United Nations Individual Consultants Management System (UNICMS)

UNICMS is an online database driven website that will capture detailed information relating to individual consultants who wish to interact with United Nations agencies in a professional capacity. This website will allow consultants to create, modify and manage their business profiles, as well as allow them to apply for contracts/projects being offered by UN agencies. Consultants will have access to their detailed profile, and may see general public information on all other Consultants.

PRIORITY

1. Consultant Management

Capturing the information relating to Consultants is the initial focus of the project. We need to have this section up and running. We need to have a consultant successfully enter all their information and to manage that information by editing and keeping the information up to date. So the Consultant part of the system is first priority.

2. Projects Management

The next "phase" of the system once the Consultant Management is working is to create an integrated projects management system. This will be a system where UN agencies can post projects or service requirements on the system and then have a notification sent out to all those consultants that are listed as being under that Category or Sub-Category. The consultants would then be able to "Bid" on the projects.

3. System Management

System management, while critical to the whole system and maybe required to be developed simultaneously with Consultant Management, is expected to take care of the overall management of consultant profiles, system security, who sees what and who can do what.

The following pages provide screenshots of how I expect the system should look and the data that should be captured. I will also try to explain logics behind the process.

MAIN PAGE

The main page will be the starting point for the website, it will have a brief notation on the purpose of the site and the ability for the visitor to **Sign Up** or **Login**. They can also click on the system name (**UNICMS**) in order to return to the home page, there is also a **Contact** link to show contact information for the local UNDP office.

The example in Figure 1, shows a **menu system at the top**, this we will refer

Figure 1 - Home Page

to as the header. This will show additional menu options once the visitor logs in. Based on who logs in the menu options will vary. There is also a footer, that currently only has copyright information, but should be able to display whatever we need to.
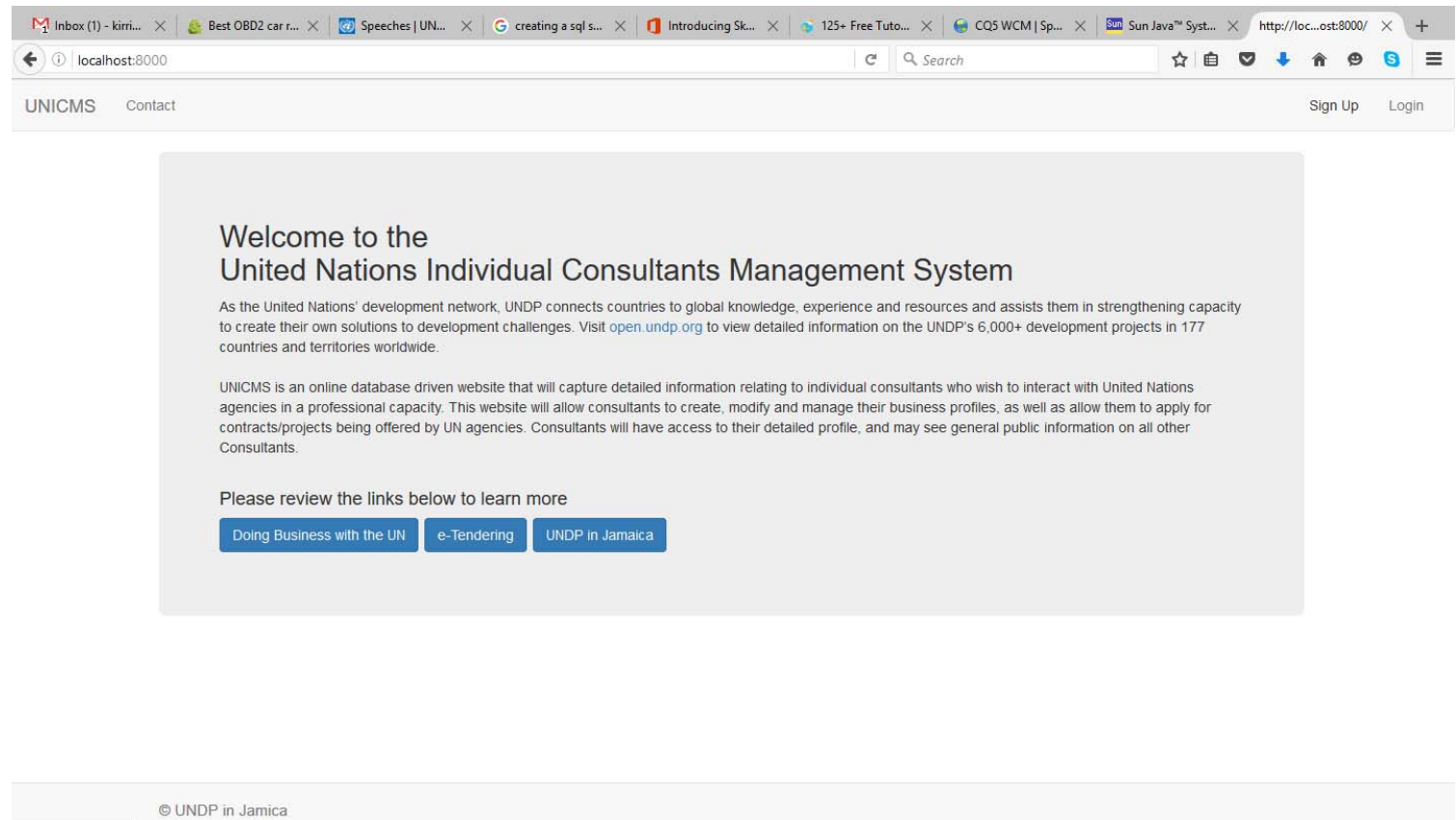
SIGN UP

