



PARS Reporter

PARS Reporter User Guide

1.0 Introduction

PARS Reporter is a custom software application designed to simplify the process of managing and encoding the Program, Activity, Partner and associated data that is required to comply with CIDA's PARS reporting specification.

PARS Reporter is an easy-to-use, yet powerful system that leads to accurate and error-free PARS up-load files.

The following features make PARS Reporter a valuable single collection point for your PARS reporting:

- a) Simple to understand user interface.
- b) Pre-loaded CIDA data for many Activity choice options. IE. Sector, Region, Country, Theme codes.
- c) Ability to set up a master list of Overseas Partners with appropriate contact information.
- d) Automated data error-checking prior to Export file creation.
- e) Data error location Go-to buttons to ease error correction.
- f) Data warnings located throughout the user interface to help users to capture accurate PARS compliant data.
- g) Flexible filename definition options.
- h) Ability to import legacy PARS data from CIDA.
- i) Ability to export multiple Activities in one PARS upload file.
- j) Upgradeable to client-server mode.
- k) Can be used in mixed Windows and/or Macintosh environments.
- l) Contribution and percentage allocation calculations are performed automatically.
- m) Enhanced Finance, Metrics and Milestone tracking capabilities.

Certain features available in the standard version of PARS Reporter are not available in PARS Reporter Lite. PARS Reporter Lite does not include the enhanced Finance, Metrics and Milestone screens, and certain Export functions are disabled. The ability to export the CIDA PARS file is enabled in PARS Reporter Lite. Buttons and screens that are disabled in PARS Reporter Lite will display an explanatory dialog when a user attempts to use them, or the function will not be visible. To upgrade from PARS Reporter Lite to the standard PARS Reporter version, contact Nufocus Inc.

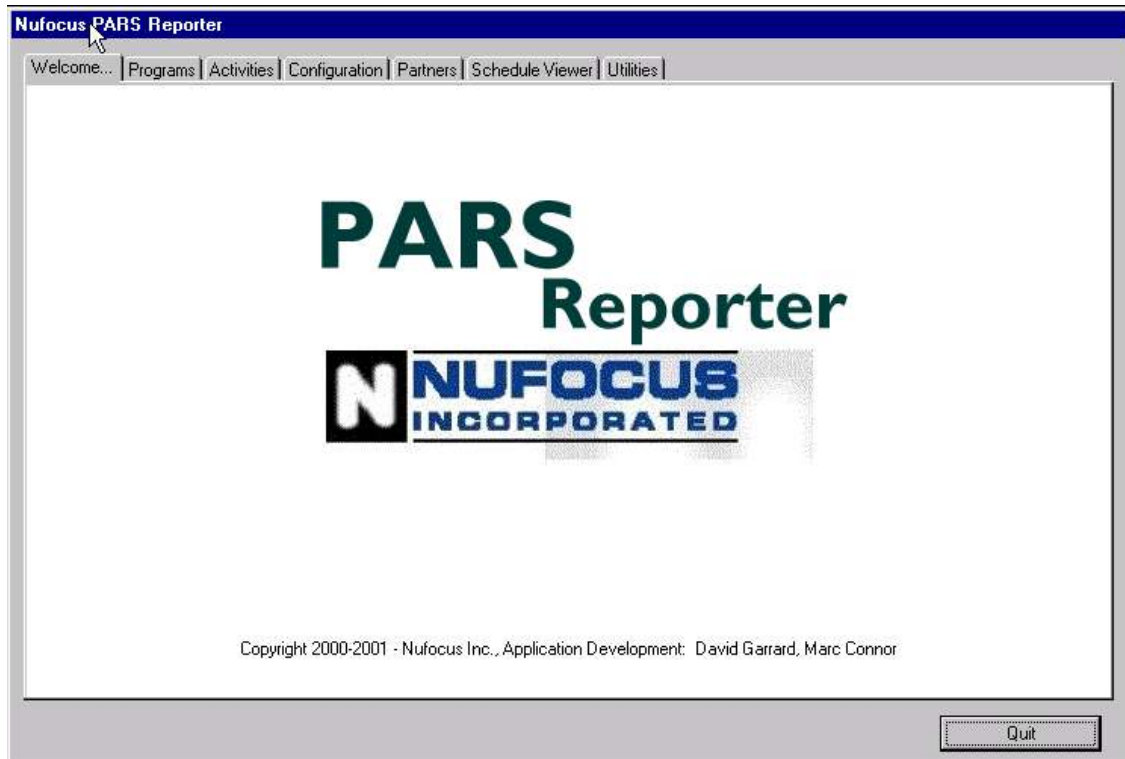
PARS Reporter RBM introduced new functions for Results Based Management (RBM) analysis and reporting to the standard version of PARS Reporter. These features are discussed in the separate RBM Guide that is supplied to all purchasers of the PARS Reporter RBM upgrade. Contact Nufocus Inc. for further information.

2.0 PARS Basics

The 2 fundamental units in PARS Reporter are Programs and Activities. PARS Reporter is designed to organize the relationship between a Program and its subordinate Activities, and allows the user to link Activities to the different Programs you operate. Also, PARS Reporter allows you to Extend Activities into subsequent years and manage the linkage of your Partners to your Activities. Best of all, PARS Reporter quickly prepares the PARS compliant load file that is required by CIDA on a regular basis.

