Strategic Planning Online

(SPOL)

Users' Guide

Legal and Human Resources Division
2010

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Getting Started: Logging into SPOL

To access the Strategic Planning Online (SPOL) application, open an Internet browser (be sure to use a Microsoft Internet Explorer 7.x or greater browser) and type in the URL box:

SPOL Login URL: http://spol.wallace.edu/spolnet

To login and get started, type (all lower case) the following **User Name** and **Password** into the "User Name" and "Password" fields on the SPOL login window:
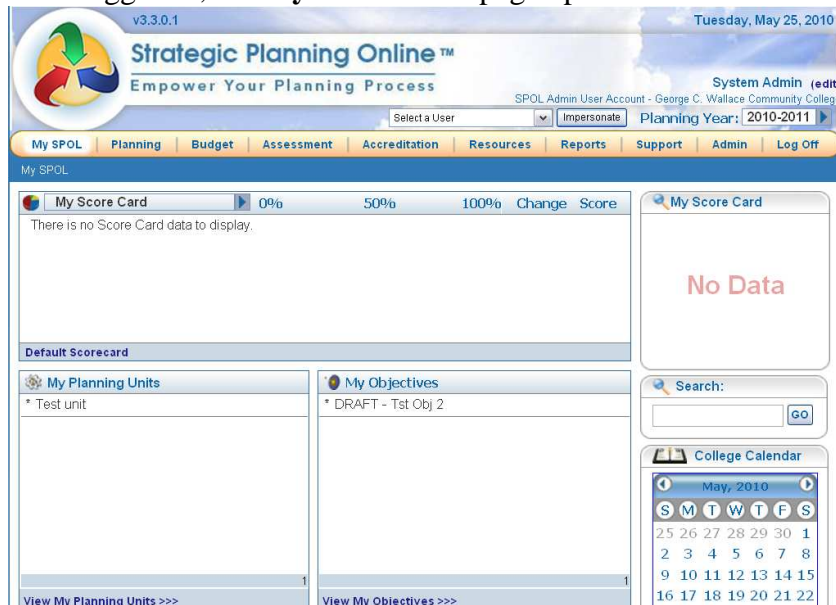
- User Name: **xxxxxxxxx** (**First letter of first name and last name**)
- Password: **12345**

Then, click on the **Login** button directly below the **User Name** and **Password** fields:

Once logged in, the **My SPOL** homepage opens:

Getting Started: Planning Section

Click on the **Planning** tab at the top of the page (next to "My SPOL") on the "My SPOL" homepage:

Planning Section Overview

The Planning Section enables users to create strategic plans, develop an enhanced budget supporting the plan, and create accountability measures to increase the probabilities for success. Users can also develop non-budgeted assessment objectives, frequently used to assess planning efforts and outcomes for almost any situation.

Planning Section Overview: The Planning Homepage

The Planning Homepage is a launching pad for the planning functions of SPOL. From this menu, users can find and manage objectives, planning units, and reports. The main functions of the planning section are directly represented on the Planning Homepage:
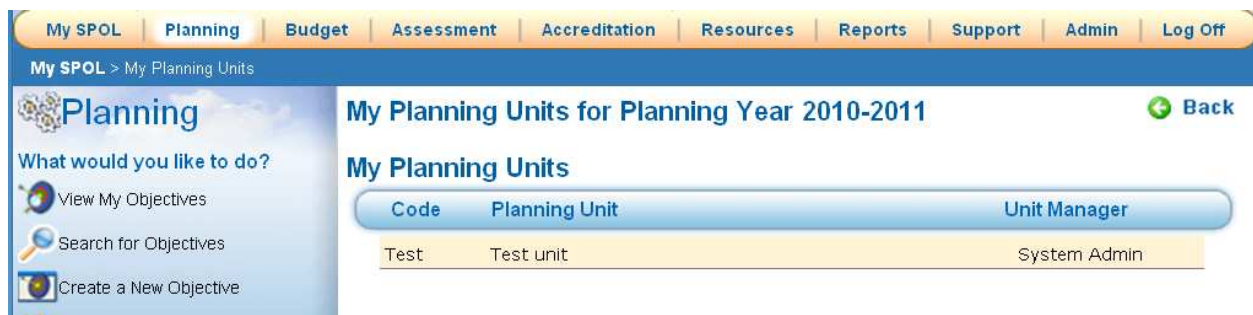
Edit Planning Unit: Unit Purpose

From the "**Planning – Welcome to the Planning Homepage"** screen select the "**View My Planning Units**" icon or select the "**View My Planning Units**" options listed under "**What would you like to do**" section on the screen:

After clicking on either the icon or the menu selection, the "My Planning Units for Planning Year XXXX-XXXX" screen will appear with the active planning year displayed. Click on the name of the planning unit you wish to edit:

Edit Planning Unit: Unit Purpose (Continued)

After clicking on the planning unit for editing, 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. By clicking the "Edit" option to the right of "**My Planning Units**" the "**Planning Unit Detail**" screen will display.

Edit Planning Unit: Unit Purpose (Continued)

From the "Planning Unit Detail" screen the user may click inside the "Unit Purpose" text box and type in or copy and paste from another document the purpose statement for the "Planning Unit Title" displayed (*"Unit Parent, Planning Unit Code, Title, Type, and Function" are assigned by the administrator of SPOL and cannot be changed by a user*):

Edit Planning Unit: Add Planning Unit Members (Continued)

To add members to your planning unit (members must be authorized planners already entered as users) click the "**Add**" icon above the "**Planning Unit Members**" box on the "**Planning Unit Detail**" screen and 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". To see more names click on the numbers (1, 2, 3, 4..) at the bottom right hand corner of the screen shown below:

Planning Unit Member Search   Back   Search

First Name   **Last Name**

User Name   **User Code**

Active Status:

● Active   ○ Inactive   ○ Both

User Name ▲	First Name	Last Name	Title	Email
aboutwell	Ashli	Boutwell	Grants and Exte...	aboutwell@wallac...
Administrator	System	Admin	SPOL Admin Use...	fbarefield@wallac...
ahoffman	A.P.	Hoffman	.	ahoffman@wallac...
akelley	Tony	Kelley	Division director ...	akelley@wallace.e...
awise	Mandy	Wise	.	awise@wallace.edu
ayelverton	Amy	Yelverton	.	ayelverton@walla...
bgilmore	Bates	Gilmore	Allied Health	bgilmore@wallac...
bjones	Brittany	Jones	Upward Bound	bjones@wallace....
broberts	Betty	Roberts	.	broberts@wallac...
bsellers	Bill	Sellers	Coordinator, Car...	bsellers@wallace....
dbreedlove	Debi	Breedlove	Outreach Coordi...	dbreedlove@wall...
dhutto	Don	Hutto	Instructor	dhutto@wallace....
dmccollough	Debbie	McCollough	Director Quality ...	dmccollough@wa...

