



For creating reports for Budget Requests, Operation Plans, and Budget Revisions that will be submitted to the Executive Budget Office through electronic workflow.

STAARS INFOADVANTAGE

**Reporting Manual for Postsecondary
Institutions**

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STAARS INFOADVANTAGE REPORTING MANUAL
FOR POSTSECONDARY INSTITUTIONS

Welcome to STAARS infoAdvantage! STAARS infoAdvantage is the tool for creating report 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 **Postsecondary Institutions** for the following:

BUDGET REQUEST FORMS

- **Form 14** Financial Summary
- **Form 17** Personnel
- **Form 14A** Hospital Financial Summary (if applicable)
- **Form 14B** Industries for the Blind (if applicable)

OPERATIONS PLAN FORMS

- **Form 20** PS Operations Plan
- **Form 21** PS Ops Plan-Expenditures & Transfer

BUDGET REVISIONS

- **Form 8** – Operations Plan
- **Form 9** – Employee Staffing Plan
- **Form 101** – Used for increasing appropriation, 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 made in Microsoft Excel in order include the form with the Packet that is attached in the Document Management tab.

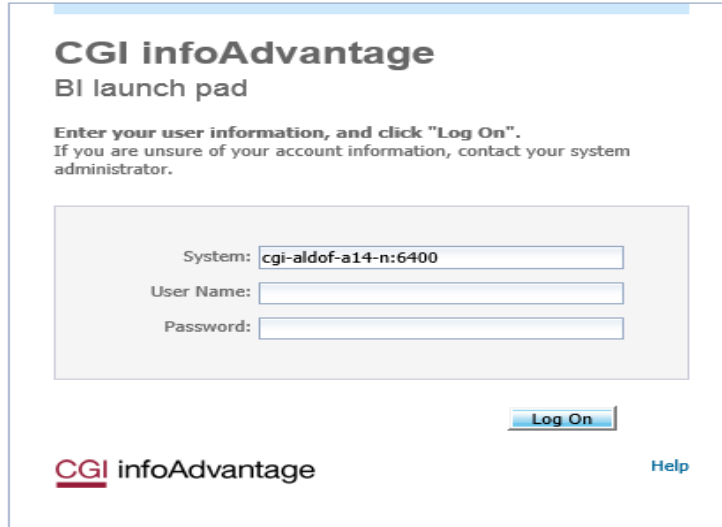
Accessing STAARS infoAdvantage:

STAARS infoAdvantage has a separate login URL and screen than the STAARS Performance Budgeting application. 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 Performance Budgeting application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to generate the reports.

Please contact STAARS Support at 334-353-9000 or financialsystems@comptroller.alabama.gov if you need access to infoAdvantage.

LOGGING INTO STAARS INFOADVANTAGE

Step 1. Log into CGI infoAdvantage using <https://staarsinfo.alabama.gov/BOE/BI>



CGI infoAdvantage
BI launch pad

Enter your user information, and click "Log On".
If you are unsure of your account information, contact your system administrator.

System:

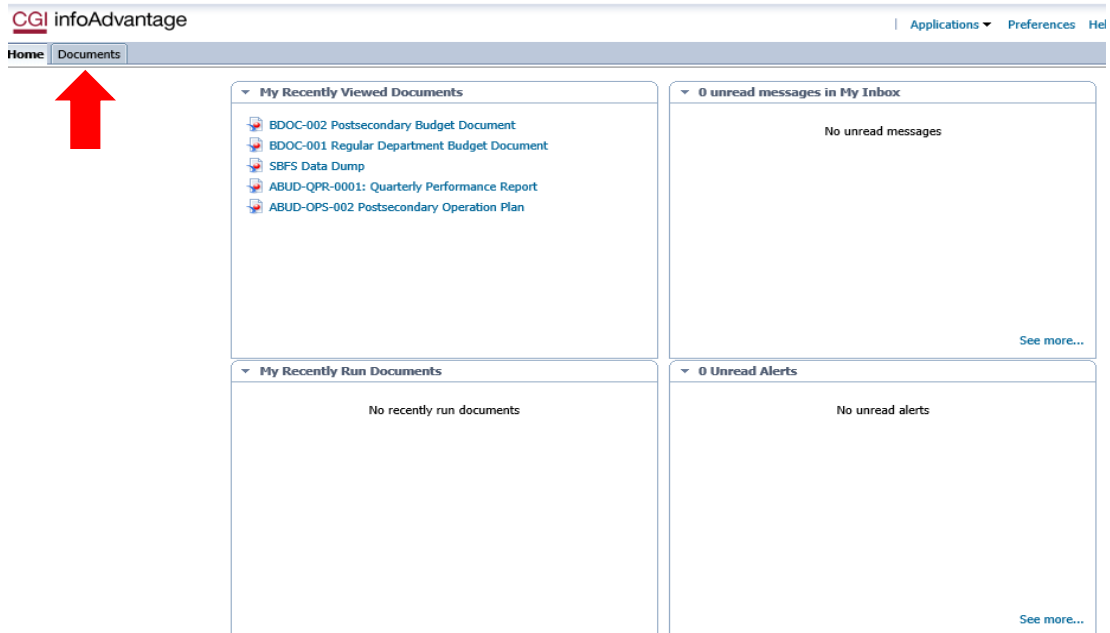
User Name:

Password:

CGI infoAdvantage [Help](#)

Step 2. On the **Welcome Screen**, four message boxes will appear. The first box will include a list of My Recently Viewed Documents. The report you plan to generate may be in this section.

Step 3. If the report you need to run is not in the Recently Viewed area, click **Documents** on the tool bar at the top of the screen.



CGI infoAdvantage | Applications ▾ Preferences Hel

Home Documents

My Recently Viewed Documents

- BDOC-002 Postsecondary Budget Document
- BDOC-001 Regular Department Budget Document
- SBFS Data Dump
- ABUD-QPR-0001: Quarterly Performance Report
- ABUD-OPS-002 Postsecondary Operation Plan

0 unread messages in My Inbox

No unread messages

[See more...](#)

