

STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)
BUDGET REQUEST MANUAL
FOR STATE AGENCIES

Welcome to STAARS Budgeting! STAARS Budgeting is the new system of record for budgeting for the State of Alabama. State agencies will continue to complete budget request forms 1, 3, 5, and 6 using different forms and tabs within STAARS Budgeting. These forms will be rolled up to create the department Budget Request Packet that will be submitted to the Executive Budget Office through electronic workflow.

BUDGET REQUEST FORMS

- Form 5 – Agency Program Summary
Prior Year Actuals/Current Year Budget/Agency Budget Request
- Form 2 – Summary Budget Request (system generated)
- Form 6 – Personnel Classification
- Form 3 – Capital Expenditures
- Form 1 – Estimated Condition of Funds
- Increase/Decrease Worksheet (partially system generated)

Note: Form 2-Summary Budget Request will be generated by STAARS Budgeting after all other forms have been completed. The Increase/Decrease worksheet will be partially completed by the system. Agencies will need to insert the details for each line. Additional details are included in these instructions.

To Access STAARS Budgeting on the Internet:

STAARS Budgeting has a separate login URL and screen than STAARS Financials or STAARS Reporting. Access to two different areas of STAARS will be required. Budget Request forms will be completed in the STAARS Budgeting application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the reports (Budget Request Packet) generated in the application. Please contact your Agency Implementation Lead (AIL) for login credentials or STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov.

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

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

Additional instructions for navigation and browser setup can be accessed at

<http://staarstraining.alabama.gov/staars1050/STAARS1050.pdf>

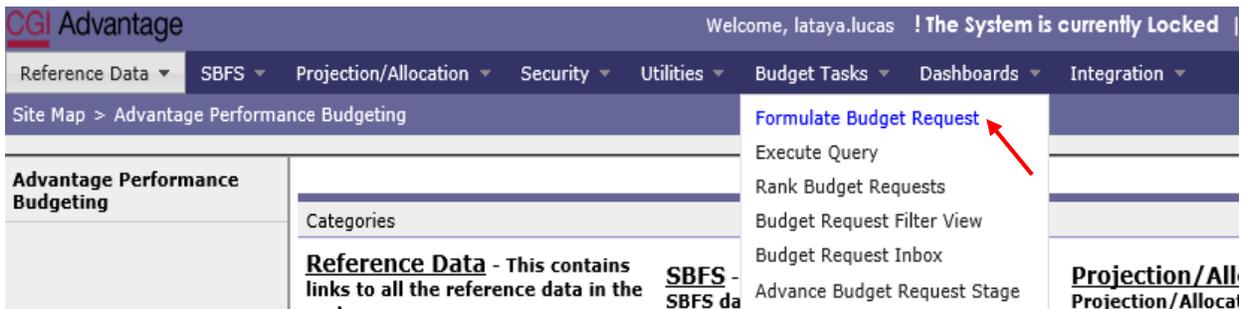
This link will provide step-by-step instructions to assist you with navigating the STAARS Budgeting Interface, browser preferences such as turning off pop-up blockers and allowing downloadable files. The link will also help users add the STAARS Budgeting to My Favorites for easier access.

STAARS STATEWIDE BUDGET REPORTS

<u>STAARS Report ID</u>	<u>FUNCTIONAL AREA</u>
AFIN-AR-001	Revenue Summary Report (Formerly A203)
AFIN-BUD-001	Allotment Report (Formerly B10T)
AFIN-BUD-002	Appropriation Report (Formerly B12T)
AFIN-BUD-004	Budget Management Report (Formerly P441/P440/P442)
AFIN-BUD-005	Allotment Management Report (Formerly EALL Screen)
AFIN-BUD-010	Agency Obligations vs. Exp Budget, Appropri and Allotments (Formerly A501)
AFIN-BUD-013	Operations Plan (Formerly P421)
AFIN-CASH-001	Cash Reconciliation Report (Formerly C115)
AFIN-CASH-002	Budgetary Fund Balance Report (Formerly C110)

HEADER PAGE

After you login, you will be on the **Welcome Page** for the application. You will begin by clicking the down arrow next to **Budget Tasks** on the task bar. Then select **Formulate Budget Request** on the dropdown menu.



The **Budget Layout Selection** screen will appear. This screen will be used several times during the preparation of your department's Budget Request. Notice the code names used to identify forms 5, 6, 1 & 3 which will be used during the process.

Forms 5 & 6

BUD REQ BY FUNCTION

Forms 1 & 3

BUD REQ BY DEPT

Note: Form 2-Summary Budget Request will be generated by STAARS Budgeting after all other forms have been completed.

Increase/Decrease worksheets will be partially completed by the system. Agencies will insert the details for each line. Additional instructions are included further in these instructions.

FORMS 5 & 6 – BUD REQ BY FUNCTION

The following steps will be completed several times if you prepare multiple Form 5's.

Step 1. Select [BUD REQ BY FUNCTION](#) under the Code section to begin creating Form 5 for each function (formerly activity).

Code	Name
BUD REQ BY FUNCTION	Budget Request- Forms 5 & 6
QPR TARGETS	Quarterly Performance Targets
PS OPS PLAN BUD EXP	PS Ops Plan-Expenditures & Transfer-Form 21
PS OPS PLAN	PS Operations Plan - Form 20
BUD REQ BY DEPT	Budget Request- Department level- Forms 1 & 3
MONTHLY REV ESTIMATE	Monthly Revenue Estimate
QPR Q1 ACTUALS	Quarter 1 Performance Actuals
QPR Q2 ACTUALS	Quarter 2 Performance Actuals
QPR Q3 ACTUALS	Quarter 3 Performance Actuals
QPR Q4 ACTUALS	Quarter 4 Performance Actuals
ANNUAL REV ESTIMATE	Annual Revenue Estimate
PS BUD REQ E&G	PS Restricted & Unrestricted & E & G Budget Request-Form 14
PS BUD REQ AUXILIARY	PS Unrestricted Auxiliary Enterprises Bud Req - Form 14
PS BUD REQ PERSONNEL	PS Restricted & Unrestricted Personnel Bud Req-Form 17
PS BUD REQ HOSPITAL	Post Secondary Hospital Financial Summary Bud Req - Form 14A
BUDGET REVISION	Budget Revision - Forms 8 and 9
OPERATIONS PLAN	Operations Plan Forms 8

Step 2. On the [Select Budget Request](#) screen click [New](#).

Request Code	Name	Stage	Current Rank	Department	Fund	Appropriation Class
- NO ITEMS TO DISPLAY -						

The [Create Budget Request](#) screen will appear.

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: * Name:

* Stage:

Description:

Ranking Type:

Step 3. Complete the required fields in the **Budget Request Details** section by entering your agency information for the Form 5 Function (Activity) that you select to begin with as follows:

Request Code: (Example) 050 BR 0931 512 0237

Department Number: 3 Digits

BR: Enter the letters BR for Budget Request by Function

Fund: 4 digit fund number

Appropriation Class: 3 digits (formerly Appropriation Unit)

Function: 4 digits (formerly Activity code)

Name: (Example) Vet Assist Food – Agcy Admin

Enter the Fund Name & Function Name

Budget Request Details for the **Stage** field should always remain on the default setting '1'. **Description** and **Ranking Type** will remain blank.

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: 050 BR 0931 512 0237 * Name: Vet Assist Food - Agcy

* Stage: 1

Description:

Ranking Type:

Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field.

Dimensions

Department: **Appropriation Unit:**

Fund:

Function:

Appropriation Class:

[Go to top of page](#)

Step 5. Begin by clicking on [Department](#). The [Department Search](#) screen will appear. Click [Search](#) again and when the screen changes select the Department code specific to the agency.

CGI Advantage

Department Search

Code: Name: Short Name: * Element Type:

Postable: [Parent Department:](#)

Dimension Reference Information

[Department:](#)

Display Items

	Code	Name	Short Name	Element Type	Parent	Department
- NO ITEMS TO DISPLAY -						

Step 6. If the information in the search box appears in random order, use the button to arrange in ascending or descending order for any field: code, name, short name or element type.

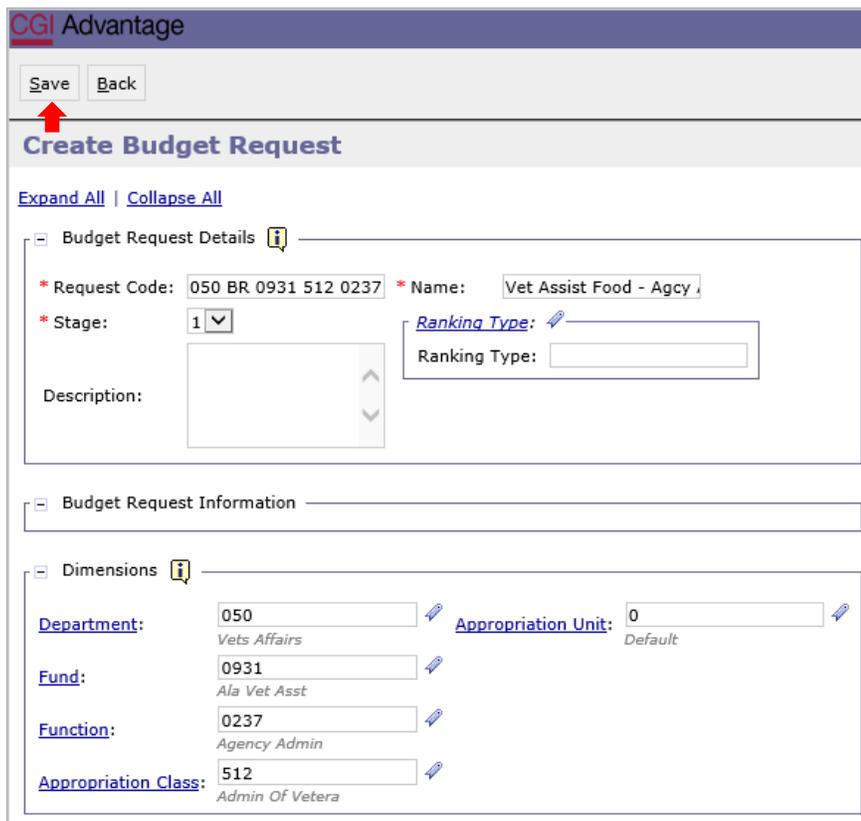
Display Items

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

	Code	Name	Short Name	Element Type
<input type="button" value="Select"/>	044	Personnel	Personnel	DEP
<input type="button" value="Select"/>	045	Public Library Services	Pub Library	DEP
<input type="button" value="Select"/>	046	Secretary Of State	Sec Of State	DEP
<input type="button" value="Select"/>	047	Supreme Court	Supreme Ct	DEP
<input type="button" value="Select"/>	048	Forensic Sciences	Forensic Sci	DEP
<input type="button" value="Select"/>	049	Treasurer	Treasurer	DEP
<input type="button" value="Select"/>	050	Veterans Affairs	Vets Affairs	DEP
<input type="button" value="Select"/>	051	Gen Fund-Direct Disbursements	Gf-Direct	DEP
<input type="button" value="Select"/>	052	Etf-Direct Disbursements	Etf-Direct	DEP

Step 7. Continue searching for each Dimension [Fund](#), [Function](#), [Appropriation Class](#) and [Appropriation Unit](#) until all fields have been entered.

