

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 main content area, 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	Count
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.	3 VIEW ▾
Envelope Velocity Report Totals based on envelope completion time.	VIEW ▾

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

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The screenshot shows the DocuSign eSignature interface. At the top, there are navigation links for Home, Manage, and Reports. The Reports section is active. Below the navigation, the page title is "Envelope Status Report". There are two buttons: "RUN REPORT" (highlighted in blue) and "SAVE AS". A red box highlights a section containing a date range dropdown set to "Month To Date", a date range from "01/07/2022" to "01/13/2022", a time zone setting of "(UTC-07:00) Mountain Time (US & Canada)", and buttons for "EDIT FILTERS" and "EDIT COLUMNS". A circled number "4" points to this red box. Below this is a table with columns: Status, Total Envelopes, Unique Senders, Total Recipients, Total Signers, Total Files, and Total Pages. A circled number "5" points to a "RUN REPORT" button. Below the button is the text "Click RUN REPORT to view your report data." A text box on the left contains the following instructions:

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

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Envelope Status Report

Totals based on envelope status.

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

RUN REPORT

SAVE AS

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[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

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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