

Document & Workflow Automation for Human Resources

Upland's FileBound Increases HR Efficiency from Recruitment through Separation

Contribute to a corporate culture of efficient internal customer service without losing the human touch, by eliminating the manual processes that can take up much of an HR professional's work day.

FileBound document and workflow automation helps balance the need to secure and protect sensitive employee data with the need for managers, HR employees, auditors and employees themselves to have access to specific kinds of documents.

Electronic employee records consolidate documents from any source (e-mail, scanned documents, electronic forms, etc.) and organizes them in the way that meets your needs. Access controls can be put in place based on the role of the user. For instance, a payroll administrator can be granted rights to view documents related to his or her job, such as W-4s, but prevented from seeing disciplinary documents. Appropriate access can even be extended beyond the HR department to allow managers and employees to view the documents they need.

Instead of managing files and routing documents physically or via email, HR employees have more time to focus on work that is meaningful to the business, such as culture, retention initiatives and professional development. And HR management has better insight into process efficiency and productivity.

Benefits

- **Ensure** that employee records are complete, secure and disaster proof
- **Improve** response times to recruit first-choice candidates and retain top-tier candidates, retain quality existing employees, and keep employee morale high
- **Increase** HR productivity by decreasing time spent on low value tasks like record requests, employee time off requests, file audits and document routing
- **Respond** quickly and thoroughly to external audits of both records and processes with minimal impact on HR staff
- **Integrate** electronic employee records with existing HR software for a single view of all employee information: PTO accruals and requests, disciplinary records, annual review paperwork, and more
- **Automate** retention of documents and records according to internal policies and compliance requirements
- **Focus** more on people by promoting employee engagement and cultural enhancement, and spend less time on tedious paperwork and processes



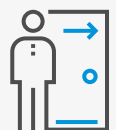
Applications



Onboarding



Employee Management



Terminations

Intuitive Search and Retrieval

Because documents are classified in the way that best meets your needs, HR employees can search using terms that make sense for them (e.g., employee number, review date, department) and have the results ordered the way they want with no customization.

Last Name	First Name	Department
Smith	Mike	Admin
McWilliams	Mitch	Sales
Spier	Kim	Sales
Johnston	Tom	Sales
Moyter	Dan	IT
Ruggles	Jacob	IT

Electronic Forms

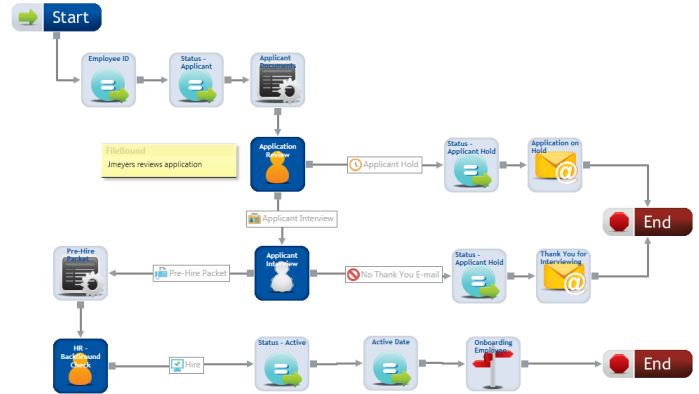
FileBound puts control of the solution into the hands of HR professionals with easy-to-configure capabilities such as drag-and-drop e-forms that can quickly be built or modified by non-technical employees.

About Upland Software

Upland Software (Nasdaq: UPLD) is an enterprise cloud software company that provides award-winning solutions in Project and IT Management, Workflow Automation and Digital Engagement. Our goal is 100% customer success, achieved through a unified operating platform that delivers the performance, scalability and support that over 2,500 Upland customers worldwide demand every day.

Workflow

Manual routing creates bottlenecks, takes time and increases the risk that sensitive documents will be lost or viewed by unauthorized employees. FileBound Workflow automation ensures that documents follow the appropriate process and escalates notifications when necessary.



Mobile Support

Support BYOD with a superior user experience, however and wherever users want to access FileBound. FileBound makes workflow seamless between full time, on-site employees, and freelance contractors across the globe.

