

JAMES MADISON UNIVERSITY®

JMU-STAR Reporting Tool User Guide

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JMU STRATEGIC PLAN

The university's strategic plan is comprised of the university's mission, vision, values, strategic priorities, core qualities, university goals and departmental objectives in support of those goals. JMU's strategic plan 2020-2026 is located on PAIR's website. (jmu.edu/pair/strategic-planning/index.shtml)

LOG IN TO JMU-STAR TOOL

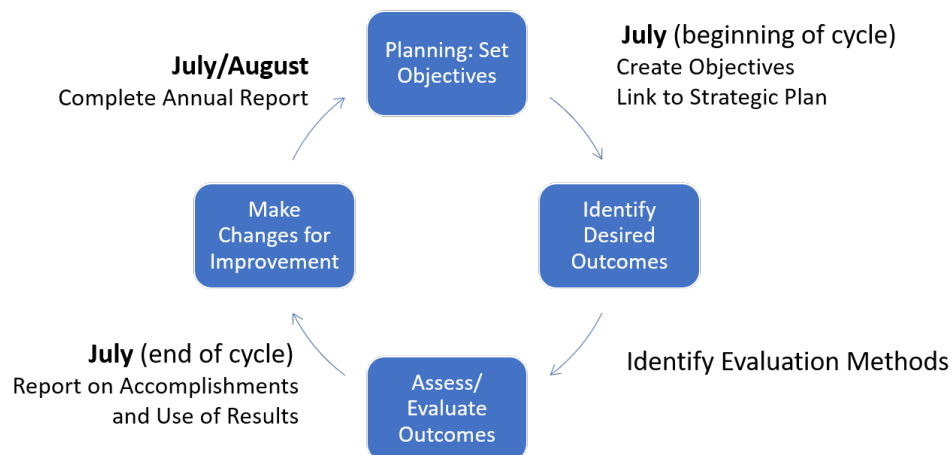
1. From <http://www.jmu.edu/jmuplans>, click on the link for the JMU-STAR Reporting Tool Portal (located in the Resources list on the right).
2. Log in:
 - a. Username is your full JMU email address
 - b. Your default password was set up prior to training

Note: Your JMU-STAR password is not synced with your JMU eID and password; it will not change unless you change it manually. If you have forgotten or want to change your password, contact Tina Grace (gracetm@jmu.edu) or Cindy Chiarello (grovecg@jmu.edu) for assistance.

PLANNING CYCLES AND TIMELINE

Planning cycles align with the university's academic and fiscal years (July 1 – June 30). Therefore, the Current Cycle will always be the current academic and fiscal year. (For example, when completing the End of Year Annual Report in July 2025, your Current Cycle will be the 2024-25 Planning Cycle.)

JMU Planning and Reporting Cycle



July

- Directors/AUHs and AVP/Deans complete annual reporting in JMU-STAR.
- Directors/AUHs submit annual reports to respective AVP/Dean.
- AVP/Deans submit annual reports to respective VP.
- VP's office communicates with AVP/Deans results of initiative requests.
- AVP/Deans report results of initiative requests to Directors.

August

- VPs review annual reports from AVP/dean units and create an annual report for the division.
- VPs, AVP/deans send updated division/college strategic plans to OIR for posting to the JMU-STAR tool so objectives can be written in alignment with JMU and division/college strategic plans.
- Directors/AUHs hold department planning retreat/meetings for the current year and update objectives in JMU-STAR based on these discussions.

September

- September 2022, Compliance Certification due to SACSCOC to include JMU-STAR information from 2019-20, 2020-21 and 2021-22.

October

- Office of Budget Management (OBM) begins the budget process for the following FY by issuing requests for cost-to-continue items, review of permanent budget revisions and reporting authority.
- OBM makes the forms for E&G initiative requests available to departments.
- Institutional Research (OIR) makes initial contact with instructions for writing objectives into the JMU-STAR tool
- for the following FY.

December

- All units enter objectives requiring new funding for the next FY into JMU-STAR.
- Units submit Budget Initiative forms to the respective AVP/Dean; an objective must be in JMU-STAR for each budget initiative submitted.

January

- Budget initiative requests, if accepted, are sent to the OBM by the VP's office.

February

- OBM meets with VP to discuss submitted budget initiatives.
- VP determines which objectives will become strategies on SCHEV six-year plan.
- Annual reporting fields in JMU-STAR open for the current year-end reporting.

May

- OIR distributes end-of-year reporting information (objective outcomes and annual report).
- OBM meets with the VP to communicate results of initiative funding requests.

June

- Directors/AUHs and AVP/Deans begin annual reporting in JMU-STAR based on instructions sent in April/May.
- Directors/AUHs and AVP/Deans complete year-end updates for each objective managed through the JMU-STAR Tool with a specific focus on accomplishments and use of results.
- Directors/AUHs/AVPs/Deans enter objectives for the next FY not requiring new funding into the JMU-STAR tool based on the following parameters:

- Unit mission and major departmental or unit objectives
 - Continue objectives from prior year that include the evaluation of results
 - Action plan items resulting from Program Review
 - Other mutually agreed upon goals and objectives with supervisor
- Board of Visitors approves the university budget.

[Click Here to return to the Table of Contents](#)

CREATE OBJECTIVES

At the beginning of the planning year or during Fall semester, you should use the JMU-STAR tool to create objectives for the upcoming year. Any objective is appropriate for tracking in the planning tool, not just new or innovative ones. The JMU-STAR tool is the vehicle for reporting and tracking objectives so that they are seen and reviewed by university administration.

Effective communication is critical for our planning process to work optimally. Please talk to those you lead about their objectives; both the ones being worked on in the current year and the ones being planned for next year. Ask questions of your supervisor to learn their planning priorities. The plan hinges on the quality of the objectives being executed and their alignment with university goals and core qualities.

NOTE: If you are continuing an objective from a previous planning cycle, see instructions to Copy an Objective. Copying objectives should be done before creating new objectives, otherwise the new objective will be overwritten by the copy process. If you are only creating new objectives, continue with the instructions in this section.

For each objective, enter information for sections 1 (**Objective Name and Link to Plans**) through 1.4 (**Budget Initiative**).

