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INSURANCE

Oracle Insurance

Insbridge Enterprise Rating

Design Time Reporting Document

Release 5.4.*x*

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DESIGN TIME REPORTING

The IBRM database is the repository for content created in RateManager. Data is stored in a proprietary format. A design time reporting feature has been added to the IBRM database that allows for access to the IBRM data in a relational data structure and format that can be used for reporting. Data can be extracted and evaluated by a third party reporting tool.

The Insbridge Reporting Doc zip file contains detailed documentation that describes what data is available, the relationships of all data elements, how the data should be accessed, and a sample report that can be created using the available data.

Read only permissions are required to create a connection to the design time reporting feature. Contact your system administrator to request permissions.

To access the design time reporting feature, a third party tool, such as Microsoft Excel, can be used to create a connection to the IBRM database and download data.

Insbridge User Reporting Schema

The Insbridge User Reporting Schema offers a reporting view into the Insbridge RateManager (IBRM) database.

This data is available to any standard SQL Server Database reporting software. Please contact your IT department for your reporting options.

Reporting View Categories

Program Explorer Reporting Views

Universals Reporting Views

Globals Reporting Views

Locals Reporting Views

Summary Reporting Views

General Reporting Views

Table Variable Data Views

See the Insbridge Reporting Doc zip for more information.

Setting Up

A Reporting script must be run from within the RateManager application. Running db update scripts requires admin permissions.

On the DB Updates screen, the current version will be highlighted and the status will be *Current*. The updates below the current version will be grayed out. These updates cannot be run again. Current updates can be re-run if necessary. You will receive an error message if you attempt to run a lower version update. Any version update above the current version will also be grayed out but will be available for executing.

New installations may show the latest version as current but still have only the Tools option available. You may have to run the current script again. To see if you have complete access, click File→Reload to refresh the system.

Navigate to the Tools→Database→Updates.

1. The **Updates** tab is displayed. Select the database you want to view from the **Show updates for** drop down. The database updates for your selection is listed. The last column, the **Status** column, shows you which update is the **Current** one installed.

2. For safety, run or rerun the IBRM and IB_CLIENT scripts before running the Reporting script.

3. Run the reporting script. **The Reporting script must be run last.**
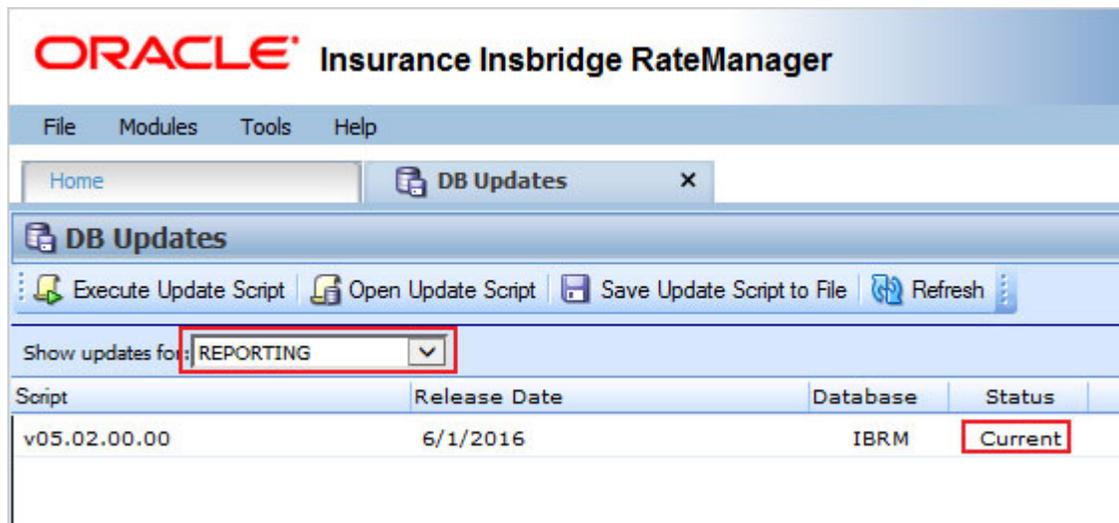
4. Click File→Reload to refresh the system.

