

Trend Micro, a global leader in IT security solutions, needed a PDF alternative that would deliver on functionality and pricing to support its HR operations in 23 different countries.

Discover how pdfDocs enabled them to transform many of their document workflows and approval processes with more efficient digital ones ...



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## Trend Micro uses pdfDocs as PDF alternative to deliver significant cost savings and productivity gains

Trend Micro, a global leader in IT security, develops innovative solutions that make the world safe for businesses and consumers to exchange digital information. With over 25 years of security expertise, they are recognized as the market leaders in server, cloud and small business content security. Trend Micro enables the smart protection of information with security solutions that are simple to deploy and manage while accommodating an ever-changing ecosystem.

### The business challenge

The Human Resources department works with a variety of document types; contracts, resumes, appraisals, reviews, forms, and applications that need to be shared internally with legal, finance and other HR staff as well as distributed externally to recruitment firms, applicants and other parties. The Portable Document Format (PDF) is perfect for collating, securing and distributing documents.

The Trend Micro HR team has 17 staff members based in Ireland, France, Italy and the UK supporting its worldwide operation in 23 countries. The team wanted everyone to have the ability to create and work with PDFs. While their legal team used a PDF application for editing documents, it was too expensive to deploy to the entire HR team. Trend Micro HR decided to look for an alternative solution.

The team was introduced to DocsCorp by their technology partner Ascertus. "We were initially interested in pdfDocs for creating PDFs, but we saw value in being able to convert PDFs to Word for editing and repurposing content. This would be particularly useful when we need to make quick changes to documents if either the original document or its author were unavailable," recalls EMEA HR Program Manager, Aideen Shannon.

"The more we saw of the application, the more we realized we could streamline our business processes and workflows significantly," continued Aideen. "For example, out-of-the-box integration with our OpenText eDOCS document management system would enable us to create and save PDFs directly into the DMS." Furthermore, the pdfDocs Binder feature could be used to create electronic PDF binders for emailing or archiving. In short, it was a product that could be rolled out to everyone given its functionality and attractive pricing. The team presented the business case to the Business Applications (BA) team. pdfDocs would be transformative, it would help them become more agile, more efficient. It would also enable them to comply more easily with their own internal security.

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Aideen Shannon  
EMEA HR Program Manager  
Trend Micro

## Our solution

Almost immediately pdfDocs transformed many manual, labor-intensive processes into streamlined, integrated digital workflows.

Previously as part of the audit process, the HR coordinator would send documents to the auditor. However privacy and security are extremely important when sharing documents, and documents often had to be redacted of private and confidential information. The previous workflow consisted of printing the document, redacting information with a pen, scanning the document to PDF, which was then sent to the auditor. pdfDocs reduced this labor-intensive workflow to a few mouse clicks. Now the HR coordinator simply searches the document for a word, or string of words and applies the redaction to every instance of the word. The software can accommodate a redaction approval workflow. For example, a user can mark up the document with proposed redactions, email it to a manager or supervisor who can apply the redactions needed, deleting any that are not required.

The payroll process was also significantly transformed. The manager no longer needs to be physically in the office to review and approve the payroll. "Instead, I now receive a PDF of the payroll, apply an approval stamp to each payment and send it back to payroll for processing even if I am working remotely or offsite," says Aideen. "This provides great flexibility."

Similar efficiency gains were achieved with commission statements. Before pdfDocs they would print off the commission statements manually by worksheet for every employee. They would then manually check and put each statement into an envelope to be mailed. Now with pdfDocs they extract each worksheet from a PDF document, apply a password for security and email it to the employee.

This new commission statement process was trialed in two countries. Each noticed significant efficiency gains, saving approximately 10 minutes per employee in the printing and stuffing of envelopes. It is anticipated that as the process is pushed out to other offices, there will be even greater savings. For example, 10 mins x 96 employees = 960 minutes, which is equivalent to 16 hours or 2 days per quarter! It used to take 21 managers with commissioned staff approximately 3 days to complete this task. "We believe that this process will deliver further savings as it gets bedded down and the staff members become proficient with the workflow," concluded Aideen.

## Other benefits

"We will be moving forward with the pdfDocs eLearning modules to ensure that all staff members are familiar with the features and functionality of the software. This will ensure that everyone is using the software correctly and it will take the pressure off those power users who typically have to help and assist others when they are struggling with a particular feature or function," says Aideen.

The pdfDocs eLearning system consists of 22 guided modules that demonstrate and test the user's knowledge of the product. The modules can be accessed directly from the application itself; stored on a company's intranet; or added to a learning management system (LMS).

## Summary

Trend Micro is a global leader in IT search solutions. Its HR team turned to DocsCorp and its PDF management application to assist it with its document workflows and approval processes. pdfDocs enhanced managing redactions, approving payroll and distributing commission statements. pdfDocs empowered them to move from manual processes to integrated digital ones.

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Aideen Shannon  
EMEA HR Program Manager  
Trend Micro

KEY BENEFITS
Share documents with external parties safely
Collaborate with colleagues on joint projects
Assemble, edit and publish documents related to a specific project in a single workspace
Secure and protect documents and document content
Increase workplace efficiency through integrated workflows
Provide paper-based, image-based and text-based comparison workflows to users

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