

Human Resources and Processing Automation

Why Choose FileBound?

FileBound by Upland Software improves the operation of any organization by connecting users with the information they need to work more efficiently and effectively.

Benefits



Compliance

There are hundreds of rules and guidelines around how to properly file, secure, manage and destroy HR files. In FileBound, all employee records - including those containing protected information - can be stored in the same file where FileBound's granular security allows permissions to be set for specific users to access specific documents. These permissions ensure compliance with any audit and, having all employee documents housed in one enterprise-class application, allows for peace-of-mind and audit preparedness.



A Standard, Automated Process Across all Locations

Using FileBound, you can easily standardize hiring protocols and employment processes across every department and location. Your FileBound installation includes a complimentary performance review workflow that automatically notifies the manager and employee 28 days prior to review and sends out the templated materials for the manager to complete. After the meeting, the performance materials are reviewed by the department manager, employee, and HR and the employee's next review date is set. All documents, timelines and processes are consistently defined and assigned to the correct manager, regardless of department or location.



Host Employment Forms

Our Forms Portal can be used by employees and applicants alike. Your team has the ability to specify which forms can be viewed through the employment lifecycle - from applications for prospective employees and onboarding forms for new hires to annual reviews and vacation request forms for employees.



Swift Adoption

Our contemporary interface design makes it easy to adapt to automation technology and directs you immediately to your assignments upon login.

"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."

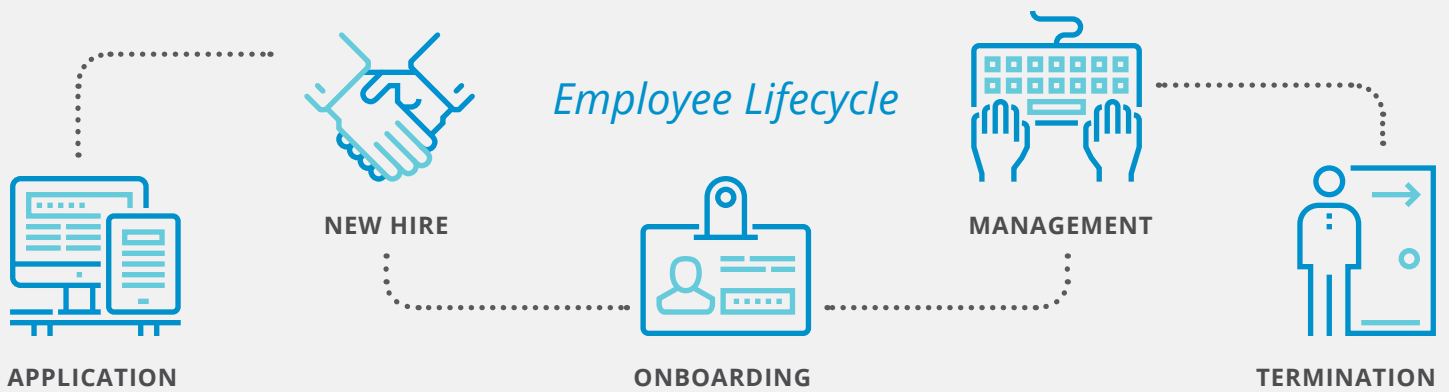
— Donna Dertz, HR director
St. Bernard Hospital and
Health Care Center



Upland Software provides Cloud Solutions across the enterprise enabling amazing customer outcomes in:

- + PROJECT & IT MANAGEMENT
- + WORKFLOW AUTOMATION
- + DIGITAL ENGAGEMENT

In addition to security, standardizing processes, hosting forms and promoting quick adoption, FileBound is an asset for every part of the Employee Lifecycle.



Applications and New Hires

FileBound's portal and assignment capabilities make both applying for a career and processing the application an easy, straightforward process. Applicants can access, download, modify and submit their applications using FileBound's Forms Portal while the HR and hiring teams can route, interview and approve new hires all right from within the system.

Employee Onboarding and Management

For every new employee added, FileBound can automatically create a set of onboarding documents required for each new hire and route them to the appropriate individuals or departments (e.g. IT, Facilities, etc.) to prepare for the new hire's first day. A checklist is created and monitored to ensure all documents and tasks are completed in a timely manner.

As the HR lifecycle progresses, the FileBound solution can be employed for everything from audit readiness to ensure documented processes are followed, to more service-on-demand scenarios where employees can make changes to benefit elections or request vacation.

Employee Terminations

Similar to the Onboarding process, when an employee is terminated, FileBound can create the necessary documents and checklists that ensure that not only the employee's files are handled properly, but also that their security and system rights have been disconnected. All tasks are assigned and tracked within the system while a master checklist monitors and displays all completed and outstanding assignments.

Customized Workflows

Any process centered around a document or form can be streamlined in FileBound for added efficiency and security. In addition to performance reviews, other processes like vacation requests, a change in benefit elections, employment satisfaction surveys, and more can all be stored, automated, tracked and reported on from FileBound.

About Upland Software

Upland Software (Nasdaq: UPLD) is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments, automate document-intensive business processes and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 2,000 customers and over 235,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day. Learn more at uplandsoftware.com