

# 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\_\_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. 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. 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
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## 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.

#### 1) 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:

### New Budget

**Information**

**\* Name**

**\* Project**

**Description**

**Budget Status**

**Start date** ⓘ

**End date** ⓘ

**Exclude from IATI** ⓘ

**Budget Status**

**Exclude from IATI** ⓘ

**Expenditure Status**

**Locked** ⓘ

**Budget Identifier Vocabulary**

**IATI Value Date** ⓘ

**IATI Budget Status**

**IATI Type**

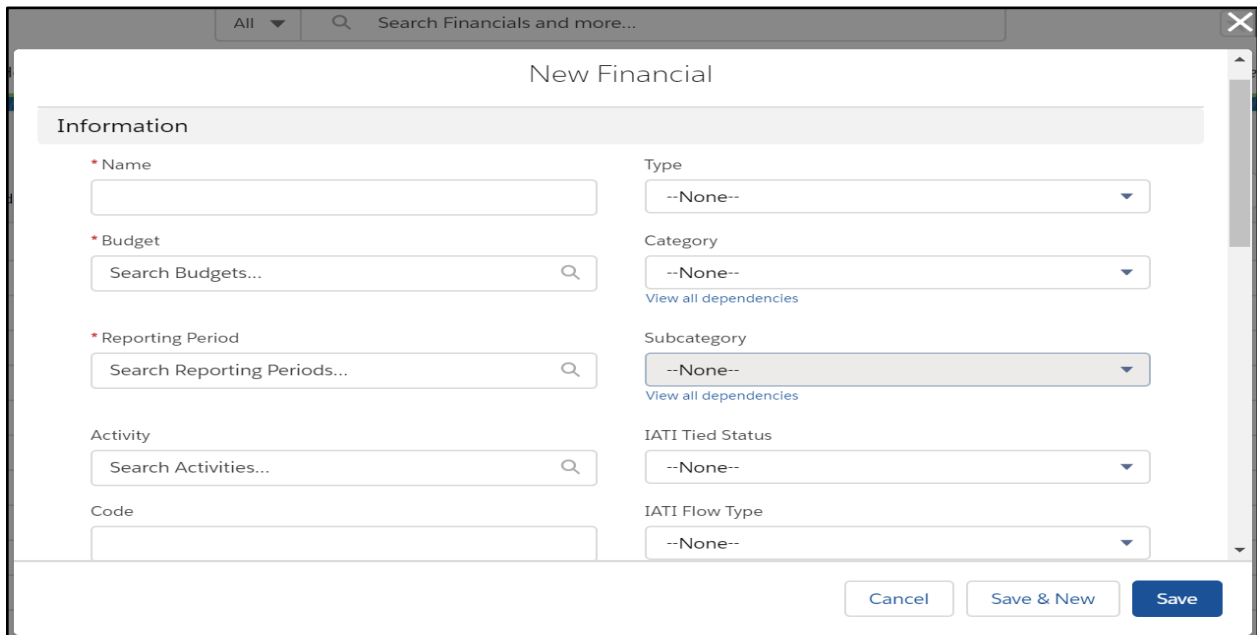
Amp fields on the Budget object, mapped with corresponding IATI vocabulary, that will print on IATI Organisation XML are depicted in the table below:

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

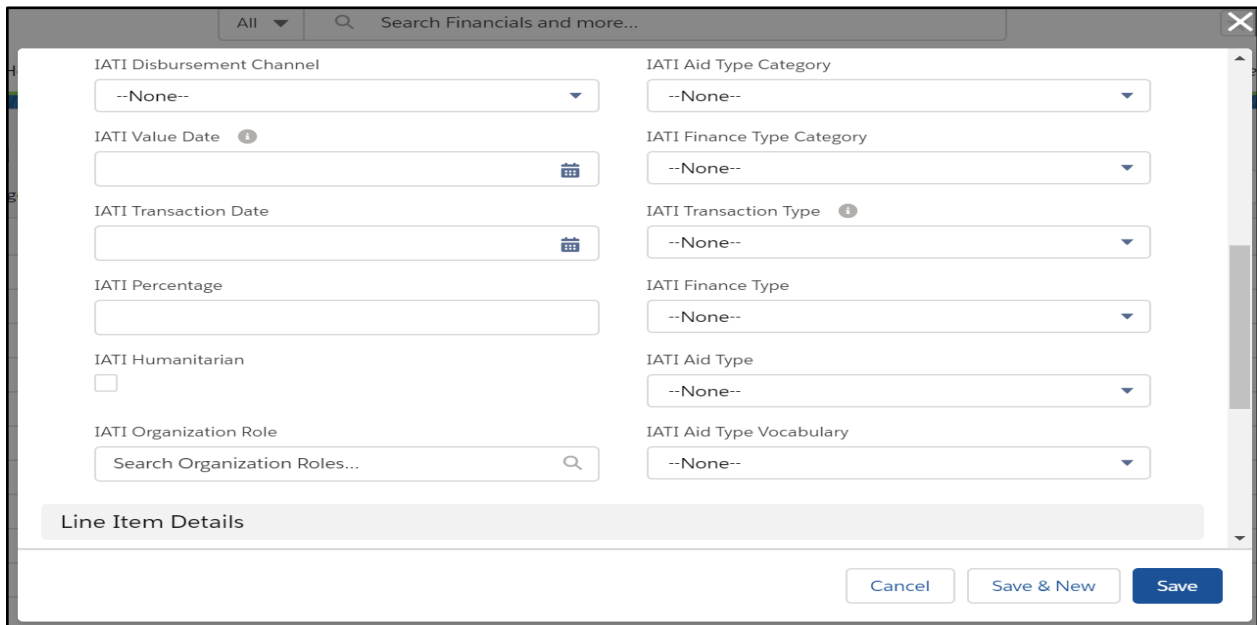
Refer to Amp Impact General User Guide to know more about how to create Financial Line Item records on Financials page. The IATI fields that display while creating a New Financial record are displayed in the images below:



The screenshot shows the 'New Financial' form with the following fields in the 'Information' section:

- Name: Text input field
- Budget: Search field with 'Search Budgets...' placeholder
- Reporting Period: Search field with 'Search Reporting Periods...' placeholder
- Activity: Search field with 'Search Activities...' placeholder
- Code: Text input field
- Type: Dropdown menu (value: --None--)
- Category: Dropdown menu (value: --None--), with a link 'View all dependencies' below it
- Subcategory: Dropdown menu (value: --None--), with a link 'View all dependencies' below it
- IATI Tied Status: Dropdown menu (value: --None--)
- IATI Flow Type: Dropdown menu (value: --None--)

Buttons at the bottom: Cancel, Save & New, Save.



