
LBi HR HelpDesk:

USING THE FAQ KNOWLEDGE BASE, DOCUMENT REPOSITORY, AND WIKI KNOWLEDGE BASE

FREE



PRO



PROPLUS



ENTERPRISE

Using the FAQ Knowledge Base, Document Repository, and Wiki Knowledge Base

LBI HR HelpDesk offers several powerful features designed to give employees and the HR staff easy access to a range of information. One of the most commonly used among those features is a knowledge base of frequently asked questions, problems, and resolutions that's available in the Main Application and through the Employee Portal. It's easy to set up and use, and the information is quickly updated as new issues arise.

The Document Repository and Wiki Knowledge Base, meanwhile, provide quick access to company documents, forms, policies, and procedures. For more advanced document management needs, LBI provides a solution in partnership with Perceptive Software (a Lexmark company) that lets HR staff control, monitor, and track access to documents thanks to an enhanced search capability within a highly secure system.

This document gives you the information you need to set up and use these valuable resources within the LBI HR HelpDesk system.

A. FAQ Knowledge Base (available in Pro, ProPlus, and Enterprise)

B. Document Repository (available in ProPlus and Enterprise)

C. Wiki Knowledge Base (available in Enterprise)

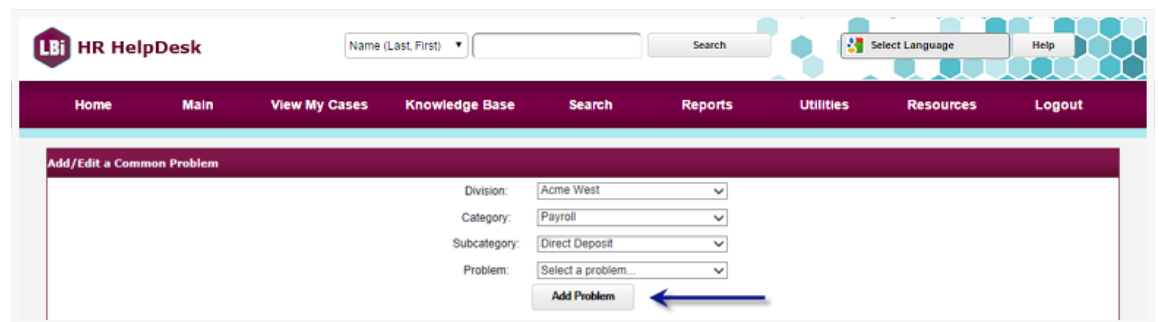
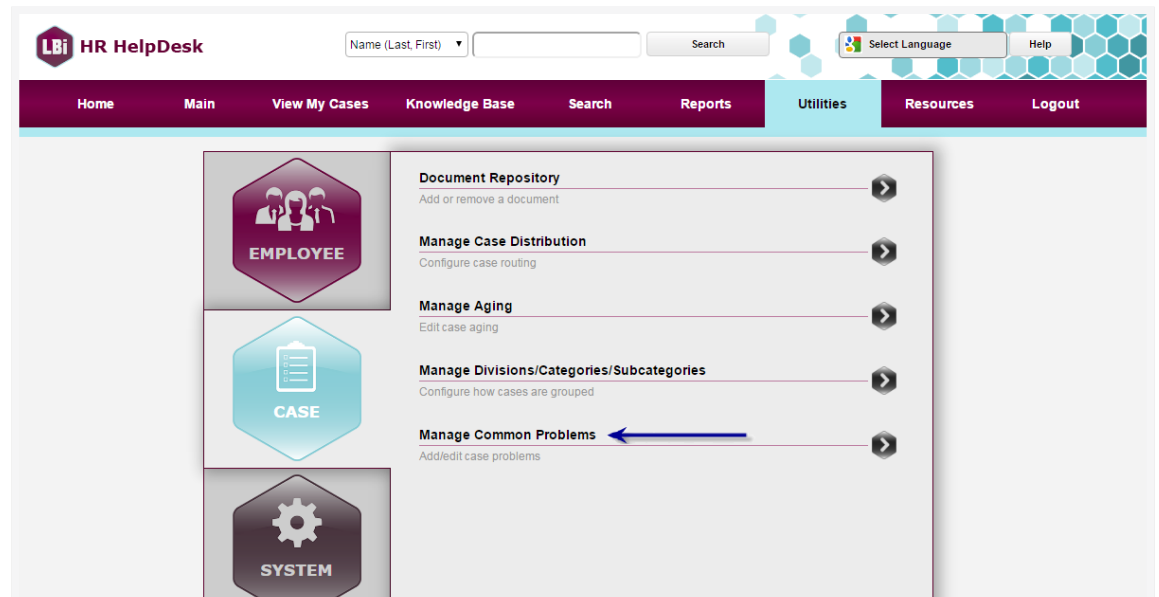
A. Common Problems – Knowledge Base

