

Oracle Insurance

**Insbridge Enterprise
Rating
Design Time Reporting
Document**

Release 5.6

November 2018

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 is available for the IBRM database that allows for access to the IBRM data in a relational data structure and format that can be used for reporting. The 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 to access the data, and a sample report that can be created using the available data.

Requirements for design time reporting are database server name or IP address, database user name and password. Read only permissions are required to create a connection to the design time reporting feature. Contact your system administrator to request the information.

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

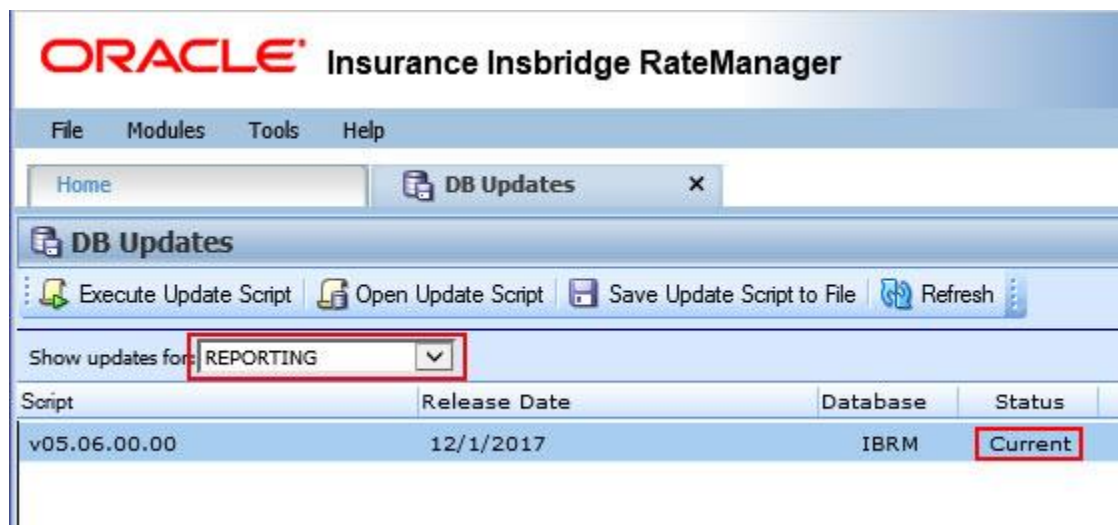
A Reporting script must be run from within the RateManager application. Running db update scripts requires admin permissions.

On the DB Updates screen, the current version is highlighted and the status is *Current*. The updates below the current version are 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 is also 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.**

