

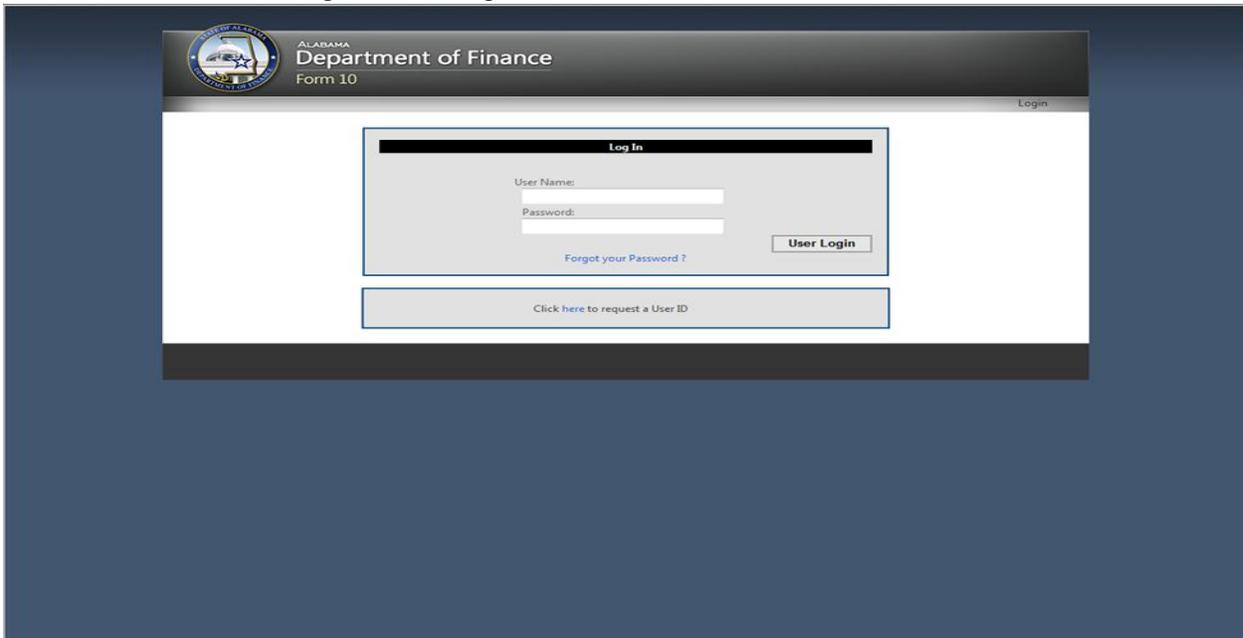
User Guide for the Quarterly Performance Report Web Application (FORM 10)

Overview

The Quarterly Performance Report (referred to hereafter as QPR) 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 into their QPR. 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 a new web application titled “Quarterly Performance Report (FORM 10)”. This guide will walk users through the login procedures and the steps necessary to input annual and quarterly data into the web application.

General Instructions

1. Logging in: From the home page of the Executive Budget Office web site (www.budget.alabama.gov), click on Document and Forms in the task bar.



Select Quarterly Performance Report (Form 10). When the login page appears, type in your username and password and press enter. Your user name and password will be the same one that you have used to complete the other online budget forms. If you are a new user, click on the Link to request a User ID.

2. Navigating: Once you log in, a menu page will appear that will allow you to select your agency. Across the tool bar you will see Home, Quarters, and Reports. These allow you to move through the pages of the applications.

Once the mission and vision has been properly entered and saved, the Goals and corresponding Objectives will allow you to input target and actual data

for each quarter of the fiscal year. The Reports page will allow the user to view a PDF copy of their completed online form, but will not allow the user to edit the information.