5. Return to the Tools menu and Open Setup→Reporting Data Model

6. Click the Update Reporting Views.

This option updates the algorithm steps in the Reporting Data Model. This option only needs to be run once. After it has been run, the data should be in sync.

Insbridge Reporting Doc zip

7.   Download the Insbridge Reporting Doc zip from the documentation download on Oracle Cloud delivery or the Oracle Technical Network. Extract to a location on your local machine.

8.   Open the file and locate the Index.html file.
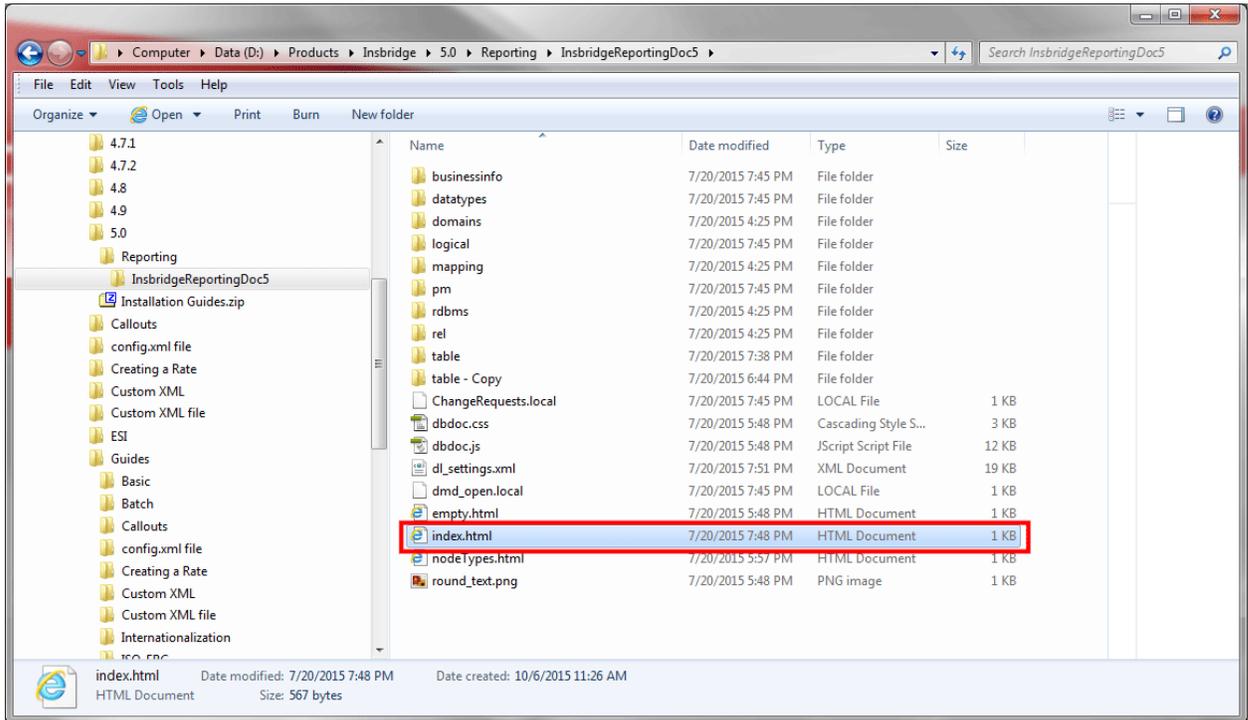
9.   Right click and Open with Internet Explorer.

10. This opens the Insbridge Reporting Details screen.

11. The left side is the views you can select. Click a view to see the details that are presented. In this example, the Programs view was selected. On the right is a listing of columns and column details.

