

STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)

QUARTERLY PERFORMANCE REPORT

A Guide for ALL Agencies

Welcome to STAARS Budgeting! STAARS Budgeting is the system of record for budgeting for the State of Alabama. The Quarterly Performance Reporting (QPR) application is to be used by state agencies as a tool for planning and documenting performance. It is required that each state agency input a minimum of one goal and one performance objective. As directed in Section 41-19-11 of the Budget Management Act (Code of Alabama 1975), each state agency/department is required to submit a performance report. These requirements will be accomplished through Performance Budgeting. This guide will walk users through the process of inputting annual and quarterly data.

To Access STAARS Budgeting on the Internet:

Access to two different areas of STAARS will be required. The QPR data will be completed in the STAARS Performance Budgeting application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the QPR report generated in the application. Please contact STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov for access.

To access Performance Budgeting (PB) <https://budget.staars.alabama.gov>

To access reports in infoAdvantage <https://infoadv.staars.alabama.gov/BOE/BI>

Agencies with access to STAARS Financials should access infoAdvantage through Financials.

Please contact STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov for login or password assistance.

Mission, Vision, Goals and Performance Measures

Inputting initial data (Mission-Vision-Goals-Objective-Targets) into QPR reports is required for each new fiscal year.

The EBO recommends reviewing the mission, vision and goals performance measures for accuracy. Changes should only be made at the beginning of the fiscal year when setting up the initial data. If the department decides to make changes to either the mission, vision, goals, or performance measures (targets) make notes and contact your budget analyst.

I. MISSION/VISION

Step 1. Under the **Reference Data** category, select **Performance Budgeting**.

The screenshot shows the CGI Advantage interface. The top navigation bar includes 'Reference Data', 'SBFS', 'Projection/Allocation', 'Security', 'Utilities', 'Budget Tasks', 'Dashboards', and 'Integration'. Below this, a breadcrumb trail reads 'Site Map > Advantage Performance Budgeting'. The main content area is titled 'Advantage Performance Budgeting' and is divided into two columns. The left column contains a list of categories: 'Reference Data', 'SBFS', 'Consolidations', 'Dimensions', 'Budget Forms', 'Performance Budgeting', 'Budget Ranking', 'Queries', and 'Workflow'. The right column contains descriptions for 'Reference Data', 'SBFS', 'Positions, Employees and Assignments', 'Benefits and Supplemental', 'Class, Category and Other', 'Salary Tables', 'Salary Projections', 'Utilities', and 'Budget Tasks'. Two red arrows point to the 'Reference Data' and 'Performance Budgeting' links in the left column.

Step 2. From the **Performance Budgeting** screen, select **Performance Missions**.

The screenshot shows the CGI Advantage interface. The top navigation bar includes 'Reference Data', 'SBFS', 'Projection/Allocation', 'Security', 'Utilities', and 'Budget Tasks'. Below this, a breadcrumb trail reads 'Advantage Performance Budgeting > Reference Data > Performance Budgeting'. The main content area is titled 'Performance Budgeting' and is divided into two columns. The left column is empty. The right column is titled 'Pages' and contains a list of links: 'Performance Missions', 'Performance Goals', 'Performance Objectives', 'Performance SubObjectives', 'Annual Performance Goals', 'Performance Measure Type Maintenance', and 'Performance Plans'. A red arrow points to the 'Performance Missions' link.

The **Performance Missions Maintenance** screen will appear.

Step 3. In the **Code** field enter the **Department 3-digit number** (include the asterisk). Click **Search**.

Performance Missions Maintenance

Code: Name:

Display

Item Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#)

Step 4. Select the code for your department to review the information in the performance hierarchy. Click **VIEW** or **EDIT** (for changes).

Performance Missions Maintenance

Code: Name:

Display

| <input type="checkbox"/> | Code | Name |
|--------------------------|-------------|----------------------------------|
| <input type="checkbox"/> | 069-MISSION | Alabama Community College System |

Step 5. Click **VIEW** or **EDIT** to verify the **security organization**, **name** and **short name**.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾

Advantage Performance Budgeting > Reference Data > Performance Budgeting >

Performance Mission View Documentation

[Expand All](#) | [Collapse All](#)

Performance Mission Basic Information ⓘ

* Code:

* [Security Organization](#): ⓘ


Name:

Short Name:

Description:

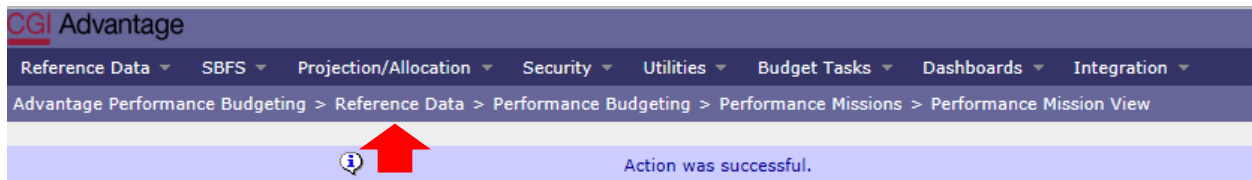
Initiator:

Step 6. Under the **Performance Mission Detail Information** section, edit the Mission and Vision of the department only if necessary. The Mission and Vision are in the same location, continue scrolling down until you see the Vision statement.

