

Image Statements

What it is

OnBase Image Statements creates "compound statements" by taking primary documents and matching them to supporting or secondary documents for rendering using keyword and date matching criteria. Some examples where this type of relationship between document types applies are banking (where statements are joined with check images), billing (where purchase orders are linked to invoices or other slips), and insurance (where claims can be matched with field reports, estimates, etc.). Once an Image Statement is configured, it can be rendered individually on demand or in batches as part of a statement generation and distribution process.

How it works

The user defines a relationship between a primary document and secondary documents by specifying one or more common keywords and optional date-matching criteria. Once this relationship is established, document formatting can be defined. Formatting options include user specification of the print format, overlay, font, page title and sort order for both primary and secondary document output. By allowing multiple secondary documents to be printed on a page, (e.g., tags, checks, packing slips, and deposit slips), paper consumption can be minimized. Additionally, Image Statements effectively manages output by allowing OnBase to switch statement formats "on-the-fly" on a per customer basis when a different appearance and format is required for statements.

After documents are archived into OnBase and the Image Statement has been defined, users can render statements at any time. A user always has the option to render a statement "on demand" in situations where a customer request is made. Users managing large data sets often perform the rendering of statements in batches during down hours or at night, so not to affect daily production. Rendered statements may be printed, archived back into the OnBase database, or sent to the OnBase Document Distribution module for automated electronic distribution to specified groups of customers. Statements that are missing secondary documents ("crippled statements") can be identified and placed into a separate folder for subsequent exception processing by OnBase.

Who will benefit

Organizations that must routinely generate and distribute statements or reports pertaining to a central case, customer, account or transaction will benefit from the ability to link primary and supporting documents together under a single flexible presentation format. When combined with the Document Distribution module, organizations can also deliver information in a more cost effective, efficient manner.

Technical Features

- The generation of OMR and POSTNET barcodes on the documents for ease in mail processing
- The use of electronic document distribution methods (fax, CD, web posting) if the workstation is licensed for Document Distribution
- Detect crippled statements when secondary documents are determined missing from a statement and store them in a specified folder for review.

Business Benefits

- Complex statements can be generated individually "on demand" or in batches, with ease
 - Statements can be printed, archived or passed to Document Distribution automatically
- Flexible statement formatting and printing options

System Requirements

- OnBase Image Statements institution license
- Optional OnBase Document Distribution license to distribute statements via e-mail, fax, CD/DVD
- Image Statements and Document Distribution functionality are supported by the OnBase thick client and require a Client license

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