

IATI User Guide

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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
3. Validate IATI data
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
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](#).



Amp Impact

IATI Term	Corresponding Amp Term	Definition
Organisation Standard	Account	<p>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.</p> <p>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.</p>
Activity Standard	Project	<p>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.</p> <p>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.</p>
Location	Geographic Area	<p>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.</p>
Budget-item	Financial	<p>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.</p>
Result	Objective	<p>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.</p>
Actual	Result	<p>This is a record of the achieved result for the current period</p>

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:

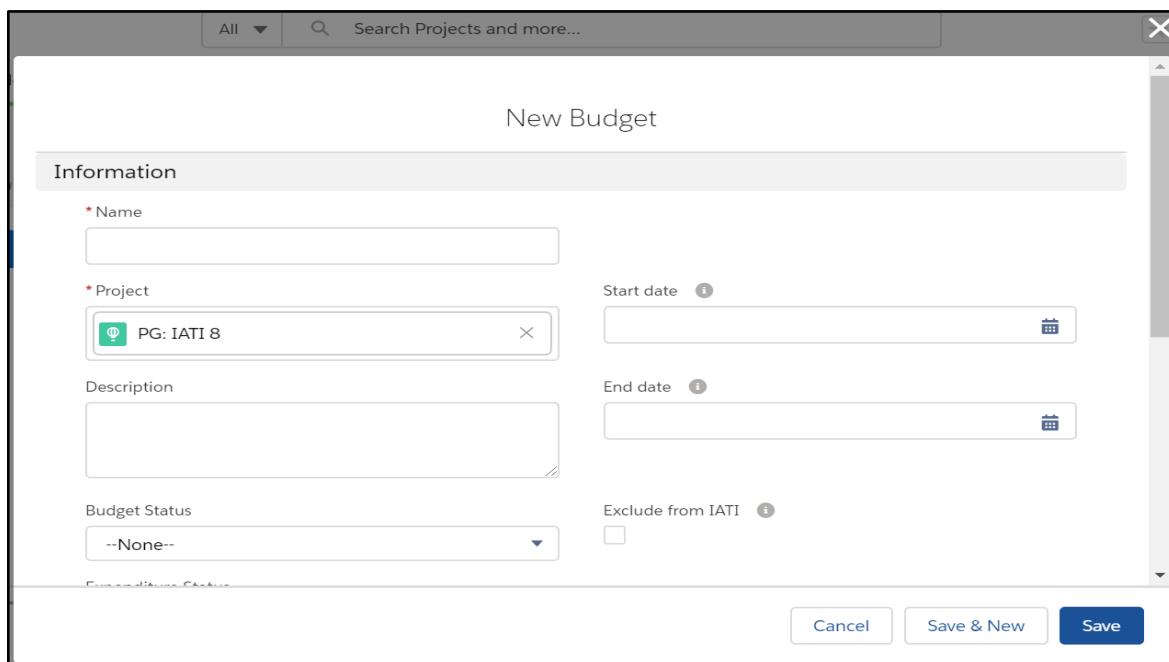
- a. Create a Project record
- b. Create Reporting Periods (RPs)

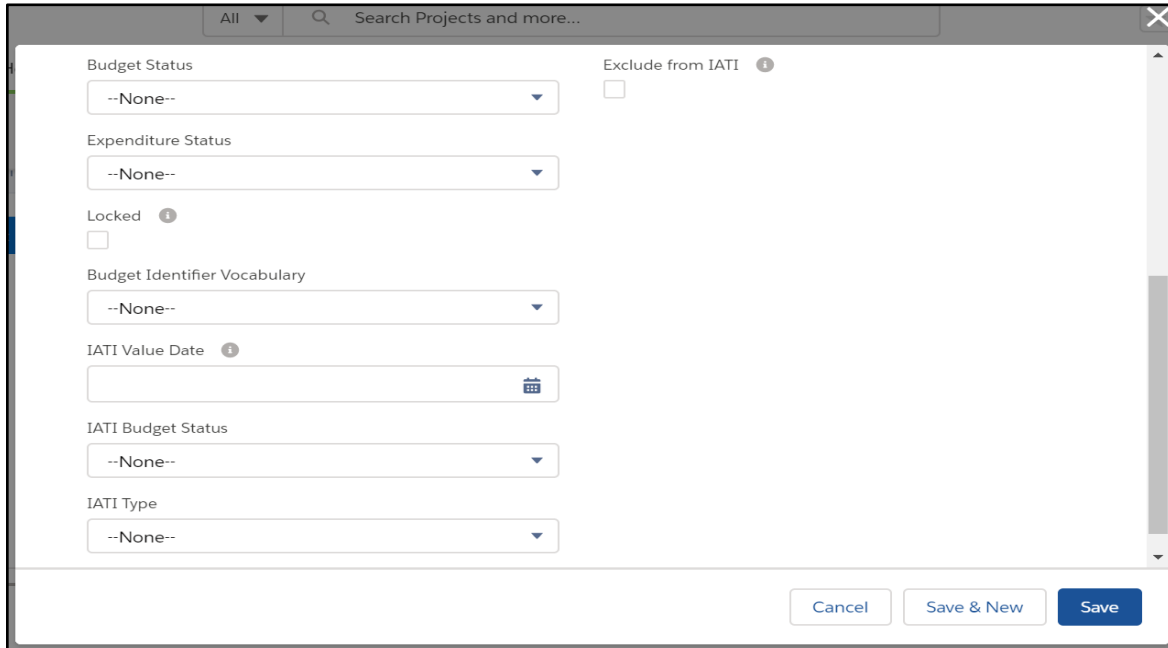
2. Setting up your IATI Data

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:

A screenshot of the "New Budget" form in the Amp Impact application. The form is titled "New Budget" and is divided into several sections. The "Information" section includes fields for "Name", "Project" (with a dropdown menu showing "PG: IATI 8"), "Description", "Start date", "End date", "Budget Status" (with a dropdown menu showing "--None--"), and "Exclude from IATI" (with a checkbox). The "Expenditure Status" section is partially visible at the bottom. At the bottom right of the form, there are three buttons: "Cancel", "Save & New", and "Save". The form is displayed in a window with a search bar at the top and a close button in the top right corner.



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:

Search Financials and more...

New Financial

Information

* Name

Type

* Budget

Category

[View all dependencies](#)

* Reporting Period

Subcategory

[View all dependencies](#)

Activity

IATI Tied Status

Code

IATI Flow Type

Search Financials and more...

