
IATI Tool: Documentation

IATI Secretariat

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IATI Publisher is an online tool for organisations that want to publish data according to the IATI Standard. It is free and managed by the IATI Secretariat.

It is designed for:

- small to medium-sized organisations that have a limited amount of IATI data to publish (typically, this means less than 100 IATI activities)
- entering data directly in the web interface via data entry forms

 **Attention**

While IATI Publisher has some bulk import functionality, it is not recommended for organisations that need to manage their data in external workbooks or other tools. Large organisations, such as donor governments or UN agencies, are advised not to use IATI Publisher for this reason.

STEPS TO PUBLISHING

To use IATI Publisher, first register via IATI Account. You can then sign in to prepare and publish your data using IATI Publisher.

IATI Publisher uses the [IATI Validator](#) to check your data before you publish, providing feedback on validation errors against the IATI schema.

 **Tip**

For more information on data publishing, see [How to publish data](#).

HELP & SUPPORT

Get in touch if you have any questions relating to publishing, using or improving IATI data.

TOOL DEVELOPMENT

IATI Publisher was first launched in December 2022. It is managed by the IATI Secretariat and has been developed by YoungInnovations.

3.1 Signing in

Attention

IATI Publisher switched to use IATI single sign-on in December 2025. You will need an [IATI Account](#) to use IATI Publisher. All IATI Publisher user accounts that existed prior to this were automatically migrated.

Sign in to IATI Publisher with your [IATI Account](#) email address and password. You can reset your password if needed.

3.1.1 Getting Started

When you first sign in, you will see 'Get Started' guidance on screen, which will walk you through the setup steps (Figure 1).

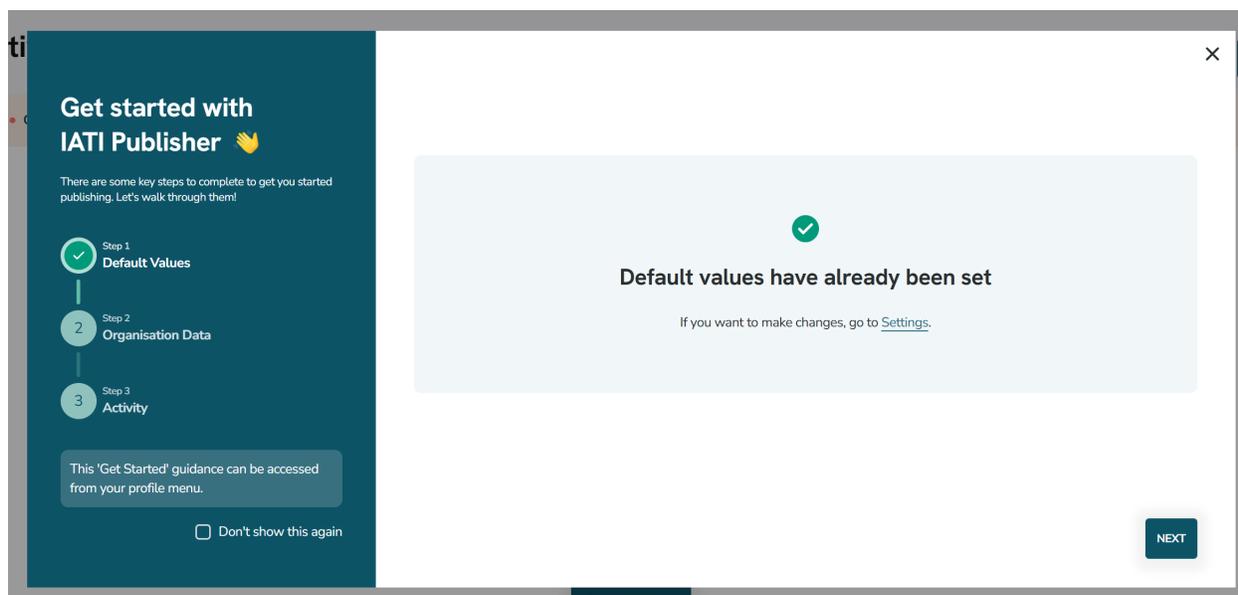


Fig. 1: Figure 1: 'Get Started' onboarding guidance to help your organisation get set up.

Select ‘Don’t show me this again’ in the bottom-left corner of the guidance box to stop it appearing when you sign in. You can re-access it from your profile menu if needed.

3.1.2 Adding other people from your organisation to IATI Publisher

All new users should create an account via [IATI Account](#). If their organisation is already registered with IATI, they will be able to search for it and request to be added to it.

Once their request is approved, the new user will be able to sign in to IATI Publisher and see their organisation’s data.

Getting help

If you are unable to sign in, or need help getting access to your organisation’s account, please [contact us](#).

3.2 Default values

Default values are fields such as language and currency, which occur often in the IATI Standard. It is easiest to populate these once so that IATI Publisher can automatically apply them to any new data you enter in the tool.

You will be prompted to complete default values in Step 2 of the ‘Get Started’ onboarding guidance, which appears after you first sign in.

3.2.1 Which defaults should I populate?

We strongly recommend that you populate your default language and currency. There are other recommended default values that are often required by [donor governments’ IATI requirements](#), depending on who your funder is.

Click the question mark icon next to each default value’s data entry box in IATI Publisher to view more information on what it is.

Recommended defaults for activity data - these are commonly required by funders, who may provide specific advice on how to complete them.

Optional defaults for activity data - these are not required by the IATI Standard or most funders. You can populate them if relevant to your organisation’s activities.

3.2.2 Changing your default values

You can view or edit your default values in IATI Publisher’s [Settings](#) at any time. IATI Publisher will apply the updated values to any new activities that you create in the interface.

You can change default values for an individual activity by clicking ‘Override this activity’s default values’ in the top right of the screen when editing the activity. This will apply the new values to the specific activity, but not affect the defaults stored in Settings.

3.3 Users

Attention

IATI Publisher’s “Users” page was removed in December 2025 as part of the switch to IATI single sign-on. To view or edit the users associated with your organisation’s account, visit [IATI Account](#).

IATI Account’s Users page lists all individuals in your organisation that have an account. Anyone with admin level permissions can add, edit or remove users.

3.3.1 User permissions

There are three permission levels in IATI Account - “Admins”, “Editors” and “Contributors”. [Read more about these different levels.](#)

“Contributors” cannot edit their organisation name or type in IATI Publisher. There are no restrictions on what “Admins” or “Editors” can do in IATI Publisher.

3.4 Managing your profile

⚠ Attention

Any changes to your user information need to be made in IATI Account. User information can no longer be edited via IATI Publisher.

