dxw.

We will start soon

40 min for show and tell
5 min for questions

We're recording!

Department for
Business, Energy
& Industrial Strategy

dxw.

BEIS RODA
Show and Tell

RODA 3.0 Sprint 4

25th October 2022

Project purpose and team

Department for
Business, Energy
& Industrial Strategy

Project goals

In this phase, we aim to:

- Support the new International Science Partnerships Fund (ISPF) seamlessly in the service
- Improve the user experience
- Introduce metrics that help us understand how effectively money is being spent and
- Meet transparency standards more easily

Why now?

- The ISPF means RODA needs to support non-ODA finance
- It's due to launch Spring '23
- We'd like a minimum viable product (MVP) by the end of the year

Department for Business, Energy & Industrial Strategy

Team

Cristina Rotaru
Developer

Gaz Aston
Design Lead

George Eaton
Technical Lead

Sam Opera
User Research Lead

Ynda Jas
Developer

Jamieson Carey / Katherine Axel
Delivery Leads (jobshare)

Dan Sparks
RODA Service Lead

Meena Balija
RODA Product Owner

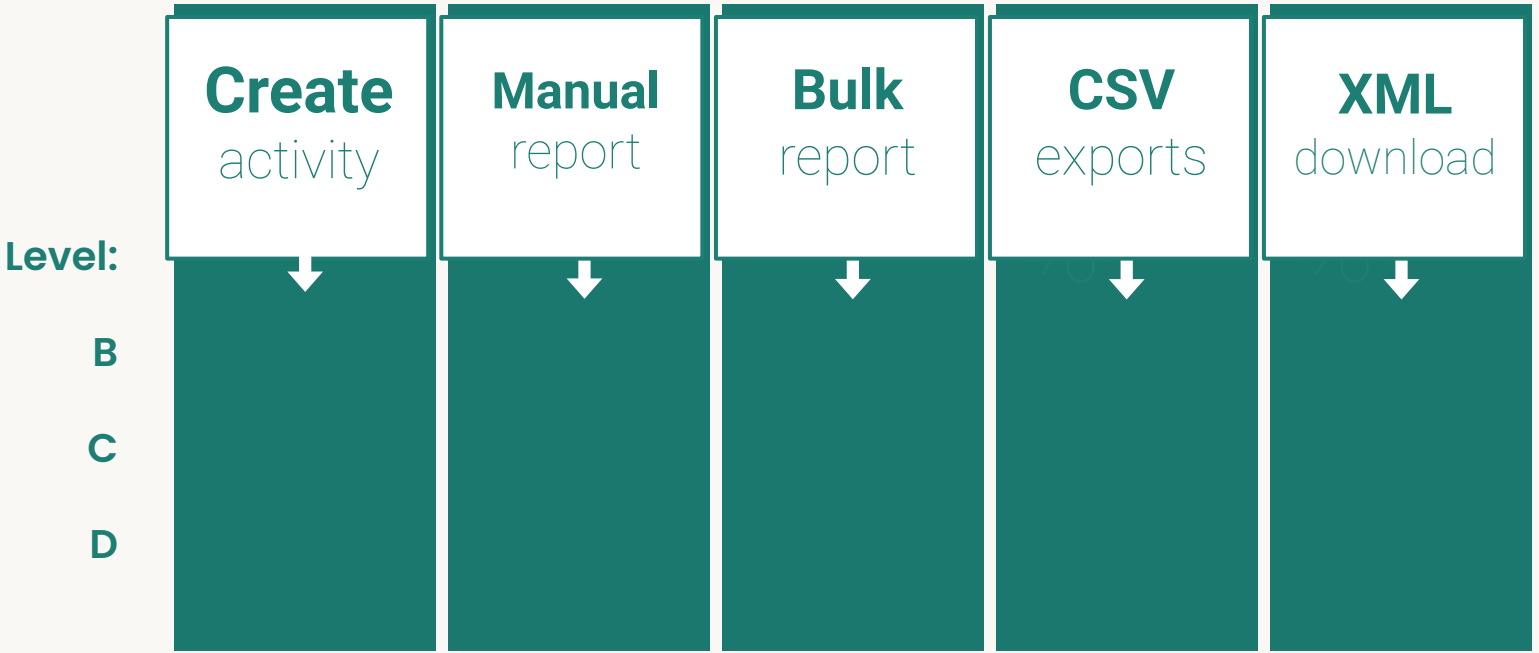
Samantha Stratford
RODA Service Manager

Department for Business, Energy & Industrial Strategy

New fund

Department for
Business, Energy
& Industrial Strategy

Features to support the new fund



ODA + Non-ODA activities to be supported

Department for Business, Energy & Industrial Strategy

How we'll do it

1

Clone a new Level A

Add a level A ISPF activity through the database

2

Customise screens

- ODA/non-ODA?
