

DocuSign - Generate Reports

Follow the steps below for instructions on how to generate reports in DocuSign.

The screenshot shows the DocuSign eSignature interface. At the top, there are navigation tabs: Home, Manage, and Reports. The Reports tab is highlighted with a red box and a circled '1'. Below the navigation is a search bar and a section titled 'Overview'. On the left side, there is a list of report categories: All, Envelope, Recipient, Usage, Custom, and Downloads. The 'Envelope' category is highlighted with a red box and a circled '2'. In the center of the page, there is an orange box containing two numbered steps:

1. Click the **Reports** tab in DocuSign
2. From the 3 report categories on the left, click the desired report folder.

TYPE	
All	15
Envelope	7
Recipient	2
Usage	5
Custom	1
Downloads	

DocuSign - Generate Reports

Search

Overview

TYPE

All 15

Envelope 7

Recipient 2

Usage 5

Custom 1

Downloads

Signing Insights

7 Reports

Name	Schedule
Envelope Report Information on your sent envelopes.	VIEW
Envelope Recipient Report Sender and recipient information on sent envelopes.	VIEW
Envelope Status Report Totals based on envelope status.	VIEW
Envelope Velocity Report Totals based on envelope completion time.	VIEW

3. Click the **VIEW** button next to the report you want to run

DocuSign - Generate Reports

DocuSign eSignature Home Manage Reports ?

Envelope Status Report

What are

Totals based on envelope status.

RUN REPORT SAVE AS

Month To Date 4 01/07/2022 — 01/13/2022 Time Zone: (UTC-07:00) Mountain Time (US & Canada) **EDIT FILTERS** **EDIT COLUMNS**

Status ▲	Total Envelopes	Unique Senders	Total Recipients	Total Signers	Total Files	Total Pag
----------	-----------------	----------------	------------------	---------------	-------------	-----------

5

RUN REPORT

Click RUN REPORT to view your report data.

4. Features you can use to customize the report are **Date Range, Edit Filters, and Edit Columns**

5. Click **Run Report** to generate the report

DocuSign - Generate Reports

Envelope Status Report

Totals based on envelope status.

Filtered by: Date (Month To Date), Envelope Status (Any), Sent (Any) | EDIT

RUN REPORT

SAVE AS

6

[What are my data limits?](#)

6. To save the report to your Custom report folder, click **Save As**

7. To download the report data, click the **Download CSV** button

7



Month To Date

01/01/2022

01/13/2022

Time Zone: (UTC-07:00) Mountain Time (US & Canada)

EDIT FILTERS

EDIT COLUMNS

Total Results: 2

Status ▲	Total Envelopes	Unique Senders	Total Recipients	Total Signers	Total Files	Total Pages
Sent	9	4	21	16	9	13
Completed	11	5	24	19	19	24