

# 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.



• 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.

Search	
Addams	• Filters
Name	\$ ×
ADDAMS	1 I
Save Changes	Q Search -

• 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.

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392 Results	《 ( 1 2	3 4 5 6 7 8 > 3	»	20 Pa	ges										× Clear III Columns
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ABBEY	KALISE	2000 BUNN DR, 62703	01 - ADDAMS	01	DF	Edulog ib									
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student 5b2dee1a-12c1-44	Comple Manual	01/31/2025, 02:		* 1											
student 5b2dee1a-12c1-44	Comple Manual	01/30/2025, 12:		* 1											
student_5b2dee1a-12c1-44	Comple Manual	01/30/2025, 11:5		* 1											
student 5b2dee1a-12c1-44	Comple Manual	01/30/2025, 11:5		* 1											
student_5b2dee1a-12c1-44	Comple Manual	01/30/2025, 11:5		* 1	1										
student 5b2dee1a-12c1-44	Comple Manual	01/30/2025, 01:		± €	1										
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#### 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.

• Choose specific days of the week (Monday through Sunday) to restrict the frequency of the run/route within the exported report. If no days are selected, the report will include all available run covers associated with the selected route.

	Configure Report 🗸 🗸													
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R	un report	O Pas	senger l	ist report.	t									

**Note:** This feature will only be visible within Standard Run and Route reporting modules.

• For the fields you would like to show on the report, select the "Add" button.



#### Available Fields:

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

• The configuration fields will display on the right.

		Configure Report					^
😆 Scheduled 🕒 Portrait 🗸 🕞 .pdf 🗸				Choose a	configuration	+	
Show 1st column Repeat header(s)							
Home Room Teacher		K Remove All	Field Order	Sort Order	Max length	Page	Header label
Home Stop		< Last Name	1	•	12		Header label
Latitude	>	< First Name	2		12	n	Header label
Longitude		Grade	3		12	ň	Header label
Max Ride Time		Mailing Address	4		12	- D	Header label
Middle Name		maining Paraless	4			<u> </u>	Treatier laber
Needs Notes		Phone Number	5	<b>~</b>	12	U	Header label
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.

	а		b		С		d		е	
--	---	--	---	--	---	--	---	--	---	--

« Remove All	Field Order	Sort Order	Max length	Page	Header label
C Last Name	1	2 🗸	12		Header label
First Name	2	•	12	0	(Header label )
Address	3	•	12	0	Header label
Phone Number	4		12	0	Header label
Grade	5	1 🗸	12	0	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.



#### • 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

Вос	dy St	yle			
Ti	*	≫	Α	12	

#### • 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.

Choose a configuration		Û	0
------------------------	--	---	---

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

Addams Student List		Î	G
---------------------	--	---	---

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)666-9999

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-HHmmss	×
yyyyMMdd-HHmm	ISS
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.



There are three options in the Generate Report button.



- 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	III Co	lumn	15		
File Name	Status	Туре	Creation T ↓	Message					
Addams Student Report_2	Comple	Manual	02/11/2025, 06:		*	Û	*		
Addams Student Report_2	Comple	Manual	02/11/2025, 06:		*	Ŵ			
Addams Student Report_2	Comple	Manual	02/11/2025, 06:		*	۵			
student_5b2dee1a-12c1-4	Comple	Manual	01/31/2025, 11:		*	۵			
student_5b2dee1a-12c1-4	Comple	Manual	01/31/2025, 03:		*	۵			

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							
<ul> <li>One Time</li> </ul>	Start Date *	Scheduled Time *					
O Daily	MM/DD/YYYY	HH:MM (O)					
O Day(s) of the Week							
Filter Condition *	Configure Report *						
	• ·	•					
User Defined Filename							
		yyyyMMdd-HHmmssSSS					
File name will be "configuration_name_	yyyyMMdd-HHmmssSSS"						
Export Report To S3							
	Cancel Save						

- 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 S	Schedule		
Schedule				
One Time	Start Date *		Scheduled Time *	
O Daily	02/14/2025	× 🚞	04:00 PM	× O
◯ Day(s) of the Week				
Filter Condition *		Configure Report *		
Addams	× •	Student List		× •
User Defined Filename				
Addams Student List			ууууММо	d-HHmmssSSS
File name will be "Addams Student List	t_yyyyMMdd-HHmms	sSSS"		
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.

