



# 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 on the left.



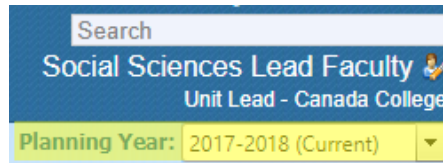
4. Click on 'View My Objectives'.

### Welcome to the Planning Homepage

<b>View My Objectives</b> View all of your current objectives, or search for a specific Objective and make your necessary updates	<b>Approve My Objective</b> View all of your objective that require approval	<b>Search for Objectives</b> Search Objectives according to Planning Unit, Planning Year or Unit Manager.
<b>New Objective Wizard</b> Follow our easy to use, step-by-step wizard to creating a new Objective.	<b>View My Planning Units</b> View all of your current Planning Units, or search for a specific Planning Unit and make your necessary updates.	<b>Print a Report</b> 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.



- 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

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	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	View										
<table border="1"> <thead> <tr> <th>Objective ID</th> <th>Objective Title</th> <th>Approval Status</th> <th>DOC</th> <th>LNK</th> </tr> </thead> <tbody> <tr> <td>701</td> <td>DRAFT - Improve pedagogical effectiveness through class teaching technology</td> <td><input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/></td> <td></td> <td></td> </tr> </tbody> </table>				Objective ID	Objective Title	Approval Status	DOC	LNK	701	DRAFT - Improve pedagogical effectiveness through class teaching technology	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>		
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701	DRAFT - Improve pedagogical effectiveness through class teaching technology	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>											
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

Objective ID: **<NEW>**    Objective Title:     ERP ID: Create On Save

Planning Unit:     Original Planning Year:     Multi-Year Objective:  Yes  No

Objective Purpose:     Objective Status:

Objective Description:  Plain Text  HTML

Edit

Clipboard: Paste, Print    Editing: Spell Check    Font: Times New Roman, 3, Normal, Bold, Italic, Underline    Paragraph: Bulleted List, Numbered List, Indent, Decrease Indent, Paragraph Styles

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'.

**Objective Details** 🔍 ↩️ 🖨️

Increase Enrollment

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21040 - Economics **Draft**

Unit Manager: Lead Faculty, Social Sciences -- DRAFT --

Email Unit Manager: [Send Email](#) Approval Notes:  Approval Status:

Note Options  Approval Options

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**Objective Details** + Add 📄 Edit 🗑️ Delete

Objective ID: 723 Status: New Objective Objective Purpose: Program Improvement Plan

SAMPLE OBJECTIVE - We want to host student events to increase interest and awareness of the program.

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**Action Plans & Resources Required** + Add 📄 Edit 🗑️ Expand All

Total Objective Budget: \$0

There are no records to display

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**Associated to Program Review/Accreditation Standard** 👤 Select 🗑️ Remove

There are no records to display

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**Document Management** 📄 View + Add 🗑️ Remove

There are no records to display

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**Link Management** 📄 View + Add 📄 Edit 🗑️ Remove

There are no records to display

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**Planning Years**

Planning Year	Start Date	End Date
2017-2018 - (Current)	07/01/2017	06/30/2018

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**Units Impacted** 👤 Select 🗑️ Remove

There are no records to display

- 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.

**Action Plans & Resources Required** 🗑️

Start Date: 10/20/2017 Type: Resource Request Priority Level: High Order: 1

End Due: 01/22/2018 Completed Date: 01/26/2018 Status: New Budget: \$0

**Describe the Action Plan:**

SAMPLE ACTION PLAN - Our first event, will be pizza tabling session at the start of the spring semester.

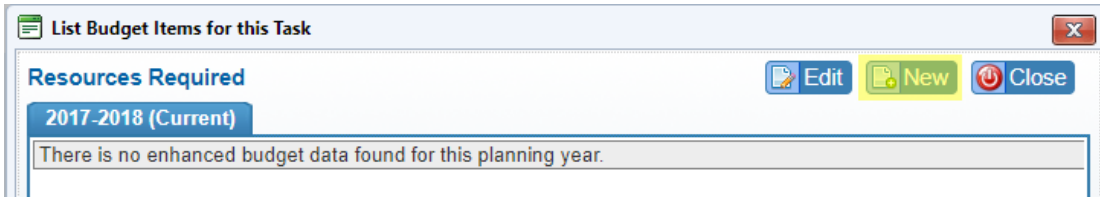
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**Remarks** + Add 📄 Edit

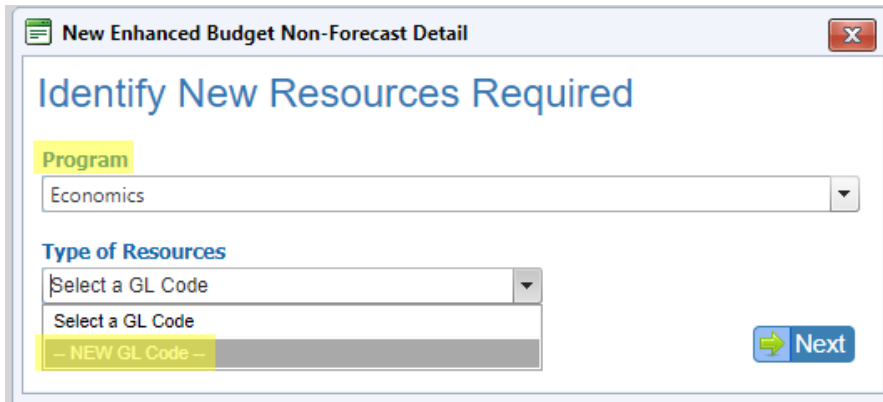
There are no records to display

[Resources Required](#) [Responsible Party](#) [Save](#) [Delete](#) [Close](#)

