



# ATHENA ADVANCED REPORTS

Education Logistics, Inc.

Training  
Guide

2025



# Athena Advanced Reports

## Training Guide

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## INTRODUCTION

The Athena Advanced Reports Training Guide will provide you with explanations of the basic tools within Athena, and walk you through the spaces specific to the Advanced Report Modules within the software. It will walk you through the basic layout, universal tool, and process that exist within all Advanced reporting modules to help you get started in the application.

## PURPOSE

This document introduces users to the unique layout of the Athena Advanced Reporting modules. These modules stand out for their ability to give users independent control over report layout and design. With the integration of Jasper—a custom Graphical User Interface (GUI)—users can further customize visual elements of standard Athena reports. The Jasper design tool allows users to create new reporting templates, preview them, delete, and modify report components.

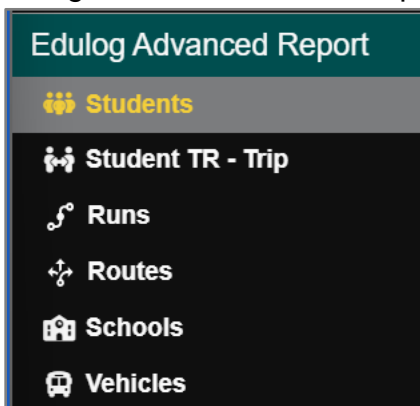
In addition to the enhanced design capabilities, users will find the same reporting modules and fields available in the Advanced Reporting section as in the Standard Reports. This ensures that any report created in the Standard Reports can be recreated and further tailored to meet the unique needs of clients within the Advanced Reporting modules.

## NAVIGATING THE ADVANCED REPORTS MODULE

1. Navigate into the Routing Management application.



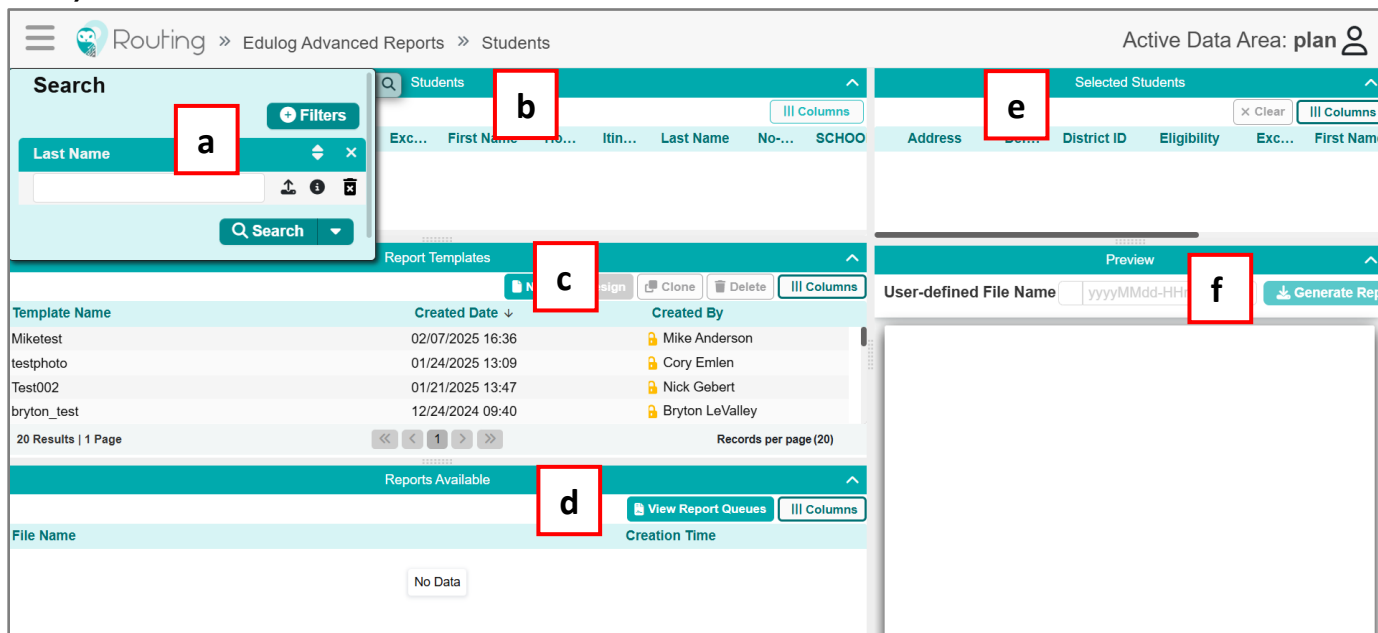
2. Navigate into the Student reporting module within the Advanced Report section of the main menu.



