



## Guide for Voluntary Sector Users

### Contents

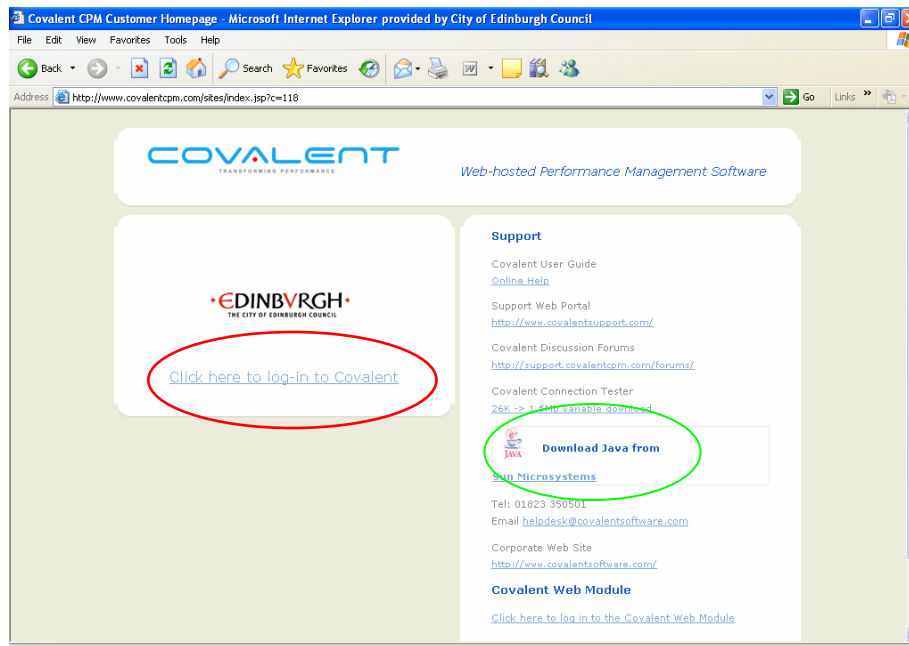
	Page
Logging on	2
Entering indicator data	5
The QA Assessment	8
Printing reports	10
Support arrangements	12

## Logging On

Go to:

<http://www.covalentcpm.com/sites/index.jsp?c=118>

If you will be regularly using the Covalent system you should save this link as one of your Favourites. Note: type this in the address bar, **not** the Google search facility. This link should have been sent to you in an email with this guidance.



Click on the link 'Click here to log-in to Covalent', circled in red above.

**It may take around 20 seconds for the Covalent application to start up. You should only click the link once.**

**NB** You need Java Runtime Environment version 6.0 or more recent to be able to view Covalent. This can be downloaded from the Covalent log in page if not already installed on your machine. (Circled green above).

*For users in last year's pilot*

You will have been provided with a username and password. If you have forgotten your password you can click on the 'forgotten your password' link when prompted for your password and it will be emailed to you. If this is unsuccessful, contact any of the Covalent Team who are listed at the end of this document.

