James Madison University

Strategic Accountability and Reporting Tool

JMU-STAR

User Manual

Revision Date: April 2016

Table of Contents

Using This Manual

This manual is set up in two parts:

Part I: Planning contains step-by-step instructions for procedures to enter unit objectives, modify objectives during the planning year, and record results of unit objectives.

Part II: Reporting contains step-by-step instructions on procedures for entering information to be included in annual reports, the President's Annual Accomplishments Report, and Carnegie Engagement Reports.

Part III: Planning Cycle Processes describes JMU-STAR processes that occur each plan year. (*NOTE: This section is still being written as of April 2016*.)

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

Alternatively, you can Ctrl+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 tool and in other information you receive from the Office of Institutional Research (OIR) and the office of University Planning. 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.

Introduction: Planning at James Madison University

As a public university, JMU carries a great deal of responsibility. Not only in light of Madison's words, but also because the public places a great trust in us. All of our planning focuses squarely on our mission, vision and values. They are at the heart of all we do and who we are.

Mission, Vision, Values

Mission: We are a community committed to preparing students to be educated and enlightened citizens who lead productive and meaningful lives.

Vision: To be the national model for the engaged university: engaged with ideas and the world.

Values:

Academic Quality: We are dedicated to exemplary learning experiences because they are the essence of our mission.

Community: We thrive when we collaborate, respect and serve others, and appreciate our interconnectedness.

Diversity: We strive to be an inclusive community that values the richness of all individuals and perspectives.

Excellence: We seek to be innovative and to perform at the highest levels.

Integrity: We pursue ethical reasoning because it is essential to meaningful citizenship.

Student Focus: We provide experiences that challenge and support students.

Who We Are

(This purpose narrative helps guide our planning)

James Madison University is a community of higher learning that reaches beyond the pursuit of instruction, developing well-rounded citizens who make a real difference in the world. We are continually building a culture marked by strong relationships, engagement, teaching excellence, ethical reasoning, discovery and a commitment to the liberal arts and sciences. Students often describe their experience as one where we hold the door open for each other. We see this as both literal – reflecting a warm and welcoming community – and figurative, where we open opportunities for our students by fostering the cultivation of ideas in and beyond the classroom. We offer the benefits and resources of large scale and mass while providing close relationships between students and faculty – the benefits of big with a small feel. We will be the national model of the engaged university because we believe engagement is a critical pathway to student enlightenment. As a reflection of our namesake, our most important intended outcome is to help create high-character citizen-leaders who contribute to improving the human condition.

JMU Planning and Reporting Cycle

January

- AVPs/Deans meet with Directors/AUHs to discuss objectives to set for the next FY.
- Objectives for the next FY requiring funding are entered into JMU-STAR.
- Budget initiative forms for those objectives requiring funding that have been entered into the planning tool are submitted to the respective AVP/Dean.
- Objectives for the next FY not requiring funding are entered into the planning tool based on the following parameters:
    - Major departmental or unit objectives
    - Action plan items resulting from Program Review
    - Other mutually agreed upon goals and objectives with supervisor

February

- Budget initiative requests are sent to the OBM by the VP's office.
- OBM meets with VP's office to discuss submitted initiatives.
- VP determines which objectives will become strategies on SCHEV six-year plan.

May

- OIR distributes end-of-year information packet.
- OBM meets with the VP to communicate results of initiative funding requests.

June

- Directors/AUHs and AVPs/Deans complete June updates for each objective managed through the JMU-STAR planning tool with a specific focus on accomplishments and use of results.
- Directors/AUHs and AVPs/Deans review the next FY objectives that were entered in January and update as necessary.
- Board of Visitors approves university budget.

July

- Directors/AUHs and AVPs/Deans complete annual reporting based on instructions sent in May.
- Directors/AUHs submit annual reports to respective AVP/Dean using JMU-STAR
- AVPs/Deans submit via JMU-STAR the annual reports, including previous FY key accomplishments for the President's Annual Accomplishments Report. to respective VP.
- VP's office communicates with AVPs/Deans results of initiative requests.
- AVPs/Deans report results of initiative requests to Directors/AUHs.
- VPs submit final annual accomplishments report via JMU-STAR to the President, who uses the information for presentations, speeches, development, etc.

August

- Updates are made to objectives in the JMU-STAR based on planning retreat/meetings.

November

- 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.
- Forms for E&G initiative requests are made available to departments.
- Send updated division/unit strategic plan to OIR for posting to the planning tool so objectives can be written in alignment with JMU and division/unit strategic plans.

December

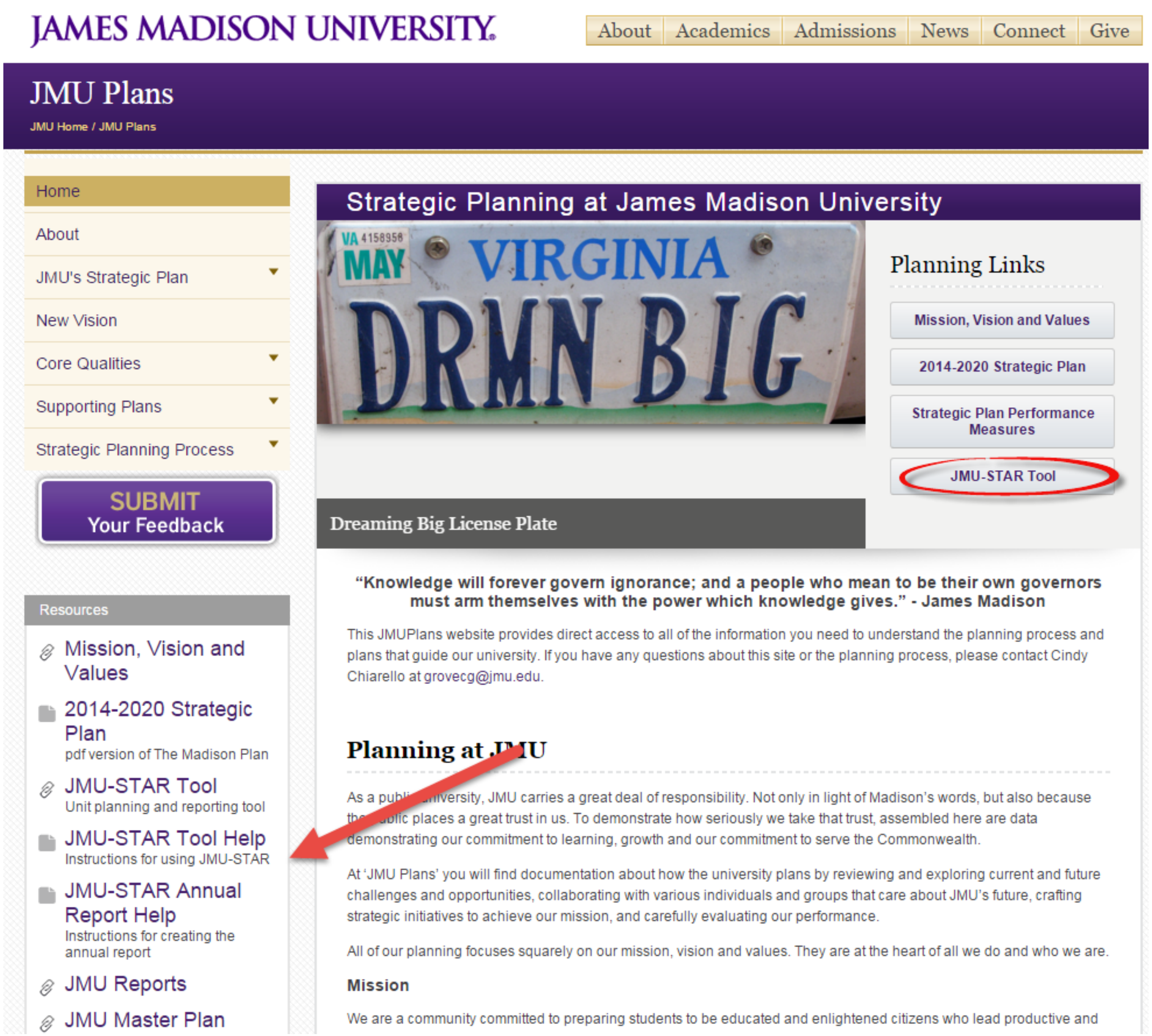
- Directors/AUHs hold departmental discussions concerning objectives to be written into the planning tool for the following FY.
- OIR makes initial contact with instructions concerning writing objectives into the planning tool for the following FY.

Accessing the JMU-STAR Tool

This section describes where to find the tool and how to log in.

Log in

From http://www.jmu.edu/jmuplans, click on the link for the **JMU-STAR Tool**.

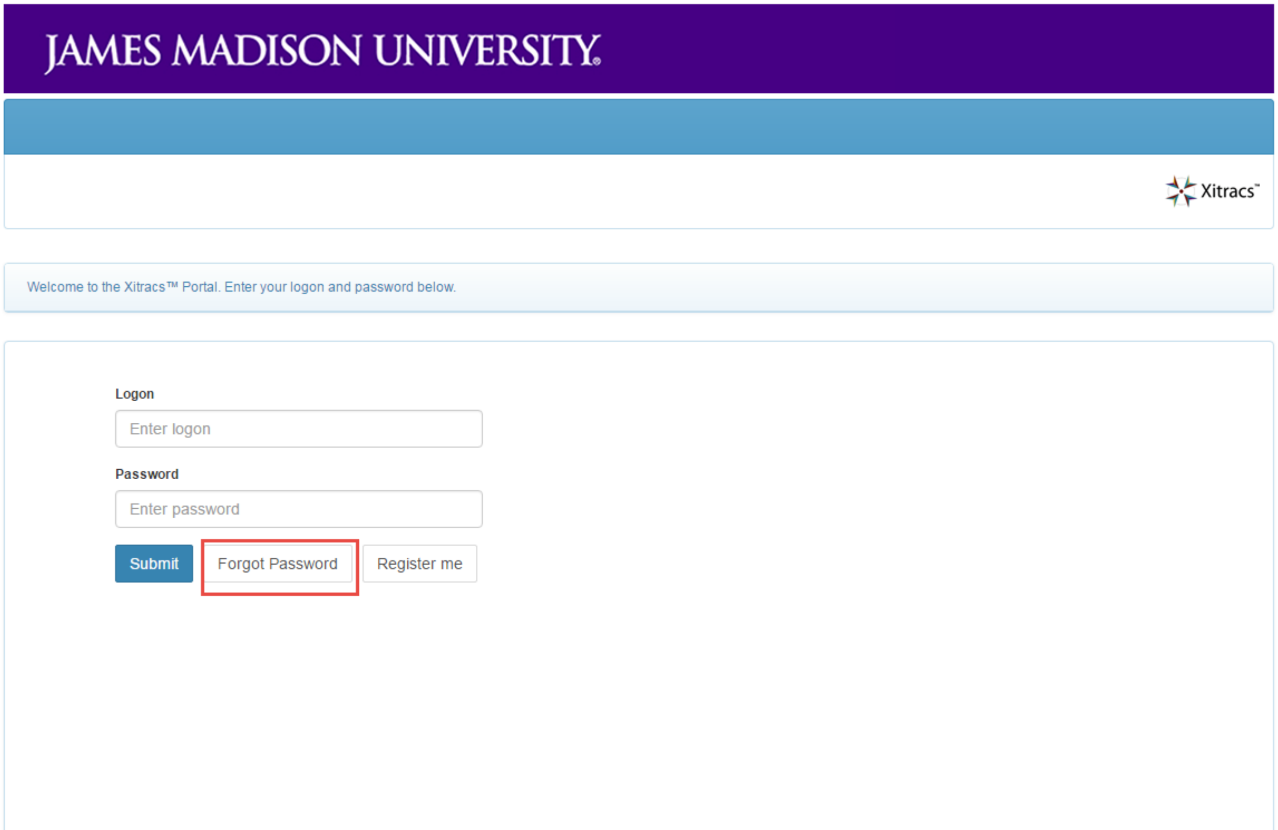


Or, you can bookmark the log in page to the JMU-STAR Portal: https://jmu.xitracs.net/survey/portallogon.jsp

JMU-STAR Username and Password

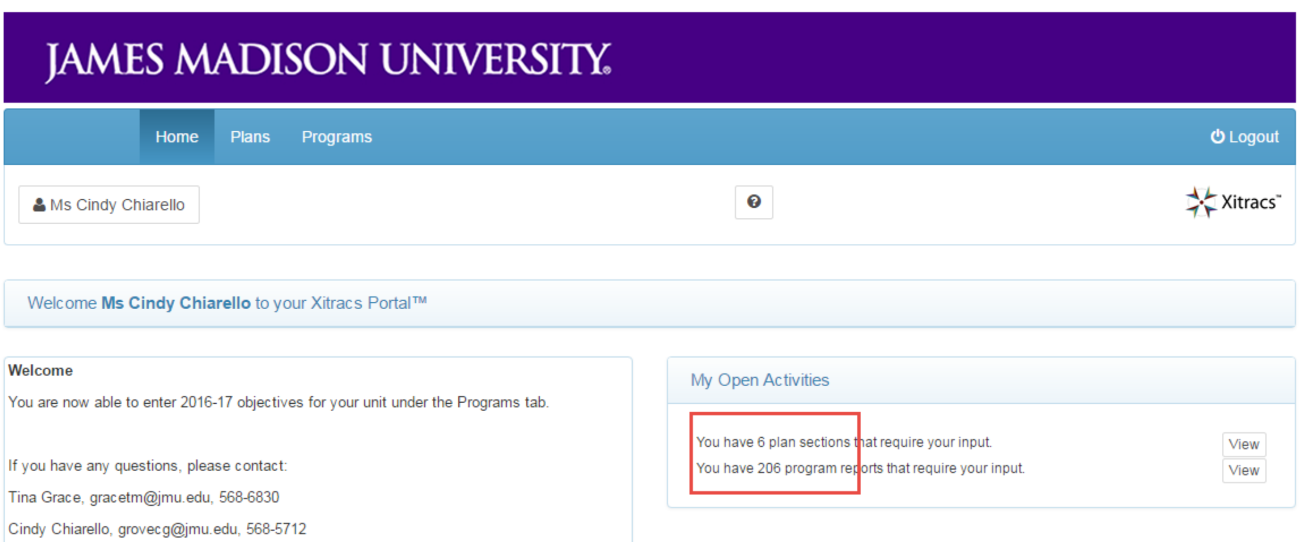
Your JMU-STAR username is set when you request access to use the JMU-STAR tool. Your username is based on your full JMU email. For example, user@jmu.edu.

NOTE: Your JMU-STAR password is not synced with your JMU eID and password; it will not change unless you change it manually. Your default password for training was your JMU e-ID (e.g. gracetm), but you should have *changed this after training was over. If you have forgotten your password or you want to change your password, click **Forgot Password** on the log in page to change your password or create a new one.*

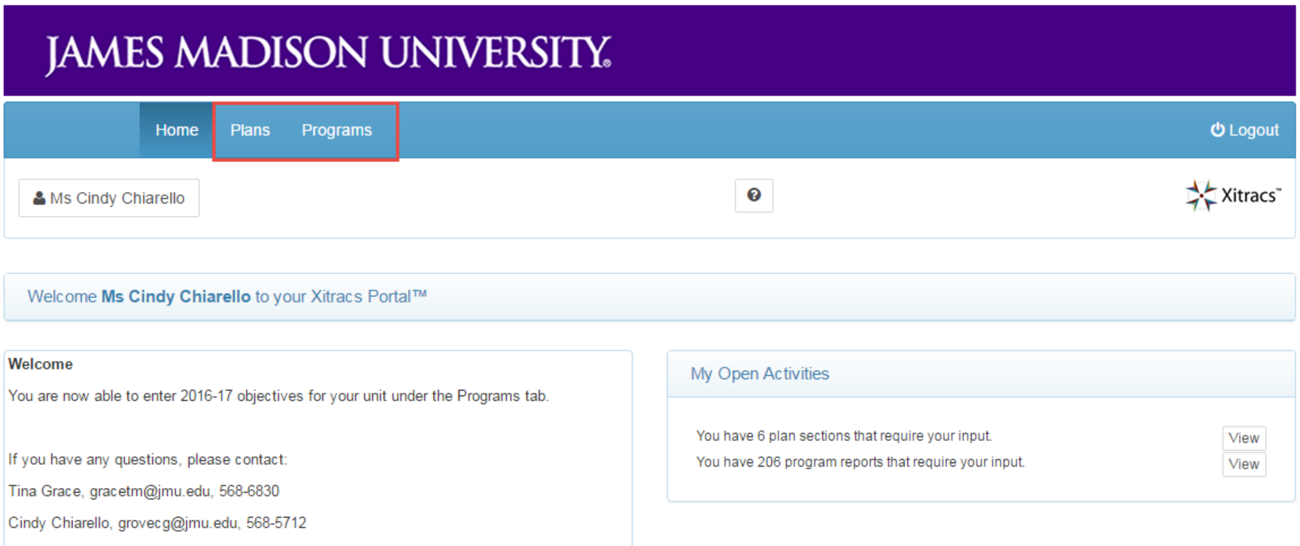


Welcome Page

The welcome page shows the number of programs and plans for which you have access.



This is also where you will choose what part of the tool you need to access. When entering, modifying, or assessing objectives, you will click on **Programs**. When you need to prepare information to submit for a plan (Annual Report, President's Annual Accomplishments Report, etc.) you will click on **Plans**.



Help

If you have questions or need help with any processes in the JMU-STAR Tool or clarification on the planning cycle, please contact:

Tina Grace, 8-6830, gracetm@jmu.edu

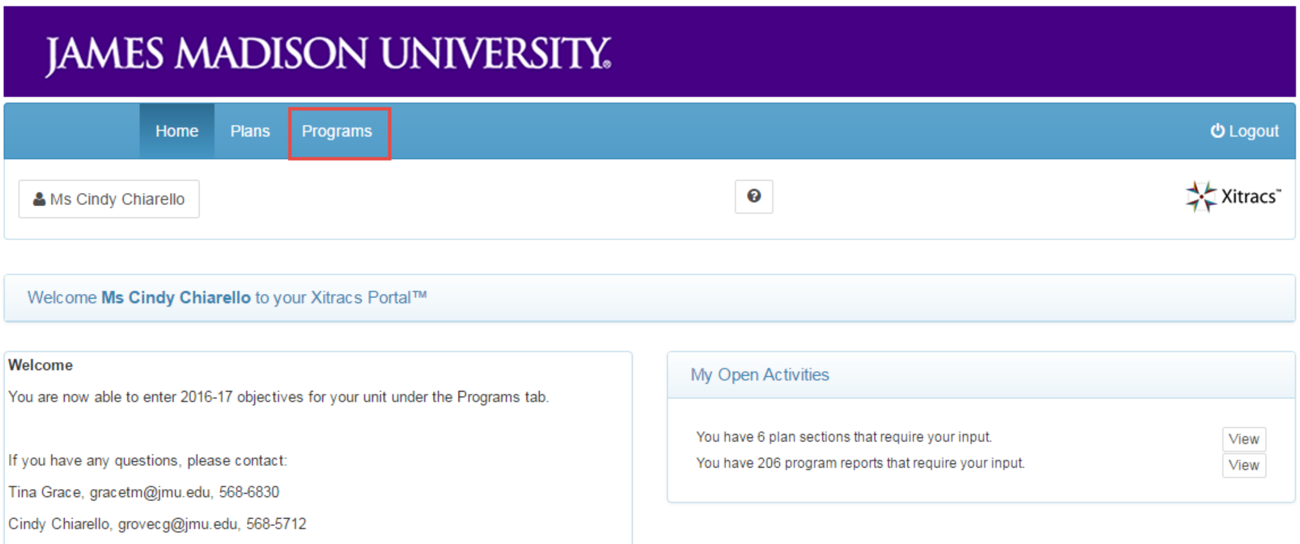
Cindy Chiarello, 8-5712, grovecg@jmu.edu

PART I: Planning Objectives

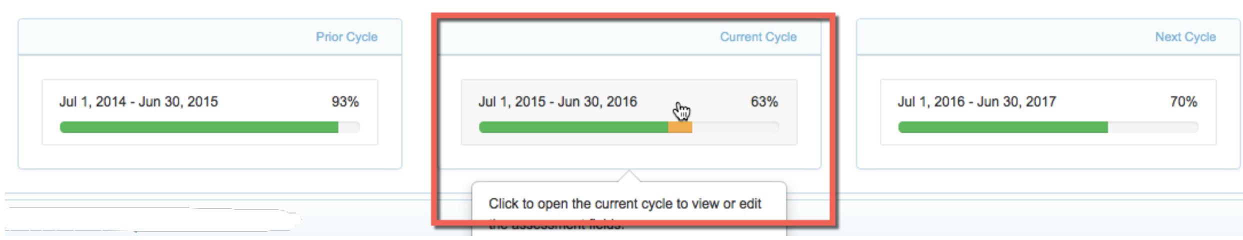
Part I: Planning Objectives contains step-by-step instructions for procedures to enter unit objectives, modify objectives during the planning year, and record results of unit objectives.

Navigating to Programs

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



Choose the planning cycle (year) that you want to work in.

