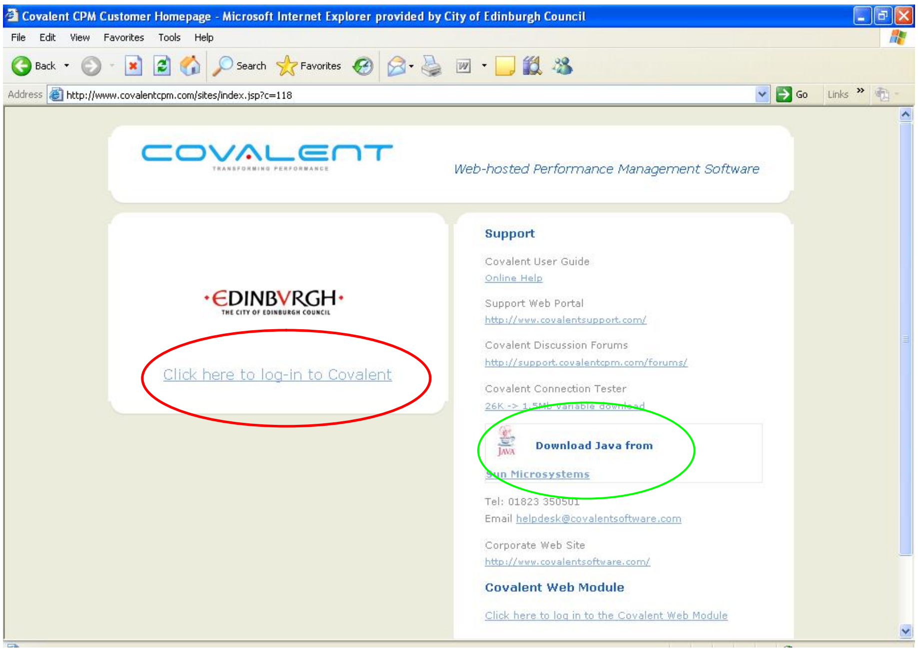
Guide for Voluntary Sector Users

Version 2: revised for 2009/10

Contents

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).

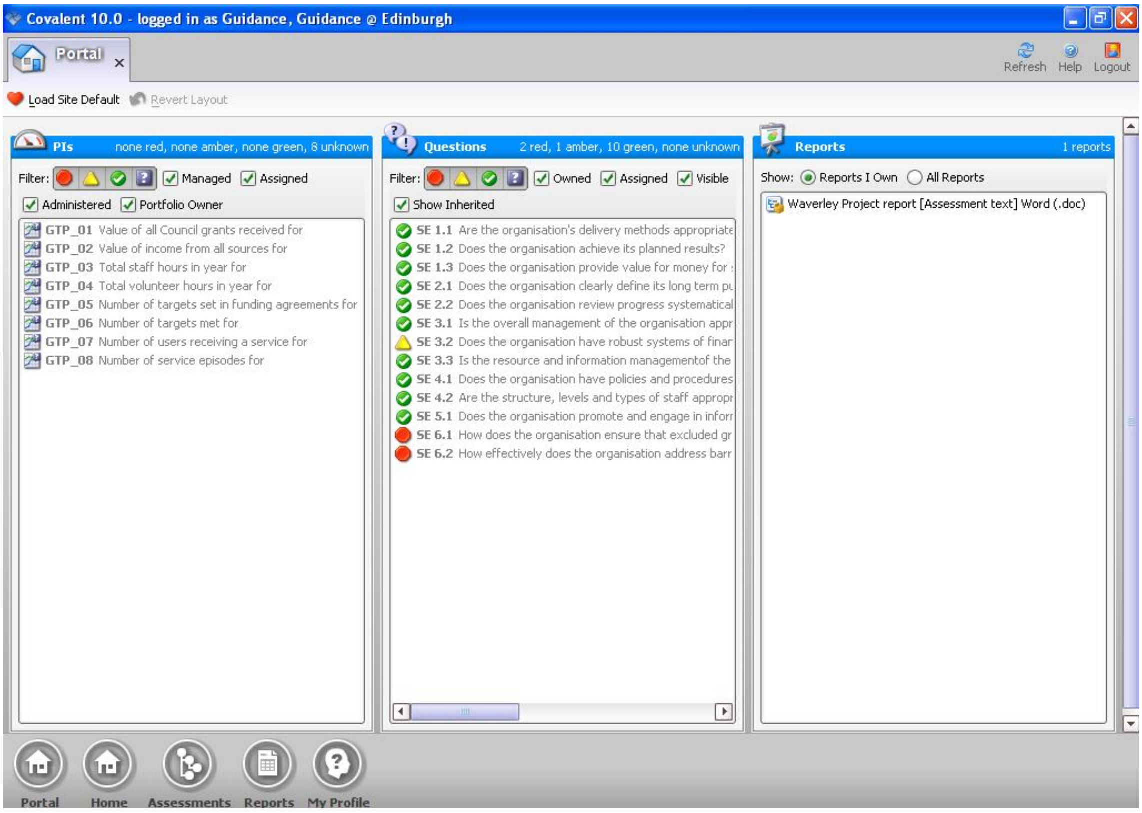
For users in last year's pilot

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

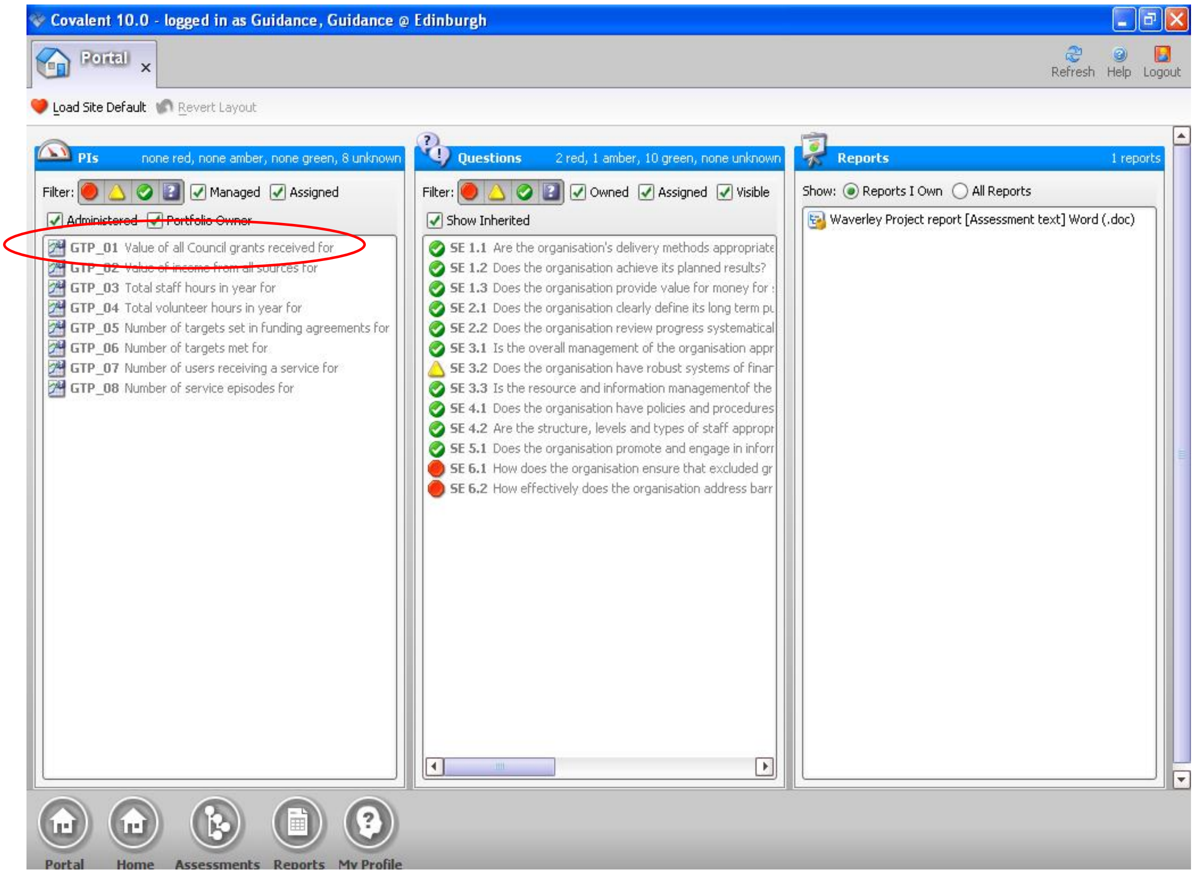
Enter your username and password on the homepage (your username should be in the following format ***firstnamesurname*** with no punctuation or capitals e.g. johnsmith). Your password is "covalent". When you click 'login' the system will automatically prompt you to change your password before proceeding any further.

