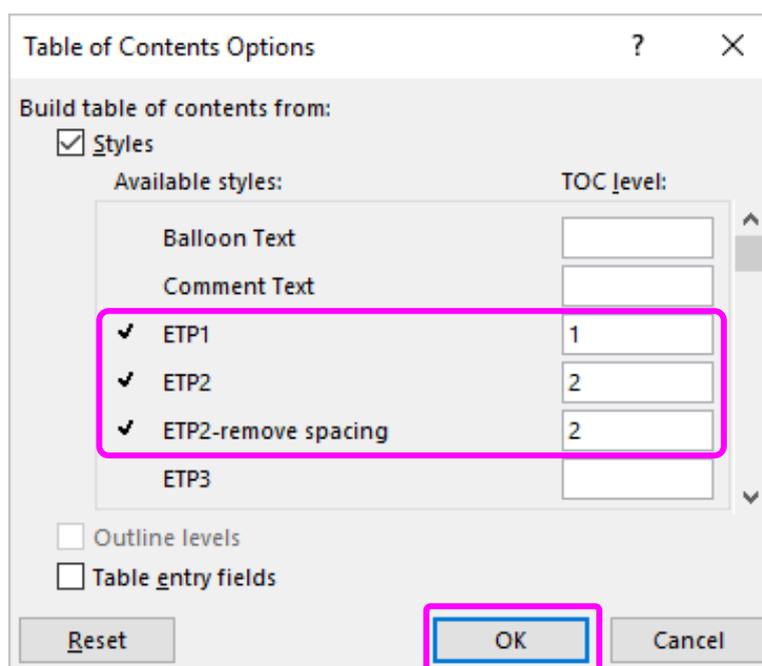


Step 4
(cont'd)

3. In the **Table of Contents** tab, click **Options...**

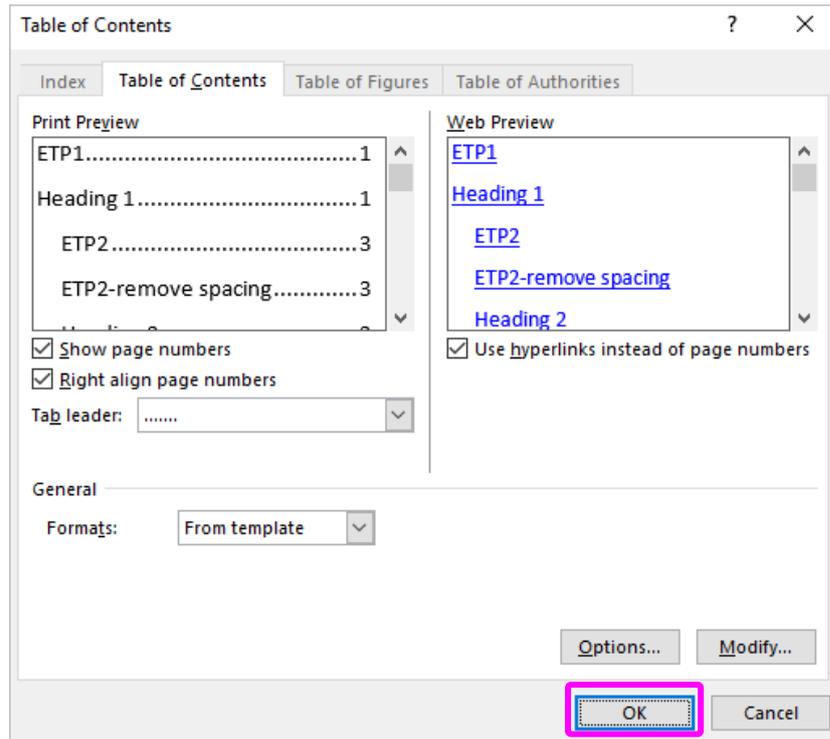


4. In the **Table of Contents Options** window, type in 1 for ETP1, and 2 for ETP2 and ETP-remove spacing, then click **OK**.