The screenshot shows the 'Line Item Details' section of the 'New Financial' form with the following fields:

- IATI Disbursement Channel: Dropdown menu (value: --None--)
- IATI Value Date: Date picker field
- IATI Transaction Date: Date picker field
- IATI Percentage: Text input field
- IATI Humanitarian: Checkbox (unchecked)
- IATI Organization Role: Search field with 'Search Organization Roles...' placeholder
- IATI Aid Type Category: Dropdown menu (value: --None--)
- IATI Finance Type Category: Dropdown menu (value: --None--)
- IATI Transaction Type: Dropdown menu (value: --None--)
- IATI Finance Type: Dropdown menu (value: --None--)
- IATI Aid Type: Dropdown menu (value: --None--)
- IATI Aid Type Vocabulary: Dropdown menu (value: --None--)

Buttons at the bottom: Cancel, Save & New, Save.

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



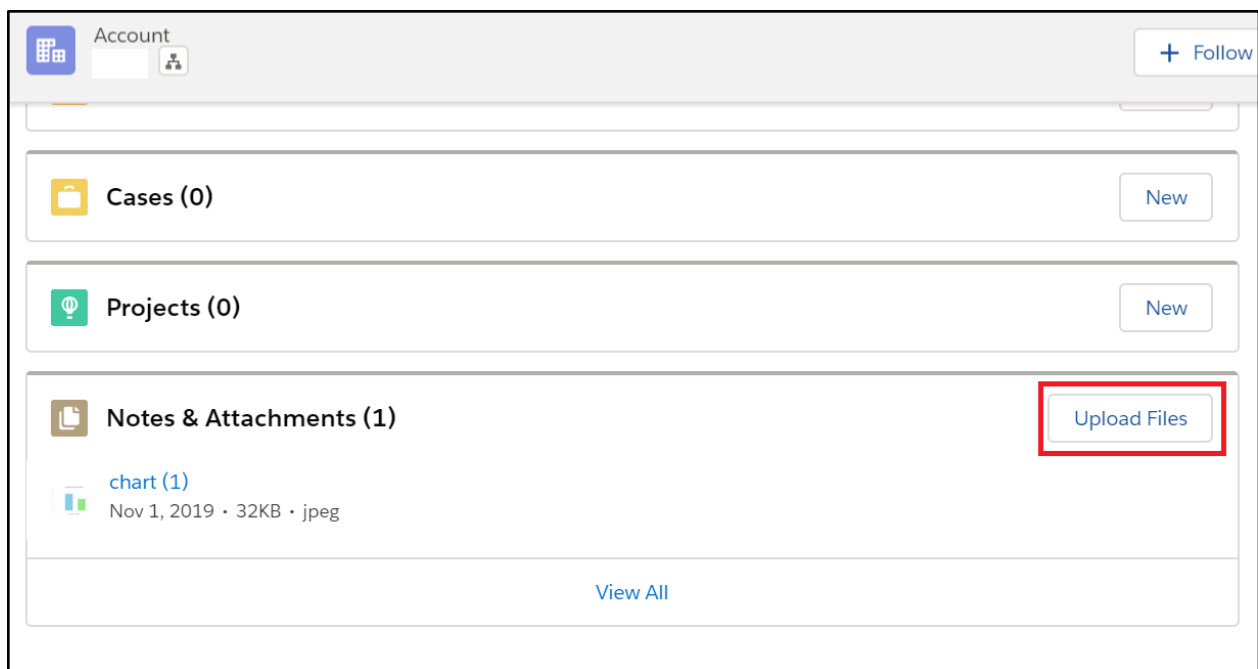
### III) Adding Attachments

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.

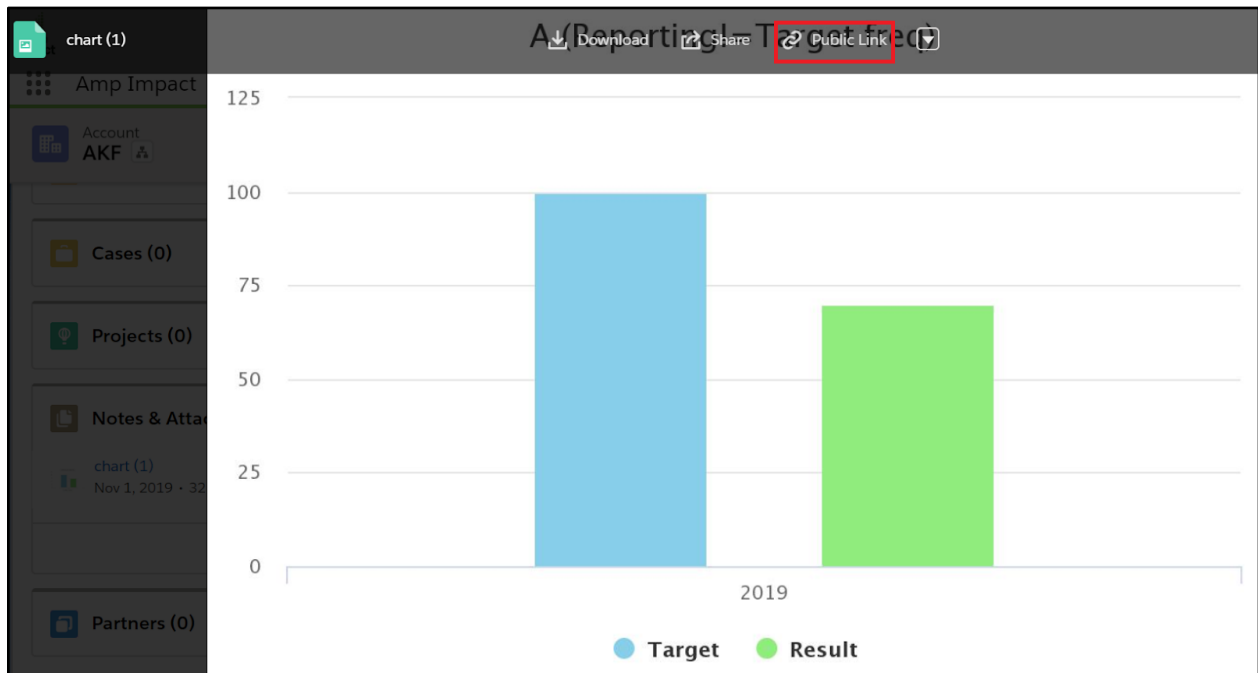
ⓘ **NOTE:** The field `ampi_include_in_iati_c` must be set to TRUE in order for the attachment to display in the XML. In addition, ensure that the URL for public link to the attachment is generated before the XML is generated.

