

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.

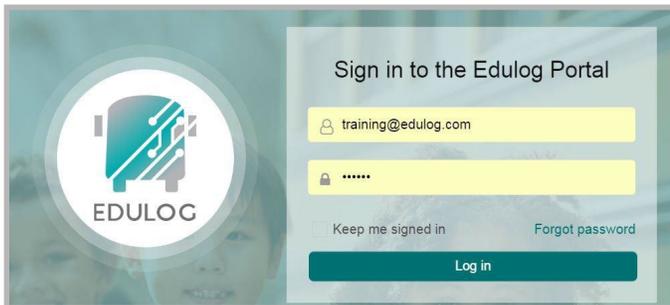
ATHENA REPORTING INTRODUCTION

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

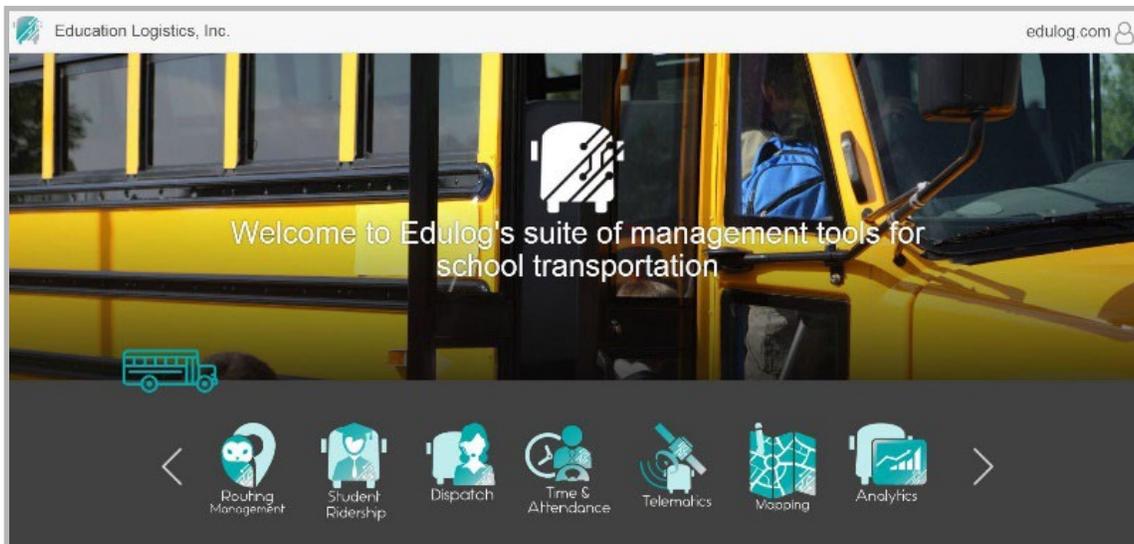
1. Sign In

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.



