BUSINESS PLAN PORTAL

USER GUIDE

Updated October 2024

Contents

Overview

The Business Plan Portal is a user interface that streamlines the information gathering process for submitted Work Unit Business Plan. This tool is designed for the Kansas Department of Transportation's (KDOT) work units to support the agency's strategic planning effort.

The Business Plan Portal is maintained by the Continuous Improvement team. This document provides guidance on how to use the Business Plan Portal.

For any Business Plan development or Business Plan Portal inquiries, please contact the Continuous Improvement Team: Valerie Jimenez, Earl Witham, or Mohith Ravi.

For all general Strategic Plan inquiries, please contact Vanessa Lamoreaux, Deputy Secretary.

How to Submit a Business Plan

1. Users can access the Business Plan Portal through the following*:
   - Link: Business Plan Portal

   - Intranet: Strategic Plan
     i. The Strategic Plan webpage can be found listed within the Organizational Pages home page

   - Intranet: Announcements Sliders found on the Intranet Home Page

2. Click “Get Started”.

3. Complete all fields to complete your Work Unit Business Plan:

   - Agency Division or District
   - Bureau/Office (if applicable)
   - Program/Area (if applicable)
   - Leader of Work Unit / Program
   - Work Unit Purpose / Definition
   - Agency Goal
   - Agency Objective
   - Work Unit Objective
   - Metric / Measure (if applicable)
   - Reporting Timeline
   - Person Responsible for this Work Unit Objective
   - Attach any relevant files containing data or information
   - Data Source (if applicable)
   - Work Unit Strategy
   - Strategy Metric / Measure (if applicable)
   - Expected Date of Completion
   - Status

4. Click one of the four options provided to submit your business plan. All four options will result in users will receive an email containing a PDF copy of their submitted business plan. Users can forward this email/PDF to any other individuals for their records.

   - A preview of the Business Plan PDF will appear briefly. Users do not need to do anything when this occurs, the preview will disappear promptly.

   - The options are as follows:

     a. **Submit & Add Strategy for this Objective**: This will submit all the information entered and will bring the user to page 3 to add an additional strategy to that work unit objective. All completed fields prior to page 3 will remain the same.

b. **Submit & Add Next Work Unit Objective**: This will submit all the entered and will bring the user to page 2 to add another work unit objective. All completed fields prior to page 2 will remain the same.

c. **Submit & Start Next Goal**: This will submit all the information entered and will bring the user to page 2 to report on a new goal. All completed fields prior to page 2 will remain the same.

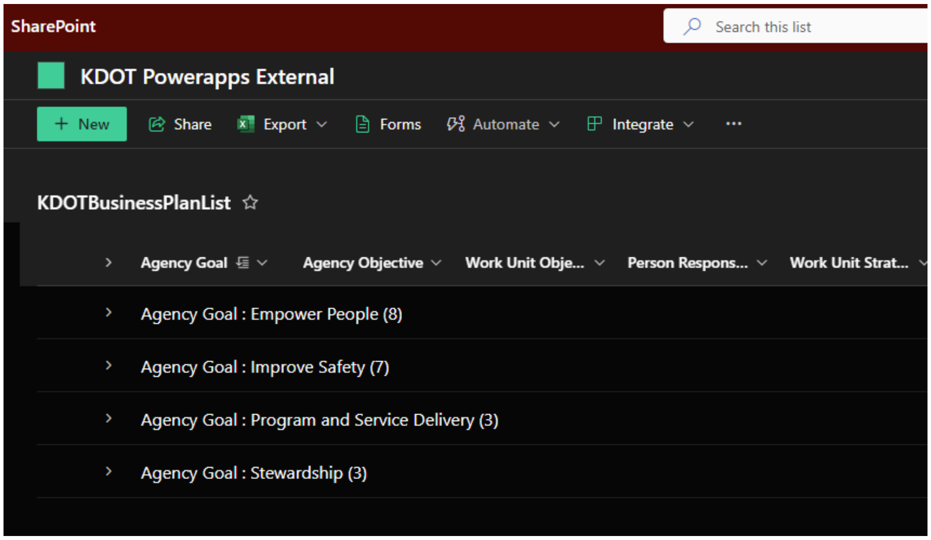
d. **Submit**: This will submit all the information entered and will bring the user to a new page letting the user know that the submission was successful. This new page will contain a “Submissions” button. When clicked, users will be sent to a SharePoint List where they can view any business plans that they submitted.