While signed in to IATI Publisher, you can view your profile information via the user icon in the top-right corner of the screen. Click this, then select ‘Your Profile’ from the drop-down menu.

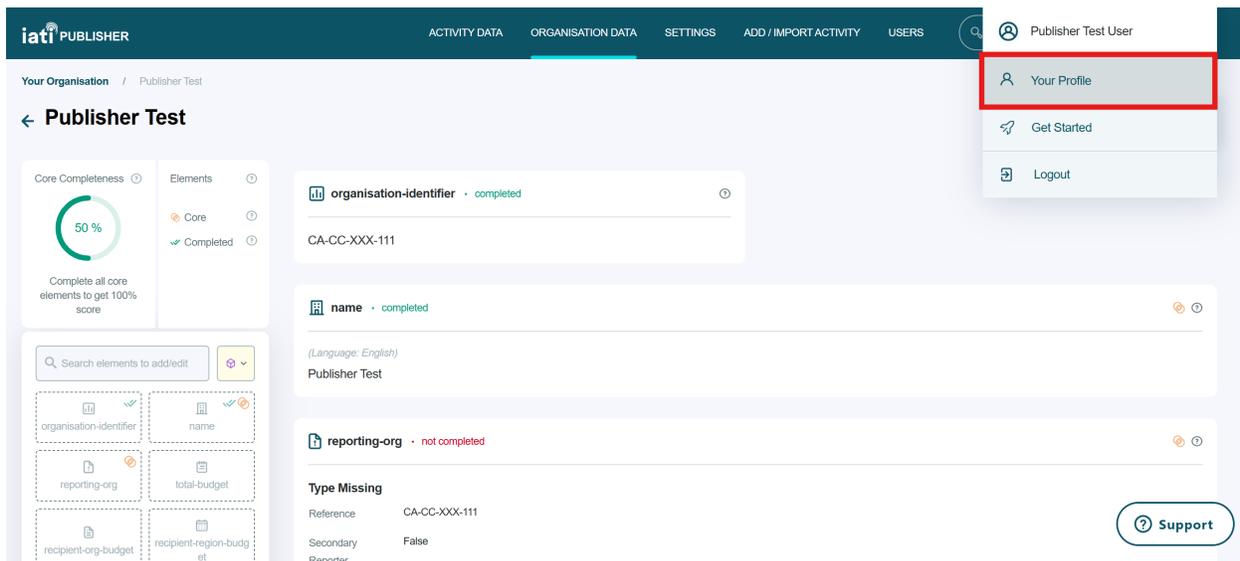


Fig. 2: Figure 1: Accessing ‘Your Profile’ from IATI Publisher’s top-right dropdown menu.

3.5 Organisation data

The IATI data standard includes two types of data file - organisation and activity. The organisation data file 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.

3.5.1 Editing organisation data

You can view or edit your organisation data from IATI Publisher's Organisation Data page.

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

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

3.5.2 Publishing organisation data

1. Ensure that core elements have been completed on the Organisation Data page
2. Click "Publish" in the top right of the screen
3. Click "Continue" after core element completeness has been checked
4. Publication of your organisation data will be confirmed

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

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.

3.6 Creating an activity

The IATI data standard includes two types of data file - organisation and activity. The activity file 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.

Most users will create activities manually in the interface, by entering information about the activity in IATI Publisher's data entry forms. If you want to add multiple activities at once, see the section on [bulk importing](#).

3.6.1 Core elements

The IATI data elements that you can complete for an activity are listed on the left hand side of the activity page (Figure 1). Some are labelled "core" and have a yellow ring symbol.

It is recommended that you complete all "core" elements. They are either mandatory according to the IATI Standard or required by most [donor governments' publishing requirements](#).

The list of core elements for an activity is:

- title
- reporting-org
- iati-identifier
- description
- activity-status
- activity-date
- recipient-country and/or recipient-region
- sector
- participating-org
- budget

- transactions

The following default values are also labelled as core, as most donor governments include them in their IATI publishing requirements:

- default-aid-type
- default-flow-type
- default-tied-status
- default-finance-type

Other elements are optional. You are still encouraged to populate as many optional fields as you can, however, as this makes your data more useful to IATI's data users.

Fig. 3: Figure 1: The IATI data elements that can be populated for an activity.

3.6.2 Adding or editing activity information

Click on each data element in the left hand menu of the activity page to add your data.

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.

3.7 Publishing an activity

Activities can be published from the listing page, or from an individual activity's detail page.

Publishing multiple activities from the activity listing page:

Publishing a single activity from the activity detail page:

If the activity has been edited since it was first published, you will see the option to 'Republish'. Republishing is necessary to update your public data.

The screenshot shows a data entry form with several sections. The top section, titled 'Title', contains a 'narrative' text input field and a 'language' dropdown menu set to 'en - English'. Below this is a '+ ADD ADDITIONAL TITLE' button. The second section, titled 'Category', contains a 'code' dropdown menu set to 'Select code' and a '+ ADD ADDITIONAL CATEGORY' button. Below these are three optional sections: 'Description', 'Language', and 'Document Date', each with a dropdown arrow. At the bottom left is a '+ ADD ADDITIONAL DOCUMENT LINK' button. At the bottom right are 'CANCEL' and 'SAVE AND EXIT' buttons. A red rectangular box highlights the 'Title' and 'Category' sections.

Fig. 4: Figure 2: An example data entry form with mandatory fields highlighted at the top.

The screenshot shows the IATI Publisher interface. At the top is a navigation bar with 'iati PUBLISHER' and menu items: 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS', 'ADD / IMPORT ACTIVITY', and 'USERS'. There is a search bar and a user profile icon. Below the navigation bar is the 'Your Activities' section with a 'What is an activity?' link. There are filters for 'All (64)', 'Published (8)', 'Ready for republishing (5)', and 'Draft (51)'. A 'PUBLISH SELECTED (4)' button with a red arrow pointing to it and a '+ ADD ACTIVITY' button are visible. Below is a table of activities with columns for S.N, ACTIVITY TITLE, PUBLISHING PROGRESS, UPDATED ON, and draft/publish status. The rightmost column contains checkboxes, with the first four checked and circled in red.

