

We will start soon

**40 min for show and tell
5 min for questions**

We're recording!



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



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

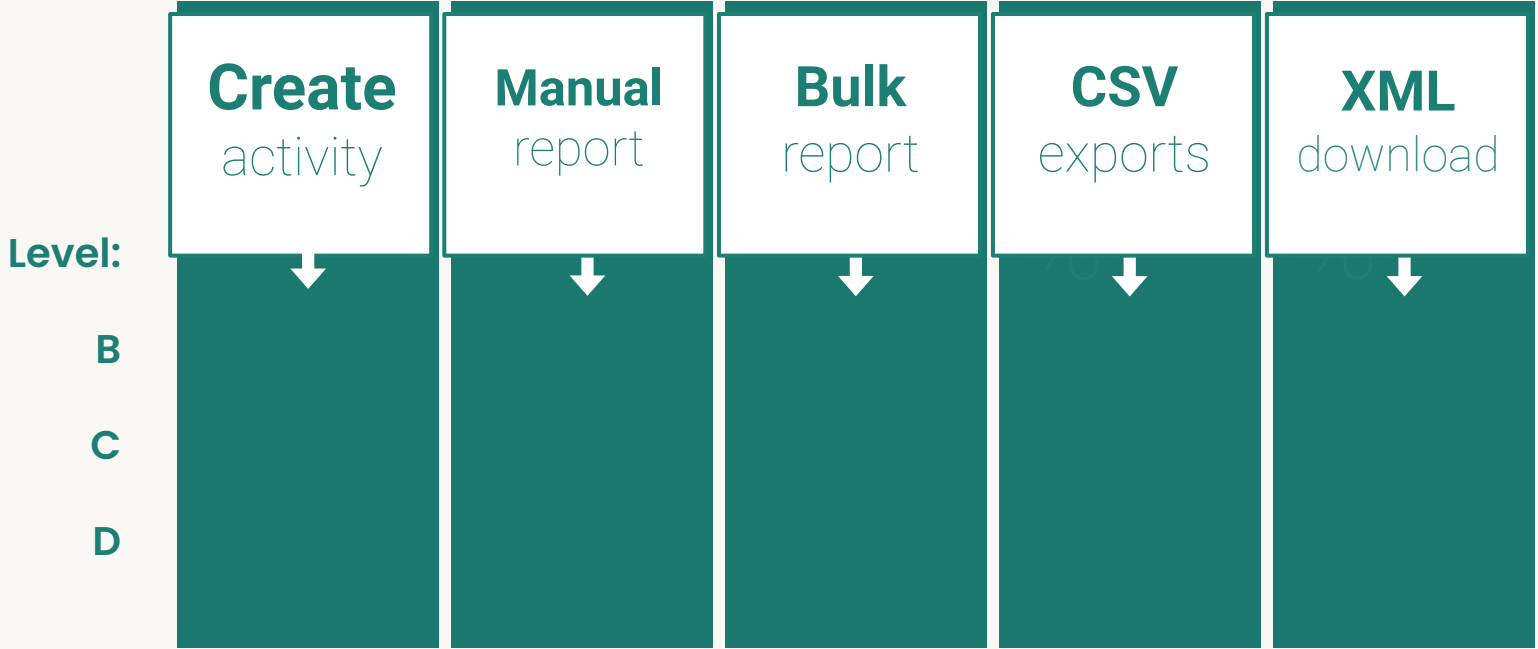


New fund



Department for
Business, Energy
& Industrial Strategy

Features to support the new fund



ODA + Non-ODA activities to be supported

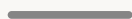


How we'll do it

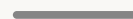
1



2



3



4

Clone a new Level A

Add a level A ISPF activity through the database

Customise screens

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

Bulk upload

Put the new fields into the bulk upload

Downloads

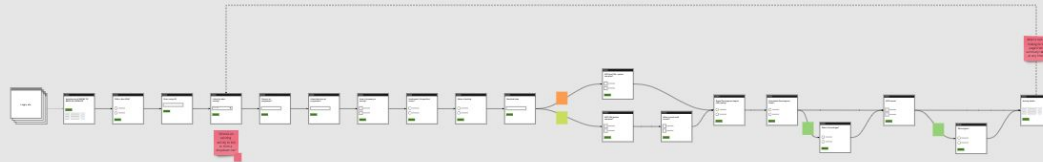
Include new fields in CSV exports



Linking activities

Design Collaboration 13/10

Linking ODA and non-ODA activities in ISPF



Fundamental questions

- What are the key activities?
- What are the key outputs?
- What are the key inputs?
- What are the key risks?
- What are the key dependencies?
- What are the key constraints?
- What are the key stakeholders?
- What are the key roles?
- What are the key responsibilities?
- What are the key deliverables?
- What are the key milestones?
- What are the key metrics?
- What are the key indicators?
- What are the key KPIs?
- What are the key performance indicators?
- What are the key success factors?
- What are the key challenges?
- What are the key opportunities?
- What are the key threats?
- What are the key risks?
- What are the key uncertainties?
- What are the key assumptions?
- What are the key hypotheses?
- What are the key theories?
- What are the key models?
- What are the key frameworks?
- What are the key methodologies?
- What are the key tools?
- What are the key technologies?
- What are the key platforms?
- What are the key systems?
- What are the key components?
- What are the key modules?
- What are the key interfaces?
- What are the key protocols?
- What are the key standards?
- What are the key regulations?
- What are the key policies?
- What are the key procedures?
- What are the key processes?
- What are the key workflows?
- What are the key pipelines?
- What are the key chains?
- What are the key networks?
- What are the key ecosystems?
- What are the key communities?
- What are the key cultures?
- What are the key values?
- What are the key beliefs?
- What are the key attitudes?
- What are the key behaviors?
- What are the key actions?
- What are the key decisions?
- What are the key choices?
- What are the key options?
- What are the key alternatives?
- What are the key possibilities?
- What are the key potentials?
- What are the key prospects?
- What are the key hopes?
- What are the key dreams?
- What are the key aspirations?
- What are the key ambitions?
- What are the key goals?
- What are the key objectives?
- What are the key purposes?
- What are the key missions?
- What are the key visions?
- What are the key futures?
- What are the key destinies?
- What are the key fates?
- What are the key fortunes?
- What are the key destinies?
- What are the key fates?
- What are the key fortunes?