	Reporting # Scheduled	Reports						User Surve	Active [	Data Area:	pian 2
					Report List						
											PDF C
Report Type				Format Re	port Name				Sche	edule	
Route				configuration	on_name_datetime				0		
Run				configuration	on_name_datetime				•		
School				configuration	on_name_datetime				0		
Student				configuratio	on_name_datetime				•		
Student TR				configuratio	on_name_datetime				•		
				Sc	beduled Reports						
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Report Type	Report Name	Type	Scheduled Type	Status	Scheduled Time	Executed Time	Next Run Ti	me	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		1	×
					Report Files						
File Name	Report Type		Status	Туре	Report Files Executed Time	Creation Time	User Name	Message			_
File Name Student TR Trip	Report Type Student TR Trip		Status Error	Type Scheduled	Report Files Executed Time	Creation Time	User Name Andrea Brunson	Message Internal server of	error, please conta	ct Edulog Supp	ort
File Name Student TR Trip Unassigned Student TR List.csv	Report Type Student TR Trip Student TR Trip		Status Error Completed	Type Scheduled Scheduled	Report Files Executed Time 03/10/2025, 04:30 PM	Creation Time 03/10/2025, 04:30 PM	User Name Andrea Brunson Andrea Brunson	Message Internal server (	error, please conta	ct Edulog Supp	ort 🛓
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File Name Student TR Trp Unassigned Student TR List csv Student TR Trp Student TR Trp Student TR Trp Student TR Trp Student TR Trp Unassigned Student TR List_2025/ Unassigned Student TR List_2025/ Unassigned Student TR List_2025/	Report Type Student TR Trip Student TR Trip Student TR Trip Student TR Trip Student TR Trip Student TR Trip Student TR Trip 224-16300101 Student TR Trip 217-16300101 Student TR Trip 217-16300101 Student TR Trip		Status Error Completed Error Error Error Error Completed Completed	Type Scheduled Scheduled Scheduled Scheduled Scheduled Scheduled Scheduled Scheduled	Report Files           Executed Time           03/10/2025, 04/30 PM           02/24/2025, 04/30 PM           02/24/2025, 04/30 PM           02/21/2025, 04/30 PM           02/17/2025, 04/30 PM	Creation Time 03/10/2025, 04:30 PM 02/24/2025, 04:30 PM 02/21/2025, 04:30 PM 02/17/2025, 04:30 PM	User Name Andrea Brunson Andrea Brunson	Message Internal server of Internal server of Internal server of Internal server of Internal server of	error, please contai error, please contai error, please contai error, please contai error, please contai	ct Edulog Supp ct Edulog Supp ct Edulog Supp ct Edulog Supp ct Edulog Supp ct Edulog Supp	ort 📩 ort ort ort ort drt <u>±</u> ±
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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.

	PDF CSV
Schedule	
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Scheduled Reports – This is where you will see your scheduled reports. Select the View Reports Queue to see your scheduled report.

					Reports Queue					
										III Col
Report Type	Report Name	Туре	Scheduled Type	Status	Scheduled Time Executed Tim	e 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	
dulog Schools	EdulogSchools	Scheduled	Daily	Pending	02/13/2025, 03:50	02/13/2025, 03:50			plan	
lo Trips No Stops	NoTripsNoStops	Scheduled	Daily	Pending	02/13/2025, 03:50	02/13/2025, 03:50			plan	
lew Student Tally	NewstuTally	Scheduled	Daily	Pending	02/13/2025, 03:00	02/13/2025, 03:00			plan	
lew Student Tally	NewstuTallyDetail	Scheduled	Daily	Pending	02/13/2025, 02:50	02/13/2025, 02:50			plan	
lecord 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	
ay Not Routed	DaysNotRouted	Scheduled	Daily	Pending	02/13/2025, 02:20	02/13/2025, 02:20			plan	
touting Activity	RoutingActivity	Scheduled	Daily	Pending	02/13/2025, 02:10	02/13/2025, 02:10			plan	
ay Not Routed St	DaysNotRoutedSt	Scheduled	Daily	Pending	02/13/2025, 02:00	02/13/2025, 02:00			plan	
top Travel Time	stop_travel_time	Scheduled	Daily	Pending	02/13/2025, 01:45	02/13/2025, 01:45			plan	
tudent Travel Time	student_travel_time	Scheduled	Daily	Pending	02/13/2025, 01:30	02/13/2025, 01:30			plan	
tun 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	
un	RunStonStu TEST	Schodulad	Daily	Pondina	02/12/2025 02:22	N2/12/2025 N2·22	David Goldhard	daoldhora@odulo	nlan	_
6 Results   1 Page					< 1 > »					Records per page (2)

• **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	Туре	Executed Time	Creation Time	Message		
Student List_20250129-150001	Student	Completed	Scheduled	01/29/2025, 03:0	01/29/2025, 03:0		*	Û

## 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	
Addams	
Name	\$ ×
ADDAMS	<b>⊥</b> ⊠
Save Changes	Q Search -

#### 4. Schools Configuration

Go to the Workspace Panel and select your configuration.

