# IATI Publisher

## User Manual v1.1

Welcome to this guide on how to use IATI Publisher. This free tool helps organisations publish data on their humanitarian and development activities following the IATI data standard. If you're new, we recommend starting from the beginning of this guide to learn how to set up, enter, and publish your organisation's data. You can also use the 'Table of Contents' on the next page to jump to a specific section.

Note: For the latest version of this user manual, visit https://publisher.iatistandard.org, as it will be updated periodically.

# Table of contents

# Registration

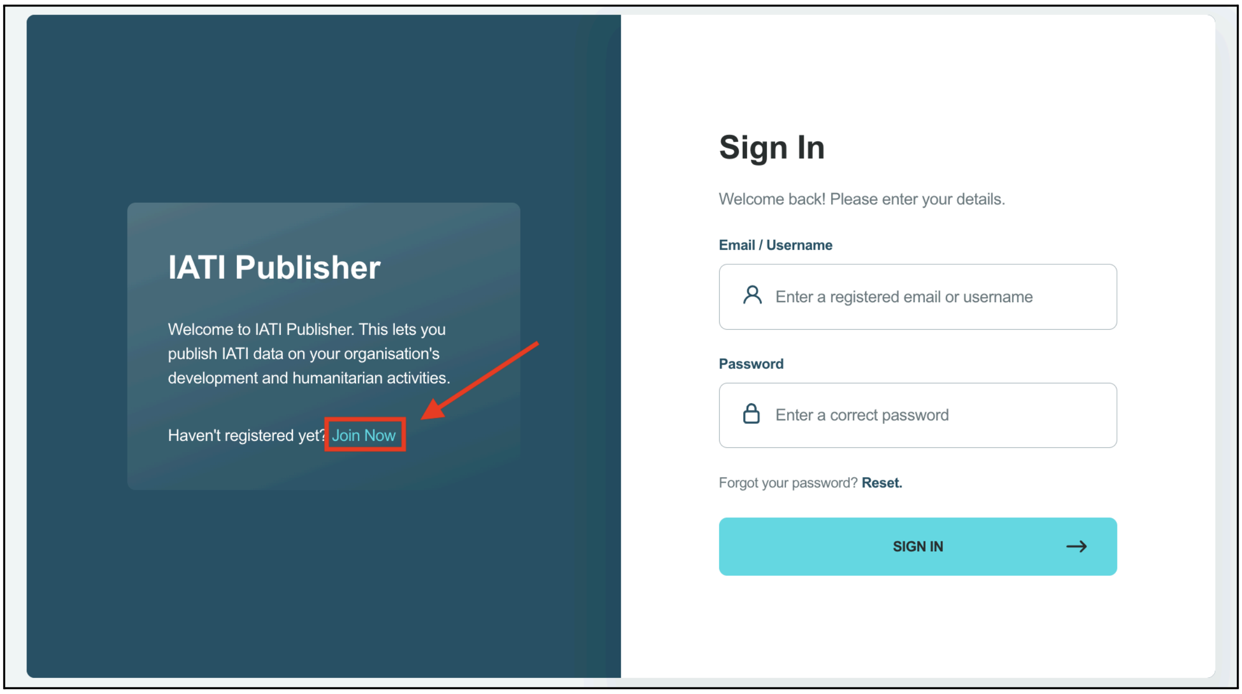
## How do I create an IATI Publisher account?

How you sign up to IATI Publisher depends on whether your organisation has previously registered with IATI or not. You can find a list of organisations that have already registered and published data on the IATI Registry.

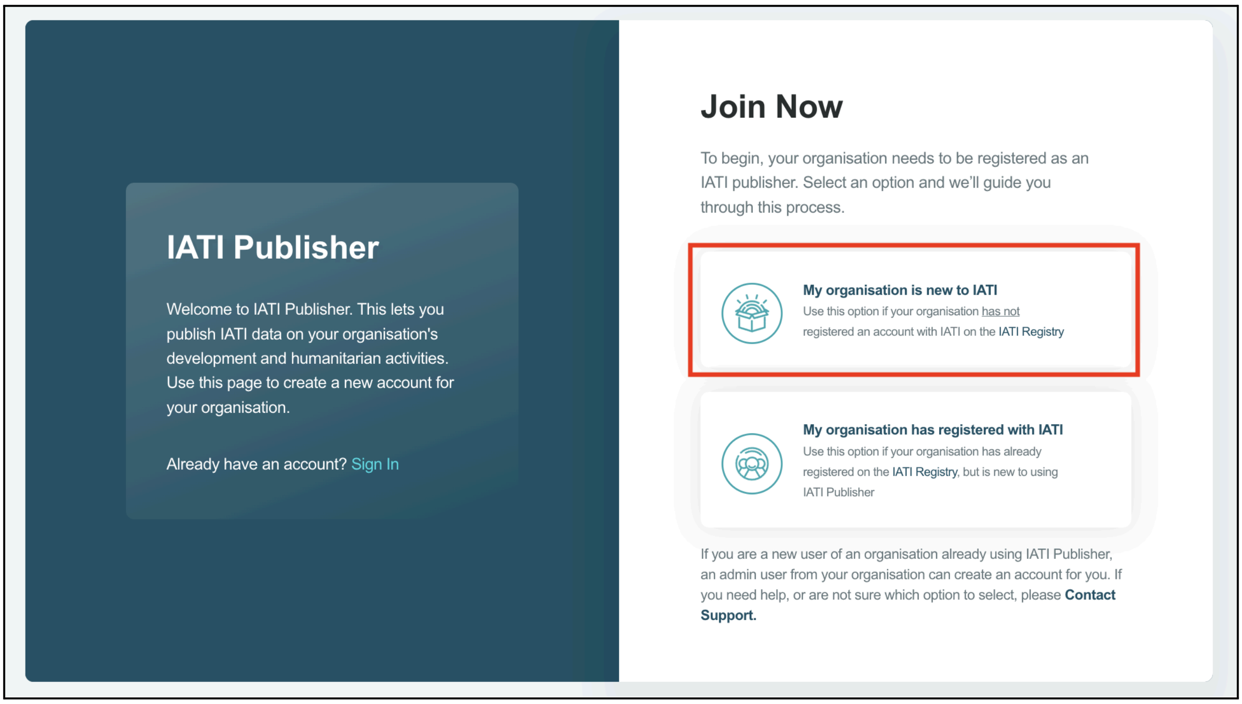
If you have never registered with IATI, follow the instructions below for Option A: My organisation is new to IATI. Otherwise, jump to Option B: My organisation has registered with IATI.

### Option A: My organisation is new to IATI

1. **On the IATI Publisher homepage, click "Join Now":**

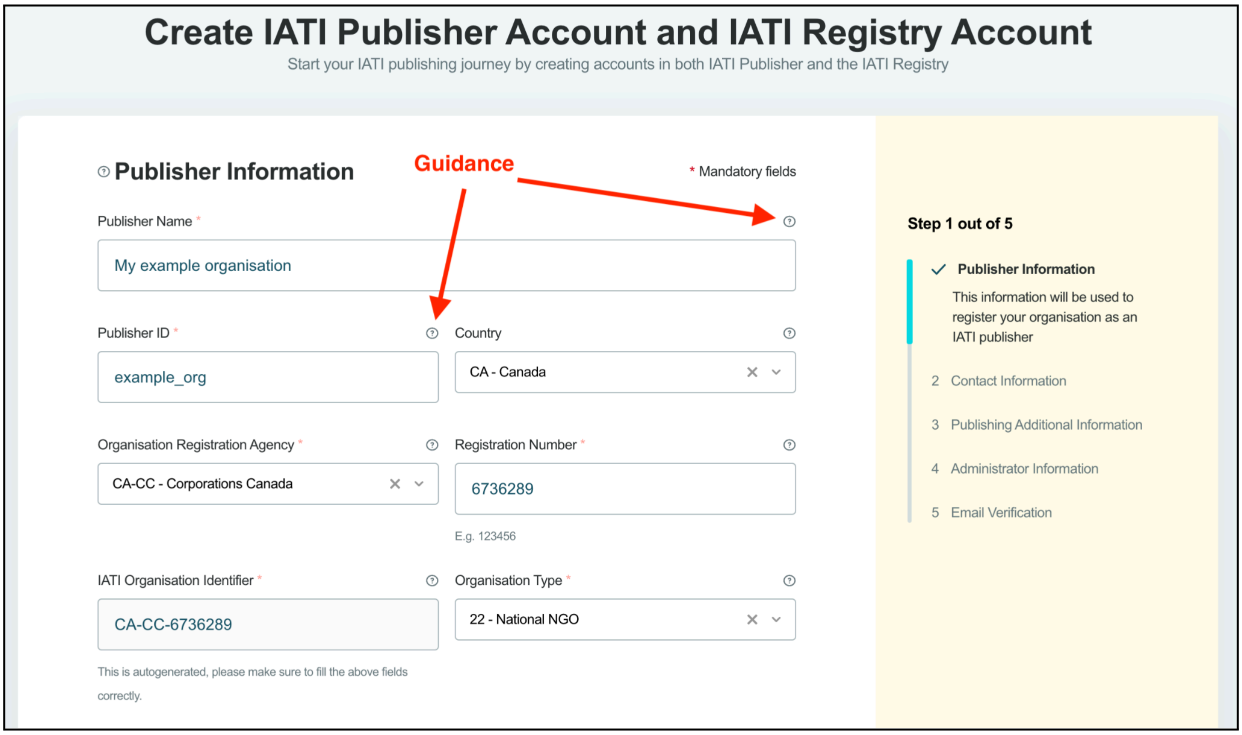


2. Select "My organisation is new to IATI":

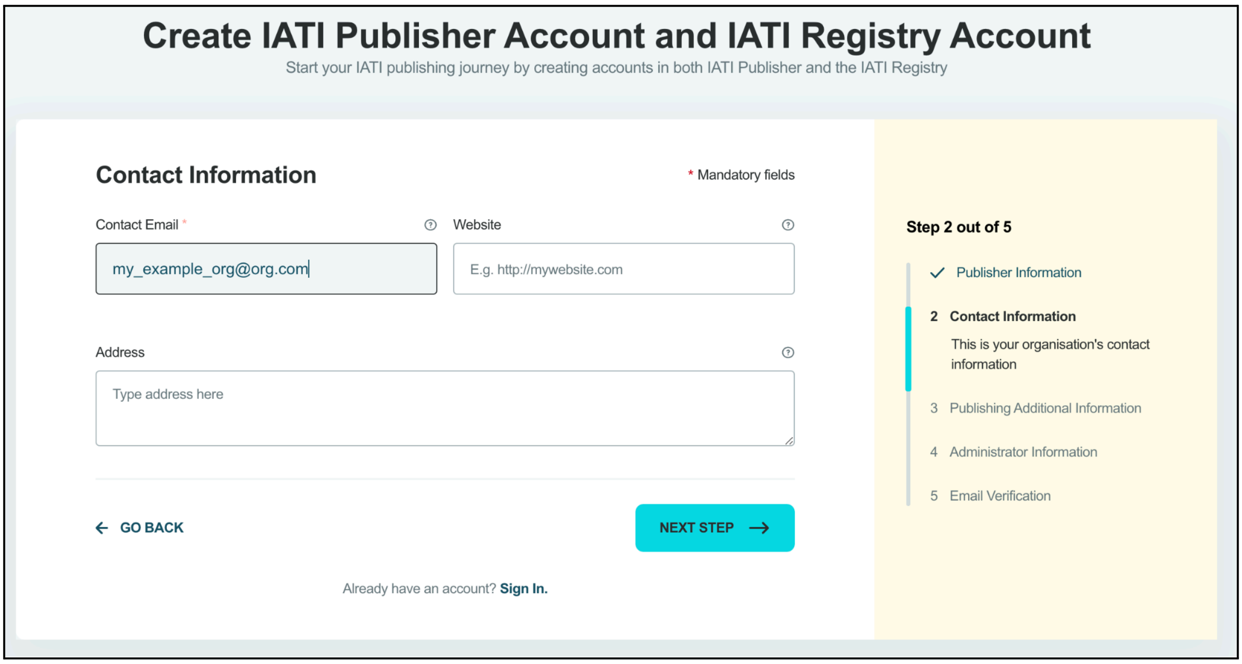



3. Enter information about your organisation for Step 1

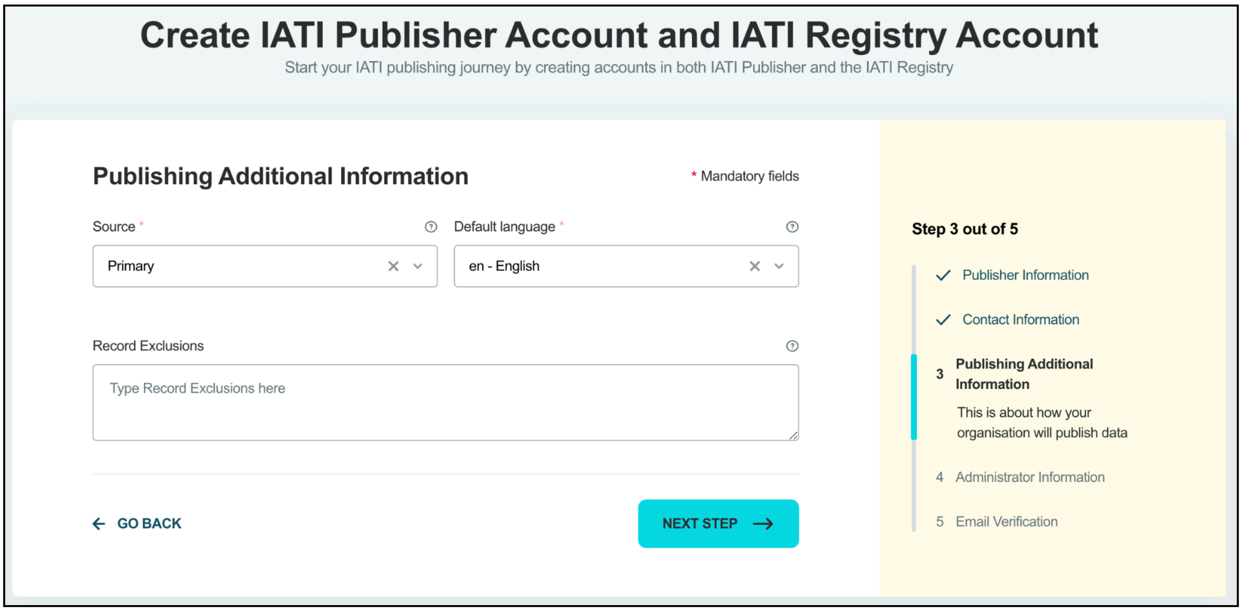
Hover your mouse over the question mark icons to view guidance on what each field means. Visit the IATI website for help with [How to create your IATI organisation identifier](#).



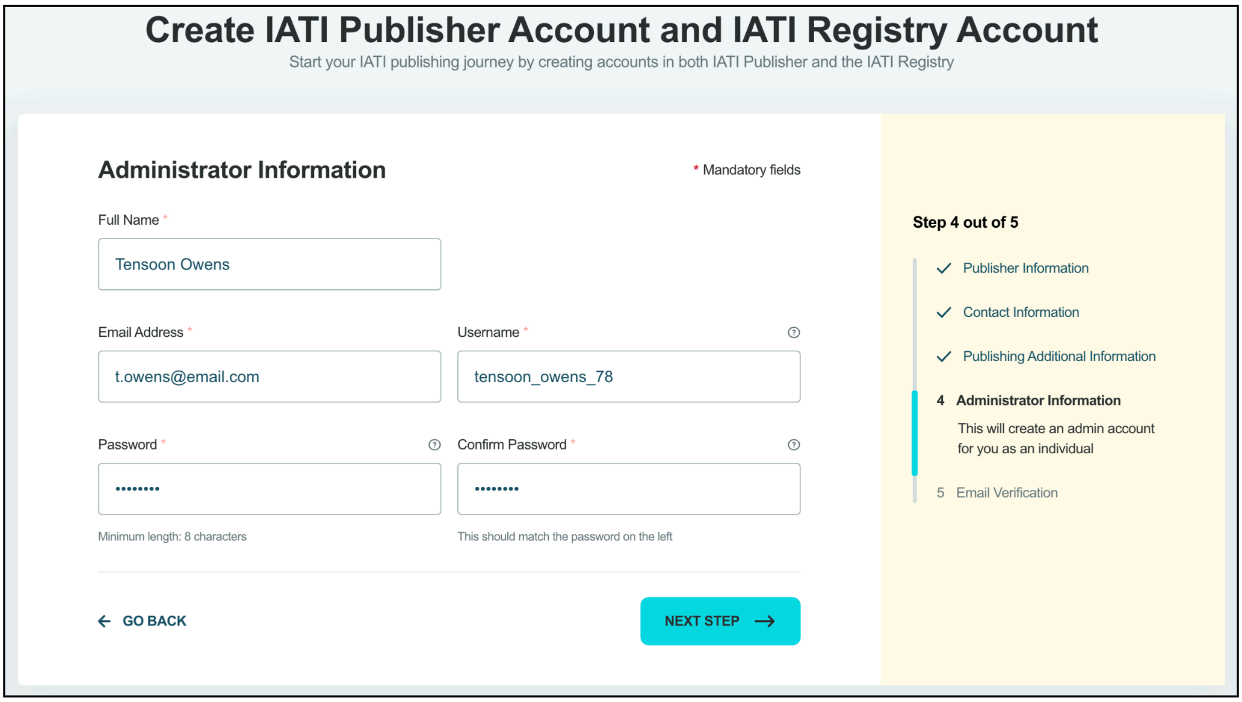
4. **Enter contact information for your organisation in Step 2:**



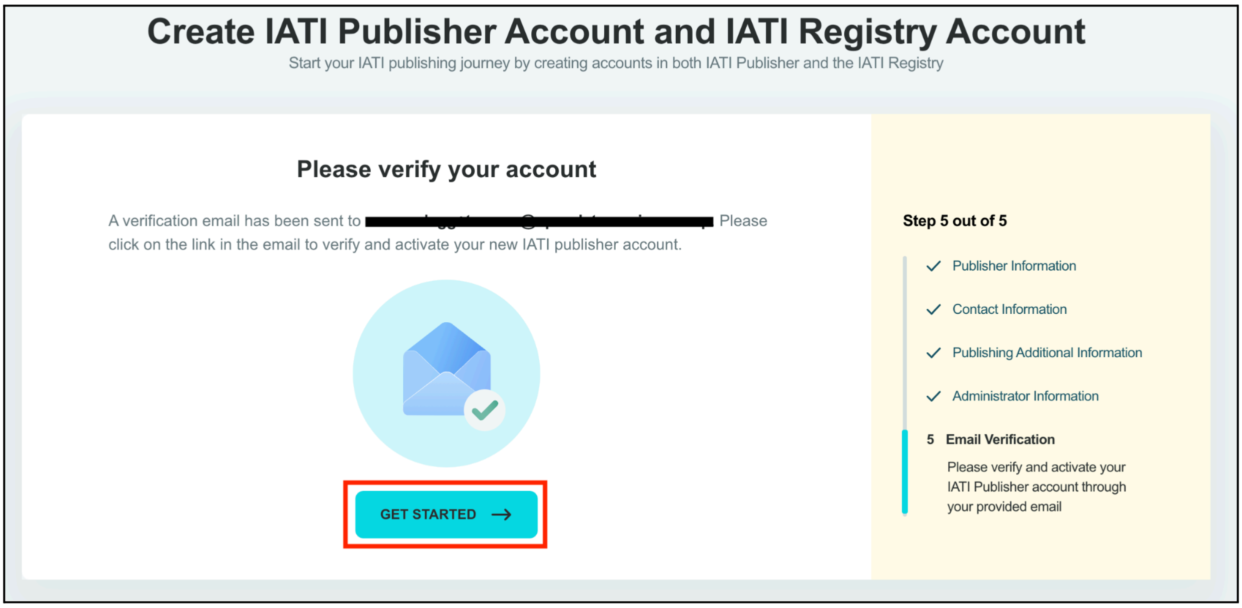

5. **Select whether you are publishing data for your own organisation** (Source = "Primary") **or on behalf of another organisation** (Source = "Secondary")



6. **Enter your own information in Step 4 to create an admin user account** (this is the email address and password that you will use to sign in to IATI Publisher)

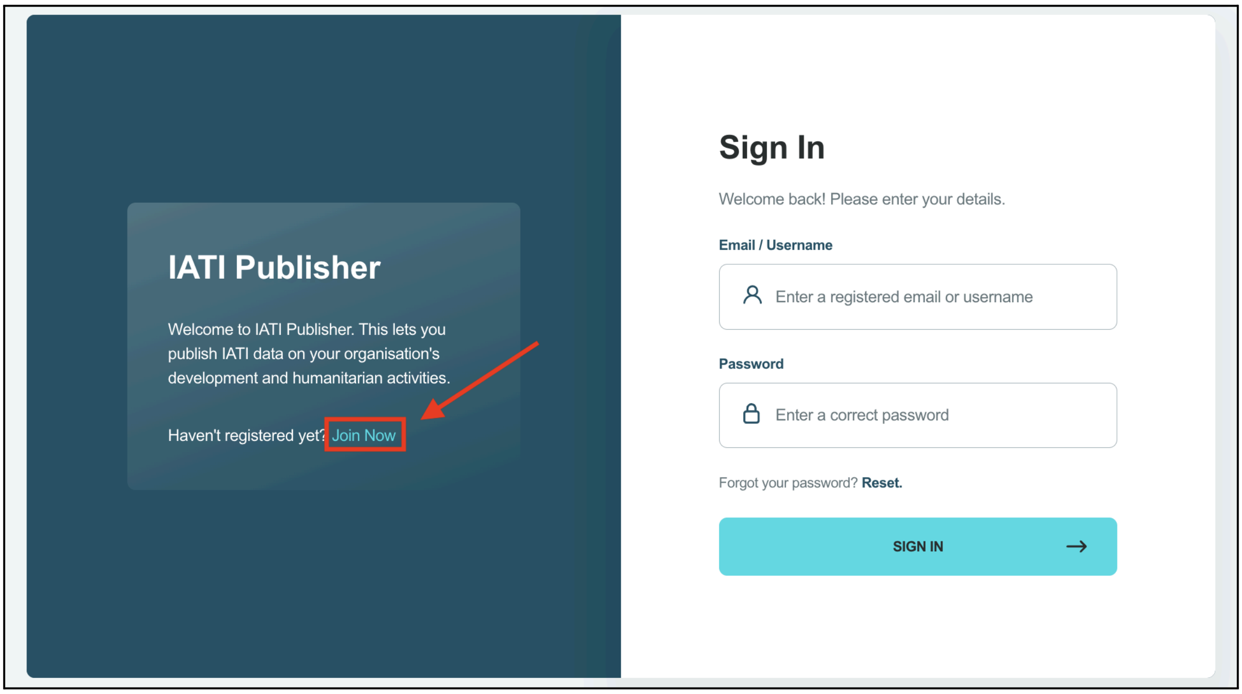



7. **Click "Get Started" to return to the homepage:**

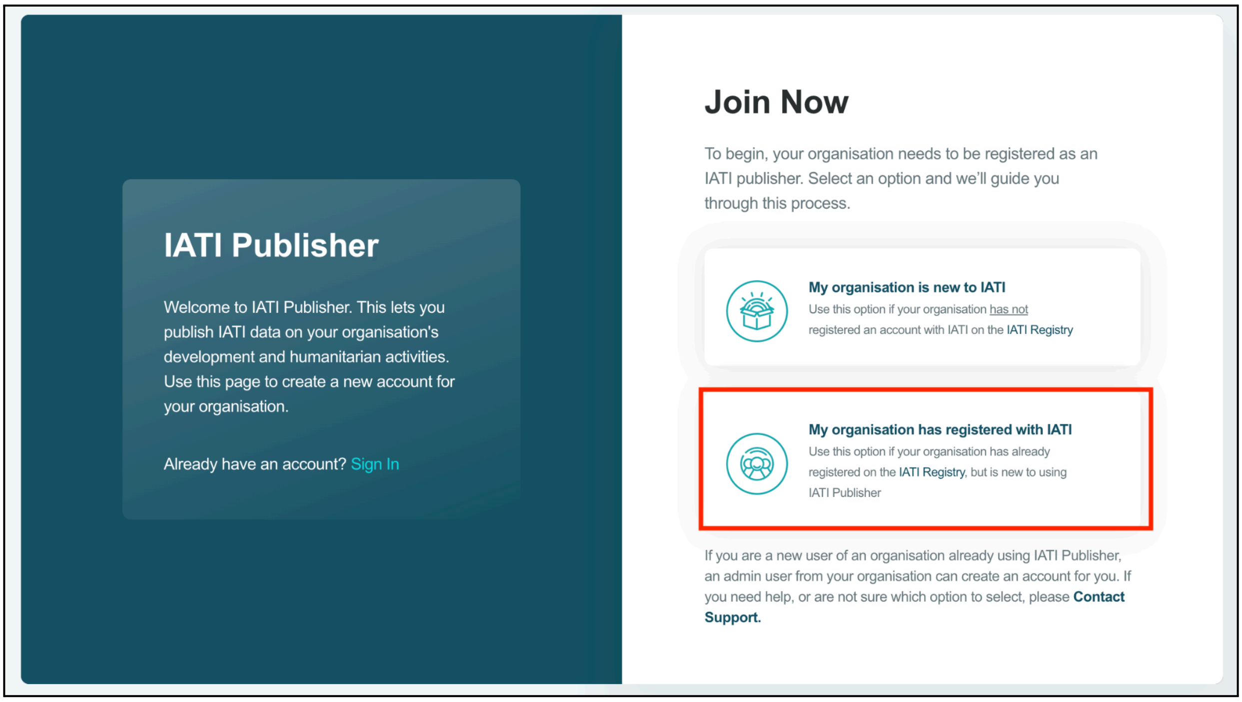


## Option B: My organisation has registered with IATI

1. On the [IATI Publisher homepage](), click "Join Now":

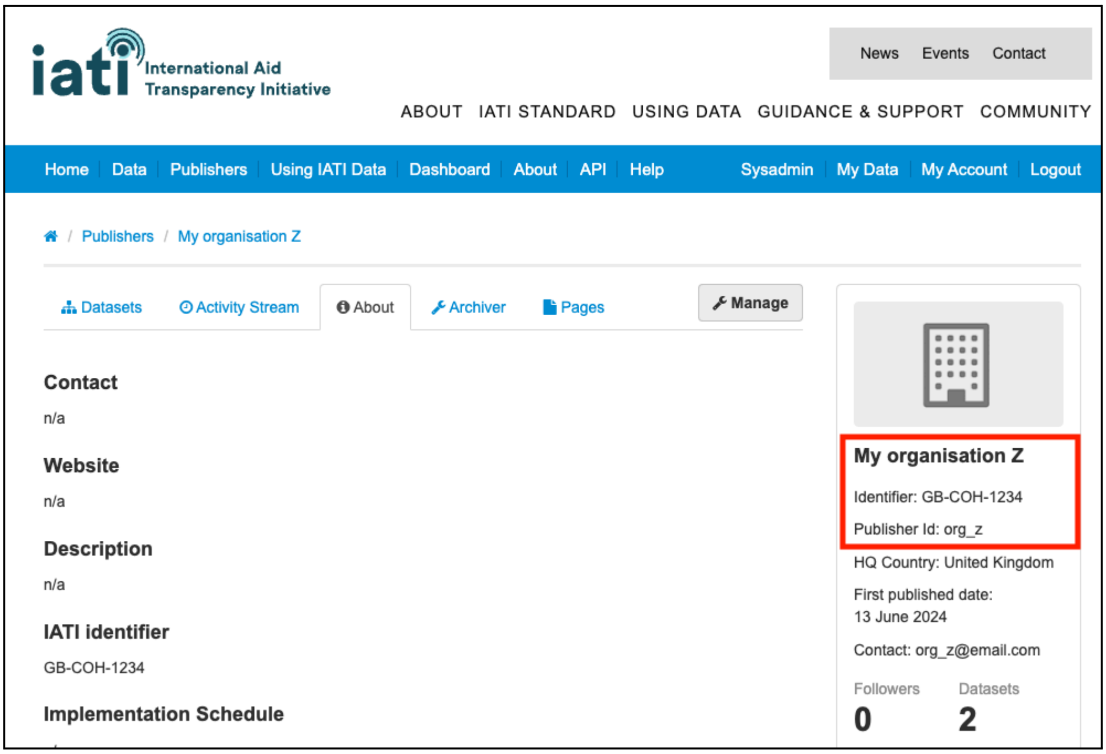



2. Select "my organisation has registered with IATI":

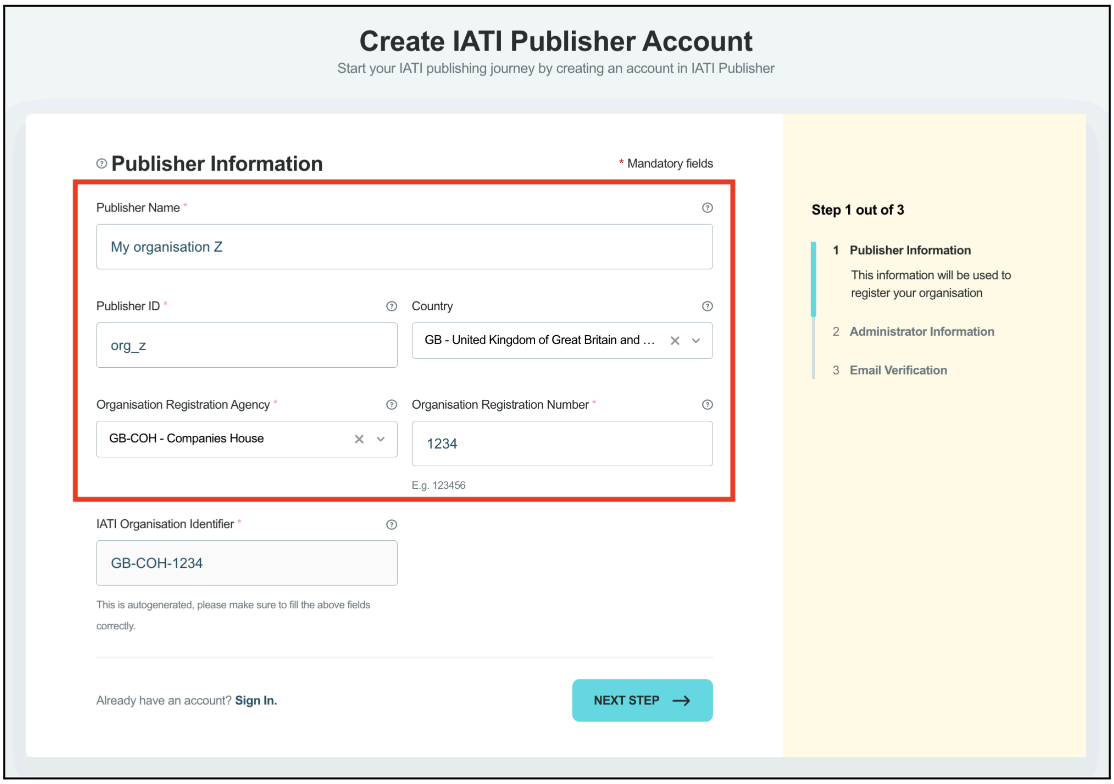


3. **Enter your organisation details in Step 1 to match your account information on the IATI Registry**

