
LBi HR HelpDesk: **INITIAL SETUP GUIDE**



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Initial Setup: LBi HR HelpDesk Product Guide

LBi HR HelpDesk offers a variety of customizable options to meet your business needs for case tracking, assignment, reporting, and creating a powerful resource for information, policies, and documents.

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

1. **Conduct Initial Setup** – Create your categories, subcategories, users, groups, and distribution rules. This Product Guide will walk you through those settings.
2. **Import Your Employees** – You do this after initial setup. See the [Importing Employees Product Guide](#) for step-by-step details.

This Product Guide provides step-by-step instructions for setting up your unique LBi HR HelpDesk system. This guide explains how to:

- A. Set up the system **Hierarchy** and **Categories** (you'll need at least one value for each)
 - Divisions
 - Categories
 - Subcategories
- B. Create and manage LBi HR HelpDesk users
- C. Set up users into groups (optional)
- D. Create case distribution using associated users or groups
- E. Establish your **Administrator Utility** settings

A. Companies/Categories/Subcategories

The hierarchy within LBi HR HelpDesk is *Company, Category and Subcategory* and the layout of these levels drives several functions throughout the system. Cases are categorized using a combination of these three levels. Based on the values selected, cases can be distributed and assigned to specified users or groups. Aging values and default priority options are based on *Companies/Categories/Subcategories*. The option to prevent certain *Companies/Categories/Subcategories* from being used in the Employee Portal is available. The Knowledge Base of commonly asked questions, issues and resolutions is set up based on *Company/Category/Subcategory*. Reporting is generated based on *Company, Category and Subcategory*.

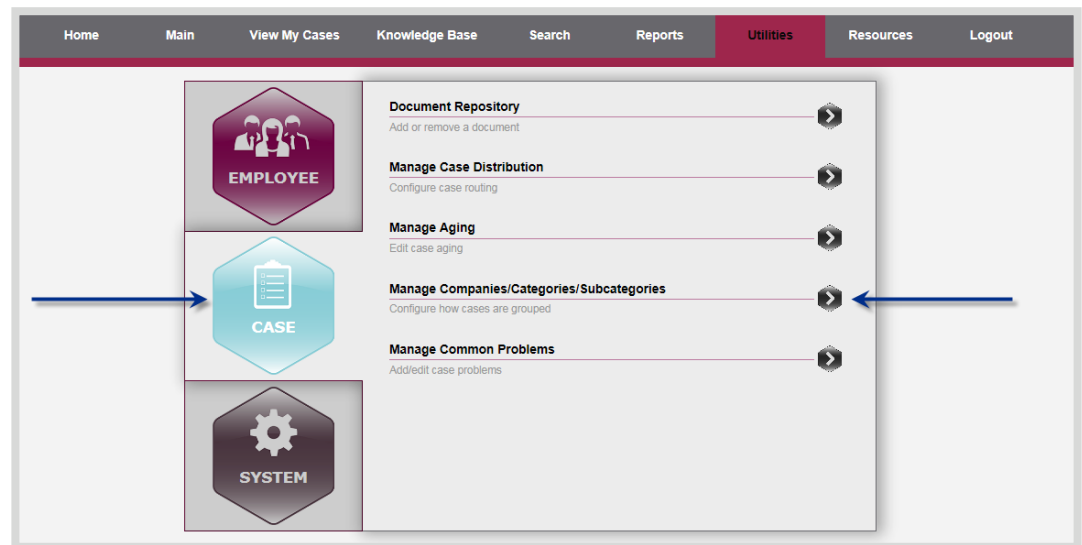
Once you have determined the best options for your business needs, taking the above factors into consideration, the setup is simple.

- A new **Company** is created by entering a full name and an abbreviation.
- **Categories** are then created for each company by entering a full name, abbreviation and indicating if the category will be available for usage in the Employee Portal.
- **Subcategories** are then added for each Category by entering a name, indicating if it will be available for usage in the Employee Portal, the aging value to determine when it is flagged as “overdue” and the default priority value.

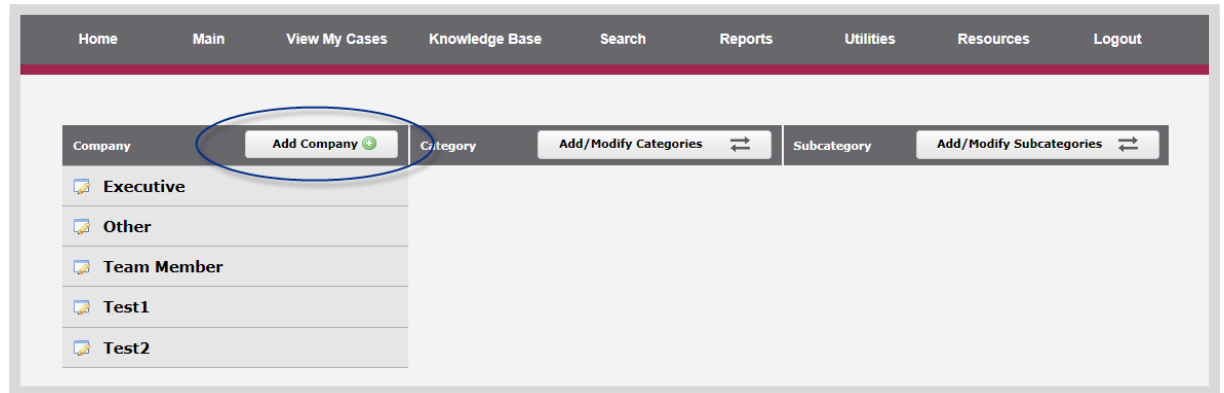
The process can be streamlined and setup effort significantly reduced if there are categories and subcategories that are the same or similar across companies. Once created, existing categories and subcategories can easily be applied and adjustments made as needed, or if applicable, new values can be created.

