
IATI Tool: Documentation

IATI Secretariat

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D-PORTAL

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d-portal is a tool which helps users to explore International Aid Transparency Initiative (IATI) data. These data are formatted according to the [IATI Standard](#).

Use d-portal if you want to:

- View individual IATI activities in detail.
- Search IATI activities using keywords and filters.
- Access summaries of IATI data by reporting organisation or recipient country.

Open source

d-portal.org is an open source platform. This means you can use all aspects of the platform to build your own portal using the [free source code](#).

GETTING STARTED

1.1 Searching d-portal

d-portal provides a search function which allows you to explore IATI data. This is made up of filters and a freetext box. As you build your search query, the number of filtered IATI activities will update.

Filters:

The filters are based on elements of the [IATI Standard](#). These include recipient-country, sector, and reporting-org, for example. You can select multiple filters using the dropdown menus. Clicking on “More Filters” displays a wider range of filters. See the [Filter glossary](#) page for more details.

Freetext:

The freetext search box searches against the title and description elements of IATI activities.

Once your search query is ready, you can click “Explore Results” to view the activities.

You can use the settings options at the top right to change the currency, language, and 12-month period your results are displayed in.

1.2 Downloading Results

Your results page will include summary figures and table previews. If you click on any of these you will be presented with a table, with a CSV download button at the top right.

Location data can also be downloaded from heatmaps into a CSV file.

1.3 Example Questions

To practise using d-portal, you can find the answers to these example questions:

- How many projects are taking place in Ghana on water and sanitation (DAC 5 Digit sector group 140)?
- Which organisations are currently working on tackling Ebola in Guinea?
- How much of UNDP funding went to Sierra Leone in 2015 in UK pounds?
- Which government is the original funder of this activity: MW-NBM-R1527-W106?
- Which two countries received the largest amount of aid as a response to Hurricane Matthew?

1.3.1 View your data

Once your organisation’s data is registered with IATI, it can be accessed by anyone through tools such as d-portal. Recent changes can take up to 48 hours to update.

To view your data on d-portal, select your organisation from the drop-down list of Reporting Organisations. Then click “Explore Results” to see the overview page for your organisation, including:

- **Active, ended, and total number of activities**
All your published IATI activities, split by status. Click any of these to see a list of your activities.
- **Funding went to...**
Your organisation’s annual spend and budget for recipient countries. Allocated budget shows activity level budgets for each country. Total budget shows organisation level budgets.
- **Where does the money go?**
Your organisation’s annual spend and budget by sector, using DAC 3 Digit sector codes.
- **Heatmap of all activities**
A heatmap of all your activities using longitude and latitude data.
- **Organisation file**
Information reported in your organisation file, including organisation level documents and budgets.

You can also click the “View this organisation as a Participating Organisation” button. This displays activities which reference your organisation as a funding, accountable, extending, or implementing organisation.

1.3.2 Filter glossary

This page provides more detail on the filters and options available in d-portal’s search function. Definitions of the codes used in each filter dropdown can be found in the [IATI Standard](#).

Settings:

ABC - 123

This button determines the sort order of the dropdown menus; in alphabetical order, or numerical. For example, alphabetically by DAC 3 digit sector codenames, or numerically by sector codes.

Filters:

Activity Status

A code defining the current status of an activity.

Collaboration Type

A code defining the type of collaboration involved in an activity’s disbursements, for example bilateral or multilateral.

Default Aid Type

A code specifying the default type of aid being supplied in an activity, such as project-type intervention or budget support. Individual transactions may have a different code for this element.

Default Finance Type

A code specifying the default type of finance being described in an activity, such as grants or loans. Individual transactions may have a different code for this element.

Default Flow Type

A code defining the default resource flow type for an activity, for example Official Development Assistance (ODA). Individual transactions may have a different code for this element.

Default Tied Status

A code defining the default tied status of an activity; untied, tied, or partially tied. Individual transactions may have a different code for this element.

Document Category

A code defining the category of documents linked to an activity.

Humanitarian Activity

A flag which indicates an activity and/or transaction relates entirely or partially to humanitarian aid.

Humanitarian Scope Vocab

A code for a recognised vocabulary used to classify emergencies, appeals, and other humanitarian events and actions.

Participating Organisation

Organisations involved in an activity. This filter is not extensive, and only includes Reporting Organisations who have registered data on the IATI registry.

Tip

To search for participating organisations not included in the dropdown menu, you can insert their organisation-identifier (org-id) directly into the d-portal url as follows:

```
https://d-portal.iatistandard.org/ctrack.html?&/participating-org@ref=org-id#view=main
```

This allows you to see all activities involving participating organisations which do not report IATI data themselves.

Policy Marker

A combination of **Policy Significance** and **Policy Marker** codes. These define a policy or theme addressed by the activity, and the significance of the policy marker for this activity. For example, the code **0_4** filters for “not targeted, Trade Development”, while **2_4** filters for “principal objective, Trade Development”.