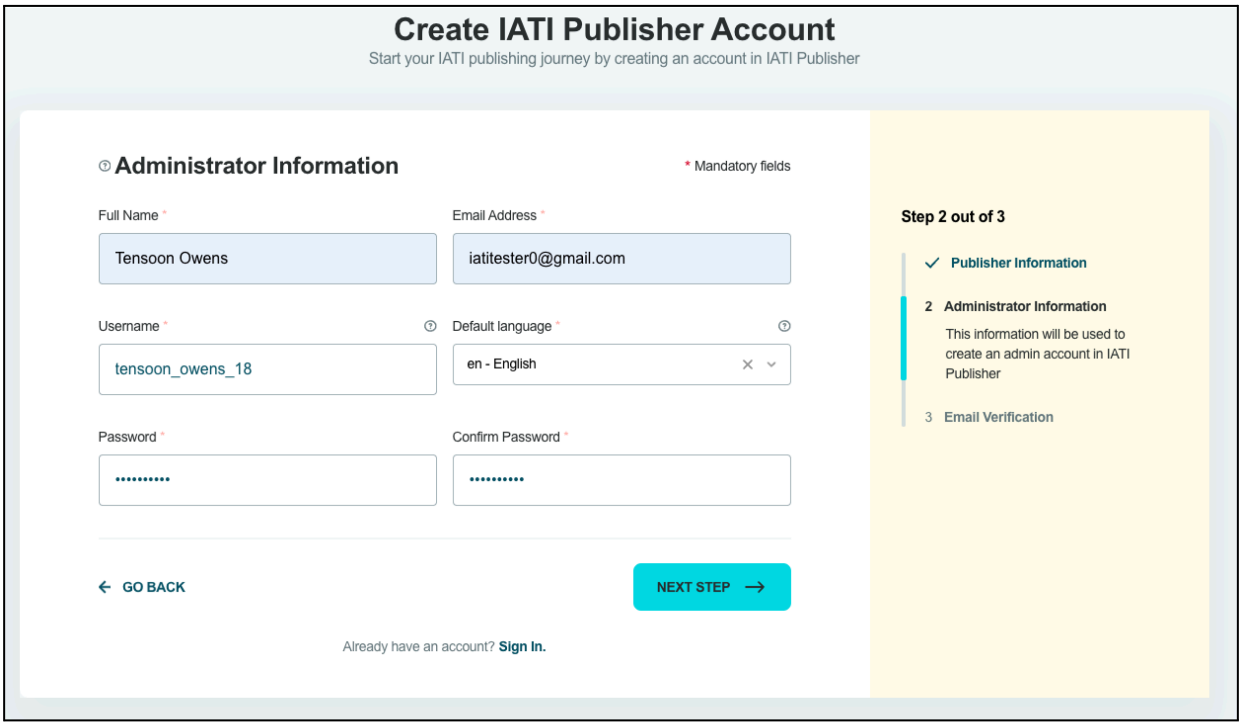
Find your organisation name, identifier and publisher ID on the [IATI Registry](#):



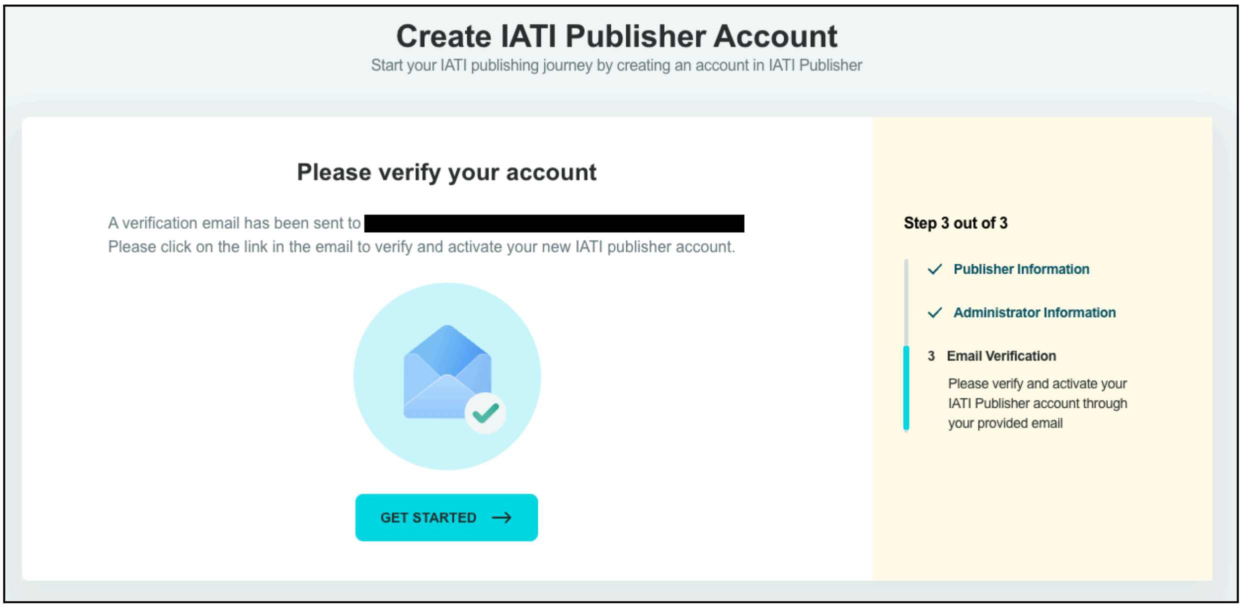

Enter the same organisation name, identifier and publisher ID in IATI Publisher:



4. **Enter your contact information in Step 2 to create an admin user account** (this is the email address and password that you will use to sign in to IATI Publisher)

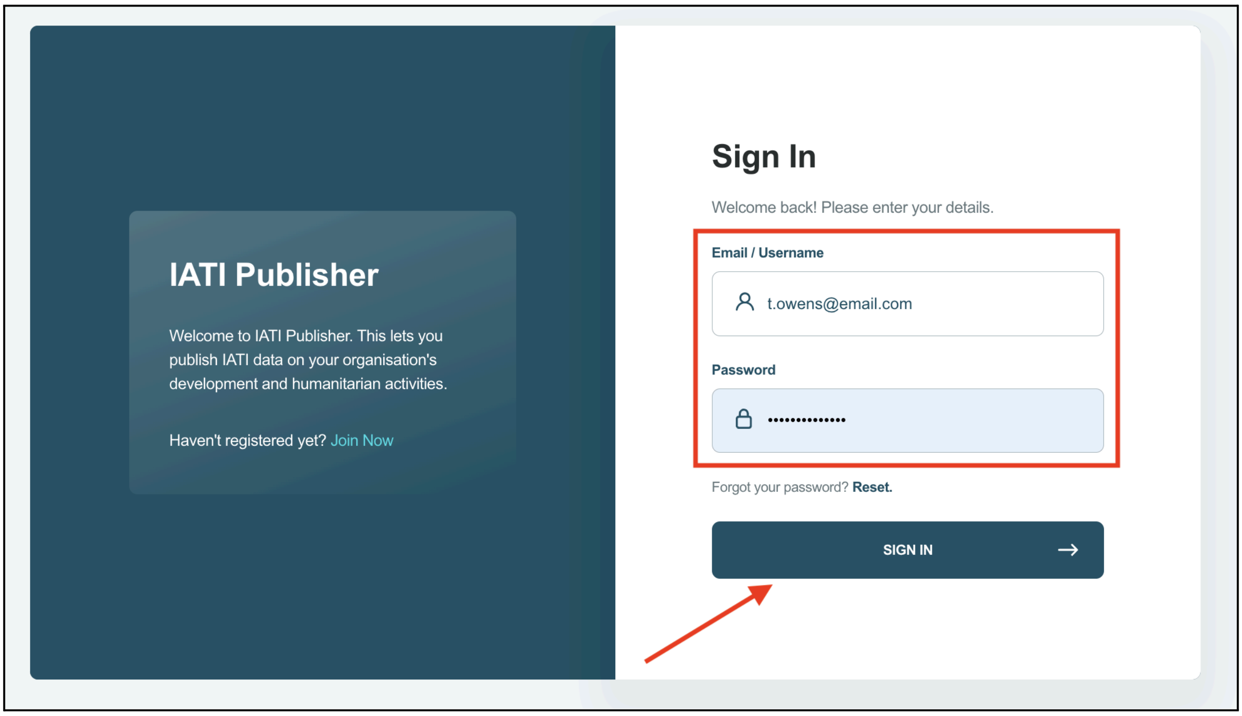



5. **Click "Get Started" to return to the homepage:**



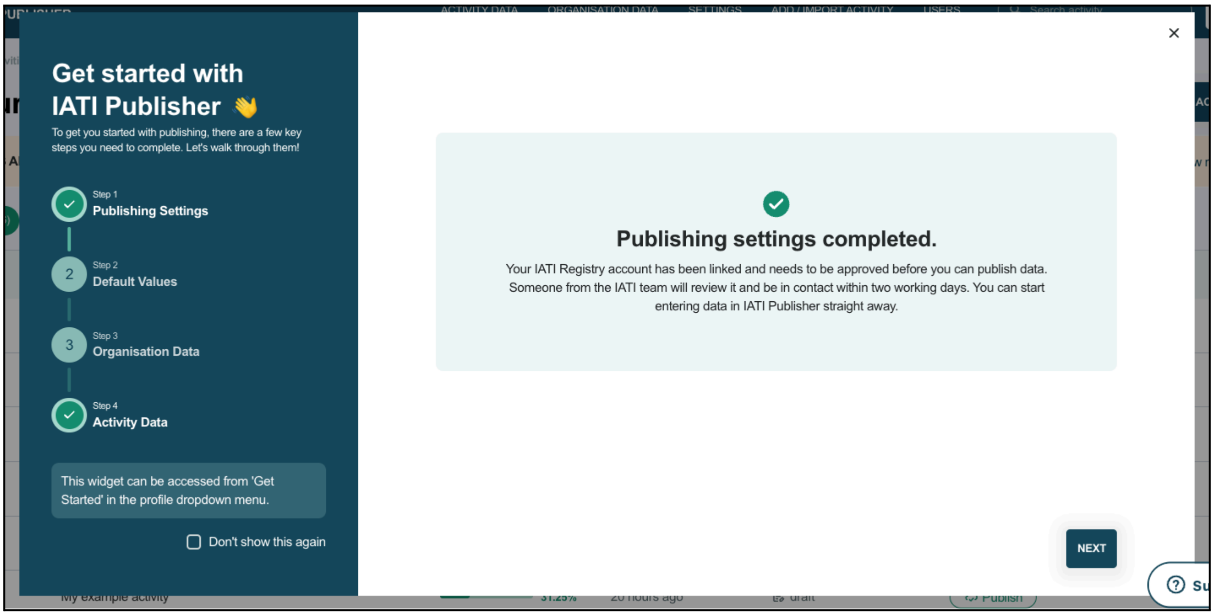
# What happens when I sign in for the first time?

1. **From the IATI Publisher homepage, enter the email address and password that you registered with, then click "Sign In":**




2. **After signing in, check your email inbox for a verification message. Use the link provided to verify your email address.**

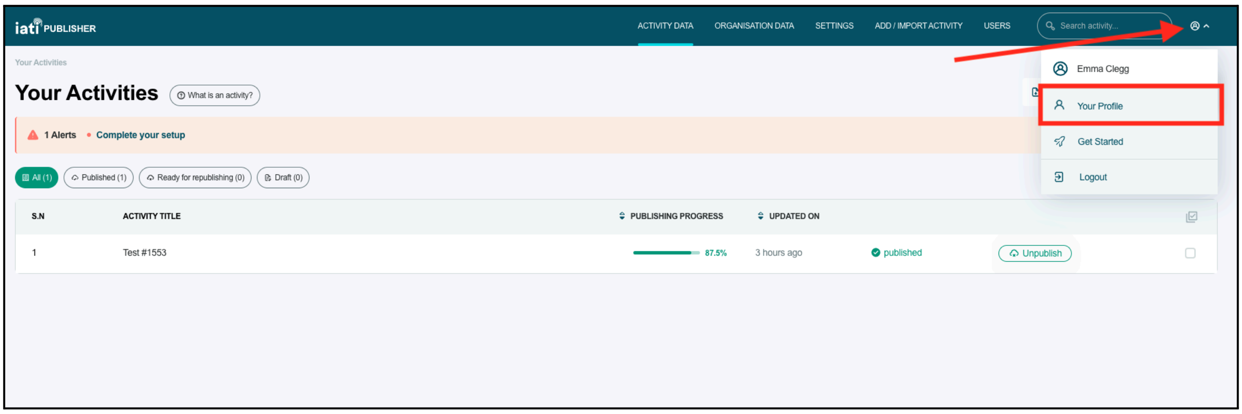
3. **When you first sign in, you will see a "Get Started" window on screen.** This will walk you through getting set up. Select "Don't show me this again" in the bottom left to stop it appearing each time you sign in.



# How do I update my profile information?

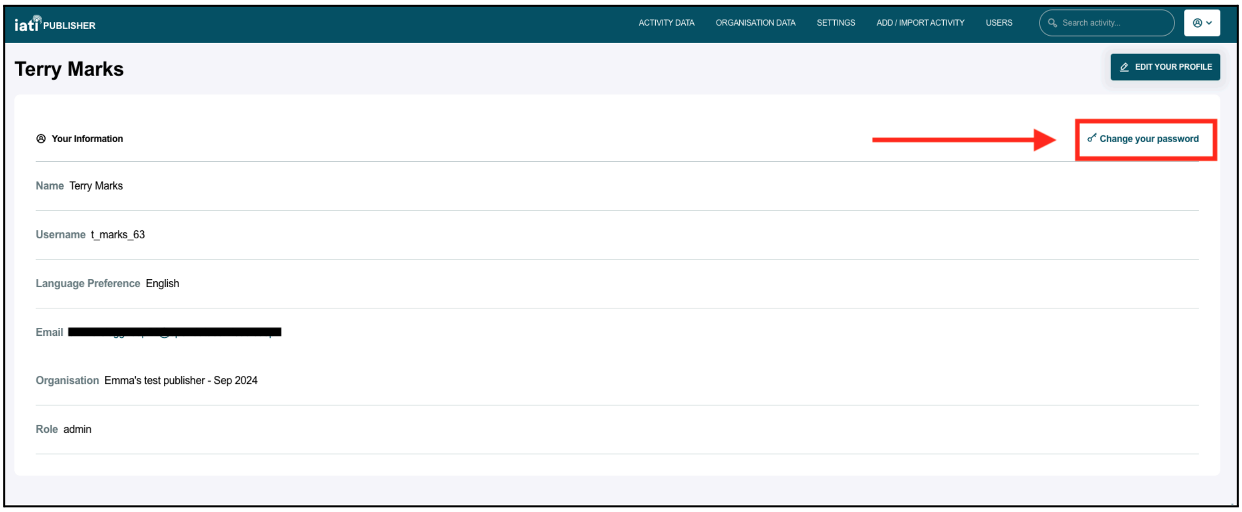
You can view or edit your account information from the Profile menu while signed in.

1. **Click on the profile icon in the top-right**
2. **Select “Your Profile” from the drop-down menu:**

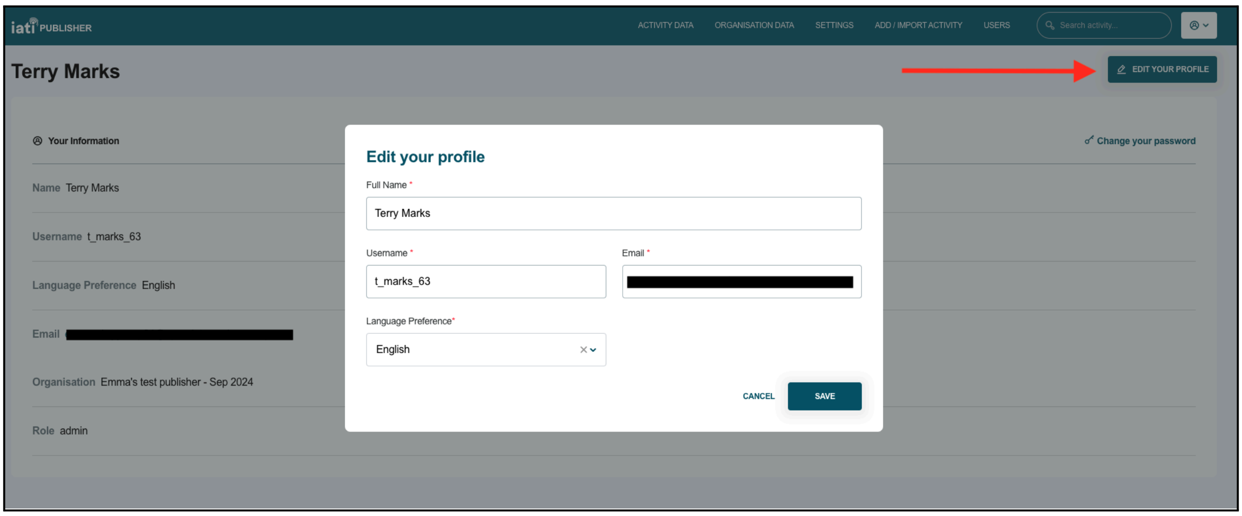



3. **Update information on your profile page when needed**

(Example) Change your sign-in password:




(Example) Edit your profile name or email address:



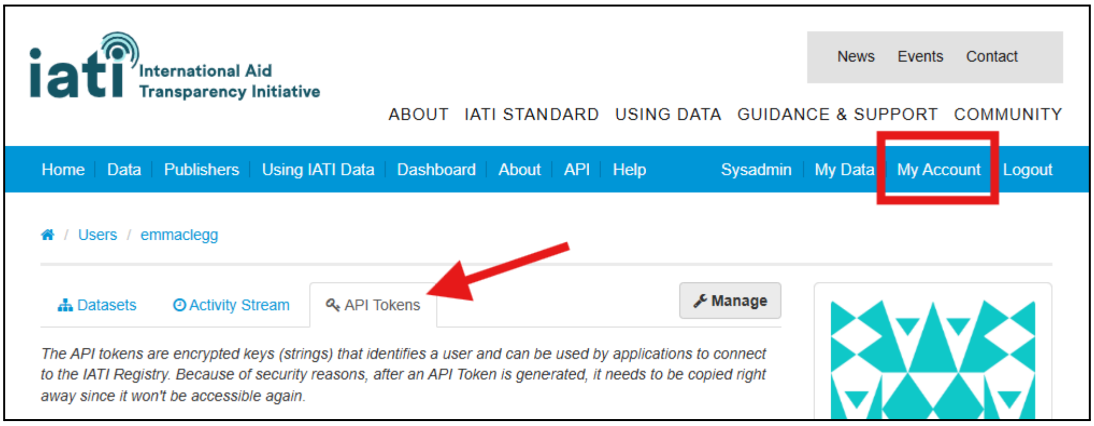
# Settings

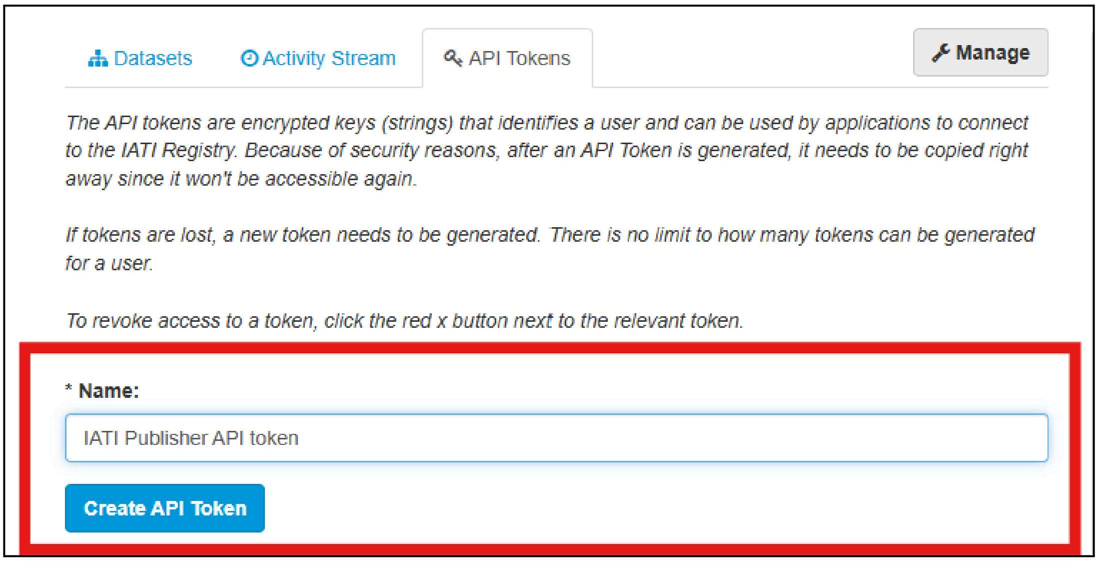
## How do I manage my publishing settings?

If you signed up via the "My organisation is new to IATI" registration route, your publishing settings will be automatically populated and you can skip to the [next section](#).

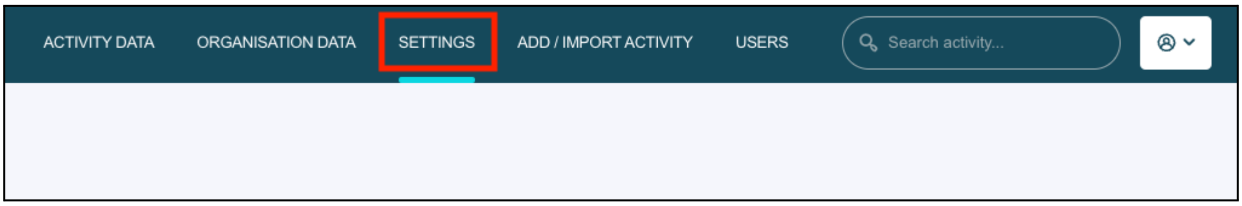
If your organisation was previously registered with IATI, you will need to link your new IATI Publisher account to your account on the IATI Registry:

1. **Generate an API token in your IATI Registry account:**
    - [Log in to the IATI Registry](#) (note - credentials for the IATI Registry are not the same as for IATI Publisher)
    - Click "My Account" in the top-right, then on the tab "API Tokens"
    - Enter a name for the new token (this can be anything)
    - Click "Create API token"
    - Copy the API token string that appears at the top of the screen

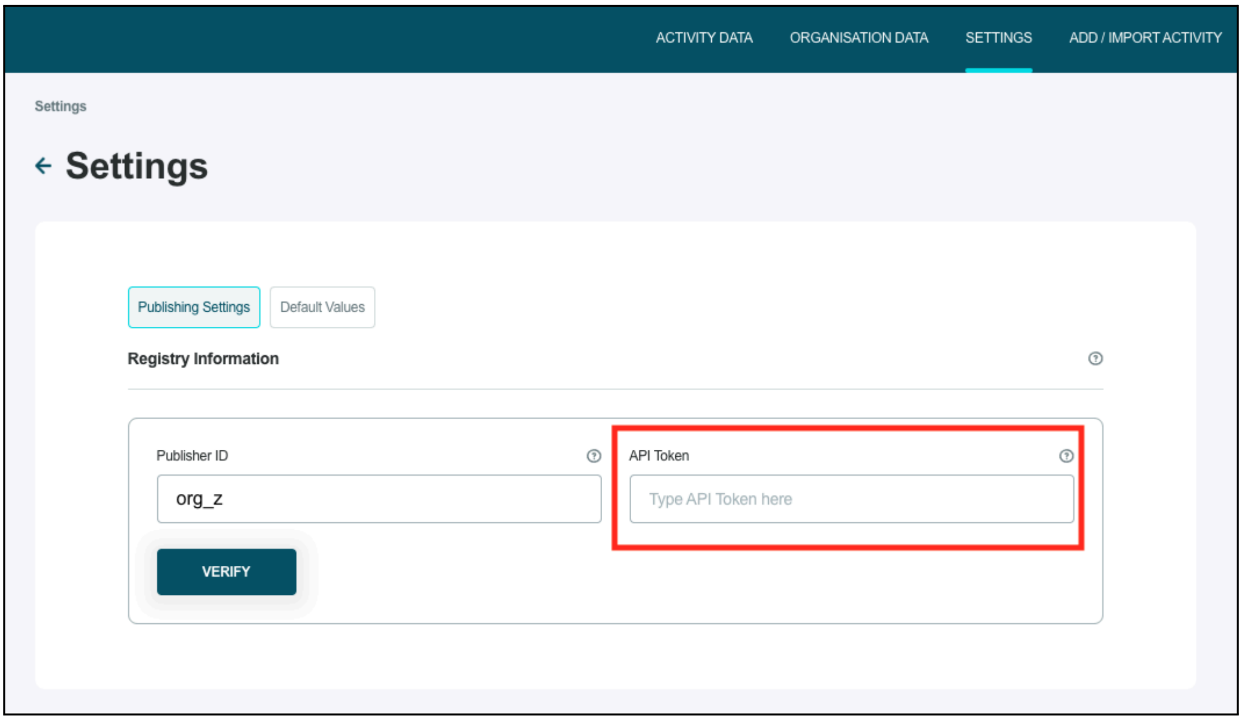


2. Go to “Settings” in the IATI Publisher main menu:

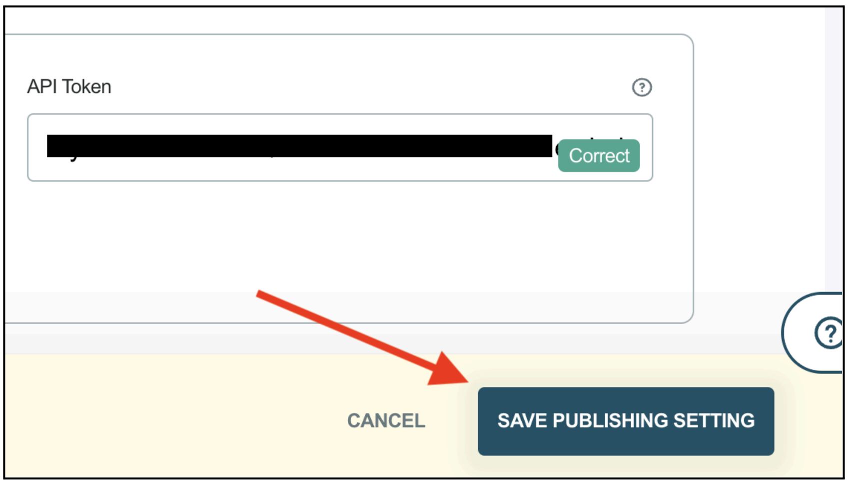



3. Paste the API token copied from the IATI Registry into the “API token” box:




4. Click the “Verify” button to check your API Token. You will see either a green “Correct” label or a red “Incorrect” one.