- ISPF Partner countries
- ISPF theme
- Implementing organisation

3

Bulk upload

Put the new fields into the bulk upload

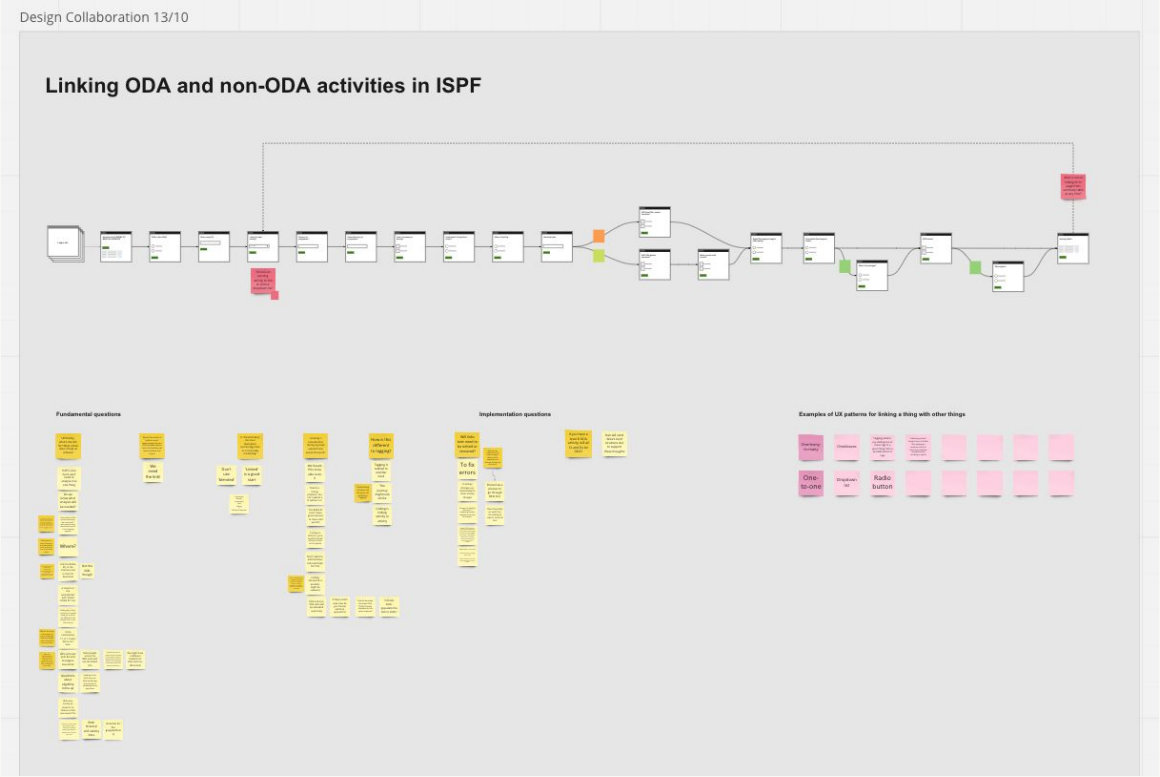
4

Downloads

Include new fields in CSV exports

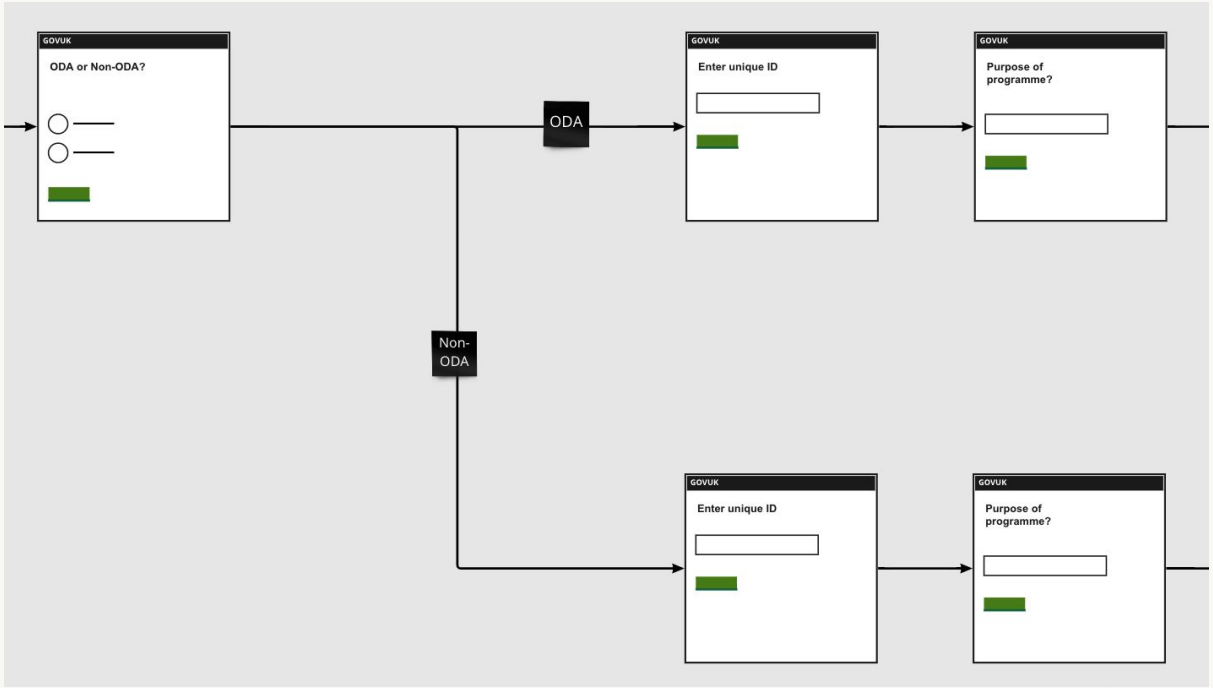
Department for Business, Energy & Industrial Strategy

Linking activities



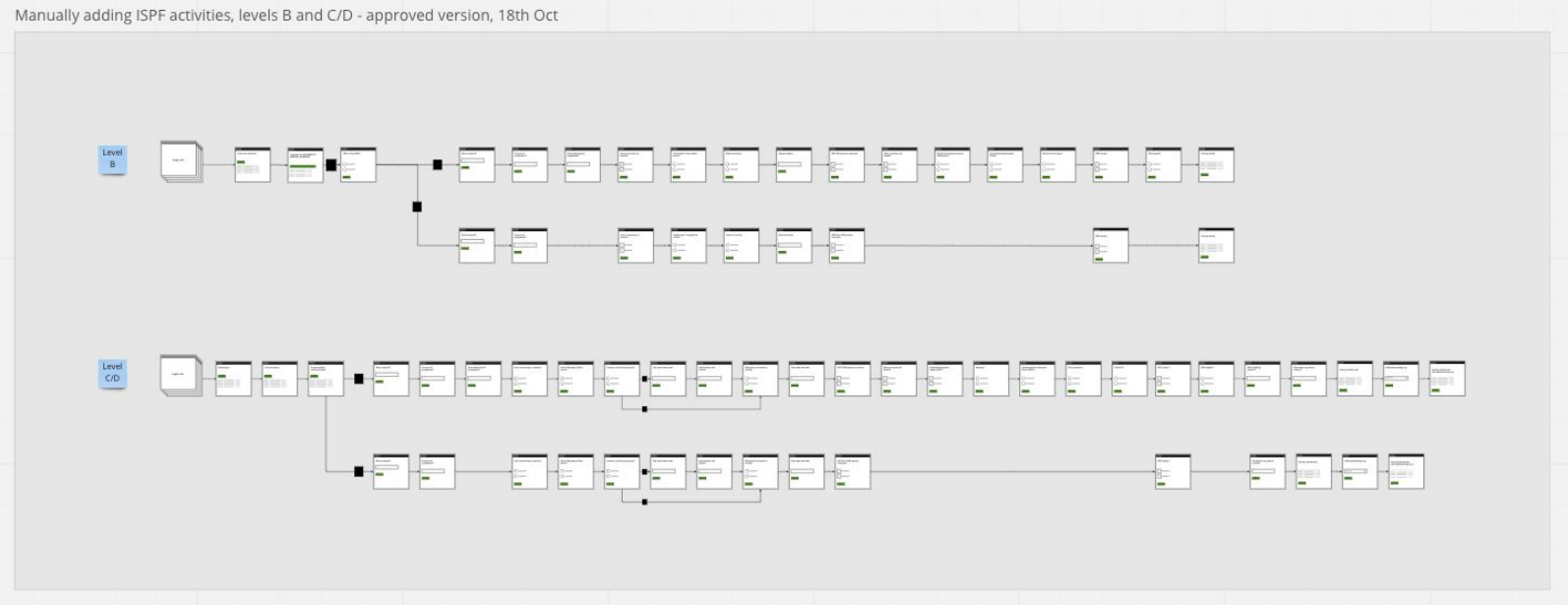
Department for Business, Energy & Industrial Strategy

A word on prototyping



Department for Business, Energy & Industrial Strategy

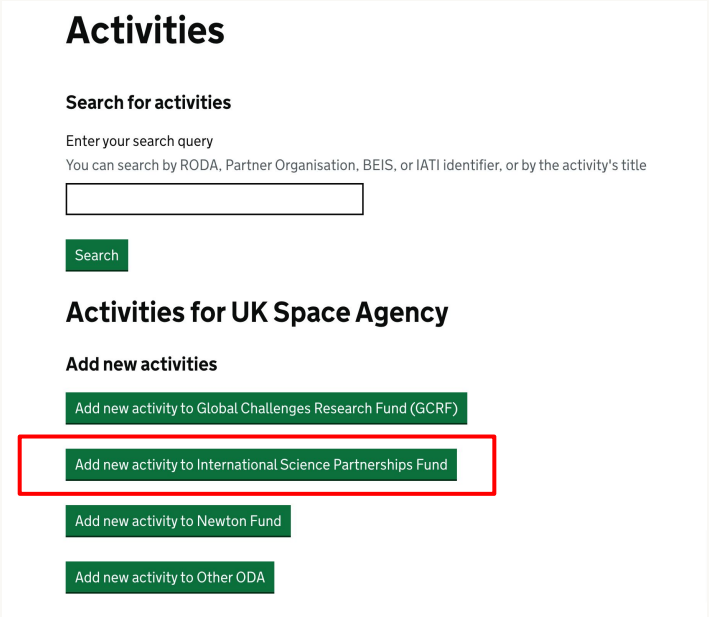
Quicker decision making



Department for Business, Energy & Industrial Strategy

Build progress

- We've added a data migration for the new Level A ISPF activity
- This has given us a template journey (currently a combination of the level B & C journeys) for adding a new ISPF activity, which we'll hide from users until the new fund is finished
- We'll focus on customising this journey according to the activity level and ODA/non-ODA type in the next sprint



Department for Business, Energy & Industrial Strategy

Importing Level B Budgets

Department for
Business, Energy
& Industrial Strategy

Budget Importer

Currently BEIS users can add budgets at level B. However, this process is done manually and can be a time consuming task for users.

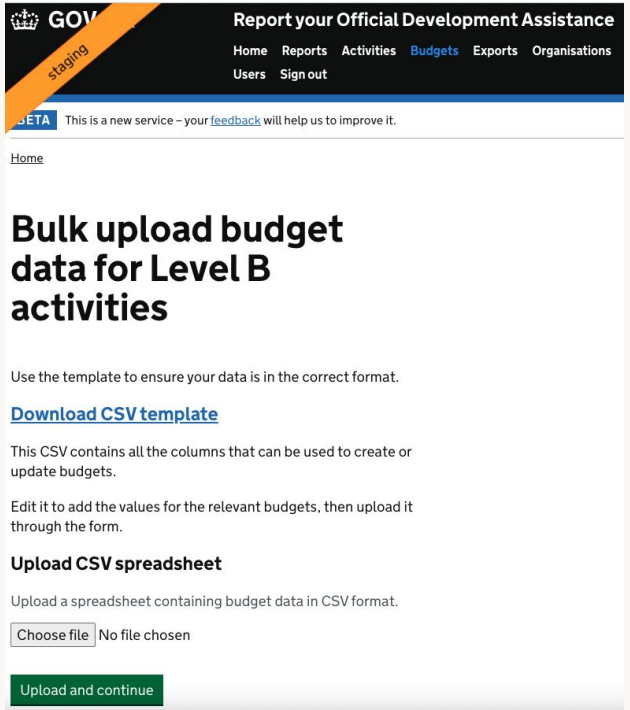
We had a requirements session and design collab with BEIS in order to understand what features are needed and what it would look like.

We then created a first iteration prototype and tested it with users.