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

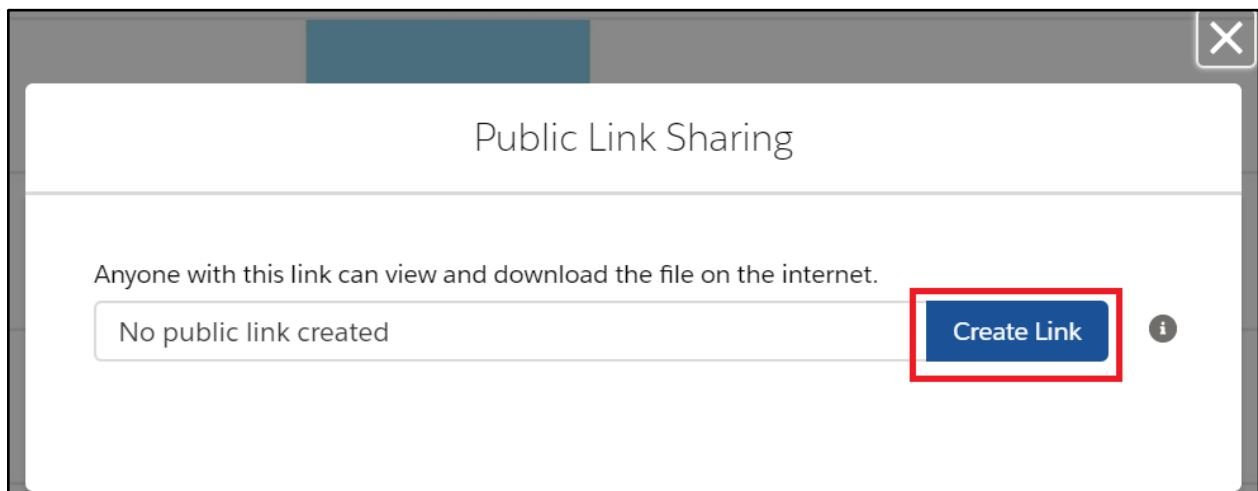
1. Navigate to the Accounts object. Open an Account record
2. In the Related list, scroll down to Notes and Attachments section
3. Click on Upload Files button (see screenshot below). Select the desired file to be attached



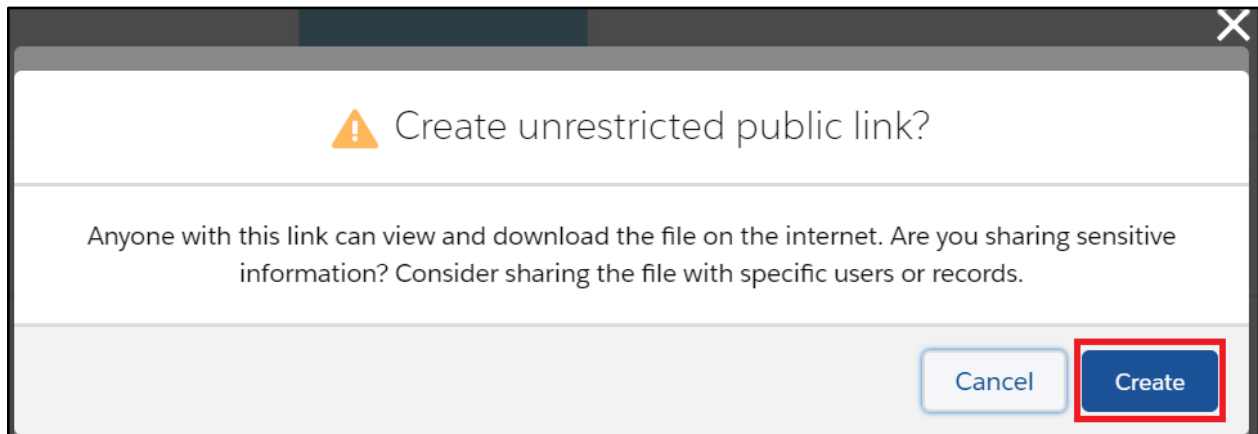
4. In order to see a preview of the attachment, click on the link to the attached document
5. Click on the Public Link button (see screenshot below)



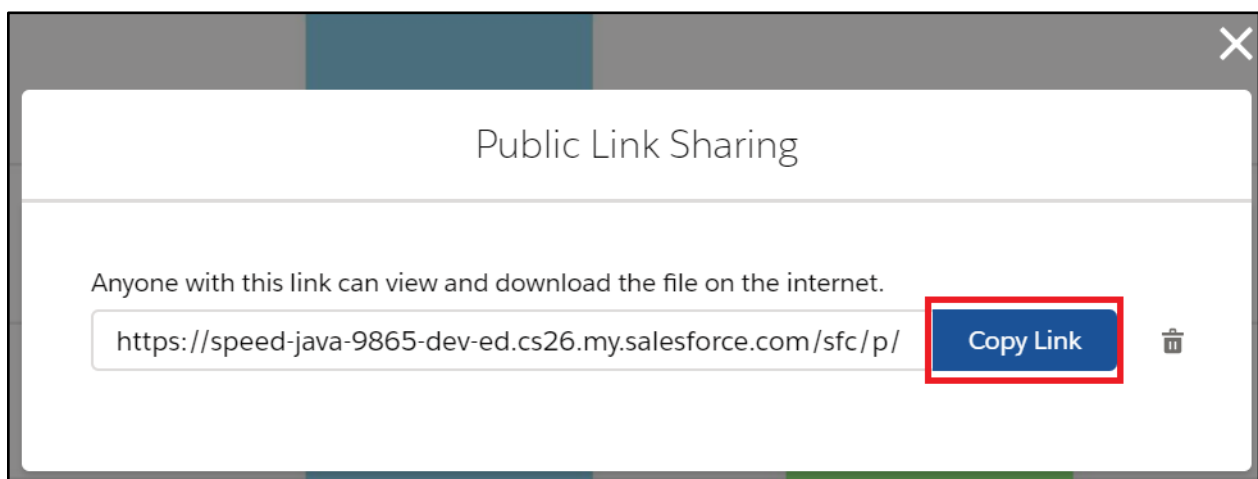
6. In the Public Link Sharing popup, click on the Create Link button (see screenshot below)



- 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.

