**Updating Process for the Fiscal Barometer**

Updated Nov. 6, 2015

This is the process we should follow for updating the Fiscal Dashboard.

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 Data in all 3 Workbooks | Update the   * CBO data in “CBO Monthly Calculations Final.” (Brendan)   + Get the most updated CBO data here: <https://www.cbo.gov/about/products/RecurringReports>   + Look under heading “Monthly Budget Review” for most recent data * Haver data in “Fiscal Impact” (Brendan)   + Extend horizontal axis manually * Haver data in “Fiscal Barometer” (Brendan)   More detailed instructions in the “Master” Spreadsheet  Note: For “Spending by Category”, copy the historical data for 2015 into the projection columns. | Brendan |
| Produce final CSVs and Charts | Run the “Save CSV Files” and “PDF Charts” buttons.   * 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 | Brendan |
| 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 Sitecore | Once the local version looks okay, update everything on Sitecore  **1. Replace CSV Files** by going to  Media Library🡪Multimedia🡪  Interactives🡪2014🡪FiscalBarometer🡪CSV   * click “Advanced Upload” * Highlight all the relevant CSVs and the PDF file in the Hutchins folder, * **check the “Overwrite Existing Media Items” box** * Save * Publish the csv folder   **2. Update HTML code by going to**  Content Editor🡪Home🡪Research🡪  Interactives🡪2014🡪Fiscal Barometer   * Change the “As of” Date * Save * Publish to Production | Kerry |
| 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 |