Department for
Business, Energy
& Industrial Strategy

Budget import – Route in

Users were able to easily find the budget heading and knew instinctively to click on the “download CSV template” button.



Department for Business, Energy & Industrial Strategy

Budget import - CSV template

Level_B_budgets_upload

Type	Financial year	Budget amount	Providing organisation	Providing organisation type	IATI reference	Activity RODA ID	Fund RODA ID	Partner organisation name

Fund RODA ID refers to Level A funding, users felt that this field was not needed as it would already be included in the activity RODA ID.

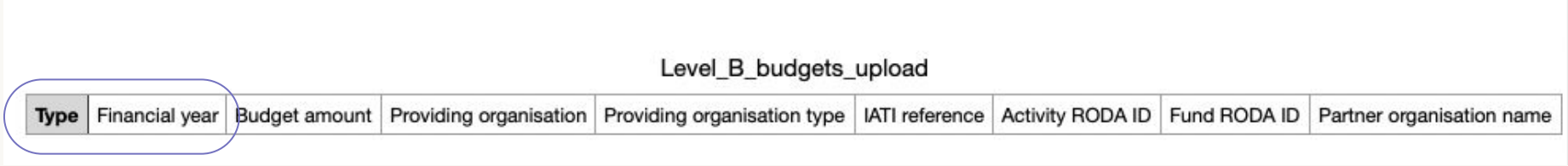
There were also concerns that **Partner Org Name** also does not need to be within the template.

"I don't understand Fund RODA ID, as GCRF and newton funds are not an ID. They are the Level A funds."

"I'm not sure I'd necessarily want the partner organisation's name in there, are these all mandatory? I have a partner org id on our internal source sheet, so might not need it"

Department for Business, Energy & Industrial Strategy

CSV template – Error page on UI



Level_B_budgets_upload

Type	Financial year	Budget amount	Providing organisation	Providing organisation type	IATI reference	Activity RODA ID	Fund RODA ID	Partner organisation name

The Budget **type** code was not valid - Users originally entered "ODA", instead of "0".
(0 - Direct or 1 - ODA")

Users mentioned the need for **clear guidance** on zendesk in order to be successful in the upload.

There is less margin for error when using numbers as opposed to typing free text.

Financial year: User entered 2023 instead of 2023-2024. Need for clear guidance.

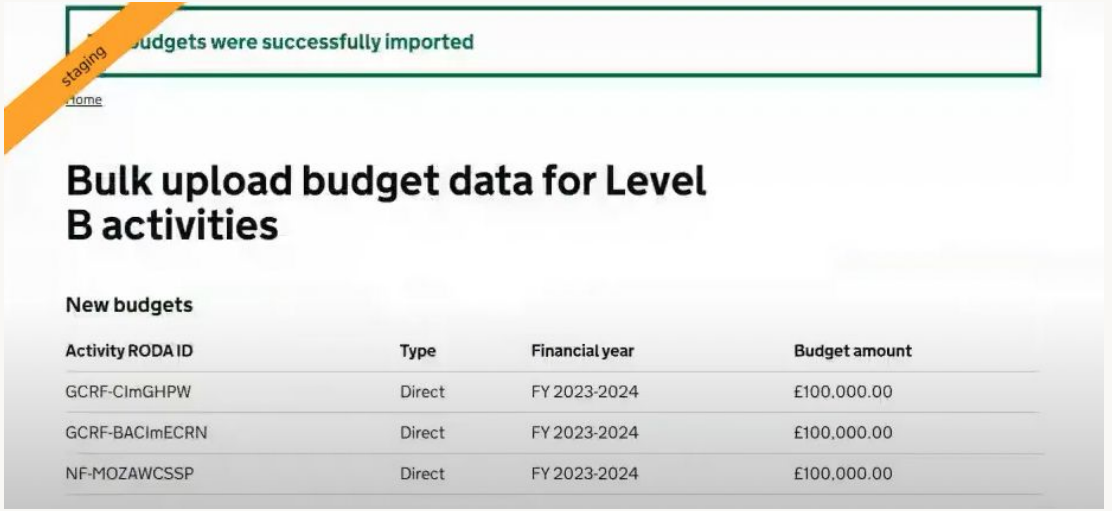
"As long as there is guidance on zendesk, then entering the data should be fine"

Department for Business, Energy & Industrial Strategy

Confirmation of upload

User would then export budget reports by fund, in order to check that **what they have entered is in the correct column** and that the totals are correct.

The ability to **edit and/or delete** a budget was also acknowledged by users.



"Because you can add multiple budgets per year - if you reupload (e.g. if you make an error) it will duplicate. If you want to remove it, you need to go in and delete it manually"

Department for Business, Energy & Industrial Strategy

Comments

Users need to **add comments to budgets** as it would be helpful for BEIS users to differentiate between different sorts of budgets.

Having comments is a way of future proofing and helps with the QA process as well as being able to demarcate budgets if more funding comes in (Extra allocations).

"Without comments it is a bit like working in the dark".

CSV Column refinements

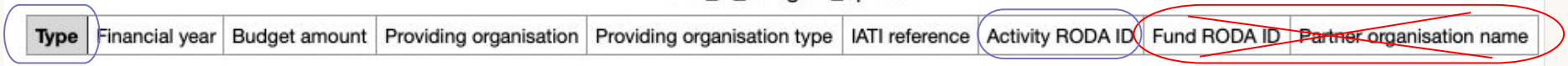
BEFORE

Reordered

Level_B_budgets_upload

Reordered

Removed Columns



*"Good practice is to have **Activity RODA ID**, in column A, comes alot from database management"*

"The **Fund RODA ID** is already within the Activity RODA ID, so no need for that column"

"I don't think it's necessary for **Partner Org name**, if it was optional I would leave it out"

AFTER

Level_B_budgets_upload (1)

*"It makes more sense if '**Type**' were followed with providing org, providing org type and IATI reference. Populated if type is 1 - OODA"*

Department for Business, Energy & Industrial Strategy

What next?

- Analyse and Scope out needs for Level C and D budget imports, so that we can build a first iteration.

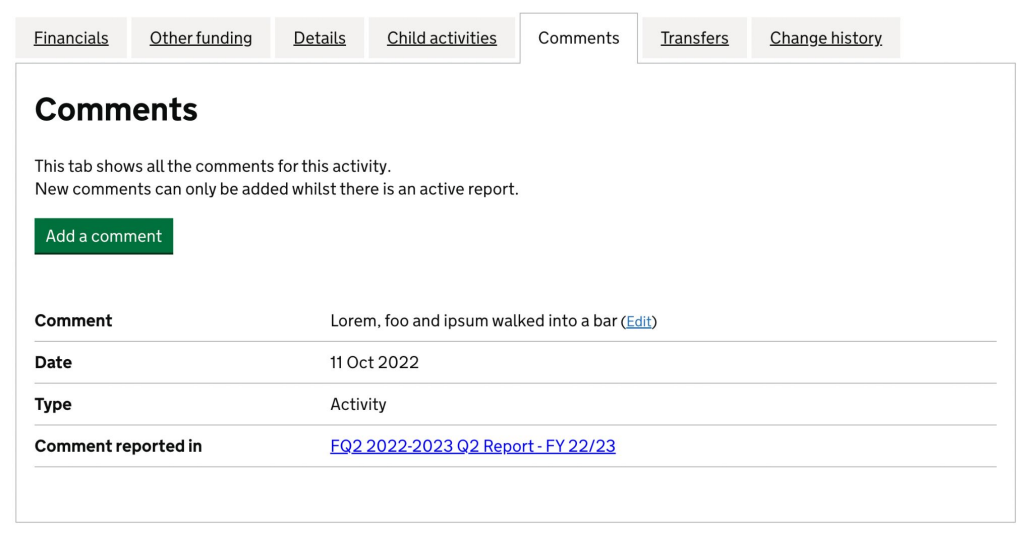
Commenting on Level B Activities

Department for Business, Energy & Industrial Strategy

Levels C and D commenting

Commenting on activities via the UI was was previously only available:

- at Levels C and D
- for users from partner organisations
- on activities tied to an open report



