

STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)

QUARTERLY PERFORMANCE REPORT

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. It is required that each state agency input a minimum of one goal and one performance objective. 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. 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 in the application. Please contact STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov for access.

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

To access reports in infoAdvantage <https://infoadv.staars.alabama.gov/BOE/BI>

Agencies with access to STAARS Financials should access infoAdvantage through Financials.

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

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 and goals performance measures for accuracy. Changes should only be made at the beginning of the fiscal year when setting up the initial data. 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**.

The screenshot shows the 'Reference Data' menu in the CGI Advantage system. The 'Performance Budgeting' option is highlighted in blue. A red arrow points to this option. Below the menu, the 'Performance Budgeting' page is displayed, showing a list of categories and their descriptions. A second red arrow points to the 'Performance Budgeting' link in the list.

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.	Positions, Employees and Assignments - This contains links to Positions, Employees and Assignments.
Dimensions - This contains all the dimension links.	Benefits and Supplemental - This contains links to Benefits and Supplemental.
Budget Forms - This contains all the Budget Form links.	Class, Category and Other - This contains links to Class, Category and Other.
Performance Budgeting - This contains all the Performance Budgeting definition links.	Salary Tables - This contains links to Salary Tables.
Budget Ranking - This contains all the Budget Ranking definition links.	Salary Projections - This contains links to Salary Projection.
Queries - This contains links to Queries.	
Workflow - The following are Workflow-specific links.	
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**.

The screenshot shows the 'Performance Budgeting' screen in the CGI Advantage system. The 'Performance Missions' option is highlighted in blue. A red arrow points to this option.

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**.

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](#)

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 type="checkbox"/>	Code	Name
<input type="checkbox"/>	069-MISSION	Alabama Community College System

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

CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting >


Performance Mission View Documentation

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

Performance Mission Basic Information ⓘ

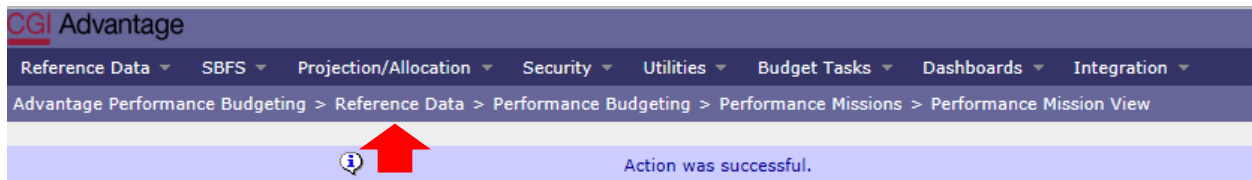
* Code:	<input type="text" value="069-MISSION"/>
* Security Organization :	<input type="text" value="DEPT-069"/>
Name:	<input type="text" value="Alabama Community C"/>
Short Name:	<input type="text" value="ACCS"/>
Description:	<input type="text"/>
Initiator:	<input type="text"/>

Step 6. Under the **Performance Mission Detail Information** section, edit the Mission and Vision of the department only if necessary. The Mission and Vision are in the same location, continue scrolling down until you see the Vision statement.

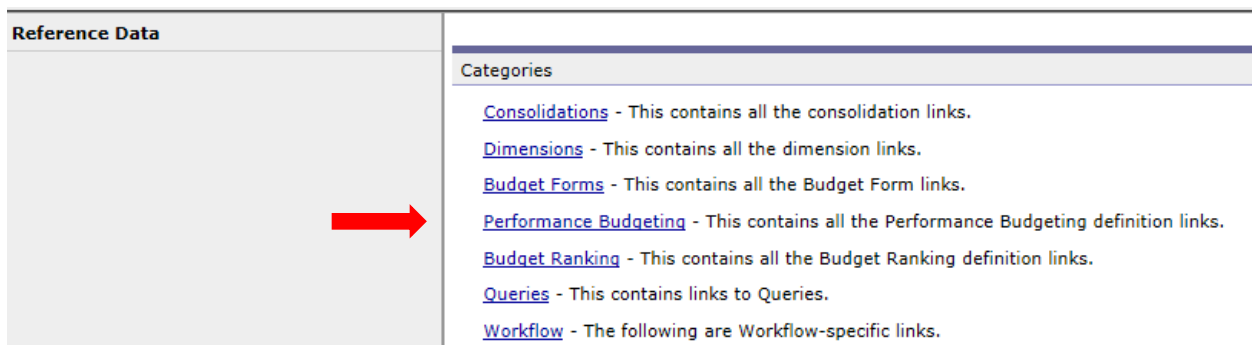
Step 7. Once complete, click **Save**  at the top of the page. The **Action was Successful** message will appear.