### 3. Advanced Reporting Layout:

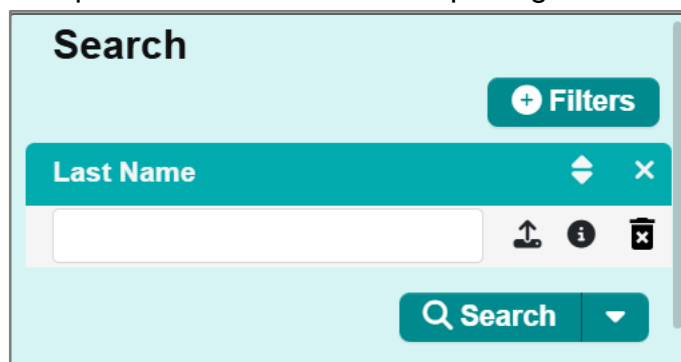
Within all advanced reporting modules, users will find same cards and tools within the reporting space:

- a.) Search Tray
- b.) Queried Data {Students}
- c.) Report Templates
- d.) Reports Available
- e.) Selected {Students}
- f.) Preview



#### 3.1. Search Tray:

Within the search tray, users can search for the desired data by selecting or combining multiple filters to best fit their reporting criteria.



#### 3.2. Queried Data – Students Card:

The results of a user's search criteria set within the search tray will populate in the data card. The card's name will correspond to the Advanced Reporting module being used—in the example above, this is reflected by the "Students" card.

Students									
14103 Results		<< < 1 2 3 4 5 6 7 8 > >>						706 Pages	
<input type="checkbox"/>	Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...	Last
<input type="checkbox"/>	214 S STAT...		14031857	Out of area	×	STUDENT	✓	×	1
<input type="checkbox"/>	1617 E Bro...		14031858	Out of area	×	STUDENT	✓	×	2
<input type="checkbox"/>	306 S STAT...		14031859	Out of area	×	STUDENT	✓	×	3
<input type="checkbox"/>	1123 S 7 ST... ✓			Eligible	×	Edulog	×	×	5
<input type="checkbox"/>	1123 S 7 ST... ✓			Eligible	×	Edulog	×	×	6

### 3.3. Report Templates:

The Reports Templates card will display all previously created reporting templates, as well as provide additional tools to create new templates, and edit existing templates.

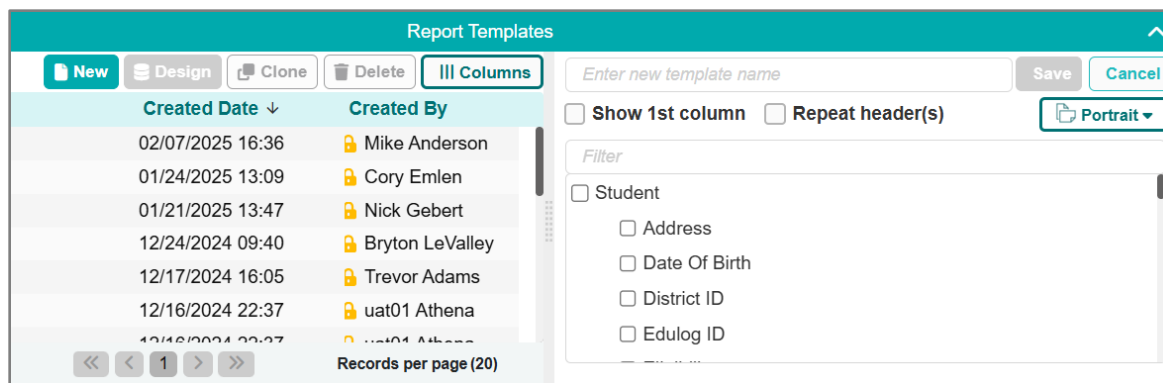
Report Templates		
<div> <div>New</div> <div>Design</div> <div>Clone</div> <div>Delete</div> <div>Columns</div> </div>		
Template Name	Created Date ↓	Created By
Miketest	02/07/2025 16:36	🔒 Mike Anderson
testphoto	01/24/2025 13:09	🔒 Cory Emlen
Test002	01/21/2025 13:47	🔒 Nick Gebert
bryton_test	12/24/2024 09:40	🔒 Bryton LeValley
dasdfdfdfsfasddfs	12/17/2024 16:05	🔒 Trevor Adams
test_001_clone	12/16/2024 22:37	🔒 uat01 Athena

