

Generating or Emailing a Report

Market: Federal/State/Local, House, Senate

Description: In IQ, each report is unique and therefore, the actions that are applicable to a report will vary. This particular report is used in this example to teach users how to generate a report for a specific time or for an automated emailing of this report to selected users during a set time frame.

The Executive Summary Drill Down Report is one of the most popular reports in IQ used by different offices and staff to further view data on Messages, Services, and Outreach data.

1. Navigate to Message or Service module.
2. Under **Utilities**, click **Reports**.



3. Select **The Executive Summary Drill Down Report**.

Generating the report

1. Complete the fields below using your reporting preferences.

Select your Criteria

Select a report to run or email:

Last Week

Or select a custom date range:

Start Date End Date

Message Filters:

Issue

Excluding Issue

County

City

Zip

Or select a previous report:

Executive Summary Drilldown Report from 1/1/2021 to 12/16/20...

Include Sections

Messages

Message Volume Trends

Services

Service Volume Trends

Email Outreach

Postal Outreach

2. Click **Run Report**.

Emailing the report

1. Complete the fields below using your reporting preferences.

Select your Criteria

Select a report to run or email:

Or select a custom date range:

Message Filters:

Issue

Excluding Issue

County

City

Zip

Or select a previous report:

Include Sections

Messages

Message Volume Trends

Services

Service Volume Trends

Email Outreach

Postal Outreach

2. Click **Email Report**.
3. Complete the information regarding emailing preferences.

Email Report

When to send the email:

[Schedule this report to email every](#)

Email the report to:

Enter each email on a separate line

From Address (Optional):

Enter email

Subject (Optional):

Enter the email subject

Message (Optional):

Enter the email message

Password to Encrypt Report (Optional):

Password for report

4. Click **Email**.