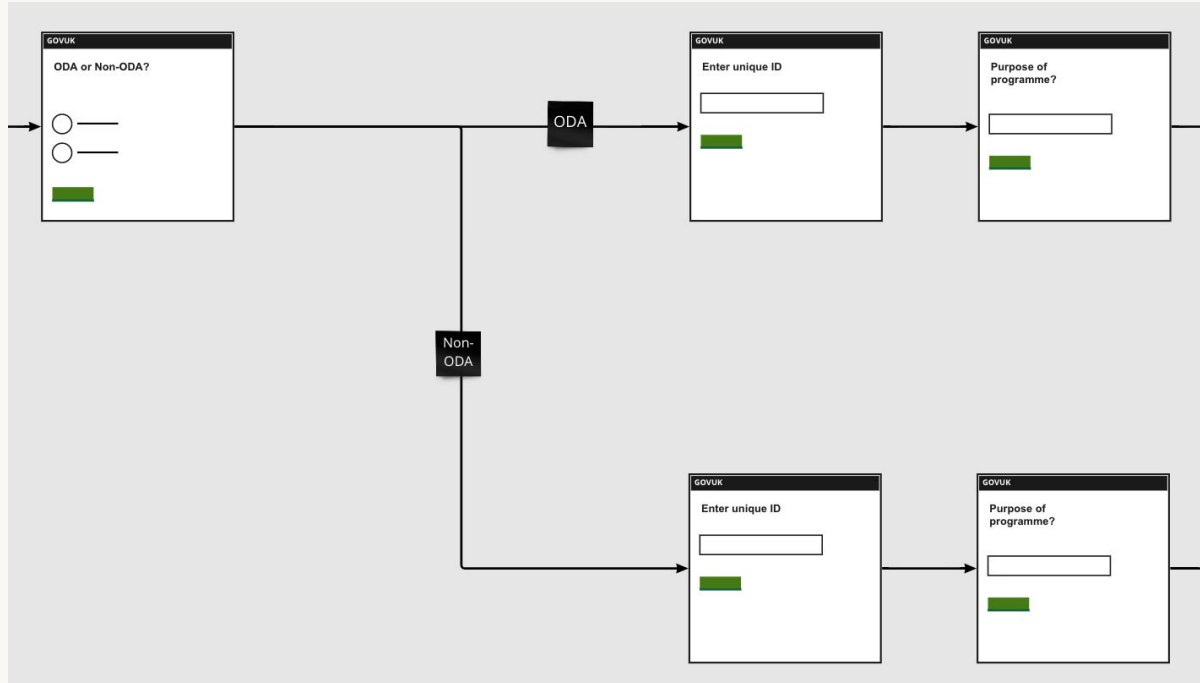
Implementation questions

- How to do it?
- Who to do it?
- When to do it?
- Where to do it?
- How much to do it?
- How often to do it?
- How long to do it?
- How fast to do it?
- How slow to do it?
- How easy to do it?
- How hard to do it?
- How simple to do it?
- How complex to do it?
- How clear to do it?
- How unclear to do it?
- How certain to do it?
- How uncertain to do it?
- How confident to do it?
- How unconfident to do it?
- How optimistic to do it?
- How pessimistic to do it?
- How positive to do it?
- How negative to do it?
- How constructive to do it?
- How destructive to do it?
- How creative to do it?
- How uncreative to do it?
- How innovative to do it?
- How uninnovative to do it?
- How original to do it?
- How unoriginal to do it?
- How unique to do it?
- How non-unique to do it?
- How special to do it?
- How non-special to do it?
- How important to do it?
- How non-important to do it?
- How valuable to do it?
- How non-valuable to do it?
- How useful to do it?
- How non-useful to do it?
- How effective to do it?
- How non-effective to do it?
- How efficient to do it?
- How non-efficient to do it?
- How successful to do it?
- How non-successful to do it?
- How profitable to do it?
- How non-profitable to do it?
- How beneficial to do it?
- How non-beneficial to do it?
- How helpful to do it?
- How non-helpful to do it?
- How supportive to do it?
- How non-supportive to do it?
- How encouraging to do it?
- How non-encouraging to do it?
- How motivating to do it?
- How non-motivating to do it?
- How inspiring to do it?
- How non-inspiring to do it?
- How empowering to do it?
- How non-empowering to do it?
- How enabling to do it?
- How non-enabling to do it?
- How facilitating to do it?
- How non-facilitating to do it?
- How assisting to do it?
- How non-assisting to do it?
- How aiding to do it?
- How non-aiding to do it?
- How helping to do it?
- How non-helping to do it?
- How supporting to do it?
- How non-supporting to do it?
- How backing to do it?
- How non-backing to do it?
- How endorsing to do it?
- How non-endorsing to do it?
- How approving to do it?
- How non-approving to do it?
- How accepting to do it?
- How non-accepting to do it?
- How acknowledging to do it?
- How non-acknowledging to do it?
- How recognizing to do it?
- How non-recognizing to do it?
- How appreciating to do it?
- How non-appreciating to do it?
- How valuing to do it?
- How non-valuing to do it?
- How respecting to do it?
- How non-respecting to do it?
- How honoring to do it?
- How non-honoring to do it?
- How respecting to do it?
- How non-respecting to do it?
- How honoring to do it?
- How non-honoring to do it?

