



Budget Formulation and Management (BFM)

End User Guide – Quarterly Performance Report (QPR) Forms



State of Alabama

Contents

- 1. Quarterly Performance Report (QPR) Forms..... 3
 - 1.1. Mission, Goals, and Performance Measure Updates 3
 - Mission and Vision..... 3
 - Goals – Updating Existing Goals 4
 - Goals – Creating New Goals 4
 - Performance Measures – Updating Existing Performance Measures 5
 - Performance Measures – Creating New Performance Measures 6
 - 1.2. QPR Targets and QPR Actuals Updates 7
 - QPR Targets..... 7
 - QPR Actuals 9
 - 1.3. Updating form data using Export/Import Excel functionality..... 10
 - 1.4. QPR Report..... 11

Budget Form Instructions

1. Quarterly Performance Report (QPR) Forms

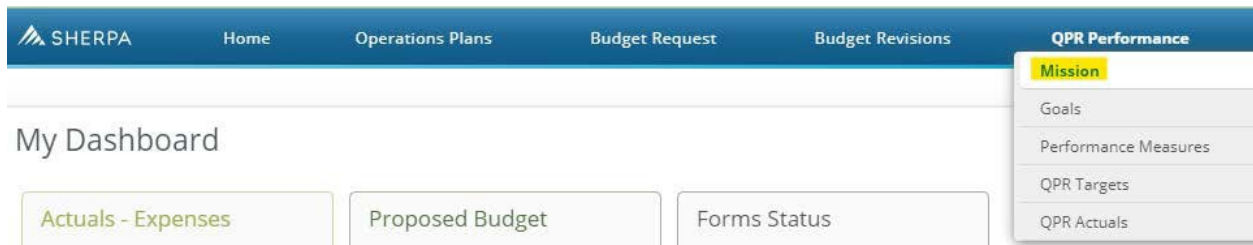
The Quarterly Performance Report (QPR) is used by state agencies as a tool for planning and documenting performance. Each state agency/department is required to submit a performance report. All QPR forms can be found in BFM under the 'QPR Performance' Menu header.

1.1. Mission, Goals, and Performance Measure Updates

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

Mission and Vision

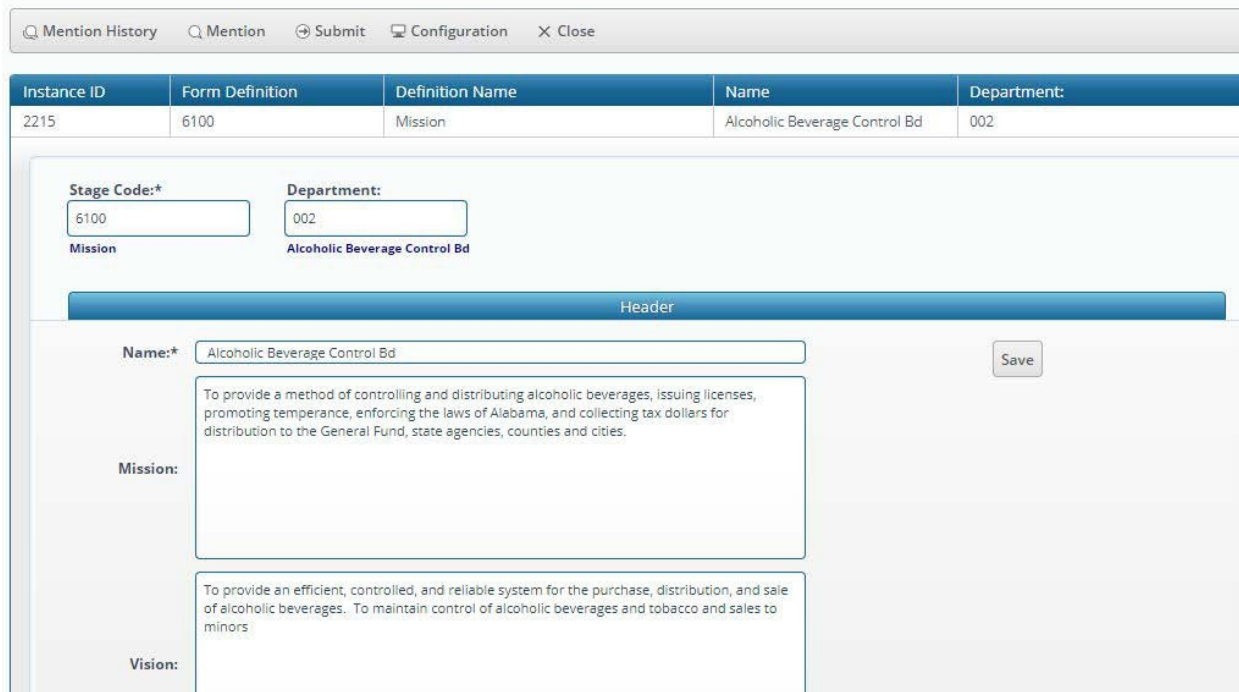
1.1.1. After logging into BFM, begin by hovering over 'QPR Performance' on the header menu, and then select 'Mission'.



