

# ATHENA STANDARD REPORTS

Education Logistics, Inc.

Training  
Guide

2025



# Athena Standard Reports

## Training Guide

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# PURPOSE OF THIS GUIDE

The Athena Reporting Training Guide will provide you with explanations of the basic reporting tools within Athena, walk you through the procedure of generating reports within the software, as well as provide you with specific scenarios you may encounter as you begin to independently navigate the system within the User Stories section of this guide.

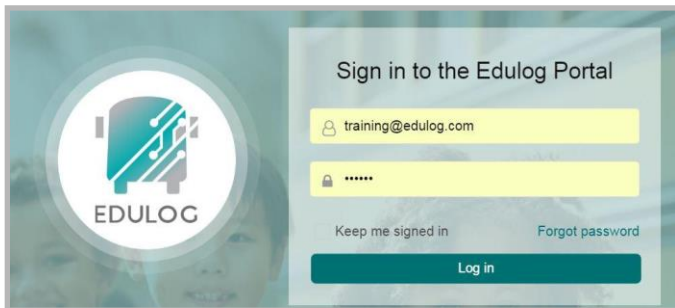
## ATHENA REPORTING INTRODUCTION

A variety of reports can be generated in the Athena software system. Through the Action Bar, users can locate multiple categories, or report types: Schools, Students, Runs, Routes, Vehicles and Student TR - Trips. The Reporting modules are arranged so users can easily identify and organize the information needed in the report. First, select a file type: PDF or CSV. Then configure the fields you want in your report. Once configured, you have the ability to generate the report for printing or digital sharing.

## NAVIGATING REPORTING MODULES

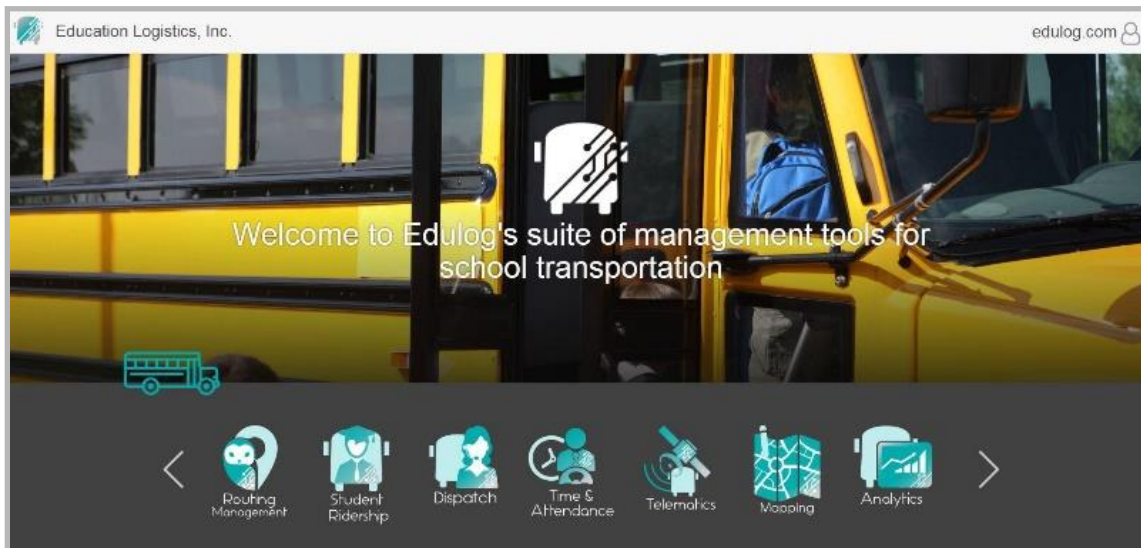
### 1. Sign In

You will first be brought to the Sign In page where you will enter your Username (email), and Password.



### 2. Athena Portal Home Page

Once logged in, you will be directed to the Athena Portal Home Page.



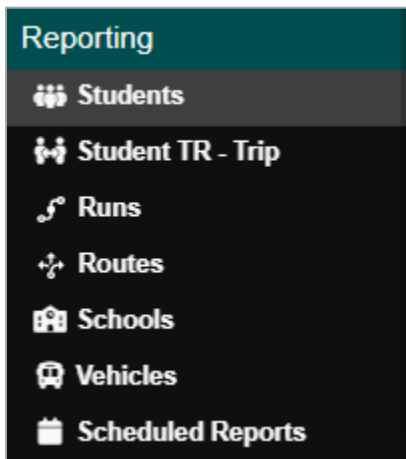
### 3. Routing Management

To access Athena standard reports, select Routing Management, the Athena owl.



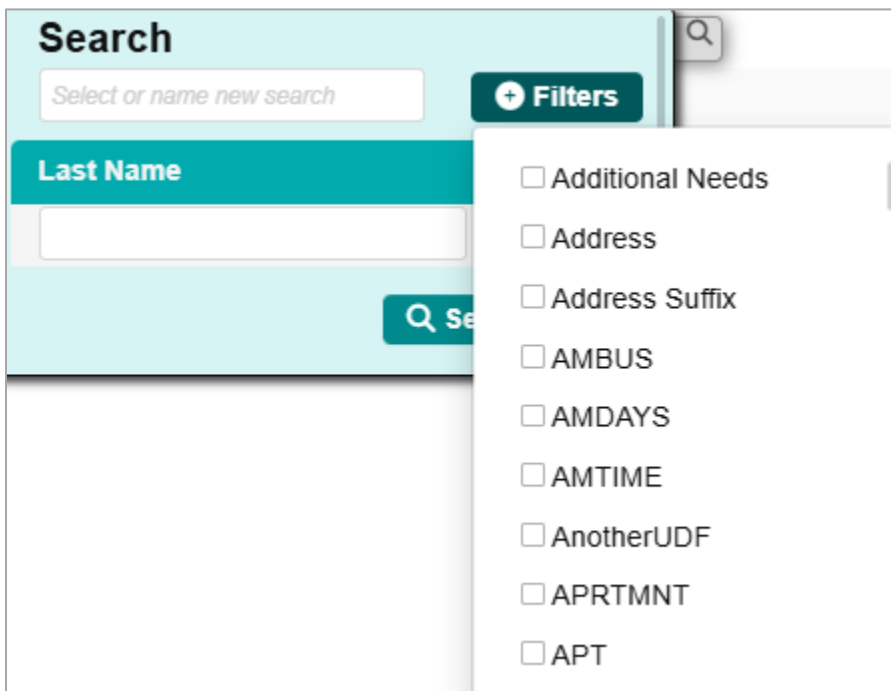
### 4. Reporting Modules

Under Reporting, select a report of your choosing. For this example, we will create a Student report.