II. GOALS

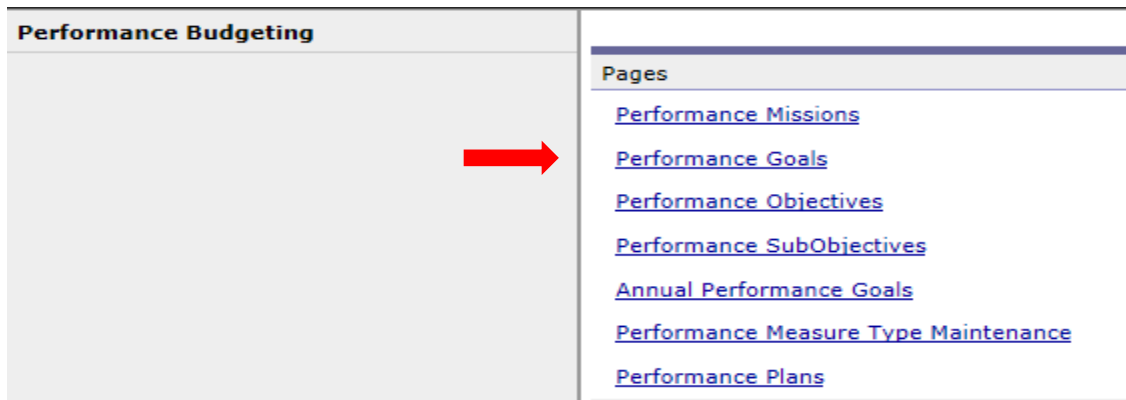
Step 8. Using the thread (or bread crumb trail), return to the **Reference Data** screen.



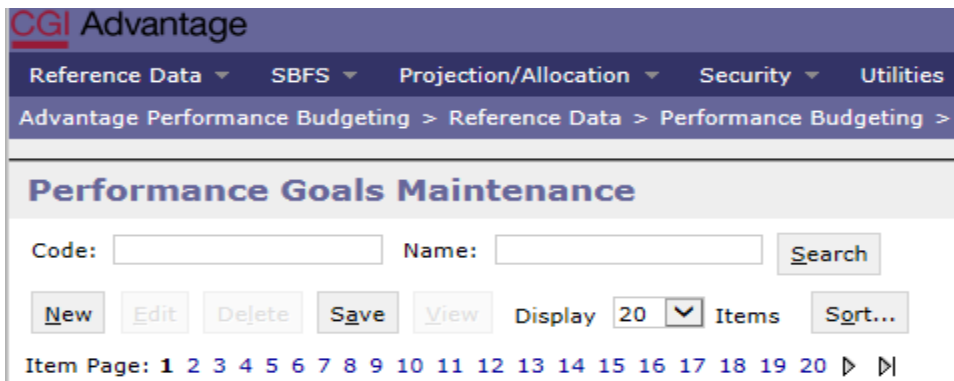
Step 9. Select **Performance Budgeting** under the Categories section. The **Performance Budgeting** Screen will appear.



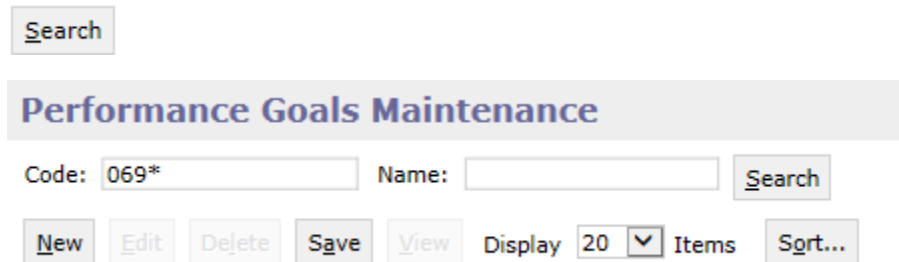
Step 10. From the **Performance Budgeting** screen, select **Performance Goals**.



