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

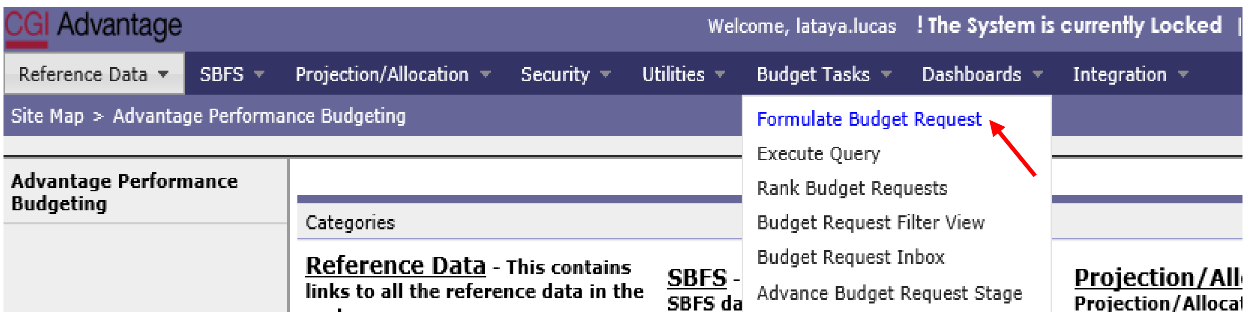
This link will provide step-by-step instructions to assist you with navigating the STAARS Budgeting Interface, browser preferences such as turning off pop-up blockers and allowing downloadable files. The link will also help users add the STAARS Budgeting to My Favorites for easier access.

STAARS STATEWIDE BUDGET REPORTS

STAARS Report ID	FUNCTIONAL AREA
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, Appropr 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

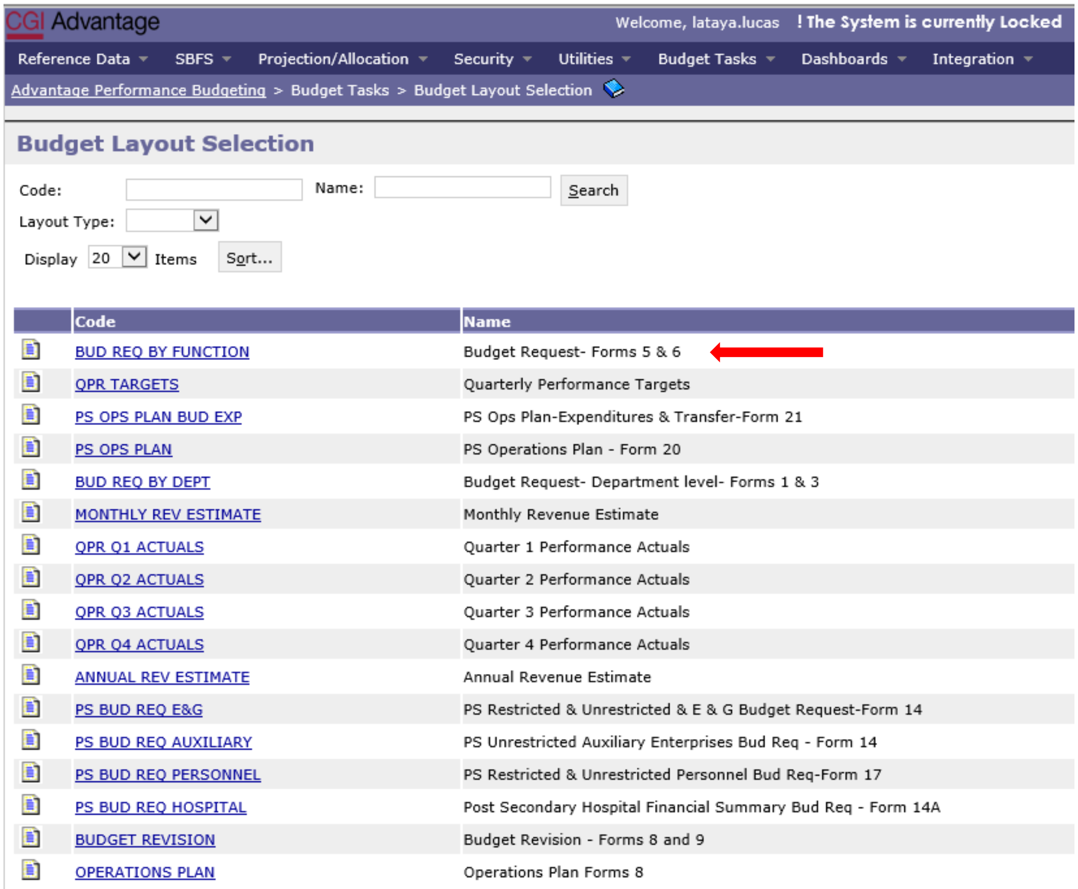
Note: Form 2-Summary Budget Request will be generated by STAARS Budgeting after all other forms have been completed.

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.

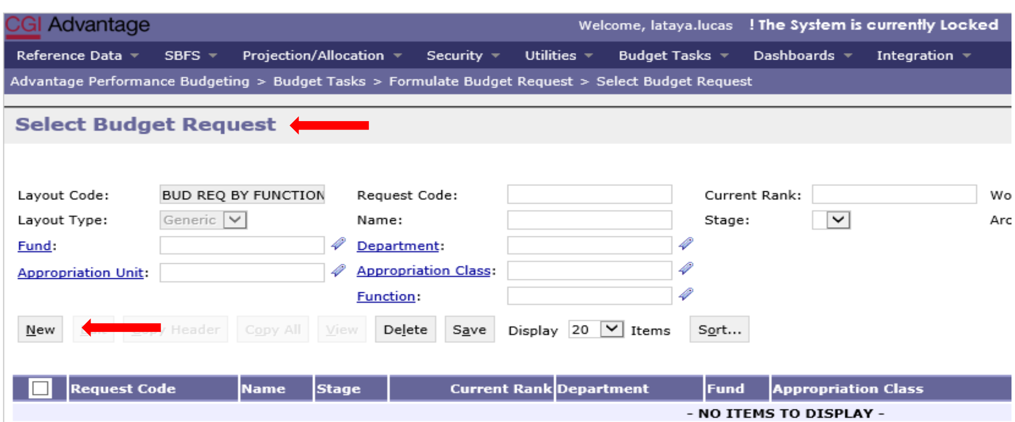
<u>FORMS 5 & 6 – BUD REQ BY FUNCTION</u>

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).



Step 2. On the Select Budget Request screen click New.



The Create Budget Request screen will appear.

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

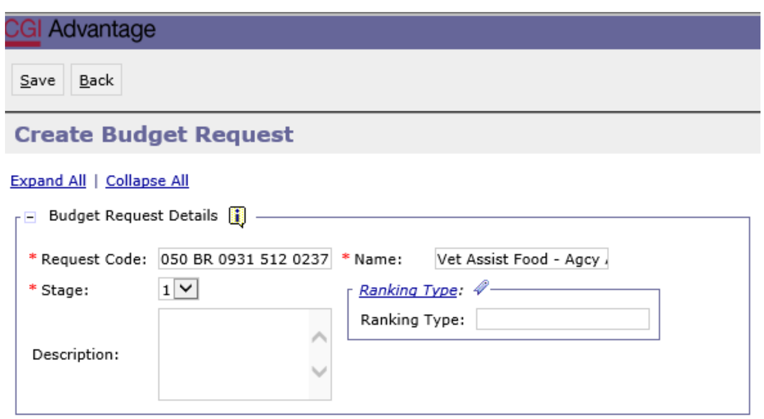
Appropriation Class: 3 digits (formerly Appropriation Unit)

Function: 4 digits (formerly Activity code)

Name: **(Example)** Vet Assist Food – Agcy Admin

Enter the Fund Name & Function Name

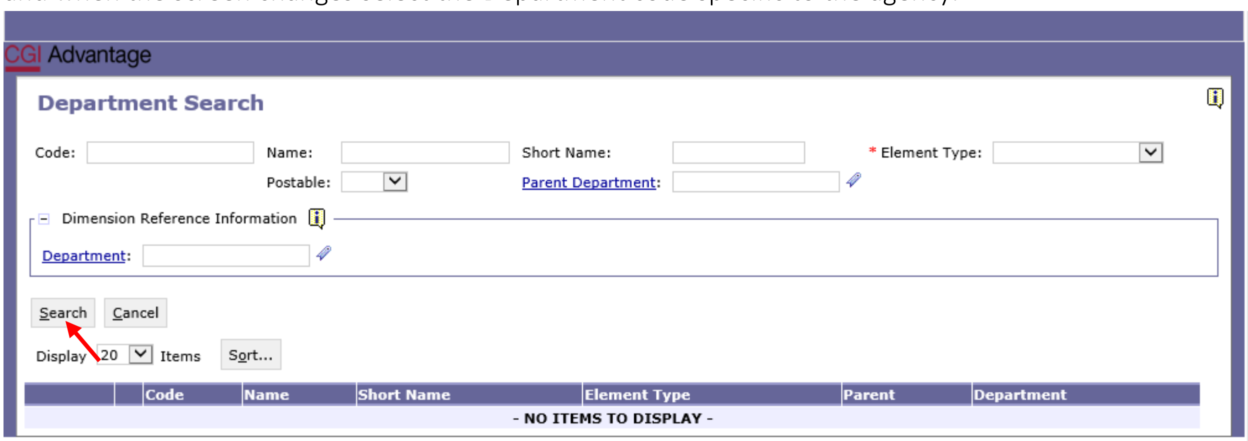
Budget Request Details for the Stage field should always remain on the default setting '1'. Description and Ranking Type will remain blank.



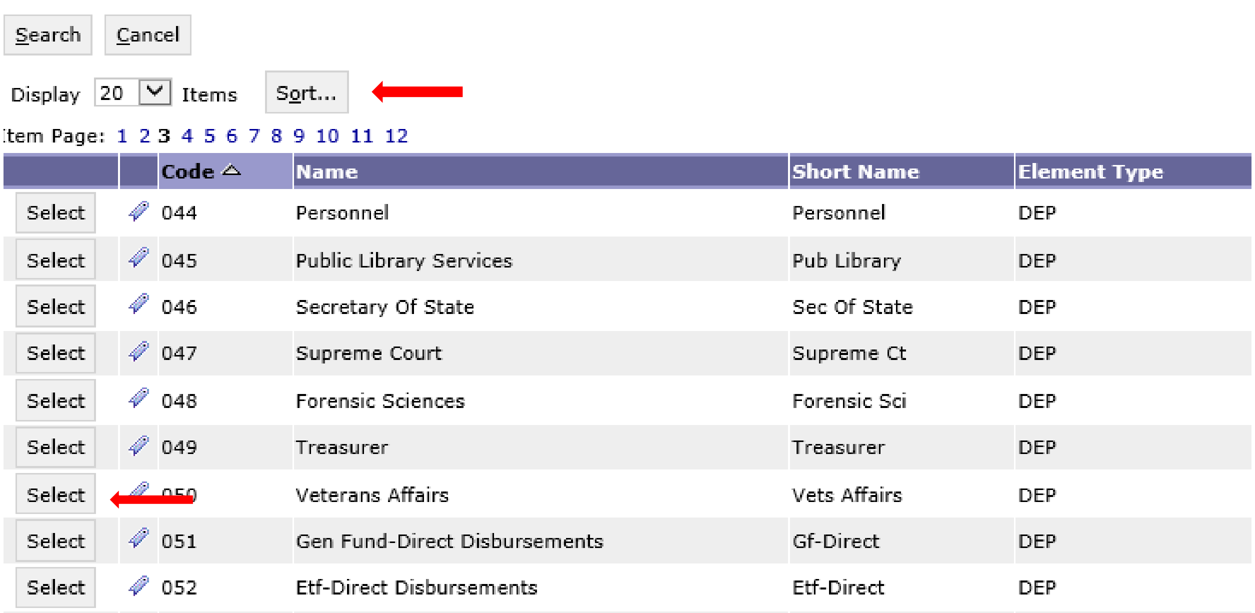
Step 4. Complete the Dimensions section in the bottom of the Create Budget Request screen by searching for each required field.

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.