1 2 3 4

Edit Planning Unit: Add Planning Unit Members – Search

An alternative to scrolling through the list of users is the "Search" option. To use the search option select the field you wish to search on (you may use more than one field), enter as many characters as you think are necessary to find the user you are looking for and click the "Search" icon on the screen title line next to the "Back" icon. Click on the user name you wish to add and that user will be added to the planning unit. If you change your mind and do not wish to add the user, click the "Back" icon and go back to the "**Planning Unit Detail**" screen:

Edit Planning Unit: Remove Planning Unit Members

To remove a planning unit member, click on the user you wish to remove in the "**Planning Unit Members**" box and click the "**Remove**" icon above the box title and to the right of the "**Add**" icon and the member is removed.
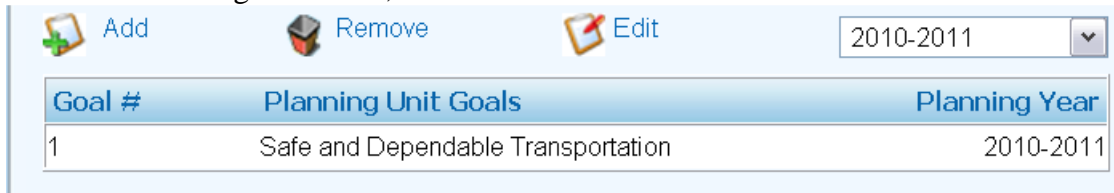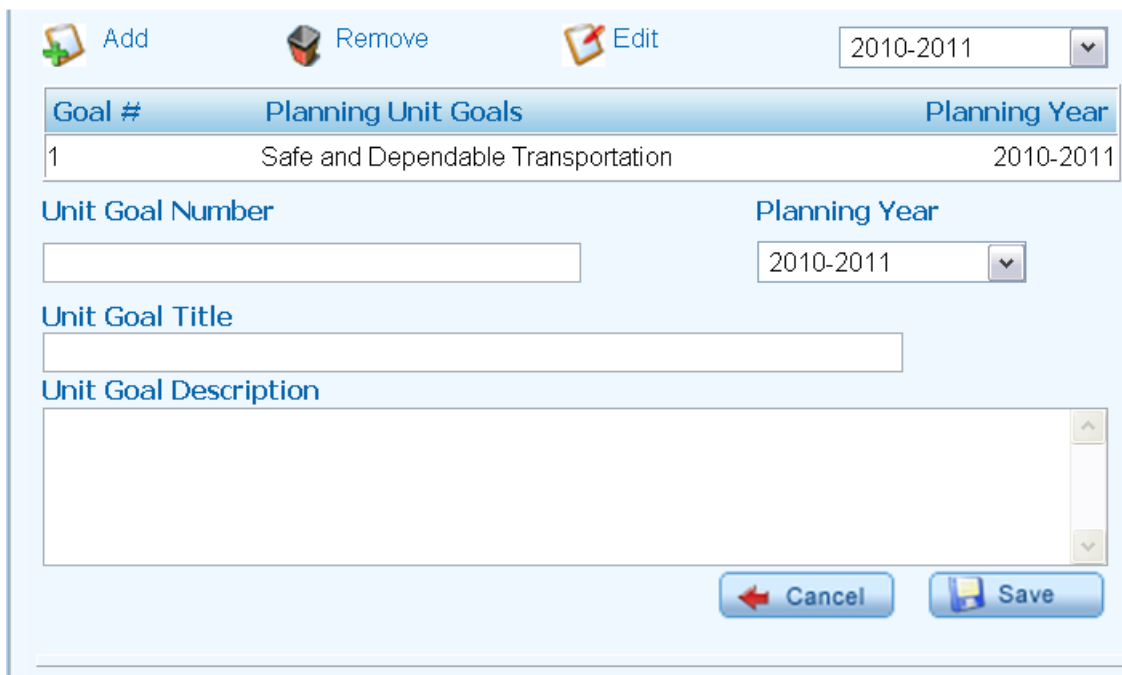
Edit Planning Unit: Add Planning Unit Goals

To add a "Planning Unit Goal," click on the "Add" icon above "Goal #" as shown below:

When the "Add" icon is selected, the following window is displayed showing the three fields required for a "**Planning Unit Goal**": "**Unit Goal Number**," "**Unit Goal Title**," and "**Unit Goal Description**" (The "Planning Year" displayed will be the year you have already selected to work with and should not need to be changed.). Click in the "**Unit Goal Number**" box and key the number (numeric field) you want to assign to the new goal, click in the "**Unit Goal Title**" box (text field) and enter a short title that describes the goal (this title will be displayed on the "**My Planning Units**" page in the "**Planning Unit Goals**" window on the page), click in the "**Unit Goal Description**" box and either type or copy text into the free form field:

When you have finished, click the "**Save**" icon below the "**Unit Goal Description**" text box. If you decide not to save the changes, click the "**Cancel**" icon and the system will ignore the changes made in this window.

Edit Planning Unit: Edit Planning Unit Goals (Continued)
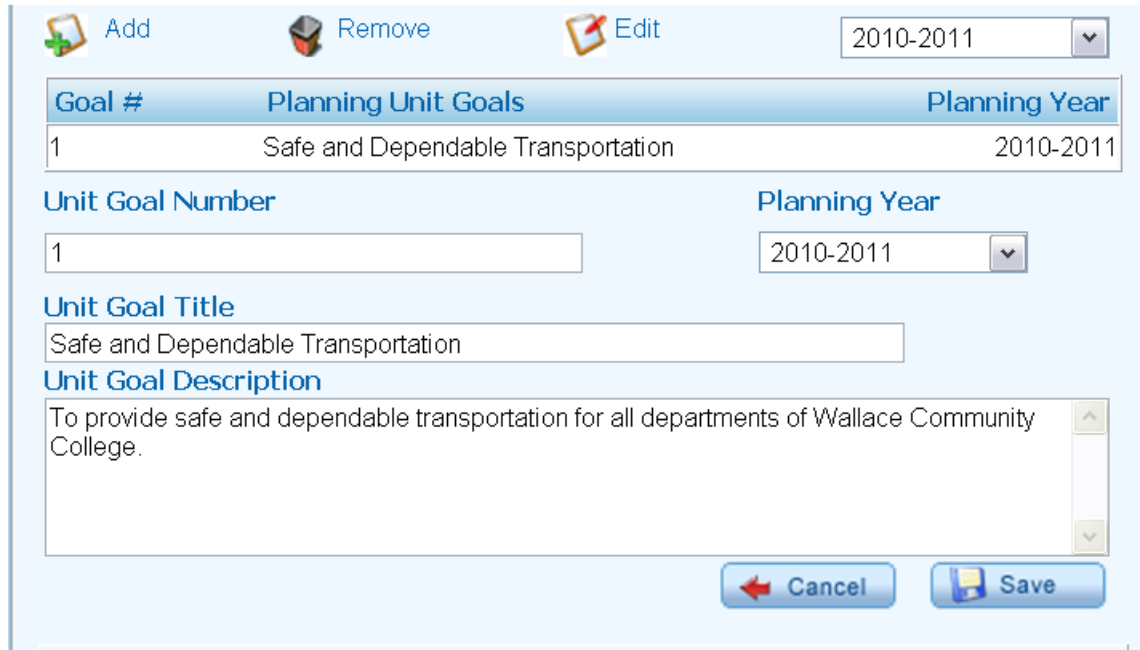
Select Planning Unit Goal to edit by clicking on the goal you wish to edit and then clicking the **"Edit"** icon above the **"Planning Unit Goals"** box and to the right of the **"Remove"** icon:

Edit Planning Unit: Edit Planning Unit Goals (Continued)

To change the **"Unit Goal Number,"** click inside the box below the title and type the new number. To change the **"Unit Goal Title,"** click inside the box below the title and type any changes you desire to make. To change the **"Unit Goal Description,"** click inside the text box below the title and type your changes or copy and paste changes from another source. When you have finished making changes click the "**Save**" icon at the bottom of the screen to the right of the "**Cancel**" icon. If you decide not to save the changes, click the "**Cancel**" icon and the system will ignore the changes made in this window.

Edit Planning Unit: Edit Planning Unit Goals (Continued)

Whether the "Save" icon or the "Cancel" icon is clicked, you will be returned to the "Planning Unit Detail" screen displayed below.

Edit Planning Unit: Remove Planning Unit Goals

To remove a "**Planning Goal**," click on the goal you want to remove in the "**Planning Unit Goals**" box shown below and click the "**Remove**" icon .

When you have completed all changes/additions on the "Planning Unit Detail" screen, click the 💾 save icon at the top of the page or click the 🔙 back arrow icon if you have not made changes that need to be saved.
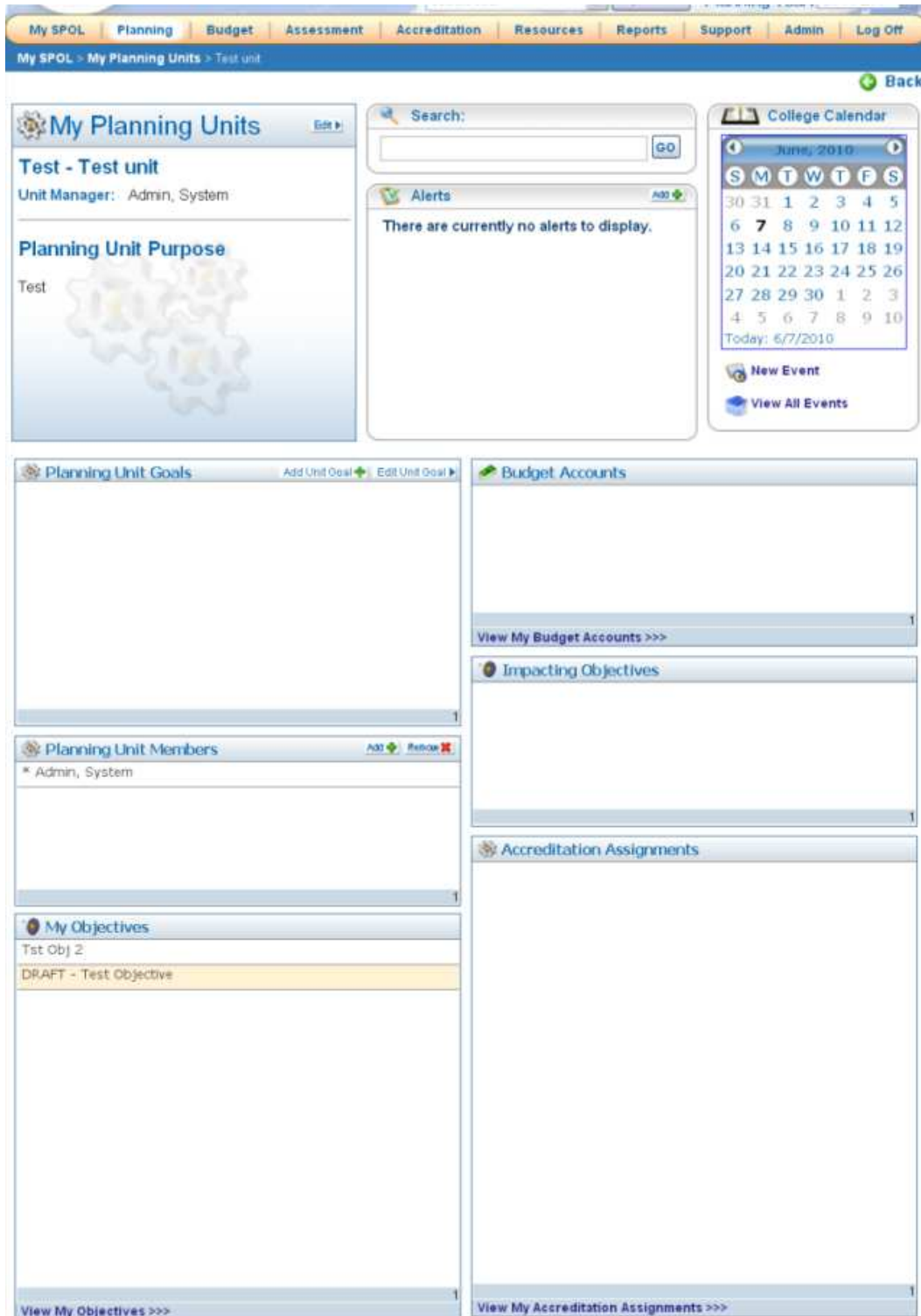
Edit Planning Unit: (Continued)

Whether the 💾 save icon or the ⬅ back arrow icon is clicked, you will be returned to the "**My Planning Units**" screen. From here you may click on the "**Planning**" tab to be taken back to the "**Welcome to the Planning Homepage**" screen.

Creating a New Objective

What is an Objective?

An objective is a planning tool which allows users to:
- Define what the objective is,
- How the objective relates to the strategic initiatives and related goals of the institution,
- What will be required to make the objective actually happen, and
- How we will follow up on the objective to ensure the objective is met.

To **create a new objective**, click on either the **Create a New Objective** link in the left menu **Or** the **Create a New Objective** icon on the "**Planning Homepage**":

Creating a New Objective

After clicking on one of the two "Create a New Objective" links, the **Create/Edit a New Objective** page opens:

Create/Edit a New Objective Page Edit Options

When creating or editing a new objective, the user also has access to the **Back Arrow** icon and **Save** icon.