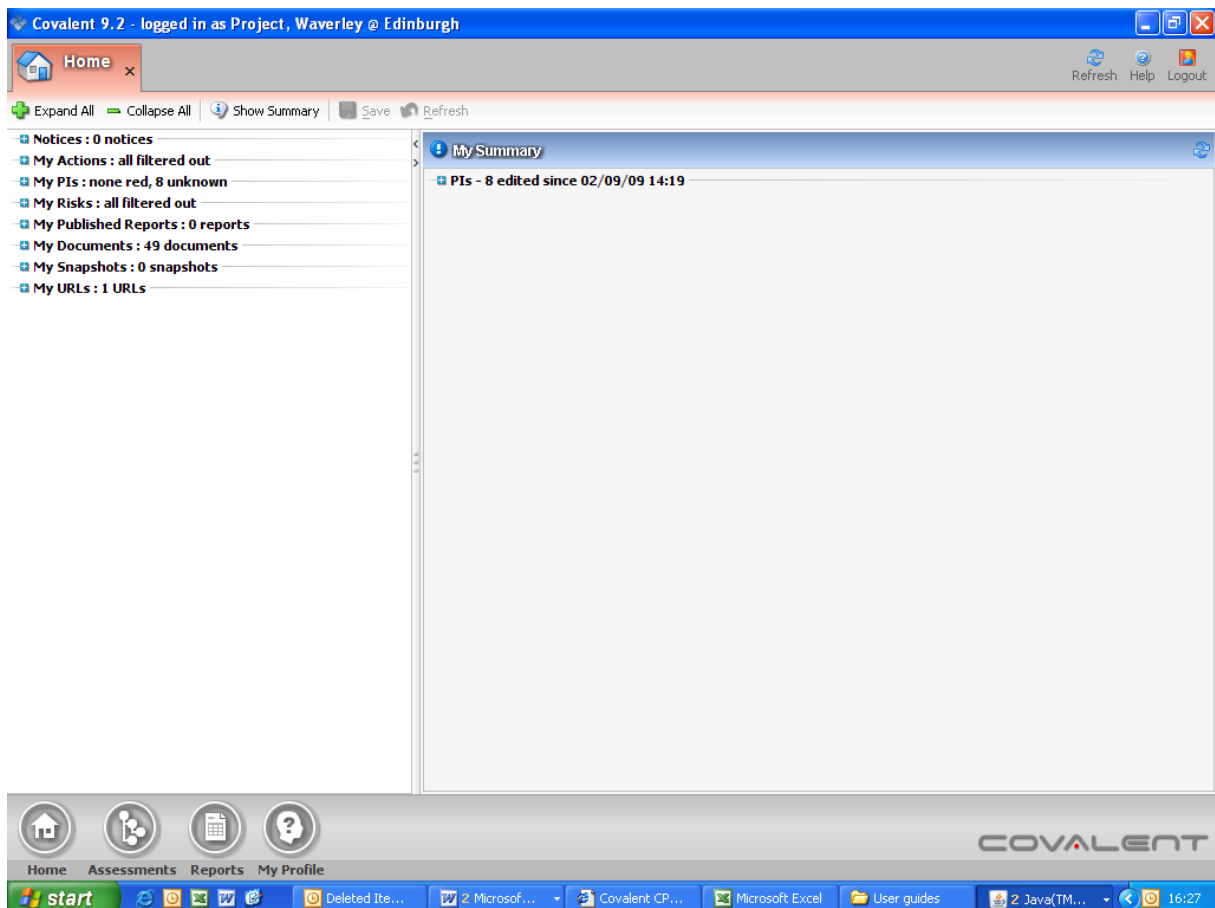
*For new users*

Enter your username and password on the homepage (your username should be in the following format **firstnamesurname** with no punctuation or capitals e.g.

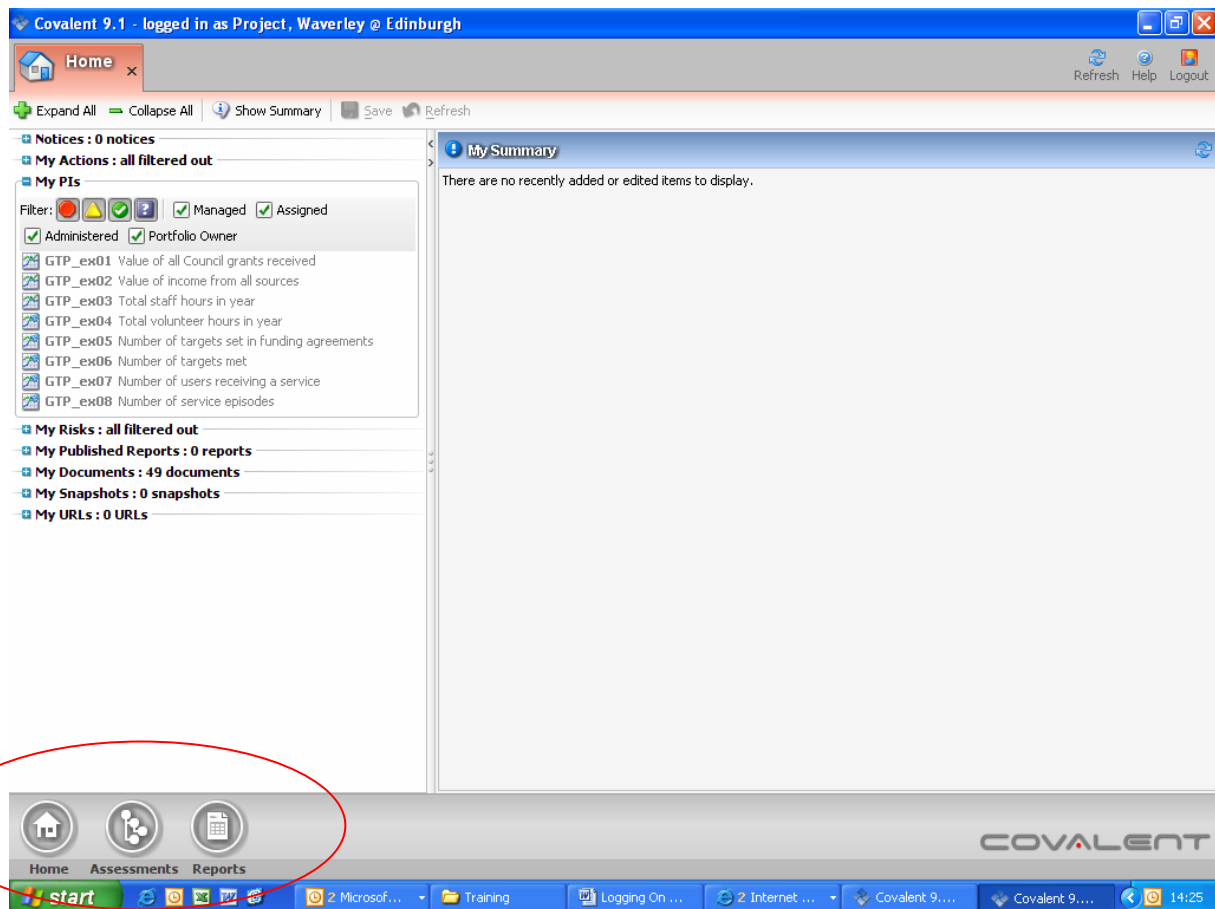
johnsmith). Your password is "covalent". When you click 'login' the system will automatically prompt you to change your password before proceeding any further.



