# IATI User Guide

November 2019

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## Overview

In this user guide, Amp Impact users will learn how to do:

1. A preliminary setup for IATI
2. Setup IATI data
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4. Access the public link to download IATI XML file(s)
5. Validate the public link to IATI XML file(s)
6. Upload the IATI XML file(s) to their website and/or IATI

## Track IATI Reporting Data

The International Aid Transparency Initiative (IATI) is an initiative that works towards providing transparency regarding aid, development, and humanitarian resources. Organizations use the IATI Standard to collect and report on data for their internal reporting and for external stakeholders.

Objects and Fields used for IATI reporting are built into Amp Impact. The following custom objects function solely to create data that is compatible with IATI:

1. Organization_Role__c
2. IATI_Policy__c
3. Project_IATI_Policy__c
4. IATI_Sector__c
5. Project_IATI_Sector__c
6. Transaction_Project_IATI_Sector__c

The following objects have fields that may be added by the user to the object's fieldset or page layout to account for IATI compatibility:

1. Account__c
2. Project__c
3. Project_Indicator__c
4. Geographical_Area__c
5. Project_Geographic_Area__c
6. Disbursement__c
7. Financial__c
8. Budget__c

Amp Impact supports the download of an XML for both Organisations and Activities, such that a public link is produced. Users are able to use this link to upload data onto the IATI Standard.

## IATI Terminology

For more information, reference this IATI page.

| IATI Term | Corresponding Amp Term | Definition |
|---|---|---|
| Organisation Standard | Account | It is designed to report forward-looking aggregate budget information for the reported organisations, and planned future budgets to recipient institutions or countries. It is also used to report links to relevant public documents.<br>Organisations publish this data in an Organisation XML file. It is expected that every organisation publishing IATI data should include one Organisation file, which is updated at least annually. |
| Activity Standard | Project | It is designed for reporting the details of individual development cooperation's activities/projects. An activity is defined by the reporting organisation. Depending on who is reporting, it might be a large programme, a small project or another logical grouping of work and resources. capture information about many different kinds of aid activities.<br>Organisations publish this data in an Activity XML file. It is expected that every organisation publishing IATI data should include one at least Activity file. An Activity file can detail one or many activities, and an organisation can publish one or many files. |
| Location | Geographic Area | This is a sub-national geographical identification of the target locations of an activity. These can be described by gazetteer reference, coordinates, administrative areas or a textual description. Any number of locations may be reported. |
| Budget-item | Financial | This is an identifier for a single item in the budget. If more than one budget-item is reported then the percentage share must be reported. All percentages should add up to 100 percent. |
| Result | Objective | This is a container for reporting outputs, outcomes, impacts and other results that stem directly from the activity. This may be repeated for each type of result reported. |

| | | |
|---|---|---|
| Actual | Result | This is a record of the achieved result for the current period |

## IATI Organisation

Every IATI publisher needs to set up an Organisation Standard XML file to hold core information about their organisation. In Amp impact, the organisation refers to the Account object.

### 1. Setup

Prior to setting up IATI data, the user needs to take certain preliminary steps to setup a Project record for preparing to create an IATI Organisation XML.

Refer to the steps mentioned in the General User guide of Amp Impact for setting up the following:

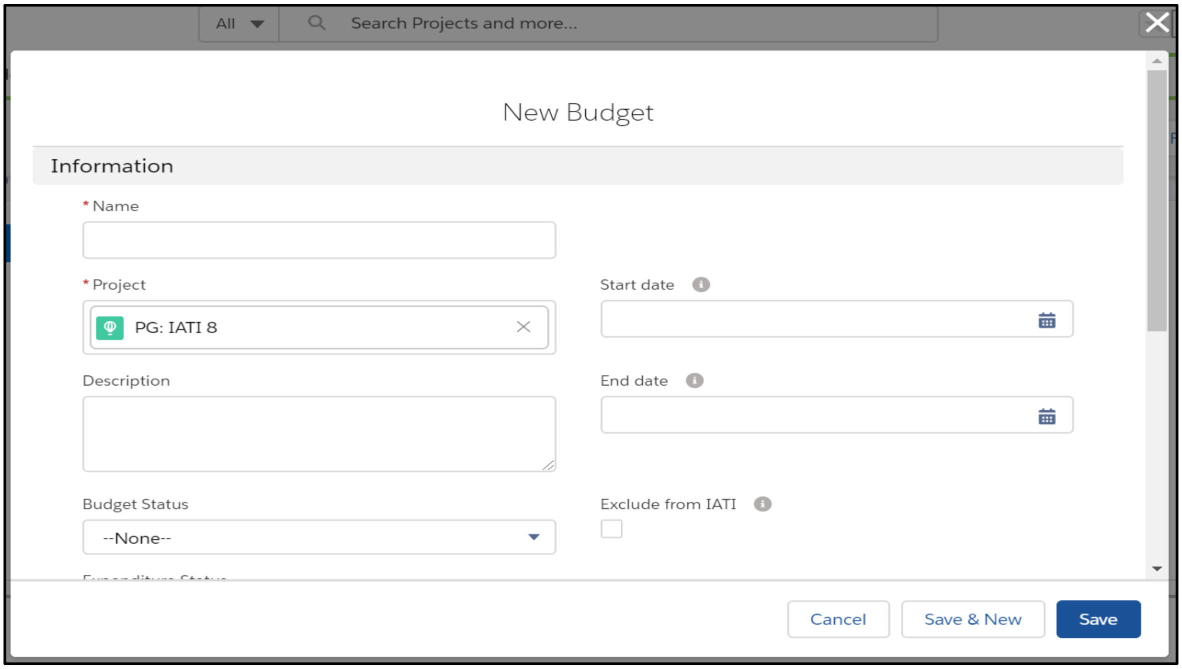
a. Create a Project record
b. Create Reporting Periods (RPs)

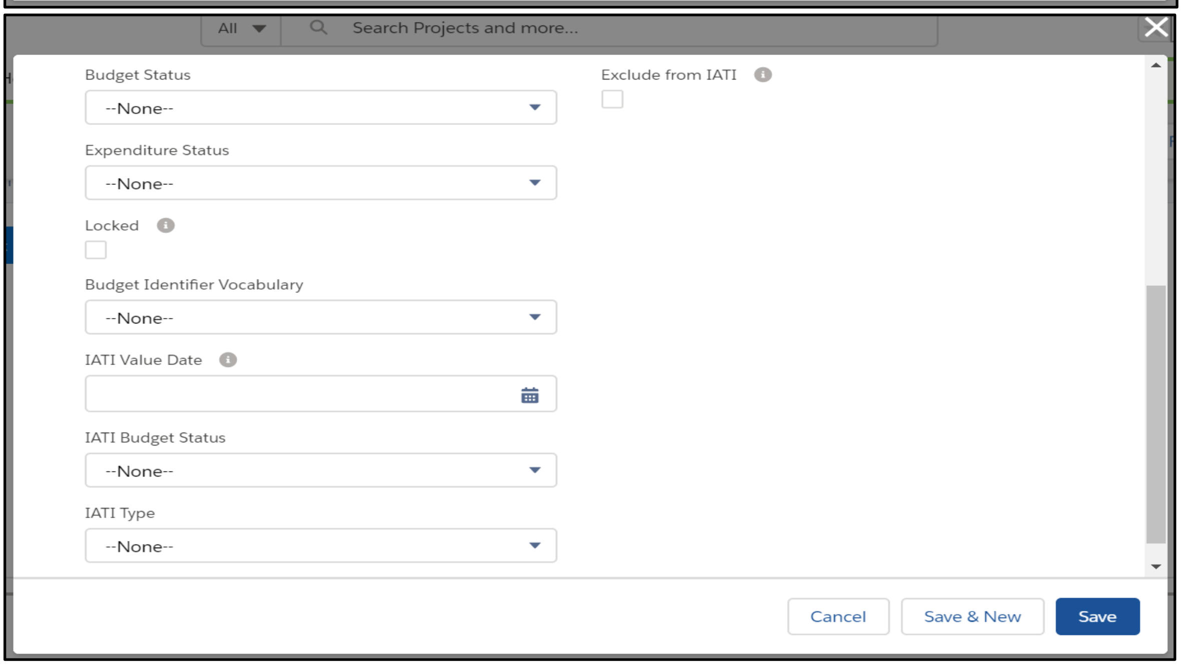
### 2. Setting up your IATI Data

In order to set up data for an Organisation XML to be downloaded, Budgets and Financials Line Items must be added.

