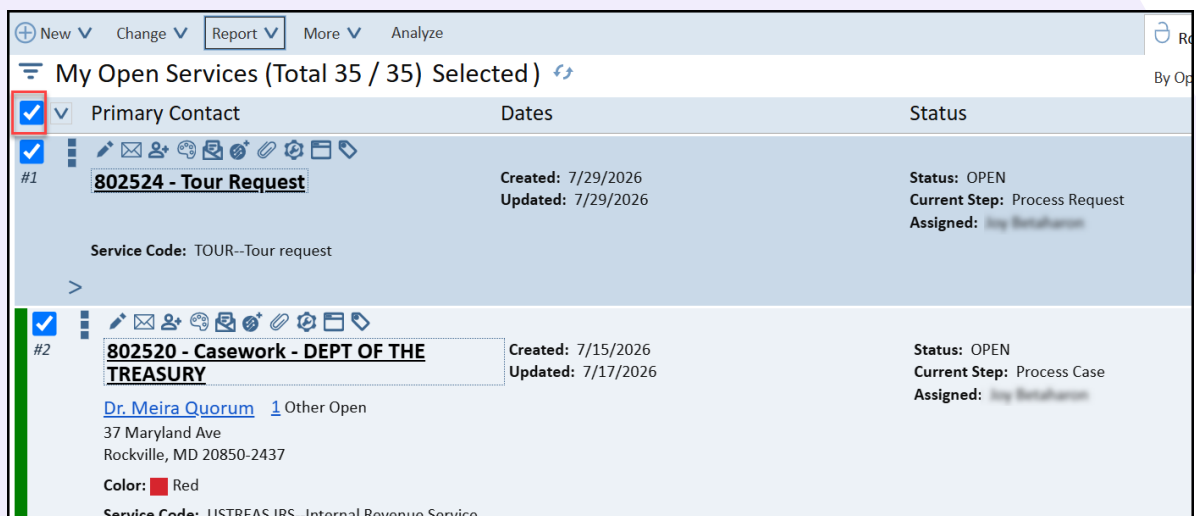


Running the Executive & Service Summary Reports

Market: House, Senate

Description: This guide provides instructions on how to run the Executive & Service Summary Reports from the Services application.

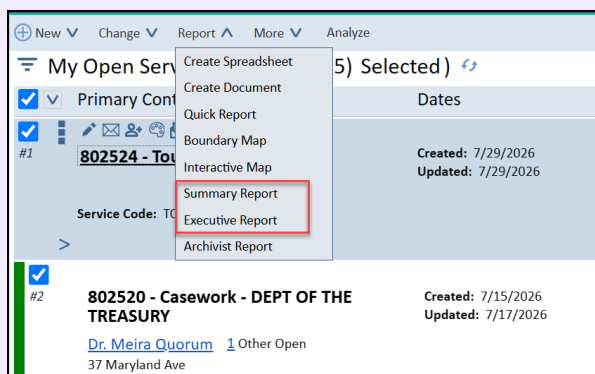
1. Navigate to **Services** → **My Open Services** view. Select the intended service records by clicking the box next to the service names or select all.



The screenshot shows the 'My Open Services' view with a table of service records. The first record, '802524 - Tour Request', is selected. The second record, '802520 - Casework - DEPT OF THE TREASURY', is also visible. The 'Report' button is highlighted in the top navigation bar.