My Recently Run Documents

No recently run documents

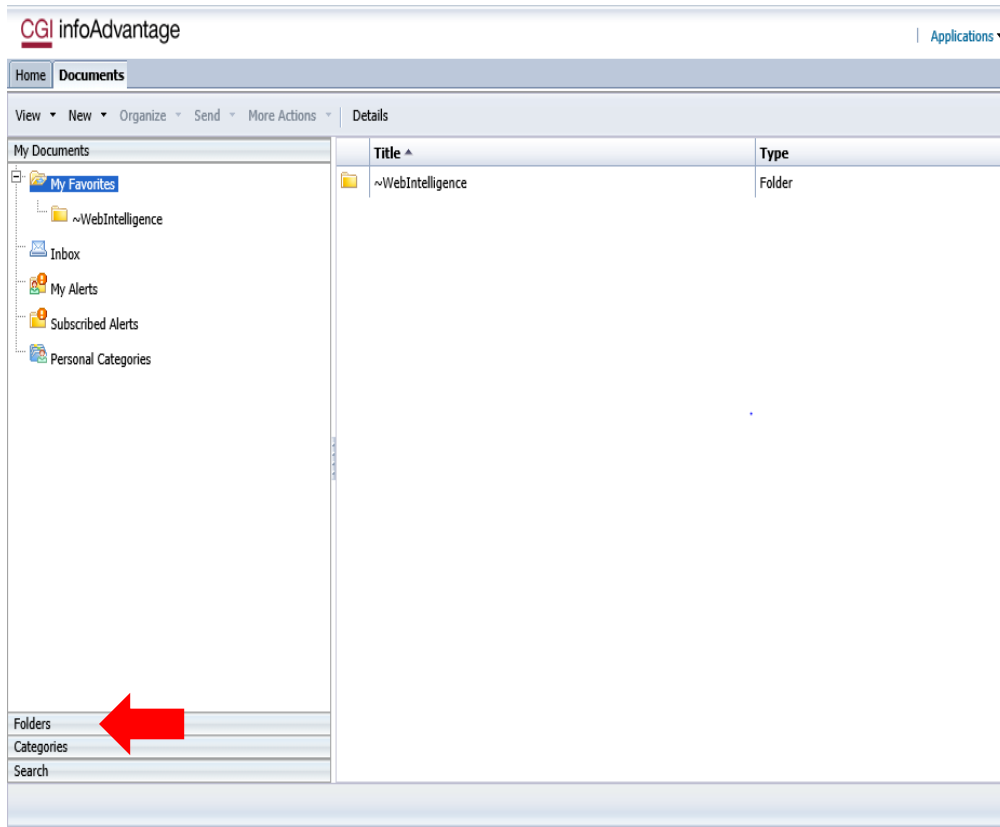
0 Unread Alerts

No unread alerts

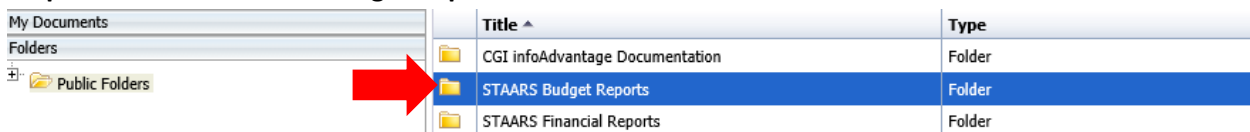
[See more...](#)

A red arrow points to the **Documents** tab in the top navigation bar.

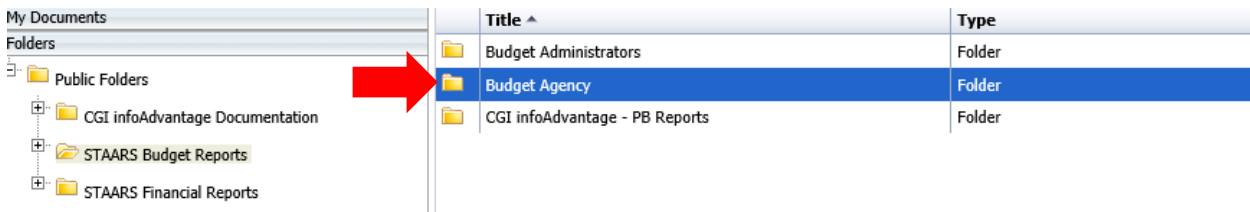
Step 4. Select the **Folders** tab at the bottom of the screen.



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



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



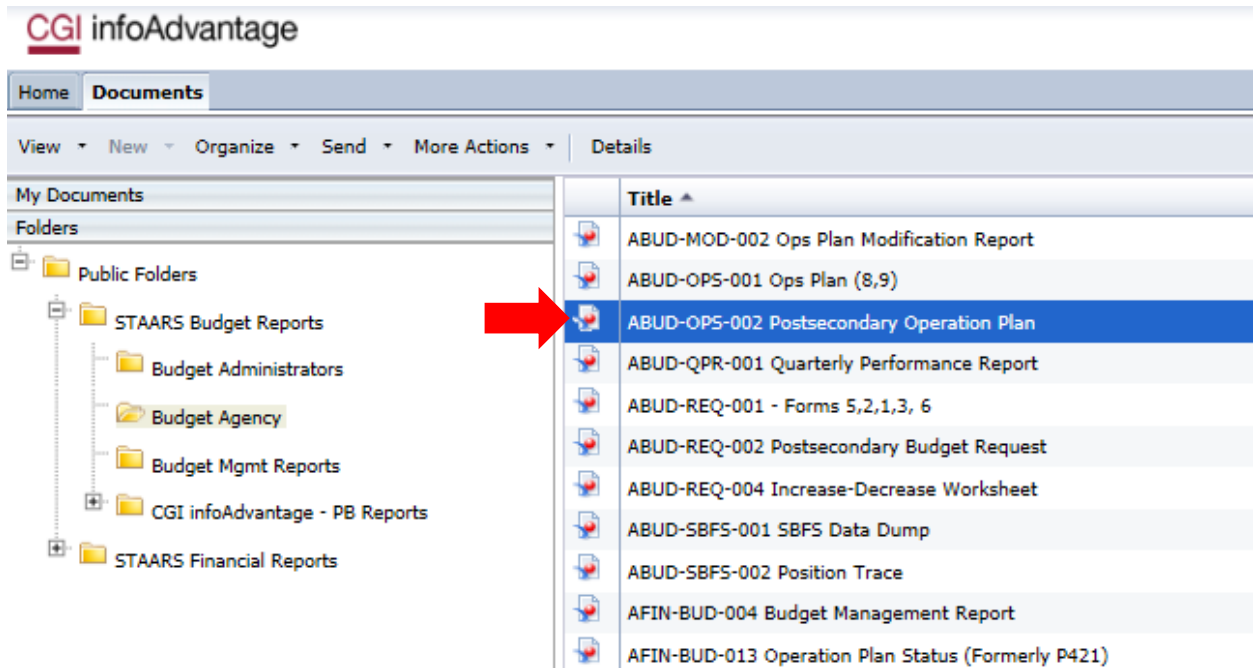
Determine which report you would like to generate and skip to that section of the manual: Operations Plan (pg. 5), Budget Request (pg. 9), or Budget Revision (pg.14).

OPERATIONS PLAN PACKET

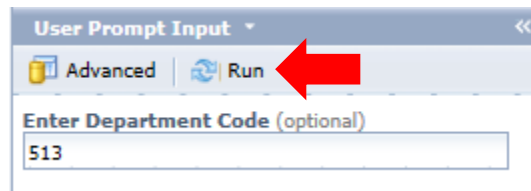
All reports created for Operation Plans will need to be added in the Document Management tab in PB.