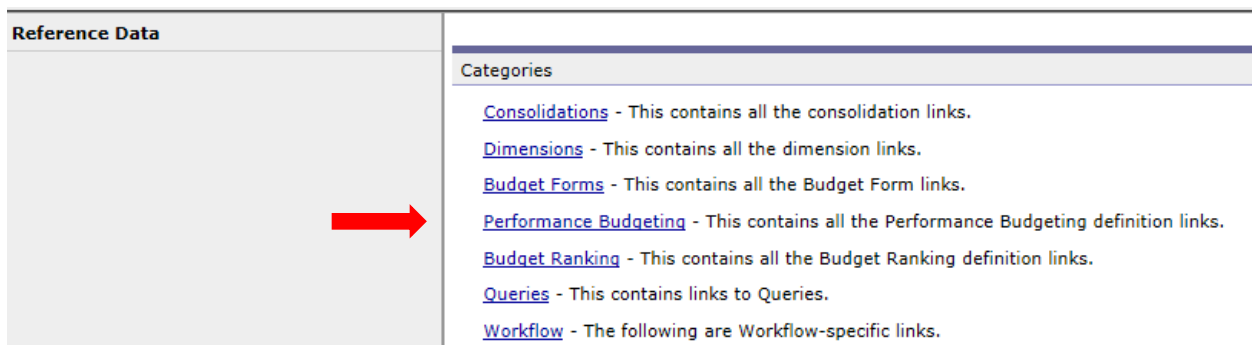
Step 7. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

II. GOALS

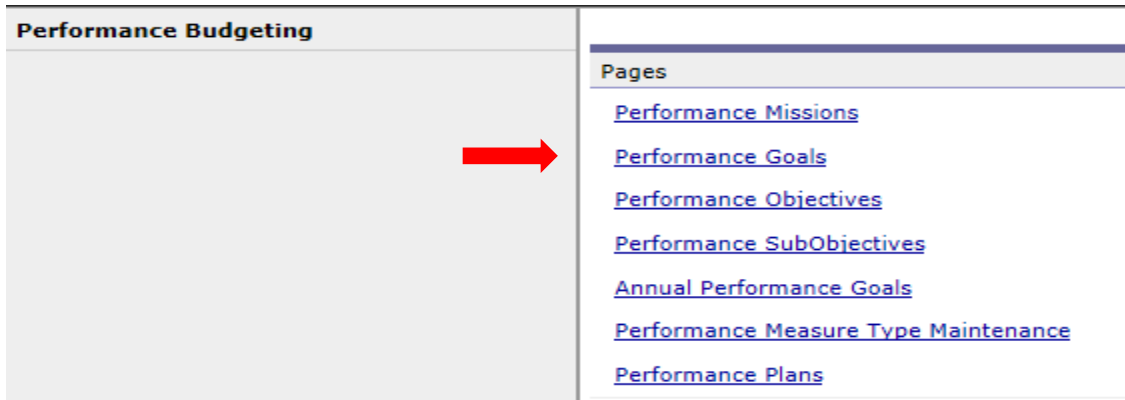
Step 8. Using the thread (or bread crumb trail), return to the **Reference Data** screen.



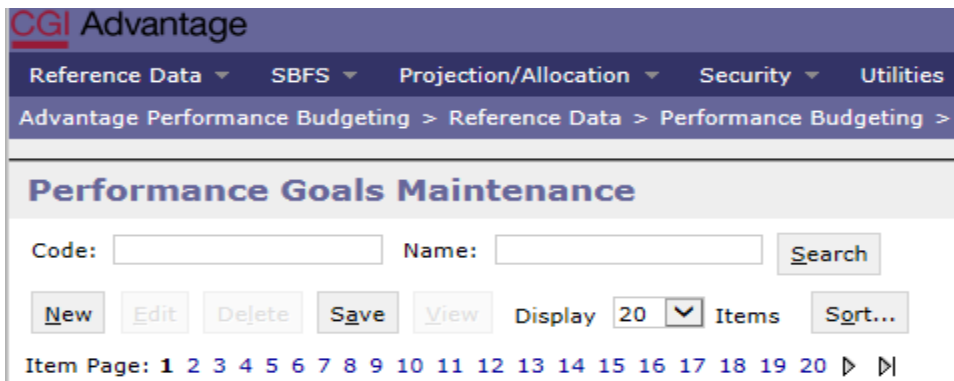
Step 9. Select **Performance Budgeting** under the Categories section. The **Performance Budgeting** Screen will appear.