For new consultants, the sign up page should capture most of their initial information. This initial information is presented in Figure 2 and should also for the basis of the required fields for the consultant table. Once registration is completed, then the consultant will be presented with a confirmation screen (Figure 3) and an e-mail sent to the e-mail address provided. All new sign up MUST be verified BEFORE becoming active. So it would be good if an e-mail could also be sent to the administrators of the system.
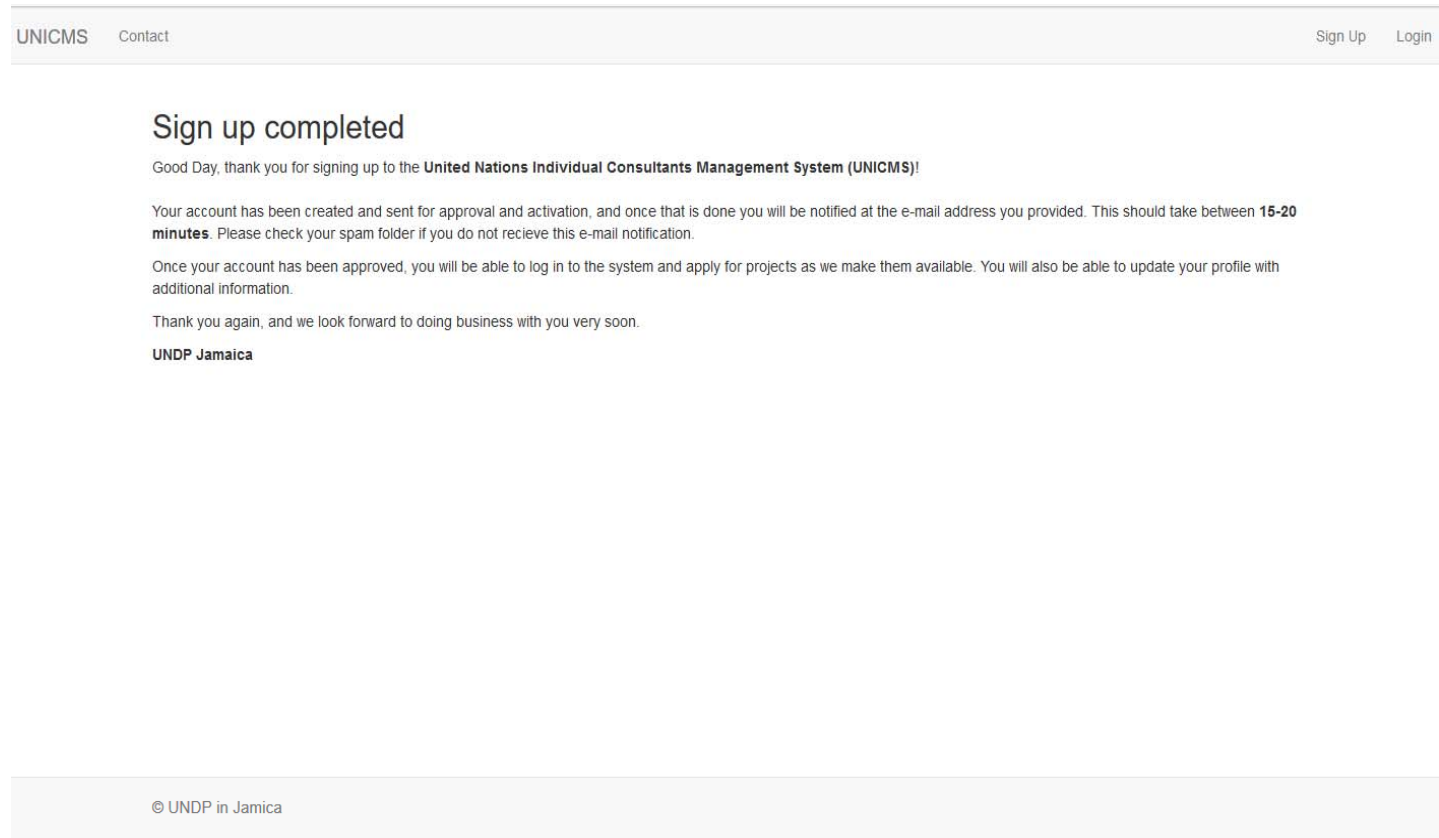

