

PVCC - SPOL SYSTEM

Table of Contents

1. Log into the PVCC- SPOL system Page 2

2. Copy ACTION PLAN(S) from PRIOR YEAR to CURRENT YEAR in SPOL system Page 3

3. View and edit AN ACTION PLAN(S) in the SPOL system Page 4

4. Edit a BUDGET REQUEST in the SPOL system..... Page 9-11

5. Create a NEW BUDGET REQUEST in the SPOL system Page 12



6. Delete a BUDGET REQUEST in the SPOL system Page 17

7. Run BUDGET REQUEST REPORT in the SPOL system Page 19

LOG INTO THE SPOL SYSTEM

1. Website: <https://pvcc.strategicplanningonline.com/>
2. Username and Password is the same as PVCC email's user name and password

https://pvcc.strategicplanningonline.com/login

 **DIAMOND™**
POWERED BY  **SPOL**

Welcome!

Username
NGUBA87551

Password


☐ Remember My Login

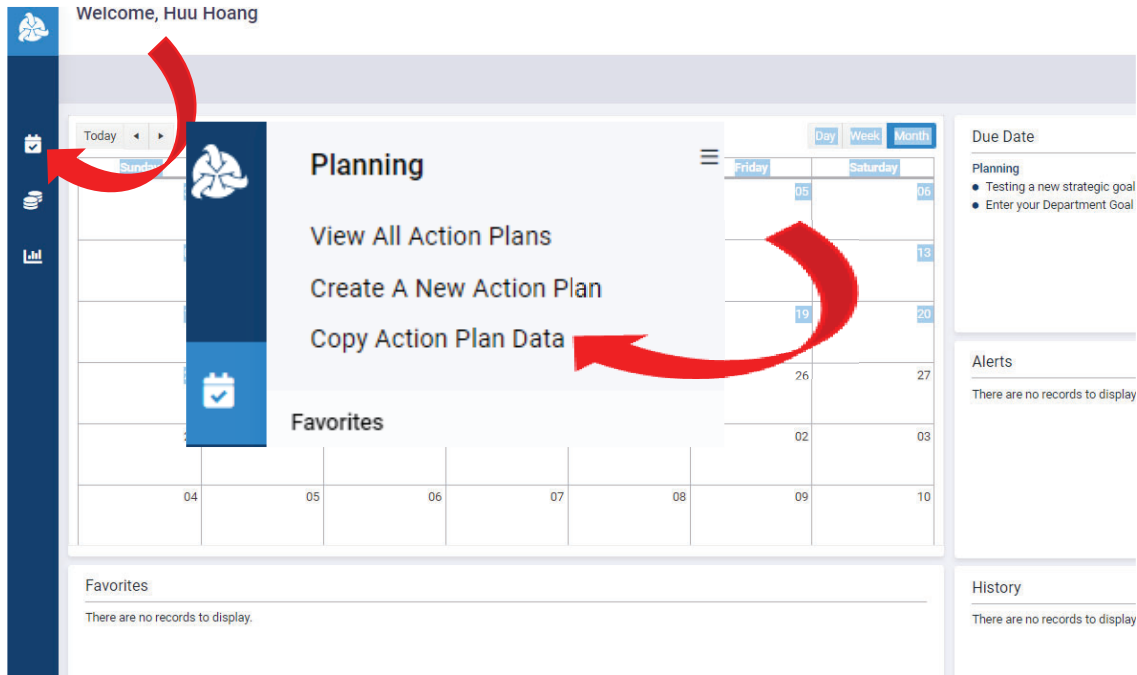
[Forgot Password](#) [Login](#)

v5.0.2.9

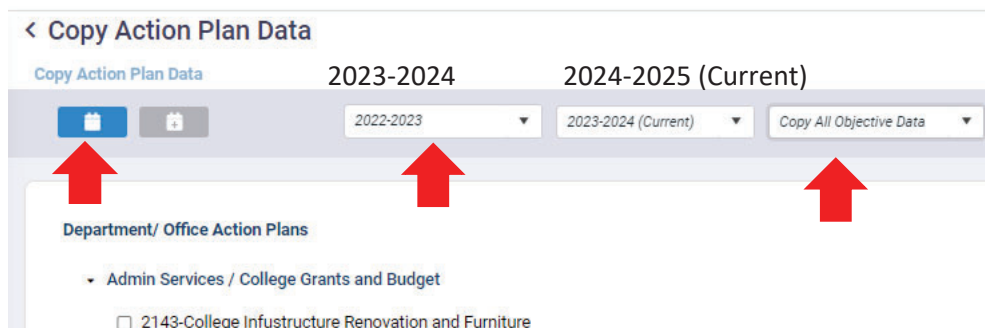
© Copyright 2021 Strategic Planning Online LLC


COPY ACTION PLAN(S) from PRIOR YEAR to CURRENT YEAR in SPOL SYSTEM

1. Click the Planning Icon to select Planning 
2. Select "Copy Action Plan Data" on the drop-down menu.




3. Copy Action Plan Data Window is Appeared on the Screen.
 - a. Select single year icon, and
 - b. Select the Fiscal Year that you want to copy the data, then
 - c. Select "Copy All Objective Data" as following