Step 8. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.



CGI Advantage

Save **Back**

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: 050 BR 0931 512 0237 * Name: Vet Assist Food - Agcy

* Stage: 1

Description:

Ranking Type:

Ranking Type:

Budget Request Information

Dimensions ⓘ

Department: 050 *Vets Affairs*

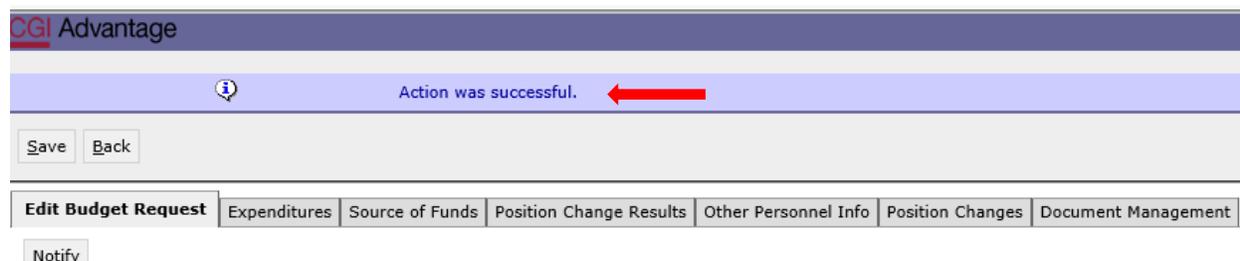
Fund: 0931 *Ala Vet Asst*

Function: 0237 *Agency Admin*

Appropriation Class: 512 *Admin Of Vetera*

Appropriation Unit: 0 *Default*

Supplementary tabs will emerge that will allow you to enter the department data for Forms 5 and 6. The tabs are: **Expenditures**, **Source of Funds**, **Position Change Results**, **Other Personnel Info**, **Position Changes**, and **Document Management**.



CGI Advantage

Action was successful. 

Save **Back**

Edit Budget Request | **Expenditures** | **Source of Funds** | **Position Change Results** | **Other Personnel Info** | **Position Changes** | **Document Management**

Notifv

EXPENDITURES TAB



Step 1. Select the **Expenditures** tab.

Numerical data for the Prior Year Actuals and Current Year Budget will pre-populate once the tab is opened. **The PY1 Actuals** column cannot be changed. The **CUR BUD** column represents the current budget year and will need to be updated to reflect Form 8 revisions and reversions reappropriated made prior to preparation of the Budget Request. Modifications should be made in the **CY OPS Plan Change** column.

The data pre-populated in the **PY1 Actuals** should match the AFIN-BUD-004 (formerly P441) report at year end. The **CUR BUD** column should match AFIN-BUD-013 (formerly P421) at the Function (Activity) level.

New Item

Step 2. If a **Budget Object** is not displayed, click **New Item**. The newly inserted row will appear as the last entry. If there are multiple object lines, use the scroll bar in order to view the line added. There could also be multiple pages and the new item line will be the last item.

Summary										
<input type="checkbox"/>	Line	Budget Object	I	PY1 ACTUALS	CUR BUD	CY OPS PLAN CHANGE	BR CUR BUD UPDTD	REQUESTED AMOUNT	BR TOTAL REQUESTED	Justification Line Text
<input type="checkbox"/>	7	0125	E	800	0		0		0	
<input type="checkbox"/>	8	0129	E	0	0		0		13,600	
<input type="checkbox"/>	9	0201	E	126,199	1,200,027		1,200,027		95,035	
<input type="checkbox"/>	10	0202	E	202,063	0		0		173,552	
<input type="checkbox"/>	11	0203	E	461,940	0		0		336,600	
<input type="checkbox"/>	12	0500	E	0	2,253,916		2,253,916		0	
<input type="checkbox"/>	13	0800	E	0	455,000		455,000		0	
<input type="checkbox"/>	14	0900	E	147,884	2,687,900		2,687,900		0	
<input type="checkbox"/>	15	1100	E	40	1,000		1,000		0	
<input type="checkbox"/>	16	1400	E	92,022	100,000		100,000		0	
<input checked="" type="checkbox"/>	17									
Totals:				2,740,656	9,261,891	0	9,261,891	0	1,847,471	

Step 3. Include all **Budget Objects** essential for the agency's Budget Request. In the **CY OPS Plan Change** column insert any revised figures for each **Budget Object** and in the **Requested Amount** column enter the amounts being requested for the upcoming budget year.

Summary										
<input type="checkbox"/>	Line	Budget Object	I	PY1 ACTUALS	CUR BUD	CY OPS PLAN CHANGE	BR CUR BUD UPDTD	REQUESTED AMOUNT	BR TOTAL REQUESTED	
<input type="checkbox"/>	7	0125	E	800	0		0		0	
<input type="checkbox"/>	8	0129	E	0	0		0		13,600	
<input type="checkbox"/>	9	0201	E	126,199	1,200,027		1,200,027		95,035	
<input type="checkbox"/>	10	0202	E	202,063	0		0		173,552	
<input type="checkbox"/>	11	0203	E	461,940	0		0		336,600	
<input type="checkbox"/>	12	0500	E	0	2,253,916		2,253,916		0	
<input type="checkbox"/>	13	0800	E	0	455,000		455,000		0	
<input type="checkbox"/>	14	0900	E	147,884	2,687,900		2,687,900		0	
<input type="checkbox"/>	15	1100	E	40	1,000		1,000		0	
<input checked="" type="checkbox"/>	16	1400	E	92,022	100,000		100,000		0	
<input type="checkbox"/>	17	1600						100,000	100,000	
Totals:				2,740,656	9,261,891	0	9,261,891	0	1,847,471	

Step 4. Continue inserting **Budget Objects** used by the department.

Step 5. Once complete click [Save](#)  and Totals will calculate and appear at the bottom of each column allowing you to review for accuracy and rekey any **Budget Objects** omitted or keyed in error.

POSITION CHANGES TAB

The **Position Change Tab** is used along with the Salaries Benefits Forecasting System (SBFS) projections commonly referred to as the SBFS Data Dump Report. However, you must run the SBFS report through STAARS infoAdvantage. Please refer to the STAARS infoAdvantage Manual for state agencies instructions on how to run this report.

The projection provides information at the object level and projects the salaries and benefits two-years out. For example, if the current year is FY 15 (when the data is pulled from GHRIS), then the projection assumes every employee eligible for a two-step merit raise receives the raise for FY 16 and projects the new salaries and benefits for FY 17 (including a merit raise, if eligible, in FY 17).

The SBFS projection projects salaries (including longevity and merit raises, if eligible), Social Security (FICA) and Medicare (OASDI), Retirement and Insurance. The projection DOES NOT calculate overtime costs, subsistence pay or termination costs, so be sure to include these planned expenditures, if necessary, on the **Expenditures** tab in the Requested column.

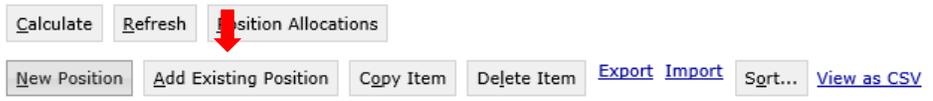
Make note that the **ONLY** way to change Object 0104 is through the Position Change tab. Just adding an amount on the Form 5 will cause the infoAdvantage generated Form 6 to not be in agreement with the Form 5 in total.

Step 1. Select the **Form 9 Position Changes** Tab.



A. REMOVE AN EMPLOYEE

1. If the revision is a decrease, removing an employee is required to reflect the correct totals in budget Object 0100. To remove an Employee, click on **Add Existing Position**.



The **Assigned or Vacant Position Search** screen displays.

Assigned or Vacant Position Search

Position Code: Employee Code: Employee Classification:

Employee First Name: Employee Last Name:

Display

Step 3. Enter any of the identifying information followed by a wildcard (*) for the specific employee you wish to remove from the particular chart of accounts using the following fields: Position Code, Employee Code, Employee Classification, Employee First Name, or Employee Last Name then click [Search](#).

Step 4. Click on the box next to the employee, then click the [Select](#)  button and the employee data will populate in the [Position Changes](#) tab. Note that the employee’s chart of account information populates in the form.

Step 5. Next, enter a negative 1 (-1) in the [Count](#) field to remove the employee.

Summary						
<input type="checkbox"/>	Pos No.	Emp No.	Classification	Grade	Step	Category
<input type="checkbox"/>						
<input type="checkbox"/>	0553273-005-1330	0000000173	10613	078	08	

Step 6. Enter the necessary information for the [Funding Start Date](#) and [Funding End Date](#) that corresponds to the employee’s last date of employment or the date for which you are moving an employee to another chart of account element.

Funding Start Date	Funding End Date
10/01/2016	12/31/2016

STAARS BUDGETING DEFAULT SETTING - Without designating the specific Funding Start Date and Funding End Date when working with Position Line Changes, STAARS Budgeting will default employee changes for the entire year. If the goal is to remove an employee for a partial year, specific dates must be entered.

Step 7. Once all of the required information has been entered click [Calculate](#). Note the calculated salary and total cost fields are updated to reflect the changes.



