

# 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.

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# 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”:

The image is a composite of two screenshots. On the left, the IATI Publisher homepage is shown. It features a dark blue header with the text "IATI Publisher". Below this is a light blue section containing the text: "Welcome to IATI Publisher. This lets you publish IATI data on your organisation's development and humanitarian activities." At the bottom of this section, there is a link "Haven't registered yet? [Join Now](#)". A red rectangular box surrounds the "Join Now" link, and a red arrow points from this box to the "Email / Username" input field on the adjacent "Sign In" page. The "Sign In" page has a white background and includes fields for "Email / Username" and "Password", along with links for password reset and sign-in.

## 2. Select “My organisation is new to IATI”:

The screenshot shows the 'Join Now' page of the IATI Publisher. It features two main options:

- My organisation is new to IATI**: This option is highlighted with a red border. It includes a small icon of a gift box and the text: "Use this option if your organisation has not registered an account with IATI on the IATI Registry".
- My organisation has registered with IATI**: This option includes a small icon of a person and the text: "Use this option if your organisation has already registered on the IATI Registry, but is new to using IATI Publisher".

Below the options, there is a note: "If you are a new user of an organisation already using IATI Publisher, an admin user from your organisation can create an account for you. If you need help, or are not sure which option to select, please [Contact Support](#)".

## 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](#).

The screenshot shows the 'Create IATI Publisher Account and IATI Registry Account' page. The left side contains the 'Publisher Information' form, and the right side shows a progress bar for 'Step 1 out of 5'.

**Publisher Information**

Publisher Name *	My example organisation	* Mandatory fields
Publisher ID *	example_org	Country
CA-CC - Corporations Canada	CA - Canada	X ▾
Organisation Registration Agency *	CA-CC - Corporations Canada	E.g. 123456
IATI Organisation Identifier *	CA-CC-6736289	Organisation Type *
	22 - National NGO	X ▾

A red arrow points from the word 'Guidance' above the form to the 'Publisher Name' field.

**Step 1 out of 5**

- Publisher Information** (marked with a checkmark)
- 2 Contact Information
- 3 Publishing Additional Information
- 4 Administrator Information
- 5 Email Verification

This is autogenerated, please make sure to fill the above fields correctly.

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

## Create IATI Publisher Account and IATI Registry Account

Start your IATI publishing journey by creating accounts in both IATI Publisher and the IATI Registry

**Contact Information** \* Mandatory fields

Contact Email \*  Website

Address

[← GO BACK](#) [NEXT STEP →](#)

Already have an account? [Sign In.](#)

**Step 2 out of 5**

- ✓ Publisher Information
- 2 Contact Information**  
This is your organisation's contact information
- 3 Publishing Additional Information
- 4 Administrator Information
- 5 Email Verification

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

## Create IATI Publisher Account and IATI Registry Account

Start your IATI publishing journey by creating accounts in both IATI Publisher and the IATI Registry

**Publishing Additional Information** \* Mandatory fields

Source \*  Default language \*

Record Exclusions

[← GO BACK](#) [NEXT STEP →](#)

**Step 3 out of 5**

- ✓ Publisher Information
- ✓ Contact Information
- 3 Publishing Additional Information**  
This is about how your organisation will publish data
- 4 Administrator Information
- 5 Email Verification

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)

## Create IATI Publisher Account and IATI Registry Account

Start your IATI publishing journey by creating accounts in both IATI Publisher and the IATI Registry

### Administrator Information

\* Mandatory fields

Full Name \*

Email Address \*

Username \*

Password \*

Confirm Password \*

Minimum length: 8 characters

This should match the password on the left

[← GO BACK](#) [NEXT STEP →](#)

**Step 4 out of 5**

- ✓ Publisher Information
- ✓ Contact Information
- ✓ Publishing Additional Information

**4 Administrator Information**

This will create an admin account for you as an individual

5 Email Verification

7. Click “Get Started” to return to the homepage:

## Create IATI Publisher Account and IATI Registry Account

Start your IATI publishing journey by creating accounts in both IATI Publisher and the IATI Registry

### Please verify your account

A verification email has been sent to [REDACTED]. Please click on the link in the email to verify and activate your new IATI publisher account.



[GET STARTED →](#)

**Step 5 out of 5**

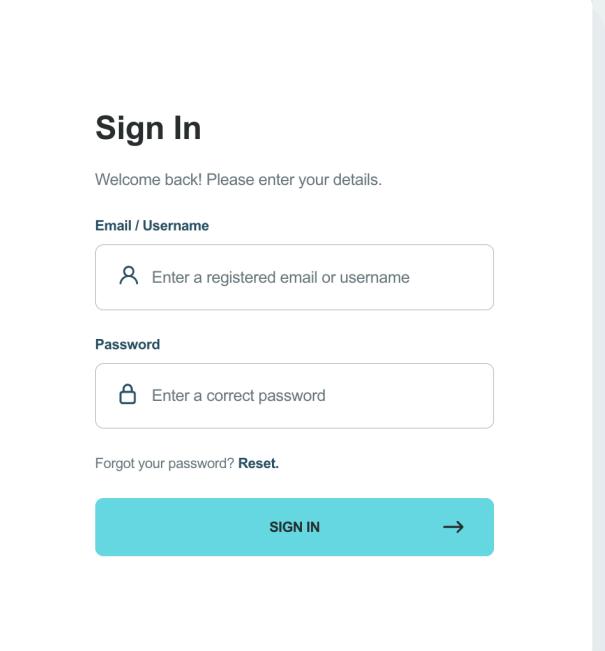
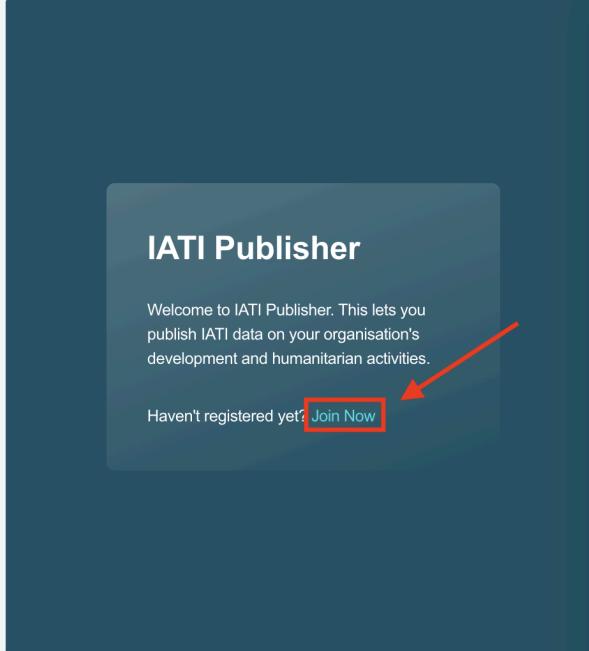
- ✓ Publisher Information
- ✓ Contact Information
- ✓ Publishing Additional Information
- ✓ Administrator Information

**5 Email Verification**

Please verify and activate your IATI Publisher account through your provided email

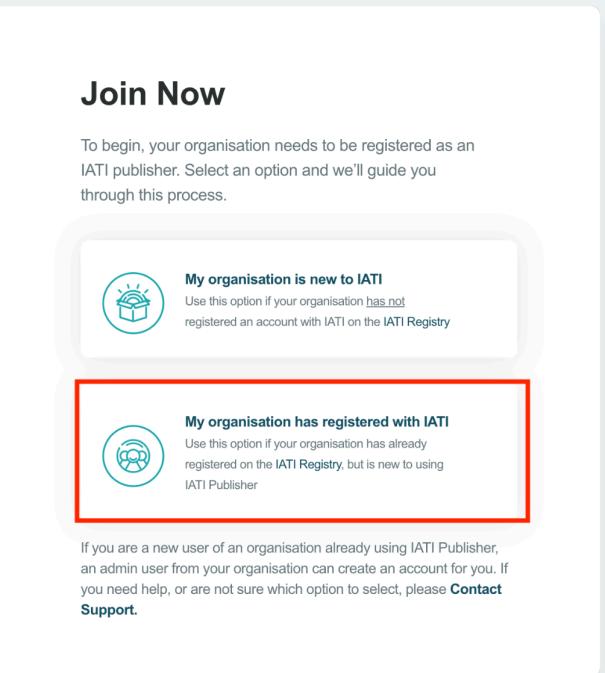
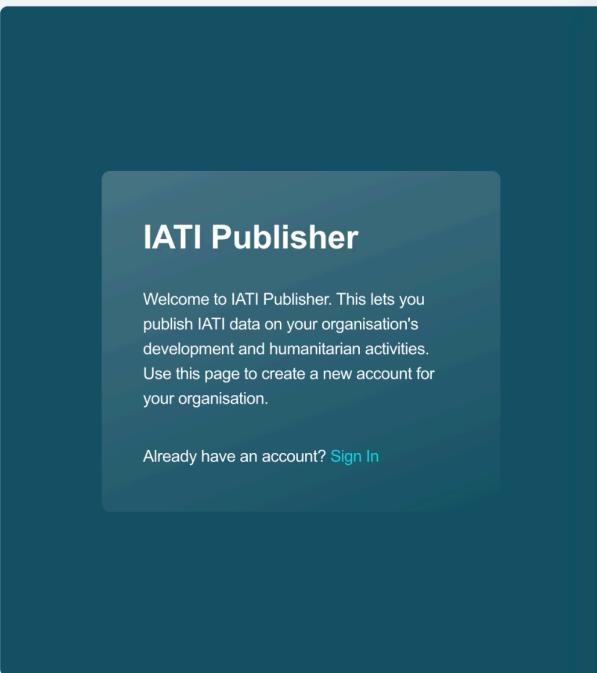
## Option B: My organisation has registered with IATI

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



The image shows two side-by-side screenshots. The left screenshot is the IATI Publisher homepage, which has a dark blue header and a light blue footer. It features the 'IATI Publisher' logo and a welcome message: 'Welcome to IATI Publisher. This lets you publish IATI data on your organisation's development and humanitarian activities.' Below this, there is a link 'Haven't registered yet? [Join Now](#)'. A red arrow points from the text 'click “Join Now”:' in the instructions above to this link. The right screenshot is the 'Sign In' page, which has a white background. It has fields for 'Email / Username' and 'Password', both with placeholder text ('Enter a registered email or username' and 'Enter a correct password'). Below the fields is a link 'Forgot your password? [Reset](#)'. At the bottom is a teal-colored 'SIGN IN' button with a white arrow icon.

2. Select “my organisation has registered with IATI”:



The image shows two side-by-side screenshots. The left screenshot is the IATI Publisher homepage, identical to the one in the previous step. The right screenshot is the 'Join Now' page, which has a white background. It contains two options: 'My organisation is new to IATI' (with a gift box icon) and 'My organisation has registered with IATI' (with a globe icon). The second option is highlighted with a large red box. Below the options is a note: 'If you are a new user of an organisation already using IATI Publisher, an admin user from your organisation can create an account for you. If you need help, or are not sure which option to select, please [Contact Support](#)'.

### 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](#):

The screenshot shows the IATI Registry homepage with the navigation bar: News, Events, Contact, ABOUT, IATI STANDARD, USING DATA, GUIDANCE & SUPPORT, COMMUNITY, Home, Data, Publishers, Using IATI Data, Dashboard, About, API, Help, Sysadmin, My Data, My Account, Logout. Below the navigation is a breadcrumb trail: Home / Publishers / My organisation Z. A sidebar on the left lists Contact (n/a), Website (n/a), Description (n/a), IATI identifier (GB-COH-1234), and Implementation Schedule. The main content area shows a placeholder building icon and a summary for 'My organisation Z': Identifier: GB-COH-1234, Publisher Id: org\_z, HQ Country: United Kingdom, First published date: 13 June 2024, Contact: org\_z@email.com. It also shows follower and dataset counts: 0 Followers, 2 Datasets.

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

The screenshot shows the 'Create IATI Publisher Account' page. The title is 'Create IATI Publisher Account' with the subtitle 'Start your IATI publishing journey by creating an account in IATI Publisher'. The left side has a form titled 'Publisher Information' with fields: Publisher Name (My organisation Z), Publisher ID (org\_z), Country (GB - United Kingdom of Great Britain and ...), Organisation Registration Agency (GB-COH - Companies House), Organisation Registration Number (1234), and IATI Organisation Identifier (GB-COH-1234). A note says 'This is autogenerated, please make sure to fill the above fields correctly.' The right side shows 'Step 1 out of 3' with a list: 1. Publisher Information (selected), 2. Administrator Information, 3. Email Verification. At the bottom are links for 'Already have an account? Sign In.' and a 'NEXT STEP →' button.

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)

## Create IATI Publisher Account

Start your IATI publishing journey by creating an account in IATI Publisher

**Administrator Information** \* Mandatory fields

Full Name \* Email Address \*

Tensoon Owens iatitester0@gmail.com

Username \* Default language \*

tensoon\_owens\_18 en - English

Password \* Confirm Password \*

\*\*\*\*\* \*\*\*\*\*

[← GO BACK](#) [NEXT STEP →](#)

Already have an account? [Sign In.](#)

**Step 2 out of 3**

✓ **Publisher Information**

**2 Administrator Information**

This information will be used to create an admin account in IATI Publisher

**3 Email Verification**

5. Click “Get Started” to return to the homepage:

## Create IATI Publisher Account

Start your IATI publishing journey by creating an account in IATI Publisher

**Please verify your account**

A verification email has been sent to [REDACTED]  
Please click on the link in the email to verify and activate your new IATI publisher account.



