IATI Setup Guide

April 2020

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Overview

In this setup guide, system administrators and implementing consultants will learn to:

- Enable IATI XML generation in Amp Impact
- Set up the environment for entry of IATI data
- Modify Amp Impact default interfaces to include IATI-specific information

After following this guide, a Salesforce environment will be set up so that it can automatically take its impact and transaction data, entered through Amp Impact, and print out an IATI standard XML file with that data. Clients can take that XML and publish it directly to the IATI registry.

Terminology

IATI: The International Aid Transparency Initiative (IATI) is a global initiative to improve the transparency of development and humanitarian resources and their results to address poverty and crises.

Organization Standard: The IATI organizational standard is used to describe one or more organizations involved in any stage development cooperation (funding, implementing etc.). It is designed to report forward-looking aggregate budget information for the reported organizations, and planned future budgets to recipient institutions or countries.

The IATI organizational standard is also used to report links to relevant public documents. Organizations publish this data in an organization file. It is expected that every organization publishing IATI data should include one organisation file, which is updated at least annually.

Activity Standard: The IATI activity standard is designed for reporting the details of individual development cooperation activities/projects. An activity is defined by the reporting organization. Depending on who is reporting, it might be a large program, a small project, or another logical grouping of work and resources.

The IATI activity standard is the most widely used part of IATI. The activity standard supports around forty different fields, referenced by standard codelists, and designed to capture information about many different kinds of aid activities. Organizations publish this data in an activity file. It is expected that every organization publishing IATI data should include one at least activity file. An activity file can detail one or many activities, and an organization can publish one or many files.

> ⓘ This guide will use the terms for objects and fields in Amp Impact (i.e. API names), which may not always mirror the terminology used in IATI. For a full understanding of how Amp data maps to IATI data, see the IATI-Amp Impact Data Mapping for Implementers Guide (format: Excel).

Provide IATI Users with Field/Object Permissions

For Users to generate their IATI XML file through Amp, they will need additional permissions to ensure they have access to the data relevant to IATI reporting. This access is not provided out-of-the-box for all Amp Users.

Assign IATI Permission Set to IATI Users

After installing Amp Impact and enabling the IATI feature, follow these steps to ensure your IATI Users have access to all IATI objects and fields.

1. Go to the Setup Quick Search box, and enter "Permission Sets".
2. Select the "IATI Full Access" Permission Set.
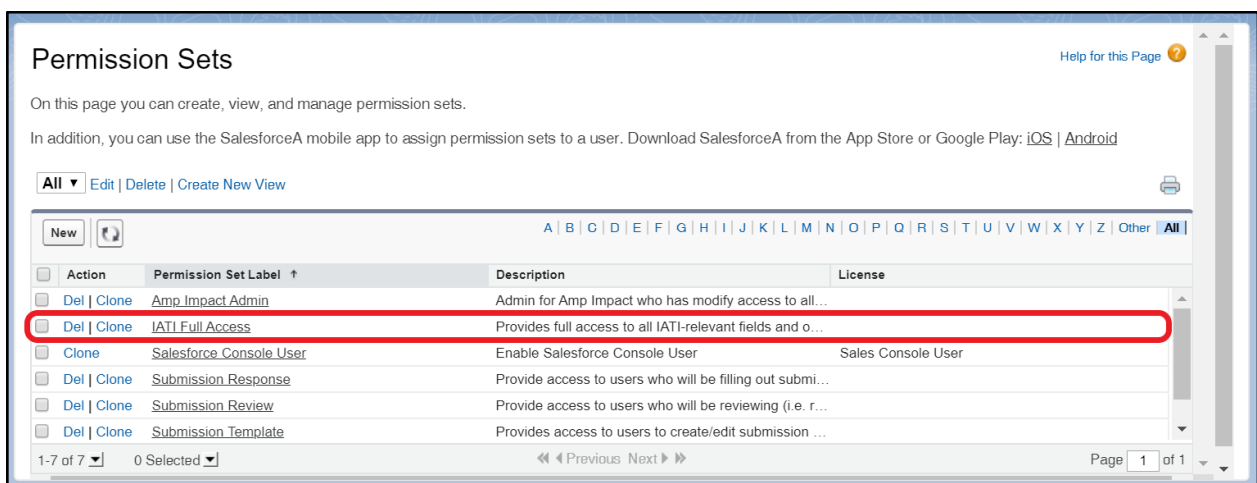
3. Click the Manage Assignments button.
4. Click the Add Assignments button.
5. Select all relevant users that should have access to the IATI Full Access Permission Set and click "Assign".

If an IATI User does not need access to all IATI objects and fields, the IATI_Full_Access permission set can be cloned, and object/field permissions that are not necessary can be removed from the cloned permission set.

Add Permissions for IATI Fields to User Profiles/Custom Permission Sets

Due to a [Salesforce limitation](#) on packaging permissions for objects that are detail in a master-detail relationship to standard Salesforce objects, the permissions for two objects – ampi__Organization_Role__c and ampi__Project_Role__c – and their fields must be added manually to either the user profile or a custom permission set, depending on the environment and use case.