S.N	ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON	STATUS	ACTIONS	SELECT
1	Activity 7	100%	an hour ago	draft	Unpublish, Republish	<input checked="" type="checkbox"/>
2	Activity 10	62.5%	3 days ago	draft	Publish	<input checked="" type="checkbox"/>
3	Activity 2	62.5%	3 days ago	published	Unpublish	<input checked="" type="checkbox"/>
4	test result data completeness (#1542)	43.75%	a month ago	draft	Publish	<input checked="" type="checkbox"/>
5	Activity 4	68.75%	a month ago	published	Unpublish	<input type="checkbox"/>
6	test publishing progress box (#1566)	43.75%	a month ago	draft	Publish	<input type="checkbox"/>
7	test location sub-elements (#1565)	43.75%	a month ago	draft	Publish	<input type="checkbox"/>

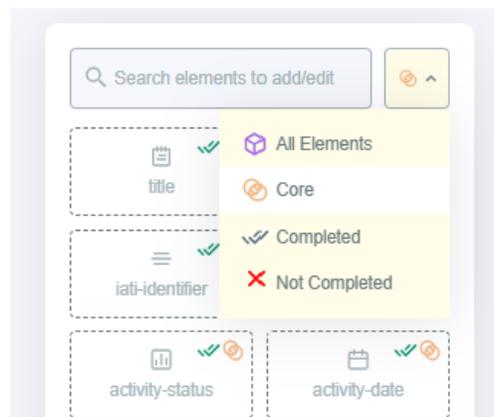
The screenshot shows the IATI Publisher interface for 'Activity 10'. At the top, there's a navigation bar with 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS', 'ADD / IMPORT ACTIVITY', and 'USERS'. A search bar and a user profile icon are on the right. Below the navigation, the page title is 'Activity 10'. On the left, there's a 'Publishing Progress' section showing a 62.5% completion rate and a 'Elements' list with 'Core' and 'Completed' categories. A 'Publish' button is highlighted with a red arrow. The main content area shows 'IDENTIFICATION' details for 'lati-identifier' and 'reporting-org'.

3.7.1 Publishing workflow

Checking core elements

After clicking to publish an activity, IATI Publisher will check first for ‘core element’ completeness. It is recommended that you populate core elements based on IATI Standard rules and most donor governments’ publishing requirements.

Core elements are labelled with yellow rings in the IATI Publisher interface:



You will see a warning message if any of the activities you are trying to publish are missing core elements:

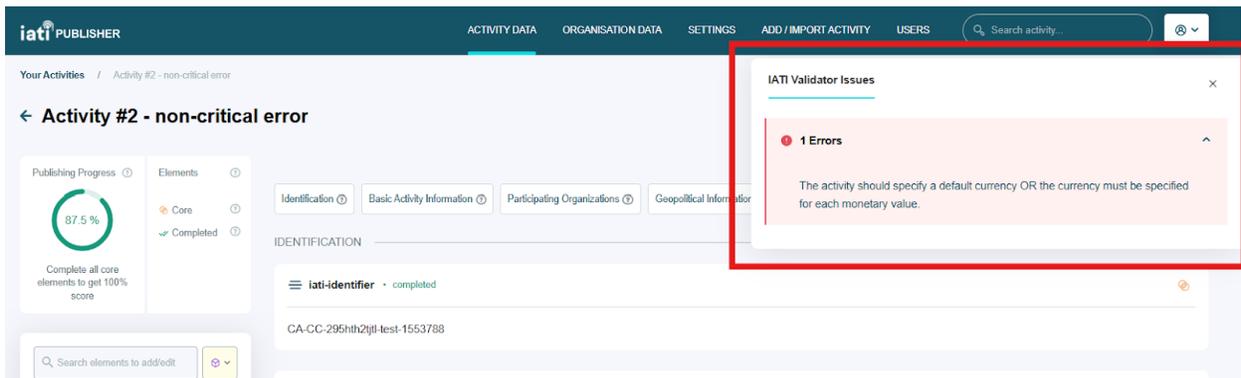
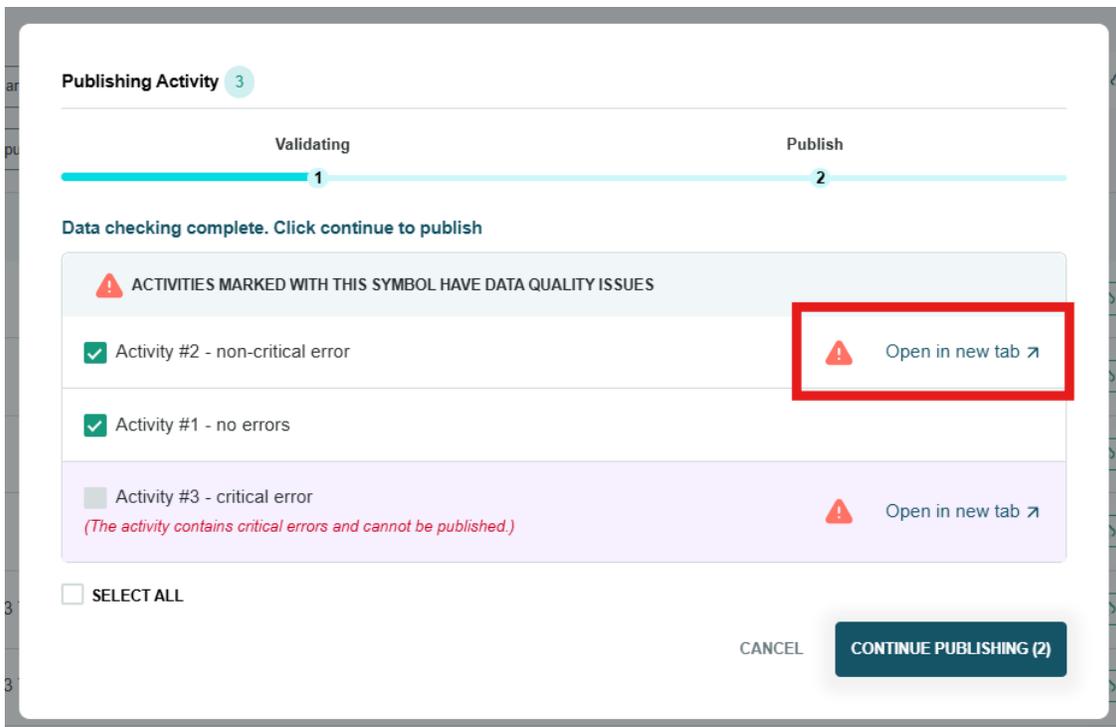
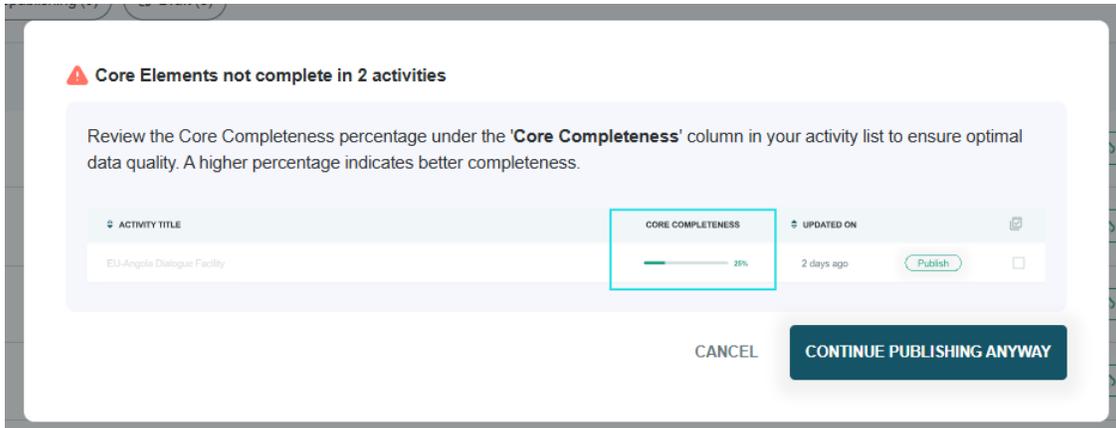
You can cancel publishing at this point to go back and review your activities. Ensuring core elements are complete will help avoid errors at the next validation step.