Figure 2. Sign-Up Page

Figure 3. Successful Sign-Up

CONSULTANT LOGIN

After successfully signing up and having their account activated, when a consultant logs in they will be presented with two additional menu items, **Consultants** and **Projects**, as well as changing the Login prompt to the name of the logged in consultant, with a drop-down menu to have them Logout. I would also like to know if it is possible to take them directly to their profile if it is their very first time

logging into the system. Figure 4, shows the menu options when a consultant logs in. Please note that the menu items are activated to give an example of what is expected under each option, but the menu options would not be activated until selected.
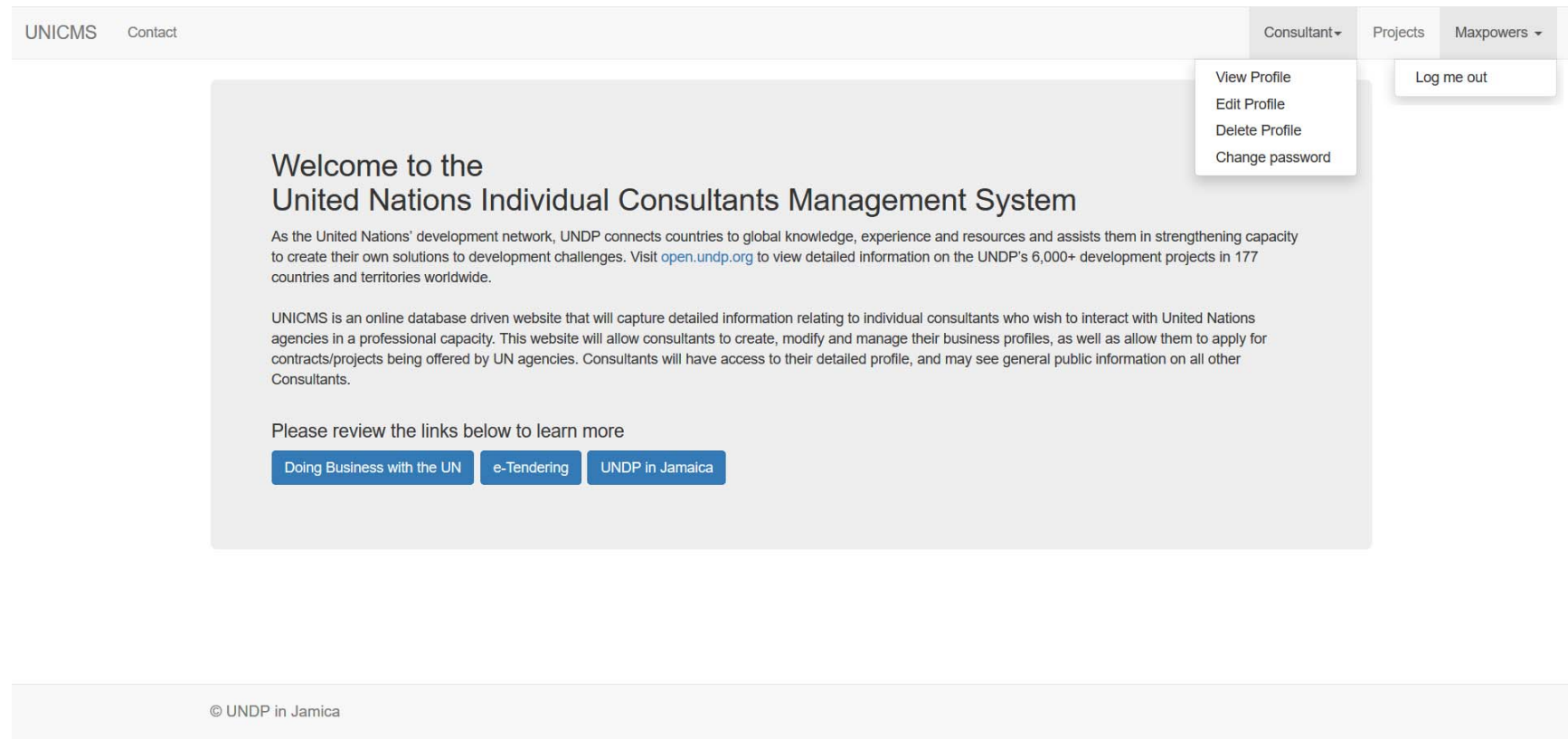

