# Introduction & Executive Summary

Building on the previous memo and report I have drafted a first-pass database schema. This schema has 8 preliminary tables. They are: Investor\_Contact, CS\_Representative, Compliance\_Report, Credential, Client, Investment\_Manager, Investment\_Portfolio, and Investment. This report concludes with 3 questions to further understand the database requirements and perfect the first-pass database schema.

# Current Database Diagram

Diagram

Description automatically generated

# Three Additional Questions

1. What data do compliance reports have?
   1. Will it be sufficient to just save a pdf or word document?
2. What levels of credentials will we have?
   1. Credentials for clients to view their National Investments Account.
   2. Credentials for National Investments Employees to access the National Investments System.
      1. What tiers of internal credentials will we have?
3. What investment data will be used to generate the investment performance metrics for the dashboard?

# Conclusion

A preliminary database diagram was submitted with this report. This is not an exhaustive list of the new database’s tables. To better classify and plan the relations and tables in this database I need more information. What information do compliance reports contain? What types and levels of credentials will National Investments use? What investment data will be used to generate the investment performance metrics for the dashboard?