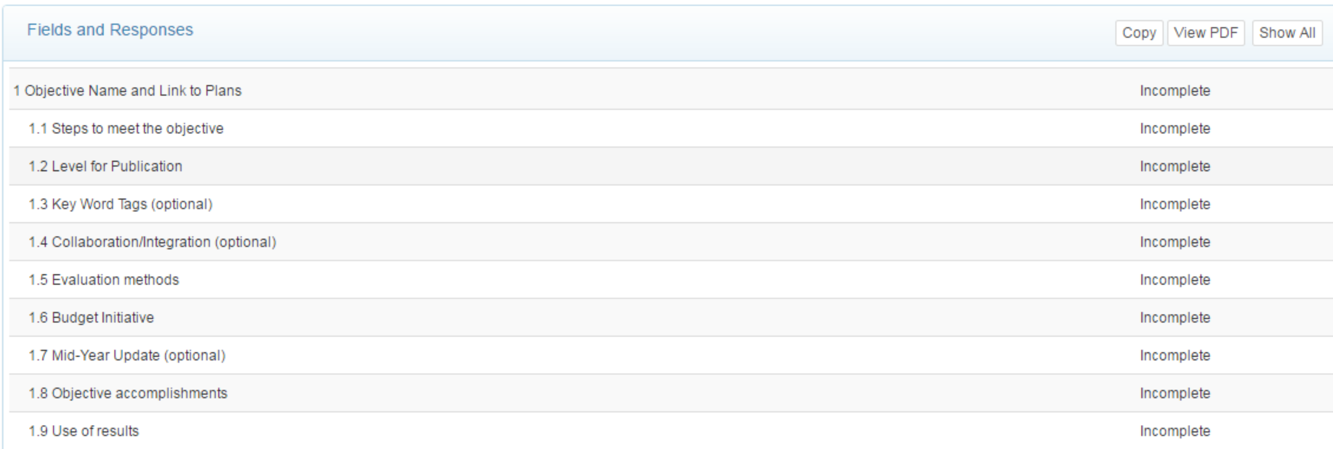


Adding an Objective

Before the beginning of a plan year, you will need to enter your objectives in the JMU-STAR Tool.

Elements of the Objective

The elements (field set) of the objective are:



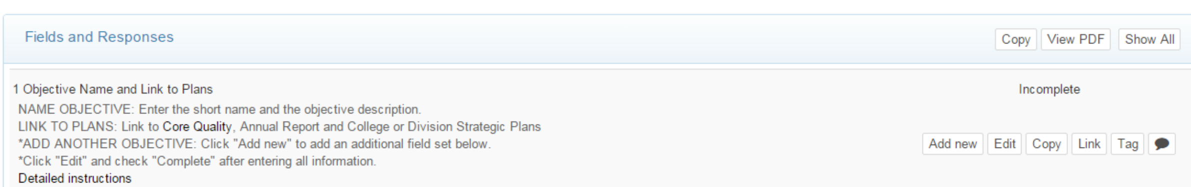
1 Objective Name and Link to Plans

Several things happen in this first box of the objective:

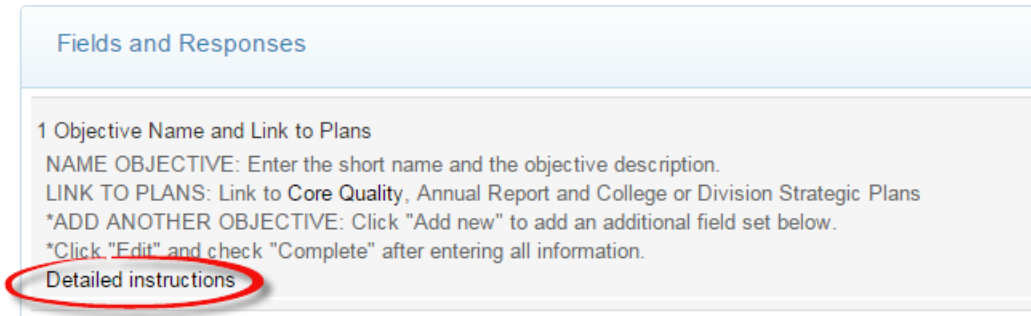
- Objective Name - short and long description
- Link to JMU Strategic Plan (The Madison Plan) and other plans
- Link to Annual Report
- Add a new objective field set

The field set for the first objective is automatically created for each plan year.

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

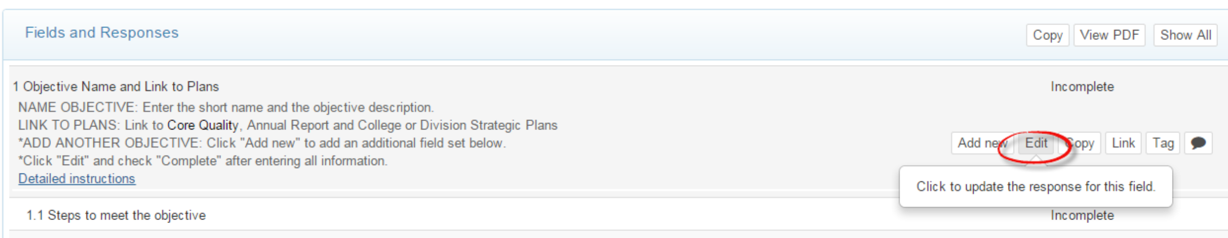


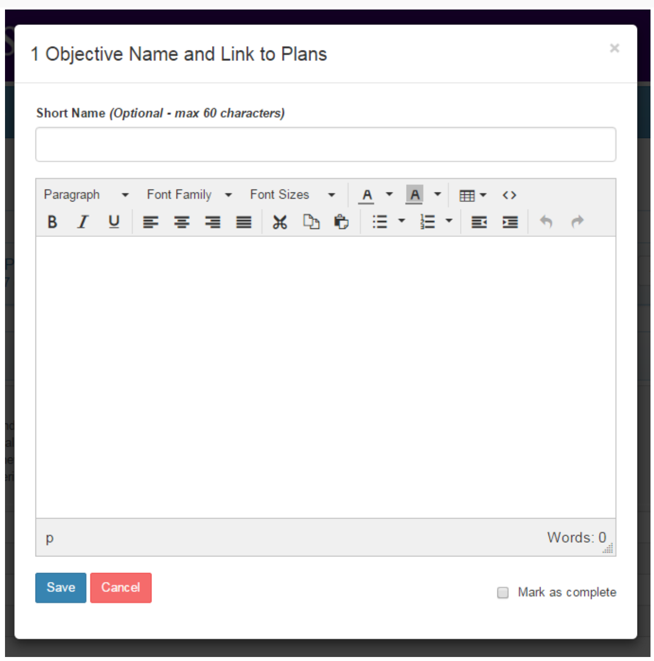
Brief instructions are located in the opened box. Click on the **Detailed Instructions** link for complete information about entering the objective. A PDF will open in a new window.



Name Objective

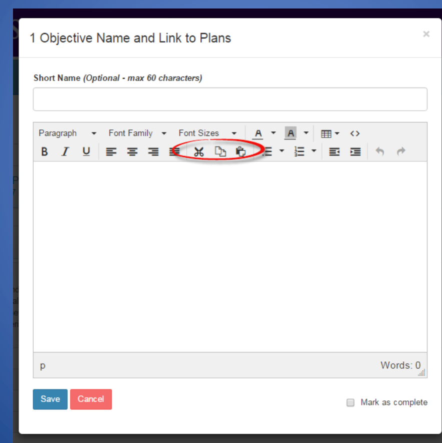
To enter the objective name and description, click on **Edit**. A box will open in the current window.





1. 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. (There is a maximum character count of 60 for this field.)
2. Enter the long description for the objective in the large space. Clearly and concisely describe the objective. Incorporate the following criteria into the objective description: 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.
3. After the information has been entered, click **Save**.

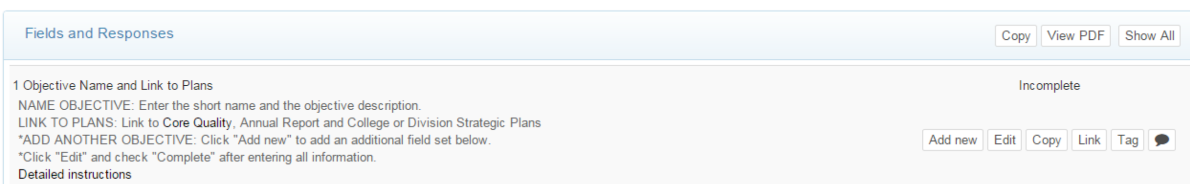
It is recommended that you develop your plan and objectives outside of the JMU-STAR Tool. You can then use copy and paste to quickly enter your objectives.



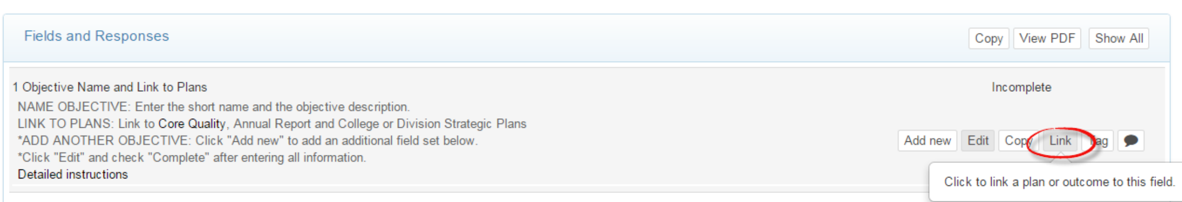
Link Objective to JMU's Strategic Plan

The objective can be linked to several university goals for JMU's Strategic Plan and to other plans.

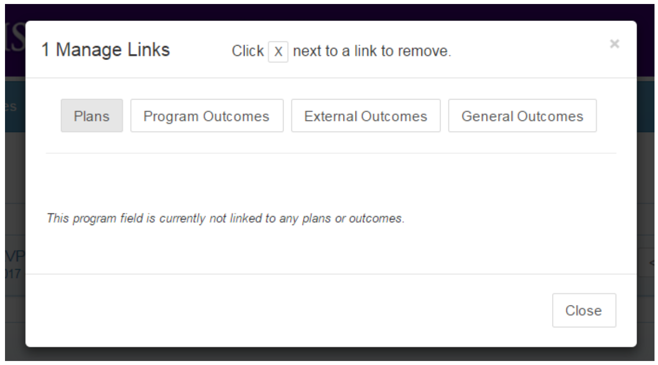
Using the same first objective field:



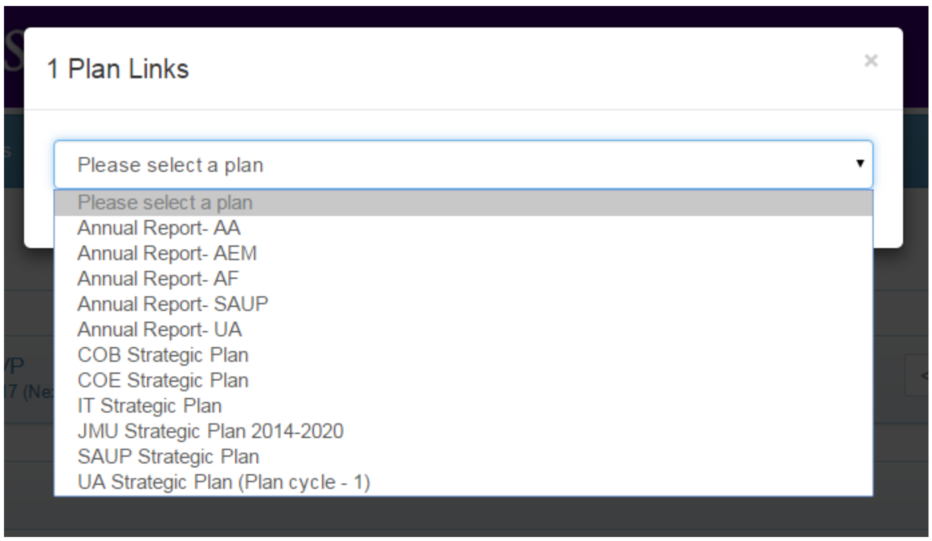
Click on **Link**.



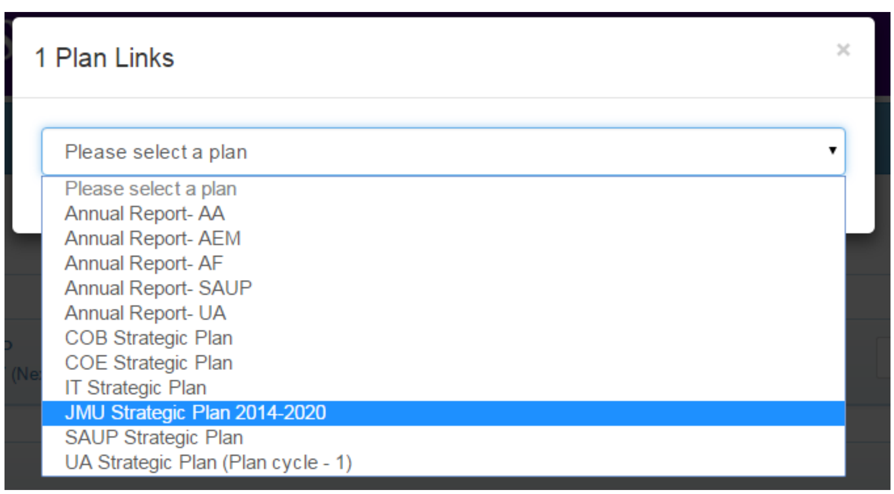
Click on **Plans**.



Click on the drop down in the target plan box.

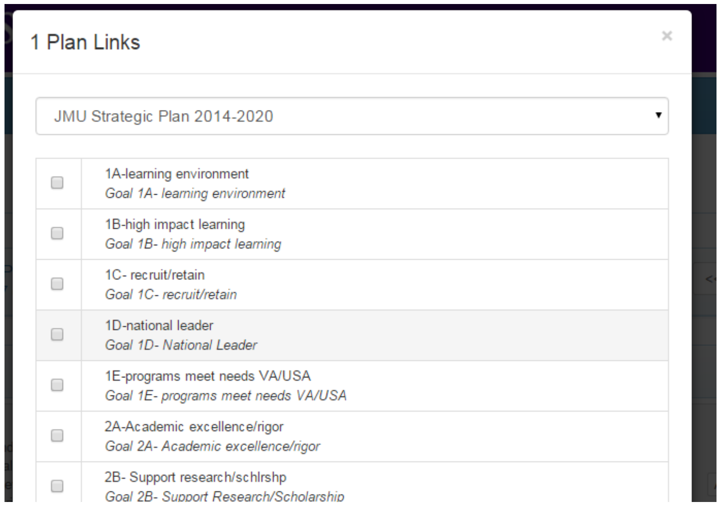


Click on **JMU Strategic Plan 2014-2020** to link the objective to JMU's Strategic Plan.



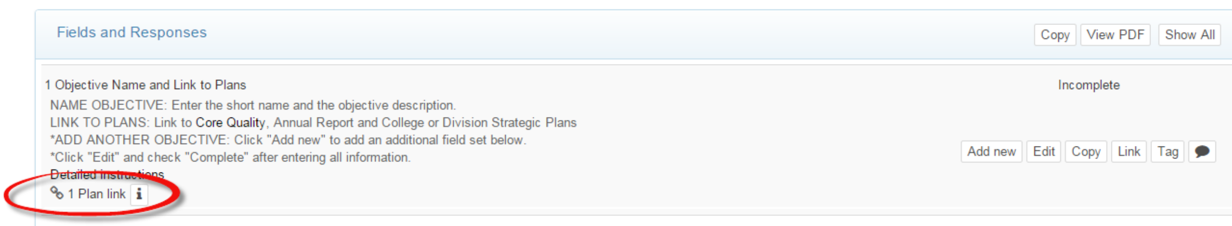
Then choose the university goal(s) that this objective supports (check all that apply). The Core Qualities and University Goals can be viewed at www.jmu.edu/jmuplans. There is an unpublished Core Quality 12:

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.



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

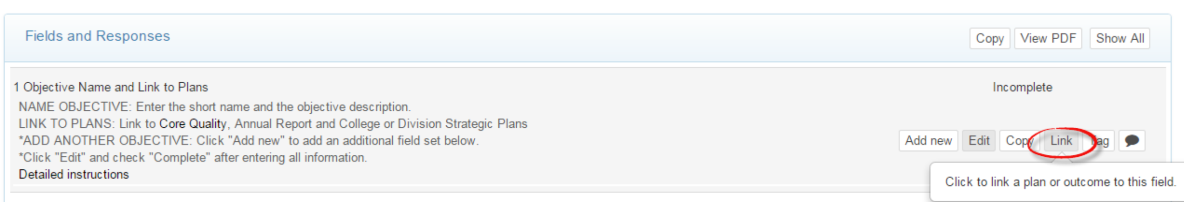
You can easily see the number of plans you are linked to after you have finished linking plans.



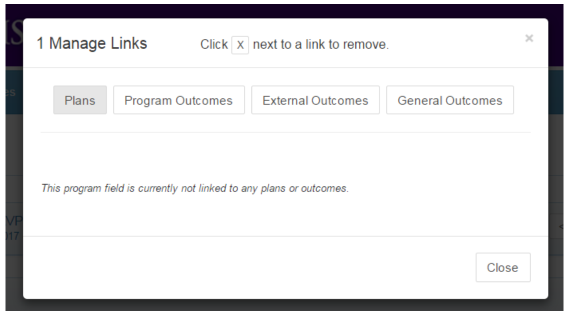
Link Objective to be included in the Annual Report

As with linking to strategic plans, units must link objectives to the Annual Report Plan, otherwise the objective will not be included in the unit's annual reporting.

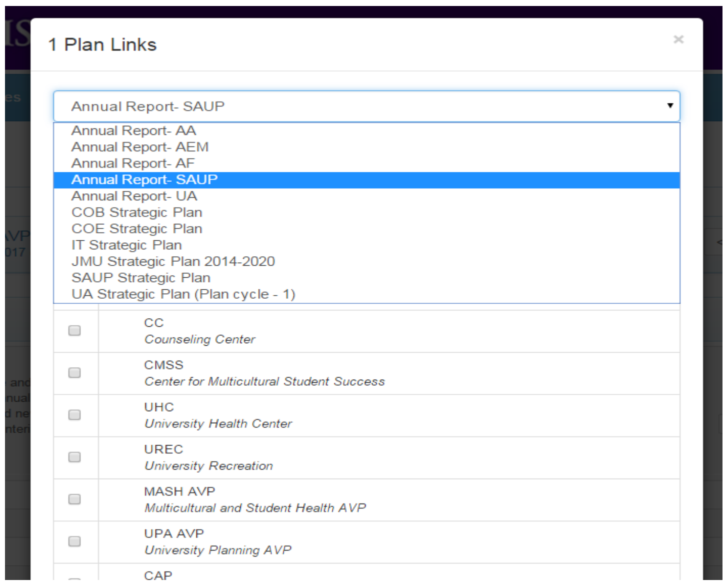
Click on **Link**.



Click on **Plans**.



Click on the drop down box and choose the Annual Report for your division (AA, AEM, AF, SA, UA).



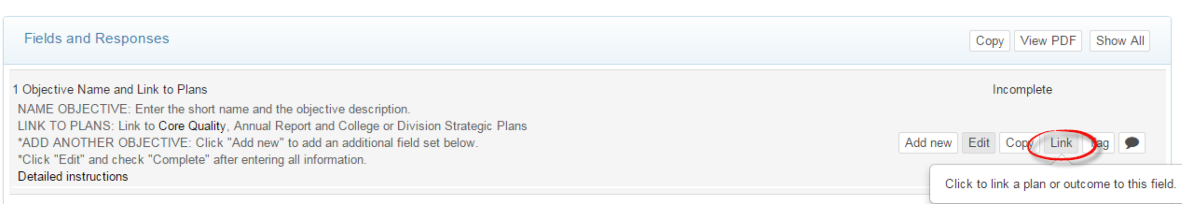
Check the button next to the appropriate unit from the list. The list is organized by AVP/Dean level. Check with your AVP/Dean for instructions about linking to his/her annual report.

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

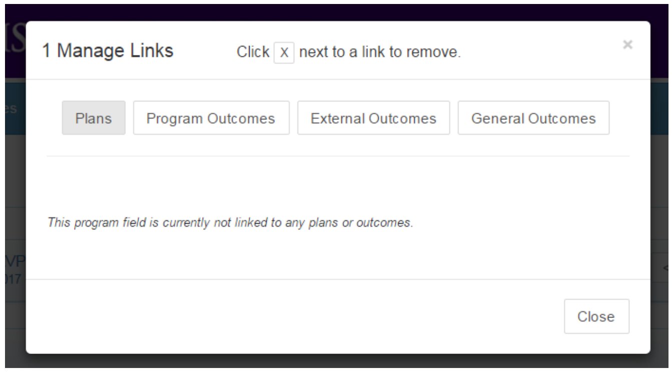
Link Objective to a College, Unit Strategic Plan or Other Plan

If your division/college/AVP area has a strategic plan that you will link to, follow these instructions. Click on the appropriate strategic plan for your area.