Examples of UK patterns for linking a thing with other things

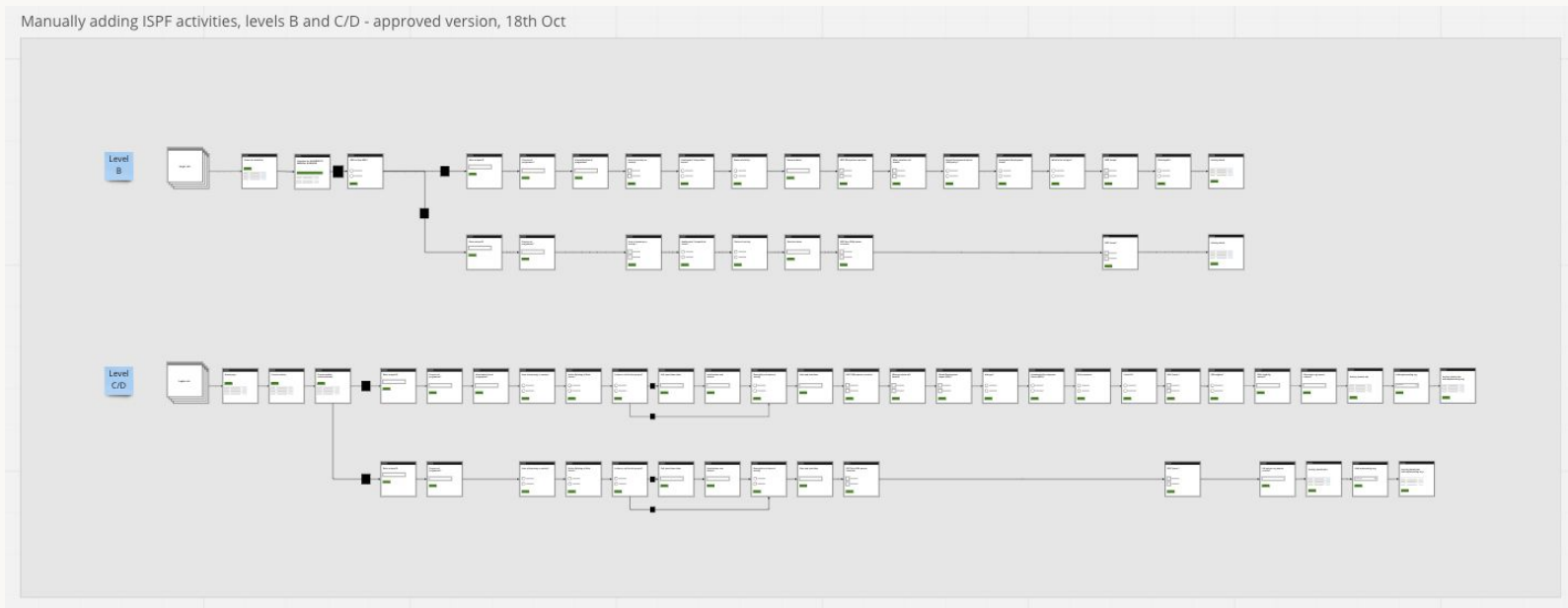


A word on prototyping



Quicker decision making

Manually adding ISPF activities, levels B and C/D - approved version, 18th Oct



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

Activities

Search for activities

Enter your search query

You can search by RODA, Partner Organisation, BEIS, or IATI identifier, or by the activity's title

Search

Activities for UK Space Agency

Add new activities

Add new activity to Global Challenges Research Fund (GCRF)

Add new activity to International Science Partnerships Fund

Add new activity to Newton Fund

Add new activity to Other ODA



Importing Level B Budgets



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.

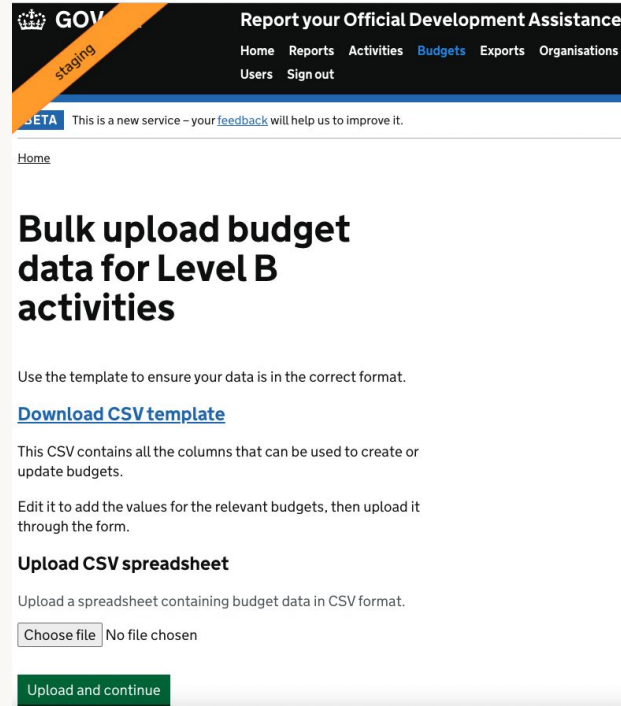
We had a requirements session and design collab with BEIS in order to understand what features are needed and what it would look like.