Salary Percentage	Benefit Percentage	Calculated Salary	Current Salary	Cost
100	100	-60,898.102008		-85,668.104918

B. ADDING AN EMPLOYEE OR NEW POSITION

Step 8. To ADD a new hire or add an existing employee to a new chart of account combination, click [New Position](#).  A new line will be added to the [Position Changes](#) tab.

[View as CSV](#)

Summary

<input type="checkbox"/>	Pos No.	Emp No.	Classification	Grade	Step	Category	Funding Start Date	Funding End Date	FTE	Count	Calculated Salary	Current Salary	Cost
<input checked="" type="checkbox"/>													

Step 9. In the **Classification** field, right click and then click **Search**.



Step 10. The **Classification Search** page will display. Click **Search** again.

Classification Search

Code: Name:

Display

Step 11. Using the wildcard (*), search for the classification by **Code** or **Name** of the new hire or employee you are adding. Example: 10613*

Classification Search

Code: Name:

Display

	Code	Name
<input type="button" value="Select"/>	10613	SENIOR ACCOUNTANT
<input type="button" value="Select"/>	10613T	SENIOR ACCOUNTANT
<input type="button" value="Select"/>	10613F02	ACCOUNTANT III - AOC
<input type="button" value="Select"/>	10613S	SR ACCT (AGENCY 099)

Step 12. Select the **Classification**, and the data will populate in the **Position Changes** tab.



Step 13. In the **Grade** field, right click and then click **Search**.

Step 14. The **Grade Search** screen will appear. Select the appropriate **Grade**, and the data will populate in the **Position Changes** tab.

Grade Search

Code: Name:

Display Items

Item Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#)

	Code	Name
Select	027	GRADE 27
Select	028	GRADE 28
Select	029	GRADE 29
Select	030	GRADE 30

Step 15. In the **Step** field, right click, then click **Search**.



Step 16. The **Step Search** screen will display, click **Search** again for the list to populate. Select the appropriate step.

Step Search

Code: Name:

Display Items

Item Page: [1](#) [2](#)

	Code	Name
Select	29	DIFF 29
Select	CV	CONVERSION
Select	30	STEP 30
Select	31	STEP 31
Select	32	STEP 32
Select	33	STEP 33
Select	34	DIFF 34
Select	35	DIFF 35

STAARS BUDGETING DEFAULT SETTING - For a new hire starting at a step greater than Step 1, you must identify the beginning step. If left blank, the system will default to the first step in which the salary range begins for this classification.

Step 17. Next, you will need to select the proper retirement category. In the **Category** field, right click



then click **Search**

Step 18. The **Category Search** screen will display. Click **Search** and the categories will display.

	Code	Name
Select	DEFAULT	Default Benefits
Select	NO BENEFITS	No Benefits
Select	TIER 1- TEACHERS	Tier 1- Teachers
Select	TIER 2- TEACHERS	Tier 2- Teachers
Select	TIER 1- ALL OTHER	Tier 1- All Other State Agencies
Select	TIER 2- ALL OTHER	Tier 2- All Other State Agencies
Select	TIER 1- LAW ENFORCE	Tier 1- Law Enforcement
Select	TIER 2- LAW ENFORCE	Tier 2- Law Enforcement
Select	TIER 1- JUDICIAL	Tier 1- Judicial
Select	TIER 2- JUDICIAL	Tier 2- Judicial

Step 19. Select the appropriate category to calculate the desired retirement and insurance benefits. Once selected the data will populate in the tab.

STAARS BUDGETING DEFAULT SETTING - Without designating the specific **Funding Start Date and Funding End Date** when working with Position Line Changes, STAARS Budgeting will default employee changes for the entire year. If the goal is to add an employee for a partial year, specific dates must be entered.

Funding Start Date	Funding End Date
10/01/2016	12/31/2016

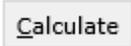
Step 20. In the **FTE** field, enter the desired FTE percentage:

FTE	Count	Salary Percentage
1	1	100

- 1 for a full-time employee
- .75 for a 75% part-time employee
- .50 for a 50% part-time employee
- .25 for a 25% part-time employee
- Or any other desired FTE percentage

Step 21. In the **Count** field, enter the number of employees that will be hired at this rate.

FTE	Count	Salary Percentage
1	1	100

Step 22. Once all fields have been added, click **Calculate**. 

Step 23. Click **Save**  and determine if the **Action was Successful**.

NOTE:

Because the old Operations Plan Application was used to enter your Operations Plan for FY2016, STAARS Budgeting does not have the data to produce a complete or revised Form 9 that you will use throughout fiscal year 2016. It is not a requirement to manually complete and provide a Form 9 with each revision. However, for record keeping purposes at the department, you may decide to keep documentation for all personnel changes made through revisions in STAARS Budgeting. STAARS Budgeting will reflect changes made, but a full report will be available.

The same process would need to be followed to add an employee that is being moved from another set of chart of accounts elements. Because the employee is actually assigned to certain chart of account elements, you may remove the specific employee. However a specific employee must be added back using the classification field. Therefore, when removing specific employees, be sure to make note of the classification, grade, step, and category when adding back the employee. This will ensure that amounts removed from one set of chart of accounts elements is the same amount added to a different set of chart of accounts elements.

To make adjustments for a promotion, REMOVE the specific employee for the dates desired, then create add a new line to ADD the employee back into the Budget Request using the new classification, step, category and appropriate dates, along with the chart of account element combination the employee needs to be budgeted in.

The SBFS projections does not project any type of raises for non-merit employees. Therefore, to adjust the salaries for non-merit employees and all corresponding benefits you will need to use the Form 9 Position Changes tab to remove the employee at the old rate and return them to the budget request at the new rate.

POSITION CHANGE RESULTS TAB

Use this tab to review the changes made on the Position Change tab.

Position Change Results

Step 1. Click on the [Position Change Results](#) tab.

Step 2. Notice the Chart of Account Elements affected in the [Budget Request Summary](#) section.

Budget Request Summary

Layout Code: <input type="text" value="BUD REQ BY FUNCTION"/>	Layout Type: <input type="text" value="Generic"/>	Request Code: <input type="text" value="BR 0100 942 0724"/>
Department: <input type="text" value="026"/>	Function: <input type="text" value="0724"/>	
Appropriation Unit: <input type="text" value="0"/>	Fund: <input type="text" value="0100"/>	
	Appropriation Class: <input type="text" value="942"/>	

Step 3. Check the employee information for accuracy.

Display Sub Total: Select Model:

[Export](#) [Import](#) [Audit Trail](#) [View Graph](#) [View as CSV](#)

Summary				
<input type="checkbox"/>	Line	Budget Object	IT	Position Tab Results
<input type="checkbox"/>	1	0104	E	37,808
<input type="checkbox"/>	2	0129	E	400
<input type="checkbox"/>	3	POS	S	1
<input type="checkbox"/>	4	0201	E	2,923
<input type="checkbox"/>	5	FTE	S	0.5

Step 4. Click [Save](#) and determine if the [Action was Successful](#).

NOTE: Changes **CANNOT** be made on the [Position Change Results](#) tab. You must return to the [Position Changes](#) tab for corrections.

SOURCE OF FUNDS TAB



Use this tab to identify the **Sources of Funds** expended for each Function (Activity) created on the Expenditures tab (Form 5).

Step 1. Select the **Sources of Funds** tab.

Step 2. Click **New Item**  to insert a line for each fund used for the department expenditures.

Step 3. In the **Fund** column right click to search for available funds. Click **Search**  the **Fund Search** screen will appear, click **Search** again for the list of funds to emerge. Select the fund code that corresponds with the source of fund(s) used on the Expenditures tab for the function represented. More than one source of funds may be necessary to outline the bases of the expenditures reported or appropriations.

NOTE: **ALL** General Fund or Education Trust Fund appropriations to a department should be reflected as one source of fund on any Form 5. Detailed information should be reflected on the Form 1 Receipts.

EXAMPLE:	0100-230	State General Fund
	0200-223	ETF

However, the agency should include details for earmarked funds.

EXAMPLE:	0352-201	Public Accountancy Fund
	0352-208	Public Accountancy Fund – Reversion Reappropriated

Step 4. Once all funds have been added, click **Save** and determine if the **Action was Successful**.

Advantage

Fund Search

Code: Name: Short Name: * Element Type:
Parent Fund:

Financial Rollups Information

Category:

Display:

Items 1-7 of 7

	Code	Name	Short Name	Element Type	Parent	Department
Select <input type="button" value="pencil"/>	0352-201	Public Accountancy Fund	Pub Accountancy	COA		
Select <input type="button" value="pencil"/>	0352-202	Administrative Fines and Late Renewal Penalties	Admin Fines&Lat	COA		
Select <input type="button" value="pencil"/>	0352-203	CPA, PA, NLO Registration Fees	CPA, PA, NLO Re	COA		
Select <input type="button" value="pencil"/>	0352-204	Examination Fees	Examination Fee	COA		
Select <input type="button" value="pencil"/>	0352-205	Firm Registration Fees	Firm Reg Fees	COA		
Select <input type="button" value="pencil"/>	0352-206	License Fees	Lic Fees	COA		
Select <input type="button" value="pencil"/>	0352-207	Salvage	Salvage	COA		

OTHER PERSONNEL INFO TAB



The data for this tab includes the Other Personnel Information found on the bottom of Form 6-Personnel Classification and includes items such as the Number of Special Merit Raises, New Positions and Actual Number of Employees on September 30th.

Note: Every Bud Req by Function (Form 5) will have the **Other Personnel Info** tab. Remember, to only enter this information on one Form 5 in the Bud Req by Function section.

Step 1. Select the **Other Personnel Info** reflected on the bottom of Form 6.

Step 4. Click **New Item** and right **Click** in the **Budget Object** field to Search. The **Budget Object** Search screen will appear.

	Code	Name	Short Name	Object Type	Element Type
Select	9990	# of Anniversary/Annual/Promotional Raises (OPI)	# of Raises	Statistic	COA
Select	9991	# of Special Merit Raises (OPI)	# Merit Raises	Statistic	COA
Select	9992	# of New Positions (OPI)	# New Pos	Statistic	COA
Select	9993	# of Vacant Positions Filled (OPI)	# Vac Pos Fill	Statistic	COA
Select	9994	# of Employees on September 30 (OPI)	# Emp on 9/30	Statistic	COA

Step 5. Select the code required to complete the Other Personnel Information for your department's anticipated **Anniversary/Annual/Promotional Raises, Special Merit Raises, New Positions, Vacant Positions Filled** and **Employees on September 30**. Provide the agency data for Actuals, Budgeted and Requested.

