Annual Reporting

James Madison University

Strategic Accountability and Reporting Tool

JMU-STAR

Revision Date: 5/19/2015

JMU Strategic Accountability and Reporting (JMU-STAR) Tool Portal

If you have already established a login and used the JMU-STAR Tool, please log in and skip to Section 1: Annual Report

Log in

From http://www.jmu.edu/jmuplans, click on the link for the JMU-STAR Tool
Log into Portal: Link: https://jmu.xitracs.net/survey/portallogon.jsp

    Email: use JMU email address (*user*@jmu.edu)
    Password: use JMU e-ID (like gracetm)
    After training, click the "forgotten" password link to change your password.

Welcome Page

On the welcome page, click on the programs link or on Programs in the grey header bar.

I. Select Annual Report

Plans

Choose the Plans tab at the top of the welcome (home) page, or click on the blue link called "plan sections."
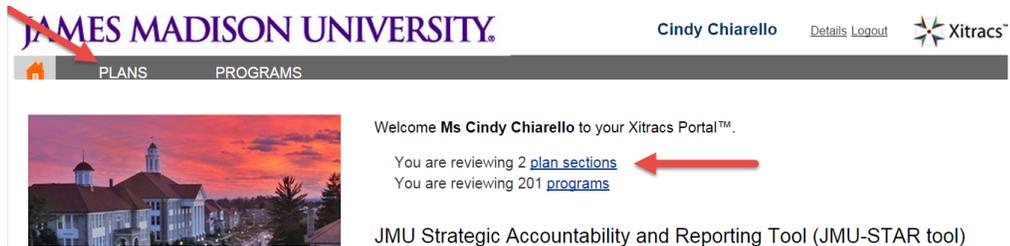
Plans List

The Plans page lists the units for which you have edit rights for the annual report.
Click OPEN to view/edit the annual report field set.

Title	Function
Annual Report- AEM	
Access and Inclusion-Campus	Open
Admissions	Open
AEM VP	Open
Environmental Stewardship/Sust	Open

Elements of the Annual Report

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

Fields and Responses	[PDF Version] [⊞ Expand All]
1 Academic Unit or Department Head	Incomplete
2 Year of Report	Incomplete
3 Unit Mission	Incomplete
4 Executive Summary	Incomplete
5 Unit Accomplishments	Incomplete
6 Individual Faculty/Staff Honors and Accomplishments	Incomplete
7 University Accomplishments to be recognized and celebrated.	Incomplete
7.1 Quality Programs (Academic and Non-academic)	Incomplete
7.2 Madison Collaborative	Incomplete
7.3 Community Engagement	Incomplete
7.4 Civic Engagement	Incomplete
7.5 Engaged Learning	Incomplete
7.6 Diversity	Incomplete
7.7 Efficiencies	Incomplete
7.8 Rankings & Recognitions	Incomplete
7.9 Comprehensive Campaign	Incomplete
8 Addenda	Incomplete

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."

II. Enter 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.)

Section 1: Academic Unit/Department Head

1. Click on the field 1. Academic Unit or Department Head.
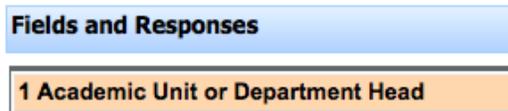
2. Brief instructions are located in the box.
3. Click Edit to open the composition window.

a. Enter the name in the large text space.

1 Academic Unit or Department Head

Enter text below

Enter Unit Head Name

OK   Cancel   ☐ Mark as complete

b. After the information has been entered, click the "Mark as complete" box.
c. To save this information, click "OK" in the bottom left.

Section 2: Year of Report

1. Click on the Year of Report field.

2. Click Edit to open the composition window.

   a. Enter the Report Year (2014-2015) in the large text space.
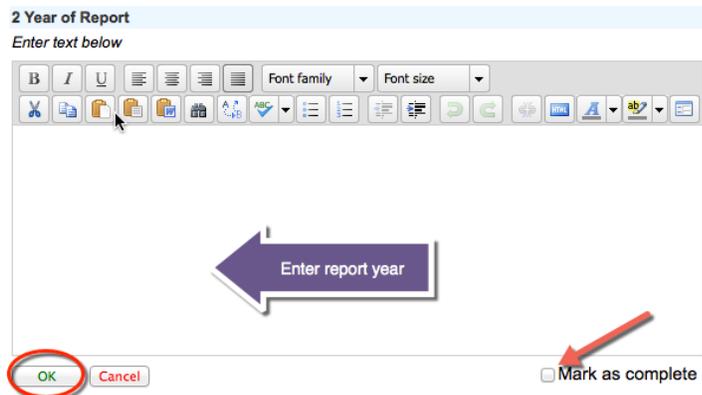
   b. After the information has been entered, Click the "Complete" box.

   c. To Save this information, Click "OK" in the bottom left.