Data validation

If you continue to publish, your activity data is checked next using the IATI Validator. This assesses data based on the rules and guidance of the IATI Standard, to make sure it is accessible and useful to data users.

Activities with validation issues are labelled in a list:

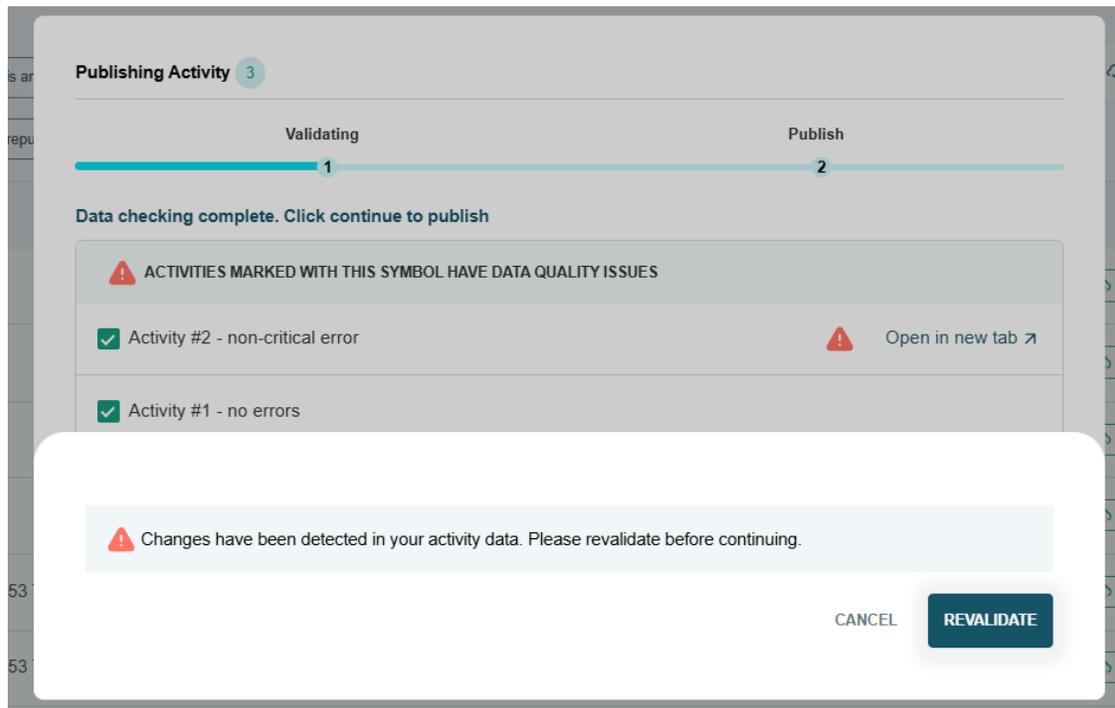
Click on ‘Open in new tab’ to view your activity. On the activity detail page, expanding the text box in the top right will display information on the validation errors:



You can often click on each error to be taken to the relevant data entry form in IATI Publisher where a correction is needed.

There are different levels of severity for validation errors. Importantly, you will not be able to publish any activity that has critical errors. Critical errors usually prevent your activity from being publicly visible in IATI's tools, so it is important to correct these before publication.

If you return to the publication process after having made changes to one of your activities, you will be prompted to revalidate (i.e. recheck) your data before continuing:



Data publication

If no errors are found during the validation step, IATI Publisher will continue to publish your activities.

You'll see a confirmation screen once publication has completed:

3.7.2 Unpublishing activity data

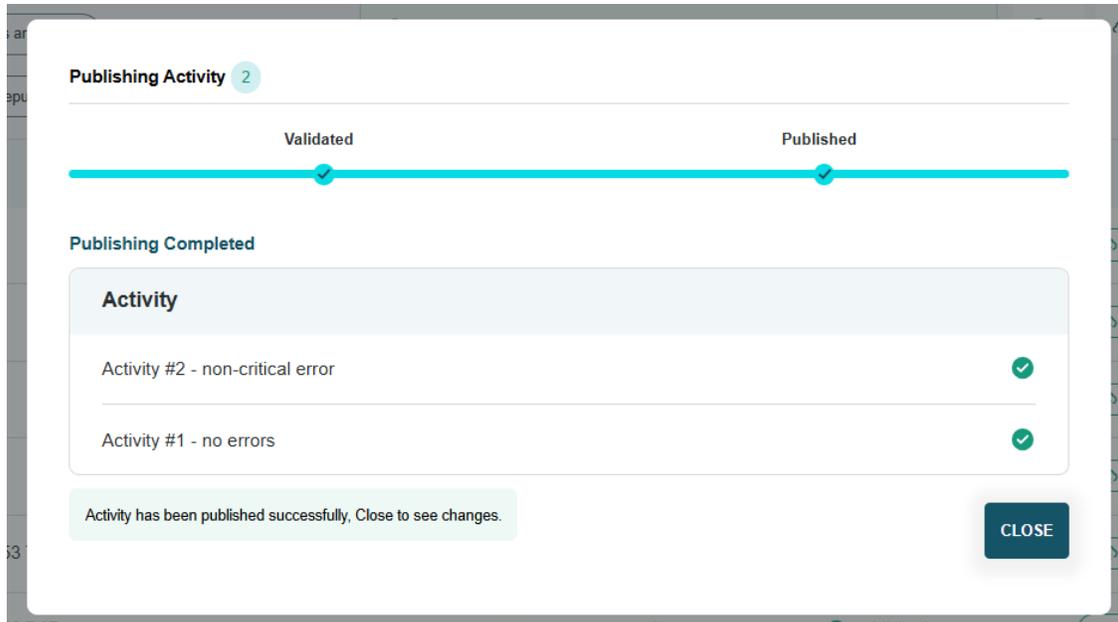
Once published, IATI activities should remain public even after they have finished. You can update and republish your activity data as often as needed, for example to update budgets or end dates.

