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## PEOPLELINK – AN HR CASE MANAGEMENT SYSTEM AT SCHNEIDER ELECTRIC SYSTEMS

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### **ABSTRACT**

Human Resource organizations are faced with the dynamic challenges of providing rapid and high quality service to their workforce while optimizing the costs. Changing equations of human resource management and transition of human resource into a global level are some reasons. Increasingly, HR staff is faced with managing employee queries and interactions directly, over telephone and through email correspondence while still providing accurate, consistent solutions and assistance to employees throughout the organization. Human Resource service delivery can be inherently inefficient without organized call routing, query resolutions, intuitive case management, balanced workload among the staff, or effective self-service options. Many organizations already have various systems to handle these queries. But that alone cannot solve the queries particularly if the organization serves a diversified, growing, multinational, or restructuring workforce. HR organizations worldwide have deployed HR Help Desks to navigate their HR service delivery from request to resolve, allowing their secretarial staff to focus on strategic business practices and core HR issues. In this context the importance of a HR Case management comes into picture by enabling employee self service solutions. HR Case Management system is an IT enabled knowledge management and information system which effectively manages all the non value added interactions and queries. Case management, sometimes referred to as vibrant, highly developed, or adaptive case management (ACM), is a new technological approach to supporting knowledge workers that comes out of business process management. In this article PeopleLink - a tailored HR Service Delivery solution to optimize the performance of the department as per the specific requirements including field customizations and business process workflow customizations is revealed. The Operations and HR Customer Service function within Schneider Electric Company were focused on finding a HR solution that was simple, easy to access and streamline, repeatable, ensuring high performance, and offered quick data entry and record search capabilities.

KEY WORDS: PeopleLink, tracking, HRIS, Schneider electric, ticket, Management system

#### INTRODUCTION

Human resources shared services on a daily basis handle service requests ranging from simple benefits and payroll queries to on-boarding and off-boarding staff or handling complaints. HR's traditional information management systems even though manage many data management driven HR activities; usually do not effectively manage the service-based, people queries or interactions. Existing systems are too complex to be truly effective in a dynamic HR environment. Hence, there is an increasing level of dissatisfaction, non confirmation or lack of productivity in the resolutions through email correspondence, other personal productivity applications, and manual activities when fulfilling HR service relationships. In fact, it is estimated that, for more than 50% of companies, HR functions still spend too much time on day to day activities that add little or no value to the business. Considering this inefficiency with a lack of accountability, tracking, and real-time reporting, and it becomes difficult to understand, measure HR performance and its impact on the business.

In an organization service relationships exist throughout the enterprise between HR and marketing, finance operations, IT and so on. And even between internal and external service providers. These services comprise a definite request for information, a product or a service, a change, or assistance with an issue. These service relationships not only necessitate control, they should be assisted by automation wherever possible. Such complexity needs to be successfully managed to ensure both the timeliness and entirety of delivery.

Best practices across all industries advocate that a case has to be created for every inquiry that is handled by a SPOC (single point of contact), irrespective of how common the question or issue may be. HR Case Management system delivers complete query handling capabilities, enabling HR organizations to capture and categorize employee enquiries, analyze case trends, and guide staff through case management best practices.

Employees expect to have technology supported options for finding solutions to their HR issues and queries. Some prefer to use self service or a knowledge base to search for the solution themselves at anytime from anywhere. Others prefer talking directly to an HR representative. HR Case management system enables an HR organization to provide a range of channels that workers may leverage to engage HR. Varying from lower cost channels like self-service, chat, and email, telephonic conversations make it simple for employees to find the information they are looking for while providing a consistent employee service experience.

In Schneider Electric, HR Case Management System (PeopleLink Service Centre) is implemented to automate and record the HR query handling and other interactions which will supplement the increased productivity and efficiency of HR Services. A problem in this context is that the usage of the PeopleLink is not up to the expectations. There are about 19,000+ employees in Schneider Electric India who have access to PeopleLink Portal. After becoming functional on November, 2013 PeopleLink has only generated less than 1700+ service requests (employee queries). Month wise trends show that the queries raised through PeopleLink are decreasing in numbers and there is a need arises to understand why there is a decreasing pattern in the number of queries coming through PeopleLink and very low level of usage by the employees.