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

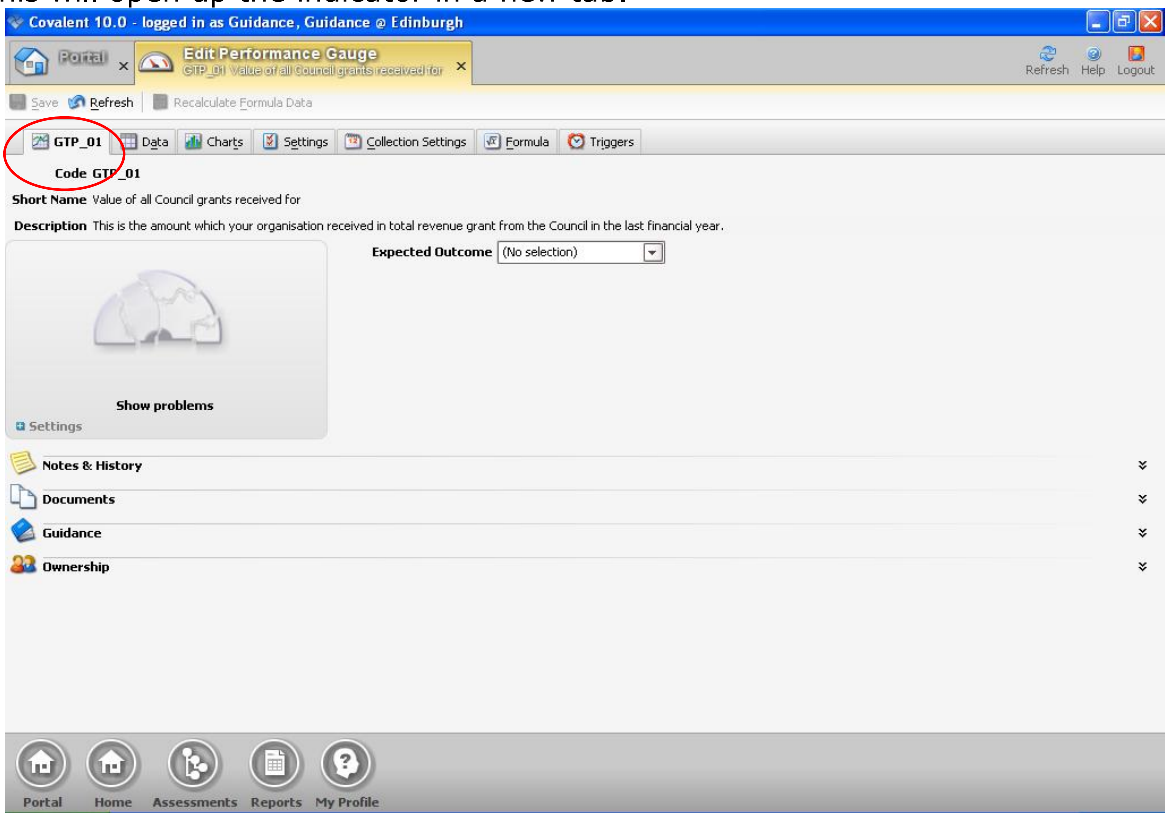


Entering Indicator Data

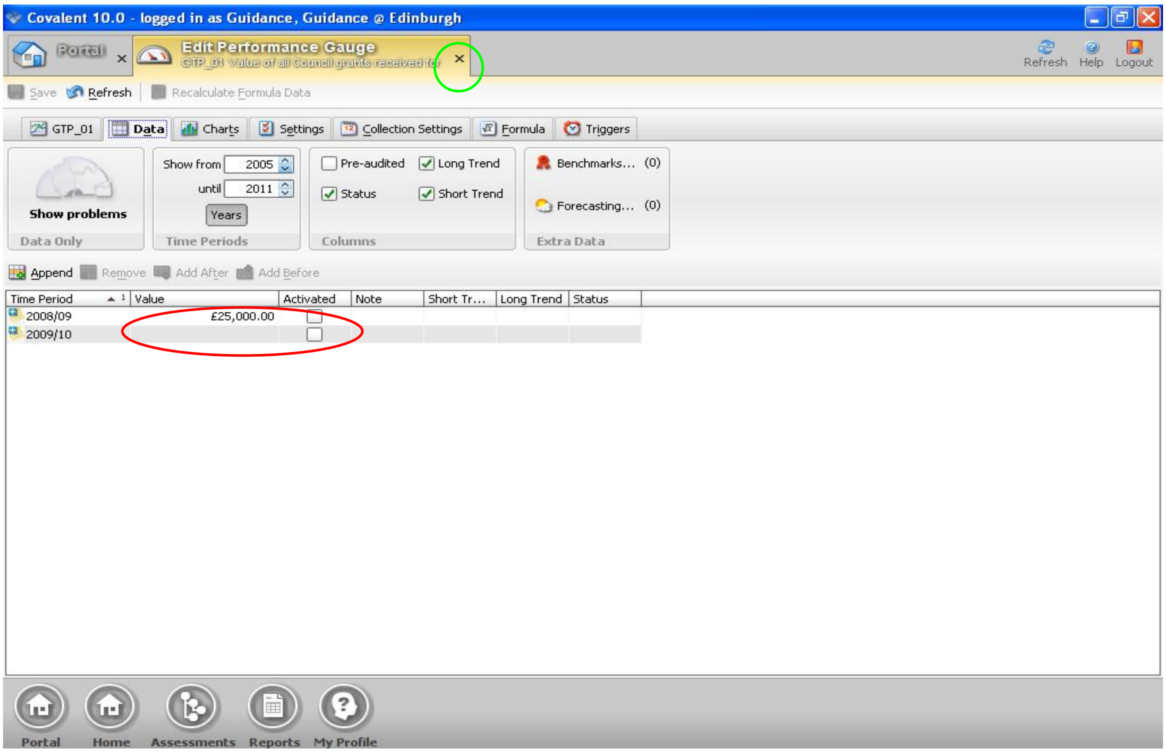
To enter data for an indicator, double click on the indicator you wish to update: This will open up the indicator in a new tab.



This will open up the indicator in a new tab.

