

PVCC'S STRATEGIC PLANNING ONLINE SYSTEM (SPOL)



Strategic Planning Online (SPOL) is a web based software solution specifically designed to help institutions automate the planning and budgeting process. To access the Strategic Planning Online System;

1. Launch Internet Explorer or Safari (**SPOL is currently not compatible with Firefox or Chrome**)
2. Navigate to the SPOL website by entering the following URL in your web browser.

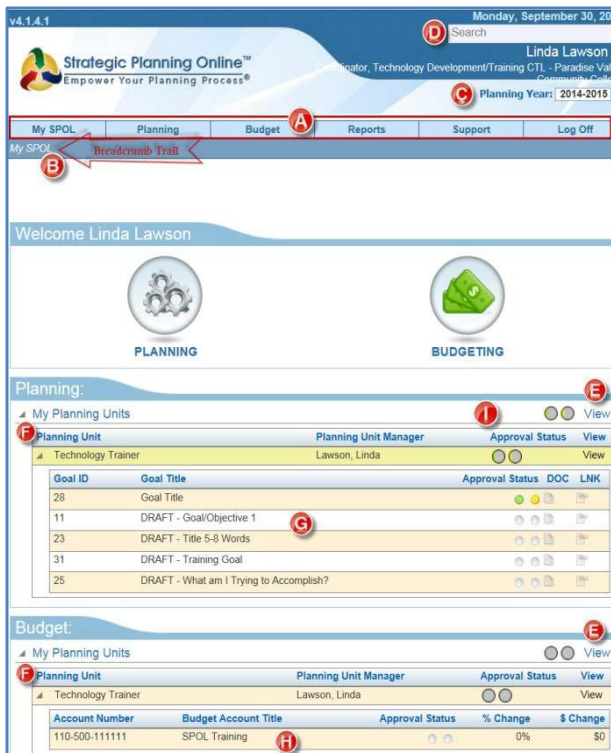
Website URL: www.paradisevalley.edu/SPOL

3. From the SPOL logon window enter your MEID and Password. Your password is your MCCC password. **Do not attempt to change it from the SPOL page.** If you do not remember your password it can be changed at;

<https://memo.maricopa.edu/usertool.html>



Once logged in, the **My SPOL Homepage** opens where you can access the **Planning** or **Budgeting Homepage** by clicking the icon or tab in the navigation bar. You can also view your Planning and Budgeting Units by clicking the arrow next to each of them. The following image is what you will see, with any information you have entered available.



- A** Navigation Bar - Available at the top of every SPOL page.
- B** Breadcrumb Trail - Located underneath the Navigation Bar. Click the page name to quickly get back to where you have been.
- C** Planning Year - Make sure the correct one is selected.
- D** Search
- E** View – General View
- F** Expand View – Click the arrow to expand, and click the second arrow to expand further.
- G** Double-Click the Objective/Goal in order to View, Edit, Modify, or Delete.
- H** Double-Click the Budget Account Title to see Budget Detail.
- I** Approval Status – Not used at this time.



Icon Tray – usually appears at the upper right of most pages. It will show valid actions for that particular page.

MAKE SURE YOU SAVE EACH PAGE AS YOU GO!

Depending on what screen you are on in SPOL the “save” icon will be in different locations.



A small blue disk shaped “Save” icon will be at the upper right-hand side of the screen in some instances, or a “Save” button will show up on the bottom of the screen.



GETTING STARTED – THE PLANNING HOMEPAGE (*Open all year long*)

The **Planning Homepage** is a launching pad for the planning functions of SPOL. From this menu users can View previously created Goals/Objectives, Create a New Goal, Search for Goals, Copy Goal Data, Print a Report, and View Planning Units.

Planning Process for *each* department/unit goal.

What are you trying to accomplish?

How are you going to accomplish it?