Below is the list of objects/fields for which permissions must be manually set:

Object	Field
ampi__Organization_Role__c	ampi__Organization__c
	ampi__Organization_Activity_Identifier__c
	ampi__Role__c
	ampi__Organization_Role__c
	Name
	ampi__Project__c
	ampi__IATI_Providing_Project__c
	ampi__Exclude_From_IATI__c
	ampi__IATI_Role_Code__c
ampi__Project_Role__c	ampi__Active__c
	ampi__Contact__c
	ampi__Description__c

|	ampi__End_Date__c
	ampi__Project__c
	Name
	ampi__Role__c
	ampi__Start_Date__c
	ampi__Type__c
	ampi__IATI_Contact_Type__c
	ampi__Is_IATI_Reporter__c

ⓘ System Administrator Note: Admins should keep in mind that a flow will not run if it invokes an Apex class that the IATI User doesn't have access to. If admins disable any currently enabled Apex Classes invoked by Flow, they may need to adjust profiles or permission sets for IATI Users who run flows that invoke Apex classes.

Enable Customize Application Permission for Direct Read Access to Custom Metadata Types

The Customize Application Permission is required for direct read access to Custom Metadata Types. This follows Salesforce's rollout of the "secure by default" approach. For more information on its use in Amp Impact, see Set Defaults for IATI XMLs.

To grant a profile or permission set read access to a custom metadata type:
1. Go to the profile or permission set that you want to grant access to.
2. Under Enabled Custom Metadata Type Access, click Edit, as shown in screenshot below.

Amp **Impact**
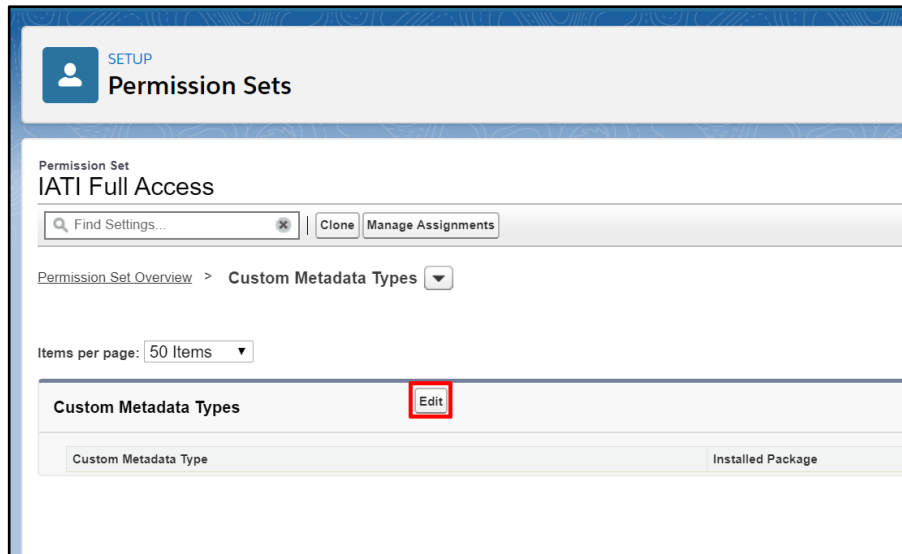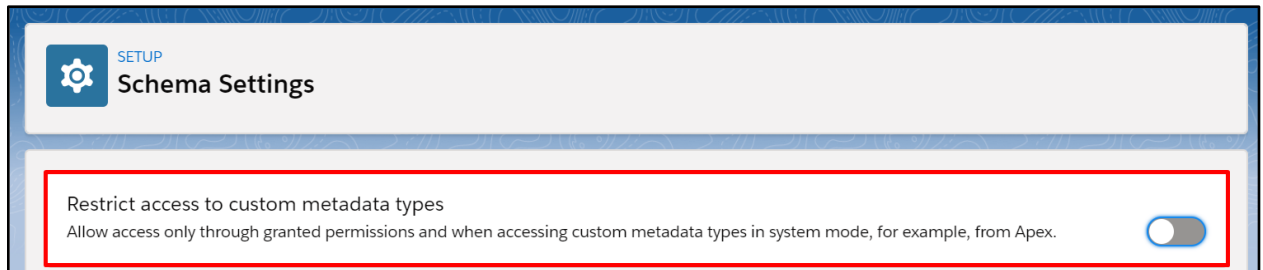