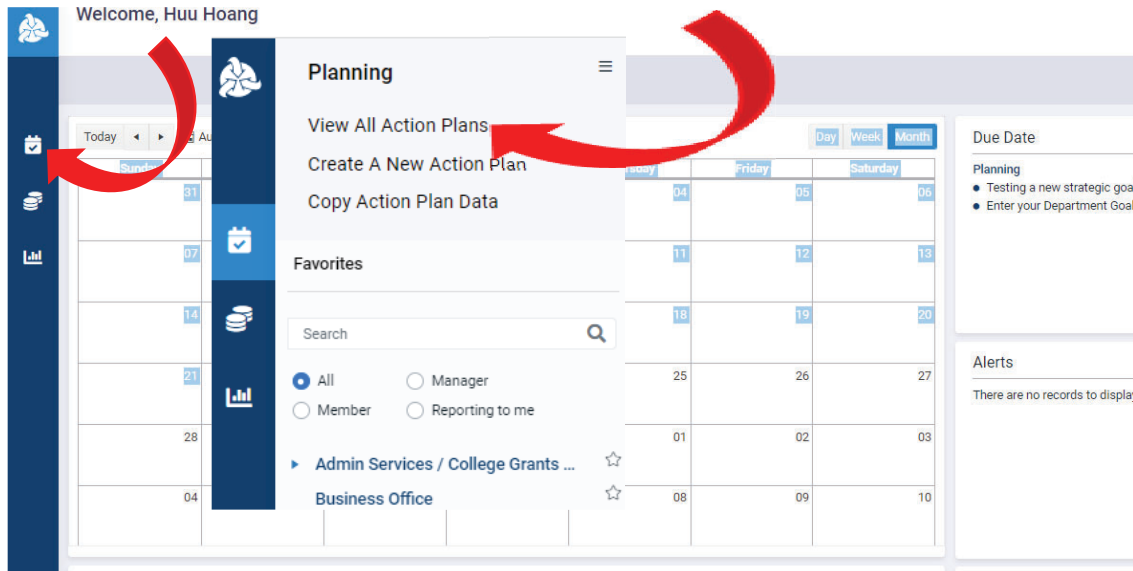


- d. Select or Click "Add Year" icon  to copy all data from the selected action plan(s).
4. After successfully coping our action plan, you need to review the copied action plan and modify them according:
 - a. With a new Department Strategic Priority/Goal
 - b. New Dates and Strategy for your action plan
 - c. Budget Request for this Action Plan.

You can review these steps in the next page "View and Edit an Action Plan"

VIEW and EDIT AN ACTION PLAN(S) in the SPOL SYSTEM

1. Click the Planning Icon to select Planning 
2. Select “View All Action Plans” on the drop-down menu.



3. Select an Action Plan and Click on the Action Plan Title to view and modify it.
4. Click on the “Planning Unit” Window to open the Department Goal Description Details and modify it.

3162 - Compliance with District HCM Position Control Requirement and Financial Effectiveness**Planning Unit**

30100 - Admin Services / College Grants and Budget

Planning Status

2 - In Progress

Planning Purpose

01. Operational Goal

Department Goal Description (Details)

With the new upgrade of the HCM system and changes of FMS and its business process District-wide, it requires each college must have personnel staff and faculty members, all temp.employees, college work-study employees, adjunct faculty members, and other special services contracts). The District a personnel and benefit expenses bi-weekly basic. Increase the college budget transactions process and financial operational efficiency and transparency plan is applied to help PVCC in maintaining solid financial data, reports and plans with more accurate and more financial transparency for PVCC with cu

5. The following “Department Goal Details Opened for you to modify then “save” it.

Department Goal Details
...
×

Department Goal Title

Compliance with District HCM Position Control Requirement and Financial Effectiveness

Planning Unit:

Admin Services / College Grants and Budget

Planning Year:

2023-2024

Multiyear (Unused)

Planning Purpose

01. Operational Goal

Planning Status

2 - In Progress

Department Goal Description (Details)

B
I
U

Paragraph

With the new upgrade of the HCM system and changes of FMS and its business process District-wide, it requires each college must have personnel staff to perform the duties to

VIEW and EDIT AN ACTION PLAN(S) in the SPOL SYSTEM (Continues)

6. Select an Institutional Priority/Goals for this Action Plan by Click on this following area.

Institutional Priorities/Goals (Select Only One Primary Priority)

There are no records to display.

7. Select the Primary Institutional Priorities (Select only one best fits to your Action Plan)
- If the Action Plans does not relate to the College Strategic Priorities then select “01.0 Department Operational Goals”, and Select “OPERATIONAL” for Department Operational Goals.

Institutional Priorities (Select One) ✕

Select Category

01.0 Department Operational Goals ▼

Pri	Sel	Goal Number	Institutional Goal Title
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	OPERATIONAL	Department Operational Goals

Cancel Save

- If the Action Plan relates to College Strategic Goals and Priorities then select “02.0 College Strategic Goals and Priority, and Select ONLY one of the PRIORITIES as your Primary Priority/Goal.

Institutional Priorities (Select One) ✕

Select Category

02.0 College Strategic Goals and Priorities ▼

Pri	Sel	Goal Number	Institutional Goal Title
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	PRIORITY #1	ENSURE HIGH LEVELS OF STUDENT SUCCESS WITH EQUITY, AND AN EXCELLENT EXPERIENCE FOR STUDENTS
<input type="radio"/>	<input type="checkbox"/>	PRIORITY #2	CULTIVATE A SUSTAINABLE COMPETITIVE ADVANTAGE BY MEETING THE NEEDS OF BUSINESS AND INDUSTRY AND THROUGH EFFECTIVE ENROLLMENT MANAGEMENT
<input type="radio"/>	<input type="checkbox"/>	PRIORITY #3	ENSURE PVCC IS RECONGNIZED AS A GREAT PLACE TO WORK AND ACHIEVE ORGANIZATIONAL AND OPERATIONAL EFFECTIVENESS

Cancel Save

- Select “Save” Icon.

8. Edit Information for Department Action Plan Strategies in order to execute and archive Your **Copied Action Plan**
- Click on Department Action Plan Strategy window to open and edit the Strategy Details for that Action Plan form.

VIEW and EDIT AN ACTION PLAN(S) in the SPOL SYSTEM (Continues)

Department Action Plan Strategy (How/When Will You Execute Your Plan)

☰ Justification detail information how and when you will start and complete your plan your action plan.

Start Date	Due Date	Funding Type	Priority	Planning Status
07/01/2023		Departmental	Select This for You Action Plan	2 - In Progress

b. The Strategy Details Opened for edit as following.

Strategy Details ... X

[Strategy Details](#) [Remarks](#) [Budget](#) [Assignments](#)

Start Date: 7/1/2023 Due Date: 6/day/2024

Strategy Type: Departmental Priority Level: Select This for You Action Plan

Strategy Status: 2 - In Progress Completed Date: 6/30/2024

Action Plan Description and Justification

B I U Paragraph

Justification detail information how and when you will start and complete your plan your action plan.