Step 6. Click **Save** and determine if the **Action was Successful**.

NOTE: You will complete this tab once using the Budget Request by Function tab reporting the information for the entire agency. If you complete this tab on more than one Budget Request By Function Form, it will sum all of the Budget Request By Function Forms together on your infoAdvantage generated Form 6.

FORMS 1 & 3 – BUD REQ BY DEPARTMENT LEVEL

BUD REQ BY DEPT

Budget Layout Selection

Code: Name:

Layout Type:

Display Items

Code	Name
BUD REQ BY FUNCTION	Budget Request- Forms 5 & 6
QPR TARGETS	Quarterly Performance Targets
PS OPS PLAN BUD EXP	PS Ops Plan-Expenditures & Transfer-Form 21
PS OPS PLAN	PS Operations Plan - Form 20
BUD REQ BY DEPT	Budget Request- Department level- Forms 1 & 3
MONTHLY REV ESTIMATE	Monthly Revenue Estimate
QPR Q1 ACTUALS	Quarter 1 Performance Actuals
QPR Q2 ACTUALS	Quarter 2 Performance Actuals
QPR Q3 ACTUALS	Quarter 3 Performance Actuals
QPR Q4 ACTUALS	Quarter 4 Performance Actuals
ANNUAL REV ESTIMATE	Annual Revenue Estimate
PS BUD REQ E&G	PS Restricted & Unrestricted & E & G Budget Request-Form 14
PS BUD REQ AUXILIARY	PS Unrestricted Auxiliary Enterprises Bud Req - Form 14
PS BUD REQ PERSONNEL	PS Restricted & Unrestricted Personnel Bud Req-Form 17
PS BUD REQ HOSPITAL	Post Secondary Hospital Financial Summary Bud Req - Form 14A
BUDGET REVISION	Budget Revision - Forms 8 and 9
OPERATIONS PLAN	Operations Plan Forms 8

Step 2. On the **Select Budget Request** screen click **Search**. Select the agency form that is populated.

Supplementary tabs will emerge that will allow you to enter the department data for Forms 1 and 3. The tabs are: **COF Balances Brought Forward**, **COF Receipts**, **COF Adjustments and End Bal**, **Capital Expenditures**, **Department Description**, and **Document Management**.

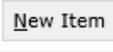
CGI Advantage

Edit Budget Request | COF Balances Brought Forward | COF Receipts | COF Adjustments and End Bal | Capital Expenditures | Department Description | Document Management

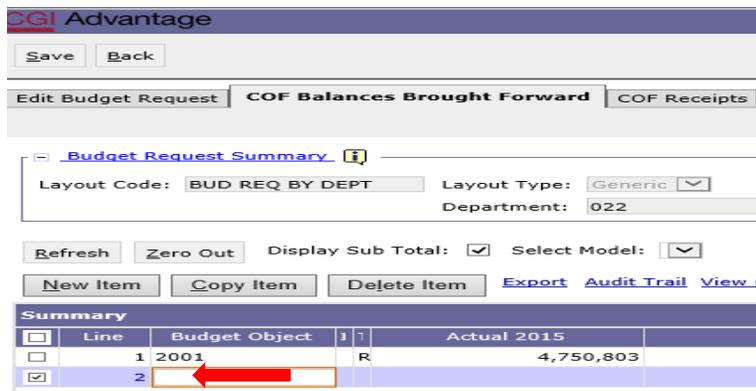
COF BALANCES BROUGHT FORWARD TAB



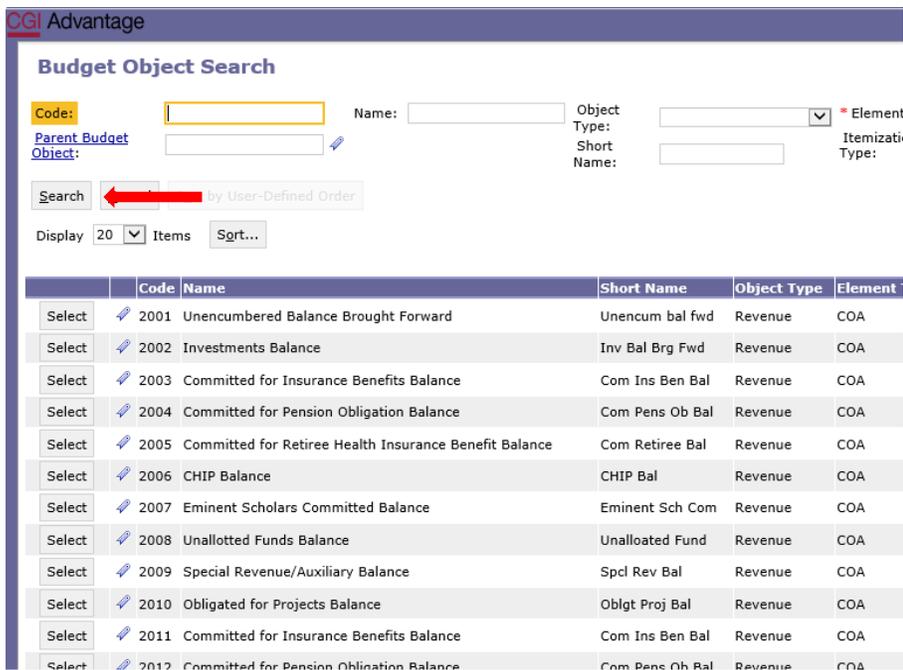
Step 1. Select the **COF Balances Brought Forward** Tab.

Step 2. Select **New Item**  to insert a new line that will allow you to add the Department's data in the Actual Year column.

Step 3. In the **Budget Object** field right click and then select **Search**. 



The **Budget Object Search** screen will appear. Click **Search** again in order for the codes to populate.



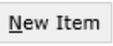
Step 4. Select the code(s) necessary to complete the department's Condition of Funds for Form 1 that reflects Unencumbered Balance(s) Brought Forward. Below is a snapshot of the section from Form 1 that you will be preparing on the COF Balance Brought Forward tab.

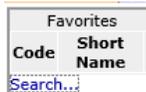
Step 5. Once complete click [Save](#)  at the top of the page. **Action was Successful** message will appear.

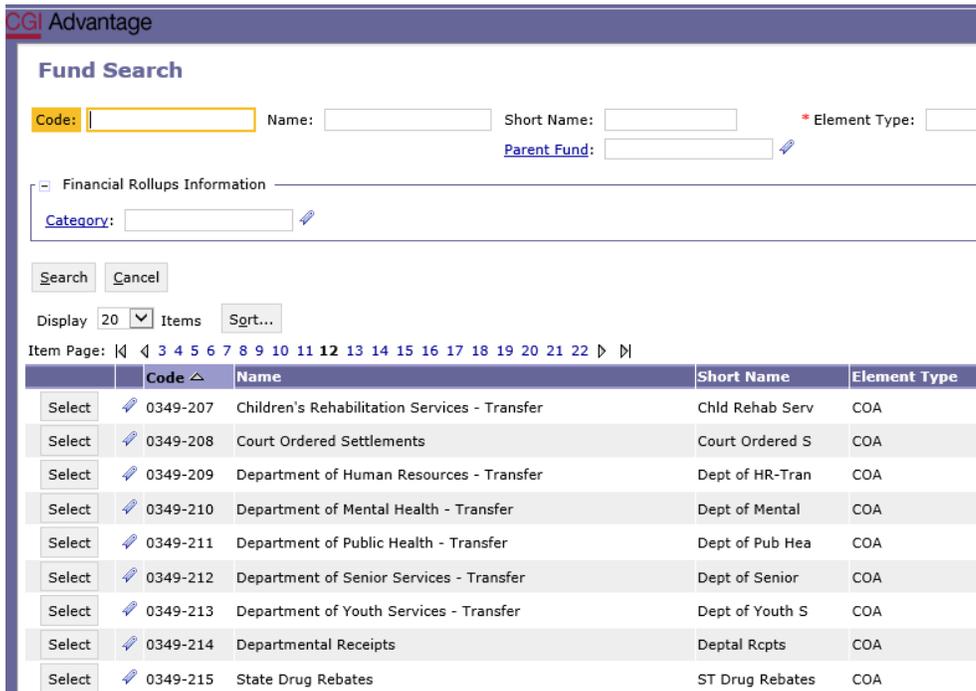
COF RECEIPTS TAB



Step 1. Select the **COF Receipts** Tab.

Step 2. Select **New Item**  to insert a new line that will allow you to add the Department's current data for Actual, Budgeted and Requested Receipts related to the fiscal years at the time of Budget Request preparation.

Step 3. In the **Budget Object** field right click and then select **Search**.  The **Fund Search** screen will appear, click **Search** again for the fund to populate. Select only the funds received or intended to be used for the fiscal years reporting.



Step 4. Select the fund code that corresponds with the receipts used by the department. More than one fund may be necessary to outline the bases of the receipts.

[New Item](#) [Copy Item](#) [Delete Item](#) [Itemize](#) [Export](#) [Audit Trail](#) [View Graph](#) [Sgtr...](#) [View as CSV](#)

Summary						
<input type="checkbox"/>	Line	Fund	Actual	Budgeted	Requested	
<input type="checkbox"/>		0405-208	2,000,000	1,000,000	1,000,000	
<input checked="" type="checkbox"/>		0400-101	156,984	265,984	325,462	

Step 5. Once complete click [Save](#)  at the top of the page. **Action was Successful** message will appear.