The left side of the Insbridge Reporting Doc lists the available views.
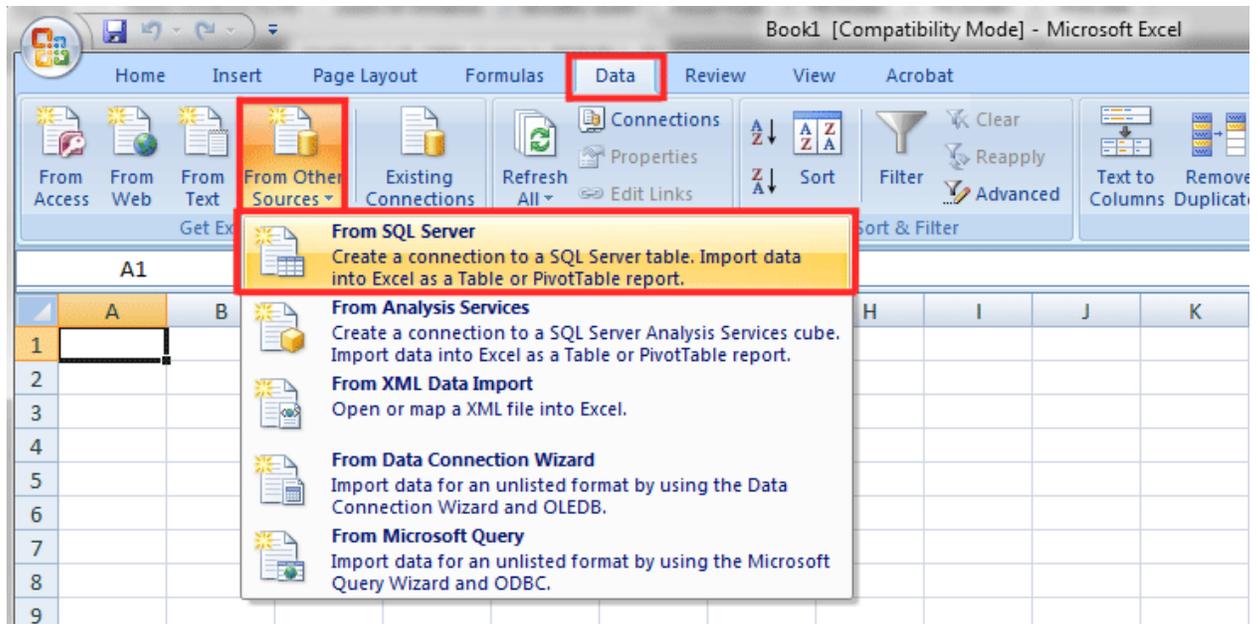
The right side is the naming convention for the view.

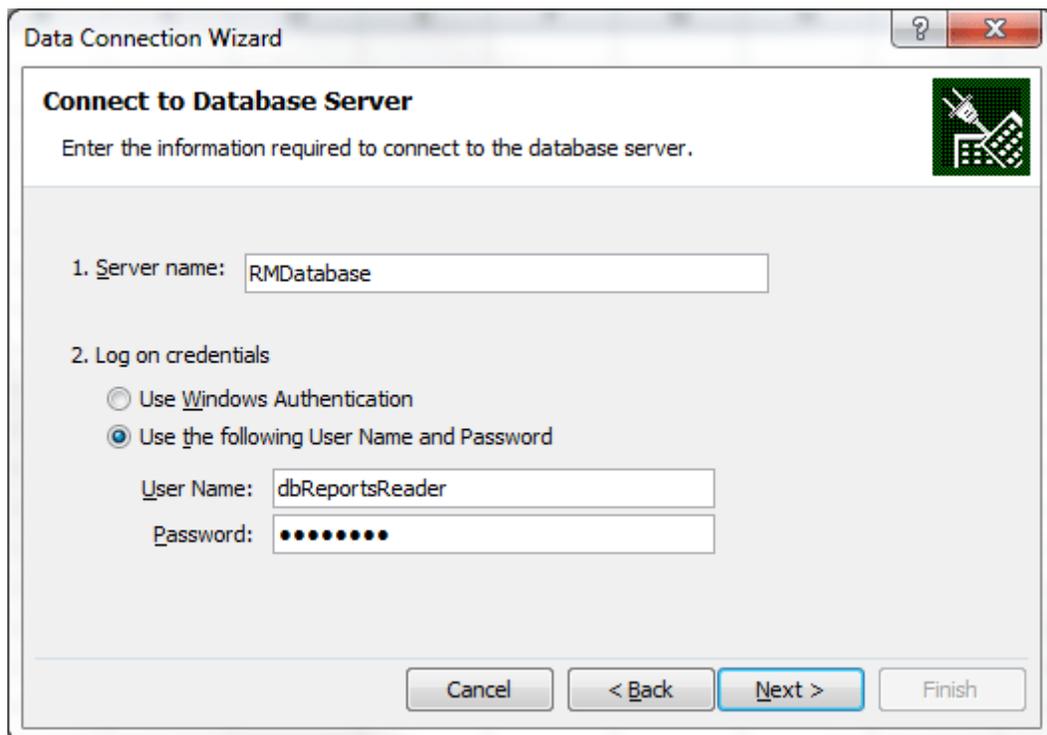12. You can leave this screen open while you work with the data. It is a good reference.