Successfully logging in will result in a screen that looks like this:



## System Navigation



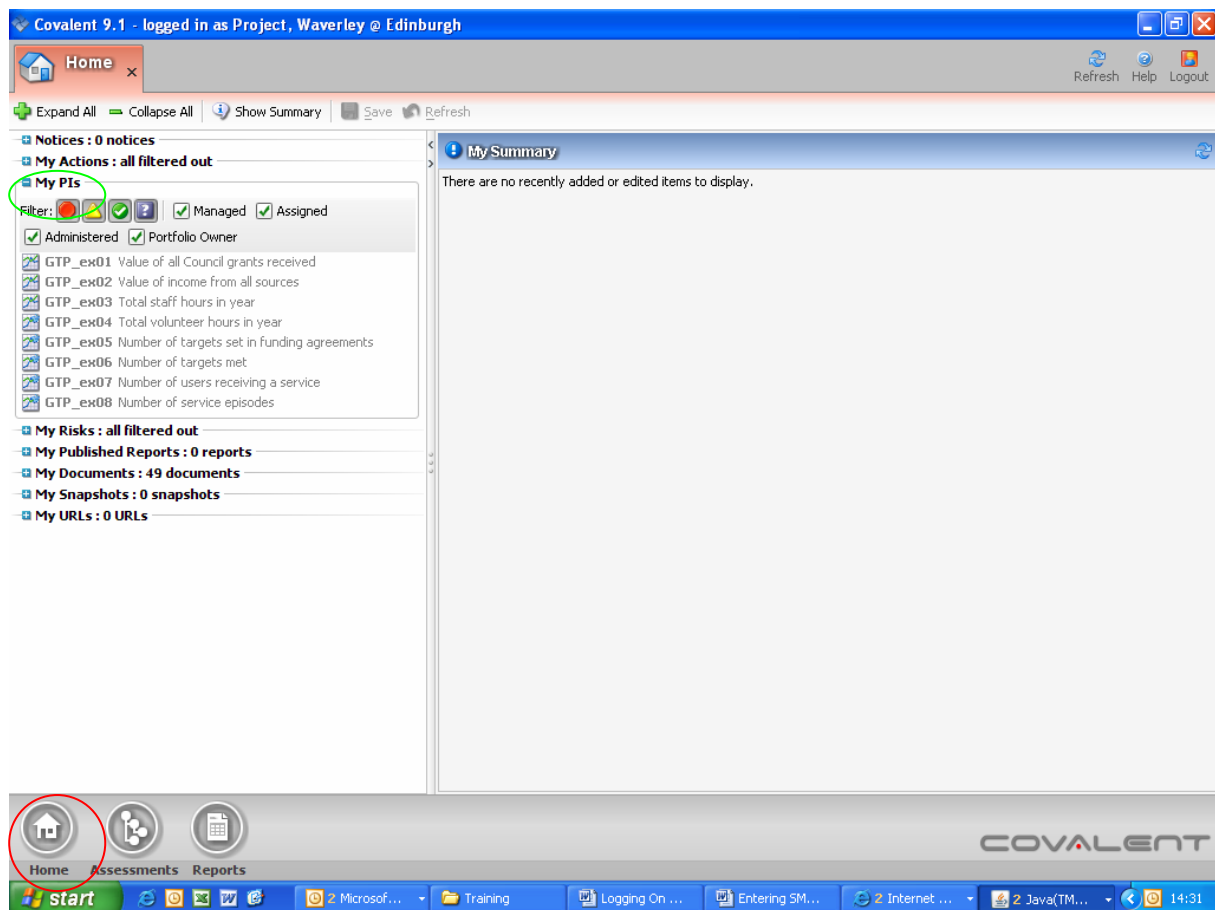
The three buttons at the bottom of the screen (circled in red) entitled Home, Assessments and Reports allow you to enter performance indicator data, complete your Quality Assurance assessment and print a report with the data you've entered. Clicking on the assessment or report buttons opens up a tab where data can be entered and a report run respectively. The home tab is opened automatically when you log in. You can move between tabs by clicking on them. The My profile button allows you to change your password, by clicking on the key icon towards the top left of the screen.

## Entering indicator data

Eight measures that were formerly part of the SMAR return have been retained. This document shows how the data should be collected in the Covalent system.