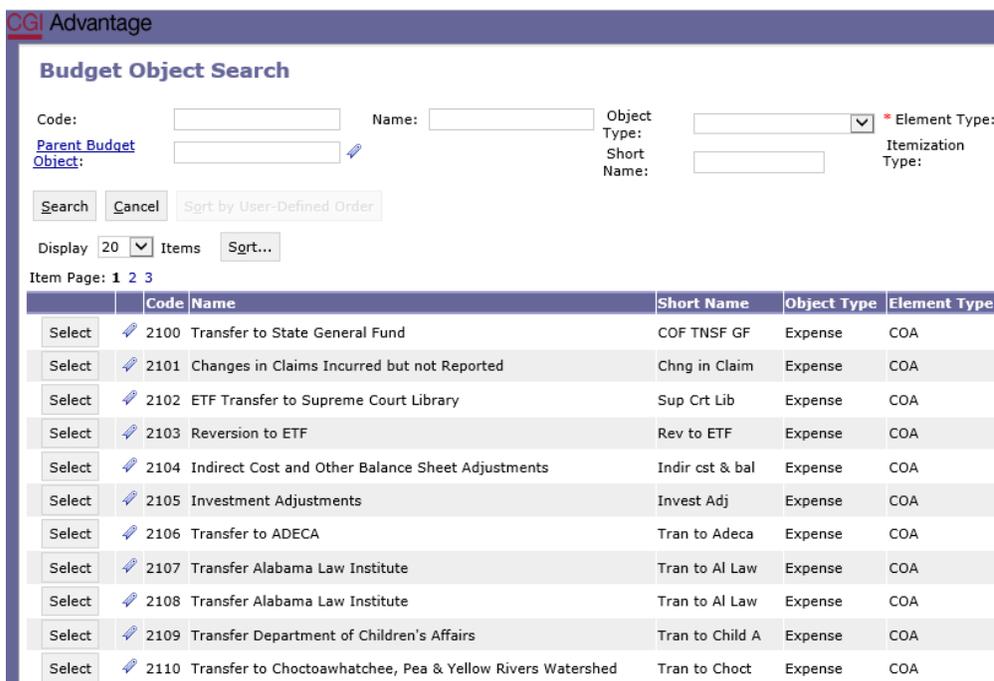
COF ADJUSTMENTS AND ENDING BALANCE



Step 1. Select the **COF Adjustments and End Bal** Tab.

Step 2. Select **New Item**  to insert a new line that will allow you to add the Department's current data for Actual, Budgeted and Requested Receipts related the fiscal years at the time of Budget Request preparation.

Step 3. In the **Budget Object** field right click and then select **Search**.  The **Budget Object Search** screen will appear. Select only objects that need to be listed for adjustments made such as transfers or reversions.



Step 4. Once complete click **Save**  at the top of the page. **Action was Successful** message will appear.

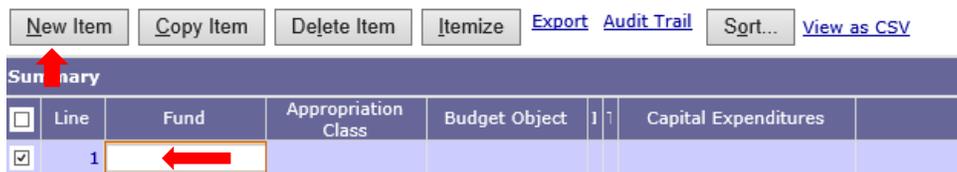
CAPITAL EXPENDITURES TAB - (FORM 3)



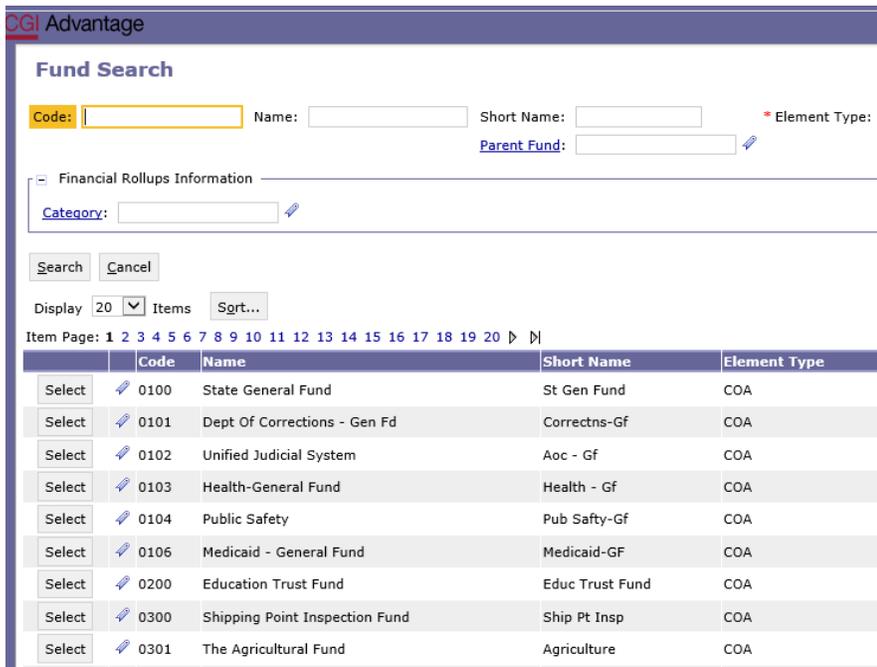
The following steps will need to be followed for each capital expenditure line requested in the Budget Request.

Step 1. Select the **Capital Expenditures** Tab.

Step 2. Select **New Item**  to insert a new line for each Capital Expenditure being requested by the Department on Form 3.



Step 3. In the **Fund** field right click and then select **Search** . The **Fund Search** screen will appear, click **Search** again for the department funds to populate. Select only the funds appropriate for your Department's Capital Expenditure request.



Step 4. In the **Appropriation Class** field right click and then select **Search** . The **Appropriation Class Search** screen will appear, click **Search** again for the department's appropriation classes to populate.

CGI Advantage

Appropriation Class Search

Code: Name: Short Name: * Element Type:

[Parent Appropriation Class:](#)

Display Items

Item Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#)

	Code	Name	Short Name	Element Type
Select	000	Appropriation Transfers	Appropriation T	COA
Select	010	Agricultural Promotional Prog	Agricultural Pr	COA
Select	011	Agricultural Development Servi	Agricultural De	COA
Select	021	Regulatory Services	Regulatory Serv	COA
Select	031	Forest Resources Prot & Develop	Forest Resource	COA
Select	033	Mgt/Reg Of Oil/Gas Explor/Dev	Mgt/Reg Of Oil/	COA
Select	041	Regulatory Services	Regulatory Serv	COA
Select	050	Capital Outlay	Capital Outlay	COA



Step 5. In the **Budget Object** field right click and then select **Search**. The **Budget Object Search** screen will appear, click **Search** again for the Capital Expenditure codes to populate. Select the appropriate code for each capital expenditure line reported on Form 3.

CGI Advantage

Budget Object Search

Code: Name: Object Type: * Element Type:

[Parent Budget Object:](#)

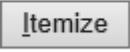
Display Items

	Code	Name	Short Name	Object Type	Element Type
Select	1200	Capital: Capital Outlay	Capital Cap Out	Expense	GRP
Select	1300	Capital: Transportation Equipment Purchases	Cap Tran Equip	Expense	GRP
Select	1400	Capital: Other Equipment Purchases	Cap O Equip Pur	Expense	GRP

Common **ERROR MESSAGE**: - "Multiple dimensions exist" indicates that the budget object should be searched and selected rather than keyed directly as 1200, 1300, or 1400.

Budget Request >> Budget Line 4 >> Code BF4046 Unable to Save. Multiple Dimension dimensions exist with the code '1400'. Please use the search link to select the desired dimension.

BF3022 Unable to Itemize. Selected Budget Line does not have a Budget Object specified

Step 6. In the **Capital Expenditures** field Click **Itemize** .

[Export](#)
[Audit Trail](#)
[View Graph](#)

[View as CSV](#)

Summary						
<input type="checkbox"/>	Line	Fund	Appropriation Class	Budget Object		Capital Expenditures
<input checked="" type="checkbox"/>		0100	115	1400		<input type="text"/>

Step 7. The Capital Expenditure screen will change to the **Fixed Assets Information** screen and allow you to select the Commodity Item similar to the capital expenditure being requested. Once the screen changes,

you MUST click **New Item**  to itemize the department's capital expenditures.

Step 8. Click on [Commodity Item](#) *** Commodity Item:** 

CGI Advantage

Line#: Object Code: 1400 Object Name: Capital: Other Equipme

Display 20 Items

<input checked="" type="checkbox"/>	Name	Item	Total	Posting Tim
<input type="checkbox"/>	-	-	0-	

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

Fixed Assets Information 

* **Commodity Item:** 

Commodity Code:

Commodity Item Code:

Name:

* Quantity:

* Price:

Total:

* Posting Time Period:

Comment:



Step 9. The search box for **Commodity Item Code** will appear. Click **Search** and the screen changes to the **Search Commodity Items**. Click **Search** again for the list to populate. Select the code appropriate for your capital expenditure being reported.

CGI Advantage

Search Commodity Items

Code: Commodity Code: Name:

Display Items

	Code	Commodity Code	Name
Select	ACADEMIC EQUIP FURN	OTHER EQUIP PURCHASE	Academic Equipment, Furnishings and Accessories
Select	RESIDENTIAL FURN EQ	OTHER EQUIP PURCHASE	Residential Furnishing and Equipment
Select	CLEANING EQUIP & ACC	OTHER EQUIP PURCHASE	Cleaning Equipment and Accessories
Select	COMM EQUIP & ACC	OTHER EQUIP PURCHASE	Communications Equipment and Accessories
Select	COMPUTER EQUIP & ACC	OTHER EQUIP PURCHASE	Computer Equipment and Accessories
Select	COOKING EQUIP & ACC	OTHER EQUIP PURCHASE	Cooking Equipment and Accessories
Select	LAW ENF & SEC EQUIP	OTHER EQUIP PURCHASE	Law Enforcement/Security Equipment
Select	LAWN & GARDEN EQUIP	OTHER EQUIP PURCHASE	Lawn and Garden Equipment
Select	LEGAL	OTHER EQUIP PURCHASE	Legal
Select	MED LAB EQUIP & ACC	OTHER EQUIP PURCHASE	Medical/Laboratory Equipment and Accessories

Name Item

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

Fixed Assets Information

* **Commodity Item:**

Commodity Code: * Quantity:

Commodity Item Code: Price:

Name: Label:

* Posting Time Period:

Comment:

The **Commodity Code**, **Commodity Item Code** and **Name** fields will auto fill after your selection.