Adding New Companies/ Categories/ Subcategories

1. Select Manage Companies/Categories/ Subcategories from the Case section of the Utilities menu.



2. Click the Add Company (+) button to create a new Company.

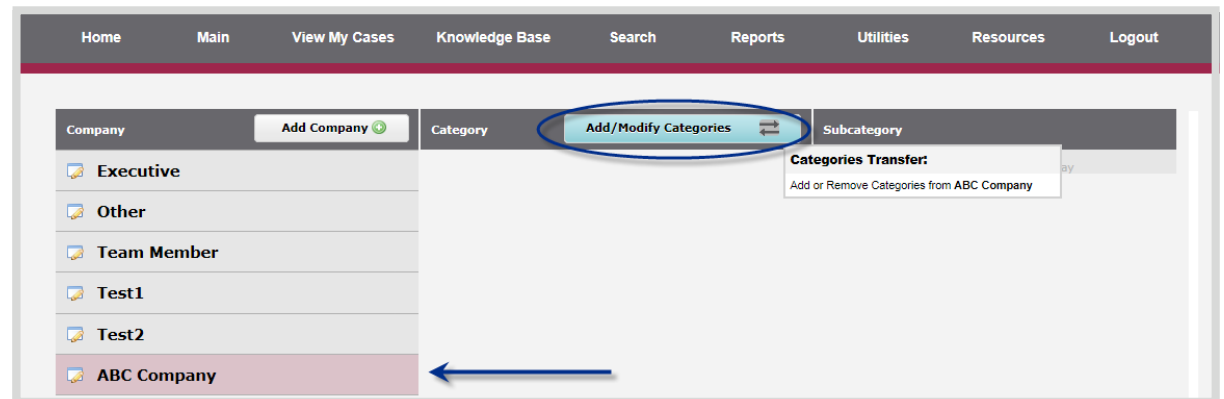


3. Enter a Name and Abbreviation for the Company. The Name will be displayed throughout the application.

The 'Create a New Company' dialog box is shown. It has a title bar that says 'Create a New Company'. Below the title bar, there are two input fields: 'Name:' with the value 'ABC Company' and 'Abbreviation:' with the value 'ABC'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

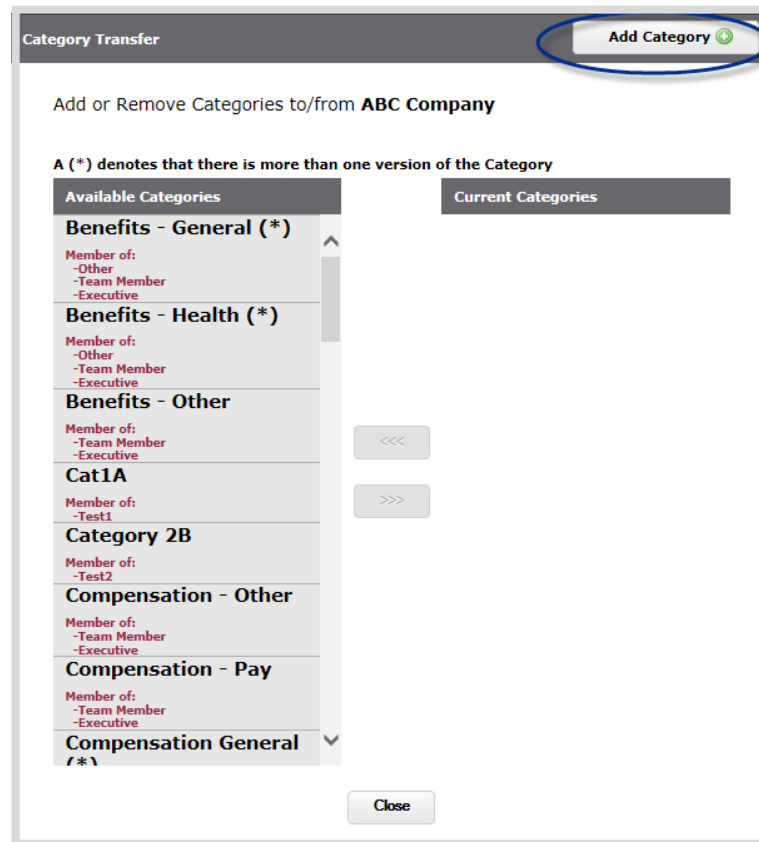
4. Click the "OK" button

5. Verify that the Company was added to the list. With the Company selected, click the Add/Modify Categories button. The Category section will be displayed.



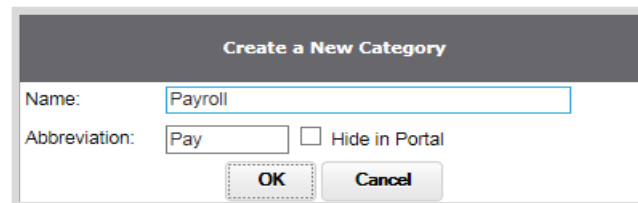
- Click the Add Category button to enter a new category.

Adding and removing existing categories is covered in the Manage Divisions, Categories and Subcategories Guide.



The 'Category Transfer' dialog box is titled 'Add or Remove Categories to/from ABC Company'. It features an 'Add Category' button with a green plus icon in the top right corner. Below the title, a note states: 'A (*) denotes that there is more than one version of the Category'. The dialog is divided into two main sections: 'Available Categories' on the left and 'Current Categories' on the right. The 'Available Categories' list includes: 'Benefits - General (*)' (with sub-items: Member of: -Other, -Team Member, -Executive), 'Benefits - Health (*)' (with sub-items: Member of: -Other, -Team Member, -Executive), 'Benefits - Other' (with sub-items: Member of: -Team Member, -Executive), 'Cat1A' (with sub-item: Member of: -Test1), 'Category 2B' (with sub-item: Member of: -Test2), 'Compensation - Other' (with sub-items: Member of: -Team Member, -Executive), 'Compensation - Pay' (with sub-items: Member of: -Team Member, -Executive), and 'Compensation General (*)'. Between the two lists are '<<<' and '>>>' buttons. A 'Close' button is located at the bottom right.

- Enter a Name and Abbreviation for the Category.
- Select the Hide in Portal checkbox if this category should not be available for usage by employees in the Employee Portal.
- Click OK



The 'Create a New Category' dialog box contains two input fields: 'Name:' with the value 'Payroll' and 'Abbreviation:' with the value 'Pay'. To the right of the 'Abbreviation' field is a checkbox labeled 'Hide in Portal'. At the bottom are 'OK' and 'Cancel' buttons.

10. New categories will be displayed under the Current Categories column. Repeat steps 5-8 above to create additional new categories.

