



ATHENA ADVANCED REPORTS

Education Logistics, Inc.

Training
Guide

2025



Athena Advanced Reports

Training Guide

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INTRODUCTION

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

PURPOSE

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

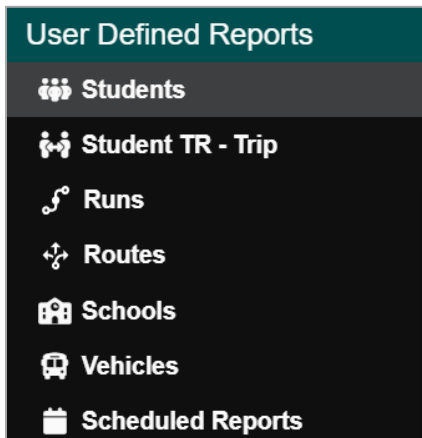
In addition to the enhanced design capabilities, users will find the same reporting modules and fields available in the Advanced Reporting section as in the Standard Reports. This ensures that any report created in the Standard Reports can be recreated and further tailored to meet the unique needs of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

NAVIGATING THE ADVANCED REPORTS MODULE

1. Navigate into the Routing Management application.



2. Navigate into the Students reporting module within User Defined Reports.



3. Advanced Reporting Layout:

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

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

The screenshot shows the "Routing" application's "User Defined Reports" section for "Students". The interface is divided into several panels:

- Search Tray (a):** Located at the top left, it includes a search input field, a "Filters" button, and a "Search" button.
- Queried Data {Students} (b):** A table displaying search results for students. The table has columns: "Exc...", "First Name", "Ho...", "Itin...", "Last Name", "No...", and "SCHO". It shows several rows of data, including student IDs and names like "AAA1", "test", "KALISE", and "KAMARE".
- Report Templates (c):** A section below the queried data, showing a list of templates with columns for "Template Name", "Created Date", and "Created By". It includes buttons for "New", "Clone", "Delete", and "Columns".
- Reports Available (d):** A section at the bottom left, showing a list of reports with columns for "File Name", "Status", "Type", "Creation Time", "User", and "Message". It includes a "View Report Queues" button.
- Selected Students (e):** A panel on the right side, showing a list of selected students with columns: "Address", "Def...", "Eligibility", "Exc...", "First Name", "Ho...", "Itin...", and "Last N". It includes a "Clear" button and a "Columns" button.
- Preview (f):** A panel on the right side, showing a preview of a report. It includes a "User-defined File Name" field, a "Scheduled" button, and a "Generate Report" button.

Search Tray:

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

Search

Filters

Last Name

Q Search

Queried Data – Students Card:

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

Students

Columns

400 Results

<<

<

1

2

3

4

5

6

7

8

>

>>

20 Pages

	Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...	Las
<input type="checkbox"/>	706 E CAR...		12345678_...	Out of area	×	AAA1	✓	×	A
<input type="checkbox"/>	210 Bitterro...		12345678	Out of area	×	AAA1	✓	×	A
<input type="checkbox"/>	332 N Wesl...	✓		Eligible	×	test	×	×	A
<input type="checkbox"/>	4 BELHAVE...		1390122	Out of area	×	KALISE	✓	×	A

Report Templates:

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

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Report Templates		
<div> <div>New</div> <div>Design</div> <div>Clone</div> <div>Delete</div> <div>Columns</div> </div>		
Template Name	Created Date ↓	Created By
bt	05/16/2025 11:59	Bailey Eggebrecht
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01
holw_temp6	04/23/2025 14:41	JD Holwick
test4	04/21/2025 12:21	Jordon Faircloth
Test2	04/21/2025 12:14	David Goldberg
31 Results 2 Pages		Records per page (20)

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

a.) New:

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

New

Report Templates

New

Design

Clone

Delete

Columns

Enter new template name

Save

Cancel

☐ Show 1st column

☐ Repeat header(s)

Portrait

Filter

☐ Student

☐ Address
 ☐ Created
 ☐ Created By
 ☐ Date Of Birth
 ☐ District ID
 ☐ Edulog ID

Note: Fields chosen when building the template can always be added or removed later within the Design feature.