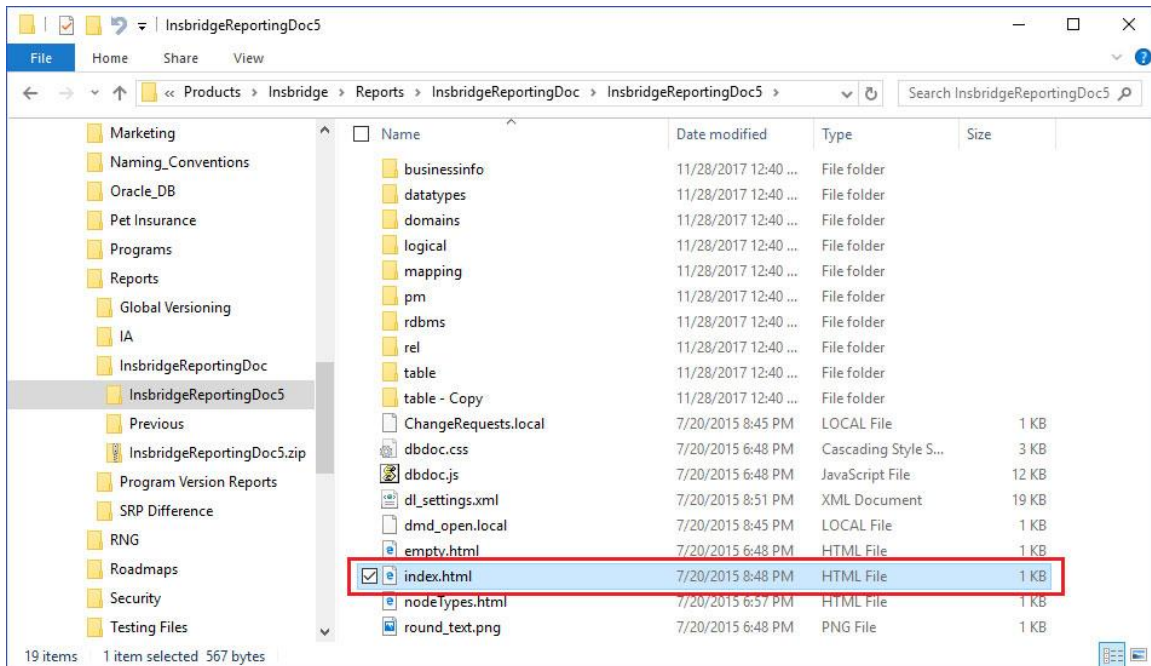


4. Click File→Reload to refresh the system.
5. Return to the Tools menu and Open Setup→Reporting Data Model
6. Click the Update Reporting Views.

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

- 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.
- Open the file and locate the Index.html file.



- Right click and Open with Internet Explorer.
- This opens the Insbridge Reporting Details screen.

The left side of the Instride Reporting Doc lists the available views.

Instride Runtime Reporting

Instride Reporting Views Data Model
A PDF of the Instride reporting views data model.

The Instride Reporting Views data model gives access to data created by the Instride Design Process.

Reporting Views Data Model

- DOMAIN TYPES
- DOMAINS
- PROJECTS
- PRODUCTS
- PROGRAM FOLDERS
- PROGRAMS
- PROGRAM VERSIONS
- NOTES
- CATEGORIES
- INSTRUCTIONS
- ALL TABLE VARS
- ALL TABLE QUALIFIERS
- TABLE VAR VIEWS
- UNIVERSAL ALGORITHMS
- UNIVERSAL CALCULATED VARS
- UNIVERSAL CONSTANTS
- UNIVERSAL FIELD VARS
- UNIVERSAL FILTER RULES
- UNIVERSAL REPORT MASTER
- UNIVERSAL RESULTS
- UNIVERSAL TABLE VARS
- UNIVERSAL TABLE VARS ACTIVE USED
- GLOBAL ALGORITHMS
- GLOBAL CALCULATED VARS
- GLOBAL CONSTANTS
- GLOBAL DRIVER ASSIGNMENT
- GLOBAL FIELD VARS
- GLOBAL FILTER RULES
- GLOBAL REPORT MASTER
- GLOBAL RESULTS
- GLOBAL TABLE VARS
- GLOBAL VERSIONING DATA
- GLOBAL VERSIONING QUALIFIERS
- GLOBAL TABLE VARS ACTIVE USED
- LOCAL ALGORITHMS
- LOCAL CALCULATED VARS
- LOCAL DRIVER ASSIGNMENT

11. The left side is the views you can select. Click a view to see what details that are presented.

The right side is the naming convention for the view.

In this example, Universal Algorithms was selected. On the right is a listing of columns and column details.

The screenshot shows the 'Insnbridge Runtime Reporting' application. The main content area displays the details for the 'UNIVERSAL_ALGORITHMS' view, which is titled 'Algorithms entered in the Insnbridge application.' Below the title is a table with the following columns: COLUMN_NAME, DATA_TYPE, NULLABLE, DATA_DEFAULT, COLUMN_ID, and COMMENTS. The table lists 16 columns with their respective data types and comments. The left sidebar shows a tree view of reporting views, with 'UNIVERSAL_ALGORITHMS' selected and highlighted in red. The footer of the application displays the copyright notice: 'Copyright © 2015, Oracle and/or its affiliates. All rights reserved.'

COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
DOMAIN_TYPE_ID	INTEGER	Yes	null	1	A unique identifier indicating the Domain Type
DOMAIN_TYPE_NAME	NVARCHAR(50)	Yes	null	2	The Domain Type Name
DOMAIN_ID	INTEGER	No	null	3	A unique identifier indicating the Domain
DOMAIN_NAME	NVARCHAR(50)	Yes	null	4	The Domain Name
PROJECT_ID	INTEGER	No	null	5	A unique identifier indicating the Project
PROJECT_NAME	NVARCHAR(50)	Yes	null	6	The Project Name
PRJ_MODEL_ID	INTEGER	No	null	7	A unique identifier indicating the Project Model
PRJ_MODEL_VER	INTEGER	No	null	8	The Project Model Version
CATEGORY_ID	INTEGER	No	null	9	A unique identifier indicating the Category
CATEGORY_NAME	NVARCHAR(50)	No	null	10	The Category Name
ALGORITHM_ID	INTEGER	No	null	11	A unique identifier indicating the Algorithm
ALGORITHM_VERSION	INTEGER	No	null	12	The Algorithm Version
INSTRUCTION_GRP_TYPE_NAME	NVARCHAR(75)	Yes	null	13	The Instruction Grp Type Name
ALGORITHM_NAME	NVARCHAR(50)	No	null	14	The Algorithm Name
SUB_TYPE	INTEGER	No	null	15	The Sub Type
DATE_LAST_MODIFIED	SMALLDATETIME	Yes	null	16	The Date Last Modified

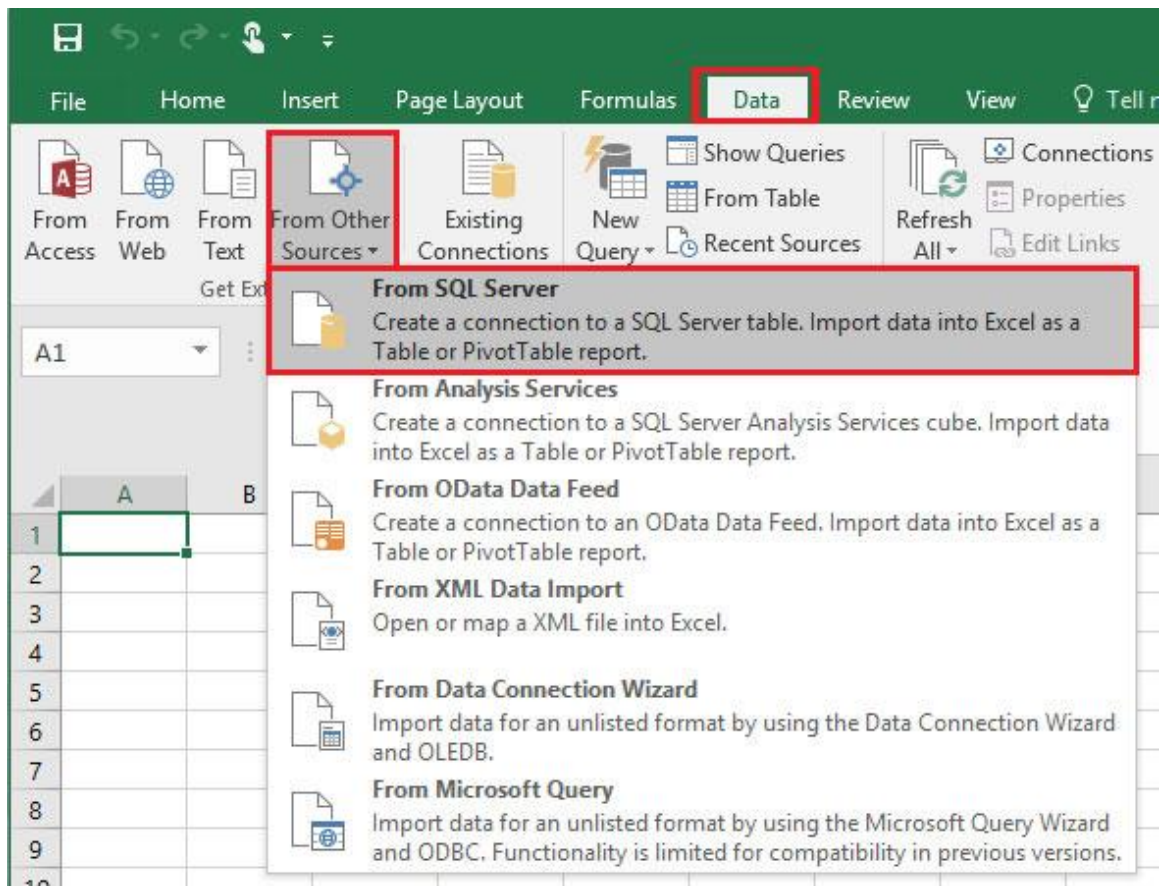
12. You can leave this screen open while you work with the data. It is a good reference.

13. Close the screen when you are finished.

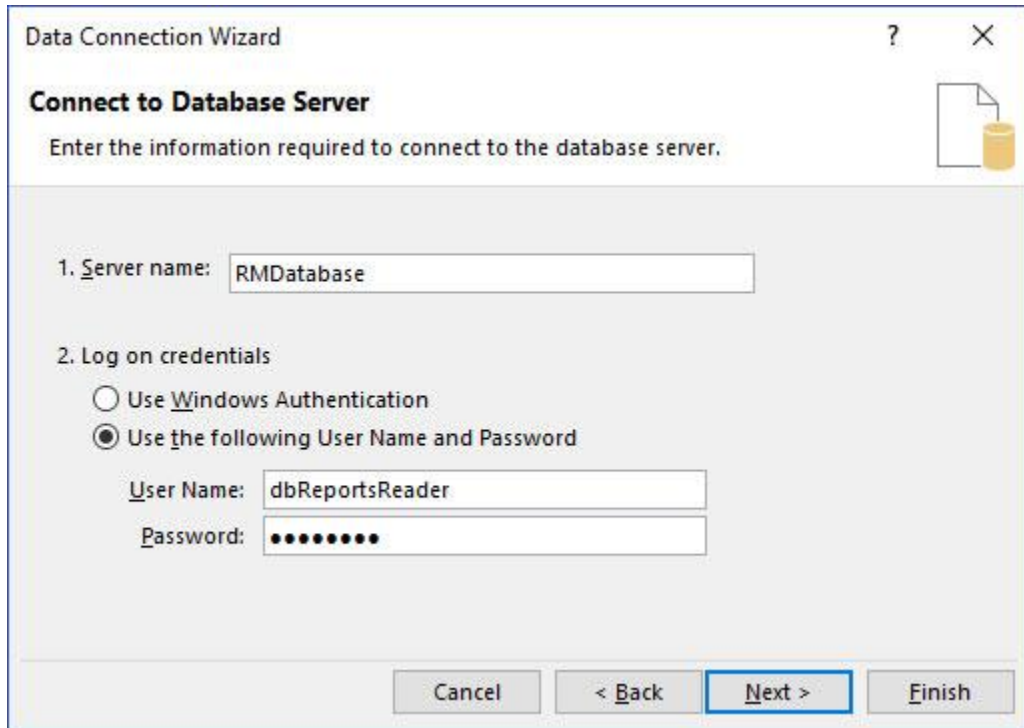
Setting Up a Connection to SQL Server Example

Setting up a connection to SQL Server requires a database name or IP address, a database user ID and password. Read only permissions are required to create a connection to the design time reporting feature. Contact your system administrator to obtain this information. In this example, a database user dbReportsReader is used.

