



## Budget Formulation and Management (BFM)

### End User Guide – Quarterly Performance Report (QPR) Forms



State of Alabama

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## Budget Form Instructions

### 1. Quarterly Performance Report (QPR) Forms

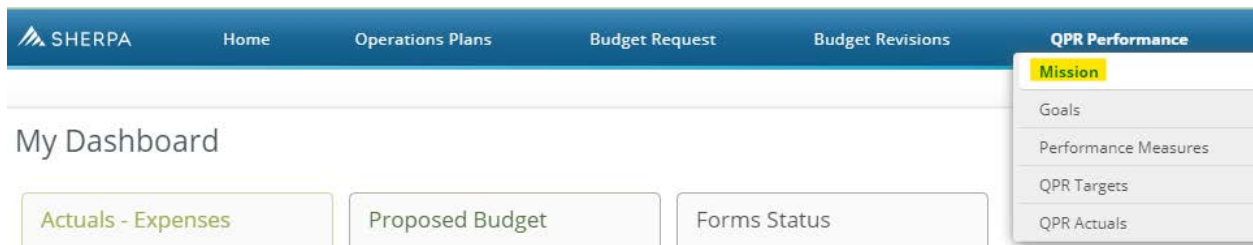
The Quarterly Performance Report (QPR) is used by state agencies as a tool for planning and documenting performance. Each state agency/department is required to submit a performance report. All QPR forms can be found in BFM under the 'QPR Performance' Menu header.

#### 1.1. Mission, Goals, and Performance Measure Updates

This section covers updating mission and vision, goals, and performance measures. Updating QPR targets and actuals is covered in the following section.

##### Mission and Vision

1.1.1. After logging into BFM, begin by hovering over 'QPR Performance' on the header menu, and then select 'Mission'.



1.1.2. On the 'List Page', you will see the Mission forms to which you have access based on your security.  
1.1.3. Click on 'Header' on the appropriate row (can use Quick Search bar to help find).

##### Budget Form Header

Instance ID	Form Definition	Definition Name	Name	Department
2215	6100	Mission	Alcoholic Beverage Control Bd	002

Stage Code:\*  Department:   
Mission: Alcoholic Beverage Control Bd

Header

Name:\*  Save

Mission:

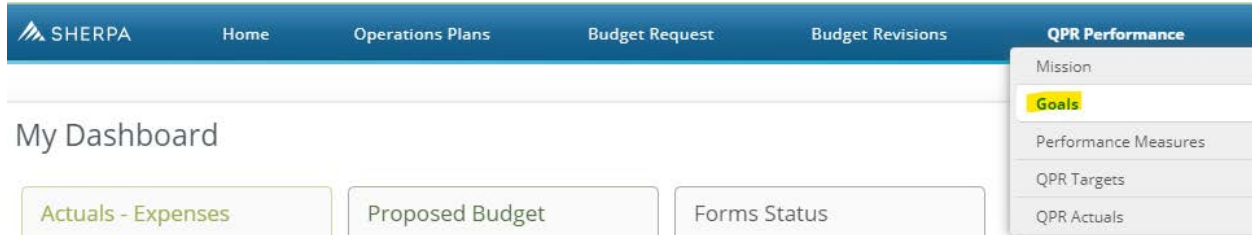
Vision:

1.1.4. On the Budget Form Header, users can update the Mission and Vision as needed.

1.1.5. Click 'Save' to save changes.

### Goals – Updating Existing Goals

1.1.6. After logging into BFM, begin by hovering over 'QPR Performance' on the header menu, and then select 'Goals'.



1.1.7. On the 'List Page', you will see the Goal forms to which you have access based on your security.

Goals

+ Add New Search

ID	Name	Stage Code	Stage Name	Dept	Goals	Rows	Last Update	Last User	Workflow	Actions
1561	# Farmers providing LFS food-001	6000	Goals	001	001-GOAL-069	0	1/22/2024		Submit	Header
1552	Ag Promotion Certify Farmers-001	6000	Goals	001	001-GOAL-060	0	1/22/2024		Submit	Header
1553	Ag Promotion GAP farmers-001	6000	Goals	001	001-GOAL-061	0	1/22/2024		Submit	Header