(available in Pro, ProPlus, and Enterprise)

Using the Manage Common Problems Utility, administrators can maintain a list of common problems and their resolutions within a Division/Category/Subcategory structure. New problems and resolutions can be added, and existing ones can be edited or removed.

Common Problems display on the New Case Entry screen and are available from the Knowledge Base menu option. If the “Display in Employee Portal” box is checked, the common problem/resolution will be available for employees to view when they’re logged in to the Employee Portal. Common Problems can be added to All Divisions when created.

1. Click “Utilities” in the main menu and select the “Case” tab. From there, select “Manage Common Problems”.
2. Select desired parameters from the dropdowns and click the “Add Problem” button.



3. Enter the Problem Name.

4. Enter a description of the problem (in the “Problem” tab) and the resolution, if available (in the “Resolution” tab). Format the text as desired.

5. Select the “Display in Employee Portal” option if you want this specific Common Problem to be visible to employees when they log in to the Employee Portal.

6. This Common Problem/Resolution will be available within all Divisions of the system’s case hierarchy.

7. Click the “OK” button.

8. Click the “Save” button on the prompt.

The screenshot shows the LBI HR HelpDesk interface. At the top, there is a navigation bar with links: Home, Main, View My Cases, Knowledge Base, Search, Reports, Utilities, Resources, and Logout. A search bar and a 'Select Language' dropdown are also present. The main content area is titled 'Add/Edit a Common Problem'. It contains several dropdown menus for 'Division' (Acme East), 'Category' (Benefits), 'Subcategory' (Dental), and 'Problem' (Braces). Below these is an 'Add Problem' button. A tabbed interface shows 'Problem' and 'Resolution' tabs. The 'Problem' tab is active, displaying a text area with the text 'Are braces covered?' and 'Invisalign?'. A 'Display in Employee Portal' checkbox is checked. At the bottom, there are 'Ok', 'Cancel', and 'Remove' buttons.

Common Problems are displayed in the following three sections of the system:

1. New Case Entry Screen

New Case Entry for Jones, Mary

Division:
Acme East
Acme South
Acme West
Others
South
West

Category:
Benefits
Medical
Payroll

Subcategory:
Dental
Medical
Other

Common Problems (click to use)
Braces
Crowns
Dentures

Problem: Are braces covered? Invisalign?
Resolution: No

Problem | **Resolution** | **Notes** | **Tasks**

Format | B | I | U | ABC | [List Icons] | [Link Icons]

Assign Case To: Use Auto-Assignment Rules (Assign Case To Me)
Case Received Via: Phone **Length of Call:** Not Specified
EE Response Via: Phone
Follow-up Date:
Visibility: Normal
Priority: Normal
CC Emails:
Escalate To: Manager
Common Problem: ☐