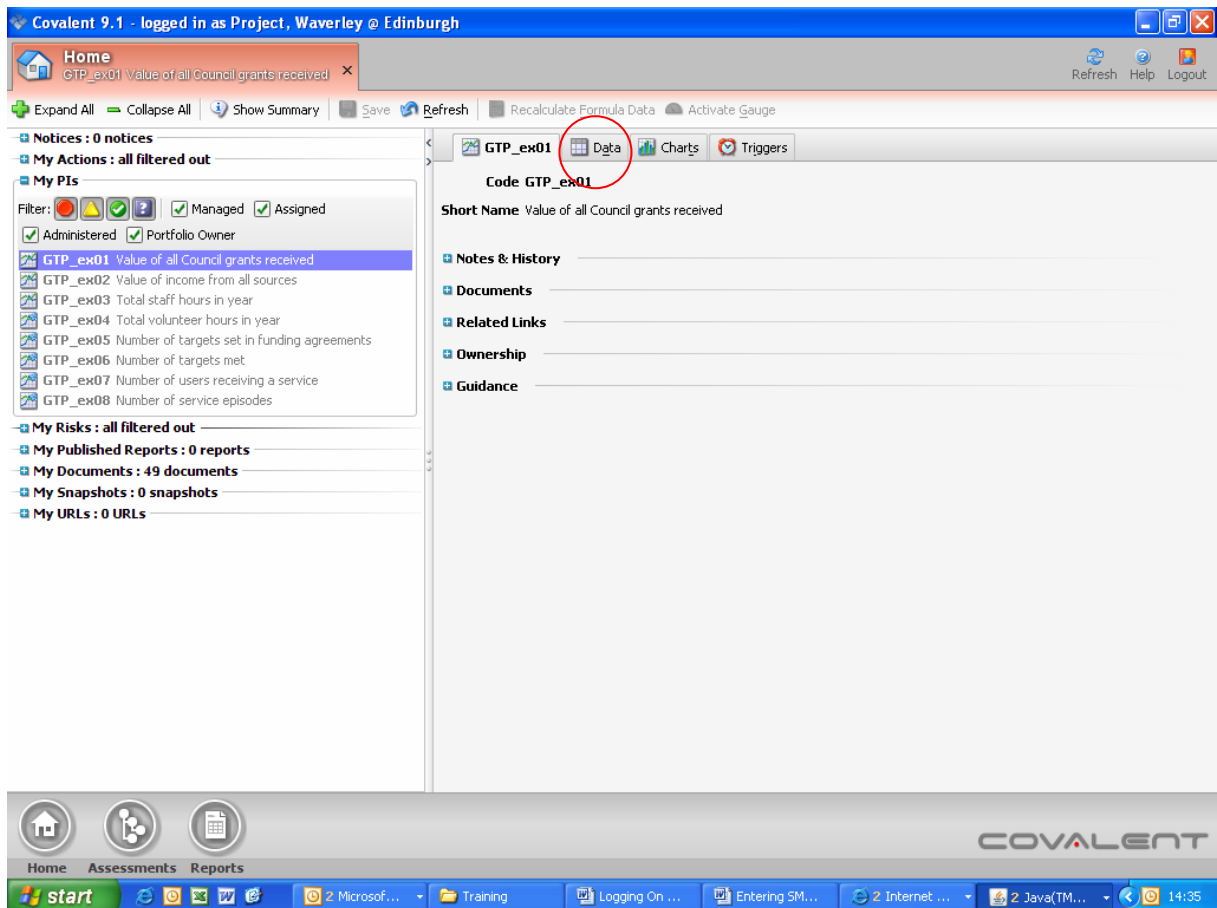
Once logged on to Covalent, your **Homepage** should be displayed (if this does not automatically appear, click on the **Home** button (circled in red) along the panel at the bottom of the screen). On the left hand panel of the screen, you should see all of the items that you have been assigned to.

Any PIs that you are assigned to on the system should appear in the **My PIs** section. Ensure that **My PIs** has been expanded (to expand the details click on the **+** button next to **My PIs**, circled in green below). Also **ensure that all of the filters have been selected** by clicking down the red, amber and green symbols, and ticking the Managed, Assigned and Administered boxes.



## To Update a PI

If you select a PI from the list on the left the full details will be displayed on the right.



To create a simple update to PI you need to go to the **Data** tab (Circled in red above). This will present a table which you will use to record your data.

There should be a data row ready to record the figure for the 2008/09. If you need to add a new row click on **Append**.

The screenshot shows the Covalent 9.1 interface. At the top, the window title is "Covalent 9.1 - logged in as Project, Waverley @ Edinburgh". Below the title bar, there's a navigation bar with "Home" and "GTP\_ex01 Value of all Council grants received". The main toolbar includes "Expand All", "Collapse All", "Show Summary", "Save" (circled in green), "Refresh", "Recalculate Formula Data", and "Activate Gauge".


The left sidebar contains several sections: "Notices: 0 notices", "My Actions: all filtered out", "My PIs" (with filters for Managed and Assigned), and "My Risks: all filtered out". Under "My PIs", a list of indicators is shown, with "GTP\_ex01 Value of all Council grants received" selected.

The main content area is titled "GTP\_ex01 Data". It includes a "Time Periods" section with "Show from" set to 2008 and "until" set to 2010. There are also sections for "Columns" (Status, Long Trend, Short Trend) and "Extra Data" (Benchmarks, Targets). Below this is a table with the following structure:

Time Period	Value	Activated?	Note?	Short Tr...	Long Trend	Status
2008/09		<input type="checkbox"/>				