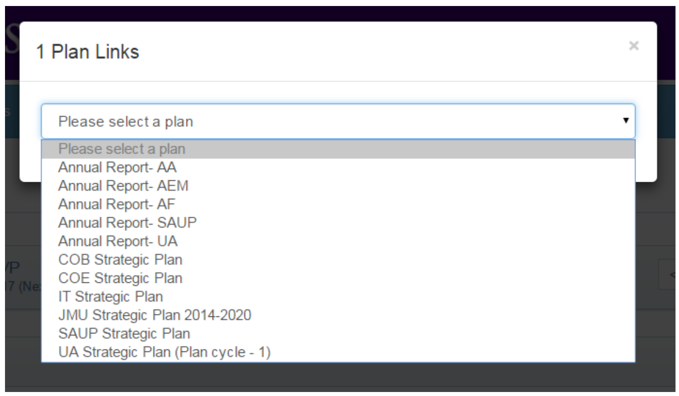
To link to other college or department strategic plans, click **Link**.



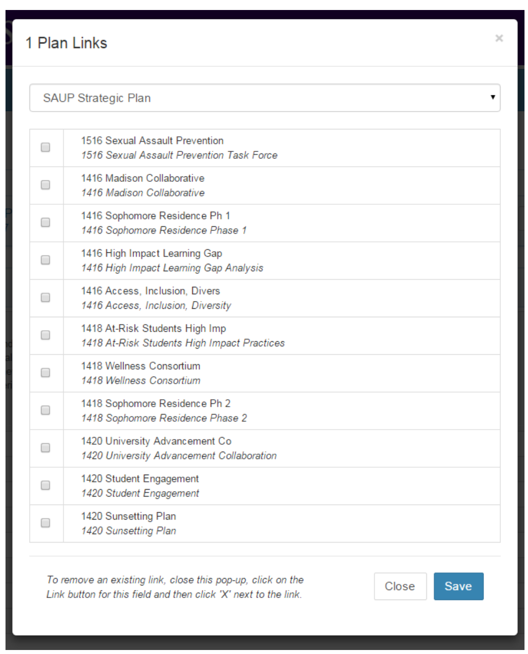
Click on **Plans**.



Click on the drop down box.

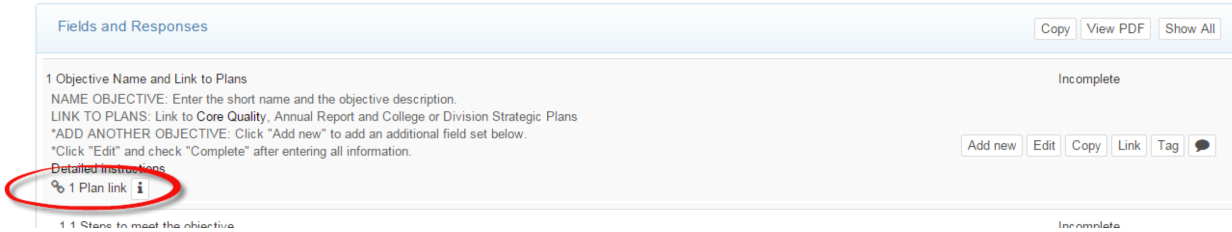


Choose the plan from the list in the drop down and select the applicable goals.



Click **Save.**

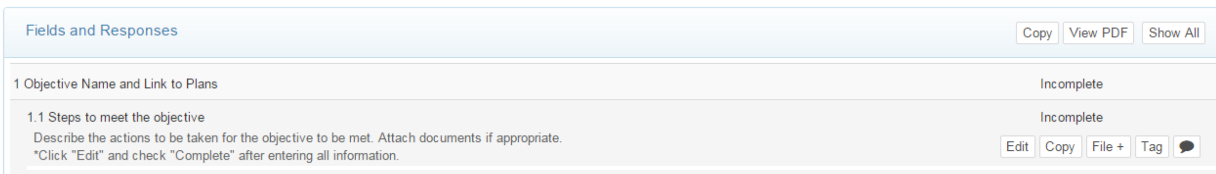
You can easily see the number of plans you are linked to after you have finished linking plans.



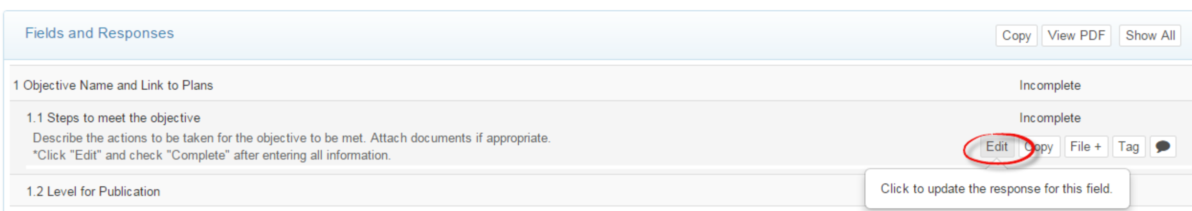
1.1 Steps to meet the objective

Describe the actions to be taken in order for the objective to be met. (You can attach documents if appropriate.)

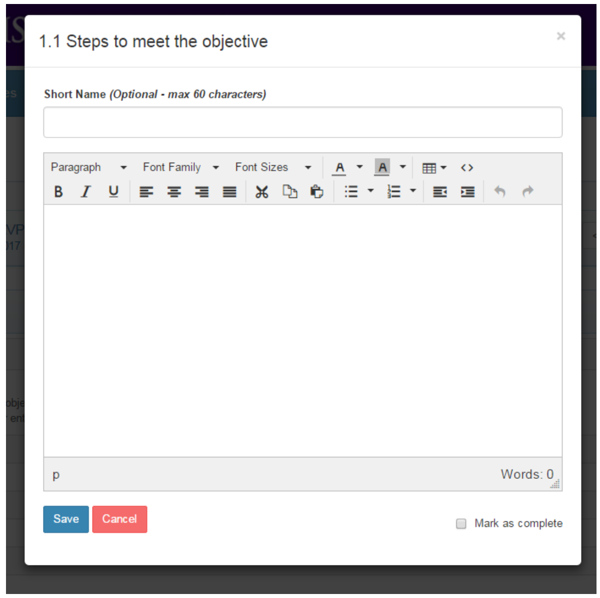
Click on the **Steps to meet the objective** field.



Brief instructions are located in the opened box. Click **Edit**.



In the large space, enter the steps the unit will take to achieve the objective. Fully describe the key steps to reach the objective. Make sure all key steps are fully described with specific enough detail to be measureable and stat a specific timeframe for completion.

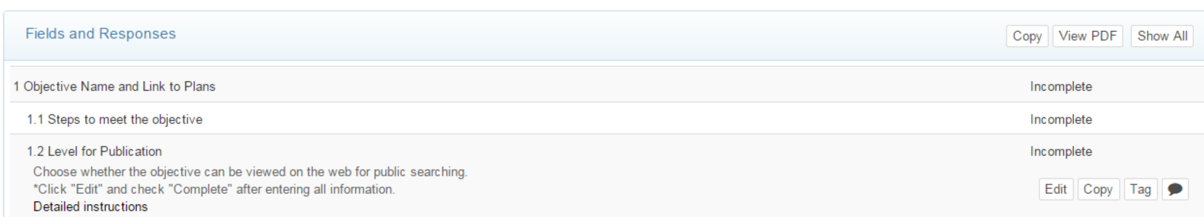


After the information has been entered, click **Save**.

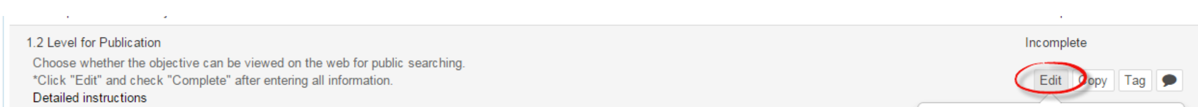
1.2 Level for Publication

This function will be used to indicate the degree of transparency: whether this objective will be viewable on the website.

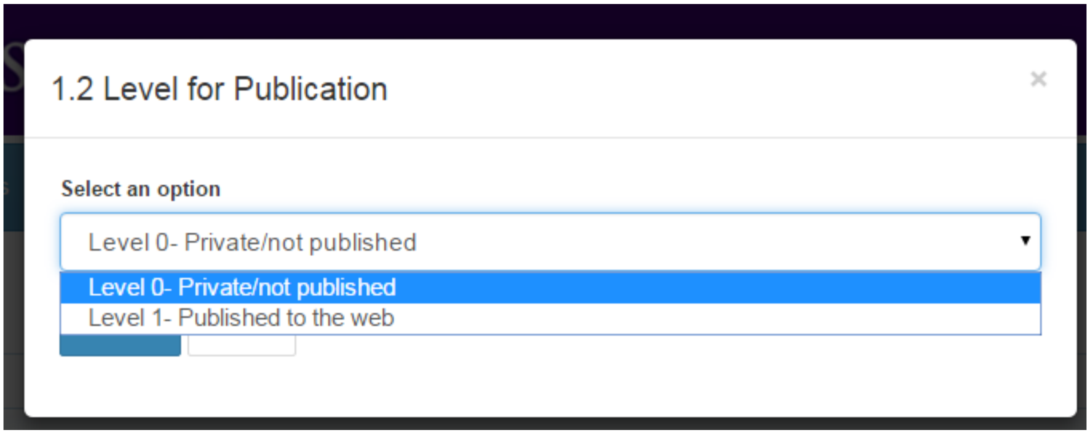
Click on the **Level for Publication** field. The plus sign (+) will also open the field.



Click **Edit**.



Click on the drop down box.



Choose the level of transparency.

> **Level 0-Private/not published** means that the objective will not be published to the web for public searching.
>
> **Level 1-Published to the web** means that the objective can be published to the web for public searching by anyone with an @jmu.edu email address.

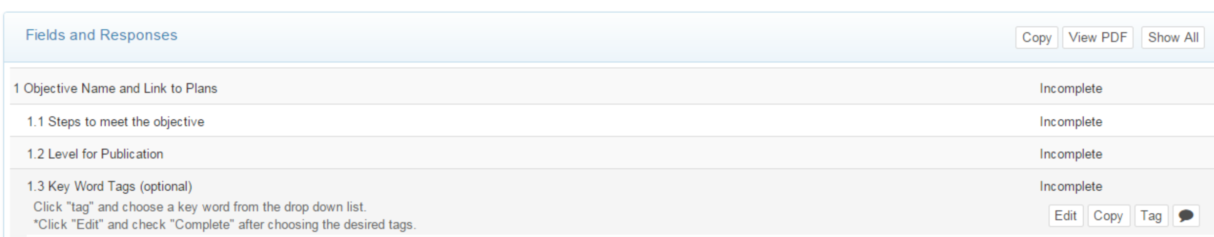
After the information has been entered, click the **Mark as complete** box.

To save this information, click **Submit** in the bottom left.

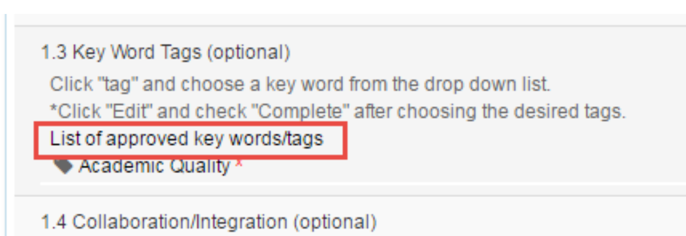
1.3 Key Word Tags (optional)

There are over 100 key words identified. Use only the approved key words.

This Field is optional. Click on the **Key Word Tags (optional)** field.



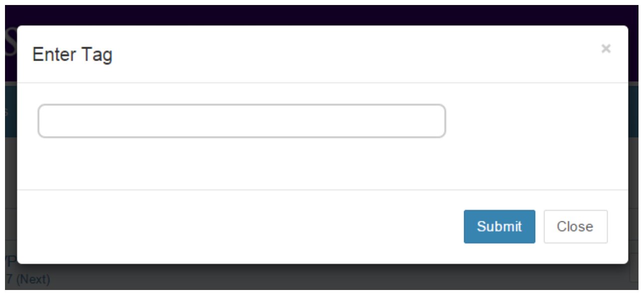
Click on List of approved key words/tags.



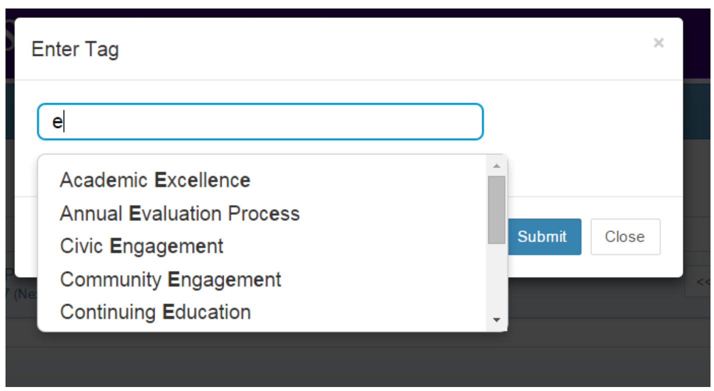
A new window will open with a pdf of the approved key words/tags. Search the list for a key word that relates to your objective. Close (or save this document while you are working) and navigate back to your objective field 1.3.

Click **Tag**.

In the box, begin typing the key word/tag that applies to this objective.



As you begin typing, key words/tags will appear below the text box. Choose the appropriate word.



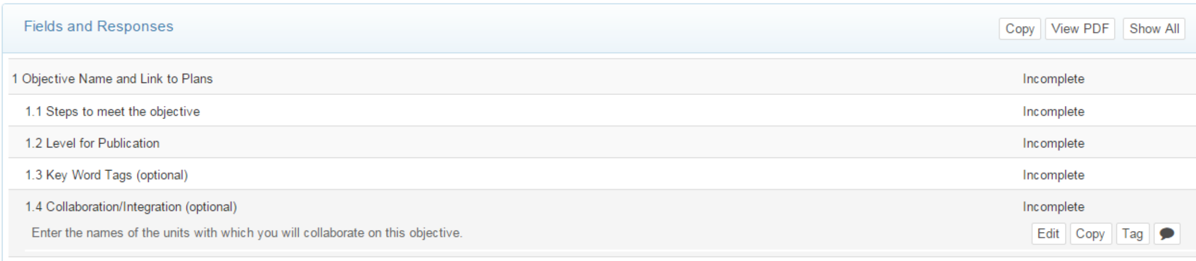
To save this information, click **Submit** in the bottom right.

This objective can be tagged to other key words.

Click **Tag** again to choose another word.

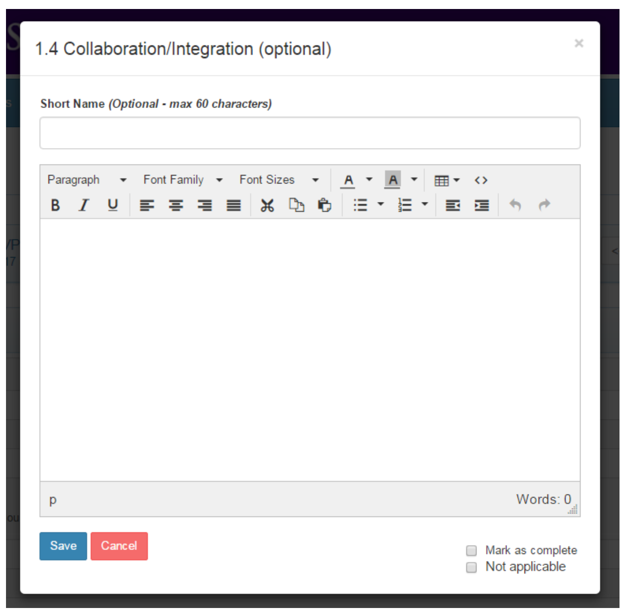
1.4 Collaboration/Integration (optional)

This Field is optional. Click on the **Collaboration/Integration (optional)** field.



Brief instructions are located in the opened box. Click **Edit**.

In the large text area, enter the unit names with which you will collaborate on this objective.

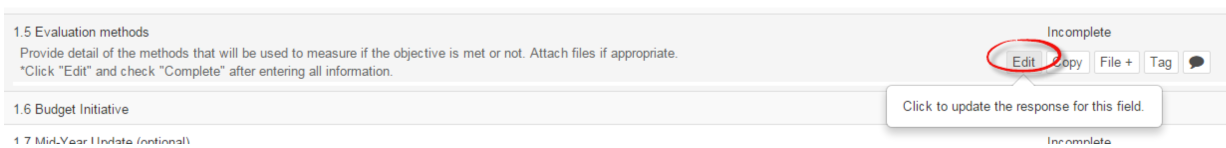


After the information has been entered, click **Save**.

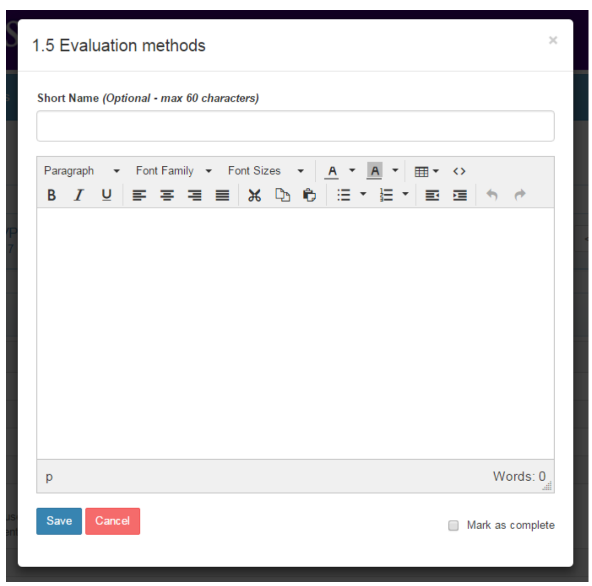
1.5 Evaluation Methods

Click on the **Evaluation Methods** field.

Brief instructions are located in the opened box. Click **Edit**.



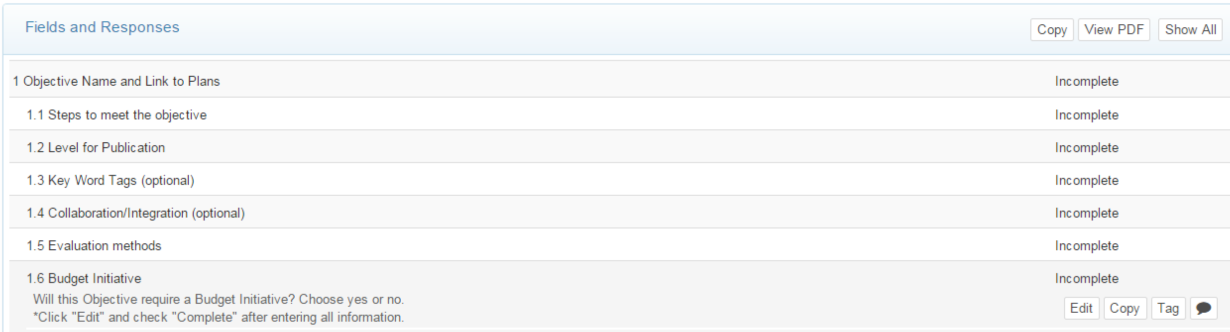
In the large text area, enter the methods you will use to evaluate the success of this objective. Describe the specific, systematic evaluation methods that will be used to measure change. Include how the objective will be evaluated/assessed using specific, systematic evaluation method(s) that are clearly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



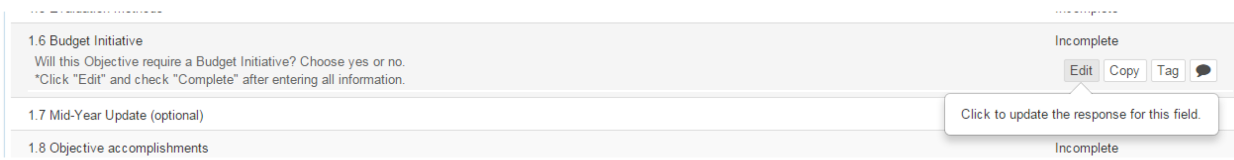
After the information has been entered, click **Save**.

1.6 Budget Initiative

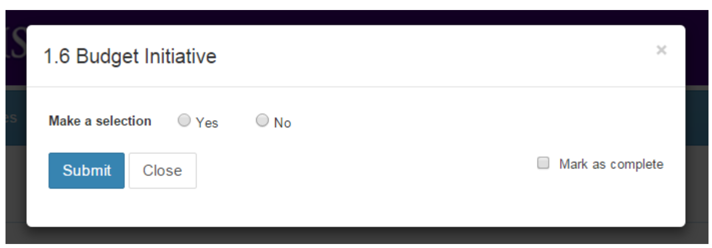
Click on the **Budget Initiative** field.



Brief instructions are located in the opened box. Click **Edit**.



