

IATI Export

Last Modified on 07/05/2018 10:03 am EDT

All of the world's major donors have agreed to publish their data in the [International Aid Transparency Initiative](#) (IATI) format, and in turn many of them require grantees and recipients to report back to them in IATI format. DevResults supports one-click exporting of data in the IATI format. The XML file that's generated can be published to the IATI Repository, used for reporting to funders, or shared with other organizations.

To get set up with IATI exports, your site administrator will need to:

- [Edit Program Settings to define your IATI organization](#) information
- [Link your existing Status Options to a relevant IATI status](#)
- [Link your existing Partner Types to relevant IATI Organization roles](#)
- [Review configuration of activities and geographies](#) to ensure they have all required IATI fields completed

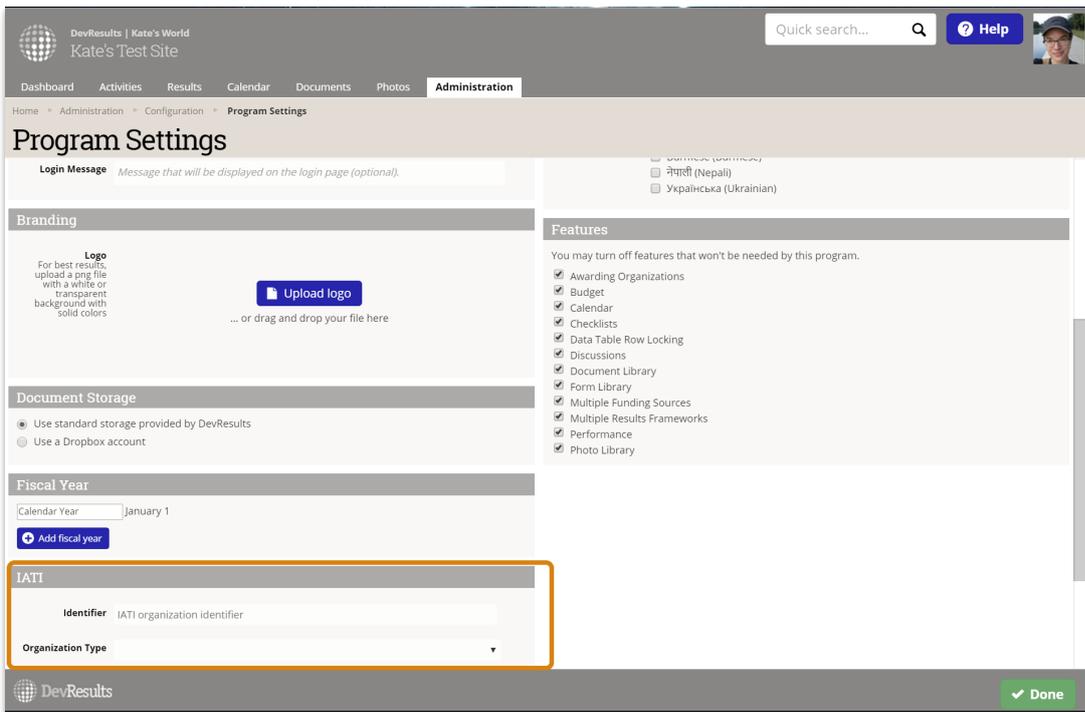
Once those steps are complete, you can [generate an export from any Activity Reporting Period](#) or for [multiple activities in a reporting period](#).

Configuring your Site for IATI Exports

Program Settings Organization Configuration

Before completing these steps, be sure you have an [IATI Organisation Identifier](#). This is a combination of the namespace code and the base identifier issued by the registry. If you're unsure of your IATI organisation identifier, check with the registry.

Someone with **View and Edit** permissions on **Program Settings** will need to make the initial configuration choices for your site's IATI exports. To do so, go to **Administration > Program Settings**. On the Program Settings page, complete the **IATI** section:

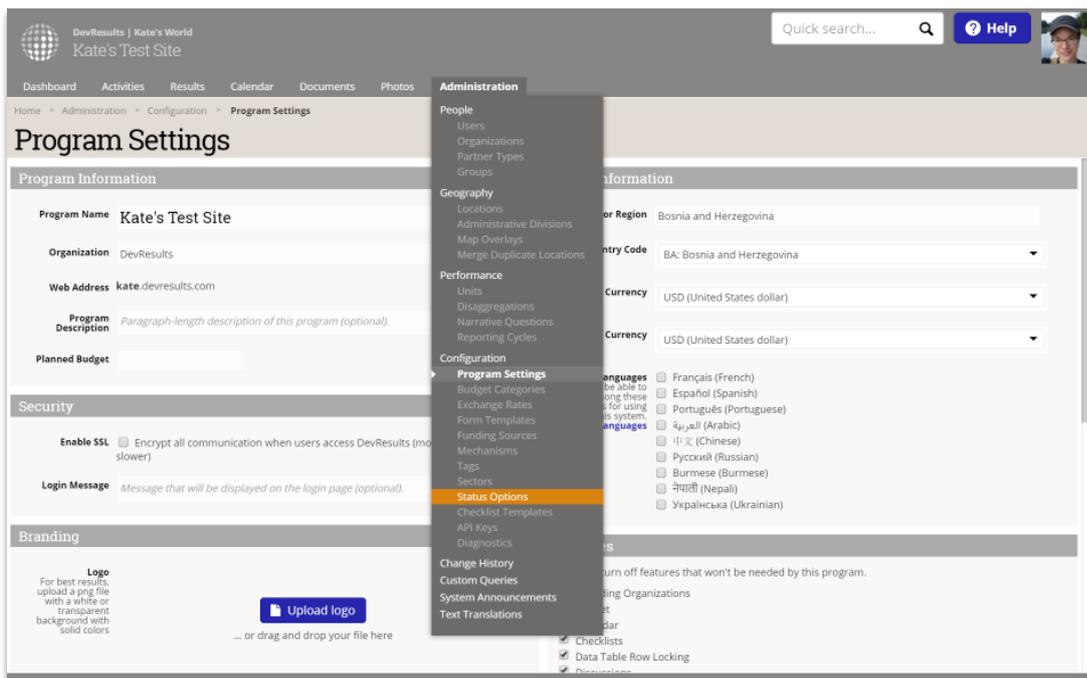


The **Identifier** is the Organization identifier provided by you by IATI.

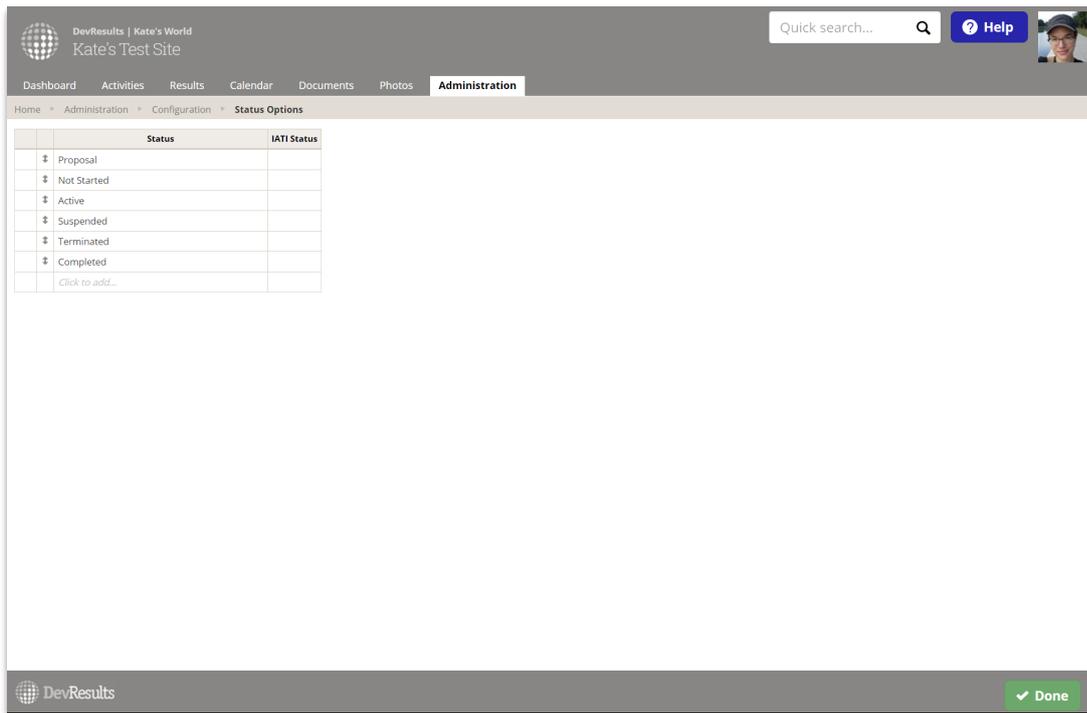
The **Organization Type** is the **IATI Organisation Type** that best matches your organization.

