LBi HR HelpDesk:

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

FREE	✓ PRO	✓ PROPLUS	✓ ENTERPRISE

LBi Software

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)

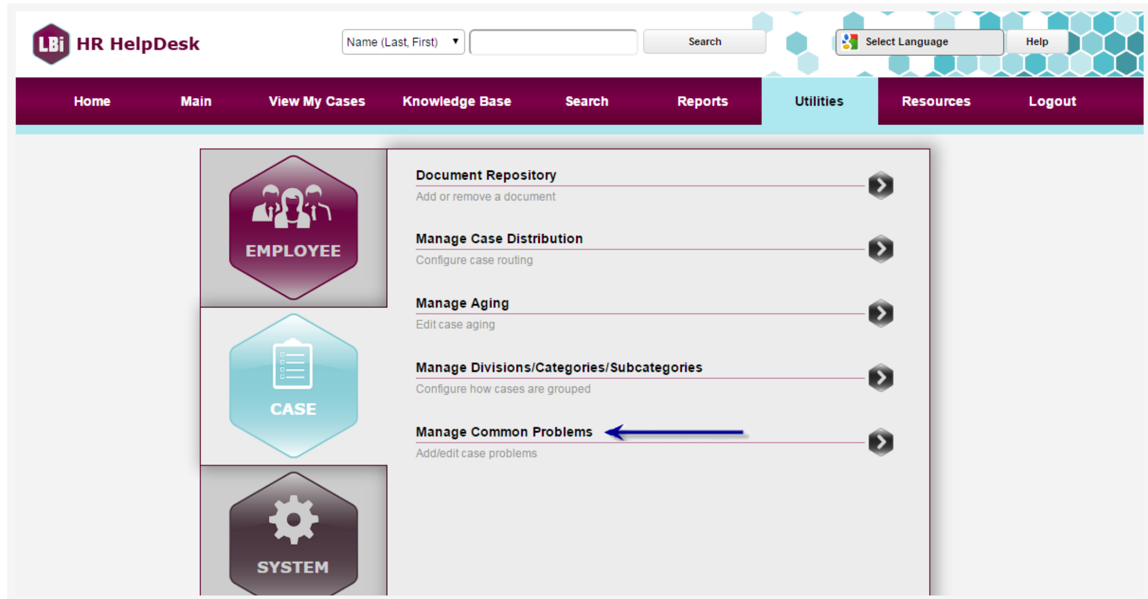
C. Wiki Knowledge Base (available in Enterprise)

A. Common Problems – Knowledge Base

(available in Pro, ProPlus, and Enterprise)

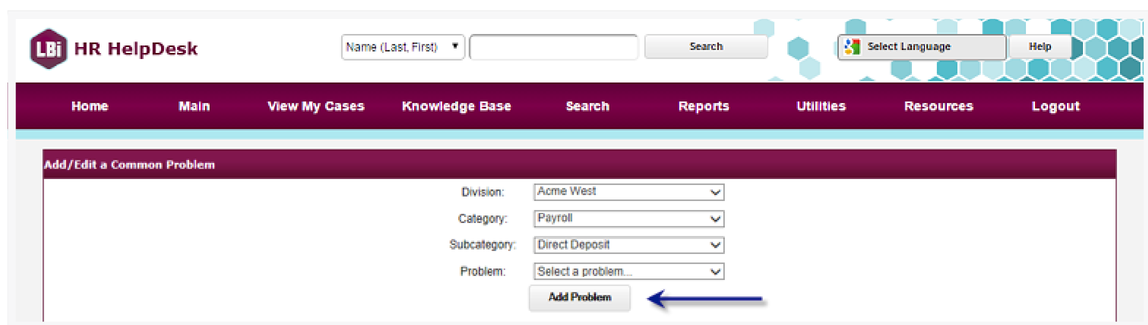
Using the Manage Common Problems Utility, administrators can maintain a list of common problems and their resolutions within a Division/Category/Subcategory structure. New problems and resolutions can be added, and existing ones can be edited or removed.

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.

