



User guide

TOURISM DATABASE

1. OVERVIEW

The *proCAM* Tourism Database is specifically designed to assist tourism businesses manage relationships with their major suppliers - inbound operators, travel wholesalers, travel agents and travel media.

In general IT terminology it is known as a CRM - Customer Relationship Manager. There are many commercially available CRM's available but none are designed for the specific needs of the tourism industry, neither in terminology nor the way the data is maintained.

Historically most tourism businesses have used spreadsheets to maintain data about their suppliers. Spreadsheets are effective for handling and computing numeric data - that is what they are designed for - but are very dangerous places to store important text data in record format. It is very easy to miss-sort the data and destroy its integrity. It is also very difficult to search for information.

A relational database program such as MS Access is specifically designed to hold data, specifically the type of data that *proCAM* has been designed for.

proCAM has been built using the latest Microsoft Office relational database program Access 2013. This was chosen for several reasons:

- Microsoft Office is being used by the majority of the potential users of *proCAM*, so there is a familiarity with the general product.
- Office 2013 was chosen as it meets the latest challenges of allowing for 'Cloud' computing, i.e. keeping data offsite in a secure MS run server, to be accessed from anywhere on any device capable of running a browser connected to the internet.

The data itself is maintained in tables which appear very similar to a spreadsheet table, but they can be linked together to create a structure. The tables themselves are hidden from direct user view behind a program layer. The user interface is through a series of forms managed by the program layer.

For a more detailed description read the section below 'What is a relational database?'

The screenshot displays the *proCAM* Tourism Database interface. In the background, a table titled 'tblCompany' is visible, listing various companies with columns for Company_id, Company_name, Bio, Company_type, Main_inbound, Second_inbound, Future_4, Special_product, Company_status, Website, Publications, Payment_term, and Bank. A 'Tourism contact database' window is open, showing a 'Company details update' form for 'Demo Company Name'. The form includes fields for 'Show status' (Open, Closed, Suspended), 'Company name' (Abercrombie & Kent Inc), and buttons for 'Create new company', 'Close Form', and 'Save company'. Below this, there are tabs for 'Main data', 'People', 'Commissions and payment', and 'Notes_Publications'. The 'People' tab is active, showing a list of contacts with columns for First name, Surname, Direct line, Mobile, and Office. Contacts listed include Charlie Hellman, Jessica Hanshue, and Shawn Johnson. At the bottom, there are sections for 'Office descriptor' and 'Address_line' with fields for City, Postcode, State, and Country, and buttons for 'Save changes' and 'Add new office'. A text box overlay on the right states: 'The database tables are hidden from the user behind forms'.

2. OBJECTIVE OF THE DATABASE

SECURITY OF DATA

As discussed in the introduction there are several aspects to maintaining the security of the data.

- protecting the data from inadvertent corruption.

Using a relational database under program control solves this issue. Unlike with a spreadsheet, the user is unable to directly access the raw data tables and therefore it is impossible to reorganise the data and destroy the data integrity. The program layer sits between the user and the data tables and controls both the view of the data and what the user is able to do.

- protecting the data from loss

The *proCAM* backup system goes some way to solving this issue. Taking a frequent backup is useful as it is possible to 'roll back' to the previous version if, for example, something goes wrong with a spreadsheet import. The user will be advised at logon the age of the last backup.

Note that taking a backup will not protect the data from a hard disk crash or a house fire so some form of offsite backup is also required. One benefit of using Microsoft Office 2013 is that it is possible to store the data in the cloud so that the database will automatically be loaded into the cloud which solves the disk crash issue.

Office 2013 allows for browser access to the database, so a future upgrade to the database will be the possibility to access the database from any device able to run a browser, which will be useful at trade shows and so on.

PASSWORD ACCESS

The program layer also protects the data by requiring password access. The passwords have 4 levels as follows:

1. admin user with access to everything
2. full access user with access to everything except password management and other system functions. These users are able to add new record into the database
3. read/write access - the user can insert and amend records. This would be the 'general' user level
4. read only users who can look but not change

Note that due to the way that Access works the current password control system is only designed to control access from general skill level users. It is possible for someone with Access programming skills to circumvent the password system. A future upgrade will address this for users who require a high level of security and control access only through the password system.

