

STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)

QUARTERLY PERFORMANCE REPORTING

A Guide for ALL Agencies

Welcome to STAARS Budgeting! STAARS Budgeting is the system of record for budgeting for the State of Alabama. The Quarterly Performance Reporting (QPR) application is to be used by state agencies as a tool for planning and documenting performance. As directed in Section 41-19-11 of the Budget Management Act (Code of Alabama 1975), each state agency/department is required to submit a performance report. It is required that each state agency input a minimum of one goal and one performance objective. These requirements will be accomplished through Performance Budgeting. This guide will walk users through the process of inputting annual and quarterly data.

To Access STAARS Budgeting on the Internet:

Access to two different areas of STAARS will be required. The QPR data will be completed in the STAARS Performance Budgeting application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the QPR report generated from the application. Please contact STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov for login credentials.

To create the Quarterly and Annual Performance report, access will be needed as follows:

Performance Budgeting (PB) <https://budget.staars.alabama.gov>

Reports in infoAdvantage <https://infoadv.staars.alabama.gov/BOE/BI>

Mission, Vision, Goals and Performance Measures

Inputting initial data (Mission-Vision-Goals-Objective-Targets) into QPR reports is required for each new fiscal year.

The EBO recommends reviewing the mission, vision, goals and performance measures for accuracy. If the department decides to make changes to either the mission, vision, goals, or performance measures (targets) make notes and contact your budget analyst.

I. MISSION/VISION

Step 1. Under the **Reference Data** category, select **Performance Budgeting**.

CGI Advantage

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

Site Map > Advantage Performance Budgeting

Advantage Performance Budgeting

Categories

Reference Data - This contains links to all the reference data in the system.

SBFS - This contains links to all the SBFS 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.

[Workflow](#) - The following are Workflow-specific links.

[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.

Utilities - Links to utilities.

Budget Tasks - This contains links to independent Views.

[Import / Export](#) - This contains links to all Import / Export data.

[Rollover](#) - This contains links to rollover.

[ECM](#) - This contains links to all ECM Integration data.

Step 2. From the **Performance Budgeting** screen, select **Performance Missions**.

CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting

Performance Budgeting

Pages

[Performance Missions](#)

[Performance Goals](#)

[Performance Objectives](#)

[Performance SubObjectives](#)

[Annual Performance Goals](#)

[Performance Measure Type Maintenance](#)

[Performance Plans](#)

The **Performance Missions Maintenance** screen will appear.

Step 3. In the **Code** field enter the **Department 3-digit number** (include the asterisk). Click **Search**.

CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting > Pe

Performance Missions Maintenance

Code: Name:

Display

Item Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#)

<input type="checkbox"/>	Code	Name
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Step 4. Select the code for your department to review the information in the performance hierarchy. Click **VIEW** or **EDIT** (for changes).

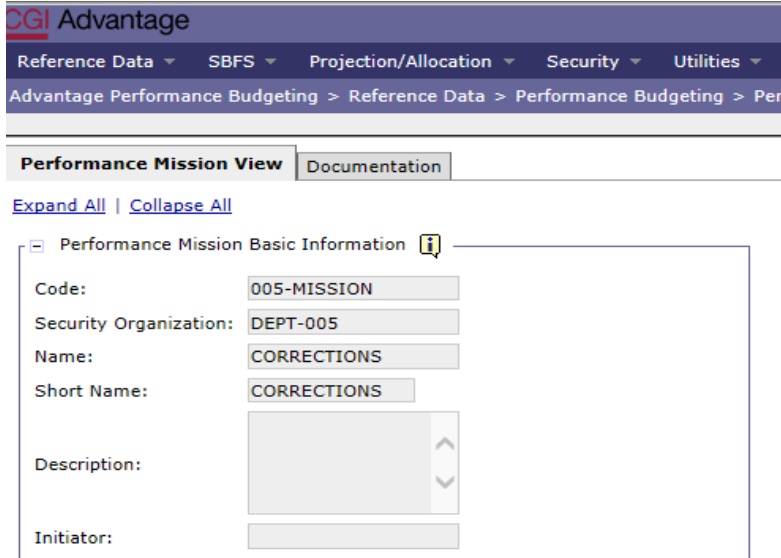
Performance Missions Maintenance

Code: Name:

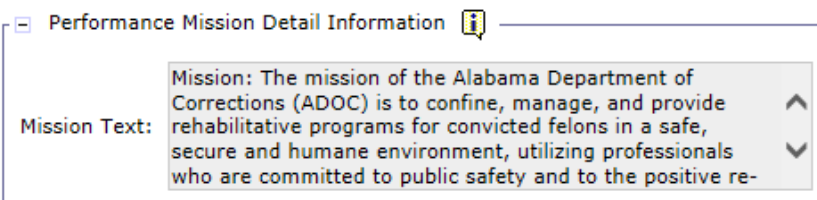
Display


<input checked="" type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	005-MISSION	

Step 5. Click **VIEW** or **EDIT** to verify the **security organization, name** and **short name**.



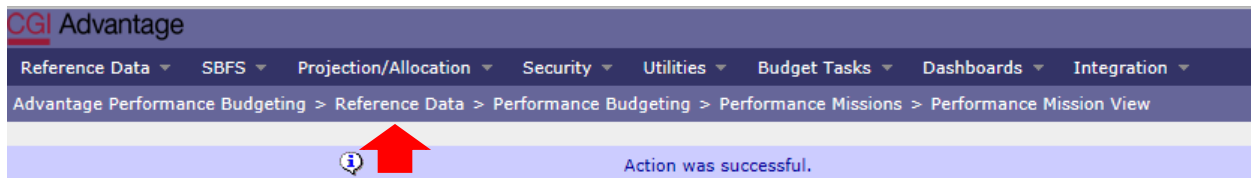
Step 6. Under the **Performance Mission Detail Information** section, review the Mission of the department and make changes if necessary.



