

# LeanApps Life

User group session

Amsterdam, September 26, 2024

# Agenda

Keeping up with market and industry developments

- ⚡ Keylane strategic themes 2025-2030
- ⚡ Short term roadmap
- ⚡ Long term roadmap
- ⚡ Business continuity actions
- ⚡ Demo workflow in LeanApps Life

# Keylane Strategic themes 2025-2030

Strategies for future success and value creation

<b>Legislation &amp; Compliance</b>	Our products have features that enables our customers to comply to legislation and compliance.
<b>Product expansion</b>	Extension of our products with new feature domains to increase the potential of our products for new and existing customers.
<b>Business continuity</b>	Our products and services come with features that ensure our customers can continue operations. We implement features that support the continuity of our own operations.
<b>Business effectiveness</b>	Our products have features that enables our customers to increase productivity operations.
<b>Digital experience</b>	Our products offer advanced features that enable our customers' clients to process and communicate more effectively through digital channels.

# Keylane Strategic themes 2025-2030

## Legislation & Compliance

- ⚡ GDPR
- ⚡ AML
- ⚡ Localised compliance
- ⚡ Tax reporting
- ⚡ Pension treaty WTP (NL)
- ⚡ DORA

## Product Expansion

- ⚡ Disbursement
- ⚡ Financial reporting
- ⚡ Workflow management
- ⚡ Multi-client
- ⚡ Modularised implementation
- ⚡ Investments/ portfolio management
- ⚡ Output management/ external DMS
- ⚡ Real time model

## Business Continuity

- ⚡ Cyber security
- ⚡ SaaS/cloud
- ⚡ Data lifecycle management
- ⚡ Containerisation
- ⚡ Enable frequent releases/testability
- ⚡ Product integration repository
- ⚡ Performance and scalability

