STAARS INFOADVANTAGE REPORTING

EBO FY22

State Agencies

Welcome to STAARS infoAdvantage! STAARS infoAdvantage is the tool for creating reports now known as packets for Budget Request, Operation Plans, and Budget Revisions that will be submitted to the Executive Budget Office through electronic workflow.

InfoAdvantage will be used by State Agencies for the following:

Salaries and Benefits Forecasting System (SBFS) Projections

- **Data Dump Report**

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)

Operations Plan Forms

- **Form 8** – Operations Plan
- **Form 9** – Employee Staffing Plan

Budget Revisions

- **Form 8** – Operations Plan
- **Form 9** – Employee Staffing Plan
- **Form 101** – Used for increasing appropriations, quarter allotment revisions, supplemental appropriations, additional department or federal receipts, transfers or other revisions. This form is automatically generated in STAARS Budgeting. However, minor additions will need to be added on the Form 101 after exporting to Microsoft Excel. **Form 101 will also need to be included with Form 8 and 9 (as part of the Budget Revision Packet) on the Document Management tab.**

ACCESSING STAARS INFOADVANTAGE

STAARS infoAdvantage has a separate login URL and screen than STAARS Budgeting. Therefore, access to two different areas of STAARS will be required. Budget Request, Operation Plans, and Budget Revision FORMS are to be completed in the STAARS Budgeting application. Once the forms are complete, access to STAARS infoAdvantage will be required to run reports or packets.

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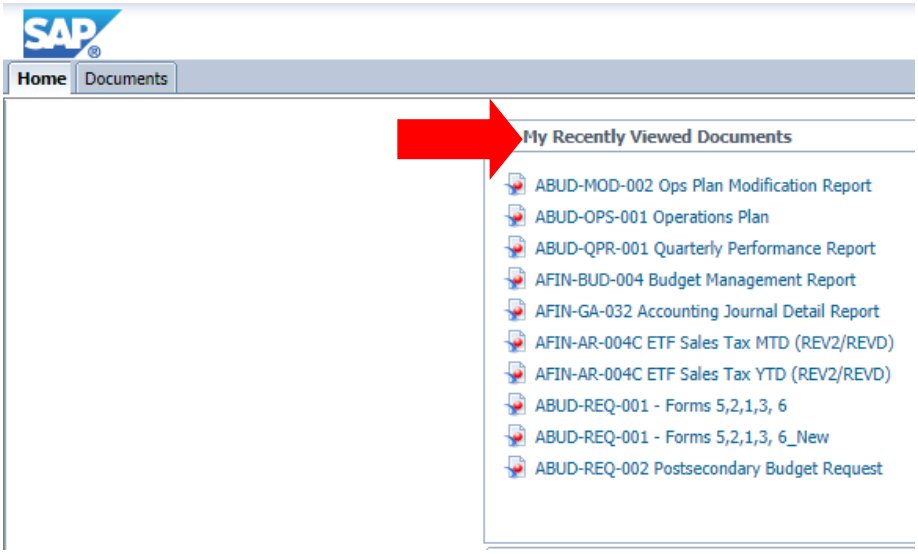
LOGIN TO STAARS infoADVANTAGE

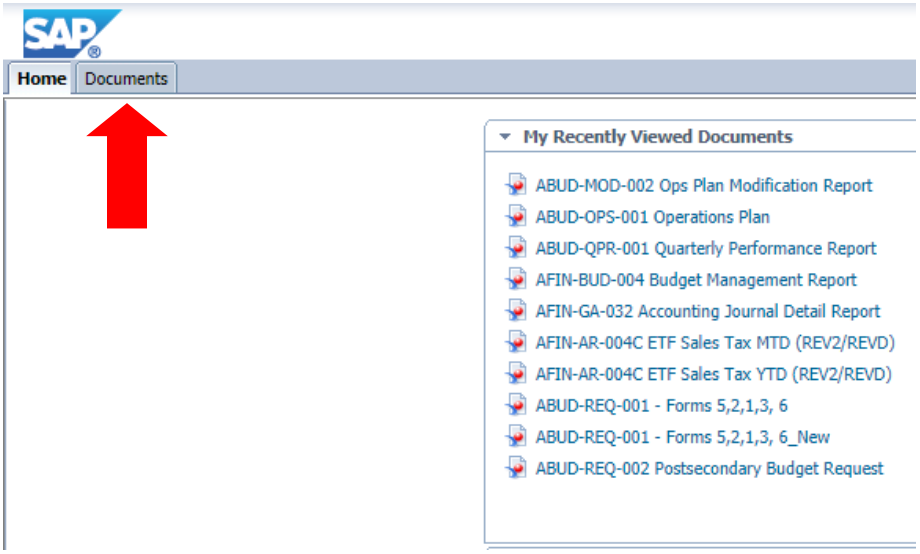
Please contact your Agency Implementation Lead (AIL) for login credentials or STAARS Support at (334-353-9000) or STAARS.Support@Finance.Alabama.gov.

Step 1. Log into CGI infoAdvantage using https://staarsinfo.alabama.gov/BOE/BI. Please contact your Agency Implementation Lead (AIL) for login credentials

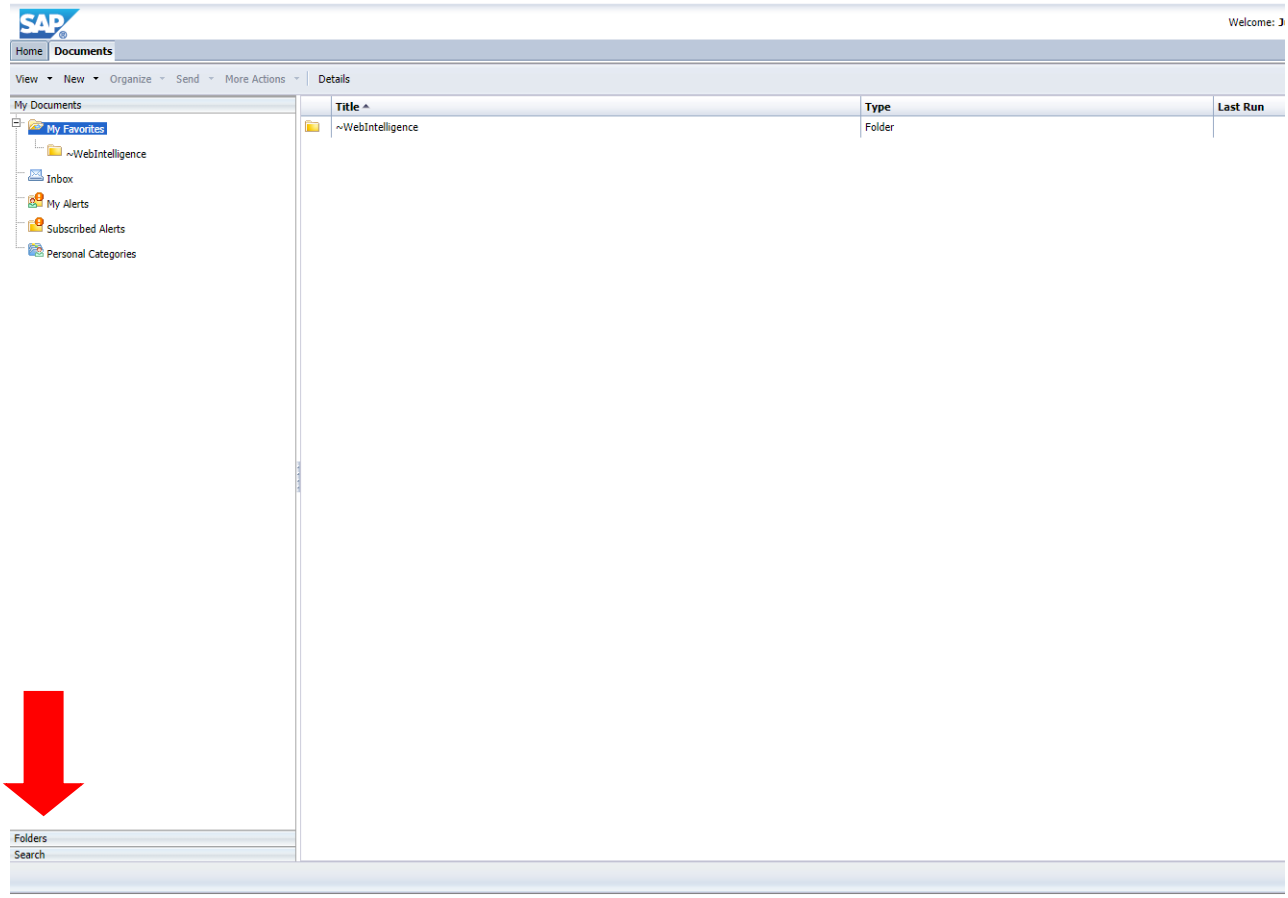
Step 2. The CGI infoAdvantage Welcome Screen will appear and four message boxes will populate. The first square will include a list of My Recently Viewed Documents. (The report you need to run may be there if you have used the report recently).



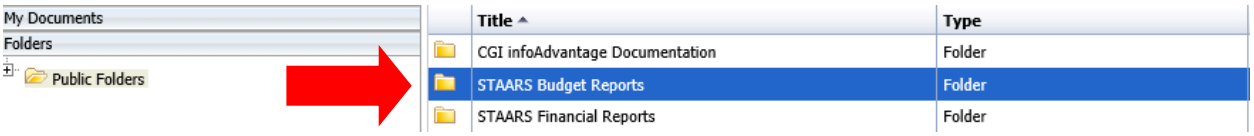
Step 3. Click **Documents** on the top tool bar.



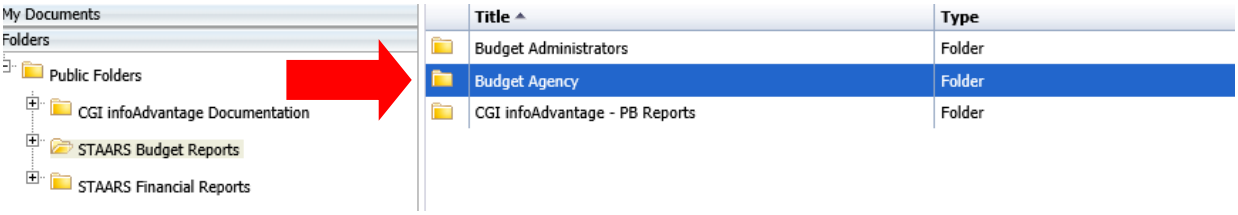
Step 4. Select the **Folders** tab at the bottom of the screen.



