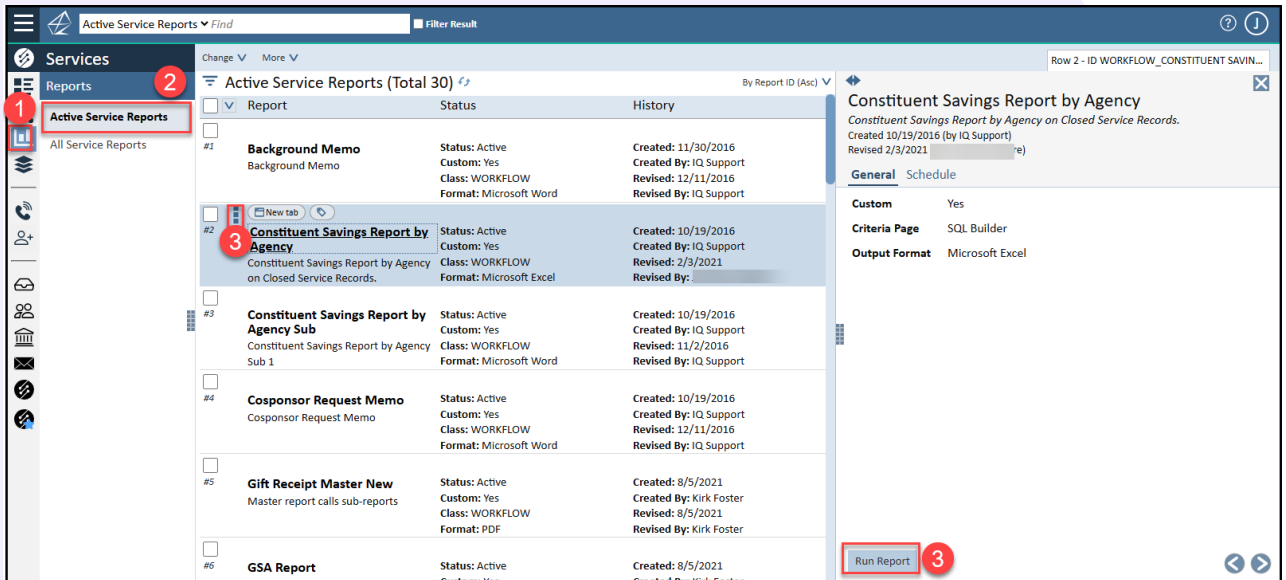


Running Reports

Market: House, Senate

Description: These instructions teach users how to access IQ reports.

1. From within any application, click the  icon.
2. Select the type of report(s) in the list view, and the reports list will display.
3. Select a report to view. Click the  icon or the **Run Report** button to select criteria for the Report.



The screenshot displays the 'Active Service Reports' interface. On the left, a sidebar shows a list of services, with 'Reports' selected and highlighted by a red circle with the number 1. The main area shows a list of reports under the heading 'Active Service Reports (Total 30)'. The list includes reports such as 'Background Memo', 'Constituent Savings Report by Agency', 'Constituent Savings Report by Agency Sub', 'Cosponsor Request Memo', 'Gift Receipt Master New', and 'GSA Report'. The 'Constituent Savings Report by Agency' is selected, highlighted by a red circle with the number 2. To the right of the list, the details for the selected report are shown, including its status, creation date, and revision history. At the bottom right, a 'Run Report' button is highlighted by a red circle with the number 3.

Report	Status	History
#1 Background Memo Background Memo	Status: Active Custom: Yes Class: WORKFLOW Format: Microsoft Word	Created: 11/30/2016 Created By: IQ Support Revised: 12/11/2016 Revised By: IQ Support
#2 Constituent Savings Report by Agency Constituent Savings Report by Agency on Closed Service Records.	Status: Active Custom: Yes Class: WORKFLOW Format: Microsoft Excel	Created: 10/19/2016 Created By: IQ Support Revised: 2/3/2021 Revised By:
#3 Constituent Savings Report by Agency Sub Constituent Savings Report by Agency Sub 1	Status: Active Custom: Yes Class: WORKFLOW Format: Microsoft Word	Created: 10/19/2016 Created By: IQ Support Revised: 11/2/2016 Revised By: IQ Support
#4 Cosponsor Request Memo Cosponsor Request Memo	Status: Active Custom: Yes Class: WORKFLOW Format: Microsoft Word	Created: 10/19/2016 Created By: IQ Support Revised: 12/11/2016 Revised By: IQ Support
#5 Gift Receipt Master New Master report calls sub-reports	Status: Active Custom: Yes Class: WORKFLOW Format: PDF	Created: 8/5/2021 Created By: Kirk Foster Revised: 8/5/2021 Revised By: Kirk Foster
#6 GSA Report	Status: Active	Created: 8/5/2021

Constituent Savings Report by Agency
Constituent Savings Report by Agency on Closed Service Records.
Created 10/19/2016 (by IQ Support)
Revised 2/3/2021 (e)

General **Schedule**

Custom: Yes
Criteria Page: SQL Builder
Output Format: Microsoft Excel

Run Report

4. The Report Criteria window for that report will open. Complete the form as necessary and email or run the report.

Report Criteria

Constituent Savings Report by Agency

Start Date: mm/dd/yyyy

End Date: mm/dd/yyyy

Agency

Users

Output To: Microsoft Excel (Limited Formatting)

Email Report

ID#WORKFLOW_CONSTITUTENT SAVING... Row 2

Run Report Close

Setting Up Recurring Reports

1. Follow steps 1-3 above.
2. On the Report Criteria Window, click on **Email Report**.
3. Choose when to email the report and who will be receiving it. Click **Email Report**.
4. The report will now email as you selected and in the Reading Pane, there will appear a **Job ID** showing the scheduled email send. Click on the **Job ID**.
5. Click **Edit**. Check the box that says **Recurring**.
6. Select the following fields to set up the Recurring Report:
 - a. **Repeat**: How often should the report run.
 - b. **Every**: Select a number to indicate the frequency of the report, such as the number “1” for every week or month. Check the box next to the day of the week the report will be generated as well.
 - c. **Run Indefinitely**: Check if you want IQ to continue to generate this recurring report for you nonstop, or select an End Date to tell IQ when to end the Recurring Report.
 - d. **Calculating Report Date**: Choose what set of dates, such as “Current Week” for IQ to base the reports Data on.
7. Click into the **Alert Option** dropdown and select Completion, so you can be alerted once the report has finished running.

Edit Background Job

Background Job 2701768

Correspondence Summary Report

5

☒ Recurring

6

Frequency

Repeat

A Weekly

Every

B 1

week(s) on:

☐ Sun

☐ Mon

☐ Tue

☐ Wed

☐ Thu

☒ Fri

☐ Sat

C

☒ Run Indefinitely

D

Calculating Report Date

Current Week

Alert Option

7 None

ID#2701768

Row 1

Save & Close

Save

Close