GOING DIGITAL:

Moving Your Budget from the Page to the Web

EUNA
solutions

Questica
A Euna Solutions Brand

eunasolutions.com

For any government, its budget book is the most essential document in determining revenue allocation and defining community priorities and outcomes, such as community development, public safety, infrastructure projects, and public education.

Each year, governments must submit their annual budget book that clearly outlines their budget plans for the upcoming fiscal year while ensuring that it meets the highest standards of accessibility. An effective budget book serves as a comprehensive and transparent tool for properly managing revenue, promoting transparency and accountability, and ensuring good governance.

In this guide, we'll explore the importance of creating and publishing an online budget book and how our newest budget book editing tool, included within our already robust data visualization module OpenBook will position your city's brand as one that is transparent and well-run, inspiring public confidence and establishing good rapport with the community you serve.

Why is there a need for an online budget book?

Most governments create budget books for print (typically exported as a PDF file) using traditional methods such as spreadsheets and Word Docs. These methods are often time consuming, labor-intensive, and riddled with inefficiencies that can burden staff, hinder transparency, and yield unsatisfactory results.

Additionally, citizens would appreciate having the option to engage in a budget book that works for them. Whether that's a PDF document or an online budget book, a genuinely captivating budget book should be visually stunning, comprehensible, and easily accessible, with an intuitive design unmatched by traditional printed books.

So, how can you develop a budget book that your citizens can be enthusiastic about?

OpenBook is a transparency and data visualization module of Euna Budget, Powered by Questica. This purpose built module alleviates these challenges and enhances public budget documentation through its latest feature: **Budget Book Studio.**
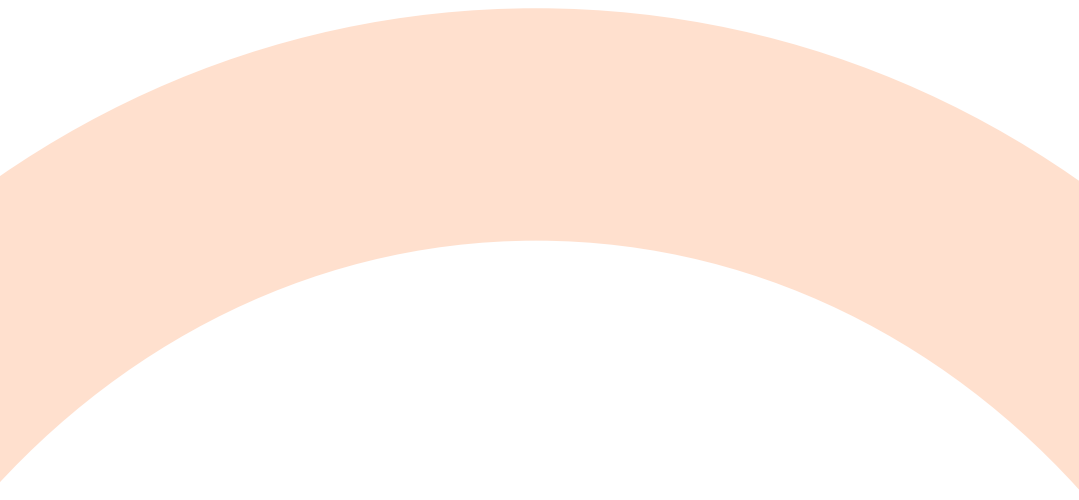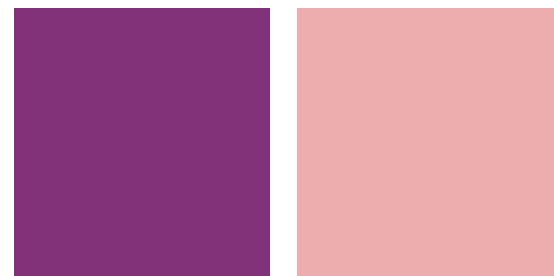
What is Budget Book Studio by Euna Budget?

Budget Book Studio is the newest feature for OpenBook, Euna Budget's transparency and data visualization software.

Budget Book Studio empowers finance professionals to create visually stunning budget books that can be published online. With its user-friendly interface, our online Budget Book Studio enables finance professionals to easily produce budget books that are compliant, accessible, transparent, and visually appealing to all viewers.

So how can OpenBook's Budget Book Studio help your organization achieve a collaborative, engaging, and transparent online budget book?

Achieving effective public engagement starts with creating a mutual, collaborative, and data-driven dialogue with your citizens.

Increased Engagement

The public's expectations of financial transparency, data accessibility, and participation are always evolving. Boosting engagement allows your citizens to have a say in the way public funds are used, and enables your government to gather feedback, suggestions, and concerns to make sure budget decisions reflect community needs and priorities.

Budget Book Studio enables you to capture large data sets — like budgets — and present them in an engaging, accessible, condensed format with interactive visuals, such as charts, graphs, videos, and images.

Through enhanced public engagement, Budget Book Studio provides a cloud-based budget solution that enhances the overall experience for citizens and stakeholders alike, increasing public trust, transparency, and accountability.

OpenBook's Budget Book Studio ensures your organization can quickly and easily access financial data, make informed decisions, and seamlessly adjust your budgets to stay on track and accomplish your goals.

Automated Processes

Using countless Excel spreadsheets combined with massive data sets to build a budget book will only waste time and resources while amplifying the risk of error and burdening your staff.

Creating an effective budget book starts with maximizing workflow and productivity to ensure optimized results with little to no errors or setbacks.