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



Step 11. In the **Code** field enter the **3-digit Department number** (include the asterisk). Click **Search**.



Step 12. 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 type="checkbox"/>	Code	Name
<input type="checkbox"/>	069-GOAL-001	Provide a Skilled Workforce
<input type="checkbox"/>	069-GOAL-002	Increase the number of individuals served in Adult Education
<input type="checkbox"/>	069-GOAL-003	Conduct Peer Reviews

Step 13. Click **VIEW** or **EDIT** to verify the **security organization, name, short name** and **description**.

Performance Goal View | Performance Allocations | Milestones | Documentation

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

Basic Information

* Code:

* Security Organization:

Name:

Short Name:

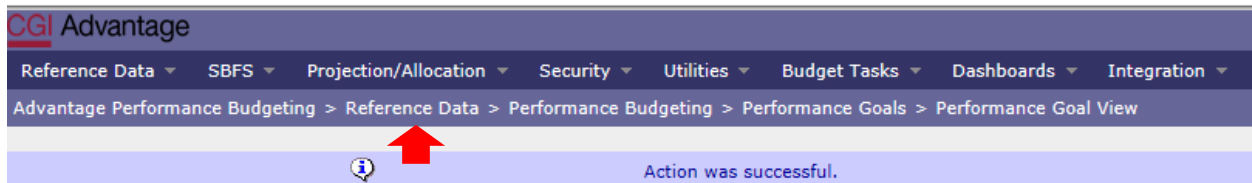
Description:

Initiator:

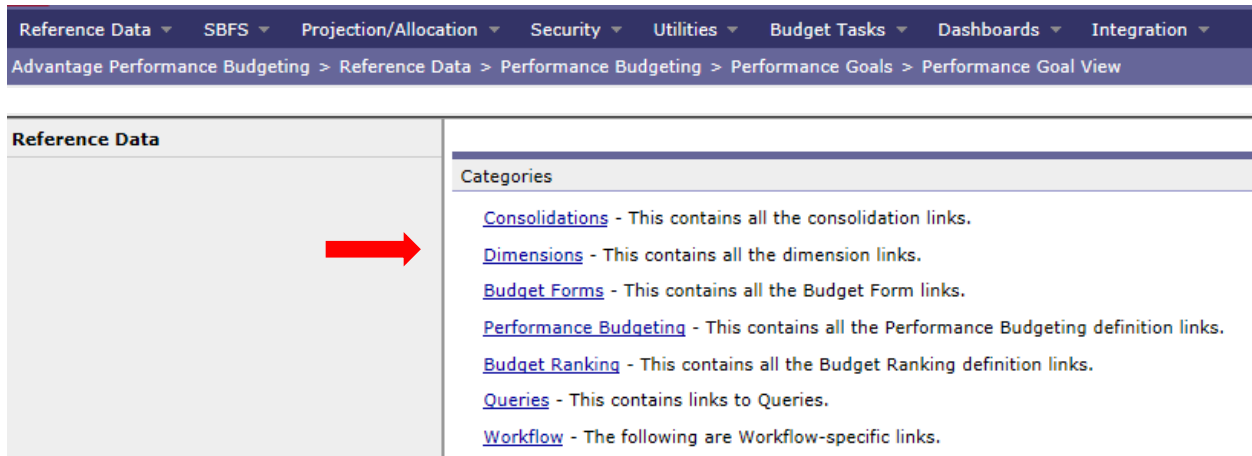
Step 14. Once complete, click **Save** at the top of the page. The **Action was Successful** message will appear.

III. PERFORMANCE PLANS

Step 15. Using the thread (or bread crumb trail), return to the **Reference Data** screen.