Reporting Organisation

The organisation reporting an activity, taken from the IATI Registry.

Tip

To search for reporting organisations not included in the dropdown menu, you can insert their organisation-identifier (org-id) directly into the d-portal url as follows:

```
https://d-portal.iatistandard.org/ctrack.html?&reporting_ref=org-id#view=main
```

This allows you to access an organisation’s data when they are not using their validated organisation-identifier in their publication.

Recipient Country

A ISO 3166-1 alpha-2 code specifying the recipient country of an activity or transaction.

Related Activity Type

A code defining the relationship between an IATI activity and another, separately reported IATI activity.

Result Type

A code defining the type of result being reported in an activity.

Sector

An OECD DAC 5-digit code classifying the purpose of an activity or transaction.

Sector Group

An OECD DAC 3-digit code classifying the purpose of an activity or transaction.

Tag Vocabulary

A code defining the tag classification vocabulary used in an activity. For example, the UN Sustainable Development Goals codelist.

Total Outgoing Commitment

The sum of all outgoing commitment **type transactions** in an activity. This can be used to filter activities by

minimum and/or maximum total Outgoing Commitment.

Transaction Type

A code defining the type of transactions in an activity, for example disbursements, or incoming commitments.

Year Range

The start and/or end year of an activity, taken from actual and planned [activity dates](#). The filter looks for activities that were active in the period between the minimum and maximum year. So activities that started before the end of the max year and ended after the start of the minimum year will be returned.

DATA SOURCES

Data	Source
IATI Data	IATI Dashboard (direct from reporting organisations)
IATI Standard	IATI Standard
Country Flags	Wikipedia Public Domain only images
Country Names and Codes	ISO3166 Alpha-2
Exchange Rates (1st preference)	International Monetary Fund
Exchange Rates (2nd preference)	Federal Reserve Economic Data
Exchange Rates (3rd preference)	CodeforIATI
Exchange Rates (4th preference)	Organisation for Economic Co-operation and Development
Exchange Rates (5th preference)	Failsafe

GENERAL FAQs

1. *What data is included in d-portal?*
2. *What is IATI?*
3. *Why can't I see my published data on d-portal?*
4. *Why are some data fields missing or out of date?*
5. *How can I preview my data?*
6. *Why are there zeros and dashes in the tables?*
7. *Where can I ask questions about d-portal?*
8. *Where can I access the classic d-portal theme?*

1. What data is included in d-portal?

Data published to the [International Aid Transparency Initiative \(IATI\)](#). These data come from [reporting organisations](#).

2. What is IATI?

The [International Aid Transparency Initiative \(IATI\)](#) is a global effort to make data about development and humanitarian aid more transparent. IATI data helps people make informed decisions that deliver better results.

3. Why can't I see my published data on d-portal?

It is normal for there to be a delay between publishing your activity (e.g. in [IATI Publisher](#)) and seeing it on d-portal. This is because d-portal can take up to 48 hours to update.

If there are critical errors in your data, your files will not be processed and displayed by IATI tooling. You can check for critical errors using the [IATI Validator](#).

Your data needs to be published openly to be accessible to our tools. If you have created and published your own XML files (i.e. not using a tool like [IATI Publisher](#) or [Aidstream](#)), please see the IATI website for more information on [publishing without access restrictions](#).

If your activity data still isn't visible on d-portal after 48 hours, please [contact us](#).

4. Why are some data fields missing or out of date?

Common reasons for “missing” data in d-portal include:

- Reporting organisations can include different levels of detail in their data.
- Reporting organisations may follow different update schedules.
- There may be errors in a reporting organisation’s data. This can be checked using the [IATI Validator](#).

5. How can I preview my data?

[D-preview](#) can be used to preview your IATI activity data. [IATI Switcheroo](#) can be used for organisation files (upload your XML file then download the HTML to view your organisation data).

6. Why are there zeros and dashes in the tables?

Zeroes indicate data quality issues, such as codes which do not follow the IATI Standard. Dashes show that an organisation does not currently report IATI data.

7. Where can I ask questions about d-portal?

By [contacting us](#) or raising an issue on [GitHub](#).

8. Where can I access the classic d-portal theme?

You can access the classic d-portal theme at <https://classic.d-portal.org/>.

TECHNICAL FAQS

1. *Which transaction types are used in summary tables?*
2. *How is the data cleaned?*
3. *How is data assigned to a specific year?*
4. *How are exchange rates calculated?*
5. *Why is my organisation's data missing from a recipient country's chart/table/map?*
6. *Why are graphs missing from my activity?*
7. *Why do graphs start at 1970-01-01 for my activity?*
8. *What is the source of country codes and descriptions?*
9. *Where is the additional data used in d-portal stored?*
10. *Why are sectors aggregated using DAC 3 Digit codes?*
11. *How are results percentages calculated?*

1. Which transaction/transaction-type are used in summary tables?

- Spend data is the sum of expenditure and disbursements. If these are not published, outgoing commitments will be used.
- Total commitment is the sum of outgoing commitments. If these are not published, expenditure and disbursements will be used.
- Budget is the sum of budget/value. If these are not published, planned-disbursement/value will be used.

