IATI TAG 2018, Kathmandu

Day 3 Session 20: Understanding IATI Upgrades - and how to contribute

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What to expect from this workshop?

Aim: To provide participants with knowledge on the new upgrade process and to test how it works in practice

Outcome: Participants are clear on how the upgrade process works and feel confident to submit an upgrade proposal.

In this workshop we will: Focus on the process, collaborate, ask questions and suggest improvements to the upgrade process

In this workshop we will not: Focus on resolving specific proposals.
Workshop outline

Part 1: Understand the current upgrade process and rules. What does this mean for you as a member of the IATI community?

Part 2: Hands on sessions - submit an upgrade proposal in plain English and get involved in a practice upgrade consultation.

Part 3: Share feedback and suggest improvements to the process.
Part 1: Why do we need upgrades and how do they work?
# Upgrade process timeline - 1.02

<table>
<thead>
<tr>
<th>IATI</th>
<th>Timescale</th>
<th>Due Date</th>
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<tbody>
<tr>
<td>Community submit proposals</td>
<td>To be done by</td>
<td>1 Jun</td>
</tr>
<tr>
<td>Tech team agree which proposals should go forward</td>
<td>Usually within 1 week</td>
<td>6 Aug</td>
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<tr>
<td>Consultation</td>
<td>Over a two week period</td>
<td>31 Aug</td>
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<tr>
<td>Build proposals into fully implemented examples</td>
<td>Within 1 week</td>
<td>7 Sept</td>
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<tr>
<td>Community consultation</td>
<td>Over a 4 week period</td>
<td>28 Sept</td>
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<tr>
<td>Publish final proposals</td>
<td>Within 2 weeks</td>
<td>12 Oct</td>
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Why do we need upgrades?

- IATI standard is a living entity - it requires improvement over time
- IATI standard needs to meet the needs of all stakeholders - it needs to be flexible
- IATI standard needs to be useful and usable by all stakeholders
- Changes to the standard will be driven by the suggestions and experiences of the publishers and users of IATI data
- So far eight upgrades have been completed (version 1.01 to 2.03)
  - version 2.03 went live in February 2018
Types of upgrades

Minor Upgrades

The Governing Board is responsible for initiating, overseeing and approving the upgrade. Minor upgrades can include:

★ Bug-fixes, including resolution of spelling and grammar errors (where edits have implications for usage and/or meaning)
★ Modifications to embedded codelists
★ Minor additions to the standard which improve the functionality without introducing substantial new content
★ All changes are optional and backwardly compatible.

Major Upgrades

The Members’ Assembly is responsible for initiating and approving the upgrade, whilst the Governing Board oversees the progress. Major upgrades can include:

★ Substantial additions to the Standard
★ New mandatory fields
★ Changes that are not backwardly compatible
The upgrade process

Phase 1: Content (what). This refers to the real-world use case. What problem will the change solve.

Phase 2: Technical implementation (how). This refers to the translation of the content into the syntax required by schema/codelist/rule. How do we solve the problem?
Part 2: How you can contribute to minor or major upgrade

Hands-on exercise (40 mins)
Hands on session

❖ Split into groups

❖ Each group prepares a proposal for a standard upgrade procedure using the upgrade TEMPLATE
   ➢ Option 1: Choose an existing element or attribute and create a proposal for its inclusion
   ➢ Option 2: You can prepare a proposal that is not relevant to the IATI standard

❖ Each group nominates 1 or 2 members to present their upgrade proposal to the IATI community.

❖ The groups then take part in the IATI upgrade content consultation and try to reach a consensus.

❖ Proposals then go to the Governing Board (minor) or Members’ Assembly (major) for approval.

N.B. The aim of the session is to focus on the process and think about areas for improvements.
Upgrade content consultation begins

Feedback and ideas for improving the upgrade process (Phase 1)?