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Integrating DocuSign into the Permissions Workflow

Amy D. Coughenour
Concordia University - Portland, acoughenour@cu-portland.edu

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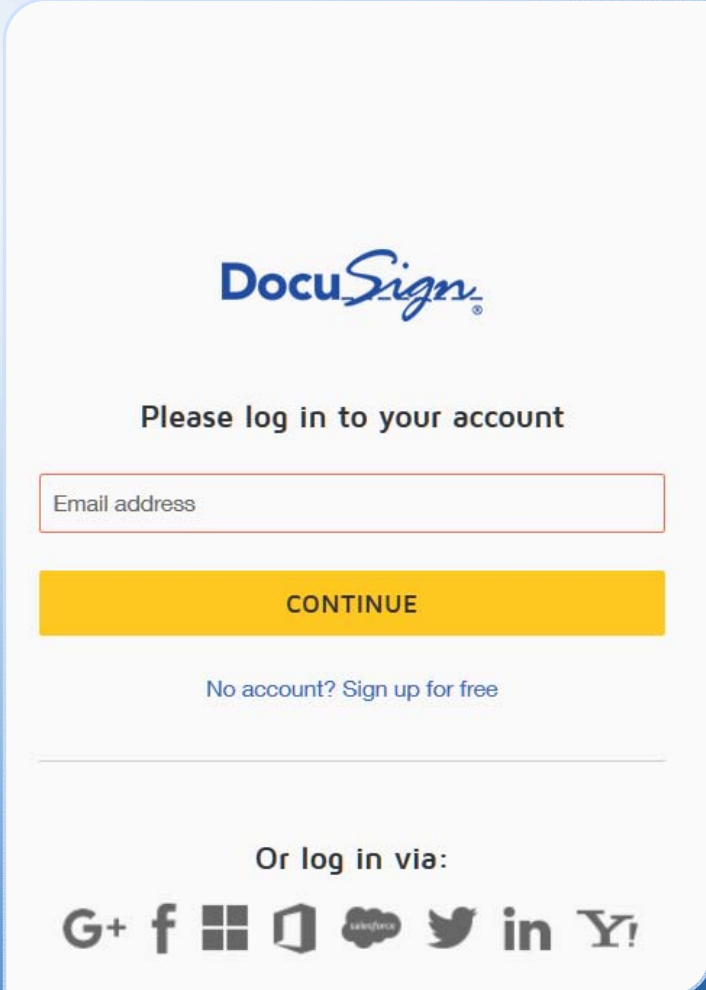
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INTEGRATING DOCUSIGN INTO THE PERMISSIONS WORKFLOW

Amy Coughenour
Concordia University – Portland

Background:

- University DocuSign access for financial aid and student services
- Request from IT – protect PII; paperless documentation, preservation
- Two library accounts – primary and backup



The image shows a screenshot of the DocuSign login interface. At the top is the DocuSign logo. Below it is the text "Please log in to your account". There is a text input field labeled "Email address". Below the input field is a yellow button labeled "CONTINUE". Underneath the button is a link that says "No account? Sign up for free". At the bottom, there is a section titled "Or log in via:" followed by icons for Google+, Facebook, Microsoft, OneDrive, Salesforce, Twitter, LinkedIn, and YouTube.

INTEGRATING DOCUSIGN INTO THE PERMISSIONS WORKFLOW

Collaboration & Communication

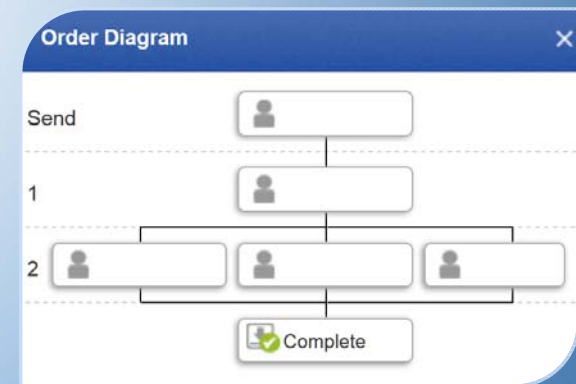
The Promethean
CU Commons Permission Form

PERMISSION FOR ELECTRONIC PUBLICATION

Name (First Middle Last)
Title of the Submission

I hereby certify that, if appropriate, I have obtained permission from the owner(s) of each third party copyrighted matter to be included in my submission, allowing distribution as specified below.

Role	Email	Name
Contributor	Email	Name
Librarian		
Promethean Far		
Promethean Suj		
Signing Role (re	Email	Name
Signing Role (re	Email	Name
Signing Role (re	Email	Name
Signing Role (re	Email	Name



DESIGN & PHRASING

- Adjust forms to fit collection needs
- Branding, fields, type of work

CONTACT INFORMATION

- Receive author contact info (names, email)
- Program managers, admin assistants, etc.

