



SPOL – Entering Planning Objectives

*This guide will walk you through the steps to enter objectives, action plans, and resource requests for the upcoming year. If you are completing Program Review, these steps walk you through how to answer Program Review **Question 11**.*

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Entering Planning Objectives

The purpose of planning objectives is for programs and departments to ask for items **above and beyond** what one can pay for **in the year ahead** with annual budget allocation.

Planning objectives and resource requests can be made every year, even if your department or program is not going through program review in the current year.

1. Go to [the Cañada SPOL Login page](#)
 - a. Be sure to use Safari or Chrome to Access SPOL; do not use Firefox.



2. Login with your program or department SPOL credentials. This is not individual, each program has one SPOL account that everyone can access and some are shared between multiple programs or departments.
3. Once you login, you will first see your 'My SPOL' page. Click the Planning button to the left.



4. Click on 'View My Objectives'.

Welcome to the Planning Homepage

View My Objectives
View all of your current objectives, or search for a specific Objective and make your necessary updates

New Objective Wizard
Follow our easy to use, step-by-step wizard to creating a new Objective.

Approve My Objective
View all of your objective that require approval

View My Planning Units
View all of your current Planning Units, or search for a specific Planning Unit and make your necessary updates.

Search for Objectives
Search Objectives according to Planning Unit, Planning Year or Unit Manager.

Print a Report
Bring up the reporting interface to generate an informative report in minutes.

5. Choose the planning year from the drop down menu at the top right.

- a. Note: This is also where you can navigate back to your previous planning objectives if you need to see what you entered last year.

The screenshot shows a blue header bar with the text "Social Sciences Lead Faculty" and "Unit Lead - Canada College". Below the header is a yellow search bar containing the word "Search". Underneath the search bar is a dropdown menu labeled "Planning Year" with the option "2017-2018 (Current)" selected.

6. To add a new objective, click 'New Objective' at the top right corner.
 a. To edit or view an existing objective, click the drop down arrow to the left of the program and then double click on the objective you'd like to view.

My Objectives for Planning Year: 2017-2018

The screenshot displays a table titled "My Planning Units" with columns for "Planning Unit", "Planning Unit Manager", "Approval Status", and "View". The "Planning Unit" column lists Anthropology, Communication Studies, Economics, Geography, History, Philosophy, Political Sciences, and Psychology. The "Planning Unit Manager" column shows "Lead Faculty, Social Sciences" for all. The "Approval Status" column indicates "No Objectives" for most, except Psychology which has four objectives. The "View" column contains "View" links. Below this table is another table for "Objectives", with columns for "Objective ID", "Objective Title", "Approval Status", "DOC", and "LNK". One row is highlighted in yellow, showing Objective ID 701 and Objective Title "DRAFT - Improve pedagogical effectiveness through class teaching technology".

My Planning Units				New Objective
Planning Unit	Planning Unit Manager	Approval Status	View	
Anthropology	Lead Faculty, Social Sciences	No Objectives	View	
Communication Studies	Lead Faculty, Social Sciences	No Objectives	View	
Economics	Lead Faculty, Social Sciences	No Objectives	View	
Geography	Lead Faculty, Social Sciences	No Objectives	View	
History	Lead Faculty, Social Sciences	No Objectives	View	
Philosophy	Lead Faculty, Social Sciences	No Objectives	View	
Political Sciences	Lead Faculty, Social Sciences	No Objectives	View	
Psychology	Lead Faculty, Social Sciences		View	
Objective ID	Objective Title	Approval Status	DOC	LNK
701	DRAFT - Improve pedagogical effectiveness through class teaching technology			
Sociology	Lead Faculty, Social Sciences	No Objectives	View	

7. Enter your Objective Title, select your Planning Unit, Objective Purpose and Status. Enter a description of your objective and click Save.

Create a New Objective

The screenshot shows the "Create a New Objective" form. It includes fields for "Objective ID" (set to <NEW>), "Objective Title" (set to "Increase Enrollment"), and "ERP ID: Create On Save". Below these are dropdowns for "Planning Unit" (set to "21040 - Economics --- Lead Faculty, Social Sciences") and "Original Planning Year" (set to "2017-2018 (Current)"). There are radio buttons for "Multi-Year Objective" (set to "No"). Further down are dropdowns for "Objective Purpose" (set to "Program Improvement Plan") and "Objective Status" (set to "New Objective"). At the bottom is a rich text editor toolbar with buttons for Cut, Copy, Paste, Print, Spell Check, Font, and Paragraph. A sample objective description is provided in the editor: "SAMPLE OBJECTIVE - We want to host student events to increase interest and awareness of the program."

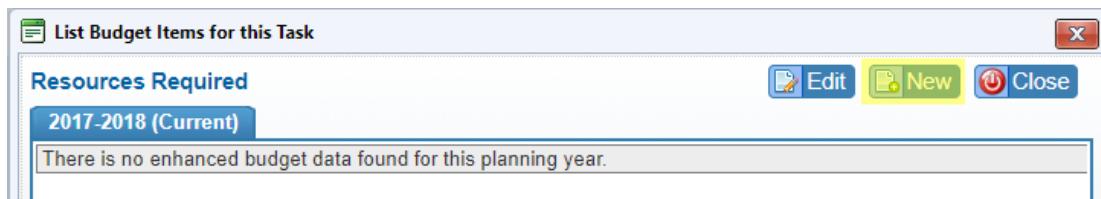
8. After clicking Save, you'll end up on the Objective Details page and there are at least two sections that you need to complete: 'Action Plans & Resources Required' and 'Associate to Program Review Standard'.

The screenshot shows the 'Objective Details' page for an objective titled 'Increase Enrollment'. The page includes sections for 'Action Plans & Resources Required', 'Associated to Program Review/Accreditation Standard', 'Document Management', 'Link Management', 'Planning Years', and 'Units Impacted'. Each section has its own set of buttons for Add, Edit, Remove, View, and other actions. A 'Draft' status indicator is visible in the top right corner.

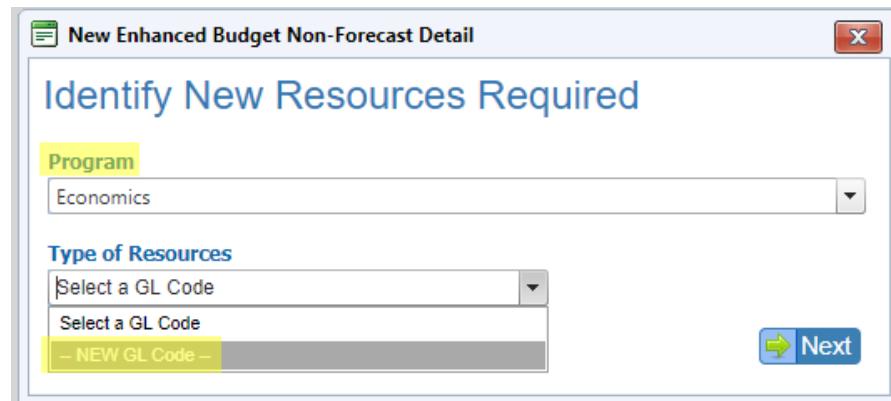
- Under 'Action Plans & Resources Required', click 'Add' and enter the type of plan, priority level, due date and status of your plan. Enter a description of your action plan and click Save.
- In that same window after saving your action plan, click on 'Resources Required' at the bottom left corner.

The screenshot shows the 'Action Plans & Resources Required' dialog box. It contains fields for Start Date (10/20/2017), Type (Resource Request), Priority Level (High), End Due (01/22/2018), Status (New), Order (1), and a budget of \$0. There is also a 'Describe the Action Plan:' text area containing the sample text: 'SAMPLE ACTION PLAN - Our first event, will be pizza tabling session at the start of the spring semester.' At the bottom, there are buttons for Add, Edit, Save, Delete, and Close.

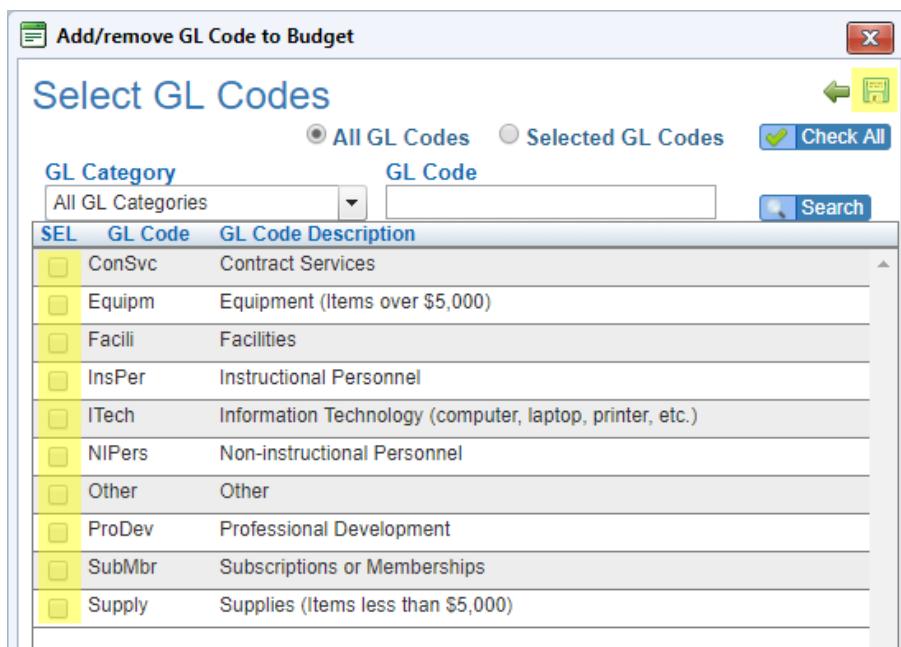
- c. Click 'New' at the top right corner.



- d. Find your program or department in the program drop down menu and from the 'Type of Resources' drop down menu, choose 'New GL Code' if you don't see a code that matches the items in your resource request.



- e. From there, choose the code that most closely matches the resource you're requesting. Click the disk icon at the top right. Once you return to the previous screen, choose the code you selected from the 'Type of Resources' drop down and click Next (see item 8d).



- f. Enter the priority level, item name, commodity type, tax, shipping, cost and description of your recourse request. Click 'Save' at the bottom right.

The screenshot shows a software interface titled 'New Enhanced Budget Non-Forecast Detail'. At the top, it displays 'Planning Year: 2017-2018', 'Resource Type: Supply - Supplies (Items less than \$5,000)', and 'Program: 21040 - Economics'. Below this, a section titled 'Action Plan:' contains a sample action plan: 'SAMPLE ACTION PLAN - Our first event, will be pizza tabling session at the start of the spring semester.' The 'Priority Level' is set to 'High' and the 'Item Name' is 'Pizza for 100 Students'. Under 'Commodity Type', 'New' is selected. For taxes and shipping, both 'Yes' radio buttons are selected. The 'Proposed' section shows 5 units at \$9 each, totaling \$45. The 'Approved' section has empty fields. A 'Description' box contains the text: 'SAMPLE RESOURCE REQUEST - We will purchase 5 pizza from Costco, which cost \$9 each.' At the bottom are buttons for 'Save' (highlighted), 'Delete', and 'Close'.

- g. If you need to enter another Resource Request for that same action plan, click New at the top right and repeat steps 8c-8f. Otherwise click 'Close' and the top right. And click 'Close' in the action plans window.

The screenshot shows a table titled 'List Budget Items for this Task' with a header 'Resources Required' and a date range '2017-2018 (Current)'. The table has columns: GL Code, Budget Account, Description, Amount, and Approved. One row is shown: Supply, Economics, Pizza for 100 Students, \$45.00, and \$0.00. Below the table is a justification text: 'JUSTIFICATION: SAMPLE RESOURCE REQUEST - We will purchase 5 pizza from Costco, which cost \$9 each.' At the top right of the window are buttons for 'Edit', 'New' (highlighted), and 'Close'.

GL Code	Budget Account	Description	Amount	Approved
Supply	Economics	Pizza for 100 Students	\$45.00	\$0.00

- h. Feel free to add more action plans and resource requests as needed.
i. Next, associate this objective with any program review narratives that you entered that can offer supporting evidence for your requests. Click 'Select' under 'Associate to Program Review Standard on the Objective Details page.

- j. Click on the drop down arrows to the left of the (1) program group, A or B, that your program belongs to, (2) your program name, and (3) the question section. Next, click the check box to the left of the program review standard you want to associate. Click the disk icon at the top right to save your selection.



9. When that objective is completed, be sure to select 'Approve Objective' from the drop down at the top right before moving on to add other objectives. Last, click the green arrow at the top right to return to the list of objectives. Repeat steps 6-8 for all of your objectives.