Follow Steps 1-6 in the Login Section above.

Step 7. To generate the **Operations Plan** packet, Select **ABUD-OPS-002 Postsecondary Operation Plan**.



Step 8. Double click on ABUD-OPS-002 to open the prompts needed to enter the institution code. Enter the agency number in the prompt. Then click **Run**.



Step 9. Once the report has generated, the **Error Check Page** will appear on the screen. To view the full report, use the Form 20 and Form 21 tabs at the bottom of the page. For faster viewing, it is recommended that agencies download the report to PDF or Excel.

If the Error Check Page shows all "OK" on Forms and data is correct, export the report as PDF and save to your PC.

****If the Error Check Report has any Mismatches in the columns, you MUST return to STAARS Performance Budgeting and make corrections. Continue this procedure until all columns show "OK" on the Error Check Page.**

EXAMPLE - ERROR CHECK REPORT

Report ID: ABUD-OPS-002

Department No. 513

**State of Alabama
Postsecondary Operation Plan**

Error Page

Institution Name:	Troy University
Current Unrestricted Funds	Current Restricted Funds
	Form

Current Funds - Form 20 Validation			
TOTAL CURRENT FUNDS EXPENDITURES AND TRANSFERS	223,890,985	12,697,995	20
TOTAL SOURCE OF CURRENT FUNDS	223,890,985	12,697,995	20
	Ok	Ok	

Current Funds - Form 21 Validation			
TOTAL CURRENT FUNDS EXPENDITURES AND TRANSFERS	223,890,985	12,697,995	20
GRAND TOTAL CURRENT FUNDS EXPENDITURES AND TRANSFERS	223,890,985	12,697,995	21
	Ok	OK	

Total E&G Expenditures Validation			
TOTAL EDUCATIONAL AND GENERAL EXPENDITURES BY FUNCTION	200,639,145	12,697,995	20
TOTAL EDUCATIONAL AND GENERAL EXPENDITURES BY OBJECT	200,639,145	11,601,773	21
	Ok	Mismatch	

E&G Transfers Validation			
Mandatory	13,216,551		20
Non Mandatory	21,119		20
TOTAL FORM 20 EDU AND GEN TRANSFERS	13,237,670		
TOTAL BUD E&G TRANSFERS	13,237,670	1,096,222	21
	Ok	Mismatch	

EXAMPLE - FORM 20

STATE OF ALABAMA

Department No. 513

EBO Form No. 20

POSTSECONDARY OPERATIONS PLAN
BUDGETED EXPENDITURES &
TRANSFERS DETAIL

Fiscal Year:

Institution Name: Troy University

	Current Unrestricted Funds	Current Restricted Funds	Current Combined Funds
Source of Current Funds:			
ETF Appropriation - Operations and Maintenance	49,053,360		49,053,360
ETF Appropriation - Agriculture Center Board	250,000		250,000
State Department of Education - In-Service Center	232,309		232,309
Other State Funds	875,294	8,081,251	8,956,545
Federal Funds	500,000	3,914,395	4,414,395
Tuition and Fees	144,748,954		144,748,954
Other Sources: Athletics Revenues	5,485,056		5,485,056
Other Sources: Endowments	652,858		652,858
Other Sources: Educational Sales and Service	2,558,626		2,558,626
Other Sources: Grants and Contracts	42,000	702,349	744,349
Auxiliary Enterprises:			
Sales and Service	19,492,528		19,492,528
TOTAL SOURCE OF CURRENT FUNDS	223,890,985	12,697,995	236,588,980
CURRENT FUNDS EXPENDITURES AND TRANSFERS:			
Educational and General:			
Instruction	67,481,026	6,602,957	74,083,983
Research	122,156	152,376	274,532
Public Service	3,141,786	4,825,238	7,967,024
Academic Support	16,875,706	190,470	17,066,176

EXAMPLE - FORM 21

STATE OF ALABAMA

Department No. 513

EBO Form No. 21

**POSTSECONDARY OPERATIONS PLAN
BUDGETED EXPENDITURES &
TRANSFERS DETAIL**

Fiscal Year:

Institution Name: Troy University

	Current Unrestricted Funds	Current Restricted Funds	Current Combined Funds
BUDGETED E&G EXPENDITURES:			
Salaries and Wages	88,975,909	7,297,133	96,273,042
Employee Benefits	28,093,265	1,675,789	29,769,054
Supplies & Expenses	44,206,338	1,455,513	45,661,851
Equipment and Other Capital Assets	895,765	33,600	929,365
Fuel and Metered Utilities	7,955,370		7,955,370
Scholarships and Fellowships	30,512,498	1,139,738	31,652,236
TOTAL EDUCATIONAL AND GENERAL EXPENDITURES BY OBJECT	200,639,145	11,601,773	212,240,918
BUDGETED E&G TRANSFERS:			
Debt Service	13,216,551		13,216,551
Other: Mobile Racing Comm.	21,119	1,096,222	1,117,341
TOTAL BUD E&G TRANSFERS	13,237,670	1,096,222	14,333,892
TOTAL E&G EXPENDITURES AND TRANSFERS	213,876,815	12,697,995	226,574,810
AUXILIARY ENTERPRISES:			
Salaries and Wages	1,169,000		1,169,000
Employee Benefits	213,809		213,809
Supplies and Expenses	8,631,361		8,631,361
TOTAL AUXILIARY EXPENDITURES AND TRANSFERS	10,014,170		10,014,170
GRAND TOTAL CURRENT FUNDS EXPENDITURES AND TRANSFERS	223,890,985	12,697,995	236,588,980

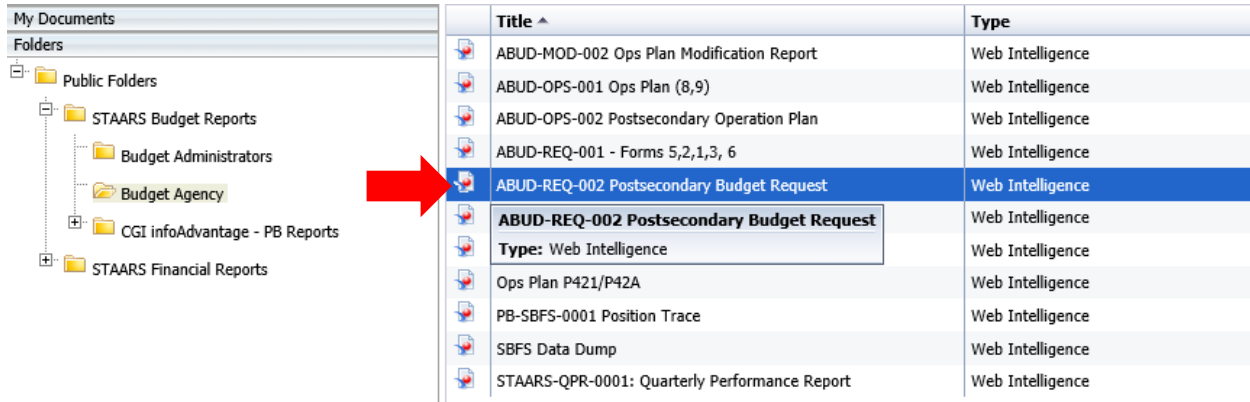
Step 10. You have now generated the Operations Plan packet. Return to the Operation Plan forms in the Performance Budgeting application to attach a copy of the report to the Document Management tab.