- **Back Arrow** icon (yellow arrow appearing below page title in upper right corner of menu bar next to "Save" button) cancels the editing operation. If the user is editing an objective, clicking the back button will return the user to the "Objective Details" page. If the user is adding a new record and cancels, clicking the back button will return the user to the "My Objectives for Planning Year XXXX-XXXX" page.

- **Save** icon (floppy disk icon appearing below page title in upper right corner of menu bar next to "Back" button) saves the objective details and returns the user to the "Objective Details" page.

Back and Save icons appear on both the top and bottom of the "Create/Edit a New Objective" page. Once the user enters and saves an objective, the **Objective Details** page opens.

Create/Edit a New Objective Page

The "Create/Edit a New Objective" page provides the user opportunities to describe the objective and how it relates to the strategic plan. Each field defines a different aspect of the new objective.

To create an objective, type or copy and paste an **Objective Title** (e.g., a short description of the objective or an objective title which can be recognized in searches and reporting) into the free form text field:

Create/Edit a New Objective Page (continued)

Select an **Objective ID: Planning Unit** for the objective by clicking on the arrow directly under the field title, **Objective ID: Planning Unit**, then clicking on the **Planning Unit's name** from the drop down list of **Planning Units** to identify the "Planning Unit" responsible for the objective:

Select an **Original Planning Year** by clicking on the arrow directly under the field title, **Original Planning Year,** and next to "Select a Planning Year," then clicking on the appropriate planning year in the drop-down list to select the **Original Planning Year**:

19
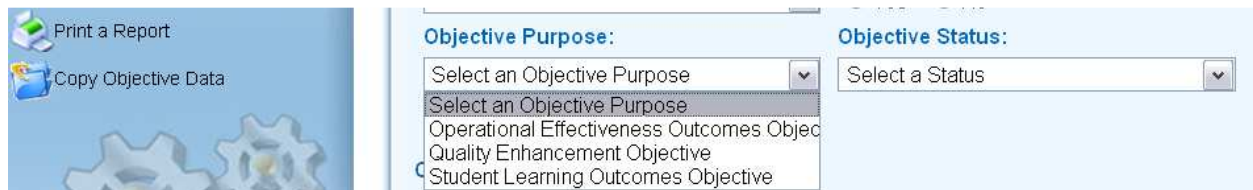
Create/Edit a New Objective Page (continued)

Click in the appropriate "Yes"/"No" radio button to indicate if the objective is a **Multi-Year Objective** (whether the objective is for a single year or spans multiple years): (**NOTE: If your objective does not take more than one year to complete and/or may be repeated year after year, click on the "No" radio button.**)
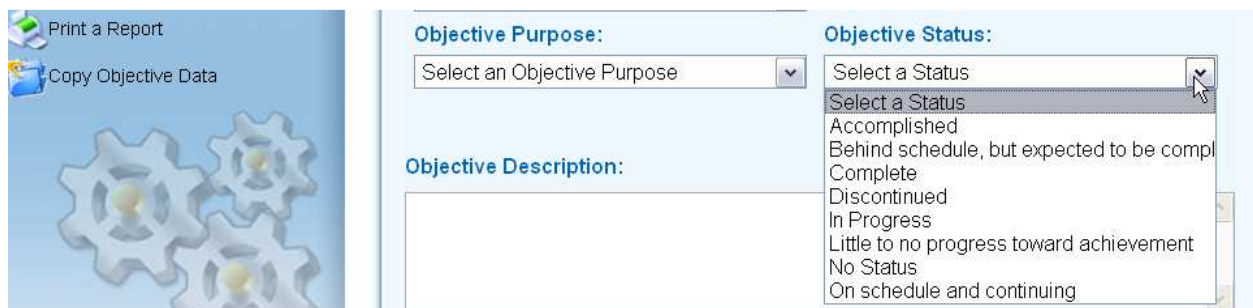
Select an **Objective Purpose** by clicking on the arrow directly under the field title, **Objective Purpose,** and next to "Select an Objective Purpose," then clicking on the appropriate **Objective Purpose** from the drop down list to select it:

Select an **Objective Status** by clicking on the arrow directly under the field title, **Objective Status,** and next to "Select a Status," then clicking on the appropriate **Objective Status** from the drop down list to select it:
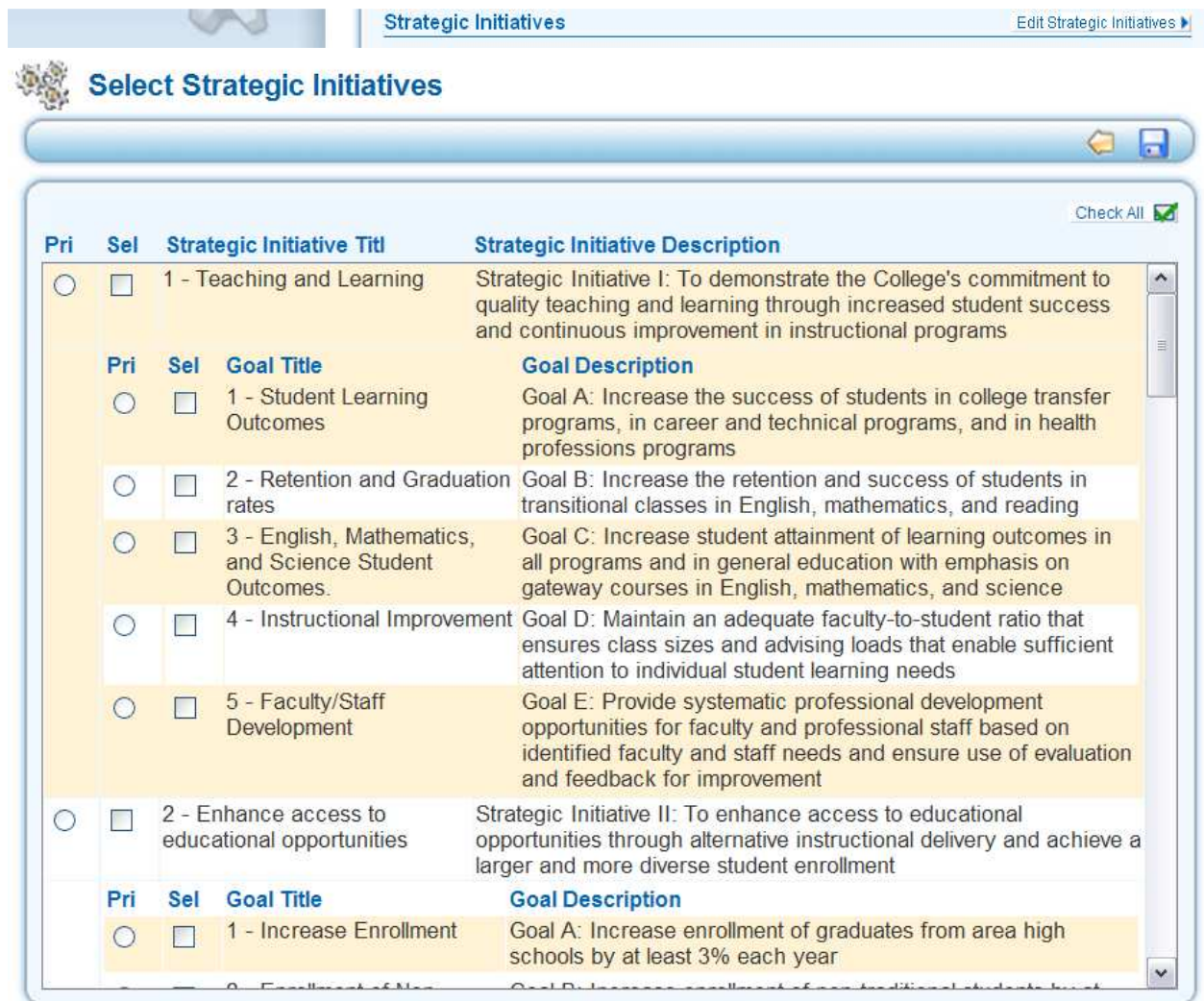
Create/Edit a New Objective Page (continued)

