



**Hyland OnBase**

# **Reviews, tips, and advice from real users**



Powered by  **PeerSpot**

# Contents

Product Recap..... 3 - 4

Valuable Features..... 5 - 11

Other Solutions Considered..... 12 - 13

ROI..... 14 - 15

Use Case..... 16 - 19

Setup..... 20 - 23

Customer Service and Support..... 24 - 25

Other Advice..... 26 - 29

Trends..... 30 - 31

About PeerSpot..... 32 - 33

# 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:

- ✓ “The impact of Hyland OnBase on our organization is that automating manual processes has had an incredible effect on our return on investment, and the man-hours saved by automating processes pays for the system, ranging from one to five hours.”



**Abdul\_Jabbar**

Senior Software Engineer at Infosys

- ✓ “Hyland OnBase is a powerful enterprise management platform that is scalable, flexible, and secure in storing, retrieving, and making workflow automations.”



**Verified user**

Business Analyst at a tech vendor with 10,001+ employees

- ✓ “With Hyland OnBase, every document is unique, and access can be restricted and audited depending on user permission, allowing a company to take control of their information and be more productive.”



**Cynthia Mute**

Software Engineer at Honeywell



“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



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



**Srinivas Rao Kagitha**

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



“Its most valuable aspect is its flexibility”



**Verified user**

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

## What users had to say about valuable features:

“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

[Read full review](#) 

---

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

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

[Read full review](#) 

“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

---

“The best features Hyland OnBase offers include a powerful admin interface. The Unity application is a work in progress, and Hyland OnBase also has document storage, basic workflow activities, and Hyland OnBase security is top-notch.

“Great support channels for resolving application issues is something I would add about the features, along with support for a wide variety of files that can be stored within the product. It is also easy to query the database to pull reports on usage.

“Hyland OnBase has positively impacted my organization because we use the system internally to our departments, but it also helps the system by filling out web forms that help us gather information from our employees quickly and more effectively than through email or paper methods. It is also very beneficial because we are able to reduce our paper costs by collecting documents electronically and keeping them electronically through the life cycle of that document. We have increased visibility into where our bottlenecks are for processing documents. It has become easier to identify inefficient processes and pinpoint how to leverage the product to reduce the time and effort needed to process that document.

“We can easily retrieve documents that need to be stored long-term, enabling us to reduce our paper by collecting documents electronically and keeping them electronically throughout the life cycle of that document. This has reduced the cost by fifty percent. We have increased visibility into where our bottlenecks are coming from, especially which processes are processing documents..”

**Cynthia Mute**

Software Engineer at Honeywell

[Read full review](#) 

“Hyland OnBase offers features that are very much scalable. As the documentations, the size of the files, or number of files increase, it automatically scales itself. It is intuitive to use. It is easy for a newcomer to just get the KT and learn. There are technical support documentations, though there are fewer available from Hyland's side. Scalability is a major plus point. Customer support and technical service is also a good point for Hyland's side. It does not have any downtime. I have not faced it till now. All the services were up, fast, and reliable, and it is very secure. These are the features that stand out regarding Hyland OnBase.

During my project, as I already mentioned, Hyland OnBase can accommodate increasing document volumes and integrate additional users. During my project, the organization continued adding new documentation categories and increasing invoices that we saw. These were entirely integrated into Hyland OnBase without any further upgrade or storage upgrade, or affecting any system's performance. The architecture which Hyland OnBase works with has the capability of gradually increasing itself, rather than working on a fixed storage. That is how it was helpful to us.

I believe Hyland OnBase has impacted my organization positively by faster document retrieval that I mentioned earlier, intuitive setup, reduced manual processing, and comes with security. These insurance policies, underwriting, and invoices are very sensitive to the users as they contain PII information. From security aspects, it is very secure. It has increased the transparency of the processes and workflows. Every user who is involved in each of the steps is well aware. Even the manager gets an update. This is a very big plus point in seeing the transparency in this process. It has reduced the manual work and paperwork dependencies and also helped us to upskill more, make more business with less effort and person headcount. These are the helpful things..”

**Verified user**

Business Analyst at a tech vendor with 10,001+ employees

[Read full review](#) 

The best features Hyland OnBase offers in my experience include being a robust storage solution that integrates well with the Epic solution, allows Unity Forms to be easy to create and use, and has Distribution Services for sending email notifications as reminders.

Out of those features, the workflow engine has made the biggest difference for me because it is excellent for automating approval processes, and we use Hyland OnBase for legal requests, hardware requests, travel requests, corporate credit card requests, and file transfer requests.

“WorkView is an incredible module for gathering and displaying summary information, and we utilize it highly in our subsidiary to manage our legal contracts, their financial billing process, and their travel. We also use the Document Import Process coupled with Unity API for writing custom code to automate processes to send and receive data from other systems that are not yet API enabled.

“The impact of Hyland OnBase on our organization is that automating manual processes has had an incredible effect on our return on investment, and the man-hours saved by automating processes pays for the system, ranging from one to five hours.

“I measured the man-hours saved through the tracking of workflows and automation processes.

