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Detailed 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.

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

Typical Activity Report Setup

Activity reports can be scheduled via the [Activity Reports Scheduler](#).

Carrier

- Daily – Detail, Failed, Summary, Purged
- Weekly – Pending Purge
- Monthly – Detail, Summary

Carriers with Multiple Distributors

- Daily – Detail By Channel, Failed, Purged
- Weekly – Pending Purge
- Monthly – Detail By Channel

Distributors with Multiple Carriers

- Daily – Detail, Failed, Submission Summary (TrnSummary)
- Weekly – Pending Purge
- Monthly – Detail

Have a New Activity Report Delivered via SFTP

1. Client provides the following SFTP information to the Strategic Account Manager.
Host Address/IP Address
Port
Username
Password
Directory to Upload to: [if any, default is just “/”]
2. The Strategic Account Manager creates a new JIRA ticket with Network Services to whitelist the Host address/IP Address and port on the UAT/ Production firewall.
3. Once the whitelist has been adjusted, the Strategic Account Manager creates an activity report JIRA ticket as normal, specifies in the JIRA ticket that the report should be delivered via SFTP, and includes the host address/IP address, port, and directory (NOT the username or password).
4. The developer contacts the Strategic Account Manager to receive the username and password outside of the JIRA ticket.

Sample Detailed Activity Reports

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

Report Name	Description	Detail Reporting Options		Frequency	Format
		Default Columns	Options		
Application Status (ApplicationStatusReport)	Lists application information including the current status, display status, review queue information, and whether E-Sign was used.	<ul style="list-style-type: none">• Policy Number• Application• Carrier• Product• Last Update Date• Current Status• Display Status• Signature• Date Entered Review Queue• Review Queue		Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
		<ul style="list-style-type: none"> Reviewer Agent 			
Case Access Verification (CaseAccessVerification)	Lists applications that have been viewed by someone other than the owning agent.	<ul style="list-style-type: none"> Application Name Status Date Viewed By Viewed Agent ID Viewed Group Code Message Owning Agent Owning Agent ID Owning Group Code 	<ul style="list-style-type: none"> Exclude Role Code (can exclude multiple role codes (e.g., support personnel role codes) from the report who have a legitimate reason for viewing agents' applications) 	Daily Weekly Monthly	PDF CSV
FireLight Bounce Back Email Report (EmailBounceBacks)	Lists SendGrid bounce back email notifications for an organization. The report is grouped by Activity Type (Illustration, Application, e-Delivery Fill and Sign, etc.).	<ul style="list-style-type: none"> Activity ID Activity Name Activity Status Agent ID Email Reason Email Address Error Date Error Reason 		Daily Weekly Monthly	CSV
FireLight Detail Declined Signature (DetailDeclineSign)	Lists all applications where agent has declined electronic signature.	<ul style="list-style-type: none"> Package ID Product Name Application Name Transaction Type Create Date Agent ID 	<ul style="list-style-type: none"> Add column Role Code / Header name for role code 	Daily Weekly Monthly	PDF CSV
FireLight Detailed Status Report (DetailDisplayStatus)	Lists the status and display status of all activities that have not been deleted between the requested dates.	<ul style="list-style-type: none"> Activity ID Application Name Status Updated Date Status Display Status 		Daily Weekly Monthly	PDF CSV
FireLight Enrollment Report Active Applications (EnrollmentApplicationReport)	Lists the enrollment activity for the organization. This report is sortable by Group, then Status in alphabetical order, and then by Application Name in alphabetical order.	<ul style="list-style-type: none"> Agent ID Agent Name Group ID Application Name Status Product Name Create Date Last Activity Elapsed Days 		Daily Weekly Monthly	PDF CSV
FireLight Successful Submission (Detail)	Lists all applications successfully submitted that day. This report lists only applications that would be invoiced by Hexure. Totals for each transaction type allowed by organization are listed.	<ul style="list-style-type: none"> Package ID Product Name Create Date Submit Date Elapsed Days Application Name Transaction Type 	<ul style="list-style-type: none"> Add column Role Code / Header name for role code 	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
FireLight Submission Status (DetailSubmissionStatus)	Lists all applications that are in the Pending Review status.	<ul style="list-style-type: none"> Package ID Product Name Create Date Agent Name Application Name Transaction Type 	<ul style="list-style-type: none"> Change the status parameter from Pending Review to a different status 	Daily Weekly Monthly	PDF CSV
Agent Successful Submission (AgentFirmSubmission)	Lists all applications successfully submitted ordered by product type.	<ul style="list-style-type: none"> Application Name TransRefGUID Create Date Submit Date Product Name Transaction Type UserName Policy Number 	<ul style="list-style-type: none"> Add column External Mapcode / Header name for external mapcode Header name for Policy Number Add column Firm ID / Header name for Firm ID 	Daily Weekly Monthly	PDF CSV