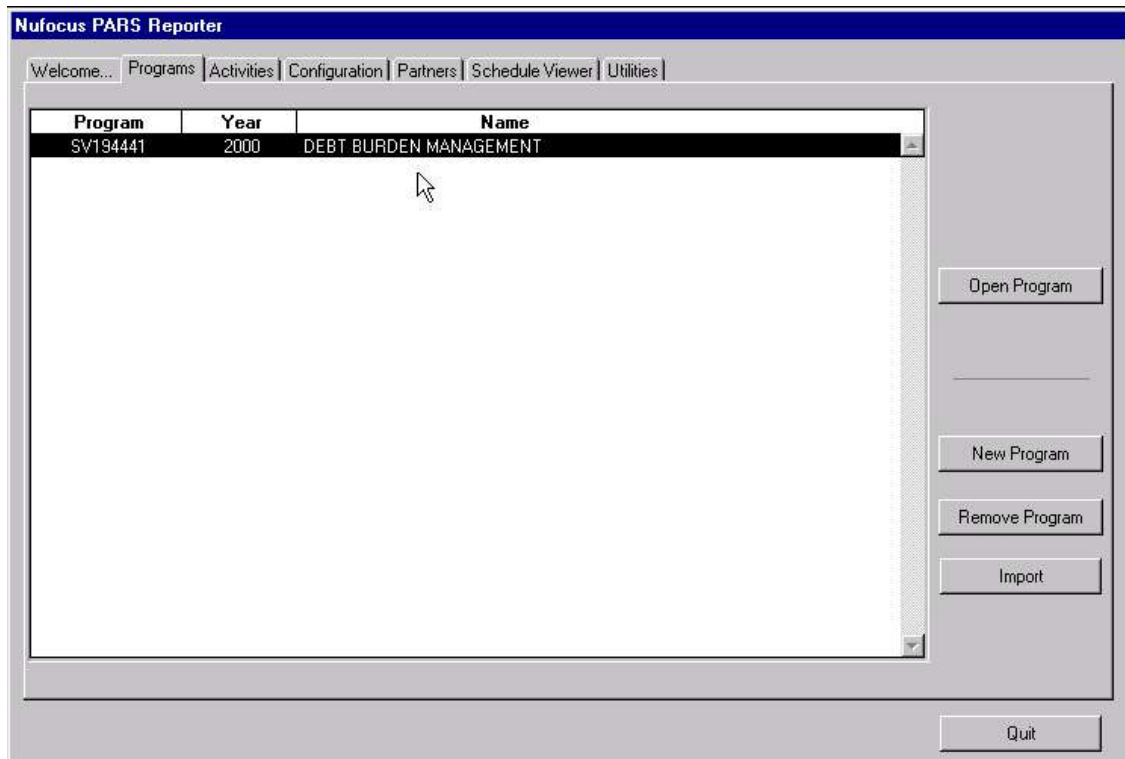
3.0 The Navigator

When you first start the PARS Reporter applications, you will see the Navigator Welcome screen:



The **Navigator Screen** contains the **Navigator Tab** control and the **Quit** button. The Tab control is used to navigate the six **Navigator Tab** pages: Welcome..., Programs, Configuration, Partners, Schedule Viewer and Utilities. These are described in further detail below. Click on the Tabs along the top to move from page to page. Clicking the **Quit** button will exit the application.

3.1 Programs Tab



The **Programs** page contains a list of all programs currently in the system. Clicking on a column header of the list area (for instance the word “Program”) will sort the list in ascending alphabetical order by that column. Select a Program and click on **Open Program** to see the **Program Information** screen, which will be described later. To delete a program, select it in the list, and click **Remove Program**. Note that if one or more activities are linked to the removed Program, deleting that Program will also delete the associated Activities. To create a new Program, click **New Program**, and the **New Program Screen** will open.

You may also **Import** an existing PARS record on this screen by clicking the **Import** button. You will be prompted for a file name. This file must be in the PARS file format specified by CIDA. Attempts to import other files could lead to data corruption. Once you have entered the file name or chosen the file from your hard drive, you will be notified when the import is complete. Always make a backup of the data file prior to importing CIDA PARS Files.

Since Program Numbers must be unique, you will be informed if the imported Program has the same number as a Program already in PARS Reporter, and you will be given the option of renaming it, or skipping it. The same applies to activities – if you attempt to import an Activity already in PARS Reporter, you will have the option of either changing the name, skipping, or linking the existing Activity to the new Program.

3.1.1 The New Program Screen

New Programs are added using the New Program screen. All Programs need a Program Number, a Name and a Start and End Date. All four fields must be entered before clicking on the Save button. Some red warning text may appear on this dialog with advisories concerning required data in certain fields.

New Program

Enter Program Information :

Program Number:

Program Name:

Start Date:

End Date:

3.2 The Activity List Screen

The Activity List screen displays all Activities in PARS Reporter. New Activities are added using the Add Activity button. To view an existing Activity, select an Activity on the list and click on the Open Activity button. Section 4 describes the Activity Information screen.

Nufocus PARS Reporter Lite

Welcome... | Programs | **Activities** | Configuration | Partners | Schedule Viewer | Utilities

Filter Project Activities:
 Program Number: ☐ Show Operational Activities Only

3 Activities

PA Num	Title	Program	Year	Last Edit
001	Canadian Intl Immunization Initiative	S-054307	1999-2003	07/26/2002
ALED	RENFORCEMENT DE BIBLIOTHEQUES A SEGOU	S-053860	2001-2003	02/26/2003
FIE-3400	Financial Education	SV194441	2001-2005	02/21/2002

Last PARS File Creation Date:

To extend an Activity, select an Activity from the list and click on the **Add Activity** button. You will be prompted to either Add a New Activity or Extend the selected Activity from the list. Extending simply clones the selected Activity completely and increments the Year on the new one. If you do not wish to create or extend an Activity, select **Cancel**.

By using the controls found in the “Filter Project Activities” block, the Activities listed on the screen can be filtered by either Program and/or Operational Status. Click on the Show All button to list all Activities in your PARS Reporter data file.