Objective Description provides a free form text field where the user can write a well-formed statement describing what the objective intends to accomplish.

To enter an **Objective Description**, either type or copy text into the free form field:

To select **Strategic Initiatives**, click on the **Edit** button (directly right of the title "Strategic Initiatives), and the **Select Strategic Initiatives** window opens:

Create/Edit a New Objective Page (continued)

To select the **Strategic Initiatives** for the objective:

- click in one or more of the **Sel (Select)** column checkboxes for each **Strategic Initiative and/or Related Goal** supported by the "Objective," click **one** of the **Pri (Primary)** radio buttons to the left of the checkboxes indicating which selection is "primary,"
- or click on the **Check All** Check All 📩 link (upper right corner above and to the right of "Strategic Initiative Description") to select all of the "Strategic Initiatives/Related Goals" and click **one** of the **Pri (Primary)** radio buttons to the left of the checkboxes indicating which selection is "primary," then
- click on the **Save** icon (in the right corner of the "Strategic Initiatives" window).

The "Strategic Initiatives" window closes and you will see the "**Objective Types(s)**" option on the "Create/Edit a New Objective" page. To select **Objective Types(s),** click on the **Edit Objective Types** button (directly right of the title "**Objective Types(s)**), and the **Select Objective Types(s)** window opens:

Create/Edit a New Objective Page (continued)

To select the **Select Objective Types** for the objective:
- click in one or more of the **Sel** (Select) checkboxes next to the radio button under the **Pri (Primary)** column, click **one** of the **Pri (Primary)** radio buttons to the left of the checkboxes indicating which selection is "primary,"
- or click on the **Check All** Check All link (upper right corner above and to the right of "Objective Type Description") to select all of the "Objective Types" listed and click **one** of the **Pri (Primary)** radio buttons to the left of the checkboxes indicating which selection is "primary,"
- then click on the **Save** icon (in the right corner of the "Select Objective Types" window)**.**

The "Select Objective Types" window closes and the "**Planning Priorities**" appears on the "Create/Edit a New Objective" page. **This option is not being implemented at this time**.

Create/Edit a New Objective Page (continued)

After responding to all the fields on the "Create/Edit a New Objective" page, click the **Save** icon at either the upper right corner or lower right corner of the page, and the **Objective Details** page opens:

The **Objective Details** page provides the user opportunities to complete the following planning requirements: **Tasks** (How am I going to do it?); **Assessment Measures** (How am I going to measure my success?); **Units Impacted** (Who needs to make resources available to assist me?); **Intended Results** (What results I am expecting?); **Status Reports** (Interim report – how am I doing so far?); **Actual Results** (End of year – what happened? How did I do?); **Use of Results** (End of year – how did/will I use these results for continuous improvement?); **Associated Standards** (Accreditation standards that this objective addresses, if any (optional for 2010-2011))

Create a New Objective: Tasks

The **Tasks** area allows the user to describe how he/she plans to accomplish the objective, as well as identify budget requirements associated with the Task.
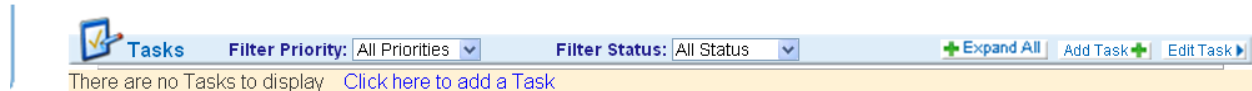
To enter a task, click on the **Add Task** button (to the far right of title "Tasks") and the **Task Detail** window opens:
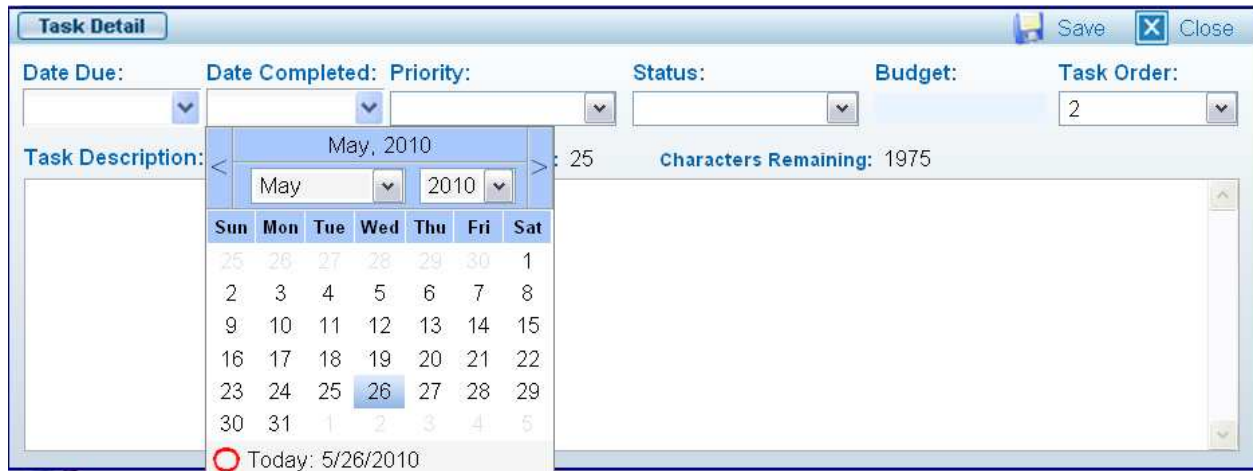
Select a **Date Due** either by entering a date or clicking on the arrow directly under the field title, **Date Due**, and clicking on a date in the calendar:
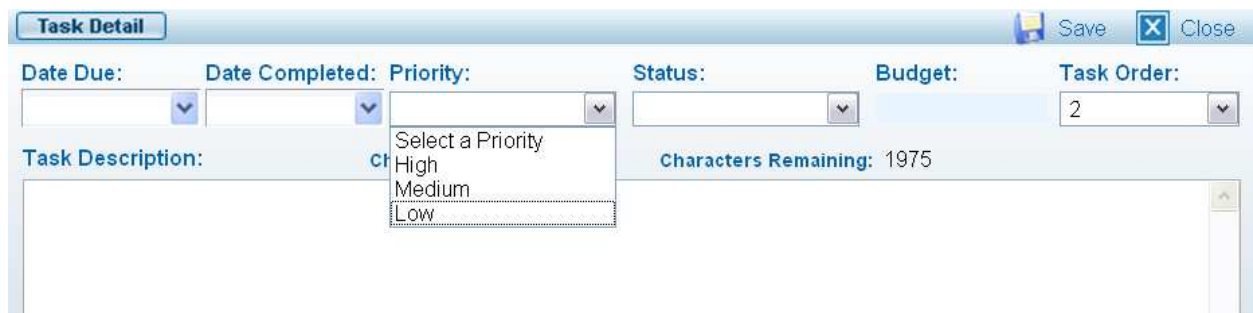
Create a New Objective: Tasks (continued)