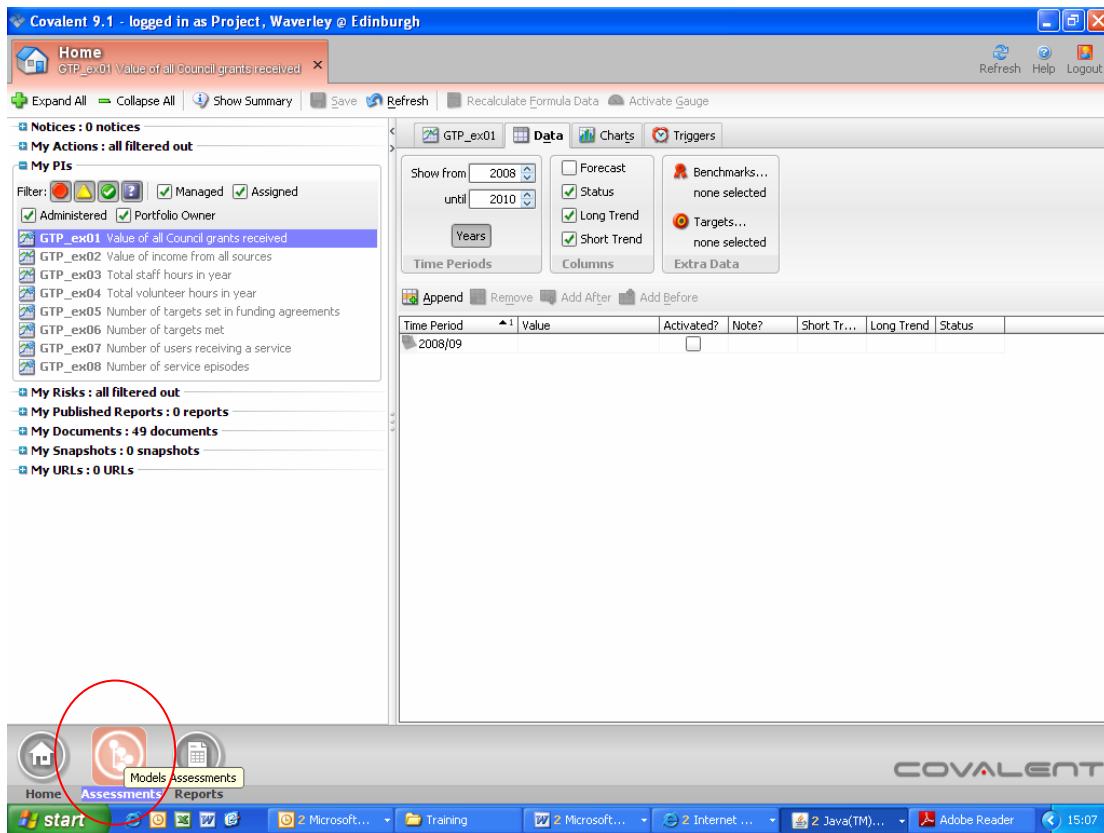
The "Value" and "Activated?" columns in the table are circled in red. At the bottom of the interface, there are navigation icons for "Home", "Assessments", and "Reports", and the "COVALENT" logo. The Windows taskbar at the very bottom shows the start button and several open applications.

To add data simply click on the cell in below the column headed "value" and type in the data. You do not need to use the £ signs as the will enter this for you. When the data has been entered tick the box below the column headed "Activated". Both the value and activated columns are circled in red in the chart above.

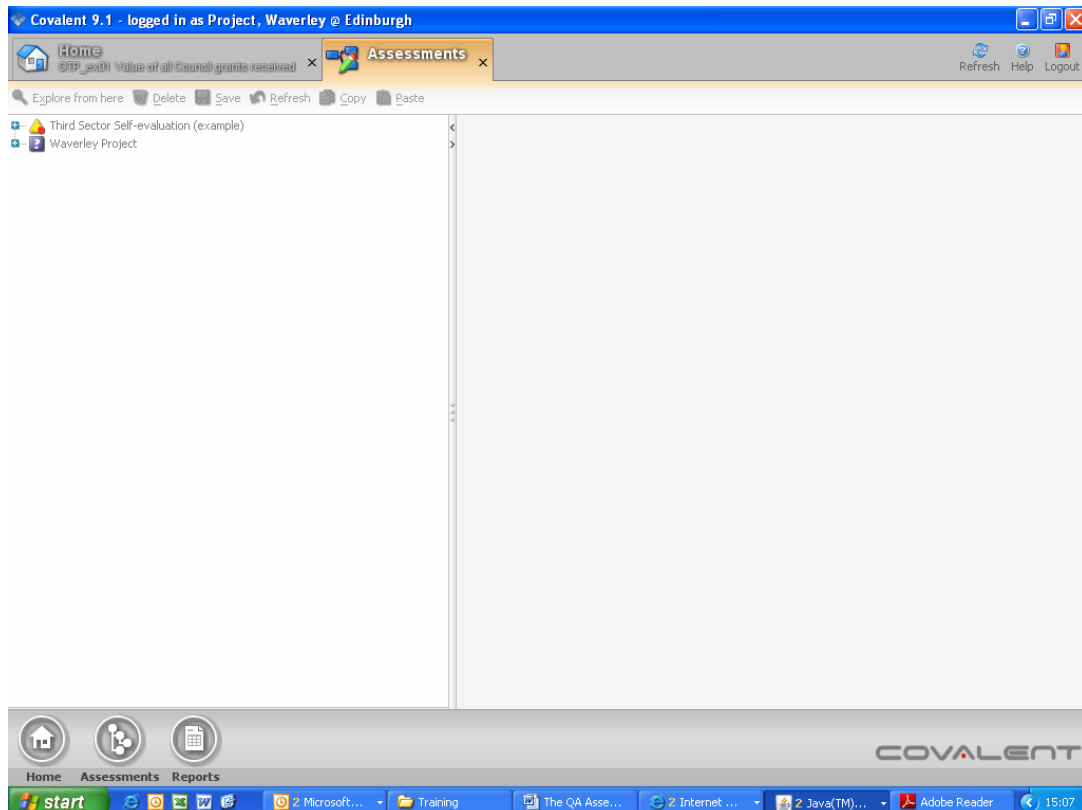
You must then save your data by clicking on  icon which is on the toolbar at the top of the screen and circled in green. Repeat these steps for the remaining seven indicators shown under the section "My PIs"

