

**IRS 990 e-File Data (8) –  
Data Wrangling and Export to  
Stata**

---

**IRS 990 e-File Data (7) –  
Generate Codebook**

---

**IRS 990 e-File Data (6) –  
Download IRS 990, 990EZ, and  
990PF Filings and Associated  
Schedules into MongoDB**

---

**IRS 990 e-File Data (part 5)  
– Download IRS 990 Filings**

# **and Associated Schedules into MongoDB**

---

**IRS 990 e-File Data (part 4)  
– Download IRS 990 Filings into MongoDB**

---

**IRS 990 e-File Data (part 3)  
– Load Index Files into PANDAS**

---

**IRS 990 e-File Data (part 2)  
– Load Index Data and Insert into MongoDB**

---

# IRS 990 e-File Data (part 1) – Set up AWS CLI credentials and grab index files

---

## Tutorials for Sarbanes-Oxley Paper Data

Dan Neely (from University of Milwaukee-Wisconsin) and I just had the following article published at the *Journal of Business Ethics*:

Saxton, G. D., & Neely, D. G. (2018). [The Relationship Between Sarbanes–Oxley Policies and Donor Advisories in Nonprofit Organizations](#). *Journal of Business Ethics*.

This page contains tutorials on how to download the IRS 990 e-file data that was used for the control variables in our study.

## Tutorials

- [IRS 990 e-File Data \(part 1\) – Set up AWS CLI credentials and grab index files](#)
- [IRS 990 e-File Data \(part 2\) – Load Index Data and Insert into MongoDB](#)
- [IRS 990 e-File Data \(part 3\) – Load Index Files into PANDAS](#)
- [IRS 990 e-File Data \(part 4\) – Download IRS 990 Filings](#)

into MongoDB

- [IRS 990 e-File Data \(part 5\) – Download IRS 990 Filings and Schedules into MongoDB](#)
- [IRS 990 e-File Data \(part 6\) – Download IRS 990, 990PF, and 990EZ Filings into MongoDB](#)
- [IRS 990 e-File Data \(part 7\) – Generate Data Codebook](#)
- [IRS 990 e-File Data \(part 8\) – Data Wrangling and Export to Stata](#)

I hope you have found this helpful. If so, please spread the word, and happy coding!

---

## Python PANDAS Code Bytes

This page contains brief (generally one-liner) blocks of code for working with Python and [PANDAS](#) for data analytics. I created it as a handy reference for PANDAS commands I tended to forget when I was learning. I hope it proves useful to you, too! I also have a page with longer [data analytics tutorials](#).

### Table of Contents

- [Jupyter Notebook Settings](#)
- [Working with Python Lists](#)
- [Working with Python Dictionaries](#)
- [Analysis](#)
- [Generating New Variables, Arrays, etc.](#)
- [I/O](#)
- [Looping](#)
  
- [Time Series](#)
- [Indexing and Sorting](#)

- [Missing Data](#)
- [Custom Functions](#)
- [DataFrame Manipulations](#)
- [Custom Twitter Variables](#)
- [Working with MongoDB in Python](#)

## Jupyter Notebook Settings

Set width of columns for display:

```
pd.set_option('display.max_columns', None)
```

Set cell width:

```
pd.set_option('max_colwidth', 150)
```

## Working with Python Lists

Break list into chunks of 4 (needed for some APIs, for example)

```
mylist_chunked = [mylist[i:i+4] for i in xrange(0, len(mylist), 4)]
```

Finding duplicates in a list:

```
import collections
```

```
mylist = ['twitter', 'facebook', 'instagram', 'twitter']
```

```
[item for item, count in collections.Counter(mylist).items() if count > 1]
```

Remove list element:

```
mylist.remove('revenue')
```

## Working with Python Dictionaries

Delete a key from a dictionary:

```
del dict[key]['key_to_delete']
```

Create sub-dictionary (from sub-set of keys):

```
subdict = {k: dict[k] for k in ('key1', 'key2')}
```