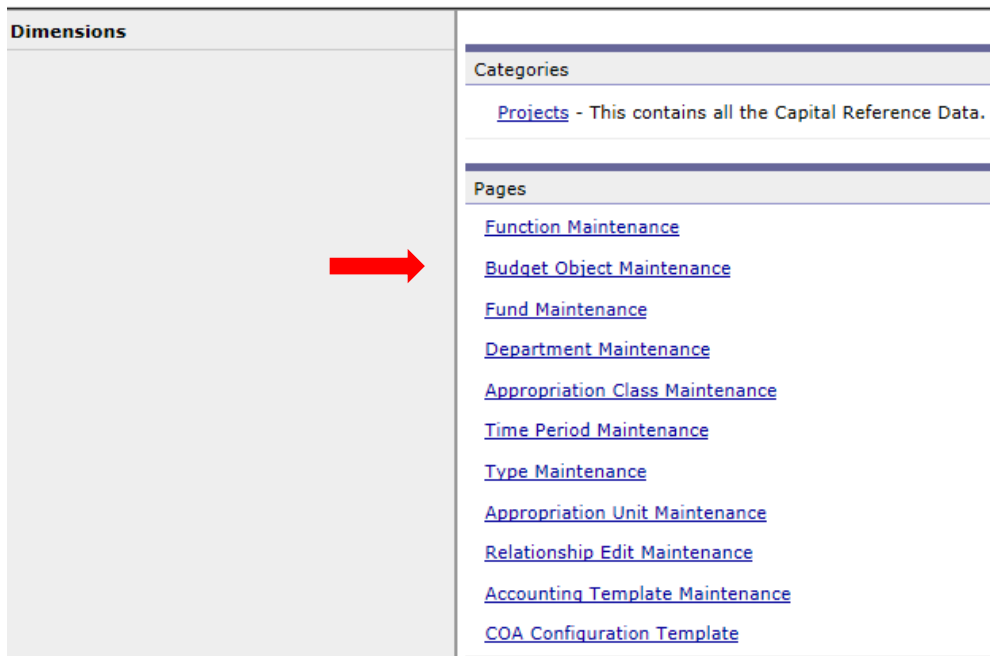


Step 16. Select **Dimensions** under the Categories section.



The **Dimensions** screen will appear.

Step 17. From the **Dimensions** screen, select **Budget Object Maintenance**.



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

Budget Object Maintenance

Code: Name: Short Name: Element Type: Object Type:

Usage: Postable: Parent Budget Object:

Itemization Type:

Display Items

Step 18. 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**.

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

Performance Goals Maintenance

Code: Name:

Display Items

<input type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	069-GOAL-001	Provide a Skilled Workforce
<input type="checkbox"/>	069-GOAL-002	Increase the number of individuals served in Adult Education
<input type="checkbox"/>	069-GOAL-003	Conduct Peer Reviews

Step 19. Select the code for your department to review the information in the performance hierarchy. Click **VIEW**. Contact EBO for edits.

Budget Object Maintenance

Code: Name: Short Name: Element Type: Object Type:

Usage: Postable: Parent Budget Object:

Itemization Type:

Display Items

<input type="checkbox"/>	Code	Name	Short Name	Element Type	Object Type
<input checked="" type="checkbox"/>	069-01	Incrs Number of Students Who Earn A Short-Term Or Long-Term	Incr # of Certi	Object	Performance Measure
<input type="checkbox"/>	069-02	Incrs The Number of Individuals Served In Adult Education.	Incr # serv adu	Object	Performance Measure
<input type="checkbox"/>	069-03	Conduct Peer Reviews at 12 Accs Institutions	Conduct peer re	Object	Performance Measure

Step 20. 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 for edits.


Edit Budget Object	Performance Allocations	Milestones	Documentation	Document Management
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[Expand All](#) | [Collapse All](#)

Dimension Information ⓘ

* Code:	069-01	* Element Type:	Object
Name:	Incrs Number of St: x	Active:	<input checked="" type="checkbox"/>
* Security Organization:	DEPT-069	Postable:	<input checked="" type="checkbox"/>
Short Name:	Incr # of Certi	* Usage:	Coded
Description:	Increase number of short-term or long-term certificates, degrees, or	* Object Type:	Performance Measure
<i>Fiscal Period</i>		Itemization Type:	
Fiscal Year:	Start Date:	End Date:	Decimal Precision: 0

