

## Document & Workflow Automation for Higher Education

# Electronic Processes Increase Student Service Levels, Reduce Costs

Even as students have higher expectations from their college experiences, most institutions are struggling with budgets and staffing. FileBound document and process automation helps colleges and universities attract and retain students by reducing expenses and increasing productivity in the business office while improving student-facing services.

Colleges and universities around the country use Upland's FileBound to manage everything from enrollment services, student health and housing processes to grant management, contracts and back-office operations. These institutions selected FileBound because it delivers enterprise-class functionality that is easy to use and affordable.

## Benefits

- **Decreasing the amount of time spent** on business office and other back-office activities reduces operating expenses, freeing money to be spent on more strategic projects to advance the institution
- **Improving student service and enrollment management processes**, such as processing financial aid applications more quickly, increases the odds of attracting and retaining first-choice candidates
- **Integration** with student information systems (SIS), accounting software, human resources applications and critical systems supports end-to-end efficiency and reduce data entry
- **Cloud-native application** offers affordability, security, disaster recovery and reduced reliance on IT
- **Empowers administrators and staff** to be more nimble and collaborative by removing manual and paper-based processes and enabling anytime, anywhere access, document sharing and more

*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.*

### The Upland Product Family

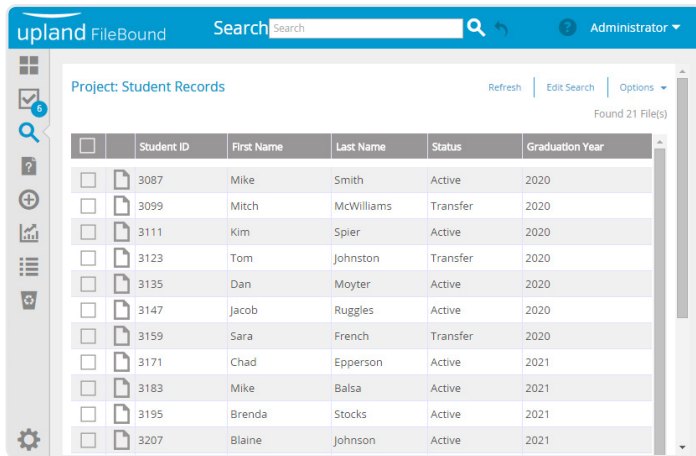


*Automating the flow of work, connecting people through technology and bringing visibility to all aspects of the organization.*

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.

## Intuitive Search and Retrieval

Whether you're managing enrollment documents, vendor invoices or maintenance contracts, documents are classified the way you want them and available with just a few clicks.

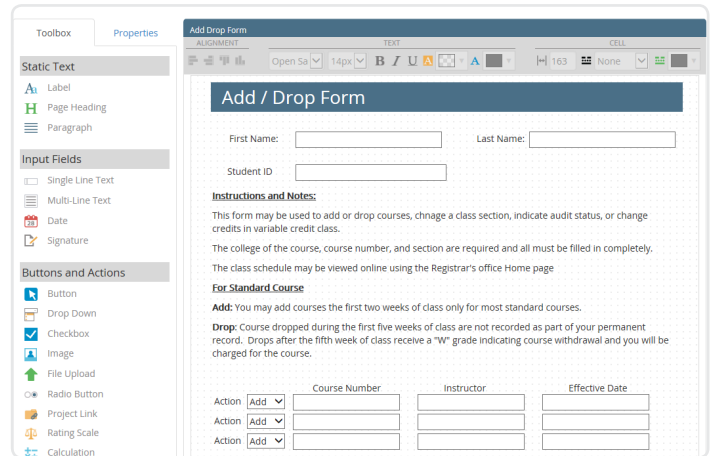


The screenshot shows the 'upland FileBound' search interface. At the top, there is a search bar and a dropdown menu for 'Administrator'. Below the search bar, the results are displayed for 'Project: Student Records', showing 'Found 21 File(s)'. The results are in a table with columns: Student ID, First Name, Last Name, Status, and Graduation Year.

