

POSTSECONDARY

PERFORMANCE BUDGETING (PB) MANUAL  
FOR STAARS

## STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)

### OPERATIONS PLAN MANUAL

#### FOR POSTSECONDARY INSTITUTIONS

**Welcome to STAARS Performance Budgeting!** STAARS Budgeting is the system of record for budgeting for the State of Alabama. Postsecondary institutions will continue to complete operations plan forms 20 and 21 using tabs within STAARS Budgeting. These forms will be rolled up to create the department Operations Plan packet that will be submitted to the Executive Budget Office through electronic workflow.

#### OPERATIONS PLAN FORMS

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

#### **To Access STAARS Performance Budgeting (PB):**

Access to two different areas of STAARS will be required to complete your agencies Operation Plan. Operations Plan forms will be completed in the STAARS Performance Budgeting (PB) application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the Operations Plan packet.

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

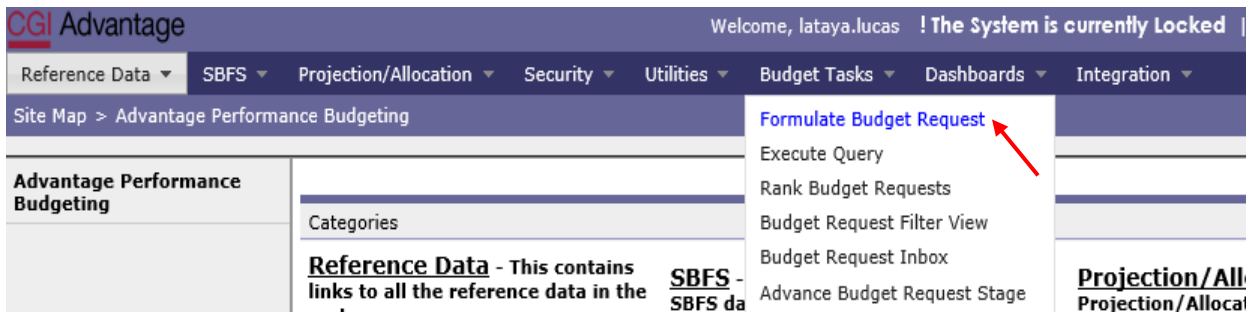
To access reports in infoAdvantage <https://infoadv.staars.alabama.gov/BOE/BI>

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](mailto:STAARS.Support@Finance.Alabama.gov) for login or password assistance.

**STAARS OPERATIONS PLAN MANUAL**  
**FOR POSTSECONDARY INSTIUTIIONS**

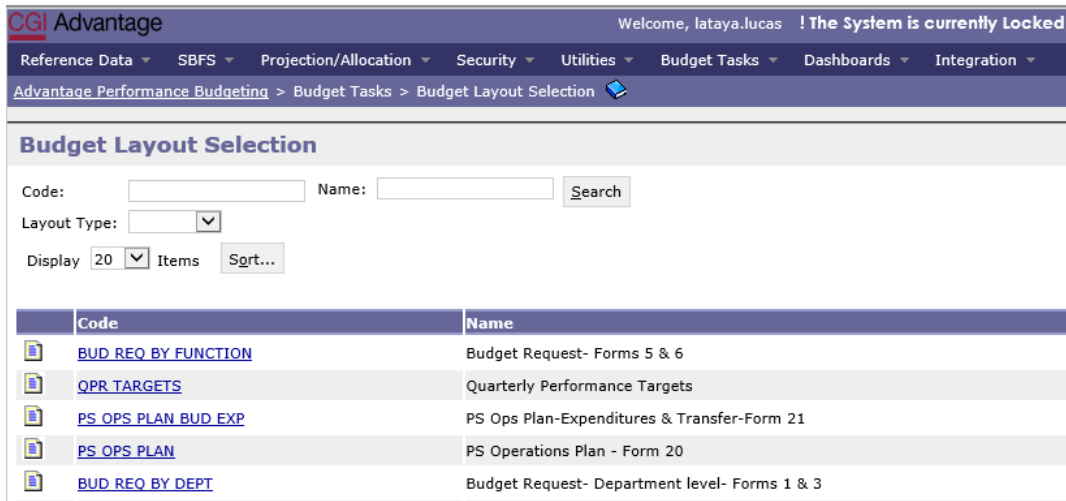
After you login STAARS Budgeting, you will be on the **Welcome Page** for the application. Begin by clicking the down arrow next to **Budget Tasks** on the task bar. Then select **Formulate Budget Request** on the drop down menu.



The **Budget Layout Selection** screen will appear. Notice the code names used to identify Forms 20 and 21 used for Operation Plans.

**PS OPS PLAN BUD EXP - PS Ops Plan-Expenditures & Transfer-Form 21**

**PS OPS PLAN – PS Operations Plan – Form 20**



## FORMS 21 – PS OPERATIONS PLAN

**Step 1.** Select [PS OPS Plan BUD EXP](#) under the Code section to begin creating Form 21.

CGI Advantage Welcome, lataya.lucas ! The System is currently Locked

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

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

### Budget Layout Selection

Code:  Name:

Layout Type:

Display  Items

Code	Name
<a href="#">BUD REQ BY FUNCTION</a>	Budget Request- Forms 5 & 6
<a href="#">QPR TARGETS</a>	Quarterly Performance Targets
<a href="#">PS OPS PLAN BUD EXP</a>	PS Ops Plan-Expenditures & Transfer-Form 21
<a href="#">PS OPS PLAN</a>	PS Operations Plan - Form 20
<a href="#">BUD REQ BY DEPT</a>	Budget Request- Department level- Forms 1 & 3

**Step 2.** On the **Select Budget Request** screen click **New**.

### Select Budget Request

Layout Code:  Request Code:  Current Rank:

Layout Type:  Name:  Stage:

Department:

Display  Items

The **Create Budget Request** screen appears.

The screenshot shows a web form with four main sections:

- Budget Request Details:** Includes fields for \* Request Code (513 OP PLAN FY2018), \* Name (Troy University), Stage (1), Description (text area), Workflow Status (Work In Progress), Ranking Type (text field), and Current Rank (0).
- Reason For Change:** Includes a Reason Description text area.
- Budget Request Information:** An empty section.
- Dimensions:** Includes a Department field with the value 513 and the text Troy State below it.