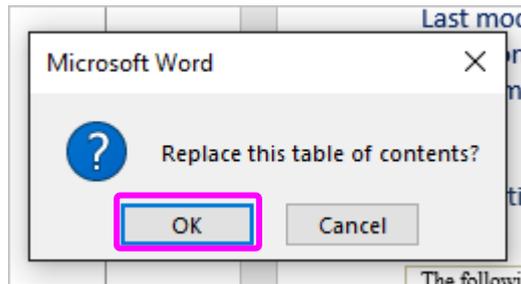


**Step 4
(cont'd)**

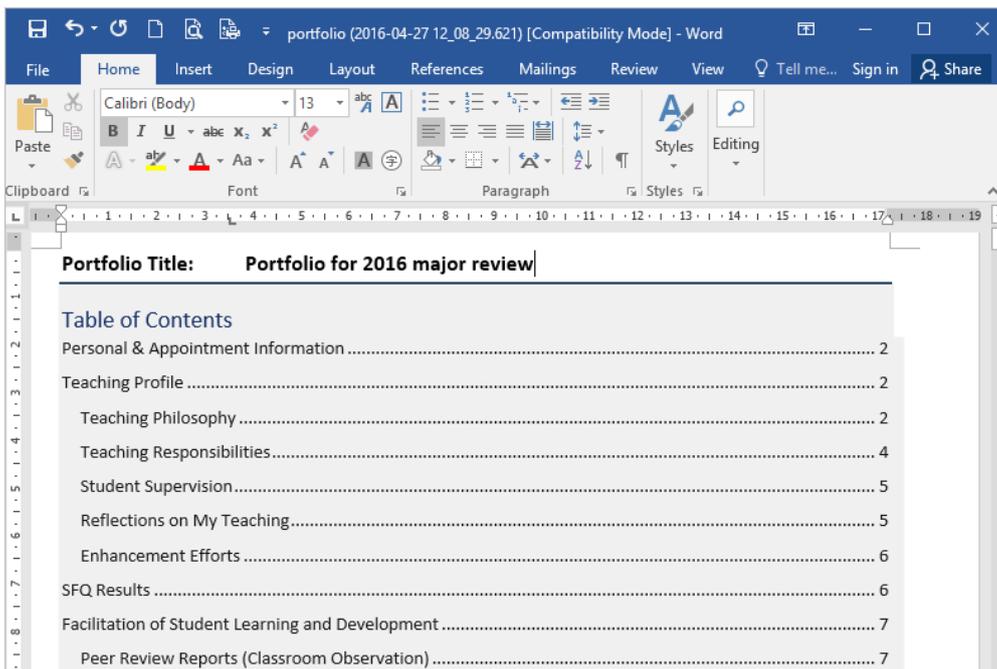
5. Click **OK** in the **Table of Contents** window.



6. Click **OK** to replace the table of contents.

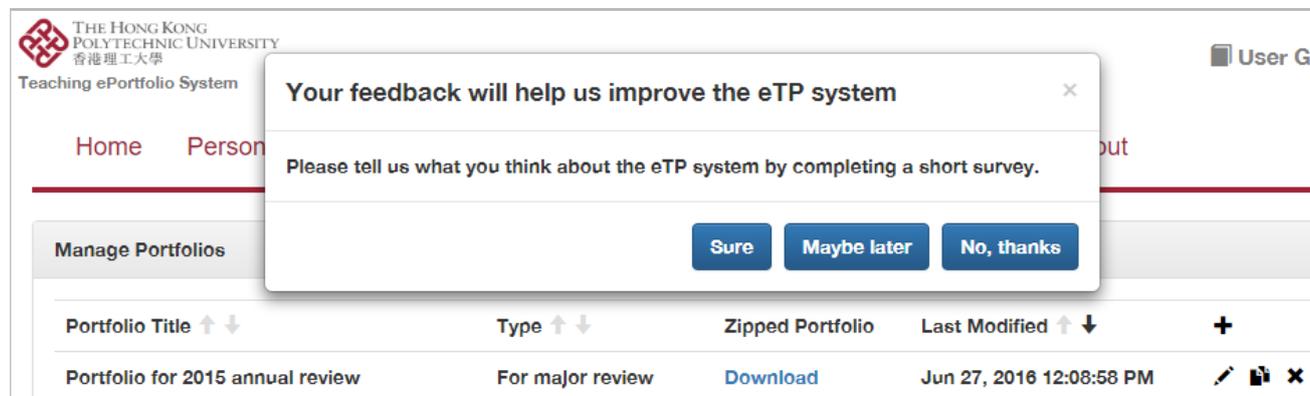


7. The table of contents should now include page numbers.

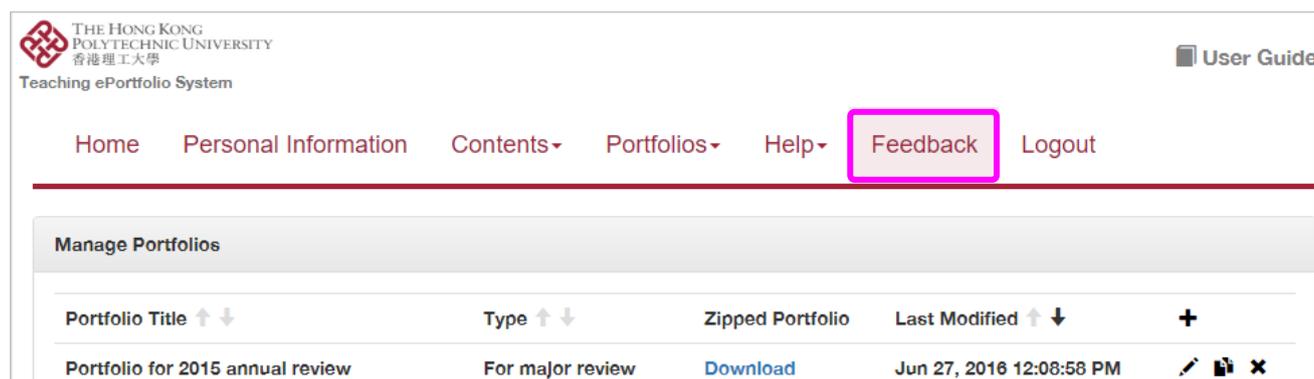


9. Providing feedback

Upon logging out, you will be asked to complete a short survey about the system. Please tell us what you think about the system especially after you have used it to create a portfolio.



You can also access the survey via **Feedback** in the top menu bar. If you have any questions about the system or would like to provide further feedback, please feel free to contact us via etp.support@polyu.edu.hk.



10. Enquiry and support

For enquiry and further assistance with the PolyU eTP system, contact etp.support@polyu.edu.hk with the following information if possible:

- Screenshot – Capture your screen (by holding down Ctrl or Alt key while hitting the Print Screen button for PC, or Ctrl+Shift+Command (Apple)+4 for Macintosh) and paste the image to the email
- Browser address – Copy the URL that is displayed in the address line of your browser and paste it to the email.