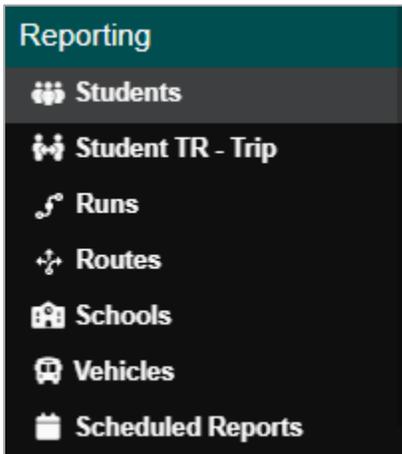
3. Routing Management

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



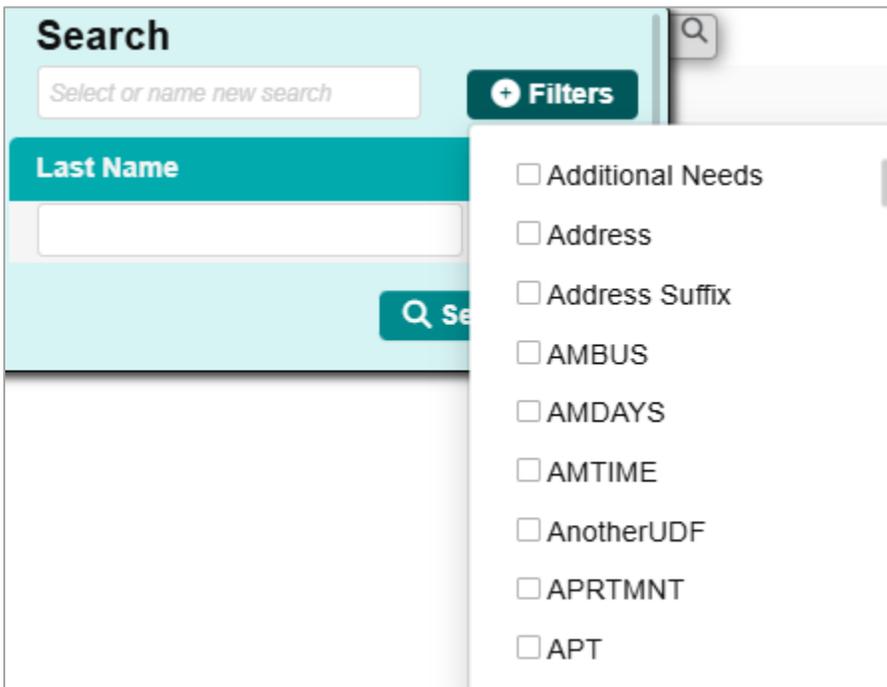
4. Reporting Modules

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

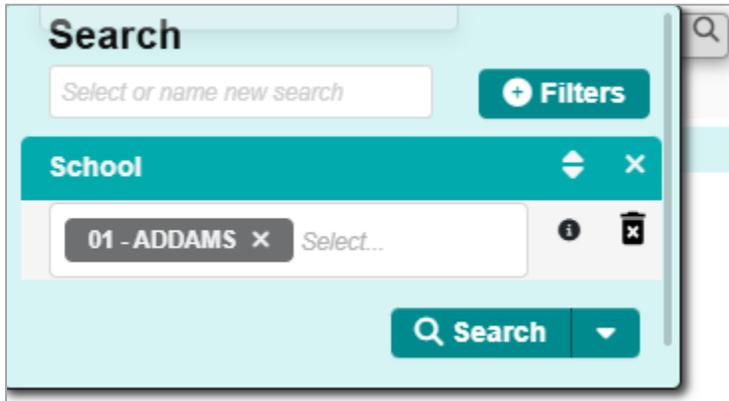


5. Reports Search Tray

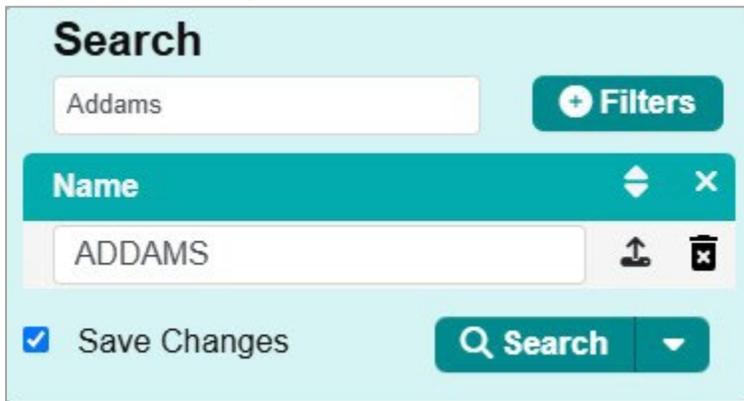
The Search Tray will appear, and you will have the option between several different filters. Scroll down and select the "School" filter.



- 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.



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

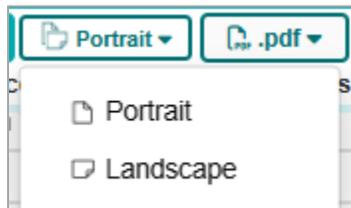


6. Reports Data

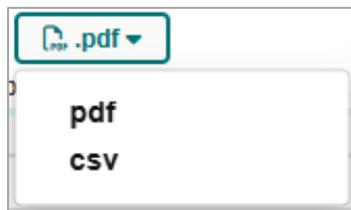
Students will be listed in the Data Panel, and when students are selected, they will also appear in the Workspace Panel under the Selected Students card.