**Note:** All previously created templates within the Report Templates card will have either a gold or teal lock next to the creator's name. A template with a gold "locked" icon can only be edited by the creator, while a template with a green "unlocked" icon is editable by all users.

#### a.) New:

The “New” tool allows the user to create a new reporting template. Once selected the user will see a new column populate within the Report Templates card, where the user can select the fields they would like to see appear in the report.





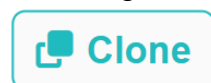
#### b.) Design:

The "Design" tool can be used once a template is "unlocked." After selecting it, the user will be directed to a pop-out window where they can further customize elements of the report to their preferences.



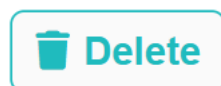
#### c.) Clone:

Clone a locked template to replicate the selected fields, and allow the user to access the design features to further tailor it to their needs.



#### d.) Delete:

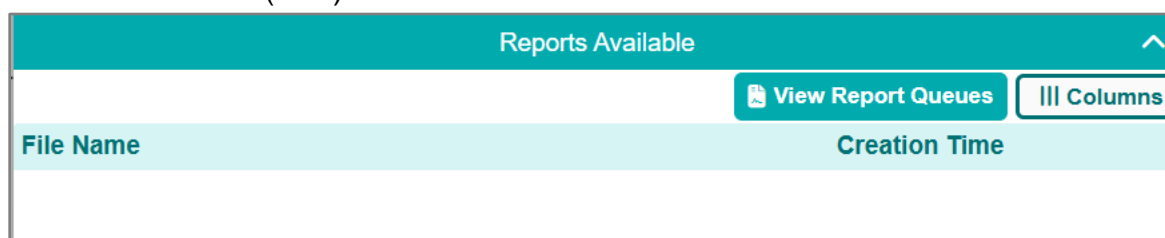
The "Delete" tool allows the user to delete unlocked templates.



### 3.4. Reports Available:

Successfully generated reports will be display in the Report Available card with the following information:

- File Name
- Creation Time
- Download (icon)



Additionally, the "View Report Queues" tool allows users to view scheduled report information.

### 3.5. Selected Card – Selected Students:

Data selected within the data card (Ex: Students Card), will be displayed within the “Selected” card.

Selected Students							
				<a href="#">X Clear</a>		<a href="#">Columns</a>	
	Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...
>	214 S STAT...		14031857	Out of area	X	STUDENT	✓
>	1617 E Bro...		14031858	Out of area	X	STUDENT	✓
>	306 S STAT...		14031859	Out of area	X	STUDENT	✓


### 3.6. Preview:

The Preview window will display the formatting of the template that was selected within the Report Templates.