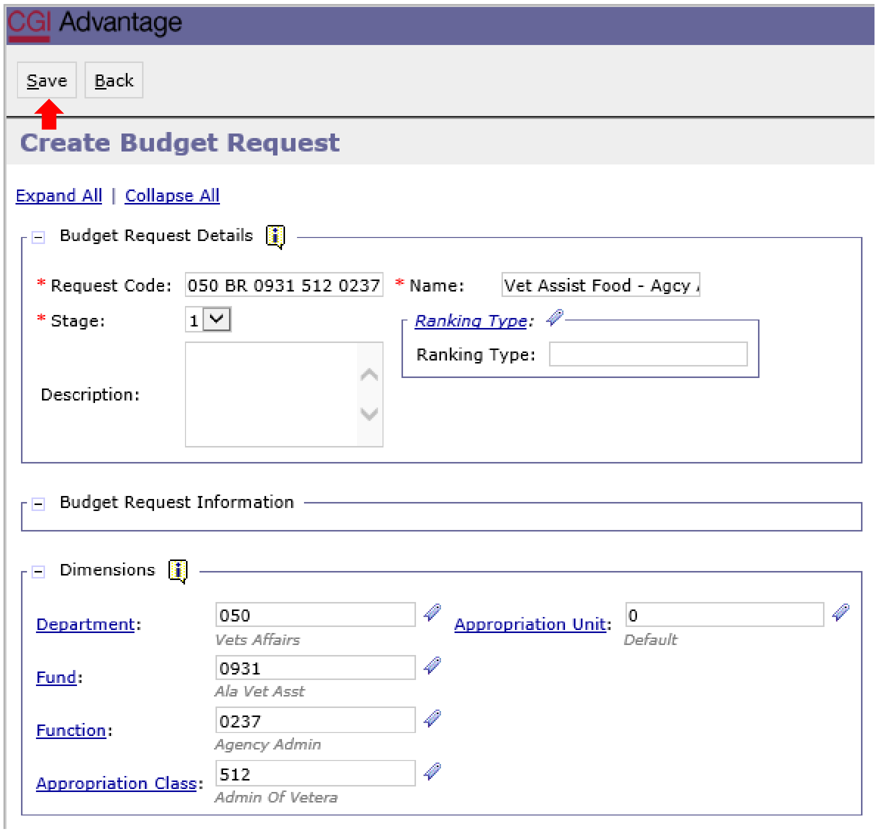
Step 6. If the information in the search box appears in random order, use the Sort... button to arrange in ascending or descending order for any field: code, name, short name or element type.



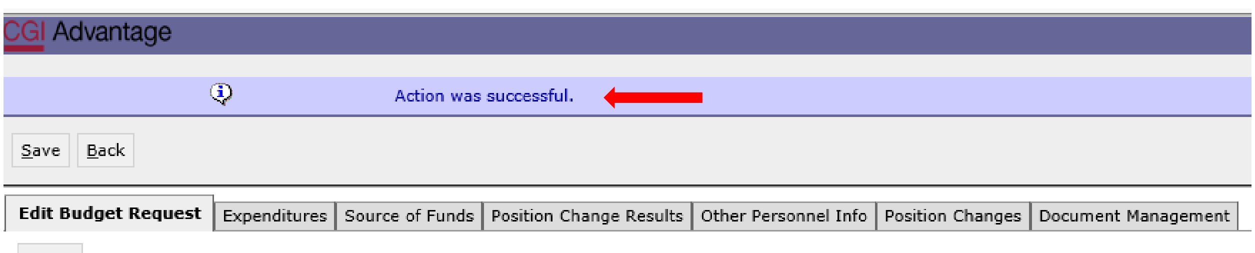
	Code	Name	Short Name	Element Type
Select	044	Personnel	Personnel	DEP
Select	045	Public Library Services	Pub Library	DEP
Select	046	Secretary Of State	Sec Of State	DEP
Select	047	Supreme Court	Supreme Ct	DEP
Select	048	Forensic Sciences	Forensic Sci	DEP
Select	049	Treasurer	Treasurer	DEP
Select	050	Veterans Affairs	Vets Affairs	DEP
Select	051	Gen Fund-Direct Disbursements	Gf-Direct	DEP
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.

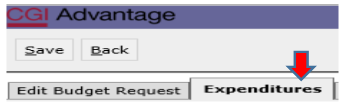
Step 8. Once complete, click Save at the top of the page. The Action was Successful message will appear.



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.



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.

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

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

Page 1 of 1 Show 20 rows per page Rows 1 - 17 of 17

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

Line	Budget Object			PY1 ACTUALS	CUR BUD	CY OPS PLAN CHANGE	BR CUR BUD UPDTD	REQUESTED AMOUNT	BR TOTAL REQUESTED
7	0125		E	800	0		0		0
8	0129		E	0	0		0		13,600
9	0201		E	126,199	1,200,027		1,200,027		95,035
10	0202		E	202,063	0		0		173,552
11	0203		E	461,940	0		0		336,600
12	0500		E	0	2,253,916		2,253,916		0
13	0800		E	0	455,000		455,000		0
14	0900		E	147,884	2,687,900		2,687,900		0
15	1100		E	40	1,000		1,000		0
16	1400		E	92,022	100,000		100,000		0
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

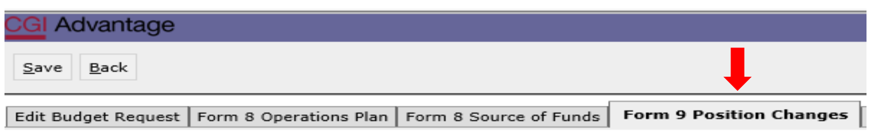
The **Position Change Tab** is used along with the Salaries Benefits Forecasting System (SBFS) projections commonly referred to as the SBFS Data Dump Report. However, you must run the SBFS report through STAARS infoAdvantage. Please refer to the STAARS infoAdvantage Manual for state agencies instructions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

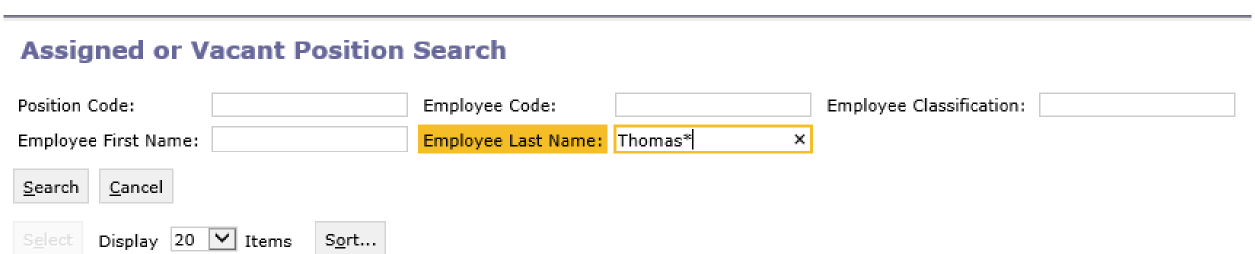
Step 1. Select the Form 9 Position Changes Tab.



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.



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 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.

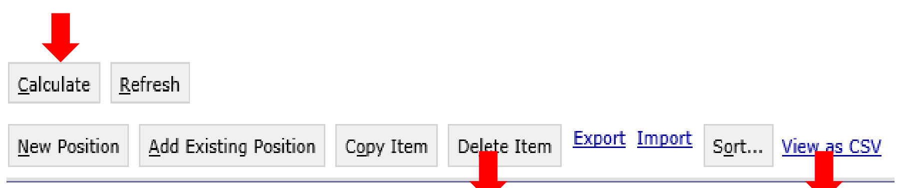
Summary						
☐	Pos No.	Emp No.	Classification	Grade	Step	Category
☐						
☐	0553273-005-1330	0000000173	10613	078	08	

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

<u>STAARS BUDGETING DEFAULT SETTING</u> - 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.

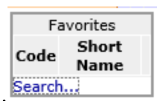
Step 7. Once all of the required information has been entered click Calculate. Note the calculated salary and total cost fields are updated to reflect the changes.



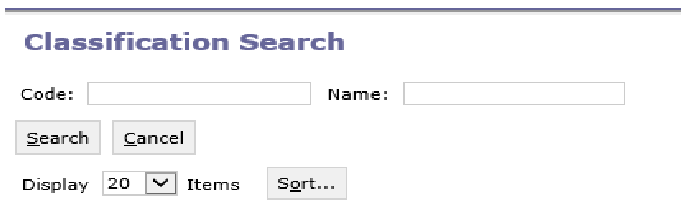
Salary Percentage	Benefit Percentage	Calculated Salary	Current Salary	Cost
100	100	-60,898.102008		-85,668.104918

<u>B. ADDING AN EMPLOYEE OR NEW POSITION</u>

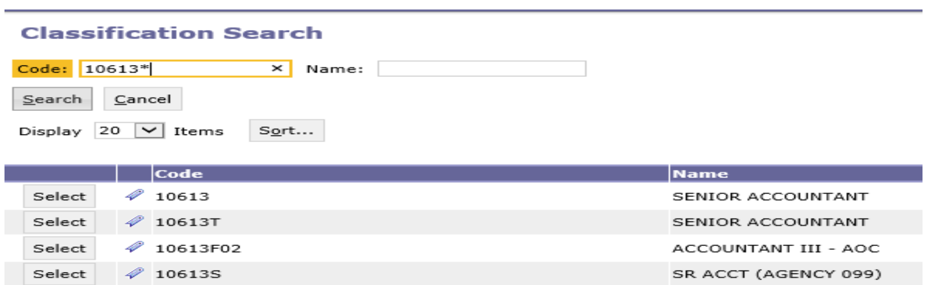
Step 8. To ADD a new hire or add an existing employee to a new chart of account combination, click New Position. New Position A new line will be added to the Position Changes tab.

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

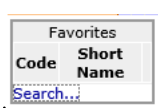
Step 10. The Classification Search page will display. Click Search again.



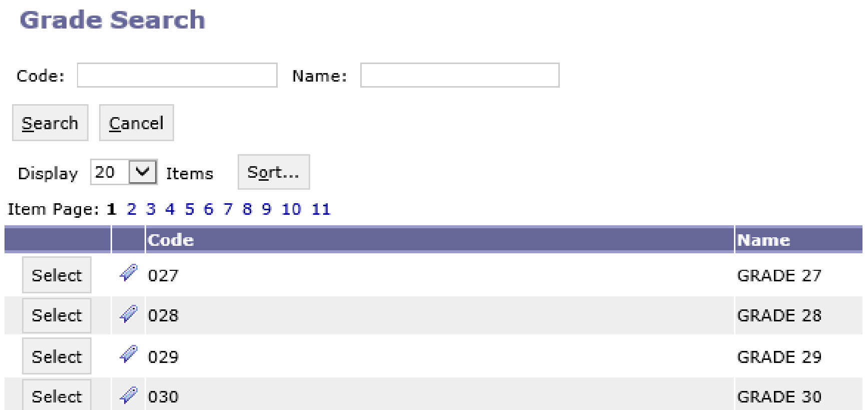
Step 11. Using the wildcard (*), search for the classification by Code or Name of the new hire or employee you are adding. Example: 10613*



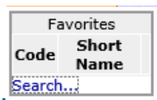
Step 12. Select the Classification, and the data will populate in the Position Changes tab.

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

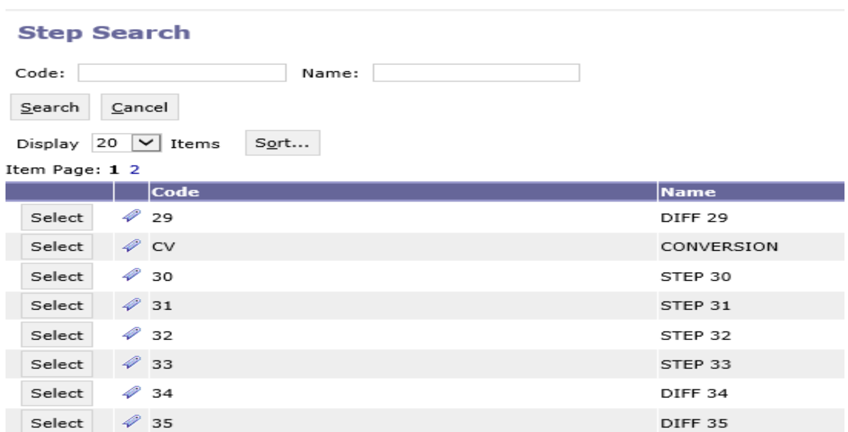
Step 14. The Grade Search screen will appear. Select the appropriate Grade, and the data will populate in the Position Changes tab.



