JMU-STAR Reporting Tool
User Guide
Create the Annual Report

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:

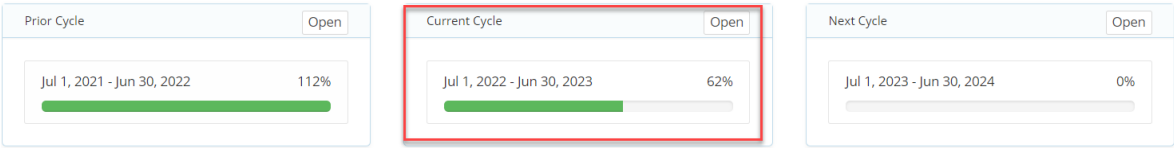
Verify Current Cycle Objectives Are Linked 1
Update Current Cycle Objectives 2
Review/Update/Enter Next Cycle Objectives 4
Enter Annual Report Information 4
Submit Annual Report 6

Verify Current Cycle Objectives Are Linked

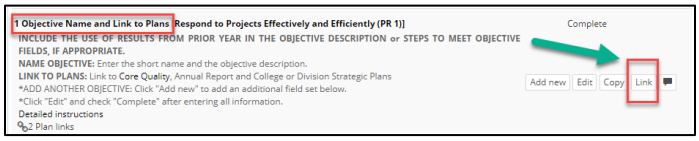
Verify your Current Cycle Objectives are linked to both your annual report and the JMU Strategic Plan 2020-2026.

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

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



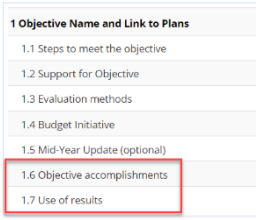
For each objective, you will link it to multiple items. Click on **Objective Name and Link to Plans** to open the dialogue box.



4. Click **Link** to show the plans this objective is linked to.
   a. If your objectives are already linked to BOTH JMU Strategic Plan 2020-2026 goals AND your Annual Report, skip to section ***Review/Update/Enter Next Cycle Objectives*** in this document.
   b. If your objectives are not linked to BOTH the JMU Strategic Plan 2020-2026 AND your Annual Report, follow instructions in ***Link Objectives*** in this document, then return here and continue.

Update Current Cycle Objectives

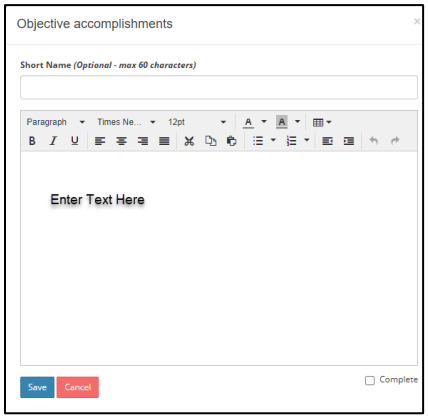
Update your Current Cycle objectives with accomplishments and how you will use results.



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

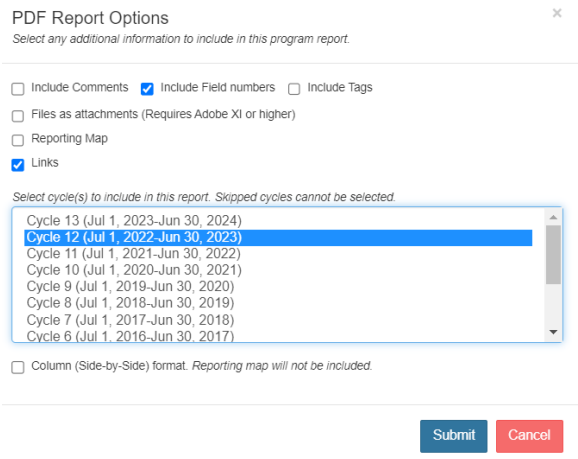
      Example - focus on improvement: Based on (findings, analysis), the (unit, office, department, program) will (enhance, enrich, further, advance) the (time, cost, quality, quantity) of (function, program, activity).