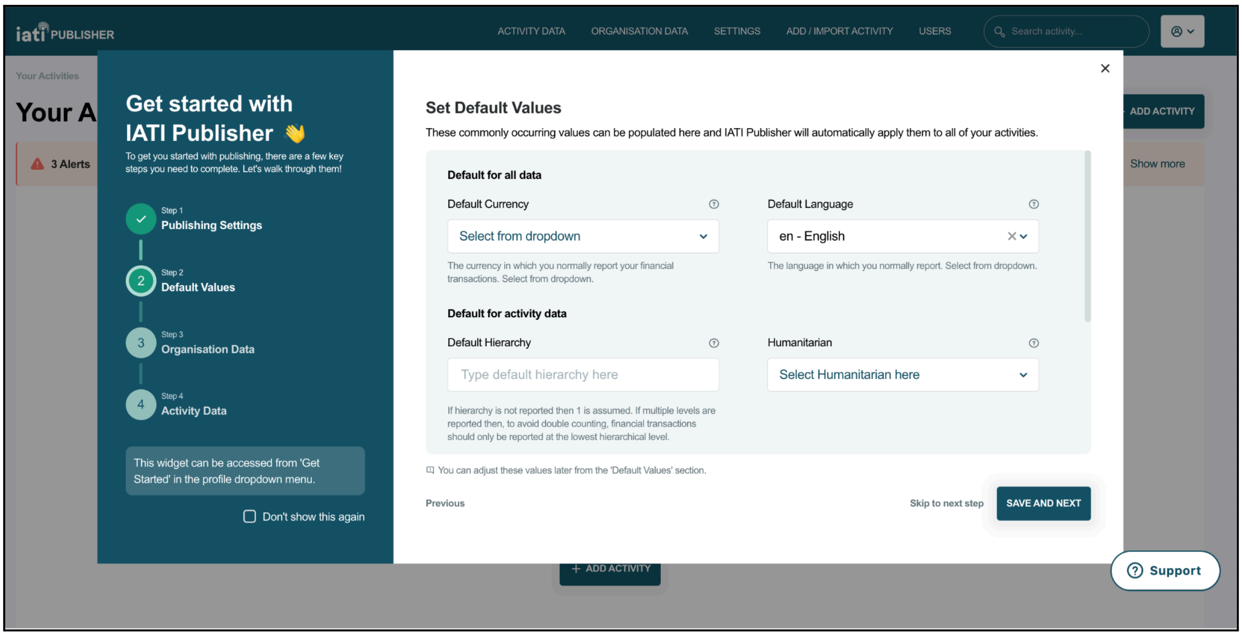
5. Once your API token is correct, click on “Save Publishing Setting” to save your information:



# What are default values and how do I populate them?

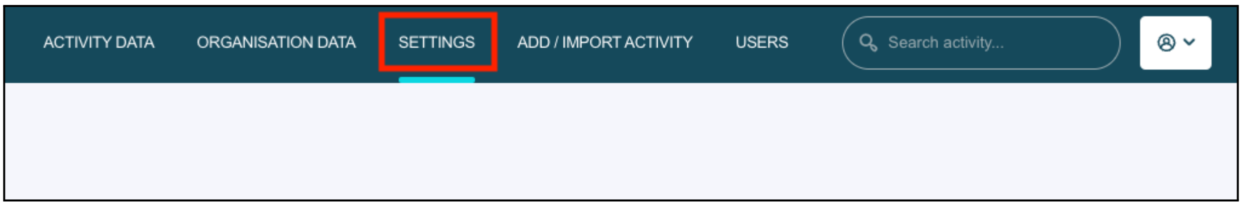
You can populate default values in IATI Publisher's settings so that the information is automatically applied elsewhere in your data. We strongly recommend that you populate your default language and currency. There are other recommended default values that are often required by different [donor governments' IATI requirements](#).

You will be prompted to complete default values in Step 2 of the "Get Started" guide:

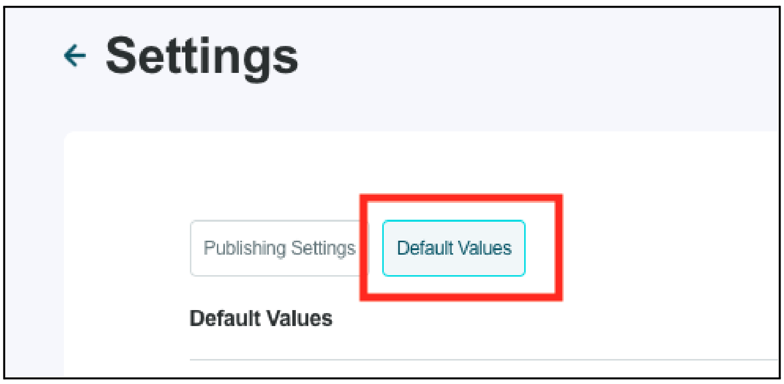



To view or change default values from the IATI Publisher main menu:

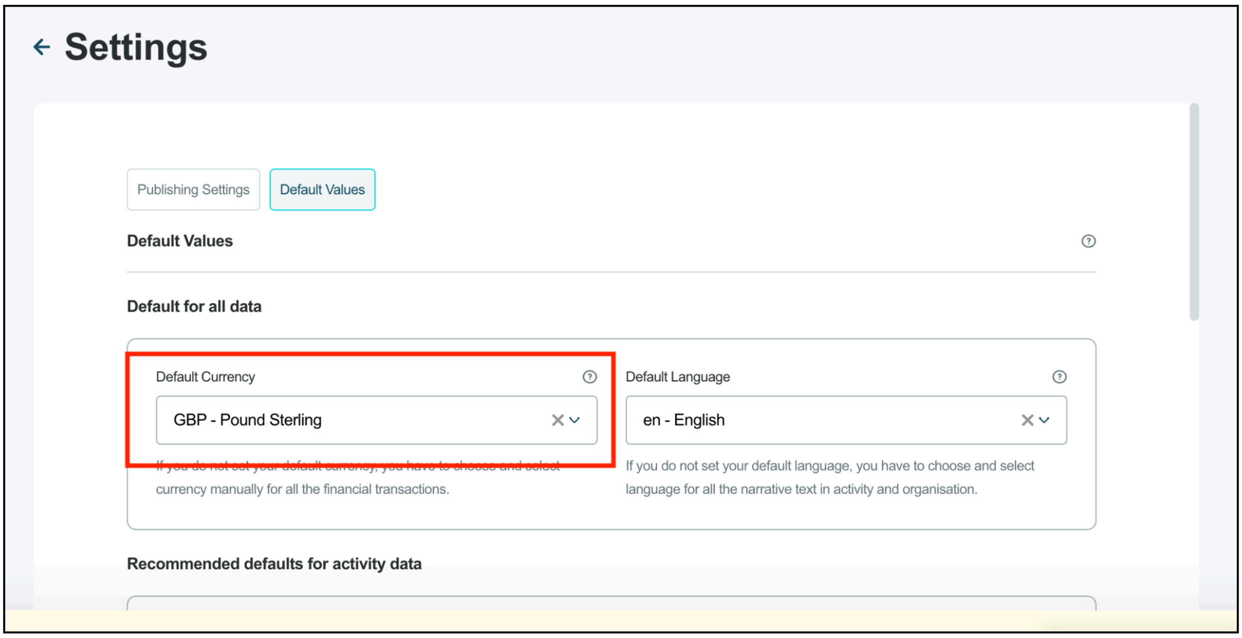
1. **Go to "Settings" in the main menu:**




2. **Select "Default Values":**

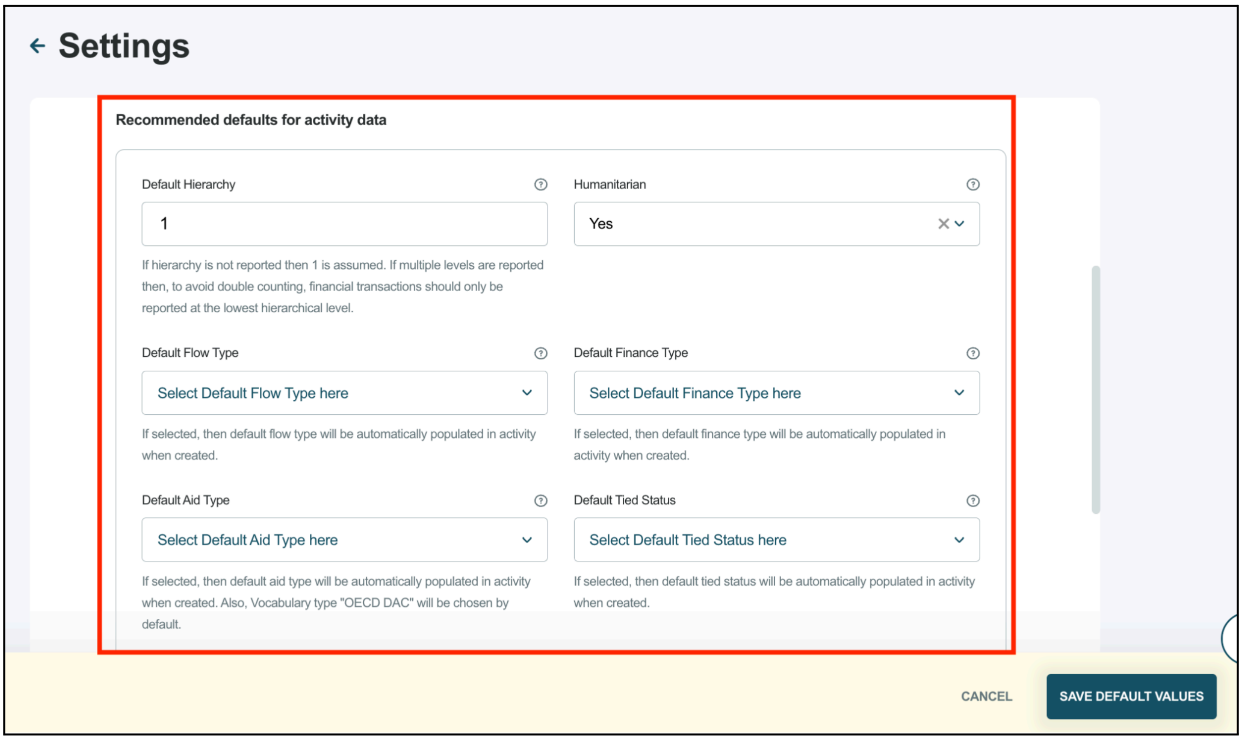


3. **Populate default currency and check your default language:**

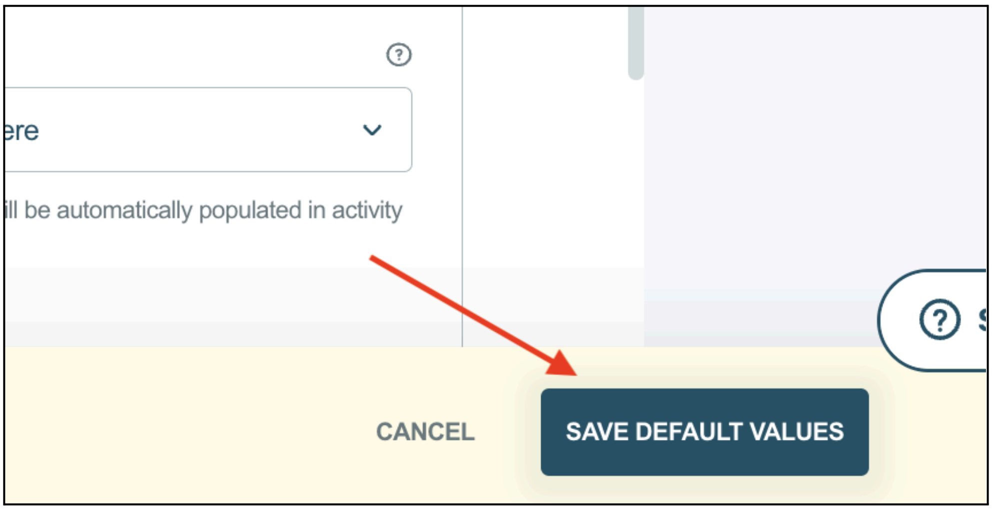



4. **Populate "recommended defaults for activity data":**

These fields are commonly required by funders, who may provide specific advice on how to complete them. Use the question mark icons to view more information on each field:

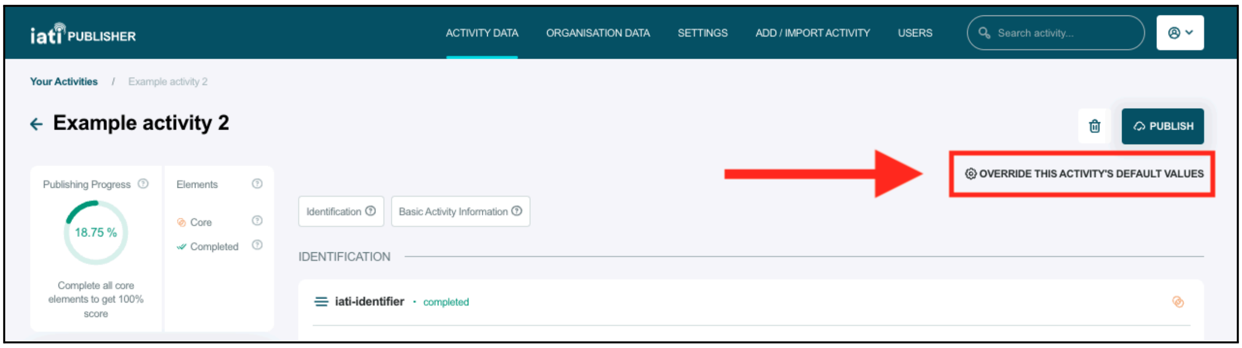


5. **Click "Save Default Values" to save your information**




The default values you have entered will be automatically applied to any activities that you create in IATI Publisher.

You can change these values for an individual activity by clicking "Override this activity's default values" in the top right of the activity detail screen:



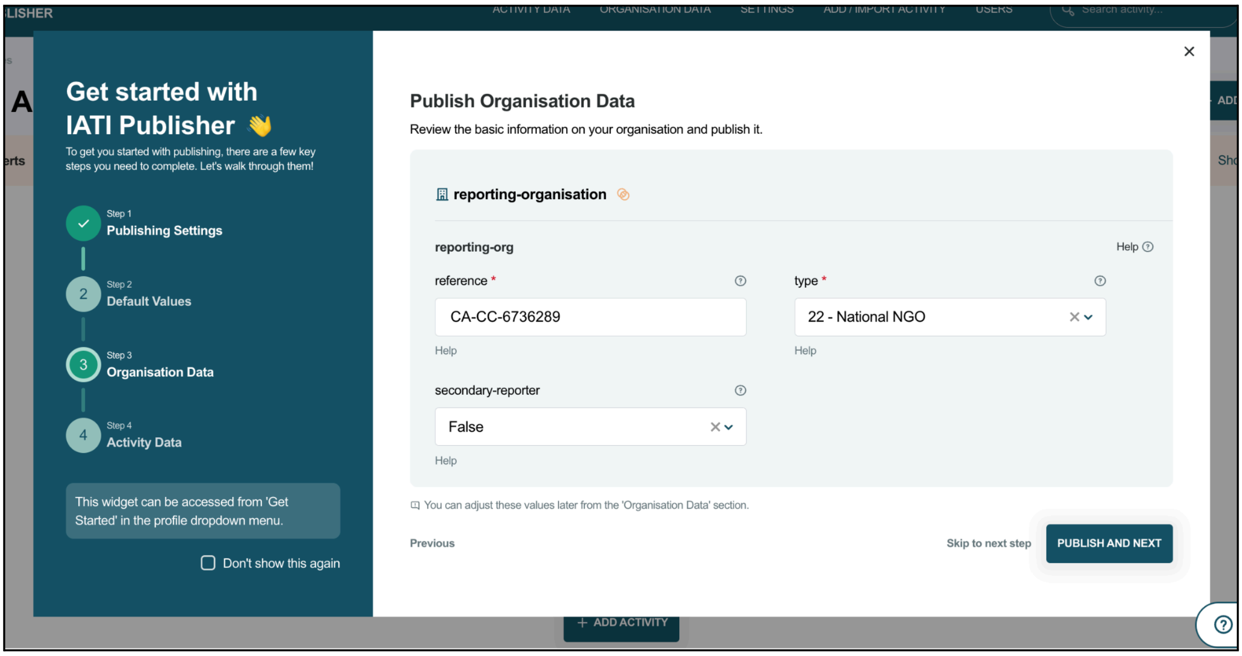
# Organisation data

## How do I enter organisation data?

The IATI data standard includes two types of data file - organisation and activity. The organisation data includes information such as your organisation's unique identifier, future-looking budgets, total expenditure and links to reports or strategy documents.

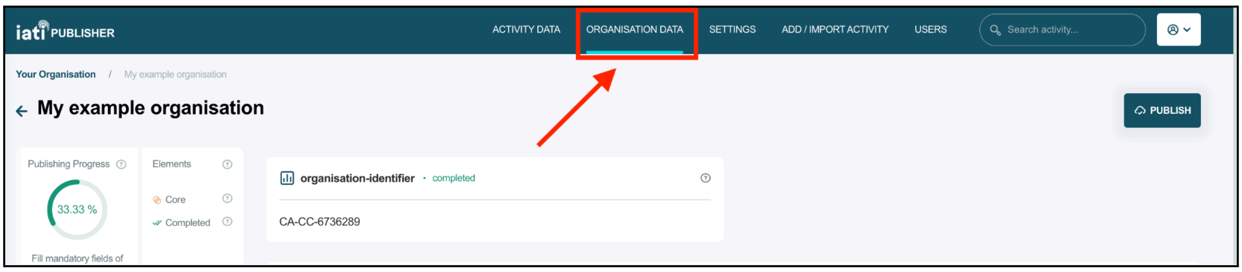
In IATI Publisher, you must publish organisation data before you can publish activity data. You can start with the basic ("core") elements and add more information over time.

You will be prompted to review and publish organisation data in the "Get Started" guide:



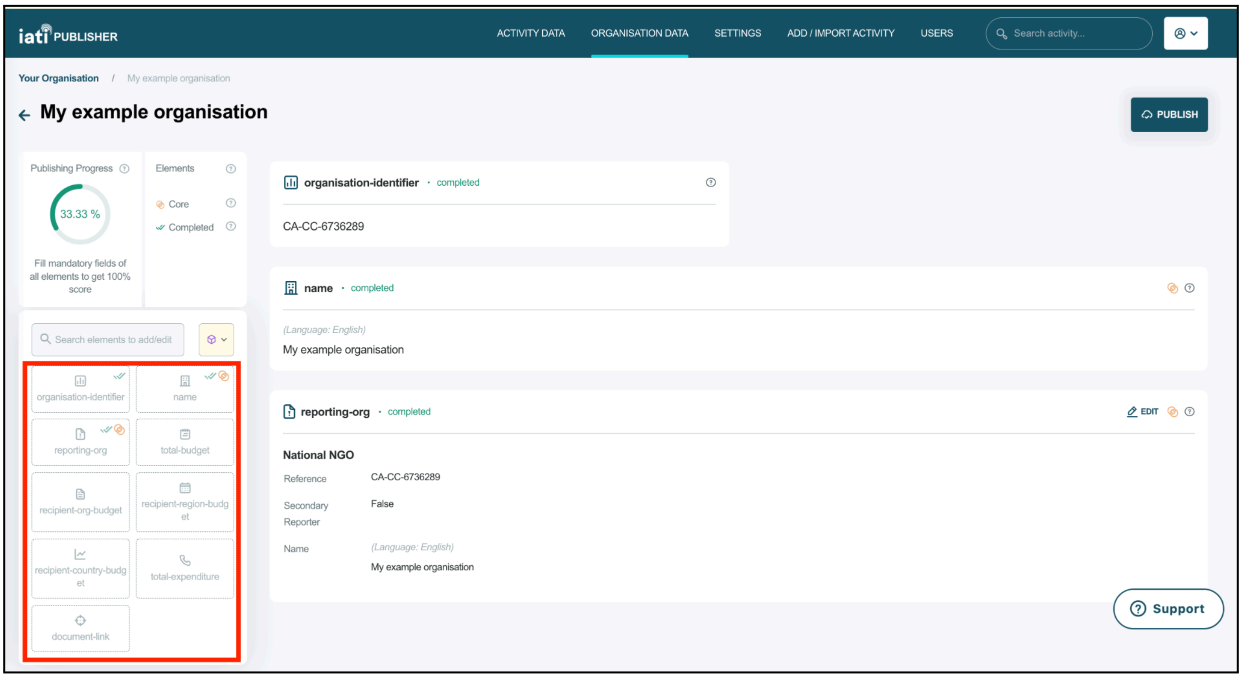

To view or edit organisation data from the IATI Publisher main menu:

1. **Click on "Organisation Data" in the main menu:**



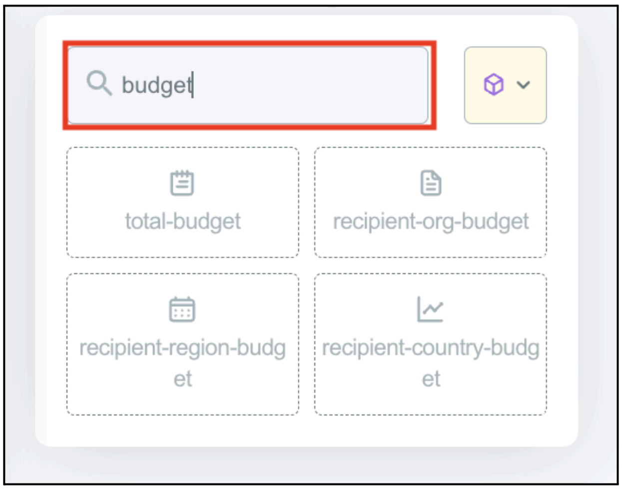
## 2. Select a data element to edit

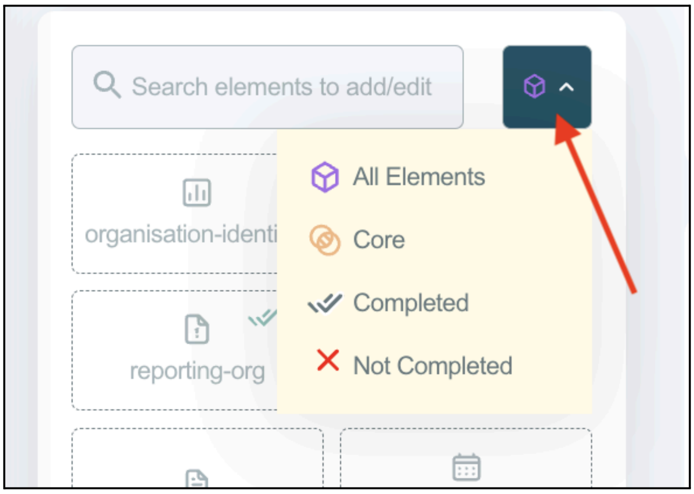
You can see a list of IATI elements in the left-hand menu on the Organisation Data page:



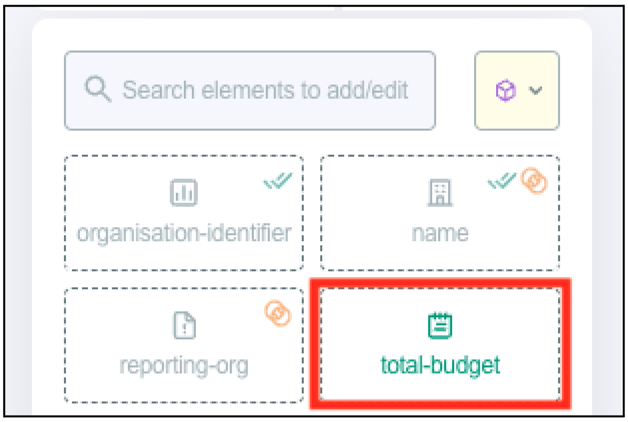

Some of these data elements are mandatory to populate and are labelled “core” (with a yellow ring symbol). Other elements are optional and can be populated if relevant.

You can search elements by name or filter on completion status:

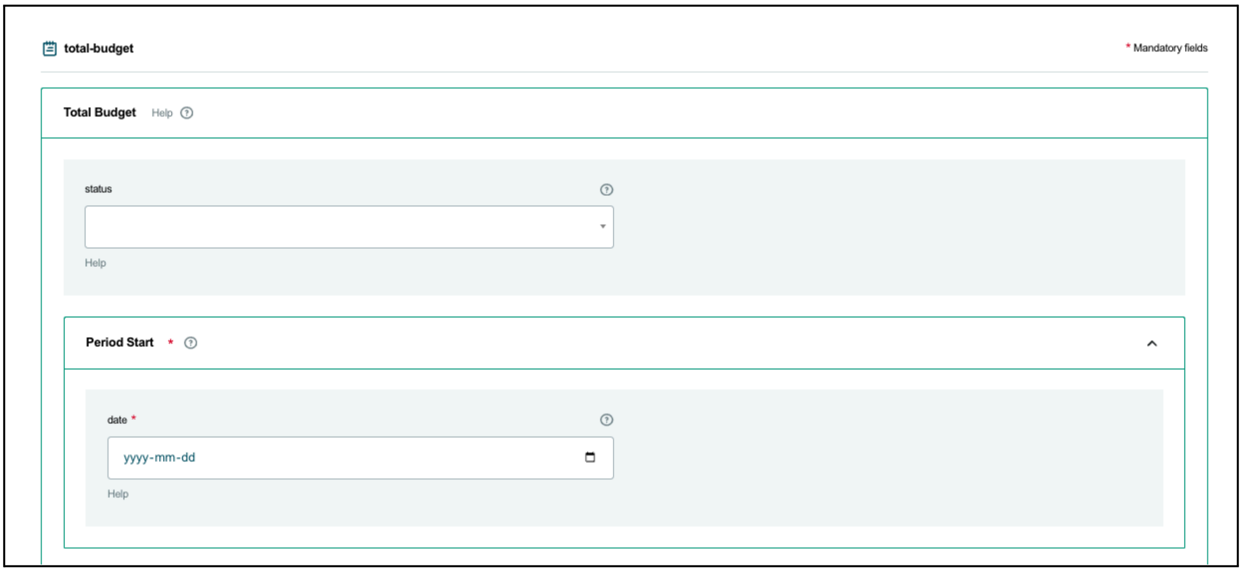


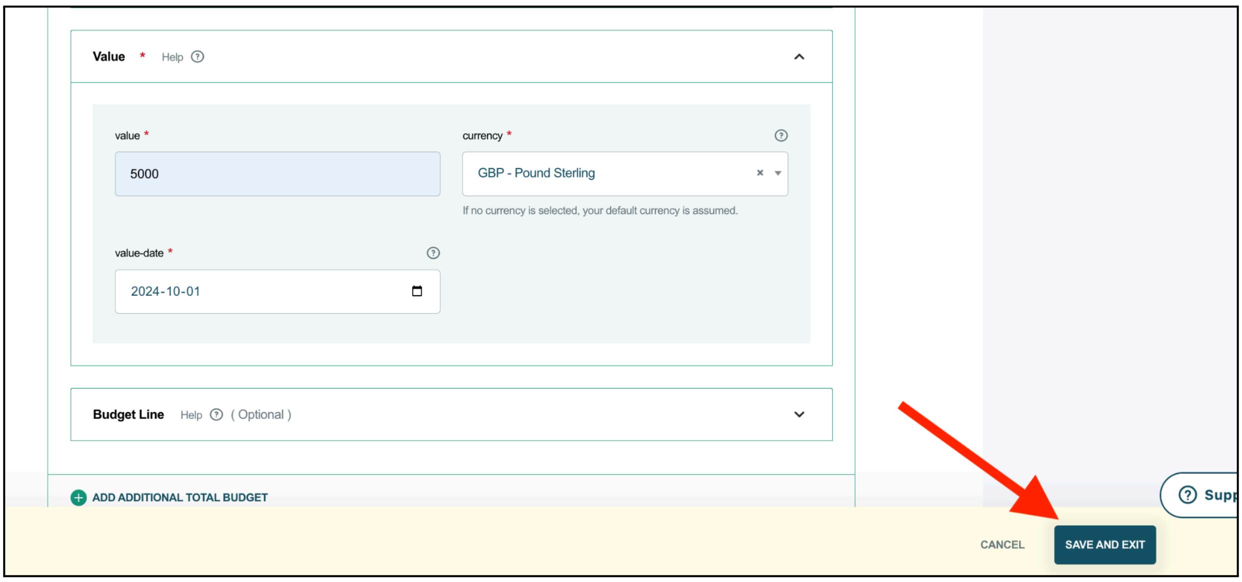
3. Click on an element in the menu to add or edit its data:



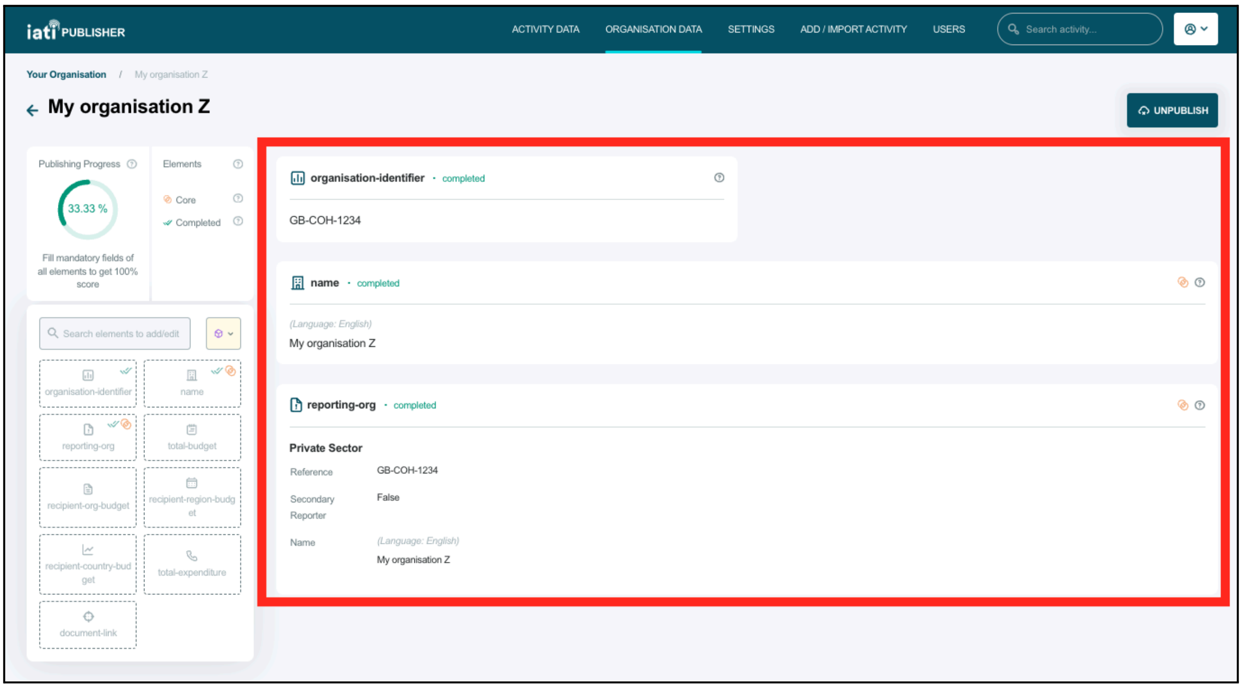

4. Complete the data entry form:



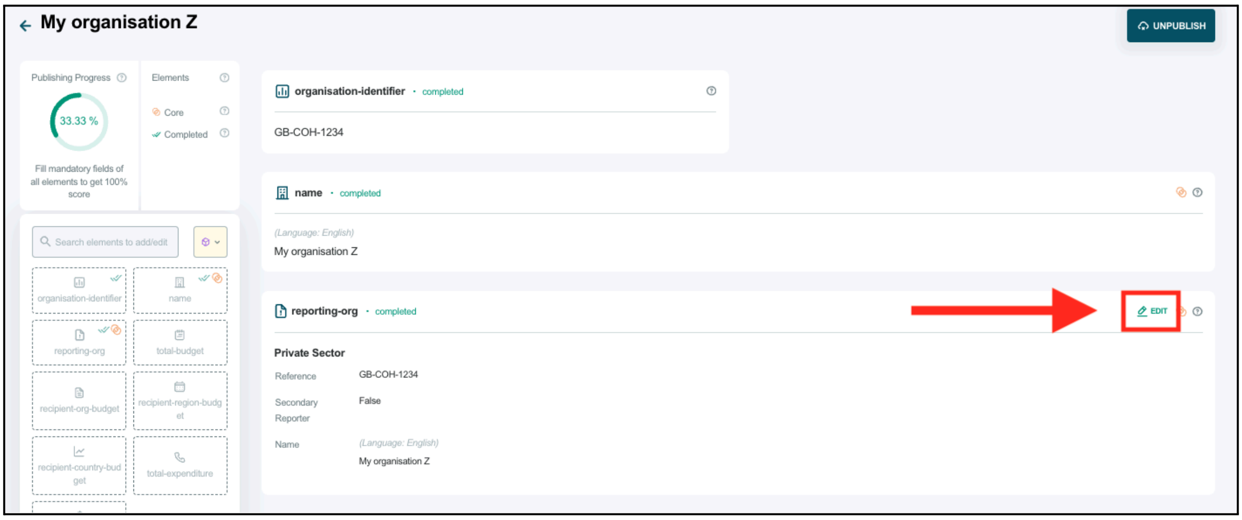

5. Click “Save and Exit” at the bottom of the page to save changes:



Data that you have already entered will be displayed in the centre of the screen:



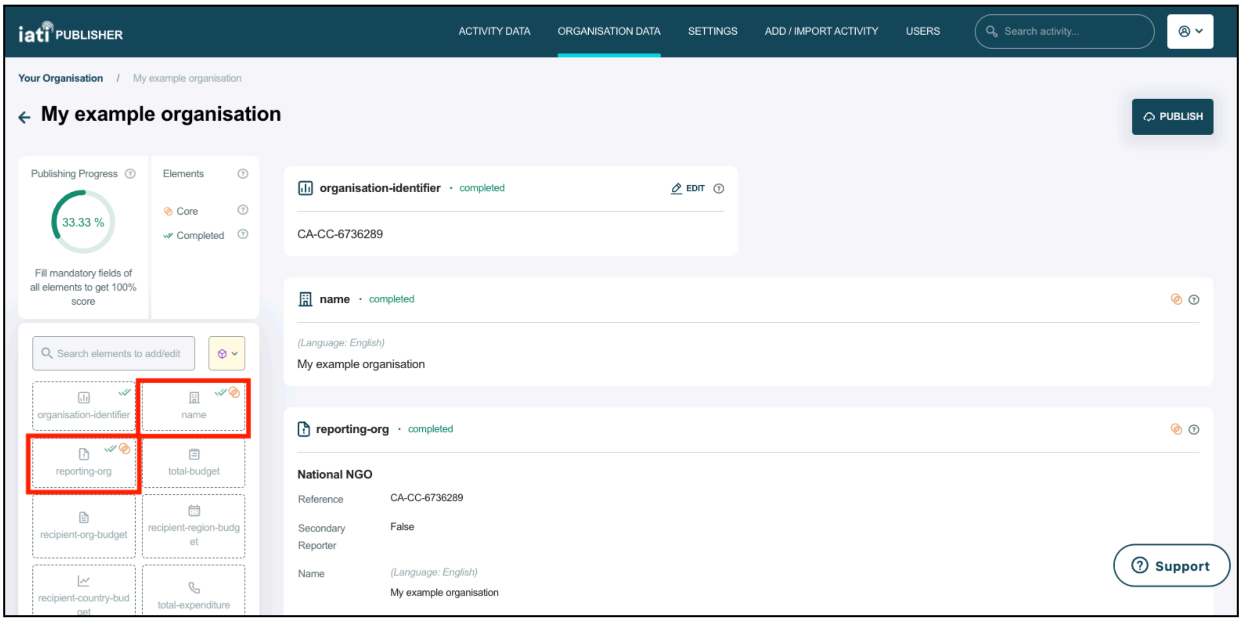

To edit an element in this list, click the “Edit” icon to the right of the relevant section:



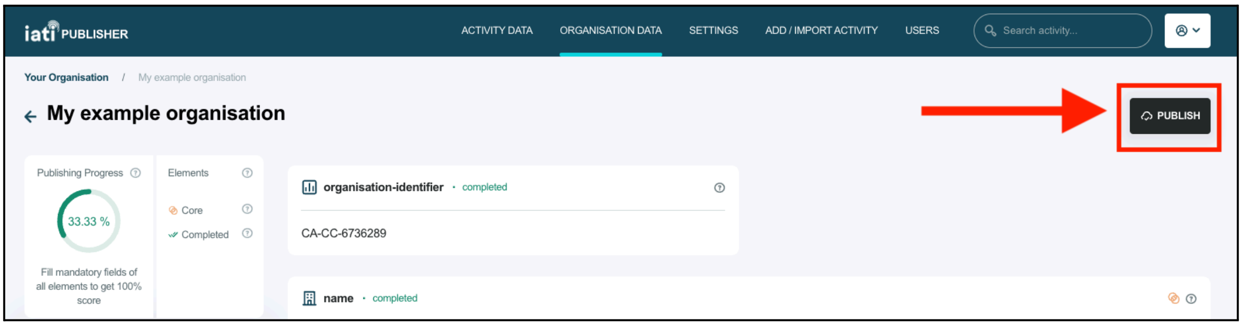
# How do I publish organisation data?

You need to publish organisation data in IATI Publisher before you can publish activity data. Once published, you can edit, add to and republish your organisation data at any time.

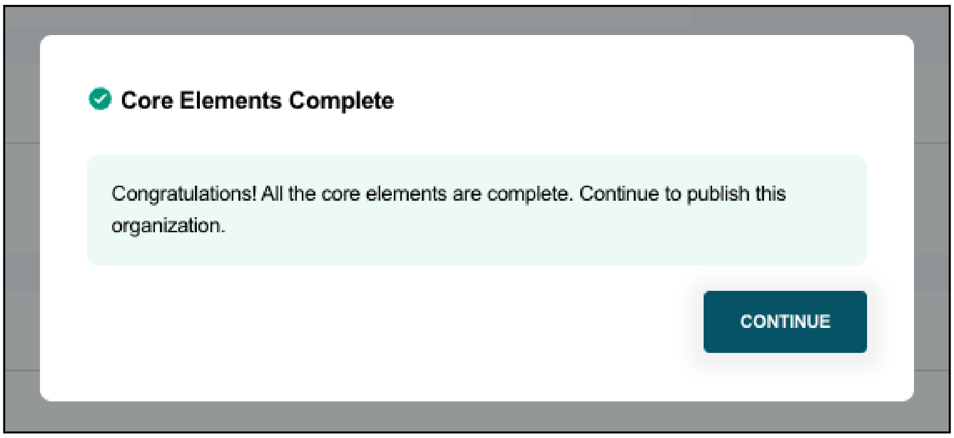
1. **Ensure that core elements have been completed on the [Organisation Data](#) page:**



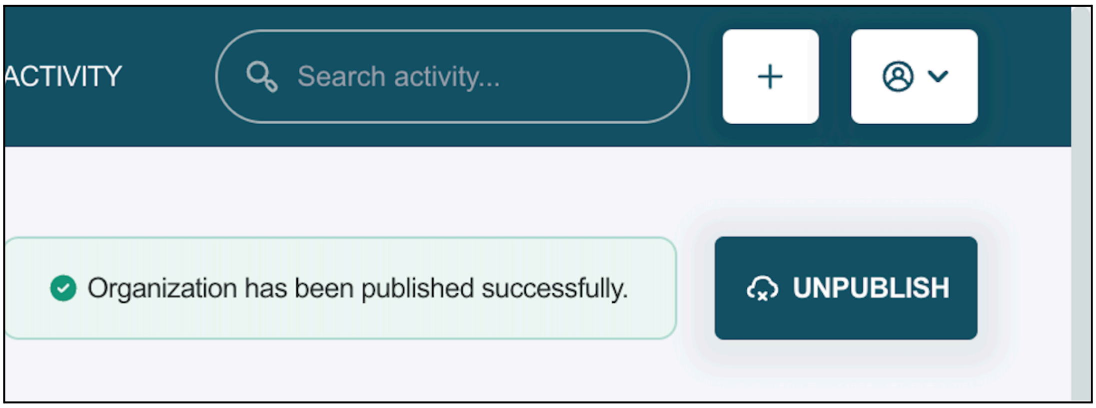

2. **Click "Publish" in the top right of the screen:**



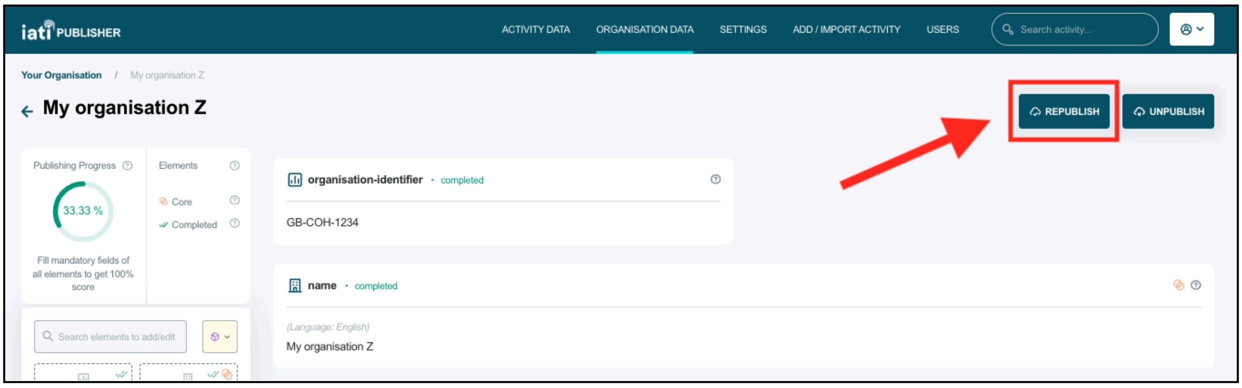

3. **Click "Continue" after core element completeness has been checked:**



4. **Publication of your organisation data will be confirmed:**




You can edit information on the Organisation Data page at any time to update what you have published. After any changes, you will see the option to “Republish” in the top right:



# Basic activity data

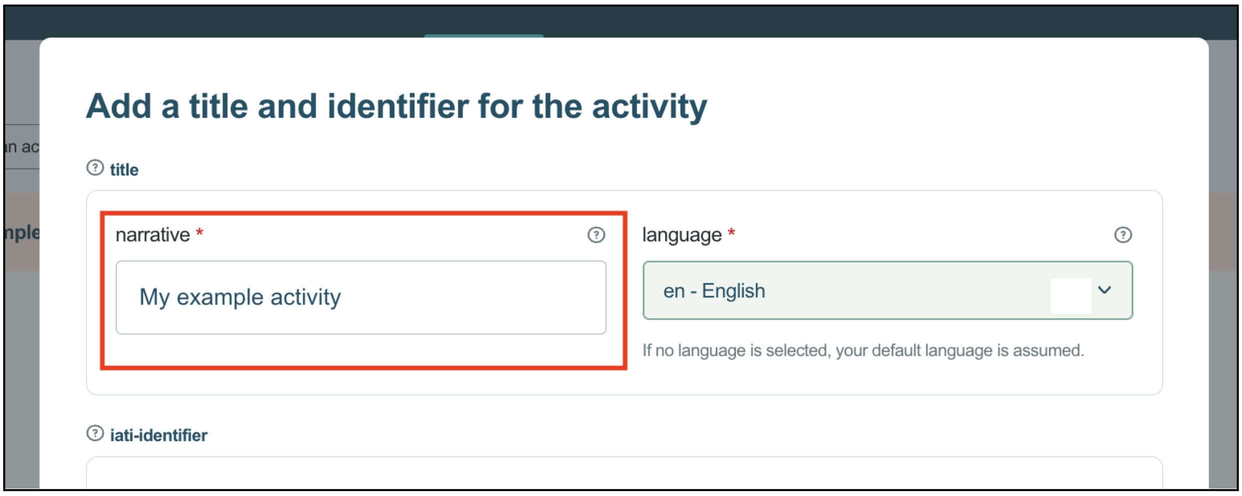
The second type of IATI data file is the activity file. This includes information on the activities that your organisation carries out, such as your projects or humanitarian interventions. The IATI Standard includes data fields on what the activity is, where it is taking place, which organisations are involved and how it is financed.

## How do I create a new activity?

You can create activities individually in the IATI Publisher interface and enter information via data entry forms. If you want to add multiple activities at once, see the section on bulk importing.

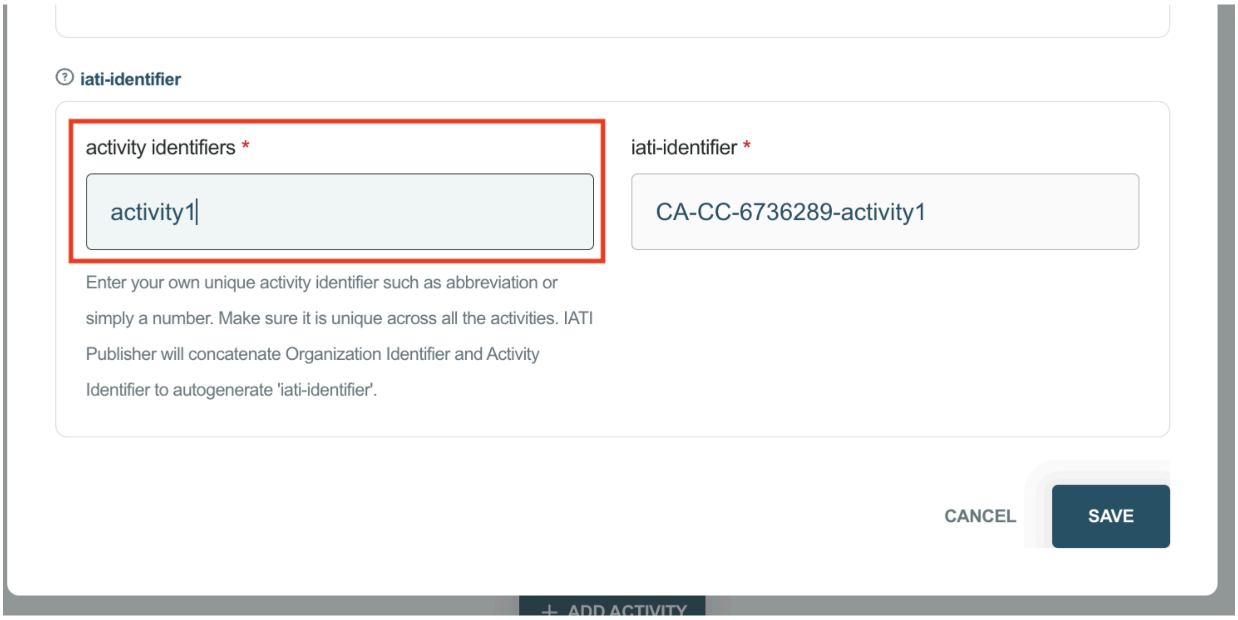
1. **Click "Add ⁄ Import Activity" in the main menu**
2. **Select "Add Activity Manually":**


3. **Enter a name for the activity in the title "narrative" field:**



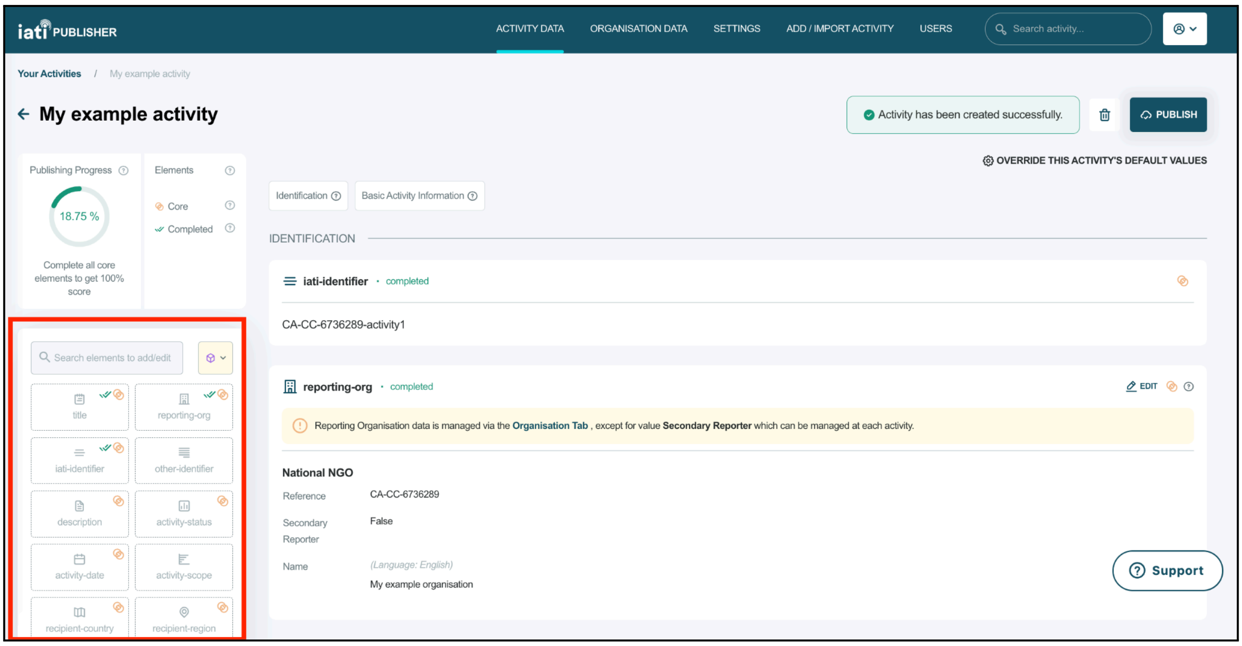
4. **Enter a unique identifier for the activity**

This will be combined with your unique organisation identifier to populate the field "iati-identifier".

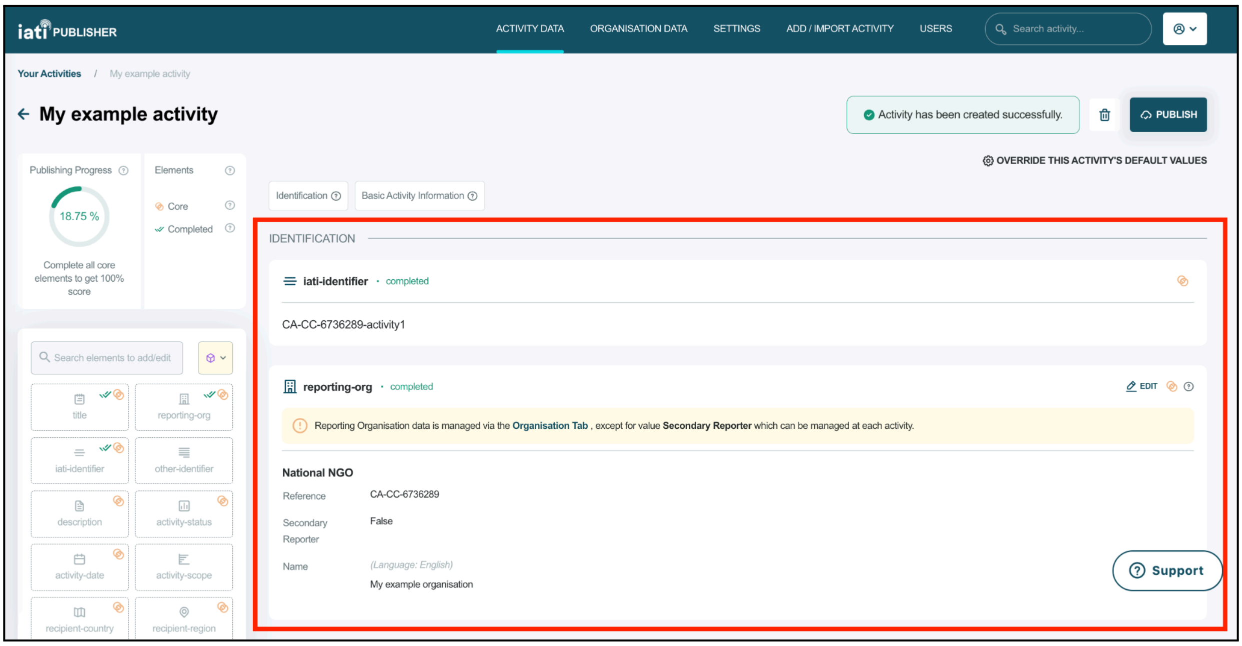



5. **Click "Save" in the bottom right corner**
6. **Add information to your activity**

You will see the overview screen for the activity that you have just created. IATI data elements are displayed in the left hand menu, representing different information that you can add about your activity.

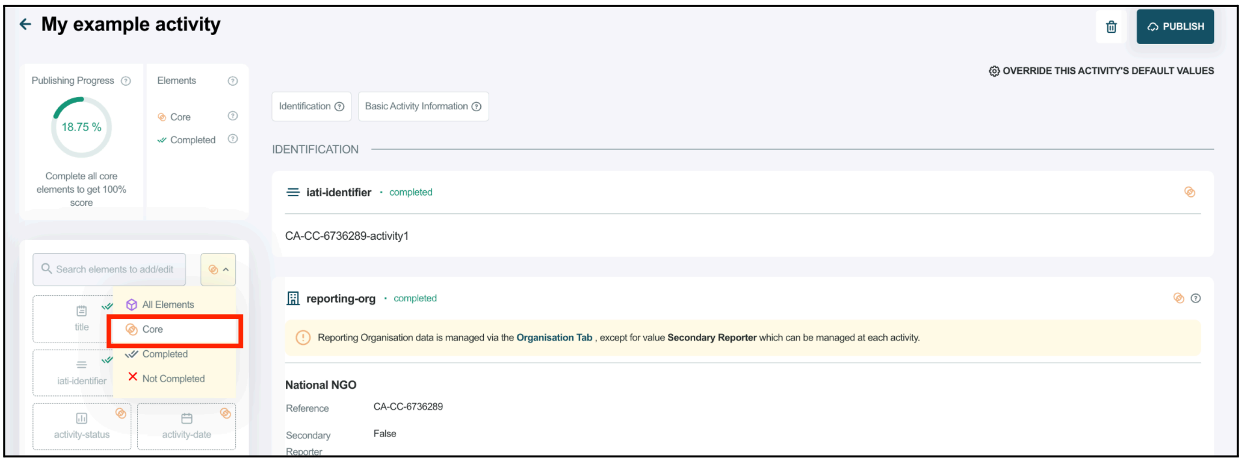


Information that has already been populated is shown in the centre of the screen:




# What are “core” elements and how do I complete them?

Some IATI data elements are labelled “core” and have a yellow ring symbol against them:

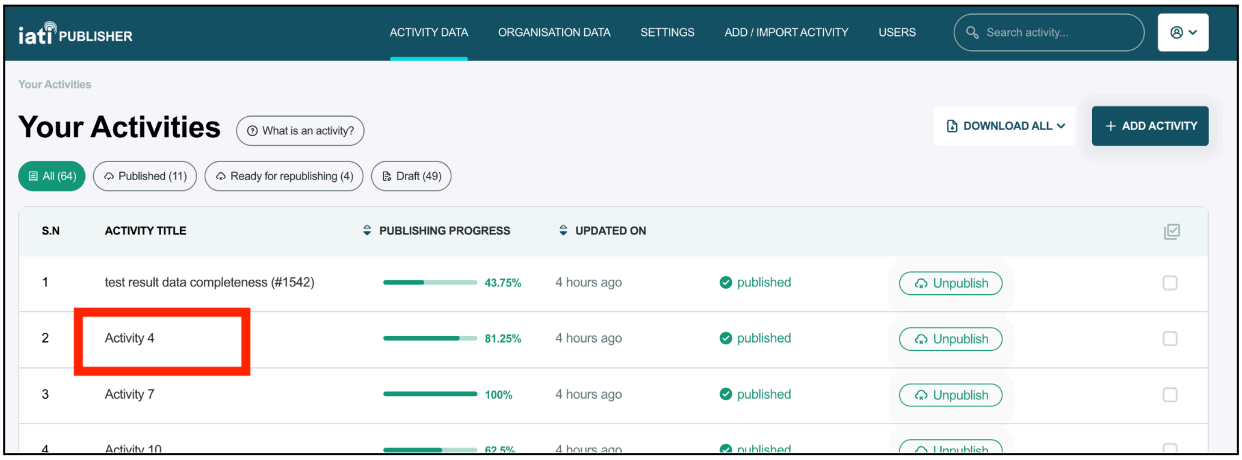



It is recommended that you complete “core” elements - they are either mandatory according to the IATI Standard or required by [donor governments’ IATI publishing requirements](#).