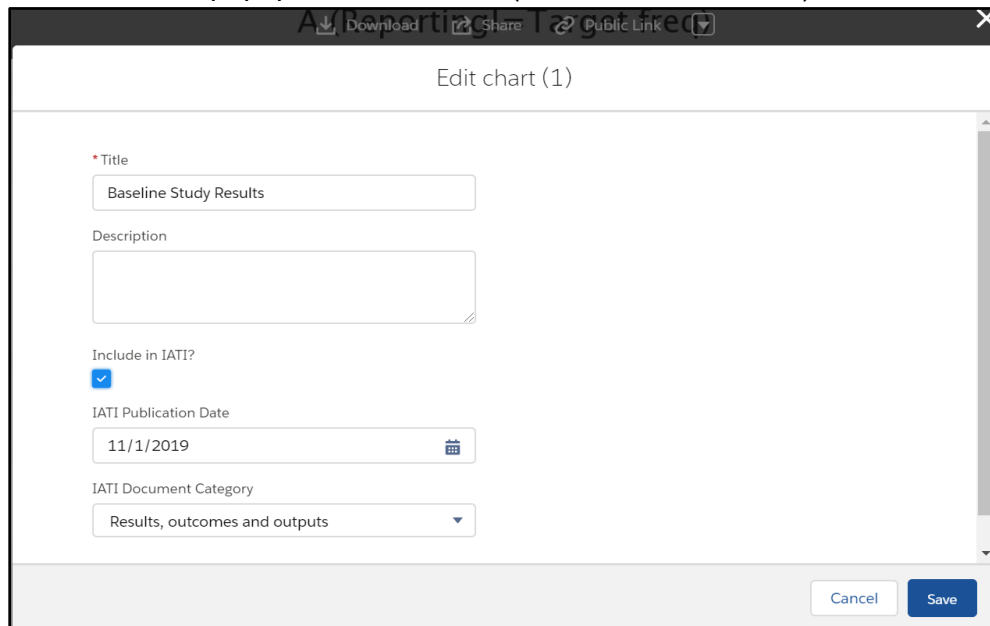
To publish the URL into an IATI Organisation XML, follow the steps below:

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).



**Edit chart (1)**

\* Title

Description

Include in IATI?

IATI Publication Date

IATI Document Category

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.

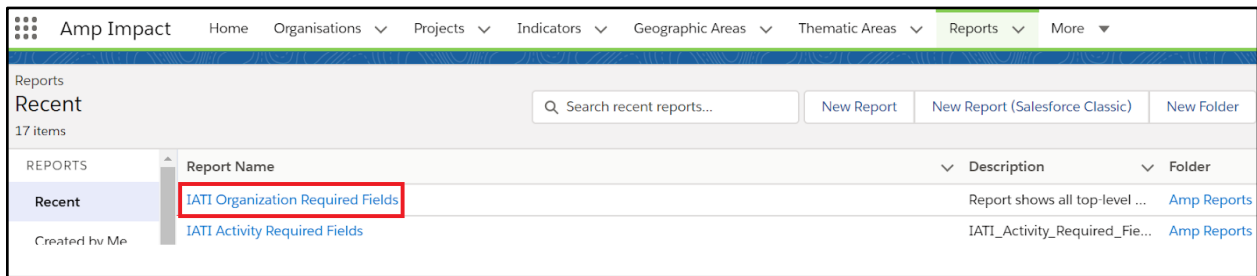
The report has only two fields (see below) because only these IATI fields are required to consider the Organisation Standard XML as complete. However, an organisation may choose to have more required fields to consider the Organisation Standard XML as complete. The user can modify the report accordingly.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

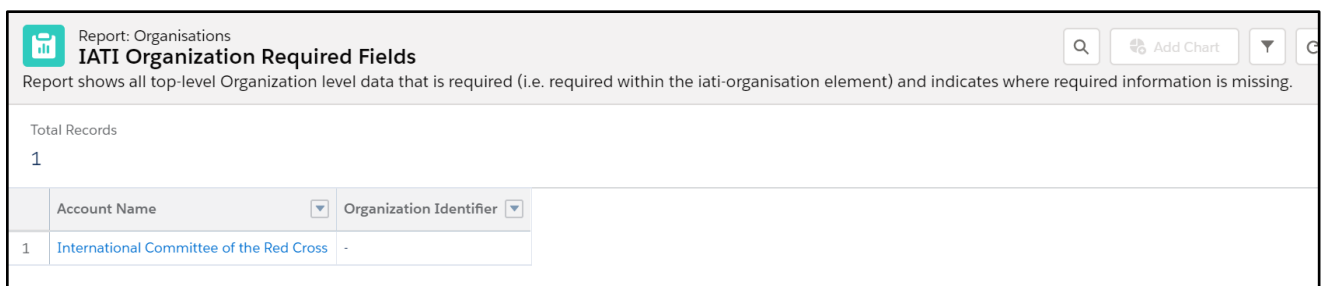
1. Organization Identifier field
2. Account Name field

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

1. Navigate to Reports object



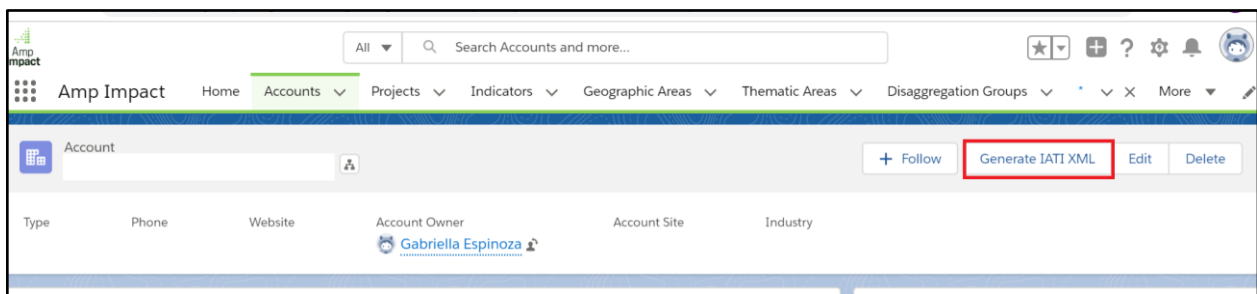
2. Click on the Report Name record called IATI Organization Required Fields