1.1.8. Click on 'Header' on the appropriate row (can use Quick Search bar to help find).

1.1.9. On the Budget Form Header, users can update the Name and Description as needed.

Budget Form Header

Mention History | Mention | Submit | Configuration | X Close

Instance ID	Form Definition	Definition Name	Name	Department:
1553	6000	Goals	Ag Promotion GAP farmers-001	001

Stage Code:\*  Department:   
 Goals Agriculture & Industries

Header

Name:\*    
 Description:  Active?:

Legacy Code:

1.1.10. Click 'Save' to save changes.

### Goals – Creating New Goals

1.1.11. To add a new goal, click on 'Add New' in the header row.

Goals

+ Add New

ID	Name	Stage Code	Stage Name	Dept	Goals
1561	# Farmers providing LFS food-001	6000	Goals	001	001-GOAL-069
1552	Ag Promotion Certify Farmers-001	6000	Goals	001	001-GOAL-060

1.1.12. Select '6000 – Goals' for the Stage (only option), use the magnifying glass to select the appropriate Department, and add a Goal name (you can edit this later if needed).

1.1.13. Click 'Save'.

1.1.14. Add a Description and populate Legacy Code if needed, then click 'Save'.

### Performance Measures – Updating Existing Performance Measures

1.1.15. After logging into BFM, begin by hovering over 'QPR Performance' on the header menu, and then select 'Performance Measures'.

ID	Name	Stage Code	Stage Name	Depar	Rows	Last Update				
5918	Agriculture & Industries	6401	Initial	001	375	4/12/2024	brvan.rpedi@she	Submit	Header	Detail

1.1.16. On the 'List Page', you will see the Performance Measure forms to which you have access based on your security.

1.1.17. Click on 'Header' on the appropriate row (can use Quick Search bar to help find).

1.1.18. On the Budget Form Header, updates can be made to name, description, unit, Active flag, and the

associated goal (click on magnifying glass to search).

### Budget Form Header

Mention History    Mention    Submit    Close

Instance ID	Form Definition	Definition Name	Name	Department	Goals
3385	6200	Performance Measures	Feed Monensin	001	001-GOAL-023

Stage Code:\*  Department:   
 Performance Measures    Agriculture & Industries

Header

Name:\*  Save

Description:

Unit:

Active?:

Goal:     
 001-GOAL-023-Pesticide Residue Lab Other

**Note:** if the performance measure is no longer used or needed, uncheck the 'Active?' flag. The performance measure can also be reused (change the name, unit, etc.).

1.1.19. Click 'Save' to save changes.

### Performance Measures – Creating New Performance Measures

1.1.20. To add a new Performance Measure, click on 'Add New' in the header row.

### Performance Measures

ID	Name	Stage Code	Stage Name	Department
2519	Agriculture Compliance Fertilizer Samples Collected	6200	Performance Measures	001
2520	Agriculture Compliance Lime Samples Collected	6200	Performance Measures	001

1.1.21. Select '6200 – Performance Measures' for Stage (only option). Use the magnifying glass to select the appropriate Department, and use the magnifying glass (and Search box may be helpful) to search for the associated Goal. Add a Name, and then click 'Save'.

Create a new Budget Form - 6200

Stage:\*

Department:     
 Corrections

Goals:     
 Optimize inmate healthcare spending to limit ann

Name:\*

1.1.22. On the Budget Form Header, enter a Description and Unit. You can also update the Active flag

and associated goal if needed.