It is assumed that there can be two reasons for the decline in the number of queries coming through PeopleLink. Either it can be because of the awareness among employees about PeopleLink or the dissatisfaction arises out of using PeopleLink. Hence a study has been undertaken to understand the reason for the low usage of PeopleLink as an effective HR Case Management System.

# 2. NEED FOR A HR CASE MANAGEMENT SYSTEM

Most Human Resource departments utilize a variety of software applications or tools to manage the various functions within the department such as Labour, Payroll & Expenses, Compensation, Benefits and Performance. HR Case Management provides a supreme management system. By considering the challenges faced by HR Services department and the scope of implementing an automated support for HR Services will help improve HR service delivery and performance, and to develop the business insight and the value it delivers. The advantages of an HR case management system are both functional as well as strategic. HR is enabled to function more efficiently and cost effectively at the same time provide insights it needs to take action before complaints become prevalent or do adverse impact on the reputation of the department. Automated HR Case management system can:

• Improve HR Service Delivery and Increase Responsiveness by transforming HR organization and its services more accessible to employees from anywhere through the online web based platform, automate activities to increase the speed of delivery and reduce human error, and improve consumer experience and satisfaction

- Improve Decision Making & Analytics through effective HR resource utilization and clearly understand the quantity and types of service requests to determine opportunities for service enhancements, increased efficiencies, and to drive improvements in service levels. Cases can be tracked and reopened even after they're closed. Companies that implement case management systems can improve their knowledge base from their experiences and apply the trends and data coming in analytics to improve performance. Historical or closed cases become resources and a stock of information for better outcomes in the future.
- **Single System of Record** is one of the features that support the HR Case Management system since it can remove multiple databases maintained by numerous HR staff. Benefit is to improve accuracy, agility, and economies of scale through an organizational single system of record. Many a times information related to a single case is spread across the organization. Some with Employee relations function, some with managers, some in paper files, some on other channels etc. A case management system eliminates this disorganized storage, serving as a convenient, consistent and secure data record system.
- Improve the productivity of HR fraternity by focusing on the core activities. It is estimated that, for more than 50% of companies, HR functions still spend too much time on day to day activities that add little to no value to the business. Resolving the service queries are mostly historical in nature and many employees can have the same queries. Spending too much time on such interactions can reduce the productivity of HR fraternity. HR Case management system is an automated and organized way of managing all these queries and interactions.
- Patterns or trends or queries can be tracked by HR Case management system. Every organization may handle employee queries and workplace disputes adequately but how it can track and record these makes a difference. In a close observation one can understand whether these queries are occurring most frequently or have any patterns related to the queries or the subject of the query. What types of queries are recurring and large? Which function under HR Services or which HR staff or group is getting maximum queries? These are few patterns coming on this scenario.

#### **REVIEW OF LITERATURE**

Sanchez, Jose; Aguayo, Mariano (2007), evaluates in their study the integrity of Human Resource Information System (HRIS) in the context of business management. The study aims to generate knowledge on the main structure for the successful implementation of HRIS and to process variables connected with HRIS success and to quantify their impact on associations. They propose that HRIS is the future of HR Services and the possibility of establishing an automated support for HR Services which enables good decision making.

Mohanty, Madhuchhanda; Tripathy, Santosh Kumar (2009), is of the opinion that information is vital to the survival and growth of the firm. The human resource function is most essential, has to be performed in conjunction with the strategic purposes of the firm and is primarily responsible for integrating all parts of the enterprise through information systems. When allusion is made to the Human Resource Information System (HRIS) in today's milieu of high tech wizardry, it is often thought as a business gizmo that allows for standardization in the assembly of information about and for a company's employees. Although this was the original purpose of HRIS, many additional purposes are beginning to surface. Most of the studies made on HRIS are descriptive, nonspecific and generic in nature and far from empirical and sensible bases, while the HRIS set-up in India has largely remained unexplored.

**Troshani, Indrit; Jerram, Cate; Hill, Sally Rao (2011),** ascribed that champions in public sector organizations should reveal HRIS benefits before their adoption can be successful. With standardization trends adopted by HRIS vendors, complete organizational fit between adopted HRIS and business processes may be indefinable for adopters suggesting that post-adoption vendor support must be negotiated if costly customizations are to be minimized. In addition to various institutional factors, including management obligation and human capability, the authors also find that broader environmental factors including regulatory conformity can have a deep impact on the success of HRIS espousal by creating necessity in adoption intentions.