“Additionally, Hyland OnBase has allowed us to move away from moving paper around various departments, providing workflow management to keep approval inside the system and out of the email boxes, eliminating the need for paper storage, and saving storage costs with other vendors. .”

**Abdul\_Jabbar**

Senior Software Engineer at Infosys

[Read full review](#) 

# 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**

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

[Read full review](#) 

---

“Before using Hyland OnBase, the invoices used to come and we manually took out the key information details, which would take around a week's time, mainly four to five days. Now, with the onset of Hyland OnBase, this insurance workflow is done within one day. This much effort it has saved..”

**Verified user**

Business Analyst at a tech vendor with 10,001+ employees

[Read full review](#) 

“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**

[Read full review](#) 

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:

I have seen a return on investment with Hyland OnBase because it provides a very reliable ECM platform for my organization, helps to remove the dependency on paper files and file folders, saves real estate costs, and facilitates the ability to work from anywhere. It has made same-day processing of all incoming and outgoing documents a reality.

**Abdul\_Jabbar**

Senior Software Engineer at Infosys

[Read full review](#) 

---

“I have seen a great return on investment with Hyland OnBase. We have been able to reduce staff by not needing temps and have achieved a great reduction of space due to not using file cabinets. It is nice to have instant images without getting up and looking for things..”

**Cynthia Mute**

Software Engineer at Honeywell

[Read full review](#) 

“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

[Read full review](#) 

# 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**

[Read full review](#) 

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

---

“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

---

Hyland OnBase is used across the entirety of the organization in a variety of different ways, and its primary use is as a document storage solution that is used in conjunction with other systems such as our primary EMR, Epic. Along with storage and integration, workflow processing is a major tool used by the organization for all of its departments.

For an example of how my team or department uses Hyland OnBase in our daily work, accounts payable uses it for processing and finalizing payments, and Hyland OnBase is also used for its mass import capabilities such as DIP, COLD, Mailbox Importer, and EDI, especially by outbilling areas to quickly bring in needed documents for the workflows.

“Another major use of Hyland OnBase by our organization is that it has found more and more use in new departments to ease workflow, cut down on time, and reduce paper use. .”

**Abdul\_Jabbar**

[Read full review](#) 

Senior Software Engineer at Infosys

---

“As a business analyst, while working on a recent project, I used Hyland OnBase as an enterprise-like document management tool. It was used for storing, organizing, and retrieving invoices regarding our insurance project. I worked with the document management system specifically for managing invoices.

We used to receive pricing invoices from our customers, including customers in South Africa. We received those invoices and created a workflow automation. We navigated those invoices and fetched the required information by using OCR, which is already an integrated feature of Hyland OnBase. We extracted key information such as premiums, insurance policy names, premium coverage for the year, age, and particular PII information of the user. We sent them to our insurer. The person who was sitting in the back end performed verifications and then gave the underwriting result, and we provided the policy accepted or declined result. This entire workflow was automated by using Hyland OnBase.

Further, we managed documents including our training documents, business documentations, and business requirement documentations. We stored these in Hyland OnBase for our training and recording purpose for our next generation of colleagues to train them, whoever joined our new project..”

**Verified user**[Read full review](#) 

Business Analyst at a tech vendor with 10,001+ employees

---

“My main use case for Hyland OnBase is implementing it as both a simple and complex document management system across many different market segments for the sole purpose of making scanned and virtual documents easily searchable and accessible. The workflow capabilities of the product, as well as the Unity web interface and the ability to seamlessly tie into most third-party applications to allow easy associated information lookups within Hyland OnBase, led to a very dynamic and game-changing product compared to how my organization was previously managing their information.

“A specific example of how I have used Hyland OnBase for document management or workflow in my organization is the amazing integration with third-party applications. Being able to get documents and information through email, folder importing, mainframe screens, other applications, and XML/CSV streams was simple, powerful, and effective.

“Regarding my main use case, it is very simple, effective, and it just works when it comes to content management systems. We rely on static folder structures for storing information or Excel access tables, which can easily become a mess. With Hyland OnBase, every document is unique, and access can be restricted and audited depending on user permission. It allows for a company to take control of their information and be more productive..”

**Cynthia Mute**

Software Engineer at Honeywell

[Read full review](#) 

# 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

---

“VDI and cloud was very easy. I was responsible for gathering documentations, making the BRDs and the UAT scenarios. The setup was easy and the document management system was very easy and handy. We can automatically get the required documentations without hovering or just searching around. It always has a clean interface where we can find whatever we need in a few seconds..”

**Verified user**

[Read full review](#) 

Business Analyst at a tech vendor with 10,001+ 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**

[Read full review](#) 

Solution Architect at a financial services firm with 5,001-10,000 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](#) 

“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](#) 

“My advice for others looking into using Hyland OnBase is that it is more efficient, fast, and easy, making it a great business process management and workflow tool to manage the API. My organizational business areas are able to automate what was once manual tasks by leveraging the ability to define workflows that are congruent to internal business processes. Hence I am able to save a lot of time and cost. I would rate Hyland OnBase a nine out of ten..”