3. Add the custom metadata type, ampi.IATI Default Contact and amp.IATI Default Reporting Org, to the list of Enabled Custom Metadata Types. See screenshot below.
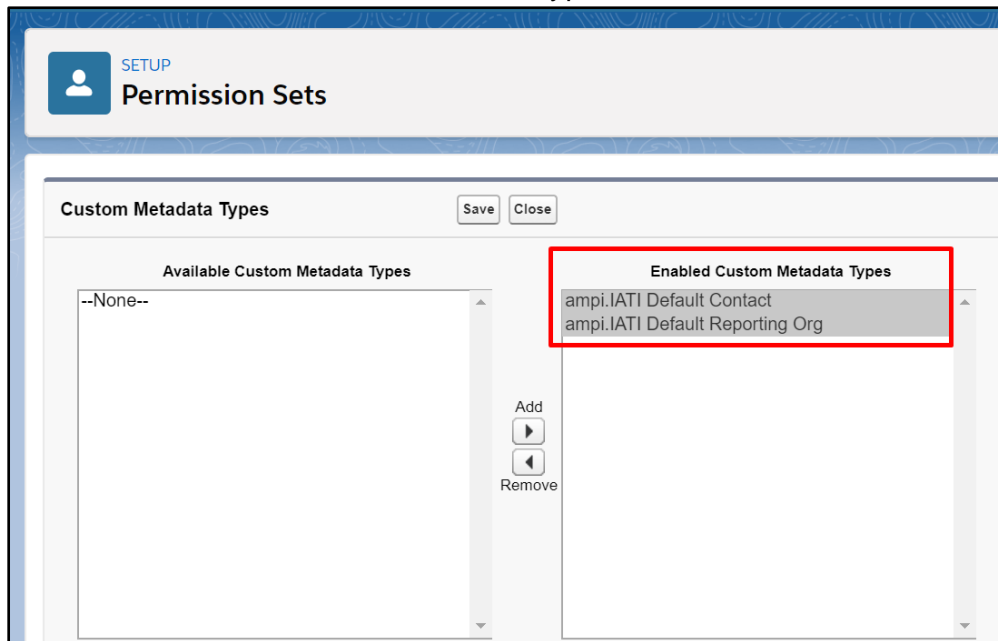
To re-enable read access to custom metadata outside of Apex code or system mode contexts, see the following steps:

1. In Setup, navigate to Schema Settings.
2. Deselect Restrict access to custom metadata.

Enable XML Generation from Accounts

Account is the central object from which both the IATI Organization and IATI Activity XMLs will be generated. In order to generate the XML files, some setup is required on the Account page layout to enable Users to generate their IATI files.

1. Create/Customize Flow from Template

> ⓘ System Administrator Note: This step is optional based on whether additional filter criteria should be available to users when creating their IATI XMLs.

By default, Amp contains a Screen Flow that Users will interact with to:
1. Select whether they are creating the XML file according to the IATI Organization Standard or the IATI Activity Standard,
2. If the XML is being generated according to the IATI Activity Standard, filter the Activities (ampi__Project__c records) that will be printed into the XML.
   a. By default, the only filter that is available for use is to either display all records, or only records where ampi__Ready_For_IATI_Reporting__c = TRUE.

If the Screen Flow must be customized (e.g. text changed, filter options added), then this Flow can be cloned and modified for those customizations.

Customize Flow Filters (Activity Standard only)

This step is only required if the filters for the Activity Standard XML in the Screen Flow need to be customized. In order to customize these filters, follow the steps below:

1. Go to Setup.
2. Type and select "Flows" in the QuickSearch menu.
3. Open the IATI_XML_Generation Flow in Flow Builder.
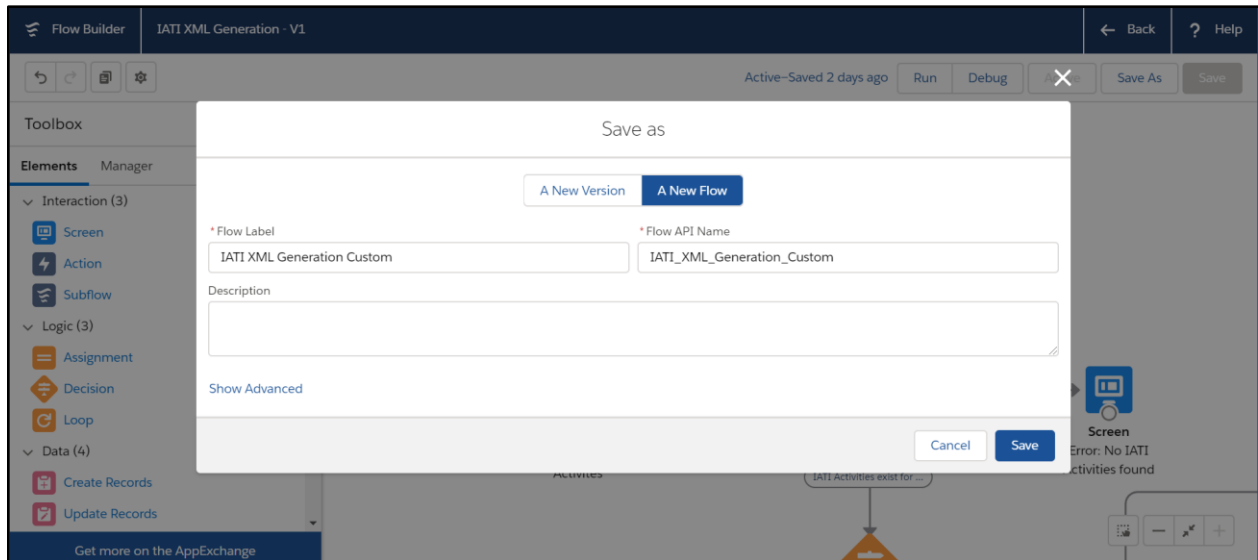4. Modify the available filters in the Filter_IATI_Activities Screen element.
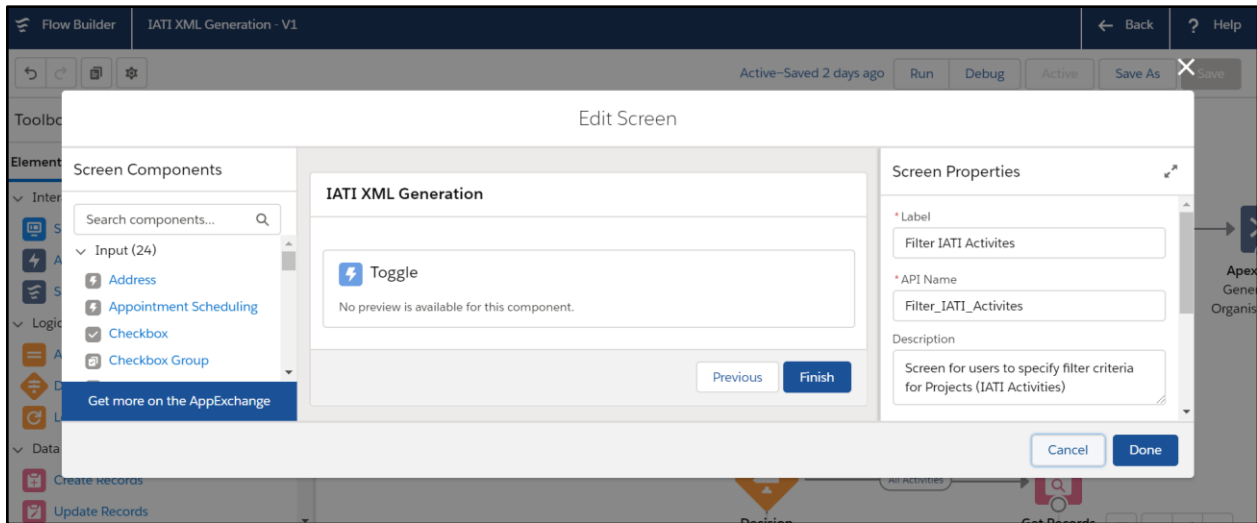
5. Ensure that the filter criteria is reflected in the Filtered_IATI_Activities Get Records element.
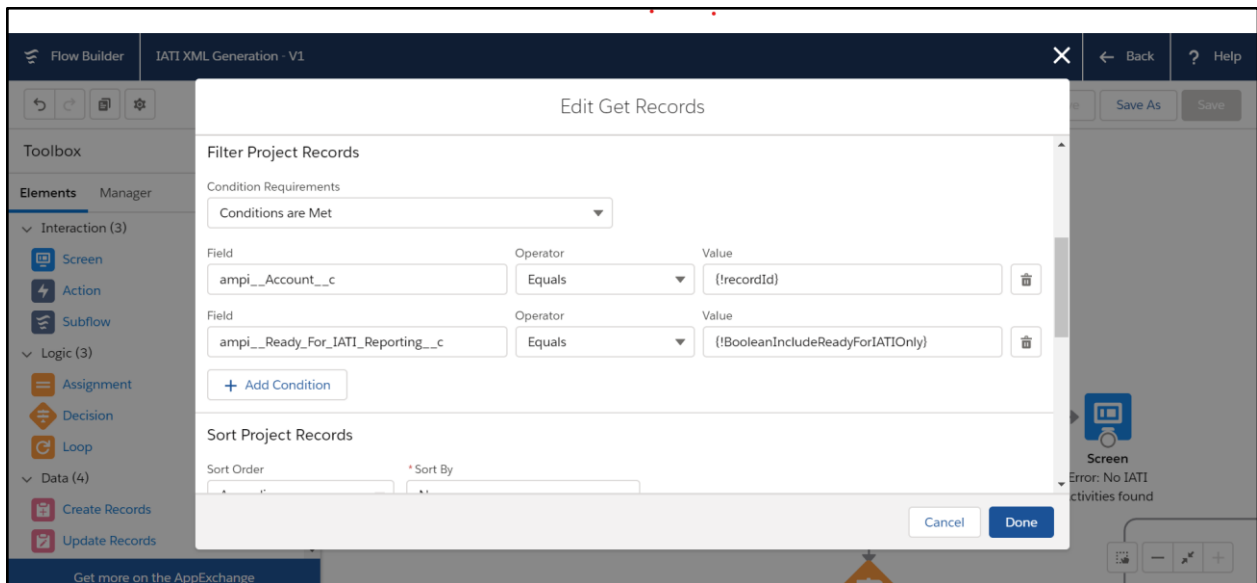
6. Click Save As.
7. In the Save screen, select to save as a New Flow.

Create Lightning Action to Launch Custom Flow

If a custom flow has been created for IATI XML generation, then a new Lightning Action must be created to launch that flow from an Account record.

