# Introduction to the Acuity STAR Interface

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**Target Audience:** Any Acuity STAR user

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Acuity STAR Introduction

# Goals For This Training

This self-study guide should provide an introduction to:

1. Understand where and how to access STAR
2. Be able to navigate around the STAR interface
3. Be able to enter in basic Faculty activities
4. Basic understanding of the All Activities View
5. Know how to access the various STAR Reports
6. Gain some valuable tips and tricks
7. Understand how to get help with STAR

This presentation material has additional information located in the 'notes' section of most slides.

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# What is STAR?

- STAR is an acronym for "Staff Tracking & Activity Reporting"

- Please download and install Mozilla FireFox as this offers the best experience  http://www.mozilla.org/en-US/
- FireFox is acceptable by all hospital IT departments

Disable pop-up blocker for STAR application
https://www.schulich.uwo.ca/star/
https://star.schulich.uwo.ca *application site

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Please take a minute to download and install FireFox.  This browser offers the best experience with STAR.  This recommendation is for both PC and Mac users.

**It is critical to disable the automatic pop-up blocker for STAR.**
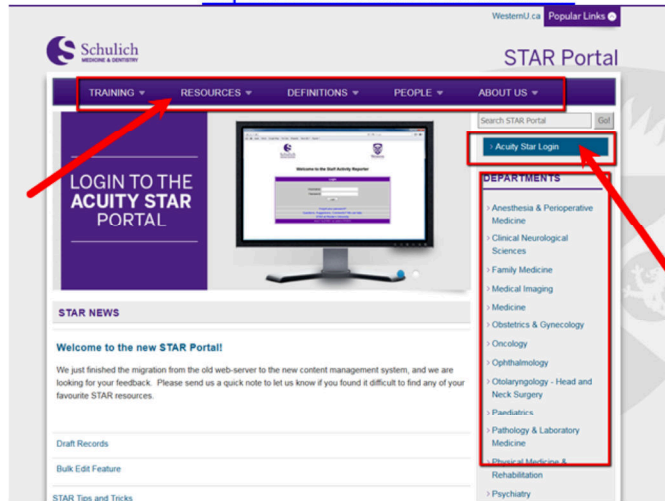
Your password has been set by your STAR Coordinator.  Please contact them if you have lost your password.

There are several useful links indicated by the arrow, here you can access Training, Resources, and the Contacts menu.

Clicking the Welcome to Staff Activity Reporter image will launch STAR.  You might want to bookmark this portal to quickly access STAR in the future.

Your password has been set by your STAR Coordinator. Please contact them if you have any problems logging on. Your star coordinator is listed in the Contacts tab from the main STAR portal.

The STAR at Western University link will take you to the Schulich Acuity STAR portal site where you can find training material, the training calendar and other Acuity STAR resources.

Section 1 is the left pane navigation, this is a dynamic menu, grouped by function.  Purple main topic menus will expand into sub-menus allowing you to drill into the detail item.

Section 2 is the right pane upper screen where you are presented the data grid menus.

Section 3 is the right pane lower screen where you are presented a data grid details.

Initially after logging on you should land on the Home Page. This has been set specifically for your department and contains important information from your STAR Coordinator.

Clicking on a purple menu choice will expand that menu item. The sub-menu items can be expanded or collapsed using the Plus or Minus (+/-) beside each menu item.
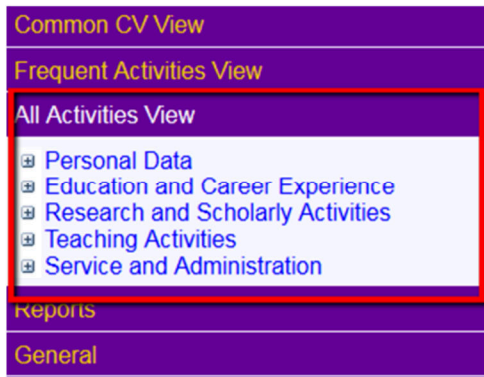
The All Activities View contains **all** the information you can enter in STAR. Use the (+/-) buttons to expand or collapse menu items. Clicking on a menu item will navigate to that data grid page on the right hand side of the screen.