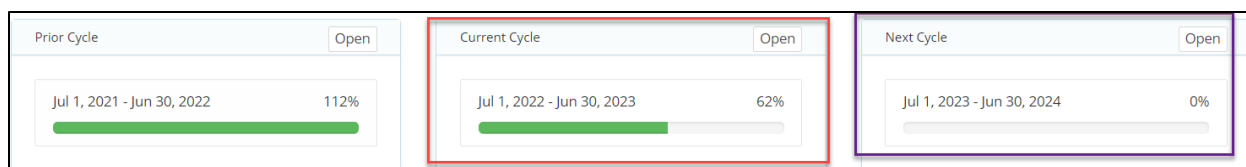
1 Objective Name and Link to Plans
1.1 Steps to meet the objective
1.2 Support for Objective
1.3 Evaluation methods
1.4 Budget Initiative
1.5 Mid-Year Update (optional)
1.6 Objective accomplishments
1.7 Use of results

The other fields (**Objective Accomplishments** and **Use of Results**) are not required to be completed until the end of the academic year. However, you can fill in information as it becomes available.

1. Log in to the JMU-STAR tool.
2. From the Welcome Page, click on **Programs**.



3. Click on your program/unit name.
4. Choose the planning cycle you're working on.
 - a. There are three cycles visible: Past Cycle, Current Cycle, Next Cycle.
 - b. Planning cycles align with the university's academic and fiscal year (July 1 – June 30).



Note: The following steps are re-numbered to align with the objective numbering in the JMU-STAR tool:

1 Objective Name and Link to Plans

Several things happen in this first box of the objective:

- Name the objective: Objective Name - short and long description
- Link the objective to the JMU Strategic Plan, your Division Strategic Plan (if applicable), and your Annual Report
- Add a new objective field set

Name the objective: Objective Name – short and long description

1. Click on the first field (**Objective Name and Link to Plans**) to expand it.

1 Objective Name and Link to Plans Incomplete

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to **Core Quality**, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

[Detailed instructions](#)

Add new Edit Copy Link

2. Brief instructions are located in the opened box. Click on the **Detailed Instructions** link for complete information about entering the objective. A PDF will open in a new window.

Fields and Responses

1 Objective Name and Link to Plans

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to **Core Quality**, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

[Detailed instructions](#)

3. Click **Edit**. A box will open in the current window.

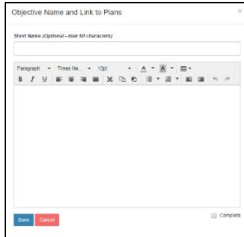
Add new Edit Copy Link

We recommend that you develop your plan and objectives outside of the JMU-STAR Tool. You can then use copy and paste to enter your objective information.

4. Enter the **Short Name** for the objective in the box at the top. Use division/college/department abbreviations before giving a short descriptive title to the objective—this short name is used on

the Budget Initiative form. For example, OP_OIR- Enrollment projections; AA_CAL_WRTC-Resources. (There is a maximum character count of 60 for this field.)

5. Enter the long description for the objective in the large text space. Clearly and concisely describe the objective. Include criteria and make sure the objective specifically states a reason why it is important AND fully describes an outcome, product, deliverable, or result to be achieved.



NOTE: Include learning/use of results from the prior year's objective here or in the "Steps to meet objective" field.

6. Check the box to mark this as complete.
7. Click **Save** after entering the information.

LINK THE OBJECTIVE

You will link each objective to at least two items.

Link Objective to Annual Report

You must link your objectives to your Annual Report Plan in order to include them in your report at the end of the year.

1. For each objective, click on **Objective Name and Link to Plans** to open.
2. Click **Link**.

Objective Name and Link to Plans Respond to Projects Effectively and Efficiently (PR 1)

INCLUDE THE USE OF RESULTS FROM PRIOR YEAR IN THE OBJECTIVE DESCRIPTION or STEPS TO MEET OBJECTIVE FIELDS, IF APPROPRIATE.

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to Core Quality, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

Detailed instructions

2 Plan links

Complete

Add new Edit Copy **Link**

3. Click **Plans**.

Manage Links Click [X] next to a link to remove.

Plans + Program Outcomes + External Outcomes + GenEd Outcomes +

4. Click on the drop-down menu and choose the Annual Report for your division.

1 Select the plan you want to link to

Academic Affairs Annual Report

Academic Affairs Annual Report

Access - Enrollment Mgt Annual Rpt

Admin and Finance Annual Rpt

Graduate Education Strat Plan 2016

JMU Strategic Plan 2020-2026

JMU Strategic Priority 4

Objectives

President's Division Annual Report

Student Affairs Annual Report

University Advancement Annual Rpt

5. Check the box next to your unit. (This will include the objective in your annual report.) The list is organized by AVP/Dean level. Follow guidelines from your AVP/Dean for instructions about linking to their annual report. Choose your AVP/Dean from the list to link to their annual report.

2 Select an available goal or section in the target plan

☐ CAL - ENG CAL, English Department

☐ CAL - HIST CAL, History Department

☐ CAL Dean College of Arts

☐ CAL - SMAD School of Media Arts and Design

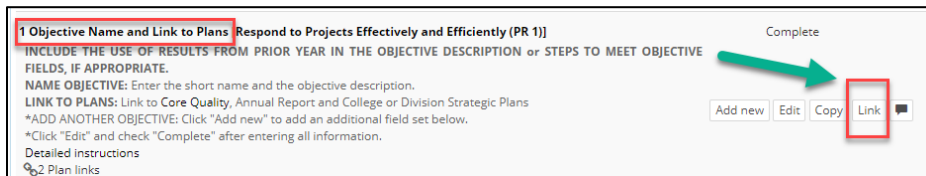
6. Scroll to the bottom and click **Save**.

NOTE: VPs, AVPs, Deans and Department Heads—be sure to include in your annual report the activities and accomplishments of units that report to you that do not create objectives or annual reports in JMU-STAR. (Check the organizational chart for these areas that include Centers, Clinics, and Institutes.)

Link Objective to JMU Strategic Plan

A single objective can be linked to several university goals in the strategic plan.