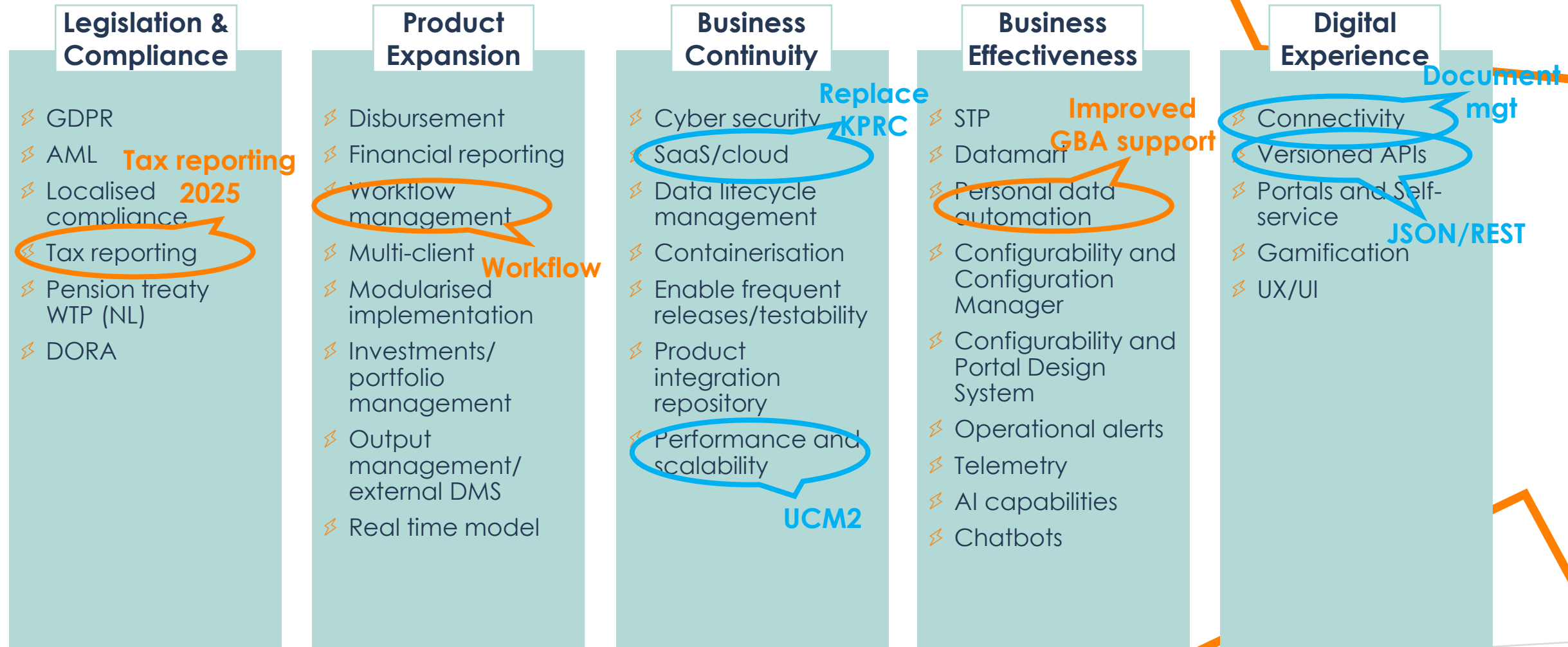
## Business Effectiveness

- ⚡ STP
- ⚡ Datamart
- ⚡ Personal data automation
- ⚡ Configurability and Configuration Manager
- ⚡ Configurability and Portal Design System
- ⚡ Operational alerts
- ⚡ Telemetry
- ⚡ AI capabilities
- ⚡ Chatbots

## Digital Experience

- ⚡ Connectivity
- ⚡ Versioned APIs
- ⚡ Portals and Self-service
- ⚡ Gamification
- ⚡ UX/UI

# Keylane Strategic themes 2025-2030







# Short term roadmap

# Short term roadmap

## Topics

- ⚡ Legal changes - tax reporting 2025
- ⚡ Improved GBA support
- ⚡ Workflow

# Short term roadmap

## Legal changes – tax reporting 2025

- ⚡ Change in monthly tax reporting SCH&SUC:
  - Add actual receivers
  - Add indication FI (Financial Institution)
    - Based upon pledge holder
  - Update list of AEOI (=CRS) countries
  
- ⚡ Administration of receivers:
  - Either: use of technical interface ('QIS Portal coupled').
    - Possibility to administer in hinsight;
  - Or: administer actual receiver upon termination in LALife

**Death**

BPY64\_001/1/2 Request for termination due to death  
The insured, premium payer, policyholder E.M. EMPLOYEE\_00\_001 born on 01/01/1975 is deceased on 25/12/2009.

Date \* 25/12/2009  
Amount \* 125,000.00 €  
Correction 0.00 €  
Payment distribution \* Percentage

Receiver	Percentage	Payment method	Bank account	Payment description
P.A. PARTNER_1_EMPLOYEE_00_001	75.00	Money transfer	2222001	
A.R.T. Person.001	25.00	Money transfer	1793266	

Select receiver

Ok Cancel



# Short term roadmap

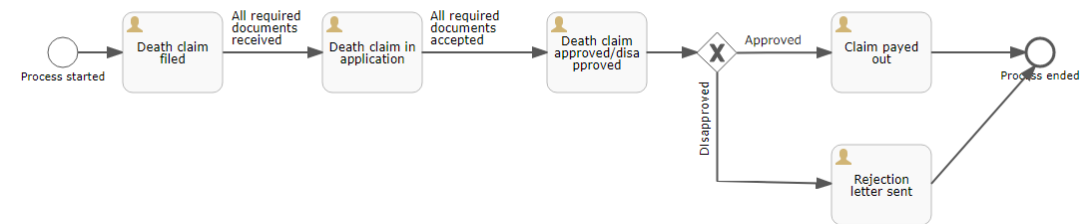
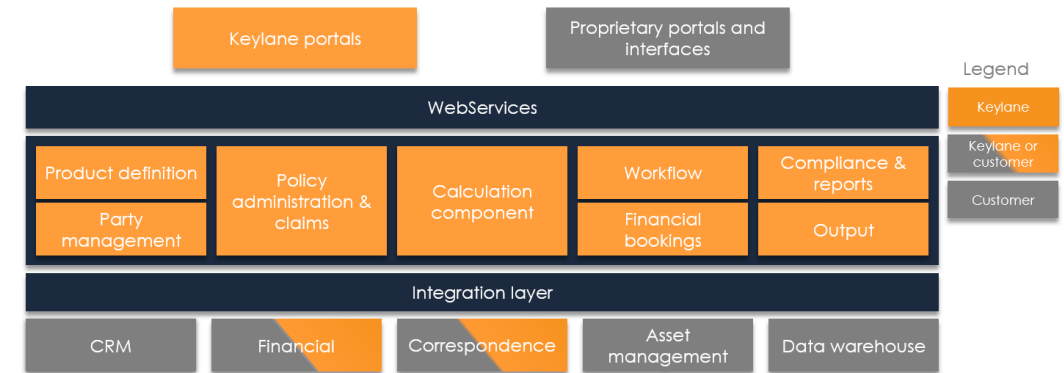
## Improved GBA support