#### I) Adding Budgets

Refer to *Amp Impact General User Guide* to know more about how to create Budget records. The IATI fields that display while creating a New Budget record are displayed in the images below:




Amp fields on the Budget object, mapped with corresponding IATI vocabulary, that will print on IATI Organisation XML are depicted in the table below:

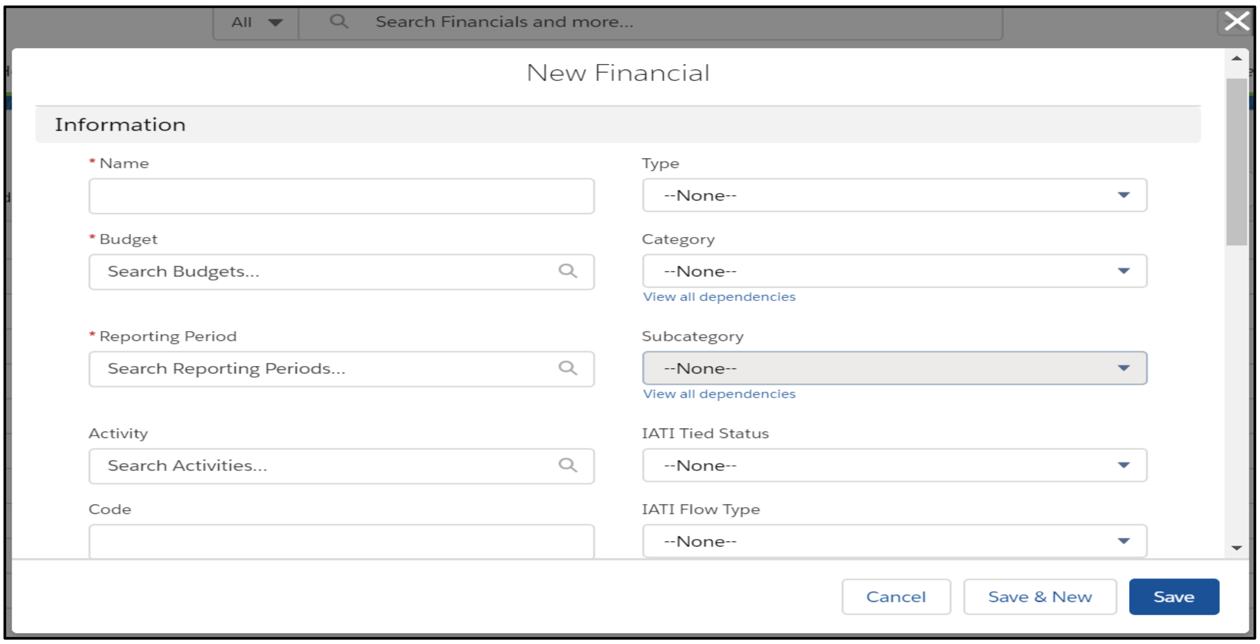
| S.No | Parent IATI Element | IATI Element | Amp/Standard Field |
|---|---|---|---|
| 1 | iati-organisation | total-budget | IATI_Budget_Status__c |
| 2 | total-budget | period-start | Start_Date__c |

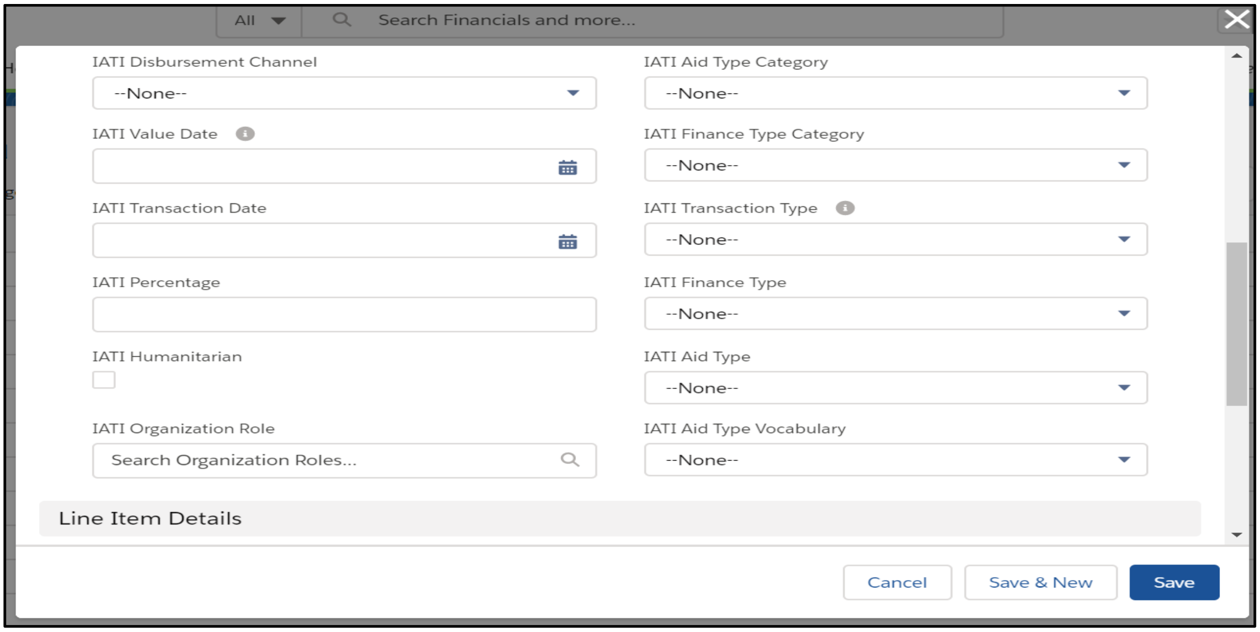
| | | | |
|---|---|---|---|
| 3 | total-budget | period-end | End_Date__c |
| 4 | total-budget | value | Planned_Expenditure__c |
| 5 | total-budget | value | CurrencyISOCode |
| 6 | total-budget | value | IATI_Value_Date__c |
| 7 | iati-organisation | recipient-org-budget | IATI_Status__c |
| 8 | recipient-org-budget | recipient-org | Organisation_Role__r.IATI_Receiving_Project__c |
| 9 | recipient-org-budget | recipient-org | Organisation_Role__r.IATI_Receiving_Project__r.Account__r.Organization_Identifier__c |
| 10 | recipient-org | narrative | Organisation_Role__r.IATI_Receiving_Project__r.Account__r.Name |
| 11 | recipient-org-budget | period-start | Start_Date__c |
| 12 | recipient-org-budget | period-end | End_Date__c |
| 13 | recipient-org-budget | value | Planned_Expenditure__c |
| 14 | recipient-org-budget | value | CurrencyISOCode |
| 15 | recipient-org-budget | value | IATI_Value_Date__c |
| 16 | iati-organisation | recipient-region-budget | IATI_Status__c |
| 17 | recipient-region-budget | period-start | Start_Date__c |
| 18 | recipient-region-budget | period-end | End_Date__c |
| 19 | recipient-region-budget | value | Planned_Expenditure__c |
| 20 | recipient-region-budget | value | CurrencyISOCode |
| 21 | recipient-region-budget | value | IATI_Value_Date__c |
| 22 | iati-organisation | recipient-country-budget | IATI_Budget_Status__c |
| 23 | recipient-country-budget | period-start | Start_Date__c |
| 24 | recipient-country-budget | period-end | End_Date__c |
| 25 | recipient-country-budget | value | Planned_Expenditure__c |
| 26 | recipient-country-budget | value | CurrencyISOCode |
| 27 | recipient-country-budget | value | IATI_Value_Date__c |
| 28 | total-expenditure | period-start | Start_Date__c |
| 29 | total-expenditure | period-end | End_Date__c |

| | | | |
|---|---|---|---|
| 30 | total-expenditure | value | Actual_Expenditure__c |
| 31 | total-expenditure | value | CurrencyISOCode |
| 32 | total-expenditure | value | IATI_Value_Date__c |

### II) Adding Financials Line Items

Refer to Amp Impact General User Guide to know more about how to create Financial Line Item records records on Financials page. The IATI fields that display while creating a New Financial record are displayed in the images below:






The following table depicts the fields on Financials object, mapped with corresponding IATI vocabulary, which will print on IATI Organisation XML:

| S.No | Parent IATI Element | IATI Element | Amp/Standard Field |
|---|---|---|---|
| 1 | total-budget | budget-line | Internal_Code__c |
| 2 | budget-line | value | Amount_Planned__c |
| 3 | budget-line | value | CurrencyISOCode |
| 4 | budget-line | narrative | Name |
| 5 | recipient-org-budget | budget-line | Internal_Code__c |
| 6 | budget-line | value | Amount_Planned__c |
| 7 | budget-line | value | CurrencyISOCode |
| 8 | budget-line | narrative | Name |
| 9 | recipient-region-budget | budget-line | Internal_Code__c |
| 10 | budget-line | value | Amount_Planned__c |

| | | | |
|---|---|---|---|
| 11 | budget-line | value | CurrencyISOCode |
| 12 | budget-line | narrative | Name |
| 13 | recipient-country-budget | budget-line | Internal_Code__c |
| 14 | budget-line | value | Amount_Planned__c |
| 15 | budget-line | value | CurrencyISOCode |
| 16 | budget-line | narrative | Name |
| 17 | total-expenditure | expense-line | Internal_Code__c |
| 18 | expense-line | value | Amount_Actual__c |
| 19 | expense-line | value | CurrencyISOCode |
| 20 | expense-line | narrative | Name |