Step 5. Select the **STAARS Budget Reports** folder.



Step 6. Select the **Budget Agency** folder.

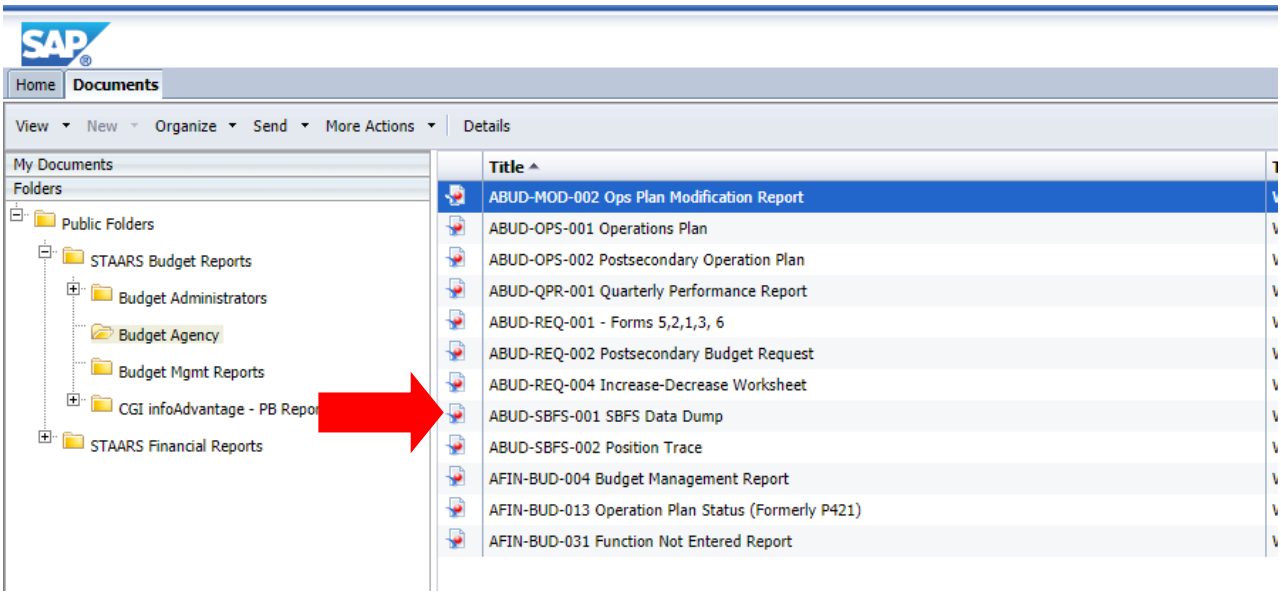


Salary and Benefits Forecasting System (SBFS) Data Dump Report

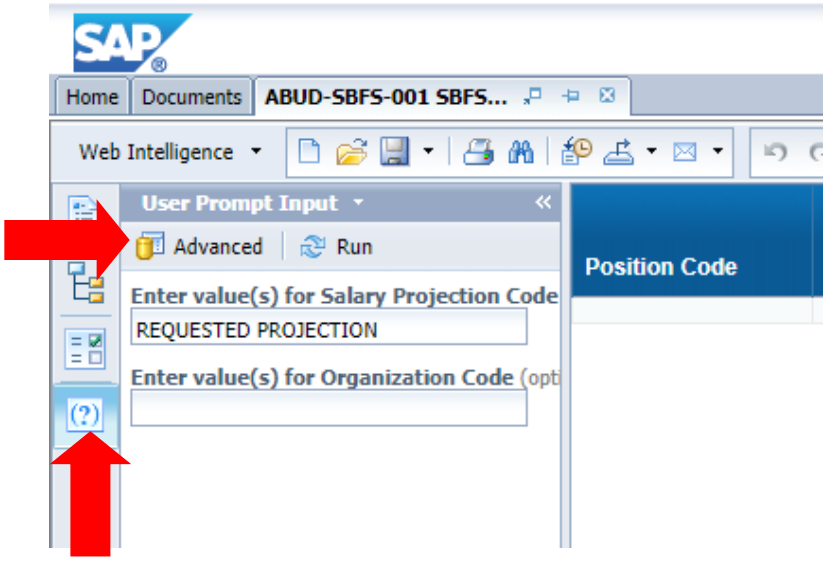
The SBFS Report will need to be generated through STAARS infoAdvantage before completing the **Position Changes** tab in STAARS Budgeting.

Follow Steps 1-6 in the Login Section above.

Step 7. Select the **SBFS Data Dump**.

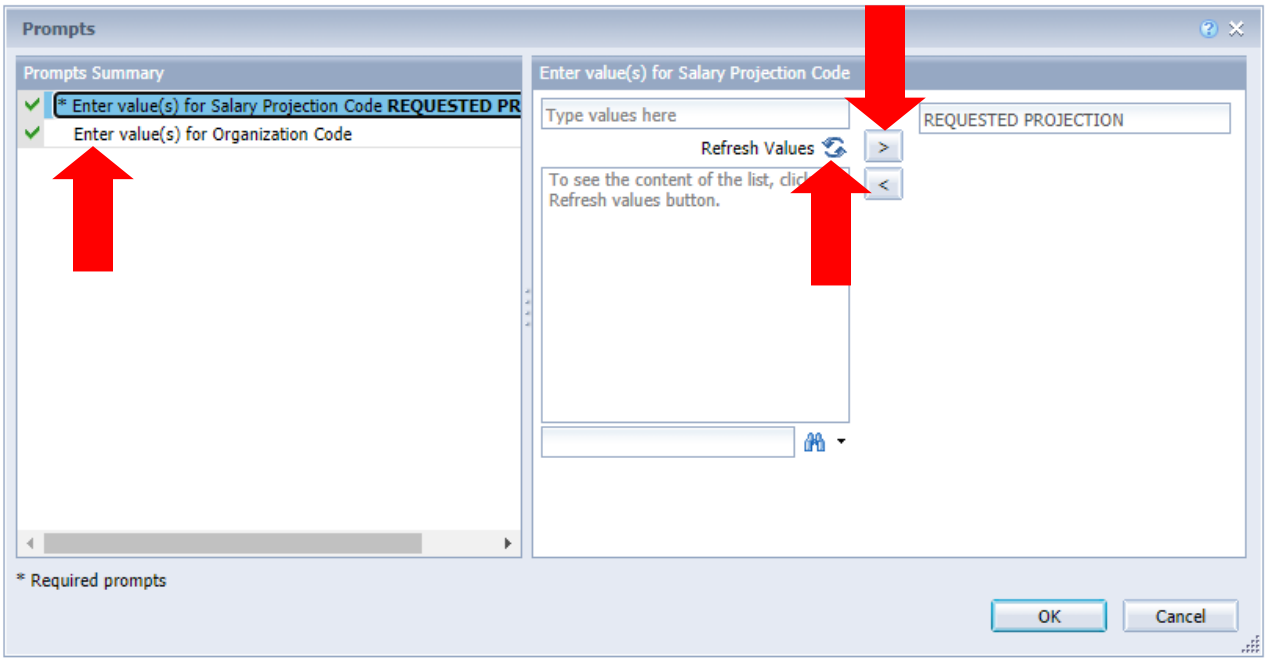


Step 8. Click the **Question Mark** on the far left to open the **User Prompt Input** box.

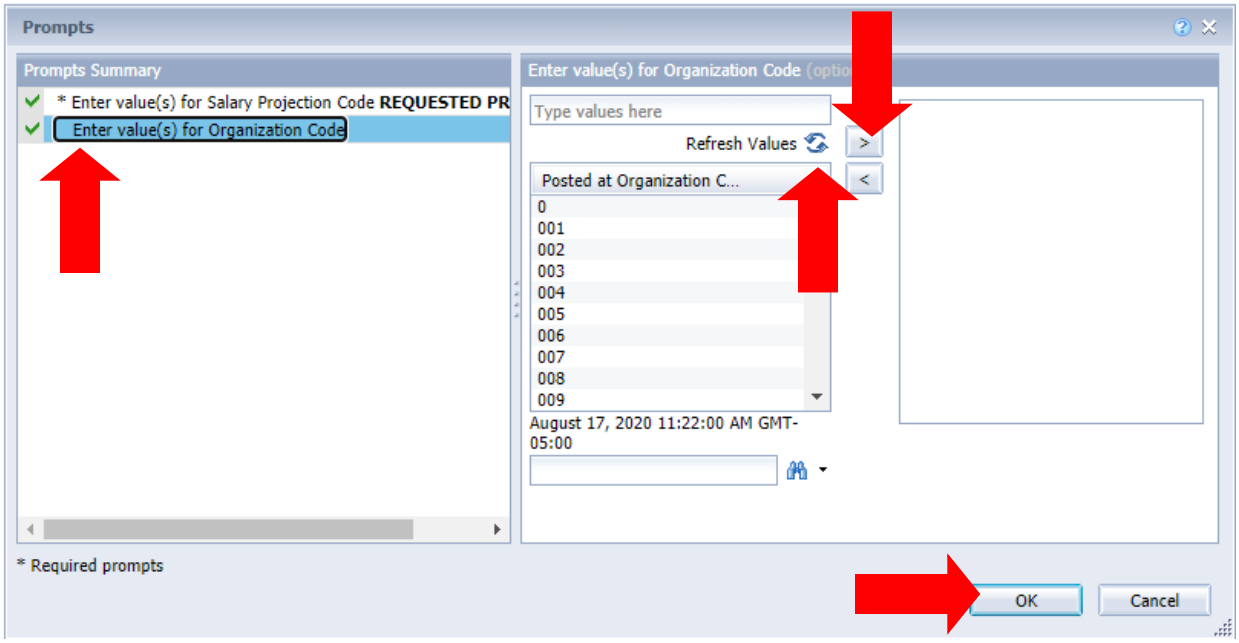


Step 9. Click **Advanced.**

Step 10. The **Prompts** screen will appear. Click the **Refresh Values** symbol for the first prompt highlighted, **Enter value(s) for Salary Projection**. Use the greater than arrows to move the selected **Requested Projection** to the box on the right.