Access Business Plan Submission(s)

Through the Business Plan SharePoint List, users can review their submitted Work Unit Business Plans by clicking here or through the “View or Edit Submissions” link on the Business Plan Portal home page under resources.

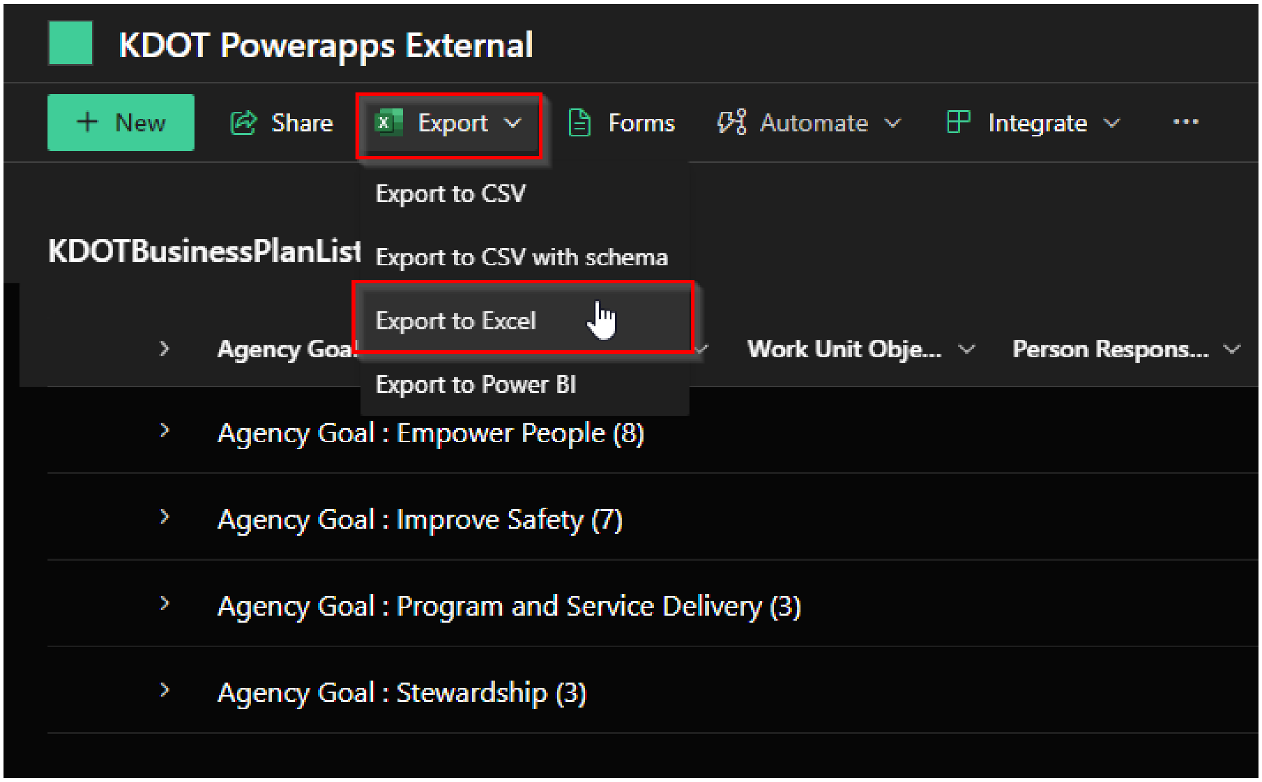
The list is automatically curated to show only submitted business plans tied to the submitting user’s KDOT email address. Users can only see and edit Business plans that they submitted.