7. Configure Report

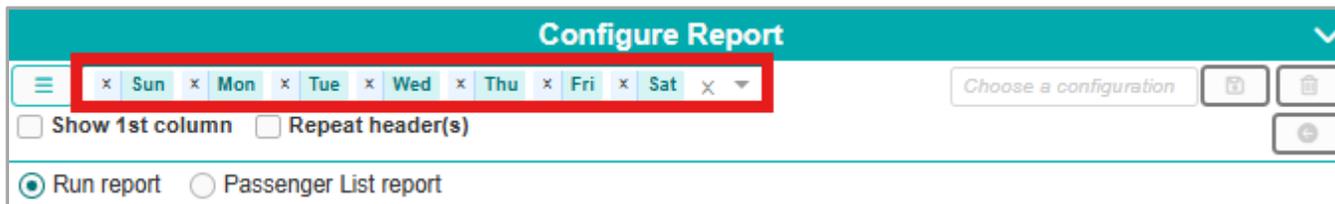
- First, select how you want your report in either Portrait or Landscape.



- 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.



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	>	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.

Configure Report

Scheduled Portrait .pdf Choose a configuration

Show 1st column Repeat header(s)

	Remove All	Field Order	Sort Order	Max length	Page	Header label
Home Room Teacher	<					
Home Stop	<					
Latitude	<	1	v	12	1	Header label
Longitude	<	2	v	12	1	Header label
Max Ride Time	<	3	v	12	1	Header label
Middle Name	<	4	v	12	1	Header label
Needs Notes	<	5	v	12	1	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.



< 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.

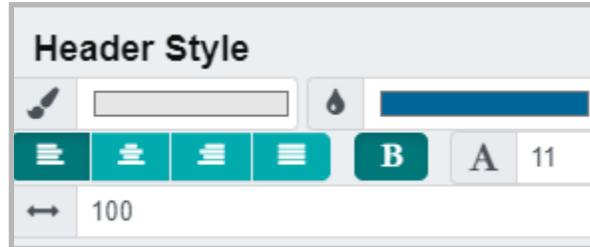
Student Report				
First Name	Last Name	Date Of Birth	Mailing Address	Phone Number

- **Change Style**

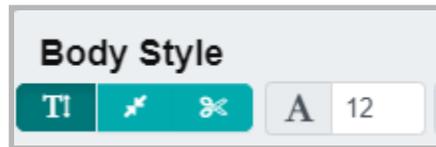
You can change the style of the report in several different ways: Condensed or Normal spacing, the Header Style and the Body Style.



- 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

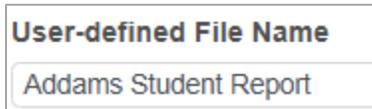
Once the fields are added, you will see a Preview of the report populate below. As you add and remove fields from the Configure Report card, the Preview will update accordingly.

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.

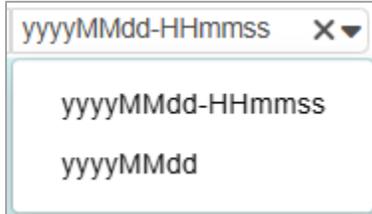
- **User-defined File Name**

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



A text input box with a light blue border. The title "User-defined File Name" is displayed in bold blue text at the top. Below the title, the text "Addams Student Report" is entered into the input field.

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



A dropdown menu with a light blue border. The selected option is "yyyyMMdd-HH:mm:ss" with a small "X" icon and a downward arrow to its right. Below the dropdown, two other options are visible: "yyyyMMdd-HH:mm:ss" and "yyyyMMdd".

Then select Save, to save the name.

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

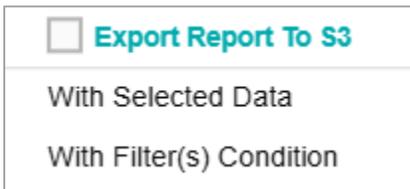
9. Generate Report

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



A teal button with a white border and a small downward arrow on the right side. The text "Generate Report" is written in white.

There are three options in the Generate Report button.



A dropdown menu with a light blue border. The top option is "Export Report To S3" with an unchecked checkbox to its left. Below it are two other options: "With Selected Data" and "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.