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. Select ABUD-REQ-002 – Postsecondary Budget Request.

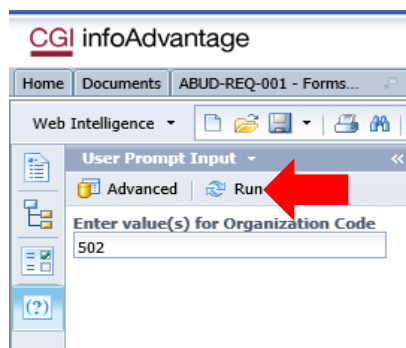


Title ^	Type
ABUD-MOD-002 Ops Plan Modification Report	Web Intelligence
ABUD-OPS-001 Ops Plan (8,9)	Web Intelligence
ABUD-OPS-002 Postsecondary Operation Plan	Web Intelligence
ABUD-REQ-001 - Forms 5,2,1,3, 6	Web Intelligence
ABUD-REQ-002 Postsecondary Budget Request	Web Intelligence
ABUD-REQ-002 Postsecondary Budget Request	Web Intelligence
Type: Web Intelligence	Web Intelligence
Ops Plan P421/P42A	Web Intelligence
PB-SBFS-0001 Position Trace	Web Intelligence
SBFS Data Dump	Web Intelligence
STAARS-QPR-0001: Quarterly Performance Report	Web Intelligence

Use the **User Prompt Input** section on the left 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 institution code in the box for **Enter Value(s) for Organization Code** under the **User Prompt Input** section.

Step 9. Click **Run**



CGI infoAdvantage

Home Documents ABUD-REQ-001 - Forms...

Web Intelligence

User Prompt Input

Advanced Run

Enter value(s) for Organization Code

502

Step 10. Review **Error Listing Report** for any Forms 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 Listing Report has any Mismatched notations under the Actual, Budgeted or Requested columns return to STAARS Budgeting for corrections.**

You have now generated the Budget Request packet. Return to the Budget Form 1 & 3 in the Performance Budgeting application to attach a copy of the report to the Document Management tab.

EXAMPLES

ERROR LISTING REPORT

Error Listing		Institution: 502 - University Of Ala - Birmingham		
Form 14 Restricted	Actual	Estimated	Requested	
EDUCATIONAL AND GENERAL ENDING BALANCE		\$0	\$0	\$0
Total(s) are negative	OK	OK	OK	
Form 14 Restricted	Actual	Estimated	Requested	
TOTAL EDUCATIONAL AND GENERAL EXPENDITURES	\$348,506,950	\$367,394,218	\$367,394,218	
TOTAL E & G EXPENDITURES BY FUNCTION	\$348,506,950	\$367,394,218	\$367,394,218	
Total(s) don't agree	OK	OK	OK	

FORM 14 SUMMARY

Postsecondary Education Budget Request Financial Summary Condition of Current Funds				
Institution: 502 - University Of Ala - Birmingham			Reporting Unit: Combined	
	Actual	Estimated	Requested	Increase (Decrease) Amount
Educational and General Beginning Balance	\$399,923,206	\$399,923,206	\$399,923,206	\$0
Revenues				
ETF Appropriation - Operations & Maintenance	\$220,100,713	\$220,642,090	\$306,847,847	\$86,205,757
ETF Appropriation - Special Line Items	\$11,197,393	\$11,197,393	\$12,334,704	\$1,137,311
State Funds - In Service Center	\$281,923	\$281,923	\$417,142	\$135,219
Other State Funds	\$7,497,000	\$7,095,038	\$7,095,038	\$0
Federal Funds	\$379,359,810	\$333,417,445	\$333,417,445	\$0
Local Funds	\$888,950	\$1,063,671	\$1,063,671	\$0
Tuition and Fees	\$213,415,630	\$217,000,000	\$217,000,000	\$0
Other Sources: Miscellaneous	\$191,858,814	\$210,077,440	\$210,077,440	\$0
TOTAL E & G REVENUES	\$1,024,600,233	\$1,000,775,000	\$1,088,253,287	\$87,478,287
TOTAL AVAILABLE	\$1,424,523,439	\$1,400,698,206	\$1,488,176,493	\$87,478,287

FORM 14 RESTRICTED FUNDS

Postsecondary Education Budget Request Financial Summary Condition of Current Funds					
Institution: 502 - University Of Ala - Birmingham			Reporting Unit: Restricted Funds		
					Increase (Decrease)
	Actual	Estimated	Requested	Amount	
Educational and General Beginning Balance		\$0	\$0	\$0	
Revenues					
ETF Appropriation - Special Line Items	\$0	\$0	\$0	\$0	
Other State Funds	\$7,497,000	\$7,095,038	\$7,095,038	\$0	
Federal Funds	\$308,109,810	\$262,167,445	\$262,167,445	\$0	
Local Funds	\$888,950	\$1,063,671	\$1,063,671	\$0	
Tuition and Fees	\$0	\$0	\$0	\$0	
Other Sources: Miscellaneous	\$32,011,190	\$97,068,064	\$97,068,064	\$0	
TOTAL E & G REVENUES	\$348,506,950	\$367,394,218	\$367,394,218	\$0	
TOTAL AVAILABLE	\$348,506,950	\$367,394,218	\$367,394,218	\$0	

FORM 14 UNRESTRICTED FUNDS

Postsecondary Education Budget Request Financial Summary Condition of Current Funds					
Institution: 502 - University Of Ala - Birmingham			Reporting Unit: Unrestricted Funds		
					Increase (Decrease)
	Actual	Estimated	Requested	Amount	
Educational and General Beginning Balance	\$399,923,206	\$399,923,206	\$399,923,206	\$0	
Revenues					
ETF Appropriation - Operations & Maintenance	\$220,100,713	\$220,642,090	\$306,847,847	\$86,205,757	
ETF Appropriation - Special Line Items	\$11,197,393	\$11,197,393	\$12,334,704	\$1,137,311	
State Funds - In Service Center	\$281,923	\$281,923	\$417,142	\$135,219	
Federal Funds	\$71,250,000	\$71,250,000	\$71,250,000	\$0	
Tuition and Fees	\$213,415,630	\$217,000,000	\$217,000,000	\$0	
Other Sources: Miscellaneous	\$159,847,624	\$113,009,376	\$113,009,376	\$0	
TOTAL E & G REVENUES	\$676,093,283	\$633,380,782	\$720,859,069	\$87,478,287	
TOTAL AVAILABLE	\$1,076,016,489	\$1,033,303,988	\$1,120,782,275	\$87,478,287	