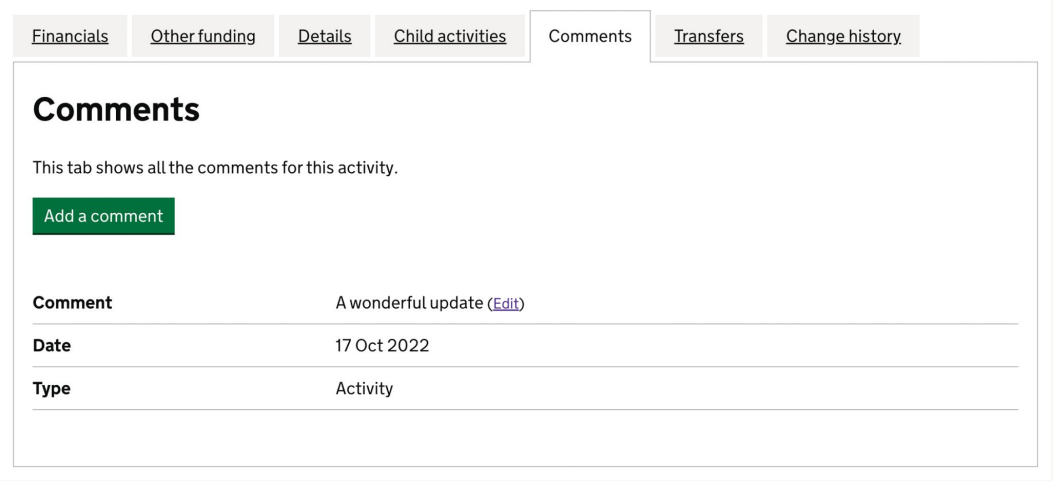
Department for Business, Energy & Industrial Strategy

Level B commenting

Useful for BEIS users to be able to:

- add comments on Level B activities, e.g. relating to budgets
- via the UI and bulk upload
- whether or not there's an open report

New functionality allows for this in the UI



Department for Business, Energy & Industrial Strategy

Demo

Department for
Business, Energy
& Industrial Strategy

What next?

- Add ability to bulk upload comments on Level B activities
- Gather feedback on the UI and bulk upload processes and iterate if necessary

Department for
Business, Energy
& Industrial Strategy

Building the new fund without disrupting the live service

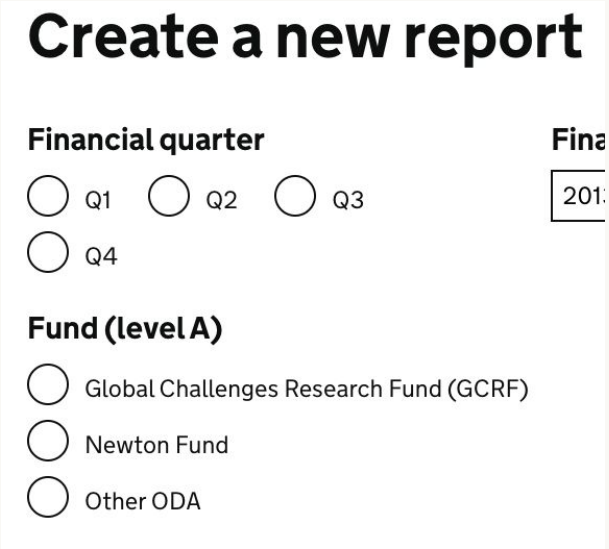
Department for Business, Energy & Industrial Strategy

The ISPF can be hidden

dxw.

before

after



ISPF reports can be hidden

dxw.

Reports

Current reports

Financial quarter	Deadline	Status	Fund (level A)	Description	Can edit?	
FQ4 2021-2022		Active	ISPF	First ISPF report on RODA	Yes, data can be added/edited	View
		Active	NF	much testing	Yes, data can be added/edited	View

before

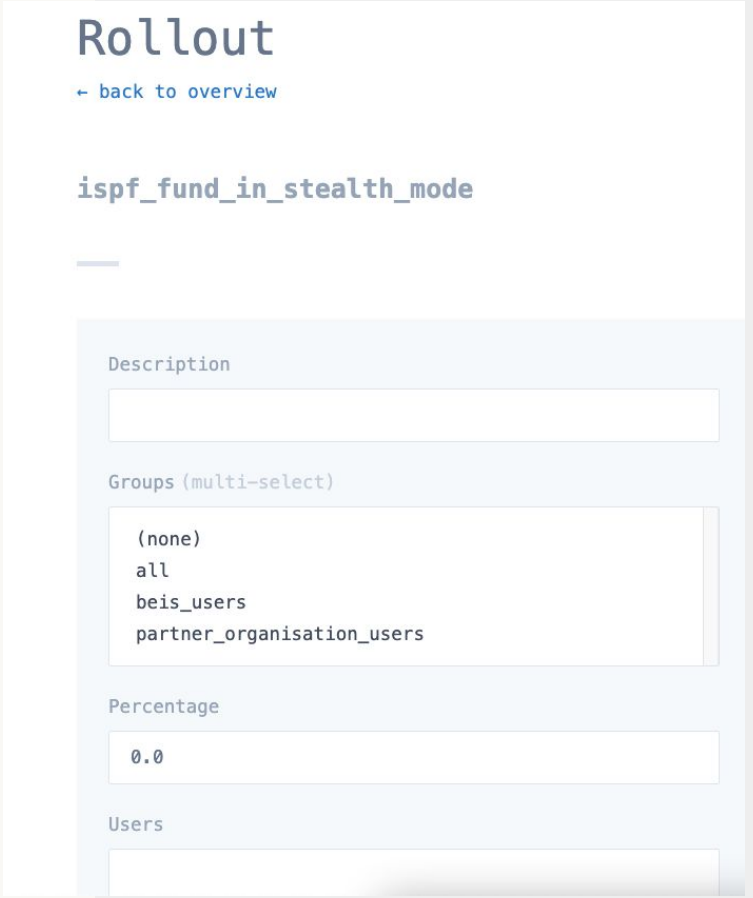
after

Reports

Current reports

Financial quarter	Deadline	Status	Fund (level A)	Description	Can edit?	
		Active	NF	much testing	Yes, data can be added/edited	View

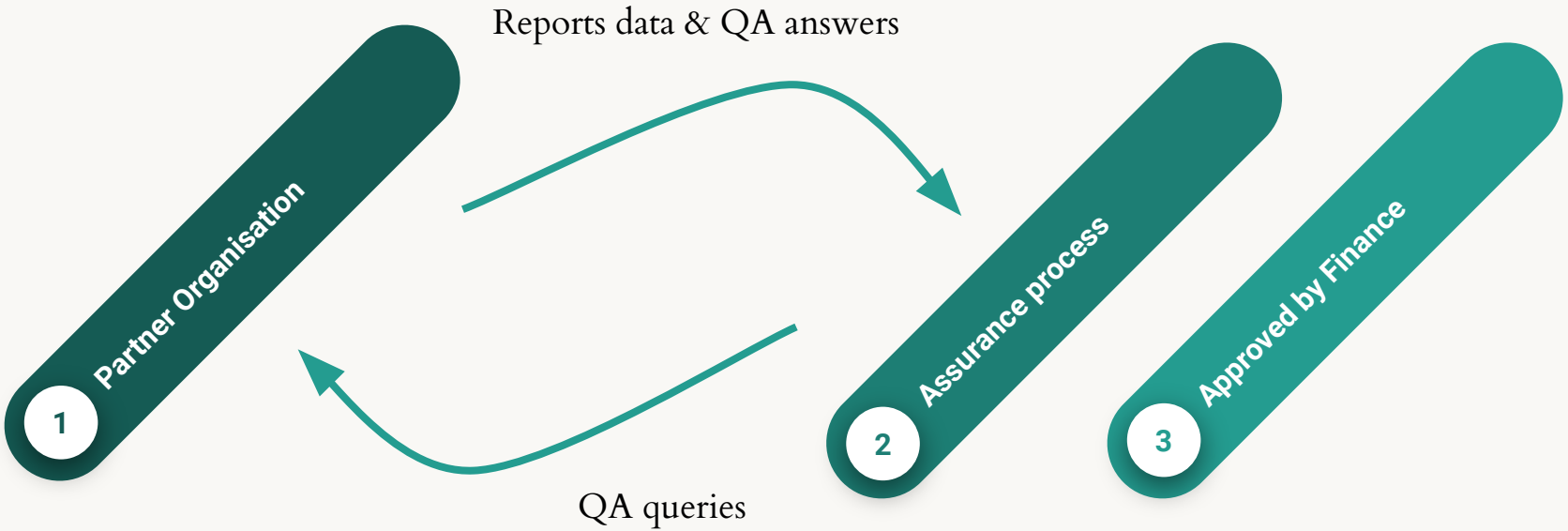
The feature is controlled by BEIS users via the UI



