Reporting Options for Counseling Meetings

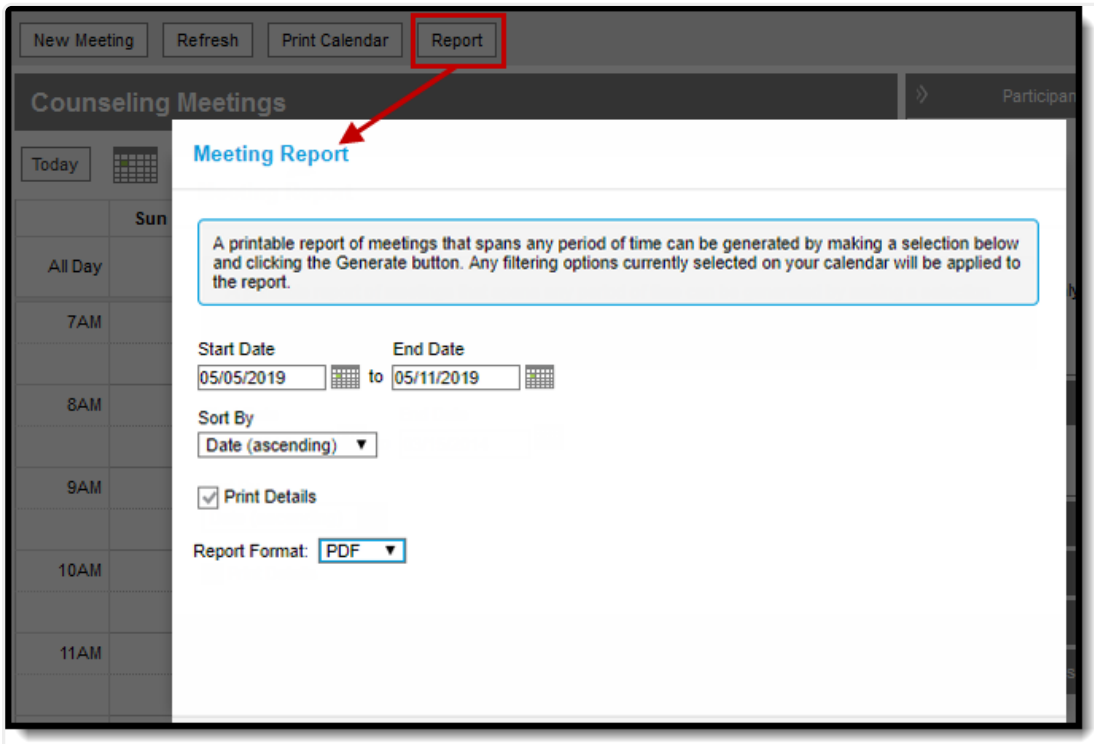
Last Modified on 07/30/2026 11:41 am CDT

Tool Search: 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.



Meeting Report Editor

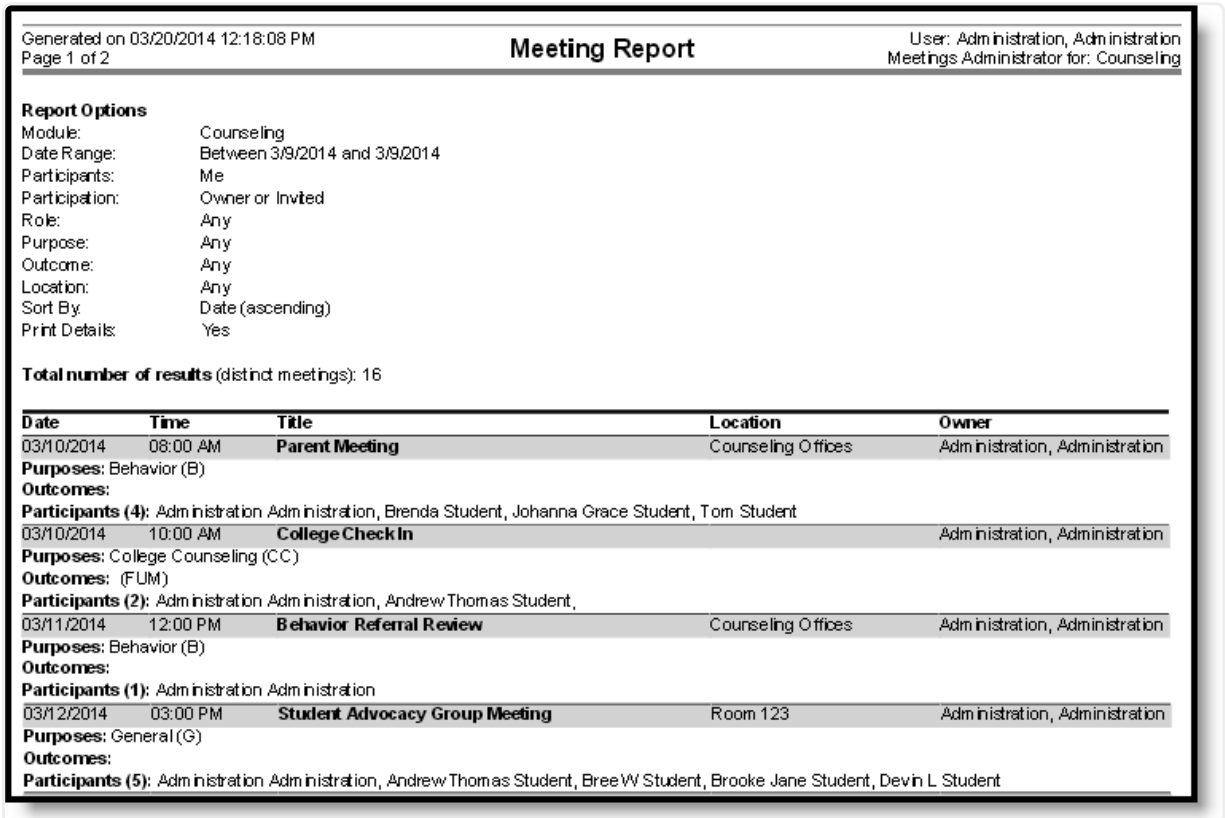
Generate a Meetings Report

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 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				

Meeting Report Example