

ADOBE SIGN SERIES
Faculty and Staff

Adobe Sign REPORTS

Quick Reference Guide

MAY 2020
© 2020. All Rights Reserved.



CSU Bakersfield

REVISION CONTROL

Document Title: Adobe Sign - Reports - QRG.docx
Author: Campus Training, Dr. Tammara Sherman

Revision History

<i>Revision Date</i>	<i>Revised By</i>	<i>Summary of Revisions</i>	<i>Section(s) Revised</i>
05/08/2020	T. Sherman	Created document	All

Review / Approval History

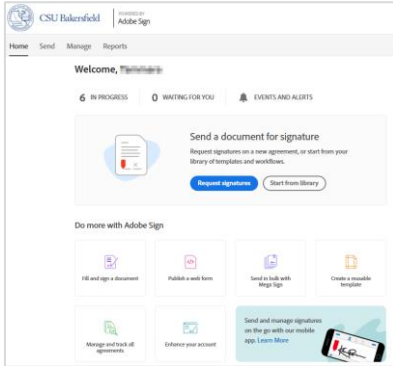
REVIEW DATE	REVIEWED BY	ACTION (REVIEWED, RECOMMENDED OR APPROVED)
-------------	-------------	--

TABLE OF CONTENTS

1.0	INTRODUCTION	4
1.1	About This Guide	4
2.0	REPORTS.....	4
2.1	Creating reports	5
2.2	Editing reports	6
2.3	Sharing reports.....	7
2.4	Scheduling reports	8
2.5	Exporting Report data	8
2.6	Printing reports.....	9
3.0	GETTING HELP.....	10

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.