IATI Disbursement Channel

IATI Aid Type Category

IATI Value Date

IATI Finance Type Category

IATI Transaction Date

IATI Transaction Type

IATI Percentage

IATI Finance Type

IATI Humanitarian

IATI Aid Type

IATI Organization Role

IATI Aid Type Vocabulary

Line Item Details

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

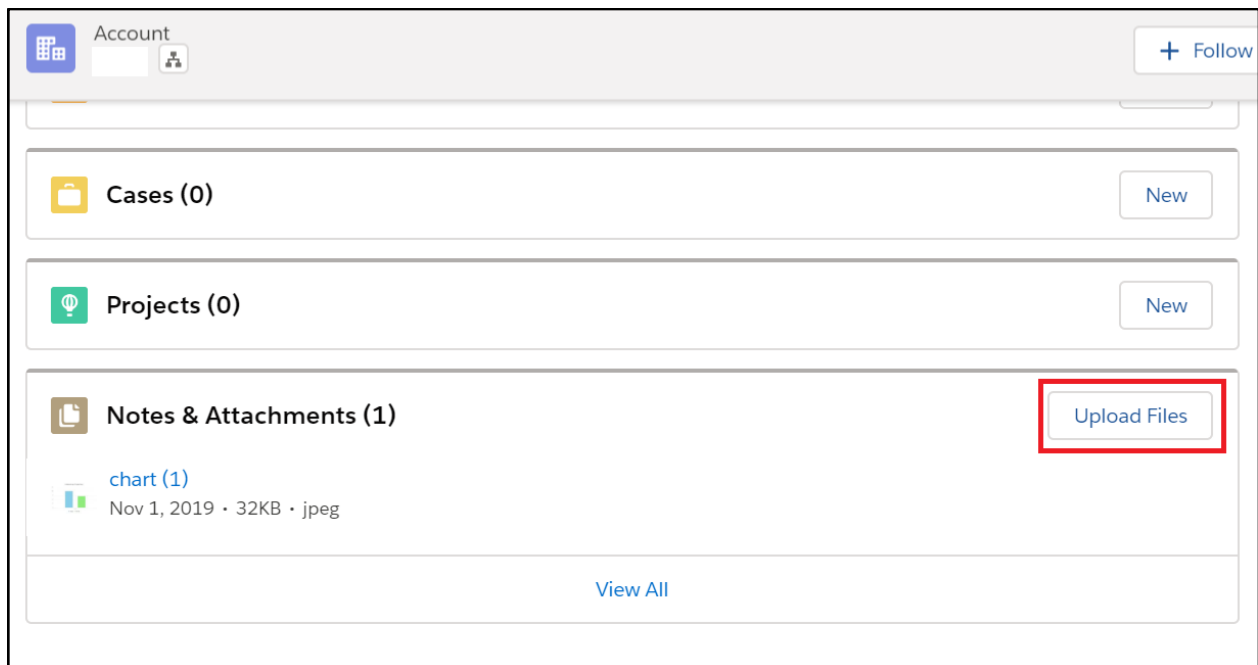
III) Adding Attachments

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.

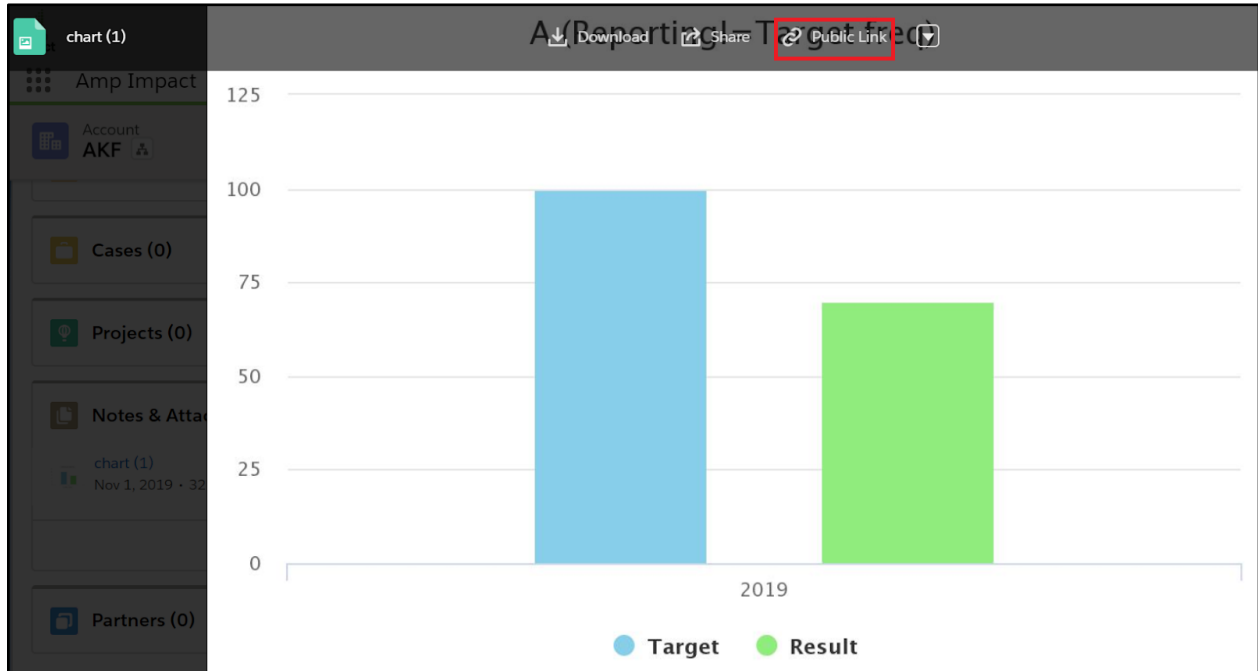
ⓘ NOTE: The field `ampi__Include_in_IATI__c` must be set to TRUE in order for the attachment to display in the XML. In addition, ensure that the URL for public link to the attachment is generated before the XML is generated.

