



Budget Revision Manual

For State Agencies and Post-
secondary Institutions

Executive Budget Office

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STAARS PERFORMANCE BUDGETING BUDGET REVISIONS MANUAL

Welcome to STAARS Performance Budgeting! Performance Budgeting is the system of record for budgeting for the State of Alabama. State agencies will complete budget revision Forms 8 and 9 using tabs within Performance Budgeting. These forms will be rolled up to create the Budget Revision packet that will be submitted to the Executive Budget Office through electronic workflow.

BUDGET REVISION FORMS

- Form 8 – Summary Budget Revision (system generated)
- Form 8 – Function and Fund Level
- Form 9 – Staffing Plan

Note: Form 9-Staffing Plan will be automatically generated by Performance Budgeting. However, if your agency selects to modify object 0100 for Personnel Cost by keying directly on the Form 8 in PB, an updated manual Form 9 should be added the Document Management tab for submission to EBO. A template can be found on EBO's website: [Agency Forms](#)

TO ACCESS STAARS PERFORMANCE BUDGETING (PB):

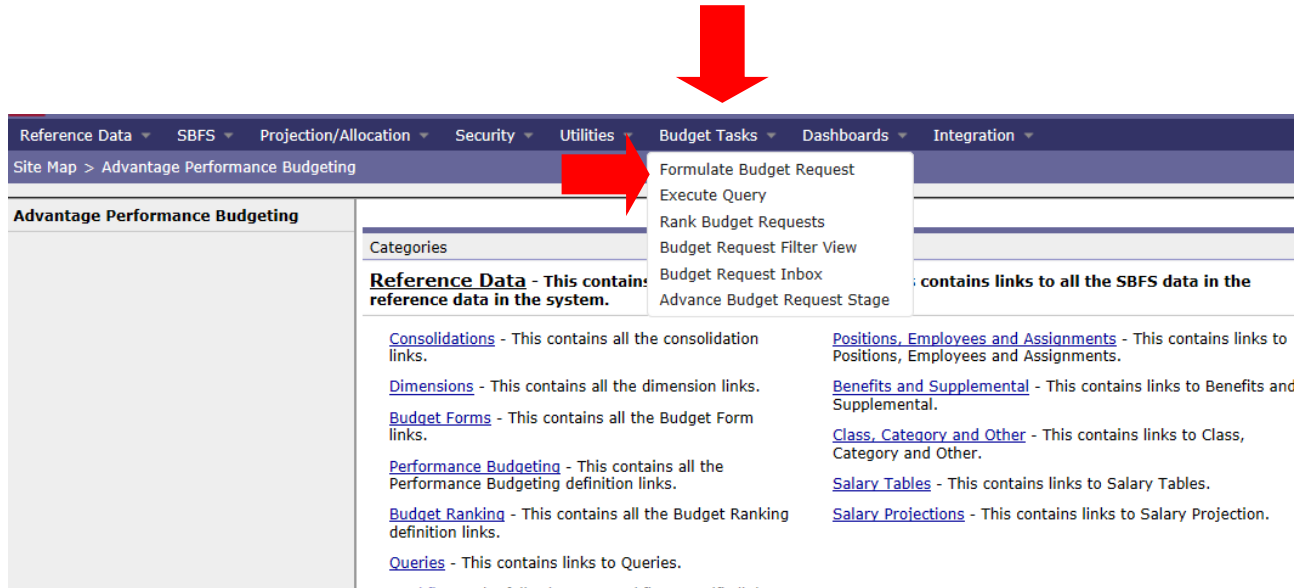
STAARS Performance Budgeting has a separate login URL and screen than STAARS Financials. Access to two different areas of STAARS will be required to complete your agency's Operation Plan. Operations Plan forms will be completed in the STAARS Performance Budgeting (PB) application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the Operations Plan Packet generated in PB.

- To access Performance Budgeting (PB): <https://budget.staars.alabama.gov>
- To access reports in infoAdvantage: <https://staarsinfo.alabama.gov/BOE/BI>
- Agencies with access to STAARS Financials should access infoAdvantage through Financials.

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

BUDGET REVISIONS MANUAL

After logging into STAARS Budgeting, begin by clicking the down arrow next to **Budget Tasks** on the task bar. Then select **Formulate Budget Request** on the drop-down menu.



The screenshot shows the STAARS Budgeting interface. At the top, there is a navigation bar with several dropdown menus: Reference Data, SBFS, Projection/Allocation, Security, Utilities, Budget Tasks, Dashboards, and Integration. Below this, the breadcrumb trail reads 'Site Map > Advantage Performance Budgeting'. The 'Budget Tasks' dropdown menu is open, showing options: Formulate Budget Request, Execute Query, Rank Budget Requests, Budget Request Filter View, Budget Request Inbox, and Advance Budget Request Stage. A red arrow points to 'Formulate Budget Request'. Below the navigation bar, the 'Advantage Performance Budgeting' section is visible, containing a list of links and descriptions for various budgeting components:

- [Reference Data](#) - This contains reference data in the system.
- [Consolidations](#) - This contains all the consolidation links.
- [Dimensions](#) - This contains all the dimension links.
- [Budget Forms](#) - This contains all the Budget Form links.
- [Performance Budgeting](#) - This contains all the Performance Budgeting definition links.
- [Budget Ranking](#) - This contains all the Budget Ranking definition links.
- [Queries](#) - This contains links to Queries.
- [Positions, Employees and Assignments](#) - This contains links to Positions, Employees and Assignments.
- [Benefits and Supplemental](#) - This contains links to Benefits and Supplemental.
- [Class, Category and Other](#) - This contains links to Class, Category and Other.
- [Salary Tables](#) - This contains links to Salary Tables.
- [Salary Projections](#) - This contains links to Salary Projection.