Preview

User-defined File Name   [Generate Report](#)

Student Report

Photo	Address	District ID	EduLog ID
	999 21ST AVE	000000437370	62436



# ATHENA ADVANCED REPORTS USER STORIES

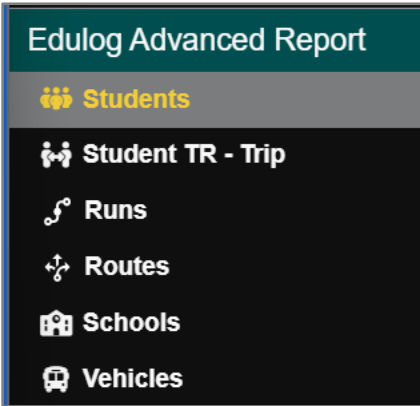
The User Stories section of this guide will offer you scenarios that are applicable to some of the workflows you might encounter in your day-to-day tasks within Athena. Some scenarios that will be discussed include:

- [Create a New Template](#)
- [Clone a Template](#)

## Create a New Template

Here’s How:

1. Navigate into the Advanced Student Reporting Module.



2. Within the Report Templates card, select “New”.

Report Templates		
<div><div>New</div><div>Design</div><div>Clone</div><div>Delete</div><div>Columns</div></div>		
Template Name	Created Date ↓	Created By
Miketest	02/07/2025 16:36	Mike Anderson
testphoto	01/24/2025 13:09	Cory Emlen
Test002	01/21/2025 13:47	Nick Gebert
bryton_test	12/24/2024 09:40	Bryton LeValley
dasdfdfdfsfasddfs	12/17/2024 16:05	Trevor Adams
test_001_clone	12/16/2024 22:37	uat01 Athena
test_001	12/16/2024 22:37	uat01 Athena
20 Results   1 Page		Records per page (20)

3. Within the new column, select the following reporting fields to be included in your template:

- School
- Grade
- Last Name
- First Name
- Eligibility

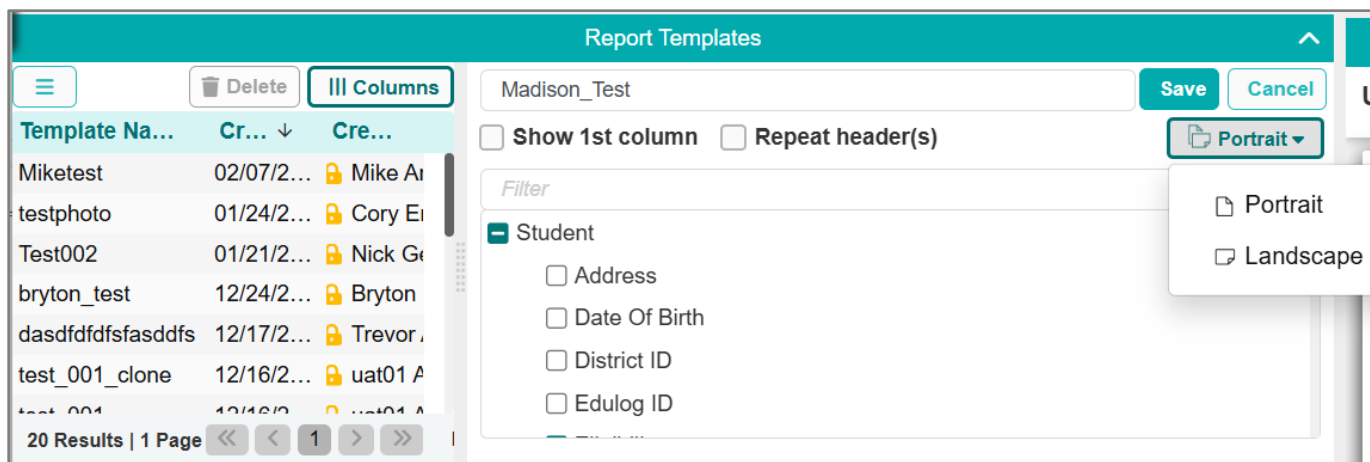
The screenshot shows the 'Report Templates' interface. On the left, a table lists templates with columns 'Template Name', 'Created', and 'Created By'. The table shows 20 results on page 1. On the right, a configuration panel is visible. It includes a text input for 'Enter new template name', 'Save' and 'Cancel' buttons, and checkboxes for 'Show 1st column' and 'Repeat header(s)'. A 'Portrait' dropdown menu is also present. Below these are 'Filter' and 'Student' sections with checkboxes for 'Address', 'Date Of Birth', 'District ID', and 'Edulog ID'.

