LBi Software

LBi HR HelpDesk:
Uniquely Designed to Serve HR

LBi HR HelpDesk is an Innovative Case Manager and Call-tracking Workflow Solution

Innovative Case Management and Workflow

✔ **Multiple means for privacy and confidentiality**

- Case visibility can be designated in one of three ways: Normal, Protected, or Confidential

- 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 email to their personal email address or in a hard-copy letter sent 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, 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

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, or database integration, or import the employees yourself

Links with employee records in other systems

- Efficiently and securely link with employee records in Workday, Oracle HCM Cloud, PeopleSoft, ADP, talent management systems, and more

100% Java, totally mobile

- Runs in all major internet browsers, plus on Apple iPhones/iPads, Androids, etc.

- Requires no plug-ins (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 a full view of all case details and all related employee information

Amazon VPC hosting

- VPC hosting rolled into Version 7 pricing

- Your app and data are hosted privately

- If your data is sensitive, it deserves private hosting

Other hosting options are available. We also offer Rackspace dedicated server hosting. Benefits include:

- Expertise – Rackspace is a leader, three years running, in the Gartner Magic Quadrant

- Hosting facilities across the United States, in the United Kingdom, and in Asia

- Single-tenant servers managed and secured by experts

- SAS 70 Type II and SSAE 16 certified

- ISO 27001 certified

- Support for HIPAA, SOX, and European Safe Harbor policies

- Client-specific hardware and your own server

HR-focused data security

- Single Sign-on (SSO)

- Two-factor authentication

- Data encryption at rest

- Password encryption

- 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
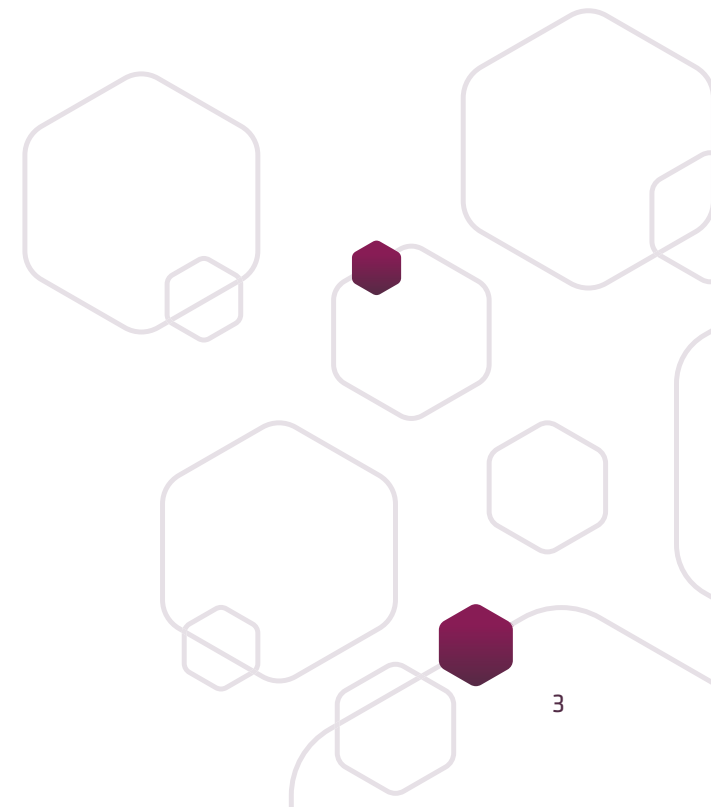
The Knowledge Base – Integrated and Sophisticated

✔ **Two searchable knowledge bases**

- Common Problems Knowledge Base – Your repository of frequently asked questions. Import your existing FAQ database or create and continually 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 is 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 HelpDesk 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 Logins
- 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 easily for ad hoc reporting by nontechnical users**

✔ **Leverage the Executive Dashboard for comprehensive analytics**

- Customizable widgets and multiple chart graphic options
- One-click access to underlying data
- Improved features in LBi HelpDesk Version 7.0

Pricing: *Pricing is as low as $1,500/ month for up to 10 named HR users and unlimited employee self-service usage. Includes full HR HelpDesk application, all third-party licensing, and hosting on Amazon Web Services EC2 RDS.*

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.

LBi Software is headquartered in Melville, N.Y., and is online at LBiSoftware.com.

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