	Student ID	First Name	Last Name	Status	Graduation Year
<input type="checkbox"/>	3087	Mike	Smith	Active	2020
<input type="checkbox"/>	3099	Mitch	McWilliams	Transfer	2020
<input type="checkbox"/>	3111	Kim	Spier	Active	2020
<input type="checkbox"/>	3123	Tom	Johnston	Transfer	2020
<input type="checkbox"/>	3135	Dan	Moyter	Active	2020
<input type="checkbox"/>	3147	Jacob	Ruggles	Active	2020
<input type="checkbox"/>	3159	Sara	French	Transfer	2020
<input type="checkbox"/>	3171	Chad	Epperson	Active	2021
<input type="checkbox"/>	3183	Mike	Balsa	Active	2021
<input type="checkbox"/>	3195	Brenda	Stocks	Active	2021
<input type="checkbox"/>	3207	Blaine	Johnson	Active	2021

## Easily Configurable E-forms

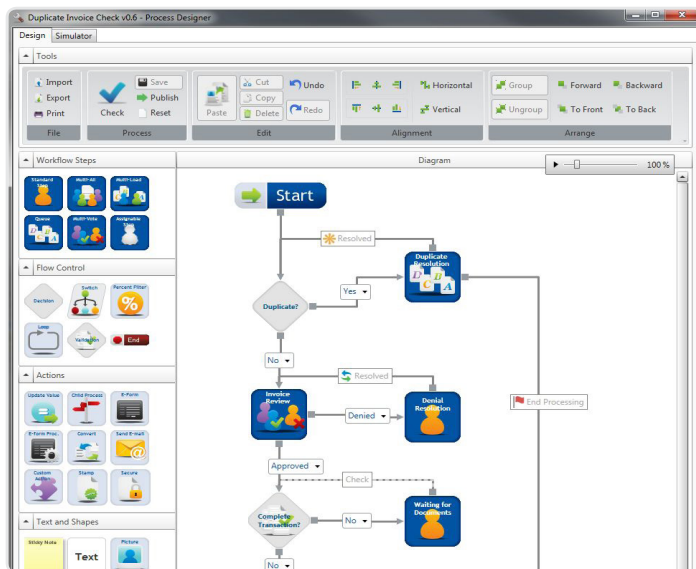
Drag-and-drop form creation tools allow business users to create forms that can be used for student services, internal business processes or public-facing websites.



The screenshot shows the 'Add Drop Form' configuration interface. On the left is a 'Toolbox' with categories: Static Text (Label, Page Heading, Paragraph), Input Fields (Single Line Text, Multi-Line Text, Date, Signature), and Buttons and Actions (Button, Drop Down, Checkbox, Image, File Upload, Radio Button, Project Link, Rating Scale, Calculation). The main area shows a form titled 'Add / Drop Form' with fields for 'First Name', 'Last Name', and 'Student ID'. Below these are 'Instructions and Notes' and a section for 'For Standard Course' with 'Add' buttons for 'Course Number', 'Instructor', and 'Effective Date'.

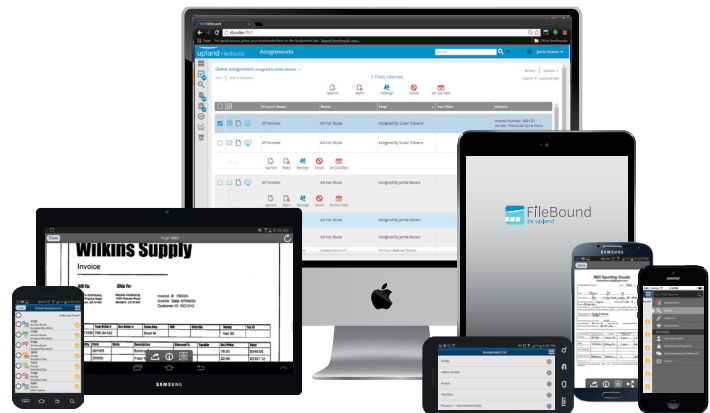
## Workflow Automation

Eliminate inefficient email or manual routing of documents that need to go through processes such as approval or review, such as student admission or financial aid applications, grant documentation, vendor invoices or contracts.



## Mobile Support

Allow students, faculty and administration to interact with FileBound using virtually any device, 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 enterprise 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. Contact us at 855-944-7526 or [info@uplandsoftware.com](mailto:info@uplandsoftware.com).