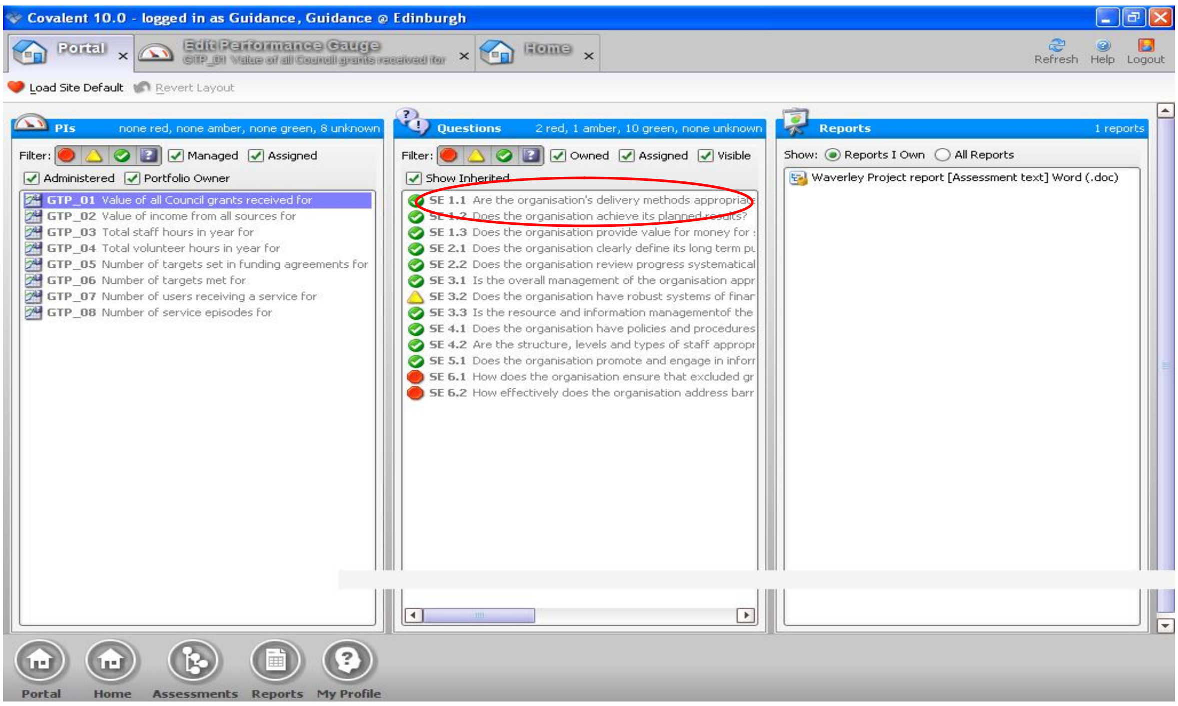


Click on the tab for Data, to view the screen below, where you should enter the data, tick the "activated" box and then the Save icon at the top left of the screen. Then close the tab headed "Edit Performance Gauge" by clicking the cross in the green circle and repeat this process for the remaining indicators.

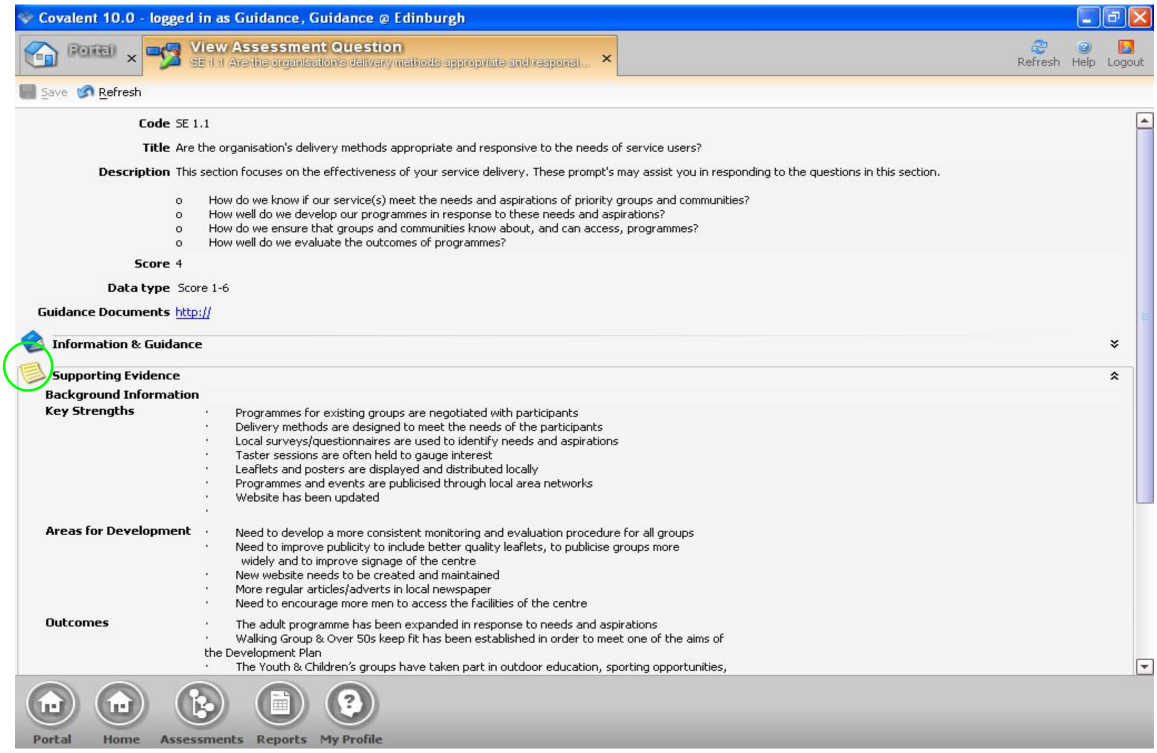


Entering QA data

To answer a question in the QA Assessment, double click on a question from the Portal:

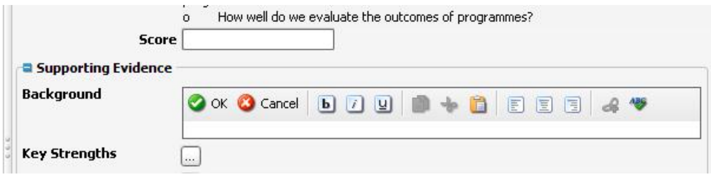


This will open the question as shown below. All information and scores entered last year will be copied to the assessment for 2009/10. This information should be edited to reflect any changes or service developments.

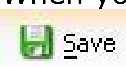


In order to expand the 'Support Evidence' section, click on the yellow note (circled in green above).