4. Add an identifiable name for the template.

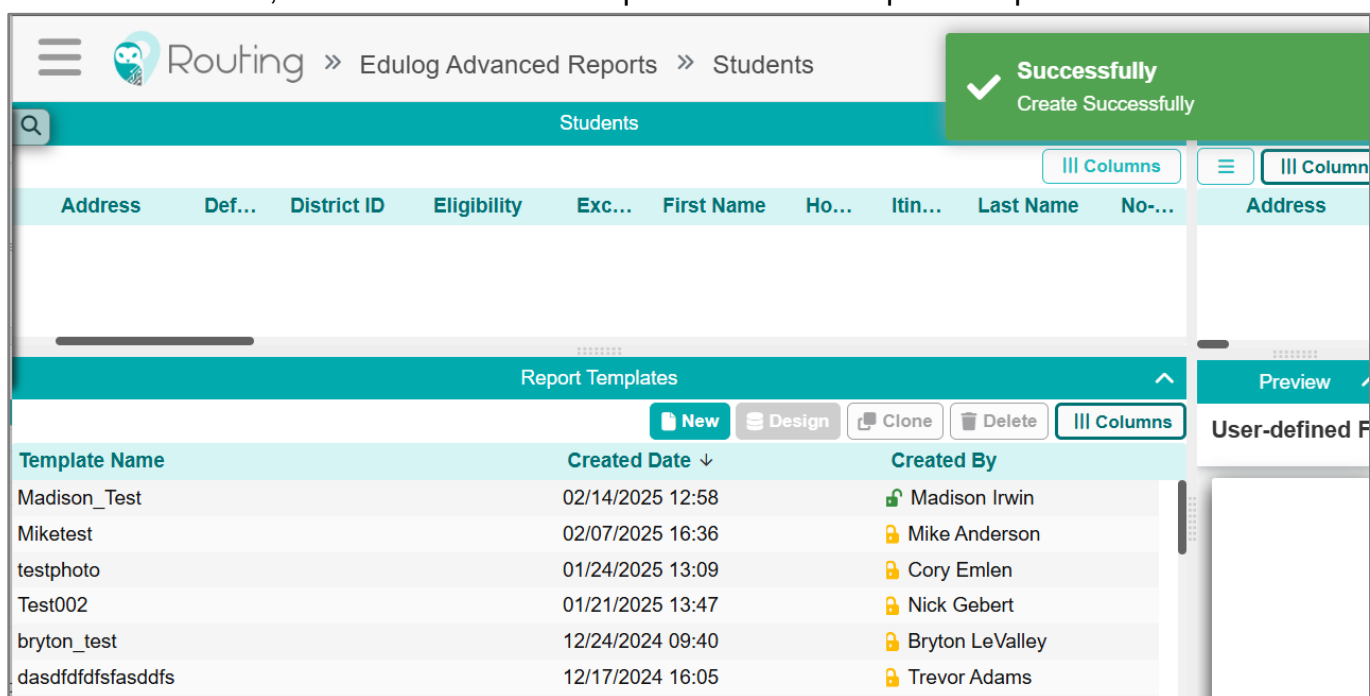
This screenshot is similar to the previous one, but the 'Enter new template name' field now contains the text 'Madison Test'. The 'Save' and 'Cancel' buttons are still present, along with the 'Portrait' dropdown and the configuration checkboxes.

5. Further tailor the template by selecting whether it should have/be the following:

- Enable to “Show 1<sup>st</sup> Column” on all pages
- Enable to “Repeat Headers” on all pages
- Choose whether the report will be a pdf or landscape layout



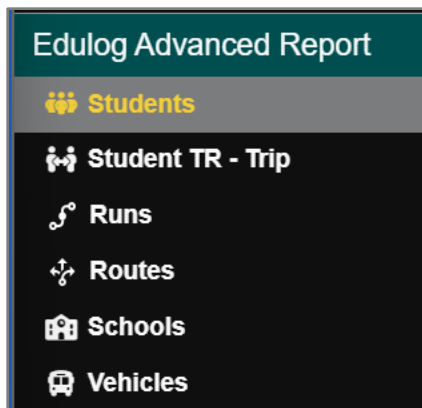
6. Save the additions, and view the saved template within the Report Templates card.