Multiple categories may be added for a selected company.

11. Click the Close button.

The 'Category Transfer' dialog box is titled 'Add or Remove Categories to/from ABC Company'. It features an 'Add Category' button with a green plus icon in the top right corner. Below the title bar, a note states: 'A (*) denotes that there is more than one version of the Category'. The dialog is divided into two main columns: 'Available Categories' on the left and 'Current Categories' on the right. The 'Available Categories' list includes: 'Benefits - General (*)', 'Benefits - Health (*)', 'Benefits - Other', 'Cat1A', 'Category 2B', 'Compensation - Other', 'Compensation - Pay', and 'Compensation General (*)'. Each category has a 'Member of:' field with options like '-Other', '-Team Member', and '-Executive'. The 'Current Categories' column currently contains 'Payroll', which is highlighted with a blue arrow. Between the columns are '<<<' and '>>>' buttons. A 'Close' button is located at the bottom center.

12. Verify that the Category was added to the list. With the Company and Category selected, click the Add/Modify Subcategories button. The Subcategory section will be displayed.

The screenshot shows the main application interface with a top navigation bar containing links: Home, Main, View My Cases, Knowledge Base, Search, Reports, Utilities, Resources, and Logout. Below the navigation bar is a table with three columns: 'Company', 'Category', and 'Subcategory'. The 'Company' column lists 'Executive', 'Other', 'Team Member', 'Test1', 'Test2', and 'ABC Company'. The 'Category' column lists 'Payroll'. The 'Subcategory' column is currently empty. A blue arrow points to the 'ABC Company' row, and another blue arrow points to the 'Payroll' category. A third blue arrow points to the 'Add/Modify Subcategories' button, which is circled in red. To the right of the table, a 'Subcategories Transfer' dialog box is visible, titled 'Add or Remove Subcategories from Payroll'.

- Click the Add Subcategory button to enter a new subcategory.

Adding and removing existing subcategories is covered in the Manage Divisions, Categories and Subcategories Guide.

- Enter a Name for the Subcategory.
- Select the Aging Value which determines how much time must pass before the case is flagged as "overdue".

Aging Units (Days or Hours) is set in the Manage Aging Utility.

- Set the Default Priority (Normal, High, Urgent).
- Click OK.

The screenshot shows a dialog box titled "Subcategory Transfer". In the top right corner, there is a button labeled "Add Subcategory" with a green plus icon, which is circled in blue. Below the title bar, the text "Add or Remove Subcategories to/from Payroll" is displayed. A note states: "A (*) denotes that there is more than one version of the Subcategory". The dialog is divided into two main sections: "Available Subcategories" on the left and "Current Subcategories" on the right. The "Available Subcategories" list includes items like "90-Day Evaluation", "AFLAC", "Add Beneficiary", "Add Dependent", "Address Change", "Adoption", "Affordable Care Act", "Application Status", and "Biometric Screening", each with a "Member of:" field. Between the two lists are navigation buttons: "<<<", ">>>", and "Close".

The screenshot shows a dialog box titled "Create a New Subcategory". It contains three input fields: "Name:" with the value "Paychecks", "Aging Value:" with the value "5", and "Default Priority:" with a dropdown menu set to "High". Below these fields is a checkbox labeled "Hide in Portal" which is currently unchecked. At the bottom of the dialog are two buttons: "OK" and "Cancel".

18. Select an option to determine where the subcategory will be added.

- All “XXX” Categories
Adds the subcategory to all versions of this category across all companies.
- All “XXX” Categories of this type
Adds subcategory to only the same versions of this category across all companies.
- Only this Category
Adds subcategory to only this specific category within this specific company.

NOTE: “Versions” refer to those categories with the same name but different details.

19. Click OK

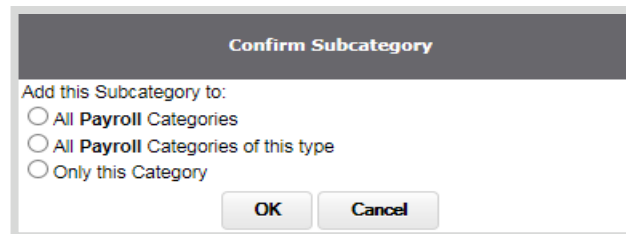
20. New subcategories will be displayed under the Current Subcategories column. Repeat steps 5-8 above to create additional new subcategories.

Multiple subcategories may be added for a category.

21. Click the Close button.

IMPORTANT NOTE:

Each level must have at least one associated value for it to be saved successfully. A Company requires at least one Category. A Category requires at least one Subcategory.

