TIPS FOR BUILDING YOUR ELECTRONIC BUDGET BOOKS

1.) Organize your files by following your table of contents.
- Name each section (tab) with 01, 02, 03, etc. as a folder.
- Combine supporting files into each folder by following naming convention. (i.e., 01_1_Department Information, 01_2_Core, etc.)
- Make sure you have an even number of pages in each document to signify double-sided printing. Add blank pages where needed.

2.) Once all files are organized, you are ready to start building in Acrobat. You can build one of two ways:
- You can build your files by sections first, then combine all sections to make one complete book.
- You can build your entire budget at one time.

3.) Documents larger than 400 pages (200 sheets) must be broken into separate books. Tabs are thicker than a normal sheet of paper and should count as 2 sheets when figuring your sheet count. This will allow for your books to properly open and close without issues.

4.) Acrobat will convert excel and word documents to PDF for you; however, we have had issues with this in the past if a PDF plug-in was missing, so it may be easier and faster to go ahead and convert them from Word or Excel as a PDF first, then place them into your budget.

5.) Once your entire budget is compiled, you can add your page numbers.

6.) After you number your pages, remember to update your table of contents.

7.) Next, it's time to insert your tabs. Your tabs do not need to have a blank page after each tab to signify double-sided.

8.) Now that your budget book is together, you will want to set the Initial View properties. You can do that by clicking page 1. Then go to the file menu and click the properties. Click on the initial view tab and set the Navigation tab to "Bookmarks Panel and Page", set the Page Layout to "Single Page", and set the Magnification to "Fit Height".

9.) Next you will want to check your bookmarks - make sure they are labeled correctly, delete any unnecessary ones, indent and nest as needed.

10.) Save your PDF and submit to OA Document Solutions using the FTP site or by saving the file to a USB flash drive. Or, if your file is not too big to email, that's okay too! OA Document Solutions will print budgets in order of the presentation schedule and approvals of proofs. At minimum please allow 3 business days to print and bind your budget. Please remember that it has to go back and forth for proofs as well, so the earlier you can submit your budget, the better!

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Questions?

Your CSR is more than happy to help!
Contact Us!