**Step 3.** Complete the required fields in the **Budget Request Details** section by entering your institution information for the Form 21 as follows:

Enter data in the **Request Code** and **Name** fields using the following format:

**REQUEST CODE EXAMPLE: 513 OP PLAN FY2019**

Agency Number: 3 digit Institution Number

Key the words: OP PLAN

Key the words: FY2019


**NAME EXAMPLE: TROY UNIVERSITY**

Name: Use the University Name

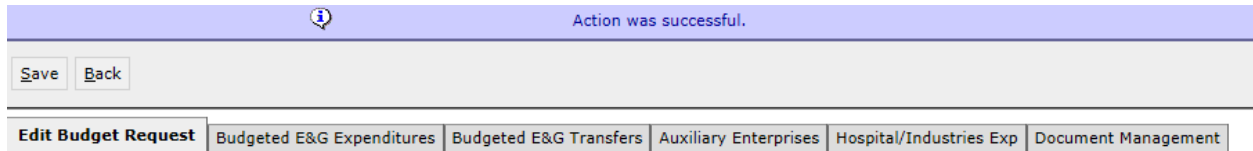
**Step 4.** Be sure to complete the **Dimensions** section at the bottom of the header page by adding the institution's three digit number.

The screenshot shows two sections of the form:

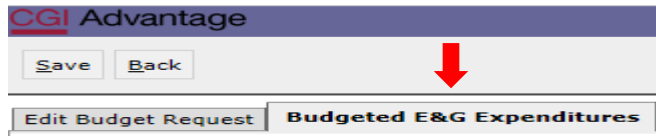
- Budget Request Information:** An empty section.
- Dimensions:** Includes a Department field with the value 513 and a blue pencil icon to its right.

**Step 5.** 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 data for the Form 21 Expenditures. The tabs are: **Budgeted E&G Expenditures, Budgeted E&G Transfers, Auxiliary Enterprises, Hospital/ Industries Exp,** and **Document Management.**



## BUDGETED E&G EXPENDITURES TAB



**Step 1.** Select the **Budgeted E&G Expenditures** tab.

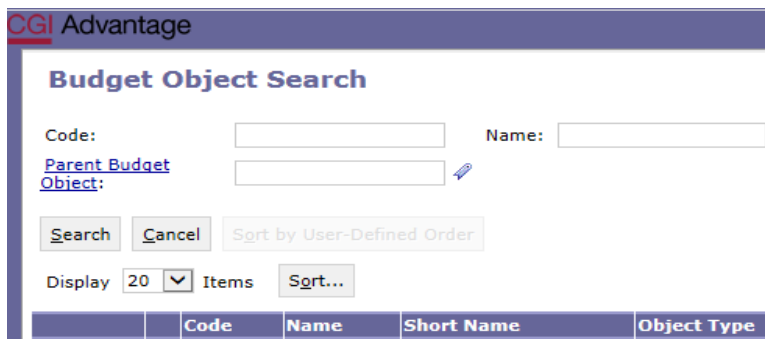
**Step 2.** Click **New Item** to insert a line to add unrestricted and restricted funds for the first Budget Object expense line.



**Step 3.** To determine what line of funding to report on each line, right click in the **Budget Object** field. Then click **Search**.



**Step 4.** The **Budget Object Search** screen will appear. Click **Search** again.



The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

**Budget Object Search**

Code:  Name:  Object Type:   
 Parent Budget Object:  Short Name:

Display  Items

	Code	Name	Short Name
Select	6320	Salaries and Wages	E&G-Sal & Wage
Select	6321	Employee Benefits	E&G-Emp Bene
Select	6322	Supplies & Expenses	E&G-Supp & Exp
Select	6323	Equipment and Other Capital Assets	E&G-Equip&Cap
Select	6324	Recoveries from Sales or Services	E&G-Re Sal/Srv
Select	6325	Fuel and Metered Utilities	E&G-Fuel&Meter
Select	6326	Scholarships and Fellowships	E&G-Schol&Fell

**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete Form 21 E&G expenditures for the institution.

**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear.

Edit Budget Request **Budgeted E&G Expenditures** Budgeted E&G Transfers Auxiliary Enterprises Hospital/Industries Exp Document Management

Budget Request Summary ⓘ

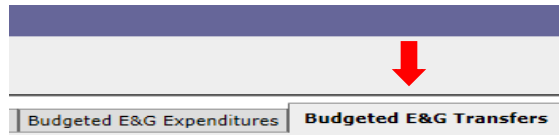
Layout Code: PS OPS PLAN BUD EXP Layout Type: Generic Request Code: 513 OP PLAN FY2018 Request Name: Troy University Stage: 1  
 Department: 513

Display Sub Total:  Select Model:

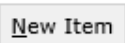
Summary						
<input type="checkbox"/>	Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS	
<input type="checkbox"/>	1	6320 E	93,939,942	7,296,887	101,236,829	
<input type="checkbox"/>	2	6321 E	28,912,656	1,688,326	30,600,982	
<input type="checkbox"/>	3	6322 E	47,018,769	1,837,304	48,856,073	
<input type="checkbox"/>	4	6323 E	963,009		963,009	
<input type="checkbox"/>	5	6325 E	7,568,160		7,568,160	
<input type="checkbox"/>	6	6326 E	25,005,728	967,355	25,973,083	
<b>Totals:</b>			<b>203,408,264</b>	<b>11,789,872</b>	<b>215,198,136</b>	



## BUDGETED E&G TRANSFERS TAB

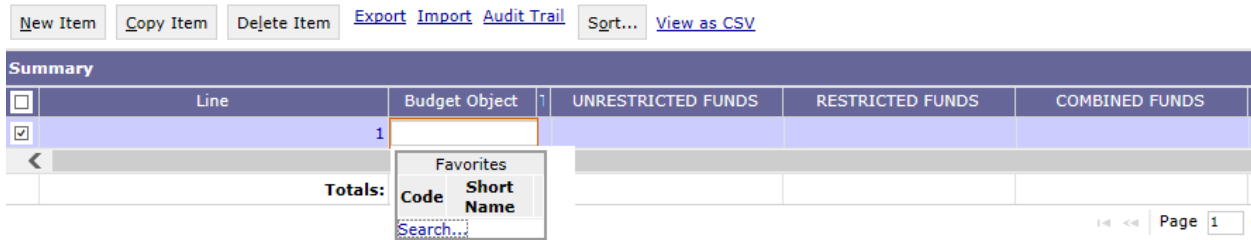


**Step 1.** Select the **Budgeted E&G Transfers** tab.

**Step 2.** Click **New Item**  to insert a line to add unrestricted and restricted funds for the first Budget Object expense line.