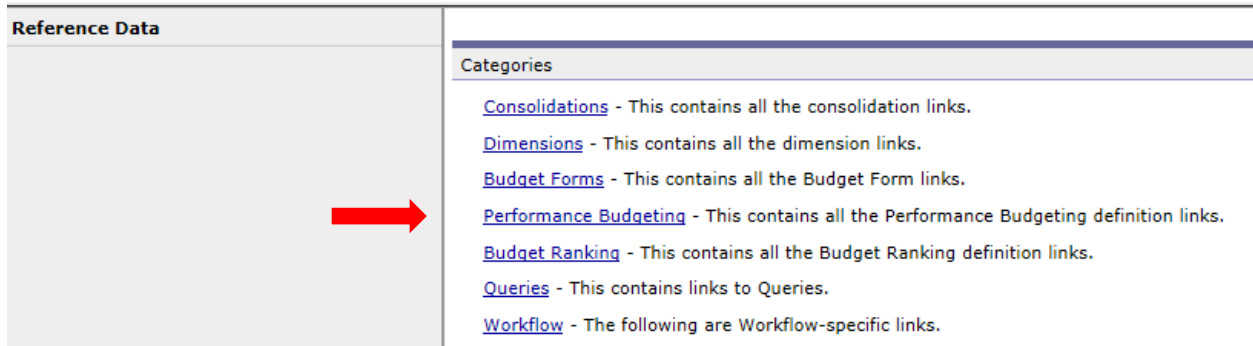
Step 7. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

II. GOALS

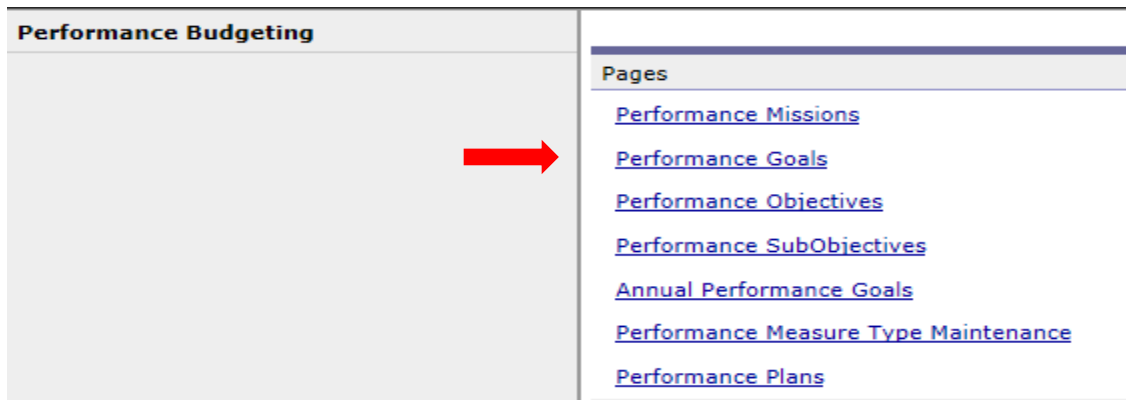
Step 8. Using the thread (or bread crumb trail), return to the **Reference Data** screen.



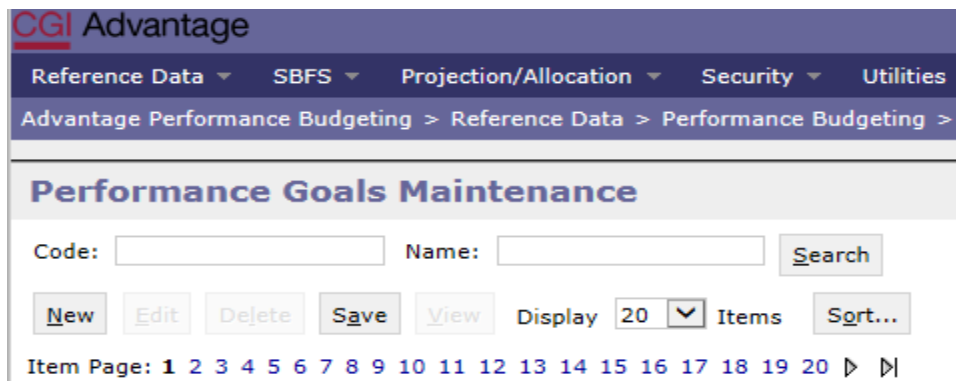
Step 9. Select **Performance Budgeting** under the Categories section. The **Performance Budgeting** Screen will appear.



Step 9. From the **Performance Budgeting** screen, select **Performance Goals**.



The **Performance Goals Maintenance** screen will appear.



Step 10. In the **Code** field enter the **3-digit Department number** (include the asterisk). Click **Search**.

Performance Goals Maintenance

Code: Name:

Display

Step 11. Select the code for your department to review the information in the performance hierarchy. Click **VIEW** or **EDIT** (for changes).

Performance Goals Maintenance

Code: Name:

Display

<input checked="" type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	005-GOAL-001	Optimize inmate healthcare spending to limit annual increase

Step 12. Click **VIEW** to verify the **security organization, name, short name** and **description**. If you need to make changes to the Goal, contact EBO.

