

IATI TAG 2018, Kathmandu

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

Petya Kangalova & Amy Silcock
IATI tech team
15 November 2018

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

IATI	Timescale	Due Date
Community submit proposals	To be done by	1 Jun
Tech team agree which proposals should go forward	Usually within 1 week	6 Aug
Consultation	Over a two week period	31 Aug
Build proposals into fully implemented examples	Within 1 week	7 Sept
Community consultation	Over a 4 week period	28 Sept
Publish final proposals	Within 2 weeks	12 Oct

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:

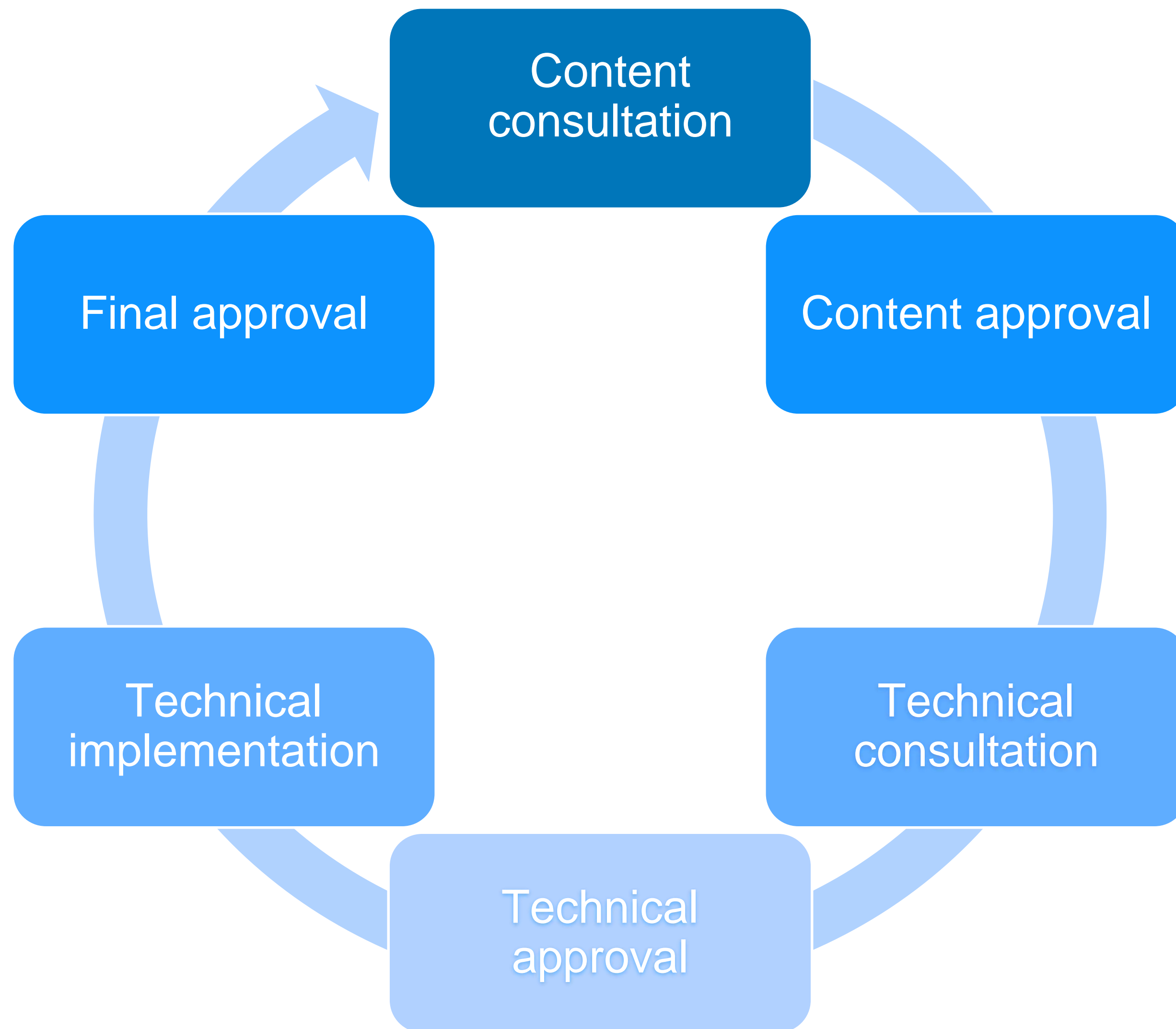
- ★ **Bug-fixes, including resolution of spelling and grammar errors (where edits have implications for usage and/or meaning)**
- ★ **Modifications to embedded codelists**
- ★ **Minor additions to the standard which improve the functionality without introducing substantial new content**
- ★ **All changes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



<https://www.agilefire.com/free-consultation-request-form/>

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