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



Budget import – Route in

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



The screenshot shows a web interface for reporting Official Development Assistance. The header includes the GOV.UK logo, a 'staging' banner, and navigation links for Home, Reports, Activities, Budgets, Exports, Organisations, Users, and Sign out. A beta notice states: 'BETA This is a new service – your [feedback](#) will help us to improve it.'

The main heading is 'Bulk upload budget data for Level B activities'. Below this, instructions state: 'Use the template to ensure your data is in the correct format.' A blue link 'Download CSV template' is provided. Further text explains: 'This CSV contains all the columns that can be used to create or update budgets. Edit it to add the values for the relevant budgets, then upload it through the form.'

The section 'Upload CSV spreadsheet' includes the instruction: 'Upload a spreadsheet containing budget data in CSV format.' Below this is a file selection button labeled 'Choose file' with the text 'No file chosen' next to it. At the bottom of the section is a green button labeled 'Upload and continue'.



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”



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.

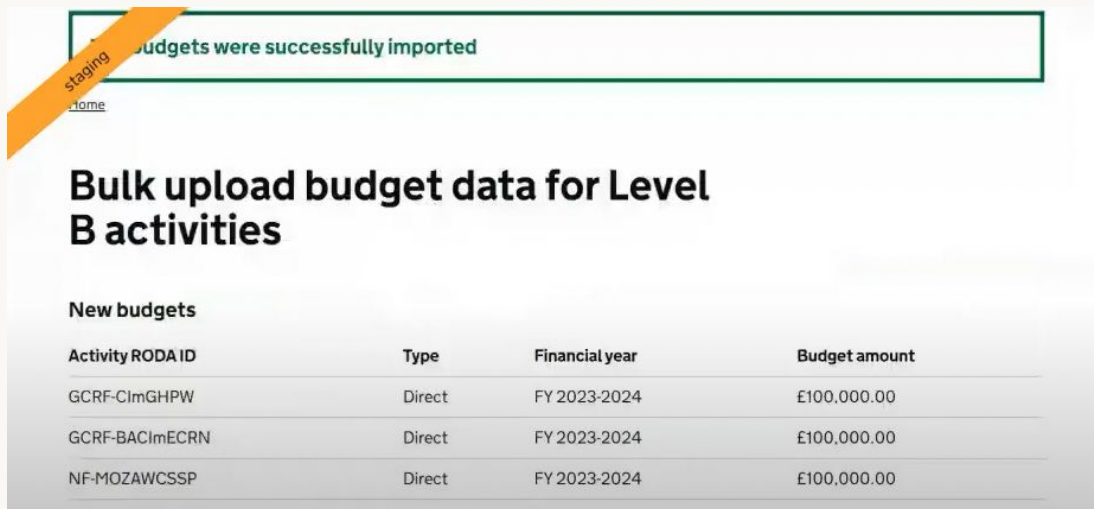
“As long as there is guidance on zendesk, then entering the data should be fine”



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.



The screenshot shows a web interface with a green confirmation banner at the top that reads "Budgets were successfully imported". Below the banner is a navigation menu with a "Home" link. The main heading is "Bulk upload budget data for Level B activities". Underneath, there is a section titled "New budgets" which contains a table with four columns: "Activity RODA ID", "Type", "Financial year", and "Budget amount". The table lists three budget entries.

Activity RODA ID	Type	Financial year	Budget amount
GCRF-CImGHPW	Direct	FY 2023-2024	£100,000.00
GCRF-BACImECRN	Direct	FY 2023-2024	£100,000.00
NF-MOZAWCSSP	Direct	FY 2023-2024	£100,000.00

“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”



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

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

*“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”

AFTER

Level_B_budgets_upload (1)

Activity RODA ID	Financial year	Budget amount	Type	Providing organisation	Providing organisation type	IATI reference
------------------	----------------	---------------	------	------------------------	-----------------------------	----------------

“I don’t think it’s necessary for **Partner Org name**, if it was optional I would leave it out”

“It makes more sense if ‘Type’ were followed with providing org, providing org type and IATI reference. Populated if type is 1 - OODA”

What next?

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



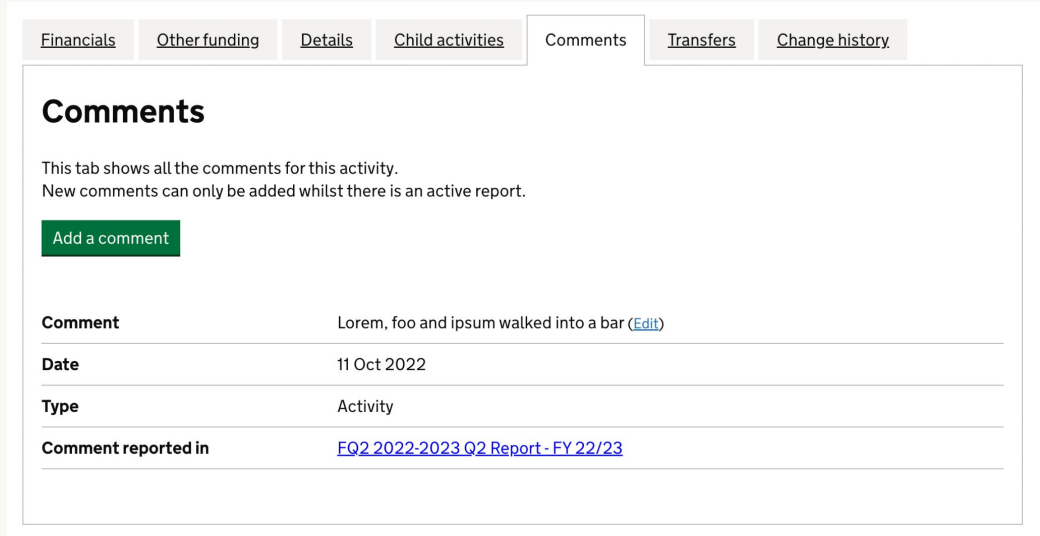
Commenting on Level B Activities



Levels C and D commenting

Commenting on activities via the UI was previously only available:

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



Financials Other funding Details Child activities **Comments** Transfers Change history

Comments

This tab shows all the comments for this activity.
New comments can only be added whilst there is an active report.

