

STRATEGIC PLANNING ONLINE (SPOL) DIAMOND

GUIDE

ENTERING INFORMATION IN SPOL

RUNNING & PRINTING REPORTS

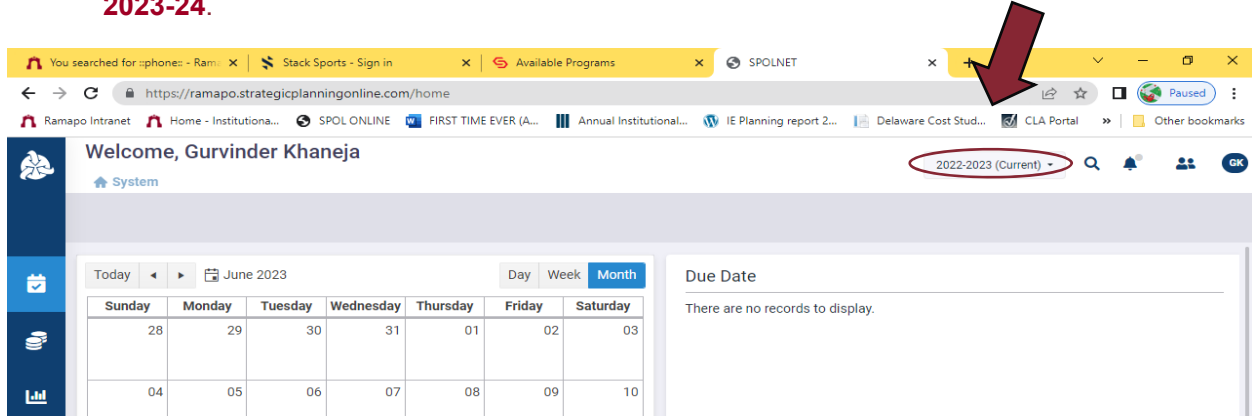
TROUBLESHOOTING



OFFICE OF INSTITUTIONAL RESEARCH JUNE 2023

STEP I

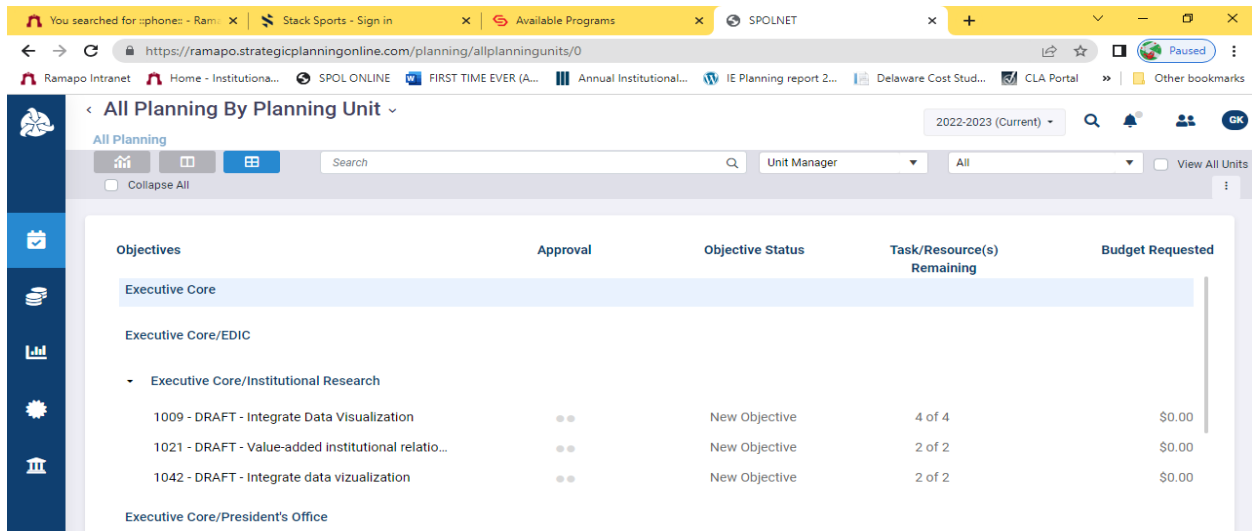
- LOG IN TO SPOL.
- IMPORTANT - ENSURE THAT THE SELECTED YEAR IS THE CURRENT YEAR OR 2023-24.