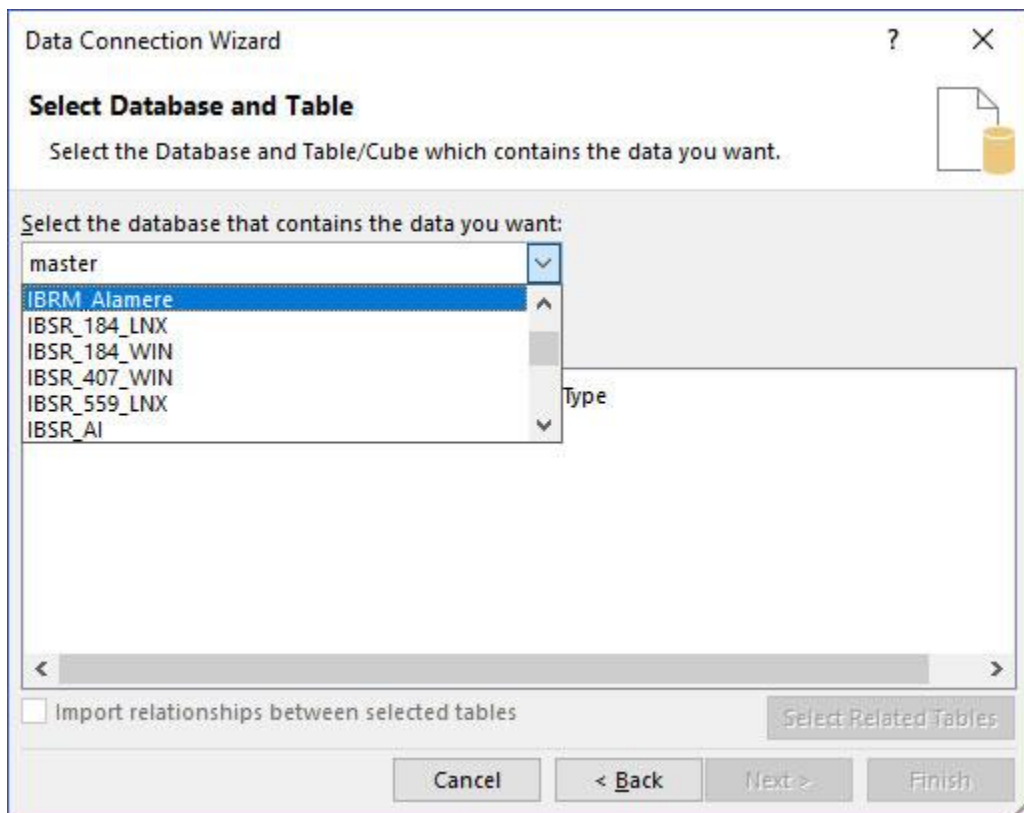
1. In Excel, select the Data tab.
2. In the Get External Data section, select From Other Sources.
3. Select From SQL Server.