The **Budget Layout Selection** screen will appear. The code name below is used to for Forms 8 and 9 for Budget Revisions: **BUDGET REVISION - Forms 8 and 9**

Note: Form 9-Employee Staffing Plan will be generated by STAARS Budgeting after completion of Form 8. If a manual (Excel) Form 9 was submitted with Operations Plan, the Form 9 will need to be updated to reflect changes in the 0100-object code. If applicable, Form 101 will also be automatically created based on entries created in Form 8.

FORMS 8 and 9 – BUDGET REVISION

Step 1. Select **BUDGET REVISION** under the Code section to begin creating Form 8 for the revision.

CGI Advantage ! The System is currently Locked

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

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

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 **New**.

CGI Advantage Welcome, dept.entry2

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

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

Select Budget Request

Layout Code: Request Code:

Layout Type: Name: Current Rank:

Department: Stage:

Display Items

The **Create Budget Request** screen appears.

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details

* Request Code: 069 FY18 OP REV 4 * Name: 069 FY18 OP REV 4

* Stage: 1

Description:

Ranking Type: Ranking Type:

Budget Request Information

Dimensions

Department: 069

Step 3. Complete the required fields in the **Budget Request Details** section by entering your agency information for the Form 8 as follows:

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

REQUEST CODE EXAMPLE: 069 FY OP REV 4**

Agency Number (3 digits)

FY**

OP REV

Then the sequential revision number

Follow the same format for the Name field

NAME EXAMPLE: 069 FY19 OP REV 4

Step 4. Enter the **Department** number in the **Dimensions** section at the bottom of the header page.

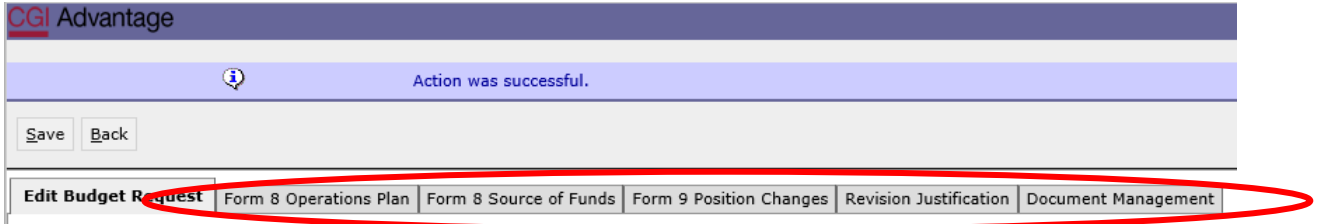
Dimensions

Department: 069
Accs

Step 5. 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 the Form 8 and 9

revision. The tabs are: **Form 8 Operations Plan, Form 8 Source of Funds, Form 9 Position changes, Revision Justification and Document Management.**



FORM 8 OPERATIONS PLAN TAB



Step 1. Select the **Form 8 Operations Plan** tab.

Step 2. Click **New Item** to insert a line.

Step 3. Enter the **Appropriation Class, Function, Fund, Appropriation Unit,** and **Budget Object** that needs to be revised.

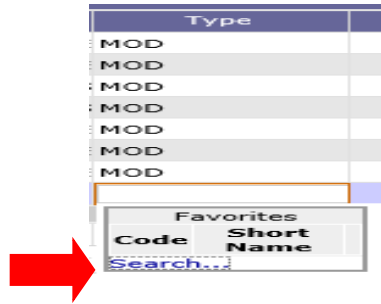
NOTE: Data for MULTIPLE Form 8's may be entered on this form. The reports generated using infoAdvantage will create individual Form 8's plus the Summary Form 8's based on the data entered in this tab.

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

[View as CSV](#)

Summary						
<input type="checkbox"/>	Line	Appropriation Class	Function	Fund	Appropriation Unit	Budget Object
<input type="checkbox"/>	1	918	0619	0100	0	0203
<input type="checkbox"/>	2	918	0619	0100	0	0202
<input type="checkbox"/>	3	918	0619	0100	0	FTE
<input type="checkbox"/>	4	918	0619	0100	0	POS
<input type="checkbox"/>	5	918	0619	0100	0	0104
<input type="checkbox"/>	6	918	0619	0100	0	0129
<input type="checkbox"/>	7	918	0619	0100	0	0201
<input checked="" type="checkbox"/>	8	<input style="border: 1px solid orange;" type="text"/>				

Step 4. In the **Type** field, **right click**, then, click **Search**. The **Type Search** screen displays.



Step 5. Click the **Search** again to display the options for the **Type** field.

	Code	Name	Short Name	Element Type
Select	NEW	New Line	New Line	COA
Select	MOD	Modify Line	Modify Line	COA

This field is used to either add a new line (NEW) in the Operations Plan or modify (MOD) a line that already exists in the original Operations Plan.

NOTE: If the object line(s) was not entered into PB for the original Operations Plan, **NEW** will need to be selected.

Step 6. Select the appropriate **Type** and it will populate in the form.

Summary									
<input type="checkbox"/>	Line	Appropriation Class	Function	Fund	Appropriation Unit	Budget Object	1	7	Type
<input type="checkbox"/>	1	918	0619	0100	0	0203			E MOD
<input type="checkbox"/>	2	918	0619	0100	0	0202			E MOD
<input type="checkbox"/>	3	918	0619	0100	0	FTE			S MOD
<input type="checkbox"/>	4	918	0619	0100	0	POS			S MOD
<input type="checkbox"/>	5	918	0619	0100	0	0104			E MOD
<input type="checkbox"/>	6	918	0619	0100	0	0129			E MOD
<input type="checkbox"/>	7	918	0619	0100	0	0201			E MOD

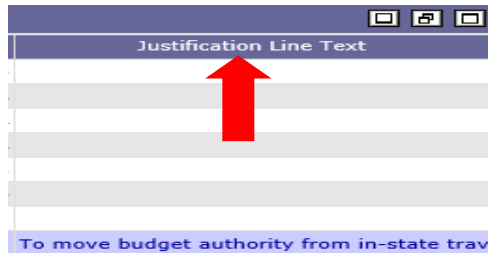
Step 7. Enter the amounts that should be revised for the chart of accounts elements selected by quarter in the **Q1 –Q4 Revision columns**.

Type	Q1 Revision	Q2 Revision	Q3 Revision	Q4 Revision	Revision Total
MOD	2,475	2,475	2,475	2,475	9,900
MOD	2,689	1,860	1,860	1,395	7,804
MOD	1	1	1	1	4
MOD	1	1	1	1	4
MOD	16,137	13,832	13,832	11,527	55,328
MOD	400				400
MOD	1,265	1,058	1,058	882	4,263

NOTE: If multiple lines are needed for the same chart of accounts, select the line already entered and click **Copy Item**.

Step 8. Enter an explanation for this revision in the **Justification Line Text** column. The information typed into this field will display in the **Objective** field on the top of Form 8.

****The justification should be entered only once for an Appropriation Class, Function, Fund and Appropriation Unit combination. If entered more than once, the justification will populate multiple times on the same Form 8.**

A screenshot of a software application window. The window has a title bar with standard minimize, maximize, and close buttons. Below the title bar is a header row with the text "Justification Line Text". Underneath the header are several rows of a table, each with a light gray background. A large red arrow points upwards to the first empty row below the header. At the bottom of the window, there is a blue bar with white text that reads "To move budget authority from in-state trav".

Step 9. Click **Save** and the **Action was Successful** message will display.

FORM 9 – POSITION CHANGES TAB

NOTE: If a manual (Excel) Form 9 was submitted with the Operations Plan, an updated form will need to be attached with each revision. (The system generated Form 9 populated by input on the Position Changes tab will not be used). A Form 9 is required with submission when changes are made to object code 0100.

If a revision requires changes to personnel cost (salaries), use the **Form 9 Position Changes tab** to ensure the Form 9 automatically generated during the revision process will agree to the total personnel costs in the Operations Plan at the agency level. However, you may revise object 0100 by keying directly on the Form 8 in the budgeting application.

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 infoAdvantage (see the section for Running Reports through infoAdvantage).

The SBFS projection proposes salaries (including longevity and merit raises, if eligible), Social Security and Medicare (FICA), retirement and insurance. The projection DOES NOT calculate overtime costs,

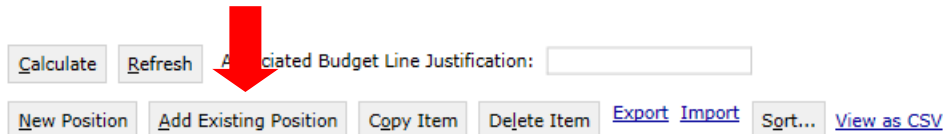
subsistence pay, termination costs or FICA on instate travel, so be sure to include these planned expenditures, if necessary, on the Form 8 Operations Plan tab.

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

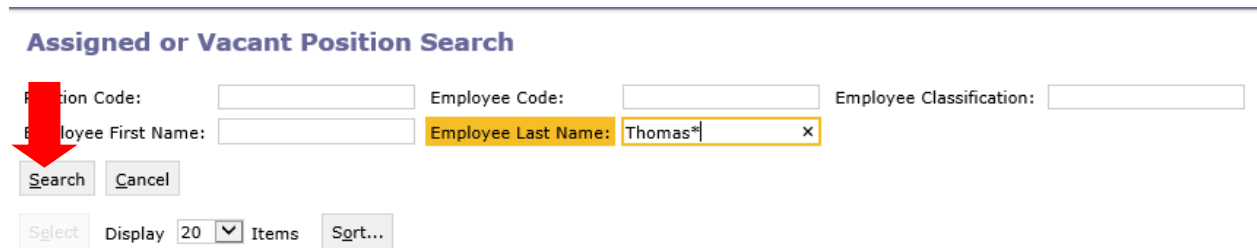


A. REMOVE AN EMPLOYEE

Step 2. 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

Click **Search**.

Step 4. Click on the box next to the employee, then click **Select** and the employee data will populate in the **Form 9 Position Changes** tab.

Step 5. Update the **Type** field.

Appropriation Unit	Type
0	0



The **Type** field is used to either add a new line in the Operations Plan (NEW) or modify (MOD) an existing line. If you are unsure whether a line exists in the Operations Plan, run the AFIN-BUD-004 Budget Management report or the AFIN-BUD-013 Operation Plan Status report using infoAdvantage.

Step 6. Right click in the **Type** field, then click **Search**.

Type Search

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

Display Items

	Code	Name	Short Name	Element Type
Select	NEW	New Line	New Line	COA
Select	MOD	Modify Line	Modify Line	COA

Step 7. Select the appropriate **Type**, New Line or Modify Line, to populate in the form.

Summary					
<input type="checkbox"/>	Appropriation Class	Function	Fund	Appropriation Unit	Type
<input checked="" type="checkbox"/>	640	0421	0101	0	MOD

Step 8. Next, enter a negative 1 (-1) in the **Count** field to remove the employee.

Classification	Step	Category	Funding Start Date	Funding End Date	FTE	Count	Salary Percentage
10613	08				1	-1	100

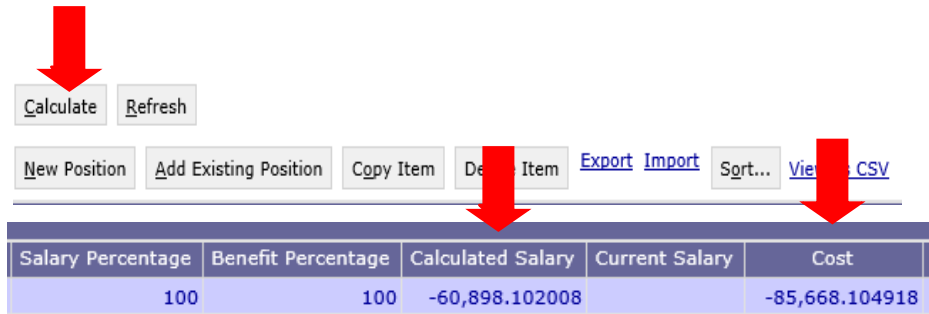
Step 9. Enter the necessary information for the **Funding Start Date** and **Funding End Date** that corresponds to the employee’s last date of employment or the date for which you are moving an employee to another chart of account element.

Funding Start Date	Funding End Date
10/01/2017	10/31/2017

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

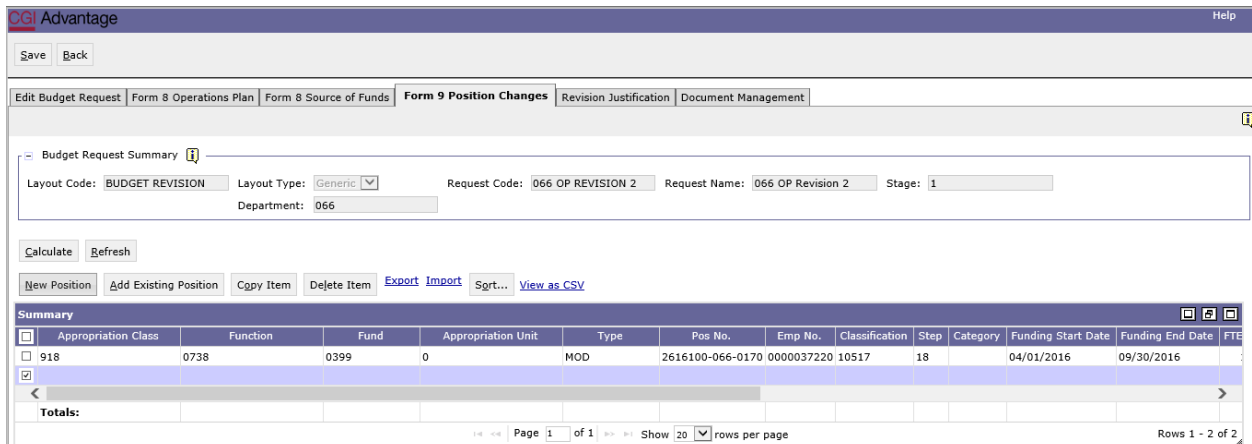
changes for the entire year. If the goal is to remove an employee for a partial year, specific dates must be entered.

Step 10. Once the required information has been entered, click **Calculate**. Note the calculated salary and total cost fields are updated to reflect the changes.



B. ADD AN EMPLOYEE OR NEW POSTION

Step 11. 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 **Form 9 Position Changes** tab.



Step 12. Enter the chart of account elements (Appropriation Class, Function, Fund, and Appropriation Unit, if applicable) for the proper grouping in which you wish to add the new or existing employee.

Step 13. In the **Type** field, select the appropriate **Type (NEW or MOD)**.

Step 14. In the **Classification** field, right click and then click **Search**.

Step 15. The **Classification Search** page will display. Click **Search** again.

	Code	Name
Select	10613	SENIOR ACCOUNTANT
Select	10613T	SENIOR ACCOUNTANT
Select	10613F02	ACCOUNTANT III - AOC
Select	10613S	SR ACCT (AGENCY 099)

Step 16. Using the wildcard (*), search for the classification by **Code** or **Name** of the new hire or employee you are adding. Example: 10613*

Step 17. Select the **Classification**, and the data will populate in the **Form 9 Position Changes** tab.

STAARS BUDGETTING 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 18. In the **Step** field, right click, then click **Search**.

Step 19. The **Step Search** screen will display, click **Search** again for the list to populate. Select the appropriate step.

	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

Step 20. Next, you will need to select the proper retirement category. In the **Category** field, right click then click **Search**

Step 21. The **Category Search** screen will display. Click **Search** and the categories will display.