**Cynthia Mute**

Software Engineer at Honeywell

[Read full review](#) 

---

“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**

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

[Read full review](#) 

---

My advice to others looking into using Hyland OnBase is that it is a highly recommendable tool because it has the ability to ingest documents through multiple methods such as scanning, email, DIP, and web services. It also helps organize and store documents in secure storage with encryption and user role-

based access controls, along with the ability to securely deliver documents to internal and external customers.

Hyland OnBase is a great product with a lot of features and flexibility for customization to implement various business needs, making external integration with various business systems easy. Overall, it is a robust solution that can support the demanding usage needs for multiple departments and is very stable, secure, and has been a reliable and easy, scalable solution for our organization.

“I found this interview to be well done but suggest trying to be a little faster. I gave this review a rating of 9 out of 10. .”

**Abdul\_Jabbar**

Senior Software Engineer at Infosys

[Read full review](#) 

“The two points I take off are for those improvement things which Hyland needs to work on that I talked about. If we generally speak about Hyland OnBase, it is a powerful enterprise management platform that is scalable, flexible, and secure in storing, retrieving, and making workflow automations. I am satisfied, but I would say it can look after the pricing, integrate more AI features, and improve training materials and documentations from their side.

I have not used AI as much because when I left the project, we were not using AI in Hyland OnBase. However, I have heard that they have integrated AI in recent releases. I am not sure about the accuracies of the AI integrated in Hyland OnBase.

My recommendation would be to have a focused business plan or use case. You can do a competitor analysis with Hyland OnBase and other products in the market. Hyland is a standout in every aspect because if you go ahead for your business use case, defining clear document classifications, then the metadata standards, then your workflow requirements before implementation, it would be better. Investing in document management for training materials is important because the platform has a learning curve, and people adoption significantly influences project success. Investing in user training is equally important, and also focusing from my role as a business analyst, involving business stakeholders early during project kickoff for requirement gathering and validation workflows through demos helps in ensuring we build a final solution that aligns with their business and operational needs. These are the things which users can consider before using Hyland OnBase. I gave this review a rating of 8..”

**Verified user**

Business Analyst at a tech vendor with 10,001+ employees

[Read full review](#) 

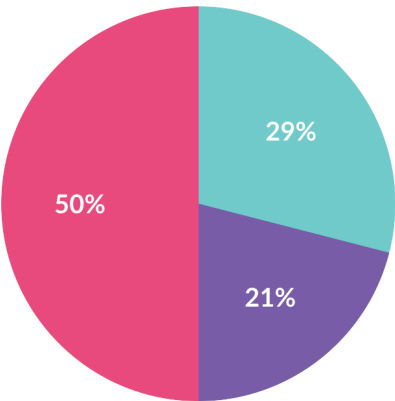
# Top Industries

by visitors reading reviews

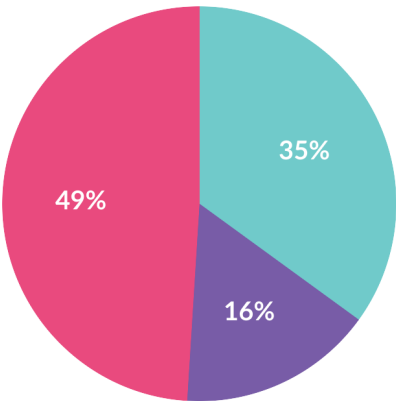


# Company Size

by reviewers



by visitors reading reviews



Large Enterprise

Midsized Enterprise

Small Business

# About this buyer's guide

Thanks for downloading this PeerSpot report.

The summaries, overviews and recaps in this report are all based on real user feedback and reviews collected by PeerSpot's team. Every reviewer on PeerSpot has been authenticated with our triple authentication process. This is done to ensure that every review provided is an unbiased review from a real user.

## Get a custom version of this report... Personalized for you!

Please note that this is a generic report based on reviews and opinions from the collective PeerSpot community. We offer a [customized report](#) of solutions recommended for you based on:

- Your industry
- Company size
- Which solutions you're already considering

The customized report will include recommendations for you based on what other people like you are using and researching.

Answer a few questions in our short wizard to get your customized report.

[Get your personalized report here](#)

# About PeerSpot

PeerSpot is the leading review site for cloud, AI, and business software. We created PeerSpot to provide a trusted platform to share information about software, applications, and services. Since 2012, over 22 million people have used PeerSpot to choose the right software for their business.

PeerSpot helps tech professionals by providing:

- A list of products recommended by real users
- In-depth reviews, including pros and cons
- Specific information to help you choose the best vendor for your needs

Use PeerSpot to:

- Read and post reviews of products
- Access over 30,000 buyer's guides and comparison reports
- Request or share information about functionality, quality, and pricing

Join PeerSpot to connect with peers to help you:

- Get immediate answers to questions
- Validate vendor claims
- Exchange tips for getting the best deals with vendor

Visit PeerSpot: [www.peerspot.com](http://www.peerspot.com)

## PeerSpot

244 5th Avenue, Suite R-230 • New York, NY 10001

[reports@peerspot.com](mailto:reports@peerspot.com)

+1 646.328.1944