

Reporting Options for Counseling Meetings

Last Modified on 10/21/2024 8:21 am CDT

Classic View: Student Information > Counseling > Meetings > Report

Search Terms: Counseling, Meetings

Use the **Report** option to generate a summary of meetings. The results in a report are determined in two ways:

- The filtering options chosen for the calendar.
- The options selected in the report editor.

This report is also available in the Student Information reports. That version of the report gives you the option to select an Ad hoc Filter to report based off of, and to select any individual or group, beyond those who are in your caseload or in the Counseling staff.

New Meeting	Refresh Print Calendar Report	
Counseling	Meetings	Participan
Today	Meeting Report	_
All Day	A printable report of meetings that spans any period of time can be generated by making a selection bell and clicking the Generate button. Any filtering options currently selected on your calendar will be applied the report.	
7AM	Start Date End Date	_
8AM	05/05/2019 to 05/11/2019	- 1
OAM	Sort By Date (ascending) ▼	- 1
9AM	✓ Print Details	
10AM	Report Format: PDF V	
11AM		s
	Meeting Report Editor	

Generate a Meetings Report

- 1. Select the filtering options to customize your view of your calendar.
- 2. Click Report.
- 3. Enter a **Start** and **End Date** to determine which meetings should be included in the report. The default dates reflect your current view of the calendar.
- 4. Indicate how the report should be grouped in the **Sort By** option, which show meetings that match report criteria as follows:



- *Date ascending/descending* lists meetings in chronological order.
- *Person* lists all participants in any of the reported meetings, how many meetings they were involved in, and a list of those meetings. In addition to basic or detail information (as indicated), Invited, Attended and Role also report. Each meeting reports for each one if its participants, so this format may take a little longer to generate than the others.
- *Purpose* lists all purposes in any of the reported meetings, a count of how many meetings have that purpose, and a list of each meeting with that purpose. Meetings that do not have a purpose are listed at the end of the report.
- *Outcome* lists all outcomes in any of the reported meetings, a count of how many meetings have that outcome, and a list of each meeting with that outcome. Meetings that do not have a outcome are listed at the end of the report.
- *Location* lists all locations of any of the reported meetings, a count of how many meetings have that location, and a list of each meeting in that location. Meetings that do not have a location are listed at the end of the report.
- 5. Indicate if the report should include **Details** by leaving the **Print Details** checkbox marked. Unmark this checkbox to only include basic information about each meeting.
- 6. Select a **Report Format** from the dropdown. Available options include: PDF or DOCX.
- 7. Click **Generate** to view the report in a new window.

The report generates with a summary of the filter and report options at the top, followed by a list of all meetings that meet those parameters.

Basic information includes Start Date and Time, Title, Location and Owner, in addition to counts based on the Sort By option selected. If **Print Details** is marked, the Purpose, Outcome, and Participants also report.

Generated on 0 Page 1 of 2	3/20/2014 12:18	0.08 PM	Meeting Report	User: Administration, Administratio Meetings Administrator for: Counseli
Report Option:				
Module:	s Counse	ling		
Date Rande:		n 3/9/2014 and 3/9/2014		
Participants:	Me			
Participation:		or Invited		
Role:	Any			
Purpose:	Any			
Outcome:	Any			
Location:	Any			
Sort By:	Date (a:	scending)		
Print Details:	Yes			
Total number o	of results (distin	ict meetings): 16		
	of results (distin Time	at meetings): 16 Title	Location	Owner
Date			Location Counseling Offi	
Date 03/10/2014 Purposes : Beh	Time 08:00 AM	Title		
Date 03/10/2014 Purposes: Beh Outcomes:	Time 08:00 AM avior (B)	Title Parent Meeting	Counseling Offi	
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4	Time 08:00 AM avior (B)): Administration	Title Parent Meeting Administration, Brenda Student		ces Administration, Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014	Time 08:00 AM avior (B)): Administration 10:00 AM	Title Parent Meeting Adm histration, Brenda Student College Check In	Counseling Offi	
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling	Title Parent Meeting Adm histration, Brenda Student College Check In	Counseling Offi	ces Administration, Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll Outcomes: (Fl	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)	Title Parent Meeting Administration, Brenda Student College Check In (CC)	Counseling Offi	ces Administration, Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll Outcomes: (Fl Participants (2	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration	Title Parent Meeting Administration, Brenda Student College Check In (CC) Administration, Andrew Thomas	Counseling Offi , Johanna Grace Student, Tom Student s Student,	ces Administration, Administration Administration, Administration
Date 03/10/2014 Purposes: Beh 03/10/2014 Purposes: Coll Outcomes: (FU Participants (2 03/11/2014	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM	Title Parent Meeting Administration, Brenda Student College Check In (CC)	Counseling Offi	ces Administration, Administration Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll Outcomes: (Fl Participants (2	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM	Title Parent Meeting Administration, Brenda Student College Check In (CC) Administration, Andrew Thomas	Counseling Offi , Johanna Grace Student, Tom Student s Student,	ces Administration, Administration Administration, Administration
Date 03/10/2014 Purposes: Beh Participants (4 03/10/2014 Purposes: Coli Outcomes: (FI Participants (2 03/11/2014 Purposes: Beh Outcomes:	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM avior (B)	Title Parent Meeting Adm histration, Brenda Student College Check In (CC) Adm histration, Andrew Thomas Behavior Referral Review	Counseling Offi , Johanna Grace Student, Tom Student s Student,	ces Administration, Administration Administration, Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll Outcomes: (FI Participants (2 03/11/2014 Purposes: Beh	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM avior (B)	Title Parent Meeting Adm histration, Brenda Student College Check In (CC) Adm histration, Andrew Thomas Behavior Referral Review	Counseling Offi , Johanna Grace Student, Tom Student s Student, Counseling Offi	ces Administration, Administration Administration, Administration
Date 03/10/2014 Purposes: Beh Outcomes: Participants (4 03/10/2014 Purposes: Coll Outcomes: (Ft Participants (2 03/11/2014 Purposes: Beh Outcomes: Participants (1 03/12/2014 Purposes: Ger	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM avior (B)): Administration 03:00 PM	Title Parent Meeting Administration, Brenda Student College Check In (CC) Administration, Andrew Thoma: Behavior Referral Review	Counseling Offi , Johanna Grace Student, Tom Student s Student, Counseling Offi	ces Administration, Administration Administration, Administration ces Administration, Administration
Date 03/10/2014 Purposes: Beh 0utcomes: Participants (4 03/10/2014 Purposes: Coll 0utcomes: (FI Participants (2 03/11/2014 Purposes: Ger Outcomes: Purposes: Ger Outcomes:	Time 08:00 AM avior (B)): Administration 10:00 AM ege Counseling JM)): Administration 12:00 PM avior (B)): Administration 03:00 PM ieral (G)	Title Parent Meeting Administration, Brenda Student College Check In (CC) Administration, Andrew Thoma: Behavior Referral Review	Counseling Offi , Johanna Grace Student, Tom Student s Student, Counseling Offi	ces Administration, Administration Administration, Administration ces Administration, Administration Administration, Administration Administration, Administration