[GET STARTED →](#)

**Step 3 out of 3**

✓ **Publisher Information**

✓ **Administrator Information**

**3 Email Verification**

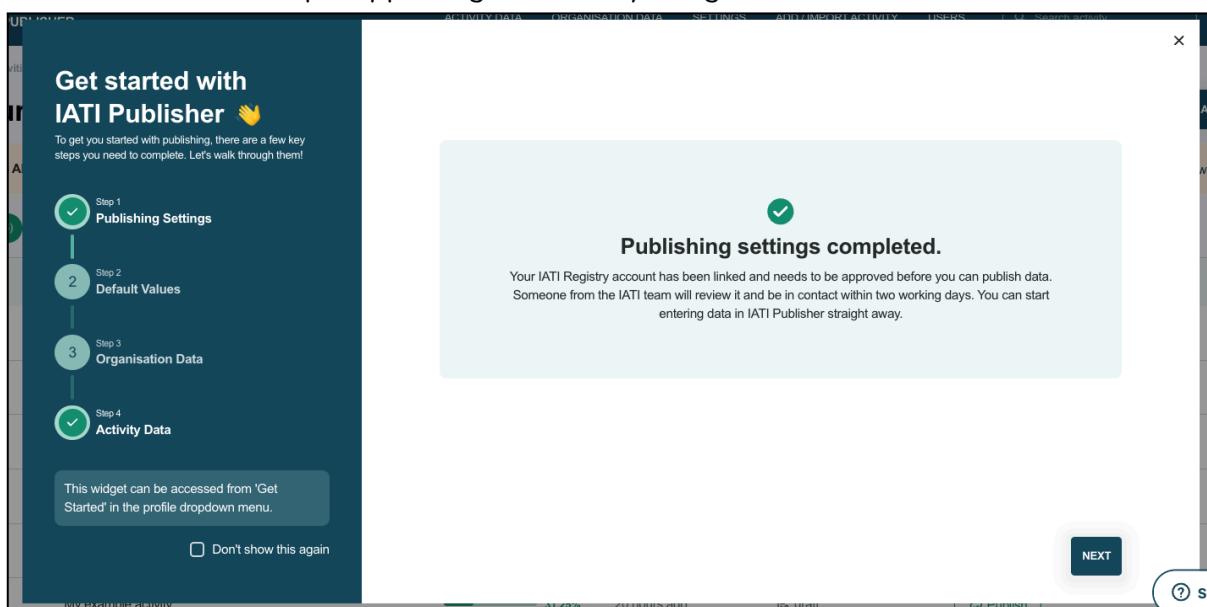
Please verify and activate your IATI Publisher account through your provided email

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

- From the [IATI Publisher homepage](#), enter the email address and password that you registered with, then click “Sign In”:

The image shows two side-by-side screenshots. On the left is the IATI Publisher homepage, which has a dark teal header with the title 'IATI Publisher'. Below the header is a light gray box containing the text: 'Welcome to IATI Publisher. This lets you publish IATI data on your organisation's development and humanitarian activities.' At the bottom of this box is a link 'Haven't registered yet? [Join Now](#)'. On the right is the 'Sign In' page. It has a header 'Sign In' and a sub-header 'Welcome back! Please enter your details.' Below this are two input fields: 'Email / Username' containing 't.owens@email.com' and 'Password' containing '\*\*\*\*\*'. Both fields are highlighted with a red border. Below the password field is a link 'Forgot your password? [Reset](#)'. At the bottom is a large blue 'SIGN IN' button with a white arrow pointing to the right. A red arrow points from the 'SIGN IN' button on the right page to the 'SIGN IN' button on the left page.

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

The screenshot shows the iati PUBLISHER interface. At the top, there's a navigation bar with tabs like ACTIVITY DATA, ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY, and USERS. On the far right of the header, there's a search bar labeled "Search activity..." and a user profile icon for "Emma Clegg". A red arrow points from the text above to this user profile area. Below the header, the main content area is titled "Your Activities" with a sub-section "What is an activity?". It shows 1 Alert and 0 Complete your setup. There are filters for All (1), Published (1), Ready for republishing (0), and Draft (0). A table lists one activity: "Test #1553" with S.N. 1, Activity Title "Test #1553", Publishing Progress at 87.5% (green bar), Updated On 3 hours ago, and Status published. There are "Unpublish" and "Edit" buttons for this row. To the right of the table, there's a "Get Started" button and a "Logout" link. The user profile dropdown menu is open, showing options: "Your Profile" (which is highlighted with a red box), "Get Started", and "Logout".

3. Update information on your profile page when needed

(Example) Change your sign-in password:

The screenshot shows the profile page for "Terry Marks". The top navigation bar is identical to the previous screenshot. The main content area is titled "Terry Marks". It contains sections for "Your Information" (Name: Terry Marks, Username: t\_marks\_63, Language Preference: English, Email: [REDACTED], Organisation: Emma's test publisher - Sep 2024, Role: admin) and "Edit Your Profile" (a blue button on the right). A red arrow points from the text above to the "Edit Your Profile" button. Below the "Edit Your Profile" button, there's a link "Change your password" with a checked checkbox next to it, also highlighted with a red box.

(Example) Edit your profile name or email address:

The screenshot shows the profile page for "Terry Marks" again. The "Edit Your Profile" button is highlighted with a red arrow. A modal dialog box titled "Edit your profile" is open in the center. It contains fields for "Full Name" (Terry Marks), "Username" (t\_marks\_63), "Email" ([REDACTED]), and "Language Preference" (English). At the bottom of the modal are "CANCEL" and "SAVE" buttons. The background of the page is dimmed to show the original profile information: Name (Terry Marks), Username (t\_marks\_63), Language Preference (English), Email ([REDACTED]), Organisation (Emma's test publisher - Sep 2024), and Role (admin).

# 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

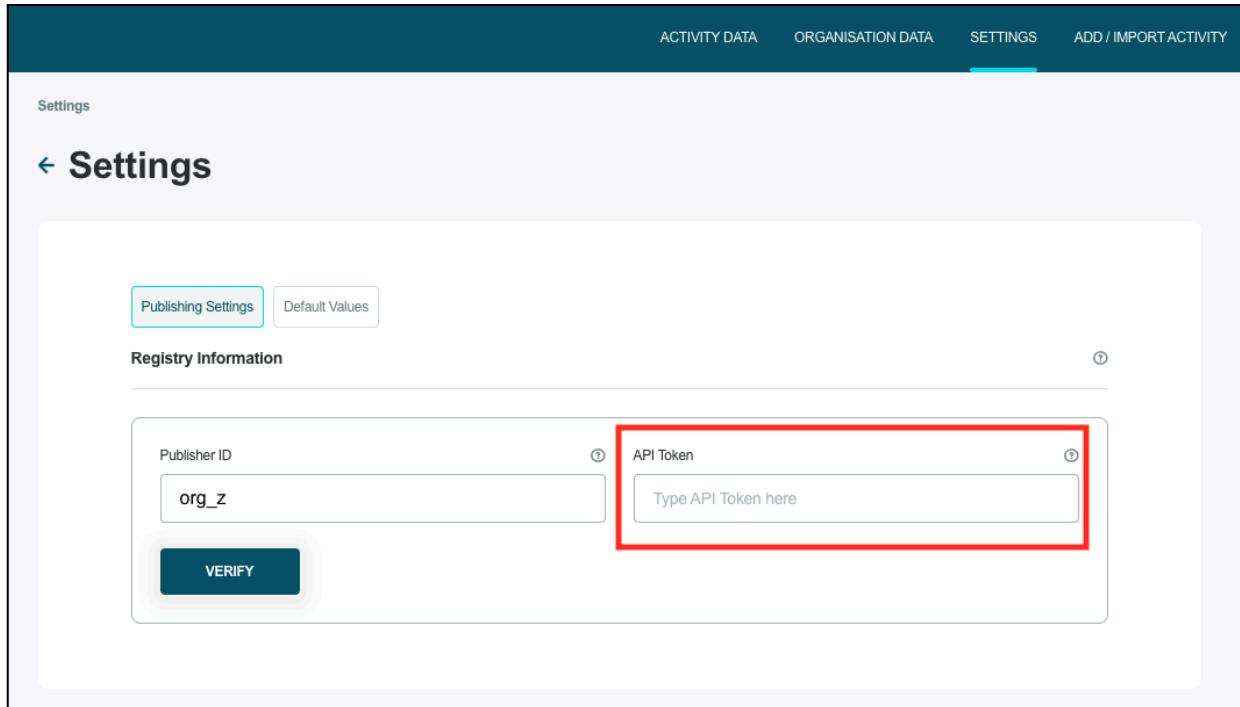
The screenshot shows the IATI Registry's user interface. At the top, there's a navigation bar with links for News, Events, Contact, and several menu items like ABOUT, IATI STANDARD, USING DATA, GUIDANCE & SUPPORT, and COMMUNITY. Below this is a secondary navigation bar with links for Home, Data, Publishers, Using IATI Data, Dashboard, About, API, Help, Sysadmin, My Data, **My Account** (which is highlighted with a red box), and Logout. The main content area shows a breadcrumb trail: / Users / emmaclegg. Below this are three buttons: Datasets, Activity Stream, and API Tokens (with a red arrow pointing to it). A "Manage" button is also present. A text box contains a note about API tokens being encrypted keys that need to be copied immediately. To the right is a decorative graphic of teal triangles.

This screenshot shows the 'Create API Token' form. It features three tabs at the top: Datasets, Activity Stream, and API Tokens (which is selected and highlighted with a red box). Below the tabs is a note about API tokens being encrypted keys that need to be copied immediately. A message below states that tokens can be regenerated if lost. A note at the bottom says to click a red X button to revoke access. The main form area has a field labeled 'Name:' with the value 'IATI Publisher API token' and a 'Create API Token' button. The entire form area is enclosed in a large red box.

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

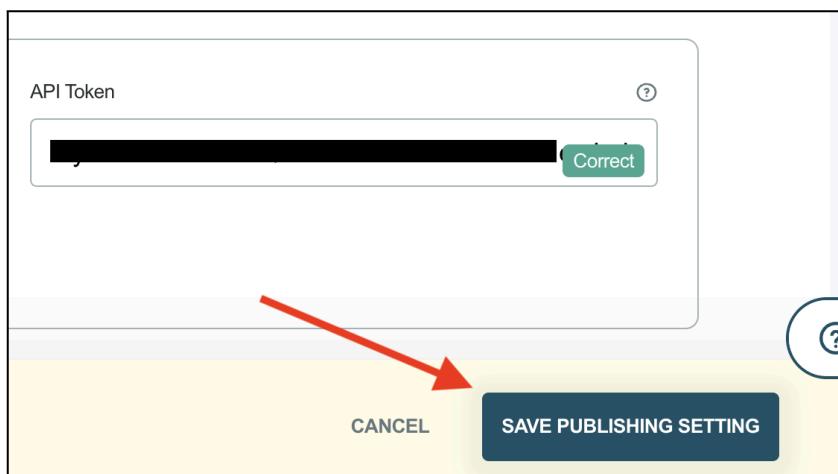


**3. Paste the API token copied from the IATI Registry into the “API token” box:**



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

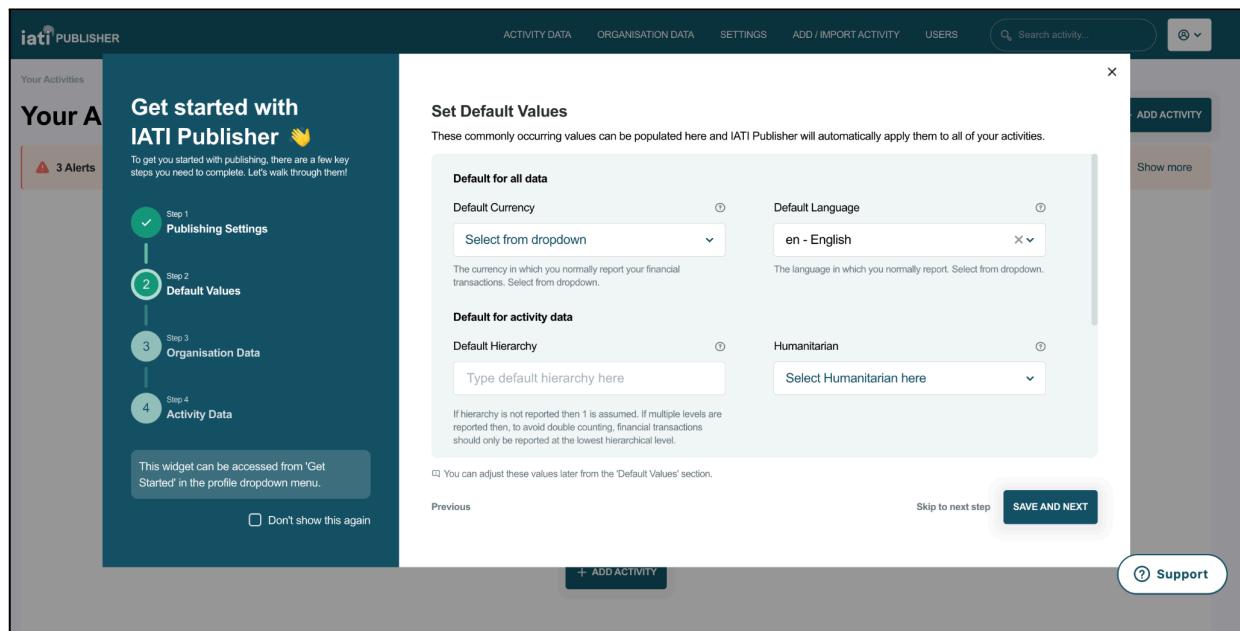
**5. Once your API token is correct, click on “Save Publishing Setting” to save your information:**



# 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](#).

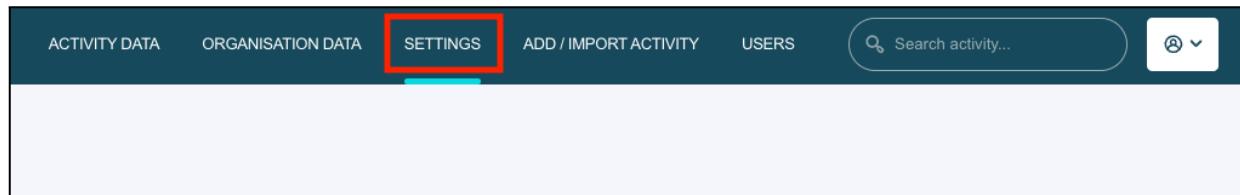
You will be prompted to complete default values in Step 2 of the "Get Started" guide:



The screenshot shows the IATI Publisher interface with a 'Get started with IATI Publisher' guide. Step 2, 'Default Values', is highlighted. A modal window titled 'Set Default Values' is open, containing fields for 'Default Currency' (dropdown menu) and 'Default Language' (selected as 'en - English'). Below these are sections for 'Default for activity data' (Default Hierarchy set to 'Humanitarian') and notes about adjusting values later.