			Configure Report					^
Scheduled Portrait - Cpdf - Show 1st column Repeat header(s)					School Add	Iress List		Î
Board ID		《 Remove	re All	Field Order	Sort Order	Max length	Page	Header label
Board Name	>	< Sch	hool Code	1	•	12		Header label
Board School ID		< Nam	me	2	•	12		Header label
Calendar ID		< Add	dress	3	•	12	D	Header label
Country		Grad	ades	4	•	12	D	Header label
Email		< Prog	ograms	5		12	D	Header label
Level	>							
Mailing Address								
Phone Number								

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

School I	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.



#### 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.

=	🗮 Roulting » Reporting » Runs Active Data Area: plan 2									rea: plan 🔗					
Q III Columns									\$	Selected Ru	ns				~
629 Results	< <li>&lt; 1 2 3 4 4</li>	5 6 7 8	>		32 Pages									×	Clear III Columns
🗹 Run ID	Description	Frequency	Load I	Max Duration	Max Loar	Description	Load	Max Duration	Max Load	Run ID	School-BellTime	Status	Stop Count	To or From Sc	
🗹 01.078-R	COPY - REVERSE - ADDAMS IN 1	MTWUF	0	1s	60	COPY - REVERSE - ADDAMS IN 11 MTWU		0	1s	60	01.078-R	01 - 11:30 AM	STA	8	From School
🗹 01.078-R-	R REVERSE - ADDAMS IN 9:00	MTWUF	0 :	24h	60	REVERSE - ADDAMS IN 9:00 MTWUF		0	24h	60	01.078-R-R	01 - 3:30 PM	STA	0	From School
<b>01.082</b>	ADDAMS IN 9:00	MTWUF	1 .	1s	60	ADDAMS IN 9:00 MTWUF		1	1s	60	01.082	01 - 9:05 AM	DYN	1	To School
01.082-R	REVERSE - ADDAMS IN 9:00	MTWU	0	1s	60	REVERSE - ADDAMS IN 9:00	MTWU	0	1s	60	01.082-R	01 - 3:00 PM	STA	0	From School
2 01.140	ADDAMS OUT 3:30	MTWUF	10	1s	60	ADDAMS OUT 3:30	MTWUF	10	1s	60	01.140	01 - 3:30 PM	STA	7	From School
<b>01.178</b>	ADDAMS OUT 3:30	MTWUF	0	1s	60	ADDAMS OUT 3:30	MTWUF	0	1s	60	01.178	01 - 3:30 PM	STA	0	From School
01.178B		MTWUF	0	1h	40		MTWUF	0	1h	40	01.178B	01 - 3:30 PM	STA	0	From School
01.EO1		MTWUF	10	1h	40		MTWUF	10	1h	40	01.EO1	01 - 8:00 AM	STA	4	To School 🗸
01.T01	Test Frequency Run	MTWUF	0 0	ls	0	$\leftarrow \rightarrow - \leftarrow$									F.
🗹 01.T11	Test Frequency Run	MTWU	0 1	ls	0	Configure Report				ort				~	
2 02.015	BLACK HAWK IN 9:00	MTWUF	6	1s	26					Sont		- (			
🗹 02.015-R	BLACK HAWK OUT 3:30	MTWUF	3	1s	26	Scheduled Portrait - [3pdf -	Scheduled 🕑 Portrait 👻 🕞 .pdf 👻							a configuration	
2 02.901		MTWUF	0	1h	40	Show 1st column Repeat header(	Show 1st column Repeat header(s)								
02.911		MTWUF	0	1h	40	Run report      Passenger List report	) Run report O Passenger List report								
02.P01	BLACK HAWK OUT @ 3:30	MTWUF	4	1h	40	Activity Trip	Activity Trip								
02.S01	BLACK HAWK IN @ 9:00	MTWUF	4	1h	40	Aide First		5							
02.S01-C	COPY - BLACK HAWK IN @ 9:00	MTWUF	0 .	1h	40	Aide Last									
<b>0</b> 3.014	HARVARD PARK IN 8:30	MTWUF	8	1s	60										
03.014-R	REVERSE - HARVARD PARK IN 8:30	MTWUF	0	1s	60	Alde Local ID									
<b>03.017</b>	HARVARD PARK IN 8:30	MTWUF	17	1s	60	Bell Time		>							
						Comments		>							
$\leftrightarrow$					+			=							
	Reports Ava	ilable			^					Preview					~
			🛢 View Re	ports Queue	III Columns	User-defined File Name						[]≣ Cor	densed 🗸	/ Header Styl	e 🖉 Body Style
File Name	Status Type Crea	tion Time	Message			Default System File Name								- 8	Generate Report 👻
	No Data	3													

#### 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 🕶			Runs and	Runs and Stops		Î			
Show 1st column Repeat header(s)									
Run report Passenger List report									
Activity Trip		« Remove All	Field Order	Sort Order	Max length	Page	Header label		
Aide First	>	Run ID	1	•	12	D	Header label		
Aide Last	>	Run Description	2	•	12		Header label		
Aide Local ID		C Load	3	•	12		Header label		
Bell Time	>	Covers					•		
Comments	$\rightarrow$								
Driver First Name	$\rightarrow$								
Driver ID	$\rightarrow$								
Driver Last Name	>								

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

Run Re		
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, as well as includes their stop type, level, and vehicle information, 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.