Select a **Date Completed** (normally entered after the user creates the objective and completes the tasks) either by entering a date or clicking on the arrow directly under the field title, **Date Completed**, and clicking on a date in the calendar:

Select a **Priority** for the task by clicking on the arrow directly under the field title, **Priority**, and clicking on one of the default priorities: High, Medium, and Low – **NOTE:** *This field is optional.*

Select a **Status** of the task by clicking on the arrow directly under the field title, **Status**, and clicking on one of the default statuses: Incomplete and Complete
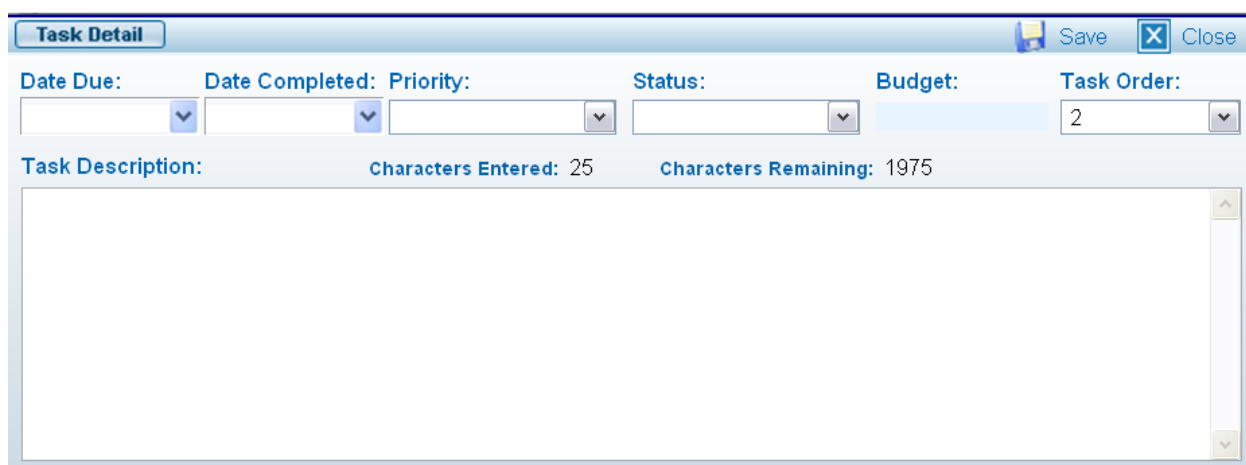
Create a New Objective: Tasks (continued)

Select a **Task Order** by clicking on the arrow directly under the field title, **Task Order**, and clicking on one of the task numbers (after more than one task is entered):

Enter a **Task Description** either by typing text or copying text into free form field limited to 2000 characters total (for all Task Descriptions):
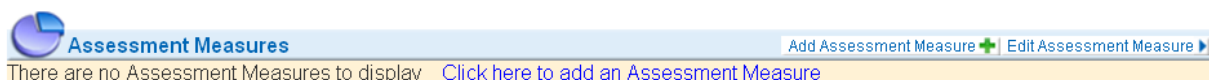
After entering a **Task**, the user clicks the "Save" icon to save the **Task** for the objective. The user repeats these steps ("Add Task" through "Save") for every **task** he/she wants to enter and save for the objective.

Create a New Objective: Assessment Measures
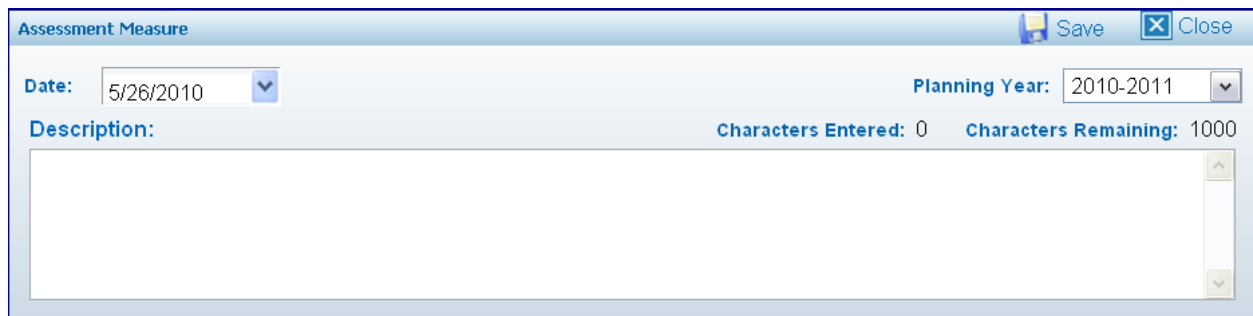
The **Assessment Measures** area allows the user to describe how the user will measure a successful outcome for the objective. The **Assessment Measures** statement should indicate what success will look like if everything goes as planned. **Assessment Measures** are used later to evaluate successful planning and realistic outcomes of the objective.

To enter an **Assessment Measure,** click on the **Add Assessment Measure** button (to the far right of title "Assessment Measures") and the **Assessment Measures** window opens:

Create a New Objective: Assessment Measures (continued)

Enter an **Assessment Measure** either by typing text or copying text into free form field limited to 1000 characters describing what **Assessment Measures** will be used to evaluate the objective and performance of the tasks:

After entering an Assessment **Measure**, the user clicks the "Save" icon to save the report for the objective. The user repeats these steps ("Add Assessment Measure" through "Save") for every **Assessment Measure** he/she wants to enter and save for the objective.

Create a New Objective: Intended Results

The **Intended Results** area allows the user to describe for each objective what is expected as the objective is implemented. **Intended Results** can be as simple or complex as the user decides, entered as often as the user desires, and used as a benchmark to evaluate the objective's progress.