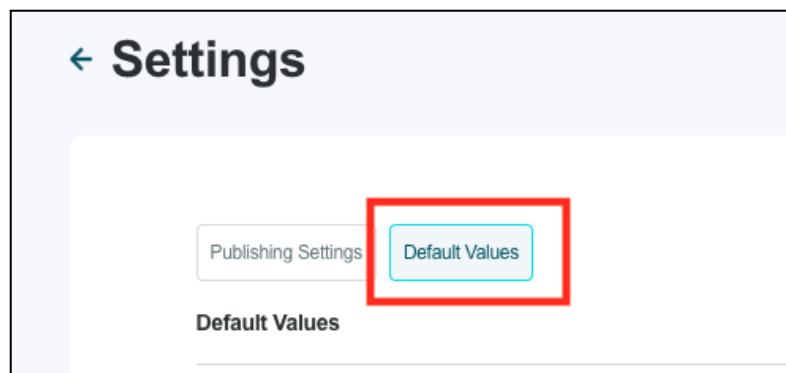
To view or change default values from the IATI Publisher main menu:

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



The screenshot shows the IATI Publisher main menu with the 'SETTINGS' tab highlighted by a red box. Other tabs include ACTIVITY DATA, ORGANISATION DATA, ADD / IMPORT ACTIVITY, and USERS. A search bar is also visible.

2. Select "Default Values":



The screenshot shows the 'Settings' page with a 'Default Values' button highlighted by a red box. Other buttons include 'Publishing Settings' and 'Default Values'.

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

← Settings

Publishing Settings Default Values

Default Values

Default for all data

Default Currency: GBP - Pound Sterling

Default Language: en - English

If you do not set your default currency, you have to choose and select currency manually for all the financial transactions.

If you do not set your default language, you have to choose and select language for all the narrative text in activity and organisation.

Recommended defaults for activity data

### 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:

← Settings

Recommended defaults for activity data

Default Hierarchy: 1

Humanitarian: Yes

If hierarchy is not reported then 1 is assumed. If multiple levels are reported then, to avoid double counting, financial transactions should only be reported at the lowest hierarchical level.

Default Flow Type: Select Default Flow Type here

Default Finance Type: Select Default Finance Type here

If selected, then default flow type will be automatically populated in activity when created.

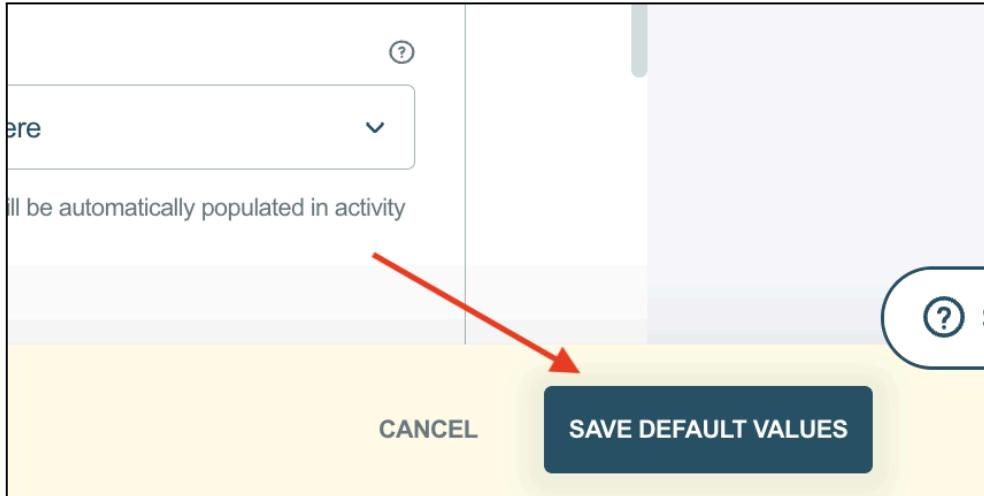
Default Aid Type: Select Default Aid Type here

Default Tied Status: Select Default Tied Status here

If selected, then default aid type will be automatically populated in activity when created. Also, Vocabulary type "OECD DAC" will be chosen by default.

CANCEL SAVE DEFAULT VALUES

## 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:

A screenshot of the IATI Publisher interface. The top navigation bar includes 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS', 'ADD / IMPORT ACTIVITY', 'USERS', a search bar, and a user profile icon. The main content area shows 'Your Activities / Example activity 2'. On the left, there's a 'Publishing Progress' circle at 18.75%, a note to 'Complete all core elements to get 100% score', and a 'Elements' section with 'Core' and 'Completed' status. In the center, there are tabs for 'Identification' and 'Basic Activity Information'. On the right, there are 'DELETE' and 'PUBLISH' buttons, and a red box highlights the ' OVERRIDE THIS ACTIVITY'S DEFAULT VALUES' link. A large red arrow points from the text in the previous step towards this link.

# 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:

The screenshot shows the IATI Publisher interface. On the left, a sidebar titled 'Get started with IATI Publisher' lists four steps: Step 1 Publishing Settings (completed), Step 2 Default Values (in progress), Step 3 Organisation Data (in progress), and Step 4 Activity Data (in progress). A note says this widget can be accessed from 'Get Started' in the profile dropdown menu. On the right, the 'Publish Organisation Data' form is displayed. It includes fields for 'reporting-org' (reference: CA-CC-6736289, type: 22 - National NGO), 'secondary-reporter' (set to False), and a note that values can be adjusted later. Buttons for 'Previous', 'Skip to next step', and 'PUBLISH AND NEXT' are at the bottom. A red arrow points from the 'Organisation Data' step in the sidebar to the 'ORGANISATION DATA' tab in the main menu.

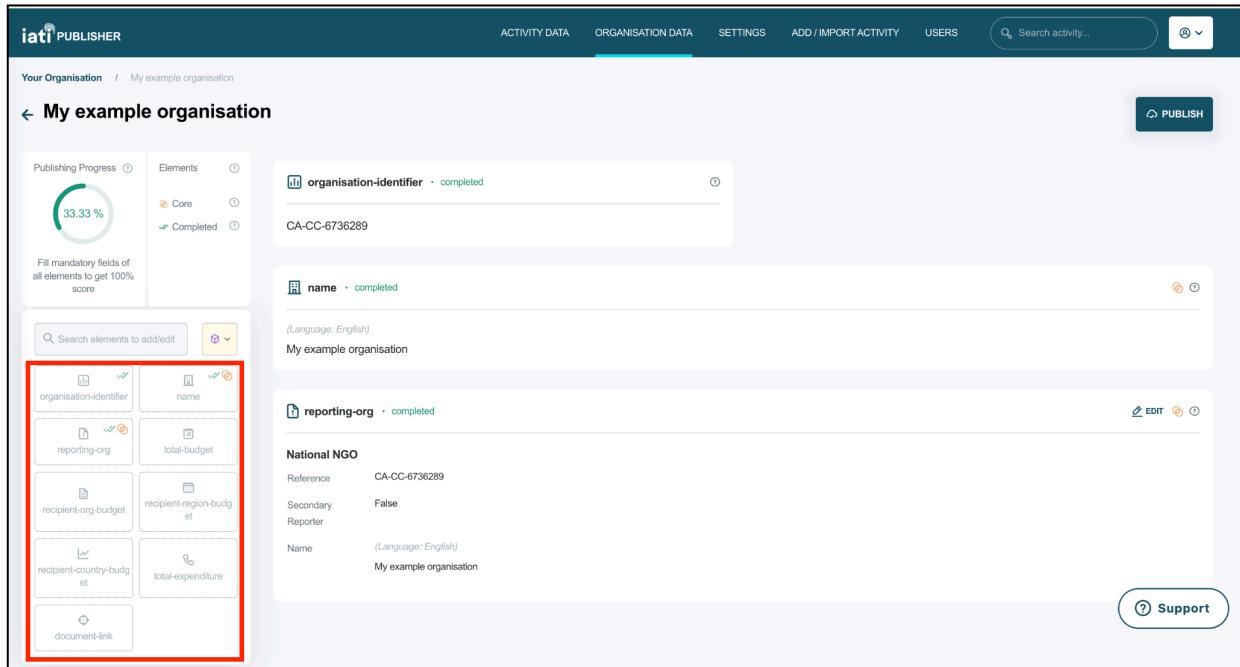
To view or edit organisation data from the IATI Publisher main menu:

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

The screenshot shows the IATI Publisher main menu. The 'ORGANISATION DATA' tab is highlighted with a red box and a red arrow pointing to it. Other tabs include 'ACTIVITY DATA', 'SETTINGS', and 'USERS'. Below the tabs, there's a section for 'My example organisation' showing publishing progress (33.33%), elements (Core, Completed), and an 'organisation-identifier' field with value CA-CC-6736289. A 'PUBLISH' button is visible on the right.

## 2. Select a data element to edit

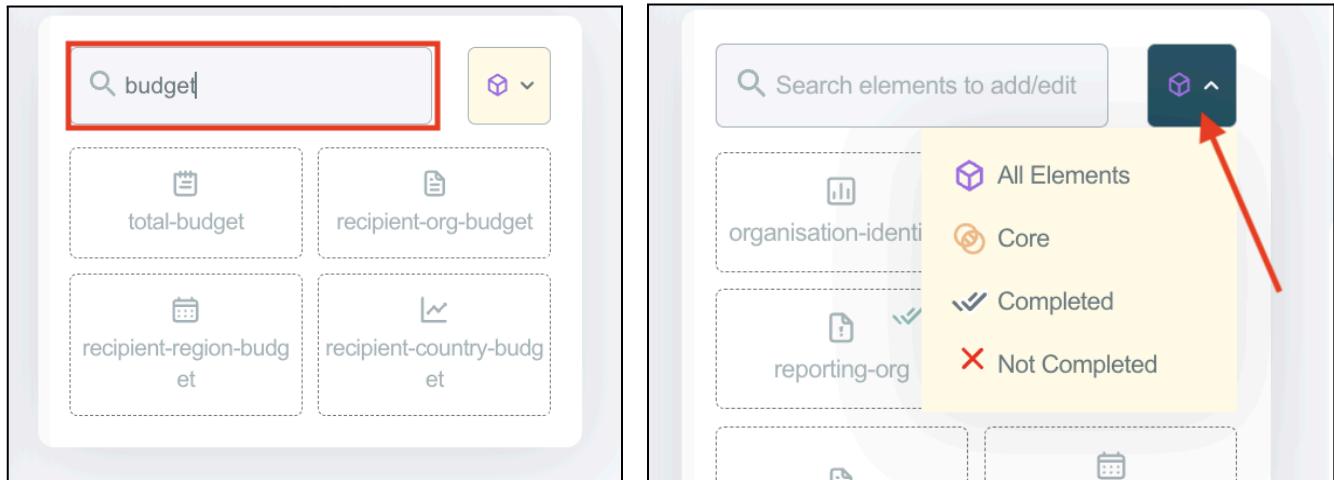
You can see a list of IATI elements in the left-hand menu on the Organisation Data page:



The screenshot shows the iati PUBLISHER platform's Organisation Data page. On the left, there's a sidebar with 'Publishing Progress' (33.33%) and a grid of 'Elements'. Some elements have a yellow ring icon indicating they are 'Core'. The main area shows the 'organisation-identifier' (value: CA-CC-6736289), 'name' (value: My example organisation), and 'reporting-org' section (value: National NGO, Reference: CA-CC-6736289, Secondary: False, Reporter: None, Name: My example organisation). A support button is visible at the bottom right.

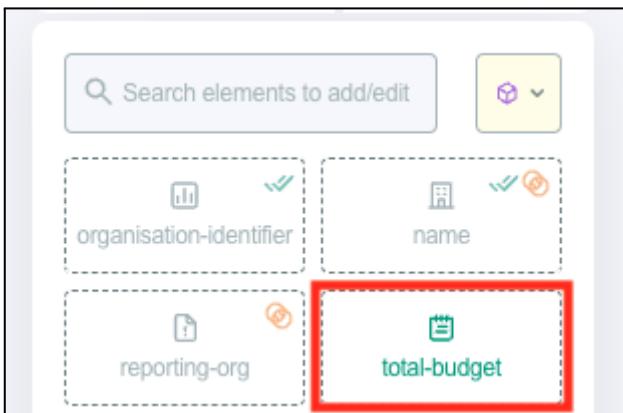
Some of these data elements are mandatory to populate and are labelled “core” (with a yellow ring symbol). Other elements are optional and can be populated if relevant.

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



The image contains two side-by-side screenshots of the iati PUBLISHER platform. The left screenshot shows a search bar with 'budget' typed in, and a list of data elements: 'total-budget', 'recipient-org-budget', 'recipient-region-budget', and 'recipient-country-budget'. The right screenshot shows a dropdown menu for filtering elements by completion status: 'All Elements' (selected), 'Core' (yellow ring icon), 'Completed' (green checkmark icon), and 'Not Completed' (red X icon). An arrow points to the 'Core' filter option.

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



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

A screenshot of a data entry form titled "total-budget". The form has a header with a back arrow and the title "total-budget". It includes a "Total Budget" section with a "Help" link. Below it are two main sections: "status" and "Period Start". The "status" section has a dropdown menu. The "Period Start" section has a required field "date \*" with a placeholder "yyyy-mm-dd" and a calendar icon. A red arrow points to the "Period Start" section.

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

A screenshot of a detailed data entry form for "Value". The form has a header with a back arrow and the title "Value". It includes a "Value" section with a required field "value \*" containing "5000" and a "currency \*" dropdown set to "GBP - Pound Sterling". Below it is a "value-date \*" field with the value "2024-10-01". At the bottom, there is a "Budget Line" section with a "( Optional )" note and a "ADD ADDITIONAL TOTAL BUDGET" button. The bottom right corner features a "SAVE AND EXIT" button with a red arrow pointing to it. Other buttons include "CANCEL" and "Help".

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

The screenshot shows the iati PUBLISHER interface with the 'Your Organisation' menu selected. The main area displays 'My organisation Z'. On the left, there's a publishing progress bar at 33.33% and a list of elements categorized as Core or Completed. The right side shows detailed information for each element. A red box highlights the 'reporting-org' section, which includes fields for Reference (GB-COH-1234), Secondary Reporter (False), and Name (My organisation Z). The 'organisation-identifier' and 'name' sections are also visible above it.

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

This screenshot is similar to the previous one, showing the 'My organisation Z' page. However, a red arrow points to the 'EDIT' icon located to the right of the 'reporting-org' section. This icon is enclosed in a red box, indicating where the user should click to edit the data. The rest of the interface, including the publishing progress bar and element list, remains the same.

# 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:

The screenshot shows the 'Your Organisation / My example organisation' page. On the left, there's a 'Publishing Progress' bar at 33.33% and a grid of 'Elements' with status indicators. The 'organisation-identifier' and 'name' elements are marked as 'completed'. The 'reporting-org' element is also marked as 'completed'. Other elements like 'total-budget', 'recipient-org-budget', 'recipient-region-budget', 'recipient-country-budget', and 'total-expenditure' are shown with incomplete status. A red box highlights the 'reporting-org' element. At the top right, there's a 'PUBLISH' button.

