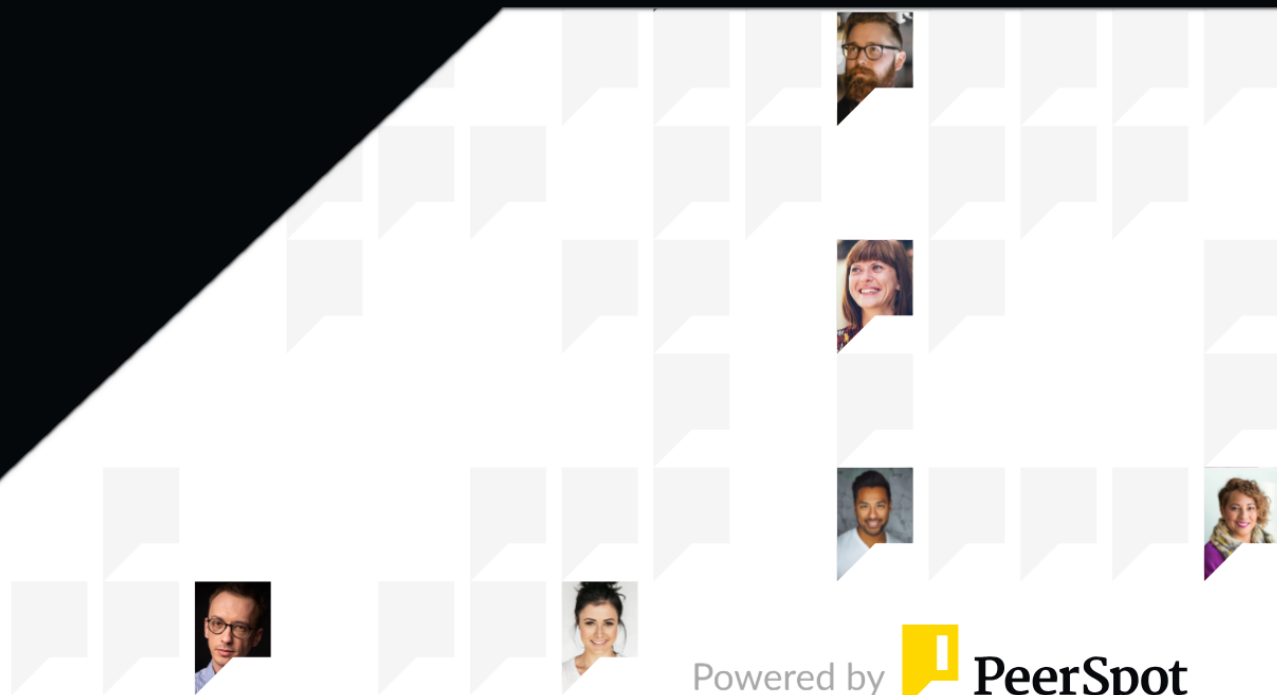




Hyland OnBase

Reviews, tips, and advice from real users



Powered by  **PeerSpot**

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Product Recap



Hyland OnBase

Hyland OnBase Recap

Hyland OnBase is acclaimed for its robust document management, automating workflows, and improving organizational efficiency across various industries. Praised for its ability to manage records compliantly, especially in regulated sectors like healthcare and finance, the tool also integrates smoothly with other enterprise systems. Users benefit significantly from streamlined processes, reduced manual tasks, and enhanced data accuracy, boosting productivity and customer satisfaction.

Valuable Features

Excerpts from real customer reviews on PeerSpot:

- ✓ “Hyland OnBase is valued for its security, especially for those in the finance domain who require data confidentiality.”



Verified user

Product owner at a computer software company with 10,001+ employees

- ✓ “It provided data security features, allowing restrictions on sensitive documents, such as who could view or modify them.”



Verified user

Program Manager at a financial services firm with 11-50 employees

- ✓ “Its most valuable aspect is its flexibility”



Verified user

Solution Architect at a financial services firm with 5,001-10,000 employees

- ✓ “The product's initial setup phase is not difficult.”