Cancel Save

c. Select "Save" icon to save the information.
- After select "Save" icon.

9. View Your Budget Request Information.

a. After you save the Action Plan Strategies, you would see the following window that include budget information that you copied from prior year. Now you need to modify the Budget Request.

[View All Action Plans](#) > [Goal Details](#)

INFO RESULTS ASSOCIATIONS ATTACHMENTS HISTORY

Dept Action Plan Strategies

☰ It requires each college have an accounting assistant to perform that duties to review and make changes for more than 1,200 RPS's and contracts each year and review more than 5,000 payroll line items to identify errors for corrections in the HCM. Process more than 10,000 financial transactions. This action plan also support the continuous mission of our college finance and budget with more financial efficiency, corrective, and transparency (from 90% or 100%) with the current challenge of the financial system. Providing more financial and budget training, report tools; and working on college-wide employees' feedback and expectations about college budget and finance. Increase from 98% (in 2022) to 100% or 100% strategic financial support to meet the needs and expectation from college employees.

2 - In Progress 06/30/2022

Start Date	Due Date	Funding Type	Priority	Planning Status	Budget Request	Approved
07/01/2021	07/01/2021	Departmental	0.1 Action Plan	2 - In Progress	\$132,500.00	\$0.00

Note: you have not modified the strategy of your Action Plan form, you can modify it as following.

- Start Date: Change the date into 7/1/2023
- Due Date: Change the date into 6/30/2024 or your specific due date
- Strategy Type: Departmental
- Priority Level: Use 0.1 Action Plan (This is not a budget Priority)
- Strategy Status: Select the status accordingly to your budget request.
- Completed Date: 6/30/24 or your expected date.
- Update your Action Plan Description and Justification.

- Budget Information Opened as following then Click “Details”



Strategy Details ×

[Strategy Details](#) [Remarks](#) [Budget](#) [Assignments](#)

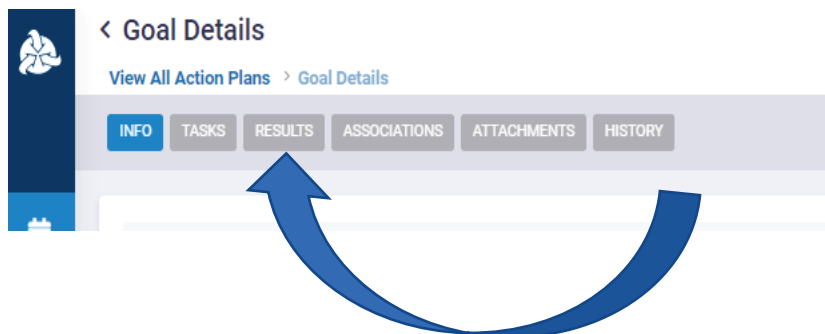
2023-2024 ▼ +

Account:	110-PVMAINCA-802570_INST_SPP - Special Project		
Account Number	51310 - Part-Time Wages		
Priority:	2.1 - Minimum Services Levels		
Description:	Renew OYO Fiscal Assistant Staff for HCM Control and Financial Effectiveness		

	Qty:	CPU:	Total:
Requested Values:	1	\$40,000.00	\$40,000.00
Approved Values:	0	\$0.00	\$0.00

Details

1. Edit Your Expected Results for Your Action Plan by Selecting “RESULTS” on the TOP MENU of the SPOL system, Right Under the “Goal Details” Title.



< Goal Details

[View All Action Plans](#) > [Goal Details](#)

[INFO](#) [TASKS](#) [RESULTS](#) [ASSOCIATIONS](#) [ATTACHMENTS](#) [HISTORY](#)

- You should see the following RESULTS window then Click on “Expected Outcomes” window in order to edit the expected outcomes information.

< Action Plan Details

[View All Action Plans](#) > 3384-DRAFT - Funding continuity for Fisc...

ACTION PLAN INFORMATION **RESULTS** ACTION PLAN STRATEGY ATTACHMENTS HISTORY

Expected Outcomes of Your Action Plan ⓘ

06/20/2025 -The SBS unit will be able to provide adequate customer service in support to o
-Fiscal Analyst Sr will be able to perform his job scope without having to find tir
-Fiscal Technician Sr. will be able to perform her job scope without having to su

Assessment Measures

08/28/2023 How can you measures the outcomes.

End of Year Outcome Report

08/28/2023 Testing how you can report the outcomes in September or October.
How successful result of your plan?
What are challenges?

Expected Outcomes of Your Action Plan ... X

Date: 6/20/2025 Planning Year: 2024-2025 - (Current)