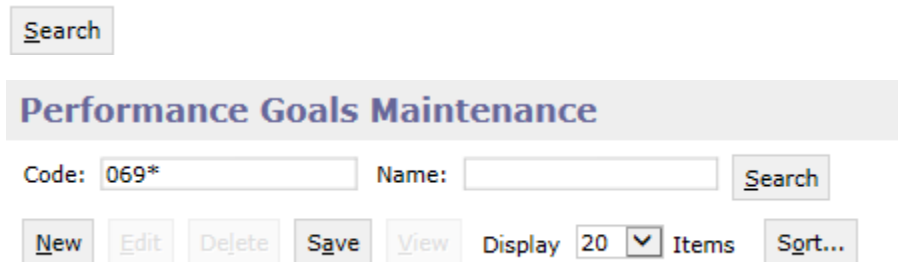
Step 10. From the **Performance Budgeting** screen, select **Performance Goals**.



The **Performance Goals Maintenance** screen will appear.



Step 11. In the **Code** field enter the **3-digit Department number** (include the asterisk). Click **Search**.



Step 12. Select the code for your department to review the information in the performance hierarchy. Click **VIEW** or **EDIT** (for changes).

Performance Goals Maintenance

Code: Name:

Display

| <input type="checkbox"/> | Code | Name |
|--------------------------|--------------|--|
| <input type="checkbox"/> | 069-GOAL-001 | Provide a Skilled Workforce |
| <input type="checkbox"/> | 069-GOAL-002 | Increase the number of individuals served in Adult Education |
| <input type="checkbox"/> | 069-GOAL-003 | Conduct Peer Reviews |

Step 13. Click **VIEW** or **EDIT** to verify the **security organization, name, short name** and **description**.

Performance Goal View | Performance Allocations | Milestones | Documentation

[Expand All](#) | [Collapse All](#)

Basic Information

* Code:

* Security Organization:

Name:

Short Name:

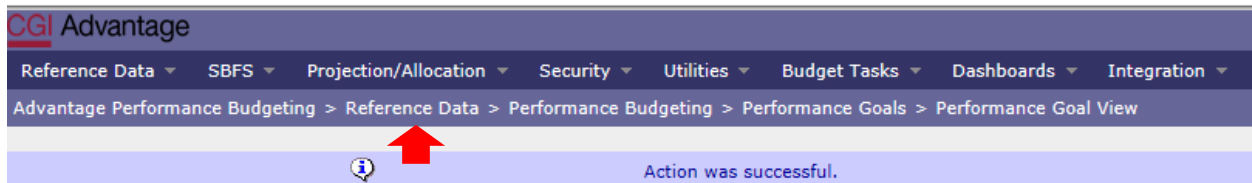
Description:

Initiator:

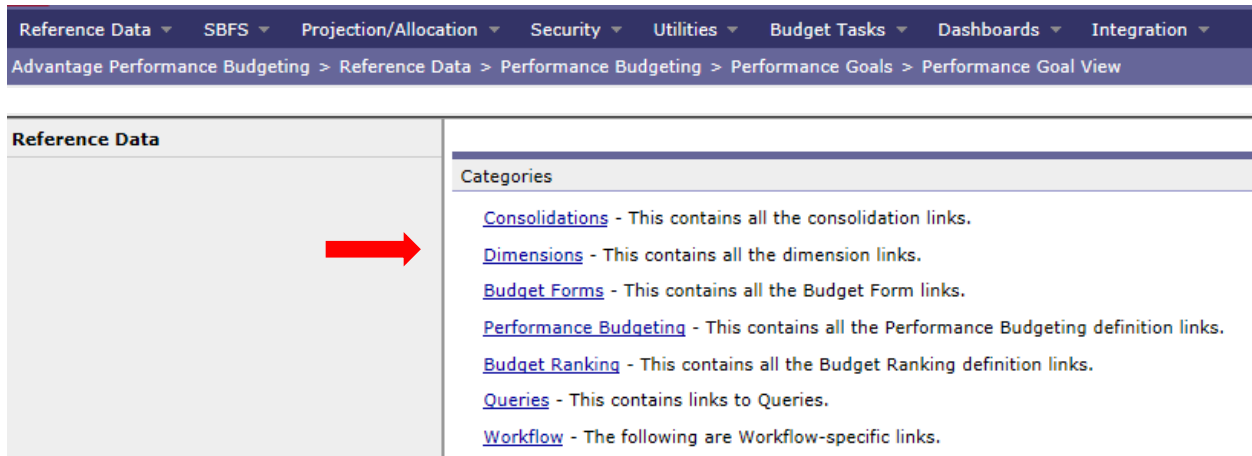
Step 14. Once complete, click **Save** at the top of the page. The **Action was Successful** message will appear.

III. PERFORMANCE PLANS

Step 15. Using the thread (or bread crumb trail), return to the **Reference Data** screen.

