Migration Guide:

Moving from Hyland OnBase to Softdocs Etrieve

Welcome

The Etrieve platform from Softdocs is built to modernize operations across human resources, enrollment, student services, finance, and beyond. But choosing the right document management and process automation solution isn't just about technology. It's about partnering with a team that knows the public sector inside and out.
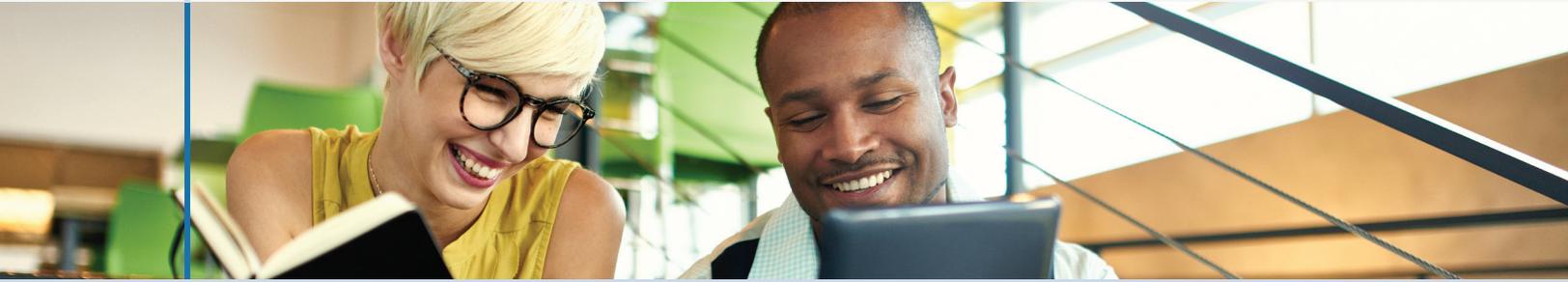
Universities, colleges, school districts, and government agencies are choosing Softdocs for lower costs, effortless upgrades, world-class support, and a secure, compliant cloud built for the public sector.

Meanwhile, Hyland customers are growing frustrated — paying more for support that feels unresponsive, managing buggy annual releases, and watching the product move into maintenance mode with no innovation. Now positioned for healthcare and banking, Hyland has shifted OnBase away from education and government, leaving institutions searching for a modern, mission-aligned vendor. They're finding that with Softdocs.

More than 100 organizations have migrated from Hyland applications to Etrieve. This guide is for teams using OnBase. It articulates the value and practicality of switching. You'll find a side-by-side look at features, what makes Softdocs and Etrieve different, insights from organizations who have moved, and a practical roadmap for migration.

Here's what's included in this migration guide:

The Outcomes of a Successful Migration

Migrating from OnBase to Etrieve from Softdocs isn't just a technical project — it's your opportunity to re-imagine how processes work. Softdocs has advised thousands of public sector entities, helping modernize organizations, empower staff, and deliver best-in-class experiences for users. Here are the outcomes we help all customers achieve.

> "The partnership with Softdocs has been exceptional. Whenever we encounter a challenge, their team is quick to respond and provide solutions, making them a critical part of our technology stack and strategic initiatives."

Chuck Flagg, Executive Director of Technology Infrastructure
Oakland Community College

Alignment with Organizational and IT Strategy

✔ Supports student and constituent success, compliance, team efficiency, and cost savings

✔ Establishes a long-term digital foundation, not just patching today's pain

✔ Solves bottlenecks in high-impact areas by leveraging forms, workflow, and e-signatures to automate approvals and route work dynamically

✔ Enjoys enthusiastic adoption by staff for its speed and ease of use

Protection of Sensitive Data

✔ Implements enterprise-grade application security, audit trails, permissions, and encryption

✔ Enforces retention policies for compliant disposition of documents

✔ Protects against disasters, theft, and loss with multiple layers of data redundancy

Information When, Where, and How It's Required

✔ Employs digital workflow to proactively push information to reviewers and approvers

✔ Captures diverse user information via fully customizable e-forms

✔ Bi-directionally integrates with core systems of record like SIS, ERP, and CRM to ensure consistent, reliable, and current information

Familiar Features, Modernized and Enhanced

1.   Enterprise Document Management

With OnBase, you may already be accustomed to scanning and storing documents in a centralized repository, applying indexes, and running searches when you need to retrieve records.