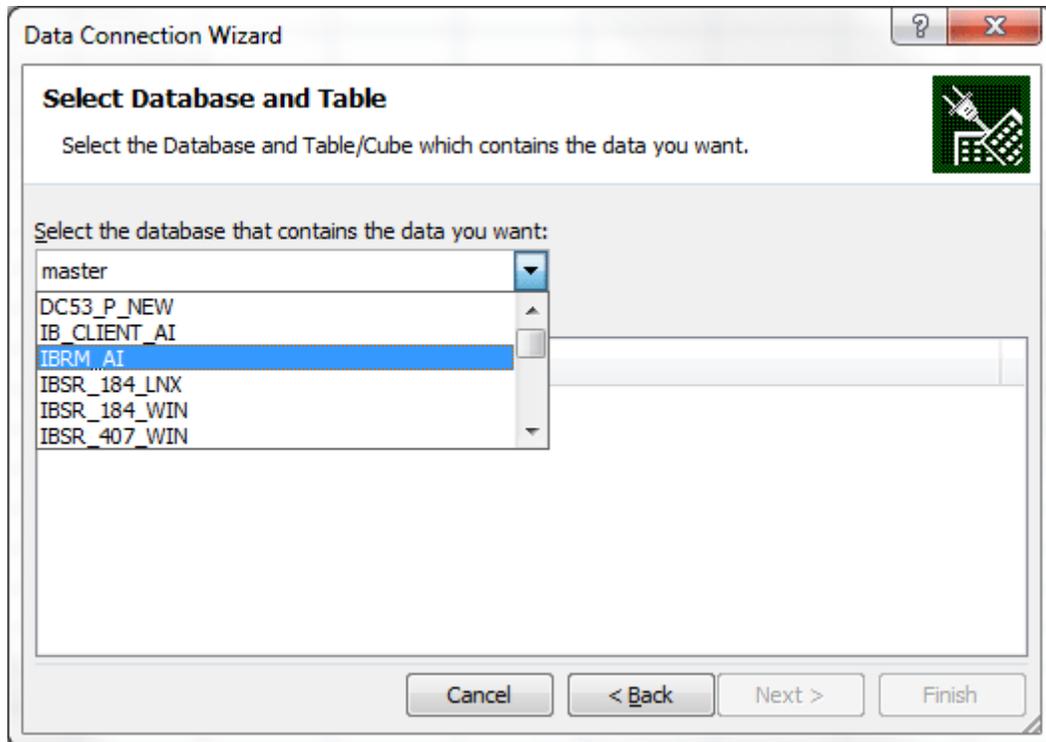13. Close the screen when you are finished.