1. Go to Setup.
2. Go to Object Manager.
3. In Object Manager, select Account.
4. Go to Buttons, Links, and Actions.
5. Click New Action to create a Flow Action, selecting the custom flow created. The Label and Name can be filled out per the use case.
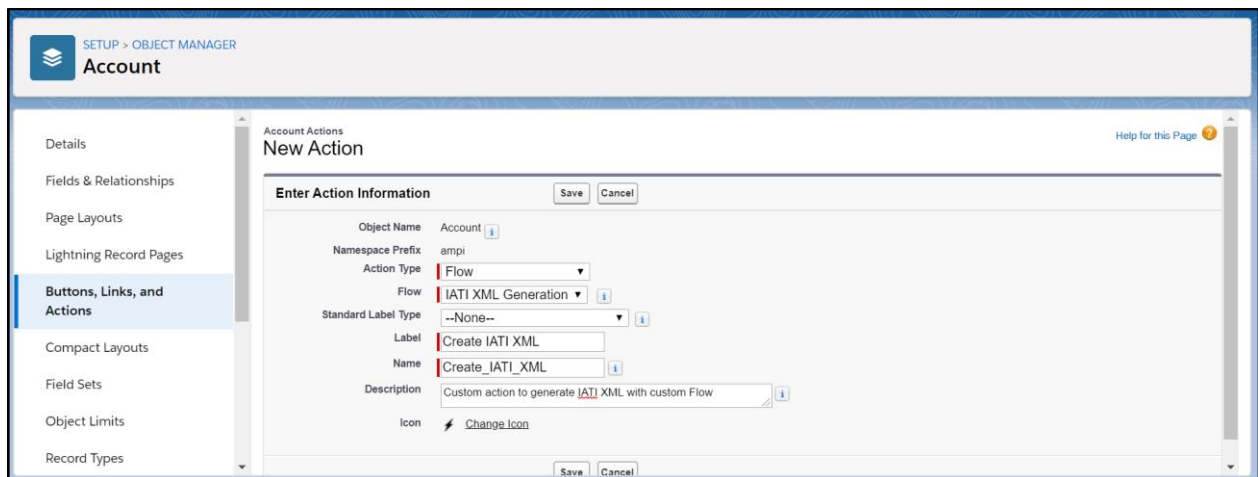
2. (Required) Add Lightning Quick Action to Account Record Page

ⓘ System Administrator Note: These steps detail how to add the Lightning Quick Action for Amp Impact's default Screen Flow IATI_XML_Generation to the Account page layout. If a custom Flow and Lightning Action were created, use that Lightning Action instead.

To ensure that Users can open the Flow that generates the IATI XML files, the Lightning Quick Action that launches the Flow must be added to the Account page layout.

1. Go to Setup.
2. Go to Object Manager.
3. In Object Manager, select Account.
4. Go to Page Layouts.
5. Click into the Page Layout that will be assigned to the Profile(s) of Users who will be generating XML files for IATI reporting.
6. In the top menu, select Mobile & Lightning Actions. From the options that appear, drag and drop Generate IATI XML into the page layout.
7. Click Save.
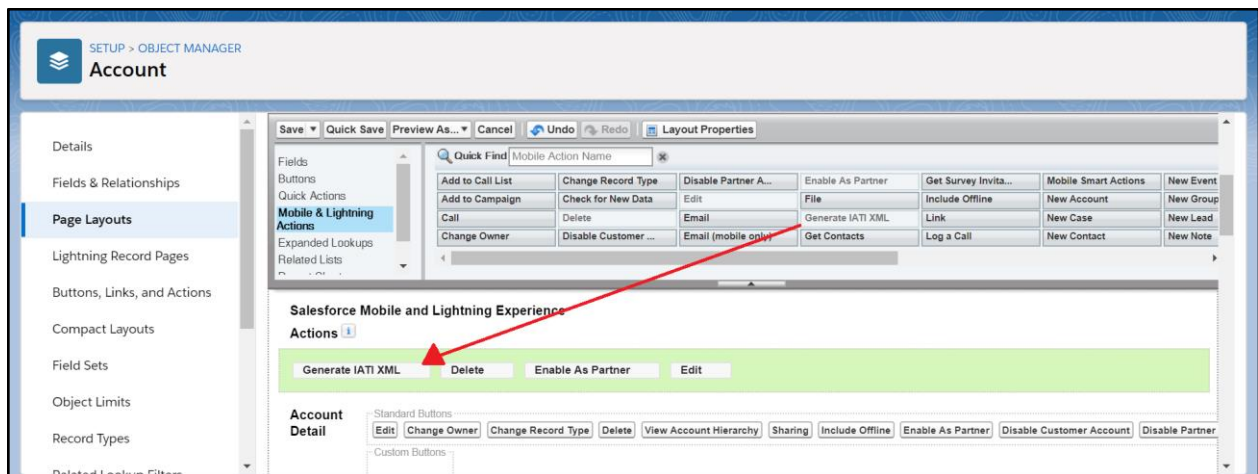
Set Defaults for IATI XMLs

ⓘ System Administrator Note: These steps are optional based on whether the Reporting Organization and/or Contact associated with an IATI XML will be the same across all XMLs generated from the same Salesforce environment.

Create Default Reporting Organization

If only one organization will be the reporting organization for all the IATI XML files generated from a single Salesforce environment, the organization's details can be set as the default for all the IATI files so that the information does not need to be entered for each IATI Activity.