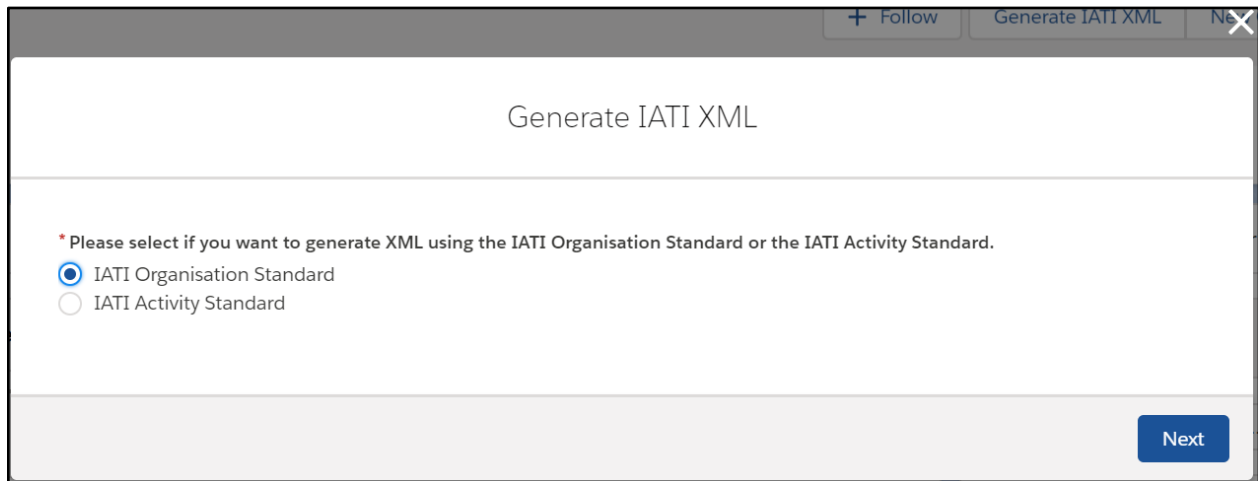
## Accessing the public link to download the XML

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



Generate IATI XML

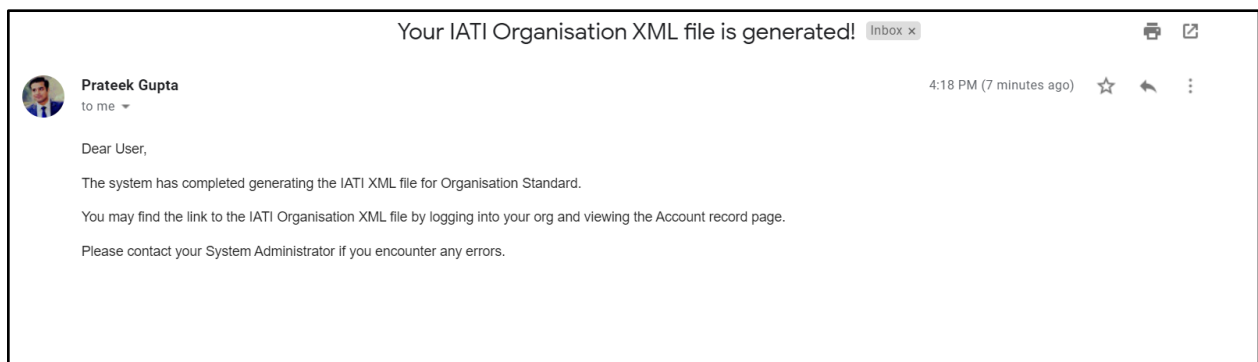
\* Please select if you want to generate XML using the IATI Organisation Standard or the IATI Activity Standard.

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

Account
+ Follow

---

IATI Details

Exclude from IATI <span style="float: right;">?</span> <input type="checkbox"/>	IATI Organization Type Code <span style="float: right;">?</span> 21
IATI Activity XML Link <a href="https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fuo/WY.Oi3cINTZ.AV2qxjAEdQQyaO4IW4PKxY6I6anRhmw">https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fuo/WY.Oi3cINTZ.AV2qxjAEdQQyaO4IW4PKxY6I6anRhmw</a>	IATI Organization XML Link <a href="https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fv8/AQ0viOqsZTHfKXdp3hCWIAI2_c tbL1b9K3jCH.g42O0">https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fv8/AQ0viOqsZTHfKXdp3hCWIAI2_c tbL1b9K3jCH.g42O0</a>
IATI Organization Type <span style="float: right;">?</span> International NGO	IATI Secondary Reporter? <input type="checkbox"/>
Organization Identifier <span style="float: right;">?</span> 21109	Shipping Address
Billing Address	Shipping Address
Created By <a href="#">Prateek Gupta</a> , 10/25/2019, 1:51 AM	Last Modified By <a href="#">Prateek Gupta</a> , 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.

**Admin Note:**

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

### Validating IATI Organisation Standard

**Admin 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 Validator](#) tool.
2. Click *Check Data*.



## IATI Validator

The IATI Validator is an online tool for checking if data aligns with the rules and guidance of IATI Standard. It allows users to check and improve the quality of IATI data to ensure it is accessible and useful to anyone working with data on development and humanitarian resources and results.

For more information, see [IATI Validator Q&A](#).

### Check data

Check your IATI data

- Select and upload your IATI files OR add URL to files
- Get validation results

[CHECK DATA](#)

### Public data viewer

Check all files published on the IATI Registry

- Find an organisation
- See the IATI files published by the organisation
- Get validation results of an IATI file

[PUBLIC DATA VIEWER](#)

3. Follow the steps to attach or link to the IATI XML file.

## IATI Validator

### Check data

Upload your IATI file and receive validation feedback.