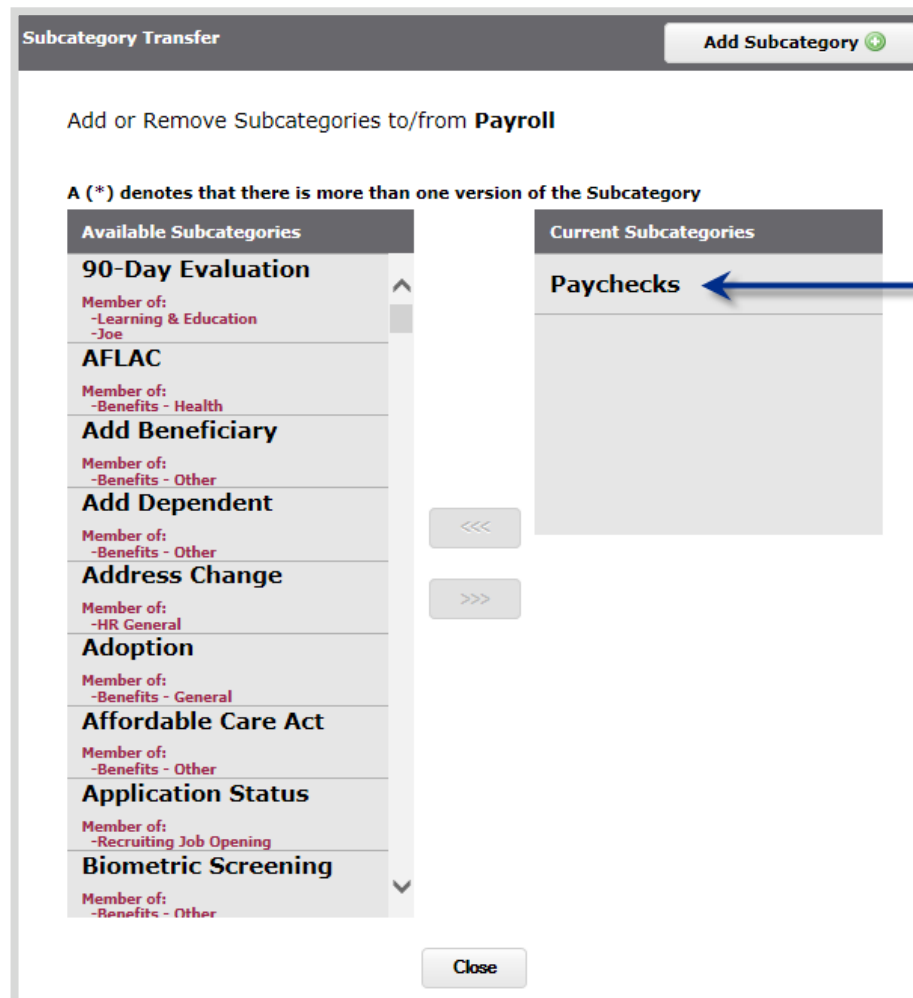


Confirm Subcategory

Add this Subcategory to:

- ☐ All Payroll Categories
- ☐ All Payroll Categories of this type
- ☐ Only this Category

OK Cancel



Subcategory Transfer Add Subcategory +

Add or Remove Subcategories to/from Payroll

A (*) denotes that there is more than one version of the Subcategory

Available Subcategories	Current Subcategories
90-Day Evaluation Member of: -Learning & Education -Joe	Paychecks
AFLAC Member of: -Benefits - Health	
Add Beneficiary Member of: -Benefits - Other	
Add Dependent Member of: -Benefits - Other	
Address Change Member of: -HR General	
Adoption Member of: -Benefits - General	
Affordable Care Act Member of: -Benefits - Other	
Application Status Member of: -Recruiting Job Opening	
Biometric Screening Member of: -Benefits - Other	

<<< >>>

Close

B. Manage Users

The **Manage Users** utility allows Administrators to set up user access to the LBi HR HelpDesk system. Access to the **Manager Dashboard** is granted in this utility.

The choice of three User Types provides different levels of access and functionality:

1. Administrators

Administrator designation allows access to all cases, utilities, and functions in the application. Only Administrators can:

- Create New Employees, Users, and Groups
- Manage Divisions, Categories, Subcategories, and Case Distribution
- Manage Aging, Common Problems, and the Document Repository
- Manage Employee Survey and Administrator Utility settings
- Reopen, reassign, and update closed cases
- Delete cases
- Mark saved reports as “Standard”

2. Managers

Users designated as Managers are allowed to view and update Pending cases of users who report to them. Managers can also:

- Set case Visibility and Priority
- Reassign case ownership to a Group or to users whom they manage

3. CSRs (Customer Service Representatives)

CSRs have access to **view and update Pending cases** that they own. They can also reassign case ownership to a Group.

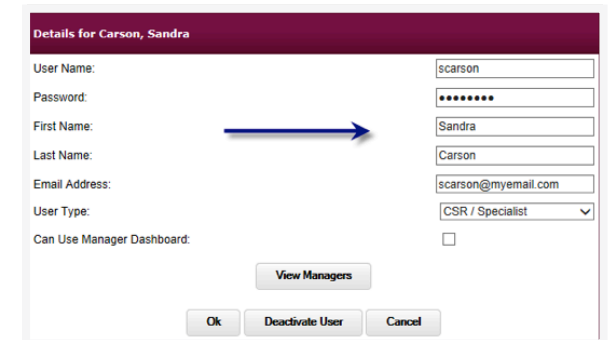
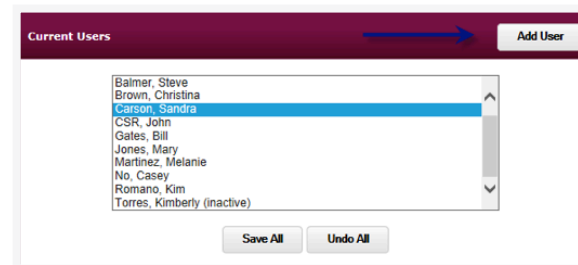
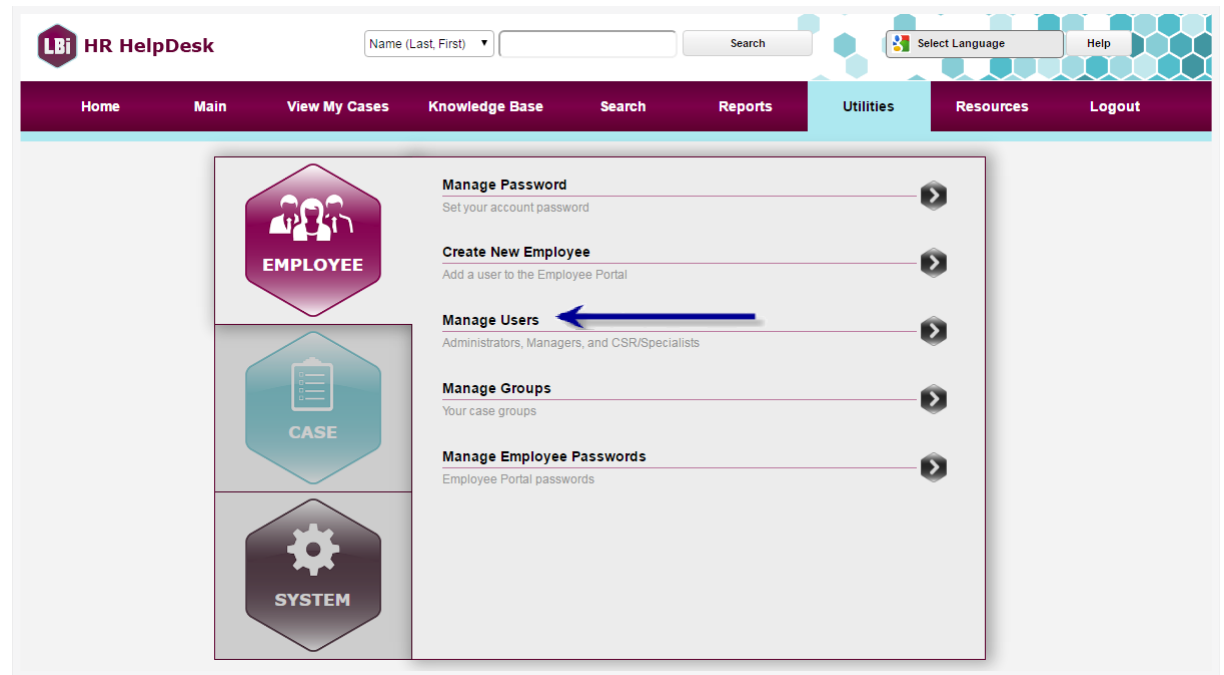
The “Visibility” setting of a case also determines view and update capability:

- **Normal** – Any user can view and update.
- **Protected** – Any user can view, but only an Authorized User* can update.
- **Confidential** – Only an Authorized User* can view and update.
- **Groups** – Only an Authorized User*, CSRs within the Group, and the managers of those CSRs can view and update.

* The Case Owner, the Case Owner’s Manager, or an Administrator

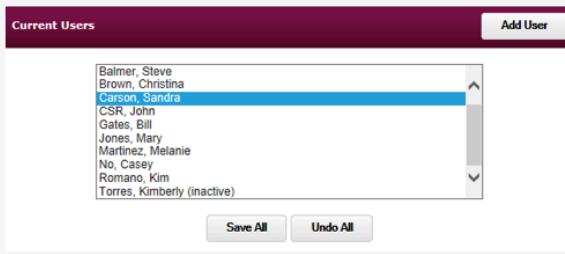
Adding Users

1. From the Utilities menu Employee tab, select Manage Users.
2. Click "Add User."
3. Enter the User Name, Password, First and Last Name, and Email Address.
4. Select the User Type.
5. Click the box to select "Can Use Manager Dashboard" (if applicable).
6. Click "OK."
7. Click "Save All."



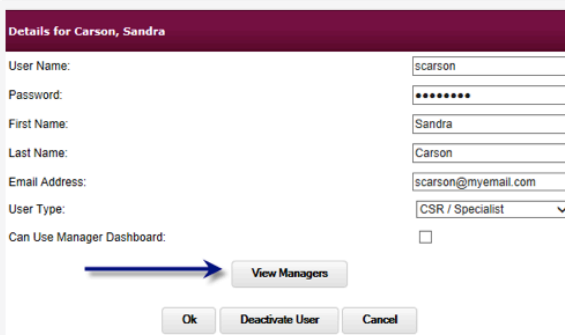
Adding Managers to Users

1. Select the User from the list of Current Users.



The 'Current Users' dialog box has a maroon header with the title 'Current Users' and an 'Add User' button. Below the header is a list box containing the following names: Balmer, Steve; Brown, Christina; Carson, Sandra (highlighted in blue); CSR, John; Gates, Bill; Jones, Mary; Martinez, Melanie; No, Casey; Romano, Kim; and Torres, Kimberly (inactive). At the bottom of the dialog are 'Save All' and 'Undo All' buttons.

2. Click "View Managers."

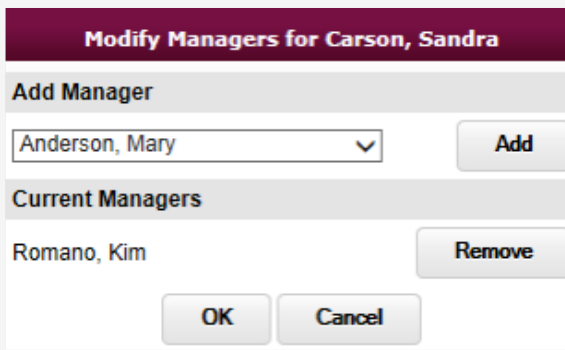


The 'Details for Carson, Sandra' dialog box has a maroon header with the title 'Details for Carson, Sandra'. It contains several input fields: 'User Name:' with 'scarson', 'Password:' with '*****', 'First Name:' with 'Sandra', 'Last Name:' with 'Carson', 'Email Address:' with 'scarson@myemail.com', and 'User Type:' with a dropdown menu set to 'CSR / Specialist'. There is also a checkbox for 'Can Use Manager Dashboard:' which is currently unchecked. A blue arrow points from the text 'Note' to a 'View Managers' button. At the bottom are 'Ok', 'Deactivate User', and 'Cancel' buttons.

3. Select the Manager Name for this user and click "Add."

Note: Only Managers will display in this list, so they should be set up first.

4. Click "OK."



The 'Modify Managers for Carson, Sandra' dialog box has a maroon header with the title 'Modify Managers for Carson, Sandra'. It is divided into two sections. The 'Add Manager' section has a dropdown menu with 'Anderson, Mary' selected and an 'Add' button. The 'Current Managers' section has a list box with 'Romano, Kim' and a 'Remove' button. At the bottom are 'OK' and 'Cancel' buttons.

