

# IATI-AIMS import module

## User guide

v2, April 2017

Mark Brough and Matt Geddes

<b>1. Overview .....</b>	<b>2</b>
1.1 What this module does .....	2
1.2 The IATI import module does not replace the AIMS .....	2
1.3 Who this guide is for .....	2
<b>2. Preconditions and considerations .....</b>	<b>3</b>
2.1 Preconditions.....	3
2.2 Considerations.....	3
<b>3. Basic data import.....</b>	<b>5</b>
3.0 Donor Dashboard.....	5
3.1 Select project structure (optional).....	7
3.2 Filter for relevant projects .....	8
3.3 Implementing organisations .....	9
3.4 Review matched projects.....	10
3.5 Set import preferences .....	11
3.6 Final review and import .....	12
<b>4. Delegating projects (co-financed and trust fund projects) .....</b>	<b>14</b>
4.1 Map delegated activities to your own projects and trust funds .....	14
4.2 Select financial data .....	15
<b>5. Troubleshooting .....</b>	<b>16</b>
5.1 You are unable to log in .....	16
5.2 Your data looks strange in the import module .....	16
5.3 An unforeseen error occurs.....	16
<b>6. Process for quarterly reporting .....</b>	<b>17</b>

*For an introduction and overview of this work, please visit the accompanying microsite:  
<http://bd-iati.github.io>*

# **1. Overview**

## **1.1 What this module does**

IATI is a voluntary, multi-stakeholder initiative that seeks to improve the availability of aid information in order to increase aid effectiveness. Donors publish data on their aid activities, generally direct out of their project management systems. This data can then be imported into different systems, including the Bangladesh AIMS.

The IATI import module provides an interface through which donors can import data published by their own headquarters into the AIMS.

## **1.2 The IATI import module does not replace the AIMS**

The IATI import module is not a replacement for the AIMS itself. It should be seen more as an alternative way of getting data into the AIMS – one that should significantly reduce the burden of manual data entry. For most donors, it will not completely remove this burden – there will still be pieces of information that need to be manually provided. Under the AIMS Standard Operating Procedures, DPs are responsible for providing data on their development cooperation activities. This responsibility remains with donors, who still have to actively choose to import their data.

## **1.3 Who this guide is for**

This guide is for doors who want to import the IATI data their headquarters have published into the AIMS.

## 2. Preconditions and considerations

Before you can use the IATI import module to import your data into the AIMS, there are several preconditions that have to be met, and several other points that you should consider.

### 2.1 Preconditions

Before you can import IATI data to the AIMS, there are several preconditions that must be met:

1. **You must have a user account on the AIMS.** If you do not yet have one, contact ERD: [aimsbd.feedback@gmail.com](mailto:aimsbd.feedback@gmail.com)  
You will use the same login details for the IATI import module as you use for the rest of the AIMS.
2. **Your organisation must be publishing IATI data.** A very large number of organisations are now publishing to IATI. You can check if your organisation is publishing data for Bangladesh here. Note that some organisations may be publishing very old data (e.g. only for 2014). This data is too old to be used.  
<http://d-portal.org/ctrack.html?country=BD&tongue=eng#view=donors>

### 2.2 Considerations

Before beginning the process of importing your data to the AIMS, we recommend two steps:

1. **Take a look at your data on d-portal.org.** This provides a basic view of IATI data. If you follow the link above, you can then click on your organisation and see a list of active projects. The site isn't perfect, but it should let you see the sort of information that is being published at your headquarters level.
2. **Take a look at your data in the AIMS.** See what sort of data you are currently publishing.
  - a. Are you publishing projects or project subcomponents? You will have specific terms inside your organisation (e.g. programs / projects / components / contracts / awards), you just need to understand what "unit of aid" you are publishing.
  - b. You can speed up and simplify the process of importing your data to the AIMS by making sure you're providing the correct project codes in the AIMS. You can see the IATI Identifier used in IATI by going to D-Portal and then clicking on each project. You will see the project code towards the top of the page, under "IATI Identifier".
3. **Talk to your colleagues, especially those publishing IATI data.**
  - a. *Contact your colleagues working on your organisation's IATI publication at headquarters level.* They could be in the policy department responsible for aid effectiveness, or perhaps in the IT department. Let them know you want to start using your organisation's IATI data, and ask them if they think there would be any issues with you doing so.
  - b. *Contact relevant colleagues currently / previously in your country office.* Talk with those previously responsible for reporting data to the AIMS and ask them if there are any issues or peculiarities of the way your organisation operates that you should be aware of. You may also want to flag this to your senior colleagues and

communications staff, as it may be of wider interest that your country office is meeting commitments made at the international level.