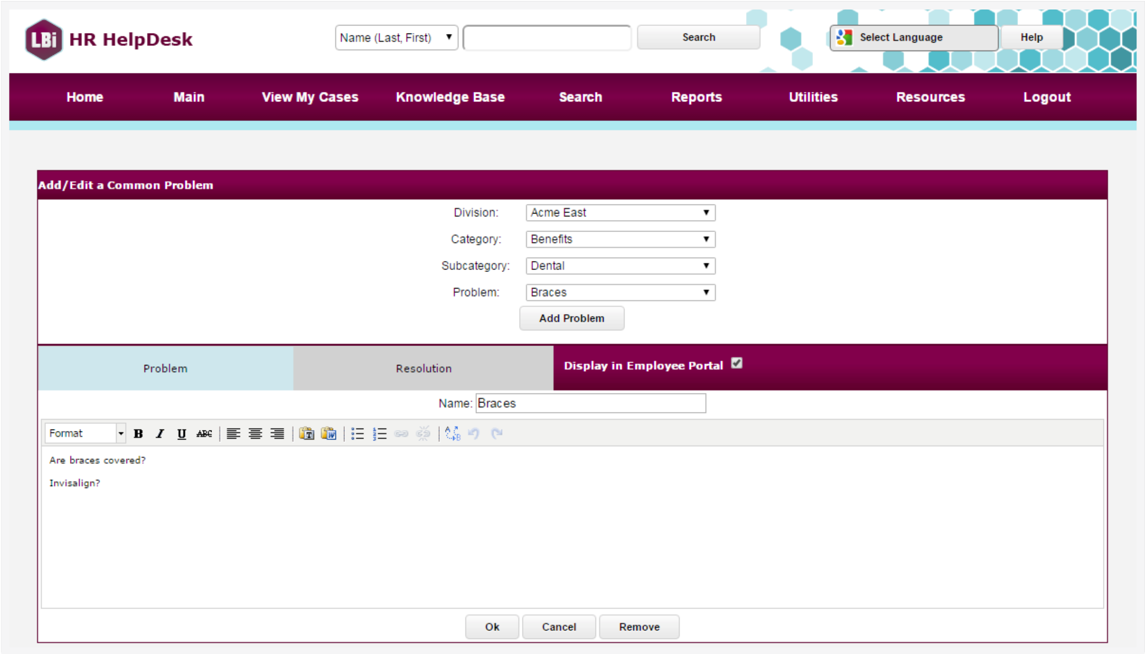
4. Enter a description of the problem (in the "Problem" tab) and the resolution, if available (in the "Resolution" tab). Format the text as desired.

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.

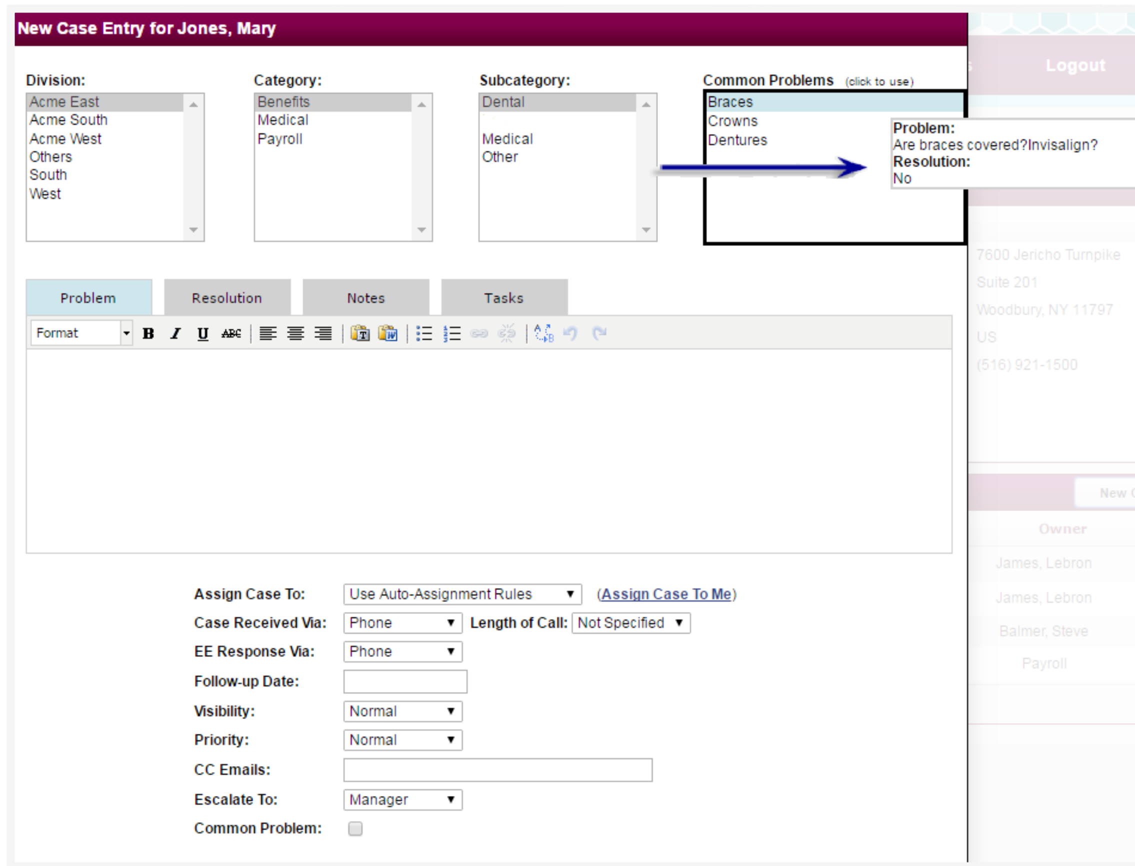
7. Click the "OK" button.