**Step 3.** To determine what line of funding to report for each line, right click in the **Budget Object** field. Then click **Search**.



**Step 4.** The **Budget Object Search** screen will appear. Click **Search**.



The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

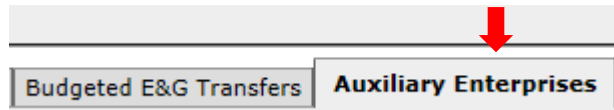
	Code	Name	Short Name	Object Type
Select	6160	Mandatory	E&G Tran-Mand	Expense
Select	6161	Non Mandatory	E&G Tran-NonMan	Expense
Select	6162	Debt Service	E&G Tran-Db Sr	Expense
Select	6163	Renewals and Replacements	E&G Tran-Re&Re	Expense
Select	6164	Loan Fund Matching Grant	E&G Tran-Ln Fd	Expense
Select	6165	Unexpended Plant Fund	E&G Tran-Unexp	Expense
Select	6166	Endowment Fund	E&G Tran-Endo	Expense
Select	6167	Loan Fund	E&G Tran-Loan	Expense
Select	6168	Auxiliary Enterprises	E&G Tran-Aux E	Expense
Select	6169	Other: Mobile Racing Comm.	E&G Tran-Mob R	Expense

**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete Form 21 E&G expenditures for the institution.

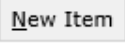
**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear.

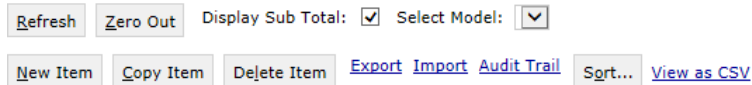
Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
1	6162 E	12,603,000		12,603,000
2	6169 E	21,119	1,114,771	1,135,890
<b>Totals:</b>		<b>12,624,119</b>	<b>1,114,771</b>	<b>13,738,890</b>

## AUXILIARY ENTERPRISES TAB



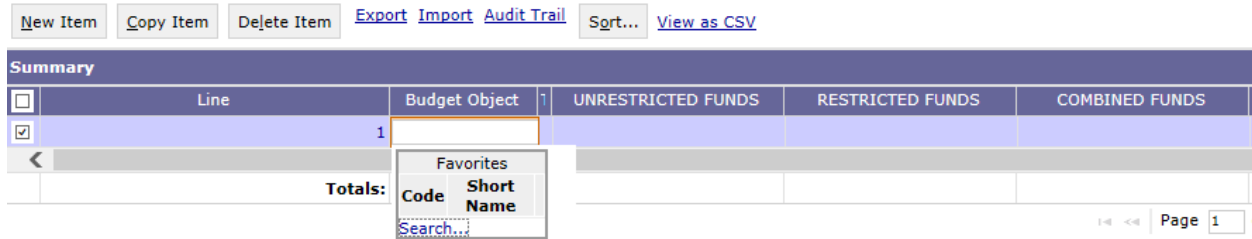
**Step 1.** Select the **Auxiliary Enterprises** tab.

**Step 2.** Click **New Item**  to insert a line to add unrestricted and restricted funds for the first budget object expense line.



Summary					
<input type="checkbox"/>	Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
<input checked="" type="checkbox"/>		1			

**Step 3.** To determine what line of funding to report for each line, right click in the **Budget Object** field. Then click **Search**.




**Step 4.** The **Budget Object Search** screen will appear. Click **Search**.

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### Budget Object Search

Code:  Name:

[Parent Budget Object:](#)  

Display

	Code	Name	Short Name	Object Type
--	------	------	------------	-------------

The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

**Budget Object Search**

Code:  Name:  Object Type:   
 Parent Budget Object:  Short Name:   
 Search  Cancel  Sort by User-Defined Order   
 Display  Items

	Code	Name	Short Name	Object Type
Select <input type="button"/>	6450	Salaries and Wages	Aux Exp-Sal&Wag	Expense
Select <input type="button"/>	6451	Employee Benefits	Aux Exp-Emp Ben	Expense
Select <input type="button"/>	6452	Supplies and Expenses	Aux Exp-Supp&Ex	Expense
Select <input type="button"/>	6453	Equipment and Other Capital Assets	Aux Exp-Eq&Cap	Expense
Select <input type="button"/>	6454	Transfer (Net)	Aux Exp-TranNet	Expense

**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete Form 21 E&G expenditures for the institution.

**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear.

Edit Budget Request | Budgeted E&G Expenditures | Budgeted E&G Transfers | **Auxiliary Enterprises** | Hospital/Industries Exp | Document Management

Budget Request Summary

Layout Code: PS OPS PLAN BUD EXP Layout Type: Generic  Request Code: 513 OP PLAN FY2018 Request Name: Troy University Stage: 1  
 Department: 513

Display Sub Total:  Select Model:

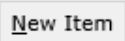
[Export](#) [Audit Trail](#) [View Graph](#)  [View as CSV](#)

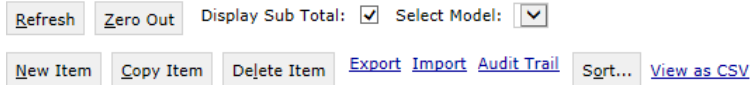
Summary	Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
<input type="checkbox"/>	1	6450 E	1,222,949		1,222,949
<input type="checkbox"/>	2	6451 E	220,325		220,325
<input type="checkbox"/>	3	6452 E	8,654,746		8,654,746
<input type="checkbox"/>	4	6453 E	51,500		51,500
	<b>Totals:</b>		<b>10,149,520</b>	<b>0</b>	<b>10,149,520</b>

## HOSPITAL/INDUSTRIES TAB (If Applicable)



**Step 1.** Select the **Hospital/Industries** tab.

**Step 2.** Click **New Item**  to insert a line to add unrestricted and restricted funds for the first budget object expense line.