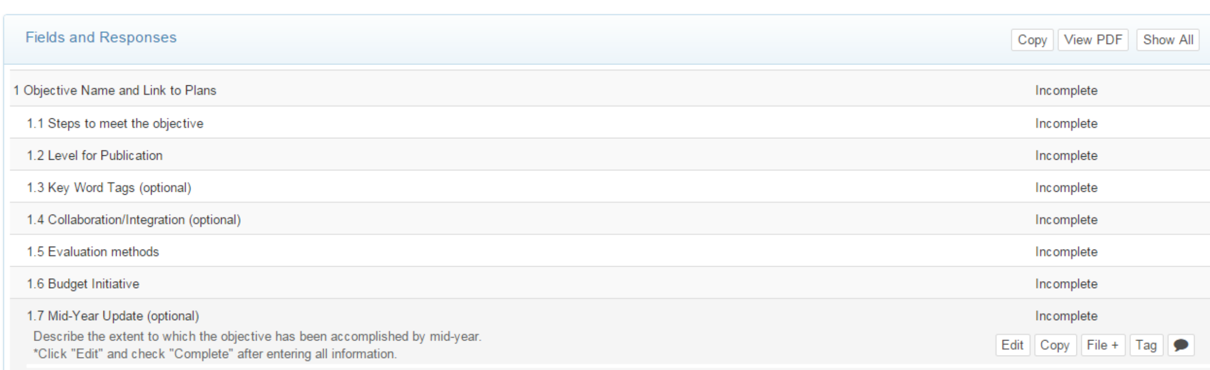
Select **Yes** or **No** if you are submitting a budget initiative for this objective. You can also check the box here to mark this as complete.



After the information has been entered, click **Save**.

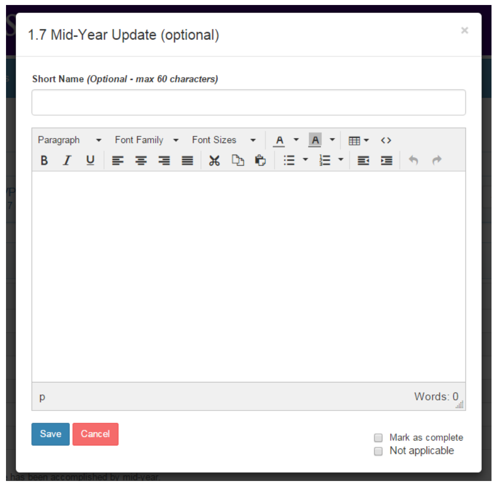
1.7 Mid-Year Update (optional)

This field is optional. Click on the **Mid-Year Update (optional)** field.



Brief instructions are located in the opened box. Click **Edit**.

The mid-year update fully describes the extent to which each of the specific activities outlined in Section 5 – **Steps to Reach the Objective** have been achieved and the changes that occurred. Describe the extent to which the objective has been accomplished by mid-year.

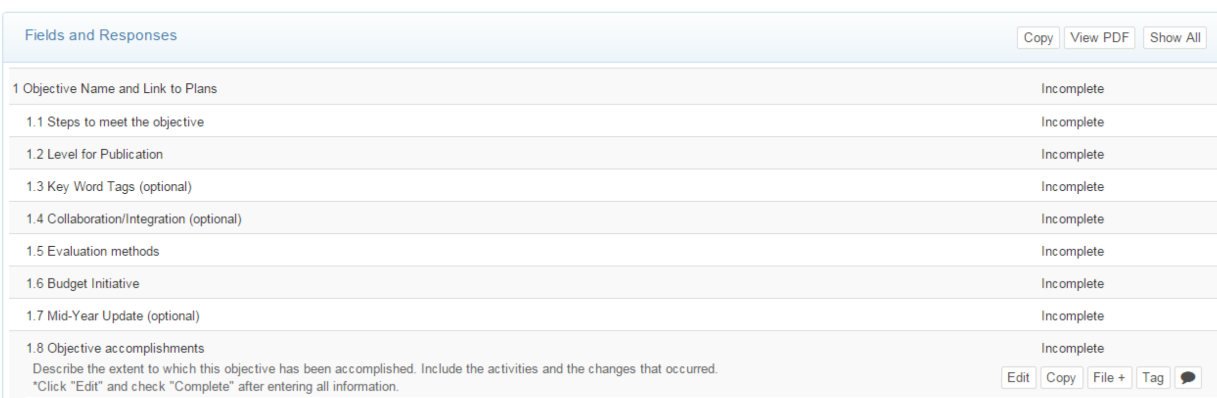


After the information has been entered, click **Save**.

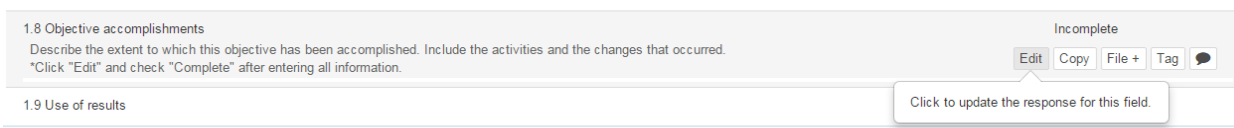
If your unit is not required to complete the Mid-year Update, click **Not applicable** or you can mark this as complete.

1.8 Objective Accomplishments

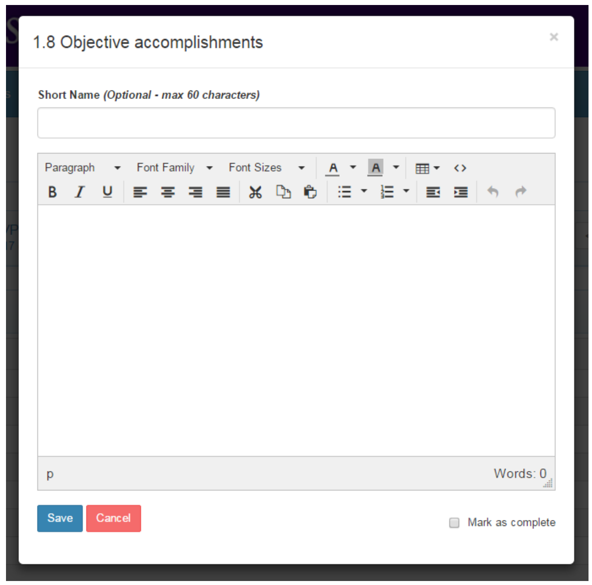
Click on the **Objective Accomplishments** field.



Brief instructions are located in the opened box. Click **Edit**.



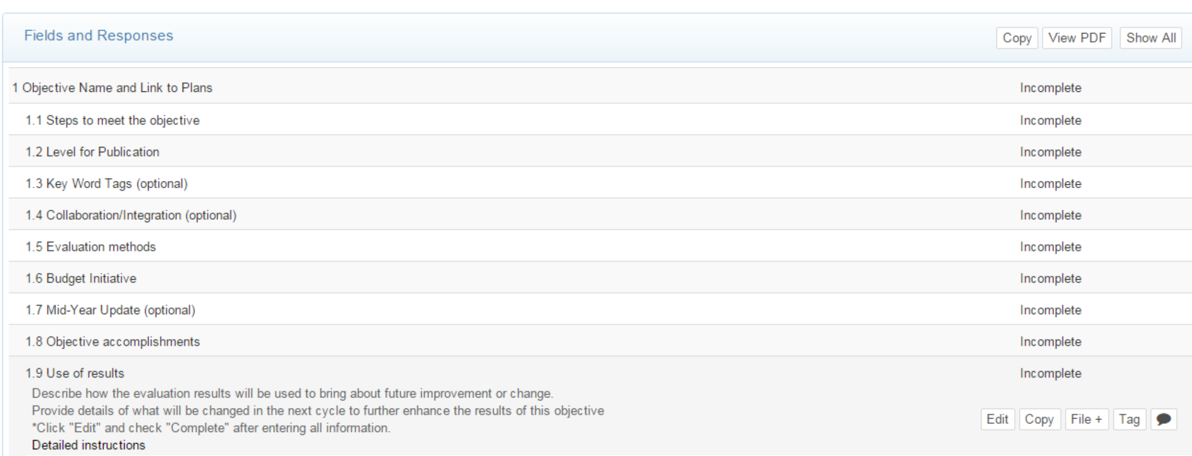
In the large text area, describe the extent to which this objective has been accomplished. The description should fully describe the extent to which each of the specific activities outlined in Section 5 – **Steps to Reach the Objective** have been achieved and the changes that occurred.



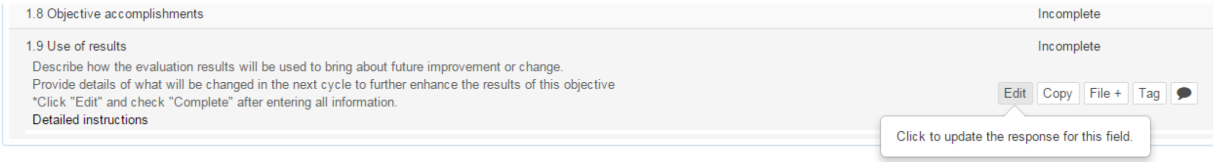
After the information has been entered, click **Save**.

1.9 Use of Results

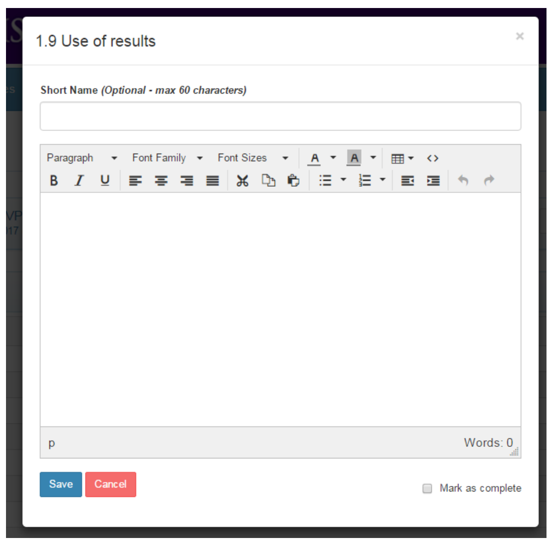
Click on the **Use of Results** field.



Brief instructions are located in the opened box. 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:
The (unit, office, department, program)
will (enhance, enrich, further, advance)
the (time, cost, quality, quantity)
of (function, program, activity).



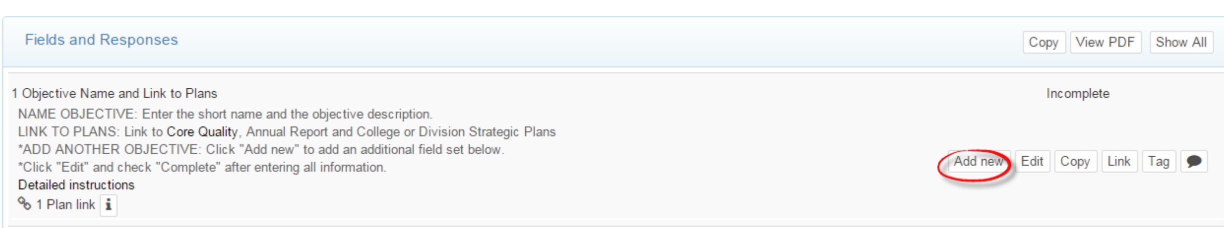
After the information has been entered, click **Save**.

Adding Additional Objectives

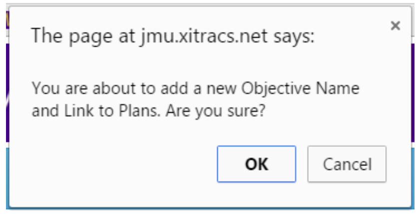
To add additional objective field sets in the same plan year,

Click on the first objective field.

Click **Add New**.



In the alert message, click **OK**. This verifies that you want to add the next field set.



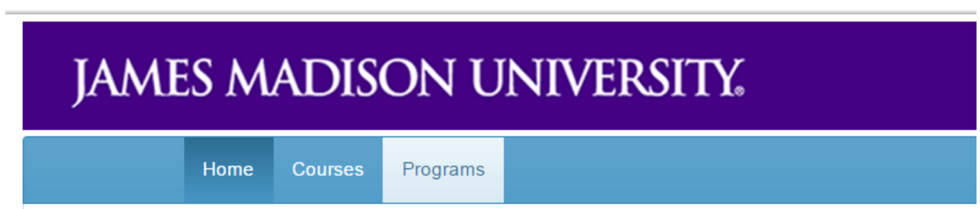
A new field set will be available below the existing field set(s).

Scroll down to see the new field set and enter the information for the next objective using the steps in this manual under the section **Adding an Objective**.

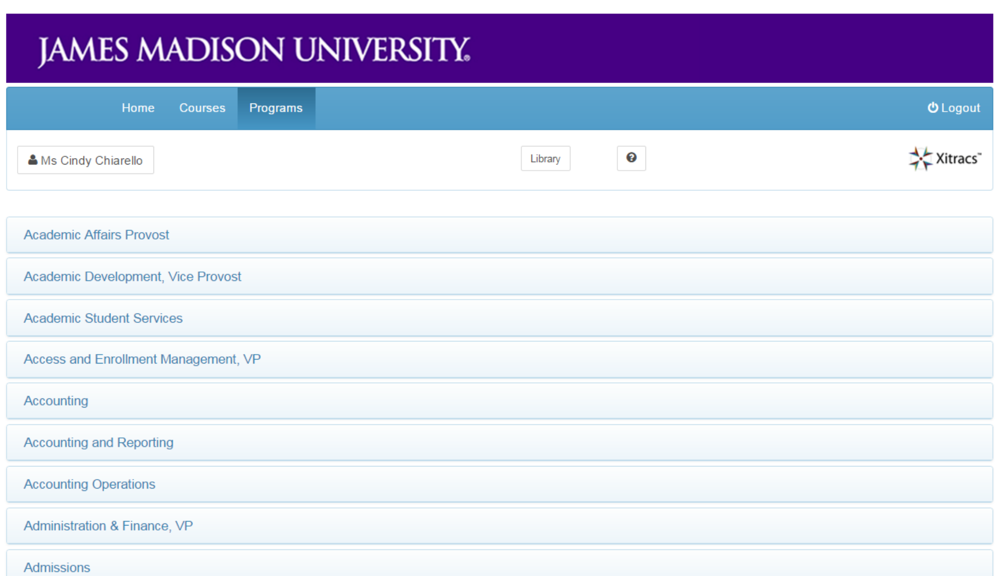
Editing/Reviewing Objectives

Because planning is a fluid process, during the year you will want to review your objectives and possibly modify them. You will also want to record accomplishments related to the objective and assess programs related to the objective as events occur during the plan year.

Choose the Programs tab in the JMU-STAR Portal

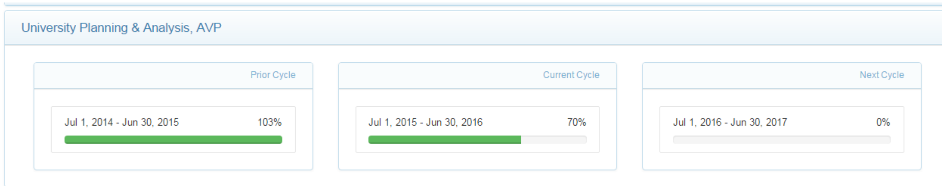


The Programs page lists the units whose objectives you can edit or review.



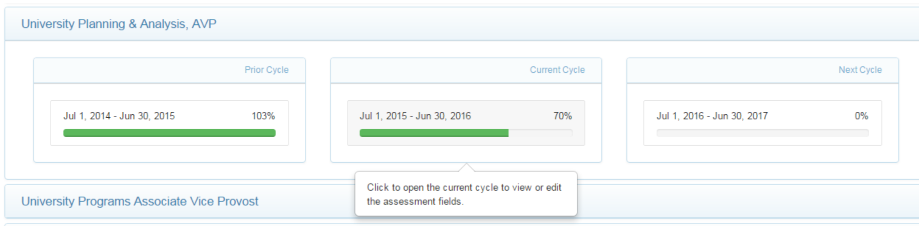
Select the program you want to work on by clicking on it.

There are three cycles visible: **Prior Cycle**, **Current Cycle**, and **Next Cycle**.

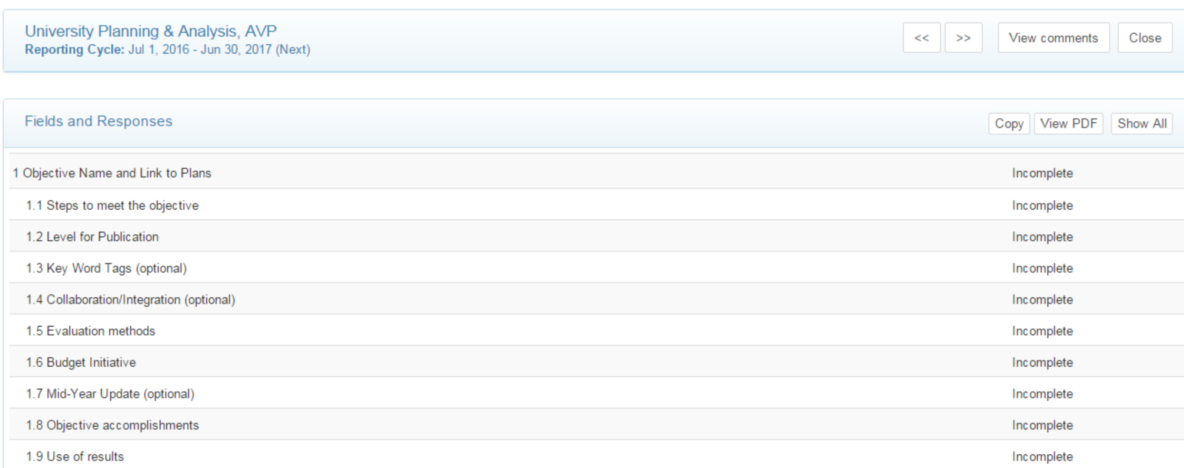


To edit or review the objectives for a unit:

a. Identify the unit from the list of programs you have access to.
b. Click on the progress bar under the desired cycle.



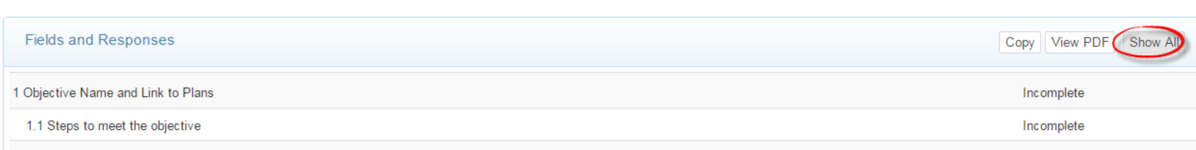
The elements (field set) of the objective are:



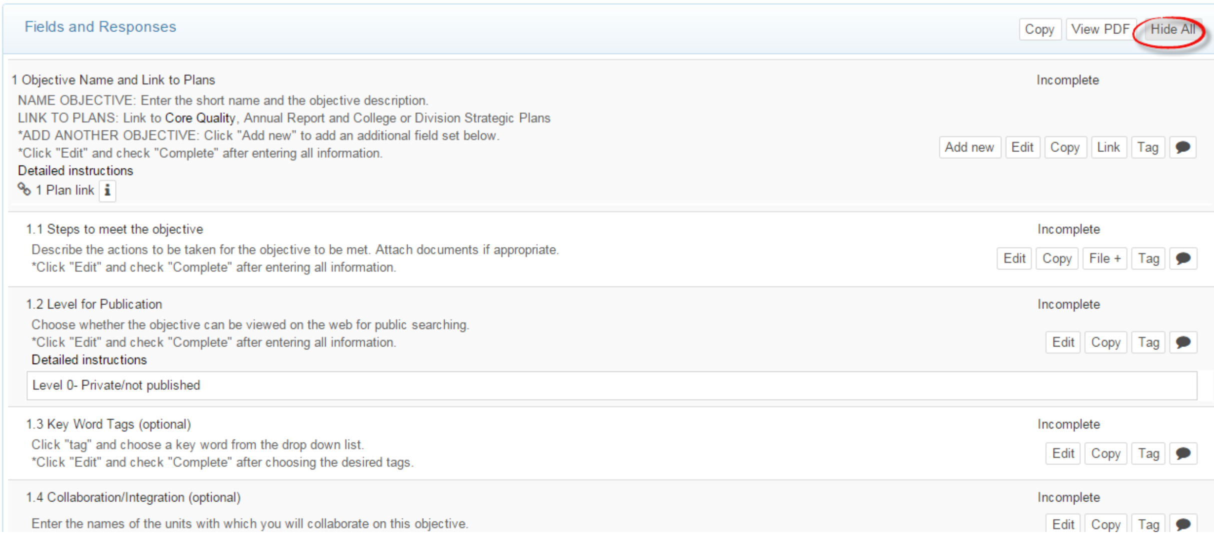
*NOTE: The **Incomplete** indicator denotes that the information has not been entered. Once information has been entered and is ready for review, change the status to **Complete**. This indicator only applies to entering information, not whether the objective element has been met.*

Printing/Viewing Objectives

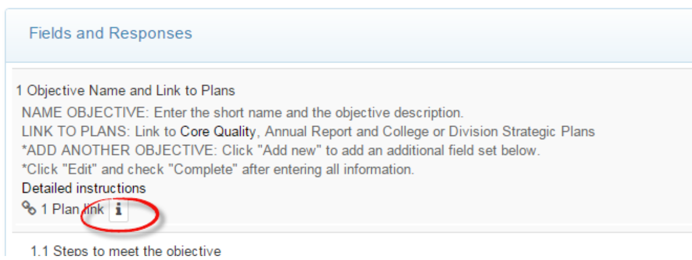
Click on **Show All** to open all of the fields for the objectives.



