smarter drafter PRO
by tensis

Reports

Help Guide

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1.   Reports

It's possible to create reports of form usage patterns in Smarter Drafter.

Reports include:

1. Submissions by Period.
2. Submissions by Form.
3. Submission Logs.

Note: Submissions by Company is a legacy feature that will be phased out in the near future.

1.1   Submissions by Period

A **Submissions by Period** report filters submissions during a certain time period. To access reports:

1. Click **Reports** in the navigation menu.
2. Click **Submission by Period**.
3. The **Company** option is a legacy option, your own company will be the only option.
4. Under **Form**, select the form you wish to include in the report in the menu. You may select **All** to include all forms in the report.
5. Under **Period**, select a time period to report on.
6. The **Chart Type** menu has options for the display style in the chart. The chart pictured below is a line chart.
7. Click the **View by date** selector to change the date range.
8. When you have entered the required data to display, click **Show chart**. The submissions on various dates within the selected period will be displayed, with the total count at the bottom.
9. Click **Download CSV** to receive a full, detailed report all submission activity, including:
   - submission starts and completions,
   - submission files generated,
   - answers viewed.

Below the **Download CSV** button, a table can be accessed, showing the data in the chart in line form.

Details			
Period ↑	**Count**	**Retail Count**	**Amount**
2024-12-16	4	0	$0.00
2024-12-17	4	0	$0.00
2024-12-18	2	0	$0.00
2024-12-20	1	0	$0.00
2024-12-26	2	0	$0.00

1.2   Submissions by Form

Under the **Submissions by Form** tab, you can access data about the most used and least used forms in the collection.

1. Click **Submissions by Form**.
2. Select a **Sort by** option. Normally, **Count** is the required option.
3. Under **Show**, select the data that is required. For example, Top 10 will show up to ten forms that were most popular during the time period.
4. Click the **View by date** selector to select a date range.
5. When you have entered the required data to display, click **Show chart**. The submissions on various dates within the selected period will be displayed, with the total count at the bottom.
6. Click **Download CSV** to receive a report that includes the data in the chart.

Below the **Download CSV** button, a table can be accessed, showing the data in the chart in line form.
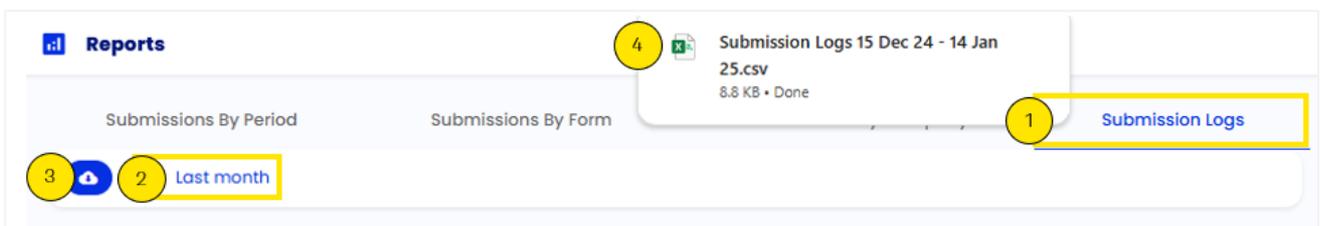
Totals: Count: 13 Retail Count: 0 Amount: $0.00			☁ Download CSV

Details ∧

Name	Count ↓	Retail Count	Amount
A_C_1_3	10	0	$0.00
A_C_1_4	2	0	$0.00
A_C_1_2	1	0	$0.00

1.3   Submissions Logs

1. Under Submission Logs, you can receive a full, detailed report all submission activity, including:

    a. submission starts and completions,

    b. submission files generated,

    c. answers viewed.

2. Click the **View by date** selector to select a date range.

3. Click the cloud shaped **Download button** to get the file.

📊 **Reports**

④ 🗎 Submission Logs 15 Dec 24 - 14 Jan 25.csv
8.8 KB • Done

Submissions By Period   Submissions By Form   ① **Submission Logs**

③ ☁ ② Last month