Summary					
<input type="checkbox"/>	Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
<input checked="" type="checkbox"/>	1				

**Step 3.** To determine what line of funding to report for each line, right click in the **Budget Object** field. Then click **Search**.



**Step 4.** The **Budget Object Search** screen will appear. Click **Search**.

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### Budget Object Search

Code:  Name:

[Parent Budget Object:](#)  

Display

	Code	Name	Short Name	Object Type

The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

**Budget Object Search**

Code:  Name:  Object Type:   
Parent Budget    
Object:    
Short Name:

Display

	Code	Name	Short Name	Object T
Select <input type="button" value="Pencil"/>	6821	Salaries and Wages	Hos/Ind Sal & W	Expense
Select <input type="button" value="Pencil"/>	6822	Employee Benefits	Hos/Ind Emp Ben	Expense
Select <input type="button" value="Pencil"/>	6823	Supplies and Expenses	Hos/Ind Su & Ex	Expense
Select <input type="button" value="Pencil"/>	6824	Equipment and Other Capital Assets	Hos/Ind Equ/Cap	Expense
Select <input type="button" value="Pencil"/>	6825	Utilities	Hos/Ind Utiliti	Expense
Select <input type="button" value="Pencil"/>	6826	Transfers	Hos/Ind Transfe	Expense

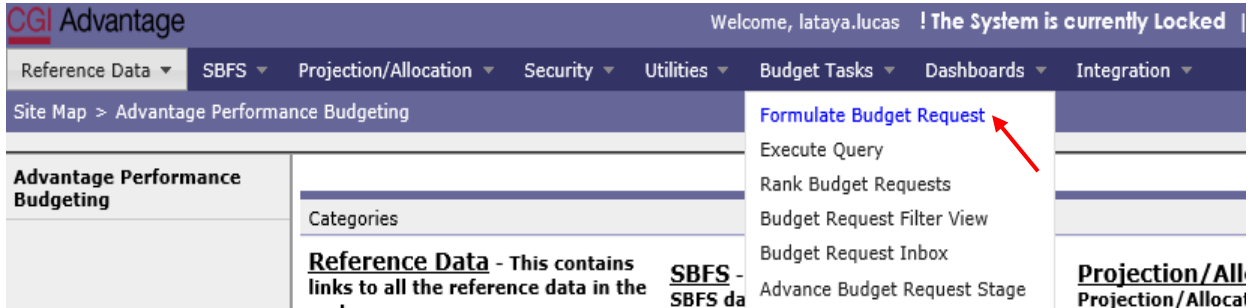
**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete the Hospital/Industries expenditures, if applicable.

**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear.

**You have successfully completed Form 21!**

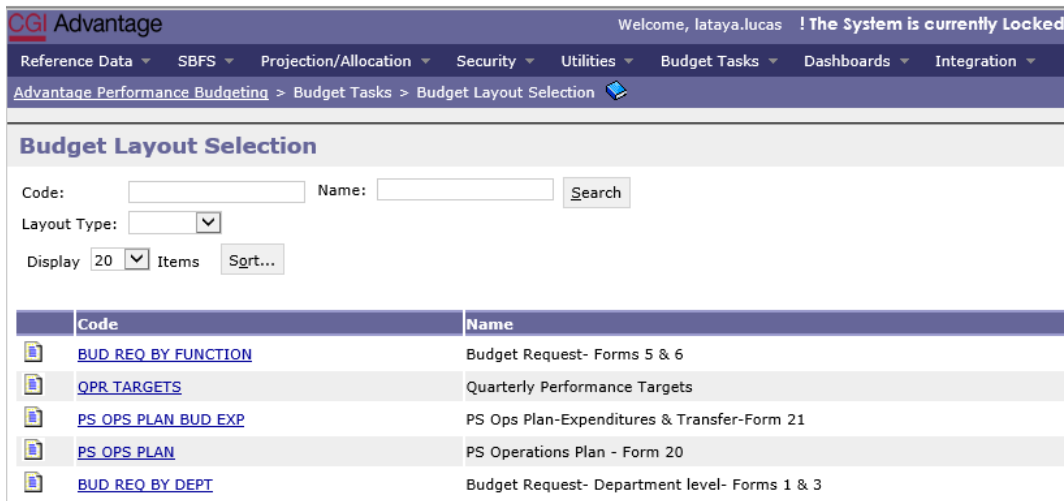
## FORMS 20 – PS OPERATIONS PLAN

Return to **Budget Tasks** on the task bar. Then select **Formulate Budget Request** on the drop down menu.



The **Budget Layout Selection** screen will appear. Notice the code names used to identify Form 20 used for Operation Plans.

### PS OPS PLAN - PS Ops Plan-Form 20



## FORMS 20 – OPERATIONS PLAN

**Step 1.** Select [PS OPS Plan](#) under the Code section to begin creating Form 20.

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

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

### Budget Layout Selection

Code:  Name:

Layout Type:

Display  Items

Code	Name
<a href="#">BUD REQ BY FUNCTION</a>	Budget Request- Forms 5 & 6
<a href="#">QPR TARGETS</a>	Quarterly Performance Targets
<a href="#">PS OPS PLAN BUD EXP</a>	PS Ops Plan-Expenditures & Transfer-Form 21
<a href="#">PS OPS PLAN</a>	PS Operations Plan - Form 20
<a href="#">BUD REQ BY DEPT</a>	Budget Request- Department level- Forms 1 & 3

**Step 2.** On the **Select Budget Request** screen click **New**.

CGI Advantage Welcome, lataya.lucas ! T

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

Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request

### Select Budget Request

Layout Code:  Request Code:  Current Rank:

Layout Type:  Name:  Stage:

Display  Items



The **Create Budget Request** screen appears.

