

## Document &amp; 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 organize 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 existing employees
- Increase HR productivity by decreasing time spent on low value tasks like record 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
- Automate retention of documents and records according to internal policies and compliance requirements
- Focus on people, not paper and processes

*"Before we had FileBound, we spent a lot of time pulling documents and copying them in response to requests. Now we have everything at our desktops and can send them electronically."*

— Donna Dertz, HR director  
St. Bernard Hospital and  
Health Care Center

## The Upland Product Family



*Automating the flow of work, connecting people through technology and bringing visibility to all aspects of the organization.*

Our family of products helps teams run their operations smoothly, adapt to change quickly and achieve more every day. Each product is built with a specific need in mind. See what you can do with Upland.



See how FileBound delivers game-changing results across the enterprise. Contact Genesis Technologies at [847-897-7235](tel:847-897-7235) or [dkoenig@genesistechnologies.com](mailto:dkoenig@genesistechnologies.com).

## 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 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.

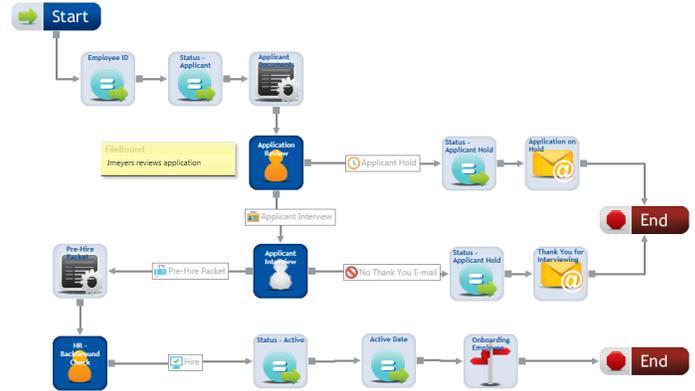
The screenshot shows a user interface for building forms. On the left is a 'Toolbox' with categories like 'Static Text', 'Input Fields', and 'Buttons and Actions'. On the right is a 'Preview' of a form titled 'Application for Employment' by Upland. The form has a header with the FileBound logo and title. Below is a section for 'Your Contact Information' with fields for First Name, Last Name, E-mail Address, and Phone. There are also text areas for 'Which position are you applying for?' and 'What programming languages are you proficient in?'. A final text area asks 'What other technologies do you have experience with?'. A 'Save' button is visible in the top left corner of the form builder.

## About FileBound

Upland's FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

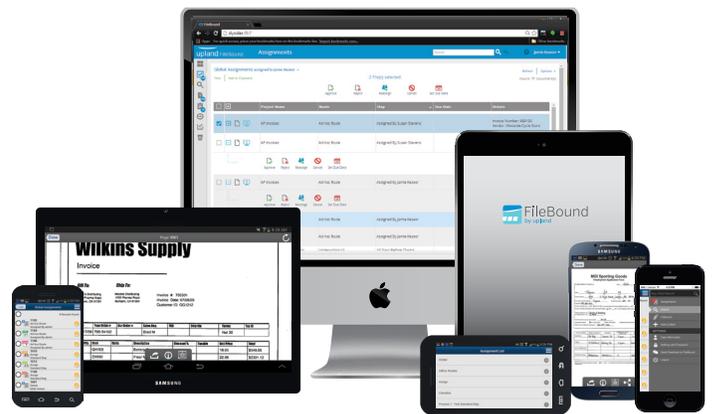
## Workflow

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, including apps for Android and iOS.



## About Upland Software

Upland is a leading provider of cloud-based Enterprise Work Management software. With more than 1,600 customers around the globe, and over 225,000 users, Upland helps teams in IT, marketing, finance, professional services and process excellence run their operations smoothly, adapt to change quickly and achieve better results every day.