

# 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.

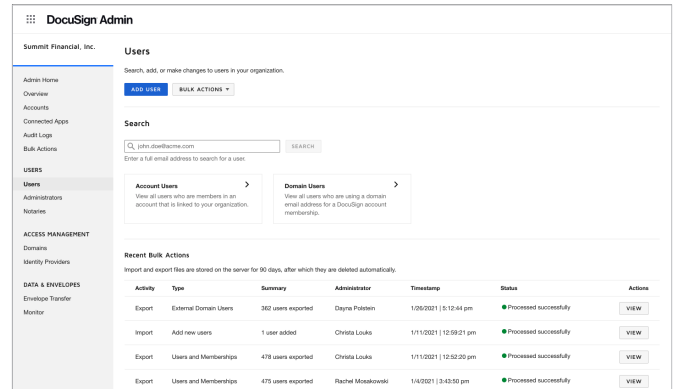
## DocuSign Organization Management

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.

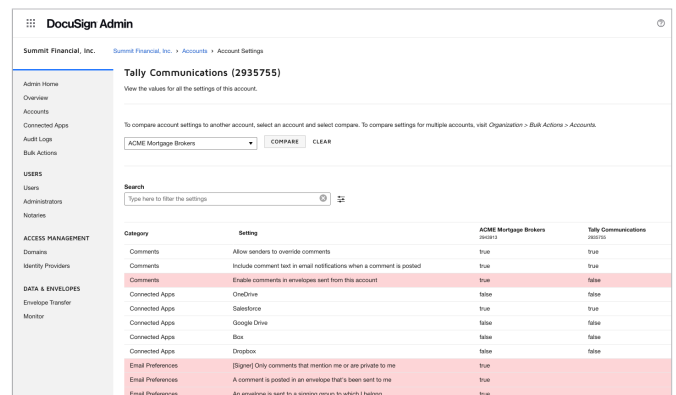
Org Management helps administrators:

- 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.



Centrally manage users throughout your organization.



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.

**DocuSign Admin**  
Summit Financial, Inc.

**Bulk Actions**  
Manage key areas of your organization through bulk actions. Track all bulk actions through the activity log. Import and Export files are available in the activity log for 90 days, after which they are deleted automatically. For more information, see "Bulk Actions" in the DocuSign Admin Guide. Import and Export files are stored on the server for 90 days.

Activity	Type	Summary	Administrator	Timestamp	Status	Actions
Export	External Domain Users	9 In Progress	Umar Azad	3/9/2021   9:52:01 am	In Progress	
Export	Account Settings	12 accounts exported	Umar Azad	2/9/2021   9:51:54 am	Processed successfully	VIEW
Export	Users and Memberships	483 users exported	Umar Azad	2/9/2021   9:51:44 am	Processed successfully	VIEW
Export	Account Activity Report	12 accounts exported	Umar Azad	2/9/2021   9:51:36 am	Processed successfully	VIEW
Export	Account Settings	12 accounts exported	Swetha Ganesan	2/2/2021   1:39:38 pm	Processed successfully	VIEW
Export	External Domain Users	362 users exported	Danya Polstein	1/26/2021   5:12:44 pm	Processed successfully	VIEW
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/13/2021   9:51:08 am	Processed successfully	VIEW
Export	User Activity Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   3:08:38 pm	Processed successfully	VIEW
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   3:03:07 pm	Processed successfully	VIEW
Export	Envelope Volume Report	12 accounts exported	Jeremy Cooperworth	1/12/2021   2:52:19 pm	Processed successfully	VIEW

Bulk-update accounts or memberships.

**DocuSign Admin**  
Summit Financial, Inc.

**Administrators**

Filtered by: Status: active, pending

**Add Administrator**

Add a DocuSign user as an administrator for your organization. Select one of the permission profiles to specify the level of access to grant to this user. The user will receive an email invitation to complete their administrator membership.

Name:

Email:

Permission Profile:

- Administrator
- Product Reports Administrator
- Full organization management capabilities
- Delegate - Manages account activity reporting
- Security Reports Administrator
- Delegate - Manages account user reporting
- Settings Administrator
- Delegate - manages organization account settings
- Users Administrator
- Delegate - manages organization users

Name	Email	Status	Actions
Alice Lemos		Active	ACTIONS
Ashyn		Active	ACTIONS
Amranda Marie Selner		Active	ACTIONS
Amranda Selner		Active	ACTIONS
Amranda Selner		Active	ACTIONS
Amy Associate		Active	ACTIONS
Amy Skewman		Active	ACTIONS
Andrew Hahn		Active	ACTIONS
Angela Adams	angela.adams@summitdemo.org	Active	ACTIONS
Angie Pang	angie.pang@docuign.com	Active	ACTIONS

Add delegated administrators.

## Two ways to get Org Management:

- 1/ Upgrade to DocuSign Enterprise Pro
- 2/ Purchase Org Management as a separate add-on

## 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.