Expected Outcomes Details


B I U Paragraph

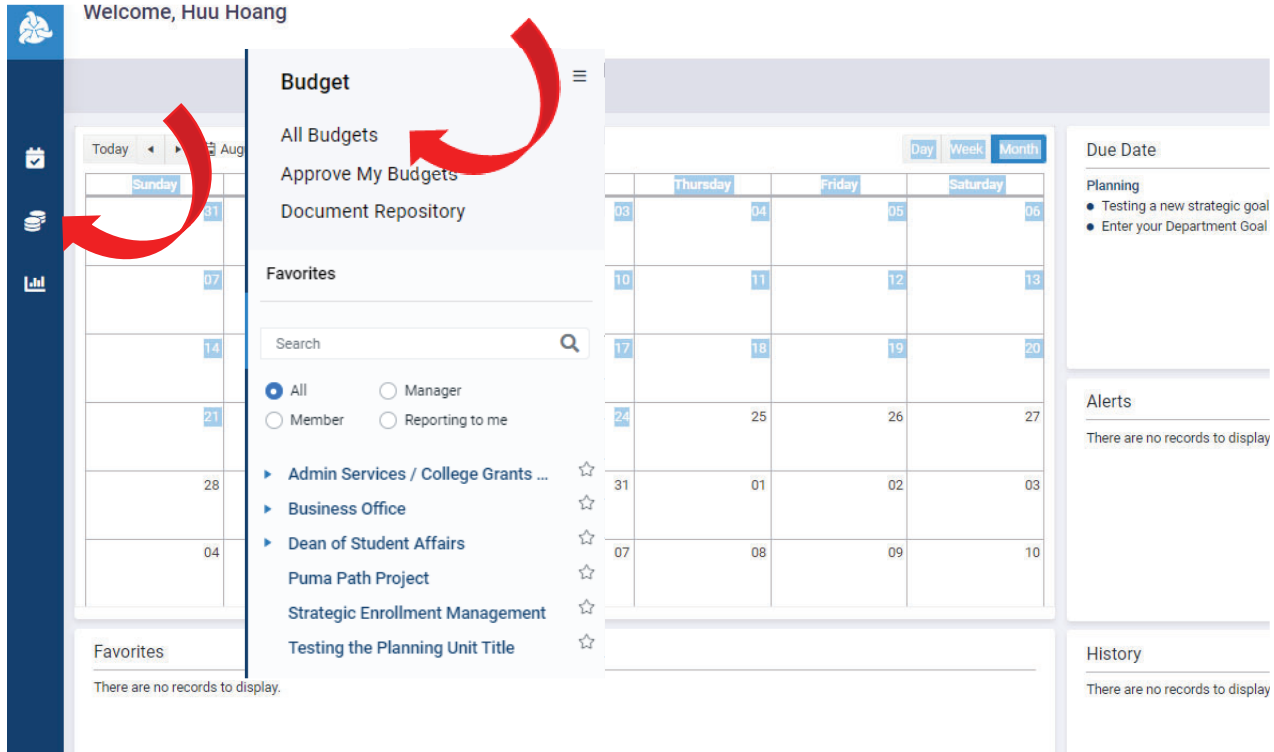
-The SBS unit will be able to provide adequate customer service in support to our students and internal customers and will have an additional help to support students.

Cancel Save

- After select “Save” icon, you should be able to see your entered information and this is the last step to edit completely your Department/Office Action Plan. However, **YOU MUST EDIT YOUR BUDGET REQUEST(s) that YOU COPIED.** Next session will show you how to edit a budget request in SPOL.

EDIT A BUDGET REQUEST in the SPOL SYSTEM

1. Click the Budget Icon to select Budget  in the SPOL.



Welcome, Huu Hoang

Budget

- All Budgets
- Approve My Budgets
- Document Repository

Favorites

Search

☒ All ☐ Manager ☐ Member ☐ Reporting to me

- Admin Services / College Grants ...
- Business Office
- Dean of Student Affairs
- Puma Path Project
- Strategic Enrollment Management
- Testing the Planning Unit Title

Due Date

Planning

- Testing a new strategic goal
- Enter your Department Goal

Alerts

There are no records to display

History

There are no records to display

2. Select "All Budgets" in order to view all Department Accounts with your budget requests for FY2024-2025 as following

All Budget By Unit Manager -

2024-2025 (Current)

All Budget

Unit Manager: All Departments or Units Collapse All

Accounts	Approval	% Change	\$ Change	Total Requested	Total Approved
Huang, Huu					
110-PVMAINCA-801835_INST_SPP - Business Office	**	0%	\$0	\$0	\$0
110-PVMAINCA-801990 - Fiscal and Cashier	**	0%	\$0	\$43,506	\$0
110-PVMAINCA-802005 - Receiving	**	0%	\$0	\$0	\$0
110-PVMAINCA-802570 - Puma Pathway Project Fund	**	0%	\$0	\$0	\$0
110-PVMAINCA-802570_INST_SPP - Special Project	**	0%	\$0	\$0	\$0
110-PVMAINCA-802570_INST_SPP - Fac Serv/Word Proc	**	0%	\$0	\$0	\$0
230-PVMAINCA-801835_INST_SPP - Business Office	**	0%	\$0	\$0	\$0
230-PVMAINCA-801880_INST_SPP - Rental Of Facilities	**	0%	\$0	\$0	\$0
230-PVMAINCA-802070_INST_SPP - Special Projects	**	0%	\$0	\$0	\$0
710-PVMAINCA-802400_INST_SPP - College Capital Allocation	**	0%	\$0	\$0	\$0
Miller, Jennifer					
110-PVMAINCA-801745_STOANT_SV - Dean Of Student Affairs	**	0%	\$0	\$0	\$0

EDIT A BUDGET REQUEST in the SPOL SYSTEM (Continues)

3. Select or Click on the Account Information to open the Department Account with its request budget information.

The screenshot shows the 'ACCOUNT' tab selected. The header indicates '30200 - Business Office 110-PVMAINCA-801990'. Below this, it shows 'Unit Manager: Hoang, Phu' and 'Fiscal and Cashier 110-PVMAINCA-801990'. A table displays budget data for various years and categories.

Account Number	2022-2023 Expenditures	2023-2024 Initial	2023-2024 Modified	2023-2024 YTD Obligations	2024-2025 Proposed	2024-2025 % Change	2024-2025 NEW BUDGET REQUEST	2024-2025 Total	2024-2025 Approved
51230	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,806.00	\$43,806.00	\$0.00
51310	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00
Personnel Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,806.00	\$43,806.00	\$0.00
Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,806.00	\$43,806.00	\$0.00

Buttons at the bottom right: 'Remove approvals' and 'Approve'.