To enter **Intended Results,** click on the "Add Intended Result" button (to the far right of title "Intended Results") and the **Intended Result** window opens:

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Create a New Objective: Intended Results (continued)
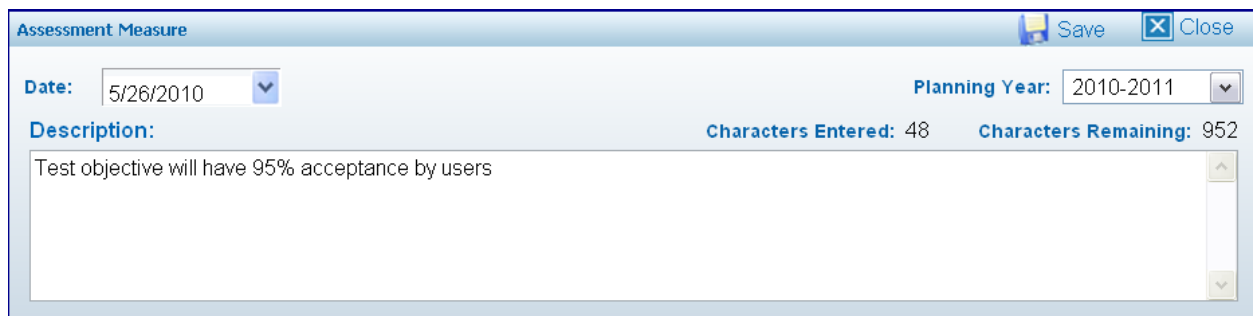

Select an **Intended Result Date** either by entering a date or selecting a date from a calendar by clicking on the arrow directly under the field title, **Report Date**, and clicking on a date in the calendar:
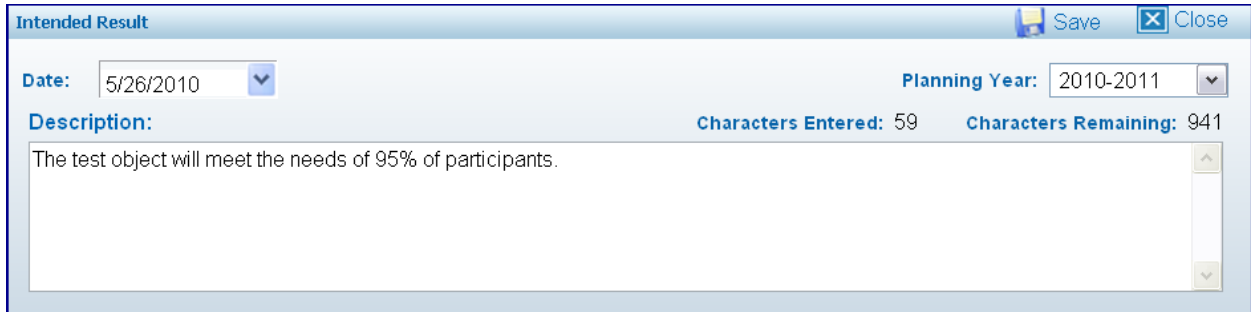

Although the "Planning Year" field will default to the "current planning year," you may select a **Planning Year** either by entering a year or selecting a year from a list of planning years associated with the objective by clicking on the arrow to the right of the field title, **Planning Year**, and clicking on a listed year:

Enter a **Description** either by typing or copying text into free form field limited to 1000 characters describing the intended results of the objective during the planning period:

Create a New Objective: Intended Results (continued)

After entering a **Description**, the user clicks the "Save" icon to save the report for the objective. The user repeats these steps ("Add Intended Results" through "Save") for every **Intended Result** he/she wants to enter and save for the objective.

Objective Approval:

When you have completed an objective, you must approve it as the "unit manager."   A request will be automatically sent to the Dean responsible for the planning area to obtain the Dean's approval.   You must approve an objective as soon as it has been completed. An objective will not appear on a report until it has been approved by the unit manager. To approve your objective and send it to the Dean for approval, click on the [Approve] icon and the following text will be displayed on the screen:

To go back to "Draft," click the [Undo Approval] icon. See screen below:

Create a New Objective: Status Reports

The **Status Reports** area allows the user to maintain progress records for each objective, as well as updates other system users about the objective's status. **Status Reports** can be as simple or complex as the user decides, entered as often as the user desires, and used to evaluate the objective's progress.
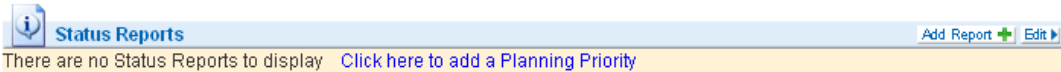
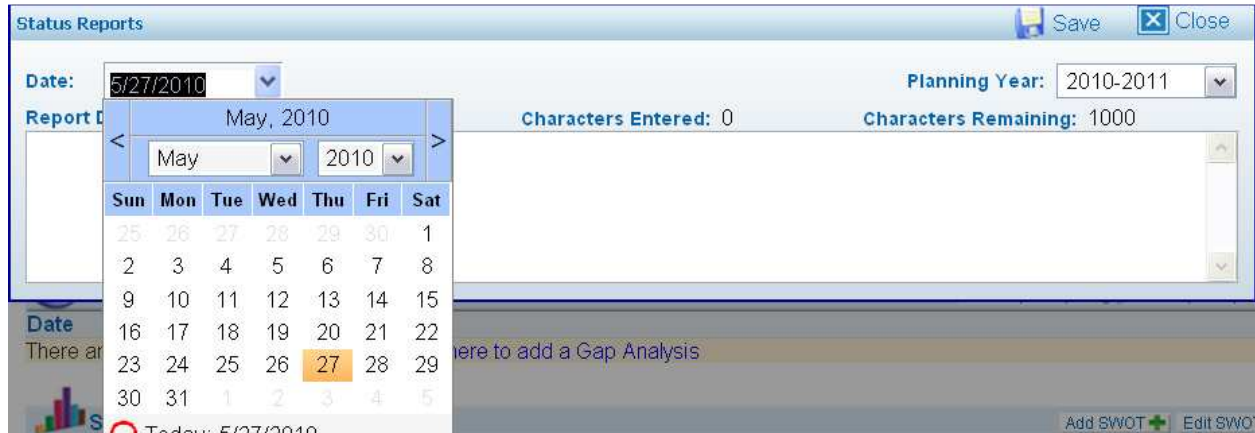To enter a **Status Report,** click on the "Add Report" button (to the far right of title "**Status Reports**") and the **Status Reports** window opens:
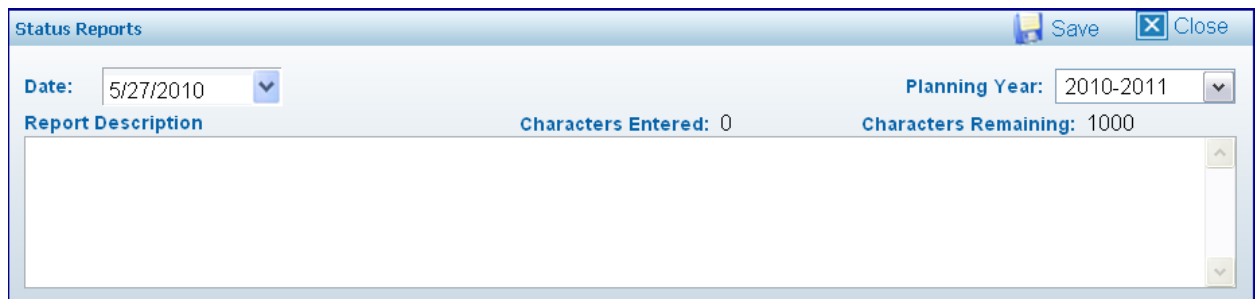
Create a New Objective: Status Reports (continued)