91PasswordEntry

Welcome

Demo Company Name

Contact database

Please enter your password

Login Cancel

93Passwords

Passwords

Demo Company Name

Person	Password	All	Major	Minor	View only	User level
Admin	admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1
Brian	brian	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	2
Karen	karen	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	3
Louise	choppy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	4

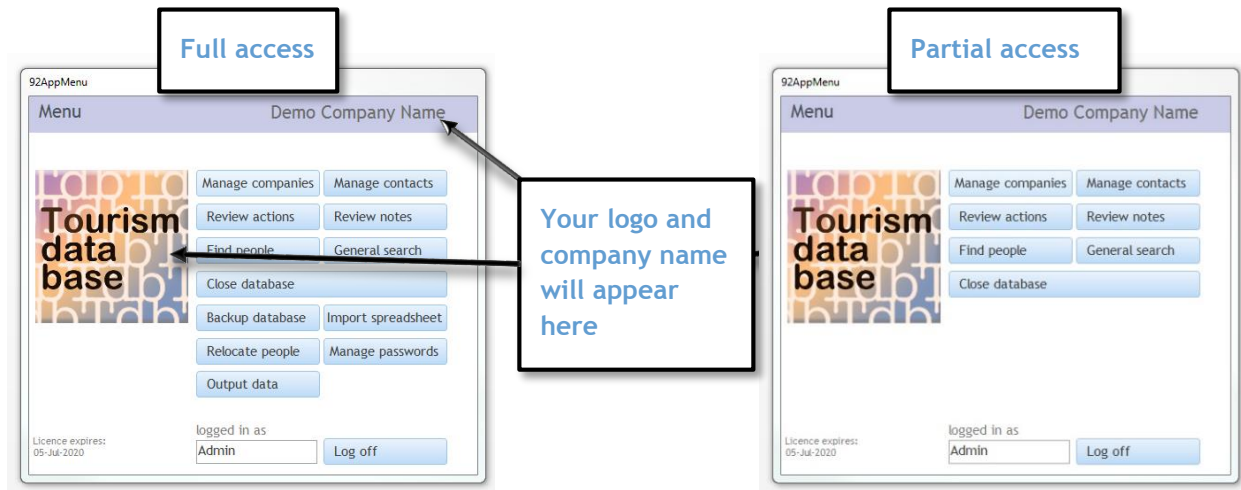
Close Form

Passwords are used to control which users can do what

USER ACCESS

Once a valid password has been entered, the 'Menu' form is used to control the data base.

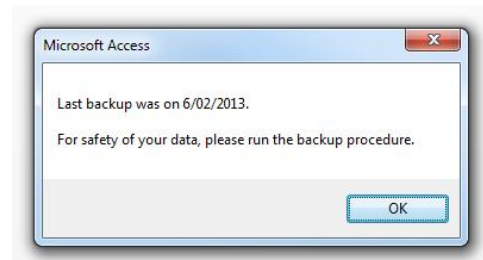
Depending upon the user access level, various menu views are displayed.



BACKUPS

The backup system takes a 'snapshot' of the database and stores it in the backups folder. This folder can be adjacent to the live database or anywhere on the users system or network.

When a user logs on if the last backup is older than 5 days the user is advised of the age of the last backup.



3. LOOKING UP DATA

Easy access to the data is one of the main reasons to use a database, so *proCAM* provides several ways to access the data.

They are based around the type of request the user has, for example:

- "who works at company X"
- "I need to contact Jane Smith"
- "I meet someone at TRENZ last year and I cannot remember their name"

It is possible to find this information in a number of different ways using the query search forms. Although specific forms have been designed to answer particular kinds of queries any form can be used to answer a variety of search questions. The form you choose will depend on where you are starting from.

To answer the first query the 'Manage Companies' form would perhaps be best. Enter a few characters for the company name and choose the company required from the drop down list.

The image shows two screenshots of the 'Company details update' form. The left screenshot shows the 'Company names' dropdown menu open, listing various travel companies. The right screenshot shows the form with 'Pan Pacific' selected in the dropdown.

The 'Lookup people' form is best for the second query. Enter Jane in the 'First name' box and all the Jane's (or first names which include the text 'jane') in the database will be displayed - or Smith in the 'Surname' box.

The image shows the 'Lookup people' form with search results for 'Jane'. The results are displayed in a table with columns for First name, Surname, Direct line, Mobile, and Office phone. Each row includes a 'Details' button, a 'New note' button, and a 'New action' button.

First name	Surname	Direct line	Mobile	Office phone
Jane	Boardman	0113 246 2200		0207 628 7628
Mary Jane	Burnham	714 960 4011		714 960 4011
Janelle	Cook	800 388 1828		
Jane	Franklin	312 980 8019		
Janet	Hysman			610 896 9595
Jane	Lomba			
Janet	Meesham	09 915 8888		

The last query is answered by the 'General search' form. Enter TRENZ in the search box and all records which contain the text 'TRENZ' will be displayed. All sub records, e.g. Notes and Actions are also searched.