1. For each objective, click on **Objective Name and Link to Plans** to open.
2. Click **Link**.



1 Objective Name and Link to Plans Respond to Projects Effectively and Efficiently (PR 1)

INCLUDE THE USE OF RESULTS FROM PRIOR YEAR IN THE OBJECTIVE DESCRIPTION or STEPS TO MEET OBJECTIVE FIELDS, IF APPROPRIATE.

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to Core Quality, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

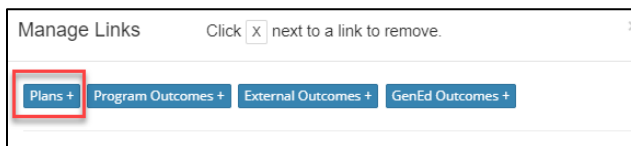
Detailed instructions

2 Plan links

Complete

Add new Edit Copy Link

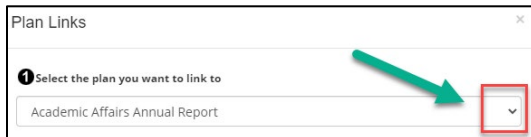
3. Click **Plans**.



Manage Links Click [X] next to a link to remove.

Plans + Program Outcomes + External Outcomes + GenEd Outcomes +

4. Click the drop down to select a plan.



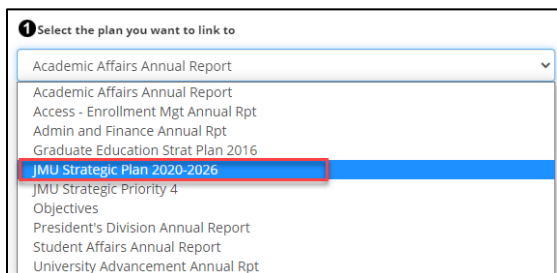
Plan Links

1 Select the plan you want to link to

Academic Affairs Annual Report

▼

5. Select JMU Strategic Plan 2020-2026.



1 Select the plan you want to link to

Academic Affairs Annual Report

Academic Affairs Annual Report

Access - Enrollment Mgt Annual Rpt

Admin and Finance Annual Rpt

Graduate Education Strat Plan 2016

JMU Strategic Plan 2020-2026

JMU Strategic Priority 4

Objectives

President's Division Annual Report

Student Affairs Annual Report

University Advancement Annual Rpt

6. Select all university goals that this objective supports. A detailed list of the Core Qualities and Goals can be viewed at <https://www.jmu.edu/jmuplans/core-qualities-goals.shtml>
 - a. There is an unpublished *Core Quality 12: Other endeavors in support of the university's mission*. Use this core quality only if the objective does not fit into any of the other core qualities.

2 Select an available goal or section in the target plan

<input type="checkbox"/>	1A-national university Goal 1A-national university We will be recognized as a <i>national university</i> known for outstanding and innovative programs and services.
<input type="checkbox"/>	1B-carnegie doctoral Goal 1B-Carnegie Doctoral Classification The university will achieve and maintain status as a Carnegie Doctoral University in order to advance research, the quality of the undergraduate experience, the effectiveness of the graduate school and the pursuit of national prominence.
<input type="checkbox"/>	1C-employment opportunities Goal 1C-employment opportunities nationally and internationally Our students will have access to employment opportunities nationally and internationally.

7. Scroll to the bottom and click **Save**.

Link Objective to Division Strategic Plan

If your division has a strategic plan, follow your VP's guidelines for linking to your division's strategic plan.

7. For each objective, click on **Objective Name and Link to Plans** to open.
8. Click **Link**.

1 Objective Name and Link to Plans Respond to Projects Effectively and Efficiently (PR 1)]

INCLUDE THE USE OF RESULTS FROM PRIOR YEAR IN THE OBJECTIVE DESCRIPTION or STEPS TO MEET OBJECTIVE FIELDS, IF APPROPRIATE.

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to **Core Quality**, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

Detailed instructions

2 Plan links

Complete

Add new Edit Copy **Link**

9. Click **Plans**.

Manage Links Click ☐ next to a link to remove.

Plans + Program Outcomes + External Outcomes + GenEd Outcomes +

10. Click the drop down to select a plan.

Plan Links

1 Select the plan you want to link to

Academic Affairs Annual Report

▼

11. Select your division's strategic plan.

1 Select the plan you want to link to

Strategic Plan: Academic Affairs 23
Academic Affairs Annual Report
Access - Enrollment Mgt Annual Rpt
Admin and Finance Annual Rpt
JMU Strategic Plan 2020-2026
JMU Strategic Priority 4
President's Division Annual Report
Strategic Plan: Academic Affairs 22
Strategic Plan: Academic Affairs 23
Student Affairs Annual Report
University Advancement Annual Rpt

12. Scroll to the bottom and click **Save**.

The Plan link icon shows the number of plans linked to this first objective. Click on it to see the linkage information.

Fields and Responses

Copy View PDF Show All

1 Objective Name and Link to Plans

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to Core Quality, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

Add new Edit Copy Link Tag

1 Plan link

1.1 Steps to meet the objective

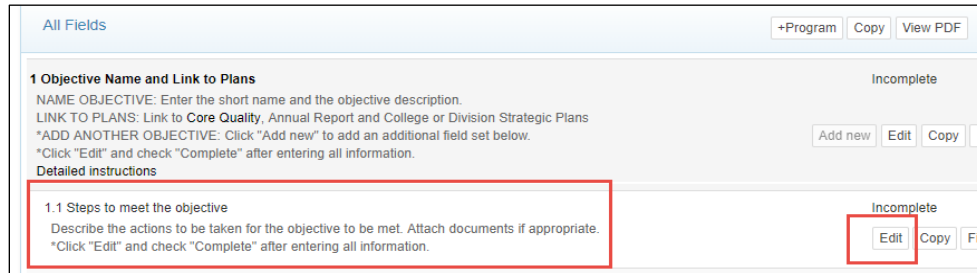
Incomplete

Incomplete

1.1 Steps to meet the objective

Describe the actions to be taken for the objective to be met. (You can attach supporting documents if appropriate.) Include “Use of Results” from the prior year if appropriate.