Preventing QA queries

Department for
Business, Energy
& Industrial Strategy

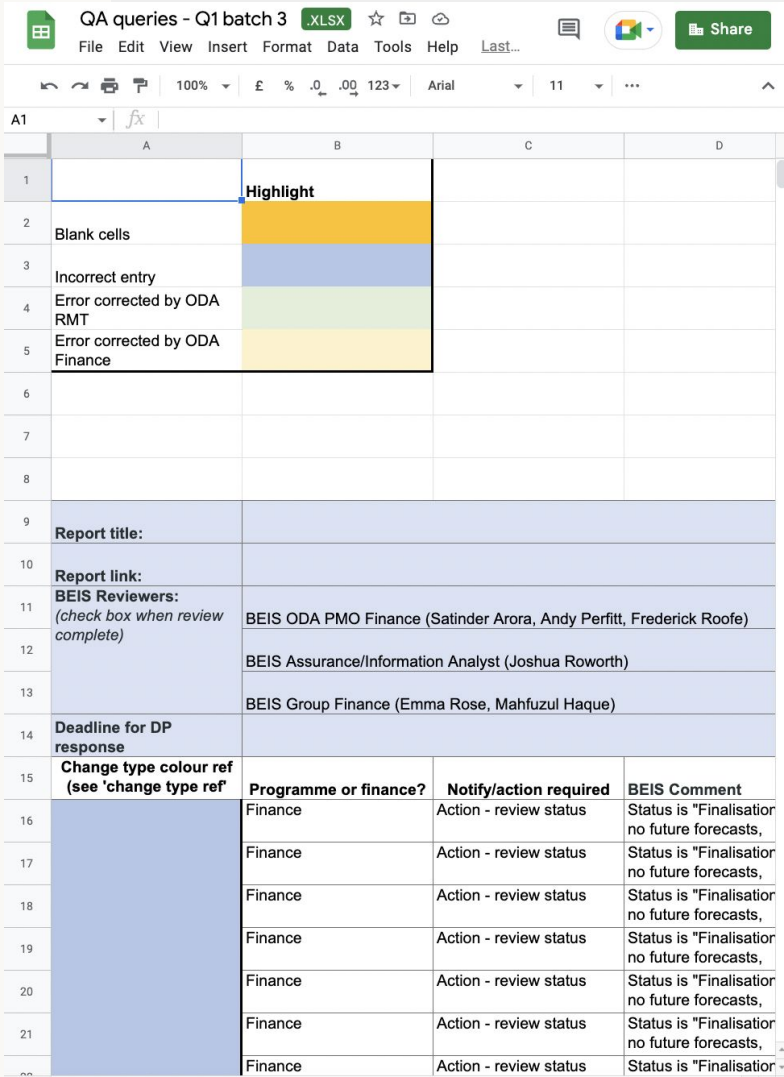
Report Quality Assuring (QA) queries



Department for
Business, Energy
& Industrial Strategy

76% of QA queries in Q1:

"The forecasts seem incongruent with the status"



QA queries - Q1 batch 3 .XLSX

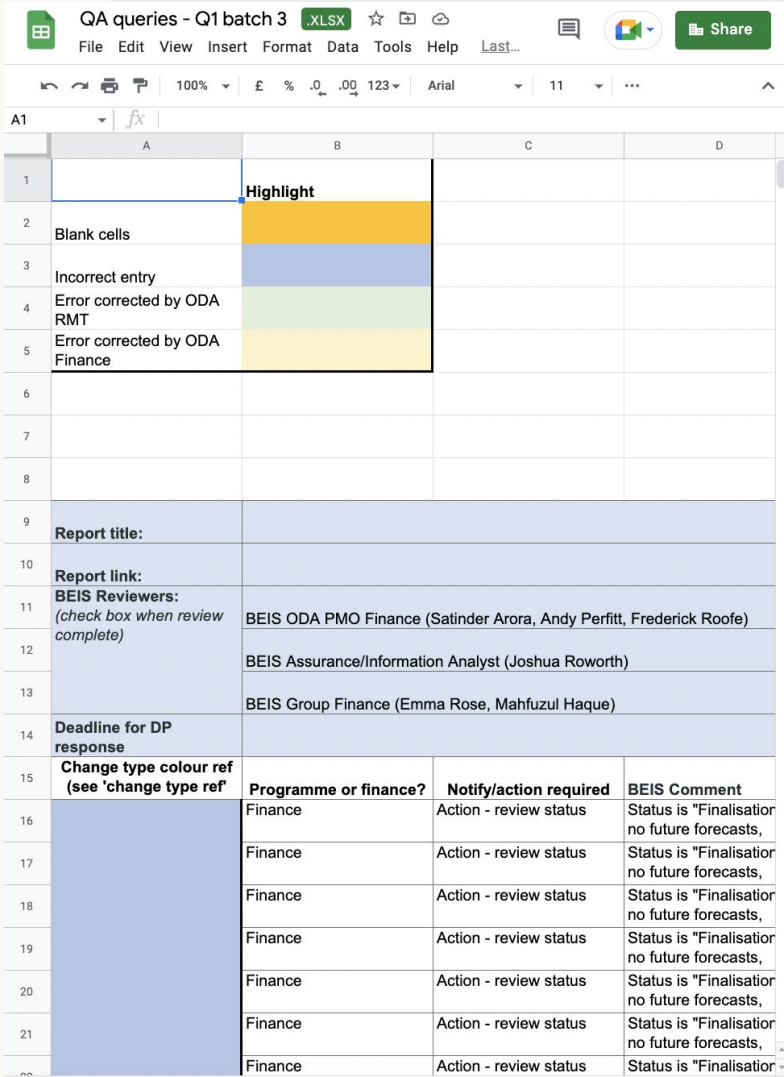
File Edit View Insert Format Data Tools Help Last...

Share

	A	B	C	D
1		**Highlight**		
2	Blank cells			
3	Incorrect entry			
4	Error corrected by ODA RMT			
5	Error corrected by ODA Finance			
6				
7				
8				
9	**Report title:**			
10	**Report link:**			
11	**BEIS Reviewers:** *(check box when review complete)*	BEIS ODA PMO Finance (Satinder Arora, Andy Perfitt, Frederick Roofe)		
12		BEIS Assurance/Information Analyst (Joshua Roworth)		
13		BEIS Group Finance (Emma Rose, Mahfuzul Haque)		
14	**Deadline for DP response**			
15	**Change type colour ref (see 'change type ref'**	**Programme or finance?**	**Notify/action required**	**BEIS Comment**
16		Finance	Action - review status	Status is "Finalisation no future forecasts,
17		Finance	Action - review status	Status is "Finalisation no future forecasts,
18		Finance	Action - review status	Status is "Finalisation no future forecasts,
19		Finance	Action - review status	Status is "Finalisation no future forecasts,
20		Finance	Action - review status	Status is "Finalisation no future forecasts,
21		Finance	Action - review status	Status is "Finalisation no future forecasts,
		Finance	Action - review status	Status is "Finalisation

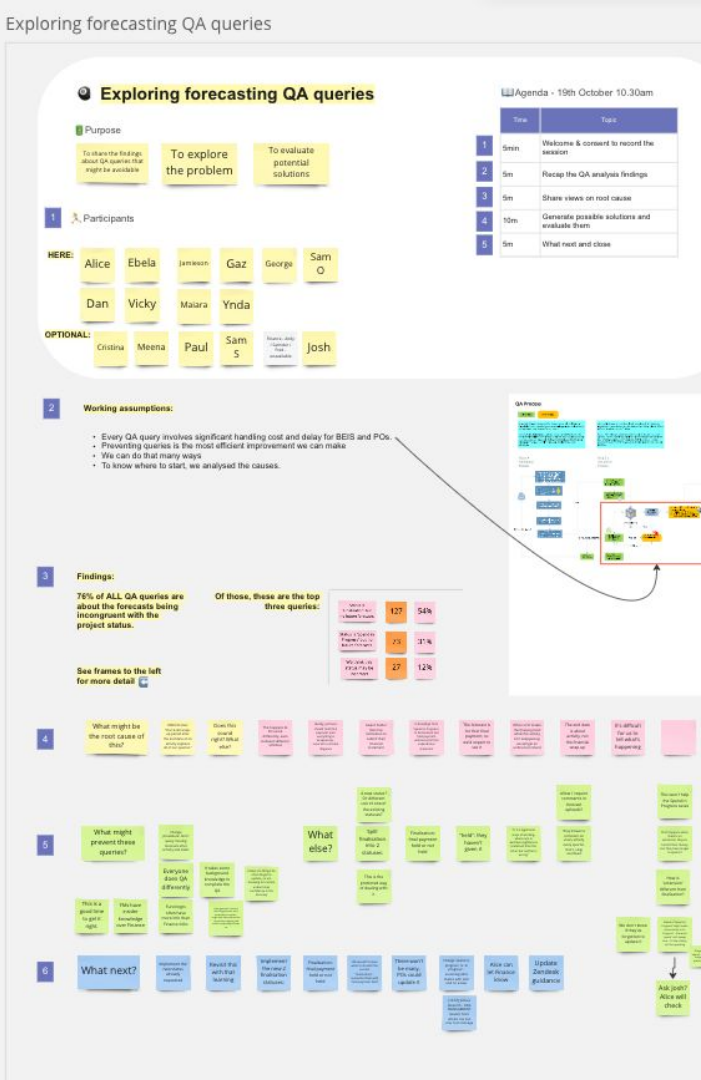
Over half of these:

“The status is ‘finalisation’ but there are no future forecasts”

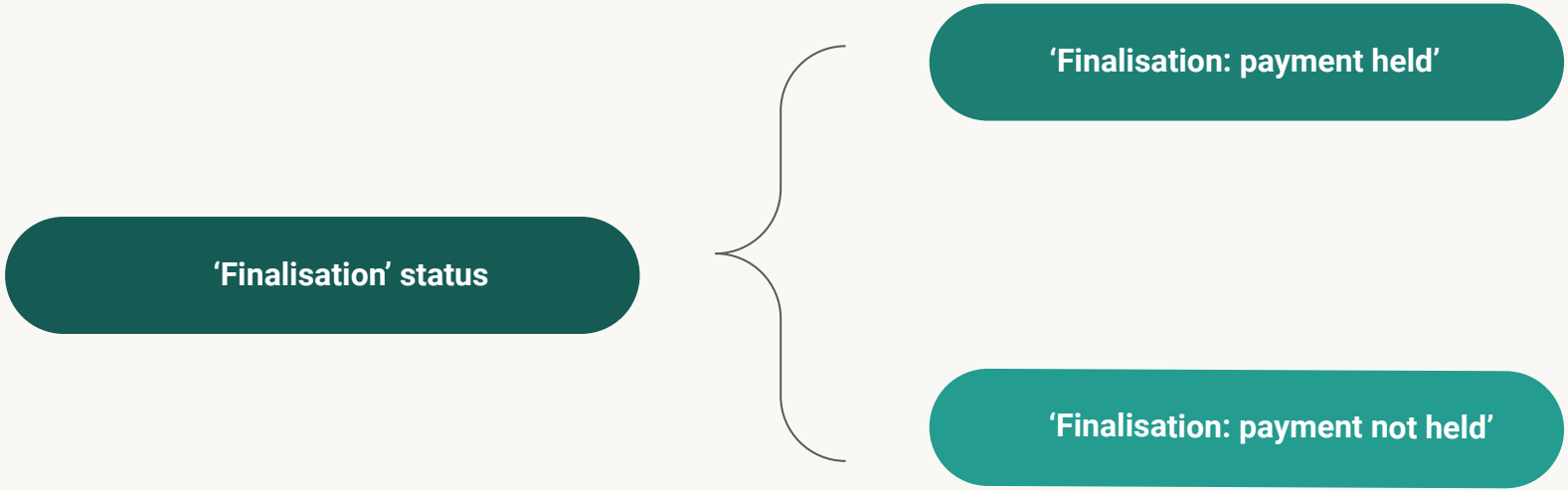


Why?

- In theory, POs hold the final payment until they've received the final expenditure statement
- So: we expect a forecast after the end date of the activity
- Some pay it early, so have no forecasts to report



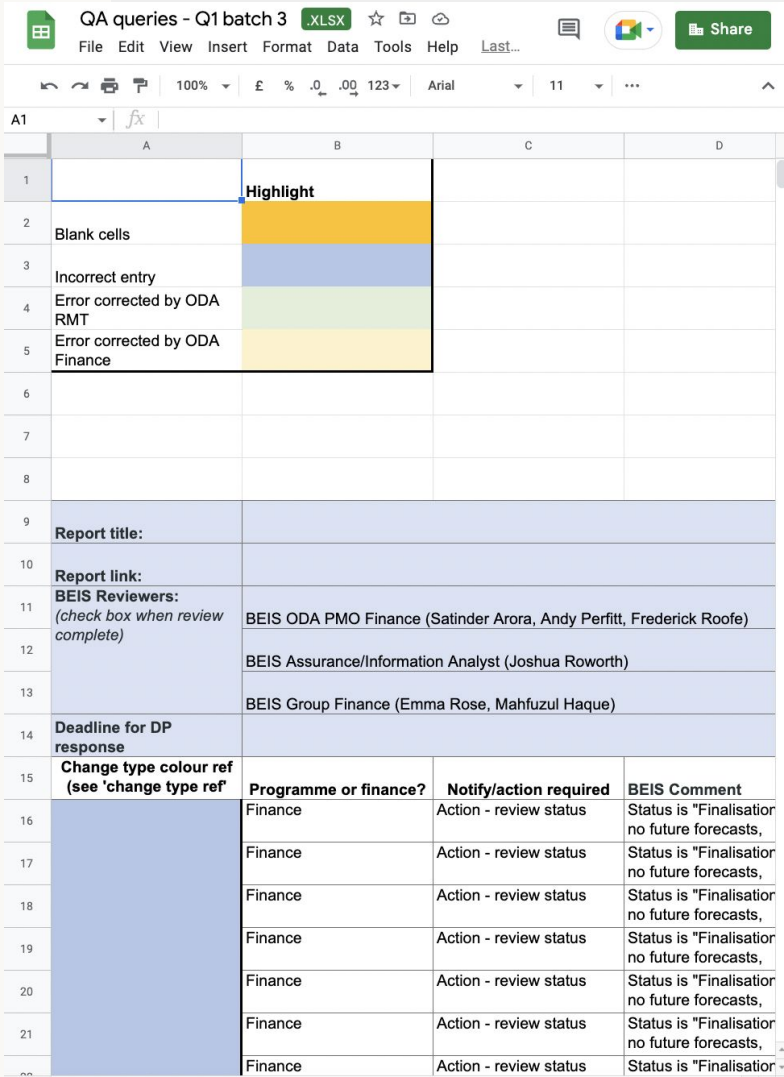
Proposal: split the status in two



Department for Business, Energy & Industrial Strategy

A third of the status queries:

"The status is 'Spend in progress' but there are no future forecasts"



QA queries - Q1 batch 3 .XLSX

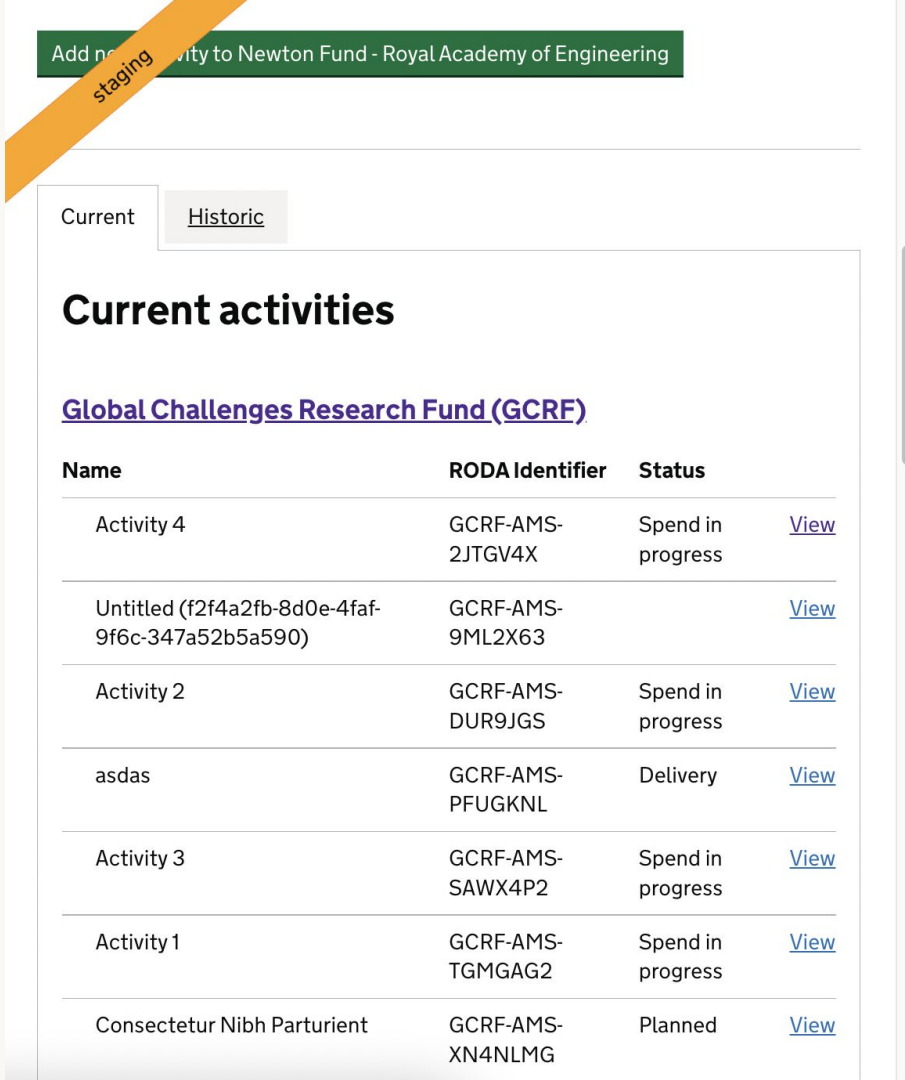
File Edit View Insert Format Data Tools Help Last...

