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OTS
OFFICE OF TECHNOLOGY SERVICES

eSignature Admin Reporting Training

docusign

DocuSign Reporting

Report data is a key tool to understanding and improving your DocuSign usage.

64% Improved efficiency and productivity

56% Faster, more effective decision making

51% Driving better financial performance

Reporting Activities & Benefits

Identify bottlenecks and friction points.

Optimize to achieve higher completion rates.

Provide a better signing experience.

Reporting data is generated continuously.

Reports contain real-time data from document activity.

Create custom reports and schedule automatic reports.

Reports Page

DASHBOARDS

My dashboard

Administrator dashboard

REPORT TYPE

- All (16)
- Envelope (8)
- Recipient (2)
- Usage (6)
- Custom (0)

Downloads

All users can view their own sent envelope data.

Users with reporting permissions can view all account envelope data.

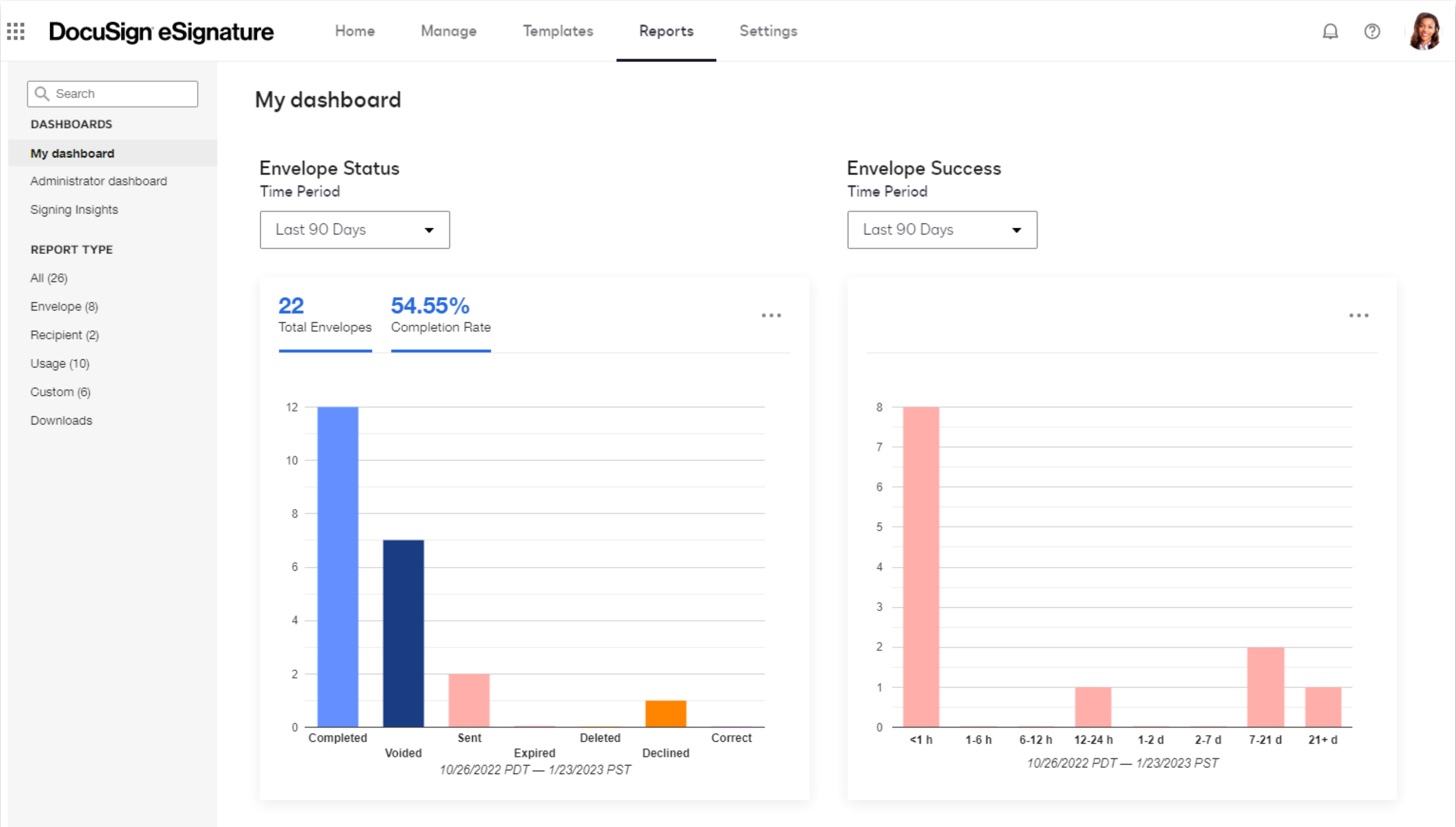
Standard Reports
Users can run reports to see information on their own account activity only.
Administrators and those users with reporting permissions can see all account-level activity.

Download links for the most recent reports delivered from your account.

My Dashboard

- This dashboard provides a look at key metrics on your sent envelope activity. Use this to quickly see:
    - Overall envelope status
    - Time to complete
    - Volume over time
- This dashboard is available to all users.