1. Open Setup.
2. Use the Quick Find search to find and open Custom Metadata Types.
3. Click "Manage Records" next to "IATI Default Reporting Org".
4. In the list displayed, click the "New" button to create the IATI Default Reporting Organization.
5. In the edit view:
    a. Set the Label field to the name of the Organization. When clicking out of the input box, this will automatically set the IATI Default Reporting Organization Name.
    b. Enter the IATI Organization Identifier. This must be the unique Id provided by IATI to the reporting organization. For more information on Organization Identifiers, read [here](#).

If no default Reporting Organization is set, then the parent Organization (Account) for an Activity (ampi__Project__c) will be printed as the Reporting Organization for that Activity.

Create Default Contact

If there is only one individual whose contact information will be used for all IATI Activity XML files generated from a single Salesforce environment, that contact information can be set as the default for all the IATI files so that the information does not need to be entered for each IATI Activity file.

1. Open Setup.
2. Use the Quick Find search to find and open Custom Metadata Types.

3. Click "Manage Records" next to "IATI Default Contact".
4. In the list displayed, click the "New" button to create the IATI Default Contact.
5. In the edit view:
   a. Set the Label field to the name of the Contact. When clicking out of the input box, this will automatically set the IATI Default Contact Name.
   b. Enter the IATI Organization. This must be text name of the Organization to contact for more information about an Activity.
   c. Enter the IATI Organization Department.
   d. All other fields are optional.

If no default Contact is set, then the related Contact (ampi__Project_Role__c) marked as the IATI Reporter (ampi__Is_IATI_Reporter__c = TRUE) for an Activity (ampi__Project__c) will be printed as the Contact for that Activity.

Set Up Environment for IATI Data Entry

Depending on the reporting requirements of an organization, the default page layouts and field labels in Amp Impact can be modified to ensure that those requirements are met while creating or updating data.

Update Page Layouts to Include IATI Fields

ⓘ System Administrator Note: This step is optional, depending on the reporting requirements and business processes of an organization. Only fields that are required for IATI reporting should be added to the respective page layouts.

- The objects listed below contain IATI-specific fields that can be printed into the generated XML file.

- These IATI-specific fields need to be added into the respective page layouts so that values can be entered for IATI reporting.

- This list does not contain any IATI-specific objects, as all fields in the page layouts for those objects will be used for IATI reporting. These objects are:
  - IATI_Policy__c
  - IATI_Sector__c
  - Project_IATI_Policy__c
  - Project_IATI_Sector__c
  - Transaction_Project_IATI_Sector__c

- This list also does not contain any fields that are generally used throughout Amp (i.e. outside of IATI reporting).

- Required fields (per IATI reporting) are marked with an asterisk (*) - these should be set as required in the page layout to ensure that the XML file is validated.

Object (API Name)	IATI-Specific Fields (API Name)
Account	- ampi__Exclude_From_IATI__c *ampi__IATI_Organization_Type__c - ampi__IATI_Organization_XML_Link__c - ampi__IATI_Activity_XML_Link__c *ampi__Organization_Identifier__c - ampi__IATI_Secondary_Reporter__c
ampi__Allocation__c	- ampi__IATI_Organization_Role__c - ampi__IATI_Disbursement_Channel__c - ampi__IATI_Humanitarian__c - ampi__IATI_Finance_Type_Category__c - ampi__IATI_Finance_Type__c - ampi__IATI_Flow_Type__c - ampi__IATI_Tied_Status__c - ampi__IATI_Aid_Type__c - ampi__IATI_Aid_Type_Category__c *ampi__IATI_Transaction_Date__c *ampi__IATI_Value_Date__c - ampi__IATI_Description__c
ampi__Budget__c	- ampi__Exclude_From_IATI__c - ampi__IATI_Budget_Status__c *ampi__IATI_Value_Date__c *ampi__IATI_Vocabulary__c

ContentVersion	- ampi__IATI_Publication_Date__c *ampi__IATI_Document_Category__c - ampi__IATI_Document_Level__c - ampi__Publication_Date__c *ampi__IATI_File_Format_Category__c - ampi__Is_Included_In_IATI__c
ampi__Disbursement__c	- ampi__IATI_Organization_Role__c - ampi__IATI_Planned_Disbursement_Type__c - ampi__IATI_Disbursement_Channel__c - ampi__IATI_Humanitarian__c - ampi__IATI_Aid_Type__c - ampi__IATI_Finance_Type__c - ampi__IATI_Flow_Type__c - ampi__IATI_Tied_Status__c *ampi__IATI_Transaction_Date__c - ampi__IATI_Description__c *ampi__IATI_Value_Date__c - ampi__IATI_Finance_Type_Category__c - ampi__IATI_Aid_Type_Category__c - ampi__Exclude_From_IATI__c
ampi__Financial__c	- ampi__Exclude_From_IATI__c - ampi__IATI_Aid_Type__c - ampi__IATI_Aid_Type_Category__c - ampi__IATI_Code__c - ampi__IATI_Finance_Type_Category__c - ampi__IATI_Finance_Type__c - ampi__IATI_Organization_Role__c - ampi__IATI_Disbursement_Channel__c - ampi__IATI_Flow_Type__c - ampi__IATI_Humanitarian__c - ampi__IATI_Percentage__c - ampi__IATI_Transaction_Type_Code__c *ampi__IATI_Transaction_Date__c - ampi__IATI_Transaction_Type__c - ampi__IATI_Tied_Status__c *ampi__IATI_Value_Date__c
ampi__Objective__c	- ampi__Exclude_From_IATI__c - ampi__IATI_Aggregation_Status__c - ampi__IATI_Vocabulary__c - ampi__IATI_Vocabulary_URI__c - ampi__IATI_Code__c
ampi__Organization_Role__c	ampi__IATI_Providing_Project__c

