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.
Quarterly Performance Report (Targets)

I. 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.

**Create Budget Request**

- Request Code: 
- Name: 
- Stage: 
- 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 2020

DEPARTMENT NUMBER: 069 QPRT

CURRENT FISCAL YEAR: 2020

**NAME:** 069 QPRT 2020
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 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. Enter your Agency number and asterisk * in Code Box. Click Search for the list of targets to appear. Click Select for the target(s) to add on the beginning of the year QPR report.
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.

<table>
<thead>
<tr>
<th>PM Obj</th>
<th>Unit</th>
<th>Quarter 1 Target</th>
<th>Quarter 2 Target</th>
<th>Quarter 3 Target</th>
<th>Quarter 4 Target</th>
<th>Annual Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>069-01</td>
<td>Percentage</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>069-02</td>
<td>Percentage</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>069-03</td>
<td>Number</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>12</td>
</tr>
</tbody>
</table>

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.

Proceed to page 12 for instructions on submission of information.

DO NOT SUBMIT TO EBO THROUGH WORKFLOW IN PB
II. ACTUALS

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 Q1 ACTUALS.
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 2020
- **NAME:** 1st Quarter 2020

**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.

<table>
<thead>
<tr>
<th>Line</th>
<th>PM Obj</th>
<th>Unit</th>
<th>First Quarter Target 2016</th>
<th>Quarter 1 Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>005-01</td>
<td>Dollars</td>
<td>28,500,000</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td>28,500,000</td>
<td></td>
</tr>
</tbody>
</table>

**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:

1. **Enter Department(s) Number:** 3-digit Agency Number
2. Run Report for CY:
   a. For quarterly reporting input CY (Current Year) in the prompt.
3. Enter Performance Plan Code: 20** STATEWIDE AL

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 you should EXPORT the report as a PDF and save the report to your PC. 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. Click Advanced
2. Enter Department(s) Number: 3-digit Agency Number
3. Run Report for CY or FY:
   a. For Operations Plan Targets submissions input FY (Future Year) in the prompt.
   b. For regular quarterly reporting input CY (Current Year) in the prompt.

Quarterly (4) Submissions throughout the Fiscal Year

EBO will continue to send out reminders when it’s time for agencies to input quarterly targets actuals. 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 TARGETS at the beginning of the Fiscal Year.

**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**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Unit of Measure</th>
<th>First Quarter</th>
<th>Second Quarter</th>
<th>Third Quarter</th>
<th>Fourth Quarter</th>
<th>Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase number of students who earn a short-term or long-term certificate, degree, or an industry recognized credential</td>
<td>Percentage</td>
<td>01</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Increase the number of individuals served in Adult Education</td>
<td>Percentage</td>
<td>02</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Conduct peer reviews at two ACCS institutions will identify best practices, efficiencies, and opportunities</td>
<td>Number</td>
<td>03</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
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.

III. MISSION/VISION

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

Step 2. From the Performance Budgeting screen, select Performance Missions.
The **Performance Missions Maintenance** screen will appear.

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

**Step 4.** Select the code for your department to review the information in the performance hierarchy. Click **VIEW or EDIT** (for changes).

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

III. 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**.

**Performance Goals Maintenance**

<table>
<thead>
<tr>
<th>Code:</th>
<th>Name:</th>
<th>Search</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>New</th>
<th>Edit</th>
<th>Delete</th>
<th>Save</th>
<th>View</th>
<th>Display</th>
<th>Items</th>
<th>Sort...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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](image)

**IF YOU NEED TO MAKE CHANGES TO ANY GOALS, CONTACT EBO.**

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

![Performance Goal View](image)

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

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Short Name</th>
<th>Element Type</th>
<th>Object Type</th>
<th>Parent Budget Object</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Performance Measure</td>
<td></td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>069-001</td>
<td>Provide a Skilled Workforce</td>
</tr>
<tr>
<td>069-002</td>
<td>Increase the number of individuals served in Adult Education</td>
</tr>
<tr>
<td>069-003</td>
<td>Conduct Peer Reviews at 12 Aces Institutions</td>
</tr>
</tbody>
</table>

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

**If additional performance measures need to be added, contact the EBO.**

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