3. Inputting Initial Data (Mission-Vision-Goals-Objectives-Target Data): The first time that users submit data into the new Form 10, no fields will be pre-populated with information. However, in future years, user's reports will be prepopulated with the previous year's Mission, Vision, Goals and Objectives. Target and Actual data for previous year's Objectives will not be rolled over. Users can choose to keep the previous year's Objectives and submit new targets and actuals, or delete the previous year Objectives and submit new ones. **Initial data submission into QPR reports for each new fiscal year is allowed during the first quarter, between October 20th and November 20th each year.**

To input data into a text field, simply click your mouse inside of the text box and begin typing. Data should be entered into the online form in the following order:

- i. Enter Agency Mission ("Mission" should represent the purpose of the Agency)
- ii. Enter Agency Vision (Agency "Vision" should reflect the long term goal of where the agency would like to be if all annual goals and objectives are met)
- iii. Enter an Annual Goal. Each goal will be saved using the "add" link and will automatically be given a number.
- iv. Next, click "Add Objective" next to the Goal and enter an objective for that goal in the text box. You will be asked to include the unit of measure used to measure each Objective, along with quarterly and annual target data.
- v. Quarterly and Annual Targets should be added prior to the beginning of each fiscal year for each Objective.

- vi. After inputting an Objective and Its corresponding measurement information, click Save Objective to save the data you have just entered.
 - vii. At this point, you can choose to either select “Back to Goals” to enter another goal, edit or delete an Objective, “View Agency Report” to see a sample PDF version of the report, Or “Submit Final Goals and Objectives”.
 - viii. When all Goals-Objectives-Target data have been entered, click the “Submit Final Goals and Objectives” to complete the process. You should receive notification that your data has been submitted. At that point you can log out of the system.
4. Inputting Actual Quarterly Results for Each Objective: **Actual data should be entered by the 15th day of the month following the end of each fiscal year quarter. For example, actual data for the 4th quarter of 2012 would be reported by October 15.**
- i. Log into the online system and select “Quarters” from the menu bar and select the appropriate quarter for which you will be reporting actual data.
 - ii. Click “Edit” and submit the actual performance data for each specific Objective.
 - iii. Once you have completed submitting all actual data for a quarter, click the submit button. Clicking Submit will notify the Executive Budget Office that your information has been submitted into the system.
 - iv. The quarterly target data previously submitted will be locked, allowing only actual data to be submitted at this time.
5. Reviewing your work: Click on the Reports link at the top of the application to review or print a copy of data that has been submitted. Close the report and return to the data entry fields or exit the application when you have completed your review. Below is an example of a Form 10 Quarterly Performance Report:

Fiscal Year 2012 Quarterly Performance Report													
Agency:		001 - AGRICULTURE & INDUSTRIES											
Mission:		To provide an abundant and safe agriculture for the state of Alabama.											
Vision:		To lead the way in growth, safety, and productivity.											
Annual Goals													
		1	To provide: Supervisory, personnel, legal, information technology, financial, public relations, and general services to all departmental programs and personnel.										
		2	Maintain the total number of internal and external audits performed by Auditing staff through FY 13.										
		3	To assure safe food, ethical pest control practices, quality petroleum products and accurate weighing.										
Quarterly Objectives and Targets													
			First Quarter		Second Quarter		Third Quarter		Fourth Quarter		Annual		
Performance Objectives		Goal	Unit of Measure	Target	Actual	Target	Actual	Target	Actual*	Target	Actual	Target	Actual*
1	The number of Executive Administration activity regulatory action units.	1	Spending / # of regulatory action units	75	50	60	76	55				257	300
2	Petroleum commodities inspection fee reports to be received.	1	Number of regulatory action units.	50	45	52	54	35				200	194
3	Increase # of audits per auditor due to attrition.	2	Number of audits/auditor	15	14	15	16	15		15		60	
4	Maintain accurate and thorough testing with less staff.	3	Count of correct tests	30	32	45	44	50		60		225	
* Actual performance data is not available for this quarter.													
Notes													
	Objective Number												
	1	This is a made up item.											
	1	Consider this item to be true.											
	2	Currency will be in U.S. dollars (\$).											
	3	Due it write the ferst tyme!											

5. Submitting your work: Once you have completed submitting the appropriate data and reviewed your agencies' example QPR, there are no further actions that are required at this time. A hard copy of your report does not need to be submitted to the Executive Budget Office. The Budget Office will be able to retrieve your agency's report from the web application.

6. Locking and Unlocking Fields: Shortly after the beginning of each Fiscal Year, the Objective and Target fields for the new fiscal year QPR will be locked. Additionally, approximately 1 month after the end of each fiscal quarter, the Actual fields will be locked. If a user was unable to submit actual data before that time, or entered incorrect data one of the fields, the user should contact the web application administrator at the Executive Budget Office to have their report's field unlocked.