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

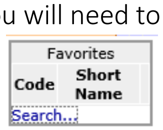


Step 16. The Step Search screen will display, click Search again for the list to populate. Select the appropriate step.



<u>STAARS BUDGETING DEFAULT SETTING</u> - For a new hire starting at a step greater than Step 1, you <u>must</u> 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

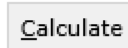
Step 20. In the FTE field, enter the desired FTE percentage:

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.

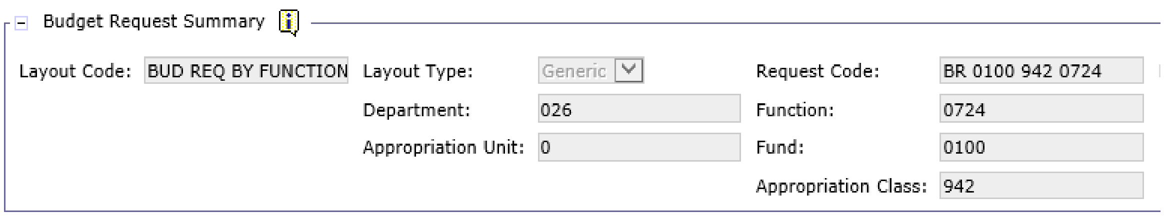
The SBFS projections does not project any type of raises for non-merit employees. Therefore, to adjust the salaries for non-merit employees and all corresponding benefits you will need to use the Form 9 Position Changes tab to remove the employee at the old rate and return them to the budget request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

POSITION CHANGE RESULTS TAB

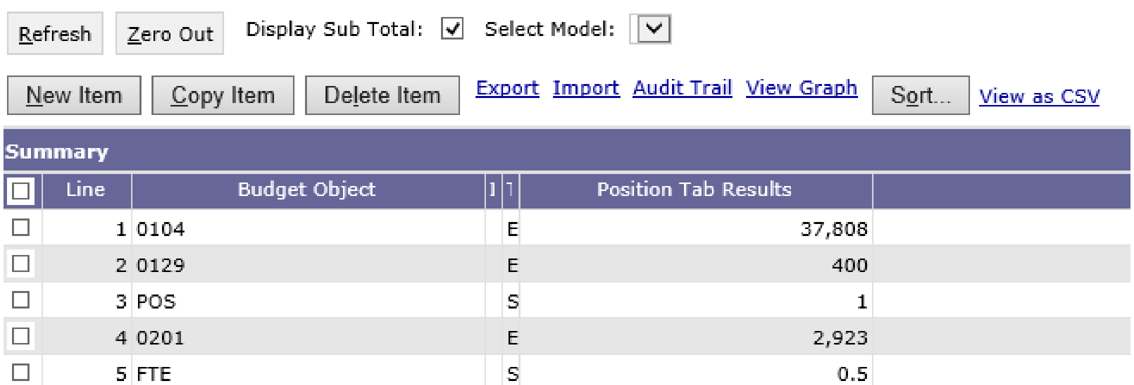
Use this tab to review the changes made on the Position Change tab.

Step 1. Click on the Position Change Results tab.

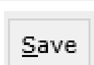
Step 2. Notice the Chart of Account Elements affected in the Budget Request Summary section.



Step 3. Check the employee information for accuracy.

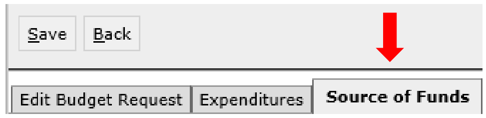


Line	Budget Object		Position Tab Results
1	0104	E	37,808
2	0129	E	400
3	POS	S	1
4	0201	E	2,923
5	FTE	S	0.5

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

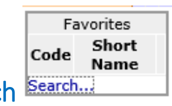


Use this tab to identify the Sources of Funds expended for each Function (Activity) created on the Expenditures tab (Form 5).

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.

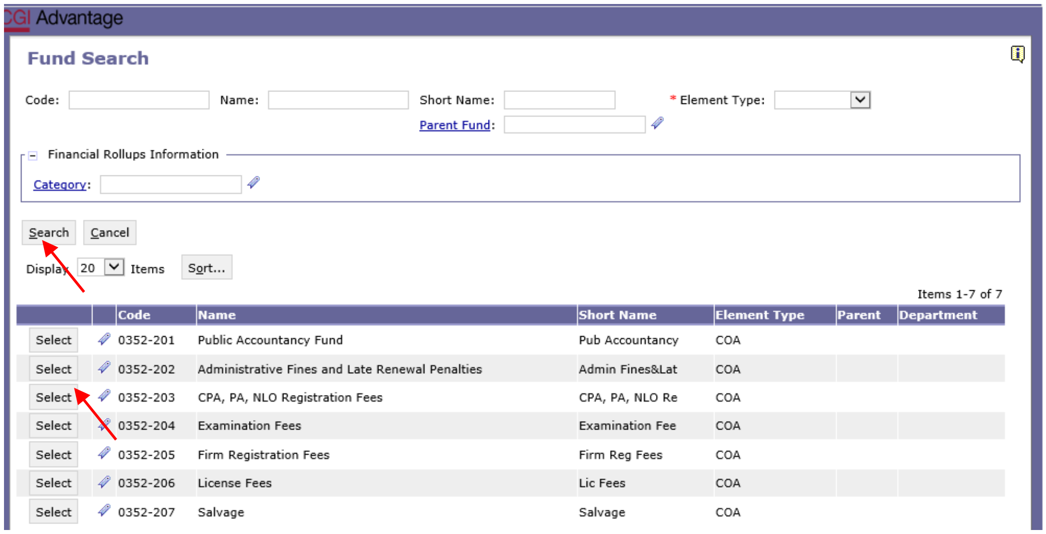
NOTE: <u>ALL</u> General Fund or Education Trust Fund appropriations to a department should be reflected as one source of fund on any Form 5. Detailed information should be reflected on the Form 1 Receipts.

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

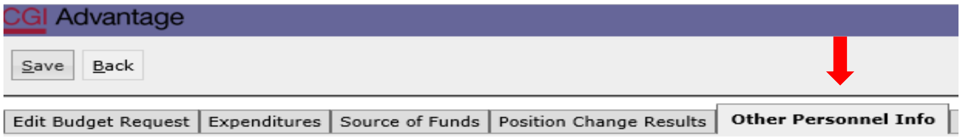
However, the agency should include details for earmarked funds.

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.



<u>OTHER PERSONNEL INFO TAB</u>



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.

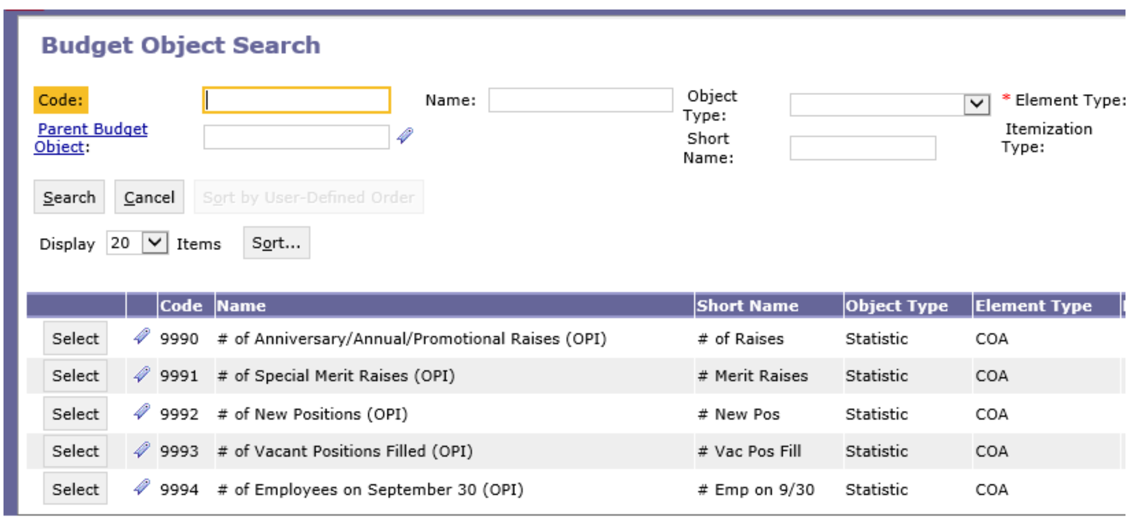
Note: Every <u>Bud Req by Function</u> (Form 5) will have the Other Personnel Info tab. Remember, to only enter this information on one Form 5 in the <u>Bud Req by Function</u> section.

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

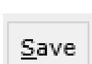
Step 4. Click New Item 

and right Click in the Budget Object field to Search 

The Budget Object Search screen will appear.



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.

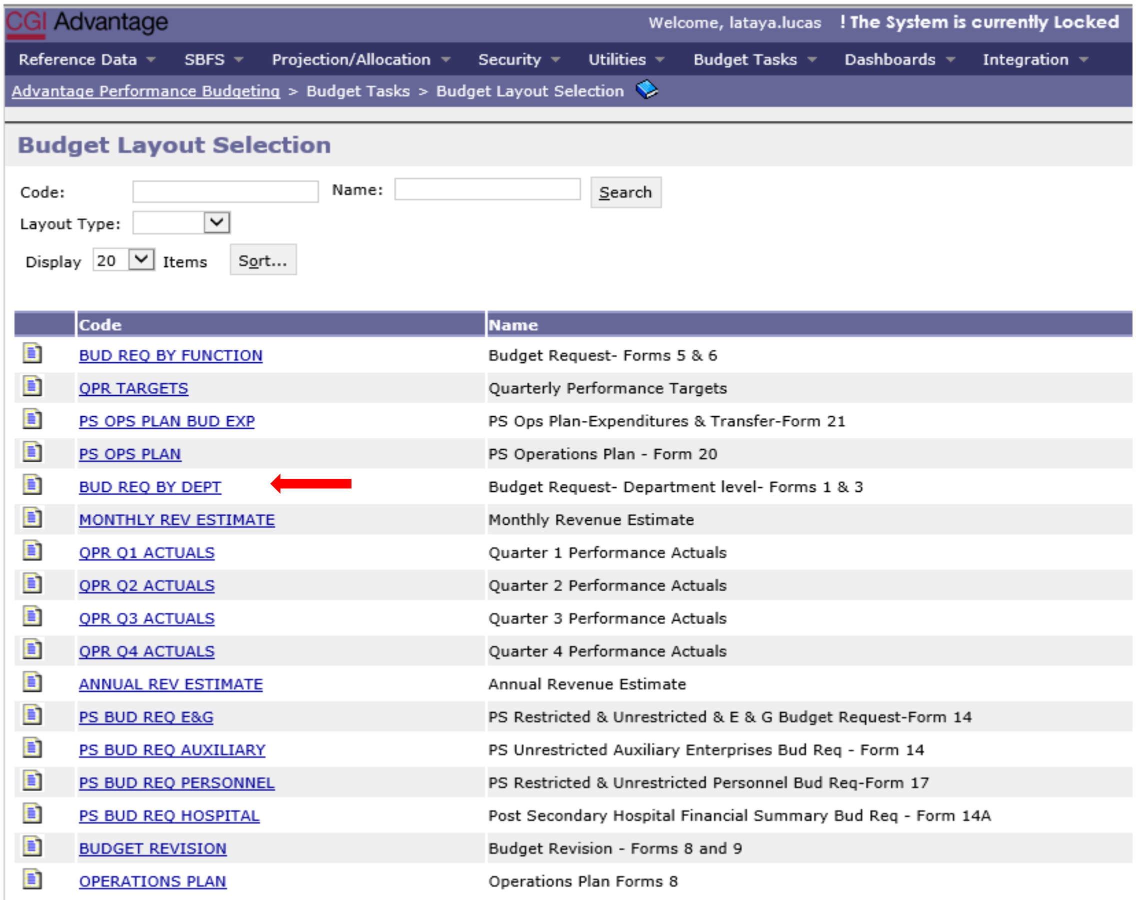
Step 6. Click Save 

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.

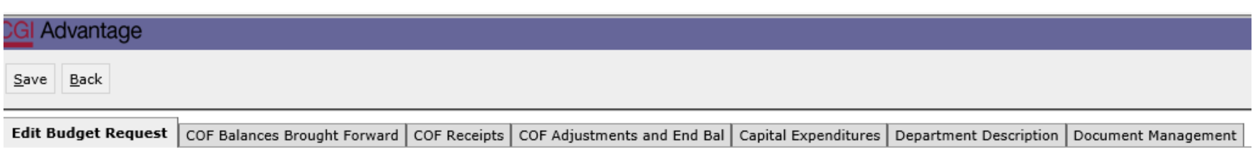
FORMS 1 & 3 – BUD REQ BY DEPARTMENT LEVEL

BUD REQ BY DEPT

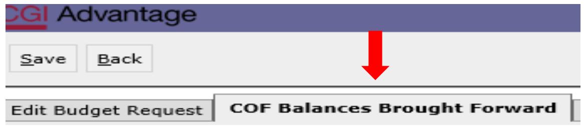


Step 2. On the Select Budget Request screen click Search. Select the agency form that is populated.

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.



COF BALANCES BROUGHT FORWARD TAB

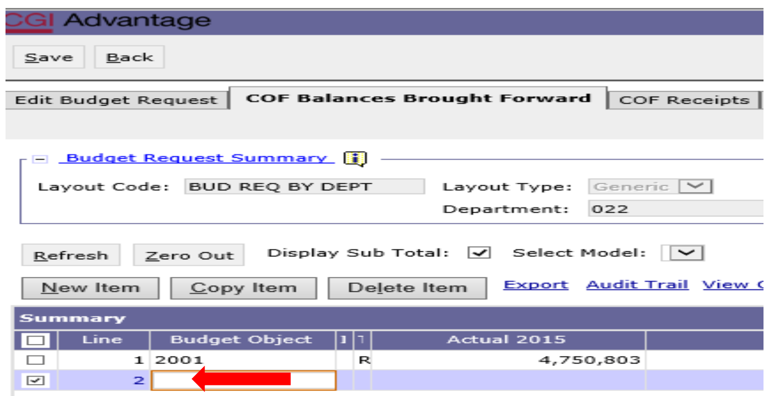


Step 1. Select the COF Balances Brought Forward Tab.

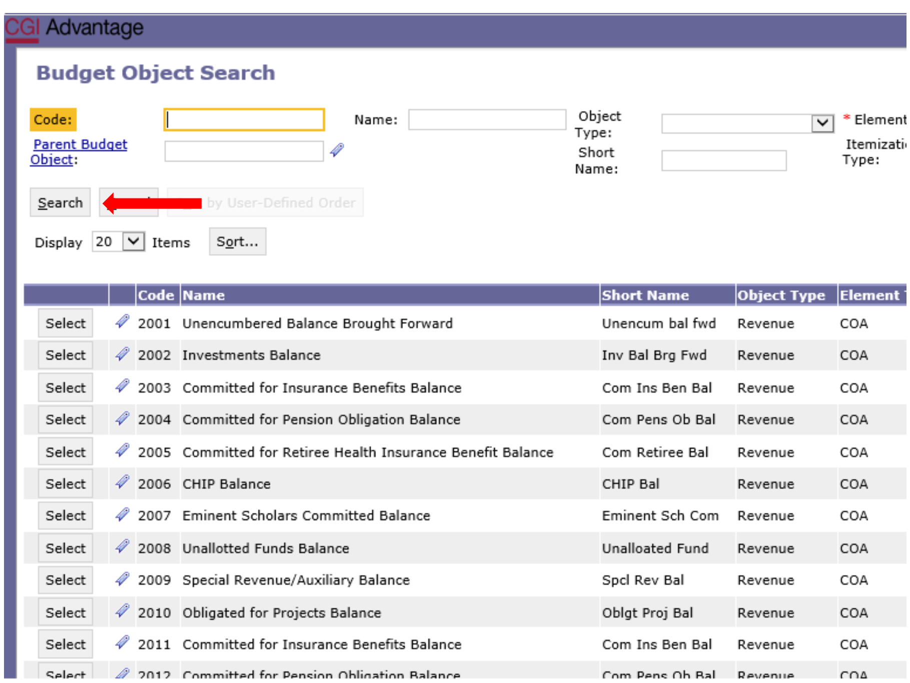
Step 2. Select New Item 

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.

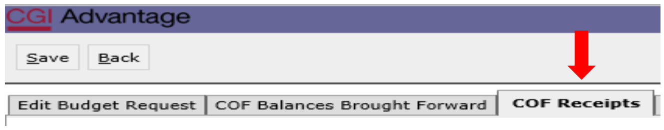


Step 4. Select the code(s) necessary to complete the department's Condition of Funds for Form 1 that reflects Unencumbered Balance(s) Brought Forward. Below is a snapshot of the section from Form 1 that you will be preparing on the COF Balance Brought Forward tab.

Step 5. Once complete click Save 

at the top of the page. Action was Successful message will appear.

<u>COF RECEIPTS TAB</u>



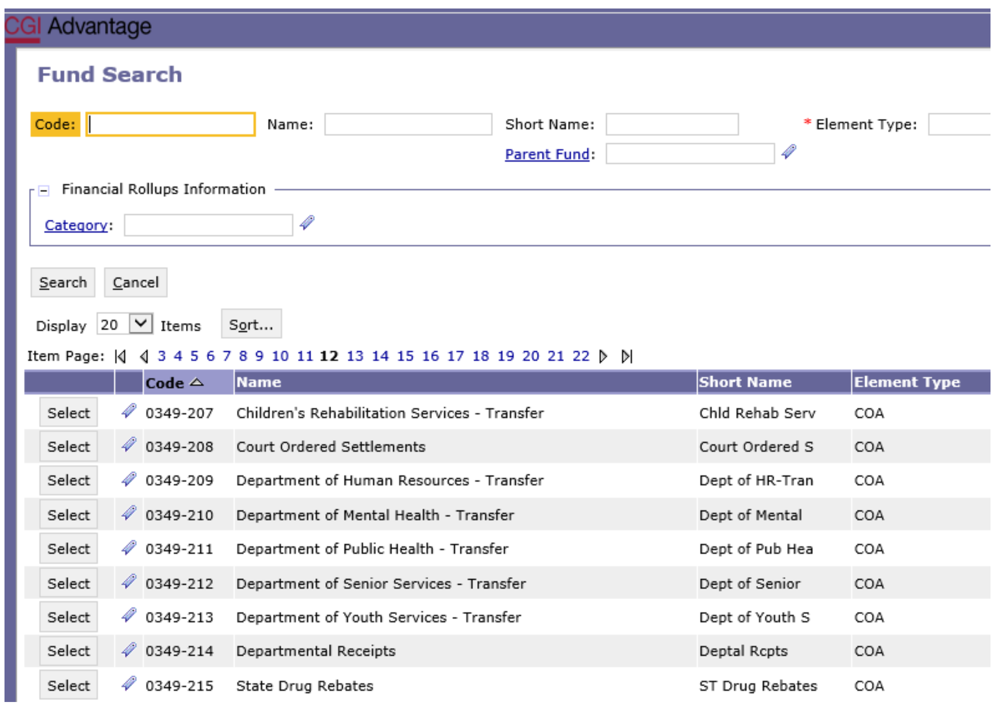
Step 1. Select the COF Receipts Tab.

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.

Step 5. Once complete click Save 

at the top of the page. Action was Successful message will appear.

<u>COF ADJUSTMENTS AND ENDING BALANCE</u>

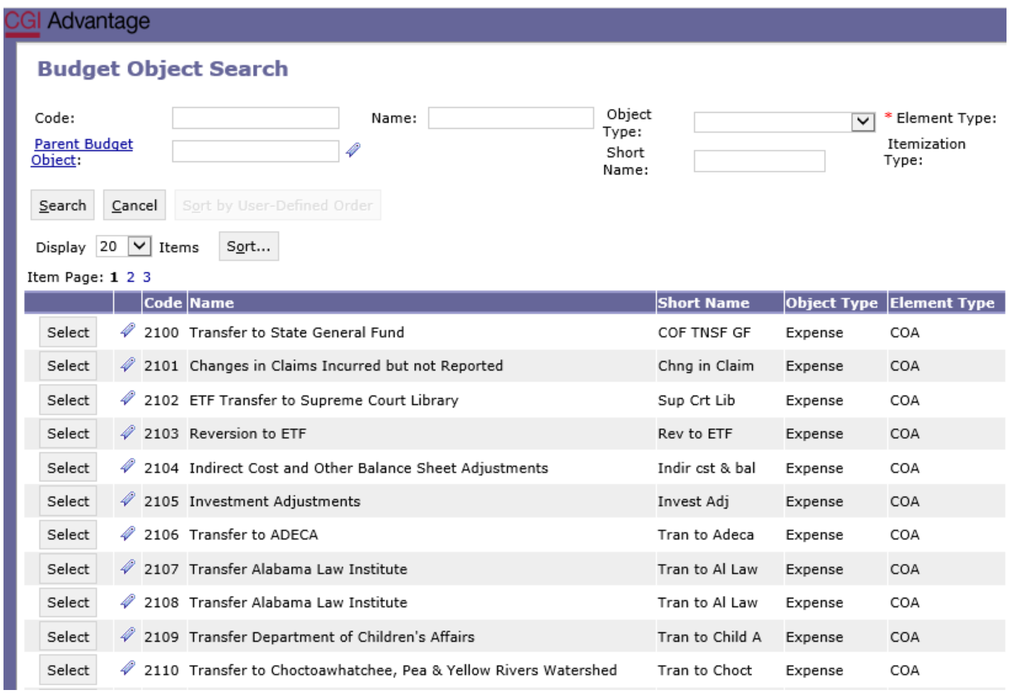
Step 1. Select the COF Adjustments and End Bal Tab.

Step 2. Select New Item 

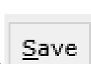
to insert a new line that will allow you to add the Department's current data for Actual, Budgeted and Requested Receipts related the fiscal years at the time of Budget Request preparation.

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.

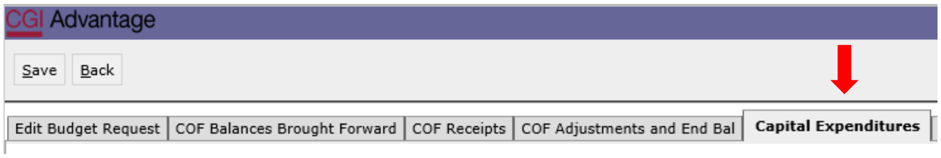


	Code	Name	Short Name	Object Type	Element Type
Select	2100	Transfer to State General Fund	COF TNSF GF	Expense	COA
Select	2101	Changes in Claims Incurred but not Reported	Chng in Claim	Expense	COA
Select	2102	ETF Transfer to Supreme Court Library	Sup Crt Lib	Expense	COA
Select	2103	Reversion to ETF	Rev to ETF	Expense	COA
Select	2104	Indirect Cost and Other Balance Sheet Adjustments	Indir cst & bal	Expense	COA
Select	2105	Investment Adjustments	Invest Adj	Expense	COA
Select	2106	Transfer to ADECA	Tran to Adeca	Expense	COA
Select	2107	Transfer Alabama Law Institute	Tran to Al Law	Expense	COA
Select	2108	Transfer Alabama Law Institute	Tran to Al Law	Expense	COA
Select	2109	Transfer Department of Children's Affairs	Tran to Child A	Expense	COA
Select	2110	Transfer to Choctoawhatchee, Pea & Yellow Rivers Watershed	Tran to Choct	Expense	COA

Step 4. Once complete click Save 

at the top of the page. Action was Successful message will appear.

CAPITAL EXPENDITURES TAB - (FORM 3)

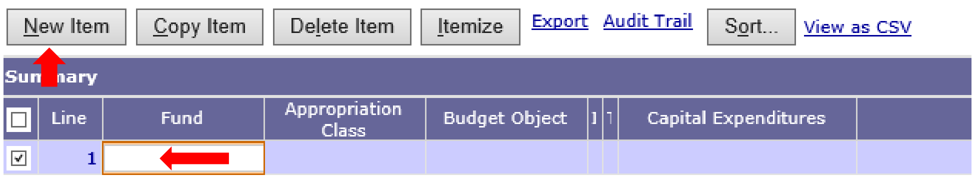


The following steps will need to be followed for each capital expenditure line requested in the Budget Request.

Step 1. Select the Capital Expenditures Tab.

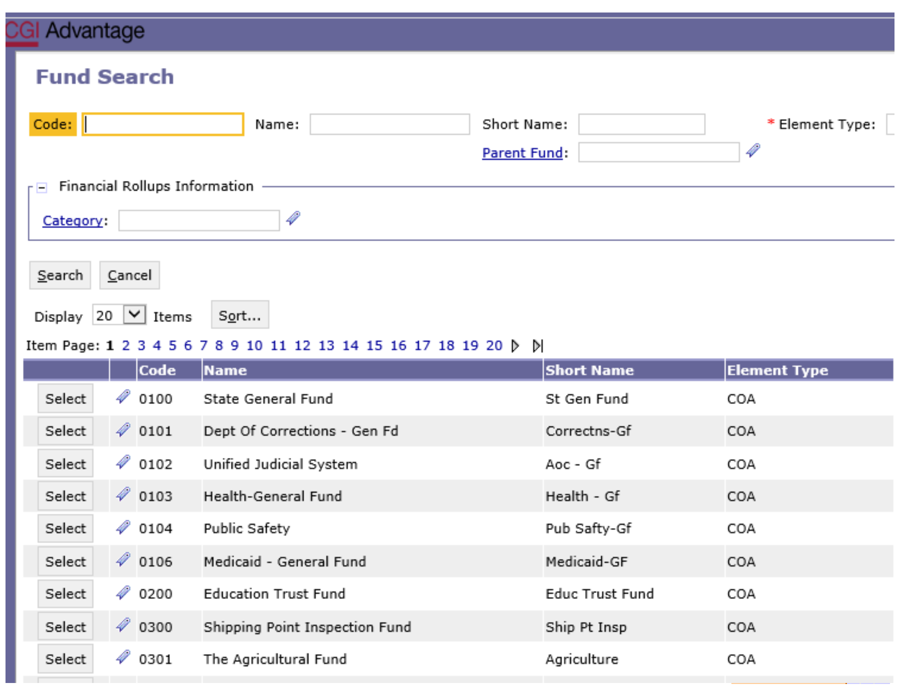
Step 2. Select New Item 

to insert a new line for each Capital Expenditure being requested by the Department on Form 3.



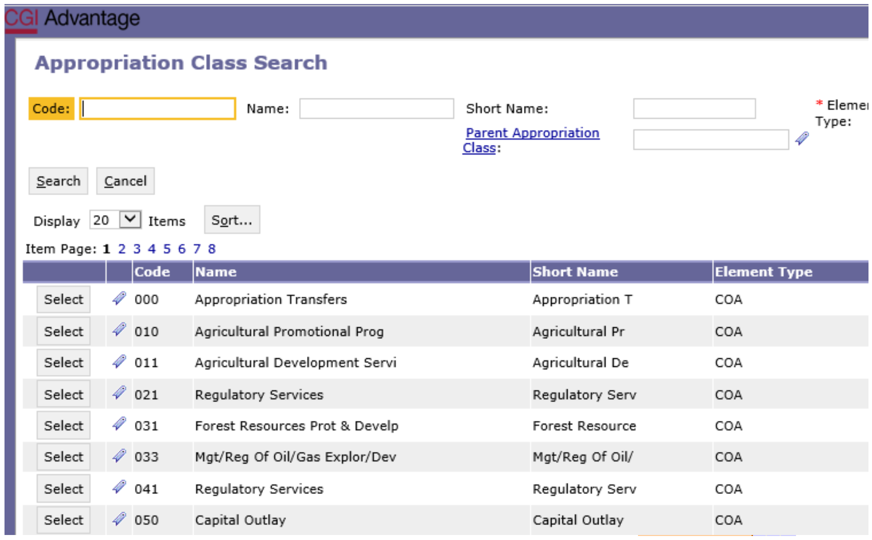
Step 3. In the Fund field right click and then select Search 

. 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.



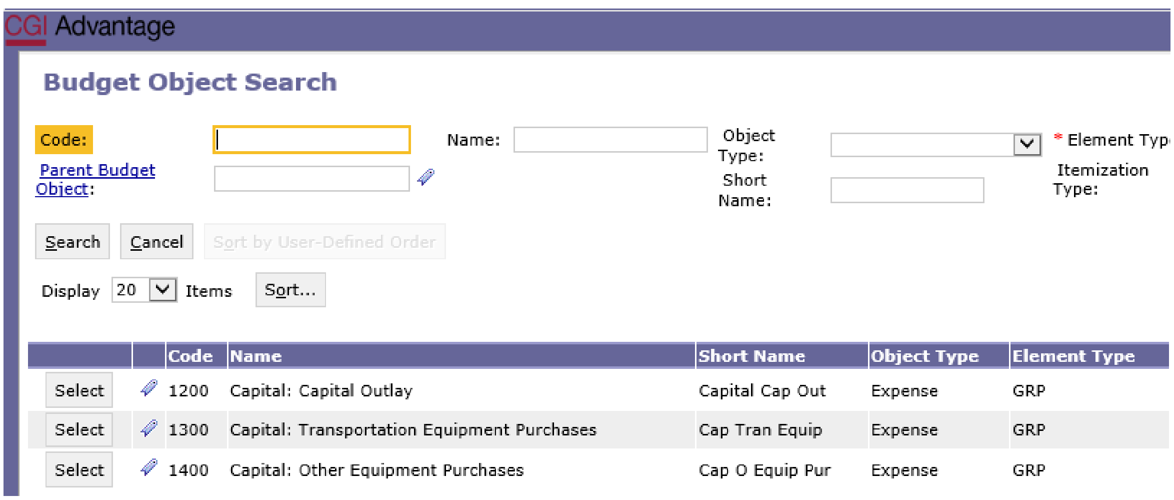
Step 4. In the Appropriation Class field right click and then select Search. 

The Appropriation Class Search screen will appear, click Search again for the department's appropriation classes to populate.

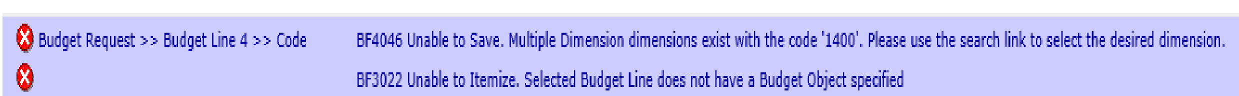


Step 5. In the Budget Object field right click and then select Search. 

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.



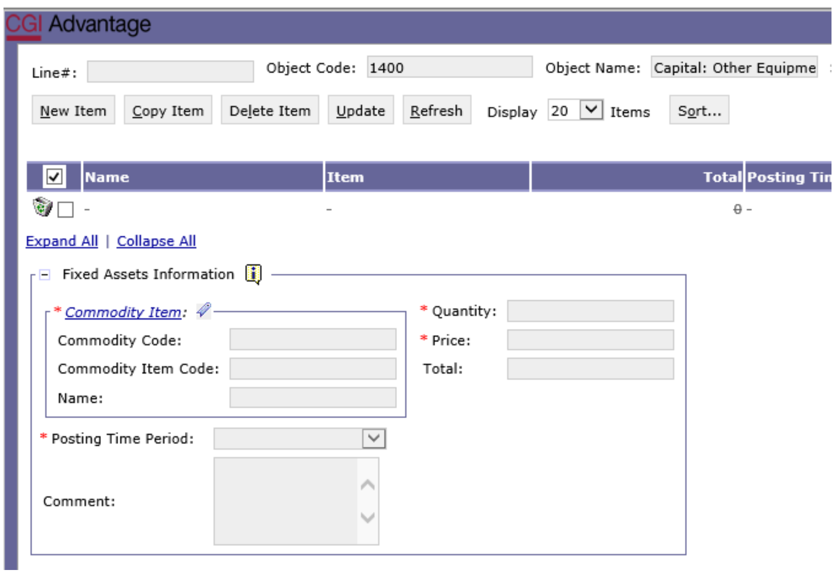
Common ERROR MESSAGE: - “Multiple dimensions exist” indicates that the budget object should be searched and selected rather than keyed directly as 1200, 1300, or 1400.



Step 6. In the Capital Expenditures field Click Itemize .

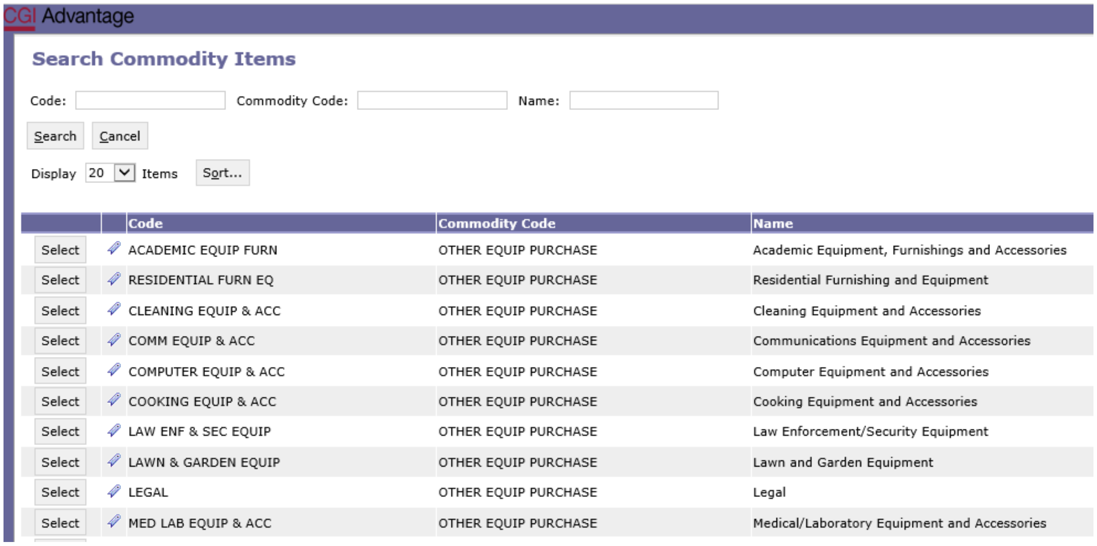
Step 7. The Capital Expenditure screen will change to the Fixed Assets Information screen and allow you to select the Commodity Item similar to the capital expenditure being requested. Once the screen changes, you MUST click New Item  to itemize the department's capital expenditures.

Step 8. Click on Commodity Item 

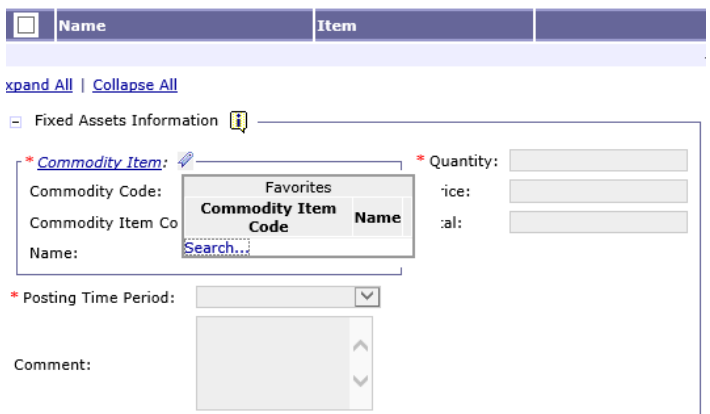


Step 9. The search box for Commodity Item Code 

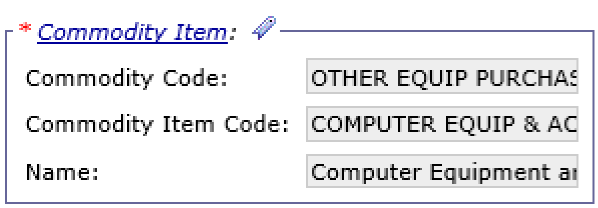
will appear. Click Search and the screen changes to the Search Commodity Items. Click Search again for the list to populate. Select the code appropriate for your capital expenditure being reported.



	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



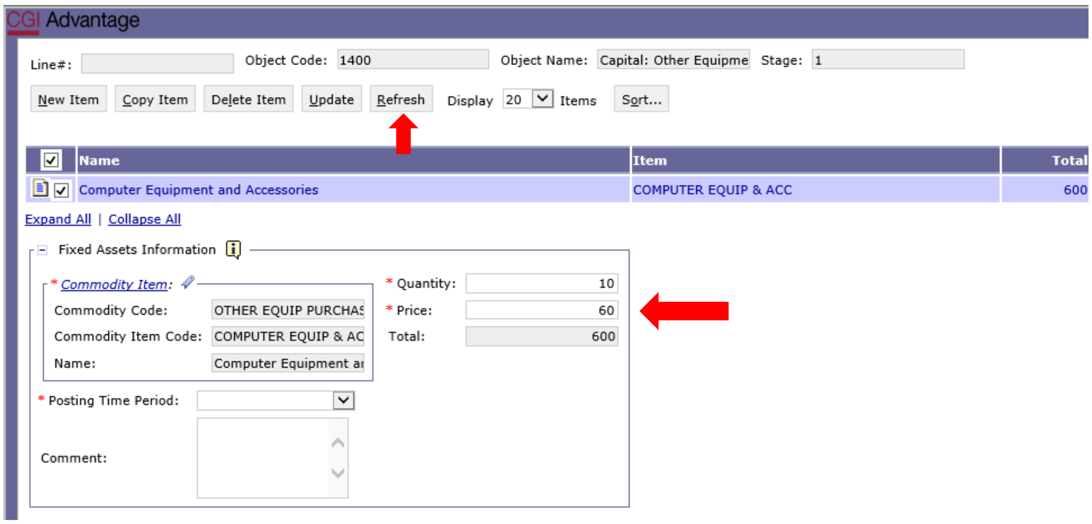
The Commodity Code, Commodity Item Code and Name fields will auto fill after your selection.



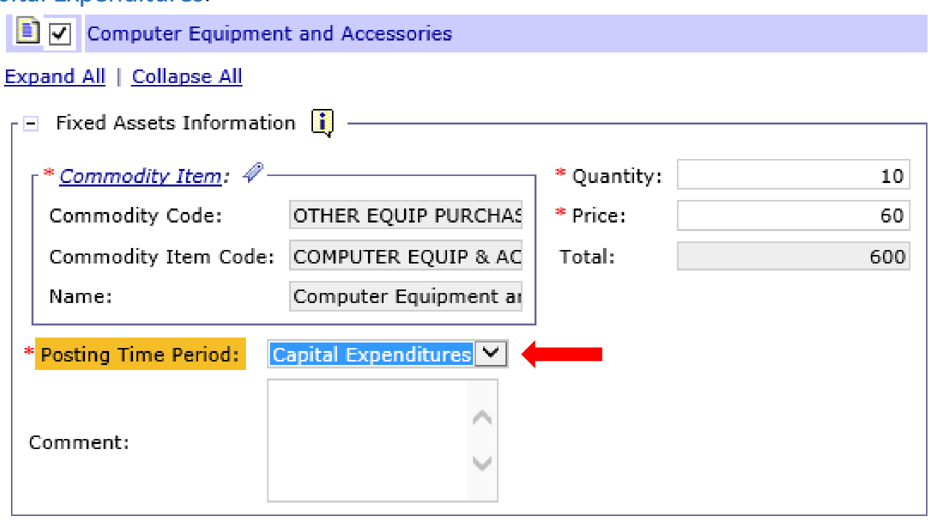
Step 10. Key the Quantity for the capital expenditure indicating how many items will be purchased. Example: 10 laptops.

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

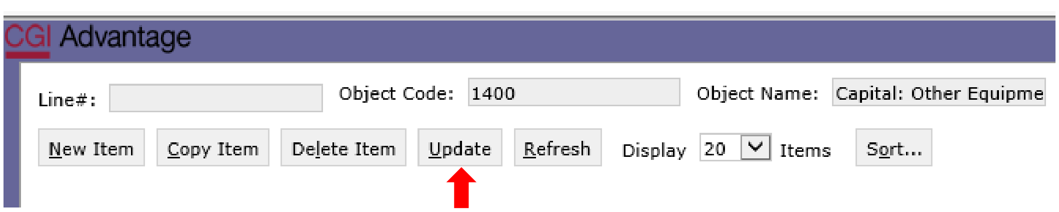
Step 12. Click REFRESH to view the calculations.



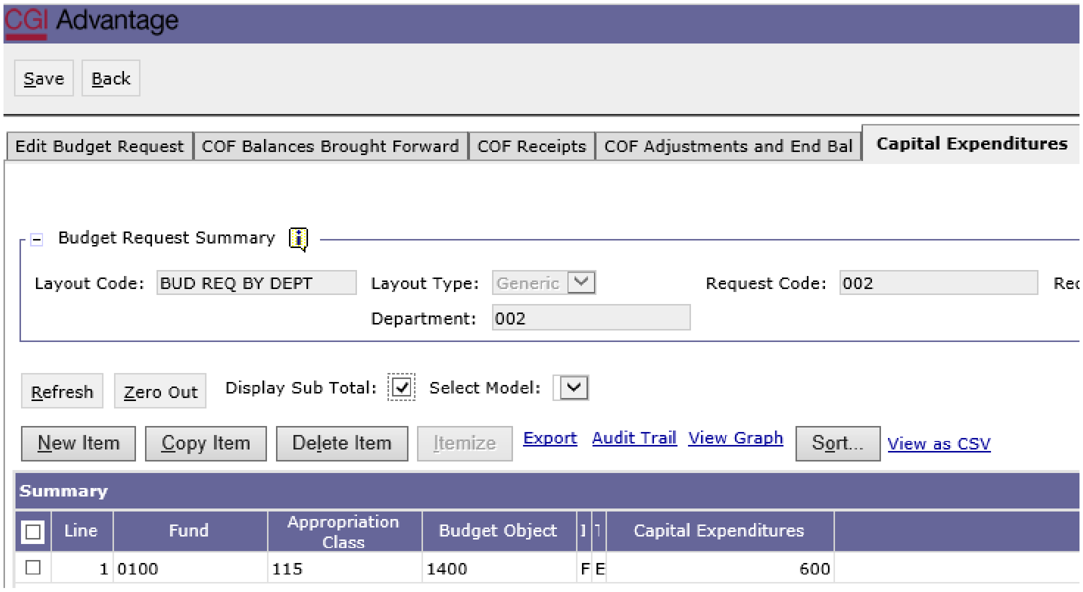
Step 13. You must also change the Posting Time Period. Use the dropdown arrow next to Posting Time Period to Select Capital Expenditures.



Step 14. Click Update.



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

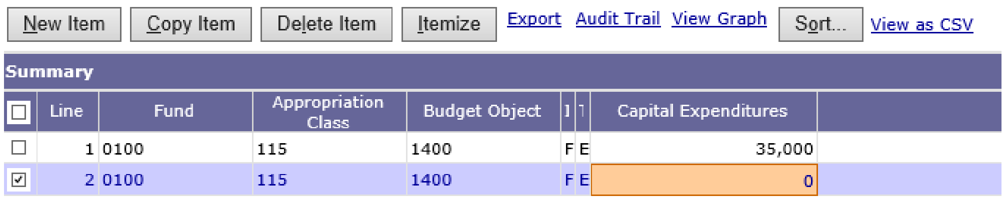


Step 15. Once complete click Save 

at the top of the page. Action was Successful message will appear.

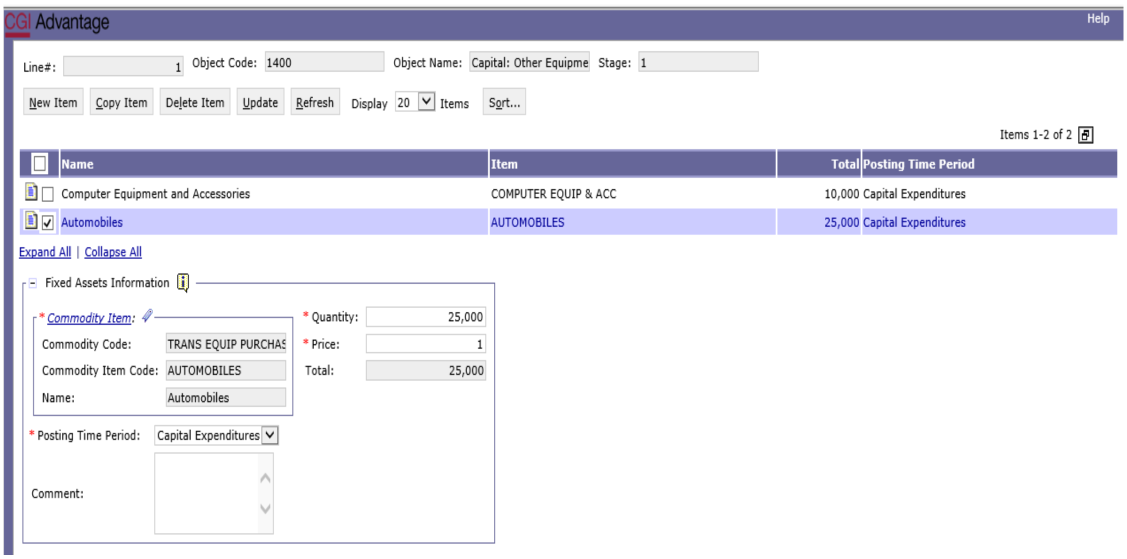
EDITING CAPITAL EXPENDITURES

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



Step 2. Click Itemize. 

The screen changes to the Fixed Assets Information screen. A listing of capital expenditures added to this point will appear.

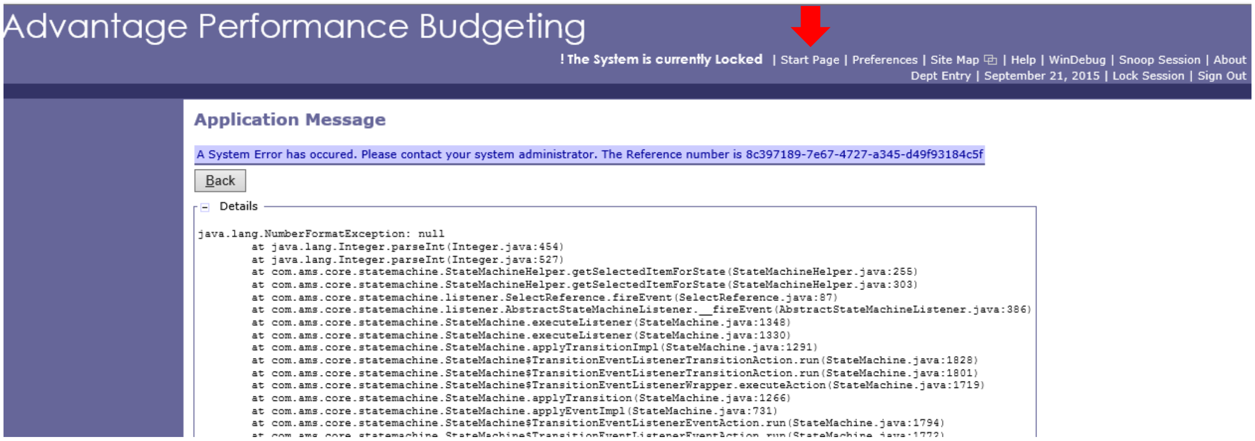


Step 3. Select the expenditure line that requires updating and that line of information will appear in the Fixed Assets Information screen.

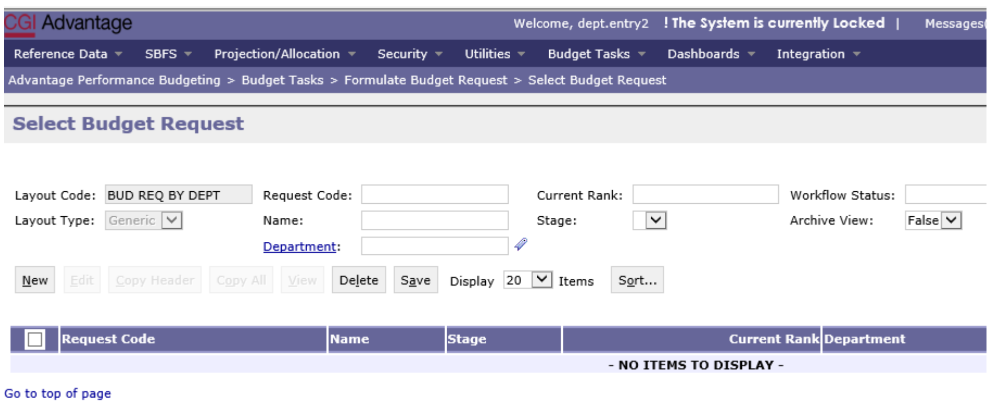
Step 4. Update the Commodity as desired.

Step 5. Remember to Refresh and Update once complete.

ERROR MESSAGE EXAMPLE



The 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

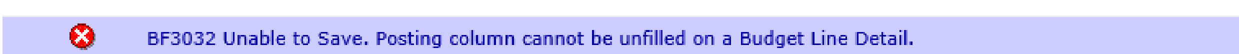


screen.

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



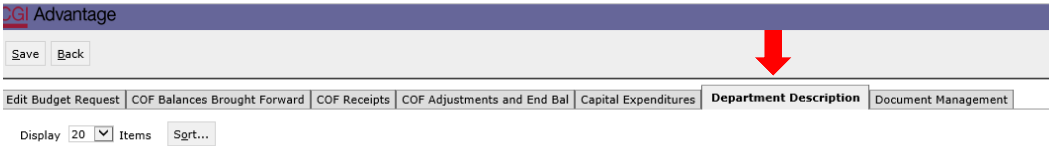
This message indicates the Posting Time Period was not updated. Review Step 13.

ERROR MESSAGE – EXAMPLE

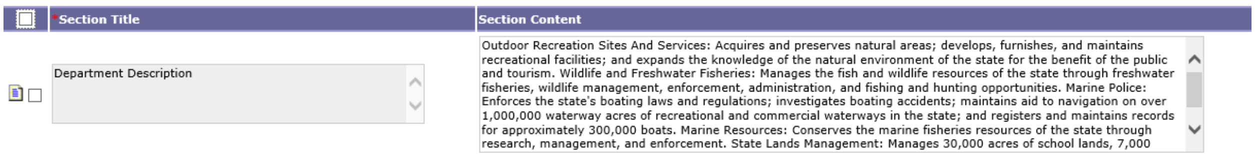
BF3035 Values were modified by a System Refresh of one or more Budget Line Details. Please return to the Budget Line Detail Page and check your data. Always refresh the Budget Line Detail Page after modifying an Budget Line Detail.

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

DEPARTMENT DESCRIPTION TAB



Step 1. Select the Department Description Tab.



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 

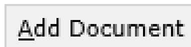
to exit. Action was Successful will appear.

DOCUMENT MANAGEMENT TAB

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

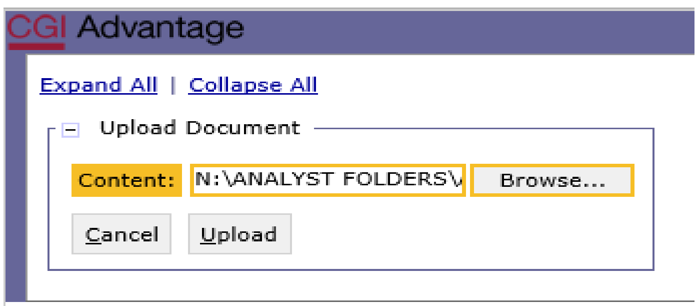
Step 1. Select the Document Management tab.

Step 2. Click Add Document.

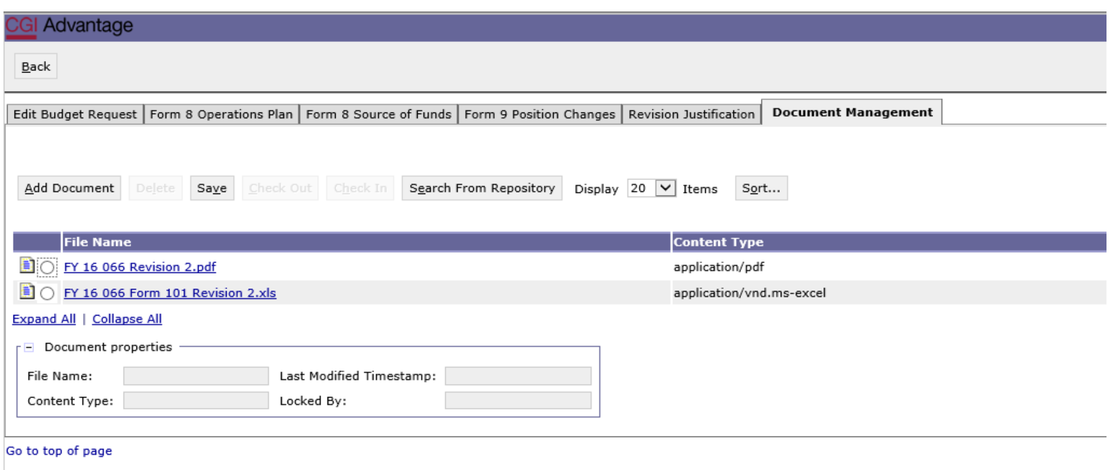


The following screen will display.

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 

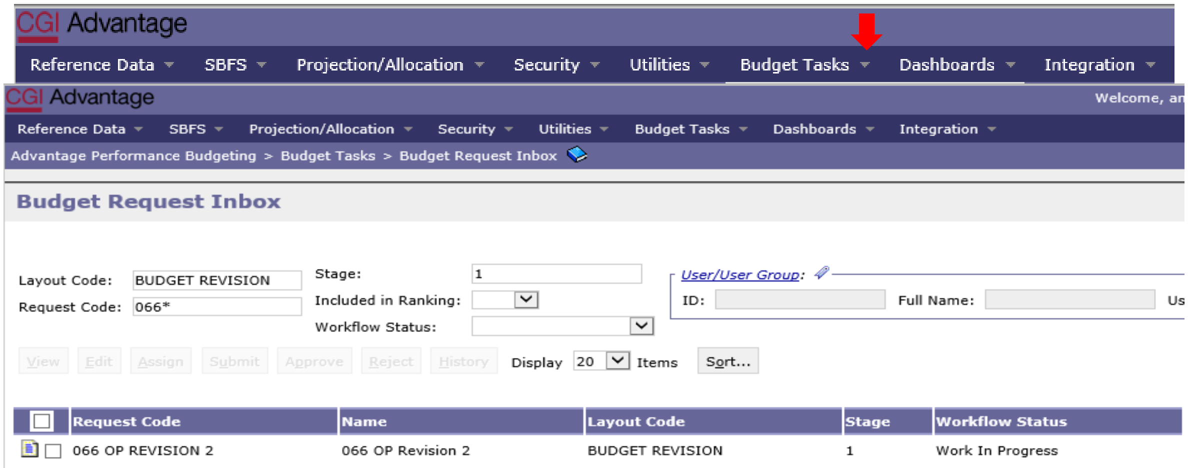
at the top of the page. Action was Successful message will appear.

Step 7. Click Back 

to exit out of the form.

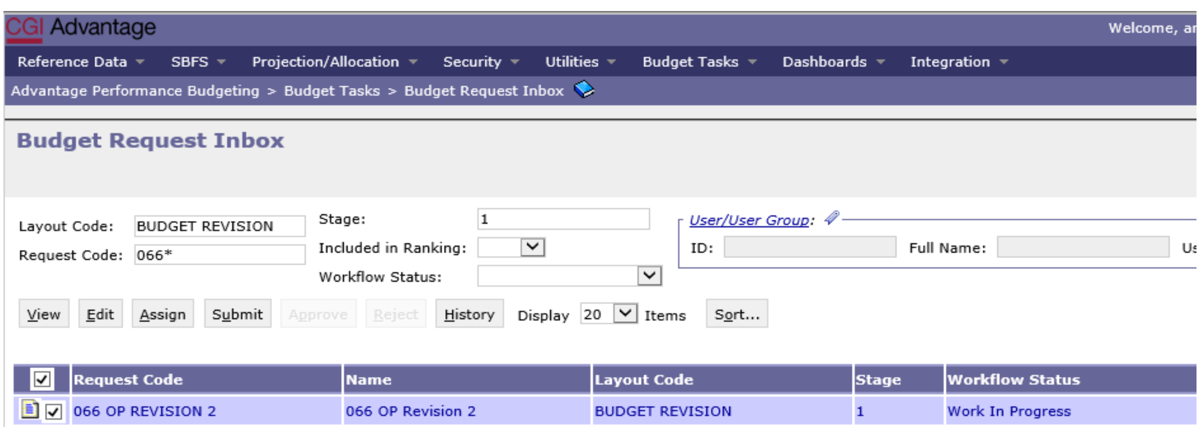
SUBMISSION

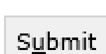
To submit the final Budget Request Packet return to the Budget Tasks drop down menu.



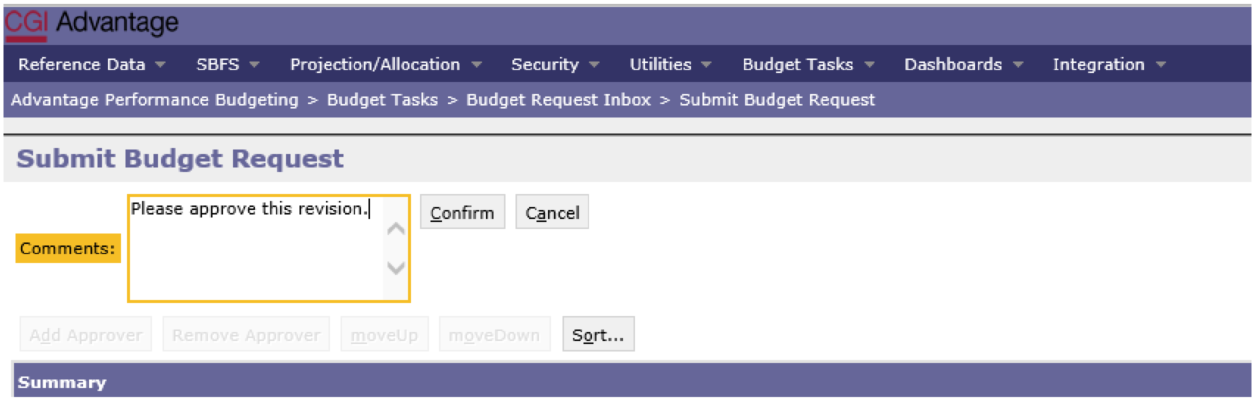
Step 1. Select Budget Request Inbox. The Budget Request Inbox will display.

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

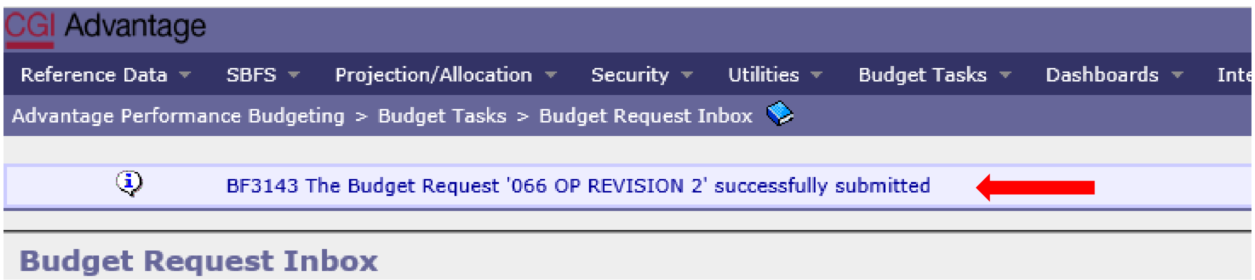


Step 3. Click Submit. 

The following screen displays, allowing you to add comments for the Executive Budget Office.



Step 4. Click Confirm. 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.

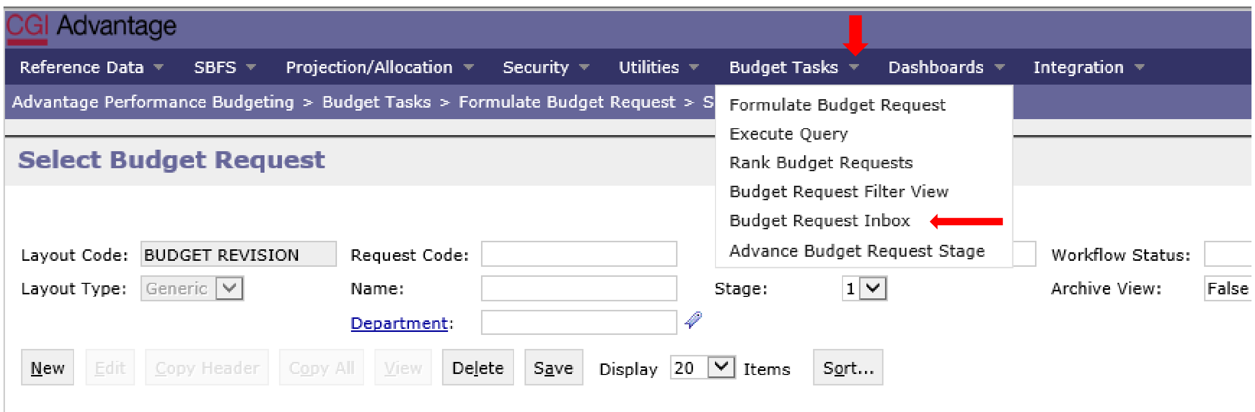


WORKFLOW

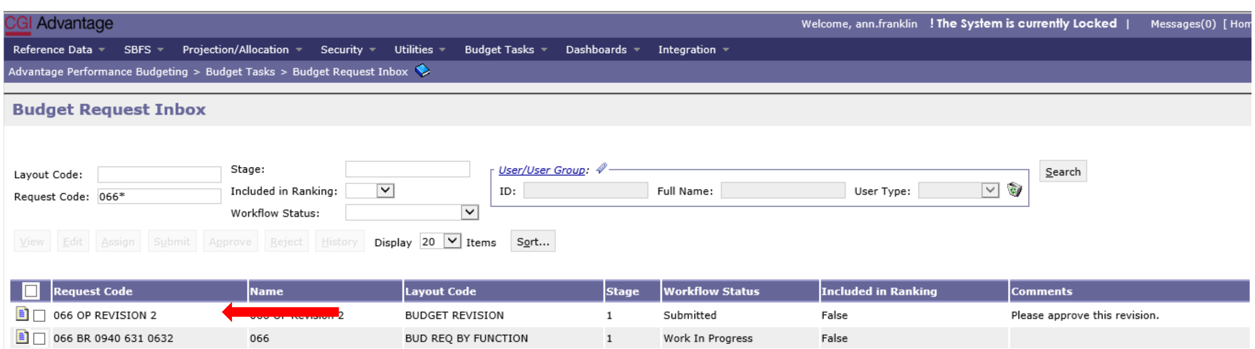
The 1st approver will receive an email. The email will include the comment along with a link to STAARS Budgeting.

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.



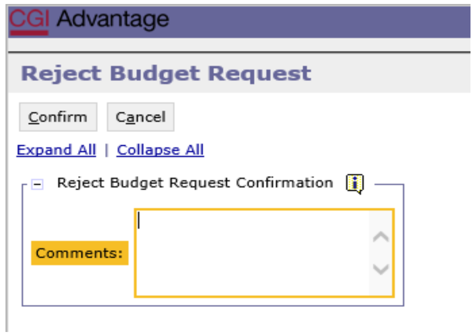
Step 2. The 1st approver will need to select the form(s).



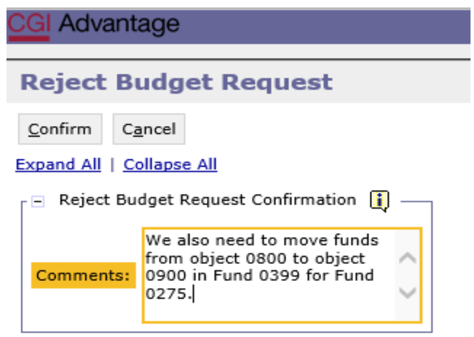
Step 3. To review the revision, click View.

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.



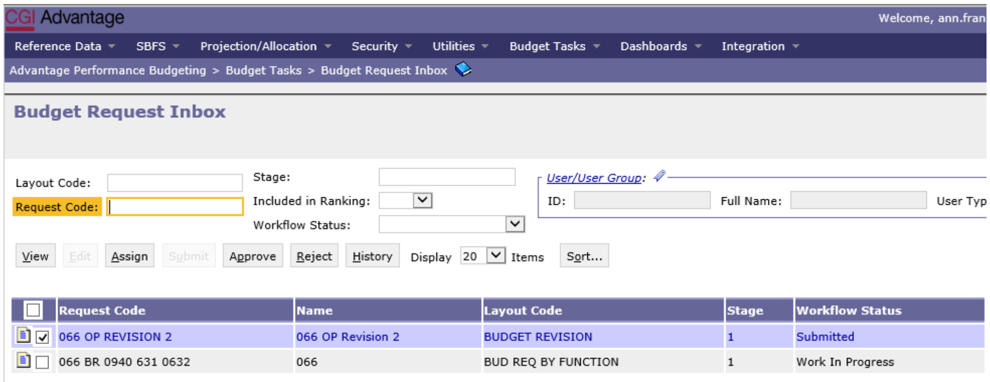
Step 6. Click Confirm. 

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.

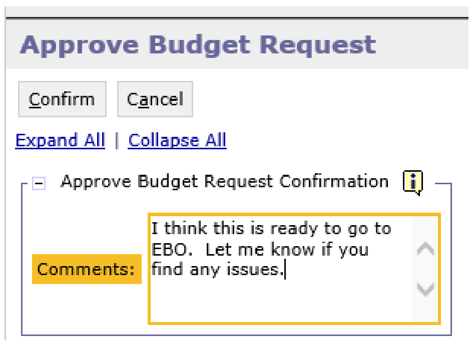
Step 7. Once the 1st approver receives the corrected Budget Request Packet, reviews and determines that is satisfactory the 1st approver can use the email received in Outlook to follow the link and now approve the form(s) by clicking Approve. 



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

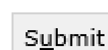
Step 9. Click Confirm 

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.

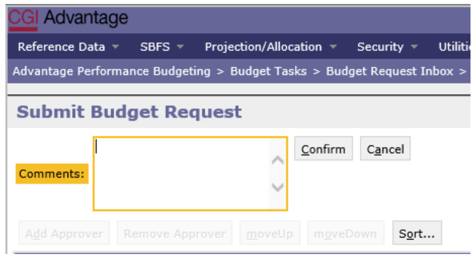
I think this is ready to go to EBO. Let me know if you find any issues. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

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. 

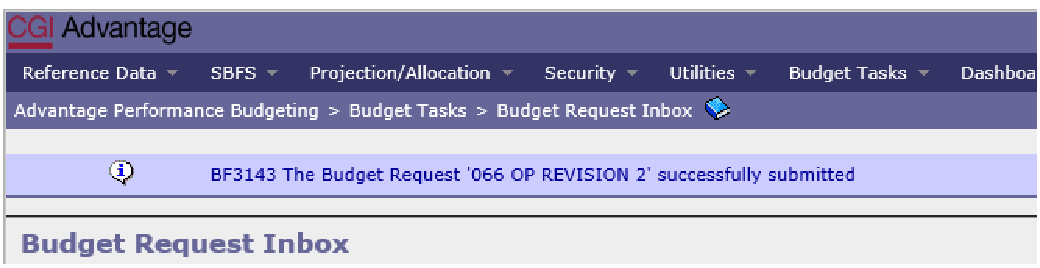
The Submit Budget Request screen displays.

Step 12. Click Confirm 

to submit the Budget Request Packet.



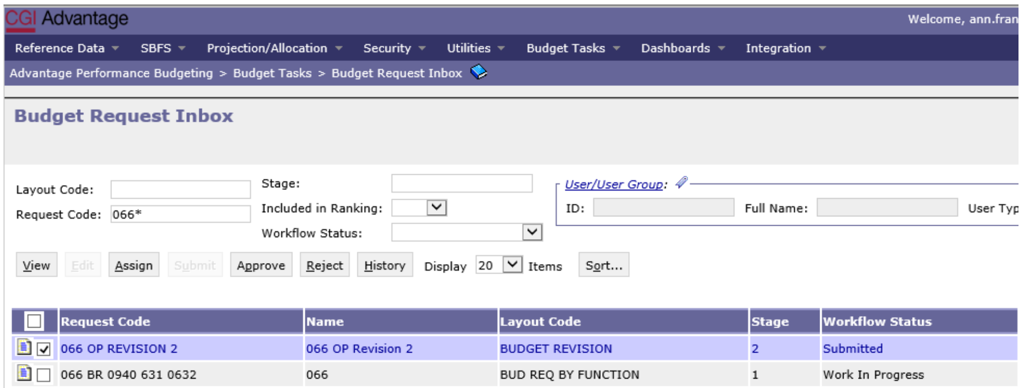
Step 13. You will return to the Budget Request Inbox and a message displays that the Budget Request was Successfully Submitted. The 2nd approver receives an email in Outlook indicating that the Budget Request has been submitted.



<u>ADDITIONAL OPTION - REJECTED</u>

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.

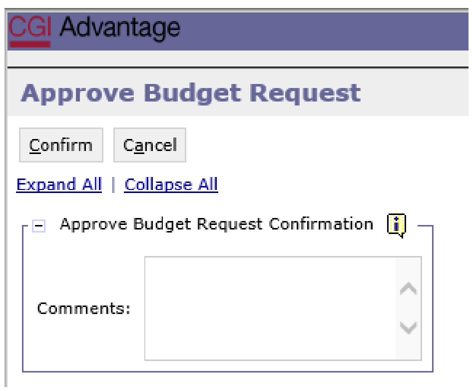
Step 14. Select the form(s), then click Approve. 



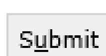
The Approve Budget Request screen displays, allowing for Comments.

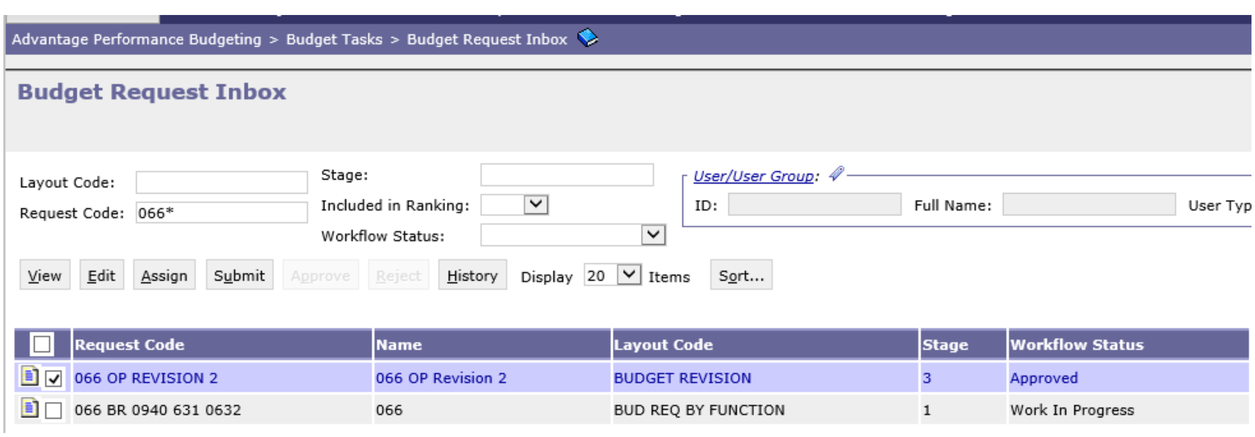
Step 15. Click Confirm 

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.

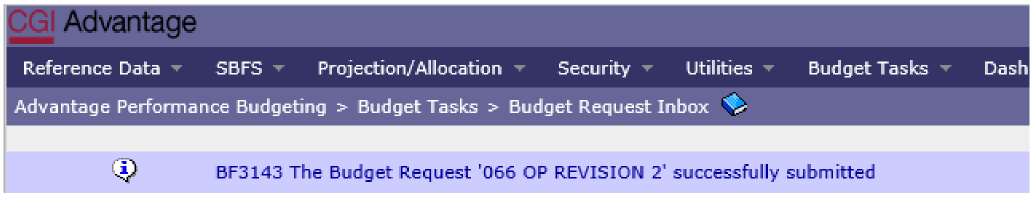
Step 16. Select the form(s), then click Submit. 



The Submit Budget Request screen displays.

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

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).