4. Double Click on the Budget Amount Information to Open the Budget Request Details Then Click "Details" Icon

Budget Request Details

Account Number: 51310 - Part-Time Wages

2023-2024 (C) ▼



Priority: 2.1 - Minimum Services Levels

Budget Request Title Renew OYO Fiscal Assistant Staff for HCM Control and Financial Effectiveness

Details

	Qty:	CPU:	Total:
Requested Values:	1	\$40,000.00	\$40,000.00
Approved Values:	0	\$0.00	\$0.00

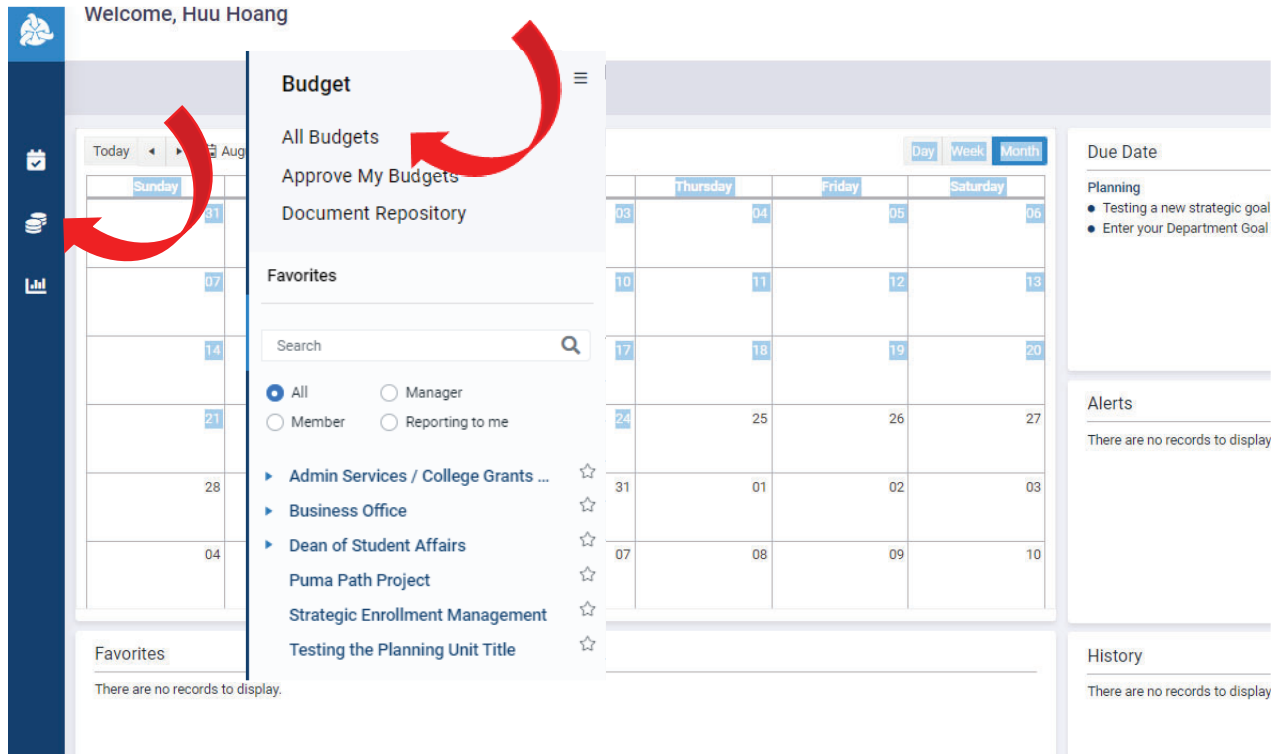
5. Now we can modify the budget details information:
- Select a new FY2024-2025 Action Plan **for a budget** request by click on "Assigned An Action Plan" Icon to select an Action Plan for your budget request.
 - Select Your Budget Request Priority Level: There are three level 1 to 8 for a budget request.
 - Legal Required/Obligation: For Legal requirement or something you MUST have in order to stay in compliance. For example, HLC certification fees, legal fees etc.
 - Select Your Office/Department Priority number 1 through 8.
 - Review and Edit Your Budget Request Title.
 - Select a Funding Type for Your Budget Request.
 - Capital Technology: Budget Requests for IT Capital Items such as Computers, Laptop, Projectors, Printers, Network etc.

EDIT A BUDGET REQUEST in the SPOL SYSTEM (Continues)

- ii. Capital Non-Technology: Budget Request for Capital Non-Technology items such: Non-Technology tools, vehicles etc.
 - iii. Capital Occupational Technology: For Occupational Technology Items are used in classrooms.
 - iv. Capital Occupational Non-Technology: For Occupational non-technology items are used in classroom.
 - v. Facilities and Furniture: Budget Request for facility projects and/or furniture.
 - vi. Operational – Personnel: Budget Request for personnel staff.
 - vii. Operational – Non-Personnel: Budget Request for non-personnel staff expenses.
 - viii. Course Equipment – Budget Request for Course Fee Equipment that you may charge students for a fee in order to purchase this equipment for a program or a course. If your budget request is approved then you don't need to charge this fee to the students.
 - ix. Prop 301: Budget Request for Prop 301 Fund.
 - x. Carl Perkins: Budget Request for Carl Perkins Fund.
 - xi. Software Requirement: Your Budget Request for a software that your budget request will be reviewed by CTC.
 - xii. College Work Study (CWS) Fund: This budget request will be provided to the Director of Financial Aid Office for review and make decision.
- e. Answer question if a FY2023-24 Approved Budget? (Check the Box for a YES answer if it was)
 - f. Answer question if you are expecting a permanent budget for this budget request (Check the box for a YES answer if it is)
 - g. Update the budget request dollar amount.
 - h. Update your Budget Request Description and Justification, which should include:
 - i. Identify the problem that you need to solve or the need of your budget request. How this budget can help you to address or resolve the problem in order you can archive your action plan goal. If this budget request is prompted by a legal mandate or operational requirement, please provide background on this requirement.
 - ii. Provide information how this request can advance your goal at a reasonable cost.
 - iii. Provide information indicate what is the impact if no funding is approved for this budget request? What other options you will take without this budget.
 - iv. Provide us information about which offices or departments will be involved in this budget request project.
 - i. Select "Save" Icon to save your budget request. Congratulation! You complete your budget request edit.
 - j. You can close all window or follow the first step to edit another budget request.

CREATE A NEW BUDGET REQUEST in the SPOL SYSTEM

1. Click the Budget Icon to select Budget  in the SPOL.



Welcome, Huu Hoang

Budget

- All Budgets
- Approve My Budgets
- Document Repository

Favorites

Search

☒ All
 ☐ Manager
 ☐ Member
 ☐ Reporting to me

- Admin Services / College Grants ...
- Business Office
- Dean of Student Affairs
- Puma Path Project
- Strategic Enrollment Management
- Testing the Planning Unit Title

Favorites

There are no records to display.

