

Automating Workflow & Software License Renewal

UC SANTA BARBARA
Information Technology

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Software Renewal Request

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.

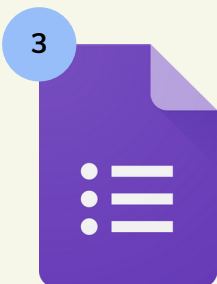
Improved Workflow



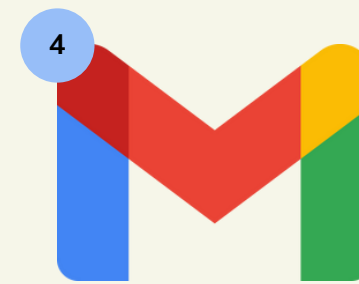
1
User submits Request Form to LSIT



2
Emails sent to requester: signaling request received and to their financial manager



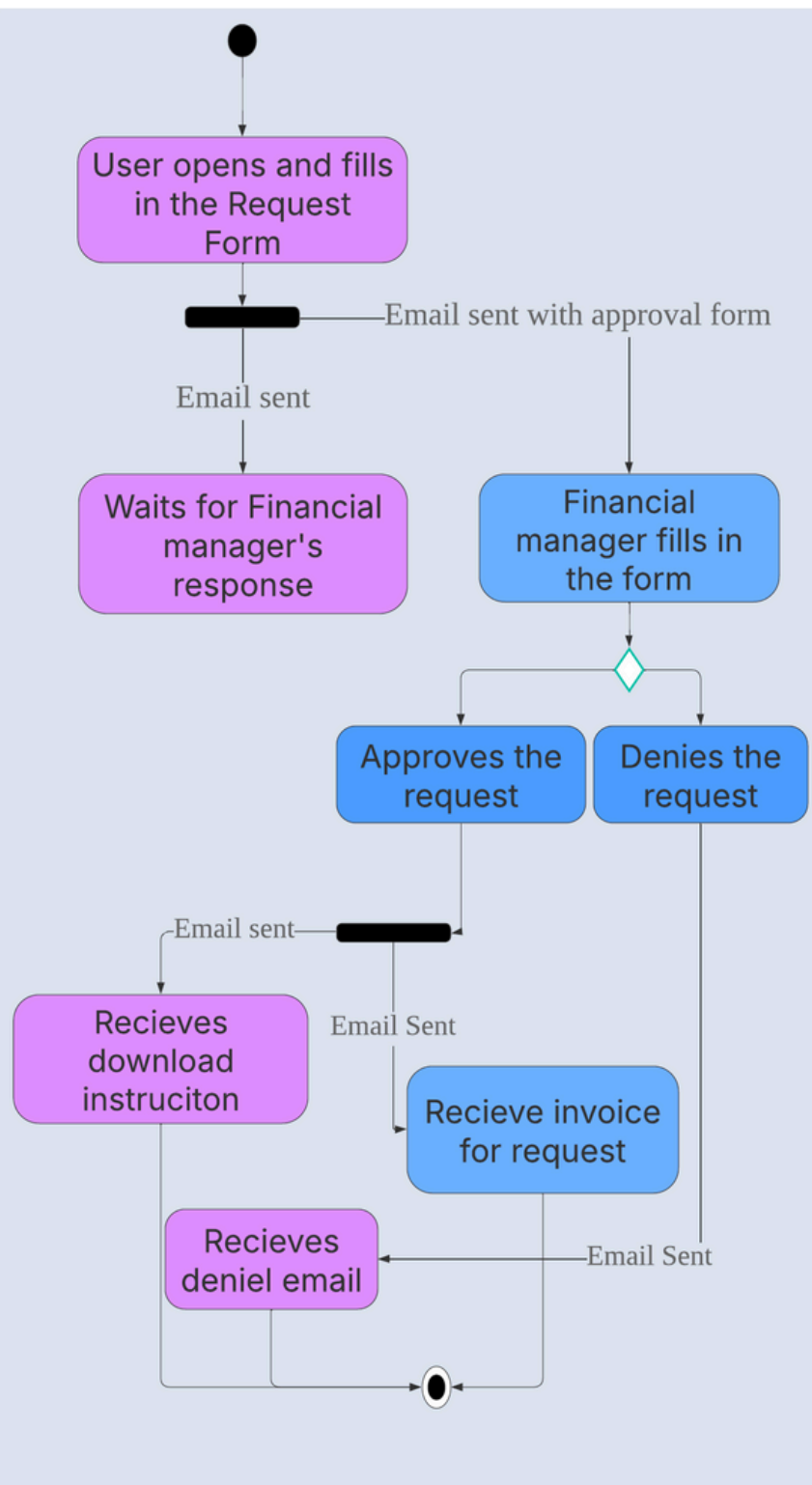
3
The financial manager fills in an Approval Form to approve or decline the request.



4
Automatic email sent out for approval/rejection to financial manager and requester



User information stored and accessed in secured spreadsheet to keep record



Docusign Workflow Automation

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

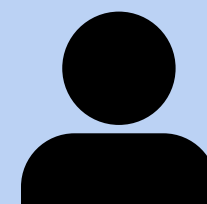
Both workflows function similarly, by integrating Google Forms with Docusign functionality. Google Apps Script (GS) was used to connect to the Docusign API and take the required actions



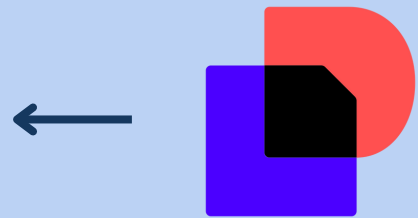
Google form submitted



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

Box Automation

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.

Improving IT Security Practices

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



Leverage Google Apps Script throughout



Request for license sent through Google Form



Retrieve relevant licensing keys from secure sheet



Use Box API to create temporary password locked txt file w/ keys



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