

## Exception Reports

### What It Is

OnBase Exception Reports recognizes relationships between a base document type and one or more secondary document types and generates reports on missing, matching or aged items. The OnBase Exception Reporting module allows users to create reports based on a keyword relationship between document types. The reporting capability queries the OnBase database for keywords found on one document type to validate the presence of complementary document types with the same keyword information. Any absent documents or keyword discrepancies are reported to the user. This allows the user to be alerted to documents that are expected, but are not present, in the OnBase system. The power and flexibility of this module allows it to handle anything from expense reports and their related receipts, to more complicated document requirements such as loan processing and medical records management.

### How It Works

There are two types of Exception Reports available within the OnBase system: Basic Exception Reports and Advanced Exception Reports. Basic Exception Reports can indicate a missing secondary document relating to a primary document, or vice versa (a one-to-one relationship). For example, a shipping company decides to track shipping labels to determine the receipt of packages. There are two document types: shipping labels (primary) and receipts (secondary). The unique matching keyword found on both documents is the shipment number. If 100 packages were shipped with their respective shipping labels, and only 99 receipts were returned, the Basic Exception Report would indicate the missing receipt, as well as the shipment number for the missing receipt. As a result, the shipping company can effectively follow-up with the driver or the customer to determine what happened to the missing receipt or whether the delivery actually occurred.

Advanced Exception Reports compares more than two document types. Advanced reports can process documents from a primary document type and multiple secondary document types (a one-to-many relationship), and will find any missing documents. Advanced Exception Reports also allows users to place ticklers on documents to bring attention to such tasks as renewals, re-certifications, etc. The user also can specify the number of wait days after the base document is entered into the system to search for the related document, the expiration period of documents and total number of related documents of the specific type that must be in the system.

### Who Will Benefit

Organizations that manage collections of documents related to one process, application or issue will greatly benefit from the module's ability to tie like documents together and to automatically track lost content. Customer, vendor and partner participation within a business process will often generate several documents pertaining to a single subject or issue where accountability is key.

### Technical Features

- Comparing the sum of keyword values on related documents to a single value on the primary document.
- Track multiple, related documents
- Ticklers on documents to bring attention to issues requiring attention

### Business Benefits

- Manage collections of documents related to single, central process
- Reduce time taken to locate documents, decreasing cycle times for business processes
- Audit status of related documents

### System Requirements

- OnBase Exception Reports license
- OnBase Client license
- OnBase Configuration Module (to configure Exception Reports)