Clicking on the grey squares with three dots will open a box where you can enter or edit your evidence to the question set:



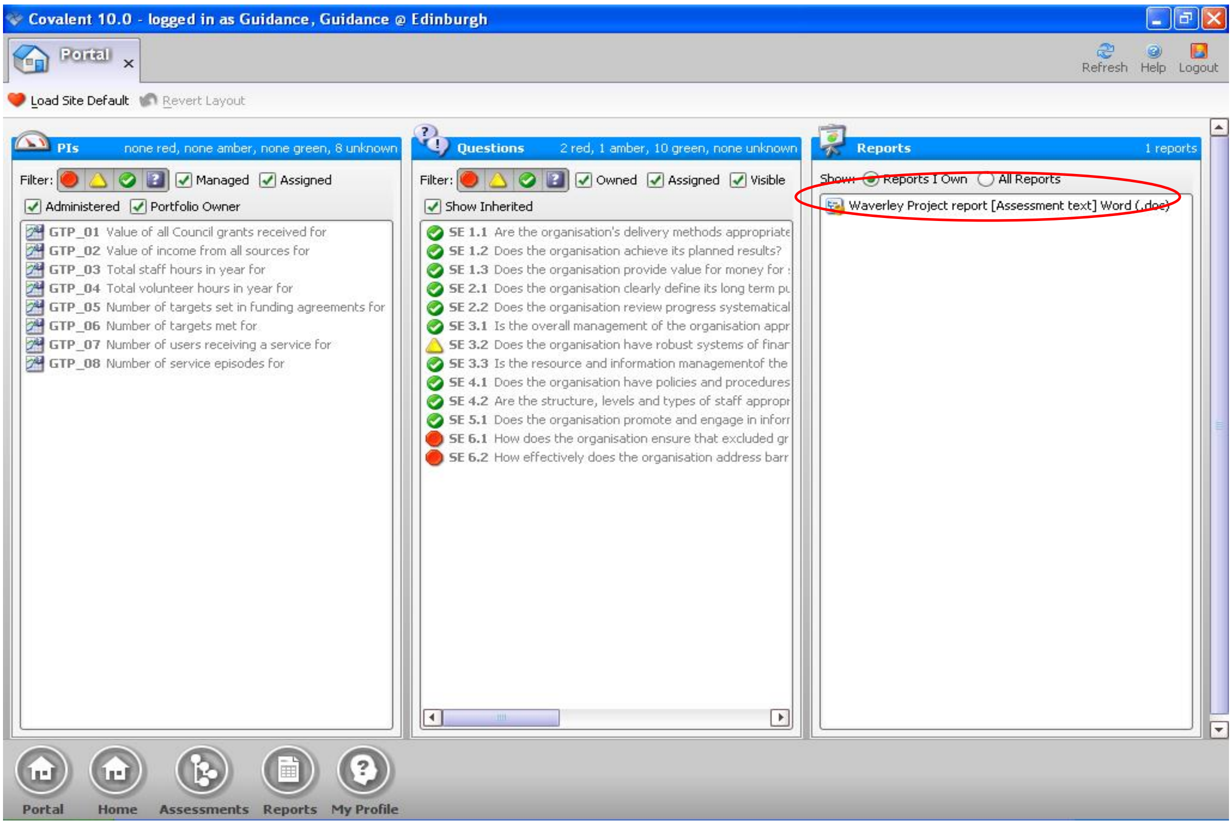
When you have completed your answer, click the 

icon and then the 

icon. **NB** It is not possible to edit the section scores form the portal, if you wish to revise this information you should follow the instructions in the "Navigation" section of the guide.

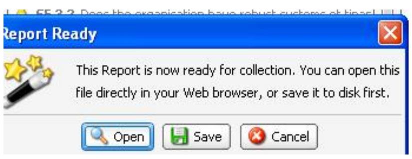
Running reports

From the Portal page double click the report you wish to run:



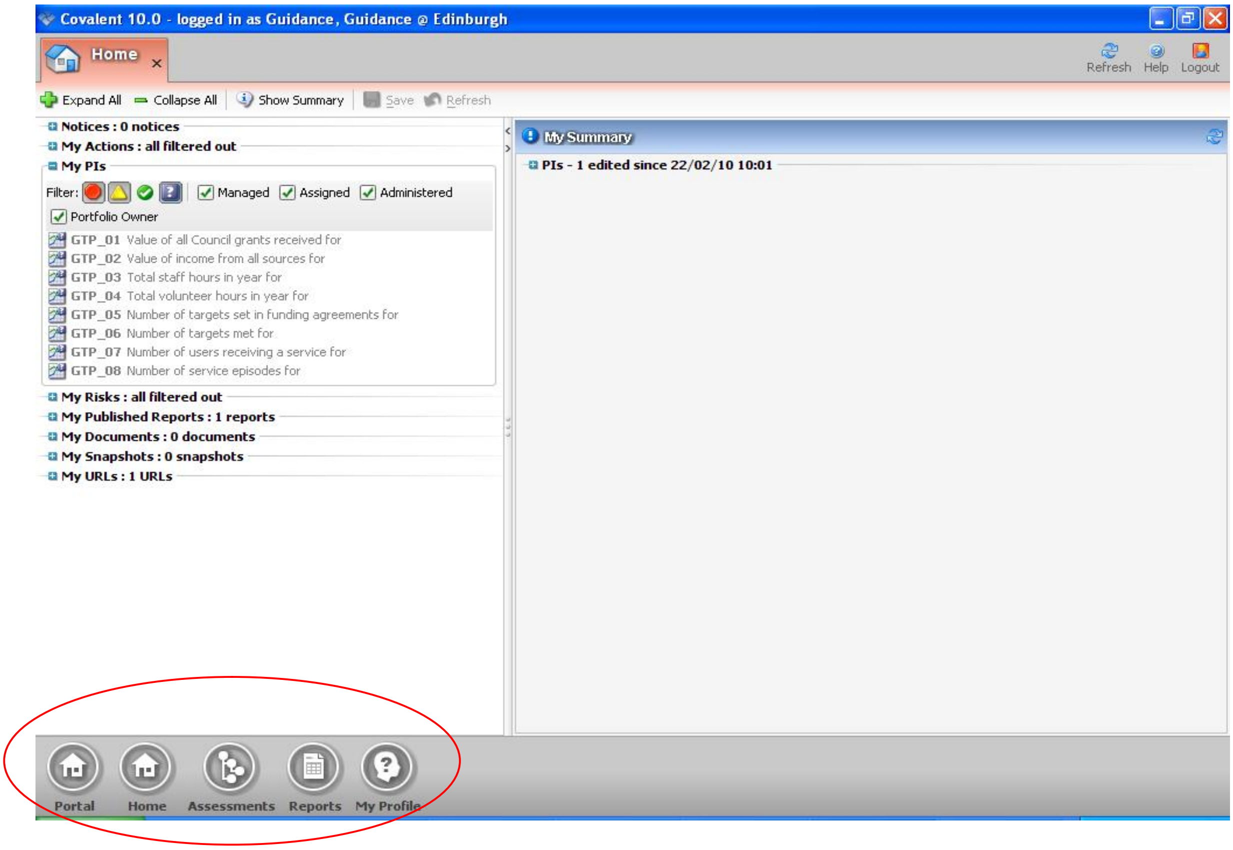
This will open the dialogue box below. Click on "Generate New Report"

You should then receive the dialogue box below. Click "Open", and the report can then be printed or saved.



System Navigation

NB The rest of this guide describes how to use Covalent if you prefer not to use the Portal. It is included for existing users or those who prefer not to access questions, indicators and reports through the Portal.