The list is organized by the Agency Goal the plans were submitted for.



Exporting Business Plans as an Excel File

Users can export their Business Plan Lists as an Excel File by clicking “Export” and selecting “Export to Excel”:



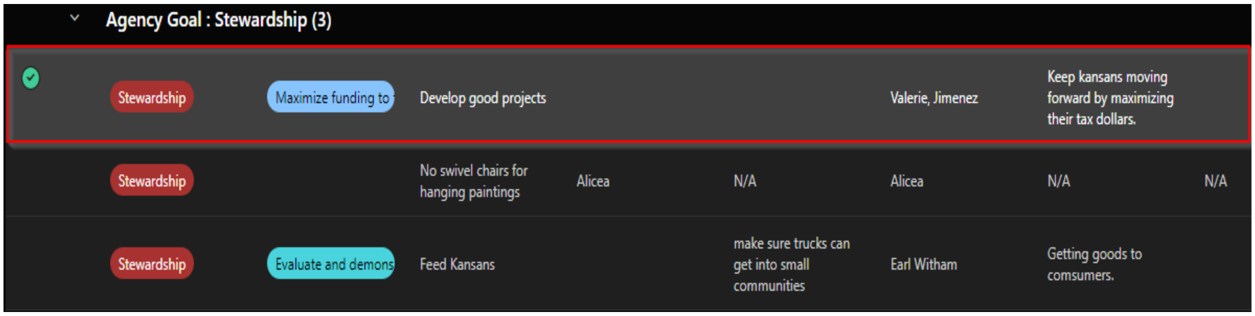
Edit Business Plan Submission(s)

Users can edit and update their submitted Work Unit Business Plans by accessing their Business Plan Sharepoint List. The list is automatically curated to show only submitted business plans tied to the submitting user's KDOT email address.

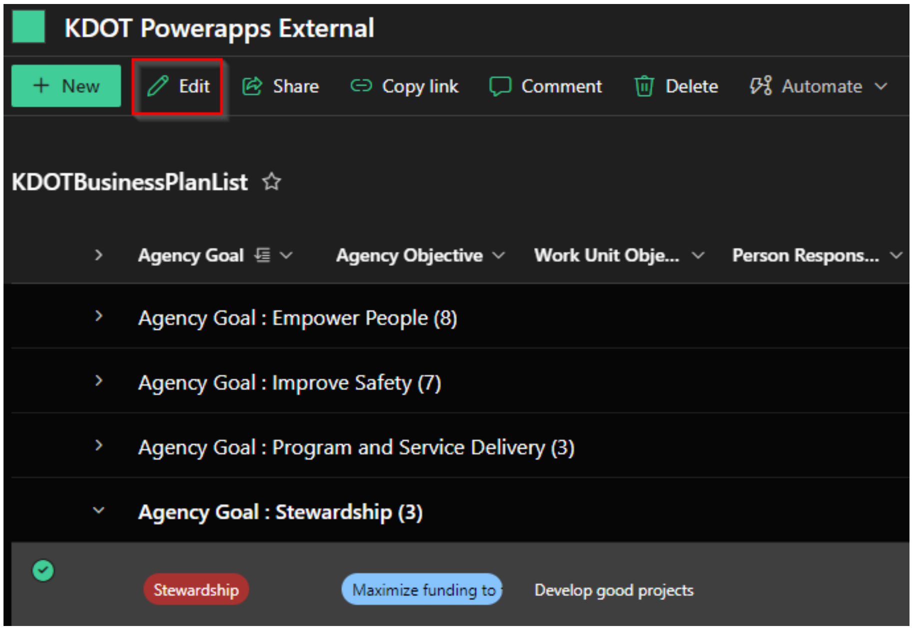
To edit Submitted Business Plans:

1. Access the Business Plan SharePoint List.

2. Click the submission you want to edit.

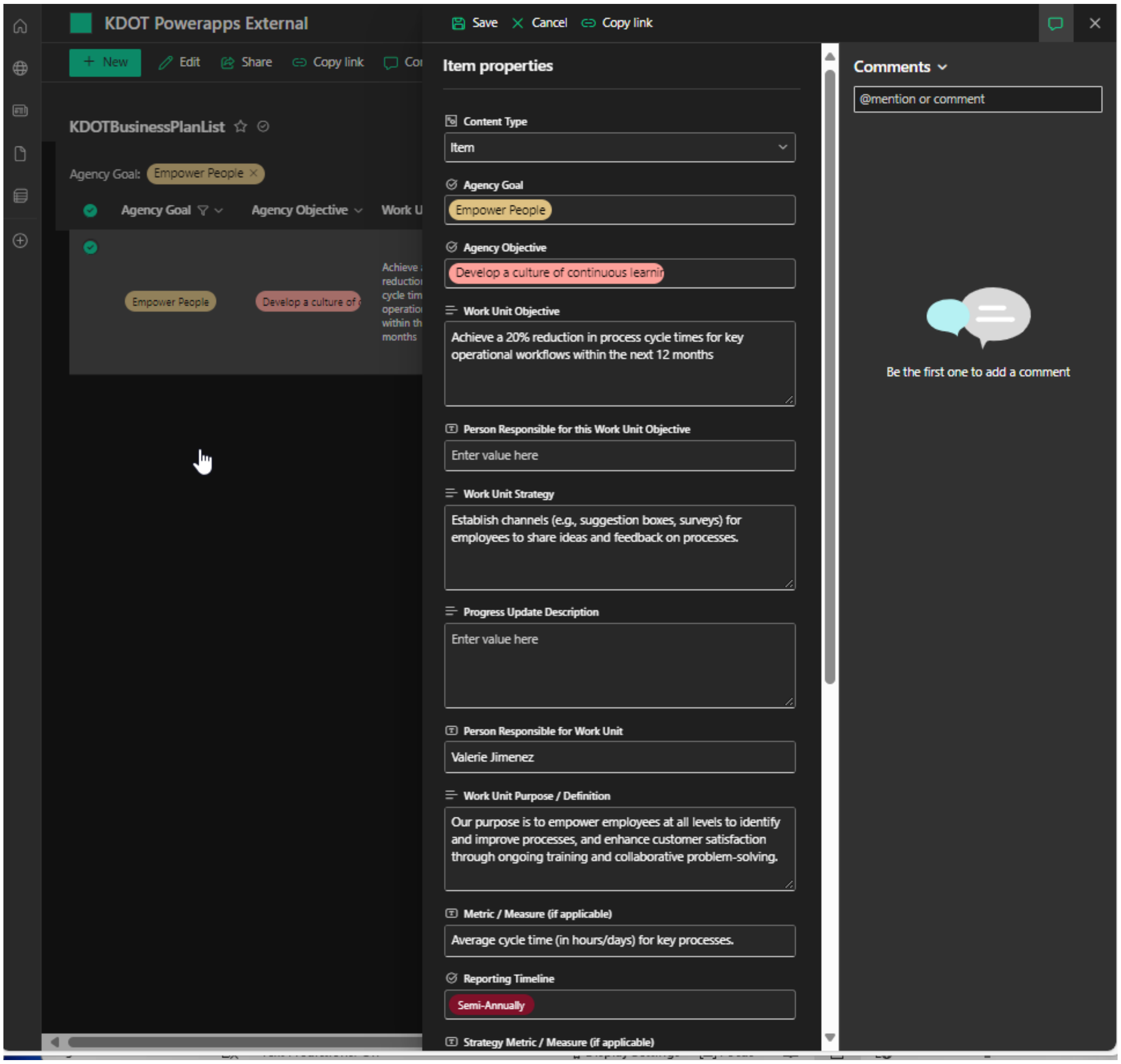


3. Access the Edit screen by either:
   a. Clicking EDIT at the top of the page.



   b. Double clicking the submission, you want to edit.

4. The list will appear on the page, for you to edit or to give feedback to.



5. Go to the fields you would like to edit or make updates too.

6. Once fields have been updated, the SharePoint List will also automatically update with the new information.