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

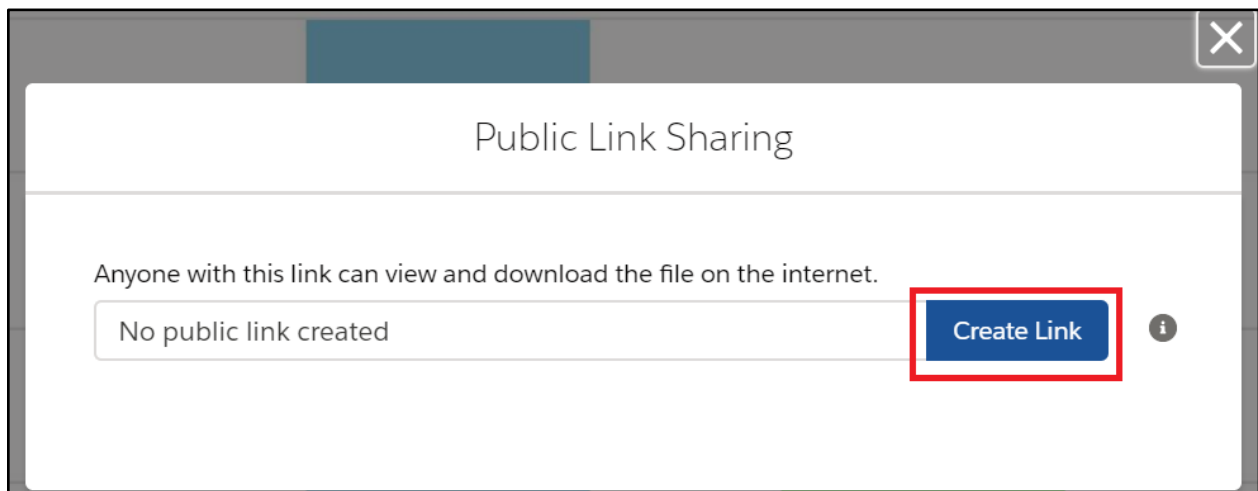
1. Navigate to the Accounts object. Open an Account record
2. In the Related list, scroll down to Notes and Attachments section
3. Click on Upload Files button (see screenshot below). Select the desired file to be attached



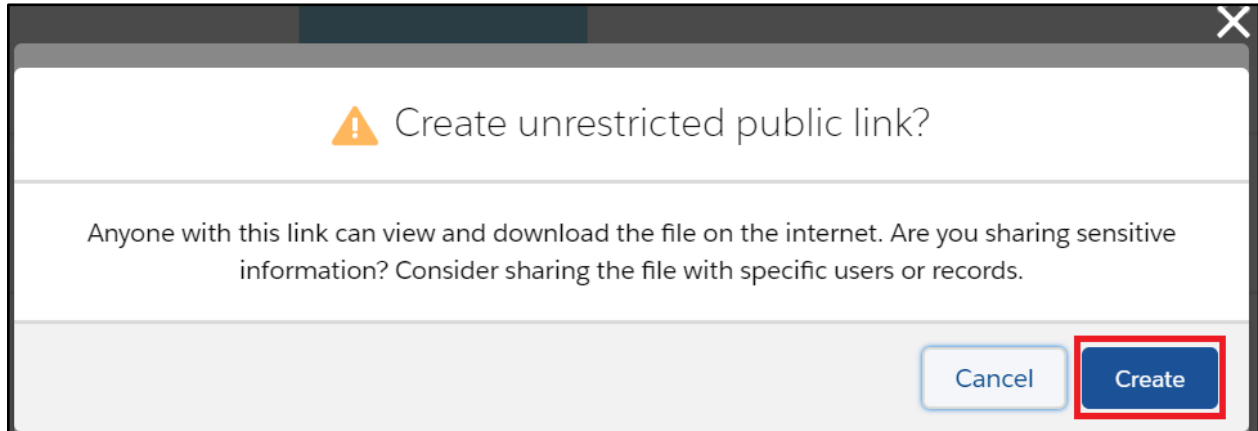
4. In order to see a preview of the attachment, click on the link to the attached document
5. Click on the Public Link button (see screenshot below)



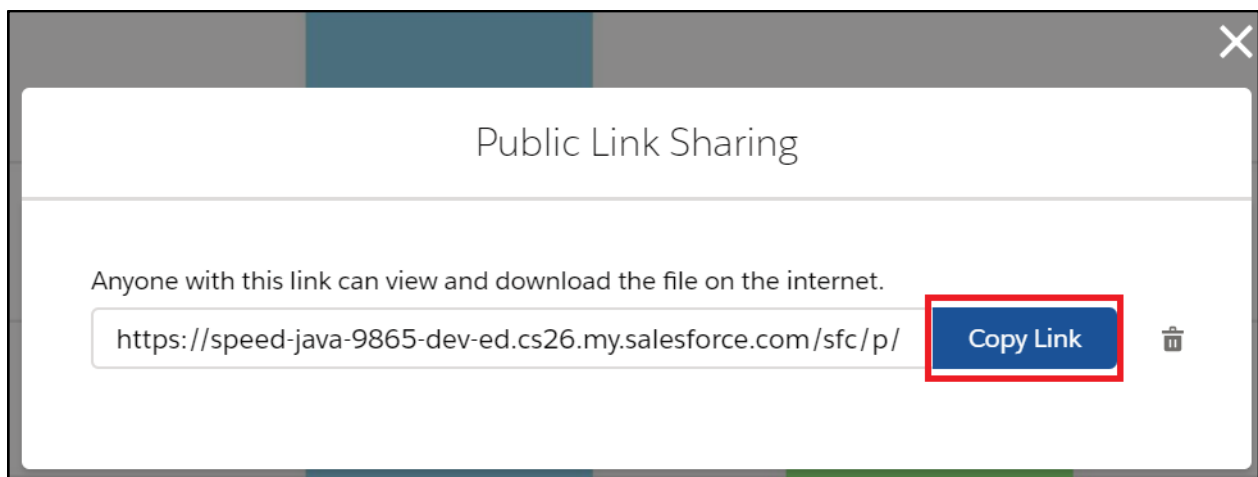
6. In the Public Link Sharing popup, click on the Create Link button (see screenshot below)



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.