Figure 4. Consultant logged in with menus activated

CONSULTANT – PROFILE VIEW – PROFILE DETAILS

When the consultant selects the View Profile menu option they will be presented with the full profile page, with the initial view showing all the relevant consultant information entered during sign-up as shown in Figure 5 as the profile details page. This page will be displayed with menu options at the side of the page that are all specific to the consultants' profile. The following screenshots will show each menu option and what is expected from each option.

As you can see from Figure 5, all the information initially entered is displayed immediately for the consultant to see. I was thinking that
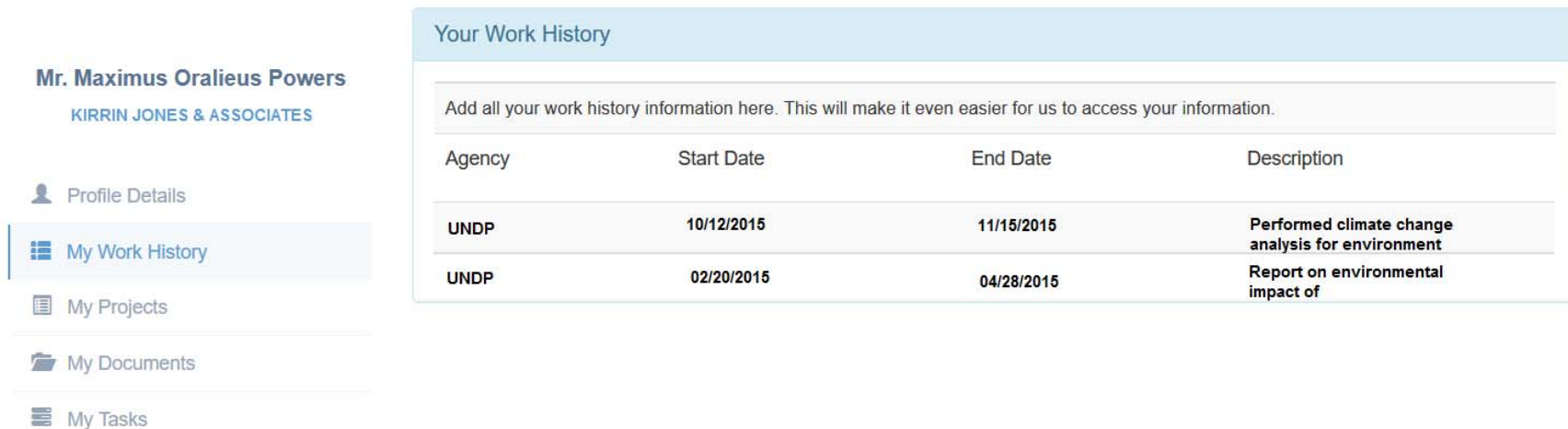