Chauhan, Akansha; Sharma, Sanjeev Kr; Tyagi, Tarun (2011), state that the role of HR is becoming pivotal in the twenty first century. As organizations face rigid market and other external pulls and pushes, the HR becomes vital source for managing potential challenges. A strategic HRIS provides significant information about human resources needs and competencies; this information assists the managing team

in establishing the organizational mission and setting goals and objectives in action. Considering this framework, this paper aims to study the use of HRIS in improving HR operations. Particularly, it focuses on the need of HRIS in the performance of HRM functions at the lowest possible cost and also at a fast rate, which pose increased challenges for HR professionals. Organizations have started to automate these functions by introducing HRIS technology. **Irfan Saleem (2012),** says that in knowledge based economies, cross-sectional studies are needed to unearth missing linkage between Human Resource Management and Information Technology. Consequently Human Resource (HR) researchers and managers need to rethink about achieving organizational objectives with and through the people added by restructured technology in this information age. Findings show that HRIS adoption significantly impacts HRM operational processes and moderately facilitates its functional processes and provides insignificant support for Strategic HRM processes.

Kock, Henrik; Wallo, Andreas; Nilsson, Barbro; Höglund, Cecilia (2012), explains that HRIS will take a broad, strategic and proactive role in relation to its customers. However, due to external and internal constraints, such as the HRIS internal work processes, the nature of assignments and the client's HR competence level, the roles that HRIS play in practice tend to be more specific, operational and reactive. An important challenge for HRIS is to avoid being overwhelmed by shortterm and reactive assignments that deliver value to their clients through the use of standard solutions. Long-term relationships, the structures of ownership and membership, and the availability of unique networks can also prove to be valuable for clients. In this article, the area of interest is an emerging type of organisation called human resource intermediaries (HRIS), which focus on delivering human resource (HR) services to public sector organisations and private companies. The purpose of this article is, thus, to explore HRIS as deliverers of HR services. More specifically, the article will seek to analyse and discuss how employees in HRIS understand their role as providers of HR services to their clients and what characterises the HRIS' work and the nature of their assignments.

**Obeidat, Bader Yousef (2012),** is of the opinion that there is a positive relationship between innovation diffusion and HRIS. More specifically, it was found that there is a relationship between relative advantage, compatibility, trial ability and observability on the one hand and HRIS functions on the other. However, it was found that there is no relationship between complexity as a dimension of innovation diffusion and HRIS functions. The purpose of this study was to investigate the relationship

between innovation diffusion and human resource information system (HRIS). The theoretical framework of this study is based on the previous literature discussing innovation and HRIS.

Normalini Md. Kassim, T. Ramayah, Sherah Kurnia (2013), suggest that information technology (IT) appears to serve as an empowering function for HR professionals, providing a medium in which HR professionals can provide increased value in their work. The paper will help organizations in the implementation or deployment of new information technology products, systems or processes. Organization can now ensure a smoother implementation plan by addressing the attributes of the innovation that will most likely concern its employees.

Emeka Smart Oruh (2013), analyses the human resource information system in the Nigerian banking sector. In this study he argues that HRIS drives effective organisational learning, appreciable productivity and above all sustainability in the era of challenging and changing human resource management strategy for organisational growth. The challenges of applying HRIS to sustainability in the new media age are compounded by fierce globalisation pressures that are forcing organisations to be web 2.0 compliant in order to link organisational performance to the demands of contemporary business demands. An essential aspect of this challenge is seen in the global call for more sustainable business practice, which the present study contends can be advanced via HRIS.

As shall be demonstrated in this study, a sustainability approach to the Nigerian banking sector debate anchored in HRIS will engender competitive edge, productivity and organisational learning that are central to this. It is on the strength of this, that this study is framed. Also, this study is a conceptual paper based essentially on extant literature on the various themes outlined above. Thus, attempt is made to extend knowledge on the present sustainability debate in the Nigerian banking sector by critiquing approaches including using the framework of HRIS to advance this in the sector.