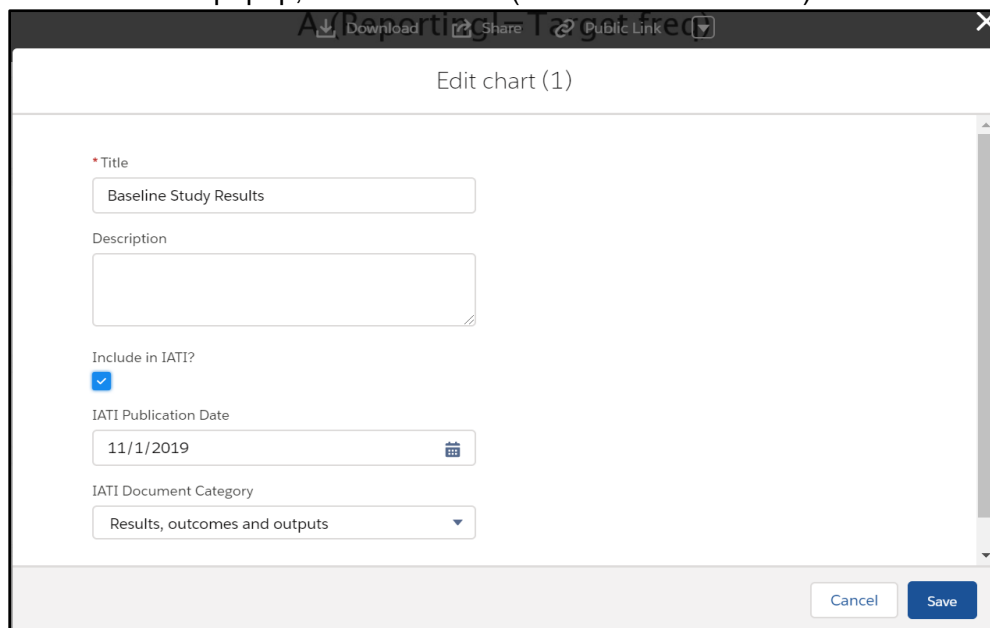


Amp Impact

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).



The screenshot shows the 'Edit chart (1)' popup form. It contains the following fields:

- Title: Baseline Study Results
- Description: (empty text area)
- Include in IATI?:
- IATI Publication Date: 11/1/2019
- IATI Document Category: Results, outcomes and outputs

Buttons: Cancel, Save

- 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.
- 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.

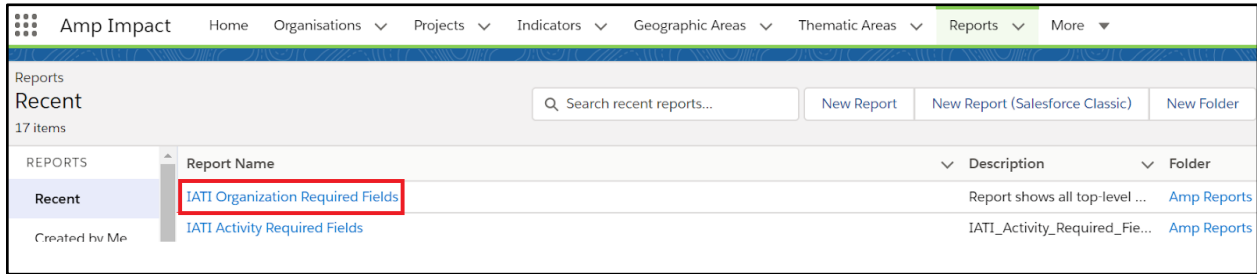
The report has only two fields (see below) because only these IATI fields are required to consider the Organisation Standard XML as complete. However, an organisation may choose to have more required fields to consider the Organisation Standard XML as complete. The user can modify the report accordingly. 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:

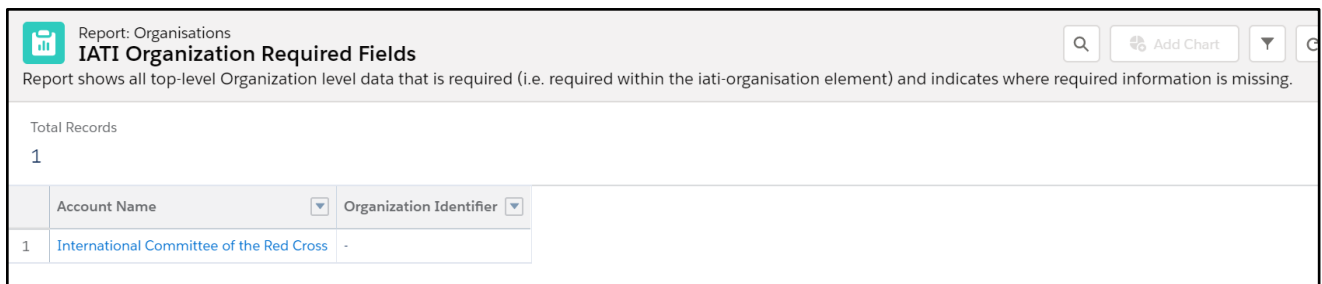
1. Organization Identifier field
2. Account Name field

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

1. Navigate to Reports object



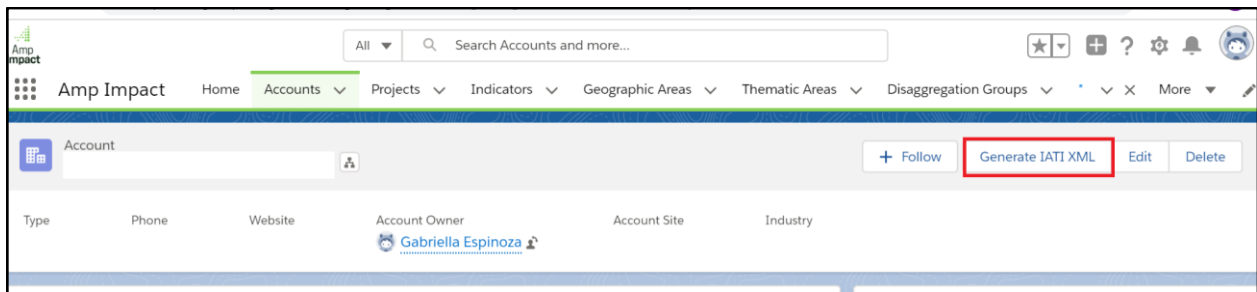
2. Click on the Report Name record called IATI Organization Required Fields



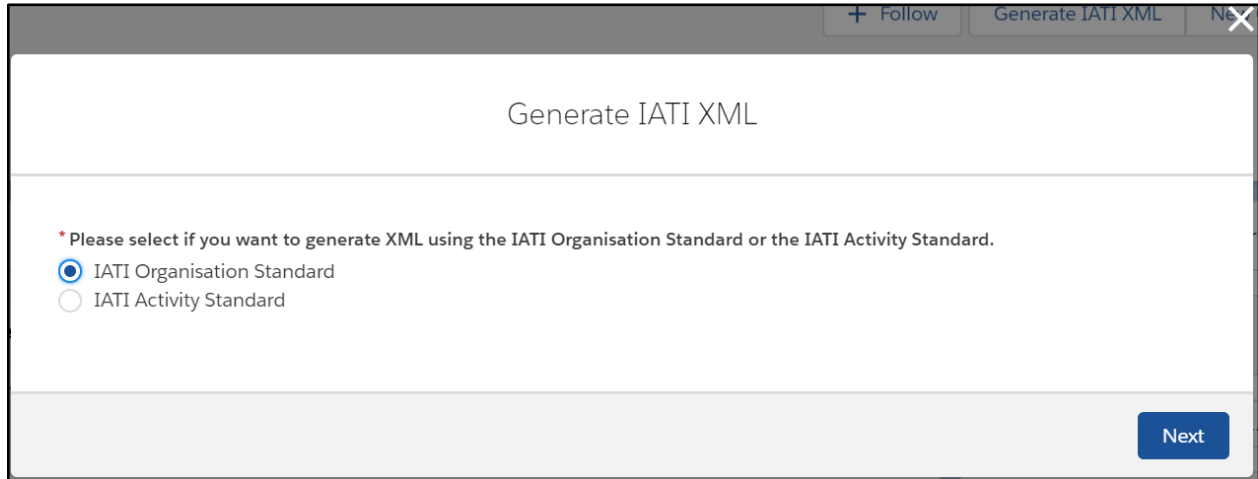
Accessing the public link to download the XML