Search	Q
Select or name new search	Filters
Trip Assigned Status	□ Suffix
Select	TR Creation Date
0.5	Transport Need Type
	Transportation Needs
	Trip Assigned Status
	🗆 Trip ID
	🗆 Туре
	Withdraw Date
	Zip Code

#### In the search field, select Unassigned.



#### Then select Search.

Search	
Select or name new search	+ Filters
Trip Assigned Status	\$ ×
Unassigned × Select	0 🖬

#### • 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.

Search				
Unassigned Student TR	+ Filters			
Trip Assigned Status	¢ ×			
Unassigned × Select	0 🖬			
Save Changes	Q 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 accidently overwritten.

#### 3. Configure Report:

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

#### a.) Set to CSV.



b.) Add Fields.

Configure Report										
Scheduled Portrait -	וֹשְׁהָ .pdf ▼			Choo	ose a configui	ration				
Show 1st column Repe	at header(s)						G			
Address	<u>&gt;</u> «	Remove All	Field Order	Sort Order	Max lengt	n Page	Header			
Created		First Name	1	~	12		leader label			
Created By		Last Name	2	~	12		leader label			
Date Of Birth		School	3	~	12		leader label			
District ID		Grade	4		12		leader label			
Edulog ID		Eligibility	5		10		looder lebel			
Email		Englointy	5		12					
Enrollment Date		Trip Daily					÷			
Exclusive Stop	>									
Gender										
Government ID										
Home Stop										

#### Select the "Trip Daily" field, and in the drop-down, select the following fields.

DOULTING & Reporting & Student TR Trip	Stop Type     4     12	0
Roothing "Reporting " Student IN- Inp	Stop Level 5 12	ρ
Selected Student TR	License Plate 6 12	^
Student TR - Trip Student TR Student Trip	Vehicle Comments 7 12	Clear
Address Def District ID Exc First Name Ho Iti	Vehicle Size 8 12	
	Vehicle Classification 9 12	
Contigure Repor	Run Aide 10 12	
Show 1st column Repeat header(s)	Run Comments 11 12	
Phone Number	Run Type 12 12	label
Photo Trip Daily	Run Level     13     12	0

#### 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".

Student List		Û	G
--------------	--	---	---

#### 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 S	chedule		
Schedule				
One Time	Start Date *		Scheduled Time *	
O Daily	02/03/2025	× 🚞	04:30 PM	× 0
	End Date			
Day(s) of the Week	06/27/2025	× 📋		
	Day(s) of the Week *			
	Monday Friday			× -
Filter Condition *		Configure Report *		
Unassigned Student TR	× -	Student List		× -
User Defined Filename				
Unassigned Student TR List			ууууММ	Add-HHmmssSSS
File name will be "Unassigned Studen	nt TR List_yyyyMMdd-H	HmmssSSS"		
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.

E Scheduled Reports								Active Data Ar	rea: plan d	2	
					Report L	ist					
										PDF	CSV
Report Type	Format Report Name										
Route	configuration_name_yyyyMMdd-HHmmssSSS								•		
Run	n configuration_name_yyyyMMdd-HHmmssSSS										
School	2hool configuration_name_yyyyMMdd-HHmmssSSS										
Student				0	onfiguration_name_	yyyyMMdd-HHmmssSSS			•		. 1
Student TR				0	onfiguration_name_	yyyyMMdd-HHmmssSSS					*
4											•
					Manually Run/Sche	duled Reports					
									🗟 View Reports	Queue C Re	load
Report Type	Report Name	Туре	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	C	×	
					Depert F	lee					
Elle Neme	Depart Time		Ste	4110	Tume	Executed Time	Creation Time	Massage			~
Student List 20250129-150001011 ce	student		Sta	mleted	Scheduled	01/29/2025 03:00 PM	01/29/2025_03:00 PM	meeoage		1	
Condisin Elar_20230125*150001011(C5	Siddeni		Col	nprotou	oundalied	0 02.0/2025, 05.00 PM	0 112.012.02.0, 00.00 P.W			-	

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