OPEN DATA TUTORIAL

Opening and promoting use of budget data

How can we open budget data?
What elements should we consider?

Since data publication depends on the characteristics of the information, the technical capacities available and the time frame for its execution, there is no single formula. Nonetheless, having a series of useful steps to consider can be very helpful. Those steps will be briefly described in this document and each will be explored in detail in the following videos and documents.

1. Listen to the demand:

It is about identifying potential users, that is, people and organizations interested in budget data, and understand their information needs.

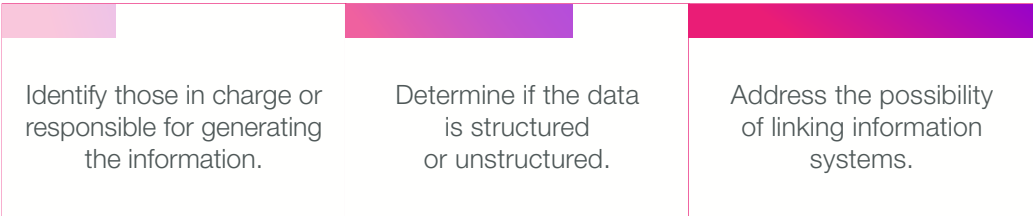**Some actions that will help identify these users and understand their interests are:**

Analyze information requests.	Identify people and organizations interested and listen to them directly.	Review use statistics of public information.	Participate in events led by civil society organizations.
Organize events encouraging civil society participation.	Examine social networks statistics and trends.	Consider international trends.	

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2. Identify the source and format:

Most of the times the information intended to be opened was not created thinking about its direct publication, but it is the product of the daily management of government operation, so working in its openness will involve analysis, debugging and creation of new processes to ensure sustainability.

Once the decision to initiate a process of opening information has been made, it is vital to locate the source and the format in which the budget data can be found. The less structured they are, the greater the work ahead to open it. For example, it is not the same to work with data that is only in printed format, than with structured data in a digital format.

Therefore, it is important to consider, at least, the following factors:

Identify those in charge or responsible for generating the information.	Determine if the data is structured or unstructured.	Address the possibility of linking information systems.

3. Debugging and cleaning:

During the opening process it is important to review the quality of the information that will be published: not all data is ready to be published from the start.

When the data is dirty, its review and processing becomes a tedious and complicated task. **Among some of the most common errors when building and harmonizing data sets are**:

Templates with predefined formats.	Misspellings and homonyms that create (or disappear) geographical spaces.	New categories, depending on who registered them.	Additional calculations in tabular formats that result in misleading sums.
Use of monetary or percentage formats in numerical fields.	Excess of columns and empty fields.	Line breaks inside the cells or double spaces.	Omission of a data dictionary.

4. Verify national and/or international standards:

Data openness must aim to be in accordance with national or international standards. This will allow data to be comparable and compatible in multiple contexts.

In this section you will find more information about:

- National standards.
- International standards.
- Examples in the adoption of standards.
- Steps to standardize information.

5. Think about sustainability:

Opening data implies a constant process that considers the accomplishment of different tasks and activities. Therefore, **the teams responsible for the openness must take into account aspects such as**:

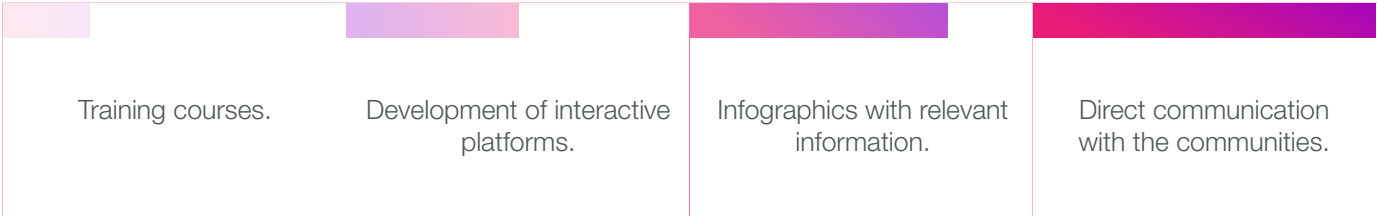| Time frames for publication and updating.	Changes or integrations in information systems (software and hardware).	Technological infrastructure.	Time and/or human resources costs.

6) Use licenses that consider users and protect them while using your data:

The data generating entities must stipulate the licenses of use that will address the ethical and legal aspect of the information. In this section, we will review examples of terms of use for this purpose.

7) Promote the use of information:

To guarantee its dissemination and access through communication strategies and actions that facilitate the interaction, linkage and participation of society in the use of the published data.

To achieve this, strategies for analysis and dissemination of information must be developed to foster sharing success stories as well as capacity building. Among some proposals to promote this are:

Training courses.	Development of interactive platforms.	Infographics with relevant information.	Direct communication with the communities.

In the subsequent documents the particularities of each stage will be further detailed as we delve our understanding of the openness process.