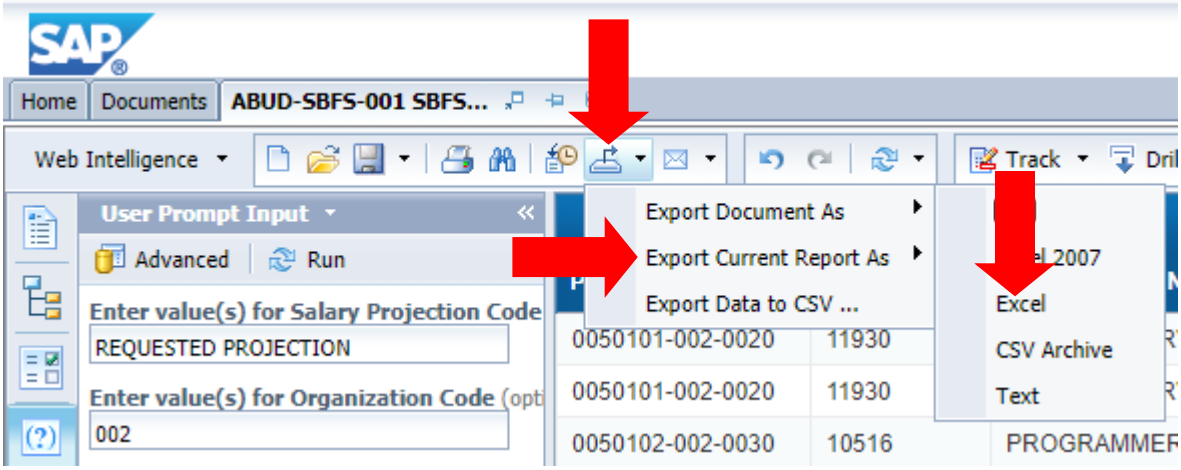
Step 11. On the **Prompts** screen click the second prompt, **Enter value(s) for Organization Code.** Click the **Refresh Values** symbol and then use the greater than arrows to move the selected department to the box to the far right.



Step 12. Click **Ok** to run the report.

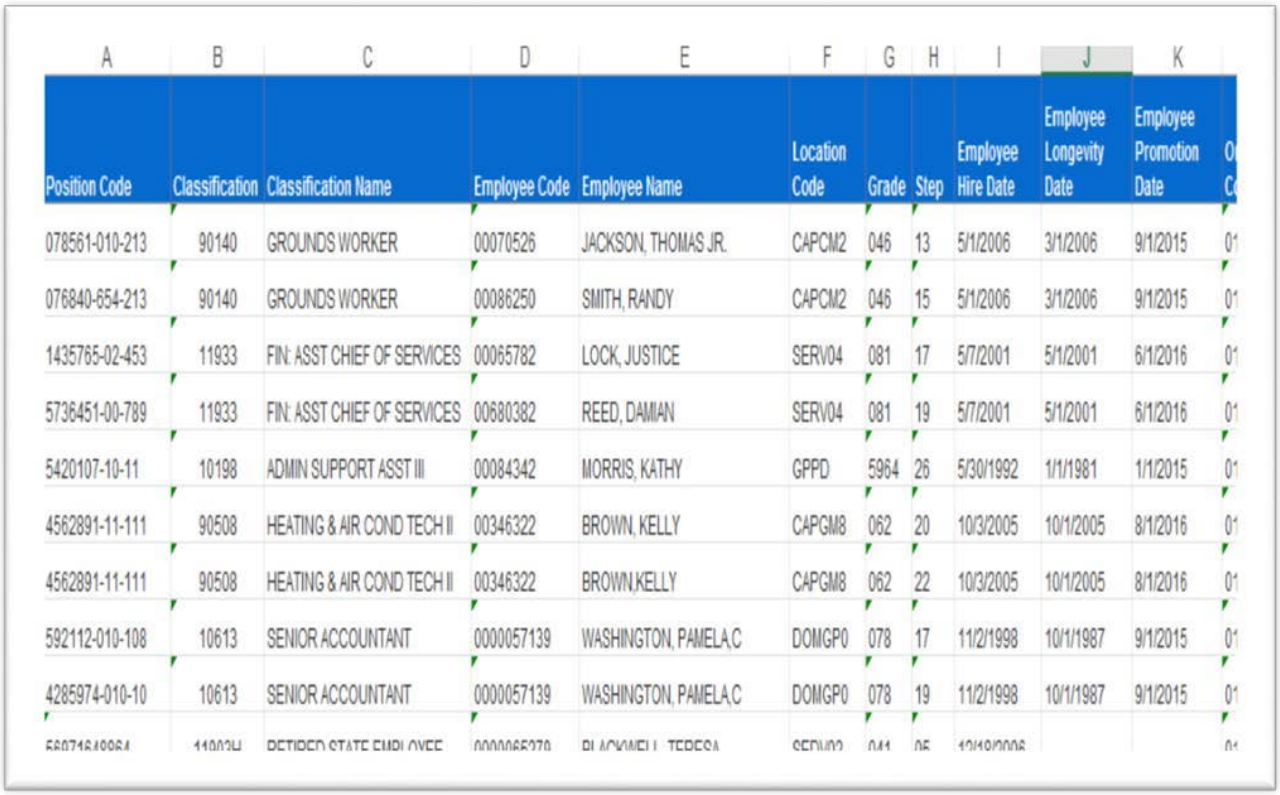
Exporting to Excel

Step 13. To download the report, click **Export** key at the top of the screen, select **Export Current Report As,** then select **Excel**.



Step 14. Sort, and review the data provided specifically for your department as needed.

EXAMPLE: SBFS DATA DUMP REPORT



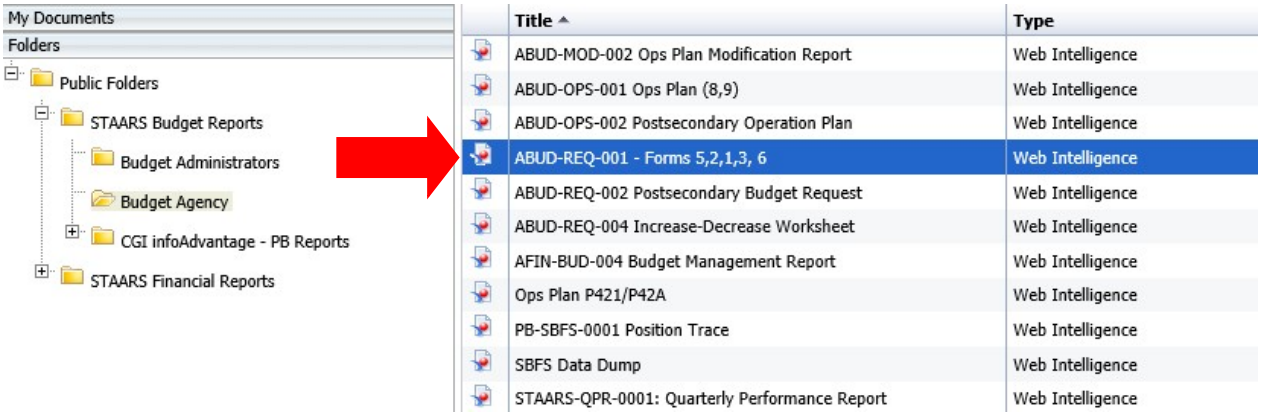
Position Code	Classification	Classification Name	Employee Code	Employee Name	Location Code	Grade	Step	Employee Hire Date	Employee Longevity Date	Employee Promotion Date
078561-010-213	90140	GROUNDS WORKER	00070526	JACKSON, THOMAS JR.	CAPCM2	046	13	5/1/2006	3/1/2006	9/1/2015
076840-654-213	90140	GROUNDS WORKER	00086250	SMITH, RANDY	CAPCM2	046	15	5/1/2006	3/1/2006	9/1/2015
1435765-02-453	11933	FIN: ASST CHIEF OF SERVICES	00065782	LOCK, JUSTICE	SERV04	081	17	5/7/2001	5/1/2001	6/1/2016
5736451-00-789	11933	FIN: ASST CHIEF OF SERVICES	00680382	REED, DAMIAN	SERV04	081	19	5/7/2001	5/1/2001	6/1/2016
5420107-10-11	10198	ADMIN SUPPORT ASST III	00084342	MORRIS, KATHY	GPPD	5964	26	5/30/1992	1/1/1981	1/1/2015
4562891-11-111	90508	HEATING & AIR COND TECH II	00346322	BROWN, KELLY	CAPGM8	062	20	10/3/2005	10/1/2005	8/1/2016
4562891-11-111	90508	HEATING & AIR COND TECH II	00346322	BROWN,KELLY	CAPGM8	062	22	10/3/2005	10/1/2005	8/1/2016
592112-010-108	10613	SENIOR ACCOUNTANT	0000057139	WASHINGTON, PAMELA,C	DOMGP0	078	17	11/2/1998	10/1/1987	9/1/2015
4285974-010-10	10613	SENIOR ACCOUNTANT	0000057139	WASHINGTON, PAMELA,C	DOMGP0	078	19	11/2/1998	10/1/1987	9/1/2015

BUDGET REQUEST PACKET

****All reports created for the Budget Request Packet will need to be attached in the Form 1 and 3 Document Management tab.****

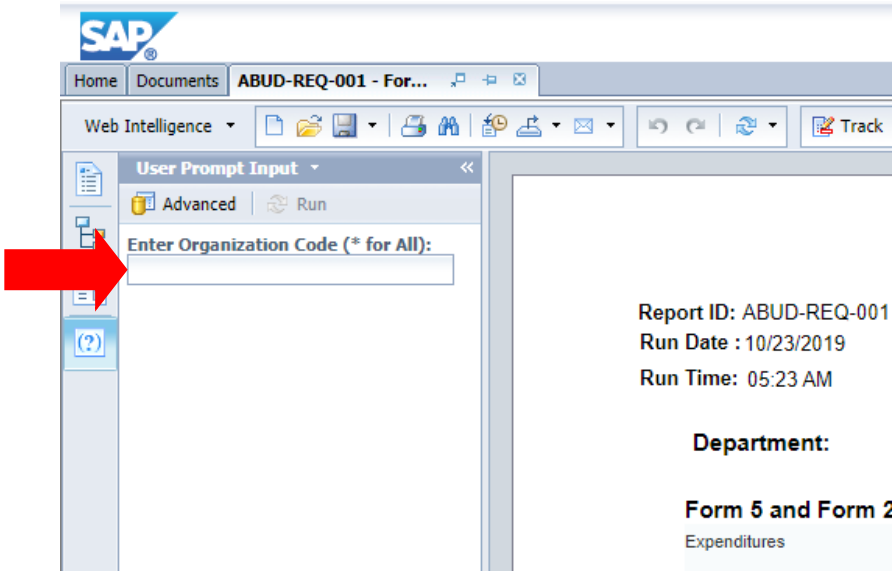
Follow Steps 1-6 in the Login Section above.

