How do I find documents from my area?

Tell Me How to Navigate to Your Area’s Documents

1. On the DocuSign homepage, click on the Manage tab, which is in the black bar at the top of the screen

   You can access the DocuSign homepage a few different ways.
   - The link on this page
   - The DocuSign portal which can be found on DoIT's webpage (https://doit.umbc.edu) under Business and e-Signatures (DocuSign)
   - On myUMBC under Topics followed by Staff Center. Under Administrative Systems click DocuSign.

2. Once on the Manage page, click on Shared Envelopes, which can be found in the gray menu on the left side of the screen
3. Select which area’s documents you would like to access
4. Your Inbox folder is where documents that have been sent to you for signing are housed

   Your Inbox and Action Required folders will probably be empty due to the fact that you are not being sent documents for signing through your area’s shared envelope. Envelopes that you need to sign will most likely only appear in your personal Inbox.

5. The Sent folder contains all documents that have been sent to recipients for signing. This is probably where you will find most documents.
6. The Deleted contains all of the documents that have been deleted. Documents in this folder will be permanently deleted after a period of time.
7. The Action Required contains all the documents that you need to fill out/sign/view.
8. Waiting for Others contains all of the envelopes that still need to be completed by recipients
9. Expiring Soon consists of envelopes that are about to expire
10. The Completed houses all envelopes in which all recipients have completed their requirements, thus a completed envelope
11. The Authentication Failed contains all envelopes in which a recipient’s authentication has failed

How to Search for a Document

1. Once on the DocuSign homepage, click on the Manage tab, which is in the black bar at the top of the screen
2. Click on Shared Envelopes, which can be found in the gray menu on the left side of the page
3. Select which area’s documents you would like to access
4. Navigate to which folder you would like to search in by using the gray menu on the left of the screen (a description of each folder in the menu can be found in the section above this)
5. Type the name of the document/what you are looking for into the search bar in the top right-hand corner of the page

   Most documents are titled using the same naming conventions, which makes it easy to search for specific documents. Document titles include who the document is for and what the document is. For example, if you wanted to search for a document that was for Jane Doe, you could just search the name and all documents filled out by Jane will be found. If you wanted to search for Leave Request documents, you would just search “Leave Request”.

6. Clicking the search bar makes more search options appear. If you know the status and date of what you are looking for, these options can help narrow down your search especially if you are not searching for one specific document.
7. Click Apply to search