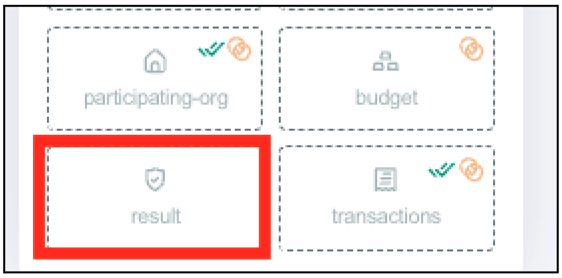
Other elements are optional - these may or may not be relevant to your organisation and can be populated or left blank.

# How do I edit an existing activity?

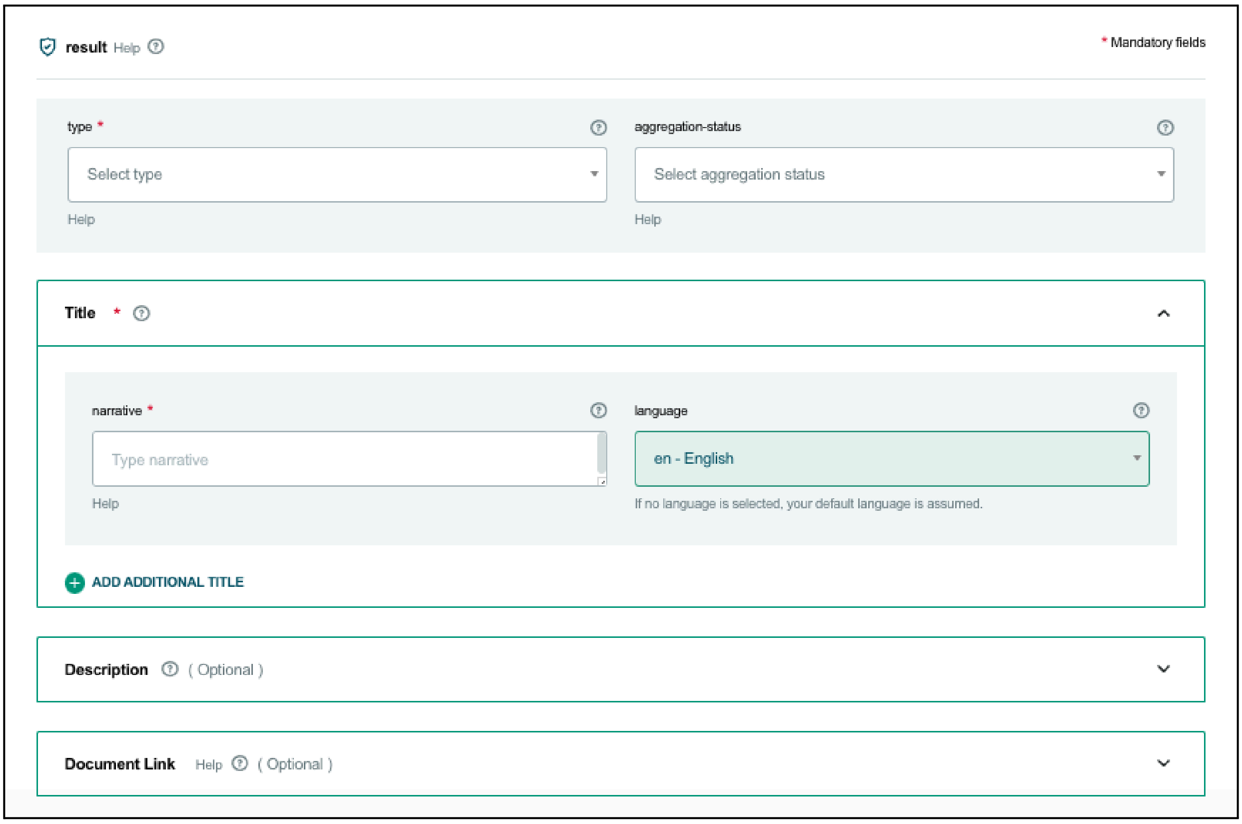
1. Click on the activity that you want to edit from the Activity Data list:




2. Click on a data element to add or edit it:

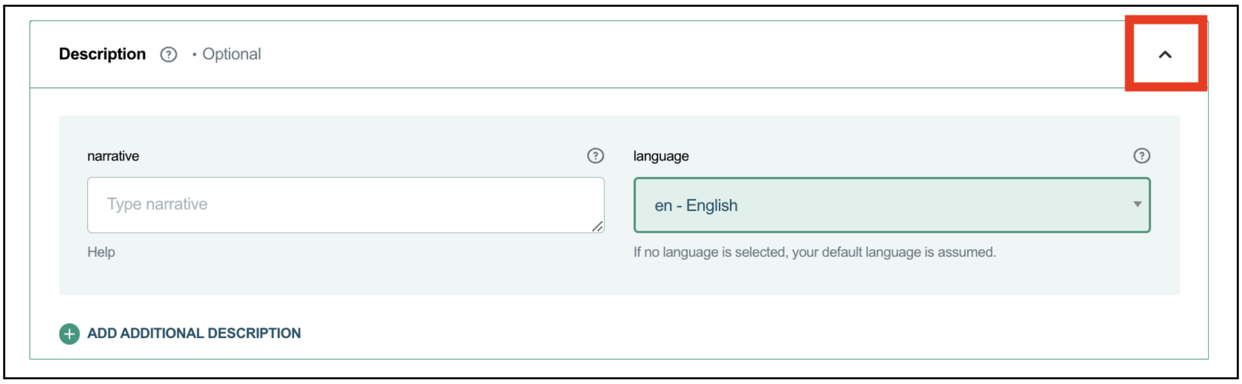



3. Complete the data entry form to populate the element:

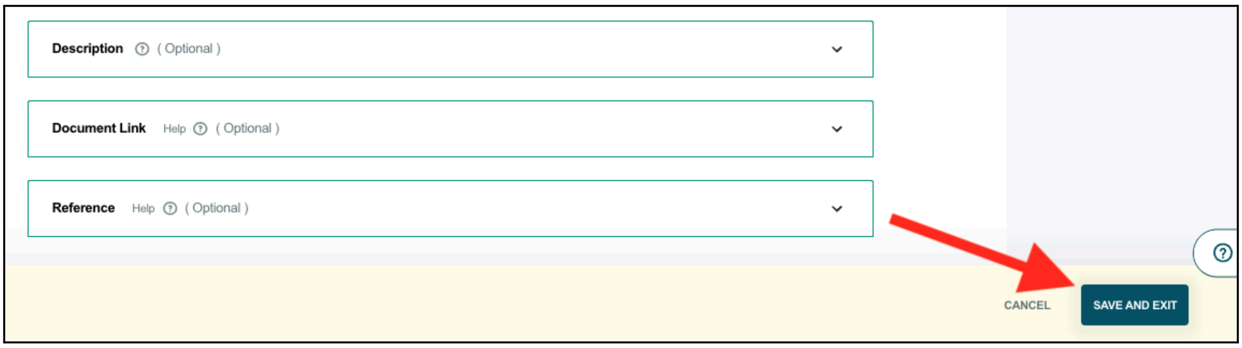


Mandatory fields are marked with a red asterisk and are displayed towards the top of IATI Publisher's data entry forms. These fields should always be populated to avoid errors in your published data.

Optional fields are displayed in collapsed format towards the bottom of data entry forms. Use the arrow icons to expand and collapse these sections as needed:



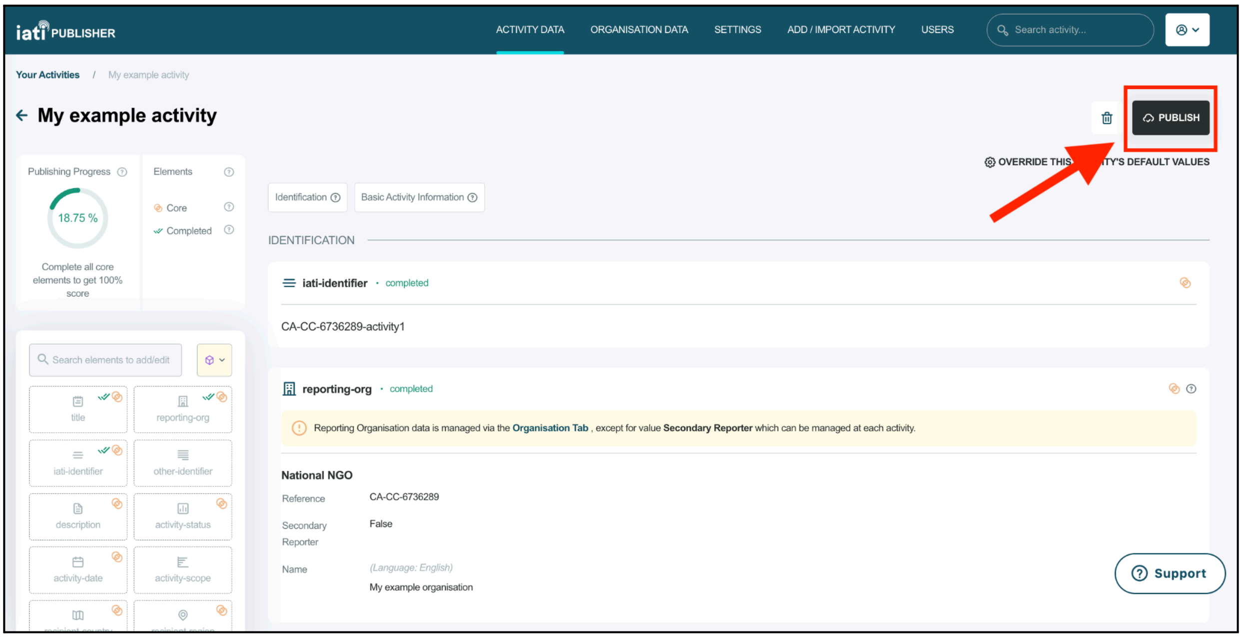

4. **Click "Save and Exit" to return to the activity detail screen**



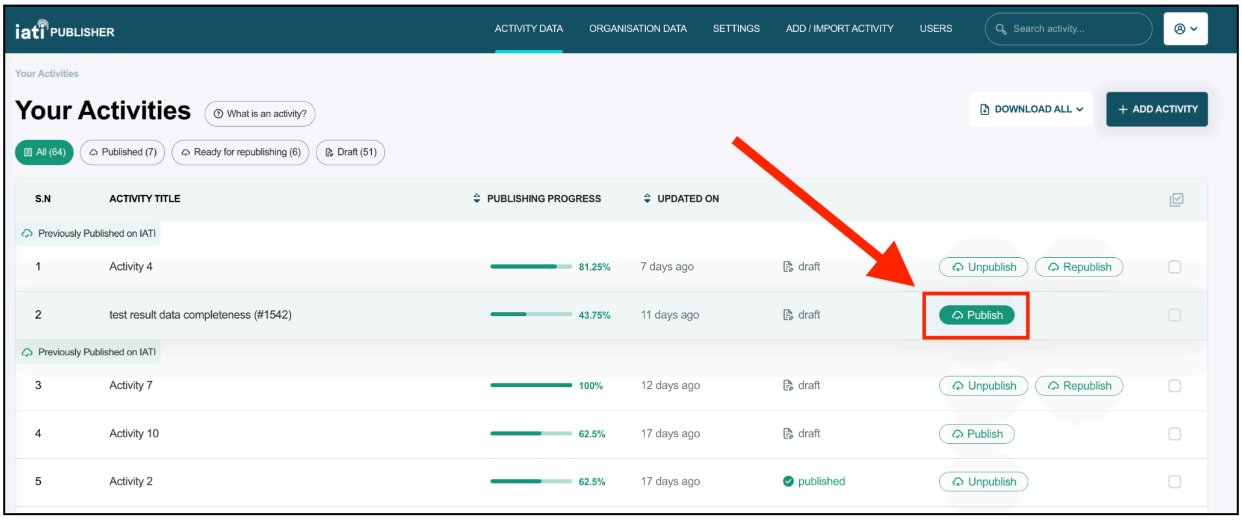
# How do I publish an activity?

There are three different ways to publish an activity. If the activity has been edited since it was published, you will see the option to “Republish”. Republishing is necessary to update your public data.

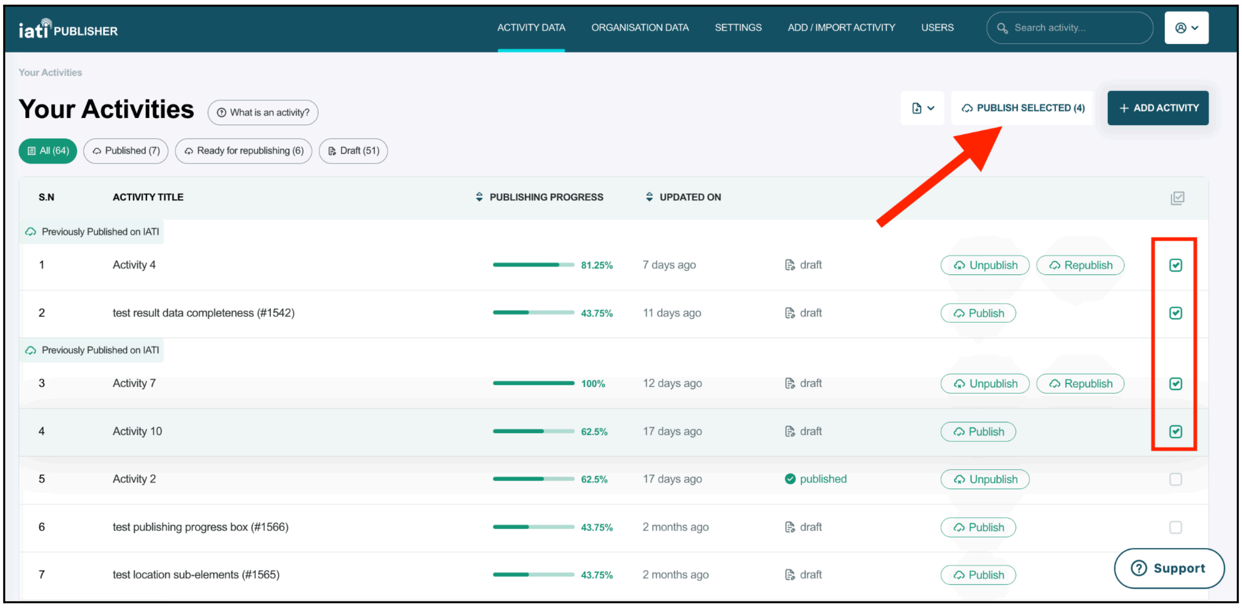
a) Click “Publish” from the detail page of an individual activity:



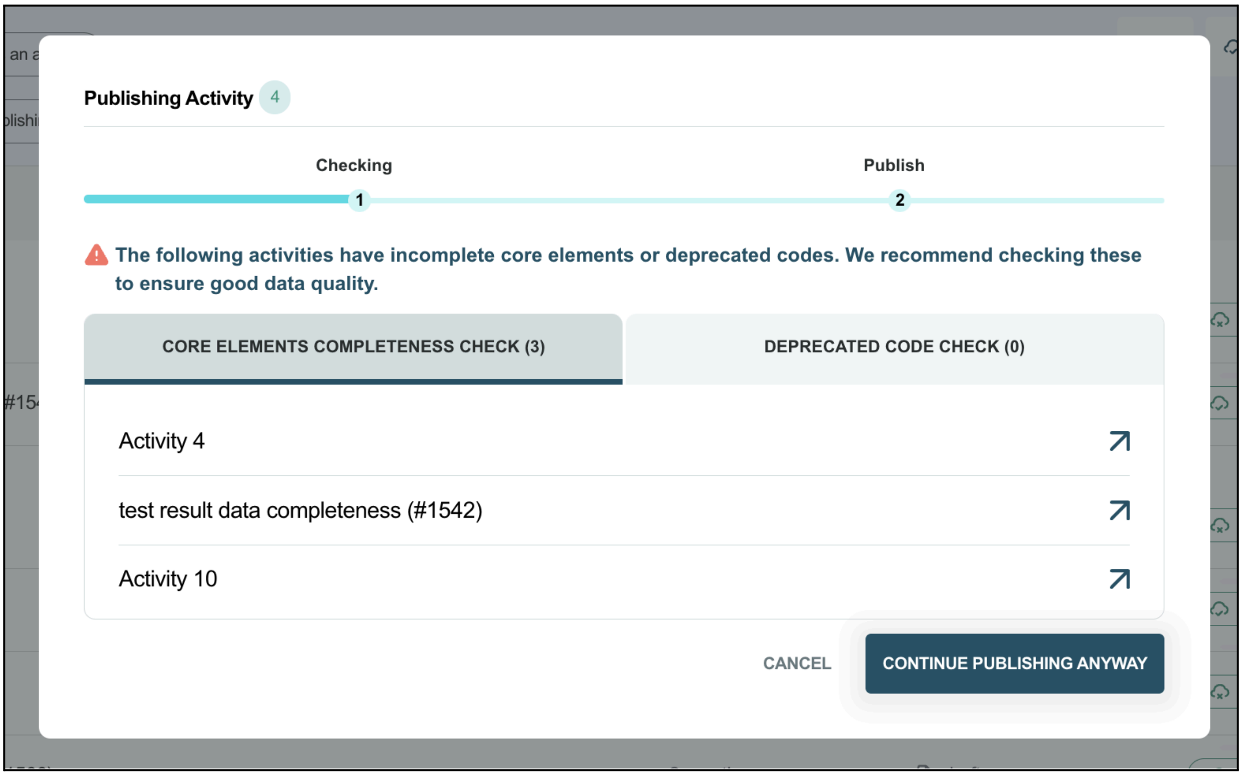

b) Click “Publish” for an activity in the activity list:



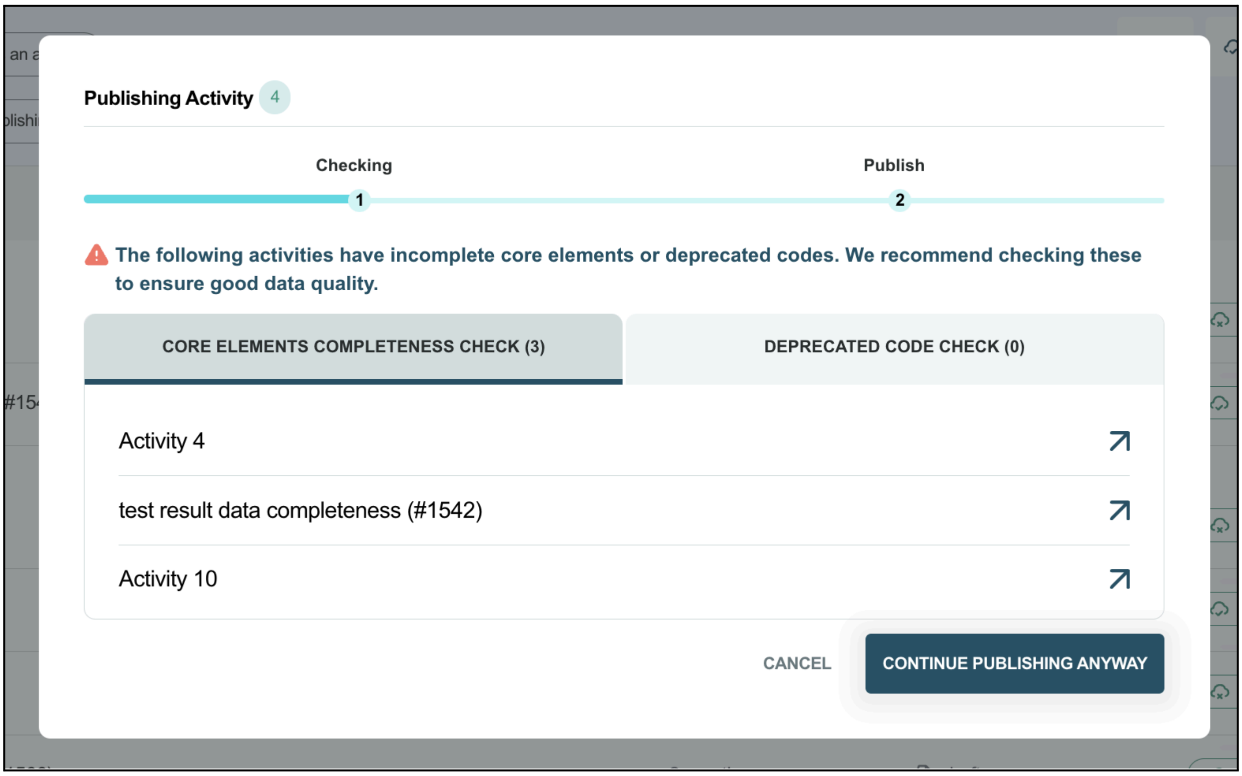
c) Select and publish multiple activities at once from the activity list:



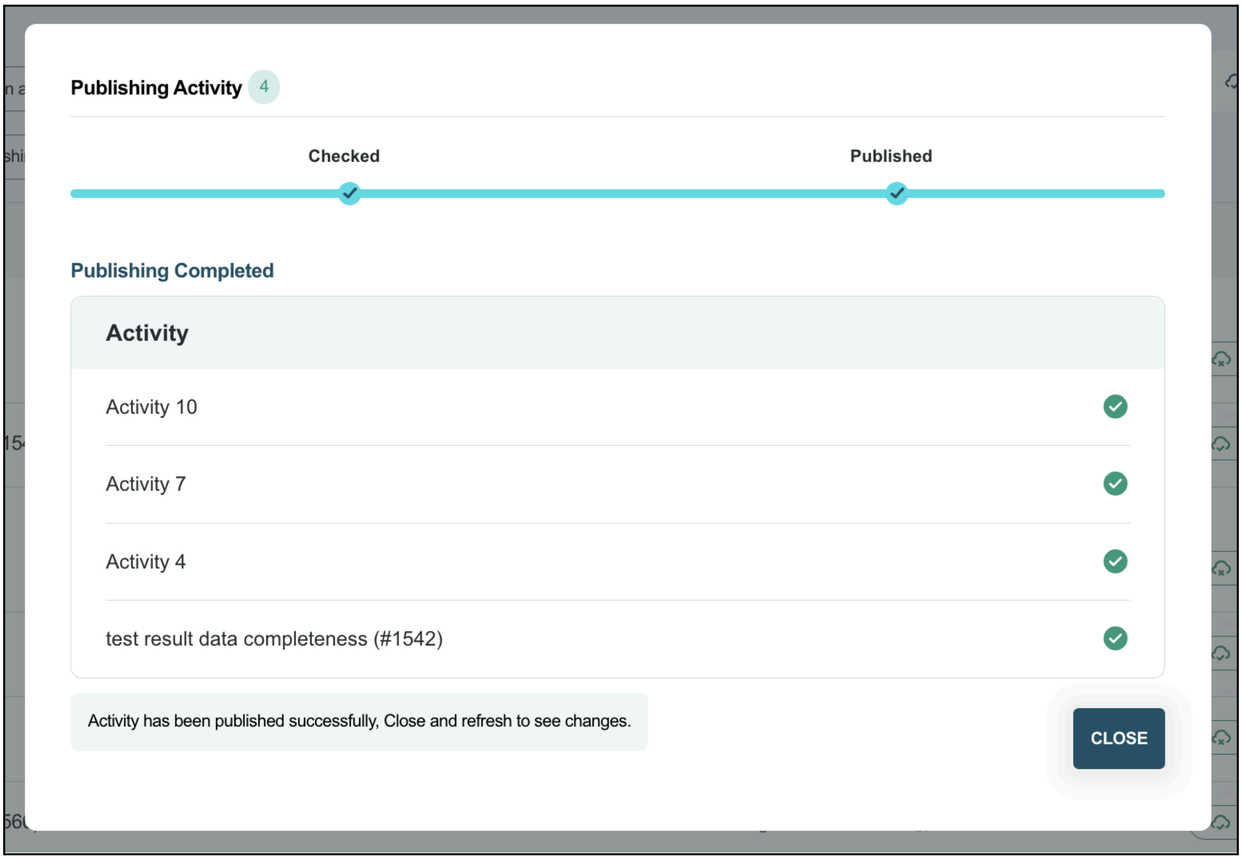

After clicking "publish", activity data will be checked before publishing. You will be notified if there are missing core elements or possible data quality issues with your data:



You can return to the activity detail page and edit data before returning to the publishing process. To continue publishing without making changes, click “Continue Publishing Anyway”:




You will receive confirmation when your activity data has been published:

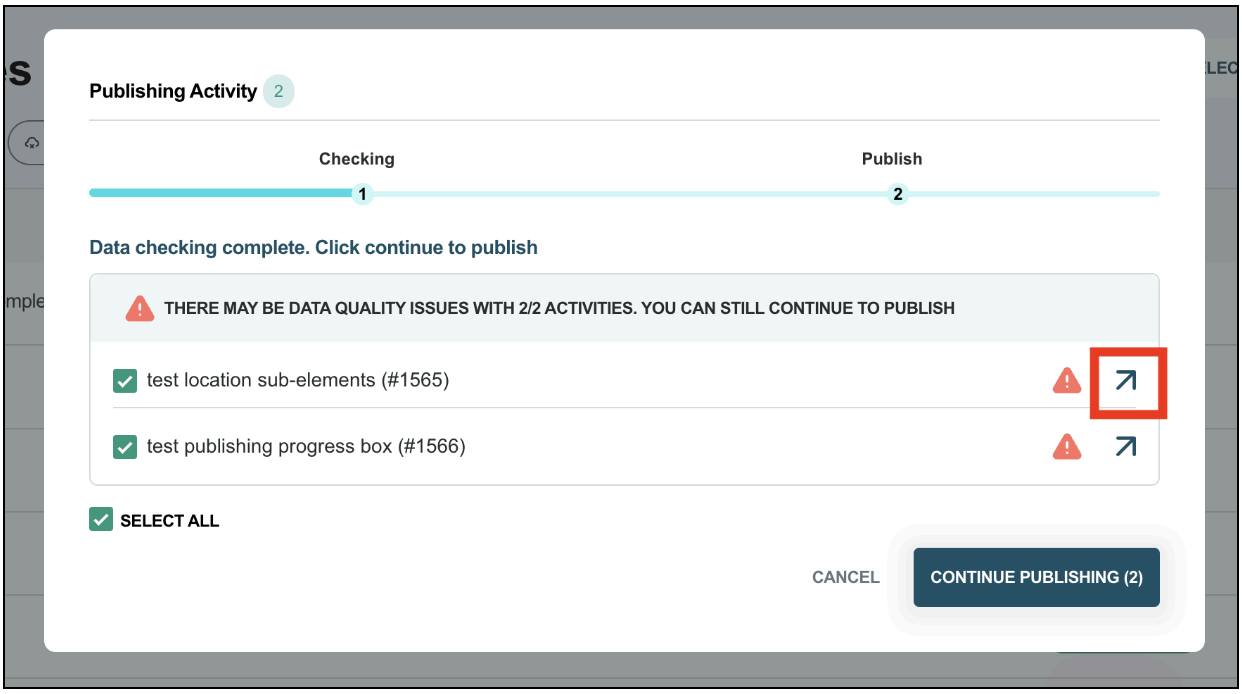


# How do I fix data quality issues?

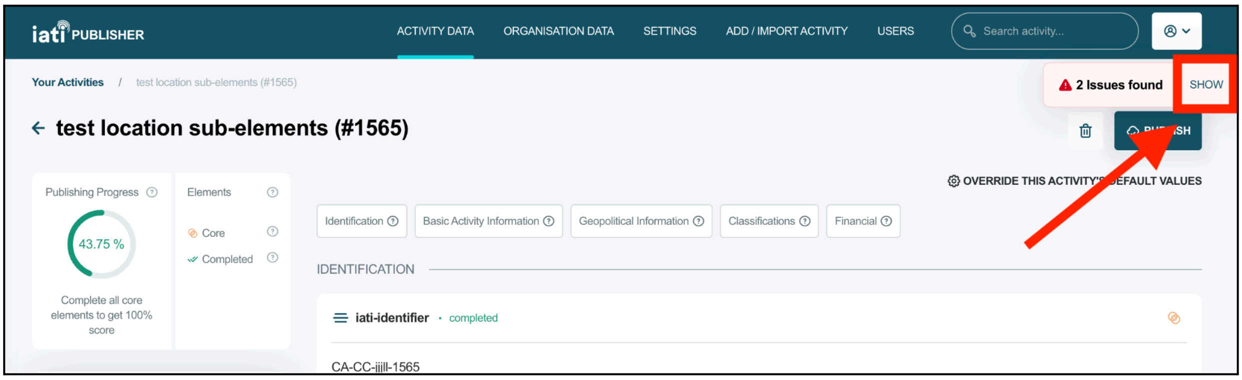
IATI Publisher checks your activity data against the [IATI Validator](#) before it is published. This feedback helps you correct issues and gaps in your data that may affect its usability.