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

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

Budget Form Header



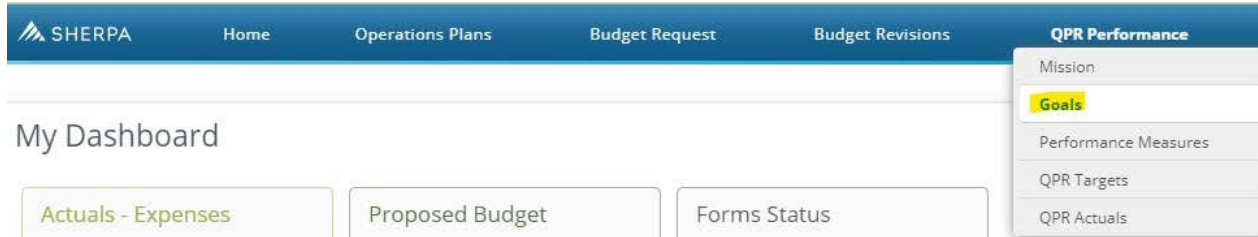
The screenshot shows the 'Budget Form Header' page. At the top, there is a search bar with 'Mention History', 'Mention', 'Submit', 'Configuration', and 'Close' options. Below the search bar is a table with the following columns: Instance ID, Form Definition, Definition Name, Name, and Department. The table contains one row with the following data: Instance ID: 2215, Form Definition: 6100, Definition Name: Mission, Name: Alcoholic Beverage Control Bd, Department: 002. Below the table, the 'Header' section is expanded, showing a form with the following fields: Stage Code:* (6100), Department:* (002), Name:* (Alcoholic Beverage Control Bd), Mission: (To provide a method of controlling and distributing alcoholic beverages, issuing licenses, promoting temperance, enforcing the laws of Alabama, and collecting tax dollars for distribution to the General Fund, state agencies, counties and cities.), and Vision: (To provide an efficient, controlled, and reliable system for the purchase, distribution, and sale of alcoholic beverages. To maintain control of alcoholic beverages and tobacco and sales to minors). A 'Save' button is located to the right of the form.

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

1.1.5. Click 'Save' to save changes.

Goals – Updating Existing Goals

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



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

Goals

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

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

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

Budget Form Header

1.1.10. Click 'Save' to save changes.

Goals – Creating New Goals

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

Goals

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

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

Create a new Budget Form - 6000

X Close

Stage:* 6000 - Goals

Department: 003 Banking

Name:* TEST GOAL - % of X

Save Cancel

1.1.13. Click 'Save'.

Budget Form Header

Mention History Mention Submit Close

Instance ID	Form Definition	Definition Name	Name	Department
6350	6000	Goals	TEST GOAL - % of X	003

Stage Code:* 6000 Goals

Department: 003 Banking

Header

Name:* TEST GOAL - % of X

Description: TEST GOAL description

Legacy Code:

Save

Active?:

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

Performance Measures – Updating Existing Performance Measures

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

SHERPA Home Operations Plans Budget Request Budget Revisions QPR Performance Links

QPR Targets

+ Add New Create Budget Forms Screen Configuration Action Configuration

ID	Name	Stage Code	Stage Name	Deapar	Rows	Last Update				
591R	Agriculture & Industries	6401	Initial	001	325	4/17/2024	brvan.reed@che	Submit	Header	Detail

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

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

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

associated goal (click on magnifying glass to search).

