

Help Sheet

Staffing Requests in the Online Planning system

<https://montevallo.campuslabs.com/planning>

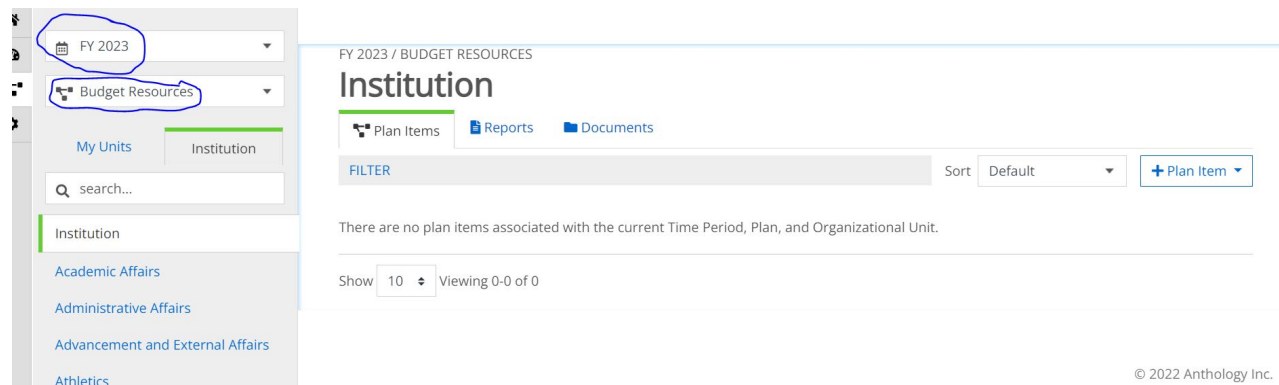
Google Chrome is the recommended web browser (other browsers have had minor issues).

Log In (your username & password are the same as your UM Network username & password)

In the upper left you'll see a house icon (Dashboard) and an icon that looks like an org chart (Plans). Click on the org chart icon.

Now, next to those icons you should see a drop-down box for the fiscal years (ex. FY 2021). That is where you select between the fiscal years. Currently, you want to be in FY 2023.

Below that fiscal year drop-down box, you should see another drop-down box. This is where you select between Strategic Planning, Unit Planning & Assessment, Student Learning Outcomes (for faculty), and Budget Resources. You may not see all those listed, it depends on the credentials assigned by user (who needs access to what). Select Budget Resources.



Below the drop-down boxes is where you will select your unit/department. Depending on how many you have responsibility for, several may be visible. Some people may need to first select their division, then their department will appear. I cannot see what you see, so if you have trouble finding your unit/department, please let me know and I'll walk you through it.

Once you are in Budget Resources, in the main portion of the screen you should see three tabs under your unit name. Plan Items, Reports, and Documents.

Institution

Plan Items Reports Documents

FILTER Sort Default + Plan Item

There are no plan items associated with the current Time Period, Plan, and Organizational Unit.

Show 10 Viewing 0-0 of 0

Staffing Request ✓
Mid-Year Funding Request

- The Plan Items tab is where you go to create your Staffing Request. Once you've filled in the items in the form, scroll down and click the blue "Done" button at the bottom of the page. **Insure that all fields with asterisks are populated. Also include as much information about the position as possible on this form. Finally, in the "rankings" item please just enter a number 1.** That is it, there is not a submit process. Your division head will be able to see what you've entered.

Edit Plan Item

Template: Staffing Request

Item *

New Staffing Request Item

Unit *

Institution

Budget Account Number

Format of field should be: 0

Requested by

Approved by (Dean)

If applicable. Enter name of dean.

Approved by (VP)

Enter name of VP.

Suggested Position Title

Contract type

Estimated Annual Salary

Position Description

File	Edit	View	Insert	Format	Tools	Table							
		Paragraph	▼	B	<i>I</i>						▼		▼
P													

Related Unit Plan Goal

File	Edit	View	Insert	Format	Tools	Table							
		Paragraph	▼	B	<i>I</i>						▼		▼

Comments Regarding the Need for this Position

File	Edit	View	Insert	Format	Tools	Table							
		Paragraph	▼	B	<i>I</i>						▼		▼
P													

Plan Item Files

There are no attachments.

[+ File](#) [+ Folder](#)

Progress

Start *


End *

Ranking *

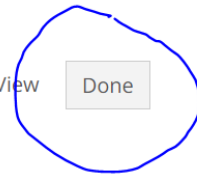
Ranking *

This is a priority ranking number.

 Delete

 Read View

Done



- The Reports tab is where you go to create a pdf (or Word, etc.) of your completed document, if you'd like one. Look for the report named Staffing Request, then click on “View Report: 10/1/22 – 9/30/23,” then “View Report.” Please let me know if you have questions about that.

FY 2023 / BUDGET RESOURCES

Institutional Research, Planning & Assessment

Plan Items **Reports** Documents

2020-2021 (FY21) Unit Plan

This report has been shared from Institution and can only be modified there.

2020-2021 (FY21) Unit Plan

[View Report: 10/1/20 - 9/30/21](#)

Staffing Request

This report has been shared from Institution and can only be modified there.

Staffing Request

[View Report: 10/1/20 - 9/30/21](#)

Staffing Request

This report has been shared from Institution and can only be modified there.

FY2021-2022

[View Report: 10/1/21 - 9/30/22](#)

Staffing Request

This report has been shared from Institution and can only be modified there.

[View Report: 10/1/22 - 9/30/23](#) ✓

- The Documents tab contains help sheets – miscellaneous planning documents you might find helpful. THESE ARE NOT CURRENTLY UPDATED, HOWEVER. SO BEST TO USE IRPA WEBSITE RESOURCES.

If you have any further questions, please call (665.6399) or email (jdean5@montevallo.edu) Jerome Dean for help.