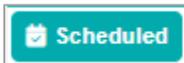
Reports Available					
File Name	Status	Type	Creation T... ↓	Message	
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...		 
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...		 
Addams Student Report_2...	Comple...	Manual	02/11/2025, 06:...		 
student_5b2dee1a-12c1-4...	Comple...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

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

yyyyMMdd-HHmmsSSS

File name will be "configuration_name_yyyyMMdd-HHmmsSSS"

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 Schedule

Schedule

One Time
 Start Date *
Scheduled Time *

Daily
 02/14/2025
04:00 PM

Day(s) of the Week

Filter Condition *
Configure Report *

Addams
Student List

User Defined Filename

Addams Student List
yyyyMMdd-HHmmsSSS

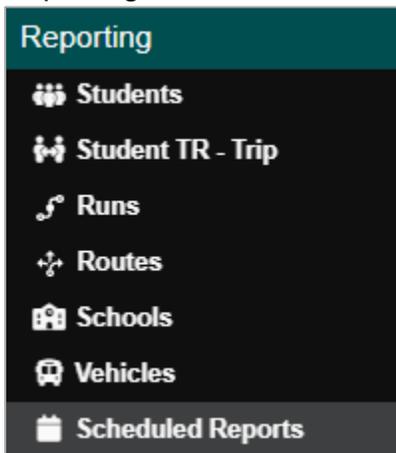
File name will be "Addams Student List_yyyyMMdd-HHmmsSSS"

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 Survey Active Data Area: plan

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	

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			

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.



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 Stu...	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	RunStnStu_TEST	Scheduled	Daily	Pending	02/12/2025, 02:22 ...		02/12/2025, 02:22 ...	David Goldthorn	dgoldthorn@edulo...	plan	

16 Results | 1 Page Records per page (20)

- **Report Files** – Once your report has been generated, you can download them from the Report Files card by selecting the downloads icon.

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

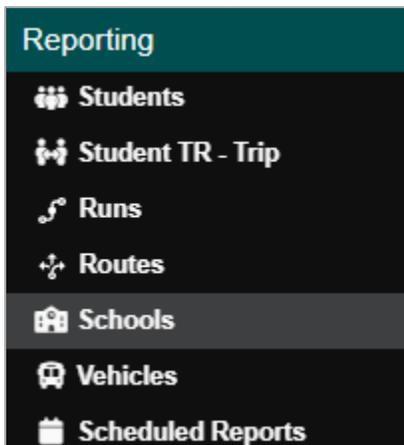
Generate Schools Report

Here's How

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

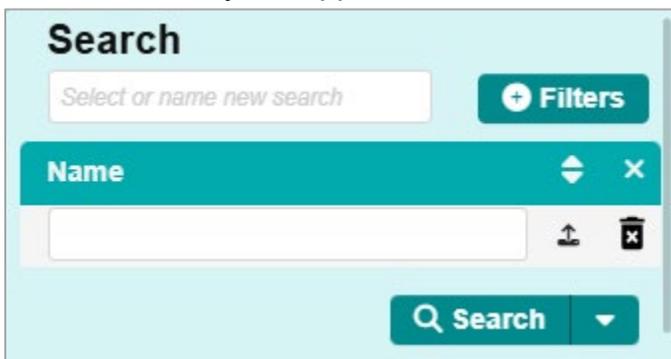
1. Schools Report

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

Addams Filters

Name ↕ ×

ADDAMS ↑ ↓

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)

	<< Remove All	Field Order	Sort Order	Max length	Page	Header label
Board ID	<	School Code	1	12		Header label
Board Name	<	Name	2	12		Header label
Board School ID	<	Address	3	12		Header label
Calendar ID	<	Grades	4	12		Header label
Country	<	Programs	5	12		Header label
Email	>					
Level	>					
Mailing Address	>					
Phone Number	>					

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

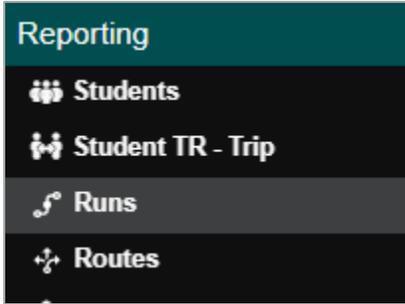
With Selected Data

With Filter(s) Condition

Generate Run Report

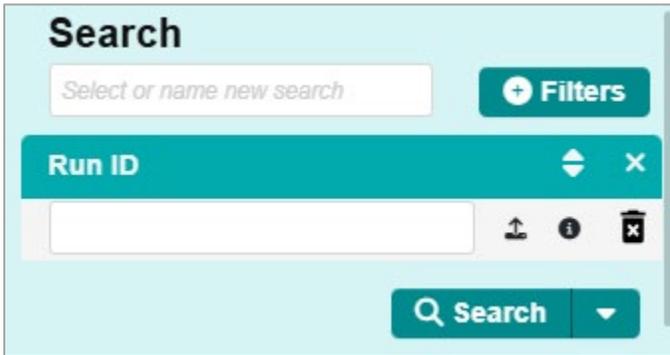
1. Runs Report

Under Reporting select Runs.



