

Symphony Reporting

An IFRS 17 reporting workflow that runs inside Excel — with versioning, validation and variance built in

Symphony Reporting is the tool the reporting team runs the cycle from — without leaving Excel. A modern Excel add-in drives the full workflow: pull a versioned data set, edit in the familiar grid, validate against the rules, compare to a prior version, push back with a sign-off, and export. Built for IFRS 17 first, with versioned data sets, segment submission dashboards, multi-table comparison, and live progress as each step runs.

EXCEL TASK PANE

- Modern Excel add-in, built on the same technology Microsoft uses for first-party Office apps
- Ribbon buttons for every step of the reporting cycle
- Setup, pull, validate, compare, push and export — all from inside Excel
- Live progress updates so the user can see what each step is doing

VALIDATION

- Validate inputs against typed rules with friendly error messages
- Numeric ranges, allowed values, date formats and required fields
- Per-cell feedback written straight back to the Excel range
- Rule library managed centrally per table set

PULL / PUSH / DELETE

- Pull by cohort, product, source system or version
- Push edited ranges back with a new version and a sign-off
- Delete, clone and bulk-clone tables when needed
- Segment-aware: users only see their own segment

COMPARE & EXPORT

- Compare two versions of a table and see exactly what changed
- Multi-table comparison across versions with detailed diff output
- Bulk export to network shares and managed export flows
- Segment submission dashboard tracks who has submitted what

ENTERPRISE LOGIN

- Logs in through your enterprise identity provider, with role-aware access
- Permissions resolved per user across Reporting, Modelling, Automate and Assumptions
- Segment-based access control on every pull and push
- Login and key actions audited by default

MULTI-DATABASE

- Works with the databases you already operate (PostgreSQL, SQL Server, MySQL)
- Separate connections for dev, QA, UAT, staging and production
- Network drive and shared-folder support for CSV ingest and export
- Caching for fast repeat reads

Architecture Highlights

Excel-first reporting workflow

The reporting team runs the IFRS 17 cycle from inside Excel — the tool they already use. The add-in drives every step: pull, validate, compare, push, sign off and export. Excel ranges round-trip cleanly back to the platform, with full audit trail.

Validation, comparison and versioning

Validate inputs against typed rules with friendly error messages — numeric ranges, allowed values, required fields, date formats. Compare two versions of a table and see exactly what changed: added rows, deleted rows, modified rows, column differences. Every dataset is versioned with a sign-off trail.

Identity, security and audit

Logs in through your enterprise identity provider, with role-aware access. Segment-based row scoping means each team only sees their own data. Logins, pulls, pushes and key actions are audited by default.

Database and storage

Works with the databases you already operate — PostgreSQL, SQL Server, MySQL — with separate connections for dev, QA, UAT, staging and production. Network drive and shared-folder support for CSV ingest, export and shared writes.

Deployment

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