

Example Documentation

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Proposal for Overland Travel Agency

INTRODUCTION

Increased business, duplicate business functions and delays in servicing client requests point out the need for improvements in handling client information. The addition of an easily accessible, readily updateable database would allow agents to personalize phone and email requests from repeat customers by being able to access past records from one location. In addition, new client information could be entered by each agent at their computer terminal, thus eliminating the backlog of data entries that now exist. Oracle Data Modeling Consultants offers the best solution for this problem. The full implementation of the database should take less than four weeks from the date of approval. All staff will be trained and using the database within that time period.

Oracle Data Modeling Consultants can remedy the existing problem of handling client information by creating a database that agents can access from their computer terminal. Agents, while on the phone or responding to email, will be able to enter a last name and be presented with past travel agendas, travel requests or pending travel arrangements. Agents will be able to add new clients and be able to generate mailing lists for advertising. Data entry will be immediate, therefore eliminating the backlog that now exists. Agents will be able to share information for group travel events and present an "any agent can" interface to the customer. This remedies the problem of clients having to speak to the same agent to have questions answered. Clients will not need to wait or be called back as is presently done.

BUSINESS AND MISSION

Overland Travel Agency is a small but growing company that specializes in personal travel arrangements for business and individuals. The mission of the company is to provide personalized service to any client from all of Overland's agents. Overland strives to create a friendly "one-stop" place for clients to make travel arrangements. Overland wants to appear "fresh and up-to-date." They strive to inform clients about new and exciting travel deals and adventures.

INFORMATION REQUIREMENTS

Overland Travel needs up-to-date client information including business and home addresses, last name and first name, past travel arrangements, future travel plans and client preferred modes of travel. They also need travel particulars such as handicap accommodations, special meals required, where tickets are billed and delivered, persons who regularly accompany them traveling and other information pertinent to the customer. Client families or groups must be able to be identified both as a group and as individuals.

BUSINESS RULES

At Overland Travel, each travel agent should be able to assist any customer that calls on the phone or sends an email without having to leave his/her desk. A customer may be referred to as a client. A customer is anyone who has made a request for travel but may or may not have actually booked a reservation. Agents do not work on a commission basis so access to client information is shared by all agents. Agents should be able to enter and store comments related to each client as needed.

ASSUMPTIONS

- Clients are aware that the information they provide will be shared with all agents, and they are agreeable to this.
- Clients are willing to work with different agents on their travel plans. They may request a “preferred agent”, but are willing to talk with someone else if that person is not available.
- Past data will be entered into the database to provide a “history” for clients who have previously done business with Overland Travel.