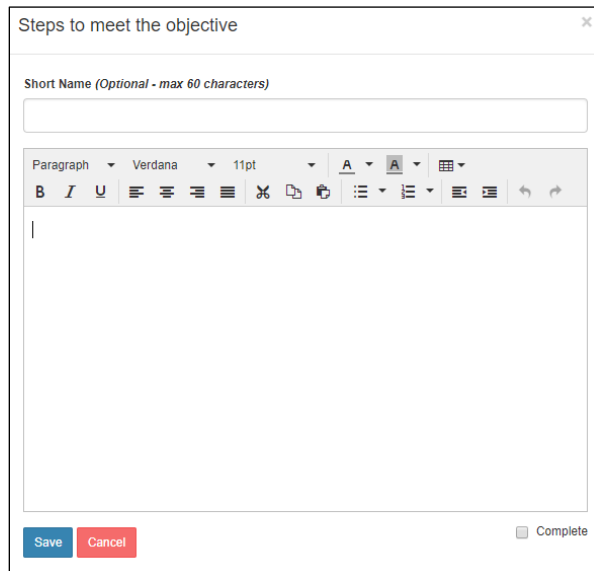
1. Click on the **Steps to meet the objective** field. Brief instructions are located in the opened box.



The screenshot shows a web interface titled "All Fields" with buttons for "+Program", "Copy", and "View PDF". It lists two objective fields. The first field, "1 Objective Name and Link to Plans", is marked "Incomplete" and has buttons for "Add new", "Edit", "Copy", and "Link". The second field, "1.1 Steps to meet the objective", is also marked "Incomplete" and has buttons for "Edit", "Copy", and "File". Both fields have detailed instructions on how to use them. The "Steps to meet the objective" field and its "Edit" button are highlighted with red boxes.

2. Click **Edit**.
3. Enter in the large text area the steps the unit will take to achieve the objective.
It is not necessary to enter information into the Short Name box.

- Fully describe the key steps to reach the objective. Make sure all key steps include specific detail to be measurable and state a specific timeframe for completion.
- Use the formatting tools to number the steps if needed.



The screenshot shows a modal window titled "Steps to meet the objective". It contains a "Short Name (Optional - max 60 characters)" text field. Below it is a rich text editor with a toolbar including Paragraph, Verdana, 11pt, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Undo/Redo. At the bottom are "Save", "Cancel", and "Complete" buttons.

4. Check the box to mark this as complete.
5. Click **Save** after entering the information.

1.2 Support for Objective

This field indicates that you intend to contact another office at JMU for support with this objective. The other office(s) are not notified through this tool. This serves as a reminder that you need to contact them.

1. Click on the **Support for Objective** field.

1.2 Support for Objective

Incomplete

Indicate the university office that needs to provide support for this objective: Information Technology, University Communications & Marketing, University Advancement, Libraries, Facilities Management. If more than one of these departments, choose the primary department. Please contact all departments that are needed to support this objective.

Edit

Copy

2. Click **Edit**.
3. Select the applicable choice from the list.

No support needed from listed departments

Information Technology

University Communications and Marketing

Facilities Management

University Advancement

JMU Libraries

More than one or another supporting department

4. Check the box to mark this as complete.
5. Click **Submit** in the bottom left to save this information.

1.3 Evaluation Methods

1. Click on the **Evaluation Methods** field.

1 Objective Name and Link to Plans	Incomplete
1.1 Steps to meet the objective	Incomplete
1.2 Support for Objective	Incomplete
1.3 Evaluation methods	Incomplete
1.4 Budget Initiative	Incomplete
1.5 Mid-Year Update (optional)	Incomplete
1.6 Objective accomplishments	Incomplete
1.7 Use of results	Incomplete

2. Click **Edit**.

1.3 Evaluation methods

Incomplete

Provide detail of the methods that will be used to measure if the objective is met or not. Attach files if appropriate.
*Click "Edit" and check "Complete" after entering all information.

Edit

Copy

File +

Drop +

Tag

- In the large text area, enter the methods you will use to evaluate the success of this objective.
- Describe the specific, systematic evaluation methods that will be used to measure change.
- Include how the objective will be evaluated/assessed using specific, systematic evaluation method(s) that are clearly linked to expected change/results.

3. Check the box to mark this as complete.
4. Click **Save** after entering the information.

1.4 Budget Initiative

Use this field if your department is submitting a budget initiative. This is applicable for those new objectives that apply to the next cycle (not the current cycle).

1. Click on the **Budget Initiative** field.

1 Objective Name and Link to Plans	Incomplete
1.1 Steps to meet the objective	Incomplete
1.2 Support for Objective	Incomplete
1.3 Evaluation methods	Incomplete
1.4 Budget Initiative	Incomplete
1.5 Mid-Year Update (optional)	Incomplete
1.6 Objective accomplishments	Incomplete
1.7 Use of results	Incomplete

2. Click **Edit**.

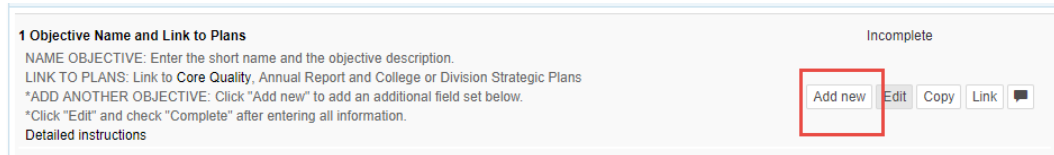
3. Select **Yes** or **No** if you are submitting a budget initiative for this objective. Don't forget to fill out the Budget Initiative form.

4. Check the box to mark this as complete.
5. Click **Save** after entering the information.

Add a new objective field set

When beginning a new Planning Cycle, the JMU-STAR Tool contains only one field set for an objective. To add more than one objective, you must open **Objective Name and Link to Plans** in the first objective to add a new objective field set.

1. Click **Add new** to one or more additional field sets



1 Objective Name and Link to Plans Incomplete

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to **Core Quality**, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

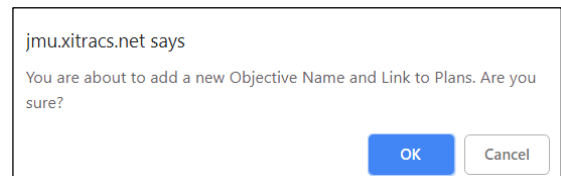
*Click "Edit" and check "Complete" after entering all information.

