Automating Workflow & Software License Renewal

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Software Renewal Request 🎎

Docusign Workflow Automation

Problem

Problem: Process of accessing softwares from users

• Gather data from the departments to sign new licensing contracts with providers

Intended Impact

To improve efficiency and save cost of the original process of software renewal

Original Workflow

1) LSIT requests Dept managers fill out spreadsheet with all license requests for their Dept

TIME: Department managers total up the requests within their Dept and updates the sheet

2) Department managers submits the sheets to LSIT.

TIME: At the end of the term, LIST combines and sums up all license count in all departments

3) LSIT use the information to sign new contract lease with software providers.

Improved Workflow Emails sent to requester: User submits

signaling request received **Request Form** and to their financial to LSIT manager



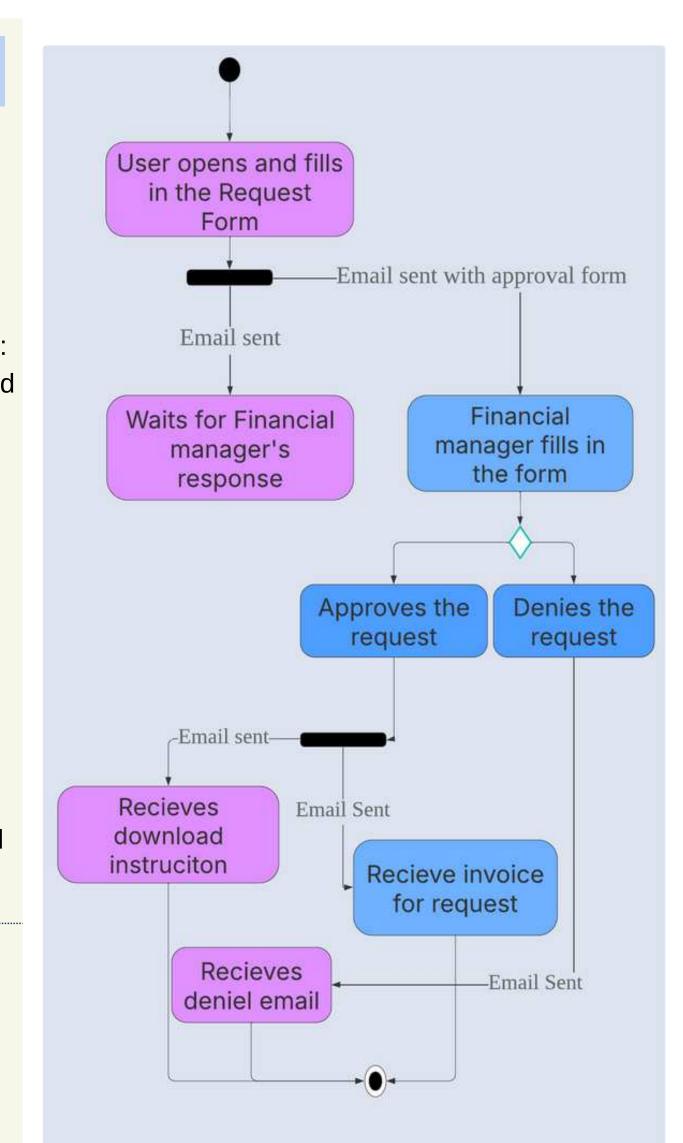


The financial manager Automatic email sent fills in an Approval out for Form to approve or decline the request.

approval/rejection to financial manager and requester



User information stored and accessed in secured spreadsheet to keep record



Problem

Author Access

- Users must send ticket to request Docusign author permissions
- Staff member needs to **manually** verify completion of trainings
- Lots of waiting time

Agreement Sending

- Users submit license requests
- Managers need to manually find and send agreements meeting requested conditions
- Back and forth process

Solution

Author Access

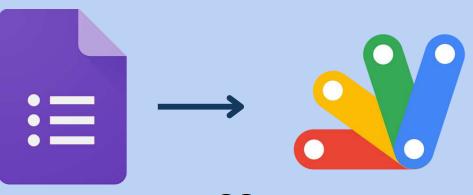
- Create an easily accessible form
- Form can be integrated with automations that check proof of completed trainings
- Will immediately update user permissions

Agreement Sending

- Integrate automations into original form that users request licenses with
- Finds corresponding templates and requests signatures without manager input

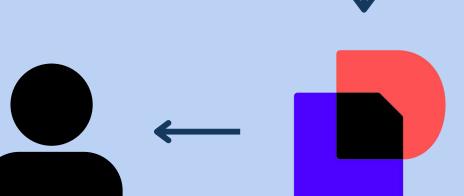
Process

Both workflows function similarly, by integrating Google Forms with Docusign functionality. Google Apps Script (GS) was used to connect to the Docusign API and take the required actions



Google form submitted

GS parses responses for necessary information



User receives permissions / gets document to sign

Call Docusign API to update user permissions / find and fill out the correct templates to send to users

User Management

Problem: Process of organising and finalising costs for financial departments Goal: To improve efficiency and save cost of the original process of financial distribution

Process:



Spreadsheet categorised by year with information



Create folder tree from year, software type, and department.



Create the user spreadsheet, docs invoice, and pdf invoice within each department folder

Continuous Process Improvement

Updating previous automations

- Migration of the Box export and Box transfer codes to new API endpoints
- Box export and Box transfer are programs the previous intern, Edwin, wrote to automate the user management process for Admin.

Box Automation box





Problem: Creating a secure way to distribute software licenses to users



Leverage Google Apps Script throughout



Form











Request for Retrieve relevant license sent licensing keys through Google from secure sheet password locked txt

Use Box API to create temporary file w/ keys

Temporary share file and password emailed to user Box Relay deletes file after 24 hours