# Analysis

Cross-tabulation:  
`pd.crosstab(df['var1'], df['var2'])`

## Generating New Variables, Arrays, etc.

```
Create list from dataframe column:  
screen_names = df['screen_name'].tolist()  
Create list of unique column values in DF:  
tickers_in_df = pd.unique(df.ticker.ravel()).tolist()  
Convert string variable to float:  
df['count_V2'] =  
df['count'].convert_objects(convert_numeric=True)  
Convert float column to int (only works if there are no  
missing values):  
df_2014['rt_count'] = df_2014['rt_count'].astype(int)  
Convert column to string:  
df.index = df.index.astype(str)  
Create new variable as a slice of an existing one:  
df['cusip8'] = df['cusip'].apply(lambda x: x[:8])  
Replace a word within a column with another word:  
df['8-K'] = df['8-K'].str.replace('Item', 'Section')  
Fill in missing values for one column with zero:  
df_2014['rt_count'] = df_2014['rt_count'].fillna(0)  
Get new list of unique items in a list:  
screen_names_unique = list(set(screen_names))  
Create dummy variable based on whether another column contains  
specific text (values will be 'True' and 'False'):  
df['retweeted_status_dummy'] =  
df['retweeted_status'].str.contains('THIS', na=False)  
Then convert to float (will convert 'True' and 'False'  
categories of above variable into '1' and '0', respectively):  
df['retweeted_status_dummy'] =  
df['retweeted_status_dummy'].astype(float)  
Replace values (here, replace 'None' with '0'):  
df['reply_message'] =  
df['in_reply_to_screen_name'].replace([None], ['0'])  
Replace values (here, replace np.nan values with '0'):
```

```

df.ix[df.Number_of_retweets.isnull(), 'Number_of_retweets'] =
    0
    Switch values of '0' and '1':
df['reply_message'] = df['reply_message'].replace([1],
    [99]).replace([0],[1]).replace([99],[0])
Create binary variable from count variable (if old var=0,
    assign value of 0; otherwise 1):
df['urls'] = np.where(df['entities_urls_count']==0, 0, 1)
    Change each unicode element in a list to string:
tickers_in_df = [x.encode('UTF8') for x in tickers_in_df]
    Change column values to upper case:
df['Name'] = df['Name'].apply(lambda x: x.upper())
    Change column values to upper case:
sec['8-K Item'] = sec['8-K Item'].str.upper()
    Find number of unique values:
len(pd.unique(compustat_2013.cusip.ravel()))
Add leading zeros to string variable (as many as needed to
    reach 10 characters):
df['cik_x'] = df['cik_x'].apply(lambda x: x.zfill(10))
    Convert column to string and add leading zeros:
df['CIK_10'] = df['CIK'].astype(str).apply(lambda x:
    x.zfill(10))
    Get a list of values from a DF column:
values_list = df['8-K'].value_counts().keys().tolist()
    Find number of cases with fewer than the mean value:
sum(df['followers_count'] < df['followers_count'].mean())

```

## I/O

```

    Read in a pickled dataframe:
ticker_master = pd.read_pickle('valid_tickers_317.pkl')
    Read in JSON file:
f = open('valid_tickers_list_317.json', 'r')
    valid_tickers = simplejson.load(f)
    Read in JSON file -- method 2:
with open('my_list.json', 'r') as fp:
    my_list = json.load(fp)
    Save a list as JSON file:
f = open('all_valid_screen_names.json', 'w')
    simplejson.dump(valid_twitter_accounts, f)
    f.close()

```

```

Save a list as JSON file -- method 2:
with open('my_list.json', 'w') as fp:
    json.dump(my_list, fp)
Read in Excel file:
twitter_accounts = pd.read_excel('Twitter Account-level
Database – non-excluded tickers and accounts only.xlsx',
    'accounts', header=0)
Write Excel file:
df.to_excel('df.xls', sheet_name='Sheet1')

```

## Looping

Looping over rows (note how to select a slice of rows):

```

for index, row in df[:10].iterrows():
    print index, row['content']