[Detailed instructions](#)

Add new Edit Copy Link

2. Click OK to add a new field set.

The new field set will be below the existing field set(s).



jmu.xitracs.net says

You are about to add a new Objective Name and Link to Plans. Are you sure?

OK Cancel

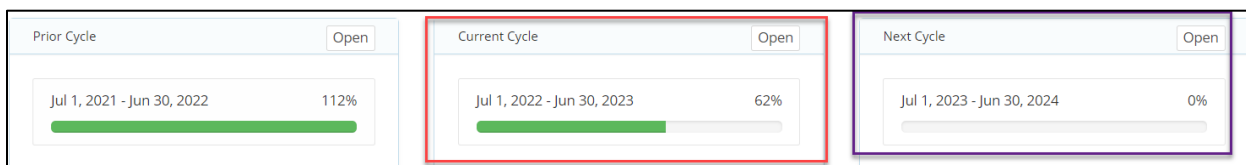
COPY OBJECTIVES

Objectives can be continued from a previous planning cycle. This process should be done before creating new objectives, otherwise the new objective will be overwritten by the copy process.

1. Log in to the JMU-STAR tool.
2. From the Welcome Page, click on **Programs**.

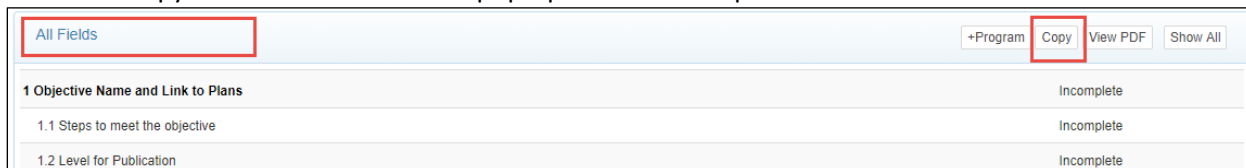


3. Click on your program/unit name.
4. Choose the planning cycle you're working on (for example, if you are creating objectives for the next cycle, choose Next Cycle).
 - a. There are three cycles visible: Past Cycle, Current Cycle, Next Cycle.
 - b. Planning cycles align with the university's academic and fiscal year (July 1 – June 30).

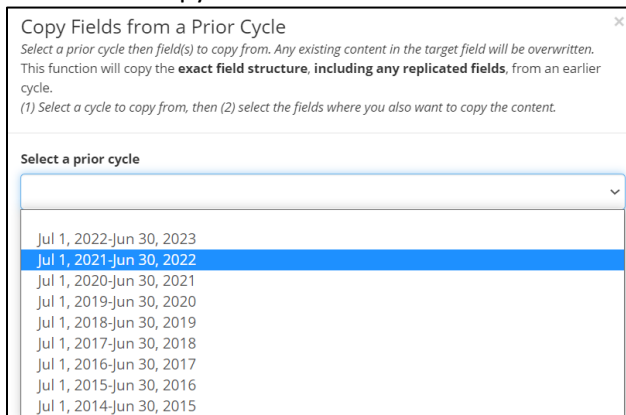


Copy Existing Objectives

5. Click "Copy" in the All Fields row. A pop-up window will open.



6. From the **Select a prior cycle** dropdown, choose the year where your objectives are that you want to copy.



7. Check all objective fields for the specific objectives that you want to copy.
 - a. **NOTE – you should not copy Objective Accomplishments or Use of Results, these should be original for each planning cycle.**

8. Scroll to the bottom of the list. Click “Plans” to copy existing links from the previous cycle’s objective. Do not click “Mark copied fields complete”.
9. Once you have made your selections, click “Submit.”

Your copied objectives should now be viewable in the planning cycle you are working on.

Review and Update Copied Objective Information

Review and update the information to reflect what the unit is doing in the current year (steps follow).

10. If needed, update the objective name and description. Click **Edit**.

- a. Modify the Short Description for the Objective in the box at the top (just a few words; there is a maximum character count of 60). The Short Description is used on the Budget Initiative form.
- b. Modify the Long Description for the Objective in the large text space.

NOTE: Include learning/use of results from the prior year's objective here or in the "Steps to meet objective" field.

11. Check the box to mark this as complete.
12. After the information has been entered, Click **Save**.

13. Repeat this process for updating other objective fields as necessary.

1.1 Steps to meet the objective
1.2 Level for Publication
1.3 Key Word Tags (optional)
1.4 Collaboration/Integration (optional)
1.5 Evaluation methods
1.6 Budget Initiative

[Click Here to return to the Table of Contents](#)

ANNUAL REPORT

The annual report highlights your accomplishments over the past year and includes categories that align with the university's strategic plan or other areas of emphasis for JMU.

At the end of the academic and fiscal planning year (usually starting in April), you should use the JMU-STAR tool to update your objectives and create your annual report. This has five steps:

1. [Verify Current Cycle Objectives Are Linked](#)
2. [Update Current Cycle Objectives](#)
3. [Enter Annual Report Information](#)
4. [Submit Annual Report](#)

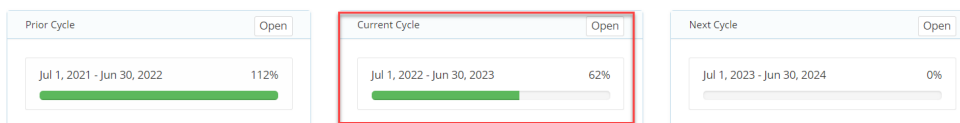
Verify Current Cycle Objectives Are Linked

Verify your Current Cycle Objectives are linked to both your annual report and the JMU Strategic Plan 2020-2026.

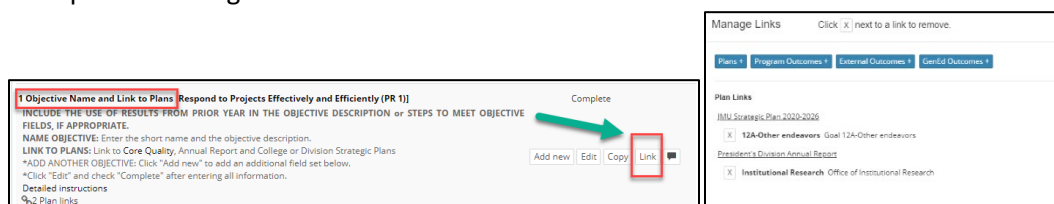
1. From the Welcome Page, click on **Programs**.