Link Status Options to Appropriate IATI Status

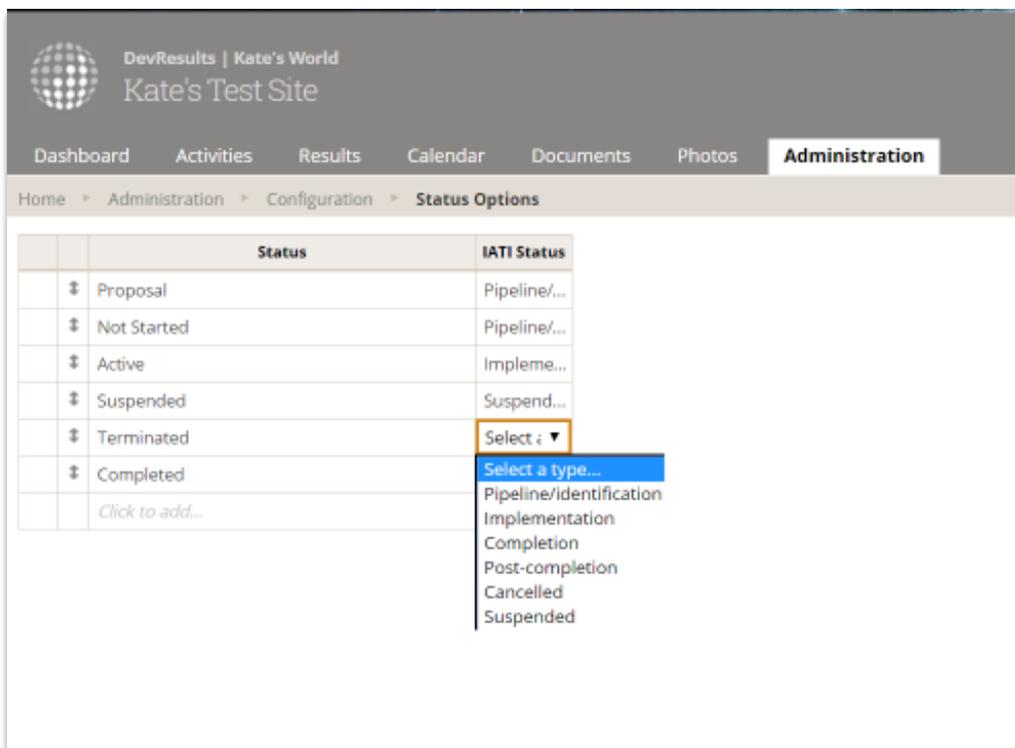
Each Activity Status Option in your DevResults site must have a relevant IATI status defined for it. To make this change, go to **Administration > Status Options**.



The Status Options screen shows all the defined Statuses for your site's Activities.



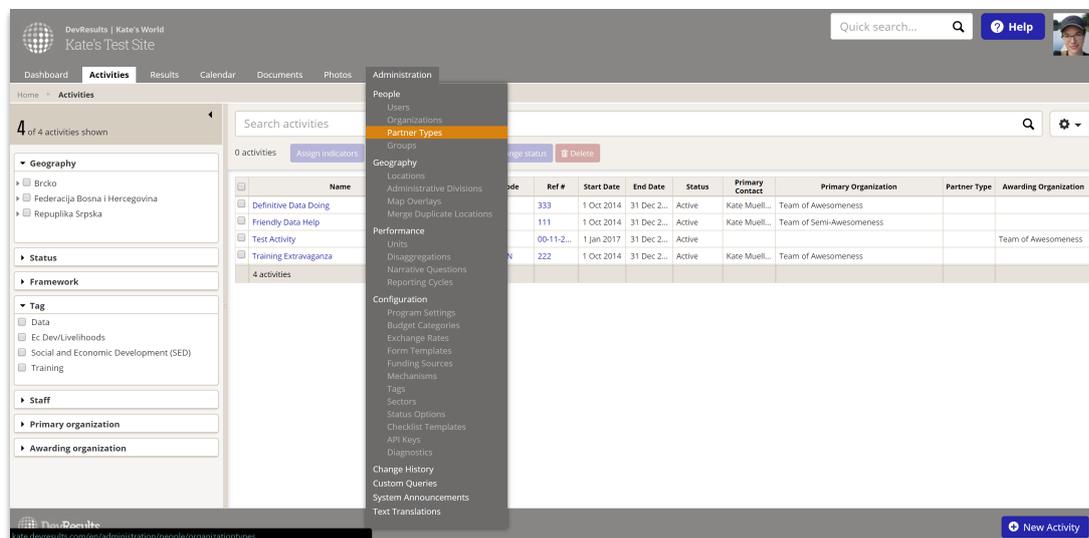
On the Status Options screen, use the dropdown in the IATI Status column to designate the appropriate IATI Status for each of your Activity Status Options. Review [IATI's Status Descriptions](#) for further guidance.