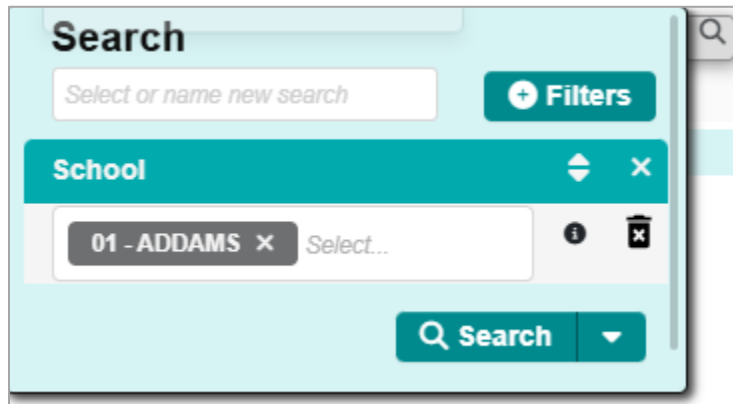


### 5. Reports Search Tray

The Search Tray will appear, and you will have the option between several different filters. Scroll down and select the "School" filter.

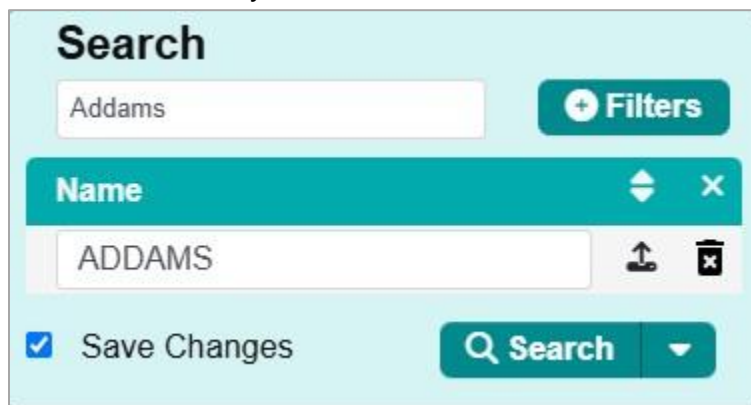


- Enter the school's name in the search field or select the school from the drop-down menu. Then select Search.



The screenshot shows a 'Search' panel with a light blue header. Below the header is a text input field with the placeholder 'Select or name new search' and a '+ Filters' button. A teal bar labeled 'School' is active, containing a dropdown menu with '01 - ADDAMS' selected and a 'Select...' button. To the right of the dropdown are an information icon and a trash icon. At the bottom of the panel is a 'Search' button with a magnifying glass icon and a dropdown arrow.

- You can save your Filter search condition by entering a name in the 'Search or name new search' field and make sure the Save Changes box is selected. This will save your filter search condition and may enter the name in this box later and the search filters will load.



This screenshot shows the 'Search' panel with the 'Name' filter selected in the teal bar. The text input field now contains 'Addams'. The dropdown menu shows 'ADDAMS' with an 'Add' icon and a trash icon. The 'Save Changes' checkbox is checked. The 'Search' button remains at the bottom.

- Once your search is completed, close the search tray using the tab.



## 6. Reports Data

Students will be listed in the Data Panel, and when students are selected, they will also appear in the Workspace Panel under the Selected Students card.

Routing » Reporting » Students Active Data Area: plan

392 Results 20 Pages

Last Name	First Name	Address	School	Grade	Prog
ABRAMS, 01	CARRIE	310 E Jefferson ST, 62561	01 - ADDAMS	01	DF
ABRAHAM	EVA	401 CLIPPER RD	01 - ADDAMS	01	DF
ABODUNRIN	HANNAH	2629 W LAWRENCE AVE	01 - ADDAMS	01	DF
ABITOGUN, 10	KOLADE	80 LOCKSLEY LN	01 - ADDAMS	01	DF
ABITOGUN, 03	KAYODE	1737 W ILES AVE	01 - ADDAMS	01	DF
ABITOGUN, 02	CATALINA	1913 STRAWBERRY LN	01 - ADDAMS	01	DF
ABITOGUN, 01	AALIYAH	56 CIRCLE DR	01 - ADDAMS	01	DF
ABEL, 0003	CLAIRE	56 Circle DR	01 - ADDAMS	02	DF
ABDUL-RAHIM II, 01	OMAR	82 Castings RD, 62707	01 - ADDAMS	01	DF
ABDELGHANI, 04	JOUD	1913 STRAWBERRY LN	01 - ADDAMS	01	DF
ABDELGHANI, 01	SANA	1913 STRAWBERRY LN	01 - ADDAMS	01	DF
ABDELFAH, 01	MARIAM	A123 S 2nd ST	01 - ADDAMS	01	DF
ABDELFAH, 001	AHMED		01 - ADDAMS	01	DF
ABBOTT, 02	JAMARI	600 E MADISON ST	01 - ADDAMS	01	DF
ABBEY, 05	KAMARE	1200 N DANIEL AVE	01 - ADDAMS	01	DF
ABBEY	KALISE	2000 BUNN DR, 62703	01 - ADDAMS	01	DF
ABBEY	KALISE	5 RIDGE CT	01 - ADDAMS	01	DF
AAA1	AAA1	403 Bitterroot DR, 62613	01 - ADDAMS	01	DF
6	EduLog	1123 S 7 ST, 62703	01 - ADDAMS	01	DF
5	EduLog	1123 S 7 ST, 62703	01 - ADDAMS	01	DF

**Selected Students**

Last N...	First Name	Address	District ID	Eligibility	Def...	Exc...	Ho...	Itin...	No...
ABRAMS, 01	CARRIE	310 E Jeffer...	1405312	Eligible	✓	x	x	x	x
ABRAHAM	EVA	401 CLIPPE...	1380315	Eligible	✓	x	x	x	x
ABODUNRIN	HANNAH	2629 W LA...	1381824	Eligible	✓	x	✓	x	x
ABITOGUN...	KOLADE	80 LOCKSL...	1372558	Eligible	✓	x	✓	x	x
ABITOGUN...	KAYODE	1737 W ILE...	1406717	Eligible	✓	x	✓	x	x
ABITOGUN...	CATALINA	1913 STRA...	1399881	Eligible	x	x	✓	x	x
ABITOGUN...	AALIYAH	56 CIRCLE ...	1403999	Eligible	x	✓	✓	x	x

