

## Efficiently Manage DocuSign Across Complex Organizations

As organizations adopt DocuSign across departments, geographies and lines of business, their administrative challenges grow. Admins need the right tools to manage disparate accounts, delegate authority and empower teams—all while adhering to corporate policies.

### DocuSign Organization Management

Org Management helps administrators centrally manage DocuSign across the enterprise—even across accounts, domains and data centers around the globe. It lets you compare settings across accounts, modify settings in bulk, and efficiently add, update or close a large number of user accounts at once.

Org Management helps administrators:

- Establish oversight for all corporate accounts
- Create delegated administrators
- Aggregate reporting across accounts
- Manage users throughout the organization
- Centrally manage account settings
- Create a custom search experience
- Perform bulk actions
- Transfer envelopes

As corporate structures evolve, administrators need effective tools to actively manage their organization without giving away the keys to the kingdom. The ability to establish and maintain control over security settings across the organization can help ensure compliance with corporate policies and regulatory requirements. Admins can also utilize search enhancements to help users in their organization quickly and securely find the agreements they need to do their job.

Activity	Type	Summary	Administrator	Timestamp	Status	Actions
Export	External Domain Users	362 users exported	Dagna Polson	1/26/2021   5:12:44 pm	<span>Processed successfully</span>	<button>VIEW</button>
Import	Add new users	1 user added	Christa Louka	1/11/2021   12:59:21 pm	<span>Processed successfully</span>	<button>VIEW</button>
Export	Users and Memberships	478 users exported	Christa Louka	1/11/2021   12:52:20 pm	<span>Processed successfully</span>	<button>VIEW</button>
Export	Users and Memberships	475 users exported	Rachel Mosakowski	1/14/2021   3:42:50 pm	<span>Processed successfully</span>	<button>VIEW</button>

Centrally manage users throughout your organization.

Category	Setting	ACME Mortgage Brokers	Tally Communications
Comments	Allow senders to override comments	true	true
Comments	Include comment text in email notifications when a comment is posted	true	true
Comments	Enable comments in envelopes sent from this account	true	false
Connected Apps	OneDrive	false	false
Connected Apps	Salesforce	true	true
Connected Apps	Google Drive	false	false
Connected Apps	Box	false	false
Connected Apps	Dropbox	false	false
Email Preferences	[Signed] Only comments that mention me or are private to me	true	true
Email Preferences	A comment is posted in an envelope that's been sent to me	true	true
Email Preferences	An envelope is sent to a signing group to which I belong	true	true

Compare settings across accounts.

## Organization Management enables admins to:

### Define roles and responsibilities

Designate users as delegated admins, to perform specific tasks such as managing organization-wide account settings or users.

### Save time with bulk-actions

Update a large number of accounts or memberships by exporting and importing bulk user and account settings.

### Securely manage envelope ownership

Transfer envelopes within your organization to comply with data retention policies and keep track of your agreements.

### Audit account settings

View and compare settings across multiple accounts to standardize operations and enhance compliance across your organization.

### Help users find agreements quickly and securely

Create a custom search experience using advanced filters based on agreement field data, in addition to envelope metadata—and control which agreements are discoverable by specific groups.

### Aggregate reports

View envelope and account analytics across your organization with centralized organization reporting tools.

## Two ways to get Org Management:

1/ Upgrade to DocuSign Enterprise Pro

2/ Purchase Org Management as a separate add-on

Bulk Actions						
ACTIONS		ACTIVITY				
Activity	Type	Summary	Administrator	Timestamp	Status	Actions
Export	External Domain Users	In Progress	Umar Asad	2/9/2021   9:52:01 am	<span style="color: #808080;">In Progress</span>	<span style="color: #808080;">VIEW</span>
Export	Account Settings	12 accounts exported	Umar Asad	2/9/2021   9:51:45 am	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Users and Memberships	483 users exported	Umar Asad	2/9/2021   9:51:45 am	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Account Activity Report	12 accounts exported	Umar Asad	2/9/2021   9:51:36 am	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Account Settings	12 accounts exported	Svetra Ganesh	2/9/2021   9:38:38 pm	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	External Domain Users	362 users exported	Danya Pustein	1/26/2021   8:12:44 pm	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/13/2021   9:51:45 am	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	User Activity Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   3:08:09 pm	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   3:08:07 pm	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   2:52:10 pm	<span style="color: green;">Processed successfully</span>	<span style="color: green;">VIEW</span>

Bulk-update accounts or memberships.

Name	Email	Permission Profile	Status	Action
Rebecca Denman	rebecca.denman@docsigndemo.com	Product Reports Administrator	Active	ACTIONS
Aline Lemos		Delegated - Manage account activity reporting	Active	ACTIONS
Alwyn		Delegated - Manage account alert reporting	Active	ACTIONS
Armando Marie Serrao		Settings Administrator	Active	ACTIONS
Armondo Serrao		Delegated - Manage organization account settings	Active	ACTIONS
Amy Associate		Users Administrator	Active	ACTIONS
Amy Silverman		Delegated - Manages organization users	Active	ACTIONS
Andrea Hahn			Active	ACTIONS
Angela Adams	angela.adams@summitdemo.org		Administrator	ACTIONS
Angie Peng	angie.peng@docsigndemo.com		Administrator	ACTIONS

Add delegated administrators.

## Ready for the next step?

Talk to your DocuSign Sales representative about a demo of DocuSign Organization Management.

### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 750,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

### DocuSign, Inc.

221 Main Street, Suite 1550  
San Francisco, CA 94105

[docusign.com](http://docusign.com)

### For more information

[sales@docusign.com](mailto:sales@docusign.com)  
+1-877-720-2040