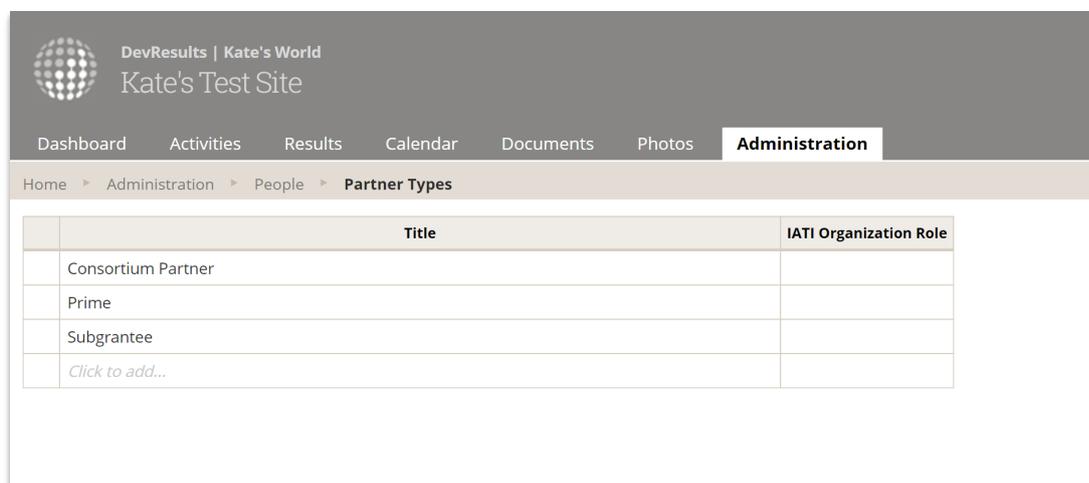
Link Partner Types to Appropriate IATI

Organization Roles

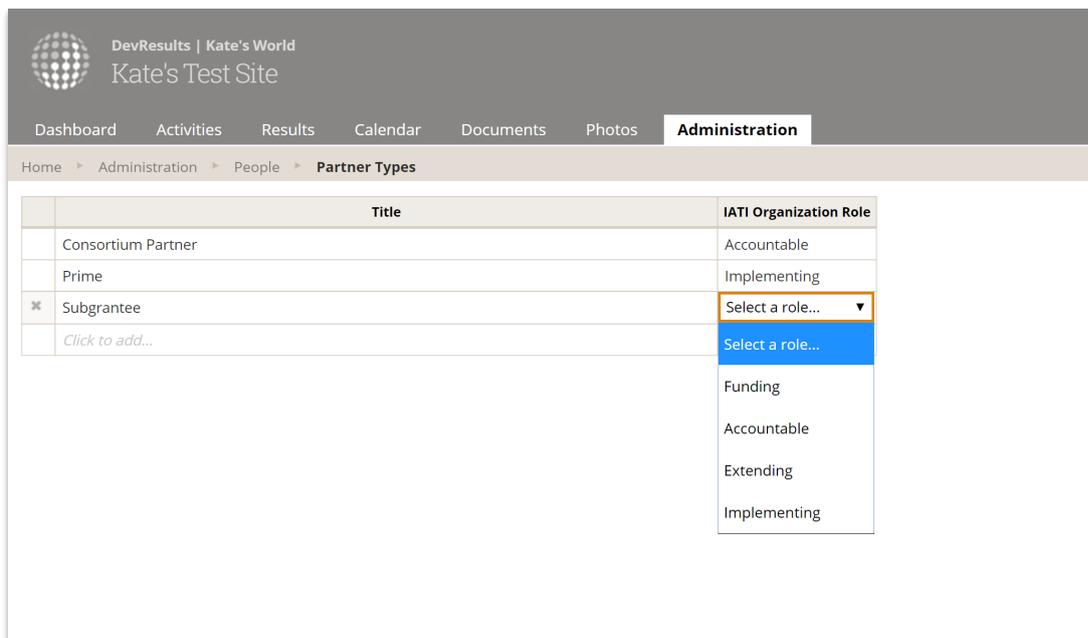
Each Partner Type in your DevResults site must have a relevant IATI [organization role](#) defined for it. To make this change, go to **Administration > Partner Types**.



The Partner Types screen shows all defined partner types for your site. These describe the potential relationships you have with the organizations working on your activities.



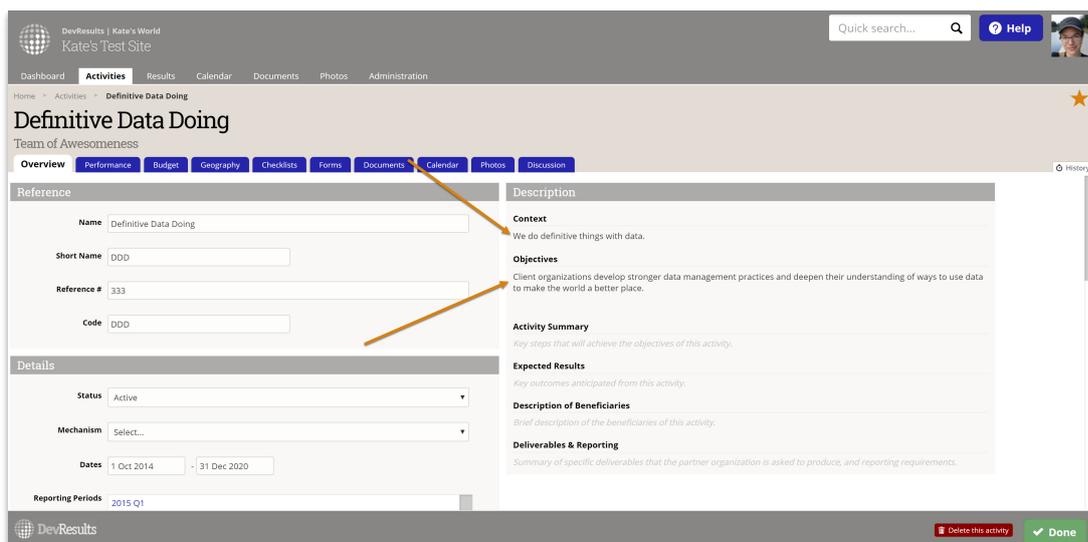
Use the dropdown in the IATI Organization Role column to designate the appropriate IATI Organization Role for each of your Partner Types. Review [IATI's Organization Role Descriptions](#) for further guidance.