	• ampi__Project__c • ampi__Exclude_From_IATI__c
ampi__Project__c	• *ampi__IATI_Activity_Identifier__c • ampi__IATI_Activity_Scope__c • ampi__IATI_Aid_Type__c • ampi__IATI_Aid_Type_Code__c • ampi__IATI_Aid_Type_Vocabulary__c • ampi__IATI_Capital_Spend__c • ampi__IATI_Collaboration_Type__c • ampi__IATI_Collaboration_Type_Code__c • ampi__IATI_Condition__c • ampi__IATI_Condition_Attached__c • ampi__IATI_Condition_Type__c • ampi__IATI_Condition_Type_Code__c • ampi__IATI_Finance_Type__c • ampi__IATI_Finance_Type_Code__c • ampi__IATI_Flow_Type__c • ampi__IATI_Flow_Type_Code__c • ampi__IATI_Hierarchy__c • ampi__IATI_Humanitarian__c • ampi__IATI_Humanitarian_Scope__c • ampi__IATI_Budget_Not_Provided_Reason__c • ampi__IATI_Humanitarian_Scope_Code__c • ampi__IATI_Humanitarian_Scope_Code2__c • ampi__IATI_Humanitarian_Scope_Vocabulary__c • ampi__IATI_Humanitarian_Scope_Vocabulary_URI__c • ampi__IATI_Humanitarian_Scope_Narrative__c • *ampi__IATI_Project_Status__c • ampi__IATI_Project_Status_Code__c • ampi__IATI_Objectives__c • ampi__IATI_Other__c • ampi__IATI_Target_Groups__c • ampi__IATI_Tied_Status__c • ampi__IATI_Tied_Status_Code__c • ampi__IATI_Linked_Data_URI__c • ampi__Planned_End_Date__c • ampi__Planned_Start_Date__c • ampi__Ready_For_IATI_Reporting__c
ampi__Project_Geographic_Area__c	• ampi__Exclude_From_IATI__c • ampi__IATI_Activity_Description__c • ampi__IATI_Code__c • ampi__IATI_Country_Code__c

	• ampi__IATI_Percentage__c • ampi__IATI_Exactness__c • ampi__IATI_Location_Class__c • ampi__IATI_Location_Reach__c • ampi__IATI_Geographic_Vocabulary__c • ampi__IATI_Feature_Designation_Category__c • ampi__IATI_Feature_Designation__c • ampi__IATI_Percentage__c • ampi__IATI_Region_Vocabulary__c • ampi__IATI_Region__c • ampi__IATI_Region_Code__c • ampi__IATI_Vocabulary_URI__c
ampi__Project_Indicator__c	• ampi__Exclude_From_IATI__c • ampi__IATI_Description__c • ampi__IATI_Vocabulary__c • ampi__IATI_Vocabulary_URI__c
ampi__Project_Role__c	• *ampi__IATI_Contact_Type__c • ampi__Is_IATI_Reporter__c

Translate Amp Terminology to IATI Terminology

ⓘ System Administrator Note: This step is optional, depending on the business processes that are being enforced or facilitated on Amp Impact.

Override Amp Labels with IATI Terms

Amp Impact and IATI use different terminology to describe different artifacts in M&E. The table below provides the default labels of objects and fields in Amp Impact, and their corresponding IATI term. Using Translation Workbench, organizations can override the default Amp labels with IATI terminology.

API Name	Amp Impact Label	Type of Artifact	IATI Term
ampi__Project__c	Project[1]	Object label	Activity

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[1] This does not comprehensively cover all of the points where "Project" will need to be translated into "Activity". For the full list of objects and fields that will need "Project" translated to "Activity", please refer to the field map.

ampi__Catalog_Objective__c	Objective[2]	Object label	Result
ampi__Result__c	Result	Object label	Actual
ampi__Organization_Role__c.ampi__Project__c	Project	Field label	IATI Receiving Activity
ampi__Organization_Role__c.ampi__IATI_Providing_Project__c	IATI Providing Project	Field label	IATI Providing Activity
Account	Account	Object label	Organization
ampi__Indicator__c.ampi__Data_Type__c	Data Type	Field label	Measure
ampi__Project_Indicator__c.ampi__Data_Type__c	Data Type	Field label	Measure
ampi__Disaggregation_Group__c	Disaggregation Group	Object label	Dimension
ampi__Disaggregation_Value__c	Disaggregation Value	Object label	Dimension Value

Add IATI Fields to Field Sets

To facilitate IATI data entry through Amp Impact, certain field sets can be modified to include IATI fields for population. Those field sets are listed below:

Object	Field Set Name	Functionality
ampi__Catalog_Objective__c	ADD_NEW_OBJECTIVE_POPUP	Add New Framework Item popup on ManageLogframes
ampi__Disbursement__c	ADD_EDIT_POPUP	Add New Disbursement and Edit Disbursement popups on ManageDisbursements
	DISBURSEMENT_TABLE	Table columns on ManageDisbursements