Srinivas Rao Kagitha

Senior Onbase Developer & Administrator at HTC Global Services (INDIA) Private



“We found the setup process to be okay since they do offer a troubleshooting guide.”



Verified user

Product owner at a computer software company with 10,001+ employees



“The solution is very developed and we are not taking full advantage of its functionalities.”



Mitchell Olinsky

Vice President of Enterprise Applications at GULF WINDS FEDERAL CREDIT UNION



“The retention module is one of the most valuable features. Whatever we scan onto the system can be identified and we are notified when the records are due to be disposed.”



Phemy Lekalakala

Manager of Information Systems at University of the Witwatersrand

What users had to say about valuable features:

“The solution's most valuable characteristics are its features, mostly those used by its client, like workflows, some advanced capture stuff, dashboards, and reports..”

Srinivas Rao Kagitha

Senior Onbase Developer & Administrator at HTC Global Services (INDIA)
Private

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“Its most valuable aspect is its flexibility. You can apply any keyword to search for anything within a document. This flexibility is also its biggest drawback: If you overuse the number of keywords, you can run into performance issues..”

Verified user

Solution Architect at a financial services firm with 5,001-10,000 employees

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“OnBase is a remarkable tool. It is a well-done product. Hyland has a lot of experience in building it and looking for new things for clients in terms of functionalities.

It has amazing stability, and it can grow horizontally and vertically. It is built for growth. Their technical support is also quite good and available throughout the year..”

Verified user

Technical Manager at a tech services company with 51-200 employees

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Hyland OnBase is valued for its security, especially for those in the finance domain who require data confidentiality. Furthermore, the solution offers a variety of integrations with other tools, such as Epic in the UK. This integration ensures seamless data access and management. Lastly, Hyland OnBase is available in a desktop version, a cloud version preferred by healthcare teams due to public data requirement, and a mobile version which is akin to healthcare applications like Practo in India. It is widely used in healthcare due to these facets.

Verified user

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Product owner at a computer software company with 10,001+ employees

“The dashboards and reporting are quite good.

The product does offer a low-code environment, which is great for non-technical teams.

We found the setup process to be okay since they do offer a troubleshooting guide.

It is scalable and stable. .”

Verified user

[Read full review](#) 

Product owner at a computer software company with 10,001+ employees

“Hyland OnBase offered robust system features ranging from configuring indexing fields to building auto-import routines for regular file imports.

It provided data security features, allowing restrictions on sensitive documents, such as who could view or modify them.

The user interface was intuitive, and the product integrated well with other applications like Outlook and Salesforce, enabling easy document indexing and access..”

Verified user

[Read full review](#) 

Program Manager at a financial services firm with 11-50 employees

Other Solutions Considered

“I used to be a FileNet and .NET developer. OnBase provides high-value solutions for organizations with much less cost in comparison to other ECM solutions..”

Verified user

[Read full review](#) 

Ecm Technical & Pre Sales Manager at a computer software company with 51-200 employees

“We did not have a previous solution. The first company I worked for moved from a paper-based system to imaging. My current company relied on shared drives before this system..”

Verified user

[Read full review](#) 

Director at a financial services firm with 51-200 employees

“We normally compete with Oracle and IBM. These are the main competitors. OpenText is also a competitor but not the main one.

The main difference from other solutions is that OnBase is one and only one platform. You don't have to integrate other things. You have one solution for everything. When you install and begin to use OnBase, you use other functionalities like switching the licenses. You don't have to reinstall or install new software to add functionality, which is an attractive thing for the customers..”

Verified user

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Technical Manager at a tech services company with 51-200 employees

“I have experience with OpenText Documentum. Architecture and technology-wise, OpenText Documentum and Hyland OnBase are completely different. OpenText Documentum is more of a Java-based tool. Hyland OnBase has a .NET framework. Our client used OpenText Documentum for the manufacturing domain. They use the tool to maintain content related to the user guides, installation guides, and the images of the appliances, all this stuff. I am not sure how good OpenText Documentum is for the insurance domain, but it is good for manufacturing. Hyland OnBase has an expensive licensing model. What I feel is OpenText Documentum is more expensive than maintaining Hyland OnBase..”

