

## 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 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 document(s) by specifying one or more common keywords and optional date matching criteria. Once this relationship is established, users can define document formatting. Formatting options include 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. Other OnBase users, managing large data sets, perform the rendering of statements in batches during down hours or at night, so as 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

- Generation of OMR and POSTNET barcodes
- Electronic document distribution if licensed for Document Distribution
- Crippled statement detection
- Statements “on demand” or in batches
- Flexible statement formatting and printing options

### Business Benefits

- Reduce payment processing cycles by providing all supporting information with invoices
- Provide custom statements for customers and partners
- Reduce paper consumption
- Respond to customer information requests rapidly

### System Requirements

- OnBase Image Statements license
- COLD/ERM
- OnBase Document Distribution license for automatic distribution of rendered statements