

Symphony Automate

Custom Excel functions, governed Python scripts and a managed editor — so spreadsheets become repeatable, auditable processes

Symphony Automate gives the actuarial team a governed place to run the repeatable work that used to live in fragile spreadsheets and personal scripts. Excel users discover and run approved Python scripts, see results staged back into their workbook before they overwrite anything, and use a library of custom Excel functions that streamline day-to-day actuarial work. Power users get a per-person editor in the browser. Everything runs under one entitlement model, with audit trail by default.

MANAGED SCRIPTS

- A governed catalogue of approved Python scripts the team can discover and run
- Visibility levels: private, team, shared — only what each user is entitled to
- Run immediately, or queued for long jobs with retries
- Every run is audited — who, what, when, with what inputs

BROWSER EDITOR

- A familiar VS Code editor in the browser, per user
- Each user's workspace is properly isolated from the next
- Personal, shared, network and Git-backed folders depending on entitlements
- Python pre-configured, ready to write or adapt scripts

EXCEL OUTPUT

- Scripts stage their output for the user to review before it lands in the workbook
- Output Monitor in the task pane — user clicks Write to Excel when ready
- No surprise overwrites; the actuary stays in control
- CSV download fallback if the user prefers

WORKBOOK FUNCTIONS

- Custom Excel functions that streamline actuarial work
- Parse structured data, validate inputs, summarise columns
- Generate period keys for reporting cycles, with fiscal-year support
- Quality-of-life helpers that turn fragile spreadsheets into governed ones

TASKS & AI ASSISTANT

- Schedule recurring tasks with runs, events and progress visible to the team
- Integrates with the workflow orchestrators you already operate, when needed
- AI Assistant prepares governed task briefs for approved AI providers
- AI never edits the workbook silently — every output is reviewed first

ENTERPRISE

- Logs in through your enterprise identity provider, with role-aware access
- Policy, secrets, adapters and audit log managed centrally
- Git integration for teams who version their scripts
- Email notifications and a vetted Python package list

Architecture Highlights

Comprehensive API and background jobs

A comprehensive API surface covers scripts, the editor, output staging, tasks, Git, identity, the AI assistant and enterprise admin. Long-running jobs are handled gracefully: queued by priority, retried on failure, bounded by time limits, named on-call. Scheduled background jobs refresh statistics and clean up old runs.

Editor and source governance

Each user gets their own browser-based editor session with proper filesystem isolation. The platform decides which folders, repositories and network locations each user is entitled to. Required extensions and the Python interpreter are configured centrally — no setup needed by the user.

Entitlements, audit and AI handoff

One entitlement model gates every script, source, admin action and editor session. Policy, secrets, adapter configuration, notification templates and the audit log all live in a single managed location. The AI Assistant prepares governed task briefs for approved AI providers — Copilot, Codex, Azure OpenAI or a compatible endpoint — without embedding an unofficial chat client.

Excel integration

Modern Excel add-in plus a library of custom Excel functions that streamline actuarial work — parsing structured data, validating inputs, summarising columns, generating period keys for reporting cycles, and other quality-of-life helpers that turn fragile spreadsheets into governed ones. Script results stage in the task pane so the user reviews them before they touch the workbook.

Deployment

Ships as a containerised stack you can run on your cloud, on-premise, or under a managed SLA. Health-checked and restart-resilient. Excel-first, web, API — same data through any access path. No licence lock-in — the client owns the scripts, the workspaces and the deployment.

Contact Us

To learn more, please contact our team
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Data Symphony

We are proudly BEE Level 1 Services Provider in South Africa.

Our team

- Qualified Actuaries (FASSA, CERA)
- Credit Modelling Specialists
- Data Scientists, Engineers and Analysts