

Managing and storing documents

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MANAGING DOCUMENTS

How will I know when there is a document that I need to sign?

If someone has requested that you sign a certain document, you will receive an email notification via DocuSign with a link embedded in the email, which will direct you through the signing process for that document. You can also find out if you have any documents awaiting your signature from your DocuSign home screen - in the top left corner, you will see the Envelope Status window. Within that, you will see the **'Awaiting my signature'** category with a number next to it, showing how many documents are in your queue. If you click on the words **'Awaiting my signature,'** you will be directed to the folder containing those documents so that you can go ahead and sign them.



Can I create folders to sort my DocuSign documents?

Yes. You can create folders to organize your DocuSign envelopes (the documents and signing progress) within your inbox, sent, deleted, templates and, shared templates folders. Click 'add folder' above the section where you would like to insert the new subfolder and then you will see a new folder named 'New Folder.' Double-click on it to rename it and then drag and drop files into it.

STORING DOCUMENTS

Where will my signed documents be stored?

The signed documents are known as Completed Documents in DocuSign; they are

automatically stored in the Completed folder within the DocuSign application. On your DocuSign homepage, you will see a box titled Envelope Status in the top left corner. Toward the bottom of the box, you'll see ?Completed.? Click on that to go to a folder of all your completed documents. You can also access that directory by clicking on the ?**Manage?** tab at the top of your screen.

You can also sync your DocuSign files with your Box account. See [here](#) [1] for more information on setting that up.

How can I download the signed file to my computer?

Find the document in your ?Completed? folder. Double click on it and then press the Download button above the document on the screen. That will open a window asking whether you would like to download the combined document or an archive of all documents. The combined documents will open a PDF file version of your documents. You can view and save the PDF from this window. The archive of all documents will save your documents and all of its workflow certification as a zip file. Follow the download instructions for your browser.

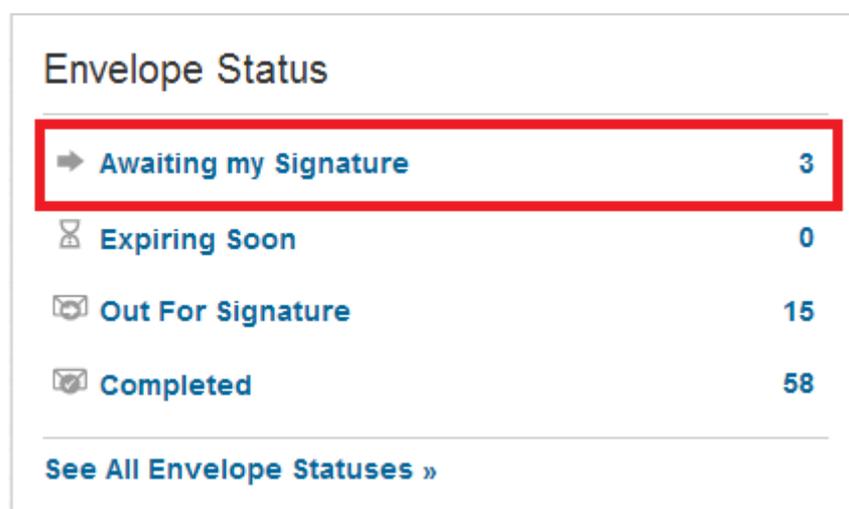
How can I give a coworker the ability to see my DocuSign folders?

It may be useful to allow others on your team to have shared access to your DocuSign inbox, sent folder, and any other folders, particularly if they may be covering for you when you're out of the office. When you grant someone access, know that they will have access to ALL of your DocuSign folders, though they cannot sign on your behalf. You may not want to do this if you have private documents there, such as your annual performance review. To authorize others to view your DocuSign folders, go here [2] and then select the DocuSign Request Form.

Required Service Information

Electronic Signature [3]

Images



Envelope Status	
➔ Awaiting my Signature	3
⌚ Expiring Soon	0
✉ Out For Signature	15
☑ Completed	58

[See All Envelope Statuses »](#)

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Source URL: <https://it.ucsf.edu/services/electronic-signature/additional/managing-and-storing-documents>

Links

[1] <https://wiki.library.ucsf.edu/display/DocuSign/DocuSign-Box+Integration>

[2] <https://ucsf.service-now.com/ess/applications.do>

[3] <https://it.ucsf.edu/services/electronic-signature>