5. Click "OK" at the bottom of the User Details screen.

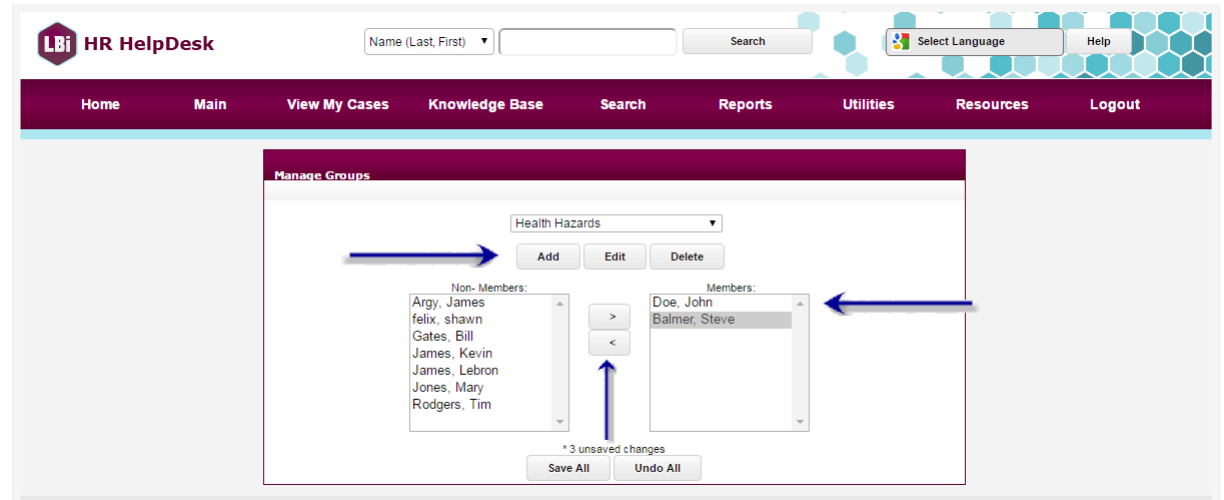
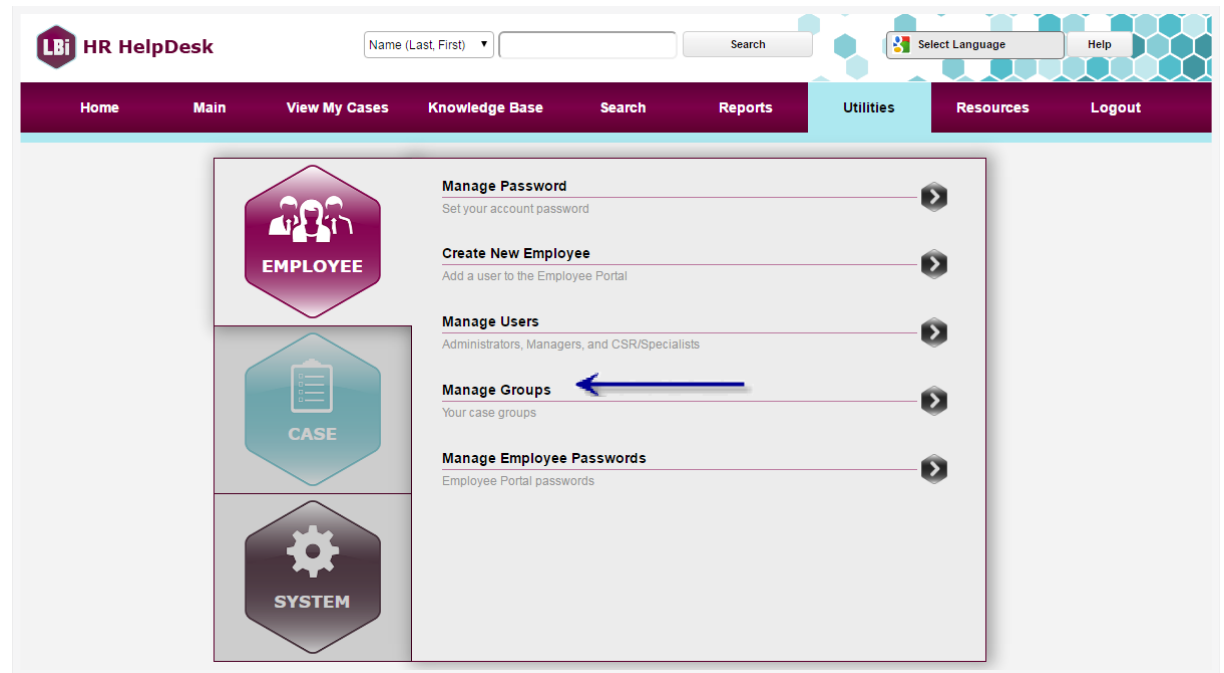
6. Click "Save All."

C. Manage Groups

The Manage Groups utility allows Administrators to create Groups of users. Cases can be assigned to a Group, and any user in the Group can be responsible for the case.

Note: A case for which Visibility has been set to “Group” can only be accessed by CSRs within the Group and by their Managers.

1. Select Manage Groups from the Utilities menu Employee tab.
2. Click “Add.”
3. Enter the Group Name and use the arrows to move Users to the Members list.
4. Click “Save All.”



D. Manage Case Distribution

The **Manage Case Distribution Utility** allows Administrators to **associate Users or a Group to a particular category or subcategory**.

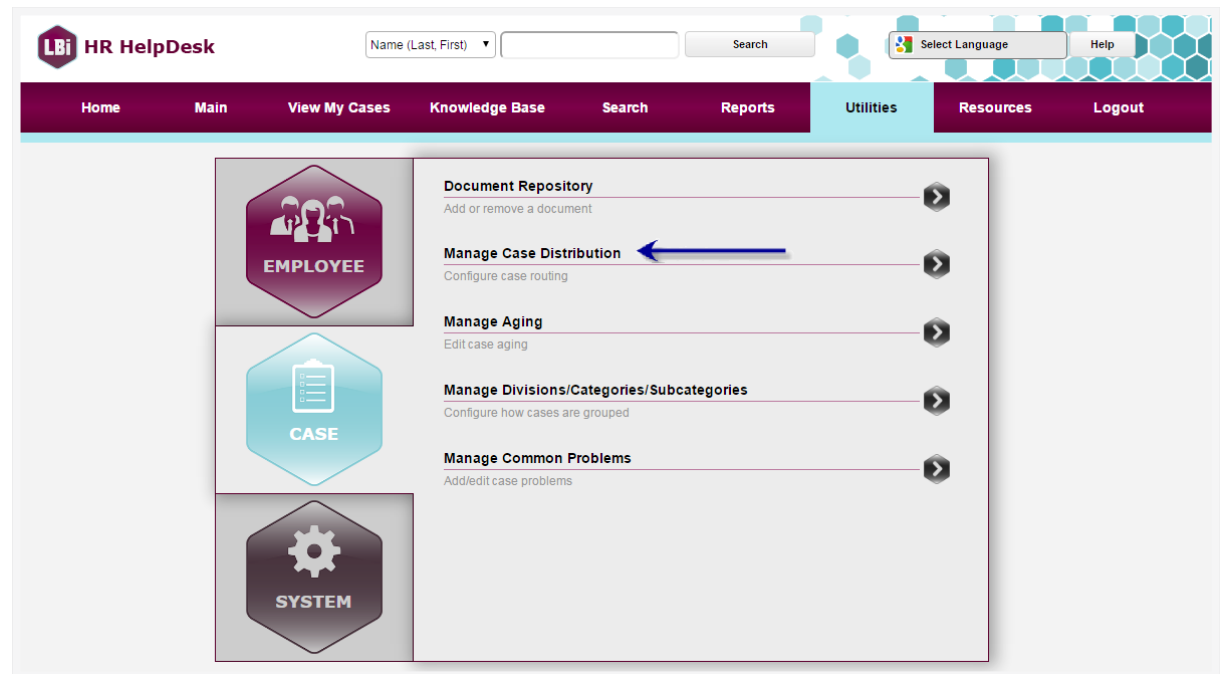
Users or Groups associated with a category or subcategory are eligible to be automatically assigned new cases entered in that category or subcategory. LBi HR HelpDesk's **Auto Assignment Function** will use **Division, Category, and Subcategory** designations to determine which User(s) or Group is best suited to handle a case based on how the Manage Case Distribution utility is configured.