Primary Contact	Dates	Status
#1 802524 - Tour Request Service Code: TOUR--Tour request	Created: 7/29/2026 Updated: 7/29/2026	Status: OPEN Current Step: Process Request Assigned: [Name]
#2 802520 - Casework - DEPT OF THE TREASURY Dr. Meira Quorum 1 Other Open 37 Maryland Ave Rockville, MD 20850-2437 Color: Red Service Code: USTREAS IRS--Internal Revenue Service	Created: 7/15/2026 Updated: 7/17/2026	Status: OPEN Current Step: Process Case Assigned: [Name]

2. Select **Report** → **Summary Report**.

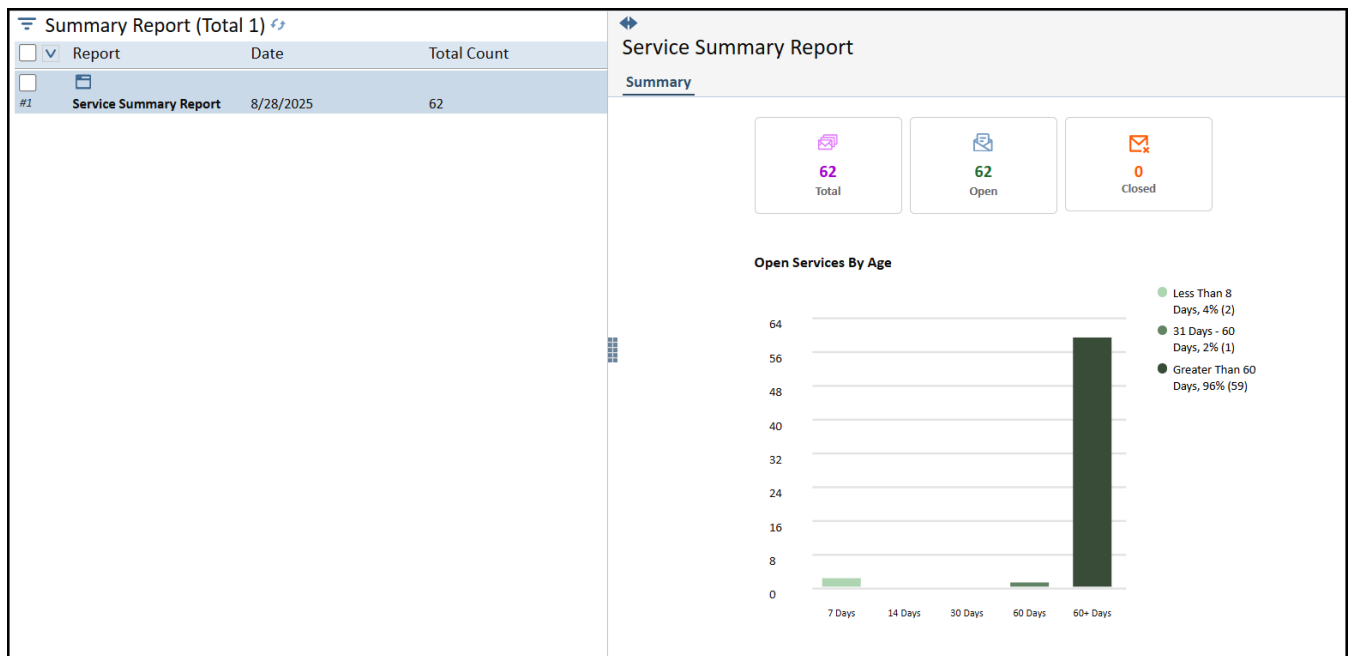


The screenshot shows the 'My Open Services' view with the 'Report' dropdown menu open. The 'Summary Report' option is highlighted.

Primary Contact	Dates	Status
#1 802524 - Tour Request Service Code: TOUR--Tour request	Created: 7/29/2026 Updated: 7/29/2026	Status: OPEN Current Step: Process Request Assigned: [Name]
#2 802520 - Casework - DEPT OF THE TREASURY Dr. Meira Quorum 1 Other Open 37 Maryland Ave Rockville, MD 20850-2437	Created: 7/15/2026 Updated: 7/17/2026	Status: OPEN Current Step: Process Case Assigned: [Name]

3. IQ will process the request and present either report selected (note that for the Executive Summary you will need to select the start and end dates).

Service Summary Report:



Executive Summary Report:

