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**.*

If you have questions about how to access and use SPOL, please contact Allison Hughes:

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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.

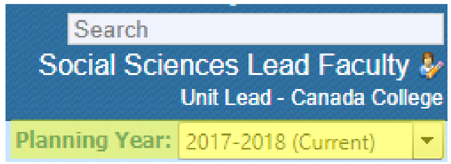
1. Go to the Cañada SPOL Login page
    a. Be sure to use Safari or Chrome to Access SPOL; do not use Firefox.

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'.

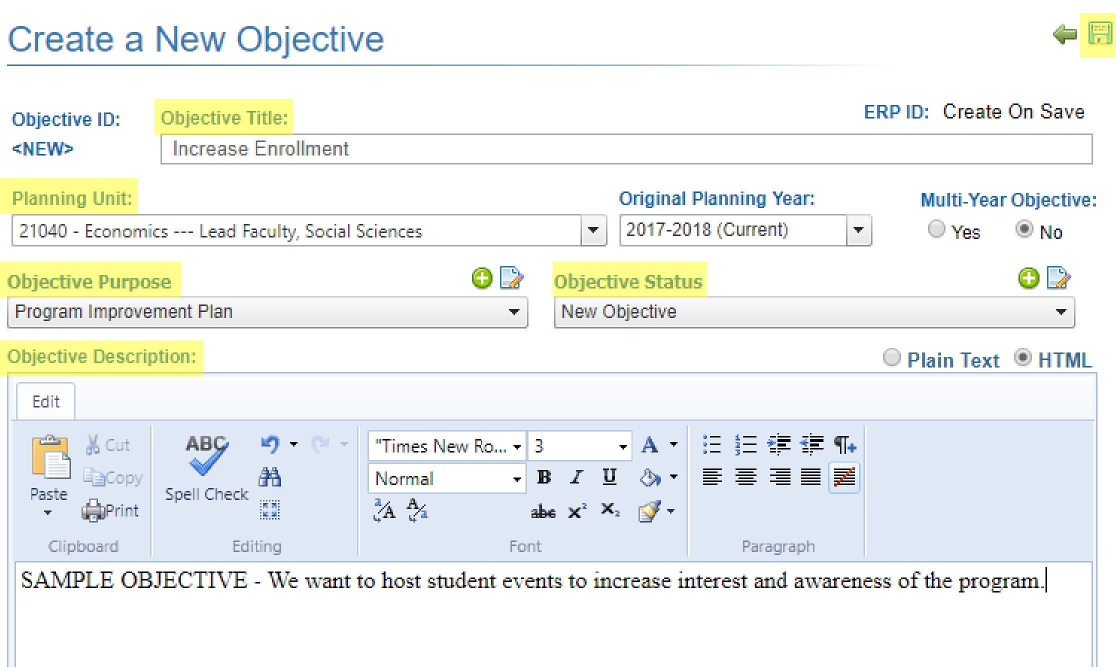
5. Choose the planning year from the drop down menu at the top right.

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.

