



# The LBI HR HelpDesk

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**The Features of a Solution Engineered to Empower  
Employees and Maximize HR in Companies of Any Size**

# LBI HR HelpDesk – Uniquely Designed to Serve HR

LBI HR HelpDesk is an innovative case manager and call-tracking workflow solution with a unique, tiered pricing structure and four versions designed to appeal to companies of any size.

- **Multiple means for privacy and confidentiality**
  - » Case visibility can be designated in one of three ways: **Normal** (any user may access and take action), **Protected** (any user may view, but only authorized users may open, edit or close the case), or **Confidential** (visible and accessible strictly to authorized users)
  - » Employees can request the way they wish to be notified of changes in a case (email, in person, by phone, etc.)
  - » Employees may request notification by an email to their personal email address or in a hard-copy letter to their home
- **User-defined roles and rights for system access**
  - » Assign cases by roles (e.g., administrator, manager, customer service representative/agent, etc.)
  - » Assign cases by organizational level (e.g., department, division, case category, etc.)
  - » Assign options for reassigning, escalating, reopening, deleting a case, etc.
- **Workflow configured to your organization's HR processes and procedures**
  - » Easily search by case number, employee's Social Security number, company ID number or last and first name, or by "sounds-like"
  - » Create new cases through the employee portal or HR portal, by email or by CTI/IVR (phone) integration
  - » Allow auto-assignment of cases to a specific user or group and based on your organizational and workflow structure
  - » Balance caseloads – select to automatically assign each new case to the group member with the lightest current caseload
  - » Assign non-critical cases to a "bucket" group; group members periodically review the "bucket cases," act on open files and efficiently empty the queue
  - » Variably designate who can escalate and/or reassign cases, such as by user role, location, department, category or subcategory within the organization, etc.
- **Easily display priorities for each user through LBI's exclusive Clipboard, a simple and powerful filtering function that allows users to select their own "to-do" items from the complete list of open tasks they may be responsible for**
  - » Select specific records for bulk action (e.g., reassignment, mark as urgent, etc.)
  - » Give authorized users speedy, two-click access to the caseloads of other users
  - » Customize with the Aging Utility – include or exclude holidays and weekends, hours or days, and set business hours
  - » Send follow-up reminder notifications
  - » Create custom workflow tasks on the fly ... or by pre-defining tasks based on the type of case
  - » Easily reassign cases on the fly ... or pre-schedule case reassignments to account for planned absences
  - » Open cases on behalf of another user
- **Efficient, confidential employee-HR interactions**
  - » Communicate with employees and HR users without the need for email, ensuring privacy
  - » Maintain a complete record of employee and HR conversations for cases directly within LBI HR HelpDesk
  - » Attach documents related to any interaction
- **Very easy to use, minimal training for the employee or the HR team member**
  - » User interface is tuned for widescreen viewing
  - » Special version is available for browsers on mobile devices

**CUSTOMIZE**  
*to fit your needs for*  
**PROCESS,  
PRIVACY AND  
PERSONNEL**

## **MULTIPLE TIERS FOR CLIENTS OF ANY SIZE**

### *Free*

- Up to 100 employees

### *Pro*

- Up to 500 employees

### *ProPlus*

- Up to 2,000 employees

### *Enterprise*

- Any size

## **The Technology – An Incredibly Adaptable Solution**

- **Integrates with any major HRMS**
  - » Populate HR HelpDesk employee records in real time with an HRMS master file data (e.g., job title, ID number, date of birth, last four digits of Social Security number, personal email address, emergency contact, etc.)
  - » Integrate data using Web services, database view, a flat file, database integration, or import the employees yourself
- **Integrates with most email systems**
  - » Seamlessly integrate with Microsoft Exchange, Lotus Notes, etc.
- **Links with employee records in other systems**
  - » Efficiently and securely link with employee records in ADP, talent management systems, etc.
- **100 percent Java, totally mobile**
  - » Runs in all major Internet browsers, plus on Apple iPhones/iPads, Androids, etc.
  - » Requires no plugins (doesn't require ActiveX, Flash, Silverlight, etc.)
  - » Offers mobile device Employee Portal version
  - » Separate CSR screens are tuned for mobile browsers, giving customer service representatives full view of all case details and all related employee information
- **SaaS cloud hosting**
  - » Multitenant application architecture
  - » Separate database schemas
  - » Seamless upgrades
- **Optional on-premise or hosted deployment**
  - » On-premise deployment available with a licensing agreement
  - » Hosting by LBi available on a dedicated server or as a cloud-hosting option
  - » Single-tenant application ensures your data is not mingled with or accessible to outside organizations
- **HR-focused data security**
  - » Supports Single Sign On (SSO)
  - » Two-factor authentication
  - » Employs data encryption at rest
  - » Offers password encryption
  - » Offers VPN-encrypted access
- **Out-of-the-box or custom deployment**
  - » LBi is staffed to support customized client deployments
  - » Service and support offers a full upgrade path for every installation
- **Comprehensive online Help at every screen**
- **Open source tools – no expensive external licenses**
- **Completely and professionally supported by experienced LBi staff**