FORM 17 SUMMARY

Postsecondary Education Budget Request Personnel

Institution: 502 - University Of Ala - Birmingham

Reporting Unit: Combined

Full Time Instructional Workload	Actual		Estimated		Requested	
<u>Education and General Personnel by Function</u>	FTE	Amount	FTE	Amount	FTE	Amou
Edu and Gen - Instruction	\$3,067	\$164,323,338	\$3,044	\$163,113,910	\$3,428	\$189,27
Edu and Gen - Research	\$2,011	\$113,689,011	\$2,162	\$122,208,854	\$2,163	\$122,23
Edu and Gen - Public Service	\$666	\$36,613,720	\$686	\$37,725,935	\$732	\$40,87
Edu and Gen - Academic Support	\$1,595	\$85,767,731	\$1,592	\$85,629,711	\$1,778	\$98,34
Edu and Gen - Student Services	\$315	\$16,810,631	\$311	\$16,616,674	\$352	\$19,42
Edu and Gen - Institutional Support	\$1,365	\$72,871,123	\$1,347	\$71,933,315	\$1,529	\$84,31
Edu and Gen - Operation and Maintenance of Physical Plant	\$981	\$52,394,879	\$969	\$51,720,588	\$969	\$51,72
TOTAL EDUCATIONAL AND GENERAL PERSONNEL BY FUNCTION	\$10,000	\$542,470,433	\$10,111	\$548,948,987	\$10,951	\$606,19
<u>Educational and General Personnel by Occupational Activity</u>						
Edu and Gen - Executive/Administrative/Managerial	\$224	\$28,852,607	\$222	\$28,607,813	\$222	\$32,63
Edu and Gen - Faculty Full Time	\$2,346	\$209,606,434	\$2,379	\$212,520,325	\$2,840	\$233,94
Edu and Gen - Professional Non-Faculty	\$3,124	\$167,252,929	\$3,187	\$170,606,899	\$3,566	\$185,98
Edu and Gen - Secretarial/Clerical	\$1,077	\$37,328,280	\$1,075	\$37,274,563	\$1,075	\$42,04
Edu and Gen - Student and Graduate Assistant	\$1,982	\$57,546,496	\$1,999	\$58,048,249	\$1,999	\$64,44
Edu and Gen - Other Personnel	\$1,247	\$41,883,687	\$1,249	\$41,891,138	\$1,249	\$47,13
TOTAL EDU & GEN PERSONNEL BY OCCUPATIONAL ACTIVITY	\$10,000	\$542,470,433	\$10,111	\$548,948,987	\$10,951	\$606,19

FORM 17 RESTRICTED FUNDS

Postsecondary Education Budget Request Personnel

Institution: 502 - University Of Ala - Birmingham

Reporting Unit: Restricted Funds

Full Time Instructional Workload	Actual		Estimated		Requested	
<u>Education and General Personnel by Function</u>	FTE	Amount	FTE	Amount	FTE	Amou
Edu and Gen - Instruction	\$182	\$10,295,600	\$196	\$11,068,417	\$196	\$11,06
Edu and Gen - Research	\$2,008	\$113,530,243	\$2,159	\$122,052,129	\$2,159	\$122,05
Edu and Gen - Public Service	\$318	\$18,007,215	\$342	\$19,358,885	\$342	\$19,35
Edu and Gen - Academic Support	\$194	\$10,983,026	\$209	\$11,807,441	\$209	\$11,80
Edu and Gen - Student Services	\$5	\$254,599	\$5	\$273,709	\$5	\$27
TOTAL EDUCATIONAL AND GENERAL PERSONNEL BY FUNCTION	\$2,707	\$153,070,683	\$2,911	\$164,560,581	\$2,911	\$164,56

FORM 17 UNRESTRICTED FUNDS

Postsecondary Education Budget Request Personnel

Institution: 502 - University Of Ala - Birmingham

Reporting Unit: Unrestricted Funds

Full Time Instructional Workload	Actual		Estimated		Requested	
	FTE	Amount	FTE	Amount	FTE	Amount
Education and General Personnel by Function						
Edu and Gen - Instruction	\$2,885	\$154,027,738	\$2,848	\$152,045,493	\$3,232	\$178,20
Edu and Gen - Research	\$3	\$158,768	\$3	\$156,725	\$4	\$18
Edu and Gen - Public Service	\$348	\$18,606,505	\$344	\$18,367,050	\$390	\$21,51
Edu and Gen - Academic Support	\$1,401	\$74,784,705	\$1,383	\$73,822,270	\$1,569	\$86,53
Edu and Gen - Student Services	\$310	\$16,556,032	\$306	\$16,342,965	\$347	\$19,15
Edu and Gen - Institutional Support	\$1,365	\$72,871,123	\$1,347	\$71,933,315	\$1,529	\$84,31
Edu and Gen - Operation and Maintenance of Physical Plant	\$981	\$52,394,879	\$969	\$51,720,588	\$969	\$51,72
TOTAL EDUCATIONAL AND GENERAL PERSONNEL BY FUNCTION	\$7,293	\$389,399,750	\$7,200	\$384,388,406	\$8,040	\$441,63

FORM 14A CONDITION OF FUNDS

Postsecondary Education Budget Request Financial Summary Condition of Current Funds

Institution: 502 - University Of Ala - Birmingham

	Actual	Estimated	Requested	Increase (Decrease)
				Amount
Hospital - Balance Brought Forward at Beginning of Year	\$832,044,122	\$841,236,897	\$936,478,507	\$95,241,610
Revenues				
Hospital - Patient Service	\$4,952,671,256	\$5,625,567,913	\$5,625,567,913	\$0
Hospital - Allowances for Uncollectible Accounts	(\$3,574,763,526)	(\$4,064,596,354)	(\$4,064,596,354)	\$0
NET PATIENT SERVICES	\$1,377,907,730	\$1,560,971,559	\$1,560,971,559	
ETF Appropriation	\$32,638,497	\$32,867,066	\$46,157,526	\$13,290,460
Other Sources: Sales, Reimbursements and Investments	\$148,734,400	\$104,133,342	\$104,133,342	\$0
TOTAL HOSPITAL REVENUES	\$1,559,280,627	\$1,697,971,967	\$1,711,262,427	\$13,290,460