The screenshot shows the 'Create Budget Request' interface. At the top, there are links for 'Expand All' and 'Collapse All'. Below this, the 'Budget Request Details' section is expanded, showing the following fields: 'Request Code' with the value '513 OP PLAN FY2018', 'Name' with the value 'Troy Univer Form 20', 'Stage' with a dropdown menu showing '1', and 'Description' with a text area. To the right of the 'Stage' field, there is a 'Ranking Type' field with a dropdown menu and a 'Ranking Type' label. Below the 'Budget Request Details' section, there is a 'Budget Request Information' section which is currently collapsed. At the bottom, there is a 'Dimensions' section which is also collapsed, showing a 'Department' field with the value '513' and a pencil icon for editing.

**Step 3.** Complete the required fields in the **Budget Request Details** section by entering your institution information for the Form 20 as follows:

Enter data in the **Request Code** and **Name** fields using the following format:

**REQUEST CODE EXAMPLE: 513 OP PLAN FY2019**

Agency Number: 3 digit Institution Number

Key the words: OP PLAN


Key the words: FY2019

**NAME EXAMPLE: TROY UNIVERSITY – Form 20**

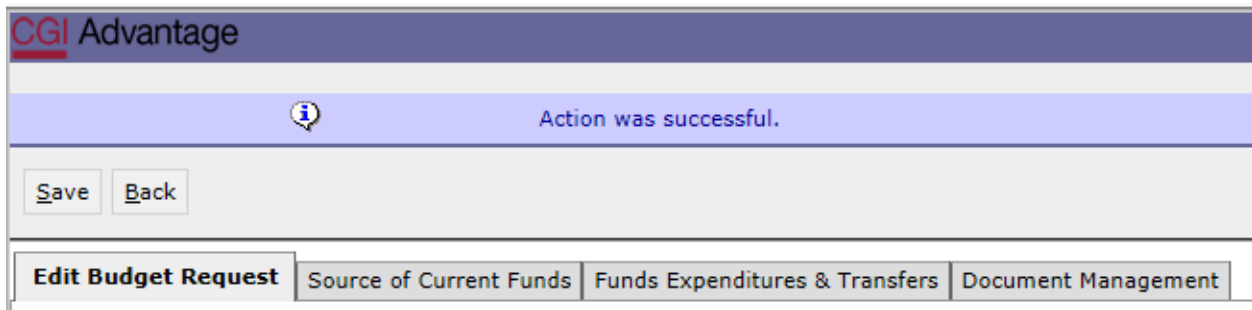
Name: Use the University Name

**Step 4.** Be sure to complete the **Dimensions** section at the bottom of the header page by adding the institution's three digit number.

The screenshot shows the 'Dimensions' section of the 'Create Budget Request' interface. The 'Department' field is expanded, showing the value '513' and a pencil icon for editing. Below the 'Department' field, the text 'Troy State' is displayed.

**Step 5.** 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 data for the Form 20 expenditures. The tabs are **Source of Current Funds, Funds Expenditures & Transfers** and **Document Management**.



## SOURCE OF CURRENT FUNDS



**Step 1.** Select the **Source of Current Funds** tab.

**Step 2.** Click **New Item** to insert a line to add unrestricted and restricted funds for the first Budget Object expense line.



**Step 3.** To determine what line of funding to report on each line, right click in the **Budget Object** field. Then click **Search**.



**Step 4.** The **Budget Object Search** screen will appear. Click **Search** again.



The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

**Budget Object Search**

Code:  Name:  Object Type:   \* Eleme  
 Parent Budget Object:  Short Name:  Itemiza  
 Type:  Type:

Display  Items

tem Page: **1** 2 3 4 5 6 7 8

	Code	Name	Short Name	Object Type	Elem
Select	7001	ETF Appropriation - Operations and Maintenance	ETF App-O & M	Revenue	COA
Select	7003	ETF Appropriation - Knight vs. Alabama	ETF App-Kn vsAL	Revenue	COA
Select	7006	ETF Appropriation - Arts Program	ETF App-Art Pro	Revenue	COA
Select	7007	ETF Appropriation - Agriculture Center Board	ETF App-Ag Ctr	Revenue	COA
Select	7008	ETF Appropriation - Agriculture Research and Extension State Match	ETF App-Ag Res	Revenue	COA
Select	7009	ETF Appropriation - Agriculture Research Station Fixed Costs	ETF App-Ag Re F	Revenue	COA
Select	7010	ETF Appropriation - Alabama Film Initiative	ETF App AL FILM	Revenue	COA
Select	7011	ETF Appropriation - Alabama Scenic River Trail	ETF App-AL Sc R	Revenue	COA
Select	7012	ETF Appropriation - Center for Applied Forensics	ETF App-Ctr App	Revenue	COA
Select	7014	ETF Appropriation - Cyber Security Center	ETF App-Cybr Se	Revenue	COA
Select	7015	ETF Appropriation - Desegregation Planning	ETF App-Deseg P	Revenue	COA

**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete Form 20 revenues for the institution.

**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear along with the Combined Funds

Edit Budget Request **Source of Current Funds** Funds Expenditures & Transfers Document Management

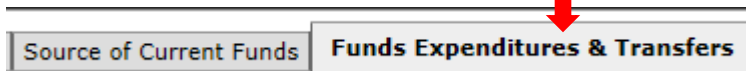
Budget Request Summary

Layout Code: PS OPS PLAN Layout Type: Generic  Request Code: 513 OP PLAN FY2018 Request Name: Troy Univer Form 20 Stage: 1  
 Department: 513

Display Sub Total:  Select Model:

Summary	Line	Budget Object	UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
<input type="checkbox"/>	1	7001 R	46,858,238		46,858,238
<input type="checkbox"/>	2	7023 R	250,000		250,000
<input type="checkbox"/>	3	7033 R	122,886		122,886
<input checked="" type="checkbox"/>	4	7024 R	250,000		250,000
	<b>Totals:</b>		<b>-47,481,124</b>	<b>0</b>	<b>-47,481,124</b>