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



+ Follow Generate IATI XML Ne X

Generate IATI XML

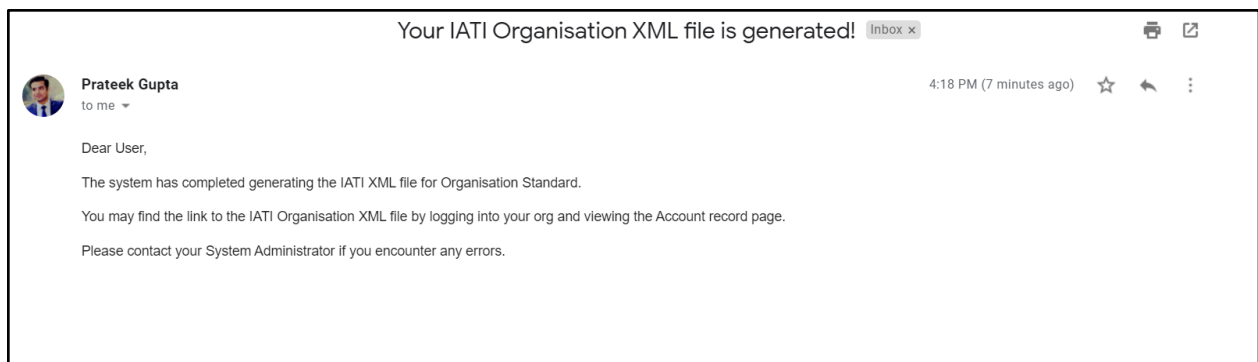
* Please select if you want to generate XML using the IATI Organisation Standard or the IATI Activity Standard.

IATI Organisation Standard

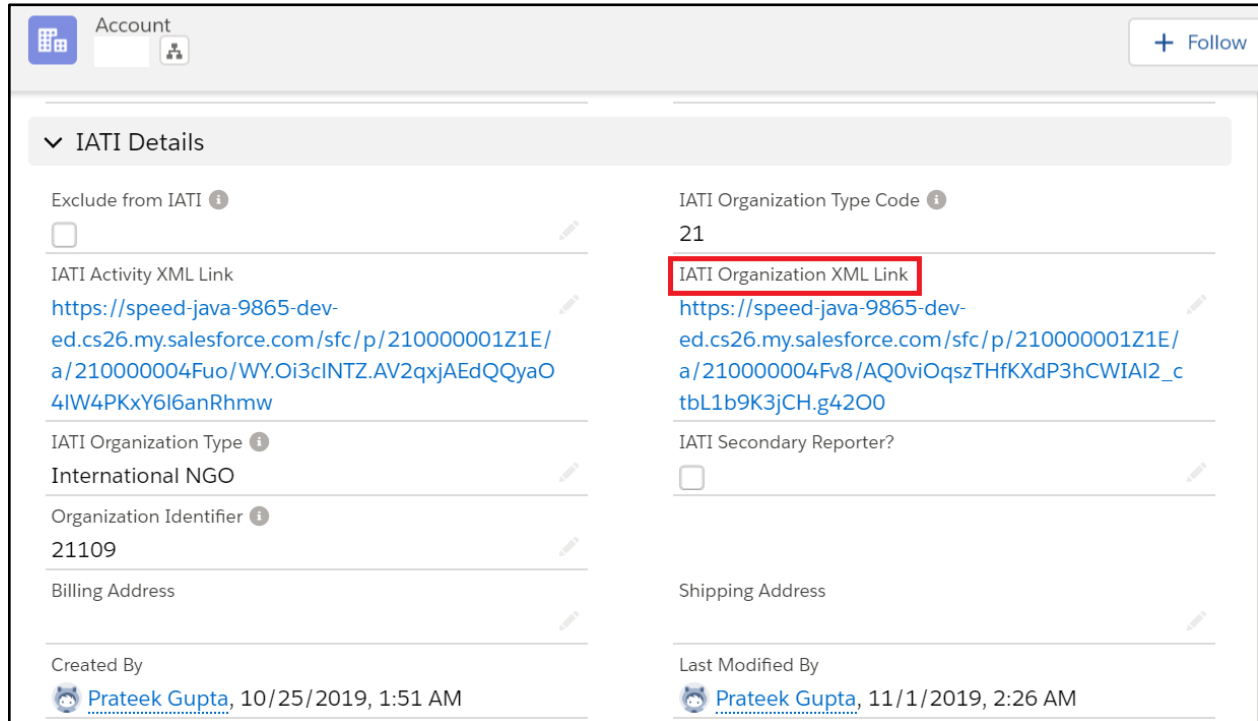
IATI Activity Standard

Next

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



The screenshot shows a Salesforce account page for 'Account'. Under the 'IATI Details' section, there are two columns of fields. The 'IATI Organization XML Link' field is highlighted with a red box. The value for this field is a long URL: https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fv8/AQ0viOqsZTHfKXdP3hCWIAI2_c tbL1b9K3jCH.g4200. Other fields include 'Exclude from IATI' (checkbox), 'IATI Activity XML Link', 'IATI Organization Type' (International NGO), 'Organization Identifier' (21109), 'Billing Address', 'Shipping Address', 'IATI Organization Type Code' (21), 'IATI Secondary Reporter?' (checkbox), 'Created By' (Prateek Gupta, 10/25/2019, 1:51 AM), and 'Last Modified By' (Prateek Gupta, 11/1/2019, 2:26 AM).