2. Select your program to open the drop-down menu.
3. Choose the Current Cycle.



4. Each objective should be linked to multiple items. Click on **Objective Name and Link to Plans** to open the dialogue box.



5. Click **Link** to show the plans this objective is linked to.
 - a. If all of your objectives are already linked to BOTH JMU Strategic Plan 2020-2026 goals AND your Annual Report, you can skip ahead to **Review/Update/Enter Next Cycle Objectives**.
 - b. If your objectives are not linked to BOTH the JMU Strategic Plan 2020-2026 AND your Annual Report, continue with the steps below.

LINK THE OBJECTIVE

You will link each objective to at least two items.

Link Objective to Annual Report

You must link your objectives to your Annual Report Plan in order to include them in your report at the end of the year.

1. For each objective, click on **Objective Name and Link to Plans** to open.
2. Click **Link**.

Objective Name and Link to Plans Respond to Projects Effectively and Efficiently (PR 1)

INCLUDE THE USE OF RESULTS FROM PRIOR YEAR IN THE OBJECTIVE DESCRIPTION or STEPS TO MEET OBJECTIVE FIELDS, IF APPROPRIATE.

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to Core Quality, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

Detailed instructions

2 Plan links

Complete

Add new Edit Copy **Link**

3. Click **Plans**.

Manage Links Click [X] next to a link to remove.

Plans + Program Outcomes + External Outcomes + GenEd Outcomes +

4. Click on the drop-down menu and choose the Annual Report for your division.

1 Select the plan you want to link to

Academic Affairs Annual Report

Academic Affairs Annual Report

Access - Enrollment Mgt Annual Rpt

Admin and Finance Annual Rpt

Graduate Education Strat Plan 2016

JMU Strategic Plan 2020-2026

JMU Strategic Priority 4

Objectives

President's Division Annual Report

Student Affairs Annual Report

University Advancement Annual Rpt

5. Check the box next to your unit. (This will include the objective in your annual report.) The list is organized by AVP/Dean level. Follow guidelines from your AVP/Dean for instructions about linking to their annual report. Choose your AVP/Dean from the list to link to their annual report.

2 Select an available goal or section in the target plan

☐ CAL - ENG CAL, English Department

☐ CAL - HIST CAL, History Department

☐ CAL Dean College of Arts

☐ CAL - SMAD School of Media Arts and Design

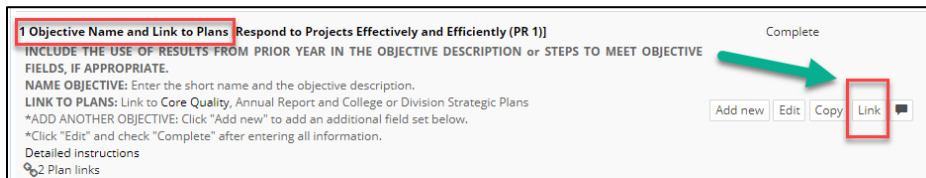
6. Scroll to the bottom and click **Save**.

NOTE: VPs, AVPs, Deans and Department Heads—be sure to include in your annual report the activities and accomplishments of units that report to you that do not create objectives or annual reports in JMU-STAR. (Check the organizational chart for these areas that include Centers, Clinics, and Institutes.)

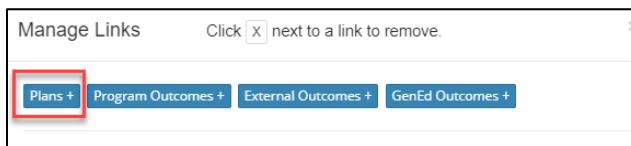
Link Objective to JMU Strategic Plan

A single objective can be linked to several university goals in the strategic plan.

8. For each objective, click on **Objective Name and Link to Plans** to open.
9. Click **Link**.



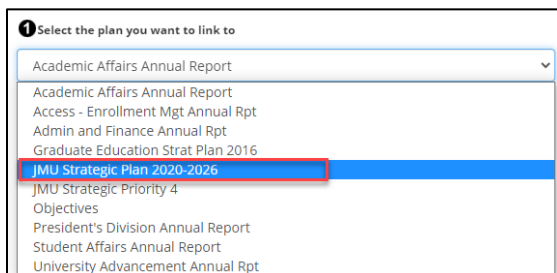
10. Click **Plans**.



11. Click the drop down to select a plan.



12. Select JMU Strategic Plan 2020-2026.



13. Select all university goals that this objective supports. A detailed list of the Core Qualities and Goals can be viewed at <https://www.jmu.edu/jmuplans/core-qualities-goals.shtml>
 - a. There is an unpublished *Core Quality 12: Other endeavors in support of the university's mission*. Use this core quality only if the objective does not fit into any of the other core qualities.

2 Select an available goal or section in the target plan

<input type="checkbox"/>	1A-national university Goal 1A-national university We will be recognized as a <i>national university</i> known for outstanding and innovative programs and services.
<input type="checkbox"/>	1B-carnegie doctoral Goal 1B-Carnegie Doctoral Classification The university will achieve and maintain status as a Carnegie Doctoral University in order to advance research, the quality of the undergraduate experience, the effectiveness of the graduate school and the pursuit of national prominence.
<input type="checkbox"/>	1C-employment opportunities Goal 1C-employment opportunities nationally and internationally Our students will have access to employment opportunities nationally and internationally.

14. Scroll to the bottom and click **Save**.

Link Objective to Division Strategic Plan

If your division has a strategic plan, follow your VP's guidelines for linking to your division's strategic plan.

7. For each objective, click on **Objective Name and Link to Plans** to open.
8. Click **Link**.

1 Objective Name and Link to Plans Respond to Projects Effectively and Efficiently (PR 1)]

INCLUDE THE USE OF RESULTS FROM PRIOR YEAR IN THE OBJECTIVE DESCRIPTION or STEPS TO MEET OBJECTIVE FIELDS, IF APPROPRIATE.

NAME OBJECTIVE: Enter the short name and the objective description.

LINK TO PLANS: Link to **Core Quality**, Annual Report and College or Division Strategic Plans

*ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.