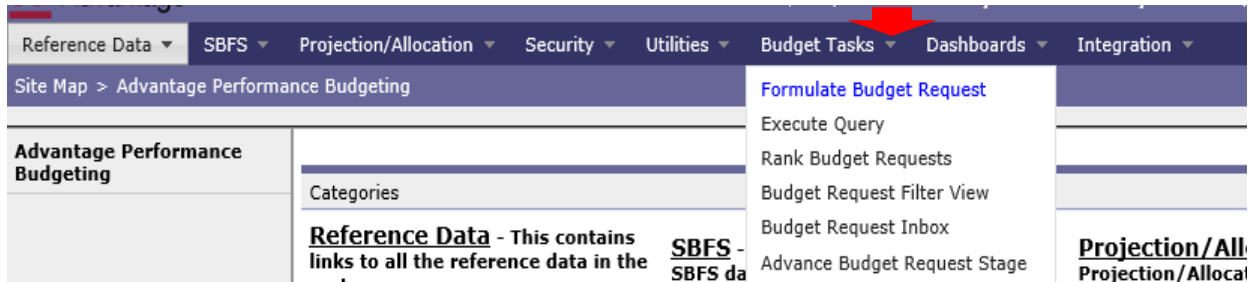
If additional performance measures need to be added, contact the EBO. We will walk you through the process of creating new goals and/or measures.

Step 21. Once complete, click [Save](#)  at the top of the page. The **Action was Successful** message will appear.

Quarterly Performance Report (Targets)

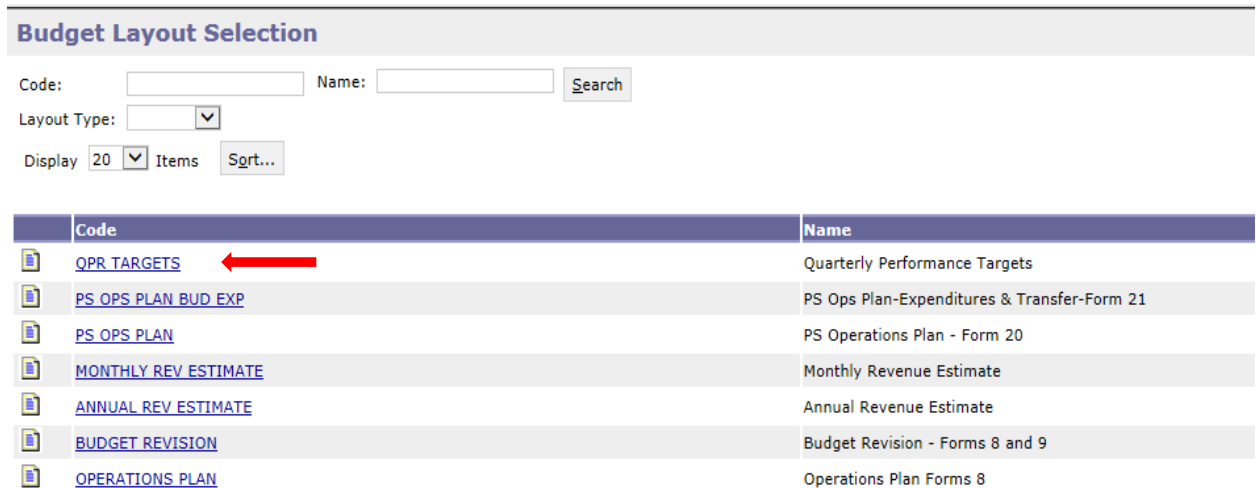
IV. TARGETS

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

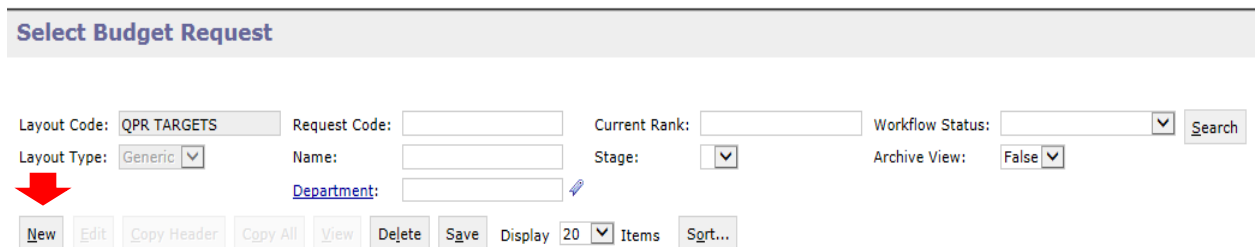


The **Budget Layout Selection** screen will appear.

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: 069 QPRT 2018

DEPARTMENT NUMBER: 069

QPRT

CURRENT FISCAL YEAR: 2018

NAME: 069 QPRT 2018

DEPARTMENT NUMBER: 069

QPRT

CURRENT FISCAL YEAR: 2018

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: 069 QPRT 2018 * Name: 069 QPRT 2018

* Stage: 1

Description:

Ranking Type: ⓘ


Ranking Type:

Budget Request Information

Dimensions ⓘ

Department: 069 ⓘ

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.