Performance Goal View | Performance Allocations | Milestones | Documentation

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

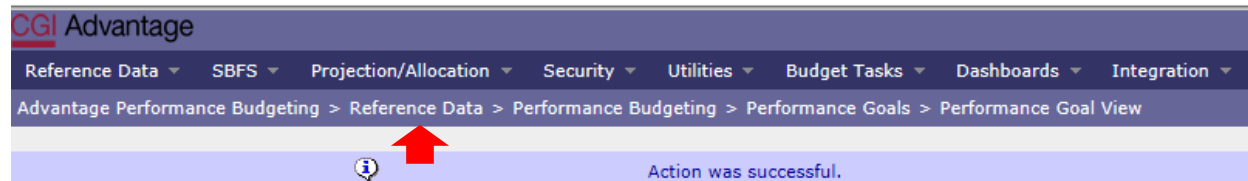
Basic Information

* Code:	<input type="text" value="005-GOAL-001"/>
* <u>Security Organization</u> :	<input type="text" value="DEPT-005"/>
Name:	<input type="text" value="Optimize inmate health"/>
Short Name:	<input type="text" value="Optimize inmate"/>
Description:	<input type="text" value="Optimize inmate healthcare spending to limit annual increases to 6% through 2016."/>
Initiator:	<input type="text"/>

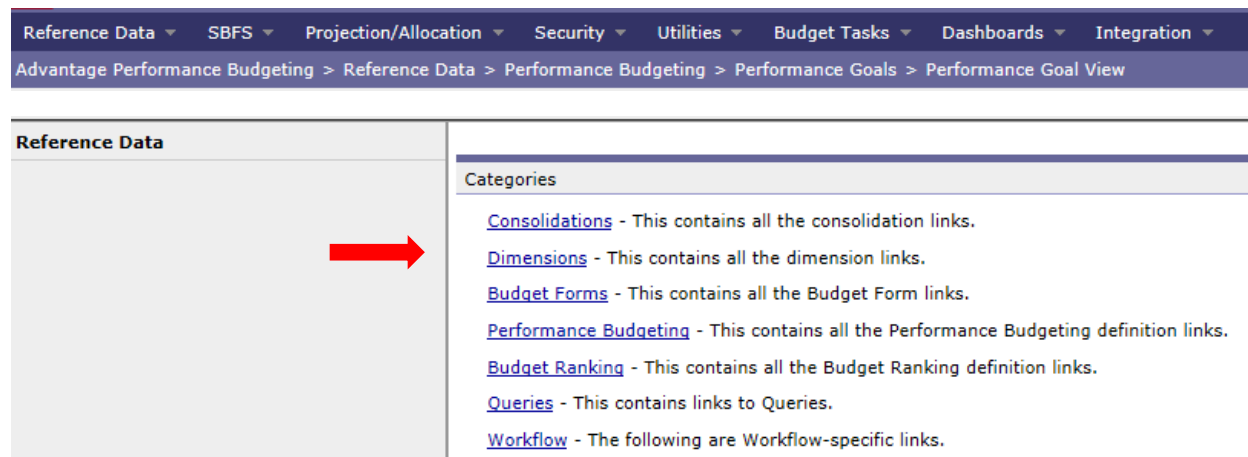
Step 13. Once complete, click **Save** at the top of the page. The **Action was Successful** message will appear.

III. PERFORMANCE PLANS

Step 14. Using the thread (or bread crumb trail), return to the **Reference Data** screen.

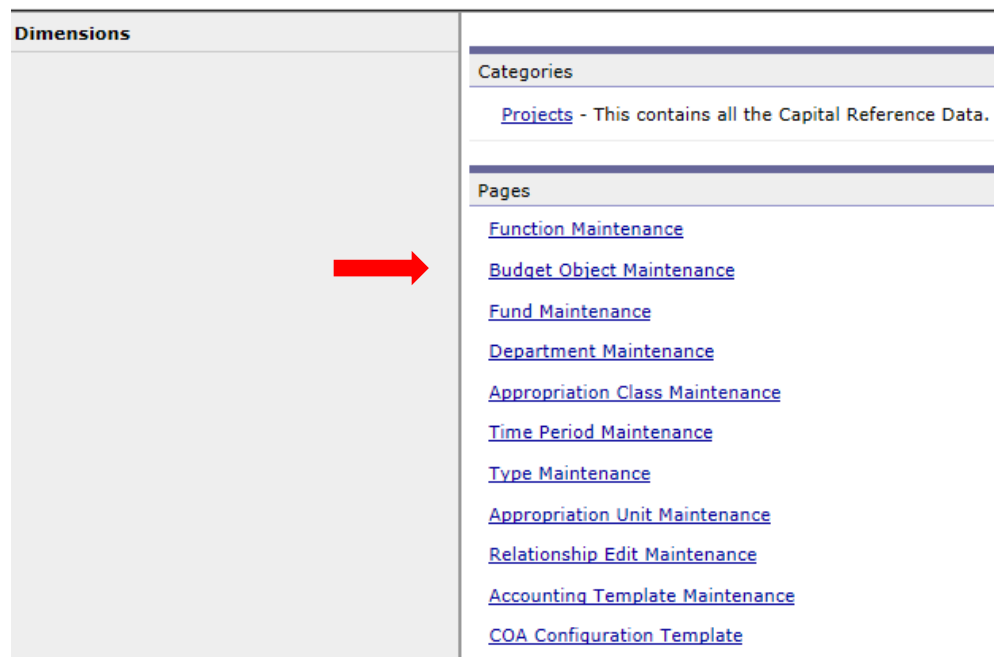


Step 15. Select **Dimensions** under the Categories section.



