Credit Union Boosts Security & Unlocks Time to Enhance OnBase Solution with the Hyland Cloud

For over 54 years, the client, a Credit Union in Western NY, has provided friendly, member-focused financial services to its 21,000+ members and organizations. The Credit Union's team and its volunteer Board of Directors strive to efficiently exceed member expectations while remaining a sound, stable financial institution.

OBJECTIVES

- Streamline the Upgrade Process
- Reduce Administrative Work for Staff
- Gain More Time to Spend Leveraging OnBase
- Stronger Data Security
- Improved Solution Performance

Why They Migrated to the Hyland Cloud

After over 24 years of using OnBase exclusively for document storage, the Credit Union's team knew they wanted more for their solution. But the Credit Union's Application Developer and Database Administrator (OnBase Admin) had to spend a significant amount of time on administrative tasks to keep the system running smoothly. As a result, he had little time to explore and implement new uses for OnBase that would benefit the organization. The Credit Union also faced difficulties getting file encryption to work within OnBase locally, which posed security risks.

When the Credit Union learned that moving to a cloud model could both offset its administrative workload and solve its encryptions challenges, the team knew that now was the time. As a long-time OnBase user, the Credit Union was very happy with their experience thus far and had no hesitation about choosing the Hyland Cloud as their platform. They also saw Hyland as a leader in its industry and trusted its expertise.

> "We adopted this mantra of, 'Let the experts manage the system so that we can focus on leveraging the system for our members.'"
>
> Manager of Information Systems, the Client

The Credit Union was also impressed by many of the Hyland Cloud's offerings, like streamlined upgrades and data redundancy. They were also in the middle of transitioning to a new Hyland licensing model, which meant they would gain new modules. But to take advantage of them, they would need to locally spin up new website services themselves if they continued hosting their OnBase solution locally. The Credit Union then learned if they moved to the Hyland Cloud, Hyland would take care of this extra step for them, allowing them to start using the modules faster.

The Migration Journey

At the time of their migration, the Credit Union's OnBase solution was small, acting solely as a document repository. They weren't using many of the modules available for OnBase and had no workflows. As a result, their list of use cases to test for was short, and they enjoyed a relatively smooth, straightforward migration. The main obstacle they faced was figuring out how to package up all its disc groups and ensuring they were the correct file size to move over to the backfile SFTP. But once this challenge was solved and everything was migrated to the cloud, the team was surprised by how seamless the entire migration process went.

Of the migration, the Credit Union's Manager of Information Systems remarked, "It was so surprising how quiet it was. There were a few things that had to be caught up over the next few weeks, such as 'this isn't working right,' or 'someone can't get access to this," and we had to restructure some of our access, but it was pretty impressive."

The Credit Union's OnBase Admin was especially impressed with the support they received from both Naviant and Hyland.

> "The migration team was fantastic. They were really helpful and very, very responsive. I really enjoyed the fact that the week we went live, they [Naviant and Hyland] had a full week 24/7 support team chatline open, so as we were working on getting things up and running, if there were any questions, we could just drop into Teams and there were people assigned to it who were listening and watching for any questions that would come up. So, we could ask a question, get an answer, and continue with our day."
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> Application Developer and Database Administrator, the Client

Life in the Hyland Cloud

Post implementation, the Hyland Cloud has brought the team a variety of changes to adjust to, along with benefits. For example, accessing the admin functionality has changed. When the Credit Union needs to access the thick client to enter the configuration client, they must first go through Citrix, which was a bit glitchy early on but has since stabilized. Another change relates to IP address authorization, as their firewall requires them to have an IP allow list for Citrix. Since that list is large and changes periodically, they need to regularly go in and add new IPs.

Overall, the Hyland Cloud has provided a rather seamless user experience for the Credit Union. The Credit Union's OnBase Admin was initially concerned that migrating could cause slowdowns or they'd have internet-based timeouts involving the Unity Client. But the only slowdown has come from their single sign-on component, which takes users a little longer to log into. Fortunately, he hasn't received any other reports of timeout or slowdown-related issues from his users, and he hasn't experienced anything of the sort himself either, despite having the Unity Client open virtually all day, every day. The Credit Union's Manager of Information Systems commented, "Our general manager who uses OnBase said he can't believe how the performance is. It's actually faster than before." Enhanced performance is a benefit that the team hadn't expected but has thoroughly appreciated. "It's nice to know that the Hyland group has our environment fully optimized," the Credit Union's Manager of Information Systems said.

Storing their data in the cloud has given the team significant peace of mind, as they know that Hyland has strong measures in place for security. Moving to the cloud also added the data encryption they needed, which satisfied one of their objectives. Migrating to the Hyland Cloud also brought the Credit Union the easier upgrades they were hoping for and a strong test environment. The team has used its test environment extensively to stage new ideas, test how they work, and then migrate them over. They have also had a positive experience using the Hyland Cloud's migration tool.

Now that Hyland has taken over many of the OnBase day-to-day administrative tasks, the OnBase Admin has been able to shift his focus to helping the Credit Union use its system in new ways that serve the organization and its members. Some of these opportunities are modules that they had access to prior to migrating but lacked the time to pursue, and others are brand-new modules they have unlocked since migrating. He also said, "All in all, it was a nice improvement for us, and we accomplished everything we wanted to, even with some of the unknown setbacks along the way. Certainly, we're better off for it."

The Road Ahead

Looking to the future, the Credit Union has many solution enhancements they plan to implement and options they'd like to make available to users. And now that the Credit Union's OnBase Admin has more time to devote to these pursuits, they're finally possible. Some initiatives include storing more documents in OnBase and implementing document retention. They also recently discovered that they were paying to store documents in another system that could be stored in OnBase instead. Moving these documents into OnBase will both save them money and further centralize their content.

Additionally, there is going to be a big push when it comes to workflow. The Credit Union has found several instances of paper-heavy processes that will be excellent workflow use cases. They're also looking to use OnBase in their accounts payable department. Currently, they are processing their invoices via a combination of home-grown electronic and paper processes. The Credit Union is looking forward to moving this process into OnBase so they can easily pull up invoices whenever needed.