Click on the **Print Activities** button if you wish to print individual Activity information or a Activities Financial Contribution Listing. See section 4.10 for more details.

The **PARS Export** button enables you to generate a PARS File containing data from multiple Projects/Activities. To create a multiple Project/Activity PARS File simply click , shift-click and/or control-click on the Activities in the list until you have the desired selection for export. Note that you should Open each Activity and proceed to the Export page prior to creating a multiple Project/Activity PARS File. This is recommended so that you can individually test the readiness of each Project/Activity record’s data prior to attempting to create the PARS File.

Please refer to the **IMPORTANT NOTE** found in section 4.9 regarding sending files to CIDA.

3.3 Configuration Tab

The **Configuration Tab** displays the PARS Reporter system settings. When you create a new Activity, certain fields will be automatically populated with the default data defined on this page.

Note that the yellow fields are required fields, whereas the white one are optional

Enter your **Partner Vendor Code**.

If you wish to pre-title your new activities, you can enter a default name in the **Default Partner Activity Title**, and **Default Partner Activity Number** in the appropriate entry fields.

Enter a **Default CIDA Contribution Percentage** if desired. This is used to calculate a contribution value on the Activity Contribution page, based on the amounts of Disbursements entered in the system. (The Disbursements tab is not available in PARS Reporter Lite.)

Please refer to your CIDA documentation if you are unaware of the correct entries. Or further sections in this manual: (Activity – Information and Contribution sections)

The **PARS Files Output Directory** is the place on your hard drive where you would like the exported PARS files to be stored. Use the Set Directory button to select an existing directory.

According to CIDA's naming conventions, the name of a PARS output file is:

1. The word "pars"
2. Followed by your organization's Partner Code
3. Followed by an underscore
4. Followed by the current calendar year
5. Followed by a five digit file number
6. Followed by the extension ".dat"

To comply with CIDA file naming conventions, the **PARS File Output Filename** should be "pars", followed by your **Partner Vendor Code**. When exporting an Activity, PARS Reporter automatically creates the filename by concatenating items 1 through 6. The five-digit file number (item 5) is automatically incremented by the system, and the current value is displayed here as **Counter**. You may

reset this at any time. Note that when it comes time to perform your export, you will have the option of changing the **Output Directory** and **Filename** on the individual Project/Activity.

Note that CIDA requires that all PARS Files that are submitted arrive in numerical order. This means that the final name of the file that is sent to CIDA MUST follow the previously submitted PARS File. Use the Counter field to increment or decrement the counter value if necessary.

Note also that if a PARS .dat file is rejected by CIDA, you will need to resubmit the corrected file using the same file name as the rejected one. You can decrement the Counter value and then click Save Edits in the Configuration tab to reset the counter value.

Note also that you can manually “rename/renumber” the PARS .dat file using the Operating System’s file rename function once the file is created in your Output Directory.

Enter the path to your local Word Processor and Spreadsheet applications if you wish to auto-launch these applications after exporting certain reports from PARS Reporter.

Note that if you do not click **Save**, your Configuration changes will be lost.

3.4 Partners Tab

The **Partners Tab** is used to maintain your master list of Partners, and their contact information.

Partner Name	Active	Address
AEL		ASSOCIATION OF EVANGELICALS OF LI
BADS		BUREAU D'AIDE ET DE DEVELOPPEME
BUU		BAPTIST UNION OF UGANDA Baptist Un
CAMA VIETNAM		CAMA SERVICES VIETNAM Vietnam Wor
CCB		CAMBODIA COMMUNITY BUILDING (CCB
CREDIT		CREDIT Phnom Penh, Cambodia
CREDO		CREDO Christian R&D Organization 01 BP
DDS/DCT ANG. CH		DDS/DCT ANGLICAN CHURCH OF TANZ
EFICOR		EVANGELICAL FELLOWSHIP OF INDIA C
EFZ		EVANGELICAL FELLOWSHIP OF ZAMBIA
FCC		FUNDO DE CREDITO COMUNITARIO \
GENESIS		GENESIS
KOINONIA		KOINONIA Plot-32, Molika Housing Societ
NEICORD		North East India Committee on Relief and C
PHILRADS		PHILRADS
VARIOUS		VARIOUS
WRAA Cambodia		World RAA Cambodia

To add a new partner, click **Add**. This will create a new entry in the list – “New Partner” followed by a unique number. Simply edit the data to suit your needs, and click **Save Edits**.

To change a partner’s information, select the partner’s name in the list on the left. That partner’s name and contact information will appear in the text boxes to the right. You may edit the **Partner Name**, **Partner Contact Information** and **Part Inactive** status on this screen. Click on **Save Edits** to save the new information. If you do not click **Save Edits**, the changes will not be saved.

To remove a Partner from the Partner choice list that appears when your wish to add a Partner to an Activity, turn on the **Set Partner Inactive** checkbox.

To delete a Partner, select the partner’s name from the list and click **Remove**. (In most cases, it is recommended to use the **Set Partner Inactive** checkbox instead of removing Partners.) Note that you will not be able to delete a Partner from this list if they have already been added to a Project/Activity. In this case, you would have to go into each Project/Activity that uses this Partner and remove the linkage to this Partner prior to removing them from PARS Reporter entirely.

Further Partner Information such as Partner E-mail Address, Partner Details Text and Partner Chronology Text is available by clicking on the **Partner Details** button.

Click on the **Export Partners** button to view a word processor document that lists all your partners and their particulars including activities that they are partnered on.

These Partners will be displayed in the list of available Overseas Partners that can be associated with a Project/Activity. You will see more about this in the Activity Information section.