- ⚡ Changes in party trigger automatic participation changes:
  - Marriage
  - Divorce
  - Child birth
- ⚡ Name designation
- ⚡ Connection with tasks / workflow
- ⚡ Different subsets of GBA fields
  - Pension companies get more info than insurance companies

# Short term roadmap

## Workflow

- ⚡ Open Source tooling Flowable
- ⚡ Connected to LeanApps Life using:
  - REST-services
  - the task mechanism in LeanApps Life
- ⚡ Flows are specific per organisation
  - General examples available as a basis for finetuning
- ⚡ Easy to configure





# Long term roadmap

# Long term roadmap

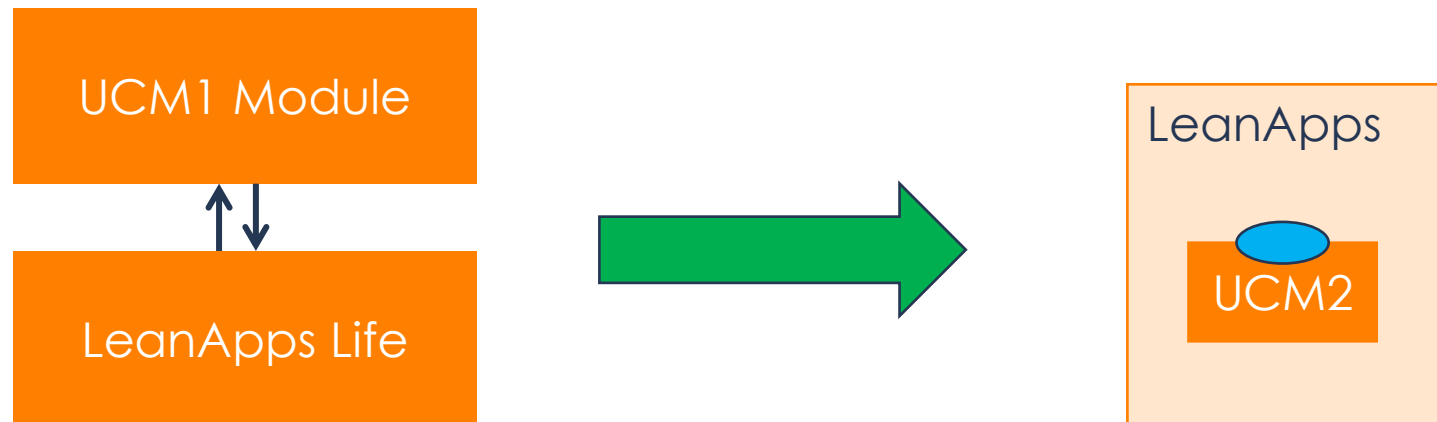
## Topics

- ⚡ UCM2 in LeanApps Life
- ⚡ Replace/rebuild KPRC
- ⚡ JSON versus XML
- ⚡ REST-services gradually replacing webservice
- ⚡ Document management system

# Long term roadmap

## UCM2

- ⚡ UCM2 calculates in milliseconds i.s.o. seconds
- ⚡ UCM2 is library; to be integrated into LeanApps Life
  - Single source of truth for product configuration
  - Upload functionality for DNB sheet in LALife