8. Click the "Save" button on the prompt.

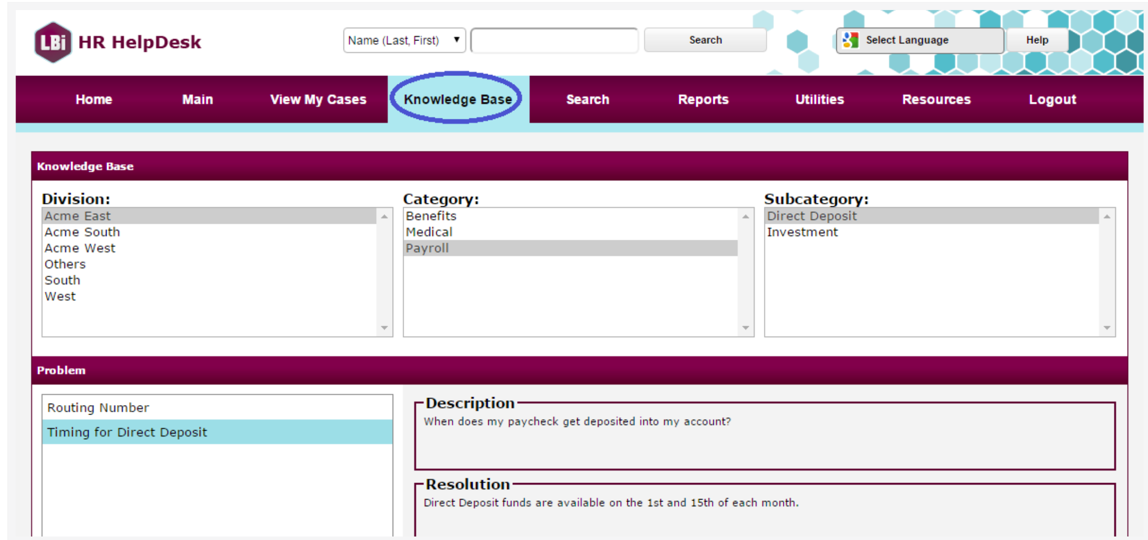


Common Problems are displayed in the following three sections of the system:

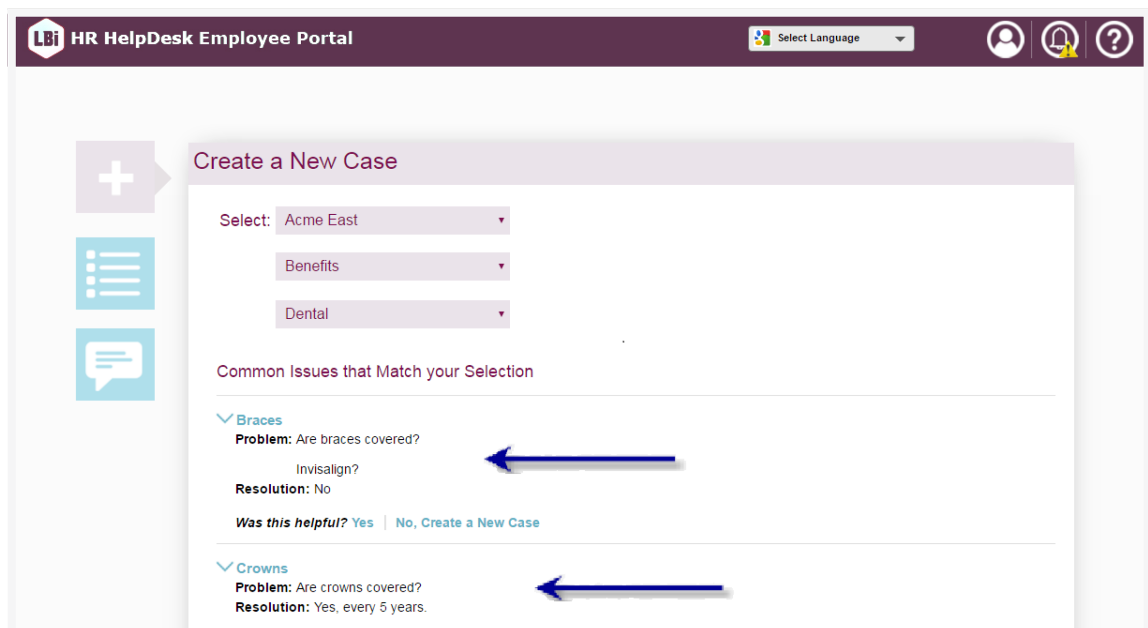
1. New Case Entry Screen



2. FAQ Knowledge Base



3. Employee Portal

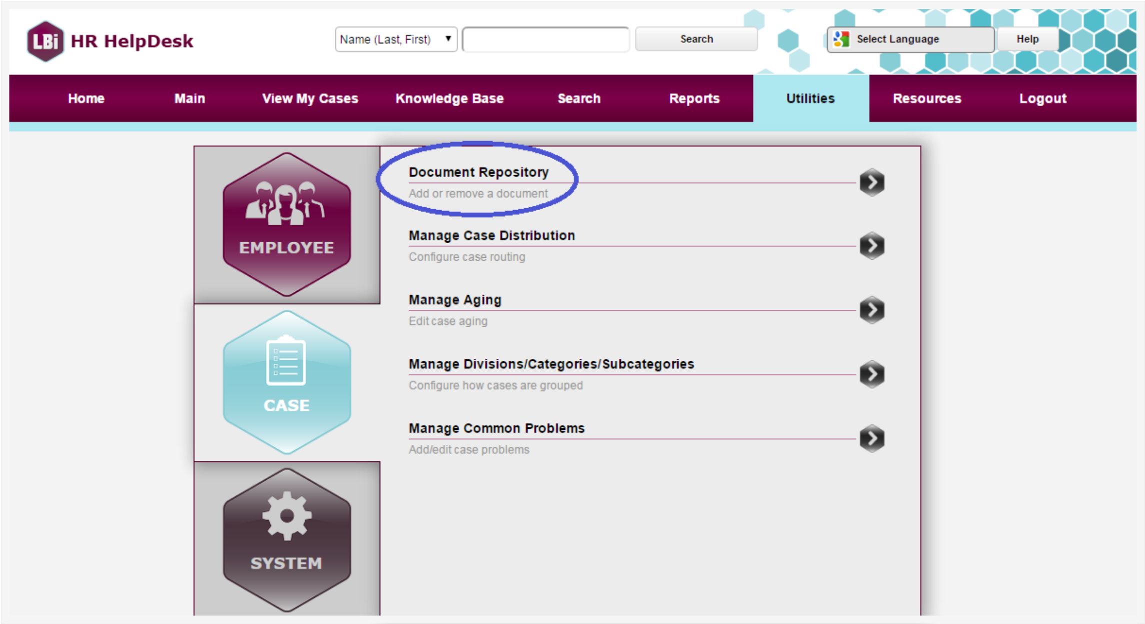


B. Document Repository (available in ProPlus and Enterprise)

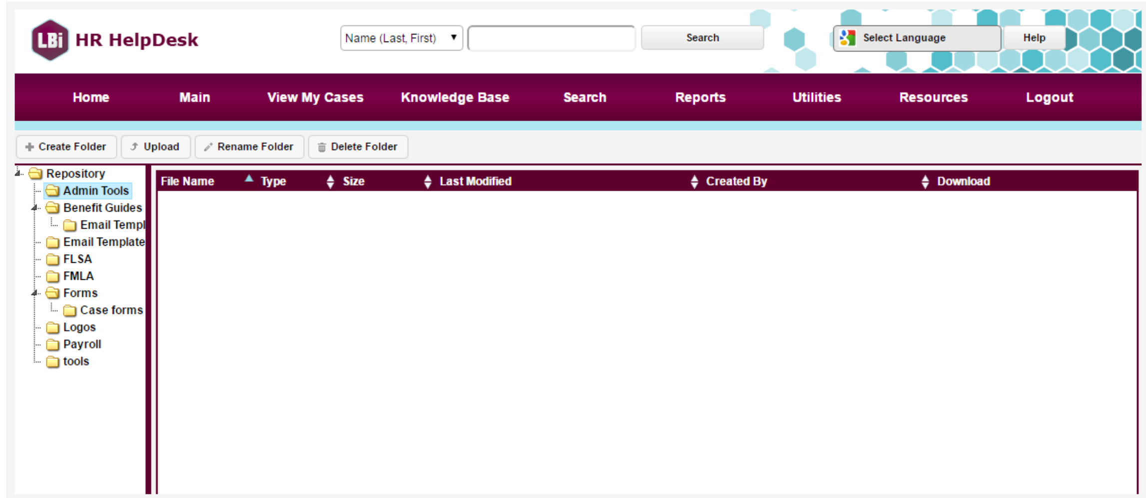
This section of the LBi HR HelpDesk lets you store and organize commonly used forms, documents, and reference materials. Administrators can create folders and subfolders, and upload a variety of file types for easy access. Documents can be attached to cases and can be included using the "Interactions"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