## PEOPLELINK - HR CASE MANAGEMENT SYSTEM OVERVIEW

PeopleLink is a **Schneider Electric** company, branded HR Case Management system. It was implemented in association with **Column Technologies** service provider. Schneider Electric is a French multinational corporation that focuses on electricity distribution, automation management and produces installation

components for energy management. Column Technologies is a global software provider specializing in business service and process management solutions for public and commercial markets. Case management software is one of the key software solutions of the company. Column Case Management is a workflow-driven web-based case management software solution that include data and relationship management, service intensity, a warning and e-mail engine, documentation and file management, knowledge management, task management, a design and customization layer, employee self service portal, user configurable dashboards, and additional reports.

HR case management systems are created specifically to record comprehensive information related to the employee's interactions with Human Resources and Employee Relations. Following are the objectives of People-Link HR Case Management System

- Single point of contact in HR for all HR queries
- Sefficient and consistent delivery of standardized HR services & business processes
- Consistent and effective timelines for resolving all HR queries
- A well defined escalation matrix and service level agreements
- Navigation of HR queries and proper work allocation
- Reducing the overburden of non value added
- Tracking and recording of all HR queries to maintain a database
- Improve human resource Service Delivery and Responsiveness
- ➡ Improve Decision Making & Analytics
- Single System of Record
- To empower the human resource and ensure information records and flow.

## SUPPORT MODEL OF PEOPLELINK HR CASE MANAGEMENT SYSTEM

## Tier o – Employee and Manager Self Service

- ⇒ Predefined and tailored answers to basic inquiries Knowledge base
- ⇒ Easy to use portal to search and find the solutions to the queries

## Tier 1 – Employee Relationship – Help Desk

- → Predefined and appropriate solutions to basic inquiries Knowledge Base → Acting as a first point of contact of employees as a relationship team
- → Query resolution with the available knowledge base
- → Categorizing and assigning the unresolved queries at this level to the higher level

### Tier 2 - HR Services Level

- → Query resolutions, Problem solving and application of policies
- → Managing procedures, policies and corporate strategy
- → Advice and counsel critical problem solving and incidents

## **Tier 3 – Centralized HR Management Level**

- Forecasting and organizational analysis for Organizational Development
- Policy and procedures design and implementation
- ☼ Transformation towards HR best practices

#### PEOPLELINK PORTAL INTERFACE

There are various sections such as Knowledge Management (Support), Ticket creation palette, and Ticket Status updates in the main window itself. An employee can first search for the solution in the knowledge base section and if it is not satisfactory, he / she can proceed to create a new case. Cases are categorized under different groups such as, Benefits, Compensation, Human Resources Policies and Programs, Learning and Development, Payroll, Systems (HRIS) and Talent Acquisition.



Watcome, SUHAIL AL Schneider **Ticket Creation** Search Services Human Resources Policies and Programs Learning and Development Priority Talent Acquisition Ticket Status Updates se,people link@schnelder-electric com Usetul Tios My Requests Submit Date Case ID ASE-0000020 Training Cost 11/6/2013 11:50:30 Open CASE-0000692 test please gnore CASE-0000536 Benefits 9/5/2013 10 57 33 AM

Figure 1: PeopleLink Portal- Main interface screen

(Source: Screenshot taken from the PeopleLink online portal. The researcher has access to the portal)

There are predefined case descriptions or case categorization under each of these main groups. This is one of the major advantages of PeopleLink case management system. All the cases will be very properly grouped, categorized and organized to the very minute level which enables the HR Services department to understand the typical queries of employees with an overview of the function related to it.

For example, if an employee has a query regarding the leave policy, then he / she can visit PeopleLink Portal and first search for the key word "leave policy" under the knowledge base section. This query produces all results related to leave policy. There will be multiple subjects related to leave policy and he can choose the specific query to resolve his concern. If the search results do not yield proper solution for the specific query then as a new step a new query can be created. For this, under the Ticket Creation palette, the service or major area of the query is selected. Various services classified in the PeopleLink as main group are Benefits, Compensation, Human Resources Policies and Programs, Learning and Development, Payroll, Systems (Human Resources Information System) and Talent Acquisition. In this particular case, Leave Policy will come under "Human Resources Policies and Programs". On choosing this service, a list of categories with a brief description will be displayed. Most appropriate category can be selected and then write an explanation or comment on the query to create the case.