### Budget Form Header

Instance ID	Form Definition	Definition Name	Name	Department	Goals
3385	6200	Performance Measures	Feed Monensin	001	001-GOAL-023

Stage Code:\*  Department:   
 Performance Measures Agriculture & Industries

Header

Name:\*    
 Description:   
 Unit:   
 Active?:

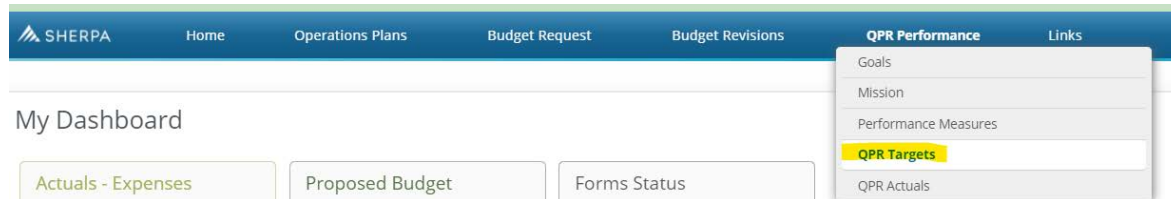
Goal:    
 001-GOAL-023-Pesticide Residue Lab Other

1.1.23. Click 'Save' to save changes.

## 1.2. QPR Targets and QPR Actuals Updates

### QPR Targets

1.2.1. Hover over 'QPR Performance' on the header menu, and then select 'QPR Targets'.



1.2.2. On the 'List Page', you will see the QPR Target forms to which you have access based on your security.

1.2.3. Click on 'Detail' in the row you would like to edit.

### QPR Targets

\* Create Budget Forms

ID	Name	Stage Code	Stage Name	Depar	Rows	Last Update	Last User	Workflow	Actions
5918	Agriculture & Industries	6401	Initial	001	325	4/12/2024	bryan.reed@she	Submit	Header Detail
5986	Alcoholic Beverage Control Bd	6401	Initial	002	15	4/12/2024	bryan.reed@she	Submit	Header Detail
5998	Banking	6401	Initial	003	15	4/12/2024	bryan.reed@she	Submit	Header <b>Detail</b>

1.2.4. In the detail screen, double-click on any line to update the editable columns.

Row	Audit Trail	Performance Measures	PM Name	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Annual Target	Description
1		003-001	To Examine Banks	<input type="text" value="11"/>	<input type="text" value="7"/>	<input type="text" value="9"/>	<input type="text" value="9"/>	<input type="text" value="36"/>	
2	<input type="button" value="Q"/>	003-002	Maintain Fund Balance	0	0	0	0	25	
3	<input type="button" value="Q"/>	003-003	To Address Consumer Complaints Within 30 Days	30	30	30	30	30	

Records per page: 50    Records: 1 - 3 of 3 - Pages: 1

1.2.5. Click **Save All** (at the bottom of the grid) to save changes.

1.2.6. To add a new performance measure row, click 'Add New' in the header. Use the magnifying glass to select the appropriate Performance Measure, add a Description, and add quarter and annual targets. Click Save.

The image shows two side-by-side screenshots from a software application. The left screenshot, titled "QPR Targets", displays a table with columns for ID, Form, and Department. Below the table is a toolbar with buttons for "Close", "Add New", "Copy", "Export", and "Import". A second table below the toolbar lists performance measures with columns for Row, Audit Trail, Performance Measures, and PM Name. The right screenshot, titled "Budget Form Entry - Add New Line", shows a form for adding a new line item. It includes a "Close" button at the top, a header for "Form ID" (5998) and "Form Definition" (6400), and a section for selecting a "Department" (003) and "Performance Measures" (003-003). Below this is a "Description:" field and five target input fields: "Quarter 1 Target: 100", "Quarter 2 Target: 100", "Quarter 3 Target: 100", "Quarter 4 Target: 100", and "Annual Target: 400". "Save" and "Cancel" buttons are also present.

