



ATHENA STUDENT UTILITIES

Education Logistics, Inc.

Training
Guide

2025



Athena Student Utilities Training Guide

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PURPOSE OF THIS GUIDE

This Athena Student Utilities Training Guide is for district Administrators. It will provide you with explanations of the basic Student Utilities within Athena. Student Utilities assist in batch operations on student records.

ATHENA STUDENT UTILITIES INTRODUCTION

This guide will give you step by step instructions on how to use Student Utilities, like update student eligibility, find service for students, unassign students, and address match unmatched students.

NAVIGATING THE STUDENT UTILITIES MODULE

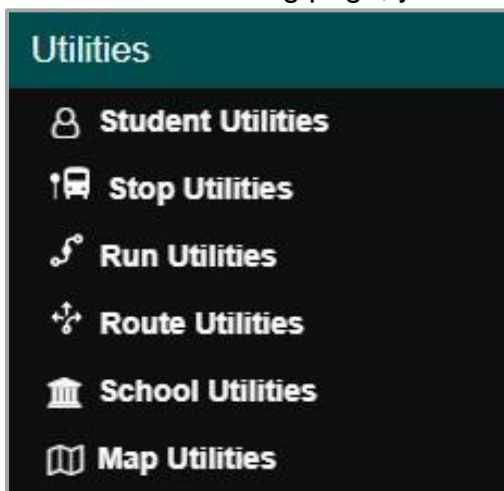
1. Tools

Once logged in, go to Tools on the Home Page.



2. Student Utilities

On the Tools landing page, you will see the main menu to the left. This is the Action Bar.



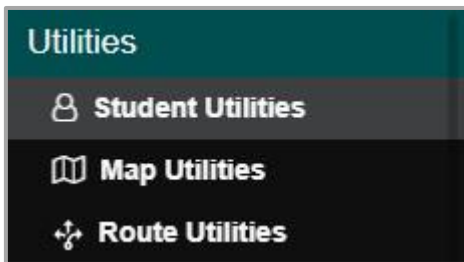
3. Action Bar

You can open and close the Action Bar by selecting the hamburger icon.



4. Student Utilities

In the Action Bar, select the Student Utilities Module.



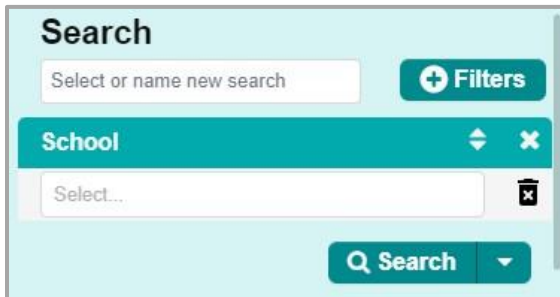
5. Select Students

At the top of the module, be sure to select Students or Inactive Students.



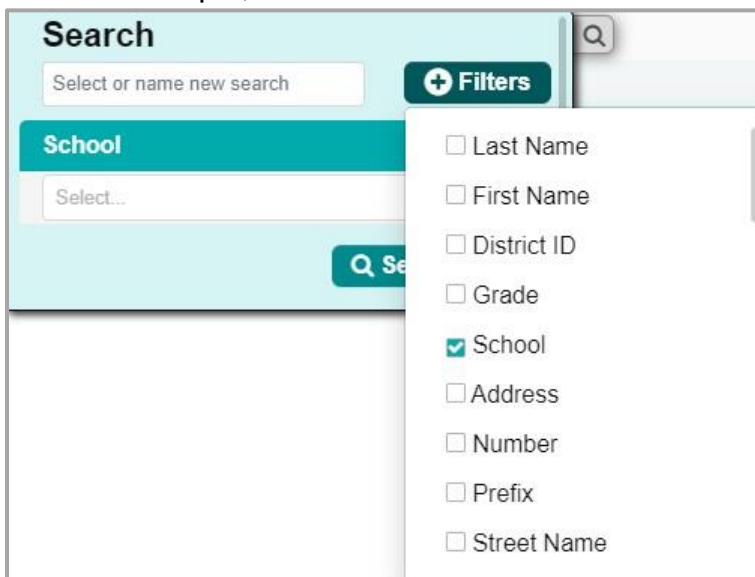
6. Search Tray

The search tray will appear and has various filters to choose from.



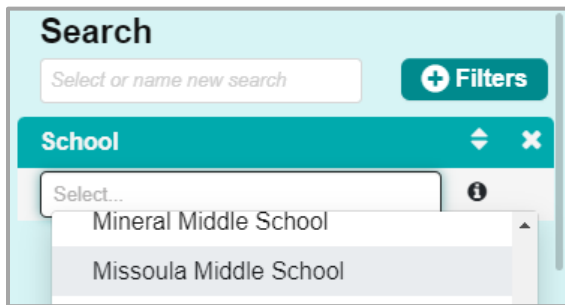
7. Filters

For this example, we will select the school filter.



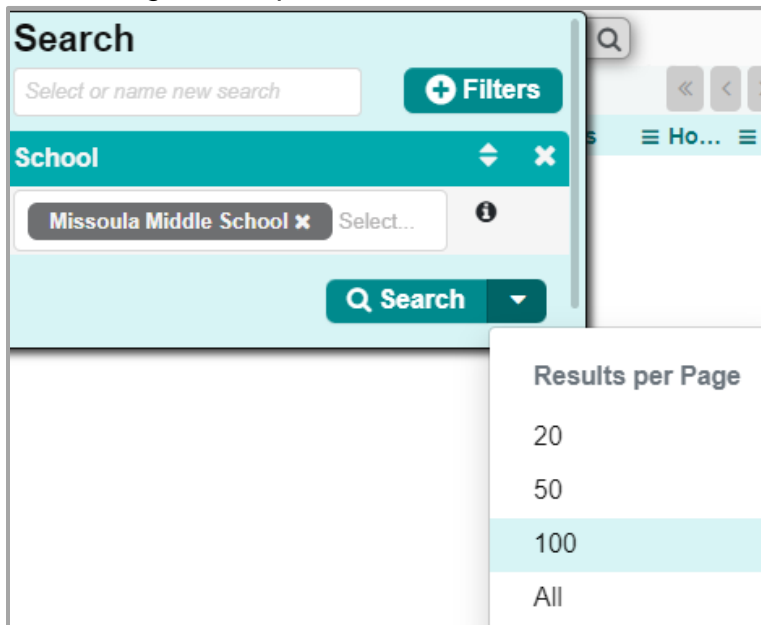
8. School in Dropdown

In the search box, select the school.



9. Results per Page

Then select 100 in the drop-down menu. Keep in mind that if you do a batch of over 100, it could take a long time to process.



10. Search

Then click on Search.



11. Data Panel

Students will appear in the Data Panel.

Tools » Utilities » Student Utilities
Active Data Area: plan

942 Results

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...	Address
0267	Abbott		Eligible	x	x	x	x	
0385	Abbott		Eligible	x	x	x	x	
0385_ALT1	Abbott		Eligible	x	x	x	x	
0679	Abbott		Eligible	x	x	x	x	
0012	Acosta		Out of area	x	x	x	x	
0675	Acosta		Eligible	x	x	x	x	
0245	Adams		Eligible	x	x	x	x	
0573	Adams		Eligible	x	x	x	x	
0179	Adams		Eligible	x	x	x	x	
0121	Adams		Eligible	x	✓	x	x	
0214	Aguirre	In walking...		x	x	x	x	
0219	Alexander		Eligible	x	x	x	x	
0979	Alfaro		Eloike	x	x	x	x	

Batch Operations Available

Created time	Type	Status	Result	Download
6/11/24, 10:38 AM	Unassign trips	Completed	Success	
6/11/24, 10:36 AM	Unassign trips	Completed	Success	
6/11/24, 10:35 AM	Unassign trips	Completed	Success	
6/11/24, 10:34 AM	Unassign trips	Completed	Success	
6/11/24, 10:31 AM	Unassign trips	Completed	Success	
6/7/24, 1:40 PM	Eligibility	Completed	Success	
6/5/24, 1:42 PM	Unassign trips	Failed	Failed	
6/5/24, 1:34 PM	Unassign trips	Completed	Partially failed	
6/5/24, 1:34 PM	Unassign trips	Completed	Partially failed	
6/5/24, 1:33 PM	Unassign trips	Completed	Partially failed	
6/5/24, 1:32 PM	Unassign trips	Completed	Partially failed	
6/5/24, 1:32 PM	Unassign trips	Completed	Failed	
6/5/24, 1:31 PM	Unassign trips	Completed	Failed	

Students **Inactive Students**

12. Select All Students

Select all student by choosing the box at the top of the Data Panel.

