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.
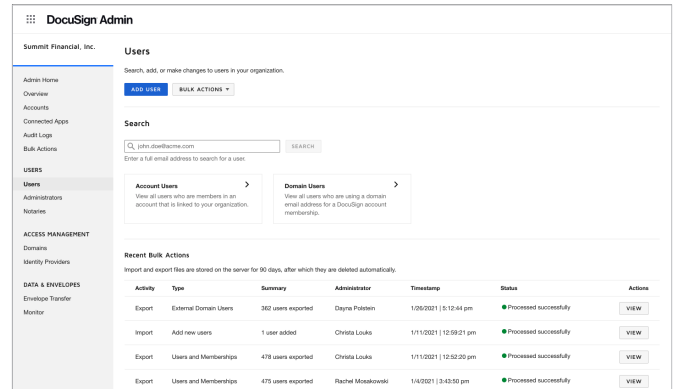
DocuSign Organization Management

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.
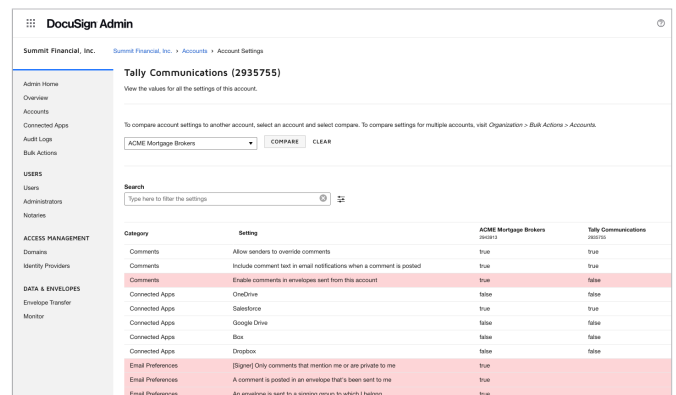
Org Management helps administrators:

– 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.

Two ways to get Org Management:

1/ **Upgrade** to DocuSign Enterprise Pro

2/ **Purchase** Org Management as a separate add-on

Bulk-update accounts or memberships.

Add delegated administrators.

Ready for the next step?

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

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