Logout

7600 Jericho Turnpike
Suite 201
Woodbury, NY 11797
US
(516) 921-1500

New C

Owner
James, Lebron
James, Lebron
Balmer, Steve
Payroll

2. FAQ Knowledge Base

The screenshot shows the 'Knowledge Base' section of the LBI HR HelpDesk. The top navigation bar includes 'Home', 'Main', 'View My Cases', 'Knowledge Base' (highlighted with a blue circle), 'Search', 'Reports', 'Utilities', 'Resources', and 'Logout'. The 'Knowledge Base' section has three dropdown menus for 'Division:', 'Category:', and 'Subcategory:'. The 'Division:' dropdown lists 'Acme East', 'Acme South', 'Acme West', 'Others', 'South', and 'West'. The 'Category:' dropdown lists 'Benefits', 'Medical', and 'Payroll'. The 'Subcategory:' dropdown lists 'Direct Deposit' and 'Investment'. Below these, the 'Problem' section shows 'Routing Number' and 'Timing for Direct Deposit' (highlighted in blue). The 'Description' section contains the text 'When does my paycheck get deposited into my account?'. The 'Resolution' section contains the text 'Direct Deposit funds are available on the 1st and 15th of each month.'

3. Employee Portal

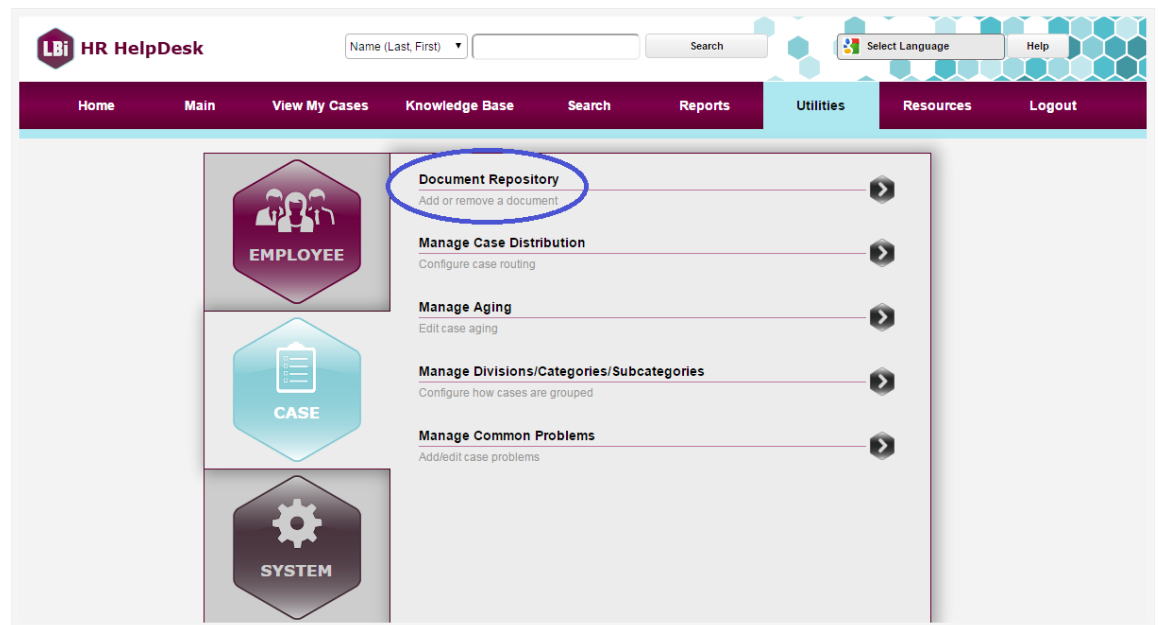
The screenshot shows the 'Employee Portal' section of the LBI HR HelpDesk. The top navigation bar includes 'LBI HR HelpDesk Employee Portal', 'Select Language', and icons for user profile, notifications, and help. The 'Create a New Case' section has three dropdown menus for 'Select:', 'Benefits', and 'Dental'. Below these, the 'Common Issues that Match your Selection' section lists two categories: 'Braces' and 'Crowns'. The 'Braces' category shows the problem 'Are braces covered?' and the resolution 'No'. The 'Crowns' category shows the problem 'Are crowns covered?' and the resolution 'Yes, every 5 years'. Blue arrows point to the 'Resolution' text for both categories. The bottom of the page features a blue bar with the number '6'.