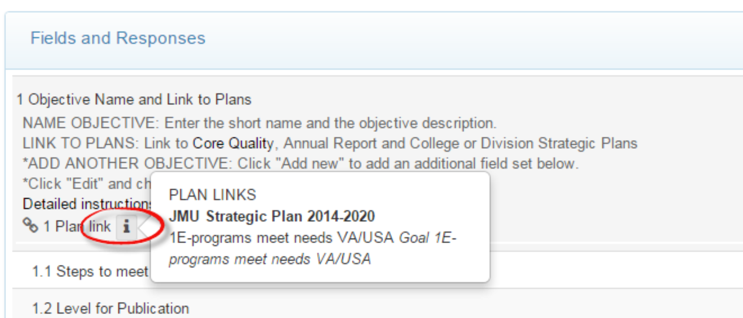
Likewise, you can close all of the open fields by clicking **Hide All**.



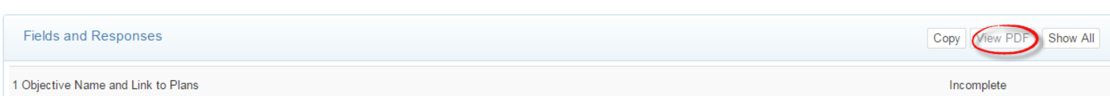
For a specific objective, hover over the Information icon (denoted by a lower case **i**.)



The information box will appear identifying the plans to which the objective is linked.

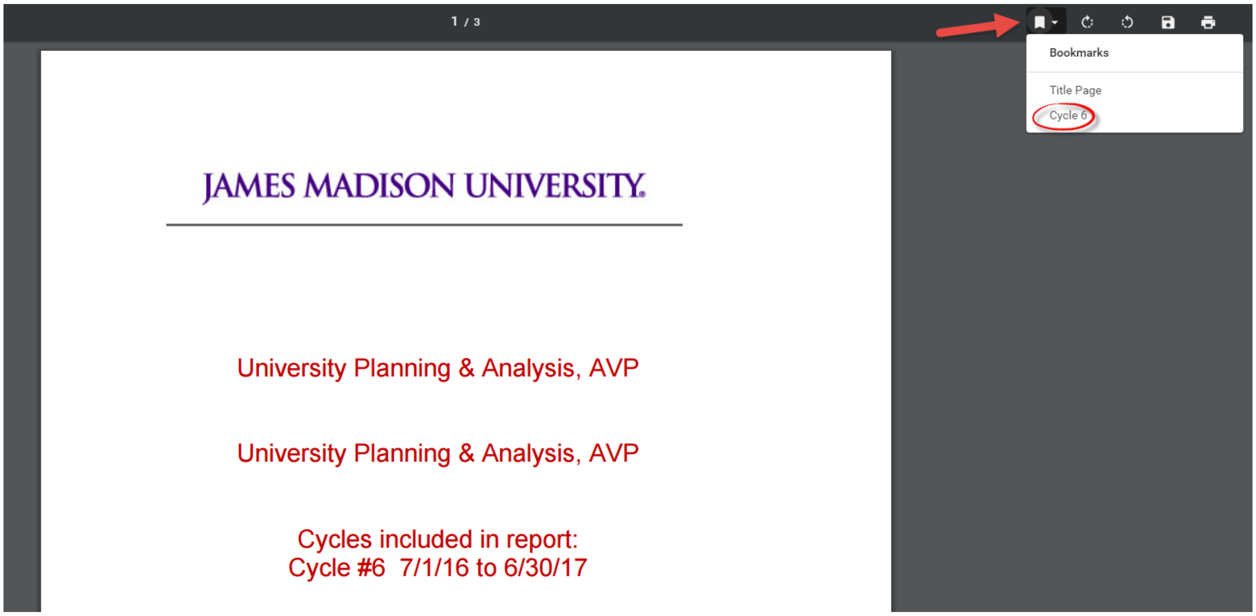


Click on **View PDF**.



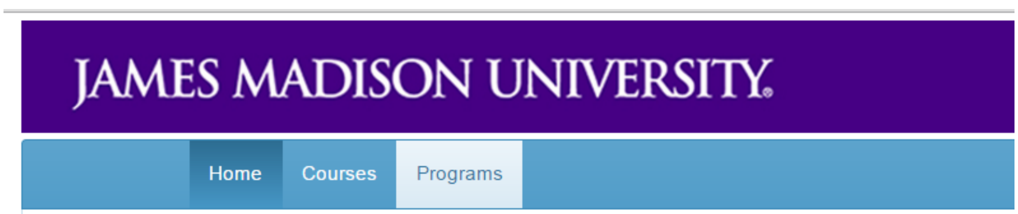
The created PDF will open.

Click on the bookmark for the **Current Cycle** (here for example, Cycle 6) or scroll down to see the details of the report.



Creating Objectives for the Next Cycle

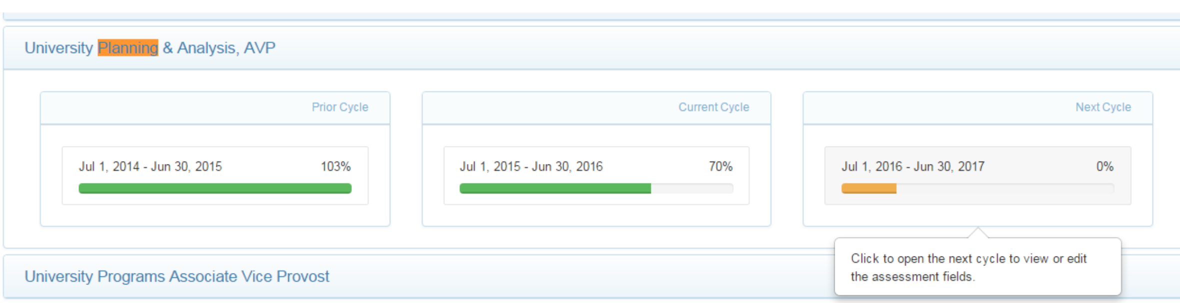
Choose the **Programs** tab in the JMU-STAR Portal.



Choose the **Next Cycle.**

Identify the unit from this list.

Click on the progress bar under the next cycle.

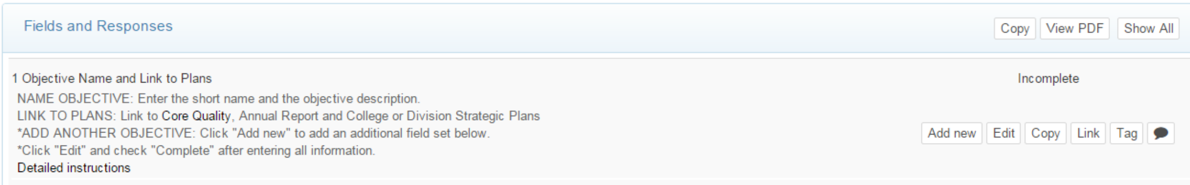


The field set for the first objective is automatically created for each plan year. You can begin adding new objectives (refer to the **Adding an Objective** section in this manual) or you can copy objectives from the **Current Cycle**.

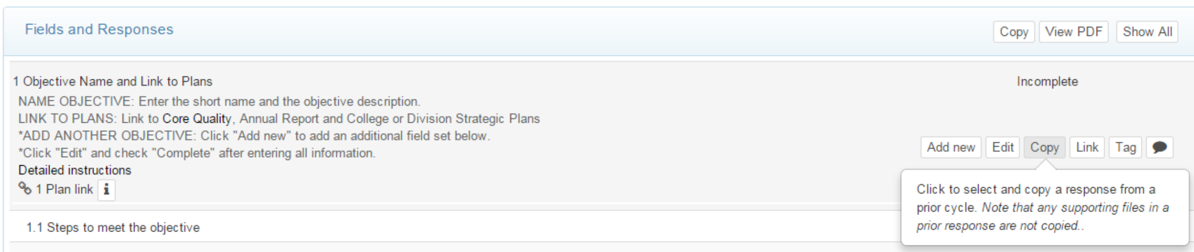
Copy Objectives

The objective field set for the first objective is on the page.

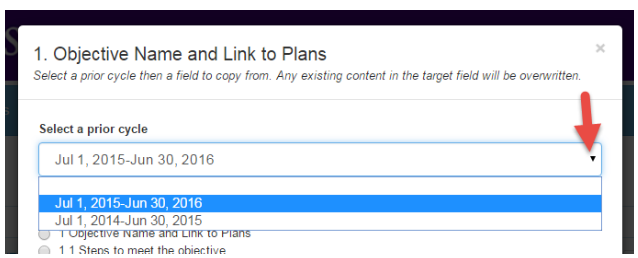
Click on the first objective field to open it.



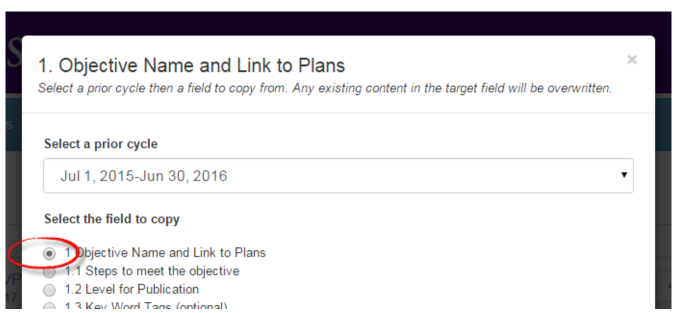
Click **Copy** to open the window that will allow you to copy information from the previous year for this objective element (in this example, **Objective Name and Link to Plans**).



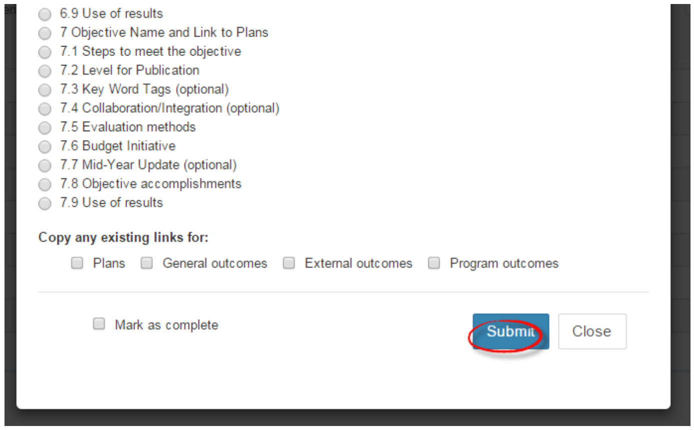
Choose a cycle from the drop down box.



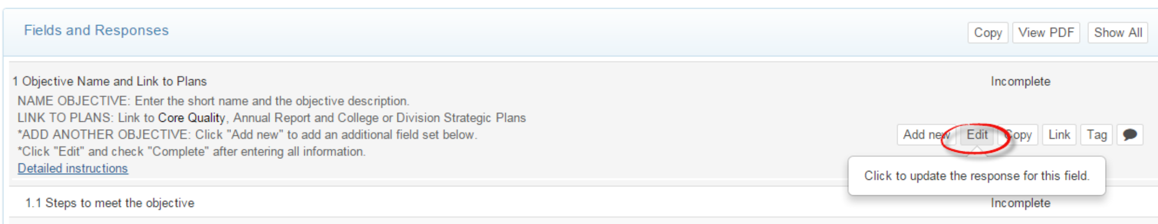
Click on the objective element to copy—in this instance, the **Objective Name and Link to Plans**.



Scroll to the bottom of the list. Notice you can elect to copy existing links from the previous cycle's objective. Once you have made your selections, click **Submit**.

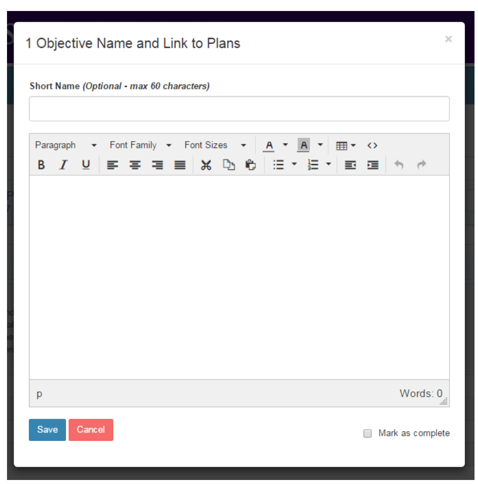


To update the objective name and description click **Edit**.



Modify the **Short Name** for the objective in the box at the top (just a few words; there is a maximum character count of 60).

Modify the long description for the objective in the large space.



After the information has been entered click **Save**.

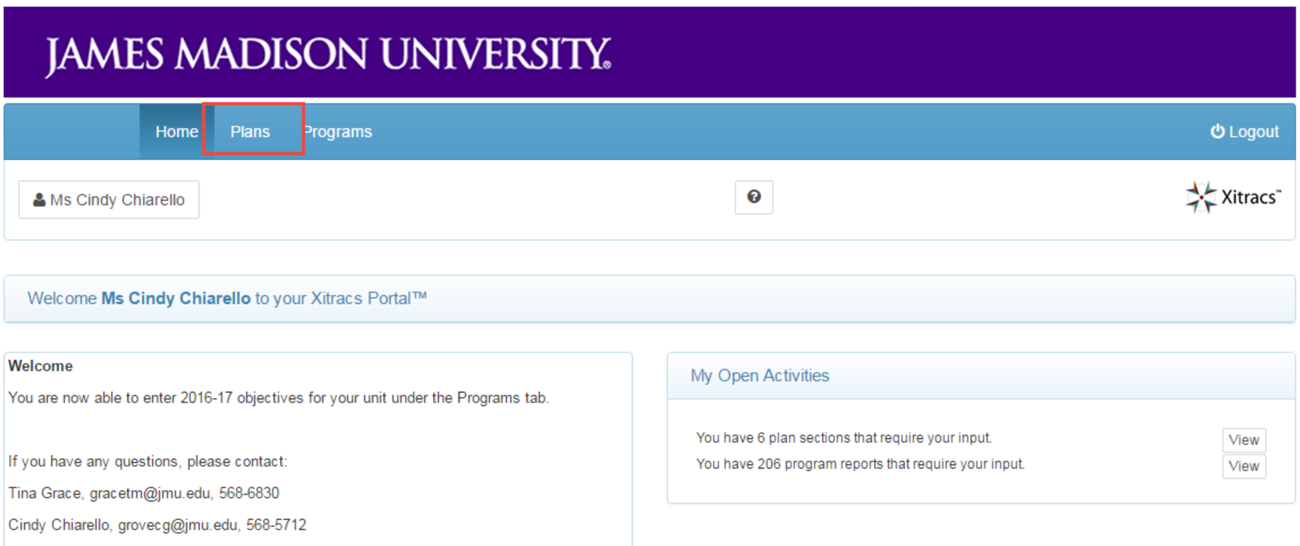
Repeat this process for other objective 1 elements as necessary.

PART II: Reporting

Reporting is usually done near the end of the plan year. Several plans required by the university have been combined into this section of the JMU-STAR Tool in an effort to reduce repetition and re-entering information in multiple platforms.

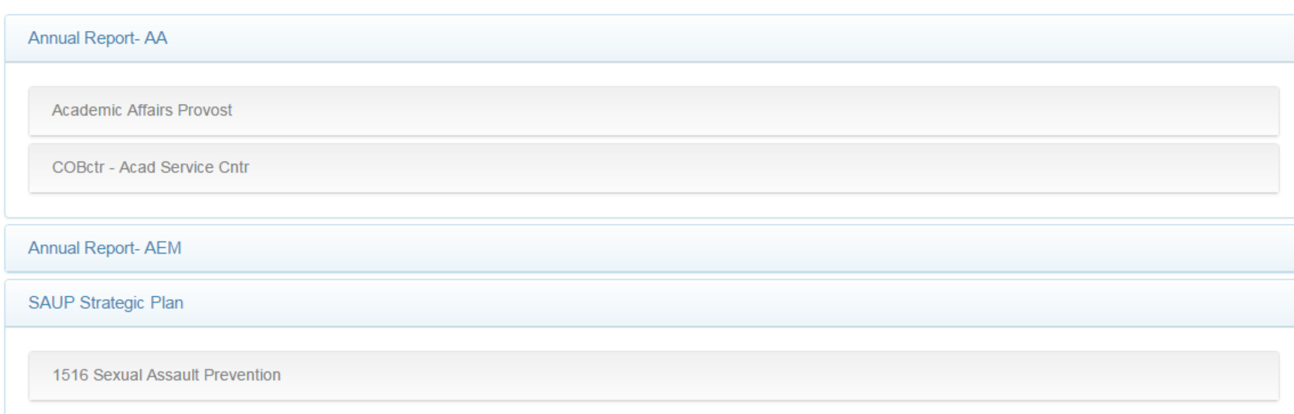
Navigating to Plans

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

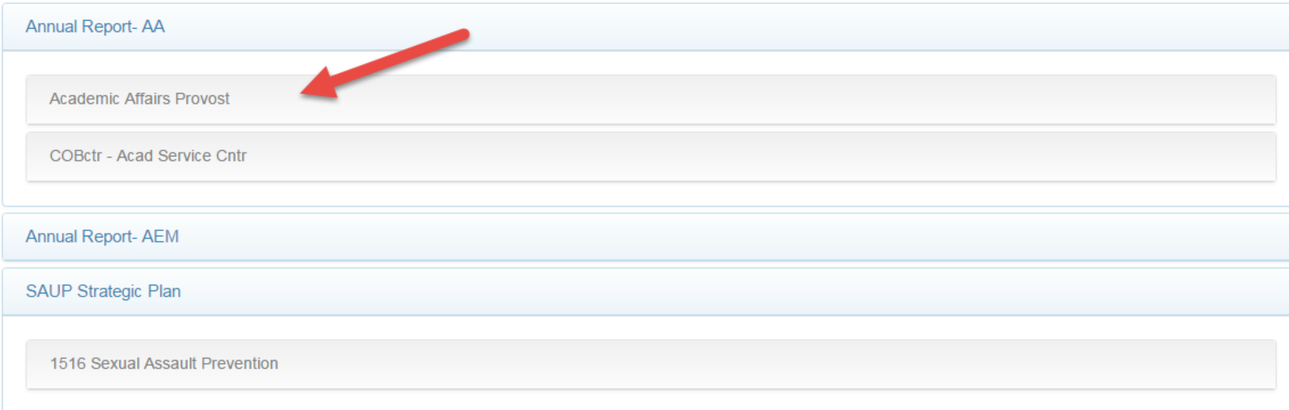


Annual Report

The **Plans** page lists the units for which you have edit rights for the annual report.

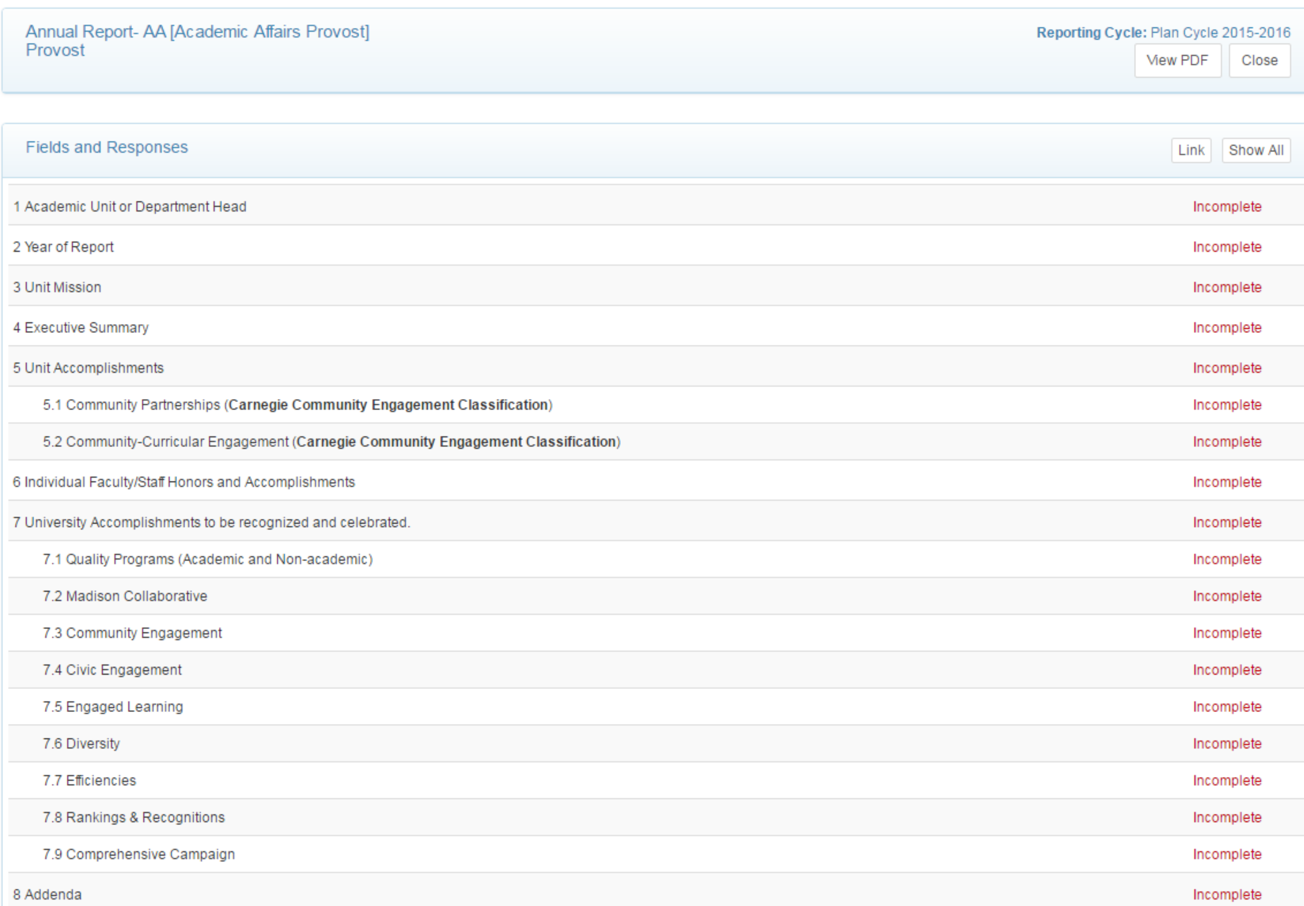


Click on the name of a plan to view/edit the annual report field set.