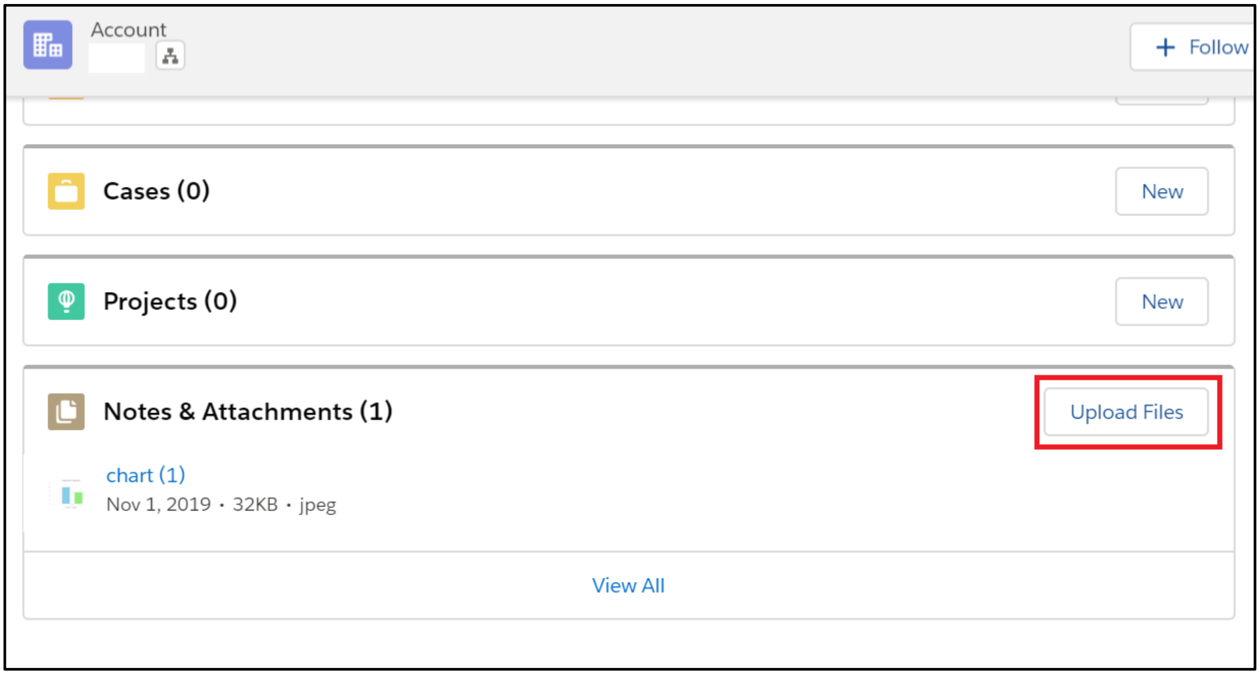
### III) Adding Attachments

Amp Impact enables users to generate a URL for a public link to any attachment/supporting documents and add it to IATI Organisation XML. For instance, users can leverage this feature to generate a URL for creating a public link to an excel sheet that contains a budget with related assumptions (and/or photos of the program) to increase transparency around the usage of funds by their organisation. This public link can be added to IATI Organisation XML.

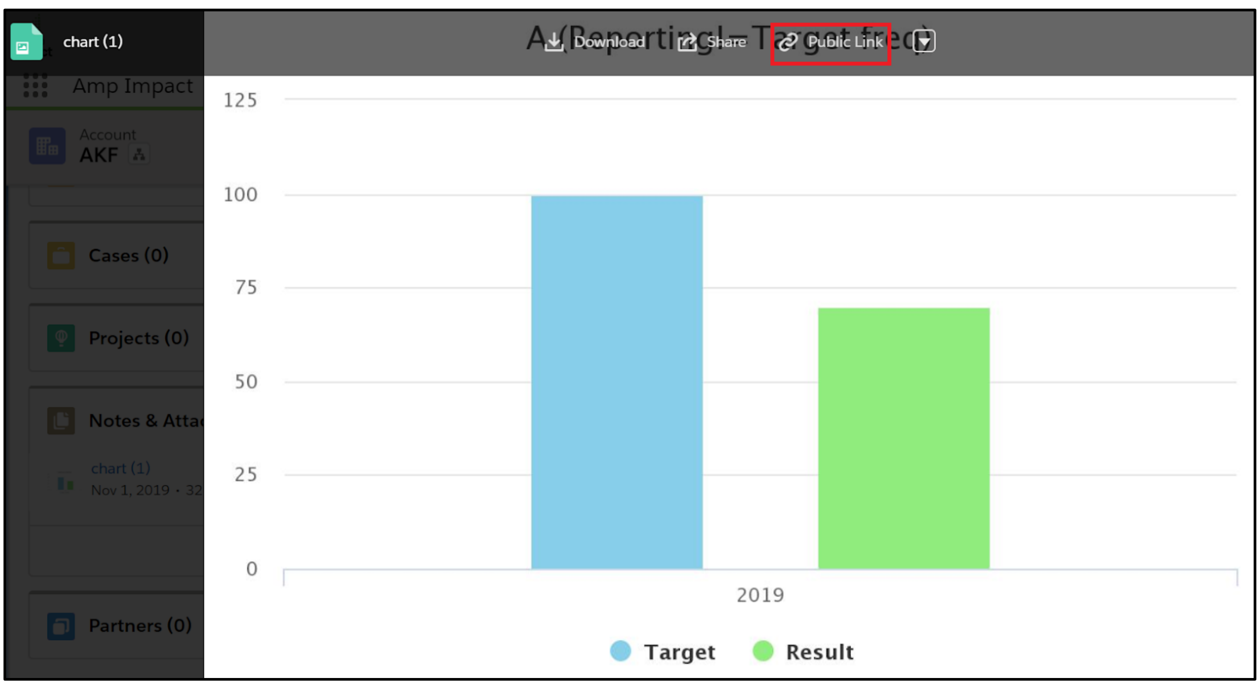
ⓘ **NOTE**: The field ampi__Include_in_IATI__c must be set to TRUE in order for the attachment to display in the XML. In addition, ensure that the URL for public link to the attachment is generated before the XML is generated.

**To generate a URL for the public link, follow the steps below:**

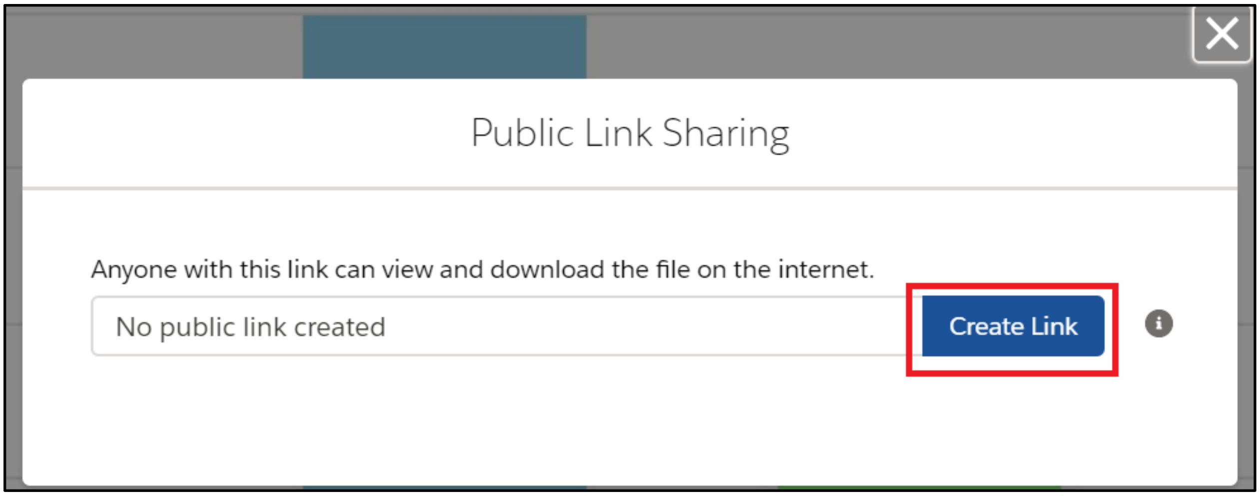
1. Navigate to the Accounts object. Open an Account record
2. In the Related list, scroll down to Notes and Attachments section
3. Click on Upload Files button (see screenshot below). Select the desired file to be attached



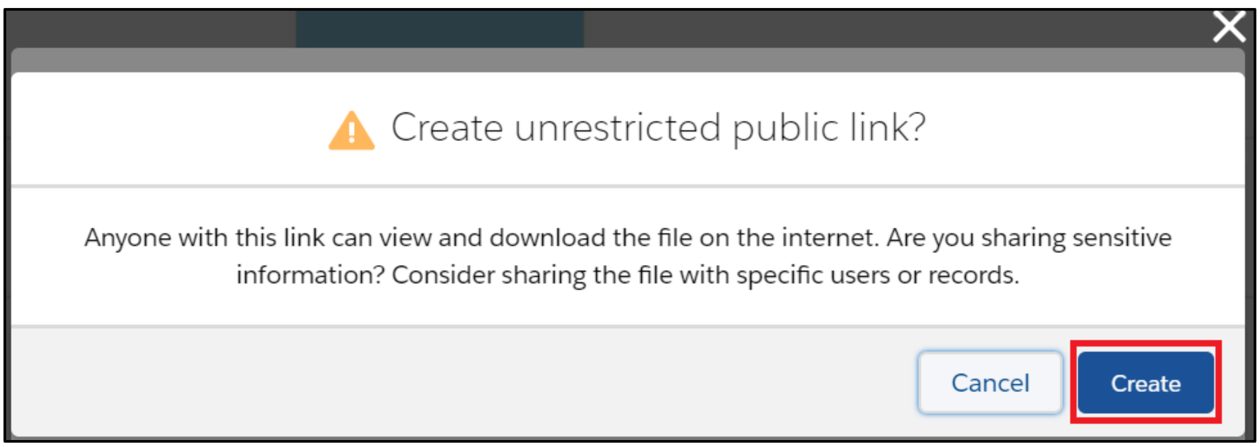

4. In order to see a preview of the attachment, click on the link to the attached document
5. Click on the Public Link button (see screenshot below)