B. Document Repository (available in ProPlus and Enterprise)

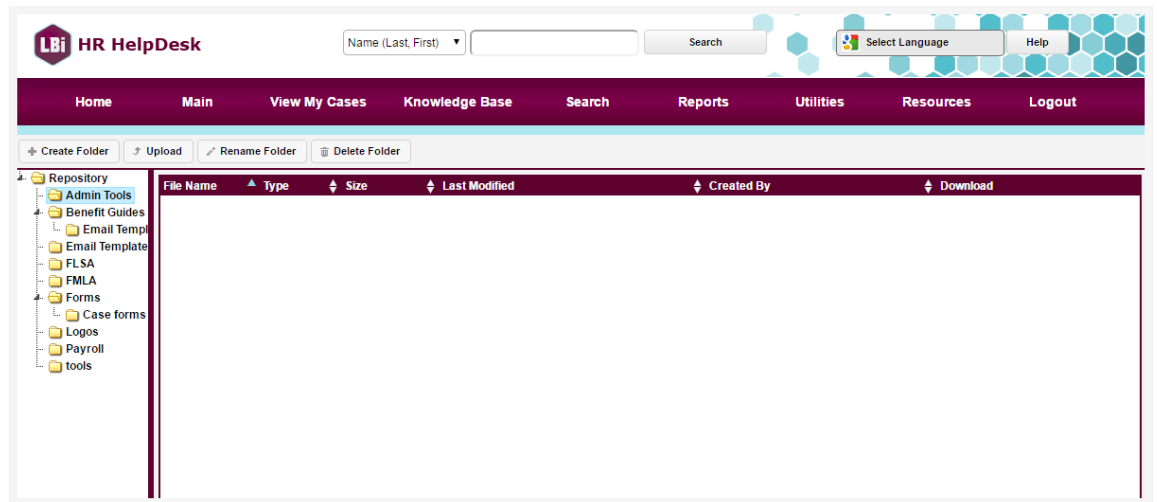
This section of the LBi HR HelpDesk lets you store and organize commonly used forms, documents, and reference materials. Administrators can create folders and subfolders, and upload a variety of file types for easy access. Documents can be attached to cases and can be included using the “Interactions” function and email.

Managing the Document Repository

1. Select the “Document Repository” option in the “Case” tab of the Utilities menu.

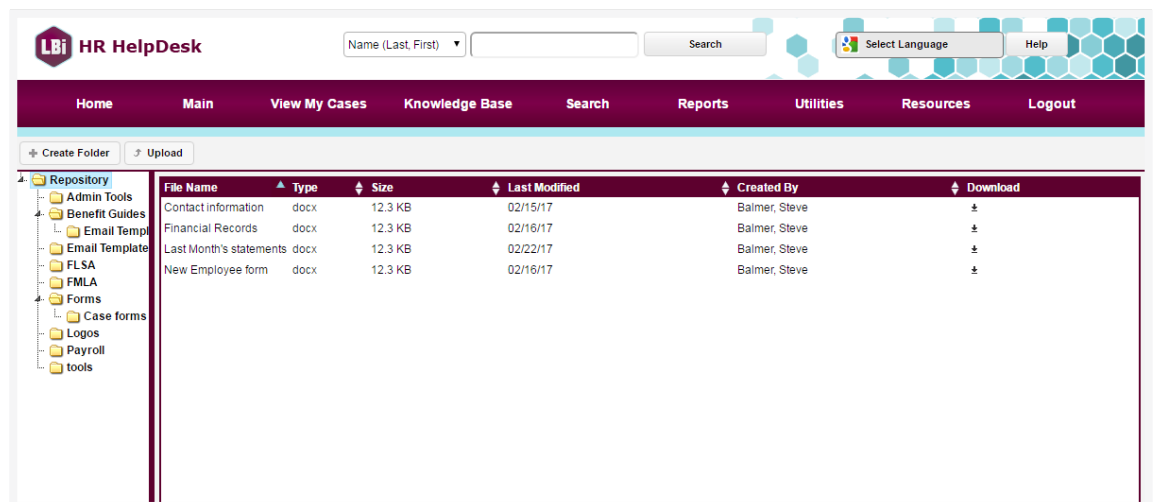


2. Use the “Create Folder” and “Upload” buttons at the left to add folders and documents.



3. Use the “Rename Folder” and “Delete Folder” buttons to manage folders.

Note: Folders cannot be deleted if they contain documents.