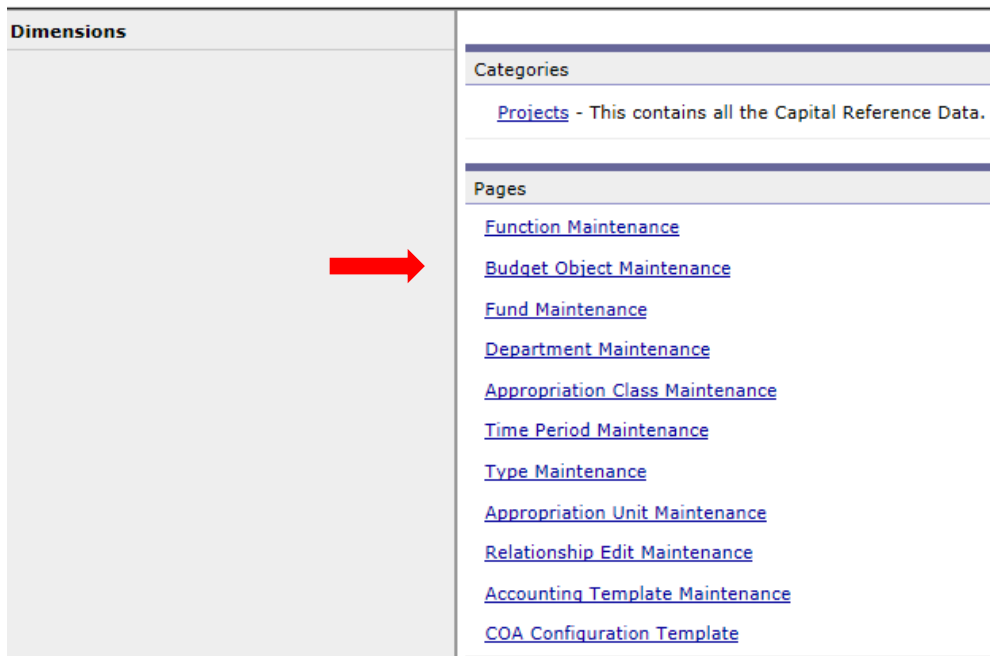


Step 16. Select **Dimensions** under the Categories section.



The **Dimensions** screen will appear.

Step 17. From the **Dimensions** screen, select **Budget Object Maintenance**.



The **Budget Object Maintenance** screen will appear.

Budget Object Maintenance

Code: Name: Short Name: Element Type: Object Type:

Usage: Postable: Parent Budget Object:

Itemization Type:

Display Items

Step 18. In the **Budget Object Maintenance** screen, enter the department code (include the asterisk). Also, use the drop down arrow in the **Object Type** box to select **Performance Measure**. Click **Search**.

The **Performance Measure(s)** from prior year will be listed.

Performance Goals Maintenance

Code: Name:

Display Items

| <input type="checkbox"/> | Code | Name |
|-------------------------------------|--------------|--|
| <input checked="" type="checkbox"/> | 069-GOAL-001 | Provide a Skilled Workforce |
| <input type="checkbox"/> | 069-GOAL-002 | Increase the number of individuals served in Adult Education |
| <input type="checkbox"/> | 069-GOAL-003 | Conduct Peer Reviews |

Step 19. Select the code for your department to review the information in the performance hierarchy. Click **VIEW**. Contact EBO for edits.

Budget Object Maintenance

Code: Name: Short Name: Element Type: Object Type:

Usage: Postable: Parent Budget Object:

Itemization Type:

Display Items

| <input type="checkbox"/> | Code | Name | Short Name | Element Type | Object Type |
|-------------------------------------|--------|---|-----------------|--------------|---------------------|
| <input checked="" type="checkbox"/> | 069-01 | Incrs Number of Students Who Earn A Short-Term Or Long-Term | Incr # of Certi | Object | Performance Measure |
| <input type="checkbox"/> | 069-02 | Incrs The Number of Individuals Served In Adult Education. | Incr # serv adu | Object | Performance Measure |
| <input type="checkbox"/> | 069-03 | Conduct Peer Reviews at 12 Accs Institutions | Conduct peer re | Object | Performance Measure |

Step 20. The screen will appear with details of the performance measure. Review and edit the name, short name, and description. **DO NOT CHANGE the Security Organization.** Contact EBO for edits.


| | | | | |
|---------------------------|-------------------------|------------|---------------|---------------------|
| Edit Budget Object | Performance Allocations | Milestones | Documentation | Document Management |
|---------------------------|-------------------------|------------|---------------|---------------------|

[Expand All](#) | [Collapse All](#)

Dimension Information ⓘ

| | | | |
|--------------------------|--|-------------------|-------------------------------------|
| * Code: | 069-01 | * Element Type: | Object |
| Name: | Incrs Number of St: x | Active: | <input checked="" type="checkbox"/> |
| * Security Organization: | DEPT-069 | Postable: | <input checked="" type="checkbox"/> |
| Short Name: | Incr # of Certi | * Usage: | Coded |
| Description: | Increase number of short-term or long-term certificates, degrees, or | * Object Type: | Performance Measure |
| <i>Fiscal Period</i> | | Itemization Type: | |
| Fiscal Year: | Start Date: | End Date: | Decimal Precision: 0 |