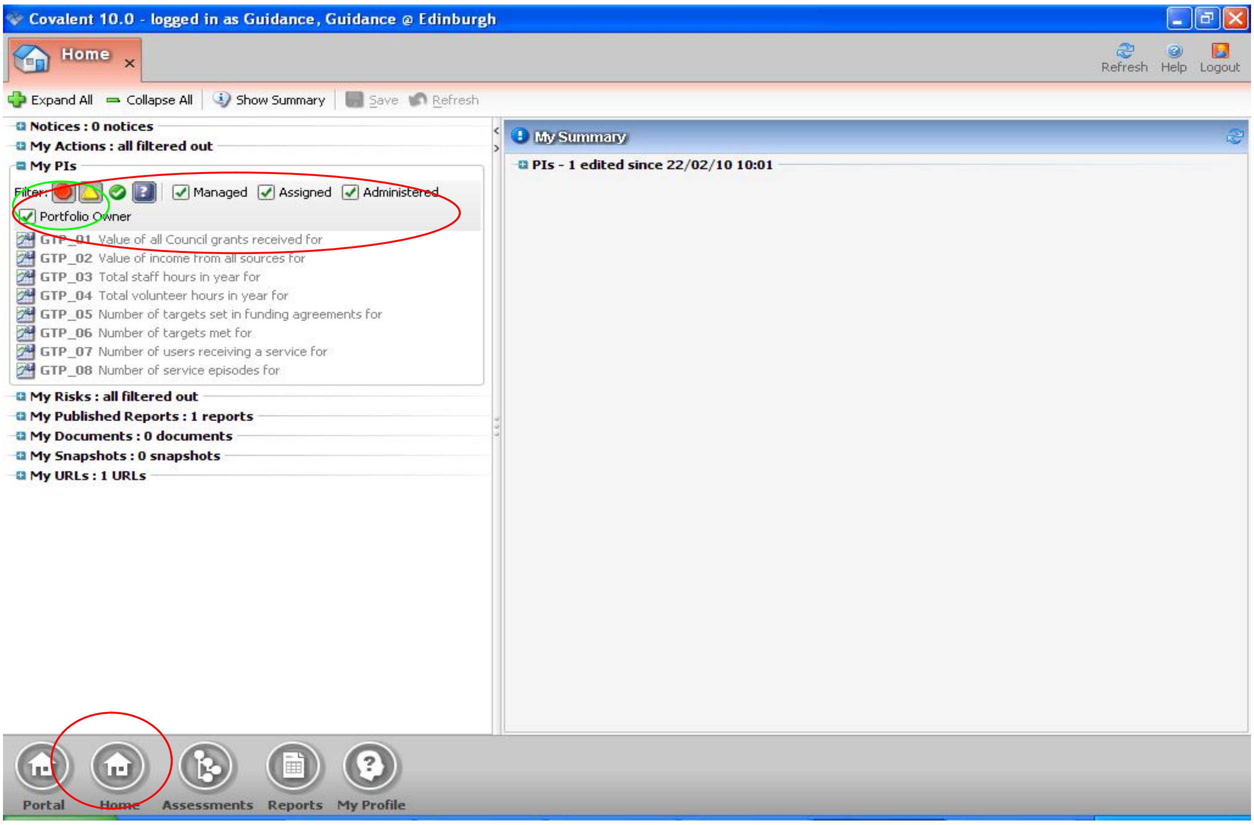
The five buttons at the bottom of the screen (circled in red) entitled Portal, Home, Assessments, Reports and My Profile allow you to enter performance indicator data, complete your Quality Assurance assessment and print a report with the data you've entered. Clicking on the assessment or report buttons 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. As described above, the Portal button allows you to access a page which contains the performance indicators, qualitative assessment section and the reports section.

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.

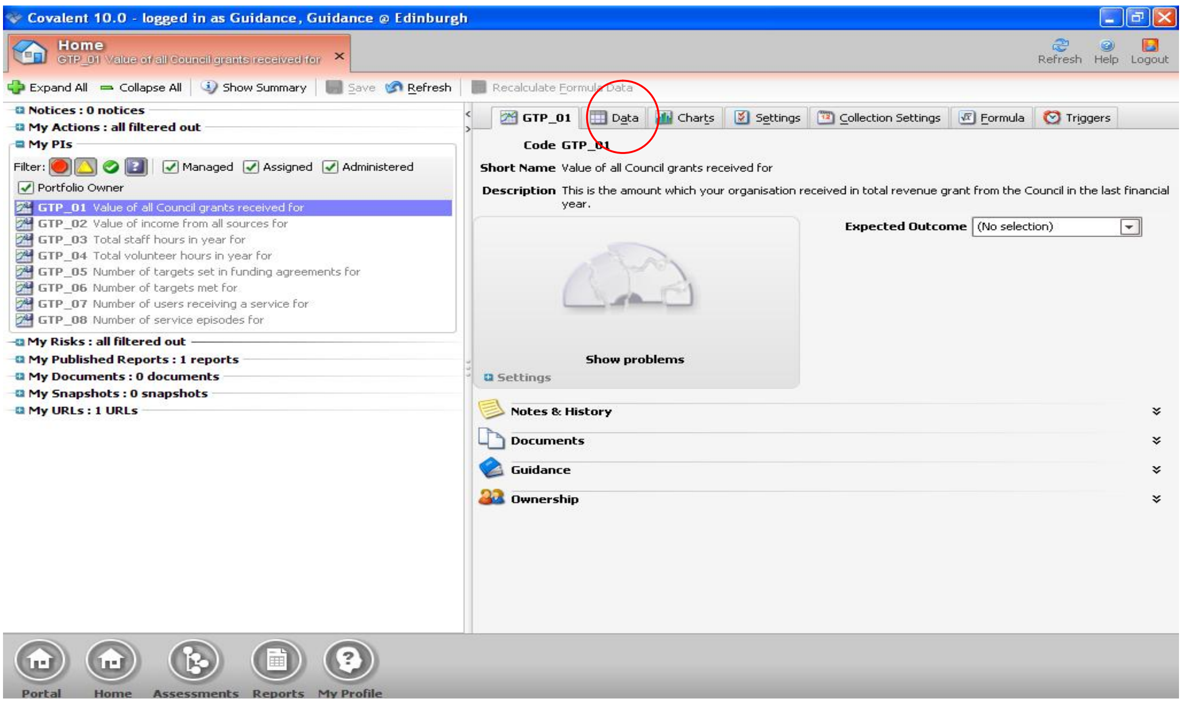
Once logged on to Covalent, your **Homepage** should be displayed (if this does not automatically appear, click on the **Home** button (circled in red) along the panel at the bottom of the screen). On the left hand panel of the screen, you should see all of the items that you have been assigned to.

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** in the red circle below. Do this by clicking on the red, amber, green symbols and the question mark icon which should have a grey background as shown below, and ticking the Managed, Assigned and Administered boxes shown.