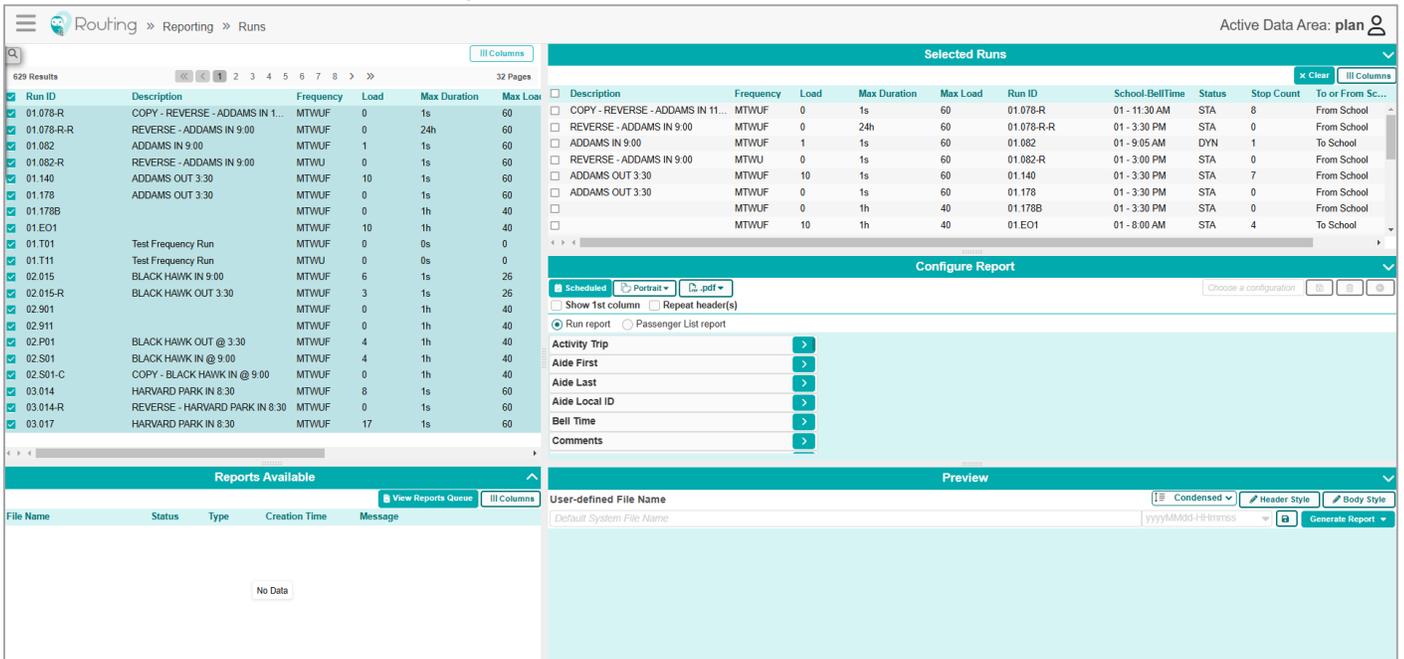
2. Runs Search Tray

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.



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 Stops

Show 1st column Repeat header(s)

Run report Passenger List report

	Field Order	Sort Order	Max length	Page	Header label
Activity Trip					
Aide First					
Aide Last					
Aide Local ID					
Bell Time					
Comments					
Driver First Name					
Driver ID					
Driver Last Name					
<< Remove All					
< Run ID	1	▼	12	📄	Header label
< Run Description	2	▼	12	📄	Header label
< Load	3	▼	12	📄	Header label
< Covers					+

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

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.