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

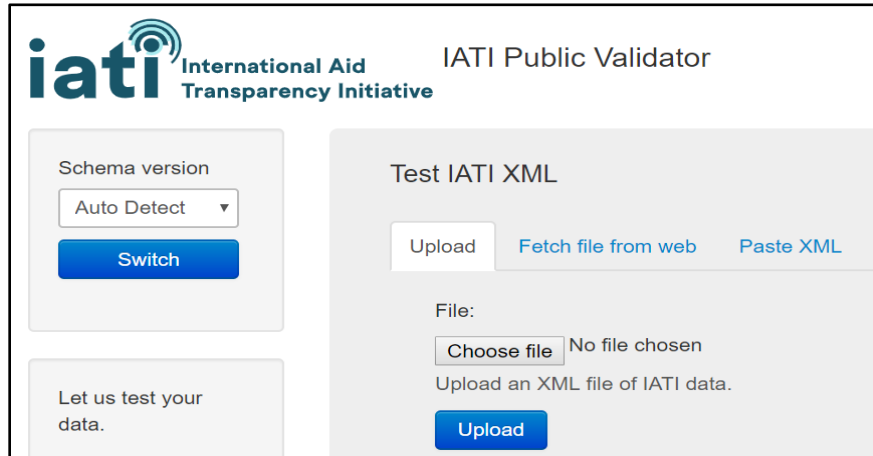
NOTE: After the XML has been downloaded, choose a compatible platform to open the file i.e. Safari, Internet Explorer, Google Chrome etc

Validating the public link for IATI Organisation Standard

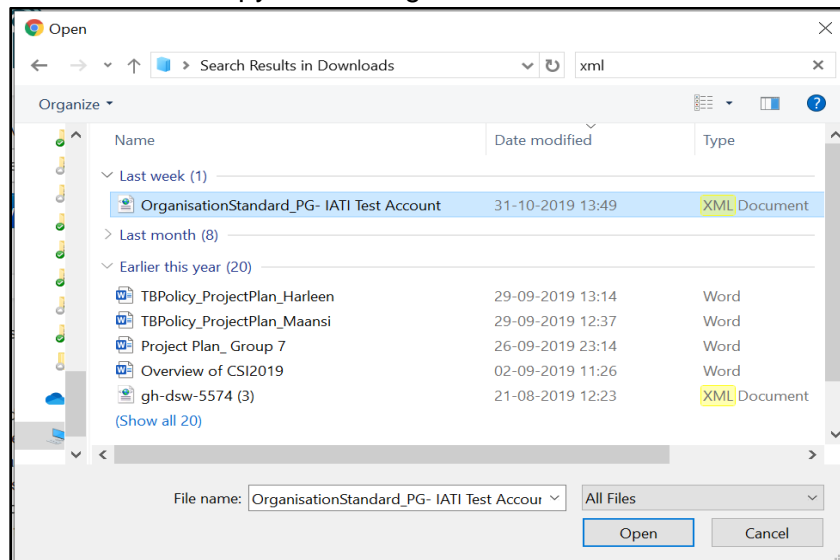
NOTE: This method of validation can only be used after the XML has been downloaded. Due to a Salesforce limitation which prevents IATI from being able to read the content of the XML through the URL for public link, copying the public link into the "Fetch from web" tab of the IATI Public Validator tool 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



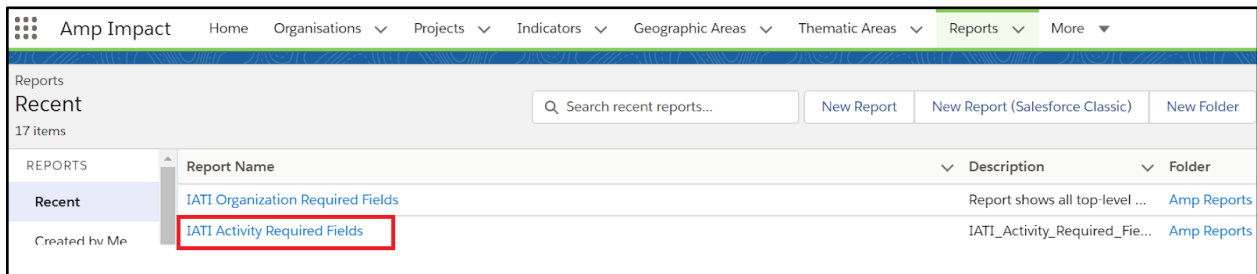
Amp Impact

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

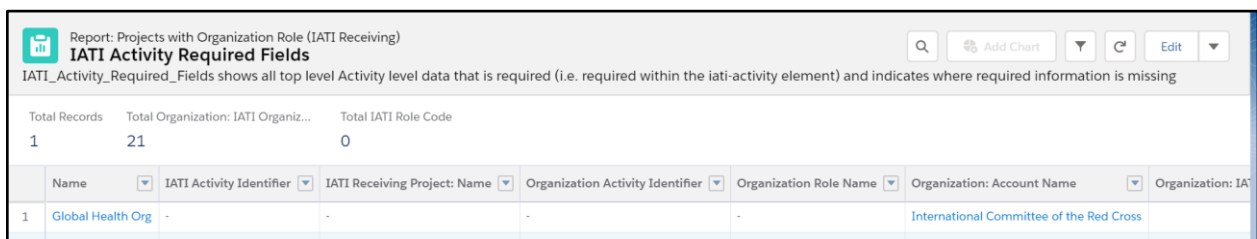
In order to review IATI Activity Required Fields report record, follow the steps below:

1. Navigate to Reports object



The screenshot shows the Amp Impact Reports page. The navigation bar includes Home, Organisations, Projects, Indicators, Geographic Areas, Thematic Areas, Reports, and More. The Reports section is active, showing a list of recent reports. The report 'IATI Activity Required Fields' is highlighted with a red box. The report name is 'IATI Activity Required Fields', the description is 'IATI_Activity_Required_Fie...', and the folder is 'Amp Reports'.

