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## Summary Activity Reports

**NOTE:** Activity reports do not contain Personally Identifiable Information (PII) because the activity reports are sent to clients via email. Any reports with PII information need to be [Admin Reports](#) that are accessed and printed securely via FireLight® Admin.  
**Spotlight Video:** See the [Reports](#) Spotlight Feature Video for more information.

Summary Activity Reports are run on a scheduler through our automated activity reporting tool and do not appear in FireLight Admin. Each report can be sent in CSV or PDF format and is sent on an automated schedule to an organization email. A distribution email is best as it allows you to change your recipients as needed and allows the report scheduler to run efficiently.

The Summary Activity Reports have default data columns. Some configurations, such as optional columns, are available. The Summary Activity Reports provide summary data about transaction activity but do not have access to specific form data that is not stored outside of the encrypted form data.

### Sample Summary Activity Reports

Following are sample Summary activity reports. Click a link to view a sample report.

Report Name	Summary Reporting Options		Options	Frequency	Format
	Description	Default Columns			
<a href="#">FireLight Submission Summary</a> (TrnPeriodSummary)	Lists submissions by organization for the time-period specified.	<ul style="list-style-type: none"> <li>Organization Name</li> <li>Period Total</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Period Submission Summary by Product</a> (TrnPeriodSummaryProd)	Lists submissions by organization for the time-period specified broken out by product type.	<ul style="list-style-type: none"> <li>Organization Name - product type</li> <li>Period Total</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Carrier Submission Summary</a> (TrnSummaryByCarrier)	Lists submissions by organization for the time-period specified broken out by product organization.	<ul style="list-style-type: none"> <li>Product Organization Name</li> <li>Period Total</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Submission Summary by Carrier/Distributor</a> (TrnSummaryDist)	Lists carrier submission totals with distributor totals listed below the carrier.	<ul style="list-style-type: none"> <li>Organization Name</li> <li>Month to Date</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Status Summary</a> (Summary)	Lists transaction totals for each workflow status.	<ul style="list-style-type: none"> <li>Product Type</li> <li>Form Entry</li> <li>Signatures</li> <li>Review</li> <li>Submit</li> <li>Complete</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight E-Delivery Status Summary</a> (EDeliveryProdNameStatusSummary)	Lists transaction totals for each e-Delivery status.	<ul style="list-style-type: none"> <li>Product Name</li> <li>Data Entry</li> <li>Signatures</li> <li>Review</li> <li>Submit</li> <li>Complete</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Submission Summary</a> (TrnSummary)	Lists submissions by organization for the time-period specified.	<ul style="list-style-type: none"> <li>Organization Name</li> <li>Month to Date</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
<a href="#">FireLight Group Submission Summary</a> (TrnSummaryBy Group)	Lists submissions by organization for the time-period specified broken out by role code.	<ul style="list-style-type: none"> <li>Organization Name - Group Name</li> <li>Month to Date</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Product Line Submission Summary</a> (TrnSummaryByProdLine)	Lists total number of applications submitted by product type. Only new business applications are included. The report does not include other transaction types.	<ul style="list-style-type: none"> <li>Organization Name</li> <li>Period</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Submission Summary by Product</a> (TrnSummaryProd)	Lists total number of applications submitted by product type. All transaction types are included.	<ul style="list-style-type: none"> <li>Organization Name</li> <li>Month to Date</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Transaction Type Submission</a> (TransactionTypeSummary)	Lists submission totals by organization for the time-period specified broken out by transaction type.	<ul style="list-style-type: none"> <li>Organization Name - transaction types</li> <li>Period</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Submission Product Code Summary</a> (SummaryProductCode)	Lists submission totals by organization for the time-period specified broken out by product CUSIP ID.	<ul style="list-style-type: none"> <li>Organization Name - Product Name</li> <li>CUSIP ID</li> <li>Period</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">E-Delivery Product Summary</a> (EDeliveryProductSummary)	Lists e-Delivery submission totals by organization for the time-period specified broken out by Product ID. Only parent cases are included in the report.	<ul style="list-style-type: none"> <li>Organization Name - Product Name</li> <li>Period</li> <li>Year to Date</li> <li>Life to Date</li> </ul>	N/A	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Carrier Transactions by Product Type</a> (CarrierTransByProductType)	Lists submission totals by organization for the time-period specified broken out by product type. It is not broken down by distributor. Note that this report only applies to product related transactions: Application, Illustration and e-Delivery. Broken out by product type with a rolling 12-month breakdown and total.	<ul style="list-style-type: none"> <li>Organization Name - Product Type</li> <li>Monthly Totals</li> <li>Total</li> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type: <ul style="list-style-type: none"> <li>App Only</li> <li>Illustration</li> <li>E-Delivery</li> </ul> </li> <li>Exclude organizations:</li> </ul>	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Distributor Transactions by Product Type</a> (DistributorTransByProductType)	Lists submission totals by organization for the time-period specified broken out by activity type, product type and carrier. Note that this report applies only to product related	<ul style="list-style-type: none"> <li>Activity Type - ACORD Type - Billing Code</li> <li>Organization Name - Product Type</li> <li>Monthly Totals</li> <li>Total</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type: <ul style="list-style-type: none"> <li>App Only</li> <li>Illustration</li> </ul> </li> </ul>	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
	transactions: Application, Illustration and E-Delivery. Broken out by product type with a rolling 12-month breakdown and total.	<ul style="list-style-type: none"> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>E-Delivery</li> <li>Exclude organizations:</li> </ul>		
<a href="#">FireLight Distributor Transactions by Carrier</a> (DistributorTransByCarrier)	Lists submission totals by distributor organization for the time-period specified broken out by activity type and carrier.	<ul style="list-style-type: none"> <li>Activity Type - ACORD Type - Billing Code</li> <li>Organization Name - Carrier Name</li> <li>Monthly Totals</li> <li>Total</li> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type:               <ul style="list-style-type: none"> <li>App Only</li> <li>Illustration</li> <li>Needs Determination</li> <li>Post Issue</li> <li>Account Opening</li> </ul> </li> </ul>	Daily Weekly Monthly	PDF CSV
<a href="#">FireLight Carrier Transactions by Distributor</a> (CarrierTransByDistributor)	Lists submission totals by carrier organization for the time-period specified broken out by activity type and distributor.	<ul style="list-style-type: none"> <li>Activity Type - ACORD Type - Billing Code</li> <li>Organization Name - Distributor Name</li> <li>Monthly Totals</li> <li>Total</li> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type:               <ul style="list-style-type: none"> <li>App Only</li> <li>Illustration</li> <li>Needs Determination</li> <li>Post Issue</li> <li>Account Opening</li> <li>Other</li> </ul> </li> </ul>	Daily Weekly Monthly	PDF CSV
<a href="#">Carrier Transactions by Distributor by Product Name</a> (CarrierTransByDistributorByProduct)	Lists submission totals for transactions for a carrier broken out by distributor (if applicable), activity type and product name shown with a rolling 12-month breakdown and total. The breakdown by carrier includes the carrier if the organization has direct transactions or only the carrier if it has no distributors.	<ul style="list-style-type: none"> <li>Activity Type - ACORD Type - Billing Code</li> <li>Organization Name - Product Name</li> <li>Monthly Totals</li> <li>Total</li> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type:               <ul style="list-style-type: none"> <li>App Only</li> <li>Sub-Pay</li> <li>Needs Determination</li> <li>Post Issue</li> <li>Account Opening</li> </ul> </li> <li>InsTech Managed Option               <ul style="list-style-type: none"> <li>None</li> <li>Remove InsTech Managed</li> <li>InsTech Managed Only</li> <li>Denote InsTech Managed</li> </ul> </li> <li>Exclude Organizations:</li> </ul>	Daily Weekly Monthly	PDF CSV
<a href="#">Deployment History Report</a> <b>Deployment History Report</b>	Lists history of each Hexure component deployed to Production, such as Form, Wizard, Rule Set, Package, Products, etc.	<ul style="list-style-type: none"> <li>Source Org</li> <li>Destination Org Environment</li> <li>Auto Deploy</li> <li>Deployment Date</li> <li>Deployment Scope</li> </ul>	<ul style="list-style-type: none"> <li>Sync Scope</li> <li>To Server</li> <li>To Org</li> <li>Start Date</li> <li>End Date</li> </ul>	Daily Weekly Monthly	CSV