Budget Form Header

Mention History Q Mention Submit X Close

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

Stage Code:* Department:
Performance Measures Agriculture & Industries

Header

Name:*

Description:

Unit:

Active?:

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

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

1.1.19. Click 'Save' to save changes.

Performance Measures – Creating New Performance Measures

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

Performance Measures

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

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

Create a new Budget Form - 6200

X Close

Stage:*

Department:
Corrections

Goals:
Optimize inmate healthcare spending to limit ann

Name:*

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

and associated goal if needed.

Budget Form Header

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

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

Name:

Description:

Unit:

Active?:

Goal:

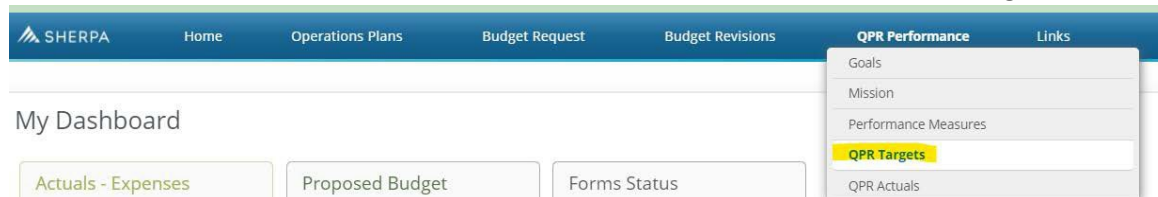
001-GOAL-023-Pesticide Residue Lab Other

1.1.23. Click 'Save' to save changes.

1.2. QPR Targets and QPR Actuals Updates

QPR Targets

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



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

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

QPR Targets

* Create Budget Forms

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

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

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

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

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

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

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

ID	Form	Department:
5998	6400	003 - Banking

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

Form ID	Form Definition
5998	6400

Department: 003
Performance Measures: 003-003

Description:

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

QPR Actuals

- 1.2.7. Hover over 'QPR Performance' on the header menu, and then select 'QPR Actuals'.
- 1.2.8. On the 'List Page', you will see the QPR Target Actuals forms to which you have access based on your security.
- 1.2.9. Click on 'Detail' in the row you would like to edit.
- 1.2.10. In the detail screen, double-click on any line to update the editable columns.

QPR Actuals

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

Row	Audit Trail	Performance Measure	PM Name	Quarter 1 Target	Quarter 1 Actuals	Quarter 2 Target	Quarter 2 Actuals	Quarter 3 Target	Quarter 3 Actuals	Quarter 4 Target	Quarter 4 Actuals	Annual Target	Annual Actuals	Description
1		003-001	To Examine Banks	11	6	7	<input type="text" value="0"/>	9	<input type="text" value="0"/>	9	<input type="text" value="0"/>	36	<input type="text" value="0"/>	
2	<input type="button" value="Q"/>	003-002	Maintain Fund Balance	0	0	0	0	0	0	0	0	25	0	
3	<input type="button" value="Q"/>	003-003	To Address Consumer Complaints Within 30 Days	30	28	30	0	30	0	30	0	30	0	

Records per page: 50 Records: 1 - 3 of 3 - Pages: (16) (44) 1 (38) (28)

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

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

QPR Actuals

ID	Form	Department
6167	6700	003 - Banking

Row	Audit Trail	Performance Measure	PM Name
1	<input type="button" value="Q"/>	003-001	To Examine Banks
2	<input type="button" value="Q"/>	003-002	Maintain Fund Balance
3	<input type="button" value="Q"/>	003-003	To Address Consumer Complaints Within 30 Days

Records per page: 50

Budget Form Entry - Add New Line

Form ID	Form Definition
6167	6700

Department: Banking **Performance Measures:** To Address Consumi

Description:

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

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

Budget Form Header

Mention History Mention Submit Configuration Close

Instance ID	Form Definition	Definition Name	Name	Department:
	Header	QPR Actuals	Attachments	System Maintained

Name: Save

Question 1: How have policy and budget decisions made by the governor and legislature in the current FY affected your agency in meeting accomplishments and services?

Answer:

Question 2: What administrative improvements did your agency make in the current FY and what potential improvements do you see for the future years? Include suggested changes in legislation or administrative procedures which would aid your agency in these improvements.