<input checked="" type="checkbox"/> Last Name								
<div> ☰ Tools » Utilities » Student Utilities </div>								
<div> <input type="text" value="Q"/> <div> <input type="button" value=" Columns"/> <input type="button" value="# Concurrent Record Sync"/> </div> </div>								
942 Results		<div> << < 1 2 3 4 5 6 7 8 > >> </div>					48 Pages	
<input checked="" type="checkbox"/>	District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No-...
<input checked="" type="checkbox"/>	0267	Abbott		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0385	Abbott		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0385_ALT1	Abbott		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0679	Abbott		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0012	Acosta		Out of area	x	x	x	x
<input checked="" type="checkbox"/>	0675	Acosta		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0245	Adams		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0573	Adams		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0179	Adams		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0121	Adams		Eligible	x	✓	x	x
<input checked="" type="checkbox"/>	0214	Aguirre		In walking...	x	x	x	x
<input checked="" type="checkbox"/>	0219	Alexander		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0979	Alfaro		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0126	Alfaro		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0010	Allen		Out of area	x	x	x	x
<input checked="" type="checkbox"/>	0169	Allen		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0250	Allison		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0359	Allison		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0717	Allison		Eligible	x	x	x	x
<input checked="" type="checkbox"/>	0765	Alvarez		Eligible	x	x	x	x

13. Workspace Panel

When selected, they will also be listed in the Workspace Panel.

Tools » Utilities » Student Utilities

Active Data Area: plan

942 Results

Columns

Concurrent Record Sync

Students

Inactive

District ID

Last Name

First Name

Eligibility

Itin...

Ho...

Exc...

No...

0267

Abbott

Eligible

x

x

x

x

0385

Abbott

Eligible

x

x

x

x

0385_ALT1

Abbott

Eligible

x

x

x

x

0679

Abbott

Eligible

x

x

x

x

0012

Acosta

Out of area

x

x

x

x

0675

Acosta

Eligible

x

x

x

x

0245

Adams

Eligible

x

x

x

x

0573

Adams

Eligible

x

x

x

x

0179

Adams

Eligible

x

x

x

x

0121

Adams

Eligible

x

✓

x

x

0214

Aguirre

In walking...

x

x

x

x

0219

Alexander

Eligible

x

x

x

x

0979

Alfaro

Eligible

x

x

x

x

0126

Alfaro

Eligible

x

x

x

x

0010

Allen

Out of area

x

x

x

x

0169

Allen

Eligible

x

x

x

x

0250

Allison

Eligible

x

x

x

x

0359

Allison

Eligible

x

x

x

x

0717

Allison

Eligible

x

x

x

x

0785

Alvarez

Eligible

x

x

x

x

Batch Operations Available

Columns

Created time

Type

Status

Result

Download

6/11/24, 10:38 ...

Unassign trips

Completed

Success

Download

6/11/24, 10:36 ...

Unassign trips

Completed

Success

Download

14. Selected Students

Selecting a student or students in the workspace panel, will activate the utilities batch buttons. You can access all buttons with the column's icon.

Selected Students

Stop Duration

Deactivate Students

Unassign Trips

Rematch Addresses

School Grade Program

Change Home Stop

Distance To School

Distance To Stops

Fill UDFs

Edit SPED/IEP

Rollover Grades

Eligibility

Addresses

Find Service

District ID

Address

Itin...

Ho...

Exc...

No...

1390122

4 BELHAV...

x

✓

✓

x

1390122_...

5 RIDGE CT

x

x

x

x

1403999

56 CIRCLE...

x

✓

✓

x

1399881

1913 STR...

x

✓

x

x

1381824

2629 W LA...

x

✓

x

x

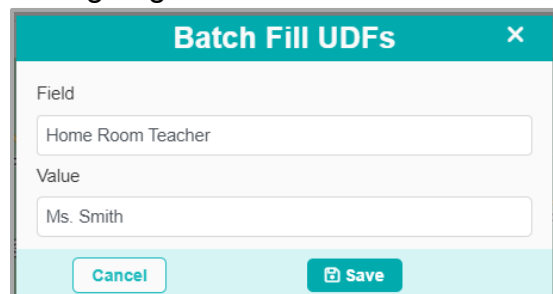
15. Fill UDFs

The Fill UDFs tool allows the user to batch fill in a selected UDF field for multiple selected students.

7

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For example, the user could fill in the “Home Room Teacher” field for all students at once, versus having to go into each student’s Athena file individually.

A dialog box titled "Batch Fill UDFs" with a close button (X) in the top right corner. It contains two input fields: "Field" with the text "Home Room Teacher" and "Value" with the text "Ms. Smith". At the bottom, there are two buttons: "Cancel" and "Save".

Field

Home Room Teacher

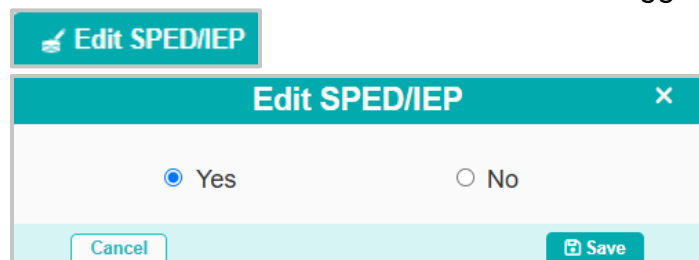
Value

Ms. Smith

Cancel Save

16. Edit SPED/IEP

The Edit SPED/IEP tool allows the user to toggle and bulk update student’s SPED/IEP status.

A dialog box titled "Edit SPED/IEP" with a close button (X) in the top right corner. It contains two radio buttons: "Yes" (selected) and "No". At the bottom, there are two buttons: "Cancel" and "Save".

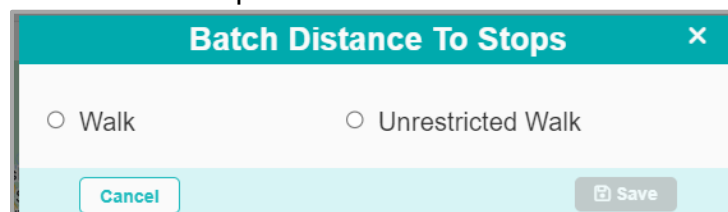
Edit SPED/IEP

Yes No

Cancel Save

17. Distance to Stops

The Distance to Stops tool allows the user to recalculate the walk or unrestricted walk distance to the students stop for all selected students.

A dialog box titled "Batch Distance To Stops" with a close button (X) in the top right corner. It contains two radio buttons: "Walk" (selected) and "Unrestricted Walk". At the bottom, there are two buttons: "Cancel" and "Save".

Batch Distance To Stops














Walk Unrestricted Walk

Cancel Save

Additionally, you have the option to export these changes to view in different distance measurements. In the “Batch Operations Available” card, you can click the *download* button, which will bring up a child window allowing you to select measurement type.

Batch Operations Available

Columns

Created time	Type	Status	Result	Download
9/27/24, 9:58 ...	Distance to st...	Completed	Success	
9/27/24, 9:56 ...	Distance to st...	Completed	Success	
9/27/24, 9:47 ...	Distance to st...	Completed	Partially failed	
9/27/24, 9:46 ...	Distance to st...	Started	Pending...	
9/26/24, 12:5...	Distance to st...	Completed	Success	
9/26/24, 10:4...	Distance to st...	Completed	Partially failed	
9/24/24, 1:29 ...	Distance to st...	Completed	Failed	
9/24/24, 1:29 ...	Distance to st...	Completed	Failed	
9/20/24, 10:1...	Distance to st...	Failed	Failed	
9/20/24, 8:21 ...	Find Service	Routing error	Failed	
9/20/24, 7:59 ...	Find Service	Completed	Warning	
9/19/24, 1:05 ...	Find Service	Completed	Partially failed	
9/3/24 6:09 PM	Fill UDFs	Completed	Success	

Batch Batch Distance To Stops

Choose the distance unit to proceed with the CSV export

☒ Feet
☐ Mile
☐ Meter
☐ Kilometer

Cancel

Save

18. Change Home Stop

The Change Home Stop tool allows the user to add or remove a home stop from multiple selected student records at once.