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

To delete an activity from the IATI Publisher interface, select its checkbox in the activity list then click on the trash can icon next to 'Add Activity'. Deleting permanently removes the activity from IATI Publisher. You will be asked to unpublish the activity first, if applicable.

3.8 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.

Tip

Add budgets or transactions individually in IATI Publisher’s data entry forms, or in bulk via the **bulk import functionality**.

3.8.1 Adding budgets

Locate “budget” in the left hand menu of elements for your activity, then click ‘Edit’ to open the data entry form (Figure 1).

You can add as many budgets as you need, noting that each budget period should be no longer than one year.



Fig. 5: Figure 1: Viewing and editing budget information from the activity detail page.

3.8.2 Adding transactions

Locate “transaction” in the activity element menu, then select a transaction to edit or click ‘Add Transaction’ to create a new one (Figure 2).

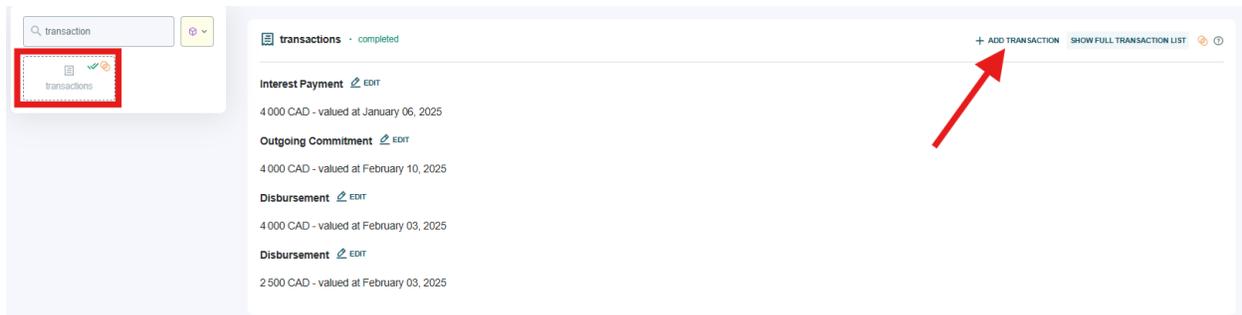


Fig. 6: Figure 2: Viewing and editing transaction information from the activity detail page.

Information such as sector, recipient country and recipient region can be provided at either activity or transaction level, but not at both. If you have already populated this information at activity level, you won't be able to edit it in the transaction data entry form.

The Transaction List is another way to view your activity transactions (Figure 3). The table can be filtered or sorted to help you manage a large number of transactions in the interface.

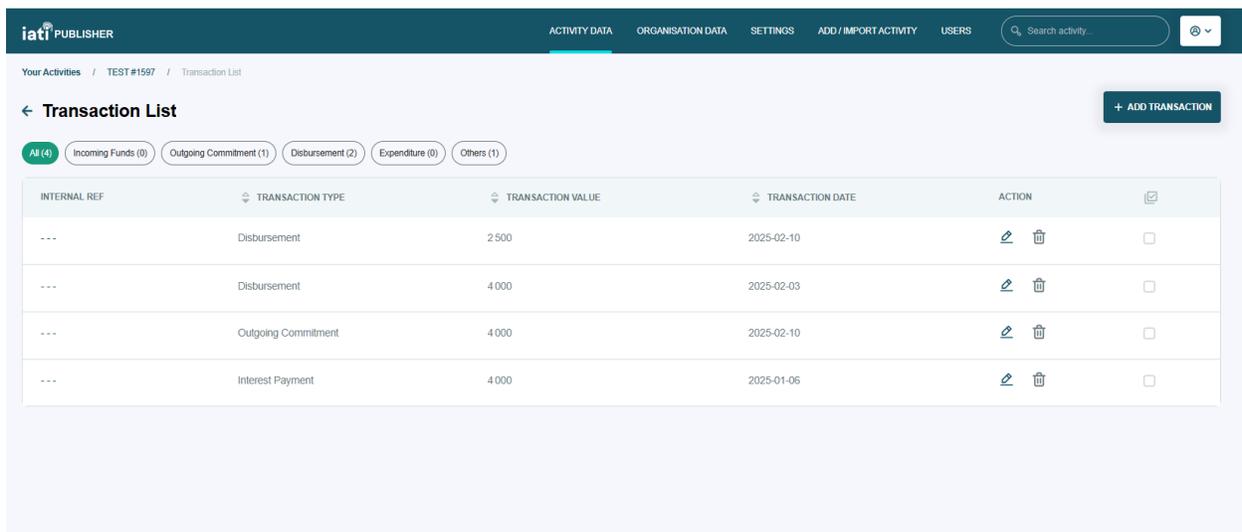


Fig. 7: Figure 3: Viewing the Transaction List for an activity.

3.9 Results

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.

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 indicators and periods from the activity detail page (Figure 1), or from the individual result page.