2. How is the data cleaned?

To be updated following finalisation of new data policy.

3. How is data assigned to a specific year?

- For transactions, using transaction/transaction-date, else transaction/value/@value-date.
- For budgets, using budget/period-end.

4. How are exchange rates calculated?

Exchange rates are taken from the [Freechange](#) application. Freechange uses a number of sources for exchange rates, depending on data availability. These are fully described in the [Freechange Github repository](#).

For USD, GBP, EUR, and CAD, currency conversion is carried out when transactions and budgets are imported into d-portal. The [value-date element](#) is used as the exchange date.

For all other currencies, transactions and budgets are initially converted into USD. They are then converted into the target currency using today's exchange rate. These values are estimates, and will be less accurate for older transactions.

5. Why is my organisation's data missing from a recipient country's chart/table/map?

- Charts need a transaction with a transaction/transaction-date in the relevant year, with a valid recipient-country/@code or sector/@code.
- Tables need a transaction with a transaction/transaction-date in the relevant year, with a valid recipient-country/@code or sector/@code.
- Maps need transactions with a valid location/point/pos and recipient-country/@code.

6. Why are graphs missing from my activity?

Graphs are only shown for an activity if all transactions are in the same currency.

7. Why do graphs start at 1970-01-01 for my activity?

D-portal does not adjust the x-axis when there is only one transaction of a given type, or if all transactions are on the same date. The axis will be adjusted when more transactions are added.

8. What is the source of country codes and descriptions?

The [ISO 3166-2 Wikipedia page](#).

9. Where is the additional data used in d-portal stored?

In [github](#). This includes:

- List of Reporting Organisation IDs
- Currencies
- Exchange rates
- Sector codes

10. Why are sector/@code aggregated using DAC 3 Digit codes?

Some organisations only publish data with DAC 3 Digit codes. DAC 5 Digit codes are converted to 3 digits for d-portal visualisations.

11. How are results percentages calculated?

The results percentage is the result/indicator/period/actual/@value, expressed as a percentage from the result/indicator/baseline/@value to the result/indicator/period/target.

It is clamped from 0 to 100. If the target or actual value is less than the baseline value, the percentage will be 0%.

For example, a result could have baseline of 10, a target of 100, and an actual value of 50.

- The baseline to target value change is: $100 - 10 = 90$
- The baseline to actual value change is: $50 - 10 = 40$
- The results percentage is therefore: $40/90 \times 100 = 44\%$

PREVIEW YOUR DATA

[d-preview](#) is a tool which generates a private preview of an IATI XML file. Using the same interface as d-portal, d-preview allows users to “proof-read” their IATI XML before publication.

Users can upload IATI XML from their computer, or use a link to a file to generate a preview. The link to this preview can also be shared with colleagues and stakeholders.

All previews are automatically deleted after ten days.

QUERY D-PORTAL

[Dquery](#) provides a read only SQL interface to the d-portal database. This includes non-standard attributes and extensions to the IATI Standard which are not displayed by the d-portal site. Data can be downloaded from Dquery in XML, JSON, HTML, and CSV formats.

Dquery includes example queries, and the option to view the results of queries on the d-portal site.

In depth documentation for Dquery is available on [Github](#).

WIDGET GENERATOR

The [d-portal Generator](#) is a tool to help users to reproduce IATI data in their own webpages or blogs. It generates HTML code which you can copy into your webpage to create an IATI widget.

These widgets can show IATI data in table, graph, map, or list formats:

- Published by specific reporting-org
- Describing funds a specific recipient-country.

The resulting widget will update automatically overnight, in line with d-portal.

Both secured and non-secured HTTP access is supported by d-portal. This means users on secured domains should also be able to use d-portal Generator content.

DATA VALIDITY AND LOGS

D-portal includes tools which can be used to investigate missing data and errors.

Dash

Dash provides an overview of the data populating d-portal from individual reporting organisations. This includes summary statistics, and reports on errors such as an invalid recipient-country. By showing where invalid data is reported, Dash can help to explain gaps in the data.

d-portal Logs

The d-portal logs site hosts two tools; Database Logs and Xpath Stats.

Database Logs provides a snapshot of all data found in the live d-portal database. This updates nightly, and can be viewed as a table or historical charts.

Xpath Stats show how much each element of the IATI Standard is used in activity or organisation data. This can be viewed as a percentage or as a historical timeline of use. Individual reporting organisations use of the IATI Standard elements can also be explored.

Cleanerr

Cleanerr reports issues with individual datasets. These include:

- Duplicate organisation identifiers
- Duplicate activity identifiers
- Download and import errors