Elements of the Annual Report

The elements (field set) of the annual report are:



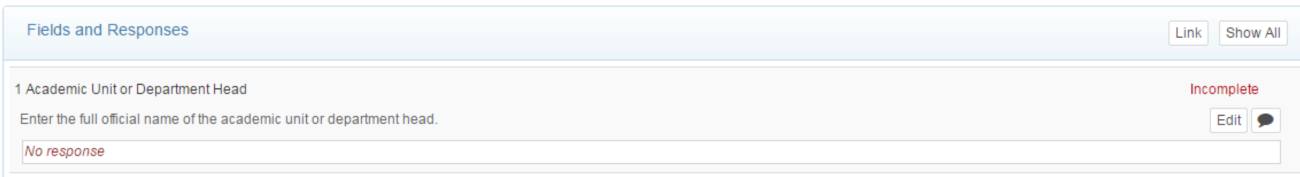
*NOTE: The **Incomplete** indicator denotes that the information has not been entered. Once information has been entered and is ready for review, manually change the status to **Complete**. This indicator only applies to entering information, not whether a particular objective is complete or incomplete.*

Entering Annual Report Information

(NOTE: In doing the work required to generate your annual report, you will likely do quite a bit of copying and pasting. Therefore, many will find it easier to work from a basic Word document and paste content from that document where appropriate in following the instructions below.)

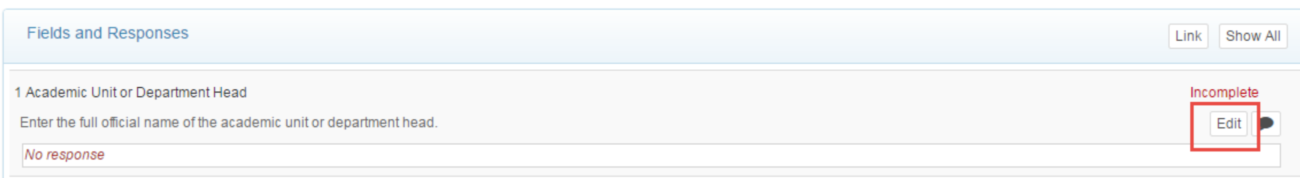
1 Academic Unit/Department Head

Click on the field **1 Academic Unit or Department Head**.

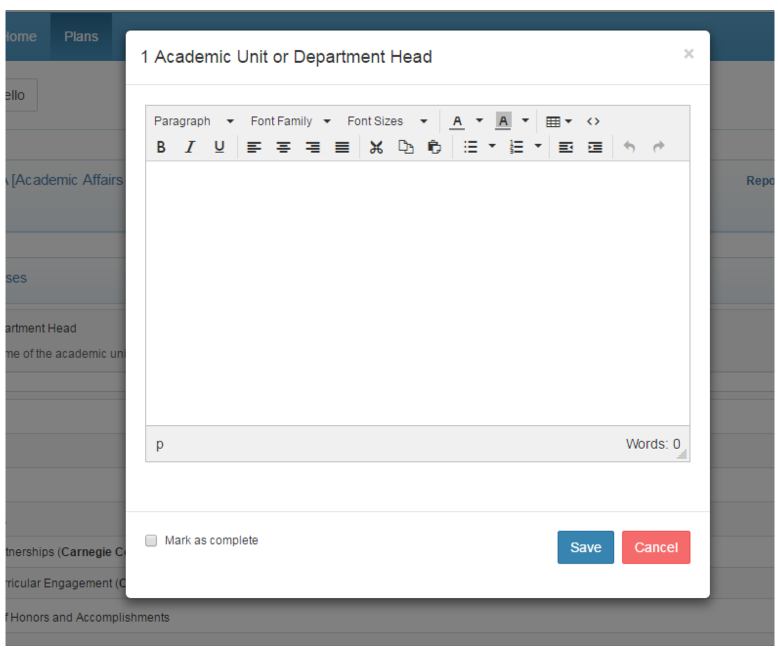


Brief instructions are located in the box.

Click **Edit** to open the composition window.



A pop up window will open. Enter the name in the large text space.



After the information has been entered, click the **Mark as complete box**. To save this information, click **Save**.

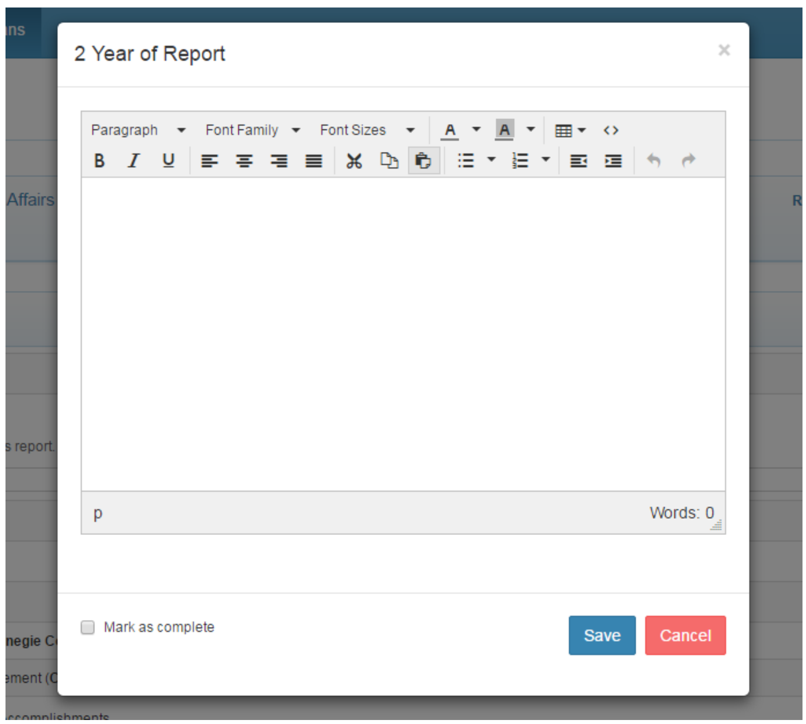
2 Year of Report

Click on the field **2 Year of Report**.

Brief instructions are located in the box.

Click **Edit** to open the composition window.

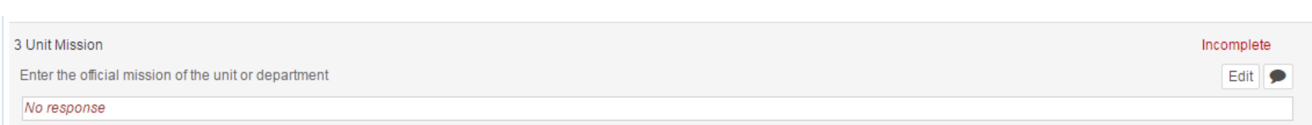
A pop up window will open. Enter the year in the large text space.



After the information has been entered, click the **Mark as complete box**. To save this information, click **Save**.

3 Unit Mission

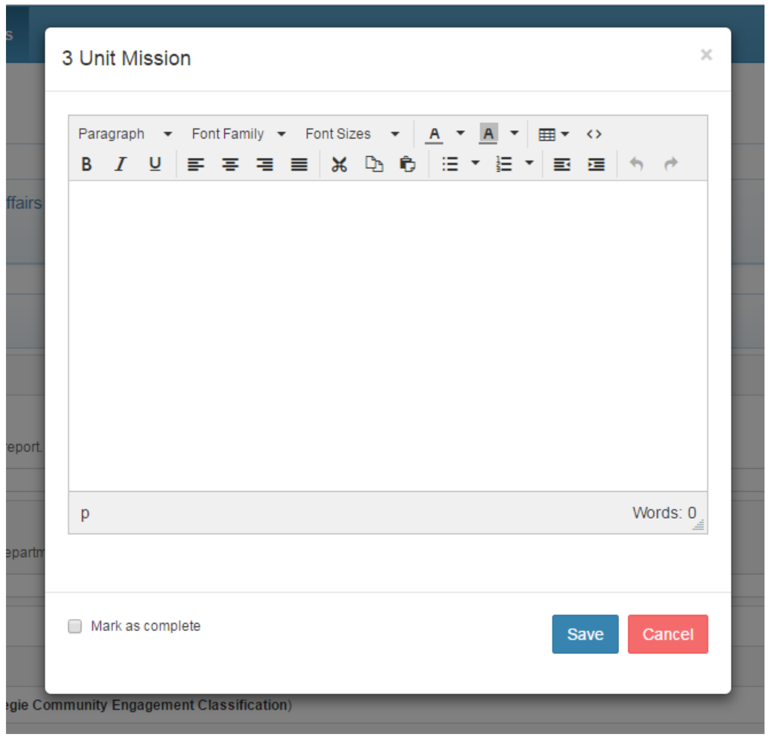
Click on the field **3 Unit Mission**.



Brief instructions are located in the box.

Click **Edit** to open the composition window.

A pop up window will open. Enter the information in the large text space. You can use the copy/paste function to bring in text from an existing document, and the style toolbar to further enhance your information.



After the information has been entered, click the **Mark as complete box**. To save this information, click **Save**.

4 Executive Summary

The **Executive Summary** is a brief overview of the activities and accomplishments of the unit.

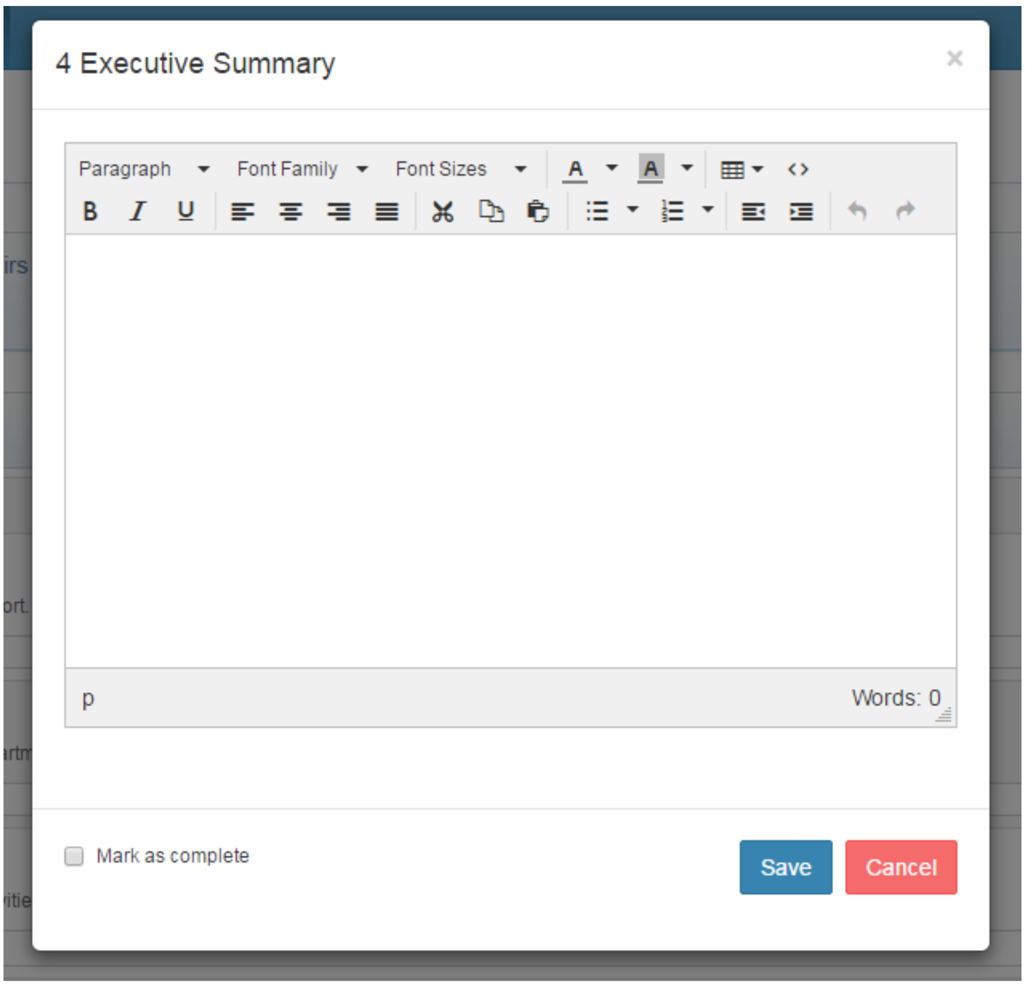
Here, write a narrative of 1-3 short paragraphs highlighting the key unit achievements for the plan year.

- Tell the unit's story for the year.
- Of what are you most proud?
- What achievements were most important?
- Which ones provide direct support for the university's mission/vision?
- Which of the university's core qualities received the most attention? How?
- What were key changes the unit underwent?
- What were challenges?

Click on the **4 Executive Summary** field.

Click **Edit** to open the composition window.

A pop up window will open. Enter the information in the large text space. You can use the copy/paste function to bring in text from an existing document, and the style toolbar to further enhance your information.

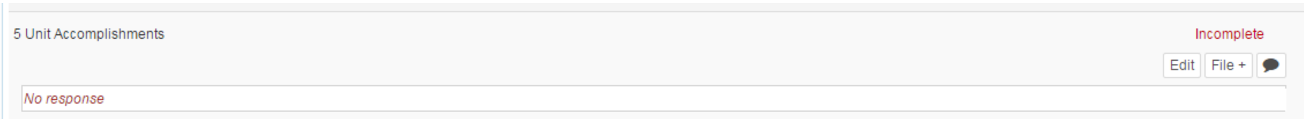


After the information has been entered, click the **Mark as complete** box. To save this information, click **Save**.

5 Unit Accomplishments

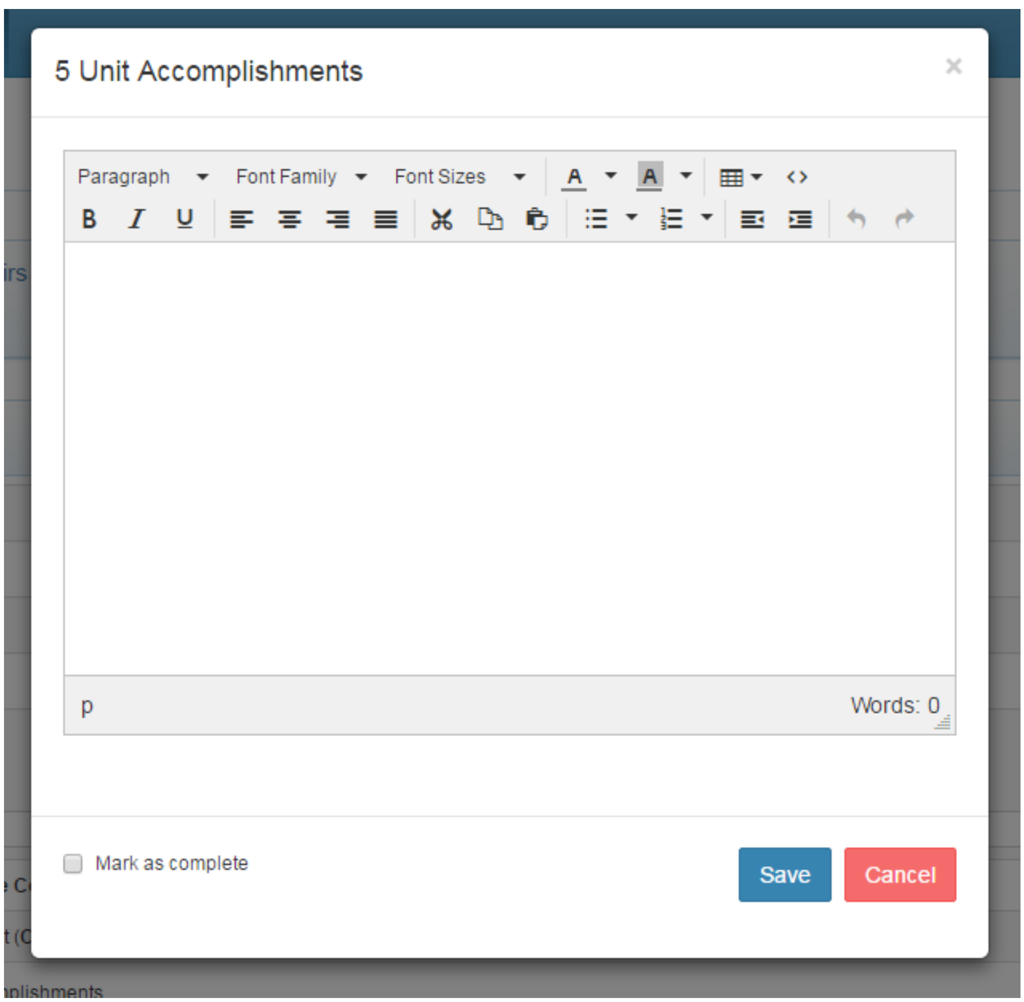
Record the notable accomplishments of the unit. The primary difference between the **Executive Summary** and the **Unit Accomplishments** is that the **Executive Summary** is a narrative designed to walk the reader through just the highlights of the unit's year. **Unit Accomplishments** is a bulleted list of all accomplishments that were significant enough that you would like them noted by your supervisor and division head. Include significant accomplishments of the unit, not just accomplishments generated from the objectives you listed in the **Programs** area of the JMU-STAR Tool. It's likely that any accomplishments from the **Executive Summary** section will be repeated/re-stated in the **Unit Accomplishments** section.

Click on the **5 Unit Accomplishments** field.



Click **Edit** to open the composition window for each section.

A pop up window will open. Enter the information in the large text space. You can use the copy/paste function to bring in text from an existing document, and the style toolbar to further enhance your information.

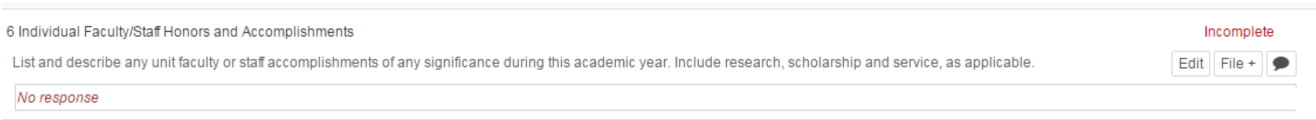


After the information has been entered, click the **Mark as complete** box. To save this information, click **Save**.

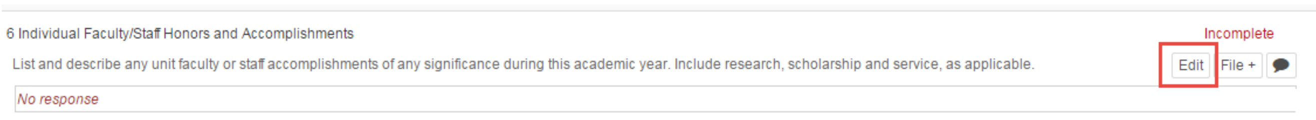
6 Individual Faculty/Staff Honors and Accomplishments

Record the notable **Individual Faculty/Staff Honors and Accomplishments**. This is your opportunity to note individual (or team) faculty or staff awards, honors, recognitions or achievements.