Due Date

Planning

- Testing a new strategic goal
- Enter your Department Goal

Alerts

There are no records to display

History

There are no records to display

6. Select “All Budgets” in order to view all Department Accounts with your budget requests for FY2023-2024 as following

All Budget By Unit Manager

2024-2025 (Current)

Unit Manager: All Departments or Units Collapse All

Accounts	Approval	% Change	\$ Change	Total Requested	Total Approved
Hoang, Huu					
110-PVMAINCA-801835_INST_SPP - Business Office	..	0%	\$0	\$0	\$0
110-PVMAINCA-801990 - Fiscal and Cashier	..	0%	\$0	\$43,606	\$0
110-PVMAINCA-802005 - Receiving	..	0%	\$0	\$0	\$0
110-PVMAINCA-802570 - Puma Pathway Project Fund	..	0%	\$0	\$0	\$0
110-PVMAINCA-802570_INST_SPP - Special Project	..	0%	\$0	\$0	\$0
110-PVMAINCA-802575_INST_SPP - Fac Serv/Word Proc	..	0%	\$0	\$0	\$0
230-PVMAINCA-801835_INST_SPP - Business Office	..	0%	\$0	\$0	\$0
230-PVMAINCA-801880_INST_SPP - Rental Of Facilities	..	0%	\$0	\$0	\$0
230-PVMAINCA-802070_INST_SPP - Special Projects	..	0%	\$0	\$0	\$0
710-PVMAINCA-802400_INST_SPP - College Capital Allocation	..	0%	\$0	\$0	\$0
Miller, Jennifer					
110-PVMAINCA-801745_STDNT_SV - Dean Of Student Affairs	..	0%	\$0	\$0	\$0

CREATE A NEW BUDGET REQUEST in the SPOL SYSTEM (Continues)

7. Select or Click on the Account Information to open the Department Account, which you want to create a budget request on this department account.

30200 - Business Office 110-PVMAINCA-801990

Unit Manager:
Hoang, Huu

Fiscal and Cashier 110-PVMAINCA-801990

<input type="checkbox"/>	Account Number	2022-2023 Expenditures	2023-2024 Initial	2023-2024 Modified	2023-2024 YTD Obligations	2024-2025 Proposed	2024-2025 % Change	2024-2025 NEW BUDGET REQUEST **	2024-2025 Total	2024-2025 Approved
<input type="checkbox"/>	51230	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00
<input type="checkbox"/>	51310	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00
	Personnel Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00
	Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00

Remove approvals Approve

8. Check if the account number is opened for the purpose of your budget request. If not, following the next step to open the account number.

- a. In order to open the account number, select plus (+) sign icon to view the list of the account numbers as following.

Account Numbers

Select	Account Number	GL Code Description
<input checked="" type="checkbox"/>	51310	Part-Time Wages
<input type="checkbox"/>	51111	Residential
<input type="checkbox"/>	51112	Residential-Overload
<input type="checkbox"/>	51114	Residential-Extended Contract

<input type="checkbox"/>	53140	Insurance Repair
<input checked="" type="checkbox"/>	53210	Professional Services
<input type="checkbox"/>	53220	Copy Services
<input type="checkbox"/>	53221	Physical Examinations
<input type="checkbox"/>	53226	Bank Service Charges

Cancel Save

- b. Select an account by checking the box in front of the account number and select "Save" icon to save it.
c. For example, the account number 53210 is now listed on the Department.

9. Click on the area right under the 2024-2025 NEW BUDGET REQUEST Column with that aligns with new account number showed below.

30200 - Business Office 110-PVMAINCA-801990

Unit Manager:
Hoang, Huu

Fiscal and Cashier 110-PVMAINCA-801990

<input type="checkbox"/>	Account Number	2022-2023 Expenditures	2023-2024 Initial	2023-2024 Modified	2023-2024 YTD Obligations	2024-2025 Proposed	2024-2025 % Change	2024-2025 NEW BUDGET REQUEST **	2024-2025 Total	2024-2025 Approved
<input type="checkbox"/>	51230	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00
<input type="checkbox"/>	51310	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	53210	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00
	Personnel Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00
	Contractual Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00
	Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$43,606.00	\$43,606.00	\$0.00

Remove approvals Approve

CREATE A NEW BUDGET REQUEST in the SPOL SYSTEM (Continues)

10. The Budget Request Details Form is opened, then click the plus (+) sign to expand the Budget Request Details form.

Budget Request Details



Account Number: 53210 - Professional Services

2024-2025 (C) ▼



There is no Enhanced budget data found for this planning year.

Budget Request Summary



Budget Details

Department Action Plan Strategy

Assigned An Action Plan

Department Action Plan Strategy is required

Priority Level:

Budget Request Title

Funding Type

FY2023-24 Approved Budget? (Select If Yes)

☐

Expecting Permanent Budget? (Select If Yes)

☐

Proposed

Approve

Quantity:

Cost Per Item:

Total Price:

11. Now we can enter the budget details information:

- a. Select a new assigned Task by click on **Assign An Action Plan** Icon to select this information for your budget request.
 - i. Assign Task window is opened:
 1. For Planning Unit: Select your department name
 2. For Strategic Action Plan: Select your completed Action Plan
 3. Click on "Assign" icon to confirm your selection.

