Consultant database instruction

# Introduction

Thanks Sophia, Nigel, Echo for their great help in this project. This project aims to build a centralized database for consultants whom DS Federal has worked or is currently working with. In addition to the database, the project provides pipeline to import new consultant or modify existed consultant’s information without manually update the data. Further, a dashboard summarizing all the consultants’ data is provided for visualization.

The entire system was deployed on Google Drive and any DS Federal employees can ask for authorization for access.

# Dashboard

Dashboards may need to be reconnected to the database when first opened. Both dashboards, external and internal, are based on ***Roster & Database -> Consultants Database***.

## Internal dashboard

There are three major interfaces in internal dashboard: *Consultant Selection*, *Selected Consultants List*, *Skill Profile*.

### Consultant Selection

It is the main and first interface when open the dashboard.

### Selected Consultants List

It shows which consultants you have added to your buckets. If want to add consultant to the selected list, go to *Consultant Selection* interface, right click consultant’s name and click ‘add to set *Selected Consultant*’; If want to remove consultant from the selected list, go to *Consultant Selection* interface, right click consultant’s name and click ‘remove from the set *Selected Consultant*’.

### Skill Profile

When clicking the LinkedIn icon attached to each consultant’s profile, it will direct to consultant’s LinkedIn or another informative website introducing consultant while his or her LinkedIn is not available (e.g. id = 64, Morenike Bello). However, it is possible that no website link is available, in which case LinkedIn icon will not link to any website.

## Miscellaneous

1. In both external and internal dashboard, map serves as an important filter. Hence, it is important to have consultant’s geographic information while importing a new consultant. Make sure the location data is valid to be presented by dashboard.

# Workflows

## Import a new consultant

This section will illustrate how to import a raw resume to roster, database, and dashboard. Three steps are required in order to import a new consultant.

### Upload Resume

C:\Users\JINGLI~1\AppData\Local\Temp\1565892521(1).pngC:\Users\JINGLI~1\AppData\Local\Temp\1565892669(1).pngThe current workflow only supports .docx file. If the resume is in .pdf or .doc file, save it as .docx before moving on. Rename the resume file and upload it to your local ***Resumes*** folder. Resume should be named using the consultant full name with the initial letters of each word in upper case. For example, should be renamed as

### C:\Users\JINGLI~1\AppData\Local\Temp\1565895321(1).pngImport new resume to Roster

Go to ***Codes***, double click and wait until you see the following sentence in pumped window (around 1min): type the consultant full name and hit *enter*. The input needs to be the same words you used to name the resume file.

C:\Users\JINGLI~1\AppData\Local\Temp\WeChat Files\daf2893427732ced33d9a8018f1618b.png

### Check the updated data in roster and Update database

After successfully import new consultant to roster, open ***Roster & Database -> master roster***. New consultant information will be added to the bottom of Excel, check the information and edit until satisfied.

C:\Users\JINGLI~1\AppData\Local\Temp\1565907776(1).pngWhen satisfied with the information in roster, close the Excel file and double click

## Update an existed consultant’s info

Updating an existed consultant info is similar as importing a new consultant but simpler. Only two steps are involved.

### Modify the information on Roster

Open ***Roster & Database -> master roster*** and modify the information as needed. Remember the consultant’s id whose profile you make changes.

### C:\Users\JINGLI~1\AppData\Local\Temp\1565907776(1).pngUpdate database with modified Roster

When satisfied with the information in roster, close the Excel file and double click Different from importing a new consultant’s procedure, now that all consultants have existed in the database, the computer will ask you which consultant you want to update.



Input consultant id that you remember in the previous step and then hit *enter*.

# Appendix

## Appendix A: files summary

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

## Appendix B: keyword dictionary

### B1: words of choice

When modify consultants’ ***Expertise***, ***Certificate***, ***Federal Project***, and ***Target Population***, only certain words are allowed. This is for summarization purpose. Otherwise, ‘report writing’ and ‘Report Writing’ will be treated as two kinds of expertise, which is not desired. However, it is possible to add new words into keyword dictionary. Please refer to [Appendix B2](#_B2:_modify_keyword) for further details.

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

***Expertise* (**use the words under **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-constrained 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 Accountability in the Global 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 words need to be added to the keyword dictionary or existed words need to be updated, go to ***Roster & Database -> Consultant Database***. If updating expertise keywords, go to ***Expertise\_LOV*** tab and make changes as you want. If updating other categories’ keywords, go to ***Keyword*** tab and change the keywords there.

## Appendix C: database structure

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## Appendix D: libraries involved

**pyinstaller**: converting .py to .exe (<https://www.youtube.com/watch?v=lOIJIk_maO4>)

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