*Click "Edit" and check "Complete" after entering all information.

Detailed instructions

2 Plan links

Complete

Add new Edit Copy **Link**

9. Click **Plans**.

Manage Links Click [X] next to a link to remove.

Plans + Program Outcomes + External Outcomes + GenEd Outcomes +

10. Click the drop down to select a plan.

Plan Links

1 Select the plan you want to link to

Academic Affairs Annual Report

▼

11. Select your division's strategic plan.

1 Select the plan you want to link to

Strategic Plan: Academic Affairs 23
Academic Affairs Annual Report
Access - Enrollment Mgt Annual Rpt
Admin and Finance Annual Rpt
JMU Strategic Plan 2020-2026
JMU Strategic Priority 4
President's Division Annual Report
Strategic Plan: Academic Affairs 22
Strategic Plan: Academic Affairs 23
Student Affairs Annual Report
University Advancement Annual Rpt

12. Scroll to the bottom and click **Save**.

The Plan link icon shows the number of plans linked to this first objective. Click on it to see the linkage information.


Fields and Responses Copy View PDF Show All

1 Objective Name and Link to Plans Incomplete

NAME OBJECTIVE: Enter the short name and the objective description.
 LINK TO PLANS: Link to Core Quality, Annual Report and College or Division Strategic Plans
 *ADD ANOTHER OBJECTIVE: Click "Add new" to add an additional field set below.
 *Click "Edit" and check "Complete" after entering all information.

Add new Edit Copy Link Tag

Details Instructions

1 Plan link 

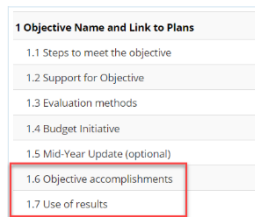
1.1 Steps to meet the objective Incomplete

Update Current Cycle Objectives

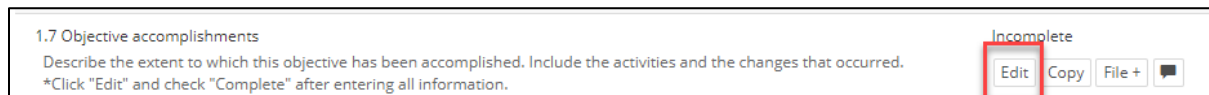
Update your Current Cycle objectives with accomplishments and how you will use results.

1.6 Objective Accomplishments

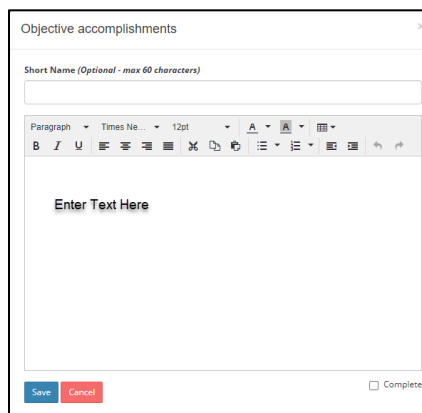
1. For each objective in the Current Cycle, click on **Objective Accomplishments**.



2. Click **Edit**.



- a. In the large text area, describe the extent to which this objective has been accomplished. The description should fully communicate the extent to which each of the specific activities outlined in Steps to Reach the Objective have been achieved and the changes that occurred. Include analysis of what happened.
3. Check the box to mark this as complete.
 4. Click **Save**.



1.7 Use of Results

5. For each objective, click on **Use of Results**.
6. Click **Edit**.

- In the large text area, reflect on how well the objective was accomplished during this year.
- Describe how the evaluation results will be used to bring about future improvement or change.
- Provide details of what will be changed in the next cycle to further enhance the results of this objective.
- Fully and clearly connect current results with a specific future direction; set continued or new objective(s) for the following year.

Example - focus on improvement: Based on (findings, analysis), the (unit, office, department, program) will (enhance, enrich, further, advance) the (time, cost, quality, quantity) of (function, program, activity).

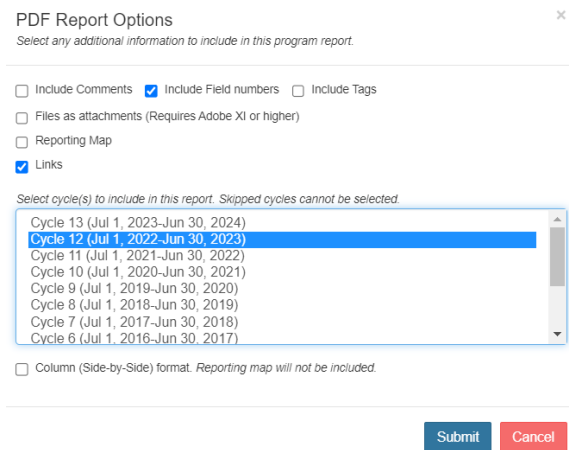
- Check the box to mark this as complete.
- Click **Save**.

Create a PDF of the Current Objectives (Optional)

- In the **All Fields** bar above objective 1, click on **View PDF**.



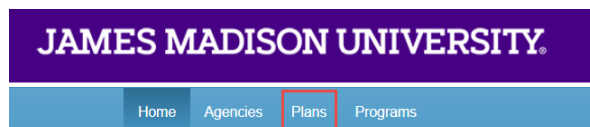
- A pop-up window will open with **PDF Report Options**.
 - Select Include Field Numbers, Links, and the Planning Cycle.



- Click **Submit**. A new tab will open in your browser with the PDF.
- Download/Save the file to your computer.

Enter Annual Report Information

- From the Welcome Page, click on **Plans**.



2. Click your division name then your unit name to create/edit the annual report. Note: a template of the annual report fields is available on the JMU Plans website.
3. Click on each field to expand it, then click **Edit**.