Personal Data

Education and Career Experience

Research and Scholarly Activities

Teaching Activities

Service and Administration

Clicking on a menu item will cause the right panels of STAR to display the information data grid containing that data.  Each menu and data grid display is specific for that section of the CV.

Making a selection on the dynamic menu – left hand panel, controls what is displayed on the right hand panels.  Filtering, member selection and some data controls are located along the top (1), (3) and (5) while the main data grid has (2), (4) and (6).

1)  Action buttons – Refresh, Add New, To Excel, Import
    •   Refresh will re-query the data based on filter changes or on column changes (from Grid Columns)
    •   Add New – pop up data form
    •   To Excel – extracts visible data to Excel format for use outside of STAR.  Changes made in Excel data cannot be immediately imported back to STAR.
    •   Import – contact your STAR coordinator for help, but for Publications, Presentations and Teaching Effectiveness you do not need to manually enter in large amounts of data.
2)  Data Grid buttons – Edit, Clone, Delete, Confirm
3)  Date filter to reduce visible data – click refresh to redraw the screen.  STAR retains your settings so remember, later that date filters
4)  Column behaviour – click to sort ascending, again for descending.  Columns can be resized
5)  Grid Columns and Bulk Edit Options
6)  Scroll through data grid

## Pop-up Data Forms

Field Types:
- Text
- Date
- Dropdown
- Checkbox

Control buttons (bottom)
- Update
- Save
- Save/Clone
- Reset
- Cancel

Once a Add New or Edit or Clone button has been clicked the pop-up Data entry form appears for that menu item. EVERY STAR data entry screen is made up of fields. Fields are Drop-Downs, Check Boxes, Text fields OR Date Fields. In TEXT fields, you can the cut+paste function on your computer to quickly enter in some text.

Drop down menus can be context sensitive, meaning that a selection will determine the values that show up in subsequent drop down menus. This means you should always work top down from these screens.

The buttons along the bottom include Save, Save/Clone, Reset, and Cancel.

- Save will write your data to the database and close this pop-up data form.
- Save/Clone will write this data to the database and create a cloned 'new' record with the same values. This is useful when you have several similar records to enter. It does not close the pop-up data form.
- Reset will wipe out any changes you have made on the screen and reload the data from the database.
- Cancel will NOT write any information to the database and it DOES close the pop-up data form.

Data entry forms are specific to the CV section you are viewing from the Menu and the Data Grid screen.

* (asterisk) indicates a mandatory field.

Where possible, use the standard drop down menu values and avoid using the "Other – please specify" freeform text value.

Reports Menu

Typically three reports are used:

1) SSMD Professional CV
2) SSMD Promotion CV
3) SSMD Teaching Dossier

Each are generated from the Reports menu, select the report you want to generate and if required, the Person or Unit (if you manage multiple faculty members' data) and click Generate report.

Clicking the **Click here** will download the report in .rtf format.

If you are on a Mac computer, the Safari browser might not display .rft files properly (use Firefox…)
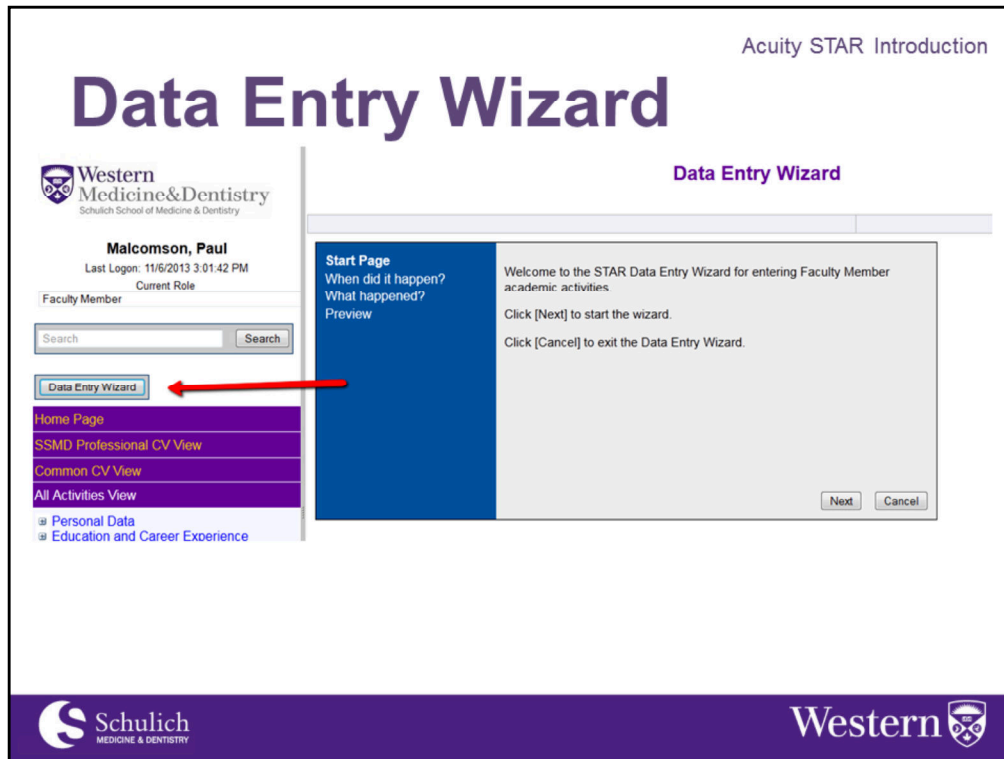
Data Entry Wizard

