LBi HR HelpDesk:

IMPORTING EMPLOYEE DATA

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Importing Employee Data: LBi HR HelpDesk Product Guide

Regardless of the size of their company, employees are demanding more than ever from HR. One big thing they want is Internet-based, consumer-like one-stop shopping for information and answers related to all facets of their benefits and compensation.

LBi HR HelpDesk offers that, thanks in part to our seamless integration of the leading HR packages, giving HR staff members and call service representatives a holistic view of employee information.

However, you need to do two things before you can begin using LBi HR HelpDesk:

1. **Perform Initial Setup –** See the **Initial Setup Product Guide** for step-by-step details on how to set up your unique HR HelpDesk system.

2. **Import Your Employees –** This Product Guide will walk you through this process.

It all starts with accurately and efficiently importing existing employee data. This guide will lead you step by step through the data-importing process to start giving employees accurate, timely, and consistent answers and to save HR time.

LBi HR HelpDesk provides two options for entering employees into the system:

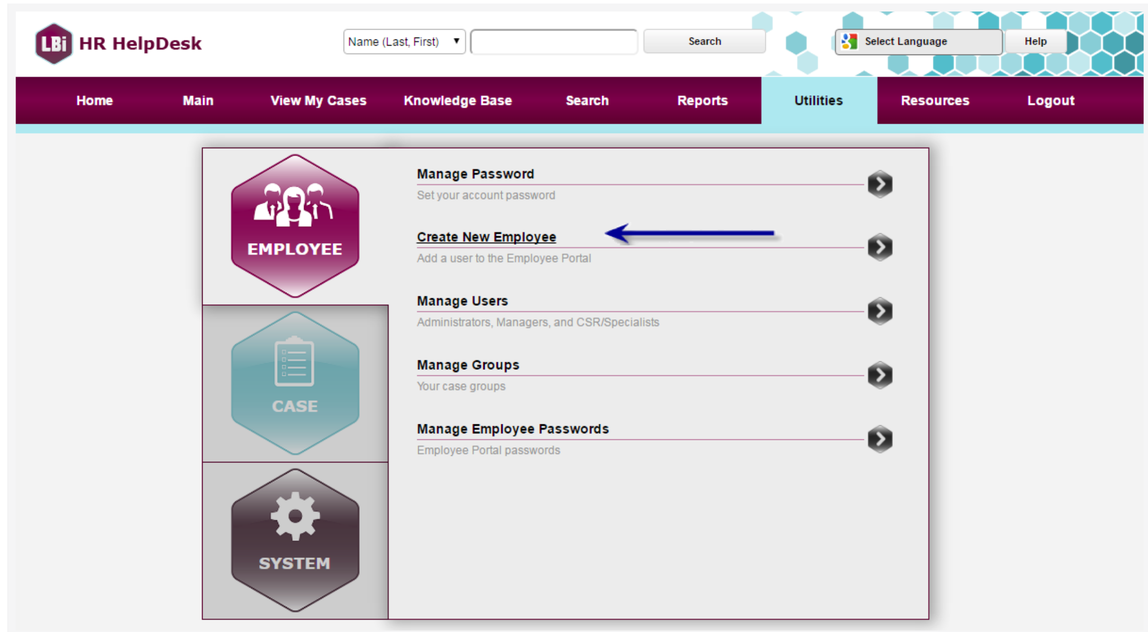
- Manually entering employees using the Create New Employee Utility
- Importing employees from an Excel spreadsheet with the Import Employees Utility

This Product Guide offers step-by-step instructions for both options, so you can easily load your employee information and immediately begin to accurately track their cases. This guide explains how to use the:

- Create New Employee Utility
- Import Employees Utility

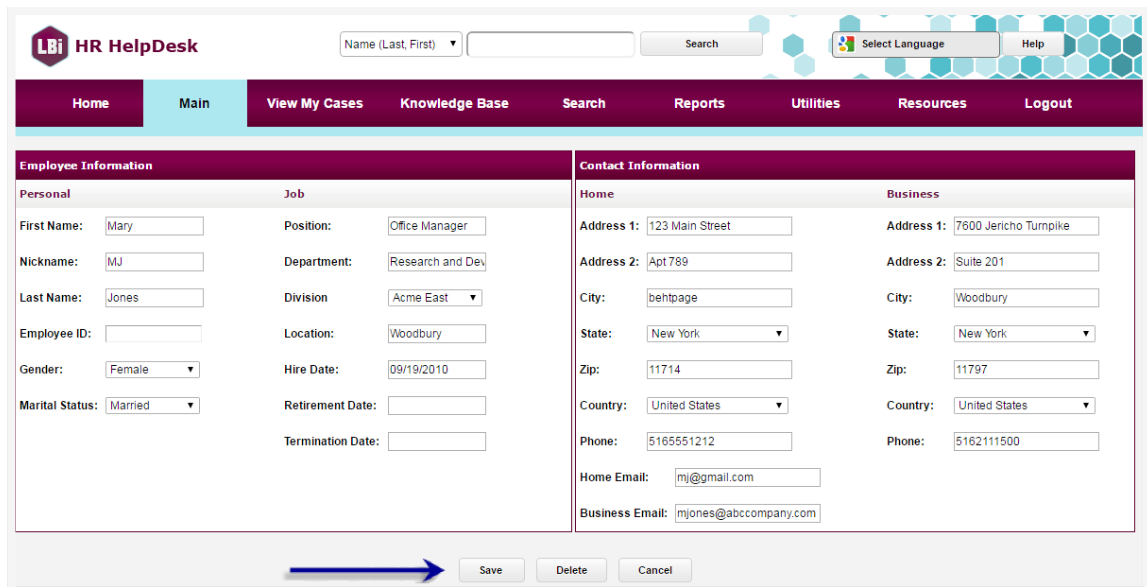
A. Create New Employee Utility

1. From the Utilities menu Employee tab, select "Create New Employee."



2. Enter the information in the applicable fields.

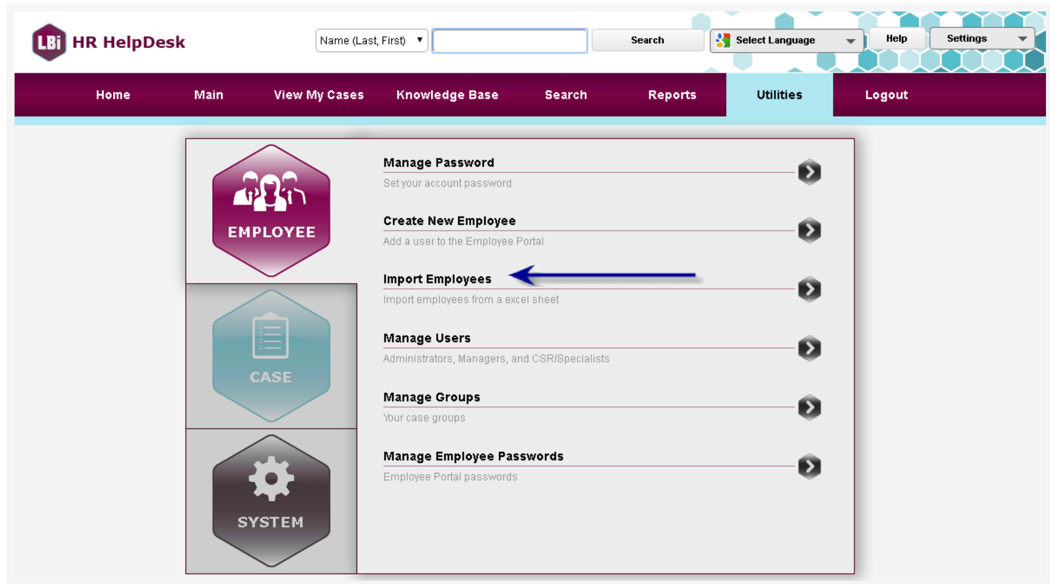
3. Click "Save."