**Configure Report**

Scheduled ☐ Portrait ☒ Landscape ☐ .pdf ☐ .csv

☐ Show 1st column ☐ Repeat header(s)

Address

Date Of Birth

District ID

EduLog ID

Eligibility

Email

Enrollment Date

Exclusive Stop

First Name

Gender

**Reports Available**

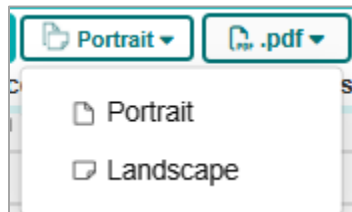
File Name	Status	Type	Creation TI...	Message
student_5b2dee1a-12c1-44...	Complete...	Manual	01/31/2025, 11:5...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/31/2025, 03...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/31/2025, 02...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/30/2025, 12...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/30/2025, 11:5...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/30/2025, 11:5...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/30/2025, 11:5...	
student_5b2dee1a-12c1-44...	Complete...	Manual	01/30/2025, 01...	

**Preview**

User-defined File Name

## 7. Configure Report

- First, select how you want your report in either Portrait or Landscape.



- Then select the report file format, either PDF or CSV.



- For the fields you would like to show on the report, select the “Add” button.



Available Fields:

Address	>	Notes	>
Date Of Birth	>	Phone Number	>
District ID	>	Photo	>
Edulog ID	>	Program	>
Eligibility	>	RFID	>
Email	>	School	>
Enrollment Date	>	School Code	>
Exclusive Stop	>	SIS Address	>
Gender	>	Special Needs	>
Government ID	>	SPED/IEP	>
Home Right Side	>	Suffix	>
Home Room Teacher	>	Withdraw Date	>
Home Stop	>	Contacts	+
Latitude	>	UDFs	+
Longitude	>	Mailing Address	>
Max Ride Time	>	Grade	>
Middle Name	>	Last Name	>
Needs Notes	>	First Name	>
Nickname	>	Created	>
No-Rider	>	Created By	>
		Last Modified	>
		Last Modified By	>

- The configuration fields will display on the right.

Scheduled

Portrait

.pdf

Choose a configuration

Show 1st column

Repeat header(s)

Home Room Teacher	>	<< Remove All	Field Order	Sort Order	Max length	Page	Header label
Home Stop	>	< Last Name	1	▼	12		Header label
Latitude	>	< First Name	2	▼	12		Header label
Longitude	>	< Grade	3	▼	12		Header label
Max Ride Time	>	< Mailing Address	4	▼	12		Header label
Middle Name	>	< Phone Number	5	▼	12		Header label
Needs Notes	>						
Nickname	>						
No-Rider	>						
Notes	>						
Photo	>						
Program	>						
RFID	>						
School	>						
School Code	>						
SIS Address	>						

- You can also remove a field by selecting the “Remove” button.

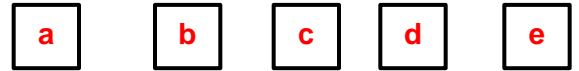


- The Covers filed has a plus icon indicating there are sub-fields to choose from. Click on the plus icon and select your fields. Cover fields also exist in other reports.



- **Fields and Tools within Configure Report Panel**

In this section of the Configure Report card, you can arrange your fields in field or sort order.



< Remove All		Field Order	Sort Order	Max length	Page	Header label
<	Last Name	1	2 ▼	12		Header label
<	First Name	2	▼	12		Header label
<	Address	3	▼	12		Header label
<	Phone Number	4	▼	12		Header label
<	Grade	5	1 ▼	12		Header label

**a) Field Order**

Concerns the order you want the data to display in the report. For example, first Name, Last Name, Address, Phone Number, and Grade. To change the Field Order, drag and drop the field in the order you want it.

**b) Sort Order**

The Sort Order allows the user to sort to order in which the data will display in both pdf and csv reports. Select the order in the drop-down menu.

**c) Max Length**

Max Length is how much space (length) the entire field will take up.

**d) Page**

By selecting Page, you are creating Page Breaks between data fields. For example, when sorting students by Grade, you will need to first check that Grade is listed first in the Sort Order. Then by selecting Page, this will create a page break between each grade.

**e) Header Label**

The header label changes the label that shows up in the header for that field.

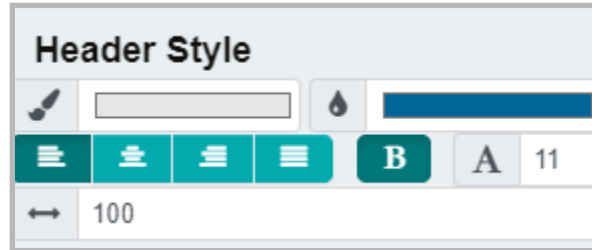
Student Report					
First Name	Last Name	Date Of Birth	Mailing Address	Phone Number	

- **Change Style**

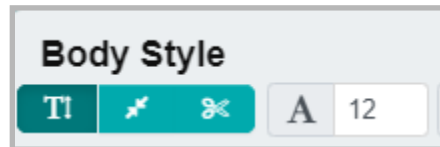
You can change the style of the report in several different ways: Condensed or Normal spacing, the Header Style and the Body Style.



- a) Select either Condensed or Normal spacing from the drop-down menu.
- b) When editing in the **Header Style**, you have several different options:
  - Heading Colors
  - Text Alignment
  - Text Font Style



- c) When editing the **Body Style**, you have several options:
  - Stretch Field Height to Fit
  - Cut Font to Fit
  - Change Font Size



## • Save Configuration

Once you have your report configured, you can save your configuration by entering a name in the “Choose a Configuration Box” and save.



Once saved, you can search for the configuration in the box, delete it, or reset it.



Note: PDFs and CSVs each have their own saved configurations.

## 8. Preview Report

Once the fields are added, you will see a Preview of the report populate below. As you add and remove fields from the Configure Report card, the Preview will update accordingly.

Student Report				
First Name	Last Name	Date Of Birth	Mailing Address	Phone Number
First	Last	12/3/11	999 ABC AVE	(555)888-9999

**Note:** The Preview is a sample report.

## • User-defined File Name

Before generating the report, you can give your report a user-defined file name. Enter the name in this box.