The screenshot shows the SPOLNET home page for user Gurbinder Khaneja. A red arrow points to the year selection dropdown menu in the top right corner, which is currently set to "2022-2023 (Current)". The page displays a calendar for June 2023 and a "Due Date" section with no records.

STEP II

- SELECT THE PLANNING ICON IN THE BLUE SIDEBAR ON LEFT.
- CHOOSE PLANNING UNIT.



The screenshot shows the "All Planning By Planning Unit" page. A red arrow points to the planning icon in the blue sidebar on the left. The main content area displays a table of objectives with columns for Approval, Objective Status, Task/Resource(s) Remaining, and Budget Requested.

Objectives	Approval	Objective Status	Task/Resource(s) Remaining	Budget Requested
Executive Core				
Executive Core/EDIC				
- Executive Core/Institutional Research				
1009 - DRAFT - Integrate Data Visualization	●●	New Objective	4 of 4	\$0.00
1021 - DRAFT - Value-added institutional relatio...	●●	New Objective	2 of 2	\$0.00
1042 - DRAFT - Integrate data vizualization	●●	New Objective	2 of 2	\$0.00
Executive Core/President's Office				



STEP III

- START DATA ENTRY
- ENTER **“UNIT INFORMATION”** IN THE RIGHT SIDE PANE
NOTE: “UNIT MANAGER” IN SPOL IS THE AAC LIAISON, “UNIT MEMBERS” IN SPOL ARE GENERALLY THE UNIT HEAD AND CEC LIAISON

The screenshot shows the 'Planning Unit Details' page for unit 20002. The left pane displays unit information including the manager (Storms, Stacey), parent unit (EXEC - Executive Core), mission statement, members (Khaneja, Gurvinder; XU, Deyu; Xu, Deyu), budget accounts, and impacting objectives. The right pane is a form for editing unit details, with fields for Unit Code (20002), Unit Title (Executive Core/Institutional Research), Unit Manager (Storms, Stacey), Planning Unit Type (Executive Core), Parent Unit (EXEC - Executive Core), and a rich text editor for the Unit/Department Mission (Purpose). A red arrow points to the right-hand form with the text 'Enter Information'.

- ENTER **“INSTITUTIONAL GOALS, OBJECTIVES, AND TASKS”** BY SELECTING OBJECTIVES.

The screenshot shows the 'Planning Unit Details' page with the 'INSTITUTIONAL GOALS, OBJECTIVES, AND TASKS' tab selected. The 'Objectives' section lists three draft objectives: '1009 - DRAFT - Integrate Data Visualization', '1021 - DRAFT - Value-added institutional relationships with national membership organizations', and '1042 - DRAFT - Integrate data vizualization'. A red arrow points to the first objective.



- ENTER “OBJECTIVE /STRATEGIC PLANS” IN THE RIGHT PANE.

Objective Details

2022-2023 (Current)

OBJECTIVE/STRATEGIC PLAN | ASSESSMENT, FINDINGS, AND RESULTS | ASSOCIATIONS | ATTACHMENTS | ADDITIONAL ASSOCIATIONS

1009 - Integrate Data Visualization

Planning Unit	Unit Manager	
20002 - Executive Core/Institutional Research	Storms, Stacey	
Objective Status	Objective Purpose	Planning Year
New Objective	Unit Objective	2022-2023

Description

Integrate data visualization of Key indicators and other data sets in order to advance data-informed SMART choices enterprise-wide.