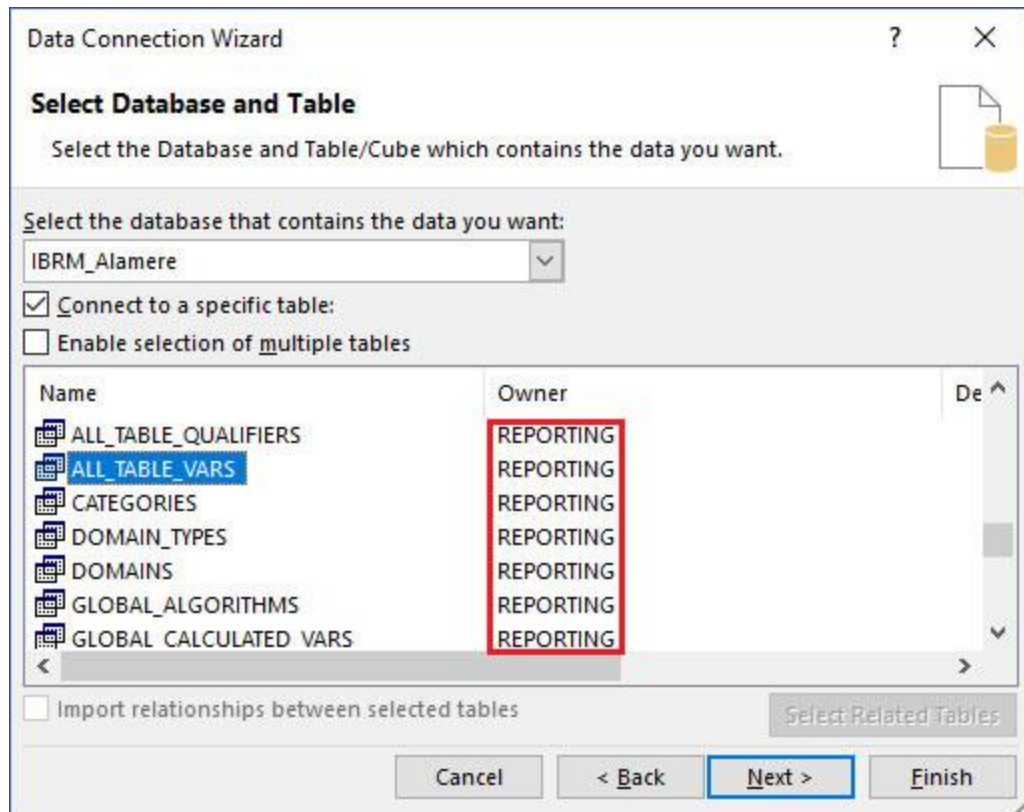
4. Enter the server name and your database credentials. You must have at least read-only access. If you do not have this information, ask your system administrator.



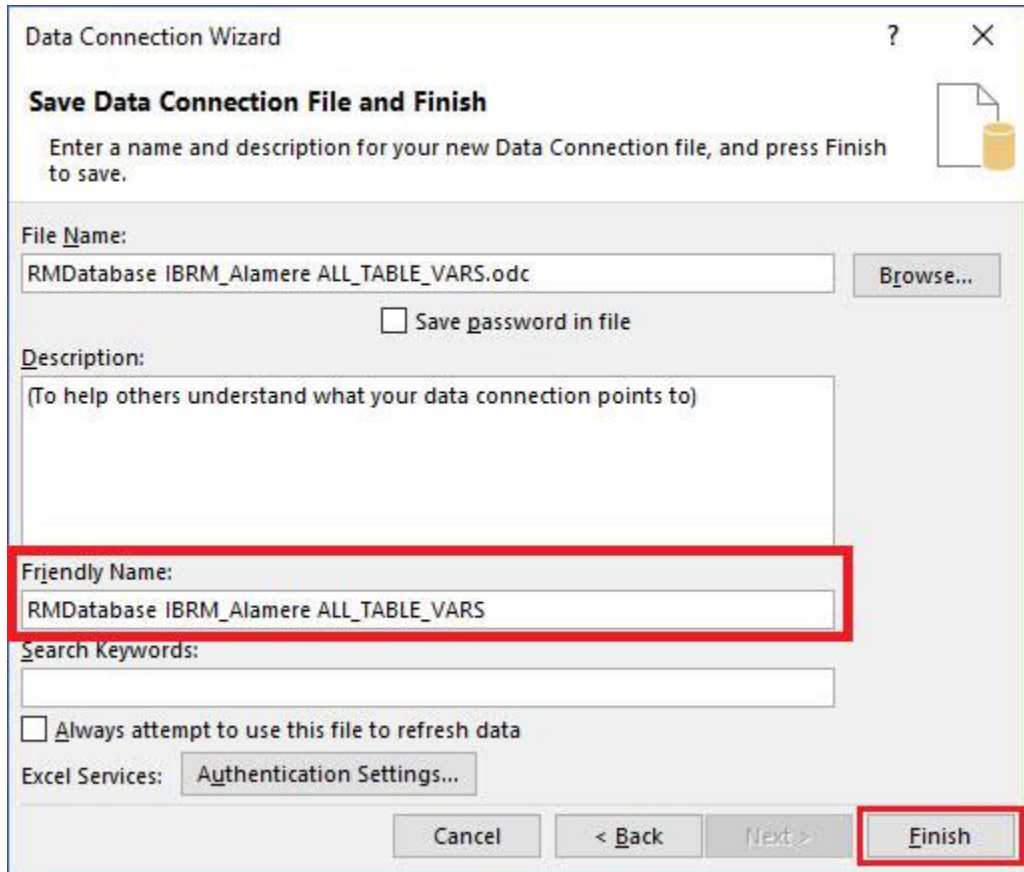
5. Click Next.