Step 7. To generate the **Budget Request Packet**, Select **ABUD-REQ-001 – Forms 5, 2, 1, 3, and 6**.



If the department data is not prepopulated on the page, use the **User Prompt Input** section on the right to run a Budget Request Packet. Remember that when changes are made after review by an approver(s), the Budget Request Packet will need to be regenerated. The report that displays may not reflect the changes. Run the report again for accuracy before attaching the Budget Request Packet to the Document Management tab.

Step 8. Enter the 3-digit department code in the box for **Enter Organization Code** under the **User Prompt Input** section.



Step 9. Click **Run**.

Step 10. Review the **Error Check Report** to make sure all forms are in balance. Forms that are in balance and agree throughout the Budget Request Packet will be indicated by **OK**. Forms that are NOT in balance will be indicated by **Mismatched**. ****If the Error Check Report has any Mismatched notations under the Actual, Budgeted or Requested columns return to STAARS Budgeting for corrections.****

EXAMPLES

Error Check Report:

Report ID: ABUD-REQ-001
Run Date : 09/22/2015
Run Time: 04:24 PM

State of Alabama
Error Page

Department: 059 - Environmental Management

	Actual	Budgeted	Requested
Form 5 and Form 2	**2015**	**2016**	**2017**
Expenditures	201,479,891	151,199,913	101,703,126
Source of Funds	390,041,416	213,644,897	146,364,626
Form 5 Expenditures match Source of Funds	Mismatch	Mismatch	Mismatch
Form 3	**1200**	**1300**	**1400**
Capital Outlay	0	383,579	1,608,580
Capital Expenditure (Form 5)	0	383,579	1,608,580
Form 3 Capital Outlay matches Form 5	Ok	Ok	Ok

Form 1:

:eport ID: ABUD-REQ-001
BO Form No.1
:un Date: 9/22/15
:un Time: 4:24:35 PM

State of Alabama
Agency Budget Request
Estimated Condition of Funds

)epartment 059 - Environmental Management

Recap of All Funds	Actual 2015	Budgeted 2016	Requested 2017	Increase (Decrease) From Prior Year Amount	Percent
:001 Unencumbered Balance Brought Forward	83,570,318	220,130,242	750,488,637		
:002 Investments Balance	331,972,192	372,498,876	0		
:eceipts of Federal Funds For					
)939-101 - Federal Grants - Public Water SRF	24,951,616	4,729,632	12,000,000	7,270,368	
)453-101 - Federal Grants - Clean Water SRF	28,830,640	17,826,168	25,943,484	8,117,316	
)453-102 - Transfers to CW SRF Master Account	89,609,968	51,886,968	0	(51,886,968)	
)347-101 - Federal Grants	37,456,912	41,368,708	21,733,154	(19,635,554)	
:eceipts of State Funds For					
210-201 - Alabama Recycling Fund	3,424,696	5,850,000	2,193,326	(3,656,674)	
209-201 - Solid Waste Fund	3,255,814	5,750,000	3,325,000	(2,425,000)	

Form 2:

:eport ID: ABUD-REQ-001
BO Form No.2
:un Date: 9/22/15
:un Time: 4:24:35 PM

State of Alabama
Agency Budget Request
Summary Budget Request

)epartment 059 - Environmental Management

Appropriation Class and Function	Actual Expenditures 2015	Budgeted Expenditures 2016	Requested Expenditures 2017	Increase (Decrease) From Prior Year Amount	Percent
418 - Environmental Management					
0223 - Administration	15,161,760	16,081,796	6,389,420	(9,692,376)	-60.27%
0224 - Water Quality Control	11,983,534	15,024,710	4,549,864	(10,474,846)	-69.72%
0225 - Air Pollution Control	7,580,636	7,812,305	794,478	(7,017,827)	-89.83%
0226 - Solid and Hazardous Waste Manage	13,343,112	15,613,244	3,999,636	(11,613,608)	-74.38%
0227 - Field Operations	13,174,415	13,203,216	2,645,086	(10,558,130)	-79.97%
Total: 418 - Environmental Management	**61,243,457**	**67,735,271**	**18,378,484**	**(49,356,787)**	**-72.87%**

Form 3:

eport ID: ABUD-REQ-001
BO Form No.3
un Date: 9/22/15
un Time: 4:24:35 PM

State of Alabama
Agency Budget Request
Capital Expenditures

epartment 059 - Environmental Management

Identification of Requested Items	Capital Outlay	Transportation Equipment Purchases	Other Equipment Purchases	Appropriation Class	Source of Financing
300 - Capital: Transportation Equipment	**0**	**383,579**	**0**	**418**	**Environmental**
Automobiles	*0*	*383,579*		They said NO Expenditures for Capital Pur believe this flew...	
400 - Capital: Other Equipment Purchases	**0**	**0**	**1,608,580**	**418**	**Environmental**
Computer Equipment and Accessories	*0*		*1,608,580*	Still can't believe this wasn't looked at...	
Grand Totals:	**0**	**383,579**	**1,608,580**		

Form 5:

port ID: ABUD-REQ-001
O Form No.5
n Date: 9/22/15
n Time: 4:24:35 PM

State of Alabama
Agency Budget Request

Department Summary

epartment: 059 - Environmental Management

Object Category	Actual Expenditures 2015	Budgeted Expenditures 2016	Requested Total 2017	Increase (Decrease) From Prior Year Amount	Percent
)T FTE - Total Full Time Equivalent	0.00	0.00	1	0.00	
00 - Personnel Costs	31,265,049	32,182,324	118,739	(32,063,585)	-99.63%
00 - Employee Benefits	11,742,343	12,314,274	26,372	(12,287,902)	-99.79%
00 - Travel-In State	351,300	376,354	371,354	(5,000)	-1.33%
00 - Travel-Out of State	121,685	133,153	133,152	(1)	0.00%
00 - Repairs and Maintenance	555,119	354,955	354,955	0	0.00%
00 - Rentals and Leases	1,652,331	1,600,000	1,600,001	1	0.00%
00 - Utilities and Communication	925,057	961,573	961,573	0	0.00%
00 - Professional Fees and Services	8,127,332	12,283,343	13,781,576	1,498,233	12.20%
00 - Supplies, Materials, and Operating Expenses	2,687,887	3,097,510	1,744,024	(1,353,486)	-43.70%
00 - Transportation Equipment Operations	466,015	462,880	462,833	(47)	-0.01%
00 - Other Equipment Purchases	1,158,381	1,608,580	1,608,580	0	0.00%
tal Expenditures	**59,052,500**	**65,374,946**	**21,163,159**	**-44,211,787**	**-67.63%**
nd No. Source of Funds					
47-101 - Federal Grants	37,248,048	41,368,708	21,733,154	(19,635,554)	-47.46%
47-202 - Alabama Underground Storage Tank Fund	3,664,746	4,720,000	2,360,000	(2,360,000)	-50.00%

Form 6:

eport ID: ABUD-REQ-001
BO Form No.6
an Date: 9/22/15
an Time: 4:24:35 PM

State of Alabama
Agency Budget Request
Personnel Classification

)epartment 059 - Environmental Manage

ersonnel Cost						
107 - Overtime		632				
109 - Termination Cost, Annual Leave		150,714				50,00
114 - Board Members Compensation		3,800				
116 - Longevity Allowances		368,300				
117 - Termination Costs, Sick Leave		102,622				25,00
129 - Bonus						40
Totals		**626,068**	**0.00**	**0**	**0.00**	**75,40**

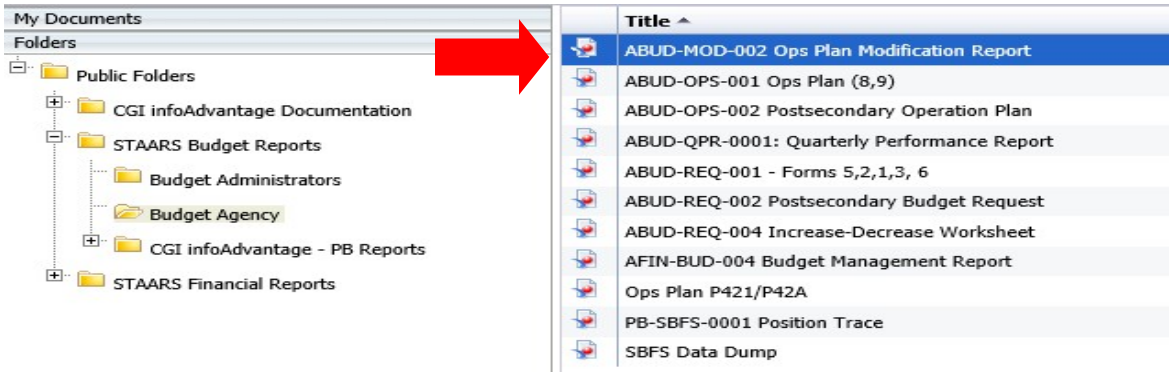
ther Personnel Information	Actual 2015	Budgeted 2016	Requested 2017
990 - # of Anniversary/Annual/Promotional Raises OPI)	332	539	50
993 - # of Vacant Positions Filled (OPI)		64	
994 - # of Employees on September 30 (OPI)	584	648	64

BUDGET REVISION PACKET

****All reports created for the Budget Revision Packet will need to be attached in the Document Management tab.****

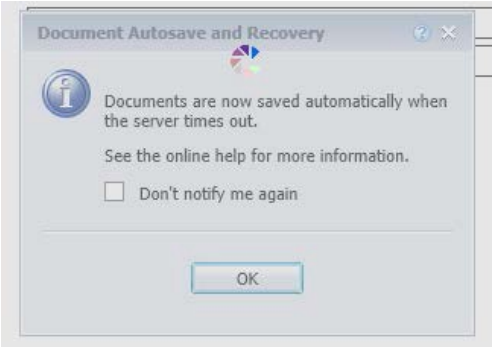
Follow Steps 1-6 in the Login Section above.