The **Dimensions** screen will appear.

Step 16. From the **Dimensions** screen, select **Budget Object Maintenance**.



The **Budget Object Maintenance** screen will appear.

Budget Object Maintenance

Code: 005* Name: Short Name: Element Type: Object Type: Performance Measure Search

Usage: Postable: Parent Budget Object: Itemization Type:

New Edit Delete Save Move View Move with children Sort by User-Defined Order Display 20 Items Sort...

Step 17. In the **Budget Object Maintenance** screen, enter the department code (include the asterisk). Also, use the drop down arrow in the **Object Type** box to select **Performance Measure**. Click **Search**.

Search

The **Performance Measure(s)** from prior year will be listed.

Budget Object Maintenance

Code: 005* Name: Short Name: Element Type: Object Type: Performance Measure Search

Usage: Postable: Parent Budget Object: Itemization Type:

New Edit Delete Save Move View Move with children Sort by User-Defined Order Display 20 Items Sort...

Code	Name	Short Name	Element Type	Object Type
005-01	Annual Inmate Health Services Cost Will Not Exceed 99.43 Mil	Annual inmate h	Object	Performance Measure

Step 18. Select the code for your department to review the information in the performance hierarchy. Click **VIEW** or **EDIT** (for changes).

Budget Object Maintenance

Code: 005* Name: Short Name: Element Type: Object Type: Performance Measure Search


Usage: Postable: Parent Budget Object: Itemization Type:

New Edit Delete Save Move View Move with children Sort by User-Defined Order Display 20 Items Sort...

Code	Name	Short Name	Element Type	Object Type
005-01	Annual Inmate Health Services Cost Will Not Exceed 99.43 Mil	Annual inmate h	Object	Performance Measure

Step 19. The screen will appear with details of the performance measure. Review and edit the name, short name, and description. **DO NOT CHANGE the Security Organization. Contact EBO.**

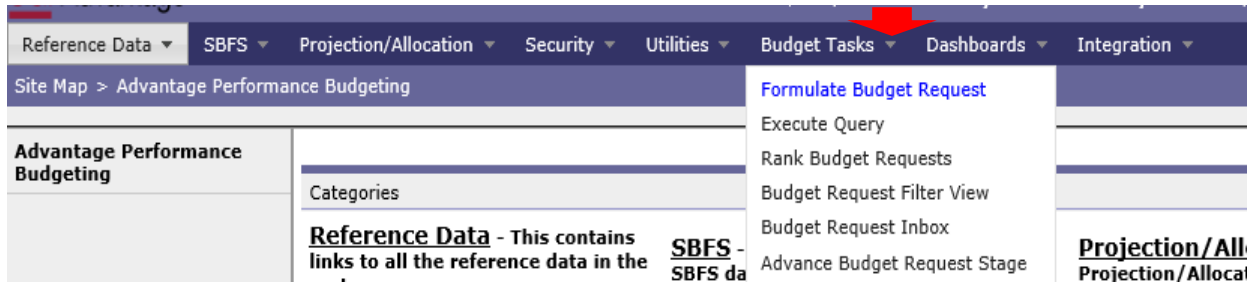
If additional performance measures need to be added, contact the Budget Office. We will walk you through the process of creating new goals and/or measures.

Step 20. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

Quarterly Performance Report (Targets)

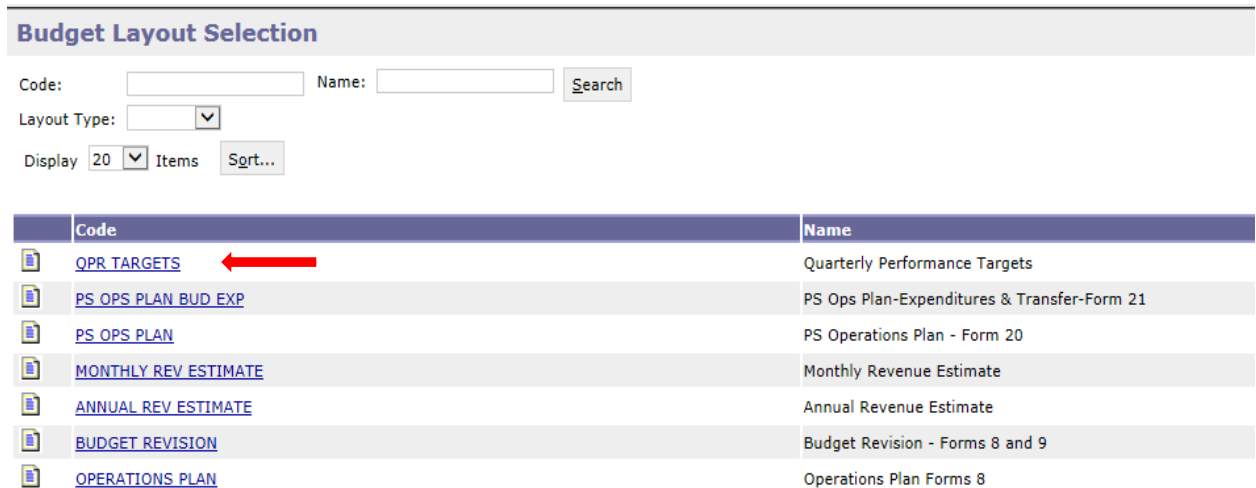
IV. TARGETS

Step 1. Using the tool bar, click on **Budget Task**, then click **Formulate Budget Request** from the dropdown menu.