Activities with possible data quality issues are highlighted at the checking stage of publication. Republishing your activity will rerun the data validation checks.

1. **Click on the arrow next to an activity to open it in a new window:**

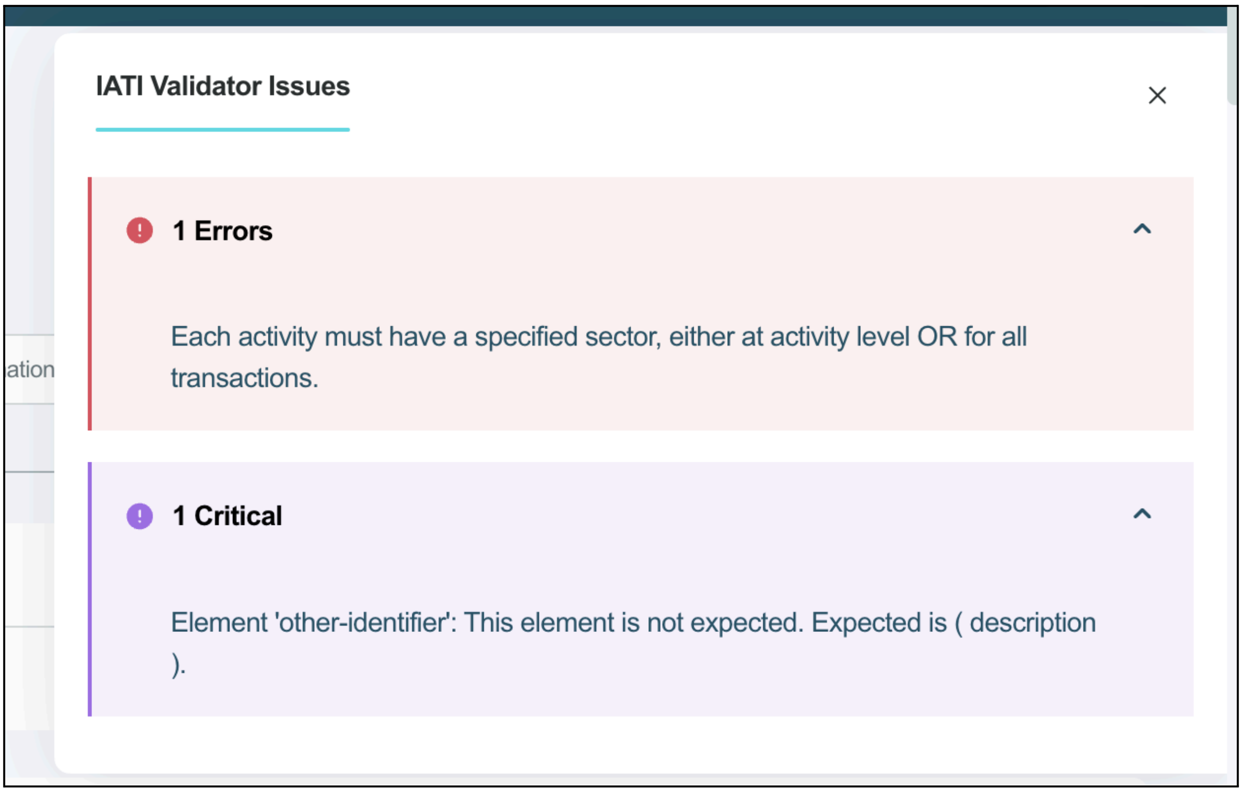



2. **Click "Show" in the top right to expand information on the data issues:**



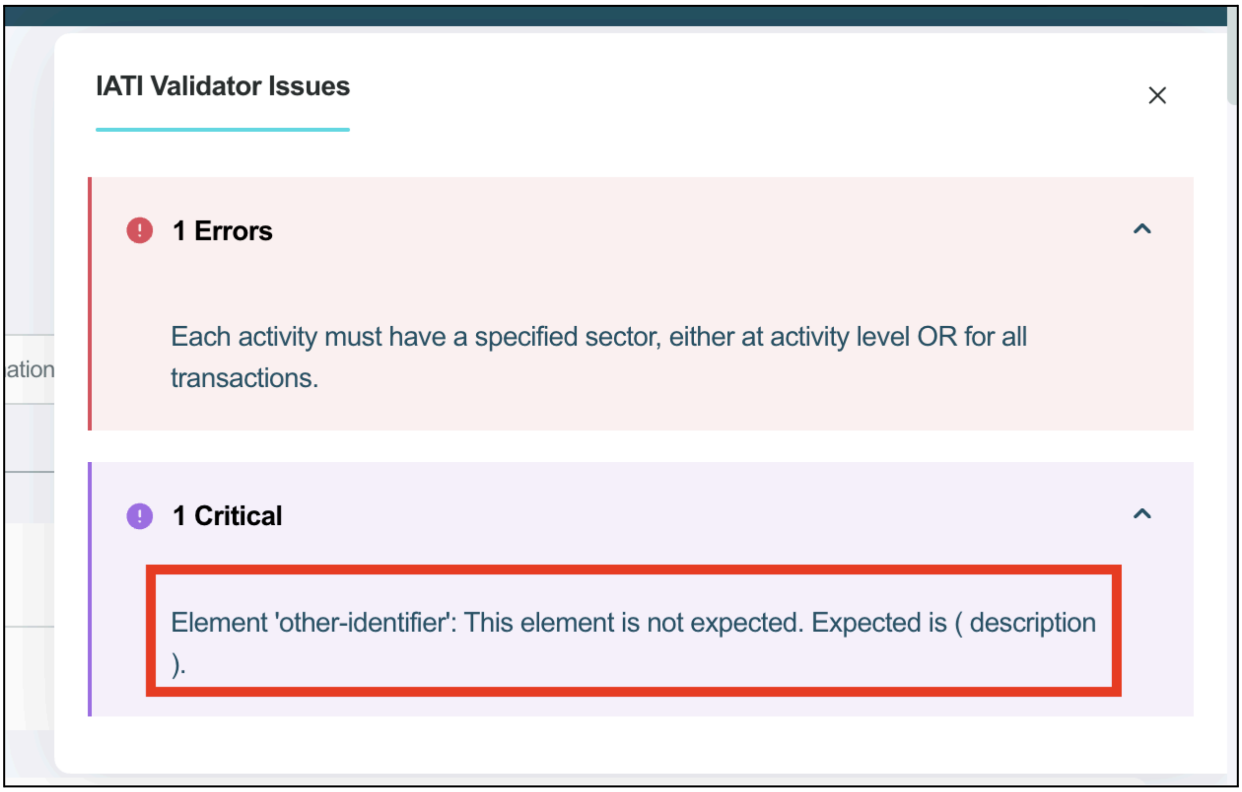
### 3. View details on individual error messages

Data quality issues are grouped by severity. Critical errors are the most important and should be solved first.




### 4. Click on the error message to go to the relevant data entry form

Where possible, IATI Publisher will take you to the data entry form or section where the error is. This will help you fix missing mandatory fields or invalid data.



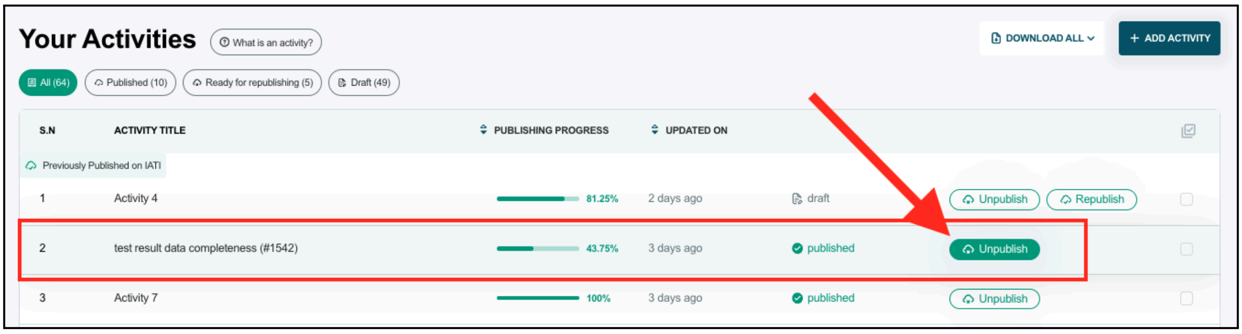
# How do I unpublish or delete an activity?

Once published, IATI activities should remain public even after they have finished. You can update and republish your activity data as often as needed, for example to update budgets or end dates.

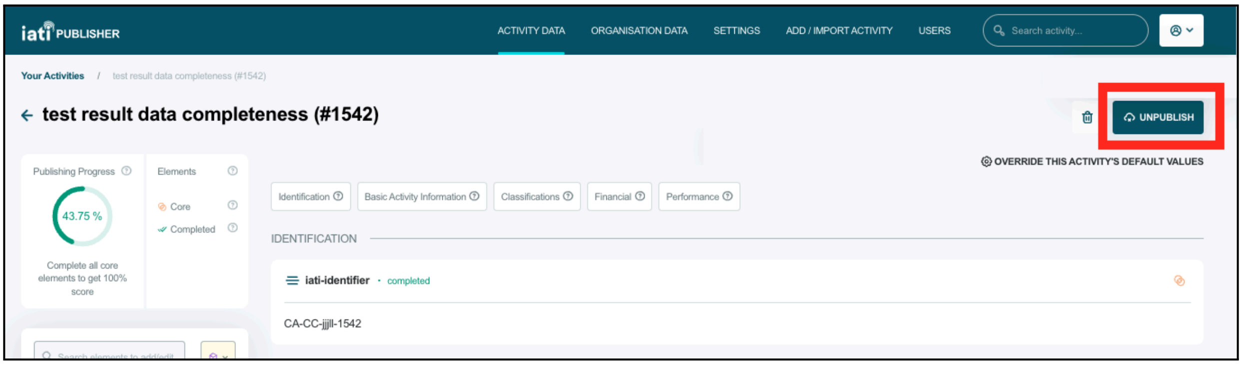
In some cases, however, activity data needs to be removed from public view. To do this, you can "unpublish" your activity in IATI Publisher.

1. **Click "Unpublish" against the activity you want to remove**

You can unpublish an activity from the activity list page:

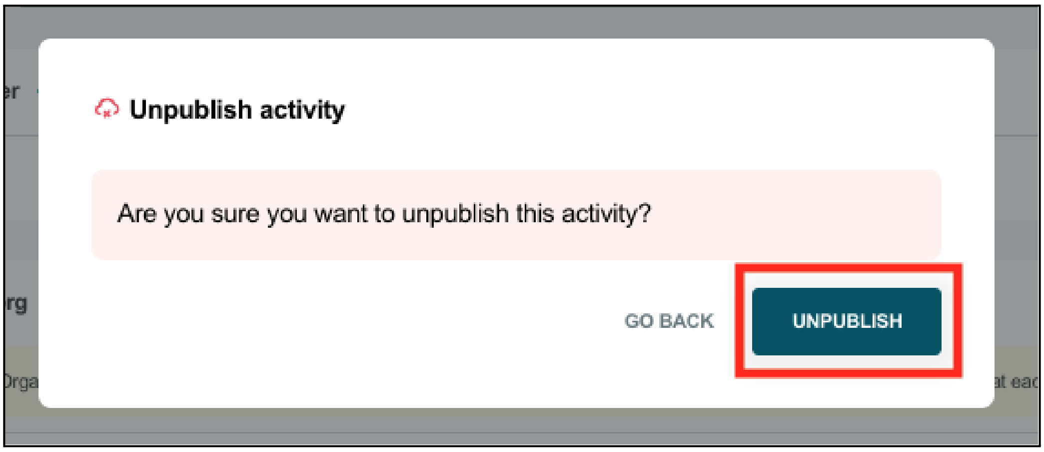



Alternatively, you can click unpublish from the activity detail page:

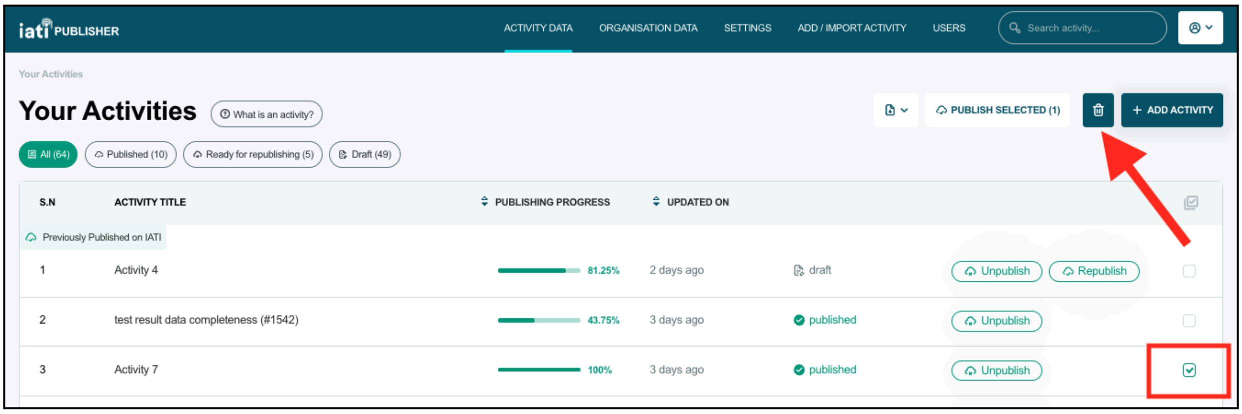


2. **Click to confirm that you want to unpublish**

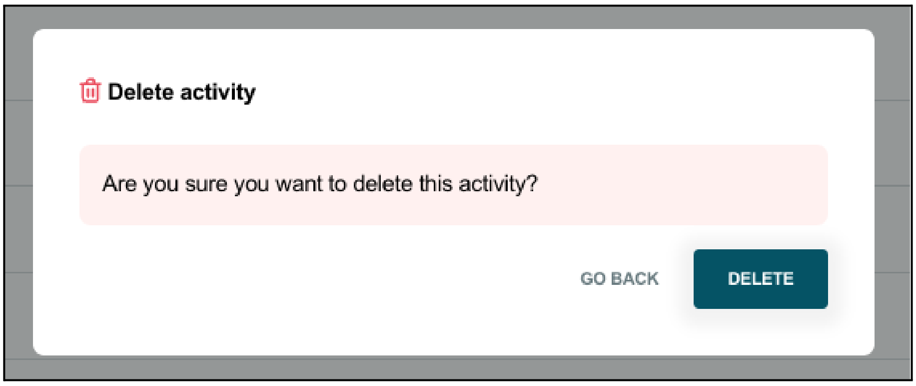
This will remove the activity from your public data and leave it in the IATI Publisher interface in draft state. It is easy to republish the activity if needed.




To delete an activity from the IATI Publisher interface, select its checkbox in the activity list then click on the trash icon next to “Add Activity”:




Deleting permanently removes the activity from IATI Publisher. You will be asked to unpublish the activity first, if applicable, then confirm deletion:



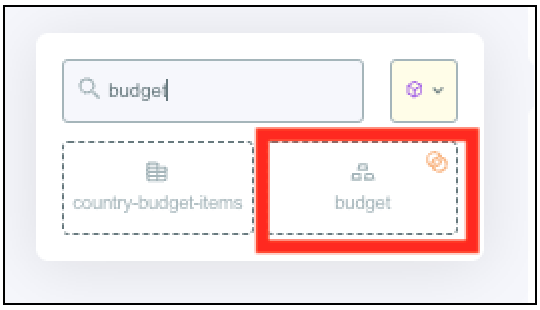
# Budgets and transactions

Budgets are for each financial quarter (or year) over the lifetime of an activity. They are useful to give recipient countries predictability of funding and to inform their planning.

Transactions are a record of the incoming or outgoing funds for an activity. They have a date (in the past), value, provider organisation and recipient organisation.

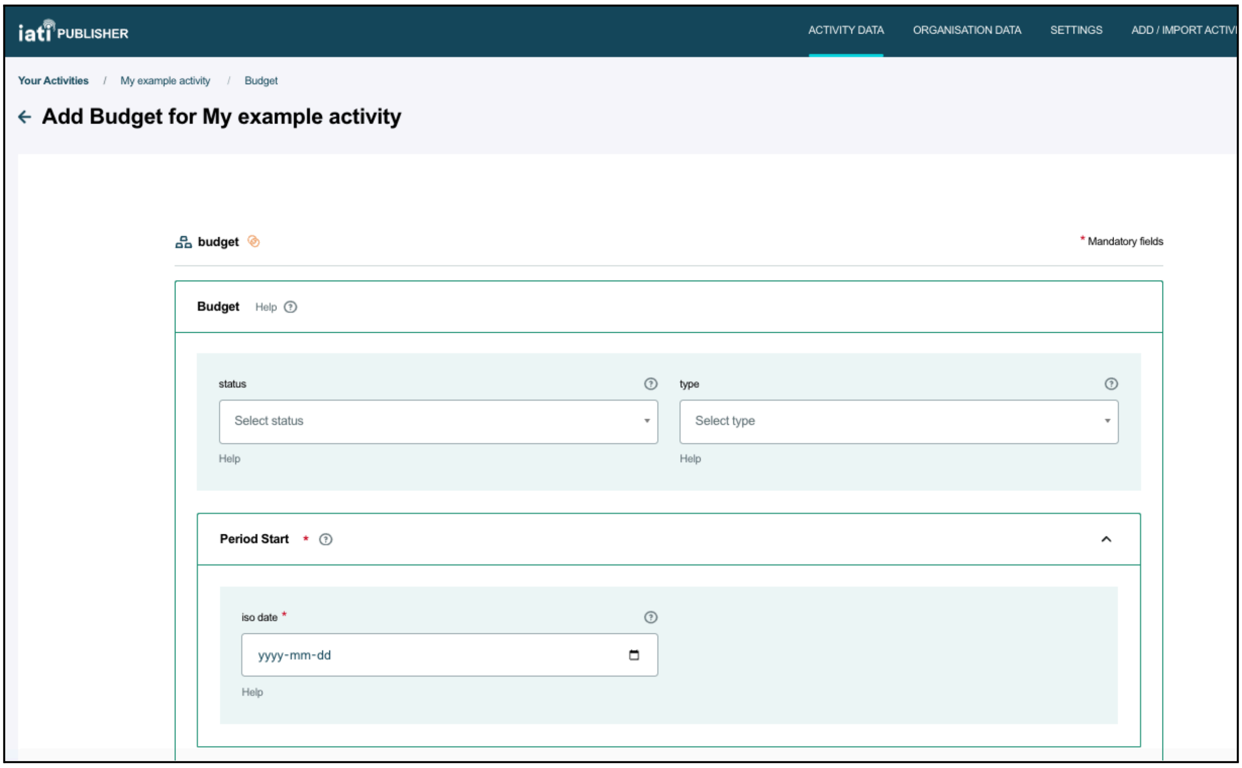
## How do I add budgets to my activity?

1. **Click on the “budget” element on the activity detail page**

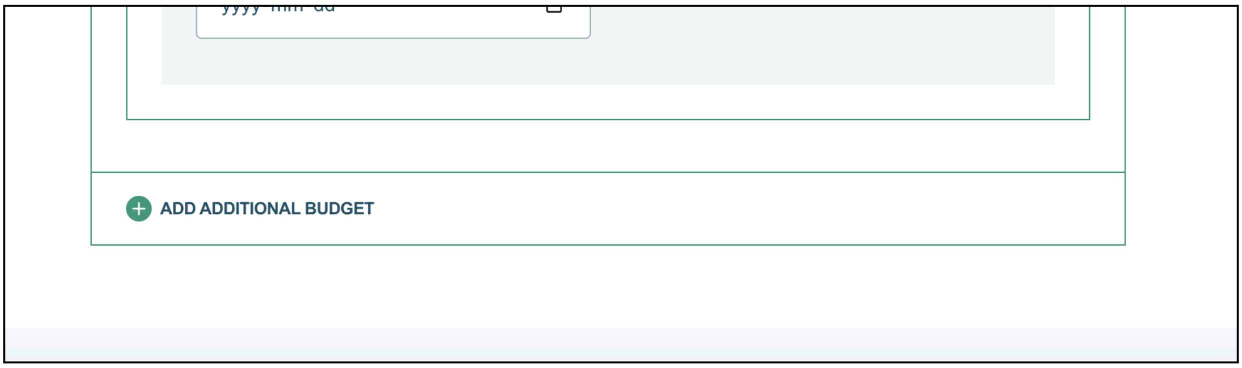



2. **Enter information in the budget data entry form**

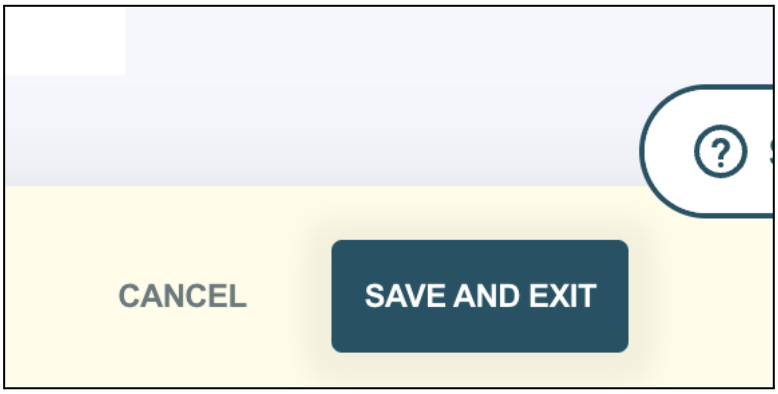
Mandatory fields are marked with red asterisks (period start, period end and budget value):



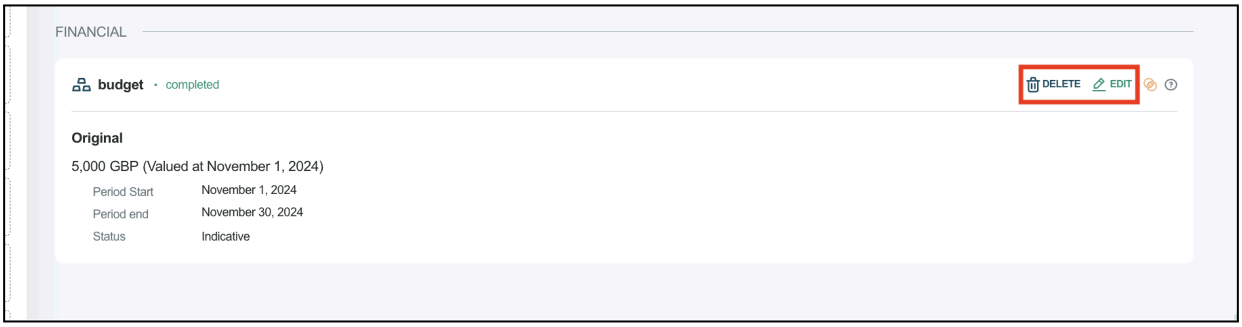
You can enter multiple budgets by clicking “Add Additional Budget” at the bottom:




3. **Click “Save and exit” to return to the activity detail page**

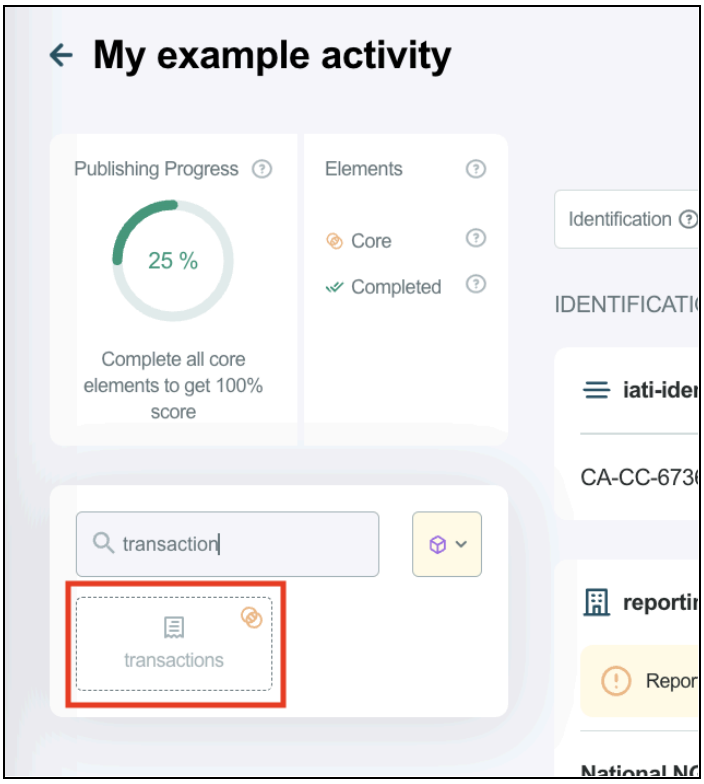



4. **Edit or delete budget information from the activity detail screen**

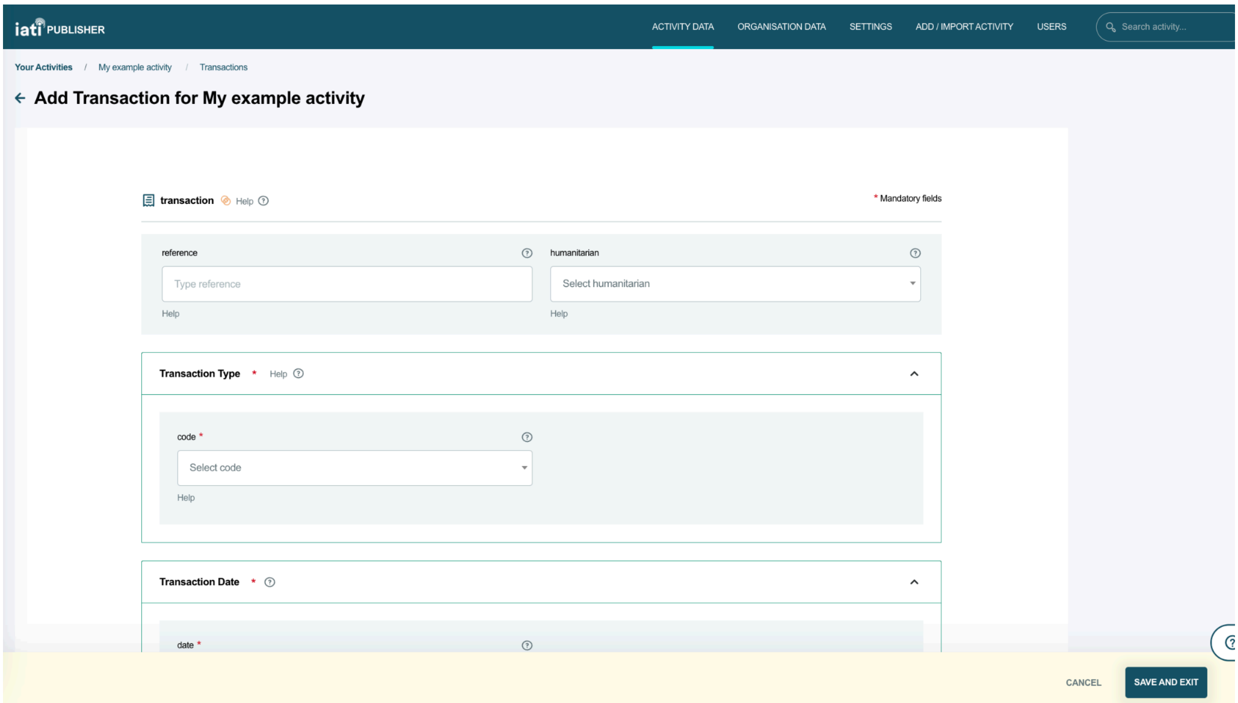


# How do I add transactions to my activity?

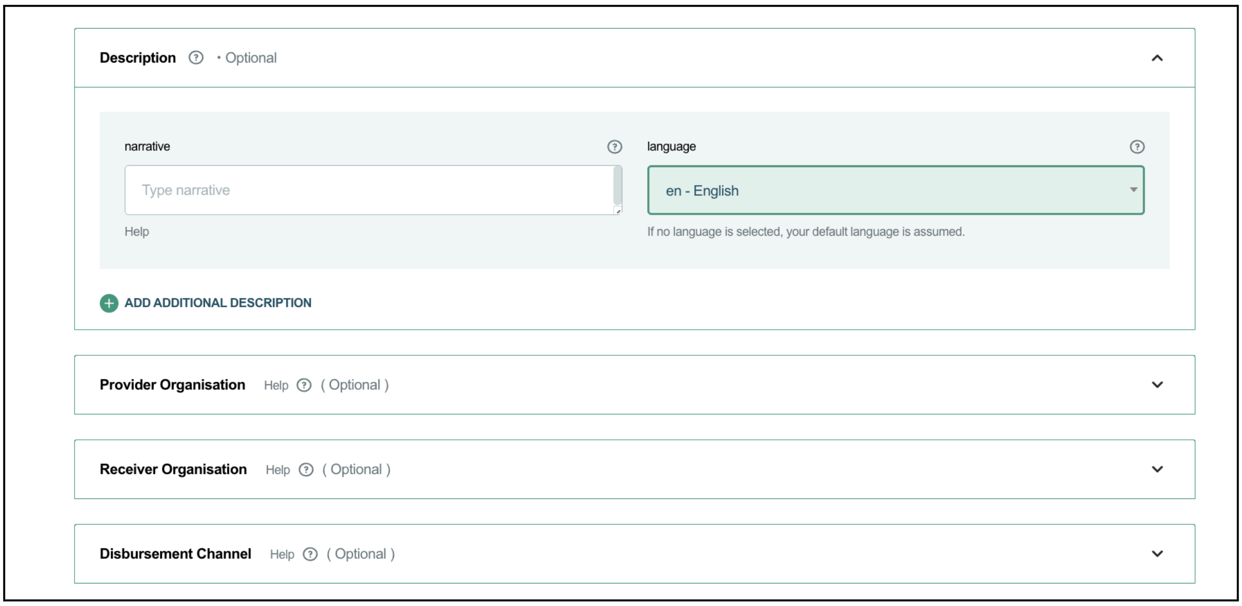
1. **Click on “transactions” in the left-hand menu on the activity detail page:**