Step 7. Select the **ABUD-MOD-002 Ops Plan Modification Report**.

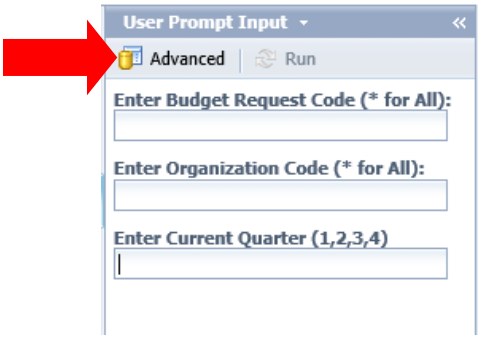


Step 8. Allow the report to completely load, then click **Advanced** in the **User Prompt Input** box.

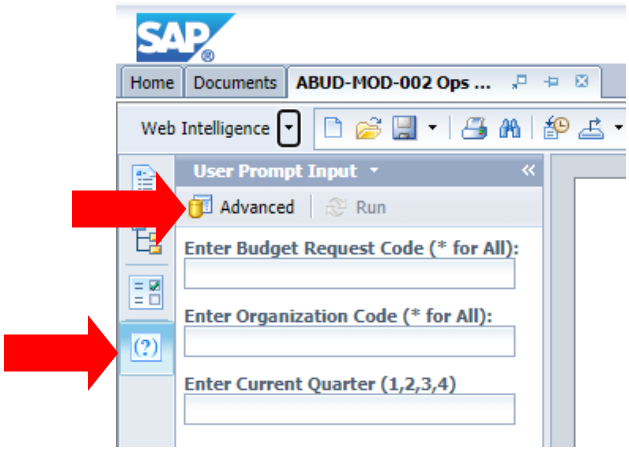
Loading screen:



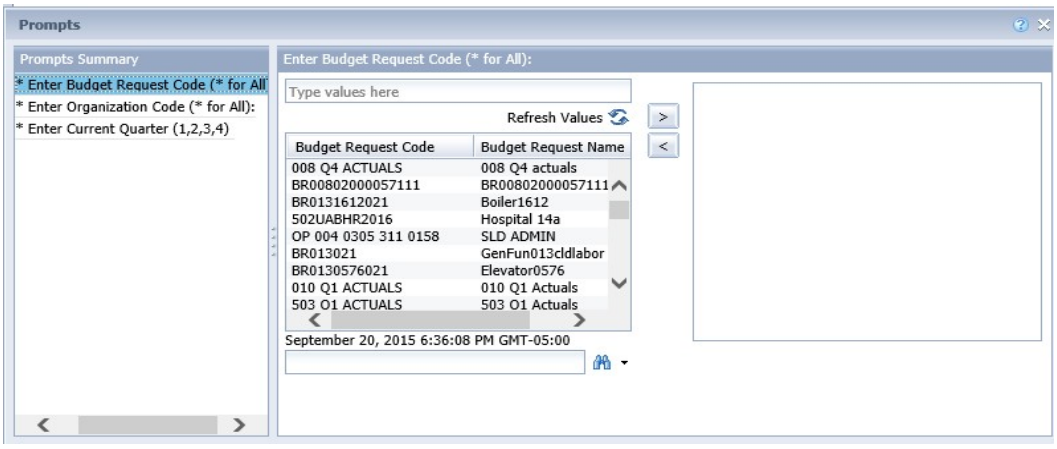
User Prompt Input:



Step 9. If the **User Prompt Input** box does not display when the report originally loads, click on the **Question Mark** then the **Advanced Prompt** on the far left.

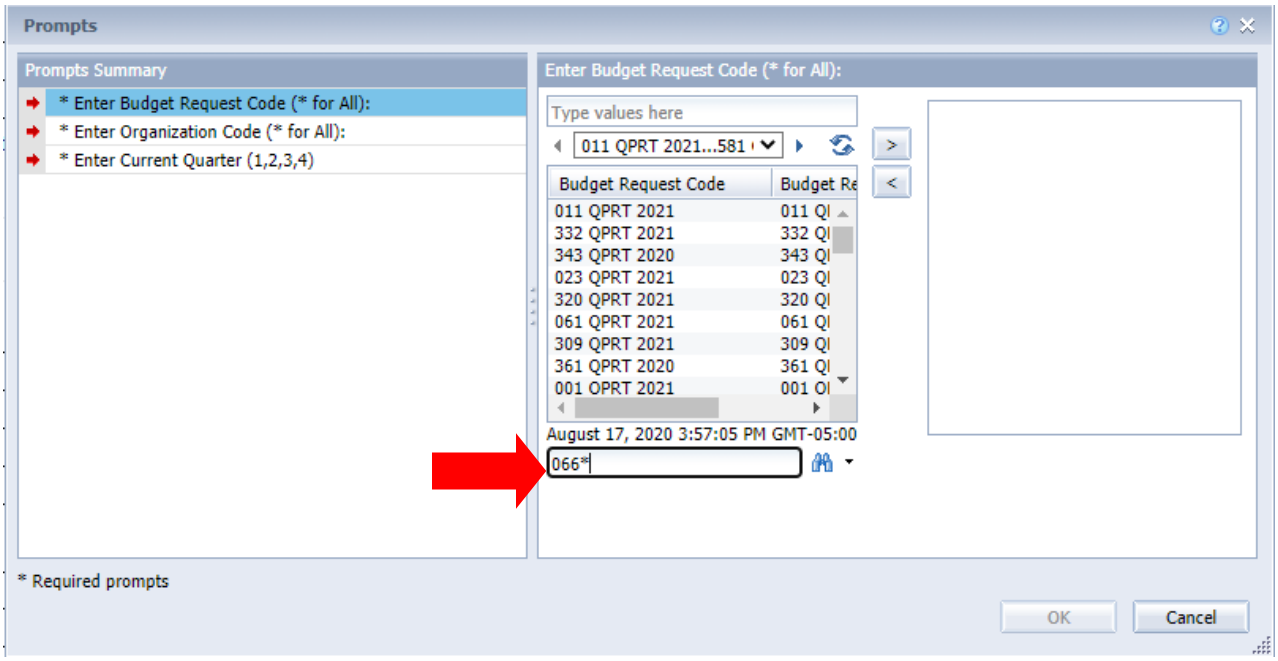


The following screen will display:

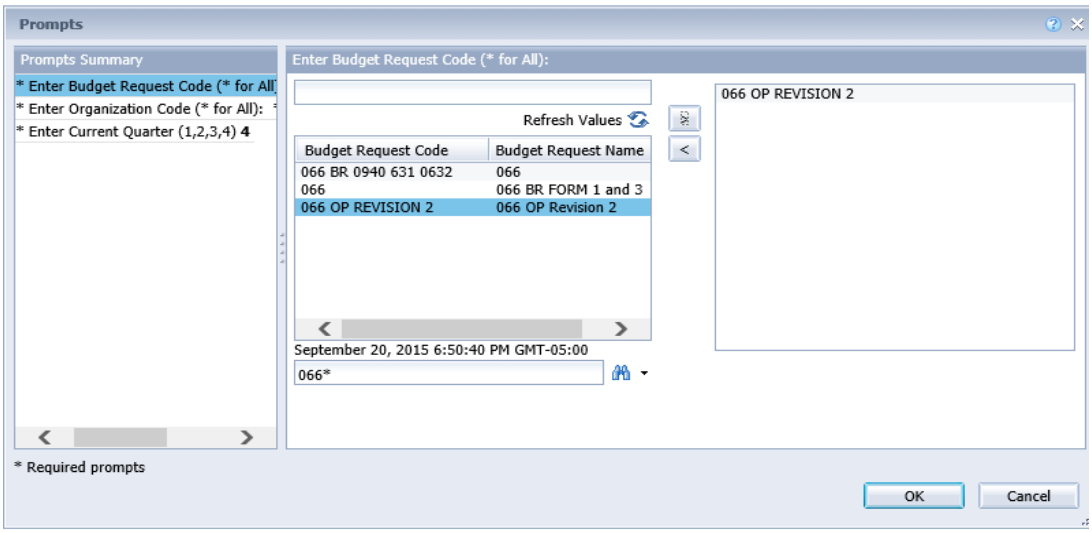


This prompt is for the revision. You are looking for the revision by code that was entered into the STAARS Budgeting application. For this example, the Budget Request Code was 066 OP Revision 2.

Step 10. To quickly locate, key the <u>agency number</u> with the wildcard (*) in the field with the binoculars.

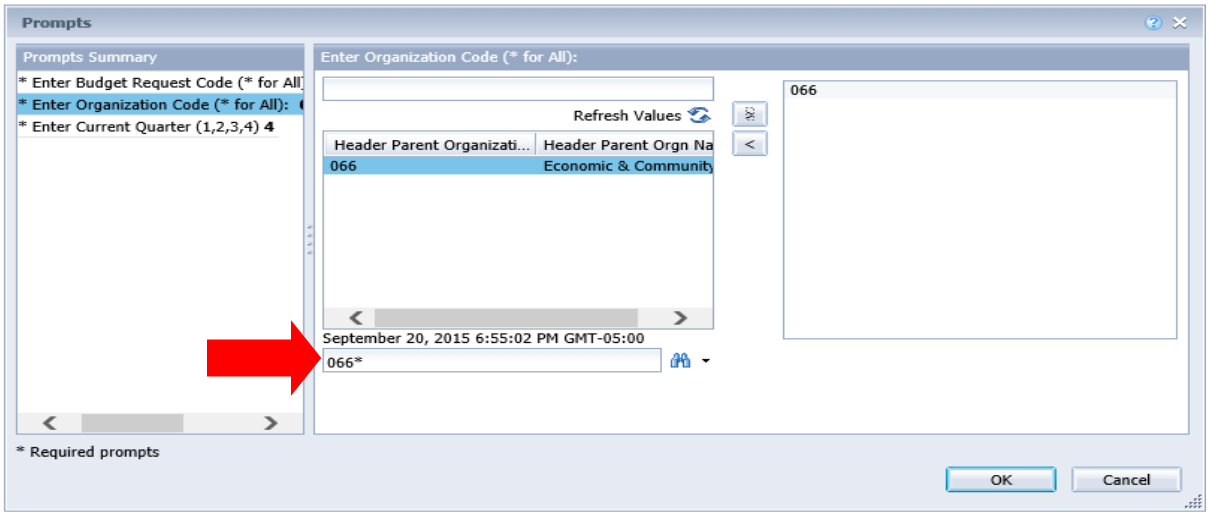


Step 11. Locate the revision, select it by double clicking or use the greater than arrow at the top to populate in the box to the right. Remove any items that may already be in the box with the less than arrow.