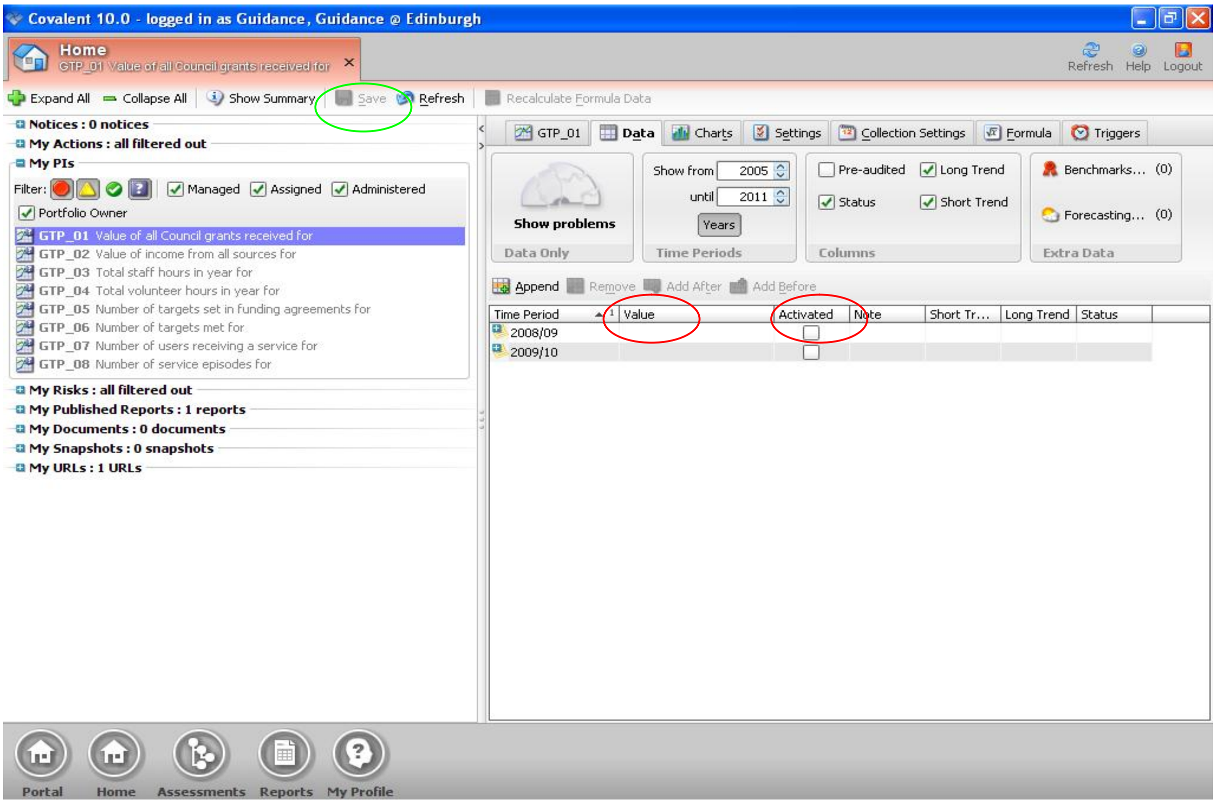
To Update a PI

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



To update a 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 2009/10. If you need to add a new row click on **Append.**



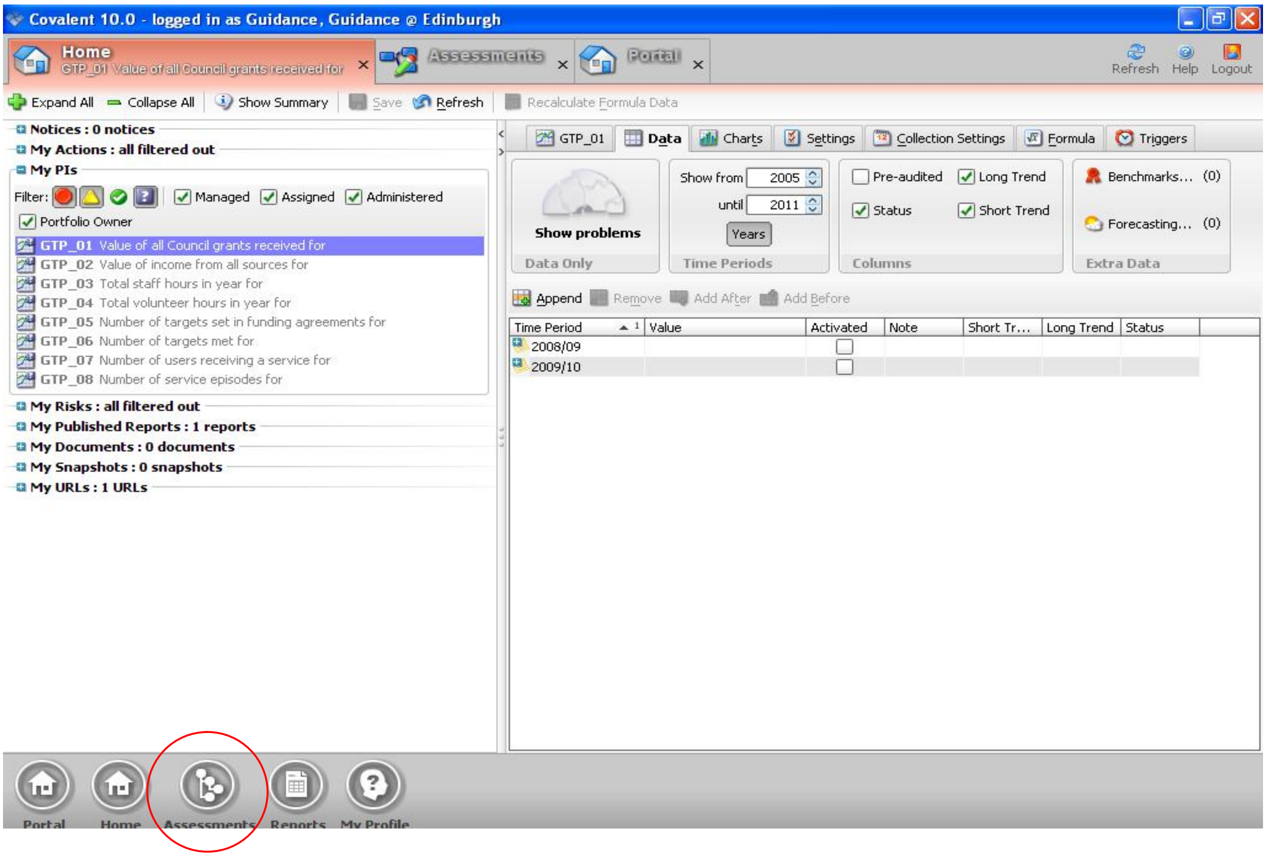
To add data simply click on the cell below the column headed "value" and type in the data. You do not need to use the £ sign as it will be entered for you. When the data has been entered tick the box below the column headed "Activated". Both the value and activated columns are circled in red in the chart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

You must then save your data by clicking on 

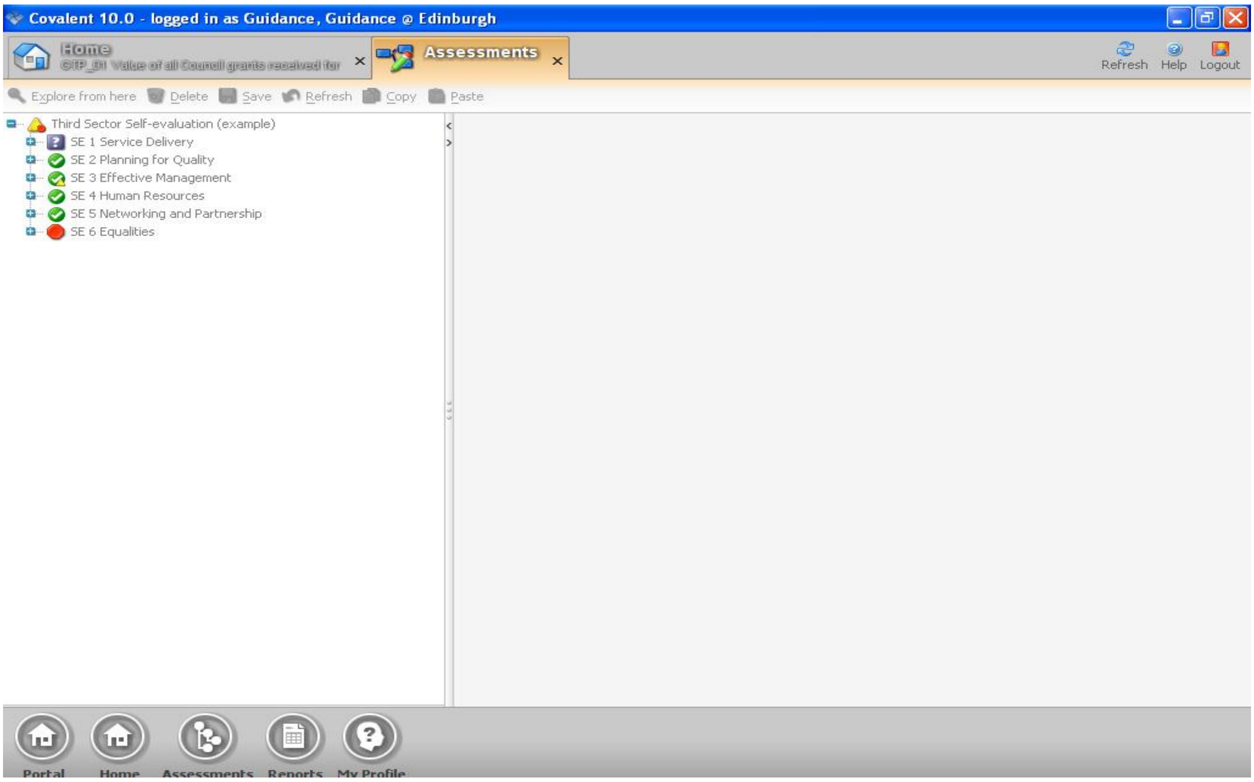
icon which is on the toolbar at the top of the screen and circled in green. Repeat these steps for the remaining seven indicators shown under the section "My PIs"