Implementing Euna Budget alongside OpenBook optimizes efficiency by automating entire workflow processes, including tracking and managing budget books, eliminating the need for spreadsheets and manual data entry.

With a push of a button, Budget Book Studio seamlessly synchronizes budget presentations with data from Euna Budget or spreadsheets to build appealing visuals such as tables and charts. In addition, all data sets can be updated to change the entire book and are automatically refreshed with the latest information.

Budget Book Studio's centralized dashboard shows what pages are in progress, open annotations, to-do list items, all accessibility scan failures, and more. The scaffolding feature enables you to limitlessly repeat a section of a book using data variations. For example, the department summaries section of the budget book and the fund summaries can be directed to your dataset containing a master list of departments, and the system will generate your entire summaries section, including extensive paragraphs, tables, and other data visuals.

A truly collaborative budget book requires a centralized location and simplified workflow, alongside effective communication between various departments and stakeholders.

Enhanced Collaboration and Workflow

Budget books created on spreadsheets might seem easily accessible for one person, but inviting collaborators to work on budget books is far from seamless. Since spreadsheets are saved on one person's computer, this hinders other staff members and stakeholders from accessing budget information when needed, and often leads to confusion, frustration, and reduced efficiency throughout the organization.

Budget Book Studio allows allows all parties to effortlessly invite and collaborate in budget book development online – without the use of tedious emails, spreadsheets, and Word Docs.

Every budget book progresses through a streamlined workflow: draft, submitted for review, under review, and approved. Each book also accommodates up to three roles: contributors (who work on the draft versions of documents), reviewers (who have permission to approve these drafts, mark them up, and send them back), and editors (proficient users of the book). This ensures that any changes made by stakeholders are done according to their respective permissions to establish proper version control and oversight.

The Annotations feature (viewed in the dashboard) allows users to tag any element using notes that serve as "to-do list" items and a place to have conversations about the content. This feature also supports @-mentions, similar to how users are tagged on Microsoft Excel sheets or Word Docs. Whenever a user is mentioned in annotations, they'll receive an email and a link to the conversation. A list of open annotations is always available on the dashboard.

Budget Books created for everyone

Developing a budget book using spreadsheets or other traditional methods doesn't inherently adhere to accessibility considerations and ADA compliance. This lack of accessibility can limit budget book engagement and usage for individuals with disabilities, leading to reduced transparency into your organization's financial data and decision-making.

OpenBook has best-in-class accessibility to align with the highest standards of inclusivity and ADA compliance –and is the only solution that offers this set of features. Regulatory pressure to provide accessible content to citizens is increasing every year. OpenBook's Budget Book Studio ensures all budget publications meet the highest accessibility standards:

- WCAG AA compliant, Section 508, ADA, and AODA
- Tested by real people with disabilities, not just automated scans
- Third-party signed VPAT provided from a professional accessibility consulting firm

The enhanced and collaborative workflow in Budget Book Studio empowers collaborative budgeting for improved information sharing and reduced complexities to foster a sense of unity and maximize goal achievements.

Integrated GFOA Budget Award

Although governments, stakeholders, and citizens have a vested interest in what's contained in each budget, budgets developed using spreadsheets are often dense and difficult to understand without a financial background.

Since budget documents contain vital information, such as government services and funds received to prioritize those services, it's essential that these documents are prepared in a way that makes it easy to access and understand by all parties involved.

The Government Finance Officers Association (GFOA) has established the Distinguished Budget Presentation Awards Program to encourage and help state and local governments to develop budget documents of the highest quality that reflect best practices established by the National Advisory Council on State Council on State and Local Budgeting and the GFOA's budgeting best practices.

Budget Book Studio encourages the awarding of this recognition through an in-app integrated checklist that easily tracks your conformance to the GFOA criteria throughout your workflow and generates your budget submission.

Achieving these high-quality budget standards not only increases budget transparency, but further boosts public involvement in budgeting decisions that impact them the most and improves accountability for government leaders.

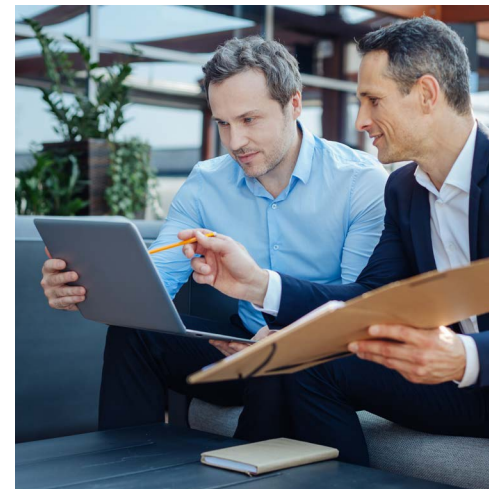# Elevate data visualization and foster transparency with OpenBook

OpenBook is our intuitive and user-friendly data visualization software that helps governments boost transparency and trust by visually communicating financial and non-financial data in a visually appealing way using descriptive text, informational pop-ups, and charts.

With OpenBook's convenient searching, filtering, and sorting tools, discovering information is made quick and easy for all stakeholders.

Looking to elevate your budget?

OpenBook's Budget Book Studio empowers your government to:

- Champion public sector budgeting
- Increase data transparency
- Achieve the highest standards of accessibility
- Seamlessly integrate with various ERP systems
- Enhance collaboration between agency and stakeholders

Ready to experience supercharged budgeting?

Schedule a demo with our Solutions team today or learn more.

eunasolutions.com

EUNA™ solutions

Questica
A Euna Solutions Brand