## FUNDS EXPENDITURES & TRANSFERS

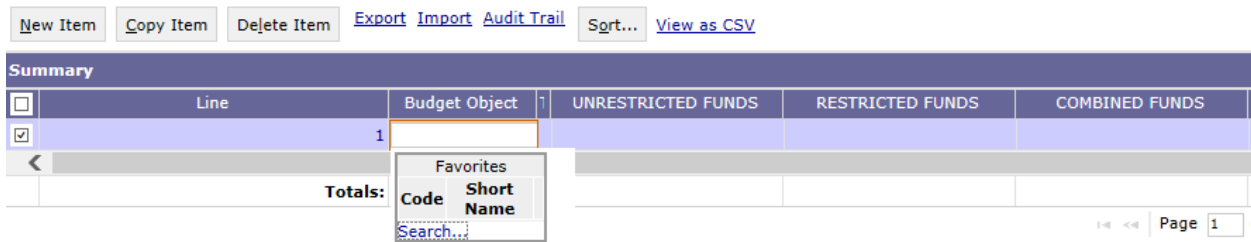


**Step 1.** Select the **Funds Expenditures & Transfers** tab.

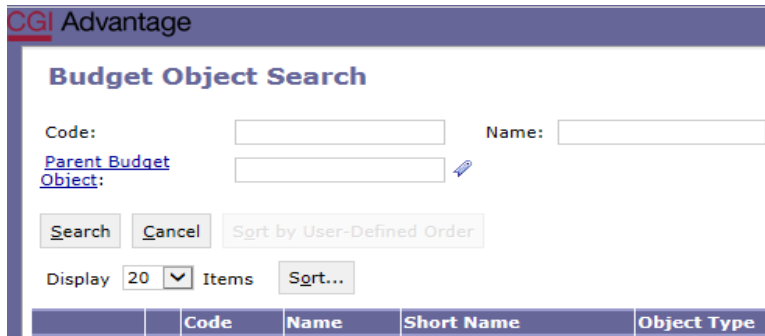
**Step 2.** Click **New Item** to insert a line to add unrestricted and restricted funds for the first Budget Object expense line.



**Step 3.** To determine what line of funding to report on each line, right click in the **Budget Object** field. Then click **Search**.



**Step 4.** The **Budget Object Search** screen will appear. Click **Search** again.



The **Budget Object Search** screen will open with the list of budgeted E&G expenditures.

**CGI Advantage**

### Budget Object Search

Code:  Name:  Object Type:  \* E  
 Parent Budget Object:  Short Name:  It  
 Object:  Name:  Ty

Display  Items

	Code	Name	Short Name	Object Type	Elem
Select	6160	Mandatory	E&G Trans-Mand	Expense	COA
Select	6161	Non Mandatory	E&G Tran-NonMan	Expense	COA
Select	6300	Instruction	E&G-Instruction	Expense	COA
Select	6301	Research	E&G-Research	Expense	COA
Select	6302	Public Service	E&G-Pub Serv	Expense	COA
Select	6303	Academic Support	E&G-Acad Supp	Expense	COA
Select	6304	Student Services	E&G-Stud Srvc	Expense	COA
Select	6305	Institutional Support	E&G-Inst Supp	Expense	COA
Select	6306	Operation and Maintenance of Physical Plant	E&G-O&M Phy Plt	Expense	COA
Select	6307	Scholarships and Fellowships	E&G-Schol&Fell	Expense	COA

**Step 5.** Select the appropriate code for each line. Follow steps 2-4 to complete Form 20 revenues for the institution.

**Step 6.** Click **Save** to review the Combined Funds (totals). **Action was Successful** message will also appear along with the Combined Funds

Edit Budget Request | Source of Current Funds | **Funds Expenditures & Transfers** | Document Management

Budget Request Summary

Layout Code: PS OPS PLAN Layout Type: Generic Request Code: 513 OP PLAN FY2018 Request Name: Troy Univer Form 20 Stage: 1  
 Department: 513

Display Sub Total:  Select Model:

Summary						
<input type="checkbox"/>	Line	Budget Object		UNRESTRICTED FUNDS	RESTRICTED FUNDS	COMBINED FUNDS
<input type="checkbox"/>	1	6160	E	2,564,536	210,056	2,774,592
<input type="checkbox"/>	2	6300	E	846,245	256,203	1,102,448
<input checked="" type="checkbox"/>	3	6301	E	5,000,000	5,000,000	10,000,000
<b>Totals:</b>				<b>8,410,781</b>	<b>5,466,259</b>	<b>13,877,040</b>

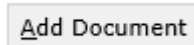
## DOCUMENT MANAGEMENT TAB

*All reports created in infoAdvantage will need to be attached in the appropriate form using the following steps.*

**Step 1.** Select the **Document Management** tab.

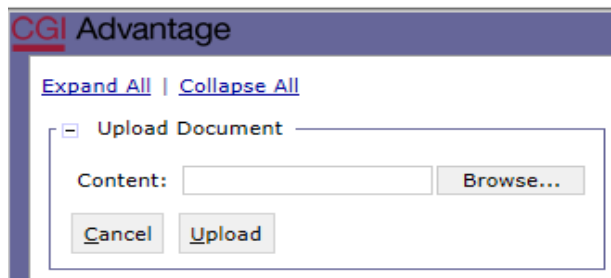


**Step 2.** Click **Add Document**.

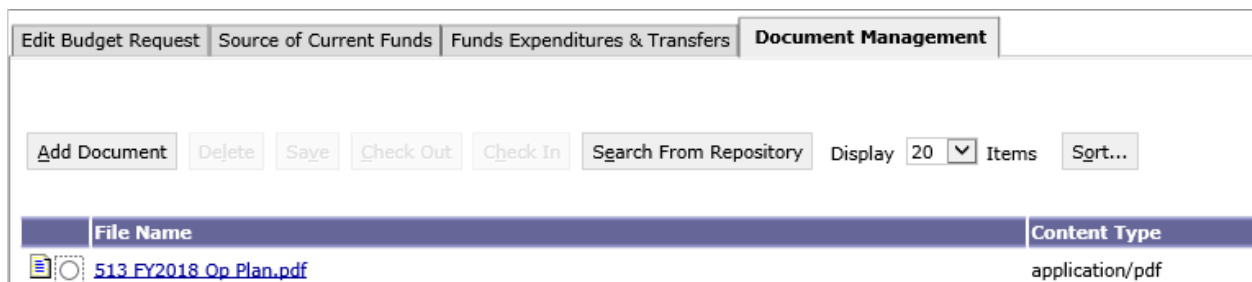


The following screen will display.