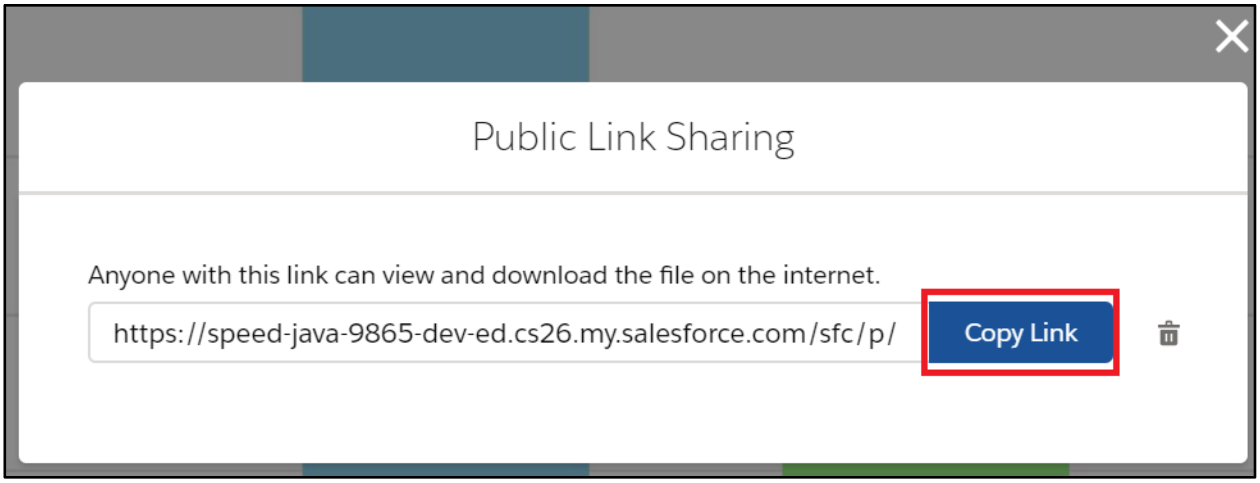
6. In the Public Link Sharing popup, click on the Create Link button (see screenshot below)




   a. The Create Unrestricted Public Link popup warns the user that anyone with the link can view and download the document on the internet. Click on Create (see screenshot below).




   b. The Public Link Sharing popup displays again (see screenshot below). It contains the URL to the public link.

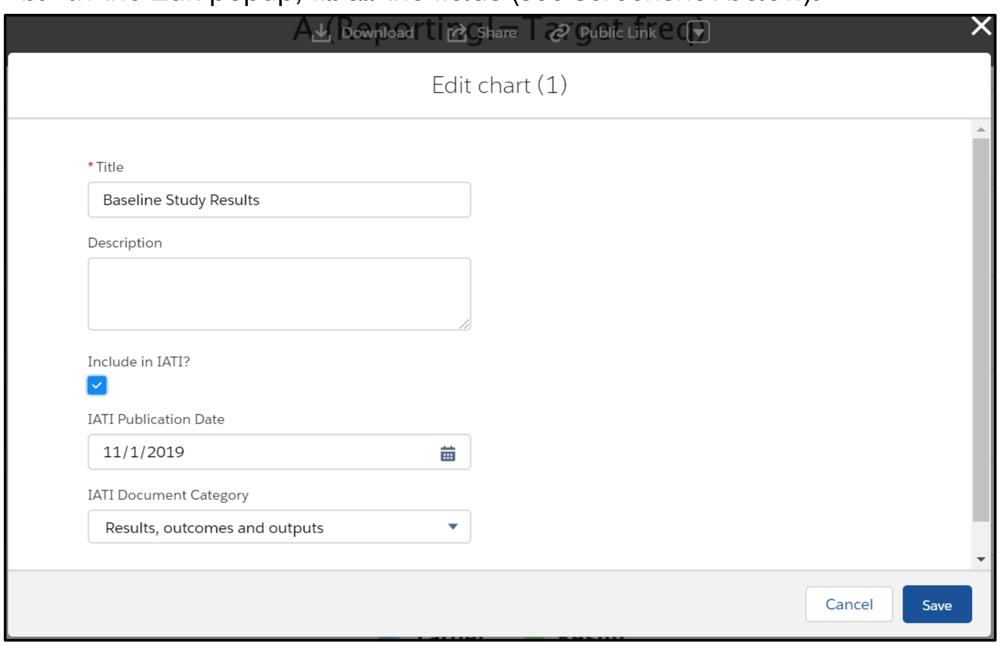



i. If a user wants to copy the link to the clipboard, click on the Copy Link button (see screenshot above).
ii. If a user no longer wants to share this attachment, click on Delete icon (see screenshot above). This will delete the public link permanently. Anyone with this URL will not be able to access the file. A new URL will have to be generated to create a new public link.

To publish the URL into an IATI Organisation XML, follow the steps below:

1. Navigate to the Accounts object. Open an Account record.
2. In the Related list, scroll down to Notes and Attachments section.
3. Click on Upload Files button. Select the desired file to be attached.
4. In order to see a preview of the attachment, click on the link to the attached document.
5. In the preview, click on Show More dropdown arrow, adjacent to the Public Link button (see screenshot below).


a. Select Edit File Details (see screenshot above).
b. In the Edit popup, fill all the fields (see screenshot below).




i. Title is the only required field
ii. Select the Include in IATI? checkbox. This field indicates that the URL for public link must be added to IATI Organisation XML.

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iii. IATI Publication Date is a date field. This will populate the @iso-date attribute in the document-date element of document-link parent element. The user can enter a desired date for when the attachment is expected to be published on IATI.

iv. IATI Document Category field is picklist field. This will populate the @code attribute in category element of document-link parent element. The user can select the type of document that is being attached with the IATI Organisation XML.

## Validating data

### Validating data in a report

Users can validate the data before generating the XML by reviewing the following Salesforce report: IATI Organization Required Fields (see steps below). This will allow the user to check whether the information in the XML is correct or not, and whether there are any formatting or data issues which would cause the XML to be rejected upon upload to IATI registry.

If an issue is found during the XML review, then the user would need to go back and update the necessary information in Salesforce. Subsequently, the XML would need to be generated again.

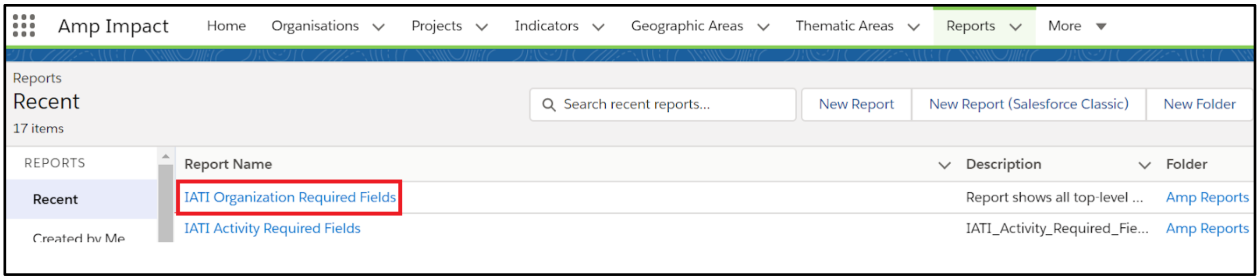
The report has only two fields (see below) because only these IATI fields are required to consider the Organisation Standard XML as complete. However, an organisation may choose to have more required fields to consider the Organisation Standard XML as complete. The user can modify the report accordingly. The report will indicate where the information is missing. Reports are filtered to only the current Project.