Managing the Document Repository

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

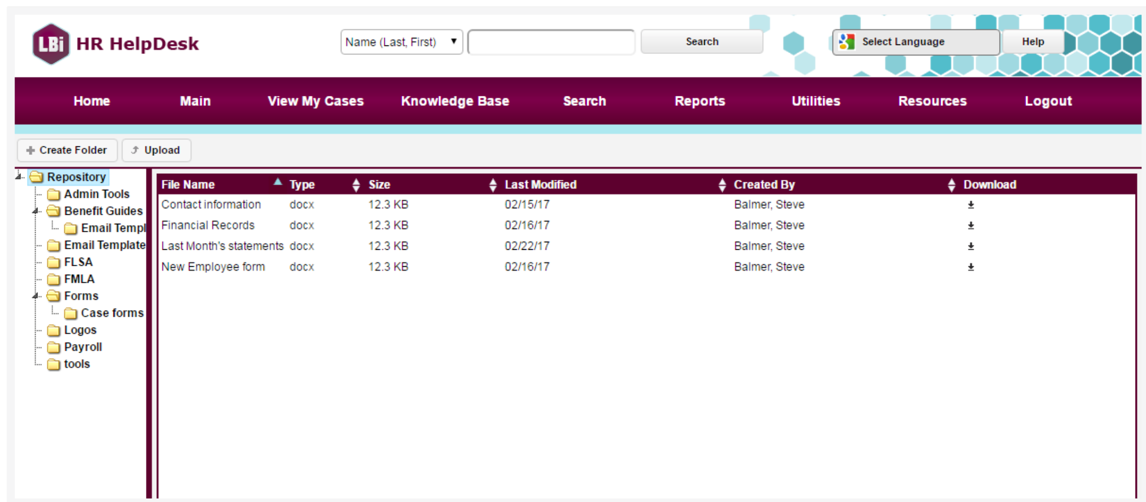


2. Use the “Create Folder” and “Upload” buttons at the left to add folders and documents.



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

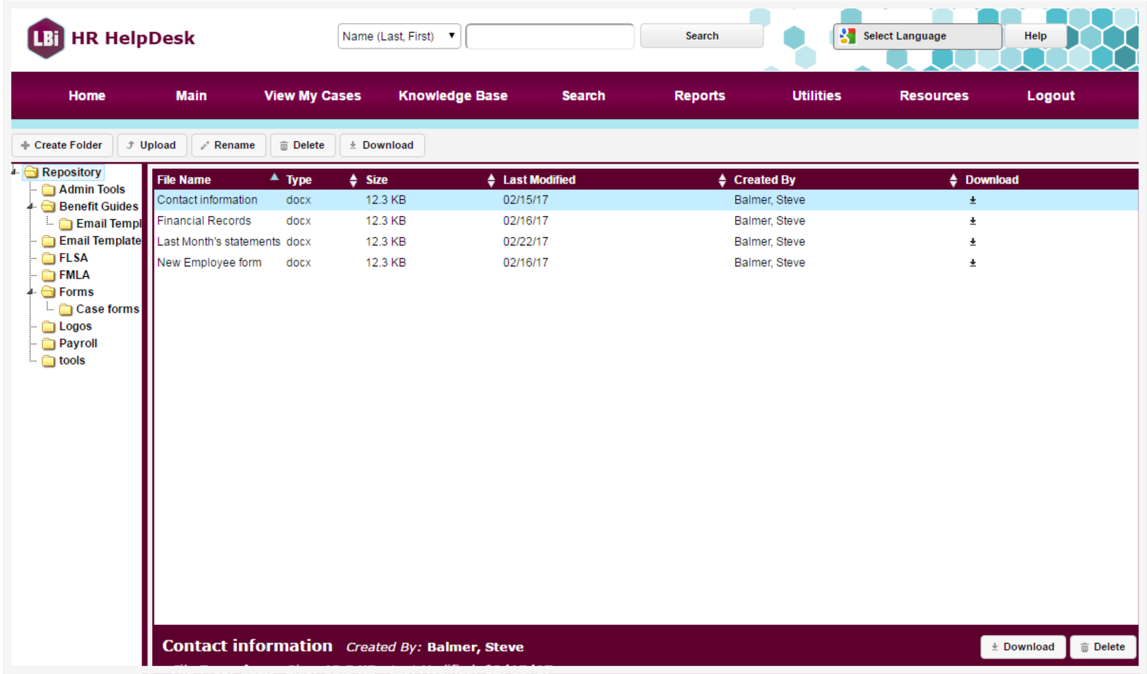
Note: Folders cannot be deleted if they contain documents.



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.

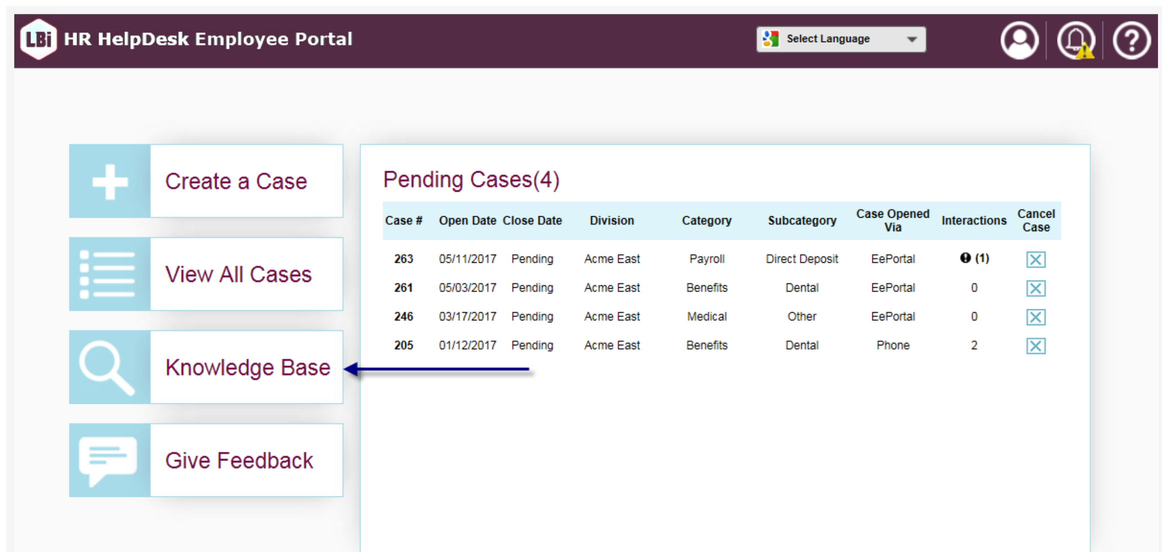
C. Wiki Knowledge Base (available in Enterprise)

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

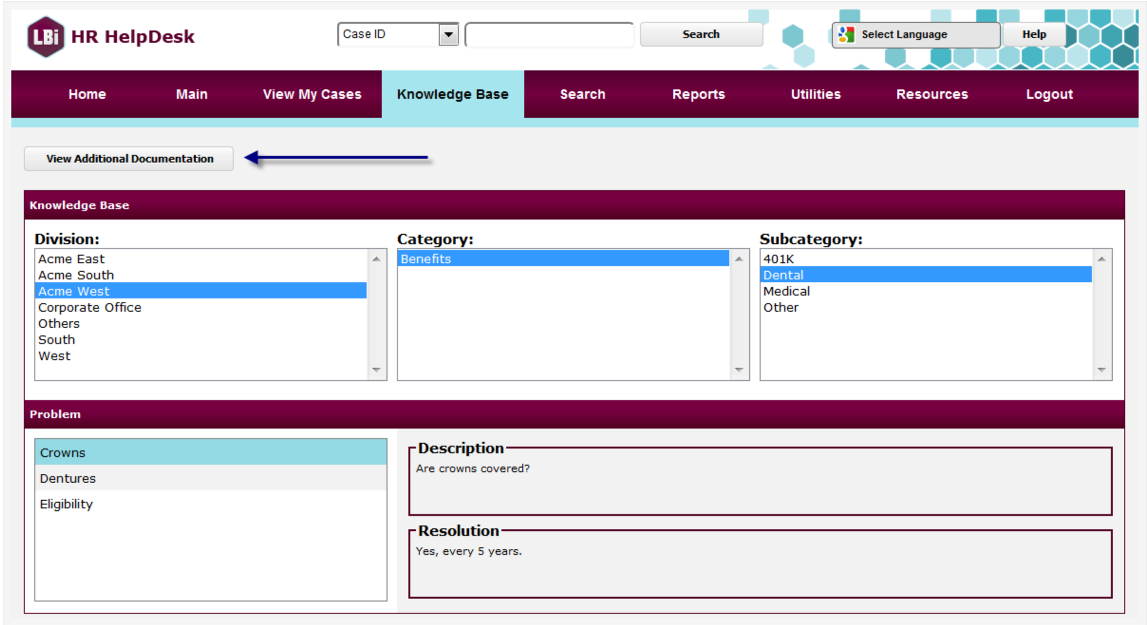
1. From the Employee Portal, click the "Knowledge Base" button.