Figure 5. Profile View - Profile Details

the consultant's rating can also be placed somewhere on this page. You may also notice that there is a **mail** icon allowing the consultant to gain access to the mailing feature to send an e-mail to UNDP (we will build that out later), an **edit** and **delete** icon. I would like the "delete" option to deactivate and hide the consultant's profile from the system (except for super user designates). However, it should be included in the system checks for uniqueness when a username is being created. If the username is not unique and there are other matching information (e.g. e-mail, telephone) then the system should prompt and recommend reactivation OR create a unique name

(we can discuss further what happens and how). It would also be good if Consultants could register themselves under multiple categories and sub-categories, but no more than 5.

CONSULTANT – PROFILE VIEW – MY WORK HISTORY

The Work History page (Figure 6.) is expected to list in a tabular form all activities that this consultant has undertaken with UN agencies. The page should show the **AGENCY**, **START DATE**, **END DATE** and a **DESCRIPTION** of the work. On this page there should be an option to ADD new work information. There should then be icons beside each row of information that allows for the row to be deleted or to view more information, as the DESCRIPTION column will only present about 30 or so words from the full details. Viewing the details, will allow the consultant to edit the information and then save. Figure 6 shows an example.

Mr. Maximus Oralieus Powers
KIRRIN JONES & ASSOCIATES

- Profile Details
- My Work History
- My Projects
- My Documents
- My Tasks

Your Work History

Add all your work history information here. This will make it even easier for us to access your information.

Agency	Start Date	End Date	Description
UNDP	10/12/2015	11/15/2015	Performed climate change analysis for environment
UNDP	02/20/2015	04/28/2015	Report on environmental impact of

Figure 6. Consultant Work History

The form to fill in work history should be a simply form that captures UN AGENCY (this should be a drop down with a prepopulated list), START and END dates, DESCRIPTION of project (this should be a memo field), CONTACT PERSON NAME and E-MAIL (at the agency).

CONSULTANT – PROFILE VIEW – MY PROJECTS

Now the My Projects page works in conjunctions with the PROJECTS system (discussed later). On this page it will list all the projects that the consultant has applied for through the system. So when they go to the PROJECTS section of the website and "bid" on a project, then

Mr. Maximus Oralieus Powers

KIRRIN JONES & ASSOCIATES

- 👤 Profile Details
- ☰ My Work History
- ▦ My Projects
- 📂 My Documents
- ☰ My Tasks

Your Projects

From this page you can see all the projects that you have made a bid on. If you have submitted all the required documents, then the status of the project will be completed otherwise it will be pending.

Project Name	Date Bid	Deadline	Status

Figure 7. Projects Consultant subscribes to

once they have completed the "bidding" process, it will be displayed on this page for them to know and keep track of what they are part of. This page will show basic information and provide a link to the project and the information required. They should also be able to cancel projects from this page by deleting a project.