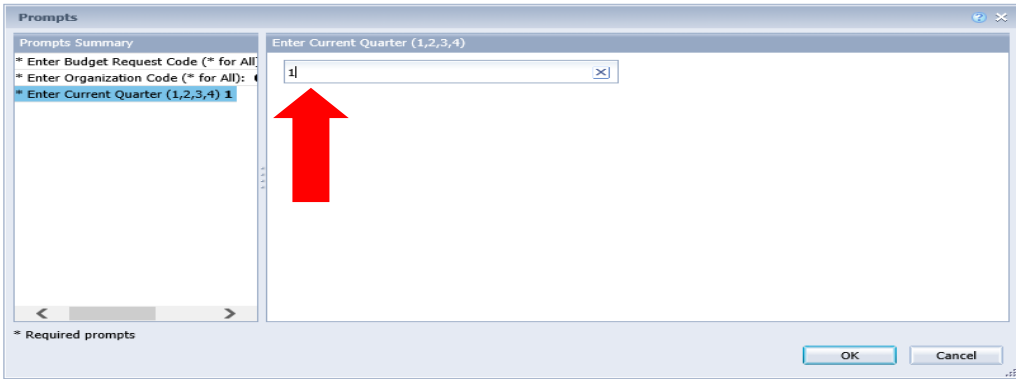


The second prompt is for the Department number.

Step 12. Use the binoculars at the bottom to search for your department. Remove any items that may already be in the box with the less than arrow.

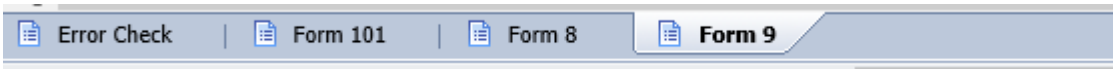


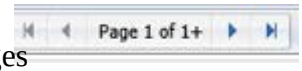
Step 13. The third prompt is for the current quarter. Enter the current quarter by number (1, 2, 3, and 4) in the box.



Step 14. When all prompts have been entered, click **OK** in the bottom to begin running the report for the revision. The report will then generate for the revision.

<u>Note</u> the multiple tabs at the bottom of the report. There should always be an **Error Check Page**, a **Form 101**, the **Form 8** (possibly multiples) and a **Form 9**.

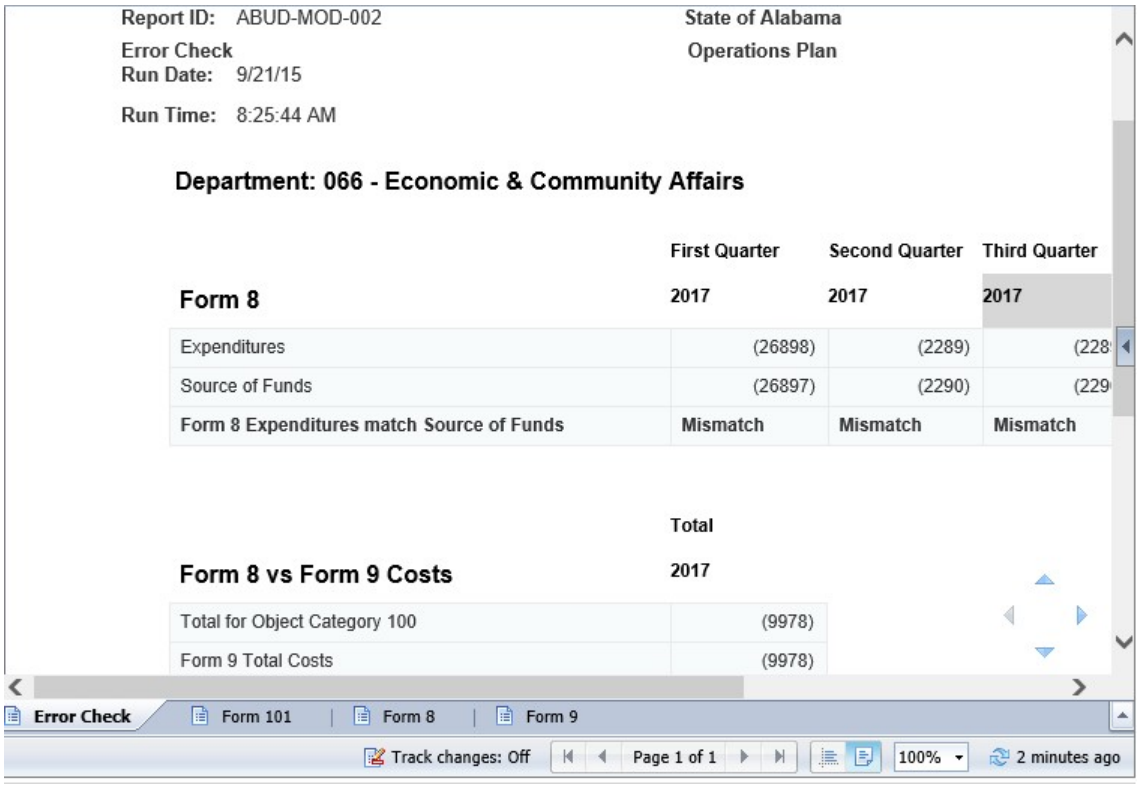


<u>Note</u> additional pages 

When the plus sign is visible, this means there are multiple pages for this tab of the report.

EXAMPLES

Error Check Report:



Report ID: ABUD-MOD-002
Error Check
Run Date: 9/21/15
Run Time: 8:25:44 AM

State of Alabama
Operations Plan

Department: 066 - Economic & Community Affairs

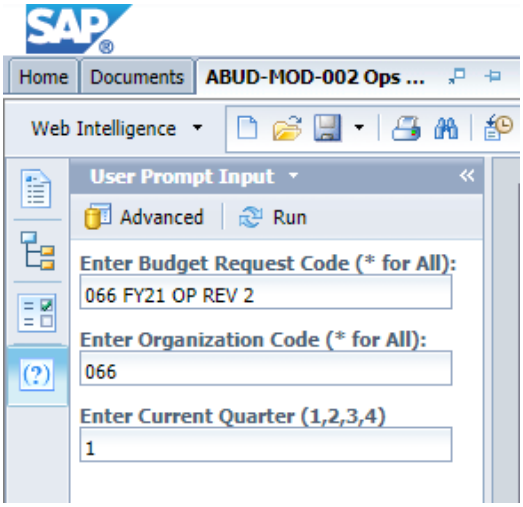
Form 8	First Quarter 2017	Second Quarter 2017	Third Quarter 2017
Expenditures	(26898)	(2289)	(228
Source of Funds	(26897)	(2290)	(229
Form 8 Expenditures match Source of Funds	Mismatch	Mismatch	Mismatch

Form 8 vs Form 9 Costs	Total 2017
Total for Object Category 100	(9978)
Form 9 Total Costs	(9978)

Error Check | Form 101 | Form 8 | Form 9

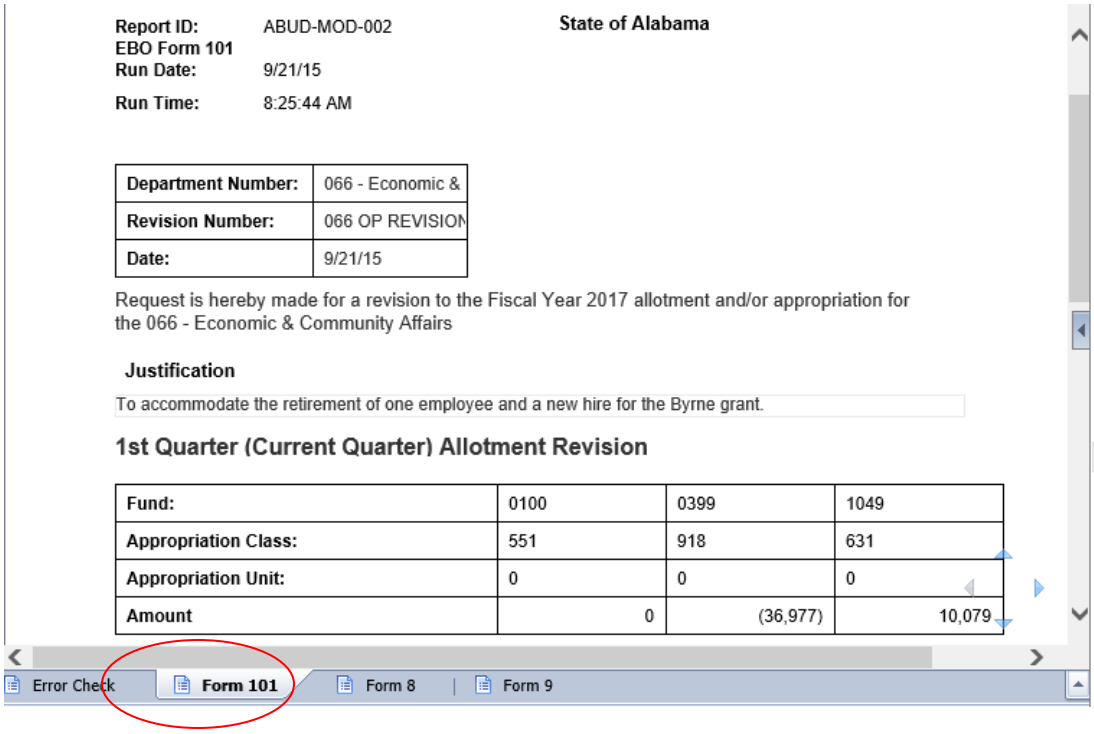
Track changes: Off | Page 1 of 1 | 100% | 2 minutes ago

If there are Errors noted on the **Error Check** page (as displayed with **Mismatch**), you must return to STAARS Budgeting to make corrections before downloading the final report for submittal. After corrections are made, return to infoAdvantage to run the report again.



Step 15. Click the **Run** button in the **User Prompt Input** box.

Step 16. Click the **Form 101** tab. This is a look at the top portion of the 101 Form (Allotment Revision section).