CGI Advantage

Action was successful.

Save Back

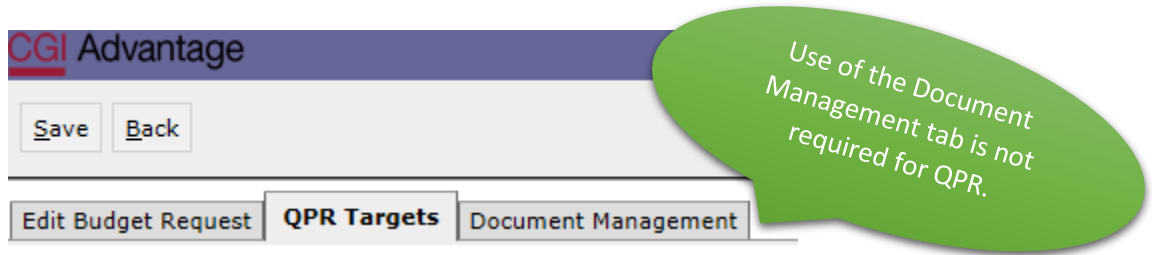
Edit Budget Request | QPR Targets | Document Management

Notify

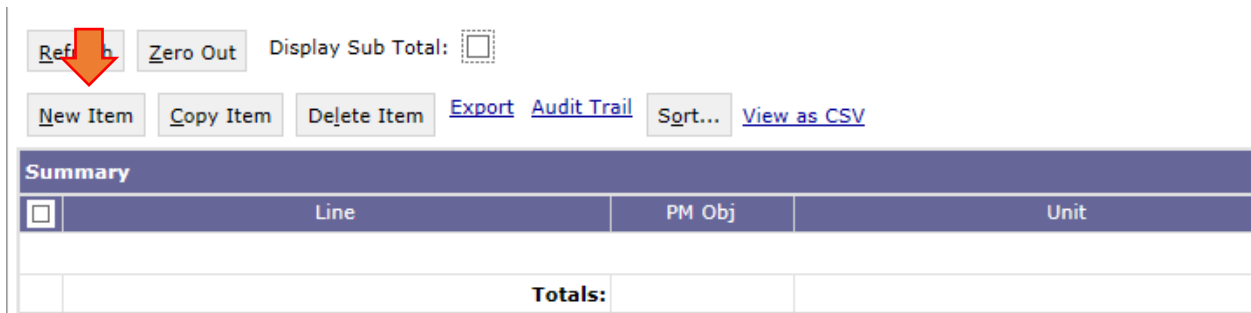
Supplementary tabs will emerge that will allow you to enter the quarterly and annual targets for each performance measure. The tabs are: **QPR Targets** and **Document Management**.

NOTE: There is no need to use the Document Management tab within Performance Measures. Documents (reports) will always be attached to an Operations Plan, Budget Request or Revision as a

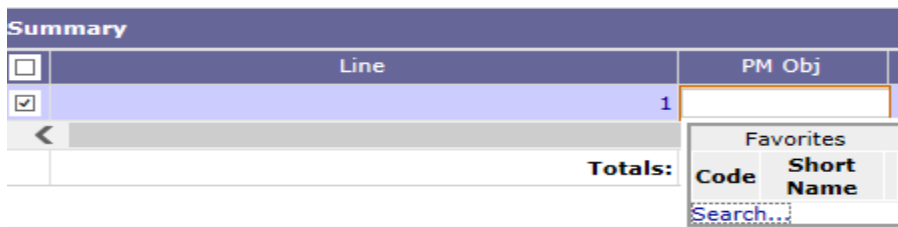
PDF. Since QPR does not move through workflow, if you chose to add documents to the Document Management tab, this would be a quick agency review before starting each quarterly report.



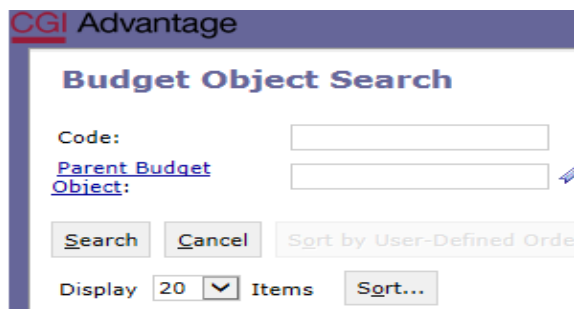
Step 7. Click **New Item** to create a new target. Use the first line to begin entering the data.




