

Meeting Report

Last Modified on 10/21/2024 8:19 am CDT

Tool Search: Meeting Report

The Meeting Report provides detailed or summary information about counseling [meetings](#), based on the options selected.

This report is also available from the Meetings [calendar](#).

Meeting Report

This report lists detailed information about meetings. After selecting criteria below, a report will be generated listing meetings which match your selections.

For modules of which you are a Meetings Administrator, all meetings in that module will be included in the report. Otherwise, only meetings that you own or are an invited participant on will be included. Note: For non-administrators, only meetings you own will be included when filtering or sorting by outcome.

The report will be sorted by the option selected below.

You are a Meetings Administrator for the following modules: Counseling.

Module

Date Range

Participants

- Anyone
- Me
- Ad Hoc Filter
- Person

Participation

- Owner
- Attended
- Invited
- Participant Only

Role

- Any
- Selected

Purpose

- Any
- Selected

Outcome

- Any
- Selected

Location

- Any
- Selected

Sort By

Print Details

Report Format

Image 1: Meeting Report

Access to this report is determined by your [tool rights](#). If you have the meeting administrator tool rights, you can view all meetings in this report. Otherwise, only meetings where you are the owner or an invited participant report.

Meetings are created in the Meetings tool in the Counseling module. See the [Schedule Counseling Meetings](#) and [View Your Counseling Meetings Calendar](#) articles for more information about using this tool.

Generate the Meeting Report

1. Currently, the only **Module** with Meetings tool is *Counseling*, so this option is selected by default.
2. Enter a **Date Range** to report meetings scheduled within that range.
3. The **Participants** options determine which meetings to report based on whether the selected individual(s) is a participant in the meeting. Select one of the following options:
 - *Anyone* - reports all meetings you have rights to view, regardless of participants.
 - *Me* - reports all meetings in which the current user is listed as a participant.
 - *Ad hoc Filter* - reports all meetings that include any of the individuals in the selected Ad hoc Filter as a participant. Filters are created in [Ad hoc Reporting](#) or the Meetings Participant List.
 - *Person* - reports all meetings that include the entered individuals(s) as a participant. To enter people, click the text box and start typing a name. Search results display with the type of person indicated (Student, Staff, Other).
4. The **Participation** option refers to the Participants already selected. All meetings report that include both the selected participant(s) and participation type. Options are:
 - *Owner* - The organizer of the meeting, not necessarily the creator of the meeting.
 - *Attended* - Participant marked as having attended the meeting.
 - *Invited* - Participant marked as having been invited to the meeting.
 - *Participant Only* - Participant is included in the Participant List, but is not invited and did not attend. For example, this option is used for a meeting that is about a student, but the student does not attend.
5. If desired, select a **Role** by marking *Selected* and then clicking the text box. A list of Role options display. All meetings in which one of the selected Participants has the entered Role(s) selected report.
6. If desired, select a **Purpose** by marking *Selected* and then clicking the text box. A list of Purpose options displays, describing the reason the meeting was scheduled. Select multiple purposes to report any meeting that has any of the selected purposes.
7. If desired, select an **Outcome** by marking *Selected* and then clicking the text box. A list of Outcome options displays, describing the result of the meeting. Select multiple outcomes to report any meeting that has any of the selected outcomes.
8. If desired, select a **Location** by marking *Selected* and then clicking the text box. A list of Location options displays, describing where the meeting was scheduled. Select multiple locations to report any meeting that has any of the selected locations.
9. 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 of 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.
10. If the **Print Details** checkbox is left marked, the report includes all Purpose, Outcome, and Participants for each meeting, in addition to basic information. Unmark this checkbox to only report Date, Time, Title, Location, and Owner.
 11. Select a **Report Format** from the dropdown. Available options include: PDF or DOCX.
 12. Click **Generate** to open the report in a new window.

Generated on 03/20/2014 12:18:08 PM Page 1 of 2		Meeting Report		User: Administration, Administration Meetings Administrator for: Counseling
Report Options				
Module:	Counseling			
Date Range:	Between 3/9/2014 and 3/9/2014			
Participants:	Me			
Participation:	Owner or Invited			
Role:	Any			
Purpose:	Any			
Outcome:	Any			
Location:	Any			
Sort By:	Date (ascending)			
Print Details:	Yes			
Total number of results (distinct meetings): 16				
Date	Time	Title	Location	Owner
03/10/2014	08:00 AM	Parent Meeting	Counseling Offices	Administration, Administration
Purposes: Behavior (B)				
Outcomes:				
Participants (4): Administration Administration, Brenda Student, Johanna Grace Student, Tom Student				
03/10/2014	10:00 AM	College Check In		Administration, Administration
Purposes: College Counseling (CC)				
Outcomes: (FUM)				
Participants (2): Administration Administration, Andrew Thomas Student,				
03/11/2014	12:00 PM	Behavior Referral Review	Counseling Offices	Administration, Administration
Purposes: Behavior (B)				
Outcomes:				
Participants (1): Administration Administration				
03/12/2014	03:00 PM	Student Advocacy Group Meeting	Room 123	Administration, Administration
Purposes: General (G)				
Outcomes:				
Participants (5): Administration Administration, Andrew Thomas Student, Bree W Student, Brooke Jane Student, Devin L Student				

Image 2: Report Example