CGI Advantage

Category Search

Code: Name:

Display Items

Item Page: [1](#) [2](#) [3](#)

	Code	Name
<input type="button" value="Select"/>	DEFAULT	Default Benefits
<input type="button" value="Select"/>	NO BENEFITS	No Benefits
<input type="button" value="Select"/>	SEIB 1	SEIB Full Time and 3/4 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 1	ERS Other Tier 1 SEIB Full Time and 3/4 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 2	ERS Other Tier 1 SEIB 1/2 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 3	ERS Other Tier 1 SEIB 1/4 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 4	ERS Other Tier 2 SEIB Full Time and 3/4 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 5	ERS Other Tier 2 SEIB 1/2 Time
<input type="button" value="Select"/>	ERS OTHER SEIB 6	ERS Other Tier 2 SEIB 1/4 Time
<input type="button" value="Select"/>	ERS LAW ENF SEIB 1	ERS Law Enforcement Tier 1 SEIB Full Time and 3/4 Time

Step 22. 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 remove an employee for a partial year, specific dates must be entered.

DEFAULT SETTING

Funding Start Date	Funding End Date
10/01/2017	09/30/2018

PARTIAL YEAR

Funding Start Date	Funding End Date
01/01/2018	09/30/2018

Step 23. In the **FTE** field, enter the desired FTE percentage:

FTE	Count	Salary Percentage	Benefit Percentage
1	1	100	100

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

Step 24. In the **Count** field, enter the number of employees that will be hired at this rate.

FTE	Count	Salary Percentage	Benefit Percentage
1	1	100	100

Step 25. In the **PT or FT** field, right click then click **Search** to select the code for full time or part-time employee.

Step	PT or FT	Category	Funding Start Date

Step 26. In the **Salary Percentage** and the **Benefit Percentage** fields you will need to key the equivalent percent for the FTE keyed (Step 22). If nothing is entered, both percentages will automatically calculate at 100%.

Salary Percentage	Benefit Percentage	Calculated Salary

Step 27. Once all fields have been added, click **Calculate**.

Step 28. Click **Save** and determine if the **Action was Successful**.

NOTES:

The same process would need to be followed to add an employee that is being moved between chart of account elements. Since the employee is actually assigned to certain chart of account elements, you may remove the specific employee, but a specific employee may not be added to a different chart of accounts grouping and must be added 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 chart of account element is the same amount when adding the employee back using different chart of accounts elements.

To make adjustments for a promotion, REMOVE the specific employee (i.e. remember to use a negative number in the "count" field to subtract) for the dates desired, then create another line to ADD the employee back using the new classification, step, category and appropriate dates, along with the chart of account element combination the employee needs to be budgeted in.

Form 9 is required for all revisions that change personnel cost (object 0100).

DO NOT USE THE ASSOCIATED BUDGET LINE JUSTIFICATION FIELD IN THE FORM 9 POSITION CHANGES TAB. CONTINUE TO PROVIDE JUSTIFICATION FOR REVISIONS USING THE REVISIONS JUSTIFICATION TAB.

The screenshot shows the CGI Advantage web interface. At the top, there are buttons for 'Save' and 'Back To Inbox'. Below that is a navigation bar with tabs: 'Edit Budget Request', 'Form 8 Operations Plan', 'Form 8 Source of Funds', 'Form 9 Position Changes', and 'Revisi'. The 'Form 9 Position Changes' tab is active. Underneath, there is a 'Budget Request Summary' section with fields for 'Layout Code: BUDGET REVISION', 'Layout Type: Generic', and 'Department: 069'. A green callout bubble with white text says 'CAUTION: DO NOT USE THIS FIELD FOR JUSTIFICATION' and points to the 'Associated Budget Line Justification' field. Below this are buttons for 'Calculate', 'Refresh', 'New Position', 'Add Existing Position', 'Copy Item', 'Delete Item', 'Export', 'Import', 'Sort...', and 'View as CSV'. At the bottom, there is a 'Summary' table with columns for 'Appropriation Class', 'Function', 'Fund', and 'Appropriation Unit'.

FORM 8 SOURCE OF FUNDS TAB

If all data has been entered on the Form 8 Operations Plan tab and the Form 9 Position Changes tab, you are now ready to complete the Source of Funds.

Step 1. Select the **Form 8 Source of Funds** tab.

The screenshot shows the top navigation bar of the CGI Advantage application. The tabs are: Edit Budget Request, Form 8 Operations Plan, **Form 8 Source of Funds**, Form 9 Position Changes, Revision Justification, and Document Management. A red arrow points to the 'Form 8 Source of Funds' tab.

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

The screenshot shows the 'New Item' button highlighted with a red arrow. Other buttons include Refresh, Zero Out, Display Sub Total (checked), Select Model (dropdown), Copy Item, Delete Item, Export, Audit Trail, Sort..., and View as CSV. Below the buttons is the 'Summary' table header with columns: Line, Appropriation Class, Function, and Fund.

Step 3. Enter the **Appropriation Class** and **Function** that corresponds to what was entered on the Form 8 Operations Plan tab. These items can be searched by right clicking in the box and clicking Search.

Step 4. In the **Fund** column, right click. Click **Search**.

Step 5. After the **Fund Search** screen appears, click **Search**.

All Sources of Funds available for your agency will display.

