

AKDN Monitoring, Evaluation and Research Consultant Database

Manual for AKDN Users of the Consultant Database

Version 1.0 – July 2016

1. Purpose of this Manual

The purpose of the AKDN Monitoring, Evaluation and Research (MER) Consultant Database is to have a single, easy-to-use, database of individuals who are interested in working as MER consultants for AKDN agencies worldwide. The main strengths of this database are threefold:

- Consultants' professional and contact information is kept up-to-date through their networking profiles and sites (e.g. LinkedIn, personal website/blog);
- Consultants are allowed to register in the database only if they are invited by an AKDN staff member; and
- If a consultant is selected through the database, basic information on the consultancy is recorded and kept for reference. This feature gives AKDN staff members the opportunity to consult a colleague and request further information about a particular consultant's work.


This Manual contains information on the following:







- A description of the structure and organisation of the Consultant Database;
- Instructions on how to search for consultants in the Database;
- Instructions on how to add/invite consultants to the Database;
- Information on how to register the project for which a consultant has been hired.

2. Structure and Organisation of the Consultant Database

Once you log in, you will see that the Consultant Database has three main parts: 1) a blue **Menu Bar** across the top of the screen; 2) a blue box labelled **Search for a Consultant** just below the Menu Bar, and 3) a box at the bottom of the screen which displays the **Consultant Search Results**. The default Consultant Search Results shows a list of all of the consultants who have registered with the database (and which will be filtered based on your search criteria). Each of these three sections will be described in more detail below.

Menu Bar

AKDN MER Consultant Database Invite a Consultant Registered Consultancies  Welcome Karanja ▾	
AKDN MER Consultant Database	Provides access to the full database and a list of all registered consultants. Clicking on this link will reset any of the filters you have made and will return you to the home screen.
Invite a Consultant	Clicking on this link will generate a pop-up form which will allow you to invite an MER consultant to join the database. Please enter the consultant's name and email address and select the thematic area(s) in which the consultants are

	specialists (optional). Once you have entered this information and clicked Invite , the consultant will receive an invitation to register with the database. More information on inviting a consultant will be contained in Section 3 below.
Registered Consultancies	<p>The list of Registered Consultancies displays the consultancies that have been recorded by AKDN staff members in this database. Registering a consultancy in the database does not replace any formal contracting mechanism in your agency or department. It is an important function of the database as it gives AKDN users the opportunity to see the kinds of projects a particular consultant has undertaken. Thus, AKDN staff members who are interested in knowing more about the quality or timeliness of a particular consultant's work can contact the individual(s) who had contracted that consultant previously.</p> <p>The list of registered consultancies shows the following information about the projects that have been recorded in the database: the consultant's surname and first/given name(s), the title of the consulting project, the name of the AKDN staff member who served as the contact person for the consulting project (and his/her email address) and the start and end date for the consulting project.</p> <p>You can sort the list of registered consultancies by clicking on the double arrows () located next to a column. Once you do so, the double arrows will sort that field in alphabetic order (). Clicking on that icon again will sort the column in reverse alphabetic order, and the icon will change again ().</p> <p>If you are the AKDN staff member who registered a consultancy, you have the ability to edit the data you have entered about that consultancy previously. To do so, click on the Edit button () in the Action column. You can also delete the consultancy that you have registered by clicking on the Delete button (). Once you click on the Delete button, you will receive a pop-up message asking if you are sure you would like to delete the project. Deleting a consultancy from the list removes it permanently from the database.</p>
 Welcome Username	<p>This section gives access to a drop-down menu where the user can access the user manual, change his/her password and logout from the database.</p> <ul style="list-style-type: none"> • User Manual Clicking on the 'User Manual' opens a .pdf document in a new tab on your browser. This manual has been designed to guide the AKDN user through the system, showing how to interact and work with the AKDN MER Consultant Database. • Change Password Clicking on the 'Change Password' will generate a pop-up form which will allow you to change your user password. You will have to enter your current password, your new password, confirm the new password and click the 'Update' button to complete the process. • Logout Clicking on the 'Logout' button will immediately log you out of the Consultant Database and return you to the Login screen.

Search for a Consultant

Search for a consultant (by one or more more of the following criteria)

Consultant's Name

First/Given name, last name or full name

Thematic Area(s)

Choose area(s) of expertise

International Experience

Country(ies) where the consultant has previously worked

Last Consultancy Within

Last Consultancy Within

Language(s) *

Choose the language(s) you are looking for

Skill(s)

Choose the skill(s) you are looking for

Consultant Type

Consultant Type

* Returns results for any level of proficiency or ability area

Q Search

Reset

The five fields contained in the 'Search for a consultant' window allow AKDN staff members to search the database for MER consultants that meet a specific criterion or criteria. Once you have selected the criterion or criteria on which you would like to filter, click on the **Search** button ([Q Search](#)). As with any database, you may need to modify the search criteria in order to find the appropriate short-list of consultants. To return to the master list of consultants, click on the **Reset** button ([Reset](#)).