Srinivas Rao Kagitha

[Read full review](#) 

Senior Onbase Developer & Administrator at HTC Global Services (INDIA)
Private

ROI

Real user quotes about their ROI:

“The product is insurance domain-friendly in nature. The tool is being used in domains other than insurance. What I feel is that the tool is more of an insurance domain-friendly tool. I think it benefits the insurance industry a lot in terms of security, maintaining the content, and using the workflows..”

Srinivas Rao Kagitha

Senior Onbase Developer & Administrator at HTC Global Services (INDIA)
Private

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Use Case

I was a vendor managing Hyland OnBase for Hyland, not as a direct user but as a business partner. We managed the solution and were a partner with Hyland.

Verified user

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Product owner at a computer software company with 10,001+ employees

“We are a financial institution and we keep all of our member documents on Hyland OnBase. We keep statements, photo IDs, core system reports, etc. It also has a link to DocuSign where it automatically downloads DocuSign documents. .”

Mitchell Olinsky

[Read full review](#) 

Vice President of Enterprise Applications at GULF WINDS FEDERAL CREDIT UNION

“It is used for basic documents. It is like a document manager.

I am working with Foundation on EP3. We have clients with on-premises deployments, and we have clients with cloud deployments..”

Verified user

[Read full review](#) 

Technical Manager at a tech services company with 51-200 employees

“Hyland OnBase was used as our primary document and image repository, and we extensively utilized the workflow module within it. It was used to store all of our customer documents, system-generated reports, operational items we needed, and check images. We built out a workflow module, including one specific for accounts payable..”

Verified user

[Read full review](#) 

Program Manager at a financial services firm with 11-50 employees

“My customers use it mainly for financial work, where they don't want their data leaked. If we put it on the cloud, there is definitely some chance of leakage. While every cloud is secure, ultimately, it is in the hands of the cloud admin. Therefore, we rely on an on-premises solution, which is much safer in the case of financial applications.

Also, we have some customizations of OnBase, which are MRM, ROI, and those kinds of applications for the product which are used in the healthcare domain..”

Verified user

[Read full review](#) 

Product owner at a computer software company with 10,001+ employees

Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

I found the initial setup to be complex. A trial version with a simpler setup could be beneficial, similar to how games offer a level to try before fully installing.

Verified user

[Read full review](#) 

Product owner at a computer software company with 10,001+ employees

“The initial setup was complex, particularly building a custom accounts payable workflow module. This task was supported and guided by the vendor, Fiserv..”

Verified user

[Read full review](#) 

Program Manager at a financial services firm with 11-50 employees

“The solution’s initial setup is a little complex. The deployment took around six months. Three people, including an administrator, were involved in the solution's deployment. The solution is deployed on the Hyland cloud..”

Maria Galindo

[Read full review](#) 

I was a user at a computer software company with 201-500 employees

“The product's initial setup phase is not difficult. I have managed three upgrades, so I can do everything individually with the tool. The upgrades were for the services used by clients.

My company takes care of the product's deployment phase in a sequence, though not always. Initially, maybe the first step would be the database of Hyland OnBase, followed by the services according to end-user clients. Applications and web clients are involved in the deployment, So it has a sequence, and it will take maybe six months. We need to do testing, starting from lower enrollments and all those things..”

Srinivas Rao Kagitha

[Read full review](#) 

Senior Onbase Developer & Administrator at HTC Global Services (INDIA)
Private

“They provide a SOAP-based API, which has been difficult to integrate with our MuleSoft Service Bus. We're considering moving to their more modern REST API, which has better security hooks that we can leverage more effectively with MuleSoft.

A typical system deployment can happen overnight. We don't have an automated pipeline for the application; everything is done manually. If it's strictly an update to the configuration, and barring testing, it's an overnight process.

Everyone involved in development, configuration, business analysis, and management is part of one team. A separate team of about four people is responsible for administration tasks such as patching the servers and installing the updates developed by the development group..”