Step 1: Select your IATI files. You can select multiple files at the same time.

[BROWSE](#)

OR

Step 1: Add a web address (URL) of your IATI XMLfile. You can add multiple files by separating them with |

Step 2: Upload your IATI files

[UPLOAD](#)

Step 2: Fetch the files from the web

[FETCH](#)

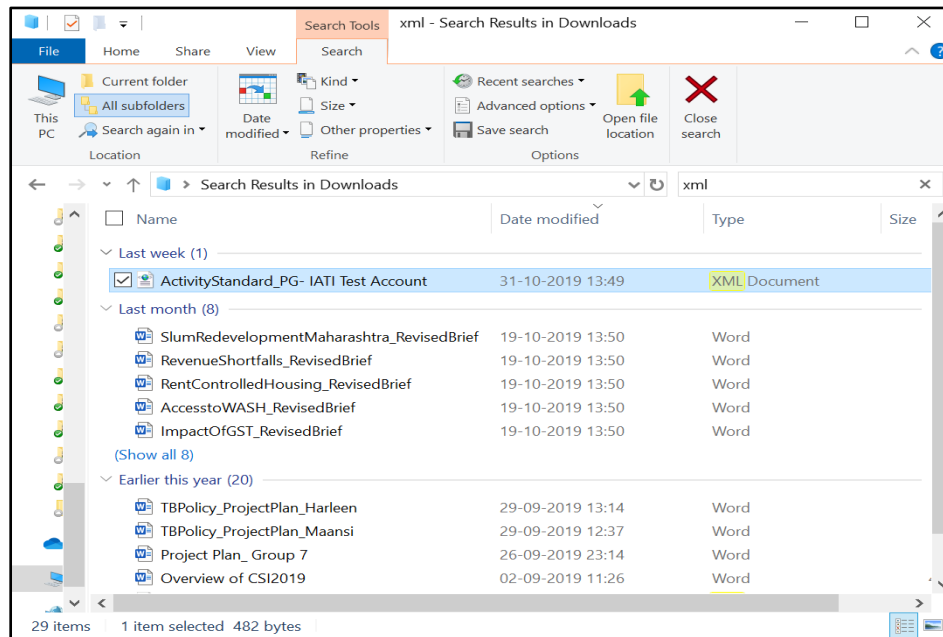
Step 3: Start validating your files

[VALIDATE](#)

Step 3: Start validating your files

[VALIDATE](#)

4. Select the downloaded copy of IATI Activity XML.



5. In Step 2, Click on *Upload* or *Fetch*. button on the website.
6. In Step 3, click *Validate*.

If the XML file uploads successfully, then the URL for the 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

Organization Role object enables tracking the role an organization played in a particular Amp Impact project. For example, an organization's role is to be a donor if it provides funding to a project. Four fields on Organization Role object are used for this purpose:

1. Organization Role Name - Text field tracking the name provided to the organization's role
2. Role - Picklist field tracking the role that an organization played in an activity
3. Project - Master-detail field to the project which is receiving the funds
4. Organization - Master-detail field to the organization which is providing/receiving the funds

## 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:

<b>Theme of data to be entered</b>	<b>Point of entry within Amp Impact</b>
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

### 3A. Transactions

Allocation object enables tracking monetary amounts allocated to an Amp Impact project by an account or organization for a humanitarian aid activity. There are two types of IATI transactions which are tracked through Allocation object:

1. **Outgoing Commitment** - A firm, written obligation from a donor or provider to provide a specified amount of funds, under particular terms and conditions, for specific purposes, for the benefit of the recipient.
2. **Incoming Commitment** - A firm, written obligation from a donor or provider to provide a specified amount of funds, under particular terms and conditions, reported by a recipient for this activity.

Financial object enables tracking information about the financial line items unique to a combination of reporting period, budget and organization role in Amp Impact. There are two types of IATI transactions which are tracked through Disbursement object:

1. **Disbursement** - Outgoing funds that are placed at the disposal of a recipient government or organisation, or funds transferred between two separately reported activities.
2. **Expenditure** - Outgoing funds that are spent on goods and services for the activity.

Disbursement object enables tracking the IATI transactions which are classified as 'Incoming Funds'. Incoming Funds are the actual monetary aid amount received for use on the activity, which can be from an external or internal source.

## 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

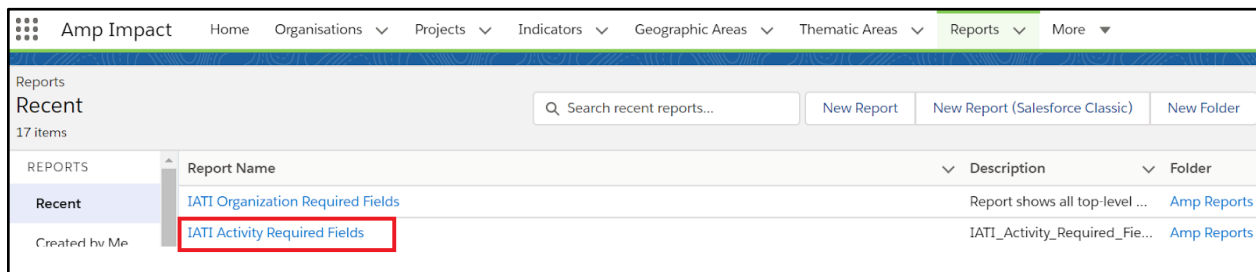
14	ContentVersion	IATI Publication Date
15	Reporting Period	Reporting Period Start Date
16	IATI Policy	Policy Marker Code
17	Disbursement	IATI Value Date
18	Financial	IATI Code
19	Financial	Description
20	Financial, Disbursement, Allocation	IATI Transaction Date
21	Financial, Disbursement, Allocation	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:

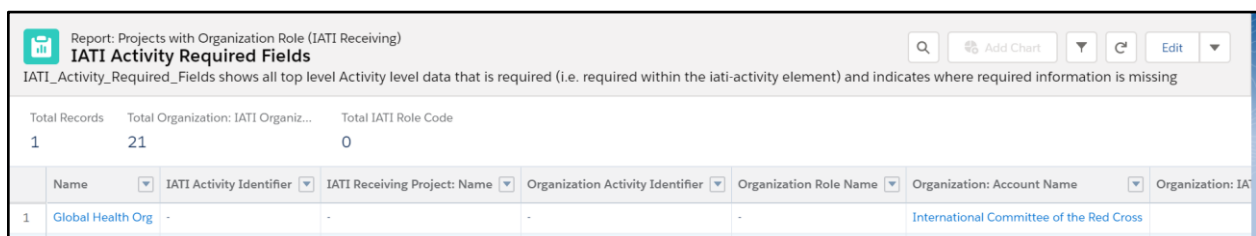
1. Navigate to Reports object



The screenshot shows the Amp Impact interface with the 'Reports' menu open. A table lists recent reports:

REPORTS	Report Name	Description	Folder
Recent	IATI Organization Required Fields	Report shows all top-level ...	Amp Reports
Created by Me	<b>IATI Activity Required Fields</b>	IATI_Activity_Required_Fie...	Amp Reports

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



The screenshot shows the report view for 'IATI Activity Required Fields'. It includes a summary table and a data table.

