Orange County and Santa Clara County, California

Counties speed up budget development process with database publishing solution based on Adobe FrameMaker, Adobe Acrobat, and PatternStream® software from Finite Matters Ltd.

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 can 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. Now California's Orange County and Santa Clara County are saving time and labor with an automated data-base 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.

Automated database publishing

A key challenge in the budget development process is to efficiently combine multiple elements—numbers, spreadsheets, charts, and text—into a single document. Another is to quickly and inexpensively distribute preliminary budgets to reviewers, including elected officials, non-profit organizations, and community leaders. Orange County and Santa Clara County have overcome both challenges with a solution from Adobe and FML.
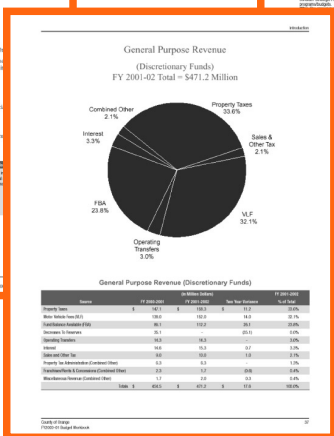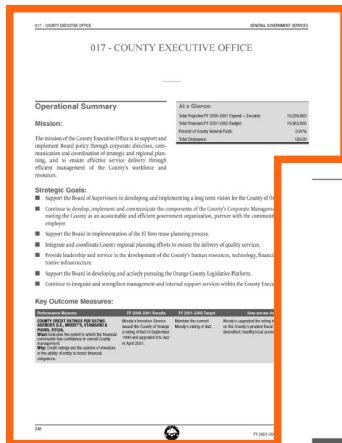
First, the counties created Adobe FrameMaker templates that define the format of budget documents, including character, paragraph, and table styles. Next, the counties called on FML to set up a PatternStream template. The template specifies what information PatternStream must extract from various sources, including databases and other Adobe FrameMaker files; where each type of information should appear in the FrameMaker document; and whether it should be placed in a text string, table, text frame, or image frame.

After the Adobe FrameMaker and PatternStream templates are created in a one-time process, the 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, analysts can edit the FrameMaker file directly. When budgets are revised, the analyst makes the change in the database and simply republishes. "The PatternStream and Adobe FrameMaker solution has cut the typical time to incorporate revisions from two days to less than six hours," says Mitch Tevlin, manager of budget development services for Orange County.

Faster preparation, revisions

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 the documents got more complex, the word processing program started having formatting problems," says Tevlin.

California's Orange County and Santa Clara County are saving time and labor with an integrated database publishing solution based on Adobe FrameMaker and Adobe Acrobat software and Finite Matters' PatternStream software. PatternStream extracts budget information from various databases, populates a FrameMaker template, and automatically creates an Adobe PDF file of the resulting document.

"Now we have more than one way to get information to everyone the government serves. Adobe PDF saves time because we can use a single format for all forms of document distribution."

Leslie Crowell
Budget manager
Santa Clara County

The PatternStream solution solves both problems. Analysts can quickly input changes into the database and then simply click a button to republish the budget as an Adobe FrameMaker document. "With PatternStream, we can replace an outdated budget workbook of 500-plus pages within six hours," says Tevlin. And FrameMaker reliably handles the long documents. "Instead of developing a new publishing engine for PatternStream, we decided to use FrameMaker because it's the best long-document publishing application there is," says Ben Sloan, Finite Matters' president.

Santa Clara County had a similar experience. In the past, analysts prepared budgets manually, typing information directly into FrameMaker files or cutting and pasting from other applications. The new automated process is much faster and results in more consistent formatting. Analysts write explanations of budget items in one FrameMaker document; budget data resides in an Oracle database. With the click of a button, PatternStream marries the two into a new Adobe FrameMaker document. "With PatternStream and FrameMaker, the budget documents are more centralized, standardized, and are created about 30% faster," says Leslie Crowell, budget manager for Santa Clara County. "With the ability to view a draft product, staff can correct errors early, reducing the need for post hoc corrections."

Single format for print and electronic distribution

PatternStream uses Adobe Acrobat in the background to create an Adobe Portable Document Format (PDF) file at the same time it creates the Adobe FrameMaker file. The Adobe PDF file can be printed or published electronically, and it looks exactly like the original FrameMaker file, no matter what hardware, software, and printer the user has. It also maintains the active hyperlinks for indexes, tables of contents, and internal and external Web links. Both counties distribute materials on paper and CD-ROM discs as well as over the Web.

"Preparing Word files for publication to the Web used to take a week. Now we can publish Adobe PDF files instantly," says Tevlin. The searchability of Adobe PDF files is an advantage for constituents who want to research county budgets. "Now we have more than one way to get information to everyone the government serves," says Crowell. "Adobe PDF saves time because we can use a single format for all forms of document distribution."

More time for thinking

For both counties, the database publishing solution frees time to spend on the finer points of the budgets. "We previously spent three weeks checking numbers and assembling the budget document," says Tevlin. "By shaving a week off the process, the Adobe and PatternStream solution allows us to devote more time to the issues behind the numbers."

TOOLBOX

Adobe Acrobat
Adobe FrameMaker
Finite Matters PatternStream
Oracle database

Dell Pentium® workstations
HP Netserver
HP Pentium workstations
Ricoh Aficio AP4500 PostScript® duplex printer

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