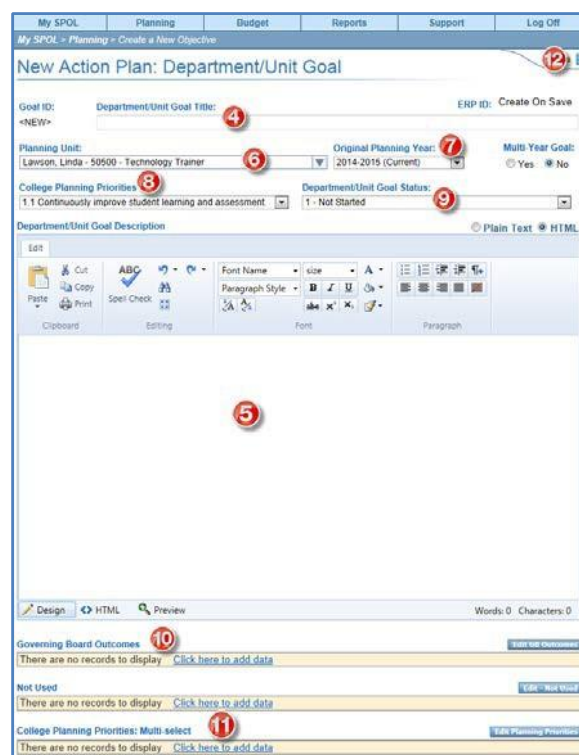
Who is going to accomplish it, and by when will it be done? How will you know you are successful?

What resources do you need, (human or capital)?

TO ENTER A NEW GOAL/OBJECTIVE;

(Each Goal/Objective requires a separate page entry.)

1. Click on **<Planning>** on the *navigation bar* at the top of the page.
2. Click **<Create a New Goal>** on the Planning Homepage.
3. This will open **New Action Plan: Department/Unit Goal** page. (Image on Right)
4. Name the **Department/Unit Goal Title**.
5. In the text editing box type in a detailed **Department/Unit Goal Description**.
6. From the drop-down box select a **Planning Unit** – the department that will carry out this goal.
7. From the drop-down box select a **Planning Year** – the year the objective will begin – multi-year objectives can be extended into future planning years.
8. From the drop-down box select a Goal/Objective Purpose in **College Planning Priorities**.
9. From the drop-down box select a **Department/Unit Goal Status** - (if Goal is new it would be “**Not Started**” or if it existed in your previous budget, “**In Progress**”.
10. Click to add/edit **Governing Board Outcomes**, Select the **outcome/s**, choose the **Primary Outcome**. To make sure your outcomes chosen are saved **CLICK SAVE** in the upper right-hand corner of the box.
11. Click to add/edit **College Planning Priorities: Multi-select**, Select the **outcome/s**, choose the **Primary Outcome** and **CLICK SAVE** in the upper right-hand corner of the box. *Tip: If you “hover” over the Priorities you will get a full description.*
12. After saving your priorities make sure you click the **<SAVE>** icon (blue diskette) at the upper right of the screen to save your Action Plan.



- This will take you to the **Goal Details** page where you can Add, Edit, or Delete Goals/Objectives, and view the Goal/Objective details.

Note: We are not using the "Approval" option at this time. There are additional options below that you may try. Additional training on these option will be coming in the future.

My SPOL | Planning | Budget | Reports | Support | Log Off

My SPOL > Planning > Objective Title

Department/Unit Goal Title

Testing QRG

50500 - Technology Trainer

Unit Manager: Lawson, Linda

Email Unit Manager: linda.lawson@paradisvalley.edu

Approval Notes: [Note Options]

Approval Status: [Draft] -- DRAFT --

Department/Unit Goal Information Detail

Goal ID: 33 Status: 1 - Not Started College Planning Priorities 1.1 Continuously improve student learning and assessment.

