

# Portfolio Management Tool (PMT)

## Database Documentation

Schema Diagrams

- PMT 2.0
- PMT 3.0

Draft Version

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Most entities have a taxonomy table, their relationships are not shown to reserve readability.

boundary_taxonomy
contact_taxonomy
detail_taxonomy
financial_taxonomy
location_taxonomy
organization_taxonomy
participation_taxonomy
result_taxonomy
activity_taxonomy
activity_taxonomy
PKFK activity_id
PKFK classification_id
PK _field

Most entities have the following fields.

Repetitive Fields
_active
_retired_by
_created_date
_updated_by
_created_by
_updated_date

Used to connect to taxonomies together to allow data to be interchangeably described by either taxonomy regardless of the data's origin taxonomy

taxonomy_xwalk
PK id
FK origin_taxonomy_id
FK linked_taxonomy_id
FK origin_classification_id
FK linked_classification_id
_direction

PMT system table, tracking database model changes

version
PK id
_version
_iteration
_changset
_created_date
_updated_date

Contains information regarding the PMT Database instance. This is a system table for system related information and does not contain portfolio data.

config
PK id
_version
_download_dir
_created_date
_updated_date

Contains information about users accessing the PMT database.

user_log
PK id
user_id
_username
_access_date
_status

Additional activity details not represented in the activity table.

detail
PK id
FK activity_id
_title
_description
_amount

has parent classification

classification
PK id
FK taxonomy_id
_code
_name
_description
_iati_code
_iati_name
_iati_description
FK parent_id

has classification

PKFK activity_id
PKFK classification_id
PK _field

a feature may have a taxonomy classification

Describes how taxonomies are used in the system

taxonomy_rule
PK id
FK taxonomy_id
FK data_group_id
_type
_cardinality
_xwalk

Data Group is a core PMT taxonomy. All rules MUST have a valid classification for Data Group

Loads IATI formatted xml data into the PMT database

iati_import
PK id
_action
_type
_codelist
_data_group
_version
_error
_xml
_created_by
_created_date

a taxonomy has classifications

taxonomy
PK id
_name
_description
_iati_codelist
FK parent_id
_is_category

has parent taxonomy

Data Group is a core PMT taxonomy. All activities MUST have a valid classification for Data Group

Information related to activities that describe an outcome

result
PK id
FK activity_id
_title
_description

a feature belongs to a boundary

feature_taxonomy
PKFK feature_id
PKFK boundary_id
PKFK classification_id

Keeps track of all the available boundary data loaded into the PMT Database. A boundary is a polygon representation of an administrative boundary

boundary
PK id
_name
_description
_spatial_table
_version
_source
_type
_admin_level
_group

# PMT 3.0 Schema Diagram

## DRAFT

entity
spatial entity
taxonomy
junction table

The main table in the data model, representing the highest level in the hierarchy of data elements. The activity table houses all activity related data.

activity
PK id
FK data_group_id
FK parent_id
_title
_label
_description
_objective
_content
_url
_start date
_plan_start date
_end date
_plan_end date
_tags
_iati_identifier
FK iati_import_id

an activity may have details

an activity can have related activities

an activity may have results

an activity can be imported from an IATI document

The location table contains a spatial location associated to an activity.

location
PK id
FK activity_id
FK boundary_id
FK feature_id
_title
_description
_x
_y
_lat_dd
_long_dd
_latlong
_admin0
_admin1
_admin2
_admin3
_admin4
_admin_level
_point

an activity may have locations

a location intersects features in boundaries

a feature may have a taxonomy

Represents the diverse relationship between locations and the available boundaries within the PMT. When a location point is inserted or updated a trigger locates all the boundary features intersected by that point and records the relationship.

location_boundary
PKFK location_id
PKFK boundary_id
PKFK feature_id
_feature_name

a location intersects a feature in boundary

a location intersects features in boundaries

a feature belongs to a boundary

Financial information related to activities.

financial
PK id
FK activity_id
FK provider_id
FK recipient_id
_amount
_start_date
_end_date

an activity may have financial information

an organization can provide or receive funding

Individual administrative boundary tables. GAUL boundaries are included in Core PMT, however any number of additional boundaries can be loaded.

gaul2
gaul1
gaul0
PK id
FK boundary_id
_code
_name
_label
...
_polygon

Boundary tables must contain fields showing but may have several unique fields as well

an organization can participate in activities

organization
PK id
_name
_label
_address1
_address2
_city
_state_province
_postal_code
_country
_direct_phone
_mobile_phone
_fax
_url
FK iati_import_id

a user belongs to an organization

Contains all the PMT users.

users
PK id
FK organization_id
FK role_id
_first_name
_last_name
_username
_email
_password

a user has authorization on activities

Contains the roles users can be assigned to. Roles determine permissions.

role
PK id
_name
_description
_read
_create
_update
_delete
_super
_security

a user is authorized by a role

Provides users permissions via roles to activities. Assignments of permissions for a user to activities can be done per activity or by a taxonomy classification.

user_activity_role
FK id
FK user_id
FK role_id
FK activity_id
FK classification_id

a user has authorization on the database

Contains information about organizations that participate in activities in one of the four capacities outline in the IATI Standard for Organization Roles

organization
PK id
_name
_label
_address1
_address2
_city
_state_province
_postal_code
_country
_direct_phone
_mobile_phone
_fax
_url
FK iati_import_id

a contact belongs to an organization

Contains information about people that can be considered as a point of contact for an activity or organization.

contact
PK id
FK organization_id
_salutation
_first_name
_initial
_last_name
_title
_address1
_address2
_city
_state_province
_postal_code
_country
_direct_phone
_mobile_phone
_fax
_email
_url
FK iati_import_id

a contact can be assigned to activities

Represents the diverse relationship between activities and organizations.

participation
PK id
FK activity_id
FK organization_id

a contact belongs to an organization

an activity can have contacts

activity_contact
FK activity_id
FK contact_id

## PMT 2.0 Schema Diagram

Each entity has a taxonomy table, their relationships are not shown to reserve readability.