The screenshot shows the 'Fund Search' screen. It includes search criteria for Code (1692*), Name, Short Name, and Element Type. There is a 'Parent Fund' field with a search icon. A section for 'Financial Rollups Information' has a 'Category' field with a search icon. Below the search fields are 'Search' and 'Cancel' buttons. At the bottom, there is a 'Display 20 Items' dropdown and a 'Sort...' button. The results table is as follows:

	Code	Name	Short Name	Element
Select	1692-202	Advancement & Technology Fund - Reversion Reappropriated	ETF Adv & Techn	COA
Select	1692-201	Education Trust Fund Advancement & Technology Fund	ETF Adv & Techn	COA

Step 6. Select the desired **Source of Funds** and it will populate in the tab.

Display Sub Total:

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

Summary					
<input type="checkbox"/>	Line	Appropriation Class	Function	Fund	
<input type="checkbox"/>	1 131		0113	1692-201	0

Step 7. Enter the **Appropriation Unit**, if applicable.

NOTE: The tab requires an appropriation unit to be entered before the form can be saved. If the chart of accounts does not have an appropriation unit, enter the default item which is 0.

Next, enter totals by quarter for that **Source of Funds**.

NOTE: You **MUST** enter a **Source of Funds** **EVEN IF** the amounts per quarter are **-0-**.

Step 8. Once all Sources of Funds have been entered on the tab, click **Save** to exit. **Action was Successful** will appear.

Follow these steps to enter Sources of Funds for all chart of account combinations entered on the Form 8 Operations Plan tab.

REVISION JUSTIFICATION TAB

Step 1. Select the **Revision Justification** tab.



CGI Advantage Help

Save Back

Edit Budget Request | Form 8 Operations Plan | Form 8 Source of Funds | Form 9 Position Changes | **Revision Justification** | Document Management

Display All Items [Sort...](#)

<input type="checkbox"/>	Section Title	Section Content
<input type="checkbox"/>	Revision Justification	

Step 2. Enter the reason for the revision in the **Section Content** box. This tab populates the justification on the 101 Form (if necessary).

Section Content	
	To accommodate the retirement of one employee and a new hire for the Workforce Development grant.

Step 3. Click **Save**.

Now, you are ready to generate the infoAdvantage Report that will create Forms 8, 9 and 101 (if necessary).

Log into infoAdvantage and generate the budget revision packet. For steps on generating the packet, reference the STAARs infoAdvantage Manual.)

DOCUMENT MANAGEMENT TAB

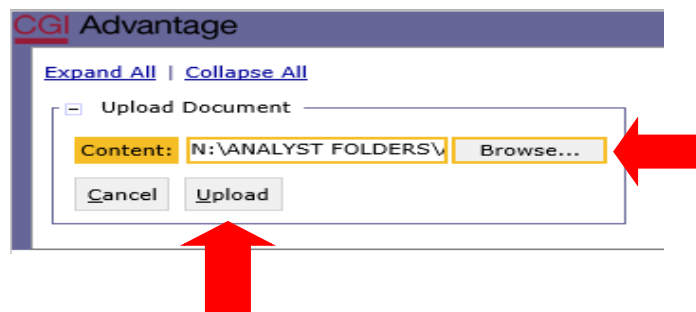
All reports created in infoAdvantage will need to be attached in the appropriate form using the following steps.

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

Step 2. Click **Add Document**.

Step 3. Click **Browse** to locate your saved files.



Select the file.



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

[Edit Budget Request](#) | [Form 8 Operations Plan](#) | [Form 8 Source of Funds](#) | [Form 9 Position Changes](#) | [Revision Justification](#) | **Document Management**

[Add Document](#) | [Delete](#) | [Save](#) | [Check Out](#) | [Check In](#) | [Search From Repository](#) | Display Items | [Sgrt...](#)

File Name	Content Type	Last Modified Timestamp
 FY18 069 Revision 4.pdf	application/pdf	05/30/2017 16:44:22
 FY18 069 Revision 4 Grant Award Letter.pdf	application/pdf	

NOTE: Please be sure to include ALL required documentation for the Budget Revision in the Document Management tab using PDF format. Other documentation could be grant award letters, program change letters, etc.

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

FY 20 069 Revision 4 Program Change Letter

FY 20 069 Revision 4 Grant Award Letter

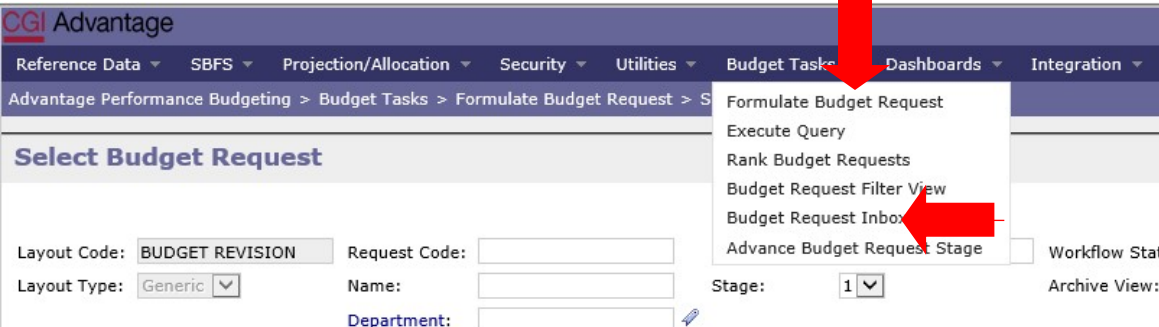
FY 20 069 Revision 4 Other Supporting Documents

Step 5. When all required forms have been attached in the **Document Management** tab, click **Save**.

