

CONSULTANTS MANAGEMENT EXPRESS

Features Guide

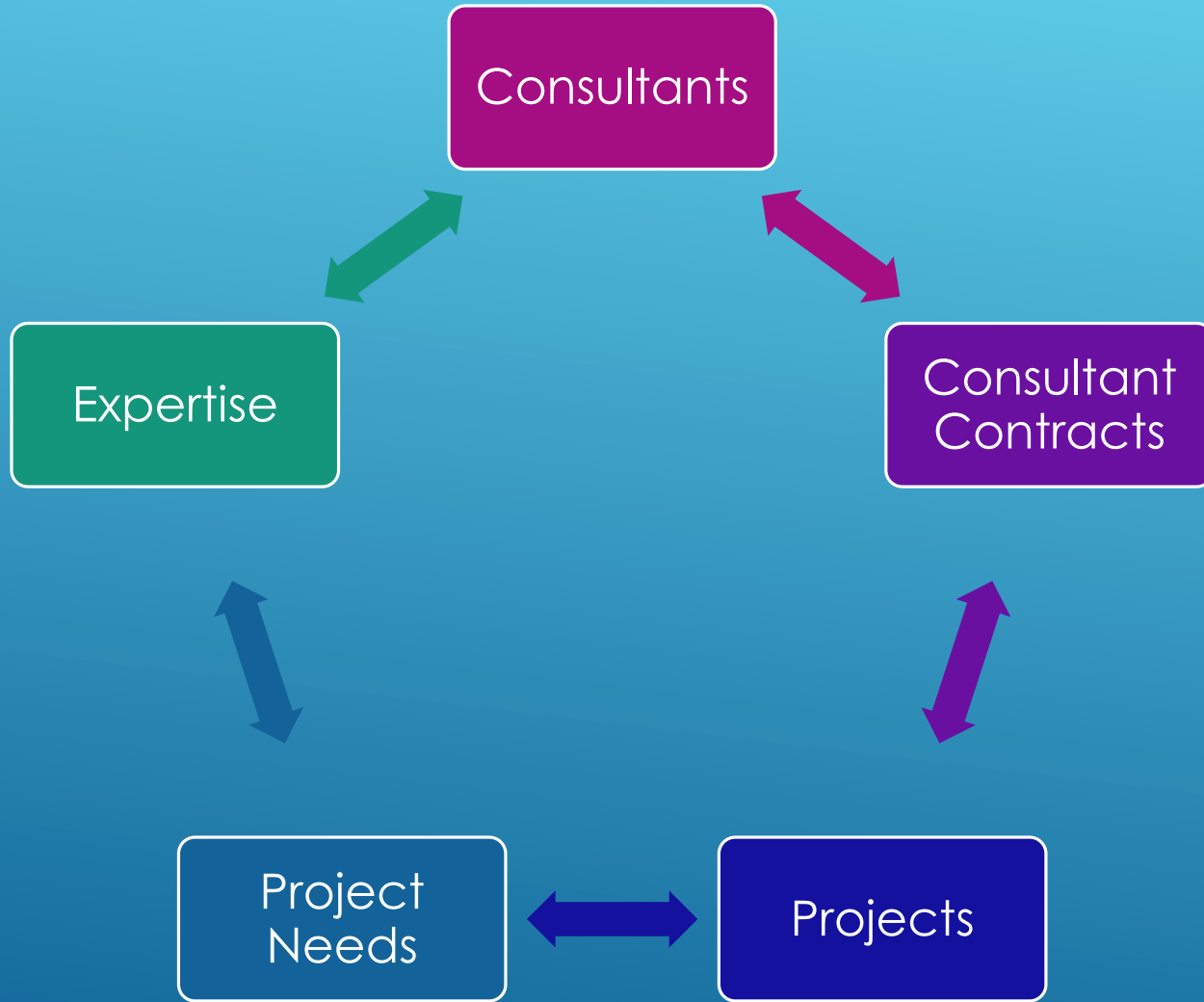
© 2017 Inspiring Technologies



PURPOSE

Consultants Management Express is designed to facilitate the management of consultants, or project-employees.

It provides a central repository of your consultants contact information, the projects they've worked on, and the skills and expertise they provided.