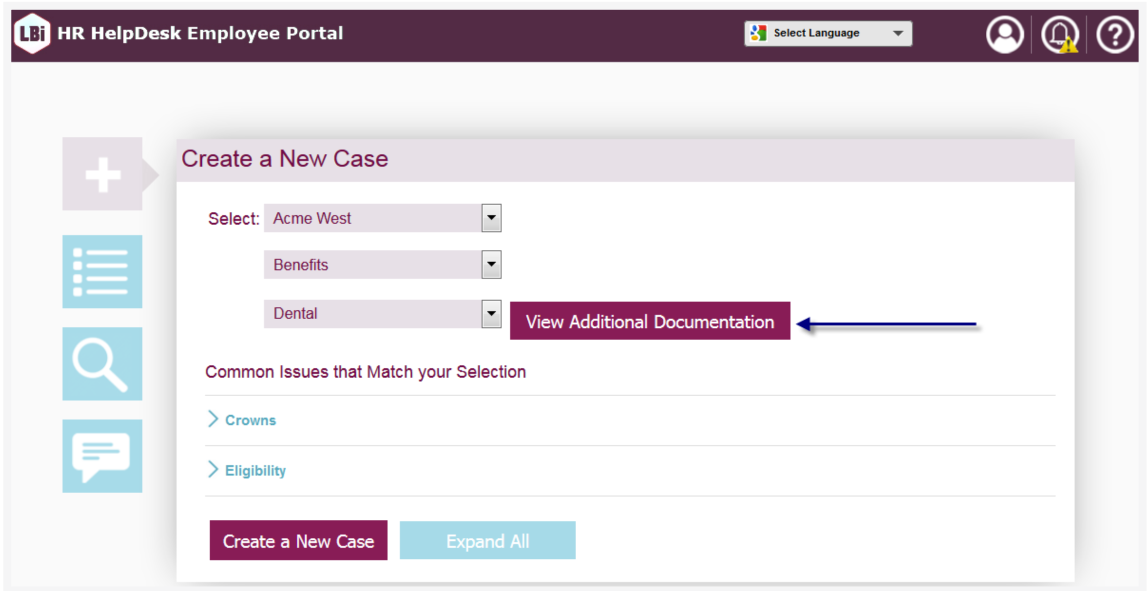


2. From the Main Application, select the "Knowledge Base" option on the menu bar.

3. Click the "View Additional Documentation" button.

4. On the New Case Entry screen, select "View Additional Documentation."



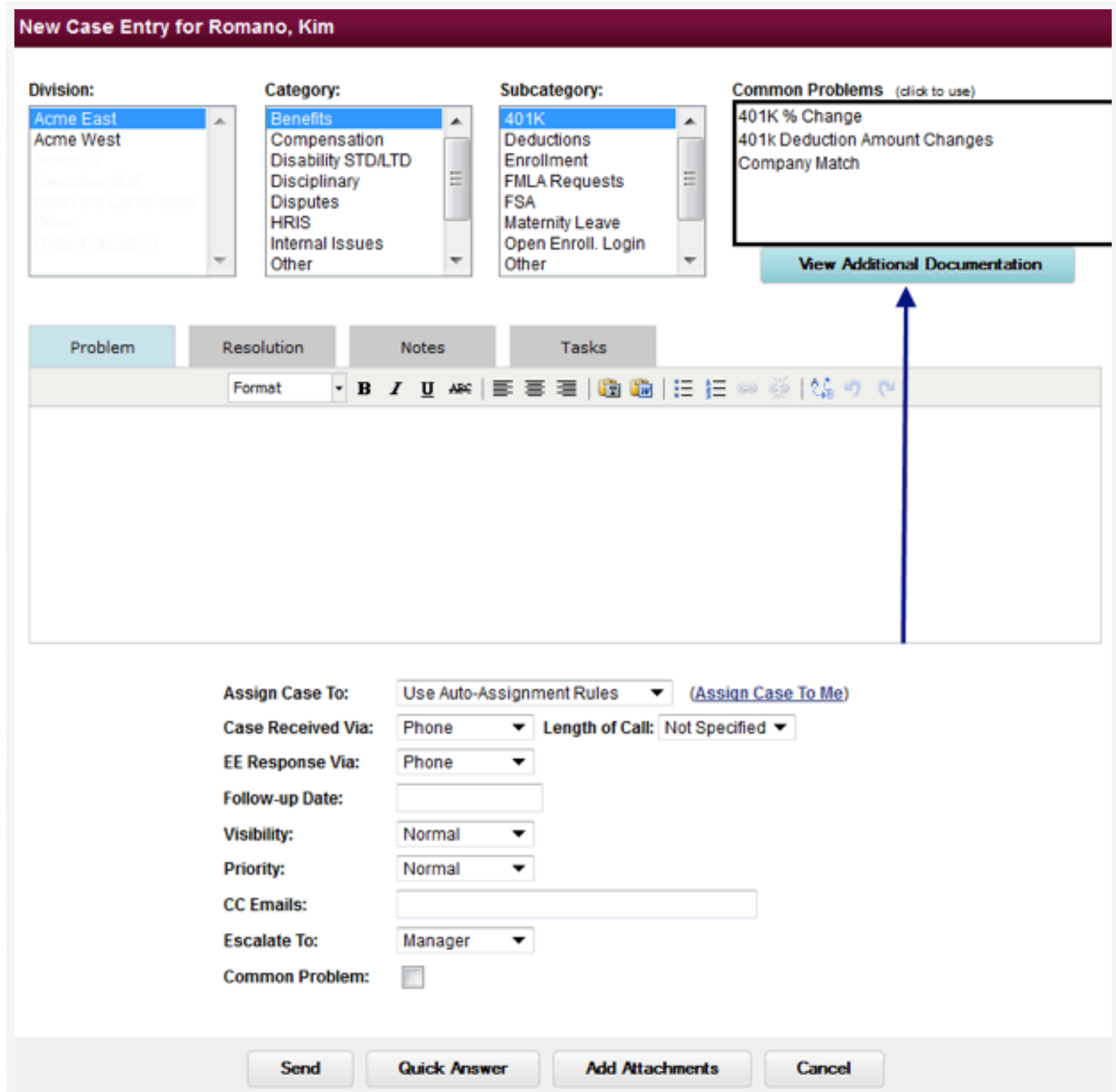


Using the Wiki Knowledge Base

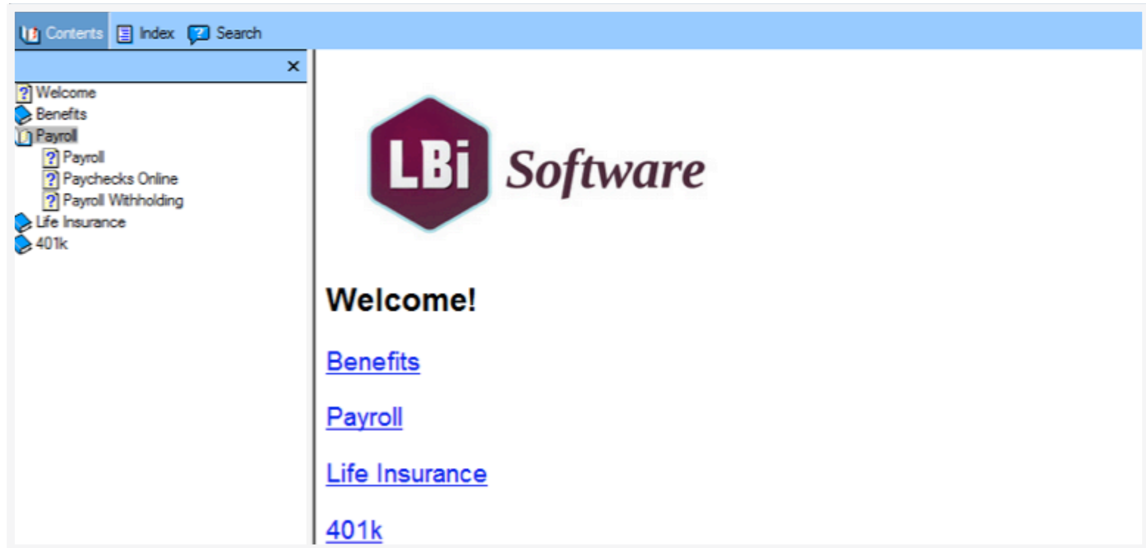
The Wiki Knowledge Base has a similar layout to the Help screens, with the content navigation panel and tabs on the left side and the content documentation panel in the center.

Content Navigation Tabs

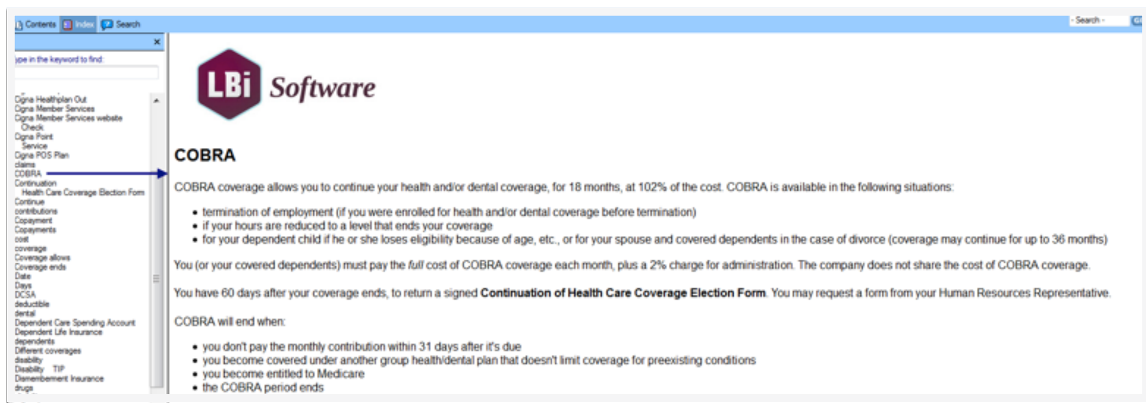
