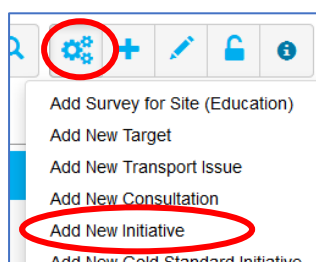


How to Add Initiatives in Modeshift STARS

Note, this user guide focuses on Initiatives (Actions) but the process is identical for adding Consultations and applies to all user and site types.

Planning a New Initiative

Select Add New Initiative using the 'perform process' (cogs) icon accessed via the 'Site' tab. Note: the other options on the dropdown may look different depending on site type.



Input Initiative Details

You do not have to distinguish between Travel and Supporting initiatives at this point; the system will do that for you. For the full list of initiatives see the initiatives lists for your site type accessible from the Guidance menu.

- Select **Type** from the picklist; this then generates a list to pick under **Action**.
- If appropriate, complete **Action Title** with your local name for the Action (the default action names are generic and high level). This is essential if you are selecting on of the 'other' options.
- Add the name of the **Person Responsible** – tip: spread the load; try not to make one person responsible for everything.

- Add **Target Date** (when you are planning to complete the initiative) using the calendar.

IMPORTANT NOTE: If the date displays in an American format this is not a fault with Modeshift STARS. STARS picks up the date format from your browser – you may need to set the default to English (United Kingdom)

- If you are adding the initiative as planned, complete the **Reporting** field with details of what you are planning to do. Once you have completed the initiative, update it with what was done/delivered. This should have enough detail to be easily understood by someone outside of your organisation/school.
- If you're planning several initiatives at once select **Yes** at 'Add another initiative?' to open another after saving.
- Click **Save**

You have now planned your initiative.

Completing an Initiative

You can do this at the same time as planning an initiative but usually the two steps are separate.

- Click on the **Travel Initiatives** or **Supporting Initiatives** tab depending on which you are updating.
- Click in the box next to the initiative you want to update and then the pencil icon.

Initiatives (Results 1-19 of 19) Page 1 of 1 - 1			
☐	Status	Type	Action
☐	Planned	Cycling	C12 - Bicycle Security Marking
☒	Planned	Cycling	C3 - Bikers breakfast
☐	Planned	Cycling	C5 - School takes part in Sustrans Big Walk & Wheel

- Fill in the **Completion Date** using the drop-down calendar
- Education Sites only: Complete the number of **Pupils Involved** and **Adults Involved**.
- Other Sites: Complete the number of **Adults Involved**.
- Complete the **Reporting** field with details of what you did to complete the initiative. This should contain enough detail to be understood by someone outside the organisation. Try to avoid acronyms.
- Change **Status** to completed. *Note – do this only when you are sure everything is correctly entered. Once status contains Completed all other fields, except evidence upload become read only*
- Upload evidence. Add a brief **description** of the evidence and then **Browse** for the file. It is best practice to add evidence to all initiatives.
- Click **Save**

If there is evidence attached, the initiative will be saved as 'Completed', if not it will be 'Completed – No Evidence'. This makes it easy to see which initiatives qualify only for Approved or Good Accreditation.

On Saving, you will be taken to a read only view of the full initiative. To return to your home view, click on the up arrow next to Site