CREATE A NEW BUDGET REQUEST in the SPOL SYSTEM (Continues)

- b. Select Your Budget Request Priority Level: There are three level 1 to 3 for a budget request.
 - i. Legal Required/Obligation: For Legal requirement or something you MUST have in order to stay in compliance. For example, HLC certification fees, legal fees etc.
 - ii. Select a priority number for your office or department budget, from #1 to #8.
- c. Enter Your Budget Request Title.
- d. Select a Funding Type for Your Budget Request.
 - i. Capital Technology: Budget Requests for IT Capital Items such as Computers, Laptop, Projectors, Printers, Network etc.
 - ii. Capital Non-Technology: Budget Request for Capital Non-Technology items such: Non-Technology tools, vehicles etc.
 - iii. Capital Occupational Technology: For Occupational Technology Items are used in classrooms.
 - iv. Capital Occupational Non-Technology: For Occupational non-technology items are used in classroom.
 - v. Facilities and Furniture: Budget Request for facility projects and/or furniture.
 - vi. Operational – Personnel: Budget Request for personnel staff.
 - vii. Operational – Non-Personnel: Budget Request for non-personnel staff expenses.
 - viii. Course Equipment – Budget Request for Course Fee Equipment that you may charge students for a fee in order to purchase this equipment for a program or a course. If your budget request is approved then you don't need to charge this fee to the students.
 - ix. Prop 301: Budget Request for Prop 301 Fund.
 - x. Carl Perkins: Budget Request for Carl Perkins Fund.
 - xi. Software Requirement: Your Budget Request for a software that your budget request will be reviewed by CTC.
 - xii. Strategic Initiative Fund: Budget Request for New College initiatives such as 4DX.
 - xiii. College Work Study (CWS) Fund: This budget request will be provided to the Director of Financial Aid Office for review and make decision.
- e. Answer question if FY2023-24 Approved Budget? (Check the Box for a YES answer)
- f. Answer question if you are expecting a permanent budget for this budget request (Check the box for a YES answer)
- g. Enter Quantity Number and your Budget Request Amount as the following example.

Proposed		
Quantity:	Cost Per Item:	Total Price:
1	3000	\$3,000.00

CREATE A NEW BUDGET REQUEST in the SPOL SYSTEM (Continues)

- h. Enter your Budget Request Description and Justification, which should include:
 - i. Identify the problem that you need to solve or the need of your budget request. How this budget can help you to address or resolve the problem in order you can archive your action plan goal. If this budget request is prompted by a legal mandate or operational requirement, please provide background on this requirement.
 - ii. Provide information how this request can advance your goal at a reasonable cost.
 - iii. Provide information indicate what is the impact if no funding is approved for this budget request? What other options you will take without this budget.
 - iv. Provide us information about which offices or departments will be involved in this budget request project.
- i. Select “Save” Icon to save your budget request. **Congratulation!** You complete your new budget request.
- j. You can close all window or follow the first step to create another new budget request.

DELETE A BUDGET REQUEST in the SPOL SYSTEM



1. Click the Budget Icon to select Budget in the SPOL, select All Budgets on the drop-down menu.

Welcome, Huu Hoang

Budget

- All Budgets
- Approve My Budget
- Document Repository

Favorites

Search

☒ All
 ☐ Manager
 ☐ Member
 ☐ Reporting to me

- Admin Services / College Grants ...
- Business Office
- Dean of Student Affairs
- Puma Path Project
- Strategic Enrollment Management
- Testing the Planning Unit Title

Due Date

Planning

- Testing a new strategic goal
- Enter your Department Goal

Alerts

There are no records to display

History

There are no records to display

2. View all of your account and budget request information as following

All Budget by Unit Manager

All Budget					
2023-2024 (Current)					
Search		Unit Manager			
		All Departments or Units			
Accounts	Approval	% Change	\$ Change	Total Requested	Total Approved
Hoang, Huu					
110-PVMAINCA-802570 - Puma Pathway Project Fund	00	0%	\$0	\$92,500	\$0
110-PVMAINCA-802570_INST_SPP - Special Project	00	0%	\$0	\$40,000	\$0
230-PVMAINCA-801880_INST_SPP - Rental Of Facilities	00	0%	\$0	\$0	\$0
230-PVMAINCA-802070_INST_SPP - Special Projects	00	0%	\$0	\$0	\$0
710-PVMAINCA-802400_INST_SPP - College Capital Allocation	00	0%	\$0	\$0	\$0
110-PVMAINCA-801835_INST_SPP - Business Office	00	0%	\$0	\$0	\$0
110-PVMAINCA-801990 - Fiscal and Cashier	00	0%	\$0	\$0	\$0
110-PVMAINCA-802005 - Receiving	00	0%	\$0	\$0	\$0
110-PVMAINCA-802575_INST_SPP - Fac Serv/Word Proc	00	0%	\$0	\$0	\$0
230-PVMAINCA-801835_INST_SPP - Business Office	00	0%	\$0	\$0	\$0

3. Click on the Budget Dollar Amount on the list of the accounts in order to view the budget request details.

Budget Request Details

Account Number: 53210 - Professional Services

2023-2024 (C)

Priority: 2.1 - Minimum Services Levels

Budget Request Title: Professional Services for Grant Management Office

Requested Values: Qty: 1 CPU: \$30,000.00 Total: \$30,000.00

Approved Values: 0 \$0.00 \$0.00

DELETE A BUDGET REQUEST in the SPOL SYSTEM (Continues)

- Click “Details” Icon to View the whole budget request.
- Click the three dots (...) on the top right of the window then select “Delete” on the drop-down menu

Budget Request Summary ... X

[Budget Details](#)
[Details](#) [Remarks](#) [Supporting Information](#)


Department Action Plan Strategy
It requires each college have an accounting assistant to perform that make changes for more than 1,200 RPS's and contracts each year and review more than 5,000 payroll line items to identify errors for corrections in the HCM. Process more than 10,000 financial transactions. This action plan also support the continuous mission of our college finance and budget with more financial efficiency, corrective, and transparency (from 90% or 100%) with the current challenge of the financial system. Providing more financial and budget training, report tools; and working on college-wide employees' feedback and expectations about college budget and finance. Increase from 98% (in 2022) to 100% or 100% strategic financial support to meet the needs and expectation from college employees.