[Add a comment](#)

Comment	Lorem, foo and ipsum walked into a bar (Edit)
Date	11 Oct 2022
Type	Activity
Comment reported in	EQ2 2022-2023 Q2 Report - FY 22/23

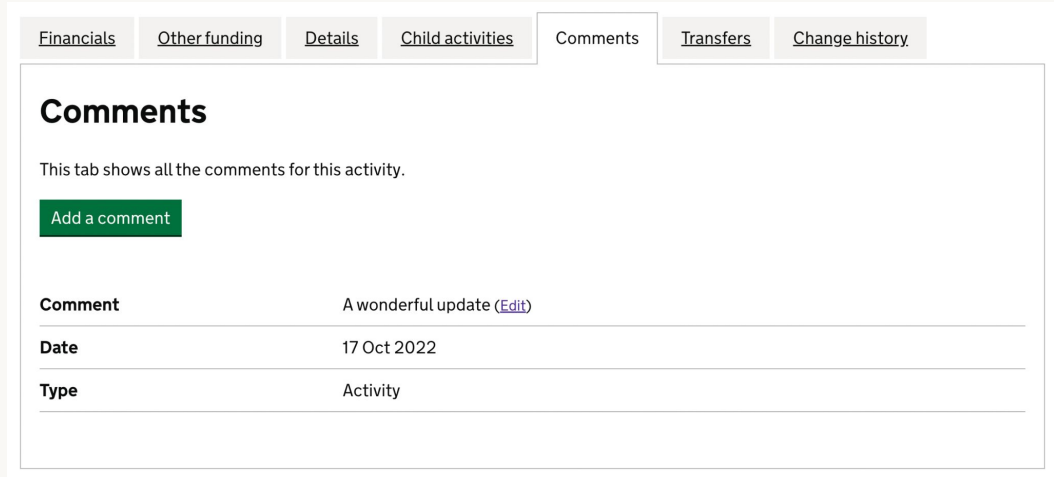


Level B commenting

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

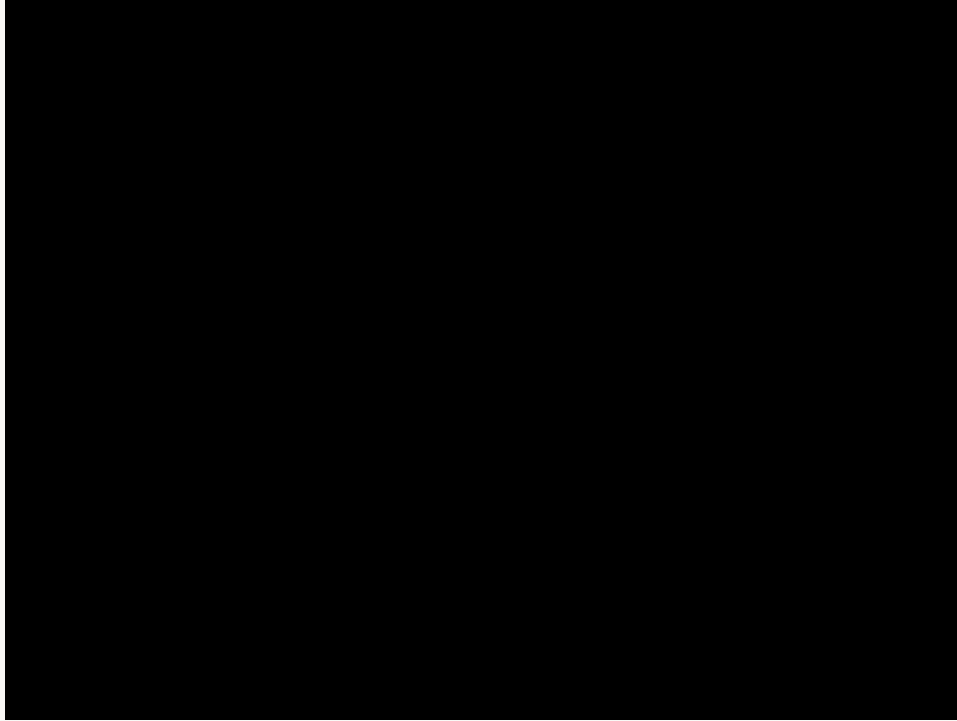


The screenshot shows a web interface with a navigation bar at the top containing tabs: Financials, Other funding, Details, Child activities, Comments, Transfers, and Change history. The 'Comments' tab is selected. Below the navigation bar, the heading 'Comments' is displayed. A sub-heading states 'This tab shows all the comments for this activity.' Below this is a green button labeled 'Add a comment'. A table lists a single comment:

Comment	A wonderful update (Edit)
Date	17 Oct 2022
Type	Activity



Demo



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



Building the new fund without disrupting the live service



The ISPF can be hidden

dxw.

Create a new report

before

Financial quarter

- Q1 Q2 Q3
 Q4

Financial year

Fund (level A)

- Global Challenges Research Fund (GCRF)
 Newton Fund
 Other ODA
 International Science Partnerships Fund

Create a new report

after

Financial quarter

- Q1 Q2 Q3
 Q4

Financial year

Fund (level A)

- Global Challenges Research Fund (GCRF)
 Newton Fund
 Other ODA

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

Rollout

[← back to overview](#)

`ispf_fund_in_stealth_mode`

Description

Groups (multi-select)

(none)
all
beis_users
partner_organisation_users

Percentage

0.0

Users

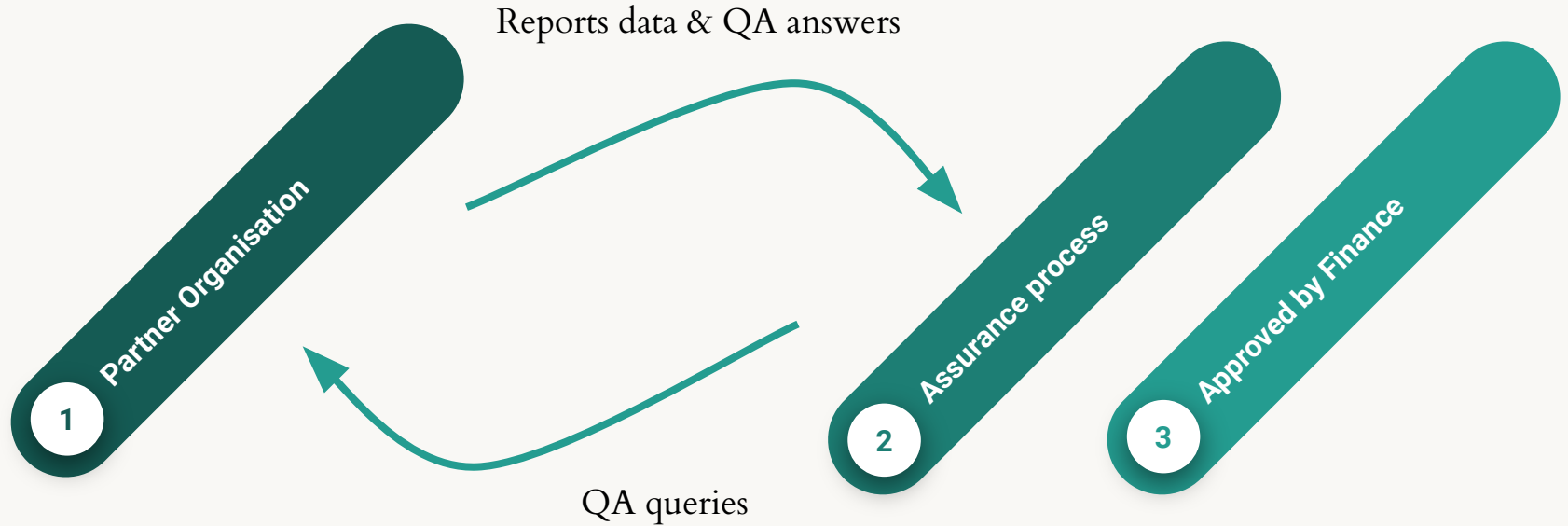


Preventing QA queries



Department for
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Report Quality Assuring (QA) queries



76% of QA queries in Q1:

“The forecasts seem incongruent with the status”

	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: <i>(check box when review complete)</i>			
12		BEIS ODA PMO Finance (Satinder Arora, Andy Perfit, Frederick Roofe)		
13		BEIS Assurance/Information Analyst (Joshua Roworth)		
14		BEIS Group Finance (Emma Rose, Mahfuzul Haque)		
15	Deadline for DP response			
16	Change type colour ref (see 'change type ref')	Programme or finance?	Notify/action required	BEIS Comment
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,
22		Finance	Action - review status	Status is "Finalisation



Over half of these:

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

QA queries - Q1 batch 3 .XLSX ☆ 📄 ☁️ | File Edit View Insert Format Data Tools Help Last...

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	A	B	C	D
1		Highlight		
2	Blank cells			
3	Incorrect entry			
4	Error corrected by ODA RMT			
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20		Finance	Action - review status	Status is "Finalisation no future forecasts,
21		Finance	Action - review status	Status is "Finalisation no future forecasts,
22		Finance	Action - review status	Status is "Finalisation



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

Exploring forecasting QA queries

Agenda - 19th October 10.30am

Time	Topic
1 5min	Welcome & consent to record the session
2 5m	Recap the QA analysis findings
3 5m	Share views on root cause
4 10m	Generate possible solutions and evaluate them
5 5m	What next and close

Purpose

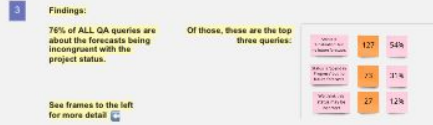
- To share the findings about QA queries that might be avoided
- To explore the problem
- To evaluate potential solutions

Participants

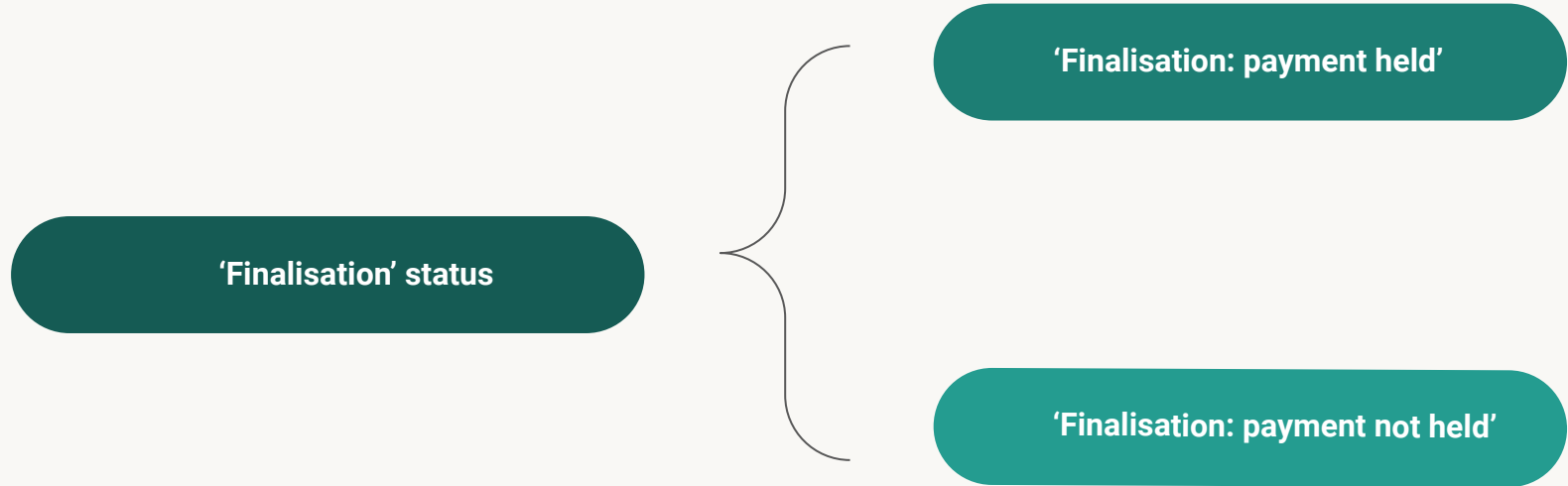
HERE: Alice, Ebela, Jameson, Gaz, George, Sam O, Dan, Vicky, Maiara, Yrnda

OPTIONAL: Cristina, Meena, Paul, Sam S, Josh

- Working assumptions:**
- Every QA query involves significant handling cost and delay for BEIS and POs.
 - Preventing queries is the most efficient improvement we can make
 - We can do that many ways
 - To know where to start, we analysed the causes.

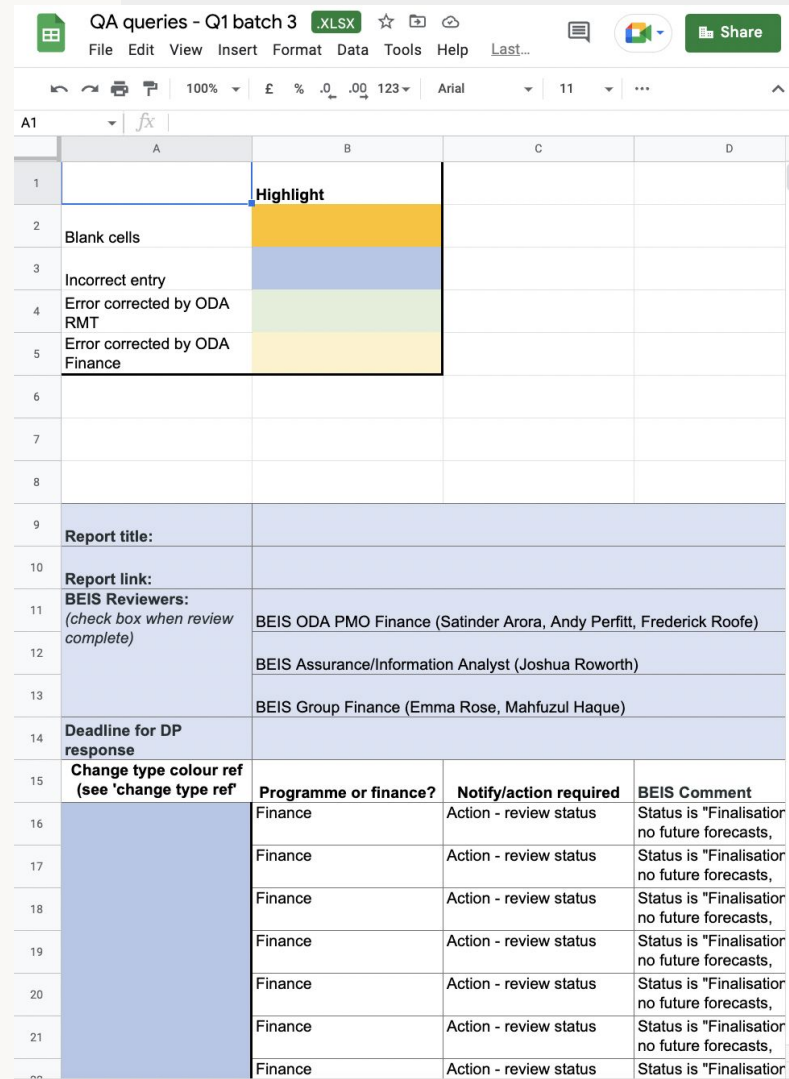


Proposal: split the status in two



A third of the status queries:

“The status is ‘Spend in progress’ but there are no future forecasts”



QA queries - Q1 batch 3 .XLSX

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	A	B	C	D
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2	Blank cells			
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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,
22		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

Current

Historic

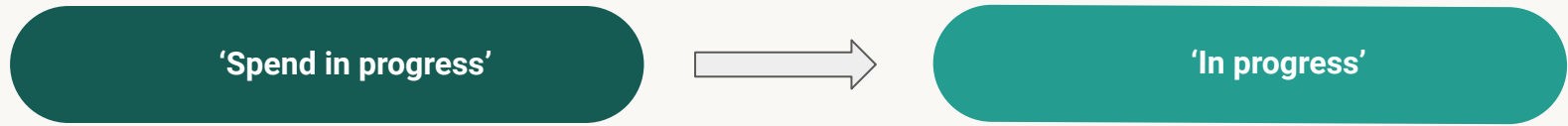
Current activities

Global Challenges Research Fund (GCRF)