```

Loop over rows and update existing variable:

```

for index, row in df.iterrows():
    df['count'] = count

```

Loop over rows and create new variable, method 1:

```

for index, row in df.iterrows():
    #df.ix[df.index==index, 'count'] = count #LONGER
    VERSION

```

```

df.ix[index, 'count'] = count #SHORTER VERSION

```

Loop over rows and create new variable, method 2:

```

for index, row in df.iterrows():
    df.loc[index, 'count'] = count

```

## Time Series

Weekdays:

```

weekdays_only = by_day2[by_day2['weekday'] < 5 ] weekday_count
= df.groupby(ts.index.weekday).apply(f) by_day3['weekday'] =
by_day['date'].apply(lambda x: x.weekday())

```

Add missing days (with zeros) for every day in a dataframe:

```

df_filled = df.unstack().fillna(0).stack()

```

Change specific columns

```

df_filled.loc[df_filled['Number of Firm Tweets'] == 0,
['Number of Firm Followers (start)', 'Number of Lists for Firm
(start)']] = np.nan

```

Set column to datetime:



```

df['created_at'] = pd.to_datetime(df['created_at'])
    Convert datetime column to date:
df['date'] = [t.date() for t in df['datetime']]
    Generate lagged variable with multi-index DF:
    df['Mentions [t-1]'] =
    df['Mentions'].unstack().shift(1).stack()
Generate variable aggregated over 3-day window lagged one day:
    df['Mentions [sum of t-1:t-3]'] =
pd.rolling_sum(df['Mentions'].unstack().shift(),
    window=3).stack()
    Select date range for DF:
df_2014 = df['2014-1-1':'2014-12-31']

```

## Indexing and Sorting

```

    Set the index:
df = df.set_index(['created_at'])
    Reset Index:
df.reset_index(inplace=True)
    Set Multi-Index:
df = df.set_index(['ticker', 'day'])
    Sort dataframe:
df.sort(['ticker', 'day'], inplace=True)
    Name Existing Multi-index columns:
df.index.names = ['day', 'ticker']
With multi-index df -- get unique items per index level:
len(firm_day_counts_firm_tweets.index.levels[0])
len(firm_day_counts_firm_tweets.index.levels[1])
    Swap levels on multi-index dataframe:
df_swapped = df.swaplevel('ticker', 'day')
    Get minimum date in DF:
df.index.min()
    Complex conditional row selection during loop:
if (row['Form Type'] == '8-K') and (row['8-K Item']==") and
(row['8-K Item - V2']==") or (row['8-K Item']=='Item that') or
(row['8-K Item']=='Item fo'):

```

## Missing Data

Interpolation with backfill and forward fill (n.b. - does not

```

        respect multi-index):
df['F_x')]=df['F'].interpolate(method='linear').bfill().ffill(
    )
    Find rows with empty column:
    missing = df[df['ticker'].isnull()]
    Fill missing values in one column with values from another
    column:
sec.loc[sec['8-K Item_v2'].isnull(), '8-K Item_v2'] = sec['8-K
    Item']

```

## Custom Functions

Function for generating a series of new one-day lag variables in a dataframe:

```

def lag_one_day(df):
    #df_cols = df.columns
df_cols = [u'Number of Firm Mentions', u'Number of Firm
    Tweets']
    for i in df_cols:
        col = str(i)+str('[t-1]')
        if '[t-1]' not in str(i):
            df[col] = df[i].unstack().shift(1).stack()

```

Function for generating a series of new dataframe variables that aggregate over a multi-day period:

```

def lag_one_day(df):
    #df_cols = df.columns
df_cols = [u'Number of Firm Mentions', u'Number of Firm
    Tweets']
    for i in df_cols:
        col = str(i)+str('[sum t-1:t-3]')
        if '[t-1]' not in str(i):
            df[col] = pd.rolling_sum(df[i].unstack().shift(),
                window=3).stack()

```

## DataFrame Manipulations

Subset of DF -- based on a condition in a column:

```
df[df['reply_message'] == 1]
```

