

Document Distribution

What it is

OnBase Document Distribution maximizes the capabilities of OnBase Image Statements by managing the process of electronic delivery of statements. With OnBase Document Distribution, documents are delivered directly to the intended recipients, eliminating the need for paper, printing and postage costs. Based on a recipient's profile, OnBase can distribute the statement in TIFF, RTF or PDF format for e-mails and web postings. The system also provides the option of attaching a customized cover letter, e-mail message or promotional document to a statement.

How it works

The user defines a relationship, between a primary document and secondary documents with a common keyword value. Once the relation is established, the statement format is set up. Recipients are then defined, each with their desired document distribution method. Based on the unique keyword assigned to each statement, OnBase determines whether the statement is to be faxed, e-mailed, distributed to a web site, burned to a CD or any combination of options.

If the delivery is unsuccessful, the system can attempt to re-send e-mails and faxes for a specified number of times before it notifies a process manager. A user always has the option to distribute *ad-hoc* in any given situation. Users managing large data sets can opt to schedule distribution during down hours or at night so as not to affect daily production.

Who will benefit

Anyone who has the OnBase Image Statements module and is looking for a variety of delivery options for the rendered statements will benefit from this module. In addition, customers who need to automate the distribution of reports, statements or other documents to groups of recipients in different delivery formats will benefit from the Document Distribution module.

Technical Features

- Scheduled "hands-off" mailings and statement cycles.
- Distribution via fax, e-mail, web or CD.
- TIFF, RTF and PDF distribution file formats.
- Web delivery e-mail notifications after posting to sender website.
- Template cover pages for e-marketing and notifications.
- Exception handling queues.

Business Benefits

- Faster, more efficient information delivery.
- Reduced mailing, printing and postage costs.
- Value-added customer account profile options and benefits.

System Requirements

- Document Distribution workstation license
- Image Statements institution license is required for rendering and distribution of multi-document (primary plus secondary) statements
- Document Distribution functionality is supported by the OnBase thick client and requires a Client license