The Etrieve platform builds on this foundation by offering a modern, cloud-native repository with intuitive metadata tagging, faster search, automated retention policies, and stronger compliance controls. Documents are faster to find, easier to manage, and protected with confidence.
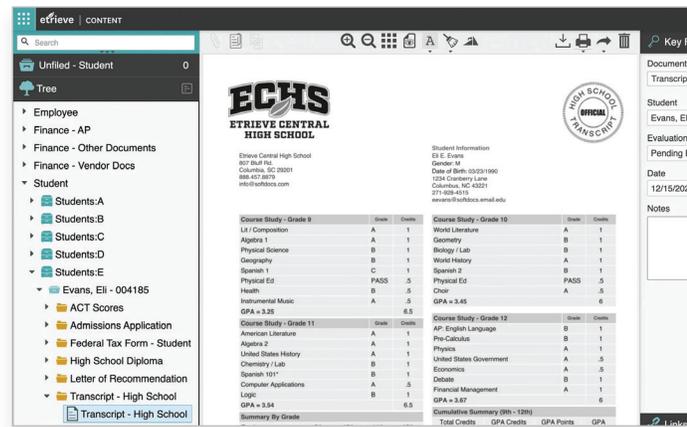

2.   Electronic Forms

While Unity Forms enables OnBase customers to produce forms with workflow logic, the product is crippled with dated limitations: it requires a desktop Windows client to create forms that are not accessible, mobile-ready, or attractive for end users.

Our solution takes e-forms into the modern age with a pure browser-based drag-and-drop authoring environment. It features WCAG 2.2 compliance out of the box, promotes mobile responsiveness by default, adds logic-based validation, offers seamless ERP/SIS integration and reusable saved sections, and is easily extended with an online forms library. Flexibility, accessibility, and efficiency from day one. (Also, they look great.)
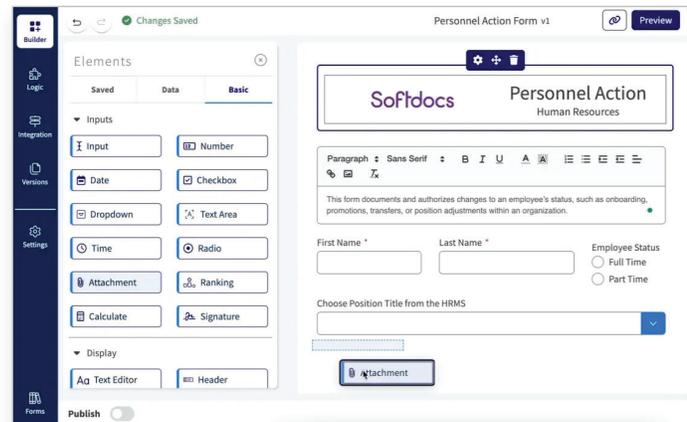
3. Workflow Automation

Many OnBase customers struggle with rigid and complicated workflows that require heavy IT intervention. Etrieve Flow modernizes this experience with a no-code, user-friendly workflow builder, conditional routing, and data integrated from your SIS/ERP in a workflow, giving your departments more control and minimizing IT intervention.
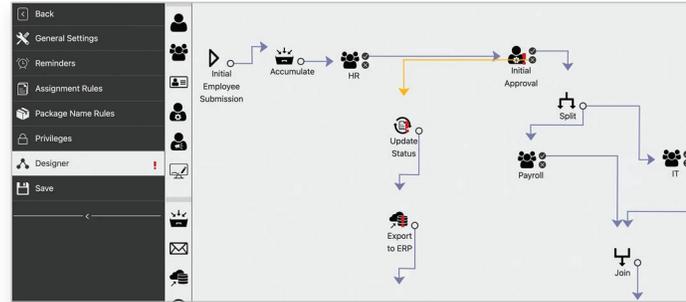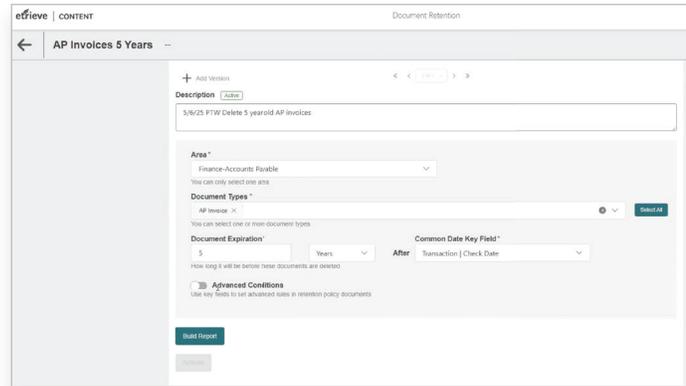
4. System Integration