You can also start the process of data import and play around – nothing gets imported until right at the end of the process. You can even trial import into the test server (though it appears certain donor IT systems block access to the test server).

### **3. Basic data import**

Visit the AIMS via the usual site:

<http://aims.erd.gov.bd>

- ⇒ **Click on “IATI Import Module” on the right hand side, under the login box.**
- ⇒ **Use your normal AIMS username and password to log in to the IATI import module.**

The screenshot shows the AIMS IATI Import login interface. The top navigation bar is green with the text "AIMS IATI Import". To the left is a light blue sidebar. On the right, there is a login form with a light blue background. It includes a "Login with your AIMS User id and Password" button, a "Username" input field with an error message "Username is required", a "Password" input field with an error message "Password is required", and a red "Login" button at the bottom.

#### **3.0 Donor Dashboard**

Once logged in, you will see the following screen, which allows you to manage the import for your organisation. You can see an overview of which activities have already been imported and begin importing new activities.

- ⇒ **Click the “Begin import” button, on the left hand side under “New activities”. That will allow you to begin the process of importing these activities to the AIMS. Nothing will be written to the AIMS until the end of the import process.**

This screen contains several other panels (you can skip this section if you are just trying to import for the first time):

- Mapped activities** – which shows the activities you have already imported (or mapped, from IATI to the AIMS). You can click “View Details” to see a list of activities already imported, or click “Adjust import preferences” to determine whether you should generally take data from IATI or from the AIMS for specific fields.
- Assigned activities** – which shows activities that have been assigned to you (where other organisations think you are the Managing DP of their activities). In most cases, this will be empty.
- Co-financed projects** – if you have any assigned activities (see point b. above), then if you mapped any of these activities to a project you manage, you will see those activities listed here.
- Trust fund projects** – if you have any assigned activities (see point b. above), then if you mapped any of these activities to a trust fund you manage, you will see those activities listed here.
- Delegated activities** – which shows activities you have delegated to another organisation (where your activities are implemented by another Managing DP). You can choose to recall these activities if they have not yet been mapped by the other organisation.

Finally, there are two buttons in the top right hand corner:

- **Restart:** if you are part way through importing your activities, you will be returned to the last point you were at in the import process. You can click “Restart” to start the import process again from scratch. If you made a mistake or if something goes wrong, it is a good idea to try this button and starting again – but remember, you’ll lose progress up to this point.

- **Your username** (aimsiasi in the screenshot above): clicking on this button will allow you to chose to go back to the Dashboard page if you are part way through an import process. This button also gives you the option to log out.

### 3.1 Select project structure (optional)

Some donors will have multiple levels of activities in their data – for example, projects and sub-components. **However, most donors do not have multiple levels. In this case, this screen will automatically be skipped. If you don't see this screen, move to the next section.**

We attempt to automatically select the most relevant level to map from, by matching the project IDs at each level in your IATI data with those already entered to the AIMS. You can normally go with our recommendation. However, if the percentage listed is greater than 0 for both levels (as shown in the screenshot below), you may want to go back into the AIMS and make sure you're consistently using project IDs from one level (probably the recommended level), rather than from a mix of levels.

- ⇒ **Select the correct level to map from, then click Next**. If a level is recommended, you should probably proceed with the recommendation, unless you have good reasons to think that is problematic.

Level	Sample data	% matched	Select
1	XM-DAC-41114-PROJECT-00011492 Urban Poverty Alleviation	2.86	<input type="radio"/>
2	XM-DAC-41114-OUTPUT-00058224 Urban Partnerships for Poverty	45.83	<input checked="" type="radio"/>

You may also see the following warning at the top of the page:

It looks like you use multiple levels of activities in your data (for example, projects and sub-components). We've compared your activities against those found in the AIMS, but we could not match any of your projects in IATI to the AIMS. Before proceeding, we recommend you go back to the AIMS and check your activities are using the same project codes in the AIMS as those used in IATI.

As the message states, in this case, no projects could automatically be matched between IATI and the AIMS through comparing the project IDs. It is strongly recommended to go back to the AIMS and check project IDs are correct and in the same format as those used in your IATI data. This is a good idea as it will significantly speed up the import process later. If you don't do this, you will have to manually map projects later.

## 3.2 Filter for relevant projects

Not all projects published in your IATI data will be relevant for importing into the AIMS. On this screen, you can manually include or exclude projects. We have automatically deselected projects that have less than 20% of the spend in Bangladesh (the rest presumably spent in other countries). You probably don't need to do anything on this page, but you can manually include or exclude projects if you want.

