Consultant database instruction

# Introduction

Thanks Sophia, Nigel, Echo for sharing their valuable in helping this project.

# Dashboard

# Workflows

## Import a new consultant

This section will illustrate how to import a raw resume to roaster, database, and dashboard. Four steps are required in order to import a new consultant, including to all roaster, database, and dashboard.

### Rename the resume file and upload it to *the* ***Resumes*** folder on [Google Drive](https://drive.google.com/open?id=1_4XVGrbtuz4uTKHgS21ka9UKCcnnzohY).

Resume should be named using the consultant full name with the initial letters of each word in upper case. For example, *SHAZIA KAZI – Resume-DS federal.docx* should be renamed as *Shazia Kazi.docx*

### Run python script ***Import New Resume to roaster.py***

### Check the updated data in roaster and run python script ***Update DB with roaster.py***

### Sync google roaster and database with your local versions

## Update an existed consultant’s info

Similar as importing a new consultant but simpler, updating an existed consultant info is a process only required the last two steps in importing a new consultant. Only two steps are involved.

### Modify the information on Roaster

# Appendix

## Appendix A: files summary

1. master roaster.xlsx
2. Consultants Database.xlsx
3. Dashboard – Desktop.twb
4. Import new resume to roaster.py (code)
5. Update database with roaster.py (code)

## Appendix B: keyword dictionary

### B1: words of choice

When manually modify consultants’ ***Expertise***, ***Certificate***, ***Federal Project***, and ***Target Population***, only certain words shall be used. It is possible to add new words into keyword dictionary when necessary. Please refer to [Appendix B2](#_B2:_modify_keyword) for further details.

Below is the keyword dictionary for the limited range of words can use:

***Expertise***

|  |  |
| --- | --- |
| **expertise** | **exp\_area** |
| Coaching & Training | Communication and Training |
| Federal government agency | Communication and Training |
| Meeting Facilitation | Communication and Training |
| Report Writing | Communication and Training |
| Budget and fiscal management | Domain Knowledge |
| Epidemiology | Domain Knowledge |
| Global health | Domain Knowledge |
| Healthcare policy and regulations | Domain Knowledge |
| Infectious Diseases | Domain Knowledge |
| International Relations | Domain Knowledge |
| Behavioral Science | Domain Knowledge |
| Mental Health | Domain Knowledge |
| Psychiatry | Domain Knowledge |
| Substance abuse | Domain Knowledge |
| Human Trafficking | Domain Knowledge |
| Nutrition/Food security | Domain Knowledge |
| Hepatitis C Virus (HCV) | Domain Knowledge |
| Program income reporting | Management |
| State Compliance Monitoring | Management |
| Capacity building | Management |
| Clinic Operations | Management |
| Financial analysis & management | Management |
| Fund development & Sustainability | Management |
| Grants management | Management |
| Human Capital Systems | Management |
| Human resources management | Management |
| Humility and Organizational Leaders | Management |
| Organizational Development&Transformation | Management |
| Quality improvement and management | Management |
| State Procurement System | Management |
| Strategic planning | Management |
| Auditing Federally-funded Grants Program | Management |
| Federal Acquisition Regulation (FAR) | Management |
| Nurse/Administration | Management |
| Data collection, analysis and reporting | Research and Evaluation |
| Family Planning and Reproductive Health | Research and Evaluation |
| Program evaluation & analysis | Research and Evaluation |
| Programmatic Assessment & Management | Research and Evaluation |
| Time-constrainted Financial Analysis | Research and Evaluation |

***Certificate***

|  |
| --- |
| Advanced Cardiovascular Life Support (ACLS) |
| American Academy of HIV Medicine Specialist (AAHIVS) |
| Association of Chartered Certified Accountants (ACCA) |
| Basic Life Support (BLS) |
| Cardiopulmonary Resuscitation (CPR) |
| Certified Coach, including BCC, PCC, MCC |
| Certified Grants Management Analyst (CGMS) |
| Certified Professional in Healthcare Quality (CPHQ) |
| Certified Professional In-Patient Safety (CPPS) |
| Certified Public Accountant (CPA) |
| Certified Registered Nurse Practitioner (CRNP) |
| Certified Valuation Analyst (CVA) |
| Chartered Global Management Accountant (CGMA) |
| DEA Certificate |
| Master Analyst in Financial Forensics (MAFF) |
| Physician Assistant (PA) from NCCPA |
| Project Management Professional (PMP) |
| Registered Nurse (RN) |
| Certified Fraud Examiner (CFE) |
| Licensed Physical Therapist |

***Federal Project***

|  |
| --- |
| Global Trade Analysis Project (GTAP) |
| Health Centers (BPHC) |
| HIV/AIDS Domestic (HAB Ryan White) |
| HIV/AIDS International (HAB PEPFAR) |
| Maternal and Child Heath (MCHB, ACF) |
| Maternal, Infant, and Early Childhood Home Visiting Program (MIECHV) |
| Population Assessment of Tobacco and Health Study (PATH) |
| Rural Health (FORHP) |
| The Joint United Nations Programme on HIV/AIDS (UNAIDS) |
| Nursing Education Partnership Initiative (NEPI) |
| Head Start |
| Early Head Start (EHS) |
| Community Services Block Grant (CSBG) |
| The HIV/AIDS Bureau (HAB) |
| Environmental Protection Agency (EPA) |
| General Services Administration (GSA) |
| Department of Energy (DOE) |
| Government Accountability Office (GAO) |
| Statement of Budgetary Resources (SBR) |
| Enterprise Resource Programs (ERP) |
| Strengthening Accountabilityin the Glocal Economy (SAGE) Fund |
| Head Start Enterprise System |
| Temporary Assistance for Needy Families (TANF) |
| Community Health Center (CHC) |
| Federal Highway programs |
| Corporation for National and Community Service (CNCS) |
| Uniform Guidance (2 CFR Part 200) |
| Uniform Guidance (45 CFR Part 75) |
| Deep Foundations Institute (DFI) |
| OMB A-133 Compliance Supplement |
| Linking Actions for Unmet Needs in Children’s Health (LAUNCH) |
| Parents as Teachers (PAT) |
| Race to the Top |
| Home Instruction for Parents of Preschool Youngsters (HIPPY) |
| Healthy Families America (HFA) |
| Nurse-Family Partnership (NFP) |
| Evidence-based Early Childhood Home Visiting |
| Center on the Social and Emotional Foundations for Early Learning (CSEFEL) |
| Healthy Start Initiative |
| Home Visiting Collaborative Improvement and Innovation Network (HV CoIIN) |

***Target Population***

|  |
| --- |
| Early Childhood |
| Elderly population |
| Orphans |
| Malaria |
| Female population |
| HIV/AIDS population |
| Homeless population |
| Infants |
| LGBTQ |
| Low-income |
| Maternal and Children |
| People with disability |
| Rural Health |
| Tribal Home Visiting |
| Youth |

### B2: modify keyword dictionary

If new word needs to be added to the keyword dictionary

## Appendix C: database structure

s