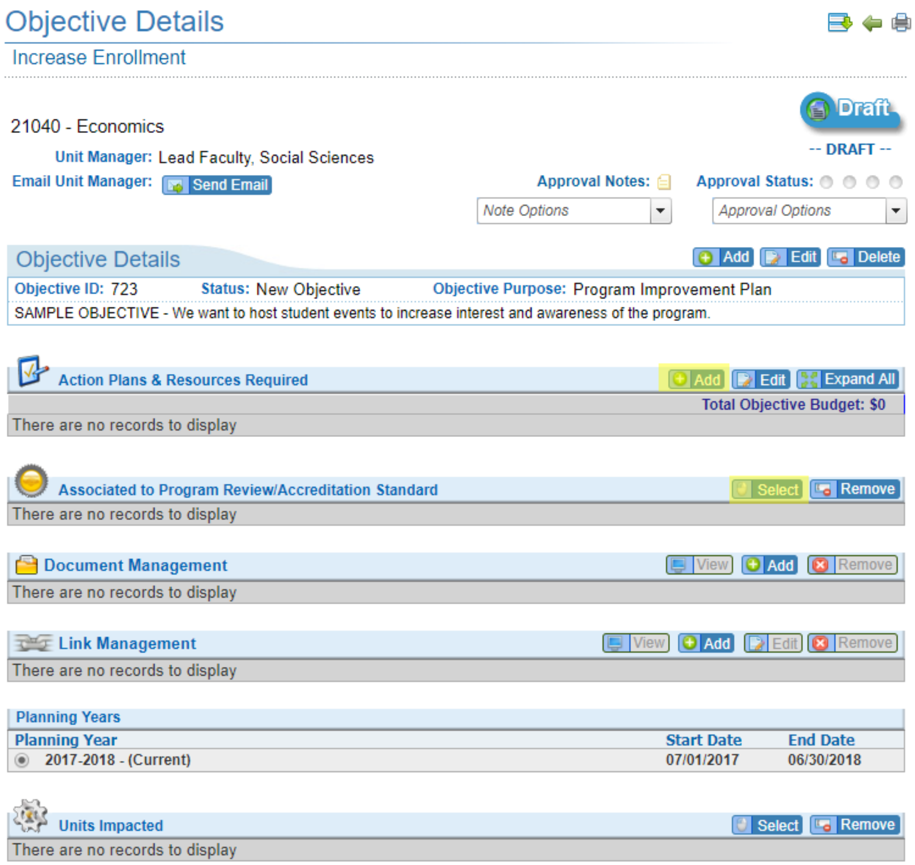


6. To add a new objective, click ‘New Objective’ at the top right corner.
   a. To edit or view an existing objective, click the drop down arrow to the left of the program and then double click on the objective you’d like to view.

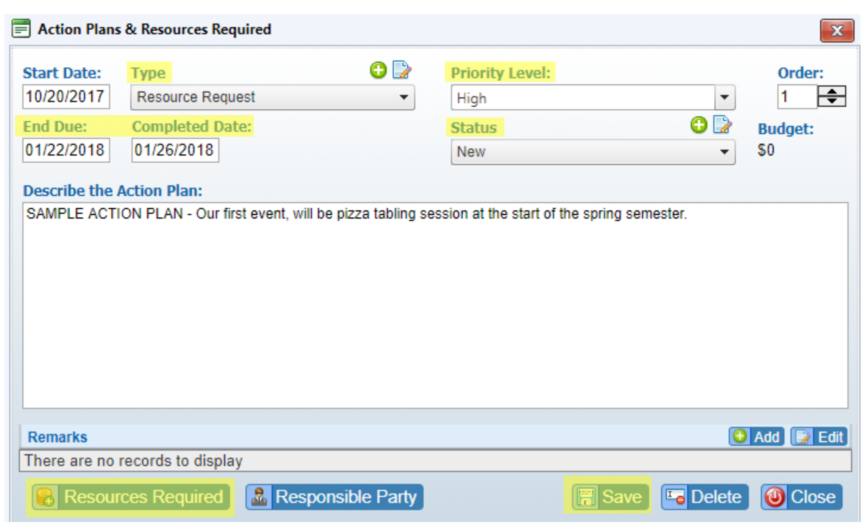
7. Enter your Objective Title, select your Planning Unit, Objective Purpose and Status. Enter a description of your objective and click Save.



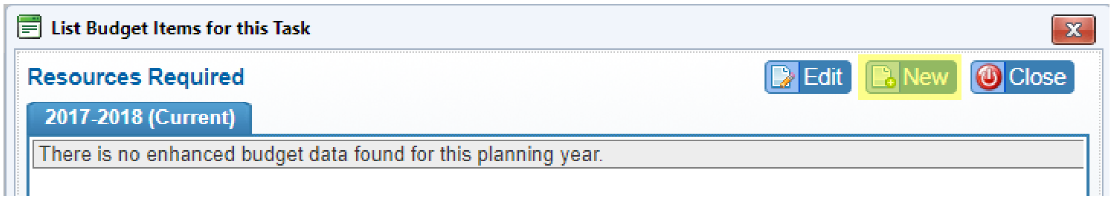
8. After clicking Save, you'll end up on the Objective Details page and there are at least two sections that you need to complete: 'Action Plans & Resources Required' and 'Associate to Program Review Standard.