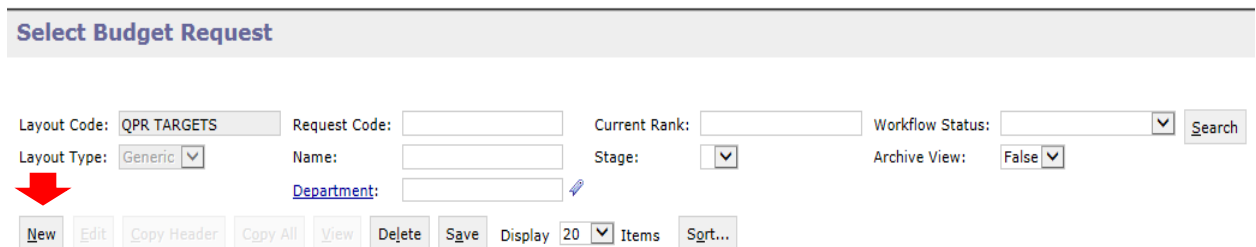


The **Budget Layout Selection** screen will appear.

Step 2. From the **Budget Layout Selection** screen, select **QPR Targets**.



The **Select Budget Request** screen will appear.



Step 3. Click **NEW** to create your targets. The Header page will appear.

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: * Name:

* Stage: 1 Ranking Type:

Description:

Budget Request Information

Dimensions ⓘ

Department:

Step 4. 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 for both:

REQUEST CODE EXAMPLE: 005 QPRT 2017

DEPARTMENT NUMBER: 005

QPRT

CURRENT FISCAL YEAR: 2017

NAME: 005 QPRT 2017

DEPARTMENT NUMBER: 005


QPRT

CURRENT FISCAL YEAR: 2017

The screenshot shows the 'Edit Budget Request' form with a purple header bar containing an information icon and the message 'Action was successful.' Below the header are 'Save' and 'Back' buttons. The main content area has tabs for 'Edit Budget Request', 'QPR Targets', and 'Document Management'. A 'Notify' button is present. Below the tabs are links for 'Expand All' and 'Collapse All'. The form is divided into several sections:

- Budget Request Details:** Includes fields for '* Request Code:' (005 QPRT 2017), '* Name:' (005 QPRT 2017), 'Stage:' (1), 'Description:' (text area), 'Workflow Status:' (Work In Progress), 'Ranking Type:' (with a pencil icon), and 'Current Rank:'.
- Reason For Change:** A text input field.
- Budget Request Information:** A text input field.
- Dimensions:** Includes a 'Department:' field with the value '005' and the text 'Corrections' below it.

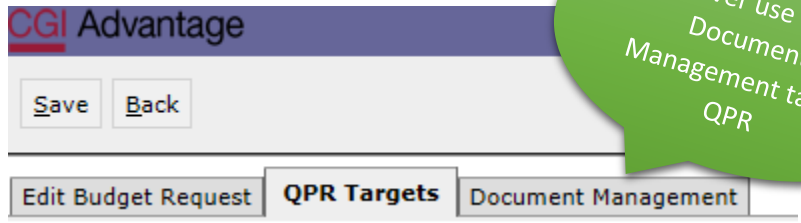
Step 5. Be sure to provide the **Department** number in the **Dimensions** section at the bottom of the header page.

Step 6. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

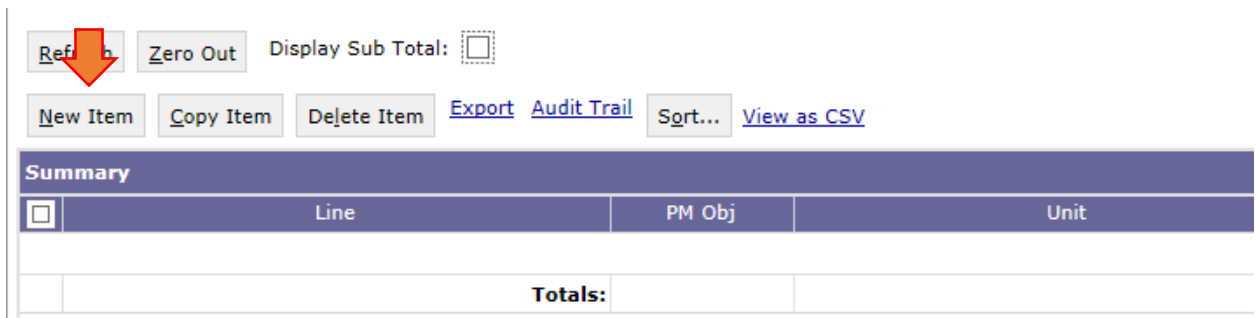
This screenshot shows the top portion of the 'Edit Budget Request' form. It features a purple header bar with an information icon and the message 'Action was successful.' Below the header are 'Save' and 'Back' buttons. The main content area has tabs for 'Edit Budget Request', 'QPR Targets', and 'Document Management'. A 'Notify' button is located below the tabs.

Supplementary tabs will emerge that will allow you to enter the quarterly and annual targets for each performance measure. The tabs are: **QPR Targets** and **Document Management**.

