# Introduction & Executive Summary

Building on the previous progress report I have updated the database schema to include the new information that National Investments has shared with me. I have added one new table, Strategy. There are now 9 tables. They are: Investor\_Contact, CS\_Representative, Compliance\_Report, Credential, Client, Investment\_Manager, Investment\_Portfolio, Investment, and Strategy. This report includes images of the schema and the first attempt at implementing the schema in Microsoft SQL Server Management Studio.

The database tables were further refined by the additional information provided by National Investments for this progress report. My questions regarding compliance and credentials were answered as well. I have decided on data types for the table attributes. I would like clarification on how investments, clients, and accounts are related to each other. I would also like clarification on the security requirements and strategy. The project is progressing very well, I do not anticipate any delays at this time.

# Updated Database Diagram

Diagram, schematic

Description automatically generated

Microsoft SQL Server Management Studio Database View

A picture containing graphical user interface, diagram

Description automatically generated

Microsoft SQL Server Management Studio Database View #2

Diagram, engineering drawing

Description automatically generated

# Questions

1. I would like clarification as to how to better relate the Investment, Investment\_Portfolio, and Strategy.
   1. I expect the next section will clarify this, at least in part.
2. I would like clarification on our security strategy and requirements.
   1. Regarding both internal and external security.

# Conclusion

The preceding 3 pages were diagrams relevant to this database’s progress. They represent the model in both its abstract and implemented forms. I do not believe this is a final version of this database. The questions from the last report have been answered by the new material presented in the current portion of this project.

I still have remaining questions. I would like to learn more about how exactly assets are managed and what layers there are to their management that are relevant to this database. I may need to adjust the Investment, Investment\_Portfolio, and Strategy tables.

This project is progressing at a steady velocity. I am satisfied with our success to this point. I believe that having a database live on a server is a major milestone. There is still quite a bit of remaining work left to complete on this project, but I am confident on its timely delivery.