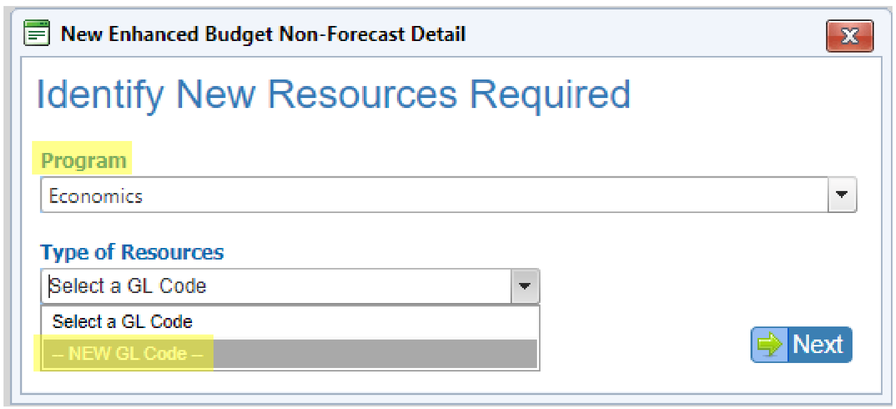
a. Under 'Action Plans & Resources Required', click 'Add' and enter the type of plan, priority level, due date and status of your plan. Enter a description of your action plan and click Save.
b. In that same window after saving your action plan, click on 'Resources Required' at the bottom left corner.



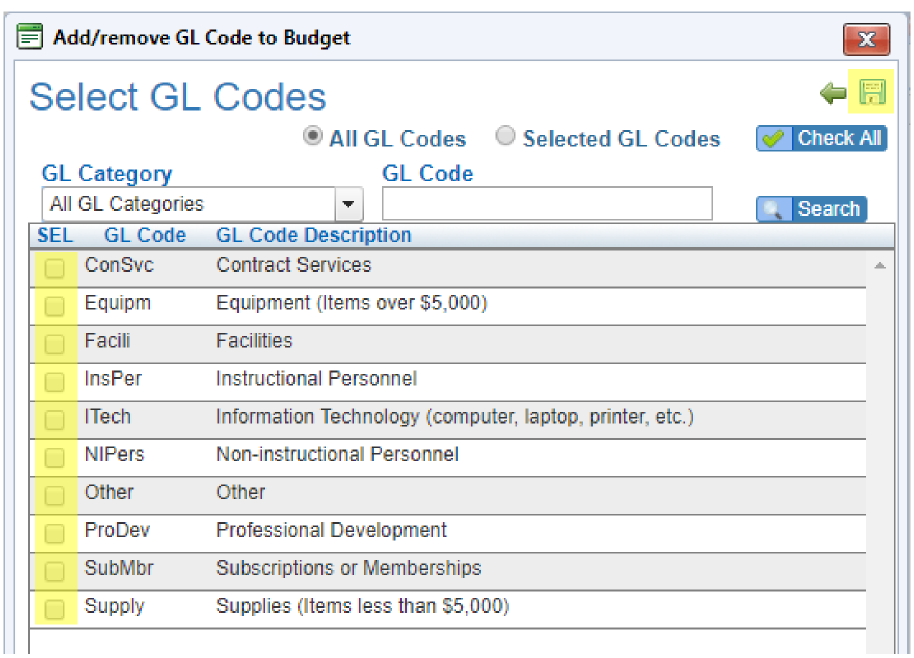
c. Click ‘New’ at the top right corner.