The screenshot shows a web application window titled 'ASGeneralSearchPeople'. It has a 'Lookup people' header and a 'Demo Company Name' label. A search box contains the text 'TRE' and a 'Close Form' button is to its right. Below the search box is a table of search results. The table has columns: First_name, Surname, Direct_line, Mobile, Office, and Office phone. The results list several people, including Jacqueline Balzan, Miles Clark, Brian Feldbloom, Sandra Harrison, Trent Hickman, Enal Hutchinson, Anne-Marie Johnson, Kyle Kemp, Gregory Kitchen, and Andrew Levine. Each row has links for 'Details', 'New note', and 'New action'.

First_name	Surname	Direct_line	Mobile	Office	Office phone
Jacqueline	Balzan	02 9691 0890			02 9691 0890
Company	Qantas Holidays		Office	197-201 Coward Street	
Miles	Clark				9 575 6063
Company	Moa Trek		Office	Auckland	
Brian	Feldbloom				+61 7 3022 9496
Company	Flight Centre Global Product		Office	Brisbane	
Sandra	Harrison				1244355434
Company	Elegant Resorts		Office	Chester	
Trent	Hickman				+64 (7) 571 7930
Company	Exclusively New Zealand		Office	Tauranga	
Enal	Hutchinson				9 575 6063
Company	Moa Trek		Office	Auckland	
Anne-Marie	Johnson				04 495 0817 008
Company	Tianz		Office	Wellington	
Kyle	Kemp	02 9691 0540			02 9691 0890
Company	Qantas Holidays		Office	197-201 Coward Street	
Gregory	Kitchen				+61 7 3022 9496
Company	Flight Centre Global Product		Office	Brisbane	
Andrew	Levine				02 9691 0890
Company	Qantas Holidays		Office	197-201 Coward Street	

Whatever search option is used, the same Person display is used'

The screenshot shows a web application window with a 'Main data' section. It has tabs for 'People', 'Commissions and payment', and 'Notes_Publications'. The 'People' tab is active, showing a table of people. The table has columns: First name, Surname, Direct line, Mobile, Office, and buttons for 'Detail', '+ Note', and '+ Action'. The people listed are Anne Marshall, Allen Brooker, and Regina Price. There is also an 'Add new contact to this company' button at the bottom.

First name	Surname	Direct line	Mobile	Office	Detail	+ Note	+ Action
Anne	Marshall			Auckland	Detail	+ Note	+ Action
Allen	Brooker			Auckland	Detail	+ Note	+ Action
Regina	Price			Auckland	Detail	+ Note	+ Action

Clicking on detail brings up the Person detail form.

The screenshot shows a web application window titled '12PeopleDetailSubform'. It has a 'Contact details update' header and a 'Demo database' label. The form is for updating contact details for Anne Marshall. It has tabs for 'Contact details', 'Notes', 'Actions', and 'History'. The 'Contact details' tab is active, showing a form with fields for Salutation, First name, Surname, Company, Status, Job title, Country / Direct_line, Mobile, Email, Inbound agent used, Office, Person_type, Special_rates, First meeting date, First meeting location, Source, Nickname, Spouse_name, Birthdate, and Photo. There are buttons for 'Save changes', 'Cancel changes', 'Send e-mail', 'Call using Skype', and 'Browse for image'. A photo of Anne Marshall is displayed on the right. A text box at the bottom provides a biography of Anne.

Salutation: Ms First name: Anne Surname: Marshall Company: Pan Pacific Status: Open

Job title: FIT Operations Manager

Country / Direct_line: 64 09 520 4963

Mobile:

Email: info@panpacific.co.nz

Inbound agent used:

Office: Auckland

Person_type:

Special_rates:

First meeting date: 10-May-12

First meeting location: TRENZ 2012

Source:

Nickname:

Spouse_name:

Birthdate:

Photo:

Photo_file_name: E:\My Documents\PIOTourism_Database\Deliverable\Images\AnneM_L.jpg

Anne joined Pan Pacific in 2006 and has over 20 years NZ Inbound experience with several well-known International travel companies and has also sold and marketed New Zealand whilst based in Australia and the USA. Anne is responsible for the day to day operations of the FIT team, product development and annual brochure planning & support

Notes and Actions can be accessed by clicking on the tabs

12PeopleDetailSubform

Contact details update

Demo database

Salutation: Ms First_name: Anne Surname: Marshall Company: Pan Pacific Status: Open [Close Form](#)

[Contact details](#) [Notes](#) [Actions](#) [History](#) [Print information](#)

Date	Type	Title	
05-Jun-13	Phone call	New Rates	Admin
Called Anne to discuss new rate structure			
01-May-13	Phone call	TRENZ	Admin
Appointment at TRENZ			

[Create note](#)

Clicking on 'Send email' opens your e-mail client ready to send an e-mail, and 'Call using Skype' will open Skype ready to call.