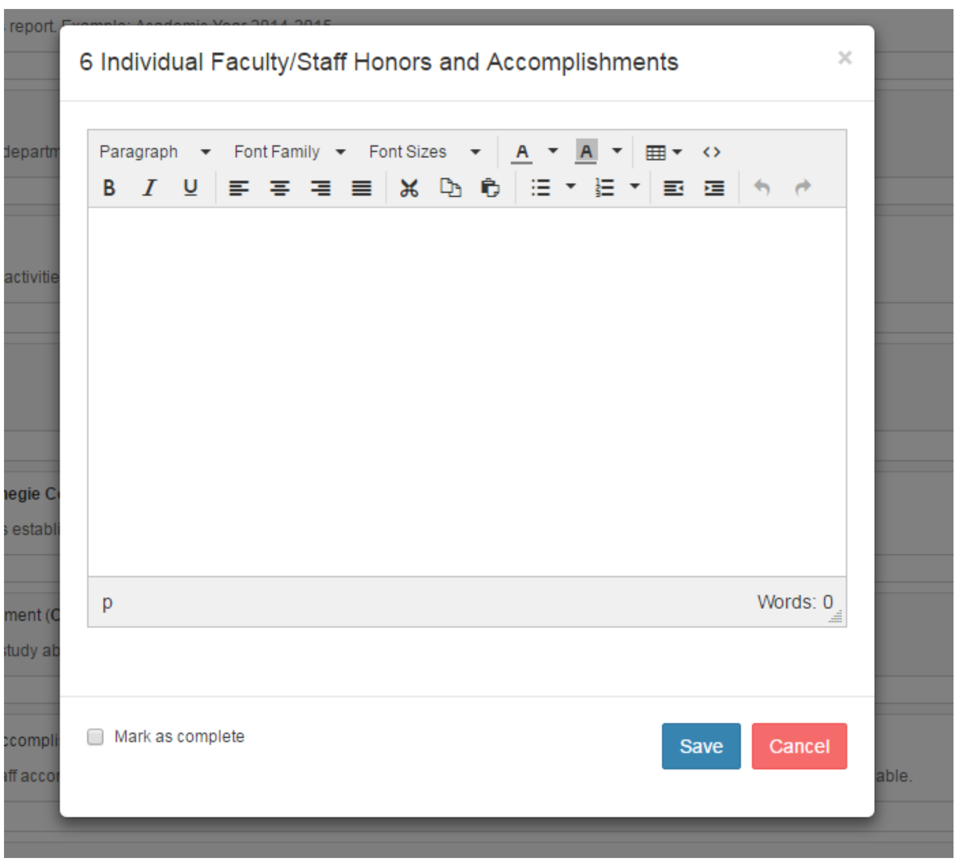
Click on the **6 Individual Faculty/Staff Honors and Accomplishments** field.



Click **Edit** to open the composition window.



A pop up window will open. Enter the information in the large text space. You can use the copy/paste function to bring in text from an existing document, and the style toolbar to further enhance your information.



After the information has been entered, click the **Mark as complete** box. To save this information, click **Save**.

7 University Accomplishments to be recognized and celebrated.

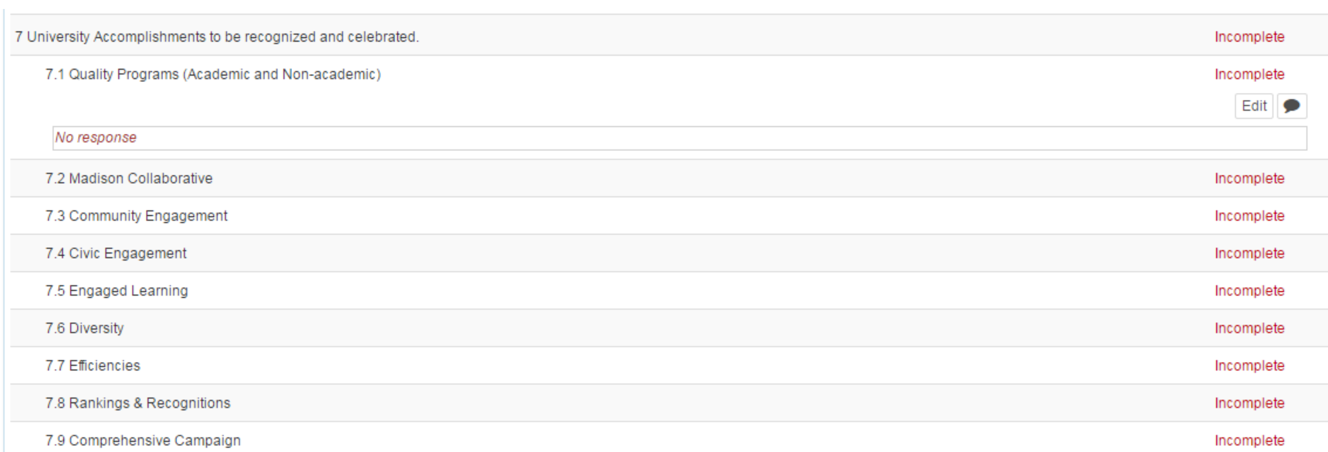
Information in Section 7 is used for the President's Annual Accomplishments Report. It is a different document than the Annual Report generated through the process you have just completed, although the two documents have some common content. The accomplishments report is used by the president in his speeches and communications and by other university leaders in promoting noteworthy university achievements to various constituencies.

Section 7 is your opportunity to suggest items from your unit achievements in the plan year to be included in the President's Report and to organize those accomplishments using the 9 categories in sections 7.1 through 7.9. Every item you enter in Section 7 will be something already included in sections 4 through 6—redundancy is necessary. *(Repeating it here is your way of recommending it for inclusion in the President's Report.)*

To complete Section 7, copy items from sections 4 through 6 and paste each into its appropriate category of Section 7. It's likely you will not include a contribution in all of the sub-categories below.

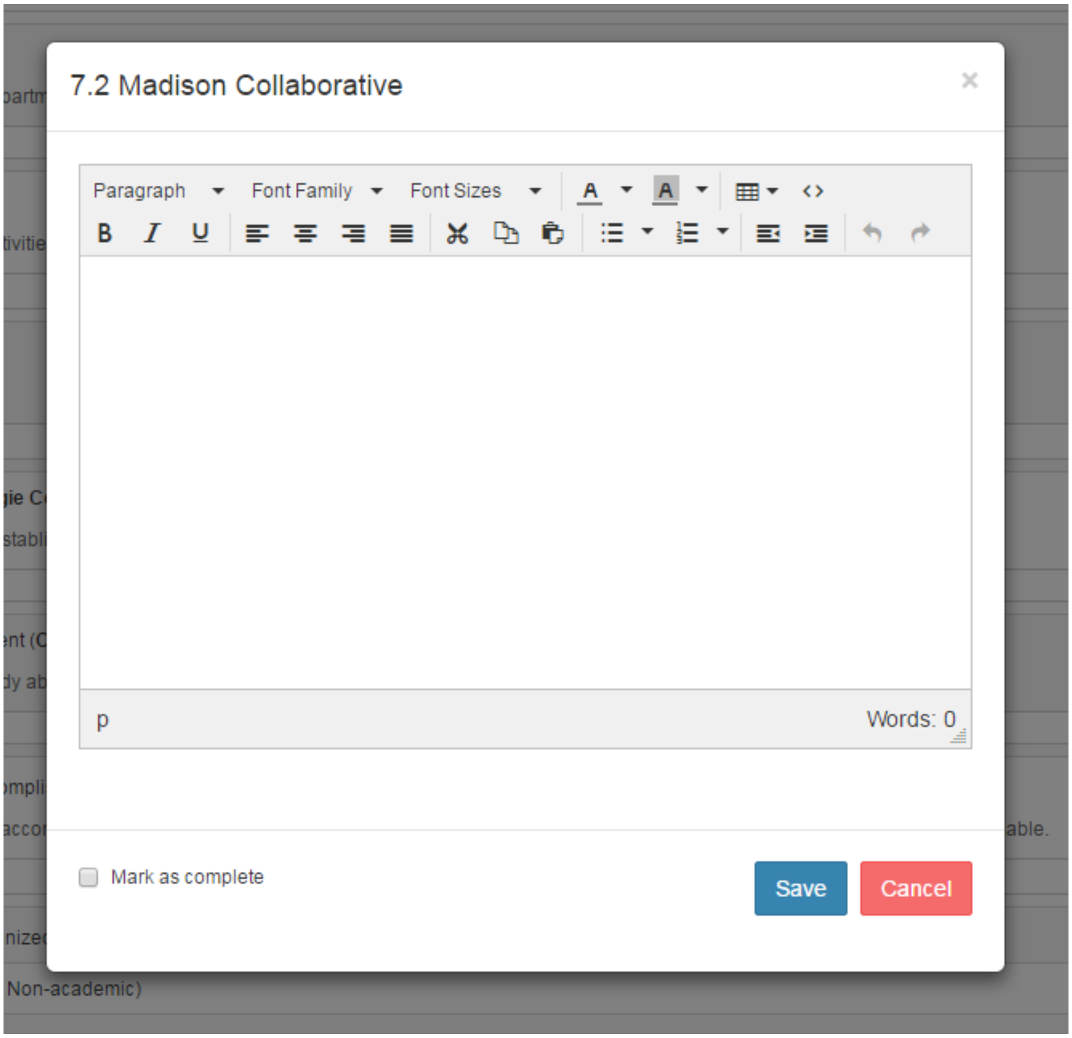
If you believe a particular accomplishment/achievement fits in more than one category below, paste it into both.

*NOTE: The first field (**University Accomplishments to be recognized and celebrated**) is the header; do not enter information in this box.*



Click **Edit** to open the composition window for each section.

A pop up window will open. Enter the information in the large text space. You can use the copy/paste function to bring in text from an existing document, and the style toolbar to further enhance your information.



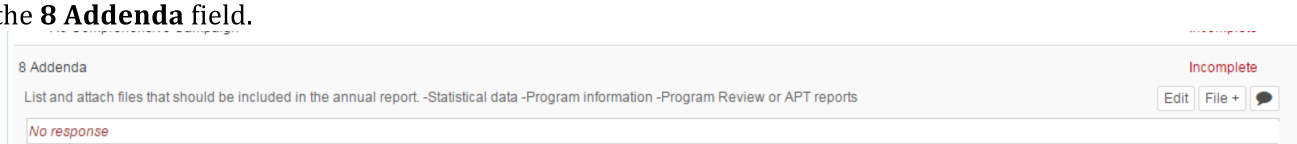
After the information has been entered, click the **Mark as complete** box. To save this information, click **Save**.

8 Addenda

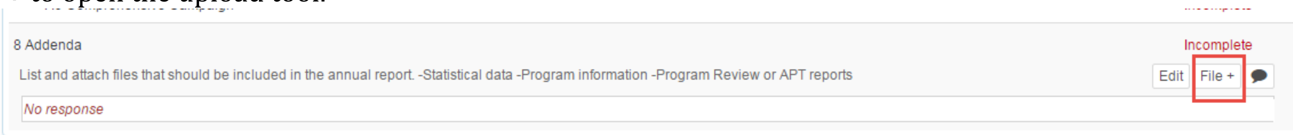
Attach files that should be included in the annual report.

- Statistical data
- Program information
- Program Review or APT reports

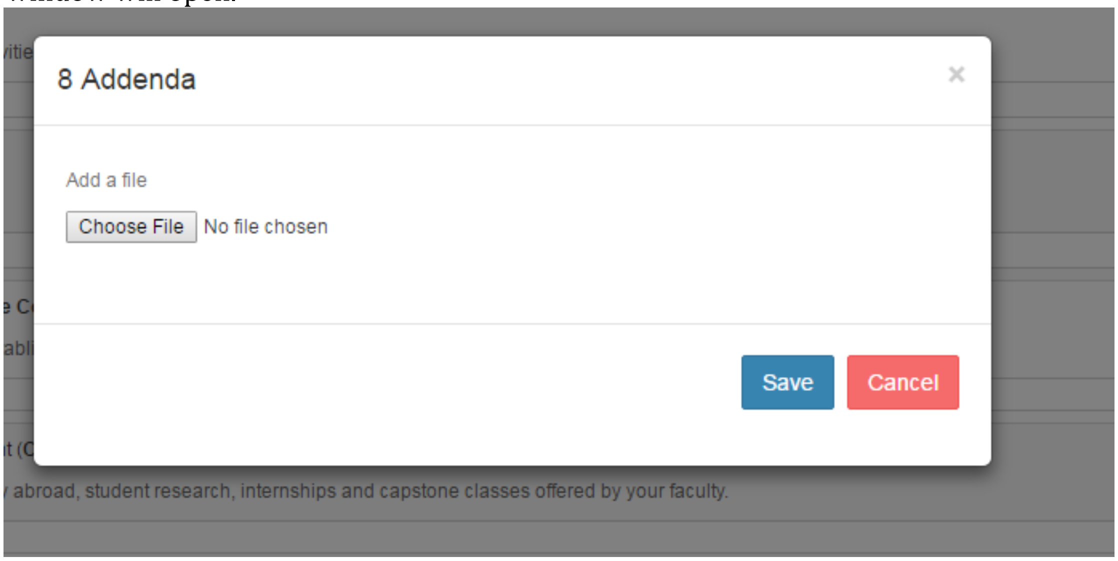
NOTE: Convert all files to .pdf before uploading to JMU-STAR.
Click on the **8 Addenda** field.



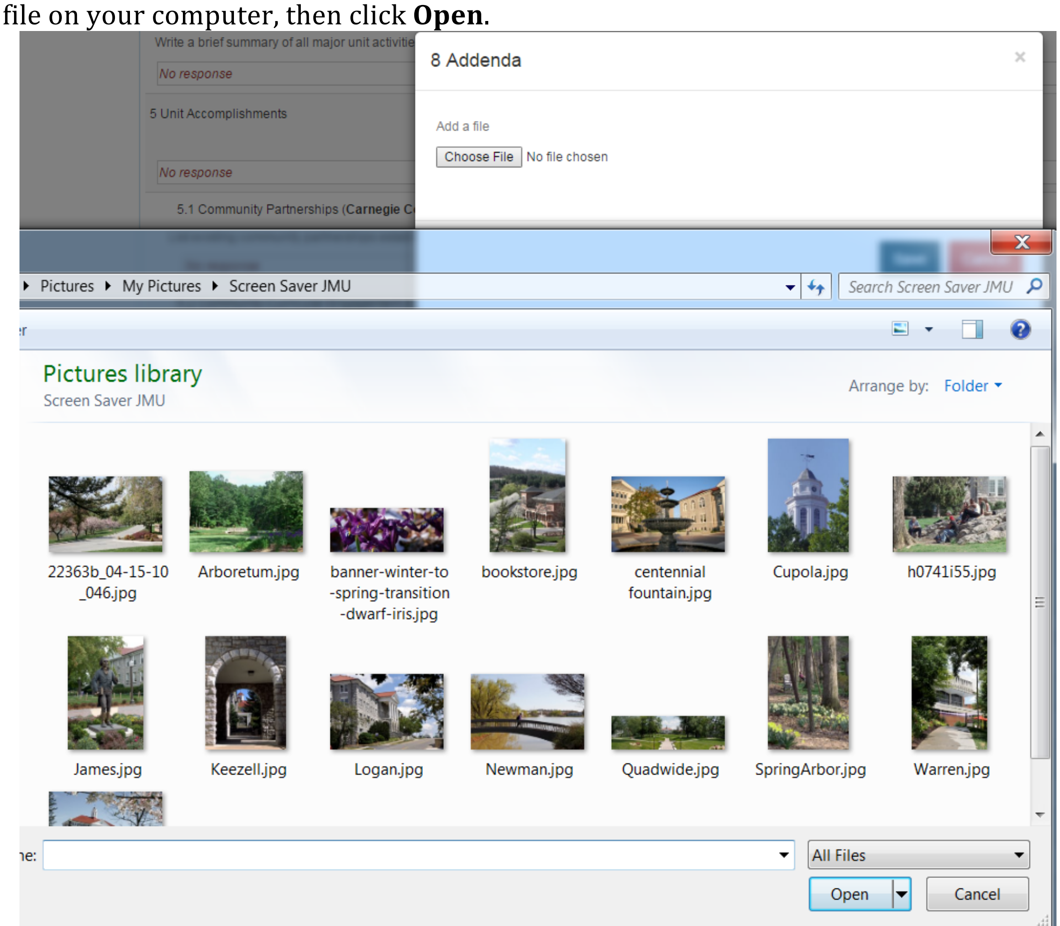
Click **File +** to open the upload tool.



A pop up window will open.



Click **Choose File** to browse for the .pdf document you want to upload/append.
Locate the file on your computer, then click **Open**.



The file name will be automatically added to the response box.

Click **Save** to upload the file.

Submitting the Annual Report

Your Annual Report includes the current objectives and the upcoming objectives for your area (entered in the Program section of the JMU-STAR tool) and your annual report for your area (entered in the Plan section of the JMU-STAR tool.) These two reports combined create your Annual Report that can be submitted to your VP/AVP/Dean.

NOTE: Before beginning the submission process, make sure you have entered information for the following objective fields:

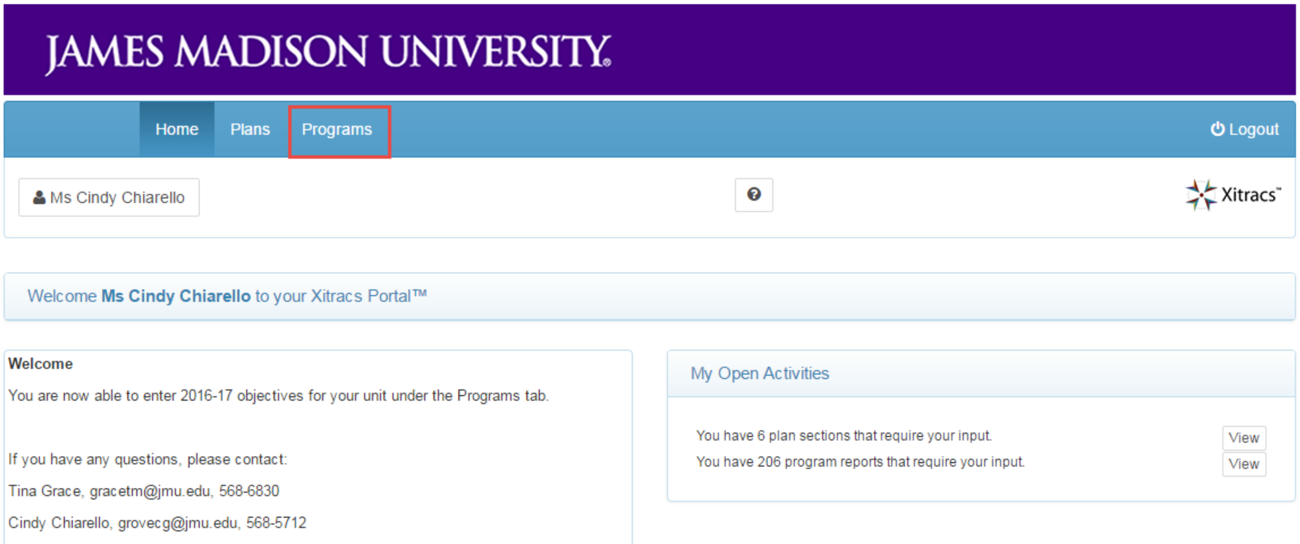
Current Year Plan Cycle: All fields should be completed (unless optional.) I.e. you should have entered all information for your objectives, including ***Objective Accomplishments*** *and* ***Use of Results.***

*Upcoming Year Plan Cycle: Fields 1 (**Objective Name and Link to Plans**) through 1.6 (**Budget Initiative**) should be complete.*

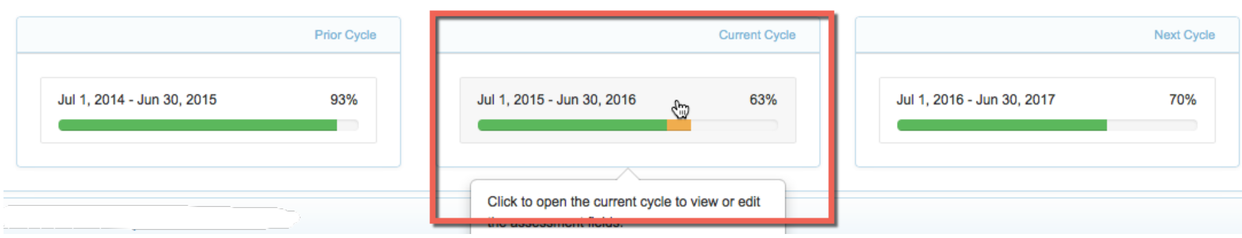
Create a PDF of the Current Objectives

Log in to the JMU-STAR tool.

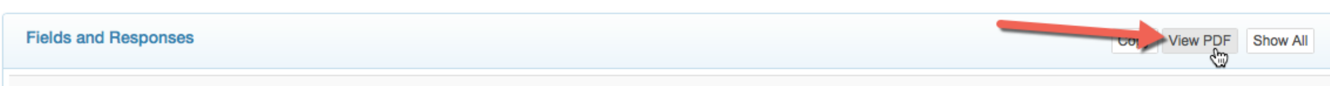
From the Welcome Page, click on **Programs**.



Choose **Current Cycle**.



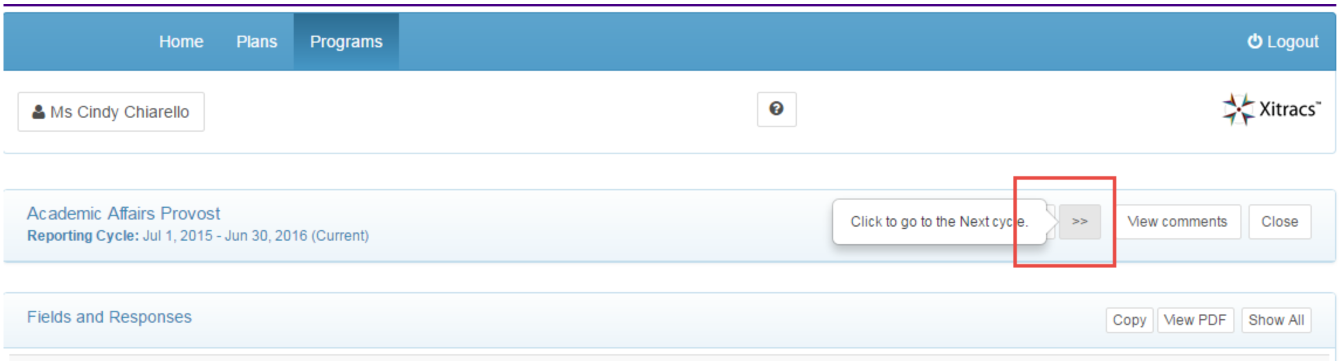
In the top bar **Fields and Responses**, click on **View PDF**.