Report ID: ABUD-MOD-002
EBO Form 101
Run Date: 9/21/15
Run Time: 8:25:44 AM

State of Alabama

Department Number:	066 - Economic &
Revision Number:	066 OP REVISION
Date:	9/21/15

Request is hereby made for a revision to the Fiscal Year 2017 allotment and/or appropriation for the 066 - Economic & Community Affairs

Justification

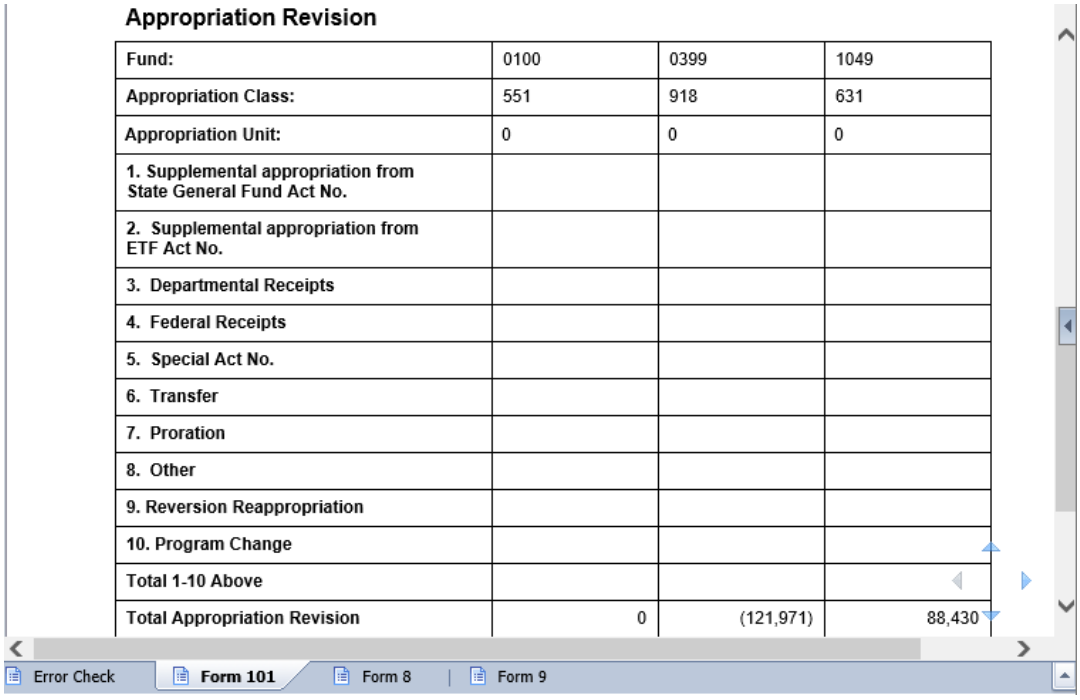
To accommodate the retirement of one employee and a new hire for the Byrne grant.

1st Quarter (Current Quarter) Allotment Revision

Fund:	0100	0399	1049
Appropriation Class:	551	918	631
Appropriation Unit:	0	0	0
Amount	0	(36,977)	10,079

Error Check | Form 101 | Form 8 | Form 9

And a look at the bottom portion of the Form 101 (Appropriation Revision section).



Appropriation Revision

Fund:	0100	0399	1049
Appropriation Class:	551	918	631
Appropriation Unit:	0	0	0
1. Supplemental appropriation from State General Fund Act No.			
2. Supplemental appropriation from ETF Act No.			
3. Departmental Receipts			
4. Federal Receipts			
5. Special Act No.			
6. Transfer			
7. Proration			
8. Other			
9. Reversion Reappropriation			
10. Program Change			
Total 1-10 Above			
Total Appropriation Revision	0	(121,971)	88,430

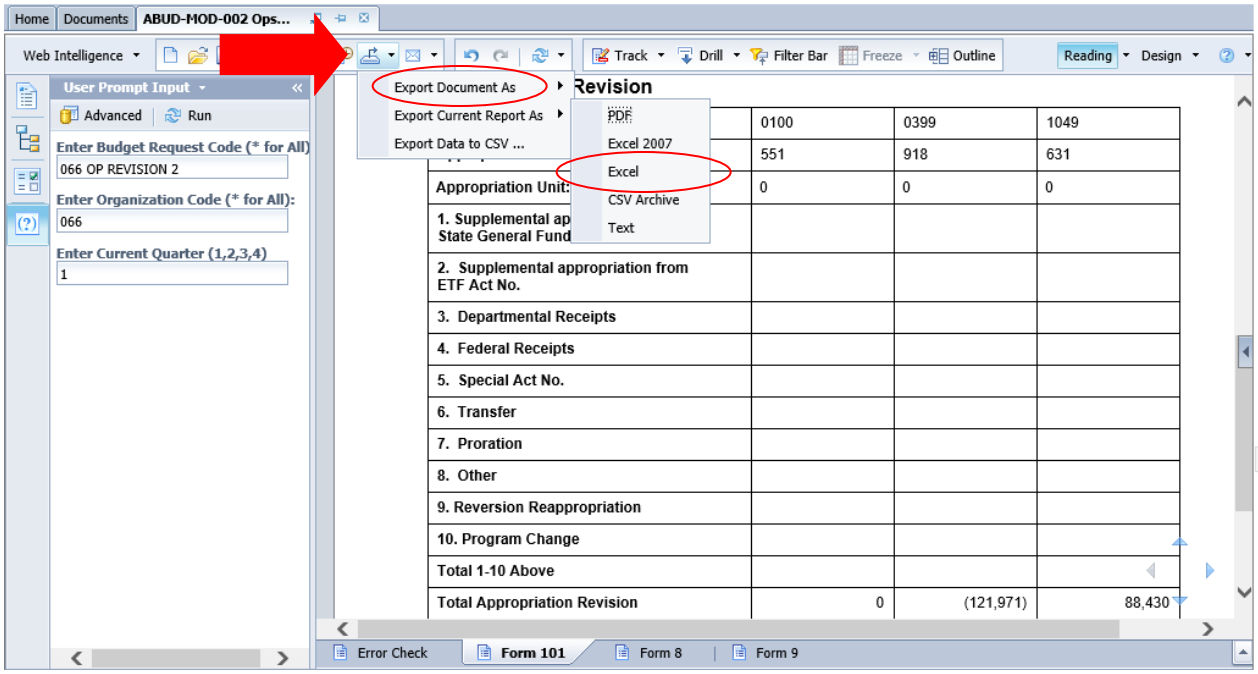
Error Check | Form 101 | Form 8 | Form 9

EXPORTING TO EXCEL

If amounts display in the **Amount** section of the **Allotment Revision** or in the **Total Appropriation Revision** section in the bottom, you must download the Form to Excel to provide detailed information on the type of Appropriation Revision.

Step 1. To download the report, click **Export**.

(To export just a page of the report, use the **Export Current Report As**, then select **Excel)**.



Step 2. In Excel, you will enter the types of adjustments to the form, whether it is a Supplemental appropriation, a transfer from another agency, a Program Change, etc.

E25

	A	B	C	D	E	F
17						
18	**Appropriation Revision**					
19	**Fund:**		0100	0399	1049	
20	**Appropriation Class:**		551	918	631	
21	**Appropriation Unit:**		0	0	0	
22	**1. Supplemental appropriation from State General Fund Act No.**					
23	**2. Supplemental appropriation from ETF Act No.**					
24	**3. Departmental Receipts**			(60,000)		(88,430)
25	**4. Federal Receipts**			(61,971)		
26	**5. Special Act No.**					
27	**6. Transfer**					
28	**7. Proration**					
29	**8. Other**					
30	**9. Reversion Reappropriation**					
31	**10. Program Change**					
32	**Total 1-10 Above**					
33	**Total Appropriation Revision**		0	(121,971)		88,430

Step 3. Check to ensure that the totals entered agree with the **Total Appropriation Revision** amount.

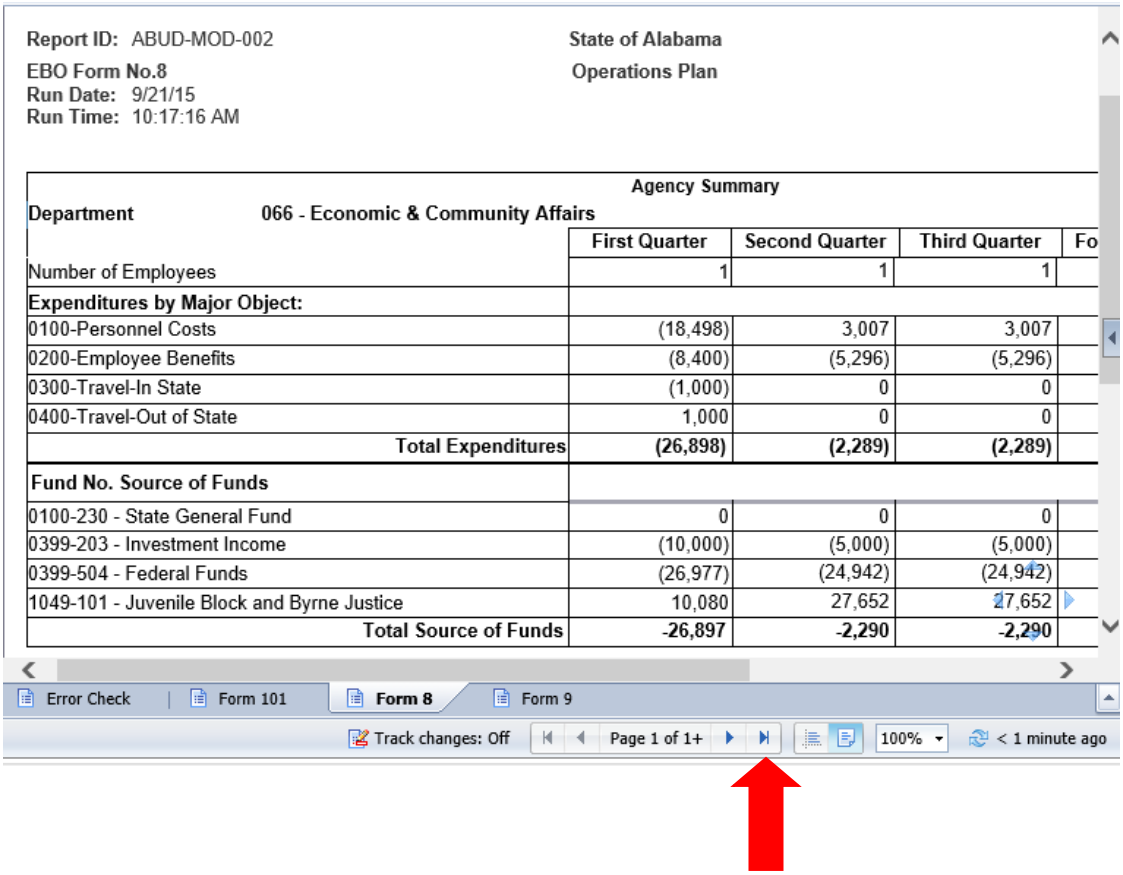
Step 4. In row 32, sum the amounts entered in rows 22 through 31.