⇒ **Select or deselect projects to import, then click Next at the bottom of the page.**

The screenshot shows the AIMS IATI Import interface. The top navigation bar has 'AIMS IATI Import' and 'Restart'. The left sidebar lists steps: 'Begin import', 'Select project structure' (selected), 'Filter relevant projects' (expanded), 'Implementing organisations', 'Review matched projects', 'Set import preferences', and 'Review and import'. The main content area is titled '2. Filter for relevant projects' with sub-sections '2.1 Select relevant projects' (selected) and '2.2 Select project components'. It explains that some activities at headquarters level are filtered out. A list of filters includes: 'less than 20% is tagged as Bangladesh' and 'the project is not currently being implemented (i.e. excluding pipeline and closed projects)'. A table shows a single project: NL-1-PPR-13546, Integrated water management SW, 100%, Project-type interventions, Implementation, with an included checkbox checked.

Project ID	Project Title	% to BD	Aid type	Status	Include
NL-1-PPR-13546	Integrated water management SW	100%	Project-type interventions C01	Implementation	<input checked="" type="checkbox"/>

If you have multiple levels of activities in your data, you will then also be able to exclude certain project sub-components on the following page. Most donors won't need to do anything on this page and can just click Next again.

## 3.3 Implementing organisations

This page will seem a little complicated at first, but it is not so bad once you get the hang of it. We're trying to do two things here:

- a. map implementing organisations in your IATI data to those already captured in the AIMS
- b. determining which projects are likely implemented by other Managing DPs, to avoid double counting.

### 3.3.1 Map implementing organisations

We list all the implementing organisations found in your data (once for all projects – not per project).

⇒ **For each organisation, you need to classify the organisation by determining two things:**

- a. Firstly, what sort of organisation is this? Bangladesh government, a DP (donor) or an NGO or private sector organisation
- b. Secondly, specifically which organisation is it? Select from a dropdown box or creating a new organisation by clicking **New** if the organisation isn't listed.

If the organisation listed is not a specific organisation but rather something more general (e.g. "INTERNATIONAL NGO", "NATIONAL EXECUTION", "GOVERNMENT"), then click the **Unknown** button.

Proceed row by row, working from left to right within each row.

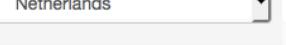
Org name	Org type	Select organisation
Actionaid International	BD Govt. DP NGO / Private Unknown	Actionaid International <input type="button" value="New"/>
ANNE FRANK STICHTING	BD Govt. DP NGO / Private Unknown	ANNE FRANK STICHTING <input type="button" value="New"/>
AsDB	BD Govt. DP NGO / Private Unknown	Asian Development Bank <input type="button" value="New"/>
BLAST	BD Govt. DP NGO / Private Unknown	BLAST <input type="button" value="New"/>
Brac	BD Govt. DP NGO / Private Unknown	BRAC <input type="button" value="New"/>
Care International	BD Govt. DP NGO / Private Unknown	Care International <input type="button" value="New"/>
Clean Clothes Campaign	BD Govt. DP NGO / Private Unknown	Clean Clothes Campaign <input type="button" value="New"/>

⇒ **Once you've finished mapping all the implementing organisations, click **Next****  
**Page 9**

### 3.3.2 Determine managing DP (donor)

On the next screen, you will see your list of projects again. Using the information provided in the previous screen, the system attempts to guess which projects are managed by another donor. For most of your projects, you will probably be the managing DP. However, if you know that a project is managed by another organisation, you should select that organisation in the last column. This is important to avoid double counting.

- ⇒ **Select the managing DP for each project and click  . When prompted whether you would like to delegate projects to other Managing DPs, click “Yes”**

Project ID	Project Title	Implementing organisation	Managed by
NL-1-PPR-13546	Integrated water management SW	Asian Development Bank 	Asian Development Bank 
NL-1-PPR-21288	Support Public Expenditure Mgt	World Bank 	World Bank 
NL-1-PPR-21315	Support Parliamentary reform	United Nations Development Programme 	United Nations Developmen 
NL-1-PPR-21338	Sexual Reproductive Health	ICDDR,B 	ICDDR,B 
NL-1-PPR-21607	Char Development/Settlement	Euroconsult Mott Macdonald 	Netherlands 

You can also click the  button next to each project to see how the implementing organisations stated in your IATI data have been mapped to organisations in the AIMS, using the information you provided in the previous step. If no organisations could be mapped for a project, then you can manually enter this information in the AIMS later.