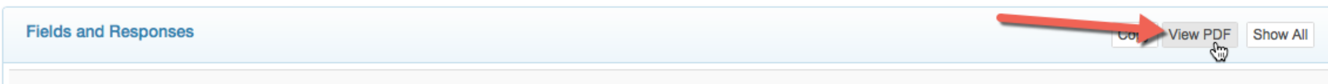
A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

Create a PDF of the Upcoming Objectives

Navigate to the upcoming objectives **(Next Cycle)** by clicking on the **>>** button in the top header.



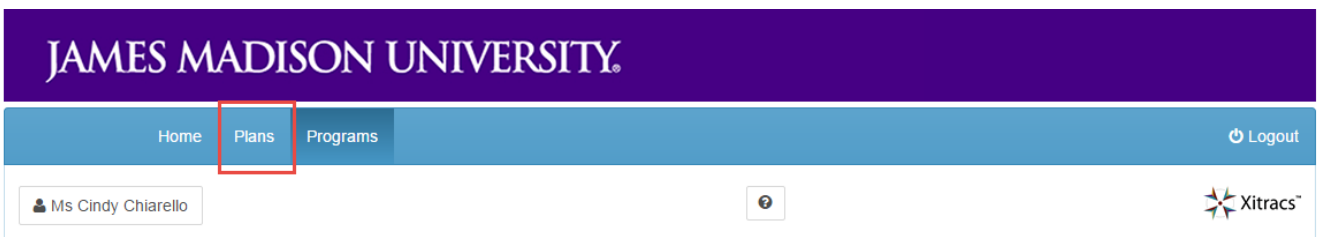
In the top bar **Fields and Responses**, click on **View PDF**.



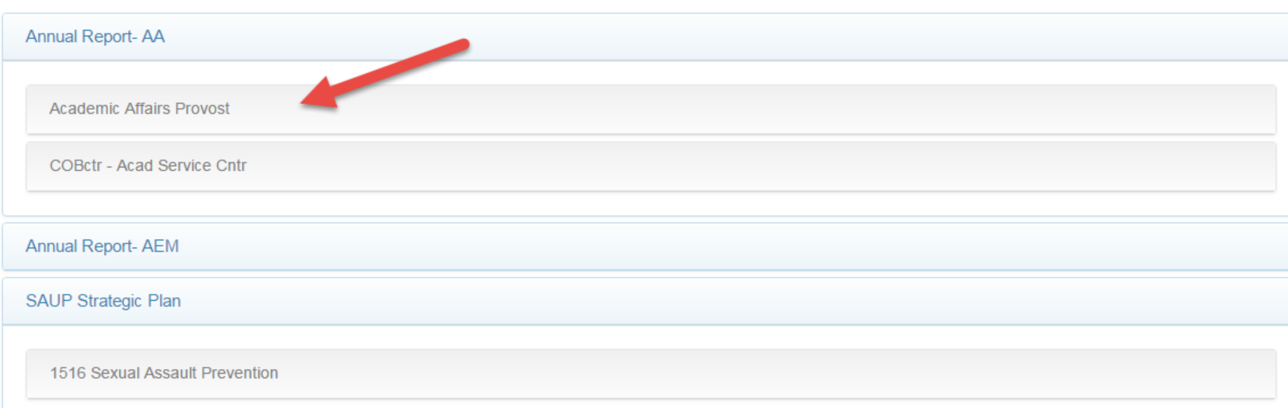
A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

Create a PDF of the Annual Report

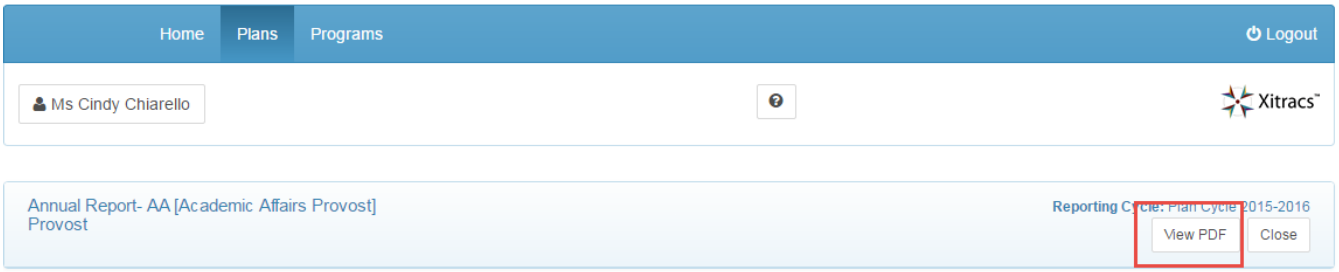
Navigate to **Plans** by clicking on **Plans** in the top menu bar.



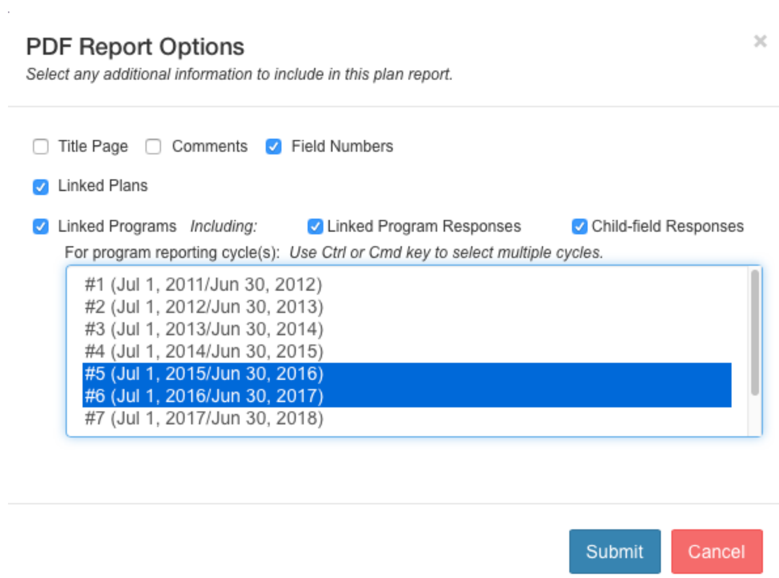
Click on a plan to view the annual report field set.



Click on **View PDF**.



A pop up window will open with **PDF Report Options**. Select the desired options, then click **Submit**.



A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

This PDF will include your annual report information (executive summary, faculty and staff accomplishments and Section 7-information for the President's Accomplishments Report); objectives for your unit, as well as objectives linked to your annual report by your direct reports from the most recent year and the next year.

Review the PDF to be sure all of your objectives and those of your direct reports are included. Go back and link objectives as necessary (see page 16).

Your Annual Report (one PDF document) is now ready for submission to your AVP/Dean.

NOTE: Contact your AVP/Dean for information on how they prefer to receive your Annual Report (e.g. via email, on your JMU Network shared drive, etc.)

Part III: Planning Cycle Processes

This section describes JMU-STAR processes that occur each plan year.

End-of-Year

Email Sent To Users

To remind and guide users to complete year-end tasks in JMU-STAR, an email is sent to all users usually at the end of April/beginning of May.

The text below was sent in April 26, 2016:

(You're receiving this email because you are a JMU-STAR planning tool user who likely is involved in generating an Annual Report.)

Good Day,

It is time to invest in producing your department's Annual Report.

Action
Annual Reports will be due in the JMU-STAR planning system sometime during June/July as set by your Division Head, Dean or AVP. **Annual Reports from the division heads will be due by 3:00 p.m. on July 20**, so due dates from departments could possibly be by the first of July. Please check with your Dean or AVP for specific dates as they may be somewhat earlier than any dates referenced here.

Suggested target dates are:
Academic Units/Departments: Wednesday, July 6
Dean/AVP: Wednesday, July 13

Value
The process of setting objectives, evaluating results, and applying those results to future initiatives is essential in telling the story of JMU's success.

Objectives
The 2015-16 objectives are linked to the Core Qualities of the Strategic Plan. Please check to be sure that your objectives for 2015-16 are associated with the correct Core Quality and University Goal (http://www.jmu.edu/jmuplans/_docs/Strategic_Plan.pdf).

Please see the attached year-end tasks document that outlines the specific activities to be completed. Of important note are:

- 2015-16 Objectives: Complete the steps:
  - Objective Accomplishments information
  - Use of Results for each objective.
- 2016-17 Objectives: Update objectives to reflect changes to the objective based on outcomes of 2015-16. Include changes/activities identified in the 2015-16 Use of Results; enter these changes in the 2016-17 objective text or Steps to Reach the Objective boxes.

Annual Report
In addition, annual reports are important as a way to highlight the progress of departments over the past year. They are also valuable because they help to produce the Annual Accomplishments Report for the university. The President reviews this report each year. It also informs institutional messaging within letters, articles, speeches, reports, etc. Please continue to help your department and the university recognize its achievements, which are truly our achievements.

NEW THIS YEAR- Carnegie Community Engagement Classification Information
Section 5 of the Annual Report has two supplementary fields related to the Carnegie Community Engagement Classification. The university will be applying for recertification of the classification in 2018, and these fields will provide a way to gather critical information from the academic units to support this application. The information supplied by the academic units will begin the data collection to be followed up with a more detailed conversation about the activities, number of students, faculty and community members impacted.

The University's Annual Accomplishments Report
As part of the annual report format, we are including fields that will be used to inform the 2015-16 Annual Accomplishments Report. This information will be used by the president in his speeches and communications and by other university leaders in promoting noteworthy university achievements to various constituencies.

Here is a screen shot of the section related to the Annual Accomplishments Report.

7 University Accomplishments to be recognized and celebrated.

- **7.1 Quality Programs (Academic and Non-academic)**
- **7.2 Madison Collaborative**
- **7.3 Community Engagement**
- **7.4 Civic Engagement**
- **7.5 Engaged Learning**
- **7.6 Diversity**
- **7.7 Efficiencies**
- **7.8 Rankings & Recognitions**
- **7.9 Comprehensive Campaign**
- **7.10 Other Noteworthy Accomplishments**

What you need to do to complete Section 7
Academic Units/University Departments: Enter information from your annual report for the categories in Section 7 as appropriate. This means that information in Section 7 is likely content that is copied and pasted from other sections from your annual report that you believe should be considered for use in the President's Report. You may include a single achievement/accomplishment in more than one part of Section 7 if you feel it applies to more than one. Every field does not require an entry by every unit.

AVPs/Deans/Vice Provosts: Review information submitted in Section 7 by your direct reports. Copy/Paste appropriate information from your direct reports, as well as your own unit, into Section 7 of your own annual report.

Vice Presidents: Review information submitted in Section 7 by your units. Copy/Paste appropriate information from your units into Section 7 of your own annual report.

You may want to have a conversation with your immediate supervisor to get an idea of what kinds of accomplishments/achievements he/she would expect to see in your Section 7.

At JMU, there is a great story to be told, please help us to tell it well. Last year's report is posted for your review.

If you or someone you know will need a refresher or access to the JMU-STAR tool, please contact Tina Grace (gracetm) or Cindy Chiarello (grovecg) to arrange training. Attached is an end-of-year refresher for your convenience and other resources are also available online. Please contact Tina or Cindy should you need assistance of any kind.

Brian Charette
Tina Grace
Cindy Chiarello

Guidelines for Tasks

The following guidelines (step-by-step instructions) are usually attached to the **Email Sent To Users** as a stand-alone document.

End-of-Year Tasks Reminder for JMU-STAR

1. Update Current Cycle Objectives with Accomplishments and Use of Results
2. Review/Update/Enter Next Cycle Objectives
3. Enter Annual Report Information
4. Submit Annual Report.

Access the JMU-STAR Tool and Log In

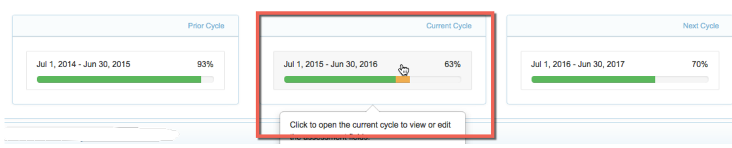
- From http://www.jmu.edu/jmuplans, click on the link for the **JMU-STAR Tool** (located on the Planning Links menu on the right).
- Log in:
  - Username is your full JMU email address
  - Your default password for training was your JMU e-ID (e.g., gracetm), but you may have changed this after training was over.

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, click the "forgotten" password link on the log in page.

Update Current Cycle Objectives with Accomplishments and Use of Results

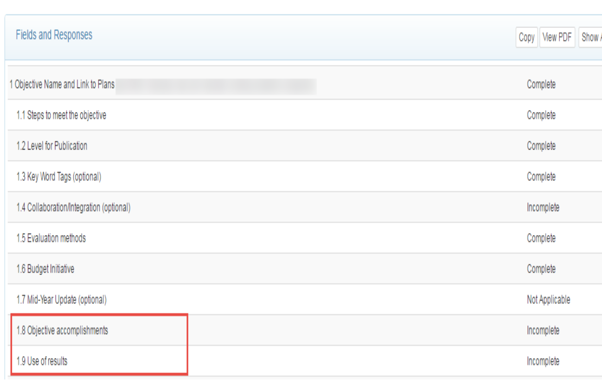
- From the Welcome Page, click on **Programs.**

- Choose the Current Cycle.



Objective Accomplishments and Use of Results

- For each objective, complete the *1.8 Objective Accomplishments* and the *1.9 Use of Results* fields
  - Click on the field name to open it and then click **Edit.**
  - After information is entered, click **Save.**



Objective Accomplishments:

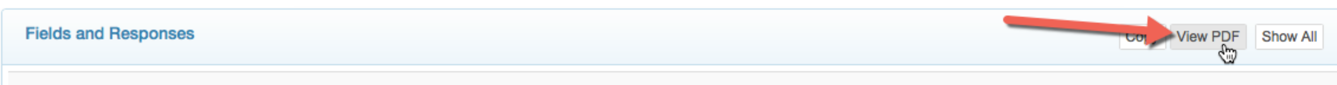
In the large text area, describe the extent to which this objective has been accomplished. The description should fully communicate the extent to which each of the specific activities outlined in section 5 *Steps to Reach the Objective* have been achieved and the changes that occurred. Include analysis of what happened.

Use of Results:

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).

Create PDF of the Current Objectives

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



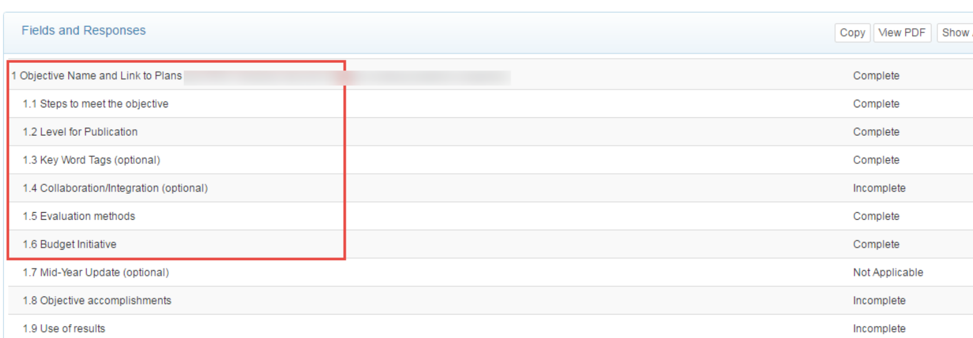
- A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

Review/Update/Enter Next Cycle Objectives

- From the Welcome Page, click on *Programs*
- Click on *Next Cycle*.

Review your objectives for the upcoming year.

Fields 1 (*Objective Name and Link to Plans*) through 1.6 (*Budget Initiative*) should be complete, as applicable.



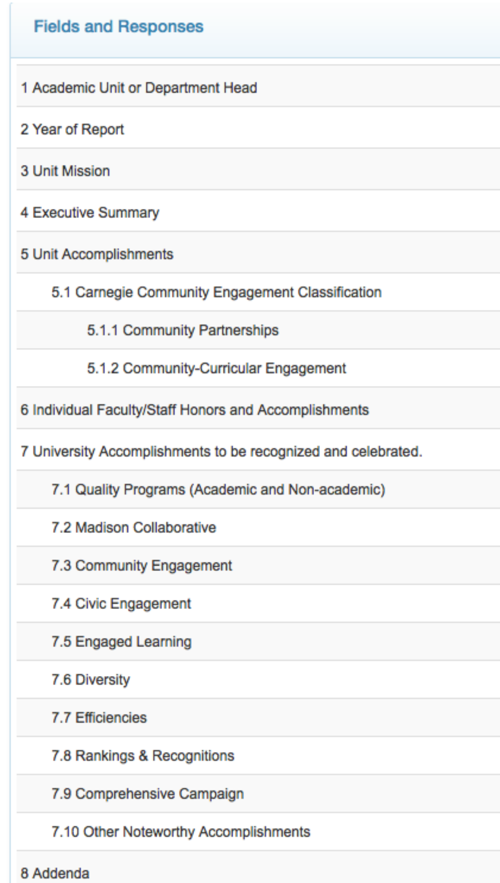
Create PDF of the Upcoming Objectives

- In the bar above objective 1, *Fields and Responses*, click on *View PDF*.
- A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

Enter Annual Report Information

- From the Welcome Page, click on *Plans*.
- Click on a unit name to edit the annual report field set.

Fill in information for each field (1-8.)



NEW THIS YEAR.

Section 5, *Unit Accomplishments*, of the Annual Report for the Division of Academic Affairs has two supplementary fields related to the Carnegie Community Engagement Classification. The university will be applying for recertification of the classification in 2018, and these fields will provide a way to gather critical information from the academic units to support this application. The information supplied by the academic units will begin the data collection to be followed up with a more detailed conversation about the activities, number of students, faculty and community members impacted.

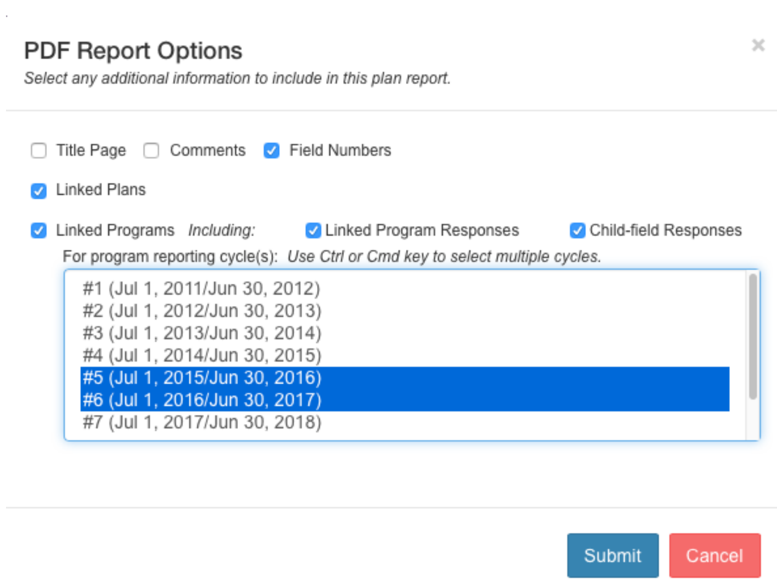
President's Annual Accomplishments Report

Section 7, *University Accomplishments*, to be recognized and celebrated. The categories in Section 7 allow is your opportunity to suggest items from your unit achievements to be included in the President's Annual Accomplishments Report. It is used by the president in his speeches and communications and by other university leaders in promoting noteworthy university achievements to various constituencies.

To complete Section 7, review information in sections 4 through 6, copy/paste pertinent text into its appropriate category of Section 7. It's It's likely you will not include a contribution in all of the sub-categories. If you believe a particular accomplishment/achievement fits in more than one category, paste the text under all as appropriate.

Create PDF

- Once you have entered information for all fields, click on *View PDF* in the plan header.
- A pop up window will open with PDF Report Options. Select the desired options, then click **Submit.**



A new tab will open in your browser with the PDF. From here, you can download/save the file to your computer.

This PDF will include your annual report information (executive summary, faculty and staff accomplishments and Section 7-information for the President's Accomplishments Report); objectives for your unit, as well as objectives linked to your annual report by your direct reports from the most recent year and the next year.

Review the PDF to be sure all of your objectives and those of your direct reports are included. Go back and link objectives as necessary (see page 16).

Your Annual Report (one PDF document) is now ready for submission to your AVP/Dean.

NOTE: Contact your AVP/Dean for information on how they prefer to receive your Annual Report (e.g. via email, on your JMU Network shared drive, etc.)