## Clone a Template

### Here's How:

1. Navigate into the Advanced Student Reporting Module.



2. Within the Report Templates card, select template you would like to duplicate.

Report Templates		
<div> <div>New</div> <div>Design</div> <div>Clone</div> <div>Delete</div> <div>Columns</div> </div>		
Template Name	Created Date ↓	Created By
Miketest	02/07/2025 16:36	Mike Anderson
testphoto	01/24/2025 13:09	Cory Emlen
Test002	01/21/2025 13:47	Nick Gebert
bryton_test	12/24/2024 09:40	Bryton LeValley
dasdfdfdfsfasdfs	12/17/2024 16:05	Trevor Adams
test_001_clone	12/16/2024 22:37	uat01 Athena
test_001	12/16/2024 22:37	uat01 Athena
20 Results   1 Page		Records per page (20)

3. Once the template is selected, select the “Clone” tool.

Routing

Edulog Advanced Reports > Students

Active Data Area: plan

Students

Columns

Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...	Las
---------	--------	-------------	-------------	--------	------------	-------	---------	-----

Report Templates

New

Design

Clone

Delete

Columns

Template Name	Created Date ↓	Created By
Madison_Test	02/14/2025 12:58	Madison Irwin
Miketest	02/07/2025 16:36	Mike Anderson
testphoto	01/24/2025 13:09	Cory Emlen
Test002	01/21/2025 13:47	Nick Gebert
bryton_test	12/24/2024 09:40	Bryton LeValley
dasdfdfdfsfasdfs	12/17/2024 16:05	Trevor Adams
test_001_clone	12/16/2024 22:37	uat01 Athena
test_001	12/16/2024 22:37	uat01 Athena

21 Results | 2 Pages

Reports Available

View Report Queues

Columns

Selected Students

Clear

Columns

Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...
---------	--------	-------------	-------------	--------	------------	-------	---------

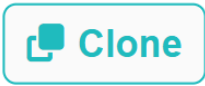
Preview

User-defined File Name: Default Sys: yyyyMMdd-HH:mm:ss

Generate Report

Student Report

District ID	Edulog ID	First Name
000000437370	62436	First



4. Provide the cloned template an identifiable name and select “Save”.

Report Templates

New

Design

Clone

Delete

Columns

Template Name	Created Date
Madison_Test	02/14/2025 12:58
Miketest	02/07/2025 16:36
testphoto	01/24/2025 13:09
Test002	01/21/2025 13:47
bryton_test	12/24/2024 09:40
dasdfdfdfsfasddfs	12/17/2024 16:05
test 001 clone	12/16/2024 22:27

21 Results | 2 Pages

<<

<

1

>

>>

Records per page (20)

Clone\_Test

Save

5. The user will see the following confirmation message, as well as the cloned template within the Report Template card.

Routing

Edulog Advanced Reports

Students

Students

Address

Def...

District ID

Eligibility

Exc...

First Name

Ho...

Itin...

Last

Report Templates

New

Design

Clone

Delete

Columns

Template Name	Created Date
Clone_Test	02/14/2025 14:47
Madison_Test	02/14/2025 12:58
Miketest	02/07/2025 16:36
testphoto	01/24/2025 13:09
Test002	01/21/2025 13:47
bryton_test	12/24/2024 09:40
dasdfdfdfsfasddfs	12/17/2024 16:05

22 Results | 2 Pages

<<

<

1

>

>>

Records per page (20)

Successfully

Clone Template Successfully

Selected

Clear

Columns

Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	It...
---------	--------	-------------	-------------	--------	------------	-------	-------

Preview

User-defined File Name

Default Sys

yyyyMMdd-HH:mm:ss

Generate Report

Student Report

District ID

Edulog ID

First Name

000000437370

62436

First