Both the required IATI fields sit on the Account object:

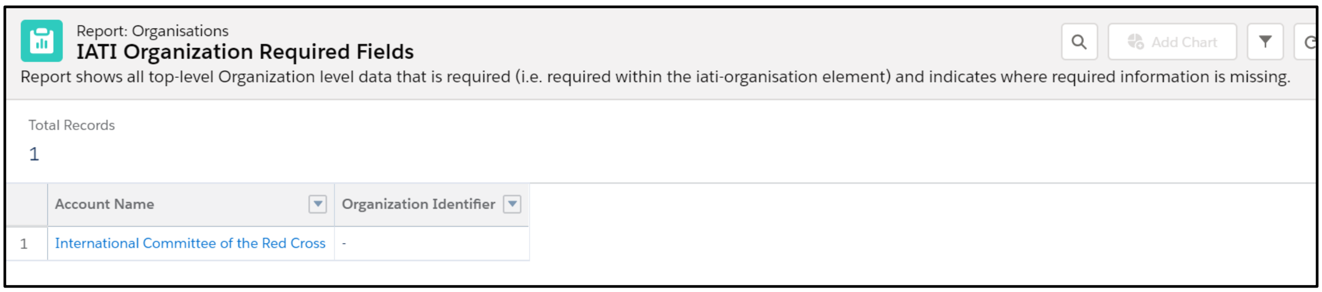
1. Organization Identifier field
2. Account Name field

In order to review IATI Organization Required Fields report record, follow the steps below:

1. Navigate to Reports object



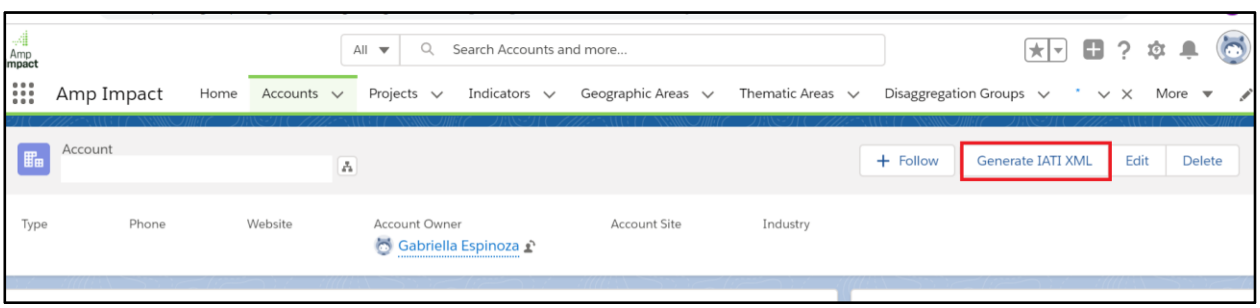

2. Click on the Report Name record called IATI Organization Required Fields



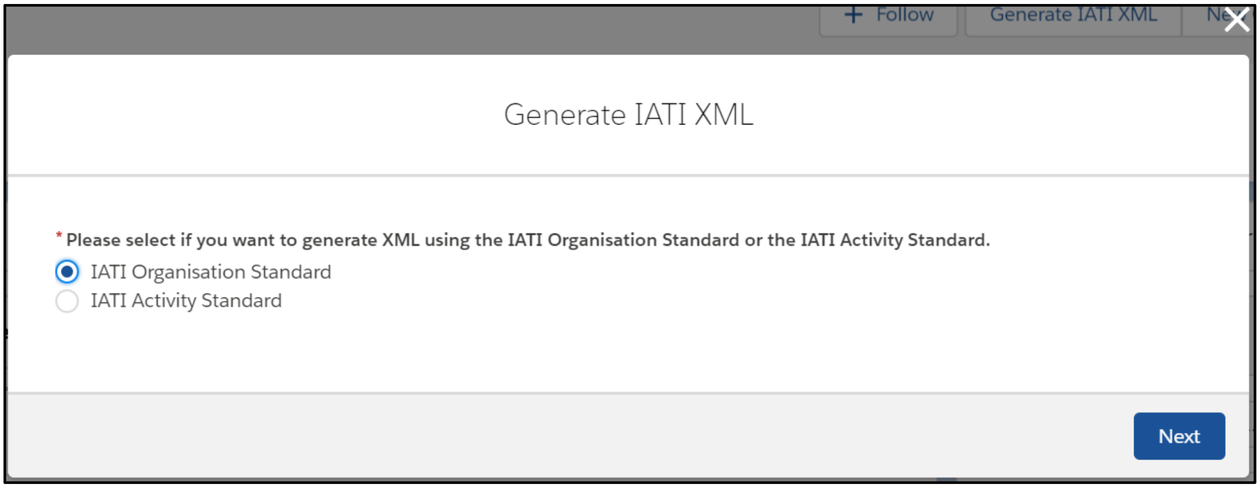

## Accessing the public link to download the XML

Once the user has reviewed IATI data for publishing, follow the steps below to generate the IATI Organisation XML:

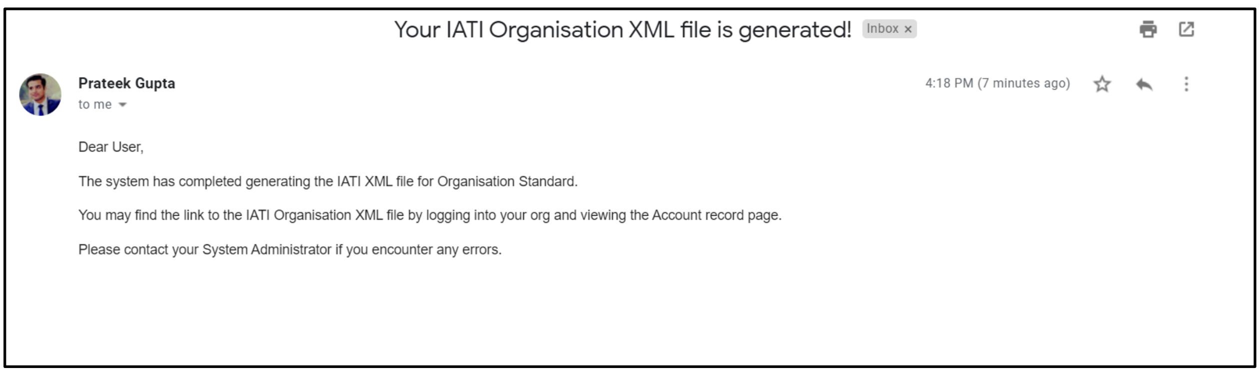
1. Navigate to an Account record. Click on Generate IATI XML button



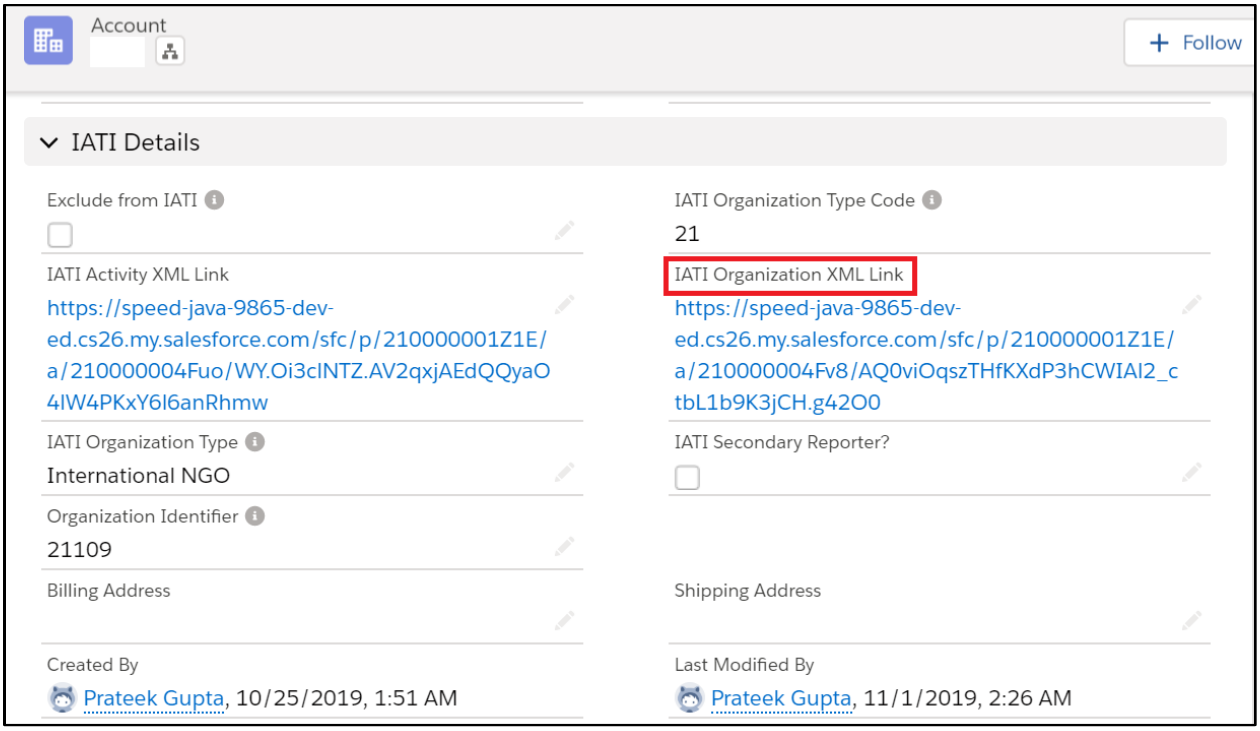

2. Select the IATI Organisation Standard in the popup




3. An email notification will be sent to the user when the XML is generated




4. Navigate to IATI Details section on Account Detail record page
5. *IATI Organisation XML Link* field will contain the URL when the public link of the XML is generated