CONSULTANT – PROFILE VIEW – MY DOCUMENTS

Allows the consultant to upload relevant documents for applying for bids. This section should just allow the consultant to be able to upload documents to the system as well as delete them. When the option to upload is selected, then the user can enter a description and type. Figure 8 shows an example of the page.
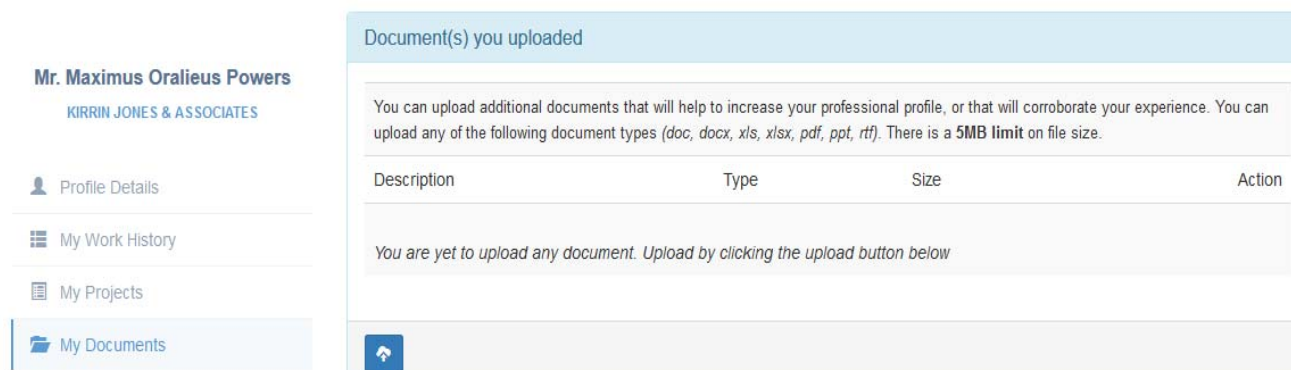

Figure 8. Document listing

CONSULTANT – PROFILE VIEW – MY TASKS

I have not fully formulated the My Tasks feature yet. We can see how we use this once the project gets going.

PROJECTS

The Projects section is for UN agencies to be able to post job adverts or service requests and then have a notification automatically sent out to consultants who have signed up and listed themselves under matching categories. When projects are displayed (Figure 9) they should display the NAME OF THE PROJECT, SUMMARY, CATEGORY(IES), SUBCATEGORY(IES), DEADLINE, DURATION, AGENCY, and STATUS (whether the project is active or inactive). The Project list should also be able to be sorted by STATUS or CATEGORY. However, when the projects are initially displayed, they should be sorted by the most recent at the top.

When a consultant selects a project, they will be presented with the full information entered by the AGENCY for that project. That will include the full description of the project, listing all documents that would have been uploaded with the project, etc. There would

then be a button labelled "Bid" which the consultant would click to begin the process of interacting with this Project (WORKING ON THIS).

Figure 9. Project Listing

SYSTEM MANAGEMENT

This section provides overall management of the system. When a user account is created and designated "staff" then that user will be provided with additional menu options as shown in Figure 10. "Staff" are accounts that are created by the systems administrator and should have the fields for USERNAME, FIRST NAME, LAST NAME, AGENCY, SUPERUSER, ISSTAFF, EMAIL ADDRESS, ACTIVE. There should be a separate table for staff.

This will allow "staff" to be able to SEARCH through the consultants, add PROJECTS, generate REPORTS, MANAGE consultant's profile. This means they will be able to add notations to the consultant as it relates to their performance, and be able to give them a grading. The ADMIN menu will only be displayed for users who are designated SUPER USER.
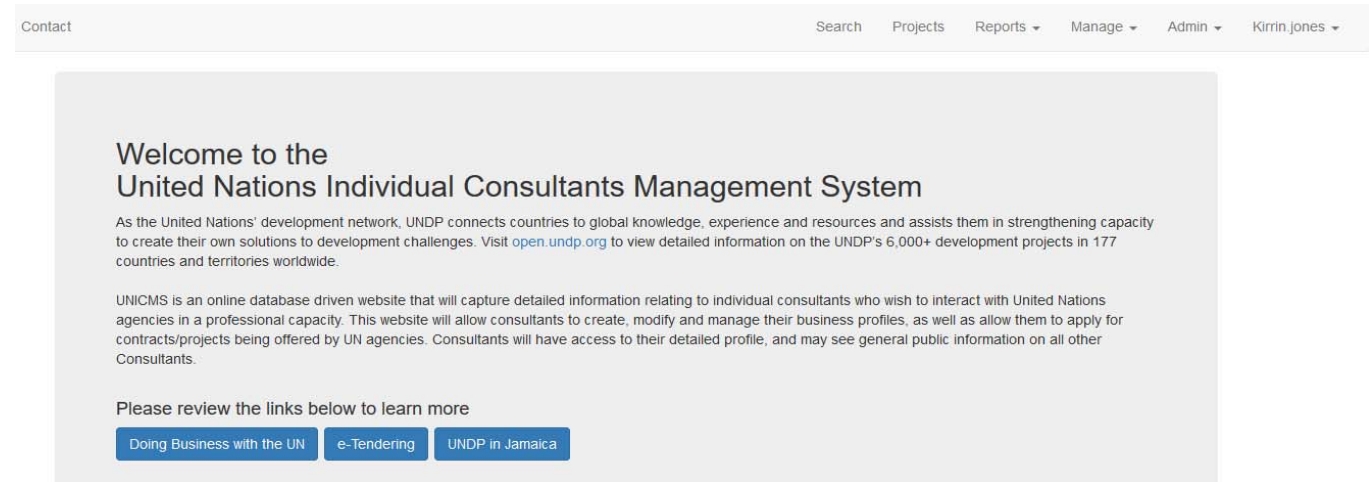