# Long term roadmap

## Replace / rebuild KPRC

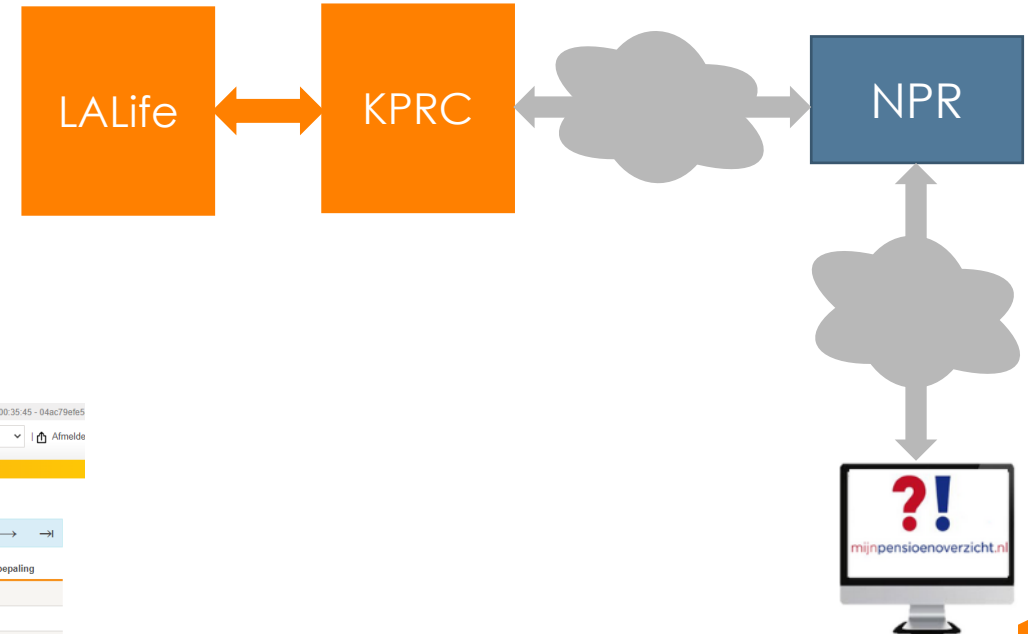
⚡ Replace Axon platform with off-the-shelf technology:

- Spring boot
- Spring Batch
- React-js / vue-js

⚡ Redesign current GUI:

The screenshot shows the Keylane web application interface. The header includes the Keylane logo and navigation tabs: AANSPRAKEN, MIJN PENSIOENOVERZICHT, CONFIGURATIE, and OVERIG. The main content area is titled 'Beheren pensioenrechten' and contains a search form with fields for 'Burgerservicenummer' and 'Status' (set to 'Actueel'). Below the search form is a table with the following data:

Deelname	Verzekeringsmaatschappij	Pensioen administrateur	Burgerservicenummer	Datum van bepaling
NPR_PART_00_019	abcde	A0090	001190003	01-12-2011
NPR_PART_00_003	abcde	A0090	003030003	01-12-2011
NPR_PART_00_007	abcde	A0090	007070007	01-12-2011
NPR_PART_00_009	abcde	A0090	009090009	01-12-2011
NPR_PART_00_011	abcde	A0090	001110007	01-12-2011
NPR_PART_00_013	abcde	A0090	001130006	01-12-2011
NPR_PART_00_015	abcde	A0090	001150005	01-12-2011
NPR_PART_00_017	abcde	A0090	001170004	01-12-2011
NPR_PART_00_022	abcde	A0090	002220003	01-12-2011
NPR_PART_00_024	abcde	A0090	002240002	01-12-2011
NPR_PART_00_006	abcde	A0090	006060006	01-12-2011



# Long term roadmap

## JSON versus XML

- ⚡ JSON is taking over XML as a standard for intercompany messaging
  - Many similarities but some striking differences
- ⚡ Advantages:
  - Easier to read
  - Faster
  - No parser required
- ⚡ Disadvantages
  - No parser means no check on validity (xsd in XML)
- ⚡ Roadmap LeanApps Life
  - Gradually introduce JSON, maybe replacing XML
  - Taking the ecosystem into account: the sender / receiver has to be ready!