2. **Enter information on your first transaction in the data entry form** (if you want to upload multiple transactions at once, skip to the [bulk import section](#))

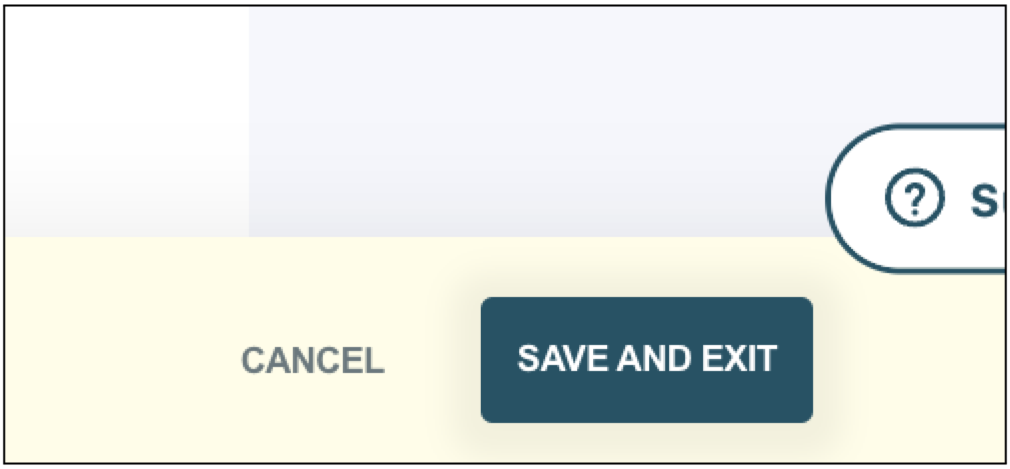


There are expandable optional fields:

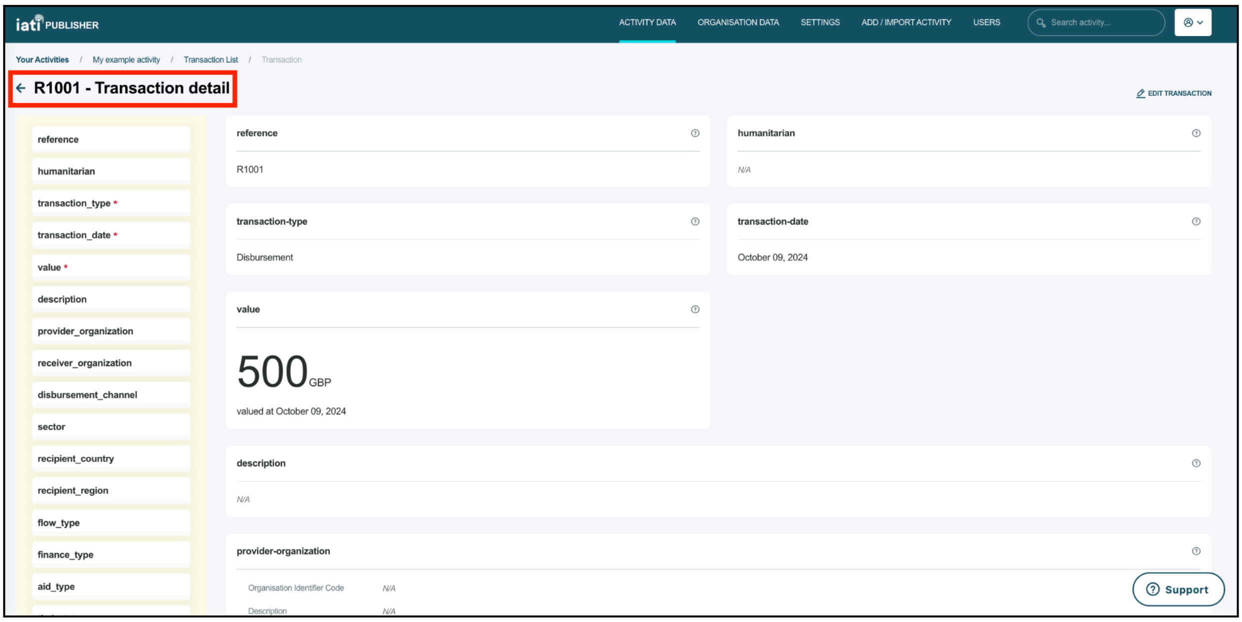



Some information can be provided at either activity or transaction level, but not both (e.g. sector, recipient country and recipient region). If you have already provided this information for the activity as a whole, the corresponding sections will be shown in grey as not editable in the transaction data entry form.

3. **Click "Save and Exit" to exit to the transaction detail page:**

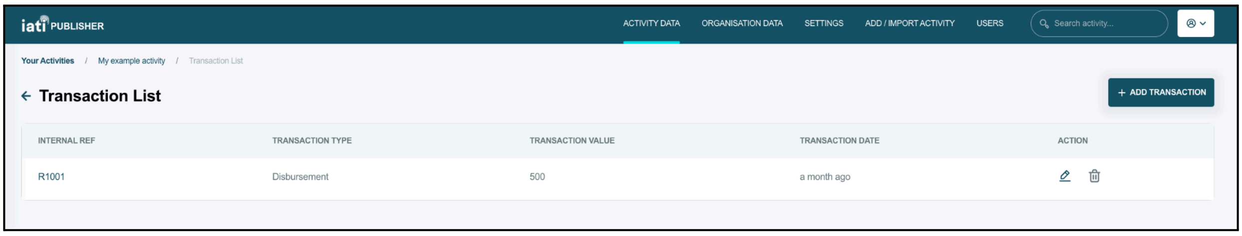


4. **Click the back arrow to view the Transaction List for the activity:**

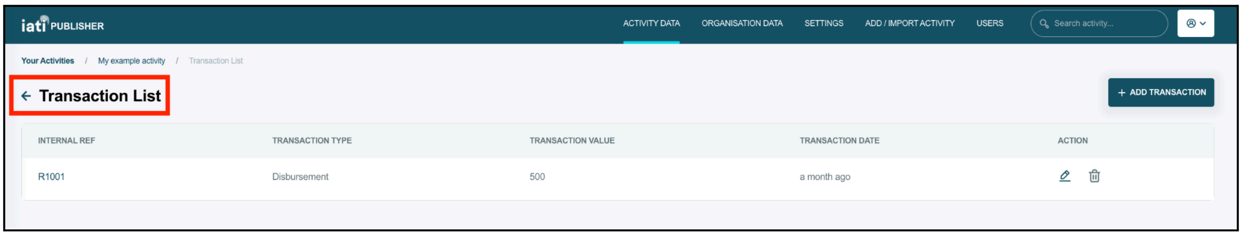



5. **View or edit information from the Transaction List**

You can view, edit and delete transactions from the Transaction List. You can also add a new transaction using the “Add Transaction” button:




6. **Exit to the activity detail page when finished:**

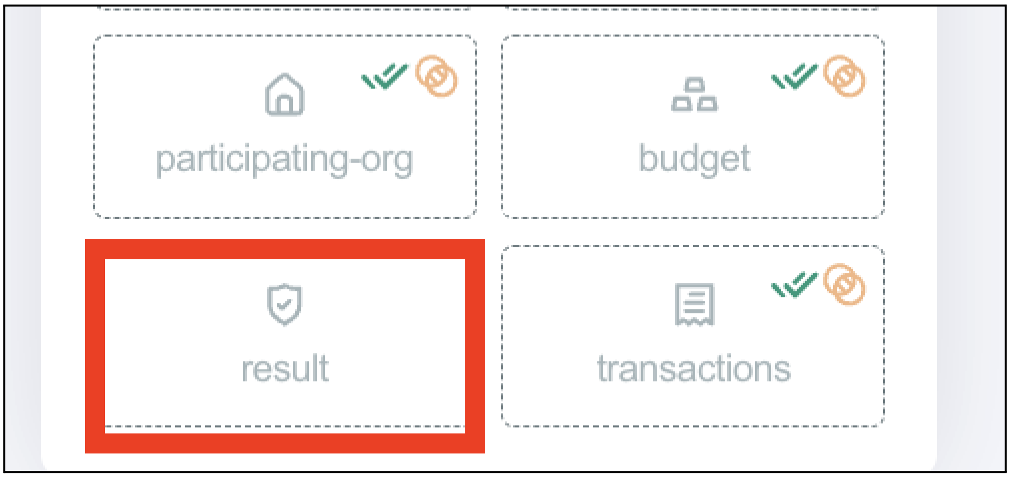


# Results, indicators and periods

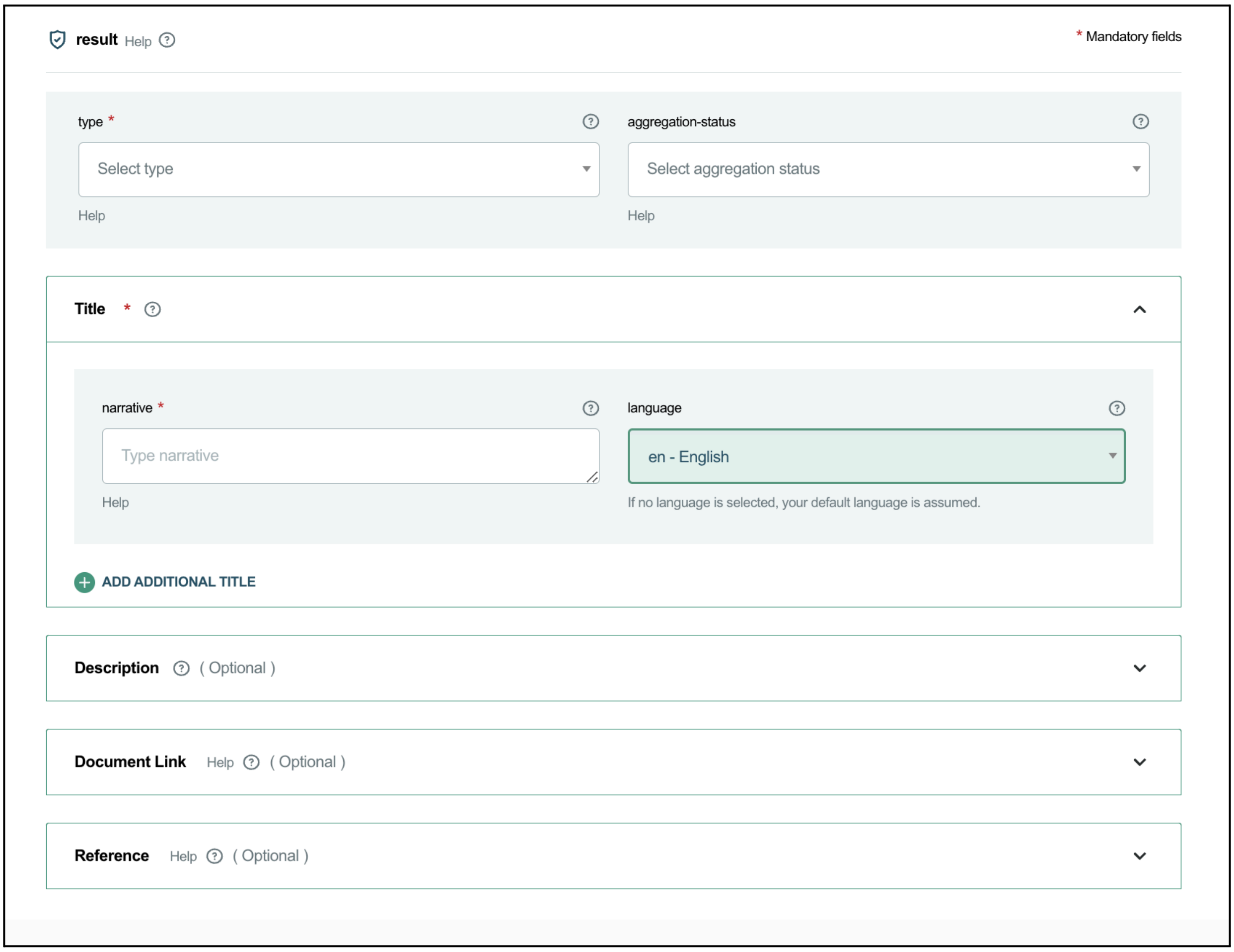
## How do I add a result to my activity?

1. Select the activity that you want to add a result to:

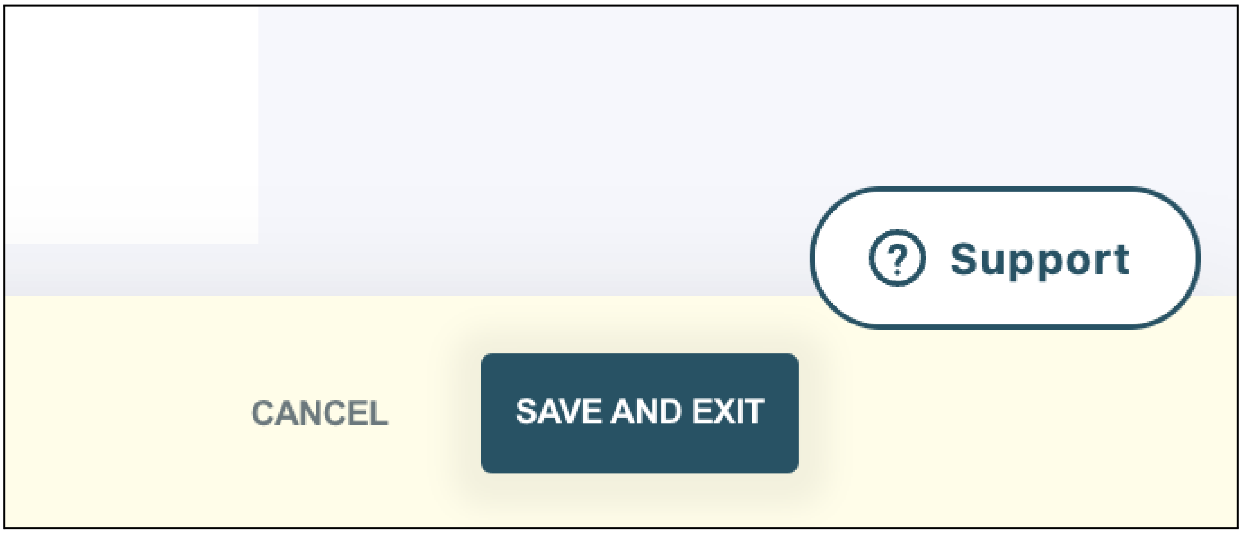

2. Click on the result element in the left hand menu:



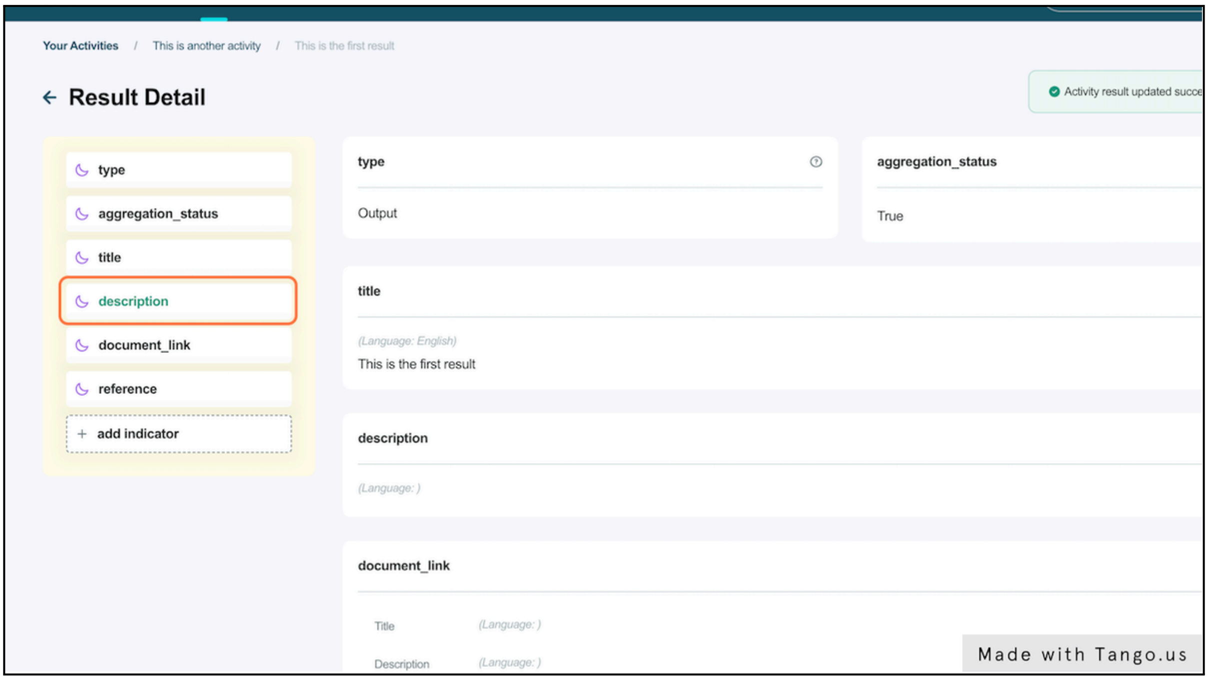
3. **Complete the data entry form**:




4. **Click on "Save and Exit":**

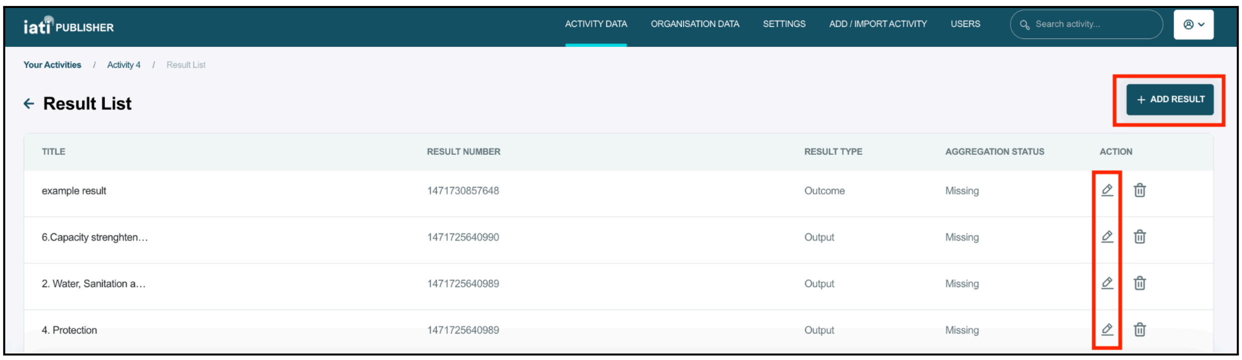


The result detail page shows the information that you have entered about the result. The left hand menu of sub-elements can be used to find a specific data field.




5. **Click on back button to go to the list of results:**


Results can edited or added from the Results List:

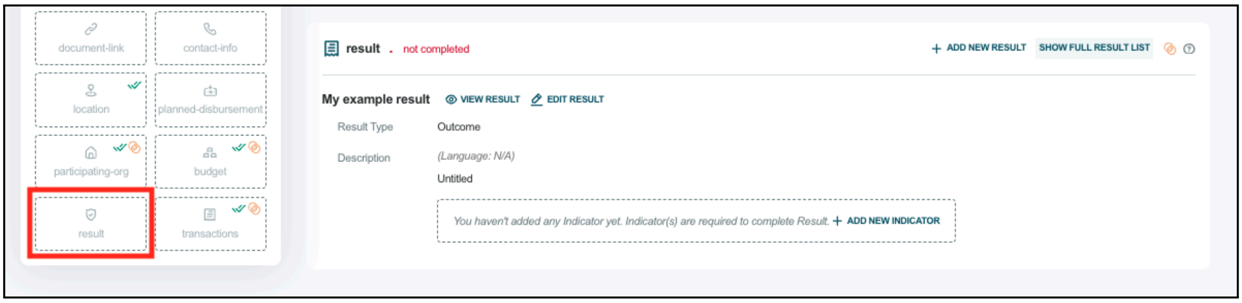


# How do I add indicators and periods?

Each result must have at least one indicator. This is a rule of the IATI Standard and should be followed to avoid errors in your published data.

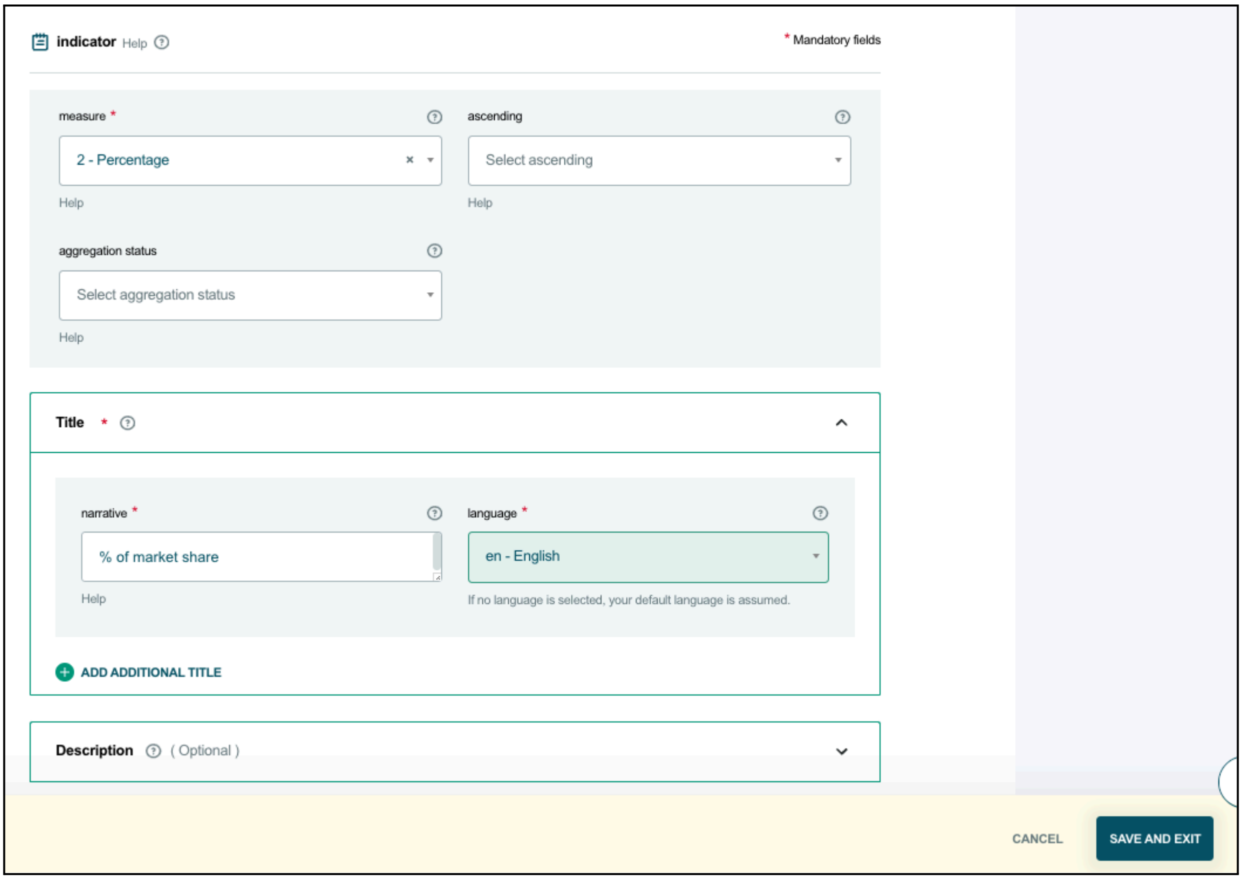
To add an indicator:

1. **Go to the your activity's results data**



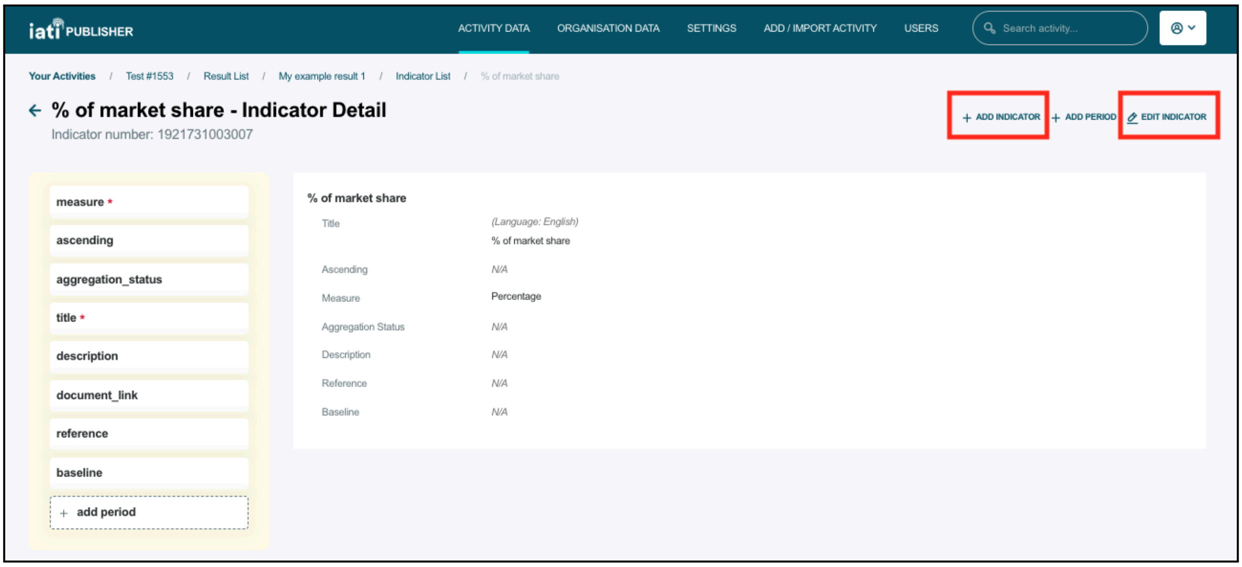

2. **Click "Add new indicator" against the result that you want to add an indicator for**

3. Complete the data entry form with information about the new indicator




4. Click "Save and Exit" at the bottom of the data entry form

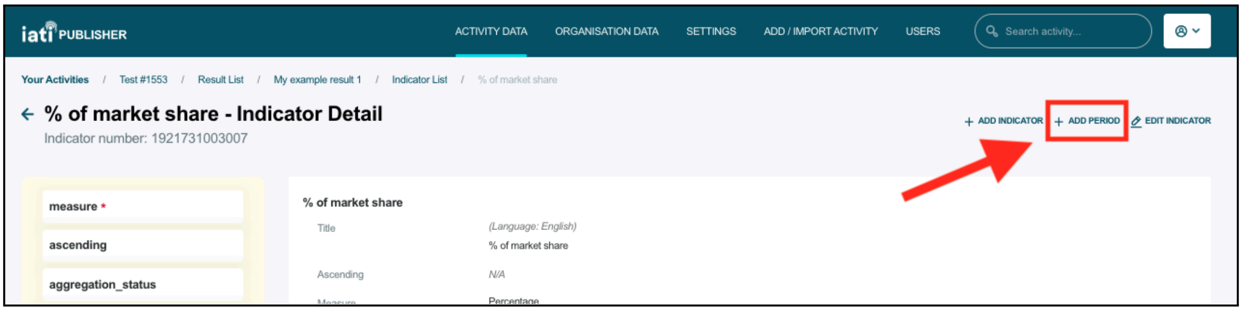
5. You can add another indicator or edit existing ones from the Indicator Detail page:

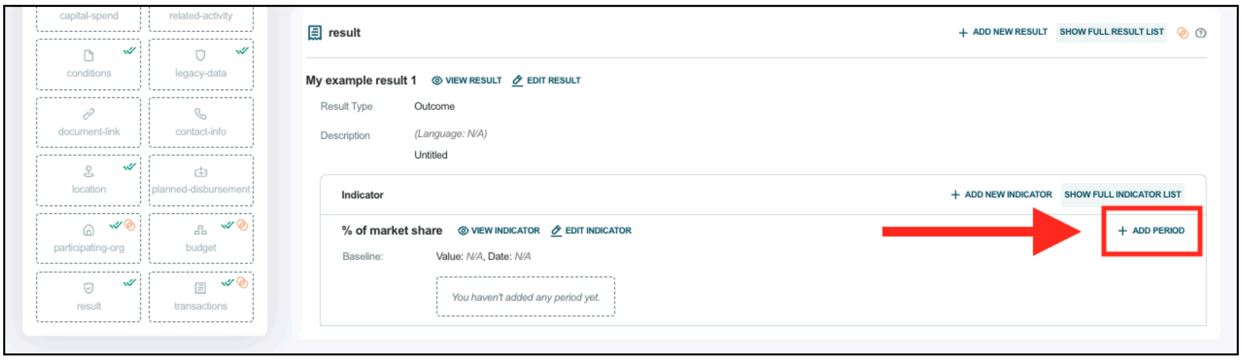


6. **Add a period to the indicator**

Periods can be added to indicators to record their target and actual values over time. Periods are not essential to add to your indicators before publishing for the first time. A result can have multiple indicators, and each indicator can have multiple periods.