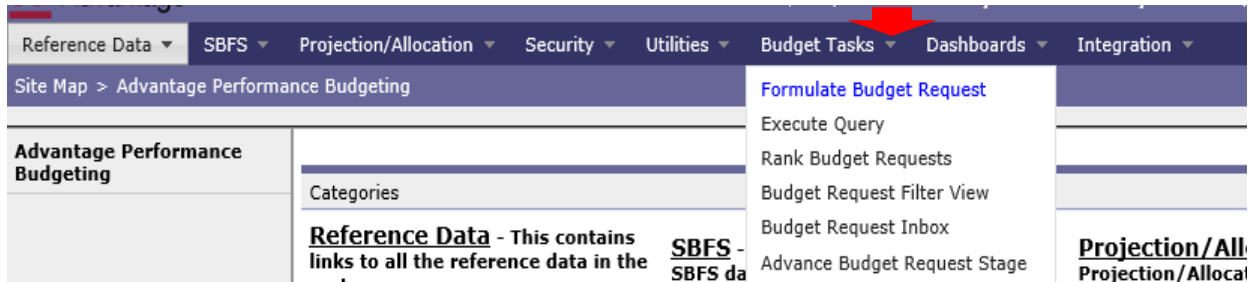
If additional performance measures need to be added, contact the EBO. We will walk you through the process of creating new goals and/or measures.

Step 21. Once complete, click [Save](#)  at the top of the page. The **Action was Successful** message will appear.

Quarterly Performance Report (Targets)

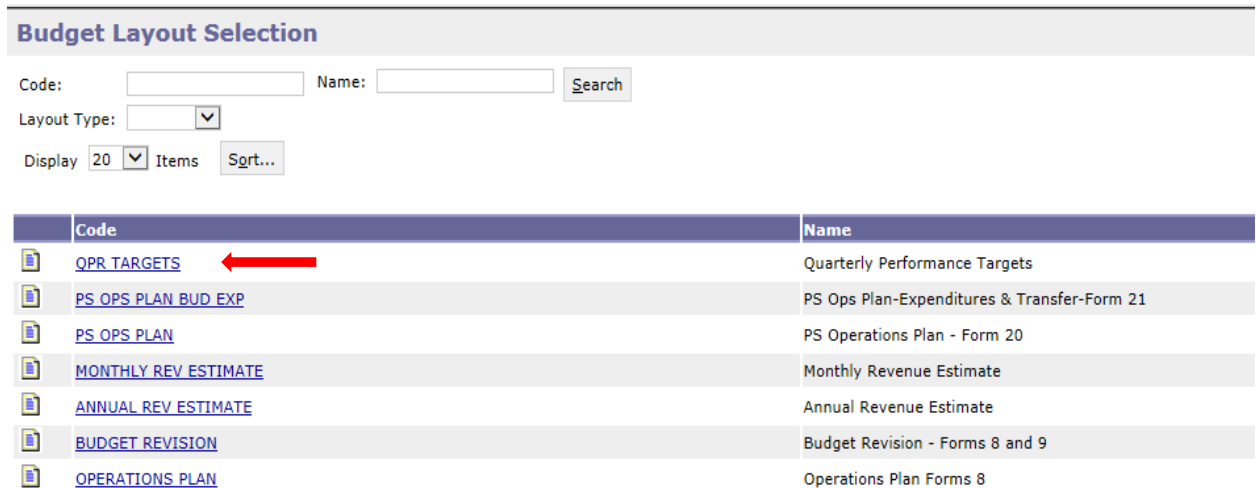
IV. TARGETS

Step 1. Using the tool bar, click on **Budget Task**, then click **Formulate Budget Request** from the dropdown menu.

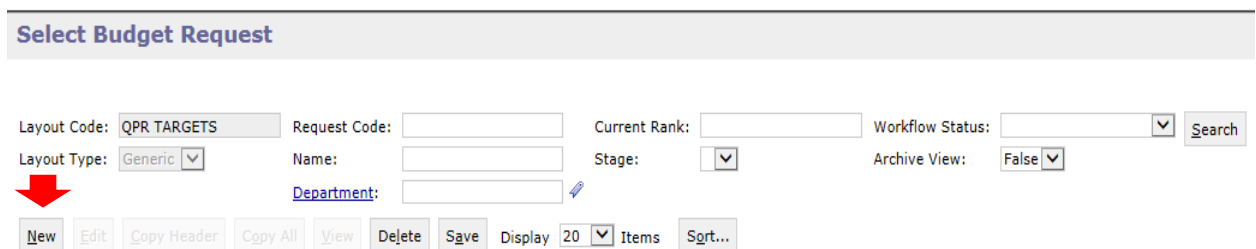


The **Budget Layout Selection** screen will appear.