Section 3: Unit Mission

1. Click on the Unit Mission field.

3 Unit Mission

2. Click Edit to open the composition window.

3 Unit Mission   Incomplete

Enter the official mission of the unit or department.

Response   Edit Comment

No response
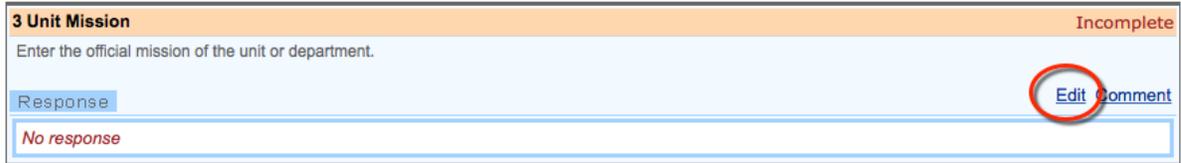
   a. Type the unit mission statement in the large text space.

3 Unit Mission

Enter text below

paste tools

Enter Unit Mission

OK   Cancel   ☐ Mark as complete
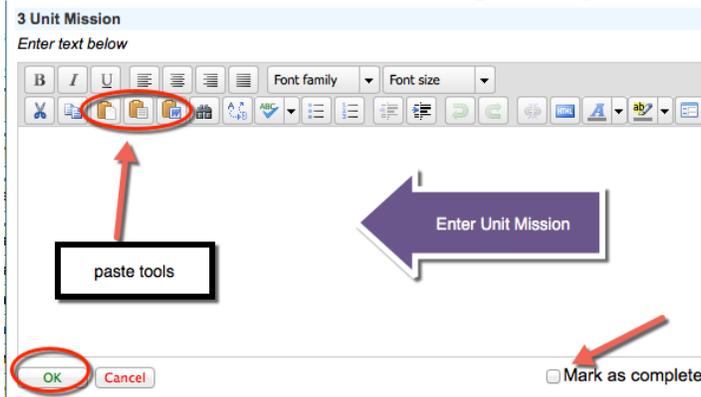
- Or copy and paste from an original document
  - Use keyboard shortcuts: Copy=Control C   Paste= Control V
  - When copying and pasting from Word, use the paste tools—see screen shot.

    - Click on the clipboard with the "W" (   ); a new editing window will open
    - Paste your text into the edit box and click "Insert".
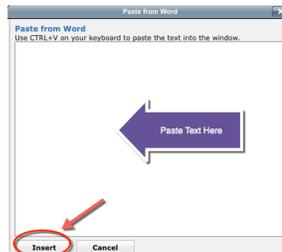
Paste from Word
Use CTRL+V on your keyboard to paste the text into the window.

Paste Text Here

Insert   Cancel

   b. After the information has been entered, Click the "Complete" box in the bottom right.

   c. To Save this information, Click "OK" in the bottom left.

Section 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 2014-2015.

- 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?

1. Click on the Executive Summary field.

2. Click Edit to open the composition window.
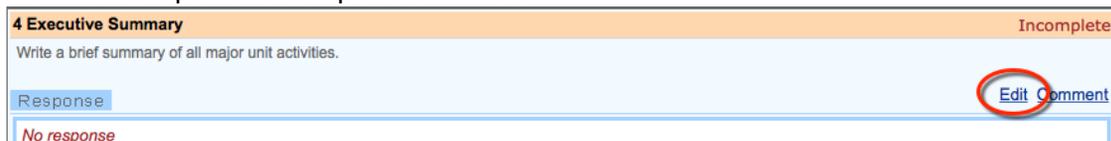
   a. Enter the Executive Summary in the large text space.

   Using the copy/paste instructions in the previous section, enter the text.
   b. After the information has been entered, click the "Mark as complete" box.
   c. To save this information, click "OK" in the bottom left.

Section 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. Most will be accomplishments generated from the objectives you listed in the STAR-TOOL, but your list may include other accomplishments as well. It's likely that any accomplishments from the executive summary section will be repeated/re-stated in the Unit Accomplishments section.