User-defined File Name

Addams Student Report

Then select either the year, month, day, and time or just the year, month, and day.

yyyyMMdd-HH:mm:ss X

yyyyMMdd-HH:mm:ss

yyyyMMdd

Then select Save, to save the name.

Note: You can also click the "X" to remove the date and time stamp entirely

## 9. Generate Report

To generate and download the report, select the “Generate Report” button.

Generate Report

There are three options in the Generate Report button.

☐
Export Report To S3

With Selected Data

With Filter(s) Condition

- Export to S3** – you can export your report to an S3 folder that is linked to your district’s SFTP folder, if that has been setup.
- With Selected Data** – you can generate the report with just the data you selected in the Data Panel.
- With Filter(s) Conditions** – you can generate the report with all filtered data, based on the filters you search by.

## 10. Reports Available

Once your report is generated, it will be saved in the Reports Available card, in the lower left of the data panel. This is the history of generated reports.

Reports Available

View Reports Queue

Columns

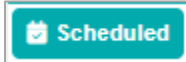
File Name	Status	Type	Creation T... ↓	Message
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...	<div> <div></div> <div></div> </div>
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...	<div> <div></div> <div></div> </div>
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...	<div> <div></div> <div></div> </div>
student_5b2dee1a-12c1-4...	Comple...	Manual	01/31/2025, 11:...	<div> <div></div> <div></div> </div>
student_5b2dee1a-12c1-4...	Comple...	Manual	01/31/2025, 03:...	<div> <div></div> <div></div> </div>

From here, you can download your report to your downloads folder by selecting the download icon.



## 11. Scheduling Reports

Standard Reports can also be scheduled. In the Configuration Report card, select the Scheduled button.



The Create Schedule window will open.

### Create Schedule

**Schedule**

☒ One Time

☐ Daily

☐ Day(s) of the Week

**Start Date \***

**Scheduled Time \***

**Filter Condition \***

**Configure Report \***

**User Defined Filename**  
  
File name will be "configuration\_name\_yyyyMMdd-HH:mm:ssSSS"

☐ **Export Report To S3**

- Select One Time, Daily, or Day(s) of the week.
- Select a Start Date and Scheduled Time.
- Select a Filter Condition – if you do not have a saved filter condition, you must save your filter search in the Search Tray. Then it will appear in the Filter Condition drop-down menu.
- Select a Configure Report – if you do not have a saved report configuration, you must save your configuration in the Configure Report card.
- User Defined Filename – give your report a name.
- Export Report to S3 – This option is if you have an S3 folder linked to your district's SFTP folder.
- Then select Save.

Create Schedule

Schedule

☒ One Time
 ☐ Daily
 ☐ Day(s) of the Week

Start Date \*

02/14/2025

×

📅

Scheduled Time \*

04:00 PM

×

🕒

Filter Condition \*

Addams

×

▼

Configure Report \*

Student List

×

▼

User Defined Filename

Addams Student List

yyyyMMdd-HH:mm:ssSSS

File name will be "Addams Student List\_yyyyMMdd-HH:mm:ssSSS"

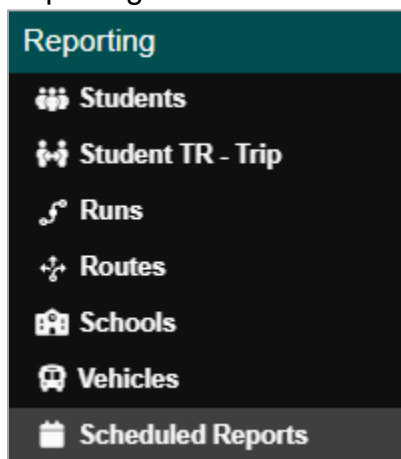
☐ Export Report To S3

Cancel

Save

## 12. Scheduled Reports

To view your scheduled reports, navigate to the Action Bar and select Scheduled Reports under Reporting.



The Scheduled Reports Module will open.

Routing » Reporting » Scheduled Reports

User SurveyActive Data Area: plan

Report List

PDFCSV

Report Type	Format Report Name	Schedule
Route	configuration_name_datetime	
Run	configuration_name_datetime	
School	configuration_name_datetime	
Student	configuration_name_datetime	
Student TR	configuration_name_datetime	

Scheduled Reports

View Reports QueueReload

Report Type	Report Name	Type	Scheduled Type	Status	Scheduled Time	Executed Time	Next Run Time	User Name	Edit	Cancel
Student TR Trip	Unassigned Student TR List	Scheduled	Day(s) of the Week	Pending	03/14/2025, 04:30 PM		03/14/2025, 04:30 PM			

Report Files

File Name	Report Type	Status	Type	Executed Time	Creation Time	User Name	Message	
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Unassigned Student TR List.csv	Student TR Trip	Completed	Scheduled	03/10/2025, 04:30 PM	03/10/2025, 04:30 PM	Andrea Brunson		
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Student TR Trip	Student TR Trip	Error	Scheduled			Andrea Brunson	Internal server error, please contact Edulog Support	
Unassigned Student TR List_20250224-16300101...	Student TR Trip	Completed	Scheduled	02/24/2025, 04:30 PM	02/24/2025, 04:30 PM	Andrea Brunson		
Unassigned Student TR List_20250221-16300101...	Student TR Trip	Completed	Scheduled	02/21/2025, 04:30 PM	02/21/2025, 04:30 PM	Andrea Brunson		
Unassigned Student TR List_20250217-16300101...	Student TR Trip	Completed	Scheduled	02/17/2025, 04:30 PM	02/17/2025, 04:30 PM	Andrea Brunson		

12 Records | 2 Pages

Records per page (10)

There are three report cards.

- **Report List** – These are the standard scheduled reports you can generate right from this module by selecting the schedule icon. First you must select PDF or CSV.



- **Scheduled Reports** – This is where you will see your scheduled reports. Select the View Reports Queue to see your scheduled report.