Step 2. From the **Budget Layout Selection** screen, select **QPR Targets**.



The **Select Budget Request** screen will appear.



Step 3. Click **NEW** to create your targets. The Header page will appear.

CGI Advantage

Save Back

Create Budget Request

[Expand All](#) | [Collapse All](#)

Budget Request Details ⓘ

* Request Code: * Name:

* Stage: Ranking Type:

Description:

Budget Request Information

Dimensions ⓘ

Department:

Step 4. Complete the required fields in the **Budget Request Details** section by entering your agency information for the Form 8 as follows:

Enter the **Request Code** and the **Name** using the following format for both:

REQUEST CODE EXAMPLE: 069 QPRT 2018

DEPARTMENT NUMBER: 069

QPRT

CURRENT FISCAL YEAR: 2018

NAME: 069 QPRT 2018

DEPARTMENT NUMBER: 069

QPRT

CURRENT FISCAL YEAR: 2018

CGI Advantage

Save Back

Create Budget Request

[Expand All](#) | [Collapse All](#)

Budget Request Details ⓘ

* Request Code: 069 QPRT 2018 * Name: 069 QPRT 2018

* Stage: 1

Description:

Ranking Type: ⓘ


Ranking Type:

Budget Request Information

Dimensions ⓘ

Department: 069 ⓘ

Step 5. Be sure to provide the **Department** number in the **Dimensions** section at the bottom of the header page.

Step 6. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

CGI Advantage

Action was successful.

Save Back

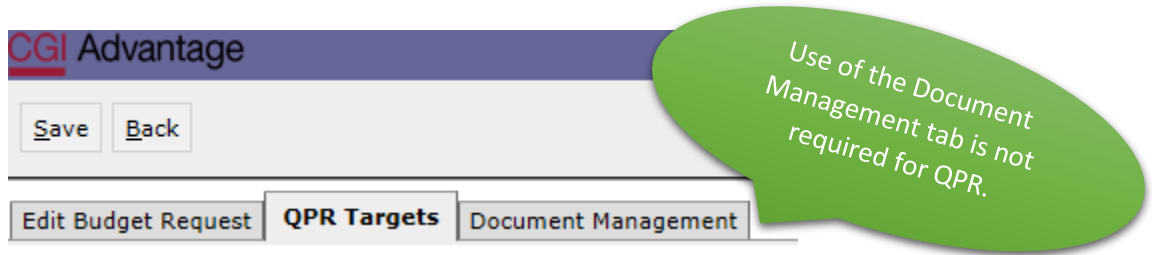
Edit Budget Request | QPR Targets | Document Management

Notify

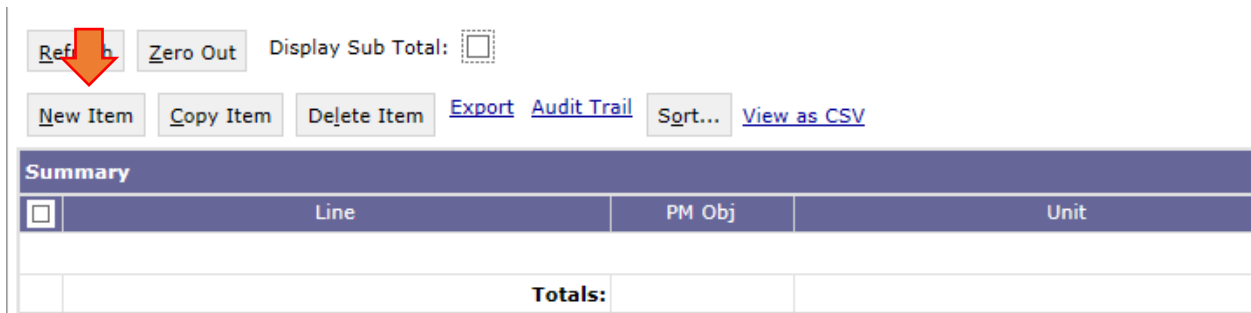
Supplementary tabs will emerge that will allow you to enter the quarterly and annual targets for each performance measure. The tabs are: **QPR Targets** and **Document Management**.

NOTE: There is no need to use the Document Management tab within Performance Measures. Documents (reports) will always be attached to an Operations Plan, Budget Request or Revision as a

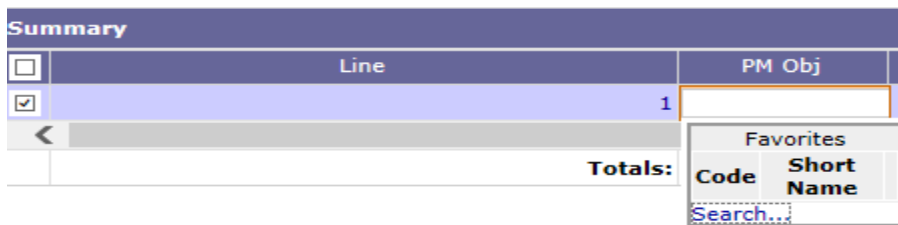
PDF. Since QPR does not move through workflow, if you chose to add documents to the Document Management tab, this would be a quick agency review before starting each quarterly report.