You can add a period from the Indicator Detail page (top screenshot), or from the activity detail page (bottom screenshot):

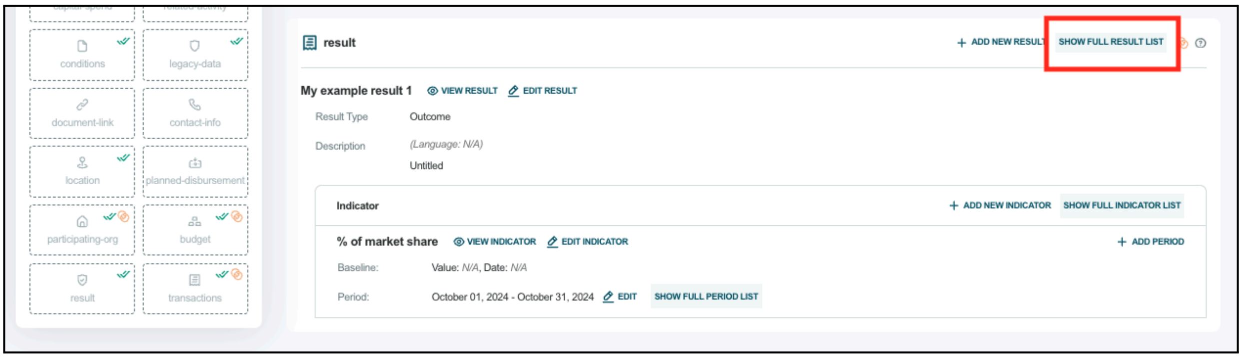


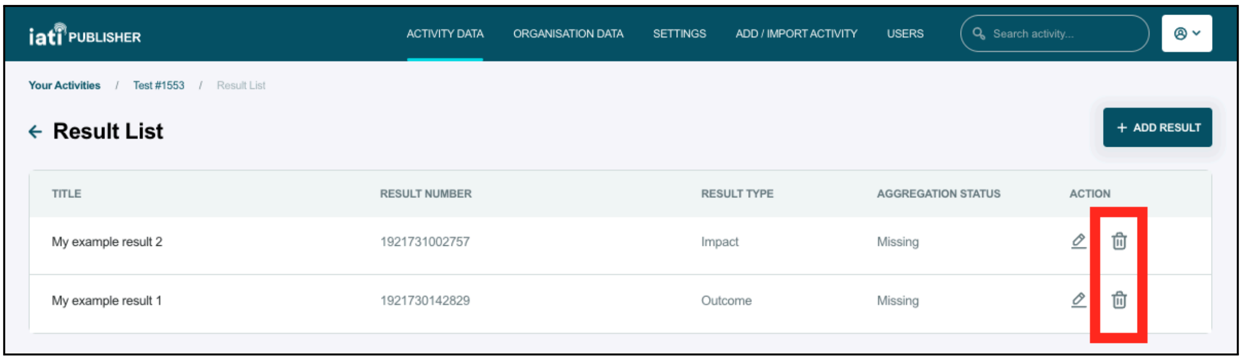
# How do I delete a result, indicator or period?

Deleting a result in the interface will delete any indicators or periods associated with it.

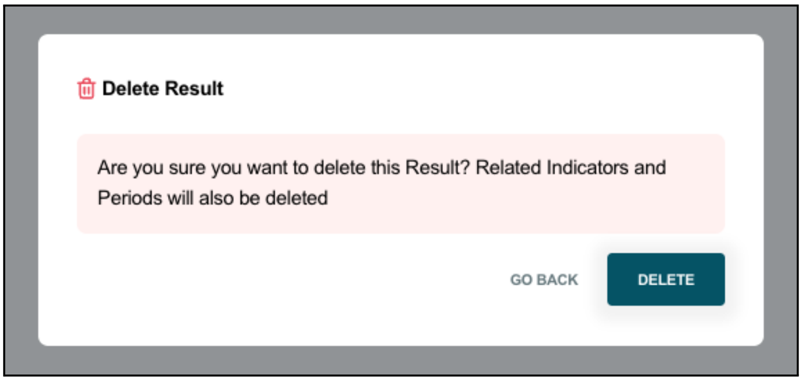
1. **Click on "Show full result list"**



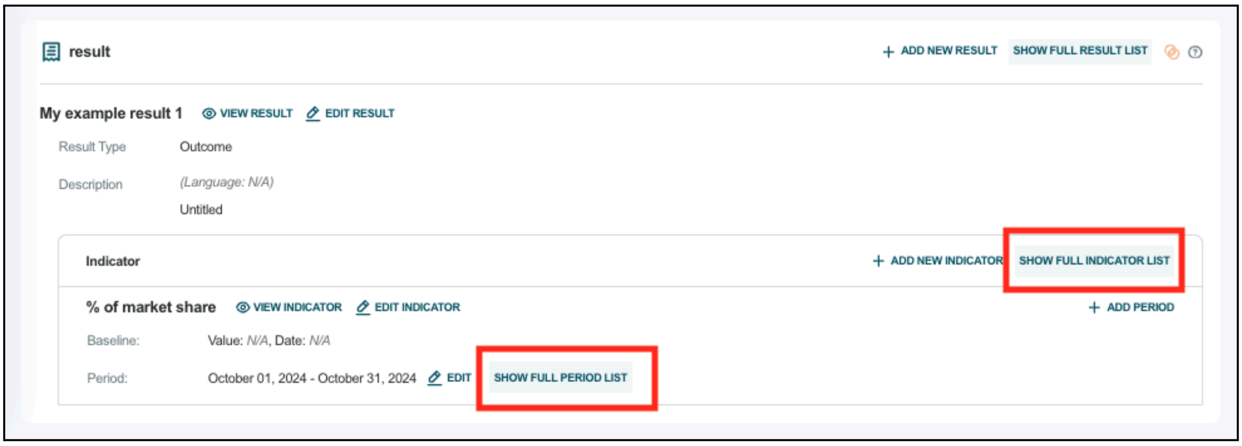

2. **Click on the trash can icon next to the result you want to delete:**




3. **Confirm deletion:**



To delete an individual indicator or period, click on “Show full indicator list” or “Show full period list” from the activity detail page, then follow the same steps as above:

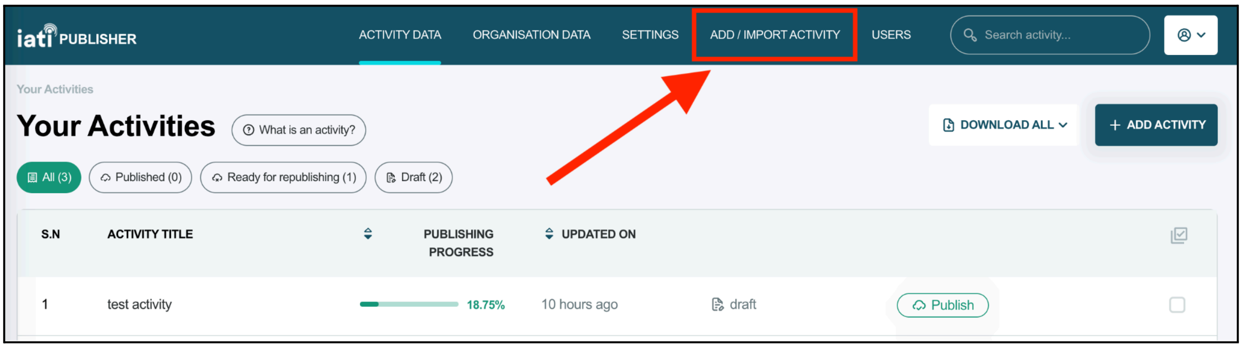


# Importing and exporting activities

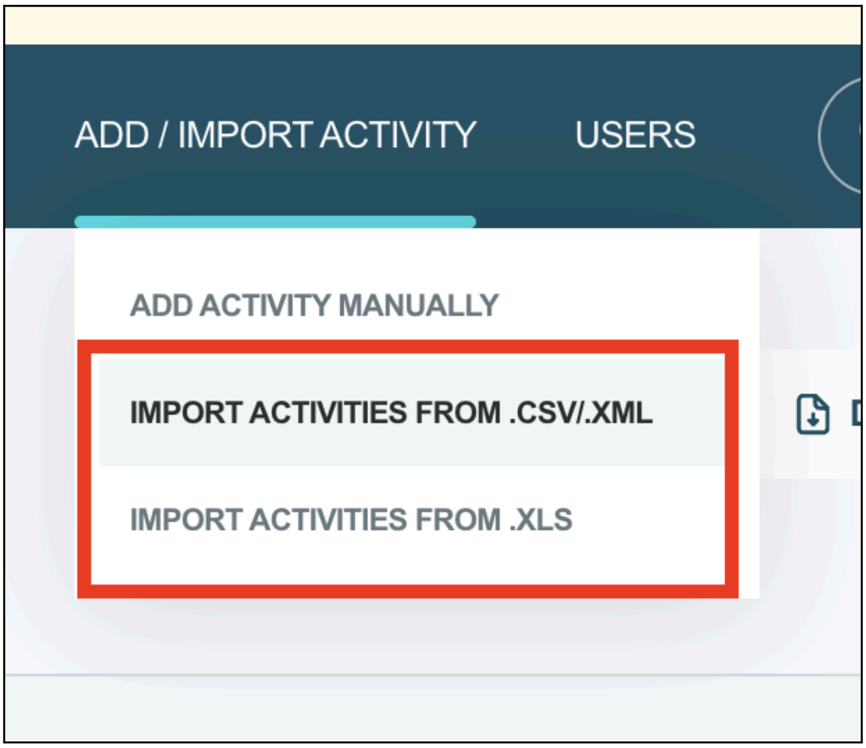
IATI Publisher allows you to import and export activity data in three file formats (XML, CSV and XLS). This functionality can be useful if you want to import multiple activities, transactions, budgets or results in one go.

## How do I import activity data?

1. **Click "Add / Import Activity" in the main menu:**




2. **Select the file format that you want to import:**

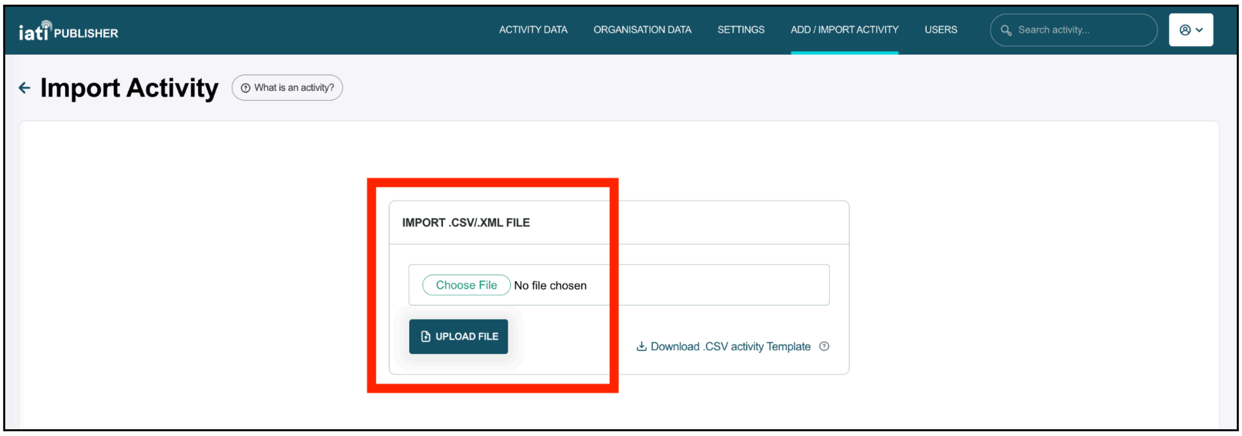


3. **Follow instructions on the import page**

### Import via XML

XML is the file format used by the IATI Standard. IATI Publisher creates and publishes IATI XML files for you when you publish your activity and organisation data in the interface. The import functionality may be useful if you are transferring IATI data from a different publishing tool to IATI Publisher.

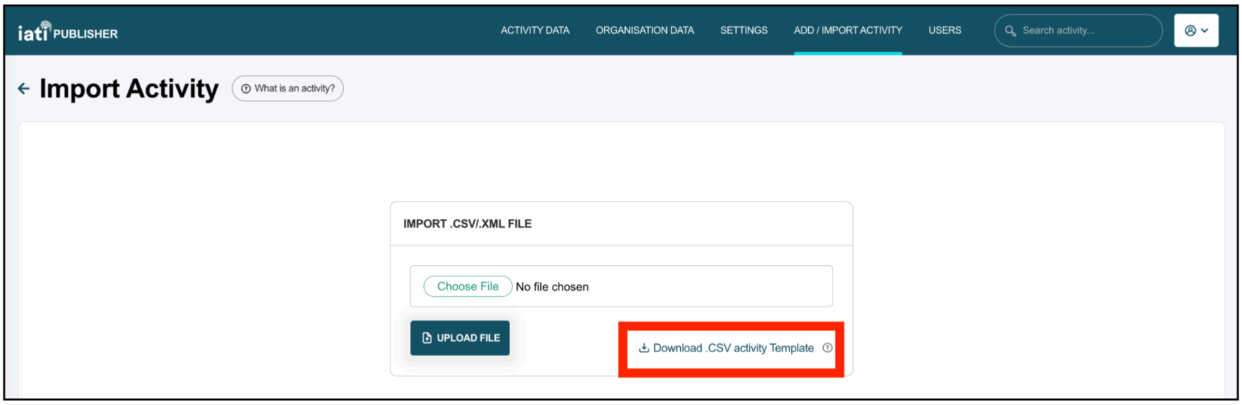
Select and upload your XML file on the CSV/XML import page:




### Import via CSV

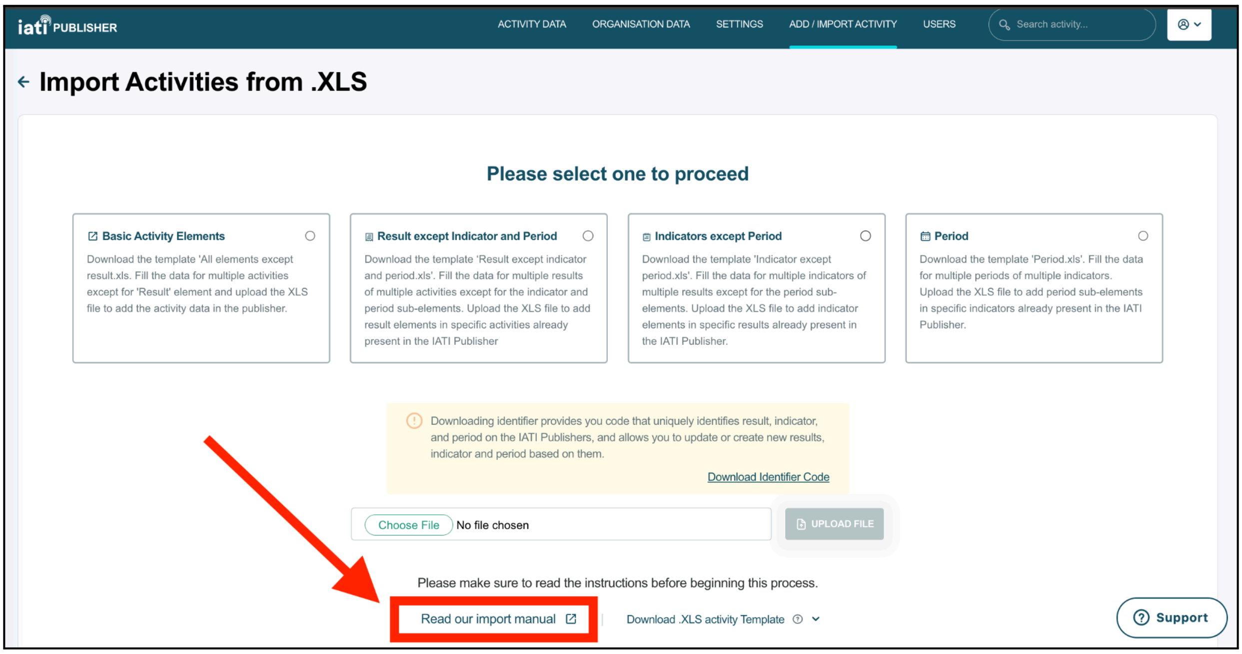
You can download the IATI Publisher CSV template from the CSV/XML data import page. This template contains a wide range of IATI Standard fields and it is not necessary to populate everything. Refer to [IATI Standard guidance] on how to interpret the fields.

Note: it is not possible to upload activity results, indicators or periods via the CSV import.



### Import via XLS

You can find templates and further guidance for XLS importing on the import page:



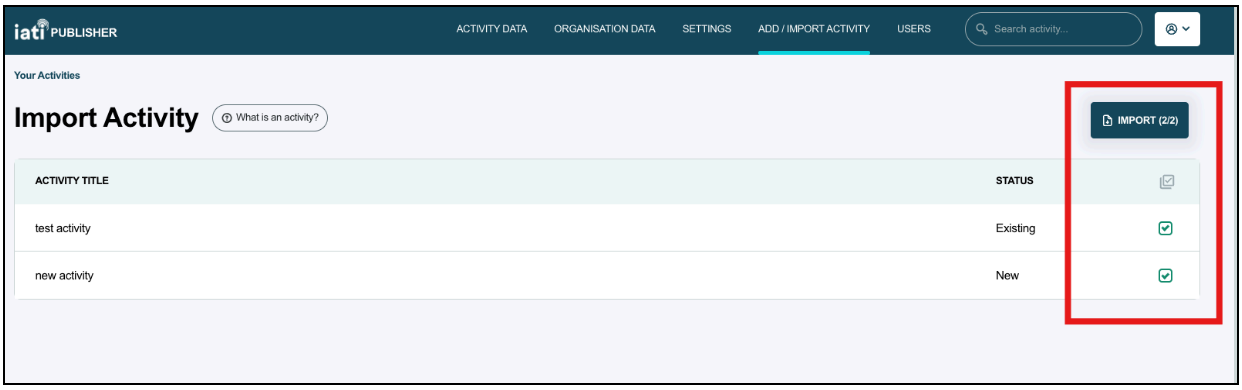

4. **View the imported activities**

Once you have uploaded your data, IATI Publisher will list the activities ready for import with information on any data quality errors. Critical errors prevent the activity from being imported, whereas other errors will not prevent import. It is usually easier to fix errors in your data file before importing, rather than after in the interface.

5. **Select the checkboxes for the activities that you want to import**

6. **Click on “Import” to confirm**

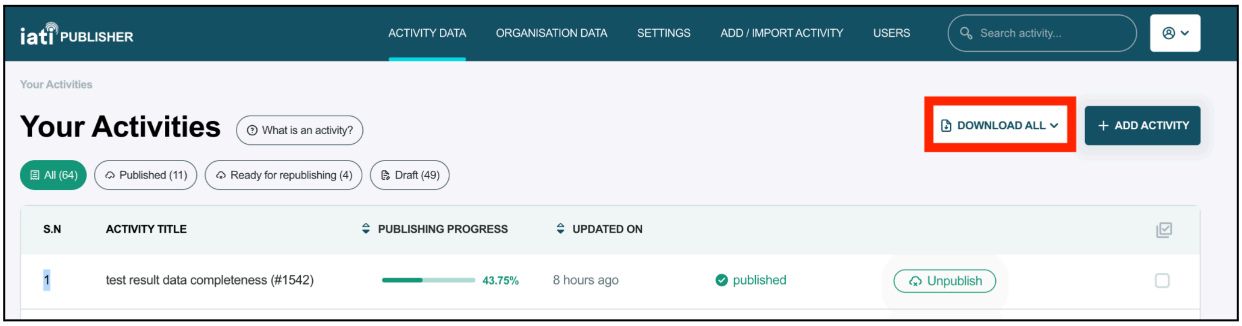
You will see your new activities listed in the interface. Click on an activity to view or edit it.



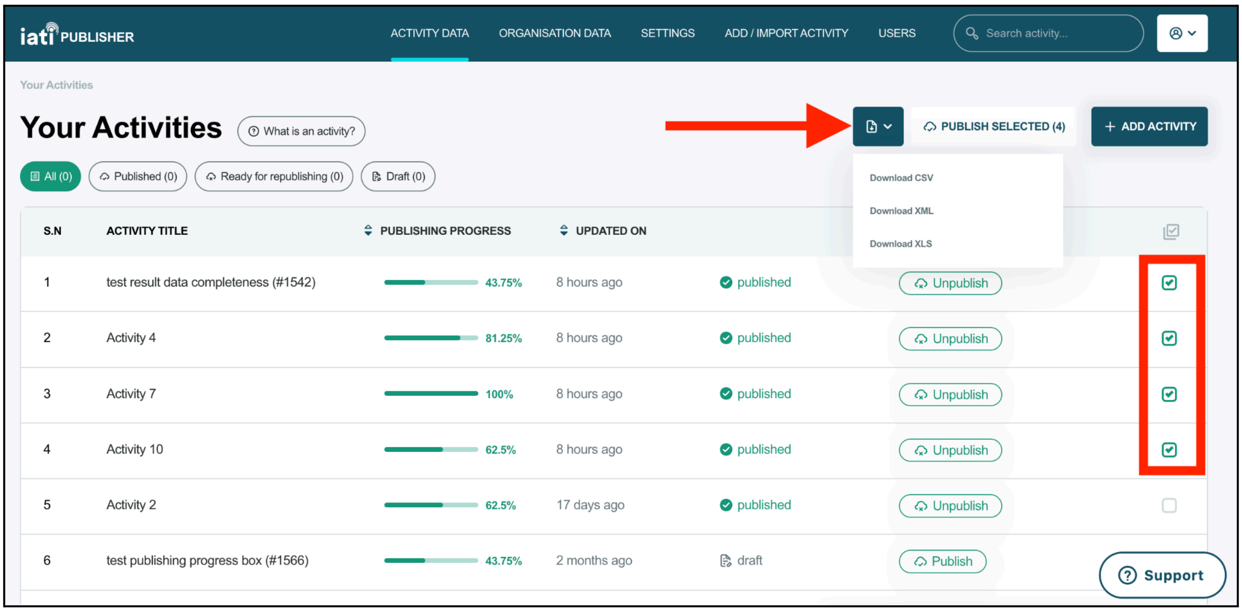
# How do I export activity data?

1. **Select which activities you want to export from the activity list**

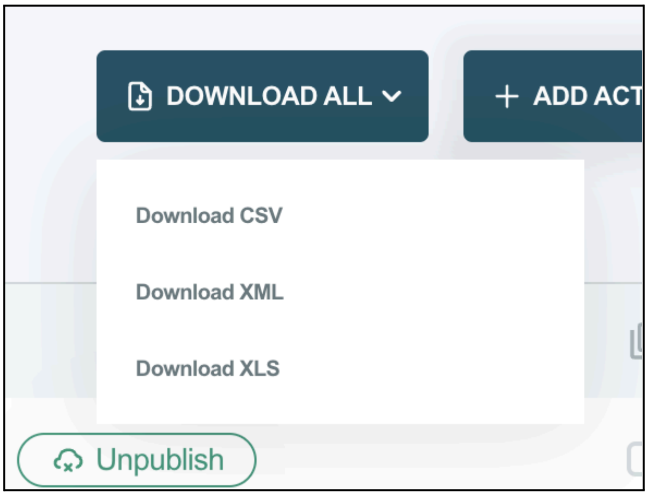
To export all, click the “Download All” button:




To export a subset of activities, select them via checkbox and click the download icon:

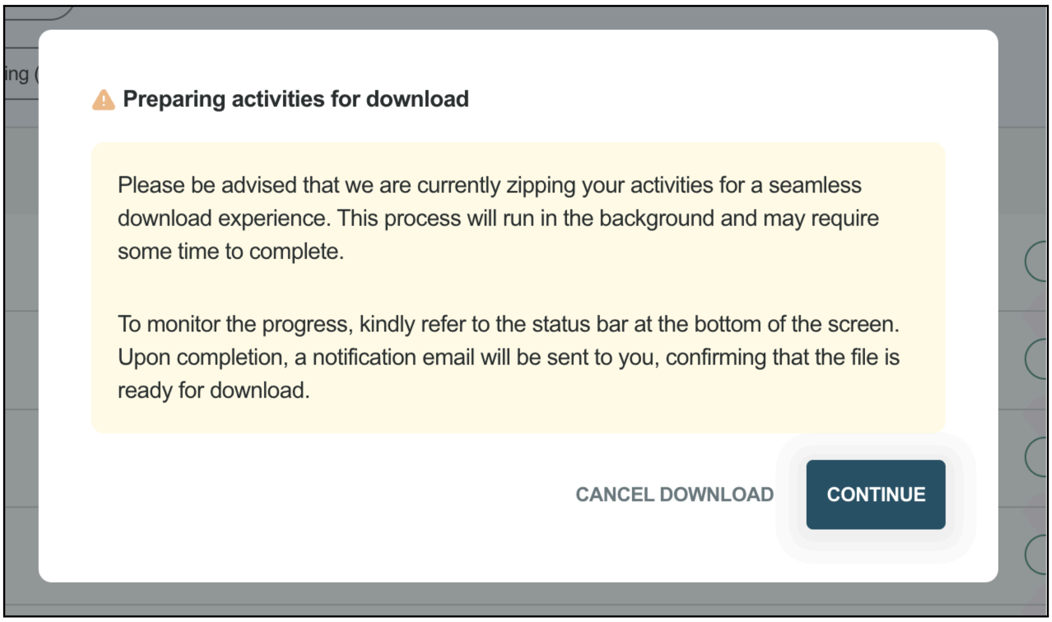



2. **Select the file format you want to download from the dropdown menu**



3. **Wait for your file to download**

Note: If you select XLS, you will receive a prompt about the file download being prepared. Click “Continue” to start the download:




# Support

We always welcome feedback on IATI Publisher and are happy to help with any issues. To get in touch, please email us at support@iatistandard.org or use the Support button within the tool.