ID	Form	Department:
5998	6400	003 - Banking

Row	Audit Trail	Performance Measures	PM Name
1	🔍	003-001	To Examine Banks
2	🔍	003-002	Maintain Fund Bal
3	🔍	003-003	To Address Consum Complaints Within Days

Records per page: 50 Advanced Search

Close

Form ID: 5998 Form Definition: 6400

Department: 003 Performance Measures: 003-003

Banking To Address Consum

Description:

Quarter 1 Target: 100

Quarter 2 Target: 100

Quarter 3 Target: 100

Quarter 4 Target: 100

Annual Target: 400

Save Cancel



## QPR Actuals

1.2.7. Hover over 'QPR Performance' on the header menu, and then select 'QPR Actuals'.

1.2.8. On the 'List Page', you will see the QPR Target Actuals forms to which you have access based on your security.

1.2.9. Click on 'Detail' in the row you would like to edit.

1.2.10. In the detail screen, double-click on any line to update the editable columns.

QPR Actuals

ID	Form	Department	Form Name
6167	6700	003 - Banking	QPR Actuals

Close Save All Cancel All Add New Copy Export Import Refresh Search

Row	Audit Trail	Performance Measure	PM Name	Quarter 1 Target	Quarter 1 Actuals	Quarter 2 Target	Quarter 2 Actuals	Quarter 3 Target	Quarter 3 Actuals	Quarter 4 Target	Quarter 4 Actuals	Annual Target	Annual Actuals	Description
1		003-001	To Examine Banks	11	6	7	0	9	0	9	0	36	0	
2		003-002	Maintain Fund Balance	0	0	0	0	0	0	0	0	25	0	
3		003-003	To Address Consumer Complaints Within 30 Days	30	28	30	0	30	0	30	0	30	0	

Records per page: 50 Advanced Search Save All Cancel All Records: 1 - 3 of 3 - Pages: 156 - 44 - 1 - 30 - 30

**Notes:** Quarters in the past are not editable. Target numbers read in from the QPR Target forms.

1.2.11. To add a new performance measure row, click 'Add New' in the header. Use the magnifying glass to select the appropriate Performance Measure, add a Description, and add quarter and annual actuals. Click Save.

QPR Actuals

ID	Form	Department
6167	6700	003 - Banking

Close Add New Copy Export Import

Row	Audit Trail	Performance Measure	PM Name
1		003-001	To Examine Banks
2		003-002	Maintain Fund Balance
3		003-003	To Address Consumer Complaints Within 30 Days

Records per page: 50 Advanced Search

### Budget Form Entry - Add New Line

Close

Form ID	Form Definition
6167	6700

Department: 003 Banking Performance Measures: 003-003 To Address Consum Save Cancel

Description:

Quarter 1 Actuals: 100  
Quarter 2 Actuals: 100  
Quarter 3 Actuals: 100  
Quarter 4 Actuals: 100  
Annual Actuals: 400

1.2.12. For Quarter 4 Actuals, you are required to answer the two questions on the Header Tab.

### Budget Form Header

## 1.3. Updating form data using Export/Import Excel functionality

1.3.1. To update form data using Excel, click on the Export button in the budget form header row, and open the resulting Excel file.

ID	Form	Department:	Form Name
6167	6700	003 - Banking	QPR Actuals

Row	Audit Trail	Performan	PM Name	Quarter 1 Target	Quarter 1 Actuals	Quarter 2 Target
1	Q	003-001	To Examine Banks	11	6	7
2	Q	003-002	Maintain Fund Balance	0	0	0
3	Q	003-003	To Address Consumer Complaints Within 30 Days	30	28	30

1.3.2. The Export will download an Excel file with the same information as what is in the Details grid.

1.3.3. Once in the Excel file, make needed updates, including adding new rows.

1.3.4. Once complete, Save the Excel file as a new file.

1.3.5. To load the changes into Excel, click on the Import button.

1.3.6. Click the 'Browse' button to find and select the updated file, then click 'Load File'.

Budget Form Import

X Close ✓ Validation Results

Browse C:\fakepath\Book1.xlsx

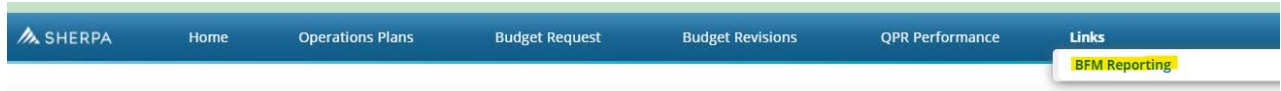
Load File

1.3.7. The system will compare records on the Excel file with what is already on the form, validate for errors and invalid codes, and load the new amounts/lines into the form.