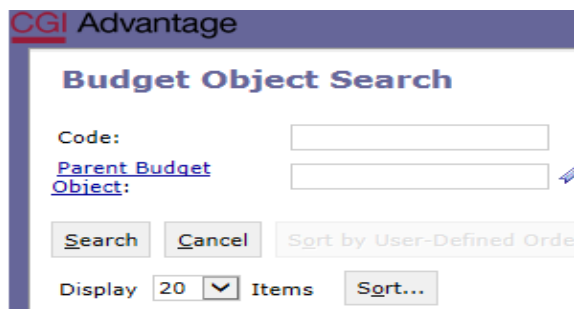
Step 7. Click **New Item** to create a new target. Use the first line to begin entering the data.




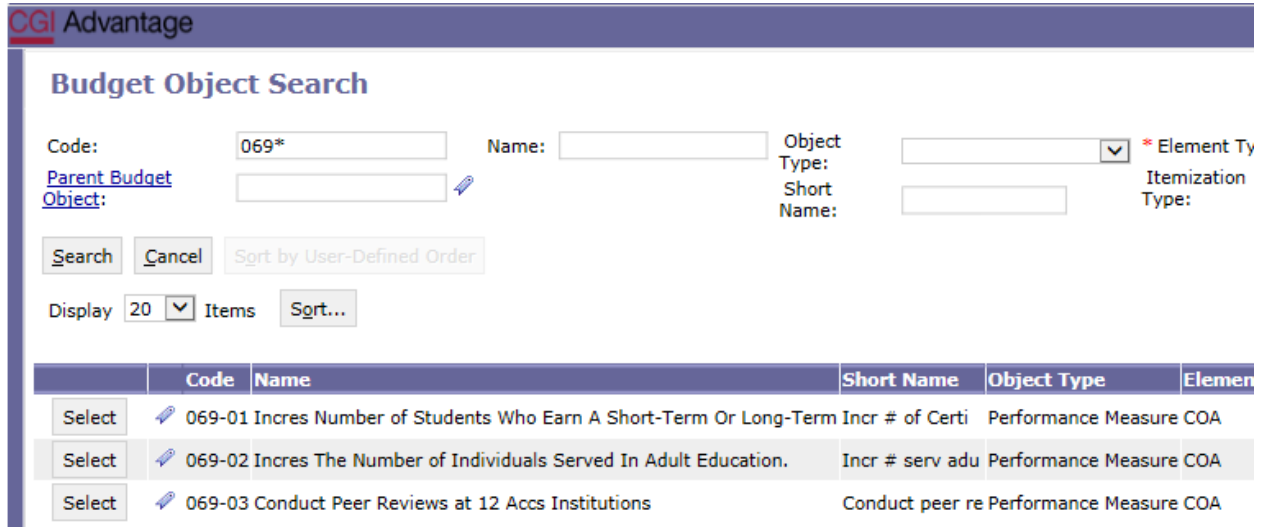
Step 8. Begin with the **PM Obj** section. **Right click** in the field to search for the targets that preexist for the department.




The **Budget Object Search** screen will appear.



Step 9. Click **Search** again for the list of targets to appear. Click **Select**  for the target(s) to add on the beginning of the year QPR report.



Budget Object Search

Code: Name: Object Type: * Element Ty
 Parent Budget Short Name: Itemization Type:
 Object: 


Display Items

| | Code | Name | Short Name | Object Type | Elemen |
|---------------------------------------|--------|---|-----------------|---------------------|--------|
| <input type="button" value="Select"/> | 069-01 | Incrs Number of Students Who Earn A Short-Term Or Long-Term Incr # of Certi | Incr # of Certi | Performance Measure | COA |
| <input type="button" value="Select"/> | 069-02 | Incrs The Number of Individuals Served In Adult Education. | Incr # serv adu | Performance Measure | COA |
| <input type="button" value="Select"/> | 069-03 | Conduct Peer Reviews at 12 Accs Institutions | Conduct peer re | Performance Measure | COA |

Step 10. Once the target is selected, the screen will return to the main screen allowing agencies to input the quarterly targets across **Quarter 1, Quarter 2, Quarter 3, and Quarter 4**. **NOTE:** The system will not automatically calculate the Annual Target column. You will need to enter the Annual Target total as well.

| PM Obj | Unit | Quarter 1 Target | Quarter 2 Target | Quarter 3 Target | Quarter 4 Target | Annual Target |
|--------|------------|------------------|------------------|------------------|------------------|---------------|
| 069-01 | Percentage | | | | | 5 |
| 069-02 | Percentage | | | | | 5 |
| 069-03 | Number | | | | | 12 |
| | | 0 | 0 | 0 | 0 | 22 |

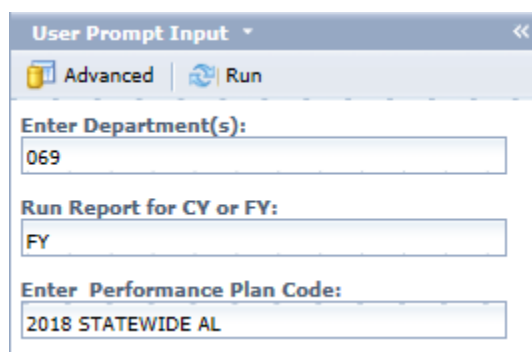
Continue by entering as many targets desired for the department to report quarterly performance indicators. (The example provided is an agency with one target).