Setting Up a Connection to SQL Server Example

1. In Excel, select the Data tab.

2. Under Get External Data, select From Other sources.
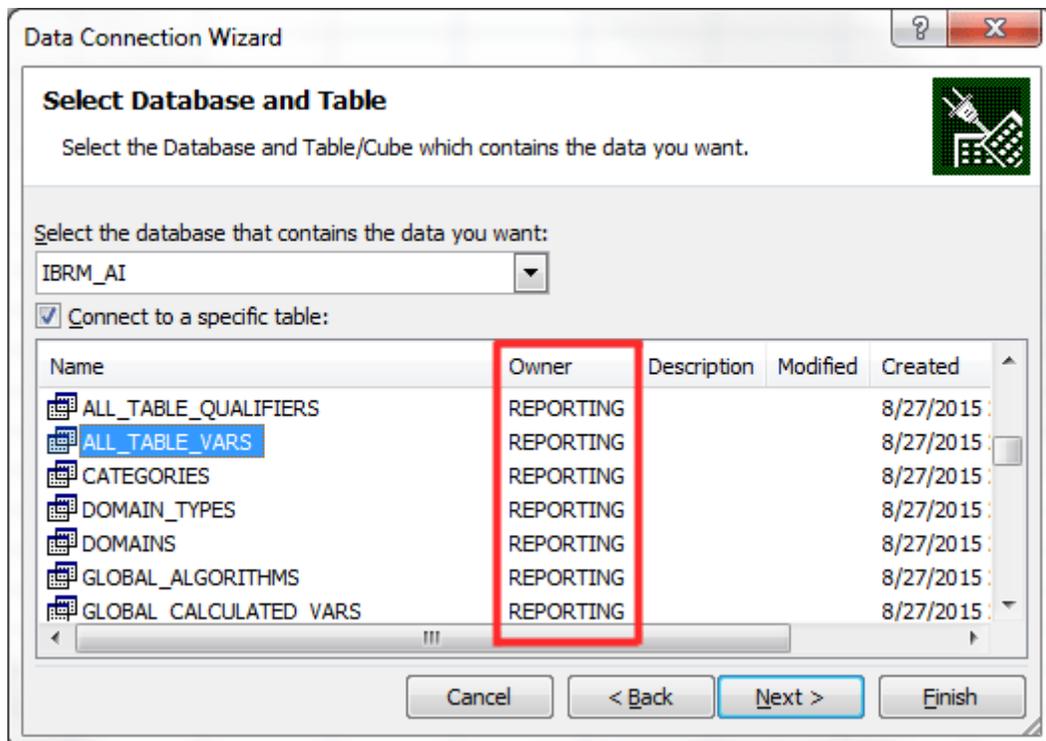
3. Select SQL Server

4. Enter the server name and your database credentials. You must have at least read-only access.
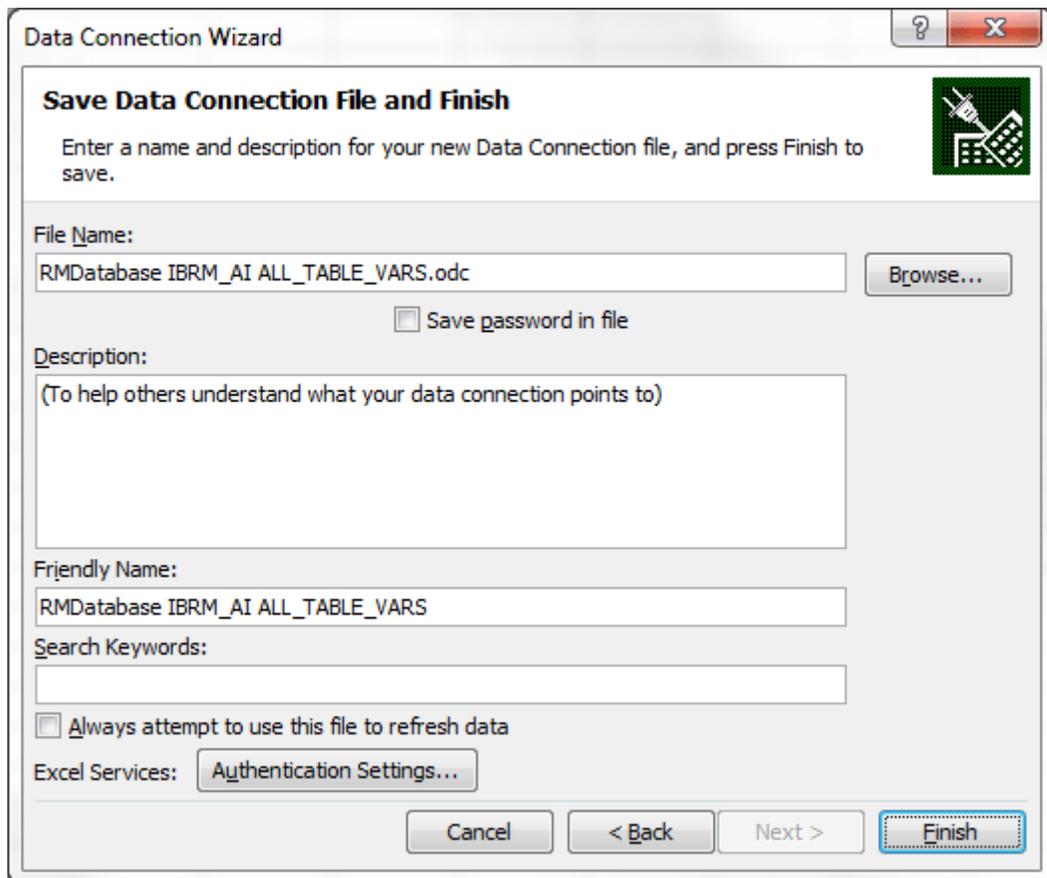