Consultant's Name	If you are looking for a particular consultant, enter all or part of a consultant's name (first/given name or surname).
Language(s)	If you are looking for a consultant with particular language skills, select a language which you would like your consultant to know. Note that language ability areas (speaking, reading, writing, and understanding) and skill levels (beginner, intermediate, fluent, and mother tongue) are all self-reported by the consultant. Searches for a language will return consultants who have reported having any knowledge level of that language in any ability area. If you are interested in finding more about the self-reported ability areas and skill levels for a particular consultant, check the consultant's profile.
Thematic Area(s)	If you are looking for a consultant who specialises in a particular thematic area, select the relevant area or areas of interest from the drop-down menu.
Skill(s)	If you are looking for particular skill or skills, select the relevant ones from the drop-down menu.
International Experience	If you are looking for a consultant with experience in a particular country or geography, select the country or countries from the list.


Consultant Type	There are three different types of consultants based on an affiliation status – Independent Consultant, Institution-affiliated and Both Independent and Institution-affiliated. You can select the type of consultant you are looking for from the list.
Last Consultancy Within	If you are looking for a consultant who has been used by someone in the Network within a certain time-frame, select the preferred time from the list (1 year, 3 years or 5 years).

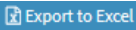
Consultant Search Results

Consultant Search Results

Export To Excel

	Surname	First/Given Name(s)	Primary Email	LinkedIn Profile	Website / Blog	Resume / CV	Previous Consultancies	Invited By	Action
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If you use a specific criterion or criteria to search for a consultant, the search results will give you a list of consultants that meet those criteria. If no filters are selected in the ‘Search for a Consultant’ window, the search results in this window will default to the entire list of consultants in the database. Search results that are displayed can be sorted according to the consultant’s surname and first/given name(s). This window also displays other information about the selected consultants, such as whether or not the consultant provided a LinkedIn link, Website/Blog or CV/resume. Under ‘Previous Consultancies’ you will be able to see if the consultant has previously worked with AKDN staff. Please note that the database does not contain historical information on consultants’ work with AKDN but rather the projects for which the consultants have been selected through the Consultant Database (noted under ‘Previous Consultancies’). Under ‘Invited By’ you will find the name of the AKDN staff who invited the consultant to join the database. If you would like to see more information on a particular consultant (languages, skills, thematic areas, international experience and professional history), you can click on the magnifying glass () in order to see the consultant’s full profile.

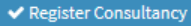

On the top right hand corner of the Consultant Search Results box you will find an Export to Excel button () which allows you to export the list of consultants, who have met your search criteria, into an Excel document.



3. How to Invite a Consultant to Join the Database

When you log into the Database, you will see the **Invite a Consultant** tab in the Menu Bar. Click on this tab and a pop-up box will appear. You will need to provide the consultant’s name, his/her email address, and also the consultant’s fields of expertise, under thematic area or areas (optional). Once you complete this information and click on ‘Invite’ button, an email will be sent to the consultant informing him/her that an AKDN staff member has invited them to join the database. The email sent to the consultant will contain a unique URL which will guide the consultant through a registration process.

4. How to Register a Consultancy

After you have hired a consultant for a particular project, it is important that you register his or her consultancy in the database. Collecting basic information on consultancies is an important feature of the database. Going forward, this will give other AKDN staff the opportunity to see the kinds of projects a particular consultant has undertaken. In addition, AKDN staff members who are interested in knowing more about the quality or timeliness of a particular consultant's work can contact the individual(s) who had contracted that consultant previously. Please note that registering consultancies in the database does not replace any formal contracting mechanism in your agency or department.

In order to register a consultancy, click on the **Register Consultancy** button () in the right-hand column. Once you click on that button, a pop-up box will appear in which you can enter the title of the consultancy project, the duration of the project (start date and end date), the AKDN contact, and the AKDN contact's email address. The AKDN contact you provide should be the AKDN staff member who either manages the consultancy or the individual who will work most closely with the consultant. The reason for this is that, in the future, other AKDN staff members who are interested in knowing more about the quality or timeliness of a particular consultant's work can email the AKDN contact. Once you are finished entering this information, click on the **Register** button at the bottom of the pop-up window. The pop-up window should then disappear. If you refresh your browser window, the new consultancy you just registered will be listed in the database. If this is the first consultancy you have registered for a particular consultant, a light blue **View** button () will appear in the Previous Consultancies column. Clicking on this will reveal the details about that project.

If you are the AKDN staff member who registered a consultancy, you have the ability to edit the data you have entered about that consultancy (for example, change the duration of the consultancy or update AKDN contacts' information). To do this, click on the Edit button () in the Action column. You can also delete the consultancy that you have registered by clicking on the Delete button (). Once you click on the Delete button, you will receive a pop-up message asking if you are sure you would like to delete the project. Deleting a consultancy from the list removes it permanently from the database.

Should you experience any problems working with any section of the database that are not discussed in this guide, please contact consultants@akdn.org.