Batch Change Home Stop

☐ Add home stop
☐ Remove home stop

Cancel

Save

19. School Grade Program

The School Grade and Program tool allows the user to change the SGP for multiple selected students and/or perform Find Service for all Unassigned or Assigned trips amongst the selected students.

Batch Change School Grade Program

School

111 - Airport School

Grade

01

Program

DFLT

Do you want to perform Find Service for:

☐ Assigned Trips
 ☒ Unassigned Trips
 ☐ All Trips

Cancel

Clear Option

Save

Batch Change School Grade Program

You are about to change the school operation of 4 students to Airport School - 01 - DFLT students.batchChangeSGPMessage.UNASSIGNED_TRIPS. Do you want to proceed?

Cancel

✓ Proceed

20. Rematch Addresses

The Rematch Addresses tool allows the user to batch rematch the address for matched and/or unmatched students—this tool allows the user to target students who were not matched to their home address within the Student Import process.

- This tool additionally allows the user to ask the system to retain the previously assigned stop for previously matched students, or ask the system to find a new stop service for the selected students.

Batch Rematch Addresses

×

Parameters

Address

☐ Matched
☐ Unmatched
☐ All

Type

☐ Keep stop
☐ Find service

Stop Assignment

☐ Keep stop
☐ Find service

Cancel

Save

21. Unassign Trips

This tool allows the user to batch unassign Default and/or Custom trips for all students selected within the Workspace Panel of Student Utilities. Based on the TR type, the user will then identify if the system will unassign the To School and/or From School Trip.

Unassign

×

Which student trips should be updated?

TR Types

☒ Default
☐ Custom
☐ All

Directions

☐ To school
☐ From school
☒ Both

Cancel

Save

22. Deactivate Students

This tool allows the user to batch deactivate student records within Athena.

Student deactivation

×

You are about to deactivate 1 students. Do you want to proceed?

Cancel

✓ Proceed

23. Stop Duration

This tool allows the user to batch adjust the stop duration (The time spent at a stop) for multiple selected students.

Change duration at stop

Duration

☐ Change current value to zero

☐ Change only if new value is greater than current value

☐ Change only if current value is 0

Cancel

Clear Option

Save

24. Rollover Grades

Upload

No file uploaded yet.

Cancel

Upload

25. Eligibility

This tool allows the user to batch adjust student eligibility in the system.

- Selecting **Unprocessed/Ineligible Students** will change their eligibility to “Eligible”
- Selecting **Currently Eligible Students** will change their eligibility to “Not Eligible”.

Eligibility

Which students should have their eligibility reprocessed?

☐ Unprocessed / ineligible students
 ☐ Currently eligible students

☐ All students

Cancel

Save

26. Addresses

Recompute Address

You are about to recompute address of 1 students. Do you want to proceed?

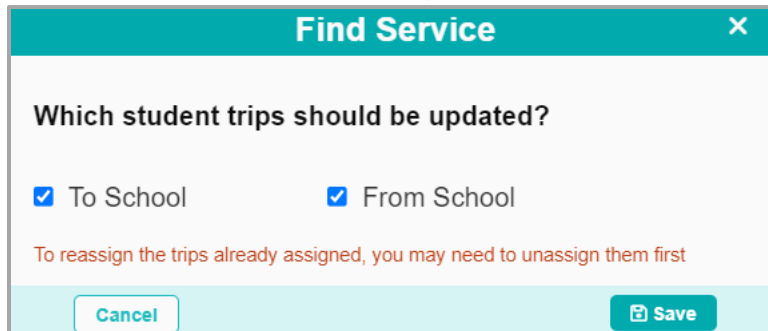
Cancel

✓ Proceed

27. Find Service

The Find Service tool allows the user to ask the system to find and assign unassigned student trips to an appropriate stop based on established walk distances.

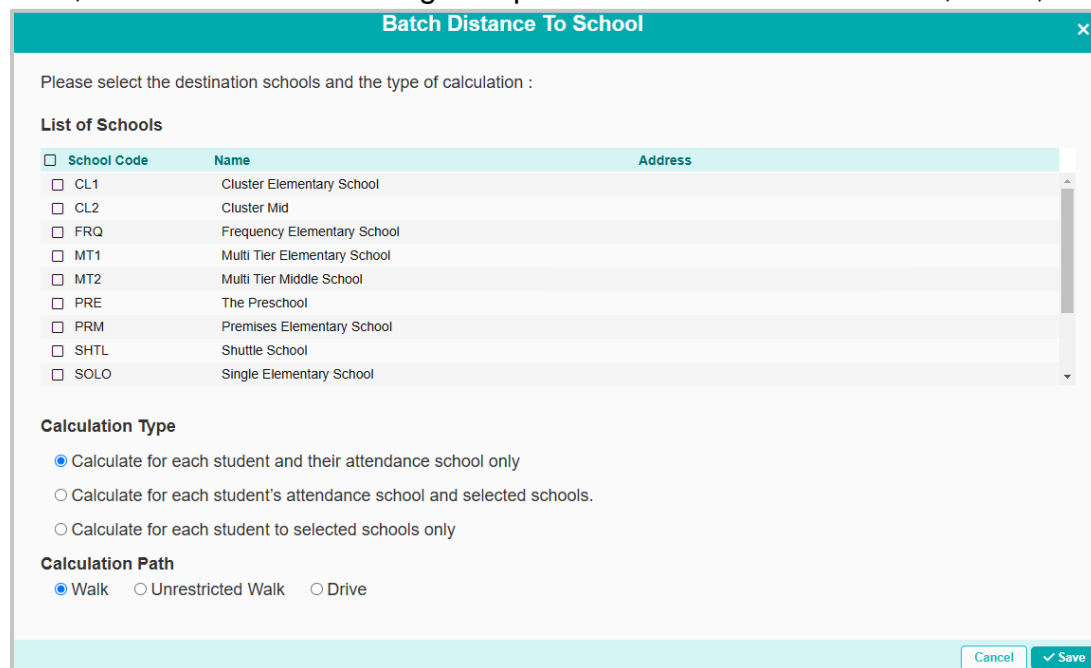
- This tool will not unassign previously assign trips to complete the find service request, this tool only works for already unassigned trips.



The 'Find Service' dialog box has a teal header with the title 'Find Service' and a close button. The main content area is white and contains the question 'Which student trips should be updated?'. Below this, there are two checkboxes: 'To School' and 'From School', both of which are checked. A red text note below the checkboxes states: 'To reassign the trips already assigned, you may need to unassign them first'. At the bottom, there are two buttons: 'Cancel' and 'Save'.

28. Distance to School

The Distance to School tool allows the user to calculate all selected student's walk, unrestricted walk, and drive distance using multiple units of measurement: feet, miles, meters, or kilometers.



The 'Batch Distance To School' dialog box has a teal header with the title 'Batch Distance To School' and a close button. The main content area is white and contains the instruction 'Please select the destination schools and the type of calculation :'. Below this, there is a section titled 'List of Schools' which contains a table with three columns: 'School Code', 'Name', and 'Address'. The table lists several schools with checkboxes next to their codes. Below the table, there is a section titled 'Calculation Type' with three radio button options. Below that, there is a section titled 'Calculation Path' with three radio button options. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

School Code	Name	Address
<input type="checkbox"/> CL1	Cluster Elementary School	
<input type="checkbox"/> CL2	Cluster Mid	
<input type="checkbox"/> FRQ	Frequency Elementary School	
<input type="checkbox"/> MT1	Multi Tier Elementary School	
<input type="checkbox"/> MT2	Multi Tier Middle School	
<input type="checkbox"/> PRE	The Preschool	
<input type="checkbox"/> PRM	Premises Elementary School	
<input type="checkbox"/> SHTL	Shuttle School	
<input type="checkbox"/> SOLO	Single Elementary School	

When navigating to the Batch Operations Available card to download the completed operation for “Batch Distance to School”, the following window will populate asking the user to select their preferred unit of measurement when calculating the walk/drive distance:

Batch Distance to School

×

Choose the distance unit to proceed with the CSV export

☒ Feet
☐ Mile
☐ Meter
☐ Kilometer

Cancel

Save

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:

- [Update Student Eligibility](#)
- [Find Service for Students](#)
- [Address Match Unmatched Students](#)
- [School, Grade, Program](#)
- [Rematch Address](#)
- [Deactivate Students](#)
- [Stop Duration](#)
- [Rollover Grades](#)

Update Student Eligibility

As a Transportation Administrator, I would like to update Eligibility codes based on boundaries that have been changed.

