**Updating Process for the Fiscal Barometer**

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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 Marcia Underwood (x6301)

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 |
| Check Excel Templates | Go over each of the excel templates to make sure the columns (headers, data and titles) match the sample CSV files Marcia Underwood sent | Pari |
| Update Data in all 3 Workbooks | Update the   * Fred data in “Fiscal Dash” (Brendan) * Haver data in “Fiscal Dash” (Brendan) * Haver data in “Fiscal Impact” (Brendan) * CBO data in “CBO Monthly Calculations Final.” (Pari)   More detailed instructions in the “Master” Spreadsheet | Brendan & Pari |
| Produce final CSVs and Charts | Run the “Save CSV Files” and “PDF Charts” macro.   * 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:   FiscalBarometerMMDDYYYY.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. | Emily |
| 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:   * Comma formatting * Date formats * Extra rows * Whether the header/data are the same * Column order * Titles (i.e. inflation3c vs. inflation3)   Check these against the CSV files sent by Marcia (saved in the **BLAHBLAH**  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? | Emily |
| 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. | Emily |
| Correct substantive errors | * For more substantive errors, refer back to Brendan and Pari, and change the workbook. | Emily🡪 Brendan & Pari |
| Update Log | Make note of one-off changes to the CSV files in the “Log” in our master workbook.  Also log all changes to the Excel Workbook. | Brendan, Emily |
| E-mail the final materials to Kerry and Eric E. | Make sure all the CSV files and PDFs are attached,( and refer them to the folder in the N: drive) | Brendan |
| Update on local version | Put the updated CSV files in our local folder | Pari |
| Check local version | Check to make sure all the charts on the local version of the dashboard look right, and that the PDFs can be downloaded.   * Also compare to last month’s sitecore files | Kerry, Pari |
| Update on 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   * Highlight all the relevant CSV and PDF files in the Hutchins folder, * click “Advanced Upload” * check the “replace and overwrite” box * Save   **2. Update PDF File** by going to  Media Library > Multimedia > Interactives > 2014 > FiscalBarometer   * click “Advanced Upload” * Select the PDF. * Save   **2. Update HTML code by going to**  Content Editor (Home) > Research > Interactives > 2014 > Janet Yellens Dashboard   * Change the “As of” Date * Update the name of the PDF link * Save   3. For both the datafiles folder and the content editor, hit “Publish” after saving. (Check yes for the “also publish children” option.  **Note: If you need to change the javascript code for the charts (i.e. correcting a legend), go to:**  [www.brookings.edu/research/essays/2014/](http://www.brookings.edu/research/essays/2014/) | Kerry, Pari |
| Check Sitecore version | * Make sure everything is working properly. * Make sure all the charts have been updated properly on site core, and the as-of date is correct. * Read through all the text captions as well (though those changes should be made at a different time). * Compare the CSV files from Sitecore to our CSV files in the Hutchins folder. | Pari |