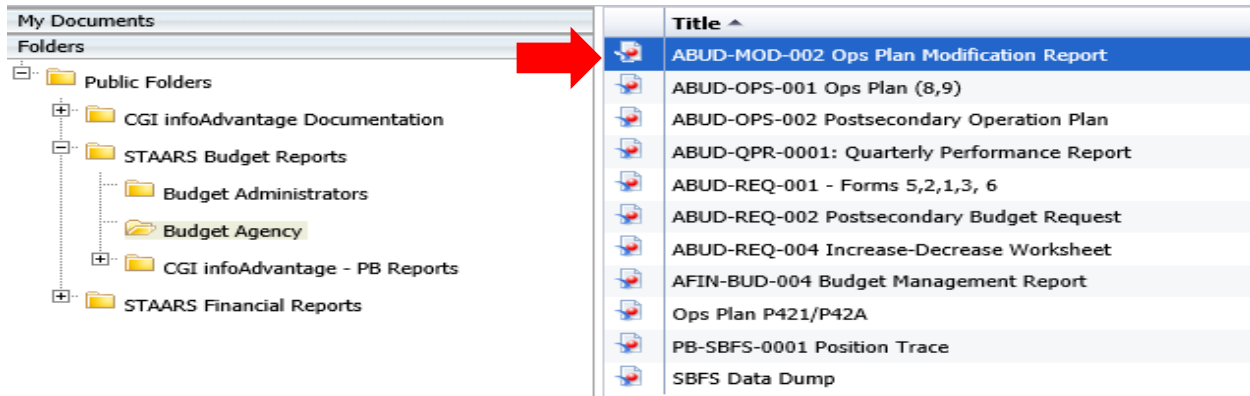
BUDGET REVISION PACKET

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

Revisions are required for postsecondary institutions if the ETF appropriations are reduced by proration or increased through a supplemental appropriation, etc.

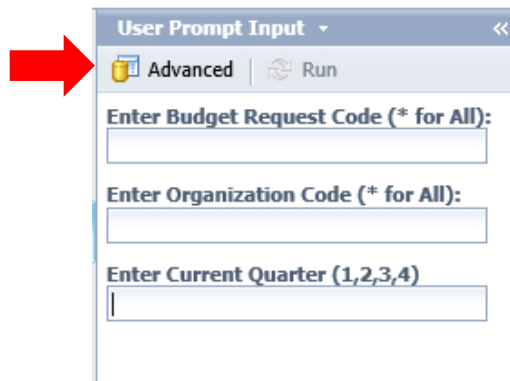
Follow Steps 1-6 in the Login Section above.

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



Step 8. Click **Advanced** in the **User Prompt Input** box.

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:

Prompts

Prompts Summary

- * Enter Budget Request Code (* for All): 040 OP REVISIO
- * Enter Organization Code (* for All): 040
- * Enter Current Quarter (1,2,3,4) 3

Enter Budget Request Code (* for All):

Type values here

Refresh Values

To see the content of the list, click the Refresh values button.

040 OP REVISION 5

* Required prompts

OK Cancel

Remove anything on the right side of the screen that is not related to your agency or the report that you are attempting to generate. You are looking for the revision by code that was entered into the STAARS Budgeting application. For this example, the Budget Request Code was 502 FY20 OP REV 1.

Step 10. To quickly locate the revision code, key the agency number with the wildcard (*) in the field with the binoculars.

Prompts

Prompts Summary

- * Enter Budget Request Code (* for All):
- * Enter Organization Code (* for All): 040
- * Enter Current Quarter (1,2,3,4) 3

Enter Budget Request Code (* for All):

Type values here

Refresh Values

Budget Request Code	Budget Requ
502 FORM 14 RES	UAB Form
502 FORM 14 AUX	UAB Form
502 FORM 17 UNR	UAB Form
502 FORM 17 RES	UAB Form
502 FORM 20	UAB Form
502 QPRT 2017	502 QPR
502 FORM 14 UNR	UAB Form
502 UAB CANCER CTR	UAB Cani
502 FY17 OP REV 1	UAB Schc

