**Updating Process for the Fiscal Barometer**

Updated May 9, 2016

This is the process we follow for updating the Fiscal Dashboard. Find all of the spreadsheets mentioned below here: N:\Hutchins\Projects\FiscalDash.

Troubleshooting Contacts:

* For Haver issues, contact Andrew Bailor (x6280)
* For Tech issues, call Joe Kestell (x6087)
* For Sitecore/publishing issues, contact Eric Abalahin (x6559)

Relevant Workbooks:

* Fiscal Impact
* Fiscal Dash
* CBO Monthly Calculations Final

General Note:

* If any changes are made, save as a new workbook and move the old workbook to the “old” folder. Make sure you add the date to the **old** workbook but leave the name of the new workbook the same.

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| **Task** | **Notes on Task** | **Person Responsible** |
| Update CBO data in “CBO Monthly Calculations Final” | Find the updated CBO data here: <https://www.cbo.gov/about/products/RecurringReports>   * Look under heading “Monthly Budget Review” for most recent data   Open the “CBO Monthly Calculations Final” workbook and enter new CBO data into the “raw” tab   * Find the receipts table (typically the second table of the document) and enter this data first. * Do the same for outlay data (typically the third table of the document). A few notes:   + If there is no longer a line item for any field (i.e. Unemployment Insurance or TARP), enter a 0 (or n.m. in the changes section – just follow the example of the past entries).   + Enter “Marketplace Subsidies” into the line that reads “> Other Activities (incl one, not the other) or exchange subsidies”.   + The line items in red are calculations. Extend these each month when you input the new data   + In some months, the outlays table will include a section with a header reading “Estimated Change with Adjustments for Timing Shifts”. In these months, input these changes. When they don’t include the timing shifts, just use the regular estimated change.   After entering the new data in the “raw” tab, all others will update automatically.  Save and close.  Note: For the October update (which occurs in November), there is no data to enter, because CBO does not publish a monthly update in November. Instead, CBO publishes a yearly review (you’ll find it in the same place as the monthly reviews). Because of this, you should enter no data into the “CBO Monthly Calculations Final” that month and instead enter the data from the yearly review directly into the “Fiscal Barometer” workbook tab “Panel\_TaxesandSpending”, but only **AFTER** hitting the “Get Data” button. This should be done after updating both the “Fiscal Impact” and “Fiscal Baromenter” workbooks. In the next month’s update, data entry will resume as normal. | Anna |
| Update “Fiscal Impact” workbook | Open the “Fiscal Impact workbook and hit Ctrl+Shift+D to update all of the Haver data in this spreadsheet.   * If there is a new quarter of data available, you may need to manually extend the horizontal axis on the charts in both the “Panel\_FiscalImpact” and “FIPieces” tabs.   Save and close. | Anna |
| Update “Fiscal Barometer” workbook | Open the “Fiscal Barometer” workbook and go to the “Master” tab.  Hit the “Get Data” button to retrieve all data from the previous two workbooks and to update all Haver and Fred data in this workbook.  Go to the “Spending by Category” tab and copy the most recent available data from columns G, H, I, and J and paste it into columns C, D, E, and F for the same year. | Anna |
| Produce final CSVs and Charts | Press the “Save CSV Files” and “PDF Charts” buttons in the “Master” tab.   * This creates a folder with today’s date in the “FiscalDash” folder. Go into this folder and combine the PDFs in this order: Fiscal Impact, Jobs+Public Construction, Taxes+Spending, The Longer Run. * Save the Combined PDF in this format in the relevant date folder: FiscalBarometer.pdf | Anna |
| Check to see if the data updated properly | Check all the raw data spreadsheets as well as the yellow tabs with the formatted data to make sure everything is correct.  Another good way to check is by looking at the charts in the red tabs. The charts are all linked to the raw data. | Peter |
| Check the final materials | Look at the final CSV and the PDFs of the charts. Look at the CSV files in a text editor.  Check the CSV files for:   * Whether the data updated properly:   + CBO table (compare to the manually updated spreadsheet)   + Fiscal Impact should be updated to the quarter of the GDP release     - Or include the most recent revision   + Real Structures should be updated to the same quarter as the GDP release     - Or include the most recent revision   + State and local tax receipts for census data—check if there was an update     - Make sure the CSV file **taxes\_stateFinal** doesn’t have an extra date-row at the end. (i.e. “10/01/2014,,0”)`     - Delete it if it does   + Employment data should have a bar for the previous month (as long as it’s after that first Friday of the month) * Formatting   + Comma formatting   + Date formats   + Extra rows   + Whether the header/data are the same   + Column order   + Titles (should be inflation3d, not inflation3)   Check these against the CSV files sent by Marcia (saved in the “2.0 from Marcia” folder)  Check the PDF of the charts for:   * Are all the charts on each page * Alignment of the charts * Line thickness and color * As of date in the footer. * Whether the “Brookings” logo is being cut off at the top * Is there an extra page? | Peter |
| Correct any one off errors | * For temporary changes (i.e. “N/A” values at the end of a series), make those changes directly in the CSV files rather than the excel workbook. | Peter |
| Correct substantive errors | * For more substantive errors, refer back to the group, and change the workbook. | Peter |
| Check the local copy | * Copy the most updated CSV files to this folder (overwrite existing files) N:\Hutchins\Projects\FiscalDash\local\_PS\4.2.15 Hutchins - Fiscal Barometer local copy\csv * Open index.html in Firefox * Go through each chart in the firefox browser to make sure the data shows up   + Note: tooltip, etc. won’t work on the local copy | Peter |
| Update WordPress | Once the local version looks okay, send all documents to Yohann Paris ([yparis@brookings.edu](mailto:yparis@brookings.edu)) in Central COMM.   * Make sure to note that the “FiscalBarometer.pdf” doc should be the one linked under “Print all charts” * Go into WordPress and change “Last Updated” date to reflect most recent update | Peter/Lilia |
| Final Check | * Make sure everything is working properly. * Make sure all the charts have been updated properly on site core * Check the PDF to make sure it is updated | All |