Every new case will be associated with a case / ticket number which can be referred for all the further communications and transactions with PeopleLink Help

Desk. An automatic email notification will be sent to the employee who raised a new case (Requester) as well as to the PeopleLink Help Desk.

## PEOPLELINK CASE MANAGEMENT INTERFACE

Case Management tool will be used by PeopleLink Help desk team & HR Services team to work at the backend on the ticket raised by employees through Self Service tool.

## **Case Console:-**

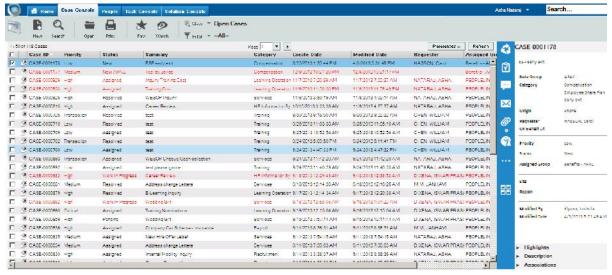
Case console ensures to keep a record and track of all the HR related queries from an employee. There are various reports and information can be downloaded from the system which is very relevant for HR Analytics to improve the decision making and future performance by analyzing the patterns or trends. Case console provides the information about the quantity and types of service requests to determine opportunities for service enhancements, augmented efficiencies, and to make improvements in service levels. Cases can be tracked and reopened even after they're closed. Historical or closed cases become resources and a stock of information for better outcomes in the future.

Below is a screenshot of the case console tab available under the Case management tool. This lists out all the cases as a database. Case ID, Priority of the case, Current status of the case, summary of the case, category of the case, creation date, modification date, Name of the requester, Assigned group etc are few of the details which are automatically captured and stored in the database.

Under the case console, individual cases can be opened and reviewed by the help desk executives. Case is

either resolved at this level and case can be modified by adding further comments or clarity on the case category or descriptions. Automated email notifications and customized messages can be triggered to the employee (requester), assigned person or group.

Figure 2: PeopleLink Portal- Case Console Page



(Source: PeopleLink Project Overview & Readiness corporate presentation, Schneider Electric, 2013)

#### **Case Creation:-**

PeopleLink HR Case Management has lots of flexibility in terms of the case creation. Usually an employee creates a new case by following the support workflow. But a query can be raised to the PeopleLink Help Desk through an email or a telephone call since it is a multi channel help desk. At present only a few of the countries support telephone calls for query resolution. In such situations usually a case is not created. PeopleLink help desk may ask the requester to raise a ticket on the portal or can create the case by using the administrator access. All the main data fields, case categories, requester's name and employee IDs are to be entered in order to record the case summary. This will generate a new case and case ID for future references.

### **Case Templates:-**

All the case templates are available to the case creator to be followed for organizing all the queries under relevant sections. It is available under the case console under the new case option. All the services are listed under the case templates along with the case categories and case description.

## Case Updation:-

An existing case can be updated using this option to modify any errors in the case, case category or case description. Also this feature allows tracking the recent changes, status of the case and recent updates happened to the case.

#### Attachments or documents:-

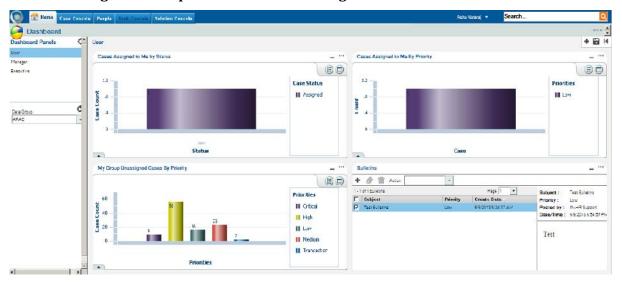
This feature allows an employee (Requester) or a case creator (Help desk support executive) to attach any documents which is required as a supporting material or relevant for resolving the query or a screenshot which explains the problem (usually associated with any HR information systems).

### **Email Case Documentation:-**

This is case which typically reaches to the PeopleLink Help Desk through an email communication. Email case documentation allows the HR Case Management system to trace such cases in the system data base. Under the new case creation section, after entering all the "Main case information" and "Description", an option is available as "Case of origin". Case creator selects the option "Email" and document the case.