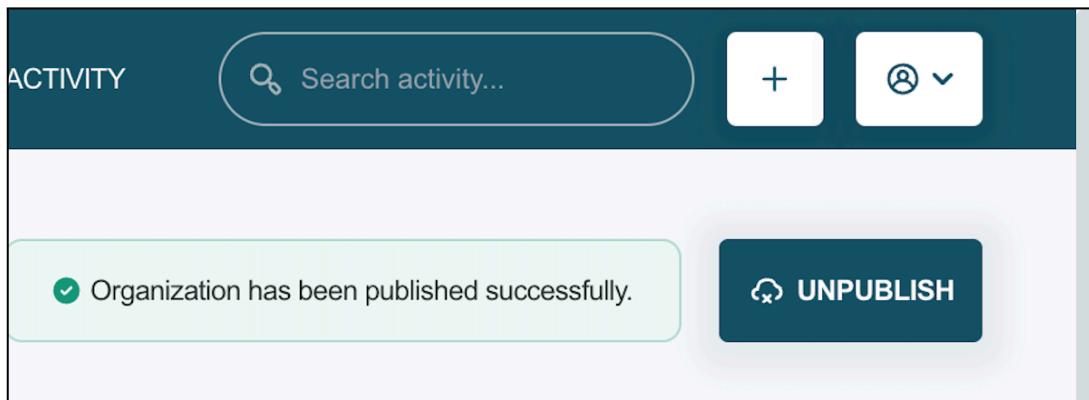
## 2. Click “Publish” in the top right of the screen:

The screenshot shows the same 'Your Organisation / My example organisation' page. The 'reporting-org' element is now listed as 'completed'. A large red arrow points to the 'PUBLISH' button at the top right, which is highlighted with a red border.

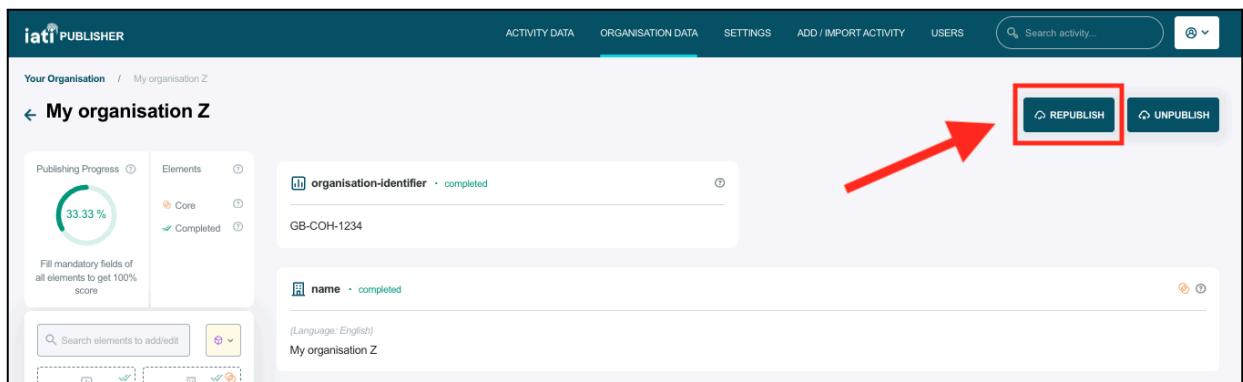
## 3. Click “Continue” after core element completeness has been checked:

A modal dialog box appears with the title 'Core Elements Complete'. It contains the message: 'Congratulations! All the core elements are complete. Continue to publish this organization.' At the bottom right of the dialog is a 'CONTINUE' button.

**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?

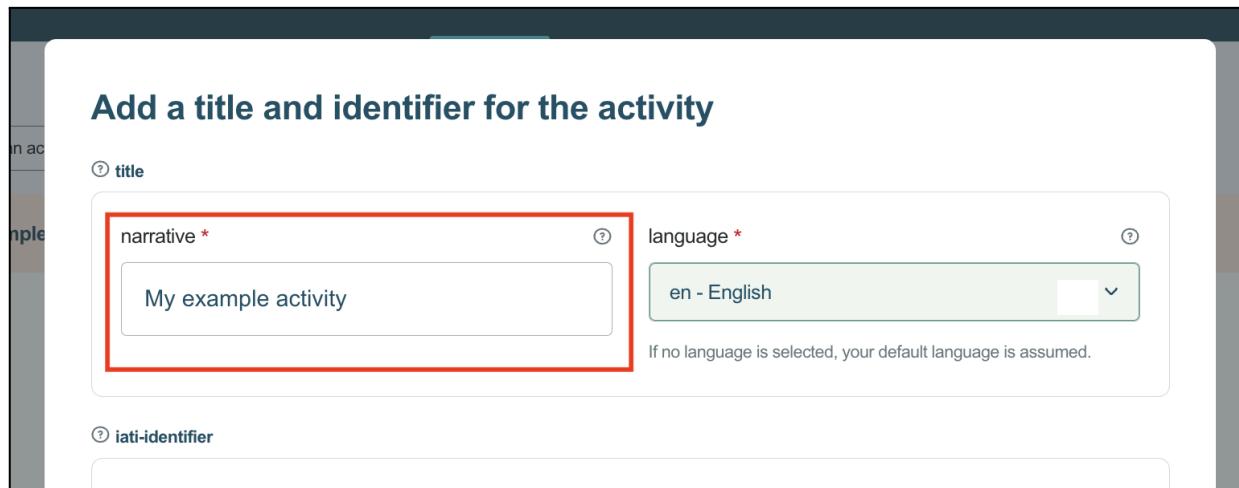
You can create activities individually in the IATI Publisher interface and enter information via data entry forms. If you want to add multiple activities at once, see the [section on bulk importing](#).

1. Click “Add/Import Activity” in the main menu
2. Select “Add Activity Manually”:



The screenshot shows the IATI Publisher interface. At the top, there's a navigation bar with 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS' (which has a red arrow pointing to it), 'ADD / IMPORT ACTIVITY', and 'USERS'. Below the navigation bar is a search bar with 'Search activity...'. The main area is titled 'Your Activities' and shows a list of activities with filters: 'All (64)', 'Published (11)', 'Ready for republishing (4)', and 'Draft (49)'. To the right of the list are buttons for 'IMPORT ACTIVITIES FROM .CSV/.XML', 'IMPORT ACTIVITIES FROM .XLS', 'DOWNLOAD ALL', and '+ ADD ACTIVITY'.

3. Enter a name for the activity in the title “narrative” field:



The screenshot shows a modal window titled 'Add a title and identifier for the activity'. It has two main input fields: 'title' (containing 'narrative \*' and 'My example activity') and 'language \*' (set to 'en - English'). There is also a note below the language field: 'If no language is selected, your default language is assumed.'

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

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

The screenshot shows the `iati-identifier` configuration screen. On the left, there is a red box around the "activity identifiers" input field, which contains the value "activity1". To the right, the "iati-identifier" field contains the value "CA-CC-6736289-activity1". Below these fields is a note: "Enter your own unique activity identifier such as abbreviation or simply a number. Make sure it is unique across all the activities. IATI Publisher will concatenate Organization Identifier and Activity Identifier to autogenerate 'iati-identifier'." At the bottom right are "CANCEL" and "SAVE" buttons, with "SAVE" being highlighted.

#### 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.

The screenshot shows the activity overview screen for "My example activity". The left sidebar lists publishing progress (18.75%), core elements (100%), and completed elements (0%). A red box highlights the "Elements" section. The main area shows the "Identification" tab selected, displaying the "iati-identifier" value "CA-CC-6736289-activity1". The "reporting-org" section shows "National NGO" with reference "CA-CC-6736289" and secondary reporter status "False". The "Name" field is populated with "My example organisation". A "PUBLISH" button is visible at the top right. A message at the top right says "Activity has been created successfully." A "Support" button is located in the bottom right corner.

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

The screenshot shows the iati PUBLISHER interface with the 'Your Activities' tab selected. In the center, the 'My example activity' page is displayed. On the left, there's a publishing progress bar at 18.75% and a grid of elements categorized as 'Core' or 'Completed'. The 'Identification' section is highlighted with a red border. It contains the 'iat-identifier' field with value 'CA-CC-6736289-activity1' and the 'reporting-org' field with value 'National NGO'. The 'reporting-org' field includes a note: 'Reporting Organisation data is managed via the Organisation Tab, except for value Secondary Reporter which can be managed at each activity.' A 'Support' button is visible on the right.

## 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:

This screenshot shows the same 'My example activity' page as above, but with a red box highlighting the 'Elements' sidebar. The 'Core' category is selected, indicated by a yellow ring icon. The main content area shows the 'reporting-org' field again, with its yellow ring highlighted.

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.

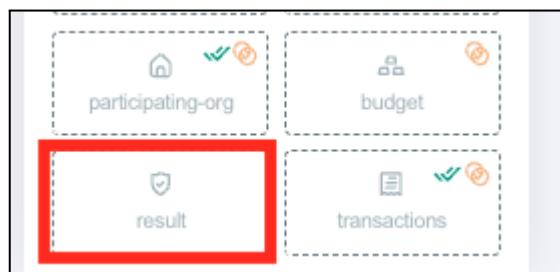
# How do I edit an existing activity?

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

The screenshot shows the 'Your Activities' page in the iati PUBLISHER interface. At the top, there are navigation tabs: ACTIVITY DATA (which is active), ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY, and USERS. There is also a search bar labeled 'Search activity...'. Below the tabs, there are filters: 'All (64)', 'Published (11)', 'Ready for republishing (4)', and 'Draft (49)'. The main area displays a table with columns: S.N., ACTIVITY TITLE, PUBLISHING PROGRESS, UPDATED ON, STATUS, and actions. The second row, which contains the activity titled 'Activity 4', is highlighted with a red box.

S.N.	ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON	STATUS	ACTION
1	test result data completeness (#1542)	43.75%	4 hours ago	published	<button>Unpublish</button>
2	Activity 4	81.25%	4 hours ago	published	<button>Unpublish</button>
3	Activity 7	100%	4 hours ago	published	<button>Unpublish</button>
4	Activity 10	62.5%	4 hours ago	published	<button>Unpublish</button>

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



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

The screenshot shows the 'result' data entry form. At the top, there are fields for 'type \*' (dropdown) and 'aggregation-status' (dropdown). Below this is a section for 'Title \*' with a text input field and a dropdown for 'language'. Further down are sections for 'narrative \*' (text input) and 'language' (dropdown). There are also optional sections for 'Description' and 'Document Link'.

\* Mandatory fields

type *	aggregation-status
Select type	Select aggregation status
Title * Type narrative Help	
narrative *	language
Type narrative	en - English If no language is selected, your default language is assumed.
+ ADD ADDITIONAL TITLE	
Description (Optional)	
Document Link Help (Optional)	

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:

Description ⓘ + Optional

narrative ⓘ

Type narrative

Help

language ⓘ

en - English

If no language is selected, your default language is assumed.

+ ADD ADDITIONAL DESCRIPTION

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

Description ⓘ ( Optional )

Document Link ⓘ ( Optional )

Reference ⓘ ( Optional )

CANCEL

SAVE AND EXIT

# 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.

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

The screenshot shows the 'Your Activities' section with a single activity titled 'My example activity'. The publishing progress is at 18.75%. On the right, there's a large 'PUBLISH' button with a red box around it and a red arrow pointing to it. A tooltip above the button reads 'OVERRIDE THIS ACTIVITY'S DEFAULT VALUES'.

- Click “Publish” for an activity in the activity list:

The screenshot shows the 'Your Activities' list page. It displays a table of activities with columns for S.N., ACTIVITY TITLE, PUBLISHING PROGRESS, UPDATED ON, and status (e.g., draft, published). For the second activity, a red arrow points to the 'Publish' button, which is highlighted with a red box.

S.N.	ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON	
1	Activity 4	81.25%	7 days ago	<span>draft</span> <a href="#">Unpublish</a> <a href="#">Republish</a>
2	test result data completeness (#1542)	43.75%	11 days ago	<span>draft</span> <a href="#">Publish</a> <a href="#">Unpublish</a> <a href="#">Republish</a>
3	Activity 7	100%	12 days ago	<span>draft</span> <a href="#">Unpublish</a> <a href="#">Republish</a>
4	Activity 10	62.5%	17 days ago	<span>draft</span> <a href="#">Unpublish</a> <a href="#">Publish</a>
5	Activity 2	62.5%	17 days ago	<span>published</span> <a href="#">Unpublish</a>

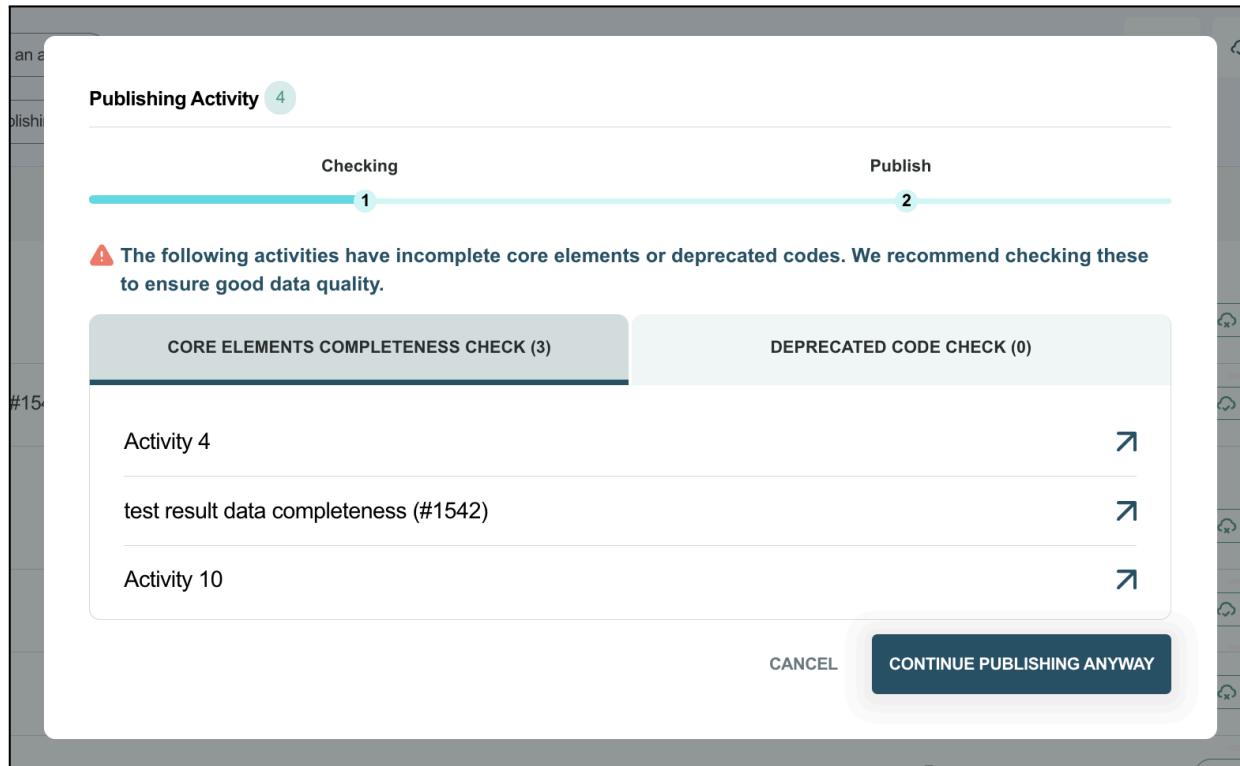
- c) Select and publish multiple activities at once from the activity list:

The screenshot shows the 'Your Activities' page in the iati PUBLISHER. At the top right, there is a button labeled 'PUBLISH SELECTED (4)'. To the left of this button, there is a dropdown menu icon and a '+ ADD ACTIVITY' button. Below the header, there are filters: 'All (64)', 'Published (7)', 'Ready for republishing (6)', and 'Draft (51)'. The main area displays a table with columns: S.N., ACTIVITY TITLE, PUBLISHING PROGRESS, UPDATED ON, and status (draft or published). Each row has a checkbox on its right. A red box highlights the checkboxes for the last four rows, corresponding to the 'PUBLISH SELECTED' count. A red arrow points from the text above to this 'PUBLISH SELECTED' button.