B. Import Employees Utility

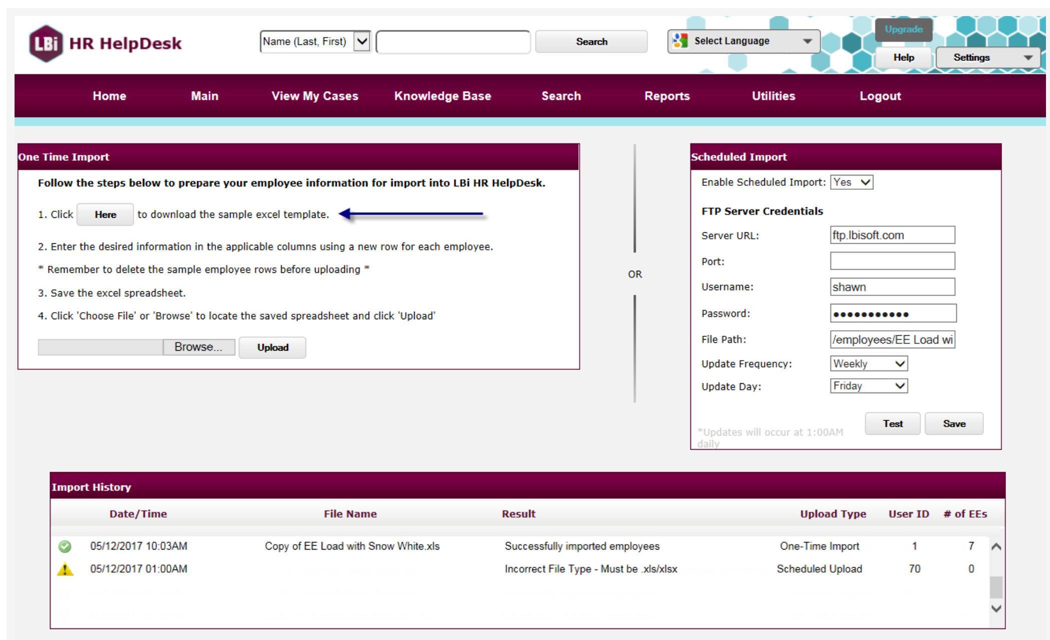
Stage 1: Preparing Employee Information for Import

1. From the Utilities menu Employee tab, select “Import Employees.”



2. Download the Sample Template to use for the entry of employee information.

   Note: If you prefer, you can create your own Excel spreadsheet or use an exported Excel file from your HR system. However, be sure to include columns for the required fields listed in the next step.



3. Enter the information in the desired columns using the exact formats explained in this step.

   Required Fields – The minimum required fields include:

   - First Name
   - Last Name
   - Employee ID (see the note on the next page)
   - Division (see the note on the next page)
   - Email Address (see the note on the next page)

A Note About the Employee ID
This must be a unique identifier for each employee. It can be an ID you already have in your HR system or one assigned specifically for LBi HR HelpDesk.

A Note About Divisions
Divisions should be set up in LBi HR HelpDesk before you import employees. The value entered in the template must be an exact match to the **Division Name** set up in that field of the **Manage Division/Category/Subcategory Utility**. Otherwise, the correct Division will not be applied to the employee's record. Divisions entered on the spreadsheet that are not an exact match or do not exist in the system will be set to **"Other"** in the Employee Profile during the import process.

- Use a new row for each employee record.
- Delete the sample employee row before uploading.

A Note About the Email Address
This should be the employee's unique email address; do not use group emails. The employee will use this email address to log in to HR HelpDesk and to receive notifications from the system.

4. Save the Excel spreadsheet.

Sample Template

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Last Name	Nickname	SSN	Gender	Marital Status	Employee ID	Home address 1	Home Address 2	Home City	Home State	Home Zip	Home Country
2	Janice	Roberts	Jan	111-33-4444	Female	Single	101	123 My Way	Apt 5B	Woodbury	NY	11797	USA
3	John	Smith	Johnny	222-44-5555	Male	Married	102	1553 Sandy Lane		Bethpage	NY	11714	USA
4	Mary	Thompson		333-56-7777	Female	Single	103	988 Burke Street		Smithtown	NY	11787	USA
5													

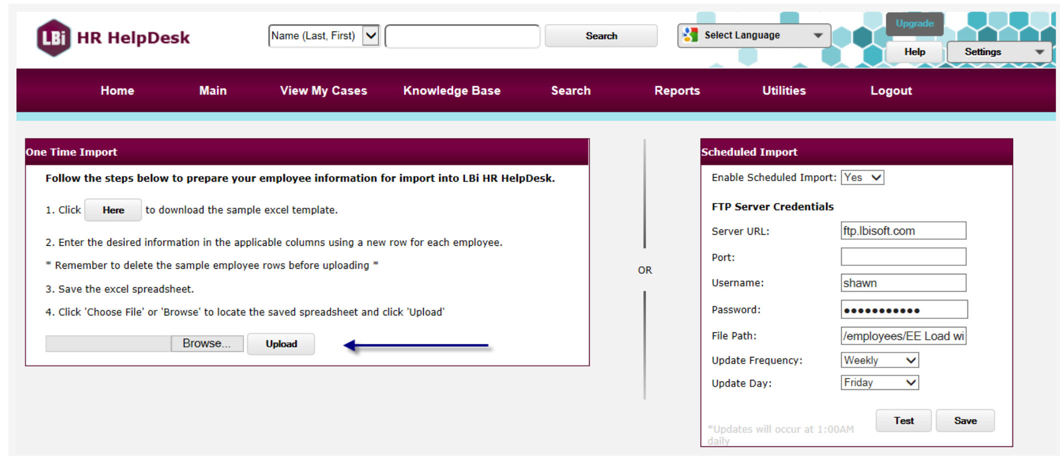
	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Home Phone	Home Cell	Home Email	Location	Business Address 1	Business Address 2	Business City	Business Country	Business State	Business Zip	Business Phone	Business Cell
2	5165551212	5167771212	jan@gmail.com		1 Corporate Drive	Suite 400	Woodbury	USA	NY	11797	800555100	
3	5165551313	5167771212	johnny@aol.com		1 Corporate Drive	Suite 400	Woodbury	USA	NY	11797	800555100	
4	6315551414	6317771212	mary@gmail.com		1 Corporate Drive	Suite 400	Woodbury	USA	NY	11797	800555100	
5												