### JSON Example

```
{ "employees": [
  { "firstName": "John", "lastName": "Doe" },
  { "firstName": "Anna", "lastName": "Smith" },
  { "firstName": "Peter", "lastName": "Jones" }
]}
```

### XML Example

```
<employees>
  <employee>
    <firstName>John</firstName> <lastName>Doe</lastName>
  </employee>
  <employee>
    <firstName>Anna</firstName> <lastName>Smith</lastName>
  </employee>
  <employee>
    <firstName>Peter</firstName> <lastName>Jones</lastName>
  </employee>
</employees>
```



# Long term roadmap

## REST-services gradually replacing webservices

- ⚡ REST-services are dedicated, smaller webservices
  - Few input fields, few output fields
- ⚡ Advantages:
  - Easier to use
  - Smaller chance on design & development errors
  - Faster
- ⚡ Disadvantages
  - More smaller REST-service calls are required than one big webservice call to obtain the same result

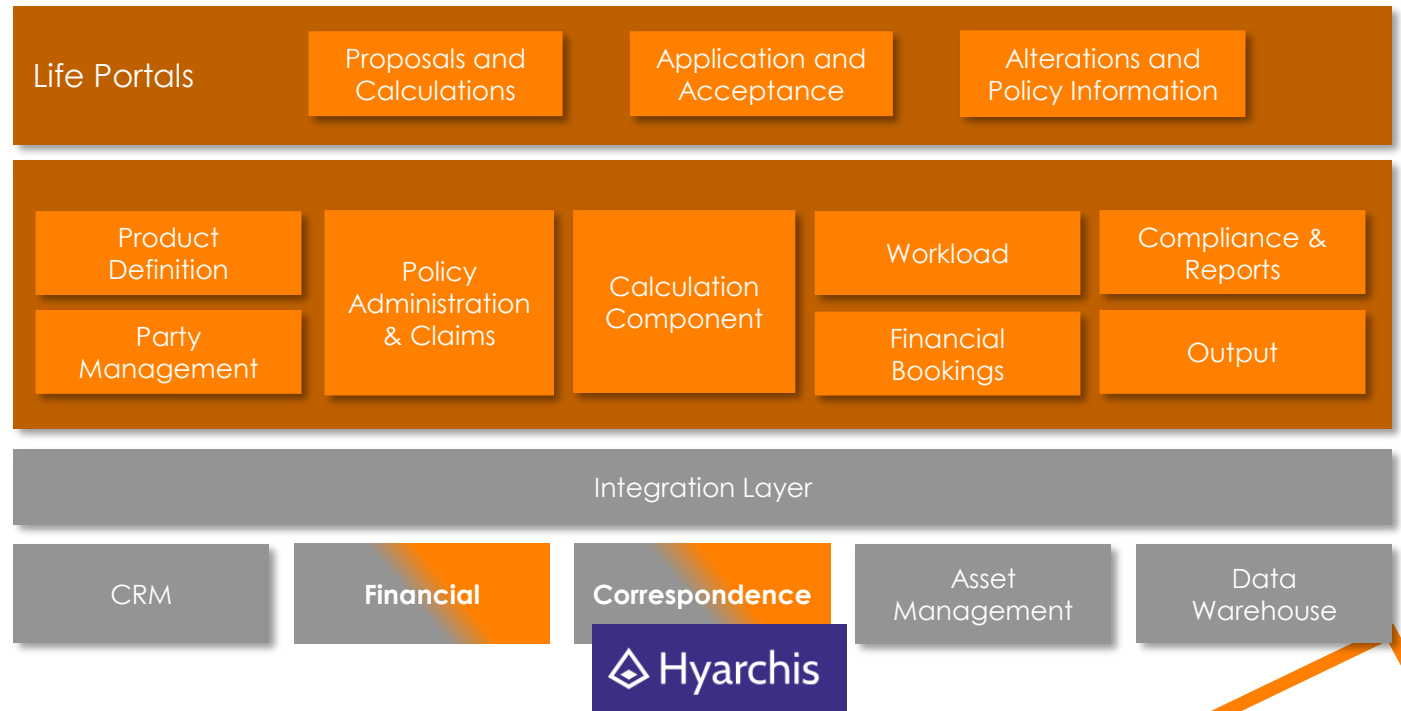
# Long term roadmap

## Document management system

⚡ Interface with external document management system

⚡ Added functionality:

- Access rights
- Search capability
- Data integrity
- AVG proof



Hyarchis specializes in:



Hypotheeken



Accountancy



Banking



Verzekeringen



Finance

# Coffee break





# Business continuity actions

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## Topics

- ⚡ Performance
- ⚡ Technical upgrades
- ⚡ Maintain and upgrade test automation

# Business continuity actions

## Performance

- ⚡ Measure on production like situation
- ⚡ Cleanup historic data
  - Are account entries on historic versions still relevant after 10 years?
- ⚡ Asynchronous document generation ('detach itp')
- ⚡ UCM2

# Business continuity actions

## Technical upgrades

- ⚡ WebLogic 14.2 & Java 17/21
- ⚡ Library upgrades
- ⚡ Pentesting
- ⚡ New hosting provider



# Business continuity actions

## Maintain and upgrade test automation

- ⚡ Bugshot → Bugshot Pro
- ⚡ TestLink → TestRail
- ⚡ Regular updates of 'holy grail' databases

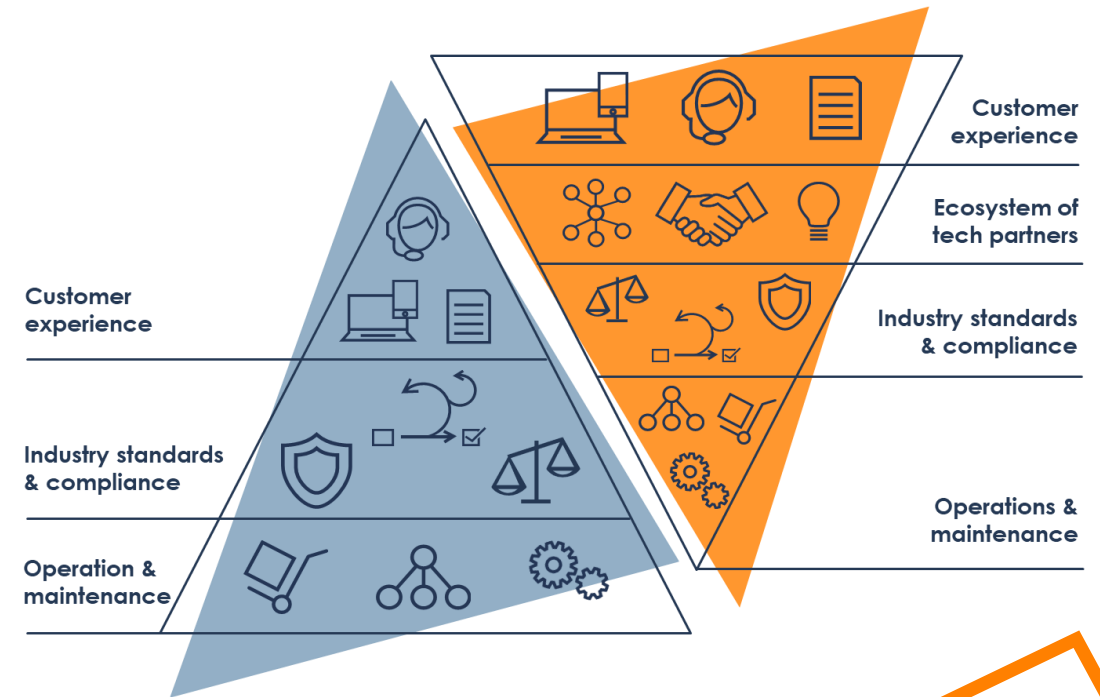


# Workflow in LeanApps Life

# Service concept philosophy

## Straight Through Processing wherever possible

- ⚡ **Portals** for all customers (business & retail)
  - Both transactions and overview of customer data
  - Keylane and/or proprietary portals are both supported
- ⚡ Professional parties can access through **open interfaces**
  - Webservices and REST-services
  - Parties like salary processing firms
- ⚡ **Direct interfaces** with data delivery parties
  - Government and other regulatory parties
- ⚡ Regular end users use the **workflow**
  - Guiding the user through all steps of the process
  - Less options = less room for errors
- ⚡ Only highly skilled Super Users will use the **GUI**
  - Complex cases
  - Product configuration activities