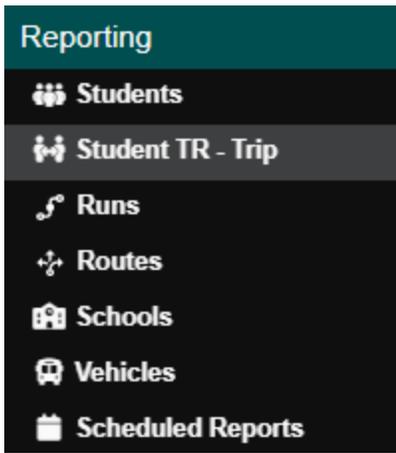
Schedule a CSV Student Trip Report

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

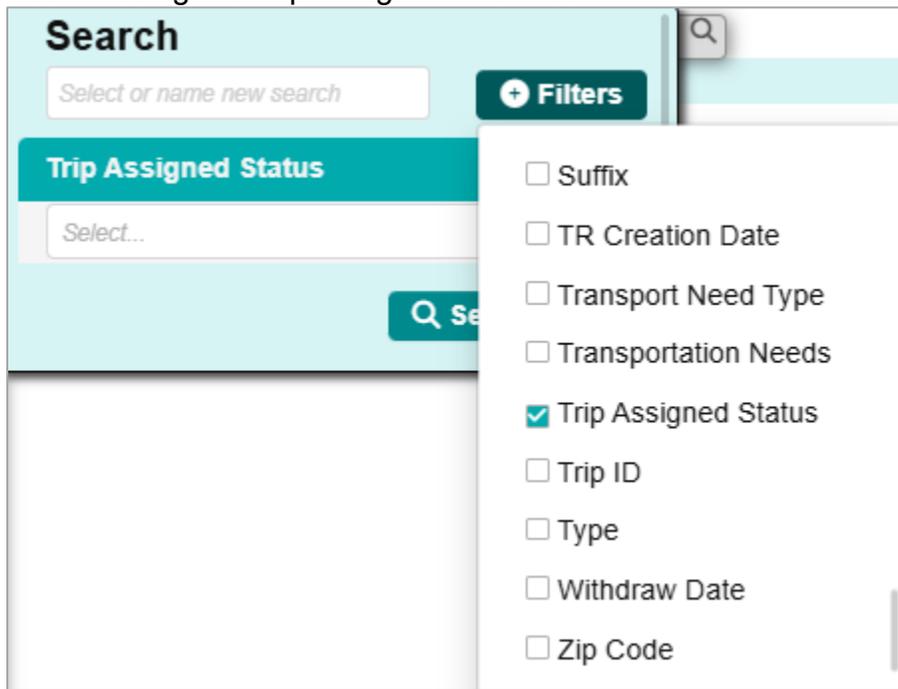
1. Student TR – Trip Report

Navigate to the Reporting Student TR-Trips Module.

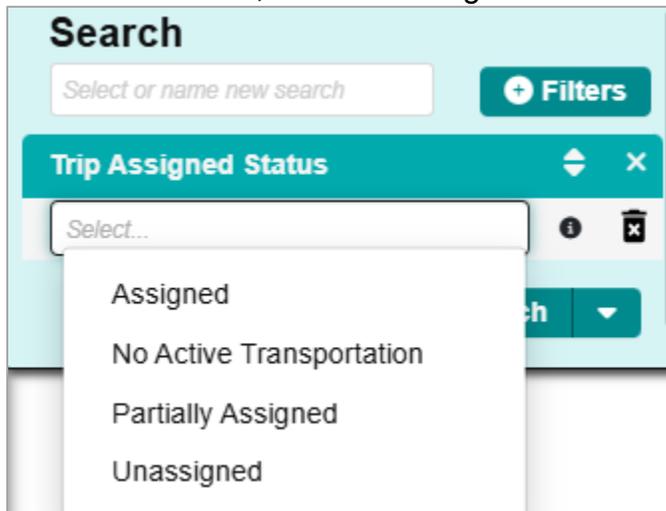


2. Student TR Trip Search Tray

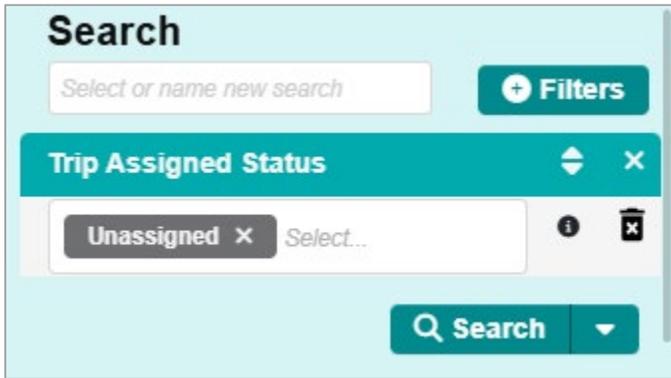
Search using the Trip Assignment Status filter.