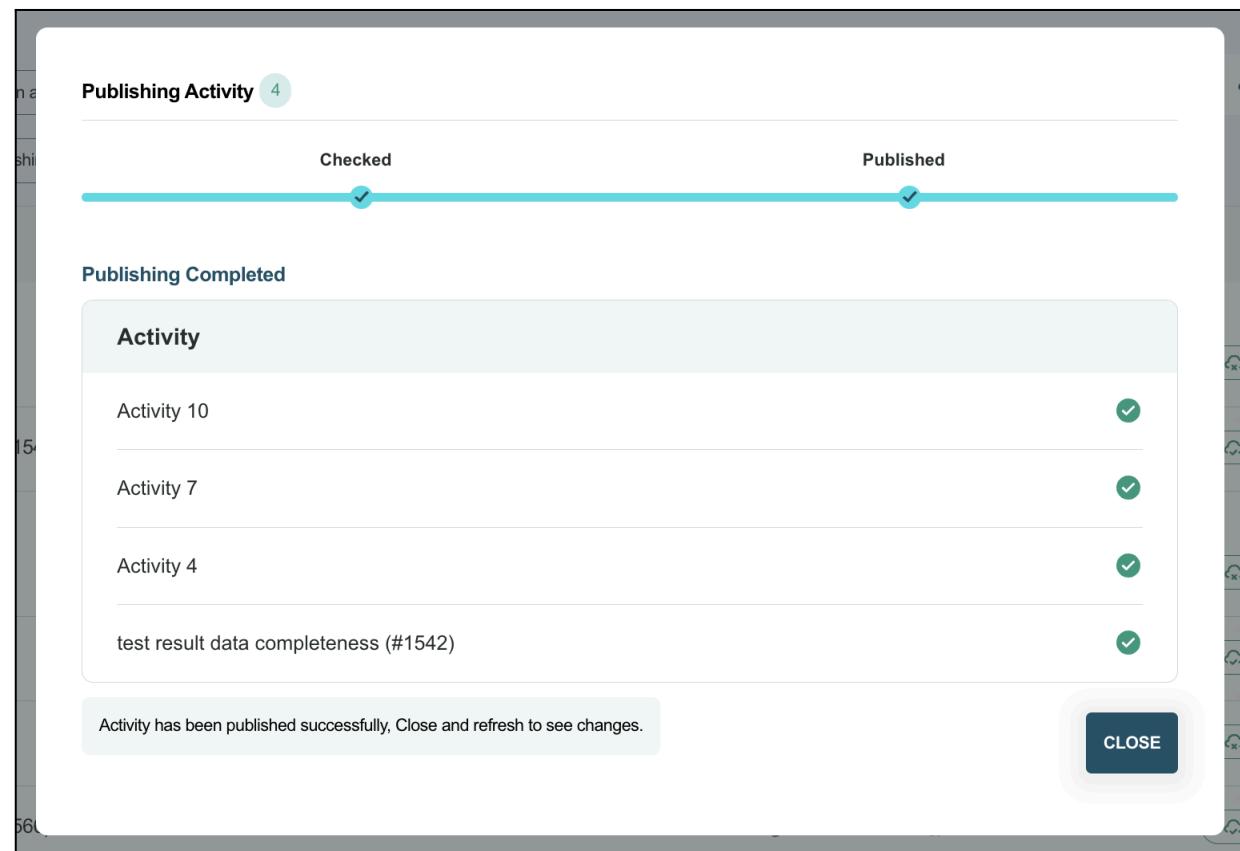
After clicking “publish”, activity data will be checked before publishing. You will be notified if there are missing core elements or possible data quality issues with your data:

The screenshot shows a modal window titled 'Publishing Activity' with a progress bar at the top. The progress bar has two stages: 'Checking' (step 1) and 'Publish' (step 2). A warning message below the progress bar states: '⚠ The following activities have incomplete core elements or deprecated codes. We recommend checking these to ensure good data quality.' Below this message, there are two sections: 'CORE ELEMENTS COMPLETENESS CHECK (3)' and 'DEPRECATED CODE CHECK (0)'. Under the first section, three activities are listed: 'Activity 4', 'test result data completeness (#1542)', and 'Activity 10', each with a right-pointing arrow icon. At the bottom of the modal, there are two buttons: 'CANCEL' on the left and 'CONTINUE PUBLISHING ANYWAY' on the right, which is highlighted with a blue background.

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:

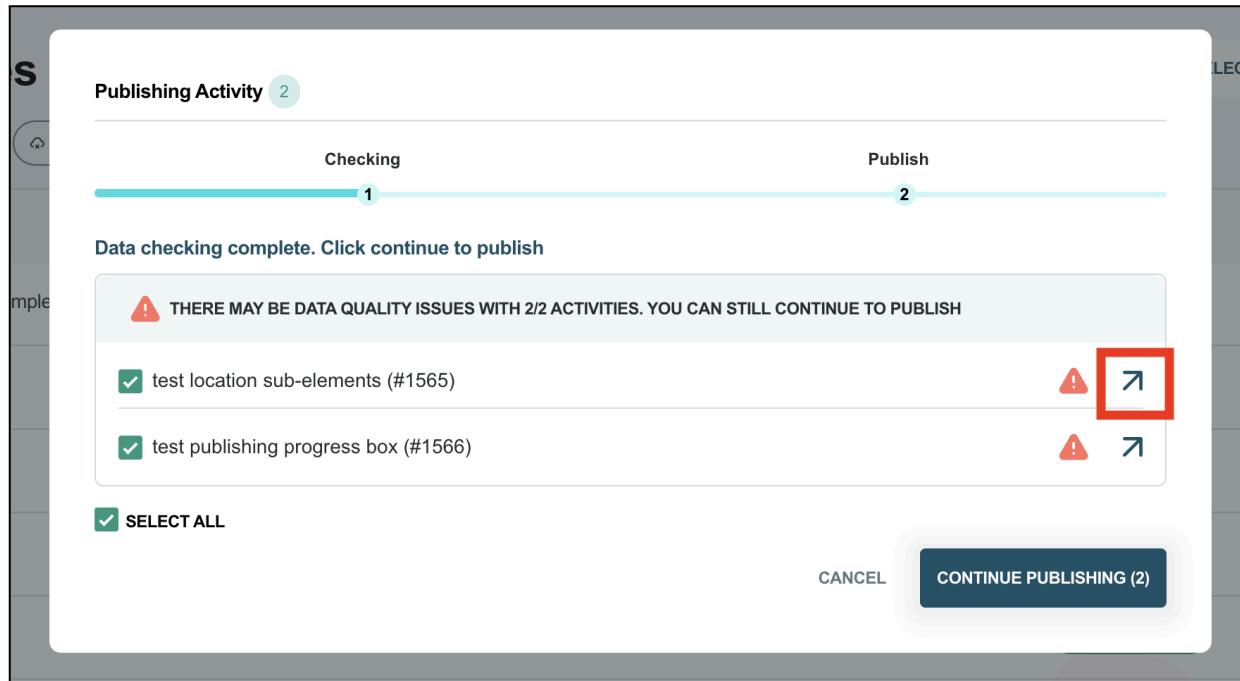


# How do I fix data quality issues?

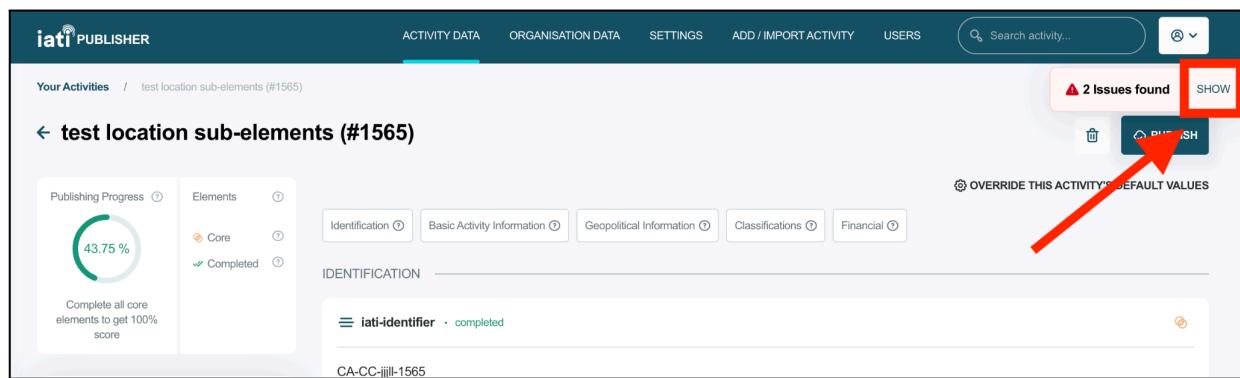
IATI Publisher checks your activity data against the [IATI Validator](#) before it is published. This feedback helps you correct issues and gaps in your data that may affect its usability.

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.

The screenshot shows a modal window titled "IATI Validator Issues". It contains two sections: "1 Errors" and "1 Critical".

- 1 Errors:** A red exclamation mark icon. Description: "Each activity must have a specified sector, either at activity level OR for all transactions."
- 1 Critical:** A purple exclamation mark icon. Description: "Element 'other-identifier': This element is not expected. Expected is ( description )."

### 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.

The screenshot shows the same modal window as before, but the "1 Critical" message is now highlighted with a thick red border.

- 1 Errors:** A red exclamation mark icon. Description: "Each activity must have a specified sector, either at activity level OR for all transactions."
- 1 Critical:** A purple exclamation mark icon. Description: "Element 'other-identifier': This element is not expected. Expected is ( description )."

# 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:

The screenshot shows the 'Your Activities' page with three listed activities:

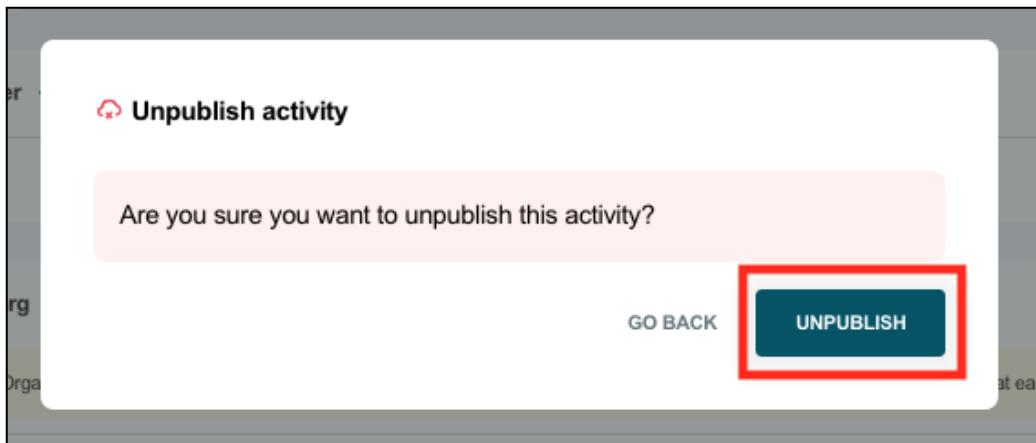
S.N	ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON	STATUS	Actions
1	Activity 4	81.25%	2 days ago	draft	<a href="#">Unpublish</a> <a href="#">Republish</a>
2	test result data completeness (#1542)	43.75%	3 days ago	published	<a href="#">Unpublish</a>
3	Activity 7	100%	3 days ago	published	<a href="#">Unpublish</a>

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

The screenshot shows the detail view for activity #1542. At the top right, there is a prominent 'UNPUBLISH' button with a red box around it.

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

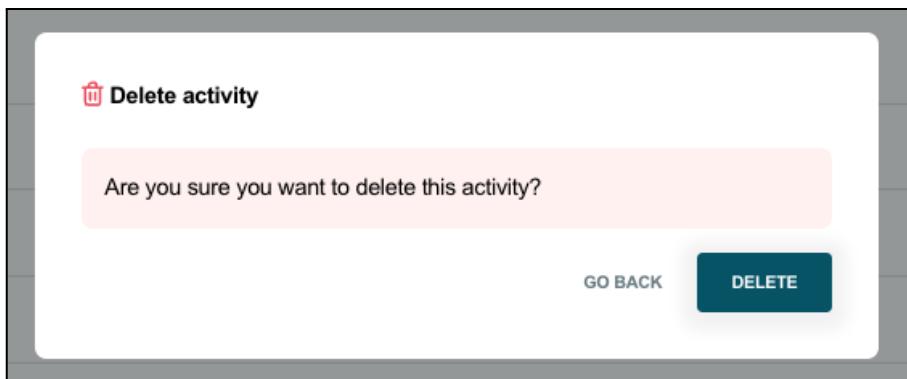
This will remove the activity from your public data and leave it in the IATI Publisher interface in draft state. It is easy to republish the activity if needed.