Print information generates a report in a saved Word document with everything for that person.

Person Report

Saturday, 6 July 2013 3:23:21 p.m.

Ms Anne Marshall Pan Pacific 1379

Title FIT Operations Manager Office 1195

Person_type Phone 64 09 520 4963

Special contact type Mobile

Add. contact type Fax

Inbound_agent_used Email info@panpacific.co.nz


Special_rates Skype_name AnneM

Birthday First meeting date 10/05/2012

Spouse_name First meeting place TRENZ 2012

Accept_newsletters Source

Comment Anne joined Pan Pacific in 2006 and has over 20 years NZ Inbound experience with several well-known International travel companies and has also sold and marketed New Zealand whilst based in Australia and the USA. Anne is responsible for the day to day operations of the FIT team, product development and annual brochure planning & support to off shore partners.



Notes

Date	Type	Title	
05-Jun-13	Phone call	New Rates	Admin
Called Anne to discuss new rate structure			
01-May-13	Phone call	TRENZ	Admin
Appointment at TRENZ			

Actions

Date set	Date due	Date	Action_title	Action created by
01-May-13	20-Jun-13		Provide new rates	Admin

4. INSERTING DATA

Inserting a new person in the database is completed in a few steps:

- First the company they work for is created with identifiers for the type of business, etc, followed by the office address, phone numbers and so on. Finally the person named and personal data is entered.
- When the company is created companies with similar names are displayed to try and prevent a duplicated record being entered. Again when the first name and surname are entered similar names are displayed.
- Whenever a record is created the user name of the user who entered the record is automatically recorded.

However a significant amount of data can be entered in spreadsheet form, for example, all those who attended a Trade Show is usually made available by the organisers in spreadsheet form.

Importing a spreadsheet is a highly optimised method in *proCAM*, and a separate manual describes how it is done.

5. NOTES AND ACTIONS

Notes and actions can be created for each person in the database.

A Note is designed to record an event, such as a telephone conversation, meeting, e-mail and so on.

An Action is used as a to-do list. Actions can be accessed by various dates or by company, person or user.

The screenshot shows the '50ActionList' application window. The title bar is '50ActionList'. The window has a header 'Action List' and 'Demo database'. Below the header, there are several controls: 'Action date' with radio buttons for 'Date set', 'Date due', and 'Date actioned'; 'Sort sequence' with radio buttons for 'Ascending' and 'Descending'; 'Days ahead' with a text box containing '10'; 'Actioned' with radio buttons for 'Actioned', 'Not actioned', and 'All'; 'Select company' with a dropdown menu; and buttons for 'Close Form', 'Refresh results table', 'Admin', and 'Edit action'. Below these controls is a table with the following columns: 'Date_set', 'Date_due', 'Actioned', 'Date_actioned', 'First_nameSurname', and 'Company_name'. The table contains one row with the following data: '01-May-13', '20-Jun-13', a checkbox, an empty text box, 'Anne|Marshall', and 'Pan Pacific'. Below the table, there is a text box with the text 'Provide new rates' and a button 'Admin'.

The data entered in the Note or Action is particularly useful for the general search query, as this data is searched using free form text.

6. EXPORTING DATA

The most common reason to export data is for a bulk e-mail merge, i.e. sending an e-mail to people selected from the database.

The 'Data output' option enables records to be selected and output to a spreadsheet for subsequent merging with the e-mail.