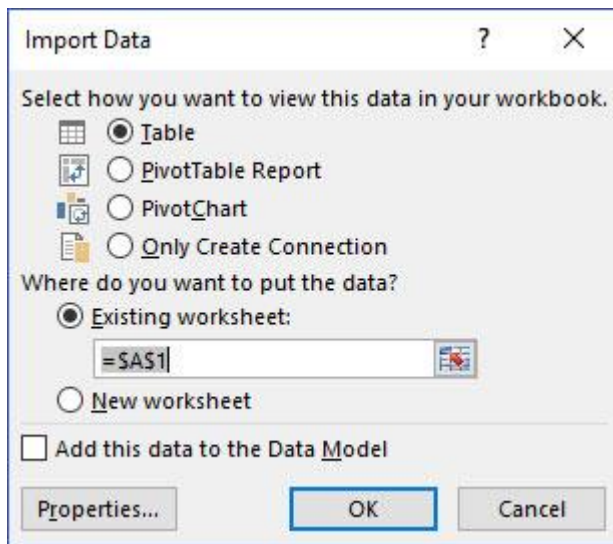
6. Select the IBRM database. Be aware that all available tables are listed. You may have to scroll to see the RM database.
7. Select Connect to a specific table and click Next.



8. Select the table that contains the data that you want to view. The Owner must be **REPORTING**. These are the design time reporting views available.
9. Clicking Next allows for the connection to be saved.



10. The friendly name can be updated. Click Finish to download the data to your local machine.
11. Select how you want to view the data.