In the search field, select Unassigned.

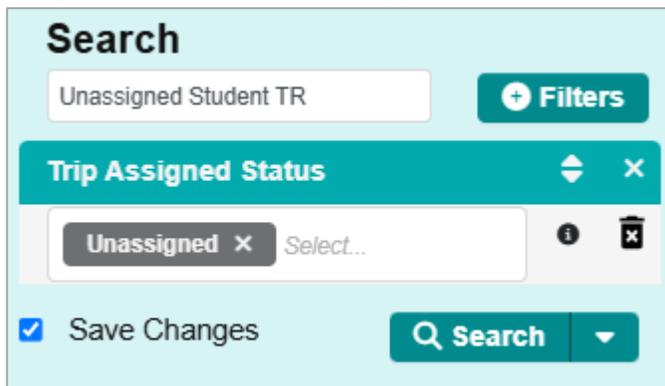


Then select Search.



- **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.



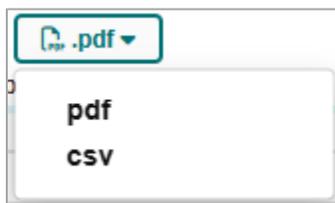
The search tray update with an additional Save Changes field following saving it as a template.

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.

Configure Report

Scheduled Portrait .pdf Choose a configuration

Show 1st column Repeat header(s)

	Field Order	Sort Order	Max length	Page	Header
Address					
Created					
Created By					
Date Of Birth					
District ID					
Edulog ID					
Email					
Enrollment Date					
Exclusive Stop					
Gender					
Government ID					
Home Stop					
< Remove All					
< First Name	1	▼	12		Header label
< Last Name	2	▼	12		Header label
< School	3	▼	12		Header label
< Grade	4	▼	12		Header label
< Eligibility	5	▼	12		Header label
< Trip Daily					

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

Routing » Reporting » Student TR - Trip

Selected Student TR

Student TR - Trip Student TR Student Trip

Address Def... District ID Exc... First Name Ho... Iti

Configure Report

Scheduled Portrait .pdf Choose a configuration

Show 1st column Repeat header(s)

Phone Number

Photo

< Remove All

Trip Daily

Stop Type	4	12	
Stop Level	5	12	
License Plate	6	12	
Vehicle Comments	7	12	
Vehicle Size	8	12	
Vehicle Classification	9	12	
Run Aide	10	12	
Run Comments	11	12	
Run Type	12	12	
Run Level	13	12	

Do Clear label

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

Save Delete Refresh

4. Schedule Report

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

Scheduled

The Create Schedule window will open.

Create Schedule

Schedule

One Time
 Daily
 Day(s) of the Week

Start Date *

Scheduled Time *

End Date

Day(s) of the Week *

Filter Condition *

Configure Report *

User Defined Filename

yyyyMMdd-HHmssSSS
 File name will be "Unassigned Student TR List_yyyyMMdd-HHmssSSS"

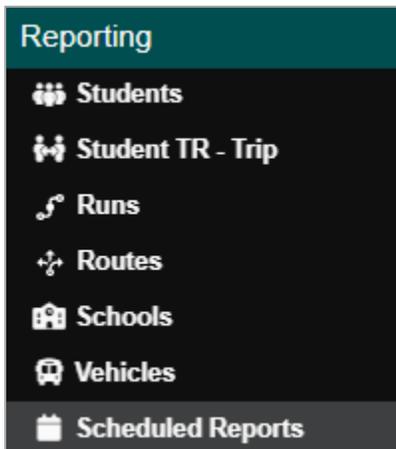
Export Report To S3

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.

Report List

PDF CSV

Report Type	Format Report Name	Schedule
Route	configuration_name_yyyyMMdd-HH:mm:ssSSS	<input type="checkbox"/>
Run	configuration_name_yyyyMMdd-HH:mm:ssSSS	<input type="checkbox"/>
School	configuration_name_yyyyMMdd-HH:mm:ssSSS	<input type="checkbox"/>
Student	configuration_name_yyyyMMdd-HH:mm:ssSSS	<input type="checkbox"/>
Student TR	configuration_name_yyyyMMdd-HH:mm:ssSSS	<input type="checkbox"/>

Manually Run/Scheduled Reports

View Reports Queue Reload

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		

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	