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Kreditdossier Document Management Application
for **llb** 1861

Summary

The "Kreditdossier" application, developed for LLB, is a specialized tool designed exclusively for managing documents related to loans. This application is tailored to assist bank clerks in handling, storing, and accessing all documents associated with clients and specific loan cases.

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Key Features

INTEGRATION WITH AVALOQ: The application interfaces with the bank's Avaloq financial management solution, retrieving relevant client and case details, which aids in organizing and associating documents accurately.

SEAMLESS DOCUMENT MANAGEMENT SYSTEM CONNECTIVITY: "Kreditdossier" integrates with the bank's existing document management system, ensuring secure and efficient storage and retrieval of loan-related documents.

UNIFIED USER INTERFACE: It offers a single, streamlined user interface for managing all documents related to clients and loan cases, greatly simplifying the document management process.

DOCUMENT TYPE MANAGEMENT: The application integrates with another OutSystems application developed for managing various document types, enhancing document categorization and retrieval efficiency.

MICROSOFT OFFICE ONLINE SERVER INTEGRATION: This integration allows in-app viewing of documents, facilitating immediate access and review without leaving the application.

ORPALIS PDF CONVERSION: "Kreditdossier" incorporates Orpalis PDF technology to convert all types of documents to PDF before storage. This ensures uniformity and compatibility across the document management system.

HUMAN-ASSISTED WORKFLOW FOR DOCUMENT CONVERSION VERIFICATION: The application includes a human-assisted workflow to validate all document conversions, ensuring accuracy and integrity before saving them in the document management system.

Outcome

The implementation of the "Kreditdossier" application has significant benefits in the document management aspect of loan processing at LLB. It has streamlined the handling of loan-related documents, increased efficiency in document access and storage, and improved overall organizational productivity. The integration with multiple systems, along with the development of a user-friendly interface, has significantly enhanced the bank clerks' ability to manage loan documents effectively and accurately.

Client

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