**Step 3.** Click **Browse** to locate your saved files. Select your file which will populate in the Content: box.



**Step 4.** Click **Upload**. As your documents are attached to the form, they will display below.




**NOTE:** Please be sure to include ALL documentation required for the Operations Plan: program change letters, grants, etc.

Please use a similar format for naming these additional documents, examples:

FY 19 Op Plan Program Change Letter

FY 19 Op Plan Grant Award Letter

**Step 5.** When all required forms have been attached in the **Document Management** tab, click on the **Edit Budget Request** tab.

**Step 6.** Once complete click **Save**  at the top of the page. **Documents are successfully saved to database** message will appear.

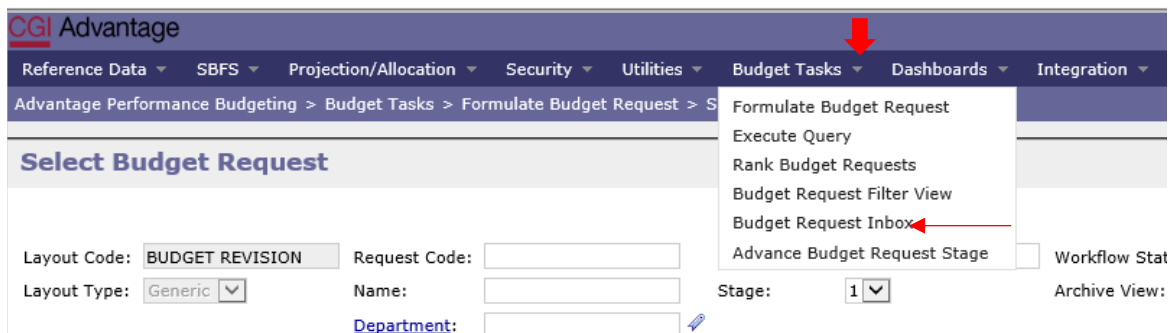


**Step 7.** Click **Back**  then Continue to exit out of the form.



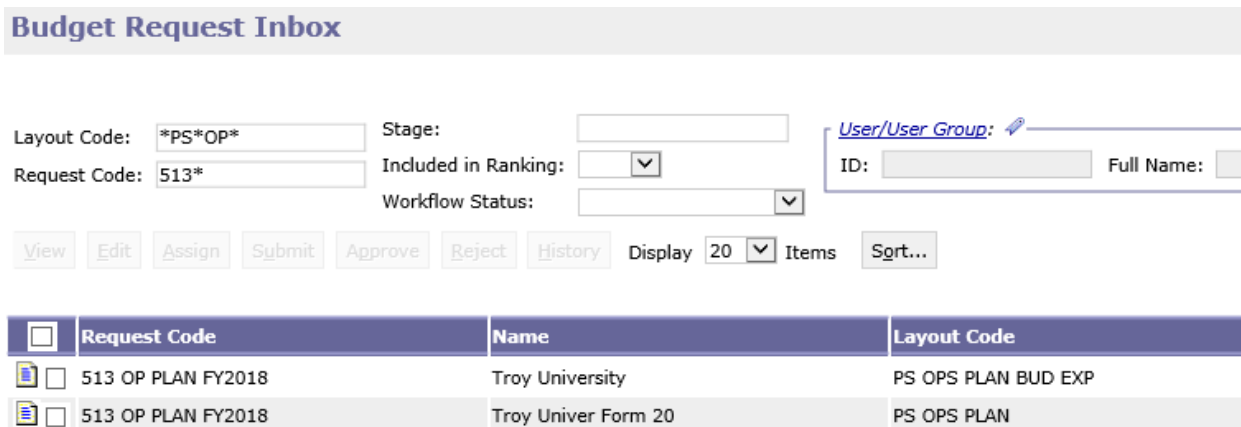
## SUBMISSION

To submit the final Operations Plan packet return to the **Budget Tasks** drop down menu.



**Step 1.** Select **Budget Request Inbox**. The **Budget Request Inbox** will display.

**Step 2.** Select the Op Plan forms to be submitted. Note the action buttons that light up: View, Edit, Assign, Submit and History.

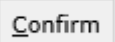


**Step 3.** Click **Submit**. The following screen displays, allowing you to add comments for the 1<sup>st</sup> Approver.

**Submit Budget Request**

Comments: Please approve the institution's Operations Plan

Confirm    Cancel

**Step 4.** Click [Confirm](#).  You will be taken back to the **Budget Request Inbox** and receive a message that the Operations Plan was **Successfully Submitted** to the 1<sup>st</sup> approver.

## WORKFLOW

The 1<sup>st</sup> approver will receive an email. The email will include the comment (if provided) along with a link to STAARS Performance Budgeting.

Please approve the Operations Plan [https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT\\_endState=%2F%2FBudgetInstance%2FMaintenance&code=332%20OP%20PLAN%20321%200166&EVENT\\_transition=budgetFormEmailQuery&layoutType=G&layoutCode=OPERATIONS%20PLAN](https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=332%20OP%20PLAN%20321%200166&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=OPERATIONS%20PLAN)

**Step 1.** Clicking the link will open the log-in page for PB. The 1<sup>st</sup> approver will need to open their **Budget Request Inbox** under **Budget Tasks**.