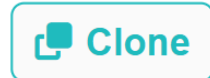
b.) Design:

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



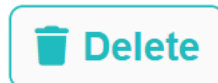
c.) Clone:

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



d.) Delete:

The Delete tool allows the user to delete unlocked templates.



Reports Available:

Successfully generated reports will be displayed in the Report Available Card with the following information:

- File Name
- Status
- Creation Time
- User Name
- Message

Reports Available					
File Name	Status	Type	Creation Time	User Name	Message

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

Selected Card – Selected Students:

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

Selected Students							
				X Clear		Columns	
Address	Def...	District ID	Eligibility	Exc...	First Name	Ho...	Itin...
> 214 S STAT...		14031857	Out of area	X	STUDENT	✓	X
> 1617 E Bro...		14031858	Out of area	X	STUDENT	✓	X
> 306 S STAT...		14031859	Out of area	X	STUDENT	✓	X

Preview:

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

Preview

User-defined File Name

Scheduled

Generate Report

Default System File Name

yyyyMMdd-HH:mm:ss

Student Report

District ID	Created By	Date Of Birth
000000437370	UNKNOWN	12/3/11

ATHENA ADVANCED REPORTS USER STORIES

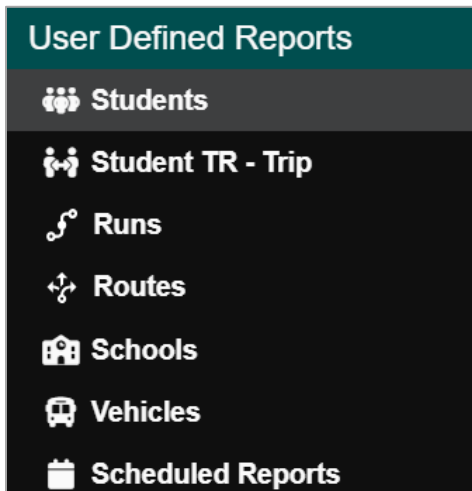
The User Stories section of this guide will offer you scenarios that are applicable to some of the workflows you might encounter in your day-to-day tasks within Athena. Some scenarios that will be discussed include:

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

Create a New Template

Here's How:

1. Navigate into the Students module within User Defined Reports.



2. Within the Report Templates card, select "New".

Report Templates		
<div> New Design Clone Delete Columns </div>		
Template Name	Created Date ↓	Created By
bt	05/16/2025 11:59	Bailey Eggebrecht
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01
holw_temp6	04/23/2025 14:41	JD Holwick
test4	04/21/2025 12:21	Jordon Faircloth
31 Results 2 Pages		Records per page (20)

3. Within the new column, select the following reporting fields to be included in your template:
 - School
 - Grade
 - Last Name
 - First Name
 - Eligibility

The 'Report Templates' interface displays a table of existing templates and a sidebar for filtering options.

Template Name	Create...	Created By
bt	05/16/2025 1...	Bailey Egge
qr_code	05/06/2025 2...	Athena ath
Quincy_JasperReview	05/06/2025 1...	Quincy For
TestFont	05/05/2025 1...	Barak Nels
test	04/29/2025 0...	Athena ath
holw_temp6	04/23/2025 1...	JD Holwick
test4	04/21/2025 1...	Jordon Fair

31 Results | 2 Pages | 1 | 2 | Records per page

Filter options:

- ☐ Show 1st column
- ☐ Repeat header(s)
- ☒ Student
 - ☐ Address
 - ☐ Created
 - ☐ Created By
 - ☐ Date Of Birth
 - ☐ District ID

Buttons: New, Design, Clone, Delete, Columns, Save, Cancel, Portrait.