* **Commodity Item:**

Commodity Code:

Commodity Item Code:

Name:

Step 10. Key the **Quantity** for the capital expenditure indicating how many items will be purchased. Example: 10 laptops.

Step 11. Key the **Price** for one item being purchased. The system will calculate the **Total** based on the quantity and price stated.

Step 12. Click **REFRESH** to view the calculations.

The screenshot shows the CGI Advantage interface. At the top, there are fields for Line#, Object Code (1400), Object Name (Capital: Other Equipme), and Stage (1). Below these are buttons for New Item, Copy Item, Delete Item, Update, Refresh, Display 20 Items, and Sort... A red arrow points to the Refresh button. Below the buttons is a table with the following data:

Name	Item	Total
Computer Equipment and Accessories	COMPUTER EQUIP & ACC	600

Below the table are links for Expand All and Collapse All. A detailed view of the Fixed Assets Information is shown below, with a red arrow pointing to the Total field. The details include:

- * Commodity Item: OTHER EQUIP PURCHASES
- * Quantity: 10
- * Price: 60
- * Total: 600
- Commodity Code: OTHER EQUIP PURCHASES
- Commodity Item Code: COMPUTER EQUIP & ACC
- Name: Computer Equipment and Accessories
- * Posting Time Period: (dropdown menu)
- Comment: (text area)

Step 13. You must also change the Posting Time Period. Use the dropdown arrow next to **Posting Time Period** to **Select Capital Expenditures**.

This screenshot shows the Fixed Assets Information panel from the previous screenshot. The * Posting Time Period dropdown menu is now open, and 'Capital Expenditures' is selected. A red arrow points to the dropdown arrow. The other fields remain the same:

- * Commodity Item: OTHER EQUIP PURCHASES
- * Quantity: 10
- * Price: 60
- * Total: 600
- Commodity Code: OTHER EQUIP PURCHASES
- Commodity Item Code: COMPUTER EQUIP & ACC
- Name: Computer Equipment and Accessories
- * Posting Time Period: Capital Expenditures
- Comment: (text area)

Step 14. Click **Update**.

This screenshot shows the main menu of the CGI Advantage interface. The Update button is highlighted with a red arrow. The other fields and buttons are the same as in the previous screenshots:

Line#: Object Code: 1400 Object Name: Capital: Other Equipme

New Item Copy Item Delete Item Update Refresh Display 20 Items Sort...

Once you have selected **Update** the screen will return to the **Capital Expenditures** page below.

CGI Advantage

Save Back

Edit Budget Request | COF Balances Brought Forward | COF Receipts | COF Adjustments and End Bal | **Capital Expenditures**

Budget Request Summary ⓘ

Layout Code: BUD REQ BY DEPT Layout Type: Generic ▾ Request Code: 002 Rec
Department: 002

Refresh Zero Out Display Sub Total: Select Model: ▾

New Item Copy Item Delete Item Itemize Export Audit Trail View Graph Sort... View as CSV

Summary						
<input type="checkbox"/>	Line	Fund	Appropriation Class	Budget Object		Capital Expenditures
<input type="checkbox"/>	1	0100	115	1400	FE	600

Step 15. Once complete click **Save**  at the top of the page. **Action was Successful** message will appear.

EDITING CAPITAL EXPENDITURES

Step 1. On the **Capital Expenditures** screen return to the expenditure line that you need to update. Notice the check marks.

<input type="button" value="New Item"/>	<input type="button" value="Copy Item"/>	<input type="button" value="Delete Item"/>	<input type="button" value="Itemize"/>	Export	Audit Trail	View Graph	<input type="button" value="Sort..."/>	View as CSV
Summary								
<input type="checkbox"/>	Line	Fund	Appropriation Class	Budget Object	I	T	Capital Expenditures	
<input type="checkbox"/>	1	0100	115	1400	F	E	35,000	
<input checked="" type="checkbox"/>	2	0100	115	1400	F	E	0	

Step 2. Click **Itemize**. The screen changes to the **Fixed Assets Information** screen. A listing of capital expenditures added to this point will appear.

CGI Advantage Help

Line#: Object Code: Object Name: Stage:

Display Items

Items 1-2 of 2

<input type="checkbox"/>	Name	Item	Total	Posting Time Period
<input type="checkbox"/>	Computer Equipment and Accessories	COMPUTER EQUIP & ACC	10,000	Capital Expenditures
<input checked="" type="checkbox"/>	Automobiles	AUTOMOBILES	25,000	Capital Expenditures

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

Fixed Assets Information

* Commodity Item:

Commodity Code: * Quantity:

Commodity Item Code: * Price:

Name: Total:

* Posting Time Period:

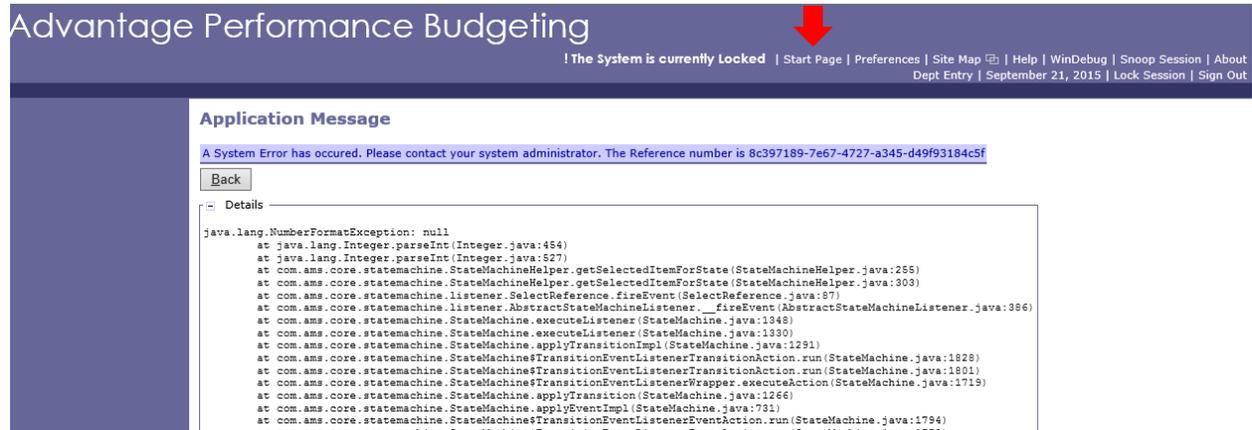
Comment:

Step 3. Select the expenditure line that requires updating and that line of information will appear in the **Fixed Assets Information** screen.

Step 4. Update the Commodity as desired.

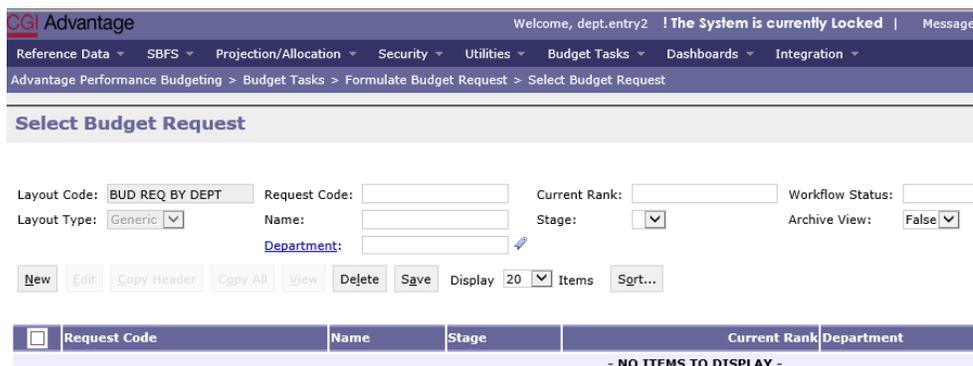
Step 5. Remember to **Refresh** and **Update** once complete.

ERROR MESSAGE EXAMPLE



The screenshot shows the Advantage Performance Budgeting application interface. At the top, a blue navigation bar contains the text "The System is currently Locked" and several links: Start Page, Preferences, Site Map, Help, WinDebug, Snoop Session, About, Dept Entry, September 23, 2015, Lock Session, and Sign Out. A red arrow points to the "The System is currently Locked" text. Below the navigation bar, the "Application Message" section displays the following text: "A System Error has occurred. Please contact your system administrator. The Reference number is 8c397189-7e67-4727-a345-d49f93184c5f". A "Back" button is visible below the message. The "Details" section shows a stack trace starting with "java.lang.NumberFormatException: null" and listing several lines of code from the application's core classes.

The **Application Message** above, indicates that a New Line (Step 7) was not inserted. To clear the message click on **Start Page** across the blue tool bar. You will then be re-directed to **the Select Budget Request**



The screenshot shows the "Select Budget Request" screen. The top navigation bar includes "CGI Advantage" and "Welcome, dept.entry2". Below the navigation bar, the breadcrumb trail reads "Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request". The main content area features a form with the following fields: "Layout Code" (BUD REQ BY DEPT), "Request Code" (empty), "Current Rank" (empty), "Workflow Status" (empty), "Layout Type" (Generic), "Name" (empty), "Stage" (dropdown), "Archive View" (False), and "Department" (empty). Below the form are buttons for "New", "Edit", "Copy Header", "Copy All", "View", "Delete", "Save", "Display 20", "Items", and "Srt...". At the bottom, a table header is visible with columns for "Request Code", "Name", "Stage", "Current Rank", and "Department". The table content is empty, displaying "- NO ITEMS TO DISPLAY -".

[Go to top of page](#)

screen.

Return to complete the Capital Expenditures on Form 3 as follows:

1. Click Budget Task
2. Formulate Budget Request
3. BUD EQ BY DEPT (Budget Request – Department level – Forms 1 & 3)
4. Select the form and return through the process of entering Capital Expenditures.

ERROR MESSAGE – EXAMPLE



BF3032 Unable to Save. Posting column cannot be unfilled on a Budget Line Detail.

This message indicates the Posting Time Period was not updated. Review Step 13.

ERROR MESSAGE – EXAMPLE

 BF3035 Values were modified by a System Refresh of one or more Budget Line Details. Please return to the Budget Line Detail Page and check your data. Always refresh the Budget Line Detail Page after modifying an Budget Line Detail.

This message indicates the **Refresh** and **Update** buttons were not selected during the edit.

DEPARTMENT DESCRIPTION TAB

Advantage

Save Back

Edit Budget Request COF Balances Brought Forward COF Receipts COF Adjustments and End Bal Capital Expenditures **Department Description** Document Management

Display 20 Items Sort...

Step 1. Select the [Department Description](#) Tab.

Section Title	Section Content
Department Description	Outdoor Recreation Sites And Services: Acquires and preserves natural areas; develops, furnishes, and maintains recreational facilities; and expands the knowledge of the natural environment of the state for the benefit of the public and tourism. Wildlife and Freshwater Fisheries: Manages the fish and wildlife resources of the state through freshwater fisheries, wildlife management, enforcement, administration, and fishing and hunting opportunities. Marine Police: Enforces the state's boating laws and regulations; investigates boating accidents; maintains aid to navigation on over 1,000,000 waterway acres of recreational and commercial waterways in the state; and registers and maintains records for approximately 300,000 boats. Marine Resources: Conserves the marine fisheries resources of the state through research, management, and enforcement. State Lands Management: Manages 30,000 acres of school lands, 7,000

Step 2. Read through the description provided for your department and revise if desired. If there is no description, feel free to add. However, if no changes need to be made, click [Save](#)  to exit. [Action was Successful](#) will appear.

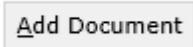
DOCUMENT MANAGEMENT TAB

All reports created in infoAdvantage will need to be attached in the appropriate form using the following steps.

Step 1. Select the **Document Management** tab.

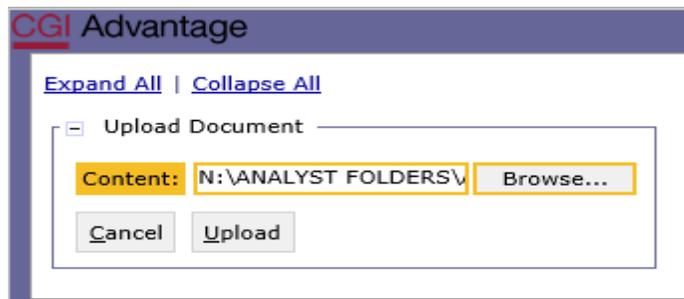


Step 2. Click **Add Document**.

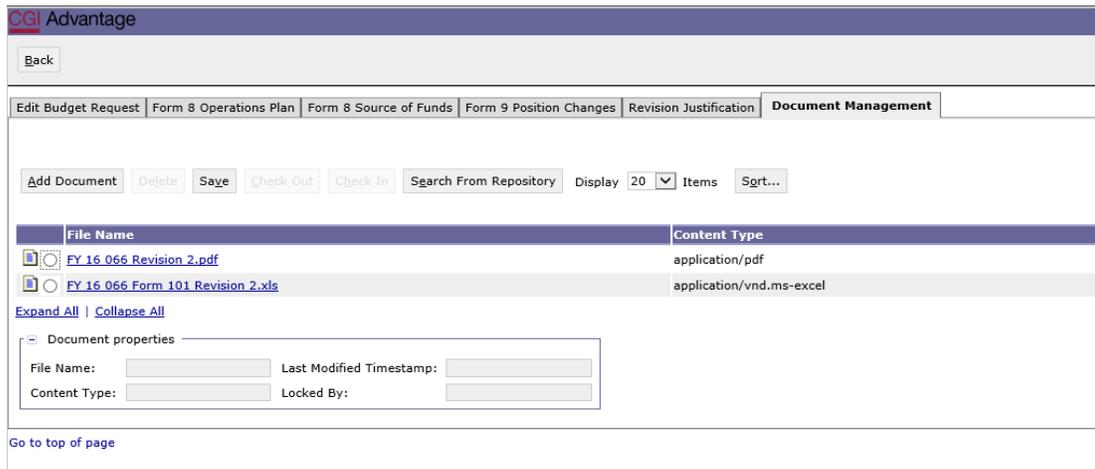


The following screen will display.

Step 3. Click **Browse** to locate your saved files. Select your file which will populate in the Content: box.



Step 4. Click **Upload**. As your documents are attached to the form, they will display below.



NOTE: Please be sure to attach ALL required documentation for a Budget Request Packet in the Document Management tab using a PDF format. Other documentation could be grant awards letters, program change letters, etc.

Please use a similar format for naming these additional documents, examples:

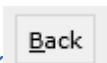
FY 16 066 Revision 2 Program Change Letter

FY 16 066 Revision 2 Grant Awards

FY 16 066 Revision 2 Other Support

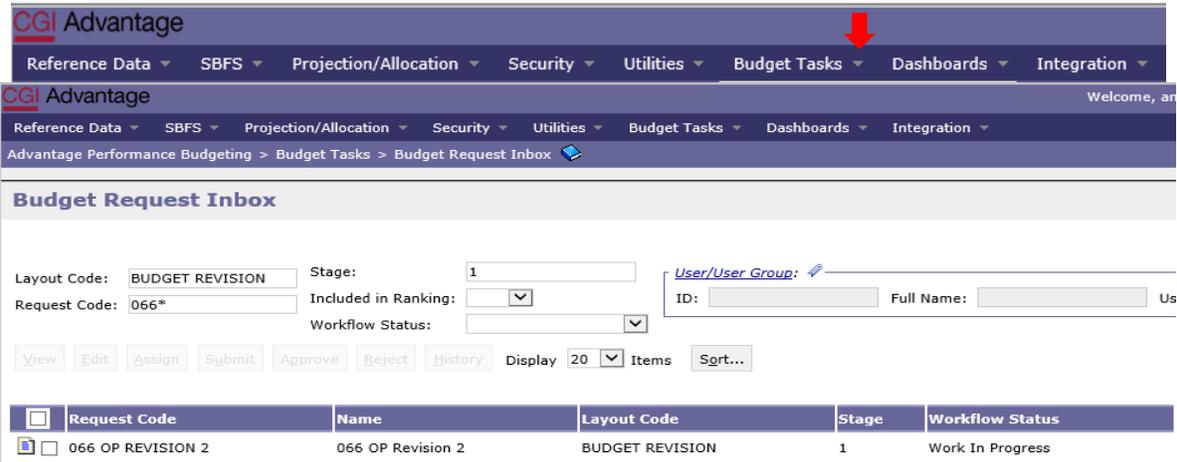
Step 5. When all required forms have been attached in the **Document Management** tab, click on the **Edit Budget Request** tab.

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

Step 7. Click **Back**  to exit out of the form.

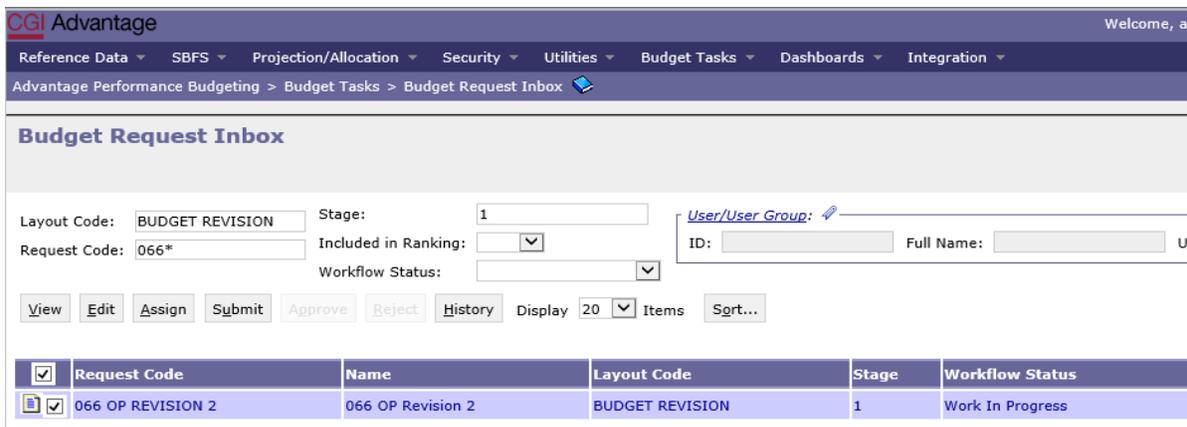
SUBMISSION

To submit the final Budget Request Packet return to the Budget **Tasks** drop down menu.



Step 1. Select **Budget Request Inbox**. The **Budget Request Inbox** will display.

Step 2. Select the Budget Request that is ready to be submitted. Note the action buttons light up: View, Edit, Assign, and Submit.



Step 3. Click **Submit**. The following screen displays, allowing you to add comments for the Executive Budget Office.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox > Submit Budget Request

Submit Budget Request

Please approve this revision.

Comments:

Summary

Step 4. Click **Confirm**. You will be taken back to the **Budget Request Inbox** and receive a message that the Budget Request was **Successfully Submitted**. Each document submitted will be identified by the name given during preparation.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Inte

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox 

 BF3143 The Budget Request '066 OP REVISION 2' successfully submitted 

Budget Request Inbox

WORKFLOW

The 1st approver will receive an email. The email will include the comment along with a link to STAARS Budgeting.

Please approve this revision. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

Step 1. Clicking the link will bring up the sign in page for STAARS Budgeting. The 1st approver will need to open their **Budget Request Inbox** under **Budget Tasks**.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > S

Select Budget Request

Layout Code: Request Code:

Layout Type: Name:

Department:

Stage: Workflow Status:

Archive View:

Display Items

Step 2. The 1st approver will need to **select the form(s)**.

CGI Advantage

Welcome, ann.franklin ! The System is currently Locked | Messages(0) [Home]

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox

Budget Request Inbox

Layout Code: Stage:

Request Code: Included in Ranking: ID: Full Name: User Type:

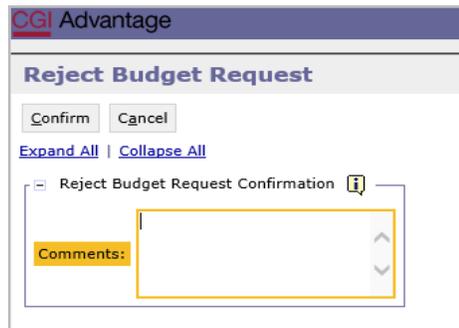
Workflow Status:

Display Items

<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status	Included in Ranking	Comments
<input type="checkbox"/>	066 OP REVISION 2	066 OP REVISION 2	BUDGET REVISION	1	Submitted	False	Please approve this revision.
<input type="checkbox"/>	066 BR 0940 631 0632	066	BUD REQ BY FUNCTION	1	Work In Progress	False	

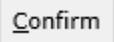
Step 3. To review the revision, click **View**.

