

Create Reports

1

- Click on the “Reports” tab



DocuSign eSignature Home Manage Templates Forms **Reports** Settings

SHARED ACCESS ▾

NEW ▾

Sent

Filtered by: Date (Last 6 Months) | [Edit](#)

2

- Click on the arrow next to “Envelope” on the treeview on the left-hand side of the page
- Click on “Envelope Report”

DASHBOARDS

My dashboard

Administrator dashboard

REPORT TYPE

▶ All (16)

▾ Envelope (8)

Envelope Report

Envelope Receipt Report

Envelope Status Report

Envelope Velocity Report

Envelope Volume Report

Envelope Authentication R...

Purged Envelope Report

Create Reports

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- Click on the “Run Report” button

Envelope Report

Information on envelopes sent from this account. [View Documentation](#)

Filtered by: Date (This Month), Envelope Date Type (Sent Date), Envelope Status (Any), and Sent By (Any)

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Date Range

From

To

This Month

11/01/2023

11/16/2023

Run report

Save As

4

- In the report screen, you can apply the following filters:
 - Date Range
 - Envelope date type

Date Range

From

To

Custom

11/01/2023

11/16/2023

Current Date

Envelope Date Type

Sent Date



Edit Filters



Edit Columns

Create Reports

*NOTE

- Click “Edit Filters” to filter by

- Envelope Status
- Job#
- Subcontractor

- Click “Done”

Envelope Date Type

Sent Date

Edit Filters

Edit Filters

Envelope Status

Any

Recipient Name Contains

Enter text here

Subject Contains

Enter text here

Envelope Custom Field Contains

Enter text here

Sent By:

Any

Specific Users

Specific Groups

Cancel

Done

- Click “Edit Columns” to check or uncheck filtered items

- Click “Done”

Envelope Date Type

Sent Date

Edit Filters

Edit Columns

Edit Columns

Search

9 columns selected

Envelope ID

Subject

Status

Sender Name

Recipient Name

Sent On

Last Activity

Cancel

Done

Create Reports

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- Use the clock icon on the right side of the screen to schedule the report to be emailed automatically
- Click “Done” when settings have been applied



Schedule Frequency

Daily

Interval (days)

Interval (days)

1

Every weekday (M-F)

Start Date (M/D/YYYY) End Date (M/D/YYYY)

11/17/2023

11/16/2024

Recipients

Send to me (jbooras@leekennedy.com)

Send to others

Attach CSV file to the email

Done

Cancel