OnBase connects workflows through Unity and WorkView configurations, which can require complex scripting or custom setup to move data between systems. The Etrieve platform advances beyond this method with modern APIs that provide secure, bi-directional integrations with ERP, SIS, and CRM systems — eliminating integration fragility while ensuring predictable, structured, and documented data exchange.
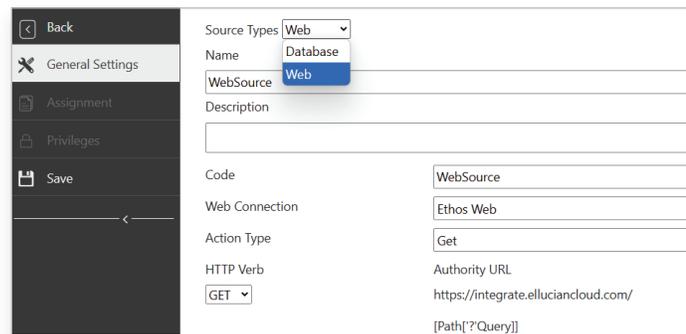
5. Compliance and Security

OnBase provides core audit logging and version control, but Etrieve is built to exceed compliance expectations. With role-based access, conditional controls, immutable audit trails, and configurable retention policies, every document, action, and change is tracked and protected.

Backed by certifications including SOC 2 Type II, NIST SP 800-53, CJIS, and TX-RAMP Level 2, the Etrieve platform delivers industry-leading peace of mind. With AES-256 encryption at rest, TLS in transit, full disaster recovery, responsible and transparent AI, granular permissions, and retention scheduling, Etrieve is engineered to meet the demands of higher education, government, and other regulated environments while keeping you in complete control.

"We were surprised at how easy implementation and training was and how well it worked out of the box. Softdocs seamlessly integrates with our ERP and other systems, saving staff time by eliminating data re-entry while providing students with a modern digital experience. The Softdocs service team was top-notch — very supportive and walked us right through the process."

MK Smith, Director of Application Services
Seattle University

6. Accessibility and Mobility

OnBase users may be comfortable retrieving documents through a desktop or web client, but true mobility remains limited. Access from a phone requires the separate downloaded OnBase Mobile App, and even then, feature parity doesn't exist across the desktop and web clients, so users often need to switch between multiple interfaces to complete tasks.

Etrieve eliminates that friction with a single, cloud-native experience that's accessible anytime, on any device.

Whether on desktop, tablet, or mobile, users enjoy the same functionality, intuitive design, and WCAG 2.2 AA-compliant accessibility, making it easier for everyone to work or submit forms from anywhere.
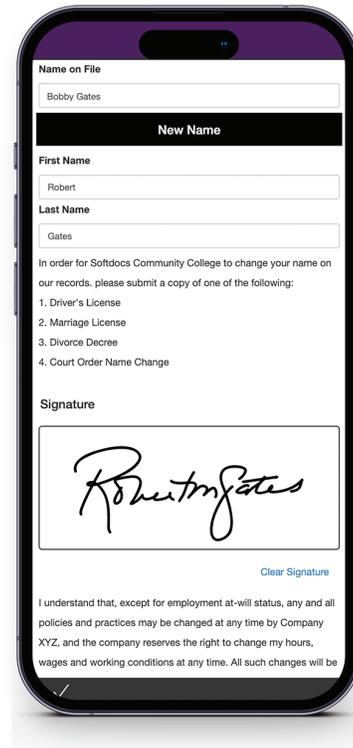
Eight Next-Gen Capabilities

While OnBase was once positioned across industries, Hyland's focus on healthcare and financial services leaves public sector organizations under-served, with minimal innovation. The Etrieve platform provides next-generation tools for your organization that merge the leading document management with a cloud-native architecture and future-ready AI.