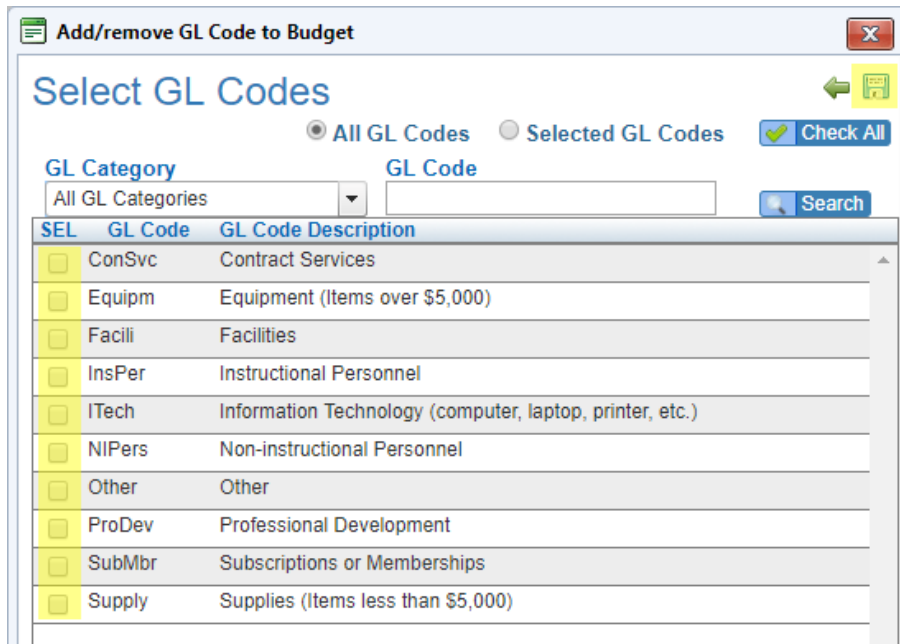
- c. Click 'New' at the top right corner.



- 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.

**New Enhanced Budget Non-Forecast Detail**

**Resources Required**

Planning Year: 2017-2018  
Resource Type: Supply - Supplies (Items less than \$5,000)  
Program: 21040 - Economics

**Action Plan:**  
SAMPLE ACTION PLAN - Our first event, will be pizza tabling session at the start of the spring semester.

Priority Level: High  
Item Name: Pizza for 100 Students

Commodity Type: New  
Are taxes included?  Yes  No  
Is shipping included?  Yes  No

Proposed			Approved		
# Needed	Unit Price	Total Cost	# Approved	Unit Price	Total Cost
5	\$9	\$45			

Description (including vendor and catalog/item number):  
SAMPLE RESOURCE REQUEST - We will purchase 5 pizza from Costco, which cost \$9 each |

Not Funded

Save Delete 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.

**List Budget Items for this Task**

**Resources Required** Edit New Close

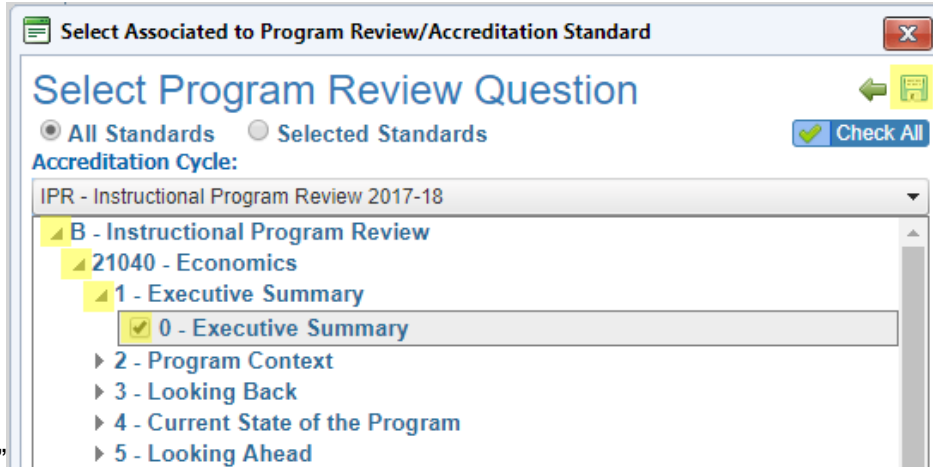
2017-2018 (Current)

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

JUSTIFICATION: SAMPLE RESOURCE REQUEST - We will purchase 5 pizza from Costco, which cost \$9 each.

- 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.