**Note:** If the screen loads with red, that means there were errors on the import and no lines were loaded. Click on the Validation Results button to see the errors and corresponding row number. Correct the errors on the Excel and reimport file.

## 1.4. QPR Report

1.4.1. To access the QPR report, navigate to Links > BFM Reporting.



1.4.2. In the Reporting folder view, navigate to the '3 Department Reports' folder, then '3.4 QPRs'.

The screenshot shows a folder view in SHERPA. The left sidebar shows 'Public Folders' expanded. The main area displays a table of folders:

<input type="checkbox"/>	Title	Favorites	Type
<input type="checkbox"/>	0 Administrative Reports		Folder
<input type="checkbox"/>	1 Admin		Folder
<input type="checkbox"/>	2 Budget Office		Folder
<input type="checkbox"/>	3 Department Reports		Folder
<input type="checkbox"/>	Auditing		Folder
<input type="checkbox"/>	Data Federation		Folder

1.4.3. Click on the **Quarterly Performance Report**. A pop up will prompt you to select Organization (Department).

Prompts

Search

Organization

Search or enter value(s) manually

Form Header Org	Form Header Org Name
<input type="radio"/> 001	Agriculture & Industries
<input type="radio"/> 002	Alcoholic Beverage Control Bd
<input type="radio"/> 003	Banking
<input type="radio"/> 004	Conservation & Nat Resources
<input type="radio"/> 005	Corrections
<input type="radio"/> 006	Administrative Office Of Court
<input type="radio"/> 007	Commerce
<input type="radio"/> 008	Education
<input type="radio"/> 009	Forestry Commission
<input type="radio"/> 010	Finance
<input type="radio"/> 011	Public Health
<input type="radio"/> 012	Transportation
<input type="radio"/> 013	Labor

Reset All Run Cancel

1.4.4. Scroll to select the appropriate Organization (you can also use the Search bar) and then click 'Run'.

1.4.5. The report includes the Mission, Vision, goals, and performance measure targets and actuals.

**SHERPA** State of Alabama  
Quarterly Performance Report

**Department:** 003 - Banking  
**Mission:** To charter, license, and regulate Alabama banks and other financial services providers in an efficient and effective manner that will foster stability, instill public confidence, and promote economic development in a competitive environment.  
**Vision:** To ensure a financial services environment that is stable, safe, and growing by consistently providing quality regulation which protects the interests of depositors, customers, sha

**Annual Goals**

003-GOAL-001 To attempt to prevent bank failures by examining banks within the legally required timeframe  
 003-GOAL-002 Maintain adequate reserves to continue operations in the event of a substantial(more than 15%) loss of revenue  
 003-GOAL-003 Address consumer issues within 30 days  
 003-GOAL-004

**003-001 - To examine banks**

PM Goal	Unit	Target Q1	Actuals Q1	Target Q2	Actuals Q2	Target Q3	Actuals Q3	Target Q4	Actuals Q4	Annual Target	Annual Actuals
001	Number of Banks to be Examined	11	6	7	0	9	0	9	0	36	0

**003-002 - Maintain fund balance**

PM Goal	Unit	Target Q1	Actuals Q1	Target Q2	Actuals Q2	Target Q3	Actuals Q3	Target Q4	Actuals Q4	Annual Target	Annual Actuals
002	Fund Balance/total Expenses	0	0	0	0	0	0	0	0	25	0

**003-003 - To address consumer complaints within 30 days**

PM Goal	Unit	Target Q1	Actuals Q1	Target Q2	Actuals Q2	Target Q3	Actuals Q3	Target Q4	Actuals Q4	Annual Target	Annual Actuals
003	Response Time (Days)	30	28	30	0	30	0	30	0	30	0

Quarterly Performance Report Go To 1 of 1+ Refresh Date/Time: 4/18/24 @ 11:57:06 AM