Detailed description

Planning Years

Planning Year	Start Date	End Date
2014-2015 - (Current)	07/01/2014	06/30/2015

Governing Board Outcomes

Developmental Education

Workforce and Economic Development

Not Used

There are no records to display

Click here to add data

College Priorities: Multi-Select

1.1 Continuously improve student learning

1.2P Increase degree/certificate completion

Department/Unit Goal Strategies

Strategy/Task Task Detail

Start Date: Not Used

10/1/2013

Select a Type

Date Due: Completed Date:

October, 2013

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31

Today: October 1, 2013

Department/Unit Goal Notes

There are no records to display

Click here to add data

Gap Analysis

There are no records to display

Click here to add data

SWOT

There are no records to display

Click here to add data

Units Impacted

There are no records to display

Click here to add data

Document Management

There are no records to display

Click here to add data

Link Management

There are no records to display

Click here to add data

Objective History

Date / Time	Action	Modified By
10/01/2013 05:55 PM	Create Objective	Linda Lawson
10/01/2013 05:55 PM	Add planning priority to Objective	Linda Lawson
10/01/2013 05:55 PM	Add planning priority to Objective	Linda Lawson
10/01/2013 05:55 PM	Add Institutional Goal to Objective	Linda Lawson
10/01/2013 05:55 PM	Add Institutional Goal to Objective	Linda Lawson

- Click the **Add Strategy** button. In the Strategy/Task box;
- Select the priority **5.0 Task** from the Not used- Select TASK dropdown.
- Select a **Start Date**.
- Select a **Due Date and Completed Date** (click in the box and a calendar is available for you to select dates).
- Select a **Status**.
- Click **Save** in the upper right side of the Strategy/Task box to save the Strategy/Task.

Tip: If you will be requesting a budget item for this goal, develop this strategy to read what it is you are asking for, so it will be helpful and more easy to identify when in the budget module.

PLANNING UNITS

Planning Units represent offices, departments, committees, and other operating units within the institution. Planning Units report to other Planning Units to create a hierarchical structure of our college. This hierarchy also creates the reporting/approval streams within SPOL. Budget accounts are assigned to Planning Units.

Planning Units are not users, users are individuals with the credentials to login to SPOL. Users are assigned to Planning Units as Members, and one member of each Planning Unit is a Manager of the Unit. A planning unit can have multiple members and a user can be a Member and/or Manager of multiple Planning Units.

- Click the **Planning Tab** on the SPOL Home page.
- Click **View My Planning Units** icon. The active planning year will be displayed.
- Double-Click on the name of the **Planning Unit** you wish to edit.

My SPOL	Planning	Budget	Reports	Support	Log Off
My SPOL > Planning > My Planning Units					
My Planning Units for Planning Year: 2014-2015					
My Planning Units					
PU Code	Planning Unit	Unit Manager			
50500	Technology Trainer	Lawson, Linda			

4. The “**My Planning Units**” screen with the selected planning unit will appear. This screen provides the user full “Planning Unit” edit capability for the unit selected.

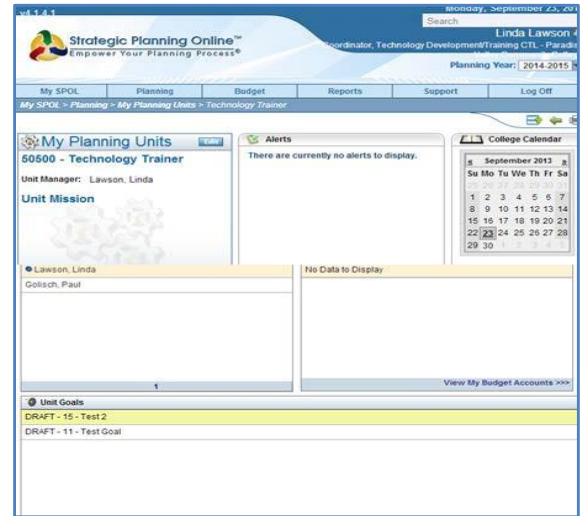
In the “My Planning Units” box;

1. Click on **Edit** and in the **“Unit Purpose”** text box, type in or copy and paste from another document the Mission/Purpose statement for the **“Planning Unit Title”** displayed.
2. Click **Save**.

Edit Planning Unit: Add Planning Unit Members

To add members to your planning unit, (members must be authorized planners already entered as users);

1. Click the **“Edit Unit Members”** tab on the **“Planning Unit Members”** box.
2. Select the members you wish to add from the **“Planning Unit Member Search”** screen by clicking on the user you wish to add. Users are listed in alphabetical order by **“User Name”**.
3. Click **Save**.