Answer:

1.3. Updating form data using Export/Import Excel functionality

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

QPR Actuals

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

Close Add New Copy **Export** Import Refresh

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

Records per page: 50 Advanced Search

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

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

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

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

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

Budget Form Import

X Close ✓ Validation Results

Browse C:\fakepath\Book1.xlsx

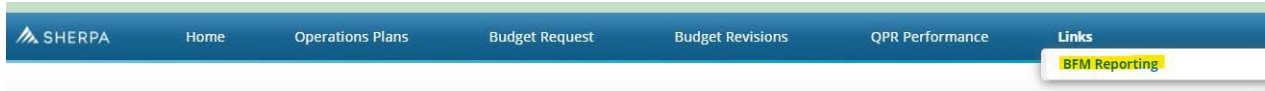
Load File

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

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

1.4. QPR Report

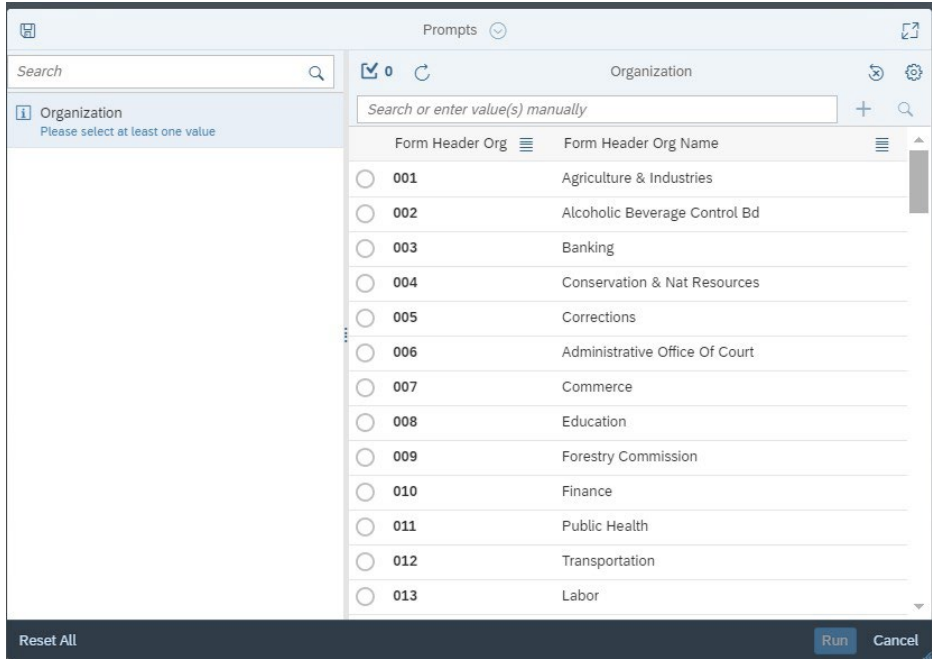
1.4.1. To access the QPR report, navigate to Links > BFM Reporting.



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


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

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



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

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



State of Alabama

Quarterly Performance Report

Department: 003 - Banking

Mission: To charter, license, and regulate Alabama banks and other financial services providers in an efficient and effective manner that will foster stability, instill public confidence, and promote economic development in a competitive environment.

Vision: To ensure a financial services environment that is stable, safe, and growing by consistently providing quality regulation which protects the interests of depositors, customers, sha

Annual Goals

003-GOAL-001 To attempt to prevent bank failures by examining banks within the legally required timeframe

003-GOAL-002 Maintain adequate reserves to continue operations in the event of a substantial(more than 15%) loss of revenue

003-GOAL-003 Address consumer issues within 30 days

003-GOAL-004

003-001 - To examine banks

PM Goal	Unit	Target Q1	Actuals Q1	Target Q2	Actuals Q2	Target Q3	Actuals Q3	Target Q4	Actuals Q4	Annual Target	Annual Actuals
001	Number of Banks to be Examined	11	6	7	0	0	0	0	0	30	0

003-002 - Maintain fund balance

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

003-003 - To address consumer complaints within 30 days

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

Quarterly Performance Report

Go To < < 1 of 1+ > > 🔍 📄 🔄

Refresh Date/Time: 4/18/24 @ 11:57:06 AM