4. Add an identifiable name for the template.

The 'Report Templates' interface shows a new template name 'My_New_Template' entered in the input field, highlighted by a red arrow.

Buttons: New, Design, Clone, Delete, Columns, Save, Cancel, Portrait.

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

- Enable to "Show 1st Column" on all pages
- Enable to "Repeat Headers" on all pages
- Select whether the report will be a portrait or landscape layout

The 'Report Templates' interface shows the 'Show 1st column' and 'Repeat header(s)' options selected, and the 'Portrait' layout selected in the dropdown menu.

Buttons: New, Design, Clone, Delete, Columns, Save, Cancel, Portrait.

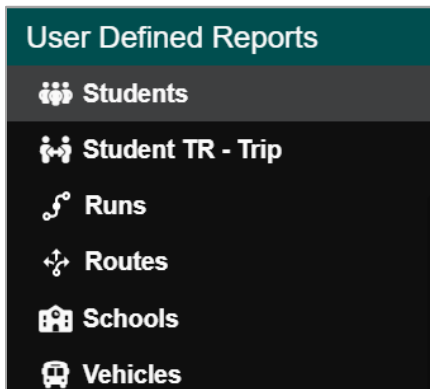
6. Save the additions, and view the saved template within the Report Templates card.

Report Templates		
<div> <div>New</div> <div>Design</div> <div>Clone</div> <div>Delete</div> <div>Columns</div> </div>		
Template Name	Created Date ↓	Created By
My_New_Template	06/09/2025 17:58	Paulina Rios
bt	05/16/2025 11:59	Bailey Eggebrecht
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01
holw_temp6	04/23/2025 14:41	JD Holwick

Clone a Template

Here's How:

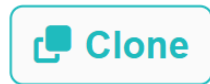
1. Navigate into the Students module within User Defined Reports.



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

Report Templates		
<div> <div>New</div> <div>Design</div> <div>Clone</div> <div>Delete</div> <div>Columns</div> </div>		
Template Name	Created Date ↓	Created By
My_New_Template	06/09/2025 17:58	Paulina Rios
bt	05/16/2025 11:59	Bailey Eggebrecht
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01

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



Report Templates		
<div>NewDesignCloneDeleteColumns</div>		
Template Name	Created Date ↓	Created By
My_New_Template	06/09/2025 17:58	Paulina Rios
bt	05/16/2025 11:59	Bailey Eggebrecht
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01

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

Report Templates		
<div>NewDesignCloneDeleteColumns</div>		
Template Name	Created Date ↓	Created By
My_New_Template	06/09/2025 17:58	
bt	05/16/2025 11:59	
qr_code	05/06/2025 21:24	Athena ath-uat01
Quincy_JasperReview	05/06/2025 11:04	Quincy Fordah
TestFont	05/05/2025 18:21	Barak Nelson
test	04/29/2025 03:08	Athena ath-uat01

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

Routing

» User Defined Reports » Students

Students

Report Templates

NewDesignCloneDeleteColumns

Template NameCreated Date

Cloned_Template06/10/2025 09:24

My_New_Template06/09/2025 17:58

bt05/16/2025 11:59Bailey Eggebrecht

qr_code05/06/2025 21:24Athena ath-uat01

Quincy_JasperReview05/06/2025 11:04Quincy Fordah

TestFont05/05/2025 18:21Barak Nelson

test04/29/2025 03:08Athena ath-uat01

holw_temp604/23/2025 14:41JD Holwick

test404/21/2025 12:21Jordon Faircloth

Test204/21/2025 12:14David Goldberg

TestClone204/21/2025 11:32David Goldberg

33 Results | 2 Pages

Records per page (20)

User Survey

Successfully Clone Template Successfully

AddressDef...District IDEligibilityExc...First NameHo

Preview

User-defined File Name

ScheduledGenerate Report

Default System File NameyyyyMMdd-HH:mm:ss

Student Report

SchoolLast NameFirst NameEligibilityGrade

SchoolLastFirstEligible01