Reports Queue																																																																																																																																																																																																											
<div>Columns</div> <table> <tr> <th>Report Type</th><th>Report Name</th><th>Type</th><th>Scheduled Type</th><th>Status</th><th>Scheduled Time</th><th>Executed Time</th><th>Next Run Time</th><th>User Name</th><th>Email</th><th>Data Area</th><th>Cancel</th></tr> <tr> <td>Calendar</td><td>Calendar</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 03:50 ...</td><td></td><td>02/13/2025, 03:50 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Edulog Schools</td><td>EdulogSchools</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 03:50 ...</td><td></td><td>02/13/2025, 03:50 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>No Trips No Stops</td><td>NoTripsNoStops</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 03:50 ...</td><td></td><td>02/13/2025, 03:50 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>New Student Tally ...</td><td>NewstuTally</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 03:00 ...</td><td></td><td>02/13/2025, 03:00 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>New Student Tally ...</td><td>NewstuTallyDetail</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 02:50 ...</td><td></td><td>02/13/2025, 02:50 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Record Count Su...</td><td>RecordCountSum...</td><td>Scheduled</td><td>Day(s) of the Week</td><td>Pending</td><td>02/13/2025, 02:40 ...</td><td></td><td>02/13/2025, 02:40 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Record Count Stu...</td><td>RecordCountStud...</td><td>Scheduled</td><td>Day(s) of the Week</td><td>Pending</td><td>02/13/2025, 02:30 ...</td><td></td><td>02/13/2025, 02:30 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Day Not Routed</td><td>DaysNotRouted</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 02:20 ...</td><td></td><td>02/13/2025, 02:20 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Routing Activity</td><td>RoutingActivity</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 02:10 ...</td><td></td><td>02/13/2025, 02:10 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Day Not Routed St...</td><td>DaysNotRoutedSt...</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 02:00 ...</td><td></td><td>02/13/2025, 02:00 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Stop Travel Time</td><td>stop_travel_time</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 01:45 ...</td><td></td><td>02/13/2025, 01:45 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Student Travel Time</td><td>student_travel_time</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 01:30 ...</td><td></td><td>02/13/2025, 01:30 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Run Travel Time</td><td>run_travel_time</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/13/2025, 01:15 ...</td><td></td><td>02/13/2025, 01:15 ...</td><td></td><td></td><td>plan</td><td></td></tr> <tr> <td>Student TR Trip</td><td>test3</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/12/2025, 05:50 ...</td><td></td><td>02/12/2025, 05:50 ...</td><td>Bailey Eggebrecht</td><td>beggebrecht@edu...</td><td>plan</td><td></td></tr> <tr> <td>Run</td><td>RunStronStru TEST</td><td>Scheduled</td><td>Daily</td><td>Pending</td><td>02/12/2025, 02:22 ...</td><td></td><td>02/12/2025, 02:22 ...</td><td>David Goldthorn</td><td>dgoldthorn@edulo...</td><td>plan</td><td></td></tr> </table>												Report Type	Report Name	Type	Scheduled Type	Status	Scheduled Time	Executed Time	Next Run Time	User Name	Email	Data Area	Cancel	Calendar	Calendar	Scheduled	Daily	Pending	02/13/2025, 03:50 ...		02/13/2025, 03:50 ...			plan		Edulog Schools	EdulogSchools	Scheduled	Daily	Pending	02/13/2025, 03:50 ...		02/13/2025, 03:50 ...			plan		No Trips No Stops	NoTripsNoStops	Scheduled	Daily	Pending	02/13/2025, 03:50 ...		02/13/2025, 03:50 ...			plan		New Student Tally ...	NewstuTally	Scheduled	Daily	Pending	02/13/2025, 03:00 ...		02/13/2025, 03:00 ...			plan		New Student Tally ...	NewstuTallyDetail	Scheduled	Daily	Pending	02/13/2025, 02:50 ...		02/13/2025, 02:50 ...			plan		Record Count Su...	RecordCountSum...	Scheduled	Day(s) of the Week	Pending	02/13/2025, 02:40 ...		02/13/2025, 02:40 ...			plan		Record Count Stu...	RecordCountStud...	Scheduled	Day(s) of the Week	Pending	02/13/2025, 02:30 ...		02/13/2025, 02:30 ...			plan		Day Not Routed	DaysNotRouted	Scheduled	Daily	Pending	02/13/2025, 02:20 ...		02/13/2025, 02:20 ...			plan		Routing Activity	RoutingActivity	Scheduled	Daily	Pending	02/13/2025, 02:10 ...		02/13/2025, 02:10 ...			plan		Day Not Routed St...	DaysNotRoutedSt...	Scheduled	Daily	Pending	02/13/2025, 02:00 ...		02/13/2025, 02:00 ...			plan		Stop Travel Time	stop_travel_time	Scheduled	Daily	Pending	02/13/2025, 01:45 ...		02/13/2025, 01:45 ...			plan		Student Travel Time	student_travel_time	Scheduled	Daily	Pending	02/13/2025, 01:30 ...		02/13/2025, 01:30 ...			plan		Run Travel Time	run_travel_time	Scheduled	Daily	Pending	02/13/2025, 01:15 ...		02/13/2025, 01:15 ...			plan		Student TR Trip	test3	Scheduled	Daily	Pending	02/12/2025, 05:50 ...		02/12/2025, 05:50 ...	Bailey Eggebrecht	beggebrecht@edu...	plan		Run	RunStronStru TEST	Scheduled	Daily	Pending	02/12/2025, 02:22 ...		02/12/2025, 02:22 ...	David Goldthorn	dgoldthorn@edulo...	plan	
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- **Report Files** – Once your report has been generated, you can download them from the Report Files card by selecting the downloads icon.

Report Files						
File Name	Report Type	Status	Type	Executed Time	Creation Time	Message
Student List_20250129-150001...	Student	Completed	Scheduled	01/29/2025, 03:0...	01/29/2025, 03:0...	

# ATHENA STANDARD 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:

- Generate Schools Report
- Generate Run Report
- Schedule a CSV Student Trip Report

---

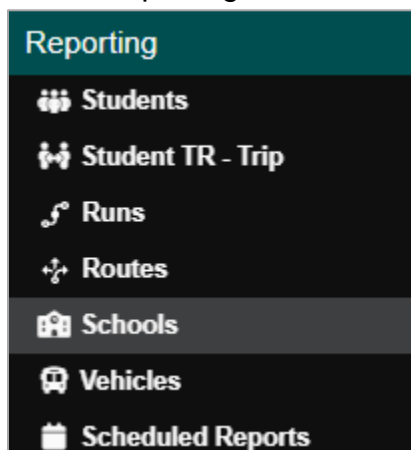
## Generate Schools Report

### Here's How

Once logged in to Routing Management, go to Reporting in the Action Bar.