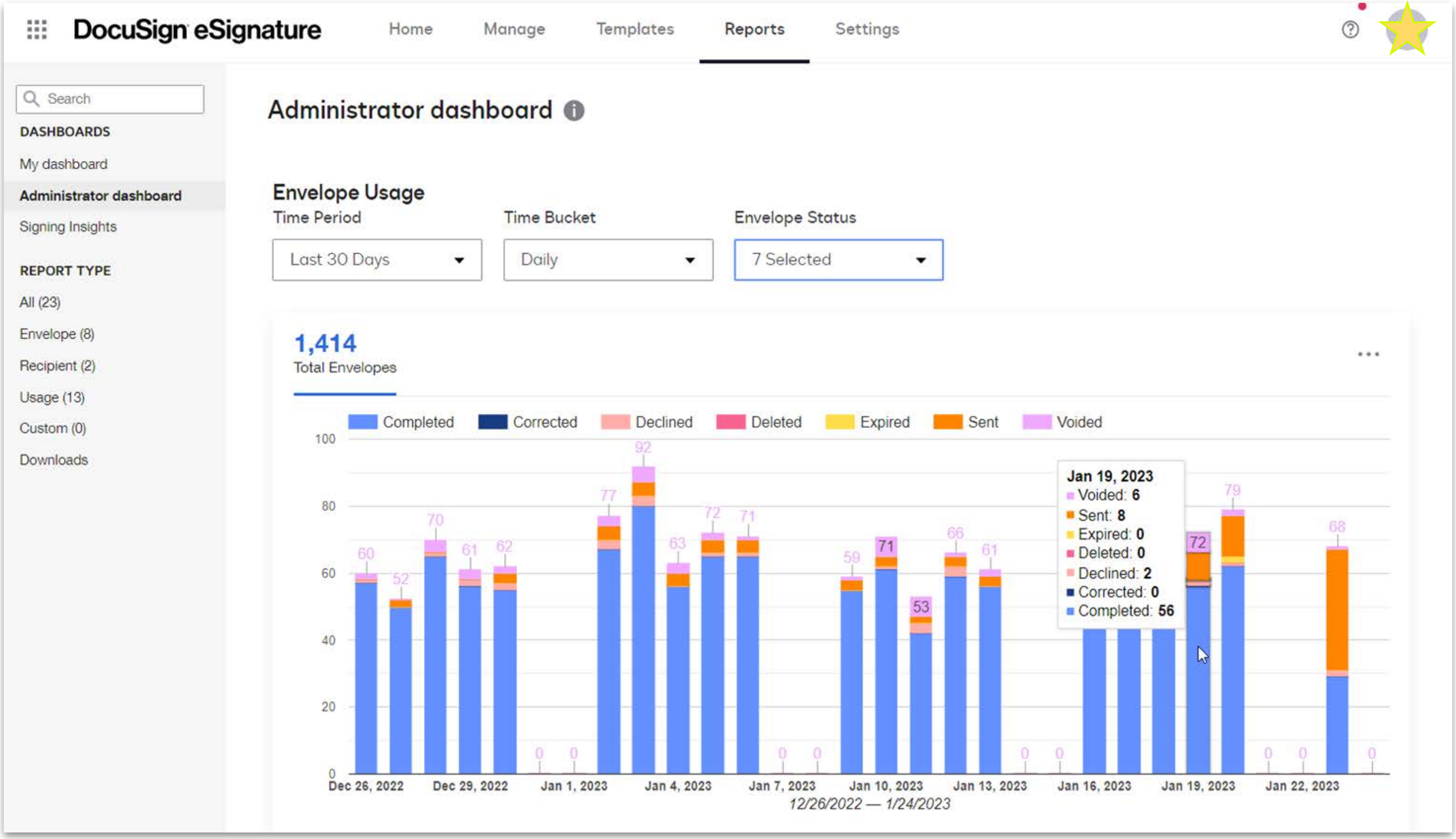
[My Dashboard User Guide]



Administrator Dashboard

- Provides a look at key metrics on the sent envelope activity across all the users within the account such as:
  - Overall envelope status
  - Time to complete
  - Volume over time for the envelopes sent
- This dashboard is available to administrators with full administrative access and delegated administrators with Reporting permission.

[Administrator Dashboard User Guide]



Standard reports

There are 3 categories of standard reports:

Envelope
Data on envelopes sent from the account.

Recipient
Data on recipient activity for envelopes sent from the account.

Usage
Data on activity and usage for the entire account.

Available to all users

Available to account administrators only

Reporting Demo

Reporting Considerations

- Reports DO display envelope metadata (data about the transaction), such as sender details, recipient details, dates and timestamps, envelope ID, status, last activity, volume, velocity, declined/voided reason, Envelope Custom Field values, IP addresses, etc.
- Reports DO NOT display document field-level data (aka “form data”).
  - Fields that you place on a document and assign to recipients are called ***Document Custom Fields*** and the data collected in these fields cannot be extracted via reports, nor are these searchable in Manage.
  - Envelope Custom Fields are a great solution to apply custom searchable data!
- Row limits to be aware of when generating reports:
  - View from within the DocuSign application: 5,000 rows
  - Download report: 50,000 rows
  - Scheduled report: 100,000 rows

View and Modify Reports

When you select a report to view from the Reports list and run it, the default report data is shown. From this default result set, you can modify the date range, filters, and columns displayed to deliver the information you want. [View full instructions here.]

Modify Report Criteria

Edit the report filters and columns to display the data you want.

Create a custom report

Save up to 100 modified reports to access them anytime you want.

Scheduling Reports

Set up a recurring schedule to automatically run reports.

Send reports via email

Use the Send Now feature to email a link to the report results.

Reporting Additional Resources

Learning Guides:

- Using Reports
- Administrator Dashboard
- View and Modify Reports
- Schedule, Send, or Download Reports

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