Step 11. Once all targets have been included, click **Save**  at the top of the page. The **Action was Successful** message will appear.

SUBMISSION OF QUARTERLY PERFORMANCE REPORTS TO THE EXECUTIVE BUDGET OFFICE

Annual Fiscal Year Operations Plan Submissions

The Quarterly Performance Report, ABUD-QPR-001, should be generated in CGI infoAdvantage. Once the report is created, please print a copy of the report and review the data for completeness and accuracy. Return to the Operations Plan-Form 8 in Performance Budgeting (PB) and attach the finalized QPR report as a PDF to the Document Management tab along with other documents required for submission of the annual Operations Plan. Annual Operation Plans will not be approved without the submission of the annual QPR goals and targets.



The screenshot shows a 'User Prompt Input' dialog box with the following fields and values:

- Enter Department(s): 069
- Run Report for CY or FY: FY
- Enter Performance Plan Code: 2018 STATEWIDE AL

PROMPTS:

1. Enter Department(s) Number: 3-digit Agency Number
2. Run Report for CY or FY:
 - a. For annual reporting input FY (Future Year) in the prompt.
 - b. For quarterly reporting input CY (Current Year) in the prompt.
3. Enter Performance Plan Code: Prepopulates

Quarterly (4) Submissions throughout the Fiscal Year

EBO will continue to send out reminders when it's time for agencies to input quarterly targets. The application will be open for 30 days after each quarter ends. Agencies should log into PB to report actuals at the end of each quarter.

Once the Quarterly Performance Report, ABUD-QPR-001, report is generated please print a copy of the report and review the data for completeness and accuracy. Send your budget analyst a courtesy email notifying them that the Quarterly data has been completed. DO NOT click Submit and move QPR through workflow. At the end of the quarter EBO will access all agency reports to create a statewide report that will be posted to our website.

Below is an example of a completed Quarterly Performance Report at the beginning of the Fiscal Year.

| | |
|----------------------------|------------------------------|
| Report ID: STAARS-QPR-0001 | State of Alabama |
| Report Date: 5/30/17 | Quarterly Performance Report |
| Report Time: 11:51:25 AM | Fiscal Year 2018 |

Cover Page

Parameters and Prompts

Department(s): 069
CY or FY: FY
Performance Plan: 2018 STATEWIDE AL

Report Description

This report will display the performance targets and corresponding year-to-date actual information for an agency. The report will also display the mission, vision, and goals established by the agency. This report will be run on demand by regular agency, postsecondary institution, and EBO users, primarily during the operations plan cycle (June 1 – September 1). This report will also be run quarterly by agency and EBO users, coinciding with the recording of quarterly actuals.

Department: 069 - Ala Community College System

Mission: The Alabama Community College System has direct responsibility to the Alabama Community College System Board of Trustees for the direction and supervision of educational programs and services provided by the Alabama Community College System. The System Office provides leadership, service, and regulatory functions for the member institutions of the Alabama Community College System to ensure educational accessibility, excellence and equity for all citizens of Alabama.

Vision: To develop an educated, prosperous population by providing an affordable pathway to help citizens of any walk or stage of life to succeed through quality education and training; a community college system where education works for all.

Annual Goals

| | |
|----|---|
| 01 | Provide a skilled workforce for Alabama's existing industries in targeted occupational sectors. |
| 02 | Increase the number of individuals served in Adult Education programs. |
| 03 | Conduct peer reviews at ACCS institutions; identify best practices, efficiencies & opportunities. |

Quarterly Objectives and Targets

| | Unit of Measure | Goal | First Quarter | | | Second Quarter | | Third Quarter | | Fourth Quarter | | Annual | |
|----|---|------------|---------------|--------|--------|----------------|--------|---------------|--------|----------------|--------|--------|---|
| | | | Target | Actual | Target | Actual | Target | Actual | Target | Actual | Target | Actual | |
| 01 | Increase number of students who earn a short-term or long-term certificate, degree, or an industry recognized credential. | Percentage | 01 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 0 |
| 02 | Increase the number of individuals served in Adult Education. | Percentage | 02 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 0 |
| 03 | Conduct peer reviews at two ACCS institutions will identify best practices, efficiencies, and opportunities for improvements. | Number | 03 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 0 |