FireLight Detailed Submission by Channel (DetailByChannel)	Lists submission by organization for the time-period, broken down by the distributor submitting the business. This report contains counts for each of the transaction types. This is a good report for carriers to receive if their product is being sold by multiple distributors.	<ul style="list-style-type: none"> Package ID Product Name Create Date Submit Date Elapsed Days Application Name Transaction Type 	N/A	Daily Weekly Monthly	PDF CSV
FireLight Detailed Submission by Carrier (DetailByCarrier)	Lists all applications submitted for the time period broken down by the carrier's Product Code (dependent on the carrier adding the Product Code in Admin).	<ul style="list-style-type: none"> TransRefGUID Product Name Policy Number Submit Date Owner Name Application Name Transaction Type 	<ul style="list-style-type: none"> Replace owner with Signer Type 1 / Header name for Signer Type 1 Add column for Signer Type 2 / Header name for Signer Type 2 	Daily Weekly Monthly	PDF CSV
Distributor Detail by Carrier (DistDetailByCarrier)	Lists all applications submitted for the time period broken down by the carrier's product organization (instead of the carrier's Product Code as in the Detailed Submission by Carrier report above).	<ul style="list-style-type: none"> TransRefGUID Product Name Policy Number Submit Date Owner Name Application Name Transaction Type 	<ul style="list-style-type: none"> Replace owner with Signer Type 1 / Header name for Signer Type 1 Add column for Signer Type 2 / Header name for Signer Type 2 	Daily Weekly Monthly	PDF CSV
Distributor Detail by Carrier by Role Code (DistDetailCarrierByRole Code)	Lists all applications successfully submitted for the time period broken down by the carrier's product organization by role code.	<ul style="list-style-type: none"> TransRefGUID Product Name Product Type Policy Number Submit Date Owner Name Application Name Transaction Type 	<ul style="list-style-type: none"> Replace owner with Signer Type 1 / Header name for Signer Type 1 Add column for Signer Type 2 / Header name for Signer Type 2 	Daily Weekly Monthly	PDF CSV
DTI Successful Submission (DTIDetailItemDetail)	Lists all applications successfully submitted for the time period. This report provides the ability to use application search items that are stored for each app. See your	<ul style="list-style-type: none"> TransRefGUID Submit Date Product Name Transaction Type Owner Name Agent Name 	<ul style="list-style-type: none"> Add column Application Search Item 1 / Header name for Application Search Item 1 Add column Application Search Item 2 / Header name for Application Search Item 2 	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
	Strategic Account Manager for details.		<ul style="list-style-type: none"> Add column DTI Number / Header name for DTI number Add column Role Code / Header name for role code Replace owner with Signer Type / Header name for signer type Add column Used Cooperative Technologies / Header name for used CT 		
DTI Detail (DTIDetail)	Lists all applications submitted for the time-period. This report includes the transRefGuid ID (DTI) for each application.	<ul style="list-style-type: none"> TransRefGUID Submit Date Product Name Transaction Type Owner Name DTI Number 	<ul style="list-style-type: none"> Replace Owner Signer Type with signer type / Header name for signer type Add column External Mapcode / Header name for external mapcode Add column Role Code / Header name for role code Add column Use of Review Queue / Header name for use of review queue 	Daily Weekly Monthly	PDF CSV
FireLight Failed Submission (Failed)	Lists all applications that failed submission and are still within the retry queue for processing.	<ul style="list-style-type: none"> Package ID Product Name Create Date Resubmit Date Application Name 	<ul style="list-style-type: none"> Add column Role Code / Header name for role code Add column DTI Number / Header name for DTI number 	Daily Weekly Monthly	PDF CSV
FireLight Illustration User Detailed Report (IllustrationUserDetailed)	Lists the unique active users accessing this activity for a 90-day time frame. If a user has at least one non-test illustration (report or calcs) within the last 90 days, they are considered active.	<ul style="list-style-type: none"> Agent ID (User ID) Carrier Seller Name Transaction ID Request ID Create Date CUSIP Request Type 	<ul style="list-style-type: none"> Active In Days _____ (defaults to 90 for a 90-day time frame for the report) 	Daily Weekly Monthly	PDF CSV
Pending Deletion (PendingDeletion)	Lists all of the uncompleted applications pending deletion according to the organization's purge policy set in the Admin.	<ul style="list-style-type: none"> Agent ID Agent Name Product Name Create Date Purged Date Status Application Name Transaction Type 	<ul style="list-style-type: none"> Set Number of days before deletion / Header name for days before deletion 	Daily Weekly Monthly	PDF CSV
E-Delivery Pending Expiration (EDeliveryPendingExpiration)	Lists all applications with only e-Delivery activities that are not in terminal status. Report includes only parent cases (does not include any child cases).	<ul style="list-style-type: none"> Firm ID Policy Number Agent Name Product Name Application Name Create Date Last Activity Elapsed Days Expiration Date Display Status 	N/A	Daily Weekly Monthly	PDF CSV