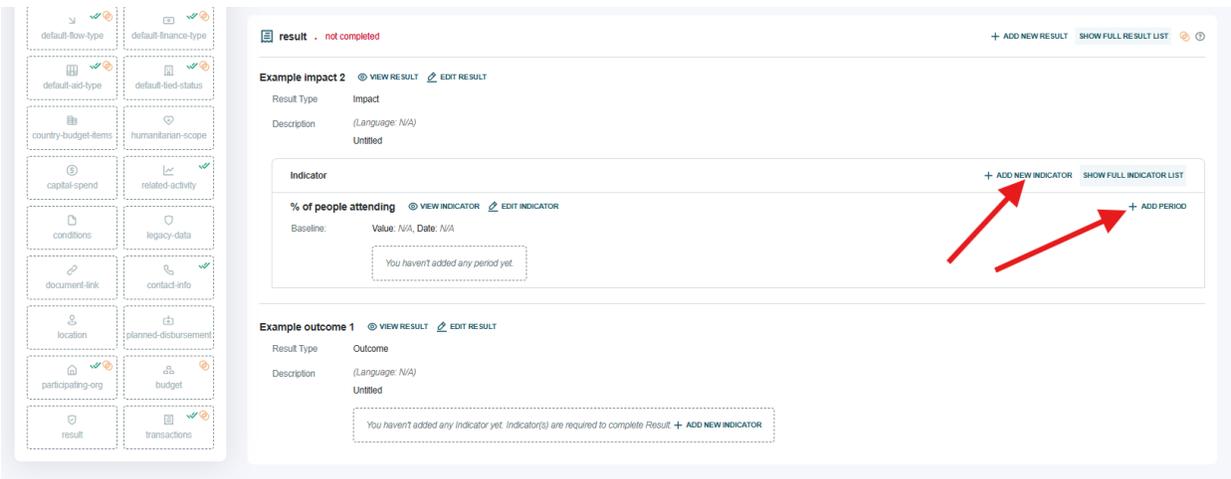


Fig. 8: Figure 1: How to add a new indicator or period from the activity detail page.

3.9.1 Deleting results, indicators or periods

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

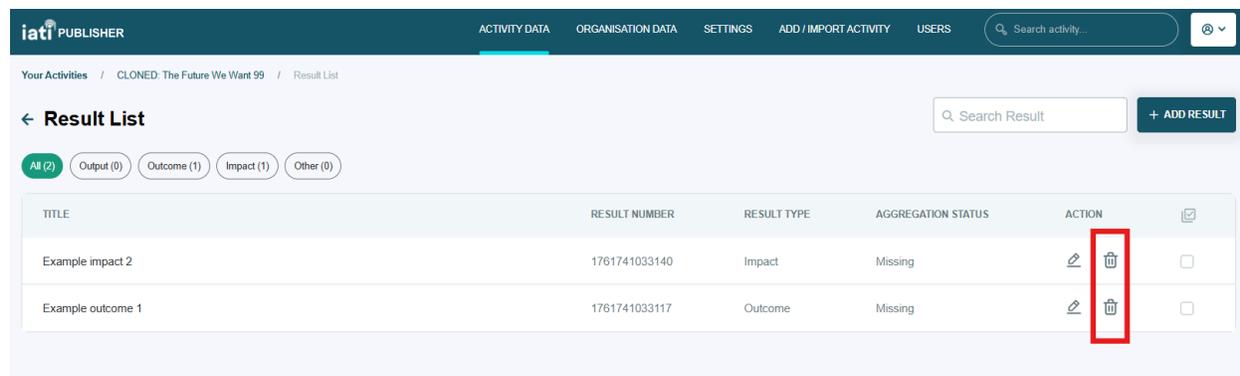


Fig. 9: Figure 2: How to delete results from the Results List.

To delete an indicator or period, click on ‘Show full indicator list’ or ‘Show full period list’ from the activity detail page, then locate the trash can icon next to the entry you want to delete.

3.10 Bulk data import

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

All three file formats require complete activities to be uploaded (i.e. activities that include all mandatory elements according to the IATI Standard). New activities will be added to your list of activities in IATI Publisher. Existing activities (based on the activity identifier) will be overwritten.

While it is possible to add new activities by bulk import, we normally recommend that activities are created manually in the IATI Publisher interface, with basic information entered first. The interface makes it clear which data elements are recommended vs. optional for a new activity.

Example: How do I import transactions in bulk?

Caution

IATI Publisher will overwrite your data in the interface if you upload data for an existing activity. Activity identifiers are checked during import to assess whether you are importing a new activity, or updating an existing one. Be careful to avoid losing data when overwriting existing activities.

3.10.1 1) Export your existing data

As IATI Publisher's import functionality requires complete activities to be uploaded, if you are updating an existing activity, you will need to export the data you have entered for it in the interface first.

1. On the activity listing page, select the activity (or activities) that you want to edit or add data to.
2. Click the download icon to the left of the 'Publish Selected' button.
3. Select which file format you want to work with from the drop-down menu:

The screenshot shows the IATI Publisher interface. At the top, there's a navigation bar with 'iati PUBLISHER' and several menu items: 'ACTIVITY DATA', 'ORGANISATION DATA', 'SETTINGS', 'ADD OR IMPORT ACTIVITY', and 'USERS'. Below the navigation bar, there's a search bar and a '+ ADD ACTIVITY' button. The main content area is titled 'Your activities' and contains a table of activities. The table has columns for 'NO.', 'ACTIVITY TITLE', 'CORE COMPLETENESS', and 'UPDATED ON'. There are five activities listed. The first activity is 'svdgSZGV' with a core completeness of 18.75%. The 'Publish' button for this activity is highlighted with a red box and the number '1'. To the right of the table, there's a 'Publish Selected (3)' button with a download icon. A red arrow points to this icon, and a dropdown menu is open, showing options for 'Download CSV', 'Download XML', and 'Download XLSX'. The 'Download CSV' option is highlighted with a red box and the number '3'. There are also three alerts at the top: '3 Alerts', 'Email address not verified', 'Complete your setup', and 'Organisation is pending approval'.

If you choose XML or CSV, your data file will be prepared in the background and automatically downloaded (this could take up to a few minutes).

If you choose XLSX files, IATI Publisher will show a progress bar as your data files are prepared. You will need to click 'Download' in the bottom-right task box when prompted:

This will download a zipped (compressed) folder containing IATI Publisher's four XLSX templates.

3.10.2 2) Add or edit your data

Once you have exported your activity data, you can edit or add to the exported file as needed, then re-import it to update your activity. Avoid changing the template structure in any way - e.g. by deleting columns or renaming sheets.

See [How do I upload transactions in bulk?](#) as an example.

3.10.3 3) Re-import your data file

You can access the data import pages from 'Add or Import Activity' in IATI Publisher's header. Select the file format from the dropdown menu that you wish to use:

See [Which import template should I use?](#) for help choosing the right template.

Your Activities What is an activity? DOWNLOAD ALL + ADD ACTIVITY

1 Alerts Complete your setup Show more

ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON		
test activity	<div style="width: 18.75%;"><div style="width: 18.75%;"></div></div> 18.75%	a month ago	draft	Publish
Activity with deprecated code	<div style="width: 75%;"><div style="width: 75%;"></div></div> 75%	a month ago	draft	Publish
Corporate Entrepreneurship Responsibility Alliance (CERA)	<div style="width: 68.75%;"><div style="width: 68.75%;"></div></div> 68.75%	2 months ago	published	Unpublish

Support

Background Tasks (1)

Downloading

Zip File is Ready DOWNLOAD

 100%

iatI PUBLISHER ACTIVITY DATA ORGANISATION DATA SETTINGS ADD OR IMPORT ACTIVITY USERS Search activities...