3.5 Schedule Viewer Tab

Title	Activity Title	Scheduled	Actual	Delay	Type
Interim Report	Orissa Cyclone Rehabilitation	11/15/2001	00/00/00	0	Internal Report
2nd Payment (\$10,000)	Orissa Cyclone Rehabilitation	11/20/2001	00/00/00	0	

Scheduled	Actual	Delay	Activity Title	Disb'mt Amt	CIDA Portion
06/06/2001	06/17/2001	11	COMMUNITY MOBILIZATIONaa	100000	0
12/01/2000	07/07/2000	-147		30000	0
07/31/2000	10/10/2000	71		41000	0
12/21/99	12/21/99	0		45000	0
09/30/99	10/01/99	1		50000	0
04/01/99	04/01/99	0		54000	0

The Schedule Viewer Tab has been added to the Navigator to allow you to view all of the Schedule items on all your Activities on a single screen. Choose the desired type of view using the buttons at the top of the screen.

Upcoming Schedule Items include all items that are scheduled on Active Activities that are scheduled to occur within the next 30 days.

Pending Overdue Schedule Items lists are those scheduled items that were scheduled to occur in the past, but have not occurred yet.

Refer to the Activity – Schedule Tab section to learn how to add Schedule items to your Activities.

Note: This screen is not available on PARS Reporter Lite.

3.6 Utilities Tab



The **Utilities Tab** contains several tools to access the data in PARS Reporter:

The **Export All Activities To Excel** export utility creates a data dump in Microsoft Excel format for you to see all data in the PARS Reporter system. Flexible graphing and allocation analysis can be performed within the Excel spreadsheet. Use this export when you wish to report on Project/Activity data from PARS Reporter. Note: This option is not available on PARS Reporter Lite.

The **Ad-hoc Reports / Charts** option displays a PARS Data Wizard page and allows you to create and save templates for custom reporting of PARS data across all the Projects/Activities in PARS Reporter.

Note: This option is not available on PARS Reporter Lite.

Nufocus PARS Reporter

PARS Data Wizard:

1. Select a data type to report:

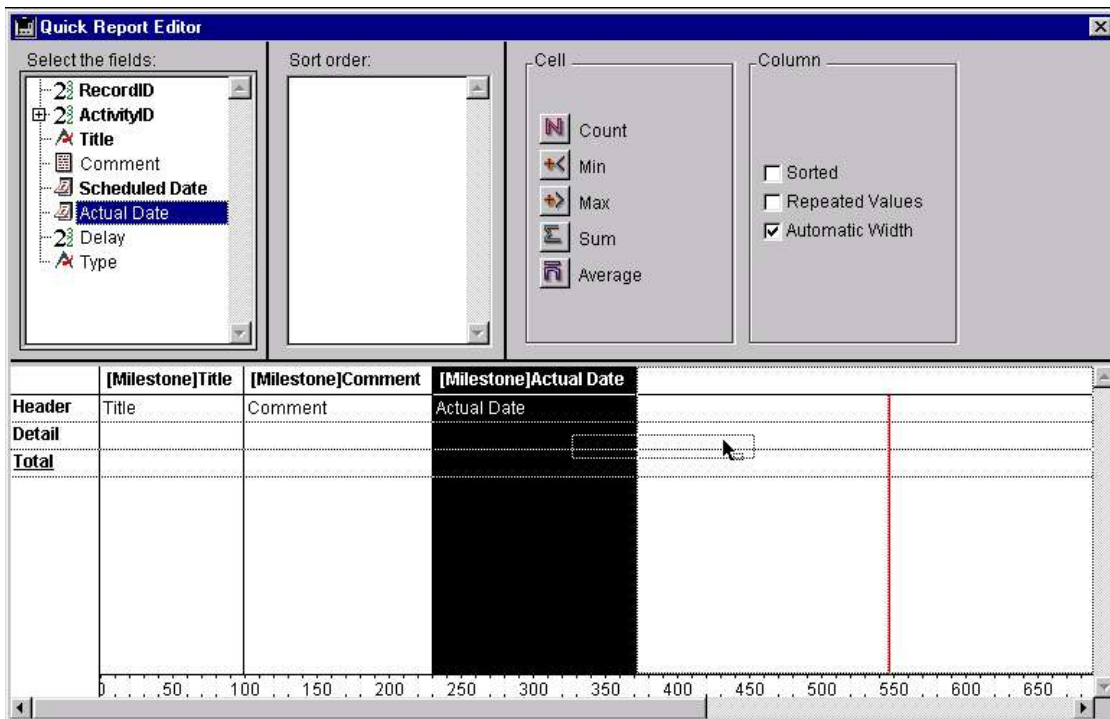
- Activity
- Partners on Projects
- ODA
- Country
- Sector
- Theme
- Finance
- Metrics
- Schedule
- Partner Library

2. Define the data selection:

All Records:

3. Proceed with data preparation...

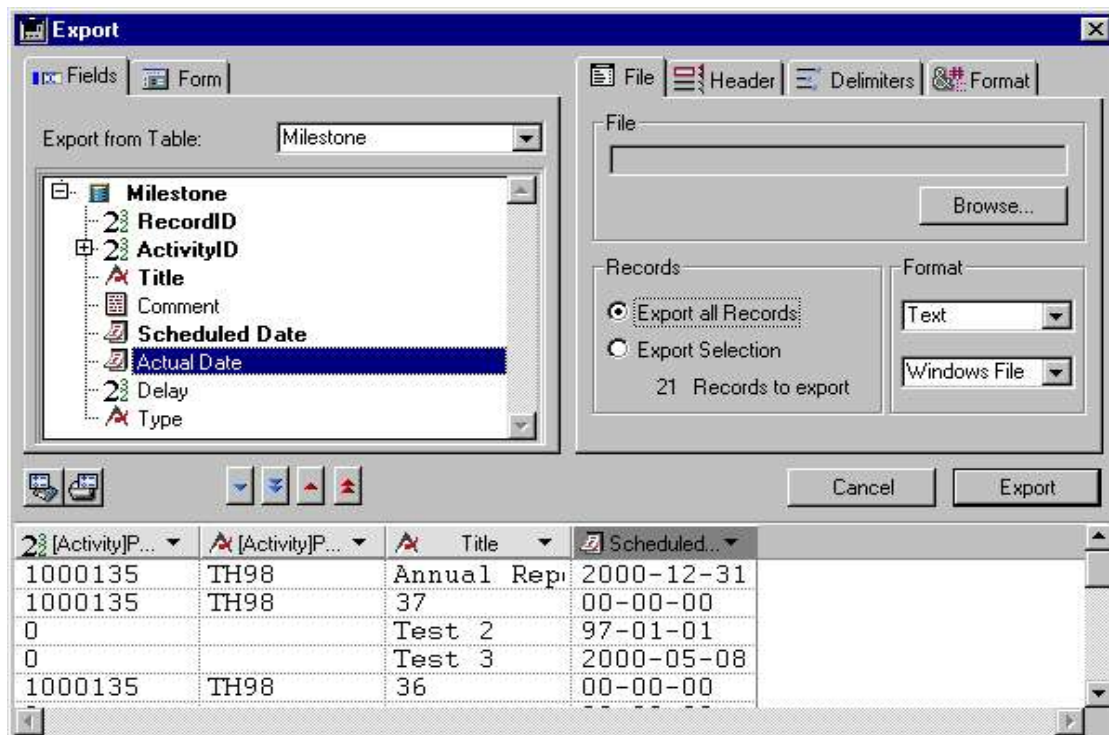
1. First, select the data type from the scroll area on the left.
2. Click on the Query button to find records of a certain type, or click on the All Records button to list all the records in PARS Reporter.
3. Click on the Report button to display the template editor. Drag and drop the desired fields into the report template. See below.



Once a template is created, it can be saved and re-loaded using the File... Save As... and File... Open... menu items respectively. Reports can be printed or exported.

To export to Excel format choose File... Print Destination... Disk File, and then Choose File... Print. Name the file with a .xls extension.

The **Export Wizard** option also allows you to create and save templates for custom exporting of PARS data across all the Projects/Activities in PARS Reporter. This option is the recommended approach if you wish to export data from the associated tables such as Finance, Partner, Metrics, Schedule. Note: This option is not available on PARS Reporter Lite.



To export data using the Export Wizard:

- 1) On the Export dialog, where it says Export From Table on the left side, click on the popup and choose the desired table.
- 2) Then click on the Export all Records choice on the right-hand side of the screen.
- 3) On the left hand side again, click on the little blue icon below the list of fields in the chosen table that has two arrows down on it. Data should appear below.
- 4) If you do not want certain columns, click your mouse on the column in the data below, and click once on the icon with the single red arrow up.
- 5) Click on the Browse button and type a file name and save it to the desktop or somewhere you prefer.
- 6) Click on the Export button. The data will be exported. Open the data file using a spreadsheet package such as Microsoft Excel.

The **Import New Lookup Files** option lets to import updated Lookup files into PARS Reporter. Periodically, CIDA may amend the lists that contain the ODA, Sector, Country, and Theme information. To update your copy of PARS Reporter, the new list files must be placed in the Lookup_Data folder, which is found in the PARS Reporter directory on your computer. A complete selection of files must be located in this directory. For single user setups, the files are imported by simply clicking on the **Import** associated button. For client-server installations, a directory select dialog lets your locate the Lookup_Data directory on your computer. (The original files will be found on your 4D Server host computer.) Please contact Nufocus Inc. to receive your new lookup files.

The **Export for Pivot Table or Pivot Chart** option allows you to export a special file dedicated to creating Pivot Tables or Pivot Charts in spreadsheet application such as Microsoft Excel. Pivot Charts allow you to view PARS Reporter data in complex relationships such as CIDA Cash by Sector and by Country simultaneously. Note: This option is only available on PARS Reporter enhanced versions.

4.0 The Activity Information Screen

The **Activity Information** Screen is displayed when an Activity is opened from the **Navigator Activities Tab** page. To open an Activity, double-click on it in the listing, or select an Activity and click the **Open Activity** button.

Once an Activity is opened, edits to **Activity Information** are done on the various tabs of this screen. Similar to the main Navigator screen, the **Activity Information** Screen features a tab control which you can use click on to move from page to page.

Each of the first eight pages corresponds to a PARS record type. Page one contains the “Type 10” information. Items with a yellow background are mandatory, and you will be unable to export if they are not filled in.

The ninth tab, **Internal Comments** is a free-form text field that allows you to enter any other internal information that you wish to track concerning the Activity. This data does not get transmitted to CIDA.

The tenth tab, is the Export control page that allows you to error-check and subsequently create the PARS File on your computer hard drive. Note that PARS Reporter does not actually send the file to CIDA, it only prepares it for transmission. Other FTP software is required to make the actual data transmission to CIDA. Refer to Section 5.0 for further details. Contact Nufocus Inc. at support@nufocusinc.com if you require help in this area.

Tabs 11 through 13 allow you to track enhanced Activity information in PARS Reporter. See below.