**Step 2.** The 1<sup>st</sup> approver will need to **select the Operations Plan Form 8s**.

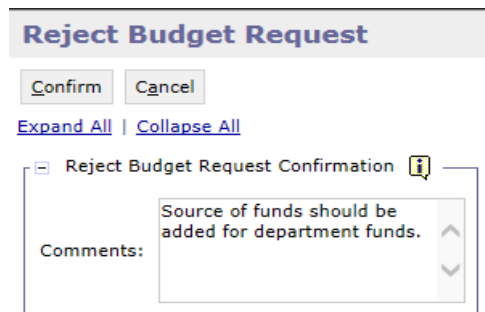
<input checked="" type="checkbox"/>	Request Code	Name	Layout Code	Stage
<input checked="" type="checkbox"/>	513 OP PLAN FY2018	Troy University	PS OPS PLAN BUD EXP	1
<input checked="" type="checkbox"/>	513 OP PLAN FY2018	Troy Univer Form 20	PS OPS PLAN	1

**Step 3.** To review the operations plan, click **View**.

**Step 4.** After review, if the documents require editing, the 1<sup>st</sup> approver will need to click **Reject**.

The following screen will appear.

**Step 5.** Use the **Comments** section to describe why the documents were rejected.

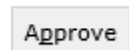


The screenshot shows a dialog box titled "Reject Budget Request". At the top, there are two buttons: "Confirm" and "Cancel". Below the buttons are two links: "Expand All" and "Collapse All". The main content area is titled "Reject Budget Request Confirmation" and contains a "Comments:" label followed by a text input field. The text in the input field reads: "Source of funds should be added for department funds." There are up and down arrow icons on the right side of the input field.

**Step 6.** Click **Confirm**. This will send the budget revision back to the person that submitted it to the 1<sup>st</sup> approver. The submitter will receive an email that includes the comment and a link to STAARS Budgeting to open the document and make the necessary corrections.

**NOTE:** The submitter should make the required changes in STAARS Budgeting, rerun the reports in infoAdvantage and attach updated error reports (with no mismatch message) using the **Document Management** tab. The process should take place anytime corrections are to be made for a Budget Request, Operations Plan or Budget Revision. Then, the submitter can resubmit the packet(s) to the 1<sup>st</sup> approver.

**Step 7.** Once the 1<sup>st</sup> approver receives the corrected Operations Plan, reviews and determines that the packet is satisfactory, the 1<sup>st</sup> approver can now approve the Operations Plan by clicking **Approve**.




A single button labeled "Approve".

**Step 8.** The **Approve Budget Request** screen displays allowing for **Comments** to be sent to the 2<sup>nd</sup> approver.



The screenshot shows a dialog box titled "Approve Budget Request" within the "CGI Advantage" application. At the top, there are two buttons: "Confirm" and "Cancel". Below the buttons are two links: "Expand All" and "Collapse All". The main content area is titled "Approve Budget Request Confirmation" and contains a "Comments:" label followed by a text input field. The text in the input field reads: "Thanks for adding the Source of Funds. Op Plan Approved." There are up and down arrow icons on the right side of the input field.

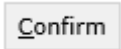
**Step 9.** Click **Confirm**  to approve the budget revision.

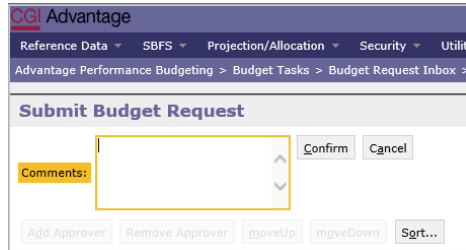
**NOTE:** The Operations Plan will stay in 1<sup>st</sup> approver's inbox until this approver also submits the revision to the 2<sup>nd</sup> approver.

**Step 10.** The 2<sup>nd</sup> approver will receive an email notification with a link to STAARS Performance Budgeting to login and approve.

**Step 11.** To submit the Operations Plan to the 2<sup>nd</sup> approver, select the Operations Plan again, then click

**Submit.**  The **Submit Budget Request** screen displays.

**Step 12.** Click **Confirm**  to submit the Operations Plan.

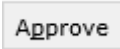


**Step 13.** You will return to the **Budget Request Inbox** and a message displays that the Budget Revision was **Successfully Submitted**. The 2<sup>nd</sup> approver receives an email in Microsoft Outlook indicating that the packet has been submitted.

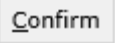


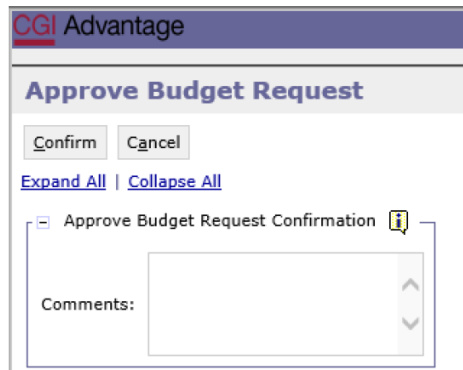
### **ADDITIONAL OPTION - REJECTED**

The 2<sup>nd</sup> approver also has the options, to View, Approve, or Reject a form. If rejected, the form(s) are returned to the 1<sup>st</sup> approver. After the 2<sup>nd</sup> approver has reviewed the form, the form(s) are ready to approve and submit to the Executive Budget Office.

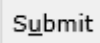
**Step 14.** Select the form(s), then click **Approve.** 

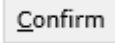
The **Approve Budget Request** screen displays, allowing for **Comments**.

**Step 15.** Click **Confirm**  to approve the form(s).



**NOTE:** The form(s) remains in the 2<sup>nd</sup> approver's **Budget Request Inbox** until it is submitted to the Executive Budget Office.

**Step 16.** Select the form(s), then click **Submit**.  The **Submit Budget Request** screen displays.

**Step 17.** Enter any desired **Comments** for the Executive Budget Office, then click **Confirm**. 

**Step 18.** You will return to the **Budget Request Inbox** and should have a message that the revision was **Successfully Submitted**.

The process to Submit has been Completed!

**NOTE:** If rejected by the Executive Budget Office, the forms(s) will be returned to the 2<sup>nd</sup> approver for corrections. The 2<sup>nd</sup> approver will need to make the required changes, regenerate the reports in infoAdvantage and re-submit the form(s).