# Completing the QA Assessment

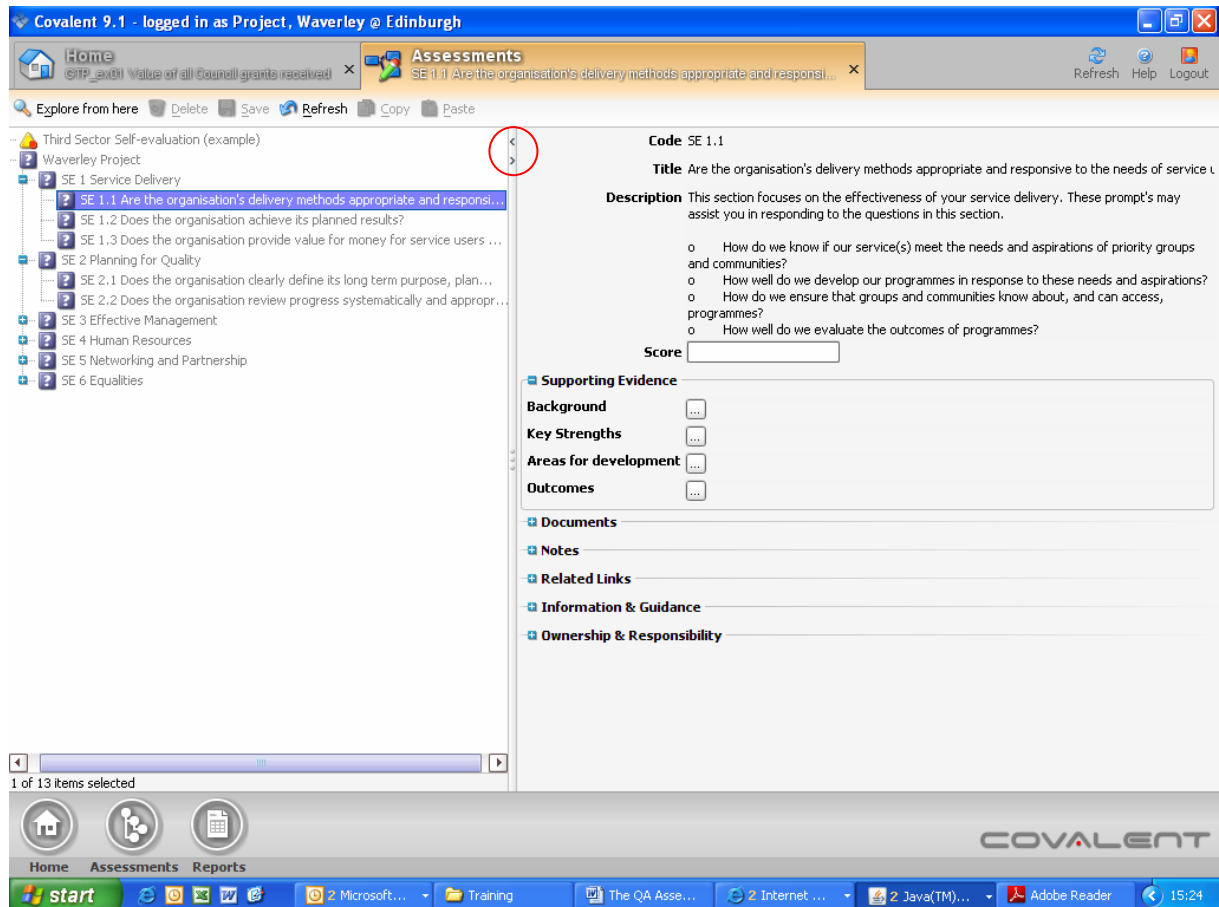
First, click on the Assessment button circled in red below:



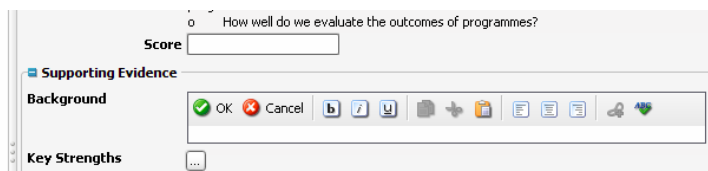
which will open up a new tab that looks like this:


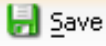


The assessments tab shows a completed assessment entitled “Third Sector Self-evaluation (example)”. The other assessment is the one that you will complete. Click the white crosses in the blue boxes **once** to open up a section and then the questions of the model. Clicking on the crosses for the Service delivery section and then the first question SE1.1, then the cross next to supporting evidence should result in a view like this:



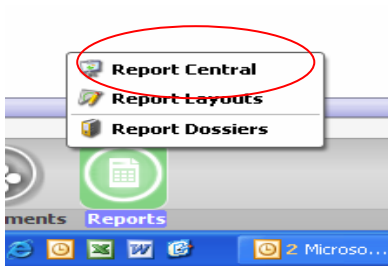
The screen is split vertically and can be adjusted either by dragging and dropping the partition or clicking the small arrowheads. Clicking on the grey squares with three dots will open a box where you can enter your evidence to the question set:



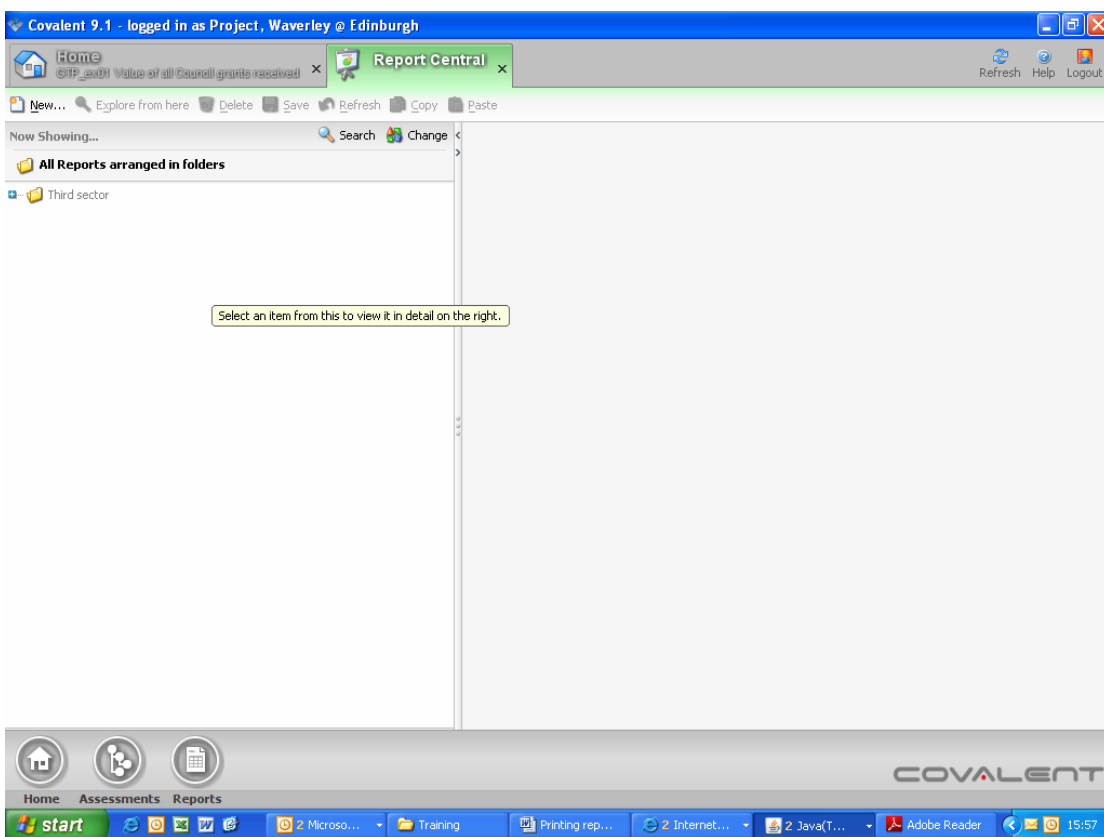
When you have completed your answer, click the  icon and then the  icon. Repeat this for the other questions in this section and then the other questions in section SE2 to SE6. Note that the section entitled Background is optional but that replies are expected for Key Strengths, Areas for development and Outcomes for all questions.

## Printing Reports

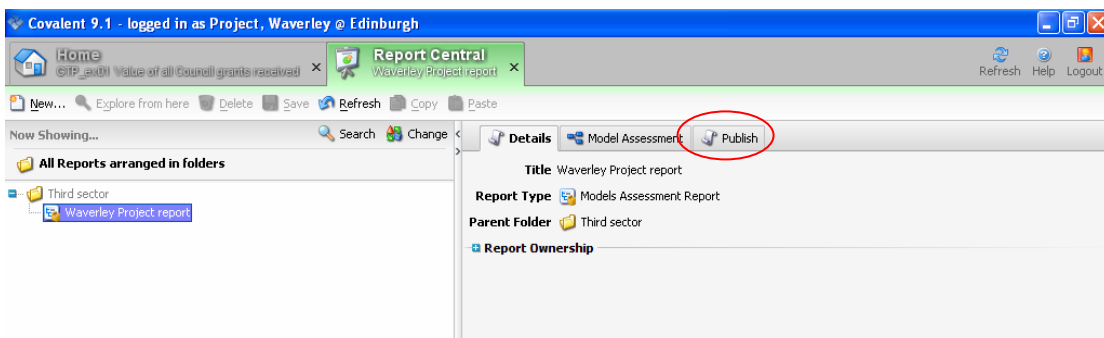
First, click on the Reports button and choose the top option of Report central