4.1 The Activity Tab

The screenshot displays the 'Activity Information: Financial Education' window. It features a tabbed interface with the following tabs: Activity, Description, Partners, Contribution, ODA, Country, Sector, Theme, Internal Comments, PARS Export, Finance, Metrics, and Schedule. The 'Activity' tab is currently selected. The form contains several input fields, many of which have a yellow background indicating they are mandatory. These fields include: Program Number (SV19, DEBT BURDEN MANAGEMENT, 2000), CIDA Activity Number (blank), Partner Vendor Code (2345987), Partner Activity Number (FIE-12000), Partner Activity Title (Financial Education), Canadian Secondary Partner (0), Approval Date (01/01/2000), Completion Date (12/30/2000), Investment (RESP - Responsive), Investment Type (PROJ - Projects), Investment Characteristics (INFL - Influence and Leverage), Delivery Mechanism (blank), and Status (OPER - Operational). Each of these fields has an 'Info' button next to it. At the bottom of the window, there are three buttons: Print, Cancel, and Save.

The **Activity Tab** contains the basic information about the Activity: **Program Number, Name, Numbers, Partner** relationships, Activity dates, and various **Investment, Delivery** and **Status** settings. Note that the yellow fields must be entered before a PARS export file can be created in PARS Reporter.

When you first open a new Activity, you will notice that many fields will be set to the defaults that you specified under the **Configuration Tab** on the **Navigator Screen**.

The **CIDA Activity Number** is supplied by CIDA to you. It can remain blank on the initial PARS file submission. Please update this field upon reception of the number from CIDA.

Clicking on the down arrow next to certain fields will produce a drop-down box from which you may select various items. These drop-downs have been populated with the latest CIDA standard choices for your convenience.

Additional Information describing the Investment choices and the Delivery Mechanism choice can be viewed by clicking on the **Info** button to the right of the choice options. Note that a Closed Activity can not be sent to CIDA.

4.2 The Description Tab

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | Country | Sector | Theme | Internal Comments | PARS Export | Finance | Metrics | Schedule

Description:

This description will be forwarded to CIDA in the PARS upload file.

Comments:

This comment will be forwarded to CIDA in the PARS upload file.

Print Cancel Save

This page contains two scrollable text fields for the Activity **Description** and Activity **Comments**. These correspond to Type 20 and 25 in the PARS export file. You must enter a **Description** prior to export of the PARS file for CIDA.

4.3 The Partners Tab

The screenshot shows a software window titled "Activity Information: Financial Education". It has a tabbed interface with the following tabs: Activity, Description, Partners, Contribution, ODA, Country, Sector, Theme, Internal Comments, PARS Export, Finance, Metrics, and Schedule. The "Partners" tab is currently selected. Below the tabs, there is a section labeled "Partner Listing:". Inside this section is a table with two columns: "Partner Name" and "Address". The table contains one row of data: "Example Partner Nai" and "123 Example Street Ottawa, ON K3Y 4T5 Canada Tel: Fax: Contact: E-mail: Remc". Below the table, there are two buttons: "Add" and "Remove". At the bottom of the window, there are three buttons: "Print", "Cancel", and "Save".

Partner Name	Address
Example Partner Nai	123 Example Street Ottawa, ON K3Y 4T5 Canada Tel: Fax: Contact: E-mail: Remc

The **Partner Tab** contains the names of the Overseas Partners for this Activity. This corresponds to the Type 30 data in the PARS specification. To remove a Partner, select it in the list and click **Remove**.

To add a Partner, click **Add**. This will display a list of all of the OS Partners in PARS Reporter (as defined by you under the **Partners Tab** in the **Navigator**). To select a Partner, either double-click on the name, or click on the name and click **OK**.

The screenshot shows a dialog box titled "Select a Partner". It has a list box containing four entries, each with a partner name and an address. The third entry, "Partners for Peace", is selected. At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Helping Hand CDA	1 Helping Hand Way Toronto, ON M5E 4T6 Canada
New Partner22	Enter Partner Contact Information Here
Partners for Peace	1273 Kent Square Calgary, LB T3P 8R4 Canada Tel: 403-459-3527
Save Those Kids CDA	123 John Street Ottawa, ON K3Y 4T5 Canada

4.4 The Contribution Tab

Activity Information: Financial Education

Activity | Description | Partners | **Contribution** | ODA | Country | Sector | Theme | Internal Comments | PARS Export | Finance | Metrics | Schedule

Contribution Information:

CIDA Cash Contribution: 203000
Partner Cash Contribution: 45000
Other Donor Cash Contribution: 0
Partner Inkind Contribution: 0
Other Donor Inkind Contribution: 0
Total: 248000

Internal Disbursement Information:

CIDA Contribution Percentage: 0.0% Calculated Cumulative Disbursements: 0 Info

CIDA Disbursement Information:

Disbursement Date: 00/00/00 Cumulative Disbursement(s): 123000
(CIDA Cash Contribution only)

Print Cancel Save

The **Contribution Tab** contains the basic financial information for the Activity. Changing any of the enterable **Contribution** amounts will cause the **Total** to be recalculated. As Disbursements occur, enter the amount and Date in the **CIDA Disbursement Information** fields.

Note that the total **Cumulative Disbursement(s)** amount (bottom right of screen) must not exceed the **CIDA Cash Contribution** figure. If a **Cumulative Disbursement** amount is entered, then a valid **Disbursement Date** is required. Periodically, red warning text may appear in the bottom right hand corner of the screen advising you of date or dollar amount discrepancies.

You can use the **Internal Disbursement Information** section to help calculate the correct **Cumulative Disbursement(s)**. The **CIDA Contribution Percentage** value is an internal value only that is used to generate a **Calculated Cumulative Disbursement** amount based on the information tracked in the **Finance** Tab. Click on the **Info** button for more information about this feature. Note that the data in the **Finance** Tab (and **Metrics** and **Schedule** Tabs) are not forwarded to CIDA.