Institutional Strategic Goals and Objectives

Strategic Plan 2023-2029

- 3 - Agile Stewardship
- 2 - Inclusive Community
 - 2.a - Inclusive Community → Prioritize personal well-being by promoting healthy practices and environments.
 - 3.d - Agile Stewardship → Strengthen organizational resilience and agility through sustainable practices and data-informed SMART1 choices (Specific, Measurable, Attainable, Realistic, and Time-bound).

Objective Detail

Objective Title: Integrate Data Visualization

Planning Unit: Executive Core/Institutional Research

Planning Year: 2022-2023 (Current)

Objective Purpose: Unit Objective | Objective Status: New Objective

Description: Integrate data visualization of Key indicators and other data sets in order to advance data-informed SMART choices enterprise-wide.

- Link Objectives to the Strat Plan Goals/Objectives
- Click on the objective and select “Strategic Goal(s) and Outcomes(s) in the right pane. Make sure you “Save it” before proceeding to the next screen

Objective Details

2022-2023 (Current)

OBJECTIVE/STRATEGIC PLAN | ASSESSMENT, FINDINGS, AND RESULTS | ASSOCIATIONS | ATTACHMENTS | ADDITIONAL ASSOCIATIONS

1009 - Integrate Data Visualization

Planning Unit	Unit Manager	
20002 - Executive Core/Institutional Research	Storms, Stacey	
Objective Status	Objective Purpose	Planning Year
New Objective	Unit Objective	2022-2023

Description

Integrate data visualization of Key indicators and other data sets in order to advance data-informed SMART choices enterprise-wide.

Institutional Strategic Goals and Objectives

Strategic Plan 2023-2029

- 3 - Agile Stewardship
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Institutional Goal

Select Category: Strategic Plan 2023-2029

Primary	Select	Goal Number	Institutional Goal Title
<input type="checkbox"/>	<input type="checkbox"/>	1	Academic Excellence & Student Success
<input type="checkbox"/>	<input type="checkbox"/>		1.a - Provide learning environments and opportunities that encourage the development of deep content knowledge that leads to discerning engagement in work and in the world.



- ENTER **“ASSESSMENT FINDINGS AND RESULTS”** IN THE RIGHT PANE.
NOTE: THIS INCLUDES ASSESSMENT CYCLE, TASKS, MEASURES, TARGETS AND FINDINGS
- CONNECT **“TASKS”** TO **“OBJECTIVE”** MANUALLY.

Objective Details
All Planning > Executive Core/Institutional Research > 2022-2023 (Current)

OBJECTIVE/STRATEGIC PLAN | **ASSESSMENT, FINDINGS, AND RESULTS** | ASSOCIATIONS | ATTACHMENTS | ADDITIONAL ASSOCIATIONS

Assessment Cycle
● 2-Years

Task/Resource(s)

Start Date	Due Date	Type	Priority	Results Met
02/09/2023		Budgetable	Medium	Not Met

Map implementation plan and seek endorsement from MET/ITS

Start Date	Due Date	Type	Priority	Results Met
05/02/2023		Budgetable	Medium	Not Met

Purchase software, implement, and raise awareness

Task Details

Start Date: 6/20/2023 | Due Date: month/day/ | **Enter Information**

Task Type: Select | Priority Level: Select

Results Met: Select | Completed Date: month/day/

Description: Paragraph

Cancel Save

STEP IV

- ONCE THE PLAN IS ENTERED IN SPOL, YOU SUBMIT YOUR PLAN FOR APPROVAL.
- GO TO **“OBJECTIVE/STRATEGIC PLAN”** TAB.
- SELECT THE DROP DOWN MENU NEXT TO THE DRAFT AND SELECT **“SUBMIT FOR APPROVAL”** CHOICE.
- AN EMAIL IS SENT TO THE **“AAC LIAISON”** (OR LABELLED **MANAGER** IN SPOL) FOR THE RESPECTIVE UNIT.