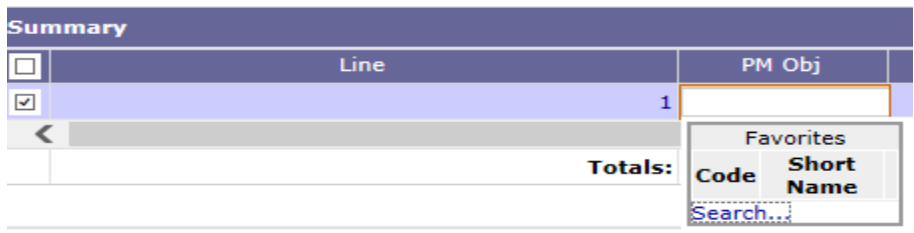
NOTE: You will never use the Document Management tab within Performance Measures. Documents (reports) will always be attached to an Operations Plan, Budget Request or Revision as a PDF during the annual setup. For quarterly reporting, never print. EBO will access all department reports and consolidate for reporting purposes.



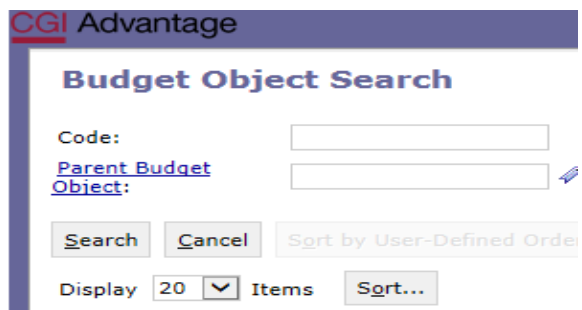
Step 7. Click **New Item** to create a new target. Use the first line to begin entering the data.




Step 8. Begin with the **PM Obj** section. **Right click** in the field to search for the targets that preexist for the department.



The **Budget Object Search** screen will appear.




Step 9. Click **Search** again for the list of targets to appear. Click **Select**  for the target(s) to add on the beginning of the year QPR report.

CGI Advantage

Budget Object Search

Code: Name: Object Type: * Element Type:

[Parent Budget Object:](#)  Short Name: Itemization Type:


Display Items

	Code	Name	Short Name	Object Type	Element
<input type="button" value="Select"/>	005-01	Annual Inmate Health Services Cost Will Not Exceed 99.43 Mil	Annual inmate h	Performance Measure	COA

Step 10. Once the target is selected, the screen will return to the main screen allowing agencies to input the quarterly targets across **Quarter 1, Quarter 2, Quarter 3, and Quarter 4**. **NOTE:** The system will not automatically calculate the Annual Target column. You will need to enter the Annual Target total as well.

PM Obj	Unit	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Annual Target
005-01		25,000,000	25,000,000	13,000,000	15,000,000	78,000,000

Continue by entering as many targets desired for the department to report quarterly performance indicators. (The example provided is an agency with one target).

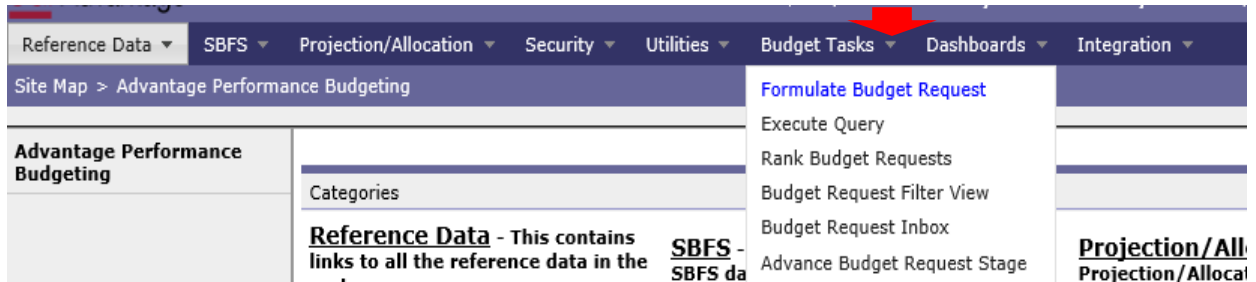
Step 11. Once all targets have been included, click **Save**  at the top of the page. The **Action was Successful** message will appear.

DO NOT SUBMIT QUARTERLY TARGETS TO EBO

Quarterly Performance Report (ACTUALS)

V. ACTUALS

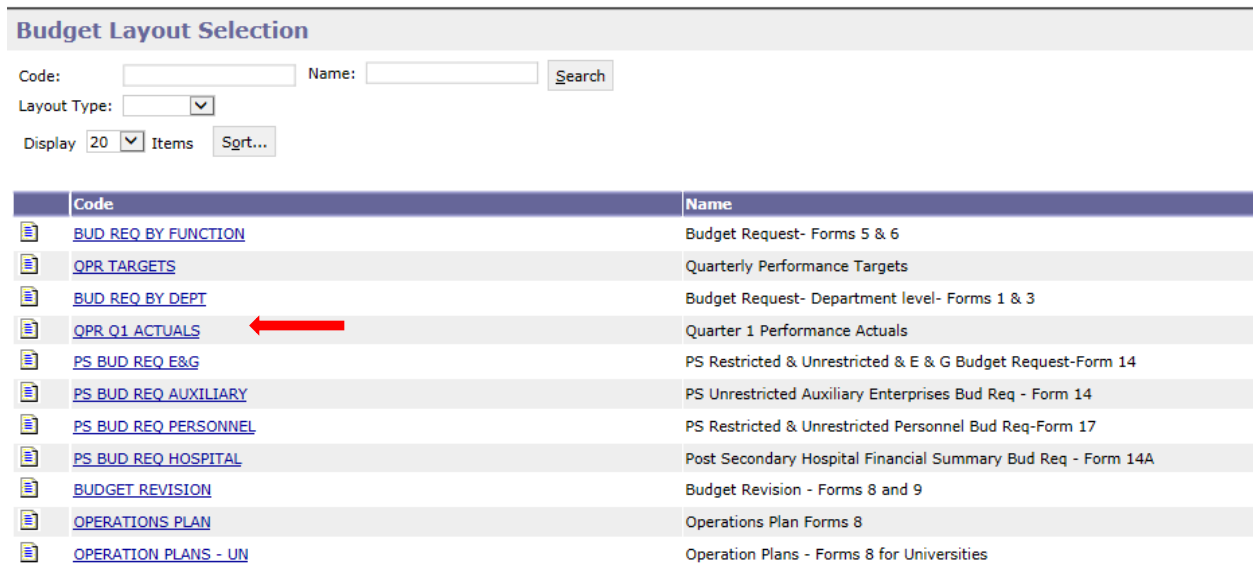
Step 1. Using the tool bar, click on **Budget Task**, then click **Formulate Budget Request** from the dropdown menu.