4.5 The ODA Priority Tab

Activity Information: Financial Education

Activity | Description | Partners | Contribution | **ODA** | Country | Sector | Theme | Internal Comments | PARS Export | Finance | Metrics | Schedule

ODA Summary

Code	Description	Allocation
106	Water and Sanitation	20.00
100	Basic Human Needs	50.00
600	Environment	30.00

ODA Info Add Remove

Total Percent: 100
Total Percent Remaining: 0

Print Cancel Save

The **ODA Tab** is used to define the ODA Priority Allocations for the Activity. Priorities are added and removed in the same way as Partners, with the same kind of choice list:

Select an ODA Priority

- 100 Basic Human Needs
- 101 Primary Health Care
- 102 Basic Education
- 103 Family Planning & Reproductive Health Care
- 104 Food and Nutrition
- 105 Nutrition - Emergency
- 106 Water and Sanitation
- 107 Shelter
- 108 Humanitarian Assistance
- 199 Integrated Basic Human Needs
- 200 Gender Equality
- 201 Gender Equality is the principle objective/result

OK Cancel

Once an ODA Priority has been added, you can adjust the allocation by *double-clicking* on the number in the **Allocation** column. When the number is changed, and you press tab or enter, or click out of the cell, the **Total Percent** and **Total Percent Remaining** numbers will be recalculated. The **Total Percent** allocation must equal 100% before the export can be performed.

4.6 The Country and Sector Tabs

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | **Country** | Sector | Theme | Internal Comments | PARS Export | Finance | Metrics | Schedule

Country Summary

Code	Description	Allocation
AO	Angola	100.00

Total Percent:
Total Percent Remaining:

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | Country | **Sector** | Theme | Internal Comments | PARS Export | Finance | Metrics | Schedule

Sector Summary

Code	Description	Allocation
11110	Education policy and administrative management	60.00
11120	Education facilities and training	30.00
11200	Basic education	10.00

Total Percent:
Total Percent Remaining:

These tabs are used to set the **Allocations** for **Country** and **Sector** respectively. Similar to the **ODA Summary Tab**, Countries and Sectors can be added and removed using the appropriate buttons and Allocations can be edited by double-clicking, and then typing the correct percentage in the **Allocation** column. Remember to **Save** your edits.

4.7 The Theme Tab

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | Country | Sector | **Theme** | Internal Comments | PARS Export | Finance | Metrics | Schedule

Theme Summary

Code	Description
105	Capacity Development
102	Human Migration/Refugees

Info Add Remove

Print Cancel Save

The **Theme Summary Tab** allows you to associate multiple Themes to an Activity. Use the **Add** and **Remove** buttons to edit the contents of the list of Themes.

4.8 The Internal Comments Tab

The screenshot shows a web application window titled "Activity Information: Financial Education". It features a series of tabs at the top: "Activity", "Description", "Partners", "Contribution", "ODA", "Country", "Sector", "Theme", "Internal Comments" (which is selected), "PARS Export", "Finance", "Metrics", and "Schedule". Below the tabs, the "Internal Comments" section is displayed. It contains a text area with the instruction: "This internal comment area is for your own organisation's comments and will not be forwarded to CIDA." The text area is empty and has a vertical scrollbar on the right. At the bottom of the window, there are three buttons: "Print", "Cancel", and "Save". A red text message at the bottom right of the main content area states: "Data on this page is not transmitted to CIDA."

The **Internal Comments Tab** allows you to collect internal comments about an Activity. These comments will not be exported out of PARS Reporter in the CIDA PARS file.

4.9 The Export Tab

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | Country | Sector | Theme | Internal Comments | **PARS Export** | Finance | Metrics | Schedule

Export Readiness Tests

Page 1 Mandatory Fields:	Passed
Valid Activity Status:	Passed
Page 2 Mandatory Fields:	Passed
At Least One Overseas Partner:	Passed
Valid Disbursement Date:	Passed
CIDA Cash exceeds Cumulative Disbursement:	Passed
ODA Allocation = 100%:	Passed
Country Allocation = 100%:	Passed
Sector Allocation = 100%:	Passed
Default Output Directory Exists:	Passed

Next Export Filename:

PARS Export

Print Cancel Save

The **Export Tab** contains the data completeness tests and export information required when you are ready to perform the export from PARS Reporter to an output file. When displaying this tab, PARS Reporter automatically tests your Activity to make sure it is valid and complete relative to CIDA's PARS specification. The following criteria must hold for an Activity to be exported to a PARS compliant file:

1. The fields marked as **mandatory** (i.e. yellow background) must be filled in on the various Activity tab pages.
2. There must be at least one Overseas Partner on the **Partner Tab** page.
3. Each of the **Total Allocations** (ODA Tab, Country Tab, and Sector Tab) must equal 100%.
4. A directory must exist on your hard drive in the location specified in the **Output Directory** field on the **Navigator Configuration Tab**.

If these tests pass, the **Export** button will be active. The **Export Filename** is partially determined by the default **Output Directory** and **Output Filename** set in the **Configuration Tab** on the **Navigator** Screen. PARS Reporter adds the calendar year and the **Counter**. This field is editable, so you can change the **Export Filename** as you wish.