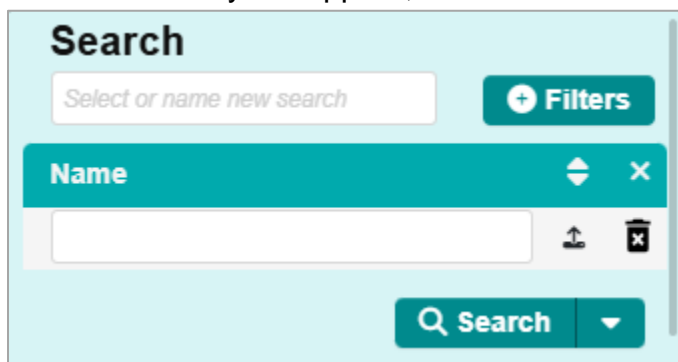
#### 1. Schools Report

Under Reporting, select Schools.



#### 2. Schools Search Tray

The Search Tray will appear, leave the Name field blank to search all schools.



#### 3. Save Search Field Condition

Enter Schools in the 'Select or name new search' field to save the search.

## Search

Filters

Name

☒ Save Changes

Search

## 4. Schools Configuration

Go to the Workspace Panel and select your configuration.

Configure Report

Scheduled

Portrait

.pdf

School Address List

☐ Show 1st column
☐ Repeat header(s)

Board ID

Board Name

Board School ID

Calendar ID

Country

Email

Level

Mailing Address

Phone Number

Remove All

	Field Order	Sort Order	Max length	Page	Header label
School Code	1		12		Header label
Name	2		12		Header label
Address	3		12		Header label
Grades	4		12		Header label
Programs	5		12		Header label

As you add and remove fields, the Preview will update accordingly.

School Report				
School Code	Name	Address	Grades	Programs
CRE	ABC SCHOOL	0010 DAHLIA DR	09	DFT

*Note: The Preview is a sample report.*

## 5. Generate Report

To generate and download the report, select the “Generate Report” button.

Generate Report

Then select With Filter(s) Condition.

☐ Export Report To S3

With Selected Data

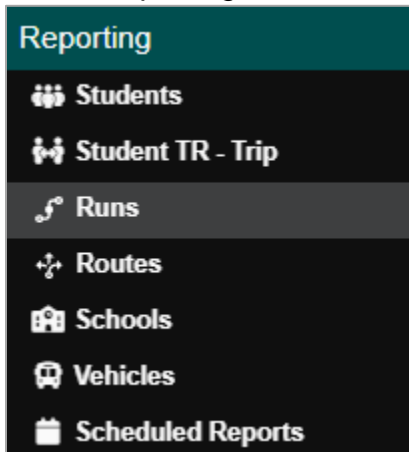
With Filter(s) Condition

---

## Generate Run Report

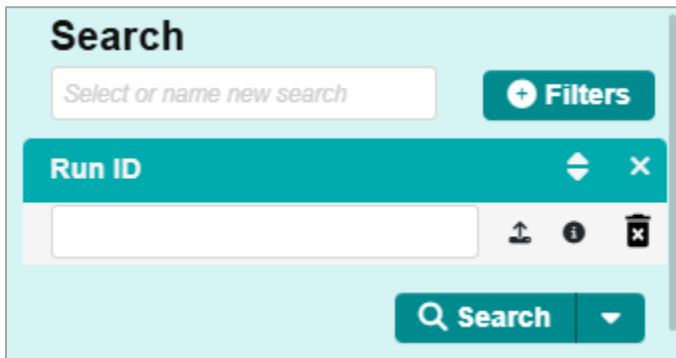
### 1. Runs Report

Under Reporting select Runs.



### 2. Runs Search Tray

The Search Tray will appear. Enter your Run ID, or if you leave the search tray blank, all runs will appear in the Data Panel.



### 3. Data Panel

The Runs will be listed in the Data Panel. When selecting runs, they will also appear in the Selected Runs card in the Workspace Panel.

Routing » Reporting » Runs

Active Data Area: plan

629 Results

Columns

Run ID

Description

Frequency

Load

Max Duration

Max Load

01.078-R

COPY - REVERSE - ADDAMS IN 1...

MTWUF

0

1s

60

01.078-R-R

REVERSE - ADDAMS IN 9:00

MTWUF

0

24h

60

01.082

ADDAMS IN 9:00

MTWUF

1

1s

60

01.082-R

REVERSE - ADDAMS IN 9:00

MTWUF

0

1s

60

01.140

ADDAMS OUT 3:30

MTWUF

10

1s

60

01.178

ADDAMS OUT 3:30

MTWUF

0

1s

60

01.178B

MTWUF

0

1h

40

01.E01

MTWUF

10

1h

40

01.T01

Test Frequency Run

MTWUF

0

0s

0

01.T11

Test Frequency Run

MTWU

0

0s

0

02.015

BLACK HAWK IN 9:00

MTWUF

6

1s

26

02.015-R

BLACK HAWK OUT 3:30

MTWUF

3

1s

26

02.901

MTWUF

0

1h

40

02.911

MTWUF

0

1h

40

02.P01

BLACK HAWK OUT @ 3:30

MTWUF

4

1h

40

02.S01

BLACK HAWK IN @ 9:00

MTWUF

4

1h

40

02.S01-C

COPY - BLACK HAWK IN @ 9:00

MTWUF

0

1h

40

03.014

HARVARD PARK IN 8:30

MTWUF

8

1s

60

03.014-R

REVERSE - HARVARD PARK IN 8:30

MTWUF

0

1s

60

03.017

HARVARD PARK IN 8:30

MTWUF

17

1s

60

Selected Runs

Description

Frequency

Load

Max Duration

Max Load

Run ID

School BellTime

Status

Stop Count

To or From Sc...

COPY - REVERSE - ADDAMS IN 11...