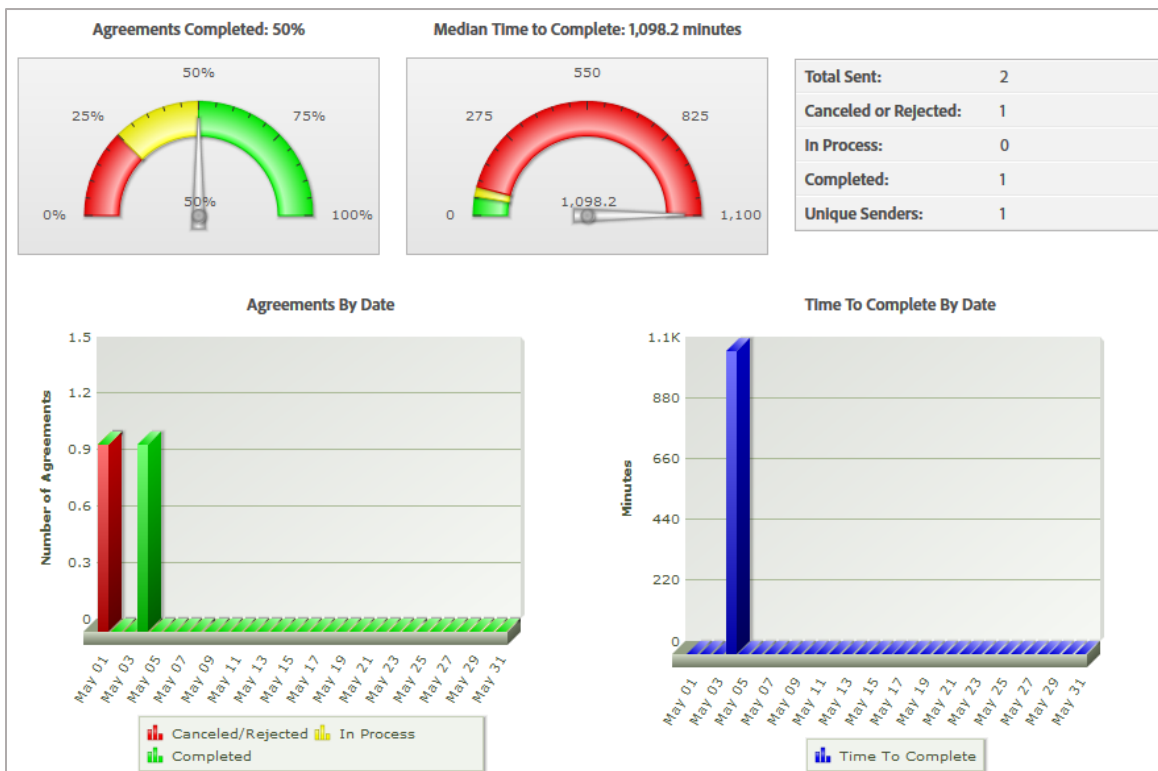


1.1 About This Guide

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

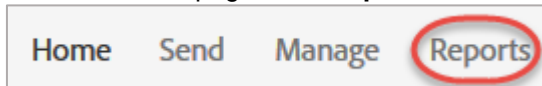
You can create reports that contain various graphs showing the signature percentage and the average time to sign. You can export a CSV file with the raw data generated from the report or print a report.



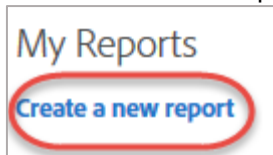
3.0 CREATING REPORTS

To create a report,

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

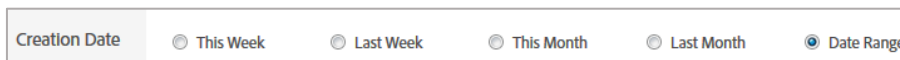


2. Click Create a new report



3. For Creation Date , make a selection

This setting determines the timeframe from which to include data in your report

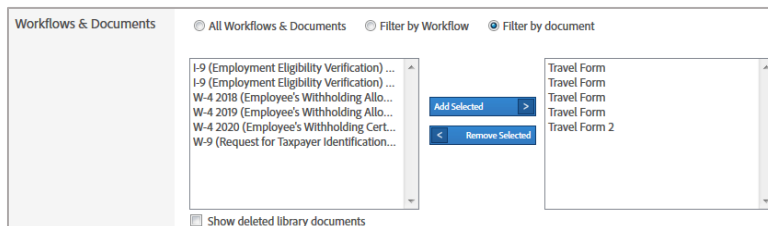


4. For Workflows & Documents, click **Filter by Document**

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**

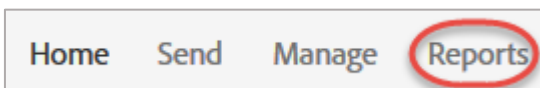
Your report opens. Click Edit Settings to make changes to your report.



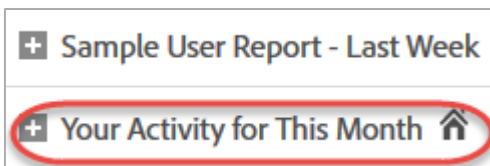
4.0 EDITING REPORTS

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

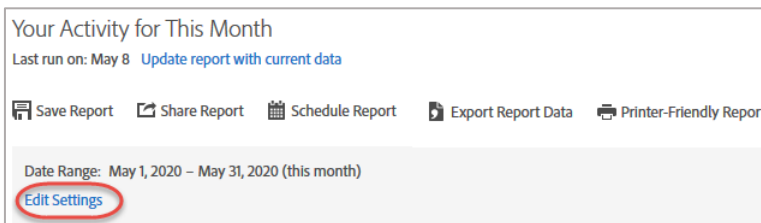
1. From the Home page, click **Reports**



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



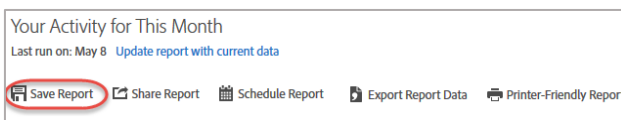
3. Click Edit Settings



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**

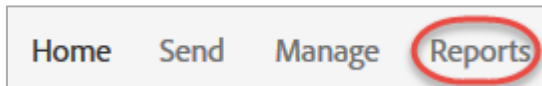
- To update an existing report with your changes, click **Update report with current data**

Last run on: May 11 [Update report with current data](#)

