

WHITE PAPER

# IseoSign for DocuSign

Just sign faster! New automated ways of  
working with DocuSign.

iseo  
SOLUTIONS

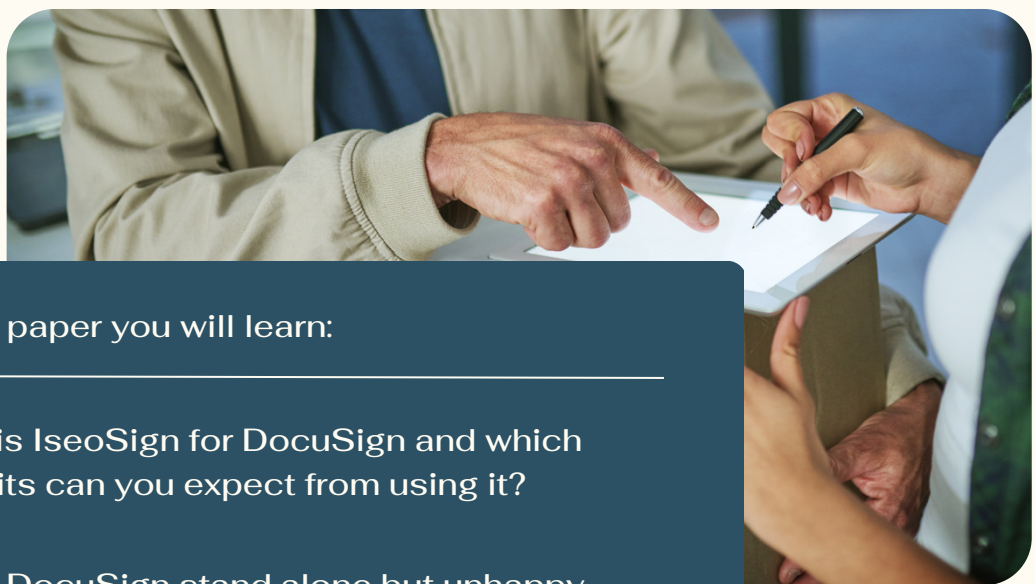
in collaboration with

kweli

# IseoSign for DocuSign

In today's fast-paced business world, time is of the essence. With digital transformation and remote work becoming the norm, companies are looking for ways to streamline their operations and reduce the time and effort needed for document signing. This is where e-signature solutions like DocuSign come into play.

DocuSign is a popular e-signature solution that enables users to sign and send documents electronically, reducing the need for physical signatures and paperwork. However, as with any software, there are limitations to what DocuSign can offer. This is where IseoSign, an extension (integration) for DocuSign, comes in.



In this white paper you will learn:

- 1 What is IseoSign for DocuSign and which benefits can you expect from using it?
- 2 Using DocuSign stand alone but unhappy with limitations to what it can offer?
- 3 Using OpenText Content Server but remain unconvinced even after trying the standard DocuSign integration?

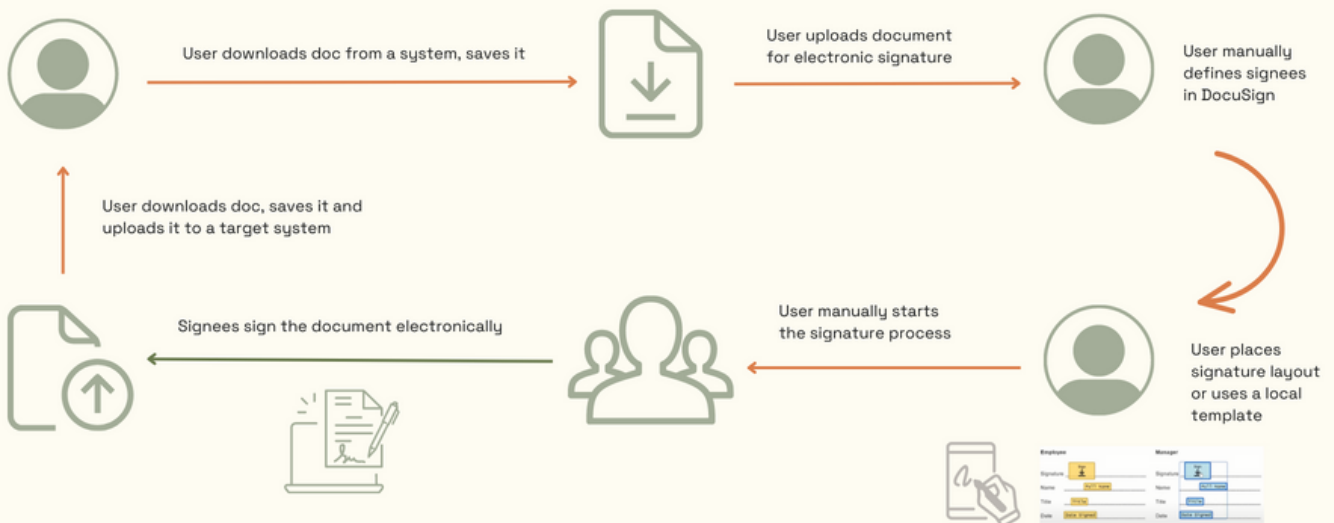
## Bottleneck of Standalone DocuSign use.