NOTES

[illegible]

(closes December 2, 2013)

Note: You MUST complete an Action Plan (Department/Unit Goal) BEFORE working on the Budgeting section.

Budget items can be accessed from multiple locations; from a Strategy/Task or from the Budget Homepage. The Budget Homepage enables budget managers to manage their budgets, review historical budget data, print reports. SPOL, (Strategic Planning Online), manages the following budgets;

Capital Non-Technology	Operational Non-Personnel
Capital Technology	College Work-study
Capital Occupational Non-Technology	Operational – Personnel
Capital Occupational Technology	

After logging in;

Click the **Budget icon** or **Budget tab**, which will take you to the **Budget Homepage**.

On the Budget Homepage click **My Budget Review** to view your current budget account(s) and/or begin a New Budget Request.

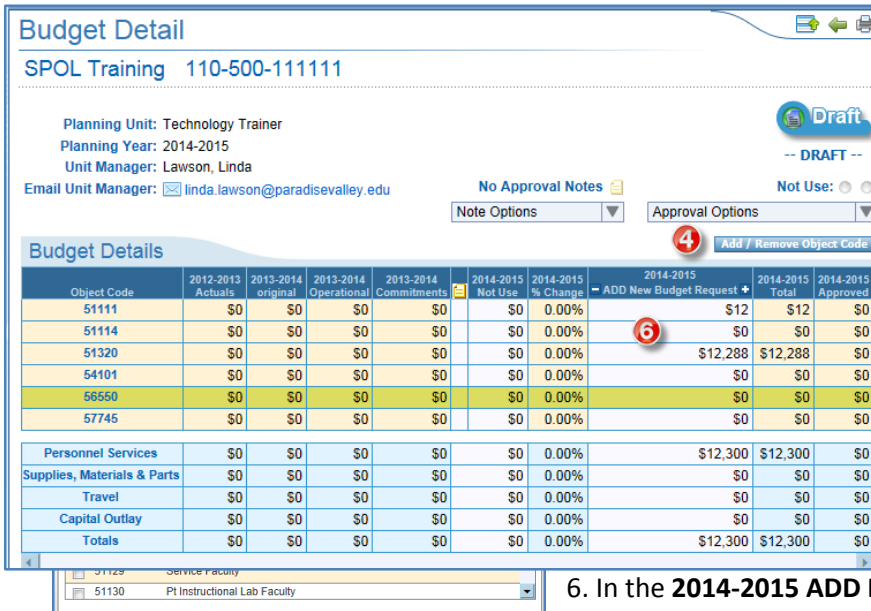


1. Make sure the **Planning Year** is accurate.

2. Click on your **Planning Unit or Department Name** to list all the accounts you manage.

3. Double-click the **Account Number** to be used for the budget request.

This will take you to the **Budget Detail Page**.



4. If you do not see any Object Codes, Click **Add or Remove Object Codes**.

5. Select all of the codes you need to use and click **SAVE**. *Note: You may also search for codes.*

The Budget Detail page is the primary page of the SPOL Budget Module and serves as the organizing point for all budget requests, budget plans, and supporting information regarding each budget account. SPOL is a “closed” module which means that Users only have access to view and/or edit the accounts they are affiliated with.

6. In the **2014-2015 ADD New Budget Request** column, double-click the cell in the row of the Object Code that will be used. A new window will

open.

Note: You will have a minimum of one budget detail for each object code; however one Object Code may have several detailed records.

Enhanced Budget - Forecasted List

Budget Account: 110-500-111111 - SPOL Training
Object Code: 51114 - Residential-Extended Contract

2014-2015 (Current) 2015-2016 2016-2017

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

7. Select the tab of the desired **Budget Year**.
8. Click on the **New Budget Request** tab.

A new window opens which is your **New Budget Request Form**.

New Budget Request Detail

New Budget Request

Planning Year: 2014-2015 Budget Account: 110-500-111111 - SPOL Training GL Code: 51114 - Residential-Extended Contract

Department/Unit Goal Strategy/Task: Please Assign a Task.

Priority: Select a Priority Budget Request Title (Briefly 5 - 8 words what you are asking for)

Funding Type (Commodity Type): Select a Commodity Type

Is This a Renew Budget Request Approved Prior Year, Fiscal Year 2013-2014? Yes No

Do You Expect a Permanent Budget to Support This Request? (Yes - Permanent; No - One Year Only) Yes No

Enter Proposed Budget: Quantity Price Per Item Total Price

Approved (ONLY FOR BUDGET OFFICE): Quantity Price Per Item Total Price

Budget Request Description and Justification (Benefits and Consequences) Not Used: ☐

9. Note the tabs on the upper right of the screen;
Save – Saves the form information. *Note: be careful to Save after entering all the required information.*
Back – Takes you back to the previous screen.
Close – Closes the New Budget Request Form.

10. Under the **New Budget Request Title** you should see; the planning year, budget account number, and the selected object code.

11. Click the **Select an Action Plan** tab.

A new window pops up;

Select an Action Plan / Department Goal

My Planning Units

Planning Unit: Technology Trainer Planning Unit Manager: Lawson, Linda

Strategic System ID Number	Department/Unit Goal Title
28	Goal Title
11	DRAFT - Goal/Objective 1
33	DRAFT - Testing QRG
23	DRAFT - Title 5-8 Words
31	DRAFT - Training Goal
25	DRAFT - What am I Trying to Accomplish?

Task: Two Paragraph Justification of Strategy

12. Click on your department name under the **Planning Unit**.
13. Click a **Department/Unit Goal** to use. A Task box opens.
14. Double-click on the Task title to select a **Department Unit Goal/Task**.

The task will now show on the New Budget Request Form.

New Budget Request Detail

New Budget Request

Planning Year: 2014-2015 Budget Account: 110-500-111111 - SPOL Training GL Code: 51114 - Residential-Extended Contract

Department/Unit Goal Strategy/Task: Two Paragraph Justification of Strategy

Priority: Select a Priority Budget Request Title (Briefly 5 - 8 words what you are asking for)

Funding Type (Commodity Type): Select a Commodity Type

Is This a Renew Budget Request Approved Prior Year, Fiscal Year 2013-2014? Yes No

Do You Expect a Permanent Budget to Support This Request? (Yes - Permanent; No - One Year Only) Yes No

Enter Proposed Budget: Quantity Price Per Item Total Price

Approved (ONLY FOR BUDGET OFFICE): Quantity Price Per Item Total Price

Budget Request Description and Justification (Benefits and Consequences) Not Used: ☐

15. Select a **Budget Priority** for the new request;

1.1 - 1.3 = Legal/Required Obligations - Used for any legal requirements or obligation requests, i.e., membership fees.

2.1 - 2.4 = Minimum Services Levels - Used for requests that plan to provide daily minimum services/operation to college students/employees/community.

3.1 - 3.4 = Needs for Optimal Service Levels - used for requests that you plan to provide daily full services to college students/employees/community.

4.1 - 4.4 = Dream - Used for requests that require expanding of services more than the daily operational needs.

5.0 Task – DO NOT USE

16. Enter your **Budget Request Title** - (descriptive, but brief, 5 - 8 words).

17. Select a **Commodity (Funding) Type**

18. Select **Yes or No** to the question, "Is This is a Renew Budget Request Approved Prior Year, Fiscal Year 2013-2014?"

19. Select **Yes or No** to the question, "Do You Expect a Permanent Budget to Support This Request? (Yes - Permanent; No - One Year Only)."

20. Enter Quantity and Price Per Item (Include tax and other fees if they apply to your budget request).

NOTE: To find out benefit amounts for personnel contact Huu Hoang prior to entering your total.

Enter **Your Budget Request Description and Justification (Benefits and Consequences)** including;

- What you are requesting? Include a meaningful request purpose.
- What is the justification? How does this request benefit the department and college?
- State any consequences of not funding this request. What would happen if this request was not approved?
- If you expect a permanent budget to support this request then provide a support statement as to why?

Click **SAVE** in the upper right hand corner.

Click **CLOSE**

You should see a new requested budget amount on the Budget Detail Window.