MTWUF

0

1s

60

01.078-R

01 - 11:30 AM

STA

8

From School

REVERSE - ADDAMS IN 9:00

MTWUF

0

24h

60

01.078-R-R

01 - 3:30 PM

STA

0

From School

ADDAMS IN 9:00

MTWUF

1

1s

60

01.082

01 - 9:05 AM

DYN

1

To School

REVERSE - ADDAMS IN 9:00

MTWU

0

1s

60

01.082-R

01 - 3:00 PM

STA

0

From School

ADDAMS OUT 3:30

MTWUF

10

1s

60

01.140

01 - 3:30 PM

STA

7

From School

ADDAMS OUT 3:30

MTWUF

0

1s

60

01.178

01 - 3:30 PM

STA

0

From School

MTWUF

0

1h

40

01.178B

01 - 3:30 PM

STA

0

From School

MTWUF

10

1h

40

01.E01

01 - 8:00 AM

STA

4

To School

Configure Report

Scheduled

Portrait

.pdf

Show 1st column

Repeat header(s)

Run report

Passenger List report

Activity Trip

Aide First

Aide Last

Aide Local ID

Bell Time

Comments

Reports Available

File Name

Status

Type

Creation Time

Message

No Data

Preview

User-defined File Name

Condensed

Header Style

Body Style

Default System File Name

yyyyMMdd-HH:mm:ss

Generate Report

**4. Runs Configuration**

In the Configuration section, you can select the fields you want to include in your report. Covers has a plus icon indicating there are sub-fields to choose from. Click on the plus icon and select your fields.

Configure Report

Scheduled

Portrait

.pdf

Show 1st column

Repeat header(s)

Run report

Passenger List report

Activity Trip

Aide First

Aide Last

Aide Local ID

Bell Time

Comments

Driver First Name

Driver ID

Driver Last Name

Remove All

Run ID

Run Description

Load

Covers

Field Order

Sort Order

Max length

Page

Header label

A preview of the report will be shown at the bottom of the Workspace Panel.

Run Report		
Run ID	Run Description	Load
Stop ID		
40.010	40.010 Description	1
120.059		

**6. Generate Report**

Click on the Generate Report button and make a selection.

Generate Report

---

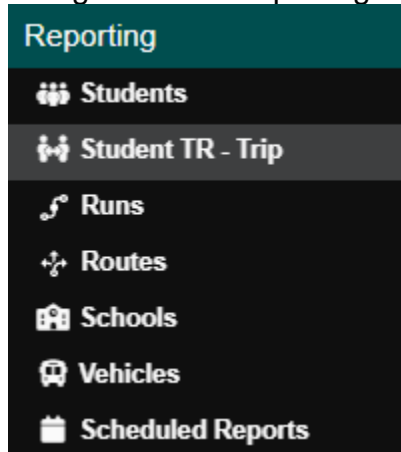
## Schedule a CSV Student Trip Report

You would like to create a report that identifies any unassigned students within the system, and would like that report to export automatically every Monday and Friday for the remainder of the school year.

### Here's How

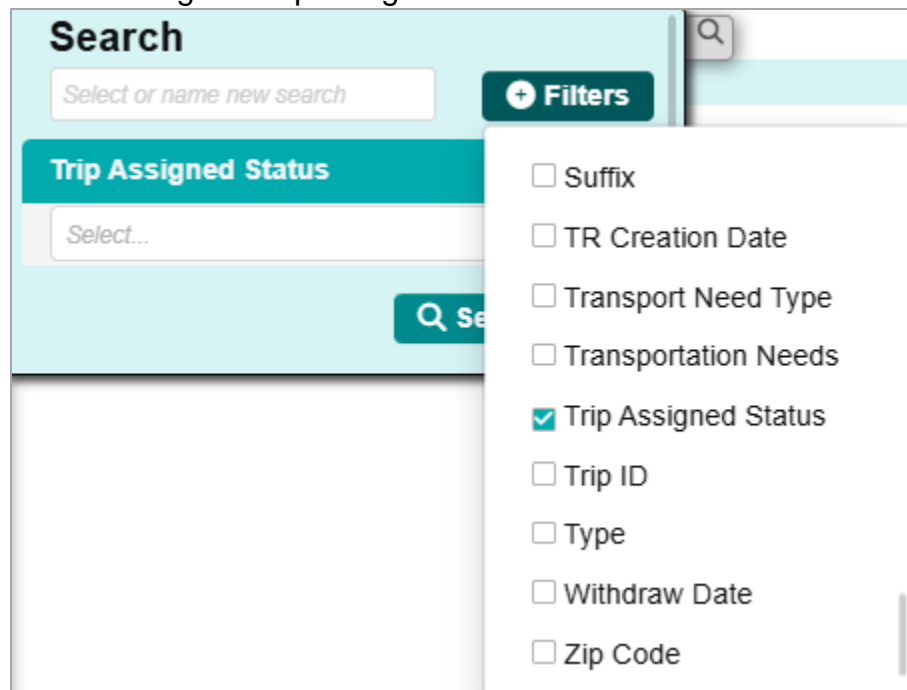
#### 1. Student TR – Trip Report

Navigate to the Reporting Student TR-Trips Module.

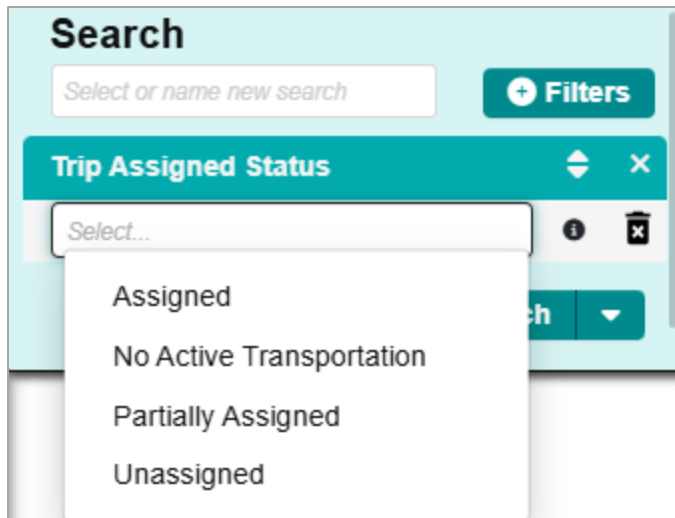


#### 2. Student TR Trip Search Tray

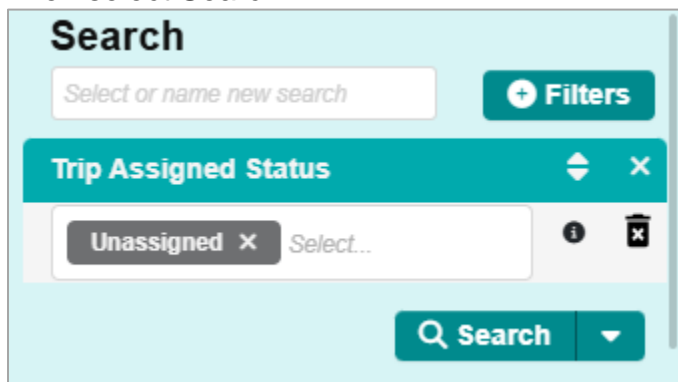
Search using the Trip Assignment Status filter.