Step 4. After review, if the documents need editing, the 1st approver will need to click **Reject**.  The following screen will appear.



Step 5. Use the **Comments** section to describe why the documents were rejected.

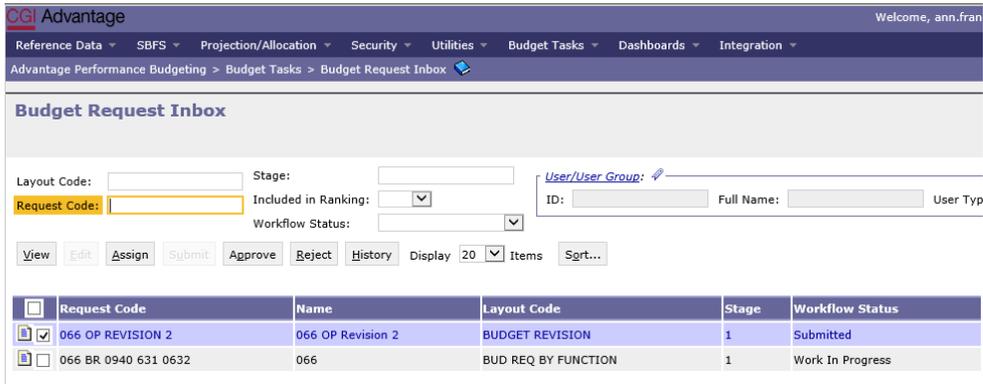


Step 6. Click **Confirm**.  This will send the Budget Request back to the person that submitted it to the 1st approver. The submitter will receive an email that includes the comment and a link to STAARS Budgeting to open the document and make the necessary corrections.

We also need to move funds from object 0800 to object 0900 in Fund 0399 for Fund 0275. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

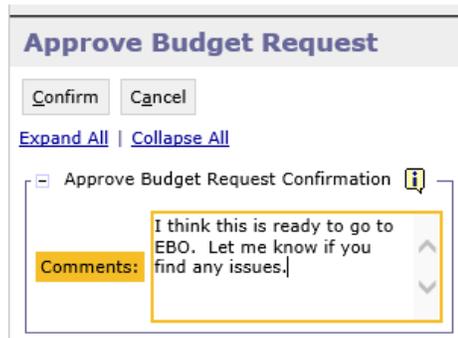
NOTE: The submitter should make the required changes in STAARS Budgeting, rerun the reports in infoAdvantage and attach updated error reports (with no mismatch message) using the **Document Management** tab. The process should take place anytime corrections are to be made for a Budget Request, Operation Plans or Budget Revision. Then, the submitter can resubmit the Packet(s) to the 1st approver.

Step 7. Once the 1st approver receives the corrected Budget Request Packet, reviews and determines that is satisfactory the 1st approver can use the email received in Outlook to follow the link and now approve the form(s) by clicking **Approve**. 



Step 8. The **Approve Budget Request** screen displays allowing for **Comments** to added and sent to the 2nd approver.

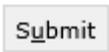
Step 9. Click **Confirm**  to approve the Budget Request.



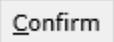
Step 10. The 2nd approver will receive an email in Outlook with a link to STAAR Budgeting to login and approve.

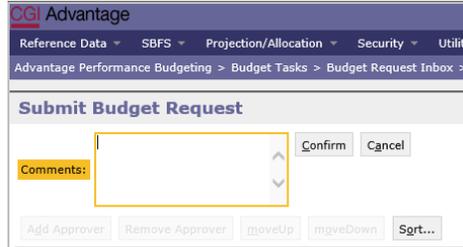
I think this is ready to go to EBO. Let me know if you find any issues. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

NOTE: The form(s) will stay in 1st approver’s inbox until they **submit** the form(s) to the 2nd approver. **Step**

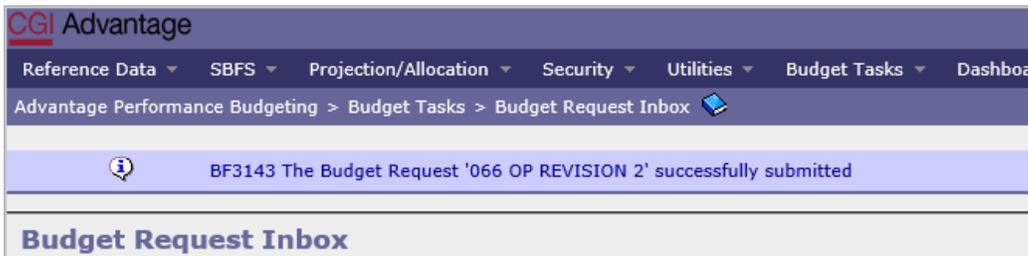
11. To submit the form(s) to the 2nd approver, select the form(s) again, then click **Submit**. 

The **Submit Budget Request** screen displays.

Step 12. Click **Confirm**  to submit the Budget Request Packet.



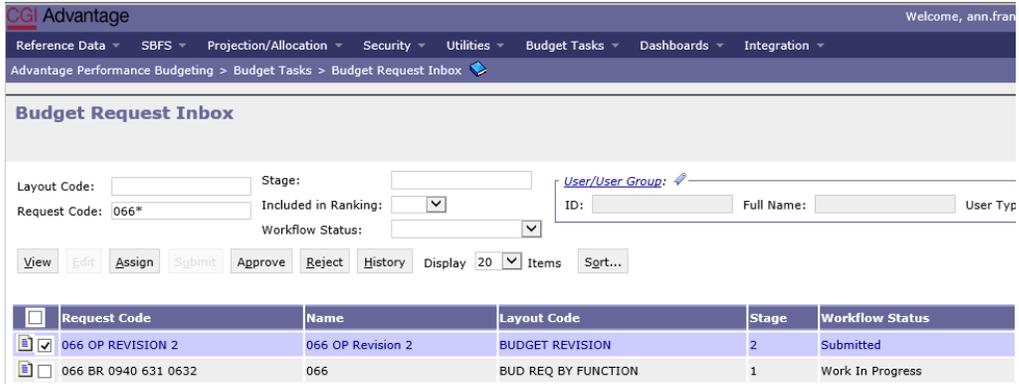
Step 13. You will return to the **Budget Request Inbox** and a message displays that the Budget Request was **Successfully Submitted**. The 2nd approver receives an email in Outlook indicating that the Budget Request has been submitted.



ADDITIONAL OPTION - REJECTED

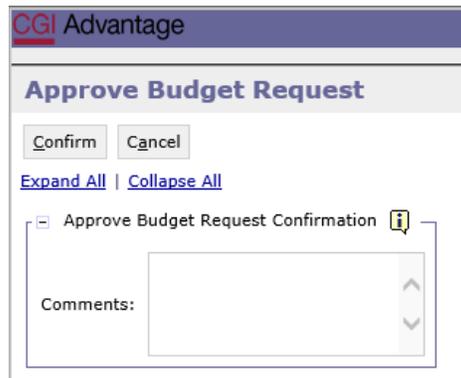
The 2nd approver also has the options, to View, Approve, or Reject a form. If rejected, the form(s) is returned to the 1st approver. After the 2nd approver has reviewed the form, the form(s) is ready to approve and submit to the Executive Budget Office.

Step 14. Select the form(s), then click **Approve**. 



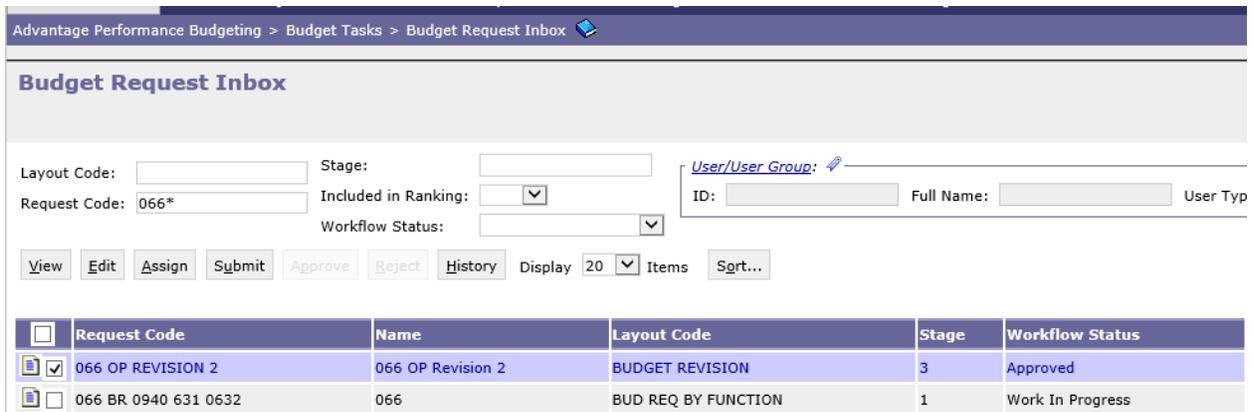
The **Approve Budget Request** screen displays, allowing for **Comments**.

Step 15. Click **Confirm**  to approve the form(s).



NOTE: The form(s) remains in the 2nd approver's STAARS Inbox until it is submitted to the Executive Budget Office.

Step 16. Select the form(s), then click **Submit** .



The **Submit Budget Request** screen displays.

Step 17. Enter any desired **Comments** for the Executive Budget Office, then click **Confirm**.

Confirm

Step 18. You will return to the **Budget Request Inbox** and should have a message that the form(s) was **Successfully Submitted**.



The process to submit to the Executive Budget Office has been completed!

NOTE: If rejected by the Executive Budget Office, the forms(s) will be returned to the 2nd approver for corrections. The 2nd approver will need to make the required changes, regenerate the reports in infoAdvantage and re-submit the form(s).