Share

	A	B	C	D
1		**Highlight**		
2	Blank cells			
3	Incorrect entry			
4	Error corrected by ODA RMT			
5	Error corrected by ODA Finance			
6				
7				
8				
9	**Report title:**			
10	**Report link:**			
11	**BEIS Reviewers:** *(check box when review complete)*	BEIS ODA PMO Finance (Satinder Arora, Andy Perfitt, Frederick Roofe)		
12		BEIS Assurance/Information Analyst (Joshua Roworth)		
13		BEIS Group Finance (Emma Rose, Mahfuzul Haque)		
14	**Deadline for DP response**			
15	**Change type colour ref (see 'change type ref'**	**Programme or finance?**	**Notify/action required**	**BEIS Comment**
16		Finance	Action - review status	Status is "Finalisation no future forecasts,
17		Finance	Action - review status	Status is "Finalisation no future forecasts,
18		Finance	Action - review status	Status is "Finalisation no future forecasts,
19		Finance	Action - review status	Status is "Finalisation no future forecasts,
20		Finance	Action - review status	Status is "Finalisation no future forecasts,
21		Finance	Action - review status	Status is "Finalisation no future forecasts,
		Finance	Action - review status	Status is "Finalisation

Why?

- Sometimes POs have received all of the money, but had an extension to spend it
- In these cases the activity is in progress, not further payments



Proposal: rename the status for accuracy

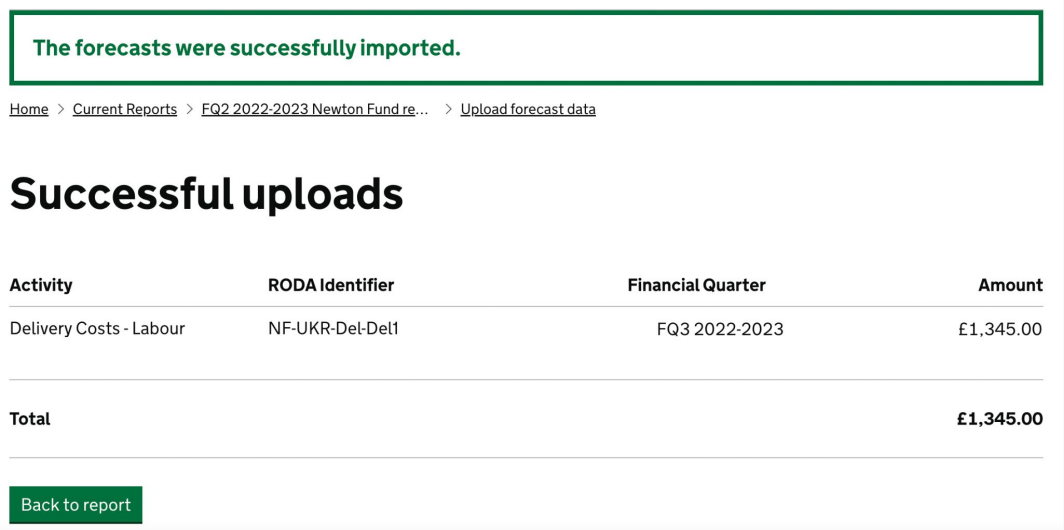
‘Spend in progress’ → ‘In progress’

Other improvements

Department for
Business, Energy
& Industrial Strategy

Forecast uploads

After uploading forecasts, the success page displays the uploaded data



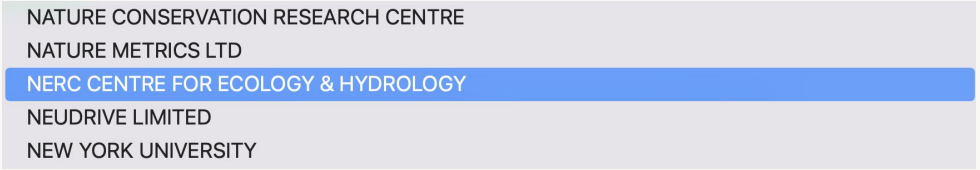
Department for Business, Energy & Industrial Strategy

Implementing organisations

Deactivated organisations cannot be added as implementing organisations

Example deactivated organisation: “NERC CENTRE FOR ECOLOGY & HYDROLOGY”

Before



After

Department for Business, Energy & Industrial Strategy

Comments in reports

Comments in CSV reports are easier to work with

The “|” character is easier to split into individual columns than “---” with line breaks

Before

Forecast FQ1 2022-2023	Comments in report	Link to activity
0	[redacted] ---- [redacted]	https://staging.report-official-deve

After

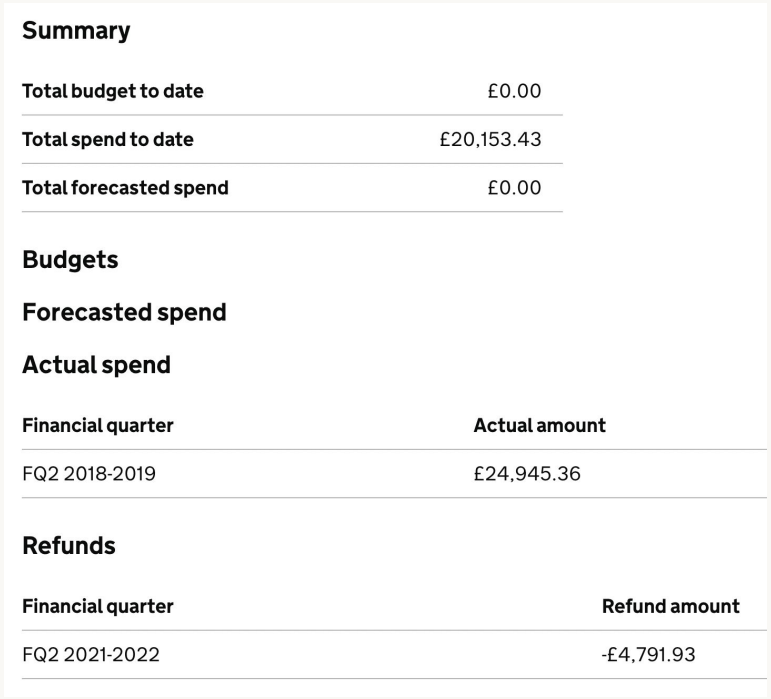
st FQ1 2022-2023	Comments in report	Link to activity
0	[redacted] | [redacted]	https://staging.re

Department for Business, Energy & Industrial Strategy

Total spend to date

Refunds and adjustments are reflected in total spend to date figure

This helps monitor spend across a level B programme, without needing to resort to manual calculation via CSV download



Summary

Total budget to date	£0.00
Total spend to date	£20,153.43
Total forecasted spend	£0.00

Budgets

Forecasted spend

Actual spend

Financial quarter	Actual amount
FQ2 2018-2019	£24,945.36

Refunds

Financial quarter	Refund amount
FQ2 2021-2022	-£4,791.93

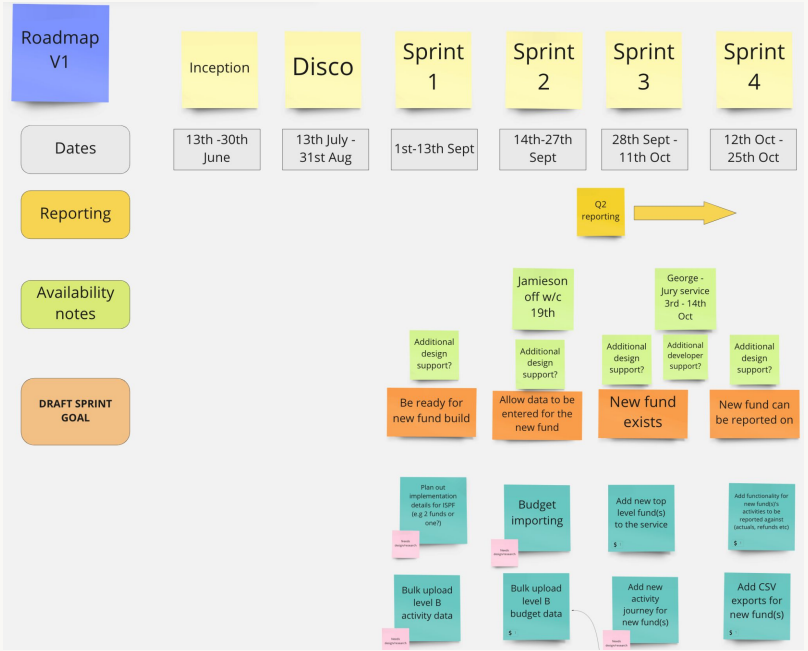
Department for Business, Energy & Industrial Strategy