	Z	AA	AB	AC	AD	AE	AF	AG
1	Business Email	Position	Department	Division	Hire Date	Termination Date	Retirement Date	Birth Date
2	jroberts@company.com	Analyst	Finance	Corporate	1/19/2011			7/15/1975
3	jsmith@company.com	Accountant	Finance	Corporate	5/12/2009			9/19/1977
4	mthompson@company.com	Manager	Sales	West	3/5/2008			1/25/1980
5								

Stage 2: Importing Employee Information

1. From the Utilities menu Employee tab, select “Import Employees.”

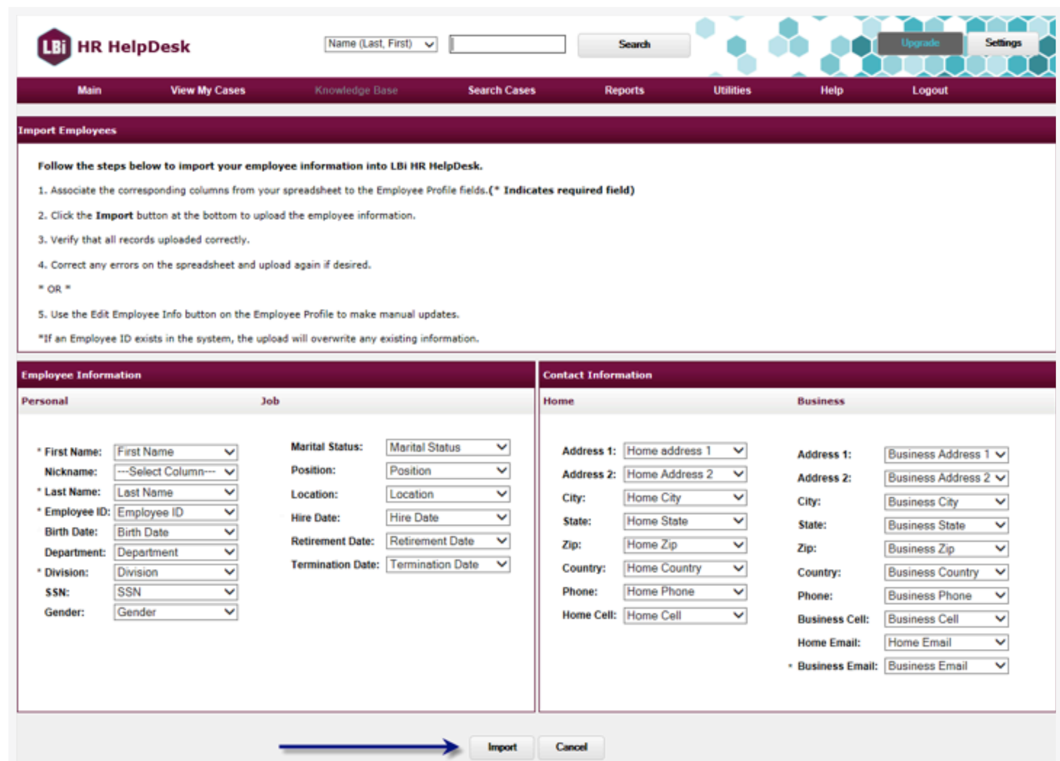
2. Click “Choose File” or “Browse” to locate the saved spreadsheet; click “Upload.”