1. Click on the Unit Accomplishments field.

   5 Unit Accomplishments

2. Click Edit to open the composition window.

   5 Unit Accomplishments   Incomplete
   List unit accomplishments, recognitions or other noteworthy items.

   Response   Add a file Edit Comment

   a. Enter the Unit Accomplishments in the large text space.
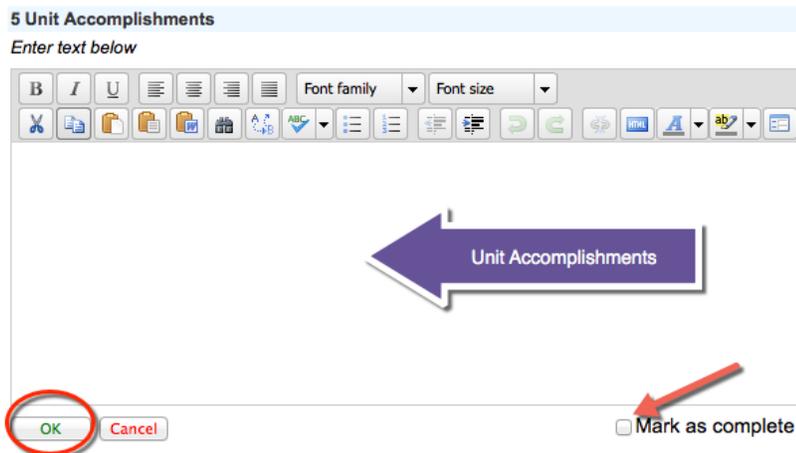
   5 Unit Accomplishments
   Enter text below

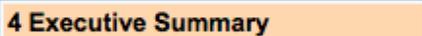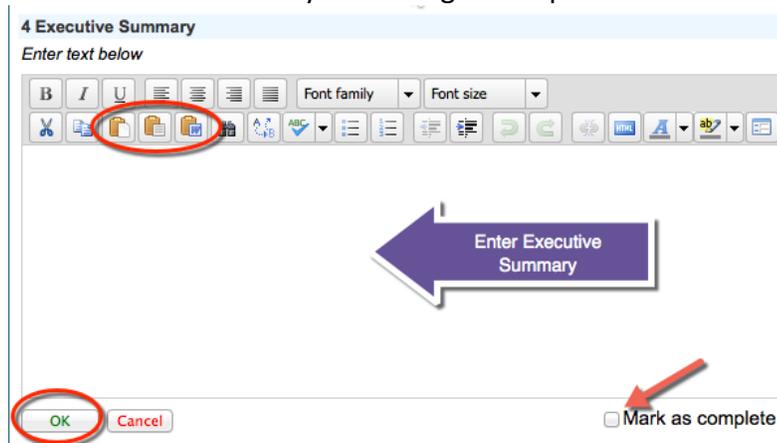   Unit Accomplishments

   OK   Cancel   ☐ Mark as complete

   b. After the information has been entered, Click the "Complete" box in the bottom right.
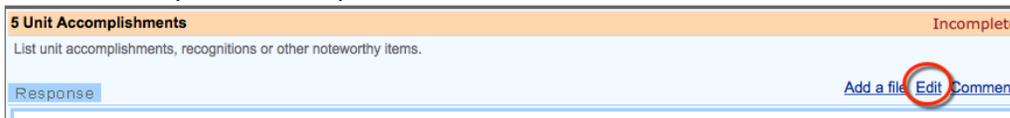   c. To Save this information, Click "OK" in the bottom left.

Section 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.

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

    6 Individual Faculty/Staff Honors and Accomplishments

2. Click Edit to open the composition window.

6 Individual Faculty/Staff Honors and Accomplishments	Incomplete
List and describe any unit faculty or staff accomplishments of any significance during this academic year. Include research, scholarship and service, as applicable.	
Response	Add a file Edit Comment