## The Knowledge Base – Integrated and Sophisticated

- **Two searchable knowledge bases**
  - » **Common Problems Knowledge Base** – Your repository of frequently asked questions. Import your existing FAQ database or create and continuously update one on the fly, using the “Submit as a Common Problem” checkbox on each Case Entry screen
  - » **Wiki Knowledge Base** – The text of all of your corporate HR documentation, indexed and categorized for easy search and retrieval
  - » Expanded knowledge base search options
  - » Instructional videos for more-informed usage
  - » Secure, HR-only access for system administrators for selected documents, searchable by category (e.g., templates for form letters, recommended responses to sensitive issues, etc.)
- **Document Repository (File Cabinet)**
  - » Stores all of your original HR documents in a Windows Explorer-style view for easy search and retrieval
  - » Can include PDFs, Word documents, forms, etc.
  - » Accepts unlimited documents as attachments to cases
  - » For advanced document management, LBi offers integration with Perceptive Software or Microsoft SharePoint

## Search Functionality – Powerful and Fast

- **Search for any case or set of cases based on any field, including text fields**
  - » Find cases by any combination of employee name, date range, assigned user, case category, problem or resolution text fields, location, status, etc.
- **LBi HR Help Desk maintains a permanent history of all case records**
  - » Small record size ensures no need to purge old records unless desired

## Reporting Features – Robust and Tailored to HR’s Needs

- **Take advantage of a wealth of standard reports**
  - » Case Status and Case Detail
  - » Case Audit Trail
  - » CSR/Agent Effectiveness
  - » Case Ownership
  - » Open Cases
  - » Overdue Cases
  - » Aging of Cases
  - » Case Transfer Report
  - » Escalated Cases Report
  - » Days Open
  - » Urgent Cases
  - » Employee Survey Results
  - » Departmental/Divisional Analysis
  - » Case Category Analysis
  - » Case History Detail
  - » Employee Log-ins
  - » Knowledge Base Feedback
  - » Quick Answers
  - » Employee Grievance Audits
- **Create, name and save customized ad hoc reports as you go**
  - » Select report fields from among dozens of criteria
  - » Filter a new report and save it with a custom name
  - » Publish reports to others or save as private
- **Schedule reports to run automatically and to select recipients**
- **Save fully formatted reports in most major file types (PDF, Word, Excel, PowerPoint, etc.)**
- **Extract data extremely easily for ad hoc reporting by non-technical users**
- **Leverage the Executive Dashboard for comprehensive analytics**
  - » Nine customizable widgets and multiple chart graphics options
  - » One-click access to underlying data
  - » Improved features in LBi HelpDesk Version 5.0

## Additional Features – Truly Complementing Talent Management

- Brand to your company logo and screen colors
- Add and maintain non-HRMS employee users directly within the system (e.g., 1099 employees, retirees, terminated workers, etc.)
- Link to an employee's Facebook, Twitter, or other social media account
- Create customized alerts (i.e., global-based, division-based, or department-based employee messages)
- Learn from the Employee Feedback (survey) feature
- Add free-form notes to individual case records or to the employee master record
- Heighten engagement with multi-language options

FEATURES	<i>LBi HR HelpDesk Free</i>	<i>LBi HR HelpDesk Pro</i>	<i>LBi HR HelpDesk ProPlus</i>	<i>LBi HR HelpDesk Enterprise</i>
Number of employees supported	Up to 100	Up to 500	Up to 2,000	Unlimited
Number of admin/HR staff supported	2	10	20	Unlimited
Issue resolution workflow in the cloud via a premium SaaS solution	●	●	●	●
Case confidentiality	●	●	●	●
Mobile browser compatibility	●	●	●	●
Employee interactions and notifications via email	●	●	●	●
Automatic escalations	●	●	●	●
User-defined tasks	●	●	●	●
Advanced search and query	●	●	●	●
Linking multiple cases	●	●	●	●
Attach files to cases	●	●	●	●
Support level	Self-service Ticket Form Entry	Self-service Ticket Form Entry and Email	Self-service Ticket Form Entry and Email	Self-service Ticket, Email, and 24/7 Phone
Employee self-service portal		●	●	●
FAQ Knowledge Base		●	●	●
Instructional videos and product user guides		●	●	●
Real-time case history		●	●	●
Analytical reporting and export tool		●	●	●
Employee interactions via social collaboration tool		●	●	●
Executive dashboard			●	●
Employee feedback survey			●	●
Ad hoc reporting and scheduling			●	●
Document repository			●	●
Customizable aging utility				●
Single Sign-on (SSO) support				●
Corporate branding				●
Real-time HR/ERP integration				●
Seamless enterprise email integration				●
Customizable workflow				●
Employee social media reporting				●
Wiki knowledge base				●
Advanced document management (Perceptive or SharePoint integration)				●
Multiple-language support				●
For maximum security, optional hosting on a dedicated physical server				●
Optional two-factor authentication				●
Optional on-premise hosting/licensing				●

## ***About LBi Software***

LBi Software provides precisely engineered, customer-focused human resources technology solutions developed from more than 30 years of experience in HR technology and HR processes. Our flagship solution, LBi HR HelpDesk, is an innovative case manager and call-tracking workflow solution that creates a rich and powerful knowledge base on the fly, with a unique, tiered pricing structure that appeals to companies of any size. Our organic belief in – and solid reputation for applying – a true client-vendor partnership on every project ensures a highly configurable solution for businesses with as few as 50 employees or more than 50,000, always designed to put the power in the hands of the employee. In addition, every LBi project is supported by our rich experience and expertise in Mobile Development, Business Intelligence, Data Warehousing, and Reporting and Analytics.

***LBiSoftware.com***

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LBi Software is headquartered in Melville, N.Y., and is online at [LBiSoftware.com](http://LBiSoftware.com).

LBi Software  
999 Walt Whitman Road  
Melville, NY 11747  
Phone: 516-921-1500  
Fax: 516-921-1897

Email: [ProductManager@LBiSoftware.com](mailto:ProductManager@LBiSoftware.com)