1. Automated Deployment Upgrades

OnBase releases upgrades only once a year and the upgrades are still manual, time-consuming, and expensive. With Softdocs, upgrades are no longer a budget line item or an IT headache. With the Softdocs automated deployment approach, updates roll out seamlessly — often over the weekend — with no disruption or downtime. New features are enabled by flexible feature flagging for staff control. No more paid upgrades, scheduling outages, and lost time.

2. Intelligent Transcript Processing

Most OnBase customers require another application to handle transcripts that rely on outdated template-based OCR technology like Brainware. Without continual maintenance, these tools fall out of sync with shifting business needs and become shelfware. With Softdocs, transcript processing is *native*. Softdocs Intelligent Transcript Processing (ITP) uses generative AI to "read" transcripts like a human, converting class names, credit hours, and grades to clean, structured data. Simple, intuitive, and integration friendly.

3. Future-Proof Integration

With Etrieve, organizations can deploy stable, API-based integrations. Connect to SIS, CRM, and ERP platforms with modern API stacks and formal partnerships to ensure ongoing compatibility. With robust bi-directional integration, your organization can move documents and data directly into core systems without the brittle, one-off custom Unity/WorkView connections OnBase often requires.

"After 10+ years with a legacy document management system, we chose Softdocs. Their system offers unlimited e-forms and e-signatures, which is a significant advantage over using multiple solutions and paying for each envelope or document. We migrated over 8 million documents from our legacy system, redesigned workflows, and consolidated 10+ separate forms into a single super form.

Khalid Tariq, Associate Vice Chancellor, Information Systems
UMass Global

4.   Native, Unlimited E-Signatures

Many OnBase customers use Docusign, Adobe Sign, or similar tools. Within the Etrieve platform, legally compliant e-signatures are a native capability and they are unlimited. Customers frequently consolidate their disparate applications for document management, workflow, forms, and e-signatures into one Etrieve instance.

5.   Intelligent Document Processing

One of the platform's best-kept secrets is how Intelligent Document Processing (IDP) works behind the scenes to automatically read and categorize documents as they're captured. Documents that are batch uploaded, virtually printed, emailed, or scanned can employ IDP to extract and classify data instantly. This generative AI system is a generational leap over legacy OCR tools. Less manual entry, fewer mistakes, and faster processes.

6.   Data Hygiene

One of the biggest improvements users see when moving from OnBase to Etrieve is better data hygiene. Our configurable, clearly labeled fields eliminate the messiness commonly found in OnBase installations. During the ETL migration process, our transformation step cleans up existing issues and applies retention policies retroactively.

7.   Drag-and-Drop Forms and Flow

OnBase forms can capture data and send it through a workflow but requires IT intervention for anything beyond the basics. By contrast, Etrieve Forms provides a drag-and-drop builder to accomplish simple requests as well as complex, multi-step applications packed with dynamic fields, integrated datasets, and smart logic. It's also fully WCAG 2.2 AA compliant for both form creators and users, ensuring maximum usability for everyone. Workflows are also designed in a drag-and-drop interface. They run fully automated, with approvals and routing adapting in real time to responses or roles.

8.   Dashboards for Full Visibility

While OnBase relies on Unity queues and WorkView to organize work, they often lack the visibility and flexibility to deliver information without extra digging or custom configuration. Dashboards in Etrieve provide a clear, user-friendly view of your data that continuously updates, like a command center for forms and documents.