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



The screenshot shows the report record for 'IATI Activity Required Fields'. The report title is 'IATI Activity Required Fields' and the description is 'IATI_Activity_Required_Fields shows all top level Activity level data that is required (i.e. required within the iati-activity element) and indicates where required information is missing'. The report shows 1 total record, 21 total organizations, and 0 total IATI role codes. The data table below shows the following record:

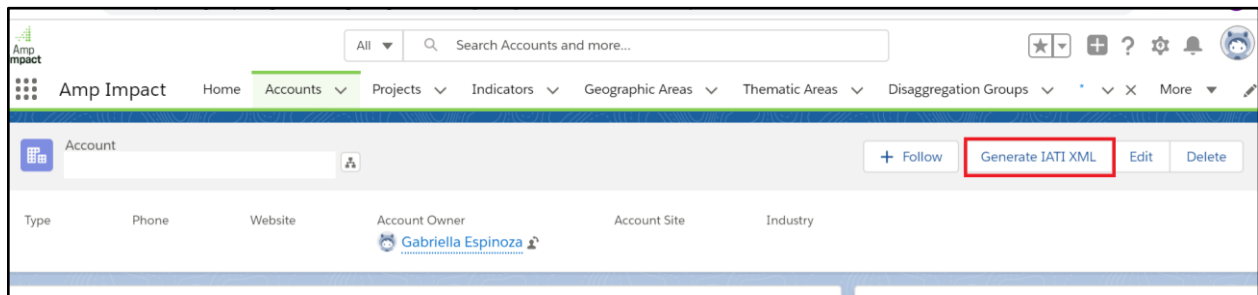
Name	IATI Activity Identifier	IATI Receiving Project: Name	Organization Activity Identifier	Organization Role Name	Organization: Account Name	Organization: IA
1	Global Health Org	-	-	-	International Committee of the Red Cross	-

① 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.

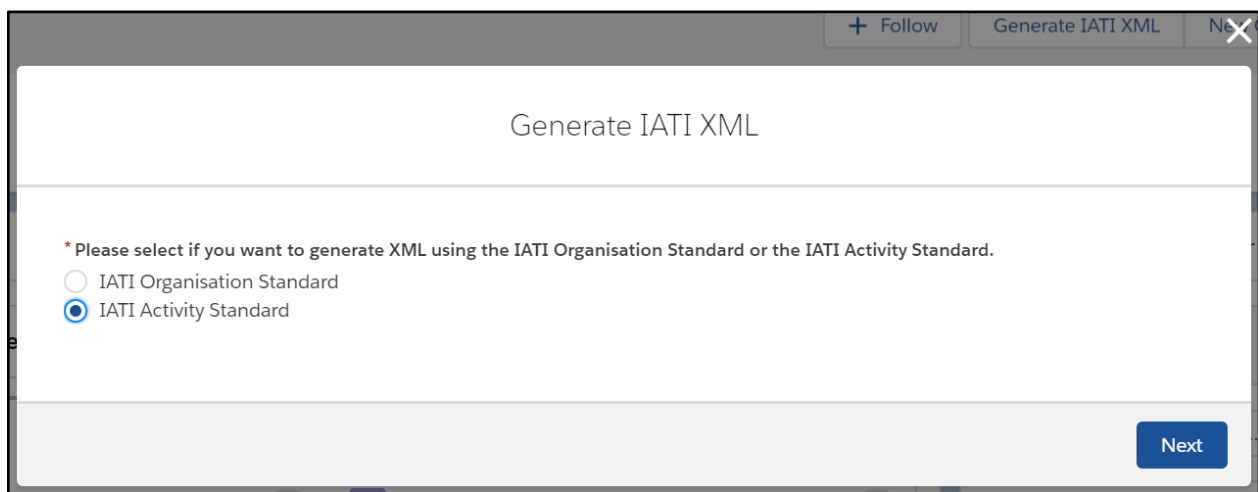
5. Accessing the public link to download the XML

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

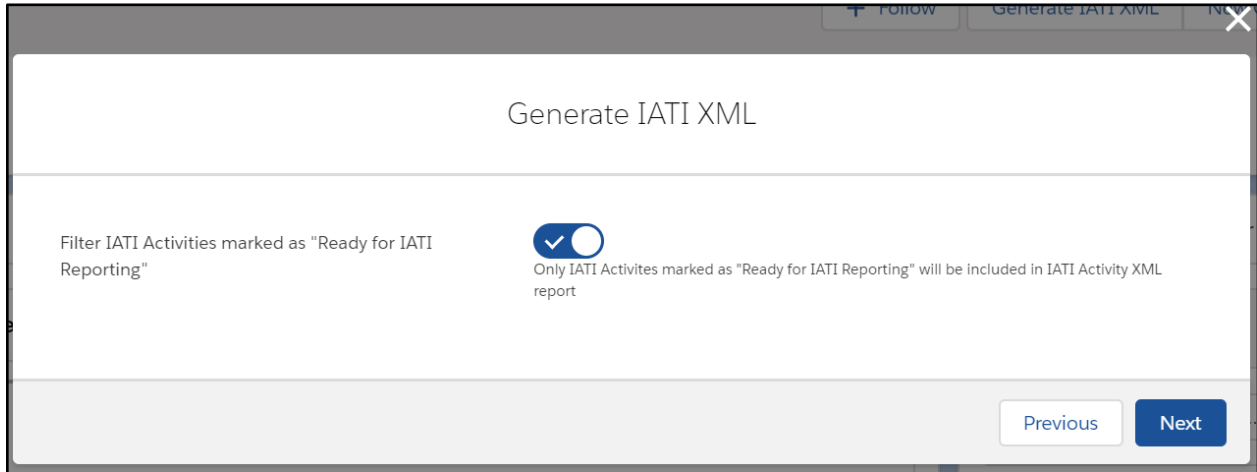


2. Select the IATI Activity Standard in the popup

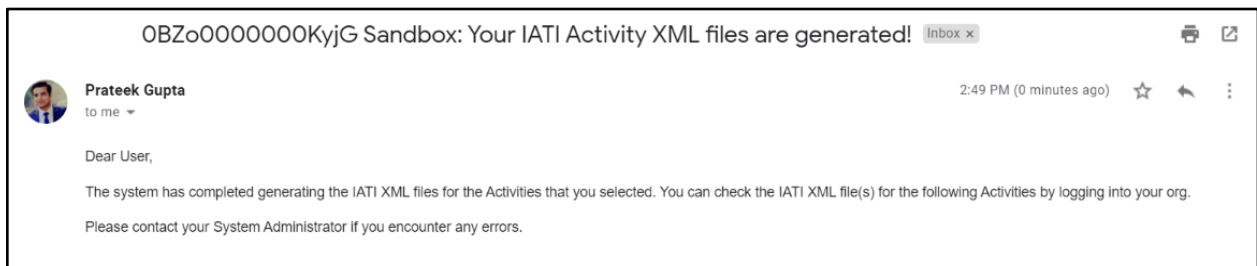


3. Toggle the slider button labelled as Ready for IATI Reporting to display a list of IATI Activities/Project records that are ready for IATI publishing