6. Click on the URL. This would open a new tab with a preview of the XML.
7. Click on Download.

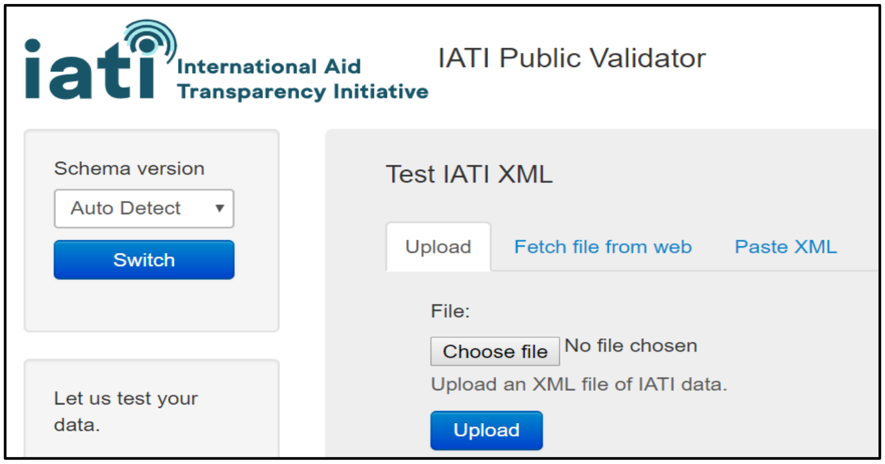
ⓘ **NOTE**: After the XML has been downloaded, choose a compatible platform to open the file i.e. Safari, Internet Explorer, Google Chrome etc

## Validating the public link for IATI Organisation Standard

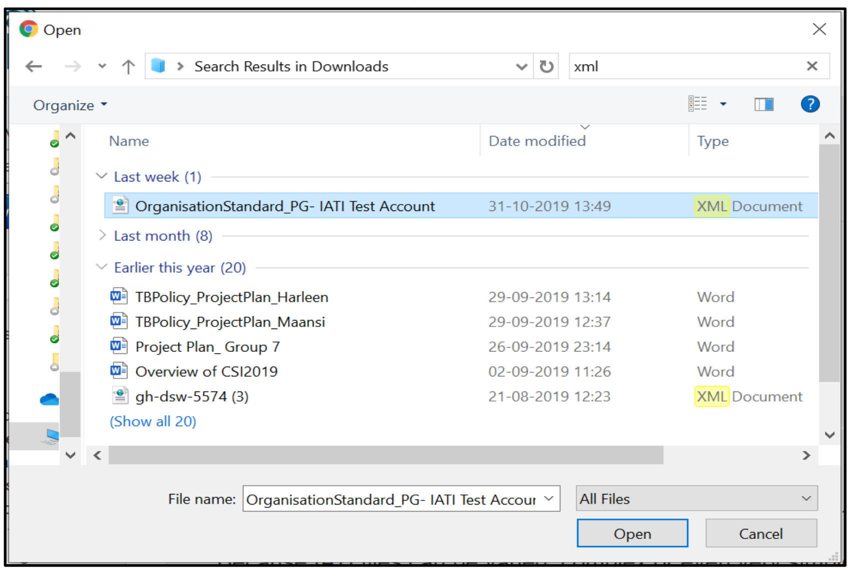
ⓘ **NOTE**: This method of validation can only be used after the XML has been **downloaded**. Due to a Salesforce limitation which prevents IATI from being able to read the content of the XML through the URL for public link, copying the public link into the "Fetch from web" tab of the IATI Public Validator tool is not supported.

Users can validate their IATI Organisation XML file by uploading it on IATI's public validator website. To do this, follow the steps below:

1. Open IATI Public Validator tool.
2. Click on Choose File button (see screenshot below).




3. Select the downloaded copy of IATI Organisation XML.




4. Click on Upload button on the website (see the screenshot below step 2).

If the XML file uploads successfully then the URL for public link is ready to be published on IATI website

## Uploading the Organisation XML file

Upload the IATI Organisation XML file on this page [IATI  data publishing]

## IATI Activity

IATI defines an 'activity' as any piece of work an organisation does. Any humanitarian work undertaken by a development cooperation can count as an activity. An IATI Activity is equivalent to a Project record in Amp Impact.

### 1. Setup

Prior to setting up IATI data, the user needs to take certain preliminary steps to setup a Project record for preparing to create an IATI Activity XML.

Refer to the steps mentioned in the General User guide of Amp Impact for setting up the following:

1. Create a Project record
2. Create Reporting Periods (RPs)
3. Create Geographic Areas (GAs)
    a. Create Project Geographic Areas (PGAs)
4. Create Project Indicators (PIs) related to RPs and GAs
    a. Add Project Indicators from Indicators Catalog tab
    b. Create custom Project Indicators from Selected Indicators tab
5. Entering Result Values for a Project Indicator

### 2. Filling all IATI Fields

All the IATI fields listed the *IATI-Amp Impact Data Mapping for Implementers* Guide (format: Excel) must be filled out in order to generate an IATI Activity Standard XML.

### 3. Setting up your IATI Data

The first step of creating an XML for IATI Activity is to ensure that data is setup. In order to set up data for an Activity XML to be downloaded, data for the following has to be entered:

| **Theme of data to be entered** | **Point of entry within Amp Impact** |
|---|---|
| Transactions | New record on Allocation, Disbursement and Financials objects |
| IATI Activity | Details tab of Project record |
| Budget | Budget related list on Project |
| Framework Items | New record on Project Objective |

| | |
|---|---|
| Targets and Results for Project Indicators | SetTargets / AddResults tab(s) on Project; also displayed on the Setup tab of Project record |
| Sector/Purpose of IATI Activity | New record on Project IATI Sectors object; also displayed on the Setup tab of Project record |
| Policy addressed by IATI Activity | New record on Project IATI Policy object; also displayed on the Setup tab of Project record |
| Organisation involved with IATI activity | New record on Organisation Roles object; also displayed on the Setup tab of Project record |
| Person associated with an IATI Activity | New record on Project Roles object; also displayed on the Setup tab of Project record |

## 4. Validating data

### Validating data in a report

Users can validate the data before generating the XML by reviewing the following Salesforce Report: IATI Activity Required Fields (see steps below). This will allow the user to check whether the information in the XML is correct or not, and whether there are any formatting or data issues which would cause the XML to be rejected upon upload to IATI registry.

If an issue is found during the XML review, then the user would need to go back and update the necessary information in Salesforce. Subsequently, the XML would need to be generated again.

The report has 66 fields (see below) because only these IATI fields are required to consider the Activity Standard XML as complete. However, an organisation may choose to have more required fields to consider the Activity Standard XML as complete. The user can modify the report accordingly. The report will indicate where the information is missing. Reports are filtered to only the current Project.

| S. No | Amp/Standard Object | Amp/Standard Field |
|---|---|---|
| 1 | Account | Organization Identifier |
| 2 | Account | IATI Organization Type Code |

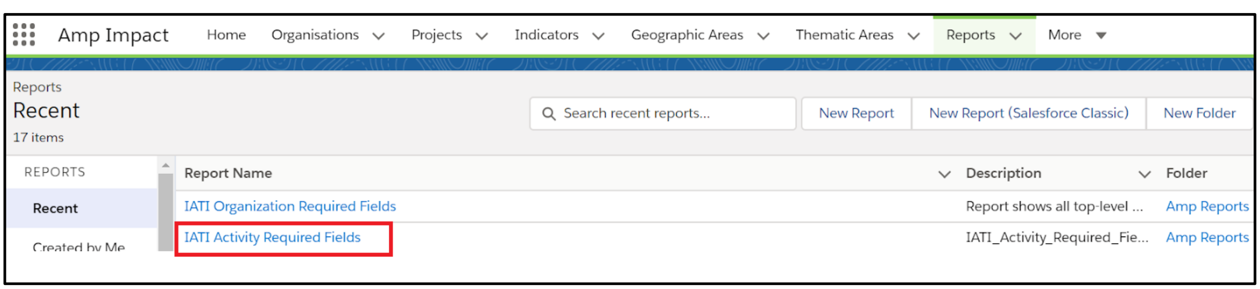
| | | |
|---|---|---|
| 3 | Account | Name |
| 4 | Contact | Name |
| 5 | Contact | Mailing Address |
| 6 | Budget | IATI Vocabulary |
| 7 | Budget | Start Date |
| 8 | Budget | End Date |
| 9 | Budget | Planned Expenditure |
| 10 | Budget | IATI Value Date |
| 11 | ContentVersion | Title |
| 12 | ContentVersion | Description |
| 13 | ContentVersion | IATI Document Category |
| 14 | ContentVersion | IATI Publication Date |
| 15 | Reporting Period | Reporting Period Start Date |
| 16 | IATI Policy | Policy Marker Code |
| 17 | Disbursement | IATI Value Date |
| 18 | Financial | IATI Code |
| 19 | Financial | Description |
| 20 | Financial, Disbursement, Allocation | IATI Transaction Date |
| 21 | Financial, Disbursement, Allocation | Amount Actual |
| 22 | Financial, Disbursement, Allocation | Amount |
| 23 | Financial, Disbursement, Allocation | IATI Flow Type |
| 24 | Financial, Disbursement, Allocation | IATI Finance Type |
| 25 | Financial, Disbursement, Allocation | IATI Aid Type |
| 26 | Financial, Disbursement, Allocation | IATI Tied Status |
| 27 | Objective | IATI Result Type |