    a. Enter the Individual Faculty/Staff Honors and Accomplishments in the large text space.
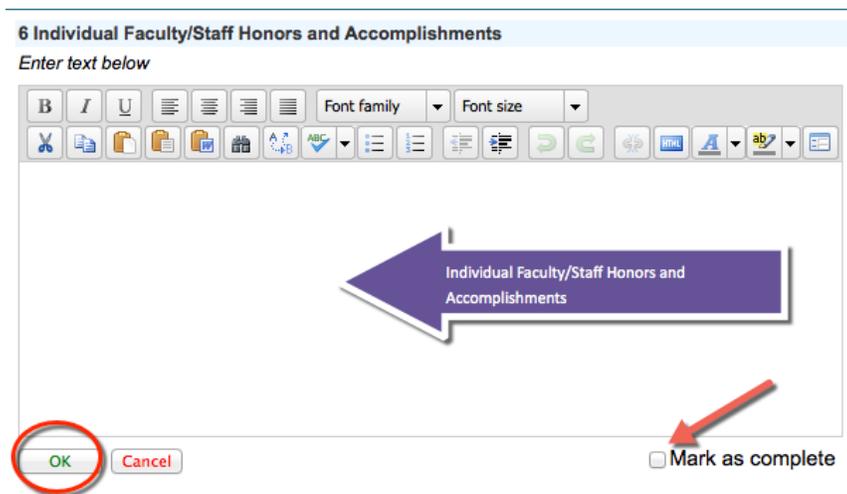
    b. Format/organize information as needed using the formatting tools (bold, bullet, etc.).
    c. After the information has been entered, Click the "Complete" box in the bottom right.
    d. To Save this information, Click "OK" in the bottom left.
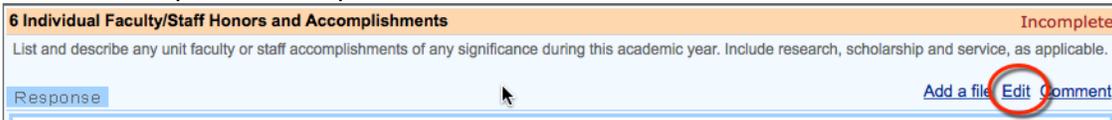
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Section 7: Contribution to the President's Annual Accomplishments Report

The President's Annual Accomplishments Report is a different document than the Annual Report generated through the process you have just completed, although the two documents have some common content. It 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 2014-2015 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 in Section 7 will be something already included in sections 4 through 6. *(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.

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

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

Section 8: Addenda

Attach files that should be included in the annual report.
- Statistical data
- Program information
- Program Review or APT reports

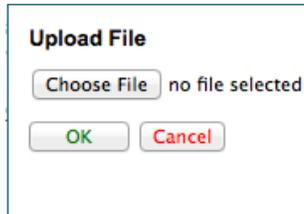*NOTE: Convert all files to .pdf before uploading to JMU-STAR.*

1. Click on the Addenda field.

8 Addenda
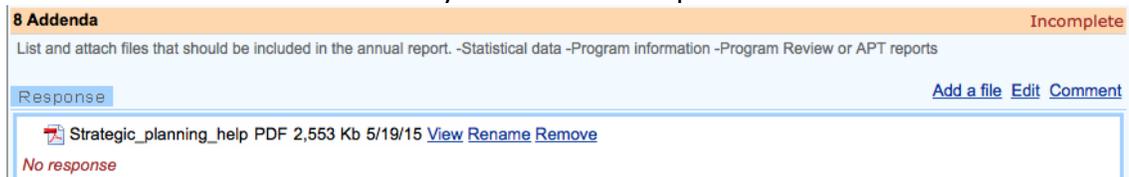
2. Click Add a file to open the upload tool.

8 Addenda	Incomplete
List and attach files that should be included in the annual report. -Statistical data -Program information -Program Review or APT reports	
Response	Add a file Edit Comment
No response	
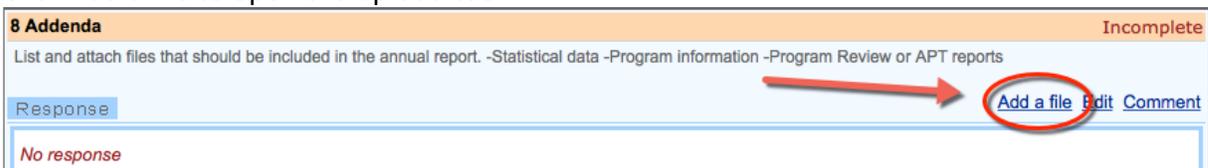
  a. Click Choose File to browse for the .pdf document you want to upload/append.

  Upload File

  Choose File   no file selected

  OK   Cancel

  b. Click OK to upload the file.
  The file name will be automatically added to the response box.

8 Addenda	Incomplete
List and attach files that should be included in the annual report. -Statistical data -Program information -Program Review or APT reports	
Response	Add a file Edit Comment
Strategic_planning_help PDF 2,553 Kb 5/19/15 View Rename Remove	
No response	

Submit

Create PDF documents of your annual report, the 2014-15 objectives and the 2015-16 objectives. If possible, combine these pdf files or send them to gracetm. I will combine them and return as one document for submission.

Help

If you have questions or need help with this annual reporting process, please contact:

Tina Grace, X86830, gracetm@jmu.edu
Cindy Chiarello, X85712, grovecg@jmu.edu