Review Activity and Geography Fields

In addition to configuring the site overall, the IATI standard requires some fields which DevResults considers optional. For the IATI exports to generate properly, you'll need to make sure these fields are populated:

Activity Context or **Activity Objectives** (Activity Overview tab): IATI **requires** either a "General" Activity Description or "Objectives" in the Activity Description. The DevResults export will populate Activity Context into the General type and Activity Objectives into the Objectives type of the IATI Activity Description.



Activity Status (Activity Overview tab): IATI requires Activities to have an **Activity Status**. Once you've defined the relationship between your Status Options and their IATI Activity Status, verify that the activities you wish to export to IATI have a Status selected.

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Kate's Test Site

Dashboard **Activities** Results Calendar Documents Photos Administration

Home > Activities > Definitive Data Doing

Definitive Data Doing

Team of Awesomeness

Overview Performance Budget Geography Checklists Forms Documents Calendar Photos Discussion

Reference

Name: Definitive Data Doing

Short Name: DDD

Reference #: 333

Code: DDD

Details

Status: Active

Mechanism: Select...

Dates: 1 Oct 2014 - 31 Dec 2020

Reporting Periods: 2015 Q1

Description

Context
We do definitive things with data.

Objectives
Objectives of this activity.

Activity Summary
Key steps that will achieve the objectives of this activity.

Expected Results
Key outcomes anticipated from this activity.

Description of Beneficiaries
Brief description of the beneficiaries of this activity.

Deliverables & Reporting
Summary of specific deliverables that the partner org...

Activity Partner Organization - Partner Type (Activity Overview tab): IATI requires that partner organizations have a designated **Organization Role**. Once you've defined the relationship between your Partner Types and their IATI Organization Role, verify that the activities you wish to export in IATI have Partner Types assigned to the Partner Organizations.

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Kate's Test Site

Dashboard **Activities** Results Calendar Documents Photos Administration

Home > Activities > Definitive Data Doing

Definitive Data Doing

Team of Awesomeness

Overview Performance Budget Geography Checklists Forms Documents Calendar Photos Discussion

Tags: Data, Ec Dev/Livelihoods, Social and Economic Development (SED), Add a tag...

Partner Organization

Organization Info

Partner Organization	Partner Type	Primary Contact
Team of Awesomeness	Prime	Kate Mueller
Click to add...		

Note: In reports, all data for this activity will be attributed to the first (primary) organization listed here.

Manage Organizations Manage Partner Types Manage Users

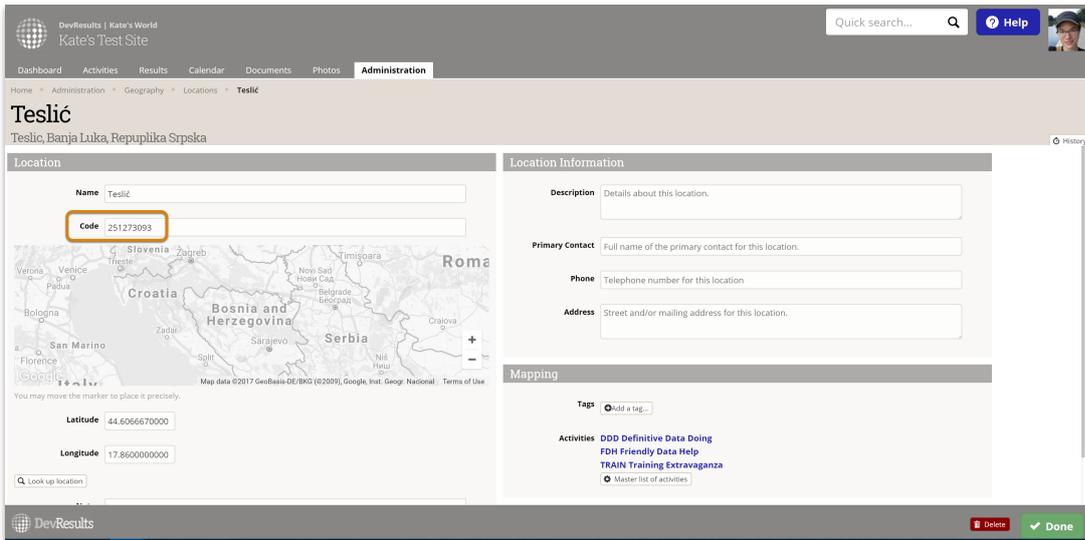
Awarding Organization

Select an organization...