### 3.4 Review matched projects

Your IATI activities will then be automatically mapped to the AIMS where possible. You can review the matches and map unmatched IATI projects to the AIMS. You can also choose to import unmatched IATI projects as new projects.

- ⇒ **Review and adjust the way projects are matched between IATI and AIMS, and then click  .**

## 4. Review matched projects

Based on your answers to the preceding questions, we have mapped your IATI activities against the AIMS in the following way.

### IATI projects matched to the AIMS

IATI Project ID	IATI Project Title	AIMS Project ID	AIMS Project Title
NL-1-PPR-13546	Integrated water management SW	13546	Integrated water management South West Bangladesh
NL-1-PPR-18769	DHA PERP Server Stations	18769	CSSED Server Stations
NL-1-PPR-21288	Support Public Expenditure Mgt	21288	Strengthening Public Expenditure Management Programme
NL-1-PPR-21315	Support Parliamentary reform	21315	Support Parliamentary reform

To match unmatched projects, you will see the following screen, listing your IATI activities.

- **Filter through the list of activities** – by entering either part of a project ID or project title to the text boxes at the top of the table.
- **Map to an existing AIMS project** – including those that already have IATI projects mapped to them – by clicking the drop-down box and selecting the AIMS activity.
- **Create a new project in the AIMS** – importing this IATI activity as a new project in the AIMS – by clicking the drop-down box and selecting “Create New” at the bottom.

### IATI projects not found in the AIMS

The following projects were found in IATI but not in the AIMS. You can manually map them to existing projects in the AIMS, or choose to create new projects in the AIMS.

IATI Project ID	IATI Project Title	AIMS Project
<input type="text" value="Project ID"/>	<input type="text" value="Project title"/>	
 NL-1-PPR-24071	PSD Support fund	<input type="button" value="Don't Import"/>
 NL-1-PPR-25504	Urban Dredging Project	<input type="button" value="Don't Import"/>
 NL-1-PPR-25758	Human Rights Fund	<input type="button" value="Don't Import"/>

## 3.5 Set import preferences

On this screen, you determine whether data should generally be taken from IATI or the AIMS. We show you one sample project to help you determine this. You can also edit preferences for individual projects on the next screen.

- ⇒ **For each field, decide whether data should be taken from IATI or the AIMS, by clicking on the relevant side to turn the box green. Then click  . You'll be**

**prompted to save these preferences for next time – we recommend you select “Save and next”.**

## 5. Set import preferences

Please specify whether you would generally prefer to take data from IATI or from the AIMS. You can see some sample data below to help you decide. Later, you will be able to adjust the import settings for individual projects.

You can adjust whether data is taken from IATI or from the AIMS by clicking on the relevant data source for each field. Whichever side is marked as **green** will be used as the default preference for your projects.

IATI	AIMS
title Integrated water management SW	title Integrated water management South West Bangladesh
description Integrated planning at decentralized level	description Integrated water management South West Bangladesh

## 3.6 Final review and import

You'll then see the final screen, where you can review the way activities are matched between IATI and the AIMS, edit individual preferences, and review financial data.

⇒ When you're ready to import the projects, click **Import projects**.

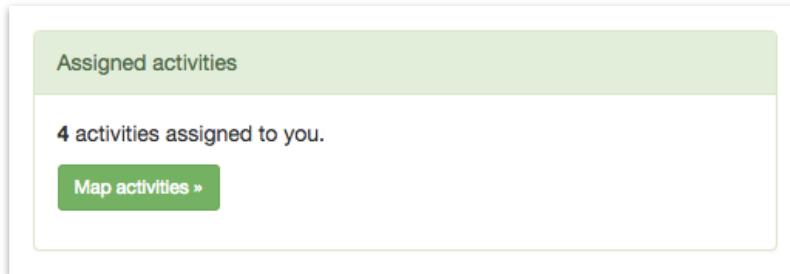


On this page, there are several icons:

- highlights that the disbursement or expenditure figures vary significantly between IATI and the AIMS, so you may want to pay close attention to these projects.
- allows you to edit the preferences regarding where data should be taken from for this activity for individual fields – for example, if you would prefer the description already entered in the AIMS to be retained instead of importing the data from IATI.
- allows you to see the way that the individual financial transactions have been calculated and converted to USD.
- allows you to remove a project from processing, meaning that it will not be imported or updated.

## 4. Delegating projects (co-financed and trust fund projects)

If you are the managing DP of another organisation's projects (such as the World Bank or UNDP), then on the Donor Dashboard screen (section 3.0 above), you will see something like the following box appear:



This means that other organisations have assigned (or delegated) their activities to you, as they think that you are the managing DP of their activities. If you map their activities to your projects or trust funds, then the data about their contributions to your projects / trust funds can automatically be updated.