Choose	First_name	Surname	Company_name	Job_title	Email	Mess
<input checked="" type="checkbox"/>	Kellie	Dawson	Ski Express		kellied@concorde.com.au	
<input checked="" type="checkbox"/>	Nina	de Jongh	Dutch Downunder		info@dutchdownunder.com	
<input checked="" type="checkbox"/>	Katrina	De Vries	American Express Aus	Res Manager	katrina.l.devries@aexp.com	
<input checked="" type="checkbox"/>	Debbie	Fleischer	Travelbookers		debbief@travelbookers.com.au	
<input type="checkbox"/>	Debbie	Fraser	Gilpin Travel	Sen Travel Consultant	debbie@gilpin.co.nz	
<input type="checkbox"/>	Debbie	Haysom	Navigate Oceania		debbie@navigateoceania.com	
<input type="checkbox"/>	Debbie	Kenton	Infinity	Brnad Leader - GM	debbie.kenton@infinityholidays.cc	
<input checked="" type="checkbox"/>	Sarah	DeBenedetta	Swain Tours	VP Ops	sdebenedetta@swaintours.com	
<input checked="" type="checkbox"/>	Deborah Angel	Masetti	Deva Viaggi S.a.s.	CEO	info@devaviaggi.it	
<input type="checkbox"/>	Deborah	Abraham	Pacific Internet Travel Ltd		deb@acrossnz.com	
<input checked="" type="checkbox"/>	Deborah	Coburn	South Pacific Travellers Wo		deb@southpacifictravellers.co.nz	
<input type="checkbox"/>	Debra	Lynch	Unparalleled Journeys	MD	deb@unparalleledjourneys.com	
<input checked="" type="checkbox"/>	Deidre	Molloy	Value Tours	moved jobs no longer NZ	xxxdmolloy@valuetours.com.au	
<input checked="" type="checkbox"/>	Michael	Delaney	New Zealand Travel Centre	Manager	info@nztc.com	
<input type="checkbox"/>	Denise	Campbell	Experience NZ	MD	Denise.Campbell@experiencenz.cc	
<input checked="" type="checkbox"/>	Denise	x	PaR n.z. Golfing Holidays		denise@parnz.co.nz	

Clicking 'Output to spreadsheet' results in a new spreadsheet being created containing the selected data.

	A	B	C	D	E	F	G
1	Salutation	First_name	Surname	Company_name	Job_title	Email	txtMessage
2		Kellie	Dawson	Ski Express		kellied@concorde.	
3		Nina	de Jongh	Dutch Downunder		info@dutchdownu	
4		Katrina	De Vries	American Express	Res Manager	katrina.l.devries	
5		Sarah	DeBenedetta	Swain Tours	VP Ops	sdebenedetta@sw	
6		Deborah Angela	Masetti	Deva Viaggi S.a.s.	CEO	info@devaviaggi.i	
7		Deborah	Coburn	South Pacific		deb@southpacific	
8		Deidre	Molloy	Value Tours	moved jobs no	xxxdmolloy@value	
9		Michael	Delaney	New Zealand	Manager	info@nztc.com	
10		Denise	x	PaR n.z. Golfing		denise@parnz.co.	
11		Dennis	Basham	Blue Holidays	Nat product	dennis.basham@bl	
12		Dennis	Thuesen	Hannibal & Marco		deti@marcopolo.d	
13		Carol	Derdiger	Frosch Travel	Travel Consultant	cderdiger@frosch	
14		Derragh	Dotson	Pinpoint Travel	Product director	derragh.dotson@	
15		Deryn	Roberts	Navigate Oceania		deryn@navigateo	
16		Desley	Curtis	New Zealand		desley.curtis@tou	
17		Sara	Devenie	Southern	General Manager	sara@southern-	

Note that it is possible to add a line of text to each person record to personalise the e-mail.

This spreadsheet can subsequently be re-imported with a note that a mailing was sent, to update *proCAM* records.

7. WHAT IS A DATABASE?

A database could literally be any collection of data maintained in some form of file system. This would include storing data in a spreadsheet program such as Excel.

Keeping contact data in a spreadsheet is fine as long as the potential problems are understood, amongst which are:

- It can be corrupted easily by miss-sorting individual columns
- Data has to be duplicated, for example each person in a company has to have the same company address in their record
- It is difficult to search through the data without visually scanning everything
- There is validation on data (duplicates, misspelling etc.) entered into the spreadsheet
- It is difficult to retrieve grouped data, such as everyone who works for one company

In IT terminology however a database is now taken to mean a specially designed program for managing data arranged in record format. They come in several forms but the most common is called a relational database.

In simple terms, it is called relational because it enables pieces of data to be stored once, and linked ('related') together. For example, a company has many employees, so a single company record is linked to each employee record, which means not holding the company address in each employee record, for example.

This has many advantages, for example if the company phone number changes it only has to be changed in one place, rather than each employee record.

It is also possible to create a program layer to separate the data from the user which at the same time makes it easier to access data, and also protects the data from inadvertent user corruption.

The diagram below shows the main tables in the Tdb, with the fields they contain and how they are linked together. There are numerous other tables which are used to control the database, validate data and so on.

The relationships between the tables are all 'One to many'. This means one company has many employees, one employee has many notes, and so on.

MAIN TABLES AND RELATIONSHIPS IN THE TOURISM DATABASE