Administrative Division Code (Administrative Division Details): The IATI standard requires that all geographies be identified with a **code called @ref** . For Administrative Divisions, we leverage the **Code** field on the Administrative Division details page. For countries, reference the **IATI CountryList** for the two-letter codes. For subnational boundaries, reference the geographic list and conventions that make the most sense for your site from here: <http://iatistandard.org/202/codelists/GeographicVocabulary/> (if we created your shapes for you, we used GADM shapes for subnational boundaries).

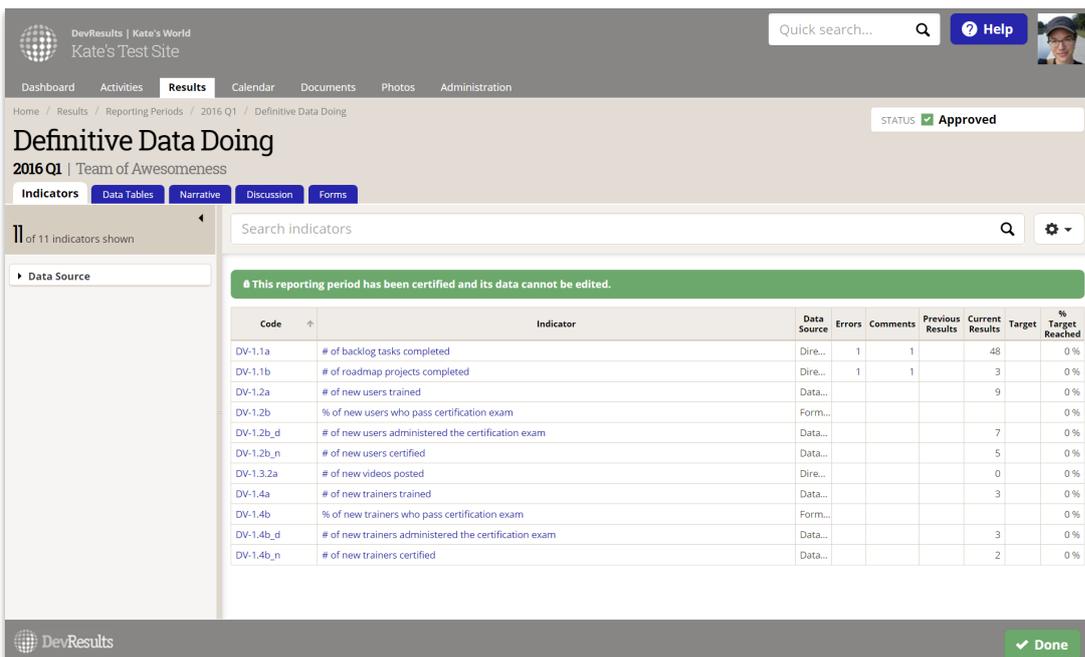
The screenshot shows the 'Administrative Division' details page for Bosnia and Herzegovina. The page is part of the 'DevResults | Kate's World' system, specifically the 'Administration' section. The breadcrumb trail is: Home > Administration > Geography > Administrative Divisions > Bosnia and Herzegovina. The main heading is 'Administrative Division'. Under the 'Hierarchy' section, the 'Name' field contains 'Bosnia and Herzegovina' and the 'Code' field contains 'BA', which is highlighted with an orange border. The 'Level' is set to 'Bosnia and Herzegovina'. Below this is a map of the region, showing Bosnia and Herzegovina highlighted in orange, with neighboring countries like Croatia, Serbia, Montenegro, and Italy visible. The map includes a zoom control and a 100 km scale bar. At the bottom, the 'Entities' section lists 'Brcko', 'Federacija Bosna i Hercegovina', and 'Republika Srpska'.

Location Code (Location Details): The IATI standard requires that all geographies be identified with a **code called @ref** . For Locations, we leverage the **Code** field on the Location details page:



How Do I Use It: Activity Reporting Period

Go to any Activity Reporting Period. Here, I'm in the 2016 Q1 Reporting Period for the Activity called Definitive Data Doing.



Click the gear cog in the upper right:

DevResults | Kate's World
Kate's Test Site

Dashboard Activities **Results** Calendar Documents Photos Administration

Home / Results / Reporting Periods / 2016 Q1 / Definitive Data Doing

STATUS ✔ Approved

Definitive Data Doing

2016 Q1 | Team of Awesomeness

Indicators Data Tables Narrative Discussion Forms

12 of 12 indicators shown

Search indicators

This reporting period has been certified and its data cannot be edited.