1. Tools

Once logged in, go to Tools on the Home Page.



2. Student Utilities

In the Action Bar, select the Student Utilities Module.



3. Select Students

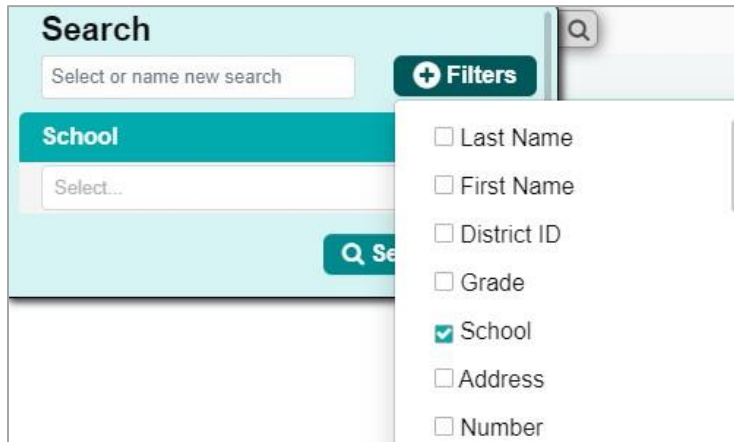
At the top of the module, be sure to select Students.



A horizontal selection bar with two radio buttons. The first radio button is selected and is labeled "Students". The second radio button is unselected and is labeled "Inactive Students".

4. School Filter

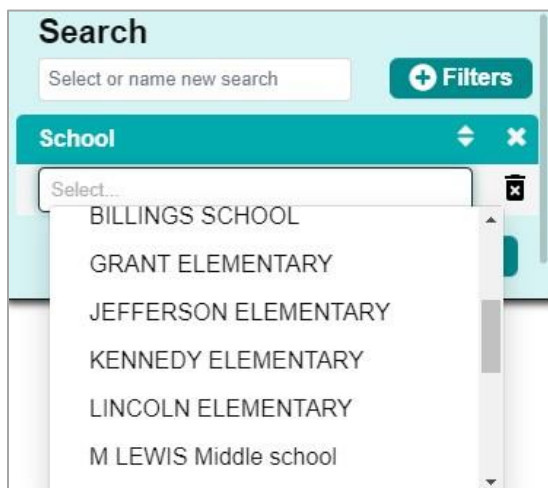
Select the school filter.



The screenshot shows a "Search" interface. At the top, there is a search input field with the placeholder text "Select or name new search" and a "+ Filters" button. Below the search bar, there is a "School" filter section with a "Select..." dropdown. To the right of the "School" filter, a dropdown menu is open, showing a list of filters: "Last Name", "First Name", "District ID", "Grade", "School" (which is checked), "Address", and "Number".

5. Select School

In the search box, select the school.



The screenshot shows the "Search" interface with the "School" filter dropdown open. The dropdown menu lists several schools: "BILLINGS SCHOOL", "GRANT ELEMENTARY", "JEFFERSON ELEMENTARY", "KENNEDY ELEMENTARY", "LINCOLN ELEMENTARY", and "M LEWIS Middle school".

6. Results per Page

Then select 100 in the search drop-down menu. Keep in mind that if you do a batch of over 100, it could take a long time to process.

Search

Select or name new search

Filters

School

KENNEDY ELEMENTARY x Select...

Search

Results per Page

20

50

100

All

7. Data Panel

Students will appear in the Data Panel.

Tools » Utilities » Student Utilities

Active Data Area: plan

942 Results

Columns Concurrent Record Sync

48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...	Address
0267	Abbott		Eligible	x	x	x	x	
0385	Abbott		Eligible	x	x	x	x	
0385_ALT1	Abbott		Eligible	x	x	x	x	
0679	Abbott		Eligible	x	x	x	x	
0012	Acosta		Out of area	x	x	x	x	
0675	Acosta		Eligible	x	x	x	x	
0245	Adams		Eligible	x	x	x	x	
0573	Adams		Eligible	x	x	x	x	
0179	Adams		Eligible	x	x	x	x	
0121	Adams		Eligible	x	✓	x	x	
0214	Aguirre		In walking...	x	x	x	x	
0219	Alexander		Eligible	x	x	x	x	
0979	Alfaro		Eligible	x	x	x	x	

Batch Operations Available

Created time	Type	Status	Result	Download
6/11/24, 10:38 AM	Unassign trips	Completed	Success	Download
6/11/24, 10:36 AM	Unassign trips	Completed	Success	Download
6/11/24, 10:35 AM	Unassign trips	Completed	Success	Download
6/11/24, 10:34 AM	Unassign trips	Completed	Success	Download
6/11/24, 10:31 AM	Unassign trips	Completed	Success	Download
6/7/24, 1:40 PM	Eligibility	Completed	Success	Download
6/5/24, 1:42 PM	Unassign trips	Failed	Failed	Download
6/5/24, 1:34 PM	Unassign trips	Completed	Partially failed	Download
6/5/24, 1:34 PM	Unassign trips	Completed	Partially failed	Download
6/5/24, 1:33 PM	Unassign trips	Completed	Partially failed	Download
6/5/24, 1:32 PM	Unassign trips	Completed	Partially failed	Download
6/5/24, 1:32 PM	Unassign trips	Completed	Failed	Download
6/5/24, 1:31 PM	Unassign trips	Completed	Failed	Download

Students

Inactive Students

8. Select All Students

Select all student by choosing the box at the top of the Data Panel.

☒ Last Name

Tools » Utilities » Student Utilities Active Data Area: plan

942 Results 1 2 3 4 5 6 7 8 48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	✓	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Batch Operations Available

Created time	Type	Status	Result	Download
6/11/24, 10:38 ...	Unassign trips	Completed	Success	
6/11/24, 10:36 ...	Unassign trips	Completed	Success	

Students Inactive

Selected Students

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No...
<input type="checkbox"/>	Abbott	0267		x	x	x	x
<input type="checkbox"/>	Abbott	0385		x	x	x	x
<input type="checkbox"/>	Abbott	0385_ALT1		x	x	x	x
<input type="checkbox"/>	Abbott	0679		x	x	x	x
<input type="checkbox"/>	Acosta	0012		x	x	x	x
<input type="checkbox"/>	Acosta	0675		x	x	x	x
<input type="checkbox"/>	Adams	0245		x	x	x	x
<input type="checkbox"/>	Adams	0573		x	x	x	x
<input type="checkbox"/>	Adams	0179		x	x	x	x
<input type="checkbox"/>	Adams	0121		x	✓	x	x
<input type="checkbox"/>	Aguirre	0214		x	x	x	x
<input type="checkbox"/>	Alexander	0219		x	x	x	x
<input type="checkbox"/>	Alfaro	0979		x	x	x	x
<input type="checkbox"/>	Alfaro	0126		x	x	x	x
<input type="checkbox"/>	Allen	0010		x	x	x	x
<input type="checkbox"/>	Allen	0169		x	x	x	x
<input type="checkbox"/>	Allison	0250		x	x	x	x
<input type="checkbox"/>	Allison	0359		x	x	x	x
<input type="checkbox"/>	Allison	0717		x	x	x	x
<input type="checkbox"/>	Alvarez	0765		x	x	x	x

9. Workspace Panel

Then select all students in the workspace panel.