Your activities What is an activity?

All (98) Published (0) Ready for republishing (0) Draft (98)

ADD ACTIVITY MANUALLY
IMPORT ACTIVITIES FROM CSV/XML
IMPORT ACTIVITIES FROM XLSX

DOWNLOAD ALL + ADD ACTIVITY

NO.	ACTIVITY TITLE	CORE COMPLETENESS	UPDATED ON		
1	svdgSZGV	<div style="width: 18.75%;"><div style="width: 18.75%;"></div></div> 18.75%	7 days ago	status	Publish
2	Other International Activities Cross-Cutting	<div style="width: 62.5%;"><div style="width: 62.5%;"></div></div> 62.5%	16 days ago	status	Publish
3	Climate - loss & damage	<div style="width: 50%;"><div style="width: 50%;"></div></div> 50%	16 days ago	status	Publish
4	Lebanon Country Programme 2023-2027, Cross-cutting DEV	<div style="width: 50%;"><div style="width: 50%;"></div></div> 50%	16 days ago	status	Publish

3.10.4 4) Pre-import checks

Once you have uploaded your data, IATI Publisher will list the activities ready for import with information on any data validation errors. These errors are from the [IATI Validator](#).

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.

You will have the chance to confirm the activities that you want to add or overwrite on the 'Import Activity' page:

The screenshot shows the 'Import Activity' page in IATI Publisher. The page has a dark teal header with the IATI Publisher logo and navigation links: ACTIVITY DATA, ORGANISATION DATA, SETTINGS, ADD / IMPORT ACTIVITY (highlighted), and USERS. A search bar and a user profile icon are also present. Below the header, the page title is 'Your Activities' and 'Import Activity'. There is a button 'What is an activity?' and two main buttons: 'CANCEL THIS IMPORT' and 'IMPORT (1/1)'. A table lists the activity:

ACTIVITY TITLE	STATUS	
Championing Inclusivity in Plastic Pollution (CHIPP)	Existing	<input checked="" type="checkbox"/>

The footer contains the IATI logo and 'International Aid Transparency Initiative'. It also lists links for IATI Publisher (Organisation List, About, User Manual v1.1), IATI Standard (IATI Standard, Publishing Checklist, Support, Privacy Policy), and contact information (Part of the IATI Unified Platform, Code licensed under the GNU AGPL, Documentation licensed under CC BY 3.0, ANY QUESTIONS? CONTACT SUPPORT, support@iatistandard.org, and a Support button).

Which import template should I use?

IATI Publisher has activity import templates in CSV and XLSX file format. If you are uploading results data (i.e. results, indicators and periods for existing activities), you will need to use the XLSX import. If you are uploading basic activity data, which can include budgets and transactions, you can choose between the CSV and XLSX imports.

CSV template

IATI Publisher has a single CSV import template, which covers all elements of the IATI Standard for activities apart from [results](#).

This template is recommended if you:

- want to work in a single flat file, rather than a workbook with multiple sheets
- don't need embedded codelists or dropdown menus to enter your data

XLSX templates

There are four templates available on the [XLSX import page](#):

1. Basic Activity Data - covers core and optional IATI data elements for activities, including transactions
2. Results - to import [results](#) for existing activities
3. Indicators - to import [indicators](#) for existing results
4. Periods - to import [periods](#) for existing indicators

These templates are recommended if you:

- prefer to work in a workbook that has multiple sheets (typically one per element of the IATI Standard)
- find embedded codelists and dropdown menus helpful for entering your data
- need help distinguishing between elements of the IATI Standard that require a single entry (e.g. activity status), versus those that accept multiple entries (e.g. budget)

Only one template can be uploaded at a time. It is normally recommended to [export existing activity data](#) before adding to it via the import functionality.

See [How do I complete the XLSX templates?](#) for more guidance.

How do I complete the XLSX templates?

If you are using IATI Publisher's XLSX templates, we recommend [exporting your existing data](#) first, then editing it and re-importing the template.

The XLSX templates are split into sheets, which correspond to different data elements of the IATI Standard.

Tips

- Not all sheets need populating - focus on completing [core data elements](#) first.
- Enter activity identifiers on the 'Settings' sheet to be able to pre-populate them on other sheets. You don't need to populate other columns on the 'Settings' sheet unless you want to override your default values saved in IATI Publisher.
- If you are entering multiple values (e.g. transactions), enter these over multiple rows in the relevant sheet.
- Don't edit sheet or column names, or change the order of columns in a sheet.
- Don't make any edits to the 'Options' sheet.

Column colour-coding

Columns in the XLSX templates are colour-coded based on the number of row entries expected. Note that this only applies if you choose to populate the sheet. [Core elements](#) are mandatory, whereas other sheets in the template are optional.

- Pink - column expects a single entry
- Green - column expects at least one entry, and multiple entries are allowed (e.g. for title narratives in multiple languages)
- Orange - column is optional and expects a single entry if you choose to complete it
- Blue - column is optional and can have multiple entries if you choose to complete it

Importing transactions and results

[How do I import transactions in bulk?](#)

[How do I import results data?](#)

How do I import transactions in bulk?

You can use IATI Publisher's bulk import functionality to add or edit transactions for your existing activities. This involves [exporting your existing activity data](#) first and selecting which file format you want to work with (CSV or XLSX).

- [Importing via CSV](#)

- Importing via XLSX

Importing via CSV

1. Follow the instructions for exporting your activity data in CSV format.
2. In the downloaded CSV file, locate columns AH to BB to view your activity transaction data:

1	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR
2	44	56	Transaction Intei	Transaction Type	Transaction Date	Transaction Value	Transaction Value Date	Transaction Description	Transaction Pr	Transaction Provi	Transaction Provi	Transaction Provi	Transact
3				3	2023-09-08	800000	2023-09-08	Second scheduled payment	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
4				3	2023-03-13	300000	2023-03-13	First payment	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
5				3	2024-05-10	500000	2024-05-10	Third payment	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
6				3	2023-10-31	800000	2023-10-31	2nd disbursement	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
7				3	2023-03-27	400000	2023-03-27	First disbursement	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
8				3	2024-11-25	800000	2024-11-25	Third tranche of UK contribution	XM-DAC-99	10	XM-DAC-99-BPI	Department for E	
9				4	2024-05-31	500000	2024-05-31		XM-DAC-99	10	XM-DAC-99-BPI	Department for E	

3. Add new transaction data on this sheet (one row per transaction). Data on this sheet will overwrite any existing transaction data in IATI Publisher, so make sure that you do not remove rows that you want to keep. Refer to the [transaction type codelist](#) to understand the different numerical codes you can enter in this column.
4. Go to 'Add or Import Activity' from IATI Publisher's header menu, then select 'Import Activities from .CSV/.XML'.
5. Upload your edited CSV file. Your data will be checked and validation feedback given after you click "Upload file".