Total Records	Total Organization: IATI Organiz...	Total IATI Role Code
1	21	0

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	

**Admin Note:**

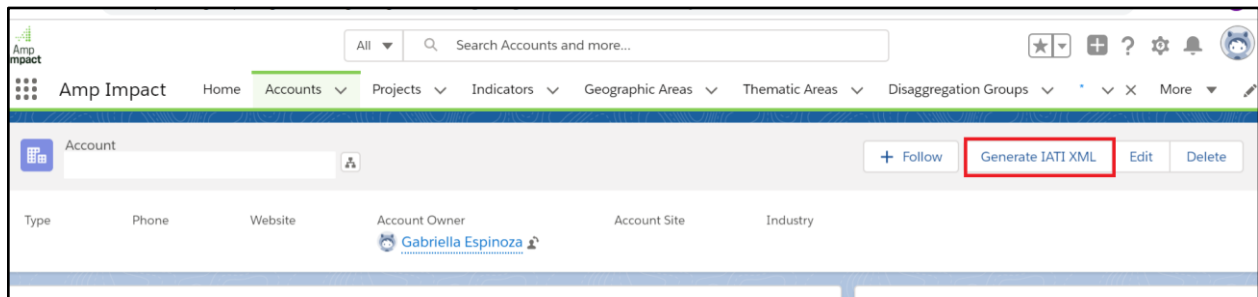
If a user includes qualitative and milestone indicators in a project, their target and actual values from SetTargets and AddResults pages are not printed in IATI Activity XML.

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

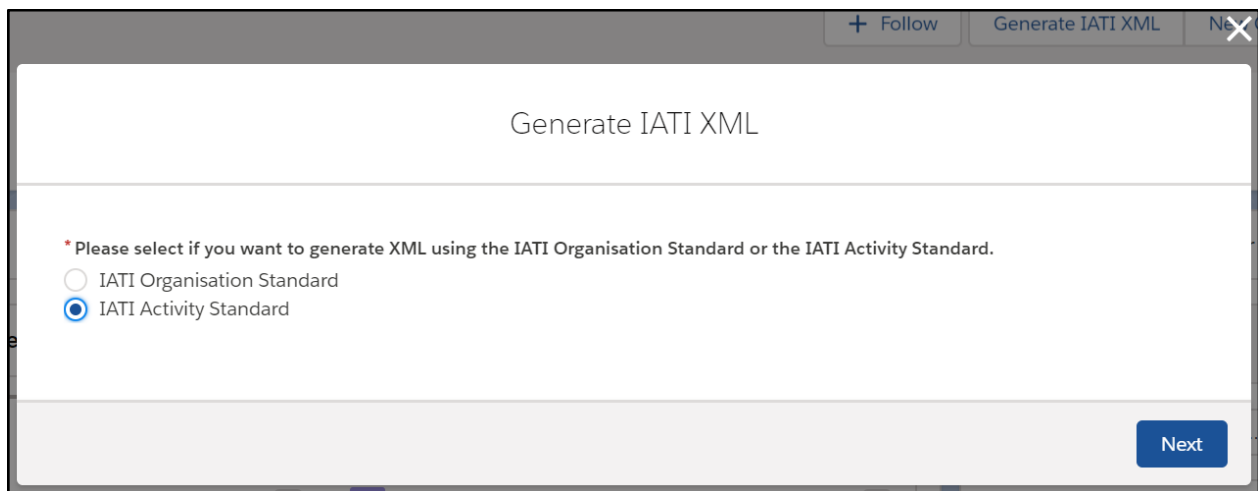
Once the user has reviewed IATI data for publishing, follow the steps below to generate the IATI Activity XML:

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





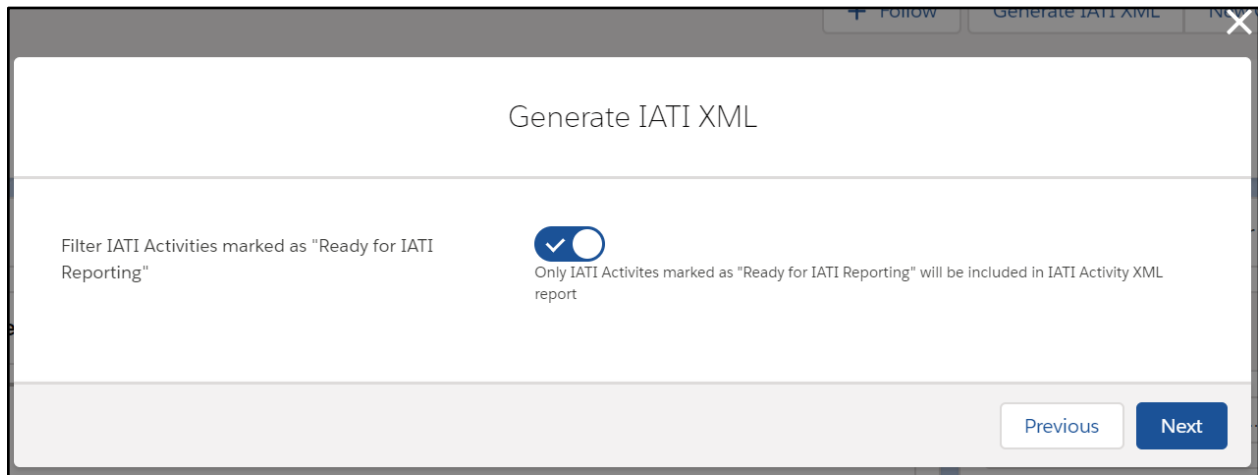
2. Select the IATI Activity Standard in the popup