Tools » Utilities » Student Utilities Active Data Area: plan

942 Results 1 2 3 4 5 6 7 8 48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	✓	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Batch Operations Available

Created time	Type	Status	Result	Download
6/11/24, 10:38 ...	Unassign trips	Completed	Success	
6/11/24, 10:36 ...	Unassign trips	Completed	Success	

Students Inactive Students

Selected Students

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No...
<input checked="" type="checkbox"/>	Abbott	0267		x	x	x	x
<input checked="" type="checkbox"/>	Abbott	0385		x	x	x	x
<input checked="" type="checkbox"/>	Abbott	0385_ALT1		x	x	x	x
<input checked="" type="checkbox"/>	Abbott	0679		x	x	x	x
<input checked="" type="checkbox"/>	Acosta	0012		x	x	x	x
<input checked="" type="checkbox"/>	Acosta	0675		x	x	x	x
<input checked="" type="checkbox"/>	Adams	0245		x	x	x	x
<input checked="" type="checkbox"/>	Adams	0573		x	x	x	x
<input checked="" type="checkbox"/>	Adams	0179		x	x	x	x
<input checked="" type="checkbox"/>	Adams	0121		x	✓	x	x
<input checked="" type="checkbox"/>	Aguirre	0214		x	x	x	x
<input checked="" type="checkbox"/>	Alexander	0219		x	x	x	x
<input checked="" type="checkbox"/>	Alfaro	0979		x	x	x	x
<input checked="" type="checkbox"/>	Alfaro	0126		x	x	x	x
<input checked="" type="checkbox"/>	Allen	0010		x	x	x	x
<input checked="" type="checkbox"/>	Allen	0169		x	x	x	x
<input checked="" type="checkbox"/>	Allison	0250		x	x	x	x
<input checked="" type="checkbox"/>	Allison	0359		x	x	x	x
<input checked="" type="checkbox"/>	Allison	0717		x	x	x	x
<input checked="" type="checkbox"/>	Alvarez	0765		x	x	x	x

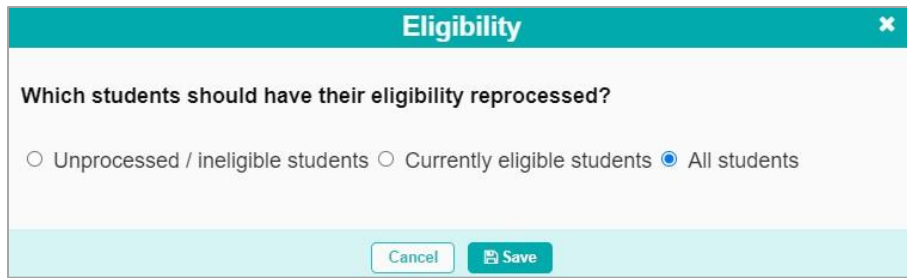
10. Eligibility

At the bottom of the Workspace, select the Eligibility button.



11. Eligible Students

12. Eligibility window will open. Select which student trips should be updated. Then select Save.



Eligibility [X]

Which students should have their eligibility reprocessed?

☐ Unprocessed / ineligible students
 ☐ Currently eligible students
 ☒ All students

- Be sure to do this process for each page of students until complete.

Find Service for Students

As a Transportation Administrator, I would like to find service for eligible students.

- **Tools**

Once logged in, go to Tools on the Home Page.



- **Student Utilities**

In the Action Bar, select the Student Utilities Module.



- **Select Students**

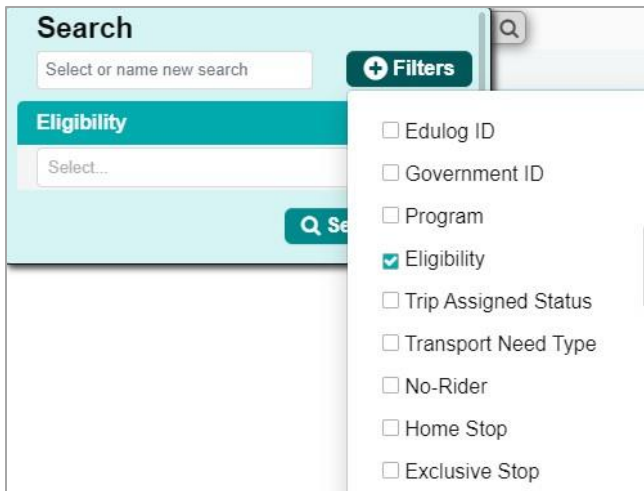
At the top of the module, be sure to select Students.



☒ Students
 ☐ Inactive Students

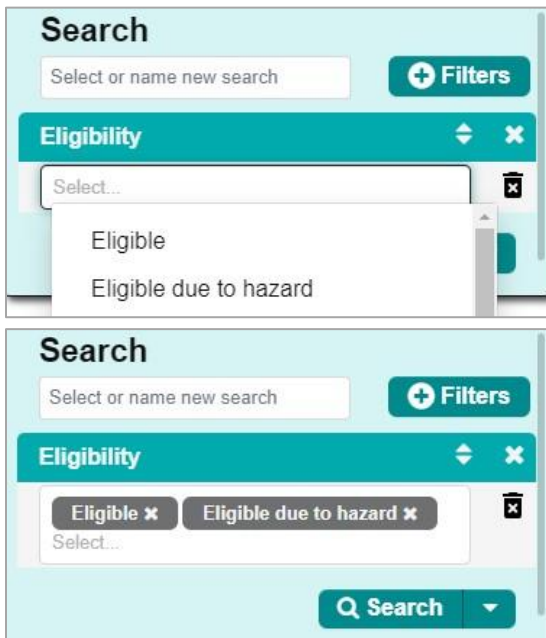
- **Eligibility Filter**

In the search tray, click on the Filters button and select Eligibility.



- **Select in Dropdown**

Select Eligible and Eligible due to hazard in the search field drop down.



- **Select No-Rider and Home Stop**

Then select No Rider and Home Stop.

Search

Select or name new search

+ Filters

Eligibility

Eligible ✕ Eligible due to hazard ✕

Select...

No-Rider

☐ Yes ☐ No

Home Stop

☐ Yes ☐ No

- ☐ Program
- ☒ Eligibility
- ☐ Trip Assigned Status
- ☐ Transport Need Type
- ☒ No-Rider
- ☒ Home Stop
- ☐ Exclusive Stop

Search

Select or name new search

+ Filters

Eligibility 2 ✕

Eligible ✕ Eligible due to hazard ✕

Select...

No-Rider 2 ✕

☐ Yes ☒ No

Home Stop 1 ✕

☐ Yes ☒ No

- **Results per Page**

Then select the Results per page by clicking on the down arrow next to the search button. It is recommended to only select 100 per page or less.

Search

+

Filters

Eligibility

Eligible x

Eligible due to hazard x

Select...

No-Rider

2

x

Yes

No

Home Stop

1

x

Yes

No

Search

Results per Page

20

50

100

All

- Data Panel**

Students will appear in the Data Panel. Select all students.

Tools

Utilities

Student Utilities

Active Data Area: plan

942 Results

Columns

Concurrent Record Sync

48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	x	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Batch Operations Available

Created time	Type	Status	Result	Download
6/11/24, 10:38 ...	Unassign trips	Completed	Success	Download
6/11/24, 10:36 ...	Unassign trips	Completed	Success	Download

Students

Inactive

Selected Students

Rollover Grades

Eligibility

Addresses

Field Service

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No...
Abbott		0267		x	x	x	x
Abbott		0385		x	x	x	x
Abbott		0385_ALT1		x	x	x	x
Abbott		0679		x	x	x	x
Acosta		0012		x	x	x	x
Acosta		0675		x	x	x	x
Adams		0245		x	x	x	x
Adams		0573		x	x	x	x
Adams		0179		x	x	x	x
Adams		0121		x	x	x	x
Aguirre		0214		x	x	x	x
Alexander		0219		x	x	x	x
Alfaro		0979		x	x	x	x
Alfaro		0126		x	x	x	x
Allen		0010		x	x	x	x
Allen		0169		x	x	x	x
Allison		0250		x	x	x	x
Allison		0359		x	x	x	x
Allison		0717		x	x	x	x
Alvarez		0765		x	x	x	x

- Workspace Panel**

Then select all students in the Workspace Panel.

Tools > Utilities > Student Utilities

Active Data Area: plan

942 Results

Columns

Concurrent Record Sync

Students

Inactive Students

District ID

Last Name

First Name

Eligibility

Itin...

Ho...

Exc...

No...