Verified user

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Solution Architect at a financial services firm with 5,001-10,000 employees

“Installation-wise, there are sometimes some challenges. However, we do have some troubleshooting guides that help us troubleshoot the issues we are getting. At times, it includes a few different components, so there is room for improvement to help the troubleshooting guide become clearer. We can easily handle a one-time installation in the case of on-premise since, once it is installed on one of my machines, I can keep using the same setup again and again. It's easy to understand once you have done it.

I'd rate the installation process a six out of ten in terms of ease of deployment. For the most part, it is just a step-by-step installation.

There is no specific maintenance needed as such. That said, when there is a version upgrade, then there are certainly some challenges due to the fact that the technology is legacy now and, of course, the turnaround time is longer. If we run into any challenges, then the turnaround time to resolve issues is also more since the technology is older. .”

Verified user[Read full review](#) 

Product owner at a computer software company with 10,001+ employees

Customer Service and Support

“Their technical support is quite good. We get support 24 hours and 365 days a year. It never stops. They are working even during the United States holidays. They have support even on those days..”

Verified user

[Read full review](#) 

Technical Manager at a tech services company with 51-200 employees

“Whenever we have something or need assistance from a tool that is beyond our reach, like there are certain limitations, querying databases, or maybe any critical issues, we definitely reach out the solution's technical support team. I think my company is satisfied with the support of the product. I rate the technical support an eight out of ten..”

Srinivas Rao Kagitha

[Read full review](#) 

Senior Onbase Developer & Administrator at HTC Global Services (INDIA)
Private

“We primarily worked with Fiserv for technical support and not directly with Hyland. The Fiserv team was helpful, although instances existed where their database was tricky to manage.

Our vendor relationship facilitated integration with our system and offered additional service beyond the Hyland OnBase product..”

Verified user

[Read full review](#) 

Program Manager at a financial services firm with 11-50 employees

“We wanted to implement a stored procedure against their database instead of using their internal or provided APIs. To get permission, you have to go through an entire legal process.

They bear some liability if a document gets lost, destroyed, or leaked, so they don't want to give customers unrestricted access to write anything against their database. Even after we demonstrated the performance issues, they kept suggesting alternatives. They agreed only after we proved that their APIs couldn't deliver the performance we needed. We had to go through a legal negotiation to amend the contract to allow the stored procedure..”

Verified user

[Read full review](#) 

Solution Architect at a financial services firm with 5,001-10,000 employees

Other Advice

Currently, I find OnBase's architecture adds to the cost, and the setup process is expensive and complex. Additionally, its advantages lie in its security and integration capabilities, although more integration points are needed to incorporate Hyland's acquired products without loss. I would rate the overall solution six out of ten.

Verified user

Product owner at a computer software company with 10,001+ employees

[Read full review](#) 

“The solution helps with compliance and data security. I would recommend the solution to other users because of its stability, flexibility, and security.

Overall, I rate the solution an eight out of ten..”

Maria Galindo

I was a user at a computer software company with 201-500 employees

[Read full review](#) 

“Hyland OnBase appeared more robust compared to [Alfresco](#), but this perception might be influenced by deployment and configuration differences. Users appreciated the user interface and extensive integration capabilities.

I'd rate the solution eight out of ten..”

Verified user

Program Manager at a financial services firm with 11-50 employees

[Read full review](#) 

“I would rate Hyland OnBase an eight out of ten. It can do everything that is required. The tool is a powerful system that can serve any organization. The tradeoff is cost and complexity.

You need to train multiple people because it is a complicated system. We had one person who was trained to use the system and once he left us, we were in a fix. So I would suggest having at least two to three people that are fully trained to use and administer the system..”

Mitchell Olinsky

Vice President of Enterprise Applications at GULF WINDS FEDERAL CREDIT UNION

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“The product does what you need to do if you have a regulatory need to retain a document for X number of months or X number of years. It allows you to set that expiration date, and once it hits that retention period, assuming you put one, it will handle the removal. For example, financial institutions must keep checks and images on hand for two years. After two years, checks older than that are automatically removed from the database and the repository.

They have AI offerings, but we have not yet investigated them.

Overall, I rate the solution a nine out of ten..”