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”:

A screenshot of the IATI Publisher "Your Activities" page. The page has a dark header with the IATI logo and navigation links like ACTIVITY DATA, ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY, and USERS. A search bar is at the top right. Below the header is a section titled "Your Activities" with a sub-section "Previously Published on IATI". There is a table with columns: S.N, ACTIVITY TITLE, PUBLISHING PROGRESS, UPDATED ON, and status (draft, published). Each row has "Unpublish" and "Republish" buttons. To the right of the table are buttons for "PUBLISH SELECTED (1)", a trash icon, and "+ ADD ACTIVITY". A red arrow points to the trash icon. In the bottom right corner of the table area, there is a red box around a checked checkbox.

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



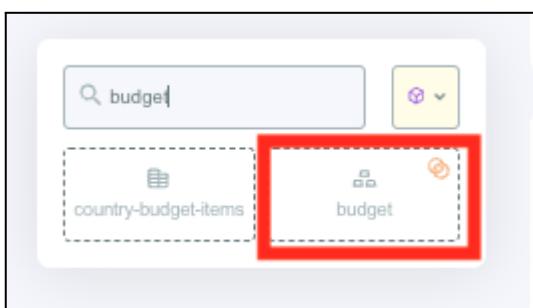
# Budgets and transactions

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

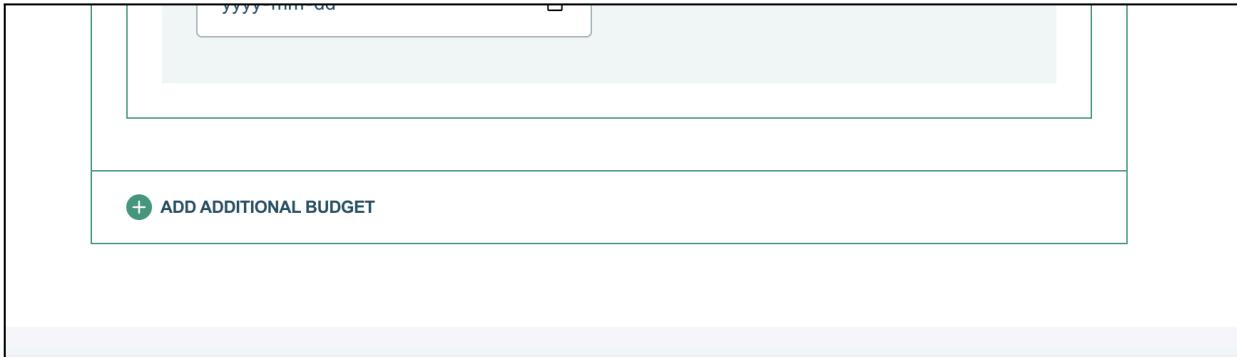


2. Enter information in the budget data entry form

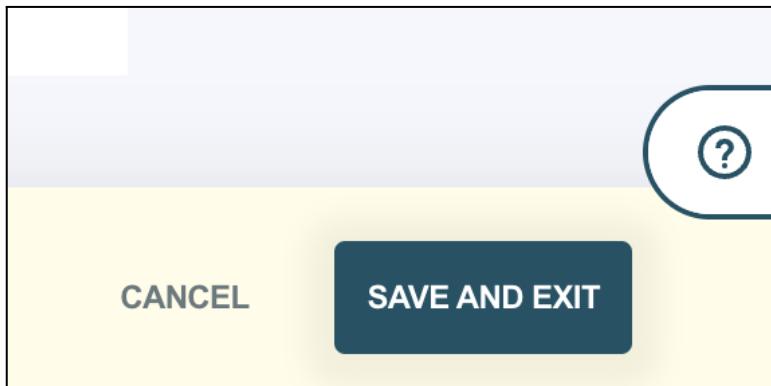
Mandatory fields are marked with red asterisks (period start, period end and budget value):

The screenshot shows the 'Add Budget for My example activity' form. At the top, there's a breadcrumb navigation: 'Your Activities / My example activity / Budget'. Below that is a back-link '← Add Budget for My example activity'. The main form area has a title 'Budget' with a help link. It contains several input fields: 'status' (dropdown with 'Select status'), 'type' (dropdown with 'Select type'), 'Period Start' (marked with a red asterisk), and 'iso date' (marked with a red asterisk). A note at the top right indicates that 'Period Start' and 'iso date' are mandatory fields. The entire form is enclosed in a light blue border.

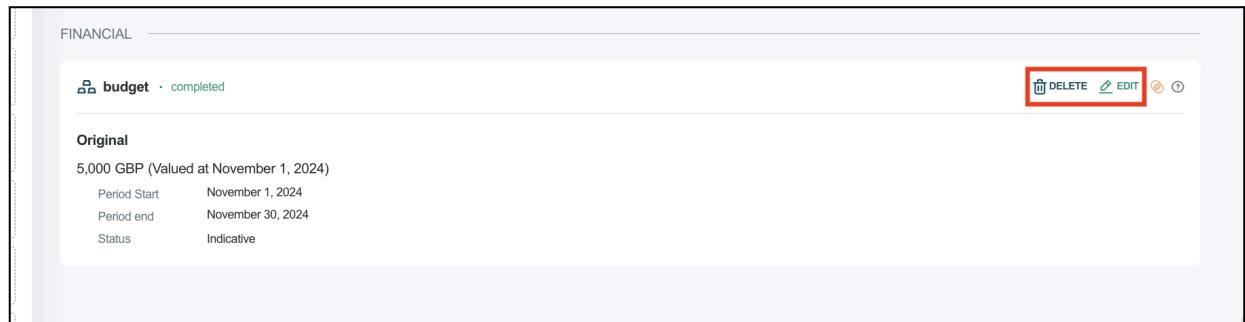
You can enter multiple budgets by clicking “Add Additional Budget” at the bottom:



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:

The screenshot shows the 'My example activity' detail page. On the left, there's a 'Publishing Progress' section with a 25% completion bar and a note to complete core elements for 100% score. Below it is a search bar with 'transaction' typed in and a 'transactions' button highlighted with a red box. On the right, there's a sidebar with sections like 'IDENTIFICATION', 'iati-identifier', 'CA-CC-6730', 'reporting', 'Report', and 'National NGOs'.

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](#))

The screenshot shows the 'Add Transaction for My example activity' data entry form. It includes fields for 'reference' (with a dropdown for 'humanitarian'), 'Transaction Type' (with a dropdown for 'code'), and 'Transaction Date' (with a dropdown for 'date'). A yellow banner at the bottom has 'CANCEL' and 'SAVE AND EXIT' buttons. A watermark '©' is visible in the bottom right corner.

There are expandable optional fields:

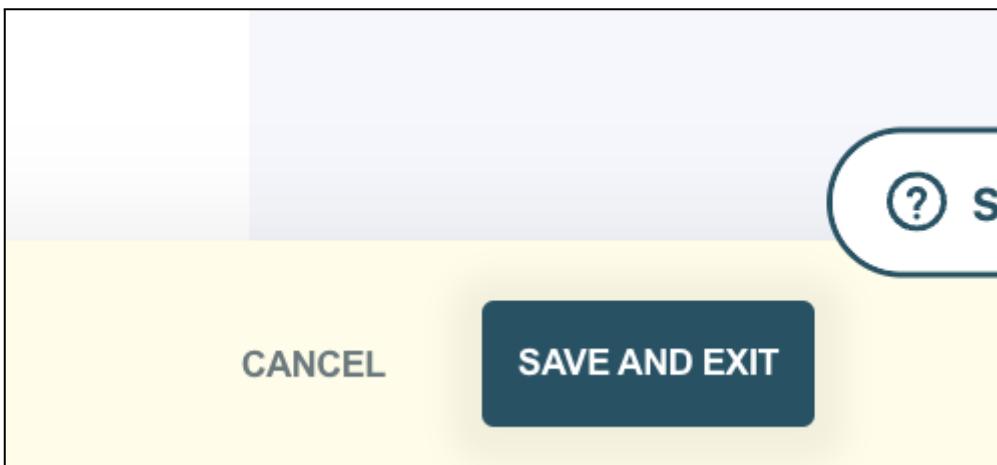
The screenshot shows a section of a transaction data entry form. At the top left, there is a field labeled "Description" with a help icon and the text "(Optional)". Below it is a "narrative" field containing a text input box with placeholder text "Type narrative" and a "language" dropdown menu set to "en - English". A note below the language field states: "If no language is selected, your default language is assumed." To the right of the language dropdown is a help icon. At the bottom of this section is a green button labeled "+ ADD ADDITIONAL DESCRIPTION" with a plus sign icon.

Below this section are three collapsed dropdown menus, each with a header and a help icon:

- Provider Organisation** Help (Optional)
- Receiver Organisation** Help (Optional)
- Disbursement Channel** Help (Optional)

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:

The screenshot shows the 'Transaction detail' page for transaction R1001. The left sidebar lists various transaction fields: reference, humanitarian, transaction\_type, transaction\_date, value, description, provider\_organization, receiver\_organization, disbursement\_channel, sector, recipient\_country, recipient\_region, flow\_type, finance\_type, and aid\_type. The main content area displays the following details for transaction R1001:

reference	transaction-type	value	description	provider-organization
R1001	Disbursement	500 GBP valued at October 09, 2024	N/A	Organisation Identifier Code: N/A Description: N/A

At the top right, there is an 'EDIT TRANSACTION' button and a support link. At the bottom right, there is a 'Support' button.

#### 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:

The screenshot shows the 'Transaction List' page. The header includes the 'ACTIVITY DATA' tab, search bar, and other navigation links. A blue button labeled '+ ADD TRANSACTION' is visible. The table below lists one transaction:

INTERNAL REF	TRANSACTION TYPE	TRANSACTION VALUE	TRANSACTION DATE	ACTION
R1001	Disbursement	500	a month ago	

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

The screenshot shows the 'Transaction List' page again. The 'ACTIVITY DATA' tab is active. A red box highlights the 'Transaction List' link in the breadcrumb navigation. The table below lists the same transaction as before:

INTERNAL REF	TRANSACTION TYPE	TRANSACTION VALUE	TRANSACTION DATE	ACTION
R1001	Disbursement	500	a month ago	

# 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:

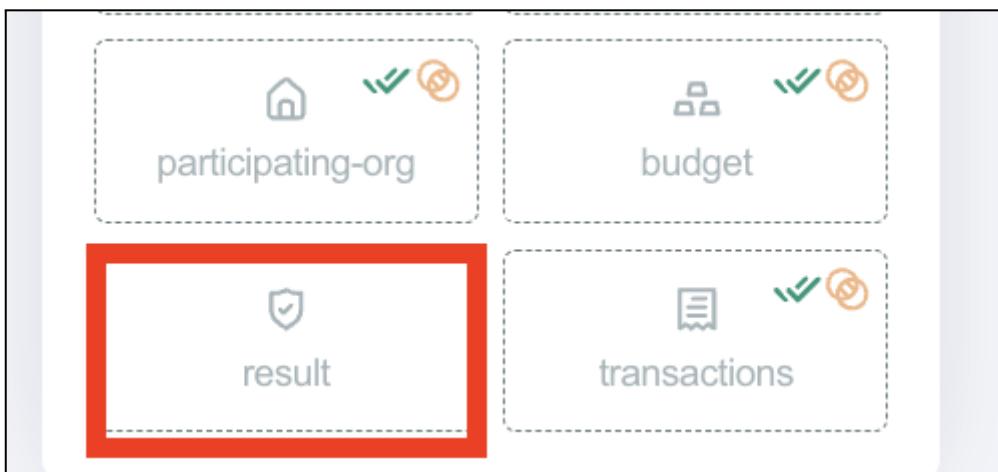
**Your Activities** What is an activity?

All (64) Published (11) Ready for republishing (4) Draft (49)

S.N	ACTIVITY TITLE	PUBLISHING PROGRESS
1	test result data completeness (#1542)	43.75%
2	Activity 4	81.25%
3	Activity 4	100%



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



### 3. Complete the data entry form:

result Help ⓘ

\* Mandatory fields

type *	aggregation-status
Select type	Select aggregation status
Help	Help

Title \* ⓘ

narrative *	language
Type narrative	en - English
Help	If no language is selected, your default language is assumed.