0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	x	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Charlotte

Selected Students

Rollover Grades

Eligibility

Addresses

Find Service

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No
Abbott		0267		x	x	x	x
Abbott		0385		x	x	x	x
Abbott		0385_ALT1		x	x	x	x
Abbott		0679		x	x	x	x
Acosta		0012		x	x	x	x
Acosta		0675		x	x	x	x
Adams		0245		x	x	x	x
Adams		0573		x	x	x	x
Adams		0179		x	x	x	x
Adams		0121		x	x	x	x
Aguirre		0214		x	x	x	x
Alexander		0219		x	x	x	x
Alfaro		0979		x	x	x	x
Alfaro		0126		x	x	x	x
Allen		0010		x	x	x	x
Allen		0169		x	x	x	x
Allison		0250		x	x	x	x
Allison		0359		x	x	x	x
Allison		0717		x	x	x	x
Alvarez		0765		x	x	x	x

Find Service

At the bottom of the Work Space, select Find Service

Update Trips

The Find Service window will open. Select which student trips should be updated. Then select Save.

Find Service

Which student trips should be updated?

☐ Currently unassigned trips only
 ☐ Replace current trips only
 ☒ All trips

Cancel

Save

- Repeat this process for each page of students.

Address Match Unmatched Students

As a Transportation Administrator, I would like to address match all unmatched students.

1. Tools

Once logged in, go to Tools on the Home Page.

22

Education Logistics, Inc. Confidential Information. Do not communicate, disclose, or make available all or any part of this document without permission.

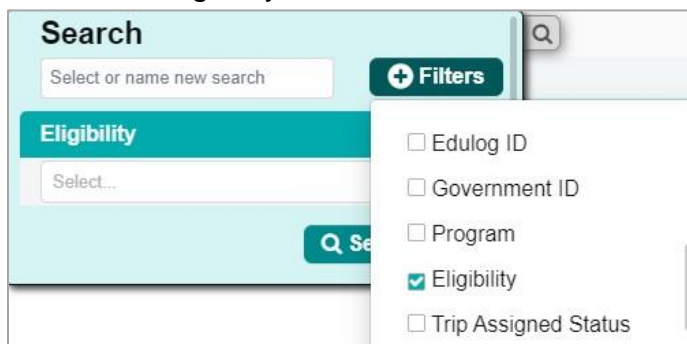
2. Student Utilities

In the Action Bar, select the Student Utilities Module.



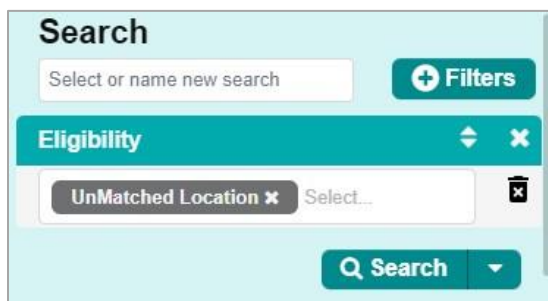
3. Eligibility Filter

Select the Eligibility filter.



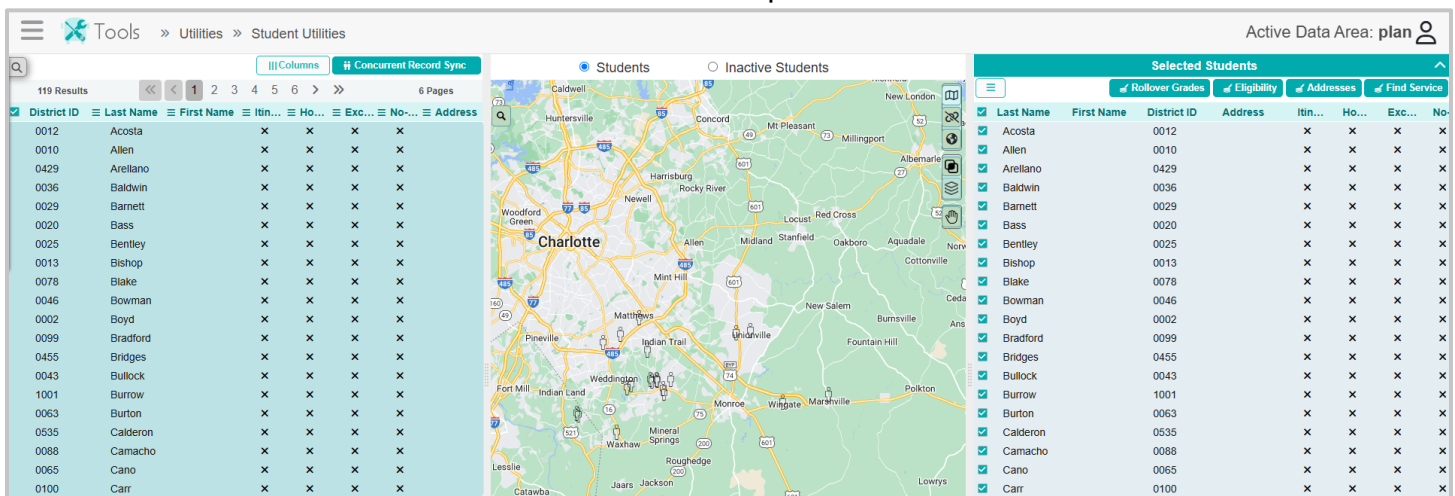
4. Unmatched Location

Then select Unmatched Location.



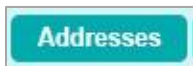
5. Workspace Panel

Select all students in the Data Panel and in the Workspace Panel.



6. Addresses

Then select the Addresses button below.



7. Recompute

The Recompute Address window will open. Select Yes to proceed.



8. Export Option

If any addresses still do not match, you can export the list and take care of them individually in the student file or SIS.



9. Download

The list will download to your computer downloads folder and you can open it from there.

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	District ID	Address	Home Sto	Exclusive	No-Rider	Eligibility	
2			685035		FALSE	FALSE	FALSE	UnMatched Location	
3			687485		FALSE	FALSE	FALSE	UnMatched Location	
4			169653		FALSE	FALSE	FALSE	UnMatched Location	
5			5169653		FALSE	FALSE	FALSE	UnMatched Location	

School, Grade, Program

As a Transportation Administrator, I would like to batch change the school, grade, and program for a group of students. In this example, a group of students are moving from one tech school to another tech school.

- **Tools**

Once logged in, go to Tools on the Home Page.



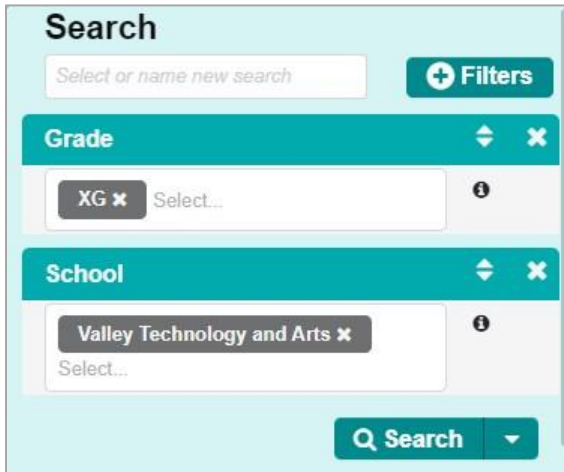
- **Student Utilities**

In the Action Bar, select the Student Utilities Module.



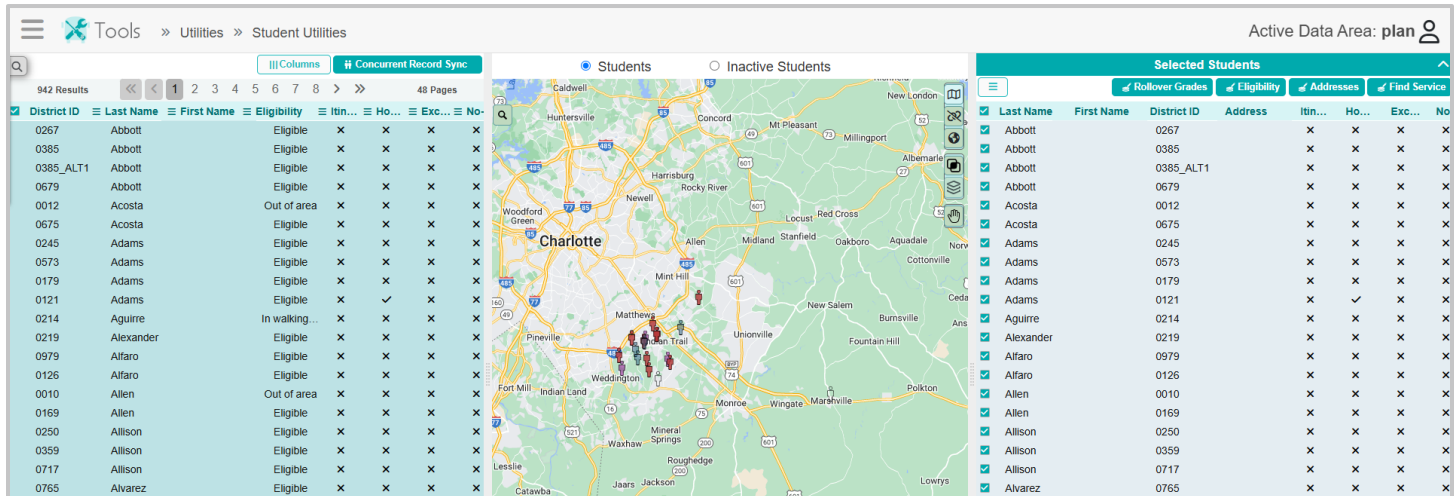
- **Search Tray**

In the search tray, search for the students you want to change.