4. Click on the column headings to sort the files by name, type, size, the last date the file was modified, and who created the file.

5. Select the document to display the “Rename,” “Delete,” and “Download” buttons.

6. Select the document to display the file information.

Advanced Document Management

In partnership with Perceptive Software (a Lexmark company), LBi provides a comprehensive, world-class document and knowledge management solution for organizations that require advanced content management features. These can include check-in/check-out, version control, automatic expiration dates, global search-and-replace, and much more.

Integrating LBi HR HelpDesk with Perceptive solutions, HR departments can control and monitor access to secure documents, track and analyze document access, and provide enhanced document search capability, all in a powerful, easy-to-use, highly secure system.

The screenshot displays the LBi HR HelpDesk interface. At the top, there is a header with the LBi logo, the text "HR HelpDesk", a search bar, and a "Select Language" button. Below the header is a navigation bar with links: Home, Main, View My Cases, Knowledge Base, Search, Reports, Utilities, Resources, and Logout. Under the navigation bar, there is a toolbar with buttons: Create Folder, Upload, Rename, Delete, and Download. The main content area is divided into two sections. On the left is a "Repository" tree view showing a hierarchy of folders: Admin Tools, Benefit Guides, Email Template, FLSA, FMLA, Forms, Case forms, Logos, Payroll, and tools. On the right is a table listing documents. The table has columns: File Name, Type, Size, Last Modified, Created By, and Download. The table contains four rows of data. Below the table, there is a section for "Contact information" with "Created By: Balmer, Steve" and buttons for Download and Delete.

File Name	Type	Size	Last Modified	Created By	Download
Contact information	docx	12.3 KB	02/15/17	Balmer, Steve	Download
Financial Records	docx	12.3 KB	02/16/17	Balmer, Steve	Download
Last Month's statements	docx	12.3 KB	02/22/17	Balmer, Steve	Download
New Employee form	docx	12.3 KB	02/16/17	Balmer, Steve	Download

Contact information Created By: Balmer, Steve Download Delete

C. Wiki Knowledge Base (available in Enterprise)

The Wiki Knowledge Base gives employees and HR staff members easy access to the text of corporate documentation using a searchable engine in a format and style similar to using Windows Help.

Policies, procedure manuals, benefits guides, forms, calendars, contact information, and many other informative documents can be made available in the Main Application and/or the Employee Portal and are categorized in a format for quick reference.

Accessing the Wiki Knowledge Base

1. From the Employee Portal, click the “Knowledge Base” button.

Case #	Open Date	Close Date	Division	Category	Subcategory	Case Opened Via	Interactions	Cancel Case
263	05/11/2017	Pending	Acme East	Payroll	Direct Deposit	EePortal	1 (1)	<input type="checkbox"/>
261	05/03/2017	Pending	Acme East	Benefits	Dental	EePortal	0	<input type="checkbox"/>
246	03/17/2017	Pending	Acme East	Medical	Other	EePortal	0	<input type="checkbox"/>
205	01/12/2017	Pending	Acme East	Benefits	Dental	Phone	2	<input type="checkbox"/>

2. From the Main Application, select the “Knowledge Base” option on the menu bar.
3. Click the “View Additional Documentation” button.
4. On the New Case Entry screen, select “View Additional Documentation.”

The screenshot shows the LBI HR HelpDesk Knowledge Base interface. At the top, there is a navigation bar with links: Home, Main, View My Cases, Knowledge Base (highlighted), Search, Reports, Utilities, Resources, and Logout. Below the navigation bar, there is a search bar and a "Select Language" dropdown. The main content area is titled "Knowledge Base" and contains three dropdown menus: "Division:" (with options: Acme East, Acme South, Acme West, Corporate Office, Others, South, West), "Category:" (with options: Benefits, Dental, Medical, Other), and "Subcategory:" (with options: 401K, Dental, Medical, Other). Below these dropdowns, there is a "Problem" section with a list of issues: Crowns, Dentures, and Eligibility. To the right of the "Problem" section, there is a "Description" field with the text "Are crowns covered?" and a "Resolution" field with the text "Yes, every 5 years." A blue arrow points to the "View Additional Documentation" button located above the "Knowledge Base" section.