Best-in-Class Services and Customer Support

At Softdocs, the difference isn't just the tech, it's the people. From the first conversation, we take a consultative approach:

1. You're paired with senior professional services leaders
2. Together, we map out a fixed-fee migration plan with clear timelines
3. You get a dedicated team that stays with you through migration and beyond
4. You work directly with our project managers, architects, and consultants
5. After go-live, you gain a permanent, dedicated Client Success Manager advocating for you

Our Net Promoter Score is 73 — one of the best — backed by real feedback and rave reviews. And our support team consistently hits a 98% satisfaction rate.

> "Out of all vendors, only Softdocs took the time to understand our needs and have a conversation with no pressure for a sale. It was really comforting to us to know that a company took some time to invest in us."

Mike Mullenix, Business Applications Support Engineer
Education Affiliates

Dedicated Data Migration Services

Softdocs has helped hundreds of customers migrate from ImageNow/Perceptive Content, OnBase, Nolij, OpenText AppXtender, Laserfiche, Docusign, and others. Because of our experience with ImageNow and OnBase, we have dedicated, proprietary migration tools that elegantly transition data from those applications into the Etrieve platform.

1b+
documents migrated
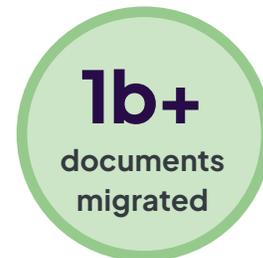
Customer Support

While companies like Hyland have shifted support offshore — leading to long delays and limited product knowledge — Softdocs has kept support onshore and close to home.

Our central, long-tenured team trains hands-on every week and uses a thoughtful, tiered triage approach to ensure your case reaches the right expert right away. You won't wait days for a call back or chase down answers. Instead, emails get answered, questions get solved, and you always know who's in your corner.

Softdocs support, service, and developmental engineers offer:

✓ **Rapid, responsive, and personable support with frequent touchpoints**
A dedicated support representative is assigned to each case, stays with it until it's resolved, and provides regular progress updates.

✓ **Practical solutions driven by deep expertise in education and government processes**
This helps organizations across the public sector create new workflows and design and implement forms that are highly effective and easy to use.

✓ **Collaborative processes that combine skill sets and knowledge on a case-by-case basis**
Support technicians collaborate to address issues and devise solutions that yield a lasting solution.

✓ **Access to decades of combined document management experience**
This in-depth industry knowledge enables schools to capture, process, and aggregate student information effectively. It also helps ensure tight integrations with the SIS and other student-related systems and business office applications.

✓ **Up-to-date knowledge on security and compliance**
Continual education from the team helps clients stay up-to-date with the latest regulatory changes and maintain the security of student and staff data.

Backed by a company committed to education and government, Softdocs support isn't just functional — it's personal, consistent, and refreshingly human.

Holding Ourselves Accountable: Customer Support KPIs

Category	Goal	2023	2024	2025
First Response	< 30 minutes	150 min	70 min	33 min
Customer Satisfaction	> 96%	95%	97%	98%
Average Resolve Time	< 3 days	6.06	4.54	3.5

Your Migration Roadmap

MONTH 1

Migration Kickoff

- Project welcome call and team introductions
- Environment provisioning and initial Etrieve installs
- Deployment call, SSO setup, and technical configurations mapping current OnBase environments
- Discovery preparations for in-scope departments

MONTH 2

Early Configuration

- Discovery sessions with departments reviewing existing OnBase Document Types, Workflow Queues, and User Groups/Security Roles
- Documentation delivered for review
- Initial Etrieve Document Management tree and security configuration aligned to OnBase Document Type Groups and Folder Structures
- Migration workbook created and first test imports analyzed against legacy OnBase indexing values

MONTH 3

Configuration and Testing

- Etrieve Document Management configuration finalized, including mapping from OnBase Document Types and keyword/folder metadata
- User Acceptance Testing (UAT)
- Migration test imports and validation against existing OnBase document retrieval/ search scenarios

MONTH

4

Migration and Core Training

- Pre-freeze export/import and validation from OnBase including mapping from OnBase Document Types and keyword/folder metadata
- Freeze migration export/import and final validation including OnBase annotations, version History, and audit trails where applicable
- Map OnBase's COLD/ERM architecture into the Softdocs cloud-native repository to preserve data integrity and eliminate the future need for IT to maintain COLD/ERM
- Administrator training for IT Admins transitioning from OnBase client-based admin to SaaS-based Etrieve management
- Content Go-Live with End User training for departments