| | | |
|---|---|---|
| 28 | Objective | Label |
| 29 | Objective | Description |
| 30 | Objective | IATI Code |
| 31 | Objective | IATI Vocabulary |
| 32 | Organisation Role | IATI Role Code |
| 33 | Project | IATI Activity Identifier |
| 34 | Project | Name |
| 35 | Project | IATI Project Status |
| 36 | Project | IATI Project Status Code |
| 37 | Project | Planned Start Date |
| 38 | Project | Planned End Date |
| 39 | Project | Start Date |
| 40 | Project | End Date |
| 41 | Project | IATI Activity Scope |
| 42 | Project | IATI Humanitarian Scope Code |
| 43 | Project | IATI Humanitarian Scope Vocabulary |
| 44 | Project | IATI Humanitarian Scope Code2 |
| 45 | Project | IATI Collaboration Type Code |
| 46 | Project | IATI Flow Type Code |
| 47 | Project | IATI Aid Type Code |
| 48 | Project | IATI Tied Status Code |
| 49 | Project | IATI Capital Spend |
| 50 | Project | IATI Condition Attached |
| 51 | Project | Description or IATI Objectives or IATI Target Groups or Other |

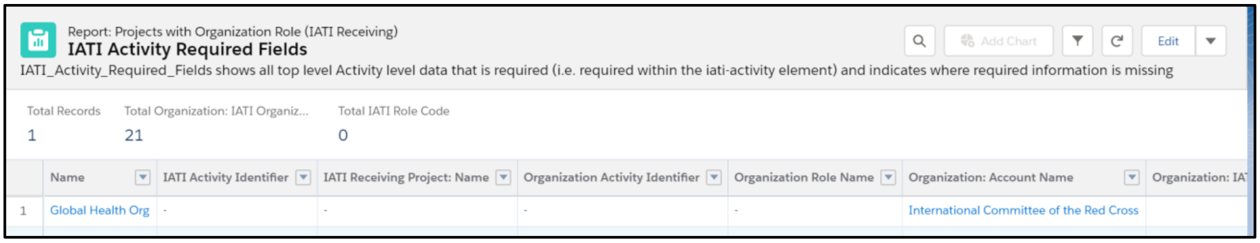
| | | |
|---|---|---|
| 52 | Project IATI Sector | DAC 5 Digit Sector Code or DAC 3 Digit Sector Code |
| 53 | Project Geographic Area | IATI Country Code |
| 54 | Project Geographic Area | IATI Region Code |
| 55 | Project Geographic Area | IATI Location Reach |
| 56 | Project Geographic Area | IATI Code |
| 57 | Project Geographic Area | IATI Geographic Vocabulary |
| 58 | Project Geographic Area | IATI Exactness |
| 59 | Project Geographic Area | IATI Location Class |
| 60 | Project Geographic Area | IATI Feature Designation |
| 61 | Project Indicator | Data Type |
| 62 | Project Indicator | IATI Description |
| 63 | Project Indicator | IATI Vocabulary |
| 64 | Project Indicator | Indicator Code or External Code |
| 65 | Transaction Project IATI Sector | DAC 3 Digit Sector Code or DAC 5 Digit Sector Code |
| 66 | Project Indicator Reporting Period | Parent Reporting Period End Date |

In order to review IATI Activity Required Fields report record, follow the steps below:

1. Navigate to Reports object




2. Click on the Report Name record called IATI Activity Required Fields

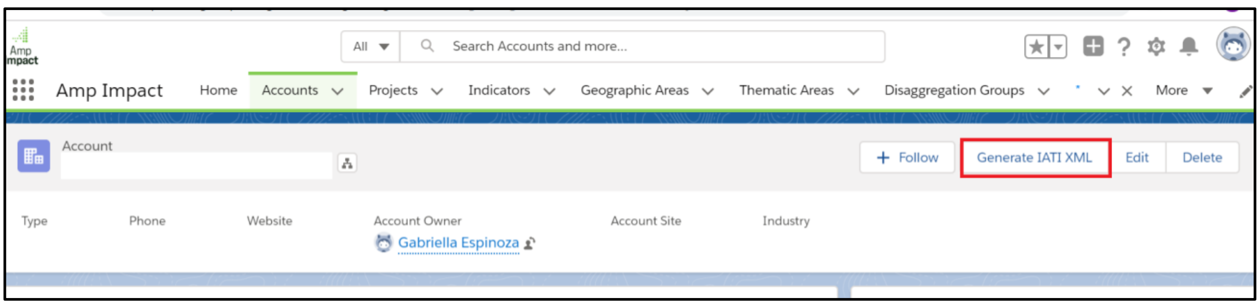



**ⓘ NOTE:** If a user includes qualitative and milestone indicators in a project, their target and actual values from SetTargets and AddResults pages are not printed in IATI Activity XML.

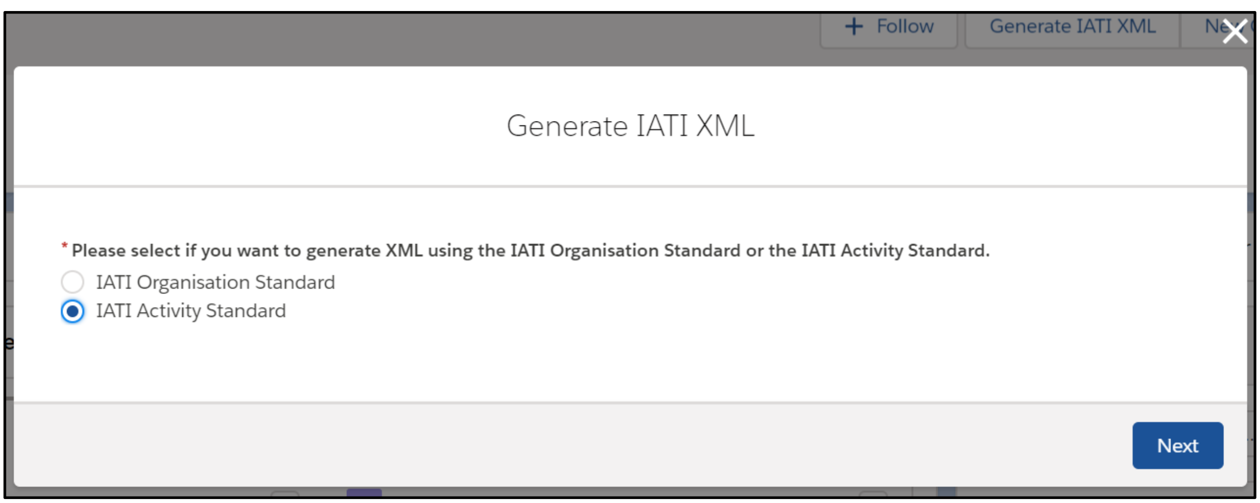
## 5. Accessing the public link to download the XML

Once the user has reviewed IATI data for publishing, follow the steps below to generate the IATI Activity XML:

1. Navigate to an Account record. Click on Generate IATI XML button

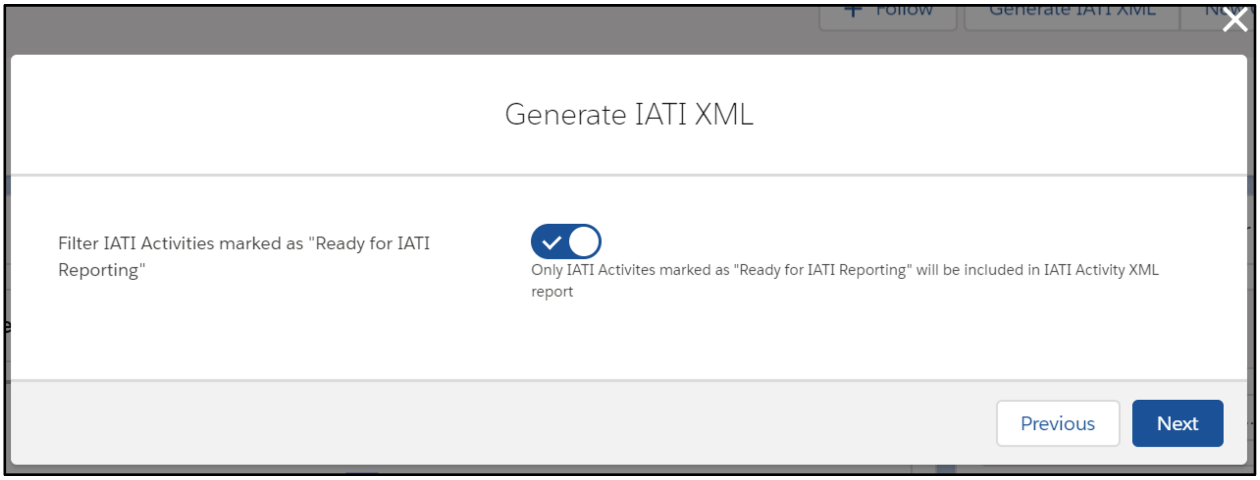



2. Select the IATI Activity Standard in the popup

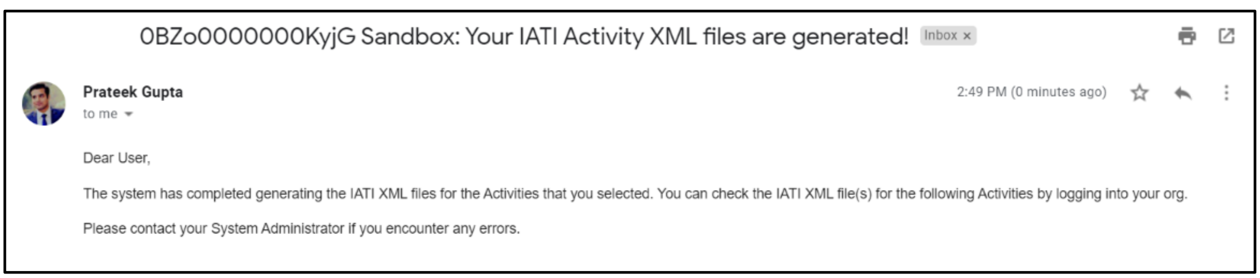


3. Toggle the slider button labelled as Ready for IATI Reporting to display a list of IATI Activities/Project records that are ready for IATI publishing

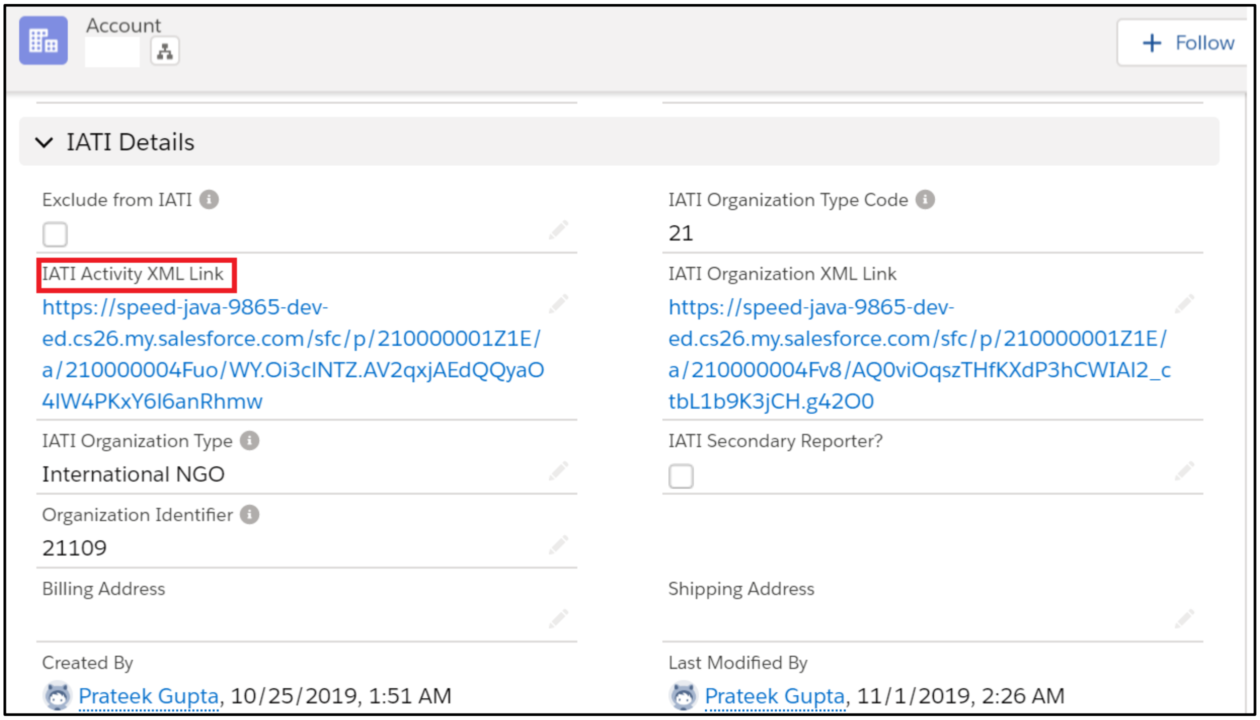
> ⓘ **NOTE**: The filter below comes out-of-the-box with Amp Impact. In order to customise the existing filter or to add new filters, contact the System Administrator in your organisation.




4. An email notification will be sent to the user when the XML is generated




5. Navigate to IATI Details section on Account Detail record page
6. IATI Activity XML Link field will contain the URL when the public link of the XML is generated




7. Click on the URL. This would open a new tab with a preview of the XML.
8. Click on Download.

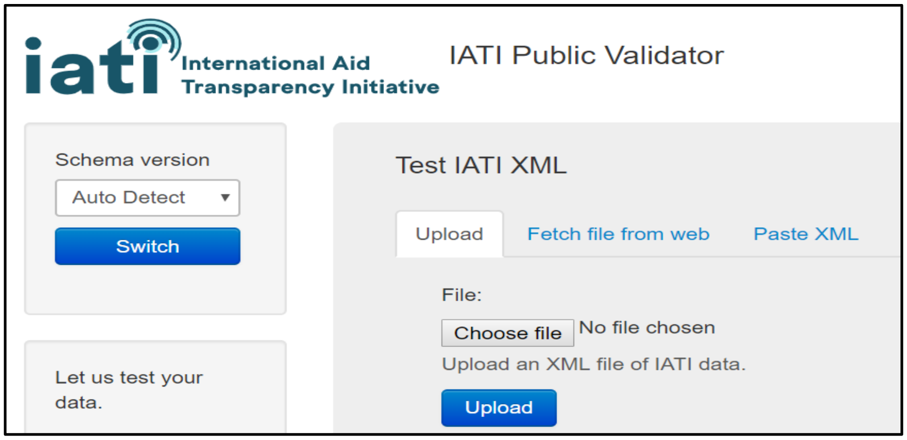
> ⓘ **NOTE:** After the XML has been downloaded, choose a compatible platform to open the file i.e. Safari, Internet Explorer, Google Chrome etc

## 6. Validating the public link for IATI Activity Standard

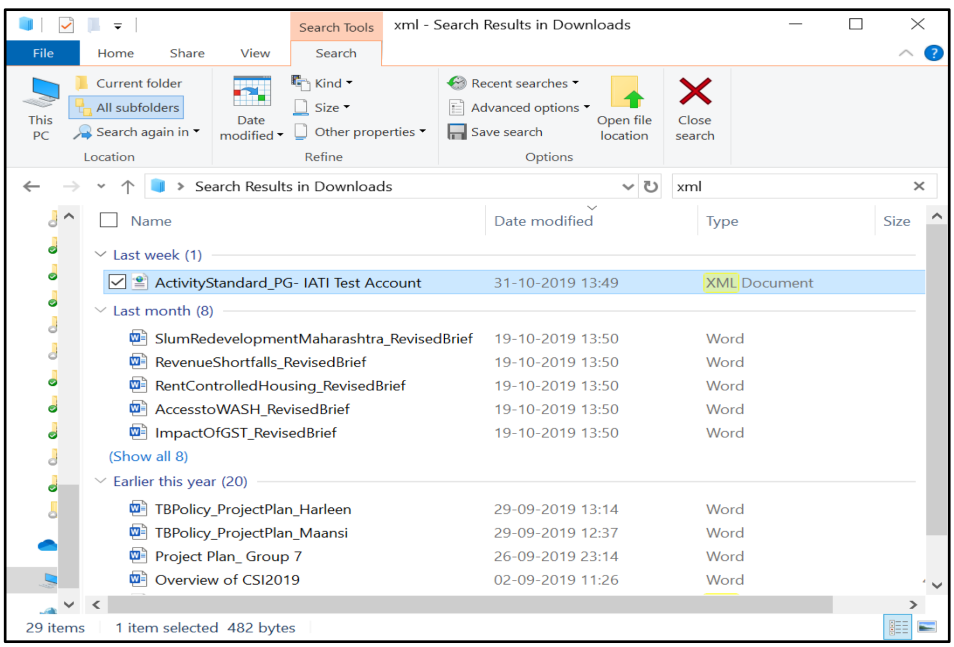
> ⓘ **NOTE:** This method of validation can only be used after the XML has been downloaded. Due to a Salesforce limitation which prevents IATI from being able to read the content of the XML through the URL for public link, copying the public link into the “Fetch from web” tab of the IATI Public Validator tool is not supported.

Users can validate IATI Activity XML file by uploading it on IATI’s public validator website. To do this, follow the steps below:

1. Open IATI Public Validator tool.
2. Click on Choose File button (see screenshot below).




3. Select the downloaded copy of IATI Activity XML (see screenshot below).




4. Click on Upload button on the website (see screenshot below step 2).

If the XML file uploads successfully then the URL for public link is ready to be published on IATI website

## Uploading the Activity XML file

Upload the IATI Activity XML file on this page: [IATI data publishing]