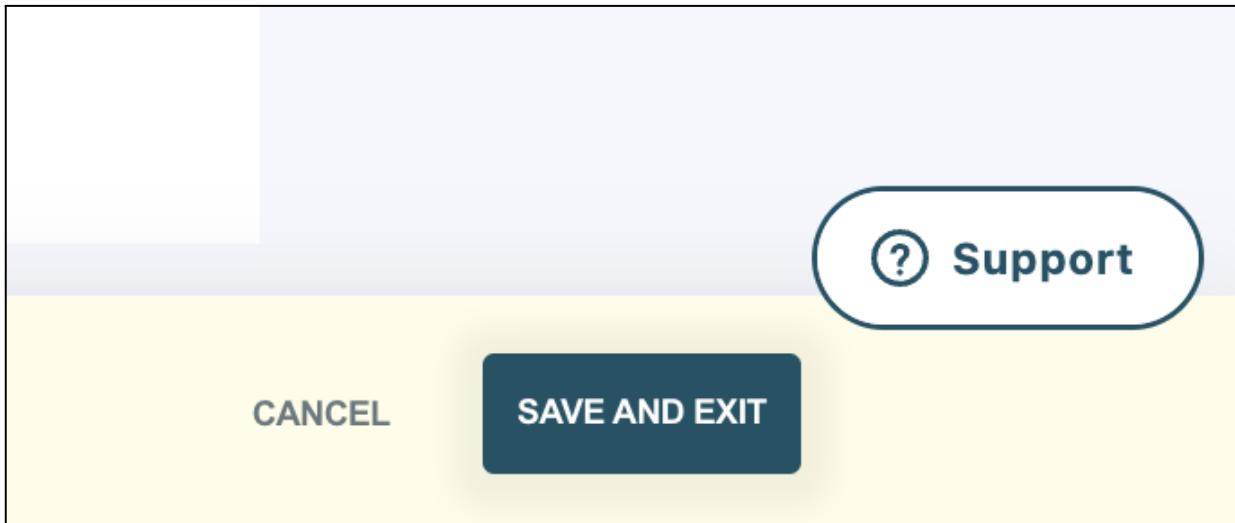
+ ADD ADDITIONAL TITLE

Description ⓘ (Optional)

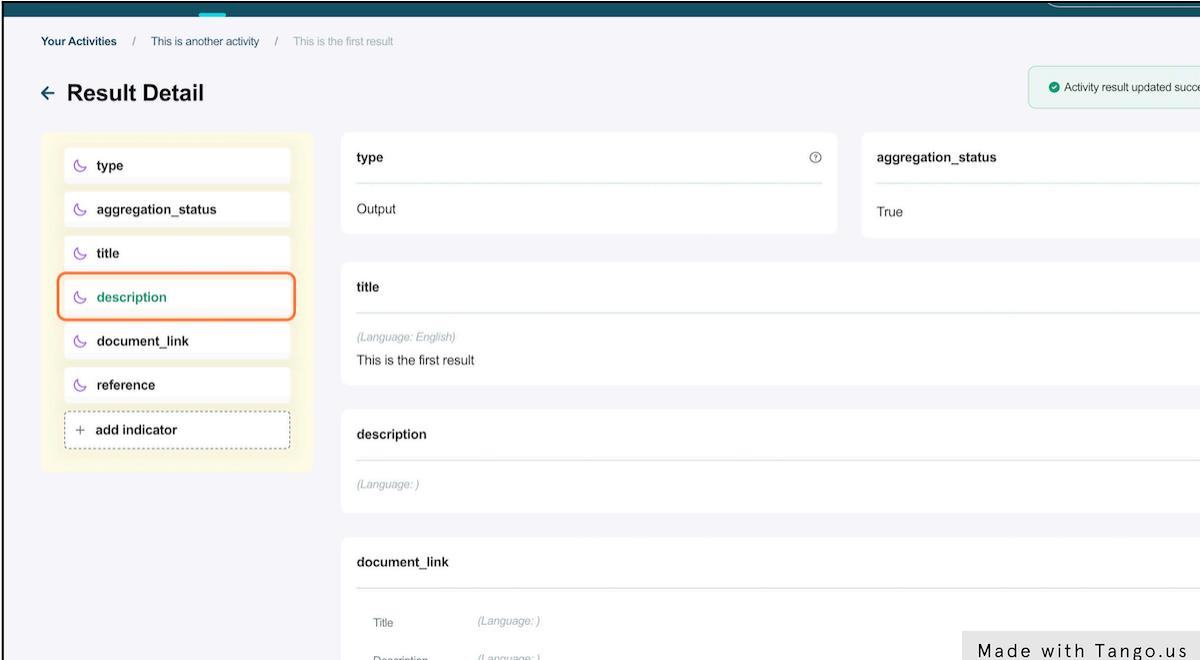
Document Link Help ⓘ (Optional)

Reference Help ⓘ (Optional)

### 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.



This screenshot shows the 'Result Detail' page. On the left, there is a sidebar with a yellow background containing a list of sub-elements: type, aggregation\_status, title, description, document\_link, and reference. The 'description' item is highlighted with a red box. The main content area displays the following fields:

- type**: Output
- aggregation\_status**: True
- title**: This is the first result
- description**: (Language: English) This is the first result
- document\_link**: Title (Language: ) Description (Language: )

A green banner at the top right indicates: 'Activity result updated successfully'. A watermark 'Made with Tango.us' is visible in the bottom right corner.

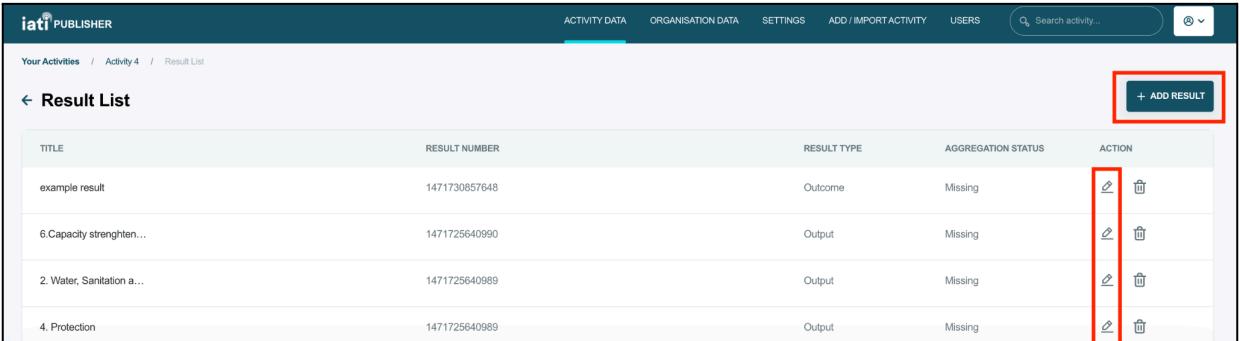
##### 5. Click on back button to go to the list of results:



This screenshot shows the 'Result Detail' page with the back button highlighted by a red box. The page header reads 'Your Activities / Activity 4 / example result'. The main content area displays the following information:

- Result Detail**
- Result Number:** 1471730857648

Results can be edited or added from the Results List:



This screenshot shows the 'Result List' page. The top navigation bar includes links for ACTIVITY DATA, ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY, and USERS, along with a search bar. The main content area displays a table of results with the following columns: TITLE, RESULT NUMBER, RESULT TYPE, AGGREGATION STATUS, and ACTION. The 'ACTION' column contains edit and delete icons. A red box highlights the '+ ADD RESULT' button in the top right corner of the table header. The table data is as follows:

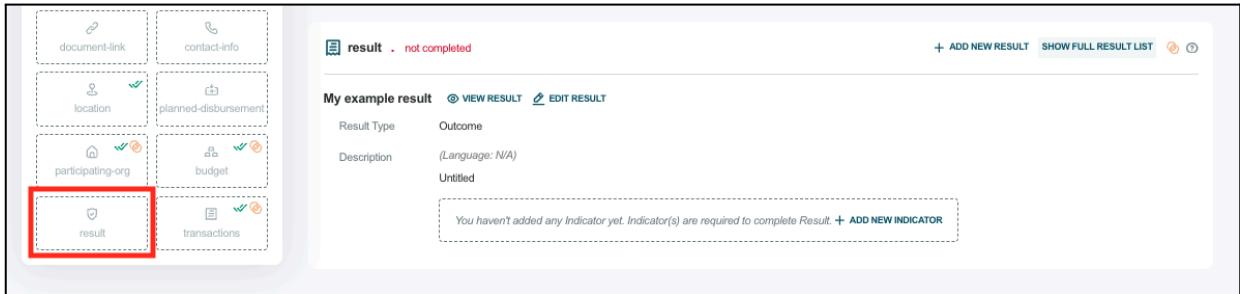
TITLE	RESULT NUMBER	RESULT TYPE	AGGREGATION STATUS	ACTION
example result	1471730857648	Outcome	Missing	
6.Capacity strengthen...	1471725640990	Output	Missing	
2. Water, Sanitation a...	1471725640989	Output	Missing	
4. Protection	1471725640989	Output	Missing	

# 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



The screenshot shows a user interface for managing results. On the left, there is a grid of icons representing different data types: document-link, contact-info, location, planned-disbursement, participating-org, budget, result, and transactions. The 'result' icon is highlighted with a red box. On the right, the main panel displays a result titled 'My example result'. It includes fields for 'Result Type' (Outcome), 'Description' (Language: N/A), and 'Untitled'. A message at the bottom states: 'You haven't added any Indicator yet. Indicator(s) are required to complete Result.' followed by a link '+ ADD NEW INDICATOR'.

## 2. Click “Add new indicator” against the result that you want to add an indicator for



This screenshot shows the same 'result' page as above, but with the 'result' item selected. The '+ ADD NEW INDICATOR' button is highlighted with a red box. The rest of the interface is identical to the first screenshot.

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

The screenshot shows the 'Indicator' data entry form. At the top, there are dropdown menus for 'measure \*' (set to '2 - Percentage') and 'ascending'. Below these are sections for 'aggregation status' and 'Title \*'. The 'Title' section contains a 'narrative \*' field ('% of market share') and a 'language \*' field ('en - English'). A note states: 'If no language is selected, your default language is assumed.' There is also a link to '+ ADD ADDITIONAL TITLE'. A 'Description' field is present but optional. At the bottom right are 'CANCEL' and 'SAVE AND EXIT' buttons.

### 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:

The screenshot shows the 'Indicator Detail' page for the indicator '% of market share'. On the left, there is a sidebar with dropdown menus for 'measure', 'ascending', 'aggregation\_status', 'title \*', 'description', 'document\_link', 'reference', and 'baseline'. At the bottom of this sidebar is a button '+ add period'. To the right, the main content area displays the indicator's details: Title (% of market share), Measure (Percentage), Aggregation Status (N/A), Description (N/A), Reference (N/A), and Baseline (N/A). The text '(Language: English)' is shown next to the title. At the top right of the content area are three buttons: '+ ADD INDICATOR', '+ ADD PERIOD', and 'EDIT INDICATOR', all enclosed in red boxes. The top navigation bar includes links for 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS', 'ADD / IMPORT ACTIVITY', 'USERS', and a search bar.

## 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.

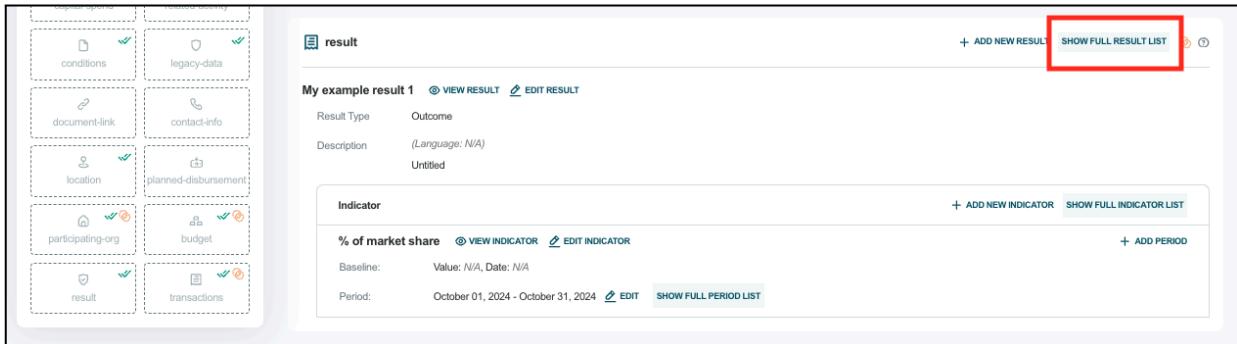
You can add a period from the Indicator Detail page (top screenshot), or from the activity detail page (bottom screenshot):

The image contains two screenshots of the iati PUBLISHER interface. The top screenshot shows the 'Indicator Detail' page for an indicator titled '% of market share'. On the right side, there are three buttons: '+ ADD INDICATOR', '+ ADD PERIOD' (which is highlighted with a red box and a red arrow pointing to it), and 'EDIT INDICATOR'. The bottom screenshot shows the 'Activity Detail' page for a result titled 'My example result 1'. On the right side, there are three buttons: '+ ADD NEW RESULT', 'SHOW FULL RESULT LIST', '+ ADD INDICATOR' (which is highlighted with a red box and a red arrow pointing to it), and '+ ADD PERIOD' (which is also highlighted with a red box and a red arrow pointing to it). Both screenshots show various configuration options and data entries for the indicator or result.

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

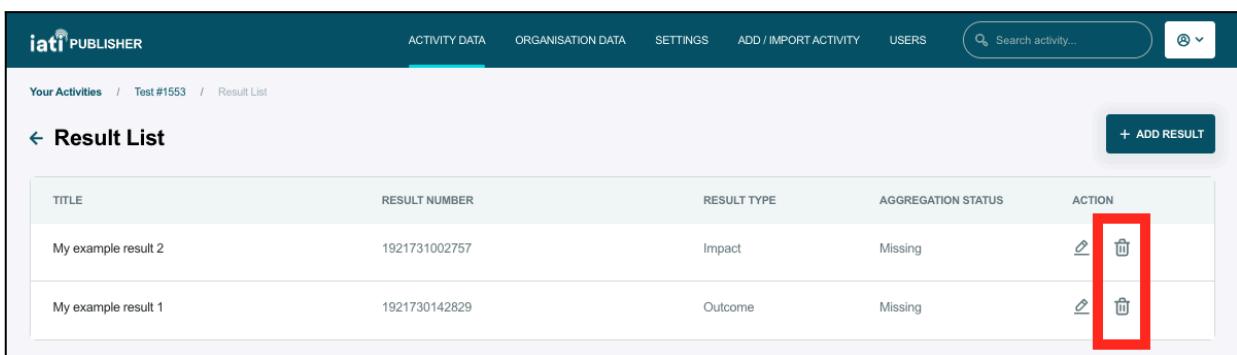
Deleting a result in the interface will delete any indicators or periods associated with it.

## 1. Click on “Show full result list”



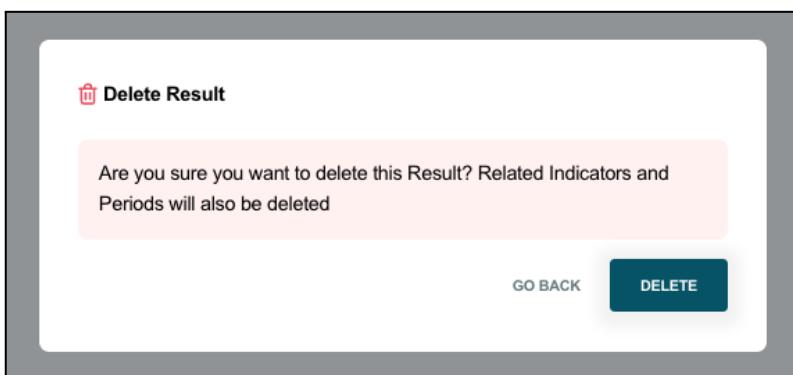
The screenshot shows a 'result' page with a sidebar containing various icons for conditions, legacy-data, document-link, contact-info, location, planned-disbursement, participating-org, budget, result, and transactions. The main content area displays a result titled 'My example result 1'. It includes fields for Result Type (Outcome), Description (Language: N/A, Untitled), and an Indicator section for '% of market share'. The indicator has Baseline and Period fields. Buttons for '+ ADD NEW RESULT', 'SHOW FULL RESULT LIST', '+ ADD NEW INDICATOR', and 'SHOW FULL INDICATOR LIST' are visible. A red box highlights the 'SHOW FULL RESULT LIST' button.