Step 6. Click **Back to Inbox** to return to the Budget Request Inbox.

SUBMISSION

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



The screenshot shows the CGI Advantage interface. The top navigation bar includes 'Reference Data', 'SBFS', 'Projection/Allocation', 'Security', 'Utilities', 'Budget Tasks', 'Dashboards', and 'Integration'. The 'Budget Tasks' dropdown menu is open, showing options: 'Formulate Budget Request', 'Execute Query', 'Rank Budget Requests', 'Budget Request Filter View', 'Budget Request Inbox', and 'Advance Budget Request Stage'. A red arrow points to the 'Budget Request Inbox' option. Below the dropdown, the page title is 'Select Budget Request'. There are input fields for 'Layout Code' (set to 'BUDGET REVISION'), 'Request Code', 'Layout Type' (set to 'Generic'), 'Name', 'Department', 'Stage' (set to '1'), 'Workflow Stat', and 'Archive View'.

Step 1. Select **Budget Request Inbox**.

Step 2. Select the Budget Revision that is ready to be submitted.

Budget Request Inbox

Layout Code: Stage:

Request Code: Included in Ranking: User/User Group:

Workflow Status: ID: Full

Display Items

<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	069 FY18 OP REV 02	069 FY18 OP REV 02	BUDGET REVISION	1	Work In Progress

Step 3. Click **Submit**. The following screen displays, allowing you to add comments for the 1st Approver.

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

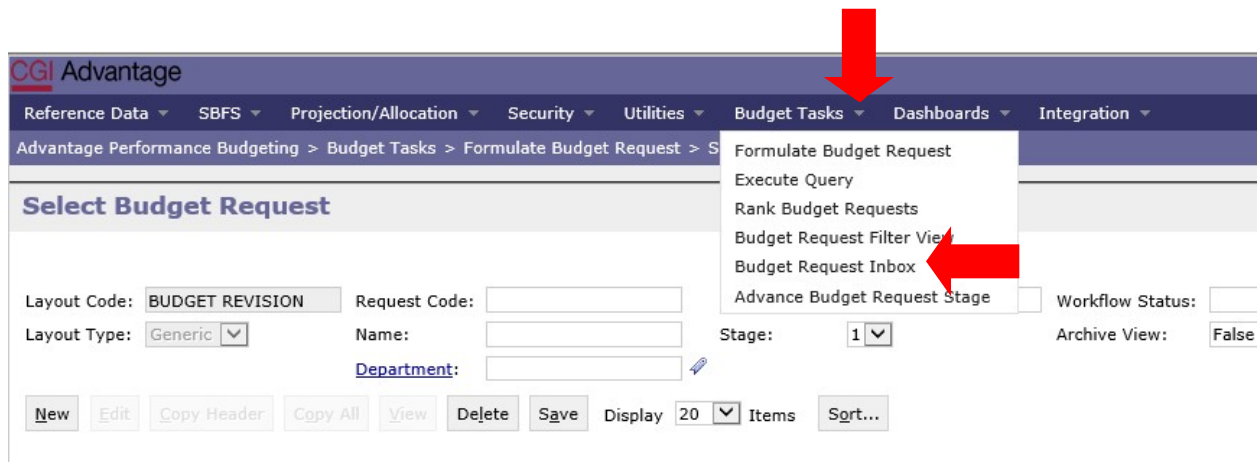
Step 4. Click **Confirm**. You will be taken back to the **Budget Request Inbox** and receive a message that the budget revision was **Successfully Submitted**. Each document submitted will be identified by the name given during preparation.

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**.



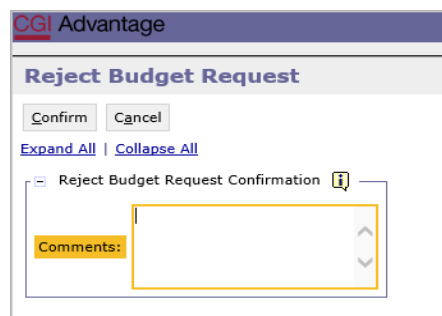
Step 2. The 1st approver will need to **select the revision**.



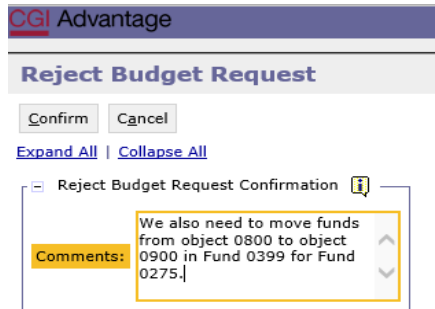
<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	069 FY18 OP REV 02	069 FY18 OP REV 02	BUDGET REVISION	1	Work In Progress

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 revision 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.

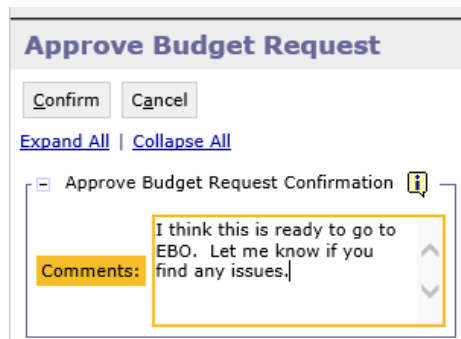
We also need to move funds from object 0800 to object 0900 in Fund 0399 for Fund 0275. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20P%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

NOTE: The submitter should make the required changes in STAARS Budgeting, rerun the reports in infoAdvantage and attach the correct packet using the **Document Management** tab. This process should take place anytime corrections are to be made for a Budget Revision. Then, the submitter can resubmit the Packet(s) to the 1st approver.