The screenshot shows the LBI HR HelpDesk Employee Portal "Create a New Case" interface. At the top, there is a navigation bar with links: LBI HR HelpDesk Employee Portal, Select Language, and user icons. The main content area is titled "Create a New Case" and contains three dropdown menus: "Select:" (with options: Acme West, Benefits, Dental), "Benefits", and "Dental". Below these dropdowns, there is a "View Additional Documentation" button. A blue arrow points to this button. Below the button, there is a section titled "Common Issues that Match your Selection" with two links: "> Crowns" and "> Eligibility". At the bottom, there are two buttons: "Create a New Case" and "Expand All".

Using the Wiki Knowledge Base

The Wiki Knowledge Base has a similar layout to the Help screens, with the content navigation panel and tabs on the left side and the content documentation panel in the center.

Content Navigation Tabs

- ◆ **Contents** – displays the topics and documents in folder format
- ◆ **Index** – displays a list of all topics and documents within the Knowledge Base that can be selected, for easy access
- ◆ **Search** – allows the user to locate information using keywords

New Case Entry for Romano, Kim

Division: Acme East, Acme West

Category: Benefits, Compensation, Disability STD/LTD, Disciplinary, Disputes, HRIS, Internal Issues, Other

Subcategory: 401K, Deductions, Enrollment, FMLA Requests, FSA, Maternity Leave, Open Enroll. Login, Other

Common Problems (click to use)
401K % Change
401k Deduction Amount Changes
Company Match

[View Additional Documentation](#)

Problem | Resolution | Notes | Tasks

Format | B | I | U | ABC | [Icons]

Assign Case To: Use Auto-Assignment Rules (Assign Case To Me)

Case Received Via: Phone **Length of Call:** Not Specified

EE Response Via: Phone

Follow-up Date:

Visibility: Normal

Priority: Normal

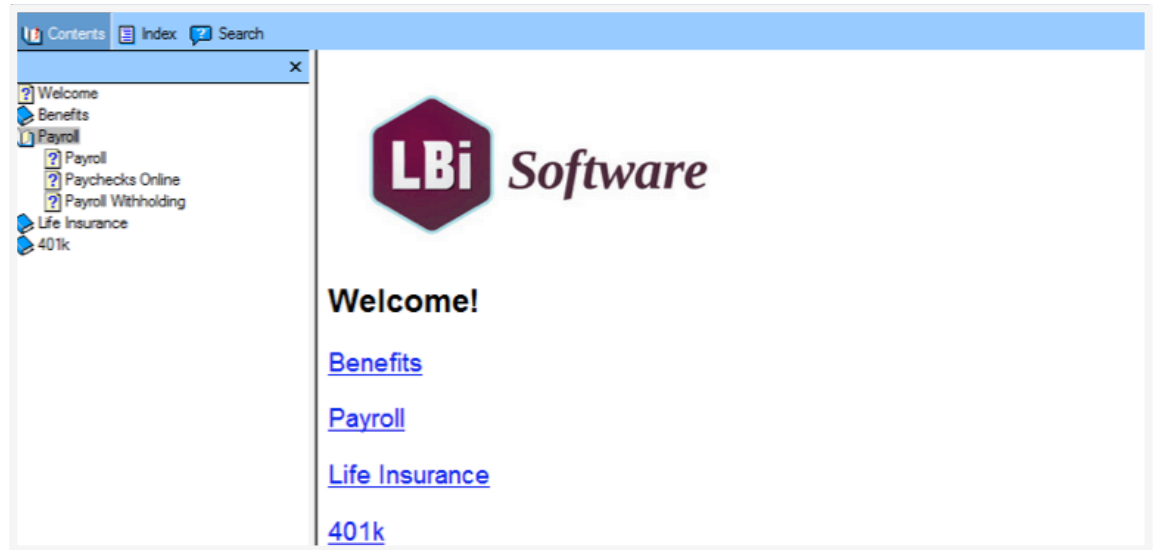
CC Emails:

Escalate To: Manager

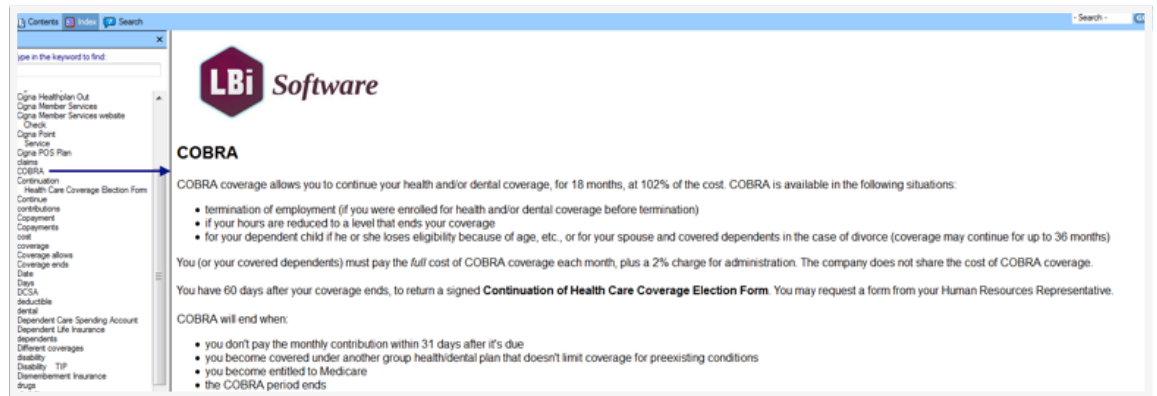
Common Problem: ☐

Buttons: Send, Quick Answer, Add Attachments, Cancel

» Contents



» Index



» Search

The screenshot shows a web browser window with the LBI Software logo at the top. A search bar in the top left corner contains the word 'retirement'. Below the search bar, a table of search results is displayed. The results are ranked 1 through 4. The first result is 'Long-Term Disability', the second is 'K12(b) Deductions', the third is 'Dependent Care Spending Account', and the fourth is 'Health Care Spending Account'. A blue arrow points from the search bar to the 'Health Care Spending Account' result. The 'Health Care Spending Account' page is displayed on the right side of the browser window. It features a list of bullet points and a yellow 'TIP!' box.

Search Results:

Rank	Title
1	Long-Term Disability Long-Term Disability There are two options available under the LTD Plan...
2	K12(b) Deductions K12(b) Deductions You can deduct the amount of money that you contribute from your tax...
3	Dependent Care Spending Account Dependent Care Spending Account The money can only be used to pay for...
4	Health Care Spending Account Health Care Spending Account You contribute \$300...

Health Care Spending Account

- You contribute \$300 to \$3000 of your pay to the account each year.
- The money can be used to pay your eligible health care expenses as well as your dependents'.
- You save money because the contributions are made on a before-tax basis. They are subtracted from your pay before federal income taxes and Social Security taxes are taken out.
- You cannot change your elections during the year.
- You must submit a claim form to receive reimbursement and each claim must be at least \$50 (except for your last claim of the year, which can be for any amount).
- You have until March 31 to submit claims for the prior year.
- Once you retire, you may no longer make contributions to the account, and any amount left in your account when you retire can only be used to reimburse expenses incurred before your retirement date.

TIP: Unused money in your account at the end of the year is forfeited, although you can submit claims until March 31 of the next year. Make sure you estimate your expenses carefully.

Regardless of which version of LBi HR HelpDesk you are using, it's crucial to know how to use the powerful features designed to give employees and HR easy access to a range of information, including frequently asked questions and their resolutions; company documents and forms; and organization policies and procedures. These are among the first steps toward challenging yourself and your organization to transform HR. [Download a brochure](#) or visit the [LBi HR HelpDesk page](#) of our website for complete details, including the features of each version of LBi HR HelpDesk, pricing after the trial periods end, and a guide to determine which option is right for any SMB user.