A DocuSign standalone User must:

- first download a document from another system manually, then save and upload the document to DocuSign
- specify signees manually even if the information is available in the system (user ID, attribute)
- set the signature and other fields manually (or use a local template);
- start the signature process manually
- download the signed document, save it and upload it to the target system

## DocuSign stand-alone

### DocuSign

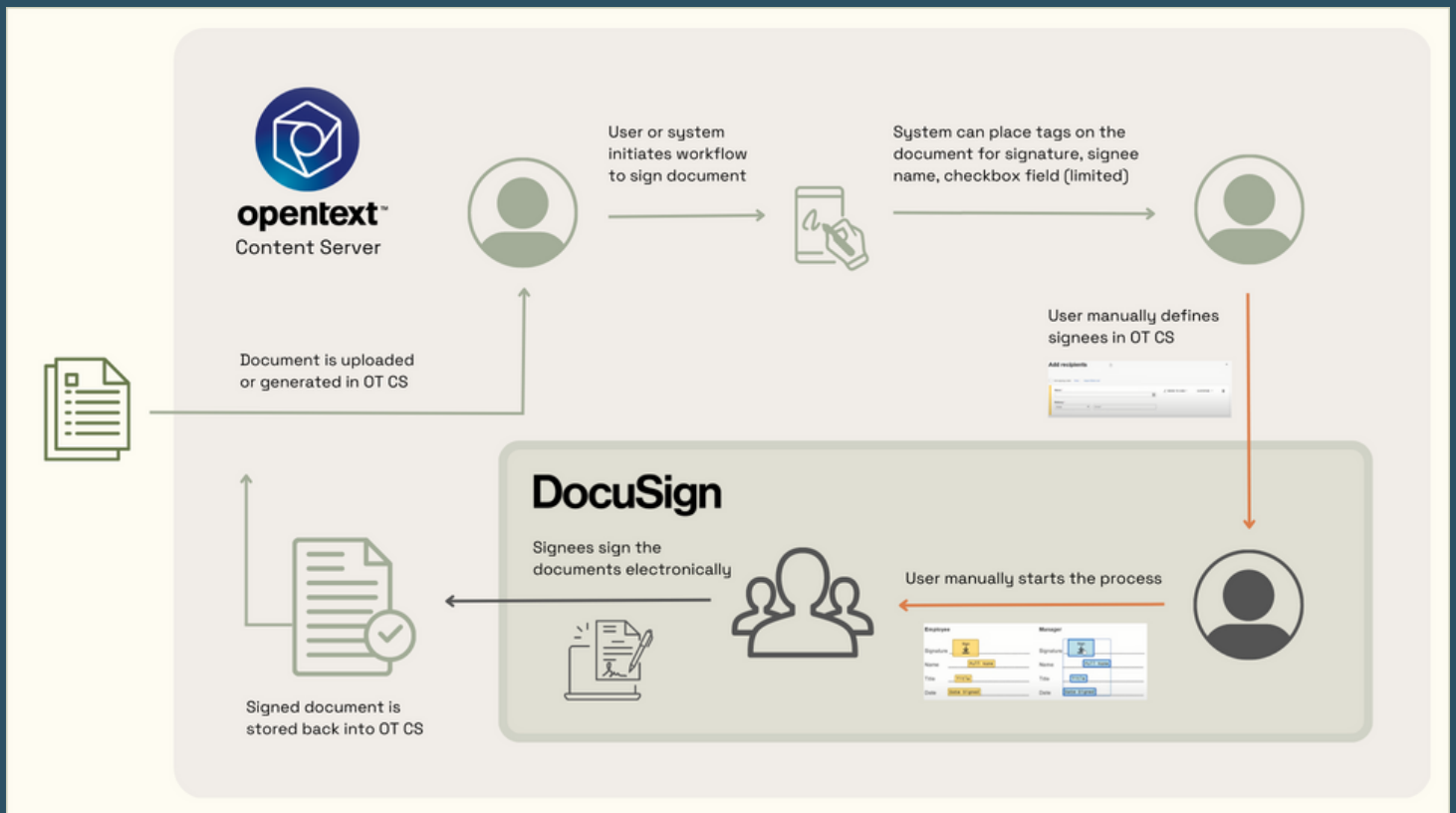


## Bottlenecks of the standard Open Text Content Server to DocuSign integration.

If you already use OpenText Content Server and its standard DocuSign interface, you might have already faced the bottlenecks of the process which dramatically decrease the usability:

- The User is required to set the signees manually – even if the information is available in OpenText Content Server
- The User is required to manually start the process inside DocuSign again
- The User can not manage templates from OpenText Content Server – i.e. the user must place signature and other fields manually in DocuSign
- The integration is not suitable for forms, filling information from OpenText Content Server into text placeholders and other complex scenarios

## OpenText Content Server standard integration with DocuSign



## IseoSign for DocuSign

With IseoSign for DocuSign you:



### Completely automate the starting process on DocuSign side.

If signee name and email address are known to OT CS (internal user field or synced from an external business application), the system transfers this information to DocuSign completely in the background



### Eliminate the manual user start step in DocuSign – the process is initiated completely in the background



### Your process can be way more sophisticated:

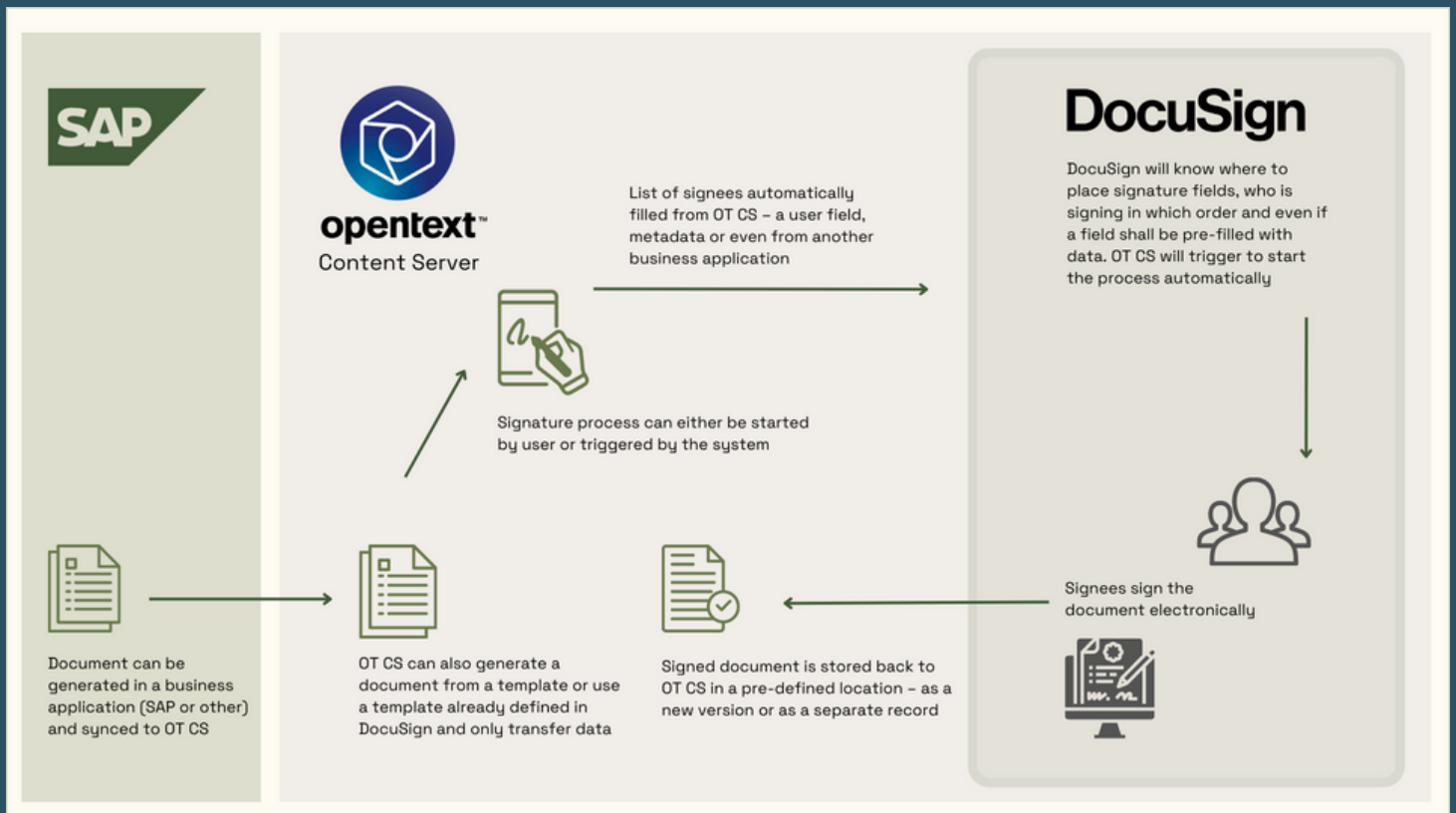
- You can trigger your signature process start from an attribute in OT CS, like the status on the document
- You can generate a document automatically based on a trigger, like the status change inside OT CS (or from another external business application\*)
- You can sync a document generated in an external business application and trigger the signature process
- You can automatically pre-fill the document with information from OT CS resp. from your business application\*, like customer or supplier name, address, contract details, payment terms etc.
- You can use an electronic forms process: from approval of a form template in OT CS, pre-fill form fields with data or have it pre-defined to be filled out by a specific signee in a sequence. The system will recognize the fields layout, start the signature process and store the signed form back to OT CS in a pre-defined location. When a new template form is approved it gets automatically updated in DocuSign