Verified user[Read full review](#) 

Solution Architect at a financial services firm with 5,001-10,000 employees

“It is being integrated with Guidewire. Some other person did the Guidewire and Hyland OnBase integration, so it was in place, but we maintain stuff and support the integration.

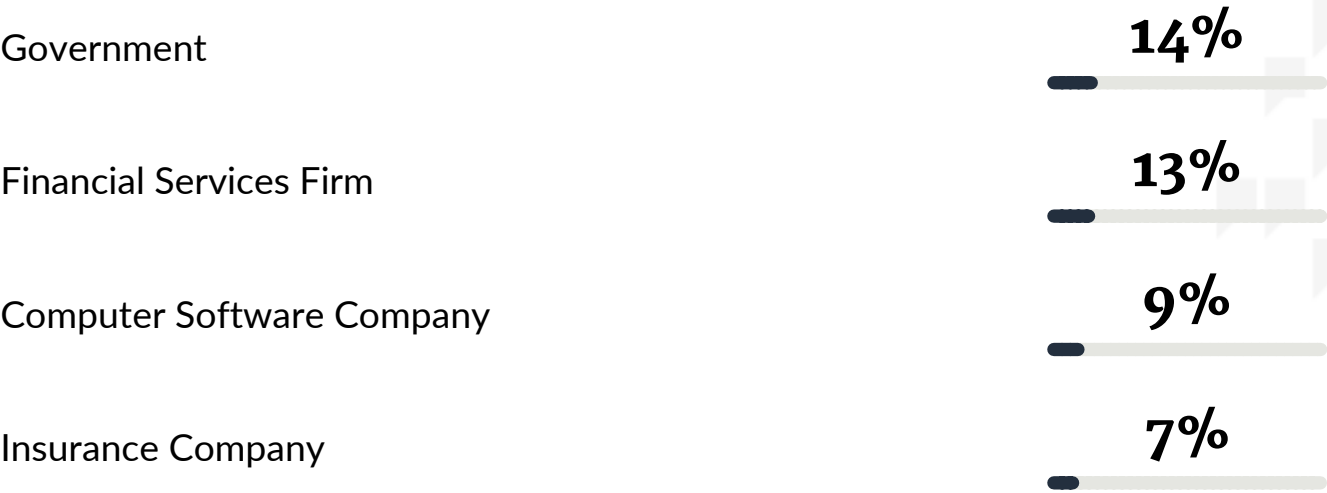
I haven't explored any AI features in the tool. I think the tool has recently implemented a lot of changes with the cloud and is introducing new features as well, but I need to explore them.

I can recommend the tool to others. Once the setup of the tool is done for an organization, one has to look into more of the configuration part. They don't have to go for much complex customizations. If they are ready to spend time on the cloud-based maintenance of the servers, everything will be managed by Hyland, and the users won't have to take care of many such areas. If the users want to be secured and be within their network, they can go with the existing Windows-based servers, where they need to maintain the servers and databases.

With the features and advanced capture functionality, along with the content management stuff, I rate the tool a seven out of ten..”

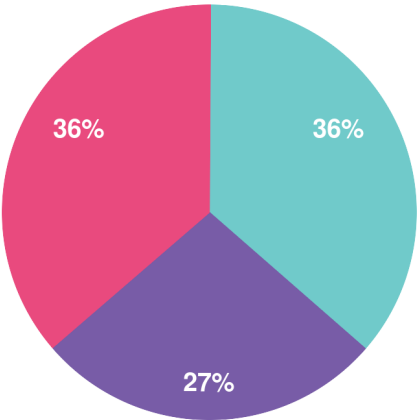
Top Industries

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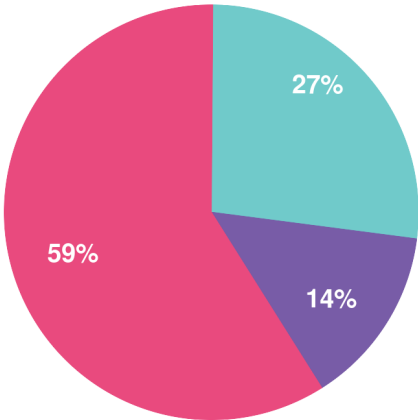


Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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