The screenshot shows the application's top navigation bar with several tabs: Reference Data, SBFS, Projection/Allocation, Security, Utilities, Budget Tasks, Dashboards, and Integration. The 'Budget Tasks' dropdown menu is open, showing options: Formulate Budget Request (highlighted with a red arrow), Execute Query, Rank Budget Requests, Budget Request Filter View, Budget Request Inbox, and Advance Budget Request Stage. Below the navigation bar, the 'Advantage Performance Budgeting' section is visible, including a 'Categories' list and a 'Reference Data' link with a description: 'Reference Data - This contains links to all the reference data in the SBFS - SBFS da'. To the right, a 'Projection/Allocation' section is partially visible.

The **Budget Layout Selection** screen will appear.

Step 2. From the **Budget Layout Selection** screen, select **QPR Q1 ACTUALS**.



The screenshot shows the 'Budget Layout Selection' screen. It features a search bar with 'Code:' and 'Name:' fields, a 'Search' button, and a 'Layout Type:' dropdown. Below the search bar, there are 'Display' and 'Items' dropdowns, and a 'Sort...' button. A table lists various budget layout options with a red arrow pointing to 'QPR Q1 ACTUALS'.

Code	Name
BUD REQ BY FUNCTION	Budget Request- Forms 5 & 6
QPR TARGETS	Quarterly Performance Targets
BUD REQ BY DEPT	Budget Request- Department level- Forms 1 & 3
QPR Q1 ACTUALS	Quarter 1 Performance Actuals
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
OPERATION PLANS - UN	Operation Plans - Forms 8 for Universities

The **Select Budget Request** screen will appear.

Step 3. Click **NEW** to create your actuals. The Header page will appear.


Step 4. Complete the required fields in the **Budget Request Details** section by entering your agency information for the QPR Form as follows:

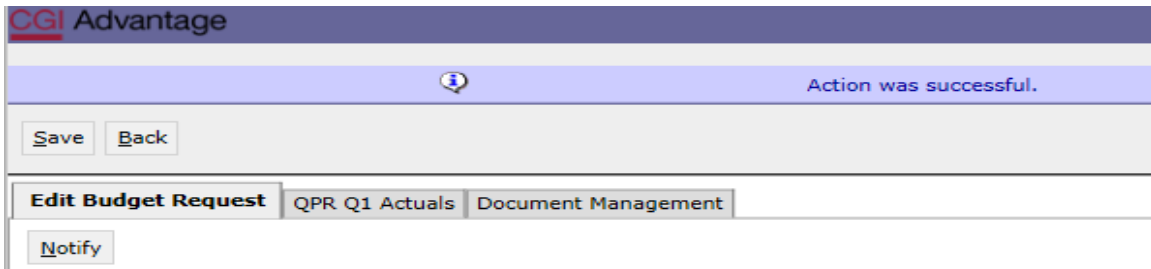
Enter the **Request Code** and the **Name** using the following format for both:

REQUEST CODE EXAMPLE: 005 QPR1A 2017


NAME: 1st Quarter 2017

Step 5. Be sure to provide the **Department** number in the **Dimensions** section at the bottom of the header page.

Step 6. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.



Supplementary tabs will emerge that will allow you to enter the targets for each performance measure. The tabs are: **QPR Q1 Actuals** and **Document Management**.


Step 7. All performance measures (PM) objectives, units of measure and targets previously identified should automatically appear. If you do not see the data prepopulated then click  **Update Preload** and the data should come into view.


Step 8. Enter the data for each objective in the **Quarter 1 Actuals** column.

Refresh Zero Out Update Preload Display Sub Total:

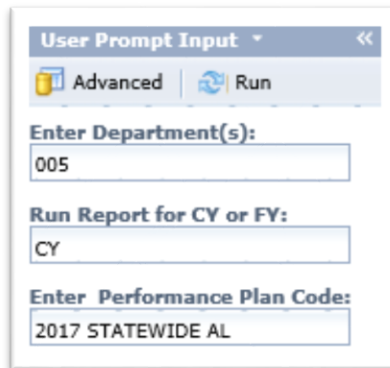
New Item Copy Item Delete Item Export Audit Trail Sort... View as CSV

Summary					
<input type="checkbox"/>	Line	PM Obj	Unit	First Quarter Target 2016	Quarter 1 Actuals
<input checked="" type="checkbox"/>		1 005-01	Dollars	28,500,000	
Totals:				28,500,000	0



Step 9. Once all actuals data for each measure has been included, click **Save**  at the top of the page. The **Action was Successful** message will appear.