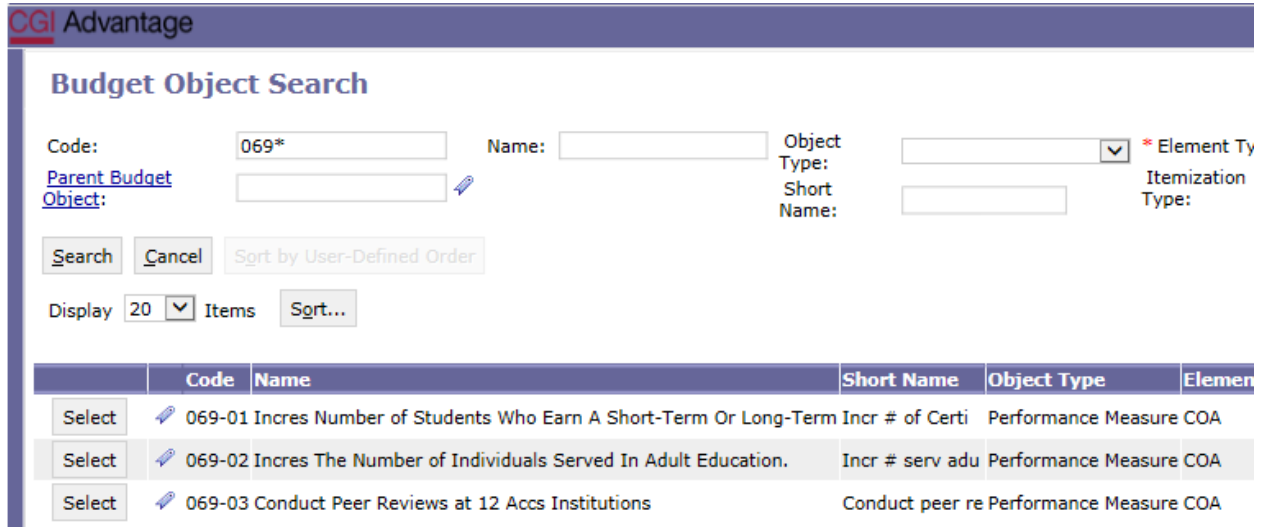
Step 8. Begin with the **PM Obj** section. **Right click** in the field to search for the targets that preexist for the department.



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.




	Code	Name	Short Name	Object Type	Element
Select	069-01	Incrs Number of Students Who Earn A Short-Term Or Long-Term Incr # of Certi	Incr # of Certi	Performance Measure	COA
Select	069-02	Incrs The Number of Individuals Served In Adult Education.	Incr # serv adu	Performance Measure	COA
Select	069-03	Conduct Peer Reviews at 12 Accs Institutions	Conduct peer re	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
069-01	Percentage					5
069-02	Percentage					5
069-03	Number					12
		0	0	0	0	22

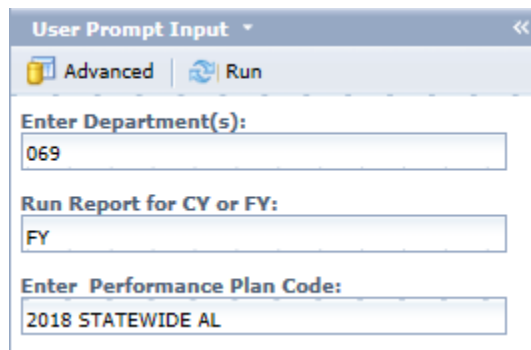
Continue by entering as many targets desired for the department to report quarterly performance indicators. (The example provided is an agency with one target).

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

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.



The screenshot shows a 'User Prompt Input' dialog box with the following fields and values:

- Enter Department(s): 069
- Run Report for CY or FY: FY
- Enter Performance Plan Code: 2018 STATEWIDE AL

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 create 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: 5/30/17	Quarterly Performance Report
Report Time: 11:51:25 AM	Fiscal Year 2018

Cover Page

Parameters and Prompts

Department(s): 069
CY or FY: FY
Performance Plan: 2018 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