Objective Details
All Planning > Executive Core/Institutional Research > 1009-DRAFT - Integrate Data Visualizatio...

OBJECTIVE/STRATEGIC PLAN | ASSESSMENT, FINDINGS, AND RESULTS | ASSOCIATIONS | ATTACHMENTS | ADDITIONAL ASSOCIATIONS

1009 - Integrate Data Visualization

Planning Unit: 20002 - Executive Core/Institutional Research | Unit Manager: Storms, Stacey

Objective Status: New Objective | Objective Purpose: Unit Objective | Planning Year: 2022-2023

Description:

Submit for Approval
View Approval History



Step V

- PRINT “**REPORT**” FOR SUPERVISORS, DEPARTMENT HEADS AND/OR VICE PRESIDENTS.

Welcome, Gurbinder Khaneja

2022-2023 (Current)

Today June 2023

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	01
02	03	04	05	06	07	08

Due Date

There are no records to display.

Alerts

There are no records to display.

History

There are no records to display.

Favorites

- Objective
 - [Unit Objective - Integrate data visualization of key indicators and other data sets in order to advance data informed SMART choices enterprise wide.](#)

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- SELECT “**STRATEGIC PLANNING BY PLANNING UNIT**” REPORT

< Reports

Reports

2022-2023 (Current)

▼ Planning Reports

- Enhanced Budget by Objective Type
- Objective Approval Status
- Objectives by Planning Unit and Status
- Outcomes
- 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
- Task Details



- FROM THE DROP DOWN MENUS, SELECT APPROPRIATE “**PLANNING YEAR**” AND “**PLANNING UNIT(S)**”
- SAVE THE REPORT AS A WORD OR PDF DOCUMENT.
- REVIEW AND SHARE.

The screenshot shows the SPOLNET web application interface. The browser address bar displays the URL: https://ramapo.strategicplanningonline.com/report-view/strategicplanning-report/strategicplanningresults_by_pu. The interface includes a navigation sidebar on the left with icons for home, reports, and other functions. The main content area is divided into several sections:

- Planning Year:** A dropdown menu set to "2023-2024".
- Filters:** A series of "Include" and "Exclude" radio buttons for various categories:
 - Unit/Department Mission (Purpose)
 - Institutional Strategic Goals and Objectives
 - Objective Types
 - Task
 - Target
 - Findings
 - Next Cycle
 - Units Impacted
 - Associated Outcomes
- Planning Units:** A list of units with checkboxes. One unit, "EXEC - Executive Core", is selected. Other units include "50100 - Executive Core/EDIC", "7000B - Executive Core/Environmental Health and Safety", "20002 - Executive Core/Institutional Research", "50 - Executive Core/President's Office", "30002 - Executive Core/Public Safety", and "Title IX - Executive Core/Title IX".
- Content Type:** Radio buttons for "Plain Text" (selected) and "HTML".
- View Report:** A blue button in the top right corner.

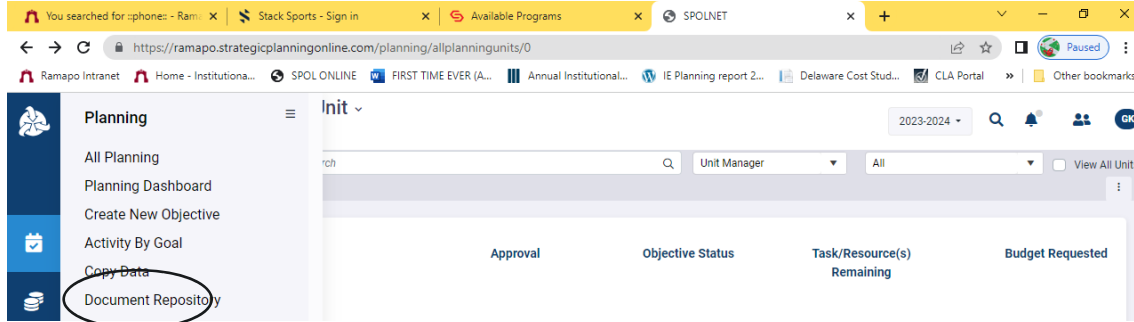
Below the filters, the report title "Strategic Planning Results" is displayed, along with sorting options: "Sorted By: Planning Unit" and "Planning Year: 2023-2024". Two red arrows point to the "2023-2024" dropdown and the "EXEC - Executive Core" selection in the Planning Units list.



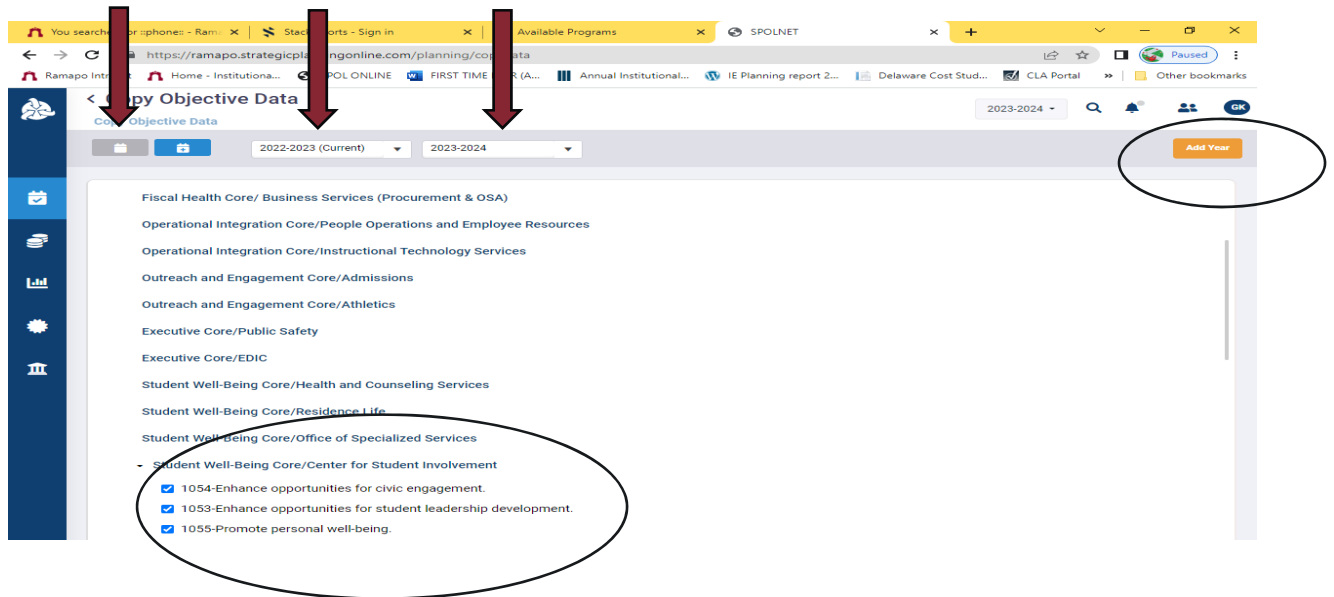
TROUBLESHOOTING

IF YOU ACCIDENTALLY SAVED YOUR INFORMATION IN THE WRONG YEAR.

- FROM THE PLANING PAGE, SELECT “COPY DATA”



- SELECT THE GREY TAB ON THE LEFT AT TOP OF THE SCREEN.
- SELECT ORIGINAL YEAR, DESTINATION YEAR, AND CHOOSE “**MOVE OBJECTIVE DATA**” FROM THE COPY OPTIONS DROP DOWN MENU
- SELECT OBJECTIVES THAT NEED TO BE MOVED AND ADD YEAR IN ORANGE BUTTON ON RIGHT.



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