Adobe Sign
REPORTS
Quick Reference Guide

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1.0 INTRODUCTION

Adobe Sign is an electronic form and signature application. It allows you to send electronic documents to recipients for signature. Additionally, you can take existing documents, make them fillable, and prepare them for electronic signatures.

1.1 About This Guide

This guide focuses on the Adobe Sign reporting functionality. It will walk you through the basic operations for working with reports. For information on Adobe Sign functionality, visit the Adobe Sign Resources page.

2.0 REPORTS OVERVIEW

You can create reports that contain various graphs showing the signature percentage and the average time to sign. You can export a CSV file with the raw data generated from the report or print a report.
3.0 CREATING REPORTS

To create a report,

1. From the Home page, click **Reports**

   ![Home Page with Reports Highlighted]

2. Click Create a new report

   ![Create a New Report Button]

3. For **Creation Date**, make a selection
   
   *This setting determines the timeframe from which to include data in your report*

   ![Creation Date Selection]

4. For **Workflows & Documents**, click **Filter by Document**

   *Allows you to select which documents you want included in your report*

5. On the **Filter by Document**,
   
   - Select the desired document(s) from the left
   - Click **Add Selected**

6. (Optional) In the **Document Name**, you can search for a document using the search operator and keywords

7. (Optional) Check **Include MegaSign Agreements**

   *This setting will include Mega Sign agreements in your report data*

8. For **Performance Goals**, leave the default settings

   *This setting allows you to adjust the visual results of your graphs and report*

9. For **Graph Agreements by**, check all that applies

10. For **Et Cetera**, leave the defaults

11. Click **Run Report**

    Your report opens. Click **Edit Settings** to make changes to your report.

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4.0 EDITING REPORTS

You can edit the settings for your report. To edit your report,

1. From the Home page, click Reports

2. Reports page opens showing your reports. Click the desired report

3. Click Edit Settings

4. Make your changes

5. Click Run Report

6. Click Save Report

7. You can either save the report as a different report or update an existing report with your changes.

8. To save the report as a different report.
   - In the box, give the report a name
   - Click Save Report
9. To update an existing report with your changes, click **Update report with current data**

5.0 SHARING REPORTS

You can share your report with others and include a custom message. To share a report,

1. From the Home page, click **Reports**

2. Reports page opens showing your reports. Click the desired report

3. Click **Share Report**

4. Then,
   - In Email Address, enter the email address of person to whom you want to share the report
   - In Message, enter a message
   - Click Share Report

5. Your report will be sent and you will see a message similar to the one below.
6.0 SCHEDULING REPORTS

You can use your report’s current settings to set up an automatic recurring report that is generated based on the frequency you select. Additionally, you can choose the recipients that you want to receive the schedule report. To schedule a report,

1. From the Home page, click Reports

   ![Home, Send, Manage, Reports]

2. Reports page opens showing your reports. Click the desired report

   ![Sample User Report - Last Week, Your Activity for This Month]

3. Click Schedule Report

   ![Your Activity for This Month]

4. Select a frequency

5. Select the time and on day

6. In the Recipients, enter the email address of the person to whom you want the report sent

7. Enter a message

8. Click Save Schedule

7.0 EXPORTING REPORT DATA

You can download a CSV file with the raw data generated in the report. To export the report data,

1. From the Home page, click Reports

   ![Home, Send, Manage, Reports]

2. Reports page opens showing your reports. Click the desired report

   ![Sample User Report - Last Week, Your Activity for This Month]
3. Click **Export report data**

4. Click **Edit Settings**

5. Make your changes

6. Click **Run Report**

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8.0 PRINTING REPORTS

You can print a report that is formatted for printing. To print the report,

1. From the Home page, click **Reports**

2. Reports page opens showing your reports. Click the desired report

3. Click **Printer-Friendly Report**

4. Click **Print this report**
9.0 GETTING HELP

If you are unsure or need assistance, please consider the preferred sources and order in which to contact listed below:

- **Web Resources**
  Adobe Sign Resources

- **Service Center**
  661-654-4357
  servicecenter@csub.edu