Pending Orders (PendingOrders)	Lists all active applications in edit application status for the time-period.	<ul style="list-style-type: none"> Firm ID Agent Name 	<ul style="list-style-type: none"> Add column Role Code / Header name for role code 	Daily Weekly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
		<ul style="list-style-type: none"> Application Name Transaction Type Create Date Last Activity Date Elapsed Days 	<ul style="list-style-type: none"> Add column Application Search Item / Header name for application search item Min/Max Values (i.e., to pull apps for last 30 days, use 0/30) 	Monthly	
Pending Purge (PendingPurge)	Lists active applications (both completed and uncompleted) scheduled to be purged at the next purge cycle according to the organization's purge policies.	<ul style="list-style-type: none"> Agent ID Agent Name Product Name Create Date Last Update Date Status Application Name 	N/A	Daily Weekly Monthly	PDF CSV
Purged Applications (Purged)	Lists all applications purged from the system within the time period specified.	<ul style="list-style-type: none"> Package ID Product Name Create Date Last Activity Purged Date Status Application Name Transaction Type 	N/A	Daily Weekly Monthly	PDF CSV
Quote Activity Report (QuoteActivitiesReport)	<p>Lists all quotes by FireLight user and number of quotes linked to an e-Application by line of business.</p> <p>Includes the number of Total Quotes, Annuity Quotes with Lined e-App, Life Quotes with Linked e-App, and Total Quotes with Linked e-App if the count is greater than zero.</p>	<ul style="list-style-type: none"> Quote Name Create Date Quote ID Product Type Agent Name Linked e-Application Linked Policy Number Linked e-Application Status 		Daily Weekly Monthly	PDF CSV
Review Queue (ReviewQueue)	Lists the applications that are currently in each review queue.	<ul style="list-style-type: none"> Date (created) Product Agent Owner Current Queue Reviewer Name Reviewer ID # of Days in Current Queue # of Days in Review Queue 	<ul style="list-style-type: none"> Use Agent Name from App Search Items Use Owner Name from App Search Items / Header name for Owner Name Replace Owner Signer Type with signer type 	Daily Weekly Monthly	PDF CSV
Review Queue Reviewer (ReviewQueueReviewer)	Lists the applications that have been approved or rejected from the queue.	<ul style="list-style-type: none"> Reviewer Name Client Name Time Elapsed Date Entered Queue Date Review Completed Approval Status Agent Name Queue Name 	<ul style="list-style-type: none"> Use Agent Name from App Search Items Use Client Name from App Search Items / Header name for Client Name Replace Client Signer Type (owner) with signer type Add column for App Search Item / Header name for App Search Item Add column for product organization name / Header name 	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
			for product organization name		
			<ul style="list-style-type: none"> Add column for E-Signed (Yes/No) / Header name for E-Signed 		
Review Queue Move (ReviewQueueMove)	Lists the applications that have been manually or automatically moved into a queue.	<ul style="list-style-type: none"> Reviewer Name Client Name Agent Name Date Entered Queue Queue Name 	<ul style="list-style-type: none"> Use Agent Name from App Search Items Use Client Name from App Search Items / Header name for Client Name Replace Client Signer Type (owner) with signer type 	Daily Weekly Monthly	PDF CSV
Review Queue Release (ReviewQueueReleaseReport)	Lists the applications that have been manually or automatically released.	<ul style="list-style-type: none"> Application ID Application Name Status Create Date Policy Number Action Action Date Manual Rel User Name 		Daily Weekly Monthly	PDF CSV
FireLight Expiration Deadline Date (ExpirationDeadlineDate Detailed)	Lists all of the activities that have expired from the Review Queue per the expiration deadline date.	<ul style="list-style-type: none"> Activity Type Agent Agent ID Case Name Create Date Last Activity Expired Date Status 		Daily Weekly Monthly	PDF CSV
FireLight Pending Expiration Deadline Date (PendingExpirationDeadline DateDetailed)	Lists all of the activities that are pending expiration from the Review Queue per the expiration deadline date.	<ul style="list-style-type: none"> Activity Type Agent Name Agent ID Case Name Create Date Last Activity Days Elapsed Pending Expired Date Status 		Daily Weekly Monthly	PDF CSV
GIACT Web Service Detailed Report (GIACTTransactionActivity) See the Service Request Table Reporting Changes Spotlight Feature Video for more information.	Lists all transactions that have an account response code (and customer response code if applicable), which provides the volume of transactions utilizing the GIACT web services. The purge policy for this report is 3 years (1095 days). This report is available for carriers and distributors.	<ul style="list-style-type: none"> ACORD Type (eApp, eDelivery, etc.) Agent ID Distributor Transaction ID (AppID) Call Date Initiating Organization Account Response Code (gVerify) Customer Response Code (gAuthenticate) 		Daily Weekly Monthly	PDF CSV
LexisNexis Usage Report (LexisNexisUsage) See the Service Request Table Reporting Changes Spotlight Feature Video for more information.	Lists the total uses of LexisNexis and LexisNexisRisk for the period. The purge policy for this report is 3 years (1095 days). NOTE: The Service Type column displays "Risk	<ul style="list-style-type: none"> TransRefGUID RefID (Lex ID) Date Carrier Distributor 	N/A	Daily Weekly Monthly	PDF CSV