FLEXIBLE DATA INPUT AND SMART RELATIONS

Consultants Management allows you to add data as you need. It automatically links your data and reminds you of your next step.

1. CONSULTANTS

Adding consultants is as simple as filling in some basic information fields. In addition, if you have a sheet of the consultants you usually work with, then you can copy this sheet (from Excel) and paste it in the Datasheet view (2nd tab on top).

Also note how easily you can link the Expertise and Contracts for each consultant from the lower tabs on the same screen.

List Datasheet

Filter the list... 🔍

Leslie Ryan
Mike Smith

+ 🗑️ ✎️ 📄 ✕

First Name	Leslie	Last Name	Ryan
Email	RyanL@lighting.com	Job Title	Lighting Specialist
Work Phone		Mobile Phone	
Address 1		Resume or CV	Ryan L Resume
Address 2		Notes	
City	Bellevue		
State/Province	WA		
ZIP/Postal Code			
Country/Region			

[Consultant Expertise](#) [Consultant Contracts](#)

Expertise

Interior Design/Lighting

[Add Consultant Expertise](#)

2. PROJECTS

Adding projects is as easy as adding consultants. A few data fields to be filled and you're set to go.

From the projects List view, you can link Project Needs (expertise needed), and review Recommended Consultants who match those needs, and finally decide upon and link a consultant or more for the project in the Consultant Contracts area below.

List Datasheet

Filter the list...

New Pier Building 6/1/2017	Project Name New Pier Building	Project Library Pier Building Documents
Museum Expansion 3/20/2017	Start 6/1/2017	Finish 12/28/2018

Project Needs Recommended Consultants

Consultant	Expertise
Brian Golding	Mechanical Engineering/HVAC
Mike Smith	Architecture/Design

Consultant Contracts

Engagement Title	Consultant	Engagement Start	Engagement End
<i>There are no related items.</i>			

Add Consultant Contracts


3. CONTRACTS







If you haven't already added Consultant contracts through the Consultants tile, or the Projects tile, the Contracts tile allows you to add those contracts.

The Contracts tile allows you to link a project with a consultant, reminding you of the project's start and finish dates, and providing you with areas to link contract documents, deliverables.

Once a contract is finished, you have the opportunity to rate the outcome and performance of the Consultant.

List Datasheet

Filter the list... 

Contract	C2017-12 Museum AE	Project	Museum Expansion
Contract Start	3/20/2017	Project Start	<input type="text" value="3/20/2017"/>
Contract Finish	9/29/2017	Project Finish	<input type="text" value="10/20/2017"/>
Contract Link	<input type="text" value="C2017-12"/>	Deliverables Link	
Consultant	Mike Smith	Outcome Rating	

4. EXPERTISE

The Expertise tile is the simplest of them all. Basically it allows you to add the fields you work with, and the skills needed.

After adding the expertise, you can link them to existing consultants or projects.

The screenshot shows a software interface for managing expertise. On the left, there is a 'List Datasheet' section with a search bar labeled 'Filter the list...'. Below the search bar, a list of expertise categories is shown: 'Architecture' (with 'Design' as a sub-item), 'Electrical Engineering' (with 'Installations' as a sub-item), 'Interior Design' (with 'Lighting' as a sub-item), and 'Mechanical Engineering' (with 'HVAC' as a sub-item). The 'Architecture' category is currently selected. To the right of the list, there are several icons: a plus sign, a trash can, a pencil, a refresh symbol, a close (X) button, and a checkmark. Below these icons, the 'Field' is set to 'Architecture' and the 'Skill' is set to 'Design'. The 'Expertise' is listed as 'Architecture/Design'. Below this, there are two tabs: 'Consultants' (which is active) and 'Projects'. Under the 'Consultants' tab, a list of consultants is shown, with 'Mike Smith' as the only entry. At the bottom of the interface, there is a button labeled 'Add Consultants'.

THANK YOU

Thanks for taking the time to review the features of our product. If you still have questions, please don't hesitate to [contact us](#).

A decorative graphic consisting of several parallel white lines of varying lengths, slanted upwards from left to right, located in the bottom right corner of the slide.