

**Case Study proposals, CURA grant
Insurance Corporation of British Columbia**

Evelyn McLellan, October 30, 2006

Proposal 1: On-line Autoplan Manual

The Autoplan Manual is produced by the Insurance Procedures and Business Change Division in the Insurance Planning Department of ICBC and is intended to serve as instructions to Autoplan brokers selling basic and optional insurance to BC drivers. The on-line Autoplan Manual was first produced in 2002 as a replacement for the print version of the Manual. The Manual, which contains highly detailed instructions, is made available to brokers through the Autoplan Extranet, a website that serves to process all broker transactions and interactions with ICBC. The Manual is the only record of instructions issued by Insurance Planning to ICBC brokers, and thus has ongoing legal, administrative and historical value to the organization.

The Manual is updated and reissued approximately 20 times per year. With each update, the obsolete version is transferred in its entirety to the custody of the digital archives. E-mail notices outlining the changes made are sent to the archives from Insurance Planning, and these notices are kept as part of the transfer documentation. The archives currently holds about 8 GB of the Manuals, which consist of objects in the the following formats: html, cascading stylesheet, javascript, gif, PDF and macromedia flash. The e-mailed change notices are saved in rich text format.

The digital archives currently has no preservation strategies in place for the manuals. Since the earliest manuals are now 4 years old this is becoming a matter of concern, particularly given that they include a number of different file formats, as described above. In addition, it may be useful to consider means by which only the changed content could be transferred to the digital archives, rather than entire manuals, to reduce future storage requirements. This would require the establishment of some means of reproducing the entire manual for a given date based on the latest available content for that date.

Draft timeline:

Data collection: July-December 2007

Testing solutions: January-December 2008

Refining solutions: January-December 2009

Proposal 2: Data Warehouse

The Data Warehouse is an enterprise-wide data acquisition and distribution system designed to be the official source of data for reporting across ICBC. The Warehouse consists of a database of information extracted from a large number of local and departmental systems covering insurance transactions, claims handling, licensing operations and other major functions carried out by the Corporation. The extracted data are aggregated into reports in the Object Management Services (OMS) environment, mainly through the use of Crystal Reports, and made available to the end user through a web interface. The reports are used to support ICBC staff and agents as they conduct the business of selling insurance, handling claims, implementing road safety programs, licensing vehicles and drivers, and other activities.

The reports may be created either by an automated extraction process (for example, a workflow process running daily or weekly to aggregate specific data using pre-specified criteria) or on the fly when end users enter search parameters based on immediate business needs. The reports may contain embedded objects which are typically other reports aggregating data from other parts of the database. This is known as “drill-down” functionality, with reports being nested within reports (up to six or seven layers). Some reports are saved within the system as discrete report files; others are exported in various formats, including Excel, RTF and PDF, although these formats may provide the end user with limited functionality. Other reports are not saved and simply disappear when the user exits the system. Data in the underlying Oracle database are typically overwritten when updates are made; according to the system administrator, the Crystal Reports are the means by which data are captured and saved for future use. Data in the originating systems are also overwritten as they are updated.

The Corporation would like to be able to preserve the reports to support future business activities. Currently the reports that are saved reside in the OMS, but future software upgrades will make it likely that staff will no longer be able to retrieve or view older reports in the not-too-distant future.

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