Report Name	Description	Default Columns	Options	Frequency	Format
	Classifier," "Quiz" or "Instant ID" to distinguish between the various LexisNexis web services.	<ul style="list-style-type: none"> • DTI Number • Conversation ID • Quoteback ID • Case Name • Agent Name • User ID • Agent ID • Service Type • Submit Date 			
Milliman Usage Report (MillimanUsageReport)	Lists all Milliman requirements ordered (RX, MIB, MVR) by the organization for the time period.	<ul style="list-style-type: none"> • Application Name • Requirements Ordered • Order Number • Order Date • Order Request Result • Order Response Result • Results Status • Completion Date • Writing Agent Name • User Name • Carrier 	N/A	Daily Weekly Monthly	PDF CSV
Paramed Vendor Activity Report (ParamedVendorActivityReport)	Lists all APPS and ExamOne (LabOne) Paramed Exams ordered by the organization for the time period.	<ul style="list-style-type: none"> • Paramed Vendor • Paramed Status • Order Date • Last Status Date • Product Name • Application Name • Writing Agent Name • User Name • External Role Code • Carrier 	N/A	Daily Weekly Monthly	PDF CSV
Third-Party Usage Report (ThirdPartyUsage_All)	Lists the Third-Party Usage for All Third Parties except for Cooperative Technologies (a separate report below). Includes Total Web Service Calls per Third-Party and Total Web Service Usage.	<ul style="list-style-type: none"> • Application ID • Web Service • Call Date • Organization • Config Group • Allow Esign 	NOTE: DocuSign is currently the only third-party service request that is setting the Config Group in the service request.	Daily Weekly Monthly	PDF CSV
Third-Party Cooperative Technologies Usage (ThirdPartyServiceUsage_CT1035) See the Service Request Table Reporting Changes Spotlight Feature Video for more information.	Lists the total uses of the Cooperative Technologies 1035 Yellow Pages for the period. The purge policy for this report is 3 years (1095 days).	<ul style="list-style-type: none"> • TransRefGUID • RefID • Form Number • Call Date • Initiating Organization • Selling Organization • Ceding Carrier CT ID • Universal Location ID 	N/A	Daily Weekly Monthly	PDF CSV
Transaction Detail Report [Beta] (TransactionDetail_All)	Transaction Lists all visible wizards within the packet and all fields presented to the agent and the customer,	<ul style="list-style-type: none"> • Confirmation Number • Transaction ID 	Org setting must be enabled via a support ticket to receive this report	For those with Transaction Detail Reports enabled, whenever an	PDF

Report Name	Description	Default Columns	Options	Frequency	Format
	whether or not a value is entered.	<ul style="list-style-type: none">StatusStateProductCarrier		application is submitted	

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