## Basic system requirements

- OT CS from version 20.2
- WF Extensions
- WebReports
- DocuSign account (standard or GxP module)






















- Optional and depending on scenario
- Rendering server (Blazon or AdLib)
  - xECM license for SAP
  - integration into other business applications

## IseoSign for DocuSign and OpenText Content Server integration





## Comparison

Functions	Stand-alone DocuSign	Standard DocuSign OT CS	IseoSign for DocuSign
Automatic signee determination			
Background start in DocuSign			
Automatic place of signature fields (with template)			
Automatic filling of fields with data from OT CS			
Eliminate up- and download of documents			
Automatic centralized storage of signed documents			
Integrate template approval process inside OT CS to DocuSign allowing the use of the most recent document template			

## IseoSign for DocuSign – direct cost savings

Complete background process possible

Eliminate manual steps

Increase usability

Increases speed of the overall process



cost saving

### Example with standard OT-DocuSign integration:

For approx. 5 000 documents sent for approval per year

- Manual steps take between 4 and 10 minutes
- Min saved time =  $5\,000 * 4 = 20\,000$  minutes or 333 hours of work
- Max saved time =  $5\,000 * 10 = 50\,000$  minutes or 833 hours of work

### Example for a stand-alone DocuSign solution:

In addition to the above time for finding the right document, saving it, uploading & then download and saving back to the target system between 3 and 5 mins added:

- Min saved time =  $5\,000 * (4 + 3) = 35\,000$  minutes or 583 hours of work
- Max saved time =  $5\,000 * (10 + 5) = 75\,000$  minutes or 1 250 hours of work



## ABOUT ISEOSOLUTIONS

We specialize in Enterprise Information Management solutions for collaboration, document management, archiving and the optimization of document-centric business processes from the first idea to the replacement / migration of an application.

We focus on customers and prospects in Switzerland and abroad targeting small, medium and large companies with SAP®, OpenText® and Microsoft® as strategic IT suppliers.

## CONTACT US



Joachim Freitag,  
Managing Partner IseoSolutions  
+41 78 648 97 33  
[contact@iseosolutions.ch](mailto:contact@iseosolutions.ch)