Report Name	Description	Default Columns	Options	Frequency	Format
		<ul style="list-style-type: none"> <li>Description</li> </ul>			
<a href="#">Distributor Transactions by Carrier by Product Name</a> (DistributorTransByCarrierByProduct)	Lists submission totals for transactions for a distributor broken out by carrier name, activity type and product name with a rolling 12-month breakdown and total.	<ul style="list-style-type: none"> <li>Activity Type - ACORD Type - Billing Code</li> <li>Organization Name - Product Name</li> <li>Monthly Totals</li> <li>Total</li> <li>Average</li> </ul>	<ul style="list-style-type: none"> <li>List All Transaction Types</li> <li>Limit by Transaction Type:               <ul style="list-style-type: none"> <li>App Only</li> <li>Sub-Pay</li> <li>Needs Determination</li> <li>Post Issue</li> <li>Account Opening</li> </ul> </li> <li>Exclude Organizations:</li> </ul>	Daily Weekly Monthly	PDF CSV
<a href="#">Illustration User Summary</a> (IllustrationUserSummaryReport)	Lists number of unique users and number of user transactions by organization.	<ul style="list-style-type: none"> <li>Organization ID</li> <li>Organization Name</li> <li>Agent ID (User ID)</li> <li>Transactions</li> <li>Total</li> </ul>		Daily Weekly Monthly	PDF CSV
<a href="#">Number of Active Users by Organization</a> (ActiveUsers) For Carriers and Distributors	Lists number of active users by organization over a 12-month rolling monthly view.		N/A	Daily Weekly Monthly	PDF CSV
<a href="#">Number of Registered Users by Organization ID</a> (RegisteredUsersForOrganization) For Carriers and Distributors	Lists number of registered users by organization over a 12-month rolling monthly view.		N/A	Daily Weekly Monthly	PDF CSV
<a href="#">Number of Users with Submissions by Organization</a> (SubmitterUsers) For Carriers and Distributors	Lists number of users with submissions by organization over a 12-month rolling monthly view.		N/A	Daily Weekly Monthly	PDF CSV
<a href="#">Number of Users with One Submission by Organization</a> (OneSubmitterUsers) For Carriers and Distributors	Lists number of users with only 1 submission in a given month by organization over a 12-month rolling monthly view.		N/A	Daily Weekly Monthly	PDF CSV
<a href="#">Submission Summary Report Grouped by Jurisdiction</a> (SubmissionSummaryReportGroupedByJurisdiction) Submission Summary Report Grouped by Jurisdiction	Lists apps data based on Jurisdiction.	Starting Date Ending Date Organization Period Year to Date Life to Date	N/A	Daily Weekly Monthly	PDF CSV

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