Step 7. After the 1st approver receives and reviews the corrected Budget Revision, the 1st approver can now submit to the 2nd approver.

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

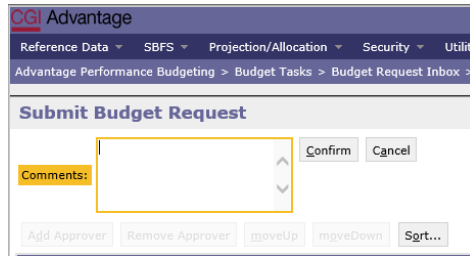
Step 9. Click **Confirm** to approve the budget revision.



NOTE: The revision will stay in 1st approver's inbox until they **SUBMIT** the revision to the 2nd approver.

Step 10. To submit the approved revision to the 2nd approver, select the revision again, then click **Submit**.

Step 11. Click **Confirm** to submit the budget revision.



Step 12. You will return to the **Budget Request Inbox** and a message displays that the Budget Revision was **Successfully Submitted**. The 2nd approver receives an email indicating that the Packet has been submitted.

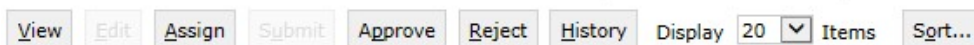
Step 13. The 2nd approver will receive an email with a link to STAAR Budgeting to login and approve.

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

ADDITIONAL OPTION - REJECTED

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

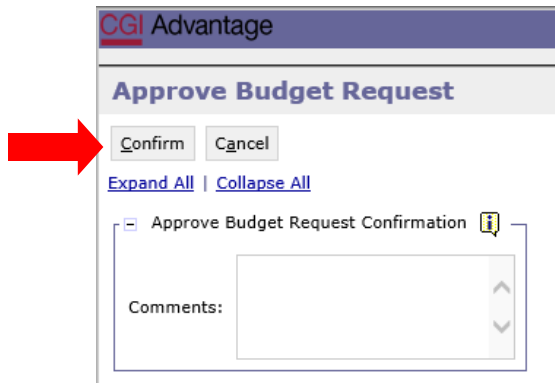
Step 14. Select the form(s), then click **Approve**.



<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	379 OP REVISION 1	379 OP REVISION 1	BUDGET REVISION	2	Submitted

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

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



CGI Advantage

Approve Budget Request

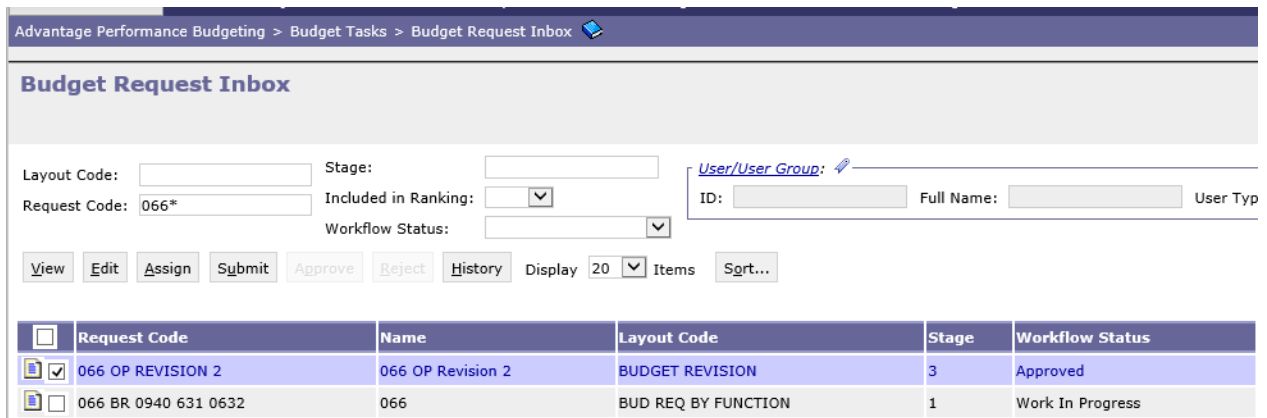
[Expand All](#) | [Collapse All](#)

Approve Budget Request Confirmation ⓘ

Comments:

NOTE: After approval, the form(s) remains in the 2nd approver's **Budget Request Inbox** until it is also submitted to the Executive Budget Office.

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



Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox

Budget Request Inbox

Layout Code: Stage: [User/User Group](#) ⓘ

Request Code: 066* Included in Ranking: ID: Full Name: User Typ

Workflow Status:

Display 20 Items

<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	066 OP REVISION 2	066 OP Revision 2	BUDGET REVISION	3	Approved
<input type="checkbox"/>	066 BR 0940 631 0632	066	BUD REQ BY FUNCTION	1	Work In Progress

The **Submit Budget Request** screen displays.

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

Step 18. You will be returned to the **Budget Request Inbox** and should have a message that the revision was **Successfully Submitted**.

THE PROCESS TO SUBMIT IS COMPLETE!

NOTE: If rejected by the Executive Budget Office, the forms(s) will be returned to only 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).