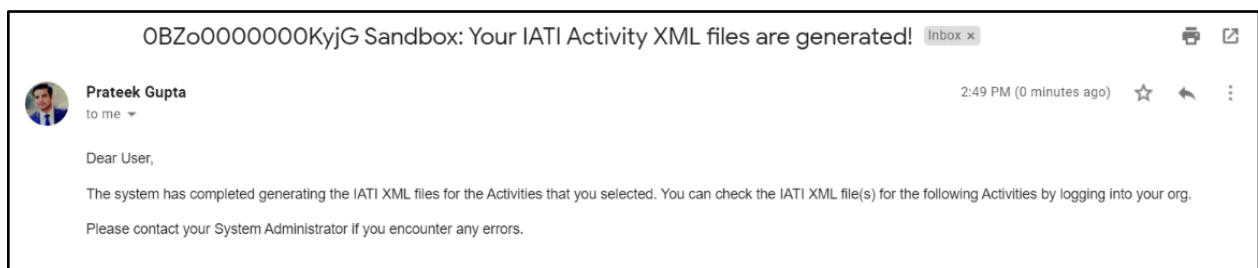
3. Toggle the slider button labelled as Ready for IATI Reporting to display a list of IATI Activities/Project records that are ready for IATI publishing

**Admin 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

Account
+ Follow

---

IATI Details

Exclude from IATI <span style="float: right;">?</span> <input type="checkbox"/>	IATI Organization Type Code <span style="float: right;">?</span> 21
IATI Activity XML Link <span style="float: right;">?</span> <a href="https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fuo/WY.Oi3cINTZ.AV2qxjAEdQQyaO4IW4PKxY6I6anRhmw">https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fuo/WY.Oi3cINTZ.AV2qxjAEdQQyaO4IW4PKxY6I6anRhmw</a>	IATI Organization XML Link <span style="float: right;">?</span> <a href="https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fv8/AQ0viOqsZTHfKXdP3hCWIAI2_c tBL1b9K3jCH.g4200">https://speed-java-9865-dev-ed.cs26.my.salesforce.com/sfc/p/210000001Z1E/a/210000004Fv8/AQ0viOqsZTHfKXdP3hCWIAI2_c tBL1b9K3jCH.g4200</a>
IATI Organization Type <span style="float: right;">?</span> International NGO	IATI Secondary Reporter? <span style="float: right;">?</span> <input type="checkbox"/>
Organization Identifier <span style="float: right;">?</span> 21109	Shipping Address <span style="float: right;">?</span>
Billing Address <span style="float: right;">?</span>	Last Modified By <span style="float: right;">?</span> Prateek Gupta, 11/1/2019, 2:26 AM
Created By <span style="float: right;">?</span> Prateek Gupta, 10/25/2019, 1:51 AM	

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

**Admin 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 IATI Activity Standard

**Admin 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 Validator](#) tool.
2. Click *Check Data*.

## IATI Validator

The IATI Validator is an online tool for checking if data aligns with the rules and guidance of IATI Standard. It allows users to check and improve the quality of IATI data to ensure it is accessible and useful to anyone working with data on development and humanitarian resources and results.

For more information, see [IATI Validator Q&A](#).

### Check data

Check your IATI data

- Select and upload your IATI files OR add URL to files
- Get validation results

[CHECK DATA](#)

### Public data viewer

Check all files published on the IATI Registry

- Find an organisation
- See the IATI files published by the organisation
- Get validation results of an IATI file

[PUBLIC DATA VIEWER](#)

3. Follow the steps to attach or link to the IATI XML file.

## IATI Validator

### Check data

Upload your IATI file and receive validation feedback.

OR

Step 1: Select your IATI files. You can select multiple files at the same time.

[BROWSE](#)

Step 2: Upload your IATI files

[UPLOAD](#)

Step 3: Start validating your files

[VALIDATE](#)

Step 1: Add a web address (URL) of your IATI XMLfile. You can add multiple files by separating them with |

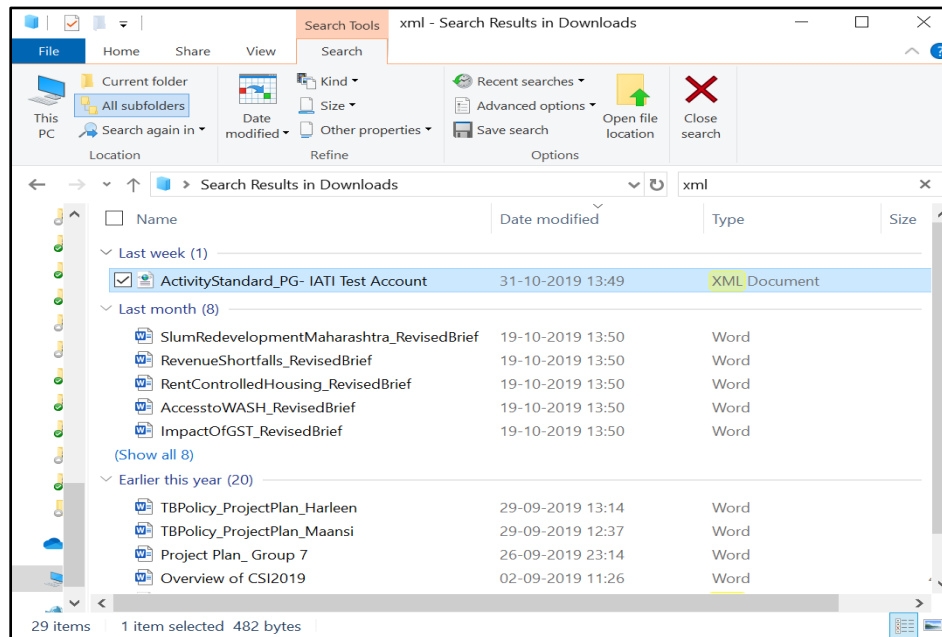
Step 2: Fetch the files from the web

[FETCH](#)

Step 3: Start validating your files

[VALIDATE](#)

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



5. In Step 2, Click on *Upload or Fetch*.
6. In Step 3, click *Validate*.

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](#)