Code	Indicator	Data Source	Warnings	Comments	Previous Results	Current Results	Target	% Target Reached
DW-1.1a	# of backlog tasks completed	Dir...	1	1		48		0 %
DW-1.1b	# of roadmap projects completed	Dir...	1	1		3		0 %
DW-1.2a	# of new users trained	Dat...				9		0 %
DW-1.2b	% of new users who pass certification exam	For...				71 %		0 %
DW-1.2b_d	# of new users administered the certification exam	Dat...				7		0 %
DW-1.2b_n	# of new users certified	Dat...				5		0 %
DW-1.3.2a	# of new videos posted	Dir...				0		0 %
DW-1.4a	# of new trainers trained	Dat...				3		0 %
DW-1.4b	% of new trainers who pass certification exam	For...						0 %
DW-1.4b_d	# of new trainers administered the certification exam	Dat...				3		0 %
DW-1.4b_n	# of new trainers certified	Dat...				2		0 %
KM-01	# of training participants who attended Train the Trainers certification	Dat...						0 %

DevResults Done

In the menu that opens, click **Download IATI xml**:

DevResults | Kate's World
Kate's Test Site

Dashboard Activities **Results** Calendar Documents Photos Administration

Home / Results / Reporting Periods / 2016 Q1 / Definitive Data Doing

STATUS ✔ Approved

Definitive Data Doing

2016 Q1 | Team of Awesomeness

Indicators Data Tables Narrative Discussion Forms

12 of 12 indicators shown

Search indicators

This reporting period has been certified and its data cannot be edited.

Code	Indicator	Data Source	Warnings	Comments	Previous Results	Current Results	Target	% Target Reached
DW-1.1a	# of backlog tasks completed	Dir...						
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DW-1.2b_n	# of new users certified	Dat...						
DW-1.3.2a	# of new videos posted	Dir...						
DW-1.4a	# of new trainers trained	Dat...						
DW-1.4b	% of new trainers who pass certification exam	For...						
DW-1.4b_d	# of new trainers administered the certification exam	Dat...						
DW-1.4b_n	# of new trainers certified	Dat...					2	0 %
KM-01	# of training participants who attended Train the Trainers certification	Dat...						0 %

DevResults Done

This will run some quick validation to be sure you've completed all of the necessary steps. If you haven't, the pop-up will throw some warnings telling you what needs fixing. If you've properly configured everything, the pop-up will prompt you to download your XML:

Download IATI XML file

The activity configuration has been validated and the IATI document is ready for download.

Download XML

STATUS: ✔ Approved

Definitive Data Doing
2016 Q1 | Team of Awesomeness

Indicators | Data Tables | Narrative | Discussion | Forms

12 of 12 indicators shown

Search indicators

This reporting period has been certified and its data cannot be edited.

Code	Indicator	Data Source	Warnings	Comments	Previous Results	Current Results	Target	% Target Reached
DV-1.1a	# of backlog tasks completed	Dire...	1	1		48		0%
DV-1.1b	# of roadmap projects completed	Dire...	1	1		3		0%
DV-1.2a	# of new users trained	Dat...				9		0%
DV-1.2b	% of new users who pass certification exam	For...				71%		0%
DV-1.2b_d	# of new users administered the certification exam	Dat...				7		0%
DV-1.2b_n	# of new users certified	Dat...				5		0%
DV-1.3.2a	# of new videos posted	Dire...				0		0%
DV-1.4a	# of new trainers trained	Dat...				3		0%
DV-1.4b	% of new trainers who pass certification exam	For...						0%
DV-1.4b_d	# of new trainers administered the certification exam	Dat...				3		0%
DV-1.4b_n	# of new trainers certified	Dat...				2		0%
KM-01	# of training participants who attended Train the Trainers certification	Dat...						0%

Done

Now you can upload this file wherever you need to.

NOTE : Indicator results will not be included in the IATI download until the results are approved.

How Do I Use It: Multiple Activities, Single Reporting Period

Go to **Results > Reporting Periods**.

DevResults | Kate's World
Kate's Test Site

Quick search... [Help]

Dashboard | Activities | Results | Calendar | Documents | Photos | Administration

Overview
Results Framework
Indicators
Reporting Periods
Logic Checks
Data Tables

Activity Map

4 activities

You have no upcoming tasks.

My Bookmarked Activities

Definitive Data Doing
Friendly Data Help
Training Extravaganza

My Bookmarked Indicators

You don't have any bookmarked indicators.

of Activities by Tag

Add Widget

Click on the reporting period you want to export data from.