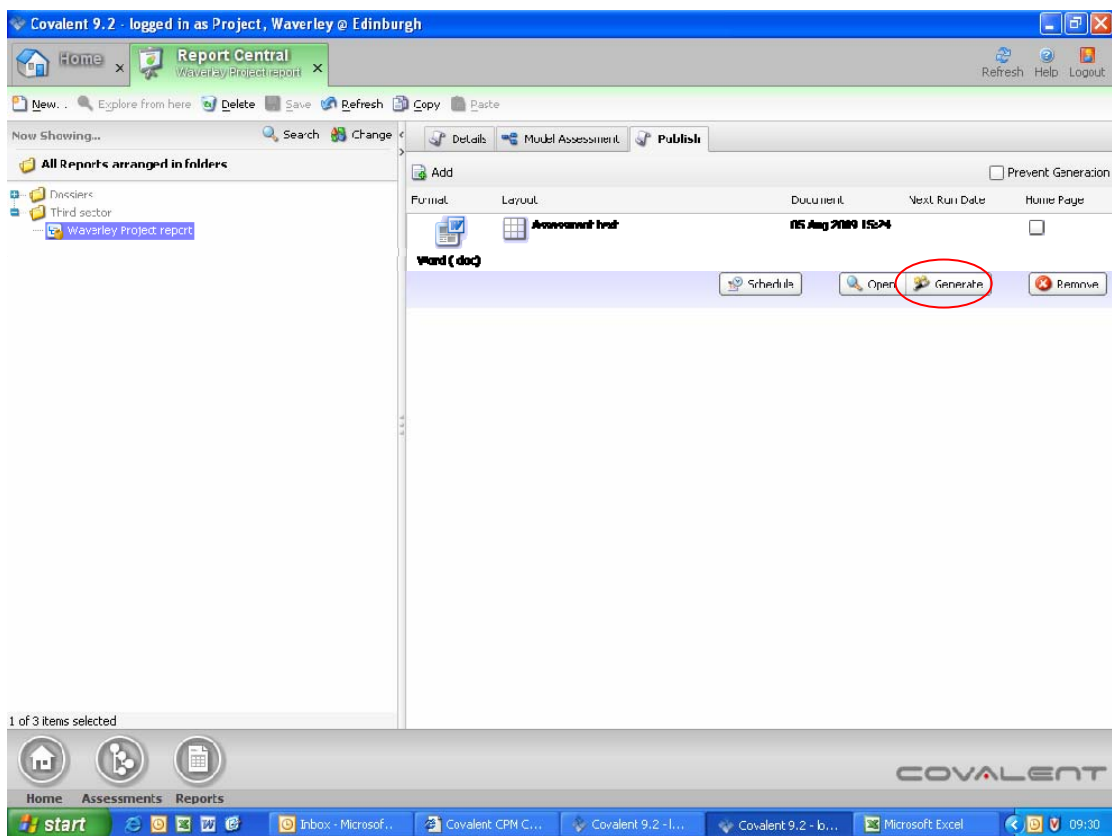
This will take you to a screen that looks like this:




Click on the cross next to Third sector and then click on your report to see a screen like this:

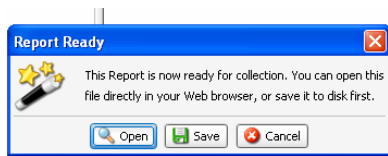


Now select the Publish tab (red circled above) and then click on the layout called Assessment text.



Next click on the  **Generate** icon, located towards the right of the screen.

The following message should appear:



Take the option to open the Report and then save it. You may have to enter your network password, depending on the security arrangements in place in your organisation.

**Note:** Generating a report retrieves the latest data from the system, while opening a report produces a copy of the last generated report, which will **not** include any data entered into the system following generation.

## Support Arrangements

If you experience difficulty in accessing or using the system, please contact the officer in the service with which your organisation works most closely. These are:

City Development	Alison Coburn	529 3149
Health and Social Care	Kate McVie	553 8314
Services for Communities	Graeme Fairbrother	469 3503
Children and Families	David Hoy	469 3457
Culture and Sport	Tracy Scodellaro	529 6720
Corporate Services	Sarah Bryson	469 3887

If these people are unavailable or cannot resolve your issue please contact any of the Covalent Team:

Mairi Cruickshank	469 3863	<a href="mailto:mairi.cruickshank@edinburgh.gov.uk">mairi.cruickshank@edinburgh.gov.uk</a>
Steve Di Ponio	469 3839	<a href="mailto:steven.diponio@edinburgh.gov.uk">steven.diponio@edinburgh.gov.uk</a>
Katie O'Donnell	469 3605	<a href="mailto:katie.o'donnell@edinburgh.gov.uk">katie.o'donnell@edinburgh.gov.uk</a>
Heather Rolls	469 3802	<a href="mailto:heather.rolls@edinburgh.gov.uk">heather.rolls@edinburgh.gov.uk</a>