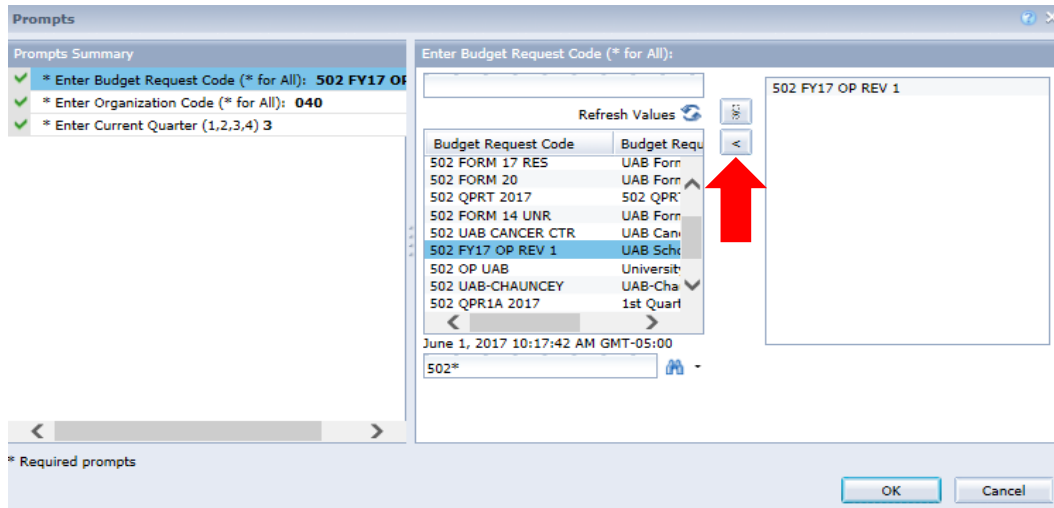
June 1, 2017 10:17:42 AM GMT-05:00

502*

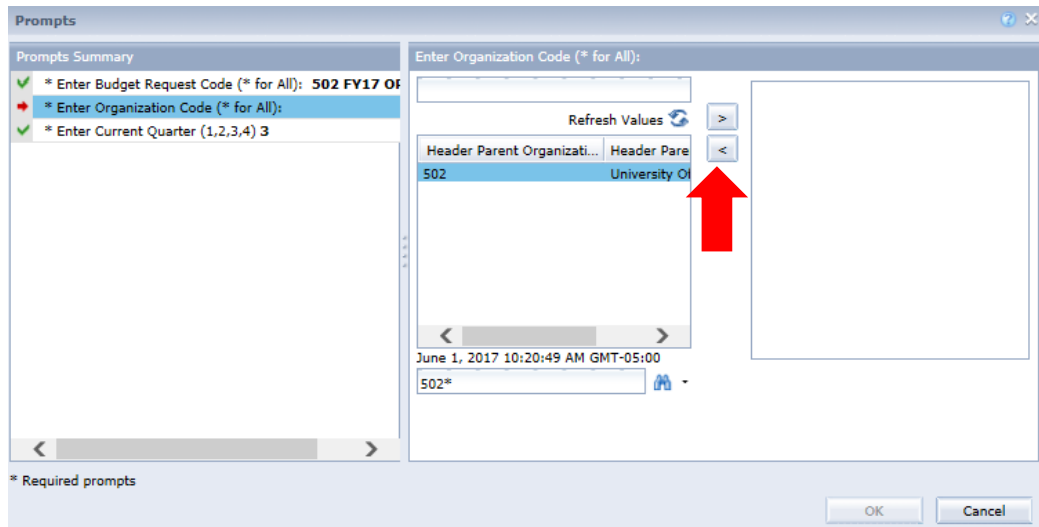
* Required prompts

OK Cancel

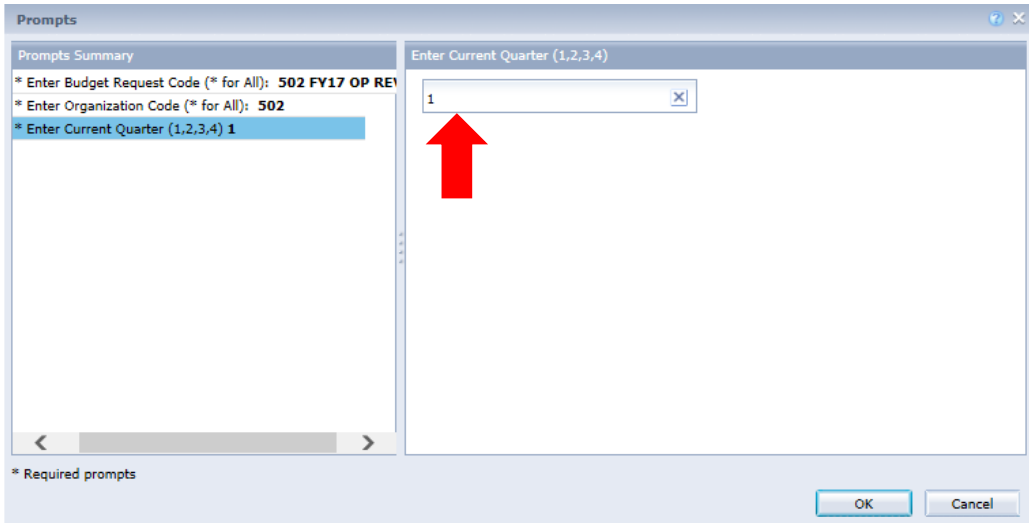
Step 11. Locate the revision, select it by double clicking or use the greater than arrow at the top to populate in the box to the right.



Step 12. Click on **Enter Organization Code** and use the binoculars at the bottom to search for your institution number. Remove any items that may already be in the box with the less than arrow.

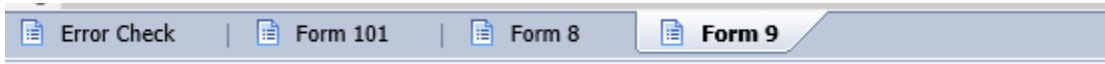


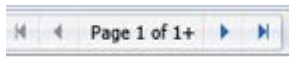
Step 13. The third prompt is for the current quarter. Enter the current quarter by number (1, 2, 3, and 4) in the box.



Step 14. When all prompts have been entered, click **OK** in the bottom to begin generating the report for the revision.

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



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

EXAMPLE – ERROR CHECK PAGE

Report ID: ABUD-MOD-002
Error Check
Run Date: |
Run Time:

State of Alabama
Operations Plan

Department: 502 - University Of Ala - Birmingham

First Quarter Second Quarter Third Quarter Fourth Quarter

Form 8

	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
Expenditures	29,729	0		
Source of Funds	29,729	0	0	0
Form 8 Expenditures match Source of Funds	Ok	Ok	Ok	Ok

Total

Form 8 vs Form 9 Costs

2017

Total for Object Category 0100	0
Form 9 Total Costs	0
Form 8 Costs Match Form 9 Costs	Ok

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.

If changes were made in Performance Budgeting, click the **Run** button in the **User Prompt Input** box.

Step 15. Click the **101 Form** tab. Below are examples of the 101 Form, the Agency Summary page and complete Form 8.

Report ID: ABUD-MOD-002 **State of Alabama**
 EBO Form 101
 Run Date:
 Run Time:

Department Number	502 - University Of Ala - Birmingham
Revision Number	502 FY17 OP REV 1
Date:	

Request is hereby made for a revision to the Fiscal Year ____ allotment and/or appropriation for the 502 - University Of Ala - Birmingham

Justification: For the Optometry Board in accordance with Article 2, Section 34-22-24.

Appropriation Revision

Fund:	0927
Appropriation Class:	151
Appropriation Unit:	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.	29,729
6. Transfer	
7. Proration	
8. Other	
9. Reversion Reappropriation	
10. Program Change	
Total 1-10 Above	29,729
Total Appropriation Revision	29,729

Report ID: ABUD-MOD-002
 EBO Form I
 Run Date:
 Run Time:

State of Alabama
 Operations Plan

Agency Summary					
Department	502 - University Of Ala - Birmingham				
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total
Number of Employees	0	0	0	0	
Expenditures by Major Object:					
1100-Grants and Benefits	29,729	0	0	0	29,729
Total Expenditures	29,729	0	0	0	29,729
Fund No. Source of Funds					
0927-101 - UAB College Of Optometry	29,729	0	0	0	29,729
Total Source of Funds	29,729	0	0	0	29,729

Report ID: ABUD-MOD-002
 EBO Form No.8
 Run Date:
 Run Time:


State of Alabama
 Operations Plan

Function					
Department	502 - University Of Ala - Birmingham				
Appropriation Class	151 - Support Of State Universities				
Function	0115 - Support of State Universities				
Appropriation Unit	0 - Default				
Objective:					
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total
Number of Employees					
Expenditures by Major Object:					
1100-Grants and Benefits	29,729	0	0	0	29,729
Total Expenditures	29,729	0	0	0	29,729
Fund No. Source of Funds					
0927-101 - UAB College Of Optometry	29,729	0	0	0	29,729
Total Source of Funds	29,729	0	0	0	29,729