DevResults | Kate's World
Kate's Test Site

Quick search... [Help]

Dashboard Activities **Results** Calendar Documents Photos Administration

Home Results Reporting Periods

Search reporting periods

Name	Start Date	End Date	Submission Start Date	Submission End Date	% Complete	Reporting Cycle
2015 Q1	1 Jan 2015	30 Mar 2015	1 Apr 2015	30 Apr 2015	0%	Quarterly
2015 Q2	1 Apr 2015	30 Jun 2015	1 Jul 2015	31 Jul 2015	0%	Quarterly
2015 Q3	1 Jul 2015	30 Sep 2015	1 Oct 2015	31 Oct 2015	0%	Quarterly
2015 Q4	1 Oct 2015	31 Dec 2015	1 Jan 2016	31 Jan 2016	0%	Quarterly
2015 Year	1 Jan 2015	31 Dec 2015	1 Jan 2016	31 Jan 2016	0%	Annual
2016 Q1	1 Jan 2016	30 Mar 2016	1 Apr 2016	30 Apr 2016	100%	Quarterly
2016 Q2	1 Apr 2016	30 Jun 2016	1 Jul 2016	31 Jul 2016	0%	Quarterly
2016 Q3	1 Jul 2016	30 Sep 2016	1 Oct 2016	31 Oct 2016	0%	Quarterly
2016 Q4	1 Oct 2016	31 Dec 2016	1 Jan 2017	31 Jan 2017	0%	Quarterly
2016 Year	1 Jan 2016	31 Dec 2016	1 Jan 2017	31 Jan 2017	0%	Annual
2017 Q1	1 Jan 2017	31 Mar 2017	1 Apr 2017	30 Apr 2017	0%	Quarterly
2017 Q2	1 Apr 2017	30 Jun 2017	1 Jul 2017	31 Jul 2017	0%	Quarterly
2017 Q3	1 Jul 2017	30 Sep 2017	1 Oct 2017	31 Oct 2017	0%	Quarterly
2017 Q4	1 Oct 2017	31 Dec 2017	1 Jan 2018	31 Jan 2018	0%	Quarterly
2017 Year	1 Jan 2017	31 Dec 2017	1 Jan 2018	31 Jan 2018	0%	Annual
2018 Q1	1 Jan 2018	30 Mar 2018	1 Apr 2018	30 Apr 2018	0%	Quarterly
2018 Q2	1 Apr 2018	30 Jun 2018	1 Jul 2018	31 Jul 2018	0%	Quarterly

DevResults [New Reporting Period]

Click the **IATI Export** button.

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Kate's Test Site

Quick search... [Help]

Dashboard Activities **Results** Calendar Documents Photos Administration

Home Results Reporting Periods 2016 Q1

2016 Q1

Dates

Reporting Cycle: Quarterly [Edit reporting cycles]

Reporting Period Dates: 1 Jan 2016 - 30 Mar 2016

Submission Period Dates: 1 Apr 2016 - 30 Apr 2016

Certification: Certified [Learn more]

This reporting period was certified on 31 Mar 2017. You will need to undo certification to make changes to the reported data.

Site	Reporting Period	Status	Submission Period	Last Published	Publish Pending?
kworld	2016 Q1	Approved	Open		<input type="checkbox"/> Publish

Status by Activity

Export status by activity | Export all reporting period data | **IATI Export** | Assign previous activities

Code	Short Name	Activity	Awarding Org	Partner Org	Status	Locked?
DDD	DDD	Definitive Data Doing		Team of Awesome...	Approved	<input type="checkbox"/>
FDH	FDH	Friendly Data Help		Team of Semi-Awes...	Approved	<input type="checkbox"/>
TRAIN	TRAIN	Training Extravaganza		Team of Awesome...	Approved	<input type="checkbox"/>

DevResults [Delete this reporting period] [Done]

This will run some quick validation to be sure you've completed all of the necessary steps. If you haven't, the pop-up will throw some warnings telling you what needs fixing. If you've properly configured everything, the pop-up will prompt you to download your XML:

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Kate's Test Site

Quick search...

Dashboard Activities **Results** Calendar Documents Photos **IATI Download**

Home » Results » Reporting Periods » **2016 Q1**

2016 Q1

Dates

Reporting Cycle: Quarterly

Reporting Period Dates: 1 Jan 2016 - 30 Mar 2016

Submission Period Dates: 1 Apr 2016 - 30 Apr 2016

Certification: Certified

This reporting period was certified on 31 Mar 2017. You will need to undo certification to make changes to the reported data. [Learn more](#)

Linked Reporting Periods	Site	Reporting Period	Status	Submission Period	Last Published	Publish Pending?
	kworld	2016 Q1	Approved	Open		

Status by Activity

Code	Short Name	Activity	Awarding Org	Partner Org	Status	Locked?
DDD	DDD	Definitive Data Doing		Team of Awesome...	Approved	
FDH	FDH	Friendly Data Help		Team of Semi-Awes...	Approved	
TRAIN	TRAIN	Training Extravaganza		Team of Awesome...	Approved	

DevResults

Now you can upload this file wherever you need to.

Didn't answer your question? Please email us at help@devresults.com.

Related Articles