- **Contents –** displays the topics and documents in folder format
- **Index –** displays a list of all topics and documents within the Knowledge Base that can be selected, for easy access
- **Search –** allows the user to locate information using keywords



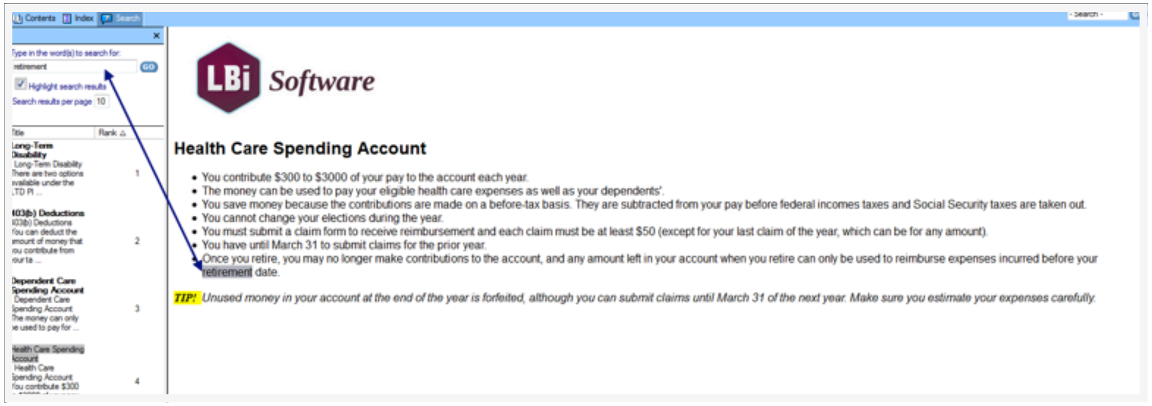
» Contents



» Index



» Search


Contents
Index
Search
Type in the word(s) to search for:
retirement
GO
Highlight search results
Search results per page 10
Title
Rank
Software
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 incomes 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.