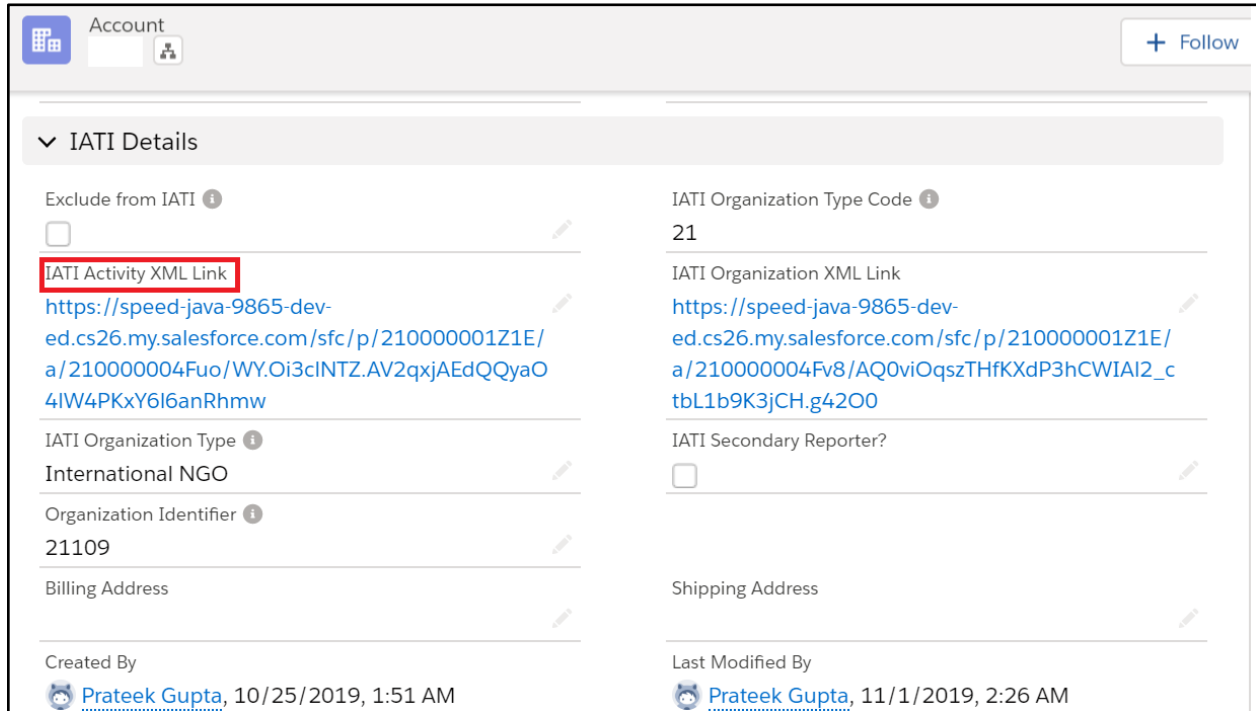
① NOTE: The filter below comes out-of-the-box with Amp Impact. In order to customise the existing filter or to add new filters, contact the System Administrator in your organisation.



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.

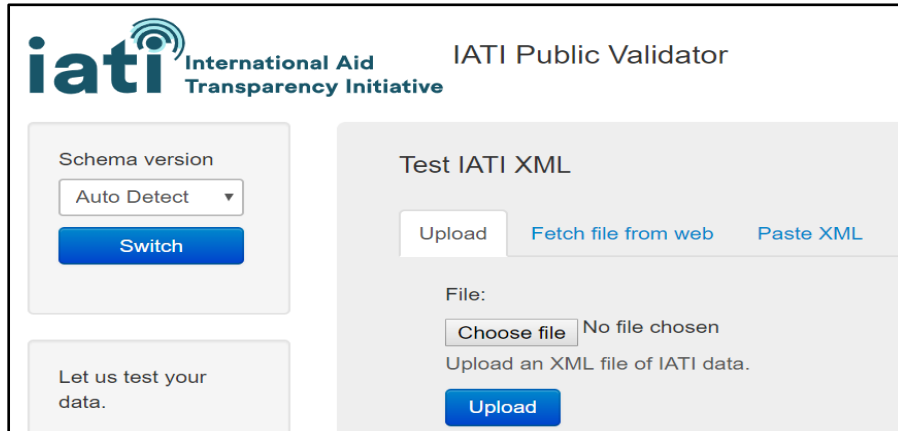
ⓘ NOTE: After the XML has been downloaded, choose a compatible platform to open the file i.e. Safari, Internet Explorer, Google Chrome etc

6. Validating the public link for IATI Activity Standard

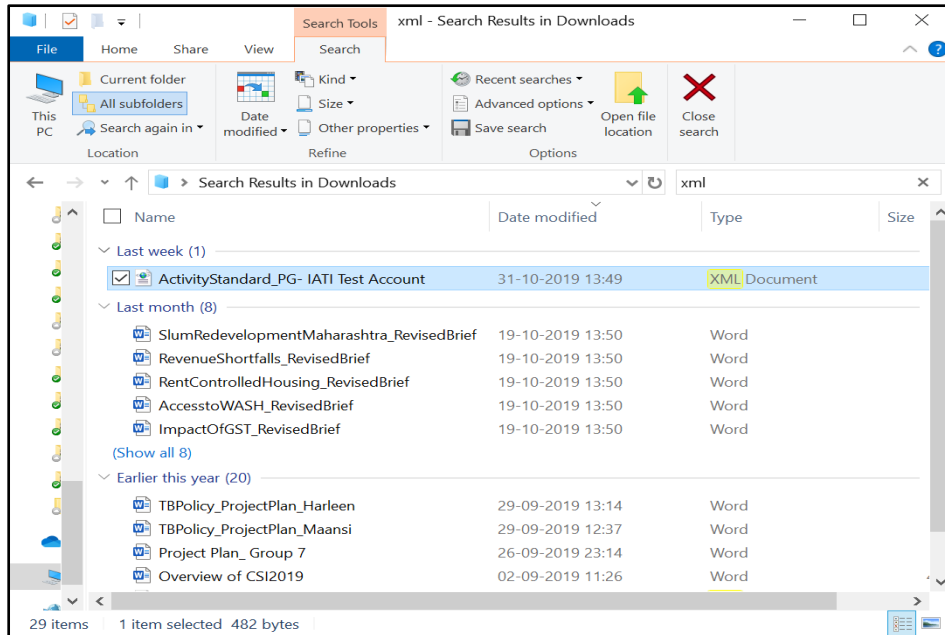
ⓘ NOTE: This method of validation can only be used after the XML has been downloaded. Due to a Salesforce limitation which prevents IATI from being able to read the content of the XML through the URL for public link, copying the public link into the “Fetch from web” tab of the IATI Public Validator tool 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](#)