Demo

 Keylane

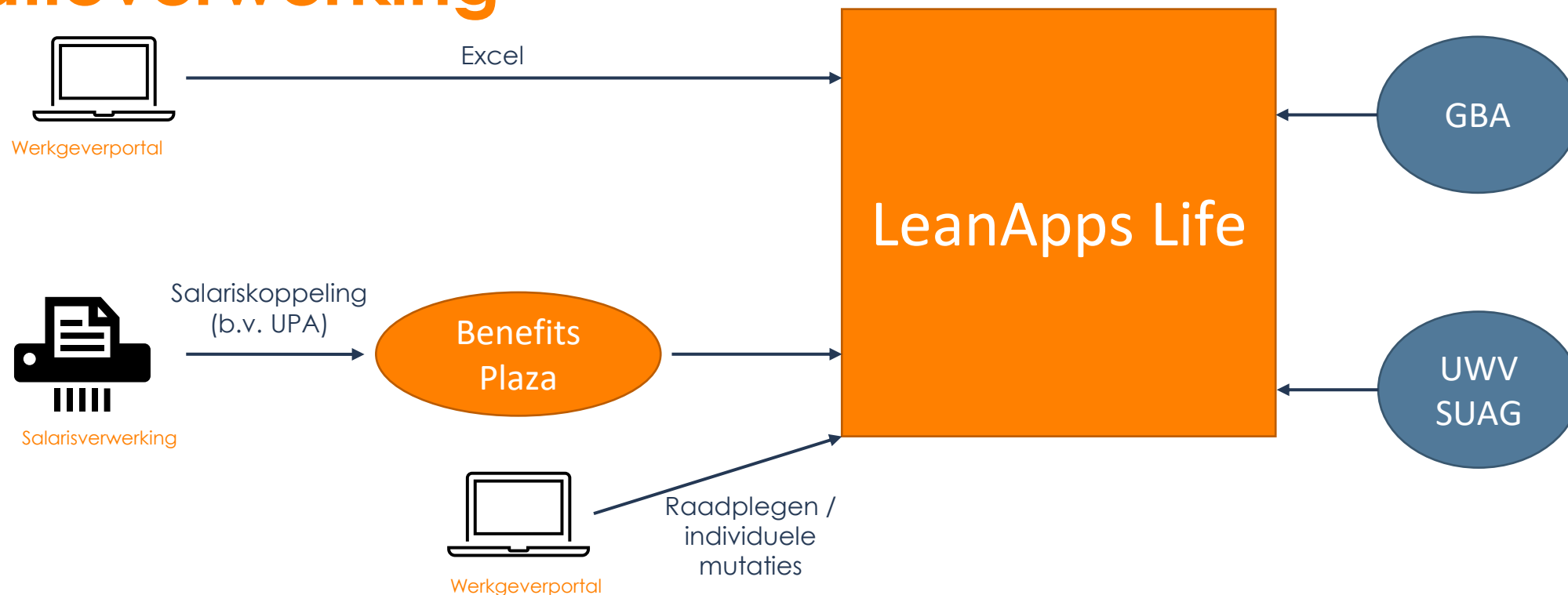
# Questions & Answers





Keylane

# Mogelijke reserveslide: Mutatieverwerking



- ⚡ Aansluiting vooral voor Corporates op salarisverwerking waar alle relevante bulkmutaties (salaris, in dienst, uit dienst, etc.) ook al in staan
- ⚡ SME kan desgewenst ook salariskoppelingen gebruiken. Bij Corporates ligt aanlevering van mutaties via een Excel-bestand niet voor de hand
- ⚡ Niet dienstverband gerelateerde mutaties gaan via GBA (overlijden, echtscheiding, adres, etc.) en UWV (AO)
- ⚡ Optionele modules incl. aanmelden geregistreerd partnerschap via werknemerportaal