Figure 10. Management Menu Options

SYSTEM MANAGEMENT – MENU OPTIONS

The following are some of the possible menu options and system functions.

As the system progresses we should be either adding or subtracting, not sure.

SYSTEM MANAGEMENT – SEARCH

The search option should allow "staff" members to be able to view a list of consultants. They should be able to enter any name (first or last or part of a name), category or sub category, or location. From
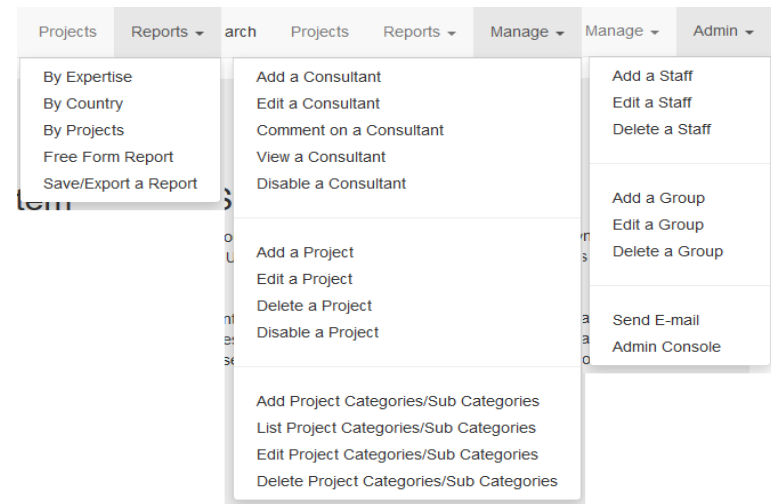
Figure 11. Systems Menu Options

the resulting list they should be able to access the profile of the consultant. Figure 12 shows an example but can be setup any other way.

Figure 12. Consultant Search page

SYSTEM MANAGEMENT – MANAGE – NEW PROJECT CATEGORY/SUB-CATEGORY

This is for the purpose of adding new categories and subcategories. From here staff will be able to view all the categories and subcategories in one go, as well as add, delete or modify. Figure 13 shows a possible layout, however you are welcome to present it whichever way you thing is best, so long all subcategories can be seen for their respective categories. The table below lists the current categories/sub-categories so that you will have something to work with. Note that every area of the system that requires the category/sub-category listing must all be from a drop-down that will be populated from the table.

CATEGORY	SUB-CATEGORY
Administrative & Logistics	Secretarial Duties Administrative Assistant
Climate Change	
Conflict Resolution & Mediation	Counsellor
Development Planning	
Disaster Risk Reduction	
Energy	
Environment Management	
Events Planning & Management	
Financial Services	Accounting Auditing Services Bursar
Gender	
Governance	
HIV/AIDS	
Hospitality	Catering Services Accommodations Conference Facilities
Human Resource Management	
Information Technology	Computer Repairs Computer Manufacturer Programming Website Development
Monitoring & Evaluation	Evaluation Consultants Review Strategic Documents
Policy Development	
Poverty & Economy	

Figure 13. Categories/Sub-categories

Project Management	Project Manager	
Psychometric & Psychological Evaluation		
Rapporteur		
Resource Mobilization		
Retreat Facilitator		
Security & Justice		
Sustainable Development		
Telecommunications	Cellular Service Internet Service Provider	
Training & Staff Development		
Translation & Linguistics		
Transportation & Logistics	Drivers Car or Bus Rental	