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



The screenshot shows a 'Result List' page with a header for 'Your Activities / Test #1553 / Result List'. It features a search bar and a '+ ADD RESULT' button. The list contains two entries: 'My example result 2' and 'My example result 1'. Each entry has an edit icon (pencil) and a delete icon (trash can). A red box highlights the delete icon for 'My example result 1'.

## 3. Confirm deletion:



The screenshot shows a modal dialog box with the title 'Delete Result'. It contains a message: 'Are you sure you want to delete this Result? Related Indicators and Periods will also be deleted'. At the bottom are 'GO BACK' and 'DELETE' buttons. A red box highlights the 'DELETE' button.

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:

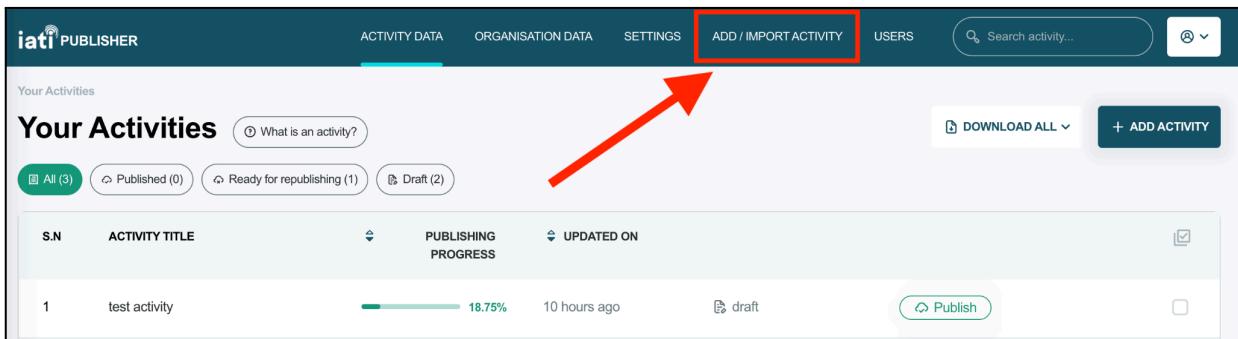
The screenshot shows the 'result' detail page for 'My example result 1'. At the top right, there are buttons for '+ ADD NEW RESULT', 'SHOW FULL RESULT LIST', and a help icon. Below this, the result type is listed as 'Outcome' with a note '(Language: N/A)'. The description is 'Untitled'. In the 'Indicator' section, there is one item: '% of market share' with a value of 'N/A' and a date of 'N/A'. Below this, the period is listed as 'October 01, 2024 - October 31, 2024'. At the bottom right of the indicator section, there is a red box around the 'SHOW FULL INDICATOR LIST' button. To the right of the indicator section, there is a '+ ADD NEW INDICATOR' button and a '+ ADD PERIOD' button.

# 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.

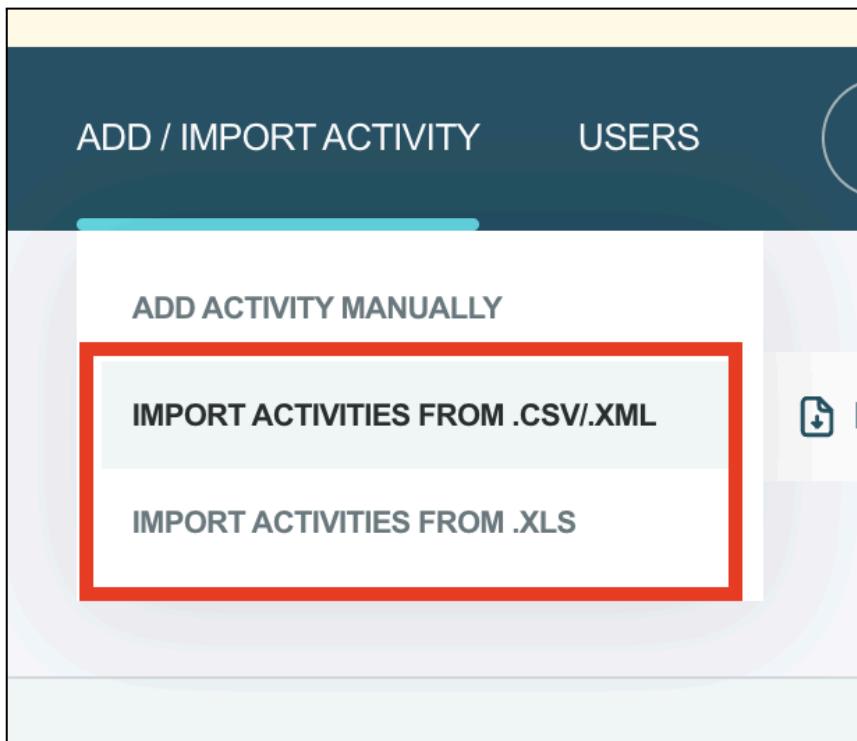
## How do I import activity data?

1. Click “Add / Import Activity” in the main menu:



The screenshot shows the IATI Publisher dashboard. At the top, there are several navigation tabs: ACTIVITY DATA (which is underlined), ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY (which is highlighted with a red box and has a red arrow pointing to it), and USERS. There is also a search bar labeled "Search activity..." and a user dropdown icon. Below the tabs, there's a section titled "Your Activities" with a sub-section "Your Activities". It includes filters for "All (3)", "Published (0)", "Ready for republishing (1)", and "Draft (2)". A table below lists one activity: "test activity" with a progress bar at 18.75%, updated 10 hours ago, and marked as "draft". There are "Publish" and "Edit" buttons next to the activity row. On the right side of the main content area, there are "DOWNLOAD ALL" and "+ ADD ACTIVITY" buttons.

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



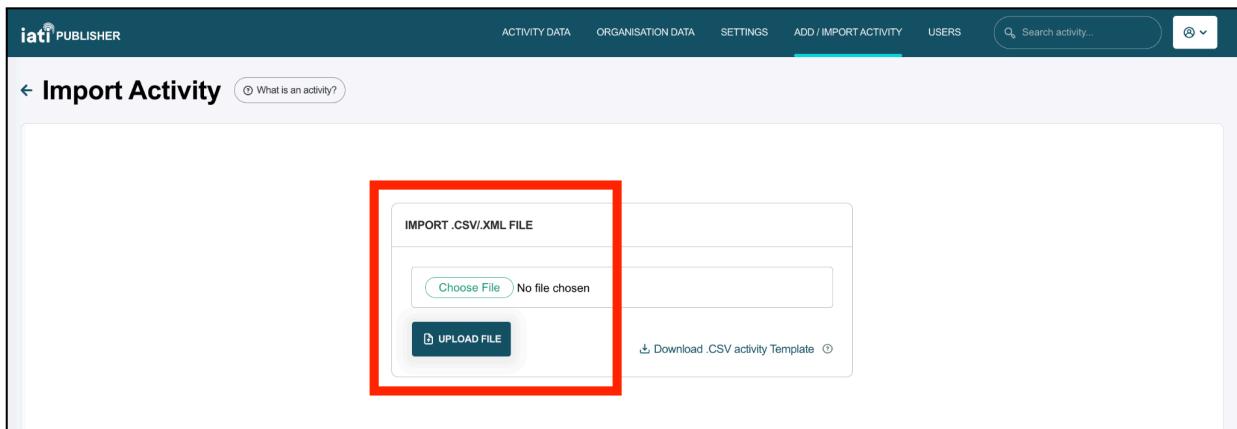
The screenshot shows the "ADD / IMPORT ACTIVITY" page. At the top, there are tabs for "ADD / IMPORT ACTIVITY" (which is active) and "USERS". Below the tabs, there are two main import options: "ADD ACTIVITY MANUALLY" and "IMPORT ACTIVITIES FROM .CSV/.XML" (which is highlighted with a red box). Underneath these, there is another option: "IMPORT ACTIVITIES FROM .XLS". To the right of the import options, there are icons for "ADD ACTIVITY" (a plus sign inside a circle) and "EXPORT ACTIVITY" (a document icon).

### 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.

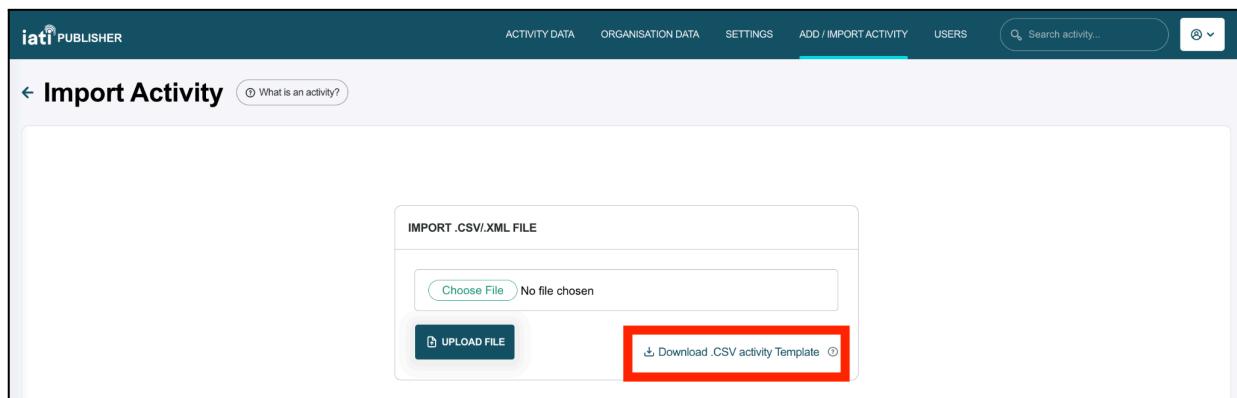
Select and upload your XML file on the CSV/XML import page:



#### 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:

The screenshot shows the 'Import Activities from .XLS' page. At the top, there's a heading 'Please select one to proceed' with four options: 'Basic Activity Elements', 'Result except Indicator and Period', 'Indicators except Period', and 'Period'. Below these are download links for identifier codes. In the center, there's a file upload section with a 'Choose File' button (showing 'No file chosen') and an 'UPLOAD FILE' button. A note says 'Please make sure to read the instructions before beginning this process.' A red arrow points to the 'Read our import manual' button, which is highlighted with a red border. Other buttons include 'Download XLS activity Template' and a 'support' link.

### 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.

The screenshot shows the 'Your Activities' page. It lists two activities: 'test activity' (Status: Existing) and 'new activity' (Status: New). To the right of the list is a vertical column with checkboxes next to each activity name. At the top of this column is a large red-bordered box containing a 'IMPORT (2/2)' button. The entire interface has a clean, modern design with a dark header and light body.

# 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:

The screenshot shows the 'Your Activities' page. At the top, there are filters for 'All (64)', 'Published (11)', 'Ready for republishing (4)', and 'Draft (49)'. Below is a table with columns: S.N., ACTIVITY TITLE, PUBLISHING PROGRESS, and UPDATED ON. The first row shows 'test result data completeness (#1542)' with 43.75% progress, updated 8 hours ago, and published. There is a checkbox next to each row. At the top right, there is a 'DOWNLOAD ALL' button with a dropdown arrow, which is highlighted with a red box. Other buttons include '+ ADD ACTIVITY' and a search bar.

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

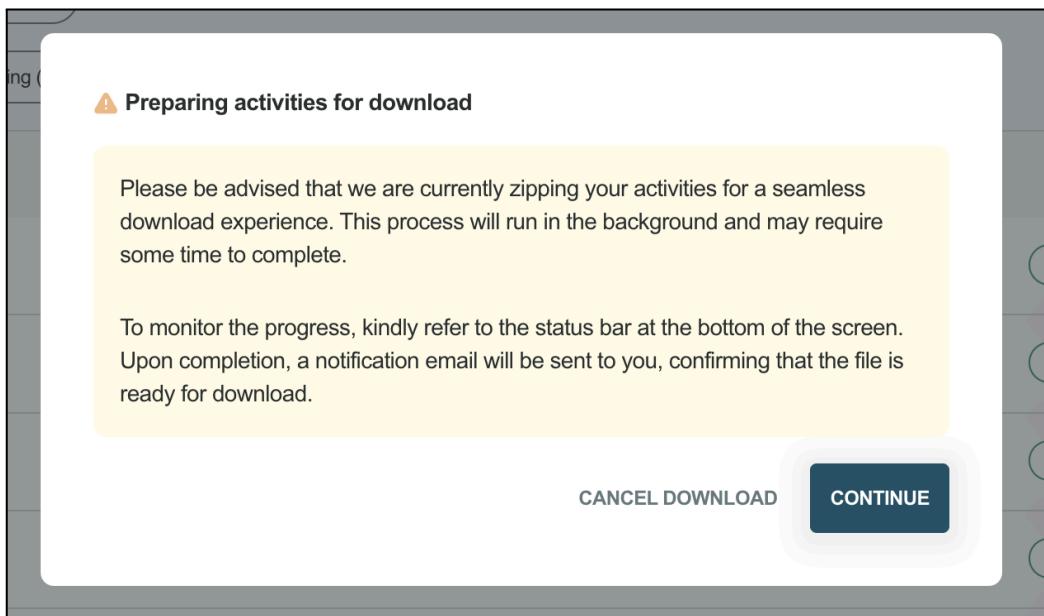
The screenshot shows the 'Your Activities' page with a red arrow pointing to a download icon with a dropdown arrow. A dropdown menu is open, showing options: 'Download CSV', 'Download XML', and 'Download XLS'. To the right of the table, there is a column of checkboxes, with four of them checked and highlighted with a red box. The table rows show various activities with their publishing progress and status.

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

The screenshot shows a dropdown menu with three options: 'Download CSV', 'Download XML', and 'Download XLS'. Below the menu is a green 'Unpublish' button.

### 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](mailto:support@iatistandard.org) or use the Support button within the tool.

The screenshot shows the IATI Publisher interface. At the top, there is a navigation bar with links for ACTIVITY DATA, ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY, and USERS. There is also a search bar and a user profile icon. Below the navigation bar, the page title is "Your Activities". A sub-header "Your Activities" is followed by a question "What is an activity?". On the right side of the header, there are buttons for "DOWNLOAD ALL" and "+ ADD ACTIVITY". In the center, there is a large blue circular icon with a folder symbol. Below the icon, the text "No activity has been added yet." is displayed. At the bottom of the page, there is a small note: "Click on the button below to add a new activity". On the far right, there is a "Support" button with a question mark icon, which is highlighted by a large red arrow pointing towards it.