MONTH

5

Rollout and Supplemental Training

- Supplemental solutions training highlighting key differences from OnBase
- Forms Training Phase 1: Discovery with admins and key users, including mapping from legacy OnBase Unity Forms to introductory Form Builder training

MONTH

6

Advanced Forms and Integration

- Forms Training Phase 2: Security, advanced form/workflow design transitioning from OnBase Workflow and Unity Scripts to Flow and API-driven logic, exporting to Content and taking forms live
- Integration & Connection Testing with Connect replacing legacy OnBase integrations with SIS/ERP
- Progress review: troubleshooting, refresher training, and design assessment

MONTH

7

Transition and Project Closure

- Final migration tasks completed
- Verification of retired OnBase environments
- Wrap-up of training and supplemental support
- Project closure and transition to ongoing support

Total Cost of Ownership

OnBase customers often find themselves facing escalating costs and complex maintenance that deliver little added value. Instead of investing in digital innovation, IT finds themselves dealing with upgrades, add-ons, and server upkeep just to keep the system running. That burden limits flexibility and dampens progress on new initiatives.

With the Etrieve platform, you're getting far more value: cloud-native NIST-certified environment, unlimited forms, unlimited e-signatures, cutting-edge AI-based capture, script-free workflow design, dashboards, mobile access, a robust API stack, and more.

Softdocs does not nickel-and-dime you for forced upgrades or hidden "gotcha" costs What you see is what you get. Straightforward and predictable licensing, fixed-fee implementation (really), and a cloud platform that keeps you updated and secure.

Even better, our roadmap is built for education and government. Our most recent release delivered more than 100 client-requested enhancements. That's the kind of return that goes beyond annual costs.
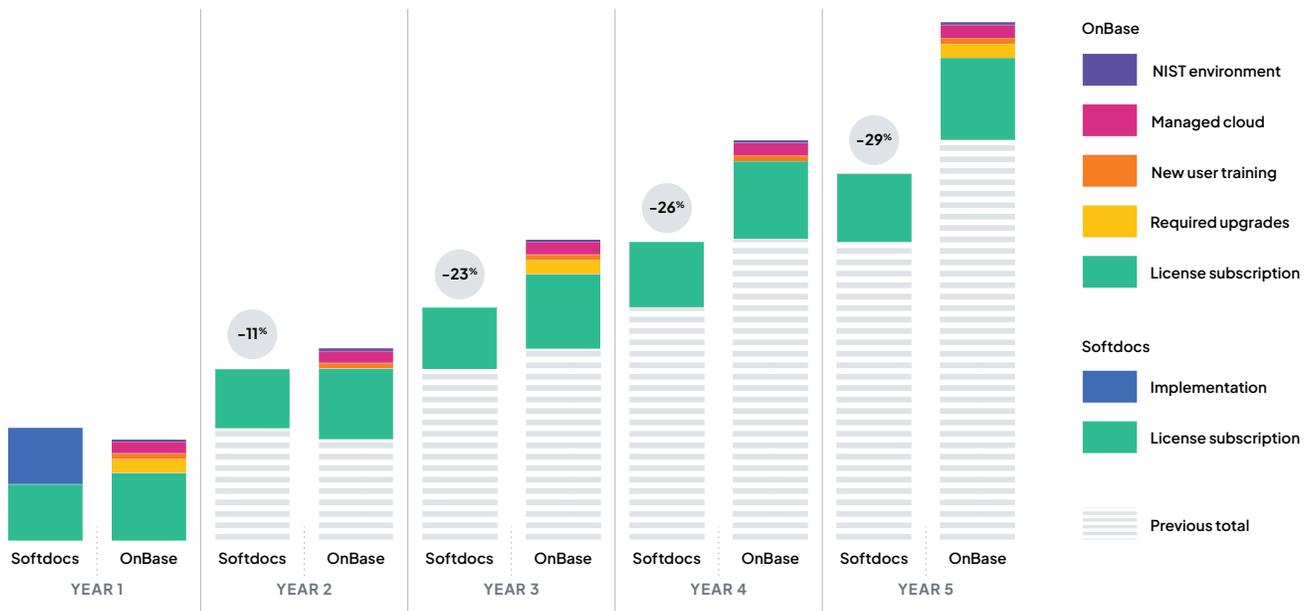
In this typical comparison, the five-year TCO for Etrieve delivers compounding returns. This does not factor in dedicated OnBase staff, server upgrades, and other material costs for running legacy on-premises software.

