

E-School Counselor Quarterly Reports for Contacts

Counselor Contact Screen (by Month)

To calculate your total counts for each quarter, you will need to first calculate for each month and then add the totals (at least until we have a better way to do this!).

The initial search:

SEARCH FORM

Favorites:
Custom Search Name:

Custom Search Criteria

And/Or	Area	Field Name	Condition	Value	Delete
	Demographic	BUILDING	= (equals)	330354	<input type="checkbox"/>
And	DOE Counselor Contact	Date	is in month	09	<input type="checkbox"/>
And	DOE Counselor Contact	Date	is in year	2006	<input type="checkbox"/>
And					<input type="checkbox"/>

List Field Display Selection
 Default Custom

Area	Field Name	Delete
DOE Counselor Contact	Date	<input type="checkbox"/>
DOE Counselor Contact	Contact Type	<input type="checkbox"/>
Personal	ETHNIC CODE	<input type="checkbox"/>

Once you enter the fields as above (using your own building number), click on SEARCH.

A list will appear on the screen of all contacts entered that month; to export this to Excel, click on "REPORT" and select the radio button that says "Excel". Sort and Break Up the entries as shows below and click on "RUN."

Student List Report

Report Options
Output Format: PDF Excel

Sort and Break Setup

Table	Column	Sort Order	Break	Delete
DOE Counselor Contact	Contact Type	Ascending	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>

TURN OVER TO VIEW ADDITIONAL INSTRUCTIONS

To Identify Total Count for Each Ethnicity:

Open your Excel document that you saved from the search. Click in the empty box in the upper left hand corner of the spreadsheet to select all of the cells. Once all cells are highlighted go to the “Data” drop down and select “Subtotals.” A warning box will pop up notifying you that it is not sure which data you want to select, click on “OK.”

	A	B	C	D	E	F	G
1							
3	Student ID	Student Name	Date	Contact Type	Ethnic Code		
4	000000	Name 1	9/29/2006	CI	White		
5	111111	Name 2	9/29/2006	CI	Hispanic		
6	222222	Name 3	9/22/2006	P	White		
7	333333	Name 4	9/29/2006	P	Black		
8	444444	Name 5	9/22/2006	PSC	White		
9	555555	Name 6	9/27/2006	PSC	Black		
10	666666	Name 7					
11	777777	Name 8					
12	888888	Name 9					
13							
14							
15							
16							
17							
18							
19							
20							

Microsoft Excel

Microsoft Office Excel cannot determine which row in your list or selection contains column labels, which are required for this command.

- If you want the first row of the selection or list used as labels and not as data, click OK.
- If you selected a subset of cells in error, select a single cell, and try the command again.
- To create column labels, click Cancel, and enter a text label at the top of each column of data.
- For information about creating labels that are easy to detect, click Help.

OK Cancel Help

Once you click “OK”, a new box will pop up asking how you want to sort, complete that box as shown below and click on “OK” again.

Subtotal

At each change in:
(Column E)

Use function:
Count

Add subtotal to:
 (Column C)
 (Column D)
 (Column E)

Replace current subtotals
 Page break between groups
 Summary below data

Remove All OK Cancel

You should now see a series of breaks between each ethnicity with a subtotal for each as well as a grand total.

TURN TO NEXT PAGE FOR ADDITIONAL INSTRUCTIONS

To Identify Total Count by Each Contact Type:

After completing the count by ethnicity, go to the Edit drop down menu and click on “Undo.” Now, go back to the “Data” drop down and click on “Subtotal” again. This time, use the fields as shown below to get subtotals. When you click okay, it will now give you a subtotal break after each set of Contact Types. This will allow you to get your total counts for Academic, Career, Personal/Social, and Crisis Intervention.