If any of the tests fail, the screen will look similar to the following figure:

Activity Information: Financial Education

Activity | Description | Partners | Contribution | ODA | Country | Sector | Theme | Internal Comments | **PARS Export** | Finance | Metrics | Schedule

Export Readiness Tests

Page 1 Mandatory Fields:	Failed	GoTo
Valid Activity Status:	Failed	GoTo
Page 2 Mandatory Fields:	Passed	
At Least One Overseas Partner:	Passed	
Valid Disbursement Date:	Failed	GoTo
CIDA Cash exceeds Cumulative Disbursement:	Passed	
ODA Allocation = 100%:	Passed	
Country Allocation = 100%:	Passed	
Sector Allocation = 100%:	Passed	
Default Output Directory Exists:	Failed	Create

Next Export Filename:

PARS Export

Print Cancel Save

The **Export** button will be dimmed, and you will be unable to export. The **Go To** buttons allow you to go directly to the page on the **Activity Information** screen that contains the invalid or missing data. Click on these buttons to revert to the correct tab page and make the required correction. Then click on the **Export Tab** again to view the Export Readiness.

Once you are happy with your data, and all of the tests pass, return to the **Export Tab**. You can then export the Activity to a PARS compliant file if you want to create a PARS File for a single activity. Once you click on the **Export** button, the file will be created, and a dialog will inform you that the export has been completed. The five-digit number that comprises the last five characters of the filename will increment in readiness for your next export. Look for your PARS file in the directory specified in the **Export Filename** path. Note that CIDA prefers that PARS files are submitted with multiple activities instead of many single activity PARS files.

Important Note: PARS Reporter does NOT send the PARS file to CIDA as part of the Export process. Please refer to Section 5.0 for further information regarding sending your PARS .DAT Files to CIDA.

Remember to **Save** your changes once you have made edits in the **Activity Information** screen. If you click on the **Cancel** button, then all edits will be lost.

4.10 Activity Printing

The **Print Activities** button at the base of the **Activity Information** screen allows you to print a summary report of all the information about the Activity. To print the report, click on the **Print Activities** button, select the Activity Detail Report option, choose your printer settings, and then click OK to proceed. These printouts can be very valuable hard copy records of your PARS data.

CCA Testing Activity Report: S-053910

NEAK LOEUNG CREDIT

Printed: Mar 27, 2002
17:47

Activity Information		Contribution Summary	
CIDA Activity Number:	S-053910-029	CIDA Cash Contribution:	78365
Vendor Code:	1002249	Partner Cash Contribution:	52244
Partner Activity Number:	648	Other Donor Cash Contribution:	0
Canadian Secondary Partner:	0	Partner Inkind Contribution:	0
Approval Date:	12/31/2000	Other Donor Inkind Contribution:	0
Completion Date:	12/31/2001	Total:	
Investment:	RESP	Disbursement Summary	
Investment Type:	PROJ	Cumulative Disbursement(s):	78365
Investment Characteristics:		Disbursement Date:	12/31/2000
Delivery Mechanism:		Exported: c:\pars_test\pars1002249_200100018.dat on Aug 2, 2001 at 16:51	
Status:	TERM		

Activity Description

The program goal is to empower and better the lives of impoverished women and children, using an integrated credit, health education, savings, and community organization approach. More specifically, the Neak Loeung program will:

1. Seek to address the credit and health education needs of 1,248 poor women.
2. Equip these women with basic health and money management training needed to improve health and incomes.
3. Maintain/develop community banks through education, savings, and community building activities to serve 69% of clients. The remaining clients will be served through solidarity groups (29%) and individual loans (2%).
4. Develop institutional capability to administrate CREDIT (Cambodia Economic Development Initiatives for Transformation) through workshops and training of staff.
5. Achieve operational self-sufficiency.
6. Monitor/report regularly to supporters (incl. WRC Canada) on program progress, incl. predetermined indicators.

Poor women organize themselves into either community banks of about 30 women each or solidarity groups of 5-6 women. After receiving training in organization, credit, and health, loans are provided to the women's groups, with loan and interest repayment (at market rates) being motivated by group solidarity/ownership, peer pressure, and the prospect of ongoing credit.

Partner Summary

CREDIT CREDIT Phnom Penh, Cambodia

ODA Summary

504 Local Enterprises 100%

Region - Country Summary

170 KH Cambodia 100%

Sector Summary

24040 Informal/semi-formal financial institutions 100%

Theme Summary

100 Poverty Reduction

Internal Metrics Information

Title	Units	Goal	Actual	Comment
# of persons participating in, & benefiting dire	ea	0	0	
Percentage of the direct beneficiaries who ar	%	0	0	
# of direct & indirect beneficiaries	ea	0	0	

A Financial Listing Option is also available from the **Print Activities** button. This prints a listing of all contribution information for a list of Activities.

4.11 Internal Financial Data

Enhanced Financial data can be collected on Projects/Activities using PARS Reporter. The **Finance Tab** allows you to enter and monitor Financial data on individual Projects/Activities.

Click on the various fields to enter the Year, Quarter, Budget, Actual, Scheduled Disbursement, Actual Disbursement and Disbursement Amount. To add additional text data about a Finance item, you can select the item and then click on the Info button.

This data does not get sent to CIDA. On the Navigator Utilities Page, this data can be exported for other purposes by choosing the Export Wizard or the Activity Related Exports options.

Note: This screen is not available on PARS Reporter Lite.

[illegible]

4.12 Internal Metrics Data

Enhanced Metrics data can be collected on Projects/Activities using PARS Reporter. The **Metrics Tab** allows you to enter and monitor budget line item data on individual Projects/Activities.

Click on the various fields to enter the Title, Units, Goal, Actual, and Comments. To add additional text data about a Metrics item, you can select the item and then click on the Info button.

This data does not get sent to CIDA. On the Navigator Utilities Page, this data can be exported for other purposes by choosing the Export Wizard or the Activity Related Exports options.

Note: This screen is not available on PARS Reporter Lite.