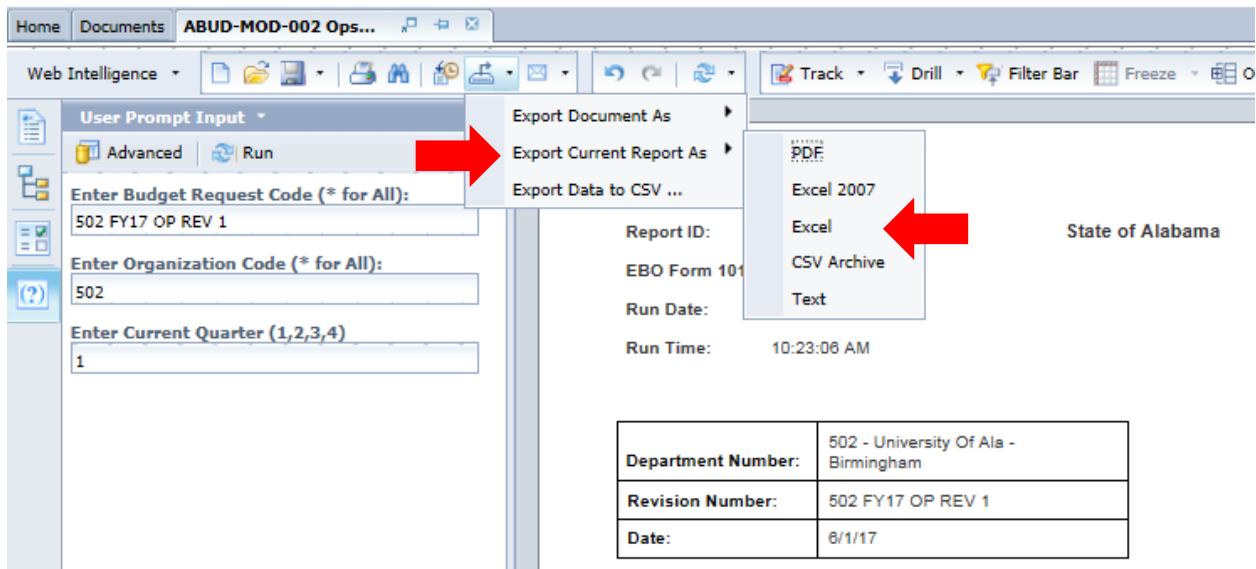
Step 16. You have now generated the institutions revision. Return to the Revision forms in the Performance Budgeting application to attach a copy of the report to the Document Management tab.

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, remain on the Form 101 tab and click **Export**. 

Click **Export Current Report As**, then select **Excel**.



The screenshot shows a software interface with a 'User Prompt Input' section on the left containing the following fields:

- Enter Budget Request Code (* for All): 502 FY17 OP REV 1
- Enter Organization Code (* for All): 502
- Enter Current Quarter (1,2,3,4): 1

On the right, there is a metadata section with the following information:

- Report ID:
- EBO Form 101
- Run Date:
- Run Time: 10:23:06 AM

Below the metadata is a table with the following data:

Department Number:	502 - University Of Ala - Birmingham
Revision Number:	502 FY17 OP REV 1
Date:	6/1/17

The interface also features a 'User Prompt Input' menu with options: 'Export Document As', 'Export Current Report As', and 'Export Data to CSV ...'. A red arrow points to 'Export Current Report As', which has opened a sub-menu with options: 'Excel 2007', 'Excel', 'CSV Archive', and 'Text'. A second red arrow points to the 'Excel' option in this sub-menu.

Step 2. In Excel, you will enter the types of adjustments to the form.

Supplemental appropriation, transfer from another agency, Proration, etc.

23	Appropriation Revision	
24	Fund:	0927
25	Appropriation Class:	151
26	Appropriation Unit:	0
27	1. Supplemental appropriation from State General Fund Act No.	
28	2. Supplemental appropriation from ETF Act No.	
29	3. Departmental Receipts	
30	4. Federal Receipts	
31	5. Special Act No.	29,729
32	6. Transfer	
33	7. Proration	
34	8. Other	
35	9. Reversion Reappropriation	
36	10. Program Change	
37	Total 1-10 Above	29,729
38	Total Appropriation Revision	29,729

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

Step 4. In the Total Appropriation Revision row, sum each column to capture any amounts keyed in the Excel form.

23	Appropriation Revision	
24	Fund:	0927
25	Appropriation Class:	151
26	Appropriation Unit:	0
27	1. Supplemental appropriation from State General Fund Act No.	
28	2. Supplemental appropriation from ETF Act No.	
29	3. Departmental Receipts	
30	4. Federal Receipts	
31	5. Special Act No.	29,729
32	6. Transfer	
33	7. Proration	
34	8. Other	
35	9. Reversion Reappropriation	
36	10. Program Change	
37	Total 1-10 Above	=SUM(C27:C36)
38	Total Appropriation Revision	29,729

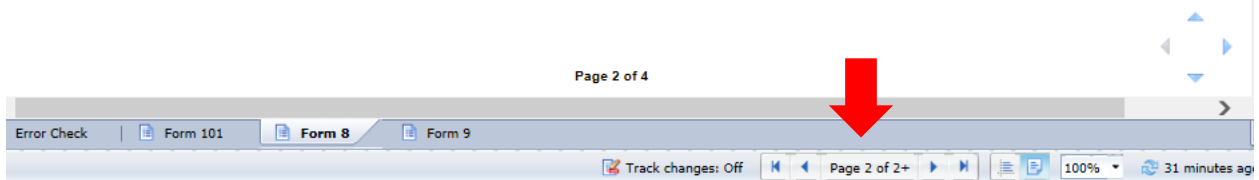
Step 5. Once complete, save the Excel spreadsheet using the following format:

EXAMPLE: FY 502 Revision 1 Form 101**


- Fiscal Year: **FY****
- Agency Number: **502**
- Revision Number: **Revision 1**
- Form Name: **Form 101**

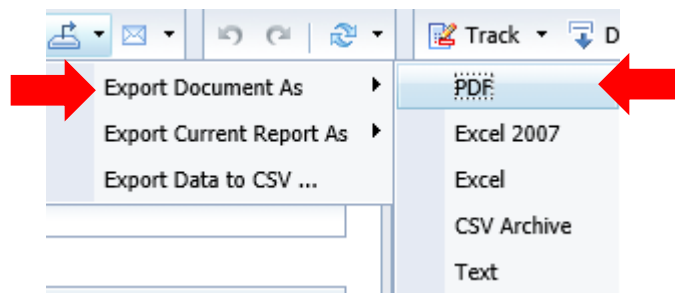
Step 6. Click the arrows to move between the pages to view.

Appropriation Class Summary					
Department	502 - University Of Ala - Birmingham				
Appropriation Class	151 - Support Of State Universities				
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Total
Expenditures by Major Object:					
1100-Grants and Benefits	29,729	0	0	0	29,729
Total Expenditures	29,729	0	0	0	29,729
Fund No. Source of Funds					
0927-101 - UAB College Of Optometry	29,729	0	0	0	29,729
Total Source of Funds	29,729	0	0	0	29,729



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: FY20 502 Revision 1

- Fiscal Year: **FY 23**
- Agency Number: **502**
- Revision Number: **Revision 1**

Step 9. Return to STAARS Budgeting to attach the report to the **Document Management** tab.