## **Dashboard & Analytics:-**

Figure 3: PeopleLink Portal Home Page - Dashboard Panels



(Source: PeopleLink Project Overview & Readiness corporate presentation, Schneider Electric, 2013)

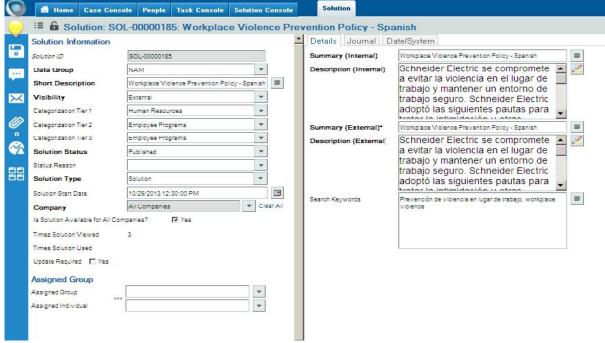
HR Case Management Tool will only be accessible to the help desk team and administrators. Case history, condition of cases, a dashboard which displays the pattern of cases and status are some of the important utilities of case management portal.

PeopleLink tool provides a feature that supports cases to be added into the watch list. Dashboard is available under three self service options: an Employee (user), Manager or Help Desk Administrator (Executive) respectively.

#### **Solution Console:-**

Solution Console is used to upload all HR policies, Processes, FAQ's & other documents to the Management Database of PeopleLink -HR Case Management System. By analyzing the recent pattern or past cases, new cases or highly repeated cases can be identified. Most appropriate solutions can be updated using the solution console.

Figure 1.7 PeopleLink Portal Solution Console - New solution screen



(Source: PeopleLink Project Overview & Readiness corporate presentation, Schneider Electric, 2013)



Solution console systematically stores the knowledge base with new solutions or modifies existing solutions in a standard template. Each solution is updated in a pre-defined template which records the solution and categorizes it into various tiers.

## CONCLUSION AND SCOPE FOR FURTHER RESEARCH

A good case management system facilitates the help desk service to efficiently handle a large number of queries, requests and problems without losing any information or letting things fall through the cracks. HR Case Management brings the same ideas and capabilities to an HR organization but instead of dealing with product questions or issues, the company will deal with employee questions and issues. The use of an HR case management system will make sure that all important interactions with employees are tracked, that compliance with legal and regulatory standards is maintained, that the service provided is consistent and timely, and that all records are securely housed in a single location that is easily accessed by all suitably credentialed staff members.

PeopleLink is Schneider Electric's internally tailored, branded HR Case management system and employee self service centre. PeopleLink support model has great significance in delivering enhanced employee experience and to lead the transformation within the HR Services. Deficiency of awareness and dissatisfaction of employees due to perceptions resulted in a very low utilisation of PeopleLink at Schneider Electric. Therefore proposals have been taken by the company to tackle with employee issues and educating them through various awareness sessions to become a part of HR Case Management system in order to enable higher efficiency and experience. PeopleLink can be beneficial to both employees as well as HR staff by minimizing time spent on non-value added activities and to focus more on strategic tasks.

Some case management solutions were used to capture knowledge that can be stored in a knowledge base and help solve future cases. Storing knowledge independently from case information is preferable because cases typically contain a bunch of information that may not be relevant to solve an issue in general terms, plus a case will habitually hold confidential personal data. Another issue is that cases tend to be packed with vocabulary variations that can make text searches and analysis more exigent.

Case solutions, employment law documents, corporate policies, and other knowledge resources can be stored in the system as Knowledge Articles where they

can be searched easily. When a new Knowledge Article is developed in reaction to an employee query or issue, the HR Advisor describes the situation as well as the solution in general terms and in a familiar vocabulary, and then relates it to the case. The new Knowledge Article is also instantly made available to all other HR staff so if the question or issue comes up again, it can easily be found and used to help resolve the new case. In this way, it is extremely easy to see if a given query or issue – however worded – comes up repeatedly. Hence a future research can be undertaken to identify the potential benefits and drawbacks of the knowledge article in enterprises using HR Case Management Software.

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