Select a **Date** either by entering a date or selecting a date from a calendar by clicking on the arrow directly under the field title, **Date**, and clicking on a date in the calendar:

Enter a **Status Report** either by typing or copying text into free form field limited to 1000 characters describing what progress on the objective was made during the report period:
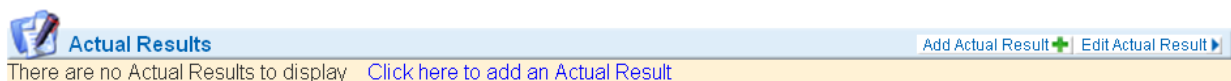

After entering a **Status Report**, the user clicks the "Save" icon to save the report for the objective. The user repeats these steps ("Add Report" through "Save") for every **Status Report** he/she wants to enter and save for the objective.

Create a New Objective: Actual Results (End of Year Activity)

The **Actual Results** area allows the user to describe for each objective what was actually accomplished and how it was accomplished. Actual Results are entered as part of the "end of year activity."

To enter an "**Actual Results,**" click on the "Add Actual Result" button (to the far right of title "**Actual Results**") and the **Actual Result** window opens:

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Select a **Date** either by entering a date or selecting a date from a calendar by clicking on the arrow directly to the right of the field title, **Date**, and clicking on a date in the calendar:

Enter an **Actual Result** either by typing or copying text into free form field limited to 1000 characters describing what accomplished during the planning year on the objective:

After entering an **Actual Result**, the user clicks the "Save" icon to save the result for the objective. The user repeats these steps ("Actual Result" through "Save") for every **Actual Result** he/she wants to enter and save for the objective.

Create a New Objective: Use of Results (End of Year Activity)

The **Use of Results** area allows the user to describe for each objective how the user did/will use these results for continuous improvement. Use of Results is entered as part of the "end of year activity" and is vitally important in the **SACS COC reaffirmation process** in evaluating "Institutional Effectiveness."
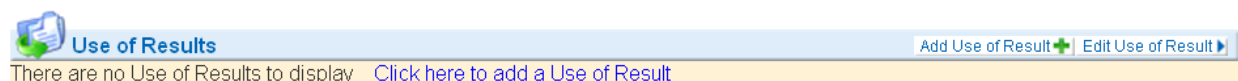
To enter a **Use of Results,** click on the "Add Use of Result" button (to the far right of title "Use of Results") and the **Use of Results** window opens:
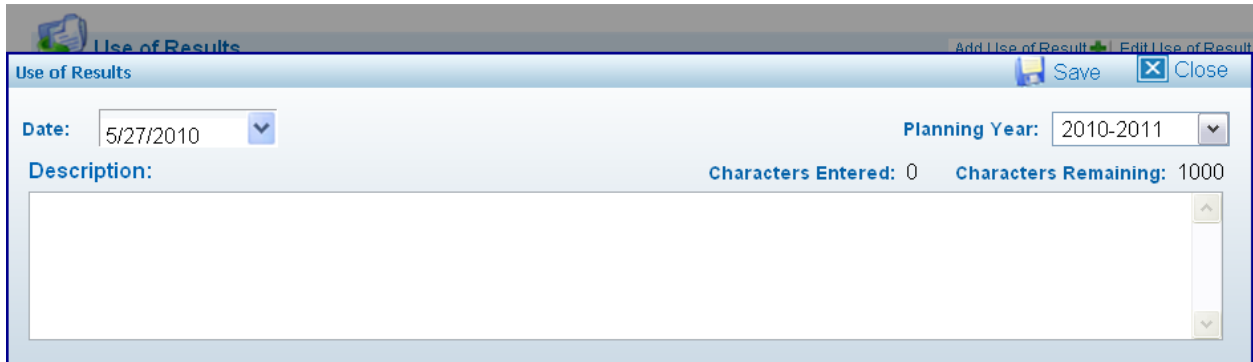

Select a **Date** either by entering a date or selecting a date from a calendar by clicking on the arrow directly to the right of the field title, **Date**, and clicking on a date in the calendar:

Create a New Objective: Use of Results (End of Year Activity)

Enter a **Use of Result** either by typing or copying text into free form field limited to 1000 characters describing how the user will use or has used these results for continuous improvement:

After entering a **Use of Results**, the user clicks the "Save" icon to save the result for the objective. The user repeats these steps ("Add Use of Result" through "Save") for every **Use of Results** he/she wants to enter and save for the objective.

Additional Editing Functionality Available:

On the "Objective Details page, the user will see the **Delete Objective** button (in the right upper corner, next to the "Add Objective" and "Edit Objective" buttons). The **Delete Objective** button deletes the objective the user is viewing or editing.

Change Planning Year:

To change the "Planning Year" you wish to work in, click the down arrow beside the planning year in the "**Planning Year**" input box and a drop down list will

Change Planning Year: (Continued)

be displayed as shown below. Click on the planning year you wish to select, it will become your "working" planning year, and will be displayed in the "**Planning Year**" text box.
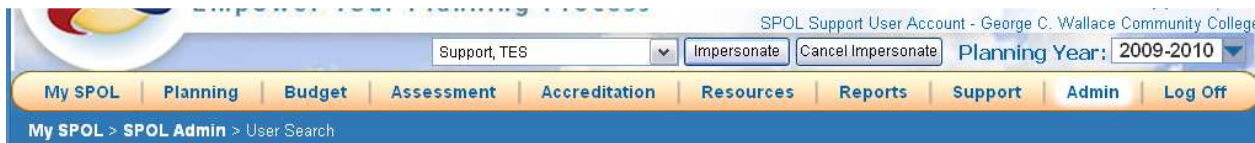
This can be done from any screen displaying the "**Planning Year**" and the year text box. However, make sure the "**Planning Objectives**" you work with have the same "**Planning Year**" associated with them as is displayed in the "**Planning Year**" text box

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