1. From the Utilities menu Case tab, select Manage Case Distribution.

Note: This setup is not required. If a User or Group has not been assigned to a particular Division, Category, or Subcategory combination, the cases will be assigned to the Default User selected in the Administrator Utility. **Refer to the Administrator Utility section of this Product Guide for further details.**

Administrators can also mark users “Out of the Office” and assign an alternate User or Group to replace the out-of-office user for auto-assignment.

Note: Associated Users can be assigned to specific Subcategories within a Category or to “All” Subcategories within a category. However, it is not possible to assign a User to the “All” option if associated Users have been assigned to specific subcategories.



2. Select the desired Division, Category, and Subcategory.

3. Click “Add” and select the Users or Group.

4. Click “Save All.”

The screenshot shows the 'Case Distribution by Division / Category / Subcategory' utility. It features three dropdown menus for 'Division' (Acme West), 'Category' (Payroll), and 'Subcategory' (All). Below these is the 'Associated Users' section with a radio button for '1 Payroll (Group)' and an 'Add' button. The 'Out of Office Users' section contains a table with columns for Name, Start Date, End Date, and Alternate User, currently showing '(None)'. At the bottom are 'Save All' and 'Undo All' buttons. Blue arrows point to the 'Subcategory' dropdown and the 'Add' button.

E. Manage Priority Color-Coding

The Manage Priority Color-Coding Utility allows Administrators to customize case colors to quickly indicate their priority when viewing the Clipboard and Main screens.

1. From the Utilities menu, System tab, select “Manage Priority Color Coding.”

The screenshot shows the 'Manage Priority Color-Coding' utility. On the left is a sidebar with three large hexagonal buttons: 'EMPLOYEE' (with a group of people icon), 'CASE' (with a clipboard icon), and 'SYSTEM' (with a gear icon). The main area displays three settings: 'Manage Priority Color-Coding' (Customize case colors), 'Manage Employee Survey' (Create a new survey), and 'Administrator Utility' (Advanced settings). Each setting has a right-pointing arrow. A blue arrow points to the 'Manage Priority Color-Coding' setting.

2. Select “Yes” to Enable Priority Color-Coding.

3. Click the “colored box” to change the color indicator for a case priority. A color selection box will be displayed.

4. Click the desired color and click “OK”.

5. When the desired colors have been chosen, click the “Save” button.

Case priority colors will be visible on the Clipboard and Main screen to easily identify the severity of each case.

Manage Priority Color-Coding

Enable Priority Color-Coding: Yes

Normal: Current Selection:

Urgent: Current Selection:

High: Current Selection:

Save

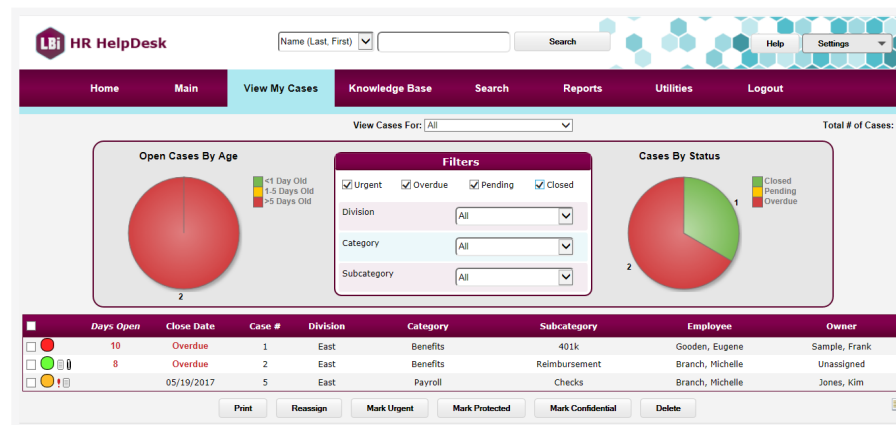
Current Selection:

Current Selection:

Current Selection:

Select a Color

OK



LBI HR HelpDesk

Name (Last, First) Search

Home **Main** View My Cases Knowledge Base Search Reports Utilities Logout

Branch, Michelle Edit Employee Info Notes

Employee Information

Personal	Job
Full Name: Branch, Michelle	Position: Analyst
Employee ID: 103	Department: Corporate
Gender: Female	Division: ACME East
Marital Status: Single	Location: NYC
	Hire Date: 05/10/2017
	Retirement Date:
	Termination Date:

Contact Information

Home	Business
Address 1: 123 Example St.	Address 1:
Address 2:	Address 2:
City/State/Zip: New York, NY 12345	City/State/Zip:
Country: US	Country: US
Phone: (555) 555-5555	Phone:
Home Email:	Business Email: mbranch@example.com
Home Cell:	Business Cell:

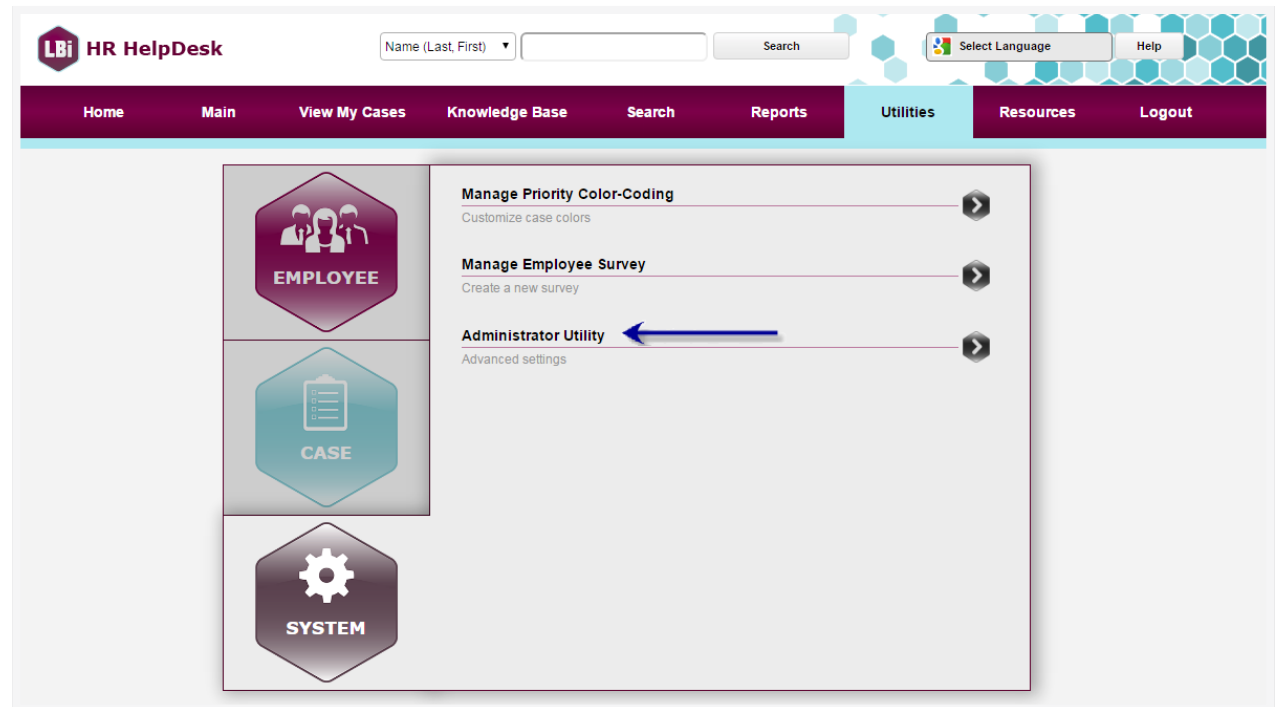
Case History New Case

Case #	Open Date	Close Date	Division	Category	Subcategory	Owner
3	05/08/2017	05/10/2017	ACME East	Payroll	Direct Deposit	Unassigned
4	05/08/2017	05/10/2017	ACME East	Benefits	Commuter Credit	Unassigned
2	05/08/2017	Overdue	ACME East	Benefits	Reimbursement	Unassigned
5	05/06/2017	05/19/2017	ACME East	Payroll	Checks	Jones, Kim

Cases 1 - 4 of 4

F. Administrator Utility Options

The following options are set in the **Administrator Utility**, which is found in the **Utilities** menu.



ADMINISTRATOR UTILITY FEATURE	FUNCTIONALITY
Administrator Email Address	If an email is sent from an address that cannot be found on any employee record within the system, a notification will be sent to the email address entered here.
Default Overdue Age (available in LBi HR HelpDesk ProPlus and Enterprise)	Sets the Aging Value displayed when adding Subcategories. This value determines when a pending case becomes overdue.
Default User (required)	Cases assigned to a Division, Category, or Subcategory that do not have an associated user defined in its Case Distribution will default to this user.
Enable User Interactions (not available in LBi HR HelpDesk Free)	If set to Yes, the Interactions feature will be available in the Case Details.
Division Portal Alert (available in LBi HR HelpDesk ProPlus and Enterprise)	<p>Messages will display on the Employee Portal for employees within the Division (Employee Self-service Portal is not available in LBi HR HelpDesk Free).</p> <p>Note: Messages cannot be seen on the Administrator Utility after they are saved.</p>
Enable Email Notifications	If set to Yes, the Email Notification feature will be available.
New Case Notifications	If set to Yes, a Notification Email will be sent to the employee confirming that a new case was created from an email they submitted or created by an HR user.
Enable Batch Processes	If set to Yes, the process will run to generate Overdue and Follow-up email notifications.
Follow-up Notification Time	Sets the time when Follow-up Notification emails will be sent.
Enable Visibility Property	If set to Yes, the Visibility setting will be available for restricting access to cases.
Email Disclaimer	Displays at the bottom of LBi HR HelpDesk email notifications.
Enable Google Translate	If set to yes, the Google Translate option will be displayed on the top of the HR HelpDesk screen allowing the user to select the language desired. System labels, headings and field names will be translated. System user entered text will not.

Administrator Utility









System Values

Administrator Email Address:	<input type="text" value="kromano@lbisoftware.com"/>
LBI HR HelpDesk URL:	<input type="text" value="http://cm5.lbisoft.com/HRHelpDesk"/>
Employee Portal URL:	<input type="text" value="http://cm5.lbisoft.com/HRHelpDeskEePortal"/>
Default Overdue Age:	<input type="text" value="10"/>
Default User:	<input type="text" value="Unassigned"/>
Enable User Interactions:	<input type="text" value="Yes"/>
Division Portal Alert for:	<input type="text" value="Choose a Division ..."/>

Enable Email Notifications:	<input type="text" value="Yes"/>
New Case Notifications:	<input type="text" value="Yes"/>
Enable Batch Processes:	<input type="text" value="Yes"/>
Enable Visibility Property:	<input type="text" value="Yes"/>
Follow-up Notification Time:	<input type="text" value="15:00"/>
Refresh Cached Lookups:	<input type="button" value="Refresh"/>

Update the email disclaimer on outgoing emails:

Heading 1

B *I* U ABC        

Test Company disclaimer

LBI Software Inc. | 7600 Jericho Turnpike | Woodbury, NY 11797 | [516.921.1500](tel:516.921.1500) | www.LBISoftware.com

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Regardless of which version of LBi HR HelpDesk you are using, it's crucial to know how HR or an employee can enter a new case and what HR needs to know to maintain employee privacy and confidentiality. 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.