Located just below the Search bar is a Wizard that should allow you to quickly answer several key questions and have you navigate directly to the Data Entry Page with those answers populated.

Questions have been organized in a way that you can choose the Faculty Member (if you manage more than one person's data), choose the Activity date then answer some details about the activity.

The next page outlines the initial questions currently available

Once you answer the initial question, any subsequent Wizard screens are designed to gather specific information about the activity and when you press GO, the appropriate pop up data entry screen will appear where you can complete the entry and press save.
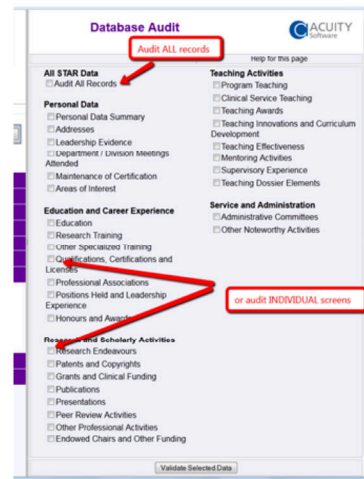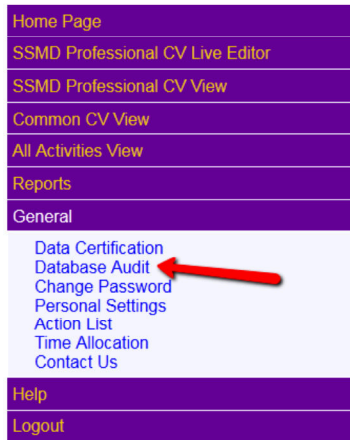
Used to identify any missing mandatory fields, quickly and efficiently.

NOTE: remember to SAVE the record after editing

# Tips & Tricks

If the Buttons disappear in the Data Grid:

- Check to see if the double scrollbars are offset on the right hand side of the browser

If you enter and save a record and do not see it in the data grid:

- Check to see if you have data filters set prohibiting you from seeing all data records.

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Hovering over the grey question mark should provide some simple instructions for you.

# Self Study Quiz

1. Where does activity **x** go in STAR?

2. What if I forget my username / password?

3. How can I change my password?

4. Who can see the data I put in STAR?

5. How can I register for instructor led training?

6. How do I create a SSMD Professional CV

7. Who do I ask to about questions I have?

8. Can I use cut and paste (Ctrl+C/Ctrl+V) in the STAR data entry screen?

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# Next Steps

<u>DO:</u>
Register for additional training
Ask questions of your STAR coordinator or STAR support team

Review the CV for quality and accuracy
*Use a set frequency (Monthly, Quarterly, etc) to update STAR data*
Compile activities offline to enter in 'batch mode'

Print the SSMD Professional CV to compare

Please prepare for Academic Promotions Cycle 6 Months in advance

<u>DO NOT:</u>
Continue to use 'old' original CV
Leave Academic Promotion updates to the last minute
Stop asking questions!

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# Goals For This Training

Have these goals been met?:

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