ROUTING FORMS

- Include collection contacts in routing of the completed form

INTEGRATING DOCUSIGN INTO THE PERMISSIONS WORKFLOW

Envelopes & Templates

- Introduction; explain request
- Set default settings
- Use fillable PDF or set up fields
- Set order, required fields (pre-fill)

The screenshot displays the DocuSign interface for creating a signing envelope. On the left, the 'Template Summary' section shows details for a template named 'SURI Permission Form'. Below this, the 'Documents for Signature' section lists a document 'SURI_electronic_permission.pdf' with 1 page. The 'Email Message' section contains a pre-filled subject line and a personalized message body. On the right, the 'Roles' section identifies the recipient as 'Student/Alumni []: Amy Coughenour'. The main preview area shows the 'CU Commons Permission Form' with the Concordia University logo and the title 'Student Undergraduate Research Institute'. The form includes a header 'PERMISSION FOR ELECTRONIC PUBLICATION' and several input fields: 'Name (First Middle Last) [as you want it presented]', 'Title of the Work', 'Type of Work' (with radio buttons for paper, poster, and presentation), 'Year of Completion', 'Department', and 'Faculty Supervisor'. A signature line at the bottom reads: 'I hereby certify that, if appropriate, I have obtained permission from the owner(s) of each third party copyrighted matter to be included in my work, allowing distribution as specified below.'

INTEGRATING DOCUSIGN INTO THE PERMISSIONS WORKFLOW

Settings

- Reminders: first reminder & successive
- Expiration date; warning
- Set up default settings
- Adjust after send (update email)

Envelope Settings

Recipient Information

- Allow recipient(s) to change signing responsibility.

Reminders and Expirations

Envelope will expire on 9/11/2017.

Signer will be warned of expiration on 9/4/2017

Signer will be reminded on 7/18/2017.

Then, every 5 days after that.

- Reminders Enabled

Send a reminder email to the signer in day(s).

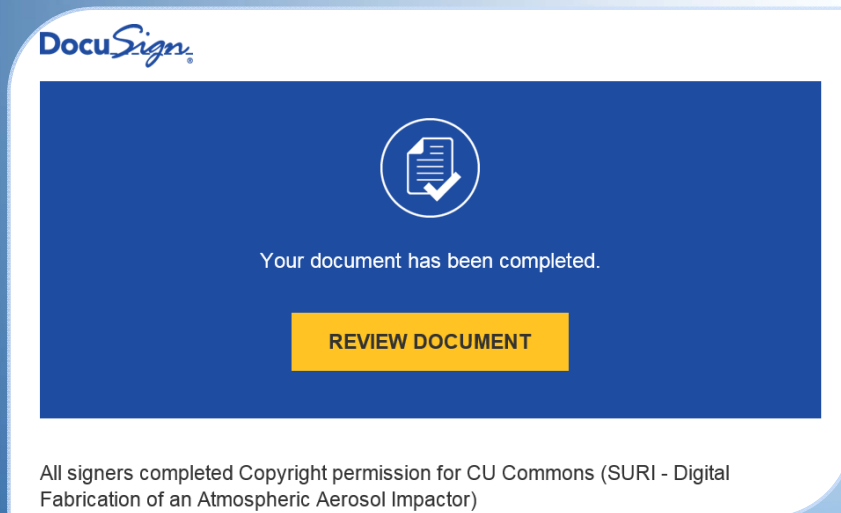
After the first reminder, send a reminder every day(s).

Expire envelope in day(s).

Warn signer of envelope expiration day(s) before it will expire.

INTEGRATING DOCUSIGN INTO THE PERMISSIONS WORKFLOW

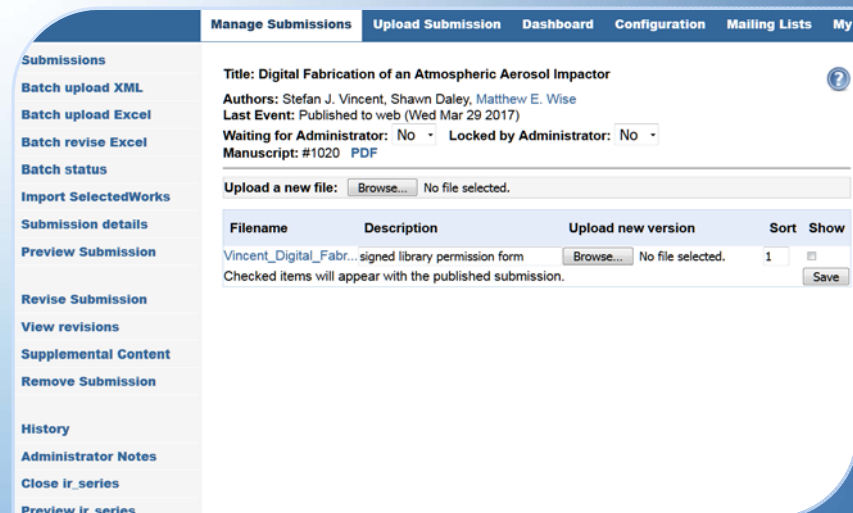
Processing for the IR



All signers completed Copyright permission for CU Commons (SURI - Digital Fabrication of an Atmospheric Aerosol Impactor)

DOCUSIGN PROCESSES

- Receive notification email
 - when signer views request
 - when signer completes form
- Download PDF to network (backup)



DIGITAL COMMONS PROCESSES

- Confirm access type from permission form matches submission selection
- Upload PDF > Supplemental Content
- Suppress (uncheck box)