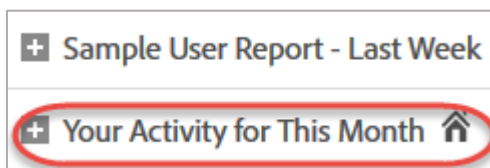
5.0 SHARING REPORTS

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

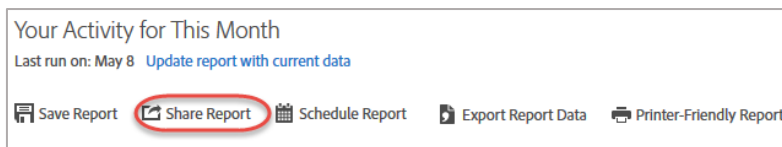
- From the Home page, click **Reports**



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



- Click **Share Report**



- Then,

- In Email Address, enter the email address of person to whom you want to share the report

Email Addresses:

- In Message, enter a message

Message:

- Click Share Report

[Share Report](#)

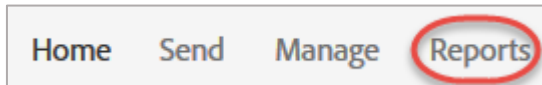
- Your report will be sent and you will see a message similar to the one below.

Your report has been shared with: [redacted]

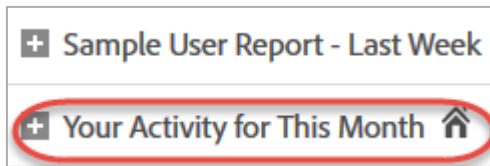
6.0 SCHEDULING REPORTS

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,

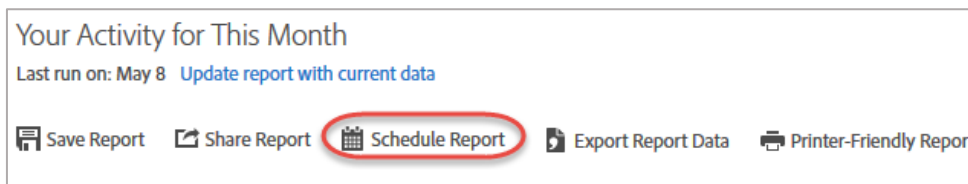
1. From the Home page, click **Reports**



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



3. Click **Schedule Report**

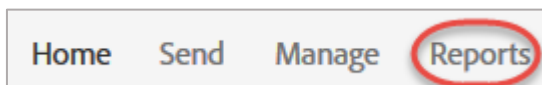


4. Select a frequency
5. Select the time and on day
6. In the Recipients, enter the email address of the person to whom you want the report sent
7. Enter a message
8. Click **Save Schedule**

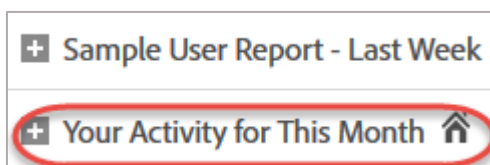
7.0 EXPORTING REPORT DATA

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

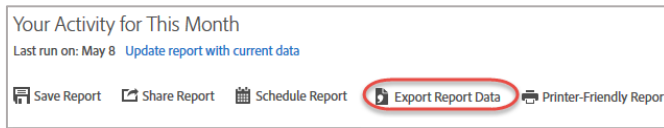
1. From the Home page, click **Reports**



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



3. Click **Export report data**



4. Click **Edit Settings**

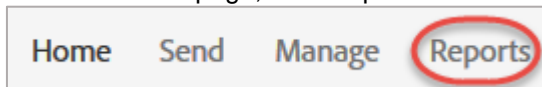
5. Make your changes

6. Click **Run Report**

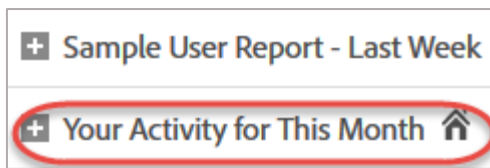
8.0 PRINTING REPORTS

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

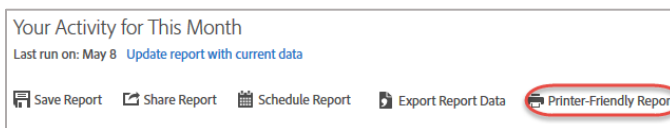
1. From the Home page, click Reports



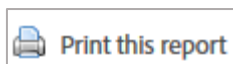
2. Reports page opens showing your reports. Click the desired report



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@csu.edu