- **Data Panel**

Select the students in the data panel, and then select them in the workspace panel.



- **SGP**

Then select the School, Grade, Program button.



- **Batch Change SGP**

The Batch Change School Grade Program window will open.

Batch Change School Grade Program

School

Grade

Program

Do you want to perform Find Service for:

☐ Assigned Trips
☐ Unassigned Trips
☐ All Trips

Cancel

Clear Option

Save

- **Select SGP**

Select the School, Grade and Program from the dropdown menu and make a selection under Do you want to perform Find Service for:

Batch Change School Grade Program

School

Teton Technology and Arts

Grade

XG

Program

DFLT

Do you want to perform Find Service for:

☒ Assigned Trips
☐ Unassigned Trips
☐ All Trips

Cancel

Clear Option

Save

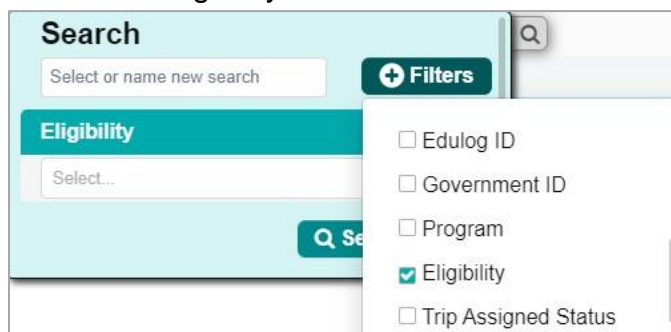
- Once you have made your selections, click on Save.

Rematch Address

As a Transportation Administrator, I would like to address match all unmatched students.

1. Eligibility Filter

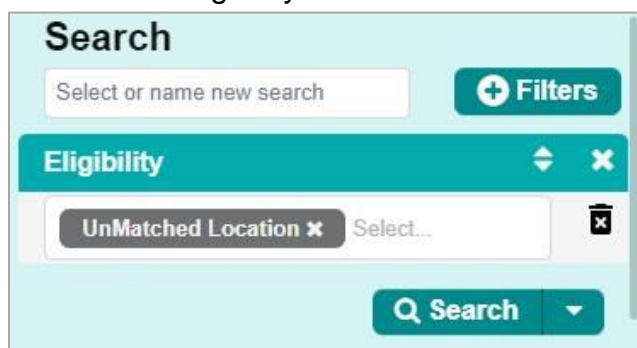
Select the Eligibility filter.



The screenshot shows the 'Search' interface with a dropdown menu for 'Eligibility' filters. The filters listed are: Edulog ID, Government ID, Program, Eligibility (checked), and Trip Assigned Status.

2. Search

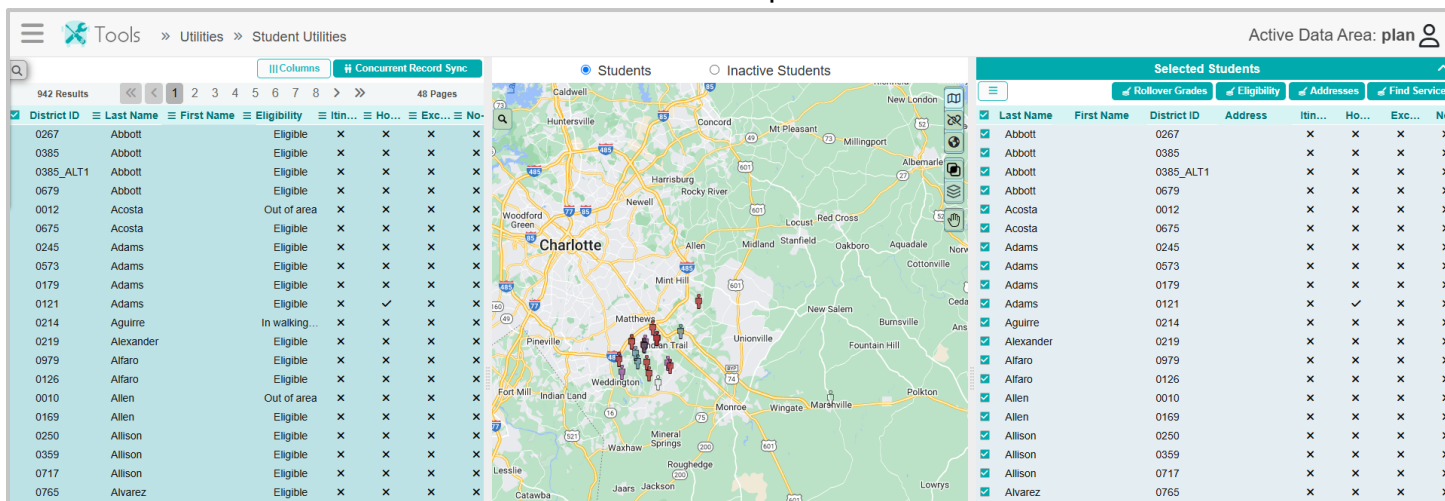
Choose the eligibility and then search.



The screenshot shows the 'Search' interface with the 'Eligibility' dropdown menu open. The 'UnMatched Location' filter is selected, and the 'Search' button is visible.

3. Select Students

Select all students in the Data Panel and in the Workspace Panel.

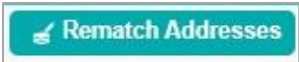


The screenshot shows the 'Student Utilities' interface. On the left is a table of 942 results. In the center is a map of Charlotte, NC, with red pins indicating student locations. On the right is a 'Selected Students' panel showing a list of students with checkboxes for selection.

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	✓	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

4. Rematch Addresses

Then select the Addresses button below.



5. Batch Rematch Addresses

The Batch Rematch Addresses window will open. Select your Parameters and then click on Save.

Batch Rematch Addresses

Parameters

Address Type

☐ Matched

☐ Unmatched

☒ All

Stop Assignment

☐ Keep stop

☒ Find service

Cancel

Save

Deactivate Students

As a Transportation Administrator, I would like to deactivate a group of students.

1. Search

In the search tray, select your filters and click on Search.

Search

Select or name new search

Filters

Grade

XG

Select...

School

Valley Technology and Arts

Select...

Search

2. Select Students

Select the students in the data panel, and then select them in the workspace panel.

Tools

Utilities

Student Utilities

Active Data Area: plan

942 Results

Columns

Concurrent Record Sync

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	x	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Students

Inactive Students

Selected Students

Rollover Grades

Eligibility

Addresses

Find Service

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No
Abbott		0267		x	x	x	x
Abbott		0385		x	x	x	x
Abbott		0385_ALT1		x	x	x	x
Abbott		0679		x	x	x	x
Acosta		0012		x	x	x	x
Acosta		0675		x	x	x	x
Adams		0245		x	x	x	x
Adams		0573		x	x	x	x
Adams		0179		x	x	x	x
Adams		0121		x	x	x	x
Aguirre		0214		x	x	x	x
Alexander		0219		x	x	x	x
Alfaro		0979		x	x	x	x
Alfaro		0126		x	x	x	x
Allen		0010		x	x	x	x
Allen		0169		x	x	x	x
Allison		0250		x	x	x	x
Allison		0359		x	x	x	x
Allison		0717		x	x	x	x
Alvarez		0765		x	x	x	x

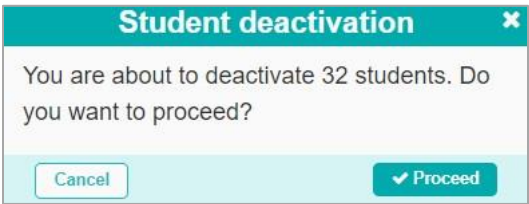
3. Deactivate Students

Then select the Deactivate Students button.



