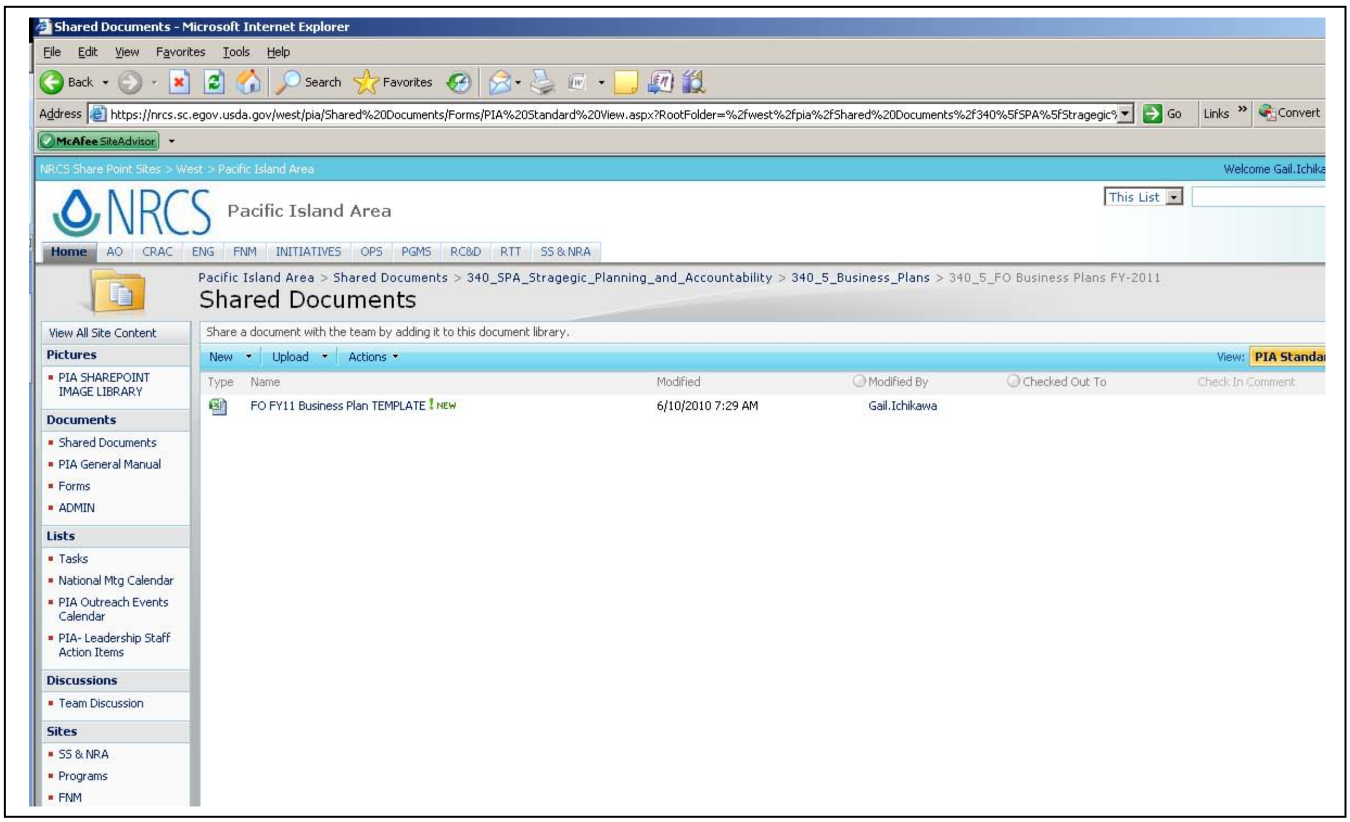
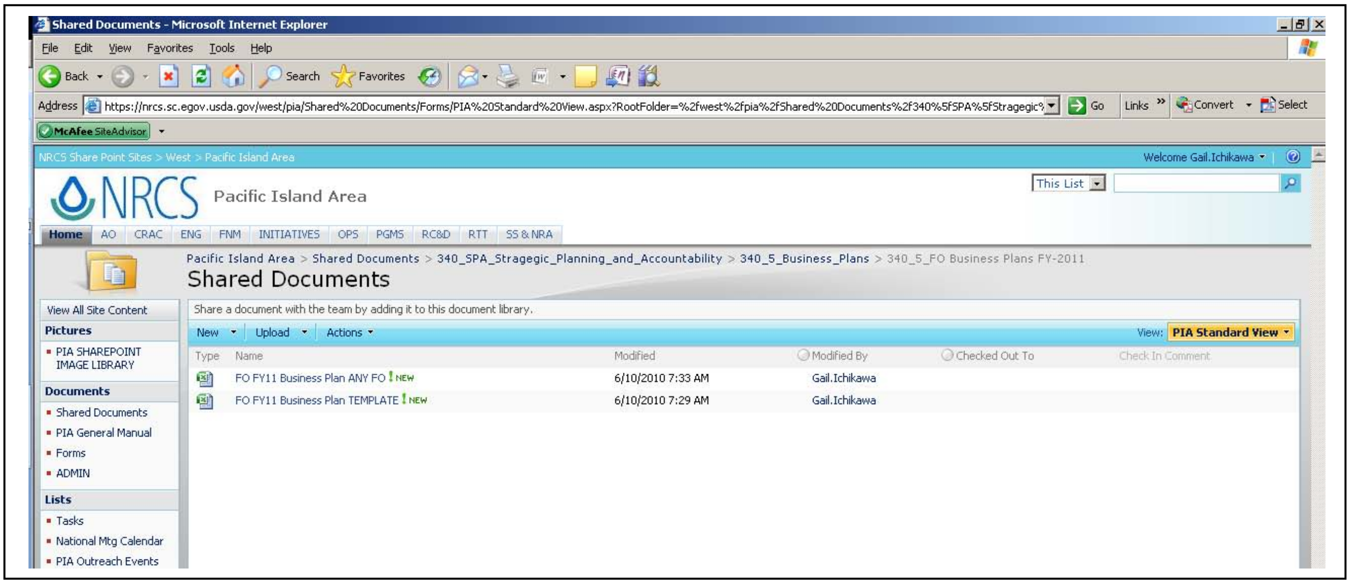
Share Point Instructions
for Developing
FY-2011 Draft Field Office Business Plans