Importing via XLSX

1. Follow the instructions for exporting your activity data in XLSX format.
2. Wait for the download to be prepared, then click 'Download' in the bottom-right task box when ready:

Your Activities What is an activity? DOWNLOAD ALL + ADD ACTIVITY

1 Alerts Complete your setup Show more

ACTIVITY TITLE	PUBLISHING PROGRESS	UPDATED ON		
test activity	18.75%	a month ago	draft	Publish
Activity with deprecated code	75%	a month ago	draft	Publish
Corporate Entrepreneurship Responsibility Alliance (CERA)	68.75%	2 months ago	published	Unpublish

Background Tasks (1)

Downloading

Zip File is Ready 100% DOWNLOAD

3. Within the zipped folder downloaded, extract and open the file titled "activity.xlsx".
4. Locate the 'Transaction' sheet within the workbook. Add new transaction data on this sheet, ensuring one row per transaction. Data on this sheet will overwrite any existing transaction data in IATI Publisher, so make sure that you do not remove rows that you want to keep. Save the XLSX file when finished.

A	B	C	D	E	F	G	H	I	J
Activity Identifier	Reference	Humanitarian	Transaction Type Code	Transaction Date Date	Value Value	Value Value Date	Value Currency	Description Narrative	Description Lar
EXAMPLE-20212025	004	FALSE	4 - Expenditure	2022-02-28	2540	2022-02-28	GBP - Pound Ste	Activity Expenditure for December 2021-February 2022	en - English
	005	FALSE	4 - Expenditure	2022-05-31	85015	2022-05-31	GBP - Pound Ste	Activity expenditure for March-May 2022	en - English
	006	FALSE	4 - Expenditure	2022-08-31	388676	2022-08-31	GBP - Pound Ste	Activity expenditure for June-August 2022	en - English
	007	FALSE	4 - Expenditure	2022-11-30	6587584	2022-11-30	GBP - Pound Ste	Activity expenditure for September-November 2022	en - English
	001	FALSE	11 - Incoming Commitment	2021-11-30	3171000	2021-12-03	GBP - Pound Ste	Project contract signed	en - English
	003	FALSE	1 - Incoming Funds	2022-02-11	4313466	2022-02-11	GBP - Pound Ste	Incoming funds	en - English
	002	FALSE	1 - Incoming Funds	2021-12-08	340000	2021-12-08	GBP - Pound Ste	Incoming funds	en - English
	008	FALSE	2 - Outgoing Commitment	2022-11-30	491314	2022-11-30	GBP - Pound Ste	Funds committed to activities in Liberia	en - English
	010	FALSE	3 - Disbursement	2022-02-28	386456	2022-02-28	GBP - Pound Ste	Funds committed to activities in Liberia	en - English
	009	FALSE	2 - Outgoing Commitment	2022-01-28	179208	2022-09-30	GBP - Pound Ste	Funds committed to project activities in Sierra Leone	en - English

- Go to 'Add or Import Activity' from IATI Publisher's header menu, then select 'Import Activities from .XLSX'.
- On the 'Import Activities from .XLSX' page, select that you want to import "Basic Activity Elements", then upload your edited XLSX file. Your data will be checked and validation feedback given after you click "Upload file":

Please select one to continue

- Basic Activity Elements**
Select this to add or edit activities in IATI Publisher. The "basic activity elements.xlsx" template covers core and optional data elements for activities, including transactions, and can be downloaded below.
- Results**
Select this to upload results for existing activities in IATI Publisher. The "results.xlsx" template covers the activity result element only. Separate templates are available for indicator and period data.
- Indicators**
Select this to upload indicators for existing results in IATI Publisher. The "indicators.xlsx" template covers indicators for results only. Separate templates are available for result and period data.
- Periods**
Select this to upload periods for existing indicators in IATI Publisher. The "period.xlsx" template covers periods for indicators only. Separate templates are available for result and indicator data.

IATI Publisher uses identifiers to uniquely identify results, indicators, and periods. If you are working with results data, download these to use in your import templates.
[Download Result Identifiers](#)

Choose File **activity.xlsx** **UPLOAD FILE**

Refer to the IATI Publisher import manual for help with this process.
[Read our import manual](#) | [Download XLSX activity templates](#)

How do I import results data?

Activity results data can be imported to IATI Publisher via XLSX files. There is a separate XLSX template to use for each of results, indicators and periods.

Instead of populating the blank XLSX templates, it is typically easiest to add at least one result, indicator and period via IATI Publisher's interface first. This way, you can **export your existing activity data** and see how it appears in each of IATI Publisher's XLSX templates. You can then add to or edit the data as required, before re-importing.

What information do I need in the import templates?

1) Result template

The *Result_Mapper* sheet contains the following three columns:

- **Activity Identifier** - this is used to associate your result with the right activity in IATI Publisher. The activity identifier is the second part of the 'iati-identifier' string, which uniquely identifies each of your activities within your organisation's data.
- **Result Number** - a number or text string that uniquely identifies each result within a particular activity. You can choose what this string is if creating a new result via the import template. Results created within the IATI Publisher interface will have their result number automatically created by the system.
- **Result Identifier** - this is autopopulated in the Result import template, based on the Activity Identifier and Result Number entered in the previous columns.

2) Indicator template

The *Indicator_Mapper* sheet contains the following three columns:

- **Result Identifier** - this is used to associate your indicator with the right result in IATI Publisher.
- **Indicator Number** - a number or text string that uniquely identifies each indicator within a particular result (similar to Result Number).
- **Indicator Identifier** - this is autopopulated in the Indicator import template, based on the Result Identifier and Indicator Number entered in the previous columns.

3) Period template

The *Period_Mapper* sheet contains the following three columns:

- **Indicator Identifier** - this is used to associate your period with the right indicator in IATI Publisher.
- **Period Number** - a number or text string that uniquely identifies each period within a particular indicator (similar to Indicator Number).
- **Period Identifier** - this is autopopulated in the Period import template, based on the Indicator Identifier and Period Number entered in the previous columns.