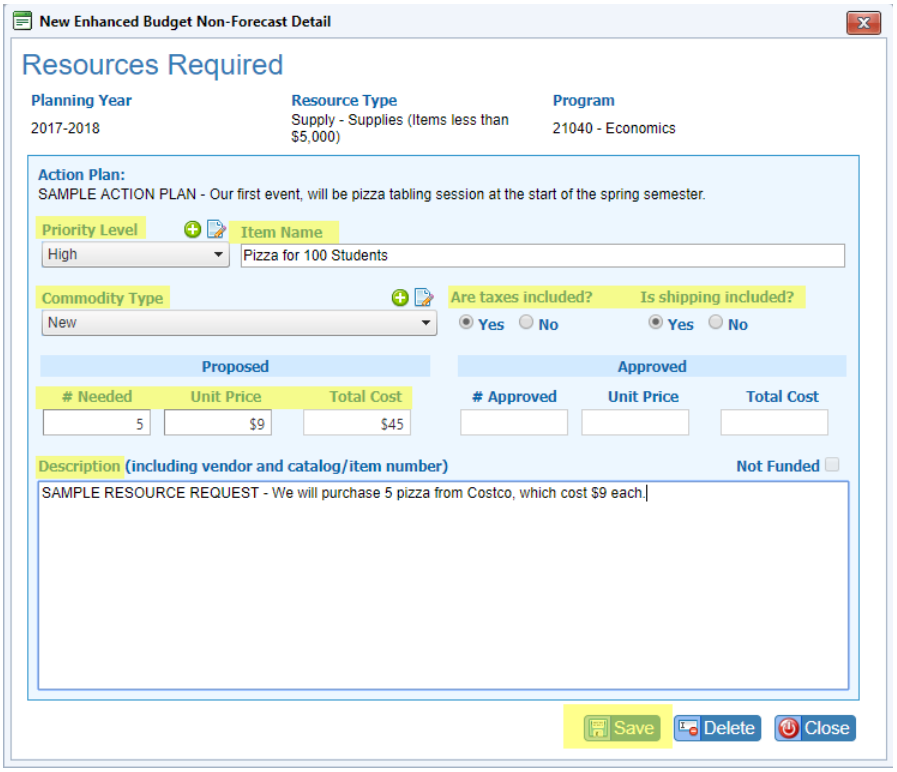
d. Find your program or department in the program drop down menu and from the ‘Type of Resources’ drop down menu, choose ‘New GL Code’ if you don’t see a code that matches the items in your resource request.



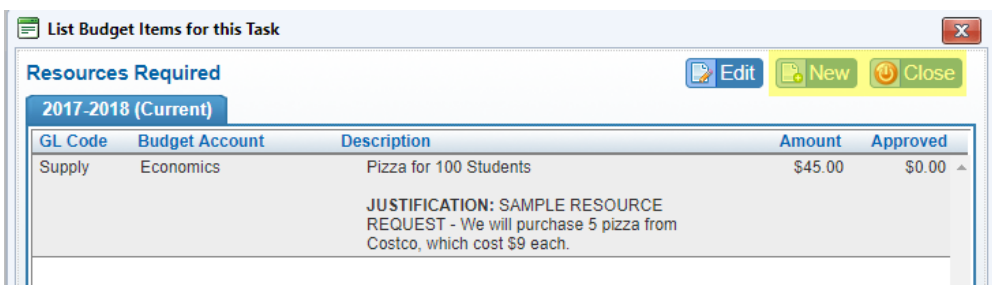
e. From there, choose the code that most closely matches the resource you’re requesting. Click the disk icon at the top right. Once you return to the previous screen, choose the code you selected from the ‘Type of Resources’ drop down and click Next (see item 8d).



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

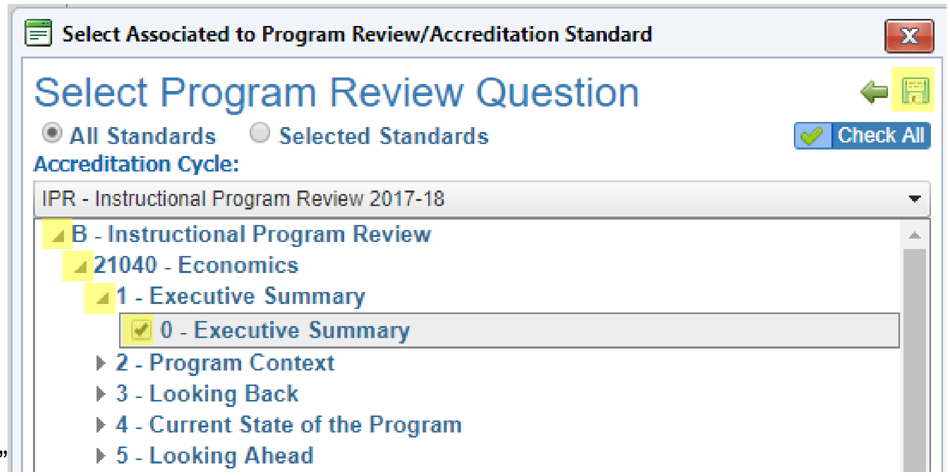


g. If you need to enter another Resource Request for that same action plan, click New at the top right and repeat steps 8c-8f. Otherwise click ‘Close’ and the top right. And click ‘Close’ in the action plans window.



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.



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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.