5. Select the IBRM database. The available table will be populated.
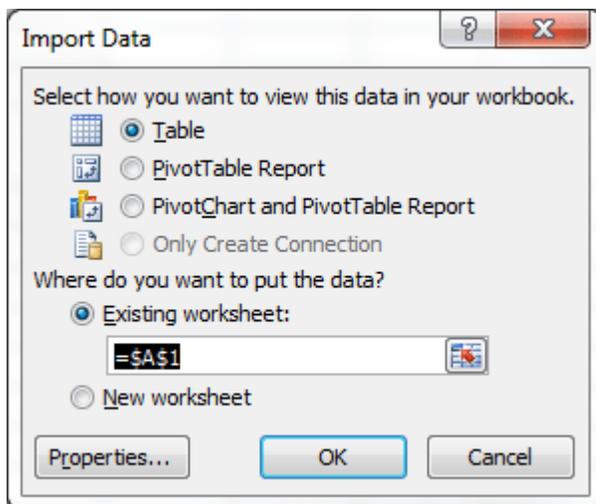
6. Select a table with an Owner of REPORTING. These are the design time reporting views available.

7. If you click next, the data connection file can be saved.

8. If you click Finish, the data will be downloaded but the connection will not be saved.

9. Select how you want to view the data.

10. You may be required to log in again.

11. The data will be presented. This data can be shared and manipulated as needed. Algorithms will have steps presented in a readable format.
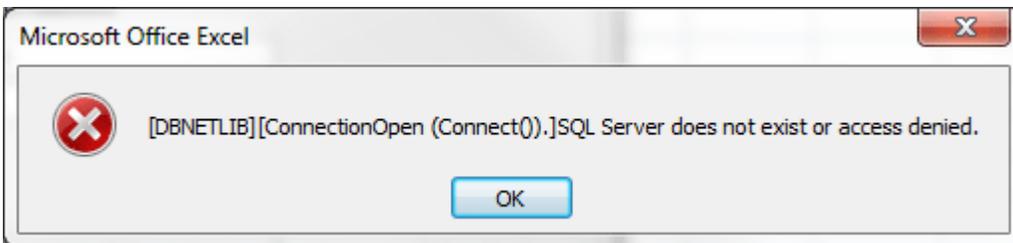

For more information regarding the columns and information presented, please see the Insbridge Reporting Doc zip.

If you saved your connection, you can access the table at a later time by clicking the Existing Connections under Get External Data.

Permissions Error

If you do not have the proper permissions an error message is presented.

Contacting Support

If you need assistance with an Oracle Insurance Insbridge Enterprise Rating System product, please log a Service Request using My Oracle Support at https://support.oracle.com/.

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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