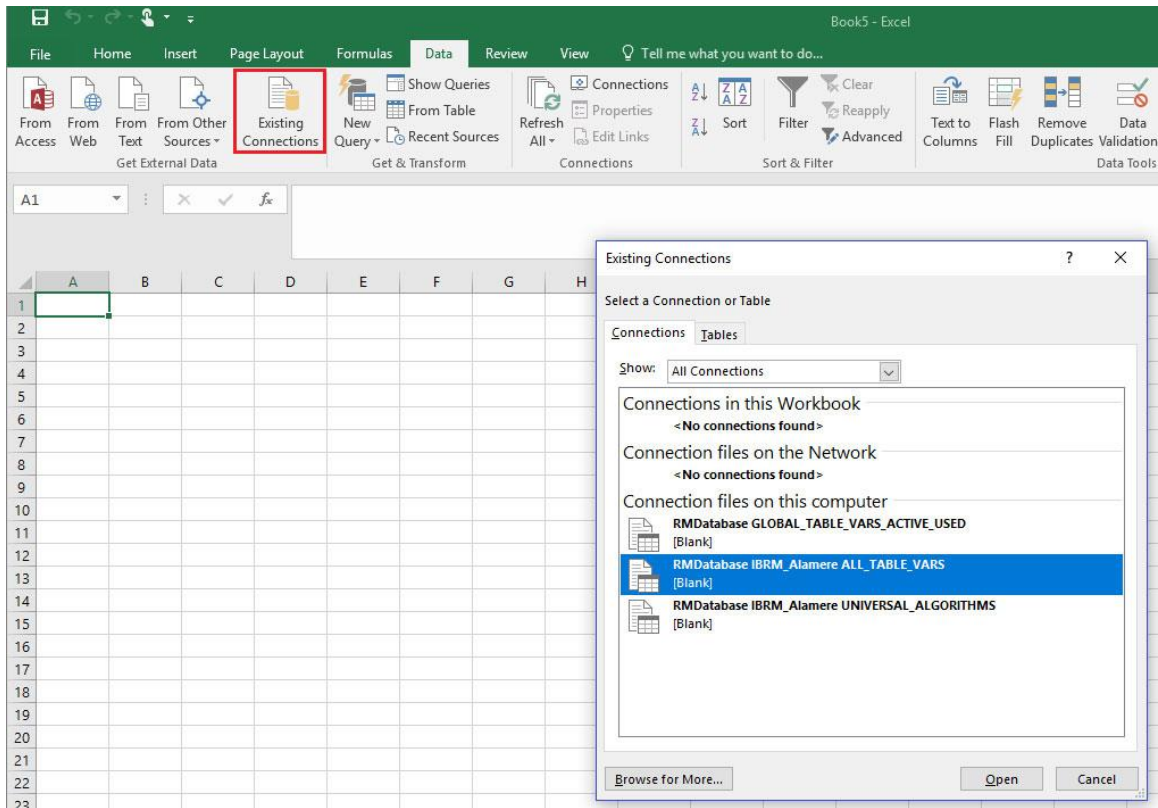


12. The data is presented in the spreadsheet. This data can be shared and manipulated as needed. Algorithms have steps presented in a readable format.

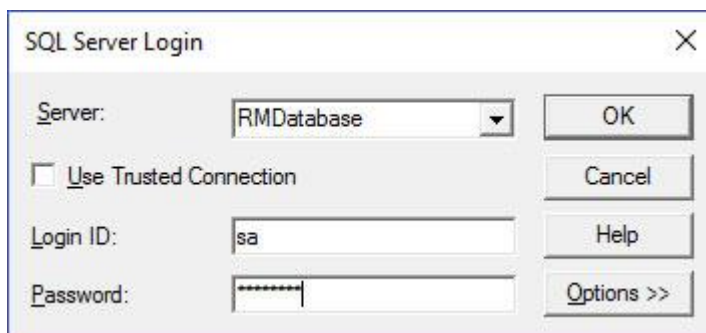
Accessing a Saved Connections

A saved connection saves the database information. The data presented is the latest data.

1. A saved connection can be found in the Get External Data section, select Existing Connections.



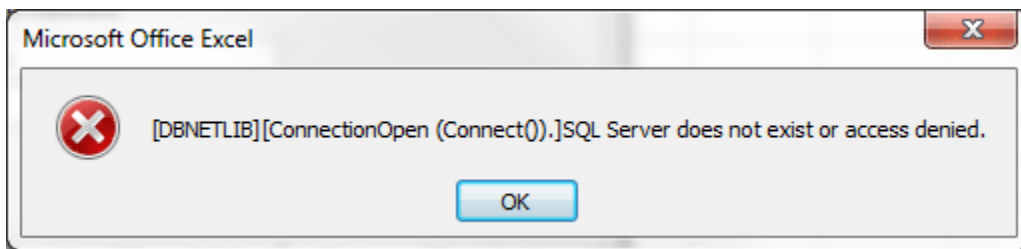
2. Select the connection you want.
3. Select the presentation format.
4. You may be required to log in again.



5. Data is presented and can be manipulated and saved.

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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