4. Student Deactivation

A Student deactivation confirmation window will appear, select Proceed.

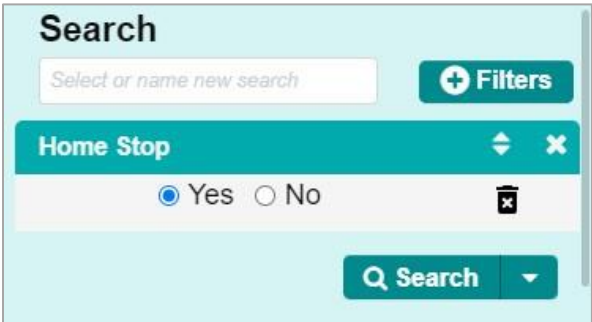


Stop Duration

As a Transportation Administrator, I would like to.

1. Search

In the search tray, select your filter parameters. The click on Search.



2. Select Students

Select the students in the data panel, and then select them in the workspace panel.

Tools » Utilities » Student Utilities Active Data Area: plan

942 Results << < 1 2 3 4 5 6 7 8 > >> 48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No...
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta	Out of area	x	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	✓	x	x
0214	Aguirre	In walking...	x	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen	Out of area	x	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Students Inactive Students

Selected Students

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No...
✓ Abbott		0267		x	x	x	x
✓ Abbott		0385		x	x	x	x
✓ Abbott		0385_ALT1		x	x	x	x
✓ Abbott		0679		x	x	x	x
✓ Acosta		0012		x	x	x	x
✓ Acosta		0675		x	x	x	x
✓ Adams		0245		x	x	x	x
✓ Adams		0573		x	x	x	x
✓ Adams		0179		x	x	x	x
✓ Adams		0121		x	✓	x	x
✓ Aguirre		0214		x	x	x	x
✓ Alexander		0219		x	x	x	x
✓ Alfaro		0979		x	x	x	x
✓ Alfaro		0126		x	x	x	x
✓ Allen		0010		x	x	x	x
✓ Allen		0169		x	x	x	x
✓ Allison		0250		x	x	x	x
✓ Allison		0359		x	x	x	x
✓ Allison		0717		x	x	x	x
✓ Alvarez		0765		x	x	x	x

3. Stop Duration

Then select the Stop Duration button.



4. Change Duration at Stop

The Change duration at stop window will open. Add the stop duration or select from the list of options, and click on Save.

✕

Change duration at stop

4m

☐ Change current value to zero

☐ Change only if new value is greater than current value

☐ Change only if current value is 0

Cancel

Clear Option

Save

Rollover Grades

As a Transportation Administrator, I would like to rollover grades from the previous year.

1. Search

Select the grade filter and then choose your grade.

Search

Select or name new search

Filters

Grade

08

Select...

Search

2. Select Students

Select the students in the data panel, and then select them in the workspace panel.

Tools

Utilities

Student Utilities

942 Results

Columns

Concurrent Record Sync

48 Pages

District ID	Last Name	First Name	Eligibility	Itin...	Ho...	Exc...	No
0267	Abbott		Eligible	x	x	x	x
0385	Abbott		Eligible	x	x	x	x
0385_ALT1	Abbott		Eligible	x	x	x	x
0679	Abbott		Eligible	x	x	x	x
0012	Acosta		Out of area	x	x	x	x
0675	Acosta		Eligible	x	x	x	x
0245	Adams		Eligible	x	x	x	x
0573	Adams		Eligible	x	x	x	x
0179	Adams		Eligible	x	x	x	x
0121	Adams		Eligible	x	✓	x	x
0214	Aguirre		In walking...	x	x	x	x
0219	Alexander		Eligible	x	x	x	x
0979	Alfaro		Eligible	x	x	x	x
0126	Alfaro		Eligible	x	x	x	x
0010	Allen		Out of area	x	x	x	x
0169	Allen		Eligible	x	x	x	x
0250	Allison		Eligible	x	x	x	x
0359	Allison		Eligible	x	x	x	x
0717	Allison		Eligible	x	x	x	x
0765	Alvarez		Eligible	x	x	x	x

Students

Inactive Students

Selected Students

Rollover Grades

Eligibility

Addresses

Find Service

Last Name	First Name	District ID	Address	Itin...	Ho...	Exc...	No
Abbott		0267		x	x	x	x
Abbott		0385		x	x	x	x
Abbott		0385_ALT1		x	x	x	x
Abbott		0679		x	x	x	x
Acosta		0012		x	x	x	x
Acosta		0675		x	x	x	x
Adams		0245		x	x	x	x
Adams		0573		x	x	x	x
Adams		0179		x	x	x	x
Adams		0121		x	✓	x	x
Aguirre		0214		x	x	x	x
Alexander		0219		x	x	x	x
Alfaro		0979		x	x	x	x
Alfaro		0126		x	x	x	x
Allen		0010		x	x	x	x
Allen		0169		x	x	x	x
Allison		0250		x	x	x	x
Allison		0359		x	x	x	x
Allison		0717		x	x	x	x
Alvarez		0765		x	x	x	x

3. Rollover Students

Then select the Rollover Grades button.



4. Grade Rollover Selection

Users can now select options for grade rollover on selected students. This includes ending All Custom transportation requests (TR's); end Matching custom TR's; Updating Custom TR's or none. Additionally, users can select to find service or not when performing the rollover.

Student Grade Rollover Batch Options ×

Grade Rollover Options

☐ End all Custom Transportation Requests

☐ End matching Custom Transportation Requests on school advancement

☐ Update Custom Transportation Requests on school advancement

☒ None

Find Service

☐ Yes

☒ No

Cancel

Save

5. Upload

The upload window will open.

Upload ×

No file uploaded yet.

Cancel

Upload

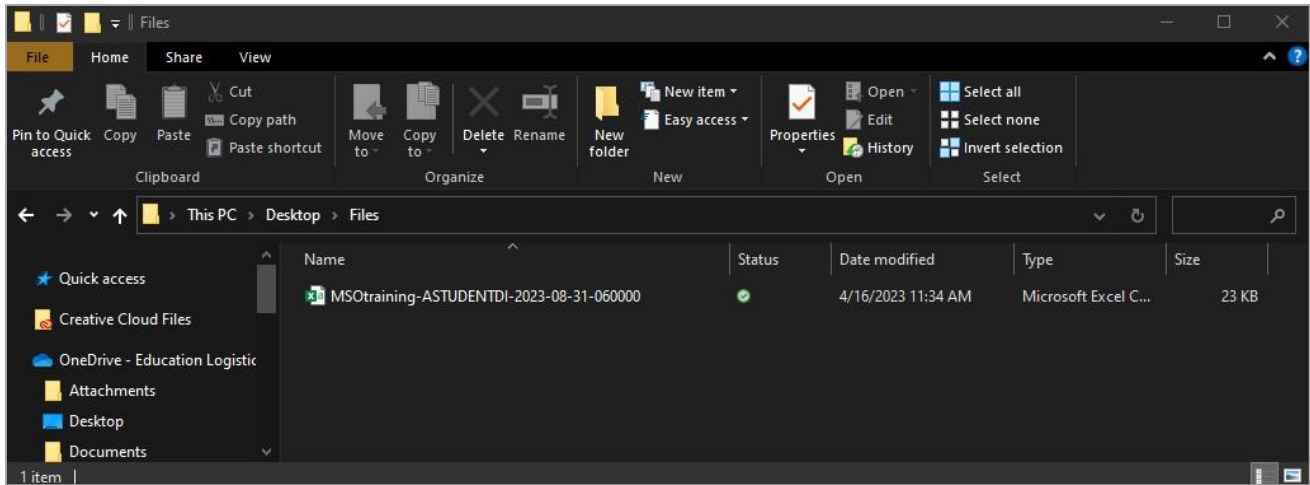
6. To Upload

Select the paperclip icon.



7. Select File

Then select the file on your computer.



8. Select Upload

Then select Upload.