New priorities and roadmap

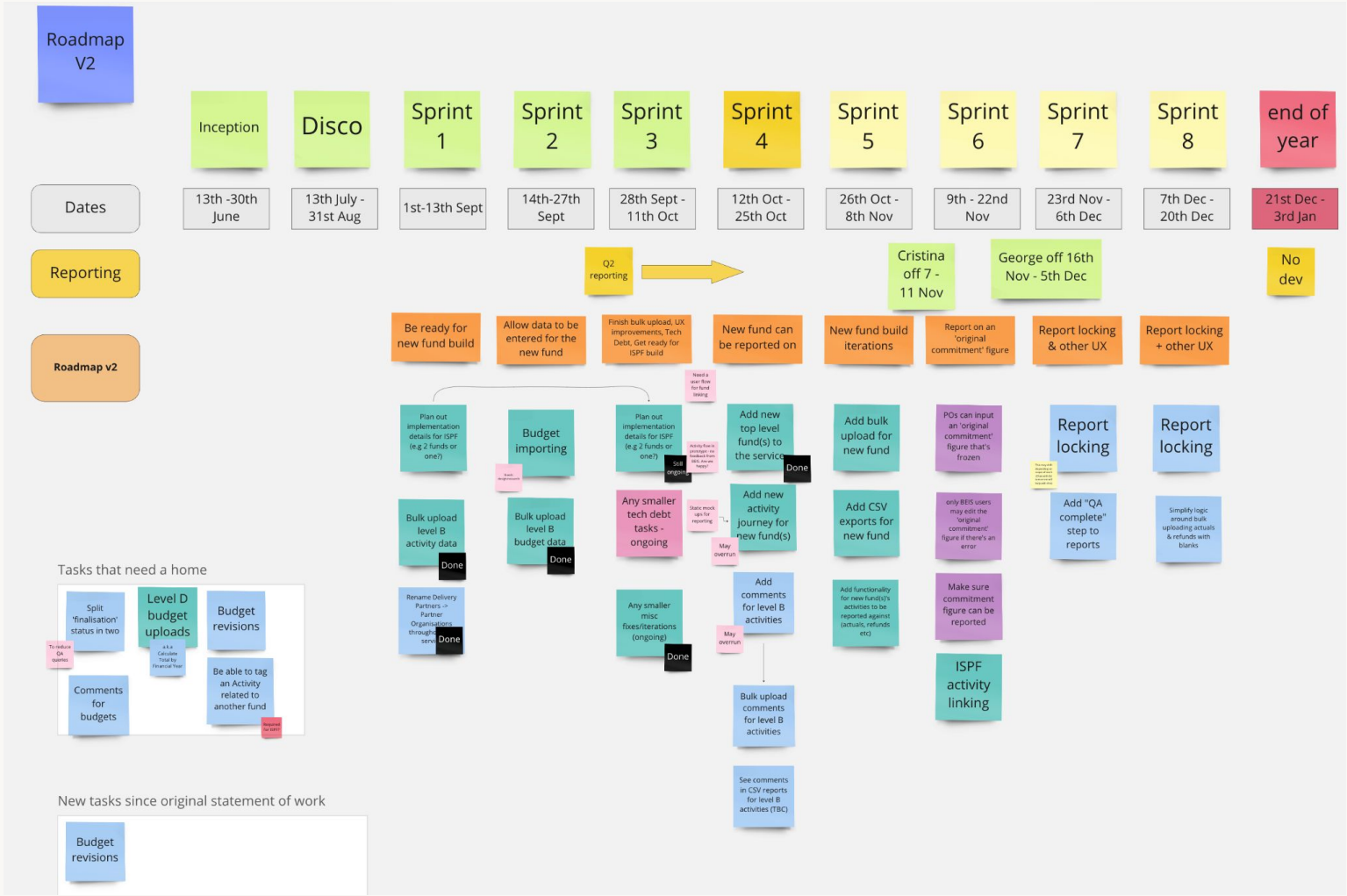
Department for Business, Energy & Industrial Strategy

We've reprioritised our roadmap

- We'd originally planned to start implementing ISPF a couple of sprints ago to get a head start before the reporting deadline
- We pushed this back to focus on the aforementioned usability wins while some of the finer details of ISPF were being ironed out
- We'll be focusing on fleshing out the ISPF build over the coming few weeks

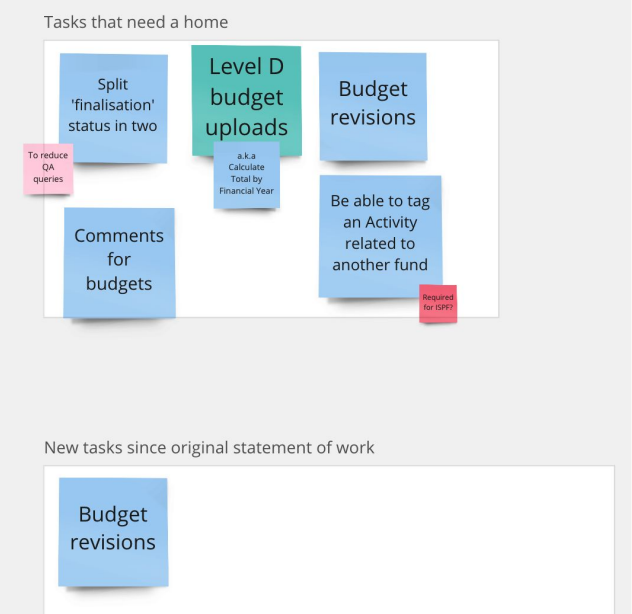


Department for Business, Energy & Industrial Strategy


Roadmap V2
Inception
Disco
Sprint 1
Sprint 2
Sprint 3
Sprint 4
Sprint 5
Sprint 6
Sprint 7
Sprint 8
end of year
Dates
13th -30th June
13th July - 31st Aug
1st-13th Sept
14th-27th Sept
28th Sept - 11th Oct
12th Oct - 25th Oct
26th Oct - 8th Nov
9th - 22nd Nov
23rd Nov - 6th Dec
7th Dec - 20th Dec
21st Dec - 3rd Jan
Reporting
Q2 reporting
Cristina off 7 - 11 Nov
George off 16th Nov - 5th Dec
No dev
Roadmap v2
Be ready for new fund build
Allow data to be entered for the new fund
Finish bulk upload, UX improvements, Tech Debt, Get ready for ISPF build
New fund can be reported on
New fund build iterations
Report on an 'original commitment' figure
Report locking & other UX
Report locking + other UX
Plan out implementation details for ISPF (e.g 2 funds or one?)
Budget importing
Plan out implementation details for ISPF (e.g 2 funds or one?)
Still ongoing
Add new top level fund(s) to the service
Done
Add bulk upload for new fund
POs can input an 'original commitment' figure that's frozen
Report locking
Report locking
Bulk upload level B activity data
Done
Bulk upload level B budget data
Done
Any smaller tech debt tasks - ongoing
Add new activity journey for new fund(s)
May overrun
Add CSV exports for new fund
only BEIS users may edit the 'original commitment' figure if there's an error
Add "QA complete" step to reports
Simplify logic around bulk uploading actuals & refunds with blanks
Rename Delivery Partners -> Partner Organisations throughout service
Done
Any smaller misc fixes/iterations (ongoing)
Done
Add comments for level B activities
May overrun
Add functionality for new fund(s)'s activities to be reported against (actuals, refunds etc)
Make sure commitment figure can be reported
ISPF activity linking
Bulk upload comments for level B activities
See comments in CSV reports for level B activities (TBC)
Tasks that need a home
Split 'finalisation' status in two
Level D budget uploads
Budget revisions
Comments for budgets
Be able to tag an Activity related to another fund
New tasks since original statement of work
Budget revisions

We've gathered requirements for other features

- Budgets - new requirements have emerged since we started development:
  - **Revisions**
  - **Bulk importing Level D budgets**
- These add some complexity, so we'll be scheduling these in for after the initial MVP for the new fund



Department for Business, Energy & Industrial Strategy

What's next?

Department for
Business, Energy
& Industrial Strategy

What are we doing next?

- Two main focuses for build work:
  - Fleshing out the new fund
  - Reporting a frozen ‘original commitment’ figure
- Learning more about how Level D budget figures might be usefully displayed
- Learning more about how data is collected for annual fund D-MEL metrics
- Designing how we’ll tag activities

Thank you!

We have some time for questions

Department for
Business, Energy
& Industrial Strategy