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

Create a PDF of the Current Objectives (Optional)

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

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



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

Review/Update/Enter Next Cycle Objectives

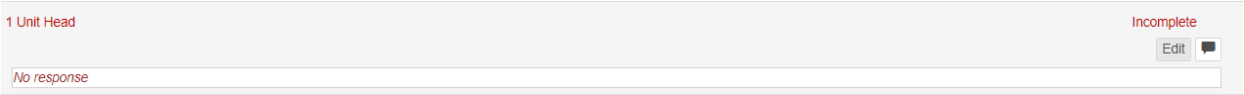
Prepare and finalize your objectives for next year.

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

14. Select your program to open the drop-down menu.
15. Choose the **Next Cycle**.
16. You may have entered some objectives with budget initiatives in January. You will see these here. Enter any remaining objectives now using instructions from the ***Create Objectives*** section in this document. Return here to continue.

Enter Annual Report Information

17. From the Welcome Page, click on **Plans**.
18. Click your unit name to create/edit the annual report.
19. Click on each field to expand it, then click **Edit**.



a. Note: not every field may be applicable to your unit.
b. Required fields: **Unit Head, Report Year, Unit Mission, Executive 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 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)

Fields and Responses

1 Unit Head
2 Report Year
3 Unit Mission
4 Executive Summary
5 Unit Accomplishments
- 5.1 Major Unit Accomplishments
- 5.2 Engagement
  - 5.2.1 Community Engagement
  - 5.2.2 Civic Engagement
  - 5.2.3 Engaged Learning
- 5.3 Inclusive Excellence
- 5.4 Programs or Services Rankings and Recognitions
  - 5.4.1 National or international rankings of programs/services
  - 5.4.2 Other national or international recognitions
  - 5.4.3 Other recognitions (university, state, etc)
- 5.5 Early Student Success
- 5.6 Efficiencies
- 5.7 Comprehensive Campaign
- 5.8 Other Noteworthy Accomplishments

6 Individual Faculty/Staff Honors and Accomplishments
- 6.1 National or International Rankings and Recognitions
  - 6.1.1 Positions of leadership in national or international organizations held by faculty/staff/students.
  - 6.1.2 National or international awards received by faculty/staff/students
  - 6.1.3 Other rankings and recognitions of faculty/staff/students
- 6.2 Scholarly and Service Accomplishments and Other Honors

7 Addenda

Create Annual Report PDF

From the Plans tab, you are able to create a PDF of your annual report that includes the objectives from the current and next academic years.

The annual report PDF combines:

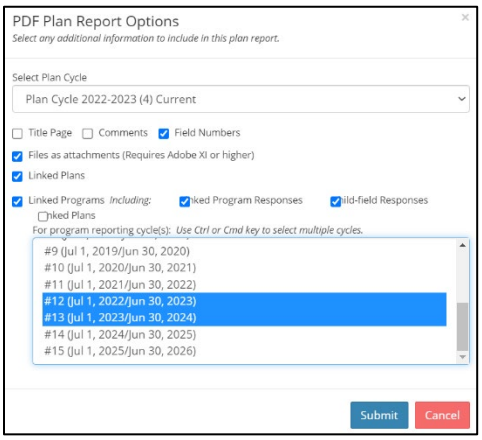
- Annual Report (from the Plans section of the JMU-STAR tool)
- Current Objectives (from the Programs section of the JMU-STAR tool, current year plan cycle)
- Upcoming Objectives (from the Programs section of the JMU-STAR tool, next year plan cycle)

*Note: the PDF will only include the objectives if you linked them (See **Link Objectives** in this document for instructions).*

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

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

Select:



- Plan Cycle Current (NOTE: this same process can be used to create previous years' reports, simply select the year for which you want a report)
- 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)

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

Submit Annual Report

Your Annual Report (one PDF document) 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 (e.g., email, JMU Network shared drive, etc.)