Usage by Agent

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Download the Usage by Agent report to see who's logging in, who's uploading, and who hasn't touched Pipeline at all.

Introduction

You set the logins up months ago. The question now is which of them anyone is actually using, and that's not something the office can answer from memory.

Usage by Agent turns it into a spreadsheet. Every user in the account gets a row, and each column counts one kind of activity across the period you pick, so a person who has never signed in reads as plainly as the person uploading every day. It measures activity rather than production, which is what makes it the adoption view rather than a performance report.

Run it after a training push and the before and after sit next to each other. Run it when someone asks whether the office has really moved onto Pipeline, and you have a roster to show instead of an impression to defend. Either way it settles something that would otherwise stay a conversation.

How It Works

You pick a period, Pipeline builds the spreadsheet, and every user in the account gets a row whether they were active or not.

Where It Lives

It's in the **Account Stats** section of the Reports page's left menu, under Total Usage.

The Report Period

Choose the last 30, 60, or 90 days, a full calendar year, or a date range you set yourself. Last 30 days is what's selected until you change it.

One Row Per User

Every user in the account appears, admins and agents alike. Someone who has never logged in still gets a row, with the activity columns empty. That's what makes the report useful for adoption checks rather than just activity counts.

What Each Column Shows

- **Account Added On** — the date the user was added to Paperless Pipeline.
- **Last Login** — the date the user last logged in. A blank here means they've never logged in at all.
- **Docs Uploaded** — how many docs the user uploaded during the report period.
- **Docs Reviewed** — how many docs the user reviewed during the report period.
- **Transactions Created** — how many transactions the user created during the report period.
- **Transactions Closed (Total Sides)** — how many times the user was added as an agent to either side of a

closed transaction whose Close Date falls in the report period.
- **Maildrop Used** — how many times the user sent an email or doc into Pipeline through their Maildrop address during the report period.
- **Logins in Period** — how many times the user logged in during the report period.
- **Has Temp Password** — reads Yes when the user is still signing in with their temporary password.

What It Doesn't Cover

The report gives you dates and counts, not timestamps. There's no login time, no session length, and no record of which transactions a user opened. Per-transaction activity lives in each transaction's own history.

Download a Usage by Agent Report

Choose a report period on the Reports page, then download the spreadsheet.

Who Can Do This: Master admins only. The Account Stats group stays master-admin-only no matter what other permissions an admin holds.

To download a Usage by Agent report:

1. Click [Reports] from the top menu.
2. Click [Usage by Agent] from the **Account Stats** section of the left menu.
3. Choose your Report Period. Last 30 days is selected by default.
4. Click [Download Spreadsheet].

The spreadsheet saves to your computer. Open it in your spreadsheet app to see a row for every user and a column for each kind of activity in the period you chose.

See What Someone Did on One Deal

This report answers how much, per person, across the account. It can't answer what, on a particular file — there are no timestamps in it and no record of which transactions anybody opened. That trail is kept on each transaction instead, which is the place to go when the question is about one deal rather than one person's year.

Pipeline records every change on a transaction — search that history by action, person, or date.

See Activity History

Frequently Asked Questions

How do I find out who has never logged in?

Look for a blank Last Login. Download the report for any period, then scan the Last Login column. Every user in the account gets a row, so anyone with nothing in that column has never signed in. Pair it with the Has Temp Password column to spot the people who never acted on their welcome email.

Can I run the report for a date range I choose?

Yes. Alongside the last 30, 60, and 90 days and full calendar years, you can set your own start and end dates before downloading.

Who can download this report?

Master admins only. The Account Stats group stays master-admin-only regardless of any other permission an admin holds, so granting more permissions won't open it. Promoting the person to master admin is the only route.

Does the report include admins, or only agents?

Everyone. Every user in the account gets a row, so the report works just as well for checking a transaction coordinator's or an admin's activity as an agent's.

Can I see login times, not just dates?

No. The report gives each user's last login date and a count of logins in the period. There's no timestamp, no session length, and no time-in-system figure. If you're trying to measure hours worked, this report won't get you there.

Is there a report of who opened which transaction?

No. Usage by Agent counts activity per user, not access per transaction. To see who touched a specific file, open that transaction and read its own history.