

## How to Make a Quick Report

**Market:** House, Senate

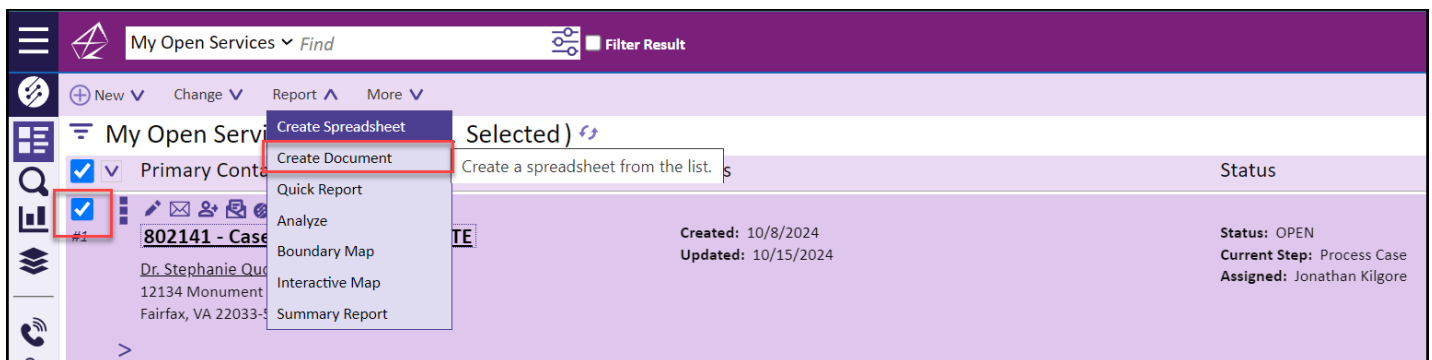
**Description:** This guide provides instructions on how to make a Quick Report. This document uses the Print Summary Quick Report as an example and demonstrates how to run it.

[Creating the Print Summary Report](#)

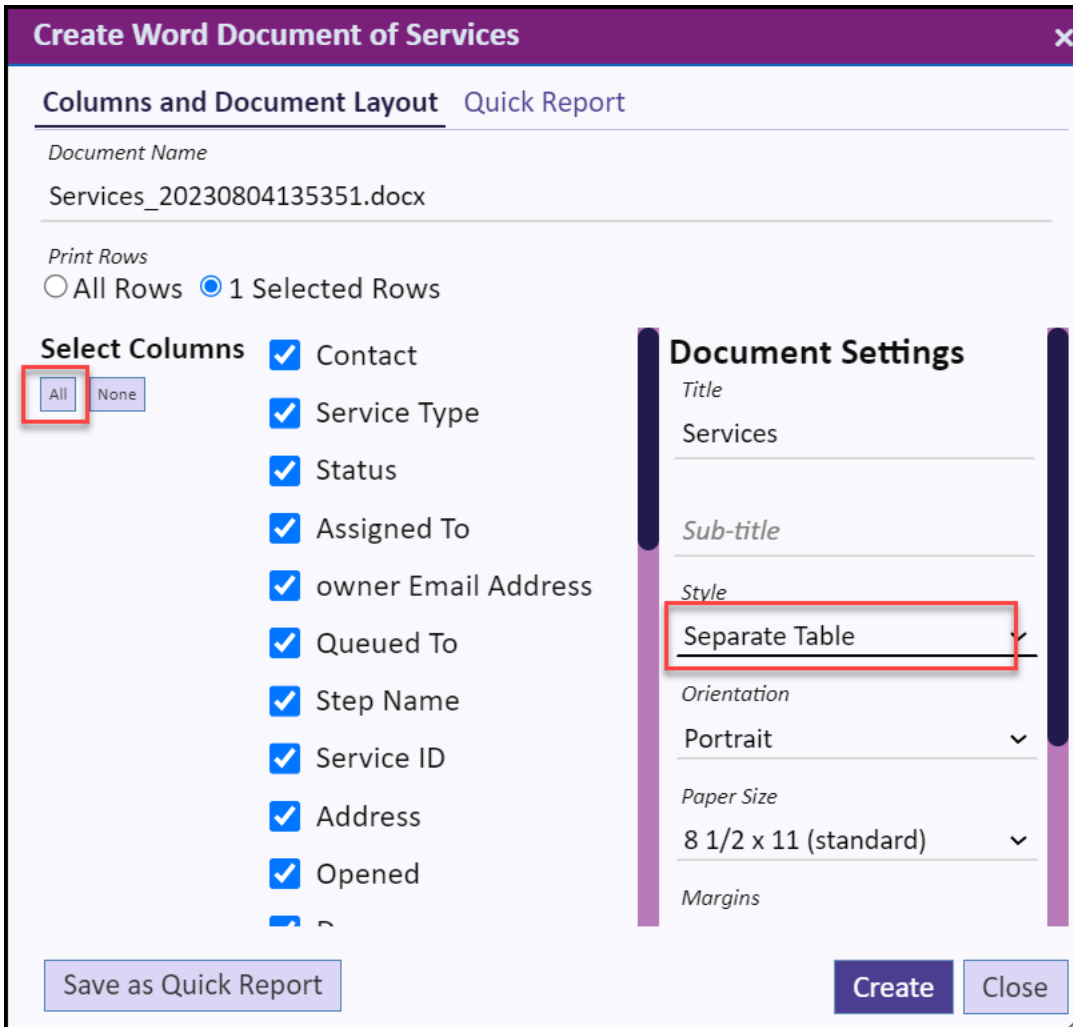
[Running the Print Summary Quick Report](#)

### Creating the Print Summary Report

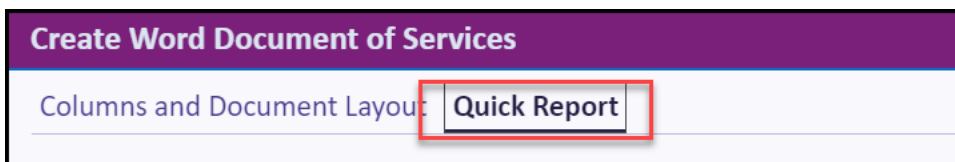
1. Navigate to **Services** → **My Open Services** view. Select a service record by clicking the box next to the service name.
2. Select **Report** → **Create Document**.



3. In the **Create Word Document of Services** window, choose the following options:
  1. In the **Select Columns** area → All Columns
  2. In the **Document Settings** area, Style → Separate Table.



4. Navigate to the top tabs and click **Quick Report**.



5. Name the Quick Report and assign to appropriate Users or Groups. Then click **Save as Quick Report**.

**Create Word Document of Services** [X]

Columns and Document Layout **Quick Report**

Quick Report Name  
Print Summary

Bella Strom X Jonathan Kilgore X Joy Betaharon X



Assign User

LDSI Trainers X

Assign Group

Save as Quick Report Create Close

*Running the Print Summary Quick Report*

1. Select either  next to the record in the services list, or  next to the **Actions** button, and select **Quick Report**.
2. In the **Quick Report** window, select the **Quick Reports** tab, click into the **Report Name** dropdown to select your Quick Report and click **Create**.
3. Save the file and open.