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[2] This does not comprehensively cover all of the points where "Objective" will need to be translated into "Result". For the full list of objects and fields that will need "Objective" translated to "Result", please refer to the field map.

ampi__Financial__c	BUDGET_EXCEL_COLUMNS	Columns in Excel spreadsheet downloaded from ampi__Budget__c
	REPORT_EXCEL_COLUMNS	Columns in Excel spreadsheet downloaded from ampi__Reporting_Period__c
ampi__Indicator__c	CATALOG_INDICATORS_TABLE	Columns in Indicator Catalog on ManageIndicators
	INDICATOR_CATALOG_SEARCH_FILTER	Search filters in the Indicator Catalog on ManageIndicators
ampi__Objective__c	EDIT_PROJECT_OBJECTIVE	Edit Framework Item popup on ManageLogframes
	LOG_FRAMES_TABLE	Table columns on ManageLogframes
ampi__Project__c	PROJECT_SUMMARY	Summary header on ManageDisbursements
ampi__Project_Indicator__c	ADD_RESULTS_INFO_POPOVER	Hover popover on AddResults
	AR_SEARCH_FILTERS	Search filters on AddResults
	DEACTIVATED_PROJECT_INDICATORS_TABLE	Columns in Deactivated Project Indicators table on ManageIndicators
	EDIT_PROJECT_INDICATOR_POPUP	Edit Project Indicator popup on ManageIndicators
	PROJECT_INDICATORS_SEARCH_FILTERS	Search filters in Selected Project Indicators and Deactivated Project Indicators tabs on ManageIndicators
	SELECTED_PROJECT_INDICATORS_TABLE	Columns in Selected Project Indicators table on ManageIndicators
	SET_TARGETS_INFO_POP	Hover popover on

	OVER	AddResults
	ST_SEARCH_FILTERS	Search filters on SetTargets

Picklist Limitation for IATI Reporting

Due to the codes generated and printed into the IATI XML files by populating picklist fields, there is a limitation around customizing any of these fields. For any picklist field used for IATI reporting, the picklist values can only be edited in the Label and not in the API Name in order for the corresponding code to print correctly.

ⓘ System Administrator Note: If a picklist value's API Name has been edited from its original value, then the corresponding code will not print into the XML file, which then may cause issues when validating the XML using the IATI public validator.

Find below the list of picklist fields used in IATI reporting with this limitation:

Object	Field
Account	ampi__IATI_Organization_Type__c
ampi__Allocation__c	ampi__IATI_Aid_Type__c
	ampi__IATI_Aid_Type_Vocabulary__c
	ampi__IATI_Disbursement_Channel__c
	ampi__IATI_Finance_Type__c
	ampi__IATI_Flow_Type__c
	ampi__IATI_Tied_Status__c
ampi__Budget__c	ampi__IATI_Budget_Status__c
	ampi__IATI_Vocabulary__c

ampi__Disbursement__c	ampi__IATI_Aid_Type__c
	ampi__IATI_Aid_Type_Vocabulary__c
	ampi__IATI_Disbursement_Channel__c
	ampi__IATI_Finance_Type__c
	ampi__IATI_Flow_Type__c
	ampi__IATI_Tied_Status__c
	ampi__Status__c
ampi__Financial__c	ampi__IATI_Aid_Type__c
	ampi__IATI_Aid_Type_Vocabulary__c
	ampi__IATI_Disbursement_Channel__c
	ampi__IATI_Finance_Type__c
	ampi__IATI_Flow_Type__c
	ampi__IATI_Tied_Status__c
ampi__IATI_Policy__c	ampi__Policy_Marker__c
	ampi__Policy_Significance__c
	ampi__Vocabulary_Code__c
ampi__Indicator__c	ampi__Aim__c
ampi__Objective__c	ampi__IATI_Vocabulary__c
	ampi__Level__c
ampi__Organization_Role__c	ampi__Role__c

ampi__Project__c	ampi__IATI_Activity_Scope__c
	ampi__IATI_Aid_Type__c
	ampi__IATI_Aid_Type_Vocabulary__c
	ampi__IATI_Budget_Not_Provided_Reason__c
	ampi__IATI_Collaboration_Type__c
	ampi__IATI_Condition_Type__c
	ampi__IATI_Finance_Type__c
	ampi__IATI_Flow_Type__c
	ampi__IATI_Humanitarian_Scope__c
	ampi__IATI_Humanitarian_Scope_Vocabulary__c
	ampi__IATI_Project_Status__c
	ampi__IATI_Tied_Status__c
ampi__Project_Geographic_Area__c	ampi__IATI_Exactness__c
	ampi__IATI_Feature_Designation__c
	ampi__IATI_Geographic_Vocabulary__c
	ampi__IATI_Location_Class__c
	ampi__IATI_Location_Reach__c
	ampi__IATI_Region_Vocabulary__c

ampi__Project_Indicator__c	ampi__Calculate_Total__c
	ampi__Data_Type__c
ampi__Project_Role__c	ampi__IATI_Contact_Type__c
ContentVersion	ampi__IATI_Document_Category__c