Subset of DF -- specific columns:

```
df[['in_reply_to_screen_name', 'in_reply_to_status_id',
```

```

        'reply_message']].head()
        Drop a column:
df = df.drop('entities_urls',1)
        Intersection of two lists:
pd.Series(np.intersect1d(pd.Series(tickers_in_df),
        pd.Series(valid_tickers)))
        Difference between two lists (all different elements from
        either list):
set(tickers_in_df).symmetric_difference(valid_tickers_with_twitter)
        Difference between two lists (elements from list1 missing from
        list2):
        set(list1) - set(list2)
        Create DF based on whether column value is in a list:
df = df[df.ticker.isin(mylist)]
        Create an empty dataframe:
columns = ['ticker', 'month', 'degree']
df = pd.DataFrame(columns=columns)
        Add row (row 0) to empty dataframe:
df.loc[0] = pd.Series({'ticker':'Z', 'month':'12', 'degree':
        ""})
        Change cell column values for a specific row (index=16458):
sec.ix[16458, "8-K Item - V2"] = 'Item 2.01'
        Create dataframe from list/dictionary:
months = ['2014-1', '2014-2', '2104-3']
data = {'month': months}
df = pd.DataFrame(data, columns=['month', 'degree'])
        Add rows to a dataframe:
df = df.append(df_month)
        Create dataframe from list of column names:
d = {'Variable Name': list(df.columns.values)}
variables = DataFrame(d)
        Create dataframe by deleting all rows with null values in one
        column:
df2 = df[df['keep'].notnull()]
        Rename a single column:
df.rename(columns={'cusip':'cusip_COMPUSTAT'}, inplace=True)
        Create dataframe based on column value appearing in a list:
missing = df[df['cusip'].isin(mylist)]
        Look for duplicates in a dataframe:
counts = merged.groupby('cusip').size()

```

```
df2 = pd.DataFrame(counts, columns = ['size'])
df2 = df2[df2.size>1]
df2
```

Create version of dataframe with conditions on two variables  
(for removing a duplicate firm):

```
merged = merged[~((merged['fyear']==2012) &
(merged['gvkey']=='176103'))]
```

Select partial dataframe -- complex conditions:

```
sec[(sec['Form Type'] == '8-K') & (sec['8-K Item']==") &
(sec['8-K Item - V2']==") | (sec['8-K Item']=='Item fo') &
(sec['8-K Item - V2']==") | (sec['8-K Item']=='Item that') &
(sec['8-K Item - V2']==")]
```

Merge two dataframes:

```
merged = pd.merge(fb, org_data, left_on='feed_id',
right_on='Org_ID')
```

Deep copy of DF:

```
df2 = df.copy(deep=True)
```

Get a slice of dataframe (here, the two rows with the given  
indexes):

```
df.loc[11516:11517]
```

## Custom Twitter Variables

Time on Twitter:

```
import datetime
```

```
df['start']=np.datetime64('2016-04-01')
```

```
df['created_at'] = pd.to_datetime(df['created_at'])
```

```
df['time_on_twitter'] = df['start'] - df['created_at']
```

```
df['time_on_twitter_days'] =
```

```
df['time_on_twitter'].astype('timedelta64[D]')
```

```
df['time_on_twitter_days'] =
```

```
df.time_on_twitter_days.astype('int')
```

## Working with MongoDB in PANDAS

Show first 2 documents:

```
for user in users.find():[:2]:
```

```
print user, '\n'
```

Get frequency counts:

```
from bson.son import SON
```

```
pipeline = [ {"$group": {"_id": "$FormType", "count": {"$sum":
                1}}} ]
    list(file_list.aggregate(pipeline))
Loop over random sample of 100 with filtering:
    for file in file_list.aggregate([
        { '$match': {'FormType': { '$in': ['990PF']}} },
        { '$sample': {'size': 100} }
    ]):
        print file
```

I hope you have found this helpful. If so, please spread the word, and happy coding!