Name	RODA Identifier	Status	
Activity 4	GCRF-AMS-2JTG4X	Spend in progress	View
Untitled (f2f4a2fb-8d0e-4faf-9f6c-347a52b5a590)	GCRF-AMS-9ML2X63		View
Activity 2	GCRF-AMS-DUR9JGS	Spend in progress	View
asd	GCRF-AMS-PFUGKNL	Delivery	View
Activity 3	GCRF-AMS-SAWX4P2	Spend in progress	View
Activity 1	GCRF-AMS-TGMGAG2	Spend in progress	View
Consectetur Nibh Parturient	GCRF-AMS-XN4NLMG	Planned	View



Proposal: rename the status for accuracy



Other improvements



Forecast uploads

After uploading forecasts, the success page displays the uploaded data

The forecasts were successfully imported.

[Home](#) > [Current Reports](#) > [FQ2 2022-2023 Newton Fund re...](#) > [Upload forecast data](#)

Successful uploads

Activity	RODA Identifier	Financial Quarter	Amount
Delivery Costs - Labour	NF-UKR-Del-Del1	FQ3 2022-2023	£1,345.00
Total			£1,345.00

[Back to report](#)



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Implementing organisations

Deactivated organisations cannot be added as implementing organisations

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

Before

NATURE CONSERVATION RESEARCH CENTRE
NATURE METRICS LTD
NERC CENTRE FOR ECOLOGY & HYDROLOGY
NEUDRIVE LIMITED
NEW YORK UNIVERSITY

After

NATURE METRICS LTD
NEUDRIVE LIMITED
NEW YORK UNIVERSITY
NEWCASTLE UNIVERSITY



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	We made an error with our spreadsheet ---- There were no travel costs for this quarter (there have been no travel during the pandemic), but we have spent relatively more on discretionary costs.	https://staging.report-official-deve

After

Forecast FQ1 2022-2023	Comments in report	Link to activity
0	We made an error with our spreadsheet There were no travel costs for this quarter (there have been no travel during the pandemic), but we have spent relatively more on discretionary costs.	https://staging.re



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



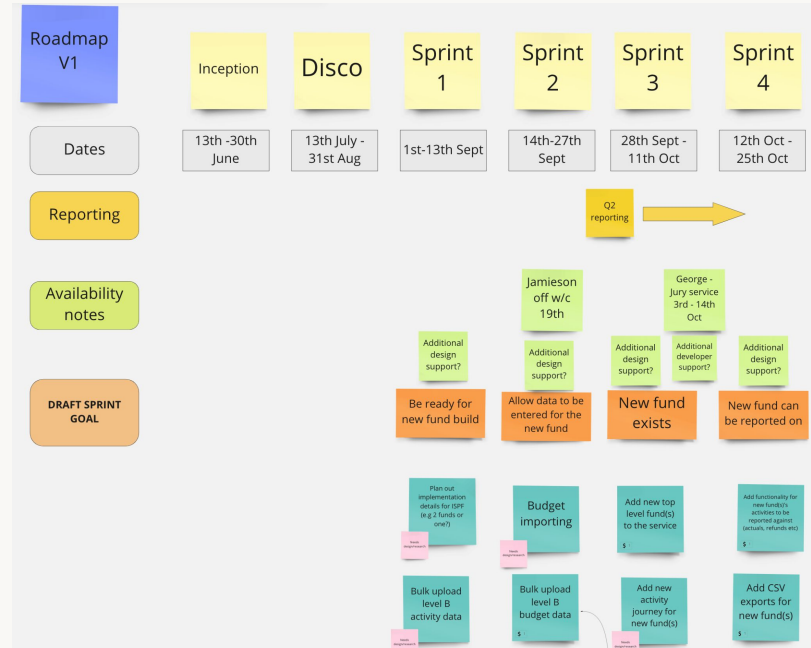
New priorities and roadmap



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



Roadmap v2

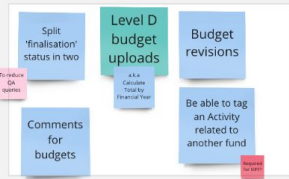


Reporting

Roadmap v2



Tasks that need a home

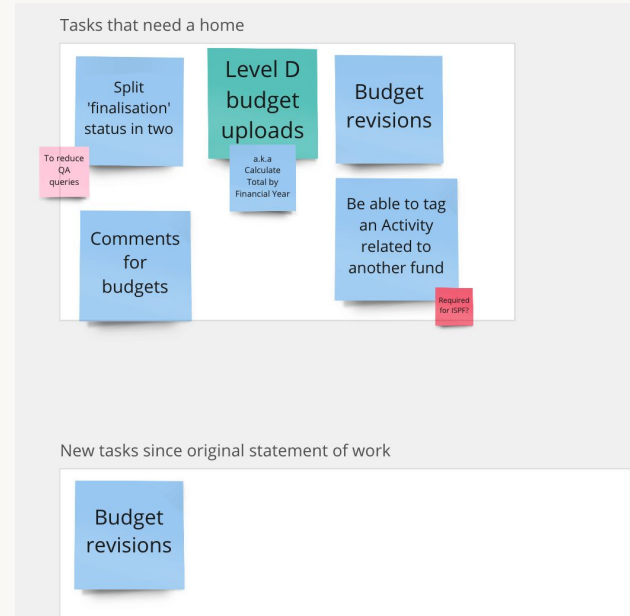


New tasks since original statement of work



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



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**