Step 5. Once complete, save the Excel spreadsheet using the following format:

EXAMPLE: 066 FY21 Revision 2 Form 101

- Agency Number: **066**
- Fiscal Year: **FY21**
- Revision Number: **REV 2**
- Form Name: **Form 101**

Step 6. Click the arrows to move between the pages to view.



Report ID: ABUD-MOD-002
EBO Form No.8
Run Date: 9/21/15
Run Time: 10:17:16 AM

State of Alabama
Operations Plan

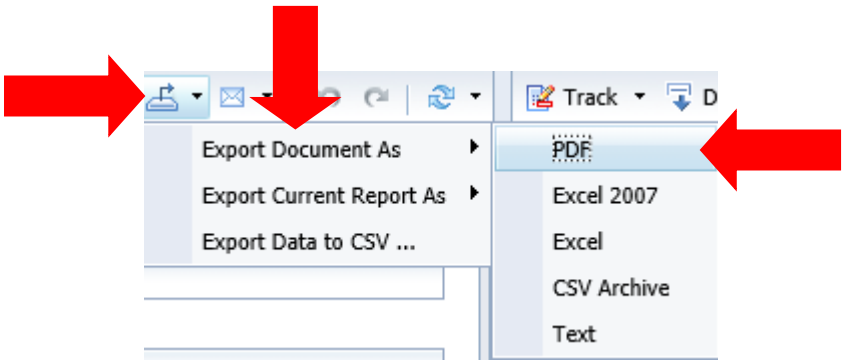
Agency Summary

Department 066 - Economic & Community Affairs

	First Quarter	Second Quarter	Third Quarter	Fo
Number of Employees	1	1	1	
Expenditures by Major Object:				
0100-Personnel Costs	(18,498)	3,007	3,007	
0200-Employee Benefits	(8,400)	(5,296)	(5,296)	
0300-Travel-In State	(1,000)	0	0	
0400-Travel-Out of State	1,000	0	0	
Total Expenditures	**(26,898)**	**(2,289)**	**(2,289)**	
Fund No. Source of Funds				
0100-230 - State General Fund	0	0	0	
0399-203 - Investment Income	(10,000)	(5,000)	(5,000)	
0399-504 - Federal Funds	(26,977)	(24,942)	(24,942)	
1049-101 - Juvenile Block and Byrne Justice	10,080	27,652	27,652	
Total Source of Funds	**-26,897**	**-2,290**	**-2,290**	

When you are ready to submit your revision, **you will need to save the PDF version of the Revision Packet**.

Step 7. Using the **Export** key at the top of the screen, select **Export Document As**, and then select **PDF**.



Step 8. Save the report package using the following format:

EXAMPLE: 066 FY21 REV 2

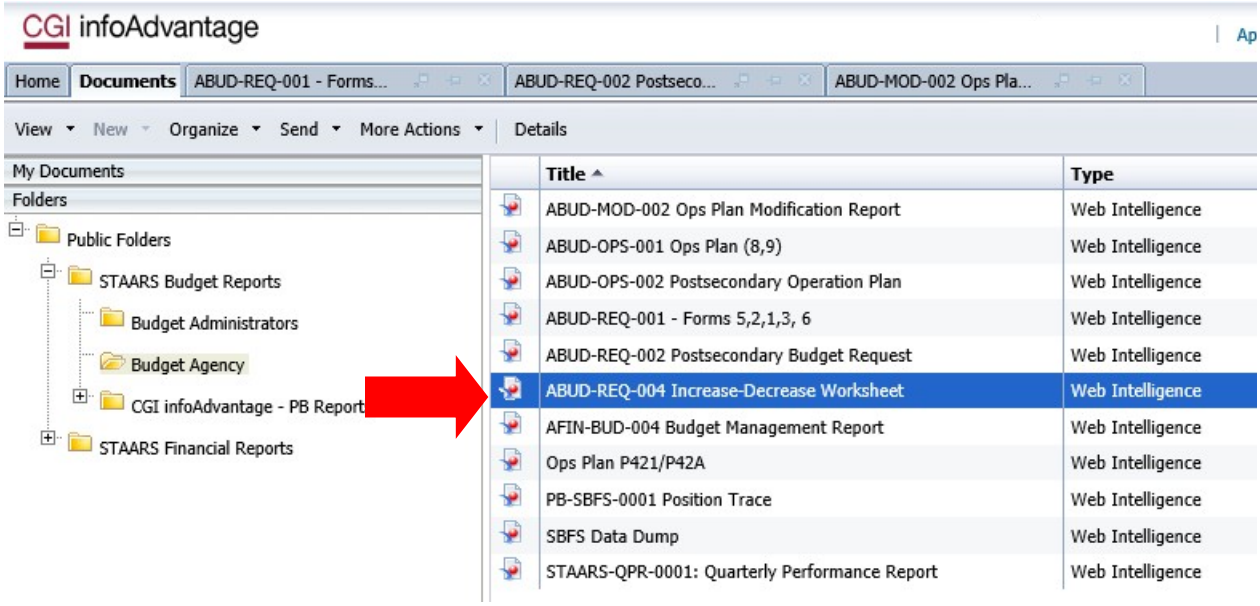
- Agency Number: **066**
- Fiscal Year: **FY21**
- Revision Number: **REV 2**

INCREASE-DECREASE WORKSHEET

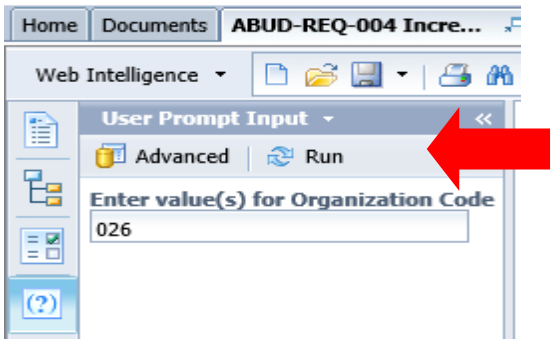
****The Increase-Decrease Worksheet created for the Budget Request Packet will need to be attached in the Document Management tab on Forms 1 and 3 with all other Budget Request Packet attachments.****

Follow Steps 1-6 in the Login Section above.

Step 7. Select the **ABUD-REQ-004 – Increase-Decrease Worksheet**



Step 8. Enter the 3-digit department code in the **Enter value(s) for Organization Code** prompt.



Step 9. Click **Run**.

EXAMPLE

Increase-Decrease Worksheet:

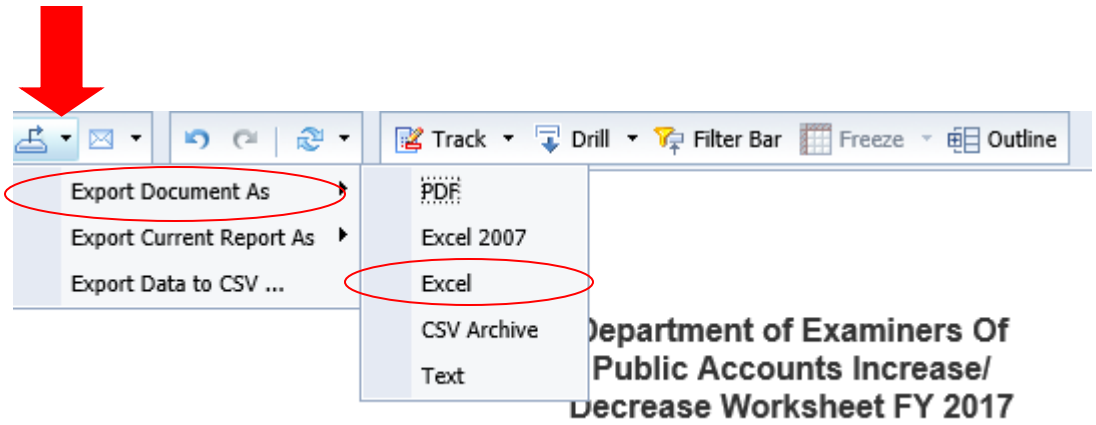
Department of Examiners Of Public Accounts Increase/ Decrease Worksheet FY 2017

	General Fund	ETF	Earmarked Funds	Total
FY 2016 Budgeted Expenditures	7,006,014	6,266,034	9,977,244	23,249,292
0100 - Personnel Costs	3,899,847.23	-1,254,797.49	-2,237,603	407,446.74
0200 - Employee Benefits	1,380,792.16	-489,740.55	-836,468	54,583.61
0300 - Travel-In State	916,526	3,704,319	-309,041	4,311,804
0400 - Travel-Out of State		-3,940	-209	-4,149
0500 - Repairs and Maintenance		1,096	1,064	2,160
0600 - Rentals and Leases	112,200	31,563	-138,854	4,909
0700 - Utilities and Communication	11,000	15,913	-25,130	1,783
0800 - Professional Fees and Services	167,000	130,909	-173,894	124,015
0900 - Supplies, Materials, and Operating Expenses	614,000	50,832	-74,832	590,000
1000 - Transportation Equipment Operations	1,600	593	-2,193	0
1100 - Grants and Benefits				
1200 - Capital Outlay				

EXPORTING TO EXCEL

Step 1. To download the report, click **Export.**

To export just a page of the report, use the **Export Current Report As**, then select **Excel.**



Step 2. Save in the following format:

026 FY17 Budget Request Increase Decrease

Step 3. Provide the justifications for the increases and decrease for each fund and object.

EXAMPLE: 0100 Personnel Costs

- New Hires
- Termination Cost
- Longevity
- Subsistence, etc.