Following are instructions for using the FO FY11 Business Plan TEMPLATE to develop a draft plan for your own office.

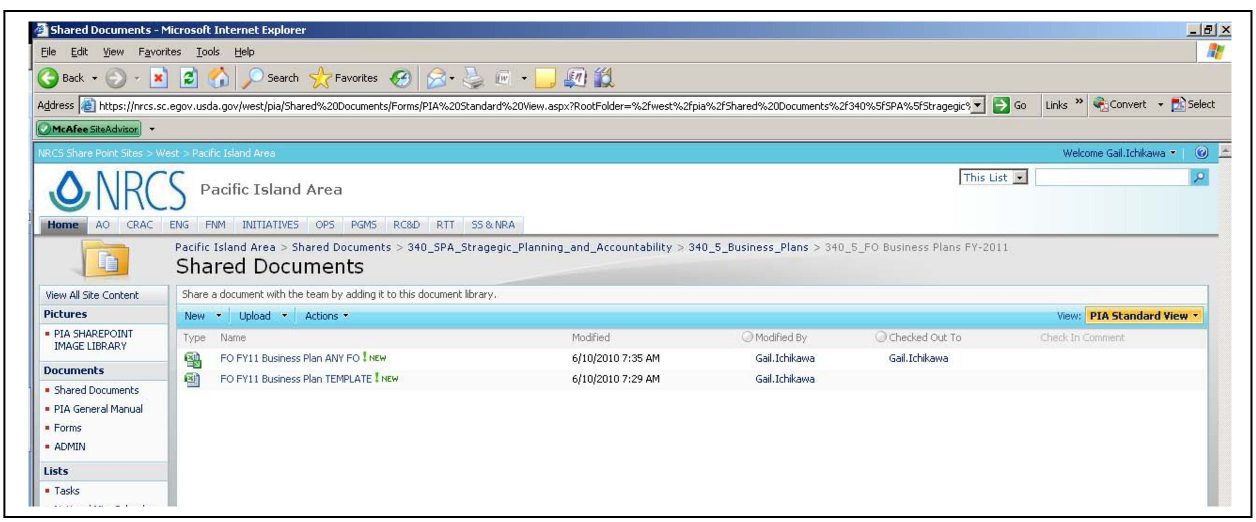
1. **To access the FO Business Plan TEMPLATE:**
   Shortcut: Click this direct link to the TEMPLATE.
   OR
   - Open Internet Explorer
   - Access the PIA Share Point site at the following address: https://nrcs.sc.egov.usda.gov/west/pia/default.aspx
   - Click Shared Documents, on the PIA Share Point Home page on the left side column under Documents.
   - Click the 340 SPA folder on the Share Documents page.
   - Click the 340_5_Business_Plans folder.
   - Click the 340_5_FO Business Plans FY-2011 folder. This will bring you to the TEMPLATE.



2. **Make a Copy of the FO Business Plan template file for your own office:**
   - Click the template filename to open the EXCEL file.
   - Click the Microsoft logo at the top left of the screen to access the pull down menu.
   - Click Save As.
   - Rename the template for your office by replacing "Template" with your office name.
   - Click Save.
   - Close the EXCEL file by clicking the "X" at the very top corner of the EXCEL worksheet screen.
   - The Shared Documents page will refresh and your renamed file should appear on the Shared Documents screen. Be patient, this may take a few seconds.



3. **Edit your Business Plan using Check Out:**
   To input data or edit your office business plan, you need to use the "Check Out" function to first open your file. If you do not check out your file first, your edits will NOT be saved. To Check Out your file:
   - Hover over your filename, click the down triangle which appears to the right of the filename.
   - Click Check Out.
   - Click OK. Your filename should reappear with a little green arrow on the left next to the EXCEL "X".
   - Click the green arrow. This will open your business plan in EXCEL.



4. **Include the following in your Field Office Business Plan:**
   - at least two to three concise quantifiable action items per section that your field office must complete to accomplish the Agency's strategic goals and annual performance goals;
   - action items tied to demonstrated need, identified corrective actions, or desired improvements to support field office operations;
   - linkage to priorities and goals. See the "FY11 Linkage" worksheet for the linkage codes; and
   - timeframes and responsibility for completing the action items.

5. **Save your FO Business Plan using Check In:**
   When you are done editing your business plan, you need to use the "Check In" function. If you do not check in your file, your edits will NOT be saved. To Check In your file:
   - Close the EXCEL file by clicking the "X" at the very top corner of the EXCEL worksheet screen.
   - Click Yes, if the "Do you want to save the changes?" appears.
   - Click Yes, when the "Do you want to check in now?" screen appears.
   - Add Version Comments, if you want to and click OK.
   - The Shared Documents page will refresh and your filename should reappear without the little green arrow to the left of it.

Due Date for Draft FY-2011 FO Business Plans: July 30, 2010