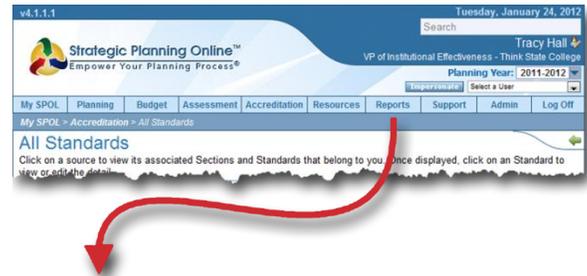




SPOL uses common conventions throughout the system to ensure ease of navigation and use. It will be helpful to familiarize yourself with these common conventions. User instructions on specific topics may not include the basic navigational steps that you will find in this article, but will assume that you are familiar with system functionality covered here.

## NAVIGATION BAR

The **Navigation Bar** is available at the top of every SPOL page, just below the SPOL Header. The buttons on the Navigation Bar correspond with the **SPOL modules**; only those modules for which you have permissions will be displayed. Click on one of the buttons to navigate to the **module Homepage**.



## HOMEPAGES

Each SPOL module has its own **Homepage**; click on the appropriate button on the **Navigation Bar** to access the homepage. The Homepage will provide you with a variety of selections to interact with records in the module in three basic ways: 1) **View** (which may allow you to **Edit** from there); 2) **Add**; and 3) **Search**.

## BREADCRUMBS

Just below the **Navigation Bar** on every page is a blue banner that contains navigational **“Breadcrumbs.”** The message on this banner will tell you the steps followed to get you to the **current page**. The format of the Breadcrumbs is [First Page Name] > [Second Page Name] > [X Page Name] > [Current Page Name]. You click on a **Page Name** in the Breadcrumbs to navigate directly to that page.



## ICON TRAY

An **Icon Tray** appears at the upper right of most pages in SPOL, just below the **Breadcrumbs** banner. The Icon Tray contains the **valid actions** available to you for this page, and will remain at the upper right of the page as you scroll vertically. You will find some combination of the following icons/actions in the Icon Tray:



**Back:** Click the Back icon to navigate back to the previous page. For best results use this Back button, rather than the back button on your browser.



**Print:** Click the **Print** icon to view the **Reports** available from the page, based upon the record displayed. The **“More Reports”** options will take you to the **SPOL Reports Homepage**.



**Save:** Click this icon to **Save** the current record. Many pages – including the Objective, Standard, Budget, and Outcome detail pages – display in “read” view, and require you to open a data store in “edit” view to add and edit page data. Once that data store is saved and closed, there is no need to save the overall page. Consequently, you will not see this icon unless the record should be saved before navigating away from it.



**Check Out/In:** Click this icon to **Check-Out** the record, **enabling edit-mode**. While the record is checked out by you, no other User can check it out. Not all records require check-out before editing; the icon will be displayed only when required. If the edit buttons on the record do not activate upon clicking the Check-Out icon, you might not have **permission to edit** this record.

Once you have checked out the record, click the icon again to **check the record back in**. If you attempt to navigate away from the page with the record checked out, you will be asked if you would like to check it back in before leaving the page.



**Show/Hide Supporting Data:** This icon appears if the page you're on has been formatted to collapse/expand to hide/display some data stores. If the arrow on the icon points down, click on it to display hidden data. If the icon points up, the page can be collapsed to hide some data.



**Add Record:** Click the **Add Record** icon if you want to **create a new record** of the type that you are currently on. This is not a common function and requires specific user permissions.



**Delete Record:** Click the **Delete Record** icon if you want to **remove the record** completely and permanently. The Delete action requires specific user permissions, and it should be used with care.

## HEADER BARS & BUTTONS

1. Many pages in SPOL organize a broad assortment of data and records onto a single page. These pages are broken into multiple sections, areas, or window panes, commonly called **Data Stores**.
2. Most Data Stores display a **Header Bar** above the records, which provides the **name** of the Data Store or the records it contains.
3. If **actions** can be taken for a Data Store, you will see **buttons** displayed at the **far right** end of the Header Row. These buttons may be on the Header Bar or just above the Data Store.
4. If buttons are **grayed-out**, they will not respond to your click. This may be because:
  - You need to **check out** the record to activate the buttons
  - You don't have the appropriate **user permissions** for the action on this type of record
  - You don't have the proper membership/role for the action on the record
  - The record is be locked due to an approval or overall lock-out for the module
5. If **no buttons** appear for a Data Store, the records contained flow from somewhere else in SPOL and cannot be acted upon from this page.

The screenshot shows a user interface for an 'Objective Description'. At the top right, there are 'Add', 'Edit', and 'Delete' buttons. The main content area is divided into sections: 'Objective ID: 13', 'Status: Completed', and 'Objective Purpose: 3 Unit/Department Plan'. Below this is a detailed description of the objective. A table-like structure follows with columns for 'Institutional Goals', 'Objective Types', and 'Planning Priorities'. Each column has an 'Add/Edit' button. At the bottom, there is a 'Tasks' section with 'Add', 'Edit', and 'Expand All' buttons.