1 Unit Head
Incomplete

[Edit](#)

- a. Note: not every field may be applicable to your unit.
- b. Required fields: **1Unit Head, 2Report Year, 3Unit Mission, 4Executive Summary**. Complete the other fields as they apply to your unit. These fields align with the university's strategic plan or other areas of emphasis for JMU.
- c. The 7 Addenda may include:
 - APR/Program Review Action Plan
 - APT assessment report
 - Statistical Summary that includes major and faculty data (arrives from Dean in late May)

JAMES MADISON UNIVERSITY

Home Agencies Plans Programs
Logout

Cindy Chiarello
Glossary
Xitracx

PAIR Planning, Analytics, Institutional Research
[President's Division Annual Report]
Your role in this plan section is Editor
Reporting Cycle: Plan Cycle 2024-2025
[View PDF](#) [Close](#)

Fields and Responses
[Link](#) [Show All](#)

1 Unit Head	Incomplete
2 Report Year	Incomplete
3 Unit Mission	Incomplete
4 Executive Summary	Incomplete
5 Unit Accomplishments	Incomplete
5.1 Major Unit Accomplishments	Incomplete
5.2 Engagement	Incomplete
5.2.1 Community Engagement	Incomplete
5.2.2 Civic Engagement	Incomplete
5.2.3 Engaged Learning	Incomplete
5.3 Leadership Development	Incomplete
5.4 Innovation	Incomplete
5.5 Inclusive Excellence	Incomplete
5.6 Programs or Services Rankings and Recognitions	Incomplete
5.6.1 National or international rankings of programs/services	Incomplete
5.6.2 Other national or international recognitions	Incomplete
5.6.3 Other recognitions (university, state, etc)	Incomplete
5.7 Early Student Success	Incomplete
5.8 Efficiencies	Incomplete
5.9 Comprehensive Campaign	Incomplete
5.10 Other Noteworthy Accomplishments	Incomplete
6 Individual Faculty/Staff Honors and Accomplishments	Incomplete
6.1 National or International Rankings and Recognitions	Incomplete
6.1.1 Positions of leadership in national or international organizations held by faculty/staff/students.	Incomplete
6.1.2 National or international awards received by faculty/staff/students	Incomplete
6.1.3 Other rankings and recognitions of faculty/staff/students	Incomplete
6.2 Scholarly and Service Accomplishments and Other Honors	Incomplete
7 Addenda	Incomplete

Submit Annual Report

Create Annual Report PDF

From the Plans tab, you are able to create a PDF of your annual report.

1. Once you have entered information for all applicable fields, click **View PDF** in the plan header.



2. A pop-up window will open with **PDF Plan Report Options**.

Select:

- Plan Cycle 2022-2023
- Title Page
- Field Numbers
- Files as attachments
- Linked Plans
- Linked Programs (with Linked Program Responses and Child-field Responses)
- Program Reporting Cycles
 - Select the current cycle (year ending)
 - Select the next cycle (next year)

A screenshot of the 'PDF Plan Report Options' pop-up window. It has a title bar and a close button. The main content area includes a 'Select Plan Cycle' dropdown menu currently set to 'Plan Cycle 2022-2023 (4) Current'. Below this are several checkboxes: 'Title Page' (unchecked), 'Comments' (unchecked), 'Field Numbers' (checked), 'Files as attachments (Requires Adobe XI or higher)' (checked), 'Linked Plans' (checked), and 'Linked Programs including:' (checked). Under 'Linked Programs including:', there are three sub-options: 'Linked Program Responses' (checked) and 'Child-field Responses' (checked). Below these is a text input field for 'For program reporting cycle(s): Use Ctrl or Cmd key to select multiple cycles.' and a list box containing several cycles, with '#12 (Jul 1, 2022/Jun 30, 2023)' and '#13 (Jul 1, 2023/Jun 30, 2024)' highlighted in blue. At the bottom right are 'Submit' and 'Cancel' buttons.

3. Click **Submit**. A new tab will open in your browser with the PDF.
4. Download/Save the file to your computer.

Your Annual Report is now ready for submission to your AVP/Dean or VP.

NOTE: Contact your AVP/Dean for information on how they prefer to receive your Annual Report.

[Click Here to return to the Table of Contents](#)

HELP

If you need assistance with the JMU-STAR tool or the planning process, please contact:

Tina Grace gracetm@jmu.edu

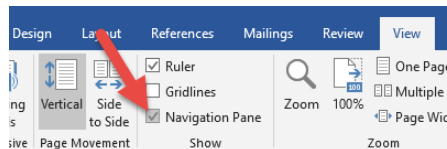
Cindy Chiarello grovecg@jmu.edu

ABOUT THIS MANUAL

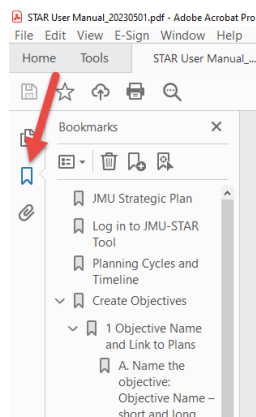
Using Document Navigation

This document has been created using headings to allow for easy navigation to specific areas of interest.

- To use the navigation pane in Microsoft Word, choose the **View** ribbon (the top of the screen) and check the box next to **Navigation Pane**. The navigation pane will appear to the left.



- To use the navigation in Adobe, click on the Bookmarks icon on the left. The navigation pane will appear to the left.



From here, you can click on a heading and the document will take you to that section.

Alternatively, you can click in the **Table of Contents** on the next pages to go directly to a desired section.

Locating Specific Terms and Nomenclature

Care has been taken in writing this manual to use consistent nomenclature with what you will find in the JMU-STAR reporting tool and in other information you receive from Planning, Analytics, and Institutional Research (PAIR). To quickly locate information on a specific topic, use Ctrl+F on your keyboard to open the **Find** box, then type the phrase you are searching for. For example, if you want to create a PDF of your objectives, use Ctrl+F, then type PDF. The finder will show you anywhere in the document that the letters “PDF” appear.

Words in **bold** indicate exact wording of an item within the JMU-STAR tool and specific sections of this manual. These bold terms are often used to guide you to specific links within the tool or to indicate which command to click on, or to direct you to another section of this manual for specific directions.

Maintenance of This Manual

This manual is intended to be a useful and easy resource for JMU-STAR users. Please send any corrections, updates, or suggestions for usability of this manual to Cindy Chiarello at grovecg@jmu.edu or Tina Grace at gracetm@jmu.edu.

If your unit has experienced changes in reporting, organization, or changed its name, please contact Tina Grace (gracetm@jmu.edu) or Cindy Chiarello (grovecg@jmu.edu) so that we can make the appropriate changes in the JMU-STAR tool.

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