In the search field, select Unassigned.

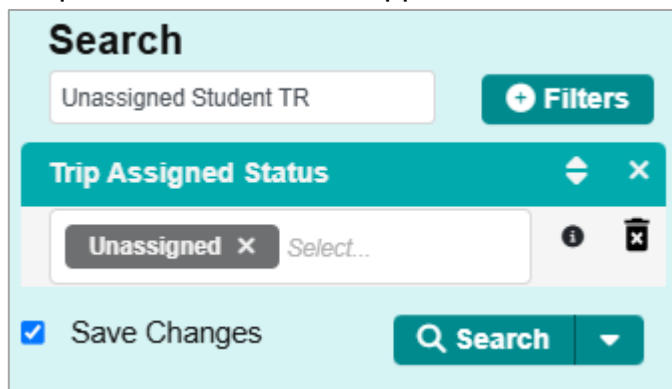


Then select Search.



- **Save Filter Template in the Search Tray**

Within the Search Tray, name the search parameters as a template by adding the name for the template within the blank upper field, and selecting search.



The search tray update with an additional Save Changes field following saving it as a template.

Note: Once the report is generated, delete the saved search to make sure it is not accidentally overwritten.

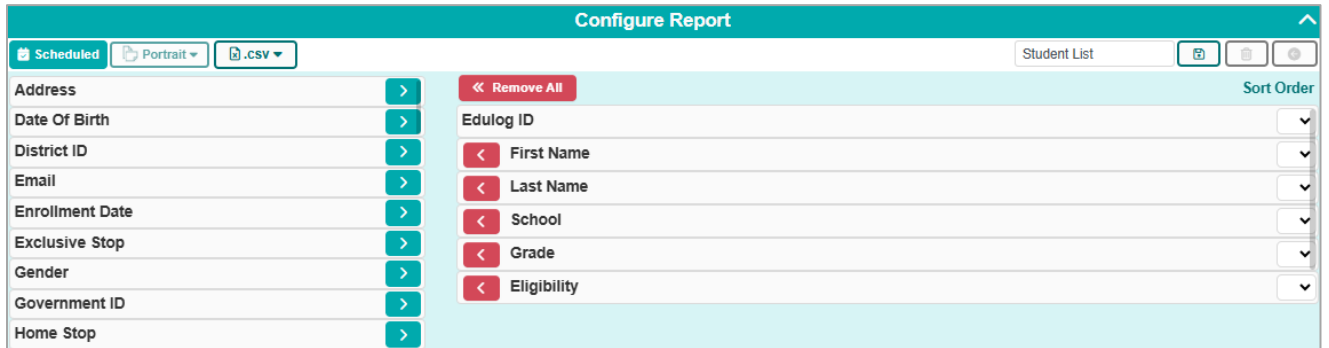
### 3. **Configure Report:**

Within the Configure Report card the user can create the report as follows:

- a.) Set to CSV.



## b.) Add Fields.



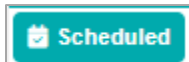
## c.) Save Template

Save the report as a template by adding an identifiable name to the field in the upper right corner of the card, and selecting “Save”.



## 4. Schedule Repot

After saving the report as a template, the user can then select the Scheduled button.



The Create Schedule window will open.

Create Schedule

Schedule

☐ One Time
☐ Daily
☒ Day(s) of the Week

Start Date \*

02/03/2025

×

Scheduled Time \*

04:30 PM

×

End Date

06/27/2025

×

Day(s) of the Week \*

Monday Friday

×

Filter Condition \*

Unassigned Student TR

×

Configure Report \*

Student List

×

User Defined Filename

Unassigned Student TR List

yyyyMMdd-HHmssSSS

File name will be "Unassigned Student TR List\_yyyyMMdd-HHmssSSS"

☐ Export Report To S3

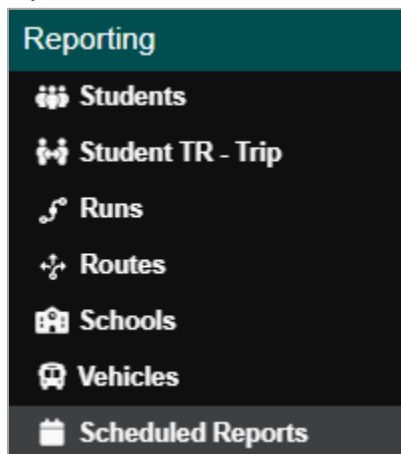
Cancel

Save

- Select the schedule time frame for Day(s) of the week.
- Then enter a Start Date, Scheduled Time, End Date and then add the Day(s) of the week.
- Select the Unassigned Filter Condition you created previously.
- Select the Configuration Report you saved previously.
- Give your report a Filename.
- Then select Save.

## 5. Verify the Scheduled Report

Open the Action Bar and select Scheduled Reports.



The report is now scheduled and can be verified in the Manually Run/Scheduled Reports card.

Routing » Reporting » Scheduled Reports

Active Data Area: plan

Report List

PDFCSV

Report Type	Format Report Name	Schedule
Route	configuration_name_yyyyMMdd-HH:mm:ssSSS	<div></div>
Run	configuration_name_yyyyMMdd-HH:mm:ssSSS	<div></div>
School	configuration_name_yyyyMMdd-HH:mm:ssSSS	<div></div>
Student	configuration_name_yyyyMMdd-HH:mm:ssSSS	<div></div>
Student TR	configuration_name_yyyyMMdd-HH:mm:ssSSS	<div></div>

Manually Run/Scheduled Reports

View Reports QueueReload

Report Type	Report Name	Type	Scheduled Type	Status	Scheduled Time	Executed Time	Next Run Time	Edit	Cancel
Student TR Trip	Unassigned Student TR List	Scheduled	Day(s) of the Week	Pending	02/14/2025, 04:30 PM		02/14/2025, 04:30 PM	<div></div>	<div></div>

Report Files

File Name	Report Type	Status	Type	Executed Time	Creation Time	Message
Student List_20250129-150001011.csv	Student	Completed	Scheduled	01/29/2025, 03:00 PM	01/29/2025, 03:00 PM	