Migration Case Studies

UMass Global consolidated three previously separate systems into the Etrieve platform and **migrated 8.4 million documents** into a unified, searchable repository. They replaced more than 10 disparate forms with a single dynamic "super form" that adjusts based on user input, removing form sprawl and simplifying maintenance. Plus, integrated e-signature workflows reduced manual handoffs and expedited approvals.

The IT consolidation **eliminated multiple legacy licensing and maintenance costs**, significantly lowering total cost of ownership. UMass plans to automate contract generation using Workday data, apply retention policies per department, and build Power BI analytics dashboards on usage.

Integrations: Workday, Ellucian Banner, Salesforce

FDU built a consolidated digital ecosystem by deploying Etrieve across the campus, unifying forms, workflows, and document management. They developed over **70 dynamic forms** for an array of processes, including condensing more than 30 redundant forms with conditional logic. The move delivered **real-time dashboards** to track form status across departments, improved user experience through mobile-ready forms, unified branding, and removed envelope fees and multi-platform maintenance costs. FDU also eliminated limits in search and rigid indexing constraints inherent in their prior systems, giving users faster and more flexible access. The institution now gains a consistent, centrally managed interface across all departments.

Integration: Ellucian Colleague

OAKLAND COMMUNITY COLLEGE®

Oakland Community College achieved major gains by consolidating two legacy systems under Etrieve. They now process **over 100,000 forms per year**, saving 15,000+ labor hours annually, or the equivalent of five full-time staff. Their course change processing time dropped from more than 12 hours to under 1 hour. Institutionally, they experienced a **13.8% increase in enrollment and 12.7% increase in credit hours** taught, all without increasing their technology budget.

The upgrade also delivered mobile readiness, WCAG 2.2 accessibility compliance, elimination of paper handling, and reduced technology debt. The implementation supports integration with Ellucian Colleague SaaS via Ethos, eliminating duplicate data entry and streamlining cross-department workflow.

Integrations: Ellucian Colleague, Ethos

SHENANDOAH™ UNIVERSITY

Shenandoah implemented the Etrieve platform in phases across Admissions, Registrar, Advancement, Student Services, and Accounting. The platform's usability enabled users to adapt in less than a day, with features like bookmarking, custom searches, and intuitive indexing.

IT was **relieved of infrastructure overhead**, nightly updates, and server maintenance. The alignment of workflows, routing, and document storage improved cross-unit handoffs and reduced silos. The institution gained a scalable digital infrastructure that supports ongoing expansion of form/automation usage across campus.

Integration: Ellucian Colleague

Softdocs

The Etrieve platform from Softdocs is the leading document management and process automation solution for higher education, K-12 districts, and government agencies.

Many Softdocs customers choose our platform to replace outdated, legacy document management systems in order to gain modern features like workflow automation and no-code forms design.

Softdocs has helped more than 100 organizations migrate from ImageNow, OnBase, and others with more than one billion documents successfully moved.

Platform Overview

Document Management
Secure student records, HR, finance, and other documents within an integrated repository.

Workflow Automation
Design digital, no-code workflows to transform, simplify, and enforce key business processes.

User-Friendly E-Forms
Build user-friendly e-forms to securely and reliably capture precise key data.

Unlimited E-Signatures
Expedite approval processes with unlimited electronic signatures.

Intelligent Document Processing
Automate data extraction, classification, and validation for every captured document.

Intelligent Transcript Processing
Convert document-based transcripts into structured data with unprecedented speed and accuracy.

See it all in action:
softdocs.com