Step 10. You can generate the final report in infoAdvantage using the **ABUD-QPR-001 Quarterly Performance Report** using the following prompts:



The screenshot shows a 'User Prompt Input' dialog box. At the top, there is a title bar with the text 'User Prompt Input' and a back arrow icon. Below the title bar, there are two buttons: 'Advanced' (with a folder icon) and 'Run' (with a refresh icon). The dialog contains three input fields with the following labels and values:

- Enter Department(s):** 005
- Run Report for CY or FY:** CY
- Enter Performance Plan Code:** 2017 STATEWIDE AL

1. Enter Department(s) Number: 3-digit Agency Number
2. Run Report for CY or FY:
 - a. For annual reporting input FY (Future Year) in the prompt.
 - b. For quarterly reporting input CY (Current Year) in the prompt.
3. Enter Performance Plan Code: Prepopulates

Review the report for accuracy and if edits need to be made return to the Performance Budgeting application. If the report is accurate, you are finished. Print and retain copies for your office files, if desired.

YOU HAVE SUCCESSFULLY COMPLETED ENTERING THE DEPARTMENT ACTUALS.

DO NOT SUBMIT THROUGH WORKFLOW

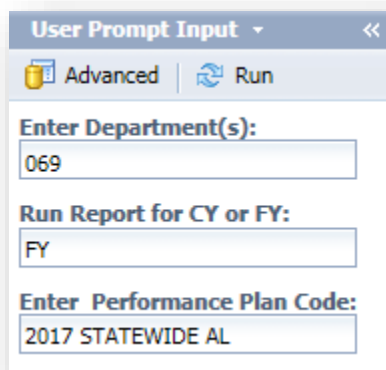
NOTE: You will never use the **Document Management** tab within Performance Measures. After each quarter, EBO will access all department reports and consolidate for reporting purposes. Agencies should not use workflow to submit targets or actuals.

SUBMISSION OF QUARTERLY PERFORMANCE REPORTS TO THE EXECUTIVE BUDGET OFFICE

Annual Fiscal Year Operations Plan Submissions

The Quarterly Performance Report, ABUD-QPR-001, should be generated in CGI infoAdvantage. Once the report is created, please print a copy of the report and review the data for completeness and accuracy. Return to the Operations Plan-Form 8 in Performance Budgeting (PB) and attach the finalized QPR report as a PDF to the Document Management tab along with other documents required for submission of the annual Operations Plan. Annual Operation Plans will not be approved without the submission of the annual QPR goals and targets.

PROMPTS:



1. Enter Department(s) Number: 3-digit Agency Number
2. Run Report for CY or FY:
 - a. For annual reporting input FY (Future Year) in the prompt.
 - b. For quarterly reporting input CY (Current Year) in the prompt.
3. Enter Performance Plan Code: Prepopulates

Quarterly (4) Submissions throughout the Fiscal Year

EBO will continue to send out reminders when it's time for agencies to input quarterly targets. The application will be open for 30 days after each quarter ends. Agencies should log into PB to report actuals at the end of each quarter.

Once the Quarterly Performance Report, ABUD-QPR-001, report is generated please print a copy of the report and review the data for completeness and accuracy. Send your budget analyst a courtesy email notifying them that the Quarterly data has been completed. DO NOT click Submit and move QPR through workflow. At the end of the quarter EBO will access all agency reports to compile a statewide report that will be posted to our website.

Below is an example of a completed Quarterly Performance Report at the beginning of the Fiscal Year.

Report ID: STAARS-QPR-0001	State of Alabama
Report Date: 7/13/16	Quarterly Performance Report
Report Time: 10:39:26 AM	Fiscal Year 2017

Cover Page

Parameters and Prompts

Department(s):	069
CY or FY:	FY
Performance Plan:	2017 STATEWIDE AL

Report Description

This report will display the performance targets and corresponding year-to-date actual information for an agency. The report will also display the mission, vision, and goals established by the agency. This report will be run on demand by regular agency, postsecondary institution, and EBO users, primarily during the operations plan cycle (June 1 – September 1). This report will also be run quarterly by agency and EBO users, coinciding with the recording of quarterly actuals.

Department: 069 - Ala Community College System

Mission: The Alabama Community College System has direct responsibility to the Alabama Community College System Board of Trustees for the direction and supervision of educational programs and services provided by the Alabama Community College System. The System Office provides leadership, service, and regulatory functions for the member institutions of the Alabama Community College System to ensure educational accessibility, excellence and equity for all citizens of Alabama.

Vision: To develop an educated, prosperous population by providing an affordable pathway to help citizens of any walk or stage of life to succeed through quality education and training; a community college system where education works for all.

Annual Goals

01	Provide a skilled workforce for Alabama's existing industries in targeted occupational sectors.
02	Increase the number of individuals served in Adult Education programs.
03	Conduct peer reviews at ACCS institutions; identify best practices, efficiencies & opportunities.

Quarterly Objectives and Targets

	Unit of Measure	Goal	First Quarter			Second Quarter		Third Quarter		Fourth Quarter		Annual	
			Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual	
01	Increase number of students who earn a short-term or long-term certificate, degree, or an industry recognized credential.	Percentage	01	0	0	0	0	0	0	0	0	5	0
02	Increase the number of individuals served in Adult Education.	Percentage	02	0	0	0	0	0	0	0	0	5	0
03	Conduct peer reviews at two ACCS institutions will identify best practices, efficiencies, and opportunities for improvements.	Number	03	0	0	0	0	0	0	0	0	12	0