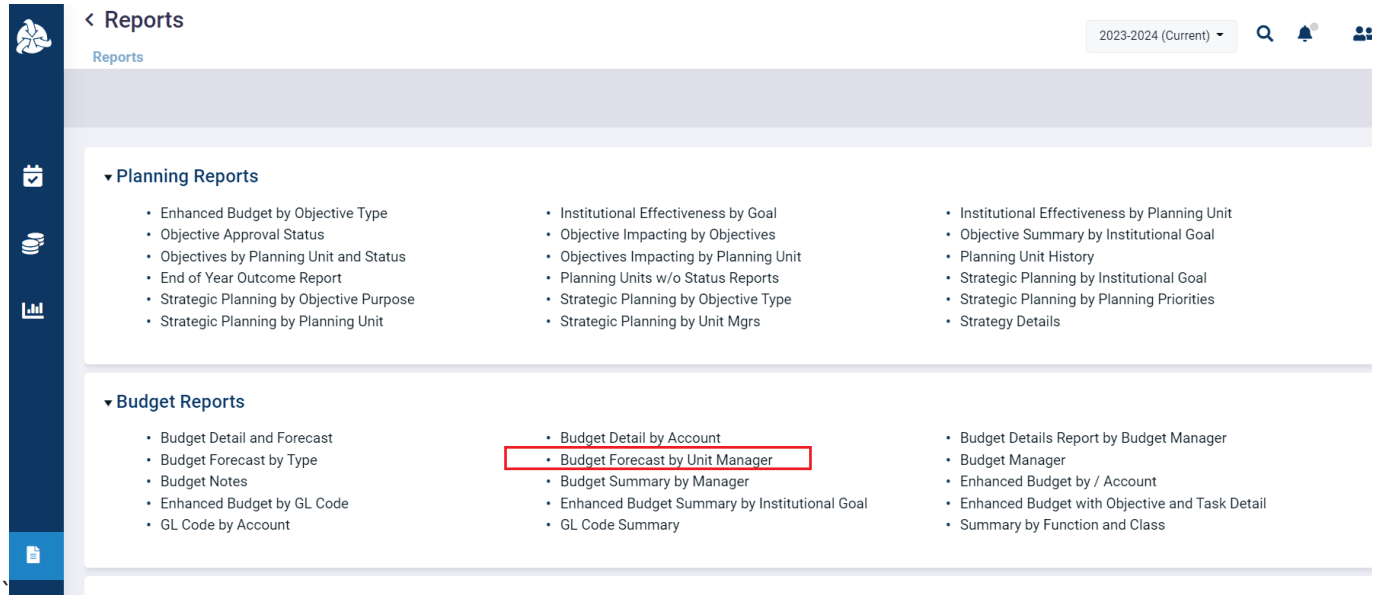
Priority Level:
2.1 - Minimum Services Levels ▼

Budget Request Title

- Select “Delete” again to confirm the delete.
- The Budget Information is now deleted.

RUN BUDGET REQUEST REPORT

1. Select the Record  icon after you log into the SPOL system.
2. There are a list of the report names that you can see, select "Budget Forecast by Unit Manager"



< Reports

2023-2024 (Current) 🔍 🔔 👤

▼ Planning Reports

- Enhanced Budget by Objective Type
- Objective Approval Status
- Objectives by Planning Unit and Status
- End of Year Outcome Report
- Strategic Planning by Objective Purpose
- Strategic Planning by Planning Unit
- Institutional Effectiveness by Goal
- Objective Impacting by Objectives
- Objectives Impacting by Planning Unit
- Planning Units w/o Status Reports
- Strategic Planning by Objective Type
- Strategic Planning by Unit Mgrs
- Institutional Effectiveness by Planning Unit
- Objective Summary by Institutional Goal
- Planning Unit History
- Strategic Planning by Institutional Goal
- Strategic Planning by Planning Priorities
- Strategy Details

▼ Budget Reports

- Budget Detail and Forecast
- Budget Forecast by Type
- Budget Notes
- Enhanced Budget by GL Code
- GL Code by Account
- Budget Detail by Account
- Budget Forecast by Unit Manager**
- Budget Summary by Manager
- Enhanced Budget Summary by Institutional Goal
- GL Code Summary
- Budget Details Report by Budget Manager
- Budget Manager
- Enhanced Budget by / Account
- Enhanced Budget with Objective and Task Detail
- Summary by Function and Class

3. Select "Enhanced" for the Request Type, then Select a Budget Manager name. To run and view report, click "View Report". A sample report will show below.

https://pvcc.strategicplanningonline.com/s3/reporting/s3/reportviewer/showReport=taskshowparameterPrompts=taskbodyaction=auto&reportname=...

Planning Year: 2023-2024 (Current) Request Type: Enhanced Approval: Approved Select Budget Manager: *All Managers,Hoang, Huu

View Report

Budget Forecast By Unit Manager

Planning Year: 2023-2024

Request Type: Enhanced Requested

								Requested		
Account Number	Account Number	Account Title	Description	Funding Type	Priority	FY2022-23 Approved Budget? (select if Yes)	Expecting Permanent Budget? (Select if Yes)	Cost Per Item	Qty	Total
Unit Manager Hoang, Huu										
51118	110-PVMAINCA-802570_INST_SP	Special Project	Budget Title with Herman	Operational - Personnel	#1	No	No	\$2,000	1	\$2,000
51310	110-PVMAINCA-802570_INST_SP	Special Project	Renew OYO Fiscal Assistant Staff for HCM Control and Financial Effectiveness	Operational - Personnel	#2	No	No	\$40,000	1	\$40,000
51316	110-PVMAINCA-801835_INST_SP	Business Office	Huu and Michael Budget Title	Operational - Personnel	#1	No	No	\$10,000	1	\$10,000
53210	110-PVMAINCA-802570_INST_SP	Special Project	Testing Budget Title	Operational - Personnel	#2	No	No	\$20,000	1	\$20,000
53550	110-PVMAINCA-802570	Puma Pathway Project Fund	OYO Planning Research Analyst Sr (Grade 118)	Operational - Personnel	#1	No	No	\$92,500	1	\$92,500
54100	110-PVMAINCA-802570_INST_SP	Special Project	Testing Budget Title #3	Operational - Non Personnel	#2	No	No	\$35,000	1	\$35,000
				Total forHoang, Huu:						\$199,500
								Requested		\$199,500

Print Date: Friday, September 16, 2022

Page 1 of 1