



California County Budget Departments

California counties speed up their budget development process with solutions based on Adobe® FrameMaker®, Adobe Acrobat®, and PatternStream® software from Finite Matters Ltd.

Profile

- California counties provide the public with a wide array of services through their departments and through partnerships with public, private, and nonprofit agencies.
- As part of a county government's overall financial plan, annual budgets are prepared to present the county's financial capacity and priorities in providing social, environmental, public health, safety, and regional planning services for its residents.

Solution

- Adobe Acrobat
- Adobe FrameMaker
- PatternStream software from Finite Matters Ltd.

Benefits Summary

- PatternStream software automatically extracts budget information from various databases and populates a FrameMaker template, saving days of labor.
- The PatternStream and FrameMaker solution has cut the typical time to incorporate revisions in a 500-page document from two days to six hours for Orange County.
- PatternStream automatically creates an Adobe PDF file that maintains exact fidelity with the FrameMaker file and can be printed or published electronically.
- FrameMaker reliably handles long, complex documents such as county budgets.

County budgets provide taxpayers with a detailed spending plan for everything from the sheriff's department to county services such as hospitals and parks. The documents can be as long as 800 pages and contain detailed spending analyses as well as charts illustrating growth and service needs. Created annually, budget documents undergo numerous labor-intensive revisions before they are finalized by elected officials, department managers, and, in some cases, the general public.

The Challenge

A key issue in the budget development process is to efficiently combine multiple components—numbers, spreadsheets, charts, and text narratives—into a single document. Another is to quickly and inexpensively distribute preliminary budgets to reviewers, including elected officials, nonprofit organizations, and community leaders.

In the past, Orange County created its budget workbooks for public hearings using a word processing program and macros. The problem was time. Reviewers often had last-minute changes, and revising a 500-page budget often took two people two full days. Another problem was the stability of the word processing program as documents became more complex and more heavily formatted. In another large California county, analysts used to prepare budgets manually, typing information directly into Adobe FrameMaker files or cutting and pasting from other applications. These manual tasks slowed the budget preparation process.

Adobe Solution

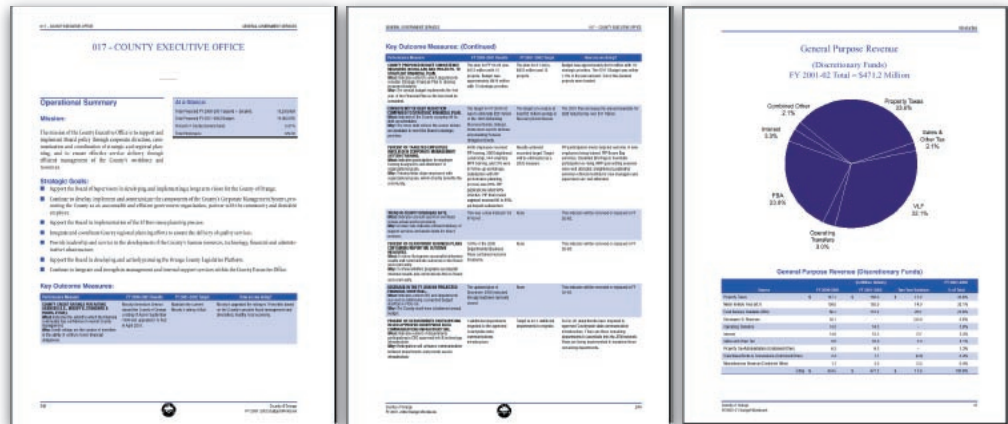
Orange County and another large California county are saving time and labor with an automated database publishing solution. The technology: Adobe FrameMaker and Adobe Acrobat software that is tightly integrated with PatternStream software from Finite Matters Ltd. (FML), a developer in the Adobe Solutions Network.

First, the counties created Adobe FrameMaker templates that defined the format of budget documents, including character, paragraph, and table styles. Next, the counties called on FML to set up a PatternStream template, which specifies what information to extract; where information should appear in the FrameMaker document; and whether it should be placed in a text string, table, text frame, or image frame. Using the templates, a document author simply clicks a button in the PatternStream interface to pull in numbers, charts, and text from various sources. The data automatically populates the FrameMaker template, creating hundreds of pages in a matter of hours. For simple formatting changes, an analyst edits the FrameMaker file directly. When budgets are revised, the analyst makes the change in the database and simply republishes.

The PatternStream software uses Adobe Acrobat in the background to create an Adobe Portable Document Format (PDF) file at the same time it creates the FrameMaker file. The Adobe PDF file can be printed or published electronically and maintains fidelity with the original FrameMaker file, the active hyperlinks for indexes, the table of contents, and internal and external Web links. Both counties distribute materials on paper and CD-ROM, as well as over the Web.



California counties streamline publishing of budget documents



“We previously spent three weeks checking numbers and assembling the budget document. By shaving a week off the process, the Adobe and PatternStream solution allows us to devote more time to the issues behind the numbers.”

Mitch Tevlin
Manager of budget development services
Orange County, California

Summary

By spending less time preparing budget documents, analysts can spend more time on the issues behind the numbers. With PatternStream, analysts at Orange County’s Budget Office can replace an outdated budget workbook of 500+ pages within six hours, and FrameMaker reliably handles the long documents. The automated process is much faster and results in more consistent formatting. Analysts write narrative descriptions and justifications for budget items in an in-house intranet application; budget data resides in a SQL database. With a click of a button, PatternStream marries the two into a new FrameMaker document. For the other California county, PatternStream and FrameMaker have centralized and standardized budget documents, allowing them to be created about 30% faster.

Both counties are benefiting from their new processes for publishing budget information. From the public’s point of view, the searchability of Adobe PDF files is an advantage for constituents who want to research county budgets.

Toolkit

- Adobe Acrobat
- Adobe FrameMaker
- Finite Matters PatternStream
- Microsoft SQL database

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