Entering QA Data

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

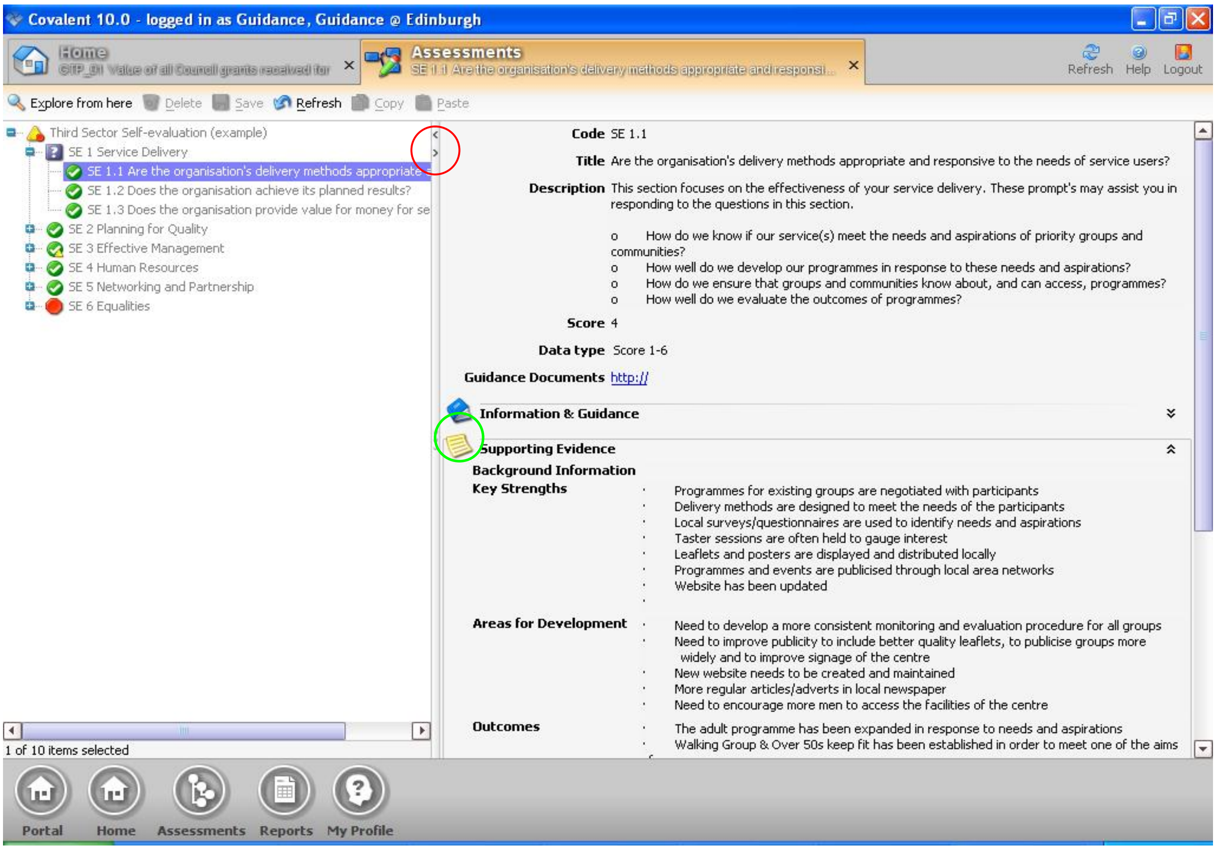


which will open up a new tab that looks like this:



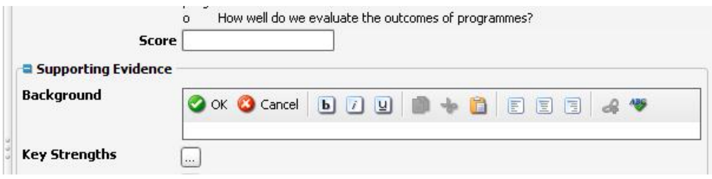
The assessments tab shows a completed assessment entitled "Third Sector Self-evaluation (example)". The other assessment is the one that you will complete.

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:



In order to expand the 'Support Evidence' section, click on the yellow note (circled in green above).

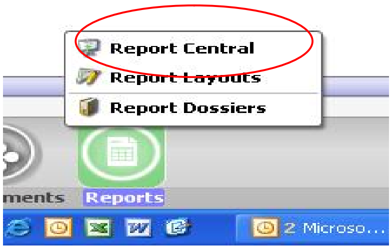
The screen is split vertically and can be adjusted either by dragging and dropping the partition or clicking the small arrowheads (circled in red above). Clicking on the grey squares with three dots will open a box where you can enter your evidence to the question set:



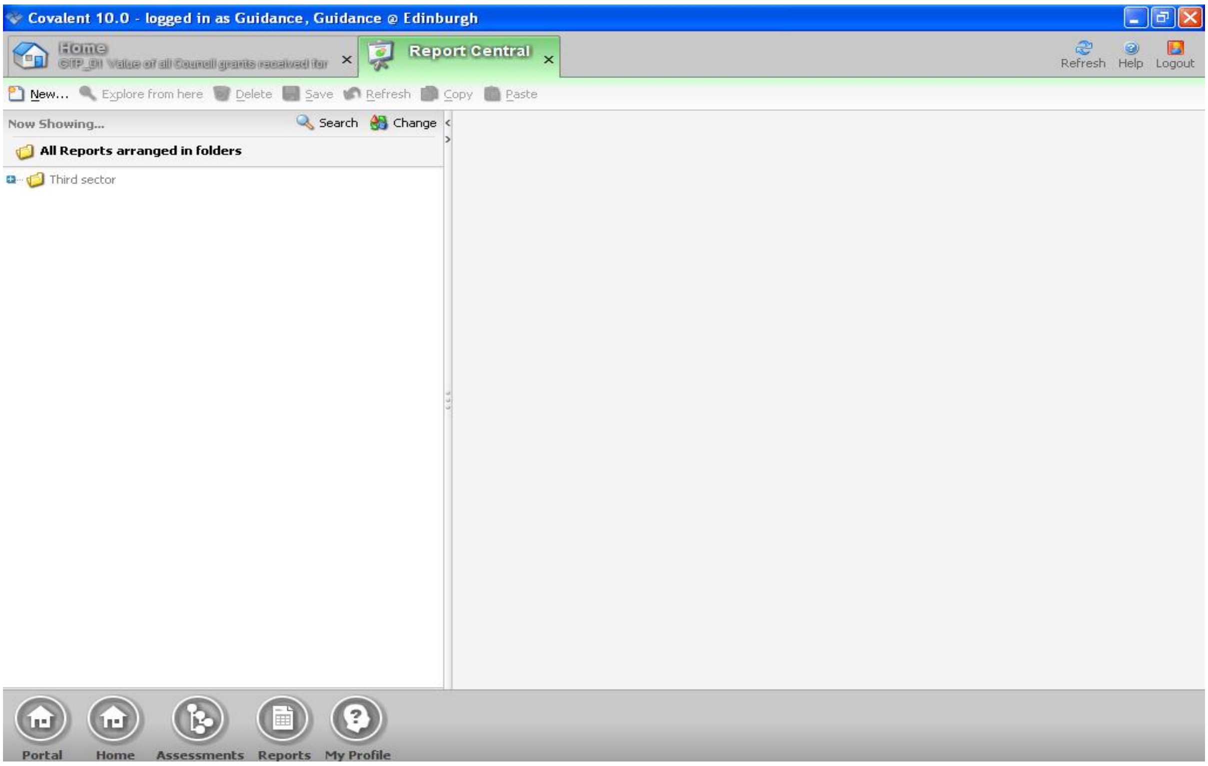
When you have completed your answer, click the  icon and then the  icon. Repeat this for the other questions in this section and then the other questions in section SE2 to SE6. Note that the section entitled Background is optional, however, replies are expected for Key Strengths, Areas for development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