3. Match the selected column names from your spreadsheet to the corresponding field name that is displayed in the Employee Profile section of LBi HR HelpDesk. Required Fields are indicated with an asterisk (*).

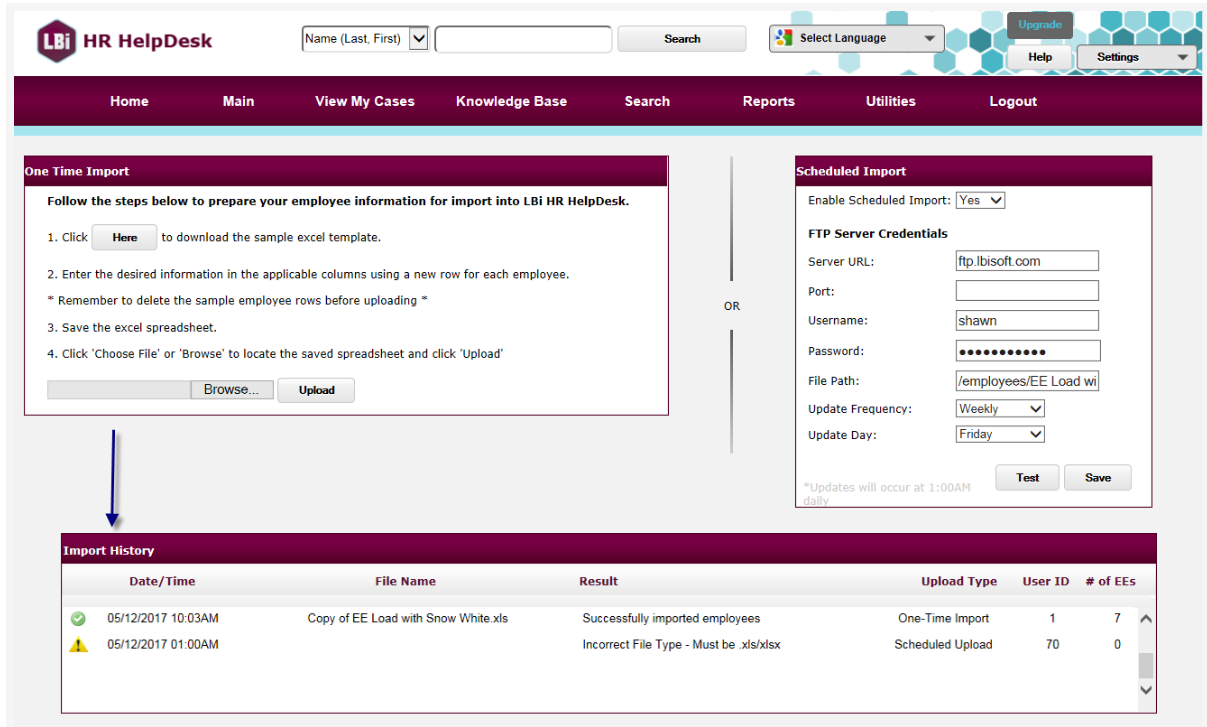
   Note: This step is only offered while doing a manual import. It is not available for scheduled imports.

   Click “Import” to upload the employee information from your spreadsheet.



4. Verify that all records uploaded correctly.

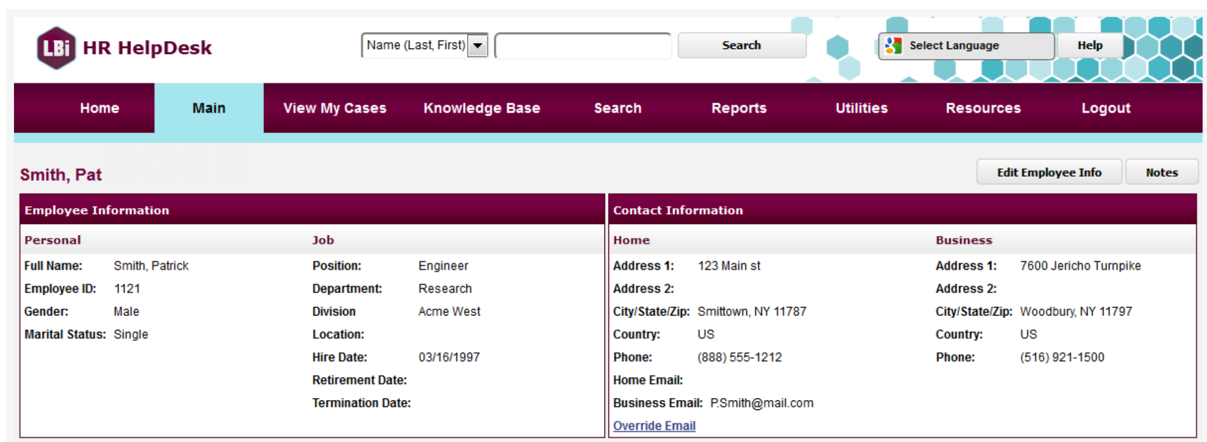
- The Import History section will display a record of all uploads with the results, the user who performed it and the number of employees.
- On the main screen, use the top search bar to locate each employee.
- Review the information displayed in the Employee Profile fields for accuracy.