⇒ Click on **Map activities >** to begin

### 4.1 Map delegated activities to your own projects and trust funds

You then need to map the delegated activities to one of your projects or trust funds. The projects and trust funds must already exist in the AIMS for this functionality to work.

⇒ **Map activities to one of your projects (if it is a co-financing arrangement) or a trust fund. Then click **Next**.**

#### 🔗 Activities delegated from other DPs

Other DPs have delegated the following activities to you. They are probably contributions to projects that you manage.

Please map these activities against your own projects or trust funds.

Activity title	Reported by	Map to project	Map to trust fund
Health Sector Development Programme (HSDP)	Department for International Development	BD: Health Sector Development Program	Select one...

## 4.2 Select financial data

Given that there are potentially multiple organisations contributing to the same activities, you need to decide whether you want to include their financial data in your projects. On this page, you can select whether to include financial data from each donor alongside your projects.

⇒ **Using the checkboxes, determine whether financial data should be included from these organisations alongside this project in the AIMS. Then, click [Save Preferences »](#).**

### 🔗 Co-financing

For co-financed projects, we need to establish which financial data should be retained – from all reporting organisations or only from one.

You can deselect commitments, disbursements and planned disbursements for each organisation below.

#### BD: Health Sector Development Program

Provider Org	Source	Commitments	Include C?	Disbursements	Include D?	Planned Disbursements	Include PD?
World Bank	AIMS	\$356,332,326.22		\$340,480,797.94		\$0.00	
Department for International Development	IATI	\$190,215,261.21	<input type="checkbox"/>	\$166,675,908.02	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>

The interface for trust funds looks much the same, except that you only need to determine whether commitments should be included or not (disbursements and planned disbursements are not captured in the AIMS for trust funds).

## **5. Troubleshooting**

If you have problems using the IATI import module, there are a few different things you could try:

### **5.1 You are unable to log in**

Your login details to the IATI Import module are the same as those you use for the AIMS. If you are unable to log in, contact ERD: [aimsbd.feedback@gmail.com](mailto:aimsbd.feedback@gmail.com)

### **5.2 Your data looks strange in the import module**

If your data looks strange in the user interface, this could be due to the way that your data is being published by your headquarters. Have a look at your data on [D-Portal](#), or contact your colleagues working to publish your data at headquarters level.

### **5.3 An unforeseen error occurs**

If an unforeseen error occurs (or the module stops working), you can try a few steps:

- Check your internet connection is working – open up a new browser window and try to navigate to another website (not your intranet!)
- Logout – click your username from the top right and then “Logout”. Then log back in again. This can help to clear any issues if your login has expired.
- Click the “Restart” button – this will lose any work up to this point on importing your projects, but it could also help to clear any strange issues.

At this stage, other support options are very limited, as ERD are currently not able to provide advanced technical support with each organisation’s IATI data. If for some reason you are not able to use the IATI import module, you can continue to enter your data manually into the AIMS as before.

## **6. Process for quarterly reporting**

Each quarter, DPs are requested to provide data to ERD by using the AIMS. Once you have begun using the IATI import module to report your data to the AIMS, this will change your processes in the following ways:

1. **If you have already imported a project through the IATI import module:** you will generally no longer need to (and shouldn't) update that project manually in the AIMS. Any changes you make in the AIMS will be overwritten when the IATI import module checks for new data nightly. The latest financial data (commitments, disbursements, and planned disbursements) will be imported for this project.
  - a. **You should still check the AIMS to see that financial data for this project has indeed been updated.**
  - b. One exception to this is if you have chosen to retain data in the AIMS rather than taking it from IATI for particular fields (see section 3.5, above). If you have chosen to prefer the data already in the AIMS, data for this field will not be updated from IATI. You should continue to update this data in the AIMS manually. You can see your import preferences on your donor dashboard (see section 3.0 above). You or your former colleagues may have chosen to retain data in the AIMS if there was no or poor-quality data available in IATI.
2. **If you have not yet imported a project through the IATI import module:** you will need to import this new project to the AIMS. Log into the IATI import module and begin the import process. The module will check nightly for new projects.
  - a. If you do not see a project in the module, then you should check to see whether this data is visible in D-Portal. If you can't see the project there, contact your colleagues responsible for generating your IATI data in your headquarters.
  - b. D-Portal link:  
<http://d-portal.org/ctrack.html?country=BD&tongue=eng#view=donors>