Printing Reports

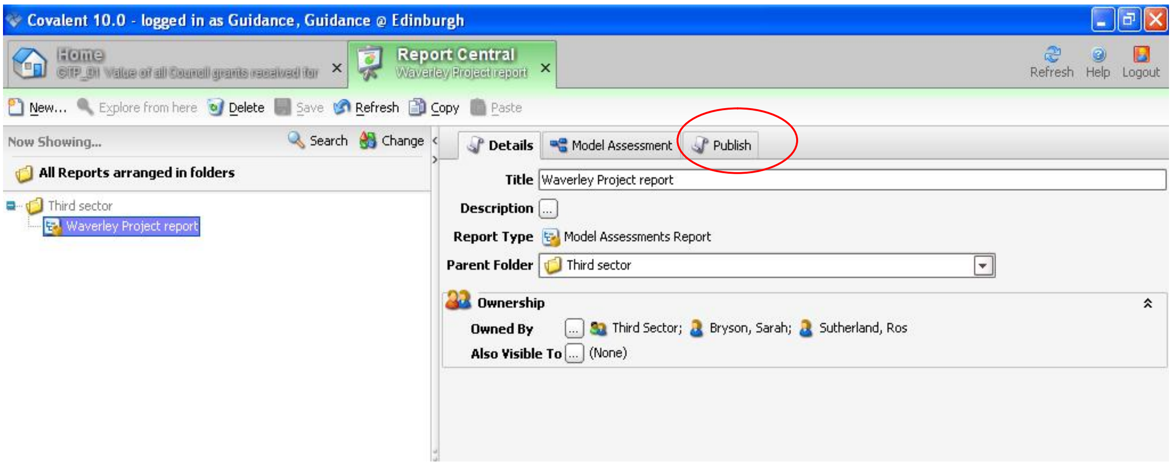
First, click on the Reports button and choose the top option of Report central



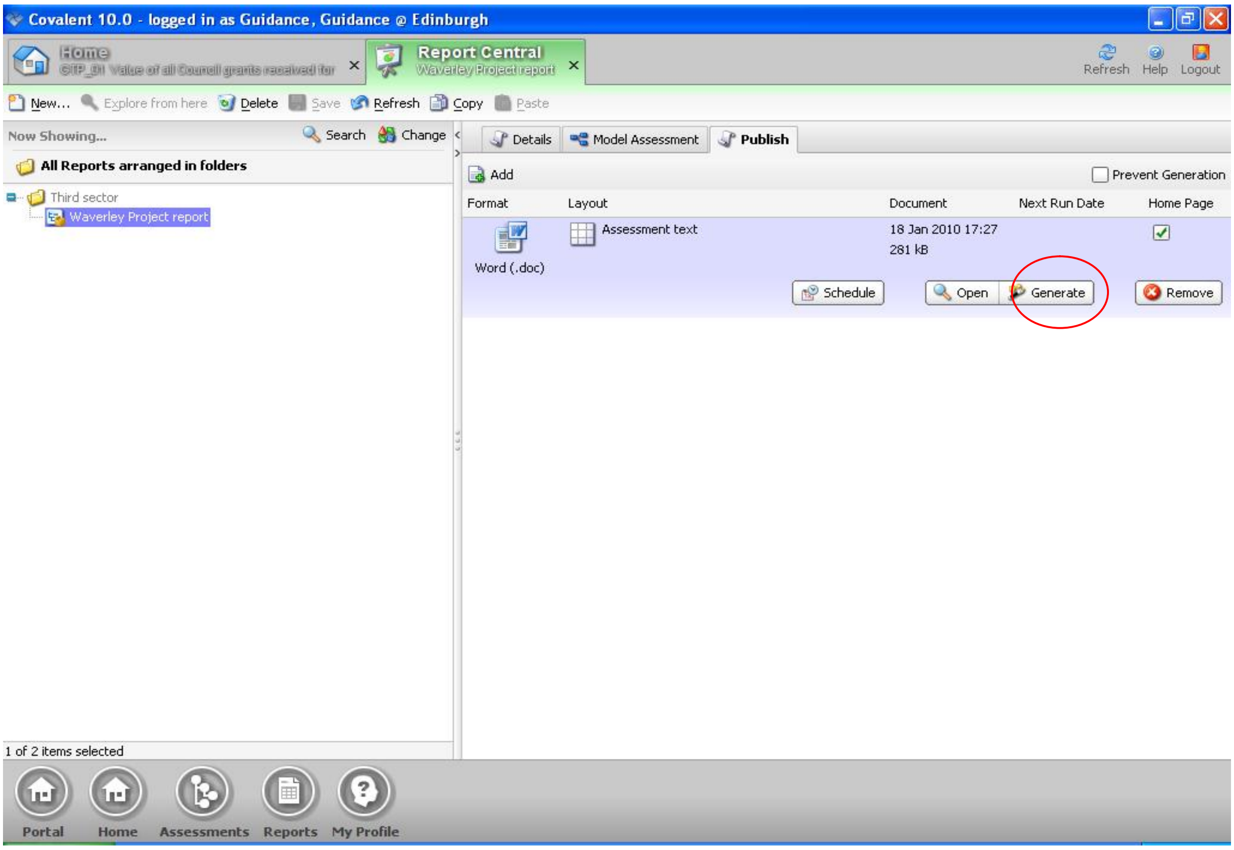
This will take you to a screen that looks like this:



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



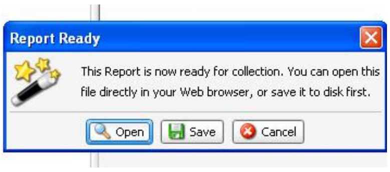
Now select the Publish tab (red circled above) and then click on the layout called Assessment text.



Next click on the 

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.

Logging off

When you're finished, click the white cross in the red box at the very top and right of the screen  and confirm that you wish to log off in the dialogue box.

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	mairi.cruickshank@edinburgh.gov.uk
Colin Hay	469 3975	colin.hay@edinburgh.gov.uk
Katie O’Donnell	469 3605	katie.o’donnell@edinburgh.gov.uk
Heather Rolls	469 3902	heather.rolls@edinburgh.gov.uk