5. Correct any errors, using one of two methods:

- Manually correct (or update) fields using the Edit Employee Info button above the Employee Profile section on the Main screen.
- Correct (or update) the spreadsheet and repeat the import process.

Note: Uploading a spreadsheet will overwrite any existing profile information for employees already in the system with the same Employee ID. Case details and history will remain unchanged.



Stage 3: Scheduling Employee Imports

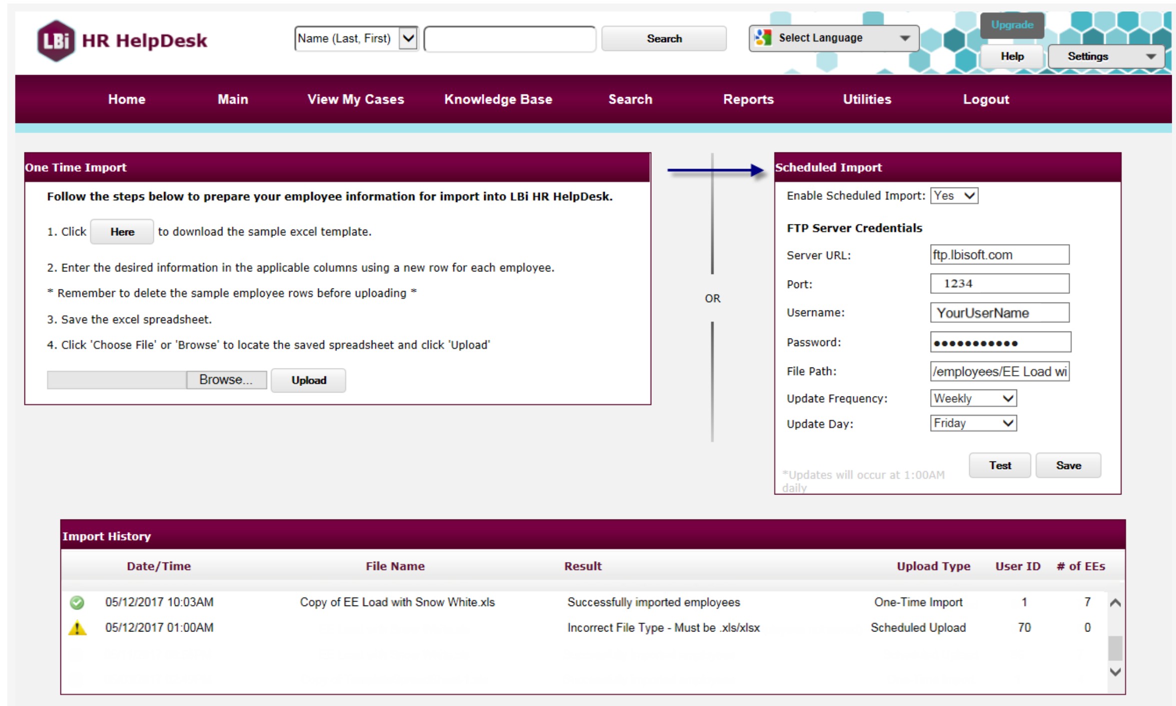
1. From the Utilities menu Employee tab, select "Import Employees."

2. Enter the required information
   - Choose *Yes* from the dropdown to enable a scheduled import.
   - Enter the FTP Server Credentials.
   - Select *Daily* or *Weekly* Frequency and Update Day from the dropdowns.

3. Click "Test" to have the system attempt to connect to the ftp server and access the file. A record will be added to the Upload History displaying whether or not the test was successful.

4. Click "Save" to save the schedule.

5. Verify that the file imported correctly in the Upload History section.



Regardless of which version of LBi HR HelpDesk you are using, importing data accurately is crucial. It's the first step 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.